Budget Revisions

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Grantees are reimbursed for grant related expenses by submitting claims in the grants management. The approved budget (created in the application component) carries over to the claims component and creates claim templates. Claims must align with the approved budget; however, the grants management system will allow grantees to overspend grant categories by less than 10% of the total of a budget category. Click on Budget Revision Request Checklist for Grantees for a checklist to assist grantees in submitting a successful budget revision request.

The system will stop claims from being submitted and generate error messages for reimbursement requests exceeding 10% of the total of a budget category. Grantees correct these errors by either changing their reimbursement request or by canceling the claim and submitting a budget revision request.

Budget categories are payroll, benefits, in state travel, out of state travel, contractual services, equipment, repairs and maintenance, rent, utilities, communication, advertising, supplies, insurance, other expenses, client assistance and indirect costs.

- **Client assistance can be overspent with no limit.**
- **Indirect costs cannot be overspent by any amount without a budget revision.**
- **Budget revisions within the last 30 days of a project must be pre-approved.**

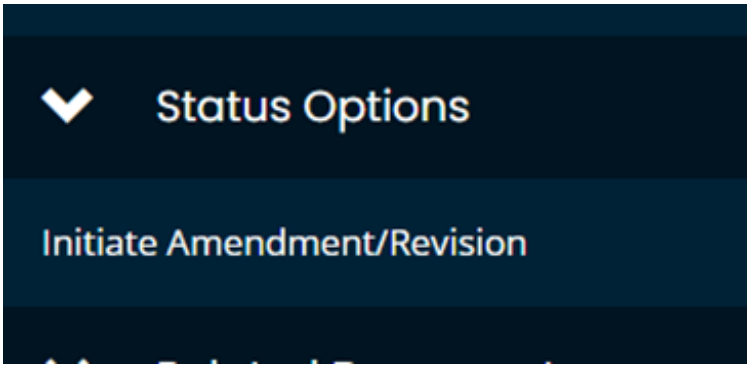
Grantees risk not being reimbursed for expenses which are not included in their approved budget. Grantees must submit budget revisions and obtain prior approval for expenses which could be questioned, disallowed, or are not included in the approved budget.

I. **Budget revision instructions**

Budget revision requests are submitted through the grants management system. Instructions are provided below and can also be downloaded.

Download the amendment/revision instructions.

STEP ONE: From the left navigation panel under status options, click on **initiate amendment/revision.** If there is a claim in any status other than **paid** or **cancelled**, the system will stop the request.

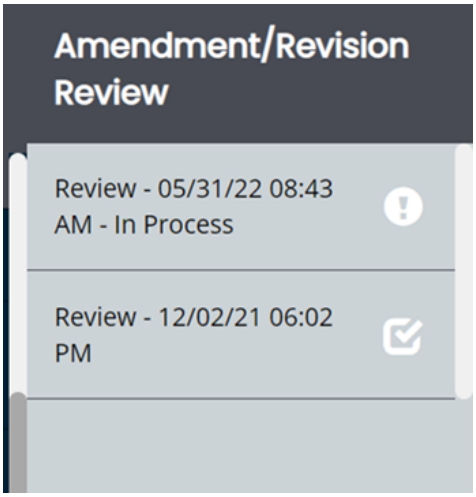


This message will appear in a pop-up box:

Please complete the 'Amendment/Revision Request' form. Upon completion don't forget to submit your amendment/revision request by selecting the 'Submit Amendment/Revision' status option in the left navigation.



STEP TWO: Click on the **amendment request** page in the navigation panel under **Amendments/Revisions**. If there have been other amendments, another navigation panel will open. Select the one named in process.



STEP THREE: On the **amendment request** page, check the budget revision box. You can select more than one box on this page to request multiple changes. For example, you can submit a budget revision request and a name change request at the same time.

STEP FOUR: Download the budget revision form, which is an Excel document. Save the budget revision form to your computer. You must do the following to make the form work:

- click on the editing tab
- select replace and enter = into the find what box
- Choose **replace all** in the **replace with** field box
- Close the dialog box.

STEP FIVE: Enter requested budget changes into the budget changes column and provide justifications for

the changes. Justifications must include detailed information about the changes and explain why changes are requested.

STEP SIX: Once the budget revision form is complete upload it on the **amendment request page**. In the textbox at the bottom of the page, enter a detailed explanation regarding the requested changes and why they are needed. Save the page.

STEP SEVEN: To submit the request, select the status option **submit amendment/revision request** found on the navigation panel. This will forward the request to the assigned grant coordinator for review. Requests can be cancelled at any time by selecting the status option **cancel** found on the navigation panel.

Grant coordinators will either approve the request, send it back for corrections or deny the request.

II. **Budget Revision Reminders:**

1) Utilize the Budget Revision Request Checklist for Grantees to assist you in submitting a successful budget revision request.

2) Do not submit a budget revision for the sole purpose of moving funds to client assistance. The system will allow you to overspend client assistance by more than 10% of the client assistance budget, even if no funds are budgeted and without prior approval from your grant coordinator.

3) Do not submit budget revisions to make year-end adjustments unless you overspend the total of a budget category by 10% or more.

4) Do not submit budget revisions to move line-item expenses within a budget category. For example, payroll is a budget category. You can underspend and overspend payroll lines as much as you want unless you overspend payroll total by 10% or more. Payroll for direct services and payroll for fundraising, administration and prevention are separate budget categories.

5) Do not submit budget revisions to update funding source allocations, i.e., an expense was originally to be paid with state funding is now being paid with federal funding.

6) Do not submit budget revisions to move less than 10% of a budget category, unless those funds are needed in another budget category.

7) Use whole numbers on the budget revision form.

8) Budget revision justifications must be included so it is clear why budget changes are necessary. Justifications help determine if budget revisions are appropriate and if the changes will impact the approved goals/objectives.

9) Budget revisions for unallowable or unreasonable expenses will be denied. Contact your grant coordinator or review allowable expenses in the grant manual for more information.

10) Budget revisions will be completed within 10 business days. Grantees cannot submit claims while budget revisions are being processed.

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