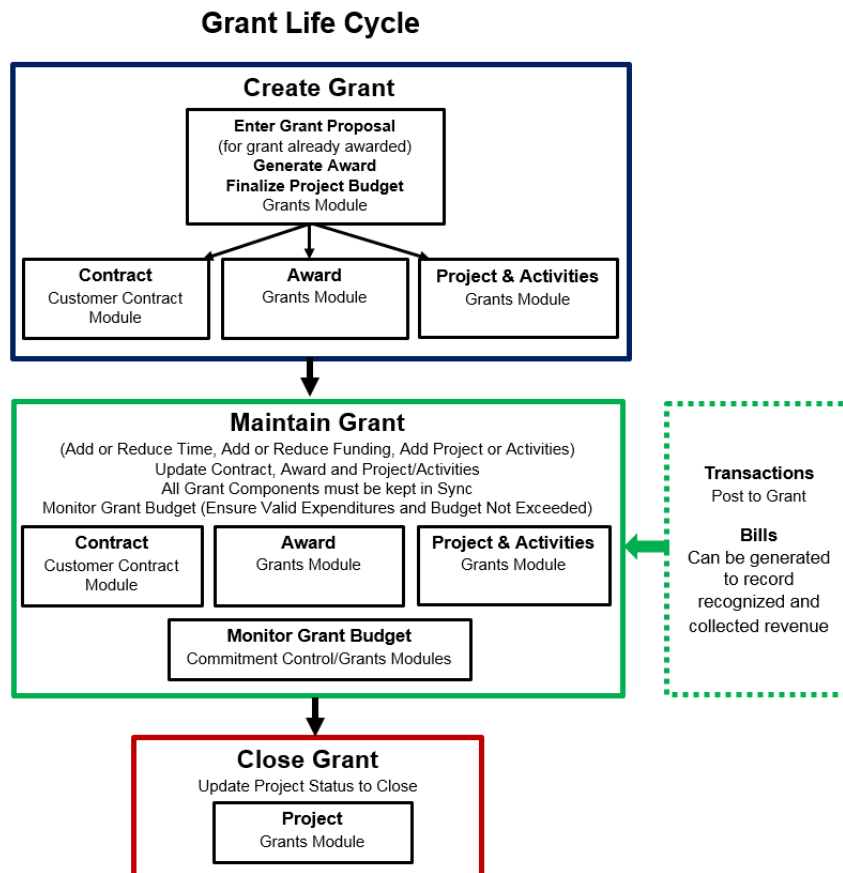


Grants (Incoming) Overview

The Grants Management module is used to document awards that have **already been granted** by an outside organization, including federal government agencies, other state agencies, and non-profit groups. In the State of Minnesota, agencies that receive federal financial assistance must track all financial activity in SWIFT. For additional information, review the policies and procedures contained in Statewide Financial Policies, [Chapter 4 – Grants and Projects](#), including:

- [Statewide Operating Policy No. 0402-03](#), Single Audit: Responsibilities Concerning Subrecipients of Federal Financial Assistance
- [Statewide Operating Procedure No. 0402-02.1](#), Single Audit: Accounting for and Reporting of Federal Financial Assistance

The Grant Life Cycle chart shown below illustrates how incoming grants are created, maintained, and closed in SWIFT. A brief discussion of these processes is provided in this overview.



Create Grant

You will begin creating a grant (that is already awarded) by entering a proposal in the Grants Management Module, including the title, award sponsor (Grantor), timeline, CFDA (Catalog of Federal Domestic Assistance) number, budget, any cost share, and other information that will be used later for transactions. You will need to identify at least one project and budget activity for the grant that will be used to 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 all the data is entered and verified, the proposal is submitted, an award is generated, and the project budget is finalized.

Maintain Grant

When the award is generated, the grant customer contract, award, project and activity pages are created with information supplied from the proposal entries. The grant proposal can no longer be updated. You will maintain the grant using these pages. Instructions for processing grant amendments are provided, including adding or reducing time, increasing or decreasing funding, and adding projects or activities. It is important to keep these pages in sync, especially the dates. You'll also need to monitor the grant to ensure that valid expenditures are posted to the grant and that the grant budget is not exceeded.

Optionally Bill for Reimbursements

Agencies can optionally create bills for reimbursement of their grant expenditures. The Grants Management module works with the Customer Contracts, Billing, Commitment Control, and Accounts Receivable modules to enable agencies to create bills for reimbursement. Agencies define what is billable and reimbursable and the SWIFT Module Support Unit enters the required system configuration. To create the bills, agencies will need to run processes in the Customer Contract and Billing modules and approve the transactions on the billing worksheet. The ARUpdate process updates the customer (sponsor) accounts with the billing information in the Accounts Receivable module. Deposits can then be posted to the customer accounts, recording the collected amount.

Close the Grant

When it is time to close the grant, you'll need to verify that all transactions have been posted to the grant and then change the Project status to "Closed".

Points to Remember

There are a few important points to remember when working with incoming grants:

- The way agencies track incoming grants in SWIFT differs. Check with your agency to find out what level of detail your agency uses. The [Project Budget Definitions](#) guide may also be of assistance.
- Project IDs must begin with the first three digits of your Business Unit (your "Agency Mask"). For example, if your Business Unit is G1001, your agency mask is "G10".

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- All grant-related pages must be kept in sync. The Grants Management Quick Reference Guides will help you enter amendments to your grants so that the Award, Project, Activity and Customer Contract pages are in sync.
- Transactions must be coded with valid Project ChartFields. Transactions must have a valid ChartField combination of Project Costing Business Unit (PC Business Unit), Project ID, Activity, and Source Type.