Quick Sheet: Carryover Amendment

Audience: Grantees

Purpose

This Quick Sheet provides step-by-step instructions for submitting a *Carryover Request* amendment in GrantSolutions. samer

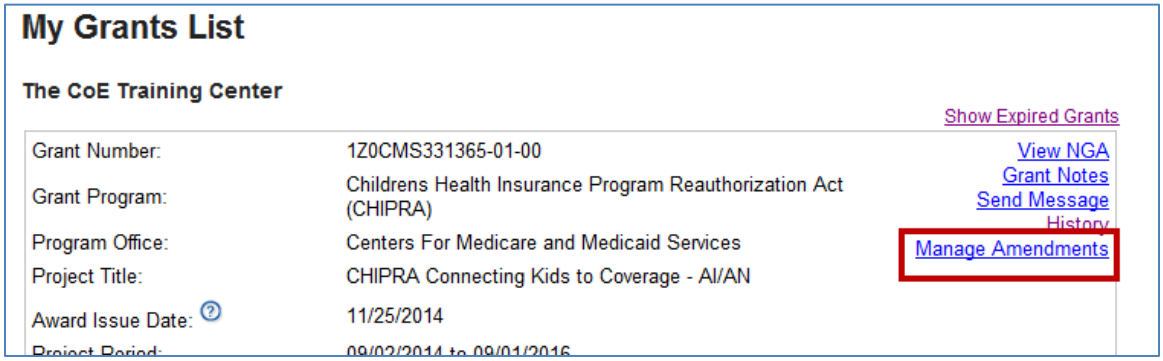
An amendment is a post-award change to a grant. A *Carryover Request* is an amendment action that typically occurs when a Grantee wishes to move funding from one budget period (elapsed) to an active budget period.

Note: Please contact the awarding agency for policy guidance on submitting Carryover Requests.

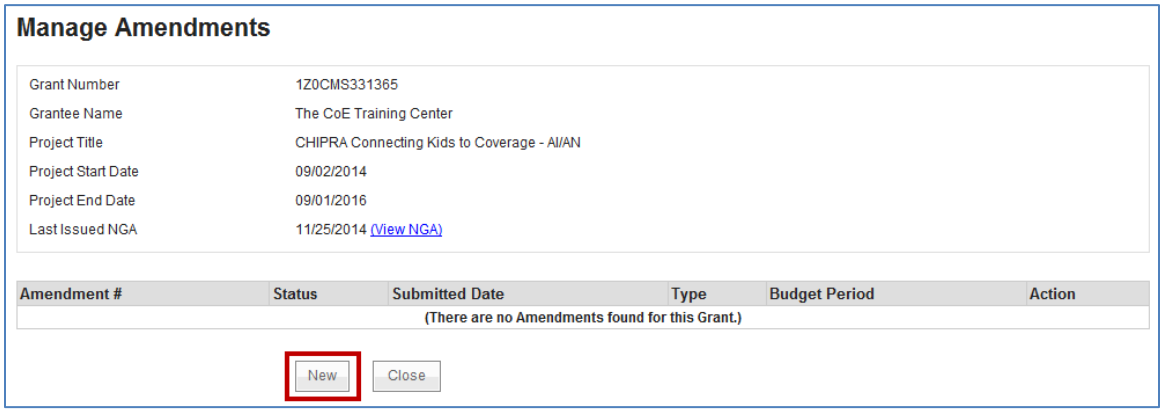
Steps

To initiate a new amendment, follow the below steps:

1. Log into GrantSolutions.
2. The "My Grants List" screen appears. Locate the desired grant and click the **Manage Amendments** link.

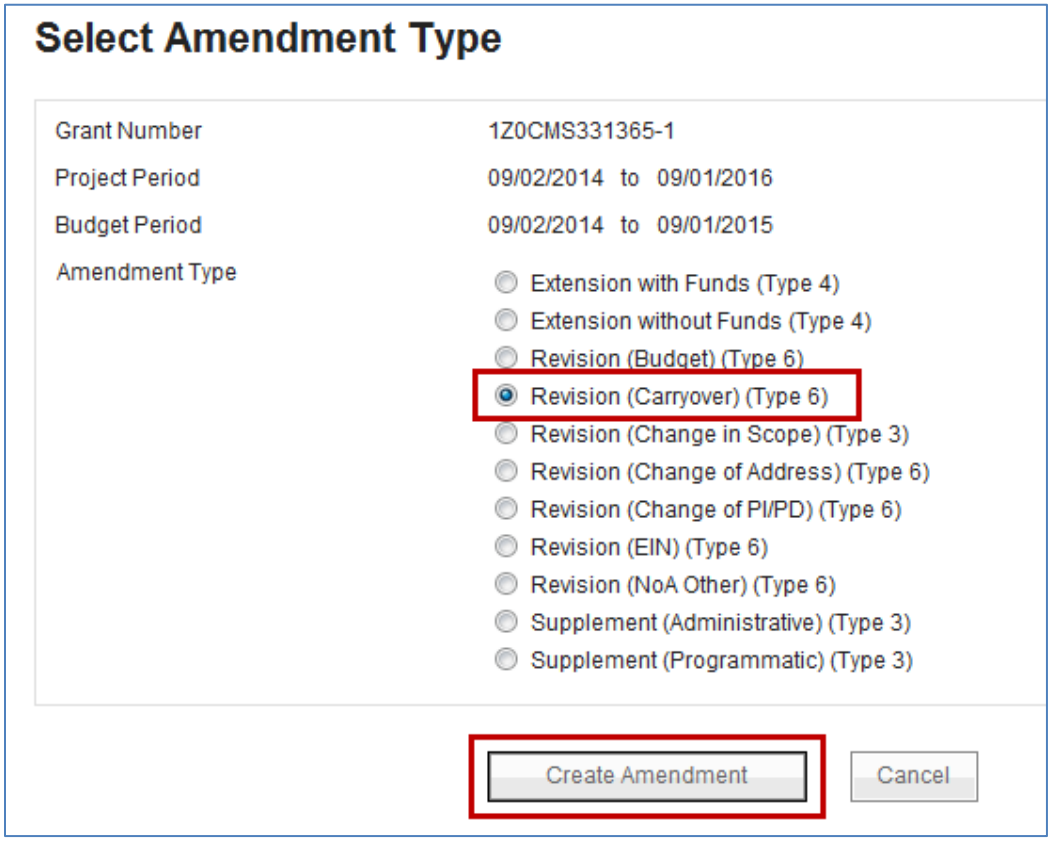


3. The "Manage Amendments" screen appears. All amendments are initiated and tracked from this screen. To begin a new amendment action, click the **New** button.



4. The "Select Amendment Type" screen appears. Click the radio button to the left of the Carryover amendment type, and then click the **Create Amendment** button.

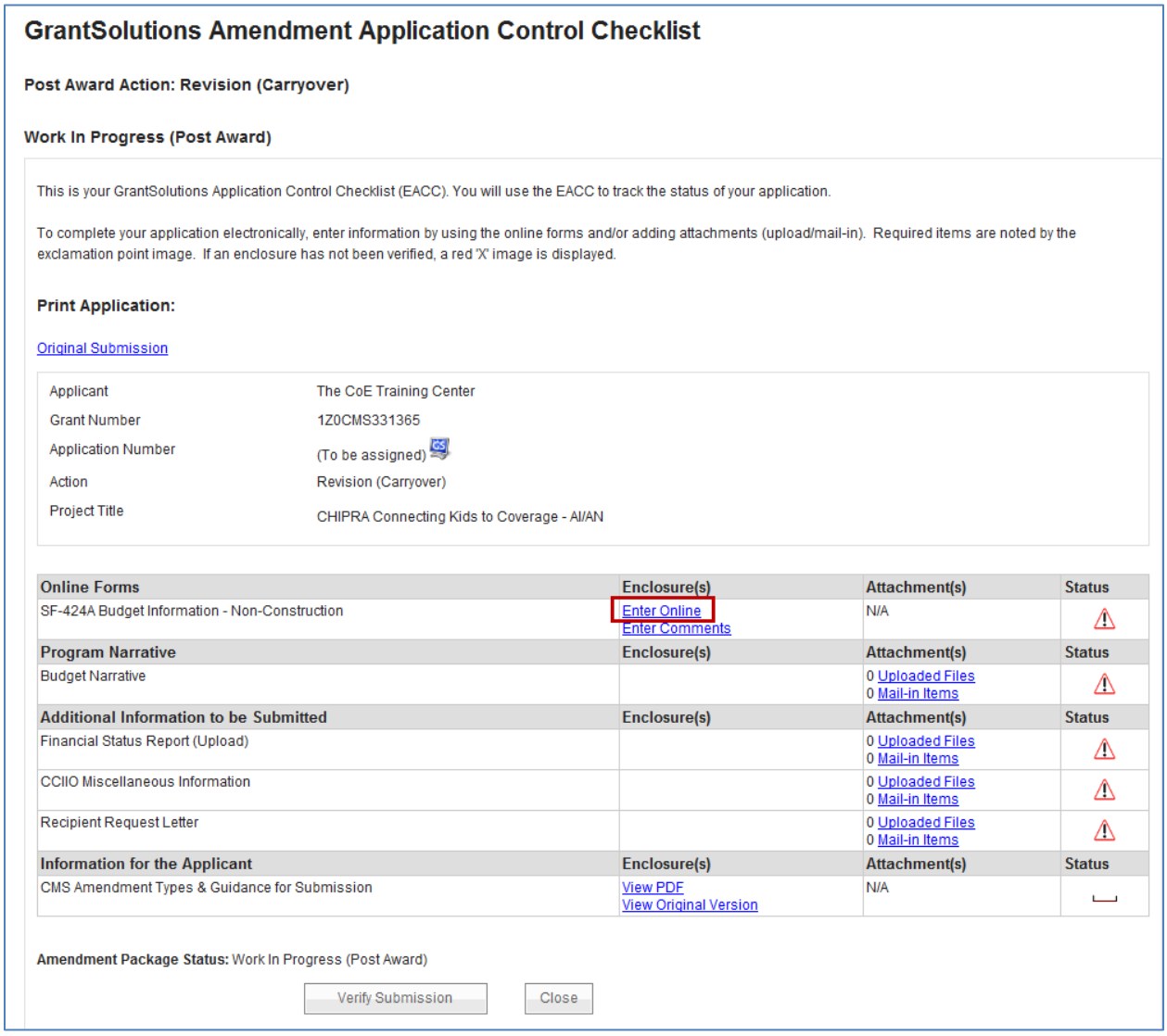
   Note: Amendment names (i.e. unobligated, carryover, etc.) vary depending on the awarding agency. The image below is a sample of a Carryover.



5. The "GrantSolutions Amendment Application Control Checklist" screen appears. Scroll to the application kit (application package) section, which contains the forms to complete and links to upload documents.

   Note: Required forms and attachments vary by awarding agency.

6. To electronically complete the SF-424A, click the **Enter Online** link from the *Enclosures* column of the SF-424A Budget Information – Non-Construction row.



GrantSolutions Amendment Application Control Checklist

Post Award Action: Revision (Carryover)

Work In Progress (Post Award)

This is your GrantSolutions Application Control Checklist (EACC). You will use the EACC to track the status of your application.

To complete your application electronically, enter information by using the online forms and/or adding attachments (upload/mail-in). Required items are noted by the exclamation point image. If an enclosure has not been verified, a red 'X' image is displayed.

Print Application:

Original Submission

Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Application Number	(To be assigned)
Action	Revision (Carryover)
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN

Online Forms	Enclosure(s)	Attachment(s)	Status
SF-424A Budget Information - Non-Construction	Enter Online Enter Comments	N/A	
Program Narrative	**Enclosure(s)**	**Attachment(s)**	**Status**
Budget Narrative		0 Uploaded Files 0 Mail-in Items	
Additional Information to be Submitted	**Enclosure(s)**	**Attachment(s)**	**Status**
Financial Status Report (Upload)		0 Uploaded Files 0 Mail-in Items	
CCIIO Miscellaneous Information		0 Uploaded Files 0 Mail-in Items	
Recipient Request Letter		0 Uploaded Files 0 Mail-in Items	
Information for the Applicant	**Enclosure(s)**	**Attachment(s)**	**Status**
CMS Amendment Types & Guidance for Submission	View PDF View Original Version	N/A	

Amendment Package Status: Work In Progress (Post Award)

Verify Submission Close

7. The "SF-424A" screen appears. In *Section A*, enter the total amount of the Carryover Request (in this case $100,000) in the **Estimated Unobligated Funds** column under **Federal (C).**

8. Enter the total amount of the Carryover Request (in this case $100,000) in the **New or Revised Budget** column under **Federal (E)**.

9. In *Section B* (Budget Categories) - Enter the **Object Class Category** amounts. The total in Section B must equal the total in Section A.

   Note: Enter only numbers – dollar signs and commas are not permitted.

SF-424A

OMB Number 4040-0006
Expiration Date 06/30/2014

BUDGET INFORMATION - NON CONSTRUCTION PROGRAMS

★ indicates a required field.

Organization Name	Project Title	Budget Period
The CoE Training Center	CHIPRA Connecting Kids to Coverage - AI/AN	Start Date ★ 09/02/2014
Application Number (To be assigned)	Project Period 09/02/2014 to 09/01/2016	End Date ★ 09/01/2015

424A Instructions

Section A Budget Summary

	Grant Program Function or Activity (a)	Catalog of Federal Domestic Assistance Number (b)	Estimated Unobligated Funds: Federal (c)	Estimated Unobligated Funds: Non Federal (d)	New or Revised Budget: Federal (e)	New or Revised Budget: Non Federal (f)	Total (g)
1.	Childrens Health Insurance Program Reauthorization Act	93.767 - Children's Health Ins	$ 100000.00	$ 0.00	$ 100000.00	$ 0.00	$100,000.00
2.	Childrens Health Insurance Program Reauthorization Act	Please select a CFDA	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
3.	Childrens Health Insurance Program Reauthorization Act	Please select a CFDA	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
4.	Childrens Health Insurance Program Reauthorization Act	Please select a CFDA	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
5. TOTALS (sum of lines 1-4)			$100,000.00	$0.00	$100,000.00	$0.00	$100,000.00

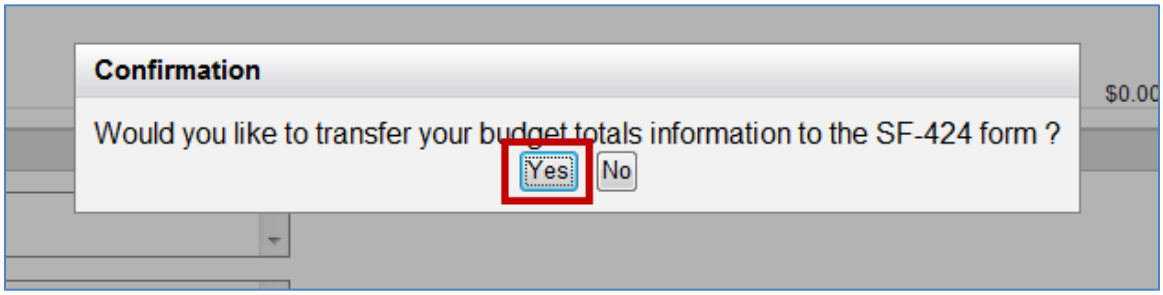
Section B Budget Categories

6. Object Class Categories

GRANT PROGRAM, FUNCTION OR ACTIVITY

	(1) Childrens Health Insurance Program Reauthorization Act(CHIPRA)	(2) Childrens Health Insurance Program Reauthorization Act(CHIPRA)	(3) Childrens Health Insurance Program Reauthorization Act(CHIPRA)	(4) Childrens Health Insurance Program Reauthorization Act(CHIPRA)	Total (5)
(a) Personnel	$ 50000.00	$ 0.00	$ 0.00	$ 0.00	$50,000.00
(b) Fringe Benefits	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
(c) Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
(d) Equipment	$ 50000.00	$ 0.00	$ 0.00	$ 0.00	$50,000.00
(e) Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
(f) Contractual	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
(g) Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00
(h) Other	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$0.00

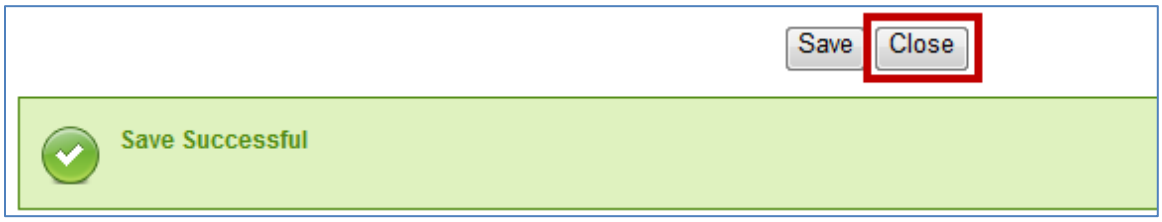
10. Toward the bottom of the screen, click the **Save** button.
11. If the "Would you like to transfer your budget totals information to the SF-424 form" message appears, click **Yes**.



12. If there are no errors, the *Save Successful* message appears at the bottom of the screen.

    Note: If there are problems, an error icon (red circle with white exclamation point) appears next to the cells that need corrections. To view the error text, point to the error icon with the mouse. Make change and then click the Save button again.

13. Click the **Close** button.



14. The "GrantSolutions Amendment Application Control Checklist" screen opens. A *Print Completed* link appears below the *Enter Online* link for the form that was just saved. The Print Completed link allows the user to open or save that form as a PDF. Additionally, the status column contains a green checkmark, indicating the form was successfully saved.

15. Complete additional forms and attach any necessary files. To attach a file, click the **Uploaded Files** link from the *Attachments* column.

SF-424A Budget Information - Non-Construction	Enter Online Print Completed Enter Comments	N/A	✓
Information for the Applicant	**Enclosure(s)**	**Attachment(s)**	**Status**
CMS Amendment Types & Guidance for Submission	View PDF View Original Version	N/A	
Program Narrative	**Enclosure(s)**	**Attachment(s)**	**Status**
Budget Narrative		1 Uploaded Files 0 Mail-in Items	⚠

16. The "Attachments" screen appears. Click the **Upload Attachment** button.

Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: The CoE Training Center
Application Number: (To be assigned)
Project Title: CHIPRA Connecting Kids to Coverage - AI/AN
Project Period: 09/02/2014 to 09/01/2016

Enclosure: Budget Narrative
Number of Attachments: 0

Item Description	Type	Review	Action
(Empty)			

Upload Attachment | Add Mail-in Item | Close

17. The "Attachment – Upload screen appears in a new window. Enter a file description in the **Description** field, **choose a file to** attach, and click the **Attach** button.

Attachment - Upload

Organization Name: The CoE Training Center
Application Number: (To be assigned)
Project Title: CHIPRA Connecting Kids to Coverage - AI/AN
Project Period: 09/02/2014 to 09/01/2016

*Description:

*Step 1: Select a file
Choose File No file chosen

Step 2: Press the attach button to have GrantSolutions upload the file. Please allow sufficient time for the file upload to complete. This will vary based upon your connection speed and the size of your file. If the file is successfully uploaded, you will be returned to the attachment list.

Attach Cancel

18. The "Attachments" screen appears and the attachment is visible. Click the **Close** button.

Attachments

You may upload file attachments or specify mail-in items for the enclosure below:

Organization Name: The CoE Training Center
Application Number: (To be assigned)
Project Title: CHIPRA Connecting Kids to Coverage - AI/AN
Project Period: 09/02/2014 to 09/01/2016

Enclosure: Budget Narrative
Number of Attachments: 1

Item Description	Type	Review	Action
Budget Narrative	Upload	Pending	Remove

Upload Attachment Add Mail-in Item Close

19. The "GrantSolutions Amendment Application Control Checklist" screen appears. Once all necessary forms are completed, attachments are uploaded, and there is one or more check mark in the *Status* column, click the **Verify Submission** button.

Program Narrative	Enclosure(s)	Attachment(s)	Status
Budget Narrative		1 Uploaded Files 0 Mail-in Items	✓
Additional Information to be Submitted	**Enclosure(s)**	**Attachment(s)**	**Status**
Financial Status Report (Upload)		1 Uploaded Files 0 Mail-in Items	✓
CCIIO Miscellaneous Information		1 Uploaded Files 0 Mail-in Items	✓
Recipient Request Letter		1 Uploaded Files 0 Mail-in Items	✓
Information for the Applicant	**Enclosure(s)**	**Attachment(s)**	**Status**
CMS Amendment Types & Guidance for Submission	View PDF View Original Version	N/A	

Amendment Package Status: Work In Progress (Post Award)

Verify Submission Close

20. The "GrantSolutions Amendment Submission Verification" screen appears. Review the page to ensure all online forms are listed. Click **Final Submission**.

GrantSolutions Amendment Submission Verification

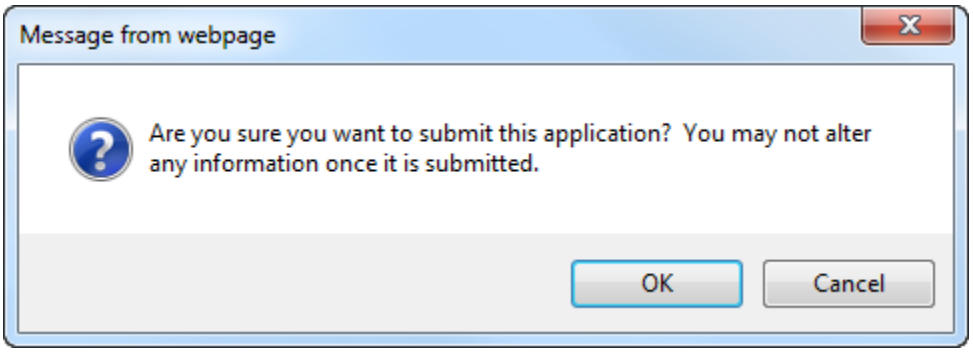
You are about to submit the following application:

Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Action	Revision (Carryover)

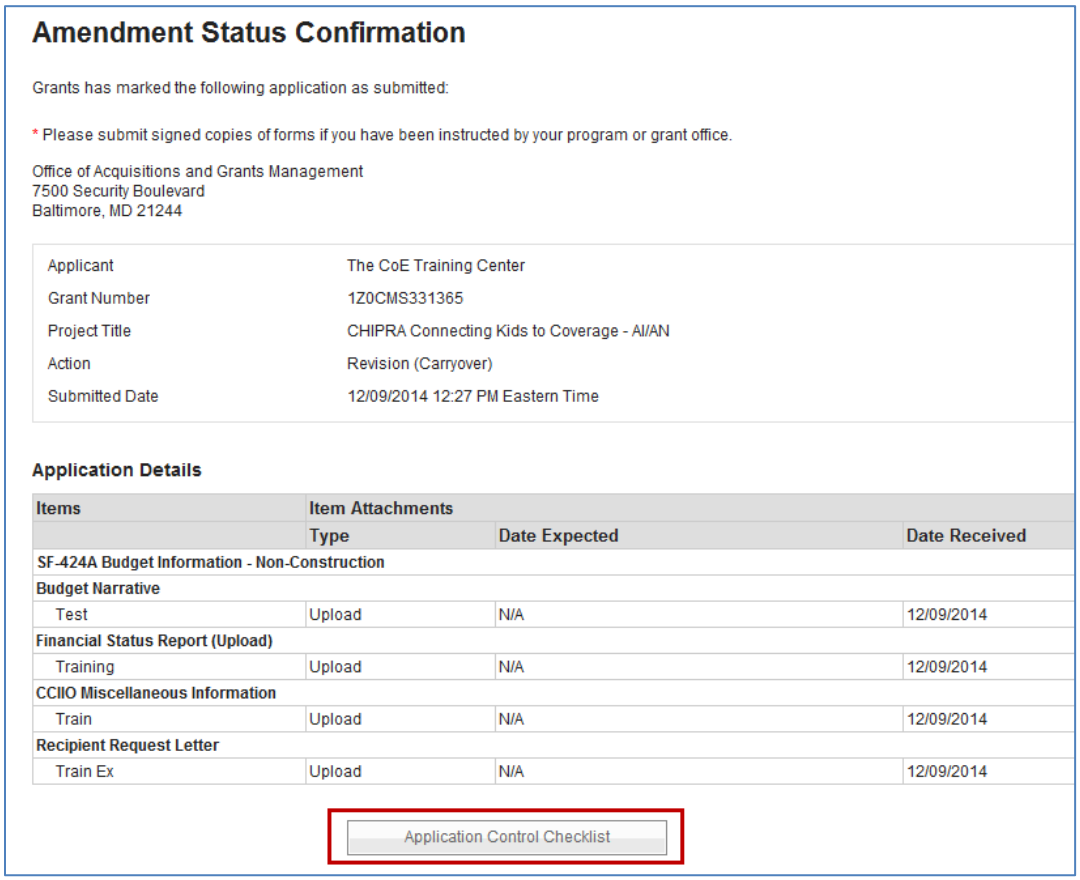
Online Forms
SF-424A Budget Information - Non-Construction
Program Narrative
Budget Narrative
----- (Upload) Test
Additional Information to be Submitted
Financial Status Report (Upload)
----- (Upload) Training
CCIIO Miscellaneous Information
----- (Upload) Train
Recipient Request Letter
----- (Upload) Train Ex

Final Submission Cancel

21. The "Are you sure you want to submit this application? You may not alter any information once it is submitted." message displays. Click Cancel to return to the previous screen or click **OK** to continue.



22. The "Amendment Status Confirmation" screen appears and the grantor receives email notification that the amendment application is submitted. Click the **Application Control Checklist** button to return to the now submitted application kit.



Amendment Status Confirmation

Grants has marked the following application as submitted:

* Please submit signed copies of forms if you have been instructed by your program or grant office.

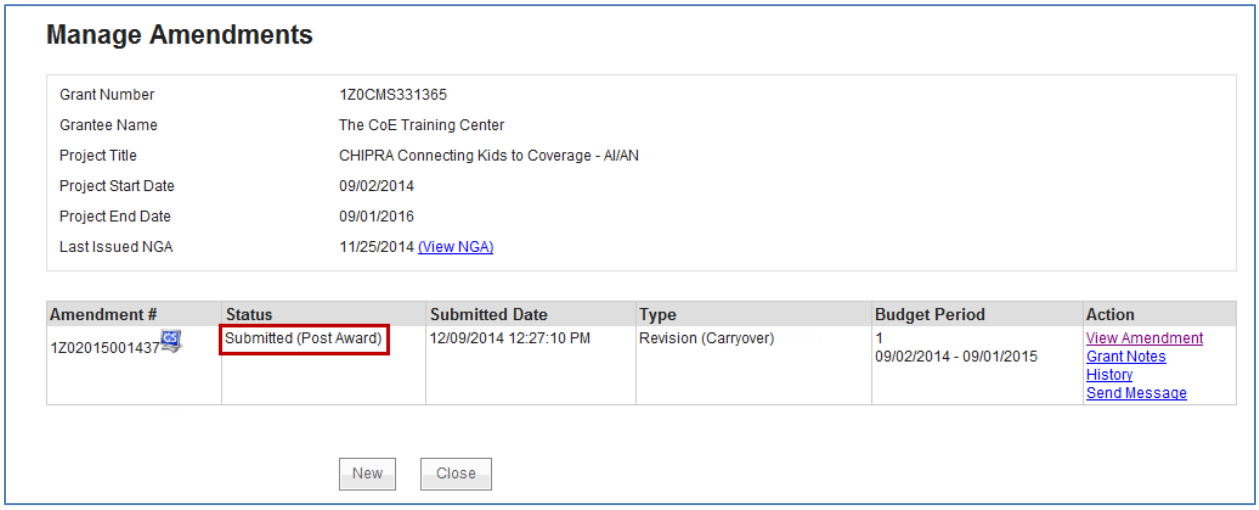
Office of Acquisitions and Grants Management
7500 Security Boulevard
Baltimore, MD 21244

Applicant	The CoE Training Center
Grant Number	1Z0CMS331365
Project Title	CHIPRA Connecting Kids to Coverage - AI/AN
Action	Revision (Carryover)
Submitted Date	12/09/2014 12:27 PM Eastern Time

Application Details

Items	Item Attachments		
	Type	Date Expected	Date Received
SF-424A Budget Information - Non-Construction			
Budget Narrative			
Test	Upload	N/A	12/09/2014
Financial Status Report (Upload)			
Training	Upload	N/A	12/09/2014
CCIIO Miscellaneous Information			
Train	Upload	N/A	12/09/2014
Recipient Request Letter			
Train Ex	Upload	N/A	12/09/2014

Application Control Checklist

23. The "GrantSolutions Amendment Application Control Checklist screen appears". Confirm that the status is *Submitted (Post Award).* Click the **Close** button at the bottom of the screen to return to Manage Amendments page.

24. The "Manage Amendments" screen appears. At this point, the grantee may not make further edits and has the option to view the submitted amendment application. As the amendment progresses through the review and approval process, the status updates.