Submitting An Institutional Change Form

In preparation for submitting an Institutional Change Form (ICF), please note the following:

- Only the individual identified as the institution's TRACS Liaison will be able to initiate and submit an ICF.
- First, identify the category of ICF to be submitted prior to beginning the process. See TRACS Policy BP226.
- The Liaison must use the appropriate (according to the ICF to be submitted) downloadable Prospectus Checklist provided on the TRACS portal to submit information for the proposed change.
- Once an ICF has been submitted, the institution's assigned TRACS staff representative will review the ICF to ensure that it has been submitted under the appropriate category. Once it has been determined that the ICF has been submitted under the appropriate category, the ICF will be reverted to the institution for resubmission and payment of the ICF review fee (if applicable).
- Payment of the ICF review fee (if applicable) will be required to successfully resubmit the ICF. Payment may be made via credit card or bank draft (U.S. based banks only). The ICF may not be resubmitted without the appropriate required payment.
- All communications, including any staff requests for additional information related to the ICF as well as notification of a final decision regarding the ICF, will be submitted via the TRACS portal. If the institution needs a printed copy of the final decision letter regarding the ICF, the institution may simply log into the institution's portal account and download the letter. Printed decision letters will not be provided unless specifically requested.
- The Liaison may initiate, save, revise, and add supporting documentation to the ICF as many times as needed before submission.

Procedures for submitting an Institutional Change Form (ICF)

1. Log into the TRACS portal. To access the TRACS portal, go to www.tracs.org and click on the tab marked "Portal".
2. Select "Documents" (upper left).
3. Click "+Start Document" and select "Institutional Change Form".
4. Overview information for the ICF will be displayed. Scroll down and click "Continue".
5. Select the appropriate category of ICF according to the nature of the proposed change and click the radio button (circle) next to the number.

6. A drop-down menu with a list of required items will open. Scroll to the bottom of that list and find the statement starting with “Please download the ‘XX Prospectus Checklist....”.
7. Save the Prospectus Checklist to your computer. Rename the document for easy identification. Please include the category of ICF and the institution name in the new document file name.
8. Open the document and address each Prospectus Checklist item. When finished, attach the Prospectus Checklist document to the ICF by dragging and dropping the file using the link provided within the item labeled “To attach a file….” found at the end of the prospectus list for your item. You may upload additional supporting documentation using the same process.
9. Scroll to the bottom of the page and provide a brief description of the proposed change.
10. Read the acknowledgement statement and click “I agree”.
11. If you are not ready to submit the ICF, be sure to select “Save” or “Save and Exit” to retain your work. Again, the Liaison may initiate, save, revise, and add supporting documentation to the ICF as needed before submission.
12. Once the ICF is ready for submission, select “Save and Proceed to Next Section”.
13. The ICF Review Fee (if any) will be detailed on the next page. Payment of the ICF Review Fee (if required) may be made via credit card or bank draft (U.S. based banks only). The ICF may not be submitted until payment of the applicable ICF Review Fee is made.
14. Once payment of the ICF Review Fee has been made and the ICF has been submitted, the institution will no longer be able to revise the ICF, unless it is reverted to your institution by the TRACS staff representative.

If you have any technical issues regarding the ICF submission process, please contact techsupport@tracs.org.