

How to Complete an Amendment Request

1. Navigate to the Landing Page of the Grant Agreement you'd like to amend.

One way to do this is Searches → Applications/Grants → Enter agreement number → click Search → click the agreement name

Applications/Grants

Document Search

Document Name 0033	Year
Document Type	Status
Organization	Person

Clear Search

Documents

Number of Results: 1

Name	Organization	Type	Status	Sub Code	Status Date
COM22-0033	GroundUP	CDBG - Downtown Revitalization Program - 2022	Amendment Request in Process (CDBG)	2022	7/5/2022 2:41:40 PM

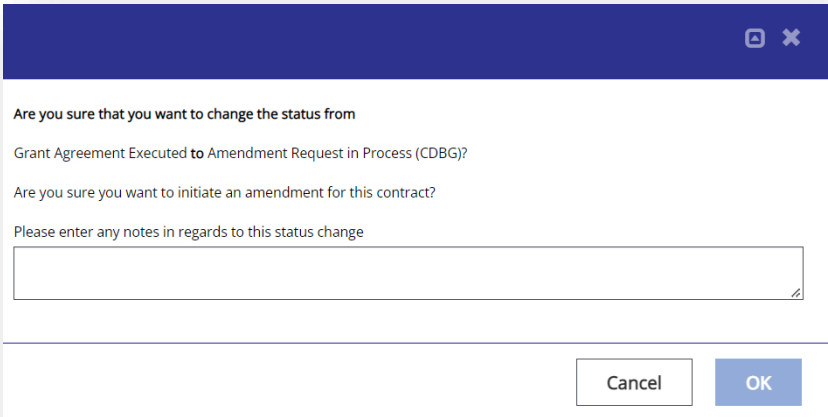
2. In the blue sidebar under Status Options, click "Begin New Amendment".

Amendment

- ~~Amendment Request Form~~
- ~~Amendment Certification Form~~
- ▼ Status Options
 - Begin New Amendment**
 - Begin Closeout

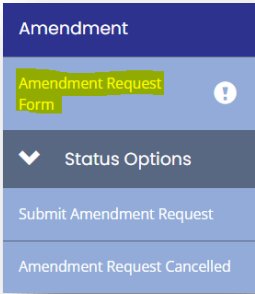
NOTE: Do not click "Amendment Request Form" yet. Start by changing the status.

This box will pop up with a status change notification. You can leave a clarifying note here such as “extend agreement 6 months”.




A confirmation dialog box with a dark blue header and footer. The header contains a close button (X) and a help icon. The main content area is white and contains the following text: "Are you sure that you want to change the status from Grant Agreement Executed to Amendment Request in Process (CDBG)? Are you sure you want to initiate an amendment for this contract? Please enter any notes in regards to this status change". Below the text is a large text input field. At the bottom right, there are two buttons: "Cancel" and "OK".

3. In the blue sidebar, click Amendment Request Form.



4. Complete the Purpose and Justification fields.



A form for creating an amendment. It features three main sections: 1. "Amendment # *": A text input field. 2. "Purpose of Amendment *": A text area with a character count of "0 of 100". 3. "Justification - Please explain why this Amendment is necessary. *": A large text area with a character count of "0 of 4000".

NOTE: The Amendment # will be entered by TDA staff.

- **Purpose** – Provide a clear, high-level reason for the amendment request.
 - *Examples: Final quantity adjustment; Extend contract six months*
- **Justification** – Explain in detail why TDA should approve the amendment request. More details provided here could prevent delays in processing the request.

5. Check the appropriate boxes under Exhibit A and Exhibit B

Exhibit A

Check the box for each section of the Agreement where revisions are proposed.

A . Request to change Performance Statement / Scope of Work

C. Request Change to Timeline

D. Request Change to Special Condition

Exhibit B

Request Change to Budget

NOTE: Depending on your selection, additional fields will appear.

If the requested grant agreement change is related to a construction contract change order, a request to approve the change order must be submitted at the same time as the Amendment request.

- **Navigate to the existing Materials & Services Report.**
- **Change the status by clicking Begin New Change Order, Complete the form, Save the page.**

CDV22-0016-MSR-01

Document Landing Page

Forms

Materials and Services Record Main Form

MSR Change Orders

MSR Subcontractors

Status Options

Begin New Change Order

Begin MSR Completion Report

Template Materials and Services Report 2022	Instance Materials and Services Report 2022
Document Name CDV22-0016-MSR-01	Document Status MSR Vendor Selection Accepted
Organization Test Grantee Organization	Your Role Project Director

Obligations to Date

Name of Vendor(s)	Total Grant Awarded	Amount Identified as CDBG on MSRs	Com

Performance Statement Amendments

A. Provide a summary of the requested changes.

Exhibit A

Check the box for each section of the Agreement where revisions are proposed.

A. Request to change Performance Statement / Scope of Work

Brief summary of requested changes. *

0 of 2000

Any updates the Performance Statement must be completed via Microsoft Word track changes. [Please click HERE to generate the Performance Statement Track Changes.](#)

[Please upload Performance Statement Track Changes HERE.](#)

Select

Drag Files Here

- Explain how the proposed changes still meet the current need as described in the performance statement.
- Explain any impacts on beneficiaries these changes will have.

Brief summary of requested changes. *

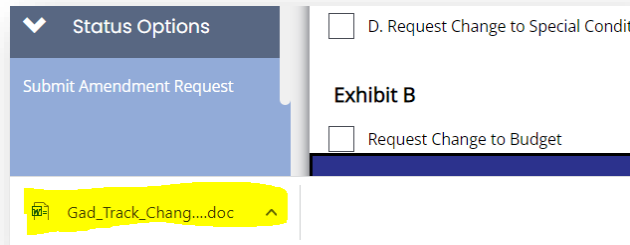
Remove 400 ~~l.f.~~ from the Middle Path Parkway water line. As a result, remove 6 households from the 03J benefit area and 4 households from the 14A benefit area. The remaining beneficiaries will still receive the intended first time water service.

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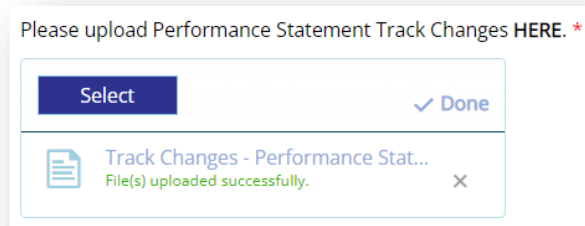
NOTE: A clear summarization of what you are requesting and a detailed explanation of why will help prevent delays in processing.

B. Upload the Performance Statement Track Changes.

Use the “click HERE” link to generate a copy of the Performance Statement. Your web browser will most likely show the Word doc download at the bottom of your screen.

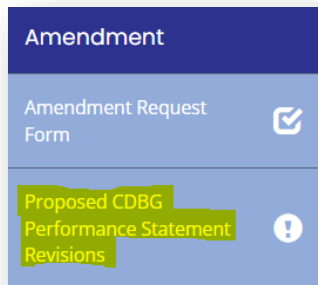


Open it, enable track changes, make the needed changes then save as “Track Changes – Performance Statement – [agreement number]”. Now upload that document where indicated.



C. Complete the Proposed CDBG Performance Statement Revisions page.

All questions are required. See Ch. 11 of the Implementation Manual for more information.



Proposed CDBG Performance Statement Revisions

Instructions:

Please complete this page and press the save button.
Required fields are marked with an *

Amendment #

For additional information and guidance, see TxCDBG Project Implementation Manual Chapter 11

Review Questions

1. Does this Amendment meet the threshold to be considered a Significant Amendment?

No, this request qualifies as a Minor Amendment.

Yes, citizen participation requirements have been met.

2. Do the proposed revisions change the project beneficiaries? *

NOTE: Use the table below to help answer Question 1.

Is This a Minor Amendment?	
<p>Will the project as requested serve substantially the same beneficiaries as the current Performance Statement?</p> <ul style="list-style-type: none"> <input type="checkbox"/> no change in beneficiaries, regardless of quantities; <input type="checkbox"/> increase in beneficiaries, but no new Benefit Area; or <input type="checkbox"/> decrease in beneficiaries of less than or equal to 25%—based on number of persons or households. <p>AND</p> <ul style="list-style-type: none"> <input type="checkbox"/> does not removal of a section of the project to create two or more non-contiguous Benefit Areas. 	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Are the activities' categories the same as the current Performance Statement?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Does the project still solve the same problem identified in the current Performance Statement?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p><i>If the answer to all three questions is Yes, respond "No" to Question 1 on the Proposed CDBG Performance Statement Revisions page</i></p> <p><i>If the answer to any question is No, public participation is required.</i></p>	

D. Complete the Environmental Review Re-Evaluation, if necessary.

Navigate to the existing Environmental Review Performance Report, Environmental Review Re-evaluation page. Complete the form and save the page.



Environmental Review – Re-evaluation

Instructions:

Please complete the page and press the save button.
Required fields are marked with an *

Amendment Number:

Describe the project revisions that require re-evaluation

A re-evaluation is required because of:

- Changes in the nature, magnitude or extent of the project, including adding new activities not anticipated in the original scope of the project.
- New circumstances and environmental conditions which may affect the project or have a bearing on its impact.
- Proposed selection of an alternative not in the original finding.

NOTE: See Ch. 11 of the Implementation Manual for more information.

Amending the Timeline

A. Complete the required fields.

Provide a proposed end date, describe the extenuating circumstances that necessitate the amendment, and describe the steps being taken to complete the project by the proposed date.

C. Request Change to Timeline

	Current Date	Proposed Date *
Grant Contract Period Ends:	09/30/2023	<input type="text"/>

Attention

Total number of extensions requested to date for this project, including this one: 0

Describe the extenuating circumstances beyond the control of the Grant Recipient that will prevent completion of the project within the current contract period. If a previous extension has been approved, the explanation must address extenuating circumstances since the previous extension request was submitted. *

0 of 4000

Describe intermediate steps necessary to complete the project by the proposed date: *

Amending with a Special Condition

A. Describe in detail the desired condition.

D. Request Change to Special Condition

Amendment Special Condition *

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Amending the Budget

A. Check the box under Exhibit B then complete the "Requested Change" column.

Enter positive numbers in the row for budget item requested to be increased; enter negative numbers for the budget item proposed to be decreased.

Exhibit B

Request Change to Budget

Cost Category	Current Agreement Amount	Requested Change *	Proposed Amount	Change as Percent of Total
03J	\$60,000.00	\$ 0.00	\$60,000.00	0.00 %
Admin	\$35,000.00	\$ 3,500.00	\$38,500.00	10.00 %
Engineering	\$150,000.00	\$ -3,500.00	\$146,500.00	-2.33 %
<input type="text" value="v"/>	\$0.00	\$ 0.00	\$0.00	0.00 %
Total	\$245,000.00	\$0.00	\$245,000.00	0.00 %

6. Upload additional supporting documents.

Additional Supporting Documents

Description

Upload

Drag Files Here

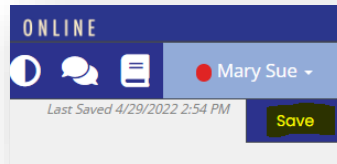


A summary of revisions made by TDA staff will appear here if necessary.

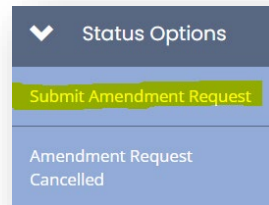
This amendment has been revised by TDA staff prior to recommending for approval, summary of changes:

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7. Click Save in the upper right corner.



8. Click “Submit Amendment Request” under Status Options



Amendment Certification

Each amendment must be approved by TDA staff and the TxCDBG Director(s).

During the review process, TDA staff may request clarification, revisions, or additional justification.

Minor Amendments

Minor amendments, if approved, require no additional action by the Grant Recipient to become effective. The people assigned as Authorized Official, Project Director, and Consultant will receive an email notification of the approval, and the status of the grant will be returned to Grant Executed.

Full Amendments

Full amendments, if approved, require the amendment document to be executed by both the Grant Recipient and TDA executive staff.

- Once notified by email that the amendment is ready to execute, the Authorized Official must navigate to the Amendment Certification Form.
- Click the link to generate the Grant Amendment for review. Check the signature box and save the form to execute the amendment.
- Change the status of the grant to Amendment Pending TDA Signature.
- A second email will be sent to the project team when the grant amendment is fully executed.