

Date Amendments: Changing Start and End Dates in Grants Management

Purpose

The purpose of this procedure is to outline the steps to take when changing dates on the project, task, and award in the grants management module of the Research Foundation (RF) business applications.

Background

An account relationship consists of a project/task/award (and installment) combination. The overlapping period of the project/task/award and installment(s) defines the time period available for transactions. Therefore, when processing a date change the project/task/award and installment(s) must be changed in order for the "new" time period to be created.

Date changes can be processed for a variety of reasons, including amendments received from sponsors, pre-award costs, automatic renewal authorization, etc.

Factors to Consider

Transactions

When you change dates, you must first decide if transactions (expenditures or encumbrances) exist that are outside the "new" time period. If transactions exist that are not within the time period to be established, the appropriate department must be notified and the transactions must be reviewed and appropriate actions taken prior to changing dates.

Transferred transactions still exist as transaction lines and will prohibit some parts of the account relationship (project/task/award/installments) from being changed. These items can be changed to the last transaction item date. For example,

Situation

- New end date is 10/31/04.
- Previous end date was 12/31/04.
- Payroll encumbrance exists dated 12/1/04.
- Payroll encumbrances are moved.

Resolution

- You will successfully be able to change the project/ task/installment(s) to 10/31/04.
- However, functionality on the award date will still read the transaction lines. Therefore, the award date will only be able to be changed to 12/1/04.

Budget Periods

Some date changes may require the existing award budget to be moved to a budget period that corresponds with the new time period for the account relationship. For example, if the start date is changing from 10/1/04 to 12/1/04, the budget currently is entered in OCT-04 budget column and would need to be moved to the DEC-04 budget column.

Baselining the Budget

All date changes require the successful baselining of the award budget.

Required Steps in the RF Business Applications

The following chart outlines the steps to take in the RF business applications for each type of date change that may be requested.

	START DATE CHANGES		END DATE CHANGES	
Steps	Roll Forward	Rollback	Extension	Rollback
1 - Perform Preliminary Review	Check to see if transactions exist outside of the date range. Verify that award budget is entered in a budget period that corresponds with the new project/task/award period. Amend if needed.	None. Note: Rolling back only the project or task will change the account relationship time period.	NONE	Check to see if transactions exist outside of the date range.
2 - Adjust Project/Task	Roll-forward task start date Save Roll-forward project start date Save	Rollback project start date Save Rollback task start Date Save	Extend project completion date Save Extend task end date Save	Rollback task start date Save rollback Project start date (if applicable) Save
3 - Adjust Award/Installment(s)	Roll-forward installment start date Save Roll-forward award start date Save	Rollback award start date Save Rollback installment(s) date Save	Extend award close date Save Extend award end date Save Extend installment(s) close date Save Extend installment(s) end date Save	Rollback Installment(s) end date Save Rollback Installment(s) close date Save If allowable, rollback award end date and then close date Save
4 - Baseline Budget	Baseline award budget	Baseline Award Budget	Baseline award budget	Baseline Award Budget

Change History

- **February 6, 2006** - Updated to remove requirement for baselining project budgets.
- **November 23, 2004** - Revised to clarify functionality of date amendments and add date amendment table. Changed name from Date Extension Procedures to Date Amendments - Changing Start and End Dates in Grants management.

Feedback

Was this document clear and easy to follow? Please send your feedback to webfeedback@rfsuny.org.

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