HHS Accelerator:
Navigating Contracts, Budgets and Amendments
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Introduction to HHS Accelerator and Financials

The Health and Human Services (HHS) Accelerator System is the City’s online system to simplify and speed the contract process for health and human services providers that deliver services directly to clients and communities. Through a collaborative process with providers, redundant paper-based requirements were removed, processes reengineered, and contract documents standardized – freeing up resources for mission-focused activities.

Agencies now release all Health and Human Services Request for Proposals (RFP) through the HHS Accelerator System. Prequalified providers approved for relevant Services are “Eligible to Propose” and can submit proposals after procurements are released.

The HHS Accelerator System also has the functionality to manage financials electronically. Providers can manage budgets, invoices and payments in the system. HHS Accelerator Financials enables a paperless process and facilitates increased accuracy in accounting.

The City of New York is phasing in the use of this module and participating organizations will receive notification when it is time to use HHS Accelerator Financials.

HHS Accelerator Financials standardizes financials for health and human services contracts across the eleven participating Agencies. The system provides:

- A standard budget template
- A common interface for City Agencies and Providers to conduct budget transactions
- Agencies use the same process to configure/modify/amend budgets, invoices and payments
- A more holistic picture of contract data and financials for HHS Accelerator Agencies.

Financials on the Provider Homepage

After logging in, the first page that you will encounter is the Provider Homepage.

Below the main buttons and navigation icons is a dashboard that gives an overview of the Document Vault, Alerts, Application (status), Procurements, Financials, Documents Shared with your Organization and NYC.ID Account Maintenance. From the homepage, your organizations can use the financial links on the dashboard to access key financial functions, or can use the main Financials tab at the top of the page.

⚠️ When you log into the HHS Accelerator System, at first it will appear as if procurement and financial statistics are unavailable. In order to see the tasks and statistics, you must press the refresh icon, located on the solid blue band.
a. Select the “Financials” tab to access the HHS Accelerator Financials.
b. Contracts pending registration for your organization are listed.
c. Active budgets for your organization are listed.
d. Budgets pending submission for your organization are listed.
e. Budgets pending approval by the funding Agency.
f. Budgets returned for revision that your organization needs to address.
g. Modifications and Updates pending submission by your organization.
h. Modifications and Updates pending approval by the funding Agency.
i. Modifications and Updates returned for revision by the funding Agency.
j. Invoices pending submission by your organization.
k. Invoices pending approval by the funding Agency.
l. Invoices returned for revisions by an Agency.
Monitoring the Status of a Contract

View Contracts Listed in HHS Accelerator
The Contract List is located in the Financials section of the HHS Accelerator System. To access the Contract List, click the Financials tab. The Contract List displays your organization's CCS contracts that are managed in HHS Accelerator Financials. Contracts will be added to the system over a period of time.

![Image of HHS Accelerator System](image-url)

**a.** Click Financials to access the Contract List.

**b.** Click on the Contract List tab to access the Contract List.

**c.** Click on the Filter Contracts button to change which contracts are displayed.

**d.** Shows number of contracts and total value of Active Contracts in the system for your organization.

**e.** Procurement/Contract Title.

**f.** Agency that oversees the contract.

**g.** Contract Number (CT#).
h. Contract Value ($) of each contract.

i. Date of Last Update of the contract information.

j. The Status of the contract. Statuses include Pending Registration, Registered, Suspended, Cancelled, and Closed.

If one of your organization’s contracts is amended by the issuing Agency, a red exclamation icon will appear next to the contract. This symbol alerts your organization that an action is required. Your organization will need to update its budget for the contract to match the amended contract value.

- For a positive amendment, once your revised budget is approved and registered by the Agency, the red exclamation icon will disappear, and the Contract Value ($) listed on the Contract list will adjust to reflect the new amended value of the contract.
- For a negative amendment, once your revised budget is approved by the Agency, the red exclamation icon will disappear, and the Contract Value ($) listed on the Contract list will adjust to reflect the new amended value of the contract.

Your organization can use the Amendment List to track the contract amendment.
Stages of a Contract

All contracts with a status of Pending Registration, Registered and Suspended, are visible on the Contract List. Contracts that are closed or cancelled do not appear on the contract list by default, but your organization can access them by using the “Filter Contracts” feature. The following descriptions define the life cycle of contracts in the system.

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Status</td>
<td>Pending Registration</td>
<td>The Agency has completed the required actions and the contract is pending registration.</td>
</tr>
<tr>
<td></td>
<td>Registered</td>
<td>The contract has been registered. Invoicing and payments can begin.</td>
</tr>
<tr>
<td></td>
<td>Suspended</td>
<td>The Agency has suspended the contract.</td>
</tr>
<tr>
<td></td>
<td>Closed</td>
<td>The Agency has closed the contract. Once a contract is closed, invoices can no longer be submitted by your organization.</td>
</tr>
<tr>
<td></td>
<td>Cancelled</td>
<td>The award has been cancelled by the Agency.</td>
</tr>
<tr>
<td>Contract Amendment Status</td>
<td>Pending Registration</td>
<td>The Agency has amended the contract. “Pending Amendment” flag will be visible on the Contract list.</td>
</tr>
<tr>
<td></td>
<td>Registered</td>
<td>The contract has been registered with updated details. Invoicing and payments can begin.</td>
</tr>
<tr>
<td></td>
<td>Cancelled</td>
<td>The Agency has cancelled the contract amendment.</td>
</tr>
</tbody>
</table>
Filter Contracts

Filtering allows you to target your search and quickly modify contracts displayed on the Contract List.

After you click the “Filter Contracts” button, the filter menu displays with a number of options for modifying displayed contracts. By default, all Active Contract Statuses are checked.

To adjust your filtered options, you must uncheck relevant boxes.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>a.</strong></td>
<td>Contract Value From ($) allows your organization to filter contracts by a contract value range.</td>
</tr>
<tr>
<td><strong>b.</strong></td>
<td>Status indicates the current status of the contract. Your organization can select any status. Cancelled and Closed status can only be selected from the filter options section.</td>
</tr>
<tr>
<td><strong>c.</strong></td>
<td>Contract Term From allows your organization to view contracts that fall into a defined date range.</td>
</tr>
</tbody>
</table>
View your Organization’s Budgets
For listed contracts, your organization will use the HHS Accelerator System to submit a budget, request an assignment, request an advance, and modify the budget.

A budget needs to be created for each contract that your organization holds. Your organization will be notified by email that it is time to input the budget in the system which, once completed, you will submit to the Agency for review. The Agency will receive a notification that the budget was submitted and begin the approval process.

Your organization cannot begin invoicing until the contract is registered, the service period has started, and the budget has been approved by the Agency.

Accessing the Budget List
The Budget List allows you to view budgets, request an advance, initiate a budget modification and submit an invoice.

The Budget List, located in the Financials section of the HHS Accelerator System, is accessed by clicking the Financials tab, then clicking the Budget List tab. The Budget List displays your organization’s Health and Human Services budgets that are managed in the system.

From the Budget List tab, your organization can submit, view, and modify a budget, as well as request an advance.
a. Click on the Budget List tab to access the Budget List.

b. Click on the Filter Budgets button to change which budgets are displayed.

c. Number of budgets displayed based on applied filters.

d. Each Procurement/Contract Title is displayed.

e. Contracting Agency is listed.

f. Fiscal Year of budget.

g. Budget Value ($) for the Fiscal Year for each budget.

h. Date of Last Update of the budget information.

i. This section displays the Status of the budget. Statuses include Pending Submission, Pending Approval, Returned for Revisions, Approved, Active, Closed, Suspended, and Cancelled.

j. This section displays Actions that can be taken with the budget. Depending on the status of the budget, these include View Budget, Submit Invoice, Modify Budget, and Request Advance.
**Status of a Budget**

All budgets with a status of Pending Submission, Pending Approval, Returned for Revision, Approved or Active, are visible on the Budget List. Budgets that are Suspended, Closed or Cancelled do not appear on the budget list by default, but your organization can access them by using the Filter Budgets feature in the system.

Note: The terms Contract Budget and Budget are used interchangeably. The following descriptions define the life cycle of budgets in the system.

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Budget Status</td>
<td>Pending Submission</td>
<td>A budget can be viewed or submitted.</td>
</tr>
<tr>
<td></td>
<td>Pending Approval</td>
<td>Your organization has submitted the Contract Budget and is waiting for Approval from the Agency.</td>
</tr>
<tr>
<td></td>
<td>Returned for Revision</td>
<td>The Agency has returned the Contract Budget to your organization to revise and resubmit.</td>
</tr>
<tr>
<td></td>
<td>Approved</td>
<td>The Agency has approved the budget and the contract is pending registration with the NYC Comptroller’s Office.</td>
</tr>
<tr>
<td></td>
<td>Active</td>
<td>The contract is registered and you can view the budget, submit an invoice, modify the budget and request an advance.</td>
</tr>
<tr>
<td></td>
<td>Cancelled</td>
<td>The Agency has cancelled the contract. No action necessary.</td>
</tr>
<tr>
<td></td>
<td>Suspended</td>
<td>The Agency has suspended the contract. No action necessary.</td>
</tr>
<tr>
<td></td>
<td>Closed</td>
<td>The Agency has closed the contract. No action necessary.</td>
</tr>
</tbody>
</table>
Filter Budgets
Filtering allows you to target your search and quickly modify budgets displayed in the Budget List.

After you click the “Filter Budgets” button, the filter menu displays a number of options for modifying displayed budgets. By default, all Active Budget Statuses are checked.

To adjust your filtered options, you must uncheck relevant boxes.

You may also filter by Agency, CT#, Budget Value ($), and Date of Last Update.

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a.</td>
<td>Budget Types include Amendment, Modification, Update, and Contract.</td>
</tr>
<tr>
<td>b.</td>
<td>Status indicates the current status of the budget. Your organization can select Closed, Suspended or Cancelled budgets from this section.</td>
</tr>
<tr>
<td>c.</td>
<td>Fiscal Year allows your organization to view contracts that fall into a defined date range.</td>
</tr>
</tbody>
</table>
Submit a Contract Budget
Your organization can create a budget following the steps below.

1. Click on the “Refresh” icon in the financials section of the homepage.

2. Click on the number hyperlink for “Budgets Pending Submission.”

3. To start a new budget select “View Budget” from the Action drop down menu.
Review the details in the Contract Information and Fiscal Year Budget sections.

4. Next, click on the first blue header just below the Fiscal Year Budget information grid.
Each tab on the budget is accessible and may be completed at any time. All tabs may not display for your budget. Agencies choose which tabs are used for your budget and may provide instructions on which tabs to fill out.

Budget information is entered in each tab. The Budget Summary summarizes the total of all direct and indirect costs. Tabs for all budget sections are visible at the top of the budget summary section.

5. Click “Add Site” and add the site location where services are delivered.

6. Next, click on the “Personnel Services” tab.

To view details on how the budget is broken down, view each individual tab.

The Service Site Information requested on the bottom of the Budget Summary Tab is a required field. If there are multiple locations for the contract, enter the address for the primary location. If services are not geographically based, use the address of the administrative office.
The default for the Personnel Services is $0.00 in all fields.

Total Salary indicates the total cost of all employees; Full time employees (FTEs) (35 hours or more per week), part-time employees and seasonal employees.

Total Fringe indicates total cost of fringe associated with employees. Fringe benefits must include FICA. This may also include unemployment insurance, worker’s compensation, disability, pension, life insurance and medical coverage as per your policies.

7. Click on the “+” symbol next to the Salaried Employees Total row to expand the grid.

8. Add a new row by clicking “+Add” in the footer of the grid.

9. Next, click on the “Salaried Employees” drop-down menu.
10. Select the “Title” that best corresponds to the Salaried Employee that your organization is adding to the budget.

<table>
<thead>
<tr>
<th>Title</th>
<th># of FTEs</th>
<th>FY Budget</th>
<th>YTD Invoiced Amount</th>
<th>Remaining Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Manager</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Accountant (606)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Accountant/Bookkeeper (703)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Actor</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Administrative Assistant (612)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Administrator</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>After School Program Director</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>ART Specialist/Arts Partner</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assessment/Intake (SED Only) (251)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Bookkeeper</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Cook/Meal Preparer</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Coordinator</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Corporation Counsel/Senior Counsel</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Director</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Executive Director (002)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Manager</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Mental Hygiene Director (702)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Principal (SED Only) (515)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Program Director (502)</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Fringe</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Assistant Vice President</td>
<td>0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
11. Enter the number of full-time employees in this title (# of FTEs).

12. Click “Save.”

Repeat steps to enter additional Salaried Employees, Hourly Employees, and Seasonal Employees to the yearly budget.
13. Double click and enter a value in the “FY Budget” box.

14. Click “Save.”
The Total Fringe percentage calculates automatically.

There are two types of comments your organization can submit with the budget: Tab Level Comment, and General Overall Comments.

Each Budget tab has a Tab Level comment field.

15. To leave a Personnel Services tab level comment, click “Tab Comments.”
16. Complete the **Tab Comments** box and click **Save.**

![Budget Summary form](image)

<table>
<thead>
<tr>
<th>Tab Comments</th>
<th>View Comments History</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter any comments:</td>
<td>Click the 'Save' button above to save your comments.</td>
</tr>
<tr>
<td>Please see the fringe justification document for a breakdown of the $20,000.00.</td>
<td>Also, the case manager row groups all levels of case managers on the website.</td>
</tr>
</tbody>
</table>
17. Next click on the “Documents” header to open the documents widget.

For this example, you will upload a document. The Documents feature allows Providers to attach and submit supplementary information with the budget.

18. Click on the “Upload New Document” button.
19. Select the “Document Type.”

20. Click the “Browse” button and select the document.

21. Enter the “Document Name.”

22. Click “Next.”

23. Click “Upload Document.”

A green message bar will appear that the document uploaded successfully.

Operations & Support and Equipment includes Supplies that are not lasting or permanent in nature, such as office, program and/or maintenance supplies. The rental, lease, repair and maintenance of office/programmatic equipment utilized in the program’s operation.

25. Click on the “+” symbol next to the Operations and Support Total row to expand the grid.
26. Double click and enter a value in the “FY Budget” box and click “Enter” to save.

Repeat steps to budget for additional Operations and Support items.

27. Next, click “Utilities.”

The Total Operations, Support and Equipment will appear in the top section of the tab.
Utilities relate to costs such as electricity, water, gas and telecommunications.

28. Click on the “+” symbol next to the Utilities row to expand the grid.

29. Double click and (if applicable) enter a value in the “Invoice Amount” box, and then click “Save.”

For example purposes, the screens going forward will have the content filled in. In the real world, when you double click, the box will turn yellow.

30. Next, click the “Professional Services” tab.

Professional Services costs are associated with independent entities with professional or technical skills, such as accounting or legal services, that support vendor operations.

31. Next, click “Rent.”
Rent and Occupancy includes all rent paid by a program for all sites utilized by that program. It also includes all related charges associated with the use of the site, such as minor repairs and maintenance costs.

32. Click on the “+” symbol next to the Rent row to expand the grid.

33. Click “+Add.”

34. Enter Rent information.

35. Click “Save.”

36. Next, click the “Contracted Services” tab.
Contracted Services costs are associated with independent entities with professional or technical skills retained to perform specific tasks or complete projects related to the program that cannot be accomplished by regular staff. Also, independent (usually non-profit) entities retained to perform program services.

37. Next, click on the “Rate” tab.

Rate based cost indicate the unit rate and number of units of service associated with the program.

38. Click on the “+” symbol next to the Rate row to expand the grid and enter the rate information.

39. Next, click on the “Milestone” tab.
Milestone costs are typically an achievement set forth in the Request for Proposals (RFP). When a milestone is complete, and an invoice is submitted, the Agency will make a payment.

40. Click on the “Unallocated Funds” tab.

Unallocated Funds are not frequently used, and usually at the request of the Agency. This tab would be used to budget funds that cannot be allocated elsewhere on the budget.

41. Click on the “Indirect Rate” tab.

Indirect Rate costs are related to administrative overhead incurred by a provider operating several programs. Please review Agency fiscal manuals for guidance on maximum allowable indirect rates.

Typically an overhead rate must be substantiated by an organization’s Audited Financial Statement.

42. Next, click on the “Program Income” tab.
Program Income is used to list income the program receives. This could be client fees or contributions, earned revenue, In-Kind contributions, private match, or grant funds to support the program.

In the budget, your organization anticipated what the Program Income would be. For each invoice that your organization submits, input the actual amount of funds raised.

43. Next, click on the “Budget Summary” tab.

From the Budget Summary tab, the overall budget is displayed.

A budget cannot be submitted until it adds up to the total budget amount.

44. To review additional details about the budget breakdown, click on the “+” symbol next to the Total City Funded Budget row to expand the grid.

If you want to write a General comment to the Agency, you can complete the comment box below and click Save.
45. After reviewing the budget, click "Submit."
Once your budget has been submitted, the Budget Status will change to Pending Approval.

The issuing Agency will approve the budget or return it for revision. You will receive notifications and alerts, in the system and in your email inbox, if actions are required by your organization.

When a budget is in Pending Approval status, you will not be able to make changes to the budget. If an agency needs you to modify the budget they will return the invoice for revisions. See page 35 for details.

46. Select the box to indicate that you agree to submit the Budget to the Agency for review.

47. Enter your “User Name” and “Password” as your signature.

48. Click “Yes, submit this Budget” at the bottom of the screen.

A green message bar will confirm that your budget was successfully submitted and will be reviewed by the Agency.
Print a Budget
You have the ability to print a budget in any status. To print a budget, navigate to the budget you 
would like to print and follow the steps below.

1. Click the “Print Budget” icon on the top right of the screen.

2. A new tab will open in your browser. Next, click on the first blue 
header just below the Fiscal Year Budget information grid to 
expand the display.

What is displayed on the screen is what will print.
The entire budget will appear on the page. Select the keyboard command "Ctrl+P" to print the budget.

You have the option of collapsing sections of the budget that you don’t want to print. Click the (-) next to the Bolded Text.
**Revise a Budget**

If your budget is returned for revisions, your organization must make the appropriate revisions and resubmit the budget.

1. Please note that each time you sign in, click on the “Refresh” icon in the Financials section of the homepage.

2. Click on the number hyperlink for “Budgets Returned for Revision.”

3. Select “View Budget” from the Action drop down menu for the budget you would like to view.
4. Click “View Comments History” to see why the Agency returned the budget for revisions.

5. Review the Agency comments on the budget.

In this example, Agency comments request revisions for “Personnel Services” and part-time employees. Review comments thoroughly and then proceed to edit budget details in the appropriate tab(s).

6. Click on the first blue bar to expand the “Budget Summary” section.
7. Then, click on the “Personnel Services” tab.

8. Click on the “+” symbol next to Salaried Employees Total.
9. Click on the existing row of the Salaried Employee to activate it and click "Delete."

10. Click "Yes" to the pop-up asking "Are you sure you want to delete this row?"
11. Click on the “+” symbol next to the Hourly Employees Total row.

12. Click the “+Add” link in the footer of the Hourly Employee Total.

13. Select the “Employee Title,” enter the “Hours/Year” and the “FY Budget $.”

14. Click “Save.”

Repeat steps to add the other 4 hourly employees to the budget.
15. Once all of the revisions have been completed, click “Submit.”

16. Select the box to indicate that you agree to submit the Budget to the Agency for review.

17. Enter your “User Name” and “Password” as your signature.

18. Click “Yes, submit this Budget” at the bottom of the screen.
A green message bar will confirm that your budget was successfully submitted and will be reviewed by the Agency.

Once the budget is approved by the Agency, and the contract has started, your organization can start submitting invoices.
Request an Advance

If the funding Agency allows for advances in its policy, your organization can make the request from the Budget List. An advance comes to your organization as a lump sum. The advance does not come from a specific line item of a budget.

When the advance is approved, the Agency will establish the process for recouping funds. Your organization will submit invoices normally and a portion of the advance will be taken when each subsequent invoice payment is made in accordance with the Agency’s policy.

Your organization can request an advance by following these steps:

1. Click on the “Refresh” icon in the Financials section of the homepage.
2. Click on the number hyperlink for “Active Budgets.”
3. Select “Request Advance” from the Action drop down menu for the procurement you would like an advance.

4. Enter the “Advance Amount Requested ($).”

5. Enter “Advance Description.”

The advance request description can be up to 50 characters.
6. Click “Request Advance.”

A green message bar will confirm that the Advance Request was submitted.

The Agency will review the request. Your organization will receive a notification with the Agency’s decision.

If the Advance is approved, it will appear on the budget.
Once an advance is approved it will appear on your budget. In the example below, if you click on the blue bar labeled advances, you will be able to view the advance.
Budget Modification

During the course of the contract year, a budget may need to be adjusted. This is done either by a budget modification or a budget amendment.

<table>
<thead>
<tr>
<th>Budget Change</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Modification</td>
<td>A budget modification does not change the value of the contract. If your organization increases the budget in one area, a proportional decrease would need to occur on another line item in the budget.</td>
</tr>
<tr>
<td>Budget Amendment</td>
<td>A contract value can increase or decrease at the discretion of the awarding Agency. The Agency initiates the contract value change in the system. The Agency would make an Amendment to a contract, and your organization would then need to adjust the budget accordingly to match the new contract value.</td>
</tr>
</tbody>
</table>

Making a Budget Modification

A budget modification is initiated by the Provider. Budget modifications are submitted to the Agency when your organization wants to adjust the allocation of expenses on the budget without changing the overall budget value. Once a budget modification is submitted, the funding Agency will receive an alert that a modification has been requested. The Agency will review the budget modification and make a decision.

A budget modification cannot be initiated if there are outstanding invoices, outstanding payments, or negative amendments currently in progress on the contract.
1. Click on the “Financials” tab.

2. Click the “Budget List” tab.
3. Select “Modify Budget” from the Action drop-down list.

4. Click “Create Budget Modification.”
5. Click on the first blue bar to expand the “Budget Summary” section.

6. Click on the “+” Symbol next to the Total City Funded Budget row.
The Budget Summary lists how funds are currently allocated. To modify the budget, reallocate funding among the budget areas as needed. The sum of the changes may not change the overall value of the contract budget.

7. Click the “Personnel Services” tab.
In this example, the distribution of funding for Hourly Employees will be modified. If funds are added to one type of worker, it will need to be taken away from another role. Funds can be redistributed across tabs, as long as the contract value does not change.

8. Click the “+” symbol next to the Hourly Employees Total.

9. Select the row that needs to be adjusted and click “Edit.”

10. Enter the “Modification # Hours/Year” and the “Modification Amount” values. Enter negative quantities if you are adjusting the line item down.
11. Select the next row that needs to be adjusted and click “Edit.”

12. Enter the “Modification # Hours/Year” and the “Modification Amount” values. Enter positive quantities if you are adjusting the line item up.

13. Click “Save.”

Review the allocated personal services to ensure it’s a zero sum change.

14. Click the “Budget Summary” tab.
15. Click “Submit.”

16. Select the box to indicate that you agree to submit this Budget Modification to the Agency for review.

17. Enter your “User Name” and “Password” as your signature.

18. Click “Yes, submit this Modification.”
A green message bar will confirm that your Contract Budget modification was successfully submitted and will be reviewed by the Agency.
Monitoring the Status of an Amendment

View your Organization’s Amendment List
The Amendment List displays your organization’s Health and Human Services contract amendments that have been generated in the system. The Amendment List is located in the Financials section of the HHS Accelerator System. To access the Amendment List, click the Financials tab, then click the Amendment List tab.

A contract amendment occurs when the Agency initiates a contract value change in the system.

![Amendment List](image)

a. Click on the Amendment List tab to access the Amendment List.

b. Click on the Filter Amendment button to change which amendments are displayed.

c. Number of amendments displayed based on applied filters.

d. Procurement/Contract Title is listed.

e. Amendment Title is listed.

f. Amendment EPIN is listed.

g. Amendment Value (s) is listed.

h. Date of Last Update is listed.

i. The status of the amendment is displayed.
## Stages of a Contract Amendment

All contract amendments with a status of Pending Configuration, Pending CoF (Certification of Funds), Pending Submission, Pending Approval, Pending Registration, and Registered, are visible on the Amendment List. Contract amendments that are suspended or cancelled do not appear on the amendment list by default, but your organization can access them by using the "Filter Amendments" feature. The following descriptions define the life cycle of amendments in the system.

<table>
<thead>
<tr>
<th>Status Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Amendment Status</td>
<td>Pending Configuration</td>
<td>The Agency is configuring the contract amendment.</td>
</tr>
<tr>
<td></td>
<td>Pending CoF</td>
<td>The Agency staff is verifying the contract amendment configuration.</td>
</tr>
<tr>
<td></td>
<td>Pending Registration</td>
<td>The Agency has amended the contract. “Pending Amendment” flag will be visible on the Contract list.</td>
</tr>
<tr>
<td></td>
<td>Registered</td>
<td>The contract has been registered with updated details. Invoicing and payments can begin.</td>
</tr>
<tr>
<td></td>
<td>Suspended</td>
<td>The Agency has suspended the contract amendment.</td>
</tr>
<tr>
<td></td>
<td>Cancelled</td>
<td>The Agency has cancelled the contract amendment.</td>
</tr>
</tbody>
</table>
Filter Amendments

Filtering allows you to target your search and quickly modify contract amendments displayed on the Amendment List. After you click the “Filter Amendments” button, the filter menu displays with a number of options for modifying displayed amendments. To adjust your filtered options, you must uncheck relevant boxes.

- **Amendment Value From ($)** allows your organization to filter for contract amendments that fall in a specified range.
- **Status** indicates the current status of the amendments. Your organization can select any status. Suspended and Cancelled status can only be selected from the filter options section.
Contract Amendments

Positive Contract Amendment

The Agency initiates the positive Amendment (contract value change) in the system and your organization would then need to adjust the budget accordingly to match the new contract value.

Your organization will receive an email notification of a positive budget amendment. Your organization will make the adjustment to the budget and submit the Amended budget to the Agency. The Agency will then review and either return or approve the revised Budget.

To view a contract amendment, review the steps below:

1. Click on the “Refresh” icon in the financials section of the homepage.
2. Click on the number hyperlink for “Budgets Pending Submission.”

When a contact is amended by the Agency, the Provider must revise the budget.
The contract that has been amended will have an amendment symbol next to it.

3. Click the “Procurement/Contract Title” blue hyperlink for the contract that has been amended.

4. Next, click on the first blue bar to expand the “Budget Summary” section.
In this example, the contract is increased/amended $20,000 by the Agency. The $20,000 must be allocated in the Budget and resubmitted to the Agency.

5. Click “Personnel Services.”
6. Click on the “+” symbol next to the Hourly Employees Total row.

7. Click “+Add.”

8. Select the “Employee Title” from the drop-down menu.

9. Enter the “Amendment # Hours/Year.”

10. Enter “Amendment Amount.”

11. Click “Save.”
12. Click on the “+” symbol next to Salaried Employees Total row.

13. Click “+Add.”

14. Select the Employee title from the drop-down.

15. Enter the “Amendment # FTEs.”

16. Enter “Amendment Amount.”

17. Click “Save.”
18. Click the “Budget Summary” tab. From the Budget Summary tab, confirm that the updated proposed budget matches the budget amount provided by the Agency (including the Amendment).

19. Click “Submit.”
20. Select the box to indicate that you agree to submit this Budget Amendment to the Agency for review.

21. Enter your “User Name” and “Password” as your signature.

22. Click “Yes, submit this Amendment.”

Once a positive Amended budget is approved, and the new contract value has been registered, the Budget Value ($) on the contract list will adjust accordingly.
Negative Contract Amendment

If the Agency initiates a negative Amendment to the contract, your organization would need to adjust the budget to match the new contract value.

Your organization will receive an email notification of a negative budget amendment. Your organization will make the adjustment to the budget and submit the Amended budget to the Agency. The Agency would then review and return or approve the revised Budget.

To view a negative contract amendment, review the steps below:

1. Click on the “Refresh” icon in the financials section of the homepage.
2. Click on the number hyperlink for “Budgets pending submission.”

When a contract is amended by the Agency the budget must be revised.
The contract that has been amended will have an amendment symbol next to it.

3. Click the “Procurement/Contract Title” blue hyperlink for the contract that has been amended.

4. Click on the first blue bar to expand the “Budget Summary” section.

The Amendment Amount for this contract is negative $10,000.
The budget must be decreased by $10,000 and resubmitted to the Agency. In this example, we’ll adjust rate and rent to account for the decrease.

5. Click the “Rate” tab.

6. Click on the “+” symbol next to the Unit Description row.
7. Click the Unit Description detail row, and then click “Edit.”

8. Enter the “Amendment # Units.”

9. Enter “Amendment Amount.”

The Amendment Amount must be a negative number. It reflects how much this item will be decreased.

10. Click “Save.”

11. Click the “Rent” tab.

12. Click on the “+” symbol next to the Rent row.
13. Click the Rent Description detail row, and then click “Edit.”

14. Enter “Amendment Amount.”

The Amendment Amount must be a negative number. It reflects how much this line item will be decreased.

15. Click “Save.”

16. Click the “Budget Summary” tab.

From the Budget Summary tab, confirm that the updated proposed budget matches the budget amount provided by the Agency (including the Amendment).

17. Click “Submit.”
18. Select the box to indicate that you agree to submit this Budget Amendment to the Agency for review.

19. Enter your “User Name” and “Password” as your signature.

20. Click “Yes, submit this Amendment” at the bottom of the screen.

A green message bar will confirm that your Contract Budget Amendment was successfully submitted and will be reviewed by the Agency.

Once a negative Amended budget is approved, the Budget Value ($) on the contract list will adjust accordingly.