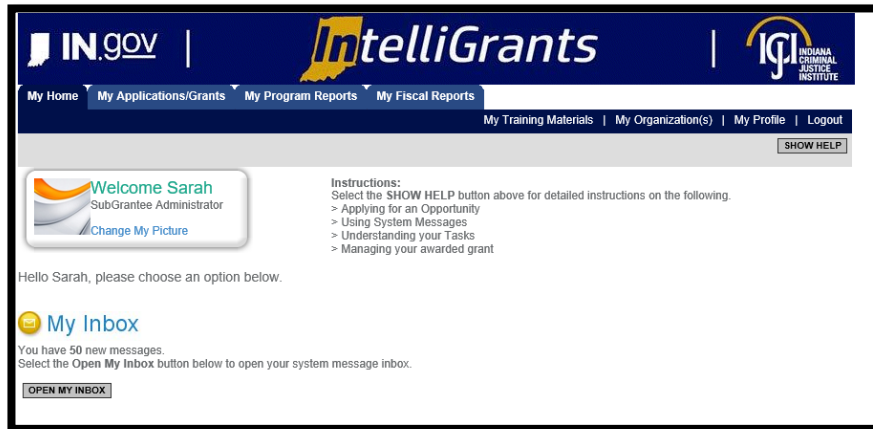# How to Complete a Program Modification Request (PMR)
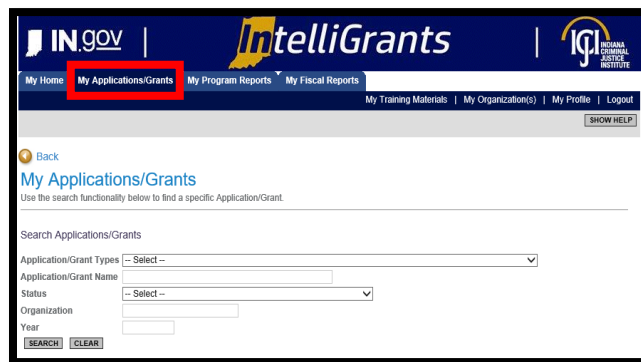
Once logged into IntelliGrants, you should see the following screen

   If you are having issues contact your Grant Manager for assistance

Then there are two ways to access your grant:

#1 – Navigating to "***My Applications/Grants"*** (tab at the top of screen)

    a. Once you have clicked on ***"My Applications/Grants"*** then utilize the search fields to find a particular grant.
        a. You can search by specific Application or the Grant Name or if nothing is filled out you can search through all grants your agency has ever had/applied for in IntelliGrants.
        b. SUGGESTION**:** Clear out all of the fields first by clicking on the **CLEAR** button. Otherwise, IntelliGrants will keep the results of your last search in the fields.
        c. Example: I cleared out the search fields, then typed in the grant I wanted to review.
    b. Click **SEARCH**.
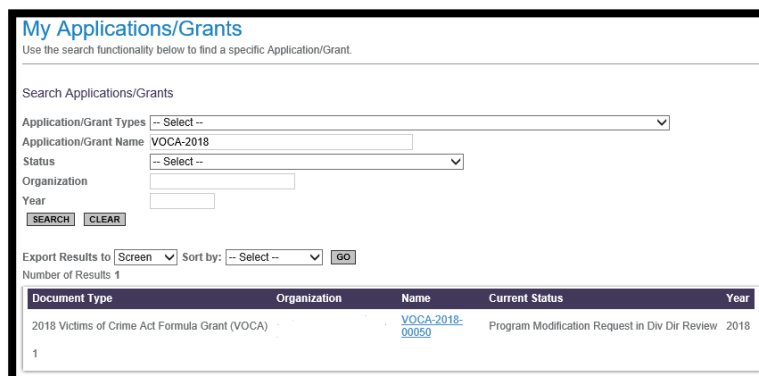
    c. To review the grant, Click on the **Grant Name**.
        a. This will take you to the **Document Snapshot Page** of that specific grant.

How to Complete a Program Modification Request (PMR)

#2 – Utilizing the *"My Organization"* feature (right side of screen)

a. Once you have selected *"My Organization"* then you should see your agency's information populate.
b. To navigate to a particular grant select "Organization Documents".
   a. This will pull up all the documents that your organization has initiated in IntelliGrants.
c. Select the name of the grant.
   a. Once you click on the Grant name it will take you to that Grant's "Document Snapshot" page.

Once you reach the Document Snapshot page, follow the instructions below on how to submit a Program Modification Request (PMR)

b. HELPFUL TIPS:
   i. Only the **Subgrantee Administrator and Subgrantee Project Director** can initiate a Program Modification Request.
   ii. Grant must be in the *Grant Executed* status
       1. You can check the status of a particular grant by clicking on "Details" and look under the "Current Status" column.
       2. If you have a Fiscal or Program Report in process (initiated or submitted) and attempt to initiate a PMR, you will be given an error message stating that your report must first be approved.
          a. Check with your Grant Manager if you have questions on how to proceed.

How to Complete a Program Modification Request (PMR)

1. Navigate to the Status Changes link (near the top middle area of screen) – hover over the link and you will see the following two options:
   a. Select **APPLY STATUS** under *Program Modification Request in Process*.
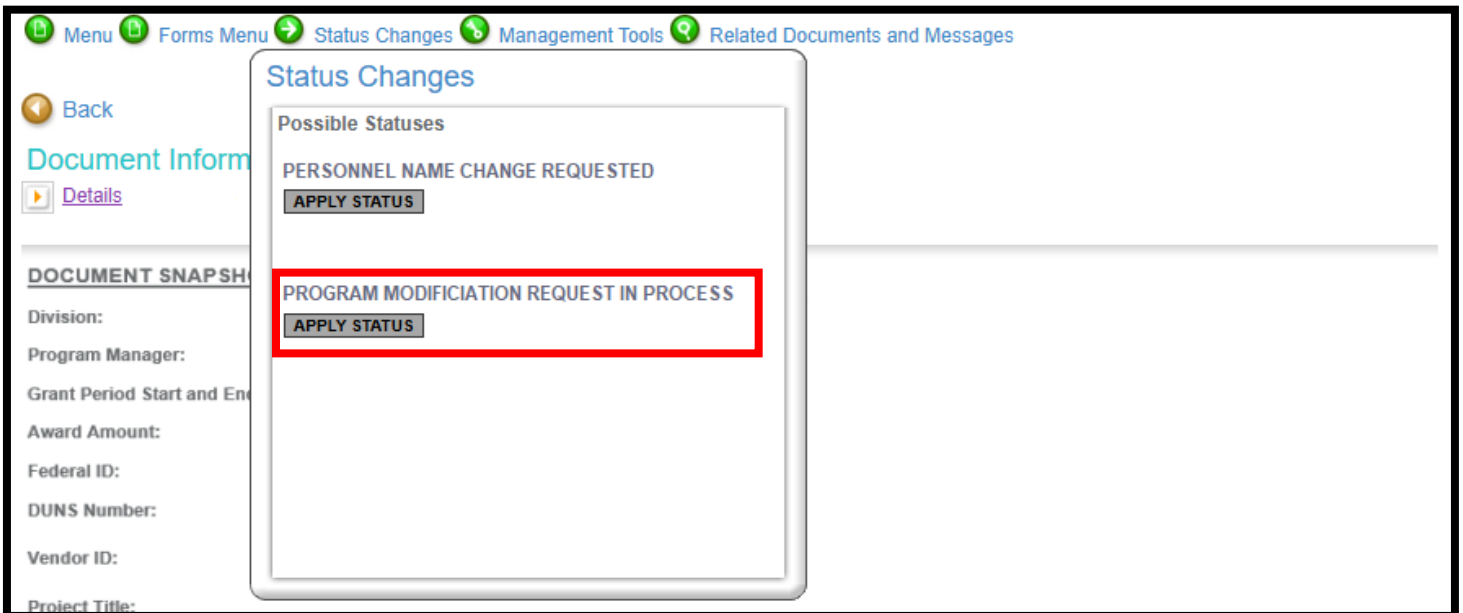
2. After clicking Apply Status your grant will be moved from the *Grant Executed* status to *Program Modification Request in Process* status.
3. Next, Hover over the Forms Menu
4. Scroll down until you see Program Modification Request
5. Click on Program Modification Request
   a. **If this is not your first PMR, there will be a number (2, 3, 4, etc) you will need to click on the most recent number to edit the form.**
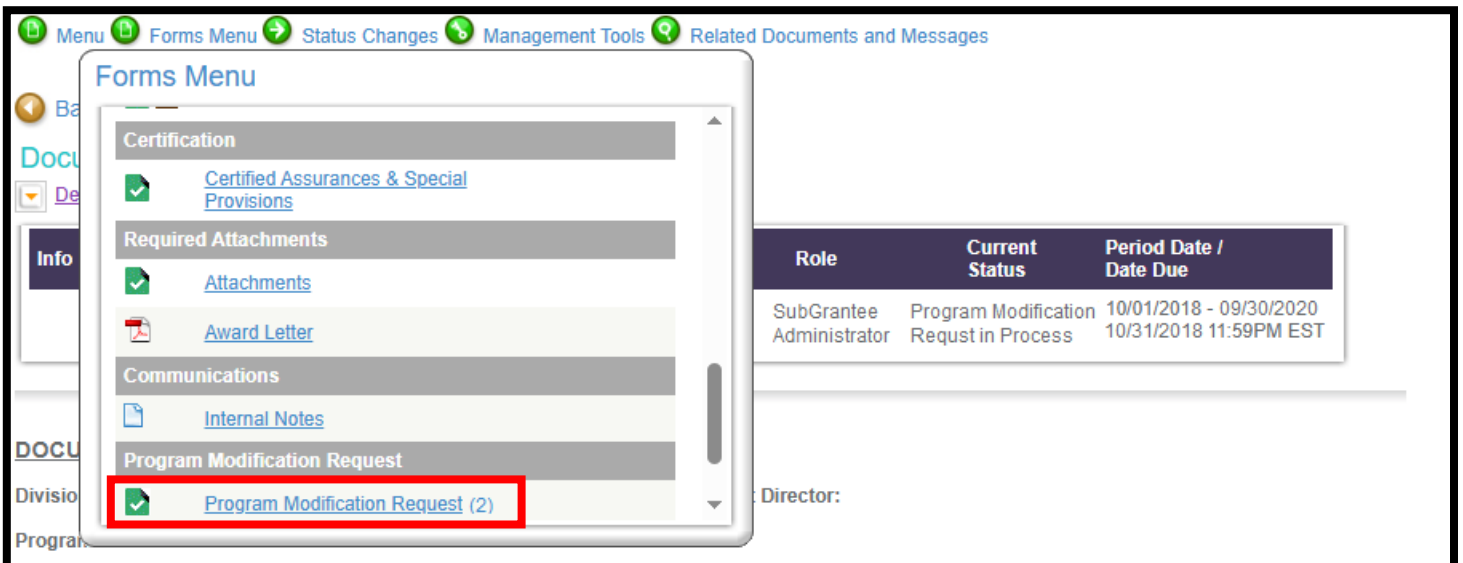
How to Complete a Program Modification Request (PMR)

6. Complete the Program Modification Request Form
    a. Select the **Budget Revision** or **Change of Scope** checkbox(s)
        i. You can select both if you want to revise the Budget and have a Scope Change
    b. Select any other corresponding boxes for the pages that you want to update
        i. Please note that if you do not select the checkbox for a category you will not have the ability to modify that page during the PMR process.
    c. A Justification text box will appear above the attachment area
        i. If you select both Budget Revision and Change of Scope you will have two text boxes populate that will need to be completed
            1. Each text box is limited to 4000 characters and must explain your requested changes, if you run out of character space you can add an attachment explaining the rest of your requested changes
        ii. Explain all of your requested changes in as much detail as possible for what you are wanting to modify.
            1. If you are requesting to add a new expense: detail where the funds to pay for the expense previously came from and why those funds are no longer available.
            2. If you are reallocating funds: explain where you are moving funds from in the budget and where to and why.
            3. If a Goal/Objective/Outcome no longer works for your program or is unobtainable explain in detail why that no longer works and what you would like to do instead
            4. If we have notified you that your grant period has been extended you will need to check the *Extension of Grant Terms* box and add in the new end date provided
            5. Anything that will help explain or support your justification request should also be attached. Examples of attachments can include (but are not limited to):
                a. The rest of your justification if you ran out of character space
                b. Job Descriptions for new position(s), change in position name, or change in job roles/duties
                c. Explanation of budget changes
                d. Rental Lease, Contract/MOU, Equipment Quotes, Travel Agenda, etc.

PROGRAM MODIFICATION REQUEST

- All required fields are marked with an *.
- Use the **SAVE** button to save information and calculate data on each page.
- Save at least every 30 minutes to avoid losing data.
- To proceed to the next page, you may use the **SAVE/NEXT or NEXT** buttons above.
- To return to the Forms menu, click the Forms Menu link above.

Identify Program Modification Request purpose by checking one or more boxes.*

☐ Budget Revision
   ☐ Personnel
   ☐ Employee Benefits
   ☐ Travel (Including Training)
   ☐ Equipment
   ☐ Supplies & Operating Expenses
   ☐ Consultants and Contractors
   ☐ Consultants Travel

☐ Extension of Grant Term   Proposed Extension Date: [_____]

☐ Change of Scope
A modification that alters the scope of a project may include, but is not limited to, the following changes the purpose, major programmatic activities, project location, certain budgetary changes, and/or duration.
   ☐ Programmatic Information
   ☐ Problem Statement & Analysis
   ☐ Goals, Objectives & Outcomes
   ☐ Program Description
   ☐ Evidence Based - Best Practices
   ☐ Use of Volunteers

Form/Document Upload(s) Use this section if providing additional justification or documents for the above request(s).

Attachment Description: [_____]   [Choose File] No file chosen

How to Complete a Program Modification Request (PMR)

7. Once you have completely filled out the Request form, click **SAVE** (near the top of the page).
   a. This page will then refresh after you click SAVE, showing a green stoplight

| SAVE | SAVE/NEXT | NEXT | PRINT VERSION | CHECK GLOBAL ERRORS | SHOW HELP |

Menu Forms Menu Status Changes Management Tools Related Documents and Messages
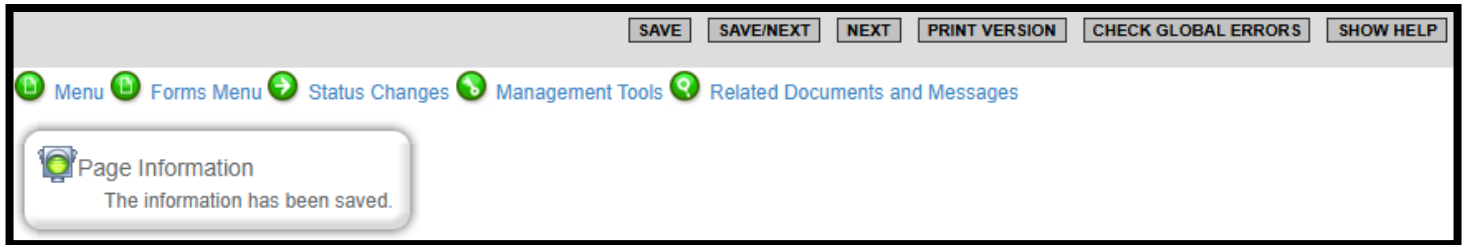
Page Information
    The information has been saved.

8. Once your changes have been saved, Hover over the **STATUS CHANGES** menu
   a. Click **APPLY STATUS** or **SUBMIT** under *Program Modification Request Submitted*.

| SAVE | SAVE/NEXT | NEXT | PRINT VERSION | CHECK GLOBAL ERRORS | SHOW HELP |

Menu Forms Menu Status Changes Management Tools Related Documents and Messages

Back

Document Inform

Status Changes

Details

Possible Statuses

You are here: > 2024

PROGRAM MODIFICIATION REQUEST IN SUBMITTED

APPLY STATUS

PROGRAM MODIFIC

- All required fields a
- Use the **SAVE** butt
- Save at least every
- To proceed to the r
- To return to the Fo

Identify Program Modific

☐ Budget Revision
    ☐ Personnel

9. You typically will receive an email from IntelliGrants stating that your request has been submitted

Program Modification Request Submitted

INGRTDoNotReply@intelligrants.com
To: Wed 7/24/2019 5:11 PM

**** This is an EXTERNAL email. Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email. ****

Jul 24, 2019

The Indiana Criminal Justice Institute has successfully received your 2018 program modification request VOCA-2018-00050 for 2018 Victims of Crime Act Formula Grant (VOCA).

↩ Reply   ↩ Reply all   ↪ Forward

How to Complete a Program Modification Request (PMR)

10. Once submitted, your assigned Grant Manager will then review your Justification Request.
    a. Your request will either be returned for additional explanation, approved, or denied.
        i. If denied: you would receive an email from your grant manager explaining why
        ii. If returned: you will receive an email notification from IntelliGrants explaining any additional information that is needed before being able to approve or deny it
        iii. If approved you will receive an email notification from IntelliGrants
            1. This email is to notify you that your justification was approved, and you can now go in and make the requested changes
                a. If you are making changes to your budget you will also want to update the Budget Narrative page to reflect those additional expenses or changes

Program Modification Ready for Submission

INGRTDoNotReply@intelligrants.com   Fri 8/2/2019 11:53 AM
To:

**** This is an EXTERNAL email. Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email. ****

Aug 02, 2019
Mothers Against Drunk Driving
Your request to start a program modification has been reviewed and is now eligible for submission. 2018 Program Modification Request VOCA-2018-00050 for 2018 Victims of Crime Act Formula Grant (VOCA) is now ready to be modified. All changes will be reviewed by The Indiana Criminal Justice Institute. Additional approvals may be required by the Division Director and/or Board of Trustees.

Reply   Reply all   Forward

11. Once you have SAVED each page and made all of your requested changes, Hover over **STATUS CHANGES** menu and Click **APPLY STATUS** or **SUBMIT** to *Program Modification Submitted*
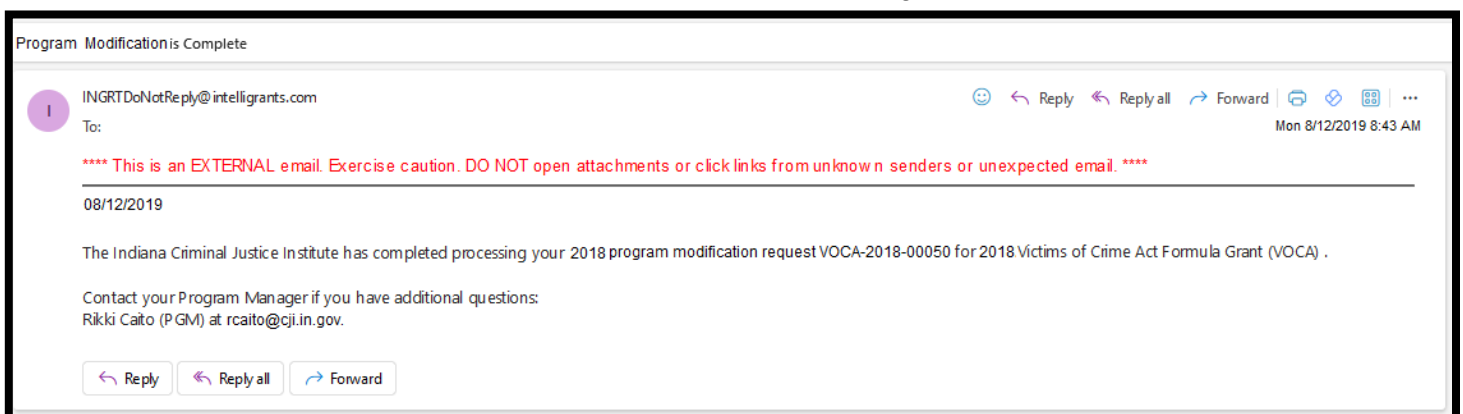   a. Once submitted, your assigned Grant Manager will then review all of your Changes compared to what you had put in your request and take the changes to the Division Director for approval
        i. Your changes will either be returned for modifications/corrections or approved
            1. If returned: you will receive an email notification from IntelliGrants explaining any additional information that is needed before being able to approve it
            2. If approved you will receive an email notification from IntelliGrants stating your PMR is complete and your grant is again executed
                a. At this time you will be able to Initiate/Submit Program/Fiscal Reports, Initiate a Personnel Name Change, or Initiate another PMR

Program Modification is Complete

INGRTDoNotReply@intelligrants.com   Reply   Reply all   Forward   Mon 8/12/2019 8:43 AM
To:

**** This is an EXTERNAL email. Exercise caution. DO NOT open attachments or click links from unknown senders or unexpected email. ****

08/12/2019

The Indiana Criminal Justice Institute has completed processing your 2018 program modification request VOCA-2018-00050 for 2018 Victims of Crime Act Formula Grant (VOCA) .

Contact your Program Manager if you have additional questions:
Rikki Caito (PGM) at rcaito@cji.in.gov.

Reply   Reply all   Forward

PLEASE SEE HELPFUL TIPS AND REMINDERS ON PAGE 7 FOR SUBMITTING A PMR

How to Complete a Program Modification Request (PMR)

<u>HELPFUL TIPS AND REMINDERS:</u>

- Your awarded amount must match the amount on your Signed Grant Agreement.
  - Refer to the Budget Summary Page to ensure your Grant funds match your Award
  - An exception to this would be if your agency was notified of being awarded additional funds for your program.
    - Your Grant Manager would work with you on this Amendment and PMR process.
- You can only move up to **10% of GRANT** funds per PMR.
  - There is no limit to how much MATCH funds you can move during a PMR
  - You are not limited to how many PMRs you can submit on a grant, however please note that it does factor into your Risk Score that is completed yearly for your agency
- PMRs initiated within the last 30 days of the grant will not be approved
  - There may occasionally be some exceptions to this rule, if you have questions reach out to your Grant Manager or the Division Director
- PMRs are not retroactive! They are effective the date you submit the justification in IntelliGrants if the justification is approved.
  - There may occasionally be some exceptions to this rule, if you are asking for the PMR to go retroactive you will need to state that information in your justification
- You can only move or update items that you mentioned in your justification
  - Other changes made will be returned to you if they were not mentioned/approved
- You cannot update Employee Name's in the budget for current expenses; this will need to be completed through a Personnel Name Change before or after the PMR
- You cannot move more than what you have expended/drawn down on a certain line item.
  - Please refer to your last submitted/approved Fiscal Report to check the remaining balance for each expense, as that is the total amount available to be moved; if wanted
  - If you do move more funds than what is available, your grant manager should catch this and return it to you for corrections
    - If it was not caught and returned for corrections, that expense line item will be negative on your next fiscal report causing errors and you will be required to complete another PMR to correct this issue.
- If you receive a Global Error – it should tell you what the error is and how to correct it
  - EX: You need to RESAVE the Budget Summary and Budget Narrative before it will allow you to submit your budget changes
- You can move funds between categories (if that was approved in your justification)
  - If you moved funds between categories in your budget, this could cause the PMR process to take a little longer than expected due to having to update your Purchase Order for the grant in the Payroll System
    - EX: You move $500 out of Personnel and into Benefits
  - If you move funds within the same categories, we would not need to update the Purchase Order associated with your grant
    - EX: You added and Overtime and On-Call line item to your budget using a vacant position's remaining funds
- If your PMR is taking a little while to be approved, you should talk with your grant manager about how to get caught up on reports after the PMR is completed. They may suggest you submit a $0 fiscal report and combine it with another report
- Please refer to ICJI's Grant Management Directives and Supporting Documentation Guidance https://www.in.gov/cji/grantee-training-and-resources/
- **If you run into any problems/issues/questions do not hesitate to reach out to your Grant Manager, who will be happy to assist you with this process!**