Submit a Budget Modification

Need to reallocate funding and modify your current budget? Submit a budget modification by creating a **Purchase Order Change Request (POCR)** on your current budget aka your Active Purchase Order (PO).

Before We Begin

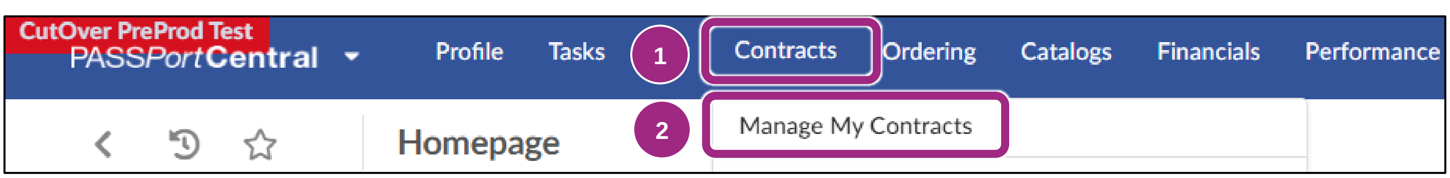
Users must be assigned one or more of the following PASSPort user roles to complete the steps in this guide:

- **Vendor Admin**
- **Vendor Financials L2**.

Search For Your PO

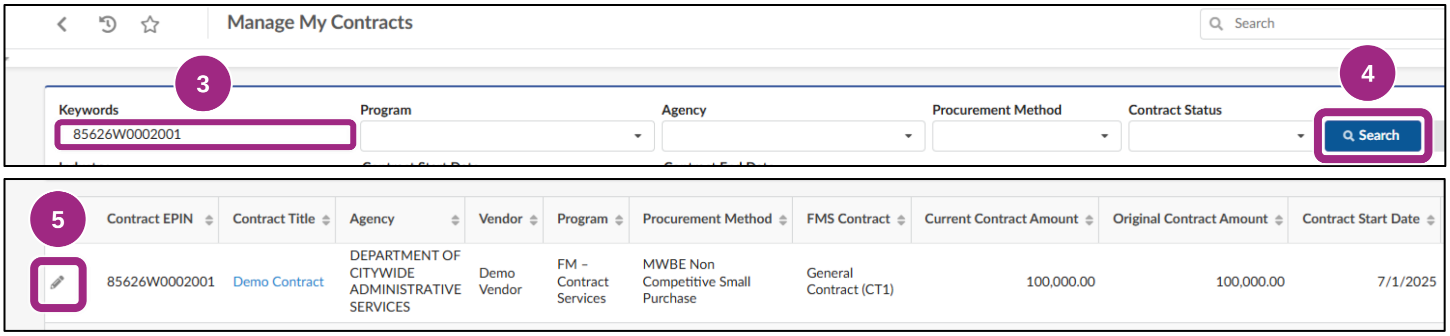
Find Your Purchase Order (PO) ID

1. Click **Contracts** in the top navigation menu.
2. Select **Manage My Contracts** from the drop-down menu.



The Manage My Contracts page appears.

3. Enter the Contract EPIN or Contract ID in the **Keywords** field or use the other search filters to locate your contract.
4. Click the **Search** button. Search results will appear below the search filters.
5. Click **pencil** icon to enter the contract.



The contract opens into the Overview tab.

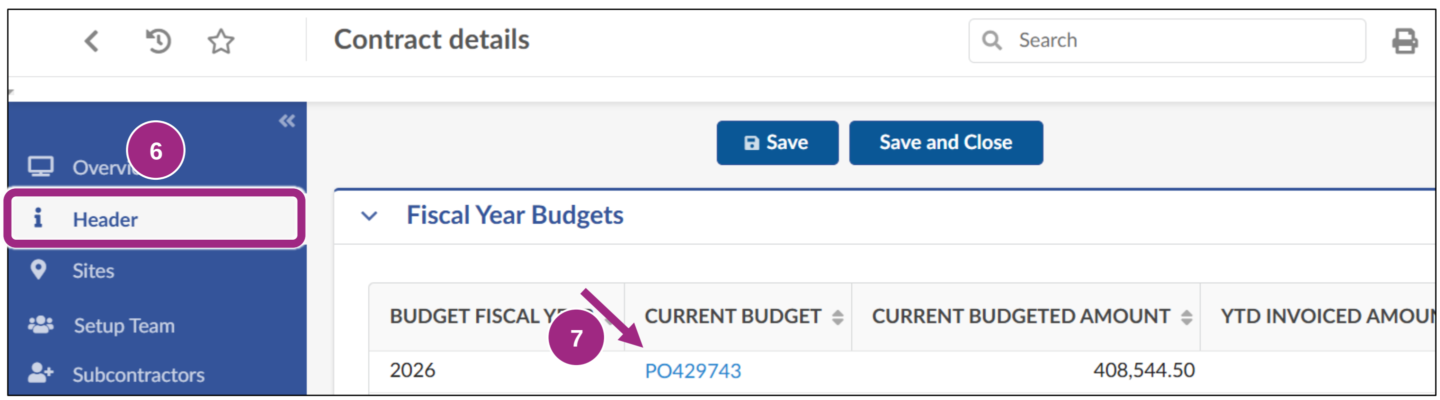
6. Go to the **Header** tab using the left navigation menu.

   Tip: If the left navigation menu is collapsed, click the double arrow in the top left corner to open it.

   Note: Before moving forward, review the Contract ID/EPIN to confirm you are in the right contract.

7. Scroll to the **Fiscal Year Budgets** section near the bottom of the page to view the PO ID.

   Important: Do not trigger the POCR directly from the PO hyperlink on this page. Instead, review the [Locate the PO](#) section of this guide for instructions on how to create the POCR.



Tip: If no budget is visible in the Current Budget field, reach out to your contracting agency to request they launch the PO.

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Review the Contract Setup Team and Roles

To create or modify a budget, users must be listed in the Setup Team of the contract associated with the purchase order. They must also be assigned at least one of the required roles below:

- **Vendor Admin**
- **Vendor Financials L2**

To confirm which users can complete budget tasks, a Vendor Admin should do the following:

1. In your contract, go to the **Setup Team** tab using the left navigation menu.
2. Scroll down to the **Vendor Team** section and confirm the right user(s) are listed as a contact with the correct role. If they are listed, the user can proceed to create or modify the budget.

   If they are not listed, view the Edit the Vendor Team guide for instructions on how to add a contact.

Important Reminders:

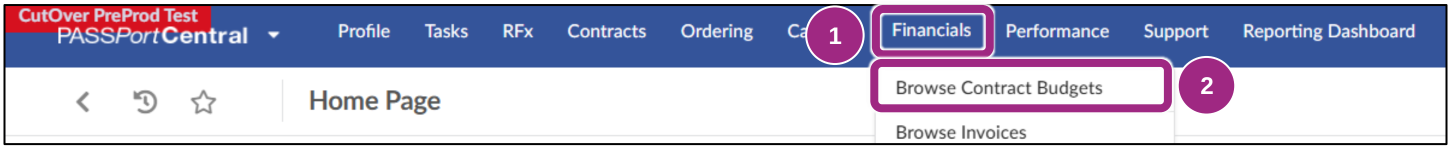
- A POCR can only be created for a PO in **Active** status.
- A new POCR cannot be created if one is already in progress.

  Go to the Change Log tab in the left navigation menu of the PO to view existing POCR.

Create and Submit the POCR

Step 1: Locate the PO

1. Click **Financials** in the top navigation menu.
2. Select **Browse Contract Budgets** from the drop-down menu.

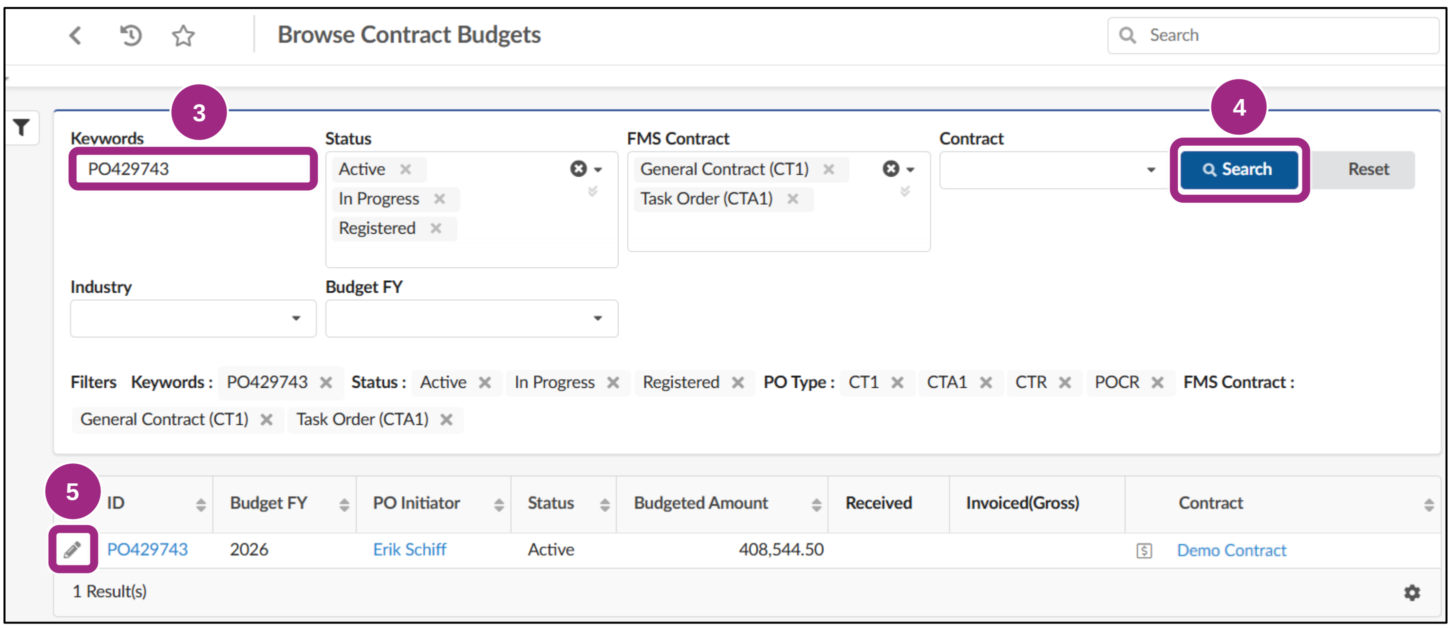


The Browse Contract Budgets page appears.

3. Enter the PO ID in the **Keywords** field.

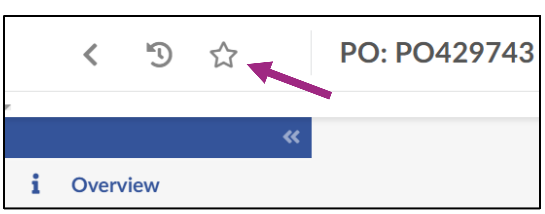
   Tip: If you do not know your PO ID, review the [Find Your PO ID]() section above.

4. Click the **Search** button. Search results appear below the search filters.
5. Click the **pencil** icon to enter PO.



The Purchase Order opens into the Overview tab.

Tip: Once you find your PO, you can bookmark it by clicking the **star** (favorites) icon in the top left corner of the screen.



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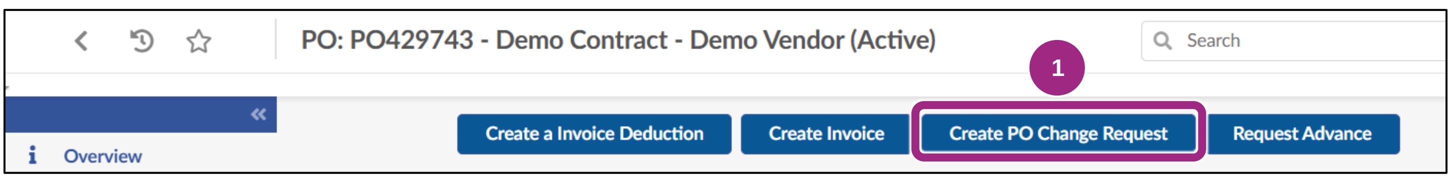
Step 2: Create the POCR

Note: If the **Create PO Change Request** button does not display, check for the following:

- Are you viewing the Active PO? See [**Search For Your PO**] to locate the correct PO ID.
  Tip: If you see the Link to PO field in the Overview tab, you are NOT viewing the Active PO.
- Do you have the necessary user role to complete this task?
  See the [**Review the Contract Setup Team and Roles**] section of this guide for details.
- Is a POCR already in progress? Previously initiated POCRs can be found by clicking **Change Log** in the left-side navigation. Submit or cancel any pending POCRs.
- Do you have an in-progress invoice or advance? If so, a blocking alert will appear at the bottom of the Select POCR Type window: "An Invoice for this PO is in progress. Vendor cannot create a Budget PO Change Request at this time." Invoices must be in **Disbursed**, **Payment in Progress**, **Canceled**, or **Draft** status to submit a POCR for the associated fiscal year.
- Has your contracting agency enabled vendor-submitted budgets? Check with your agency to confirm.
- Is your contracting agency updating contract financials? Check with your agency to confirm if they have a Financial Contract Change Request (FCCR) in progress. This is an agency action that must be approved or canceled before you can proceed with the POCR.

To begin creating a POCR, follow the steps below:

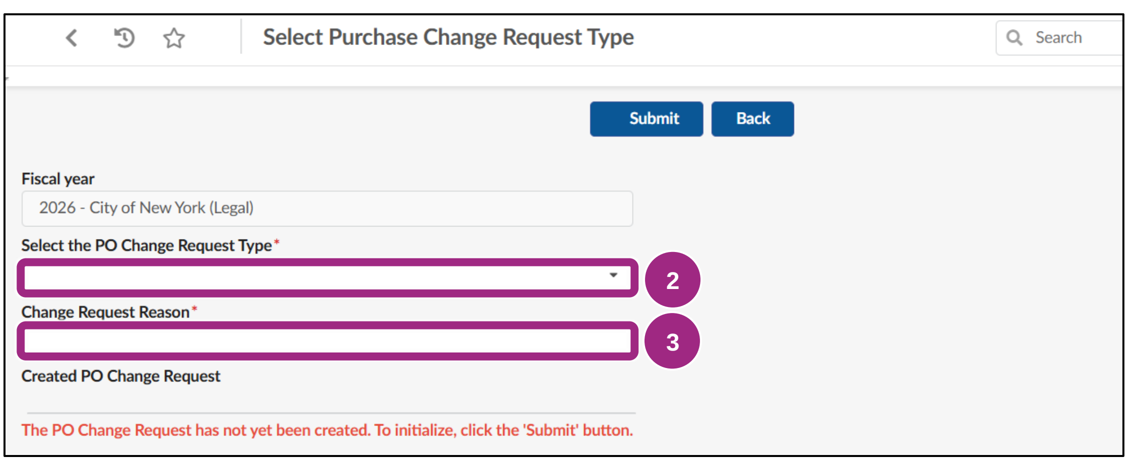
1. Click the **Create PO Change Request** button near the top of the page.



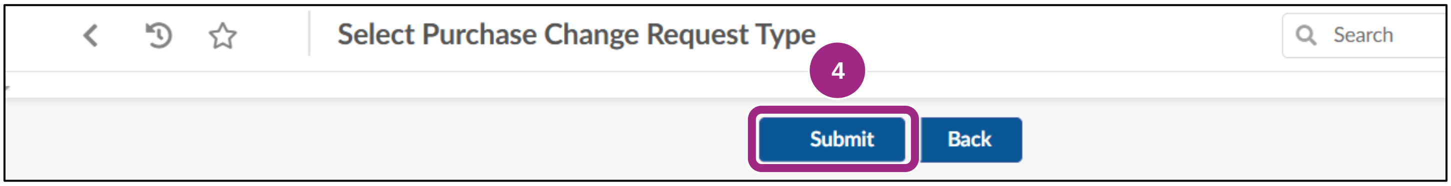
   The Select Purchase Change Request Type page appears.

2. Select **Budget Change Only** from the **Select the PO Change Request Type** drop-down menu.
3. Enter the reason for the request in the **Change Request Reason** text field.

   Example: "Setup Budget" or "Add COLA/WEI".



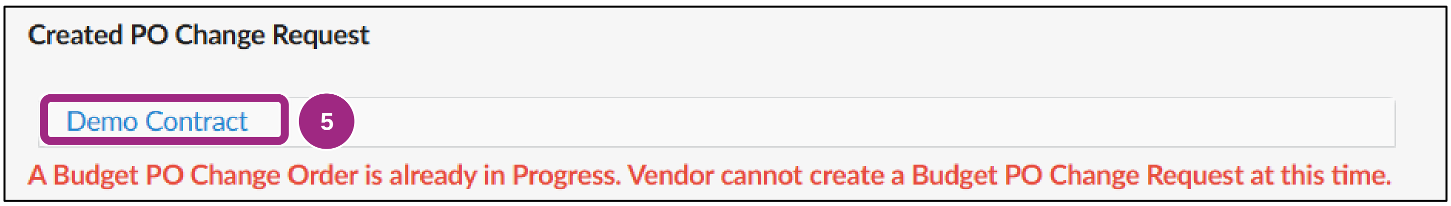
4. Click the **Submit** button near the top of the page.



The page refreshes and the **Create PO Change Request** field populates with a hyperlink. Below this field, red text appears indicating that a POCR is in progress. This refers to the POCR you just created.

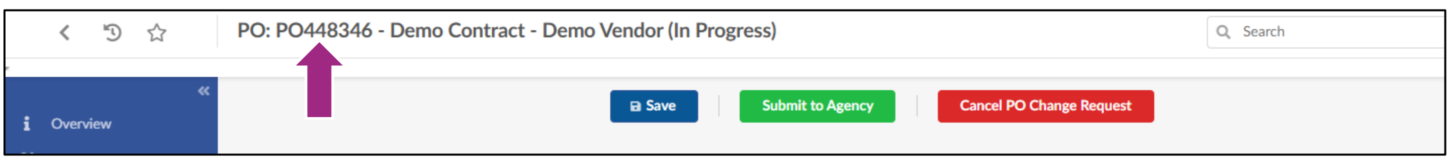
Important: Additional POCR cannot be created without first submitting or canceling the existing “In Progress” POCR.

5. Click the **hyperlink** to open the POCR.

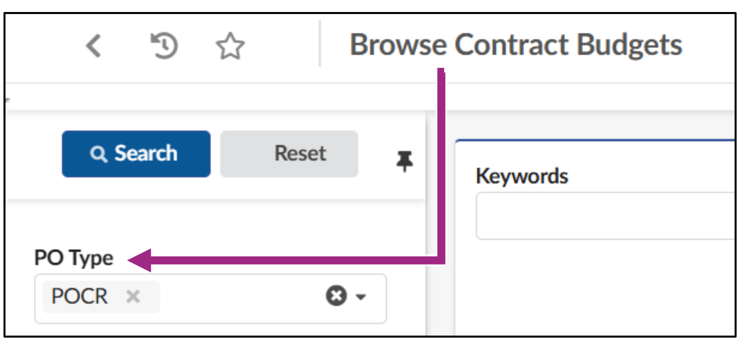


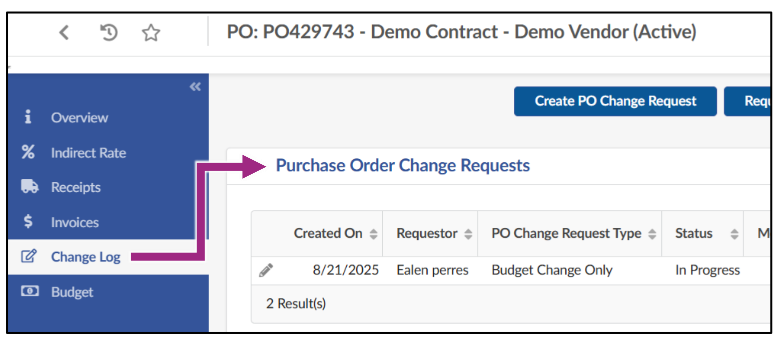
Notice at the top of the POCR that the PO ID has changed. This new PO ID is associated with your POCR. To view the PO ID of the purchase order you are currently modifying (the Active PO):

- Go to the POCR’s Overview tab and scroll down to the **Link to PO** field, or
- Go to the Contract’s Header tab and scroll down to the **Fiscal Year Budgets** section.



Note: If you exit the POCR and need to find it again, existing POCR can also be found by going to **Financials > Browse Contract Budgets** and filtering by the PO Type or by viewing the Active PO’s **Change Log**.

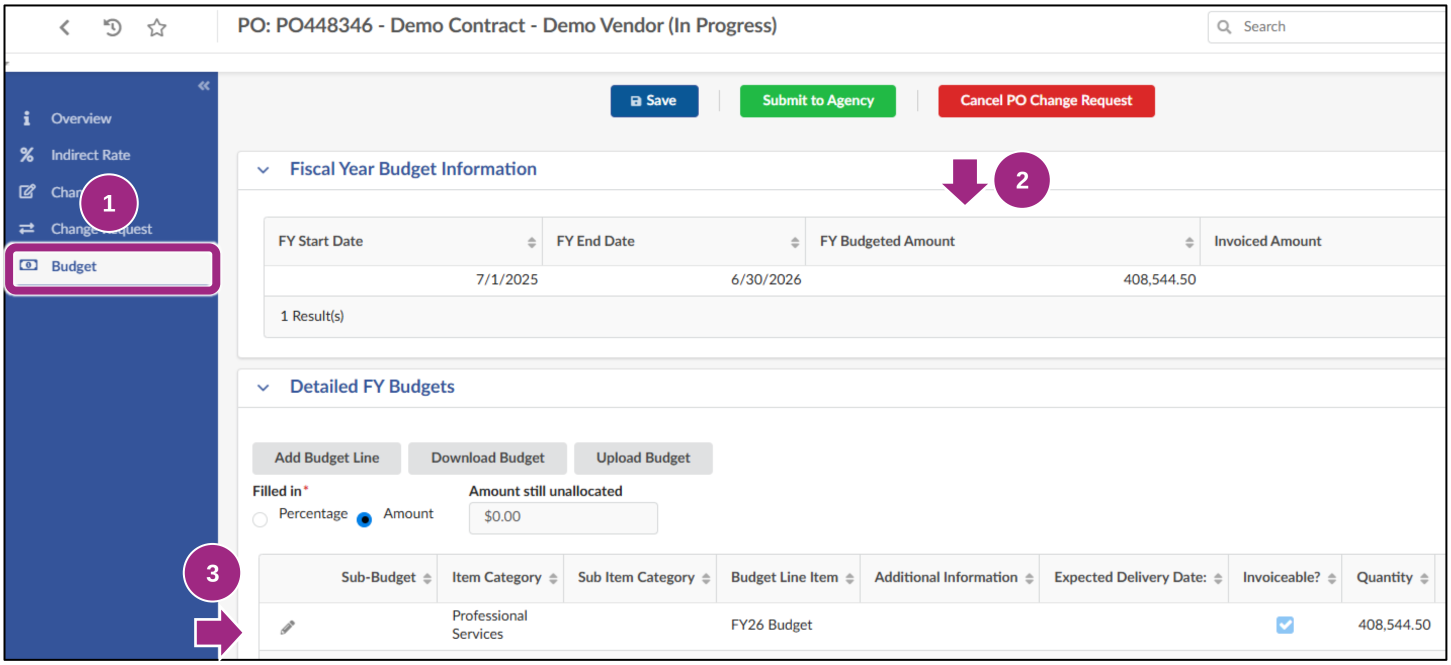




Step 3: Locate the Budget

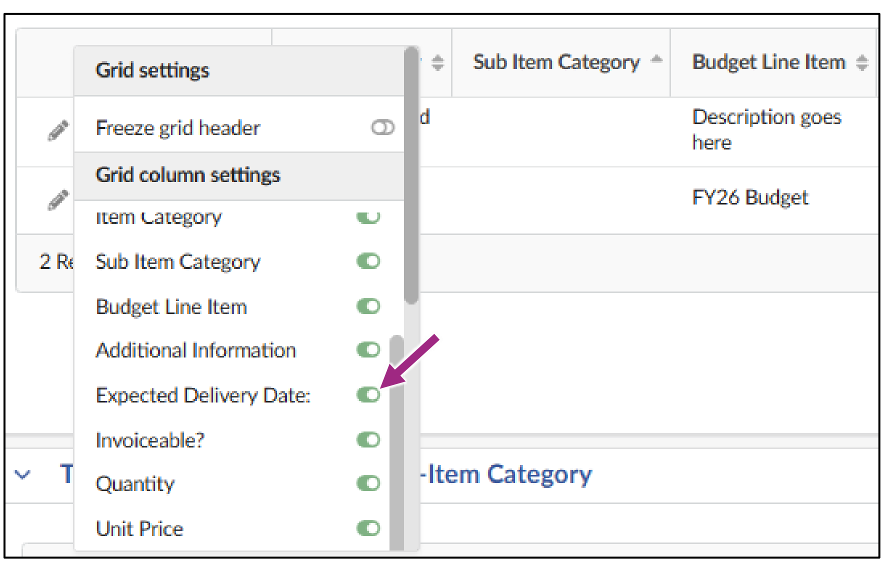
1. Inside the POCR, go to the **Budget** tab using the left navigation menu.
2. Notice the **FY Budgeted Amount** in the Fiscal Year Budget Information section at the top of the page. To submit a POCR, the full amount must be allocated when modifying a budget.

   Note: The FY Budgeted Amount is subject to change during this process. Contact your contracting agency if you have questions about changes to the budget amount.
3. Scroll down to the **Detailed FY Budgets** section to view and edit your budget lines.



Tip: Right-click the header row in the budgets table to view the **Grid Settings** menu. This menu allows you to drag and drop table columns to change the order in which they appear. You can also hide/unhide columns by clicking the toggle on/off switch.

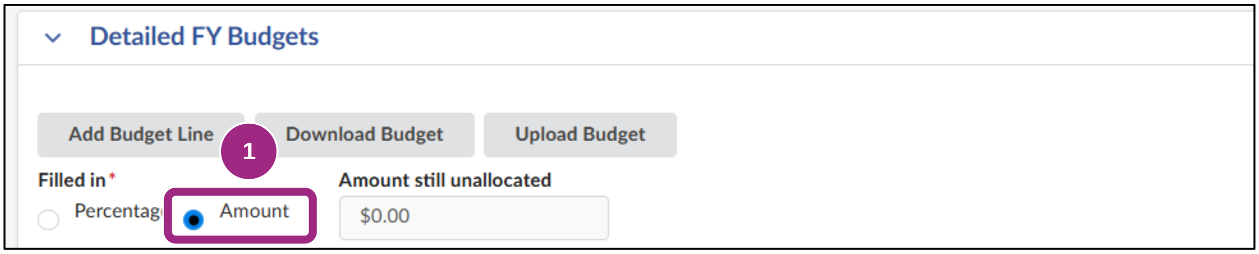
To download the tables contents, scroll to the bottom of the menu and click the “Download table in Excel format” option.



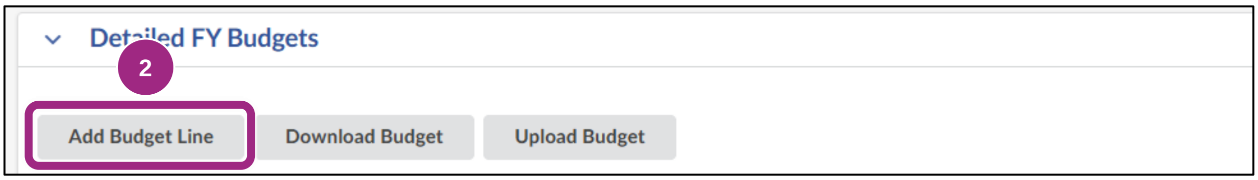
Step 4: Add Budget Lines

Add Individual Lines

1. In the Detailed FY Budgets section, if the **Amount** radio button is not already selected, select it before adding lines to your budget.



2. To add budget lines one at a time, click the **Add Budget Line** button.

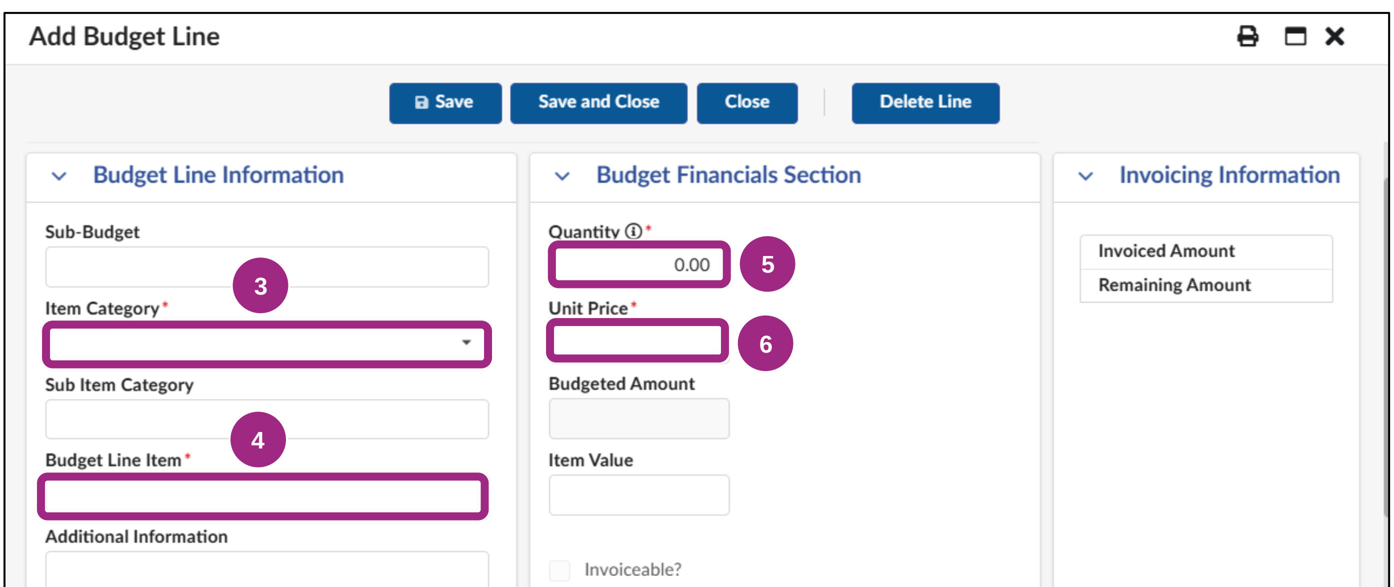


   The Add Budget Line window appears.

3. Click the **Item Category** dropdown and select the appropriate category to define the deliverable of the budget line.

   Note: If a category is not listed in the drop-down, select "Other" instead. Keep in mind that for Human/Client Service contracts, selecting the correct item category is crucial because the indirect rate calculation is driven by the information entered in the item category.

4. Enter a label in the **Budget Line Item** text field to provide a detailed description of the deliverable.
5. Enter a price in the **Quantity** field. This is the amount budgeted towards the goods or services described by the line.
6. Enter **1** in the **Unit Price** field.



Important Reminders:

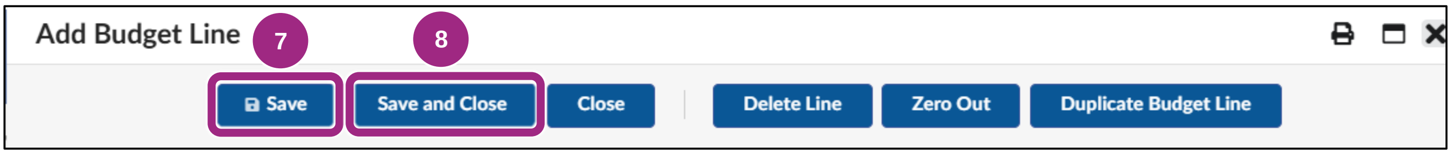
- Always enter a **Unit Price of 1** unless the contract is rate-based or involves equipment.
- The **Item Value** should always be left blank.
- Vendors cannot check the **Invoiceable?** checkbox. Agencies are responsible for marking items invoiceable. If a line needs to be invoiceable, reach out to the agency for assistance.

7. Click the **Save** button at the top of the window.

   The page refreshes and additional buttons appear at the top of the window.

   Note: Review the Alert section below the Save button to see if any blocking alerts appear. Any red blocking alerts must be corrected before moving forward.

8. Click the **Save and Close** to return to the Budget page.



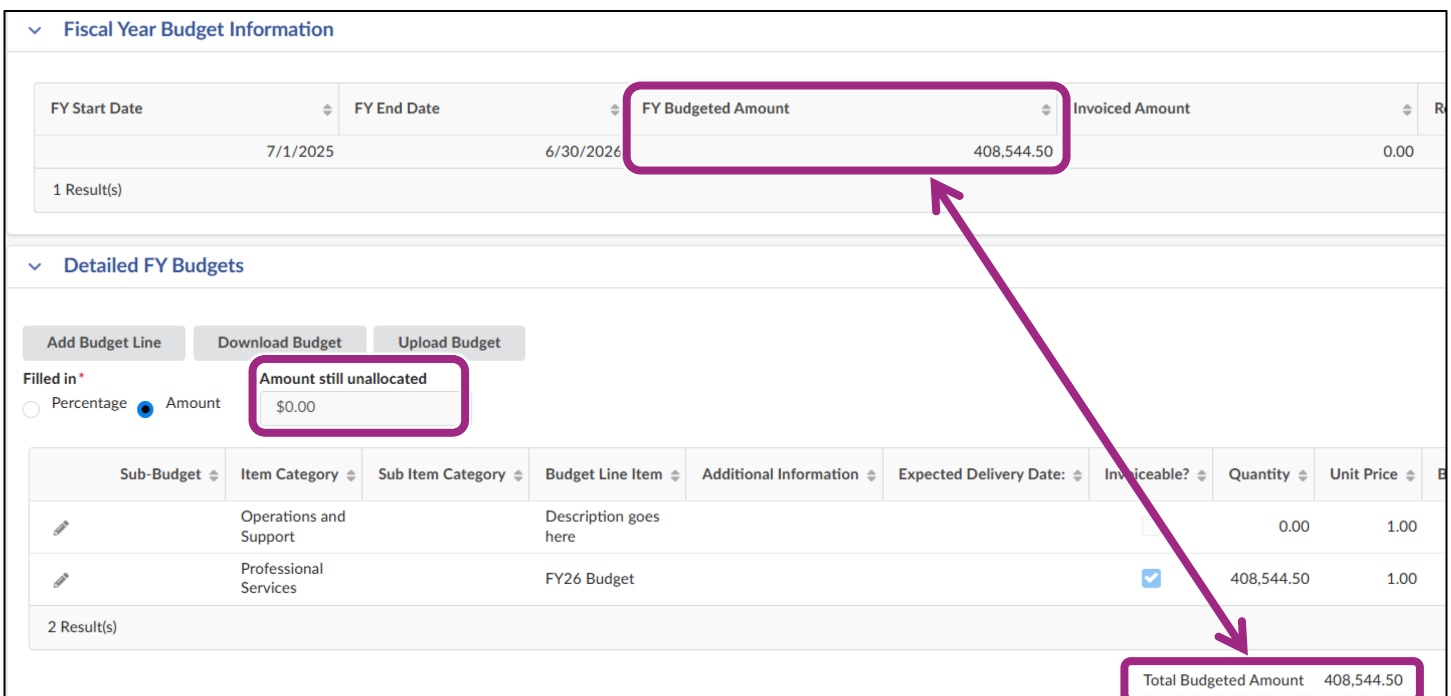
Notice the new line is now listed in the budget table.

Tip: Keep an eye on the **Amount still unallocated** field—it shows the remaining budget you still need to allocate.

A positive amount means that you have **under**budgeted and need to add additional lines or increase the budget amount of your existing lines.

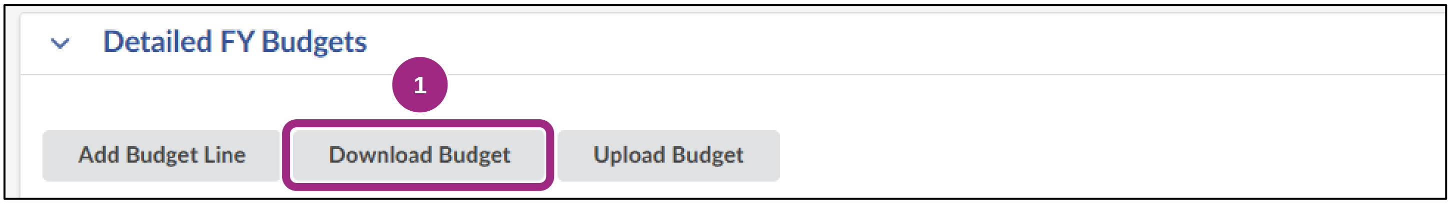
A negative amount means that you have **over**budgeted.

Remember: The Amount still unallocated field must display $0.00, meaning that your **FY Budgeted Amount and Total Budgeted Amount are equal**.



Upload Budget for Bulk Entries

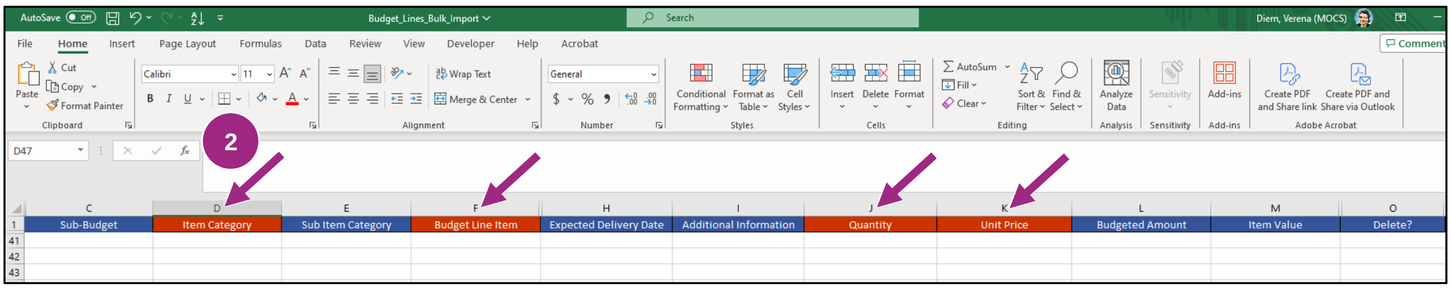
1. The **Download Budget** button will open an excel file where budget lines can be manually entered.



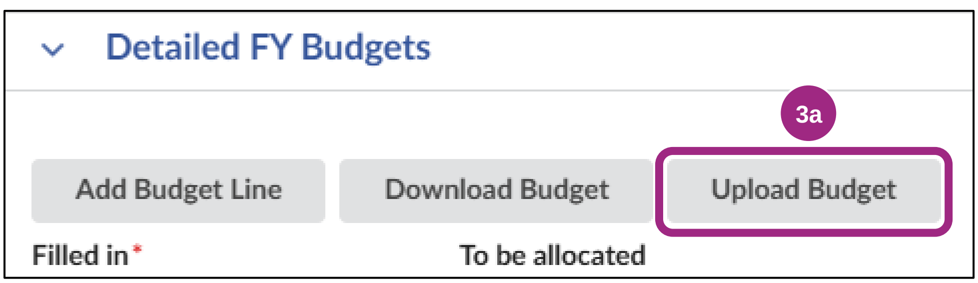
A template will download to your computer. Make sure there are no pop-up blockers set up in your web browser.

2. Open the Excel file and enter budget line information according to the column labels.

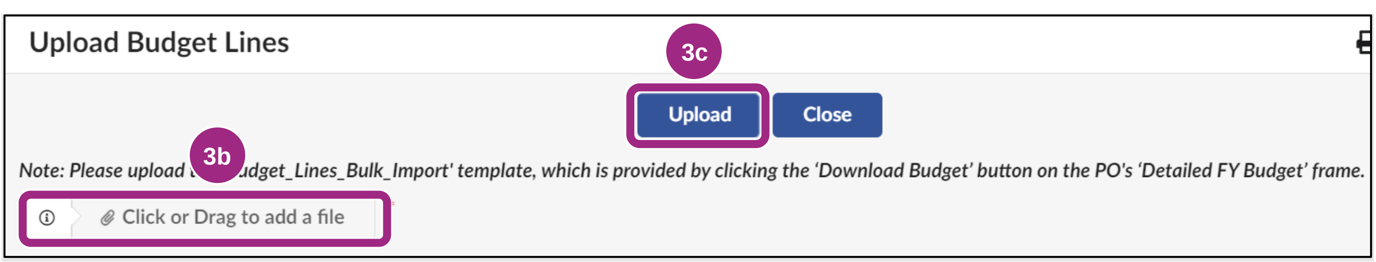
   Columns marked in **red** indicate required fields. Save the file to your computer.



3. Upload the spreadsheet in PASSPort:
   a. Click the **Upload Budget** button.



   b. Click the **Click or Drag to add a file** button and follow the prompts to upload the budget.
   c. Click the **Upload** button.



Once your budget is uploaded, you can review and edit the lines as needed. Remember that the Amount Still Unallocated field must display $0.00 before you can submit the POCR.

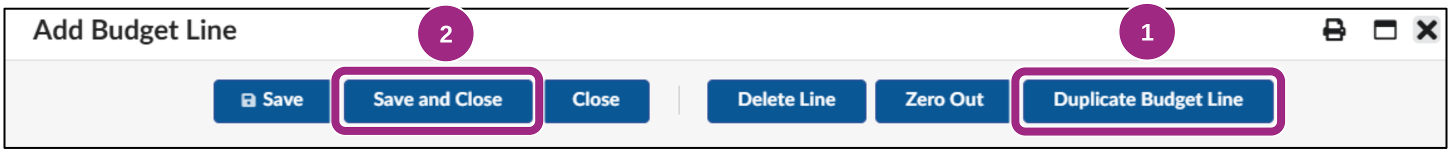
Duplicate Budget Lines

This feature allows vendors to duplicate an existing budget line. It does not, however, duplicate the financial information associated with the line (e.g., quantity, unit price.)

1. To duplicate a line, select an existing budget line and click the **Duplicate Budget Line** button at the top of the Add Budget Line window.

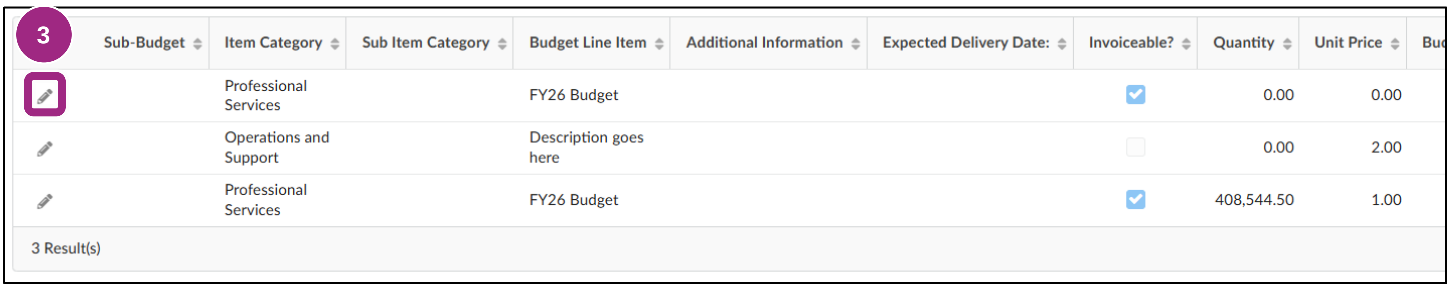
   The page will refresh.

2. Click the **Save and Close** button to return to the Budget page.



3. Notice a new line now exists in the Detailed FY Budgets table.

   Click the **pencil** icon on the new budget line to enter financial information.



	Sub-Budget	Item Category	Sub Item Category	Budget Line Item	Additional Information	Expected Delivery Date:	Invoiceable?	Quantity	Unit Price	Bud
		Professional Services		FY26 Budget			✓	0.00	0.00	
		Operations and Support		Description goes here				0.00	2.00	
		Professional Services		FY26 Budget			✓	408,544.50	1.00	

3 Result(s)

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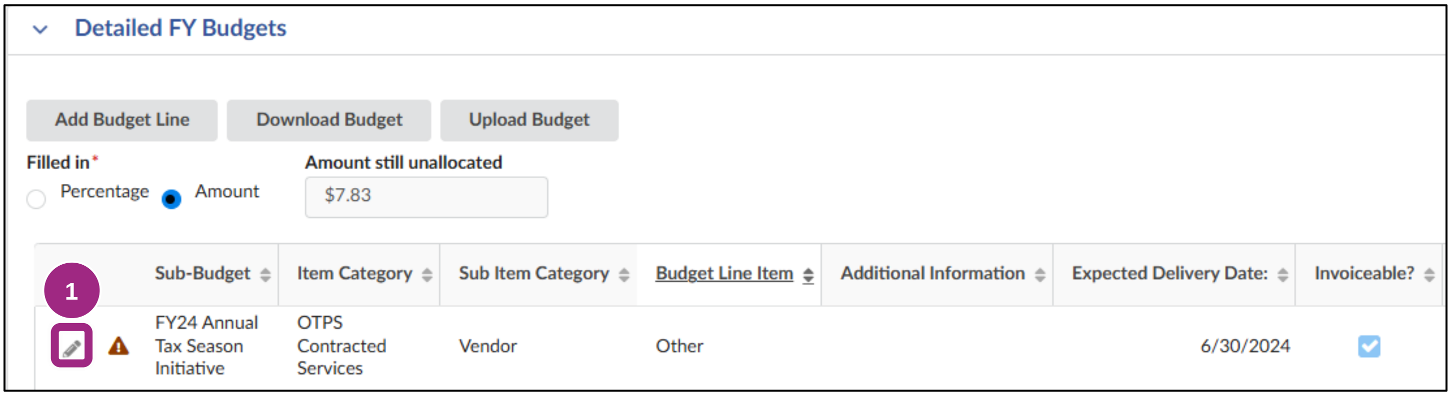
Step 5: Edit Existing Budget Lines

Important: If Allowance is selected in the Item Category field, do not edit this line unless you have authorization from your contracting agency. You should also adhere to the agency's prescribed sub-budgeted amounts if your budget has multiple sub budgets.

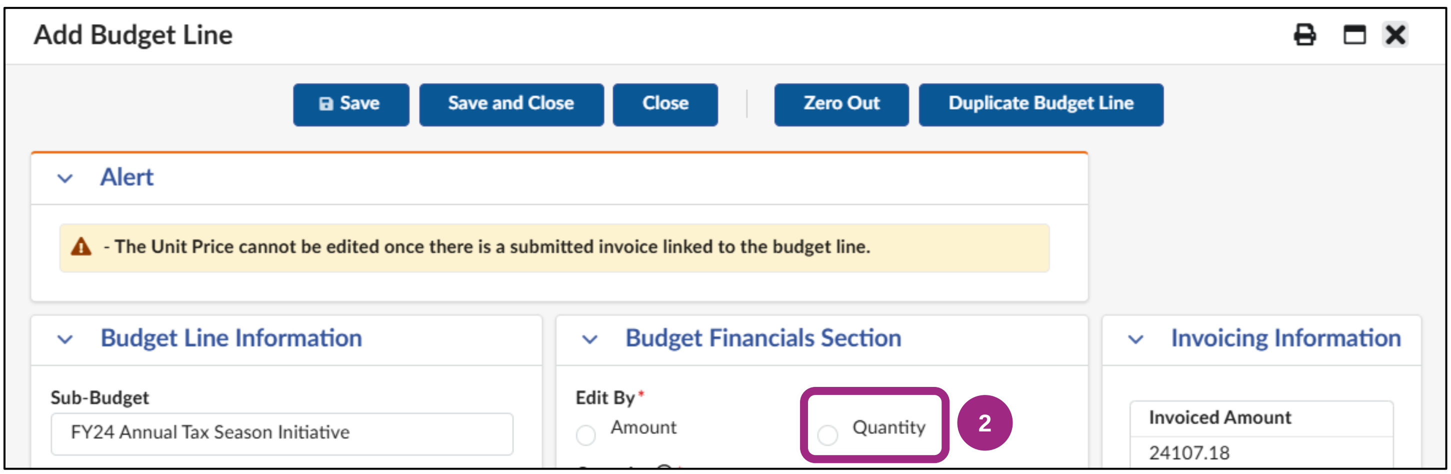
1. If you need to edit your existing budget lines, click the **pencil** icon to the left of the budget line.



The Add Budget Line window appears.

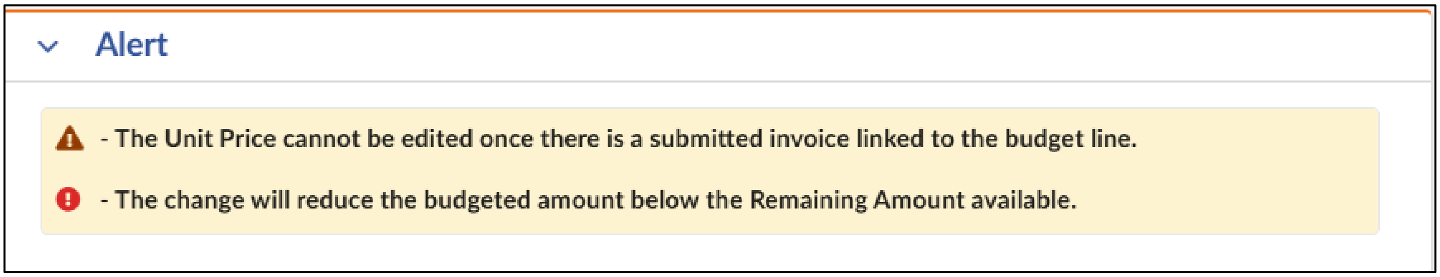
2. Edit the necessary fields.

   Be sure to click the Edit By **Quantity** radio button even if the Quantity will not change.



Important Reminders:

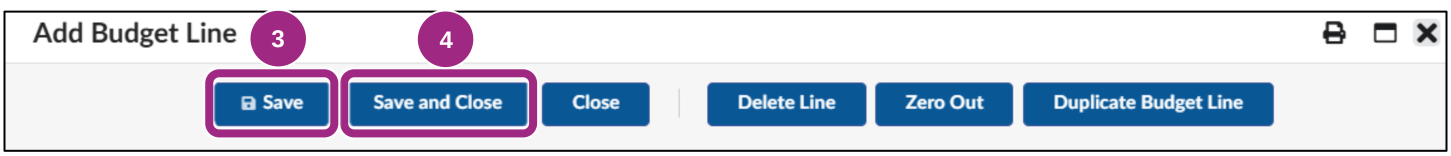
- The Unit Price field cannot be edited once the budget line has been invoiced against. A **brown caution alert** will appear in the Alert section for budget lines with an Invoice Amount greater than 0. This will not stop you from submitting the POCR.
- The Budgeted Amount cannot be less than the Invoiced Amount. This causes a negative number to appear in the Remaining Amount field. A **red blocking alert** will appear in the Alert section for budget lines with a negative Remaining Amount. To fix this, you must correct the Budgeted Amount so that it is greater than or equal to the Invoiced Amount.



3. Once the line is updated and there are no red blocking alerts, click the **Save** button.

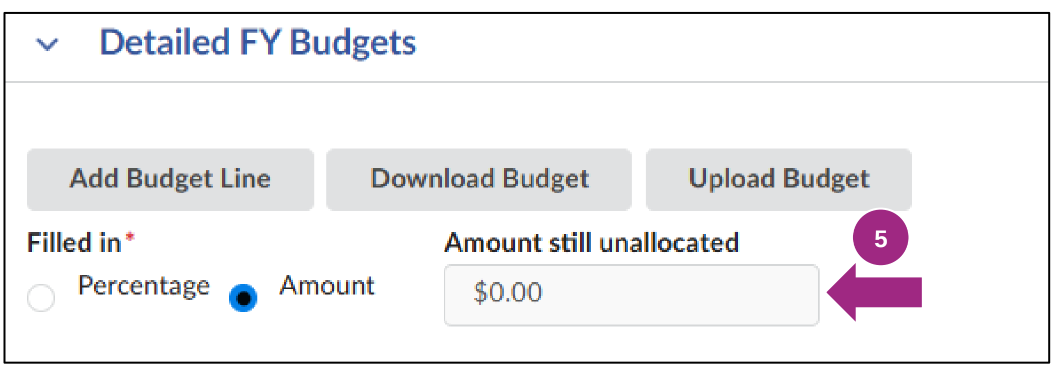
   Note: If the Quantity field was edited, before clicking the Save button, you must first click anywhere on the screen for PASSPort to intake the data. Then, click the Save button.

4. Click the **Save and Close** button.



   Repeat the steps above to edit additional lines.

5. Once all lines are finalized, review the **Amount Still Unallocated** field in Detailed FY Budget section. This field subtracts the amount of the budget lines we just added. It is important that the value in Amount Still Unallocated is $0.00 before submitting the POCR.



When to Zero Out?

Zero Out is a new button on the budget line. It has two functions, including:

- It allows the vendor to reduce the quantity/budgeted amount to 0 (if the line is uninvoiced), or
- It reduces the budget amount to the invoiced amount (if the line has already been invoiced).

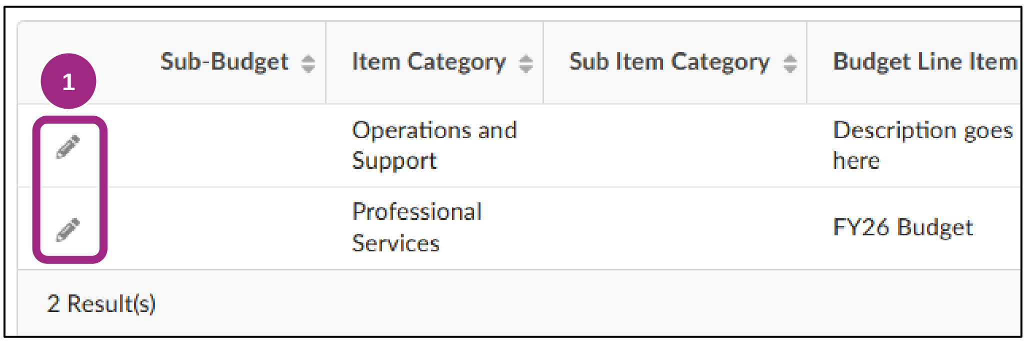
Important Reminders:

- If the Unit Price is above 1 and there are linked invoices against the budget line, the Unit Price cannot be edited. Instead, vendors must zero out the line.
- Once approved by the agency, lines can **NOT** be deleted, only zeroed out.
- Budget lines that have been invoiced against cannot be reduced to 0.

  The minimum amount an invoice budget line can be reduced to is the **Invoiced Amount**. The remaining amount can be added to another budget line.

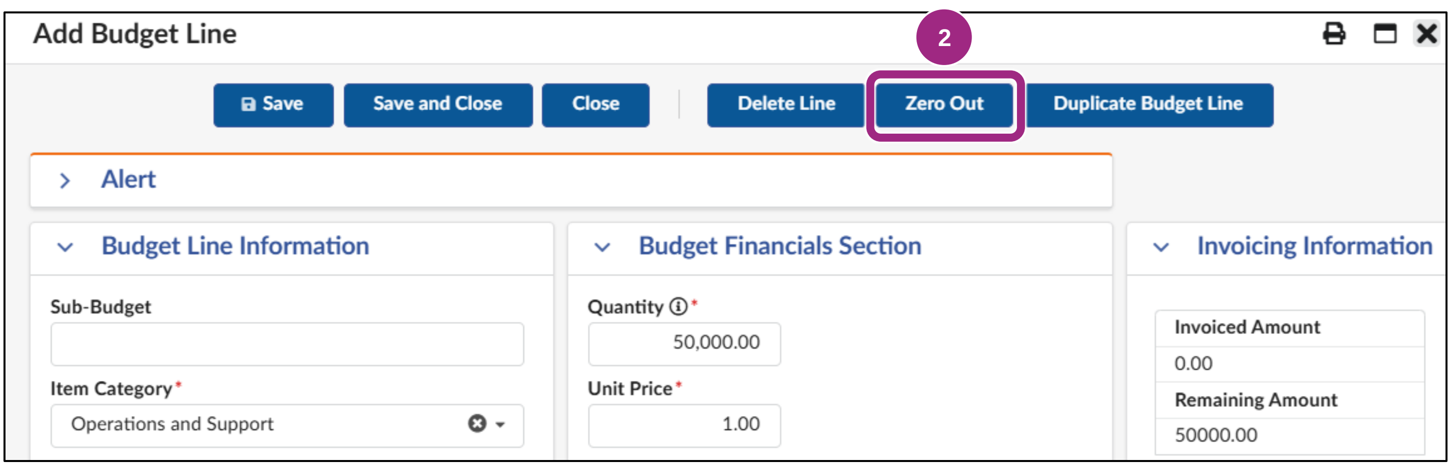
To Zero Out an existing budget line:

1. Click the **pencil** icon to the left of the budget line.



   The Add Budget Line window appears.

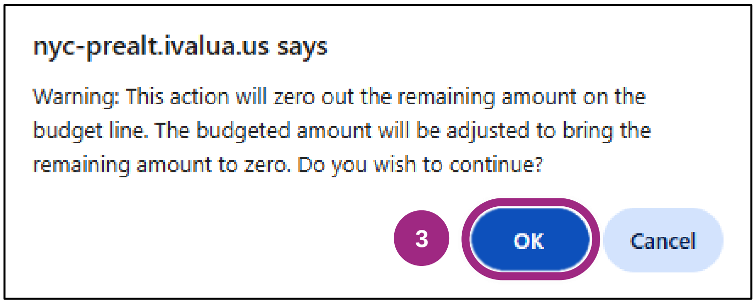
2. Click the **Zero Out** button at the top of the window.



3. A confirmation pop-up window appears at the top of the page with the following warning:

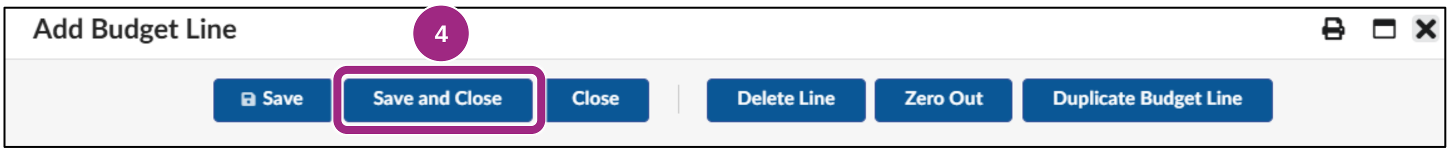
   This action will zero out the remaining amount on the budget line. The budget amount will be adjusted to bring the remaining amount to zero. Do you wish to continue?

   Click the **Ok** button.



   The page refreshes. Notice the Quantity, Budgeted Amount, and Remaining Amounts fields have been reduced to ‘0’.

4. Click the **Save and Close** button to return to the Budget page.



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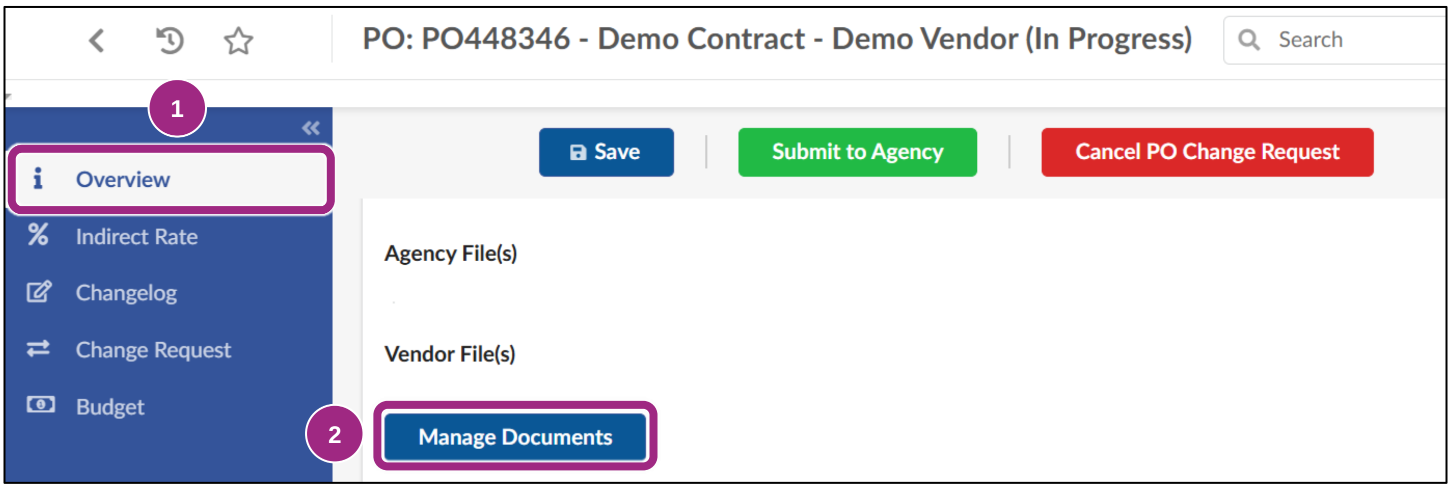
Step 6: Add Documents

Note: Documents can be uploaded at any time prior to submitting the POCR. If you submit the POCR before adding documents, you will need to reach out to your contracting agency to request they return the task to you.

1. Go to the **Overview** tab using the left navigation menu and scroll down the Header section to **Vendor File(s)**.
2. Click the **Manage Documents** button and follow the prompts to upload any required documents.

   For detailed guidance on how to upload documents, see [Upload or Link Documents to a Task]().

   Note: Most file types are accepted, including .doc, .docx, .rtf, .xls, .xlsx, .ppt, .pptx, .txt, .tif, .jpeg, and .pdf. Up to 10 documents can be uploaded simultaneously, as long as the documents combined do not exceed 300MB.



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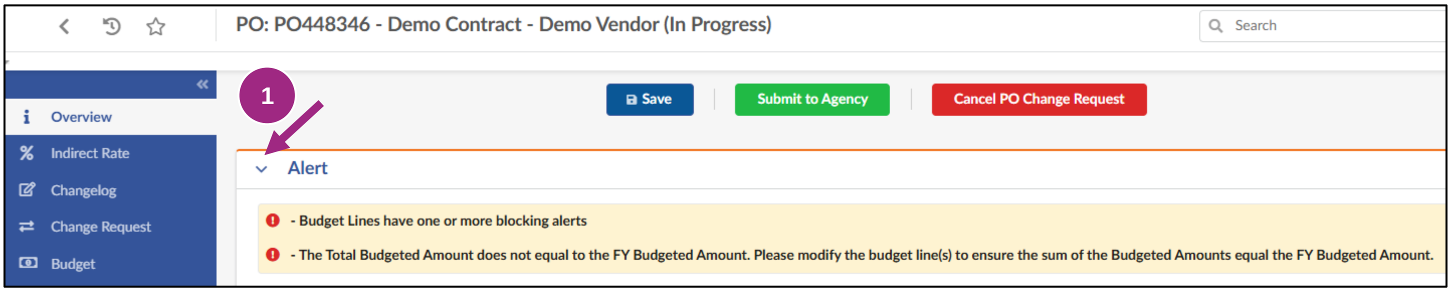
Step 7: Submit to Agency

Before submitting the POCR to the agency, check that all necessary changes have been made and all information is accurate.

1. In the Overview tab, check that there are no alerts in the Alerts section near the top of the page.

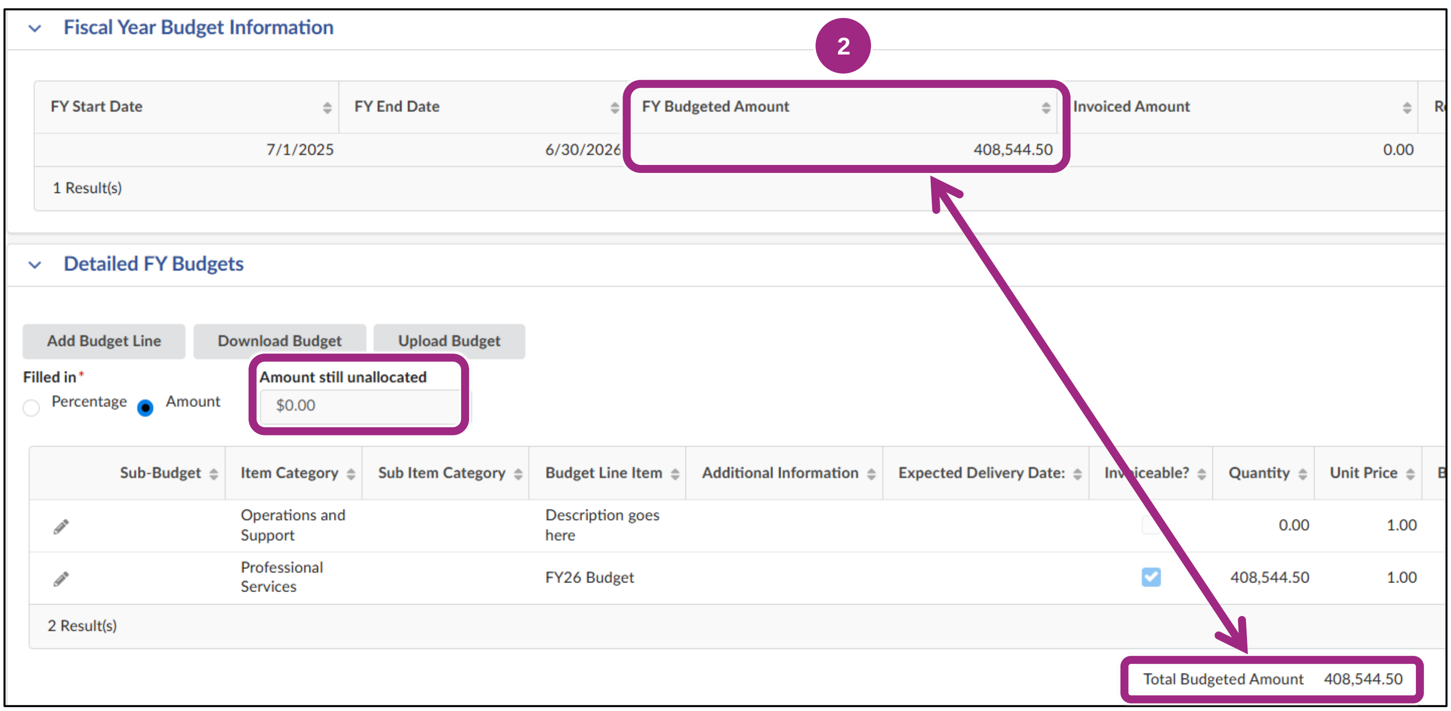
   Note: You may have to click the right-facing arrow in the top left corner of the Alert section to view the blocking alerts.



2. Here are a few common alerts to look out for:

   - **<u>Alert</u>**: The Total Budgeted Amount does not equal to the FY Budgeted Amount. Please modify the budget line(s) to ensure the sum of the Budgeted Amounts equal the FY Budgeted Amount.

     <u>Solution</u>: Go to the Budget tab and make sure the **Total Budgeted Amount** is the same as the **FY Budgeted Amount**. If not, edit the budget lines to ensure the **Amount Still Unallocated** field is equal to **0**.



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- **Alert**: Budget Lines have one or more blocking alerts

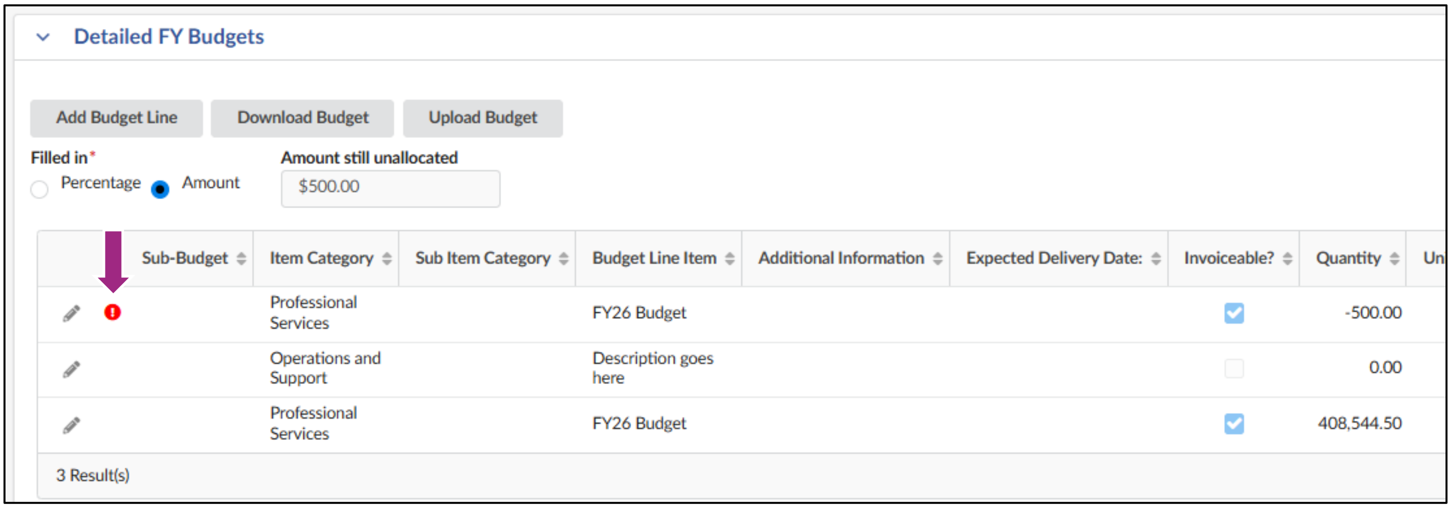
  Solution: Go to the Budget tab and review each budget line in the **Detailed FY Budgets** section.

  A red circle with an white exclamation mark will appear for any budget lines that need to be edited.

  A brown triangle icon appears on all budget lines that are linked to a submitted invoice. This is a non-blocking (caution) alert that will not prevent you from submitting the POCR.

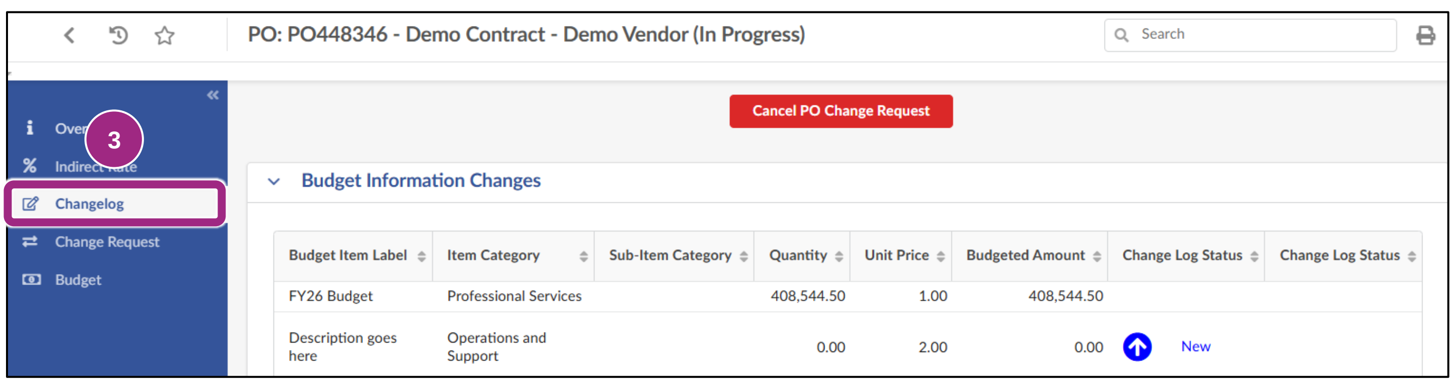
  Click the **pencil** icon to view the alert. Red alerts must be corrected before moving forward.

  See **Step 5: Edit Exisitng Budget Lines** to learn more about common budget line alerts.



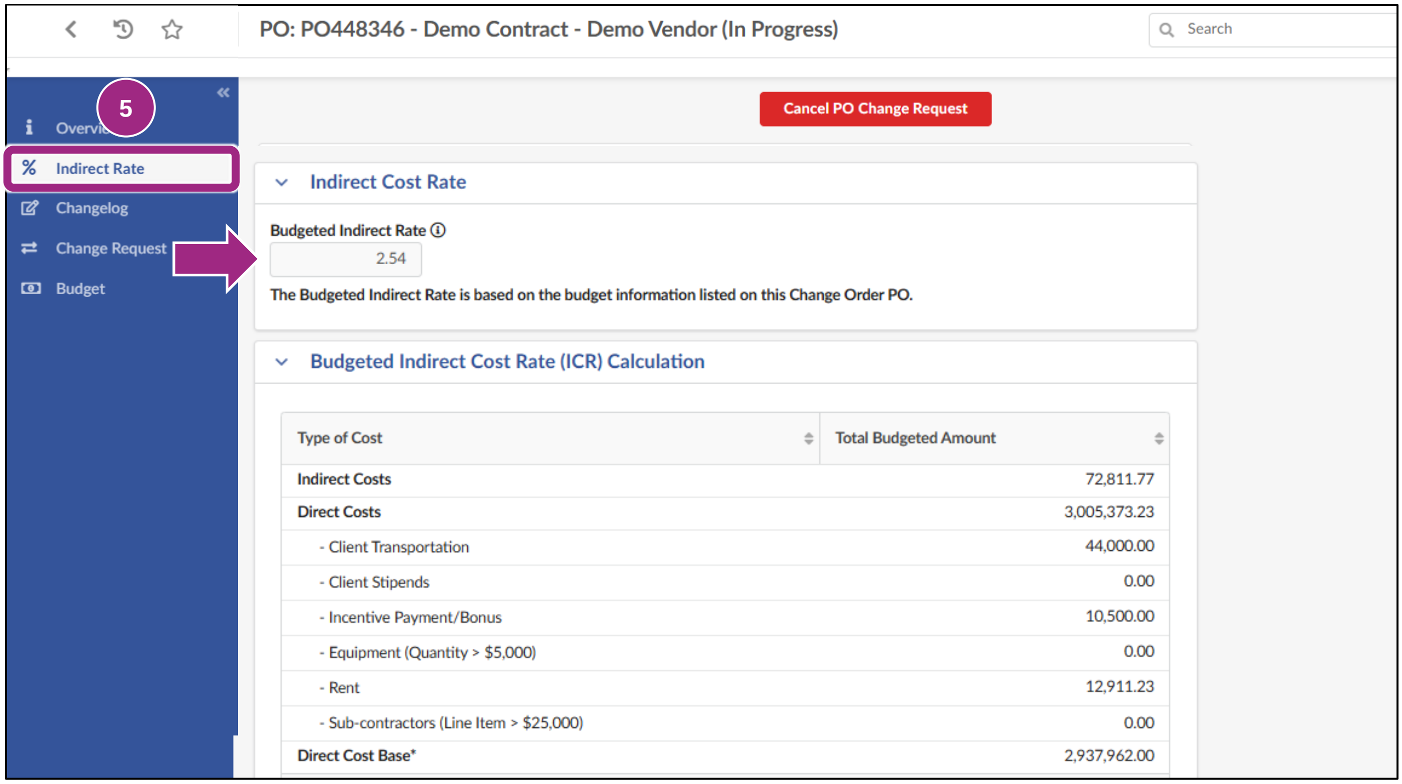
3. Once your budget is final and there are no blocking alerts, you can review all changes made to the budget in the **Change Log** tab, located in the left navigation menu.

   Ensure all information is accurate and nothing is missing



4. If you are a Provider with a Human/Client Service contract, you can view the Indirect Cost Rate (ICR) in the **Indirect Rate** tab, located in the left navigation menu.

Ensure that the **Budgeted Indirect Rate** field matches your expectations before submitting your POCR to avoid budgetary delays.



Important Reminders:

- The ICR is generated based on the budget and calculated using the following formula:

  (Indirect Costs / Direct Cost Base) × 100%

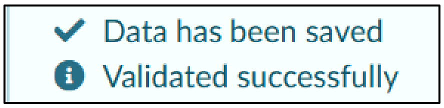
- The following factors are “distorting factors” and are not included in Direct Costs:
  - client transportation
  - client stipends
  - incentive payment/bonus
  - equipment (quantity > $5,000)
  - rent
  - subcontractors (line item > $25,000)

- The ICR is automatically calculated. You can find the approved ICR in the cost manual. For more information, review the [Indirect Cost Rate Initiative](#) page.

5. Once the budget is final, click the **Submit to Agency** button at the top of the page.

The page refreshes and a validation message appears near the top of the page. This confirms your budget was successfully submitted.

Note: If you click submit and see **Data Not Saved** that means there is a blocking alert. Address the alert and try again to submit.



Next Steps

- The contracting agency may either approve the budget or return it for revision.
  You will receive an email notification if the budget was returned for revision.
- If the agency **approves** your budget, the POCR status will change to **Registered** and the underlying Active PO will be updated with your changes.

  The Active PO can be found:

  - From the POCR, in the **Link to PO** field within the Overview tab, or
  - From the Contract, in the **Fiscal Year Budgets** section within the Header tab.
- Once the POCR is approved, you can begin invoicing or submit another budget modification.

Note: Take note of your Active Purchase Order's PO ID. Both Purchase Orders and Purchase Order Change Requests use PO IDs as their unique identifiers. However, invoices can only be made against Active status Purchase Orders.

Important Reminders:

- Providers can now cancel their own POCRs in PASSPort while the PO is in progress. These POCRs must be vendor-submitted budgets.
- Providers can submit invoices for FY POs that are not being modified. For example, if a POCR is in progress for your FY26 PO, you can still submit an invoice for your FY25 PO if there is no change request in progress for it.