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](image-url)
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](image)

*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](image)
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 screen](image_url)

*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 Manage Amendment screen

![GrantSolutions Amendment Application Control Checklist screen](image)

**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](image)

**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](image)

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](image1)

**Note:** Forms vary depending on the Amendment type.

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

![Figure 60: SF-424A Online Form](image2)
10. When done, scroll to the bottom of the screen and click the **Save** button.

![Figure 61: SF-424A - Save button](image)

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](image)

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](image)
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](image)

**Status Icons**

<table>
<thead>
<tr>
<th>Status Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>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.</td>
</tr>
<tr>
<td>!</td>
<td>It is recommended that you complete this item.</td>
</tr>
<tr>
<td>—</td>
<td>Not started (optional).</td>
</tr>
<tr>
<td>✗</td>
<td>The enclosure is not validated (Incomplete).</td>
</tr>
</tbody>
</table>

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](image)
16. The “Attachments” screen appears. Click the **Upload Attachment** button.

![Figure 66: Attachments screen](image)

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.

![Figure 67: Attachment - Upload window](image)
18. The “Attachments” screen appears, and the attachment is visible. Click the Close button.

![Attachments screen](image)

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.

![Verify Submission button](image)
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 screen](image)

**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.

![Warning Message](image)

**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](image)

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](image)
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.

![Manage Amendments screen](image)

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.

![Manage Amendments screen](image)

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