**SPECIAL FEATURES USED IN GIFTS**

**July 25, 2012**

**ROLL BACK TO PENDING**

Is used in the event an error was made, or a change occurred after running the award process. Open the grant record and select Actions at the menu. Scroll about half-way down and click on Roll Back to Pending. Reply “Yes” to the question “Do you want to roll this request back to pending?” Now that it is back to pending, you may change whatever needs changing and re-award the grant. The system will again add any automatic requirements that are associated with the award process. If the change occurs in a month other than the original date of award, be cognizant of how it may affect the monthly financial reports.

**SYSTEM RENEWALS**

In the case of Charter Fund, the Directors approved a grant of $15M to be paid $3M a year for five years. Only the payment needs to be authorized by the Directors each year. The entire $15M is not entered as one grant. The budget will reflect a $3M grant each year. The grant agreement covers all of the payments, so that is not needed each time. To make a payment, there must be a grant.

To award the renewal, open the most recent grant in the series. Move to page 2. Enter an explanation ($15,000,000 over 5 years; this is year 3. Payment approved at the 8/21/12 board meeting.). Make sure the current date is after the “allow renewal after” field’s date. If it is not, change the date in this field to a date earlier in the month you are renewing it. The system will copy over all of the information, including contacts, to a new record and will assign it an ID number the same as the original (#9001430) but with a “point, plus 1” i.e. #9001430.1 or .2 or .3, etc. Any correspondence relating to this grant should be kept in the original file (#9001430), including the Charity Check report and payment documentation.

**GRANT COMMITMENTS**

General operating support for Encounter for Culture and Education (Encounter) is usually recommended as a grant commitment, which means the Board will authorize it one year for award the next (this allows for Encounter to be able to plan their budget). If not logged as “Fund = Grant Commitment, this field should be changed as soon as you are aware it will be a commitment instead of a regular grant. Grant commitments are tracked on an Excel spreadsheet and awarded in the designated year. [See H:\Records\Grants\Grt\_Commit\GrtComYR.]