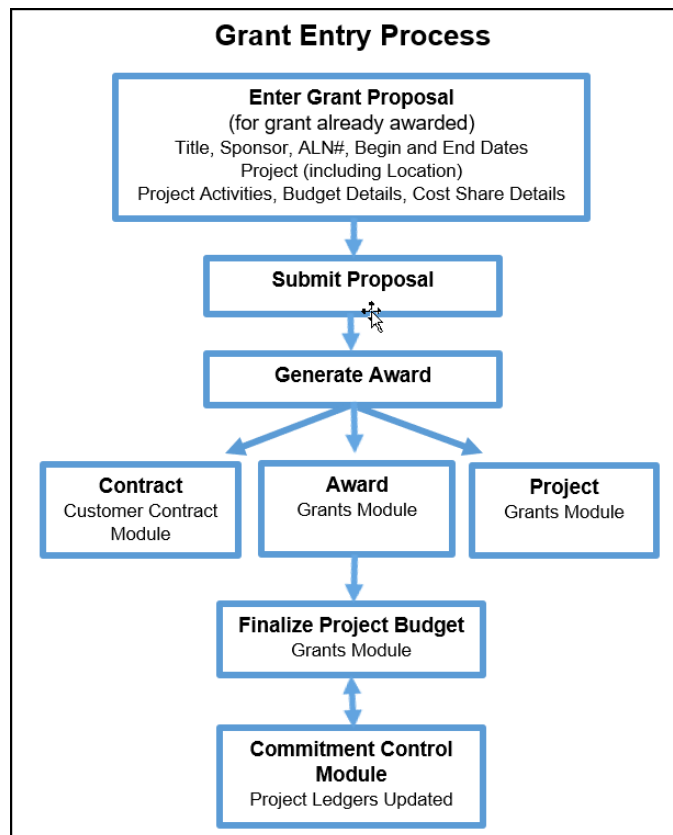


Enter Grant Proposals

Overview

The State of Minnesota uses the Proposal component of the Grants module to document awards that have already been granted by an outside organization, including federal government agencies, other state agencies, and non-profit groups.

In this guide we demonstrate how to enter grant awards in the Grant Module. Although the award has already been granted, you begin by entering information into the Proposal component. The proposal is used to track information about the grant, including the title, award sponsor (Grantor), timeline, the Assistance Listing Number (ALN), budget, any cost share, and other information that is used later for transactions. You also need to identify at least one project and budget activity for the grant that can track costs when the proposal is awarded in the system. The level of budget detail entered differs, depending on the agency. For example, some agencies enter a single budget for the entire project, while other agencies enter budget amounts at the account class level, such as salary, equipment, and travel.



After the entries are complete, you submit the proposal. This is a system requirement that must be performed even though the grant has been awarded.

Pre-Award Costs: If pre-award costs have been approved, contact the SWIFT Helpdesk to discuss the options available to include these costs in your project. Options may differ depending on whether SEMA4 transactions are involved.

Next, you generate the award. Based on your entries in the proposal, the Generate Award process creates an award, project, and activity in the Grants module, as well as a contract in the Customer Contracts module. From this point on, you can no longer update the proposal. Use these pages to make any future changes.

After you have generated the award, the next step is to finalize the project budget. Review budget information that defaulted from the proposal and enter any additional ChartFields according to your agency’s requirements. Next, you finalize the budget. Finalizing the project budget creates the project budget by sending the data to Commitment Control module. If the process is successful, grant expense transactions can be processed against the project budget. If the process is unsuccessful, you must view errors on the Commitment Control Errors page and correct the entries.

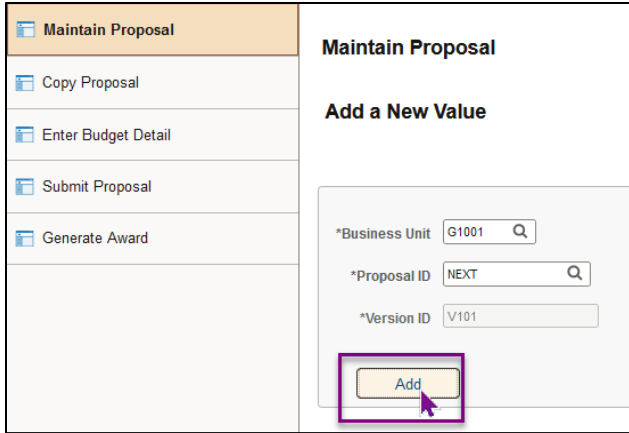
After finalizing the project budget, update the necessary fields within the Customer Contract. This includes activating the contract and optionally, placing the billing and revenue plans on hold.

Step 1: Create a New Grant Proposal

1. Navigate to the **Maintain Proposal** page using one of the options below:

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Proposals. The Maintain Proposal page displays by default.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Create New Award, Maintain Proposal.

2. Select the **Add a New Value** button.
3. Verify the Business Unit default or enter the Business Unit.
4. Enter your own Proposal ID or accept the default “NEXT” in the Proposal ID field and SWIFT automatically assigns a system-generated ID after you save the Proposal. This value becomes the Award ID and Customer Contract Number.
5. Accept the default Version ID “V101.”
6. Select the **Add** button.



7. The **Proposal** page displays. Enter Proposal header information as described below.

Field	Field Description
Description	Optionally, enter a short Description for your proposal. If no value is entered, SWIFT defaults the Description to the first 20 characters of the Title field (see below). The field length is 20 characters.
Reference Award Number	Enter the Reference Award Number. This number is provided by the sponsor to reference the award in the federal system. It can be used to identify the source for draws.
Federal Award Identification Number	Enter the Federal Award Identification Number (FAIN).
*Title	Enter the Title for the proposal. This carries over to the Title field on the Award Profile and is how the award appears on reports. The field length is 56 characters.
Long Description	Optionally, enter a Long Description. The field provides an opportunity to provide more details about the proposal. This is not a required field and would generally be used for informational purposes only. The field length is 254 characters.
*PI ID	Select the Lookup icon and select the Employee ID for the PI ID. This is the Principal Investigator for the project. The Principal Investigator is generally the contact person for the program that the grant is funding, although some agencies also use the grant accountant. This field is required by the system and is generally left to the agency’s discretion to fit its reporting requirements. If you need to have someone added as a valid entry for this field, please email the employee’s name and their employee ID to AgencyAssistance.MMB@state.mn.us .
*Sponsor ID	<ul style="list-style-type: none"> Select the Lookup icon and select the Sponsor ID. This is the entity that is funding your project. It could be a federal agency, another state agency, or an outside organization, such as a non-profit. Generally, Sponsor IDs start with the letters “GM” followed by the first three digits of your Business Unit. This is

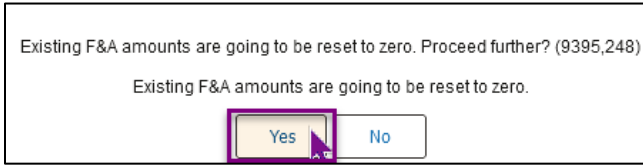
Field	Field Description
	<p>also known as your “Agency Mask.” For example, if your agency is H5502, your Sponsor IDs would typically look like “GMH55XXXXX.”</p> <ul style="list-style-type: none"> Sponsor IDs are 10 alphanumeric characters long. If you need to add a new Sponsor ID, please email AgencyAssistance.MMB@state.mn.us.
*Proposal Type	Accept the default Type of “New.”
*ALN (Required if Sponsor is a Federal Agency)	<ul style="list-style-type: none"> If your sponsor is a federal agency, you must enter the ALN in the proposal. If your sponsor is not a federal agency, do not enter an ALN. The ALN is a unique number, formally known as the CFDA Number, assigned to a program or activity within the Assistance Listings. The first two digits identify the federal agency that administers the assistance. Only one ALN is allowed per grant. To have a new ALN added to the system, please email the pertinent information to please email AgencyAssistance.MMB@state.mn.us.
*Proposal Status	<p>Accept the default of “Draft” in the Proposal Status. This field is updated automatically to “Submitted” and “Awarded” as the grant proposal is processed in the upcoming steps. You should not change the Proposal Status on this page unless you want to prevent the grant proposal from processing. In this case, you can change the status to “Withdrawn” or “Rejected.”</p>
*Facilities & Admin Requested	<p>Uncheck the Facilities & Admin Requested (F & A) checkbox. Note: 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.</p>

The screenshot shows the 'Proposal' form in the SWIFT system. The following fields are highlighted with purple boxes:

- Proposal ID: NEXT
- Description: FEMA
- Reference Award Number: 0000009186
- Federal Award Identification Number: P0756981
- *Title: FEMA Training
- *PI ID: [Searchable]
- *Sponsor ID: P070100001 PUBLIC SAFETY DEPT
- *Proposal Type: New
- CFDA: 97.039
- *Proposal Status: Draft
- Facilities & Admin Requested: [Unchecked]

Other visible fields include: Version ID (V101), Currency (USD), Add to My Proposals button, Long Description (254 characters remaining), Pre-Award Administrator, Purpose, Submit Status (Not Submitted), Generate Status (Not Generated), In Approval Process checkbox, Foreign Application/Component checkbox, and NIH Modular Grant checkbox.

- After unchecking the **Facilities & Admin Requested** checkbox, a message displays indicating that existing F & A amounts are going to be reset to zero. Select the **Yes** button.

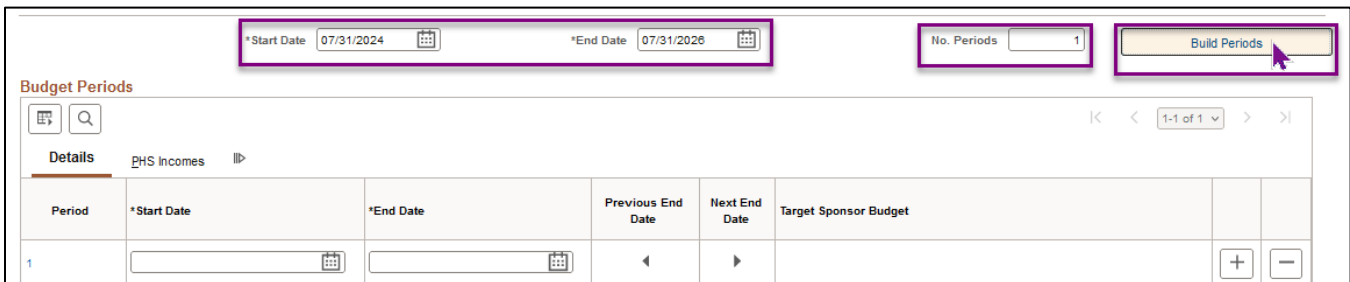


- Enter values in the ***Start Date**, ***End Date** and **No. Period** fields as described below.

WARNING! The Start and End Dates and Budget Dates are very important because they become the start and end dates of the project, award, and contract. The Start Date also impacts the initial Project Status Effective Date which affects payroll processing and cannot be changed once the award is generated.

Field Name	Field Description
*Start Date	The Start Date for the project, award, and contract. You can create a proposal with a Start Date prior to the current date. If you are entering a proposal on March 15 for a project that started on March 1 per the grant award, enter the actual Start Date of March 1.
*End Date	The End Date for the project, award, and contract.
*No. Periods	Enter "1" in the No. Periods field. This is the only value used by the State of Minnesota.

- Select the **Build Periods** button.



- Budget Period Start and End Dates that match the proposal dates are automatically entered in the **Budget Periods** section. The Start Date and End Dates are grayed out and unavailable.
- If you make a mistake entering the Start and End Dates after selecting the **Build Periods** button, select the **Delete (-)** button to remove the built dates in the Budget Period section.
 - Select **OK** at the message verifying that you want to delete the record.
 - The Start and End Dates become editable again. Enter corrected Start and End Dates, No. Periods, and select the **Build Periods** button again.

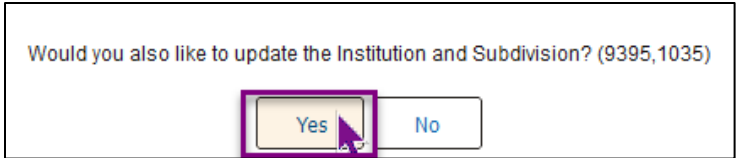
Step 2: Enter the Proposal Project

After completing the proposal header, you must create the project that the award is funding. If you submit the proposal without a project, you cannot add one later. You can add a second project later after the award has been generated.

1. Select the **Project** tab and complete the fields as described below.

Field Name	Field Description
*Project ID	<ul style="list-style-type: none"> You must overwrite the default system value (NEXT_1) with a valid Project ID. Project IDs must begin with the first three characters of your Business Unit. This is also known as your "Agency Mask." For example, if your Business Unit is H5502, then your Agency Mask is "H55." Check with your agency for additional format requirements for the Project ID. Project ID is a 15-character alphanumeric identifier.
*Primary	The Primary checkbox is checked by default for the first project you enter. One project must be designated the Primary project.
*Project Type	Enter the Project Type. Select the option that describes the source of funding and how the revenue is classified. Available options vary by agency. Common options include: <ul style="list-style-type: none"> FED – 511001 Federal Revenue FEDSG– 511002 Federal Sub-Grants INTR1– 511101 Intergovtl Grants -- State INTR2– 511202 Intergovtl Grants – Other INTR3– 512605 Interagency Agreements OTHER– 511302 Other Revenue PRIVT– 511301 Private Grants Note: If you need a new project type setup, please contact the SWIFT Helpdesk.
*Title	Enter the Project Title. This can be the same or different from the Proposal Title.
Long Description	Optionally, enter a Long Description. This may be the same or different than the Long Description for the Proposal.

2. Enter the Financial Department ID in the ***Department** field. Check your agency’s convention to determine which Financial Department ID to enter for the Department.
3. A message displays asking if you would also like to edit the Institution and Subdivision fields. Select the **Yes** button.



Note: You may receive an error after entering the Department indicating that the Department is not valid. In this case, leave the Department number in the field and, after you enter the Subdivision, the error should be resolved.

4. Select the **Lookup** icon and choose the appropriate option for ***Subdivision**.
5. Select the **Lookup** icon and choose the appropriate option for ***Institution**.
6. The **F & A Distribution** section is only used by agencies who have consulted with the SWIFT Module Support Unit (AgencyAssistance.MMB@state.mn.us) and are setup to have F & A processing run centrally. Agencies who do not have F & A processed centrally should accept the default entries in the **F & A Distribution** section.

Proposal ID NEXT
Version ID V101

Description FEMA Training
Currency USD

Proposal Projects 1 of 1 | View All

Project ID: G10FEMATRNG Primary

*Title: FEMA Training

Long Description:
 254 characters remaining

*Project Type: FED

*Department: G1010000 Minnesota Management & Budget

*Subdivision: G1000000 Mn Management & Budget

*Institution: G10 MN Management and Budget

Dept Contact:

Dept Rep:

[Other Contacts](#)

[Department Credit](#)

SPO SPO Contact

F & A Distribution 1-1 of 1

*Financial Department ID	Description	Location	Comments	Percent Share
G1010000	Minnesota Management & Budget			100.00

Project Percent Share: 100.00

Go To: **Location** Protocols Component Setup Level Keywords Gender & Minority Study Trainee Attributes

Return To: [My Proposals](#)

Proposal | Projects | Budgets | Resources | Certifications | Reports | Attachments

Step 3: Enter the Proposal Project Location

1. Select the **Location** link at the bottom of the page in the **Go To** section.
2. The Location page displays. Select the **Lookup** icon and select the primary Location for your project. This may be an administrative location or the physical location where the project is taking place.

Step 4: Enter the Proposal Project Budget and Save

1. Select the **Budgets** tab and complete the fields as described below.

Field Name	Field Description
*Budget ID	Enter the Budget ID for your project. This becomes the Activity ChartField value. Be sure to follow your agency’s convention for completing this field.
*Description	Enter the Budget ID Description. This is a description of the activity. It should be something that clearly describes the activity. Some agencies have specific formats for the Description. Check to make sure you are following your agency’s conventions.
Include in Proposal	Accept the default of checked for the Include in Proposal.

2. If your project has multiple activities, select the **Add New Row (+)** button to add additional row(s). Enter the information as described above. These additional Activity IDs are associated to the project.

- After verifying that you have entered the correct information for your proposal, select the **Save** button. You must save your proposal at this point before continuing to enter Budget Details.

The screenshot shows the 'Proposal Project' interface. At the top, the Project ID is G10FEMATRAINING. The Budget Header section includes fields for Budget ID (1), Description (All), Start Date (08/01/2024), and End Date (08/31/2026). There are '+' and '-' buttons next to the Description field and a checked 'Include in Proposal' checkbox. Below this is the Budget Period section, which contains a table with columns for Period, Start Date, End Date, Amount, Program Income, and Number of Participant/Trainees. The table has one row with Period 1 and Program Income set to 'Program Income'. At the bottom, there are navigation buttons: 'Save' (highlighted), 'Notify', 'Refresh', 'Add', and 'Update/Display'.

WARNING! Once you save the proposal, you cannot change the Project ID. Verify that your Project ID starts with your Agency Mask. If not, navigate to the Projects Tab of the Maintain Proposal pages and update the Project ID field with a value that is in the correct format.

- SWIFT enters the Start Date and End Date for your Budget Period. If you accepted "NEXT" for the Proposal ID, SWIFT assigns a Proposal ID.

This screenshot shows the 'Proposal Project' interface with a generated Proposal ID. At the top, the Proposal ID is 000009788, Version ID is V101, and Description is FEMA Training. The Budget Header section shows Budget ID (1), Description (Admin and In-State Travel), Start Date (07/31/2024), and End Date (07/31/2026). The 'Include in Proposal' checkbox is checked. The Budget Period table has one row with Period 1, Start Date 07/31/2024, End Date 07/31/2026, and Program Income set to 'Program Income'. The 'Save' button is highlighted.

Note: It is a good idea to note the Project and Proposal ID to facilitate finding the proposal later.

Step 5: Enter the Proposal Project Budget Details

Enter budget line details for each Budget ID (Activity). The level of detail entered by agencies differs depending on the agency’s project budget requirements. Be aware that you cannot delete or change a proposal project after creating the budget details.

SWIFT uses the budget detail amounts that you enter to create the resulting contract and reimbursable funding amounts on the award pages. If you do not enter budget details before you run the award generation process, then you must enter the information manually in both Grants and Contracts.

The Budget Item selected defaults budget ChartField strings once the proposal is awarded and run through the Generate Award process in SWIFT.

1. In the **Budget Period** subsection for the Budget Header, select the **Period** link.

Budget Period					
Period	Start Date	End Date	Amount	Program Income	Number of Participant/Trainees
1	08/05/2024	07/31/2026		Program Income	

2. The **Enter Budget Detail** page displays. Budget activities are listed on the **Line Data** tab. The Line # (Budget ID) is automatically assigned.
3. Select the **Lookup** icon and select the **Budget Item**. The **Description** automatically displays. Available options vary depending on your agency.
4. Enter the **Total Direct** amount.
5. Optionally, if there is Cost Share for the Budget Item, select the **Cost Share** link. Cost Share is entered when the sponsor funds a portion of the total project amount and the agency or third party funds the rest. Cost Share documents the proportion of cost sharing responsibility.

Enter Budget Detail										
Proposal 0000009950			Currency USD		Version V101			Start Date 07/01/2024		End Date 07/31/2026
Title FEMA Training			<input type="checkbox"/> Modular?							
Project ID 00000000001050			Budget Period 1		Start Date 07/01/2024			End Date 07/31/2026		Overall Cost Share
Budget ID 1										
Details, CostShare, Justification										
Line Data More Line Data										
Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share	
10	ALL	All Budget Items		132,000.00	132,000.00	Cost Share	<input type="checkbox"/>			+ -

- The Cost Share window displays. Enter cost information in the **Cost Sharing** section. You can choose to enter either the **Cost Share Percent**, **Sponsor Direct**, or **Cost Share Direct**. SWIFT calculates the other values based on your entry.

Cost Share

Budget Period 1 Start Date 07/01/2024 End Date 07/31/2026
 Budget Line Number 10 Budget Item ALL All Budget Items

Cost Sharing

Total Direct	132,000.00	Cost Share Percent	80.00
Sponsor Direct	26,400.00	Cost Share Direct	105,600.00

Cost Sharing Distribution

- In the **Cost Sharing Distribution** section, enter cost sharing information for either the Institution (agency) or Third Party (outside organization) depending on which is responsible.
 - If it is your agency, use the **Lookup** icon and select the **Financial Department ID**. Enter either the **C/S Pct** (percentage department is responsible for) or enter **C/S Direct** amount (dollar amount the department is responsible for). SWIFT calculates the other value based on your entry.
 - If a Third Party is responsible for a part of the Cost Share, you can enter the information in the **Third Party section** by entering a **Description**, **C/S percent** or **C/S Direct** amount.
- After entering all Cost Share information, select the **OK** button. The **Distribution Totals** amount must equal 100 percent.

Cost Share

Budget Period 1 Start Date 07/01/2024 End Date 07/31/2026
 Budget Line Number 10 Budget Item ALL All Budget Items

Cost Sharing

Total Direct	132,000.00	Cost Share Percent	20.00
Sponsor Direct	105,600.00	Cost Share Direct	26,400.00

Cost Sharing Distribution

Institution

*Financial Department ID Mn Management & Budget C/S Pct C/S Direct + -

Third Party

Description C/S Pct C/S Direct + -

Distribution Totals

OK

- You are returned to the **Enter Budget Detail** page. If you need to enter additional Budget Items, select the **Add New Row (+)** button to enter additional row(s) with the appropriate information as previously described.

Enter Budget Detail

Proposal 0000009950 Currency USD
 Version V101 Start Date 07/01/2024 End Date 07/31/2026
 Title FEMA Training Modular?

Project ID 00000000001050 Budget Period 1
 Budget ID 1 Start Date 07/01/2024 End Date 07/31/2026

Details, CostShare, Justification

Line Data More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	ALL	All Budget Items		132,000.00	105,600.00	Cost Share	<input type="checkbox"/>	26,400.00	

- When you are finished entering budget amounts for Budget Items, select the **Save** button.
- After all budget details have been entered, the budget breakdown is displayed at the bottom of the **Enter Budget Detail** page. Select the **Return to Maintain Proposal** link at the bottom of the page to return to the Proposal pages.

Enter Budget Detail

Proposal 0000009950 Currency USD
 Version V101 Start Date 07/01/2024 End Date 07/31/2026
 Title FEMA Training Modular?

Project ID 00000000001050 Budget Period 1
 Budget ID 1 Start Date 07/01/2024 End Date 07/31/2026

Details, CostShare, Justification

Line Data More Line Data

Line #	Budget Item	Description	Details	Total Direct	Sponsor Direct	Cost Share	Mandatory Cost share	Institution Cost Share	Third Party Cost Share
10	ALL	All Budget Items		132,000.00	105,600.00	Cost Share	<input type="checkbox"/>	26,400.00	

Sponsor Direct	105,600.00	Sponsor F&A	0.00	Total Sponsor Budget	105,600.00
Institution Cost Share	26,400.00	Institution Cost Share F&A	0.00	Total Inst C/S Budget	26,400.00
Third Party Cost Share	0.00			Total TP C/S Budget	0.00
Total Direct	132,000.00	Total F&A	0.00	Total Budget	132,000.00

[Return To Maintain Proposal](#)

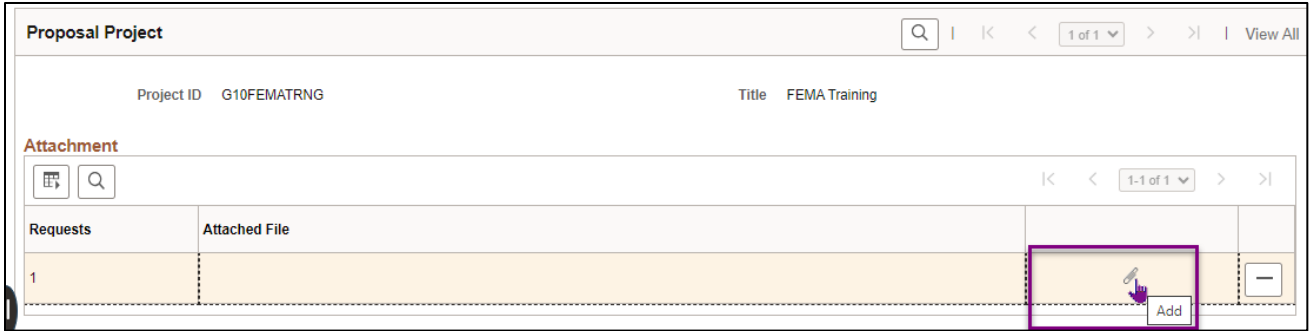
Save

WARNING! Unless your agency budgets by a ChartField that differentiates the sponsor-direct budget from the cost-share budget (such as Fund), there is not different project budget for each portion. However, the Contract Limit for reimbursement only includes the Sponsor Direct portion of the budget and controls the amount that can be billed to the sponsor.

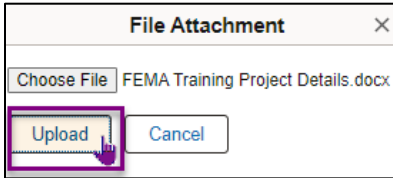
Step 6: Optionally Attach Files to the Proposal

You can use the Attachments page to attach grant documents to the proposal, if desired.

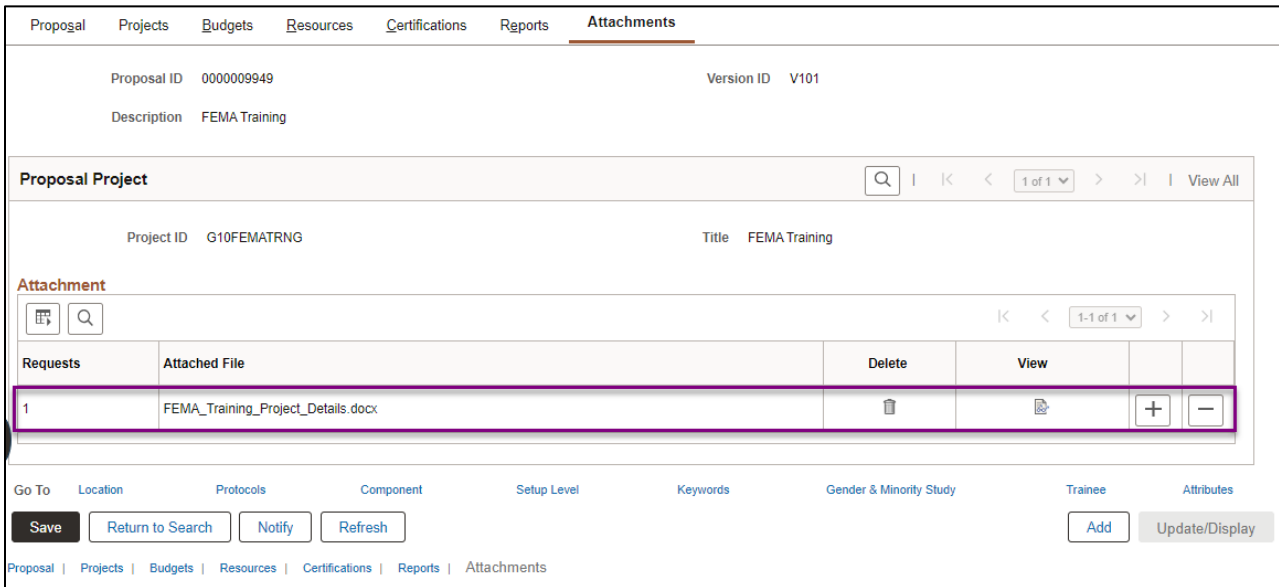
- Select the **Attachments** tab.
- Select the **Paperclip** icon in the Attachment section.



3. The File Attachment window displays. Select the **Browse** button and find the file that you want to upload.
4. Select the **Open** button.
5. Select the **Upload** button.



6. The Attachments tab displays showing the file attached. Optionally, select the **Add New Row (+)** button to add additional attachments.
7. You can select the **View** icon to view the attachment or select the **Delete** (trashcan) icon to remove the file attachment.



Note: Attachment(s) that you add to the proposal can also be found on your project after the award has been generated. To see the attachment, look up the Project General Information page for your primary project and view the **Attachments** tab.

Step 7: Submit the Proposal

You must submit the proposal before you can generate the award documents. Before submitting your proposal, review the proposal information to ensure it is correct.

WARNING! Verify that the Project ID must begin with your Agency Mask. If not, you must go back to the Maintain Proposal pages and either 1) withdraw the proposal and start over; or 2) add an additional project to the proposal and designate it as the primary project with a corresponding Budget and Location as outlined in the preceding steps.

1. Navigate to the **Submit Proposal** page using one of the options below.

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Proposals, left menu, Submit Proposal.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Create New Award, Submit Proposal.

2. On the Submit Proposal search page, verify the Business Unit and enter additional search criteria, such as the Proposal ID.
3. Select the **Search** button.
4. Select the **Proposal ID** in the Search Results section. The Submission page displays.
5. Select “Submitted” from the Submit Status drop-down list.

Submission Official

Proposal ID 0000009949 Title FEMA Training
 Version ID V101 PI Name Marah,Jane Lana

Proposal Status Draft *Submit Status Not Submitted
 Proposal Valid From Not Submitted
 Received Submitted
 Sponsor Proposal ID Transmission By

Sponsor PUBLIC SAFETY DEPT
 Location

Submitted On

6. Select the **Save** button. The Proposal Status changes to “Submitted” and a date/time stamp is displayed.

Submission
Official

Proposal ID 0000009949

Version ID V101

Title FEMA Training

PI Name Marah, Jane Lana

Proposal Status Submitted

Proposal Valid From

Received

Sponsor Proposal ID

Sponsor PUBLIC SAFETY DEPT

Location

*Submit Status Submitted

Proposal Valid To

Transmission By

Submitted On 08/05/2024 1:22:22PM

[Return To Maintain Proposal](#)

Save
Return to Search
Notify

Submission
Official

Step 8: Generate the Award

After submitting the proposal, you can now generate the award based on the proposal information. When you generate an award, all active records necessary to process transactions against the award are created, including the Award Profile, Customer Contract with Sponsor, and Project and Activity.

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

Navigation Options	Navigation Path
Navigation Collection	Accounting, Grants Management, Manage Proposals, left menu, Generate Award.
WorkCenter	Accounting, Grants Management, Grants WorkCenter, left menu, Links section, Create New Award, Generate Award.

2. Verify your Business Unit or enter a Business Unit.
3. Enter additional search criteria, such as the Proposal ID.
4. Select the **Search** button.
5. Select the Proposal ID in the **Search Results** section.
6. The Generate Award page displays. Verify that the **From Proposal** and **To Award** values match.
7. If you have more than one project record in the listing, select the **View All** link to view all projects.
8. Verify the Project ID starts with your Agency Mask. If it does, select the **Generate Award** button.

Generate Award

From Proposal 0000009949 To Award 0000009949

From Version V101 Pre-award Spending Add to Grants Portal Security?

Project Primary Project

From Project G10FEMATRNG FEMA Training Project G10FEMATRNG

Budget

	From Budget	Activity	Description
<input checked="" type="checkbox"/>	1	1	All

9. **WARNING!** If you did not create a Project ID that starts with your Agency Mask, STOP. Do not generate the award. Follow the below steps to create a new Project ID:
 - a. Return to the **Submit Proposal** page and change the Submit Status to “Not Submitted.”
 - b. Go to the **Maintain Proposal** page and 1) add an additional project to the proposal; 2) make this additional project the primary project; and 3) enter a corresponding budget and location as outlined in the preceding steps.
 - c. Return to the **Submit Proposal** page and submit the proposal.
 - d. Return to the **Generate Award** page. Make sure to uncheck the **From Project** checkbox and corresponding **Budget** checkbox for the wrong Project ID before generating the award.
 - e. Verify that the **From Project** and [To] **Project** values match and that the Project ID starts with your Agency Mask. Only projects with correct Project IDs should be checked, along with their corresponding budget.
 - f. If everything is correct, select the **Generate** button.
10. The **Generate Award** process makes the proposal records read-only. Records are not editable and provide historical information from the original grant. From this point on, any changes must be made directly to the award profile, project, and contract.
 - a. The **Generate Award** process takes some time to complete, given all the actions involved. Don’t be alarmed if it doesn’t happen right away; give it a minute or so. **WARNING!** Do not select the **Generate** button more than once.
 - b. When the process is complete, the **Generate** button is grayed out. You are now ready to work directly with your award, project, and contract.

Step 9: Review the Award Profile

It’s a good idea to review the Award and verify the entries. When the award is generated, the grant customer contract, award, project, and activity pages are created with information supplied from the proposal entries.

You can no longer make changes to the proposal and must maintain the grant using contract, award, project, and activity pages.

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

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

2. On the **Award Profile** search page, verify or enter the Business Unit.
3. Enter additional search criteria as needed to narrow your results.
4. Select the **Search** button.
5. Select the **Award ID** in the **Search Results** section. Notice that the Award ID and Proposal ID match.

- Award Profile
- Project
- Project Activity
- Project Budgets
- Commitment Control Errors

Award Profile

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent
Choose from recent searches
▼
✎ Saved
Choose from saved searches

Searches
Searches

Business Unit =

Award ID begins with

Project begins with

Description begins with

PI ID begins with

Proposal ID begins with

Reference Award Number begins with

^ Show fewer options

Case Sensitive

Search

Clear

Save Search

▼ Search Results

1 rows - Business Unit "G1001" Award ID "0000009950"

Business Unit	Award ID	Project	Description	PI ID	Proposal ID	Reference Award Number	
G1001	0000009950	000000000001050	FEMA Training	00340679	0000009950	0000009186	>

- The Award profile page displays. From the Award page, you can view the Award entries and use links to view the Contract and access other related pages.

The screenshot displays the 'Award' profile page with the following details:

- Award ID:** 0000009950
- Reference Award Number:** 0000009186
- Federal Award Identification Number:** P0756981
- Title:** FEMA Training
- Long Description:** (Empty field with 254 characters remaining)
- Award PI:** (Searchable field)
- Sponsor:** PUBLIC SAFETY DEPT
- Post Award Administrator:** (Searchable field)
- Purpose:** (Searchable field)
- Status:** Accepted
- Award Type:** Grant
- CFDA:** 97.039
- Proposal ID:** 0000009950
- Version ID:** V101
- Start Date:** 07/01/2024
- End Date:** 07/31/2026
- Hold Billing on Unpaid Cost
- Hold Revenue on Unpaid Cost

Navigation links at the bottom include: [View Contract](#), [Contract Rates](#), [Additional Information](#), [Grant Administrator](#), and [Sponsor Website](#).

Associated Project

PC Business Unit	Project	Description	Project Start Date	Project End Date	Commitment Control Begin Date	Commitment Control End Date
G1001	00000000001050	FEMA Training	07/01/2024	07/31/2026	07/01/2024	07/31/2026

Go To: [Sponsor](#) [Protocols](#) [Attributes](#) [Department Credit](#) [Notepad](#) [Award Modifications](#) [Supplemental Data](#)

Step 10: Finalize the Project Budget

You need to navigate to the Project Budgets page and finalize the budget you created in Proposal Setup. Finalizing the project budget creates the project budget by sending the data to Commitment Control module. If the process is successful, grant transactions can be processed against the project budget. If the process is unsuccessful, you must navigate to the Commitment Control Errors page to view and correct the entries.

- Navigate to the **Project Budgets** 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.

- At the **Project Budgets** search page, verify or enter the **Business Unit**.
- Enter additional search criteria as needed to narrow your results.

4. Select the **Search** button.
5. Select the **Project ID** in the Search Results section.
6. The Budget Detail page displays. In most cases the defaulted information is correct. Values vary based on your agency and Budget Items (**Activity**). Confirm entries in the **Budget Amounts for Period** section and make any necessary changes. You can select the **Show All Columns** (☰) icon or select “Zoom Budget Amounts for Period” from the **Grid Action** (☰) menu to see all fields.

Fields	Description
Analysis Type	“BUD” (Total Cost Budget) should be selected for the Sponsor Direct Amount. “CBU” (Cost Sharing Budget) should be selected for the Cost Sharing Budget.
Budget Item	The Budget Items listed vary depending on the agency.
ChartFields	Available ChartFields include Fund, Financial Department ID, Appropriation ID, Account, Subaccount, Statewide Cost (Proj), Agency Cost 1 and 2, Activity, Category and Subcategory.
Cost Sharing Checkbox	The Cost Sharing Checkbox should be checked if this row relates to a Cost Share amount.
Facilities and Administration	The Facilities & Administration checkbox should not be checked. Note: 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.
Generate Parent Budget(s) Checkbox	The Generate Parent Budget(s) checkbox should always be checked.
Ledger Group (Display Only)	This Ledger Group varies by Business Unit: “KK_PRJ_CHD” for all Business Units except B2202, H6001, and H5502. “KK_PRJ_CDE” for B2202, H6001, and H5502 Business Units only.
Ledger (Display Only)	This Ledger varies by Business Unit: “KK_PRC_BUD” for all Business Units except B2202, H6001, and H5502. “KK_PRCDBUD” for B2202, H6001, and H5502 Business Units only.
Source Type	“BUD” should be selected.

7. After verifying and updating as needed, select the **Finalize** button.

Budget Detail

Project G10FEMATRNG FEMA Training

Budget Period 1 Begin Date 07/01/2024 End Date 07/31/2026 Finalize [Process Monitor](#)

Project Budget Summary

Cost Share Direct \$26,400.00 Currency USD Total Budget \$132,000.00

Sponsor Budget \$105,600.00 Security Status None

Budget Amounts for Period

[Grid Icon] [Search Icon] 1-2 of 2 >> | View All

General | Project Detail | General Ledger Detail | Commitment Control Detail ▶

Fund Code	Financial Department ID	Appropriation ID (CF3)	Account	Activity	Amount	Analysis Type	Budget Item	Sub Account (Class)	Statewide Cost (Prog)	Agenc Cost 1 (CF1)
	G1010000			1	105,600.00	BUD	ALL			
	G1000000			1	26,400.00	CBU	ALL			

Save Return to Search Notify

8. 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

9. 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

10. At the Process List page, select the **Refresh** button until the Run Status = Success and the Distribution Status = Posted.
11. You must access the Message Log to ensure that the process was successful. Select the **Actions** drop-down list and select "Message Log."

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	45548178		PC_INTFEDIT1211469	Application Engine	PC_WRAPPER	TRN11	07/19/2024 4:50:19PM CDT	Success	Posted	Details	<ul style="list-style-type: none"> Update Process > Details Parameters Message Log Batch Timings View Log/Trace

12. 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.
- c. If errors exist, refer to the [Correct Commitment Control \(Budget Check\) Errors](#) guide for assistance.

Time	Message	Action
10 2:00:49PM	2 Row(s) Processed	Explain
2:00:49PM	WARNING: UNABLE TO PERFORM COMMIT - FORCING USE OF BASE TABLE FOR PC_KK0_TAO	Explain
2:00:49PM	WARNING: UNABLE TO PERFORM COMMIT - FORCING USE OF BASE TABLE FOR PC_KK4_TAO	Explain
10 2:00:49PM	2 rows started commitment control budget creation.	Explain
10 2:00:49PM	2 rows inserted into PC_KK_HDR.	Explain
10 2:00:49PM	2 rows inserted into PC_KK_LN.	Explain
10 2:00:50PM	Commitment Control Budget Processing has begun.	Explain
10 2:00:54PM	Request Statistics. Documents Processed: 2, Errors: 0, Warnings: 0	Explain
10 2:00:54PM	Commitment Control Budget Processing Complete.	Explain

Step 11: Activate the Customer Contract

When running the Generate Award process, SWIFT created a customer contract for the sponsor that is in “Pending” status. You need to change the Status to “Active” before you can process any transactions and bill against the contract.

Note: If your agency uses the Grant Module to bill for reimbursement but this is a proposal that you don’t want to bill, you also need to complete the Step 12 and place the contract Billing and Revenue Plans “On Hold.”

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

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

2. On the **Award Profile** search page, verify or enter the Business Unit.
3. Enter additional search criteria as needed to narrow your results.
4. Select the **Search** button.
7. Select the **Award ID** in the **Search Results** section.
8. The Award profile page displays. Select the **View Contract** link.

The screenshot displays the 'Award Profile' page. At the top, there are navigation tabs: Award, Funding, Resources, Certifications, Terms, Milestones, Key Words, and Funding Inquiry. The main form contains the following fields:

- Award ID: 0000009950
- Reference Award Number: 0000009188
- Federal Award Identification Number: P0756981
- Title: FEMA Training
- Long Description: (Empty text area with a 254 character remaining limit)
- Award PI: (Searchable field)
- Sponsor: PUBLIC SAFETY DEPT
- Post Award Administrator: (Searchable field)
- Purpose: (Searchable field)
- Status: Accepted
- Award Type: Grant
- CFDA: 97.039
- Proposal ID: 0000009950
- Version ID: V101
- Start Date: 07/01/2024
- End Date: 07/31/2026
- Options: Hold Billing on Unpaid Cost, Hold Revenue on Unpaid Cost

At the bottom left of the form, the 'View Contract' link is highlighted with a red box. Other links include Contract Rates, Additional Information, Grant Administrator, and Sponsor Website. Below the form is the 'Associated Project' section, which includes a table with the following data:

PC Business Unit	Project	Description	Project Start Date	Project End Date	Commitment Control Begin Date	Commitment Control End Date
G1001	000000000001050	FEMA Training	07/01/2024	07/31/2026	07/01/2024	07/31/2026

At the bottom of the page, there is a 'Go To:' section with links for Sponsor, Protocols, Attributes, Department Credit, Notepad, Award Modifications, and Supplemental Data.

9. Review the Customer Contract pages before activating the contract.
 - a. You can select the **Expand** icon (arrow) for the **Other Information** section to view the Proposal ID and select the **View Award Profile** link to go to the Award Profile pages.

Other Information

Template Contract
 Master Contract
 Legal Review Complete
 Credit Check Complete
 Contains Cotermination Lines

Parent Contract
 Master Contract
 Legal Entity STATEOFMN
 Purchase Order
 Proposal ID 000009950
 Federal Region Code 05

b. You can select the **Expand** icon (arrow) for the **Summary of Amounts** section to view the Bill and Revenue contract amounts. The amounts do not include any Cost Share amount.

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)	105,600.00	As Incurred Revenue Limits (Less Prepaid)	105,600.00
Recurring Billing	0.00	Recurring Revenue	0.00
Total	105,600.00	Total	105,600.00

Fixed Billing Allocation Complete Fixed Revenue Allocation Complete

c. You can select the **Billing Plans** or **Revenue Plans** links and note that the plans have a status of "Pending." Use the **Return to General Information** link to return to the General page for the Award Profile.

10. Select "Active" in the **Contract Status** Lookup list.

11. Select the **Save** button.

General | Lines | Amndments

Contract Number 000009950 Sold To Customer PUBLIC SAFETY DEPT
 Amendment Number 000000000 *Contract Status ACTIVE

Description FEMA Training Processing Status Active
 Contract Admin Amendment Status

Region Code Business Unit Minnesota Management & Budget
 Contract Type GRANTS Contract Classification Standard
 Currency Code USD Last Amended
 Exchange Rate Type CRRNT Start Date 07/01/2024
 Contract Signed 07/01/2024 End Date 07/31/2026
 Contract Role Last Update Date/Time 08/06/2024 4:51:14PM
 Revenue Profile Last Update User ID 00340679

Use Project ChartFields: Separate Fixed Billing and Revenue:
 Separate As Incurred Billing and Revenue:

[> Other Information](#)
[> Summary of Amounts](#)

[Billing Plans](#) [Revenue Plans](#) [Milestones](#) [Renewals](#) [Supplemental Data](#) Go To More

[Return to Award Profile](#)

Step 12: Optionally Place the Contract Billing/Revenue Plan “On Hold”

If your agency uses the Grant Module to bill for reimbursement, but you do not want to bill for this specific contract, you need to place the Billing and Revenue Plans “On Hold” to prevent the grant from creating recognized revenue. If this situation comes up frequently, contact the SWIFT Helpdesk to discuss options that are available.

1. From the Customer Contract pages General tab, select the **Revenue Plans** link in the **Go To** section at the bottom of the page.
2. The Assign Revenue Plan page displays. Select the **R101** link in the Plan column.

Assign Revenue Plan

Contract 000009950 FEMA Training
Sold To Customer PUBLIC SAFETY DEPT

Contract Lines to be Assigned / Unassigned

Line	Product	Description	Revenue Amount	Price Type	Plan	Plan Description	Revenue Method	Status
1	GRANTS_REIMBURSABL	Grants Reimbursable		Rate	R101	As Incurred	As Incurred	Ready

3. Select the **Hold** checkbox on the **Revenue Plan** page.
4. The date the plan was placed on hold is automatically supplied. Select the **Save** button.
5. Select the **Return to Assign Revenue Plan** link at the bottom of the page to return to the previous page.
6. From the Assign Revenue Plan page, select the **Return to General Information** link.

Revenue Plan

Contract 000009186 Business Unit G1001 Currency USD
Sold To Customer P070100001 PUBLIC SAFETY DEPT GL Business Unit MN001
Revenue Plan R101 GL Currency USD

Description As Incurred *Plan Status Ready
Recognition Method As Incurred Hold

Define Events By Add Milestone

Hold Details
Put On Hold Date 08/05/2024
Hold User TRAINER_TRN3
Hold Reason

Event Detail

Event	Event Type	*Event Status	Accounting Date	Event Note
1	Date	Pending	08/05/2024	

Return to Assign Revenue Plan

Save Return to Search Notify Add Update/Display

7. Next, select the **Billing Plans** link in the **Go To** section on the General Page for Award Profile.

8. The **Assign Billing Plan** page displays. Select the **B101** link.

Assign Billing Plan

Contract 0000009950 FEMA Training
Sold To Customer PUBLIC SAFETY DEPT

Contract Lines to be Assigned / Unassigned

Line	Product	Line Description	Billing Amount	Price Type	Plan	Plan Description	Billing Method	Status
<input type="checkbox"/>	1	GRANTS_REIMBURSABL		Rate	B101	As Incurred	As Incurred	Ready

9. Select the **Hold** checkbox. The date the plan was placed on hold is automatically supplied.

Billing Plan General Events Tax Parameters History

Contract 0000009950 BI Unit G1001
Sold To Customer P070100001 PUBLIC SAFETY DEPT Bill To P070100001 PUBLIC SAFETY DEPT
Billing Plan B101 As Incurred Currency USD

Description As Incurred *Billing Status Ready Actions

Billing Method As Incurred

Hold 08/06/2024

10. Select the **Save** button.

11. Select the **Return to Assign Billing Plan** link.

12. Select the **Return to General Information** link to return to the contract General Information pages.