

MATRIX: Required Documents for Outgoing Subagreement Requests

	Transaction Type	Detailed Budget	Budget Justification	Scope of Work	Sponsor Prior Approval	LOI/Facepage
Amendments	Additional Funding	x				
	Additional Terms & Conditions					
	Carryover and Additional Funds	x			x	
	Carryover Only**	x			x	
	Change in Budget	x			(x)	
	Change in PI				(x)	
	Change in UNC PI				(x)	
	Change in SOW			x	x	
	Deobligation of Funds*				(x)	
	Early Termination without Deobligation*				(x)	
	No-Cost Extension				(x)	
	Break in Period of Performance	x	x	x		x
Initial	New Subagreement	x	x	x		x

x = Requirement to issue draft agreement.

(x) = Required only if Sponsor Approval is needed for action/ if Sponsor requirement.

*Additional requirements: For deobligation and early termination amendments, additional documentation needs to be provided acknowledging subrecipient's confirmation of forthcoming deobligation/termination. Deobligation amendments may require a revised budget and budget justification dependent upon Prime Sponsor requirements.

**If UNC has automatic carryover and the subrecipient is foreign, UNC PI approval is required. If UNC does not have automatic carryover, sponsor prior approval is required.