

Grant Maintenance - GRT3010

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This tab allows fiscal agents to view 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 a grant record:

Retrieve an existing grant record:

Field	Description
Year	Type a four-digit grant year. This field defaults to the current school year.
Grant ID	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. 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.

❑ 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 grant record:

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.

Add a request:

❑ From the top of the page, click Budget Adjustment, Budget Revision, or Reimbursement to add a new request. The corresponding pop-window opens allowing you to add the request. Once the request is saved or submitted, it is displayed under **Transactions**.

The **Budget Adjustment**, **Budget Revision**, and **Reimbursement** buttons are disabled when the **Processed Indicator** is selected.

Other functions and features:

Retrieve	The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
🗑	Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved.
Documents	View or attach supporting documentation.


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