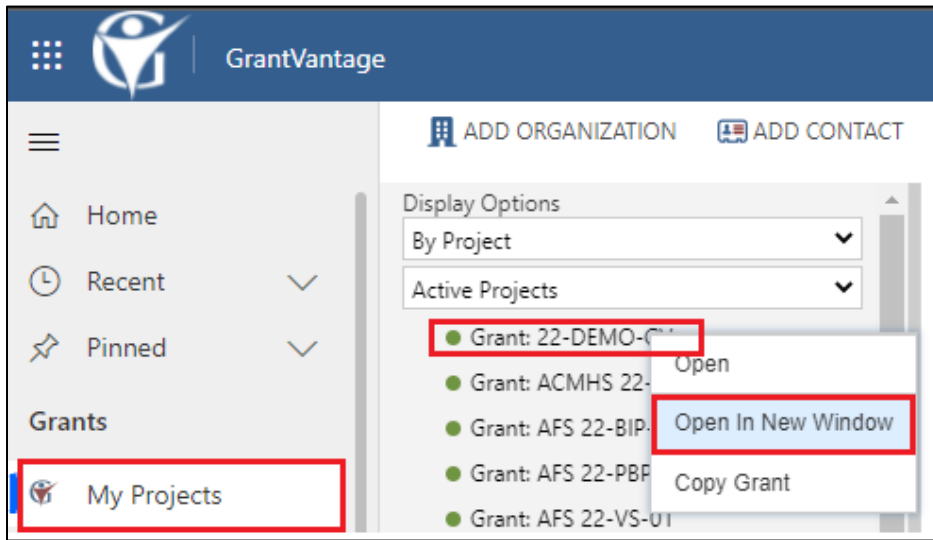


# How to Request a Budget Change in GrantVantage

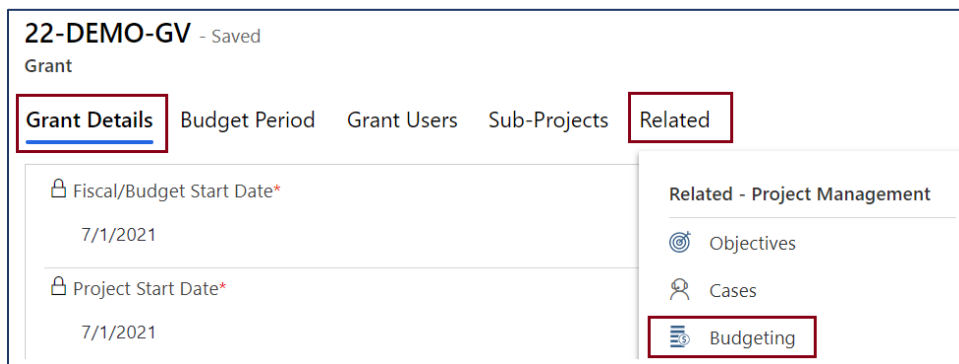
There are two types of changes you might wish to make to your CDVSA budget during the course of the fiscal year: **1) Requesting a Budget Change** is moving funds from one established category of funding to another if you over or underestimated at the start of the year how much money was needed in each of those categories, for example moving funds from personnel because you had a vacant position for some months to facilities because utility costs were higher than expected and **2) Creating a Budget Revision** happens when the original budget does not include a category of spending but now you wish to have funds in that category. For example you may not have had funds allocated to Equipment but, unexpectedly during the year, find it necessary to replace an expensive item of machinery. It also happens if you need to reduce or increase the total amount of your award.

This document provides instructions for **Requesting a Budget Change**.

In the menu at the left of your home screen, click on **My Projects** to see a list of your grant awards (NOTE: Project = Grant Award). Right-click on a project you want to open and select **Open in New Window**.



In the new window, the Project/Grant Award detail page, single click on the **Related** tab and select **Budgeting** from the drop-down menu.



From the Budgeting page, click on the **gear icon (View Options)** and select **Request Budget Change** from the dropdown menu.

**Budgeting** Related

get Version  
 Approved Revision (3/25/2022) [Icons: Refresh, Save, Excel, Upload]

Threshold	Direct	Cash Match	In-Kind Match
	107,000.00		
	20,000.00		
	7,000.00		
	36,000.00		
	2,000.00		
	26,000.00		

- Create Revision Draft
- Request Budget Change**
- View Change Requests
- Properties
- Save As Template
- New Message
- View Communication

The **Change Request** window will open. Now do the following:

- Enter a **Title** for the change as *Grant Award No. Change Request #X* (see below)
- **From Budget Category** - select the category to be reduced
- **To Budget Category** - select the category to be increased
- Use the **+ icon** if there are multiple budget categories to be reduced or increased
- Enter the **New Amount** for each budget category. The **Change Amount** is the total amount being re-allocated and the **Balance Amount** should be zero.
- Provide a brief explanation in the **Change Justification** text field.
- Click **Request Change**.

**Change Request** [Close]

Change Request | Attachment(s)

**Budget Change Status (Direct)**

Allowed Changes	Changes To Date	Remaining Allowed
10.0%	8.9%	1.1%
10,700.00	9,500.00	1,200.00

**New Change Request**

Category Type: Direct

**Title \***  
22-DEMO-GV Change Request #1

From Budget Category: 100 - Personal Services [Dropdown] Current Amount: 20,000.00 New Amount: 19,500.00

**+** To Budget Category: 400 - Supplies [Dropdown] Current Amount: 2,000.00 New Amount: 2,250.00

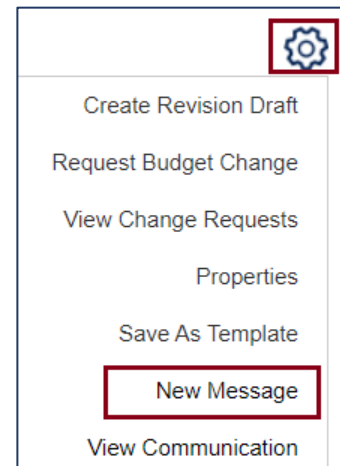
**+** 600 - Other [Dropdown] Current Amount: 5,000.00 New Amount: 5,250.00

Change Amount: 500.00 Balance Amount: 0.00

**Change Justification \***  
Type in budget change justification necessary for successful project completion

Cancel Change | Request Change

After you click the **Request Change** button, you are back in the **Budgeting** detail page. Click on the **gear icon (View Options)** and select **New Message** from the dropdown menu.



The **Messaging/Communication** window opens separately. This step will serve as the **signature, date, and time stamp** for your request.

Fill in the required (\*) fields as indicated in red. Make sure to select the CDVSA Grants Administrator in the TO field, use the same naming convention for your change request in the SUBJECT field, and click **For Approval/Review** as the message type. Use the message box to describe the reason for requesting this change. Click **SEND**.

A screenshot of a web browser window titled 'addNewMessage.html - Work - Microsoft Edge'. The URL is 'https://adpsgrants.crm9.dynamics.com/main.aspx?appid=6e08a802-e922-ea11...'. The form contains the following fields: 'From \*' with a redacted name and 'Subgrantee' label; 'To \*' with 'Grants Administrator' label; 'Related To (Select One) \*' with a dropdown menu showing 'Change Request'; 'Subject \*' with '22-DEMO-GV Change Request #1'; 'Message Type (Check One) \*' with radio buttons for 'Inquiry/Response', 'For Approval/Review' (selected), 'Accept', 'Decline', and 'FYI'; a 'Message \*' text area with the placeholder 'Type in your BAR justification'; and 'Project' with '22-DEMO-GV'. A 'SEND' button is at the bottom right. Red boxes highlight the 'From', 'To', 'Related To', 'Subject', 'For Approval/Review', and 'SEND' elements.

After you send the communication in GrantVantage, also notify the Grants Administrator via email from your work account (Outlook, Gmail, etc.). Please cc: your Program Coordinator.

- Email Subject: Agency Acronym - Award # - Change Request #X submitted in GV
- Body of Email: Justification for requested budget change.

Requests for budget changes are reviewed and approved by the Grants Administrator and your Program Coordinator. You will be notified via email once all approvals are in place.

## How to View Pending, Approved, Declined Budget Change Requests

In the grant award budget detail page, click on the **gear icon (View Options)** on the right and select **View Change Requests** from the drop-down menu.

**Budgeting** Related

Budget Version  
Approved Revision (3/25/2022)

Date	Threshold	Direct	Cash Match	In-Kind Match
		107,000.00		
		20,000.00		
		7,000.00		
		36,000.00		
		2,000.00		
		26,000.00		

View Options menu:

- Create Revision Draft
- Request Budget Change
- View Change Requests**
- Properties
- Save As Template
- New Message
- View Communication

A new window will open. Click on the drop-down menu indicated on the right and select the type of change request you are interested in viewing: Pending, Approved, or Declined.

**Request Changes**

Budget Change Status (Direct)

Allowed Changes	Changes To Date	Remaining Allowed
10.0%	1.8%	8.2%
11,400.00	2,000.00	9,400.00

Approved Change Requests | Direct

Category	Attachment
Demo	Direct (0)

From Category

From Category	Start Amount	End Amount
100 - Personal Services	21,000.00	20,000.00
200 - Travel	8,000.00	7,000.00

End Category

End Category	Start Amount	End Amount
600 - Other	3,000.00	5,000.00

Justification : BAR Demo for successful project completion

Buttons: Decline Changes(s), Approve Changes(s)

Check the box of the budget change you wish to view and click on the lighter blue bar to expand with the details.

Click **X** on the top right of the Request Changes window to exit.

**Request Changes**

Budget Change Status (Direct)

Allowed Changes	Changes To Date	Remaining Allowed
10.0%	0.5%	9.5%
10,700.00	500.00	10,200.00

Pending Change Requests | Direct

Date	Title	Category	Attachment
<input checked="" type="checkbox"/>	3/31/2022 1:13 PM SAMPLE BAR 1	Direct	(0)
<b>Click here to expand and see details</b>			
From Category		Start Amount	End Amount
100 - Personal Services		20,000.00	19,500.00
End Category		Start Amount	End Amount
300 - Facilities		36,000.00	36,500.00
Justification : SAMPLE BAR 1			
<input type="checkbox"/>	3/31/2022 6:44 PM sample	Direct	(0)

Buttons: Decline Changes(s), Approve Changes(s)