

QUICK REFERENCE GUIDE

November 1, 2019

Add or Reduce Grant Time

When you add or reduce time to a grant, you'll need to update End Dates in the Grant Module for the Award, Budget Period, Project, Project Control, and Project Activity. You'll also need to enter a Contract Amendment and update the contract End Date. Detailed instructions are provided in this guide.

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.

Steps to complete:

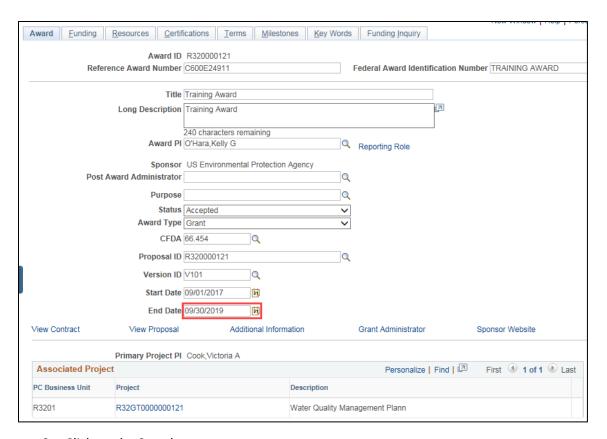
- Step 1: Update the Award End Date
- Step 2: Update the Budget Period End Date
- Step 3: Update the Project End Date
- Step 4: Update the Project Control End Date
- Step 5: Update the Project Activity End Dates
- Step 6: Enter Contract Amendment
- Step 7: Update the Contract End Date
- Step 8: Process the Amendment
- Step 9: Enter a Contract Note

Step 1: Update the Award End Date

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.

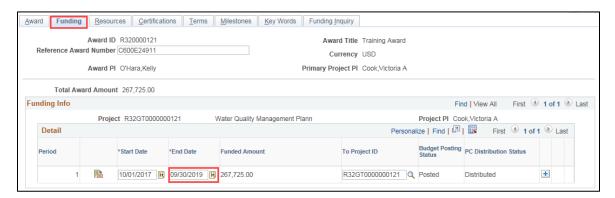
- 2. At the *Award Profile* page, verify the *Business Unit* and enter the *Award ID* for the award you want to update. (You can also search by Project ID, Description, and Proposal ID.)
- 3. Click on the **Search** button.
- 4. Select the Award in the **Search Results**, if necessary. The *Award Profile* page displays.
- 5. On the **Award** tab, update the *End Date*.



6. Click on the Save button.

Step 2: Update the Budget Period End Date

- 1. Click on the **Funding** tab of the *Award Profile* pages.
- 2. Update the Budget Period End Date in the Detail Section.



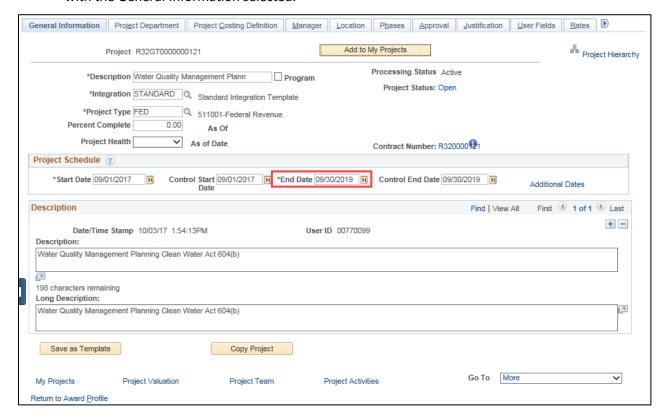
3. Click on the Save button.



Step 3: Update the Project End Date

WARNING! If you are reducing the time, you will need to update the Project Activity End Dates before updating the Project End Date. Refer to Step 5: Update the Project Activity End Dates.

- 1. Click on the **Award** tab of the *Award Profile* pages.
- 2. In the **Associated Project** section, click on a *Project ID* in the listing. The *Project* pages display with the General Information selected.



- 3. Update the Project End Date in the Project Schedule section.
- 4. Click on the Save button.

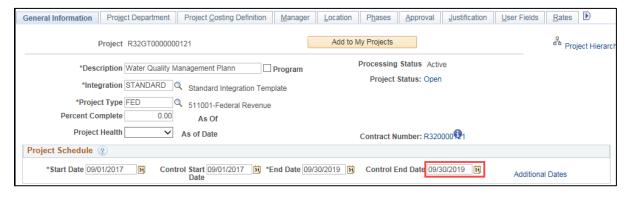
Step 4: Update the Project Control End Date (Optional)

You can also update the *Control End Date* on the **General Information** tab of the Project if you have been assigned the user role "M_FS_PC_KK_DATES".

The *Control Start* and *End* dates directly relate to the Commitment Control Project Budget. Since the State of Minnesota only budgets projects on expenses, you should only extend the *Project Control End Date* later than the *Project End* date *if* there are expenses that still need to process within the terms of the grant agreement. Otherwise, control dates should conform to the project dates.



1. On the **General Information** tab of the *Project* pages, update the *Control End Date*.

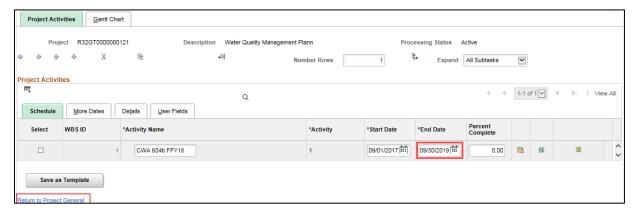


2. Click on the Save button.

Step 5: Update the Project Activity End Dates

If your project has only one activity, as in this example, the activity dates must match the project dates. If your project has multiple activities, at least one of the activities must start on the Project Start Date, and at least one of the activities must end on the Project End Date and there must be no gaps between activities. All activities must fall within the project range. Refer to the "Understand Grant Dates and Transaction Controls" guide in this guide for more information.

- 1. From the **General Information** tab of the *Project* pages, click on the *Project Activities* link in the **Go To** section.
- 2. On the *Project Activities* page, update the Activity End Date(s).



- 3. Click on the Save button.
- 4. Click on the Return to Project General link to return to the Project pages.
- 5. On the **General Information** tab for the Project, click on the *Return to Award Profile* link in the **Go To** section.
- 6. If you have additional projects for the Grant, repeat Steps 3 through 5 for each Project.



Step 6: Enter Contract Amendment

Since the contract is in "Active" status, you will need to enter a contract amendment, update the contract *End Date* and then process the amendment.

Note: You must complete these steps in this order. If you process the amendment before changing the contract date, you may get an error message.

1. From the *Award Profile* page, click on the *View Contract* link located above the **Associated Project** section on the left side of the page.

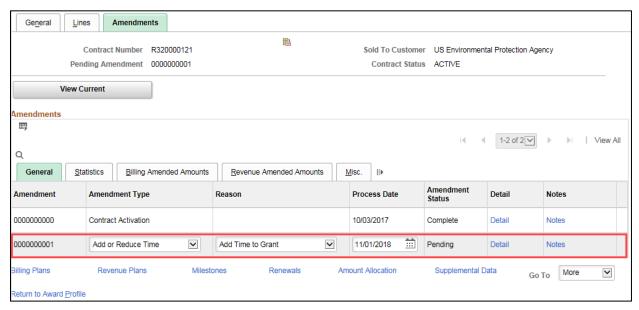
The contract *General* page displays. Note the current *Contract* Status and *Amendment Number*.



- Click on the Amendments tab.
- 3. Click on the **Amend Contract** button. A new row opens.

Field Name	Field Description
*Amendment Type	Select the "Add or Reduce Time" Amendment Type from the drop-down menu.
*Reason	Select the appropriate Reason from the drop-down listing: - Add Time to Grant
	- Reduce Time

4. Click on the Save button. A new amendment has been created in the "Pending" status.

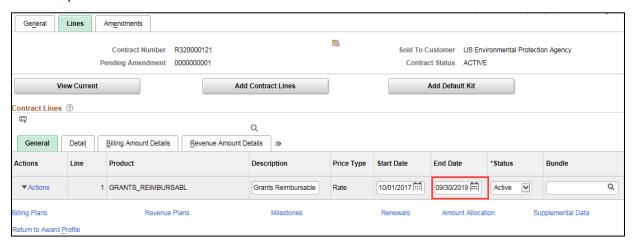




Step 7: Update the Contract End Date

Next, update the Contract End Date.

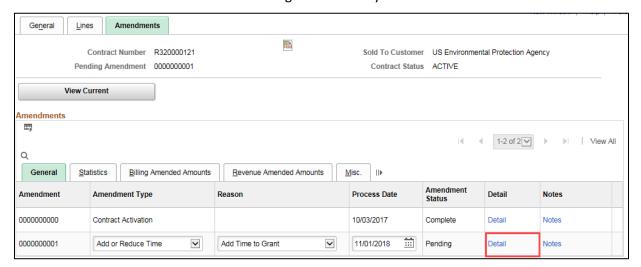
- 1. Click on the **Lines** tab. Verify that you are working on the pending amendment number you just created
- 2. Update the contract End Date.



3. Click on the Save button.

Step 8: Complete Processing of the Amendment

- 1. Click on the Amendments tab to finish processing the amendment.
- 2. Click on the Detail link for the Pending Amendment you created.

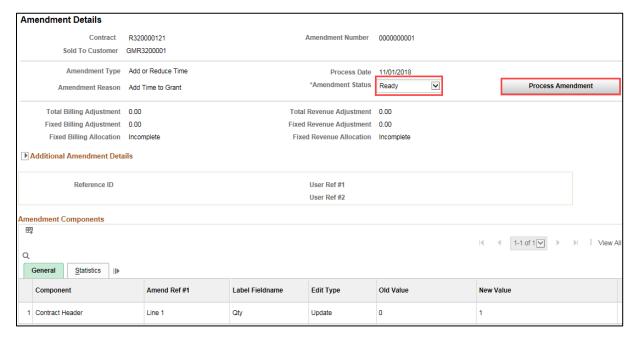


- 3. On the *Amendment Details* page, verify that the *Amendment Type* and *Reason* are correct. You can change them on this page, if necessary.
- 4. Change the Amend Status to "Ready".



Note: When you change the *Amend 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 *Amend Status* back to "Pending". After you click on the **Process Amendment** button in the next step, you won't be able to make changes to this amendment. You would need to create a new amendment to make further changes or undo what you have done.



5. When you are ready, click on the **Process Amendment** button. The *Amend Status* is updated to "Complete".



6. Click on the *Return to General Information* link at the bottom of the page to return to the **Amendments** tab of the Contract.

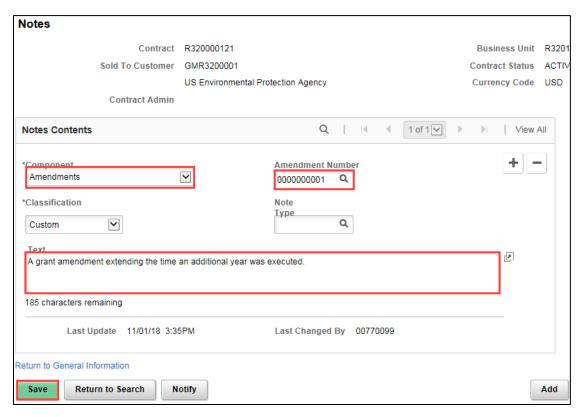
Step 9: Add a Contract Note

You can add a contract note to describe the changes you've made.

- 1. Click on the Notes link for the amendment.
- 2. Complete the *Notes* page as follows:



Field Name	Field Description
*Component	Select "Amendments".
*Amendment Number	Click on the Lookup and select the Amendment Number you created.
*Classification	Select "Custom".
Note Type	Minnesota does not use.
*Text	Enter a note describing the change you made. The field length is 254 characters.



- 3. Click on the Save button.
- 4. Click on the Return to General Information link at the bottom of the page.

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• The contracts **General** tab will display the updated End Date.

