

## How to Request a Budget Change in GrantVantage

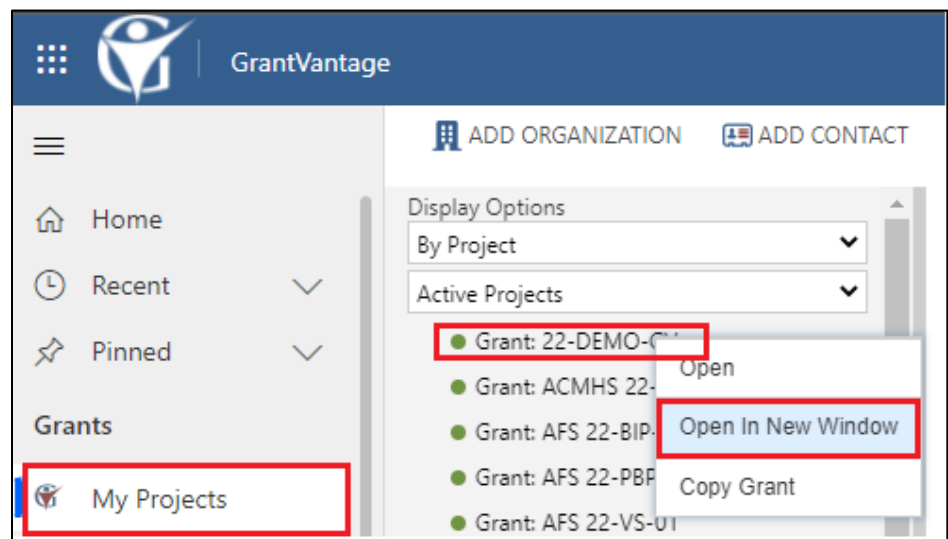
There are two types of changes you might wish to make to your CDVSA budget:

**1) Request a Budget Change** to move funds from one category approved for spending to another category that also has approved funds if you over or underestimated at the start of the year how much money was needed in each of those categories. For example, you may request a budget change to move funds from personnel because you had a vacant position for some months to facilities because utility costs were higher than expected.

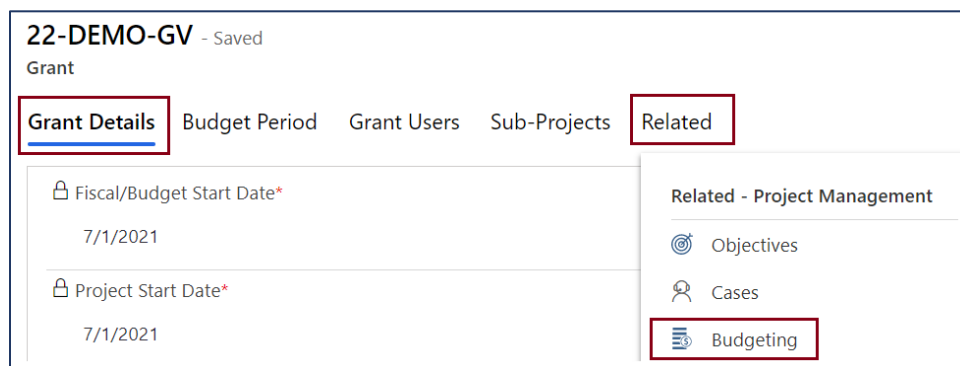
**2) Create a Budget Revision** if you want to move funds from a category approved for spending to a category with no approved funds. For example, you may not have had funds allocated to Equipment but, unexpectedly during the year, find it necessary to replace an expensive item of machinery. A budget revision is also done if there is a need to reduce the total amount of your award because your agency is unable to fully expend the original amount.

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

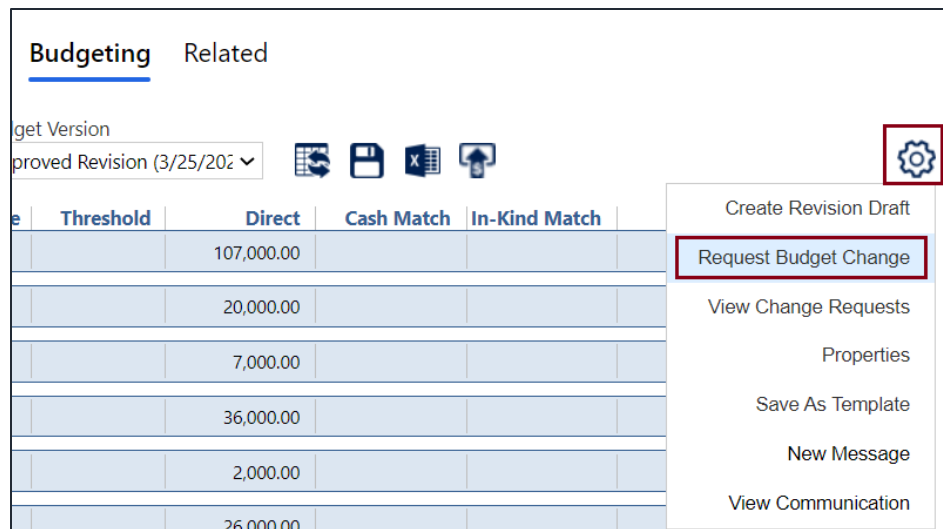
In the menu at the left of your home screen, click on **My Projects** to see a list of your grant awards (NOTE: Project = Grant Award). Right-click on a project you want to open and select **Open in New Window**.



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.

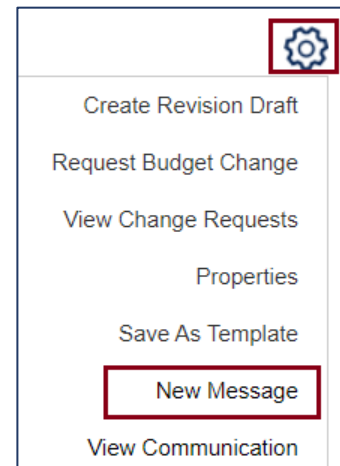


The **Change Request** window will open. Now do the following:

- 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** (more information at end of document, on page 5) text field.
- Click **Request Change**.

The screenshot shows the 'Change Request' window. It has tabs for 'Change Request' and 'Attachment(s)'. The 'Budget Change Status (Direct)' section shows: Allowed Changes (10.0%, 10,700.00), Changes To Date (8.9%, 9,500.00), and Remaining Allowed (1.1%, 1,200.00). The 'New Change Request' section includes: Category Type (Direct), Title (22-DEMO-GV Change Request #1), From Budget Category (100 - Personal Services), To Budget Category (400 - Supplies, 600 - Other), Current Amount (20,000.00, 2,000.00, 5,000.00), and New Amount (19,500.00, 2,250.00, 5,250.00). The 'Change Amount' is 500.00 and the 'Balance Amount' is 0.00. The 'Change Justification' text field contains: 'Type in budget change justification necessary for successful project completion'. At the bottom, there are 'Cancel Change' and 'Request Change' buttons.

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:

- Select the CDVSA Grants Administrator and your Program Coordinator in the **To** field
- Use the same naming convention for your change request in the **Subject** field,
- 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 showing the 'addNewMessage.html' form. The form fields are: From (Subgrantee), To (Grants Administrator), Related To (22-DEMO-GV Change Request #1), Subject (22-DEMO-GV BAR 1), Message Type (For Approval/Review selected), Message (Type in your BAR justification), and Project (22-DEMO-GV). A red box highlights the 'SEND' button at the bottom right.

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

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

End Category

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)

## How to Create a Sufficient Change Justification

To enter a **sufficient Change Justification**, make sure to include the following information:

- What did you budget for in the original budget category that you ended up not needing the funds for, and why?
  - *What was your organization going to do that it didn't do, and what caused this change?*
- Why do you want to move these funds from the original budget category to this other budget category?
  - *What do you need funded that you didn't include in your original budget proposal? Make sure to describe what you want to use the funds for, e.g. the types of supplies to be purchased.*

Below is an example of an insufficient Change Justification:

Underestimated need supplies for this grant.

After some feedback, the following sufficient Change Justification was submitted:

*Subgrantee is requesting to move funds from the Personnel budget line due to the continuing fact we have been unable to fill vacant positions.*

*Subgrantee has underestimated needed supplies and needs to move \$5,000 from Personnel to Supplies under this budget. With these funds, we foresee purchases including SART supplies, Direct Services Advocates office supplies, additional PPE for Advocates responding to the Multidisciplinary Center and hospital emergency departments, printing of brochures giving an overview of services and emergency supports for clients, community outreach for Sexual Assault Awareness Month and training for Direct Services staff.*

Below are two other good examples of a sufficient Change Justification. In these examples, the subgrantee is requesting to move funds from the original budget category to two other budget categories. In both examples, the subgrantee explains **why they do not need the funds originally allocated** to the original budget category, and detail **how they intend to use the funds** for each new budget category the funds are allocated to in a brief and concise way.

*Subgrantee* is requesting to move \$35,000 from Personnel to Supplies and Other budget lines. Due to not being able to fill vacant positions we have more money in Personnel than we can use by the end of the fiscal year, and request to be able to move it to the Supplies and Other categories.

We would request to move \$10,000 to Supplies and \$25,000 to Contractual. This will allow us to purchase supplies including office supplies and equipment, outreach supplies, Prevention Direct Services supplies.

Contractual expenses include higher than estimated insurance costs, contracted IT expenses, audit expenses, financial shared services expenses, printer lease, background checks and fingerprinting expenses.

*Subgrantee* is requesting to move \$5,000 from Personnel to Supplies and \$3,000 from Personnel to Travel. Due to not being able to fill vacant positions we have more money in Personnel than we can use, and request to be able to move it to the Supply line.

When drafting the budgets for the fiscal year, no funds were included for supplies, as we expected to get additional funds from other sources. Those sources have been depleted and we are still in need of supplies, including organizational expenses, office supplies, Direct Services supplies, automated systems and technology and maintenance, repair and replacement of essential items.

*Subgrantee* will use funds in the Travel budget line for allowable expenses such as staff mileage reimbursement, client travel needs and staff travel for training.