

Grant Seeker Post-Award: Amendment Funding Source Adjustment Tasks

Grants Management Guide - State of Indiana


Version 2 (November 2025)

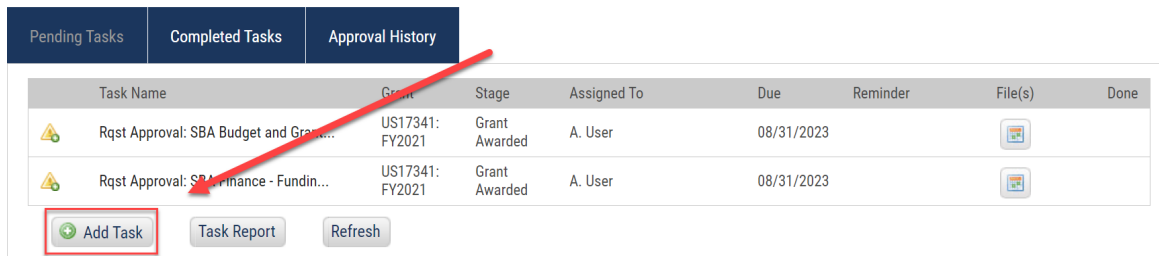
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Objective: Agencies understand how to create a Funding Source Adjustment Task.




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.

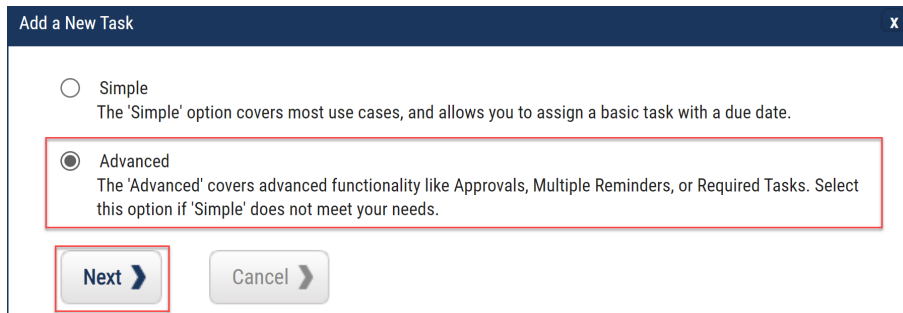
- 1) On the **Project Dashboard** page click + *Add Task button* .



Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Rqst Approval: SBA Budget and Grant...	US17341: FY2021	Grant Awarded	A. User	08/31/2023			
Rqst Approval: SBA Finance - Fundin...	US17341: FY2021	Grant Awarded	A. User	08/31/2023			



  

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




☐ Simple
The 'Simple' option covers most use cases, and allows you to assign a basic task with a due date.

☒ Advanced
The 'Advanced' covers advanced functionality like Approvals, Multiple Reminders, or Required Tasks. Select this option if 'Simple' does not meet your needs.

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

a. **Step 1**

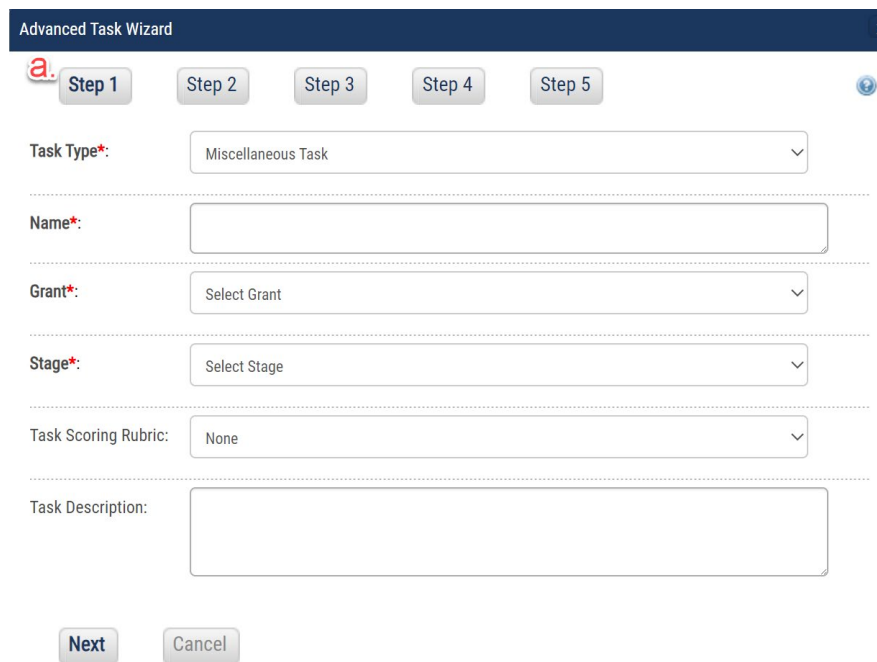
- **Task Type*:** Miscellaneous Task
- **Name*:** 1. SBA Analyst - FS Adjustment
- **Grant*:** Select the grant to which the task applies.
- **Stage*:** Grant Awarded Stage
- **Task Scoring Rubric:** None.
- **Task Description:** FS Adjustment of \$_____.
- Click the *Next > button* .

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The screenshot shows the 'Advanced Task Wizard' window at Step 1. The window has a dark blue header with the title and a close button. Below the header is a progress bar with five steps: Step 1 (active, highlighted with a red 'a'), Step 2, Step 3, Step 4, and Step 5. The main area contains several form fields: 'Task Type*' with a dropdown menu showing 'Miscellaneous Task'; 'Name*' with a text input field; 'Grant*' with a dropdown menu showing 'Select Grant'; 'Stage*' with a dropdown menu showing 'Select Stage'; 'Task Scoring Rubric' with a dropdown menu showing 'None'; and 'Task Description' with a large text area. At the bottom are 'Next' and 'Cancel' buttons.

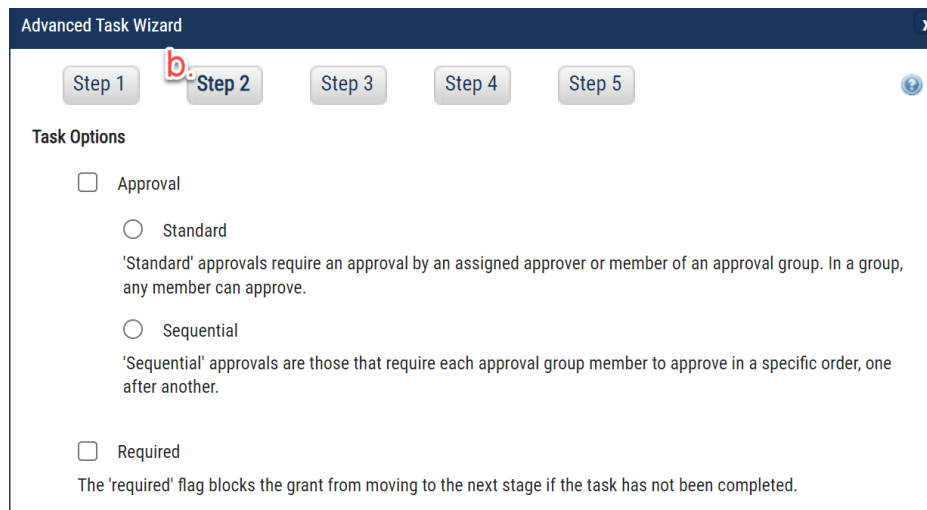
b. Step 2

- **Task Options**

- **Approval**


- *Standard*

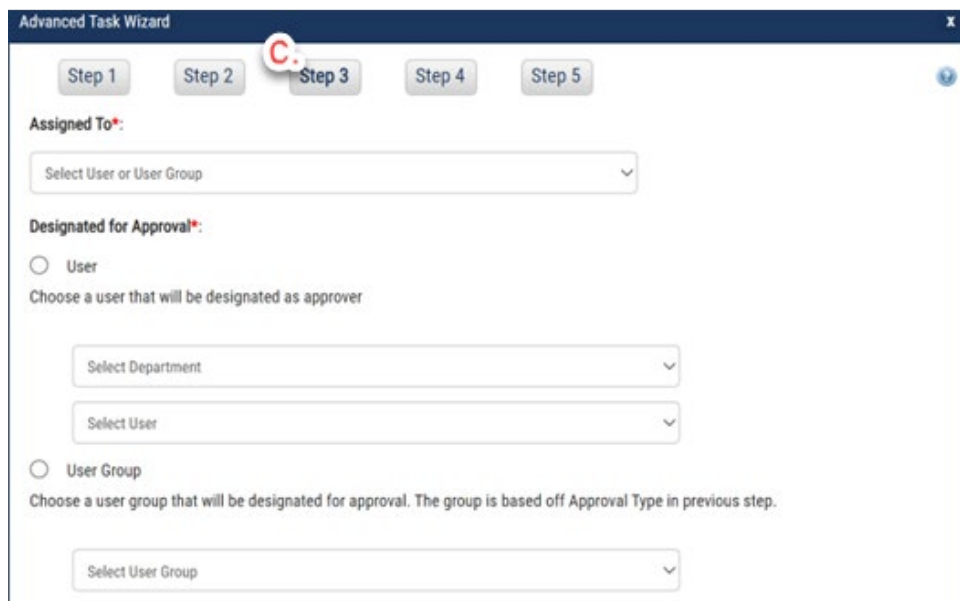
- Click the *Next > button* .



The screenshot shows the 'Advanced Task Wizard' window at Step 2. The window has a dark blue header with the title and a close button. Below the header is a progress bar with five steps: Step 1, Step 2 (active, highlighted with a red 'b'), Step 3, Step 4, and Step 5. The main area is titled 'Task Options' and contains three sections: 'Approval' with radio buttons for 'Standard' and 'Sequential'; 'Required' with a checkbox. Below the 'Standard' radio button is a text description: 'Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve. Below the 'Sequential' radio button is a text description: 'Sequential' approvals are those that require each approval group member to approve in a specific order, one after another. Below the 'Required' checkbox is a text description: The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

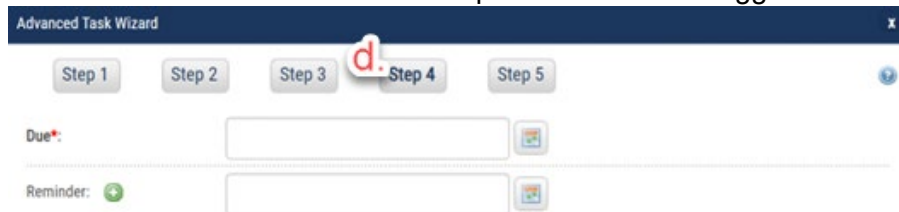
c. Step 3

- **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* .



d. Step 4

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



- Click the *Next > button* .

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.

The screenshot shows the 'Advanced Task Wizard' window with a dark blue header and a close button (X). Below the header are five step buttons: 'Step 1', 'Step 2', 'Step 3', 'Step 4', and 'Step 5'. 'Step 5' is the active step. Under 'Task Recurrence', there are two radio button options: 'Task does not repeat' (which is selected) and 'Task repeats'. At the bottom, there are three buttons: 'Previous', 'Save' (which is highlighted with a red rectangular box), and 'Cancel'.

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.