Modifying a Grant Project Budget

Purpose: Use this document as a reference for modifying a Grant Award Project Budget in ctcLink.

Audience: Finance/Grant Fiscal Staff.

You must have at least one of these local college managed security roles:

- ZC Awards Processing
- ZZ Awards Processing

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Modifying a Grant Award Project Budget

Navigation: Grants > Awards > Project Budgets

1. On the **Project Budgets** search page, use the **Find an Existing Value** tab to search for a project.
2. Enter or select the appropriate business unit in the **Business Unit** field.
3. Enter or select the project number of the project to modify the budget for in the **Project** field.
4. Select the **Search** button. Note: If you have personalized this page, your screen will look different than the screenshots and video below show. Be sure to update all applicable fields as described below.

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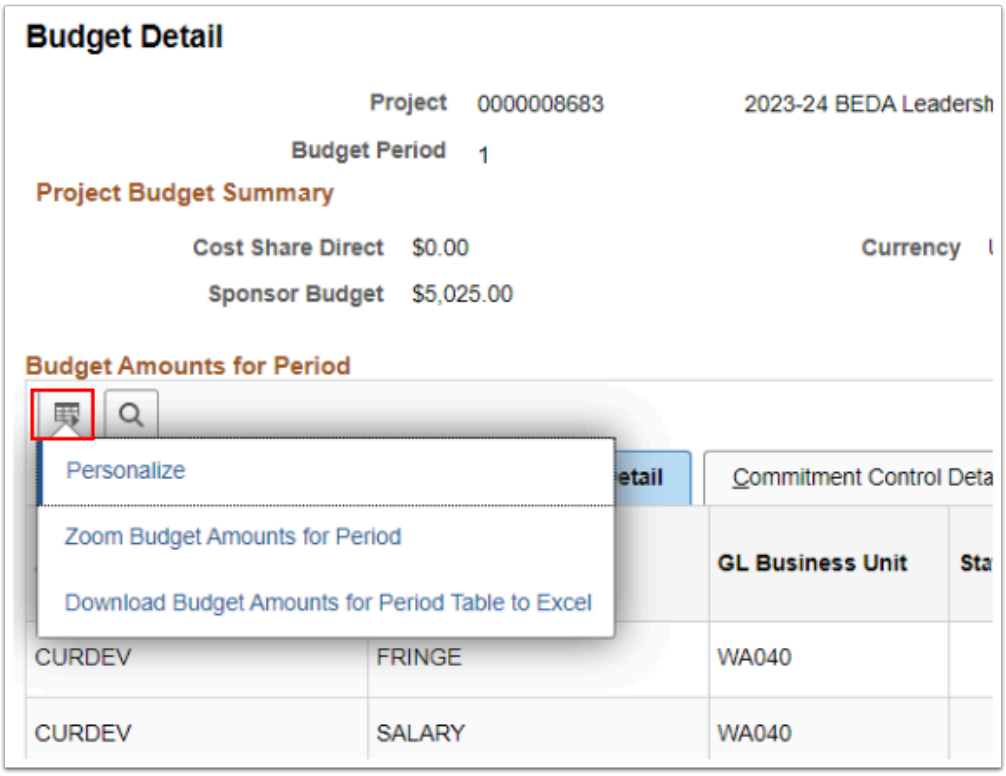
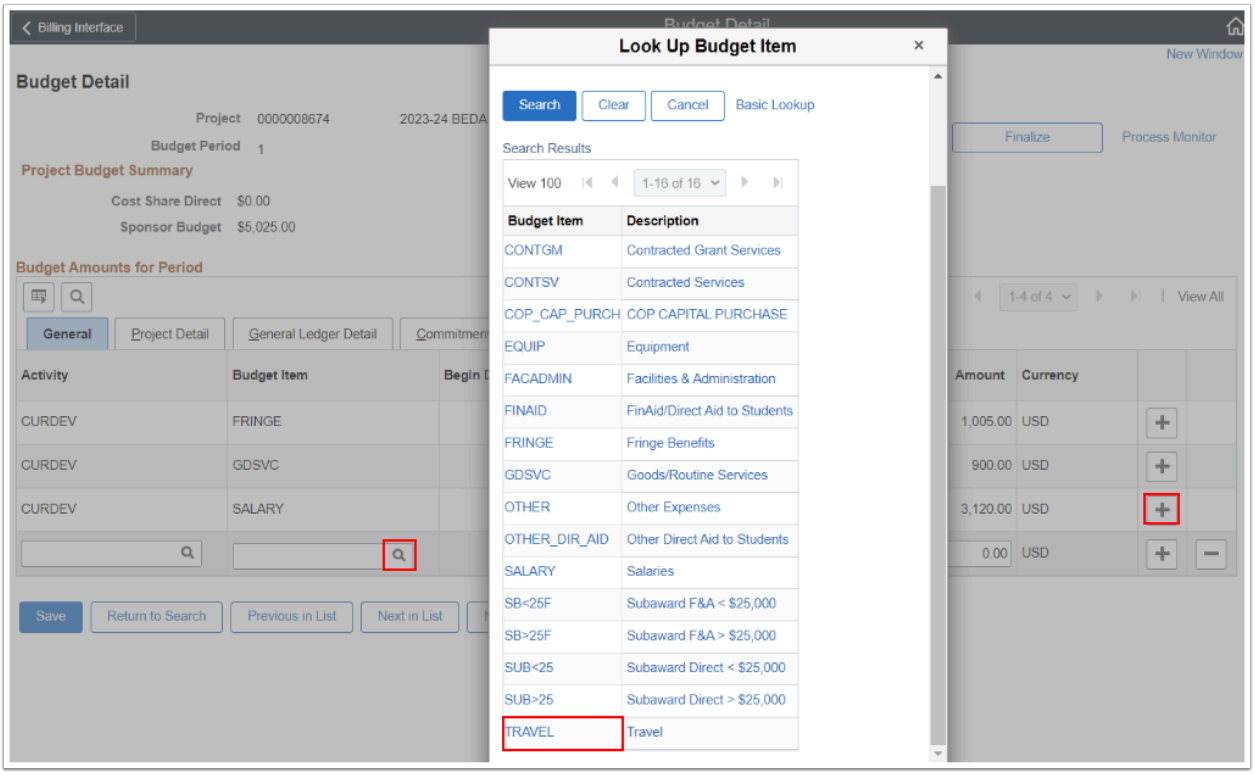
To *Personalize* columns or *download to Excel spreadsheet* for analysis, select the **Grid Action Menu** or **spreadsheet icon.**



5. The Budget Detail page displays. Use the **Budget Detail** page to enter/modify the project budget.
6. Review the current budget line items.
7. Scroll to the far right of the page to select the **Add a new row [+]** icon at the end of the row to create a new budget line(s) for this project.

Note Grants and Projects are Budgeted at the Roll-up Level. By selecting the **Budget Item** first, the Roll-up GL **Account** will auto populate. If you need to use a different **Account**, change the **Budget Item** rather than overwriting the **Account.** Please see next step how to enter the Budget Details.

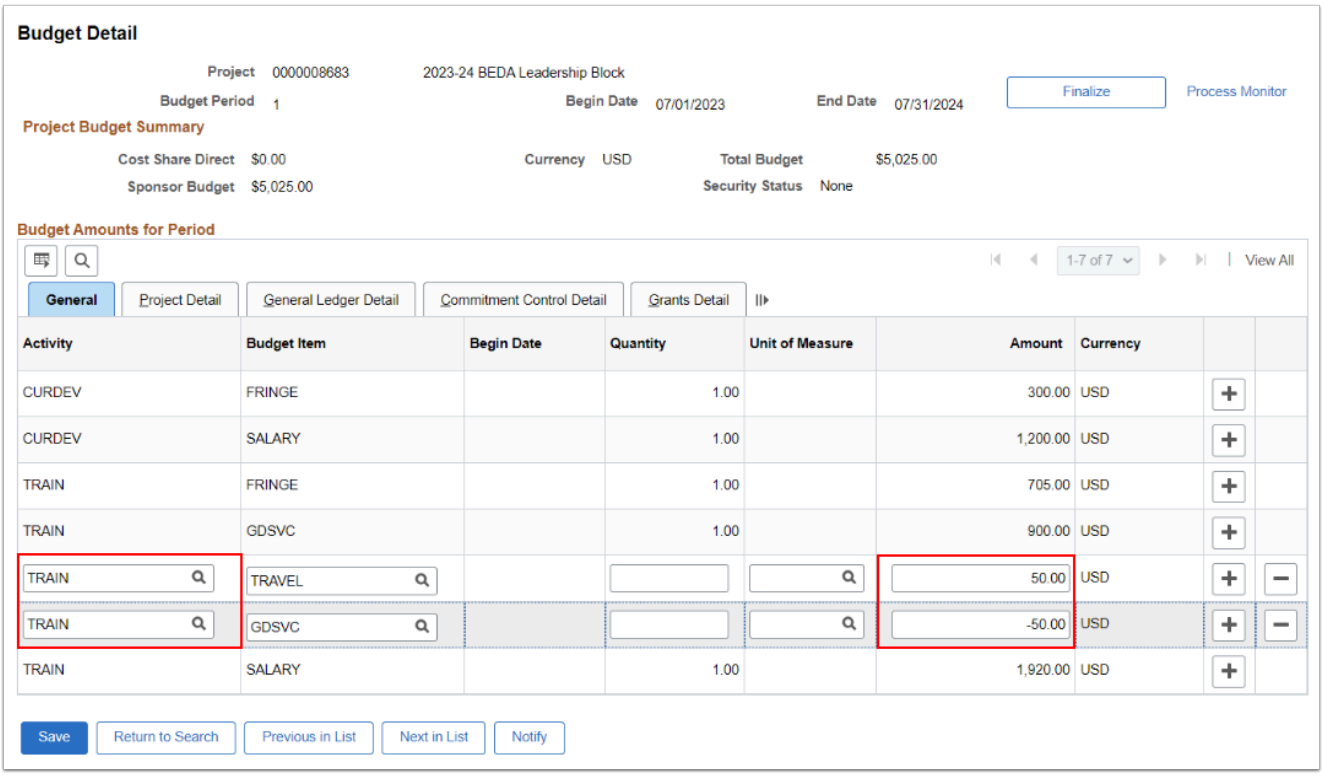


8. Depending upon your Budget Detail setup, enter the Budget changes to each Activity and corresponding Amount(s) changes.

The Analysis Type defaults to **BUD** for Budget.

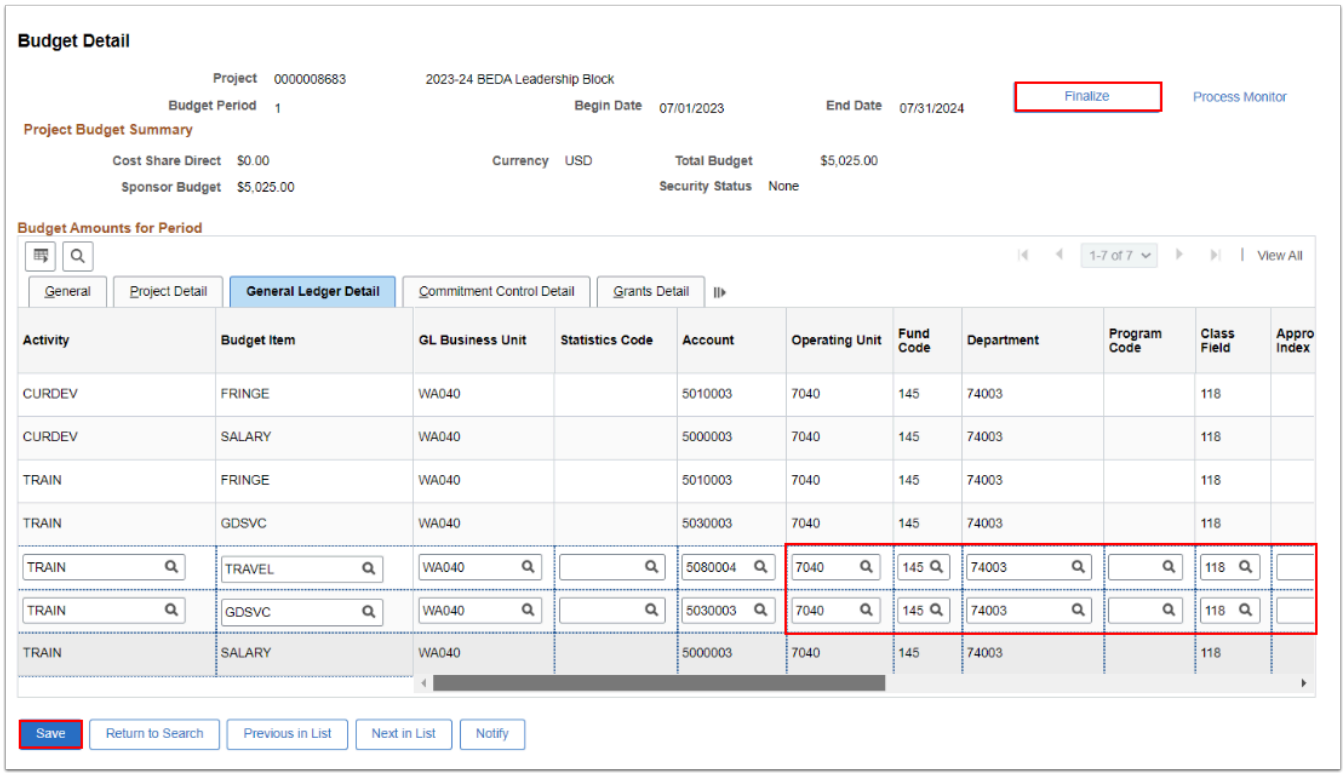
Note: When modifying budget line(s) you will need to create a new budget line and then make the adjustments.

Example: $50 of Goods & Services needs to be moved to Travel. First you would create a new line, the amount would be $ -50.00 with the budget item of Goods & Services. Then you would create another line with $50 to Travel. Double check to make sure your ChartStrings are completely filled out and are correct. Note the Total Grant Award stays the same in this example. If total award has increased/decreased, make adjustments as needed however a Contract Amendment is required. At the end of this process, the QRGs are linked below for quick reference.



9. Select the **General Ledger Detail** tab. Enter valid field values for each new Budget Row line(s):
   a. Verify the **Activity** (also your Budget ID).
   b. Enter the **Operating Unit.**
   c. Enter the **Fund Code.**
   d. Enter the **Department.**
   e. Enter the **Class.**

10. Select the **Save** button.
11. Select the **Finalize** button. The system finalizes the plan by picking up the rows only for a budget period and not the entire plan, as in Project Costing.
12. Read the displayed message within the Message window.
13. Select the **OK** button.

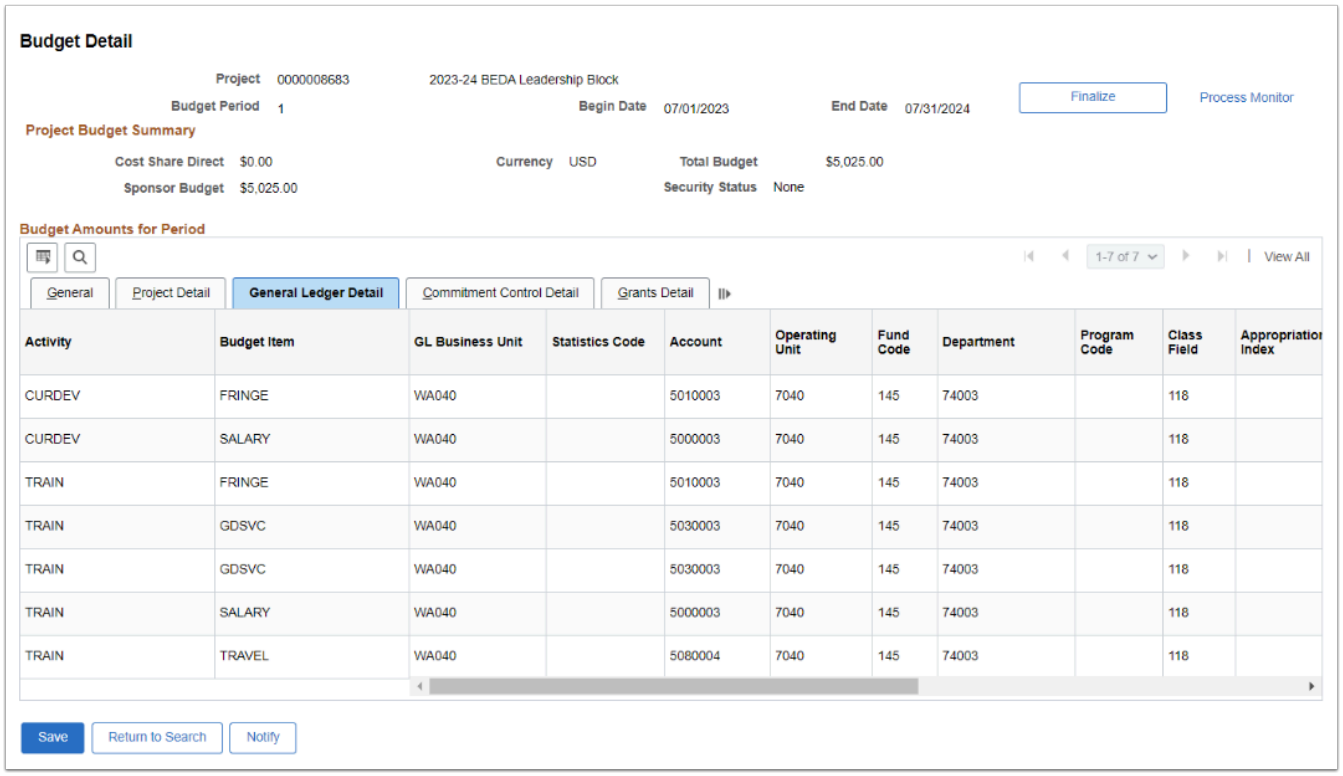


Activity	Budget Item	GL Business Unit	Statistics Code	Account	Operating Unit	Fund Code	Department	Program Code	Class Field	Appro Index
CURDEV	FRINGE	WA040		5010003	7040	145	74003		118	
CURDEV	SALARY	WA040		5000003	7040	145	74003		118	
TRAIN	FRINGE	WA040		5010003	7040	145	74003		118	
TRAIN	GDSVC	WA040		5030003	7040	145	74003		118	
TRAIN	TRAVEL	WA040		5080004	7040	145	74003		118	
TRAIN	GDSVC	WA040		5030003	7040	145	74003		118	
TRAIN	SALARY	WA040		5000003	7040	145	74003		118	

14. The message window disappears.
15. Select **Process Monitor** link. For more information on this process, please see QRG Process Scheduler/Process Monitor. The process has finished successfully when the **Run Status** column indicates 'Success' and the **Distribution Status** is 'Posted'.

Optional to select the **Commitment Control Detail** tab to display the ledger and ledger group that the system uses to book the budget journals. This tab also displays the **Commitment Control Status** and once posted, the **Journal ID** creating the budget. The **Commitment Control Status** should be set to 'None' until the **Finalize** button is used and then it should change to 'Distributed' and a Journal ID number appears on the row.

NOTE: Once the finalize process runs to success, upon returning to the Budget Detail > General Ledger Detail page to verify the posted Budget lines are "grayed" out and no longer editable. If the lines are editable, check all required field values are entered and correct, resave and select the Finalize button again.



Budget Detail

Project 0000008683 2023-24 BEDA Leadership Block

Budget Period 1 Begin Date 07/01/2023 End Date 07/31/2024

Finalize Process Monitor

Project Budget Summary

Cost Share Direct $0.00 Currency USD Total Budget $5,025.00

Sponsor Budget $5,025.00 Security Status None

Budget Amounts for Period

1-7 of 7 View All

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

Activity	Budget Item	GL Business Unit	Statistics Code	Account	Operating Unit	Fund Code	Department	Program Code	Class Field	Appropriation Index
CURDEV	FRINGE	WA040		5010003	7040	145	74003		118	
CURDEV	SALARY	WA040		5000003	7040	145	74003		118	
TRAIN	FRINGE	WA040		5010003	7040	145	74003		118	
TRAIN	GDSVC	WA040		5030003	7040	145	74003		118	
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TRAIN	SALARY	WA040		5000003	7040	145	74003		118	
TRAIN	TRAVEL	WA040		5080004	7040	145	74003		118	

Save Return to Search Notify

If your Award Contract has a Budget Revisions that Increases/Decreases from the original total amount, you will need to do a Contract Amendment and Increase/ Decrease the total Contract Amount. The ***Total Grant Award*** should equal the ***Total Contract Award.***

Please see the following QRGs for Contract Amendments:

- CRC: Reimbursable Contract Billing Limit Amendment
- FPC: Fixed Contract Billing Limit Amendment

16. Process complete.

Video Tutorial

The video below demonstrates the process actions described in the steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial Via Panopto

View the external link to Modifying a Grant Project Budget. This link will open in a new tab/ window.