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Grants Management

Amendments for Grant Recipients

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Amendments Overview

Amendments allow grant recipients and funding organizations to negotiate changes to an award. Recipients can propose amendments to the award amount, duration, budget categories, or program goals. Funders can review the proposed amendments and approve, deny, or request more information within Euna Grants. Euna Grants facilitates and tracks these interactions.

In addition, organizations can record amendments in Euna Grants if their corresponding recipient or funding organization is not in Euna Grants.

Icons

-  Print
-  Help
-  Save Current View
-  Send Email
-  Edit
-  Add
-  Remove
-  Delete
-  Calendar
-  Activate
-  Deactivate

Warning

Once you submit your amendment you will not be able edit it.

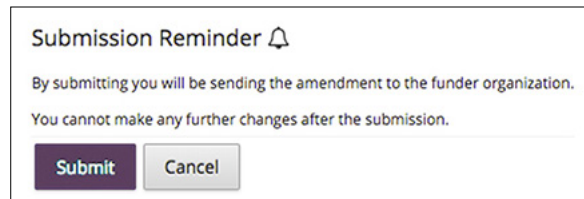
Adding an Amendment

Amendments can have as many as four parts: [Awarded Amount](#), [Award Duration](#), [Category Budget](#), and [Performance Goal](#). Depending on your funder's settings, you may not see all available types.

1. Open **Grants Management>Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Amendments**.
4. Click the **+** (**Add icon**) in the *Icon Bar*.
5. To add an amendment type, click the (**Activate icon**) on the grayed-out tab.



6. Enter the information for the selected amendment type.
7. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.



The funding organization may change the status to *Approved*, *Denied* or *Needs More Information*. They also have the option to edit the amendment before approving. You will receive an email notification when the funding organization has changed the status of the amendment.

Related:

[What to do if a funding organization changes an amendment status to Needs More Information?](#)

Note

Depending on your account settings, this record type may have additional custom fields or sections.

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

How To Add an **Awarded Amount** Amendment Type

1. Click **Awarded Amount**. If the amendment type is not active, click the (**Activate icon**) to activate.



2. Add the proposed **Amendment Name**.
3. In the *Date Requested* field, select the **date you will submit the**

amendment. If the *Date Requested* field is left empty, the date the amendment is submitted through Euna Grants (i.e., the date the *Submit* button is clicked) will be recorded.

4. Add the **Proposed Total Awarded Amount**. The *Current Total Awarded Amount* is listed above this field for reference.
5. Add the **Justification** for your proposed amendment.
6. To *Attach Documentation*, click **Choose File** and select a file from your computer.
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

! Note

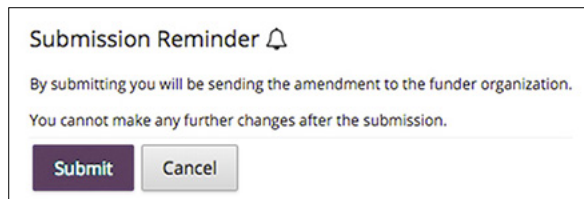
Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

! Warning

Once you submit your amendment you will not be able edit it.

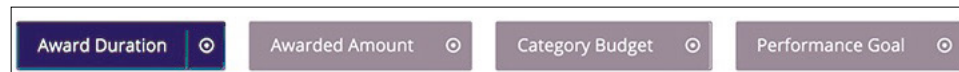
! Note

Depending on your account settings, this record type may have additional custom fields or sections.



How to Add an Award Duration Amendment Type

1. Click **Award Duration**. If the amendment type is not active, click the **(Activate icon)** to activate.



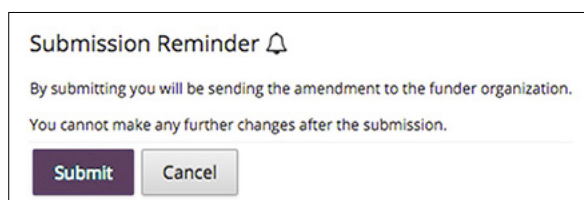
2. Add the proposed **Amendment Name**.
3. In the *Date Requested* field, select the **date you will submit the amendment**. If the *Date Requested* field is left empty, the date the amendment is submitted through Euna Grants (i.e., the date the *Submit* button is clicked) will be recorded.
4. Select the **Proposed End Date**. The *Current End Date*, *Current Close Out Date*, and *Proposed Close Out Date* are listed for reference.
5. Add the **Justification** for your proposed amendment.
6. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

! Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

! Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.



Warning

Once you submit your amendment you will not be able edit it.

Note

Depending on your account settings, this record type may have additional custom fields or sections.

Note

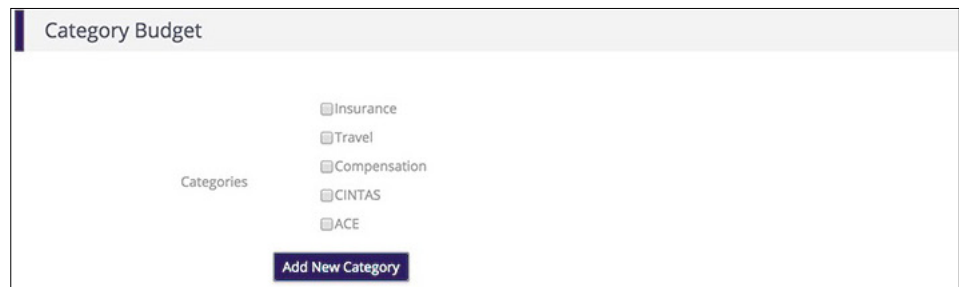
If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

How To Add a **Category Budget** Amendment Type

1. Click **Category Budget**. If the amendment type is not active, click the **○ (Activate icon)** to activate.



2. Add the proposed **Amendment Name**.
3. In the *Date Requested* field, select the date you will submit the amendment. If the *Date Requested* field is left empty, the date the amendment is submitted through Euna Grants (i.e., the date the *Submit* button is clicked) will be recorded.
4. In the *Category Budget* section, select all applicable categories. If a category is not available, you can add it by clicking **Add New Category**. The *Category Name* and *Proposed Budgeted Category Total* fields will appear in the *Budget Categories* section below.

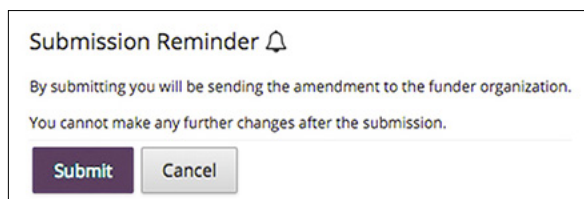


Budget Categories

5. Add the **proposed budget amount by category** in the respective *Proposed Budgeted Category Total* field(s). The current and actuals amount per category is listed above each field for reference. If you have added a new category, you can enter the new category in the *Name Category* field.
6. Add the **Justification** for your proposed amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. Add any *Internal Notes* about the amendment for you or your staff to view.
9. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected amendment types) to the funding organization.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.



How To Add a **Performance Goal** Amendment Type

Warning

Once you submit your amendment you will not be able edit it.

Note

Depending on your account settings, this record type may have additional custom fields or sections.

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

1. Click **Performance Goal**. If the Amendment Type is not active, click the **(Activate icon)** to activate.

2. In the *Amendment Name* field, enter a **name** for your proposed amendment.
3. In the *Date Requested* field, select the **date you will submit the amendment**. If the *Date Requested* field is left empty, the date the amendment is submitted through Euna Grants (i.e., the date the **Submit** button is clicked) will be recorded.

Performance Plan Goal


4. Select all applicable **goals**. If a goal is not available, you can add it by clicking **Add New Goal**. A *Goal Type* field will appear in the *Current Performance Plan Goals* section below.

Current Performance Plan Goals

5. Add the proposed **goal(s)** in the respective *Goal Type* field(s). The current goal is listed above each field for reference. If you have added a new goal, you can enter the new **category** in the *Goal Type* field.

Current Performance Goals		
Goal Type: Percent Achieved Volunteer retention rate	Desired Percentage 50.0%	Proposed Desired Percentage <input type="text"/>
Goal Type: Percentage Changed Increase percent of brochure requests made online	Current Percentage 5.0%	Desired Percentage 10.0%
		Proposed Desired Percentage <input type="text"/>

6. In the *Request/Justification* field, add the **reason or justification** for your proposed amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. In the *Internal Notes* field, add any **notes** about the amendment for you or your staff to view.
9. Click **Save** to save your progress or click **Submit** to send your completed amendment (including all selected Amendment Types) to the funding organization. Click **Cancel** to close amendment without saving any changes.

Submission Reminder 

By submitting you will be sending the amendment to the funder organization.
You cannot make any further changes after the submission.












Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Warning

Once you submit your amendment you will not be able edit it.

Icons

-  Print
-  Help
-  Save Current View
-  Send Email
-  Edit
-  Add
-  Remove
-  Delete
-  Calendar
-  Activate
-  Deactivate

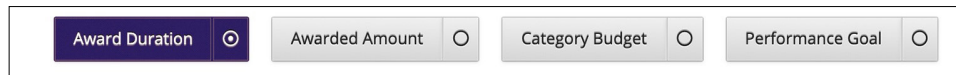
Recording an Amendment

If you have received a grant from a funding organization that is not in Euna Grants, you may wish to record an approved amendment in Euna Grants. If you wish to record an approved amendment for a grant you have awarded, see [How to Add an Amendment to an Award as a Record](#).

Prerequisite: The grant cannot have a sub-recipient.

Amendments can have as many as four parts: [Awarded Amount](#), [Award Duration](#), [Category Budget](#), and [Performance Goal](#).

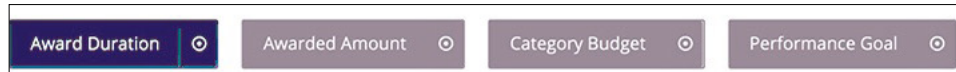
1. Open **Grants Management>Grants**.
2. Click a **grant name**.
3. Open the **Post-Award tab>Amendments**.
4. Click the **+** (**Add icon**) in the *Icon Bar*.
5. To add an amendment type, click the (**Activate icon**) on the grayed-out tab.



6. Enter the information for the selected amendment type.
7. Click **Save**.

How to Add an Award Duration Amendment Type

1. Click **Award Duration**. If the amendment type is not active, click the (**Activate icon**) to activate.



Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.
4. Select the **Approved End Date** and **Approved Close Out Date**. The *Current End Date* and *Current Close Out Date* are listed for reference.
5. Add the **Justification** for your amendment.
6. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save**.

How To Add an Awarded Amount

Amendment Type

1. Click **Awarded Amount**. If the amendment type is not active, click the **(Activate icon)** to activate.



Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.
4. Add the new **Approved Total Awarded Amount**. The *Current Total Awarded Amount* is listed above this field for reference.
5. Add the **Justification** for your amendment.
6. To *Attach Documentation*, click **Choose File** and select a file from your computer.
7. Add any **Internal Notes** about the amendment for you or your staff to view.
8. Click **Save**.

Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

How To Add a **Category Budget** Amendment Type

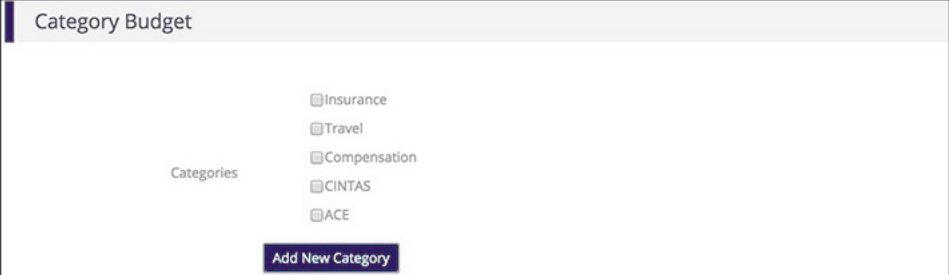
1. Click **Category Budget**. If the amendment type is not active, click the **(Activate icon)** to activate.



2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.

Category Budget

4. Select all applicable **categories**. If a category is not available, you can add it by clicking **Add New Category**. **Category Name** and **Proposed Budgeted Category Total** fields will appear in the *Budget Categories* section below.



Budget Categories

Note

If your amendment includes multiple amendment types, the *Amendment Name* and *Date Approved* fields will be the same for each type.

5. Add the **budget amount by category** in the respective *Budgeted Category Total* field(s). The current and actuals amount per category is listed above each field for reference. If you have added a new category, you can enter the new **category** in the *Name Category* field.
6. Add the **Justification** for your amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. Add any **Internal Notes** about the amendment for you or your staff to view.
9. Click **Save**.

! Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

How To Add a Performance Goal Amendment Type

1. Click **Performance Goal**. If the amendment type is not active, click the **(Activate icon)** to activate.

A row of four buttons: 'Award Duration', 'Awarded Amount', 'Category Budget', and 'Performance Goal'. The 'Performance Goal' button is highlighted in dark blue, while the others are grey.

2. Add the **Amendment Name**.
3. In the *Date Approved* field, select the **date the amendment was approved**.

Performance Plan Goal

4. Select all applicable **goals**. If a goal is not available, you can add it by clicking **Add New Goal**. A *Goal Type* field will appear in the *Current Performance Plan Goals* section below.

A dialog box titled 'Add New Goal'. It contains a section 'Current Performance Goals' with a 'Goal Type' dropdown menu (set to 'Numeric') and a 'Name' input field.








Current Performance Plan Goals

5. Add the approved **goal(s)** in the respective *Goal Type* field(s). The current goal is listed above each field for reference. If you have added a new goal, you can enter the new **category** in the *Goal Type* field.
6. Add the **Justification** for your amendment.
7. To *Attach Documentation*, click **Choose a file** to select a file from your computer.
8. Add any **Internal Notes** about the amendment for you or your staff to view.
9. Click **Save**.

! Note

Anything added to the *Internal Notes* field will not be visible to the funder when the amendment response is submitted.

Icons

-  Print
-  Help
-  Add
-  View
-  Edit
-  Copy
-  Delete

Managing Amendments

How To View an Amendment

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Amendments**.
4. Click the **Q (View icon)** next to an amendment name.

Amendment Name	Date Created
Amendment	11/3/2016

How To View an Amendment Status

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Amendments**.
4. Click on an **amendment name**.

Amendment						
Amendment Type	Date Created	Date Submitted	Amendment Creator	Type	Submitted By	Internal Notes
Awarded Amount	11/3/2016			Funder		
Award Duration	11/3/2016			Funder		

How To Edit an Amendment

Prerequisite: Amendment cannot be submitted to funder.

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.
3. Open **Post-Award tab>Amendments**.
4. Click the **✎ (Edit icon)** next to an amendment name.


Amendment Name	Date Created
Amendment	11/3/2016

5. Update the information as necessary.
6. Click **Save**.

How to Delete an Amendment

Prerequisite: Amendment cannot be submitted to funder.

1. Open **Grant Management>Grants Awarded**.
2. Click on a **grant name**.

3. Open **Post-Award tab>Amendments**.
4. Click the  (**Delete icon**) next to an amendment name.

Amendment Name	Date Created
Amendment	11/3/2016

5. In the confirmation pop-up window, click **Delete**.

Amendments FAQs

Who can add budget line items?

If the funding organization allows it, the Grant Manager and Organizational Admin can add budget line items.

Who can add expenses?

If the funding organization allows it, Grant Manager, and Organizational Admin can add expenses.

Who can add goals?

If the funding organization allows it, the Grant Manager and Organizational Admin can add goals.

Who can add achievements?

If the funding organization allows it, Grant Manager, and Organizational Admin can add achievements.

What if a funding organization changes an amendment status to Needs More Information?

If the funding organization changes the status to Needs More Information, you will have to add a new Amendment with the requested information and resubmit.

Can I track a new amendment of a received grant if the funding organization is not in Euna Grants?

No, there is no way to track the status of a new amendment if the funding organization is not in Euna Grants. You can only add approved amendments as a record.

Amendments Glossary

Actuals Total	Total of actuals for the award.
Amendment Creator	The party (funder or recipient) who created the amendment.
Amendment Name	The name the amendment creator has given the amendment.
Amendment Request	The proposed amendment from the recipient.
Amendment Type	The type of amendment added: Award Amount, Award Duration, Award Budget, or Program Goals.
Approved	The funder has approved the amendment. The funder may approve an amendment with changes.
Approved Budgeted Category Total	The funder's approved amount for a budget category.
Approved Close Out Date	The funder's approved close out date for the award. The close out date is six months after the award end date.
Approved Desired Percentage	The funder's approved percentage for a percent achieved or percent change goal.
Approved End Date	The funder's approved end date for the award.
Approved Length of Award	The funder's approved length of time for the award.
Approved Number To Be Achieved	The funder's approved number to be achieved for a numeric goal.
Approved Rate Per Achievement	The funder's approved dollar amount per achievement unit for a reimbursement goal.
Approved Total Awarded Amount	The funder's approved total award amount.
Approved Units To Be Achieved	The funder's approved number of units to be achieved for a reimbursement goal.
Attach Documentation	Supporting documentation that can be added to the amendment request or response.
Award	The awarded amount amendment type.
Award Duration	The award duration amendment type.
Awarded Amount	The awarded amount amendment type.
Budget	The budget amendment type.

Budget Categories	The grant's budget categories.
Cancel	Exit page without saving changes.
Categories (Budget)	The grant's budget categories.
Current Budgeted Amount	The grant's current total budgeted amount.
Current Budgeted Category Total	The grant's current budget total for a category.
Current Close Out Date	The current close out date for the award. The close out date is six months after the award end date.
Current End Date	The award's current end date.
Current Length of Award	The award's current length of time (in years and months).
Current Number To Be Achieved	The award's current goal number to be achieved for a numeric goal.
Current Percentage	The grant's current goal percentage for a percent achieved or percentage changed goal.
Current Rate Per Achievement	The grant's current dollar amount per achievement unit for a reimbursement goal.
Current Total Awarded Amount	The grant's current total award amount.
Current Units To Be Achieved	The grant's current goal number of units to be achieved for a reimbursement goal.
Date Requested	The date the amendment was submitted to the funder.
Date Created	The date the amendment was created in Euna Grants.
Date Submitted	The date the recipient submitted the amendment or the date the amendment was finalized in Euna Grants.
Denied	The amendment has been denied by the funder.
Desired Percentage	The current goal percentage to be achieved.
Duration	The award duration amendment type.
Goal Type	Amendable goals may be quantified using four different types: numeric, percent achieved, percent change, and reimbursement goals. The goal types allow staff to track progress based on the planned item.

Goals	Measurable activities planned to ensure grant deliverables are met on the award's timeline.
In Process	The amendment has been submitted and is being reviewed by the funder.
Internal Notes	Notes on the amendment visible to your organization only.
Needs More Information	The funder needs more information to reach a decision on the amendment.
Numeric (Goal)	Goal to achieve a discrete number.
Percent Achieved (Goal)	Goal to reach a desired percent
Percent Changed (Goal)	Goal to track a percent increase or decrease.
Performance Plan	Goal Measurable activities planned to ensure grant deliverables are met on the award's timeline.
Program Goals	Measurable activities planned to ensure grant deliverables are met on the award's timeline.
Proposed Budgeted Amount	The recipient's new proposed total budget amount.
Proposed Budgeted Category Total	The recipient's new proposed budget amount for a category.
Proposed Close Out Date	The recipient's new proposed close out date for the award. The close out date is six months after the award end date.
Proposed Desired Percentage	The recipient's new proposed percentage for a percent achieved or percentage changed goal.
Proposed End Date	The recipient's new proposed end date for the award.
Proposed Length of Award	The recipient's new proposed length of time of award (in years and months).
Proposed Number To Be Achieved	The recipient's new proposed number to be achieved for a numeric goal.
Proposed Rate Per Achievement	The recipient's new proposed dollar amount per achievement unit for a reimbursement goal.
Proposed Total Awarded Amount	The recipient's new proposed total award amount.
Proposed Units To Be Achieved	The recipient's new proposed number of units to be achieved for a reimbursement goal.
Reasoning	The funder's reason or justification for the amendment decision.

Reimbursement (Goal)	Goals with a discrete unit to achieve, and a dollar rate associated per unit.
Request/Justification	The recipient's reason or justification for the amendment request.
Save	Save your progress.
Saved	The amendment has been saved but not submitted.
Status	The funder's decision on the amendment.
Submit	Send your completed amendment (including all selected Amendment Types) to the funding organization or finalize your amendment record in Euna Grants.
Submitted	The amendment has been submitted to the funding organization for review.
Submitted By	The user who submitted the amendment.