SUNY RF

Date Amendments - Process Help

Use these instructions to change dates on a; project, task, and award in 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 10/31/20.
- Previous end date was 12/31/20.
- Payroll encumbrance exists dated 12/1/20.
- Payroll encumbrances are moved.

Resolution

- You will successfully be able to change the project/ task/installment(s) to 10/31/20.
- However, functionality on the award date will still read the transaction lines. Therefore, the award date will only be able to be changed to 12/1/20.

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 10/1/20 to 12/1/20, the budget currently is entered in OCT-20 budget column and would need to be moved to the DEC-20 budget column.

Baselining the Budget

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

To roll forward a start date:

1. Navigate to **Award Summary Inquiry** to open the **ASI**.
2. Enter **Award** number and click the **Submit** button then refresh until status shows as "Completed" then click the **View** button.
3. In the dropdown menu, select **Project**. Use the **Select a Project** button to select the project. In the same box, use the new dropdown menu and select **Task** and then repeat this process for the task.
4. Click the left box to view expenditures. See if any 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.

5. Navigate to **Awards, click Open** to open the **Find Awards** form.
6. Enter the **Award** number.
7. Click **Find** to open the Award Management Folder form.
8. Click **Open** to open the Award Management form

9. Roll forward the award start date and installment start date

10. Click **File > Save.**
11. Select **File > Close Form**
12. Baseline the award budget (See instructions below)

To Rollback a Start date:

Note: Rolling back only the project or task will change the account relationship time period.

1. Navigate to **Projects** to open the **Find Projects** form.
2. Enter the Project Number.
3. Click **Find** to go to the **Projects, Templates Summary** window.
4. Click in the row that contains the project to be modified.
5. Click **Open** to go to the **Projects, Templates** window.
6. On the Project management screen, rollback project start date

7. Click the box to the right of Tasks to open tasks

8. Rollback task start date
9. Click **File > Save**
10. Close tasks screen

11. Click **File > Save**

12. Navigate to **Awards, click Open** to open the **Find Awards** form.

13. Enter the **Award** number.

14. Click **Find** to open the Award Management Folder form.

15. Click **Open** to open the Award Management form

16. Rollback the award start date and installment start date

17. Click **File > Save.**

18. Select **File > Close Form**

19. Baseline the award budget (See instructions below)

To extend an end date:

1. Navigate to **Projects** to open the **Find Projects** form.
2. Enter the Project Number.
3. Click **Find** to go to the **Projects, Templates Summary** window.
4. Click in the row that contains the project to be modified.
5. Click **Open** to go to the **Projects, Templates** window.
6. On the Project management screen, extend the project end date.

7. Click the box to the right of Tasks to open tasks

8. Extend task end date
9. Click **File > Save**
10. Close tasks screen

11. Navigate to **Awards, click Open** to open the **Find Awards** form.
12. Enter the **Award** number.
13. Click **Find** to open the Award Management Folder form
14. Click **Open** to open the Award Management form

15. Extend award close date
16. Click **File > Save**

17. Extend award end date
18. Click **File > Save**

19. Extend installment close date
20. Click **File > Save**

21. Extend installment end date
22. Click **File > Save**

23. Click **File > Save.**
24. Select **File > Close Form**
25. Baseline the award budget (See instructions below)

To rollback an end date:

1. Navigate to **Award Summary Inquiry** to open the **ASI**.
2. Enter **Award** number and click the **Submit** button then refresh until status shows as "Completed" then click the **View** button.
3. In the dropdown menu, select **Project**. Use the **Select a Project** button to select the project. In the same box, use the new dropdown menu and select **Task** and then repeat this process for the task.
4. Click the left box to view expenditures. See if any 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.

5. Navigate to **Projects** to open the **Find Projects** form.
6. Enter the Project Number.
7. Click **Find** to go to the **Projects, Templates Summary** window.
8. Click in the row that contains the project to be modified.
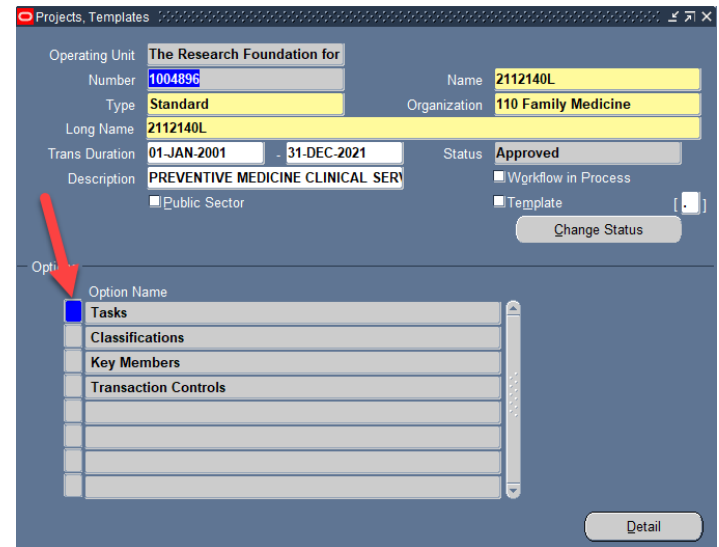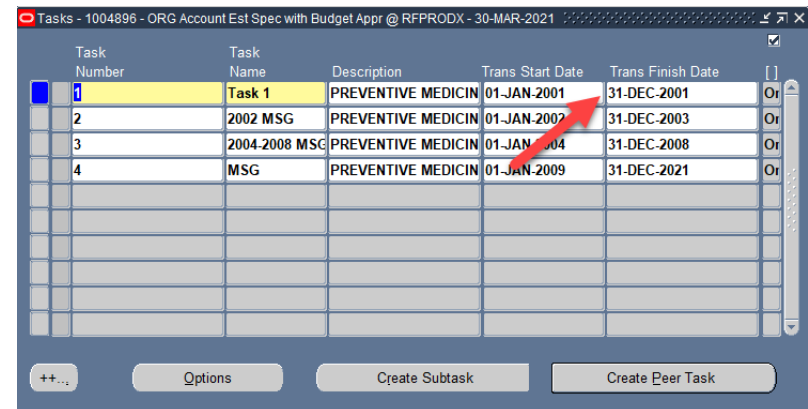9. Click **Open** to go to the **Projects, Templates** window.
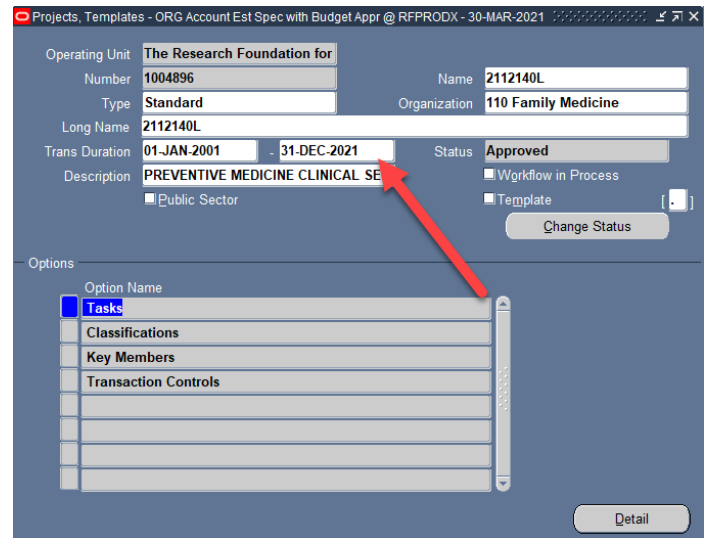
10. Click the box to the right of Tasks to open tasks
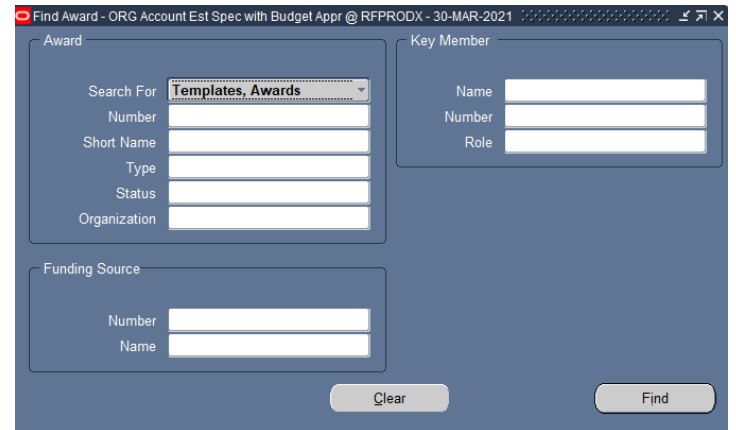

11. Rollback task end date
12. Click **File > Save**
13. Close tasks screen

14. On the Project management screen, rollback project end date
15. Click **File > Save**

16. Navigate to **Awards, click Open** to open the **Find Awards** form.
17. Enter the **Award** number.
18. Click **Find** to open the Award Management Folder form
19. Click **Open** to open the Award Management form

20. Rollback the installment end date
21. Click **File > Save**
22. Rollback the installment close date
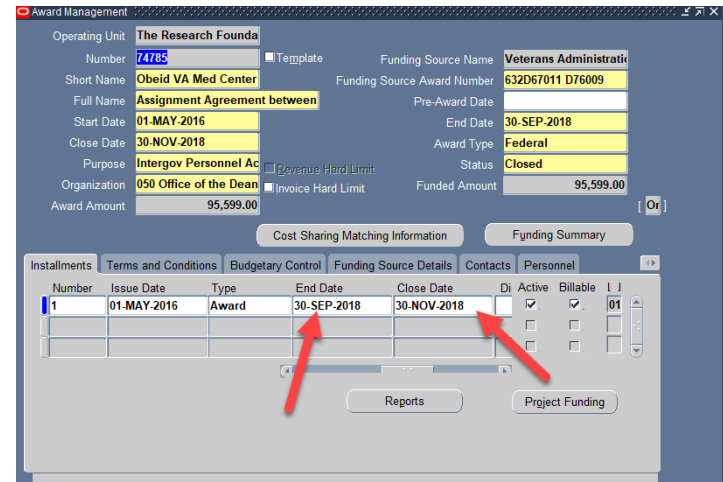
23. Click **File > Save.**
24. Select **File > Close Form**
25. Baseline the award budget (See instructions below)

Baselining an Award Budget

1. Select **Budgets > Award Budgets** to open the **Award Budgets** form.
2. Enter the award number in the **Award Number** field on the **Award Budgets** form.
3. Press **TAB**.

   Note: The system will automatically fill in the **Award Name**, **Project Number**, **Project Name** and **Budget Type** fields. If there are multiple projects associated with the award, you'll need to select the project you want from the List of Values.

4. Click **Find Draft**.
5. Enter the following fields on the **Award Budgets** form (Optional):
   - Version Name. Enter the version of the budget being created. If this is the initial budget, enter **Original Budget**.

- Change Reason. Date Change.
- Description. An additional explanation of why the budget is being modified.
- Status. This field displays **Working** when you enter or update a draft award or project budget. This field displays **Submitted** when you submit a draft award or project budget and reverts back to **Working** once you submit and baseline the budget.