Manage Amendments - Classic Experience

An amendment is a post-award change to a grant. Recipients may initiate certain types of amendments in the GrantSolutions GMM from the "My Grants List" screen. Amendment types may include, but are not limited to supplements, change in staff, budget revisions, carryover requests, change in Recipient address, and more.

Note: Contact the awarding agency for the types of amendments that can be created by a grant recipient.

Amendments are managed in the Classic Experience. To switch to the Classic Experience from the New Experience, use the Avatar Drop Down Menu in the upper right-hand corner of the screen:
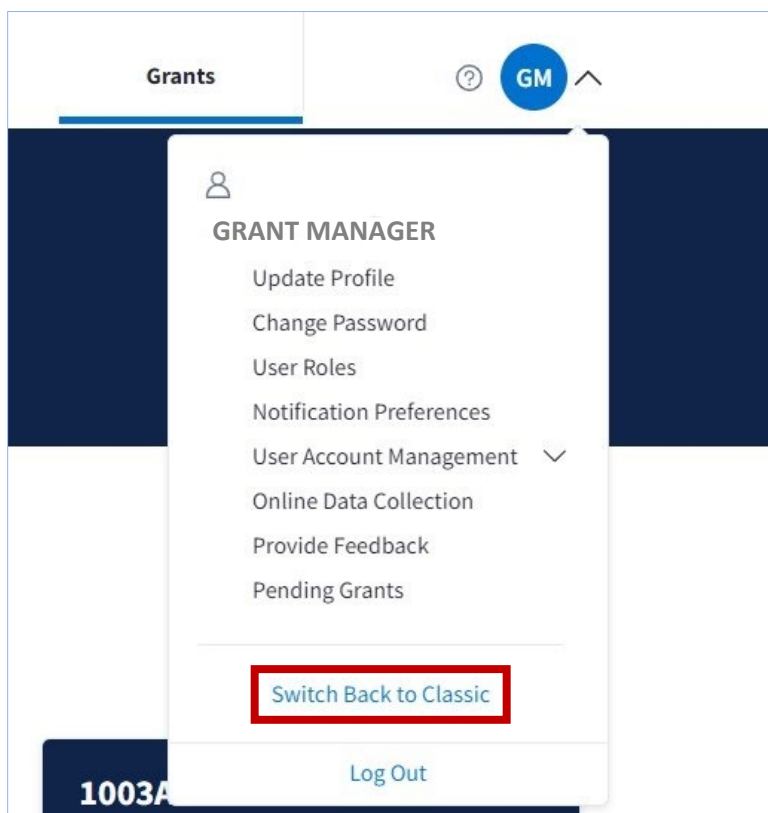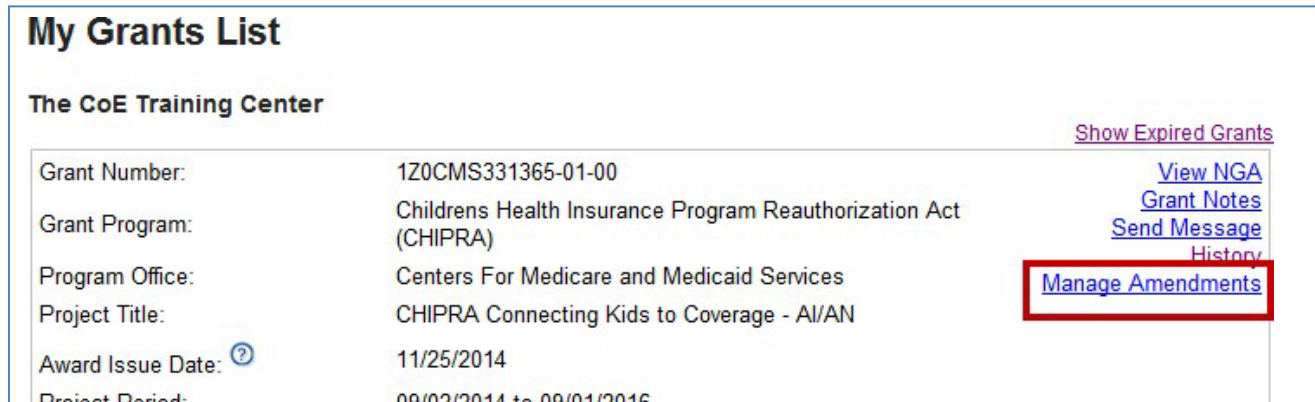

Figure 52: Switch Back to Classic link

To view amendments in progress or to initiate a new amendment, follow the below steps:

1. From the "My Grants List" screen, click the link **Manage Amendments**.
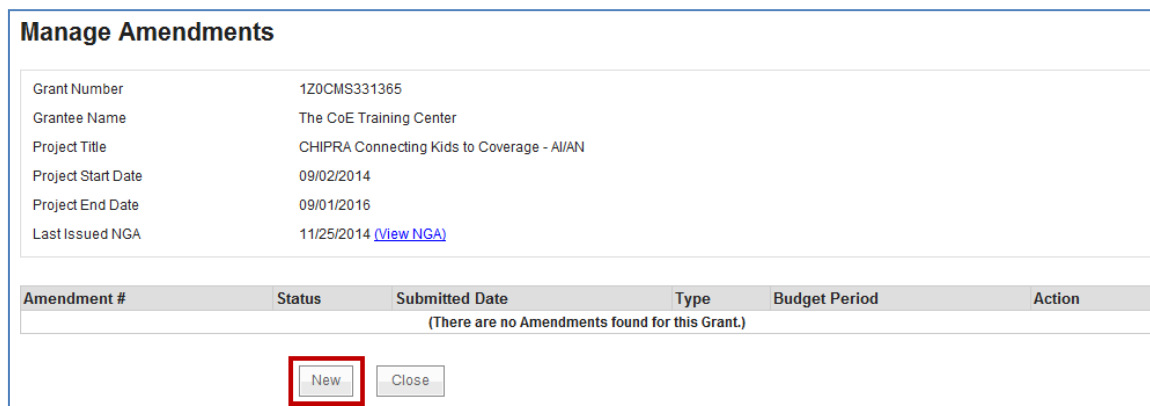
Figure 53: Manage Amendments link

Note: If more than one grant is available from the My Grants List screen, scroll through the page until the desired grant is located.

2. The "Manage Amendments" screen appears. All amendments are initiated and tracked from this screen. To begin a new amendment action, click the **New** button.

Figure 54: Manage Amendments screen - New button

3. The "Select Amendment Type" screen appears. Click the radio button to the left of the desired amendment type, and then click the **Create Amendment** button.

    Important! *The amendment types available to Grantees vary by the awarding agency. As a result, the amendment types on your screen may not match the image below.*

Select Amendment Type

Grant Number	1Z0CMS331365-1
Project Period	09/02/2014 to 09/01/2016
Budget Period	09/02/2014 to 09/01/2015
Amendment Type	○ Extension with Funds (Type 4)
	○ Extension without Funds (Type 4)
	○ Revision (Budget) (Type 6)
	○ Revision (Carryover) (Type 6)
	○ Revision (Change in Scope) (Type 3)
	○ Revision (Change of Address) (Type 6)
	○ Revision (Change of PI/PD) (Type 6)
	○ Revision (EIN) (Type 6)
	○ Revision (NoA Other) (Type 6)
	○ Supplement (Administrative) (Type 3)
	○ Supplement (Programmatic) (Type 3)

Create Amendment   Cancel

Figure 55: Select Amendment Type screen

4. The "GrantSolutions Amendment Application Control Checklist" screen appears. The checklist screen contains the following information:

- **Amendment Type**: The type selected from the "Select Amendment Type" screen

- **Status**: The stage of the Amendment application. Statuses include Work in Progress and Submitted

- **Print Application - Original Submission**: Click the *Original Submission* link to view, print, or save a PDF of the entire application package (completed forms, attachments, etc.)

- **Applicant, grant, and project information:** Read-only information about the award

- **Application Kit**: The application package that includes online forms, enclosures, attachments, and form status

- **Verify Submission**: Submit application

- **Close**: Return to the Mange Amendment screen

Figure 56: GrantSolutions Application Control Checklist screen

5. Once an amendment is created, the status is *Work in Progress*. If an amendment type is selected in error, click the **Close** button from the bottom of the screen to return to the "Manage Amendments" screen.
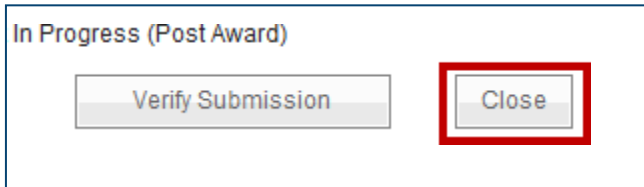

Figure 57: Close button

Optional: The "Manage Amendment" screen appears. Click the Delete Amendment link from the Action column to remove the amendment action.

Note: The Delete Amendment link is only active when the status is Work in Progress.

6. From the "Manage Amendments" screen, click the **Edit Amendment** link to continue working on the amendment action.

Figure 58: Manage Amendments screen - Edit Amendment and Delete Amendments links

7. The "GrantSolutions Amendment Application Control Checklist" screen appears. Scroll to the application kit (application package) section and enter the online forms. The forms in the kit vary depending on the Amendment type.

8. To electronically complete a form in the GrantSolutions GMM, click the **Enter Online** link for the desired form (i.e. SF-424A).

Figure 59: Application Control Checklist - Application Kit (Package) section

Note: Forms vary depending on the Amendment type.

9. The online form opens. Enter all data. When entering dollar amounts, do <u>not</u> use the dollar sign ($) or commas.

Figure 60: SF-424A Online Form

10. When done, scroll to the bottom of the screen and click the **Save** button.

Figure 61: SF-424A - Save button

11. (SF-424A only) – The "Would you like to transfer your budget totals information to the SF-424 form" message appears. Click **Yes**.
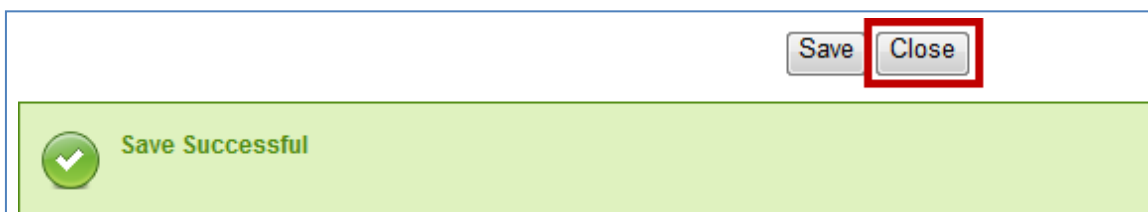
Figure 62: Would you like to transfer your budget totals information to the SF-424 form message

12. If there are no errors, the *Save Successful* message appears at the bottom of the screen.

Note: If there are problems, an error icon (red circle with white exclamation point) ⓘ appears next to the cells that need corrections. To view the error text, point to the error icon with the mouse. Make change and then click the Save button again.

13. Click the **Close** button.

Figure 63: Close button

14. The "GrantSolutions Amendment Application Control Checklist" screen opens. A *Print Completed* link appears below the *Enter Online* link for the form that was just saved. The *Print Completed* link allows the user to open or save that form as a PDF. Additionally, the status column contains a green checkmark, indicating the form was successfully saved.

Figure 64: Application Kit

Status Icons

Status Icon	
✔	In progress or completed. Unless otherwise directed, each item in the kit should have a green check mark before submitting the Amendment. Please note that a green check mark does not mean the information is correct, just that data is entered or attached.
⚠	It is recommended that you complete this item.
⌴	Not started (optional).
✘	The enclosure is not validated (Incomplete).

15. Complete additional forms and attach any necessary files. To attach a file, locate the desired row and click the **Uploaded Files** link from the *Attachments* column.

Figure 65: Attachments column - Uploaded Files link

16. The "Attachments" screen appears. Click the **Upload Attachment** button.

17. The "Attachment – Upload" screen appears in a new window. Enter a file description in the **Description** field, **choose a file** to attach, and click the **Attach** button.

18. The "Attachments" screen appears, and the attachment is visible. Click the **Close** button.

Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: The CoE Training Center
Application Number: (To be assigned)
Project Title: CHIPRA Connecting Kids to Coverage - AI/AN
Project Period: 09/02/2014 to 09/01/2016

Enclosure: Budget Narrative
Number of Attachments: 1

Item Description	Type	Review	Action
Budget Narrative	Upload	Pending	Remove

Upload Attachment   Add Mail-in Item   Close
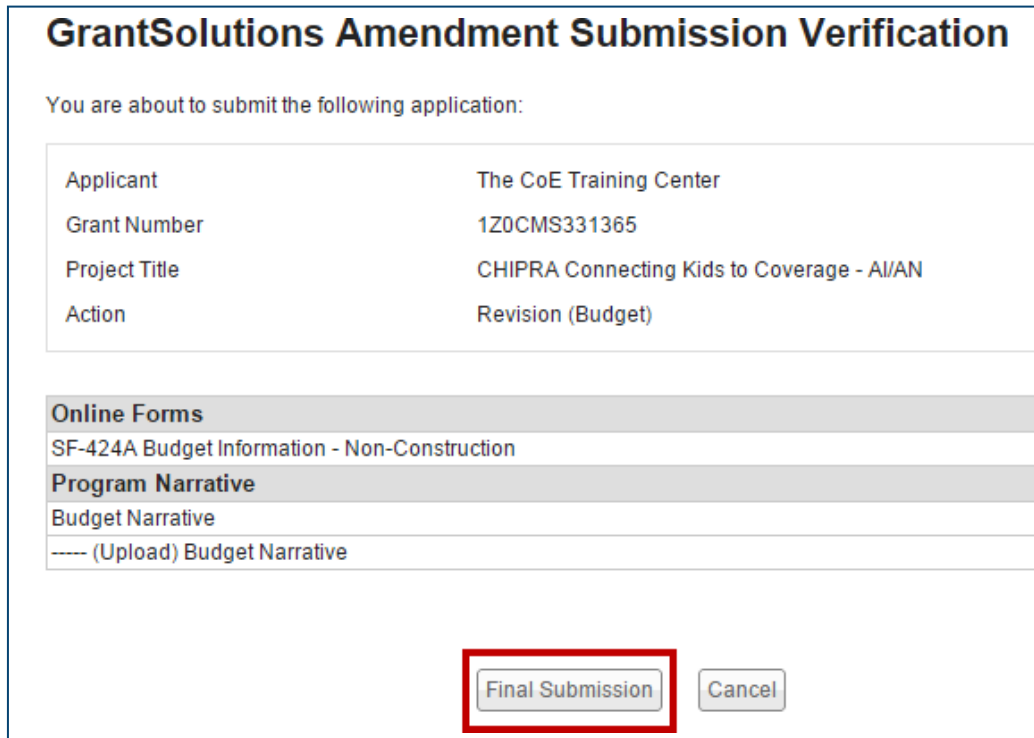
Figure 68: Attachments screen

19. The "GrantSolutions Amendment Application Control Checklist" screen appears. Once all necessary forms are completed, attachments are uploaded, and there are one or more check marks in the *Status* column, click the **Verify Submission** button.

	Enclosure(s)	Attachment(s)	Status
SF-424A Budget Information - Non-Construction	Enter Online / Print Completed / Enter Comments	N/A	✓
Information for the Applicant	**Enclosure(s)**	**Attachment(s)**	**Status**
CMS Amendment Types & Guidance for Submission	View PDF / View Original Version	N/A	⌐
Program Narrative	**Enclosure(s)**	**Attachment(s)**	**Status**
Budget Narrative		1 Uploaded Files / 0 Mail-in Items	✓
Additional Information to be Submitted	**Enclosure(s)**	**Attachment(s)**	**Status**
Cover Letter		0 Uploaded Files / 0 Mail-in Items	⌐

Amendment Package Status: Work In Progress (Post Award)

Verify Submission   Close

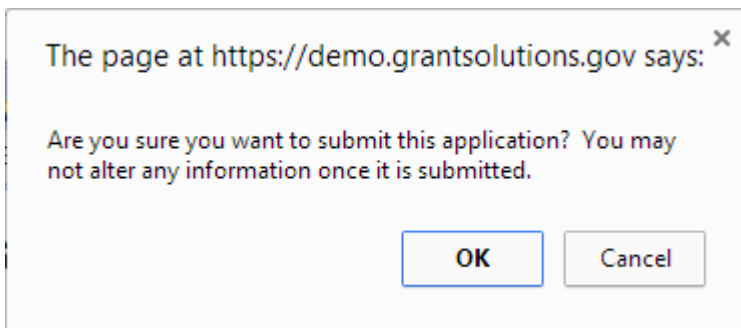**Figure 69: Verify Submission button**

20. The "GrantSolutions Amendment Submission Verification" screen appears. Review the page to ensure all online forms are listed. Click **Final Submission**.

GrantSolutions Amendment Submission Verification

You are about to submit the following application:

Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Action	Revision (Budget)

Online Forms
SF-424A Budget Information - Non-Construction
Program Narrative
Budget Narrative
----- (Upload) Budget Narrative

[Final Submission] [Cancel]

Figure 70: GrantSolutions Amendment Submission Verification screen

21. The "Are you sure you want to submit this application? You may not alter any information once it is submitted" message displays. Click Cancel to return to the previous screen or click **OK** to continue.

The page at https://demo.grantsolutions.gov says:

Are you sure you want to submit this application? You may not alter any information once it is submitted.

[OK] [Cancel]

Figure 71: Warning Message

22. The "Amendment Status Confirmation" screen appears, and the Grantor receives email notification that the amendment application is submitted. Click the **Application Control Checklist** button to return to the now submitted application kit.

Figure 72: Amendment Status Confirmation screen

23. The "GrantSolutions Amendment Application Control Checklist" screen appears. Confirm that the status is *Submitted (Post Award).* Click the **Close** button at the bottom of the screen to return to the Manage Amendments page.

Figure 73: Checklist screen Close button

24. The "Manage Amendments" screen appears. At this point, the Grantee may view the amendment application but cannot perform any actions. As the amendment progresses through the review and approval process, the status updates.

Figure 74: Manage Amendments screen

25. If the Grantor needs the Grantee to make changes to the application, the Grantor can *Return* the amendment for edits.

Assigned users with the roles Grantee Authorizing Official (ADO) and Principle Investigator/Program Director (PI/PD) for the latest issued Notice of Award and for the active budget period receive email notification when an application is returned.

The application status changes to *Work in Progress* and the **Edit Amendment** link is available.

Figure 75: Manage Amendments screen

26. Make any changes and re-submit the amendment application.