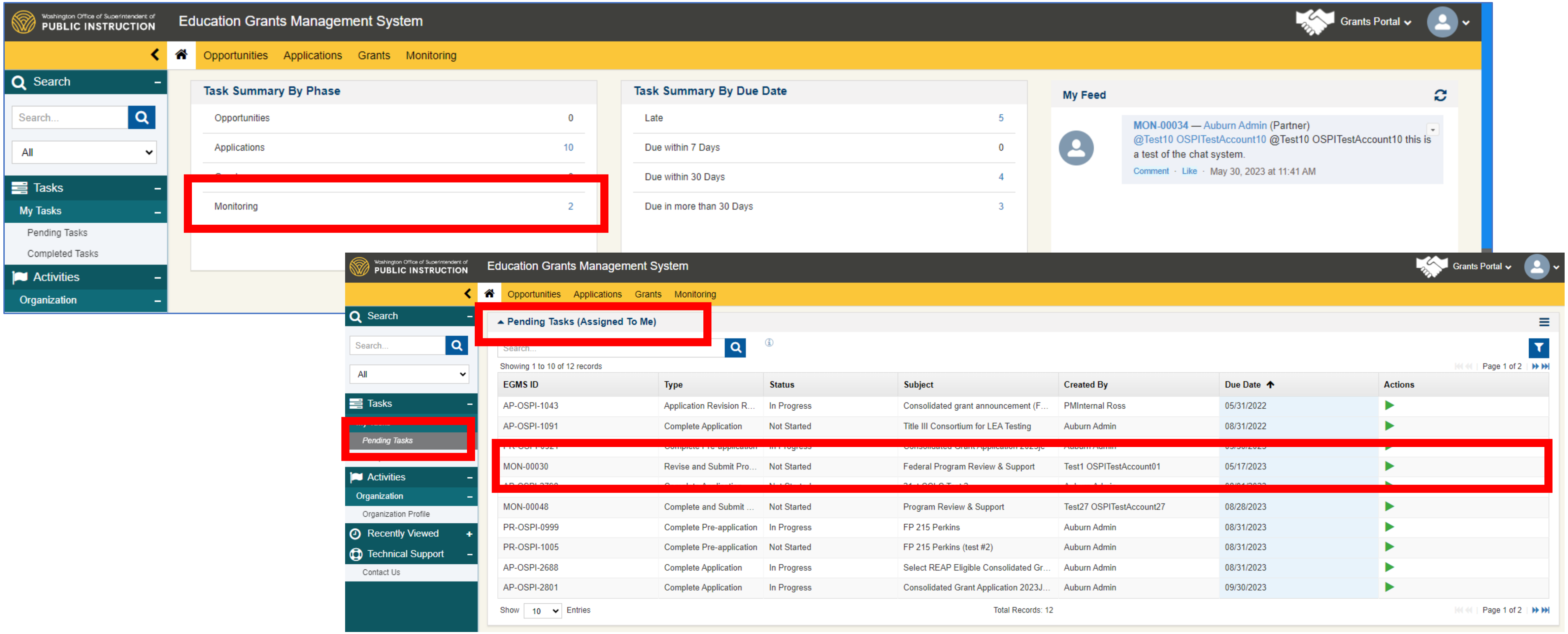
EGMS: Program Reviews

Organizations and LEAs

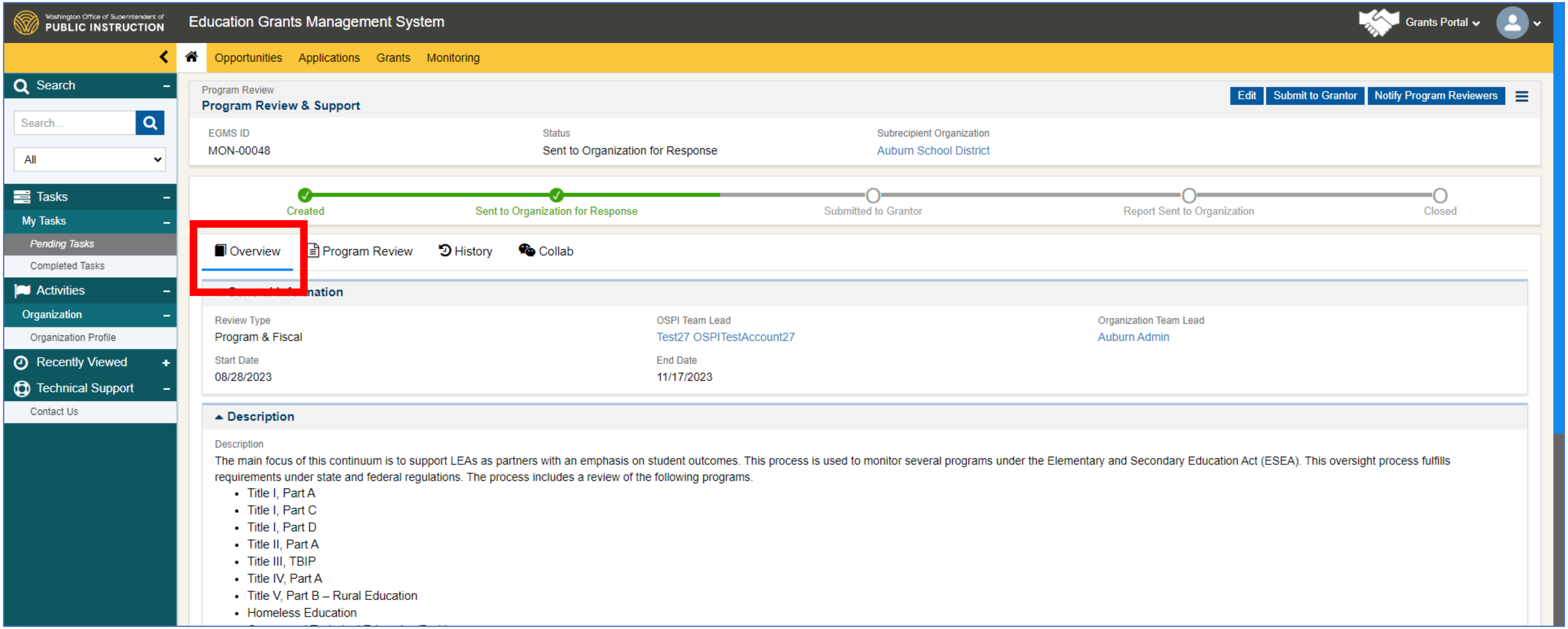
Part 1: Providing Initial Responses

Subrecipient access to Program Reviews



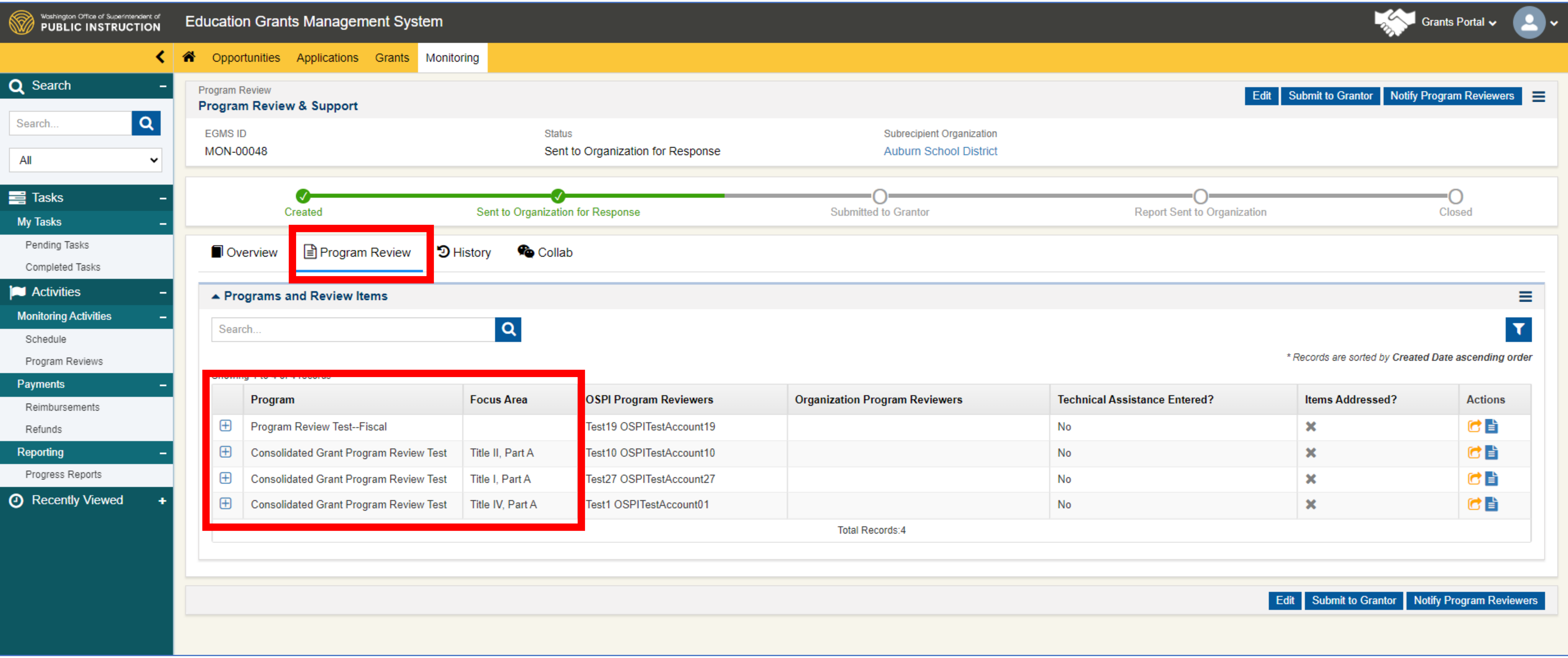
- ❑ The Subrecipient Organization can see an additional Monitoring task was assigned on the dashboard.
- ❑ In the Pending Tasks page, the Subrecipient can see the Monitoring Task on the "Assigned to Me" section.
- ❑ The Subrecipient can click on the green triangle (action button) to open the Review or access it through the Monitoring tab.

Overview Tab



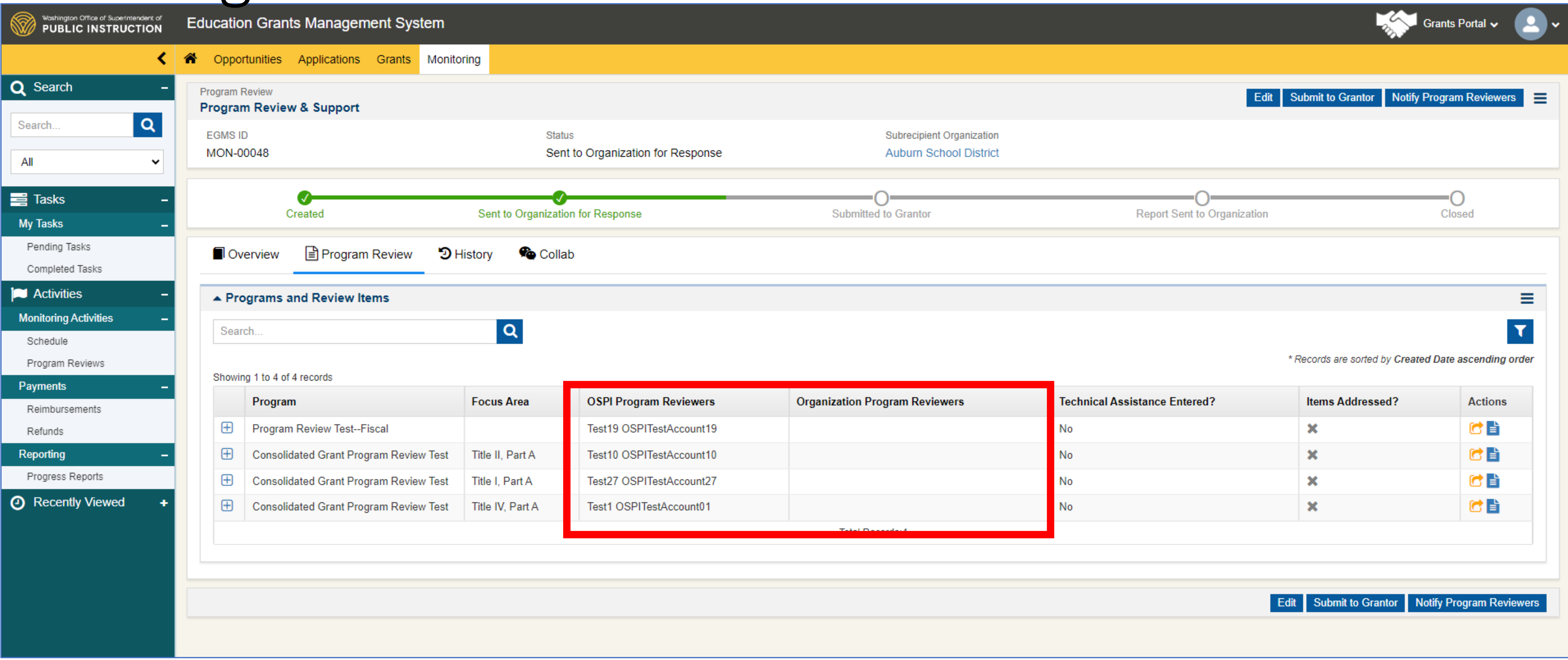
- ❑ When the Program Review is opened the first time, the Overview tab is displayed.
- ❑ This tab has general information about your Review.
- ❑ No actions needed on this tab.

Program Review Tab



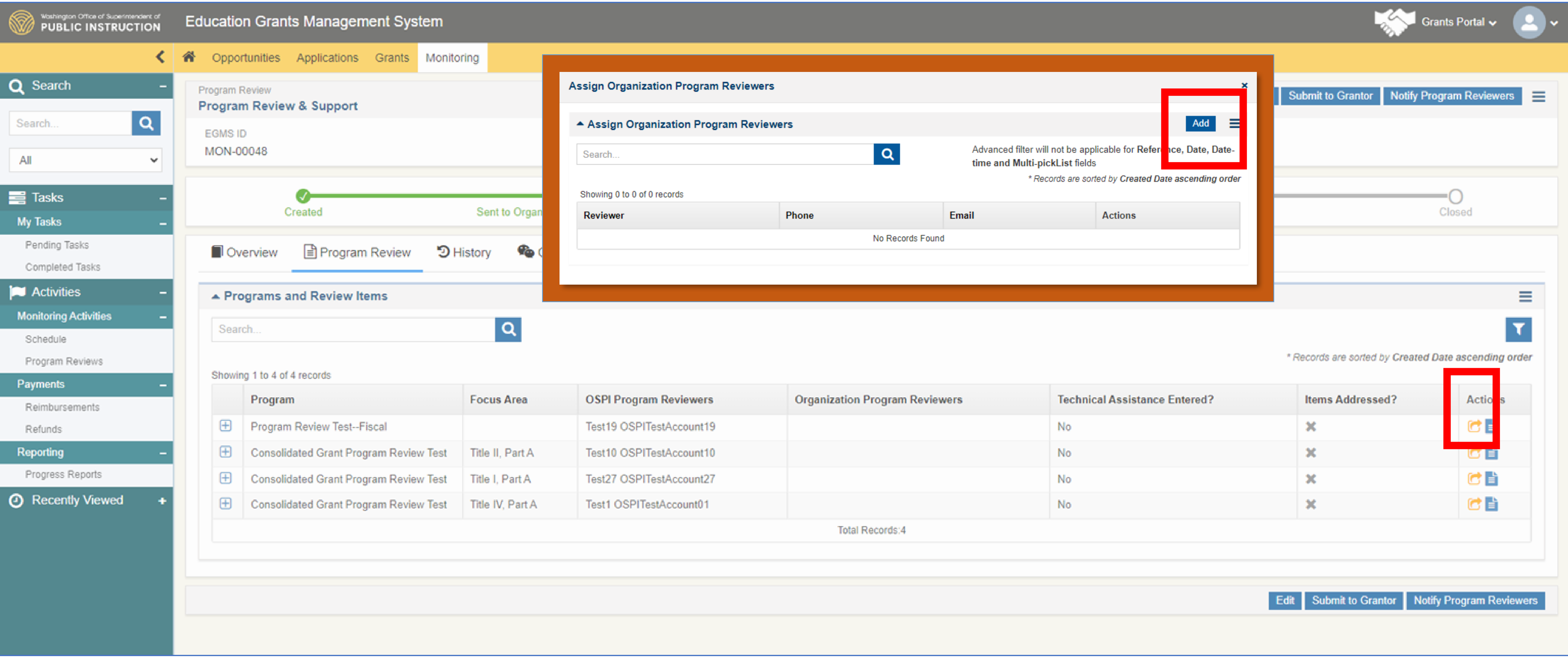
- This tab includes all the Program Checklists and is where you will respond to the checklist items.
- Each row of the table pertains to a single Program. **Program** and **Focus Area** columns contain the name of the Program.
- Use the to expand each row to see the checklist items.

Program Review Tab



- ❑ The **OSPI Program Reviewers** column contains the OSPI staff who will Review that Program.
- ❑ The **Organization Program Reviewers** are those the Organization Team Lead assigns to each Program. *Only the Team Lead can assign staff to the Programs.*

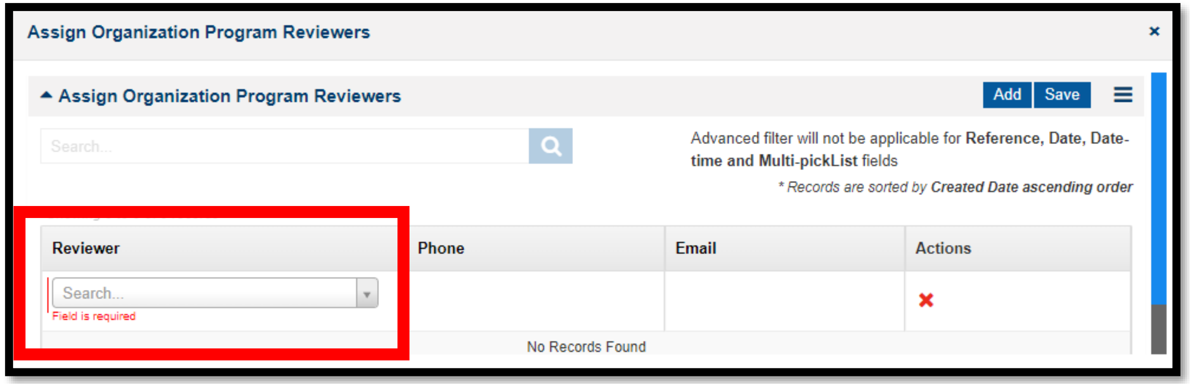
Assign Organization Program Reviewers



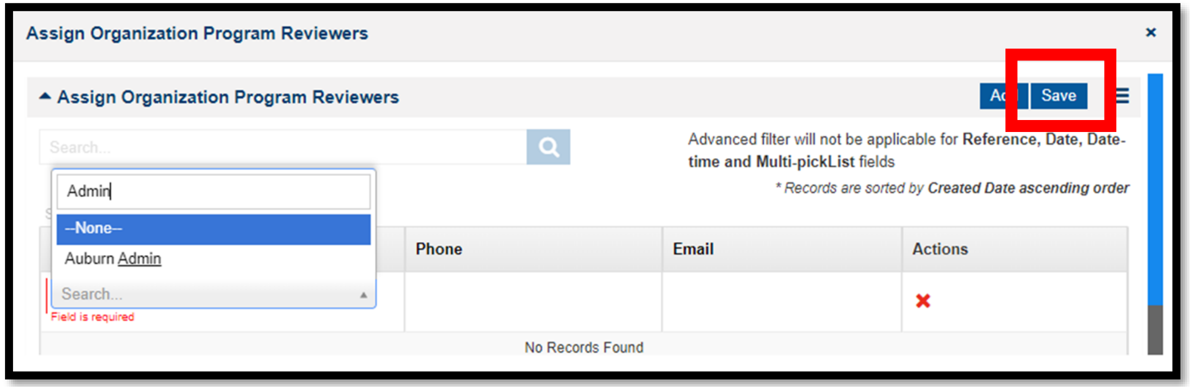
- ❑ Click on [icon] to assign a user to that program. Only the Team Lead and this user can edit this Program Checklist.
- ❑ In the pop-up window click **Add**

Assign Organization Program Reviewers

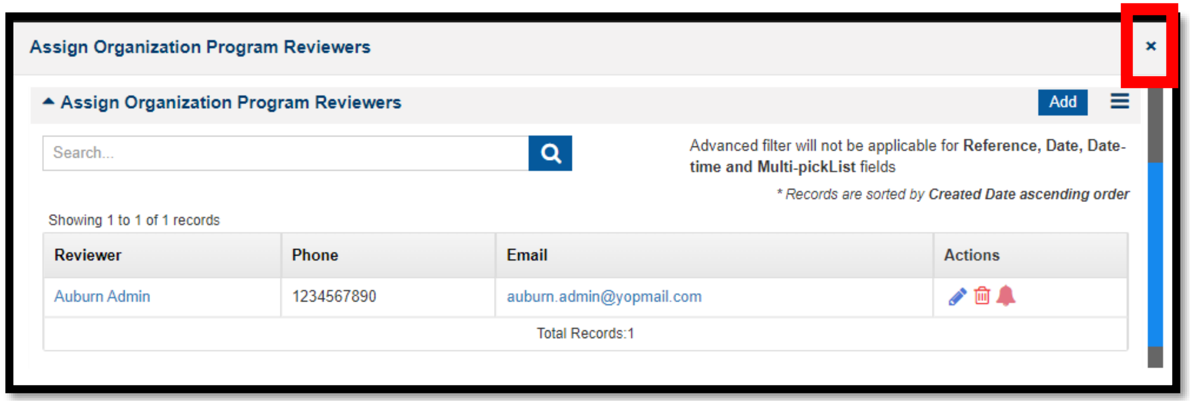
- ❑ Begin typing in the **Search field**



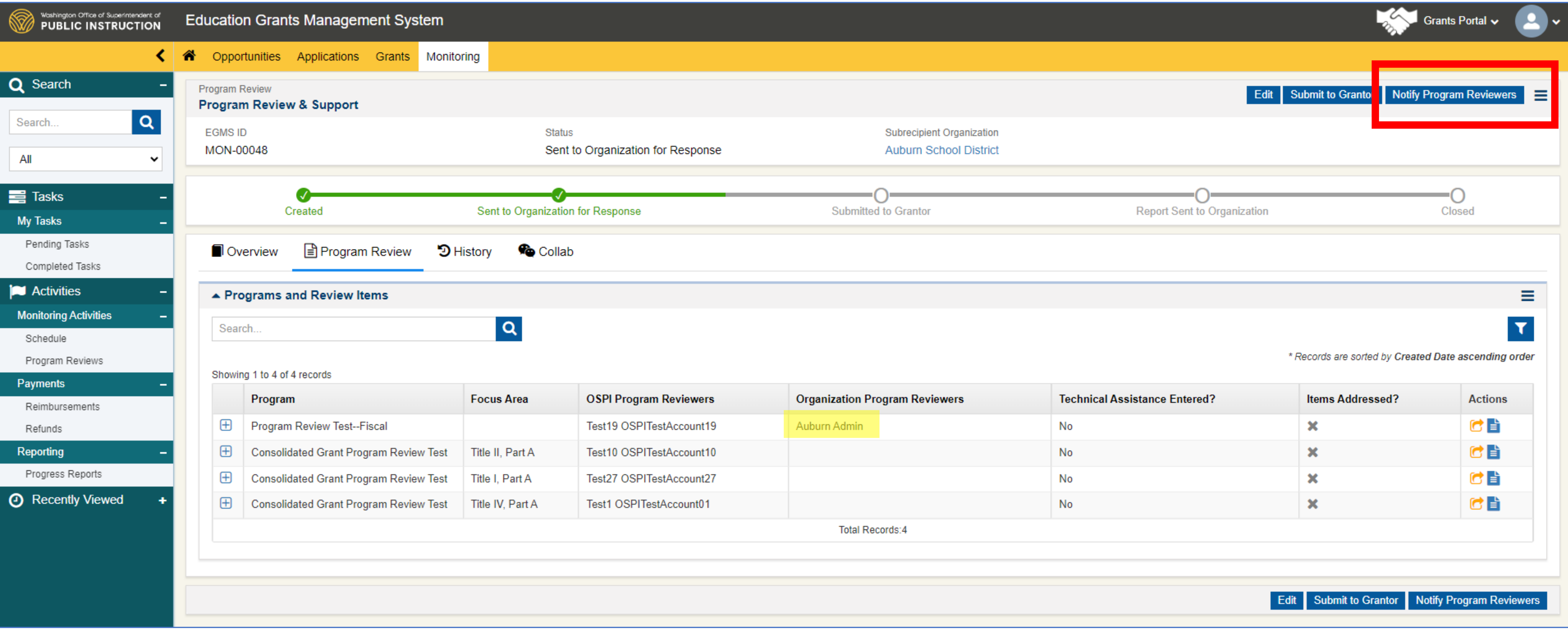
- ❑ Click on the name of the staff member to assign. Then click **Save.**



- ❑ Add another staff member to that same Program by completing the steps above or click on the **x** to close the window.

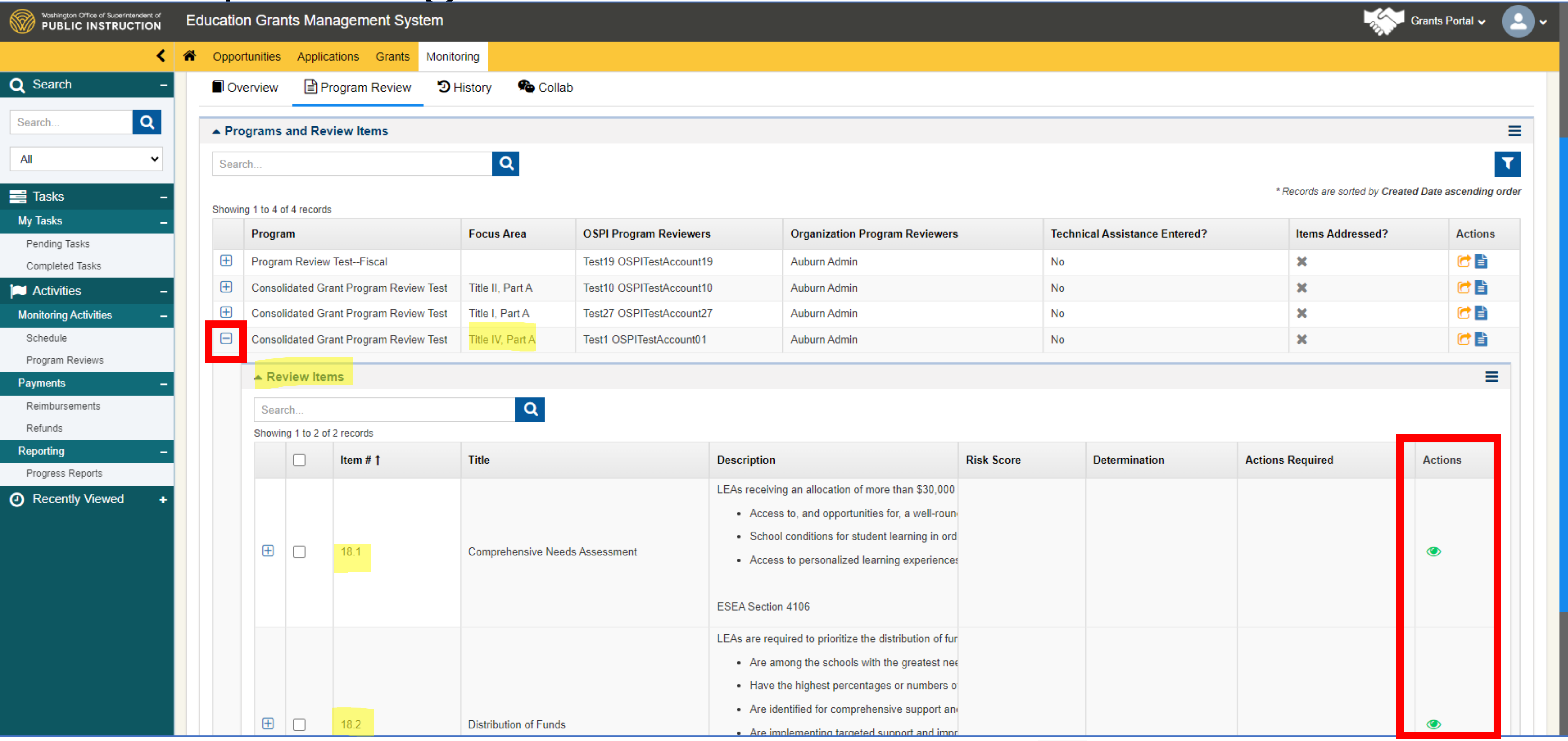


Assign Organization Program Reviewers



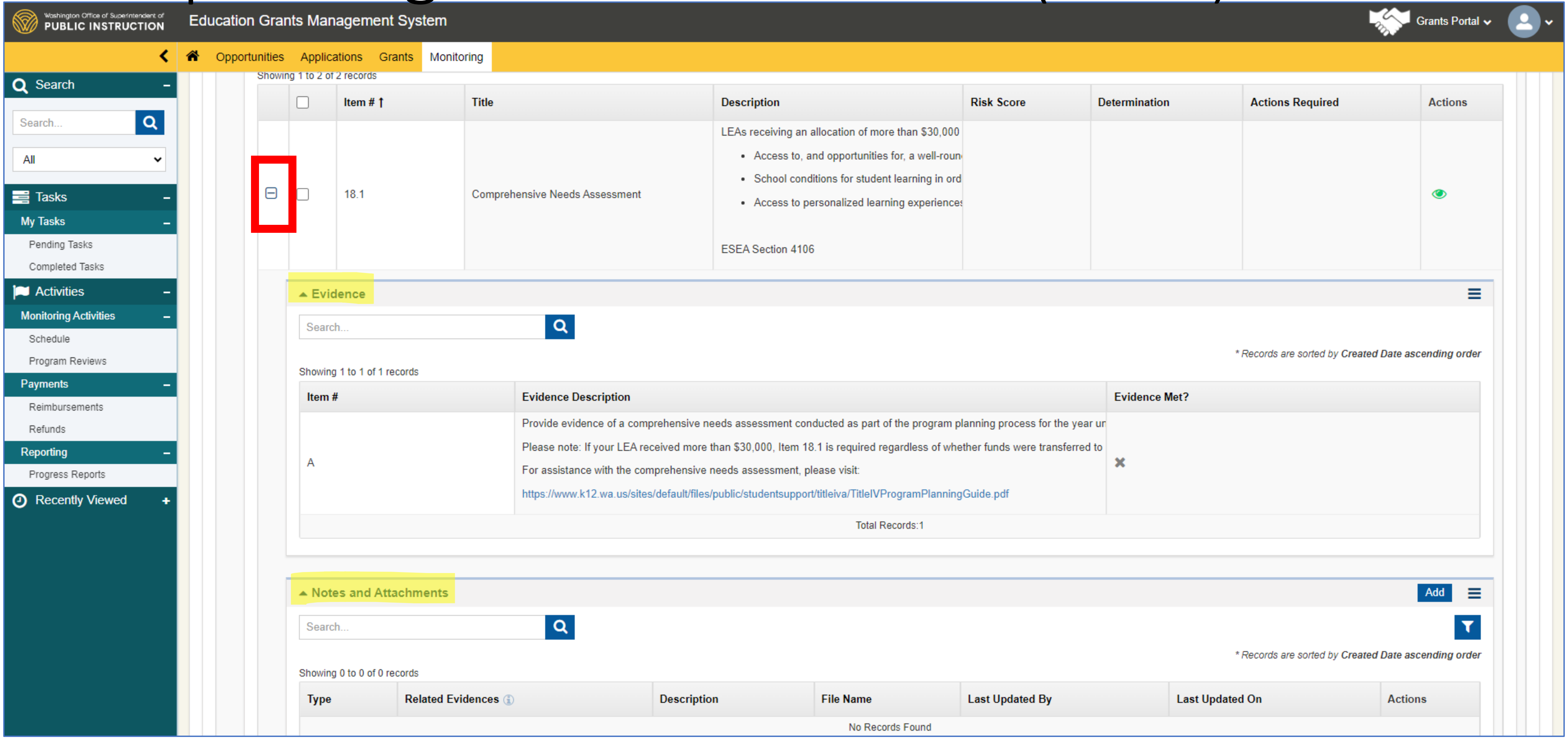
- ❑ After the assignment is made for the first row, use the same process until all rows of the table have assignments.
- ❑ Once all rows have assignments, click on **Notify Program Reviewers** to send an automatic email to each Organization Reviewer.

Responding to Checklist Items



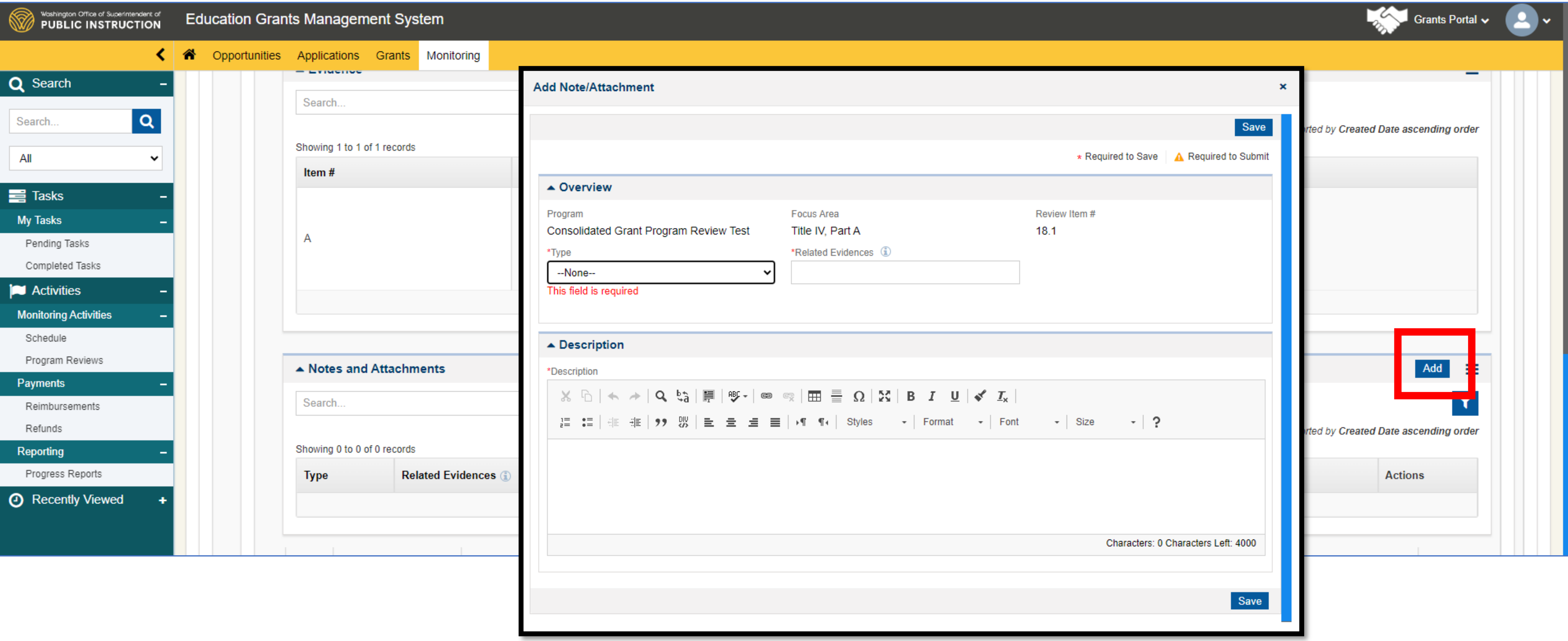
- Use the ⊞ to expand each row to see the checklist (or Review) items. Click on the 👁 to read the **Description** if needed.

Responding to Checklist Items (cont.)



- ❑ Use the [+] to expand the Review Items and see the **Evidence** sub-items. Hover over the **Evidence Description** to read more.
- ❑ Use the **Notes and Attachments** section to upload documents, descriptions, and notes.

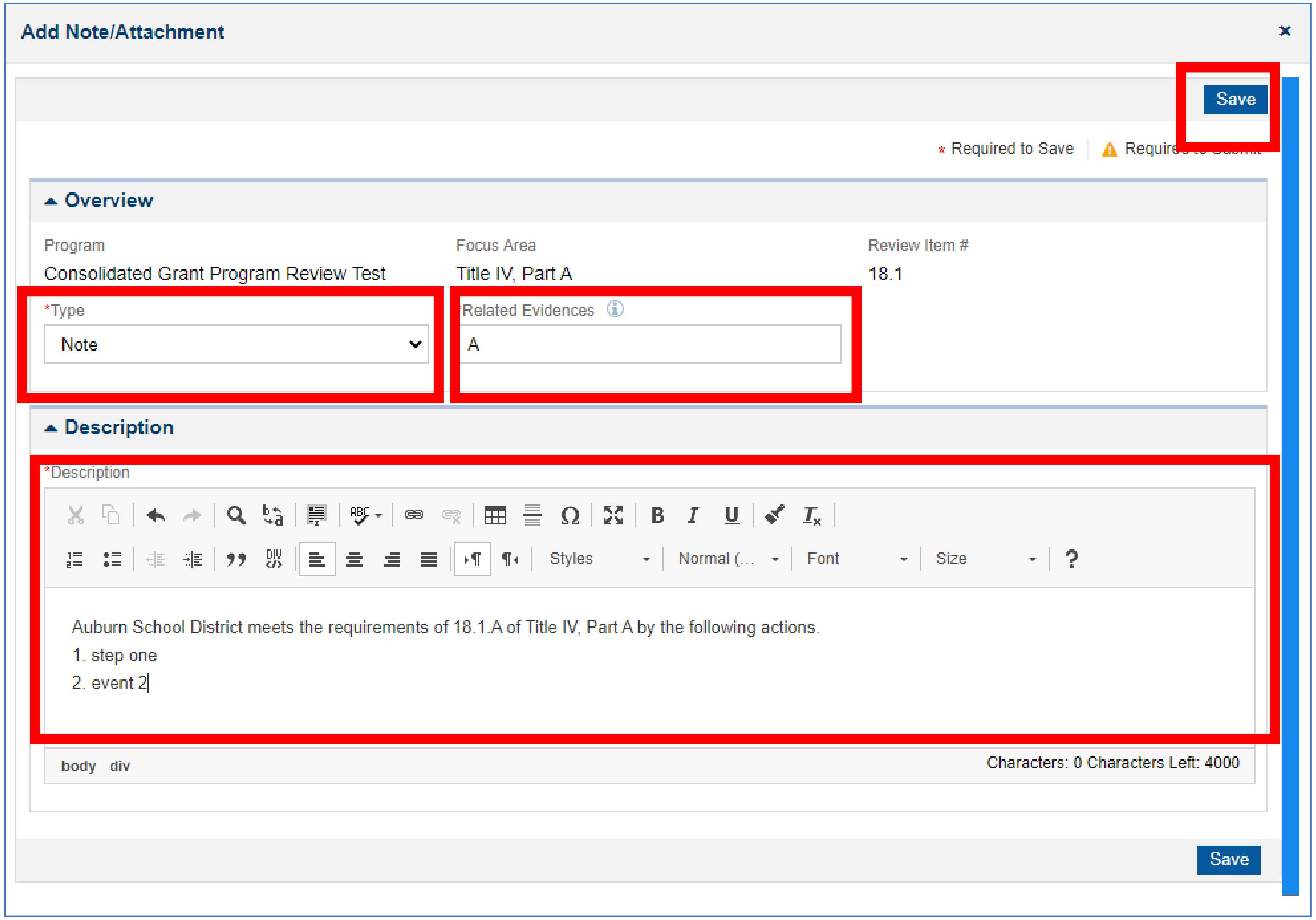
Responding to Checklist Items (cont.)



- ❑ Click on **Add** to add a response to the Checklist Item with a Note or an Attachement.
- ❑ Window will pop-up with the fields to complete.

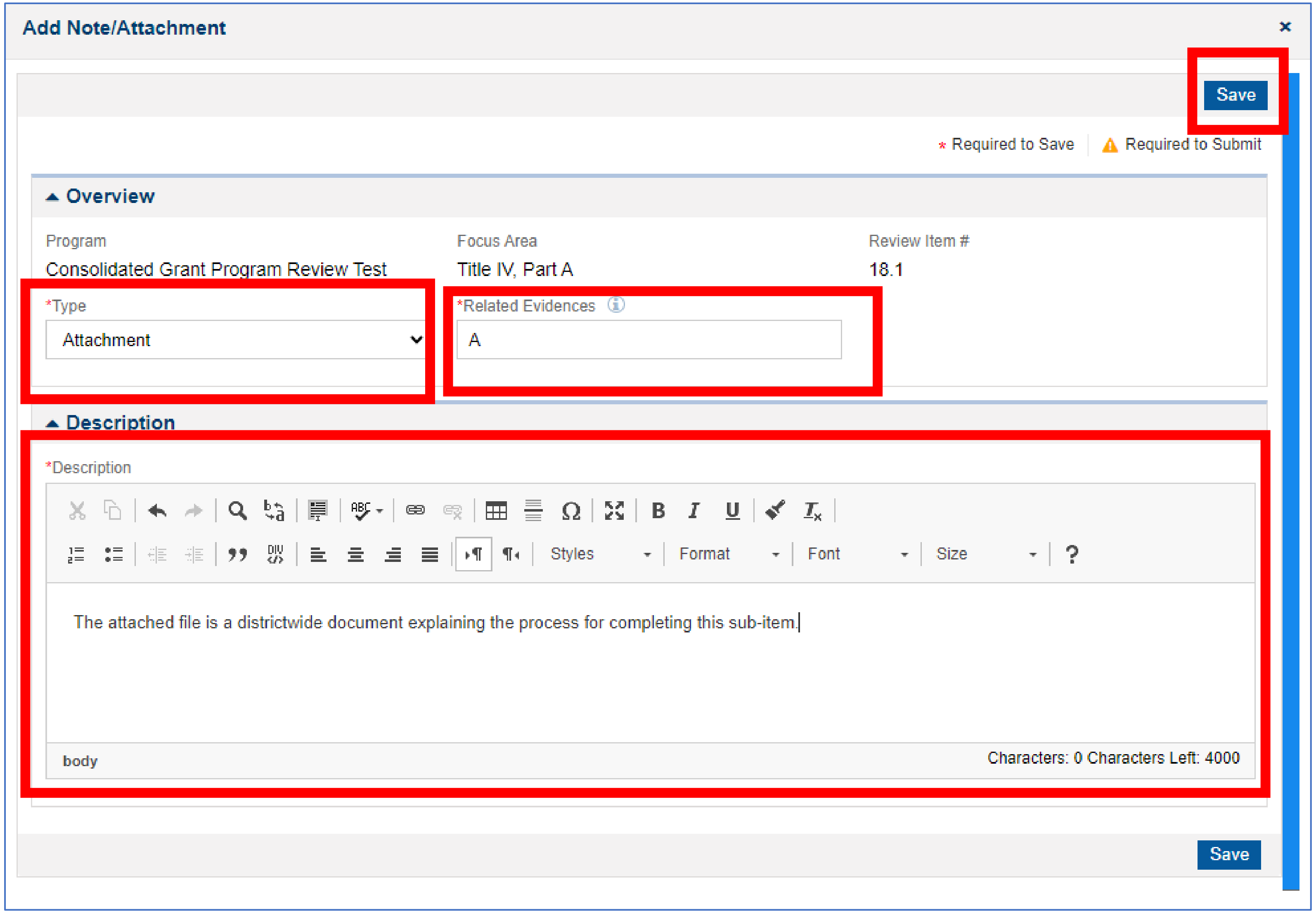
Uploading a Note

- ❑ Click on the **Type** field to select **Note**
- ❑ Enter the ***letter*** of the sub-item you are responding to in the **Related Evidence** field.
- ❑ Enter the note or description to address the sub-item in the **Description** field. You can edit the text, add links, etc. as needed to completely address the sub-item.
- ❑ Click **Save** when complete.

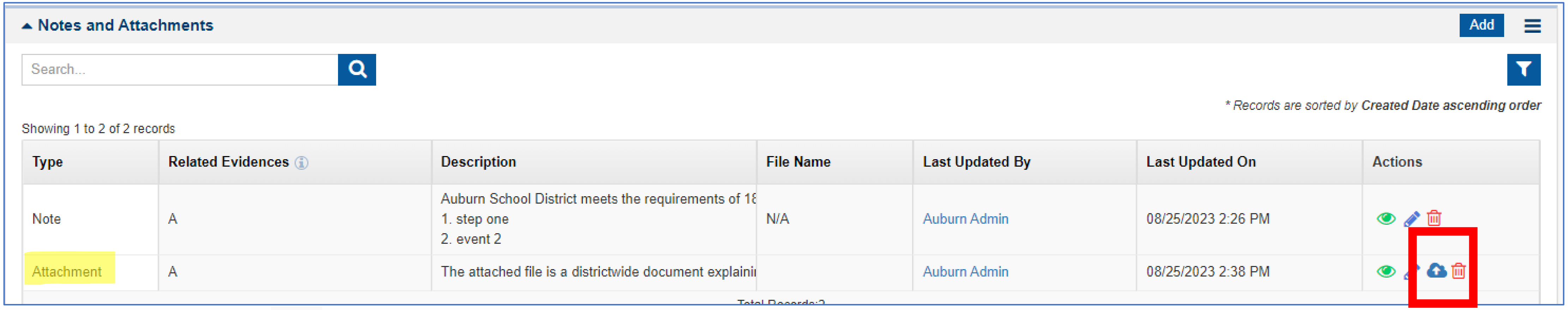


Uploading an Attachment

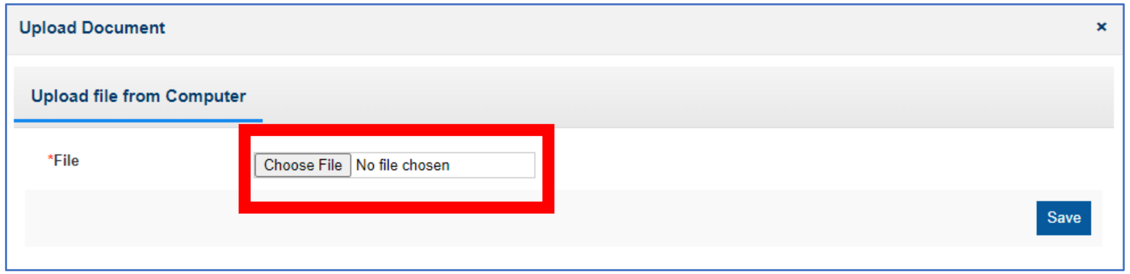
- ❑ Click on the **Type** field to select **Attachment**
- ❑ Enter the ***letter*** of the sub-item you are responding to in the **Related Evidence** field.
- ❑ Enter a description of the file to be attached in the **Description** field. You can edit the text, add links, etc. as needed to completely address the sub-item.
- ❑ Click **Save** when complete.



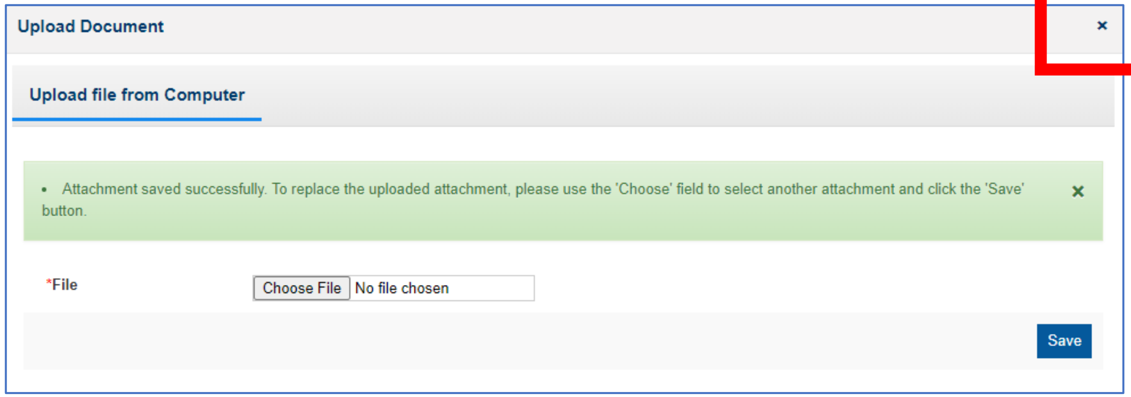
Uploading an Attachment (cont.)



- ❑ Next, click on the upload icon to select the file to upload.

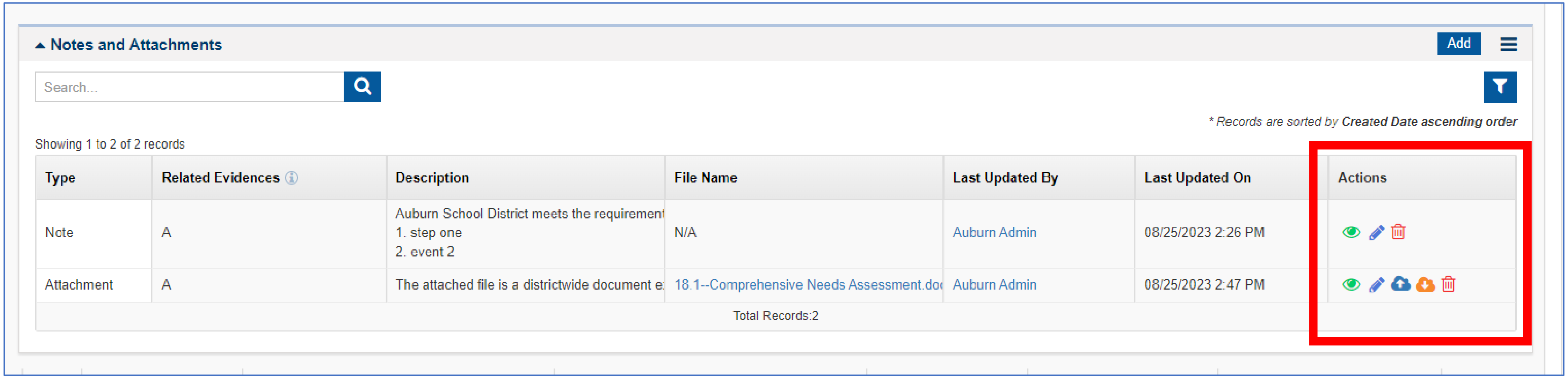


- ❑ Choose File to upload
- ❑ Then click **Save.**



- ❑ A green banner will indicate the file was uploaded successfully.
- ❑ Click the **X** to close the window.

Notes and Attachments (Action Icons)



--The **View icon** opens a pop-up window with details of that row of the table.

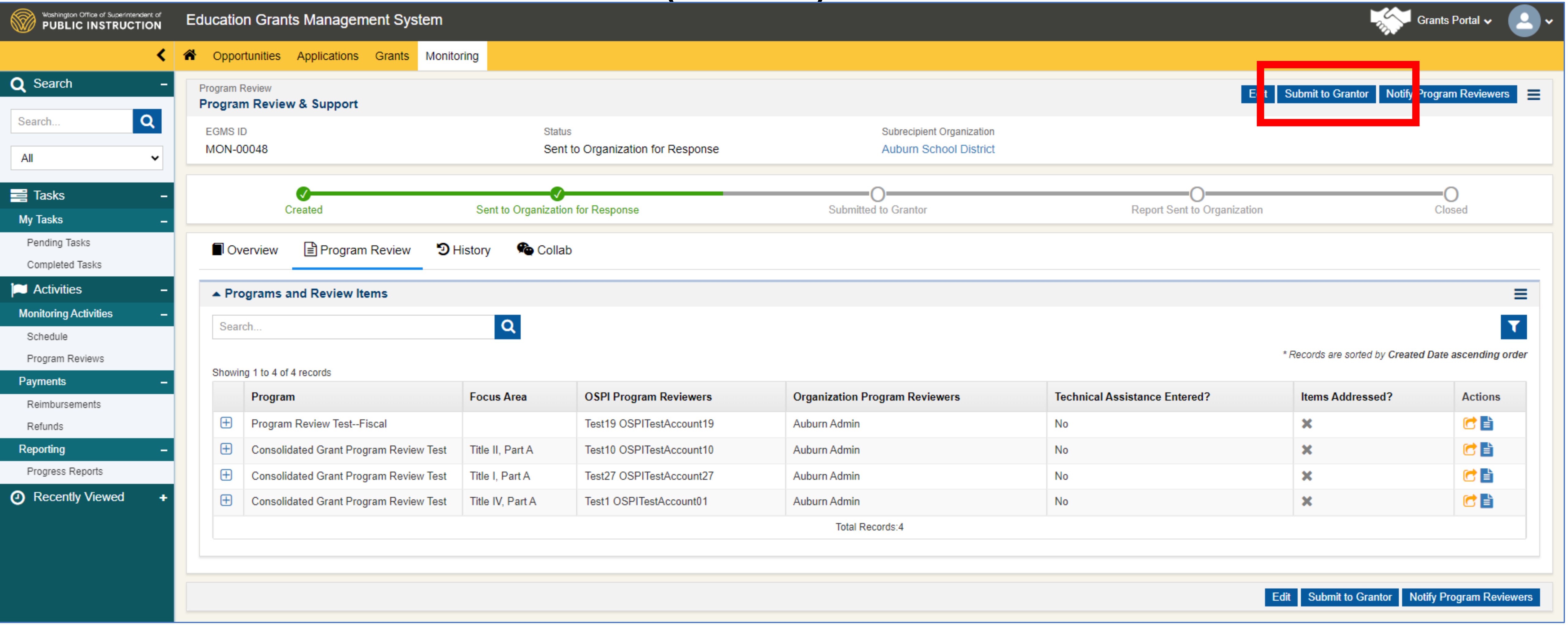
--The **Edit icon** allows you to edit the details of that row.

--The **Upload icon** opens a pop-up window to select and upload a file for that row. It can also be used to replace the file in that row.

--The **Download icon** will download the file from that row of the table.

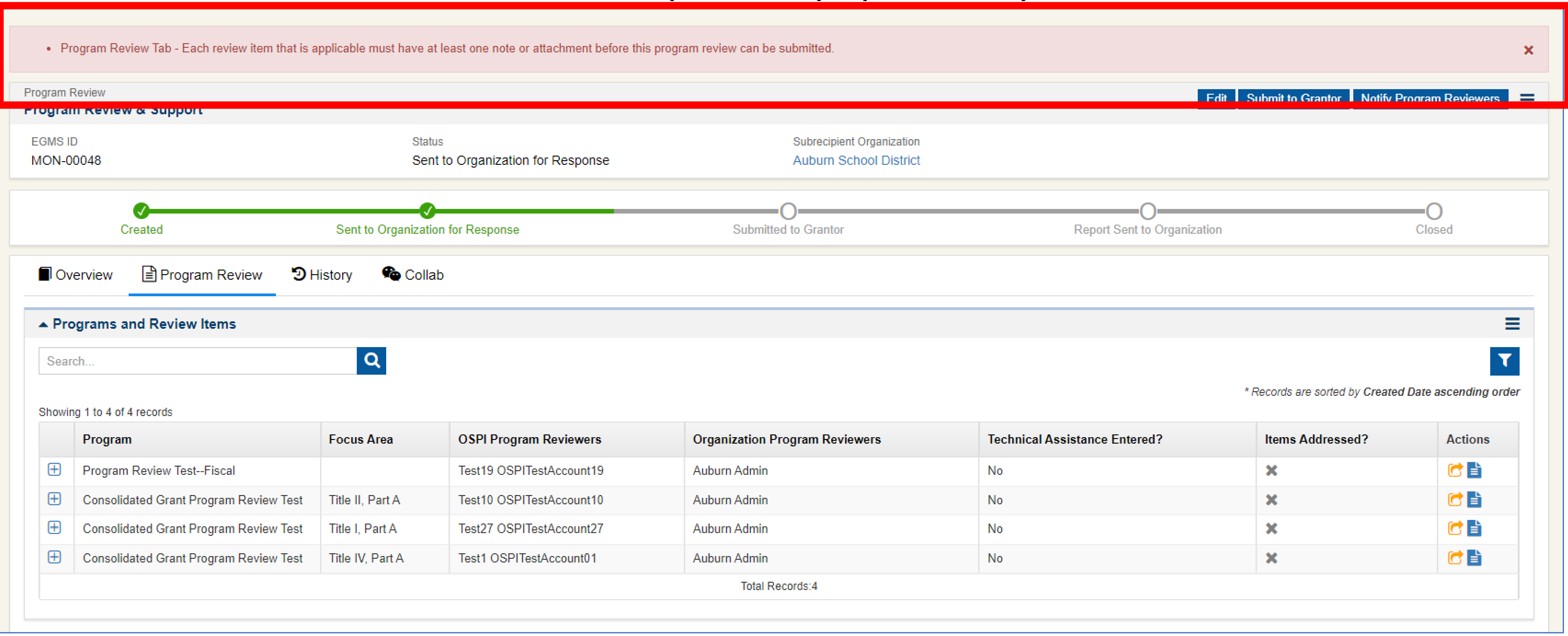
--The **Delete icon** will delete that row of the table.

Submit to Grantor (OSPI)



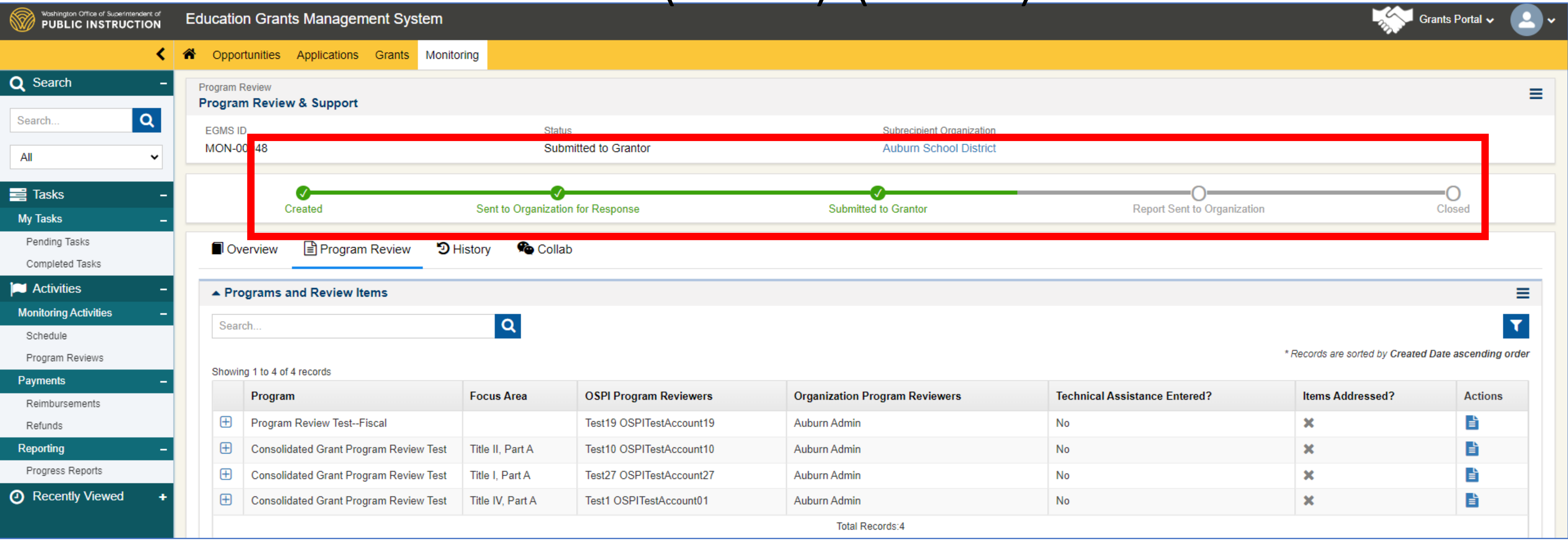
- ❑ Once all items in each checklist are responded to, the Organization Team Lead will click on **Submit to Grantor**.
- ❑ This will send a notification to the OSPI Team Lead that it is ready for OSPI staff to review.

Submit to Grantor (OSPI) (cont.)



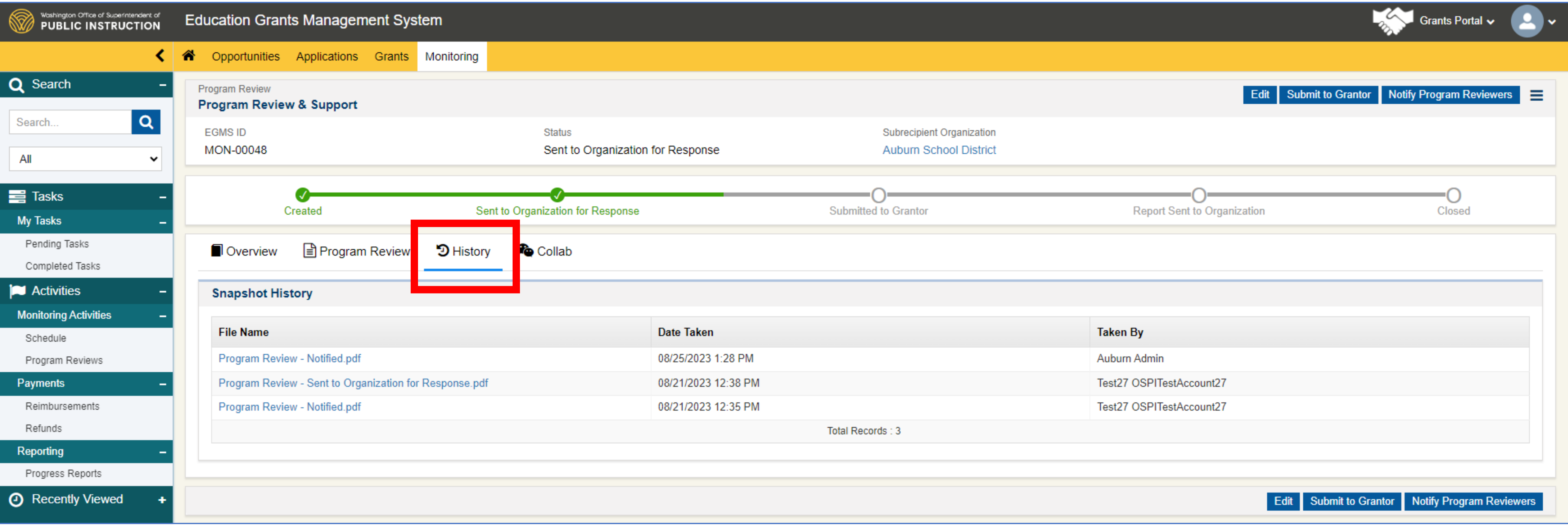
- ❑ All items must be responded to. If any responses are missing, you will see this Pink Banner indicating at least one item is missing a response.

Submit to Grantor (OSPI) (cont.)



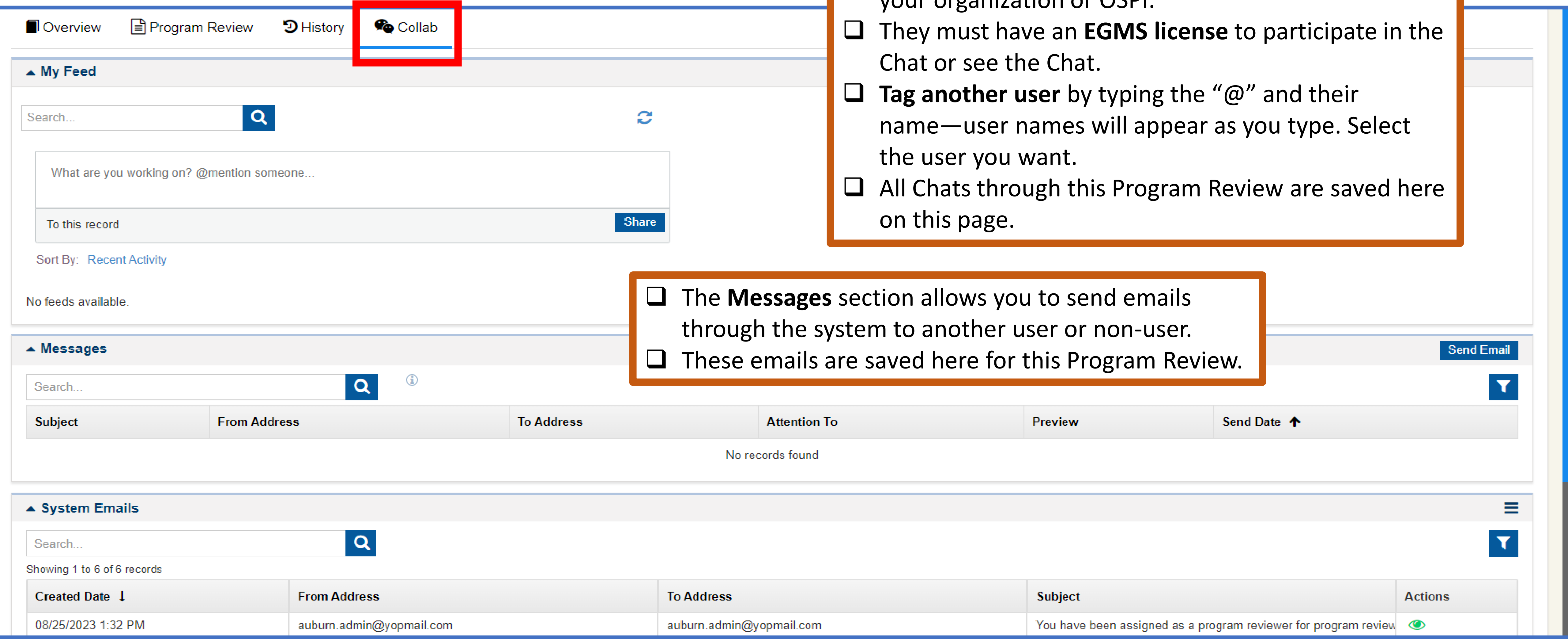
- ❑ If all items are responded to, the page will refresh, and the **status bar** will indicate the new status: **Submitted to Grantor**.
- ❑ Now that it is submitted to OSPI, the organization cannot respond to, or edit any of the responses.
- ❑ After OSPI's review, the OSPI Team Lead will send it back to the Organization for additional responses as needed.

History Tab



- ❑ The History tab includes a “snapshot” of the entire Review every time there is a change in the status.
- ❑ These snapshots are saved here as pdf documents with dates and the name of the person (Team Lead) who made the status change.

Collab Tab



- ❑ **My Feed** allows you to Chat with any other user in your organization or OSPI.
- ❑ They must have an **EGMS license** to participate in the Chat or see the Chat.
- ❑ **Tag another user** by typing the “@” and their name—user names will appear as you type. Select the user you want.
- ❑ All Chats through this Program Review are saved here on this page.

- ❑ The **Messages** section allows you to send emails through the system to another user or non-user.
- ❑ These emails are saved here for this Program Review.

- ❑ The **System Emails** section contains a record of every automatic email notification generated by the Organization Team Lead or the OSPI Team Lead.

Additional Information

- The EGMS Administrator in your LEA or organization can assist with assigning EGMS licenses. If the org. or LEA reaches their maximum license amount, the Admin can reach out to Amy.Harris@k12.wa.us and Cc EGMS.Support@k12.wa.us to request additional licenses.

- Once you gain access to the Program Review, if you have questions or concerns with EGMS Program Review, reach out to the OSPI Team Lead assigned to your Review.

- Coming Soon
  - Part 2: Responding to the Preliminary Report in EGMS
  - Part 3: Closing the Program Review and Follow-up