



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.

Expenditure Category	BC Level	Budget	Actual	Encumbered	Available
Salaries and Wages Regular	MIX	6,500.00	1,500.00	.00	5,000.00
Salaries and Wages Summer	MIX	1,500.00	4,678.91	.00	-3,178.91
Salaries and Wages Grad	MIX	24,000.00	25,602.28	.00	-1,602.28
Salaries and Wages IFR	MIX	415.00	415.00	.00	.00
..Total Salaries and Wages..		32,415.00	32,196.19	.00	219.81
Fringe Benefits Regular	MIX	2,763.00	637.50	.00	2,125.50
Fringe Benefits Summer	MIX	881.00	795.42	.00	85.58
Fringe Benefits Grad	MIX	3,840.00	3,709.81	.00	130.19
Fringe Benefits IFR	MIX	244.00	243.81	.00	.19
..Total Fringe Benefits..		7,728.00	5,386.54	.00	2,341.46
Supplies	MIX	341.00	407.92	.00	-66.92
Travel	MIX	.00	352.93	.00	-352.93
Relocation	MIX	750.00	.00	.00	750.00
Tuition and Fees	MIX	1,606.00	1,606.00	.00	.00
Undistributed Budget	MIX	8,249.33	.00	.00	8,249.33
..Total Other..		10,946.33	2,366.85	.00	8,579.48
..TOTAL Direct Costs..		51,089.33	39,949.58	.00	11,139.75

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

Find Award - ORG Account Est Spec with Budget Appr @ RFPRODX - 30-MAR-2021

Award

Search For: **Templates, Awards**

Number:

Short Name:

Type:

Status:

Organization:

Key Member

Name:

Number:

Role:

Funding Source

Number:

Name:

Clear Find

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)

The screenshot displays the 'Award Management' application window. The top section contains various fields for award information, including Operating Unit, Number, Short Name, Full Name, Start Date, Close Date, Purpose, Organization, and Award Amount. A red arrow points to the 'Start Date' field, which is currently set to '01-MAY-2016'. Below this, there is a table with columns for 'Number', 'Issue Date', 'Type', 'Start Date', 'End Date', 'Active', 'Billable', and 'L I'. The first row of the table shows '1', '01-MAY-2016', 'Award', '01-MAY-2016', '30-SEP-2018', and '01'. A red arrow points to the 'Start Date' column in the table. At the bottom of the window, there are buttons for 'Reports' and 'Project Funding'.

Number	Issue Date	Type	Start Date	End Date	Active	Billable	L I
1	01-MAY-2016	Award	01-MAY-2016	30-SEP-2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01

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

Find Projects

Project

Search For: **Projects, Templates**

Number: []

Name: []

Long Name: []

Type: []

Organization: []

Status: []

Product Source: []

Source Reference: []

Key Member

Name: []

Number: []

Role: []

Customer

Name: []

Number: []

Relationship: []

Classification

Category: []

Class Code: []

Clear Find

Projects, Templates - ORG Account Est Spec with Budget Appr @ RFPROD - 30-MAR-2021

Operating Unit: **The Research Foundation for**

Number: **1004896** Name: **2112140L**

Type: **Standard** Organization: **110 Family Medicine**

Long Name: **2112140L**

Trans Duration: **01-JAN-2001 - 31-DEC-2021** Status: **Approved**

Description: **PREVENTIVE MEDICINE CLINICAL SER**

Public Sector Workflow in Process Template

Change Status

Options

Option Name

Tasks

Classifications

Key Members

Transaction Controls

Detail

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

The screenshot shows the 'Projects, Templates' window. The project details are as follows:

Operating Unit	The Research Foundation for		
Number	1004896	Name	2112140L
Type	Standard	Organization	110 Family Medicine
Long Name	2112140L		
Trans Duration	01-JAN-2001 - 31-DEC-2021	Status	Approved
Description	PREVENTIVE MEDICINE CLINICAL SER		
	<input type="checkbox"/> Public Sector	<input type="checkbox"/> Workflow in Process	<input type="checkbox"/> Template

Below the details is an 'Options' section with a list of options:

- Tasks
- Classifications
- Key Members
- Transaction Controls

A red arrow points to the 'Tasks' option. A 'Change Status' button is visible at the bottom right of the options section.

8. Rollback task start date

9. Click **File > Save**

10. Close tasks screen

The screenshot shows the 'Tasks' window with the following table:

Task Number	Task Name	Description	Trans Start Date	Trans Finish Date	
1	Task 1	PREVENTIVE MEDICIN	01-JAN-2001	31-DEC-2001	Or
2	2002 MSG	PREVENTIVE MEDICIN	01-JAN-2002	31-DEC-2003	Or
3	2004-2008 MSG	PREVENTIVE MEDICIN	01-JAN-2004	31-DEC-2008	Or
4	MSG	PREVENTIVE MEDICIN	01-JAN-2009	31-DEC-2021	Or

A red arrow points to the 'Trans Start Date' column. At the bottom of the window are buttons for '+...', 'Options', 'Create Subtask', and 'Create Peer Task'.

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)

Number	Issue Date	Type	Start Date	End Date	Active	Billable	L I
1	01-MAY-2016	Award	01-MAY-2016	30-SEP-2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01

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.

Find Projects

Project

Search For: **Projects, Templates**

Number: []

Name: []

Long Name: []

Type: []

Organization: []

Status: []

Product Source: []

Source Reference: []

Key Member

Name: []

Number: []

Role: []

Customer

Name: []

Number: []

Relationship: []

Classification

Category: []

Class Code: []

Clear Find

Projects, Templates - ORG Account Est Spec with Budget Appr @ RFPRODX - 30-MAR-2021

Operating Unit: **The Research Foundation for**

Number: **1004896** Name: **2112140L**

Type: **Standard** Organization: **110 Family Medicine**

Long Name: **2112140L**

Trans Duration: **01-JAN-2001** - **31-DEC-2021** Status: **Approved**

Description: **PREVENTIVE MEDICINE CLINICAL SE**

Public Sector Workflow in Process Template

Change Status

Options

Option Name

- Tasks**
- Classifications**
- Key Members**
- Transaction Controls**
-
-
-

Detail

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

The screenshot shows a form titled "Projects, Templates". The form contains several fields: "Operating Unit" (The Research Foundation for), "Number" (1004896), "Name" (2112140L), "Type" (Standard), "Organization" (110 Family Medicine), "Long Name" (2112140L), "Trans Duration" (01-JAN-2001 - 31-DEC-2021), "Status" (Approved), and "Description" (PREVENTIVE MEDICINE CLINICAL SER). There are also checkboxes for "Public Sector" and "Template". A "Change Status" button is located at the bottom right. Below the form is an "Options" section with a list of options: "Tasks", "Classifications", "Key Members", and "Transaction Controls". The "Tasks" option is selected, and a red arrow points to the blue box next to it. A "Detail" button is located at the bottom right of the options section.

8. Extend task end date

9. Click **File > Save**

10. Close tasks screen

The screenshot shows a table titled "Tasks - 1004896 - ORG Account Est Spec with Budget Appr @ RFFRODX - 30-MAR-2021". The table has the following columns: "Task Number", "Task Name", "Description", "Trans Start Date", and "Trans Finish Date". The data is as follows:

Task Number	Task Name	Description	Trans Start Date	Trans Finish Date
1	Task 1	PREVENTIVE MEDICIN	01-JAN-2001	31-DEC-2001
2	2002 MSG	PREVENTIVE MEDICIN	01-JAN-2002	31-DEC-2003
3	2004-2008 MSG	PREVENTIVE MEDICIN	01-JAN-2004	31-DEC-2008
4	MSG	PREVENTIVE MEDICIN	01-JAN-2009	31-DEC-2021

A red arrow points to the "Trans Finish Date" cell for "Task 1". At the bottom of the table, there are buttons for "++...", "Options", "Create Subtask", and "Create Peer Task".

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**

Number	Issue Date	Type	Start Date	End Date	Active	Billable	L J
1	01-MAY-2016	Award	01-MAY-2016	30-SEP-2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01

17. Extend award end date

18. Click **File > Save**

The screenshot shows the 'Award Management' application window. The top section contains various fields for award information:

- Operating Unit: The Research Founda
- Number: 74785
- Funding Source Name: Veterans Administrati
- Short Name: Obeid VA Med Center
- Funding Source Award Number: 632D67011 D76009
- Full Name: Assignment Agreement between
- Pre-Award Date: (empty)
- Start Date: 01-MAY-2016
- End Date: 30-SEP-2018 (highlighted with a red arrow)
- Close Date: 30-NOV-2018
- Award Type: Federal
- Purpose: Intergov Personnel Ac
- Status: Closed
- Organization: 050 Office of the Dean
- Funded Amount: 95,599.00
- Award Amount: 95,599.00

Below the fields are buttons for 'Cost Sharing Matching Information' and 'Funding Summary'. A tabbed interface at the bottom includes 'Installments', 'Terms and Conditions', 'Budgetary Control', 'Funding Source Details', 'Contacts', and 'Personnel'. The 'Installments' tab is active, showing a table with the following data:

Number	Issue Date	Type	Start Date	End Date	Active	Billable	I	J
1	01-MAY-2016	Award	01-MAY-2016	30-SEP-2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01	
					<input type="checkbox"/>	<input type="checkbox"/>		
					<input type="checkbox"/>	<input type="checkbox"/>		

At the bottom of the window are buttons for 'Reports' and 'Project Funding'.

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)

The screenshot shows the 'Award Management' application window. The 'Installments' tab is active, displaying a table with the following data:

Number	Issue Date	Type	End Date	Close Date	Active	Billable	I	J
1	23-JAN-2015	Award	30-APR-2016	29-JUN-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

A red arrow points to the 'Close Date' field in the first row, which is currently set to 29-JUN-2016.

The screenshot shows the 'Award Management' application window. The 'Installments' tab is active, displaying a table with the following data:

Number	Issue Date	Type	End Date	Close Date	Active	Billable	I	J
1	23-JAN-2015	Award	30-APR-2016	29-JUN-2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

A red arrow points to the 'End Date' field in the first row, which is currently set to 30-APR-2016.

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.

The screenshot shows a web form titled "Find Awards". It includes a search bar for "Award Number" (highlighted in yellow), a "Status" dropdown, and fields for "Last Run On" and "Last Run By". There are three buttons: "Submit", "Refresh", and "View". A checkbox at the bottom is labeled "Re-process ALL encumbrances and expenditures for the life of the award".

The screenshot shows the "Award Summary Inquiry" form. At the top, it displays "Award: 67482", "Start: 01.APR.2014", "End: 31.MAR.2019", and "Current as of: 02/21/2019 09:53:28". Below this, it shows "Amount: 2,549.23" and "Funded: 2,549.23". There is an "Exit Form" button. The form has two main sections: "Projects" and "Tasks". The "Projects" section has a dropdown menu set to "Projects" and a "Select a project" button. The "Tasks" section has a dropdown menu set to "Task Details" and a "Select a task" button.

Award Summary Inquiry - ORG Account Est Spec with Budget Appl @ RFRPRODX - 30-MAR-2021

Award: 67462 Start: 01-JAN-2014 End: 31-DEC-2014 Shortages Current as of: 04/07/2015 09:58:51

Award Budgetary Control Level: Absolute

Expenditure Category	DC Level	Absolute			
		Budget	Actual	Encumbered	Available
Salaries and Wages Budget	MIX	6,500.00	1,500.00	.00	5,000.00
Salaries and Wages Summer	MIX	1,500.00	4,678.91	.00	3,178.91
Salaries and Wages Grad	MIX	24,000.00	25,602.28	.00	1,602.28
Salaries and Wages IFR	MIX	415.00	415.00	.00	.00
~Total Salaries and Wages~		32,415.00	32,196.19	.00	.91
Fringe Benefits Regular	MIX	2,763.00	637.50	.00	2,125.50
Fringe Benefits Summer	MIX	881.00	795.42	.00	85.58
Fringe Benefits Grad	MIX	3,840.00	3,709.81	.00	130.19
Fringe Benefits IFR	MIX	244.00	243.81	.00	.19
~Total Fringe Benefits~		7,728.00	5,386.54	.00	2,341.46
Supplies	MIX	341.00	407.92	.00	66.92
Travel	MIX	.00	352.93	.00	352.93
Relocation	MIX	750.00	.00	.00	750.00
Tuition and Fees	MIX	1,606.00	1,606.00	.00	.00
Undistributed Budget	MIX	8,249.33	.00	.00	8,249.33
~Total Other~		10,946.33	2,366.85	.00	8,579.48
~TOTAL Direct Costs~		51,089.33	39,949.58	.00	11,139.75

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.

Find Projects

Project

Search For: **Projects, Templates**

Number:

Name:

Long Name:

Type:

Organization:

Status:

Product Source:

Source Reference:

Classification

Category:

Class Code:

Key Member

Name:

Number:

Role:

Customer

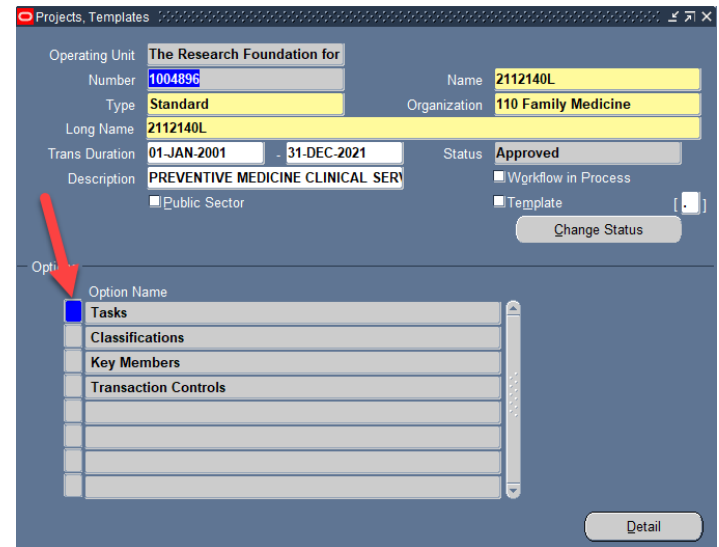
Name:

Number:

Relationship:

Clear Find

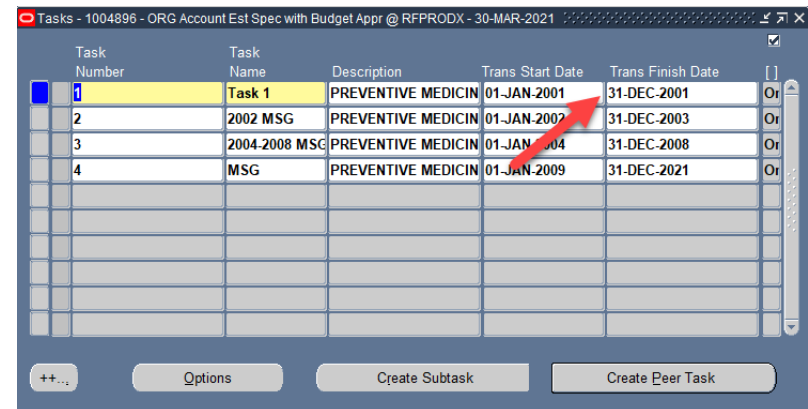
10. Click the box to the right of Tasks to open tasks



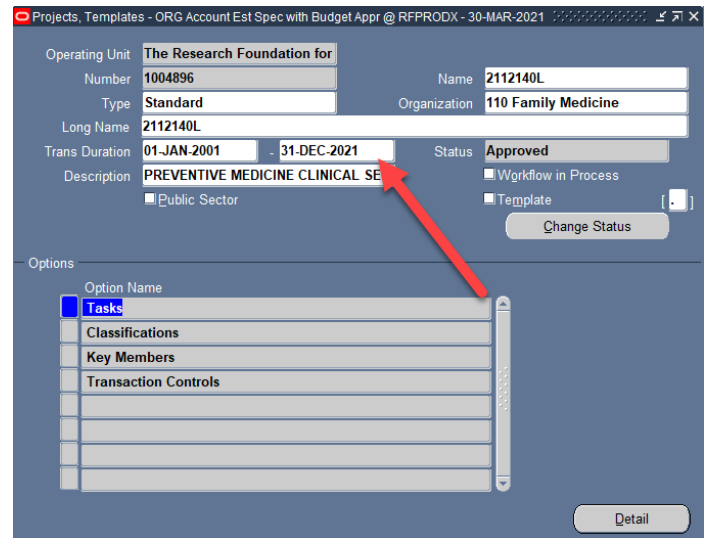
11. Rollback task end date

12. Click **File > Save**

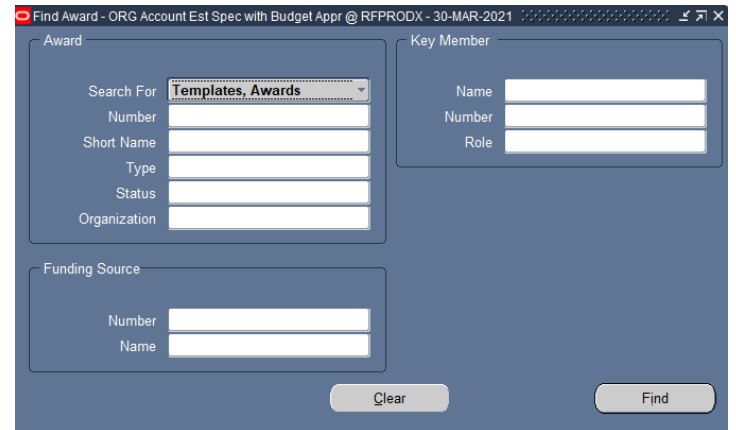
13. Close tasks screen



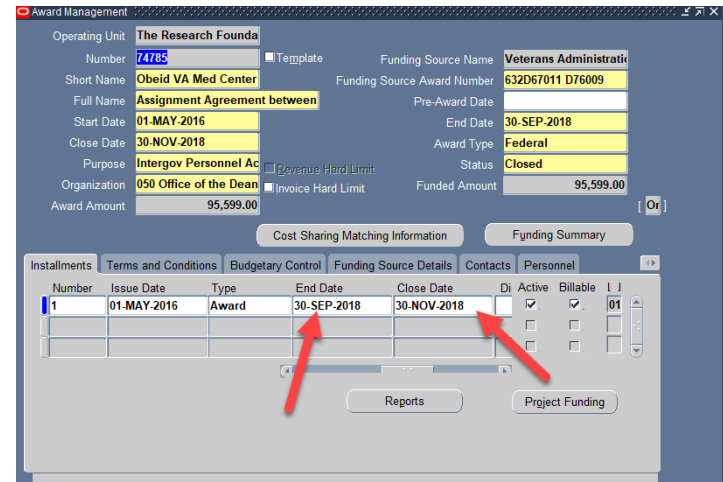
- 14. On the Project management screen, rollback project end date
- 15. Click **File > Save**



- 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**.

The screenshot shows the 'Award Budgets' form in the 'ORG Account Establishment Administrator' application. The 'Find Budget' section contains the following fields: Award Number (000036), Project Number (1056459), Budget Type (Approved Cost Budget), Award Name (660 IDC Revenue), and Project Name (660 Indirect Cost Award). A red arrow points to the 'Find Draft' button. Below this is the 'Draft Budget' section with fields for Version Name, Change Reason, Description, and Status. There is also a checkbox for 'New Original'. The 'Entry Options' section includes 'Entry Method' and 'Resource List'. At the bottom, there is a 'Totals' table with columns for UOM, Quantity, Raw Cost, Burdened Cost, and Revised Date. The table has two rows: 'Draft' and 'Current'. At the very bottom, there are buttons for 'History', 'Copy Actual ...', 'Rework', 'Submit', and 'Details'.

The screenshot shows the 'Change Reasons' dialog box. It has a search field labeled 'Find%' and a list of change reasons. The first item, 'Additional Funds', is highlighted. Other items in the list include 'Carry Forward', 'Create At Risk Budget for APT', 'Date Change', 'Official Award Amount', 'Rebaseline for GMS Balances', 'Reduction of Funds', and 'Transfer of Funds'. At the bottom of the dialog are 'Find', 'OK', and 'Cancel' buttons.

- 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.

Award Budgets - ORG Account Establishment Administrator @ TRAINX - 16-MAY-2019

Find Budget

Award Number: 000036 Award Name: 660 IDC Revenue
 Project Number: 1056459 Project Name: 660 Indirect Cost Award
 Budget Type: Approved Cost Budget

Draft Budget

Version Name: Original Budget Status: Working
 Change Reason: New Original
 Description:

Entry Options

Entry Method: Task-Resource-Period Resource List: Expenditure Categories and Typ

Totals

	Labor		Burdened		Revised Date
	UOM	Quantity	Raw Cost	Cost	
Draft					16-MAY-2019 09:33:03
Current	Hours	0.00	0.00	1.00	24-JUN-2010 13:20:58