Key Member Change Instructions

1. Create spreadsheet(s) of roles and key members to be changed
   - Run GA Reference Module in UBI
   - Select your Project Own Org Name in the Quick Start Menu (or Award Own Org if changing Award Key Members)
     - Click on Change Req tab
- Award Key Member Change Request is the default table.

- Press the **Show Project Key Member Change Request** button to switch to Projects

- Use Selection Panes along the left the margin to narrow results to the awards, projects, and roles you want change such as role name, current key member, etc.

*This table will only show active/open awards and projects.*

- Export to Excel (Right click in the table and click on Export) – You will need to adjust the width of some of the columns.
2. Add replacement names to Spreadsheet(s)*
   - You will need the Employee Name (exactly as it is stored in the Integrated System) and the Employee Number that will be added to a role.
     - This information can be found in the Eligible Key Member Report table, the table to the right of the Award/Project Key member change request table in the Change Req tab of the GA Reference Module.

   ![Image of GA Reference Module]

   - Click in the column name and type to filter by Employee Name or Employee Org.

   ![Image of Eligible Key Member Report]

   - Delete any projects/awards (rows) that have any status other than open.
   - Copy Employee Number/Employee Name and paste into spreadsheet columns, New Role Holder Name/New Role Holder Emp Nbr
   - You can use different replacements for different rows
   - If desired, change the New Role Holder Start Date column to reflect the date you want the replacements to be effective *(it defaults to the date you ran the report)*
   - If just end-dating a role without a replacement, put “NONE” in New Role Holder Name column *(certain roles MUST have a replacement)*
   - Delete any rows you do not want changed
   - Do not change column headings
   - Do not change data in any columns other than Start Date

3. Send Spreadsheet to a Role Manager
   - Send an e-mail with the spreadsheet attached to the Role Maintainer email address for your area
     - List of Role Managers

4. **If 50 or more changes**, Role Manager send spreadsheet to Enterprise Applications
   - Send an e-mail to ea-garequests@virginia.edu
   - Include:
     - Spreadsheet(s) with replacements
     - Name of Responsibility used by Role Managers
   - IS will confirm Role Manager’s Responsibility and will make the changes using that responsibility *(thereby adhering to Role manager’s limitations)*