

1.) INCOMING NSF Grant Transfer Procedures

REQUIRED from PI, for each grant transfer:

a copy of the original NSF award letter (s)
a full copy of the proposal (s)
(PDF email attachments preferred)

REQUIRED from U of M administrator for each grant transfer:

a PAF for the amount being transferred
an itemized budget and budget justification in NSF format in the amount being transferred.

2.) OUTGOING NSF Grant Transfer Procedures

Here are the steps in the order they must occur:

- PI initiates Grant Transfer via fastlane, (fastlane instructions below)

If you receive the message, • **The FCTR (Federal Cash Transaction Report) has not been posted for the quarter just ended. You may not initiate a Grant Transfer Request until your institution—NSF —which is the current awardee institution—submits this report. Contact your institution's business office for further information.**

The transfer cannot be initiated FINOPS must enter the FCTR via fastlane. Once, FINOPS completes the FCTR:

PI and FINOPS MUST AGREE ON THE AMOUNT BEING TRANSFERRED. THIS AMOUNT SHOULD BE OBTAINED AFTER ALL CHARGES HAVE POSTED TO THE AWARD.

ELECTRONIC TRANSFER CANNOT PROCEED UNTIL FASTLANE and FINOPS AGREE.

- DRDA will confirm the amount of the transfer (fastlane) with FINOPS. If the amount entered in fastlane by the PI does not agree with FINOPS, the department will be notified.
(consult with FINOPS again, until an agreed amount of transfer can be reached.)

Once amounts are ok,

- SRO will electronically submit transfer via fastlane to new institution.
- **NEW institution accepts the electronic transfer via fastlane with the new budget / budget justification.**

3.) NSF fastlane instructions for initiating a grant transfer (incoming / outgoing)

Go to the Fastlane Website:

<https://www.fastlane.nsf.gov/fastlane.jsp>

The PI should:

- Log into "proposals/awards/status" with their password.
- Select Award and Reporting Functions
- Select Notifications and Requests
- Select the grant to transfer and click 'prepare new"
- Under "requires NSF approval" select the PI transfer button.
- Complete the first part with the correct information.
- The original SRO Office will forward it to the new SRO Office
- The new SRO Office will complete the budget and forward it to NSF