

## Add or Reduce Grant Funding

This guide covers how to process an increase or decrease in grant funds. First, you need to adjust and finalize the Project Budget. You then need to enter a contract amendment, update the contract Billing Limit, and process the contract amendment.

**WARNING!** All components of the grant (the award, contract, and project) should be kept in sync. Updating one component and not updating another can lead to confusion and processing errors.

If you need to add a new project, refer to the [Add New Project and Activities](#) guide.

### Step 1: Adjust the Project Budget

1. Navigate to the **Project Budget** page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Awards, left menu, Project Budgets.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Maintain Award, Project Budgets.

2. On the **Find an Existing Value** page for Project Budgets, verify the Business Unit and enter search criteria.
3. Select the **Search** button.

The screenshot shows the 'Project Budgets' search interface. On the left is a navigation menu with 'Project Budgets' selected. The main area is titled 'Find an Existing Value' and contains search criteria fields. The 'Business Unit' dropdown is set to 'G0201' and the 'Project' dropdown is set to 'G02FSDDC230'. Below these are fields for Budget Plan ID, Budget Period, Budget Type, and Description. At the bottom, there is a 'Search' button and a 'Clear' button. A 'Recent' section at the top allows for selecting from previous searches.

4. Select the Project you want to work with from the **Search Results**.

Search Results  
1 rows - Business Unit "G0201" Project "G02FSDDC230"

Business Unit	Project	Budget Plan ID	Budget Period	Budget Type	Description
G0201	G02FSDDC230	1	1	Cost	State Developmental Disabiliti

5. The **Budget Detail** page displays. Because you cannot change existing budget lines that have been finalized, you must add new budget lines. Use the scroll bar to access the far right of the page and select the **Plus (+)** button.

Budget Detail  
Project: G02FSDDC230 State Developmental Disabiliti  
Budget Period: 1 Begin Date: 10/01/2022 End Date: 09/30/2024 Finalize Process Monitor

Project Budget Summary  
Cost Share Direct: \$0.00 Currency: USD Total Budget: \$1,184,787.00  
Sponsor Budget: \$1,184,787.00 Security Status: None

Budget Amounts for Period

Fund Code	Financial Department ID	Appropriation ID (CF3)	Activity	Analysis Type	Source Type	Budget Item	Quantity	Amount	Transaction ID	Commitment Control Status	Journal ID	Ledger
3000	G0231081	G021362	2300	BUD	BUD	ALL	1.00	80,000.00	271547447	Distributed	0271547457	KK_PRC_BUD
3000	G0231081	G021362	2301	BUD	BUD	ALL	1.00	233,498.00	271547448	Distributed	0271547458	KK_PRC_BUD
3000	G0231081	G021362	2302	BUD	BUD	ALL	1.00	80,000.00	271547449	Distributed	0271547459	KK_PRC_BUD

**Note:** The above grid has the **Show all columns** icon selected and has been personalized to facilitate display on the page.

6. In this example, we are reducing one Activity line. Select the **Plus (+)** button to add one lines.

Budget Amounts for Period

Fund Code	Financial Department ID	Appropriation ID (CF3)	Activity	Analysis Type	Source Type	Budget Item	Quantity	Amount	Commitment Control Status	Journal ID	Ledger
3000	G0231081	G021362	2300	BUD	BUD	ALL	1.00	80,000.00	Distributed	0271547457	KK_PRC_BUD
				BUD				0.00	None		KK_PRC_BUD

7. For each row, enter the following on the **General** tab.

Field Name	Field Description
<b>Amount</b>	Enter a negative amount for a reduction or a positive amount for an addition to funding.
<b>*Analysis Type</b>	Select "BUD" (Total Cost Budget) to update the Sponsor Direct amount. Select "CBU" to update the Cost Sharing Budget. Make sure to also check the Cost Sharing Checkbox described below.
<b>Budget Item and ChartFields</b>	The Budget Item(s) ChartField values you enter vary depending on the agency and Budget Item (activity). Available ChartFields include Fund, Appropriation ID, Account, Subaccount, Agency Cost 1 and 2, Activity, Category and Subcategory.
<b>*Source Type</b>	Select "BUD" the default for Budget Transactions.

8. Enter the following on the **Grants Detail** tab.

Field Name	Field Description
<b>Cost Sharing Checkbox</b>	The Cost Sharing Checkbox should be checked if this row relates to a Cost Share amount.
<b>Facilities &amp; Administration</b>	The Facilities & Administration checkbox should not be checked. <b>Note:</b> This box is only used by agencies who have consulted with the SWIFT Module Support Unit (AgencyAssistance.MMB@state.mn.us) and are setup to have the F & A process run centrally.

9. On the Commitment Control tab, verify the **Build Parent Budget Checkbox** is selected. Other fields are display only.

10. Select the **Save** button.

11. If budget entries are correct, select the **Finalize** button.

**Budget Detail**

Project: G02FSDDC230 State Developmental Disabiliti

Budget Period: 1 Begin Date: 10/01/2022 End Date: 09/30/2024

**Finalize** Process Monitor

**Project Budget Summary**

Cost Share Direct: \$0.00 Currency: USD Total Budget: \$1,174,767.00

Sponsor Budget: \$1,174,767.00 Security Status: None

**Budget Amounts for Period**

Fund Code	Financial Department ID	Appropriation ID (CF3)	Activity	Analysis Type	Source Type	Budget Item	Quantity	Amount	Commitment Control Status	Journal ID
3000	G0231061	G021362	2300	BUD	BUD	ALL	1.00	80,000.00	Distributed	0271547457
3000	G0231061	G021362	2301	BUD	BUD	ALL	1.00	-10,000.00	None	

12. A message display indicating that Budget Finalization has been processed and to select the Process Monitor hyperlink. Select the **OK** button.

**Budget Finalization has been processed. (13100,707)**  
Click on the **Process Monitor** hyperlink to view run status.

**OK**

13. You are returned to the Budget Detail page. Select the **Process Monitor** link.

**Budget Detail**

Project: G02FSDDC230 State Developmental Disabiliti

Budget Period: 1 Begin Date: 10/01/2022 End Date: 09/30/2024

**Finalize** **Process Monitor**

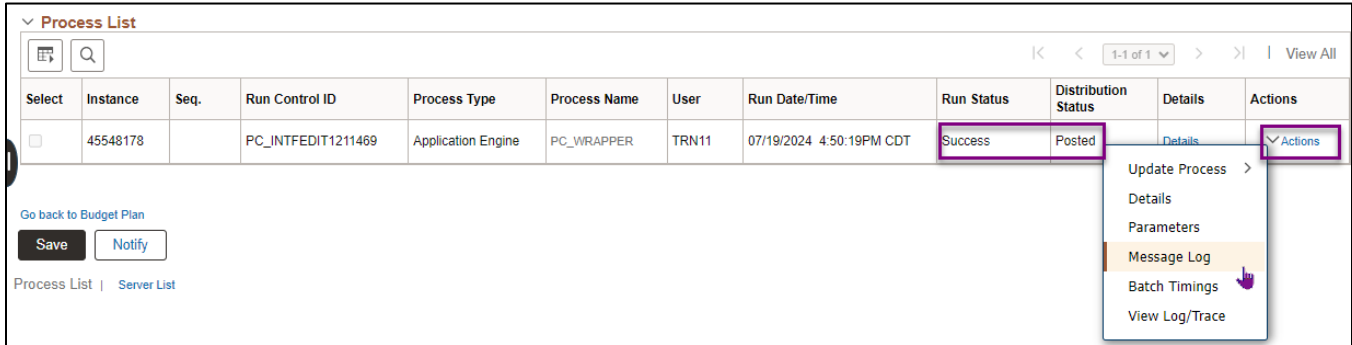
**Project Budget Summary**

Cost Share Direct: \$0.00 Currency: USD Total Budget: \$1,184,767.00

Sponsor Budget: \$1,184,767.00 Security Status: None

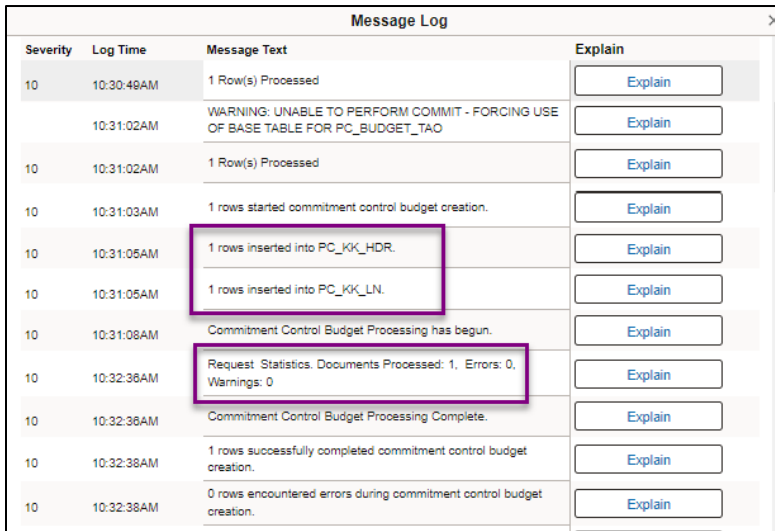
14. At the Process List page, select the **Refresh** button until the Run Status = Success and the Distribution Status = Posted.

15. You must access the Message Log to ensure that the process was successful. Select the **Actions** drop-down list and select “Message Log.”



16. The Message Log window displays. Review the information.

- a. You should see messages indicating that rows have been successfully inserted into the “PC” Project Costing and Commitment Control modules. Make sure the number of rows listed equal the number of Budget Items you are processing.
- b. You may see numerous warning messages that you can ignore.



## Step 2: Verify the Project Budget on the Award Profile Page

1. Navigate to the **Award Profile** page using one of the options below:

Navigation Options	Navigation Path
<b>Navigation Collection</b>	Accounting, Grants Management, Manage Awards. The Award Profile page displays by default.
<b>WorkCenter</b>	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Maintain Award, Award Profile.

2. Search for and select the award you want to work with.
3. The Award Profile page displays. Select the **Funding** tab.

The screenshot shows the 'Award Profile' page with the 'Funding' tab highlighted in a purple box. The page contains various input fields and dropdown menus for award details. The 'Award ID' is 0000009196. The 'Title' is 'State Developmental Disabilities Councils'. The 'Long Description' is 'State Developmental Disabilities Councils'. The 'Award PI' is 'US Department of Health & Human Services'. The 'Sponsor' is 'US Department of Health & Human Services'. The 'Award Type' is 'Grant'. The 'CFDA' is '93.630'. The 'Proposal ID' is '0000009196'. The 'Version ID' is 'V101'. The 'Start Date' is '10/01/2022' and the 'End Date' is '09/30/2024'.

4. Verify that the **Funded Amount** reflects the budget adjustment you just made.

The screenshot shows the 'Award Profile' page with the 'Funding' tab selected. The 'Total Award Amount' is 1,174,767.00. The 'Funding Info' section shows the 'Project' as 'G02FSDDC230' and the 'Project PI' as 'Wieck, Colleen A'. The 'Detail' section contains a table with the following data:

Period	*Start Date	*End Date	Funded Amount	To Project ID	Budget Posting Status	PC Distribution Status	Attachment
1	10/01/2022	09/30/2024	1,174,767.00	G02FSDDC230	Posted	Distributed	Attachments

5. Select the **Award** tab to return to the Award Profile page.
6. You should also use the Budget Overview page to ensure that the updated project budget displays in Commitment Control. Refer to the [View Budget Overview Inquiry](#) guide for assistance. (**TIP:** Open a new window or perform this step after completing the upcoming steps.)

### Step 3: Enter Contract Amendment

Since the contract is in “Active” status, you need to enter a contract amendment, update the Total Billing Limit amount, and then process the amendment.

**Note:** You must complete these steps in this order. If you process the amendment before updating the Billing Limit Amount, you may get an error message.

1. On the Award tab of the Award Profile for the project, select the **View Contract** link located above the Associated Project section.
2. The General page displays for the Contract. Note the current **Contract Status** and **Amendment Number**.
3. Select the **Amend Contract** button (button available on all pages for the contract).

Contract Number 000009196 Sold To Customer US Department of Health & Human Services

Amendment Number 000000002 \*Contract Status ACTIVE

Amend Contract Add to My Contracts

Description State Developmental Disabiliti Processing Status Active

4. On the Amendments page, a new row displays on the General tab in the Amendments section. Select the “Change Funding” option from the drop-down list in the **Amendment Type** column.
5. Select either “Add Money to Grant” or “Reduce Money” option from the drop-down list in the **Reason** column.
6. The **Process Date** defaults to the current date. Select the **Save** button. A new amendment has been created in a “Pending” status.

Contract Number 000009196 Sold To Customer US Department of Health & Human Services

Pending Amendment 000000003 Contract Status ACTIVE

View Current

**Amendments**

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000002	Change Funding	Reduce Money	11/08/2023	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000001	Change Funding	Add money to grant	06/26/2023	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000000	Contract Activation		06/26/2023	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000003	Change Funding	Reduce Money	07/30/2024	Pending	<a href="#">Detail</a>	<a href="#">Notes</a>

Save Return to Search Notify

## Step 4: Update the Billing Limit

Now that you have a pending amendment on the contract, you can go to the Contract Terms page and edit the New Billing Limit.

1. Select the **Details** link for the pending amendment number you just created.

Amendments						
<span>Grid</span> <span>Search</span> <span style="float: right;">1-4 of 4</span> <span style="float: right;">View All</span>						
<span>General</span> <span>Statistics</span> <span>Billing Amended Amounts</span> <span>Revenue Amended Amounts</span> <span>Misc.</span>						
Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000003	Change Funding	Reduce Money	07/30/2024	Pending	<a href="#">Detail</a>	Notes

2. On the Amendment Details page, enter the **Total Billing Adjustment**.
3. Select the **Save** button.
4. Select the **Amendment Amount Allocation** link at the bottom of the page.

**Amendment Details**

Contract 0000009198 Amendment Number 0000000003  
 Sold To Customer GMG0200001

Amendment Type Change Funding \*Process Date 07/30/2024  
 Amendment Reason Reduce Money \*Amendment Status Pending

Total Billing Adjustment -10,000.00 Total Revenue Adjustment -10,000.00  
 Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00  
 Fixed Billing Allocation Incomplete Fixed Revenue Allocation Incomplete

**Additional Amendment Details**

Reference ID User Ref #1 User Ref #2

**Amendment Components**

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1					

Amendment Amount Allocation [Return to General Information](#) Internal Notes

**Save** [Return to Search](#) [Notify](#)

5. In the Contract Line Pricing section, enter the **New Billing Limit**.
6. Select the **Recalculate** button.
7. Select the **Save** button.
8. Select the **Return to Amendment Details** link at the bottom of the page.

Contract Line Pricing

Retrieve Billing Price	Line Number	Product	Current Billing Limit	New Billing Limit	Adjustment Billing Limit	Limit Check
<input type="checkbox"/>	1	GRANTS_REIMBURSABL	1,184,767.00	1,174,767.00	-10,000.00	Limit Check

Select All     Clear All   

Adjustment Line Totals

Billing Amount	0.00	Recurring Billing	0.00		
Discounts/Surcharges	0.00	Billing Limit	-10,000.00	Total Billing	-10,000.00

## Step 5: Process the Contract Amendment

1. On the Amendment Details page, verify that the **Amendment Type** and **Amendment Reason** are correct. You can change them on this page, if necessary.
2. Select "Ready" in the drop-down list for **\*Amendment Status**.

**Amendment Details**

Contract 0000009198      Amendment Number 0000000003

Sold To Customer GMG0200001

Amendment Type     \*Process Date 07/30/2024  
 Amendment Reason     \*Amendment Status

Total Billing Adjustment     Fixed Revenue Adjustment   
 Fixed Billing Adjustment     Fixed Revenue Allocation

Fixed Billing Allocation

> Additional Amendment Details

**Note:** When you change the Amendment status to "Ready" SWIFT locks the editable fields on the page, including the Type and Reason, and the **Process Amendment** button displays. If you realize there is an error, you can fix it by changing the Amendment status back to "Pending." After you select the **Process Amendment** button in the next step, you cannot to make changes to this amendment. You must create a new amendment to make further changes or undo what you have done.



3. Select the **Process Amendment** button.

**Amendment Details**

Contract 0000009196	Amendment Number 000000003
Sold To Customer GMG0200001	
Amendment Type Change Funding	Process Date 07/30/2024
Amendment Reason Reduce Money	*Amendment Status <span style="border: 1px solid gray; padding: 2px;">Ready</span>
<span style="border: 2px solid purple; padding: 5px 15px; display: inline-block;">Process Amendment</span>	
Total Billing Adjustment -10,000.00	Total Revenue Adjustment -10,000.00
Fixed Billing Adjustment 0.00	Fixed Revenue Adjustment 0.00
Fixed Billing Allocation Incomplete	Fixed Revenue Allocation Incomplete

4. Notice “Complete” for the **Amendment Status**.

5. Select the **Return to General Information** link at the bottom of the page to return to the Amendments tab of the Contract.

**Amendment Details**

Contract 0000009196	Amendment Number 000000007
Sold To Customer GMG0200001	Amendment Completed On 07/30/2024 2:33PM
Amendment Type Change Funding	Process Date 07/30/2024
Amendment Reason Reduce Money	Amendment Status Complete
Total Billing Adjustment -10,000.00	Total Revenue Adjustment -10,000.00
Fixed Billing Adjustment 0.00	Fixed Revenue Adjustment 0.00
Fixed Billing Allocation Complete	Fixed Revenue Allocation Complete

> Additional Amendment Details

Reference ID	User Ref #1
	User Ref #2

**Amendment Components**

⌵ 🔍 1-2 of 2 View All

	Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1	Amount Allocation	Line 1	Billing Limit	Update	1164787	1154787
2	Amount Allocation	Line 1	Revenue Limit	Update	1164787	1154787

Internal Notes

Return to General Information ←

Save
Return to Search
Notify

## Step 6: Add a Contract Note

1. Add a contract note to describe the change you made. Select the **Notes** link for the amendment.

Amendments						
Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000003	Change Funding	Reduce Money	07/30/2024	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>
0000000002	Change Funding	Reduce Money	11/08/2023	Complete	<a href="#">Detail</a>	<a href="#">Notes</a>

2. Complete the **Notes** page as described below:

Field Name	Field Description
*Component	Select "Amendments."
*Amendment Number	Select the <b>Lookup</b> and select the Amendment Number you created.
*Classification	Select "Custom."
*Text	Enter a note describing the change you made.

3. Select the **Save** button.
4. Select the **Return to General Information** link at the bottom of the page.

**Notes**

Contract 0000009196 Business Unit G0201  
 Sold To Customer GMG0200001 Contract Status ACTIVE  
 US Department of Health & Human Services Currency Code USD  
 Contract Admin

**Notes Contents** | 1 of 1 | View All

\*Component: Amendments  
 \*Classification: Custom  
 Amendment Number: 0000000003  
 Note Type: [Search]  
 Text: Reduce grant budget  
 235 characters remaining  
 Last Update: 11/08/23 2:02PM Last Changed By: 01108622

[Return to General Information](#) | **Save** | [Return to Search](#) | [Notify](#) | [Add](#)

5. You are returned to the Amendments tab of the Contract pages. Select the **General** tab.
6. Verify that the updated Billing Amounts can be viewed in the **Summary of Amounts** section of the General Information page.

Summary of Amounts

Billing Amounts		Revenue Amounts	
Fixed Billing	0.00	Fixed Revenue	0.00
Discounts/Surcharges	0.00	Discounts/Surcharges	0.00
Non-inclusive Prepays	0.00	Non inclusive Prepays	0.00
Subtotal	0.00	Subtotal	0.00
As Incurred Billing Limits (Less Prepaid)	1,174,767.00	As Incurred Revenue Limits (Less Prepaid)	1,174,767.00
Recurring Billing	0.00	Recurring Revenue	0.00
<b>Total</b>	<b>1,174,767.00</b>	<b>Total</b>	<b>1,174,767.00</b>

7. The updated **Billing Limit** can also be viewed on the Lines tab on the **Billing Amount Details** tab of the Contract Lines section.

General **Lines** Amendments

Contract Number 0000009196 Sold To Customer US Department of Health & Human Services  
 Amendment Number 0000000005 Contract Status ACTIVE

Amend Contract

Contract Lines

General Detail **Billing Amount Details** Revenue Amount Details

Actions	Line	Product	Description	Price Type	Quantity	UOM	Billing Limit	Unit Billing
Actions	1	GRANTS_REIMBURSABL	Grants Reimbursable	Rate	1.0000		1,174,767.00	1,174,767.00