

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*.

[Award](#) | [Funding](#) | [Resources](#) | [Certifications](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [Funding Inquiry](#)

Award ID R320000121
 Reference Award Number C600E24911 Federal Award Identification Number TRAINING AWARD

Title Training Award
 Long Description Training Award 240 characters remaining

Award PI O'Hara,Kelly G Reporting Role

Sponsor US Environmental Protection Agency
 Post Award Administrator

Purpose
 Status Accepted
 Award Type Grant
 CFDA 66.454
 Proposal ID R320000121
 Version ID V101
 Start Date 09/01/2017
 End Date 09/30/2019

[View Contract](#) | [View Proposal](#) | [Additional Information](#) | [Grant Administrator](#) | [Sponsor Website](#)

Primary Project PI Cook,Victoria A

Associated Project Personalize | Find | 1 of 1 | Last

PC Business Unit	Project	Description
R3201	R32GT0000000121	Water Quality Management Plann

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.

[Award](#) | **[Funding](#)** | [Resources](#) | [Certifications](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [Funding Inquiry](#)

Award ID R320000121 Award Title Training Award
 Reference Award Number C600E24911 Currency USD
 Award PI O'Hara,Kelly Primary Project PI Cook,Victoria A

Total Award Amount 267,725.00

Funding Info Find | View All | First | 1 of 1 | Last

Project R32GT0000000121 Water Quality Management Plann Project PI Cook,Victoria A

Detail Personalize | Find | 1 of 1 | Last

Period	*Start Date	*End Date	Funded Amount	To Project ID	Budget Posting Status	PC Distribution Status
1	10/01/2017	09/30/2019	267,725.00	R32GT0000000121	Posted	Distributed

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.

The screenshot displays the 'Project R32GT000000121' page. The 'Project Schedule' section is active, showing the following details:

- *Start Date: 09/01/2017
- Control Start Date: 09/01/2017
- *End Date: 09/30/2019 (highlighted with a red box)
- Control End Date: 09/30/2019

The 'Description' section shows the project name: 'Water Quality Management Planning Clean Water Act 604(b)'. The 'Project Schedule' section also includes a 'Save as Template' button and a 'Copy Project' button. At the bottom, there are navigation links for 'My Projects', 'Project Valuation', 'Project Team', and 'Project Activities', along with a 'Go To' dropdown menu set to 'More'.

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*.

The screenshot shows the 'General Information' tab for a project with ID R32GT0000000121. The project description is 'Water Quality Management Plann'. The 'Control End Date' field is highlighted with a red box and contains the date '09/30/2019'. Other fields include 'Start Date' (09/01/2017), 'Control Start Date' (09/01/2017), and 'End Date' (09/30/2019). The 'Project Status' is 'Open' and 'Processing Status' is 'Active'.

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).

The screenshot shows the 'Project Activities' page for the same project. A table lists activities with columns for 'Select', 'WBS ID', 'Activity Name', 'Activity', 'Start Date', 'End Date', and 'Percent Complete'. The first activity row has WBS ID '1', Activity Name 'CWA 604b FFY16', and End Date '09/30/2019', which is highlighted with a red box. A 'Return to Project General' link is visible at the bottom left.

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*.

Contract Number R320000121
 Sold To Customer US Environmental Protection Agency
 Amendment Number 000000000
 *Contract Status ACTIVE

2. 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.

Contract Number R320000121
 Pending Amendment 0000000001
 Sold To Customer US Environmental Protection Agency
 Contract Status ACTIVE

View Current

Amendments

1-2 of 2 | View All

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000	Contract Activation		10/03/2017	Complete	Detail	Notes
0000000001	Add or Reduce Time	Add Time to Grant	11/01/2018	Pending	Detail	Notes

Return to Award Profile

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*.

The screenshot shows the 'Lines' tab for contract R320000121. The 'End Date' for line 1 is set to 09/30/2019 and is highlighted with a red box. The contract status is 'ACTIVE'.

Actions	Line	Product	Description	Price Type	Start Date	End Date	*Status	Bundle
▼ Actions	1	GRANTS_REIMBURSABL	Grants Reimbursable	Rate	10/01/2017	09/30/2019	Active	

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.

The screenshot shows the 'Amendments' tab for contract R320000121. The 'Detail' link for the pending amendment (0000000001) is highlighted with a red box. The amendment type is 'Add or Reduce Time' and the reason is 'Add Time to Grant'.

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000000	Contract Activation		10/03/2017	Complete	Detail	Notes
0000000001	Add or Reduce Time	Add Time to Grant	11/01/2018	Pending	Detail	Notes

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.

Amendment Details																		
Contract	R320000121	Amendment Number	000000001															
Sold To Customer	GMR3200001																	
Amendment Type	Add or Reduce Time	Process Date	11/01/2018															
Amendment Reason	Add Time to Grant	*Amendment Status	Ready	<input type="button" value="Process Amendment"/>														
Total Billing Adjustment	0.00	Total Revenue Adjustment	0.00															
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																		
<div style="text-align: right;"> 1-1 of 1 View All </div>																		
<table border="1"> <thead> <tr> <th>Component</th> <th>Amend Ref #1</th> <th>Label Fieldname</th> <th>Edit Type</th> <th>Old Value</th> <th>New Value</th> </tr> </thead> <tbody> <tr> <td>1 Contract Header</td> <td>Line 1</td> <td>Qty</td> <td>Update</td> <td>0</td> <td>1</td> </tr> </tbody> </table>							Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value	1 Contract Header	Line 1	Qty	Update	0	1
Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value													
1 Contract Header	Line 1	Qty	Update	0	1													

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

Amendment Details						
Contract	R320000121	Amendment Number	000000001			
Sold To Customer	GMR3200001	Amendment Completed On	11/01/2018 3:28PM			
Amendment Type	Add or Reduce Time	Process Date	11/01/2018			
Amendment Reason	Add Time to Grant	Amendment Status	Complete			

- 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.

- Click on the *Notes* link for the amendment.
- 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.

Notes

Contract R320000121 Business Unit R3201
 Sold To Customer GMR3200001 Contract Status ACTM
 US Environmental Protection Agency Currency Code USD
 Contract Admin

Notes Contents 1 of 1 View All

*Component: Amendments
 Amendment Number: 000000001
 *Classification: Custom
 Note Type:
 Text: A grant amendment extending the time an additional year was executed.
 185 characters remaining

Last Update 11/01/18 3:35PM Last Changed By 00770099

[Return to General Information](#)

Save Return to Search Notify Add

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

SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

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

General	Lines	Amendments
Contract Number R320000121		Sold To Customer US Environmental Protection Agency
Amendment Number 000000001		*Contract Status ACTIVE
<input type="button" value="Amend Contract"/>		<input type="button" value="Add to My Contracts"/>
Description Water Quality Management Plan		Processing Status Active
Contract Admin <input type="text"/>		Amendment Status Complete
Region Code		Business Unit Pollution Control Agency
Contract Type GRANTS		Contract Classification Standard
Currency Code USD		Last Amended 11/01/2018
Exchange Rate Type CRRNT		Start Date 10/01/2017
Contract Signed 10/01/2017		End Date 09/30/2019
Contract Role		Last Update Date/Time 11/01/2018 3:24:46PM
Revenue Profile		Last Update User ID 00770099
Use Project ChartFields: <input type="checkbox"/>		Separate Fixed Billing and Revenue: <input type="checkbox"/>
		Separate As Incurred Billing and Revenue: <input type="checkbox"/>