

Configurable Spending Thresholds

Spending Thresholds can help you set financial controls for budgets and payment requests, while improving visibility with in-app notifications. Its flexibility allows configurable limits on how much a grantee can move or spend over their budgeted amounts without requiring a formal amendment. Thresholds can be applied at multiple levels: system settings, budget settings, budget categories, and line items.

The Different Levels:

System Settings - Sets defaults for all Grants

Grant Settings – Sets Thresholds for the Grant

Budget Categories & Line Items - Inherit Thresholds from grant settings, with option to configure locally

How to Set System Threshold Settings

Thresholds can also be set globally. This will take effect for any awards or grants created after the thresholds have been set. Any records created before this will not inherit the settings.

1. Find the **Left Navigation Panel** > click **Administration** > **System Settings** > **Award & Sub-Award**. This is a new section.
2. On the Award & Sub-Awards Setting page, click the **Edit Pencil** in the upper right **Icon Bar**.
3. Scroll down to the **Spending Threshold Defaults** section. > Checkmark the **Enable Spending Thresholds** box.
4. Three types of thresholds will be appear. These are optional and can be set at the **Line Item, Category, and Total Budget** levels.
5. All Threshold settings are optional to use and can be applied on the same budget.

Enable Spending Thresholds

Default Line Item Threshold Amount Percent
Apply: Whichever is First (Lesser)

Default Category Threshold Amount Percent
Apply: Whichever is First (Lesser)

Default Total Budget Threshold Amount Percent
Apply: Whichever is First (Lesser)

- Additional selections can be applied to each Threshold level: Amount and Percent. Both selections can be applied to the Threshold, if preferred.

- Checkmark** the **Amount** box and enter the desired monetary amount for the line item, category, or total budget (e.g. \$1,000).
- Checkmark** the **Percent** field to enter the desired percentage of the line item, category, or total budget. (e.g. 10%).

- When the Amount and Percent fields are both check-marked, an additional dropdown menu appears next to the percentage field. The percentage threshold

can then be applied to either the lesser value of the two fields, or the greater value of the two fields. (e.g. The Line Item's budget is \$10,000 and Whichever is Last (Greater) is selected from the dropdown. If the Amount entered is \$1,000 and the Percent entered is 5%, the Threshold will be applied to the line item's Amount since \$1,000 is greater than 5%.

Whichever is First (Lesser) = the lesser value or least leeway with the threshold

Whichever is Last (Greater) = greater value or more leeway with the threshold

- Once all appropriate fields have been filled, click Save.

How to Enter Spending Thresholds

Budget Settings Level


On an individual Grant, all thresholds settings can be set for the entire budget on one single page. This includes the Line Items, Category, and Total Budget.

- Find the **Left Navigation Panel** > Click **Grant Management** > **Grants** > Select your **Grant** from the **Name** column.
- On the Grant Details page, find the **Post-Award** Tab > Click **Settings** > **Budget Settings**.
- Select the **Edit Pencil** icon in the top right **Icon Bar**.

4. Checkmark the **Spending Thresholds** box under the **Restrictions** section.
5. Three types of thresholds will be appear. These are optional and can be set at the **Line Item**, **Category**, and **Total Budget** levels.
6. See “**How to Enter System Settings**” steps **six through eight** on pages one and two of this guide.

Once all appropriate Thresholds have been configured and set, the budget will show any **Threshold Alerts**. A **banner** will appear above the budget to specify the alert, in addition to a **symbol** indicating the **Alert status**.


- An **Approaching Alert** will show if the actuals are under the threshold but over the budget.
- A **Reached Alert** will show when the actuals equal the Budget + Threshold
- An **Exceeded Alert** will show when the Actuals are greater than the Budget + Threshold.

 **Action Required:** You have exceeded the budget spending threshold(s). An **Amendment** is required.

Expense Budget +	Assignee(s)	Grant-Funded Budgeted	Grant-Funded Actuals	Total Budgeted	Total Actuals	Grant-Funded Remaining	Total Remaining
Construction +							
• Construction		\$10,000.00	\$10,999.00	\$10,000.00	\$10,999.00	(\$999.00) ⓘ	(\$999.00)
Subtotal		\$10,000.00	\$10,999.00	\$10,000.00	\$10,999.00	(\$999.00) ⓘ	(\$999.00)
Supplies +							
All Supplies		\$10,000.00	\$11,000.00	\$10,000.00	\$11,000.00	(\$1,000.00) ⓘ	(\$1,000.00)
• Subtotal		\$10,000.00	\$11,000.00	\$10,000.00	\$11,000.00	(\$1,000.00) ⓘ	(\$1,000.00)
Travel +							
All Travel		\$10,000.00	\$30,000.00	\$10,000.00	\$30,000.00	(\$20,000.00) ⚠	(\$20,000.00)
• Subtotal		\$10,000.00	\$30,000.00	\$10,000.00	\$30,000.00	(\$20,000.00) ⚠	(\$20,000.00)
Total Expense Budget Cost		\$30,000.00	\$51,999.00	\$30,000.00	\$51,999.00	(\$21,999.00) ⓘ	(\$21,999.00)
Revenue Budget							
Grant Funding							
Awarded Amount		\$50,000.00	\$50,000.00	\$50,000.00	\$50,000.00		

The symbols are an additional alert:

- **Approaching/Reached** = Circle
- **Exceeded** = Triangle



(\$999.00) ⓘ	(\$999.00)
(\$999.00)	(\$999.00)
(\$1,000.00) ⓘ	(\$1,000.00)
(\$1,000.00)	(\$1,000.00)
(\$20,000.00) ⚠	(\$20,000.00)
(\$20,000.00)	(\$20,000.00)
(\$21,999.00) ⓘ	(\$21,999.00)

Category Level

1. On the **Grant Details** page, navigate to the **Post-Award** Tab > Click **Settings** > **Budget Settings**.
2. Select the **Edit Pencil** icon next to the preferred **Budget Category**

3. **Checkmark** the **Spending Thresholds** box under the **Restrictions** section.
4. See “**How to Enter System Settings**” steps **six through eight** on pages one and two of this guide to complete the setting for the Category Threshold.
5. Click Save.

Line-Item Level

On an individual Grant, each line item in the budget can have thresholds settings individually applied.

1. On the **Grant Details** page, navigate to the **Post-Award** Tab > Click **Settings** > **Budget Settings**.
2. Select the **Edit Pencil** icon next to the preferred **Line Item**.
3. On the **Budget Item** window, select the **Configuration** tab.

Hint: This is the only setting that uses the Budget Item Window and Configuration Tab.

4. **Checkmark** the **Spending Thresholds** box under the **Restrictions** section.
5. See “**How to Enter System Settings**” steps **six through eight** on pages one and two of this guide to complete the setting for the Category Threshold.
6. Click Save.

Budget Amendment Options

Note 1: Recipients can edit the budget, but they must be given approval by the funder. If approval is not provided, sub-recipients are given view only access. There are two ways to adjust the budget.

- Submit a Budget Amendment via the link on the banner or through the navigational steps.
- Manually adjust the budget. Either the funder or recipient can check if the settings are appropriate under Post-Award> Budget Settings.

Note 2: Sub-recipients can submit Expenses and Payment Requests even if these surpassed the Threshold. The funder will not be able to approve the Payment Request until the Budget is revised.

For more information on Spending Thresholds, visit the support site or reach out to your Euna Grants Customer Success Manager.