



Create grant maintenance records


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Add and maintain various details related to a specified grant year, ID, type, or member (county district) record. Fiscal agents can create, save, and submit budget adjustment requests, budget revision requests, and reimbursement requests. Expense accounts must exist in Finance file ID C.

Retrieve an existing grant record:

Field	Description
Year	Type a four-digit grant year. This field defaults to the current school year.
Grant ID	<p>Begin typing a grant ID or description. As you type the data, a drop-down list of corresponding data is displayed. Select a grant ID. If the grant ID or description is not known, click  to select a grant ID from the Grant IDs lookup or press the Spacebar to view a list of grant IDs.</p> <p>The grant ID autosuggest list and the Grant IDs lookup is based on the Year field. For example, if you type 2020 in the Year field and tab to the Grant ID field, only active 2020 grant IDs are displayed in the autosuggest list and in the lookup.</p>


☐ Click **Retrieve**. The grant record is displayed.

If the grant information is not known, click [Directory](#) to perform a search of all grants.

Note: If only the original transaction (first entry) exists, the **Member** (county district) and **Grant Type** fields can be edited. Once budget revision and reimbursement requests are applied to a grant ID/Year, the **Member** (county district) and **Grant Type** fields can no longer be edited.

Add a new grant record:

☐ Click **Add** to add a grant record. You have the option to select an existing year and grant ID for the new grant record using the **Year** and **Grant ID** fields at the top of the page. Or, you can type a new year and grant ID in the **Year** and **Grant ID** fields below the Grant Maintenance tab. If adding a new grant ID, you must enter the same year and grant ID in the **Year** and **Grant ID** fields at the top of the page and under the Grant Maintenance tab.

Year	Type a four-digit grant year. The grant year and ID must be a unique pair.
Grant ID	Type a grant ID. Dashes are allowed. This field can be a maximum of 20-alphanumeric characters. Or, click  to select an existing grant ID from the Grant IDs lookup . The grant year and ID must be a unique pair.



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