

## Quick Sheet: Carryover Request

**Audience:** Program Office

### PURPOSE

This Quick Sheet provides step-by-step instructions for processing a Federal-Initiated Carryover Request Amendment. When processing a grantee submitted amendment, begin with step 17: Verify Completion.




**Note:** Amendment names and workflow steps may vary by Partner agency. Please refer to an agency's Amendment Workflow document.

### STEPS

1. Log into the GrantSolutions Grants Management Module ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. The "Grants List" screen appears. Enter **search criteria** in the Simple or Advanced search fields and click the **Search** icon (magnifying glass).
3. The screen refreshes and matching results display in a table below the search fields. Locate the desired grant. From the *Actions* column, click the **Manage Amendments** icon.




**Grants List** [Advanced Search](#)

Grant Number or FAIN

Organization    

Search within results

1 - 12 of 12 items 50 | 100 | 150 | 200 | 1000

<input type="checkbox"/>	Program Office	Grant Program	1	Grant Number	2	Organization	Project Period Start Date	3	Project Period End Date	Project Status	Actions
<input type="checkbox"/>	Office	Initiative		102		University	09/01/2014		08/31/2019	Received (Post Award Paper Submission)	  

4. The "Manage Amendments" screen appears. Click the **New** button.

**Manage Amendments**

Grant Number 102

Grantee Name University

Project Title

Project Start Date 09/01/2014

Project End Date 08/31/2019

Last Issued NGA 01/26/2018 ([View NGA](#))

Amendment #	Status	Submitted Date	Type	Budget Period	Funds Requested	Funds Approved	Funding Memo Required	Action
(To be assigned)	Received (Post Award Paper Submission)		Extension Without Funds	4 09/01/2017 - 08/31/2018	N/A	N/A	Funding Memo Status No N/A	<a href="#">Edit Amendments</a> <a href="#">Delete Amendment</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a> <a href="#">Set Budget Period</a>

5. The “Select Amendment Type” screen appears. Select the **Carryover Request** radio button. At the bottom of the screen, click the **Create Amendment** button.

**Select Amendment Type**

Grant Number:


Project Period:  to

Budget Period:  to

Amendment Type:

- ☐ Balance of Funds (Type 6)
- ☐ Budget Revision (Type 6)
- ☐ Budget Revision (Type 3)
- ☒ Carryover Request (Type 6)
- ☐ Change Grantee Address (Type 6)
- ☐ Change in PI/PO (Type 6)
- ☐ Change in Grantee Authorizing Official (Type 6)
- ☐ Closeout by Budget Period (Type 6)
- ☐ Disbursement (Type 8)
- ☐ EIN Change (Deobligate) (Type 6)
- ☐ EIN Change (Reobligate) (Type 6)
- ☐ Grant Closeout Action (Type 6)
- ☐ Mandatory Grant Project Extension (Type 6)
- ☐ NGA Revision (Type 6)
- ☐ Name change (Type 6)
- ☐ No Cost Extension (Type 6)
- ☐ Revision & Extension (Type 6)
- ☐ Supplement (Type 6)
- ☐ Supplement & Extension (Type 6)
- ☐ Supplement & Revision (Type 6)

6. The “GrantSolutions Amendment Application Control Checklist” screen appears. Locate the **SF-424A Budget Information** line in the **Online Forms** section. From the **Enclosure(s)** column, click the **Enter Online** link.

Information for the Applicant	Enclosure(s)	Attachment(s)	Status
Carryover Request Instructions ACF	<a href="#">View PDF</a> <a href="#">View Original Version</a>	N/A	<input type="checkbox"/>
SF-425 Download	<a href="#">View Web Page</a>	N/A	<input type="checkbox"/>
<b>Online Forms</b>	<b>Enclosure(s)</b>	<b>Attachment(s)</b>	<b>Status</b>
SF-424A Budget Information - Non-Construction	<a href="#">Enter Online</a> <a href="#">Enter Comments</a>	0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	
SF-424 Application for Federal Assistance Version 2	<a href="#">Enter Online</a>	0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	<input type="checkbox"/>
<b>Additional Information to be Submitted</b>	<b>Enclosure(s)</b>	<b>Attachment(s)</b>	<b>Status</b>
Cover Letter Upload		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	<input type="checkbox"/>
Budget Narrative Upload		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	<input type="checkbox"/>
SF-425 Upload		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	<input type="checkbox"/>
Miscellaneous Information		0 <a href="#">Uploaded Files</a> 0 <a href="#">Mail-in Items</a>	<input type="checkbox"/>

7. The "SF-424A" screen appears. In the *Estimated Unobligated Funds* column of *Section A: Budget Summary*, enter the **total amount** of the Carryover Request in the *Federal (C)* field.
8. In the *New or Revised Budget* column of *Section A: Budget Summary*, enter the **total amount** of the Carryover Request in the *Federal (E)* field.

**SF-424A**

OMB Number 4545-00  
Expiration Date 06/30/22

BUDGET INFORMATION - NON CONSTRUCTION PROGRAMS

\* indicates a required field

Organization Name: \_\_\_\_\_ Project Title: \_\_\_\_\_ Budget Period:

Application Number: \_\_\_\_\_ Project Period: \_\_\_\_\_ Start Date: 09/30/2011 End Date: 09/29/2012

(To be assigned) 09/30/2010 to 09/29/2013

[SF-424 Instructions](#)

**Section A: Budget Summary**

Grant Program Function or Activity (A)	Catalog of Federal Domestic Assistance Number (B)	Estimated Unobligated Funds		New or Revised Budget		Total (G)
		Federal (C)	Non-Federal (D)	Federal (E)	Non-Federal (F)	
1. FD - State Child Support	93.554 - Child Support En	\$ 100,000.00	\$ 0.00	\$ 100,000.00	\$ 0.00	\$100,000.00
2. FD - State Child Support	Please select a CFDA	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
3. FD - State Child Support	Please select a CFDA	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
4. FD - State Child Support	Please select a CFDA	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00

9. In *Section B: Budget Categories*, enter the **Object Class Category** amounts as they appear on the Grant Recipient's SF-424A.

**Section B: Budget Categories**

6. Object Class Categories

	(1) FD - State Child Support Enforcement Agencies Demonstration	(2) FD - State Child Support Enforcement Agencies Demonstration	(3) FD - State Child Support Enforcement Agencies Demonstration	(4) FD - State Child Support Enforcement Agencies Demonstration	Total (5)
(a) Personnel	\$ 10,000.00	\$ 0.00	\$ 0.00	\$ 0.00	\$10,000.00
(b) Fringe Benefits	\$ 40,000.00	\$ 0.00	\$ 0.00	\$ 0.00	\$40,000.00
(c) Travel	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
(d) Equipment	\$ 30,000.00	\$ 0.00	\$ 0.00	\$ 0.00	\$30,000.00
(e) Supplies	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
(f) Contractual	\$ 20,000.00	\$ 0.00	\$ 0.00	\$ 0.00	\$20,000.00
(g) Construction	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
(h) Other	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
(i) Total Direct Charges (sum of 6a - 6h)	\$100,000.00	\$0.00	\$0.00	\$0.00	\$100,000.00
(j) Indirect Charges	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00
(k) Totals (sum of 6i and 6j)	\$100,000.00	\$0.00	\$0.00	\$0.00	\$100,000.00
7. Program Income	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$0.00


10. At the bottom of the screen, click the **Save** button.

11. A confirmation message appears with the text, “Would you like to transfer your budget totals information to the SF-424 form?” Click the **Yes** button to continue.

**Confirmation**

Would you like to transfer your budget totals information to the SF-424 form ?

12. If there are no errors, a “Save Successful” message appears below the Save and Close buttons.


**Save Successful**

13. To return to the “GrantSolutions Amendment Application Control Checklist” screen, click the **Close** button.

14. The “GrantSolutions Amendment Application Control Checklist” screen appears. Scroll to the bottom and click the **Verify Submission** button.

**Amendment Package Status:** Received (Post Award Paper Submission)

15. The “GrantSolutions Amendment Submission Verification” screen appears. Click the **Final Submission** button.

**GrantSolutions Amendment Submission Verification**

You are about to submit the following application:

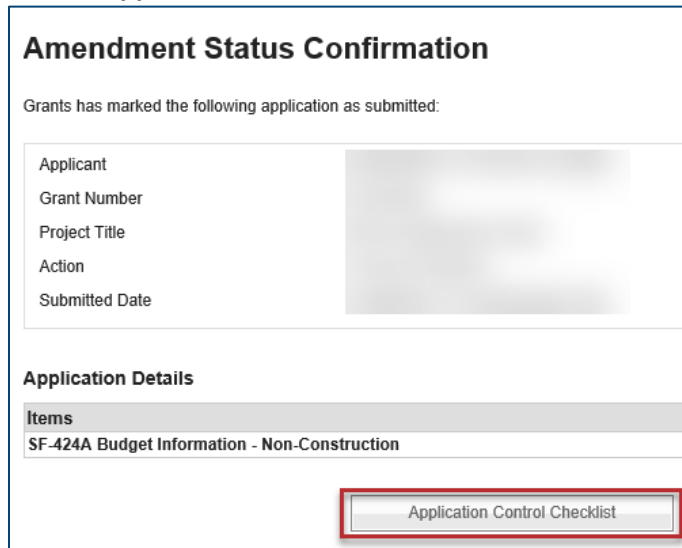
Applicant	
Grant Number	
Project Title	
Action	Carryover Request

**Online Forms**

SF-424A Budget Information - Non-Construction

The grantee can view this amendment submission. ☐ Yes ☒ No

16. The “Amendment Status Confirmation” screen appears. Below the *Application Details* section, click the **Application Control Checklist** button.



**Amendment Status Confirmation**

Grants has marked the following application as submitted:

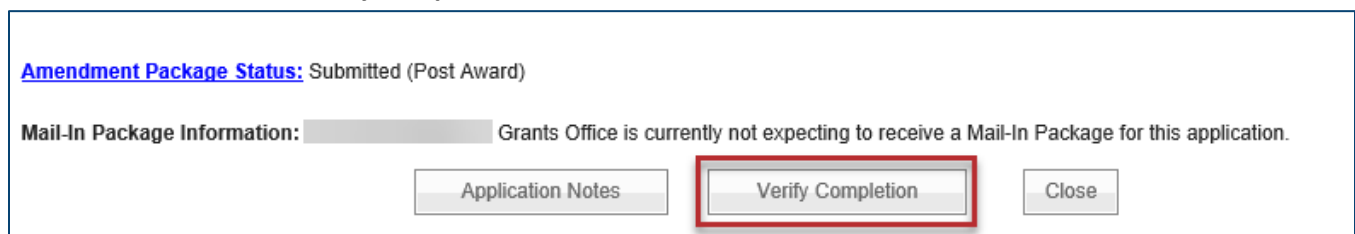
Applicant	
Grant Number	
Project Title	
Action	
Submitted Date	

**Application Details**

Items
SF-424A Budget Information - Non-Construction

**Application Control Checklist**

17. The “GrantSolutions Amendment Application Control Checklist” screen appears. At the bottom of the screen, click the **Verify Completion** button.

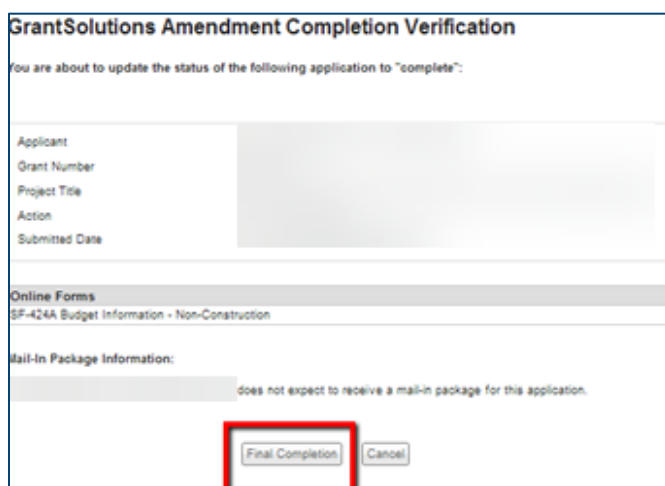


**Amendment Package Status:** Submitted (Post Award)

**Mail-In Package Information:** Grants Office is currently not expecting to receive a Mail-In Package for this application.

**Application Notes** **Verify Completion** **Close**

18. The “GrantSolutions Amendment Completion Verification” screen appears. Click the **Final Completion** button.



**GrantSolutions Amendment Completion Verification**

You are about to update the status of the following application to “complete”:

Applicant	
Grant Number	
Project Title	
Action	
Submitted Date	

**Online Forms**

SF-424A Budget Information - Non-Construction
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**Mail-In Package Information:** does not expect to receive a mail-in package for this application.

**Final Completion** **Cancel**

19. The “Amendment Status Confirmation” screen appears. Below the *Application Details* section, click the **Application Control Checklist** button.

## Amendment Status Confirmation

Grants has marked the following application as "Complete (Post Award)"....

Applicant	
Grant Number	
Project Title	
Action	
Submitted Date	

### Application Details

Items
SF-424A Budget Information - Non-Construction

Application Control Checklist

20. The “GrantSolutions Amendment Application Control Checklist” screen appears. At the bottom of the screen, click the **Close** button.

21. The “Manage Amendments” screen appears. From the *Action* column, click the **Funding Memo** link.

Complete (Post Award)	07/17/2013 03:39:57 PM	Carryover Request	2 09/30/2011 - 09/29/2012	N/A	N/A	Yes	<a href="#">View Amendment</a> <a href="#">Disapproval</a> <a href="#">Funding Memo</a> <a href="#">Budget Worksheet</a> <a href="#">Grant Notes</a> <a href="#">History</a> <a href="#">Send Message</a>
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22. The “Funding Memo” screen appears. From the *Action* column, click the **Create** link.

Grant Number	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
Budget Period: 1	Center	Central Office	Federal: N/A Non-Federal: N/A	Not Started Federal: \$0.00 Non-Federal: \$0.00	Categories: Cultural Preservation- Intergenerational Learning Communities -	<a href="#">Create</a> <a href="#">Set Budget Period</a> <a href="#">Grant Notes</a> <a href="#">Manage Project Abstract</a>

23. The “Prior Approval and Funding Memo” screen appears. Ensure all amounts in the *Recommended Funding* section are \$0.00.

	Federal Amount	Non-Federal Amount	Total Amount	Purpose
Basic Operations	0.00	0.00	\$0.00	
Special Projects	0.00	0.00	\$0.00	
Other Special Projects	0.00	0.00	\$0.00	
Other Projects	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
Other	0.00	0.00	\$0.00	
TOTAL	\$0.00	\$0.00	\$0.00	

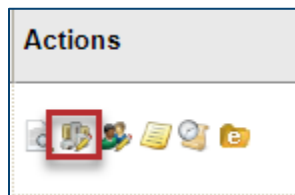
IF THE AMOUNT SHOWN ABOVE INCLUDES FUNDING FOR SPECIAL INITIATIVES OR UOB, SHOW AWARD COMPUTATION UNDER OTHER REMARKS SECTION OF THIS DOCUMENT

UNOBIGATED BALANCE OF FEDERAL FUNDS 0.00

24. At the bottom of the screen, click the **Save** button.

25. The “Funding Memo” screen reappears. Below the search fields, click the **Close** button to return to the “Grants List” screen.

26. The “Grants List” screen appears. If necessary, enter **search criteria** to locate the grant. From the *Actions* column of the results table, click the **Manage Amendments** icon.



27. The “Manage Amendments” screen appears. From the *Action* column, click the **Budget Worksheet** link.

Complete (Post Award)	07/17/2013 03:39:57 PM	Carryover Request	2 09/30/2011 - 09/29/2012	N/A	N/A	Yes N/A	<a href="#">View Amendment</a> <a href="#">Disapproval</a> <a href="#">Funding Memo</a> <a href="#">Set Budget Period</a> <a href="#">Budget Worksheet</a> <a href="#">Scenarios</a> <a href="#">History</a> <a href="#">Send Message</a>
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28. The “Budget Worksheet” screen appears. From the *Totals* tab, scroll to the *Final Budget Totals* section.

**Note:** The *Unobligated Funds – Reprogram* field should equal the total amount of the Carryover Request. The *Total this Action* field should equal \$0.00, as this is a non-monetary action.

Final Budget Totals	
Total Budget	150,237.00
Non-Federal (May Include Program Income)	0
Federal	150,237.00
Unobligated Funds - Reprogram	100,000.00
Unobligated Funds Offset	0.00
In Kind Contribution	0.00
Program Income	0.00
Previous Award (Doesn't Include Non-Federal)	50,237.00
Total This Action	0.00

Fed Negotiator	
Grantee Negotiator	
Start By:	SMadarani 07/17/2013 03:58:42 PM
Last Update By:	SMadarani 07/17/2013 04:16:51 PM

Save Successful

Save Save and Verify Close

29. At the top of the Budget Worksheet, select the second **tab**.

Current Scenario: Initial (This is the Active Scenario)

Add Activity

Delete Activity

Select an Activity ▼

Rename Activity

Select an Activity ▼

Create New Scenario

Reset

Delete Current Scenario

Load Scenario

Select Scenario ▼

Totals

Adjustments



30. In the *Unobligated Balance* column, enter the **total Carryover amount** in the itemized cost categories, just as the Grant Recipient entered on the SF-424A.

Category	Previous Budget	Unobligated Funds	Unobligated Funds	Unobligated Funds	Unobligated Funds	Unobligated Funds	Unobligated Funds
Personnel	4,400.00	10,000.00	0.00	10,000.00	14,400.00	14,400.00	0.00
Fringe Benefits	2,554.00	40,000.00	0.00	40,000.00	42,554.00	42,554.00	0.00
Travel	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Equipment	0.00	50,000.00	0.00	50,000.00	50,000.00	50,000.00	0.00
Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Contractual	27,654.00	100,000.00	0.00	100,000.00	127,654.00	127,654.00	0.00
Participant Contribution	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other	15,188.00	0.00	0.00	0.00	15,188.00	15,188.00	0.00
Travel Per Diem	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Utilities and Maintenance	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commodities	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Participant Care	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Outpatient Care	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel Related Supplies	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel Stipends	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Travel Tuition and Fees	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Direct	47,746.00	100,000.00	0.00	100,000.00	147,746.00	147,746.00	0.00
Indirect (%)	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Totals	47,746.00	100,000.00	0.00	100,000.00	147,746.00	147,746.00	0.00

31. When all values are entered, click the **Save** button at the bottom of the screen.

32. Toward the top of the Budget Worksheet, select the **Totals** tab. Scroll to the *Final Budget Totals* section.

33. Verify that the *Unobligated Funds – Reprogram* row now equals the **total amount** of the Carryover Request.

34. Verify that the *Total this Action* row equals **\$0.00**.

Final Budget Totals	
Total Budget	150,237.00
Non-Federal (May Include Program Income)	0
Federal	150,237.00
Unobligated Funds - Reprogram	100,000.00
Unobligated Funds Offset	0.00
In Kind Contribution	0.00
Program Income	0.00
Previous Award (Doesn't include Non-Federal)	50,237.00
Total This Action	0.00

Fed Negotiator	
Grantee Negotiator	
Start By:	SMadarani 07/17/2013 03:58:42 PM
Last Update By:	SMadarani 07/17/2013 04:16:51 PM

Save Successful

35. At the bottom of the screen, click the **Save and Verify** button.

36. Click the **Close** button.

Buttons: Save, **Save and Verify**, Close

37. The “Manage Amendments” screen appears. From the *Action* column, click the **Funding Memo** link.

Links in Action column: **Funding Memo**, Budget Worksheet, Grant Notes, History, Send Message

38. The “Funding Memo” screen appears. From the *Action* column, click the **Recommend** link.

Total Records Count: 1

Select	Application Number / Application Type	Grant Number / Budget Period	Applicant/Grantee	Service Area	Funding List Amount	Memo Status	Categories/Locale	Action
<input type="checkbox"/>	(Amendment: Carryover Request)	Budget Period:		Office Program	Federal: N/A Non-Federal: N/A	Draft Federal: \$0.00 Non-Federal: \$0.00		<a href="#">Delete</a> <a href="#">Edit</a> <a href="#">History</a> <a href="#">Set Budget Period</a> <a href="#">View</a> <a href="#">Grant Notes</a> <a href="#">Manage Project Abstract</a> <a href="#">Project Assignments</a> <a href="#">Budget Worksheet</a> <b><a href="#">Recommend</a></b>

39. The “Action Requested: Recommend” screen opens in a new window. Enter optional comments and click the **OK** button.

Application Number / Application Type: Amendment: Carryover Request

Grant Number:

Applicant/Grantee:

**Action Requested :Recommend**

Add Comments

Comments: Recommends Carryover Request

**OK** Cancel

40. The “Funding Memo” screen reappears, and the process is complete.