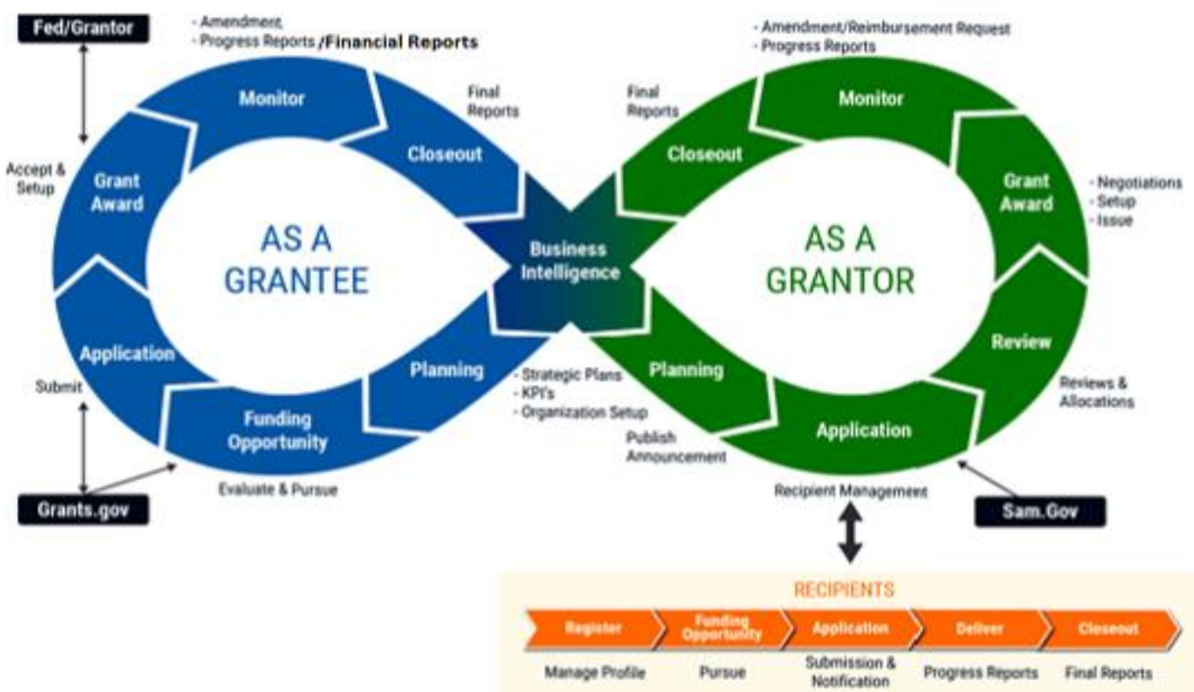
Education Grants Management System
User Guide for Local Education Agencies

Table of Contents

1 SYSTEM OVERVIEW

The Education Grants Management System (EGMS) is an end-to-end grant management application that unifies the Grantee and Grantor grant management processes across agencies. The EGMS user interface is designed to provide users with a quick approach to identify to apply for funding opportunities, manage grants and award grant recipients. The EGMS offers an enterprise solution to identify, track and manage tasks. The EGMS also provides Recipient capabilities for organizations needing tools to administer, track, account for, and report on their grant-related activities. The EGMS is broken down into two separate portals – an internal and an external portal – to support the grants management business processes for the Grantor and Grantee, and an external Grants portal to support Subject Matter Experts and Recipients.



1.1 INSTRUCTIONAL NOTATIONS

	Important note about functionality or behavior.

	Highlight action discussed in the associated narrative.

2 UNDERSTANDING THE SYSTEM-CONCEPTS

2.1 PHASES

The EGMS system uses Phases to organize its features and available actions. These Phases map to the grantmaking lifecycle and are a key navigation feature in EGMS. The Phases are seen as tabs at the top of the user interface (UI). The Phases include Home, Opportunities, Applications, Awards, Monitoring, Closeout, Analytics and Collab.

Each Phase and associated activities are listed in **Error! Reference source not found.**.

Phase	Associated Activities
Home	View and manage organization profiles, contacts, and terms and conditions
Opportunities	View opportunities and notices of intent.
Applications	Allows organizations/individuals to apply for the Funding Opportunity Announcement (FOA). Applications are managed, reviewed, and can be negotiated. Complete and submit Pre-applications and applications.
Grants	View and manage grants and subawards. Organizations receive notice of the grant against Funding Opportunities.
Monitoring	Complete and submit post-award monitoring activities and collaborate onsite visits and desk reviews.
Closeout	View and acknowledge closeout requests.
Analytics	This is a Dashboard page where all the activities of the GovGrants® solution are captured in the form of charts related to all phases. Users can even refine the filters to check specific information.
Collab	This tab tracks the conversation conducted between the users within the organization.

Table 1: EGMS Phases

2.2 ACRONYMS

Following is a list of common acronyms used in the system and their definitions.

Table 1: Acronyms

Acronym	Definition
EGMS ID	Education Grants Management System ID
EIN	Employer Identification Number
DUNS	Dun & Bradstreet Number
KPIs	Key Performance Indicators
NOGA	Notice of Grant Agreement
FDM	Funding Decision Memo
SME	Subject Matter Expert (External or Internal Reviewer)
POC	Point of Contact

2.3 COMMONLY USED ICONS

Error! Reference source not found. below describes the most commonly used icons in the EGMS.

Table 3. Icons

	View detailed information about the associated record
	Begin the review process
	Not recommended by the reviewer
	Recommended by the reviewer
	Edit associated record
	Delete associated record
	Section- or page-specific actions. Left-click to display options. Options may differ depending on the context.
	Home page
	Available filter options

	Un-collapse taskbar section
	Collapse taskbar
	Un-collapse taskbar
	Collapse taskbar section
	Un-collapse content window section
	Collapse content window section
	Dropdown menu
	Reports
	Recently viewed items
	Activities
	Filter options
	Begin task
	Search
	Initiate negotiations
	Create Subaward

3 COMMON FEATURES

EGMS has many features that are used throughout the system, regardless of record type, phase or workflow. These generic features provide a common interface and behavior.

3.1 LOOKUPS

Lookups are performed at the field level. They allow the user to populate a field by conducting the lookup against the appropriate field. In **Error! Reference source not found.**, selecting the icon, brings up a window that allows the available value to be selected.

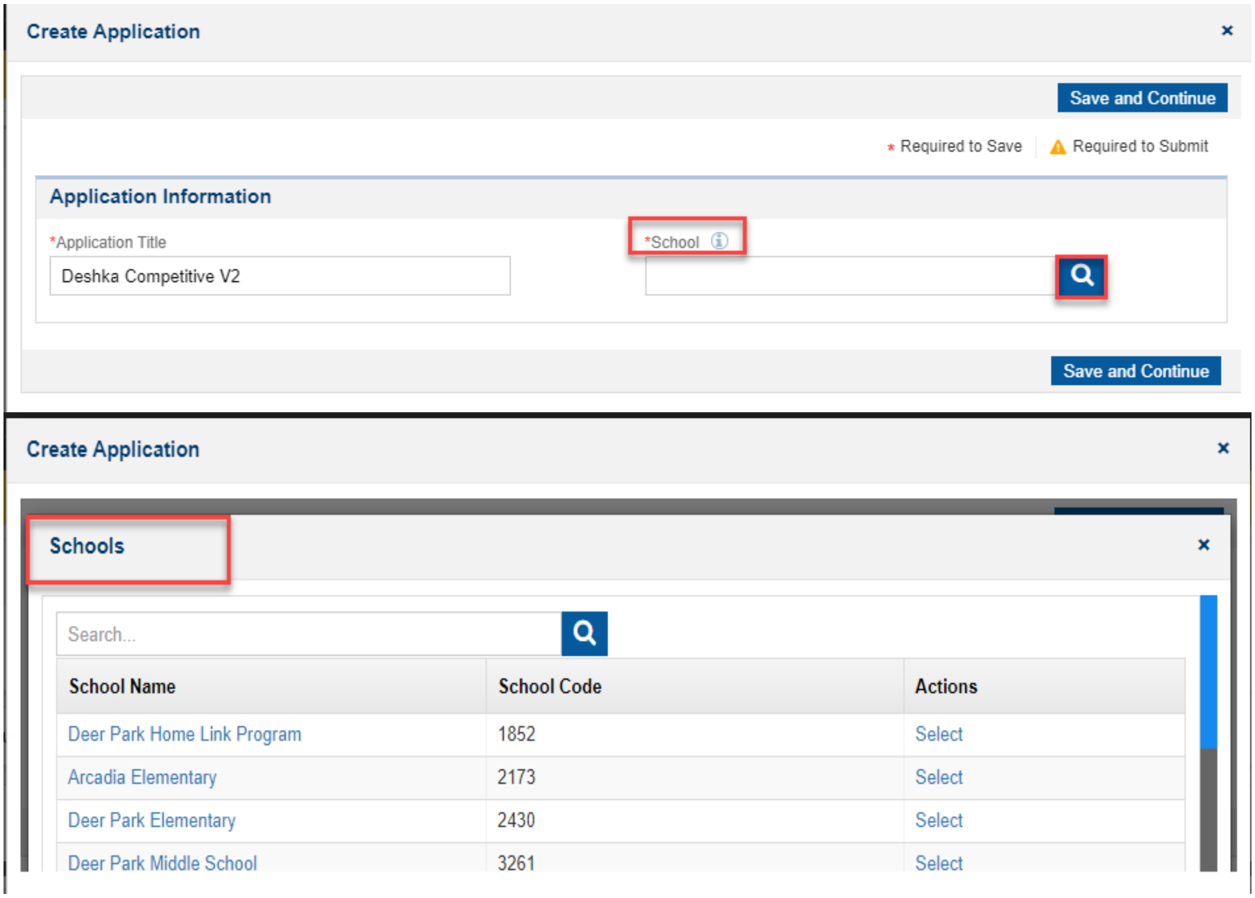


Figure 1: Lookup

3.2 LIST FILTERS

Lists within EGMS provide both a quick and advanced search capability.

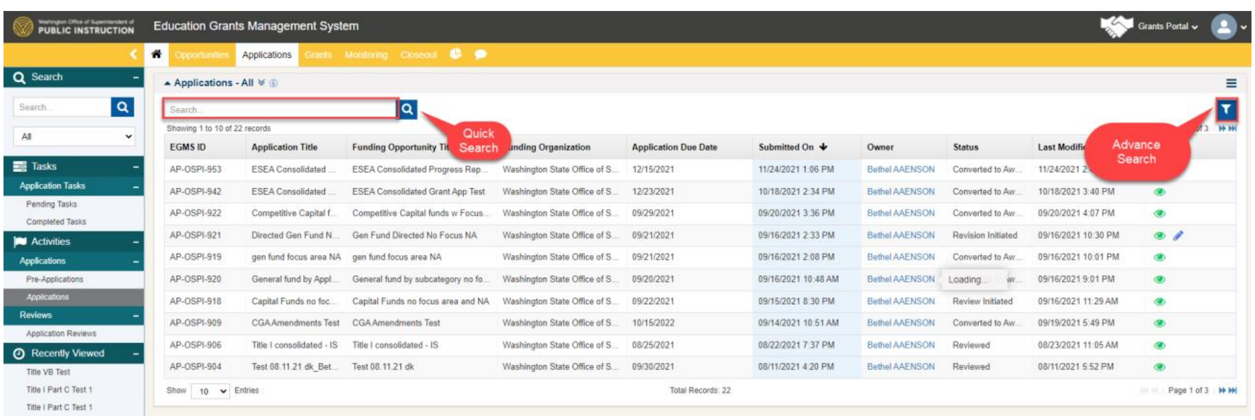


Figure 2: List Filters

A quick search can be added by simply typing in a full or partial string. Only records with matching data will then appear.

Advanced search allows a more complex set of search criteria. This feature supports all available fields and allows multiple criteria to be entered.

To begin an advanced search, click on the **Filter** icon at the top right of the screen.

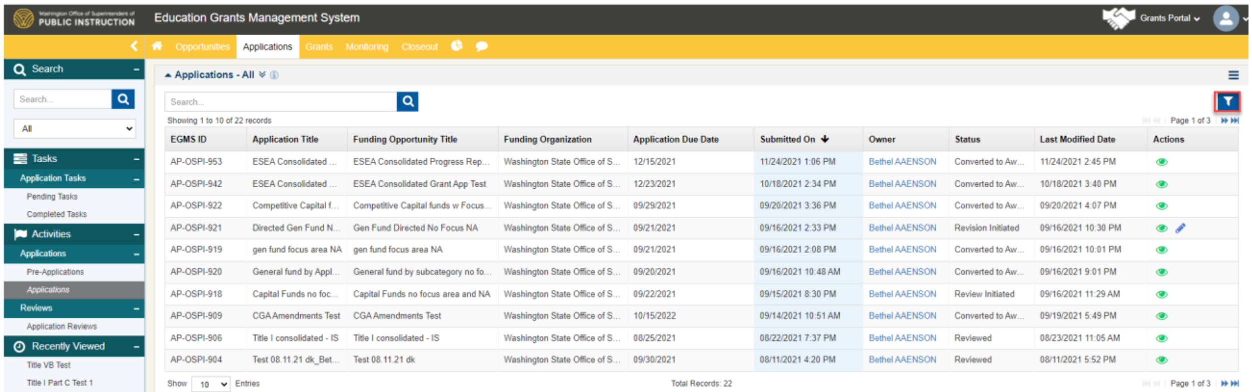


Figure 3: Advanced Search Button

This will open an enhanced filter section where you can enter additional filter criteria. There are three values you can populate here to narrow your results list:

1. Column Name- The values here will populate based upon the table that you are viewing. Each of the columns in the table that are available for filtering will be listed.

2. Operator- The options available here will differ based upon data type for the column you have selected. Text fields will show operators such as Contains, Starts with, and Ends with. Numeric fields will show Equals to, Greater than, Less than, Greater than or equal to, and Less than or equal to. Other options may also be available depending upon the data type of the selected field.

3. Value- This is where you enter the value that you would like to use for filtering the selected column.

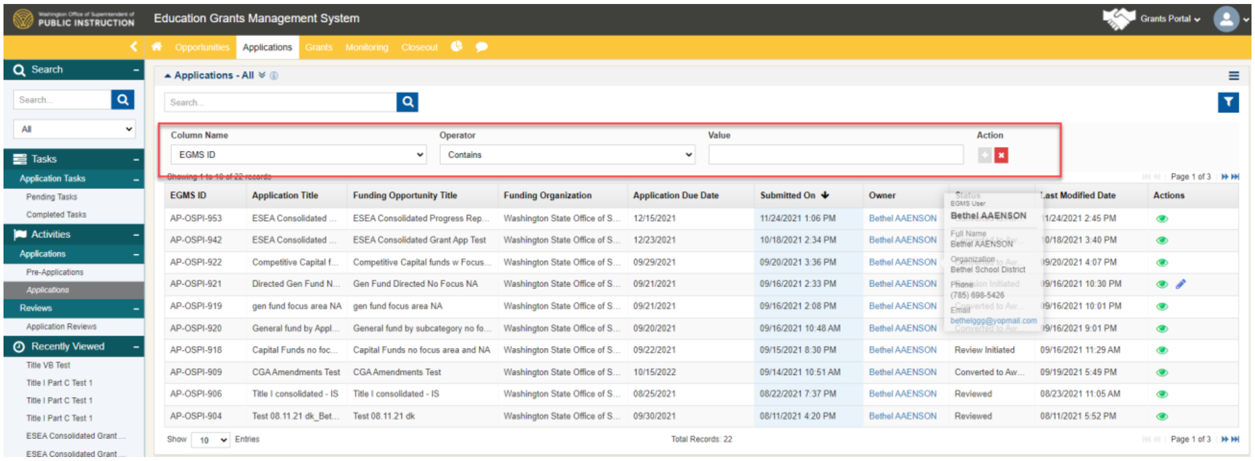


Figure 4: Advanced Filter Options

Once you have entered your filter criteria, the + button in the action column will turn green. Click this button to apply your filter. A blue colored icon will show with your filter criteria below the filter bar, and your results will be filtered accordingly.

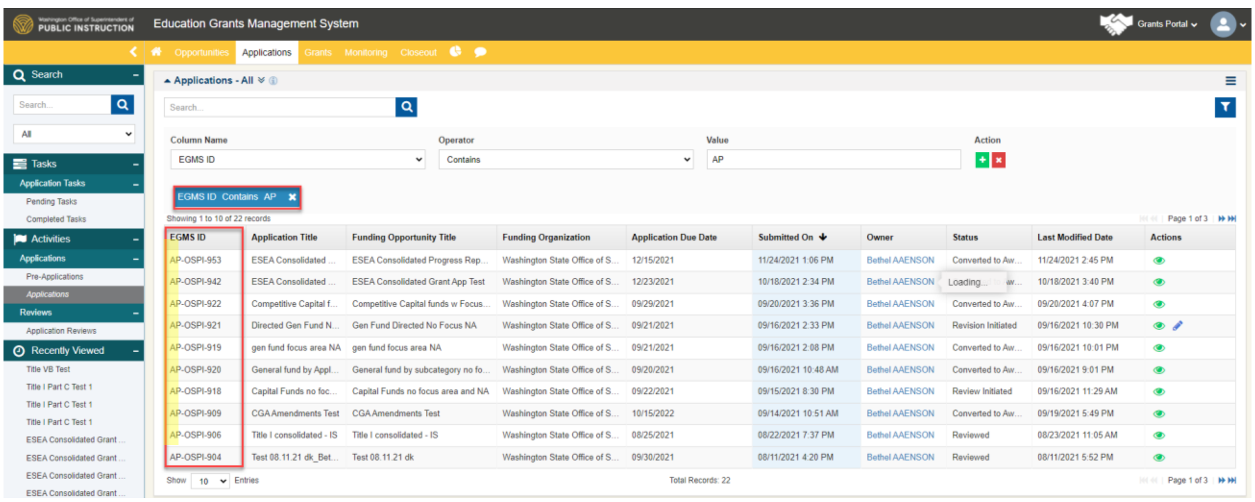


Figure 5: Advanced Filter: Applying Filter Criteria

- Highlights were added above for demonstration purposes to show the terms that the filter matched for the results list. Highlights will not show in the EGMS. In the above example, we filtered to show only the grants that contained "AP" in the grant ID field.

To remove your custom filter, click the X on the blue icon for the filter you created.

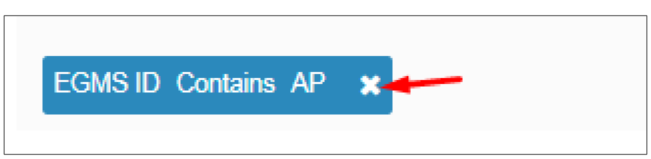


Figure 6: Removing an Advanced Filter

- To add additional filter criteria, click the green + icon in the Action column.

Click the filter icon again to hide the advanced filter section.

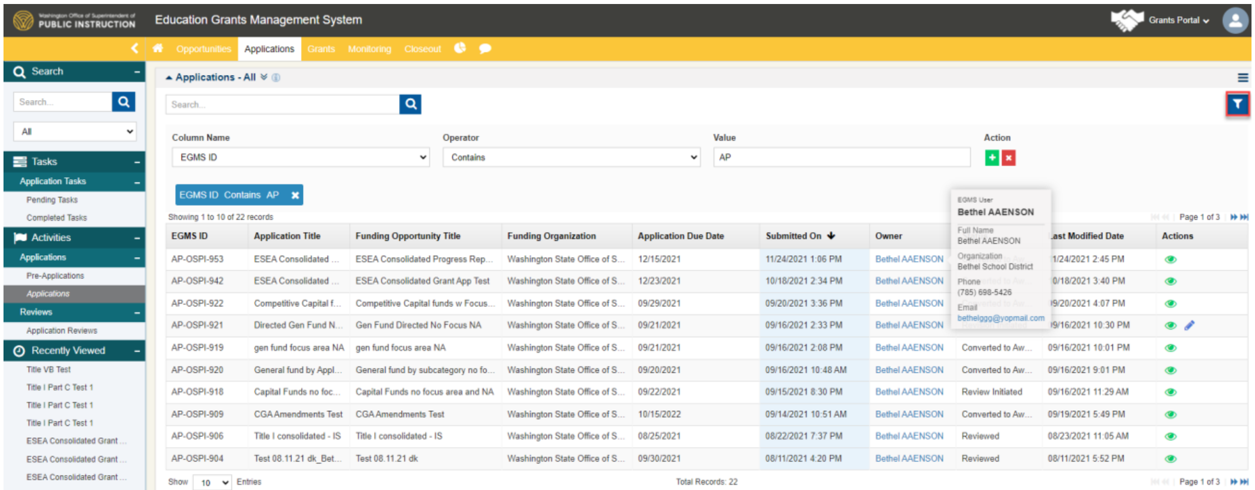


Figure 7: Hide Advanced Filter

3.3 FILES (ATTACHMENTS)

Attachments are files associated with a record. Many different types of records can include attachments. Regardless of the type of record, all attachments work in the same manner:

- First, attachments may be required or optional. This will depend on the type of activity. Validations can be added to ensure users add attachments by requiring that a file be uploaded with a specific *Classification type* selected.
- Second, attachments can be loaded from your local computer or any file from your workspace.
- Third, all attachments must include a classification. Classifications will vary according to record type.
- Fourth, you must specify sharing options for your uploaded files. You have two options:
    - Visible to anyone with record access – this selection will allow viewing of attachments by anyone who has access to the record. All internal users within OSPI have view access to all records. External users can only view records to which they are associated.
    - Visible to Internal Users with Record Access – This selection will limit viewing of attachments to all internal users. External (District, LEAs, etc.) will not be able to view these attachments.
- Fifth, all attachments must include a brief narrative describing the attachment.

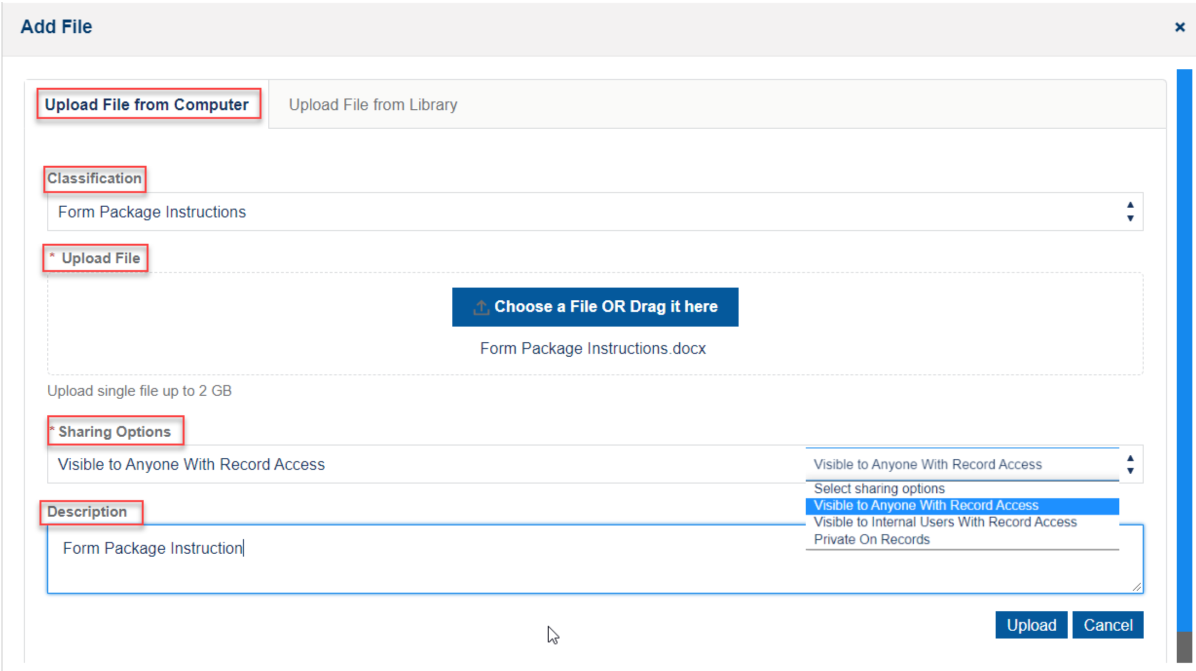


Figure 8: Uploading a File from Computer

When uploading files, you can also select to *Upload File from Library*. Selecting to upload from the library will display up to 1000 files of your most recent uploads.

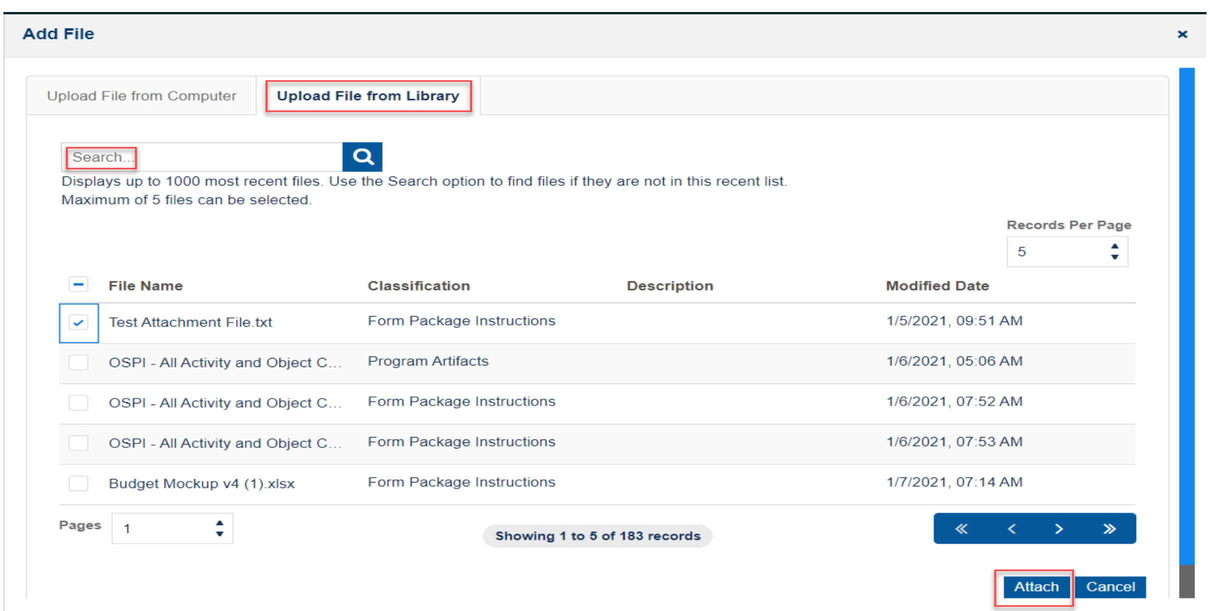


Figure 9: Uploading a File from Library

The screenshot below shows an uploaded file attachment.

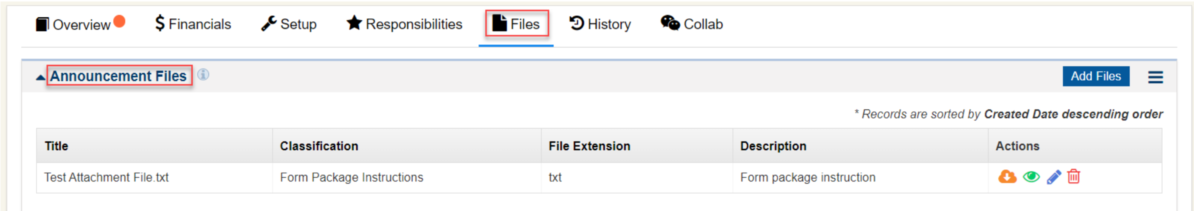


Figure 20: Uploaded Files

4 REGISTRATION PROCESS

4.1 REGISTERING AS AN ORGANIZATION

To register as a Recipient within the EGMS, click on the **Register** button.

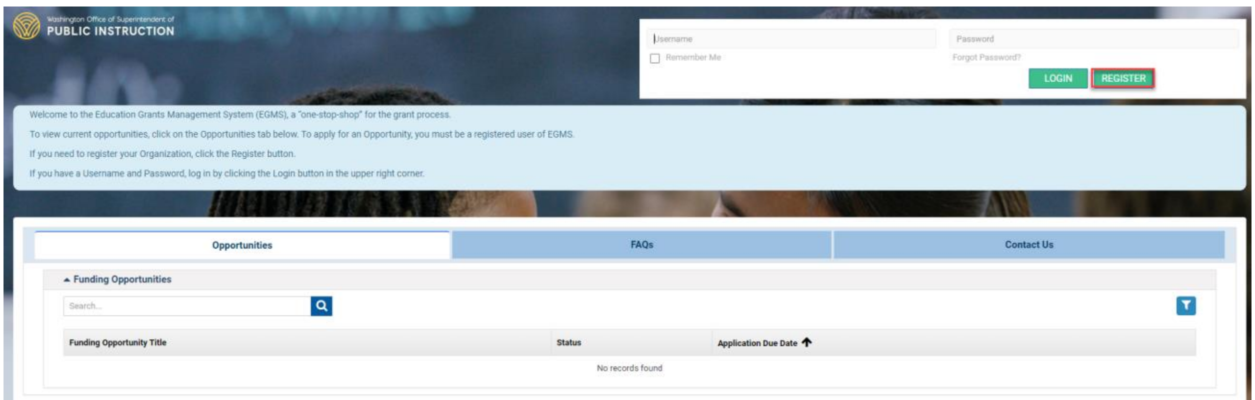
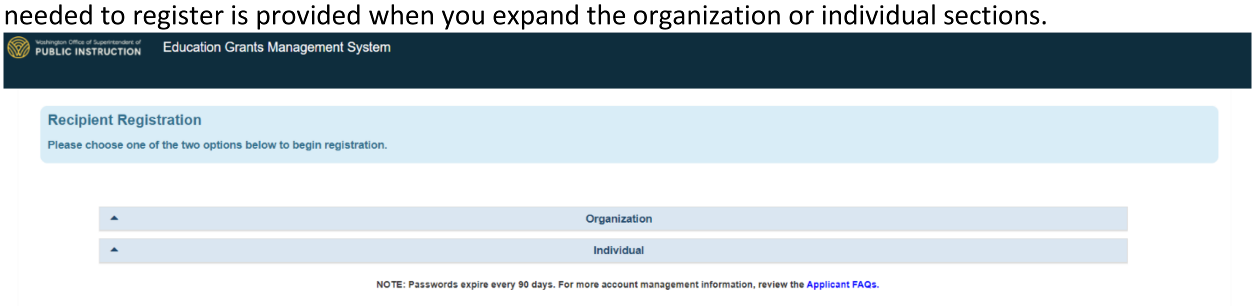


Figure 31: Registering as a Recipient

OSPI EGMS allows you to register either as an organization or as an individual. An organization is an entity that submits grant applications. These include school districts, Local Educational Associations (LEAs), nonprofit organizations, and others. You should only register as an individual if the opportunity stipulates that individual recipients are eligible to receive an award. Detailed instructions on what is needed to register is provided when you expand the organization or individual sections.



To register as an organization, on the Recipient Registration page, in the **Organization** section, click on **Begin Registration** button to start organization registration.

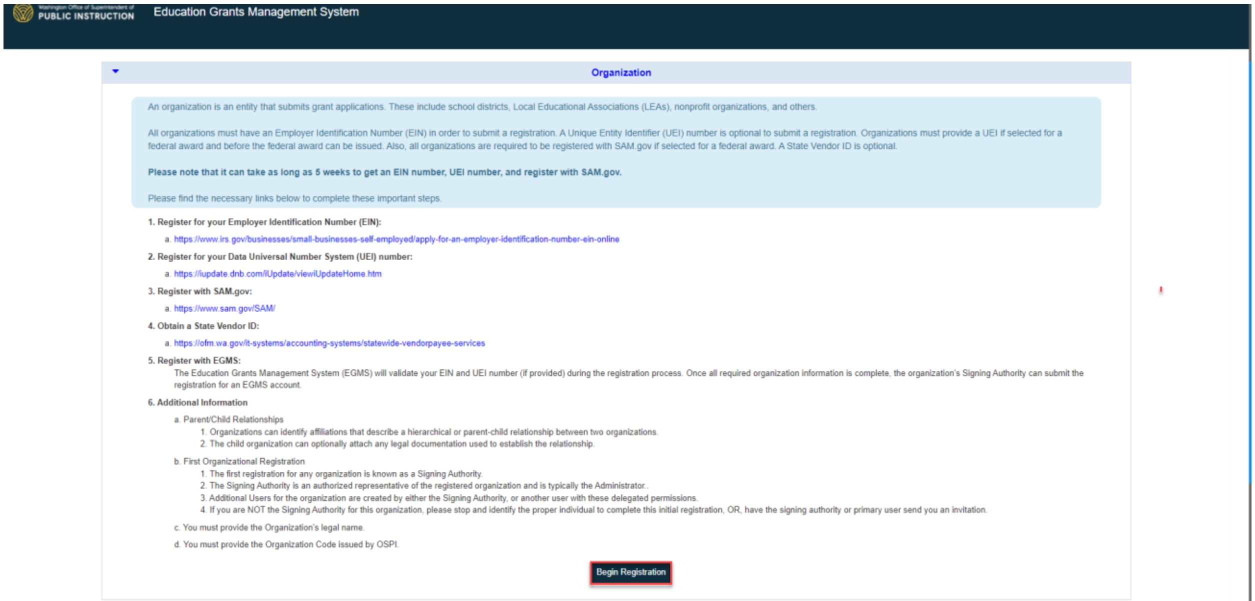


Figure 42: Registering as an organization

Review the Non-Disclosure Agreement and click the **Agree** button if you agree to the terms and wish to proceed with the registration process.

- If you select the **Disagree** button, the Recipient registration process will end.

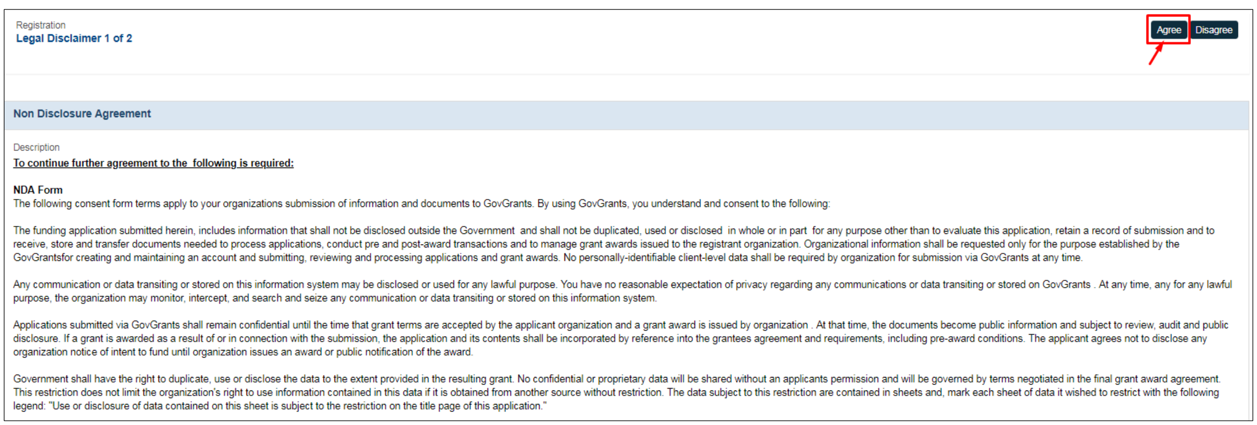


Figure 13: Registering as an Organization – Non-Disclosure Agreement

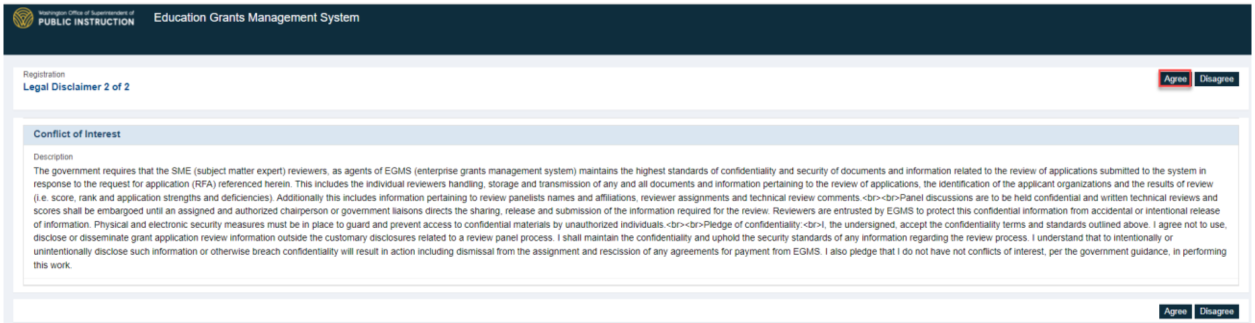


Figure 15: Registering as an Organization – Conflict of Interest

Enter your organization's Employer Identification Number (EIN) and Unique Entity Identifier (UEI) Number and Statewide Vendor ID. Once added, click on the **Save and Continue** button to proceed further.

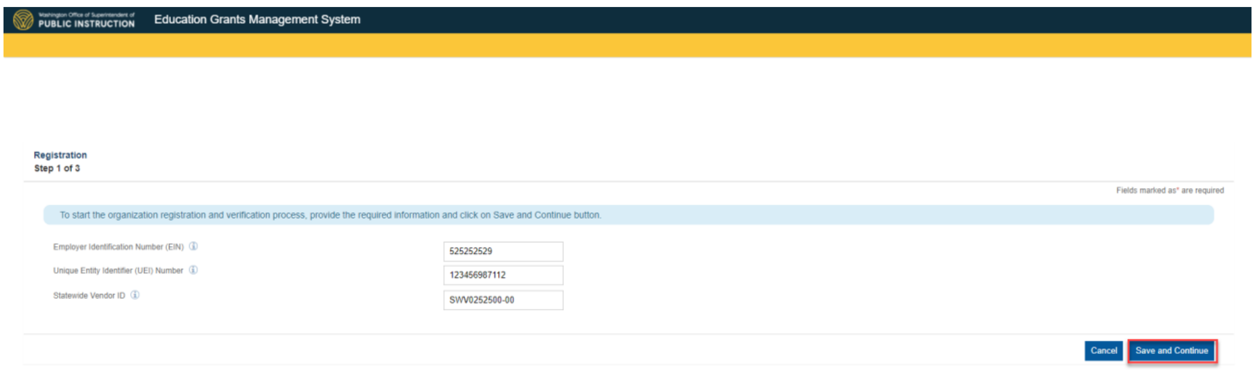
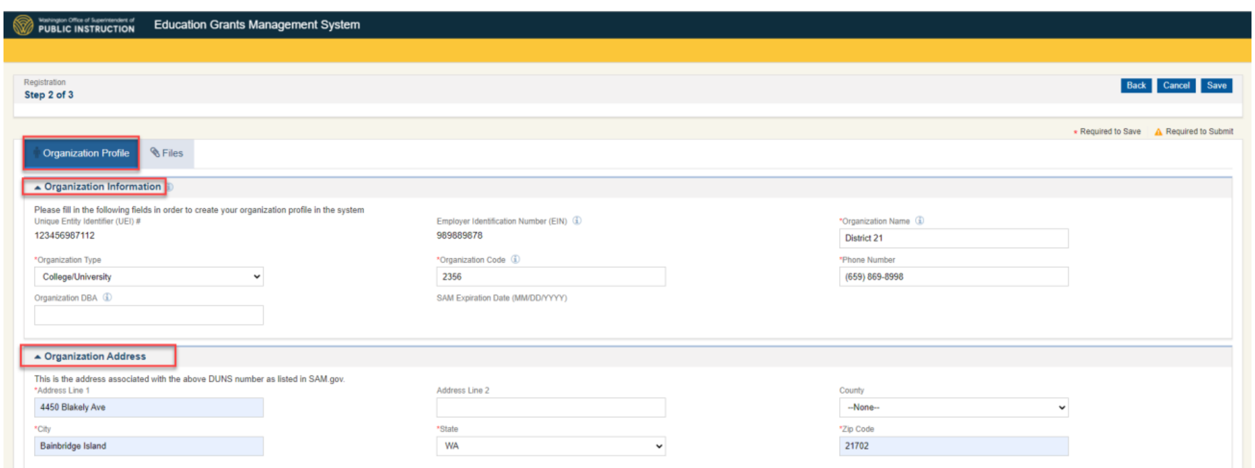


Figure 15: Registering an Organization – EIN, UEI

Navigate to **Organization profile** tab. Provide all the required details in Organization Information, Organization Address, Payment Address sections. Once added, click **the Save** button.



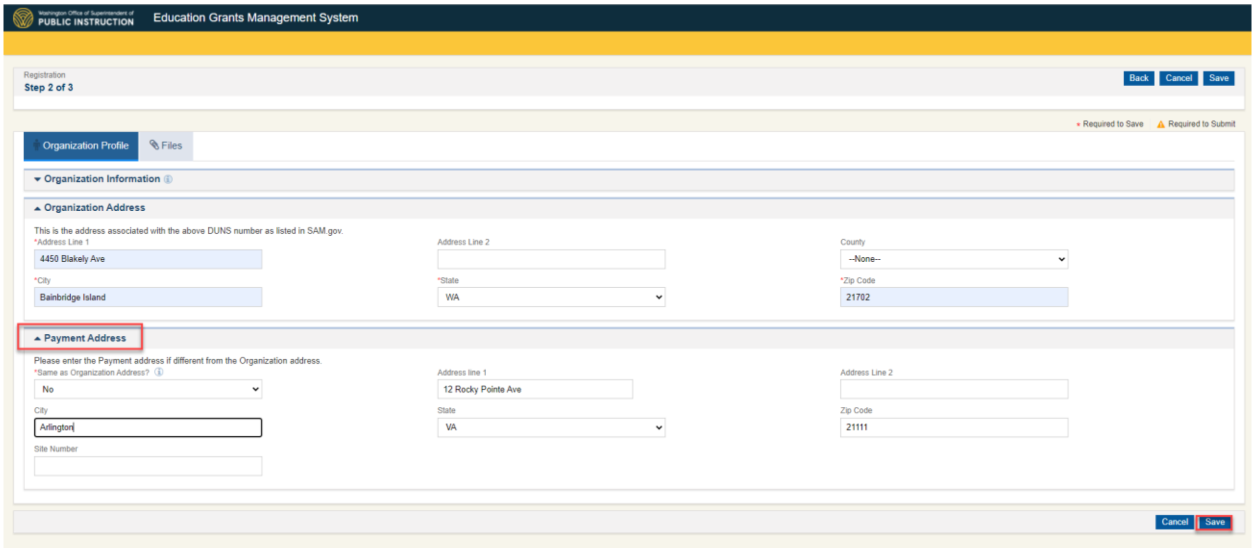


Figure 16: Registering as an Organization – org information

Navigate to **Files** tab, to add the documents – optional step. Click **Add** button to add the document.

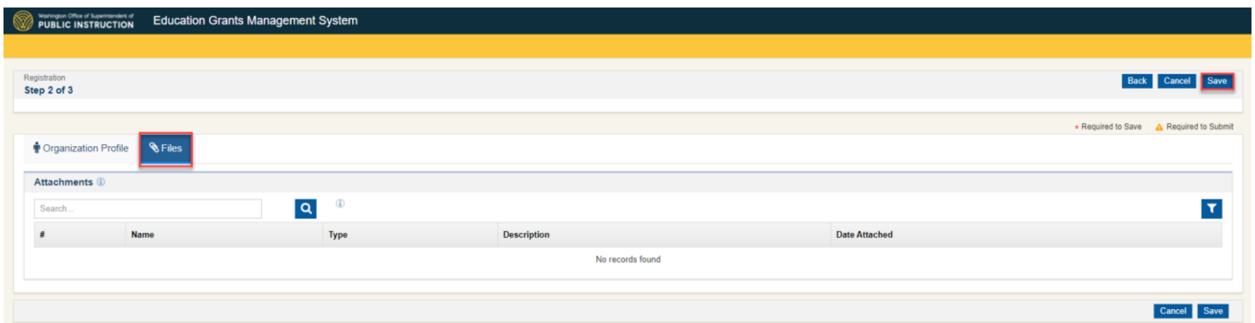


Figure 17: Registering as an Organization – Files

Add the information in the **Authorized Representative Information** section and click the **Save** button.

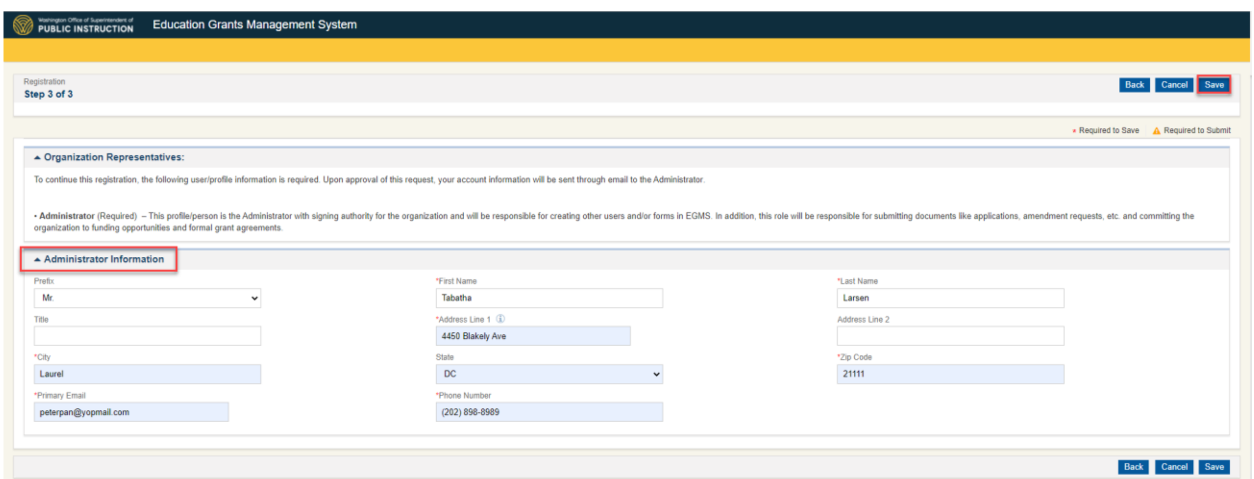


Figure 18: Registering as an Organization – Authorized Representative Information

Verify the CAPTCHA and then click the **Submit** button. The registration request will be sent to the internal approval queue.

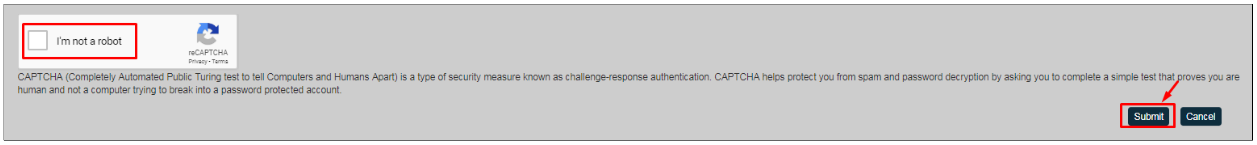


Figure 19: Registering as an Organization – CAPTCHA

- **Make a note of the registration number from the 'Confirmation Message' screen.**

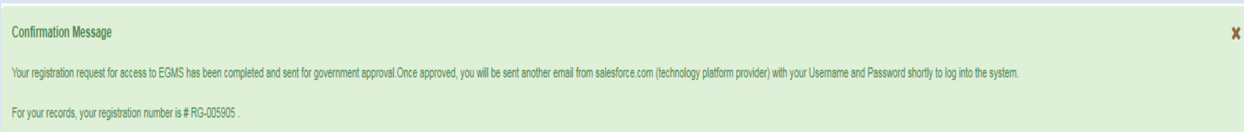


Figure 6: Recipient Registration Confirmation

Figure 20: Confirmation Message

If approved, you will receive an email notification regarding Organization Registration approval.

Contact your System Administrator for registration information.

5 ACCESSING THE SYSTEM

Logging into the EGMS system requires an internet-connected browser. Current versions of Internet Explorer, Chrome and Firefox are supported.

5.1 PREREQUISITE

You will need a username and password to access the system. You can get these credentials through the registration process outlined above in section **Error! Reference source not found.**.

5.2 LOGGING INTO EGMS

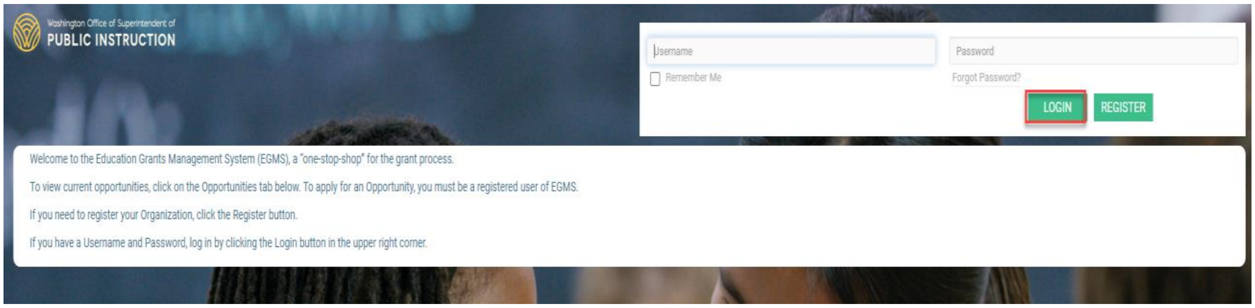


Figure 21: EGMS Recipient Portal Login Screen

1. Navigate to https://ospi-egms.my.salesforce.com/
2. Enter your Username and Password.
3. Click the Login button.

5.3 SECURITY

5.3.1 PASSWORD COMPLEXITY

Password complexity is set by EGMS.

- We may change the complexity required for passwords, in the future.

Currently, passwords must contain:

1. At least 8 characters
2. At least 1 letter
3. At least 1 number

5.3.2 PASSWORD RESETS

If you have forgotten or need to change your password, this can be done from the login page of the EGMS recipient portal.

To reset your password, follow these steps.

Navigate to the recipient portal address in your browser.

https://ospi-egms.my.salesforce.com/

In the Login box click on the Forgot Password? Button.

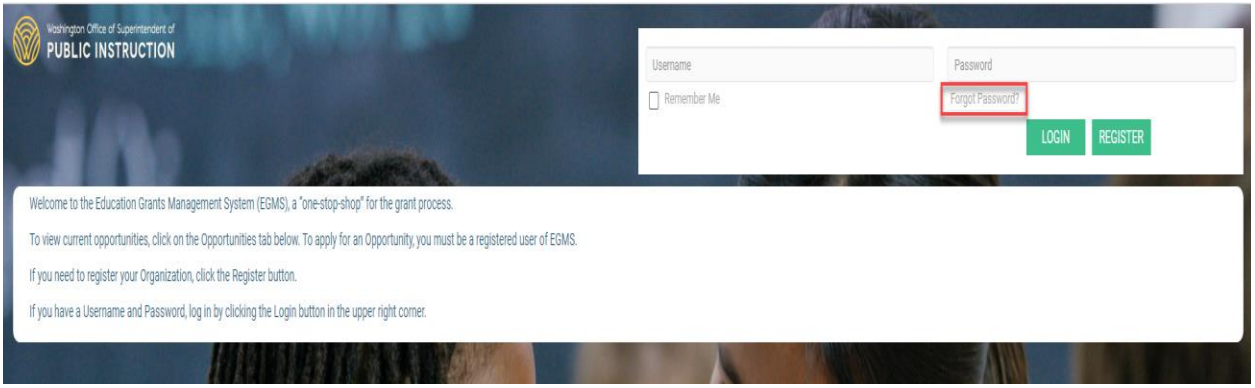


Figure 22: Forgot Password

In the next screen, enter your username and click the Reset Password button.

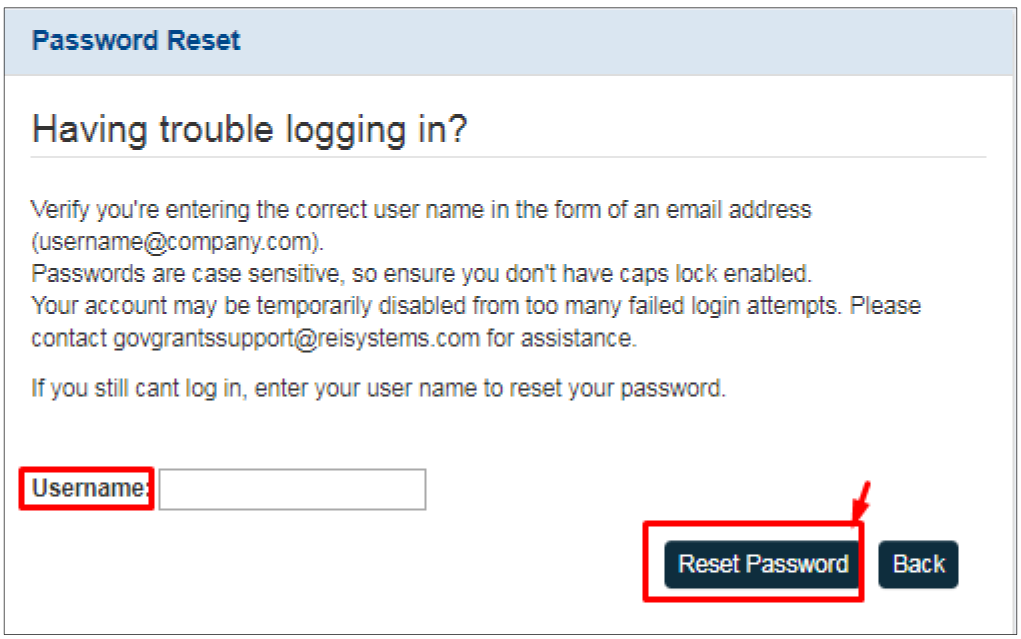


Figure 23: Password Reset

The next page will show a confirmation message, and an email will be sent to the email address associated with your user record.

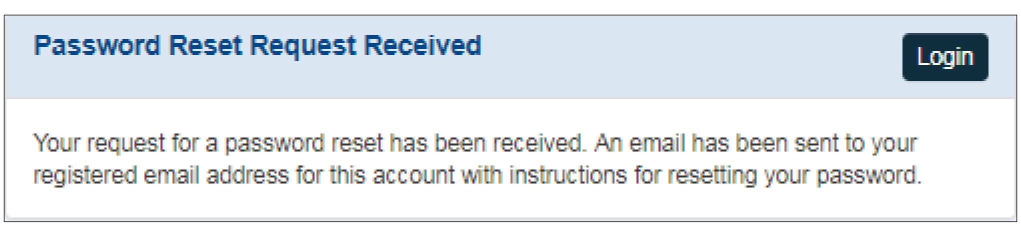


Figure 24: Confirmation Message

The email sent to your email address will contain a link to change your password and allow you to log in to the EGMS recipient portal.

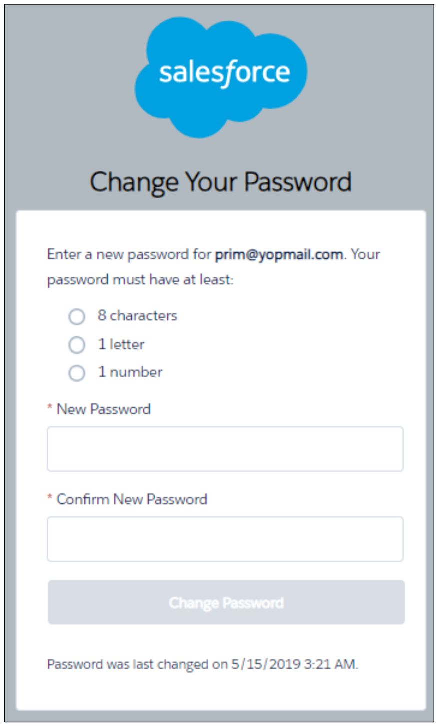


Figure 25: Entering New Password

6 CREATING USER ACCOUNTS

The EGMS allows you to create accounts for users within your organization.

6.1 INVITING USERS TO REGISTER

Only District Administrators are able to invite other users to register. From the Home page, click the 'Organization Profile' link under **Organization** in the left-hand navigation menu. On the Recipient Organization page, navigate to the **Contacts** section and click the **New** button.

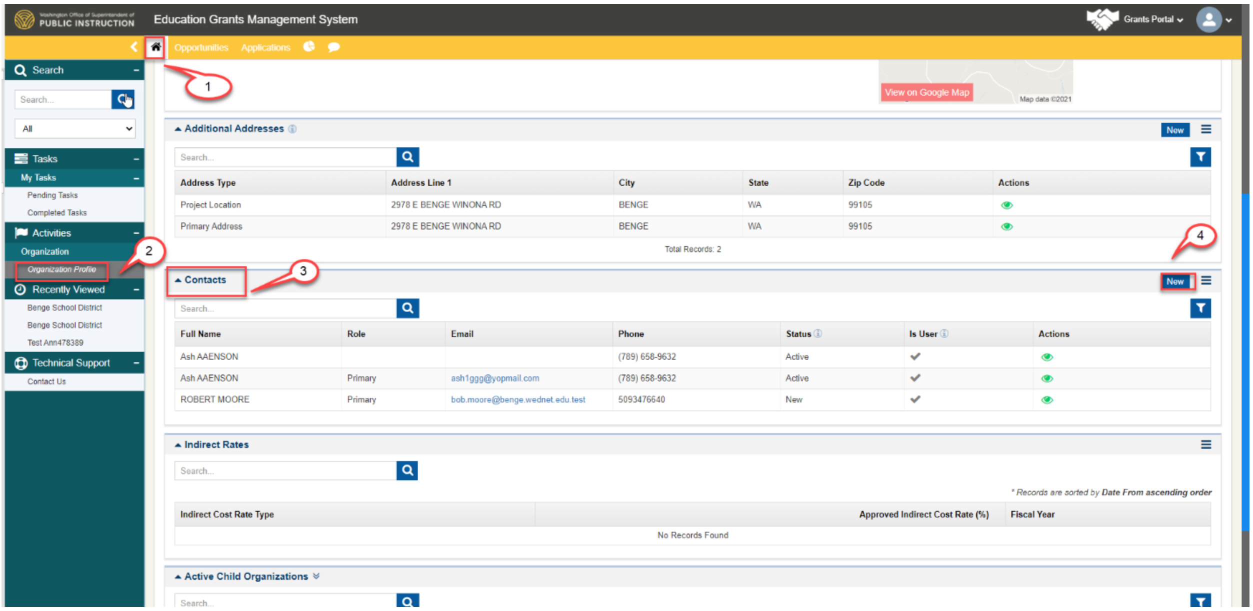


Figure 26: Organizational Profile – Contacts Section

On the Create 'New Contact' modal, enter the required information and any additional information on hand. Once complete, click the **Save** button.

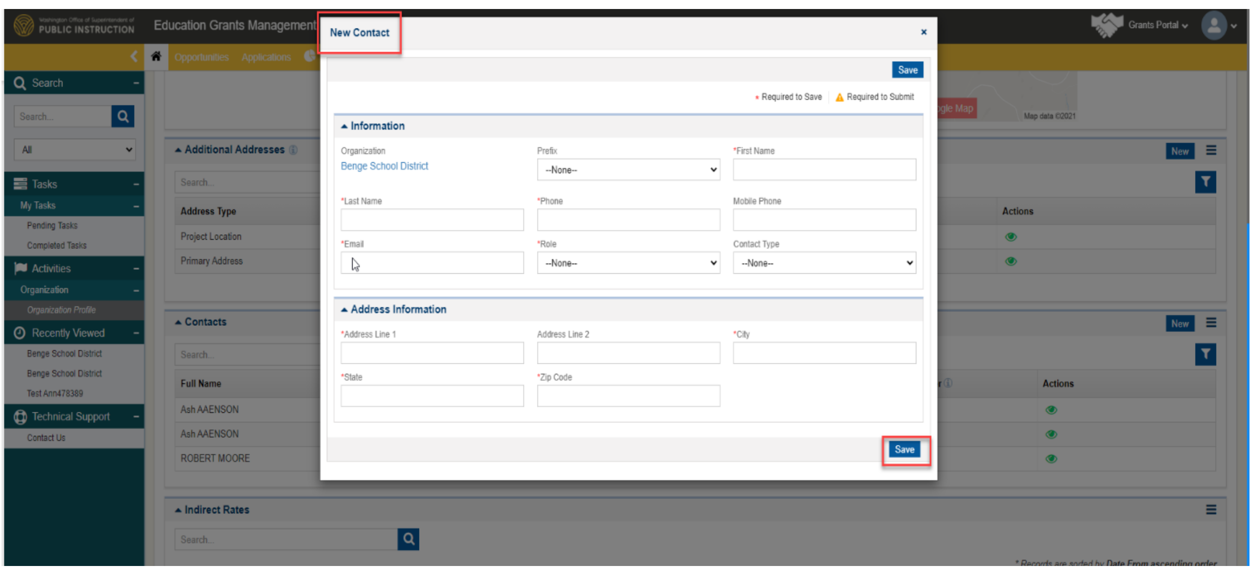


Figure 27: Creating a New Contact

The newly created contact will be displayed in the **Contacts** section of the **Organization Profile**. To send the invitation to the contact you created click the Send Invitation icon under **Actions.**

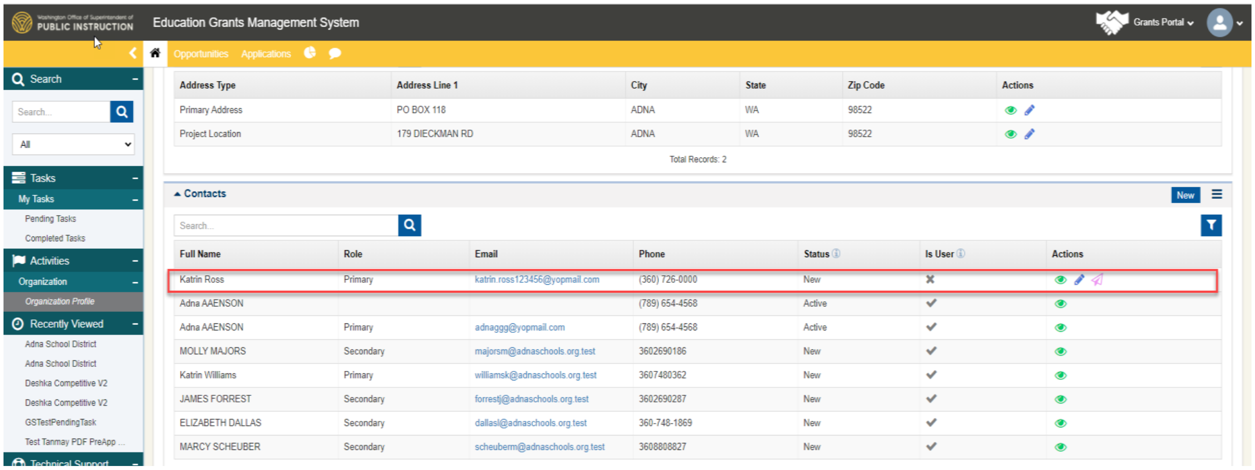


Figure 28: Registration Invitation

The system will open the Invitation email to send to the user to complete the registration process. Review the template and make revisions, if needed. Once complete, click the **Send** button. The status of the contact will change to **Invitation Sent** and the **Role field is read-only.** If a user wants to change the role where the registration process is in progress the Admin must delete the contact and resend the registration request.

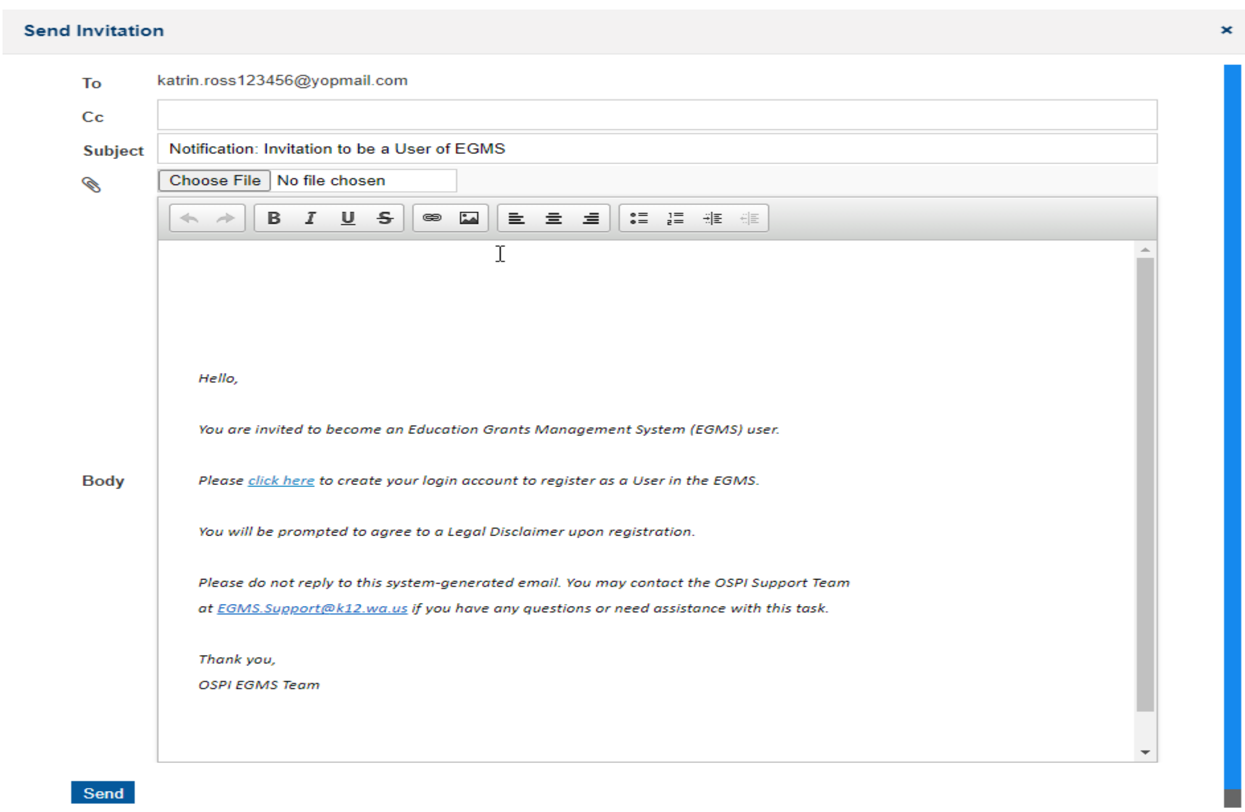


Figure 29: Send Invitation

7 EGMS SYSTEM LAYOUT

The System is broken down into the following sections:

- Top Navigation Panel
- Left-hand Navigation Menu
- Dashboard Widgets
- My Workspace

7.1 TOP NAVIGATION PANEL

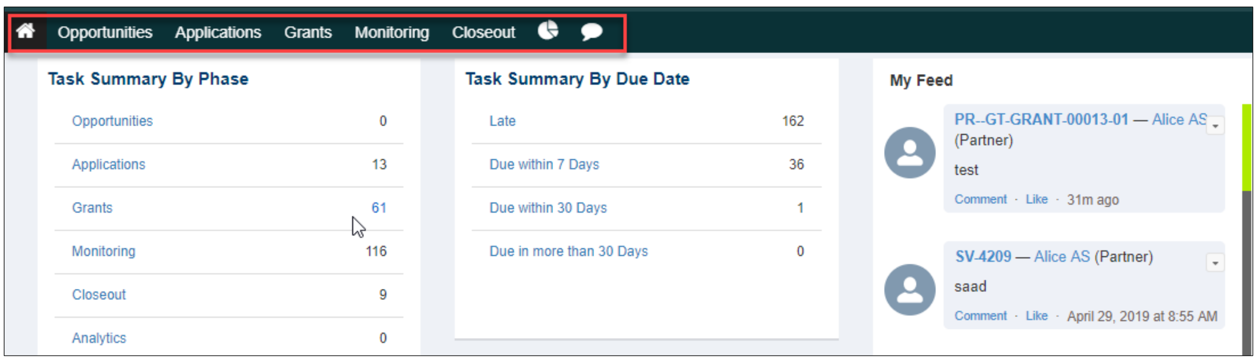


Figure 30: Top Navigation Panel

The Top Navigation Panel provides users with access to the following modules within the EGMS.

- Home
- Opportunities
- Applications
- Grants
- Monitoring
- Closeout
- Collaboration (Collab)

7.2 LEFT-HAND NAVIGATION MENU

The Left-hand navigation menu is present throughout the system; however, the sections and links within the menu are dynamic depending on the system module.

7.2.1 MY TASKS

Tasks are used throughout EGMS to ensure internal users and recipients are aware of required action. Tasks are accompanied by email notification. Clicking the link in the email provides the same action as executing a task.

Once a task is executed, whether by email or by completing a pending task, the task is removed from the pending list and placed in the completed task list.

All tasks that are currently assigned to you and open tasks assigned by you can be viewed.

Regardless of who is receiving the task or what the task is, all tasks can be found in the same place and behave in the same way.

Tasks can be found by clicking on the My Tasks option in the Navigation Bar.

My Tasks section is available across all system modules and provides users access to their pending and completed tasks and users can reassign their tasks.

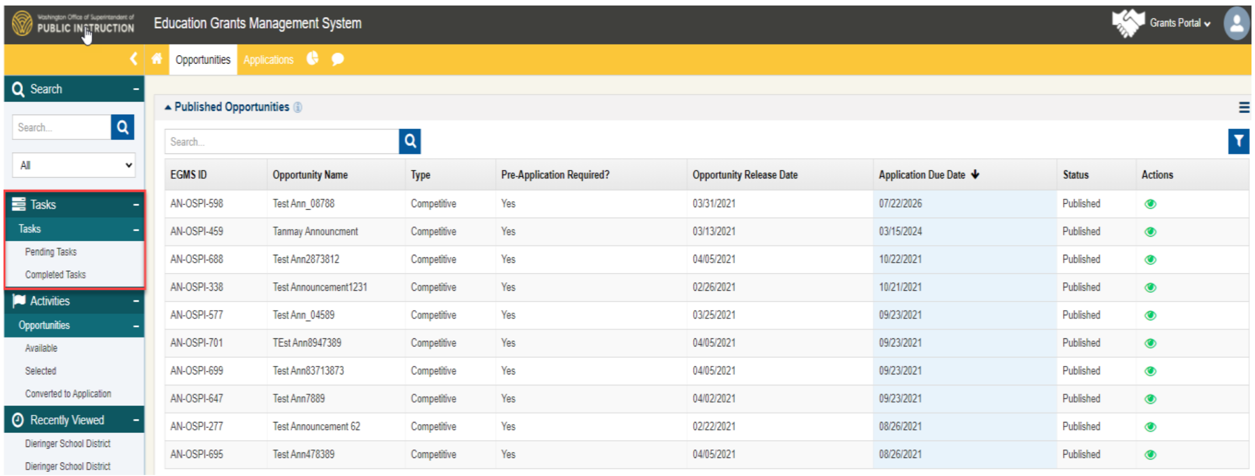


Figure 31: My Tasks

Once selected, your Pending Tasks (Assigned to Me) will appear. Please note the following:

- The EGMS ID identifies the actual record ID in EGMS for which the task is created
- The Type column identifies the type of task
- The Subject column provides additional context for the task
- The Assigned By column identifies the user who assigned the task to you
- The Due Date indicates the timeline for completing the task

Executing a Task is simple. Just select the Green **Play** arrow that appears under the Actions column. Once selected, the action will appear. Typical actions include create, complete and peer reviews.

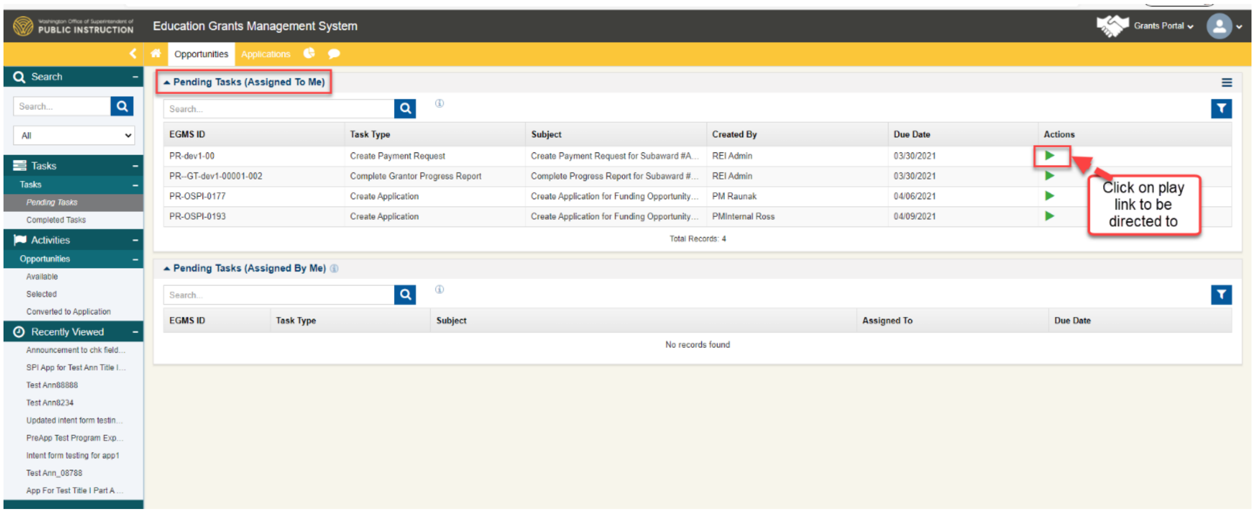


Figure 32: My Pending Tasks

7.3 DASHBOARD WIDGETS

The Home dashboard provides users with several widgets that provide information regarding their assigned tasks and funding opportunity information.

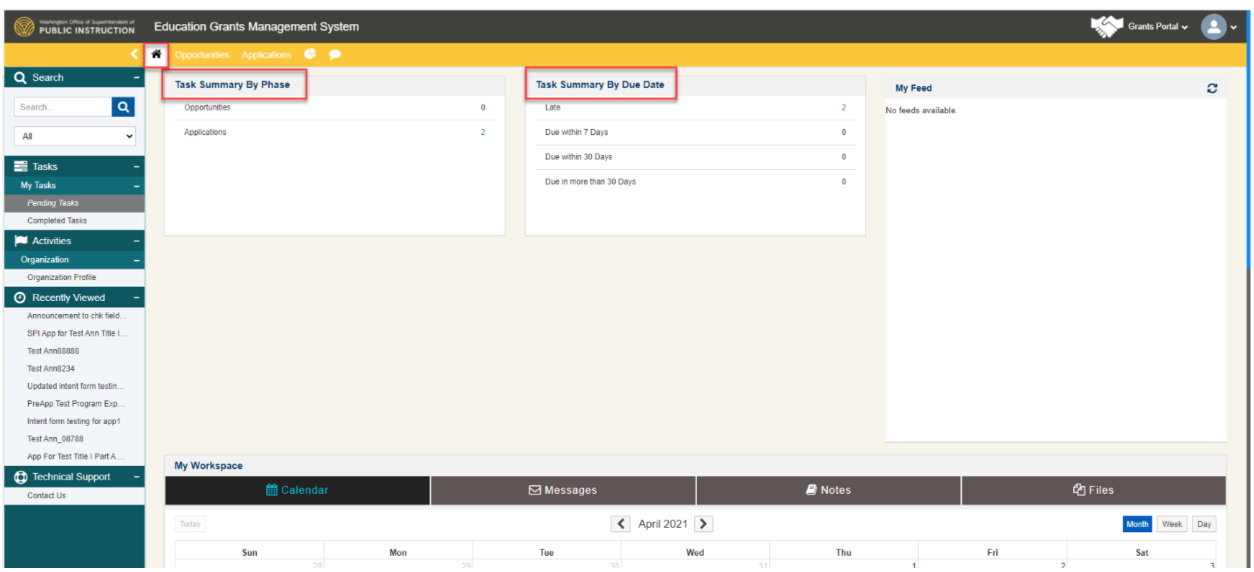


Figure 33: EMGS Dashboard Widgets

7.3.1 TASKS SUMMARY BY PHASE

The **Tasks Summary by Phase** widget provides you with the tasks assigned to them broken down by the system's modules listed in the Top Navigation Panel.

Task Summary By Phase

Opportunities	0
Applications	13
Grants	61
Monitoring	116
Closeout	9
Analytics	0

Figure 34: Task Summary by Phase

7.3.2 TASK SUMMARY BY DUE DATE

The **Task Summary by Due Date** widget provides you with your assigned tasks grouped by the due date of the task.

Task Summary By Due Date

Late	162
Due within 7 Days	36
Due within 30 Days	1
Due in more than 30 Days	0

Figure 35: Task Summary by Due Date

7.4 MY WORKSPACE

My Workspace section is broken down into the following sections:

- Calendar
- Messages
- Notes
- Files

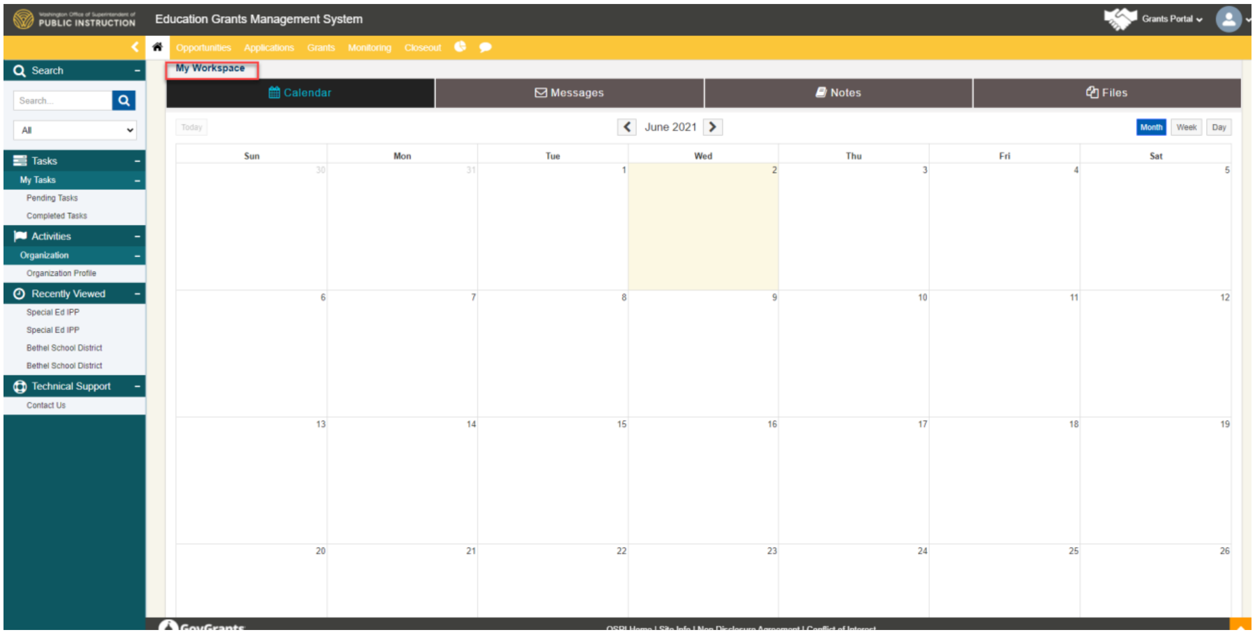


Figure 36: My Workspace

7.4.1 CALENDAR

Users can view the tasks which are completed, in progress and yet not started working on the calendar. To view the tasks users can have the option to view by month or week or day.

Different color notations are used to categorize the task status as red for not started tasks, yellow for in-progress tasks and green for completed tasks.

To view/perform the task, click on the task in the calendar.

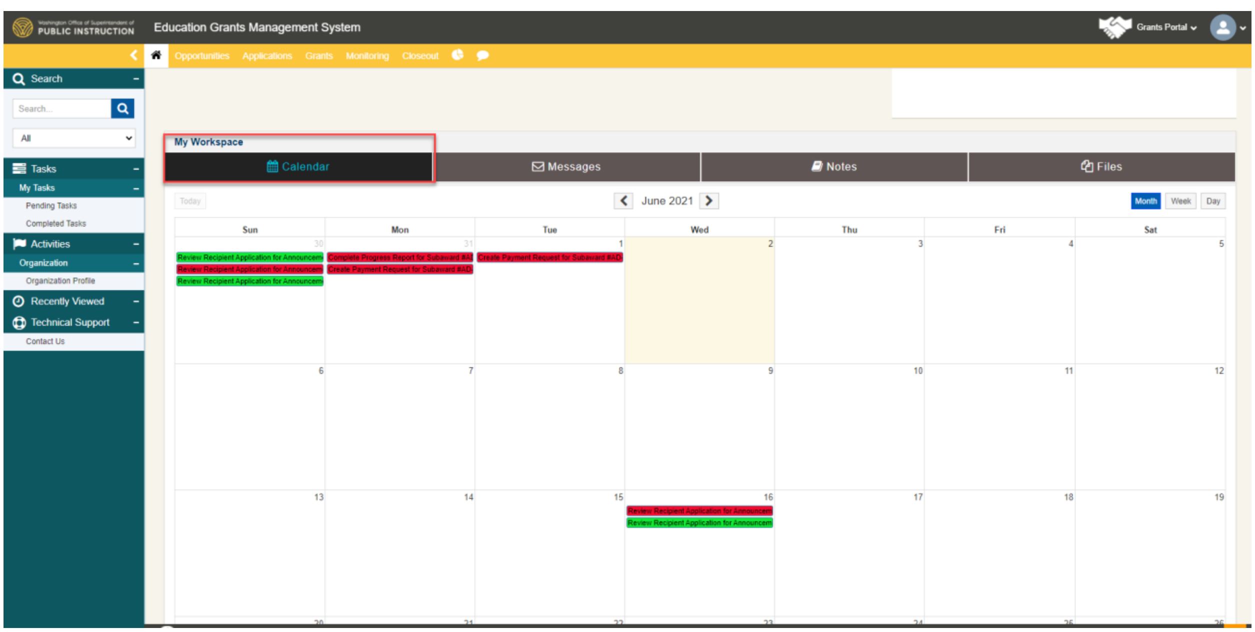


Figure 37: Calendar

7.4.2 MESSAGES

The portal allows users to send messages/ emails. The users can view the emails they have sent using the system will be displayed in the Messages section. To view and reply back to the message, click on the **View** button in the Action column.

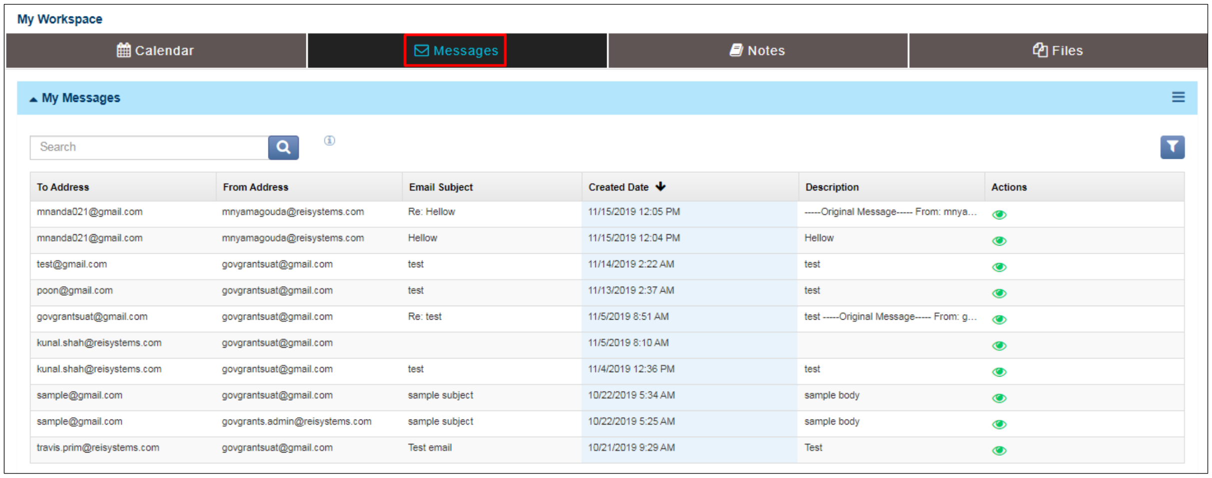


Figure 38: Messages

The reply template will auto-populate the receiver's details. On the modal window, to reply to the message, click the **Reply** button.

Figure 39: View Message Details

Once completed, click on the **Send** button.

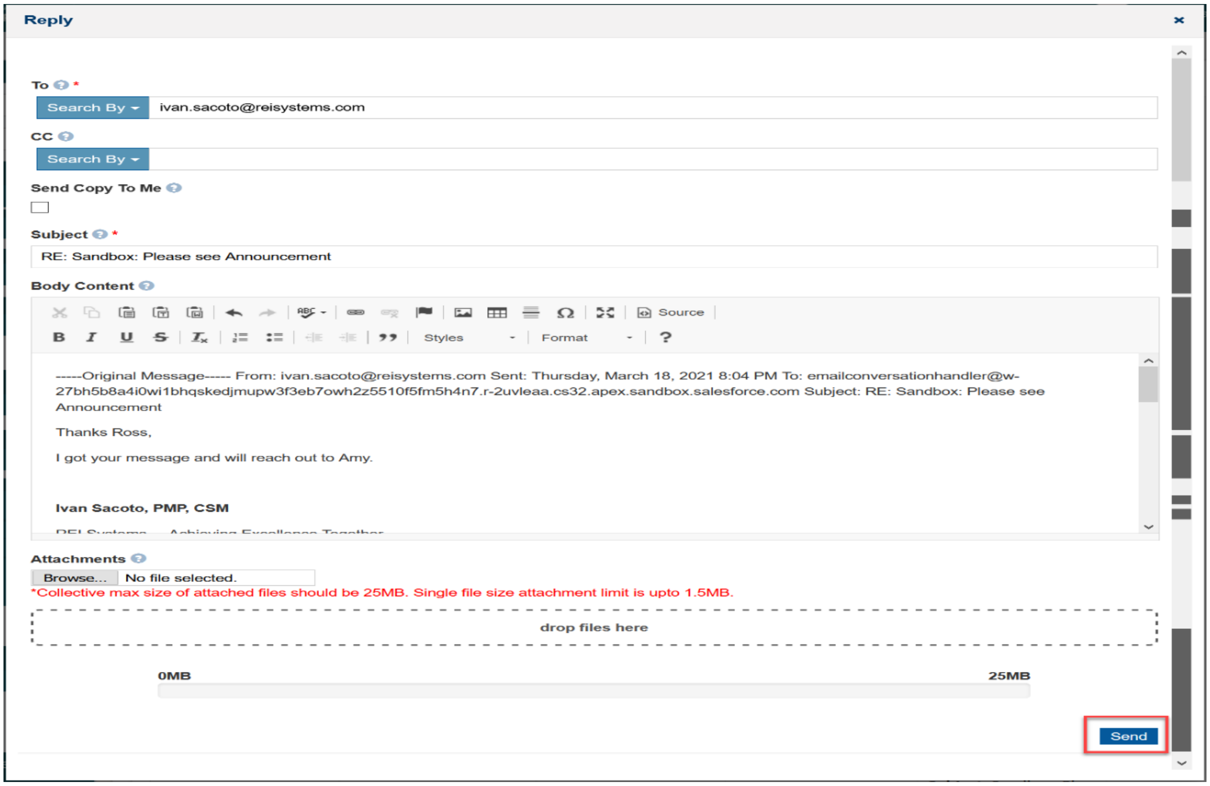


Figure 40: Send Message

7.4.3 NOTES

Notes provide users with the ability to create notes or a to-do list to help users track and manage their day-to-day activities.

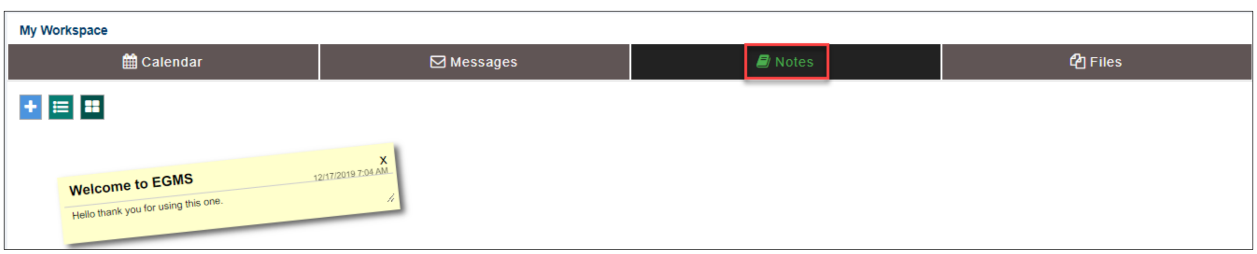


Figure 41: Notes

7.4.4 FILES

Files provide users with a centralized location for all the attachments the user has uploaded into different tasks throughout the EGMS system. Files will also house system snapshots taken by the user and a snapshot of review decisions.

- **Snapshot** - In addition to manually taking a snapshot, the system will automatically capture a snapshot of a record once you submit a record for further review. To access a snapshot, you have taken or a snapshot automatically captured by the system, navigate to the *Snapshot History* section within the History tab for a specific record. You can also access a *Snapshot under the Files* section of *My Workspace*.

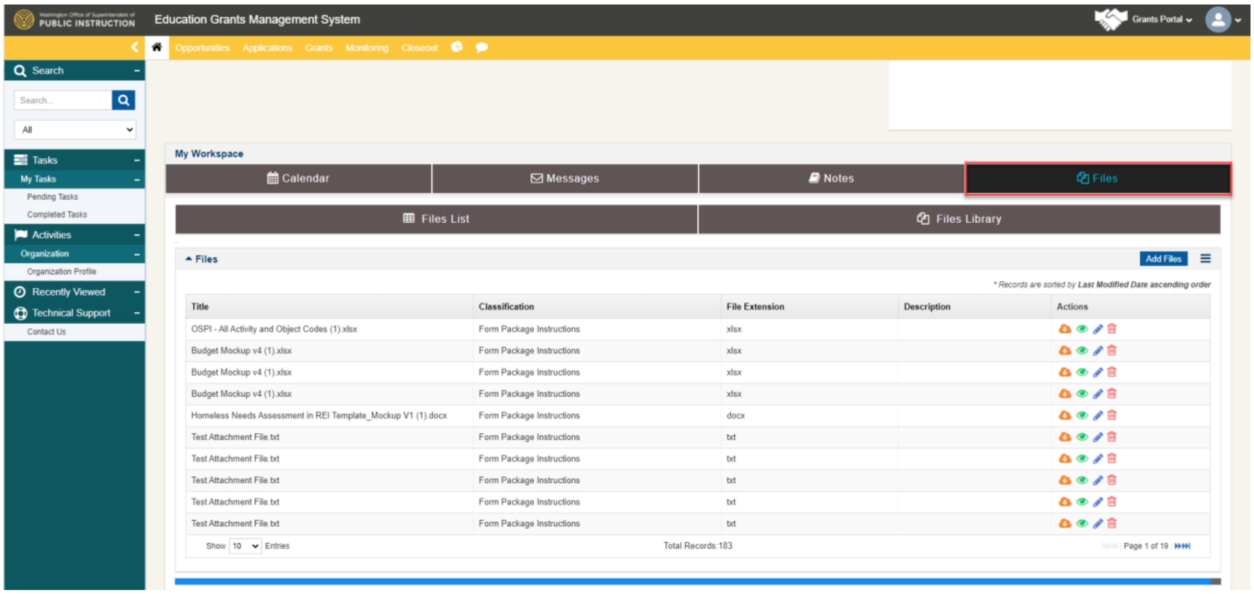


Figure 42: Files

8 OPPORTUNITIES

An Opportunity is a publicly available document/information by which an agency makes known its intentions to award grants to support an initiative and progress education efforts throughout the state of Washington.

8.1 VIEWING OPPORTUNITIES

Login to the EGMS Grants Portal. Click on the **Opportunities** module and click the '**Available'** Opportunities link under **Opportunities** in the left-hand navigation menu. The content page will list all open and closed published Funding Opportunities. Note that you can filter the list by clicking on the double arrow filter icon  displayed next to the title of the table.

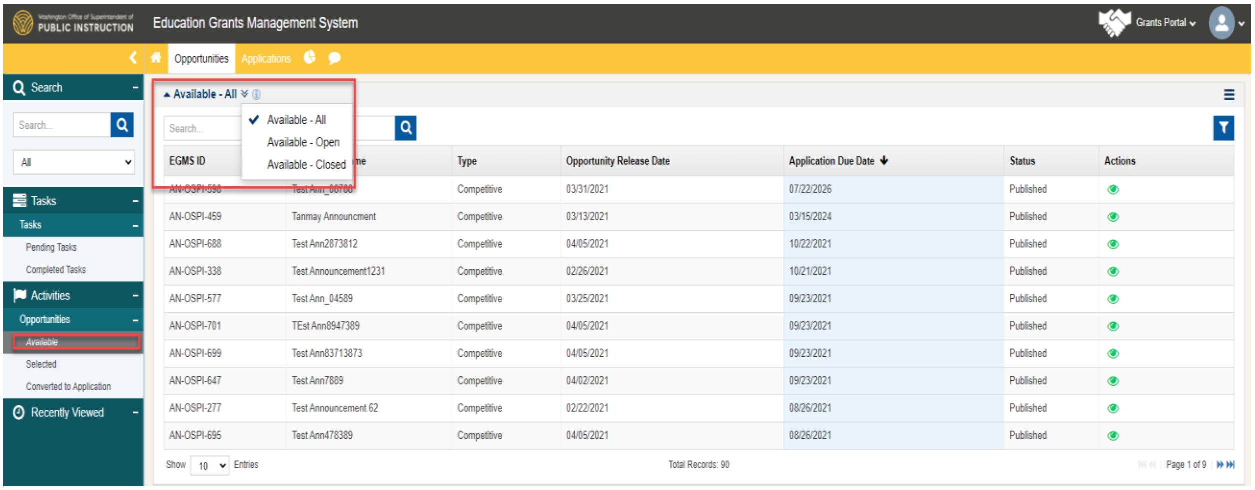


Figure 43: Available Opportunities

To view additional details for a Funding Opportunity, click the **View** icon under the **Actions** column for the opportunity you want to view.

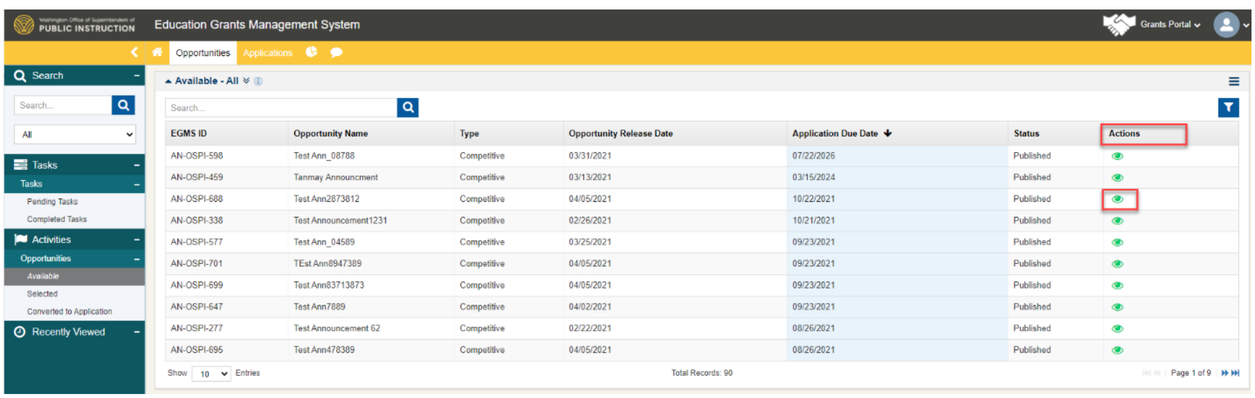


Figure 44: View Additional Details for a Funding Opportunity

8.2 QUALIFIED OPPORTUNITIES

After selecting to view an opportunity, within the Opportunity pages, review the Funding Opportunity details within all tabs to determine if your organization will apply for the grant. If your organization would like to apply for the Funding Opportunity, click the **Qualify** button at the top right of the page. The system will refresh the page and display a **Create pre-application** or **Create application** button on the top right of the page. Note that all qualified opportunities are stored under the 'Selected' link on the left navigation menu. So, if you leave the opportunity after qualifying it you can find your qualified opportunity by navigating to the Opportunities section on the left navigation menu and clicking on the 'Selected' link. You can then open your opportunity by clicking on the view icon under the 'Actions' column next to your opportunity.

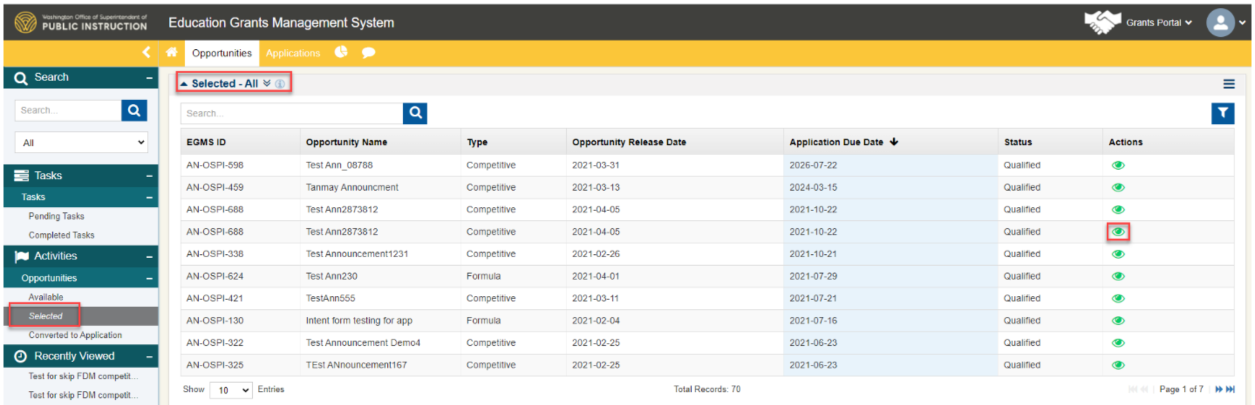


Figure 45: Qualify Funding Opportunity

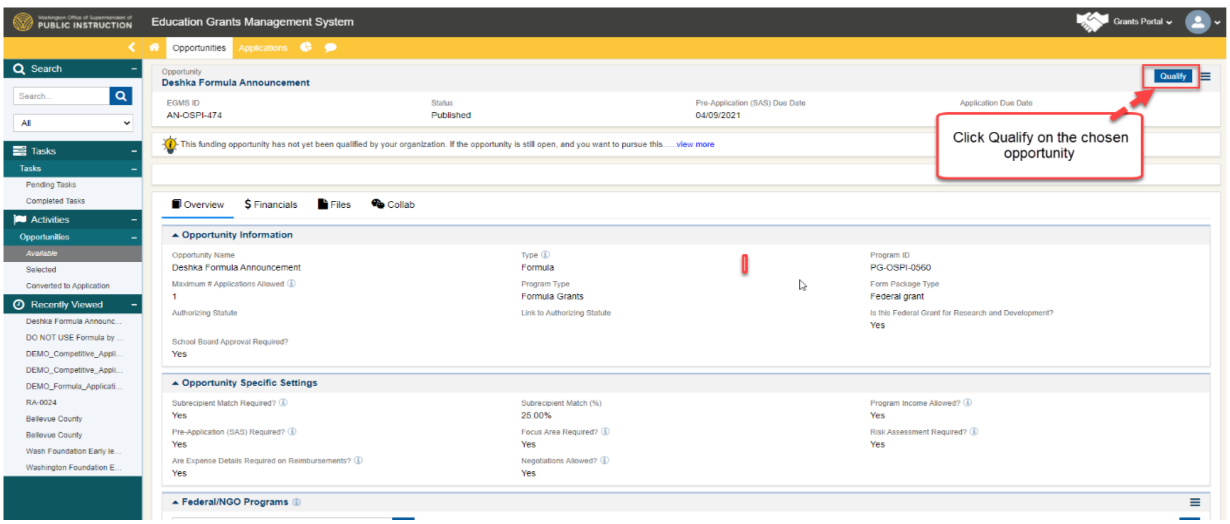


Figure 46: Qualify Funding Opportunity

The Opportunity is now in a **Qualified** status, and your organization can now proceed with the creation of the Pre-Application.

8.3 GENERAL ASSURANCES FORM

Each Fiscal Year a new Assurances form must be submitted. Go to the Organizational Profile and click on the Assurances tab.

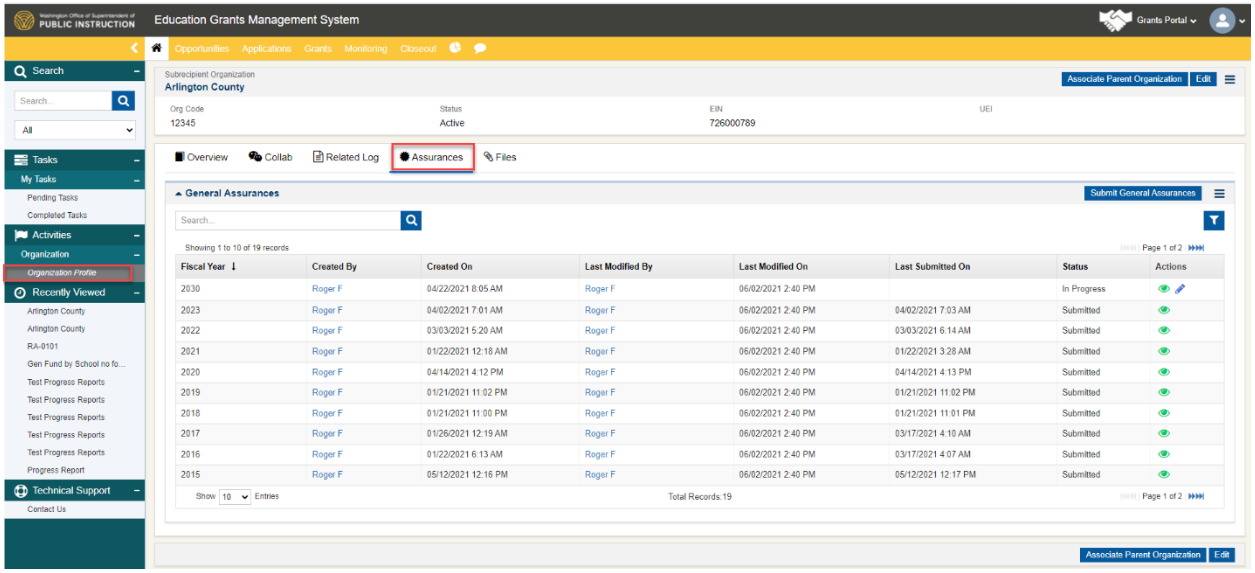


Figure 47: Assurances

Click on Submit the General Assurances and click on the Fiscal Year to select the final year of the fiscal year that you want to be represented. For example, select 2021 for the 2020-2021 fiscal year.

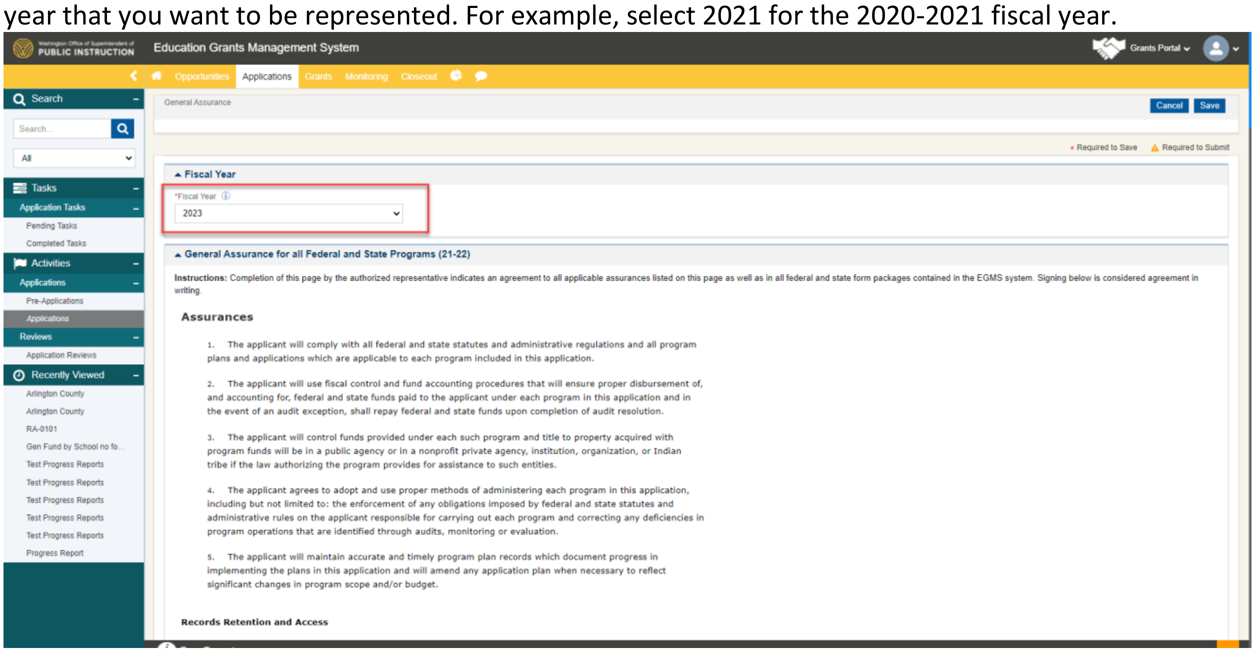


Figure 48: Assurances Fiscal Year

Scroll down and complete the Certification by filling out the required information- **Authorized Representative, representative Title, Agreed on, Superintendent/CEO Representative, and Agreed on date.** Once this is completed, click on **Save**.

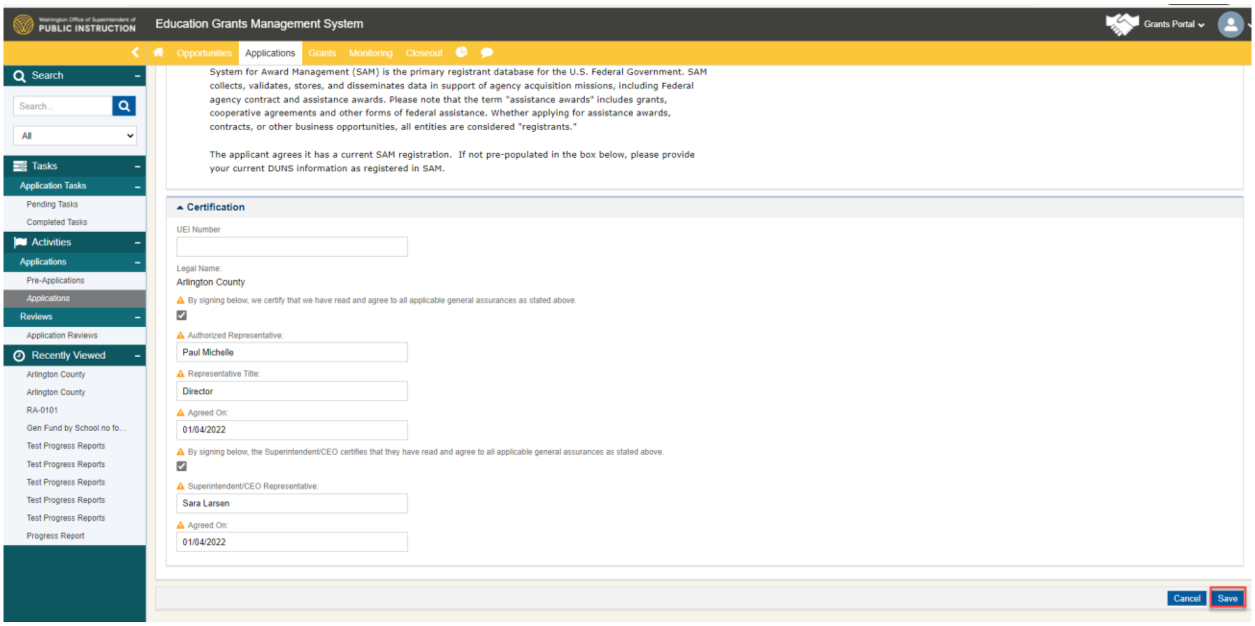
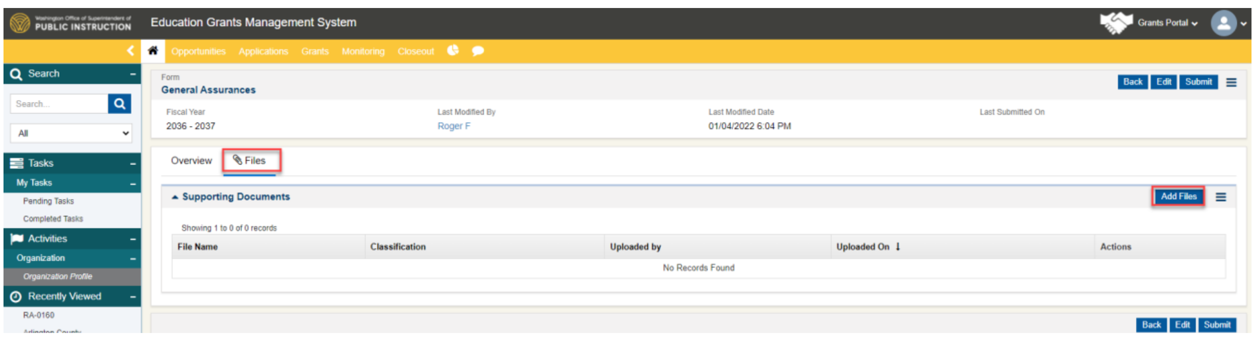
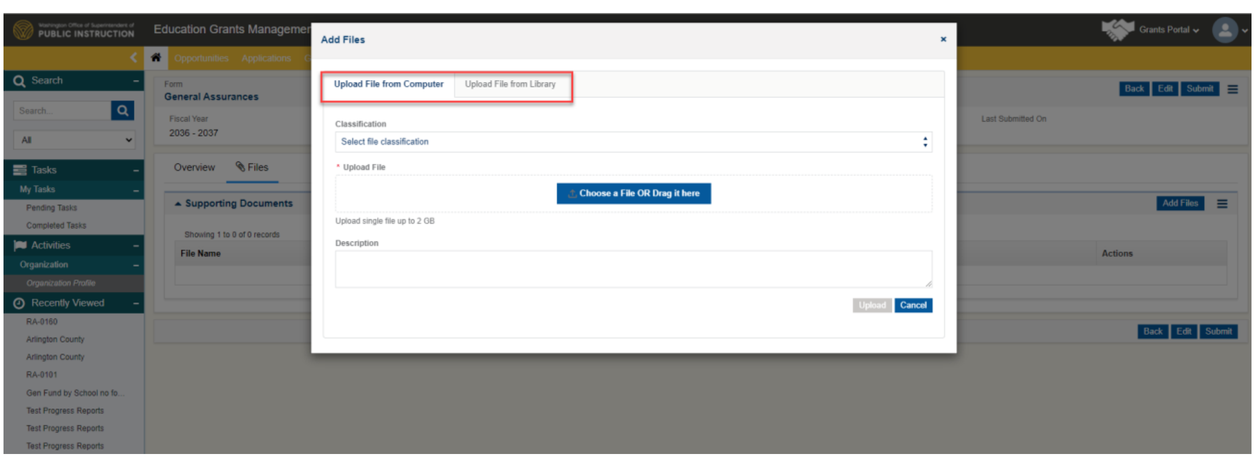


Figure 49: Certification

Navigate to **Files** tab, to add the documents – optional step. Click **Add Files** button to add the document. A new modal window opens, and you can choose to **Upload File from a Computer or Upload a file from Library**.





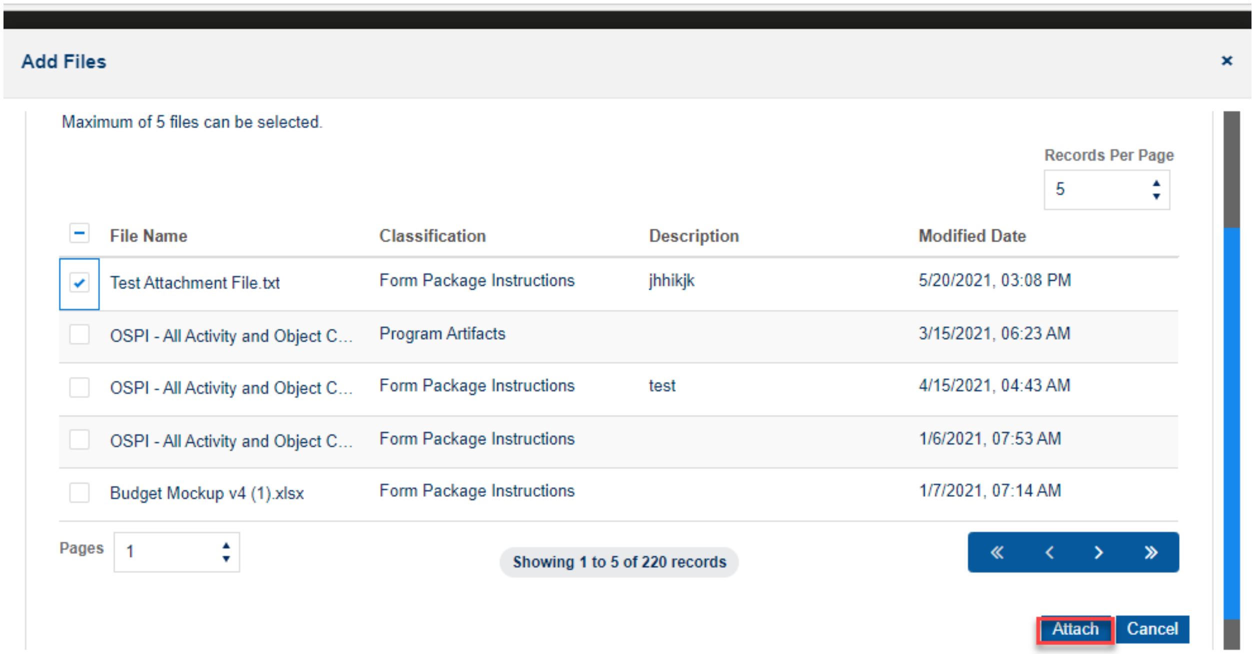


Figure 50: General Assurances Files

After completing all requirements click on **Submit**.

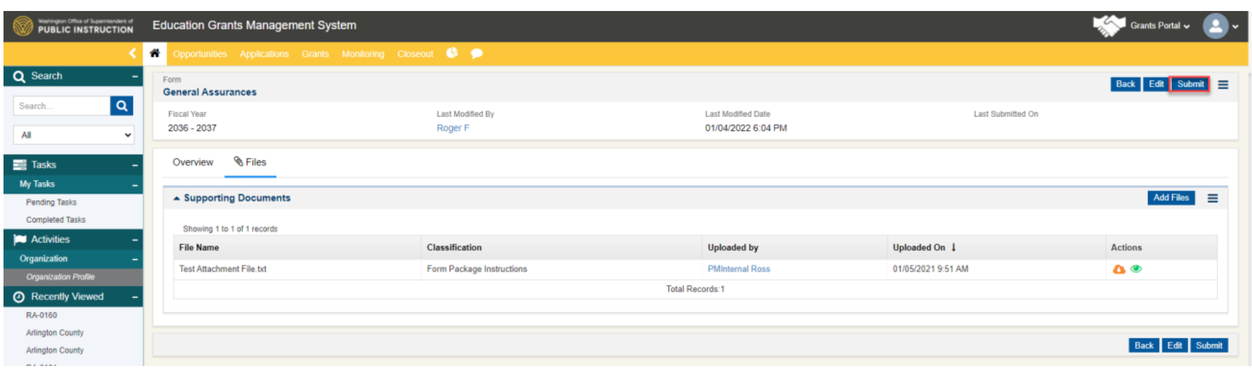


Figure 51: Submitting the General Assurances Form

8.4 CONVERTING OPPORTUNITY TO PRE-APPLICATION

Once the Opportunity is qualified, the system will present you with the **Create Pre-Application** (If Required) and **Create Application** buttons.

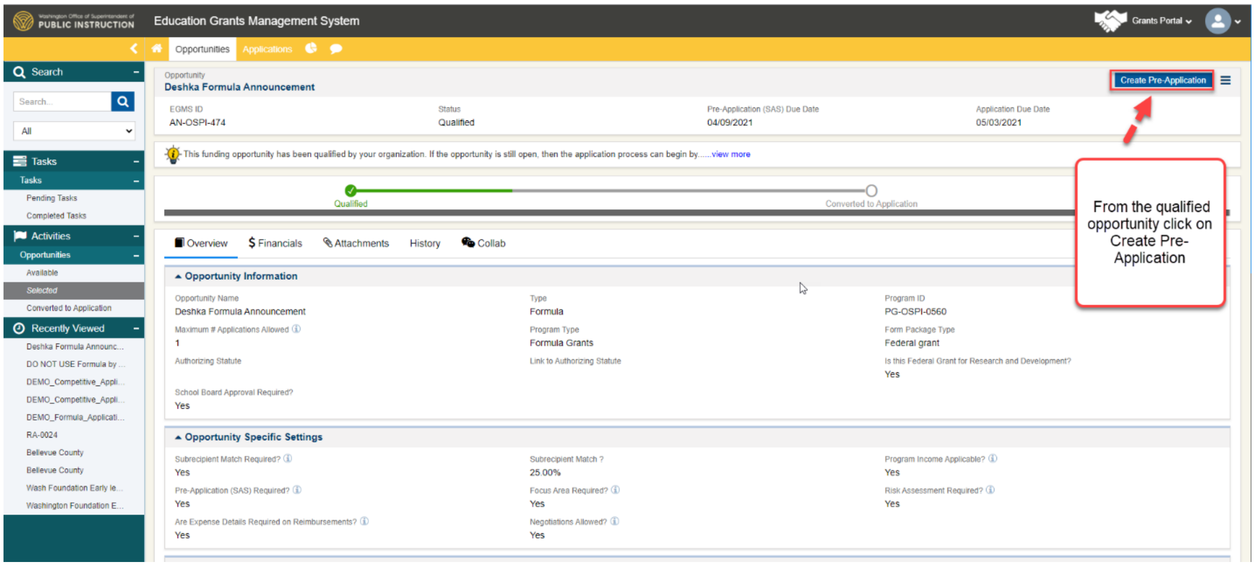


Figure 52: Create Pre-Application

- If Pre-Application is required, click the Create Pre-Application button.
- If Pre-Application is not required, click the Create Application button.

9 APPLICATION

9.1 COMPLETING A PRE-APPLICATION

After clicking the **Create Pre-Application** button to convert the opportunity to a Pre-Application, the system directs you to the Create Pre-Application modal window. On the Create Pre-Application modal, the title will be auto populated but is editable. Click the **Save and Continue** button to add further required details.

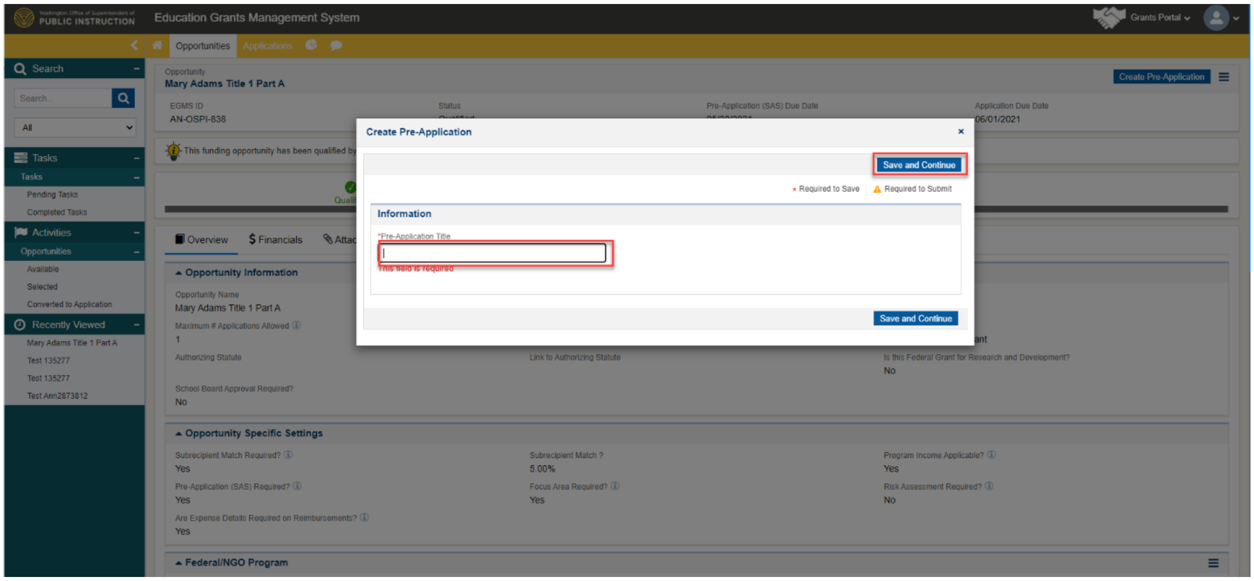


Figure 53: Create Pre- Application modal

To return to a pre-application you have been working with, navigate to the Applications tab and select Pre-application from left navigation menu. The content page will display a table with all Pre-applications. Use the quick search feature to find your pre-application by entering the pre-application title or EGMS ID. You can view or continue to edit your pre-application by selecting the pencil edit icon.

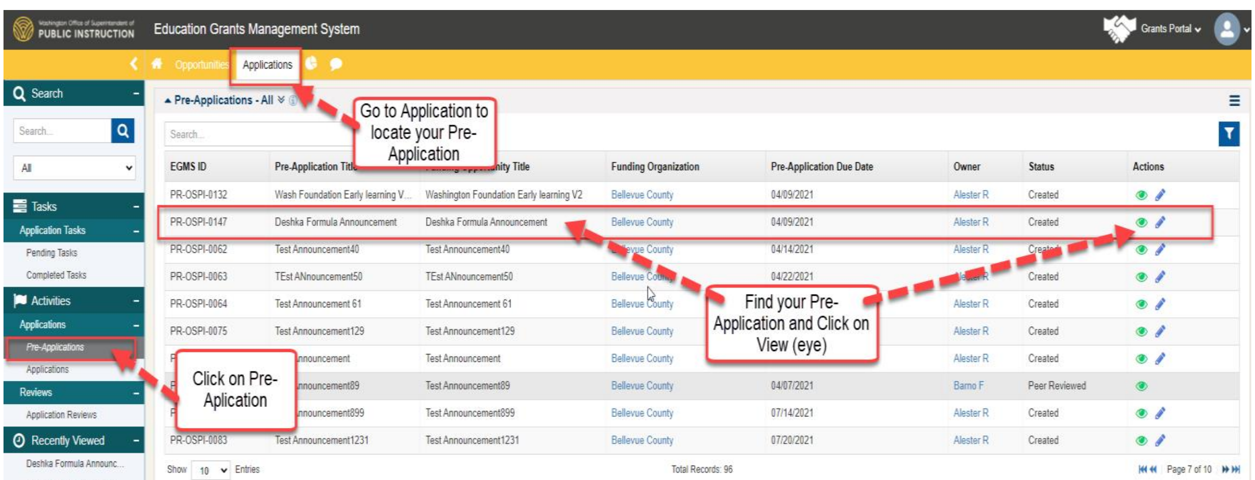


Figure 54: Locating Pre-Application

The system will direct you to the created Pre-Application page in **Edit** mode.

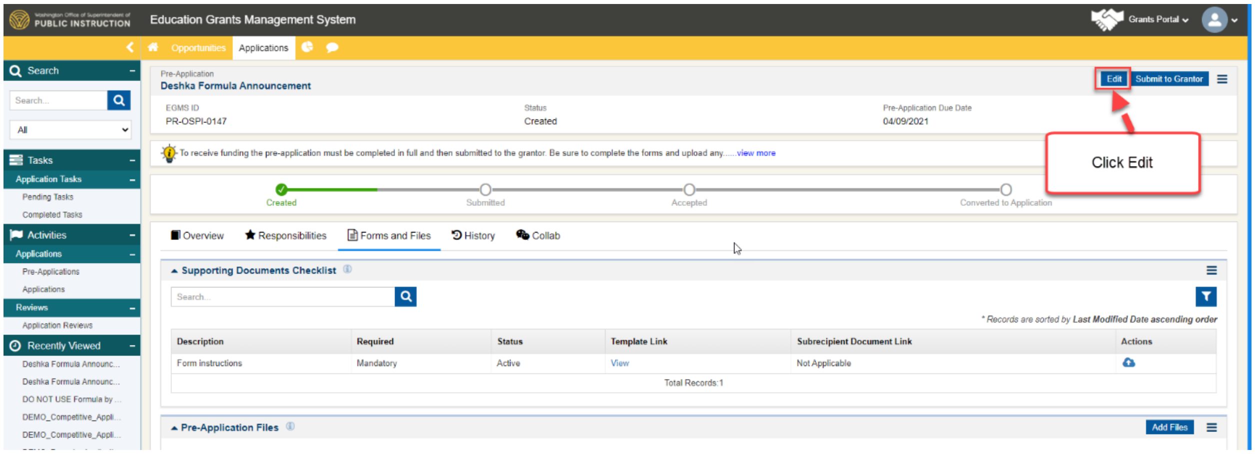


Figure 55: Edit Pre-Application

9.1.1 OVERVIEW TAB

On the **Overview** tab, navigate to the **Pre-Application Overview** section and enter the required information, such as the Pre- Application Title.

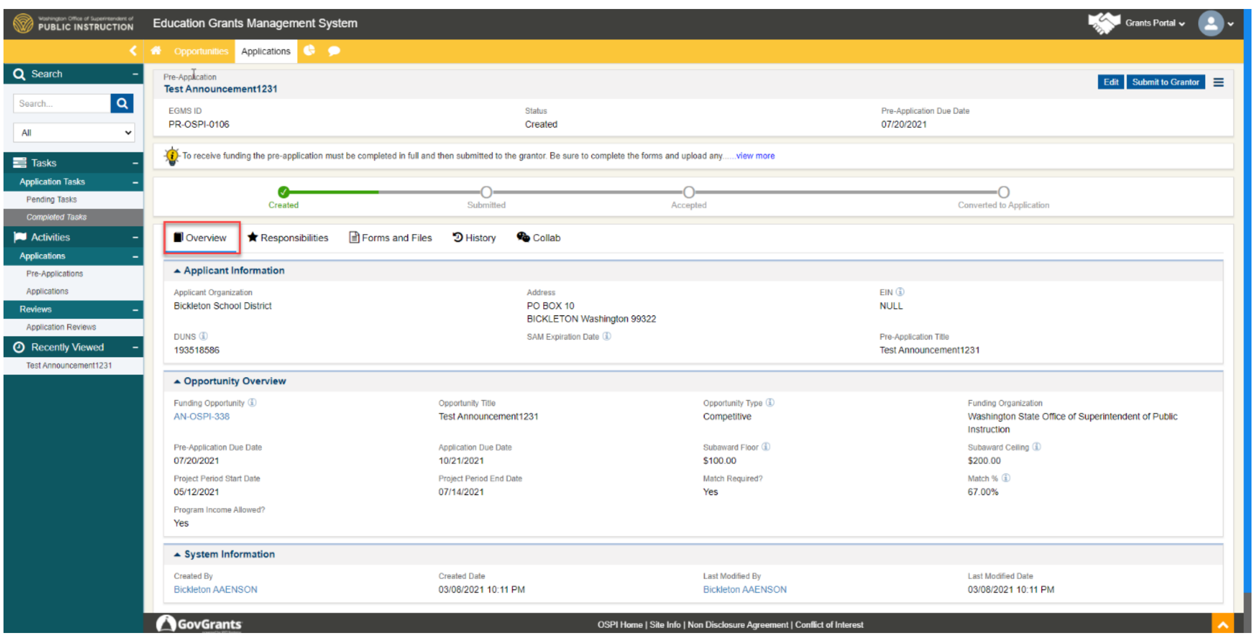


Figure 56: Complete Pre-Application Overview

9.1.2 RESPONSIBILITY TAB

In the responsibility tab you can optionally assign a peer reviewer with whom you can collaborate on this application. To assign a peer reviewer navigate to the **Responsibilities** tab and select **New** in the top-right corner. Enter **Reviewer Name, Responsibility, Description** and **Due Date** for the review. Select whether you will **Allow Record Editing** by the reviewer. By selecting "**Yes**", the reviewer will be able to edit the pre-application fields and related forms. When all reviewer details are entered, click **Save.** You can repeat the same process to add multiple reviewers.

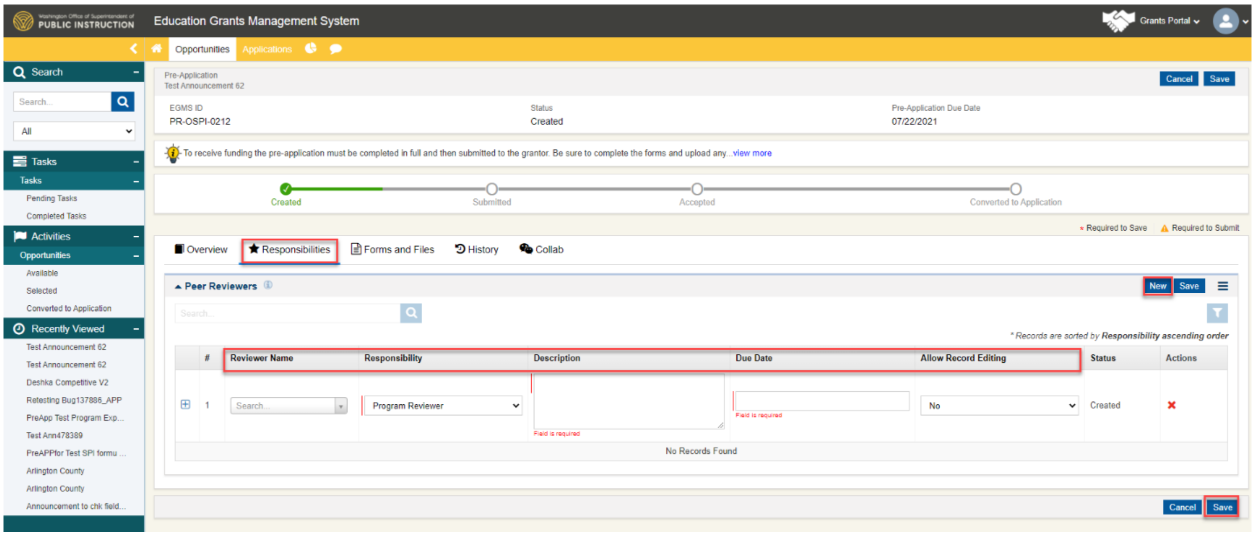


Figure 57: Adding Peer Reviewers

9.1.3 FORMS AND FILES TAB

The **Forms and Files tab** includes the following sections:

Supporting Documents and checklist section. In this section applicants can download templates provided by OSPI by clicking on the template link and upload them via the upload icon under the actions column after they have populated the template. These templates can be either mandatory or optional. I mandatory the system will not allow you to submit until you upload the completed template.

Pre-Application files section. This section allows you to upload any type of files required in the application.

Notes section. This section allows you to create and store notes that will remain as a permanent record associated to the application.

Forms section. This section includes the actual forms/pages that capture the required information necessary to apply for the award. As an applicant you are required to complete all forms listed in this section unless otherwise indicated in the opportunity.

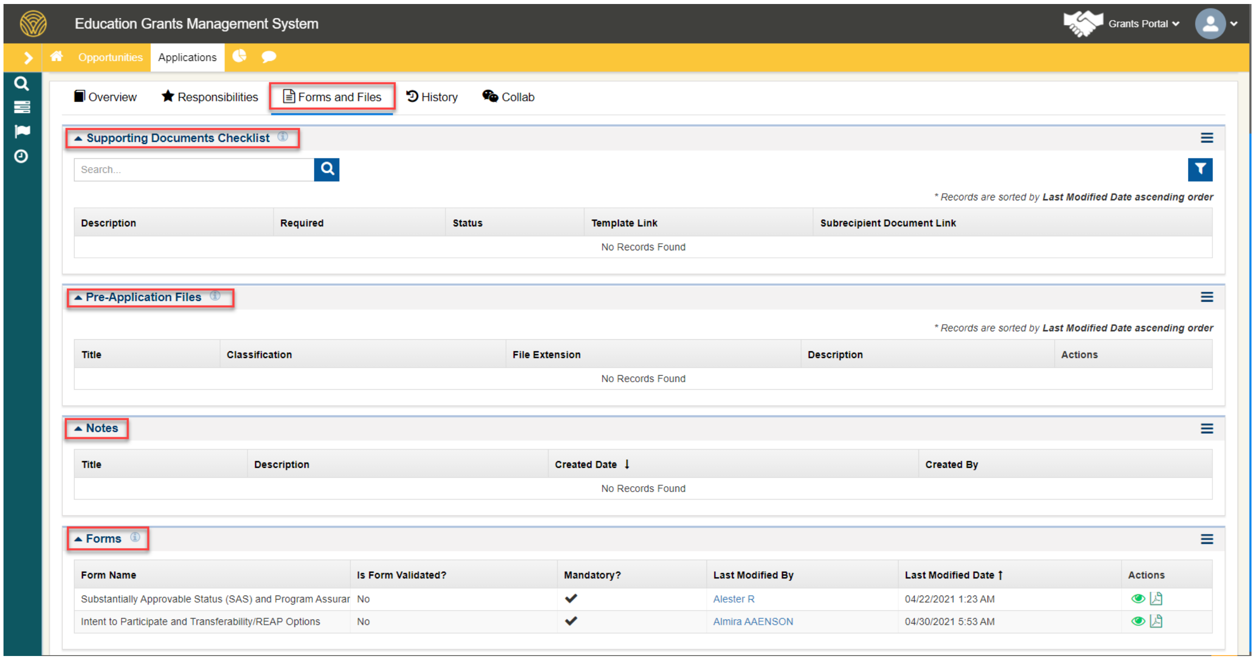


Figure 58: Forms and Files tab sections

FORMS SECTION

To complete a form, navigate the **Actions** column in the forms section where you can select to view or edit the form by clicking on the corresponding icon.

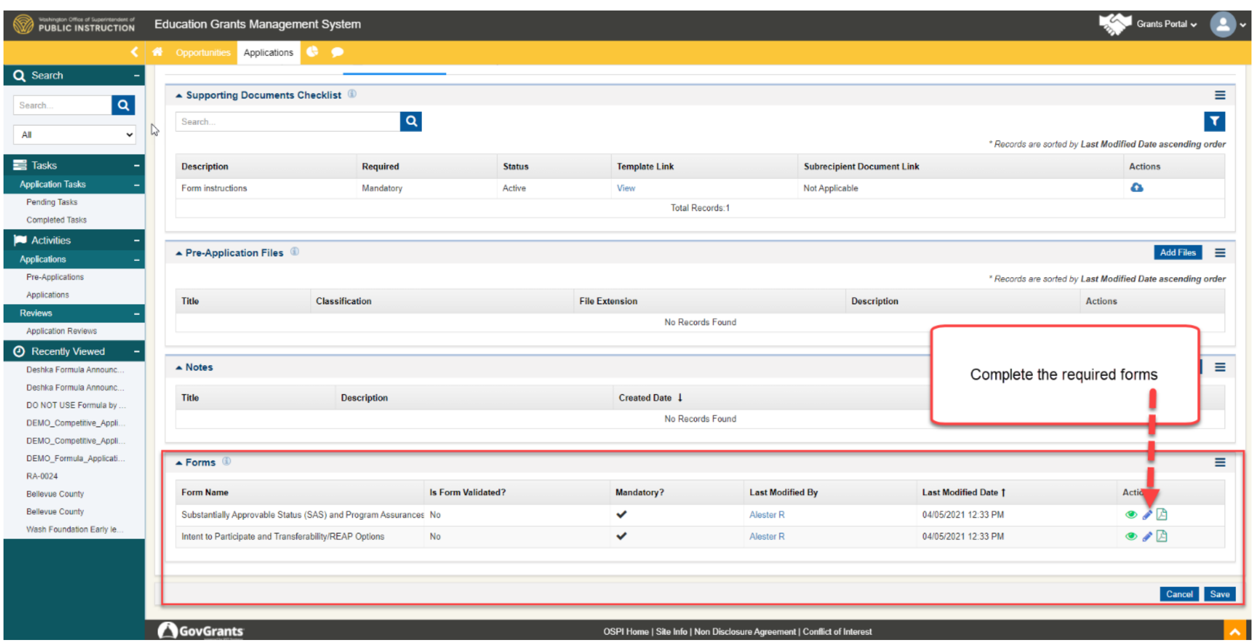


Figure 59: Edit the required forms

The following is a step-by-step example for completing a form. After navigating to the Forms section and clicking on the pencil edit icon, the system will open the form in edit mode. All forms will include a header section that includes the name of the form, validation status – yes/no, a last modified by, and last modified date. A second common section for all forms is the Organization and Pre-application/Application information section that includes the applicants organization information. The rest of the sections will be unique to each form.

The system allows you to navigate between forms via a toggle located in the top right of every form.

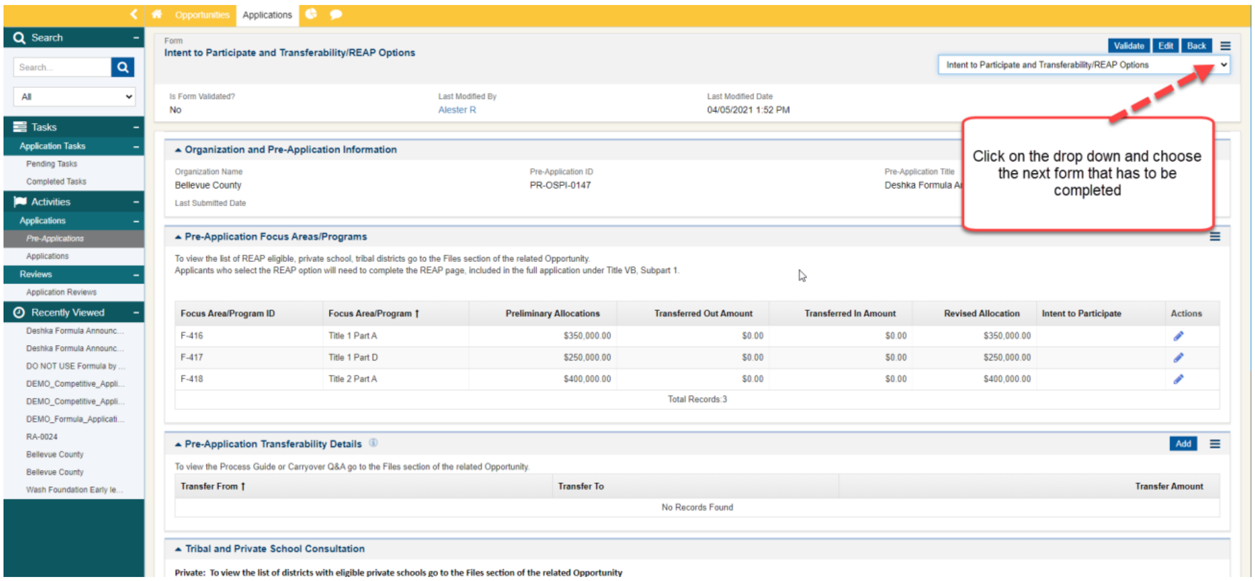


Figure 60: Completing the Intent to Participate and Transferability /REAP Options

After selecting the Intent to Participate and Transferability /REAP Options form navigate to the *Pre-Application Focus Areas/Programs* section and select the required option from the available dropdown on the **Intent to Participate** column - click on the action column on any of the available **Focus Area/Programs.**

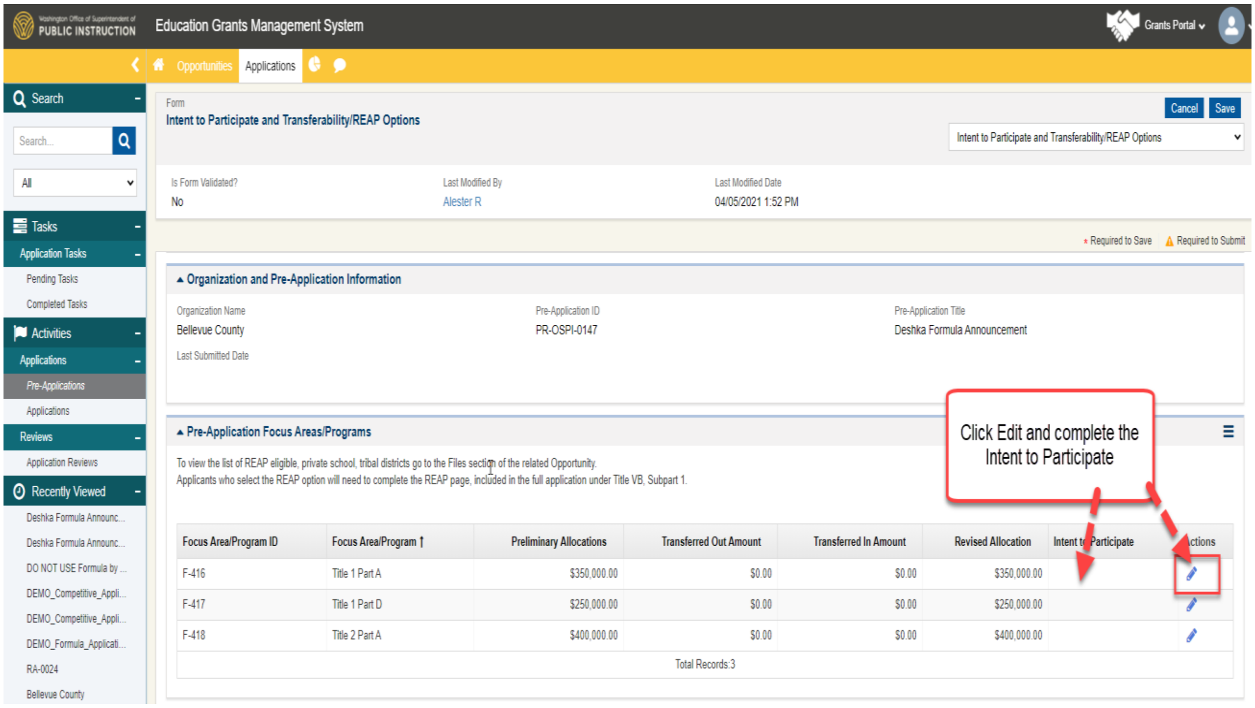


Figure 61: Intent to Participate Focus Areas/ Program

After selecting the required option from the available dropdown in the Intent to Participate column click on the **Save** button on the top of the table.

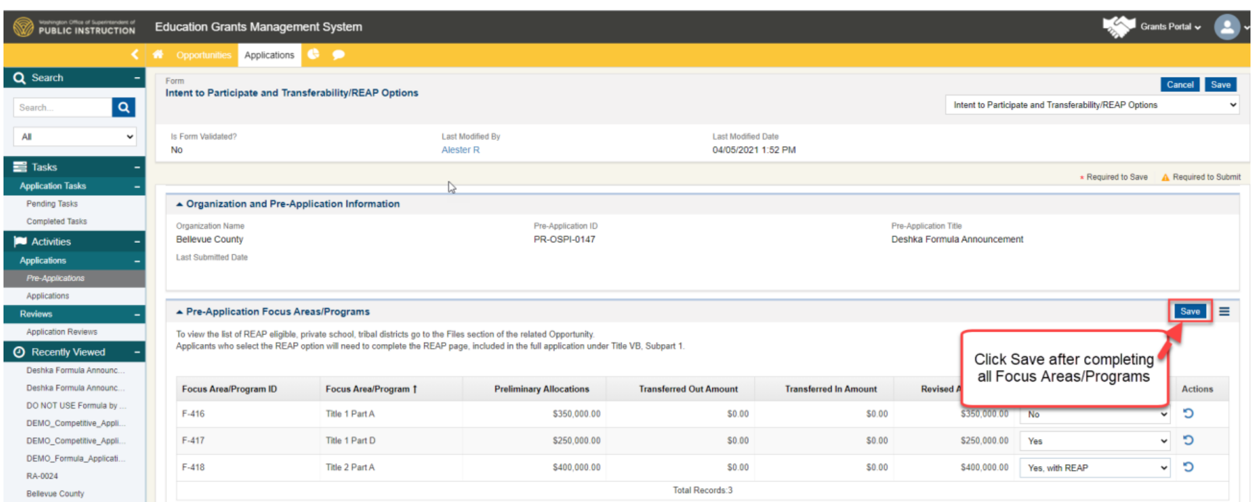


Figure 62: Saving all entered data for Intent to Participate

On the **Contacts** section, to add new contact click on the **Associate** button, select a contact from the contacts pop up window and click **Add**. Click on **Edit** icon on the action column to edit the Focus Area/ Program or title of the contact. Click on Save button. Note that the Focus Area/Program must be populated before you can validate the form.

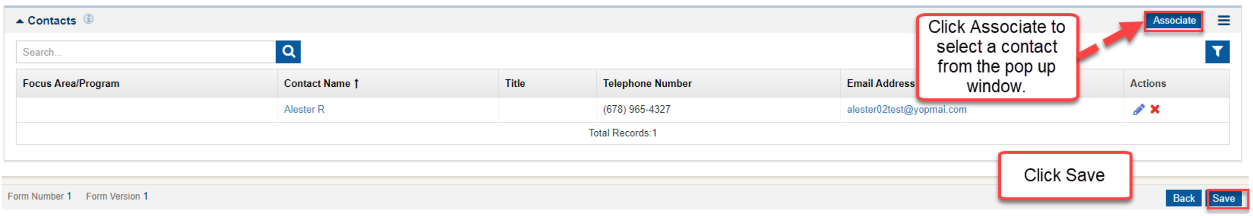


Figure 58: Associate Contact

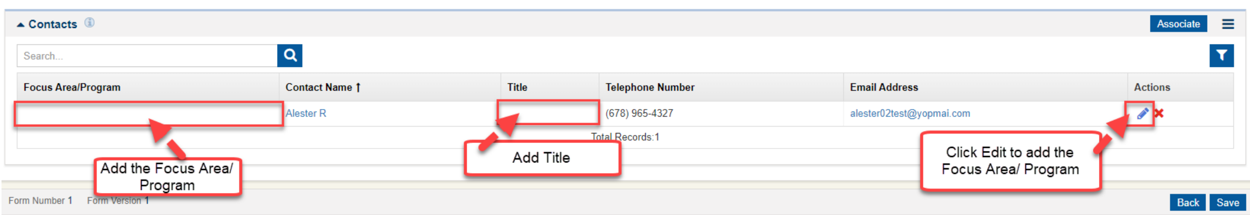


Figure 63: Edit Contact Title/ Focus Area Program

The final step when populating a form is to validate the form. To validate a form, click the Validate button available on the top right of the form. If all the required data is entered in the form, the form will be successfully validated. This does not submit the form to the grantor, it only validates that the data was entered correctly. The 'is the form validated' field will change from **No** to **Yes** when the form is successfully validated.

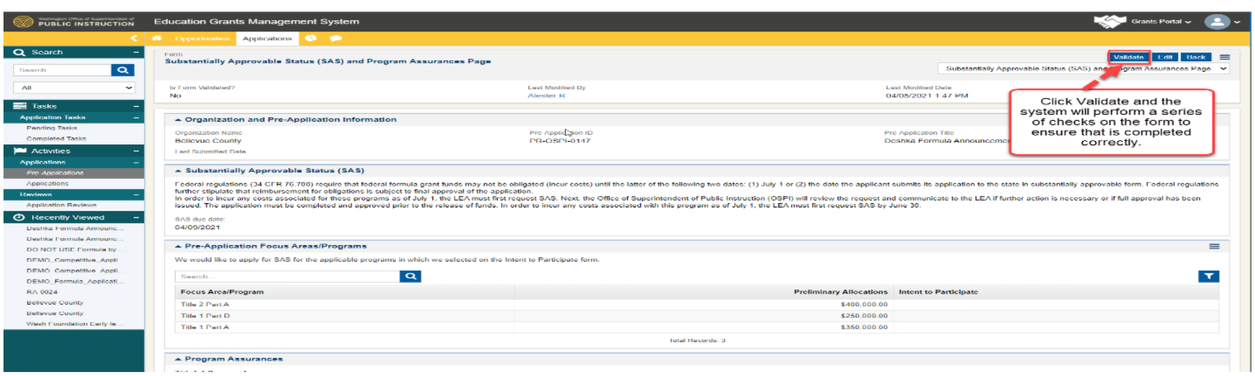


Figure 60: Validate the forms

NOTES SECTION

If you have any supporting documentation or notes that are relevant to the Pre-Application process they can be included under the Forms and Files tab. Click on **Add** to add the newly created notes.

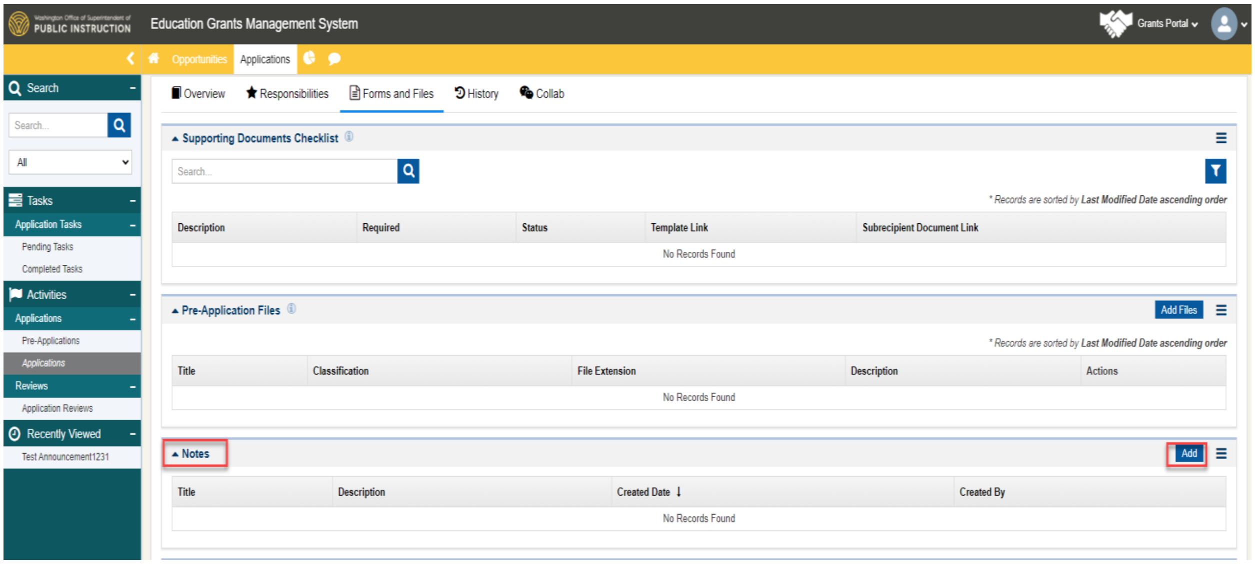


Figure 64: Add Notes

9.1.4 History tab

Navigate to the **History** tab. Once the pre-application is converted to an application, the snapshot will be attached here to download. This section will also list field history for up to 20 fields from the Pre-Application object to be tracked. The field history tracks the old value, the new value and change by and changed on values. These 20 fields are selected by OSPI when configuring the system.

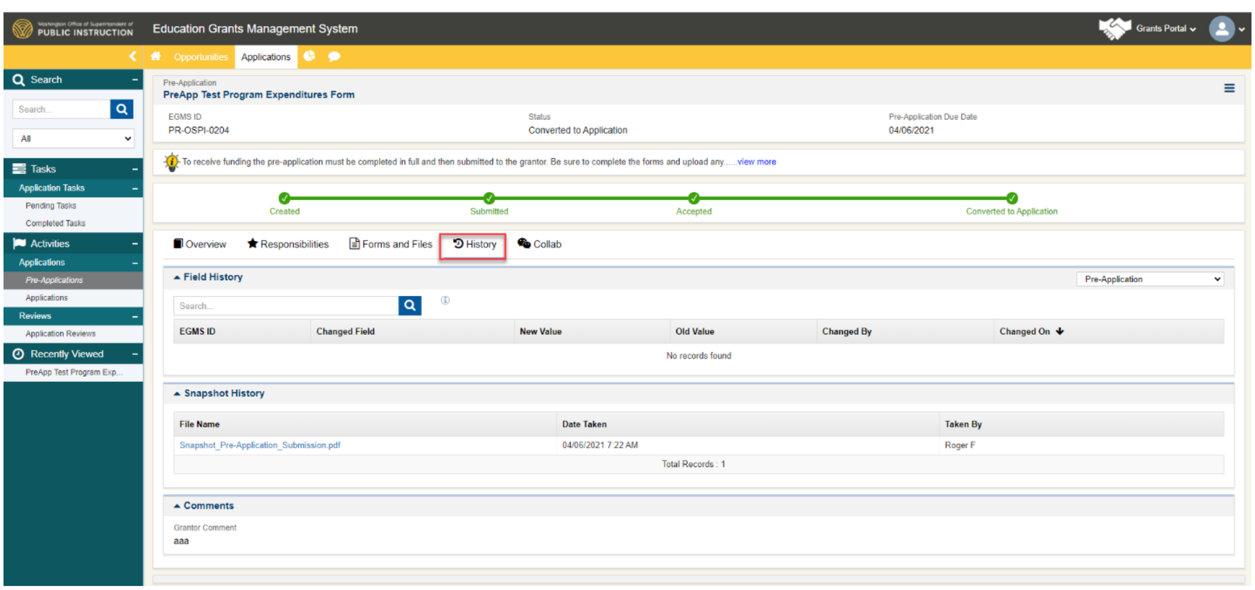


Figure 62: Snapshot History

9.1.5 COLLAB TAB

On the **Collab** tab, you can share feeds and send emails. To share feeds, add the required details in **My Feed** section and click on the **Share** button. Note that if you want the feed to be addressed to a specific registered user you can enter @ followed by the individuals name. The recipient of this feed will also receive an email letting them know they have been sent a My Feed chatter message.

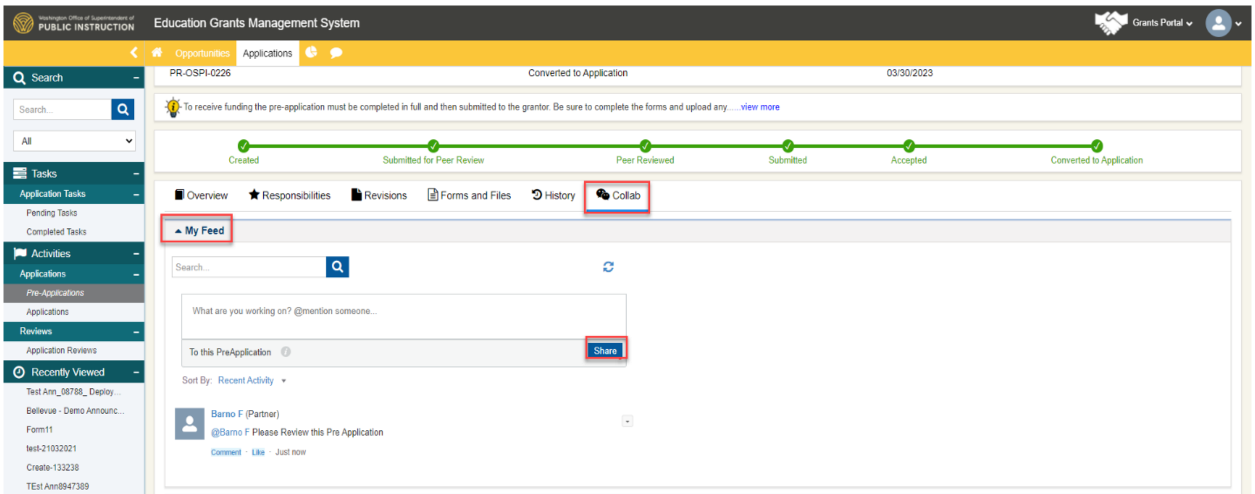


Figure 65: Share My Feed

To send the emails/message, navigate to **Messages** section. Click on **the Send Email** button to add the required details. Click **Send** button to send the message.

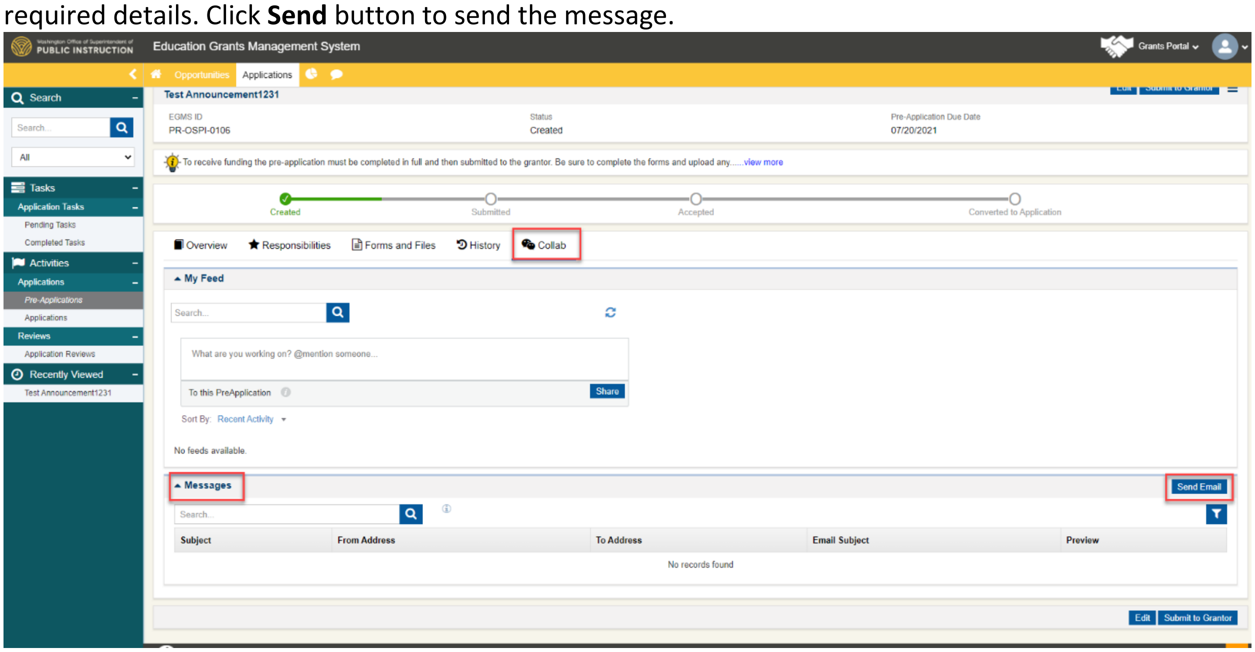


Figure 66: Send Email

Once you have entered or uploaded all required information throughout the different tabs and in the forms, click the **Submit to Grantor** button. If the submission is successful, the grantor will receive an email notification and a task generated to review the pre-application.

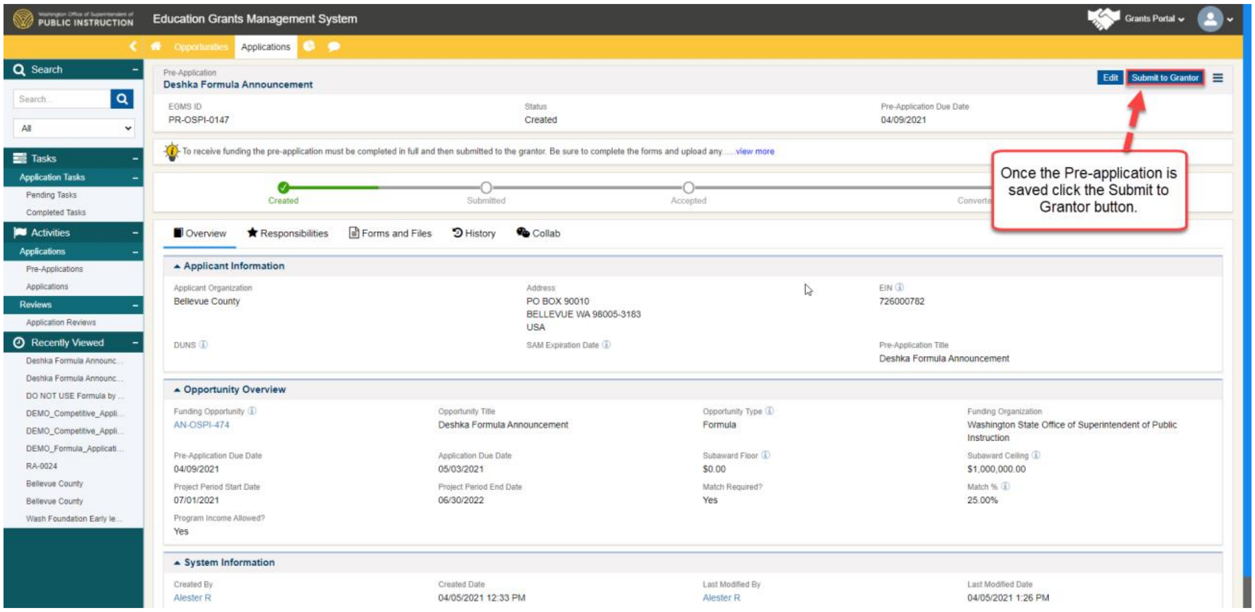


Figure 67: Submit Pre-Application to Grantor

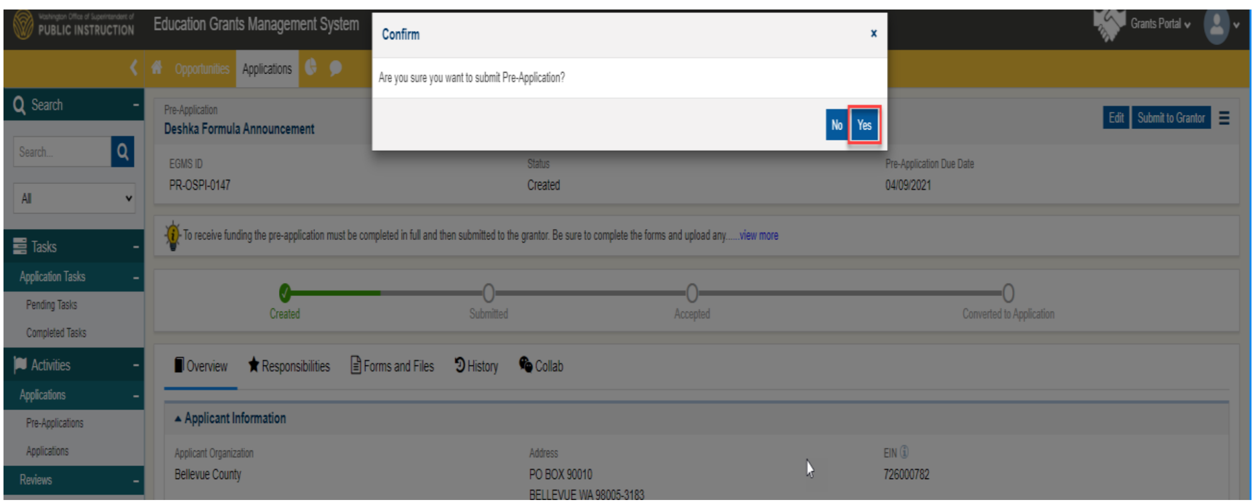


Figure 68: Submission Confirmation

9.1.6 PRE-APPLICATION REVISIONS

OSPI announcement owner can request a revision to be made on the Pre-Application. The Pre-Application record owner (user that submitted pre-application) will receive an email notification and a pending task to revise and re-submit the pre-application. To access the revision task, navigate to the **Applications** tab and select 'Pending Tasks' on left navigation menu. Find the *Revision Request* task under the 'Type' column and click on the green start action icon.

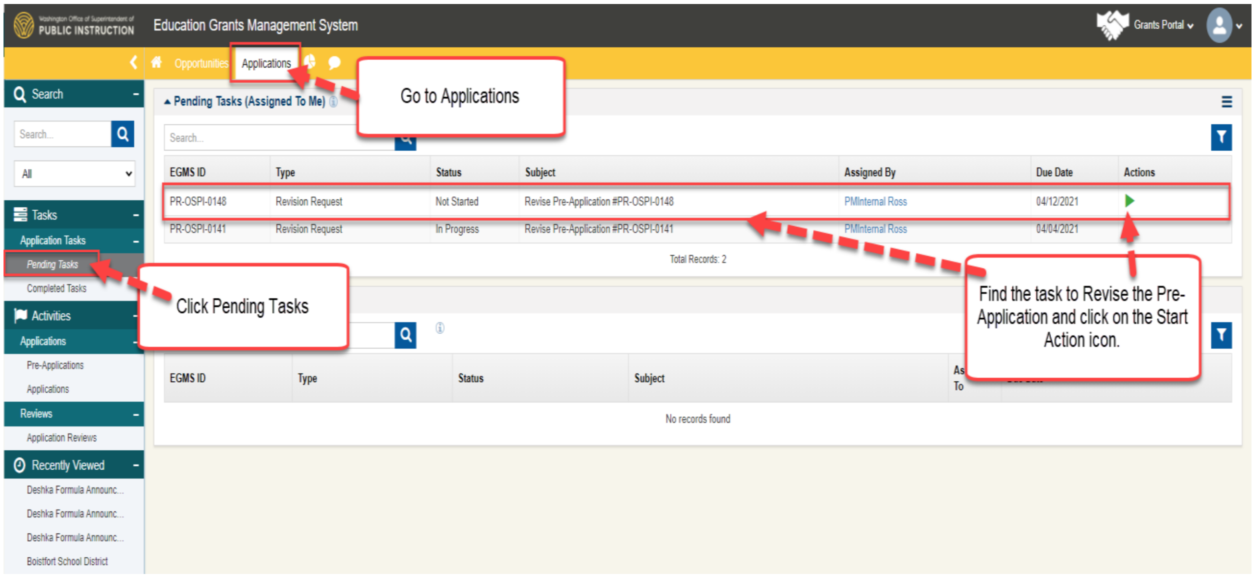


Figure 69: Pre-Application Revision

The system will take you to a Revisions tab where you can see the revision request details and enter your response. The revision request details will indicate what tabs or forms are open for you to edit. You will not be able to edit any tab or form details if it was not requested to be revised by the grantor.

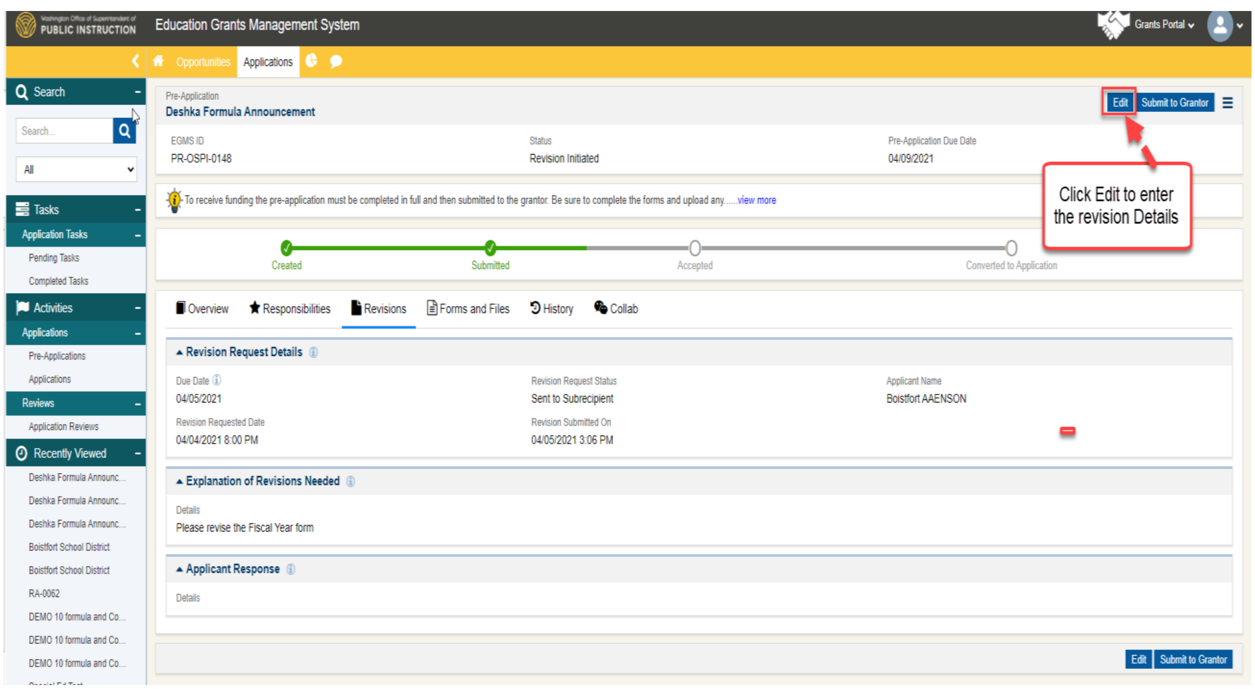


Figure 70: Edit revision Details

Revision details are required to be entered under Applicant Response section before you can re-submit the pre-application to the grantor.

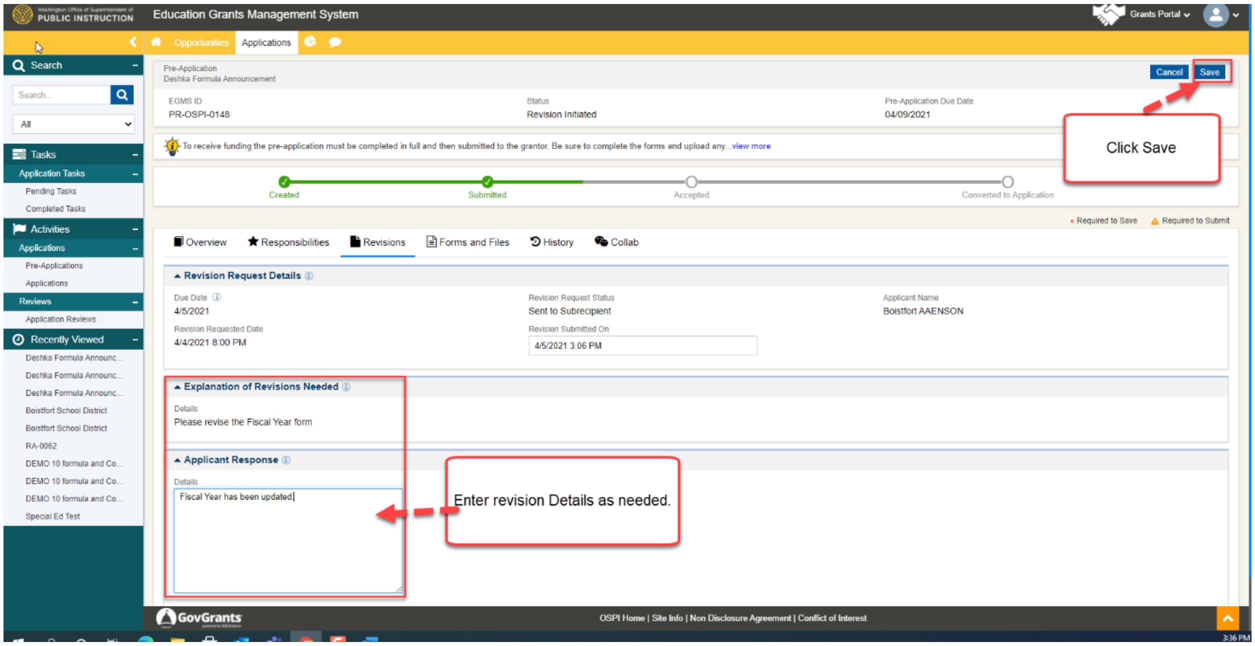


Figure 71: Save revision Details

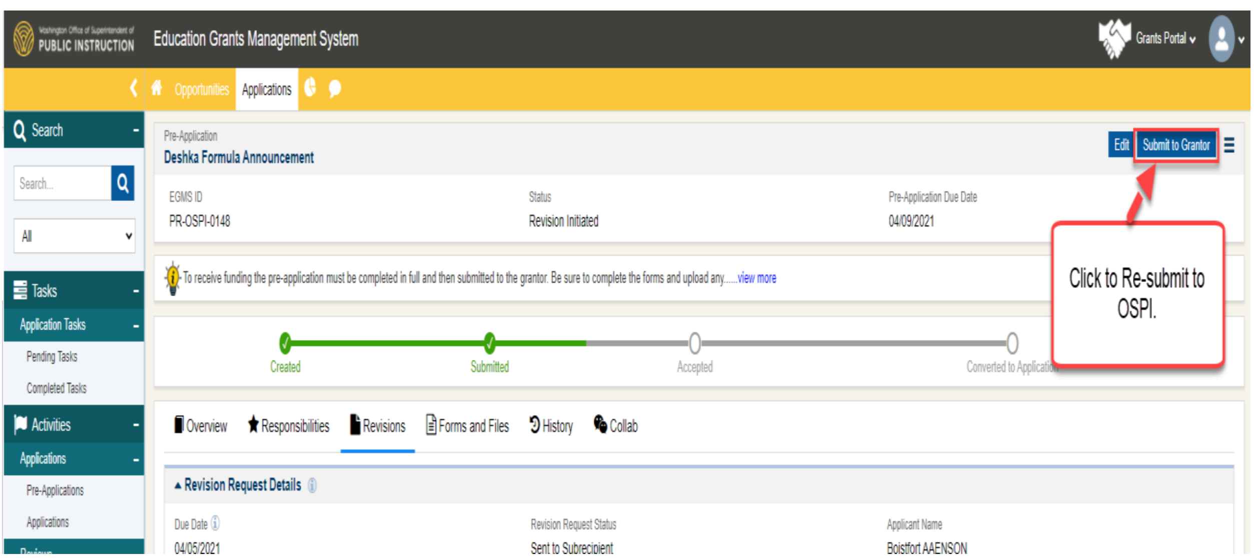


Figure 72: Submit to Grantor

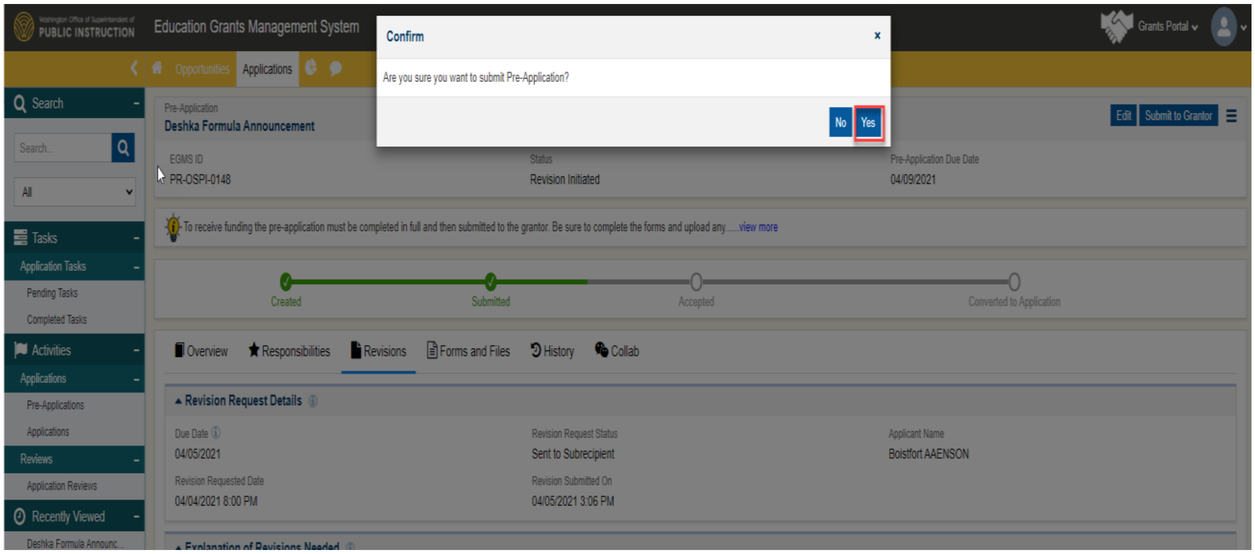


Figure 73: Submission Confirmation

DOWNLOADING PRE-APPLICATION INCLUDING ALL FORMS AS A PDF

From the Pre-Application record, click on the **Hamburger** (☰) icon.

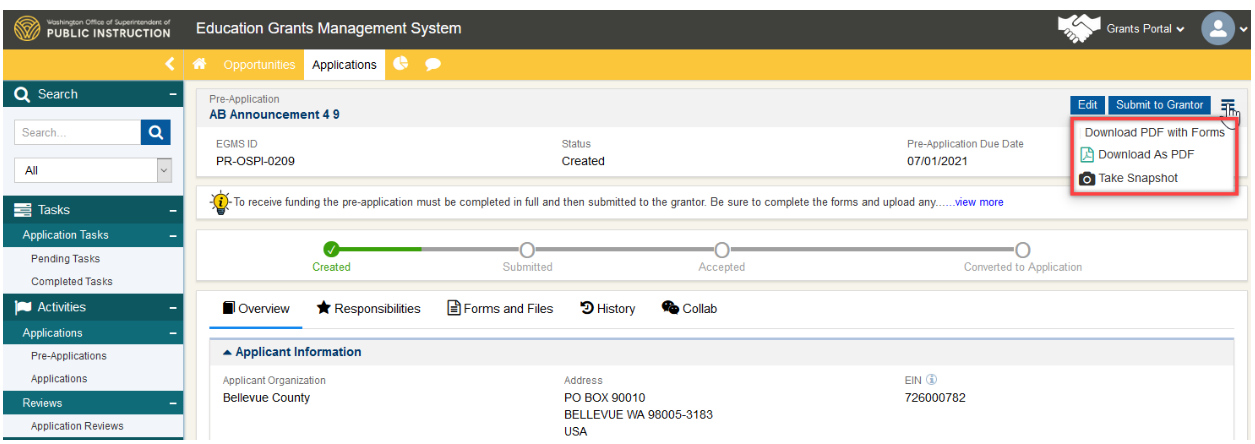


Figure 74: Download PDF with Forms

- **Note:** You will see a success message as follows: The PDF file you requested is being processed and will be available within few minutes in the "Forms and Files" tab, under the Pre-Application Files section.

Click on the **Forms and Files tab**. Scroll to the "Pre-Application Files" section to Download, View, edit, or Remove the PDF.

9.2 COMPLETING AN APPLICATION

9.2.1 CREATE APPLICATION FROM PRE-APPLICATION

After the pre-application has been accepted by the Grantor you will receive an email notification and a task to create the application. To access the task, navigate to the HOME tab and select Pending Task from the left navigation menu. Select the Green **Play** arrow that appears under the Actions column.

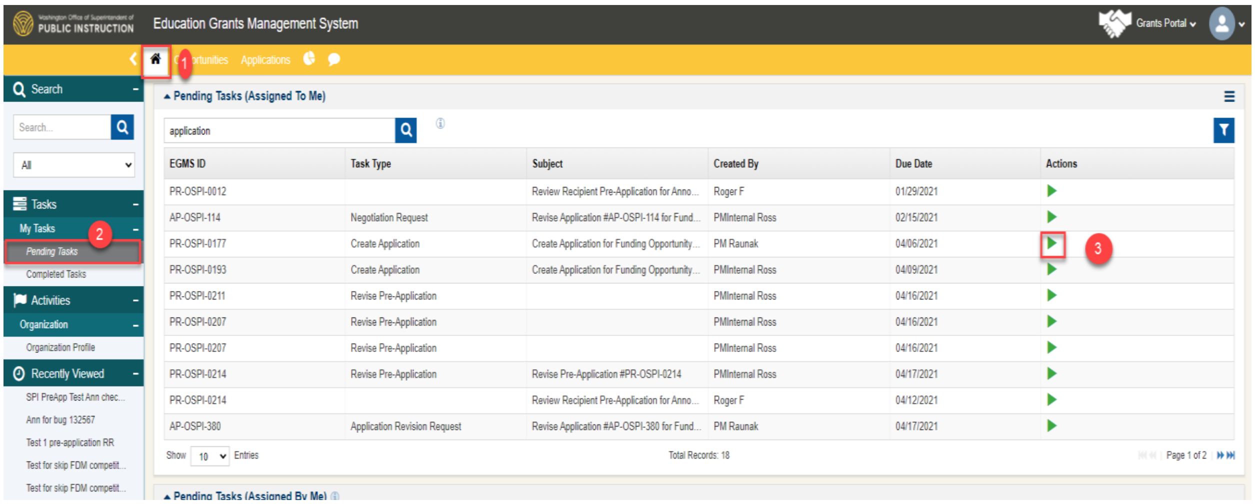


Figure 75: Task to create Application from Pre -Application

This task will take you to the accepted pre-application where a Create Application button will be available on top right of screen, click on the **Create Application**.

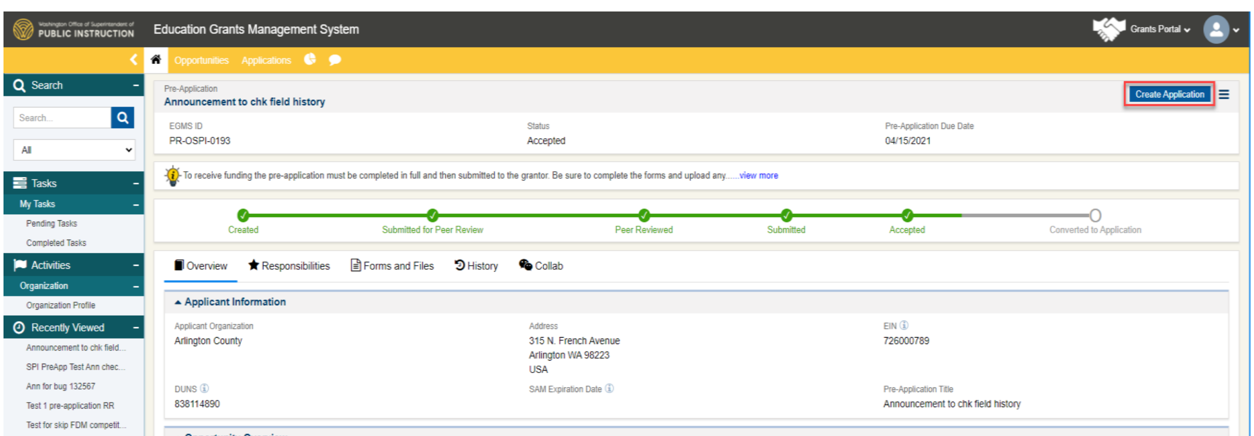


Figure 76: Converting Pre- application to Application

9.2.2 CREATE APPLICATION FROM OPPORTUNITY

Clicking on the **Available** Opportunities in the left navigation pane you will find a published announcement that you are interested in and then click on the View ( ) icon. You will be taken to the opportunity record and after carefully reviewing all details click on the **Qualify** to pursue the opportunity.

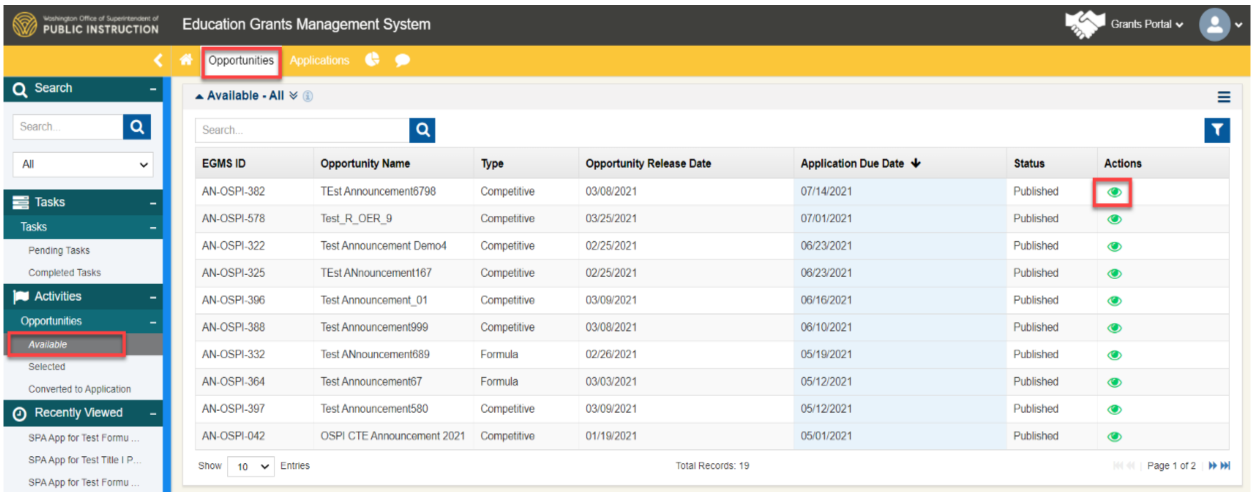


Figure 77: Select an Opportunity

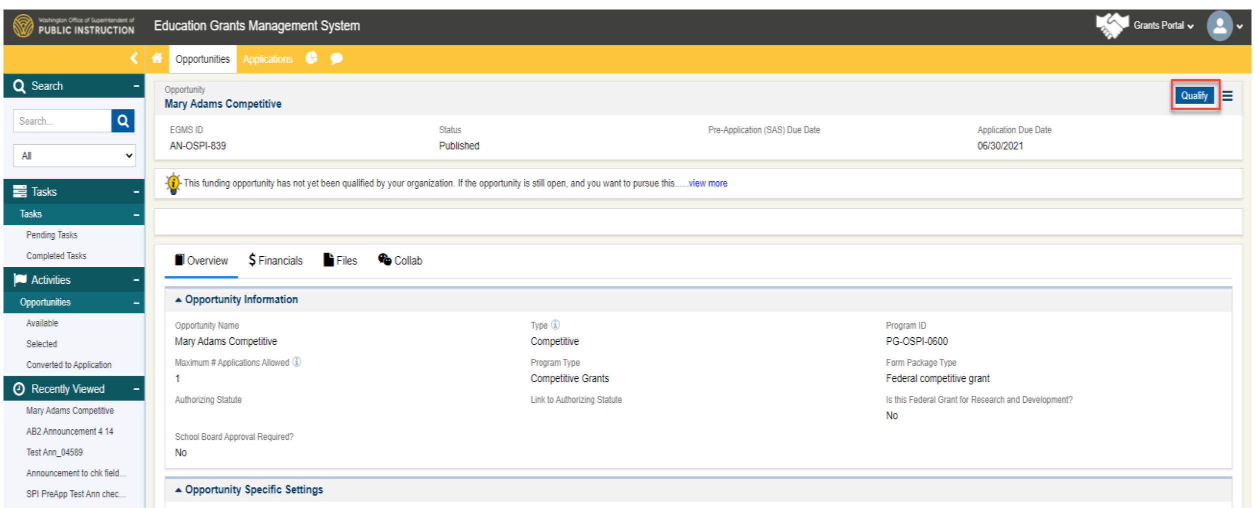


Figure 78: Qualify to pursue the opportunity

Note: If your organization does not meet the eligibility type the system will require you to confirm if you want to continue as seen in screenshot below.

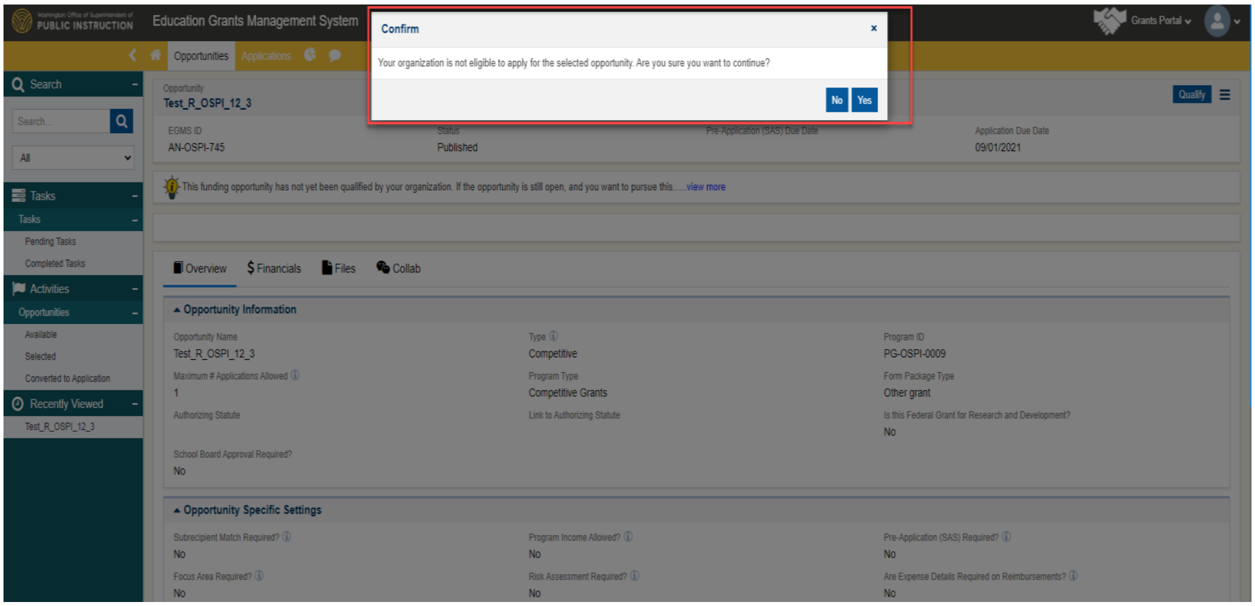


Figure 79: Confirm if you want to continue

From the Qualified (Selected) Opportunity record, you will see either a **Create Pre-Application** or a "**Create Application**" button, as applicable for the opportunity. Click **Create Application**.

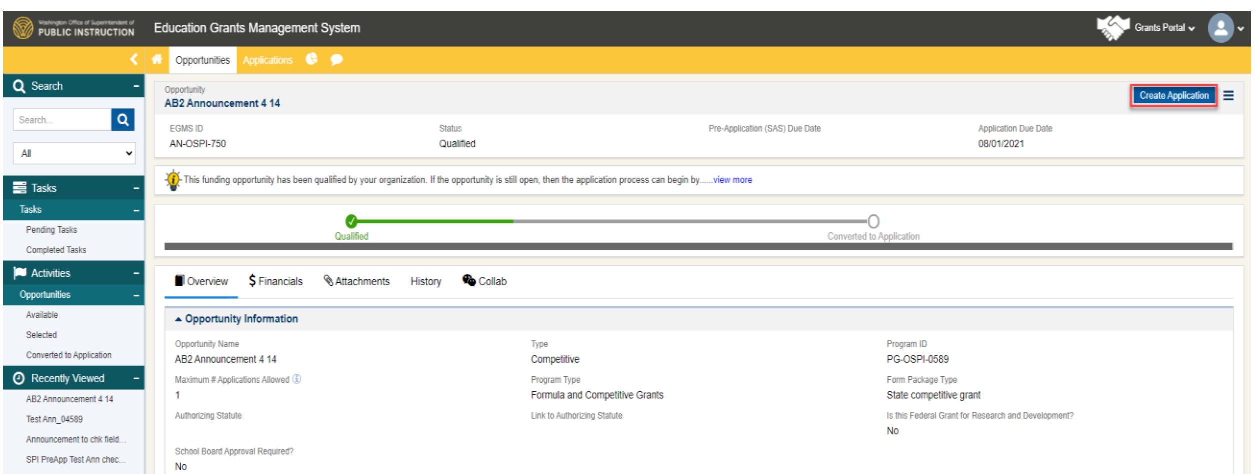


Figure 80: Create Application

After you have Click on the **Create Application** button you will be taken to the create application modal window. Click on the **Save and Continue** button.

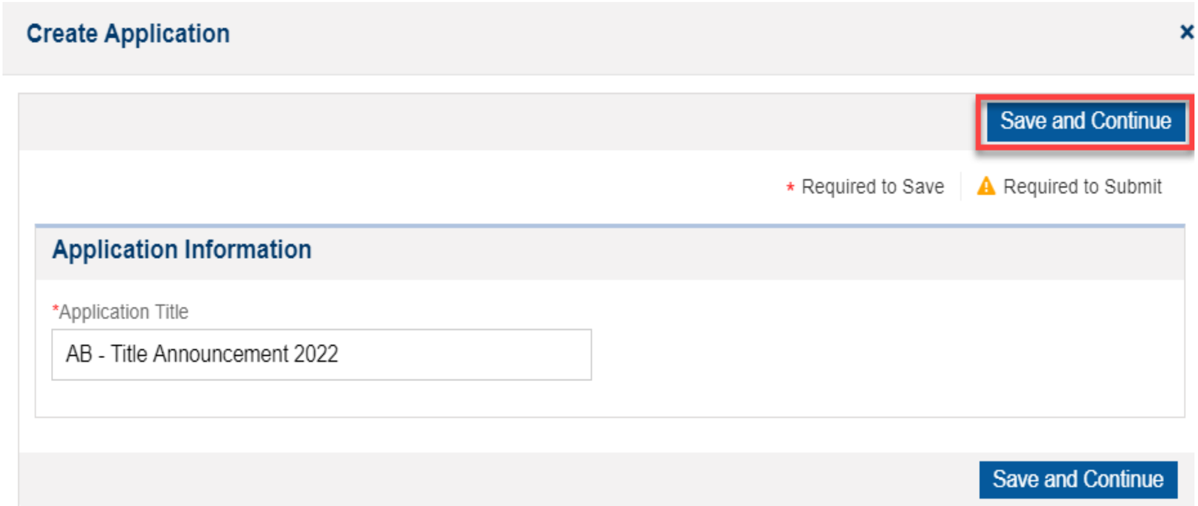


Figure 81: Application Information

Upon saving information in the Create Application modal, additional tabs are displayed. The application will be in edit mode.

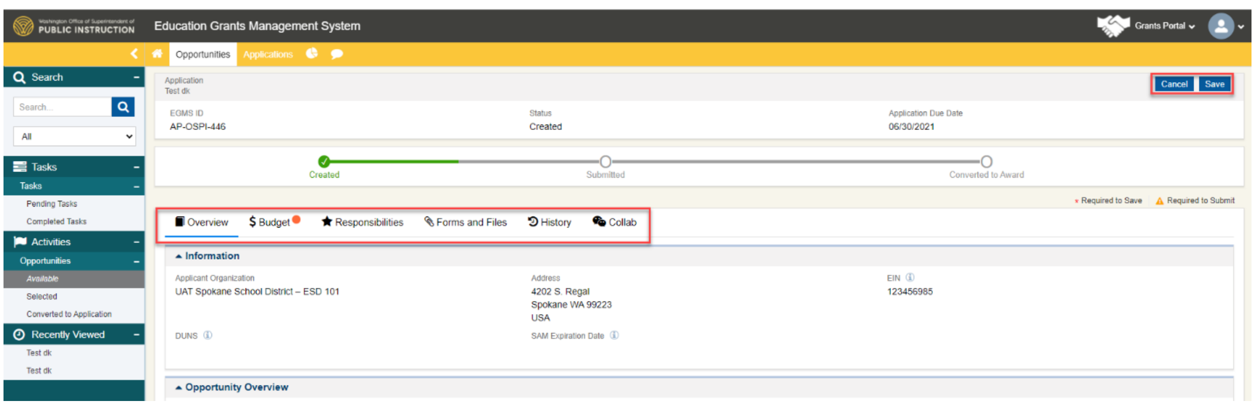


Figure 82: Application Tabs

On the **Overview** tab you can see Information, Opportunity Overview, and Application Overview. Enter the Budget requested and the estimated program income. To associate **Applicant Contacts** click on the Associate to add a contact.

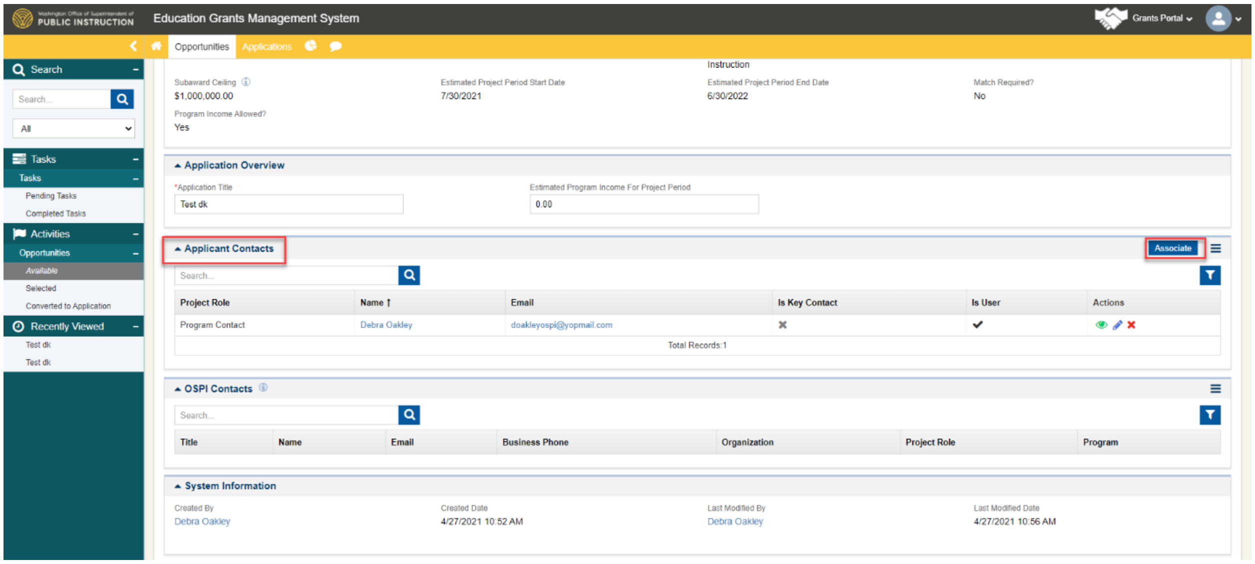


Figure 83: Applicant Contacts

To add a **Project Role**, click on the **Edit** ( ) icon. If you want to remove the contact, click on the Remove (X) icon.

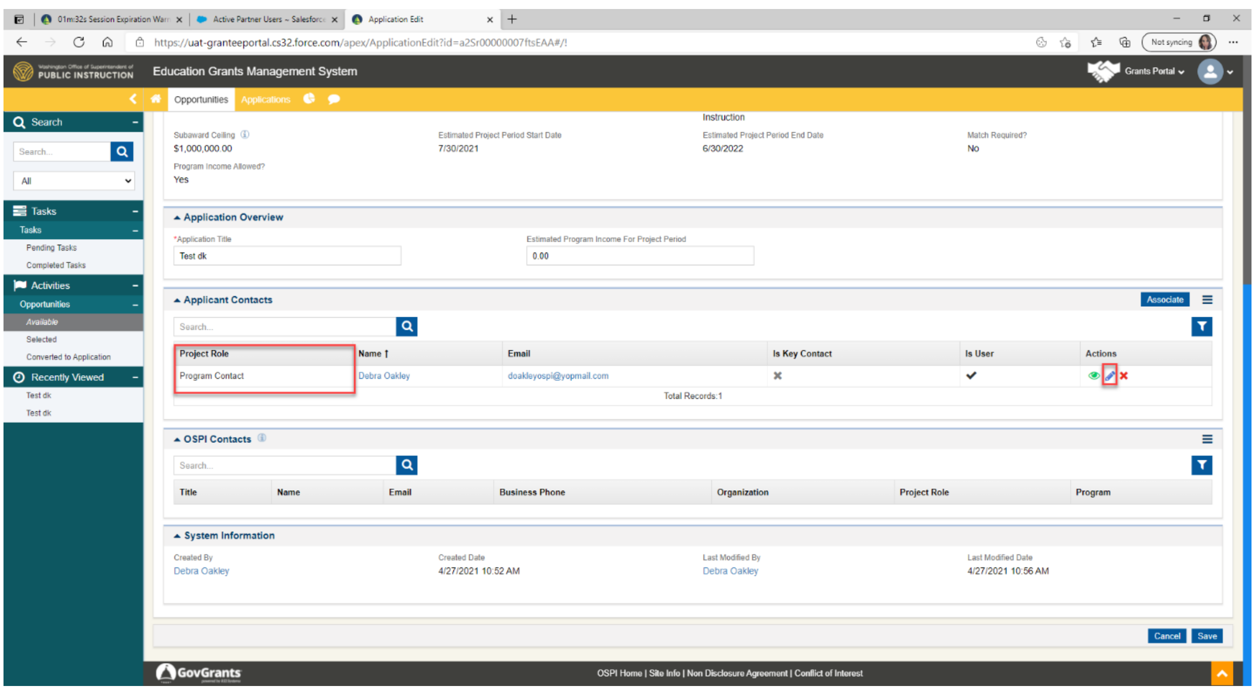


Figure 84: Adding a Project Role

Scroll down to the OSPI Contacts section to view any contacts related on the Funding Announcement. To view details, click on the **View** ( ) icon.

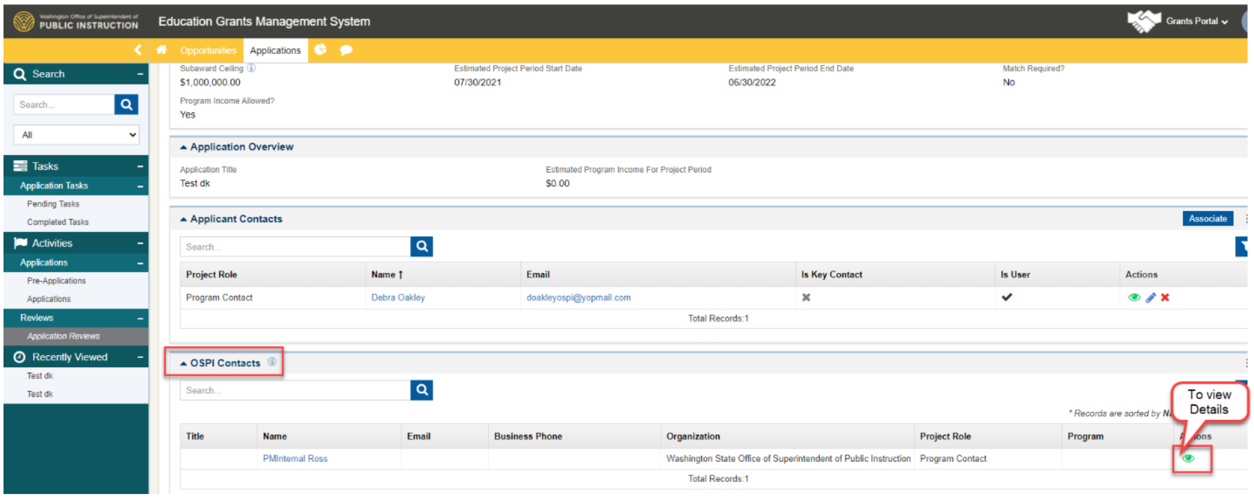


Figure 85: OSPI Contacts

Select the **Budget** tab and navigate to down to see the Budget Information section. This section contains the Allocation Amount, indirect rate fields, and calculated fields related to the application budget. Scroll down to the Allocations and Indirect Costs section. Click the **Edit** ( ) icon to enter the Requested Indirect Amount, and **Save**.

> Note: The Application's **Budget** tab is hidden for competitive announcements. Budgets are collected later during the awarding process. Complete this step for formula or directed announcements only.

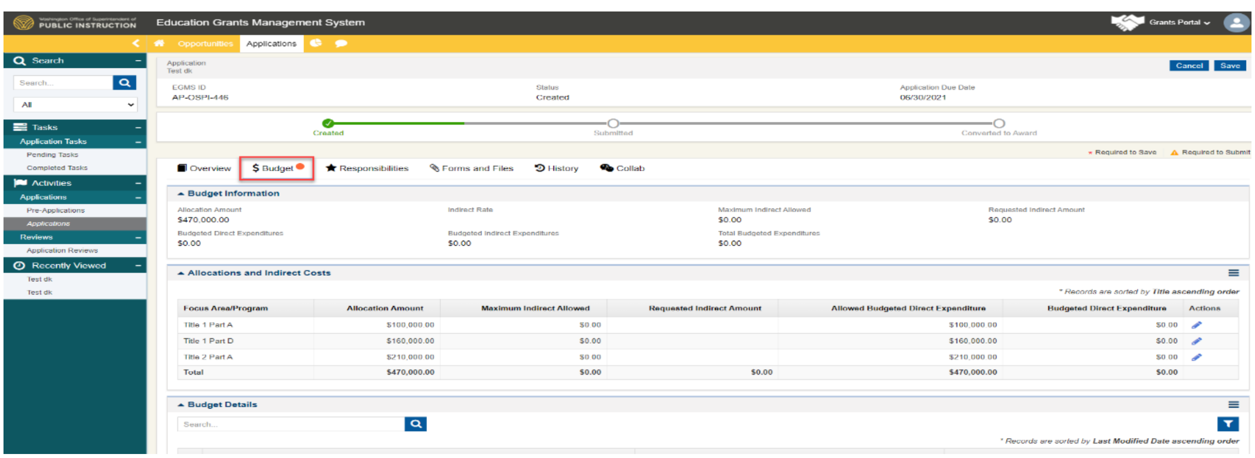


Figure 86: Budget Tab

Navigate to the Budget information section which contains the Allocation Amount, indirect rate fields, and calculated fields related to the application budget. Click on the **Edit** ( ) icon into the **Allocations and Indirect Cost** to enter the Requested Indirect Amount, and then click **Save.**

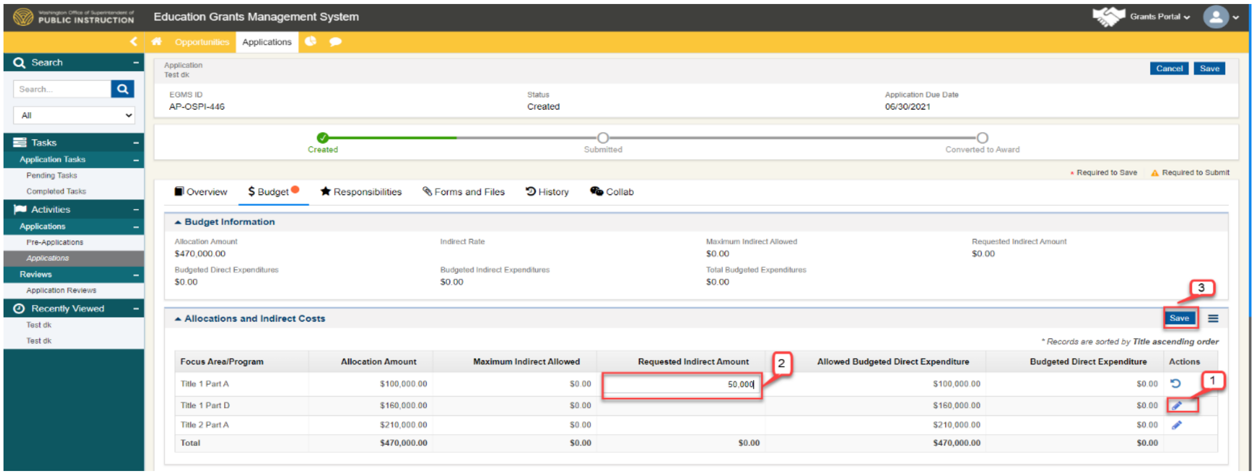


Figure 87: Allocations and Indirect Costs

Notes:

- When Indirect Costs are "Not Allowed" per the funding announcement, the user will be stopped from entering a requested indirect amount.
- When Indirect Costs are "Unrestricted", "Restricted", or "State", the Maximum Indirect Amount will also be calculated. Users can request Indirect Costs up to the Maximum Indirect Amount.
- If the Indirect Rate Type for the related funding announcement is Unrestricted, Restricted or State, and if Maximum Indirect Rate is also provided in the announcement, then the application uses the indirect rate that is lower between the Maximum Indirect Rate and Indirect Rate (Unrestricted or Restricted or State) set for the fiscal year for the external organization.
- If the Indirect Rate Type for an announcement is either Unrestricted or Restricted or State, and if Maximum Indirect Rate is not provided in the announcement, then in the application use the indirect rate (Unrestricted or Restricted or State) set for the fiscal year for the external organization.
- If the indirect rate (Unrestricted or Restricted or State) is not set for the fiscal year for the external organization, then I cannot create the application and I see a validation message.

On the **Budget Details** section click the "+" icon to expand the template. To enter values for any budget category, click on the **Edit** ( ) icon.

- For General Fund detailed budgets, a modal window opens to enter line-item budget details. Use the "Edit" ( ) icon to add values. Click on "**Add Rows**" as needed.
- For Capital non-detailed budgets, users enter single lines per budget category.
- If budgeting is by Subcategory, you will see a button to view "**Budget Summary by Subcategory**". After clicking, the user is navigated to a report (Application Budget Summary by

Sub-Category). Click on "Run Report". It shows budget data summarized by subcategories for the application.

- If budgeting is by School, you will see a button to view "**Budget Summary by School**". After clicking, the user is navigated to a report (Application Budget Summary by School). Click on "Run Report". It shows budget data summarized by subcategories for the application.

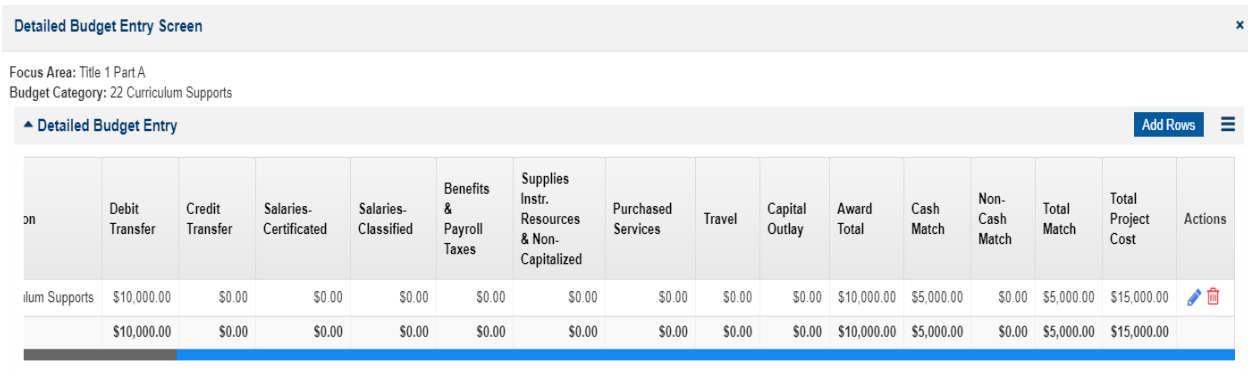


Figure 88: Detailed Budget Entry

As an application record owner and peer reviewer with **Edit** access, you can upload an Excel file with the Budget. Click on the "" **Download in Excel**" to download the budget template. The records entered in the Budget details are shown in the downloaded sheet. Also, the Excel sheet shows only the columns shown in the Budget Detail section with the School Name and School Name.

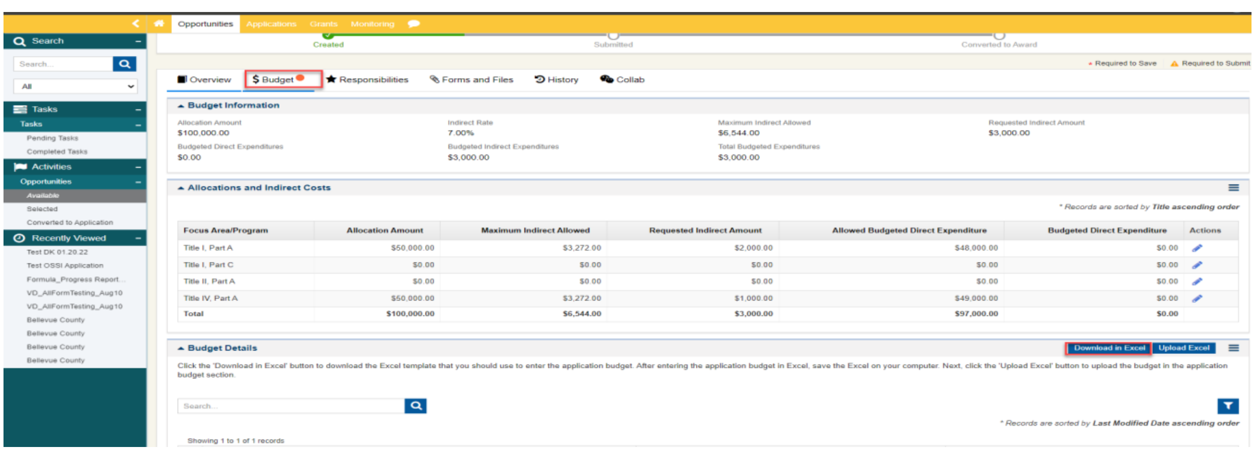
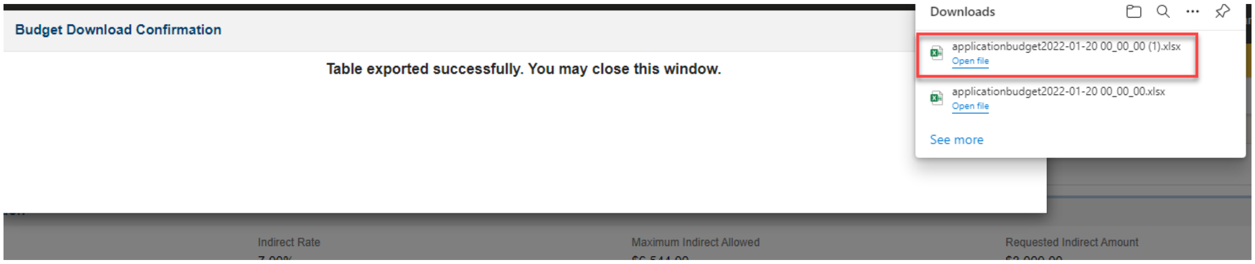
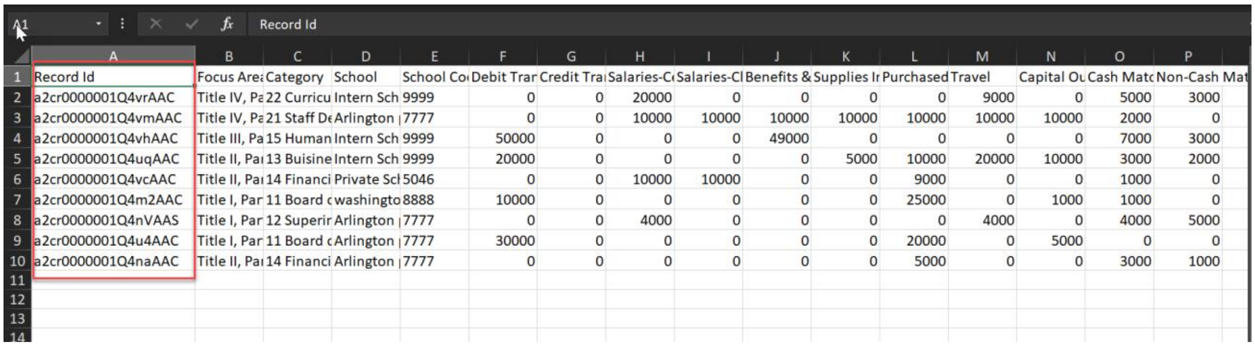


Figure 89: Download in Excel



Open the file



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Record Id	Focus Area	Category	School	School Co	Debit Trar	Credit Tra	Salaries-C	Salaries-Cl	Benefits &	Supplies Ir	Purchased	Travel	Capital Ou	Cash Matc	Non-Cash Mat
2	a2cr0000001Q4vrAAC	Title IV, Pa	22 Curricu	Intern Sch	9999	0	0	20000	0	0	0	0	9000	0	5000	3000
3	a2cr0000001Q4vmAAC	Title IV, Pa	21 Staff De	Arlington	7777	0	0	10000	10000	10000	10000	10000	10000	10000	2000	0
4	a2cr0000001Q4vhAAC	Title III, Pa	15 Human	Intern Sch	9999	50000	0	0	0	49000	0	0	0	0	7000	3000
5	a2cr0000001Q4uqAAC	Title II, Pa	13 Buisine	Intern Sch	9999	20000	0	0	0	0	5000	10000	20000	10000	3000	2000
6	a2cr0000001Q4vcAAC	Title II, Pa	14 Financi	Private Sc	5046	0	0	10000	10000	0	0	9000	0	0	1000	0
7	a2cr0000001Q4m2AAC	Title I, Par	11 Board c	washingto	8888	10000	0	0	0	0	0	25000	0	1000	1000	0
8	a2cr0000001Q4nVAAS	Title I, Par	12 Superir	Arlington	7777	0	0	4000	0	0	0	0	4000	0	4000	5000
9	a2cr0000001Q4u4AAC	Title I, Par	11 Board c	Arlington	7777	30000	0	0	0	0	0	20000	0	5000	0	0
10	a2cr0000001Q4naAAC	Title II, Pa	14 Financi	Arlington	7777	0	0	0	0	0	0	5000	0	0	3000	1000

NOTE: For detailed budget 'By Subcategory' or 'By School', do not enter any value or make any changes to the existing value in the 'Reference ID' column in the downloaded excel.

Notes:

- You cannot upload an Excel with more than one row with the same combination of Focus Area and Budget Category more than once for General Budget with Detailed Budget as 'N/A' or for Capital Budget.
- You cannot upload an Excel with more than one row of Focus Area/Budget Category/School Code combination multiple times.
- You can only edit the budget with Excel Uploads but not delete.

Click on **Upload Excel** to upload the Application budget.

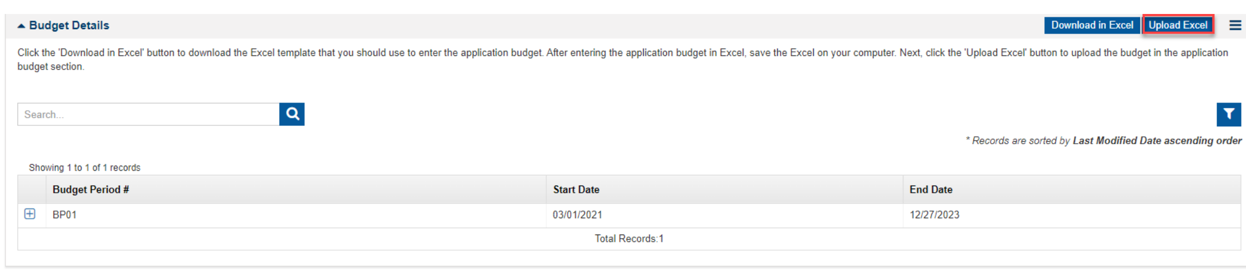
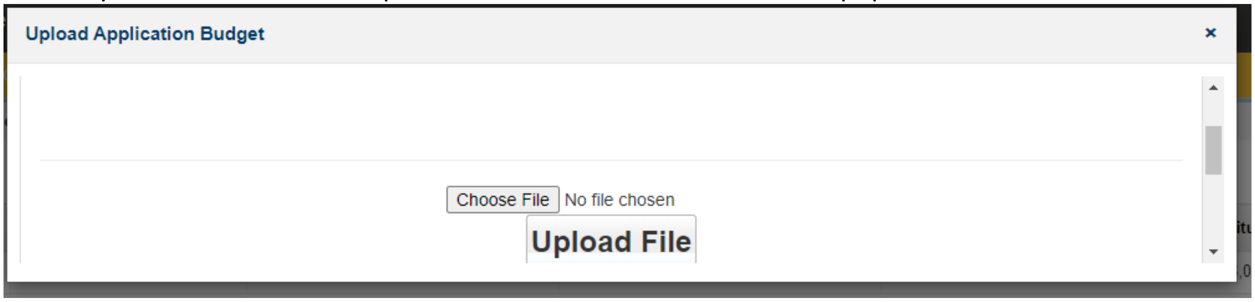


Figure 90: Upload Excel

Choose your File and click the Upload button. The Excel details will be populated in the section



Type the justification for project budget cost under the **Budget Narrative** section.

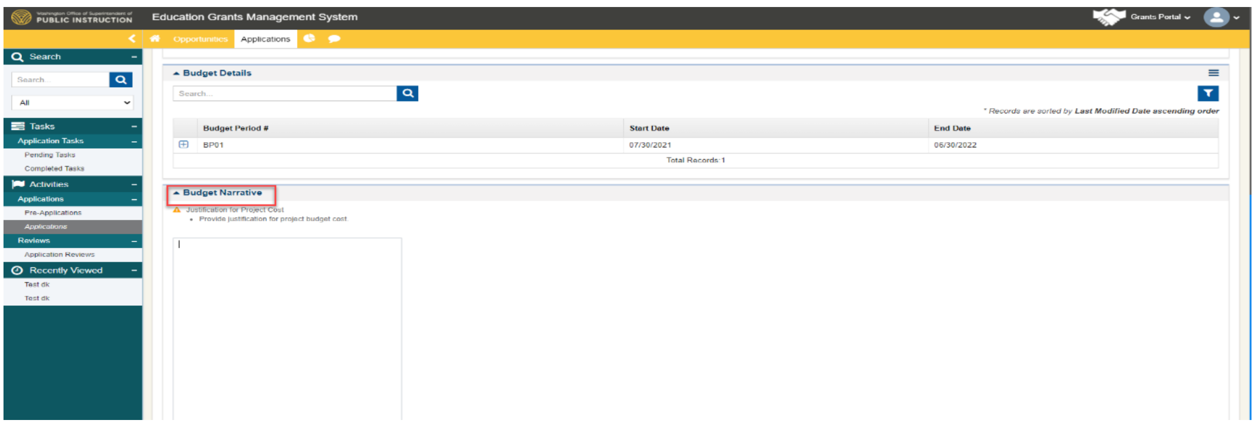


Figure 91: Add Budget Narrative

Navigate to the **Forms and Files** tab, in the Application Files section select **Add Files**.

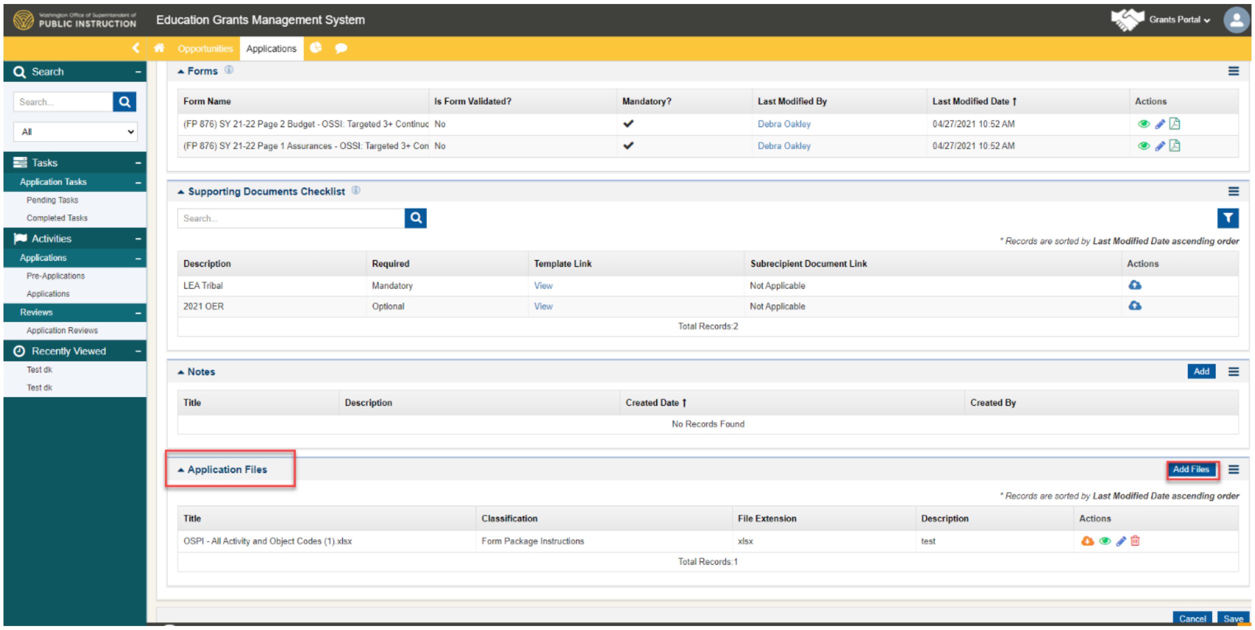


Figure 92: Application Files

You can choose to **Upload File from your computer** or **Upload from a Library**. After you choose the File to be uploaded add a Description and click **Upload.**

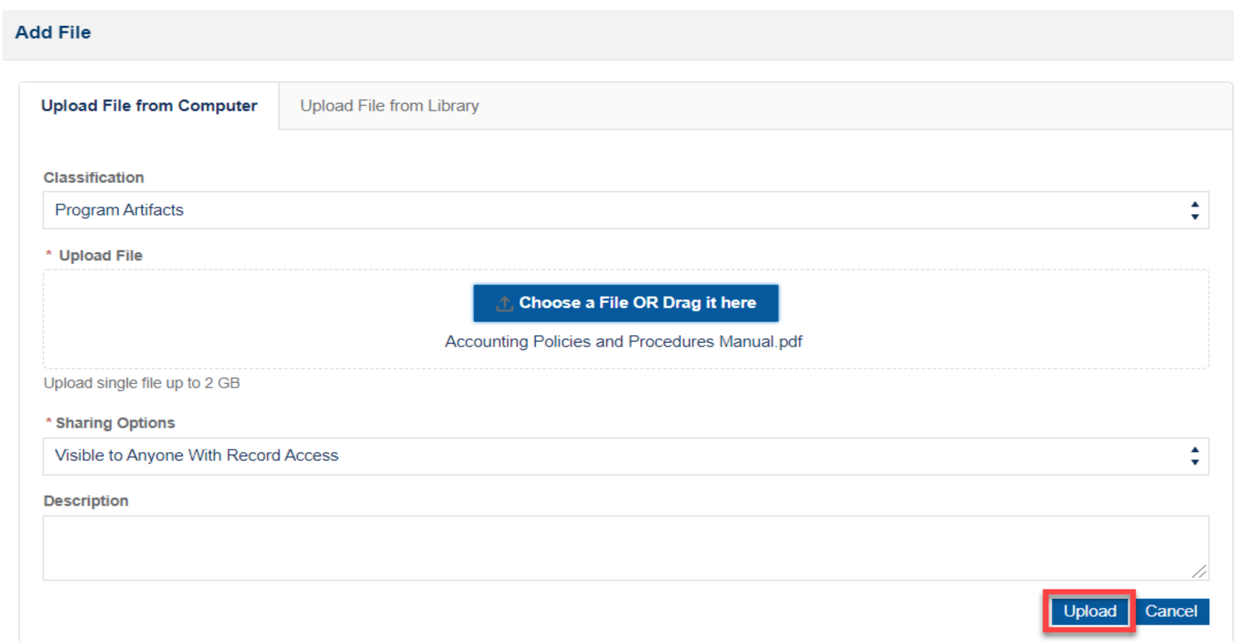


Figure 93: Uploading File

On the **Forms and Files tab** complete the SAS and Program Assurances form and Transferability/REAP Options forms. Click on the **Edit** ( ) icon so you can complete the form.

Note: The data entered in "Intent to Participate and Transferability/REAP Options" form on the Pre-Application record is copied over to the "Transferability and REAP Confirmation" form.

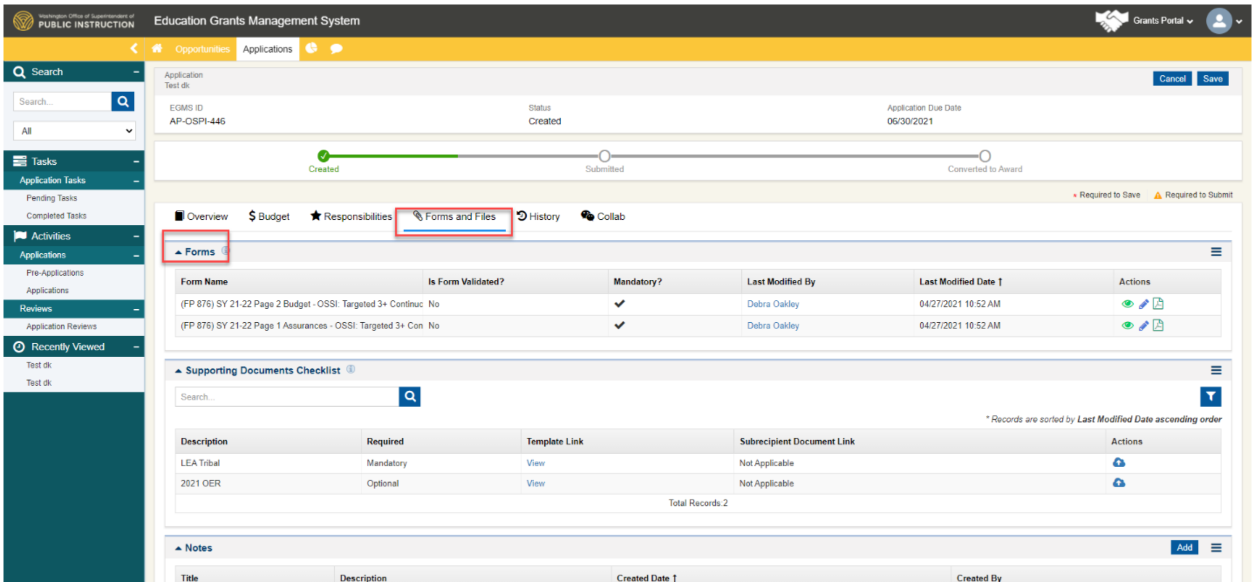


Figure 94: Forms

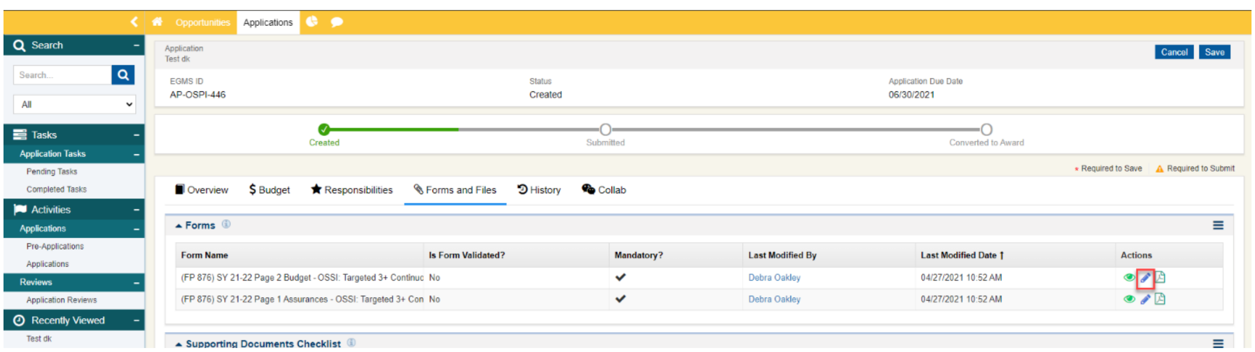


Figure 95: Edit the require forms

If all the required data is entered in the form, the form will be successfully validated. This does not submit the form to the grantor, it only validates that the data was entered correctly. From the Application Form Click on the **Validate** in the top right corner. The system will check that all required data has been entered on the form. If any data is missing, you will see a red error message.

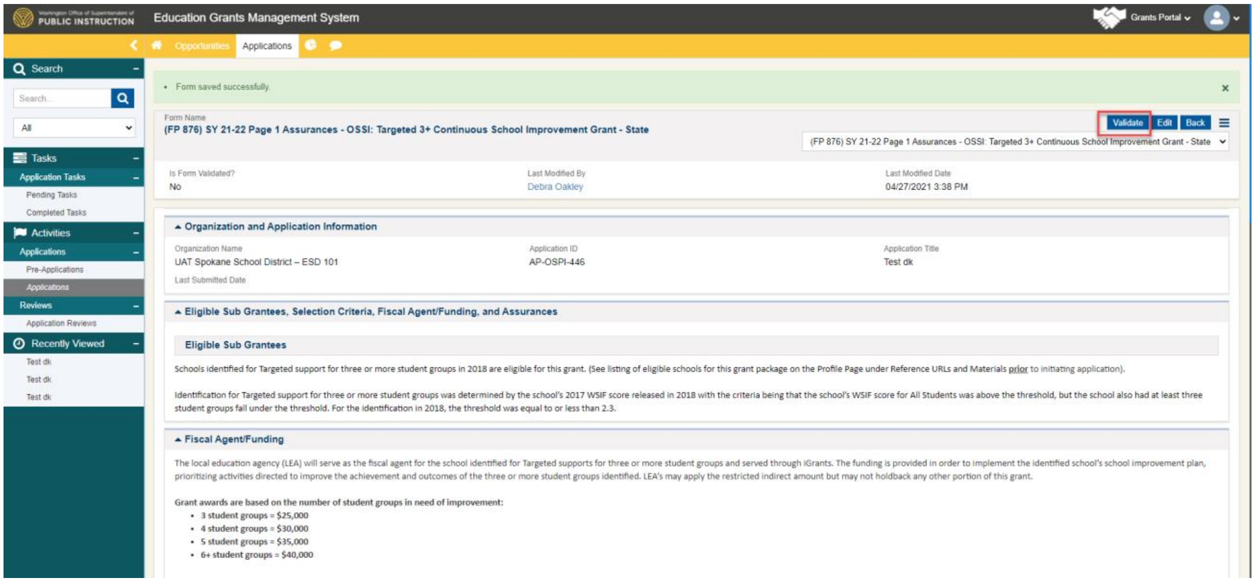


Figure 96: Validating forms

Is the form is validated? field will be changed from **No** to **Yes** when the form is successfully validated.

Is form validated? field will be changed from **Yes** to **No** if the user makes any changes on the validated form.

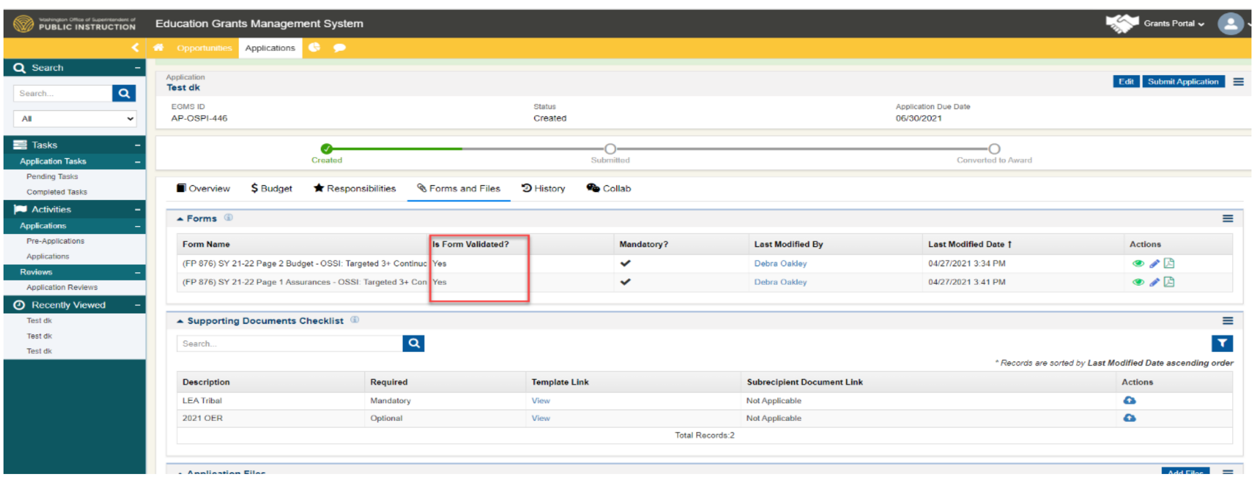


Figure 97: Is Form Validate

On the **Collab** tab, recipient user can share his feeds and send emails. To share the feeds, add the required details in **My Feed** section and click on **the Share** button.

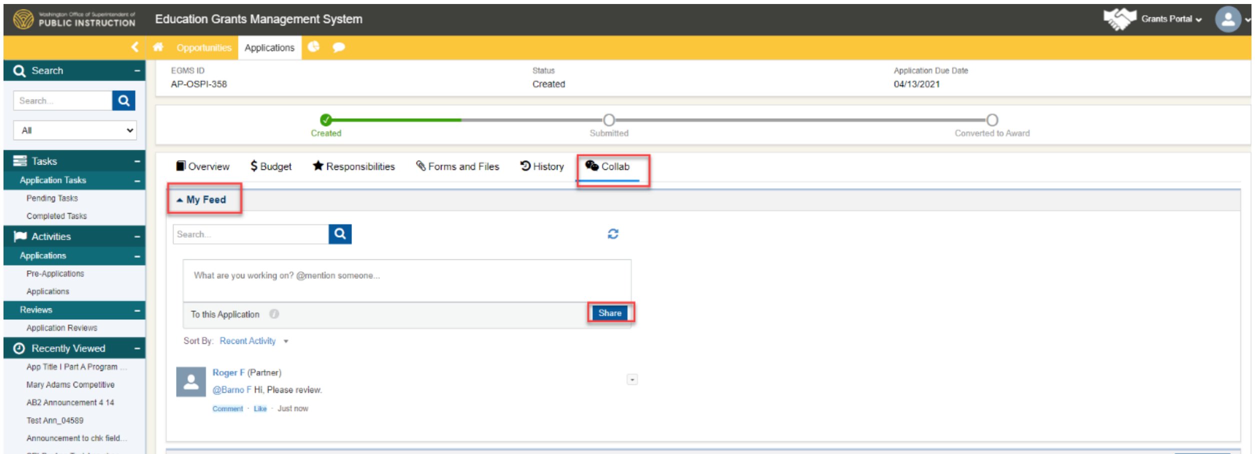


Figure 98: Share My Feed

To send the emails/message, navigate to **Messages** section. Click on the **Send Email** button to add the required details. Click **Send** button to send the message.

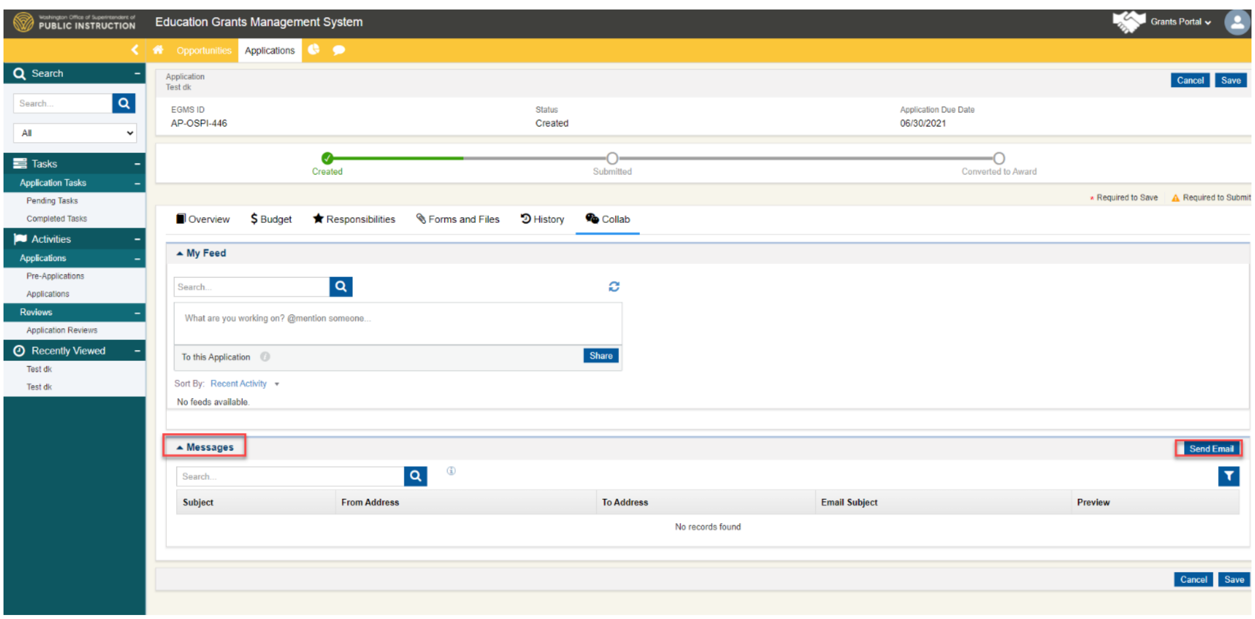


Figure 99: Send Email

After you have entered the required information and any additional information on hand, click on the **Submit Application** button. The application will now be submitted to the agency for review.

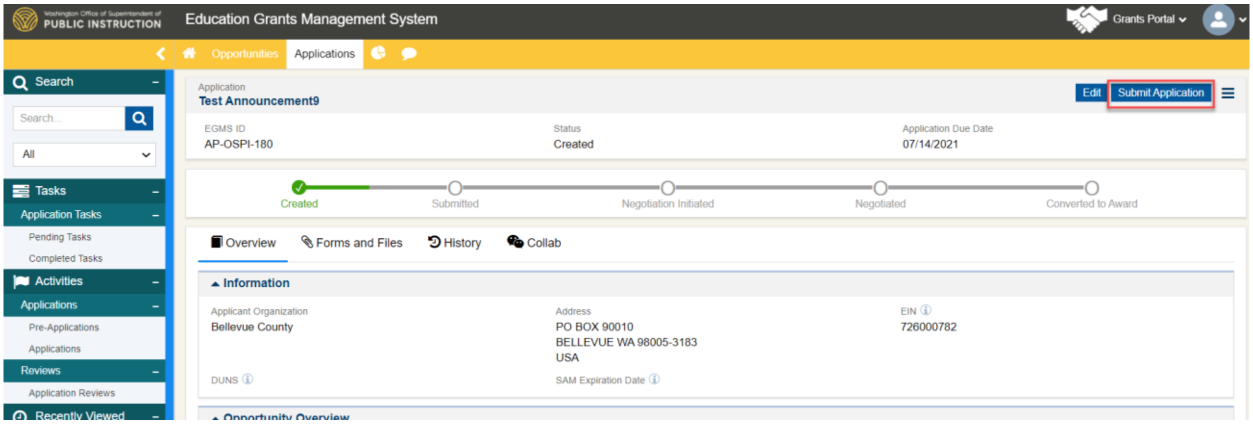


Figure 100: Submit Application

Navigate to the **History** tab. Once the application is submitted, the snapshot will be attached here.

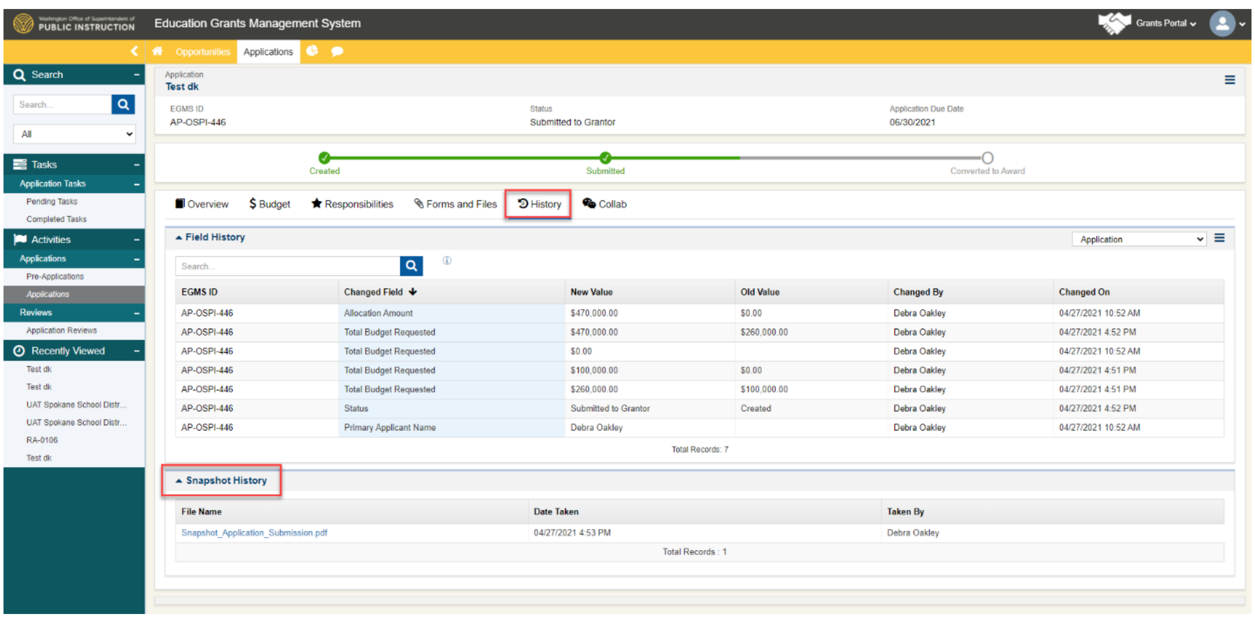


Figure 101: Snapshot History

9.2.3 COMPLETE APPLICATION REVISIONS

If there was an issue discovered in the application the Grantor can initiate a Revision. Navigate to your **Pending Tasks**. Locate the task to **Revise Application**. Click the **Action** icon (▶) to navigate to the Application.

Note: The applicant organization will only be able to revise sections of the application or forms related to the application which the internal OSPI staff has included as editable in the revision.

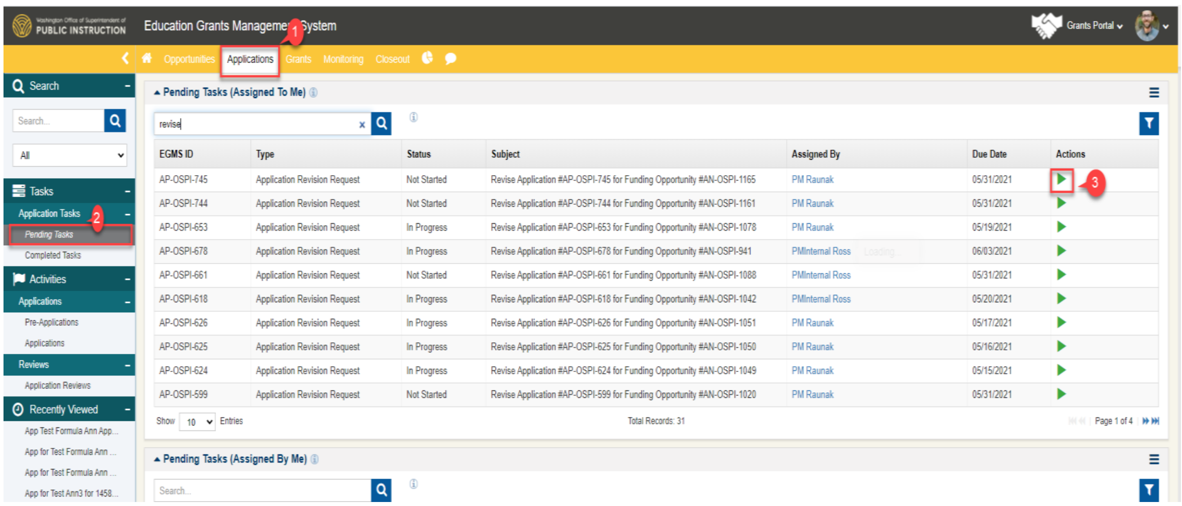


Figure 102: Application Revision

Edit any and all sections that are indicated in the Revisions tab. Once all revisions are completed, click on **Save**. Click on **Submit to Grantor**.

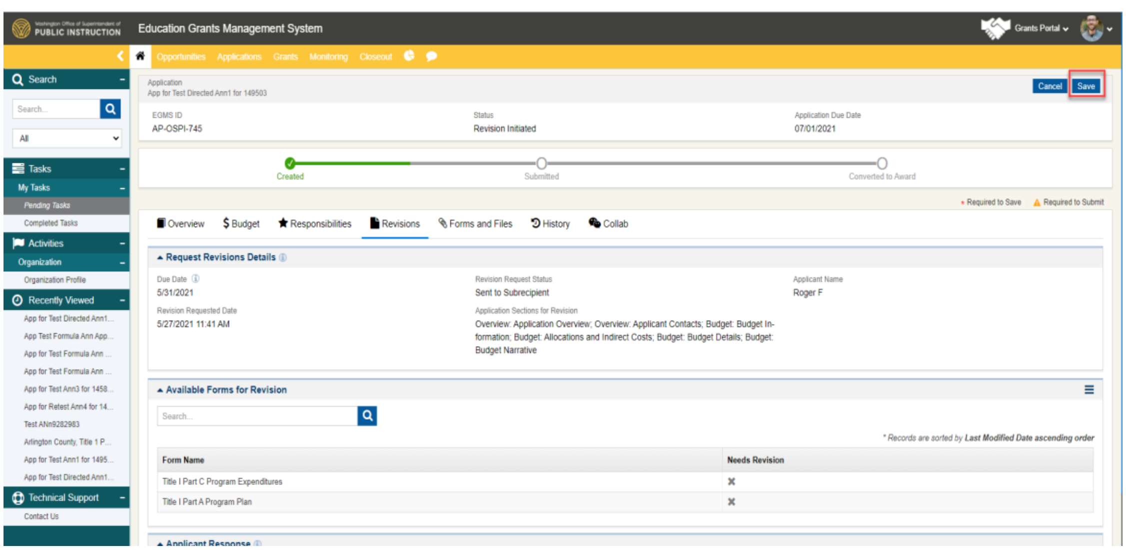


Figure 103: Save Revision

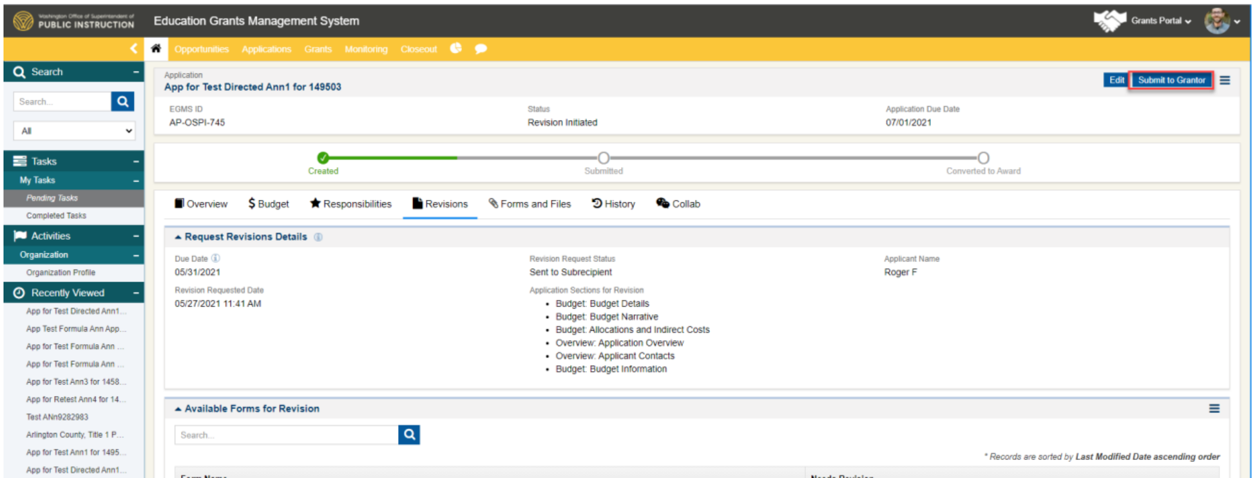


Figure 104: Submit Revision to Grantor

10 GRANTS

Grant is a financial assistance mechanism providing money, property, or both to an eligible entity to carry out an approved project or activity. The subaward includes grants and other agreements in the form of money or property in lieu of money, to an eligible recipient. In EGMS, Grant acts as a wrapper of one/many subawards.

10.1 VIEWING GRANTS AND AWARDS

Login to the EGMS Grants portal. Click on the **Grants** module and click the **Grants** link under **Grants, Subawards & Amendments** in the left-hand navigation menu to view Active, Pending, Closed, Rejected and All.

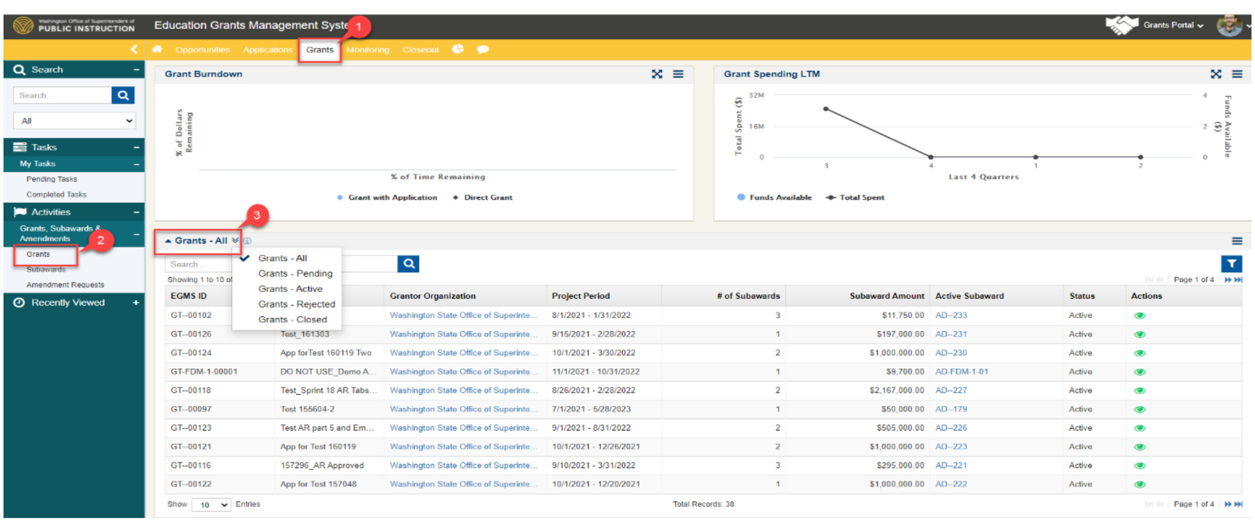


Figure 105: View Grants

10.2 AMENDMENT REQUESTS

Amendment requests are changes made to an active award which may be of a monetary or non-monetary type.

10.2.1 TYPES OF AMENDMENT REQUEST

The Amendments Module enables internal OSPI users and LEA users to create and process a range of grant amendment types. These can be amendments initiated by the Grantor (OSPI) or initiated by the LEAs. For either type, details of the change are specified, and the record is internally approved. Once approved, a new award can be generated in the system reflecting the changes.

The types of amendment requests that a Recipient will encounter are:

- **Funding Change** allows the Grantor to request an addition/reduction of funds for a budget line item.
- **Budget Period Change** allows the Grantor to request an extension or reduction to the budget period end date.
- **Scope of Work Change** allows the District/Grantor to make changes to the scope of the project.
- **Periodic Renewal** will enable the Grantor to create the award for the subsequent Budget Period within an Award.
- **Budget Redirections** allows the District to redirect funds from one Budget Category to another Budget Category
- **Carry Overs** allows the Recipient to carry forward funds from the current Budget Period to the next for grants that have multiple Budget Periods.

A. Possible Amendment Types Of combinations are listed below:

	Funding Change	Carry Overs	Scope Change	Budget Rev.	BP Change	Periodic Renewal
Funding Change	Allowed	Allowed	Allowed	Not Allowed	Allowed	Not Allowed
Carry Overs	Allowed	Allowed	**Allowed**	Not Allowed	Not Allowed	Allowed
Scope Change	Allowed	**Allowed**	Allowed	Allowed	Allowed	Not Allowed
Budget Revisions	Not Allowed	Not Allowed	Allowed	Allowed	Not Allowed	Not Allowed
BP Change	Allowed	Not Allowed	Allowed	Not Allowed	Allowed	Not Allowed
Periodic Renewal	Not Allowed	Allowed	Not Allowed	Not Allowed	Not Allowed	Allowed

B. Amendment Requests that can initiated by OSPI and/or LEA are listed below:

Amendment Type	Can OSPI Initiate?	Can District/LEA Initiate?
Funding Change	Yes	No
Carry Overs	Yes	No
Scope of Work Change	Yes (Rare)	Yes
Budget Revisions or Redirections (with or without transferability/REAP)	No	Yes
Performance Period Change	Yes	No
Periodic Renewal	Yes	No

10.3 INITIATING AN AMENDMENT REQUEST

Login to the EGMS Grants portal. Click on the **Grants** module and click the **Grants** link under **Grants, Subawards & Amendments** in the left-hand navigation menu. On the Grants page, select the Active Grants option to view the **Grants-Active** table. Locate the Award and click on the **View** ( ) icon under **Actions**.

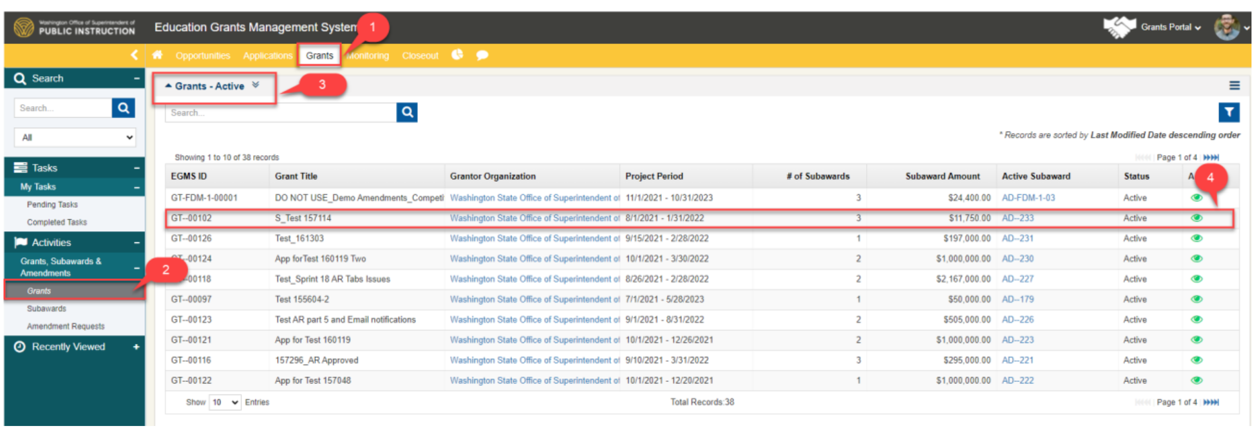


Figure 106: Accessing Active Grants

On the Grant page, navigate to the **Subawards** tab to view active subaward then click on the **View** ( ) icon.

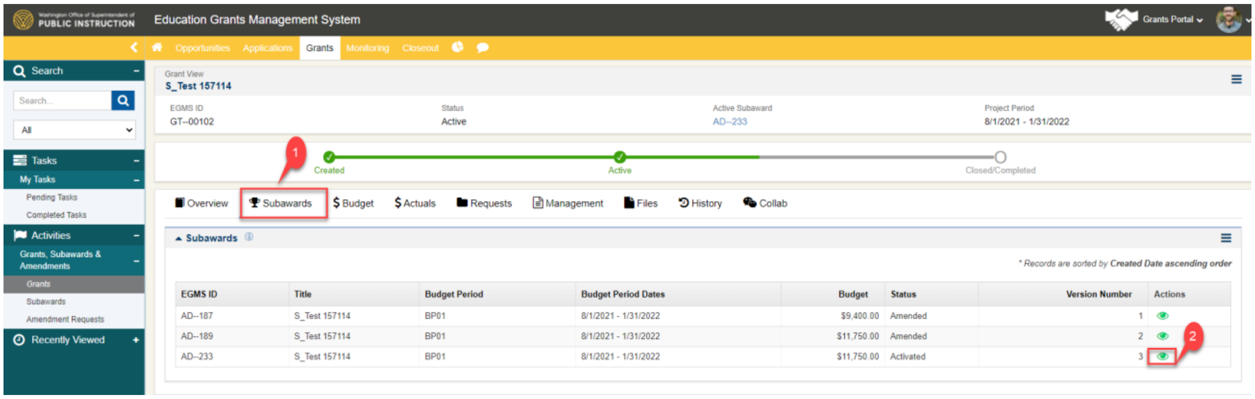


Figure 107: Accessing Active Subaward

On the Subaward page, navigate to the **Management** tab to create the Amendment Request. Navigate to the **Amendment** section and click on **New**.

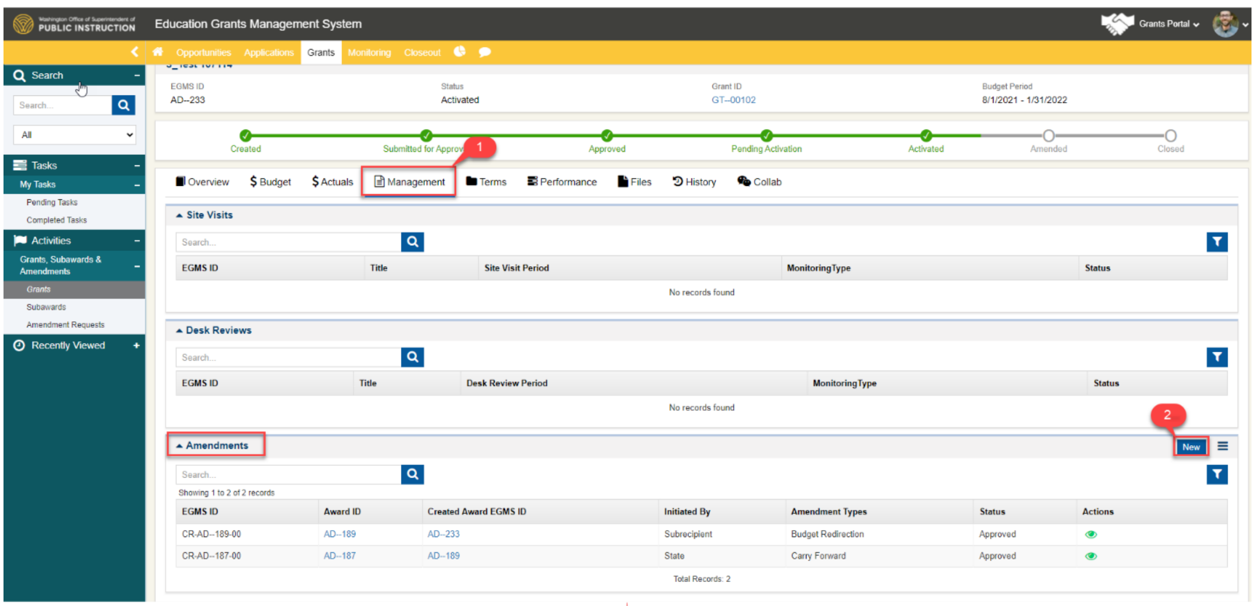


Figure 108: Creating an Amendment Request

From this screen, select the type of change request. Add the details for overall justification and the impact it would have on the existing subaward. Once complete, click the **Save and Continue** button.

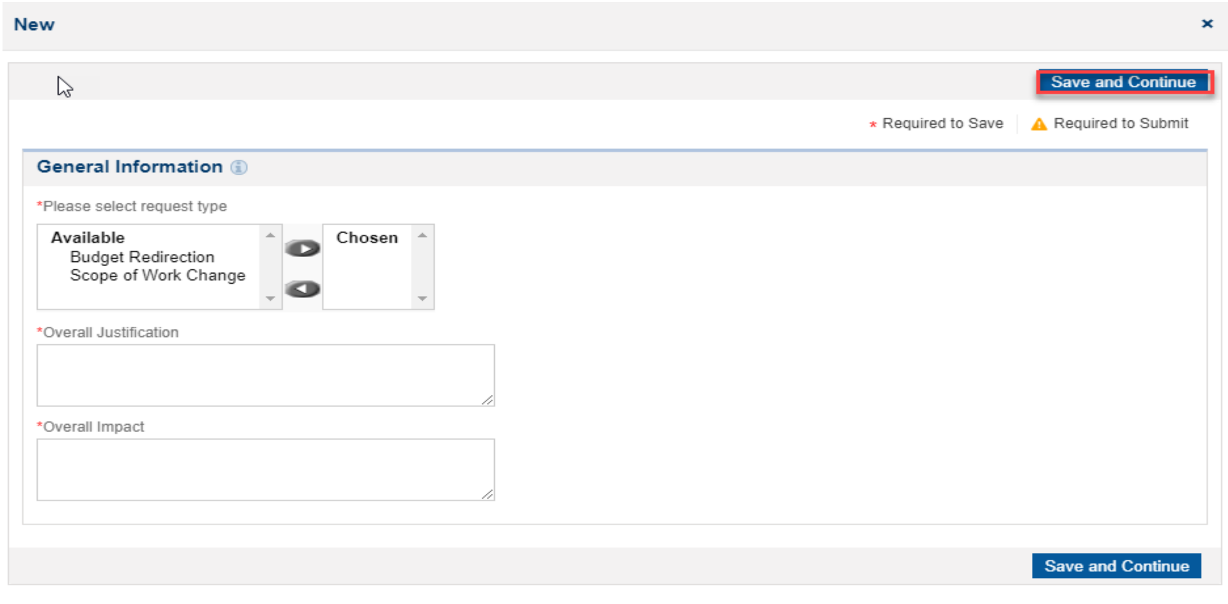


Figure 109: Select Amendment Request type

10.3.1.1 SCOPE OF WORK CHANGE REQUEST

District Users can make changes to the forms that were originally submitted as part of their initial Application. Scope of work can be initiated by Internal OSPI Users, as well LEAs. These changes can be made from the amendment record in the **Change in Scope** sections under the **Overview** Tab. Enter the additional information in this section and click on **Save** once complete. All required fields have either a red asterisk or an orange alert icon.

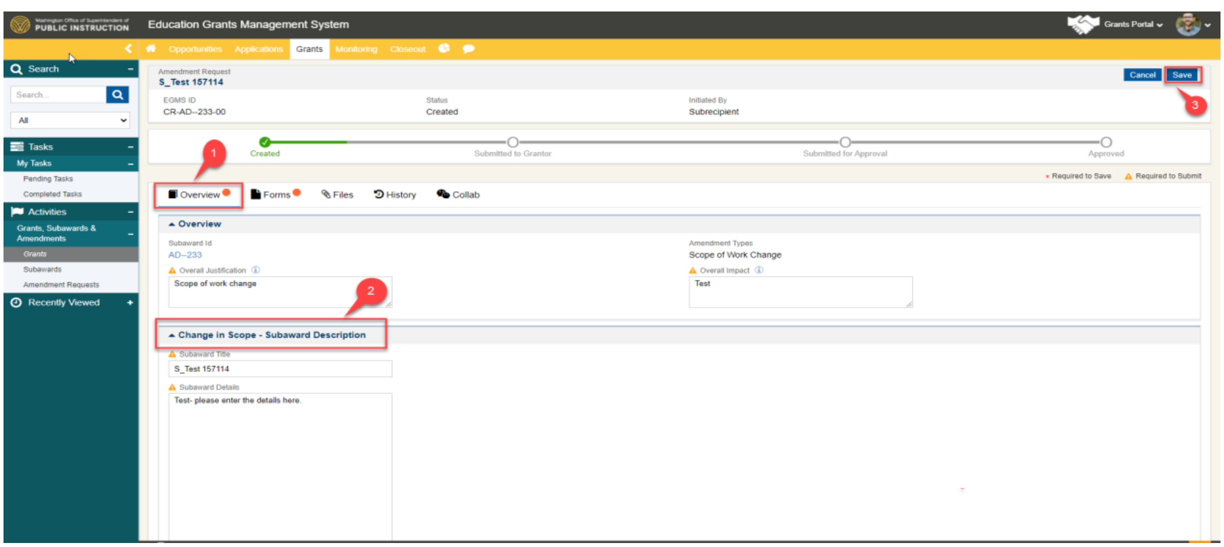


Figure 110: Overview tab

Navigate to **Forms** tab and complete the Applicant Response field. Click on **Forms** and choose the form(s) that you are requesting to be Edit**,** check **Request Amendment** and click on **Save**.

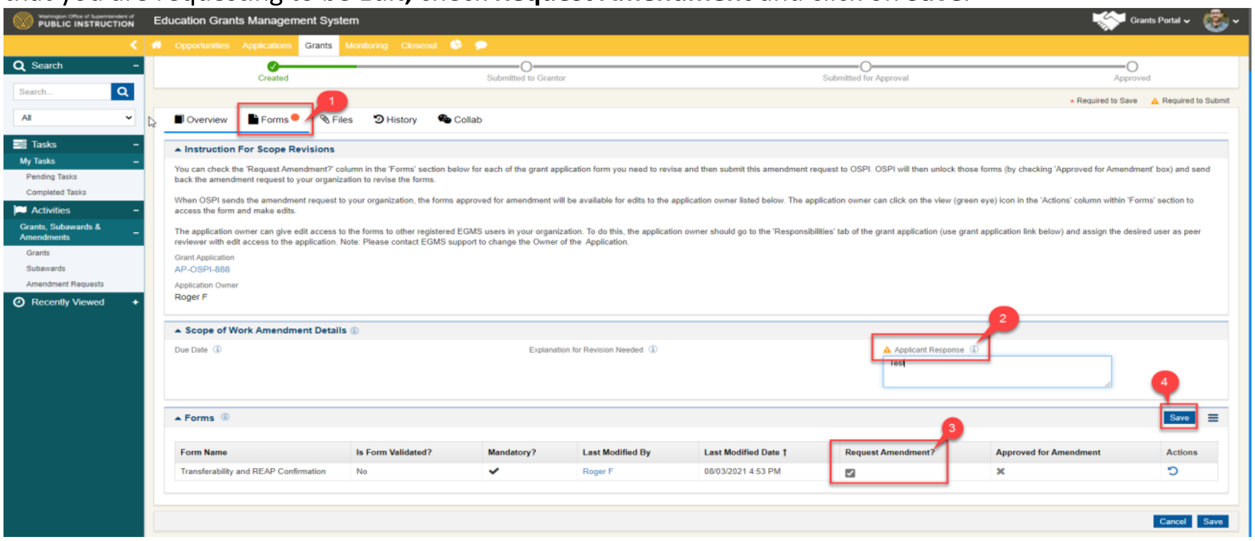


Figure 111: Creating a Scope of Work Amendment Request

Navigate to **Files** tab, to add attachment or notes, click on **Add** button in front of the section respectively.

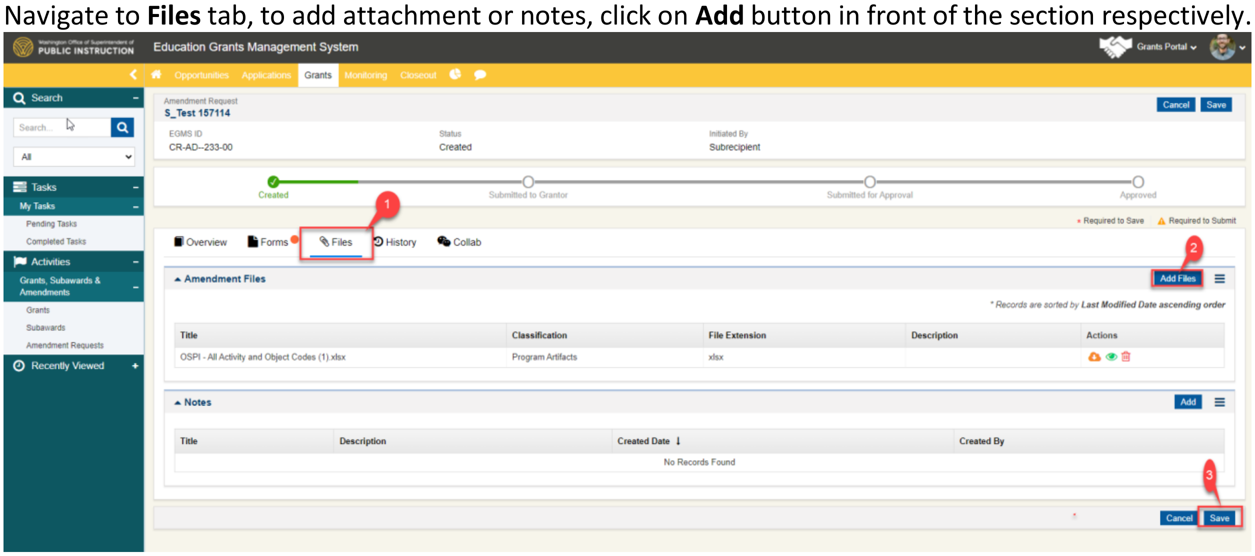


Figure 112: Add Attachments and Notes

Once Complete, click the **Save** button and then click on **Submit to the Grantor** button to submit the amendment request to grantor.

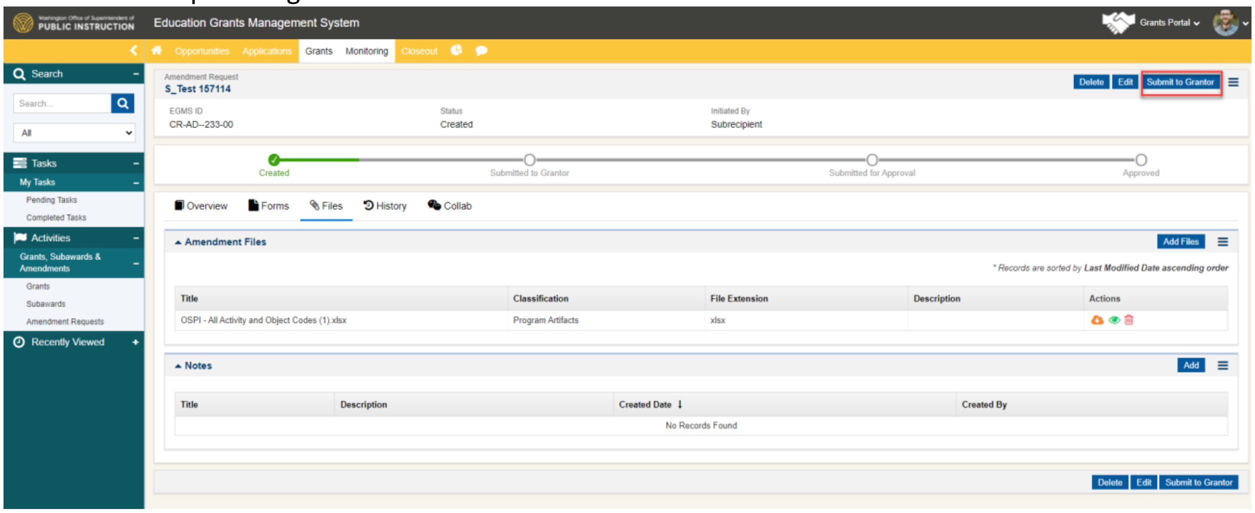


Figure 113: Submit to Grantor

Once you click on **Submit to Grantor** button the status will change to **Submitted to Grantor**.

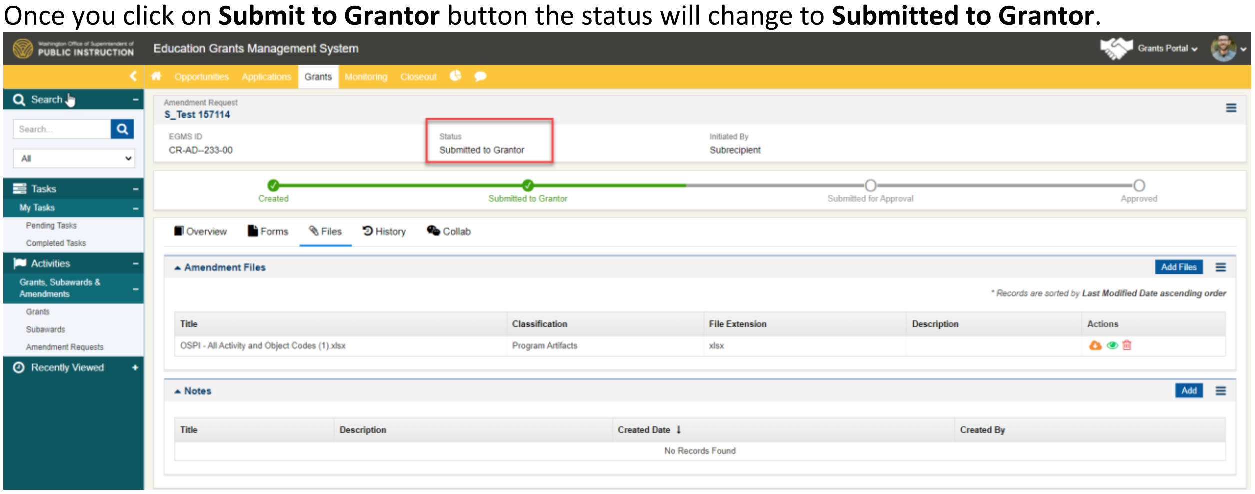


Figure 114: Submit Amendment Request to Grantor

10.3.1.2 BUDGET PERIOD CHANGE REQUEST

Budget period change request can be initiated only by Internal OSPI Users. District users cannot **Edit** the Budget Period Change, they can only **Acknowledge** and accept the new Budget Period Start Date and End Date.

Click on the **Acknowledge** button and the status will change to Acknowledged.

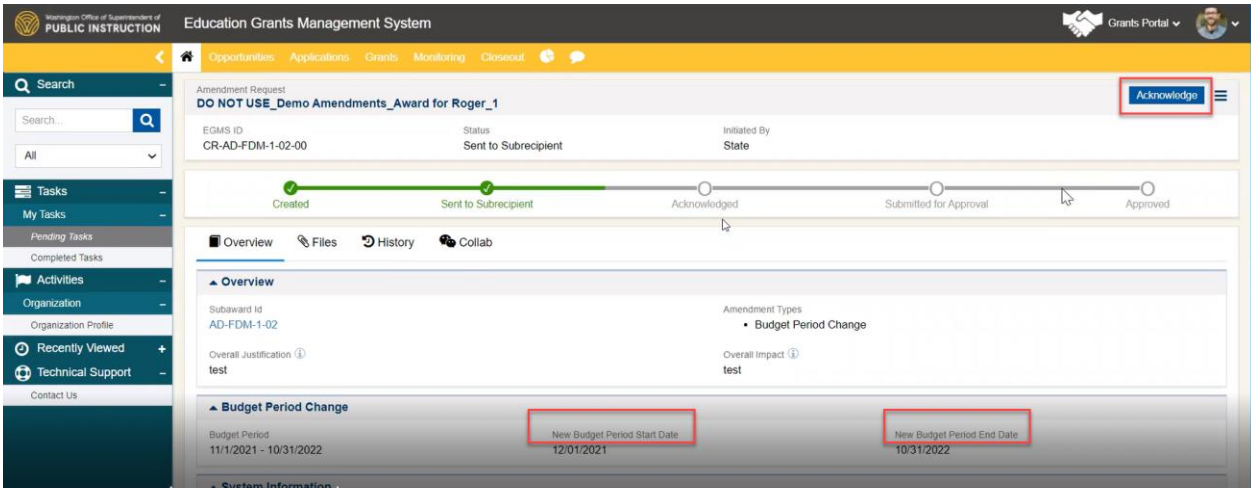


Figure 115: Acknowledging the Budget Period Change Request

10.3.1.3 BUDGET REDIRECTION CHANGE REQUEST

Under the **Overview** tab, enter the required details in Overall Justification, Overall Impact, and Justification for Budget Redirection fields in the **Overview** section.

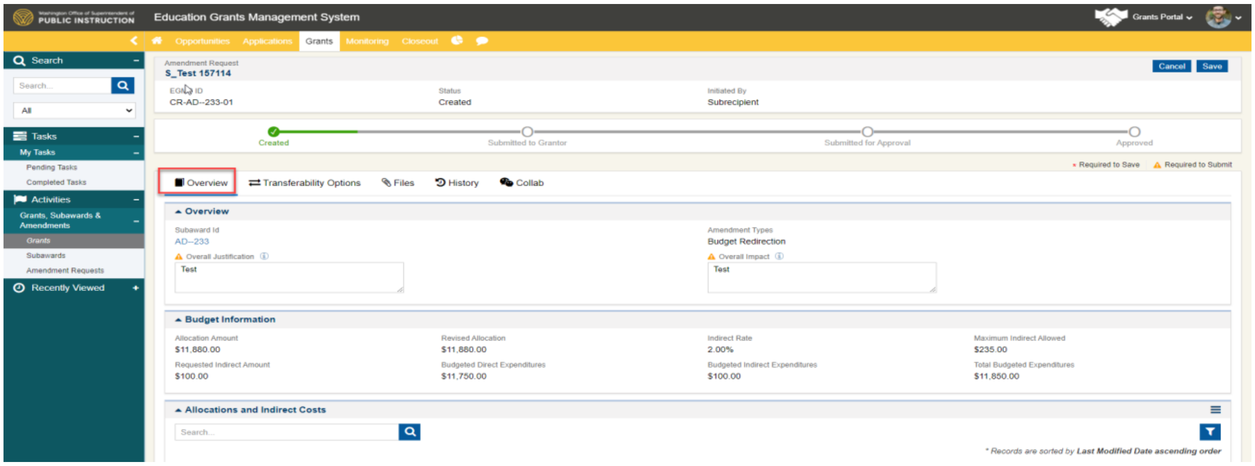


Figure 116: Creating a Change Request - Overview

Users can make changes to the **Budget Categories** grid under the **Budget Change** section. To make any budget change, click on the action icon beside the line item in which the awarded budget value requires edits. Enter the revised budget value in the fields and click on **Save** once done.

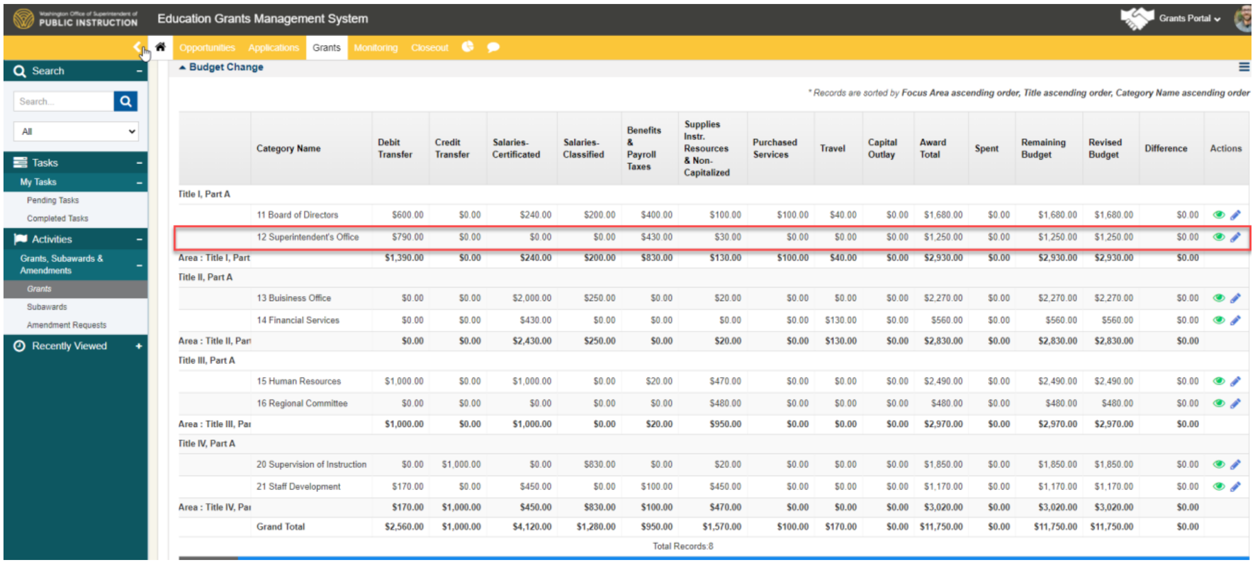


Figure 117: Creating a Change Request - Budget Change

Navigate to **Transferability Options** and complete the **Purpose** and **Transferability Details** section.

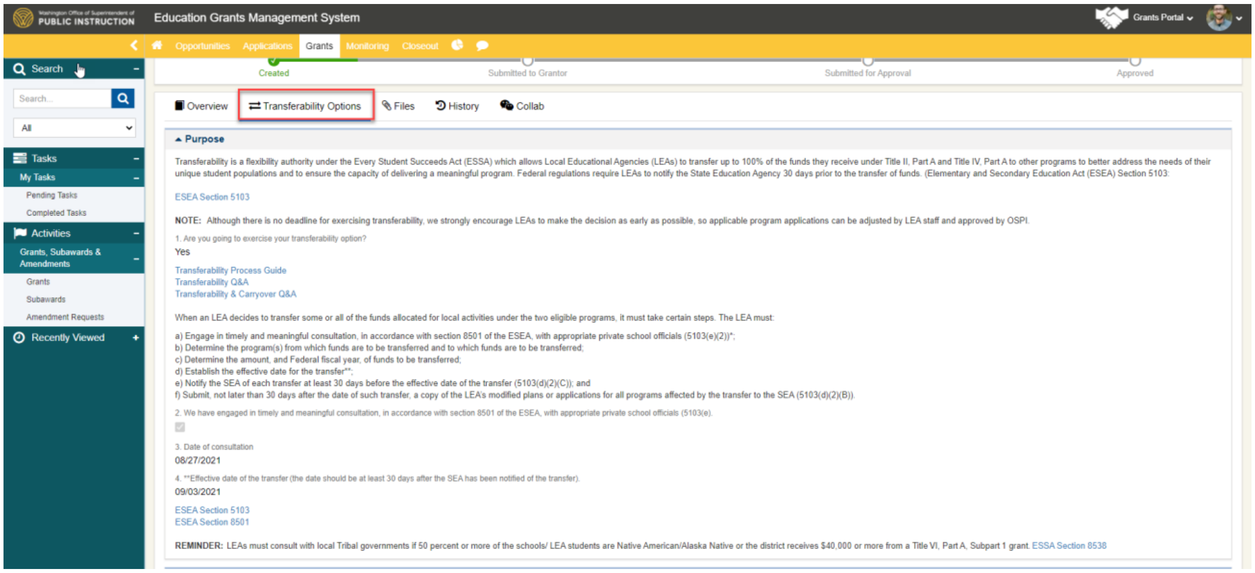


Figure 118: Transferability Options

Navigate to **Files** tab, to add attachment or notes, click on **Add** button in front of the section respectively and click **Save**.

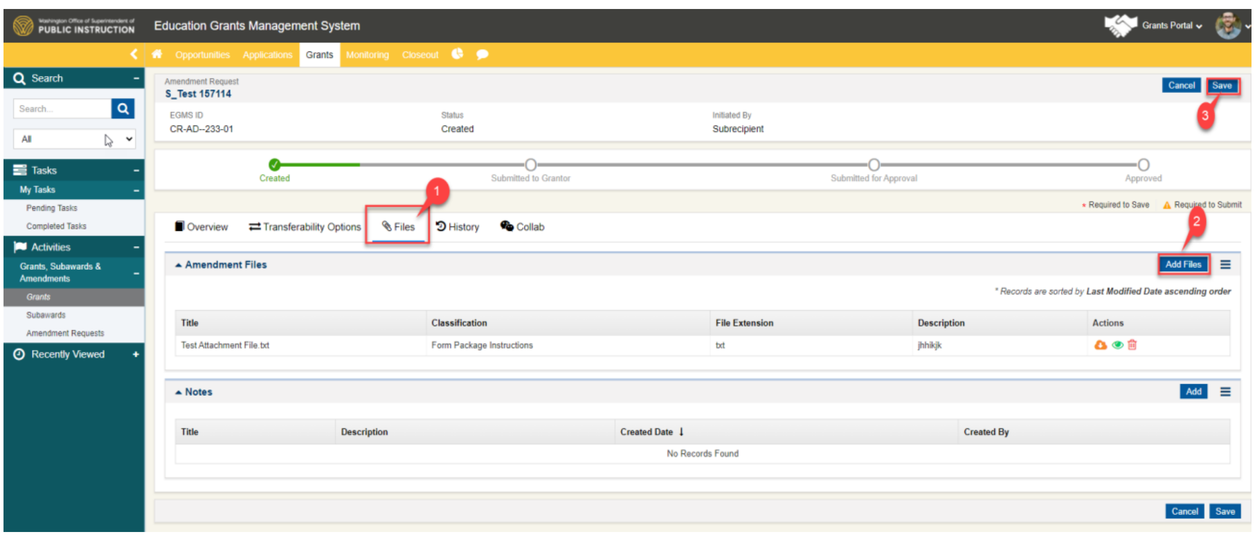


Figure 119: Add Attachments and Notes

Once complete, click the **Save** button and then click on **Submit to the Grantor** button. The status will change to **Submitted to Grantor**.

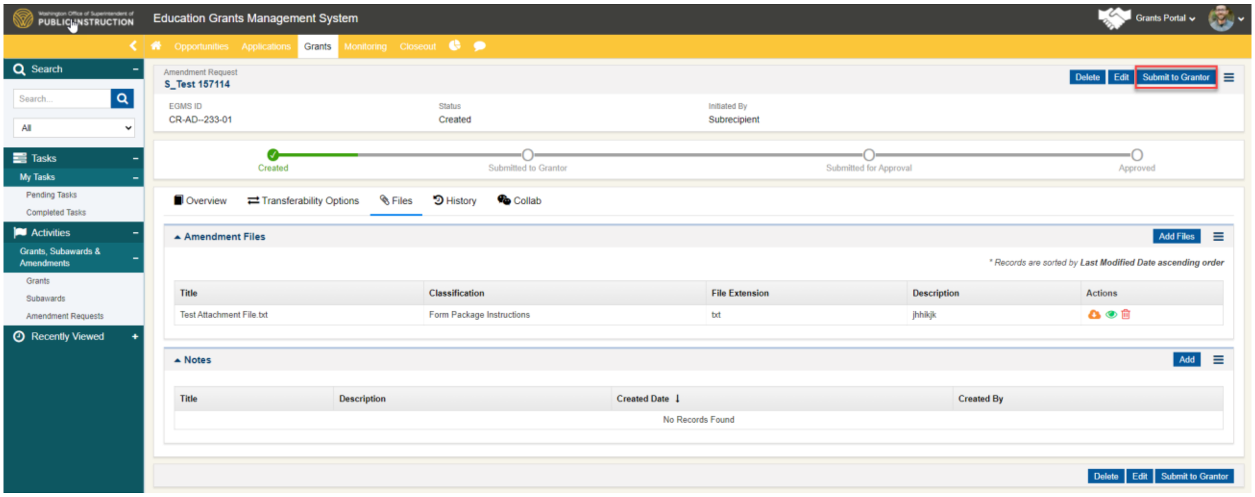


Figure 120: Submit Amendment Request to Grantor

10.3.1.4 CARRY FORWARD REQUEST

Carry Forward change request can be initiated only by Internal OSPI Users and sent to Subrecipient state. The Carry Forward change allows users to pull money from the previous subaward to the new subaward. The remaining amount from the previous subaward will be carried forward to the new subaward for the same parent grant

From the **Pending Tasks**, click on the **play icon** (▶) for the pending task that was created when the related amendment is sent to subrecipient users. The user will be navigated to the amendment request record.

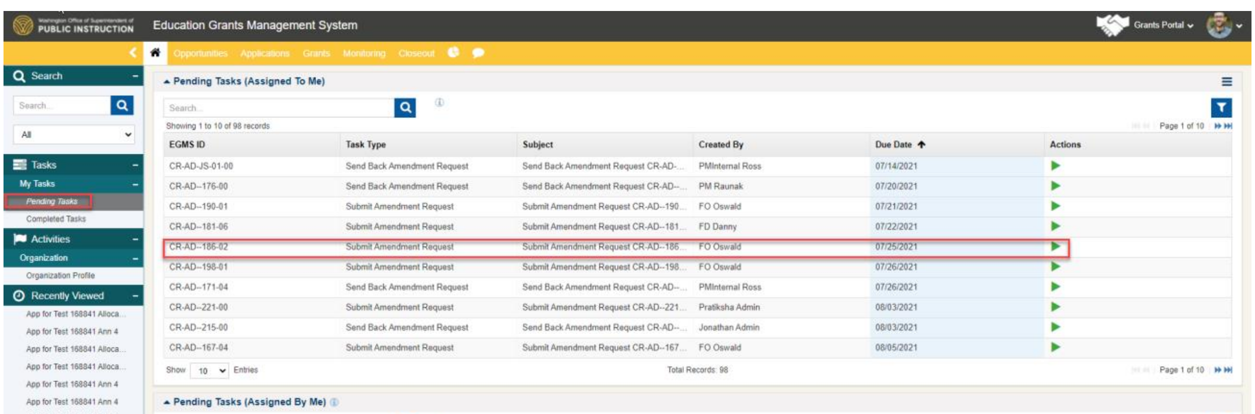


Figure 121: Pending task Play icon

From the amendment record, click on the **Overview** tab.

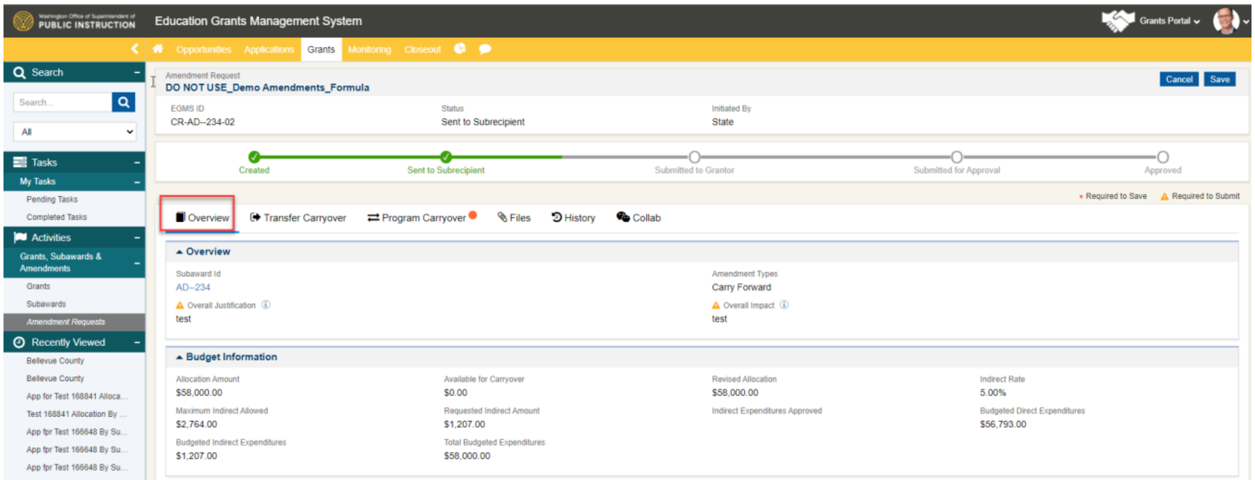


Figure 122: Overview tab

For an award without Allocations by Focus Area on the Announcement, you can or add/reduce dollar amount from the **Requested Indirect Amount** field on the Budget Information section.

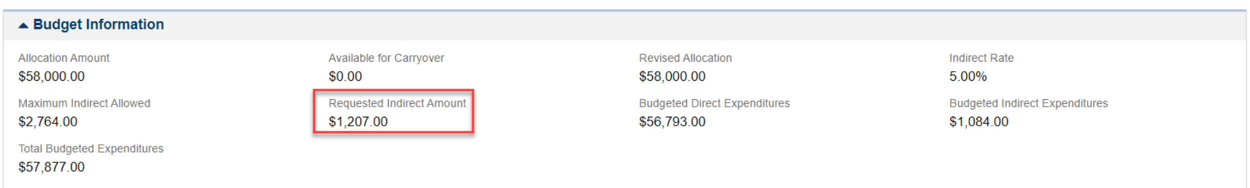


Figure 123: Requested Indirect Amount

For an award **with** Allocations **by Focus Area** on the Announcement, you can add/reduce dollar amount from the **Requested Indirect Amount** field on the Allocations and Indirect Cost section.

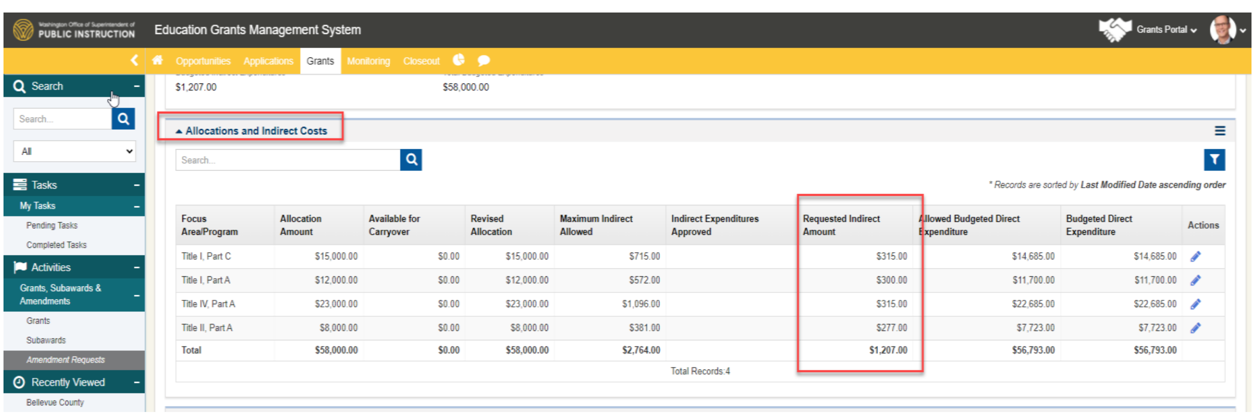
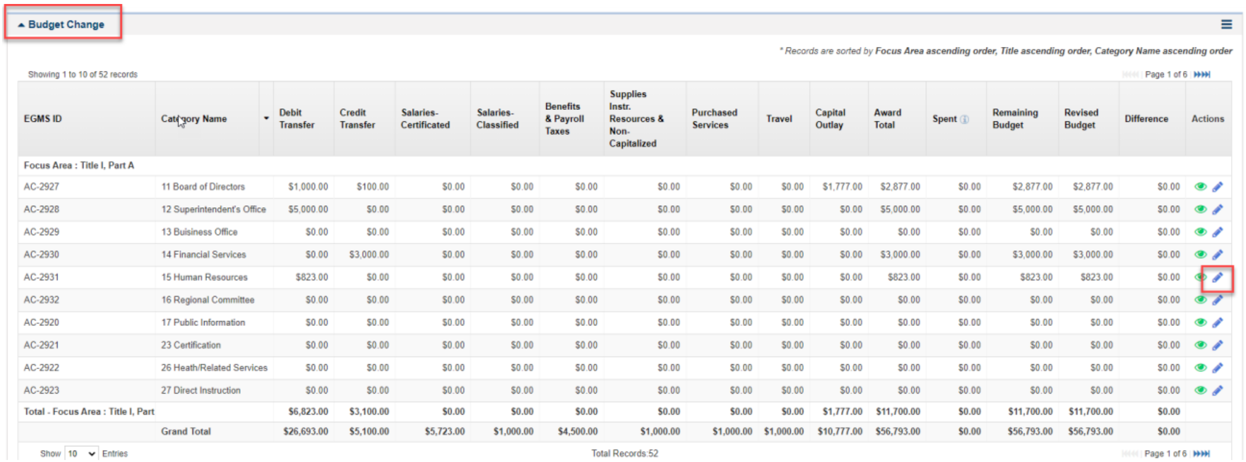


Figure 124: Allocation and Indirect Costs

Scroll down to the **Budget Change** section to make changes to the existing Budget and match the Budget with the updated allocations. If there is **Transfer Carryover** and **Program Carryover** tabs available, please complete the transfers before making changes to the Budget in the Overview tab.


Budget Change

* Records are sorted by Focus Area ascending order, Title ascending order, Category Name ascending order

Showing 1 to 10 of 52 records

Page 1 of 6

EGMS ID	Category Name	Debit Transfer	Credit Transfer	Salaries-Certificated	Salaries-Classified	Benefits & Payroll Taxes	Supplies Instr. Resources & Non-Capitalized	Purchased Services	Travel	Capital Outlay	Award Total	Spent	Remaining Budget	Revised Budget	Difference	Actions
Focus Area : Title I, Part A																
AC-2927	11 Board of Directors	$1,000.00	$100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,777.00	$2,877.00	$0.00	$2,877.00	$2,877.00	$0.00	
AC-2928	12 Superintendent's Office	$5,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$5,000.00	$0.00	$5,000.00	$5,000.00	$0.00	
AC-2929	13 Buisiness Office	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
AC-2930	14 Financial Services	$0.00	$3,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$3,000.00	$0.00	$3,000.00	$3,000.00	$0.00	
AC-2931	15 Human Resources	$823.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$823.00	$0.00	$823.00	$823.00	$0.00	
AC-2932	16 Regional Committee	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
AC-2920	17 Public Information	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
AC-2921	23 Certification	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
AC-2922	26 Heath/Related Services	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
AC-2923	27 Direct Instruction	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
Total - Focus Area : Title I, Part		$6,823.00	$3,100.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,777.00	$11,700.00	$0.00	$11,700.00	$11,700.00	$0.00	
	Grand Total	$26,693.00	$5,100.00	$5,723.00	$1,000.00	$4,500.00	$1,000.00	$1,000.00	$1,000.00	$10,777.00	$56,793.00	$0.00	$56,793.00	$56,793.00	$0.00	

Show 10 Entries Total Records:52 Page 1 of 6

Figure 125: Budget change

For an award **with** Allocations by **Focus Area** on the Announcement, navigate to the **Transfer Carryover** tab and complete all the required details.

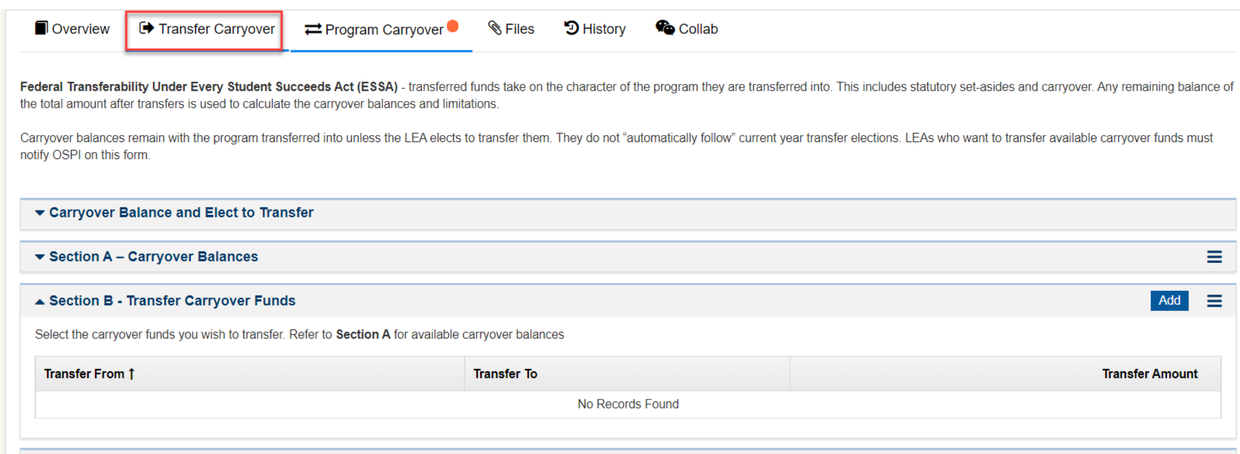


Figure 126: Transfer Carryover

In the Transfer Carryover tab, scroll down to the **Section B** – Transfer Carryover Funds section and click on **Add** button. Enter a **Transfer From**, **Transfer To** focus areas and **Transfer Amount**.

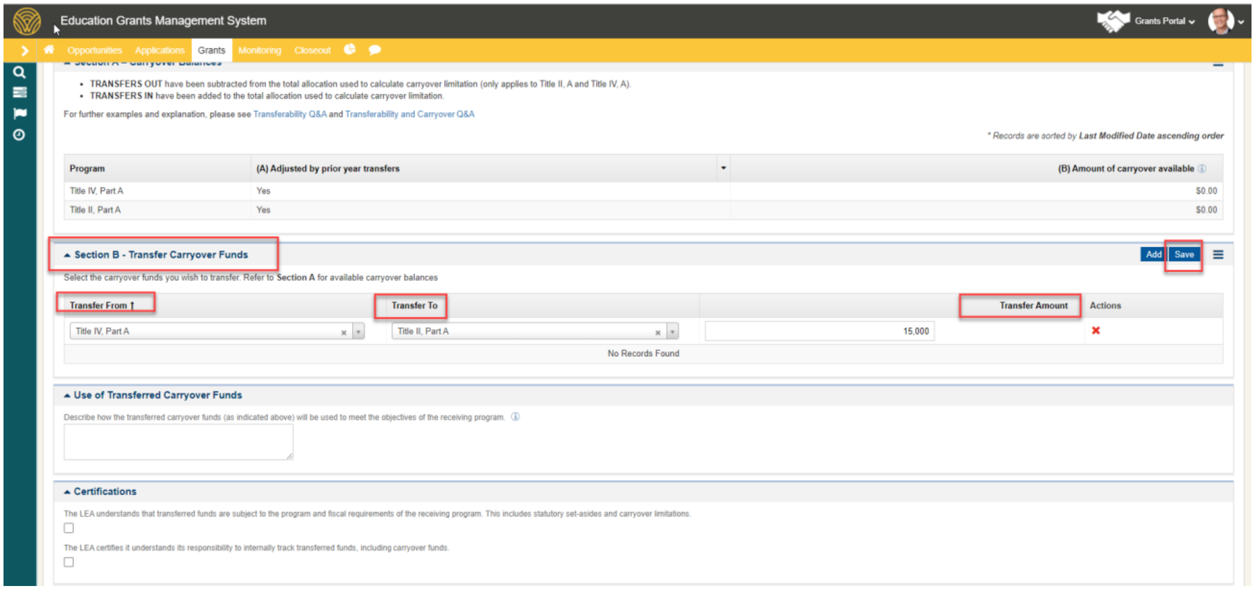


Figure 127: Section B Transfer Carryover Funds

Complete the Use of **Transferred Carryover Funds** details and **Certification** section and Click on **Save**.

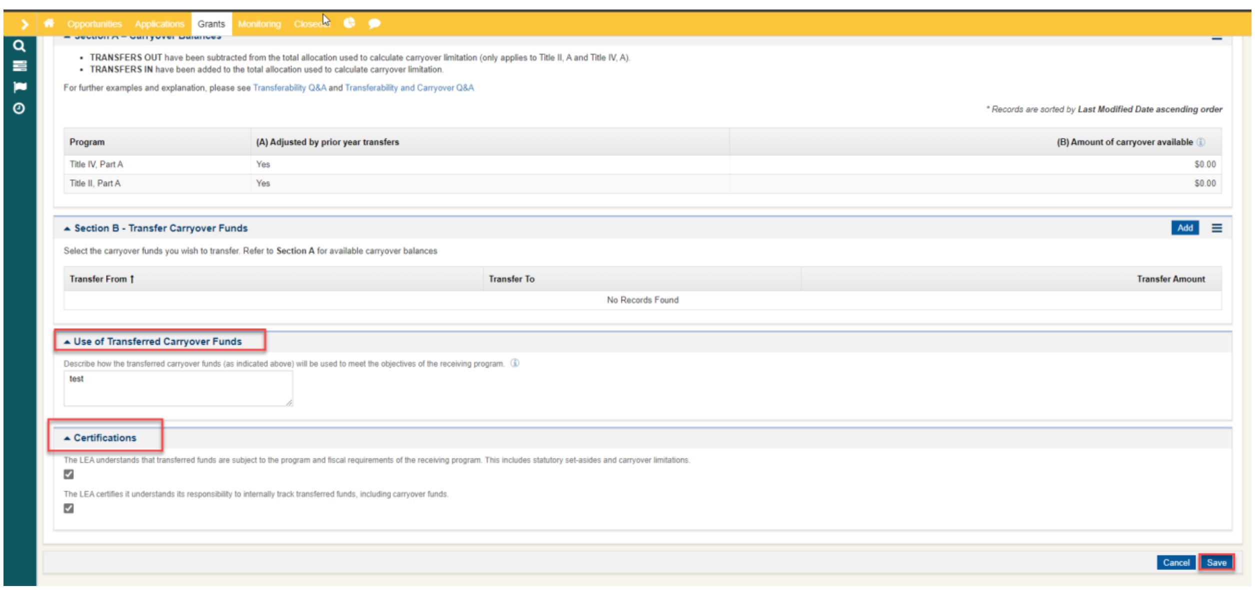


Figure 128: Use of Transferred Carryovers Funds and Certifications

For an award with **Allocations by Focus Area** on the Announcement, navigate to the **Program Carryover** tab and complete all the required details.

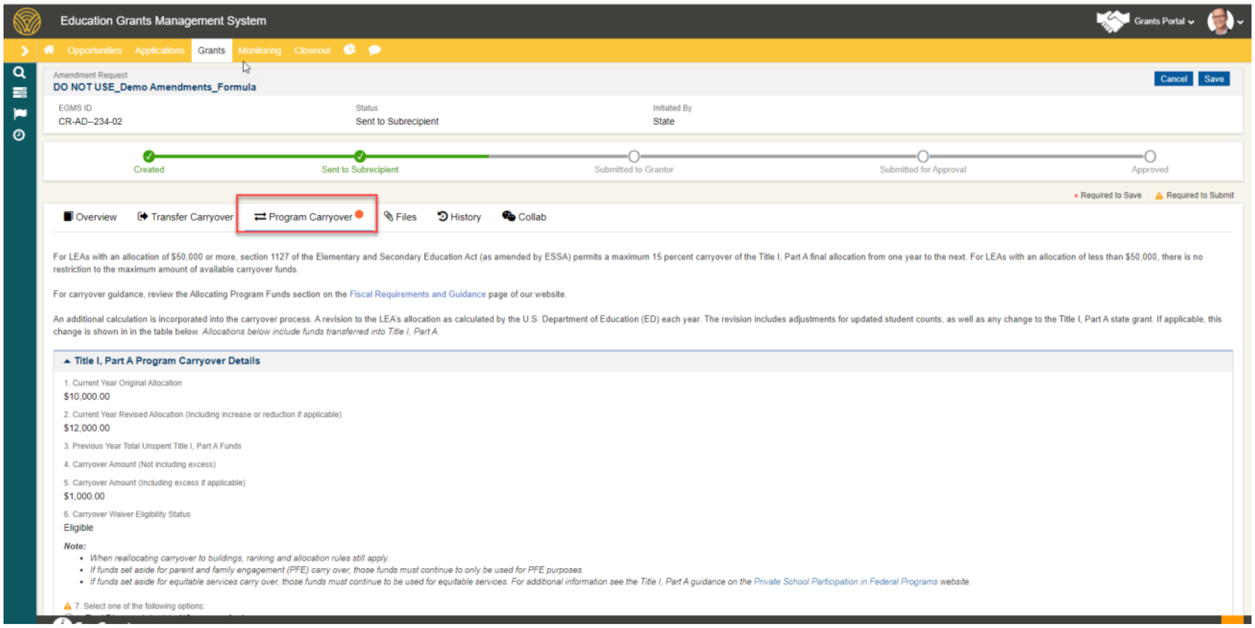


Figure 129: Program Carryover

Note:

- For Awards that have Allocations by Focus Area on the Announcement , Revised Allocation is equal to the sum of 'Allocation Amount' , 'Available for Carryover' and Net Carryover Transfer Amounts from the 'Transfer Carryover' tab.

- For Awards that have Allocations by Focus Area on the Announcement , Revised Allocation for Title I, Part A is equal to the sum of 'Allocation Amount' , Question 9 is the 'Program Carryover' tab and Net Carryover Transfer Amounts from the 'Transfer Carryover' tab .

- For Awards that **do not** have Allocations by Focus Area on the Announcement, 'Revised Allocation' is equal to the sum of 'Allocation Amount' and 'Available for Carryover' fields.

In the Title I, Part A Program Carryover Details section, select an option for question 7.

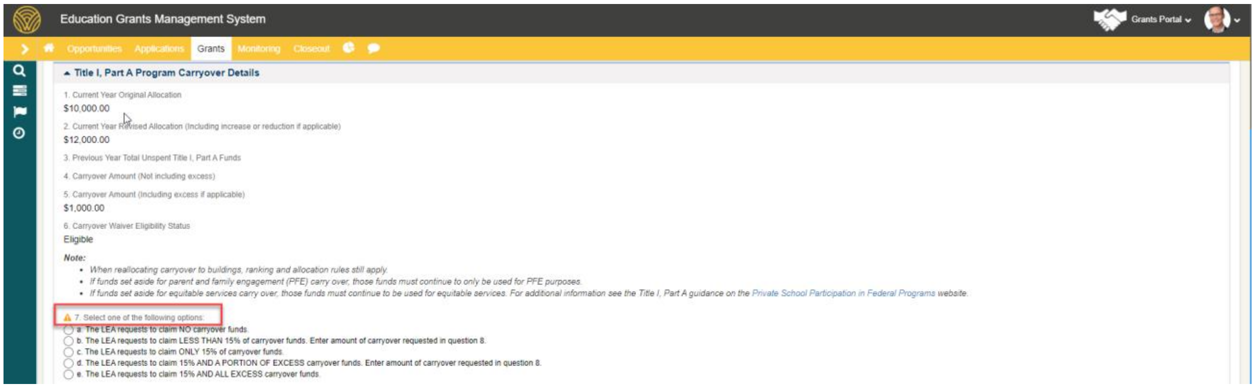


Figure 130: Title I, Part A Program Carryover Details

Depending on the radio button selected, the system will populate question 9 in **Carryover Amount for Title I, Part A Budget Revision** section and add that carryover amount to the **Revised Allocation** for Title I, Part A in the Overview tab.

For option a – the system will not add any carryover amount

For option b – the system will add the amount specified in question 8

Option c- the system will add the amount specified in the overview tab, **Available for carryover** for Title I, Part A

Option d- the system will add the amount specified in question 8

Option e – the system will add amount from the Carryover Amount (Including excess if applicable) field (question 5 in the same section)

Figure 131: Carryover Amount

Complete the required fields under the Carryover Explanations for Other Programs and Authorized Signature and click on **Save**.

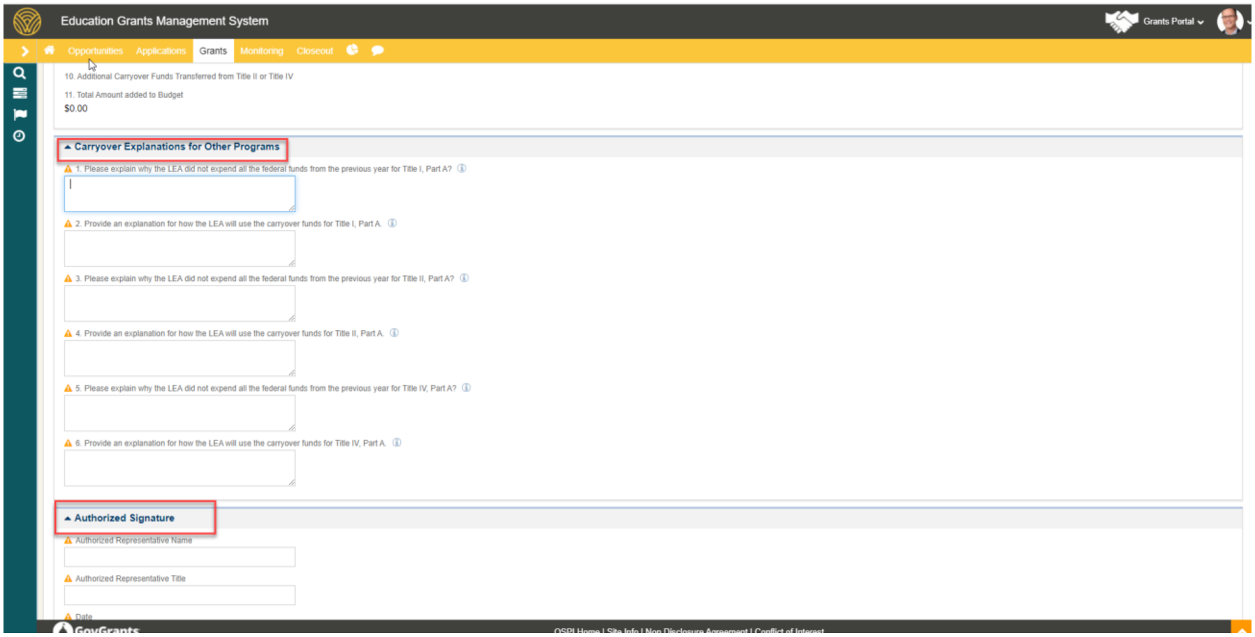


Figure 132: Authorized Signature

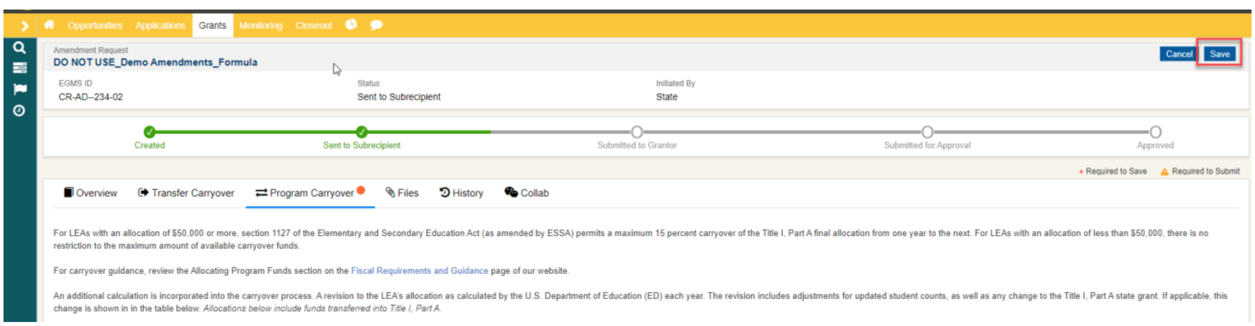


Figure 133: Save the data

After making the necessary updates, click on **Submit to Grantor** button.
The request will be sent to the grantor, and the status will change to **Submitted to Grantor**.

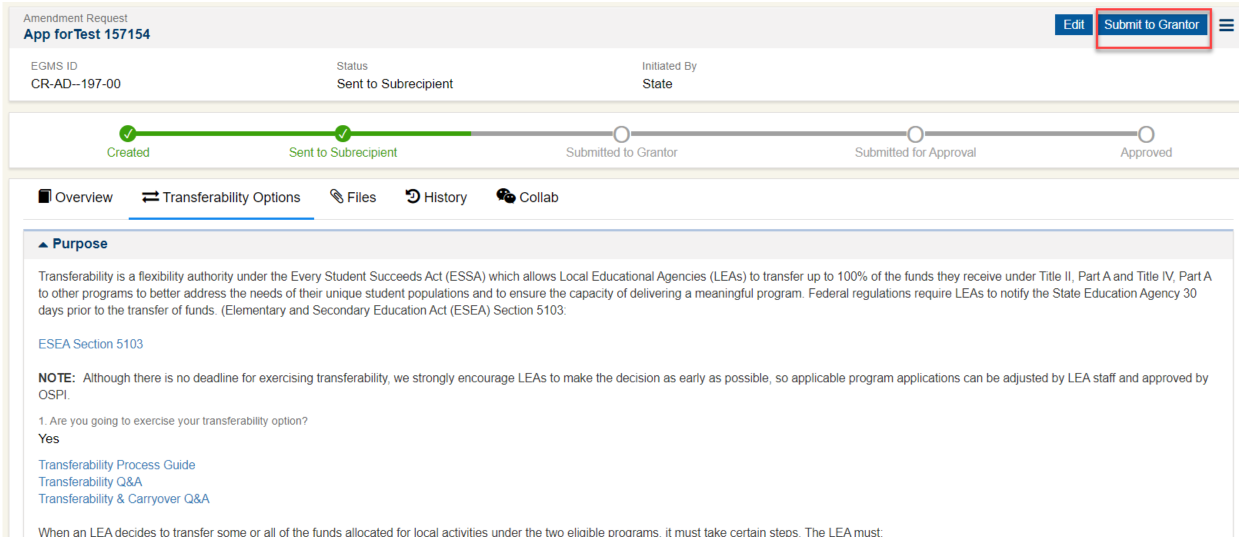


Figure 134: Submit to Grantor

10.3.1.5 PERIODIC RENEWAL REQUEST

The Grantor users will create the **Periodic Renewal** amendment request and send it to the subrecipient.

Login to the **EGMS** recipient portal. Under Grants phase, click on Pending Tasks link under **My Tasks** in the left navigation panel.

In the **Pending Tasks (**Assigned To Me) table, click on the play icon to start the process for the related award periodic renewal amendment request.

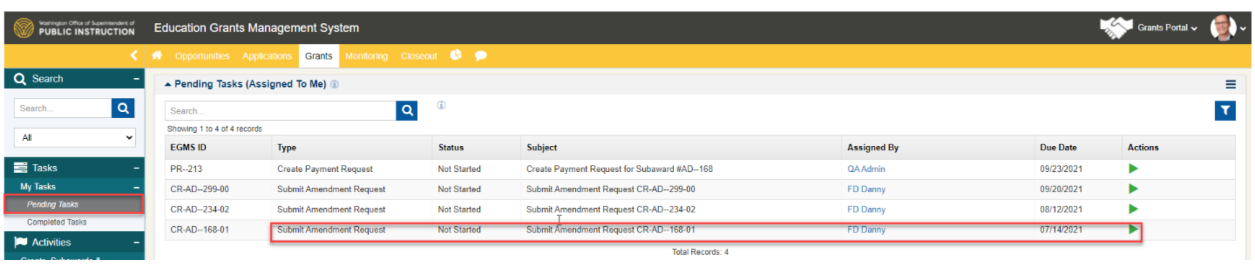


Figure 735: Periodic Renewal Request

From the amendment record, click on the **Overview** tab and you can add/update the new Indirect amount.

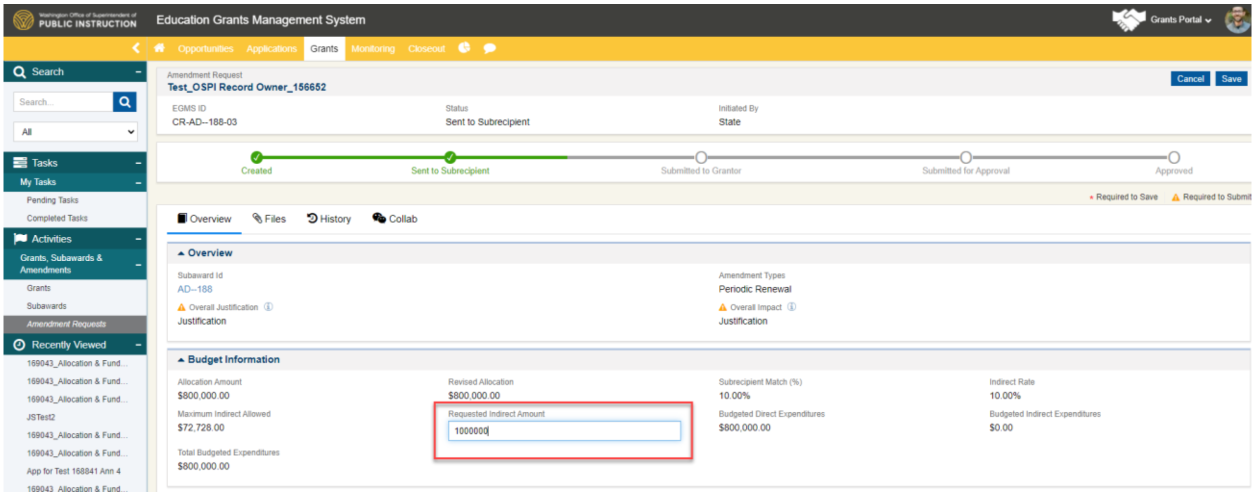


Figure 836: Add/Update Requested Indirect Amount

Scroll down to the Budget Change and click on the pencil ( ) icon to complete the new Budget that has been set up during the amendment request.

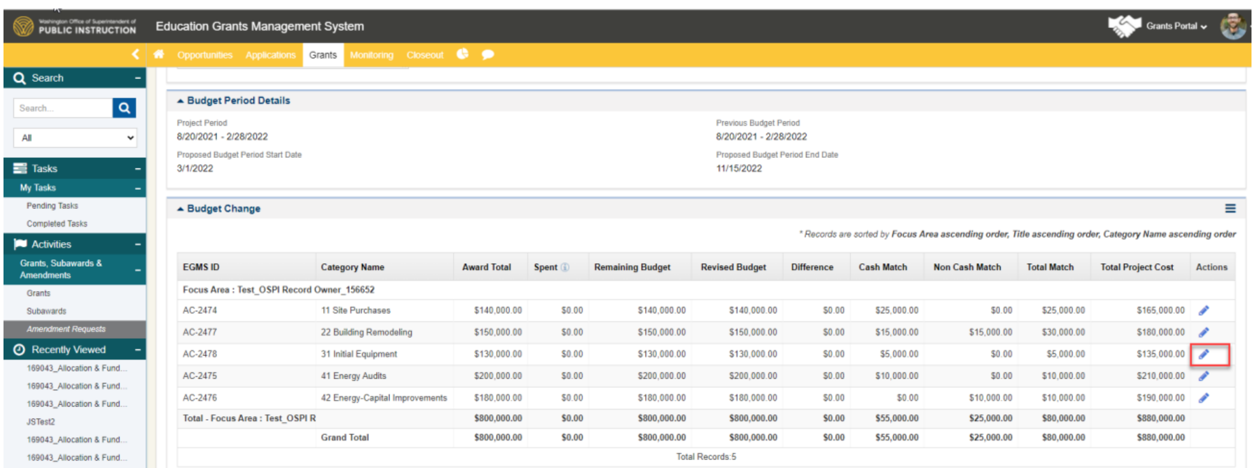


Figure 937: Budget Change update

Once all required details are provided, click the **Save** button. On completion, click **Submit to Grantor** Button. The status will change to **Submitted to Grantor.**

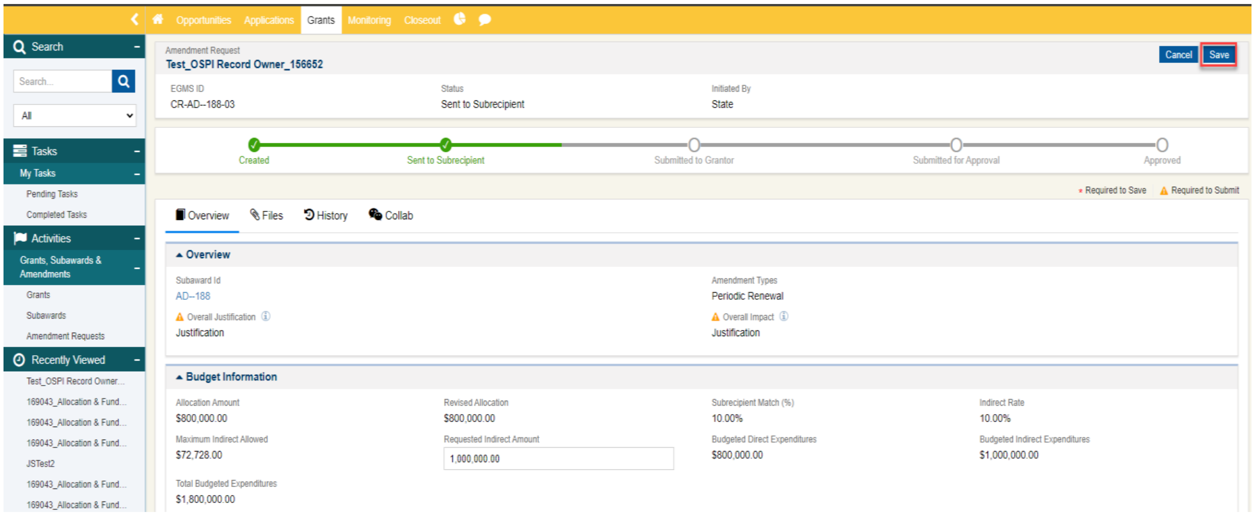


Figure 1038: Save the Periodic Renewal data

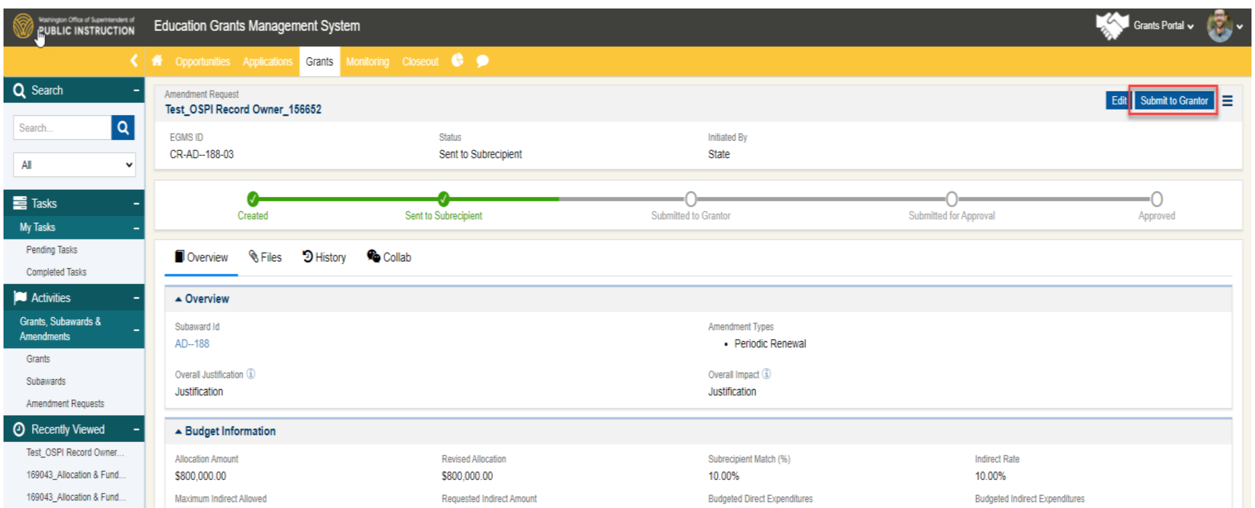


Figure 1139: Submit to Grantor

10.3.1.6 FUNDING CHANGE REQUEST

Internal OSPI users (Amendment Record Owner) will create the **Funding Change** amendment request and send it to the LEAs.

Login to the **EGMS** recipient portal. Under the **Grants** phase, click on the Pending Tasks link under **My Tasks** in the left navigation panel.

In the **Pending Tasks** (Assigned To Me) table, click on the play icon ( )to start the process for the related Funding Change Request Amendment request record.

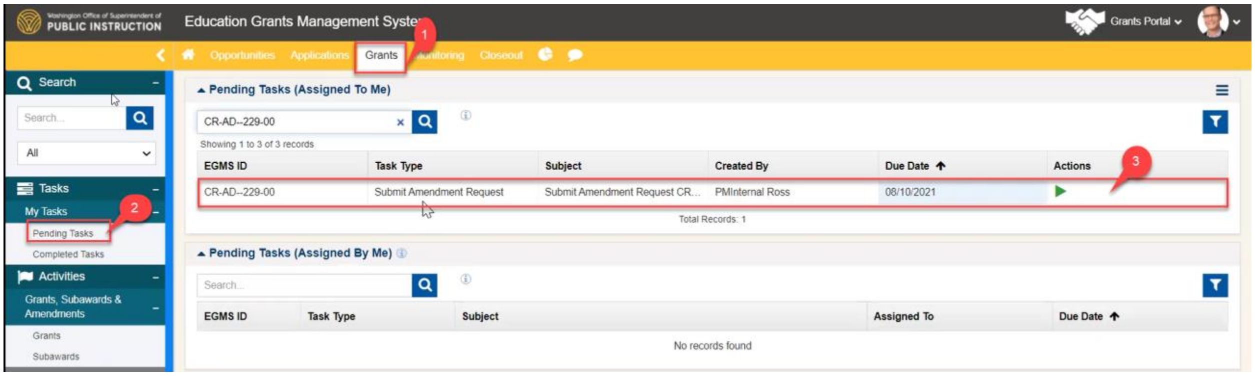


Figure 1240: Funding Change Request

Note:

- For Awards that have Allocations by Focus Area on the Announcement, 'Transferability Options' tab is available on the Funding Change Amendment request to allow transfers from Focus Areas.
- For Awards that **do not** have Allocations by Focus Area on the Announcement, 'Transferability Options' tab is **not** available on the Funding Change Amendment.
- For Awards that have Allocations by Focus Area on the Announcement , Revised Allocation is equal to the sum of 'Allocation Amount' , 'Requested Change in Budget' and Net Transfer Amounts from the 'Transferability Options' tab.
- For Awards that **do not** have Allocations by Focus Area on the Announcement, 'Revised Allocation' is equal to the sum of 'Allocation Amount' and 'Requested Change in Budget' fields.

Click the Edit button in the top-right of the page. This will put the amendment in edit mode so that you can edit the information. To make any changes in the Budget, navigate to the **Budget change** section under **the Overview** tab.
For an award without Allocations by Focus Area on the Announcement, you can add/reduce the dollar amount from the 'Requested Indirect Amount' field on the Budget Information section. Click on the edit icon under the actions column to edit the budget amount. Once done, click the **Save** button.

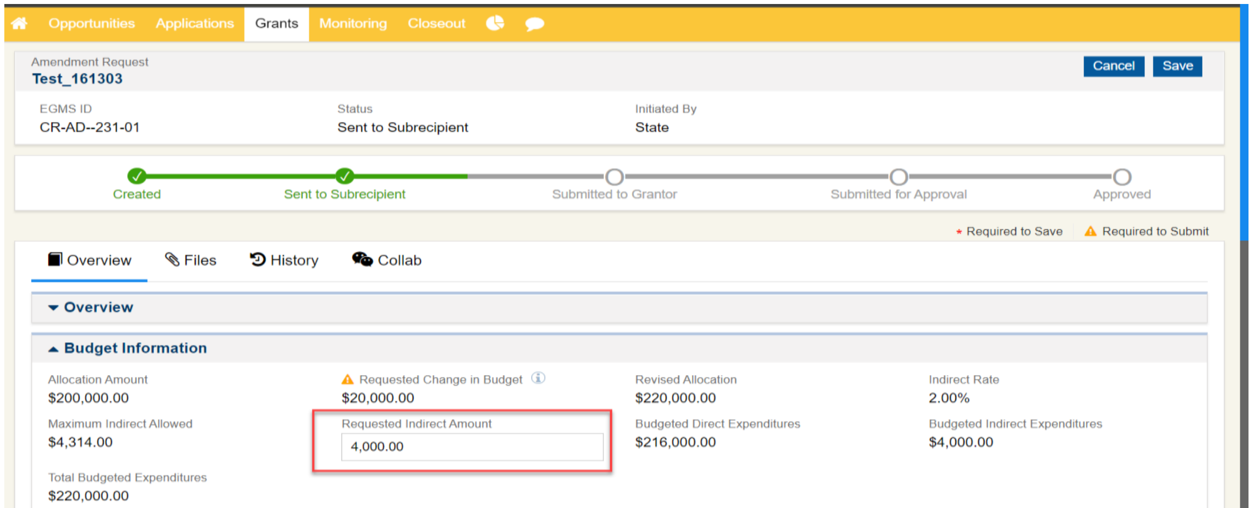


Figure 1341: Requested Indirect Amount Overview

For an award with Allocations by Focus Area on the Announcement, you can add/reduce the dollar amount from the 'Requested Indirect Amount' field on the Allocations and Indirect Cost section.

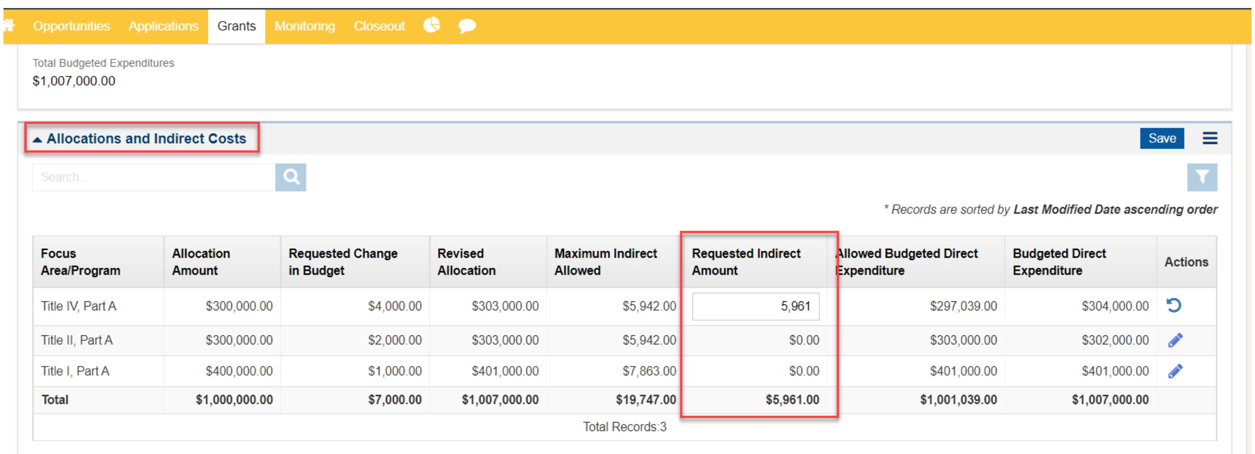
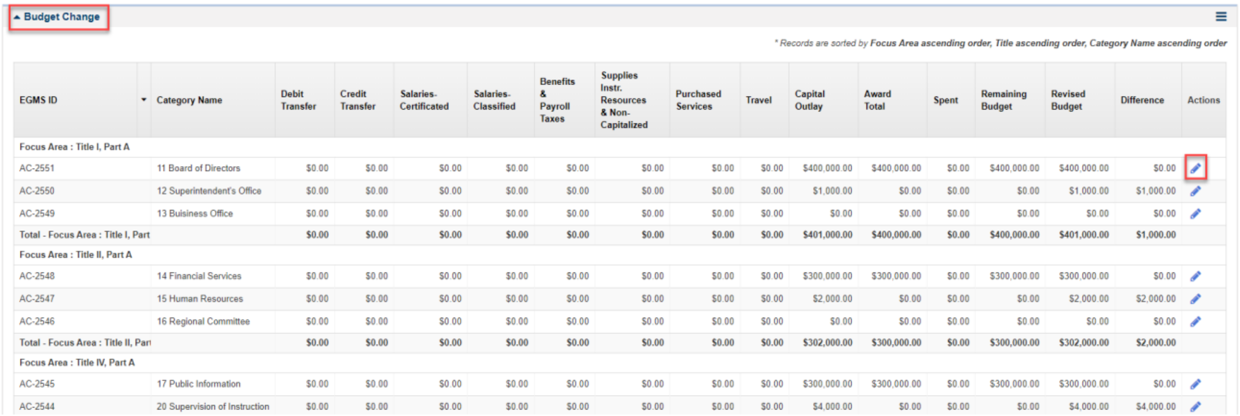


Figure 1442: Allocations and Indirect Cost

Scroll down to the **Budget Change** section to change the existing Budget and match the Budget with the updated allocations. If there is a Transferability Option' tab available, please complete the transfers before making changes to the Budget in the **Overview** tab.



▲ Budget Change

* Records are sorted by **Focus Area ascending order, Title ascending order, Category Name ascending order**

EGMS ID	Category Name	Debit Transfer	Credit Transfer	Salaries-Certificated	Salaries-Classified	Benefits & Payroll Taxes	Supplies Instr. Resources & Non-Capitalized	Purchased Services	Travel	Capital Outlay	Award Total	Spent	Remaining Budget	Revised Budget	Difference	Actions
Focus Area : Title I, Part A																
AC-2551	11 Board of Directors	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$400,000.00	$400,000.00	$0.00	$400,000.00	$400,000.00	$0.00	
AC-2550	12 Superintendent's Office	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$1,000.00	$0.00	$0.00	$0.00	$1,000.00	$1,000.00	
AC-2549	13 Buisiness Office	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
Total - Focus Area : Title I, Part		**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$401,000.00**	**$400,000.00**	**$0.00**	**$400,000.00**	**$401,000.00**	**$1,000.00**	
Focus Area : Title II, Part A																
AC-2548	14 Financial Services	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$300,000.00	$300,000.00	$0.00	$300,000.00	$300,000.00	$0.00	
AC-2547	15 Human Resources	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$2,000.00	$0.00	$0.00	$0.00	$2,000.00	$2,000.00	
AC-2546	16 Regional Committee	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	
Total - Focus Area : Title II, Par		**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$302,000.00**	**$300,000.00**	**$0.00**	**$300,000.00**	**$302,000.00**	**$2,000.00**	
Focus Area : Title IV, Part A																
AC-2545	17 Public Information	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$300,000.00	$300,000.00	$0.00	$300,000.00	$300,000.00	$0.00	
AC-2544	20 Supervision of Instruction	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$4,000.00	$0.00	$0.00	$0.00	$4,000.00	$4,000.00	

Figure 1543: Budget Change

For an award with Allocations by Focus Area on the Announcement, navigate to the **Transferability Options** tab and enter the required details in the Purpose section.

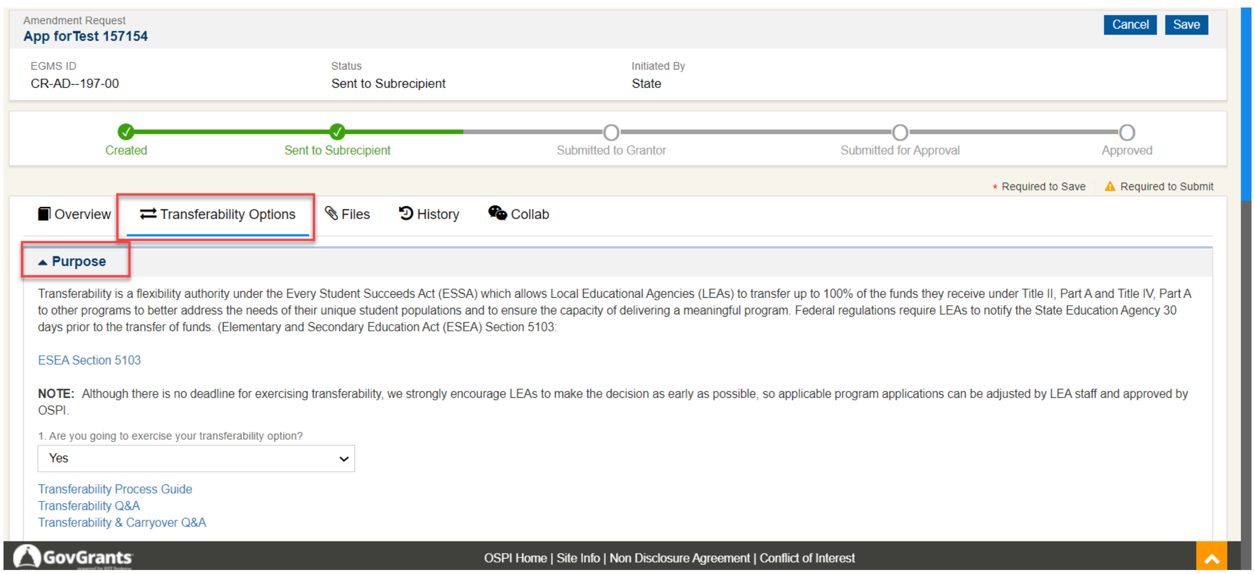


Figure 1644: Transferability Options- Purpose

In the **Transferability Options** tab, scroll down to the Transferability Details section and click on the **Add** button. Enter a **Transfer From**, **Transfer To** focus areas, and **Transfer Amount**. Click on **Save**.

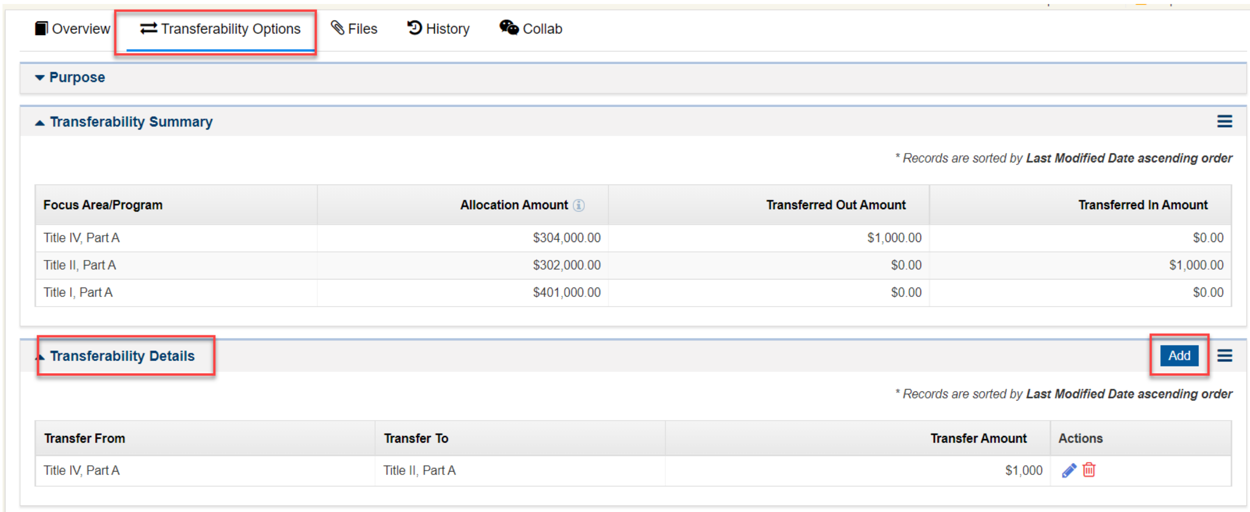


Figure 1745: Transferability Details

Once completed, click on **Submit to Grantor** button. Once clicked, the status will change to **Submitted to Grantor.**

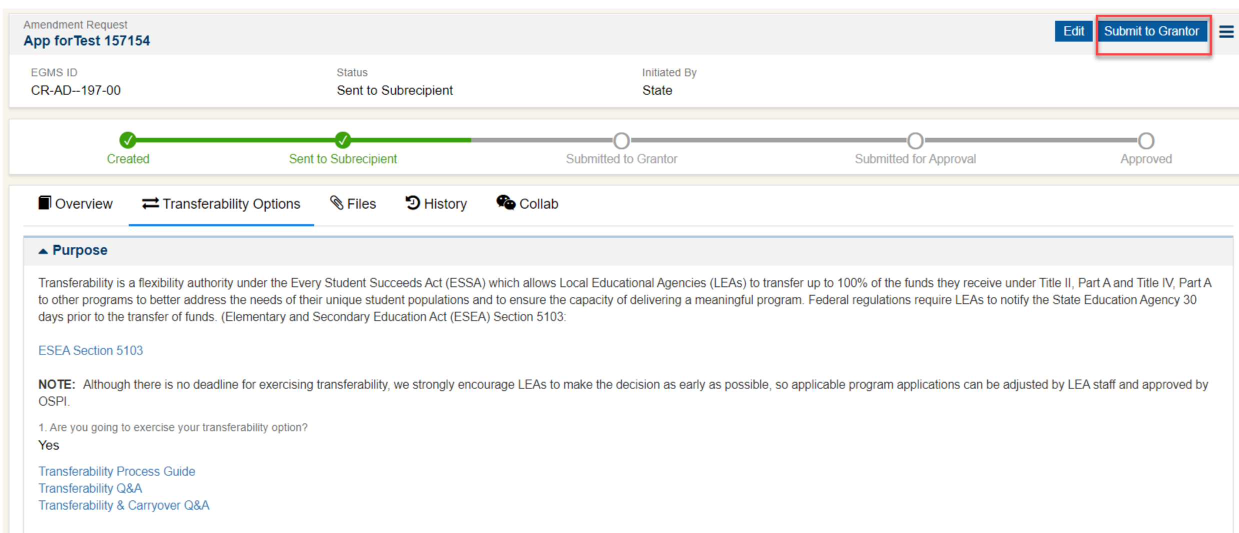


Figure 1846: Submit to Grantor

11 MONITORING

11.1 PROGRESS REPORTS

A Progress Report is a periodic report submitted by the Recipient describing the status, accomplishments, and issues of the Project. The grantor will define the frequency of the Progress Report during subaward creation.

11.1.1 COMPLETING A PROGRESS REPORT

Login to the EGMS Grants portal. Click on the **Monitoring** module and click the '**Pending Tasks'** link under **My Tasks** in the left-hand navigation menu. On the Pending Tasks page, locate the Progress Report within the **Pending Tasks (Assigned to Me)** table and click the **Start** (▶) icon under the **Actions** column.

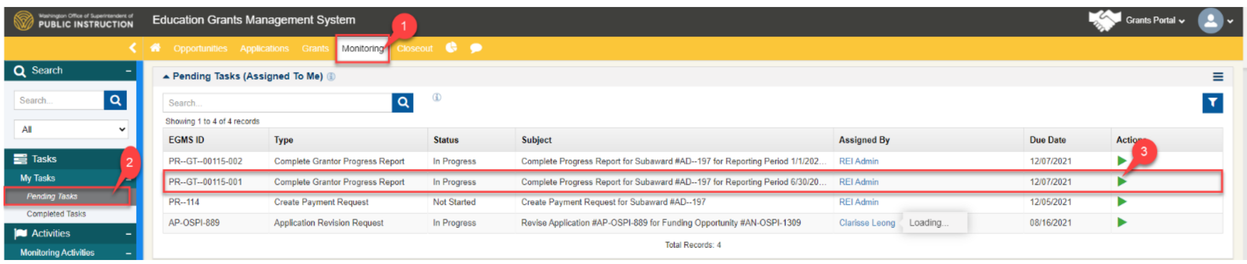


Figure 147: Progress Report Request

The **Report Overview** section within the **Overview** tab displays information such as Reporting Period, Report Due Date, Report Frequency, Progress Report Due Date, Budget Period and Budget Period Number. If this is the Final Report check the **Final Report?** checkbox.

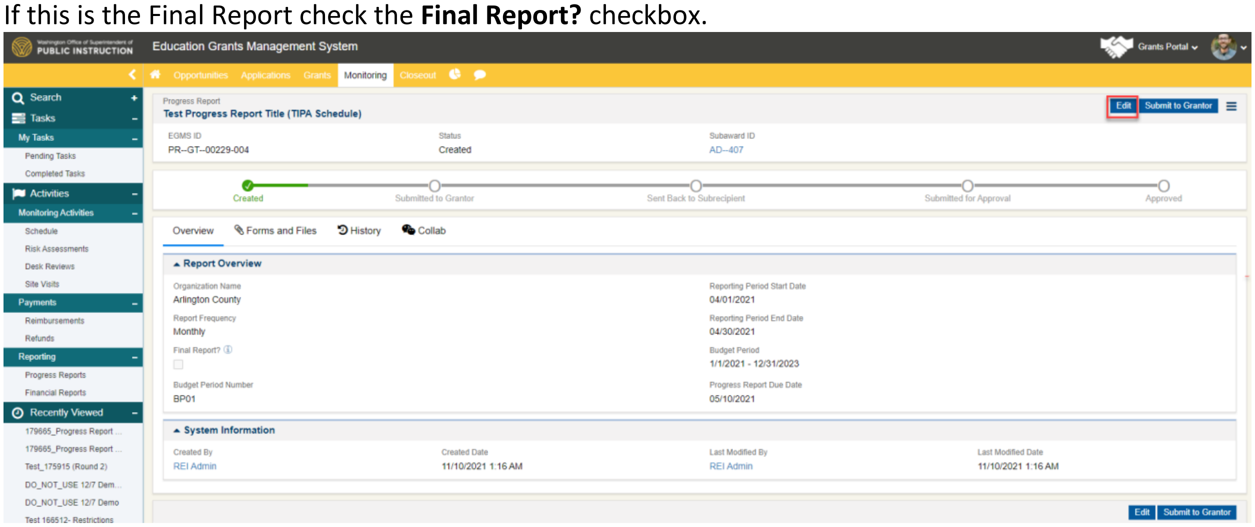


Figure 148: Editing a Progress Report

Navigate to **Forms and Files** tab. Under the **All Form** section, click on edit action to fill the form details.

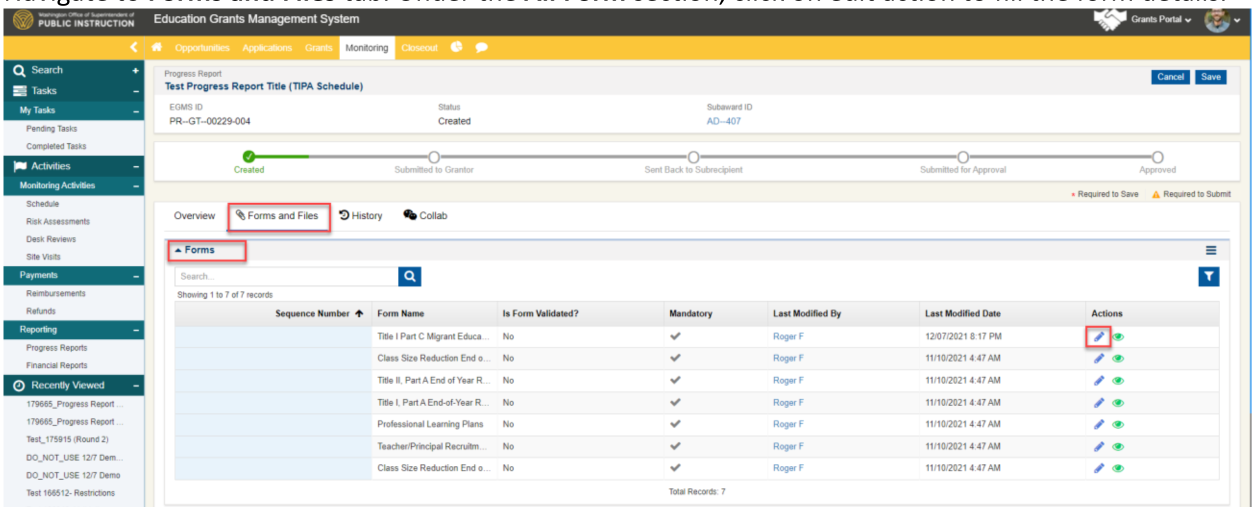


Figure 149: Editing a Progress Report – Edit Form

In the **Files** or **Notes** section, you can attach by clicking on **Add** button in the respective section.

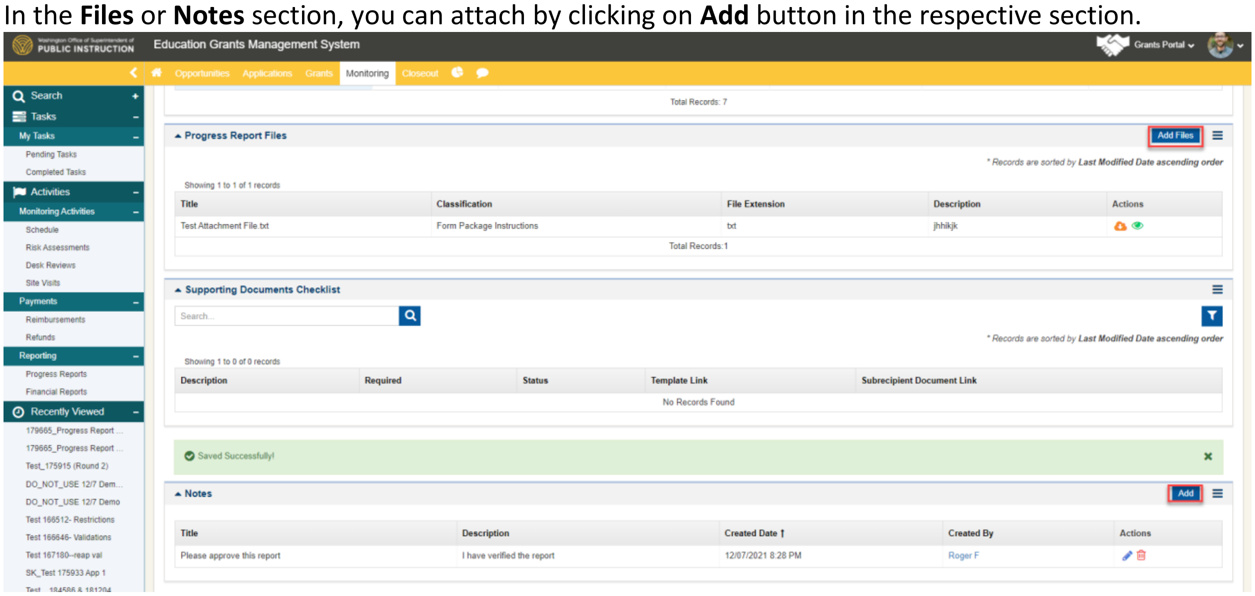


Figure 150: Editing a Progress Report- Add Files or Notes

Once all the details are filled, click on the **Submit to Grantor** button at the top right side of the screen. The status of the Progress report is now updated to "Submitted to Grantor".

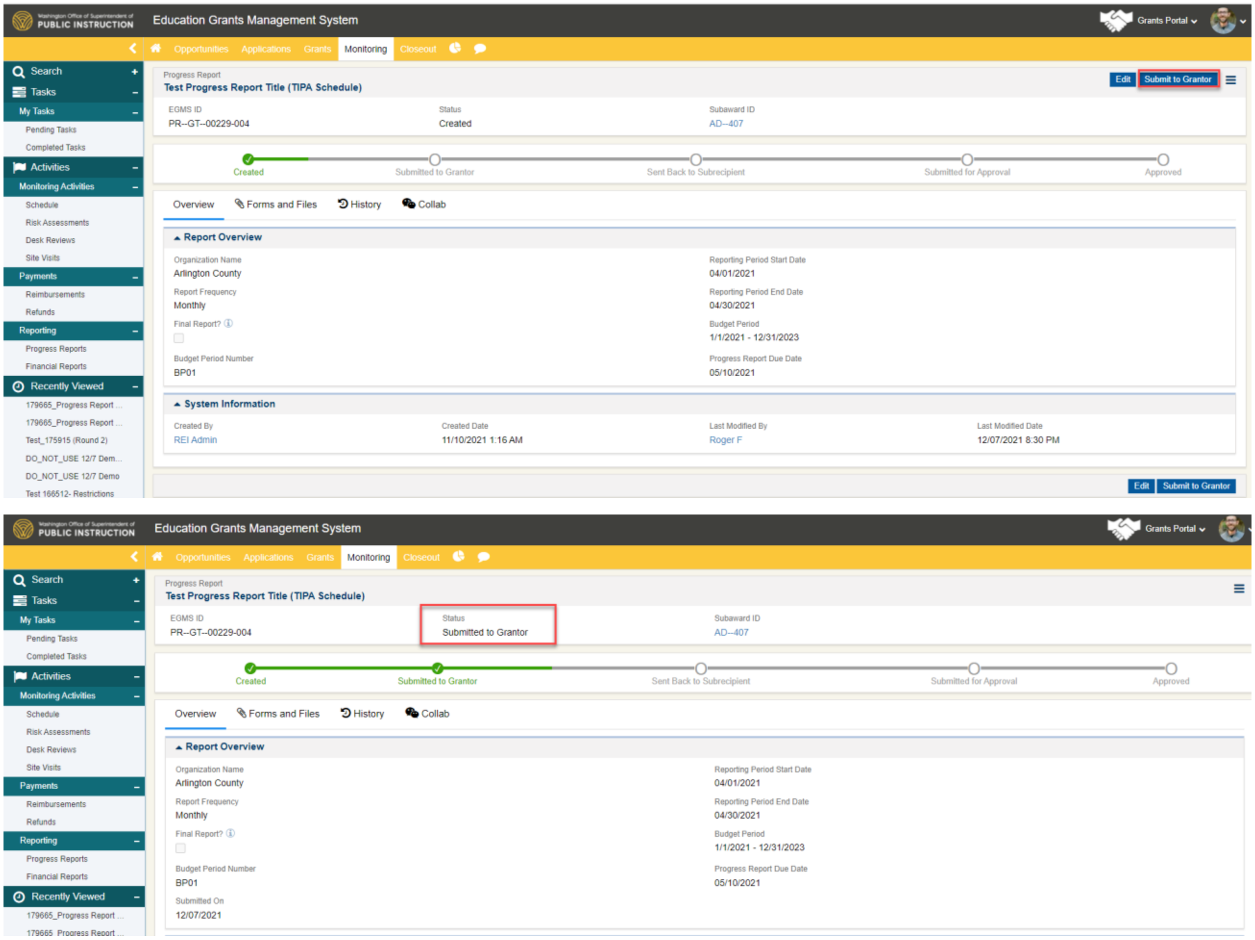


Figure 151: Submitting Progress Report to Grantor

11.2 PAYMENT REQUEST

A deliverable to submit a Payment Requests is created at a frequency that is defined by the grantor. Payment Requests allows Recipients to draw-down on awarded funds as a Reimbursement or Advance within the EGMS. Before submitting a Payment Request, you will have received an award, and you will be within an active Budget Period. A payment request task is created as per the payment request schedule on the award.

11.2.1 SUBMITTING A PAYMENT REQUEST

Login to the EGMS Grants portal. Click on the **Monitoring** module and click the 'Pending Tasks' link under **My Tasks** in the left-hand navigation menu. On the Pending Tasks page, locate the Payment Request within the **Pending Tasks (Assigned to Me)** table and click the **Start** ( ) icon under the **Actions** column.

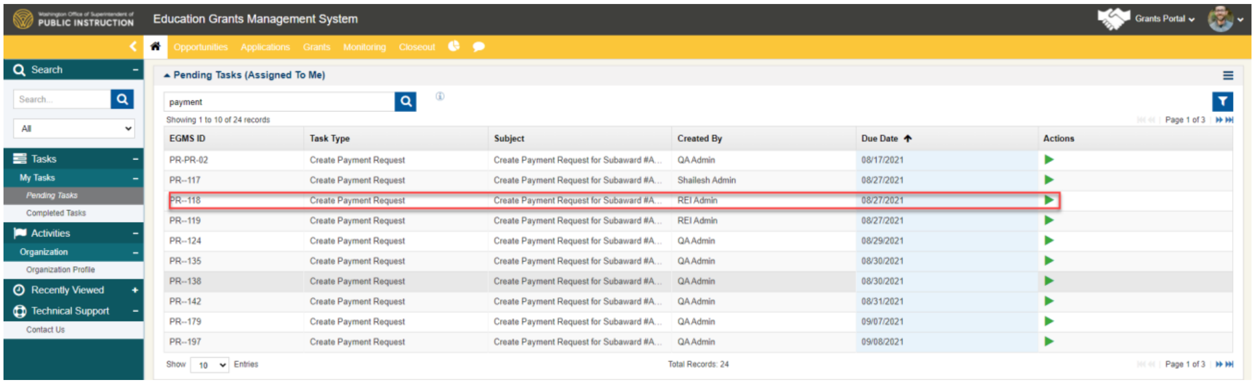


Figure 152: Initiating a Payment Request

Click the **Edit** button in the top-right of the page. This will put the payment request in edit mode so that you can edit the information.

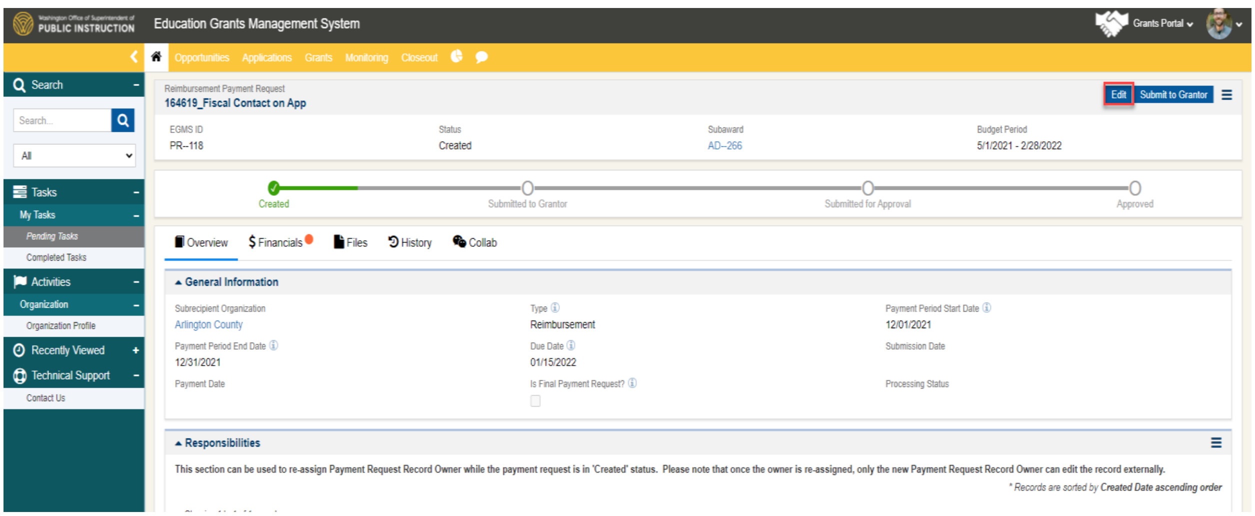


Figure 153: Edit mode

Add the required details in the General Information section under the Overview tab on the Payment Request page.

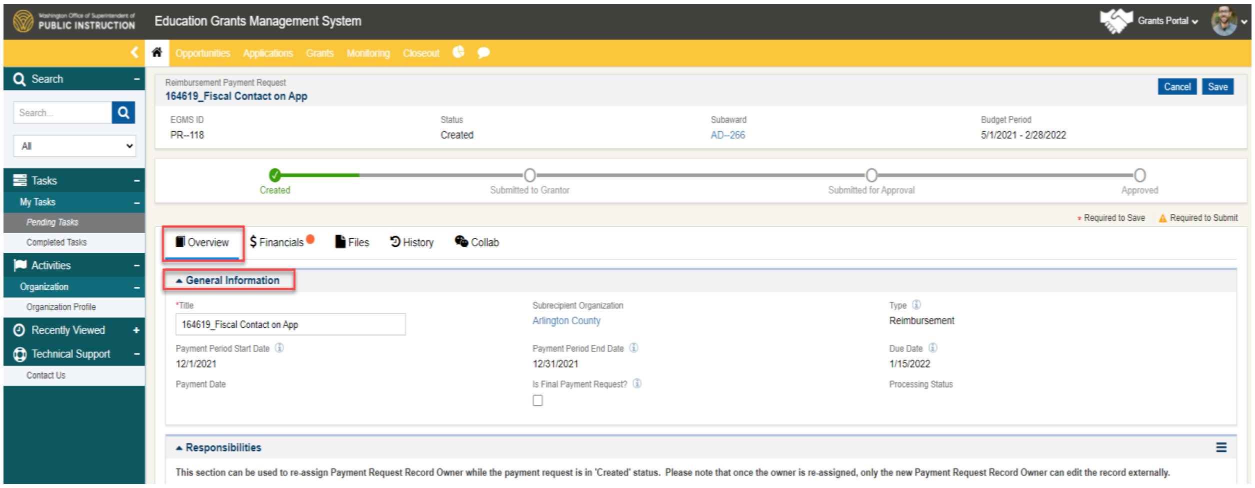


Figure 154: Overview Tab

- If this is your organization's final Payment Request, click the Is Final Payment Request? checkbox.

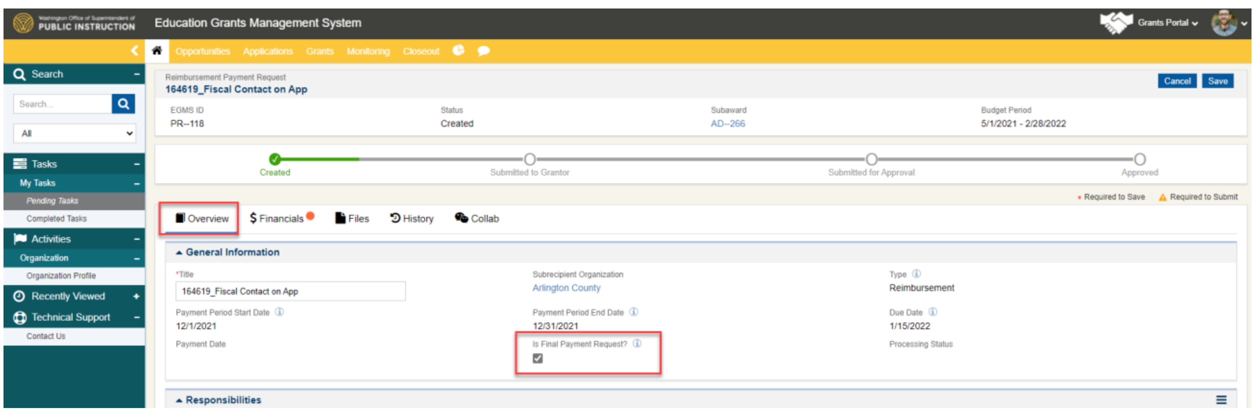


Figure 155: Final Payment Checkbox

Scroll down to the **Responsibilities** section to change the **Owner**. Click on the Edit icon and select any external user for that organization as an owner. This section can be used to re-assign the Payment Request Record Owner while the payment request is in **Created status**. Please note that only the new Payment Request Record Owner can edit the record externally once the Owner is re-assigned.

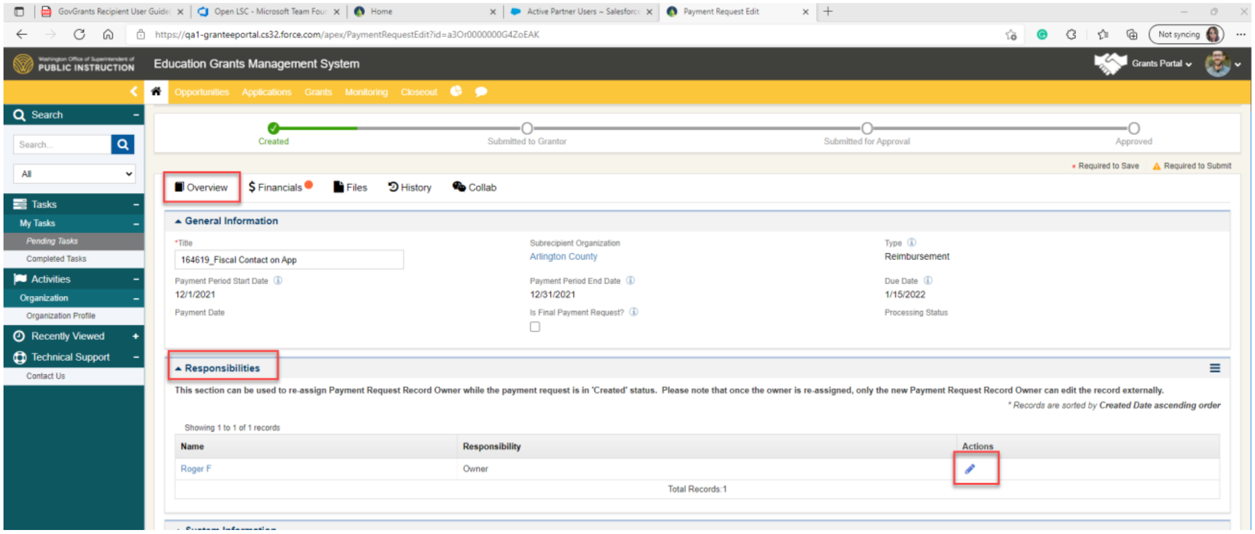
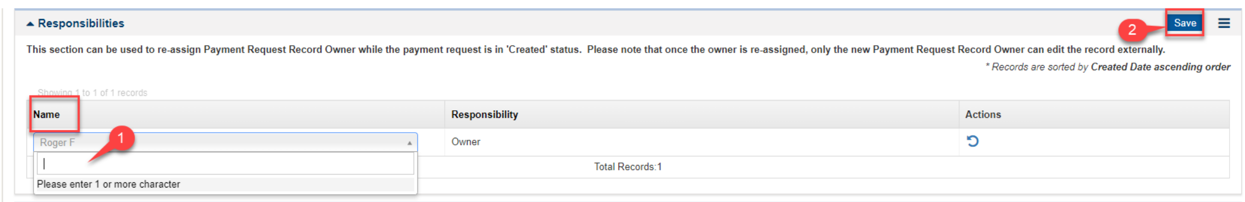


Figure 156: Responsibilities

Once you choose any of the external Users, then click on **Save**. PR--118



Navigate to the Financial tab. For an award without Allocations by Focus Area on the Announcement, you can add an indirect claim amount in the **Indirect Expenditures Requested** field on the **Payment Request Summary** section.

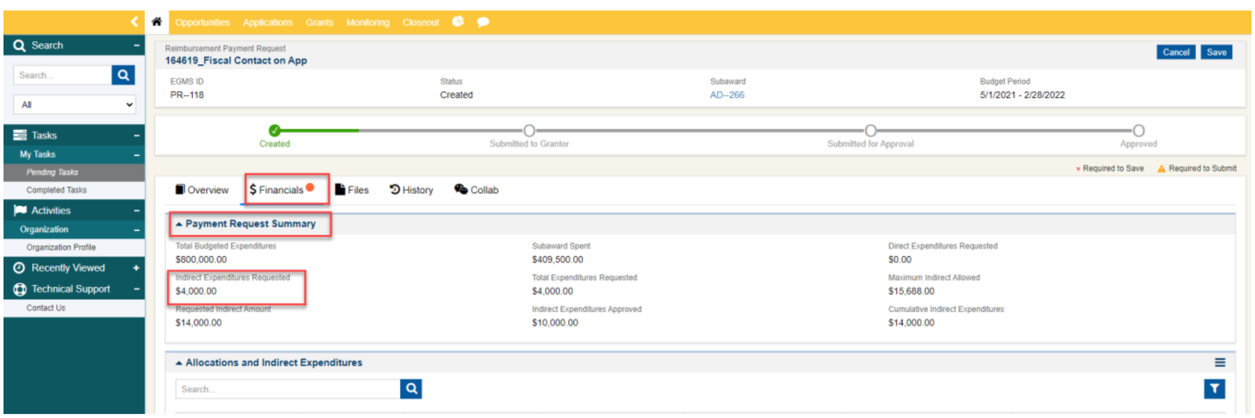
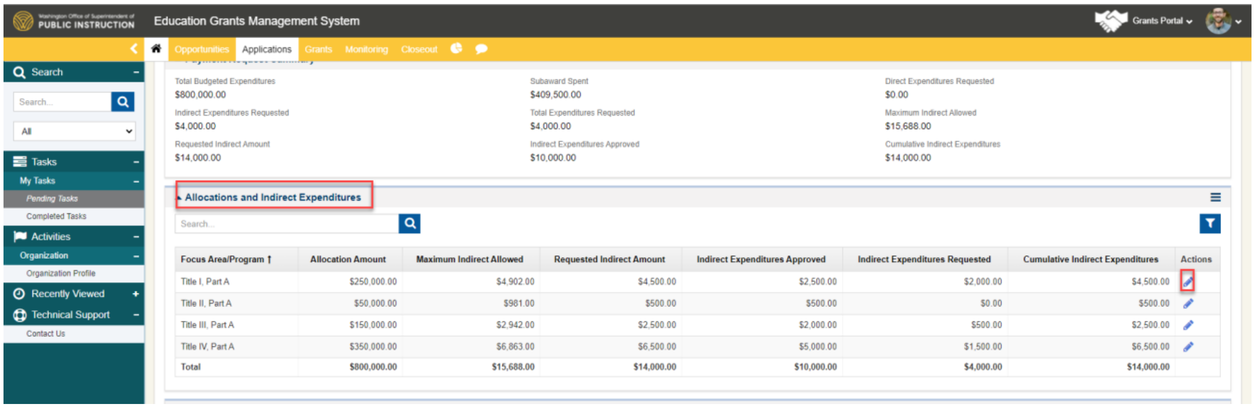


Figure 157: Indirect Expenditures Requested

For an award with Allocations by Focus Area on the Announcement, you can add an indirect claim amount in the **Indirect Expenditures Requested** column on the **Allocations and Indirect Expenditures section**. Click on the **Edit** (Pencil) icon to enter the Indirect Expenditures, click **Save**.



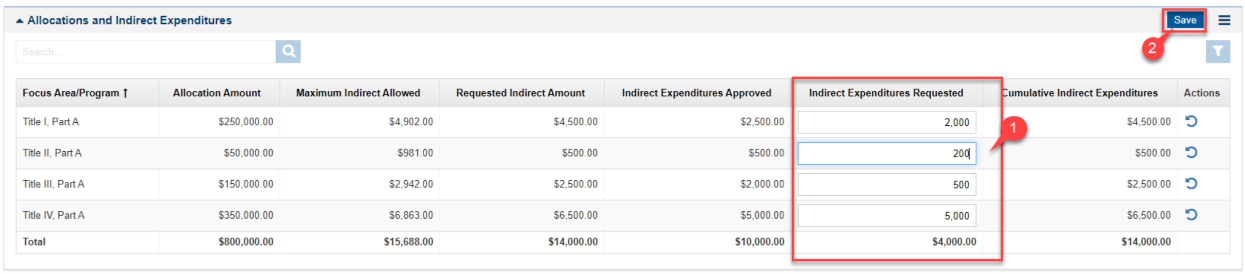


Figure 158: Allocations and Indirect Expenditures

Within the **Financials** tab, navigate to the **Payment Request Budget** section. The section lists the Budget Categories and the awarded amount that is allocated to each Budget Category. Locate the Budget Category you want to request funds and click the **Pencil** () icon under the **Action** column.

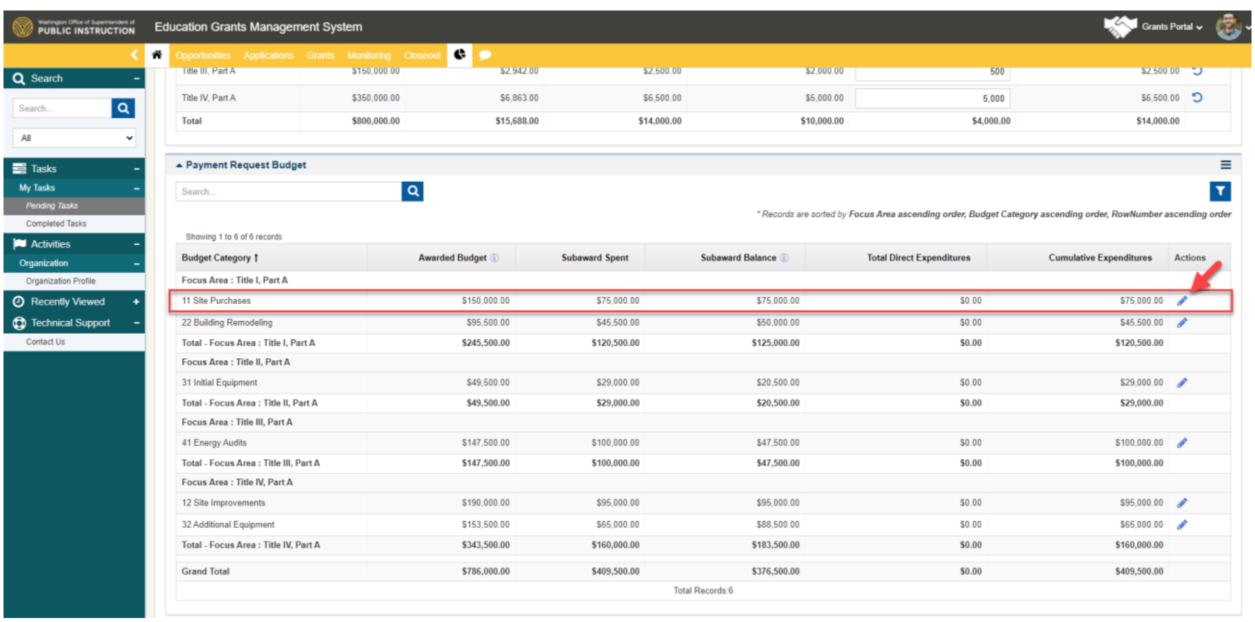


Figure 1959: Payment Request Budget

For **General Fund** detailed budgets, a modal window opens to enter line-item claim details. Use the **Edit** (pencil) icon to add values. Click on **Add Rows**, if needed.

For **Capital** non- detailed budgets, users enter single lines per budget category.

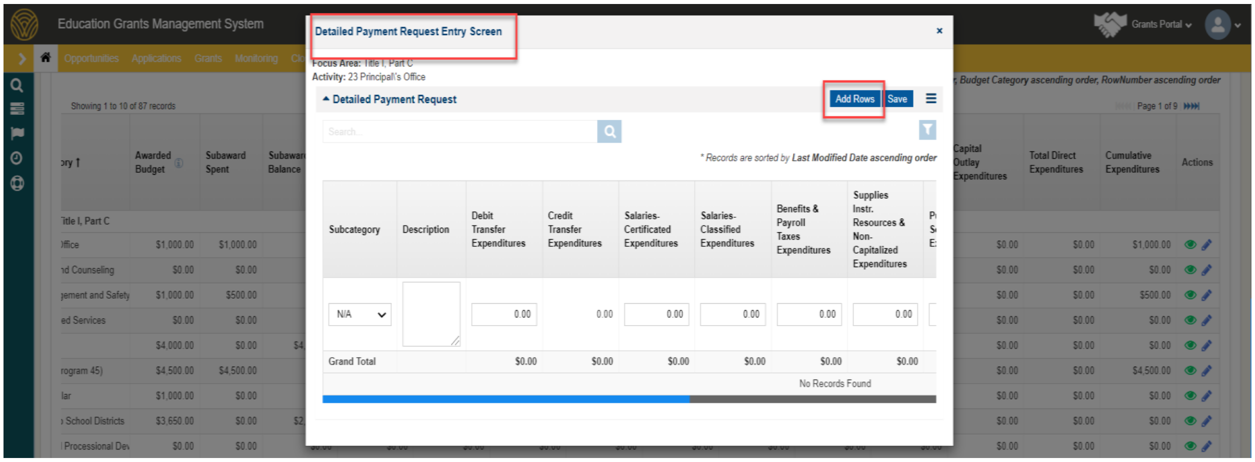


Figure 2060: Payment Request Budget: Add Rows

Under the **Acknowledgement** section, select **I Agree** under the **Acknowledgement** field, then fill out the Signed By field, then click on **Save**.

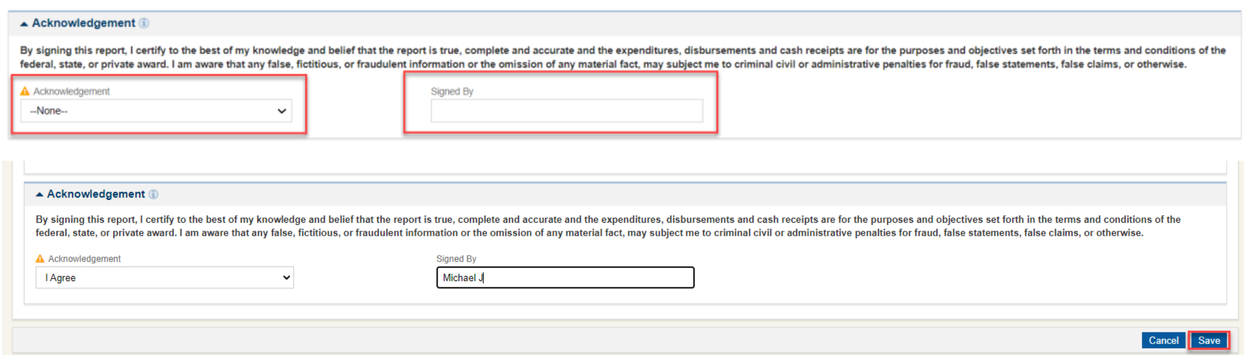


Figure 161: Acknowledgement

As a payment request record owner you can upload an Excel file with the payments, so can easily enter and update payments on the payment request. When you click the **'Download in Excel'** action, the downloaded Excel shows all records already entered in the payment request budget section. Also, downloaded Excel shows only the columns which are shown in the payment request budget section.

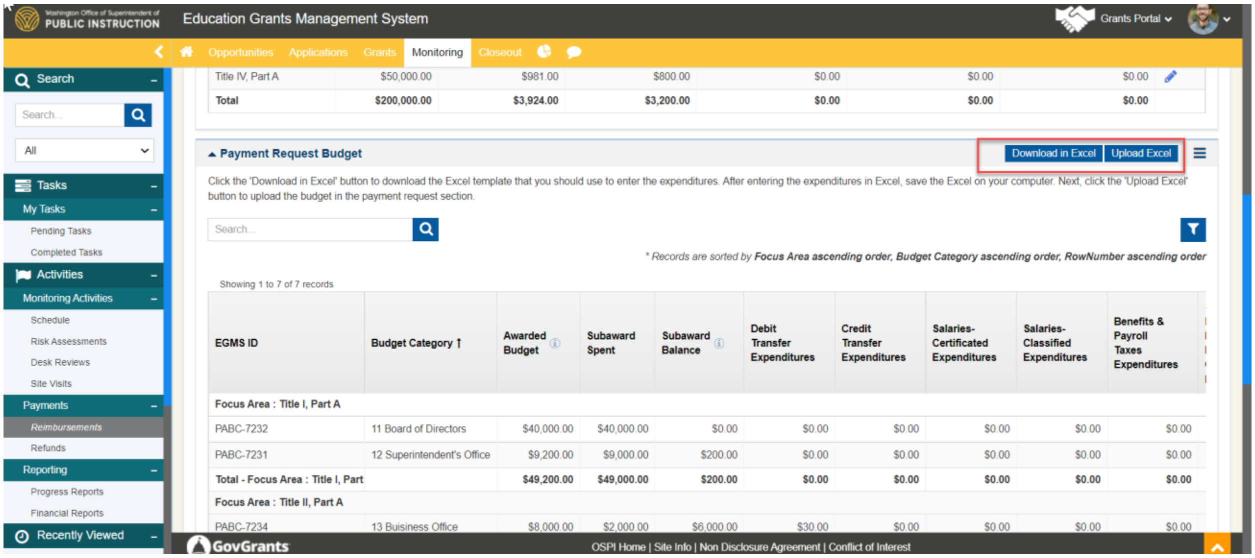


Figure 162: Download in Excel

Enter the payments in the downloaded template and ckick on **Save**. Click on "**Upload Excel**" to upload Payments. Locate your file and click the "Upload" button. The Excel details will be populated in the section.

NOTE: For detailed budget 'By Subcategory' or 'By School', do not enter any value or make any changes to the existing value in the 'Reference ID' column in the downloaded excel.

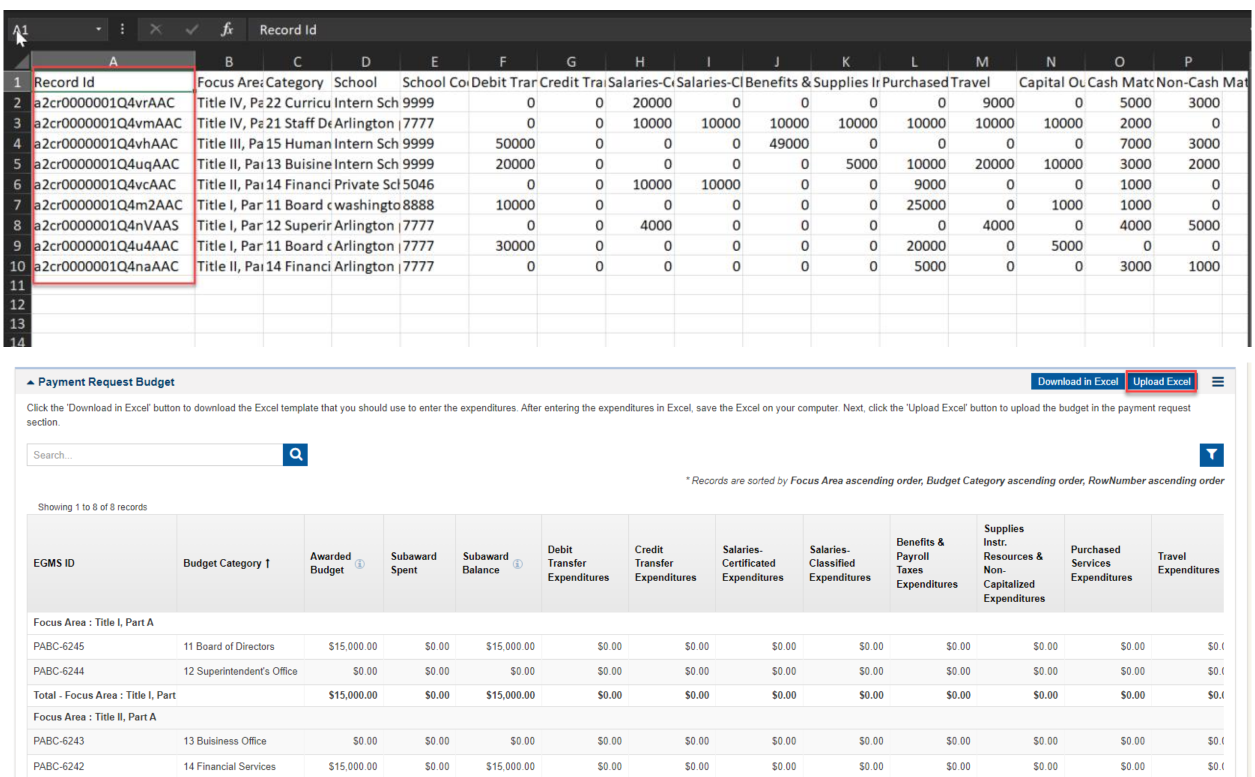
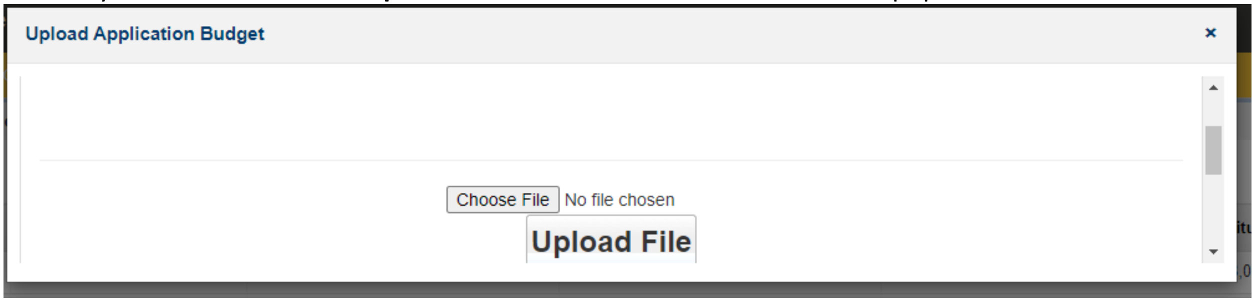


Figure 163: Upload Excel

Choose your File and click the **Upload File** button. The Excel details will be populated in the section



Notes:

- You cannot upload an Excel with more than one row with the same combination of Focus Area and Budget Category more than once for General Budget with Detailed Budget as ‘N/A’ or for Capital Budget.
- You cannot upload an Excel with more than one row of Focus Area/Budget Category/School Code combination multiple times.

Within the **Files** tab, you can add supporting attachments such as an invoice or receipt that is related to the Payment Request. You can also add notes related to the Payment Request within the **Files** tab. To add invoices or receipts navigate to the **Files** section and click the **Add** button. In the **Add Files** popup window, you have the option to upload an attachment from your computer or a previously uploaded file from your workspace.

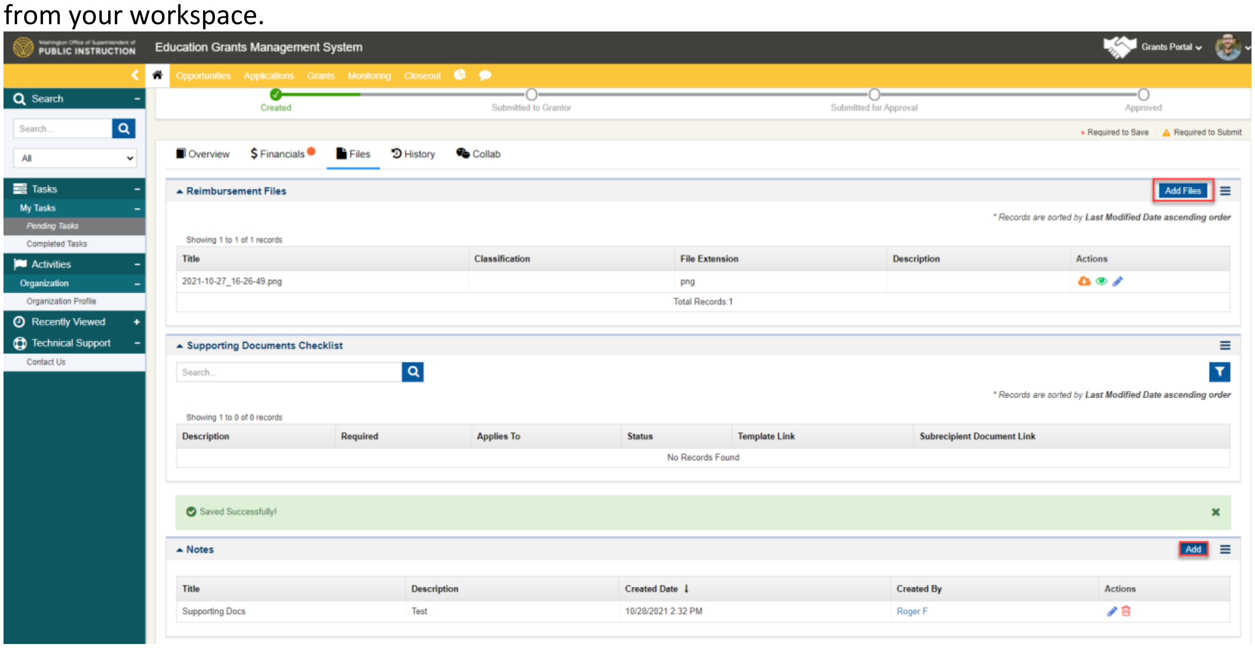


Figure 164: Add Attachments/Notes

After making the necessary updates and click on **Save** on the top right corner of the page.

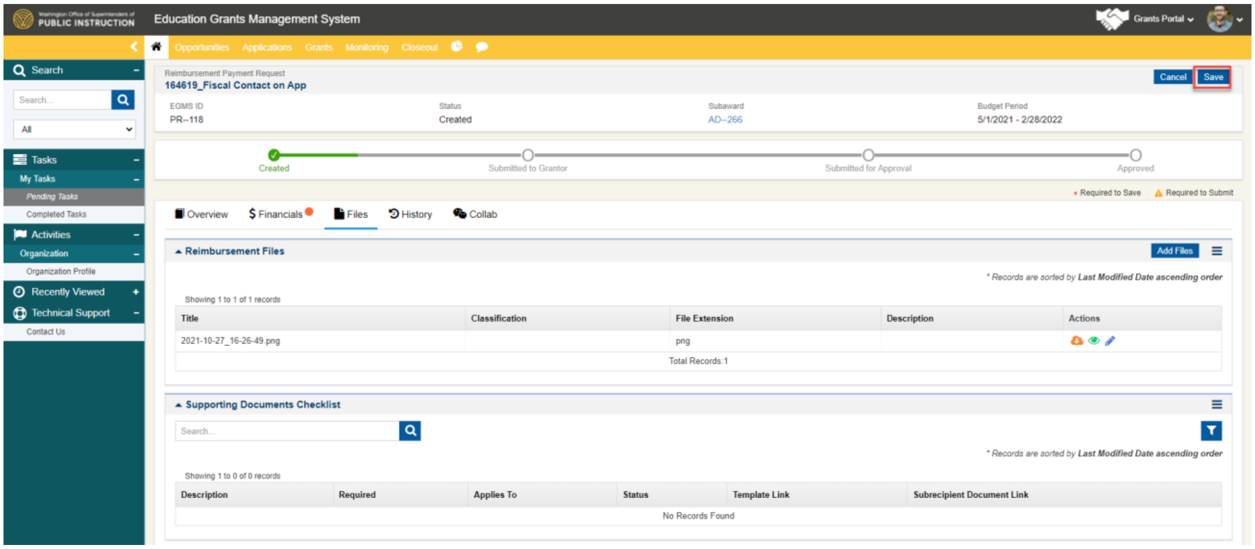


Figure 165: Save

Once you have entered the required and additional information in the Payment Request, click the **Submit to Grantor** button.

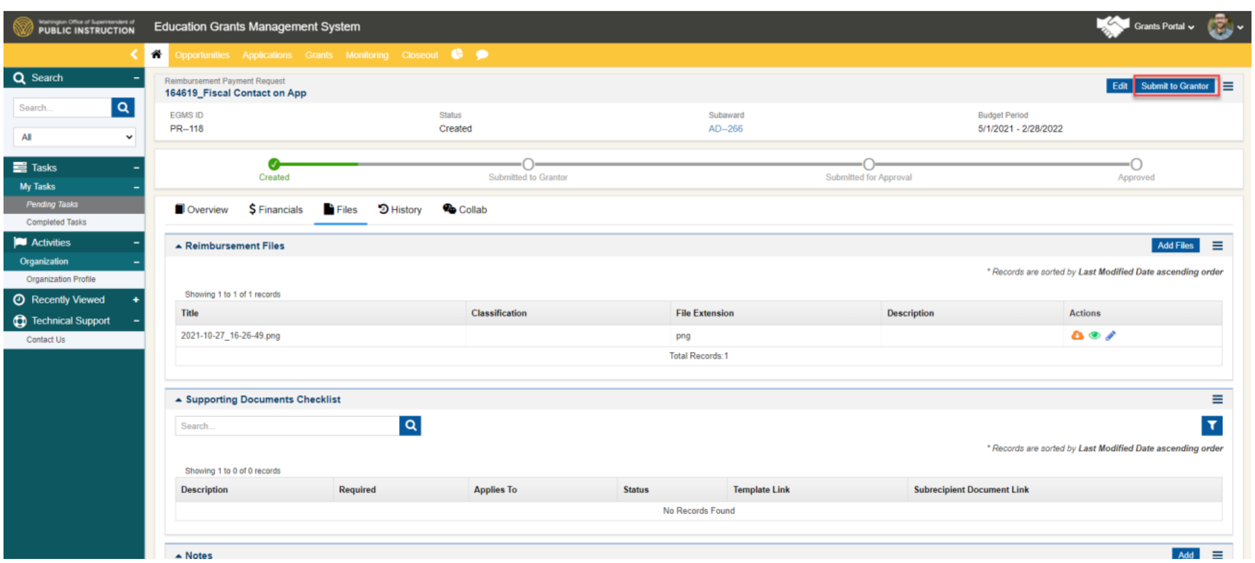


Figure 166: Submitting the Payment Request to Grantor

The status of the Payment Request is now updated to **Submitted to Grantor**.

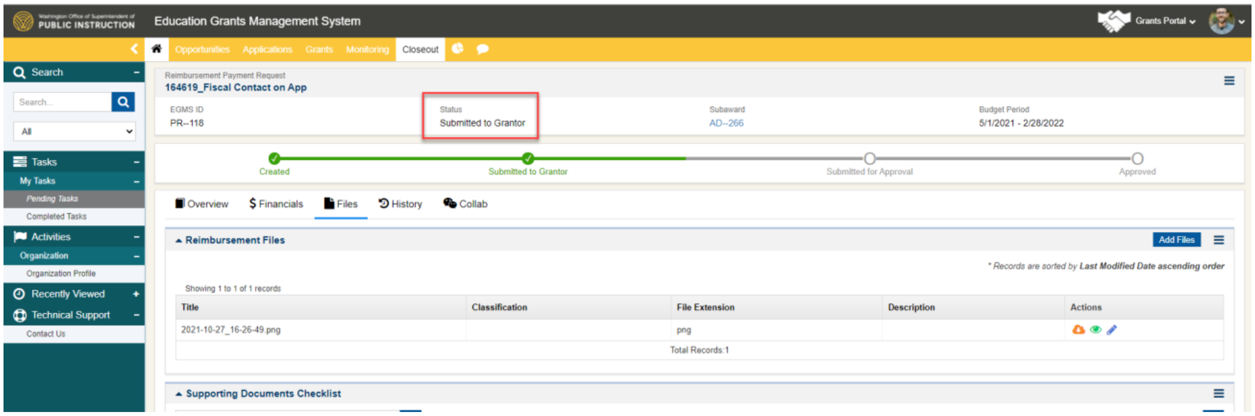


Figure 167: Submitted to Grantor

Note:

- Payment Request cannot be submitted after the due date. The pending task would be 'Force Closed' if the due date is in the past.
- Payments cannot be submitted if OSPI has restricted submission of payments for a Grant.
- Users can enter negative claim amounts.

12 COLLABORATION (COLLAB)

Collaboration tab allows and tracks the internal communication between the users. This page displays all feeds of logged in user that are either followings, related colleagues, external users, files or their contents.

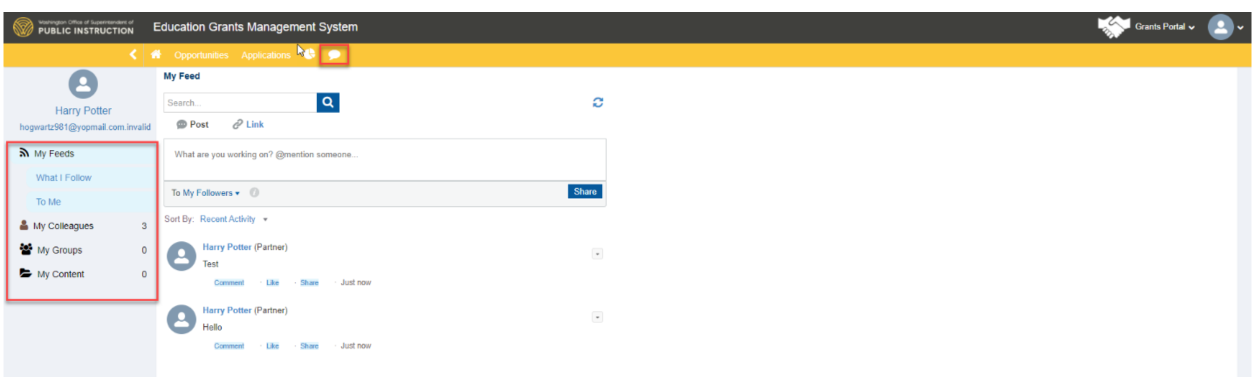


Figure 2168: Collaboration

12.1 MY FEEDS

Users can post their feeds from My Feeds section. To post the feed, enter the post details in the click on Post link or to attach the link, click on Link.

Provide the details in the text area to share. You have the option to select to whom you want to share your post like to followers or to groups. One clicked the Share button; the post will be shared on the page. To tag the user, use @ to mention user.

Followers can comment or like or share the posted feeds by other users.

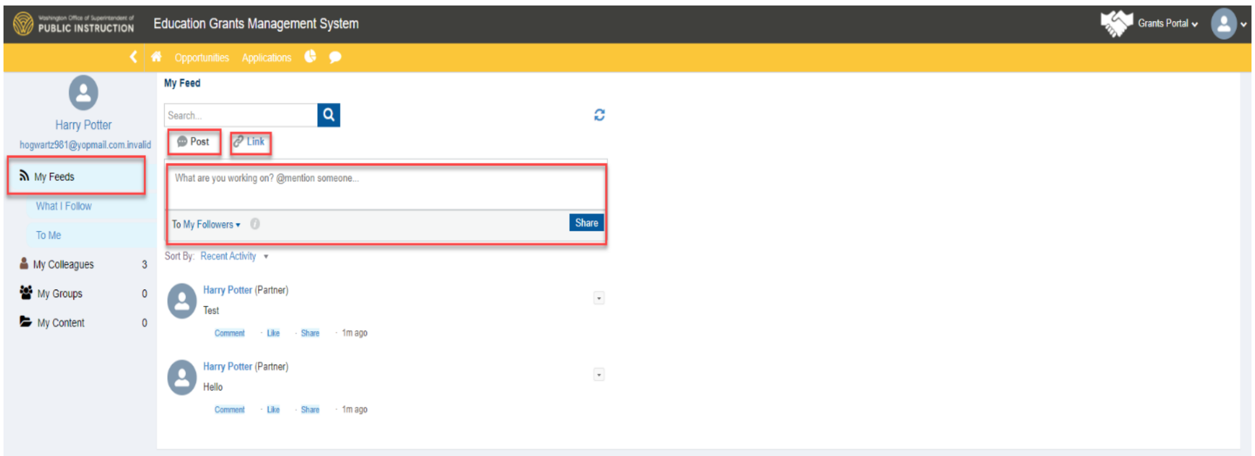


Figure 2269: My Feeds

To remove the post, click on the ' ' in front of the feed.

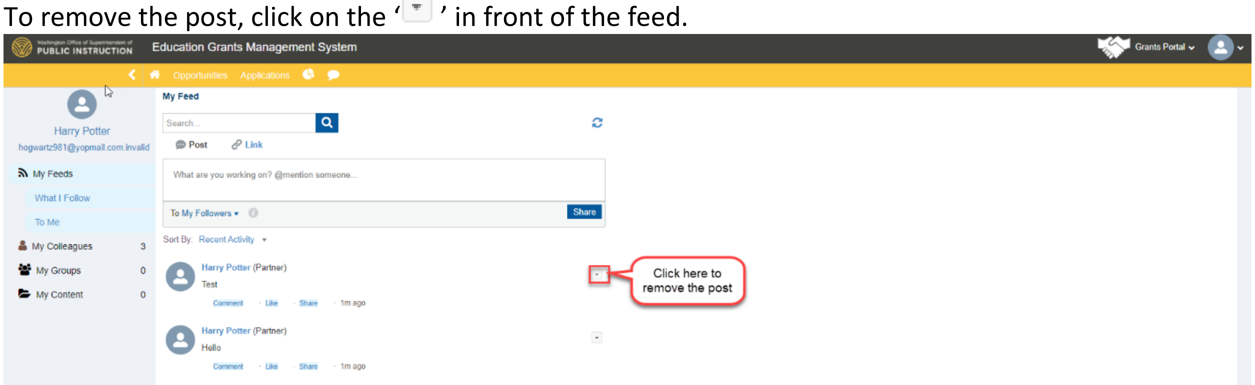


Figure 2370: Posted Feed

To view the tagged feeds, click on the 'To Me' link under **My Feeds** I left navigation panel.

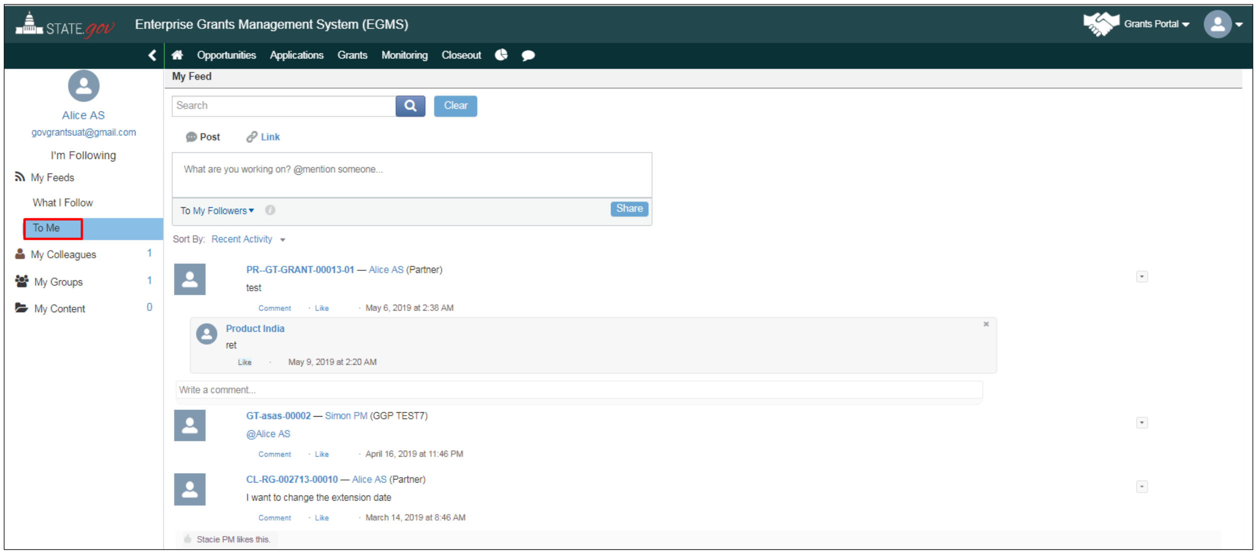


Figure 2471: 'To Me' Feeds

12.2 MY COLLEAGUES

The user can see their colleagues list on the page. To search the colleague from the list, enter his name in the search field. To follow the person, click on the ' ' icon in front of the contact person name.

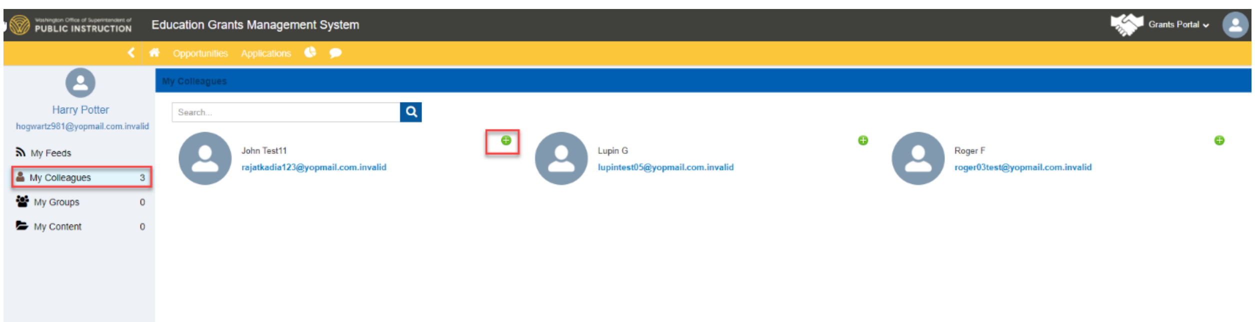


Figure 2572: My Colleagues

Once you started following the person and at a point you feel to unfollow, then click on ' ' icon.

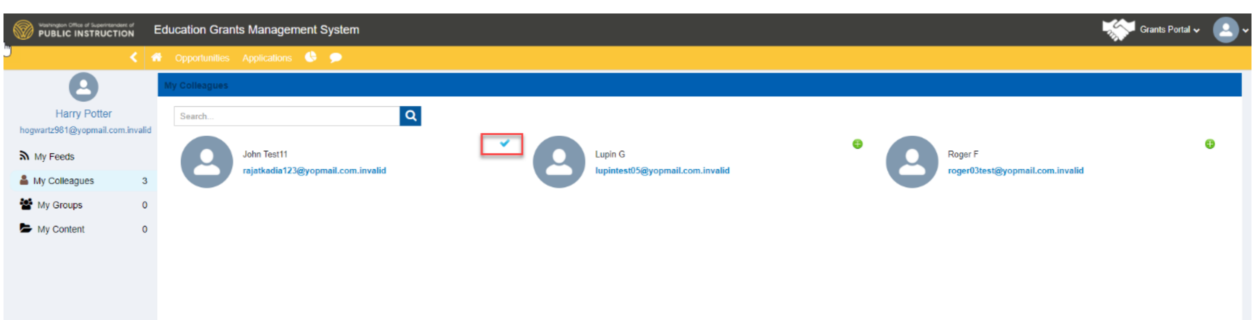


Figure 2673: Unfollow Colleague

12.3 MY GROUPS

All available group details are shown here. This will include member and non-member groups too. You can search for the group using the search field. All group details will be shown with their owner name and number of members.

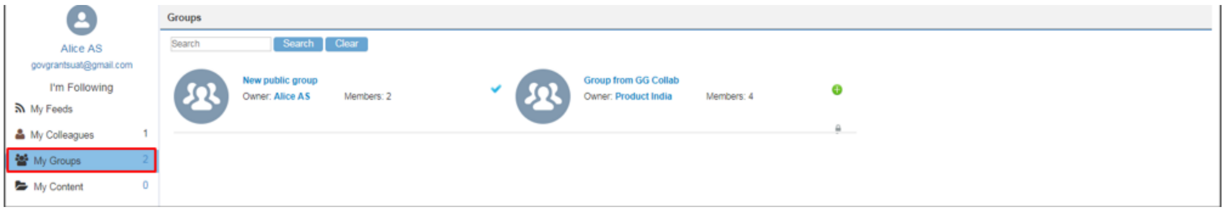


Figure 2774: My Groups

To join the group, click on the ' ' icon in front of the contact person name. Once you have joined the group and whenever you feel to leave the group, then click on ' ' icon.

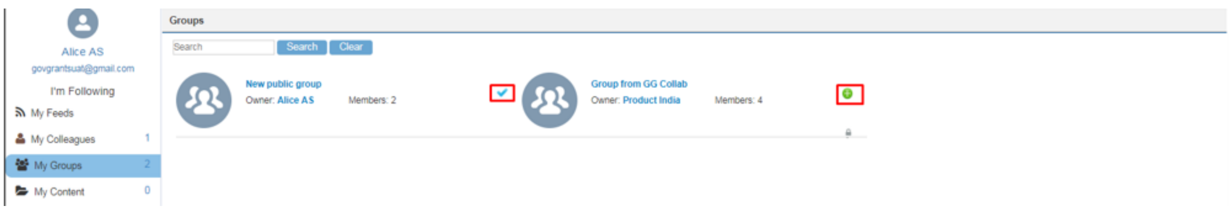


Figure 2875: Join/Leave group

12.4 MY CONTENT

Users can upload their content. To add new content, click on **Add Files** button.

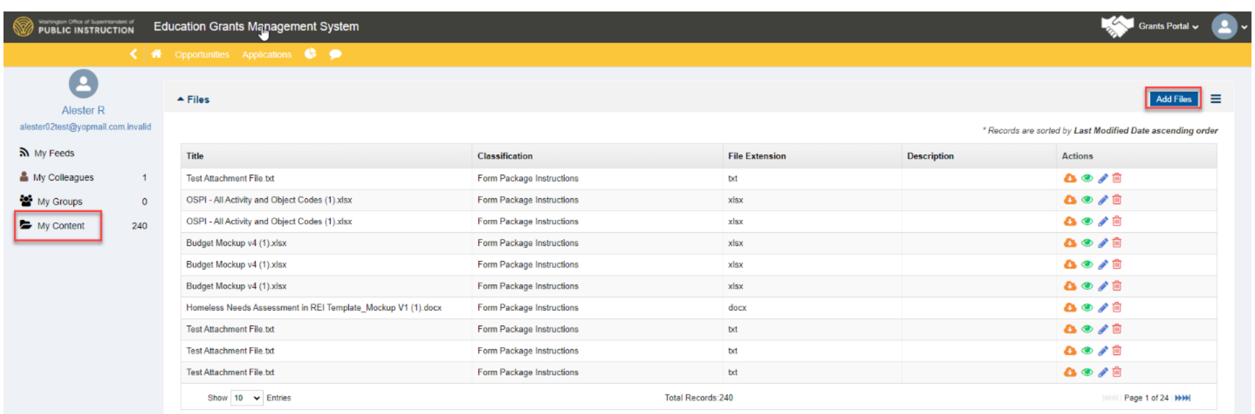


Figure 2976: My Content

To upload the File, click on **Choose a File or Drag** it here then click on **Upload** button on the pop-up window and browse the File.

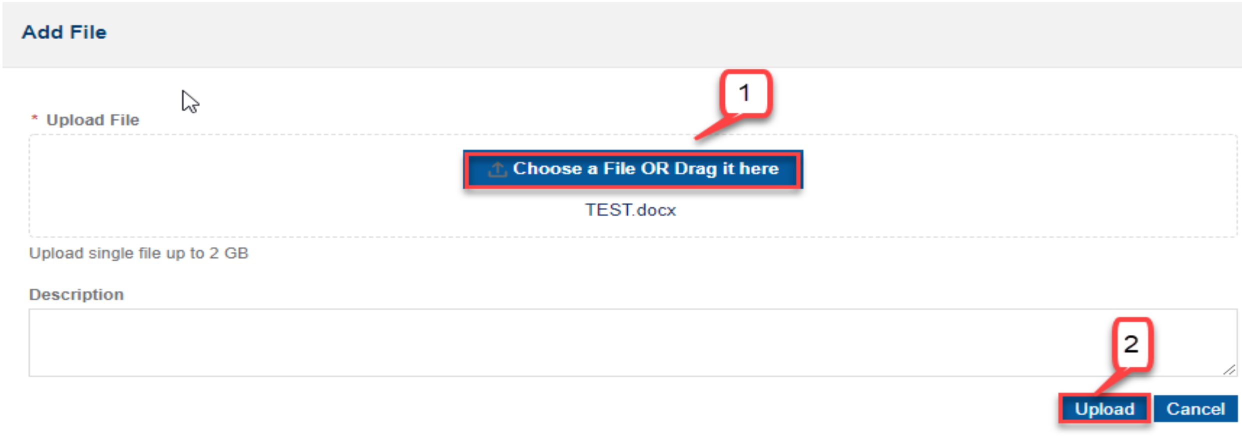


Figure 3077: Upload New File