

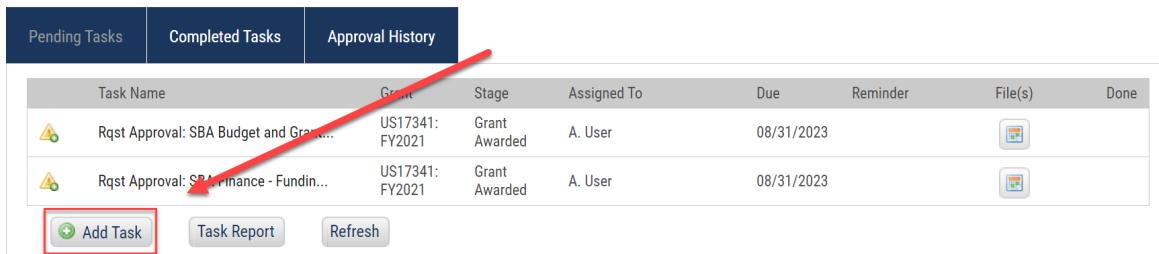
Grant Seeker Post-Award: Amendment Funding Source Adjustment Tasks

Objective: Agencies understand how to create a Funding Source Adjustment Task.

Summary: If an amendment/modification is issued for an Euna Grants Project & accompanying grant, agencies will need to follow **Section 4 - Award Adjustment/Award Amendment** of the [Award Management User Guide](#) to enter the Implementation Stage. If the amendment is a decrease or increase in the award amount, or a change in the budget period or period of performance, two advanced approval tasks must be created.

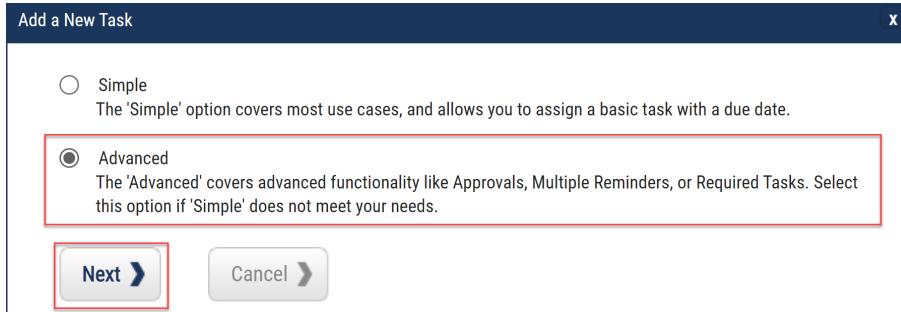
In addition to [Appendix D - Creating Advanced Tasks](#), additional details specifically for Amendments are below.

- 1) On the **Project Dashboard** page click **+ Add Task** button .



The screenshot shows a table of tasks. The first task is 'Rqst Approval: SBA Budget and Grant...' with a due date of 08/31/2023. The second task is 'Rqst Approval: SBA Performance - Fundin...' with a due date of 08/31/2023. At the bottom of the table, there are three buttons: 'Add Task' (highlighted with a red box), 'Task Report', and 'Refresh'.

- 2) Select **Advanced** and click the **Next >** button .



The dialog box has two radio button options: 'Simple' and 'Advanced'. The 'Advanced' option is selected and highlighted with a red box. Below the radio buttons, there is a note: 'The 'Advanced' covers advanced functionality like Approvals, Multiple Reminders, or Required Tasks. Select this option if 'Simple' does not meet your needs.' At the bottom, there are two buttons: 'Next >' (highlighted with a red box) and 'Cancel'.

- 3) The **Advanced Task Wizard** window will appear. For Funding Source Adjustment Tasks select:

- a. **Step 1**

- **Task Type***: Miscellaneous Task
- **Name***: 1. SBA Analyst - FS Adjustment
- **Grant***: Select the grant to which the task applies.
- **Stage***: Grant Awarded Stage
- **Task Scoring Rubric**: None.
- **Task Description**: FS Adjustment of \$_____.
- Click the **Next >** button .

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Advanced Task Wizard

a. Step 1 Step 2 Step 3 Step 4 Step 5 

Task Type*: Miscellaneous Task 

Name*:

Grant*: Select Grant 

Stage*: Select Stage 

Task Scoring Rubric: None 

Task Description:

Next **Cancel**

b. Step 2

- Task Options**
 - Approval**
 - Standard**
- Click the *Next >* button .

Advanced Task Wizard

b. Step 1 Step 2 Step 3 Step 4 Step 5 

Task Options

Approval

Standard
'Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.

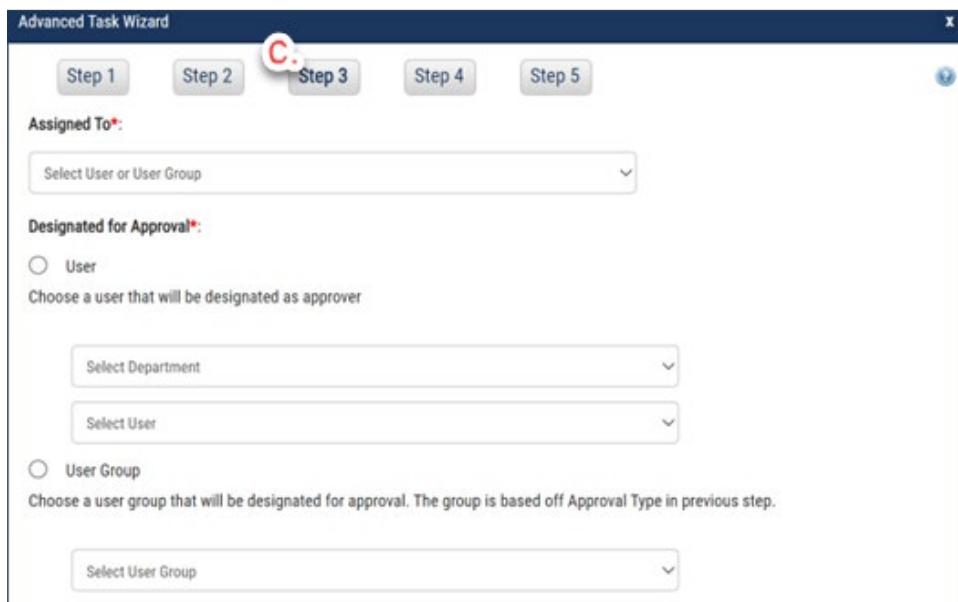
Sequential
'Sequential' approvals are those that require each approval group member to approve in a specific order, one after another.

Required
The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

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c. Step 3

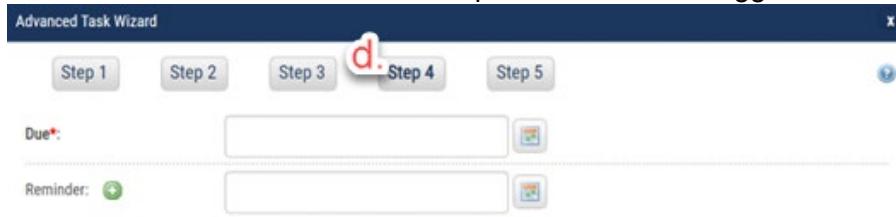
- **Assigned To*:**
 - Utilize the dropdown to assign to one of the *Project Team Members* or *User Groups*.
- **Designated for Approval*:**
 - *User Group*
 - Utilize the dropdown to select **SBA Budget – [Agency acronym]**
- Click the *Next >* button 



The screenshot shows the 'Advanced Task Wizard' window with 'Step 3' highlighted. The 'Assigned To*' section contains a dropdown labeled 'Select User or User Group'. The 'Designated for Approval*' section has two radio button options: 'User' (selected) and 'User Group'. Below 'User' is the instruction 'Choose a user that will be designated as approver' with dropdowns for 'Select Department' and 'Select User'. Below 'User Group' is the instruction 'Choose a user group that will be designated for approval. The group is based off Approval Type in previous step.' with a 'Select User Group' dropdown.

d. Step 4

- **Due*:** Enter a due date for this specific task. SBA suggests one week.



The screenshot shows the 'Advanced Task Wizard' window with 'Step 4' highlighted. The 'Due*' section has a date input field and a calendar icon. The 'Reminder:' section has a date input field and a calendar icon.

- Click the *Next >* button 

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e. **Step 5**

- **Task Recurrence:** Select the frequency in which this task will occur.
 - *Task does not repeat.*

f. Then click the **Save button** **Save** to create the task.



NOTE: Task settings may be edited at any time by clicking the **Task Name** under **Pending Tasks** and accessing the **Advance Task Wizard** to update and save any of the changes to the Steps, like changing who on the Project Team is "Assigned To" send the task for approvals.

For the second FS Adjustment task, follow the steps above with the following changes:

SBA Finance Approval Task

- a) Task Name: **2. SBA Finance - FS Adjustment**
- b) Assigned to: Appropriate member of the **Project Team**
- c) Designated for Approval: **User Group: SBA Finance**
- d) Attachments: an updated Funding Source Request Form & the Grant Award.
- e) Notes: describe what is being requested & the reason for the request.