STANDARD AGREEMENTS
MI E-Grants
GRANTEE TRAINING

Presentation by:
Michigan Department of Health & Human Services
Bureau of Grants and Purchasing
Grants Section

Revised 10/17/2018

MI E-Grants Training Overview

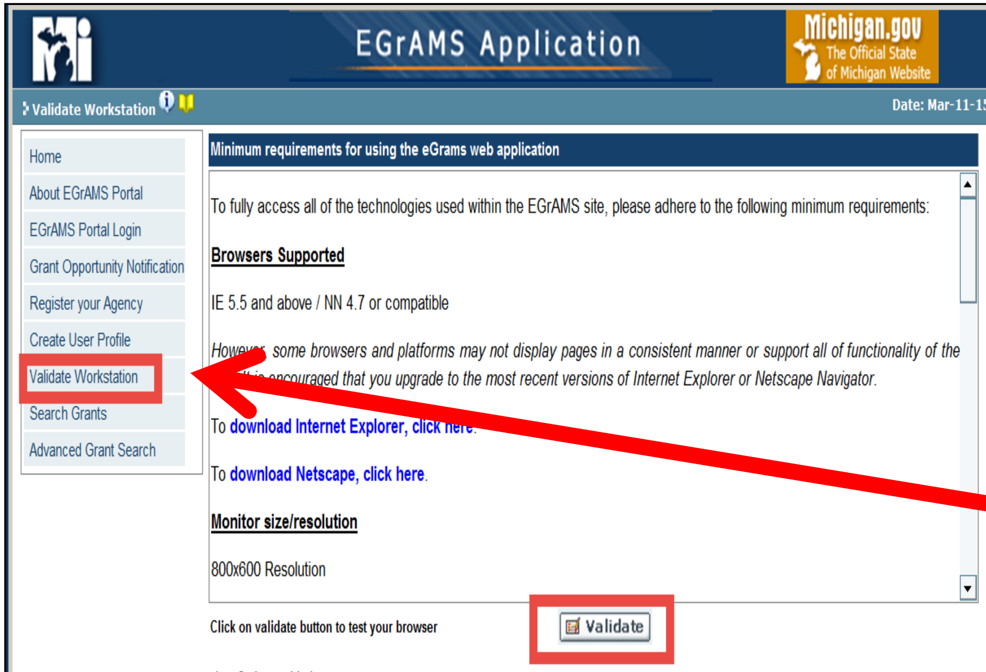
- Getting Started with MI E-Grants
- Navigating with MI E-Grants
- System Security
- Grantee Flow Chart & Application
- Application Submission & Acceptance
- Progress Reports

Getting Started with MI E-Grants

- Becoming a MI E-Grants User
  - Validate Workstation
    - Allowing Pop-ups
  - Creating a User Profile
  - Selecting a Security Question
  - Managing your User Profile
    - Edit/Update your User Profile
    - Change Menu Styles
  - Activation Notification
- Accessing Other Grant Applications via the Portal

Validate Workstation

- Open your **Internet Explorer** browser window.
- Type in the **PORTAL** website URL address: **http://egrams-mi.com/portal**.



- Validating your workstation is a necessary step to ensure that your computer set up is compatible with the MI E-Grants program.
- Microsoft **Internet Explorer** 5.5 and above are supported.
  NOTE: Other web browsers (such as: Google Chrome, FireFox, Safari, etc.) are ***not*** supported.
- Pop-ups must be enabled.
- Select **Validate Workstation** from the 'Left Menu' option.
  - The minimum requirement screen is displayed as shown.
  - Click on the 'Validate' button.
    - The system will refresh the screen and display the results of the validation.

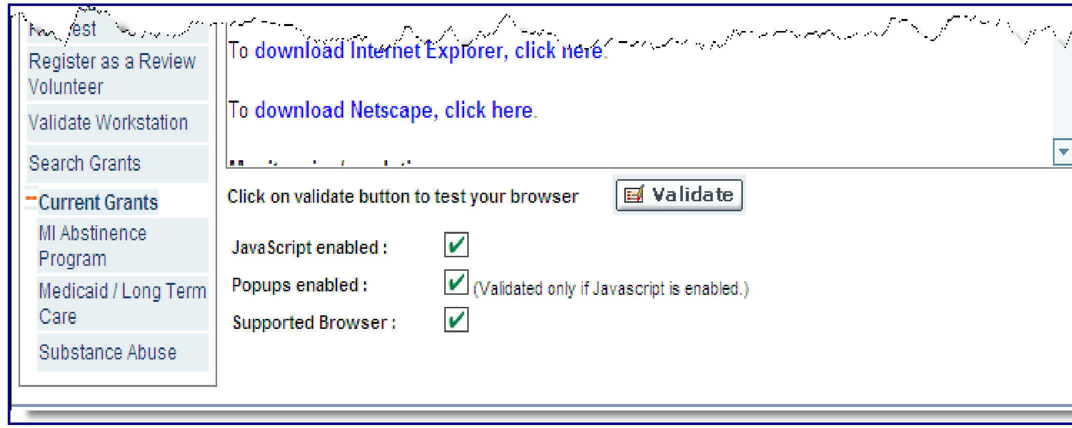
Note: Do NOT contact HTC or the DTMB Helpdesk with MI E-Grants issues. Contact the MI E-Grants Helpdesk: MDHHS-EGrAMS-HELP@michigan.gov or 517-335-3359

Validate Workstation cont'd

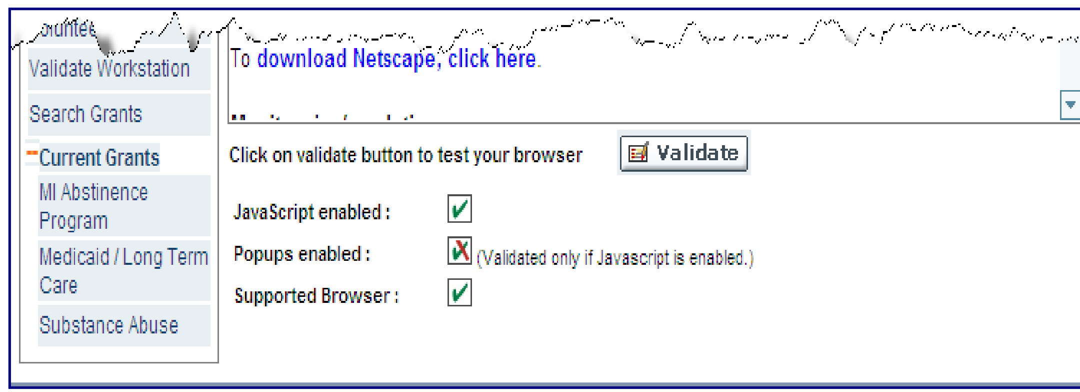
- ***Validation Results:***
  - **Green Checks** – Your computer passes the minimum requirements to use the application.
  - **Red Mark** – Your computer fails the minimum requirements to use the application. Read and follow the instructions provided and then attempt validation again.
- If Pop-ups are being blocked, go to the Internet Explorer ***Tools*** menu, click Internet Options. On the Privacy tab, click Enable Pop-ups.
- If the validation again indicates pop-ups are not enabled, check for a pop-up blocker in a third-party toolbar such as Yahoo! or Google. To do this you may need to get tech support from the IT Department within your Organization.
- For support in validating the workstation, Contact the MI E-Grants Helpdesk:

MDHHS-EGrAMS-HELP@michigan.gov

or 517-335-3359



Passed



Failed

Note: Do NOT contact HTC or the DTMB Helpdesk with MI E-Grants issues.

Allowing Pop-ups

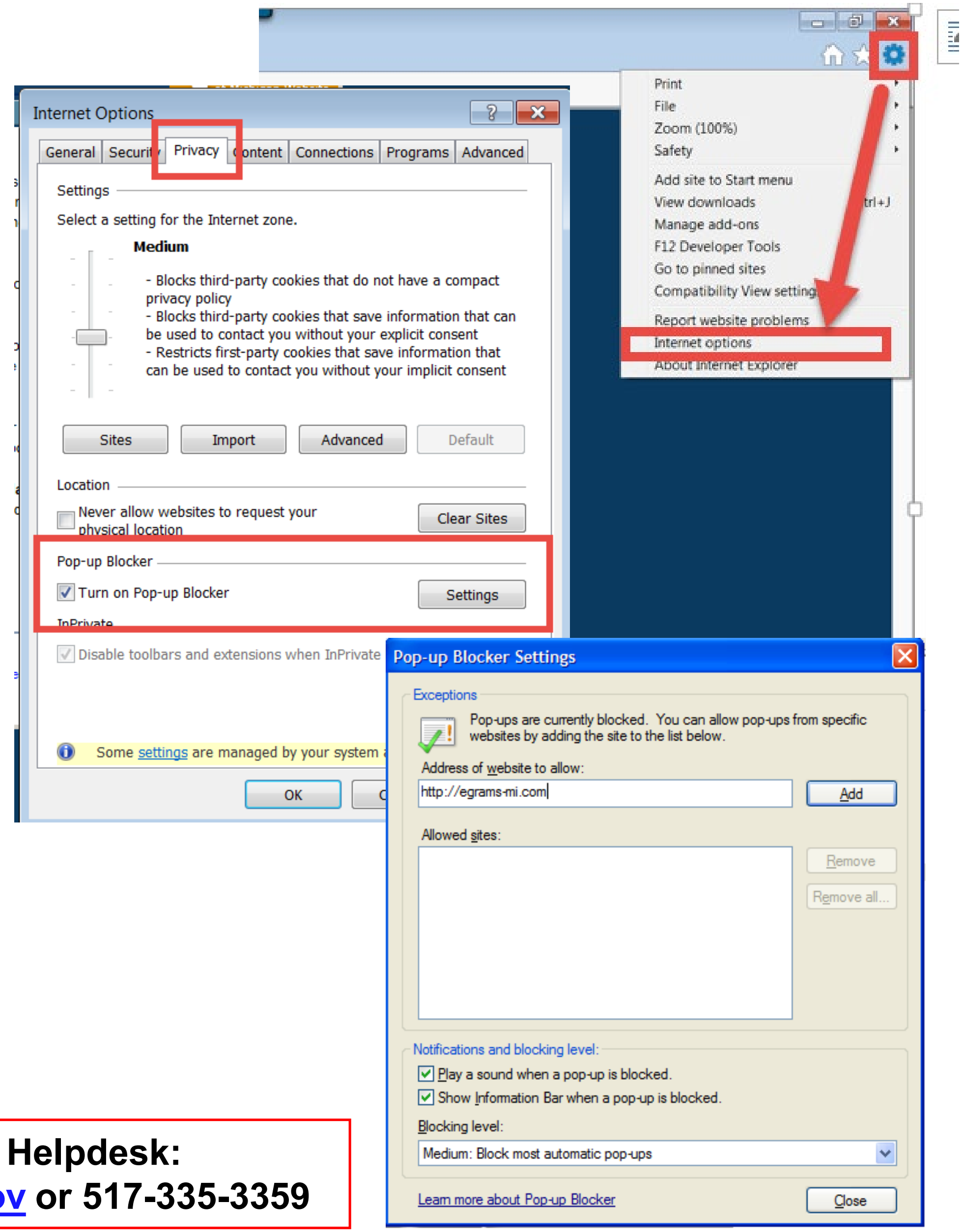
- Pop-ups must be allowed for the MI E-Grants system to operate correctly.
- Check your settings in **Internet Explorer** to assure that pop-ups are allowed while working in the MI E-Grants system.

To turn off the Internet Explorer built-in Pop-up Blocker:

- Click the **Tools** menu and highlight **Internet Options**.
- Move to the right and click **Privacy tab.**
- Confirm this is turned off by confirming the option to Block Pop-ups is <u>unchecked</u>.

The Pop-up Blocker can be configured to remain on, but allow exceptions.

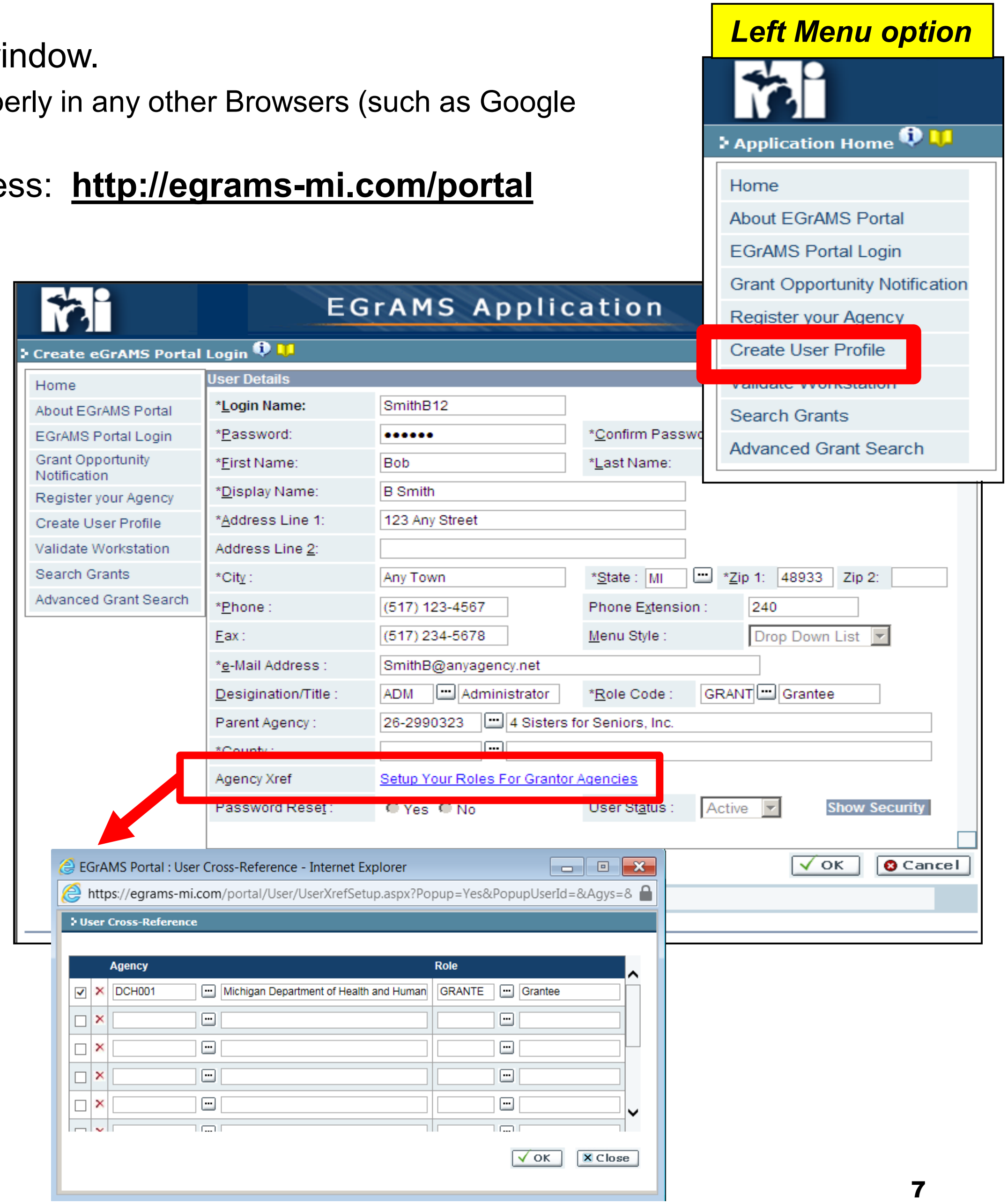
- You can add MI E-Grants to the Allowed sites by clicking **Setup**.
- Key in the website URL address of MI E-Grants: **http://egrams-mi.com**
- Click 'Add'. Pop-ups will now be allowed when running the MI E-Grants system, so it will operate correctly. Click 'Close' button.



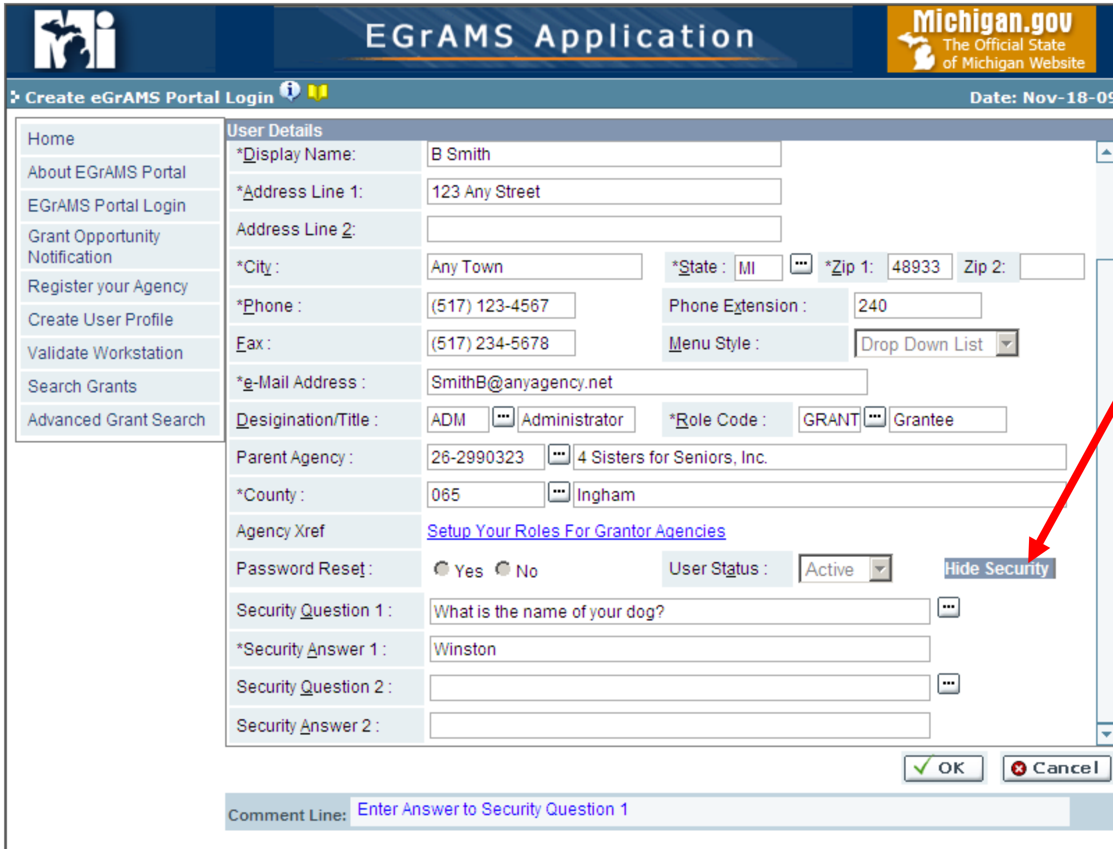
Note: Contact the MI E-Grants Helpdesk: MDHHS-EGrAMS-HELP@michigan.gov or 517-335-3359

How to Create a User Profile:

- Open your **Internet Explorer** browser window.
  - ***NOTE:*** This system does not work properly in any other Browsers (such as Google Chrome, FireFox, Safari, etc.)
- Type in the **PORTAL** website URL address: **http://egrams-mi.com/portal**
- Select 'Create User Profile' hyperlink from the 'Left Menu' option.
- The User Profile screen will be displayed (as shown).
- Enter your information - make sure that you enter information for every textbox/field that has an asterisk ' * '.
- **Role Code:** Select **'Grantee'** only.
- **Parent Agency:** Select your agency name, using the 'Lookup' icon. This is the company/agency you work for.
- **Agency Xref:** Click on 'Setup Your Role for Grantor Agencies' link.
  - A pop-up window displays the User Cross-Reference screen, as shown.
  - Agency: Select '*Department of Health and Human Services*' from the 'Lookup' icon.
  - Role: Select 'Grantee' using the 'Lookup' icon.
  - Click 'OK' to save the information selected in the User Cross-Reference pop-up window. The pop-up window will close. Continue creating the User Profile.



Create a User Profile cont'd



- Click on Show Security 'Show Security' button.
  - The window expands, you may need to scroll down.
  - Make sure that you enter all information that has an asterisk '*'.
  - Select a security question, using the 'Lookup' icon.
  - Enter the respective answer to your selected security question.
  - **NOTE:** Your entry is case sensitive.
- Click the 'OK' button to save your information.
- Click the 'Cancel' button to discard the entry and start over.

- *All Users need a user name and password to access the EGrAMS system.*
- *All Users manage their own password (alphanumeric **only**).*
- *You need to create your User profile only once.*
- ***YOUR USER STATUS WILL BE 'INACTIVE' UNTIL THE "PROJECT DIRECTOR" FROM YOUR AGENCY ACTIVATES THE USER AND ASSIGNS YOU TO A GRANT PROGRAM. Once activated,** the system sends the user an email notifying them their account has been activated. The User can proceed to the login screen to enter the system.*

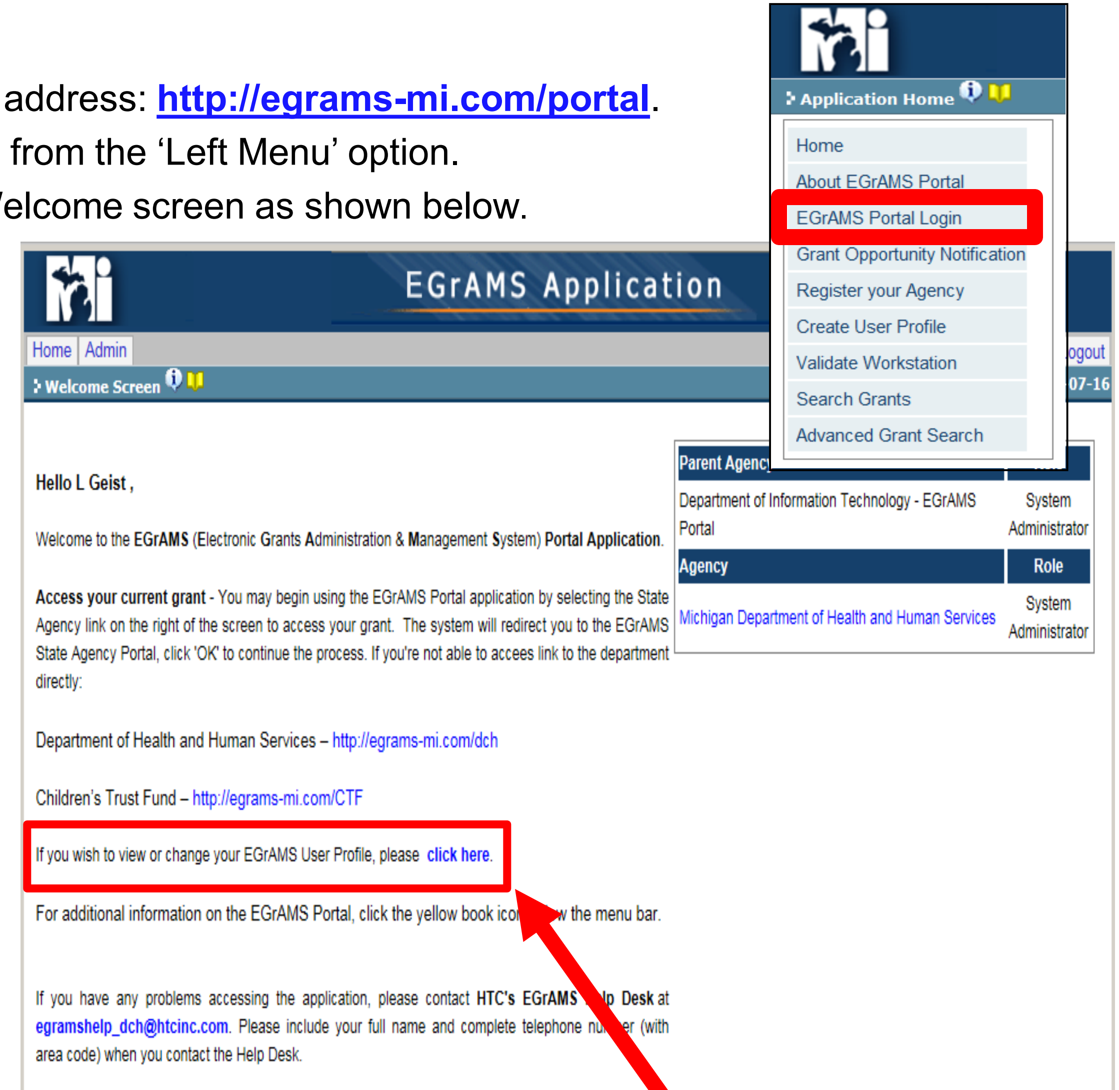
Managing your User Profile

- Type in the **PORTAL** website URL address: http://egrams-mi.com/portal.
  - Select 'EGrAMS Portal Login' from the 'Left Menu' option.
  - The system will display the Welcome screen as shown below.

- To change your user profile information or menu style, click on the 'Click Here' hyperlink on the Welcome screen to edit your User profile information.

- The system displays your User profile information screen.

NOTE: Changes to a User profile can **only** be done on the PORTAL website not on the DCH website.

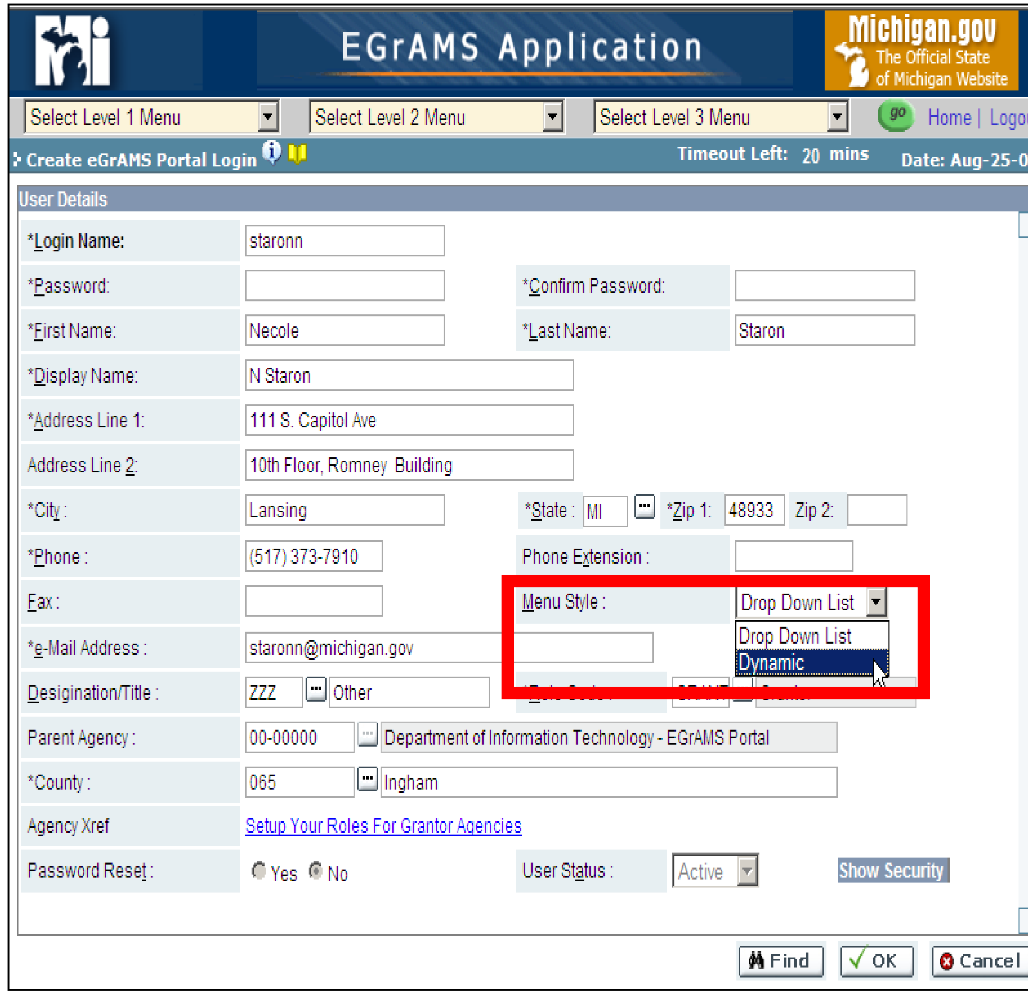


Click to change your user profile information or menu style.

Edit Your user Profile

- Updates to a users profile can **only** be made from the MI E-Grants **PORTAL** website URL: (**http://egrams-mi.com/portal**).

- Edit the desired Profile Information.
  - A user can change:
    - First and Last Name
    - Display Name
    - Address Information
    - Phone Number
    - Fax Number
    - Email Address
    - Security Questions and Answers



- Menu Style:
  - To change the current menu style select the menu style using the dropdown.
    - Drop Down List (default)
    - Dynamic

- Click 'OK' button to save changes.

- Click 'Cancel' button to discard changes.

After creating your User Profile:

- Contact your Agency's "Project Director" to activate your User account within the MI E-Grants System. ***NOTE:*** No "Profile Completion" email will be sent.
- Users do **not** have access to the Grant Application until activated by the Agency's Project Director.
- Once the Project Director has activated the new User's account, a 'Confirmation' email will then be sent directly to the new User via the MI E-Grants System. ***NOTE***: If you lock yourself out of the system (i.e. de-activate your account), the Project Director must re-activate your account.

Email Information Date : May-21-18

From :		Sent :	May-21-18 04:09:39 PM
To :			
Subject :	User Activation for		
Message :			

Dear
Kalamazoo County Health and Community Services Department

Your user profile with user_name has been activated in the Michigan Department of Health and Human Services (MDHHS) portal. You may log into the EGrAMS Application http://egrams-mi.com/dch to review your projects and access the various functions based on your role.

You may change your user information after logging in to EGrAMS. Please note that Role and Parent Agency can only be changed by a MI E-Grants System Administrator.

Technical assistance regarding your user profile should be directed to MI E-Grants Help Desk at (517) 335-3359 or email MDHHS-EGRAMS-HELP@michigan.gov.

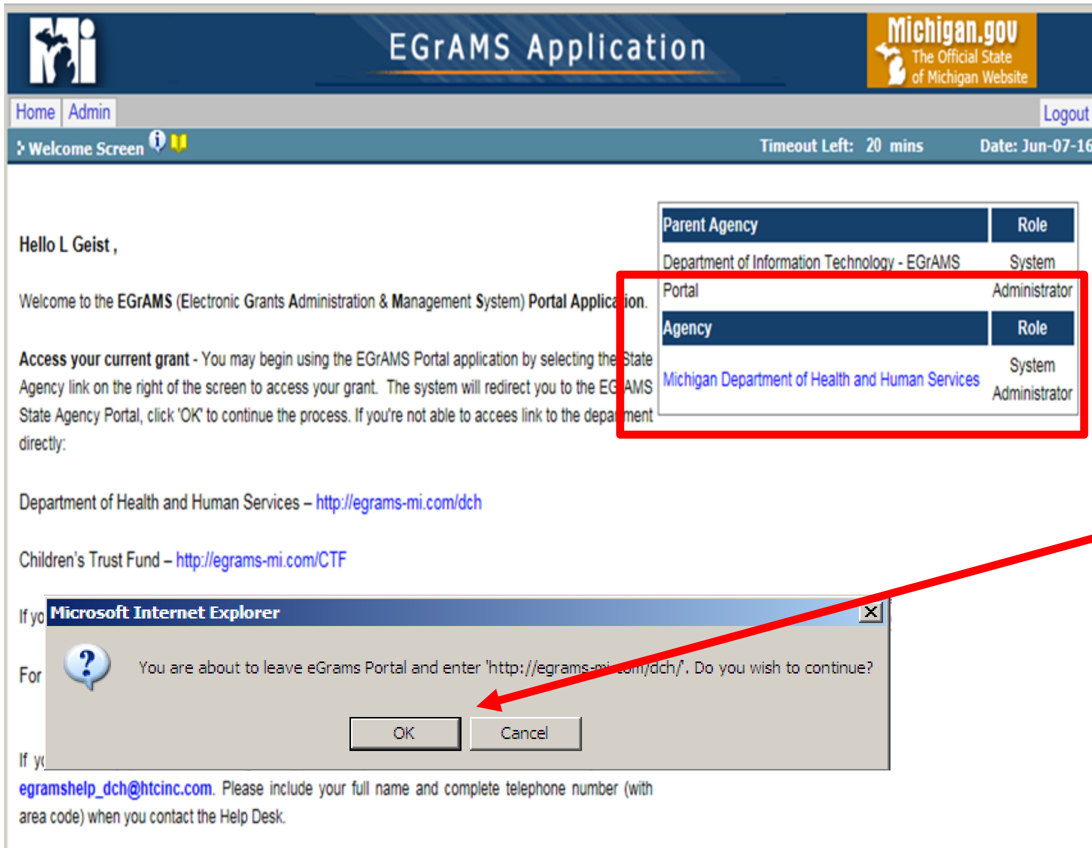
MI E-Grants Administrator

Print | Send Email | Close

Note: Contact the MI E-Grants Helpdesk:
MDHHS-EGrAMS-HELP@michigan.gov or 517-335-3359

Accessing other Program Applications using the MI E-Grants PORTAL website

- The system will display the Welcome screen as shown (view from login at: **http://egrams-mi.com/portal**).



- Click on the appropriate Agency name hyperlink, displayed in the textbox on the right side of the screen.
- The system prompts you with a message, "You are about to leave the eGrams Portal and enter 'http://egrams-mi.com/dch/. Do you wish to continue?"
- Click 'OK' button, on the information message.
- The system will refresh and display the Welcome screen of the Program Application website.*
- If you have any problems, contact the MI E-Grants System Administrator.

****NOTE:*** Depending on your computer settings, this option may not be available to you. In this case, we recommend you use the http://egrams-mi.com/dch website to access the Grant Application.*

Navigating with MI E-Grants

- Left Menu Option Bar
- System Helps
- Obtaining General Grant Program Information
- System Navigation Tools
- Menu Styles
- System Messages
- System Warnings

How to access the MI E-Grants Grant Application:

- Open your **Internet Explorer** browser window.
  - ***NOTE:*** This system does **<u>not</u>** work properly using <u>any other Browers</u> (such as: Google Chrome, FireFox, Safari, etc.)
- Type in the **DCH** website URL address: **<u>http://egrams-mi.com/dch</u>.**

Left Menu options

Header – Browser controls, Application logo; constant for all screens.

Body – Based on the option selected.

Footer – Links; constant for all screens.

System Help

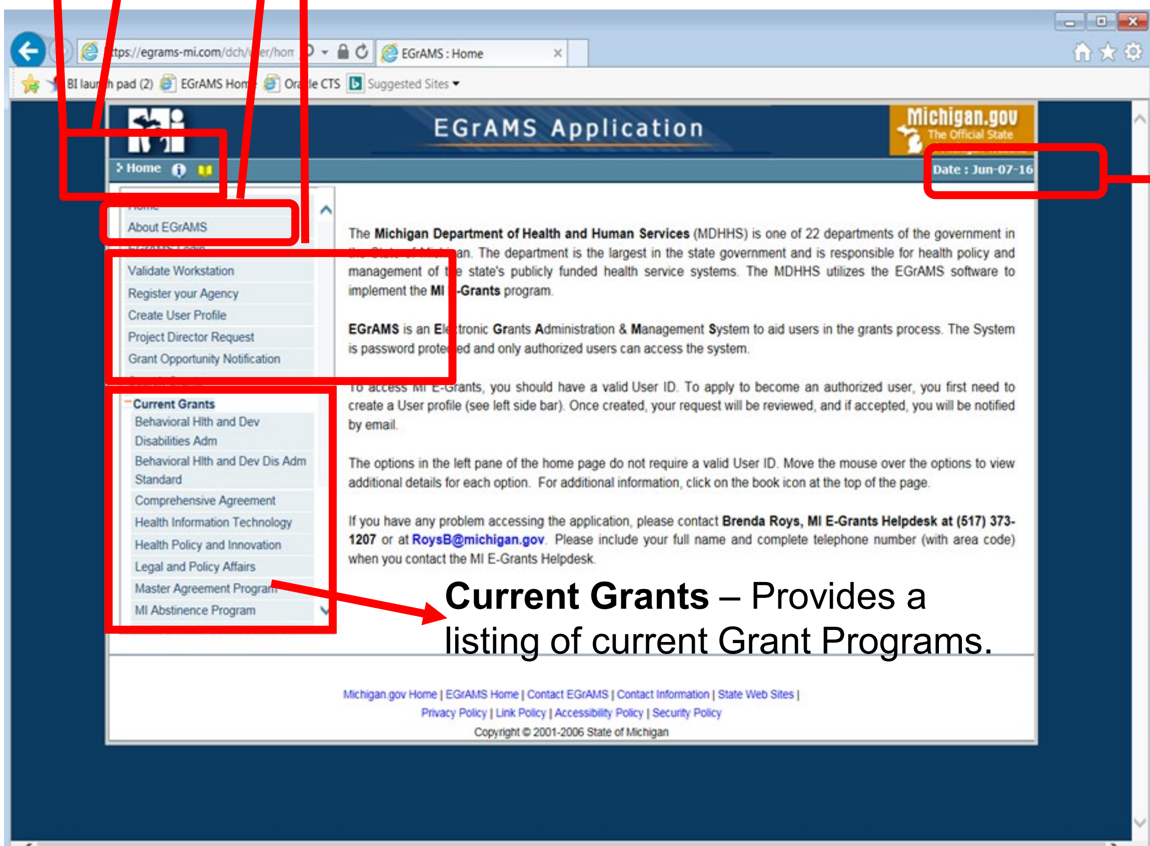
- Options on the "Home" page that can be accessed without logging into the system:

Screen Information – Provides high level information on the screen.

Screen Help – Provides detail instructions and help about the screen.

About EGrAMS – Provides detail instructions, training documents and webinars.

Menu Tool tip - Helpful information.



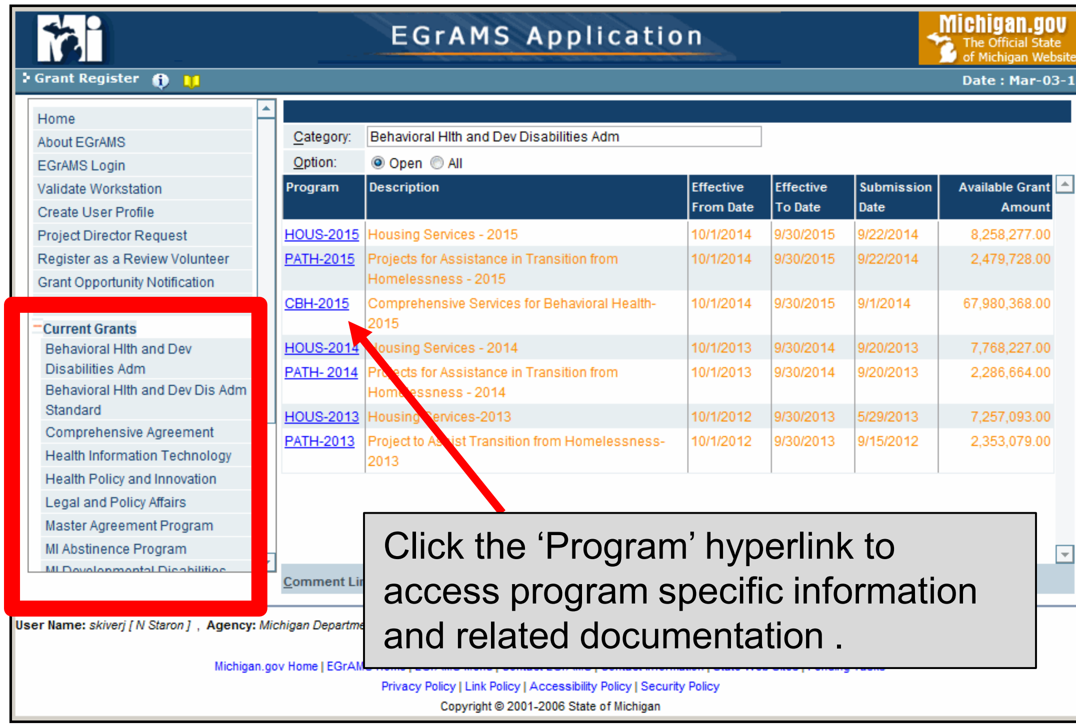
Current Grants – Provides a listing of current Grant Programs.

Current Date

> ***NOTE***: To access the MI E-Grants system, you need.:
> - A valid User name and a password.
> - An Active User status.

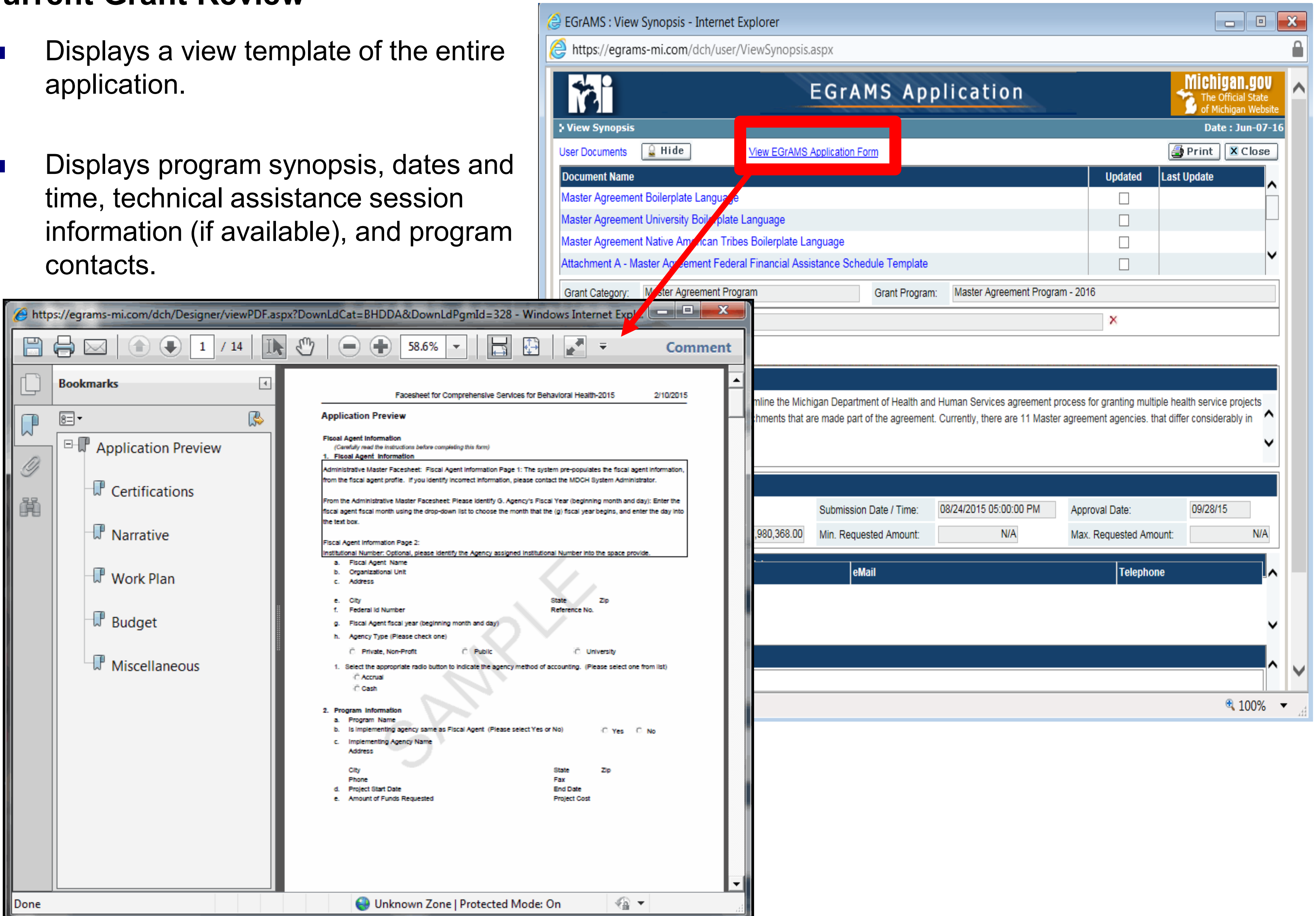
Current Grant Review

- From the Left Menu option, Under the “Current Grants” section, select a Grant Program for additional general information about a specific Grant Program.
- The System displays available Grant Programs for the respective grant category.
  - **Category:** Displays the selected grant category.
  - **Option:** Select the appropriate radio button.
    - **Open:** Shows current grant programs (default).
    - **All:** Shows current and past grant programs.
  - Available Grant Programs - within the selected category - will appear as shown:
    - **Program:** Grant Prefix
    - **Description:** Full Name of the Grant Program
    - **Effective from Date:** Program Start Date
    - **Effective to Date:** Program End Date
    - **Submission Date**: Application Due Date
    - **Avl Grant Amount**: Grant Program Total available funding.



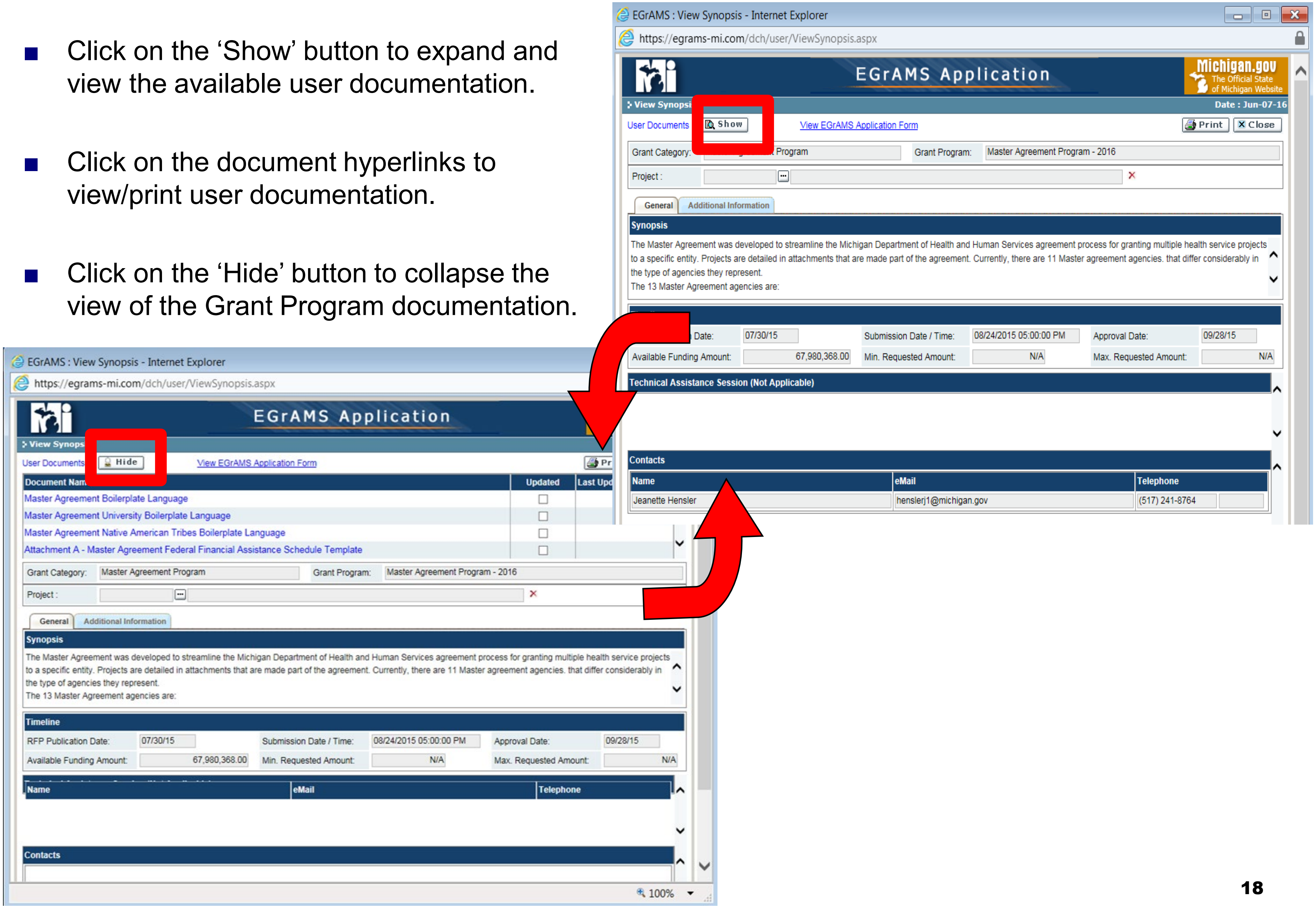
Current Grant Review

- Displays a view template of the entire application.
- Displays program synopsis, dates and time, technical assistance session information (if available), and program contacts.



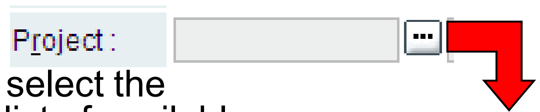
Current Grant Review

- Click on the ‘Show’ button to expand and view the available user documentation.
- Click on the document hyperlinks to view/print user documentation.
- Click on the ‘Hide’ button to collapse the view of the Grant Program documentation.

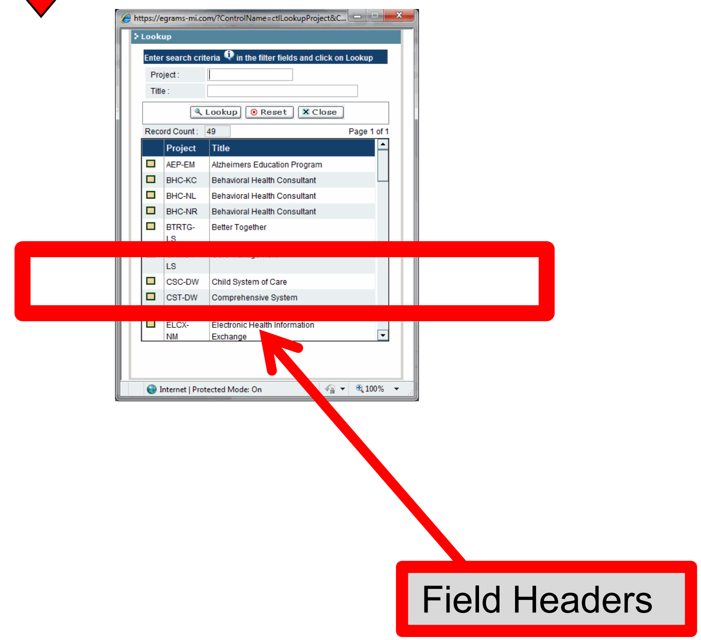


Navigating within MI E-Grants

- Learning the basic MI E-Grants Navigation techniques will enable the User to access needed information quickly by narrowing the search criteria.



- **Value Lookups**
  - Lookups enable users to select the appropriate value from a list of available choices.
- **Invoking a Lookup**
  - Click on the ‘Lookup’ icon.
  - Based on the field, the system displays all available values.
  - The available choices are displayed in ascending order by the ‘Description Field Header.’
  - Click on the ‘Field Headers’ to change sort order of appropriate field.

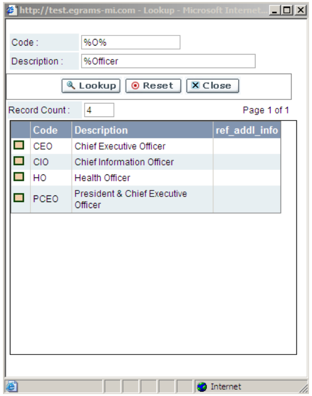


- **Selecting the desired value**
  - Moving the mouse over the displayed rows highlights the respective row.
  - To select the desired record, click in the box, creating a check mark
  - The ‘Lookup’ pop-up will close upon a selection and the selected value will appear in the ‘Lookup’ field on the parent screen.

Navigating within MI E-Grants

- Search Criteria Lookups
  - Enter desired criteria in the 'Search Fields':
    - User defined search criteria from code and/or description.
    - Wild card character is '%'.
    - Wild cards – prefix, suffix & in between.
    - Sorting by Code and/or Description in ascending & descending order.
  - Click on 'Lookup' button to search the records based on entered criteria.
  - Click on 'Reset' button to clear entered search criteria.
  - Click on 'Close' button to return to parent screen without selecting a value.

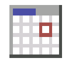
Search Fields

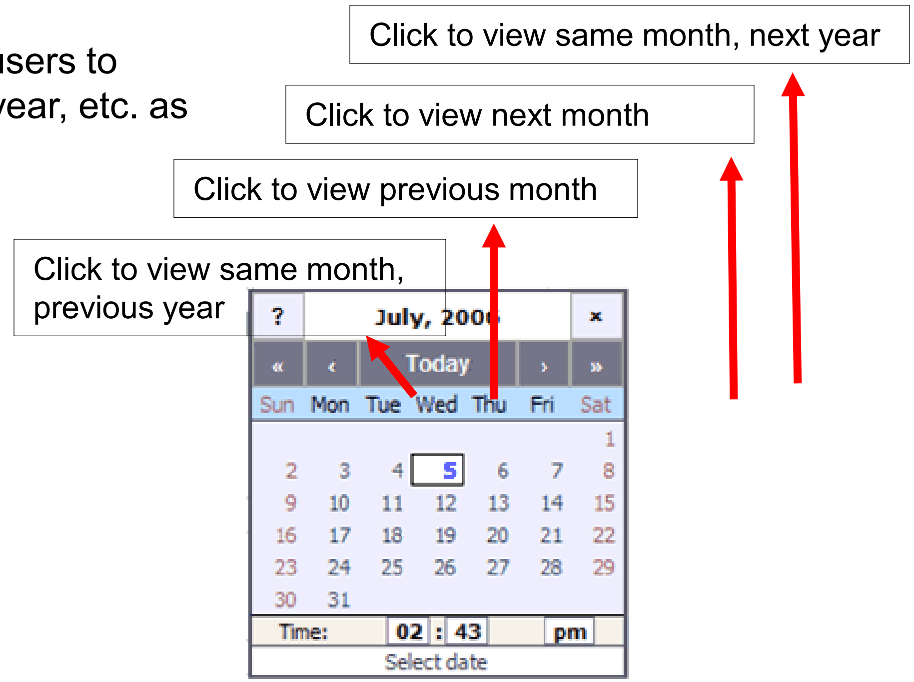


NOTE: The above search criteria specifies that the letter "O" must appear in the Code column results **and** the word "Officer" must appear within the Description column results.

Navigating within MI E-Grants

- **Calendar Lookups -** Calendar Lookups enable users to select the appropriate date value across month, year, etc. as required.

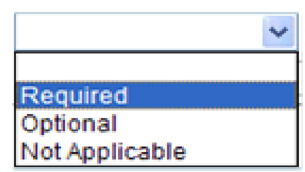
- **Invoking a Calendar Lookup**
  - Click on the ‘Calendar Lookup’ icon. 
  - The system displays the calendar for the current date (day, month, year).
  - Navigate to the desired month, year based on the **<<** **<** **>** **>>** controls.



- **Selecting the desired date**
  - Click on the day in the desired month and year to select a date.
  - The ‘Calendar Lookup’ will close upon a selection and the selected value will appear in the date field on the parent screen.

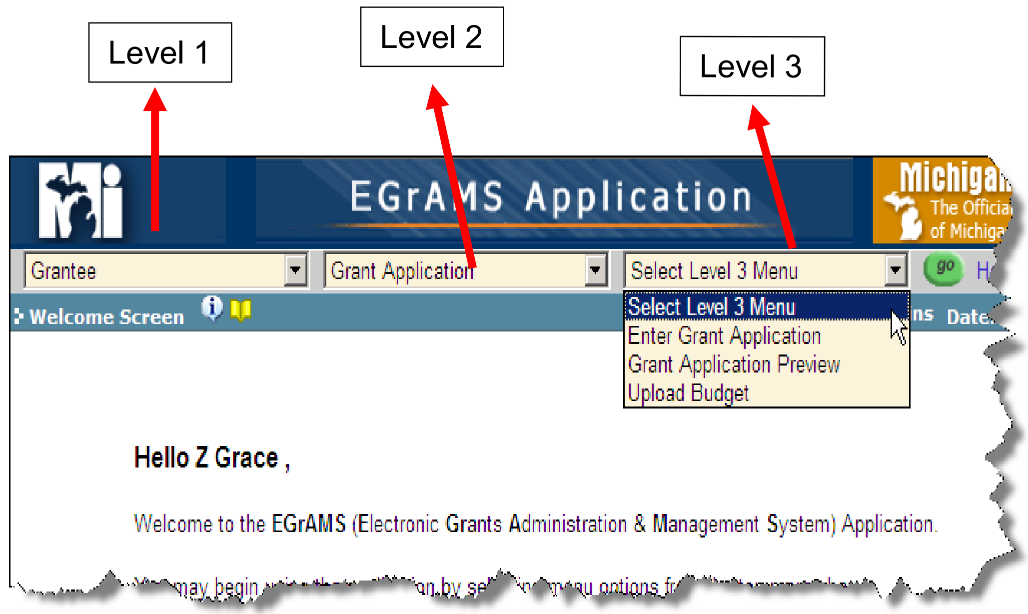
- **Invoking a Dropdown**
  - Click on the ‘Dropdown’ icon  to view a list of available values.

- **Selecting the desired value**
  - Click on the displayed value to select the respective choice
  - In addition, the user may use the up and down arrow keys to view the available choices.



Menu Styles

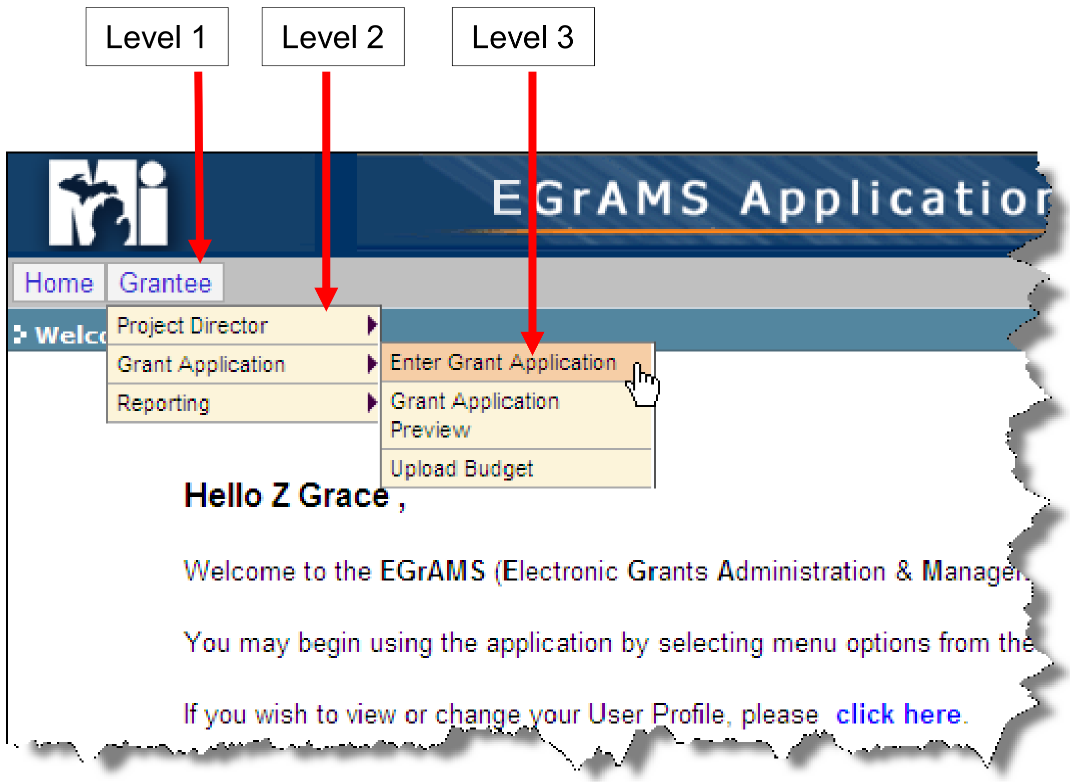
- MI E-Grants supports three type of menus – **Dropdown**, **Dynamic**, and **Menu List**.
- The **Dropdown Menu** is the default menu choice.
- After logging into MI E-Grants successfully, the user can move forward using the Dropdown Menu choices.
- From any screen the User:
  - Selects Level 1 Menu. In this case the user selects Grantee.
  - Selects Level 2 Menu. In this case the user selects Grant Application.
  - Selects Level 3 Menu, to select the desired action screen.
  - Click on the 'Go' button to initiate the desired action.



Menu Styles

- The **Dynamic Menu** displays the path to the screens a user can access within the MI E-Grants system, based on the role and permissions of that user.

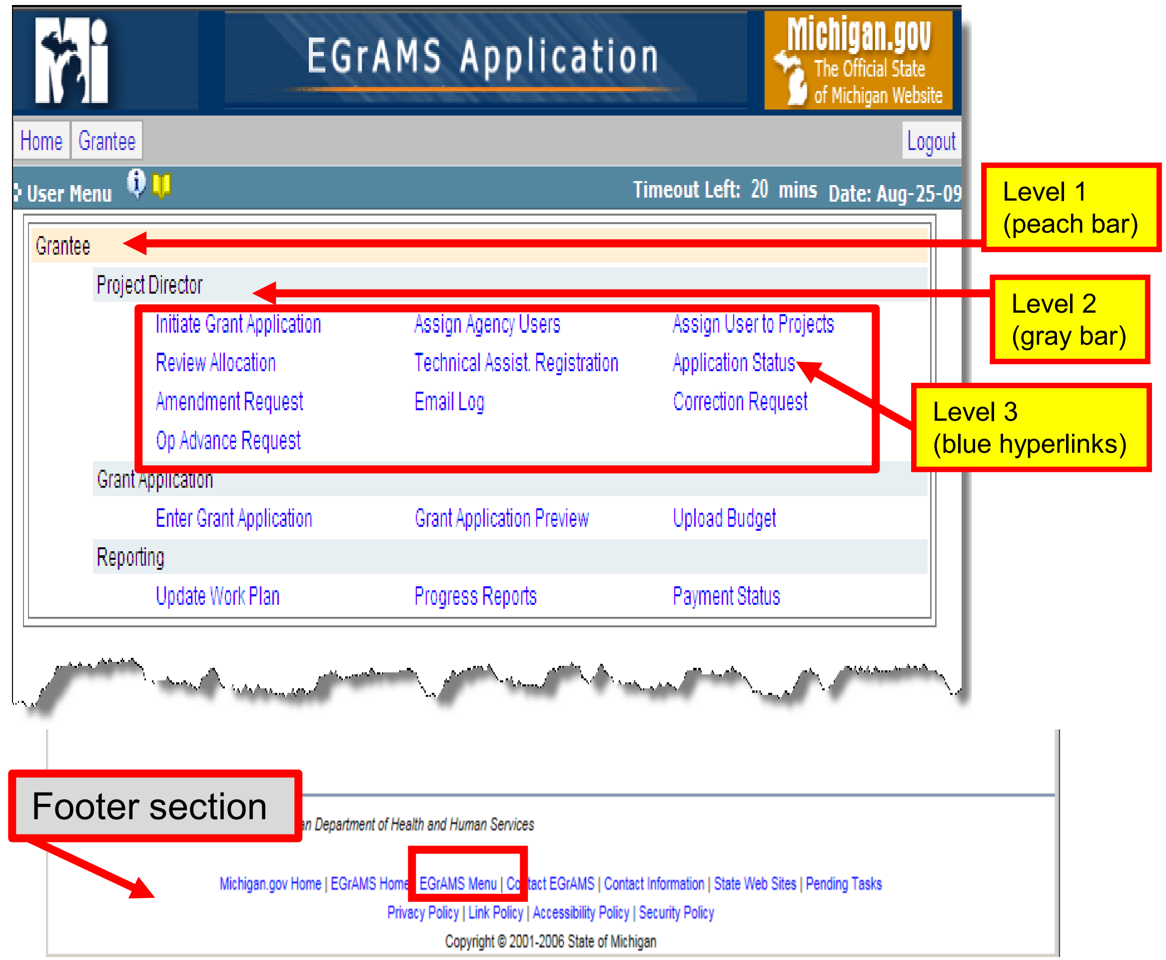
- To utilize this menu type, the user must update their User Profile to select the 'Dynamic' from the Menu Style (see page 10 for instructions).
- The system will update to reflect the Dynamic Menu style shown here.
- From any screen the User:
  - Places the cursor over Level 1 Menu. In this case the user selects Grantee.
  - Places the cursor over Level 2 Menu. In this case the user selects Grant Application.
  - Places the cursor over Level 3 Menu and clicks to initiate the desired action. The system will refresh and open on the selected screen. The User can then complete his/her task(s).



Menu Styles

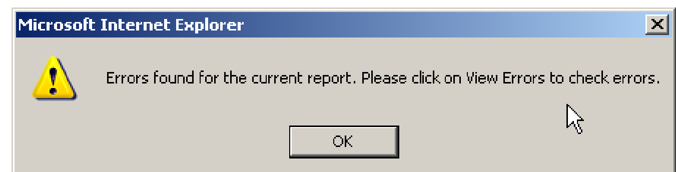
- The **Menu List** is a standard feature and can be accessed from <u>any</u> screen by clicking on the 'EGrAMS Menu' hyperlink located in the Footer section of the screen.
- The **Menu List** displays all the Action screens a user has access to within the MI E-Grants system.

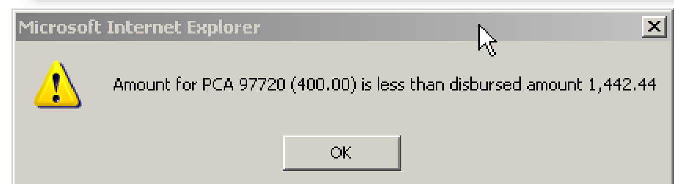
- After logging into MI E-Grants, the user can move forward using the Menu List by following below instructions:
  - From any Action screen, click on '**EGrAMS Menu**' link in the Footer section of the screen.
  - The system displays a Menu List, based on the User's assigned Permission Code/Role within the system. ***NOTE:*** Different permissions display different menu options.
  - Select the desired Action screen by clicking on blue hyperlink (a.k.a. Level 3 menu). The system will refresh and open on the selected screen. The User can then proceed with his/her task(s).



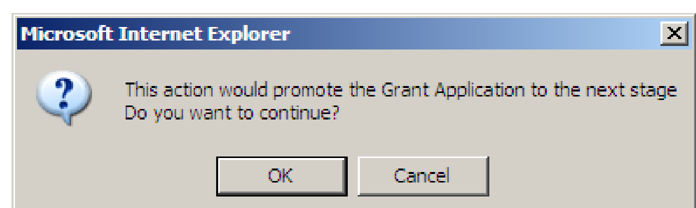
Information and Confirmation Messages

- MI E-Grants verifies that the information entered by Users with permission to "Add," "Change", and "Delete" is processed according to the Grant Program's configured business rules.
- All field level verifications or validations are done online and errors are displayed by the system. For example, MI E-Grants validates to assure that the deviation allowances does not exceed a specified percentage amount or specific match requirements are met when these business rules are configured.
- Validation is important and allows the User to have confidence that all required fields are completed properly.
- **Information Message:**
  - Displays a pop-up window with the appropriate error or warning message.
  - Click on 'OK' to acknowledge the message.



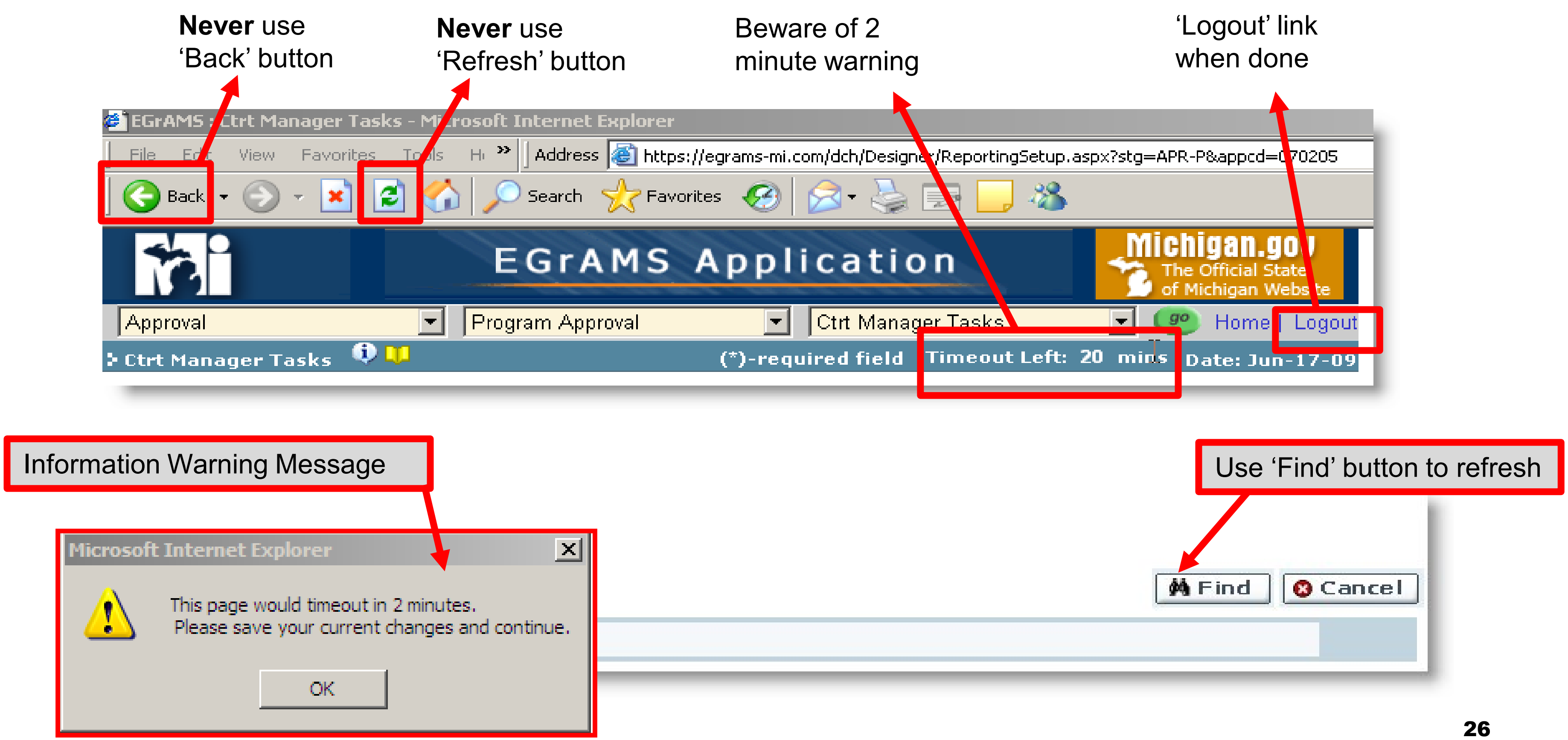


- **Confirmation Message:**
  - Displays a pop-up window with the appropriate error, warning, or confirmation message.
  - Provides the User a choice to confirm or cancel a certain action.
  - Click on 'OK' to confirm.
  - Click on 'Cancel' to cancel the action.



A Word of Caution

- **WARNING: Never use the ‘Back’ button or the ‘Refresh’ button from the Internet Explorer browser toolbar.**
- Pay attention to the Timeout Left [Timeout Left: 19 mins] display. Save, if applicable, and refresh using the [Find] ‘Find’ button if it gets to 4 minutes.
- The system gives a warning (information) message at 2 minutes.
- Use the ‘TAB’ key or the mouse to navigate across fields.
- Always [Logout] after you complete your work.



System Security

- Role & Permissions in MI E-Grants
- Assigning Users to an Application
- Logging into the System
  - Forgot Password
  - Change Password

Role & Permissions in MI E-Grants

MI E-Grants is set up to provide controlled access to the system. Based on the Role, the ability to add, modify, or delete information is further limited by a User's permission.

- **Role Code**

  Grantee – an individual or group from the Agency receiving the Grant (selected on User Profile).

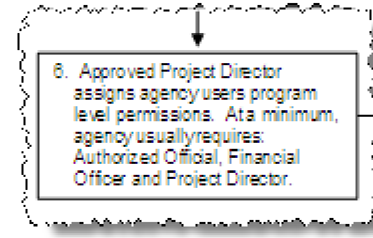
- **Permission Codes (all permission codes can do data entry within the system)**

  These codes determine what Permissions are given to each User:

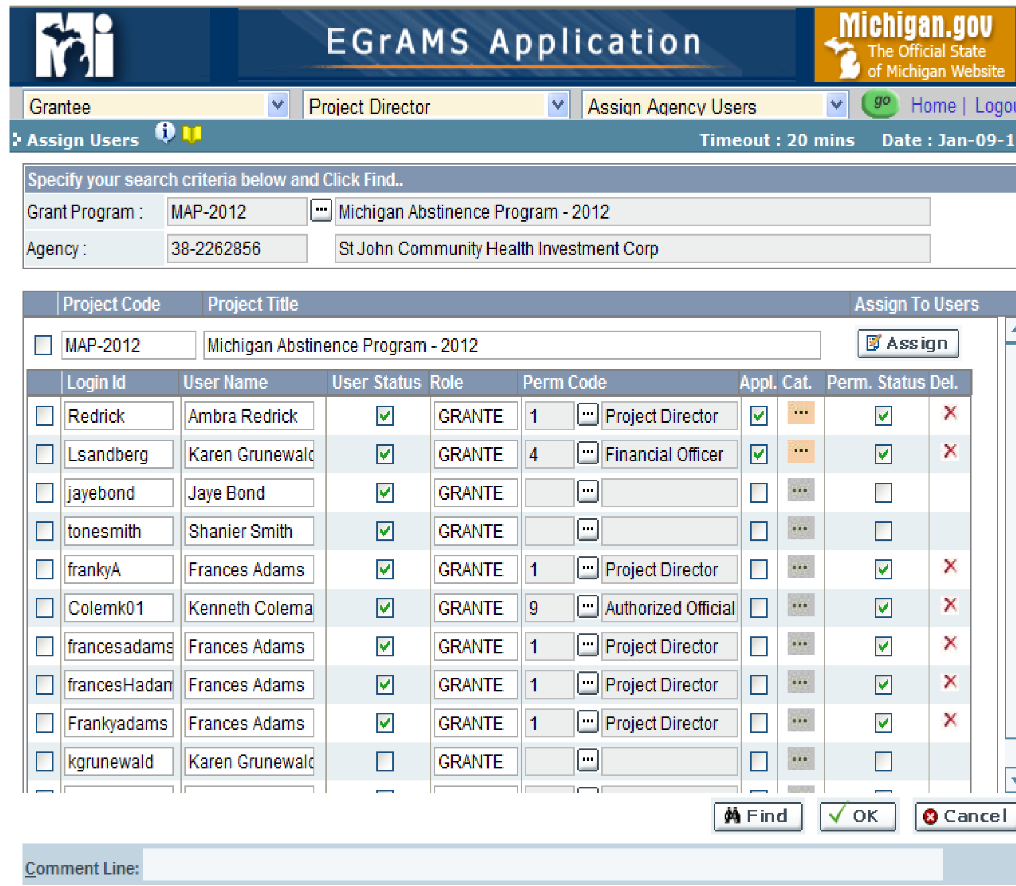
  - **Project Director (required)** – a person from your Agency responsible for performing administrative tasks such as: assigning other Agency Users, activating and deactivating users, restricting access to projects, etc.
  - **Grant Writer** – a person from your Agency responsible for entering grant application information.
  - **Financial Officer (required) –** oversees financial operations and submits financial reports for your Agency.
  - **Authorized Official (required) –** authorized to submit project applications and sign a binding agreement on behalf of your Agency.
  - **Report Administrator –** a person from your Agency responsible for completing and submitting non-financial reports.

Note: Contact the MI E-Grants Helpdesk:
MDHHS-EGrAMS-HELP@michigan.gov or 517-335-3359

Activate and Assign Agency Users



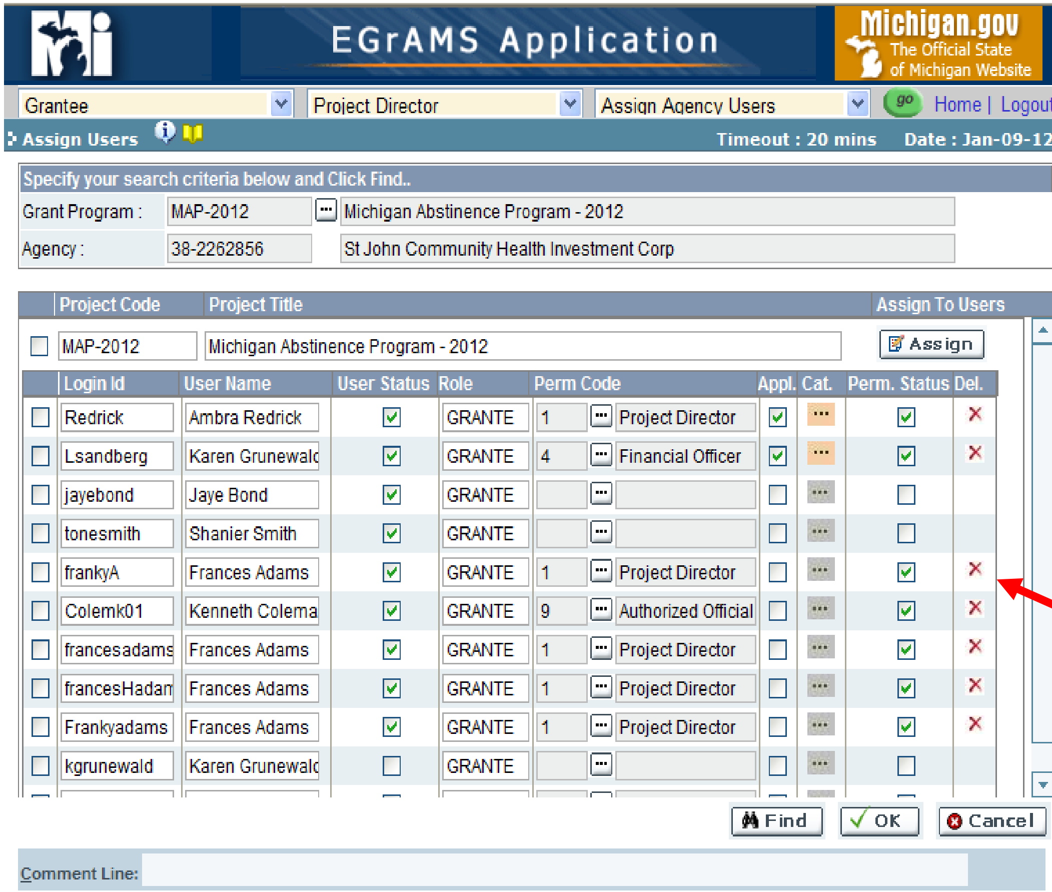
- Only the **Project Director** from the Grantee Agency will perform this function within the system.
- Navigate to: **Grantee -> Project Director -> Assign Agency Users** from the drop-down menu click the 'Go' button.
- The system will display the 'Assign Users' screen, as shown
- **Grant Program**: Select a Grant Program using the 'Lookup' icon.
- **Agency**: System displays pre-populated information.
- Click the 'Find' button.
- Click the 'Assign' button.
- **User Listing**: All registered Users of the system for your agency will appear in this list.
  - If the User is not shown, verify with the user that he/she has created profile.
  - If the User has created a profile and you're still unable to view them in the list contact the MI E-Grants System Administrator
- **User Status**: Check box next to the name of the user to activate user to selected program.
- **Role**: System has pre-populated information.



Login Id	User Name	User Status	Role	Perm Code		Appl.	Cat.	Perm. Status	Del.
Redrick	Ambra Redrick	☑	GRANTE	1	Project Director	☑	...	☑	✕
Lsandberg	Karen Grunewalc	☑	GRANTE	4	Financial Officer	☑	...	☑	✕
jayebond	Jaye Bond	☑	GRANTE			☐	...	☐	
tonesmith	Shanier Smith	☑	GRANTE			☐	...	☐	
frankyA	Frances Adams	☑	GRANTE	1	Project Director	☐	...	☑	✕
Colemk01	Kenneth Colema	☑	GRANTE	9	Authorized Official	☐	...	☑	✕
francesadams	Frances Adams	☑	GRANTE	1	Project Director	☐	...	☑	✕
francesHadan	Frances Adams	☑	GRANTE	1	Project Director	☐	...	☑	✕
Frankyadams	Frances Adams	☑	GRANTE	1	Project Director	☐	...	☑	✕
kgrunewald	Karen Grunewalc	☐	GRANTE			☐	...	☐	

Activate & Assign Agency Users

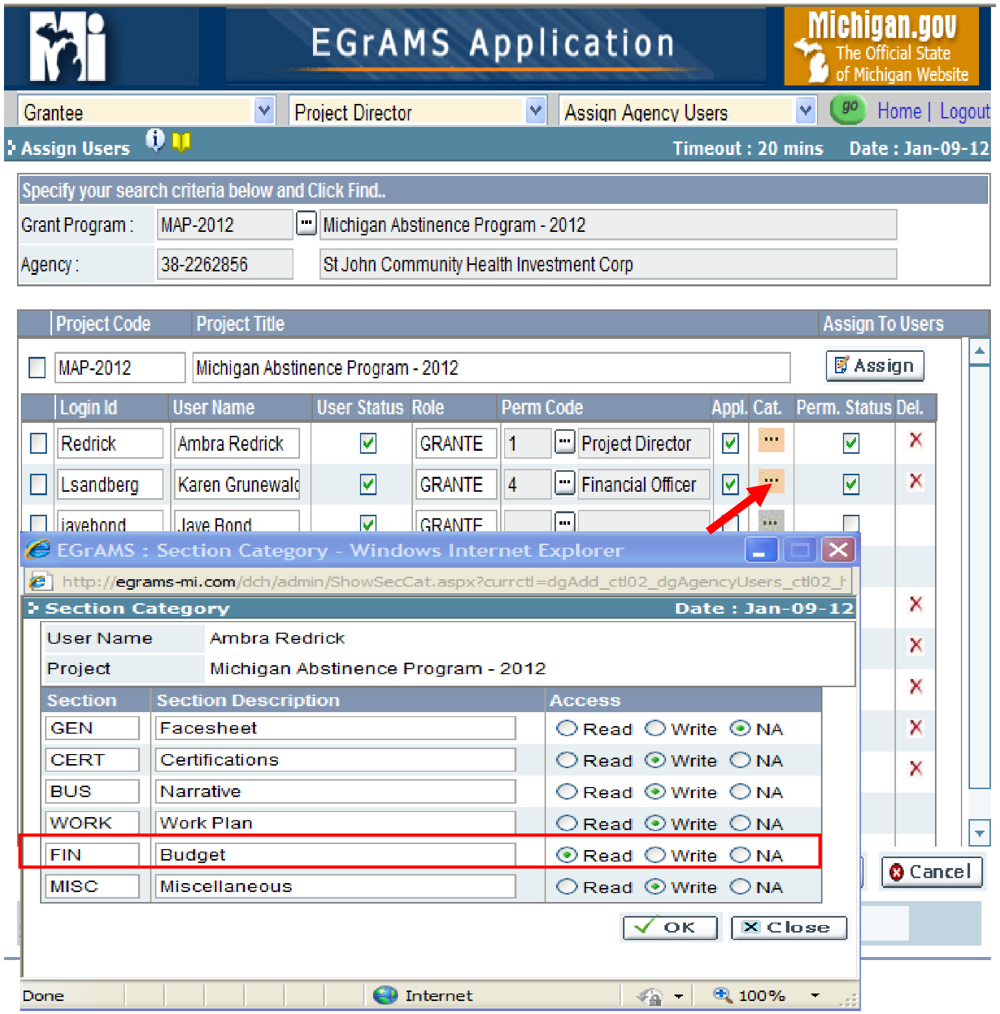
- Until a Project Director activates & assigns a User, the User status is inactive, and they are unable to access the system.



- **User Status**: Allows the User access to the system,
  - To grant access to system select check box.
  - To remove access, uncheck box.
- **Perm. Status**: Allows the User access to the program,
  - To grant permission access to program select check box.
  - To remove access grant permission to program, uncheck box in the perm. status column.
- **Delete**: Allows a user to be deleted from a selected program. (Step can only be done, after a user has been assigned to a program).
  - Select the red ‘X’ icon, which turns into a red trash can icon.
  - Click the ‘OK’ button.

Activate & Assign Agency Users

- The Project Director is able to restrict User access to a program application by limiting access to specific application section levels.
- By default a user assigned to an application has ‘Write’ permission to all section levels.



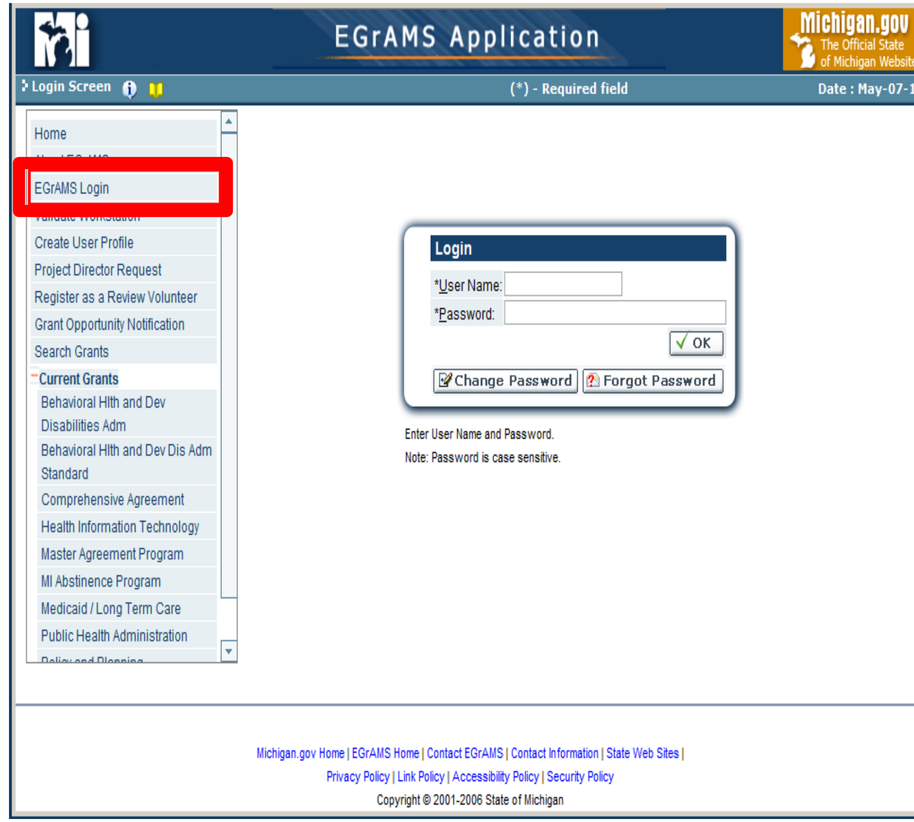
- To restrict/assign access at a section level
  - **Cat. Appl**.: Check the box in the ‘Category Application. This will enable the selection of the category icon specifying further restrictions.
  - **Category**: Click the ‘Lookup’ icon. (The system will display a pop-up window of the section category screen)

- Section Category Screen
  - **Section**: System section code.
  - **Section Description**: Application Section Name.
  - **Access**: Click on the radio button to select the access type:
    - Read: Read only view of application section.
    - Write: Write to the application section.
    - NA: No Access to the application section.
  - Click ‘OK’ to save change.
  - Click ‘Close’ to the window.

- Repeat process for each application that requires restricted access.
- Click ‘OK’ to save change.
- Click ‘Cancel’ to discard.

Once an Agency User is Assigned and receives a Confirmation email:

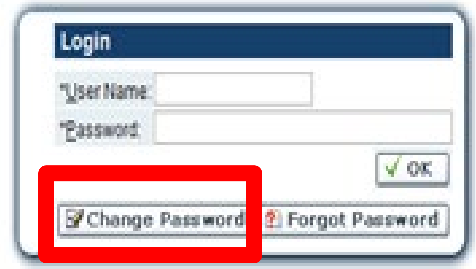
- Log into MI E-Grants application at http://egrams-mi.com/dch .
  - Select ‘EGrAMS Login’ from the ‘Left Menu’ option.
  - The system will display the Login screen as shown below.
- Enter your User Name and Password.
  - Password is case sensitive.
  - The system will lock you out after **‘5’ (five)** unsuccessful login attempts.
  - MDHHS does NOT maintain your password – This is the User’s responsibility.
- Click ‘OK’ button to Login.
- If your credentials are correct, the system will display:
  - The Welcome Screen;
  - The Menu options as applicable to your Permission Code.
- If your credentials are incorrect, the system will display an error information message. To continue:
  - Acknowledge the message.
  - Try to login again OR click on the ‘Forgot Password’ button.
  - The system will lock you out after **‘5’ (five)** unsuccessful login attempts.
  - Contact the MI E-Grants System Administrator after unsuccessful attempts.



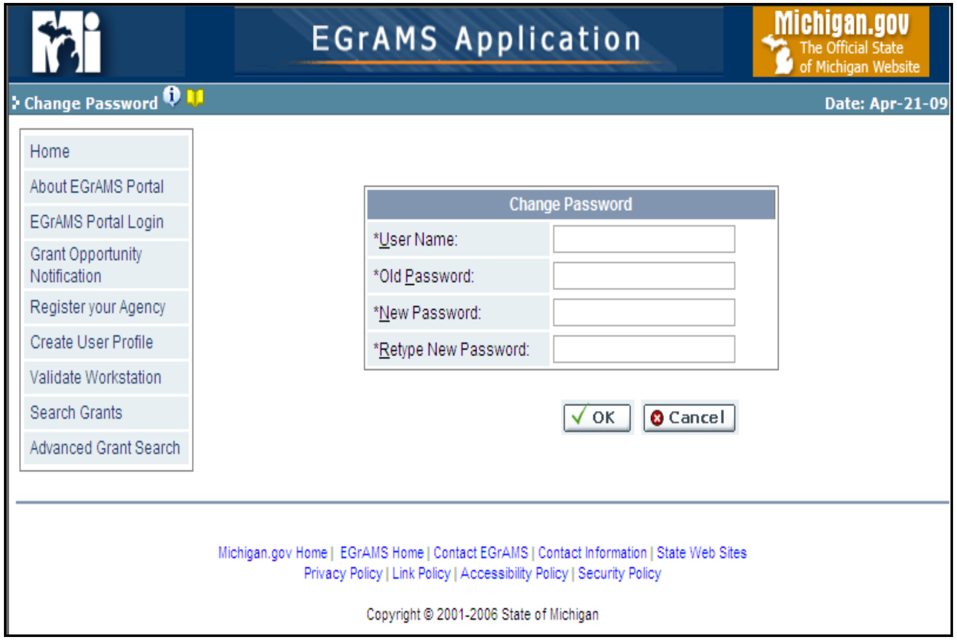
NOTE: Password expires every 120 days

Change Password

- You may *Change* your password, if:
  - Your password has expired or you are warned your password will expire in 7 days;

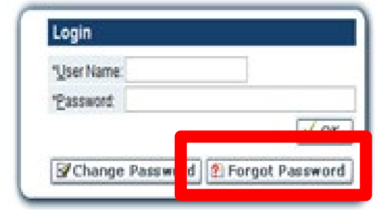


- To change your password, select 'EGrAMS Login' from the navigation menu, click the ' Change Password' button.
- The system will display the change password screen:
  - Enter your User Name and old Password.
  - Enter your new Password & retype new Password (alphanumeric **only**).
  - Click 'OK' to save your new Password.
  - Click 'Cancel' to discard the change.
- If your user name or password are incorrect, the system will display:
  - An error information message.
  - Acknowledge the message.
  - Try again, use the 'Forgot Password' option or you may call the MI E-Grants System Administrator.



Forgot Password

- You may use ‘Forgot Password’ function, if:
  - Your password has expired.;
  - You want to change your password, but you cannot remember your old password.



- To reset your password, select ‘EGrAMS Login’ from the Left Menu option, click the ‘Forgot Password’ button.
- The system will display the reset password screen.
  - Enter your ‘User Name’, click the tab key.
  - Your security question(s) that you registered with your User Profile will appear.
  - Enter the answer to your security question(s).
  - Enter your new Password & retype new Password (alphanumeric **only**).
  - Click ‘OK’ to save your new Password.
  - Click ‘Cancel’ to discard the change.
- If your User name or security question answers are incorrect, the system will display:
  - An error information message.
  - Acknowledge the message.
  - Try again OR you may call the MI E-Grants System Administrator.

Note: Contact the MI E-Grants Helpdesk: MDHHS-EGrAMS-HELP@michigan.gov or 517-335-3359

Getting Started with MI E-Grants

- Becoming a MI E-Grants User
  - Preparing Your Workstation
  - Creating/Managing User Profile
  - Navigating the MI E-Grants System
  - System Security

- **Internet Explorer** – Browser *Favorites* bookmark:
  - User/Agency Profile Website URL Address: **http://egrams-mi.com/portal**
  - Grant Agreement Website URL Address: **http://egrams-mi.com/dch**

Questions?

Grantee Flow Chart

Grant Application

- Allocation Notification
  - Email Notification
- Understanding Application Tools
  - Application Sections (Tabs)
  - Action Buttons
  - Validate Application for Errors
- Application Entry

Grant Agreement Flow Chart

MICHIGAN DEPARTMENT OF HEALTH AND HUMAN SERVICES
MI E-GRANTS STANDARD AGREEMENT APPLICATION FLOWCHART

Pre-Application **START- HERE**

1. Applicant receives an email allocation letter notifying them of this year's allocation.
2. Applicant selects a Grant Program from the **Current Grants** listing by clicking on blue hyperlink.
3. Applicant clicks on **User Documents – Show** and/or **View EGrAMS Application From** to review/print provisions and/or application.
4. Applicant selects **Create User Profile** from side bar menu to become a system user.
5. Once activated, agency assigns one user to be **Project Director and notifies program staff of selection.**
6. Approved Project Director assigns agency users program level permissions. At a minimum, agency usually requires: Authorized Official, Financial Officer and Project Director.

Enter Application and Complete Project Sections

7. Active users path to **Grantee>Grant Application>Enter Application** and select an application from the list.
8. Project Director or Grant Writer completes **Facesheet** Section and validates. Successful validation results in no errors.
9. Project Director or Grant Writer completes **Certification** Section and validates. Successful validation results in no errors.
10. Project Director or Grant Writer completes **Narrative** Section and validates, if applicable. Successful validation results in no errors.
11. Project Director or Grant Writer completes **Work Plan** Section and validates. Successful validation results in no errors.
12. Project Director, Grant Writer or Financial Officer complete **Budget** Section and validates. Successful validation results in no errors.
13. Project Director or Grant Writer completes **Miscellaneous** Section and validates, if applicable. Successful validation results in no errors.
14. If errors are detected in application sections listed in steps 8-13, correct errors. Click Close to go back to Projects List.

Project Section Completion and Application Submission

15. Choose another pending application from list.
16. Repeat steps 8 – 14 to complete the application.
17. Authorized Official paths to **Grantee>Grant Application>Application Preview** and enters Application.
18. Authorized Official selects and reviews validated applications. Validated applications show an open **Submit** box.
19. Authorized Official selects validated projects and checks the Submit boxes; then clicks the Submit action button.

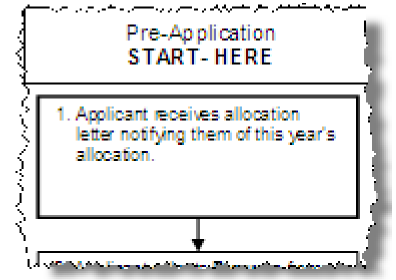
Application Outcome **END HERE**

20a. Project Director is notified via email of Revisions Request for projects, and returns to step 7 to revise and resubmit.

Or

20b. Project Director is notified that master agreement application is approved

21. Authorized Official paths to **Grantee>Project Director>Application Status** to review/print Grant Agreement.
22. Authorized Official electronically signs Grant Agreement



Allocation Notification Email

- MDHHS Publishes the Grant Agreement Application.
- The Grantee receives a system generated email which specifies allocation information.

Email Information Date : May-21-18

From :	geistl1@michigan.gov	Sent :	Sep-14-17 09:23:08 AM
To :	joyceh@preventionnetwork.org		
Subject :	MDHHS Fiscal Year (FY) 2018 Substance Use Disorder- 2018 Project Allocations		
Message :			

September, 14 2017

Dear

The following chart is a complete list of the FY 2018 allocations for your organization for funding administered by the Michigan Department of Health and Human Services (MDHHS) through the Project-Based Standard Agreement. These allocations are based on anticipated FY 2018 Appropriations for MDHHS and are subject to the availability of funds, MDHHS's Appropriation Act for FY 2018, MDHHS approval, and State Administrative Board approval.

Please complete the applications, including the work plans and budgets, and submit your applications through MI E-Grants within **three weeks** for the projects listed. When each individual project application is completed, please have your Authorized Official submit the project. This will facilitate timely processing of your agreement. If you are not able to submit your applications within this time period, please contact your Grants Section Liaison,
If you have questions about submitting individual allocations, please contact your Grants Section Liaison noted above.

All allocations must be budgeted and expended consistent with the requirements contained in your allocation.

Allocation Table

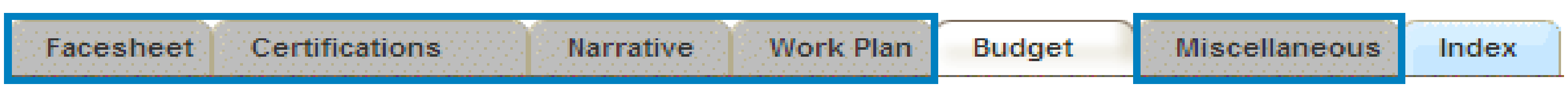
Title	Type	Allocation $
FDA Tobacco Retail Inspection	Allocation	583,899.00
Substance Abuse Prevention and Treatment (Block Grant)	Allocation	100,000.00
TOTAL		**683,899.00**

Next Steps

- **Application Entry Header:**
  - Displays the name of the Agency, the Grant Program, Application Title and Show Documents hyperlink.
  - The header is displayed on all pages of the Grant Application.

- **Application Section Tabs:**
  - Displays Section tabs for the respective Grant Project.
  - Section tabs are displayed on all pages of the Grant Application.
  - Clicking on a Section tab takes you to the first page of that Section.
  - The Section tab without color identifies your location in the Application.

  - The Section tab which are gray color identifies restricted access to the Project Application.



Application Section Tabs

- Type of information stored in the various section tabs.

- Demographics
- Program
- Contacts

- Objectives
- Activities
- Activity Contact
- Activity Evaluation criteria
- Measurements

- Additional navigation tool
- Useful for tracking application progress and in identifying / correcting errors

- Certification & assurance agreement

- Project Synopsis is entered.
- Identify counties in which services will be delivered.

- Financial details for the supported expense categories, including funding sources.
- Line Item details, if applicable
- Narratives
- Match details

- If applicable, various attachments, support letters, etc.

Action Buttons

- As the name suggests, the Action button performs the desired task.

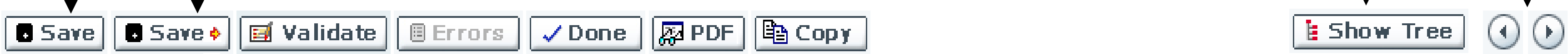
- Saves changes on a page two ways. Click on **'Save'** button to save the information on the current page.
- Click on 

to save the information and move to the next page of the application.
- Moving to the next page <u>without</u> saving your changes will result in a system warning message.

'Arrow' buttons

- Allow you to navigate to the next or previous page.
- At the end of a Section, it navigates to the next or previous Section.

Click on **'Show Tree'** button to get a section tree structure breakdown.



Click on **'Copy'** button to copy information from a previous application.

Click on **'PDF'** button to view a PDF of the current section.

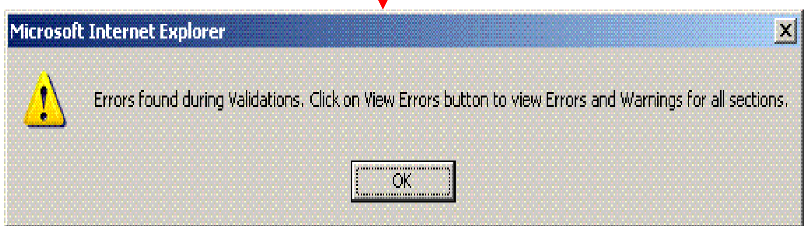
Click on **'Done'** button to validate the all section for errors and business rules in your application.

- The **'Errors'** button is enabled if errors are found after validation.
- If errors are found, click on 'Errors' to view error details.

Click on **'Validate'** button to validate the respective section for errors and business rules in your application.

Application Error checking and corrections

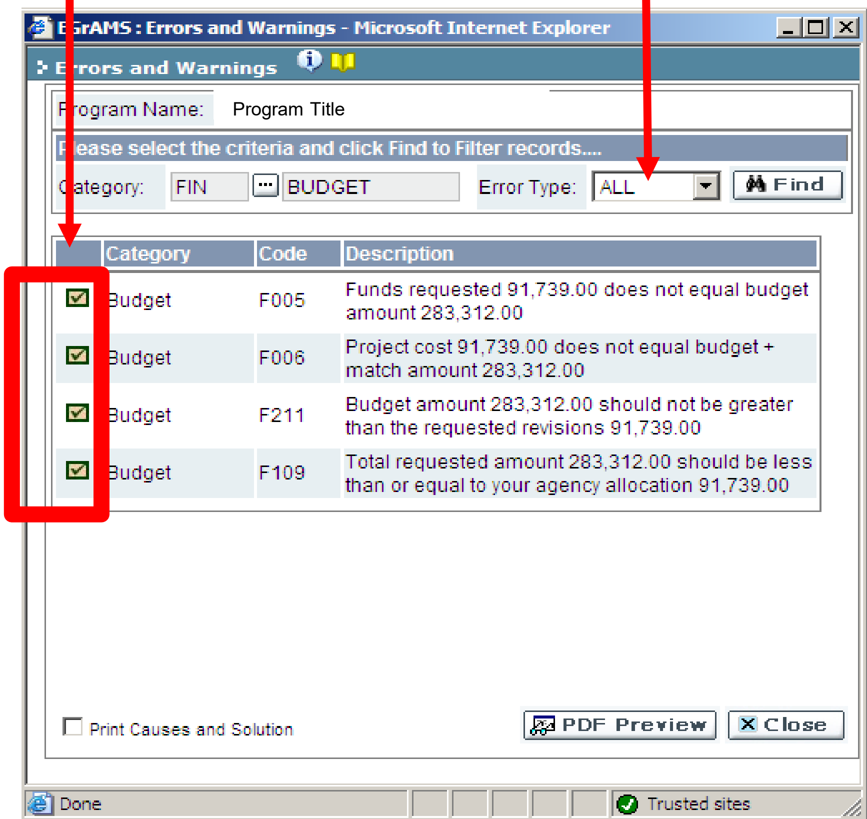
- Click on 'Validate' button.
- If errors are found, the system displays an informational message.



- Acknowledge message and click the 'OK' button.
- The Error and Warning pop-up window will open or click the 'Errors' button to view the list of errors.
- The system displays a list of the error details for each section.
- Click on the error check box to navigate to the page containing the error.
- Click the PDF Preview button to open a .PDF Document of the errors report.
    - **Budget Errors - The system will only direct you to the first page of the budget section.*

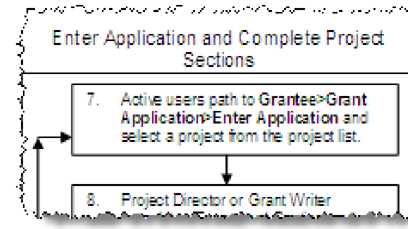
Click on error checkbox to go to the specific error page.

Use 'dropdown' to filter errors by type.

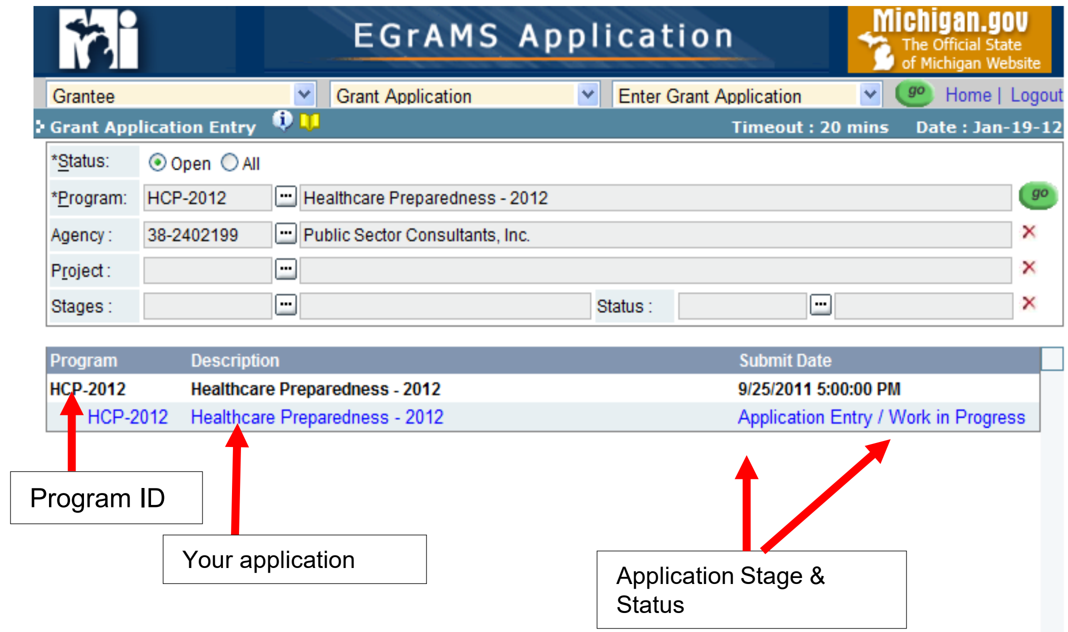


To access the Program Application

- Navigate to: **Grantee -> Grant Application -> Enter Grant Application**, from the drop-down menu. Click the ‘Go’ button.
- The system will display the ‘Grant Application Entry’ screen.

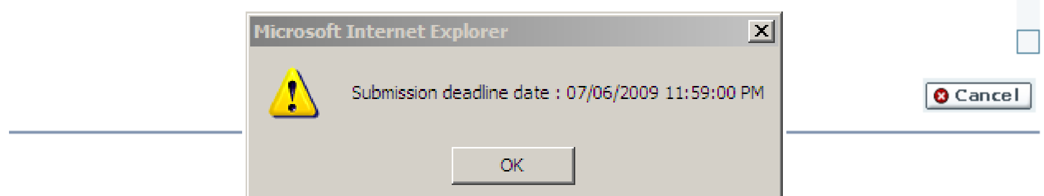


- ***Program**: Select a Grant Program, using the 'Lookup' icon.
- **Agency**: System pre-populates with agency information.
- Additional search criteria, allows you to narrow down your selection.
  - **Project**: Select the Project, using the 'Lookup' icon (Only for Master and Comprehensive agreements).
  - **Stages**: Select the Stage of the application, using the 'Lookup' icon (i.e. Application Entry, Amendment).
  - **Status**: Select the status, after selecting a Stage, using the 'Lookup' icon (i.e. Pending, Work in Progress).
- Click the ‘Go’ button.
- The system displays the available applications to which the user has been assigned.



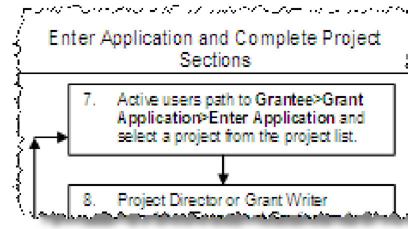
After selecting a application to begin, the system will prompt you to verify the application submission deadline date/time.

Click ‘OK’ to begin entering the application.



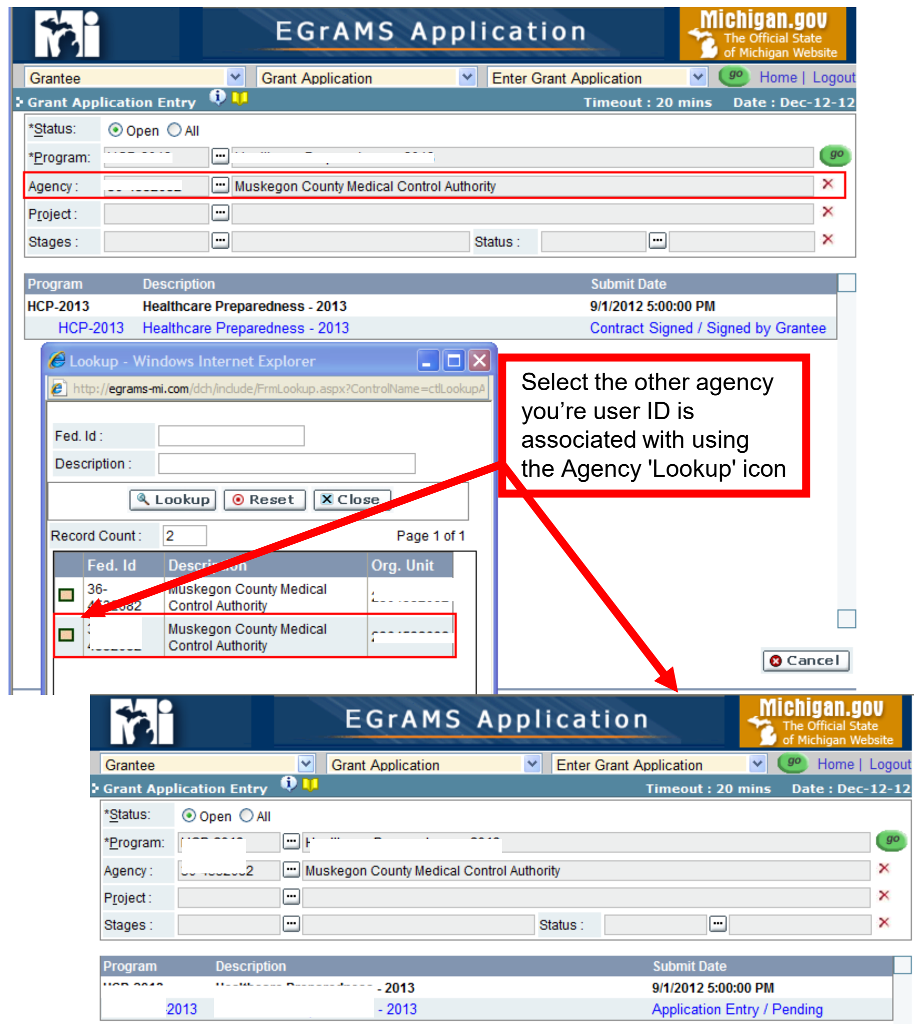
Access Program Applications for Multi-Agency access

- Navigate to: **Grantee -> Grant Application -> Enter Grant Application**, and click the ‘Go’ button.
- The system will display the ‘Grant Application Entry’ screen.



- ***Program:** Select a Grant Program, using the 'Lookup' icon.
- **Agency:** Select a Agency using the 'Lookup' icon.
  - A listing of Multi-Grantee Agency for this User will be shown in the 'Lookup' pick list.
  - Select the Grantee agency you will be working with, to complete the tasks.
- Click the ‘Go’ button.
- The system displays the available applications to which the User has been assigned under the Multi-Agency access request.
- If you need assistance, contact the MI Grants Helpdesk:

  MDHHS-EGrAMS-HELP@michigan.gov
  or 517-335-3359



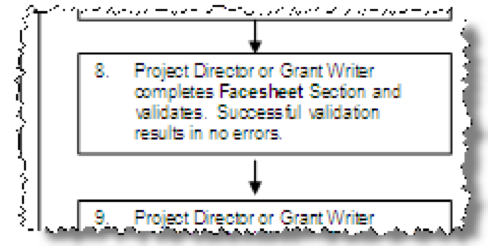
Program Applications and Amendments

- The following instructions (pages 47 – 80) apply to both original project applications and any project amendments that may be processed during the grant period.

- During amendment, only the Facesheet, Work Plan, and/or Budget sections may be available for update.

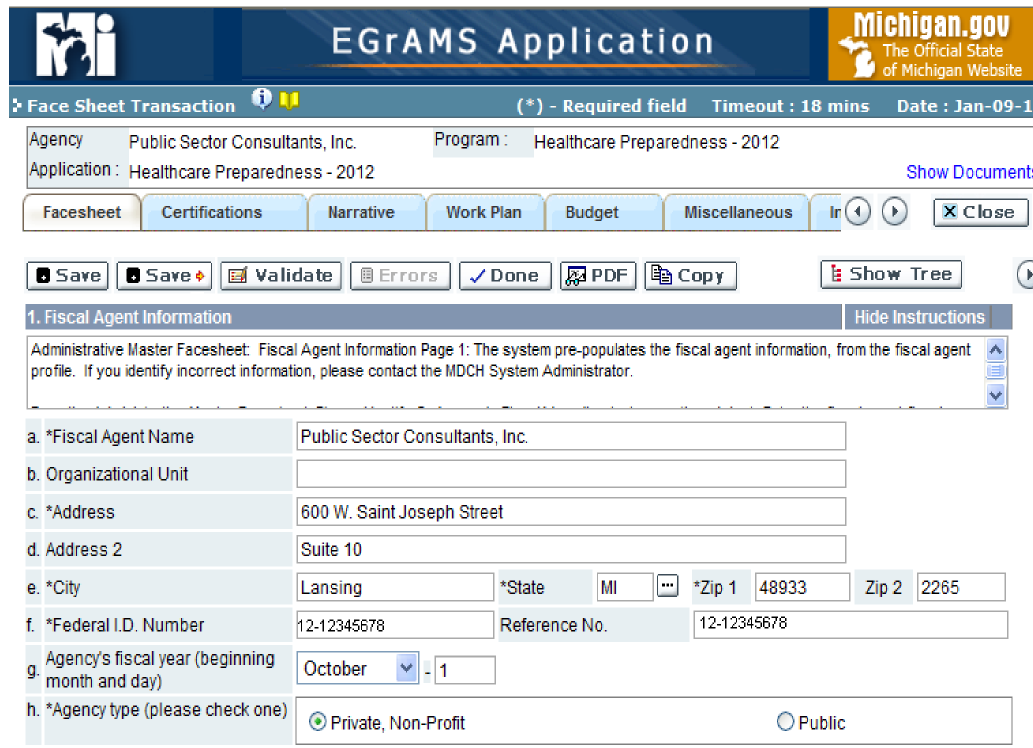
Program Application – Facesheet Section:

- The application facesheet contain general contact information, program allocation amount and the agencies key contacts for the program.



1. Fiscal Agent Information

- MI E-Grants pre-populates the fiscal agent information. This information is pulled from the grantee agency profile.
- Choose the Agency Fiscal Year beginning Month & enter the Day.
- If the information on the Fiscal Agent Information screen is incorrect, contact the MI E-Grants System Administrator to make the correction.
- Click 'Save' button to save the information on the screen or click 'Save->' button to save the information and advance to the next screen.



Contact the MI E-Grants Helpdesk:
MDHHS-EGrAMS-HELP@michigan.gov or 517-335-3359

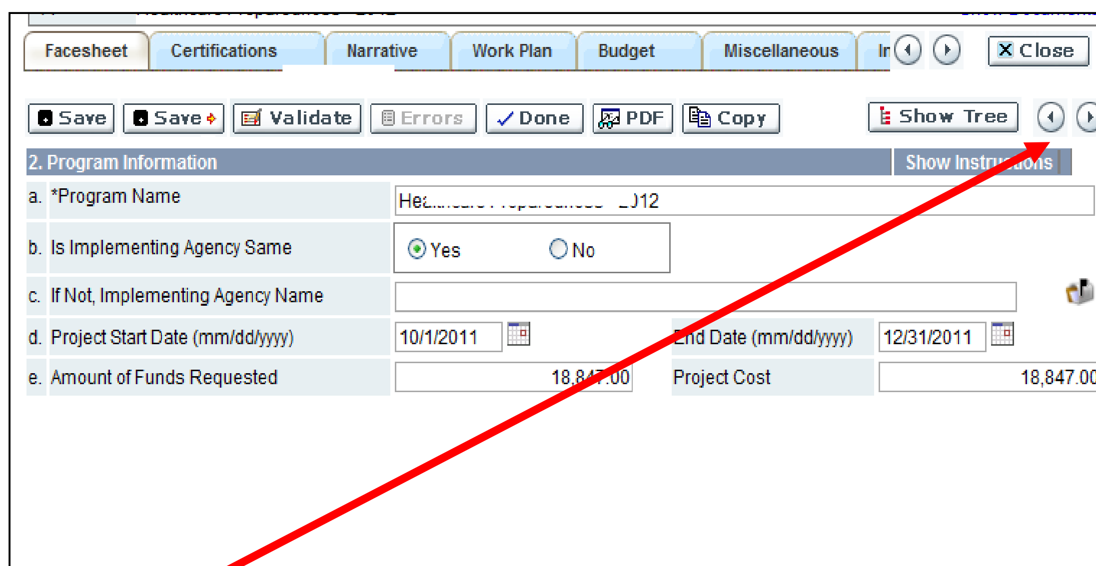
2. Program Information

- MI E-Grants pre-populates; program name, project start/ end date, amount of funds requested and project cost amount. Verify the information is correct.

- ***NOTE:*** Amount of Funds Requested and Project Cost textboxes are pre-populated with the Agency Allocation amount.

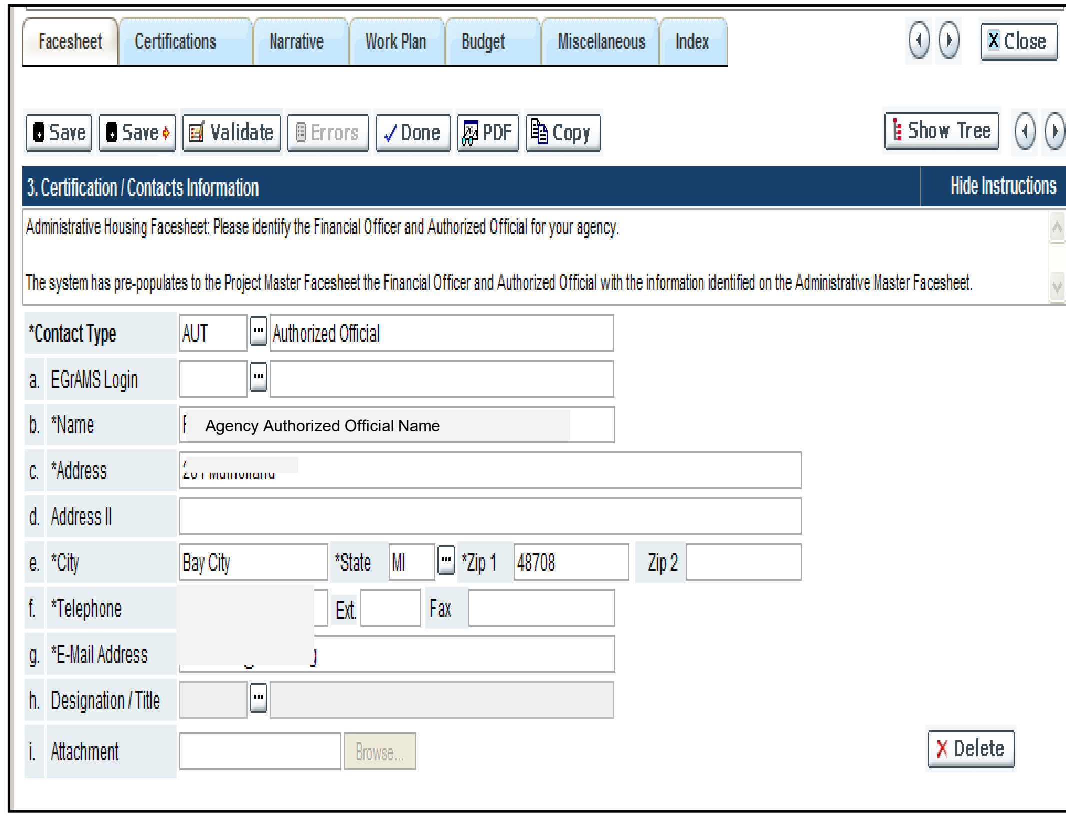
- If the information on the Program Information screen is incorrect, contact the MI E-Grants System Administrator for assistance.

- Click the 'Arrow' buttons to move forward or backward in the Application Facesheet tab.



3. Certification/Contacts Information

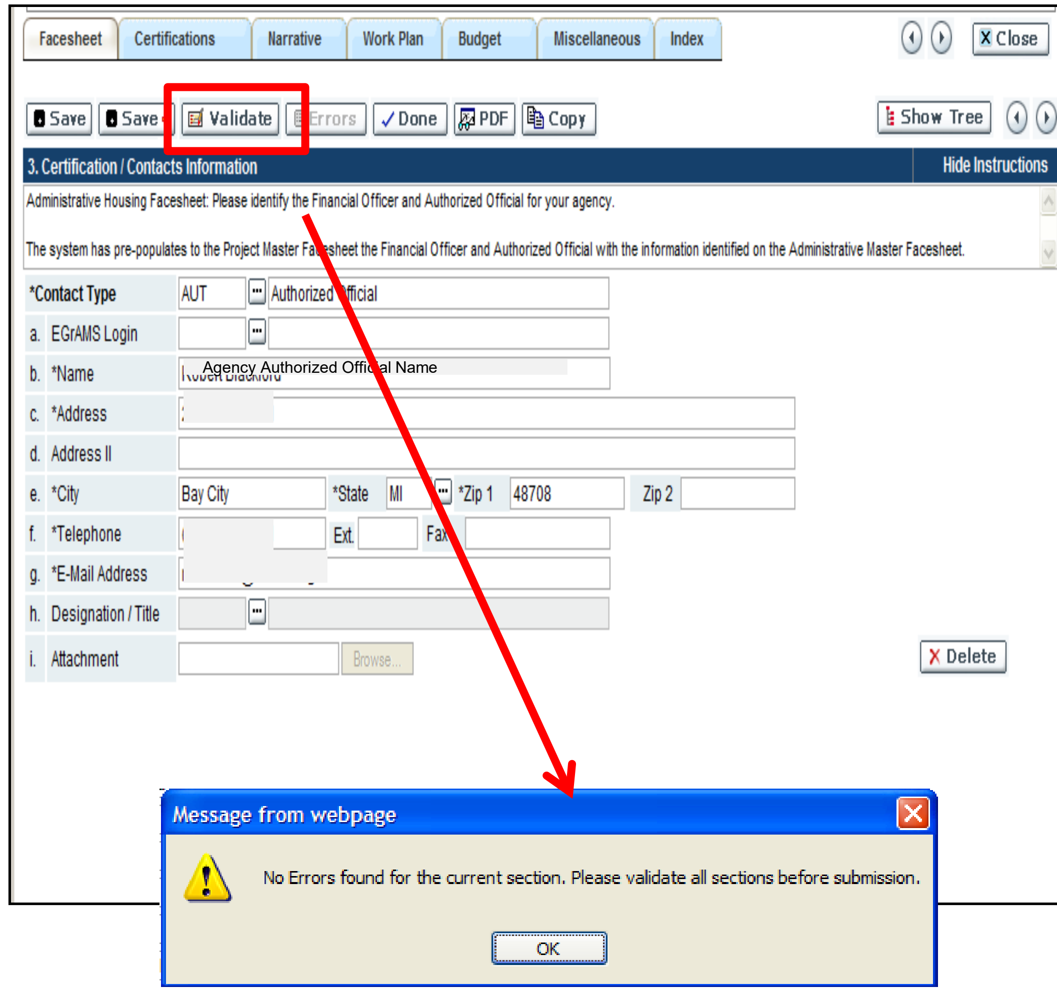
- A Project Director, Financial Officer, and Authorized Official must be identified for each application during this process.
- To Add required Project Contacts:
  - Select Contact Type, using the ‘Lookup’ icon.
  - Select EGrAMS Login, using the ‘Lookup’ icon. Check the box next to the name of the contact.
  - Remaining information will automatically populate.
  - Click the ‘Save’ button to save the information. Upon saving, the system will bring up a blank Contact Information screen. When done, click on the Certifications tab.



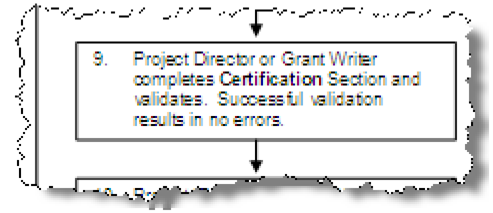
***NOTE**:* If a User is <u>not</u> listed on the ‘Lookup’ menu, contact the MI E-Grants System Administrator for assistance. Do <u>NOT</u> add Users manually.

Facesheet Section Tab Validation

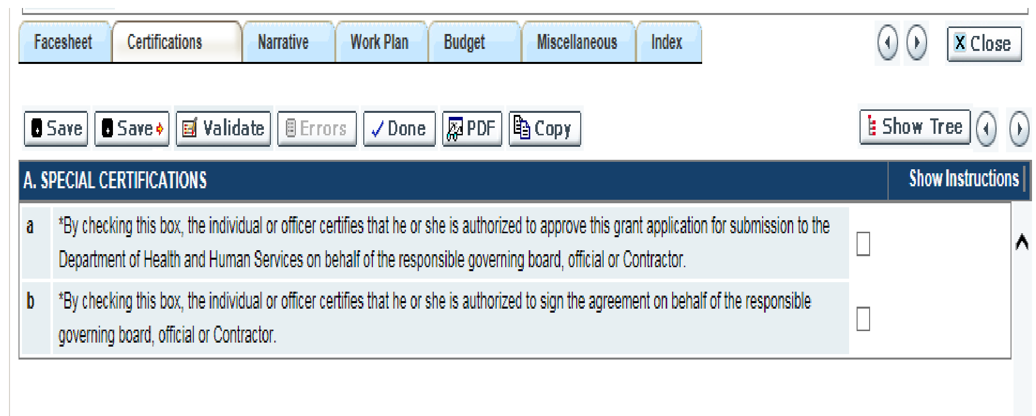
- After completion of each section tab, the User should click the ‘Validate’ button to check for errors before moving on to the next section tab.
- Click the ‘Validate’ button.
- The system will refresh and an information message will appear on the screen.
- This example has ‘No errors found for the current section’. If errors had been detected, the ‘Errors’ button would be enabled. The User clicks on the button to view a list of errors requiring correction.
- Click the ‘OK’ button.
- Click the ‘Arrow’ buttons to move forward or backward in the application.



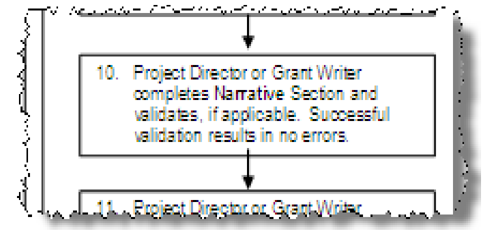
Certifications Section



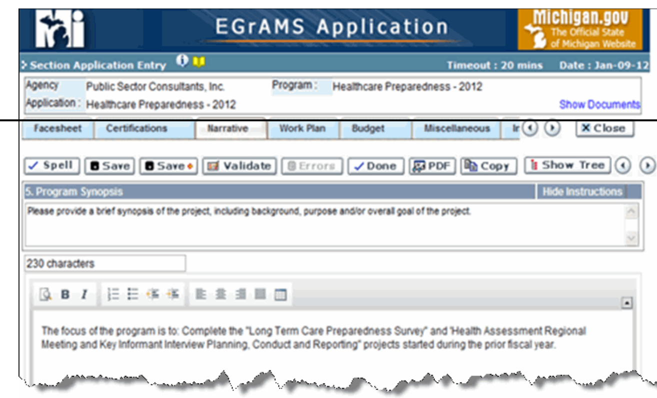
- All applications contain the Special Certification section. Additional certification statements unique to the individual programs may also be displayed.
- Read and confirm the ‘Special Certifications’ statements as shown.
  - A marked check box is treated as ‘Yes’,
  - Unmarked check boxes are treated as ‘No’ and will result in validation errors.
- Click the ‘Save’ button to save the information.
- Click the ‘Validate’ button to check for errors in the Certifications section tab.
  - If No Errors are found, move forward using the ‘Arrow’ button.
  - If Errors are found, make the correction and Save the changes.
- Click the ‘Validate’ button to re-validate the section tab. Repeat this step until no errors are found.



Narrative Section

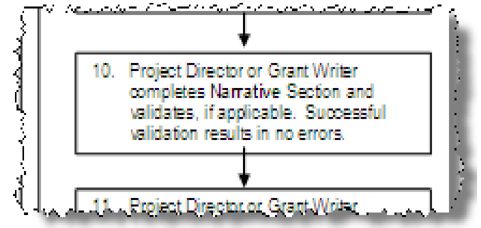


- The application Narrative contains requirements related to the program service area.
- **5. Program Synopsis**
  - The synopsis instructions state: Please provide a brief synopsis of the program, including background, purpose and/or overall goal of the project.
  - Type (or cut and paste from a Word doc.) the program synopsis into the provided textbox.
  - Use the optional Toolbar buttons to format the synopsis entry.

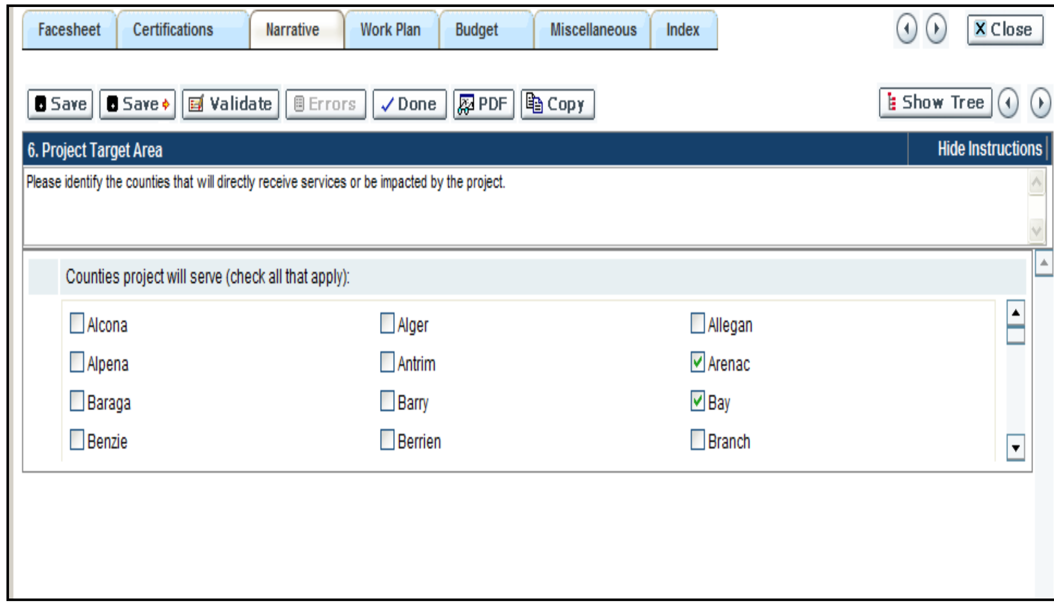


- The Toolbar is divided into four sections. Each section has a variety of buttons:
  - Section 1: Preview; Bold and/or Italic text.
  - Section 2: Numbered or Bulleted list; Increase/Decrease Indent.
  - Section 3: Text Alignment; Insert Table Properties.
  - Section 4: HTML Source.
- Click the ‘Save’ button to save the information.
- Click the ‘Validate’ button to check for errors in the Narrative section tab. If there are no errors, move forward.

Narrative Section

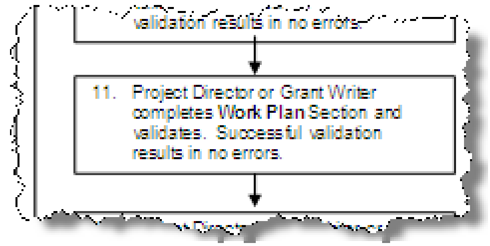


- The application Narrative contains requirements related to the program service area.
- **6. Program Target Area**
  - Check **all** counties or areas on the list that are included in the service delivery area.
- Click the 'Save' button to save the information.
- Click the 'Validate' button to check for errors in the Narrative section tab:
  - If no Errors are found - move forward using the 'Arrow' button.
  - If errors are found, make the correction(s) and Save the changes.
- Click the 'Validate' button to re-validate the section tab. Repeat this step until the section tab reports no errors.



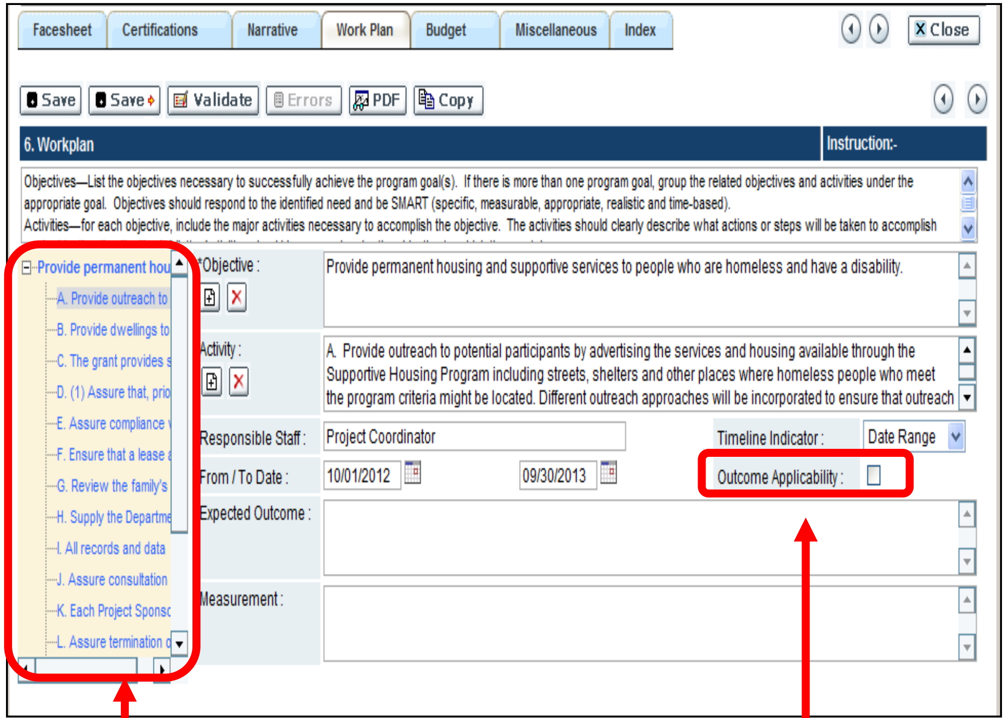
NOTE: Do not check every box – there are 84 choices on this list – selecting all 83 counties plus 1 (out Wayne) will result in a validation error.

Work Plan Section Overview



- The Application Work Plan contains: Objective and Activity information for the selected program. These are the Statement of Work included in the Agreement.
- Progress reporting associated with the program is based on the submitted Work Plan.
- **Objective:** Enter an Objective in the textbox provided.
- **Activity:** Enter an activity associated to that Objective in the textbox provided.
- **Responsible Staff:** Identify and enter responsible person/party for this activity.
- **Timeline Indicator:** Select Date Range/Date using the dropdown. Then enter the actual date information:
  - **Date Range** (default): Enter the timeframe associated with completing the activity in the From/To Date fields, using the Calendar Lookup.
  - **Date:** Use this option to enter the date of an event (i.e. conference, seminar, etc.) in the From field, using the Calendar Lookup.

  NOTE: If the reporting of outcomes are required, check the Outcome Applicability box and proceed to Expected Outcomes and Measurement textboxes.
- **Expected Outcomes:** Enter the expected outcome for this Activity.
- **Measurements:** Enter the measurement that will be used to indicate that the outcome has been achieved.



Check Outcome Applicability if Expected Outcome and Measurement is entered.

System displays all Objectives and Activities entered in a tree structure.

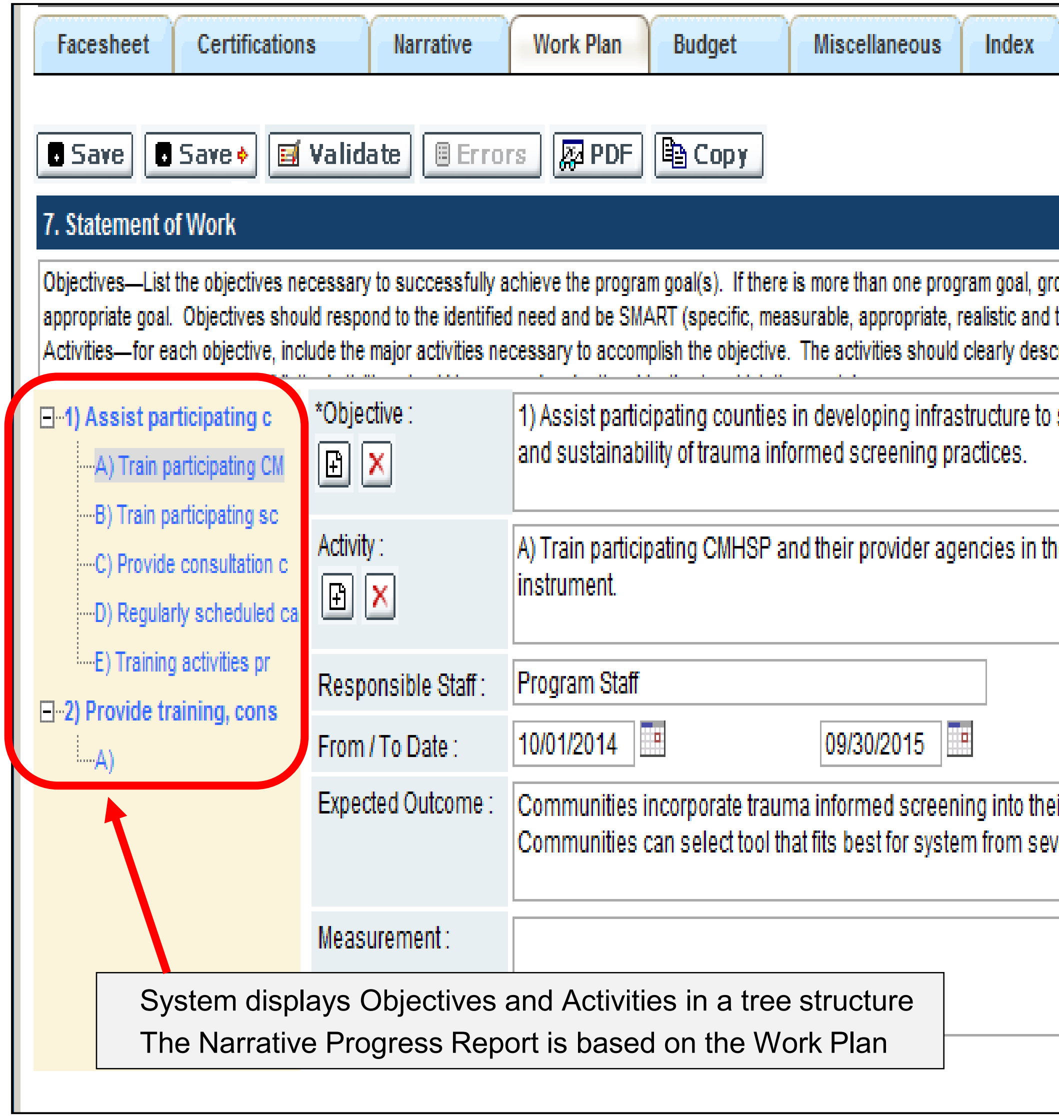
Work Plan Section Completion Instructions

- The User can enter multiple activities to the work plan by following these steps:
  - **Objective:** Click on the add icon. Enter the first Objective in the textbox provided.
  - **Activity:** Click on the add icon. The system will show a blank activity box. The Grantee can begin entering the Activity for that Objective.
  - Click the 'Save' button to save the newly entered information. Save after each newly entered Objective and Activity.
  - Repeat this process for each additional Objective and Activity.

  ***NOTE:** Use an alpha-numeric system for easier tracking of Objectives and Activities*

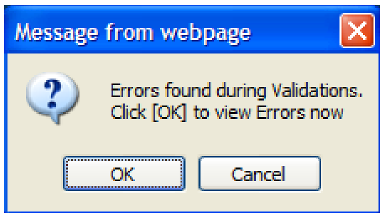
- To delete an Activity associated with an Objective, follow these steps:
  - Activity: Click on the Delete Icon. The system will pop-up and confirmation message asking "Do you wish to delete this Activity?"
  - Click OK to delete.
  - Click Cancel to discard request.

  ***NOTE:** All Activities associated with the Objective need to be deleted first prior to deleting an Objective.*

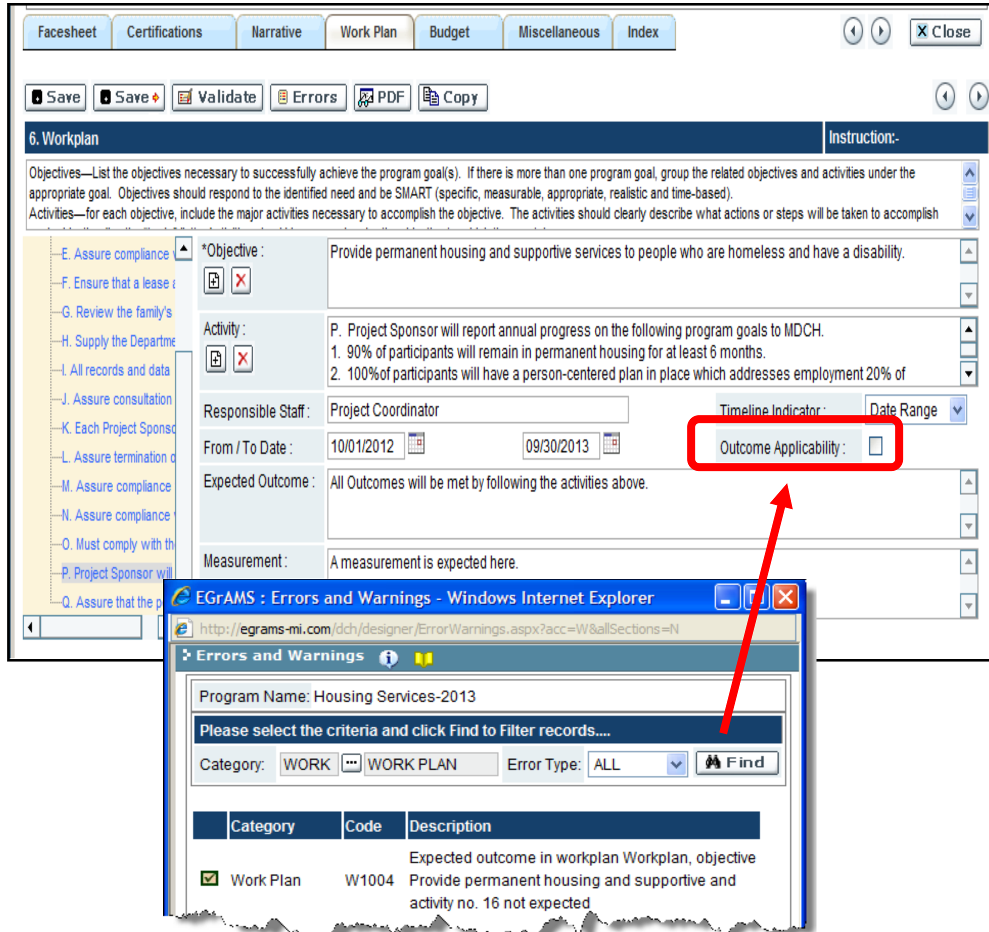


Work Plan Section Tab Validation

- After completion of each Section tab, the user should click the ‘Validate’ button to check for errors before moving on to the next section tab.
- Click the ‘Validate’ button.
- The system will refresh and an information message will appear on the screen. This example has ‘Errors found during Validation’:



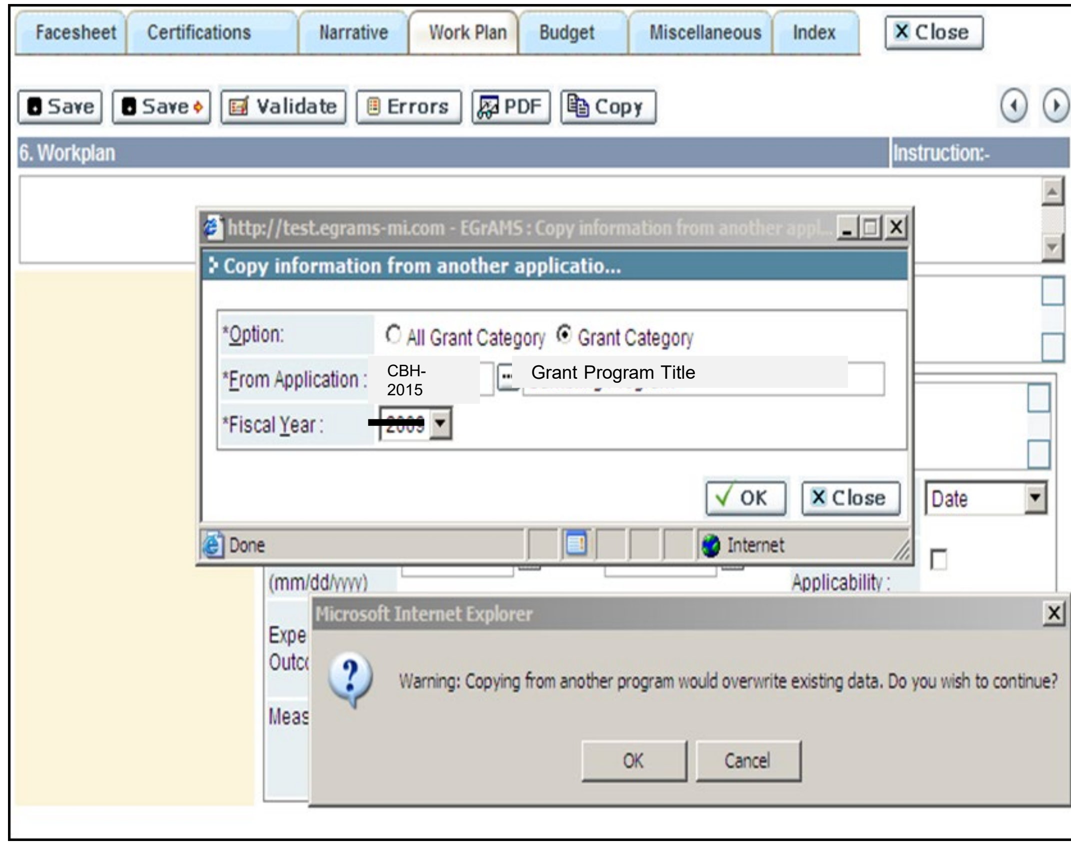
- Click the ‘OK’ button. An Error pop-up window will open, displaying the found errors during validation.
  - Make the correction and save the changes, by clicking the ‘Save’ button.
- Click the ‘Validate’ button to re-validate the section tab. Repeat this step until the section tab reports no errors.
- Click the ‘Arrow’ buttons to move forward or backward in the application.



In this example, the User needs to either check the Outcome Applicability box or remove the Expected Outcome and then Save in order to remove the validation error.

Work Plan Section - Copy Functionality

- The ‘Copy’ button allows users to copy sections of a previous grant application to the current grant application. This function copies the entire section, and should only be done prior to making edits. Using this function after editing will replace the edited information with the prior year’s information.
- The User can copy Objectives with associated Activities by following these steps:
  - Click the ‘Copy’ button to copy information from a previous grant application.
  - The ‘Copy information from another application’ pop-up window will open.
    - Select the ‘From Application’ using the ‘Lookup’ icon.
    - ‘Fiscal Year’ will pre-populate
    - Click the ‘OK’ button to copy the information to this application.
  - The system prompt you a warning message:
    - Click ‘OK ‘ to continue with the copy.
    - Click ‘Cancel’ to discard the copy.
  - The ‘Copy information from another application’ pop-up window will refresh.

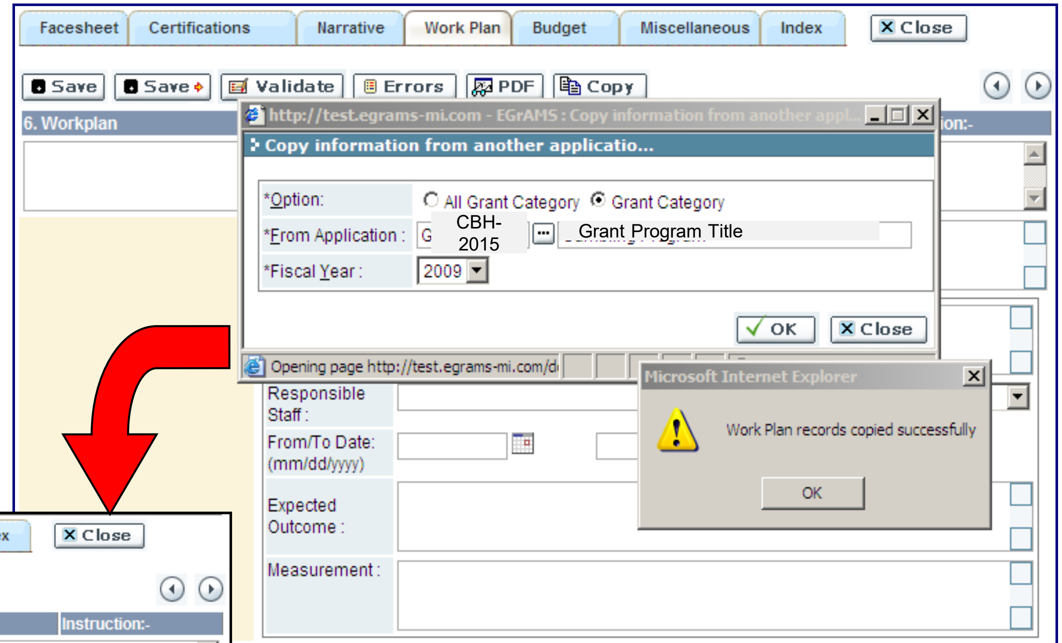


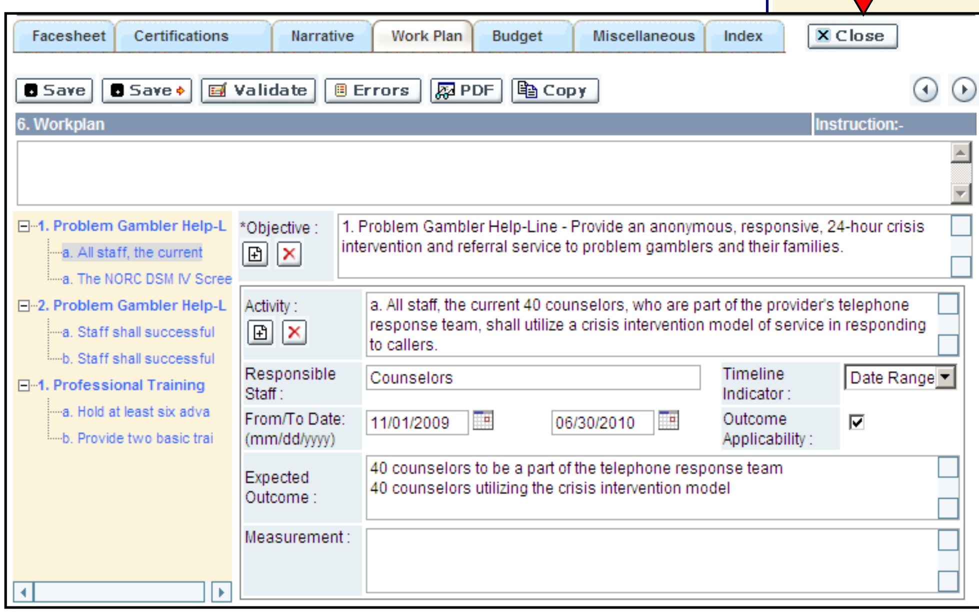
Work Plan Section – Copy Functionality

- Complete the copy process by following these steps:

  - A information message will appear, informing the user the records copied successfully. Click the ‘OK’ button.

  - Click the ‘Close’ button on the ‘Copy information from another application’ pop-up window. The system will refresh and the copied section will appear.





  - Edit the copied section as needed.

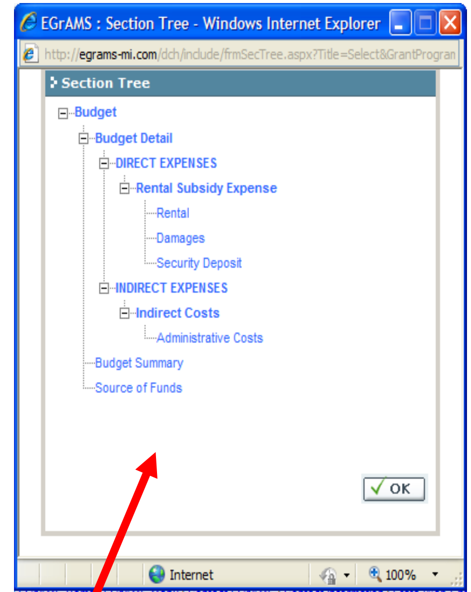
  - Click the ‘Save’ button to save after each edited objective and/or activity information.

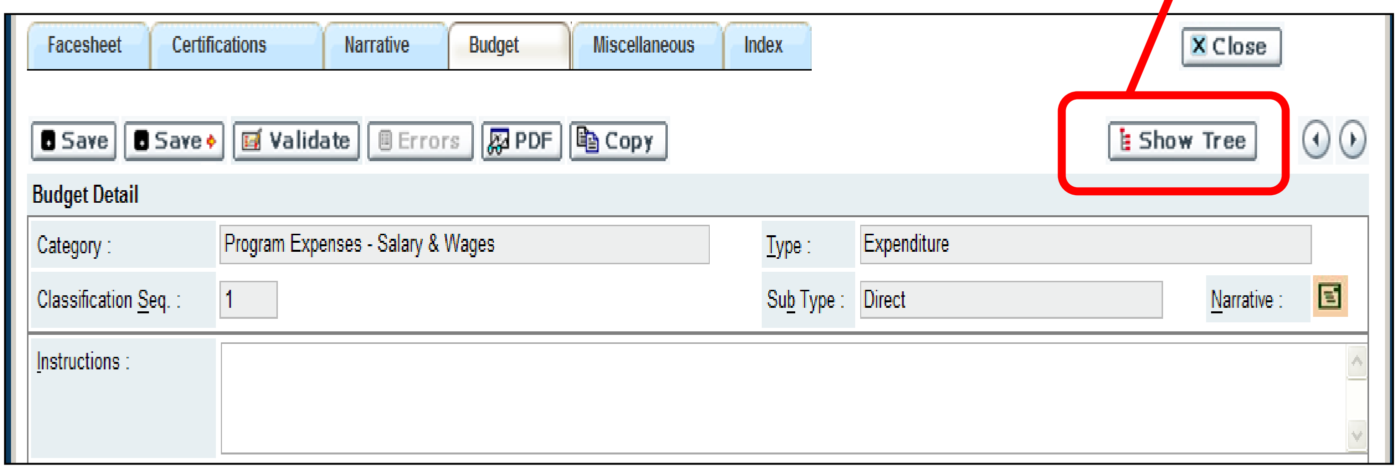
NOTE: *The ‘Copy’ button function can be used on any section of the grant application, but we recommend you use this function for the Narrative, Work Plan and Budget sections only.*

Questions?

Understanding the Budget

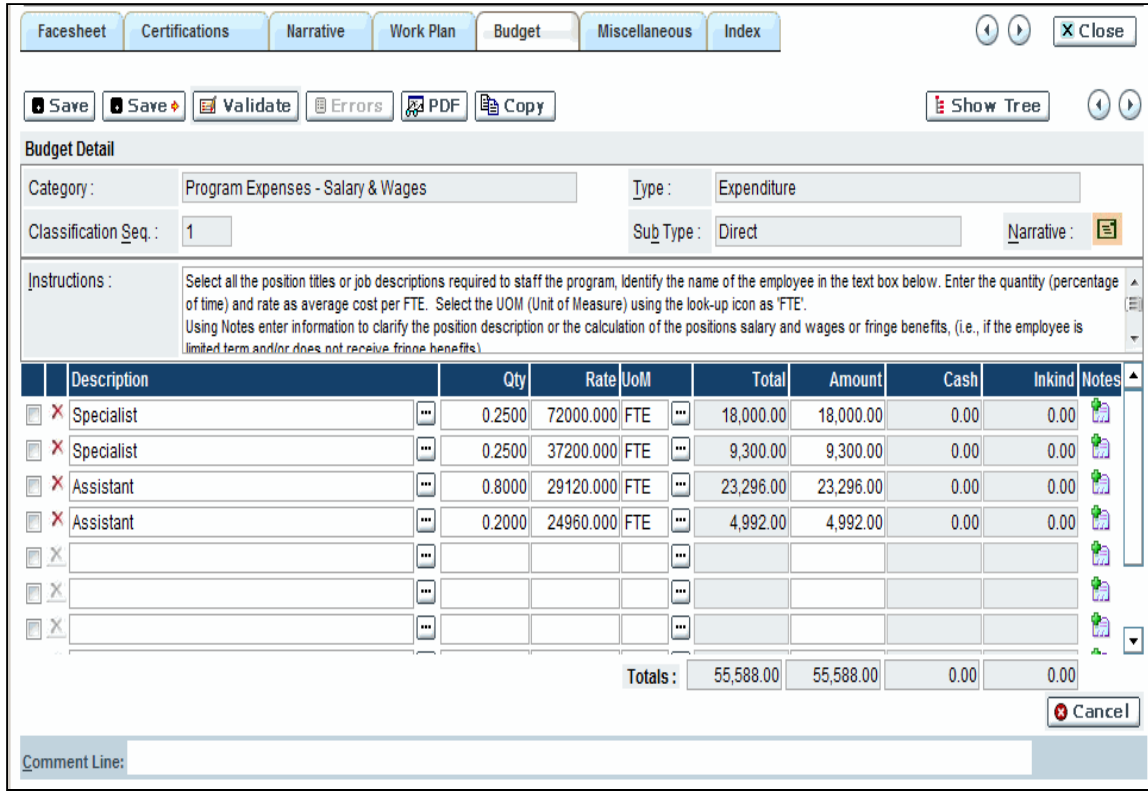
- **Show Documents:** Contains agreement-related and instructional documents.
- **Show Tree:** A navigation tool that assists the grantee in moving to a specific budget category screen by clicking on the link and clicking the 'OK' button.
- **Category:** Displays the name of the Budget Category currently open.
- **Type:** Shows the Budget Type as either Expenditure or Source of Funds.
- **Sub Type:** Shows the applicant the type of Expenditure as either Direct or Indirect.
- **Narrative:** Memo field for recording budget narrative descriptions.
- **Instruction:** Provides specific budget category definitions and instructions. To view the instruction use the scroll bar on the right side of the instructions box.





Quantity X Rate X Unit of Measure Budget Entries

- This budget configuration is used for reporting Salary and Wage categories and requires the Grantee to complete the following fields:
  - **Description:** Select the position Title, using the 'Lookup' icon. If position not available, select 'Other' and type the position title in the space provided.
  - **Qty:** Enter the number of positions required for the program corresponding to the specific position description.
  - **Rate:** Enter the total salary cost based on 1 FTE.
  - **Unit of Measure (UoM):** Select FTE (i.e. full-time employee or full-time equivalent) for unit of measure for each position description.
  - **Notes:** Enter information to clarify the position description or the calculation of the position salary and wages.
- Click the 'Save' button to save changes or 'Save->' to save and advance.



> **Description:** The Grantee selects Accountant for the title. **Quantity (QTY)** was expressed as a decimal (FTE) of .40. **Rate:** The Grantee entered the total salary cost for this position description. **UoM:** The Grantee selected FTE (full-time employee or full-time equivalent).

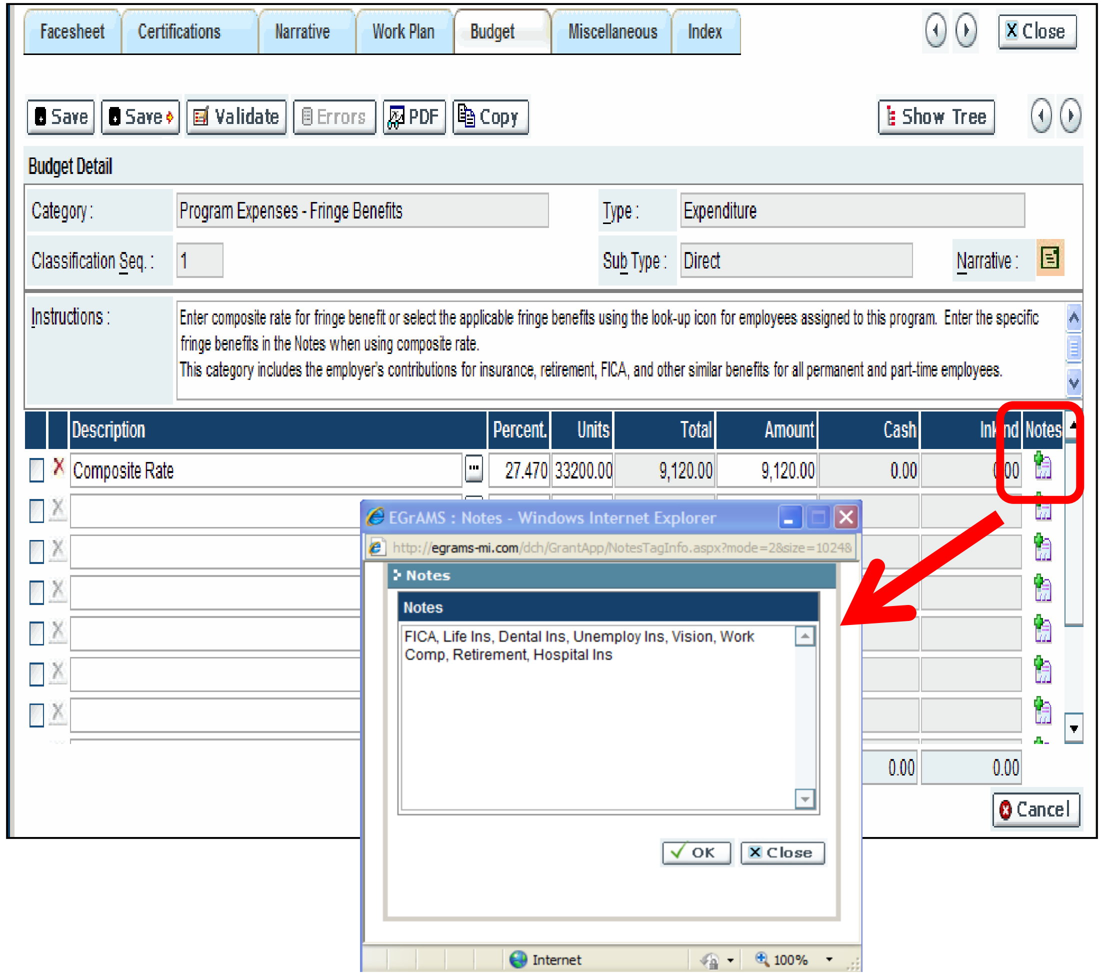
Percentage X Unit of Measure Budget Entries

- This budget configuration is used for reporting Fringe Benefit categories and requires the Grantee to complete the following fields:

- **Description:** Select the fringe benefits description, using the 'Lookup' icon.
- Benefits can be listed as:
  - Individual fringe benefits
  - Composite Rate
  - All Composite Rate

NOTE: If Composite Rate is selected, the Grantee ***must*** identify the benefits included in the 'Notes' icon. All Composite Rate does not require notes, as it implies that all fringes are provided.

- **Percent:** Enter the percentage of the specific fringe benefits.
- **Unit:** The system will pre-populate the Salary & Wage total. (If changes are made in Salary & Wages after entering the fringe benefits, verify that the units reflect the correct Salary & Wages total. If incorrect enter the correct amount.).
- Click the 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

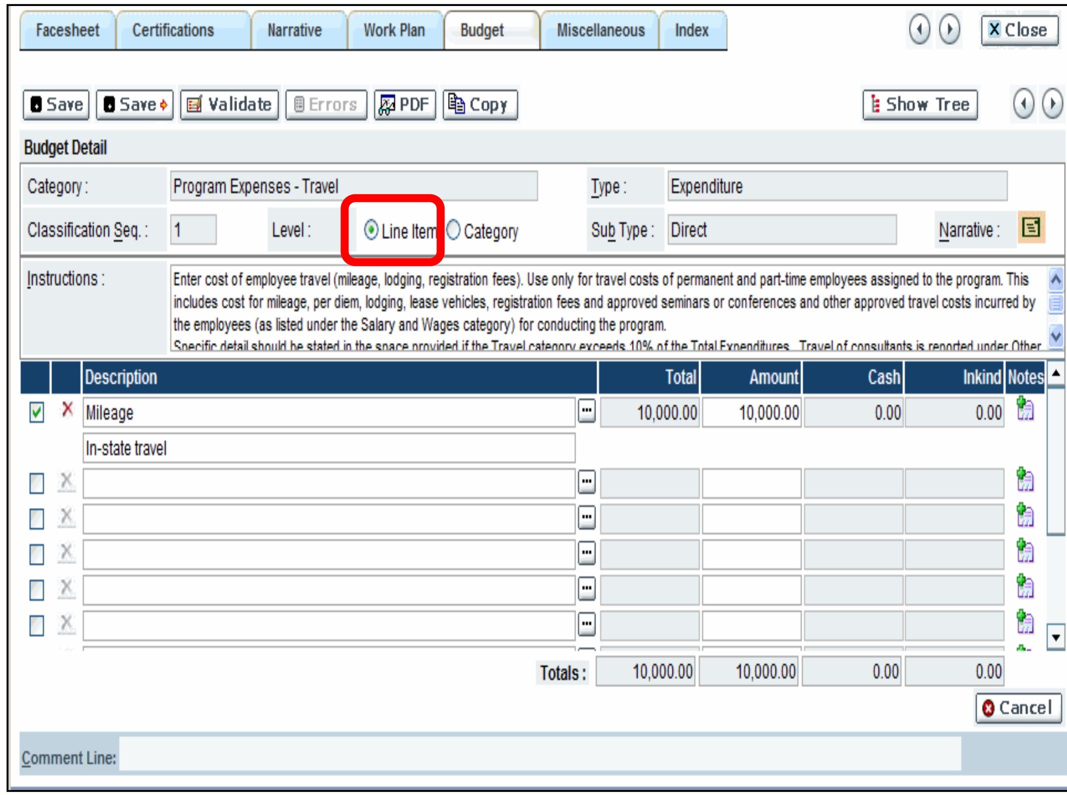


The applicant selects Composite Rate for the description. **Percentage** (Percent) entered 27.47%. The system automatically calculates the total amount of Fringe Benefits.

"Line Item" Budget Entries

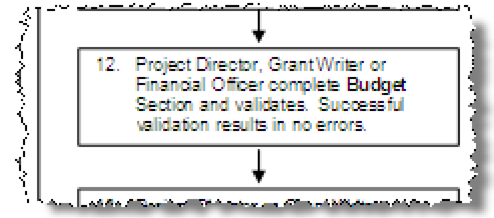
- The 'Line Item' selection is used when the expenses in this budget category **equals 10% or more** of the total budget for: Travel, Supplies and Materials, and Other Expense categories only. Failure to use this selection when the expenses exceed 10%, will result in a budget Validation error.
- To complete, the Grantee completes the following fields:

- **Description:** Select the travel description, using the 'Lookup' icon. If travel expense not available, select 'Other' and type in name of the travel expense.
- **Amount:** Enter the total amount of the travel expenses of the permanent and part-time employees assigned to the program.
- **Notes:** Enter information to clarify the travel cost description or the calculation of the travel cost (i.e., if the employee reimbursement for mileage 800 miles @ $0.42 a mile).
- Click the 'Save' button to save changes or 'Save->' button to save and advance to the next screen.



The applicant selected Mileage for the descriptions and entered the type of mileage in the text box below. **Amount:** The applicant entered the total travel cost for their permanent or part-time employees.

Budget "Category" Entries

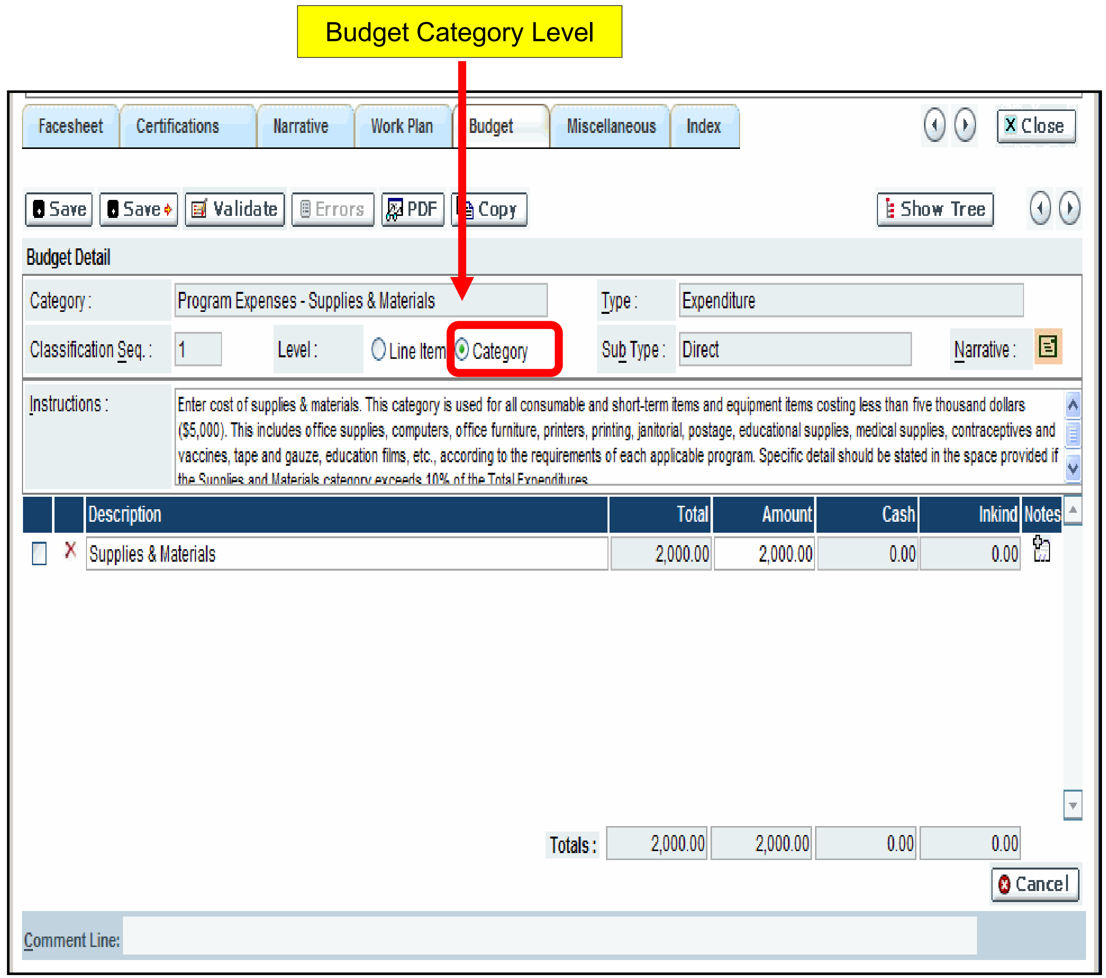


- The 'Category' selection is used when the expenses in this budget category **equals less than 10%** of the <u>total budget</u> for: Travel, Supplies and Materials, and Other Expense categories <u>only</u>. The grantee may opt to enter only the subtotal amount for the category.

- To enter a Category budget:
  - Select the 'Category' radio button.
  - The system changes its display to show the expense category in the description column.
  - Enter the amount budgeted.
  - The system computes and displays the Total column.

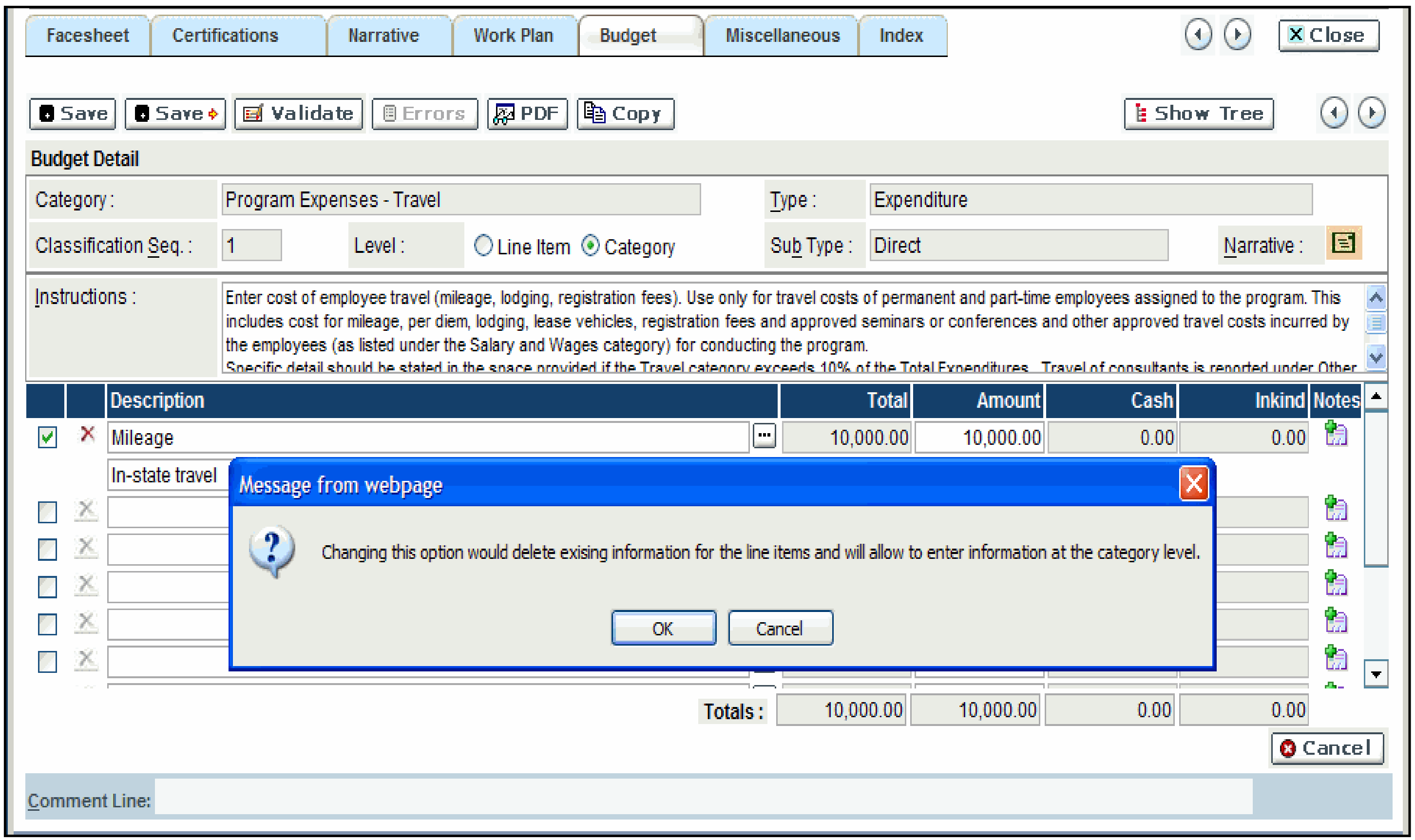
NOTE: *Grantee cannot enter multiple line items when budget category screen is set to 'Category.'*

- Click 'Save' button to save your changes or 'Save->' button to save and advance to the next screen.



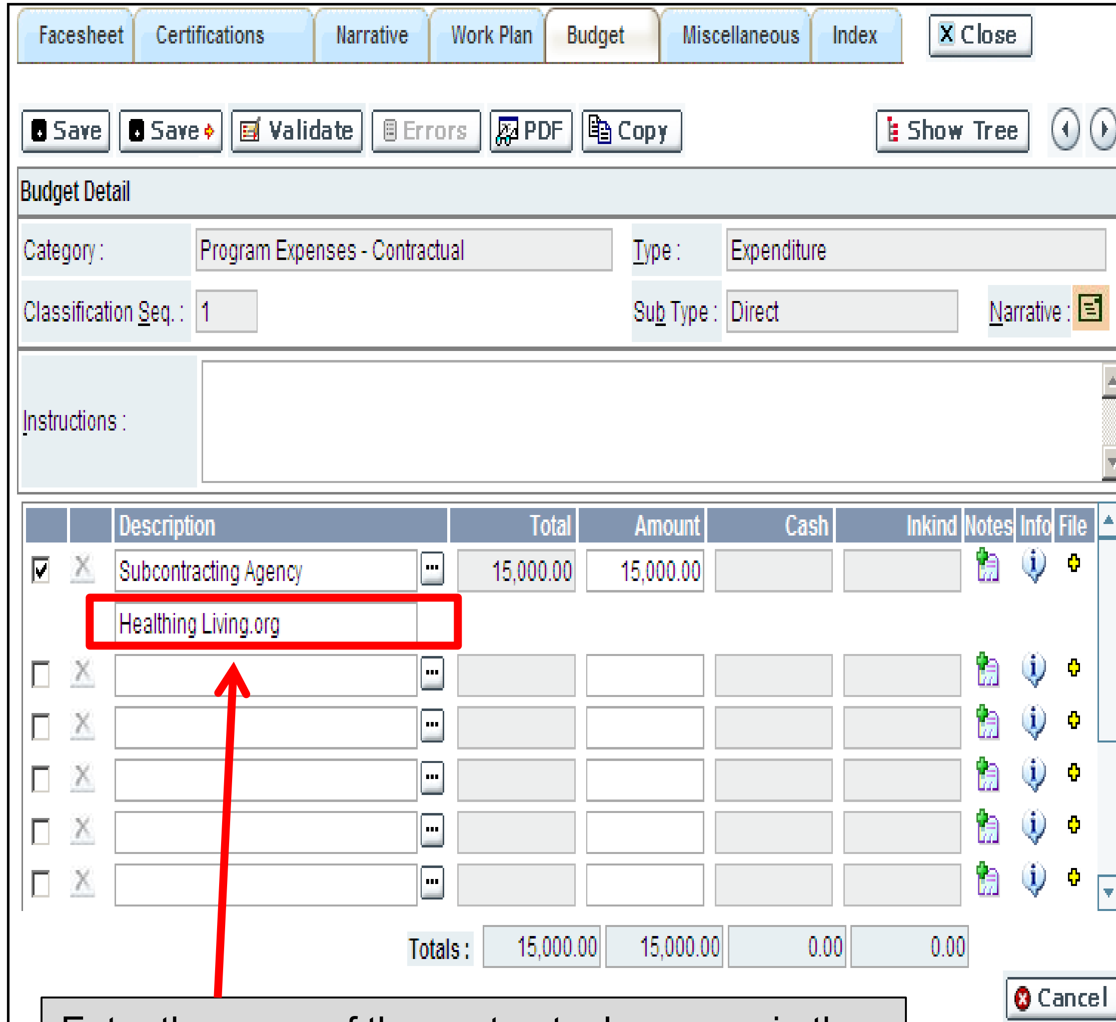
Budget Detail changing the Level from “Line Item” to “Category”

- **Important to Remember:** Changing the category budget level from a ‘Line Item’ to a ‘Category’ will delete existing entries, for this entry. To change, the Grantee completes the following fields:
- Level – Select ‘Category.’ The system will prompt the User to verify that this change is acceptable.
- Click the ‘OK’ button to move forward to a Budget Level: ‘Category.’
- Click ‘Cancel’ button to stay with the Budget Level: ‘Line Item.’



Additional Requirements Related to Subcontractors

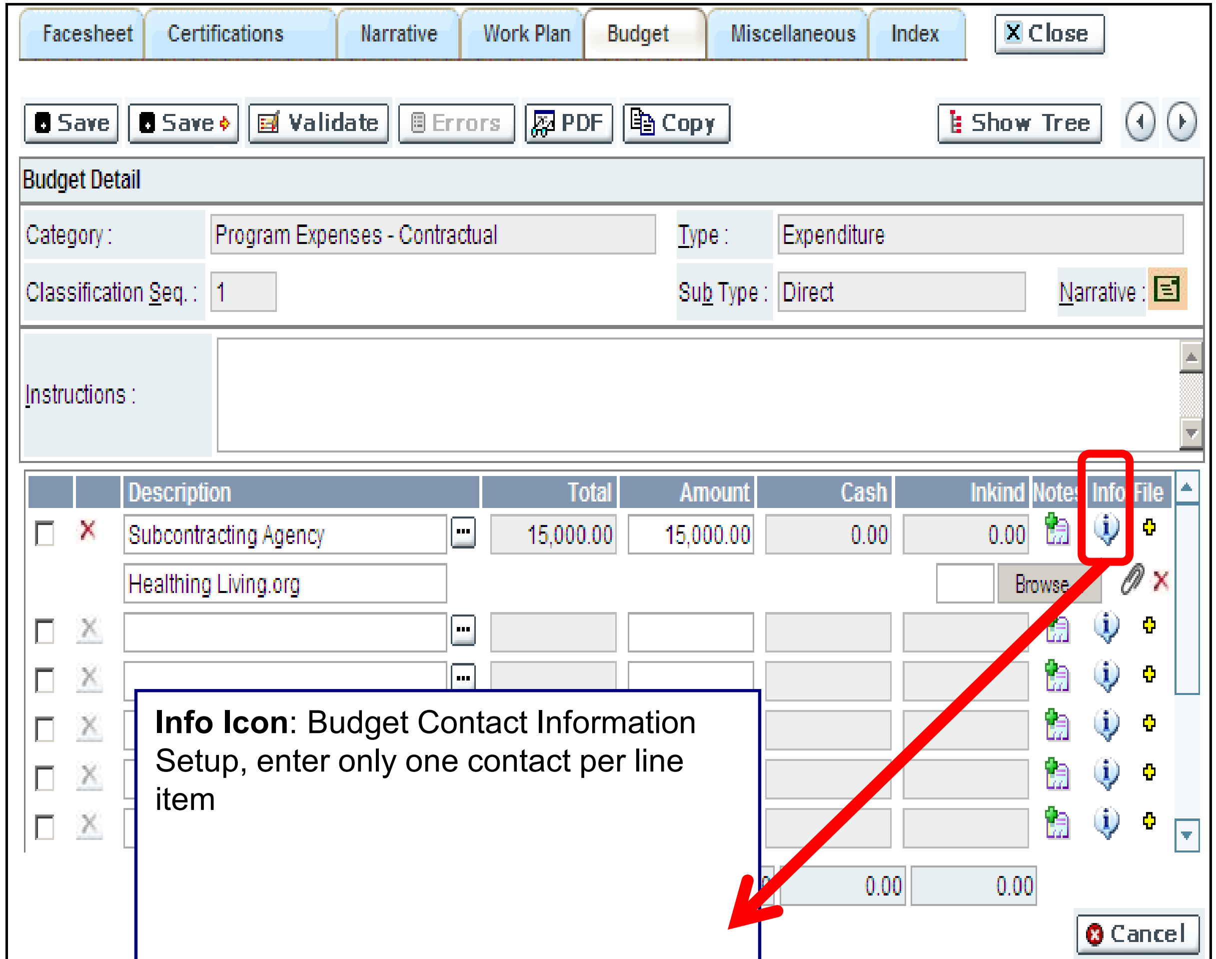
- When budgeting for subcontractors, the Grantee is required to complete the following fields:
  - **Description:** Select the contractual service description, using the 'Lookup' icon. Enter the name of the contractual expense in the textbox that appears below the line item. If an adequate description is not available, select 'Other' and type in the contractual service description.
  - **Amount:** Enter the total amount budgeted for each subcontractor/subrecipient.
  - **Notes:** Enter information to clarify the expense in the 'Notes' icon.
  - **Info:** Enter the subcontractor's/subrecipient's address information related to the contractual expense.
- Click the 'Save' button to save changes or 'Save->' to save and advance to the next screen.



Enter the name of the contractual expense in the textbox that appears.

Contractual – Understanding the Contractual Budget Icons

- **Info Icon** : Enter the Name and Address of the subcontractor or subrecipients in the Budget Contact Information Setup pop-up window – required.
- **File Icon** : Allows the applicant to upload a file, if applicable. Uploaded statements of work are required for subcontracts budgeted at or above $50,000.
- **Paper Clip Icon** : Allows for the ability to view the attached documentation.
- **Delete Icon** : Allows the applicant to delete attached documentation from a line item.

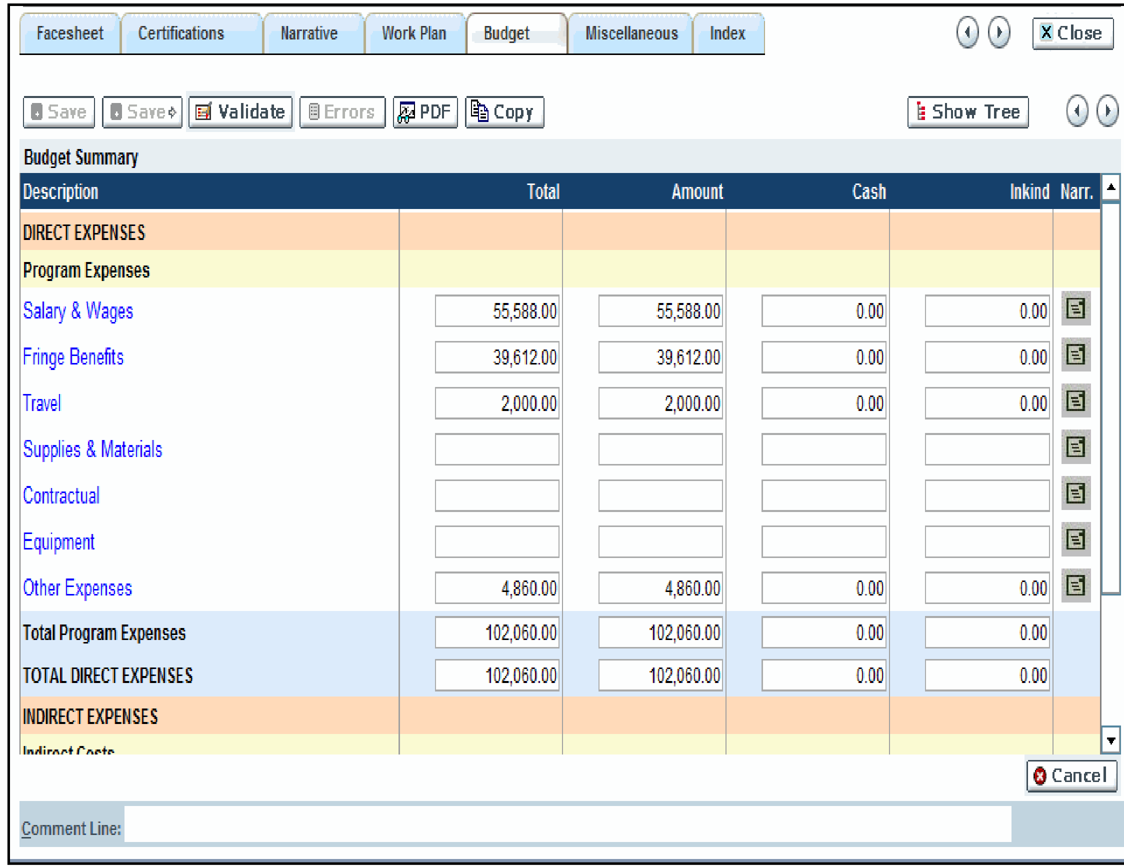


Info Icon: Budget Contact Information Setup, enter only one contact per line item

Budget Summary (second to last step of the Budget Tab)

- Click the ‘Show Tree’ button to select the Budget Summary (hyperlink) and the system displays the ‘Budget Summary’ screen. Grantee can click on the blue hyperlinks to move back to individual budget categories to make corrections.

- **Description:** Lists the budget expenses categories.
  - Click on the expenses category name to go to a specific budget category page to edit.
- **Total:** View the total amount of funds associated to a budget category.
- **Amount:** View the summarized state amount of funds associated to a budget category.
- **Cash and Inkind:** Are reported in the Source of Fund section of the budget.
- **Narrative Icon:** To view the expenses category narrative. This information is entered at the budget detail level, if required.
  - If no narrative has been entered for the respective expense category, the icon is disabled.

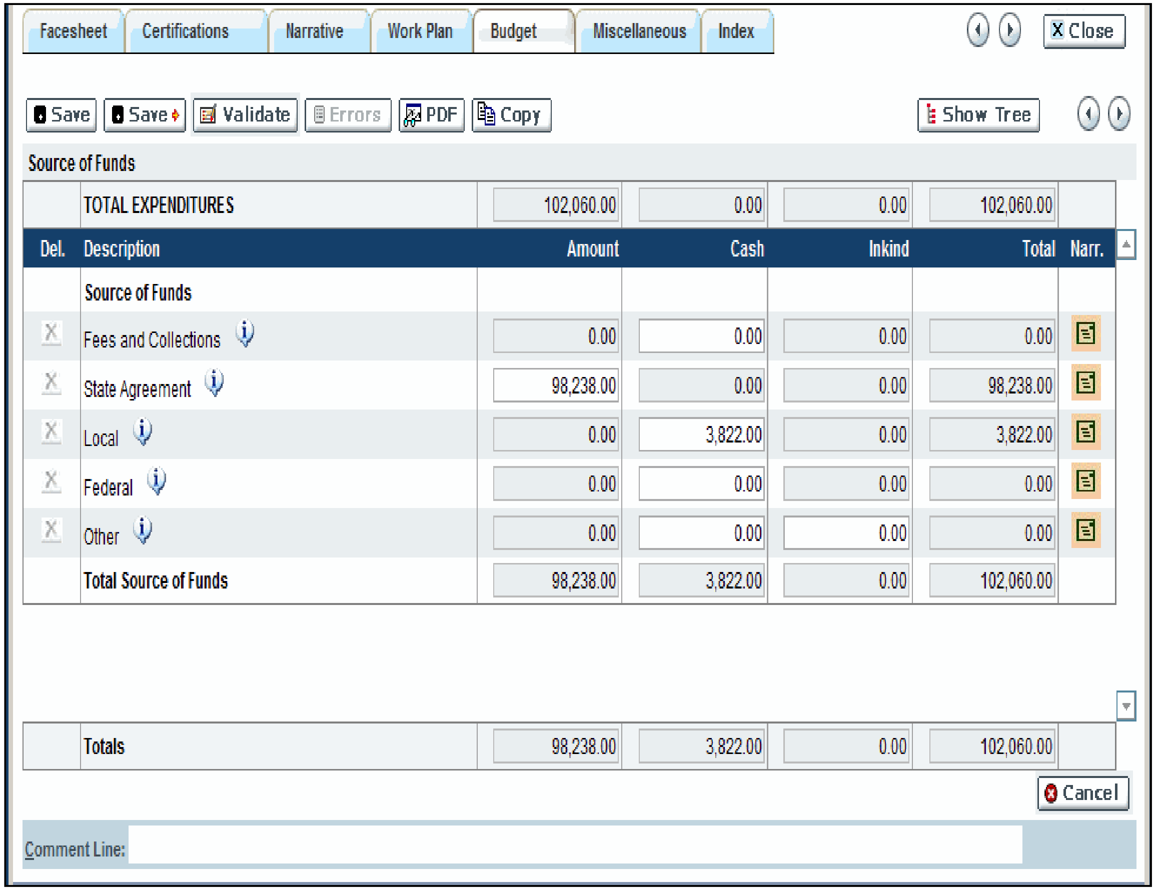


Description	Total	Amount	Cash	Inkind	Narr.
DIRECT EXPENSES					
Program Expenses					
Salary & Wages	55,588.00	55,588.00	0.00	0.00	
Fringe Benefits	39,612.00	39,612.00	0.00	0.00	
Travel	2,000.00	2,000.00	0.00	0.00	
Supplies & Materials					
Contractual					
Equipment					
Other Expenses	4,860.00	4,860.00	0.00	0.00	
Total Program Expenses	102,060.00	102,060.00	0.00	0.00	
TOTAL DIRECT EXPENSES	102,060.00	102,060.00	0.00	0.00	
INDIRECT EXPENSES					
Indirect Costs					

Source of Funds (last step of the Budget Tab)

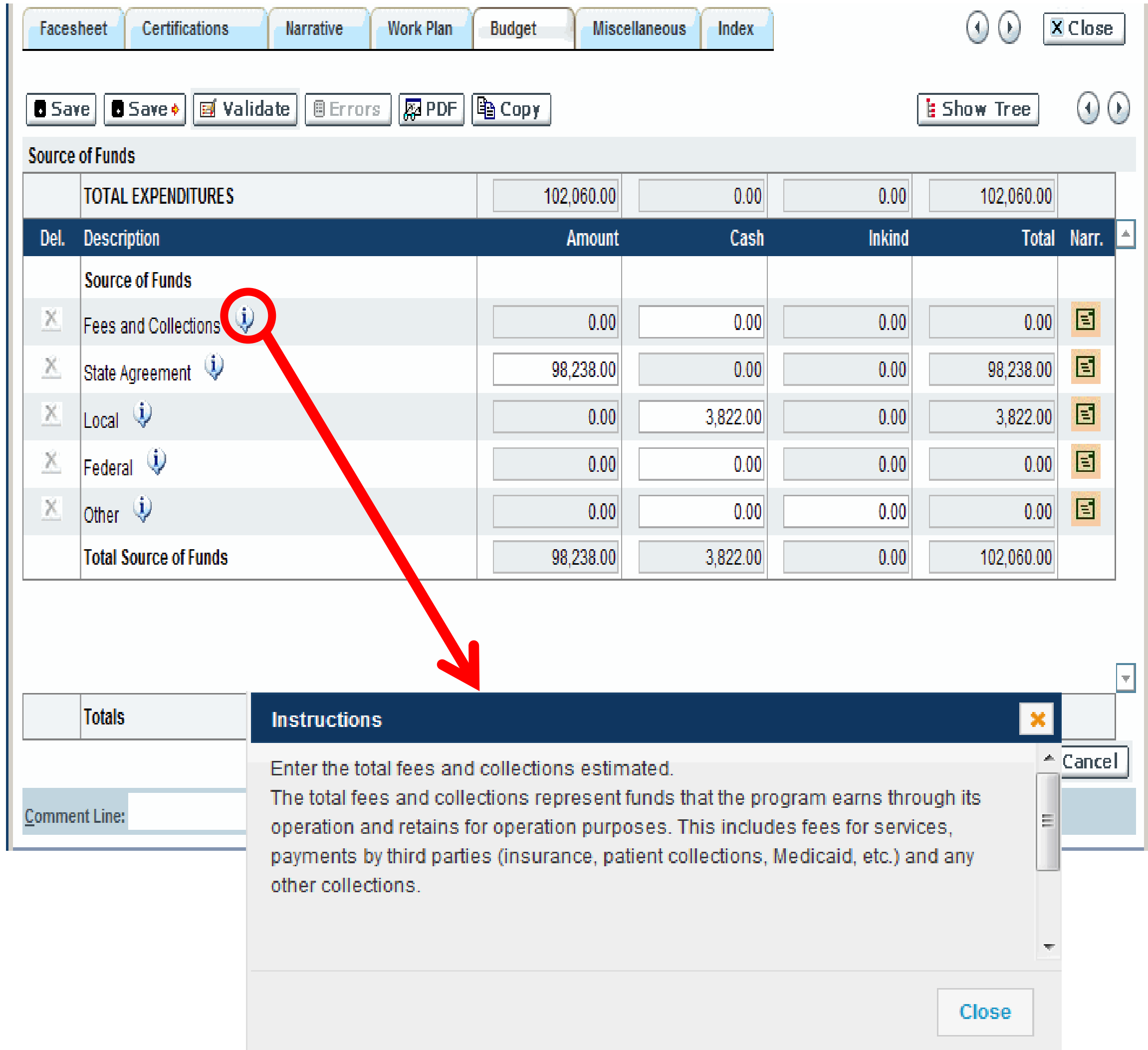
- Click the 'Show Tree' button to select the Source of Funds (hyperlink) and the system will display the 'Source of Funds' screen. The Grantee reviews, and if applicable, completes the following fields:

- **Source of Funds –** Refers to the various funding sources that are used to support the program. Funds used to support the program should be recorded in this section according to the following categories:
- **Total Expenditures –** The information is pre-populated from the Budget Summary of the total expenditures entered in the detail budget.
- **Fees and Collections –** Enter the total fees and collections estimated. The total fees and collections represent funds that the program earns through it operation and retains for operation purposes. This included fees for services, payments by third parties (insurance, patient collections, Medicaid, etc.) and any other collections.
- **State Agreement –** Enter the amount of MDHHS funding allocated for support of this program. This amount includes all state and federal funds received by the Department that are to be awarded to the Grantee through the Agreement.

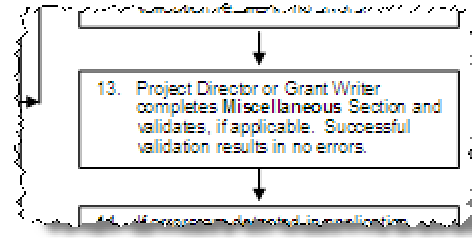


Source of Funds, cont'd

- **Local –** Enter the amount of Contractor funds utilized for support of this program. In-kind and donated services for other agencies/sources should not be included on this line.
- **Federal –** Enter the amount of any Federal grants received directly by the Contractor in support of this program and identify the type of grant received in the space provided
- **Others –** Enter and identify the amount of any other funding received. Other funding could consist of foundation grants, United Way grants, private donations, fund-raising, charitable contributions, etc. In-kind and other donated services should not be included unless specifically requested by MDHHS.
- **Total Source of Funds –** The system automatically calculated the total amount.
- Click the 'Save' button to save changes.
- Click the 'Validate' button to check for errors.



Miscellaneous Section



- This section allows the Grantee to add supporting documentation as an attachment, if required. Grantee completes these steps:

- **Attachment Title:** Enter the Title of the document that is to be attached. This should be short (less than 18 characters) and contain no special characters (#, $, %, etc.).

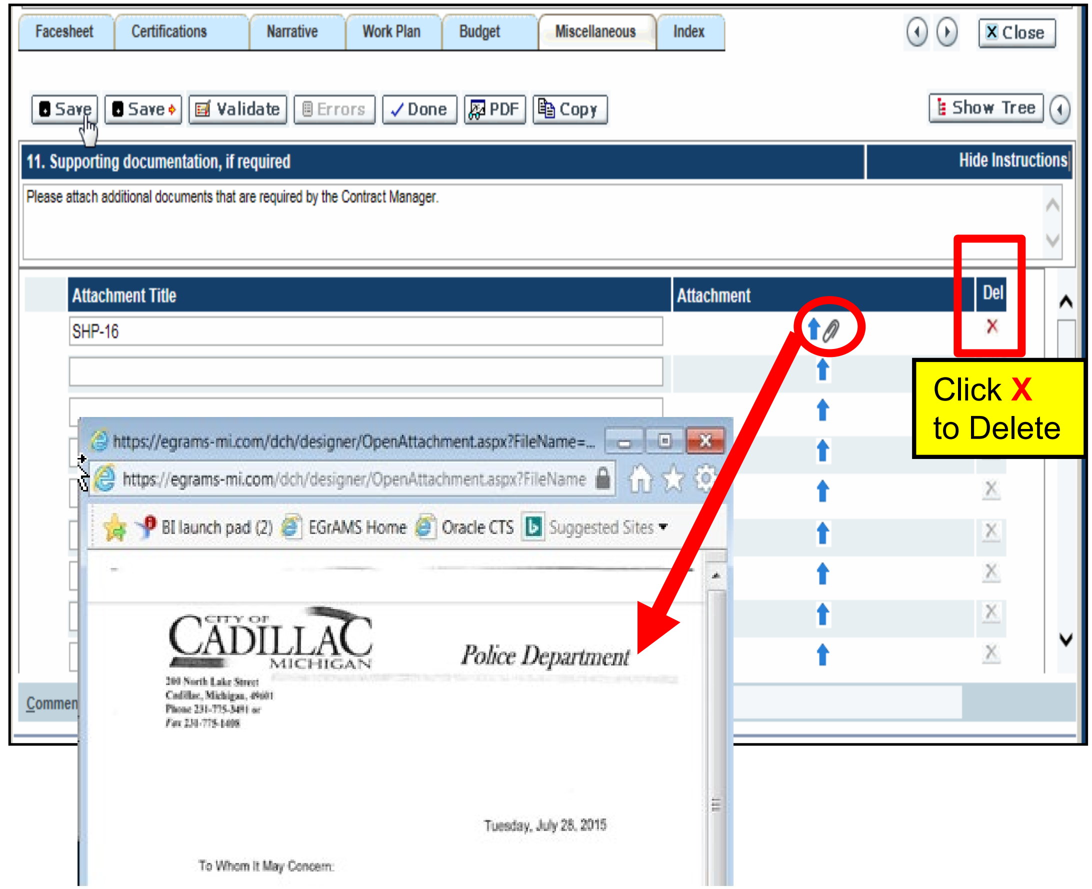
- **File Name:** Attach file from your local system using 'Browse' button. PDF files are preferred.
  - Navigate the file system on your computer to locate the file to attach.
  - Select the file. Click the 'Open' button.

- Click 'Save' button to save.

- To view the attachment, click on the 'paper clip' icon.
  - It's recommended to view each upload attachment, after it's been saved.

- To delete an attachment, click on the delete red 'X', and then click the 'Save' button.

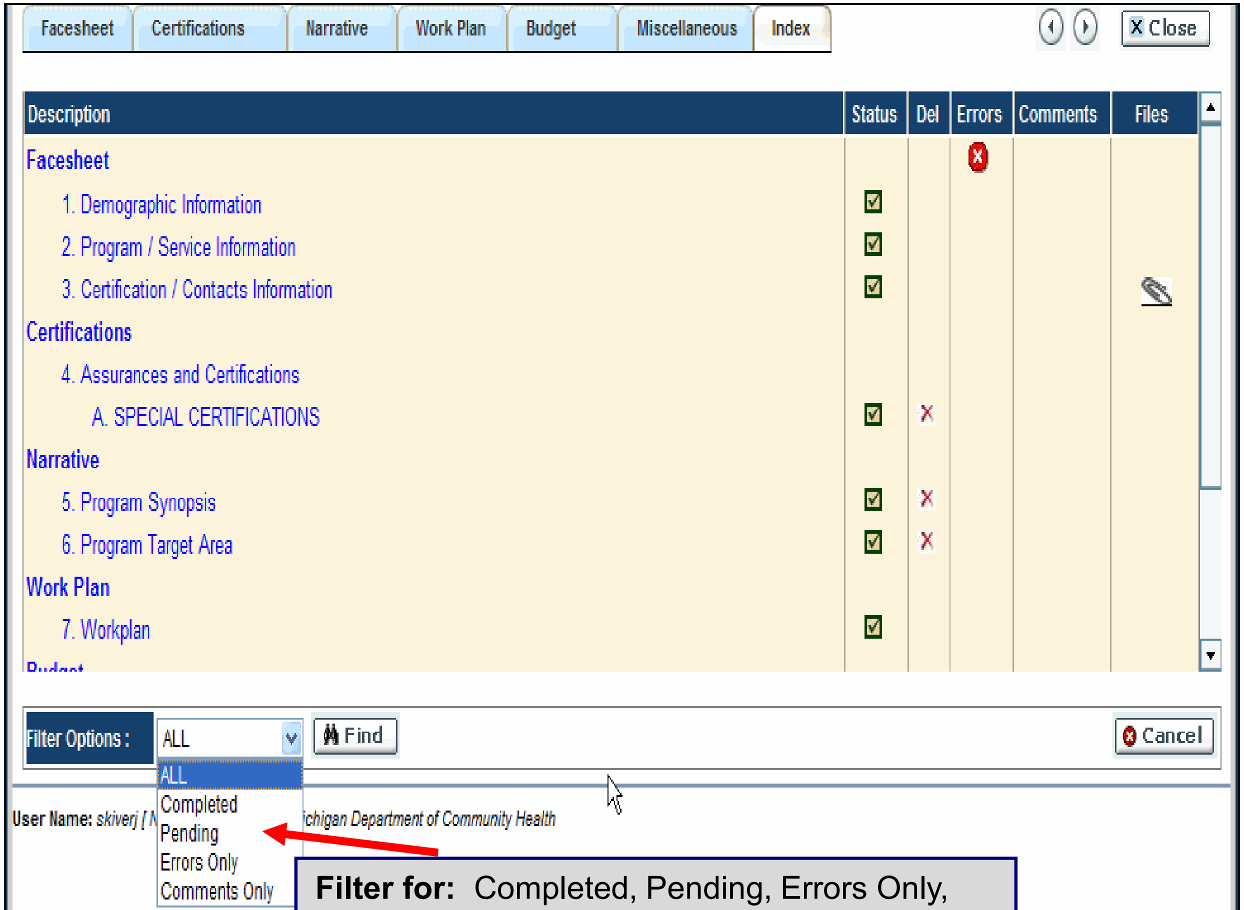
- Click the 'Validate' button to check for errors.



NOTE: This Section is for document attachments that will <u>not</u> be updated throughout the grant period and have <u>not</u> been added elsewhere.

Index Section

- This section allows the Grantee to review the application progress and identify outstanding errors.



Filter for: Completed, Pending, Errors Only, Comments Only Sections.
Click 'Find' button to make your selection.

- Display an index or table of contents of the entire application.
- Provides a summarized view of the entire application (errors, attachments, comments, etc).
- Click the blue hyperlink to go to a specific page within a tab section of the application (provided the User has access to the respective section).

Icons

Check Box (complete section).

Unchecked Box (incomplete section).

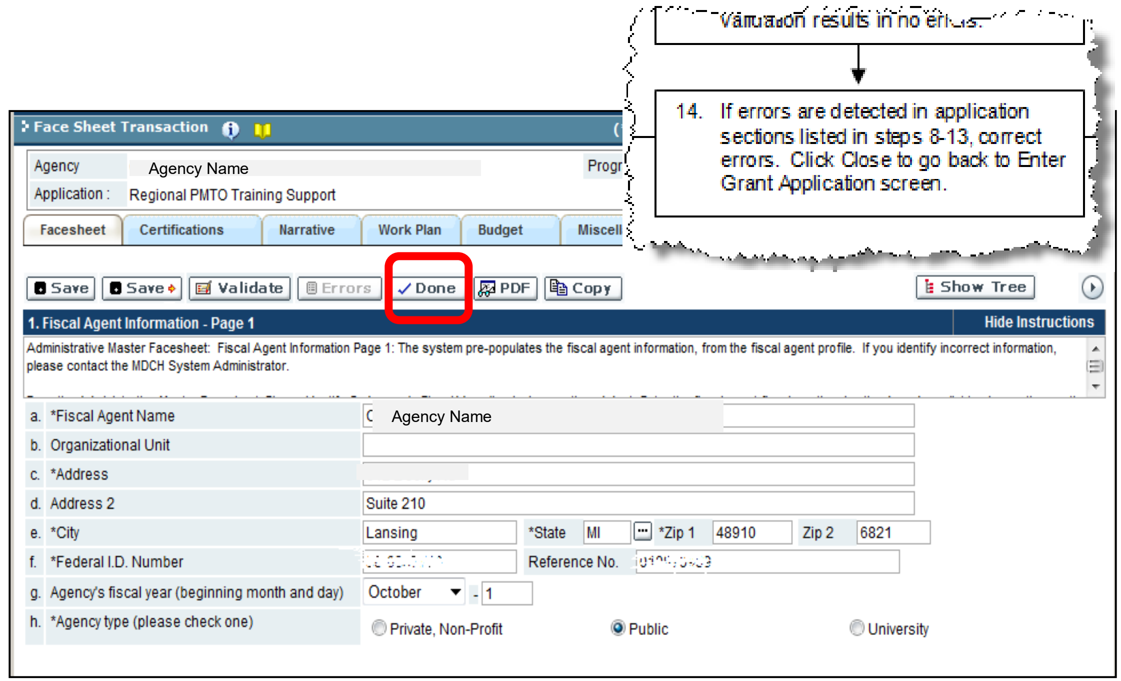
Delete button (delete the contents entered in this section).

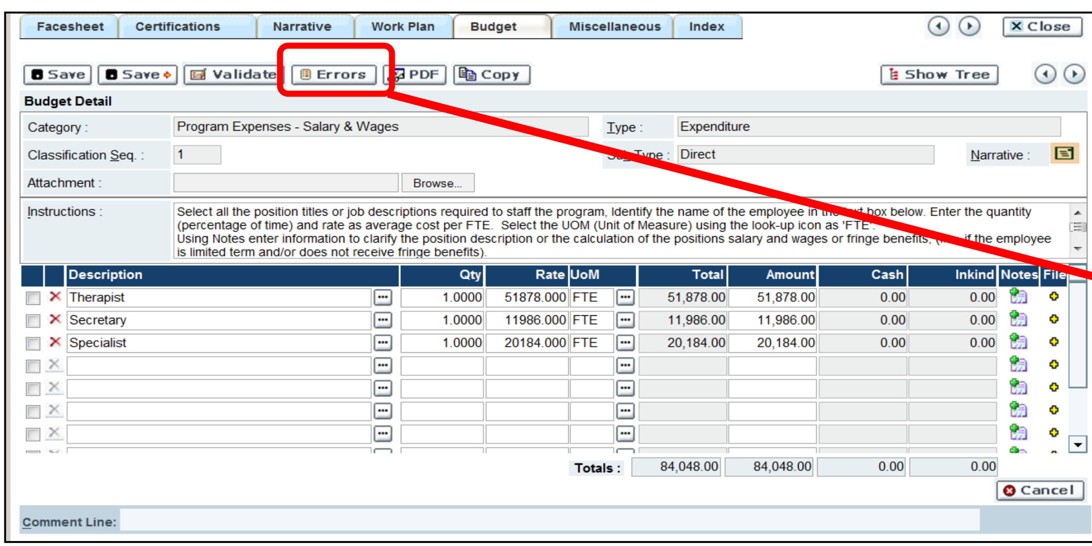
Error Button (open error window).

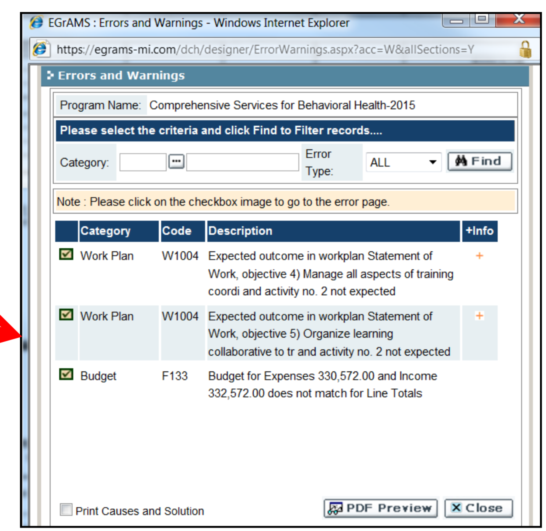
Attachment (open attached file).

Validate Application for Errors

- Select the ‘Facesheet’ tab of the grant application.
- Click the ‘Done’ button. The system will check the entire application.
- If the application has errors, click the ‘Errors’ button to view the errors.
- After making the corrections, save and re-validate the application.
- Repeat these steps until the application is error free.
- When the application shows no errors it’s ready for review and submission by the Authorized Official.





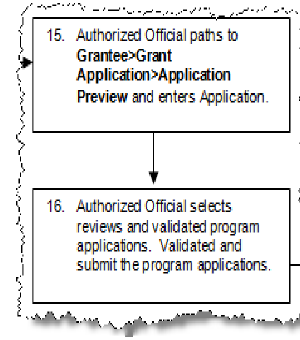


Application Submission

- Authorized Official's Application Submission
- Print Application
- Viewing the Draft Agreement
  - Viewing the DRAFT Agreement

Agreement Acceptance

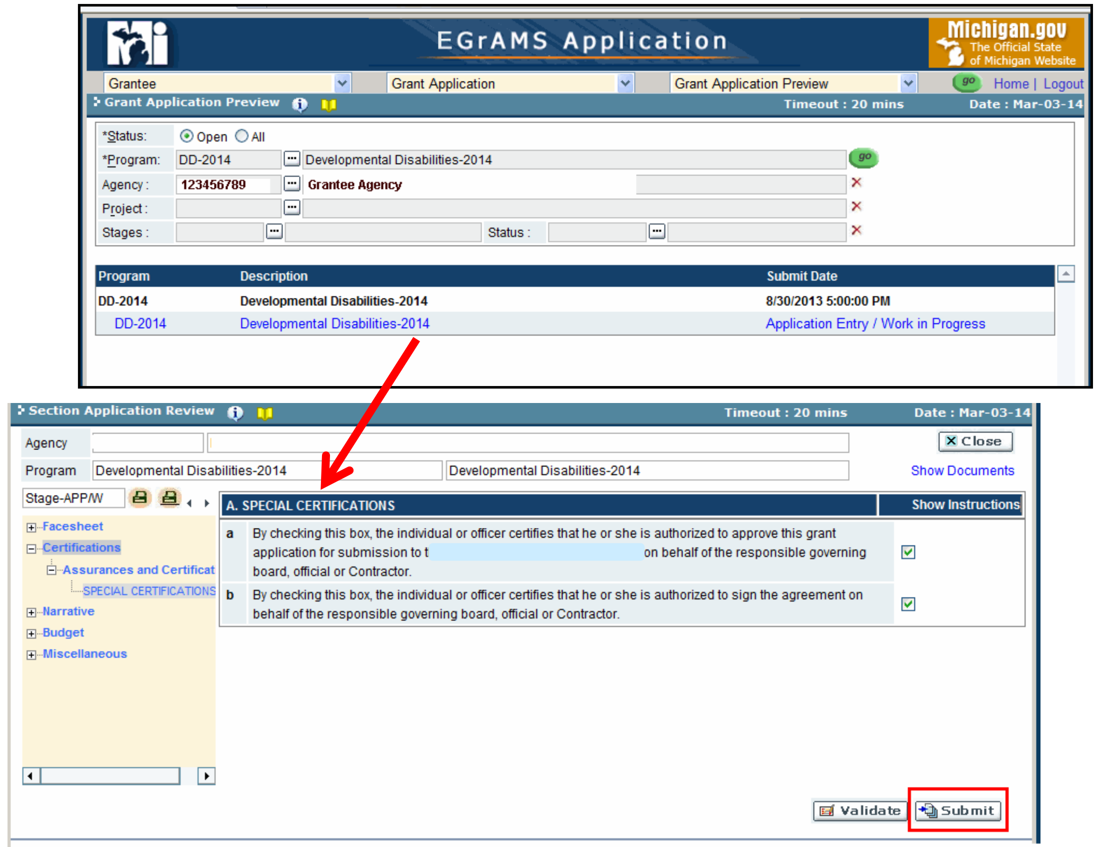
- Agreement Approval
- Authorized Official's Electronic Signature
- View/Print Agreement



Submit the Program Application

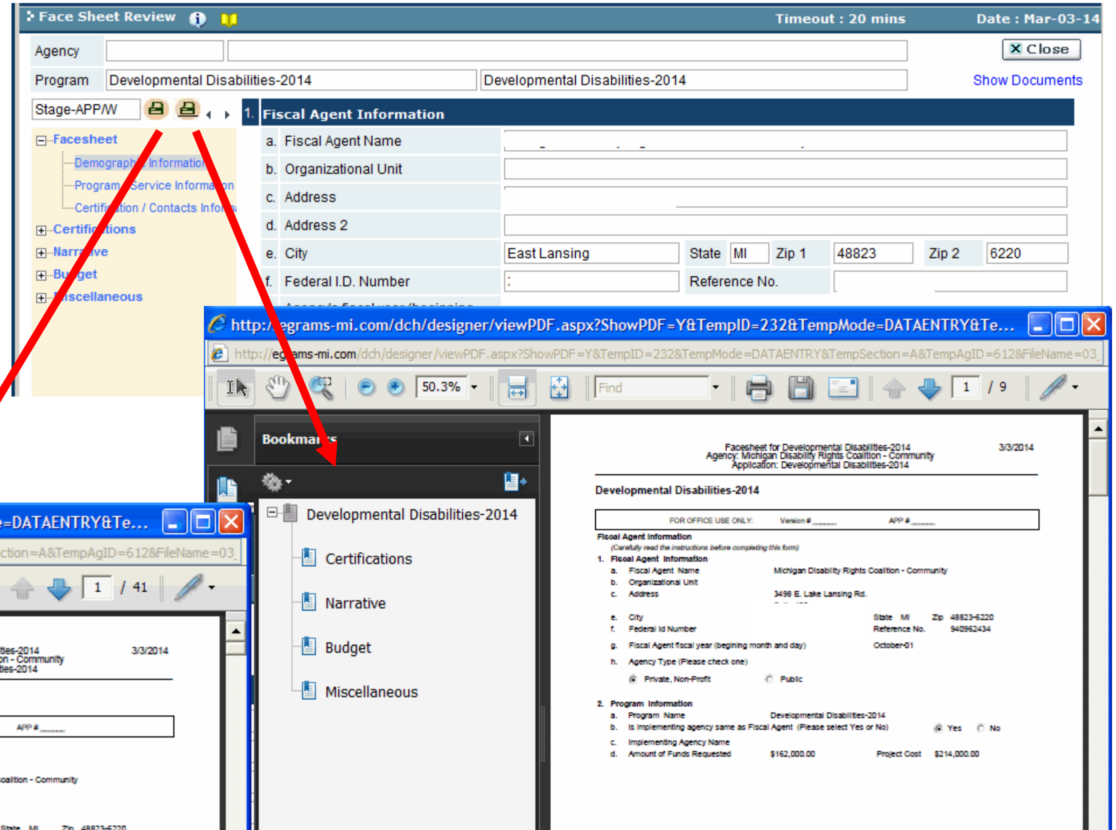
- The Authorized Official will navigate to: **Grantee -> Grant Application -> Grant Application Preview**, from the drop-down menu. Click the ‘Go’ button.
- The system displays the ‘Grant Application Preview’ screen.
- Only the **Authorized Official** can submit the applications. To submit the application, the Authorized Official completes the following steps:

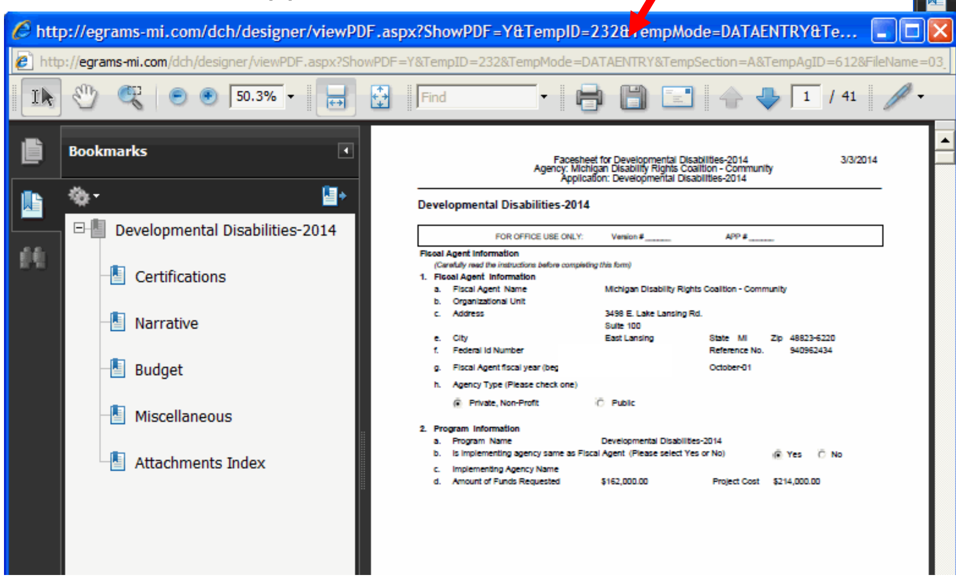
- *Program: Select a grant program, using the 'Lookup' icon. Click the ’Go’ button.
- Agency: System pre-populates.
- Click the grant program hyperlink to view a read only version of the application.
- Click the ‘Submit’ button. To promote the application to MDHHS Program for review.
- The system will prompt the user to confirm submission.



Printing Program Application Materials

- To print and/or review the program application.
  - Click on the ‘Printer’ icon to the left. To view a PDF version of the application including PDF Attachments.
  - Click on the ‘Printer’ icon to the right. To view a PDF version of the application, without merging in PDF attachments.
  - Click ‘Save’ icon on the PDF Toolbar to save to your computer or the ‘Printer’ icon to print a copy of the application.

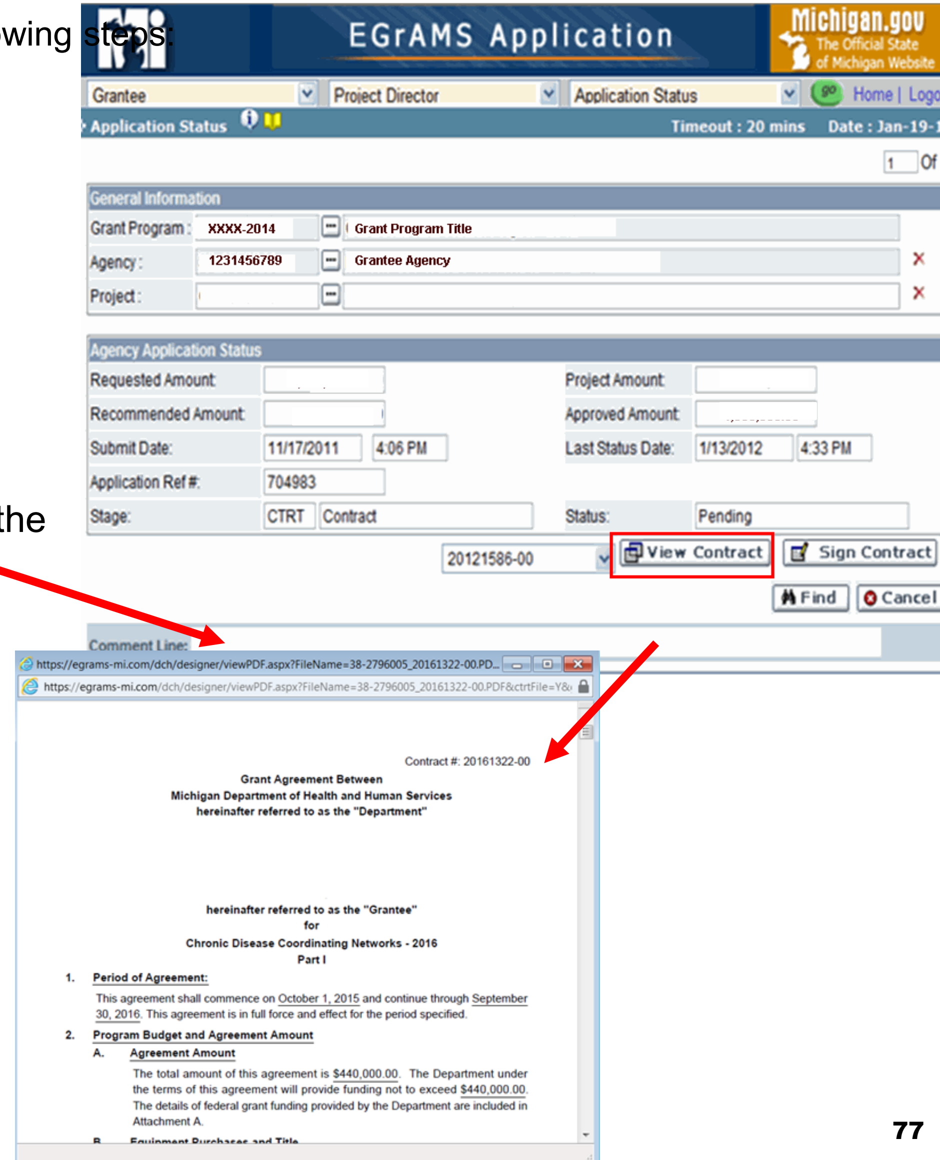




View the Draft Agreement

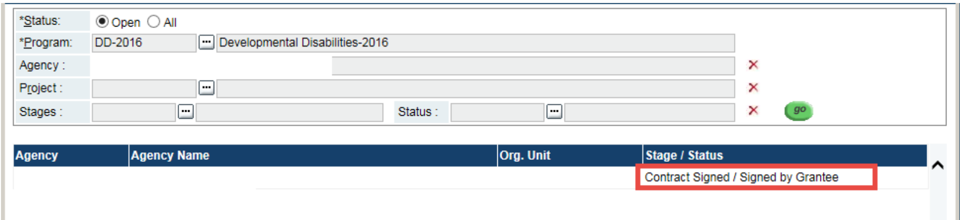
- Go to: **Grantee -> Project Director -> Application Status**, from the drop-down menu. Click the ‘Go’ button.
- The system displays the ‘Application Status’ screen.
- To view the draft agreement complete the following steps:

- Grant Program: Select the grant program using the 'Lookup' icon.
- Click the ‘Find’ button.
- To view draft agreement, Grantee click the ‘View Contract’ button.
- A pop-up window containing the draft agreement will open.
- Save, email or print draft agreement using the PDF toolbar save, email or print icons.



To 'Track' a Grant through the MDHHS Review & Approval Process:

- Once an Application has been **submitted** by the Authorized Official, the Grantee can track the progress by monitoring the Stage **and** Status of the Application.



1. Grants section releases Agreement. Grantee must work on grant application sections with goal to submit prior to beginning of agreement period.

Location	Stage	Status
Grantee	Application Entry	Pending / Work in Progress
Grantee	Proposal Revision	Pending / Work in Progress

2. Grantee submits Agreement. Grantor must now move agreement through this series of approvals:

Location	Stage	Status
Grantor	Program Approval	Ctrt Manager Tasks
Grantor	Program Approval	Pgm Manager Review
Grantor	Budget Approval	Level 1
Grantor	Budget Approval	Level 2
Grantor	Contracts Approval	CTS Tasks
Grantor	Contracts Approval	Admin Svcs Review
Grantor	Contracts Approval	Contract Template
Grantor	Contracts Approval	Ctrt Mgmt Review
Grantor	Master Agreement Contract	Pending

MDHHS

3. Agreement is sent back to Grantee for signature.

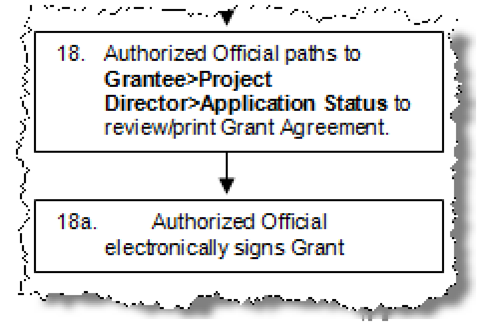
Location	Stage	Status
Grantee	Contract	Pending

4. Grantee signs Agreement. Agreement becomes effective on start date.

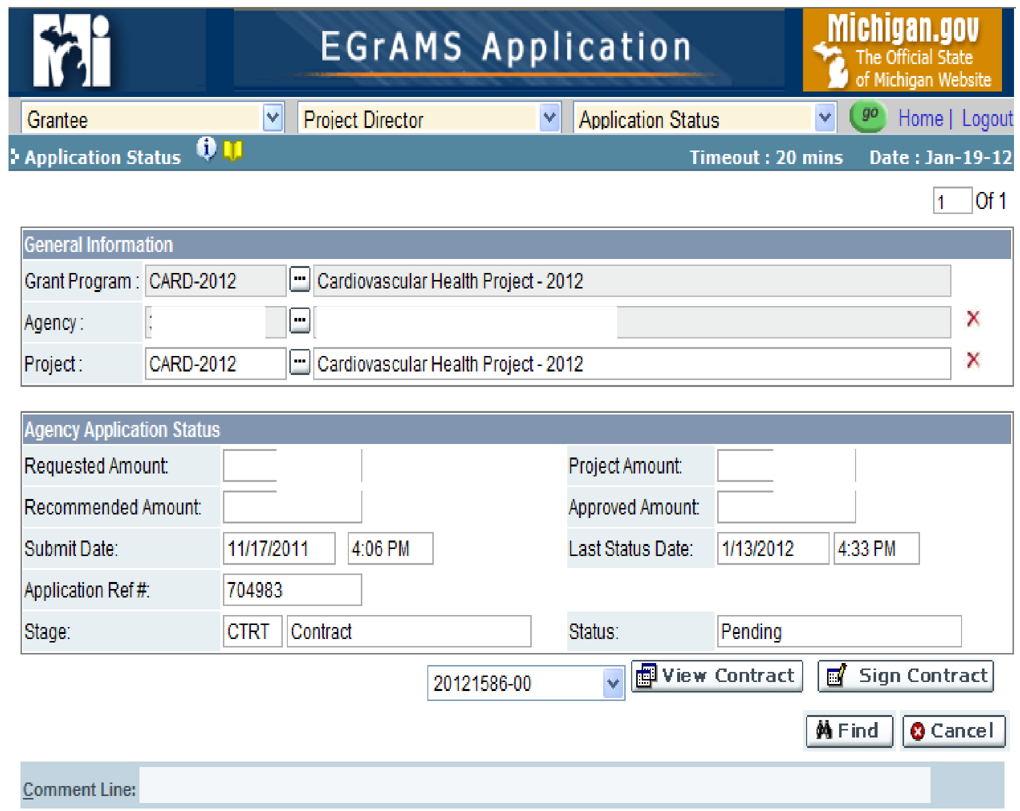
Location	Stage	Status
Grantee	Contract Signed	Signed by Grantee

Electronically Signing the Agreement

- The Authorized Official will receive an email notification, informing them of the agreement to be viewed and signed electronically.
- To Accept/Sign Agreement, select
  - **Grantee -> Project Director -> Application Status**, from the drop-down menu. Click the 'Go' button.
  - The system will display the 'Application Status' screen.



- **Grant Program**: Select a grant program, using the 'Lookup' icon.
- **Agency**: System pre-populates.
- Click the 'Find' button. The system displays the grant program status selected.
- Click the 'View Contract' button to view a PDF version of the Standard Agreement.
- Click the 'Contract Signed' button to accept and execute the agreement.

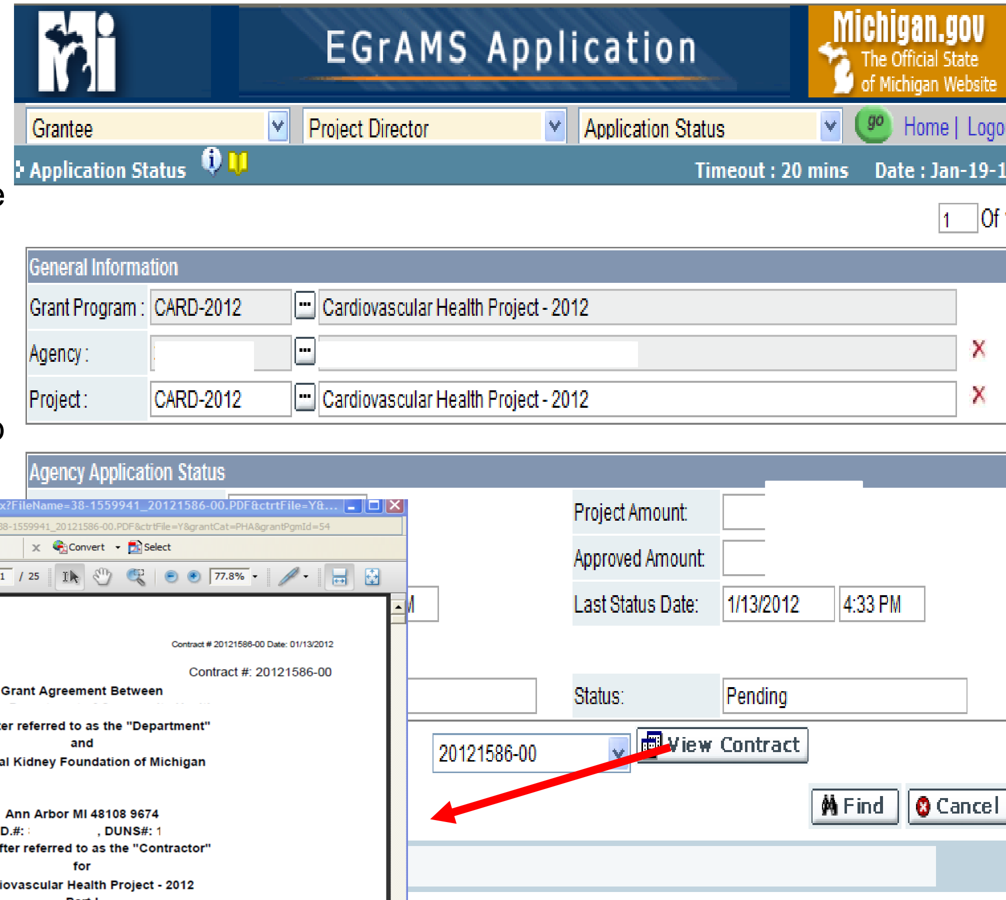


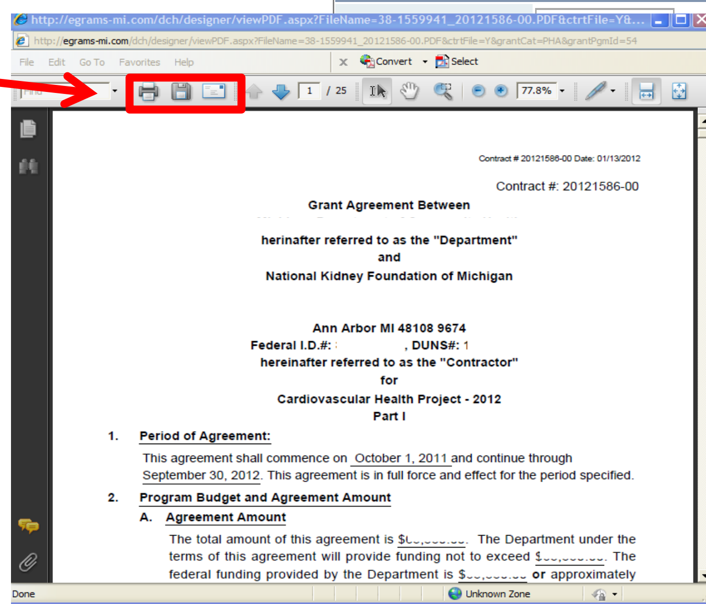
NOTE: Only the Authorized Official can electronically sign the Agreement.

View /Print the Signed Agreement, select

- Navigate to **Grantee -> Project Director -> Application St**atus, from the drop-down menu. Click the 'Go' button.
- The system will display the 'Application Status' screen.

- Grant Program: Select a grant program, using the 'Lookup' icon.
- Agency: System pre-populates.
- Click the 'Find' button. The system display the grant program status selected.
- Select the agreement to view from the dropdown.
- Click the 'View Contract' button to view a PDF version of the Agreement will open in a pop-up window.
- Save, email or print agreement using the PDF toolbar save, email or print icons.





Grant Application

- Allocation Notification
  - Email Notification
- Understanding Application Tools
  - Application Sections (Tabs)
  - Action Buttons
  - Validate Application for Errors
- Application Entry

Application Submission

- Submit Application
- View/Print Application

Application Status

- Agreement Approval & Signature
- View/Print Agreement

Questions?

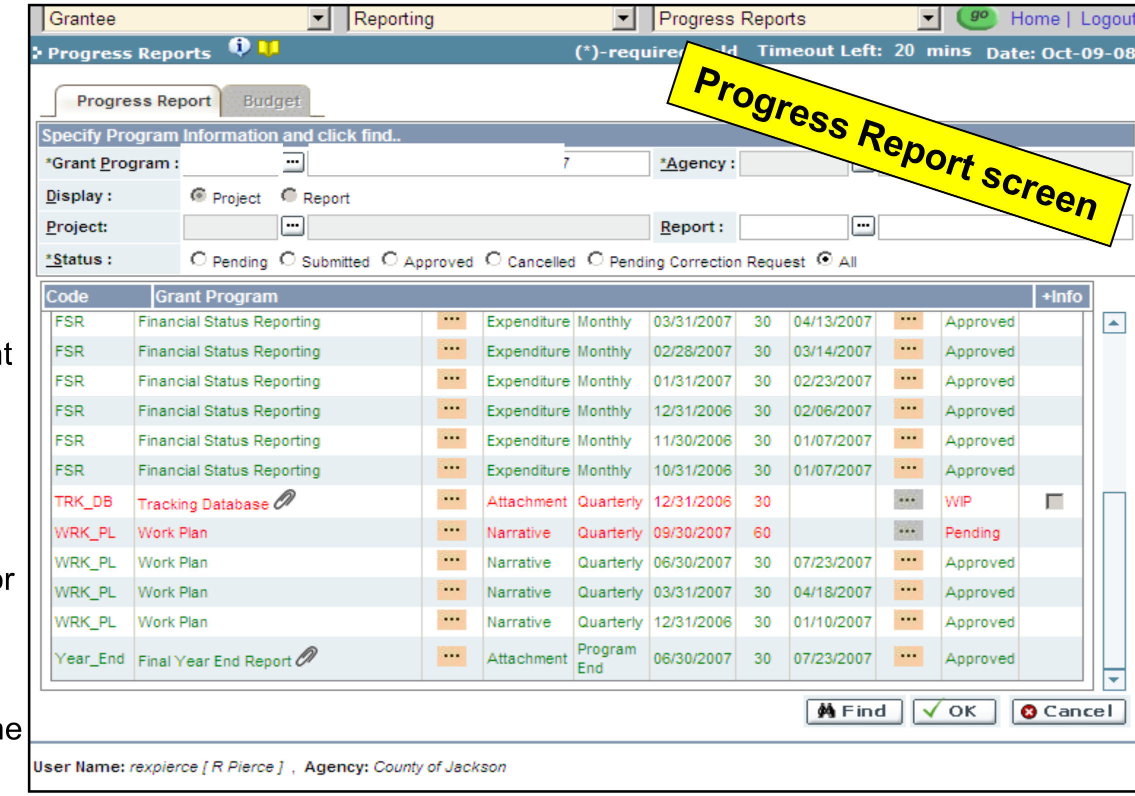
Progress Reports

- Understanding the Progress Reports
  - Inside Progress Reports
    - Action Buttons
    - Validate Progress Report
    - Print Progress Reports
  - Reporting, Attachments, & Submission
- Type of Progress Reports
  - Financial Status Report (FSR)
  - Work Plan
  - Statistical Reports

List of Progress Reports for a Reporting Period

Navigate to: **Grantee -> Reporting -> Progress Reports** and click the 'Go' button.

- Select Grant Program using the 'Lookup' icon.
- Click 'Find' button to retrieve Reports due for submission.
- Click any part of the line to open the report.
- Screen displays:
  - All reports applicable for the Grant Program selected.
  - Due dates and grace days for the respective reports.
  - Status of the Reports.
  - Report Notes by Report, if any.
  - Review Notes by Report if Grantor requested corrections.
- Once the Report is completed, saved, and validated, it can be submitted by checking the box located under the Submit column.
  NOTE: Submit checkbox is enabled when the Report is properly validated <u>and</u> the User with the correct Permission Code is making the selection.
- ***Contact the MDHHS Program Staff immediately if a report is submitted in error.***



Report color notations (no email reminders are sent)

- **Green**: Not due yet <u>**or**</u> Submitted
- **Gold**: Due (To be submitted by Report Date + Grace Days)
- **Red**: Past Due (Late)

Inside the Progress Report

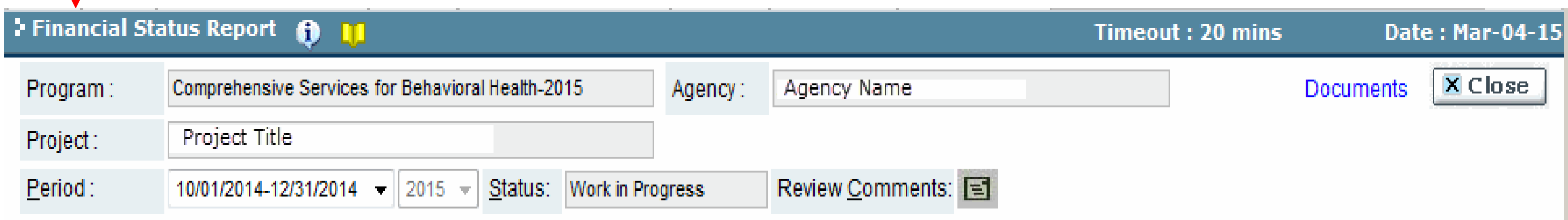
Progress Report Name

Screen information – Provides high level information on the screen

Screen Help – Provides detail instructions and help about the screen

Timeout Warning – Pay attention to the timeout display. Save your work if it gets to 4 minutes

Current Date



- This header is displayed on all pages of the progress report

Program: Displays the name of the Grant Program.

Agency: Displays the name of the your Agency.

Documents: A link to additional program documentation, i.e.: Statistical Report Instructions.

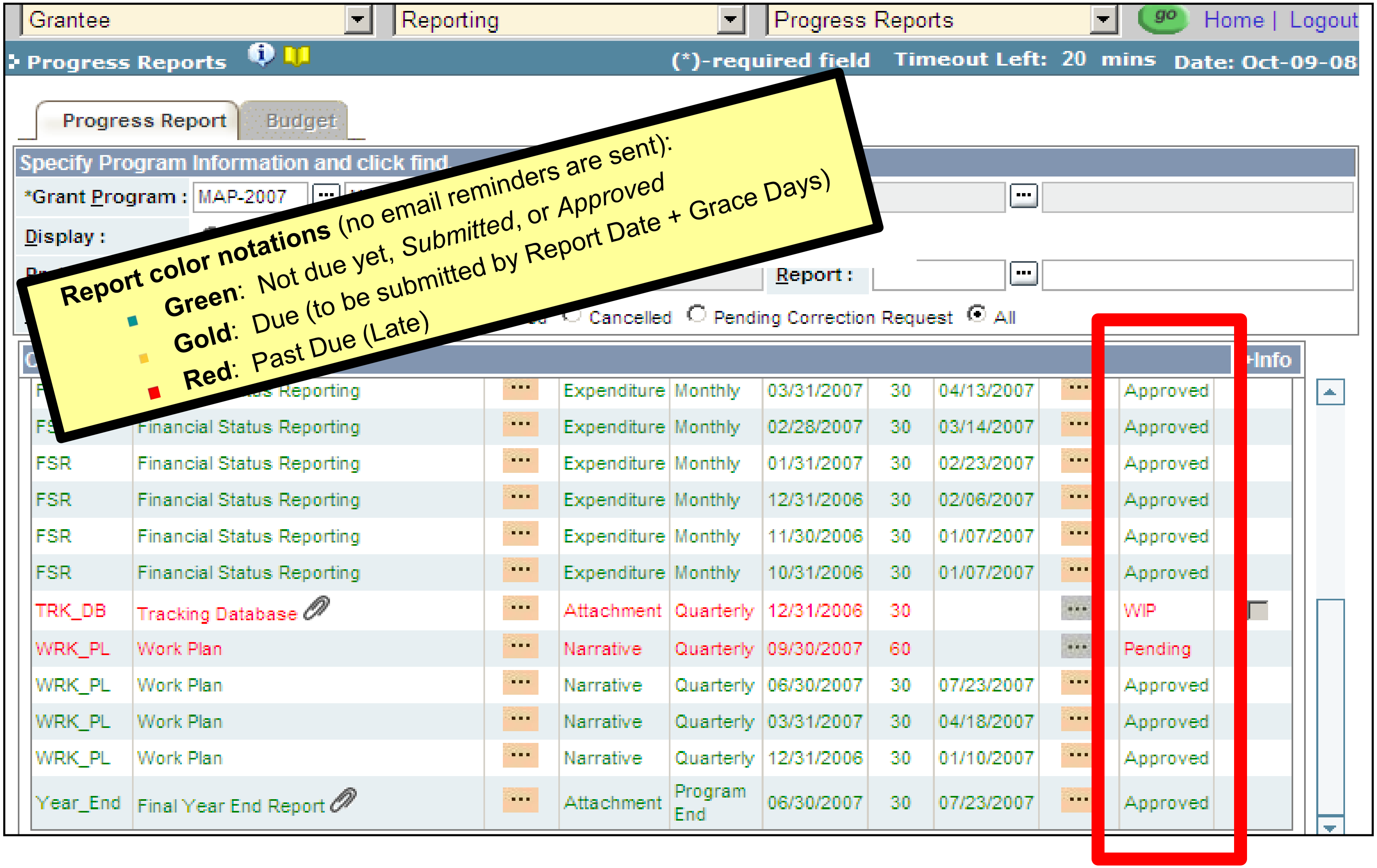
Close Button: Click to close out of the report, the system will display a warning if you have not saved changes.

Project: Displays the name of the your Project.

Period: The current reporting period appears in the drop down menu. To view a previous reporting period select the period dropdown menu.

Status: Shows the current status of the report: Pending, WIP (Work In Progress), Submitted, Corrections, or Approved.

Review Comments: If the report is sent back for corrections, to view the grantor's comments, click on the reviewer comments icon.



Status Column – Shows the current status of the report:

- **Pending** – Report is available to Grantee
- **WIP** (Work In Progress) – Grantee has started the Report
- **Submitted** – Grantee has submitted, ready for MDHHS review
- **Corrections** – MDHHS has rejected for Grantee to correct
- **Approved** – MDHHS has reviewed and approved

Action Buttons

- As the name suggests, the Action button performs the desired task.

Click on **'PDF'** button to view a PDF of the report.

- Saves changes on a page. Click on **'Save'** button. The system saves the information to the report.
- If you try to close out of the report without saving your changes, the system will display a warning.

Click on **'Cancel'** button to discard any changes.

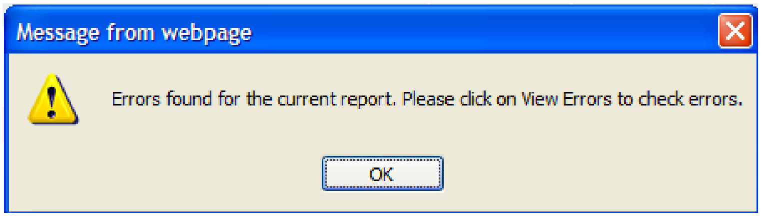
The **'View Errors'** button is enabled if errors are found after validation.

Click on **'Validate'** button to validate the respective section for errors and business rules in your progress report.

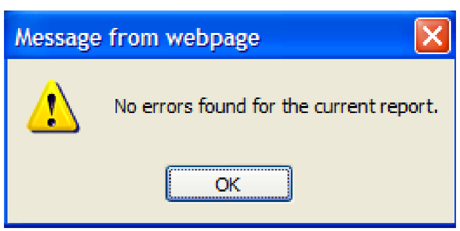
Keep an eye on 'Timeout Left' when doing data entry

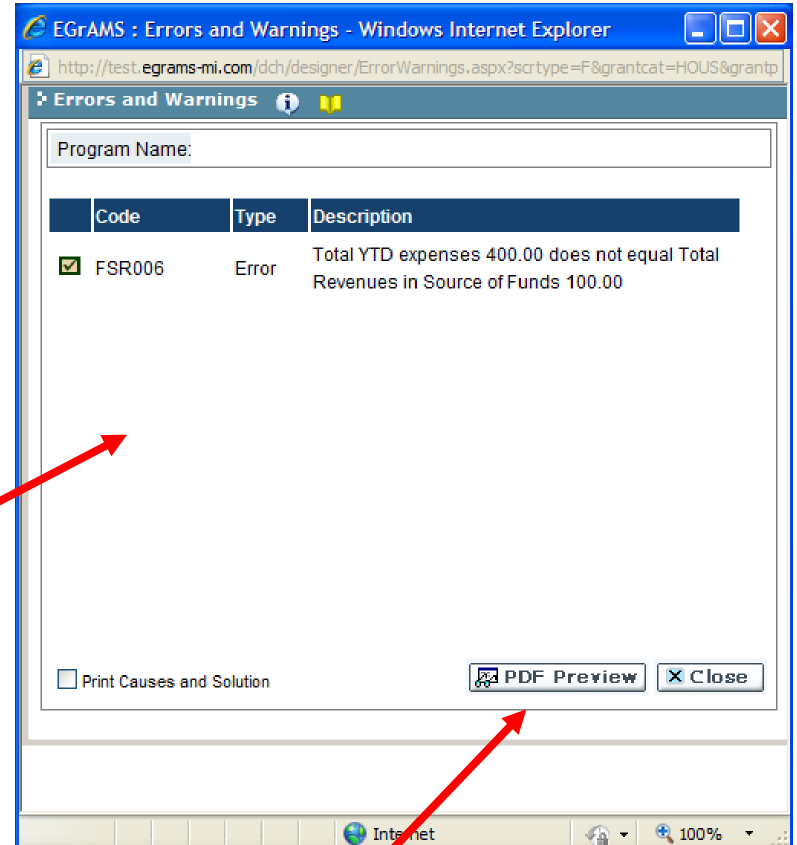
Validate Progress Reports for Errors

- Click on ‘Validate’ button.
- If errors found, the system displays an informational message:



- Acknowledge message.
- The ‘View Errors’ button is enabled.
- Click on ‘View Errors’ action button.
- The system displays the error details in a pop-up window.
- Correct the errors in the Progress Report based on the ‘Validation’ errors report.
- Revalidate the report after correcting the errors. When no errors are found, the system will display this message:

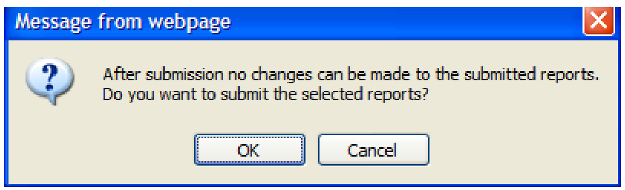




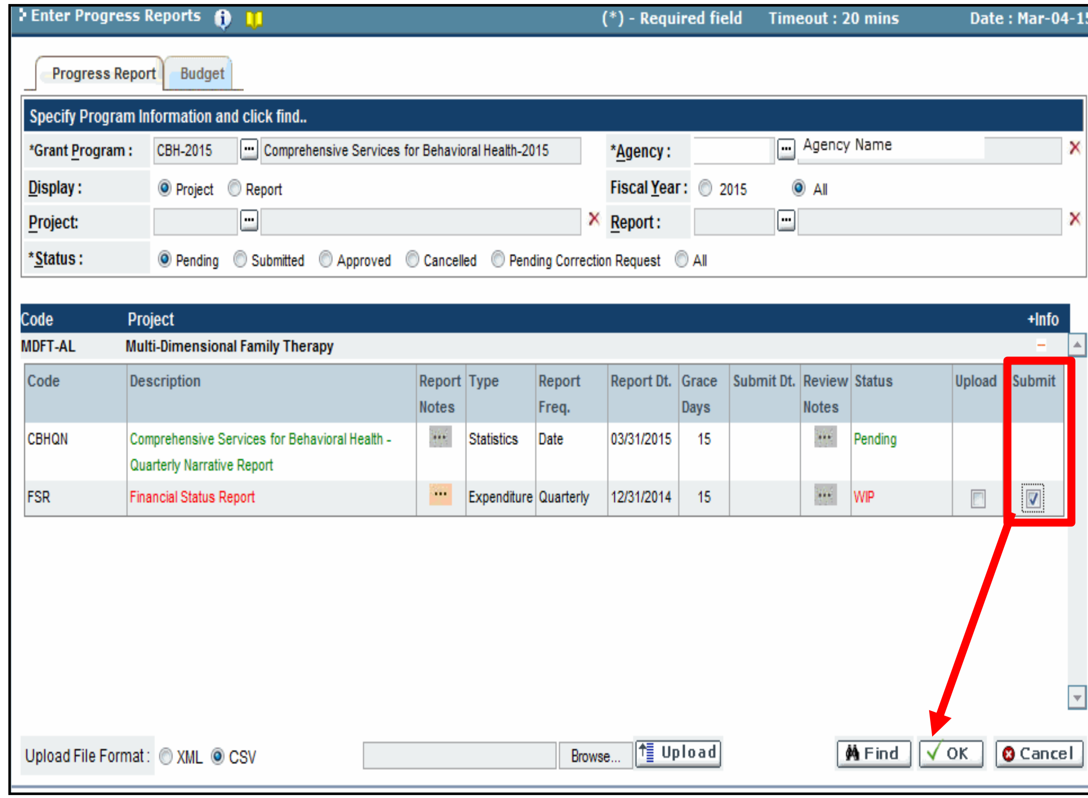
Click to open a .PDF Preview Button for a Document of the errors report.

Submitting a Progress Report

- To submit the Report, click the ‘Submit’ checkbox and click the ‘OK’ button. The system will display this message:



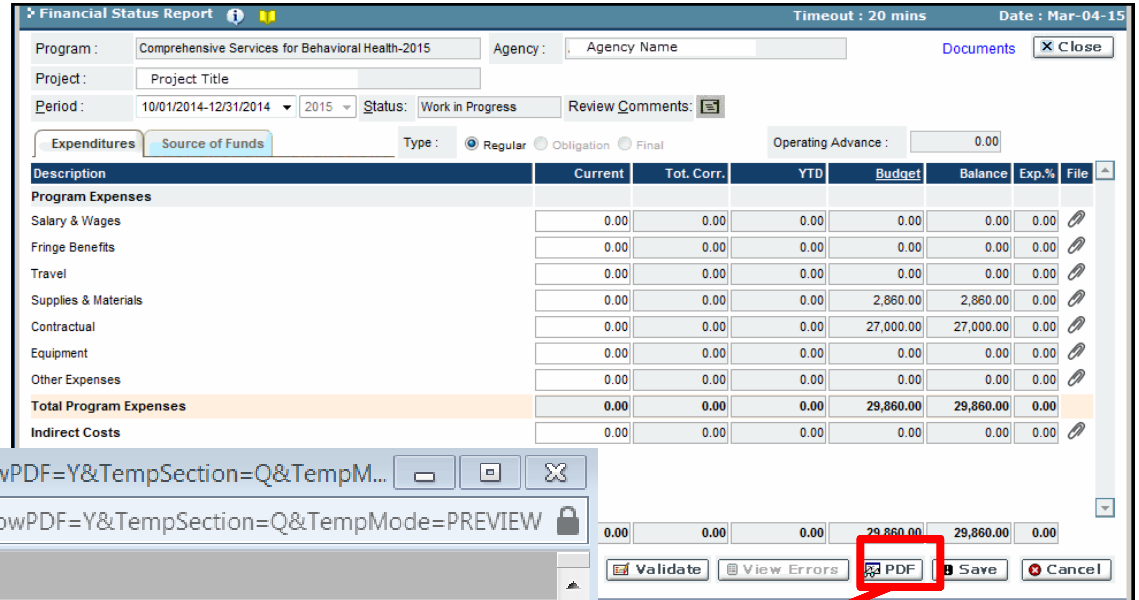
- Acknowledge the message by clicking ‘OK’ button. This action submits the report.
- Upon successfully submission, the status is updated in Status column (from WIP to Submitted).
- The Report is then reviewed and approved, or rejected for Corrections, by MDHHS Staff.

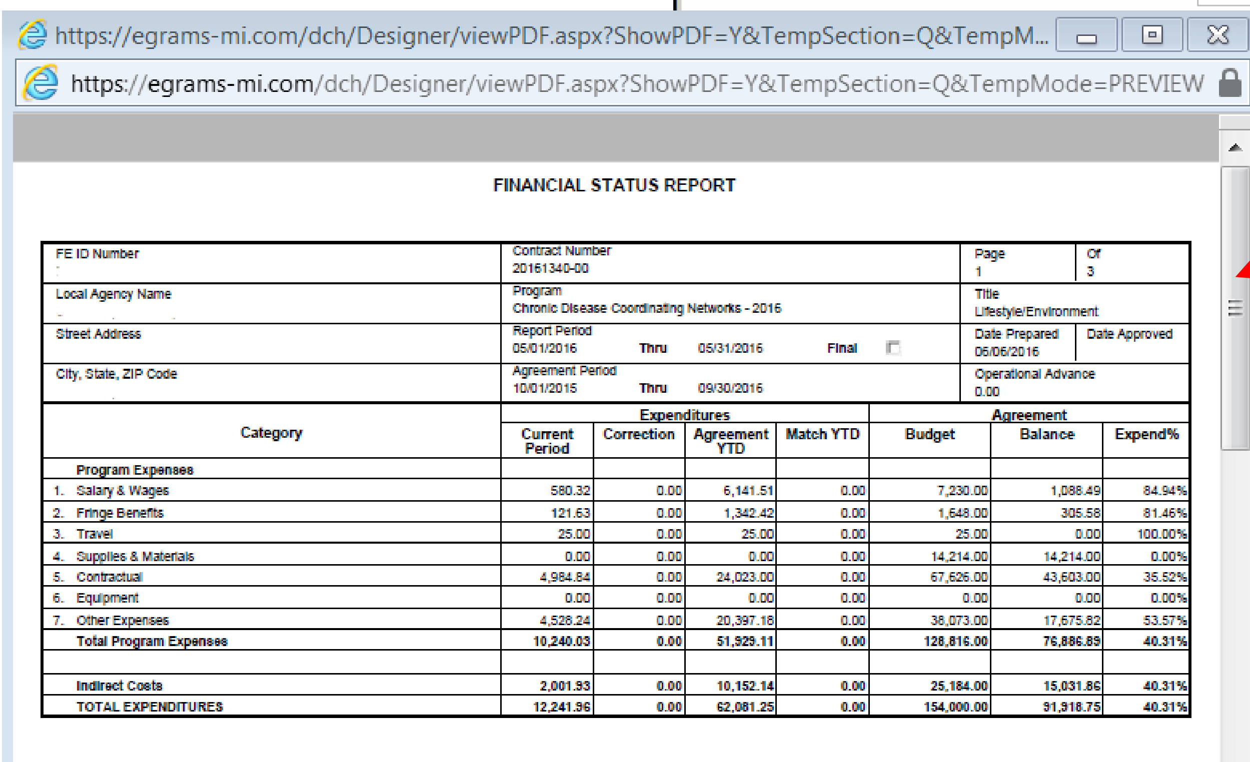


NOTE: The Financial Officer is the **<u>only</u>** Permission Code that will have the Submit checkbox available to submit an FSR.

Print a Progress Report

- At any time you can print copies of pending / submitted / approved / corrections status of <u>any</u> Progress Reports (i.e. Financial, Statistical, WorkPlan, etc.
- Open a Report from the list, and click the Click the 'PDF' button. This will open the Report in a PDF Viewer window.





FINANCIAL STATUS REPORT

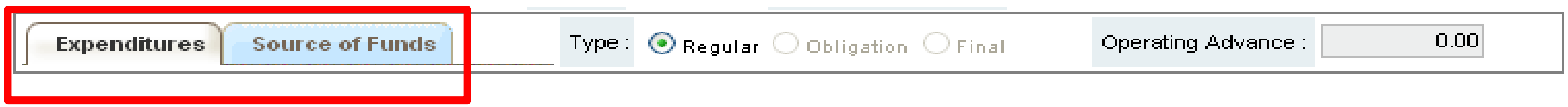
FE ID Number	Contract Number 20161340-00	Page 1	Of 3
Local Agency Name	Program Chronic Disease Coordinating Networks - 2016	Title Lifestyle/Environment	
Street Address	Report Period 05/01/2016 Thru 05/31/2016 Final	Date Prepared 06/06/2016	Date Approved
City, State, ZIP Code	Agreement Period 10/01/2015 Thru 09/30/2016	Operational Advance 0.00	

Category	Expenditures				Agreement		
	Current Period	Correction	Agreement YTD	Match YTD	Budget	Balance	Expend%
Program Expenses							
1. Salary & Wages	580.32	0.00	6,141.51	0.00	7,230.00	1,088.49	84.94%
2. Fringe Benefits	121.63	0.00	1,342.42	0.00	1,648.00	305.58	81.46%
3. Travel	25.00	0.00	25.00	0.00	25.00	0.00	100.00%
4. Supplies & Materials	0.00	0.00	0.00	0.00	14,214.00	14,214.00	0.00%
5. Contractual	4,984.84	0.00	24,023.00	0.00	67,626.00	43,603.00	35.52%
6. Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00%
7. Other Expenses	4,528.24	0.00	20,397.18	0.00	38,073.00	17,675.82	53.57%
Total Program Expenses	10,240.03	0.00	51,929.11	0.00	128,816.00	76,886.89	40.31%
Indirect Costs	2,001.93	0.00	10,152.14	0.00	25,184.00	15,031.86	40.31%
TOTAL EXPENDITURES	12,241.96	0.00	62,081.25	0.00	154,000.00	91,918.75	40.31%

Financial Status Report (FSR) Overview

- The Financial Status Report (FSR) provides a standardized format for reporting expenditures and the source of funds related to the Grant Program.
- ***NOTE:*** Only **one** FSR is submitted for <u>each</u> reporting period, except for September. In the final reporting period - several "September reports" are allowed and will need to be approved. Also, be sure that a final FSR is submitted and approved (even if its a zero FSR).

FSR Worksheet Tabs: The FSR contains two tabs: Expenditures and Source of Funds. <u>Each</u> tab contains a worksheet that the Grantee must complete to submit an FSR.



- **Expenditures Tab** – Allows the grantee to report on current period expenses as identified in their original or amended agreement.
- **Source of Funds Tab** – Assures that all source of funds are included and that the match requirement is met, as was identified in the agreement.
- Report Types:
  - **Regular** – A monthly financial expenditure report.
  - **Obligation** – A one-time report submitted in late August/early September in which the Grantee estimates the amount of remaining expenditures that will be billed in the grant year. This report is used to develop the MDHHS's year-end accounts payables and receivables for this Agreement.
  - **Final** – The last financial report of expenditures for a Grant Agreement.

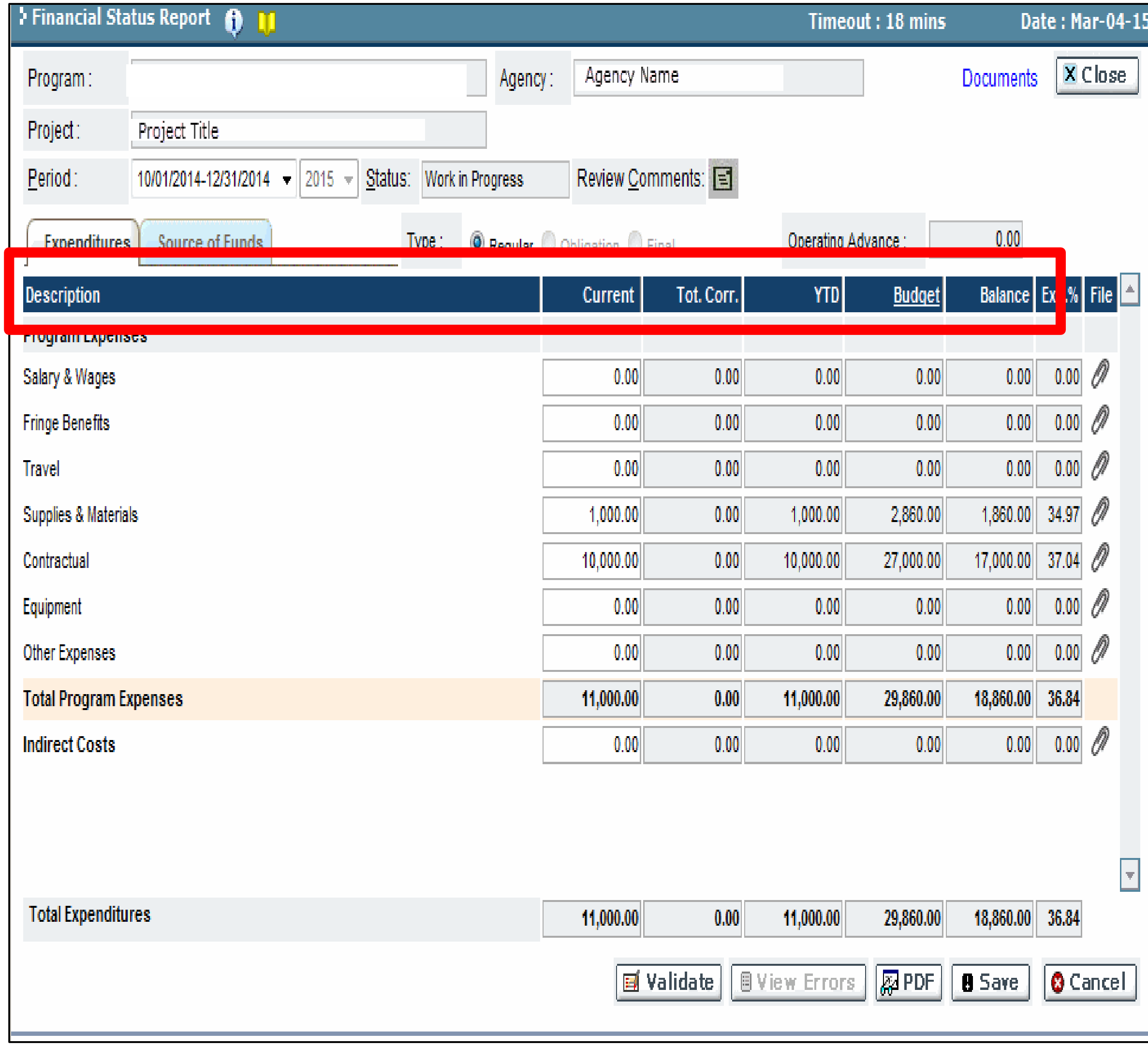
Expenditures Tab

- The Grantee enters the allowable costs incurred for carrying out program specific activities on the 'Expenditure' tab.

Expenditures Columns:

- **Description Column** – Lists the major budget categories, as found on the program budget summary schedule of the Agreement.
- **Current Column** – Enter the expenditures by budget category as reported for the current period.

  NOTE: The system will not allow you to enter expenditures in categories that are not part of the Original Agreement. Items not part of the Original or Amended Agreement are grayed out (i.e. disabled).
- **Total Corr. Column** – Reflects all corrections by budget category for the Agreement to date.
- **YTD Column** – Reflects all of the Year-To-Date expenditures by budget category for the Agreement.
- **Budget** – Reflects the current budget of the <u>last signed</u> Agreement.
- **Balance** – The system automatically calculates the remaining balance of the Agreement by budget category.


Financial Status Report   Timeout : 18 mins   Date : Mar-04-15

Program: Agency: Agency Name   Documents   X Close

Project: Project Title

Period: 10/01/2014-12/31/2014 2015 Status: Work in Progress Review Comments:

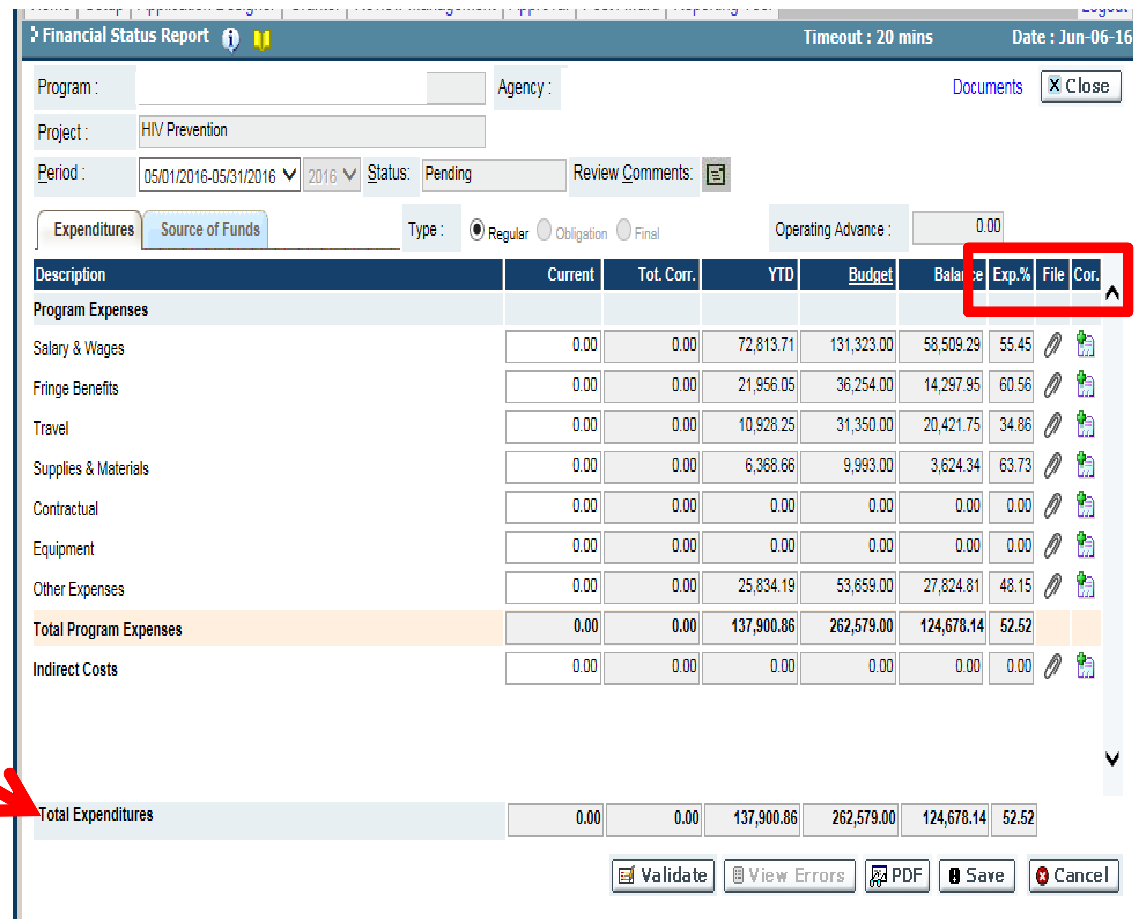
Expenditures | Source of Funds   Type: Regular Obligation Final   Operating Advance: 0.00

Description	Current	Tot. Corr.	YTD	Budget	Balance	Ex %	File
Program Expenses							
Salary & Wages	0.00	0.00	0.00	0.00	0.00	0.00	
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	
Travel	0.00	0.00	0.00	0.00	0.00	0.00	
Supplies & Materials	1,000.00	0.00	1,000.00	2,860.00	1,860.00	34.97	
Contractual	10,000.00	0.00	10,000.00	27,000.00	17,000.00	37.04	
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	
Other Expenses	0.00	0.00	0.00	0.00	0.00	0.00	
Total Program Expenses	11,000.00	0.00	11,000.00	29,860.00	18,860.00	36.84	
Indirect Costs	0.00	0.00	0.00	0.00	0.00	0.00	
Total Expenditures	11,000.00	0.00	11,000.00	29,860.00	18,860.00	36.84	

Validate   View Errors   PDF   Save   Cancel

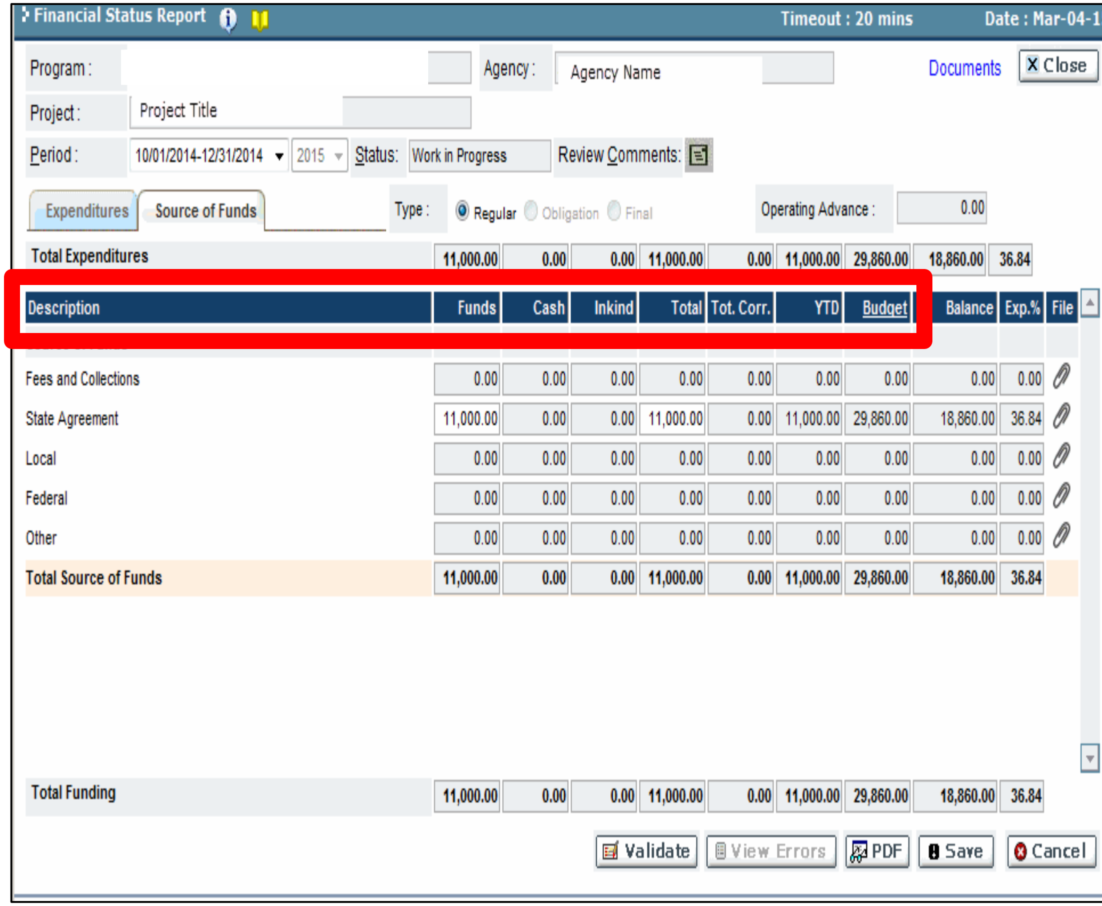
Expenditures Tab cont'd

- **Expend%** – Refers to the percentage used within each budget category.
- **File** – Click the 'Paper Clip' icon to upload an attached documentation /supplemental FSRs as required by MDHHS. Documents should be Encrypted.
- **Cor.** – The system allows the Grantee to make corrections to a previous period's Financial Status Report statements.
  - If corrections are made, both the screen and the PDF document will show the corrections by adding a corrections column.
- **Total Expenditures** – The system calculates and reports the total expenditures for all columns and provides the Grantee with the expends percentage between the Budget and the remaining balance total for the Agreement expended to date.
- Click the 'Save' button to save changes.
- **Click the 'Validate' button to check for errors (refer to page 87).**



Source of Funds Tab

- The Source of Funds tab assures that all source of funds are included and that the match requirement is met, as identified in the Agreement.

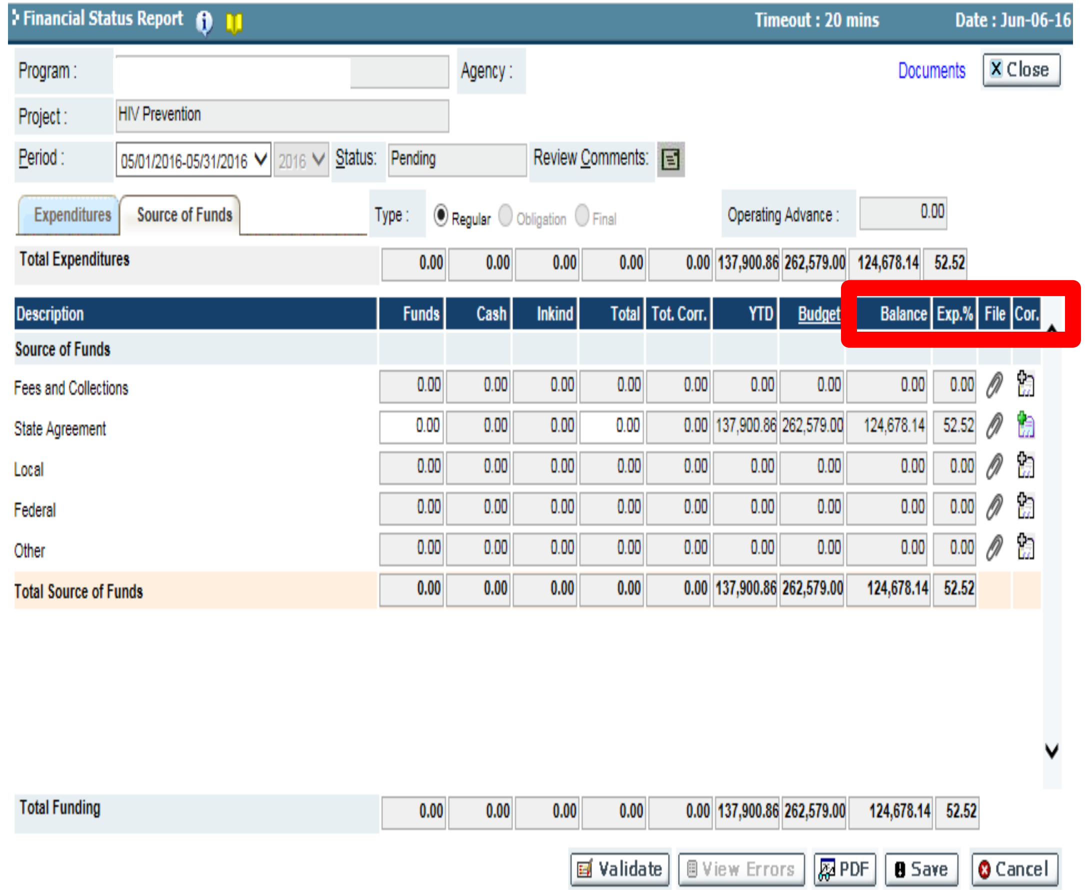


Source of Funds Columns:

- **Description Column** – Lists the major budget categories as found on the program budget summary schedule.
- **Current Column** – Enter the amount of funds spent by the funding source (i.e. State Agreement, Local Funds, etc.).
- **Tot. Corr. Column** – Displays corrections made to the report.
- **YTD** – Refers to Year-to-Date and reflects the support by source of funds category.
- **Budget** – Reflects the current budget of the most recent executed agreement or amendment.

Source of Funds Tab cont'd

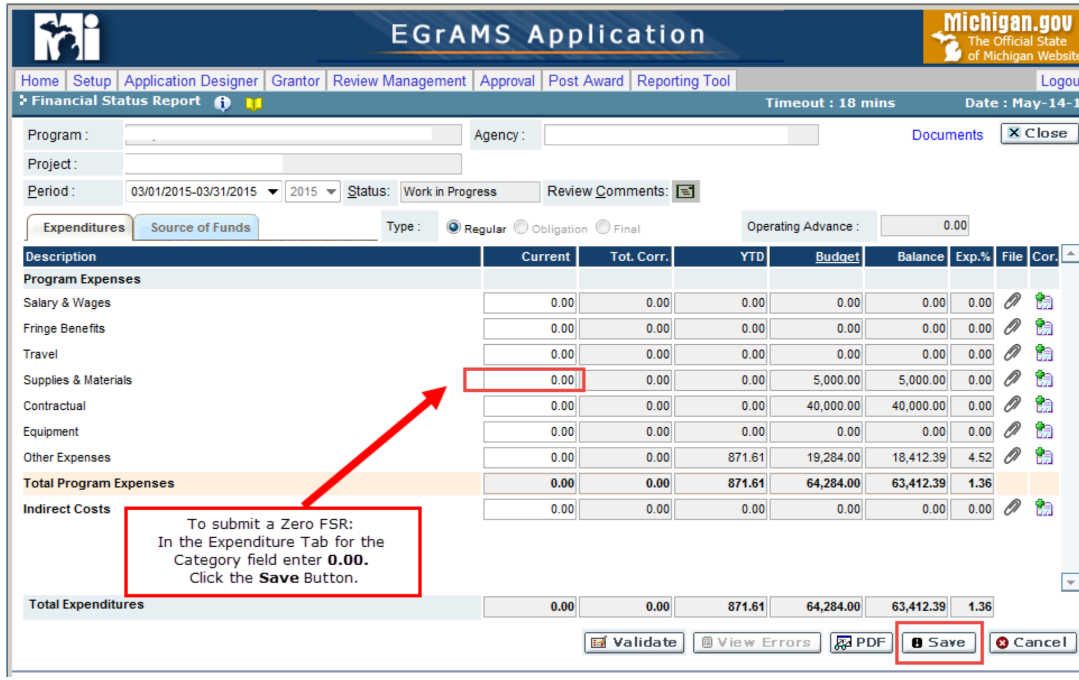
- **Balance** – The system automatically calculates the remaining balance of the agreement by funding source.
- **Expend%** – Refers to the percentage of support used by funding source.
- **File** – Click the 'Paper Clip' icon to upload an attached documentation /supplemental FSRs as required by MDHHS.
- **Cor.** – The system allows the Grantee to make corrections to a previous period FSR statement.
  - If corrections are made, both the screen and the PDF document will show the corrections by adding a corrections column.
- Click the 'Save' button to save change.
- **Click the 'Validate' button to check for errors (refer to page 87).**

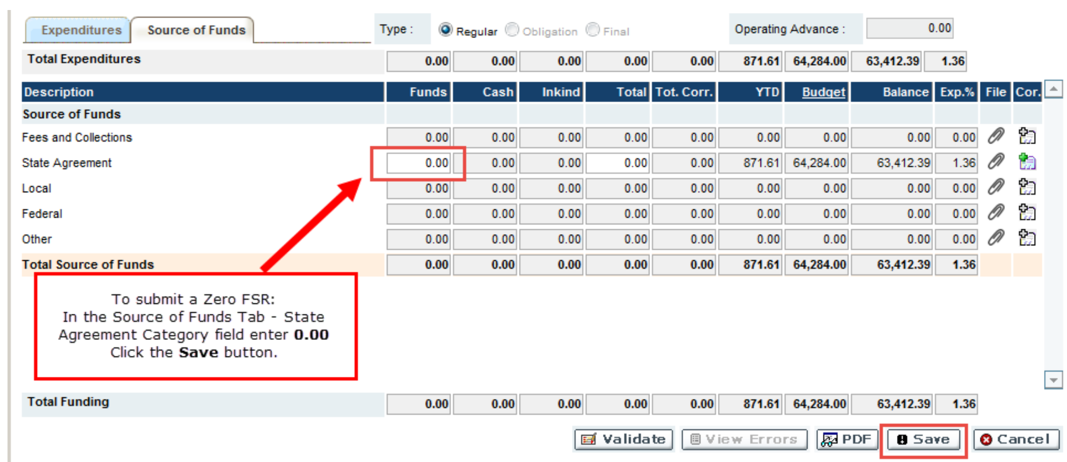


Complete a Zero FSR Report

To complete a Zero Financial Status Report.

- Expenditure Tab: select the Budget Category field to reflect zero expenses for the reporting period.
- In the Current column enter 0.00.
- Click the 'Save' button.
- Source of Funds Tab: select State Agreement field to reflect zero expenses for the reporting period.
- In the Funds column enter 0.00.
- Click the 'Save' button.
- Click the 'Validate' button to check for errors.
- Note: The Zero's shown on the screen are placeholders. Showing the field type (numeric).



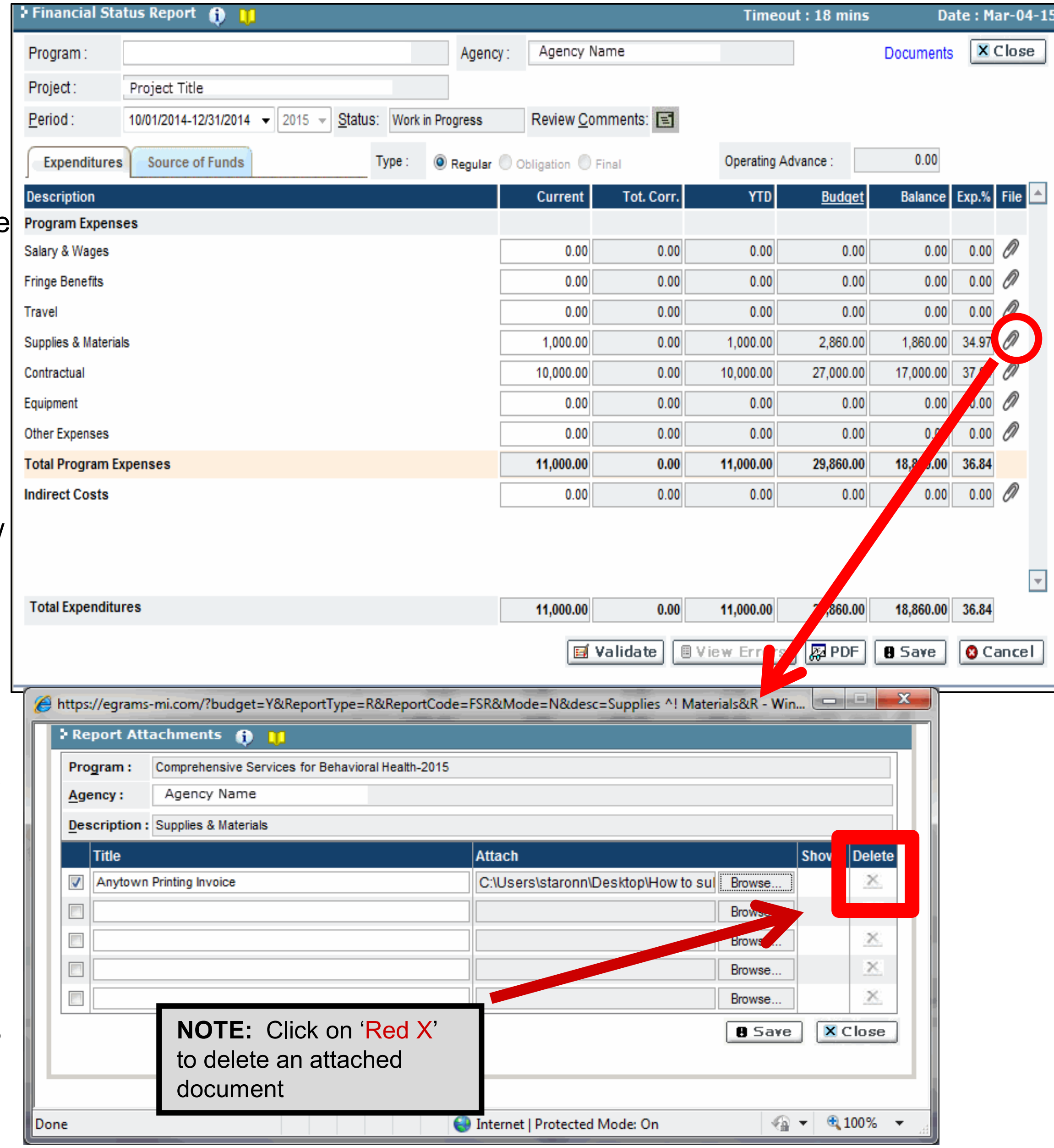


Attachment to FSR Report

- Click the ‘Paper Clip’ icon, for the attachment pop-up window to appear
- Enter a ‘Title’ of the supporting documentation you will be attaching to the Expenditures or Source of Funds tab.
- Choose the file to upload from your computer by clicking on the ‘Browse’ button.

  NOTE: The filename must <u>not</u> be longer than 18 characters **and** cannot contain any blank spaces *or* special characters such as: ^ & ( ) - $ %.
- To attach more then one document follow the same steps, using the next available row under the first attachment. Currently the system allows for up to five attached documents.
- Click the ‘Paper Clip’ icon to view the uploaded attachment to make sure that it opens.

  NOTE: If it does not open for you it likely will not open for MDHHS.
- Click the ‘Save’ button to save changes. The pop-up window will close.
- Only the **Financial Officer** can submit this report from the Progress Report screen (refer to page 88) .
- Once reviewed and approved by MDHHS Staff the payment is then authorized and processed.

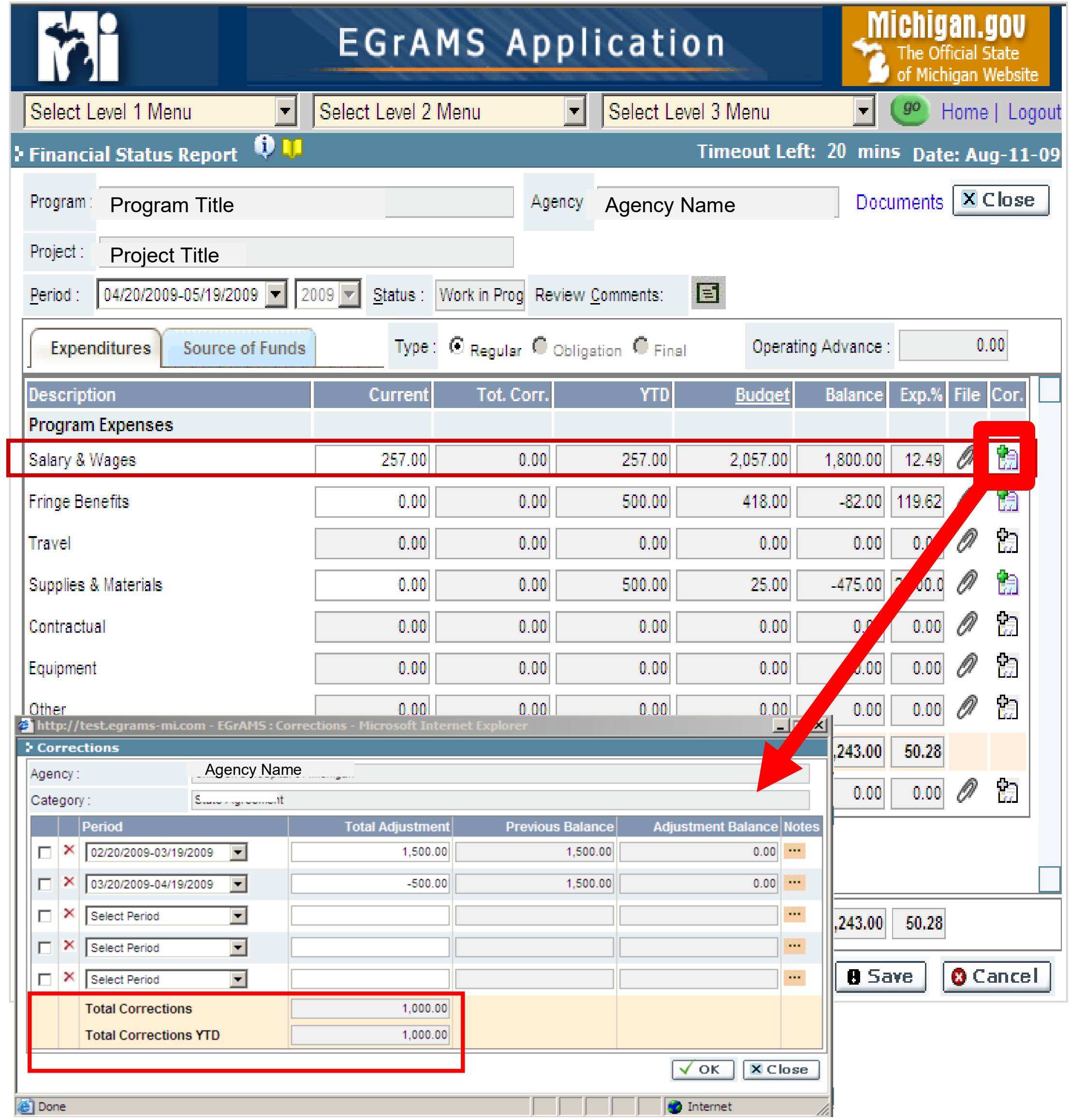


Expenditures Correction to a Prior Period FSR

- Click on the 'Corrections' icon for the expense category to correct on the Expenditures tab. System displays correction screen.

The Correction Screen displays:

- **Period** – Select the reporting period of correction.
- **Total Adjustment** – Enter the amount to be corrected.
- **Previous Balance** – View previous balance adjusted.
- **Adjustment Balance** – View adjusted balance.
- **Total Corrections** – View the total correction amount for that period.
- **Total Corrections YTD** – View the total correction amount Year-To-Date.
- Click the 'OK' button to close pop-up and 'Save' to save changes.
- Click the 'Close' button to discard the selections.

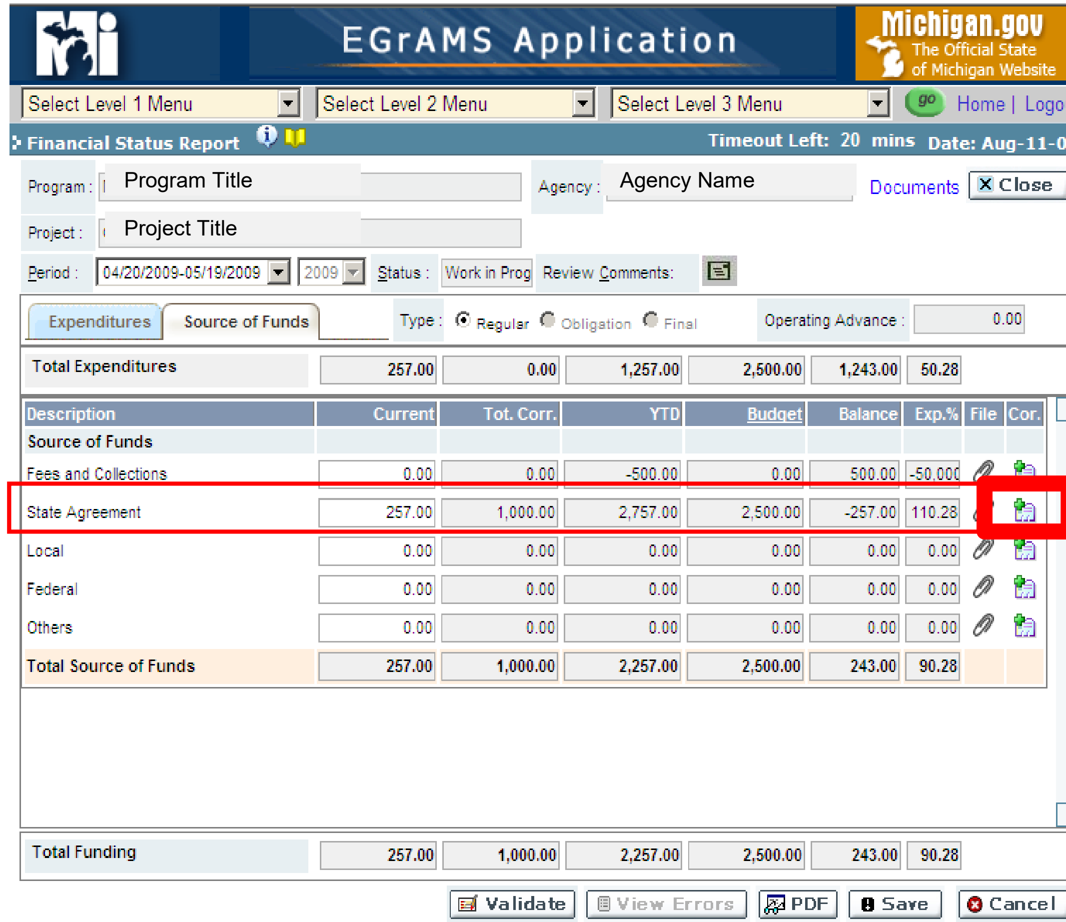


Expenditures Correction to a Prior Period FSR

- After clicking on the ‘Save’ button, the system will re-generate and now reflects the corrected amount in the Total Corrections Column.
- Click on the **Source of Funds** tab ‘Corrections’ icon to correct the funds category. System displays correction screen.

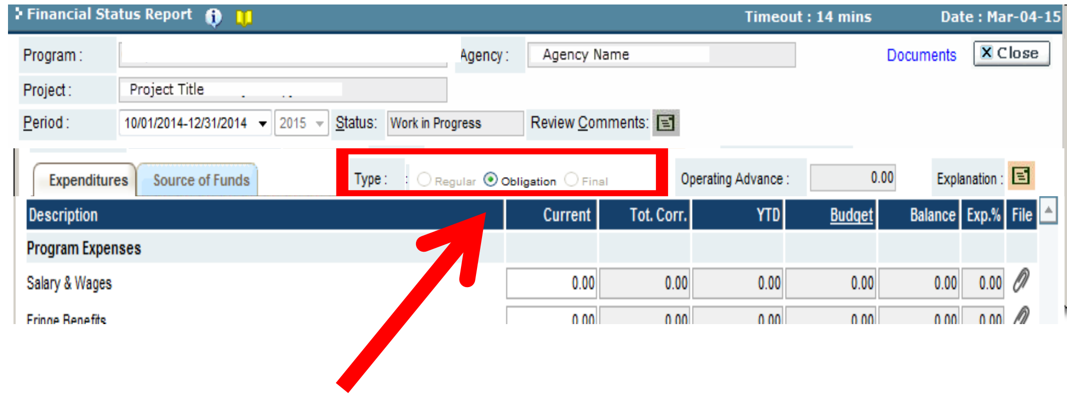
Note: Any corrections made in the Expenditures tab for a reporting period also needs to be corrected on the Source of Funds tab, for the same reporting period.

- Click the ‘OK’ button to save changes.
- **Click the ‘Validate’ button to check for errors (refer to page 87).**
- Upon Validation, you will receive an error message, if you have not made the corrections to the Source of Funds tab.
- Only the **Financial Officer** can submit this report from the Progress Report screen (refer to page 88) .

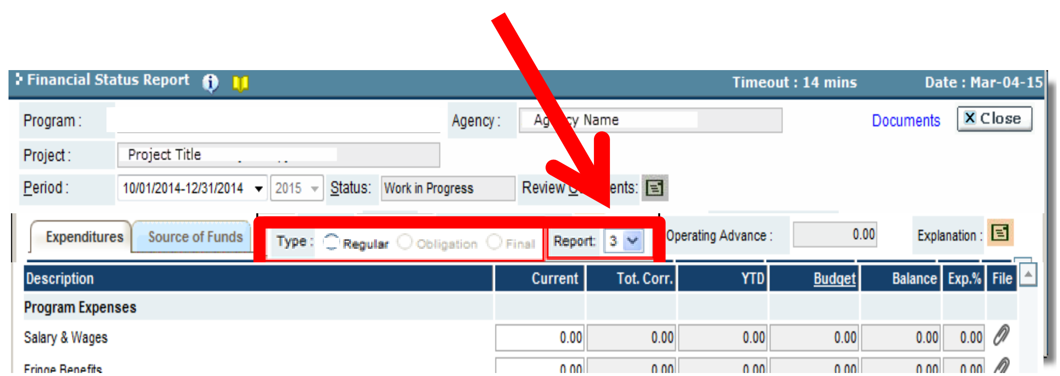


Special Year-End Financial Status Reports

- **Obligation Report** – This report should be an estimate of remaining expenditure for the final agreement period.
- **Last Project Period Report** – This report is a regular report which can be submitted <u>multiple times</u> prior to submitting the “Final” report.
- **Final Report** – This report should be selected when the agency is ready to report the <u>final</u> expenditures.
- Only the **Financial Officer** can submit this report from the Progress Report screen (refer to page 88).



NOTE: The User will enter the data in these reports similar to a regular FSR. The only difference is the “**Type**.”



Work Plan Report

During the application process, Grantees were asked to develop a Work Plan (Statement of Work) that detailed the Agency's Goals and Objectives. Using this information, the system generates a Work Plan Evaluation report. This report allows the Grantee to track and report on the Program's progress towards completing the stated Objectives/Activity(ies) as outlined in the Agreement.

To complete the Work Plan Report:

- Navigate through the various objectives/ activities by clicking on the 'Arrow' buttons. Or choose the Objective/Activity by clicking on the activity within the expandable tree directory located on the left side of the screen.

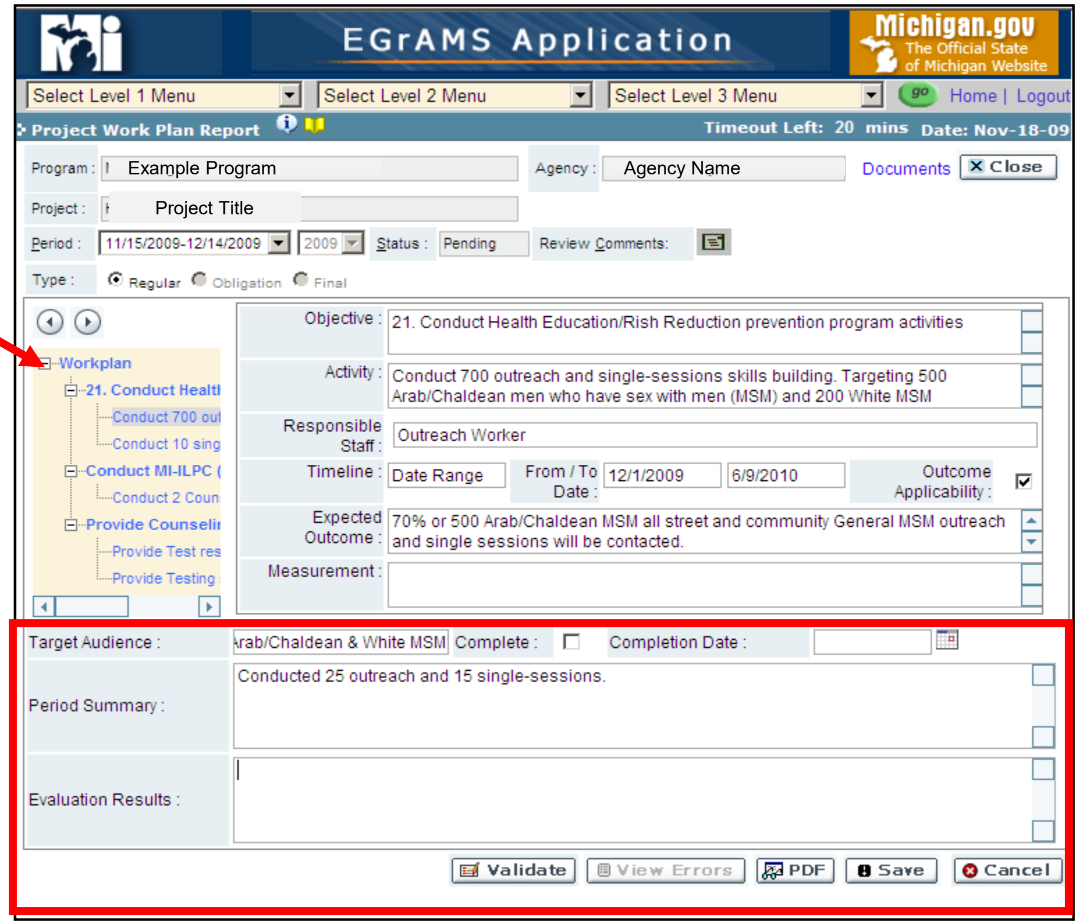
- Move through each Objective to report against each activity. Enter the Target Audience, Performance Summary and Evaluation Results.

  - If an activity has been completed for the **entire grant period**, check the box next to 'Completion' and enter the 'Completion Date' for the Activity.

- Click the 'Save' button to save changes.

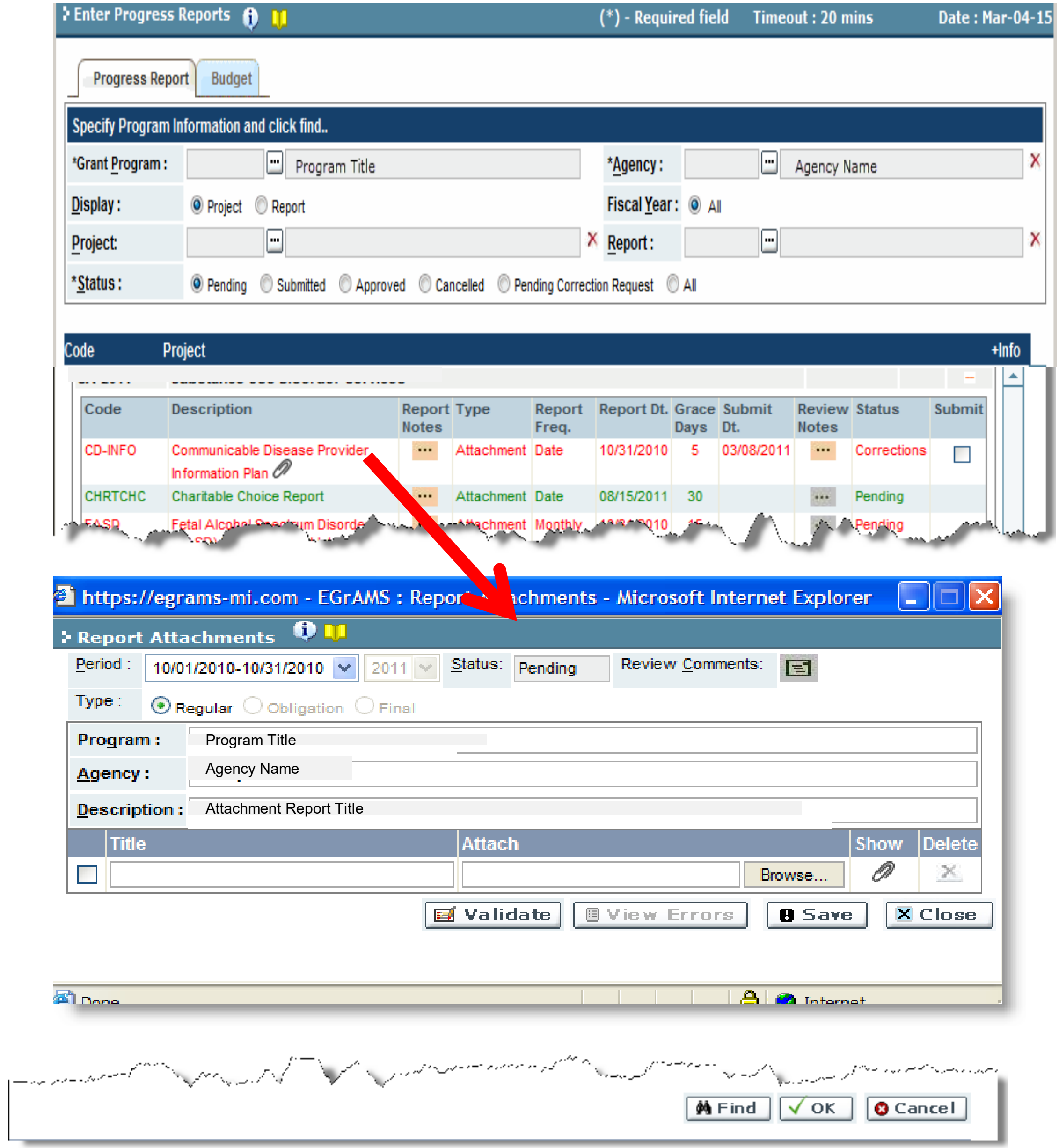
- **Click the 'Validate' button to check for errors (refer to page 87).**

- ***NOTE:*** The system will display the selected Objective, Activity, Responsible Staff, and Timeline information as contained in the Agreement's Attachment A – Statement of Work.



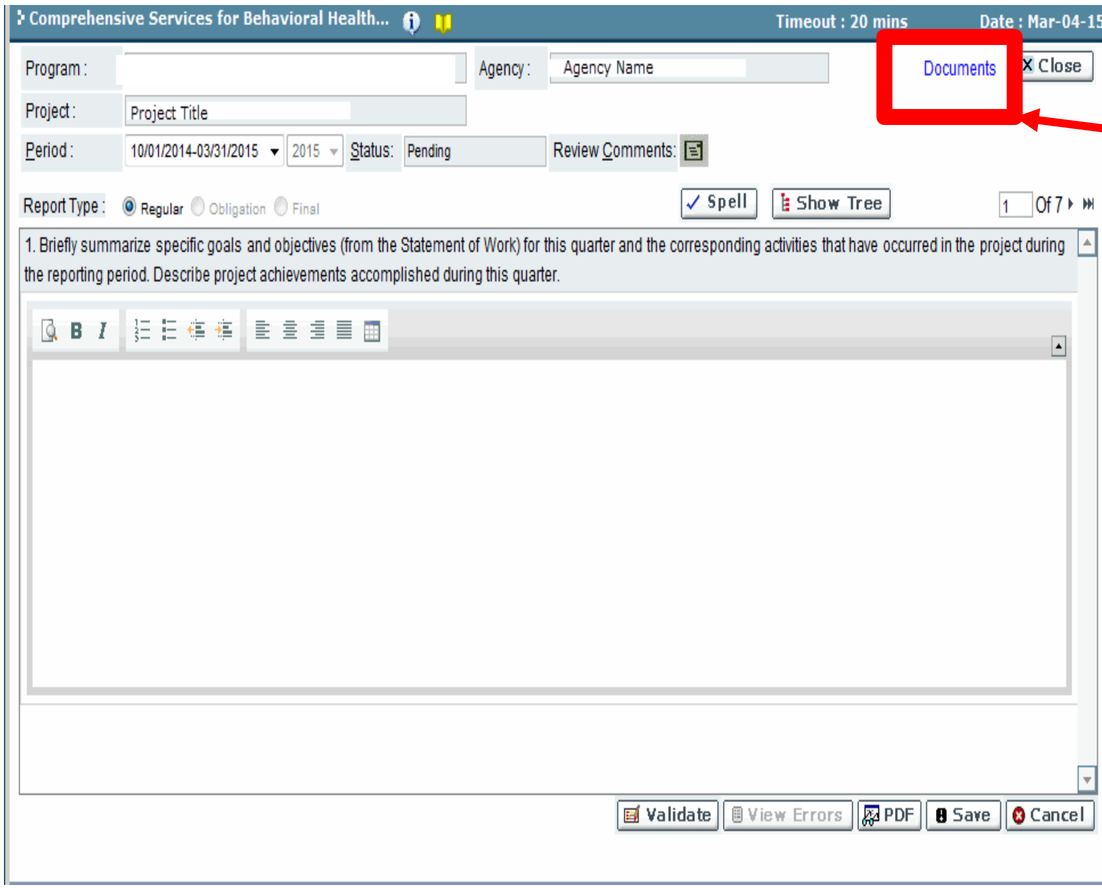
Attachment Report

- Click on the hyperlink to open the attachment report.
- Enter the ‘Title’ of the report.
- Click the ‘Browse’ button, to locate the file from your local system to be attached.
- Click the ‘Save’ button to save changes.
- Click the ‘Paper Clip’ icon to view the uploaded attachment.
- Click on the ‘Close’ button.
- Submit this report from the Progress Report screen (refer to page 88).
- MDHHS Staff will review and approve, or reject the report back for Corrections.



Narrative Report

To track the progression of some Projects, MDHHS Staff have developed Narrative Progress Reports.



Follow the instructions <u>before</u> completing each report. Instructions can be found in a few locations:

- The 'Documents' hyperlink provides a listing of Report instructions.
- Instructions are listed on the screen within the Report, as shown below.
- Click the 'Information' icon for instructions on how to complete the specific question.

To complete the report:

- Enter or cut and paste the narrative information as requested for the Report.
- Click the 'Save' button to save changes.
- **Click the 'Validate' button to check for errors (refer to page 87).**

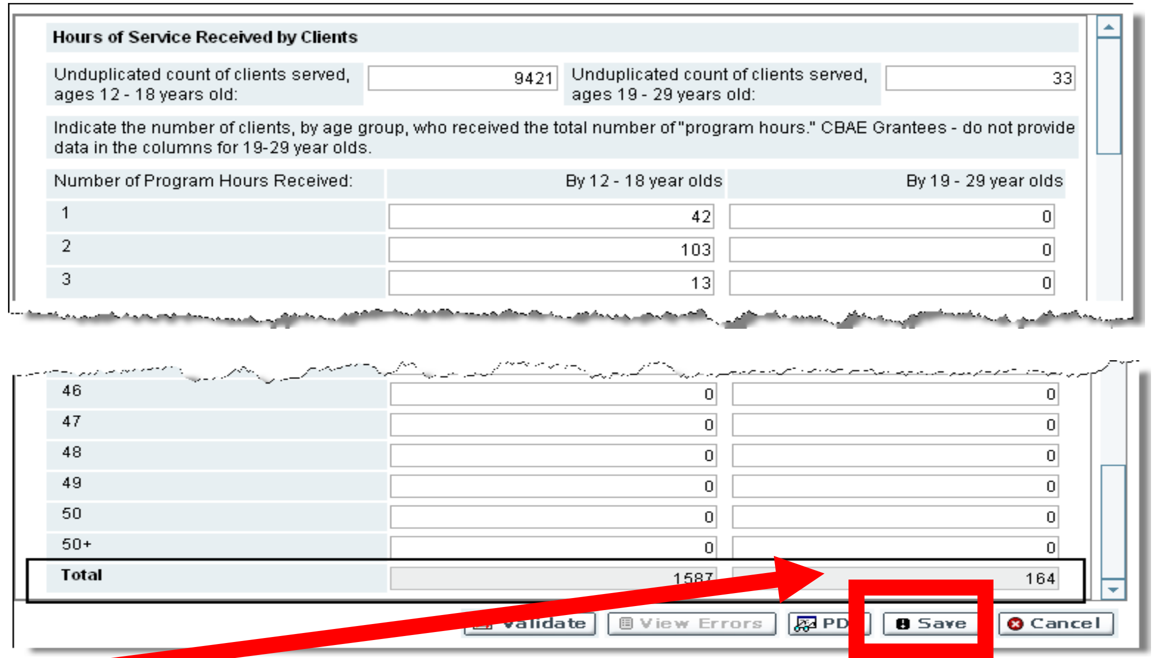
Statistical Reports

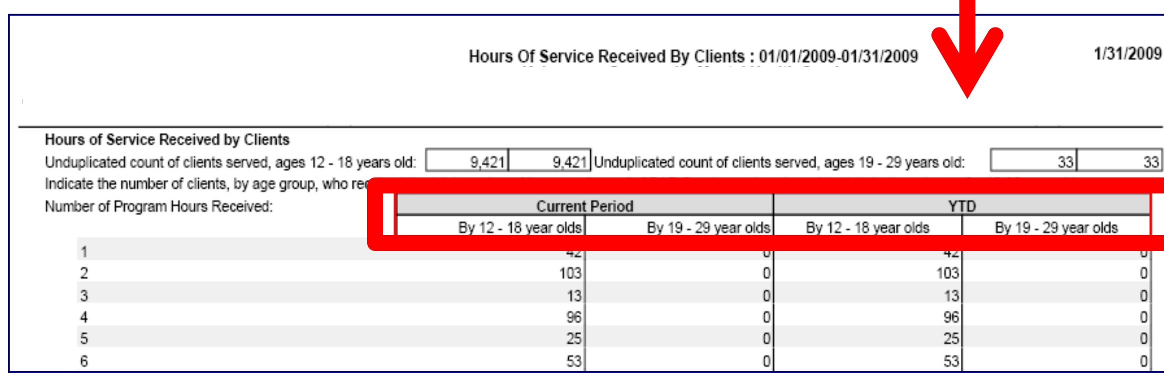
- Enter the data as requested for each report.
- Click the ‘Save’ button to save change.

NOTE: The system will not calculate the totals until the ‘Save’ button is clicked. Each time a change is made to a numeric field, re-click the ‘Save’ button to update the total(s).

- Click the ‘Validate’ button to check for errors (refer to page 87).
- Submit this report from the Progress Report screen (refer to page 88).
- The Report is then reviewed and approved, or rejected for Corrections, by MDHHS Staff.
- Click the ‘PDF’ button to view or print the report.

  Note: The printed report will show the current period and the Year-To-Date (YTD) totals, for the given Reporting period.





Progress Reports

- Understanding the Progress Reports
  - Inside Progress Reports
    - Action Buttons
    - Validate Progress Report
    - Print Progress Reports
  - Reporting, Attachments, & Submission
- Type of Progress Reports
  - Financial Status Report (FSR)
  - Statement of Work
  - Narrative Report
  - Statistical Report

Questions?

Technical Support Contacts:

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