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GrantSolutions

Grantee-Initiated Amendments

Grantee Guide

April 2012

The Grants Center of Excellence

www.grantsolutions.gov

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Amendments

The GrantSolutions amendment module makes the process of creating and submitting amendments easy. The streamlined process is simple for both Grantee's and Grantor's.

For each type of amendment chosen (i.e., *budget revision, expansion, change PI/PD*), there is a default application kit associated with it which contains online forms/enclosures and basic information pertaining to that type of amendment.

The amendment process is configured based on several factors, including who can initiate the amendment, as well as, who needs to participate in the submission and verification of an amendment. So, processing an amendment will vary slightly depending on who initiates the amendment.

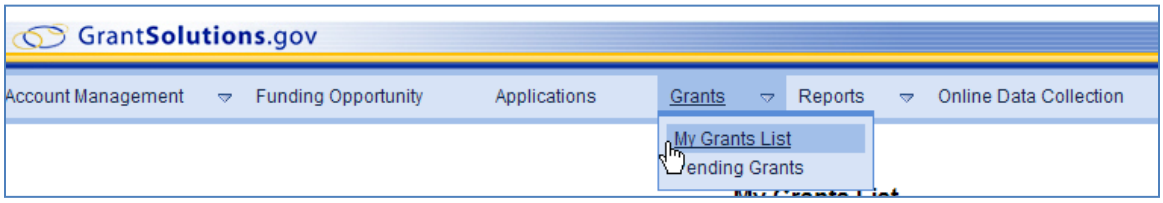
Type	Description
Grantee Initiated	Grantees login to GrantSolutions, select an option to view/manage amendments, and fill out all online forms.
Federal Initiated	Fed Staff manage the entry of data and fill out any online forms.

This job-aid will cover Grantee initiated amendments.

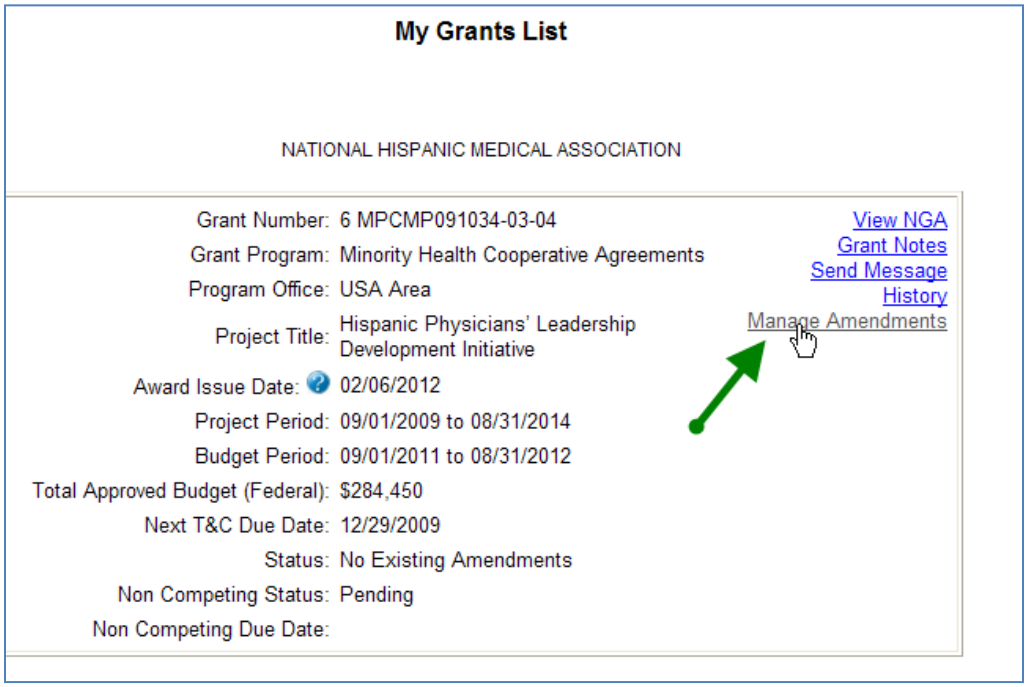
Creating a New Amendment

Menu Navigation

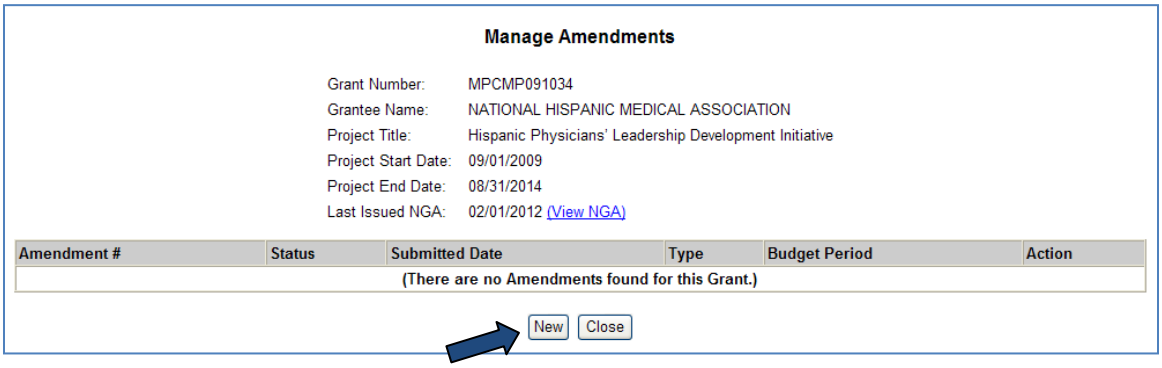
1. Log into GrantSolutions and locate the grant record on the **MY GRANTS LIST** screen.



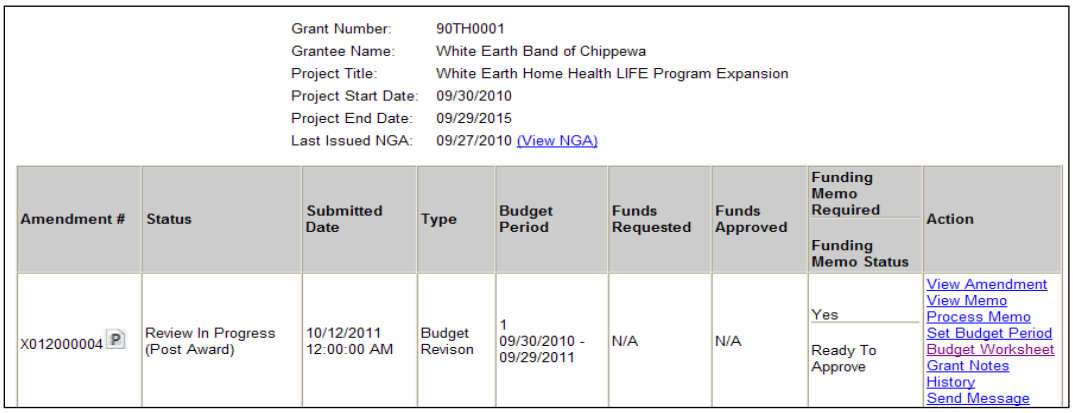
2. Click the **Manage Amendments** link. The Manage Amendments screen will appear.



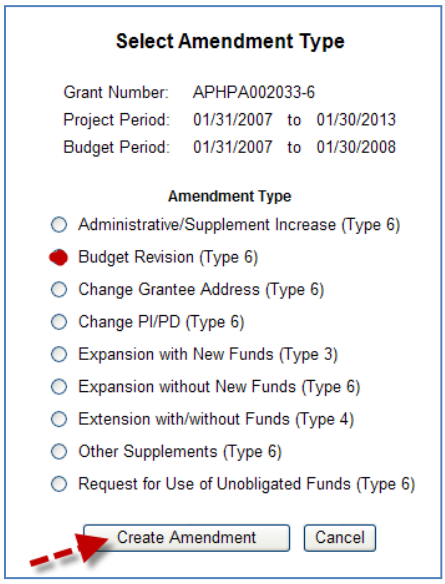
3. Select **"NEW"** to begin the amendment process.



Note: *If amendments were previously submitted, a record of each amendment would be visible on this screen, as seen in the below sample image.*

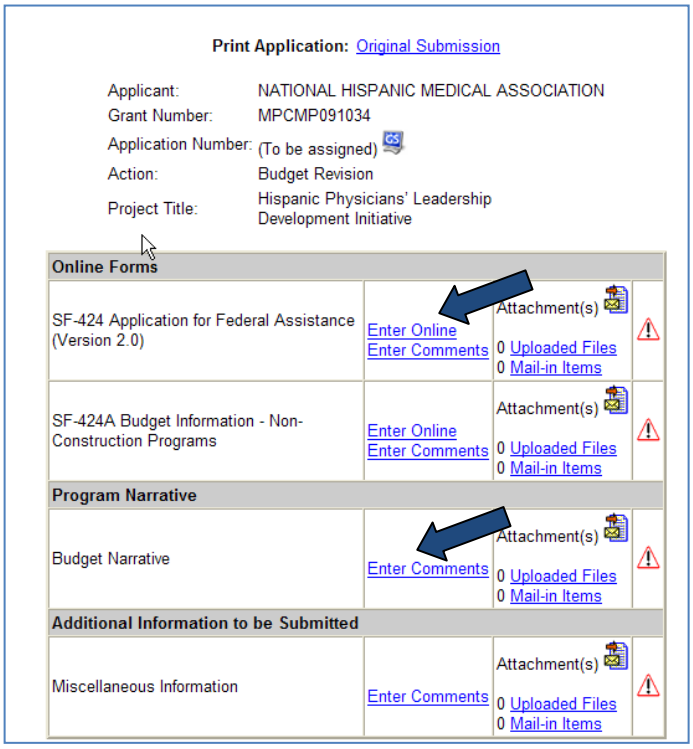


4. The **Select Amendment Type** screen will appear.
   - Click on the radio button for the amendment type you are creating
   - Click the **"Create Amendment"** button at the bottom of the screen

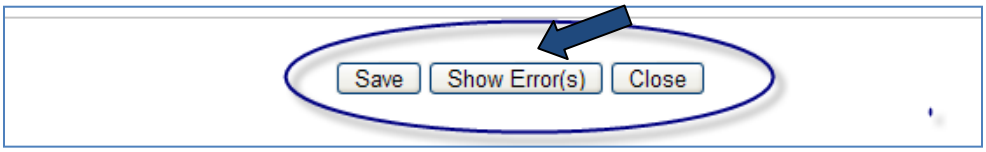


5. The **Amendment Application Control Checklist** will appear. The amendment kit contains any required forms for completing the amendment (*refer to page 4*).

6. To begin entering or uploading the requested data into each section, select the **"Upload", Enter Online"** or the **"Enter Comments"** links (i.e., online forms, program narrative, etc.)



Helpful Hint:



a. After completing the SF-424A, scroll to the bottom for options to **"Save, Show Errors, or Close"**
b. Select **"SHOW ERROR"** to view possible errors on the form that need correction.
c. Select **"SAVE"** and the page will update & return, then select **"Close".**
d. Instructions for completing on-line forms are available by clicking the link at the top of each form.

7. Each time after saving a form or uploading a file, the system will return to **Amendment Application Control Checklist.**
8. **Continue entering data in each section** until green check marks appear for each section.

A green check marks indicate a form/section was completed successfully.

A red **"X"** means the data/form was not entered or uploaded successfully in this section. Indicates a section requires additional attention.

A red triangle **!** is a warning that data has not been entered or uploaded. Indicates the section is incomplete and requires attention.

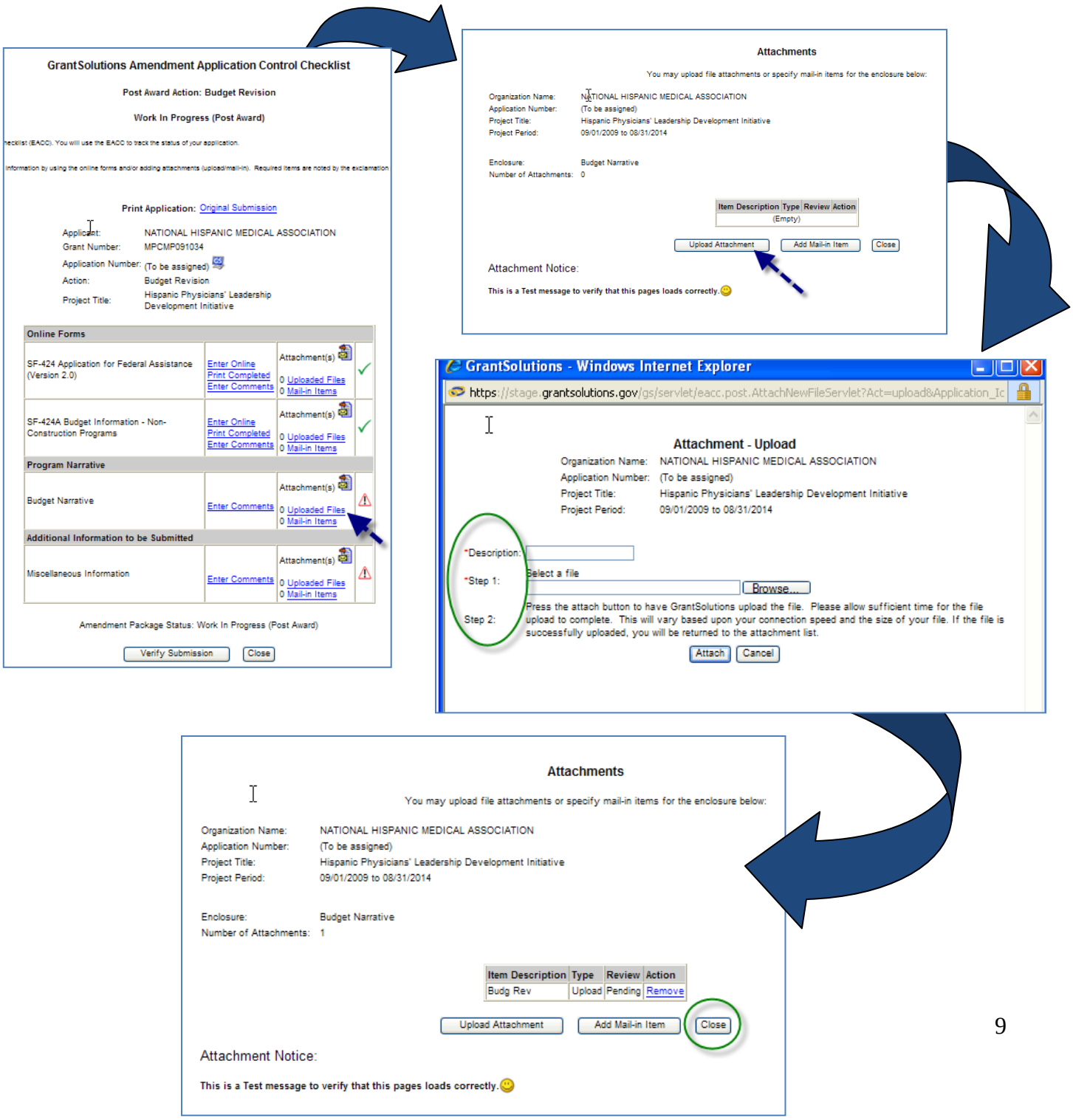
Online Forms			
SF-424 Application for Federal Assistance (Version 2.0)	Enter Online Print Completed Enter Comments	Attachment(s) 0 Uploaded Files 0 Mail-in Items	✓
SF-424A Budget Information - Non-Construction Programs	Enter Online Print Completed Enter Comments	Attachment(s) 0 Uploaded Files 0 Mail-in Items	✓
Program Narrative			
Budget Narrative	Enter Comments	Attachment(s) 0 Uploaded Files 0 Mail-in Items	⚠
Additional Information to be Submitted			
Miscellaneous Information	Enter Comments	Attachment(s) 0 Uploaded Files 0 Mail-in Items	⚠

Helpful Hint:

a. Have a specific question about a required form with your amendment application? Consult with your Grant Official, as in some instances, completing a form/section may not be required.
b. For assistance with *"how to"* upload a document to your application or other system technical issues, please contact the COE Support Center.

How to Upload Attachments into an Amendment Application

A. On the **Amendment Application Control Checklist,** click the **"Upload Files"** link.
B. The Attachments screen will appear.
C. Select "**Upload Attachment"** – A new window will open.
D. Enter a description of the document, then click **"BROWSE"** to search and select a file to upload.
E. Click the **"Attach"** link. System will return to Attachments screen.
F. Repeat steps to upload more attachments. Or, select **"CLOSE"** and return to the **Amendment Application Control Checklist**



Verifying & Completing the Amendment Application Submission

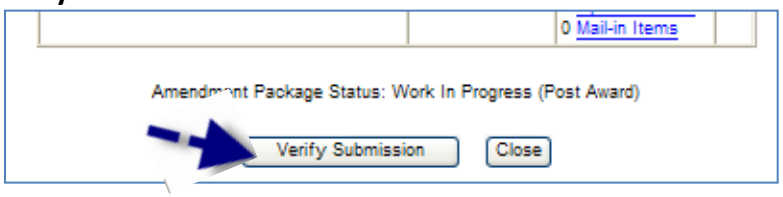
There are 2-steps remaining before the amendment application submission process is completed in GrantSolutions. First, a verification step and then a final submission step.

Note: Authority to complete the submission process will depend on a Users' role in GrantSolutions.

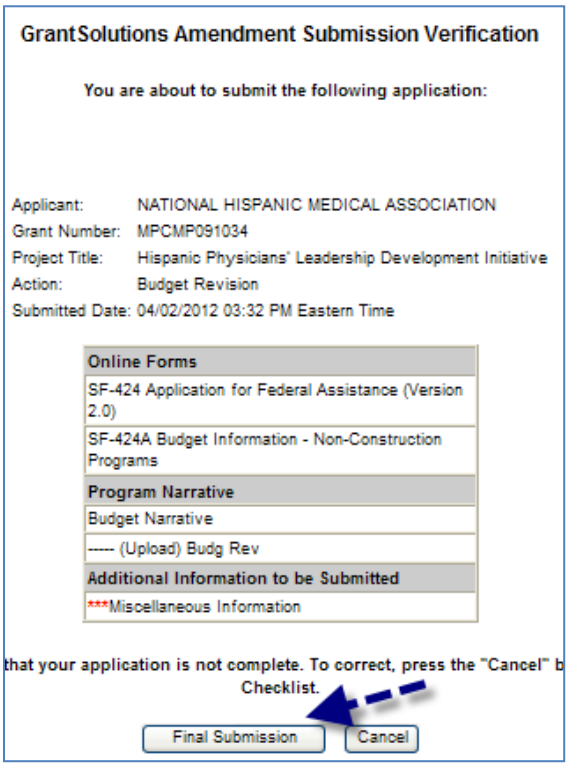
When all sections are complete, return to the **Amendment Application Control Checklist** screen to begin the submission steps for your amendment application.

A. Scroll to bottom of the **Amendment Application Control Checklist page:**

- Select the **"Verify Submission"** button.

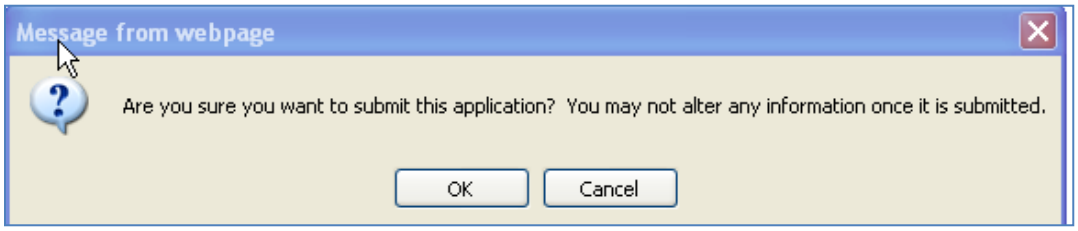


- The **"Amendment Submission Verification"** page will appear.
- Select the **"Final Submission"** button.

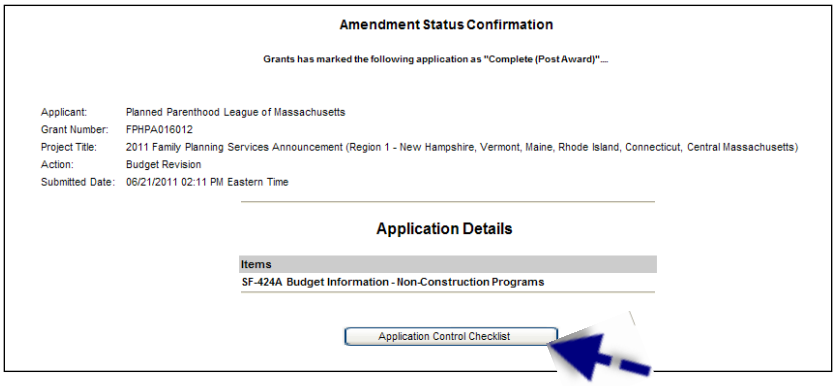


B. The below common message window appears. To withdraw or make further edits, select **"Cancel"**.
C. To proceed with submission process, select **"OK"**

NOTE: The application cannot be withdrawn and further edits/changes cannot be made after selecting "OK".



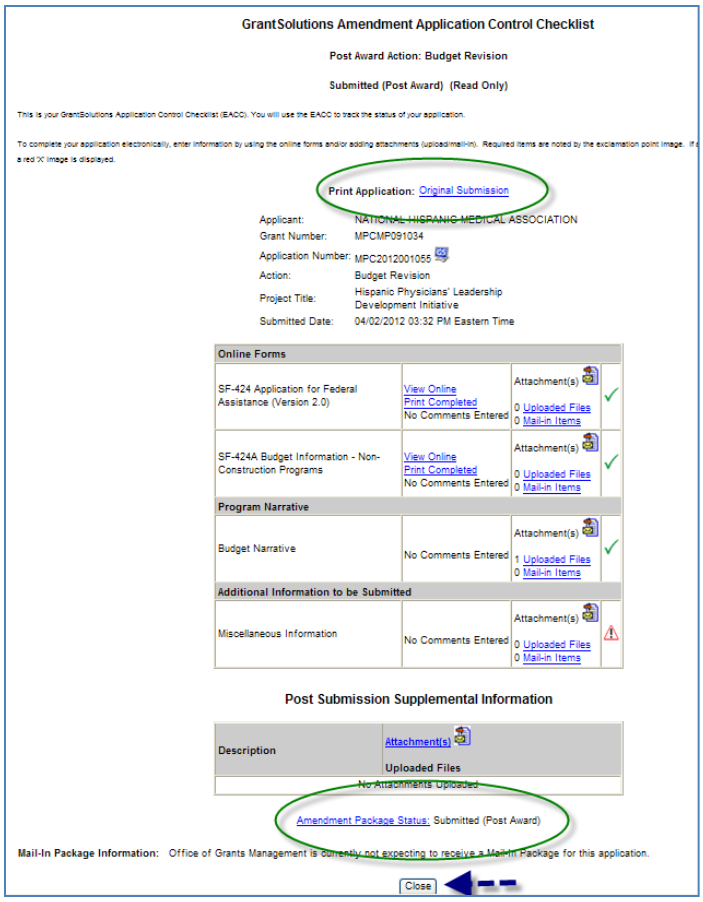
The system will return to the **Amendment Status Confirmation** page.



D. Click the **"Application Control Checklist"** button.

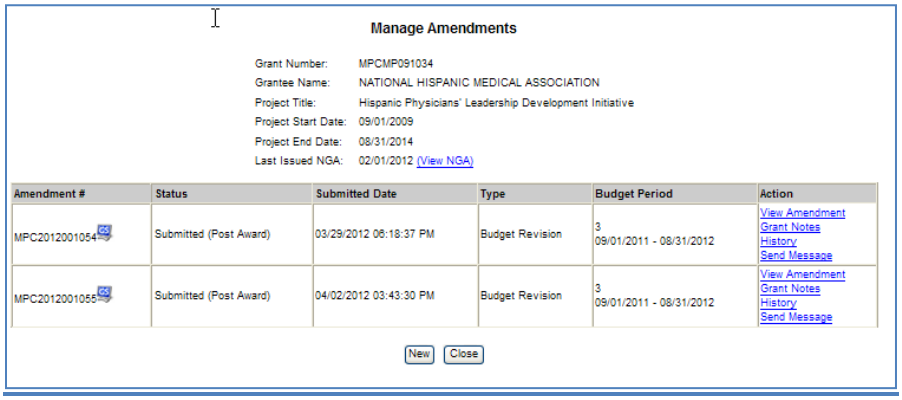
E. The **Amendment Application Control Checklist** screen will appear again.

Helpful Hint: You can review or print the amendment application and see the status of the amendment submission from the Control Checklist or Manage Amendment screen, refer to Page 5.



F. Select **"Close"** to complete the amendment application process.

G. From the **My Grants List** screen, select **Manage Amendments** link to view the status/history of amendment applications.



NOTES:

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