

Grants Basic Training

Adjusting Grant Budgets & Customer Contracts



Adjusting Grant Budgets & Customer Contracts Training Objectives

- **Understanding the two different processes**
 - **Adjusting a Project Budget**
 - **Making an adjustment to Customer (revenue) Contract with Amendment**
- **Understanding the various controls on both**
- **Steps to adjust a Project Budget**
- **Steps to create and Process a Customer (revenue) Contract Amendment**

What needs to be Accomplished?

➤ Grant Modifications

- 1) **Adjust Project Budgets**
- 2) **Make adjustment to Customer (revenue) Contract with Amendment**

?? Do you want expenditures to process ??

?? Do you want billing and revenue to process ??

?? Do you want all of the above to process ??

Project Budget Adjustments

- Decisions ????

- Project Budgets Adjustments
 - Was the amount initially entered correct?
 - Is a budget item needed on the budget?
 - Was the grant funded in increments?
 - Was the grant amount reduced?
 - Did payroll process and an encumbrance (PO) still remain?

Project Budget Adjustments

Grant Project Budgets and Commitment Control

- The Grant Project Budget controls your spending limit
- The Grant Project Budget contains five digit budget items
- These budget items allow for a range of encumbrances, pre-encumbrances, and expenditures to occur
- The Grant Project Budget contains a five digit fund
- The fund allows for encumbrances, pre-encumbrances, and expenditures to occur on the specific fund
- The Grant Project Budget contains five digit department IDs
- The department field has no controls, but is a required field
- Payroll and Fringe can exceed the Grant Project Budget, however budget item(s) – 70100 and 70200 must exist on the specific fund

Adjustments to Project Budgets

1st - Research in Commitment Control

Navigation: FSCM> Commitment Control> Review Budget Activities> Budgets Overview - Ledger Group is “PRJ_OVR_PR”
Overall Project Budget

Budget Inquiry Criteria
Budget Overview

Inquiry BUDMLG Description

Amount Criteria

Budget Type

*Business Unit Ledger Group/Set Ledger Group

View Stat Code Budgets Display Chart Project Level Budget

Time Span

*Type of Calendar

Budget Criteria Personalize | Find | View All | | First 1 of 1 Last

Select	Ledger Group	Calendar ID	From Budget Period	To Budget Period	Include Adjustment Period(s)	Include Closing Adjustments
<input checked="" type="checkbox"/>	PRJ_OVR_PR	AL	<input type="text" value="ALL"/> <input type="text"/>	<input type="text" value="ALL"/> <input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ChartField Criteria

ChartField	ChartField From Value	ChartField To	Info	ChartField Value Set	Update/Add
Fund	<input type="text" value="%"/> <input type="text"/>	<input type="text" value="%"/> <input type="text"/>		<input type="text"/> <input type="text"/>	<input type="button" value="Update/Add"/>
Bonds	<input type="text" value="%"/> <input type="text"/>	<input type="text" value="%"/> <input type="text"/>		<input type="text"/> <input type="text"/>	<input type="button" value="Update/Add"/>
Project	<input type="text" value="MIMEMRP100F20"/> <input type="text"/>	<input type="text" value="%"/> <input type="text"/>		<input type="text"/> <input type="text"/>	<input type="button" value="Update/Add"/>
Activity	<input type="text" value="%"/> <input type="text"/>	<input type="text" value="%"/> <input type="text"/>		<input type="text"/> <input type="text"/>	<input type="button" value="Update/Add"/>

Budget Status

- Open
- Closed
- Hold

Adjustments to Project Budgets

If the expenditure trying to process is greater than the available budget and it is allowable to the grant. Available budget on this project ID's budget is \$24,831.53 – if expenditure trying to be processed is \$25,000.00 – an increase of \$168.47 would be needed.

Business Unit: 34101
 Ledger Group: PRJ_OVR_PR Project Level Budget
 Type of Calendar: Detail Budget Period
 Amounts in Base Currency: USD
 Revenue Associated:

[Return to Criteria](#)

Max Rows:

100

[Display Options](#)

Ledger Totals (1 Rows)

		Net Transfers:
Budget:	131,564.00	0.00
Expense:	106,732.47	
Encumbrance:	0.00	
Pre-Encumbrance:	0.00	
Budget Balance:	24,831.53	
Associate Revenue:	0.00	
Available Budget:	24,831.53	

Budget Overview Results

[Personalize](#) | [Find](#) | [View All](#) | | | [First](#) | [1 of 1](#) | [Last](#)

		Ledger Group	Fund	Project	Activity	Bonds	Budget	Expense	Encumbrance
1		PRJ_OVR_PR	11000	MIMEMRP100F2016			131,564.000	106,732.470	0.000

Adjustments to Project Budgets

Increase the project budget. Navigation > FSCM > Grants > Awards > Project Budgets & enter BU & project ID & search.

Project Budgets

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: [=] 34101

Project: [begins with] MIMEMRP100F2016

Budget Plan ID: [=]

Budget Period: [begins with]

Budget Type: [=]

Description: [begins with]

Case Sensitive

Limit the number of results to (up to 300): 300

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

Adjustments to Project Budgets

Click on the Blue Budget Amounts Line to View All.
Go to any line in the budget and select the blue plus sign adding a new line to the budget.

Budget Detail

Project MIMEMRP100F2016 Air MEM RP 100F 2016

Budget Period 1

Begin Date 10/01/2015

End Date 09/30/2023

[Finalize](#)

[Process Monitor](#)

Project Budget Summary

Cost Share Direct \$0.00

Currency USD

Total Budget \$129,264.00

Sponsor Budget \$129,264.00

Security Status None

Budget Amounts for Period

[Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Refresh](#) | First 1-12 of 12 Last

[General](#) | [Project Detail](#) | [Commitment Control Detail](#) | [Grants Detail](#) | [Help](#)

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Amount
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD	1.00
						BUD	0.00
FRINGE	11000	34103	70200	19000	FEDERAL	BUD	1.00
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	1.00
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	25,489.00
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	10,624.00
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	93,143.00
PROF_SRVC_3RD_P	11000	34103	70800	19000	FEDERAL	BUD	1.00
PROF_SRVC_STATE	11000	34103	72500	19000	FEDERAL	BUD	1.00
TRAINING	11000	34103	72100	19000	FEDERAL	BUD	1.00
TRAVEL	11000	34103	70300	19000	FEDERAL	BUD	1.00
UTILITIES	11000	34103	70500	19000	FEDERAL	BUD	1.00

Adjustments to Project Budgets

Select the Budget Item needed.

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Amount
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD	1.00
LABOR_SALARY	11000	34103	70100	19000		BUD	0.00

Enter the Amount of the Increase and Activity needed.

LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	10,000.00
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Adjustments to Project Budgets

If grant was 75 -25 – two lines would be needed.

- One for Federal with additional Federal dollars
- One for State with additional State dollars.
- Federal line would be BUD
- State line would be CBU

Adjustments to Project Budgets

Click on the Commitment Control detail tab and change Budget Entry Type from “Work Program Original Entry” to “Revenue Expansion (Fed/Othr)” & save.

General Project Detail Commitment Control Detail Grants Detail								
Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type		Budget Entry Type
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD		Work Program Original En
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD		Work Program Original E

Budget Amounts for Period Personalize Find View All First 1-12 of 12 Last								
General Project Detail Commitment Control Detail Grants Detail								
Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type		Budget Entry Type
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD		Work Program Original En
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD		Revenue Expansion (Fe

Adjustments to Project Budgets

Scroll over and change Parent Budget Entry Type from “Work Program Original Entry” to “Revenue Expansion (Fed/Othr)” and save

Budget Amounts for Period Personalize | Find | View All | First 1-12 of 12 Last

General | Project Detail | Commitment Control Detail | Grants Detail |

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Parent Budget Entry Type
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD	Work Program Original Entry
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	Work Program Original E

Budget Amounts for Period Personalize | Find | View All | First 1-12 of 12 Last

General | Project Detail | Commitment Control Detail | Grants Detail |

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	Parent Budget Entry Type
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD	Work Program Original Entry
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	Revenue Expansion (Fe

Adjustments to Project Budgets

Scroll over and change Budget Line Code from “Original” to “Adjustment” and save.

Budget Amounts for Period Personalize | Find | View All | [Print] [Calendar] First 1-12 of 12

General | Project Detail | **Commitment Control Detail** | Grants Detail

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	s	Budget Line Code
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD	ns	Original
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	ns	Original

Budget Amounts for Period Personalize | Find | View All | [Print] [Calendar] First 1-12 of 12

General | Project Detail | **Commitment Control Detail** | Grants Detail

Budget Item	Fund	Department	Account	Location CF	Activity	Analysis Type	s	Budget Line Code
F&A_COSTS	11000	34103	89040	19000	FEDERAL	BUD	ns	Original
LABOR_SALARY	11000	34103	70100	19000	FEDERAL	BUD	ns	Adjustment

Adjustments to Project Budgets

If line was Indirect Cost – click on the Grants Detail tab and choose the Facilities and Admin box to have a check in it.

If you had a line that was STATE activity; make it “Cost Shared” – choose the Cost Sharing box to have a check in it.

Budget Period: 1 Begin Date: 10/01/2008 End Date: 12/31/2010 **Finalize** [Process Monitor](#)

Project Budget Summary

Cost Share Direct \$0.00 Total \$1,003,843.00 Currency: USD Total Budget: \$1,003,843.00

Budget Amounts for Period [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-9 of 9 | [Last](#)

[General](#) | [Project Detail](#) | [General Ledger Detail](#) | [Commitment Control Detail](#) | [Grants Detail](#)

Fund	Department	Account	Location CF - Class	Program - User Code - Product	CF 1	Facilities and Administration	Cost Sharing		
11000	32739	71200	19000			<input type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32739	89040	19000			<input checked="" type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32739	70200	19000			<input type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32739	70100	19000			<input type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32739	70800	19000			<input type="checkbox"/>	<input checked="" type="checkbox"/>	+	-
1	3270	70800	1901			<input type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32739	70900	19000			<input type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32739	70300	19000			<input type="checkbox"/>	<input type="checkbox"/>	+	-
11000	32701	71400	19010			<input type="checkbox"/>	<input type="checkbox"/>	+	-

[Save](#) [Return to Search](#) [Notify](#)

Adjustments to Project Budgets

Click on the Project Detail tab and change the Accounting Date to the Begin Date on the Project ID and save.

Budget Detail

Project HSTANFADMIN0016 TANF ADMIN 2016 HS

Budget Period 1 Begin Date 10/01/2015 End Date 12/31/2016 [Finalize](#) [Process Monitor](#)

Project Budget Summary

Cost Share Direct \$12,000,014.00 Currency USD Total Budget \$27,781,966.00
 Sponsor Budget \$15,781,952.00 Security Status None

Budget Amounts for Period [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Calendar](#) First 1-12 of 34 Last

[General](#) | [Project Detail](#) | [Commitment Control Detail](#) | [Grants Detail](#) | [More](#)

Budget Item	Account	Fund▲	Department▲	Activity▲	Analysis Type	Projects Distribution Status	Accounting Date		
LABOR_SALARY	70100	11000	34501	FEDERAL	BUD	Not Distributed	10/01/2015		+ -
LABOR_SALARY	70100	11000	34501	FEDERAL	BUD	Distributed	09/24/2015		+

Adjustments to Project Budgets

Save

Ready to finalize the Project Budget.

Budget Detail

Project MIMEMRP100F2016 Air MEM RP 100F 2016

Budget Period 1

Begin Date 10/01/2015

End Date 09/30/2023

Finalize

[Process Monitor](#)

Click on the Finalize button and this message will appear.

Click OK.

Message

Budget Finalization has been processed. (13100,707)

Click on the [Process Monitor](#) hyperlink to view run status.

OK

Adjustments to Project Budgets

Click on the Process Monitor hyperlink

Process List | Server List

View Process Request For

User ID: Type: Last: Days:

Server: Name: Instance: to:

Run Status: Distribution Status: Save On Refresh

Process List									
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	23962273		Application Engine	PC_WRAPPER	maryl0117001	04/19/2016 9:41:10AM CDT	Success	Posted	Details

Click the yellow refresh button until the Run Status is “Success” and the Distribution Status is “Posted.”

Click on the Details hyperlink.

Adjustments to Project Budgets

Click on the Message Log hyperlink & view all & scroll down. Look for the number of Rows “Edited with No Errors” and “Loaded.”

Process Detail

Process

Instance 23962273	Type Application Engine
Name PC_WRAPPER	Description PC_INTFEDIT On-Line Wrapper
Run Status Success	Distribution Status Posted

Run

Run Control ID PC_INTFEDIT12319551
Location Server
Server PSUNX
Recurrence

[Update Process](#)

Date/Time	Actions
Request Created On 04/19/2016 9:41:10AM CDT	Parameters Transfer
Run Anytime After 04/19/2016 9:41:10AM CDT	Message Log View Locks
Began Process At 04/19/2016 9:41:21AM CDT	Batch Timings
Ended Process At 04/19/2016 9:42:52AM CDT	View Log/Trace

10	9:42:40AM	1 Row(s) were Edited with No Errors	Explain
10	9:42:40AM	1 Row(s) were Loaded	Explain

Adjustments to Project Budgets

- One can't reduce the Grant Project Budget by more than the available budget.

Navigation: FSCM> Commitment Control> Review Budget

Activities – Enter BU and PRJ_OVR_PR for overall Ledger Group and enter Project ID and click on search.

Business Unit 34101
Ledger Group PRJ_OVR_PR
Type of Calendar Detail Budget Period
Amounts in Base Currency USD
Revenue Associated:

[Return to Criteria](#) Max Rows [Display Options](#)

Ledger Totals (1 Rows)

Budget	150,000.00
Expense	106,732.47
Encumbrance	0.00
Pre-Encumbrance	0.00
Budget Balance	43,267.53
Associate Revenue	0.00
Available Budget	43,267.53

Adjustments to Project Budgets

- If you tried, the Grant Project Budget would hang up on a temporary table.
- TN_PR135_PROJ_BUDGETS_IN_ERROR query is one that you could run to identify this, or if you looked back on the Grant Project Budget, click on the Commitment Control Status and in Exceptions you would have a blue dot with an “i” in it. The Message Log would reflect that the budget had errors; so you need to recheck Commitment Control to see what the available budget amount to reduce was compared to what you tried to reduce.

Budget Item	Exceptions	Commitment Control Status	Budget Entry Type	Generate Parent Budget(s)	Parent Budget Entry Type	Budget Line Code
AWARD_INDEMN		Distributed	Work Program Original Entry	<input checked="" type="checkbox"/>	Work Program Original Entry	Original

Budgets vs Amendments

These are two separate and independent actions.

- Modifying the budget does not affect the Customer (revenue) Contracts billing limit; a Contract Amendment has to be done along with adjusting the Grant Project Budget.
- Adjusting the Grant Project Budget does not affect the Customer (revenue) Contract except that it sends the billable amount to the Award Profile section of FSCM Edison.

Customer (revenue) Contract Amendments

Notes: Grant Project Budgets and Customer (revenue) Contract Amendments

- If the Project budget is increased but the billing limit of the Customer (revenue) Contract is not amended:
 - Transactions *will* process in:
 - Accounts Payable
 - Travel
 - Payroll
 - General Ledger
 - Transactions *will not* recognize revenue
 - Transactions *will not* bill
 - Transactions *will not* produce a draw

Customer (revenue) Contract Amendments

Customer (revenue) Contract Amendments

- Customer Contract billing limit can not be more than amount state has been granted!
- Must be allowable by grantor.
- May be needed if Federal amount reduced.
- May be needed if agency/business unit/project ID or Customer (revenue) Contract has had Refund of Prior Year Federal Expenditures (68012000) or Program Income (680800005) received.

Customer (revenue) Contract Amendments

Customer (revenue) Contract Amendments

- May be needed if agency/business unit or Customer (revenue) Contract was only entered for a portion of the granted dollars (awarded in incremental amounts - not in one lump sum).
- May be needed if transactions exist in “OLT” over the Customer (revenue) Contract’s billing limit.

Processing an Amendment

Navigation: FSCM> Customer Contracts> Create and Amend>
General Information

Enter: BU

Enter: Customer (revenue) Contract

Search

Or

Navigation: FSCM> Grants> Awards> Award Profile

Enter: BU

Enter: Either Grant Award # or Project ID

Search and then hop to the Customer Contract via hyperlink

Processing an Amendment

From the General Page

Click on the Lines Tab

Click on the Detail Tab on the Contract Lines page

The screenshot shows a web application interface for contract management. At the top, there are three tabs: 'General', 'Lines', and 'Amendments'. The 'Lines' tab is highlighted with a red box. Below the tabs, there is a header area with the following information:


- Contract Number: MIMEMRP100F2016
- Sold To Customer: DEPARTMENT OF DEFENSE ME
- Amendment Number: 000000002
- Contract Status: ACTIVE

Below the header is a button labeled 'Amend Contract'. Underneath is a section titled 'Contract Lines' with a help icon. This section has four sub-tabs: 'General', 'Detail', 'Billing Amount Details', and 'Revenue Amount Details'. The 'Detail' sub-tab is highlighted with a red box. Below the sub-tabs is a table with the following columns: Actions, Line, Product, Description, Price Type, Bundle, Start Date, End Date, Status, and Supplemental Data.

Actions	Line	Product	Description	Price Type	Bundle	Start Date	End Date	Status	Supplemental Data
▼ Actions	1	AS_INCURRED	As Incurred	Rate		10/01/2015	09/30/2023	Active	Supplemental Data

Processing an Amendment

Click on the Contract Terms hyperlink to get to the “Related Projects” page


Contract Lines ?							
General Detail Billing Amount Details Revenue Amount Details 							
Actions	Line	Product	Description	Price Type	Billing Plan	Revenue Plan	Contract Terms
▼ Actions		1 AS_INCURRED	As Incurred	Rate	In Progress	In Progress	Contract Terms

Processing an Amendment

On the “Related Projects” page there is a Billing Limit and a Revenue Limit – these should be the same.


Click on the Amend Contract button

Related Projects | Contract Amendments

Contract Number MIMEMRP100F2016  Sold To Customer DEPARTMENT OF DEFENSE ME
 Amendment Number 0000000007 Contract Status ACTIVE

Contract Line ◀ 1 ▶ Price Type Rate
 Product AS_INCURRED
 Description As Incurred

Amend Contract

PC Business Unit  Transaction Limits Review Limits
 Billing Limit 131,564.00
 Revenue Limit 131,564.00 Retainage ID

Processing an Amendment

This opens up the Contract Amendments page.
Click the Amendment Type and select the value needed.

Related Projects | **Contract Amendments**

Contract Number MIMEMRP100F2016 Sold To Customer DEPARTMENT OF DEFENSE ME
Pending Amendment 0000000008 Contract Status ACTIVE

View Current

Amendments Personalize | Find | View All | First 1-9 of 9 Last

General | Statistics | Billing Amended Amounts | Revenue Amended Amounts | Misc.

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000007	Additional	Additional New Money	05/12/2016	Complete	Detail	Notes
0000000006	Additional	Additional New Money	03/24/2016	Complete	Detail	Notes
0000000005	Additional	Additional New Money	03/22/2016	Complete	Detail	Notes
0000000004	Additional	Additional New Money	03/22/2016	Complete	Detail	Notes
0000000003	Additional	Additional New Money	03/21/2016	Complete	Detail	Notes
0000000002	Additional	Additional New Money	12/28/2015	Complete	Detail	Notes
0000000001	Additional	Additional New Money	11/04/2015	Complete	Detail	Notes
0000000000	Contract Activation		08/28/2015	Complete	Detail	Notes
0000000008	<input type="text" value=""/>	<input type="text" value=""/>	12/07/2017	Pending	Detail	Notes

Processing an Amendment

In this example we are selecting “Additional” and the Reason “Additional New Money” -

Related Projects | **Contract Amendments**

Contract Number MIMEMRP100F2016 Sold To Customer DEPARTMENT OF DEFENSE ME
 Pending Amendment 0000000008 Contract Status ACTIVE

View Current

Amendments Personalize | Find | View All | First 1-9 of 9

Amendment	Amendment Type	Reason	Process Date	Amendment Status	Detail	Notes
0000000007	Additional	Additional New Money	05/12/2016	Complete	Detail	Notes
0000000006	Additional	Additional New Money	03/24/2016	Complete	Detail	Notes
0000000005	Additional	Additional New Money	03/22/2016	Complete	Detail	Notes
0000000004	Additional	Additional New Money	03/22/2016	Complete	Detail	Notes
0000000003	Additional	Additional New Money	03/21/2016	Complete	Detail	Notes
0000000002	Additional	Additional New Money	12/28/2015	Complete	Detail	Notes
0000000001	Additional	Additional New Money	11/04/2015	Complete	Detail	Notes
0000000000	Contract Activation		08/28/2015	Complete	Detail	Notes
0000000008	Additional	Additional New Money	12/07/2017	Pending	Detail	Notes

Click on Save and then click on the Detail hyperlink.

Processing an Amendment

Click on the Amendment Amount Allocation hyperlink.

Amendment Details

Contract MIMEMRP100F2016

Amendment Number 0000000008

Sold To Customer GR0000000000189

Amendment Type **Additional**

*Process Date 12/07/2017

Amendment Reason Additional New Money

*Amendment Status Pending

Total Billing Adjustment 0.00

Total Revenue Adjustment 0.00

Fixed Billing Adjustment 0.00

Fixed Revenue Adjustment 0.00

Fixed Billing Allocation Incomplete

Fixed Revenue Allocation Incomplete

Additional Amendment Details

Reference ID

User Ref #1

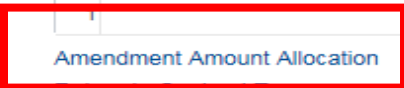
User Ref #2

Amendment Components

Personalize | Find | View All

General | Statistics

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
Amendment Amount Allocation		Internal Notes			



Processing an Amendment

Bringing you to the Amendment Billing Allocation Page which says the Allocation is Incomplete and the New Billing Limit box is now open to enter a new value.

Amendment Billing Allocation

Contract MIMEMRP100F2016
 Business Unit 34101
 Sold To GR0000000000189 DEPARTMENT OF DEFENSE ME
 Currency USD

Amendment 0000000008
 Amendment Type Additional
 Amendment Reason Additional New Money

Contract Billing

Total Billing Adjustment × Unallocated Billing 0.00
 Total Billing After Adjustment 129,764.00

Fixed Billing

Fixed Billing Adjustment Unallocated Fixed Billing 0.00
 Discount / Surcharge 0.00 Inclusive Prepaids Adjustment 0.00
 Net Adjustment 0.00 Allocation

[Recalculate](#)

Contract Line Pricing

Personalize | Find | | | First 1 of 1 Last

Retrieve Billing Price	Line Number	Product	Current Billing Limit	New Billing Limit	Adjustment Billing Limit	Limit Check
<input type="checkbox"/>	1	AS_INCURRED	131,564.00	<input type="text" value="131,564.00"/>		Limit Check

Select All Clear All [Recalculate](#)

Adjustment Line Totals

Billing Amount	0.00	Recurring Billing	0.00
Discounts/Surcharges	0.00	Billing Limit	0.00
		Total Billing	0.00

Processing an Amendment

Enter the New Billing Limit in the Contract Line Pricing section only and click on “Recalculate” which will change the Allocation from “Incomplete” to “Complete” and Save.

Amendment Billing Allocation

Contract MIMEMRP100F2016 Amendment 0000000008
 Business Unit 34101 Amendment Type Additional
 Sold To GR000000000189 DEPARTMENT OF DEFENSE ME Amendment Reason Additional New Money
 Currency USD

Contract Billing

Total Billing Adjustment	0.00	Unallocated Billing	-18,436.00
Total Billing After Adjustment	129,764.00		

Fixed Billing

Fixed Billing Adjustment	0.00	Unallocated Fixed Billing	0.00
Discount / Surcharge	0.00	Inclusive Prepaid Adjustment	0.00
Net Adjustment	0.00	Allocation	Complete

Recalculate

Contract Line Pricing

Personalize | Find | First 1 of 1 Last

Retrieve Billing Price	Line Number	Product	Current Billing Limit	New Billing Limit	Adjustment Billing Limit	Limit Check
<input type="checkbox"/>	1	AS_INCURRED	131,564.00	150,000.00	18,436.00	Limit Check

Select All Clear All **Recalculate**

Adjustment Line Totals

Billing Amount	0.00	Recurring Billing	0.00
Discounts/Surcharges	0.00	Billing Limit	18,436.00
		Total Billing	18,436.00

Prepays
[Return to Amendment Details](#)

Processing an Amendment

Click on Return to Amendment Details

Amendment Billing Allocation

Contract MIMEMRP100F2016
 Business Unit 34101
 Sold To GR0000000000189 DEPARTMENT OF DEFENSE ME
 Currency USD

Amendment 0000000008
 Amendment Type Additional
 Amendment Reason Additional New Money

Contract Billing

Total Billing Adjustment	0.00	Unallocated Billing	-18,436.00
Total Billing After Adjustment	129,764.00		

Fixed Billing

Fixed Billing Adjustment	0.00	Unallocated Fixed Billing	0.00
Discount / Surcharge	0.00	Inclusive Prepays Adjustment	0.00
Net Adjustment	0.00	Allocation	Complete

Contract Line Pricing

Personalize | Find | First 1 of 1 Last

Retrieve Billing Price	Line Number	Product	Current Billing Limit	New Billing Limit	Adjustment Billing Limit	Limit Check
<input type="checkbox"/>	1	AS_INCURRED	131,564.00	150,000.00	18,436.00	Limit Check

Select All Clear All [Recalculate](#)

Adjustment Line Totals

Billing Amount	0.00	Recurring Billing	0.00	
Discounts/Surcharges	0.00	Billing Limit	18,436.00	Total Billing 18,436.00

Prepays
[Return to Amendment Details](#)

Processing an Amendment

This brings you back to the Amendment Details page.
 Change the Amendment Status from “Pending” to “Ready”

Amendment Details

Contract MIMEMRP100F2016 Amendment Number 0000000008
 Sold To Customer GR0000000000189

Amendment Type: *Process Date:
 Amendment Reason: *Amendment Status:

Total Billing Adjustment Total Revenue Adjustment 0.00
 Fixed Billing Adjustment Fixed Revenue Adjustment 0.00
 Fixed Billing Allocation Complete Fixed Revenue Allocation Complete

▶ **Additional Amendment Details**

Reference ID User Ref #1
 User Ref #2

Amendment Components Personalize | Find | View All | First 1-2 of 2 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Amount Allocation	Line 1	Billing Limit	Update	131564	150000
2 Amount Allocation	Line 1	Revenue Limit	Update	131564	150000

Amendment Amount Allocation
 Return to Contract Terms

Internal Notes

Processing an Amendment

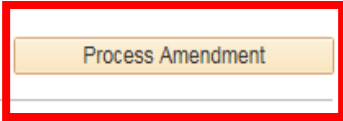
The “Process Amendment” button will appear.

Amendment Details

Contract MIMEMRP100F2016 Amendment Number 0000000008

Sold To Customer GR0000000000189

Amendment Type Additional Process Date 12/07/2017

Amendment Reason Additional New Money *Amendment Status **Ready** 

Total Billing Adjustment 0.00 Total Revenue Adjustment 0.00



Fixed Billing Adjustment 0.00 Fixed Revenue Adjustment 0.00


Fixed Billing Allocation Complete Fixed Revenue Allocation Complete

▶ **Additional Amendment Details**

Reference ID User Ref #1

User Ref #2

Amendment Components Personalize | Find | View All |   First 1-2 of 2 Last

General **Statistics** 

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Amount Allocation	Line 1	Billing Limit	Update	131564	150000
2 Amount Allocation	Line 1	Revenue Limit	Update	131564	150000

Processing an Amendment

When the Amendment is complete the Amendment Page will show the Amendment Status as “Complete.”

Amendment Details

Contract	MIMEMRP100F2016	Amendment Number	0000000008
Sold To Customer	GR0000000000189	Amendment Completed On	12/07/2017 12:01PM
Amendment Type	Additional	Process Date	12/07/2017
Amendment Reason	Additional New Money	Amendment Status	Complete
Total Billing Adjustment	0.00	Total Revenue Adjustment	0.00
Fixed Billing Adjustment	0.00	Fixed Revenue Adjustment	0.00
Fixed Billing Allocation	Complete	Fixed Revenue Allocation	Complete

▶ Additional Amendment Details

Reference ID	User Ref #1
	User Ref #2


Amendment Components Personalize | Find | View All | First 1-2 of 2 Last

Component	Amend Ref #1	Label Fieldname	Edit Type	Old Value	New Value
1 Amount Allocation	Line 1	Billing Limit	Update	131564	150000
2 Amount Allocation	Line 1	Revenue Limit	Update	131564	150000

Processing an Amendment


Click on the Return to Contract Terms hyperlink and the new Billing and Revenue Limits appear and your Amendment has been successfully accomplished.

[Related Projects](#) | [Contract Amendments](#)

Contract Number MIMEMRP100F2016 
Sold To Customer DEPARTMENT OF DEFENSE ME
Amendment Number 0000000008 **Contract Status** ACTIVE

Contract Line ◀ 1 ▶ **Price Type** Rate
Product AS_INCURRED
Description As Incurred

[Amend Contract](#)

PC Business Unit	34101		Transaction Limits	Review Limits
Billing Limit	150,000.00			
Revenue Limit	150,000.00			
Discount ID			<input type="checkbox"/> Tiered Pricing	Tiered Pricing

Retainage ID

Processing an Amendment

Double check that the amount on the Award Profile is also equal to the Amount on the Customer Contract.

Navigation: FSCM > Grants > Awards > Award Profile

Enter BU: Award Profile and search; click on Funding Tab

[Award](#) | [Funding](#) | [Resources](#) | [Certifications](#) | [Terms](#) | [Milestones](#) | [Key Words](#) | [Funding Inquiry](#) | [Attachments](#) | [FileNet Interface](#)

Award ID MIMEMRP100F2016 Award Title Air MEM RP 100F 2016
 Reference Award Number Currency USD
 Award PI Collins,Barry L Primary Project PI Collins,Barry L

Total Award Amount 150,000.00

Funding Info Find | View All First 1 of 1 Last

Project MIMEMRP100F2016 Air MEM RP 100F 2016 Project PI Collins,Barry L

Detail Personalize | Find | First 1 of 1 Last

Period	*Start Date	*End Date	Funded Amount	To Project ID	Budget Posting Status	PC Distribution Status
1	10/01/2015	09/30/2023	150,000.00	MIMEMRP100F2016	Multiple Statuses Exist	Not Distributed

Processing an Amendment

If the agency/business unit had OLT transactions on the Customer (revenue) Contract – a ticket would need to be filed with the Edison Help Desk for the FSCM/Grants/Projects team to run “Pricing” on those OLT transactions.

Information to give to the Help Desk:

- Business Unit
- Customer (revenue) Contract
- Accounting Dates of OLT transactions

Processing an Amendment

Questions ????