

E-GRANTS USER GUIDE

CREATING AMENDMENTS TO APPROVED APPLICATIONS

Updated March 2017

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When districts need to make modifications to a "Final Approved" application in E-Grants, an amendment must be created. Some common changes that require an amendment to an E-Grants application are:

- Budgeting carryover funds added to the district's budget;
- Transferring the allocation of funds between eligible programs;
- Re-budgeting object of expenditure or purpose category codes on the budget detail page of an approved application;
- Budgeting reallocated funds added to the district's budget; and
- Program objective or activity changes.

Important Information about Carryover: When a prior year final expenditure report for a carryover-eligible program has been approved, E-Grants automatically brings eligible unexpended funds forward to the districts' current year budget as carryover and generates an automatic e-mail to the district AR and persons who have been entered on the respective application's **Contact Information** page. This is the district's notice that there may be carryover funds to include in the current-year budget. If the prior year final expenditure report is approved *after* the creation of the current year application, an E-Grants amendment to the current year budget is necessary.



Note for ESEA and IDEA Consolidated Applications: All carryover funds stay with the prime applicant/administrative agent. The prime applicant/administrative agent is responsible for submitting amendments; member districts do not take any action.

1. *Log into* the E-Grants System using your Username (e-mail address) and Password.
 - New Users: *click* **New User** on the E-Grants logon page to request an E-Grants account.
 - Existing Users: if you don't remember your password, *click* **Forgot Password** to receive a temporary password via email.
2. *Click* **EGrants Access/Select** from the E-Grants **Menu List**.
3. If more than one LEA is listed, *select* the appropriate LEA.
4. *Select* the appropriate fiscal year from the **Select Fiscal Year** drop-down.
5. *Select* the most current Original Application or Amendment in the **Revision** drop-down.

6. Click the **AMEND** button beside the correct grant to create a new amendment.
7. Select **Page Lock Control** (blue tab on the right side).
8. Click the "Expand All" check box (left side).
9. Click the check box to the right of the page(s) needing modification.
 - o "Open Page for Editing" unlocks the Web pages that need modification (i.e., Contact Information, Program Detail page and Objectives, Budget Pages, etc.).
 - o *Save the page.*



ESEA Applicants: You must contact your program specialist or grant accountant to unlock the **Program Selection** page to accept or refuse your carryover funds.

10. **ABLE, ESEA, and IDEA only:** Use the drop-down menu titled "Program Specific Pages" in the upper-right corner of the page to select the appropriate program for modification.
11. Click on the tab to be modified (Budget Detail, Program Detail, etc.).
 - o Make the necessary changes.
 - o *Save the page!!*



ESEA and IDEA applicants: If the modification increases or decreases an allocation for a program, the district will need to *re-save* the Private/Nonpublic Schools Proportionate Share page under the selected program's Budget Pages tab.



Carl Perkins Applicants: Update the amounts in the Funding Distribution page before making changes to the Budget Page.

Funding/Allocations Tab (Page)

The carryover amount will be in the "Carryover" row under "Prior Year Funds."

ESEA only: REAP-flex (100% transferability) districts may transfer up to 100% of the carryover funds into receiving programs.

ESEA only: Districts with Schoolwide programs that transferred funds to the Schoolwide budget in the original application:

- o Go to Title IA Basic, **Targeting Step 4** page and redistribute the allocation.
- o Click each red button on the **Targeting Step 4** page in the order in which they appear to accurately redistribute funds.
- o Return to the **Funding/Allocations** page.
- o Enter the amount to transfer in the "To School Wide" row.

Budget Detail Tab (Page)

The "Allocation Remaining" figure at the bottom of the **Budget Detail** page will display the carryover or reallocated funds to be budgeted for that program.

- *Distribute* funds under the appropriate object codes and purpose categories.
 - Districts have the option to budget up to the "Maximum Indirect Cost" (Line E). If desired, *enter* the Indirect Cost amount in Line G.
12. **ABLE, ESEA, and IDEA only** *Return* to the **top level** of the application from the drop-down list in the upper-right corner.
 13. *Click* the **Amendment Description** tab.
 - If the page is locked, unlock it on the **Page Lock Control** page.
 14. *Click* the check box of the application section(s) where the district made changes on the amendment.
 - Single programs such as Gifted and Talented, Migrant, and Carl Perkins do not have check boxes.
 - *Enter* a short description of the changes in the text box.
 - *Save the page!!*
 15. *Click* the **Submit** tab.
 - The **Submit** tab is on the consolidated level of the ABLE, ESEA and IDEA applications.
 - *Run* the consistency check.
 - *Correct* any errors that display.
 - If the consistency check identifies changes on pages that have not been unlocked, go to the **Page Lock Control** page and unlock them.

When all edits have passed the consistency check, a message to the Authorized Representative stating, "Click Submit to OPI button to make final submission of the application for OPI review and approval," will appear.

16. (AR only) *Click* the **SUBMIT TO THE OPI** button to *submit* the application.



Note: If district staff with the LEA data entry role are running the consistency check, the button text is, "Submit to Authorized Rep." The application is not submitted to the OPI at this point. The AR must make final submission to the OPI.

Once the amendment has been submitted, the **E-Grants Access Select** page status will be "Submitted to OPI."