

# How to Request a Budget Change in GrantVantage

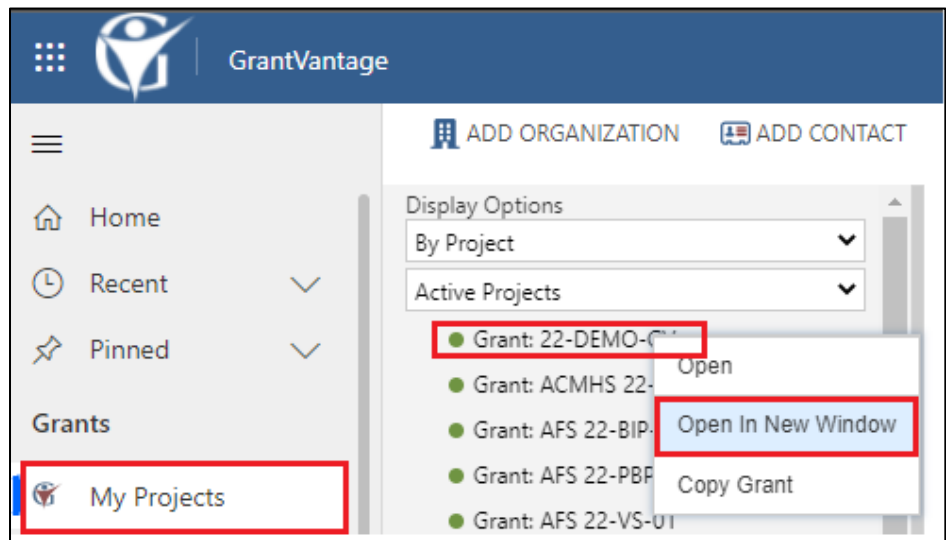
There are two types of changes you might wish to make to your CDVSA budget:

**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.

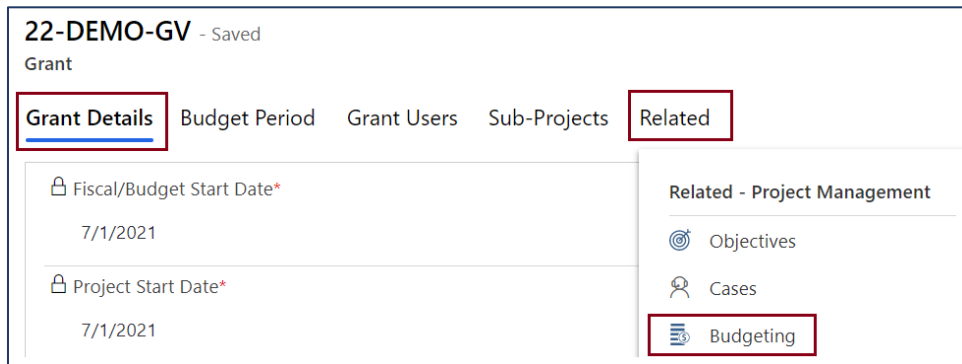
**2) Create a Budget Revision** if you want to move funds from a category approved for spending to a category with no approved funds. For example, you may not have had funds allocated to Equipment but, unexpectedly during the year, find it necessary to replace an expensive item of machinery. A budget 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.

**Budgeting** Related

Get Version  
Approved Revision (3/25/2022)

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**

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

Current Amount	New Amount
20,000.00	19,500.00

+ To Budget Category: 400 - Supplies

Current Amount	New Amount
2,000.00	2,250.00

+ To Budget Category: 600 - Other

Current Amount	New Amount
5,000.00	5,250.00

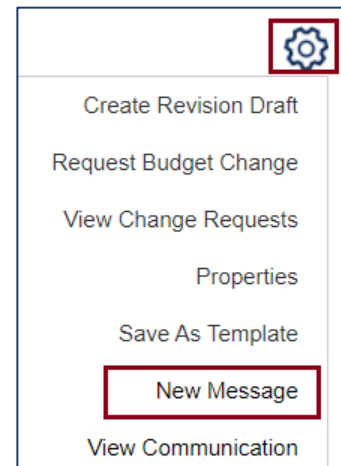
**Change Amount**: 500.00

**Balance Amount**: 0.00

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

Cancel Change | **Request Change**

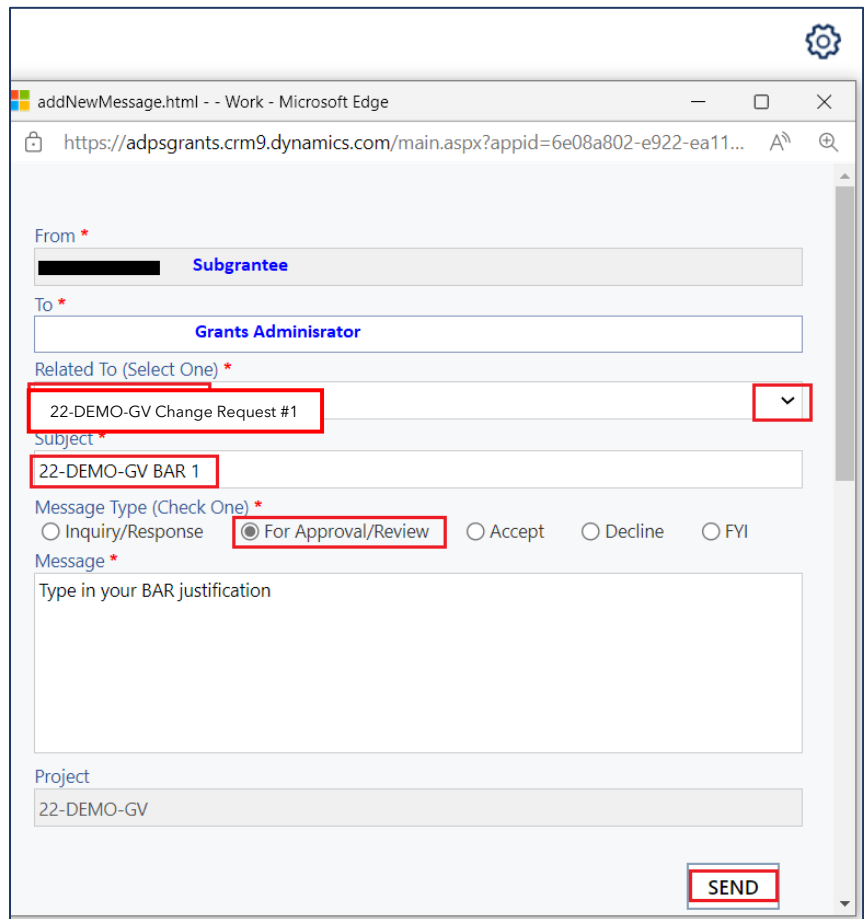
After you click the **Request Change** button, you are back in the **Budgeting** detail page. Click on the **gear icon (View Options)** and select **New Message** from the dropdown menu.



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:

- 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**



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:

- 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

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)

Decline Changes(s) | Approve Changes(s)