Comprehensive Agreement
MI E-Grants
GRANTEE TRAINING

Presentation by

Brenda Roys, MDHHS

MI E-Grants Training Overview

- Getting Started with MI E-Grants
- Grantee Flow Chart & Project Application
- Project 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**.
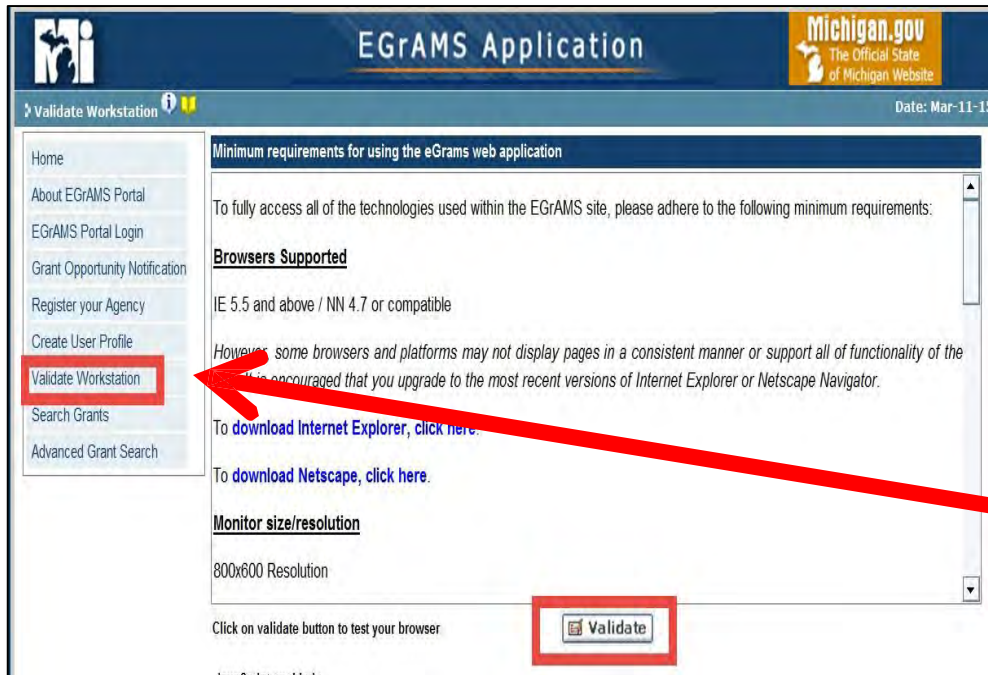
- Validating your workstation is a necessary step to ensure that your computer set up is compatible with the MI E-Grants program.

- 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 MI E-Grants System Administrator:
Brenda Roys at RoysB@michigan.gov or 517-373-1207**

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 System Administrator:
  Brenda Roys
  517-373-1207
  RoysB@michigan.gov
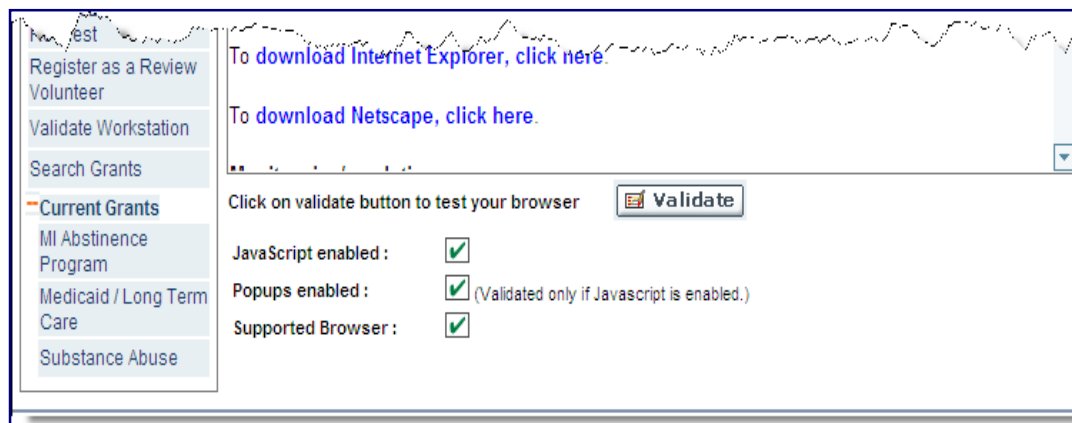
Passed
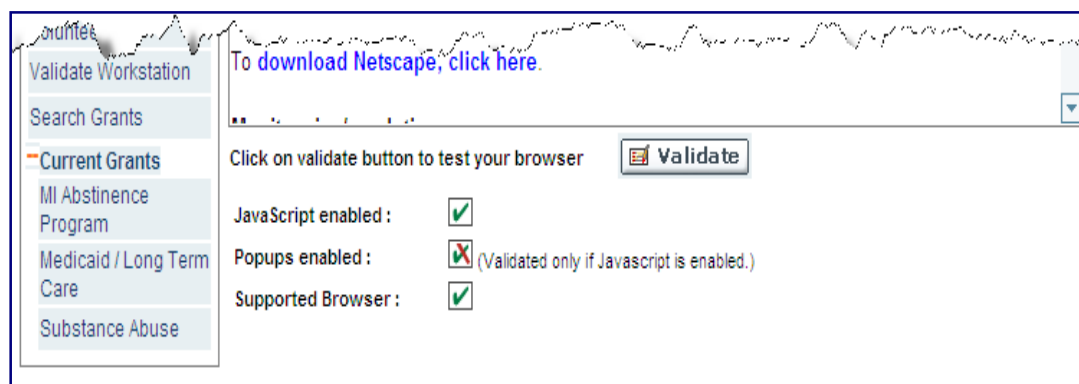
Failed

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

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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: Do NOT contact HTC or the DTMB Helpdesk with MI E-Grants issues. Contact MI E-Grants System Administrator: Brenda Roys at <u>RoysB@michigan.gov</u> or 517-373-1207

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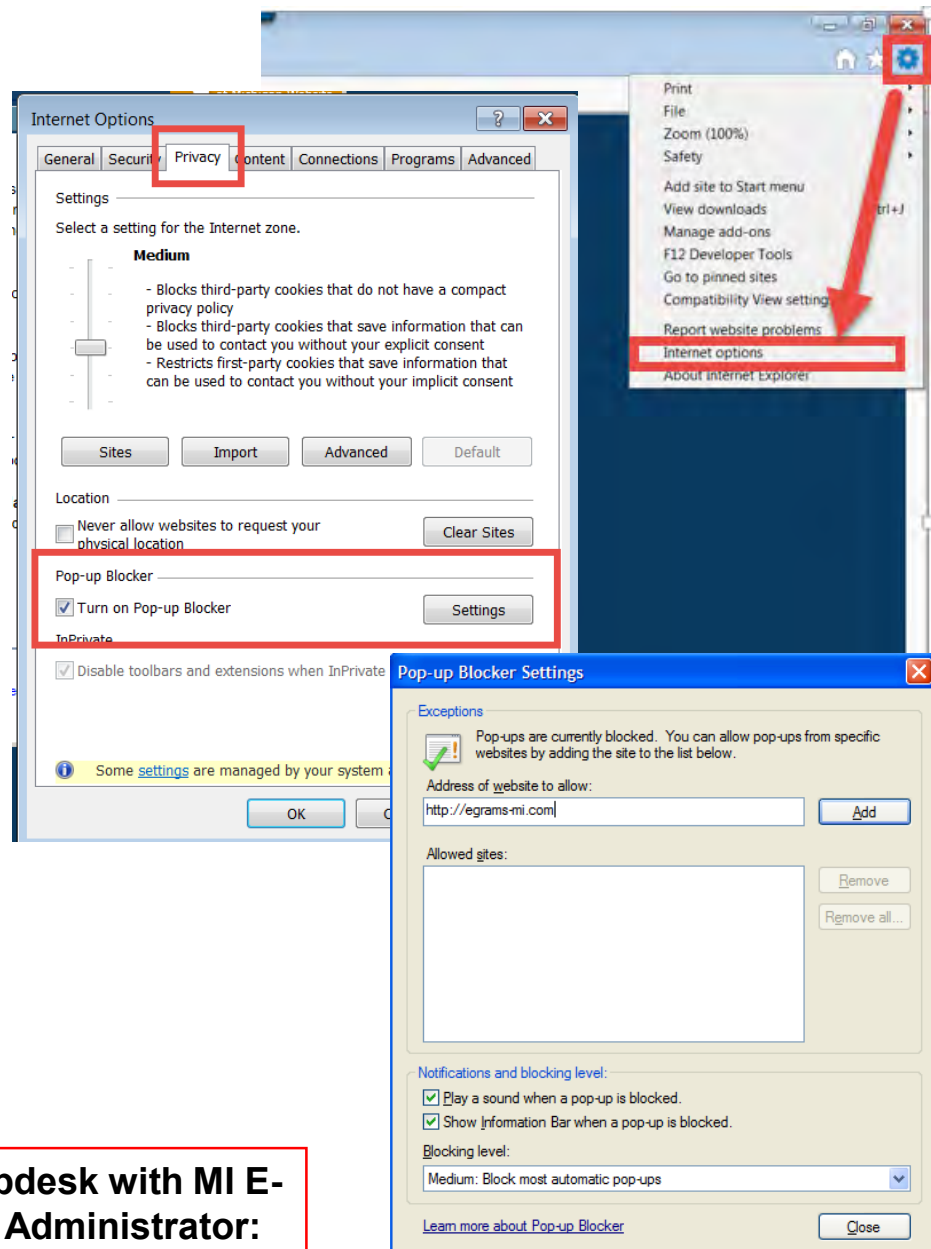
How to Create a User Profile:

- 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 Community Health*' 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.

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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.*

- *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.*
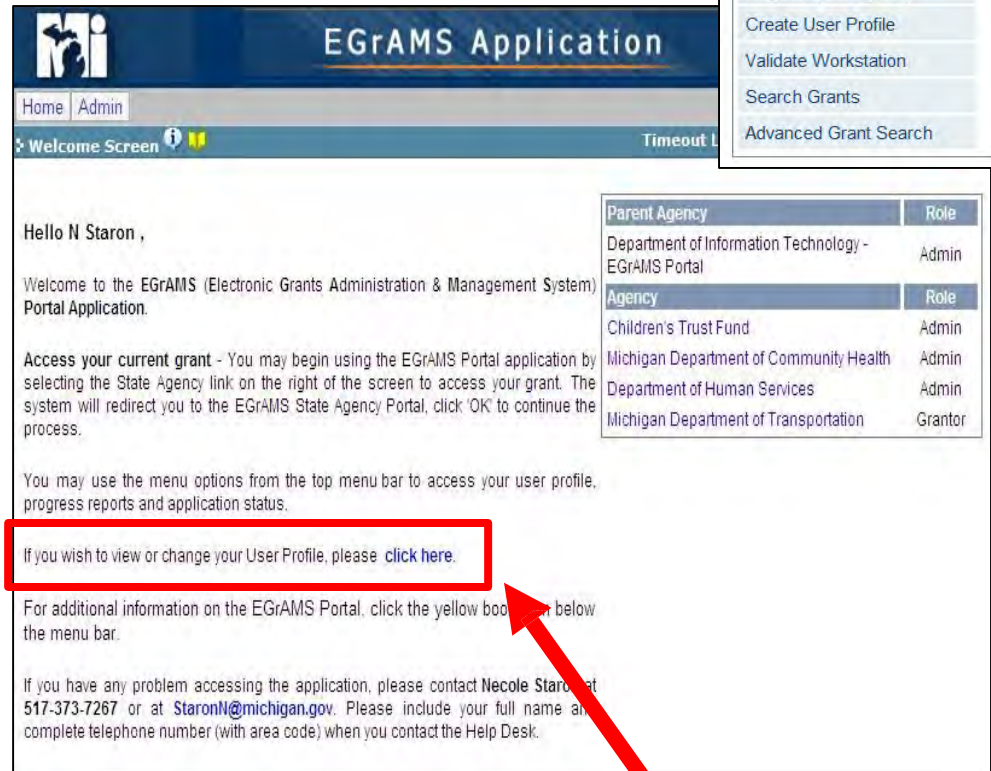
Managing your User Profile

- 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 <u>not</u> on the DCH website.

> **Application Home**
> Home
> About EGrAMS Portal
> EGrAMS Portal Login
> Grant Opportunity Notification
> Register your Agency
> Create User Profile
> Validate Workstation
> Search Grants
> Advanced Grant Search

EGrAMS Application

Home | Admin

Welcome Screen   Timeout L

Hello N Staron ,

Parent Agency	Role
Department of Information Technology - EGrAMS Portal	Admin

Agency	Role
Children's Trust Fund	Admin
Michigan Department of Community Health	Admin
Department of Human Services	Admin
Michigan Department of Transportation	Grantor

Welcome to the EGrAMS (Electronic Grants Administration & Management System) Portal Application.

Access your current grant - You may begin using the EGrAMS Portal application by selecting the State Agency link on the right of the screen to access your grant. The system will redirect you to the EGrAMS State Agency Portal, click 'OK' to continue the process.

You may use the menu options from the top menu bar to access your user profile, progress reports and application status.

If you wish to view or change your User Profile, please click here.

For additional information on the EGrAMS Portal, click the yellow boo   below the menu bar.

If you have any problem accessing the application, please contact **Necole Star**   at 517-373-7267 or at StaronN@michigan.gov. Please include your full name a   complete telephone number (with area code) when you contact the Help Desk.

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: Oct-29-09**
From : christnert@michigan.gov	Sent : Oct-29-09 01:42:20 PM

To :   sclay@nso-mi.org

Subject :   User Activation for Sheilah Clay in MDCH MI E-Grants

Message :

Dear Sheilah Clay,
Neighborhood Services Organization

Your user profile with user_name sclay has been activated in the MI E-Grants application. You may log into the Mi E-Grants application and access the various functions based on your role. Please note that access at a grant program level is granted by your system administrator.

You may change your user information after logging in to MI E-Grants Portal http://egrams-mi.com/portal . Please note that Role and Parent Agency can only be changed by the MDCH MI E-Grants System Administrator, Sean Eddy at (517) 241-1076 or EddyS@michigan.gov.

MDCH MI E-Grants System Administrator

[Send Email]   [X Close]

If you have any problem getting started using MI E-Grants, contact the

MI E-Grants MDHHS System Administrator: Brenda Roys at 517-373-1207 or roysb@michigan.gov.

Do *NOT* contact the DTMB Helpdesk or HTC Helpdesk.

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 MDHHS 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.

Getting Started with MI E-Grants

☐ Navigating within 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 **not** work properly using <u>any other Browers</u> (such as: Google Chrome, FireFox, Safari, etc.)
- ☐ Type in the **DCH** website URL address: **http://egrams-mi.com/dch**

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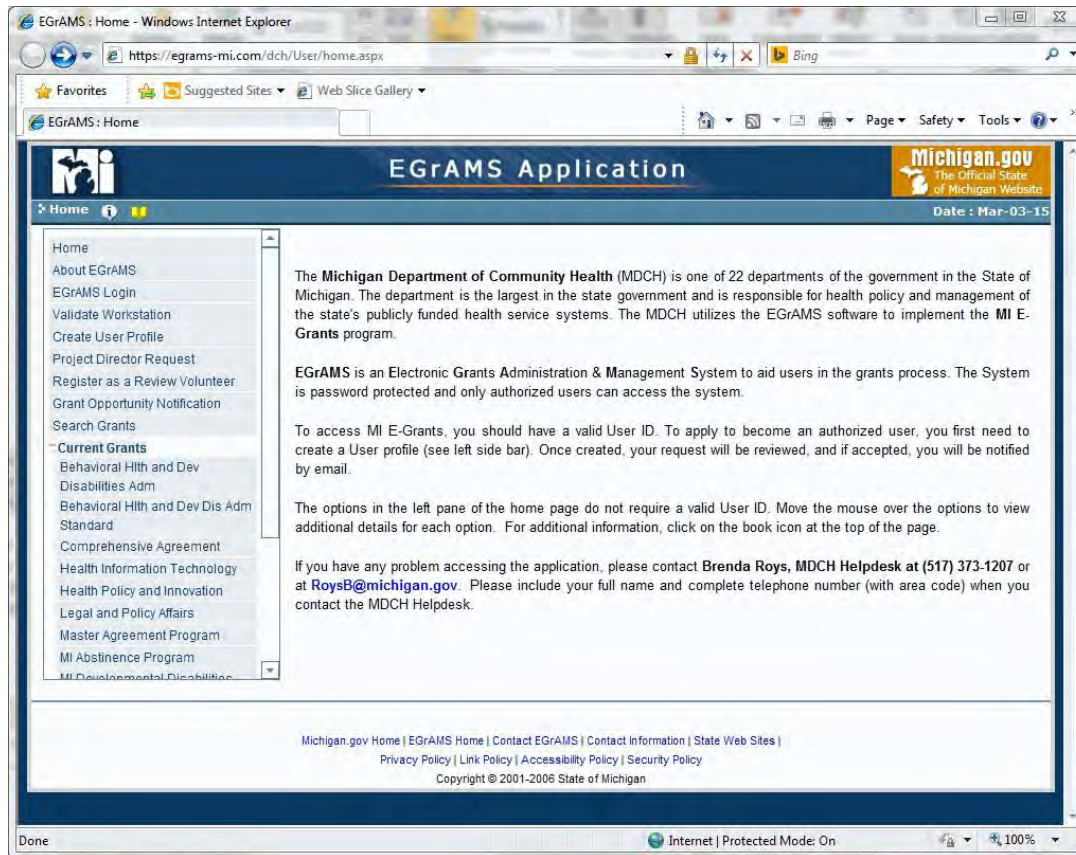
Header – Browser controls, Application logo; constant for all screens.

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 Date

Current Grants – Provides a listing of current Grant Programs.
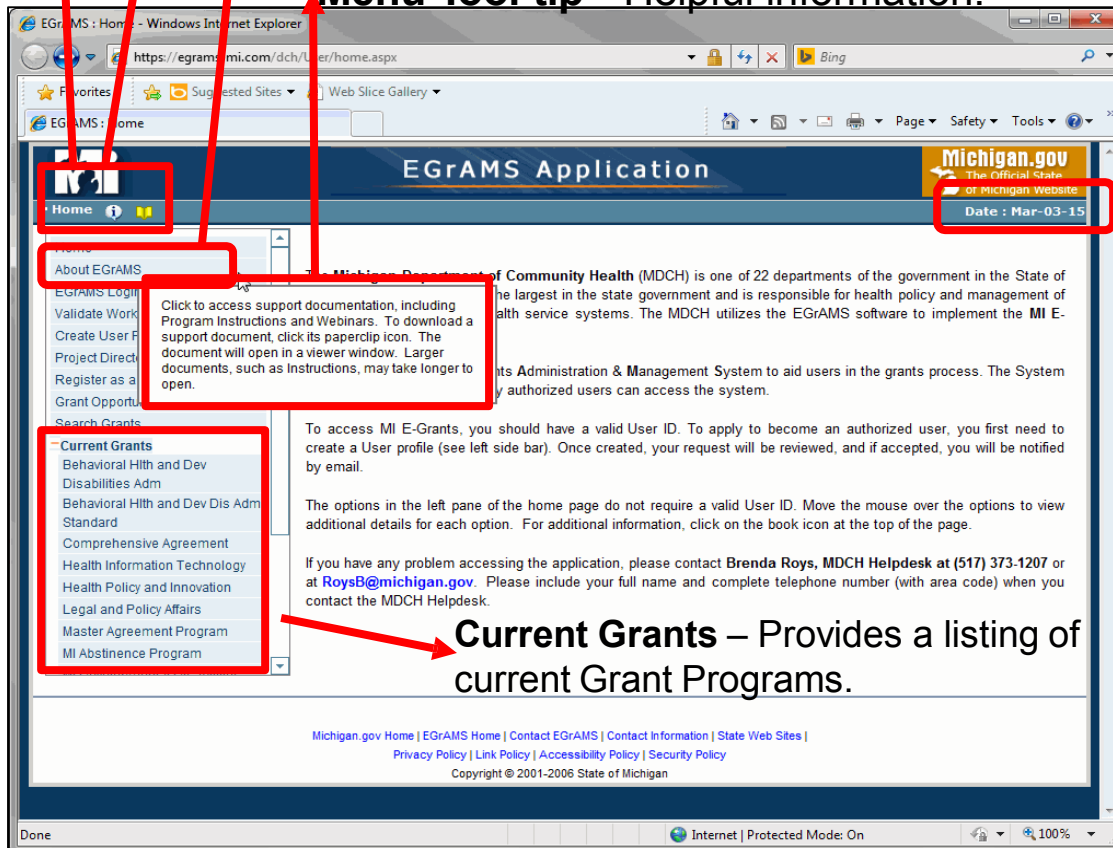
NOTE: To access the MI E-Grants system, you need.:

■ 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.

Click the 'Program' hyperlink to access program specific information and related documentation .

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.
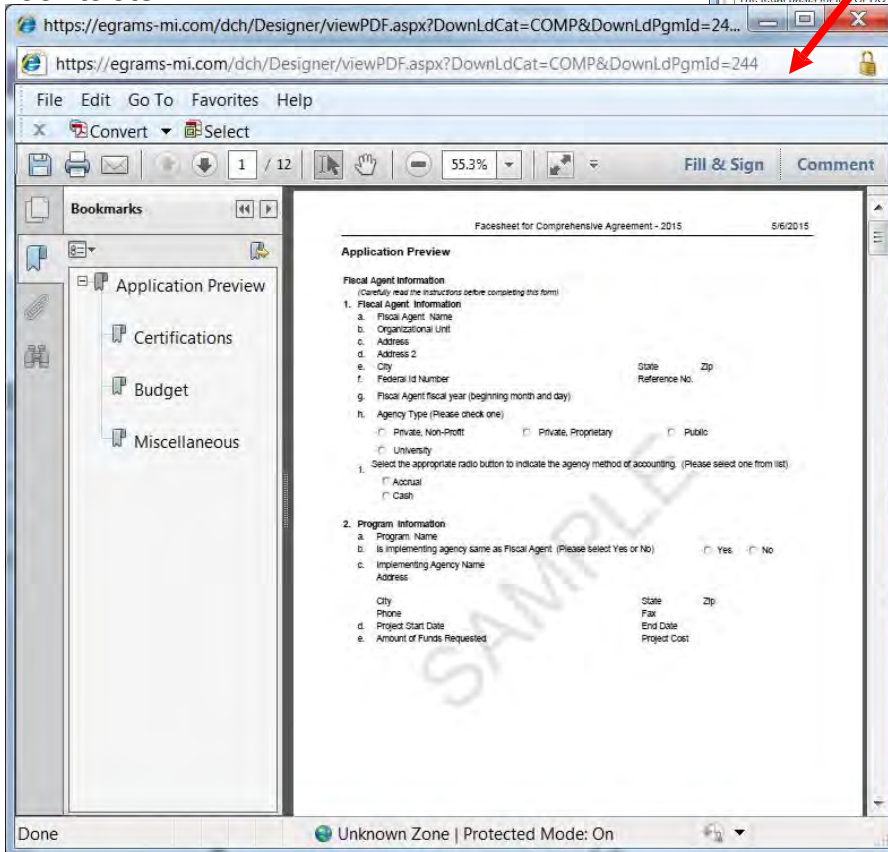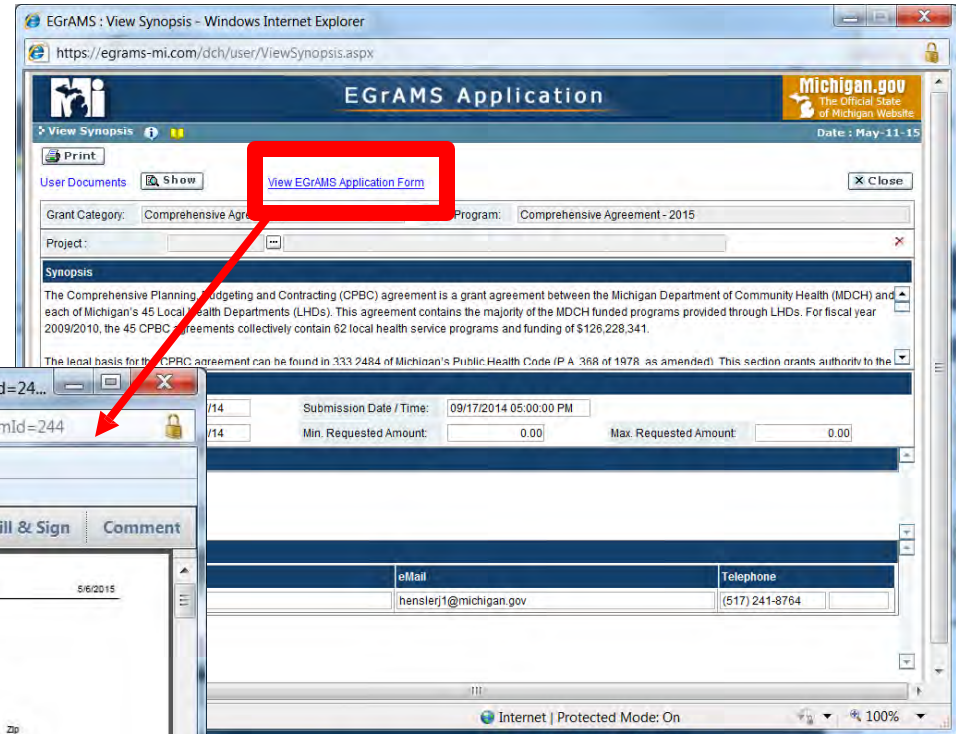
Current Grant Review

■ 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.
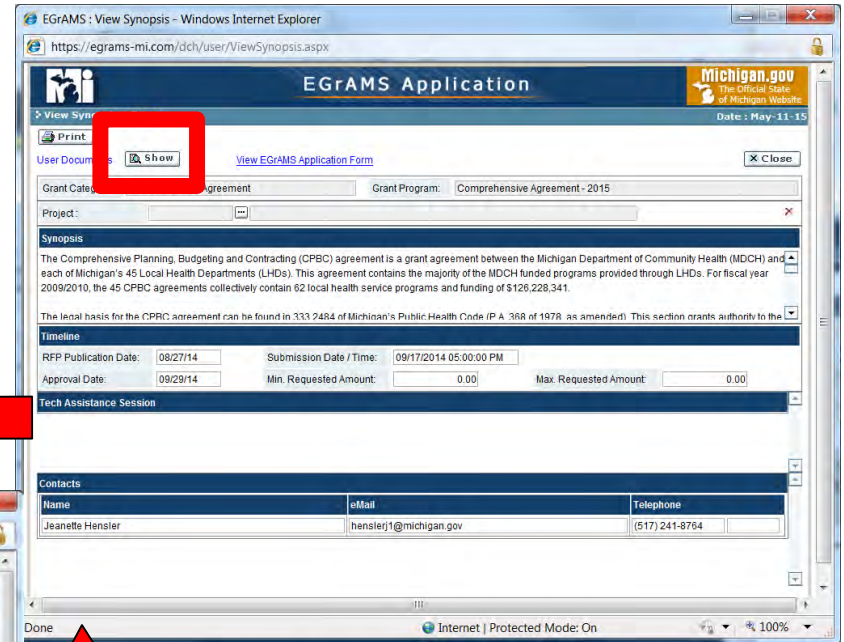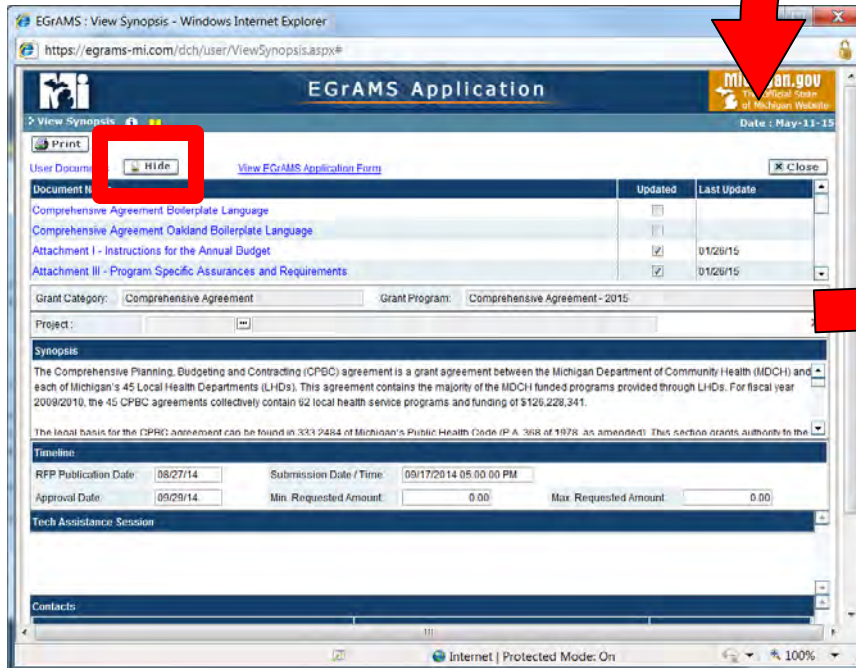
Navigating within MI E-Grants

- Learning the basic MI E-Grants Navigation techniques will enable the User to access needed information quickly by narrowing the search criteria.
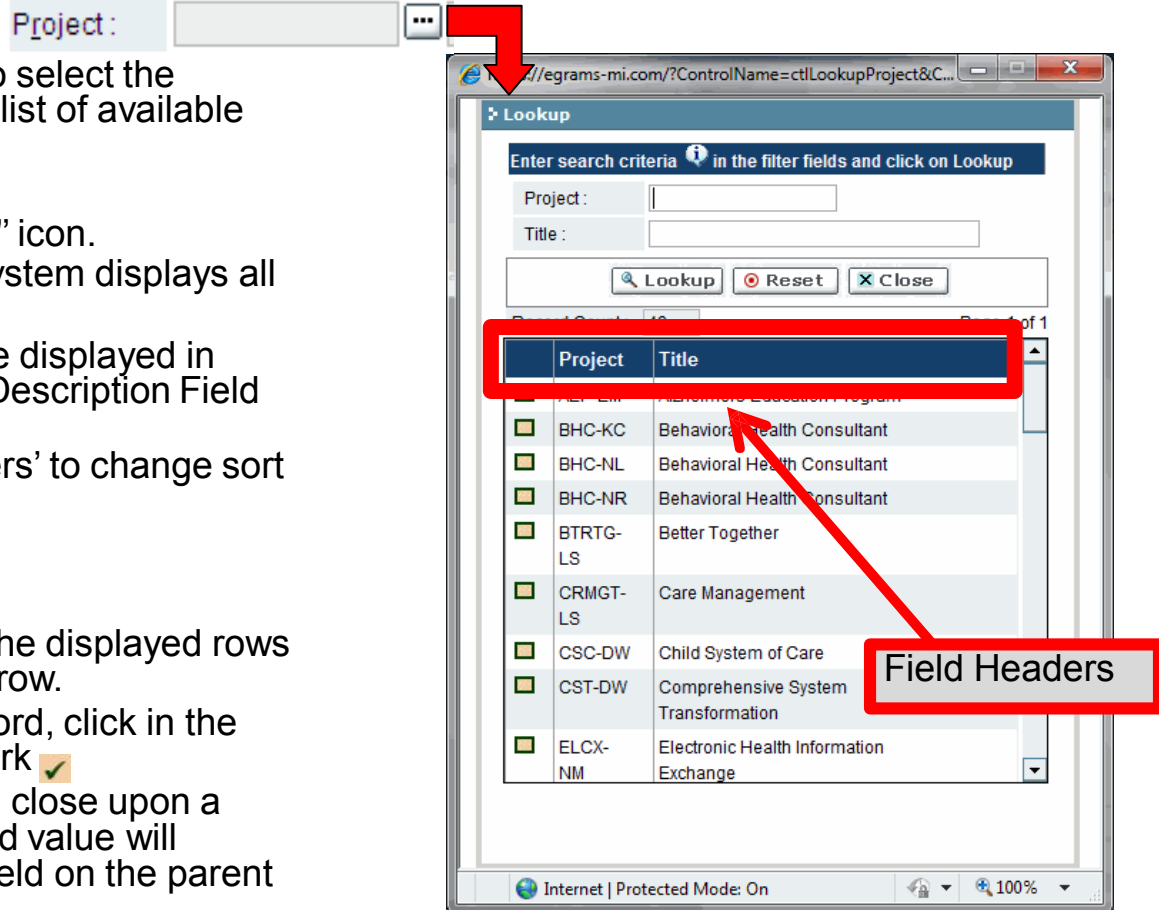
- **Value 'Lookup's**
  - 'Lookup's enable users to select the appropriate value from a list of available choices.
- **Invoking a 'Lookup'**
  - Click on the [...] "Lookup" icon.
  - Based on the field, the system displays all available values.
  - The available choices are displayed in ascending order 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 Fields

- Search Criteria 'Lookup's

  - 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.

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.

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Navigating within MI E-Grants

- **Calendar 'Lookup's -** Calendar 'Lookup's 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.
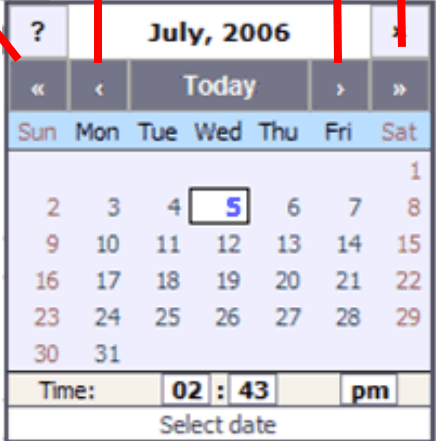
- **Invoking a Dropdown**
  - ☐ Click on the 'Dropdown' icon to view a list of available values.

- **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.
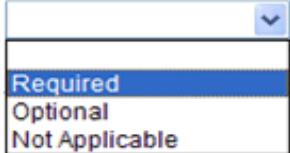
Click to view same month, next year

Click to view next month

Click to view previous month

Click to view same month, previous year

?	July, 2006	
«	‹	Today	›	»
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					
Time:	02 : 43		pm
Select date			

Required
Optional
Not Applicable

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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.
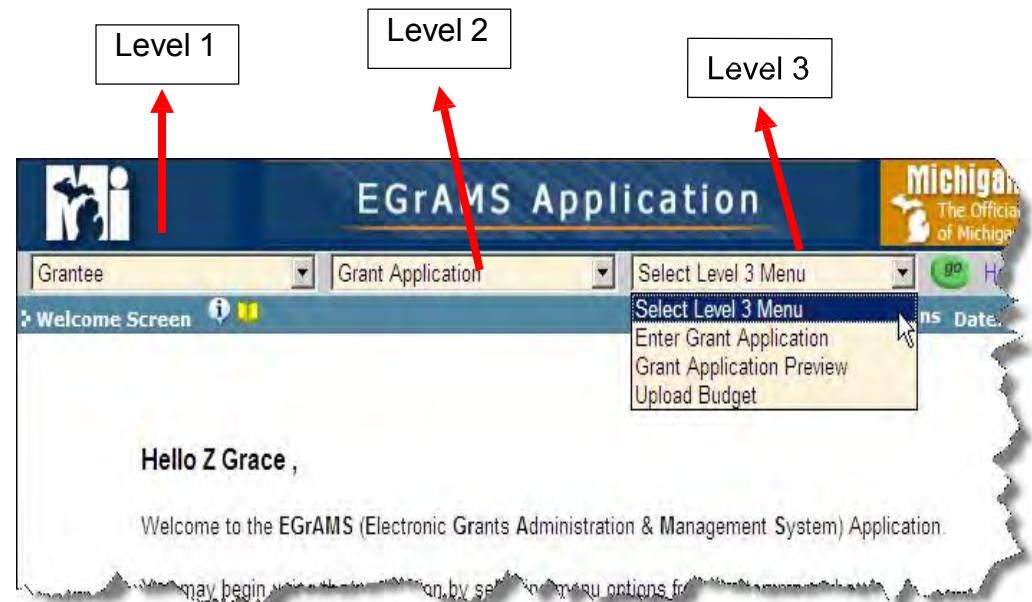
Menu Styles

- 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 11 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).

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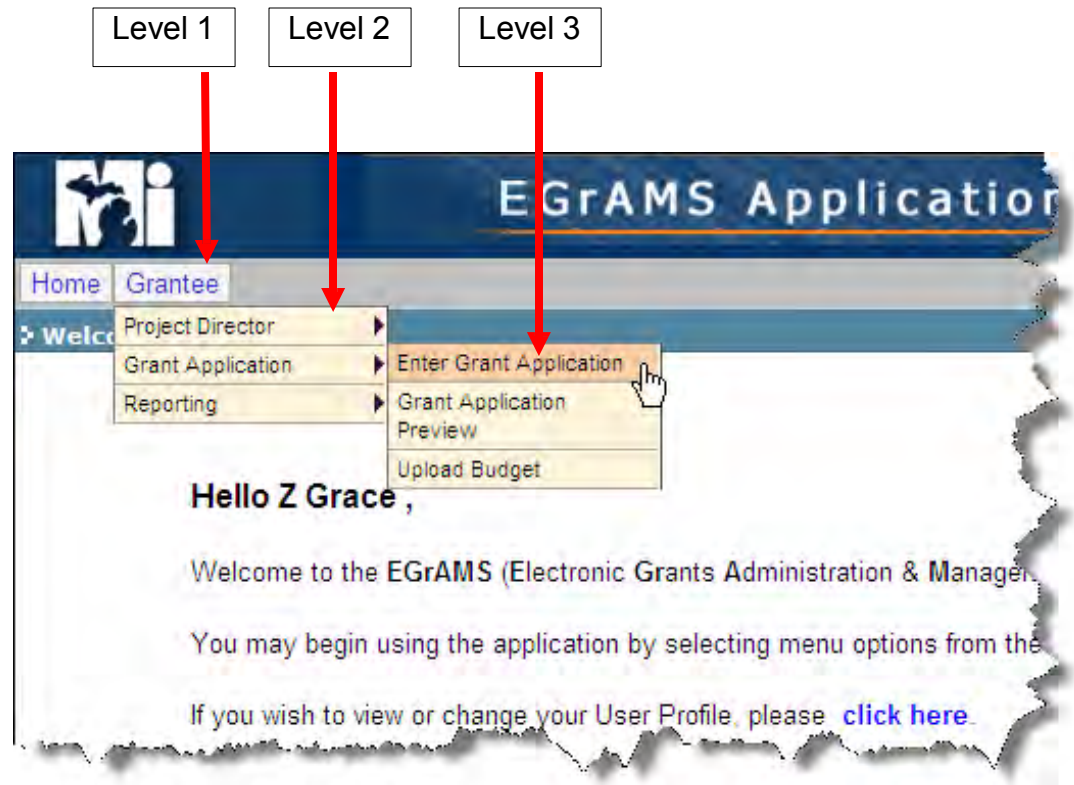
Menu Styles

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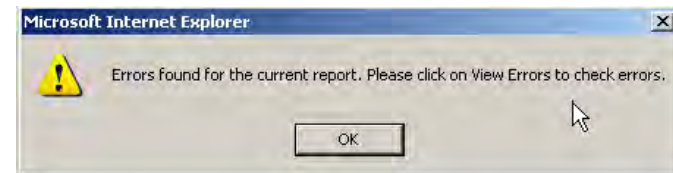
- **Confirmation Message:**
  - □ Displays a pop-up window with the appropriate error, warning, or confirmation message.
  - □ Provides the User a choice to confirm or cancel a certain action.
  - □ Click on 'OK' to confirm.
  - □ Click on 'Cancel' to cancel the action.

Microsoft Internet Explorer

⚠ Errors found for the current report. Please click on View Errors to check errors.

OK

Microsoft Internet Explorer

⚠ Amount for PCA 97720 (400.00) is less than disbursed amount 1,442.44

OK

Microsoft Internet Explorer

❓ This action would promote the Grant Application to the next stage Do you want to continue?

OK   Cancel
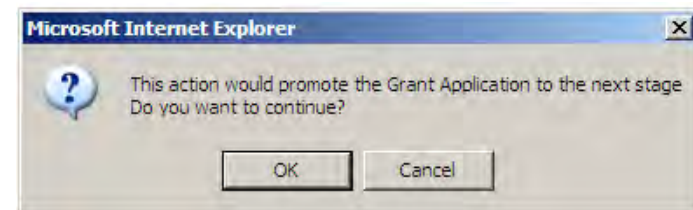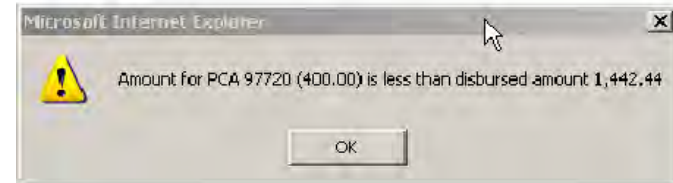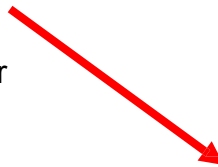
A Word of Caution

- **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.

Never use 'Back' button

Never use 'Refresh' button

Beware of 2 minute warning

'Logout' link when done

Information Warning Message
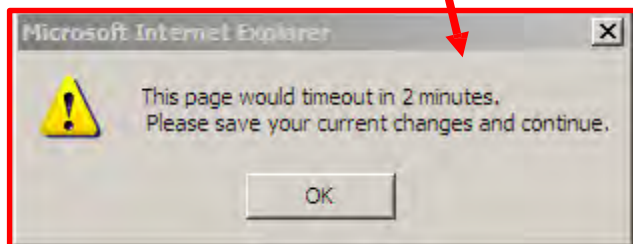
Use 'Find' button to refresh

Getting Started with MI E-Grants

☐ 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**

   These codes determine what Permissions are given to each User:

   ☐ **Project Director** – 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 –** oversees financial operations and submits financial reports for your Agency.

   ☐ **Authorized Official –** 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: Do NOT contact HTC or the DTMB Helpdesk with MI E-Grants issues.**
> **Contact MDHHS E-Grants System Administrator:**
> **Brenda Roys at <u>RoysB@michigan.gov </u>or 517- 373-1207**

Activate and Assign Agency Users to a Project

- Only the **Project Director** from the Grantee Agency is authorized to perform this function within the system.

- Navigate to: **Grantee -> Project Director -> Assign User to Projects** and click the 'Go' button.

- The system will display the 'Assign User to Projects' screen, as shown below.

- Click the 'Setup' button.

- **Grant Program:** Select a Grant Program using the "Lookup" icon.

- **Agency:** System displays pre-populated information.

- **User:** Select a 'User' from the "Lookup" icon. (All registered Users of the system for your agency will appear on 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 MDHHS System Administrator.

- **Role:** System has pre-populated information.

- *NOTE: The system requires that each Agency identifies a "Project Director," for their Agency.*

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Activate & Assign Agency Users to a Project/Program Elements

- Permission: Select a 'Permission' from the "Lookup" icon:

  □ **1 - Project Director** – Responsible for performing administrative tasks and assigns permissions at an application level.

  □ **2 - Grant Writer** - Responsible for entering application information.

  □ **4 - Financial Officer** – Responsible for entering financial information. Oversees financial operations and submits financial reports.

  □ **5 - Reports Administrator** – Responsible to complete and submit non-financial reports.

  □ **9 - Authorized Official** – Authorized to sign binding agreements on behalf of the agency.

- Click the 'Find' button.

Note: Do NOT contact HTC or the MDIT Helpdesk with MI E-Grants issues.
Contact MDHHS E-Grants System Administrator Brenda Roys at RoysB@michigan.gov or 517- 373-1207

Activate & Assign Agency Users to a Project/Program Elements

- System displays the available project applications for the selected grant program.
- Until a **Project Director** activates & assigns a user, the user's status is inactive, and they are unable to access the system.

- **Delete**: Allows a user to be deleted from a selected program element. (Step can only be done, after a user has been assigned to a project title).
  - □ Select the 'Red X' icon, which turns into a 'Red Trash Can' icon.
  - □ Click the 'OK' button.

- **Project**: System displays the project codes for the various program elements.

- **Project Title**: Displays the Name of the Program Element Application.

- **Status**: Allows the user access to the system and the program elements,
  - □ To grant permission access to all program elements select check box next to status in the header or
  - □ To grant selected permission to only selected program elements, click only the boxes in the status column for the selected program elements.

Activate & Assign Agency Users to a Project/Program Elements

- Permission Roles have been pre-populated, from the search criteria section. The **Project Director** can re-assign permission roles by project for a selected user, by using the field 'Lookup' button in the Permission column.

- **Permission:** Allows the user access to the project application.
- The system will pre-populate the User Permission, only if a permission level was selected in the search criteria.
- To change the User Permission for a program element application, use the 'Lookup' icon and select the desired Permission:

  □ Project Director – Responsible for performing administrative tasks and assigns permissions at a application level.

  □ Financial Officer – Responsible for entering financial information. Oversees financial operations and submits financial reports.

  □ Authorized Official –Authorized to sign binding agreements on behalf of the agency.

  □ Reports Administrator – Responsible to complete and submit non-financial reports.

  □ Grant Writer - Responsible for entering application information.

Activate & Assign Agency Users to a Project/Program Elements

■ The **Project Director** is able to restrict a user's access to a program element application by limiting access to specific application section levels.

■ To Assign access:
  □ **Cat. Appl.:** Check the box in the 'Category Application. This will enable the selection of the category icon specifying further restrictions.
  □ **Category:** Click the 'Additional Information' icon (The system will display a pop-up window of the section category screen).

■ Section Category Screen
  □ Section: System Section code (do not edit).
  □ Section Description: Application Section/Tab Name (do not edit).
  □ **Access:** Click on the appropriate radio button to restrict/assign user Access:
    ■ **Read:** Read only view of application Section/Tab.
    ■ **Write:** Write to the application Section/Tab.
    ■ **NA:** No Access to the application Section/Tab.
    ■ Click 'OK' to save change.
    ■ Click 'Close' to the window.

■ Repeat process for <u>each</u> project application that the user requires access too.

■ Click 'OK' to save change.

■ Click 'Cancel to discard.

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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 MDHHS 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;
  - □ The system has a check that once changed your password cannot be changed for a minimum of **'3' (three)** 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.
  - □ 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 MDHHS System Administrator.
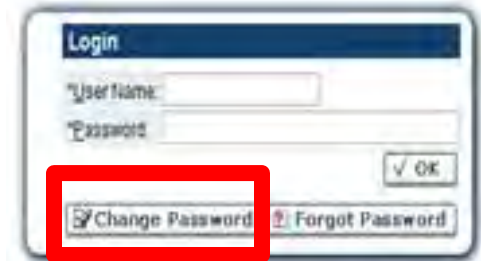
Forgot Password

- You may use 'Forgot Password' function, if:
  - □ Your password has expired.;
  - □ You want to change your password, but you cannot remember your old password.
    - The system has a check that once changed, your password cannot be changed for a minimum of **'3' (three)** days.

- 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.
  - □ Click 'OK' to save your new Password.
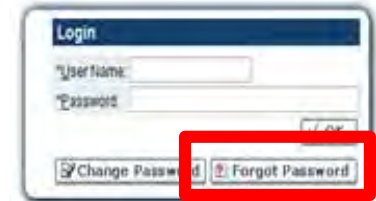 - □ Click 'Cancel' to discard the change.

- 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 MDHHS System Administrator.

For MI E-Grants issues:
Contact MDHHS E-Grants System
Administrator Brenda Roys
at RoysB@michigan.gov or 517-373-1207

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■ **Getting Started with MI E-Grants**

☐ Becoming a MI E-Grants Users

- ■ 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:
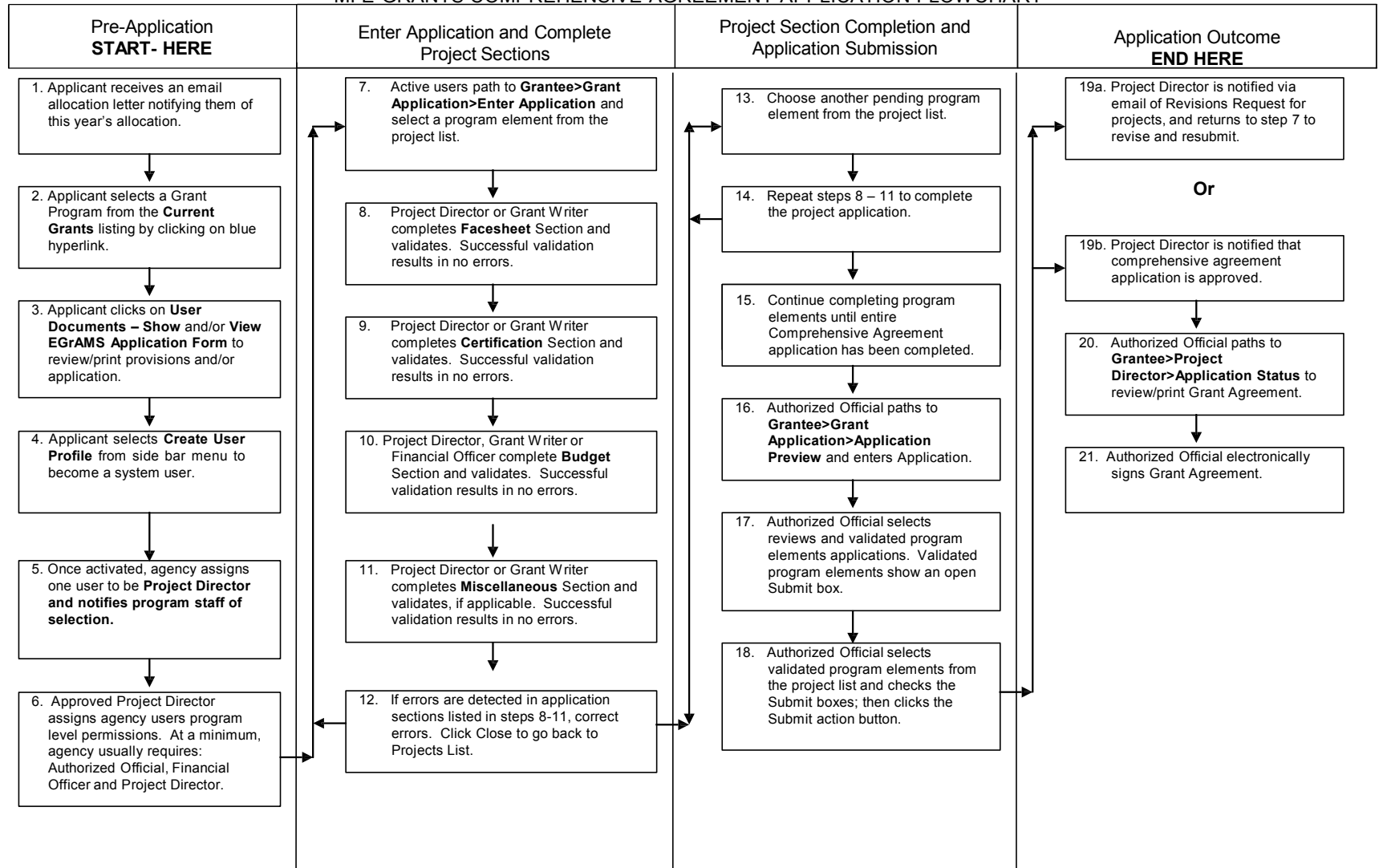 **http://egrams-mi.com/dch**

Questions ?

- **Grantee Flow Chart**

- **Program Element Application**
  - ☐ Allocation Notification
    - Email Notification
  - ☐ Understanding Application Tools
    - Application Sections (Tabs)
    - Action buttons
    - Validate Application for Errors
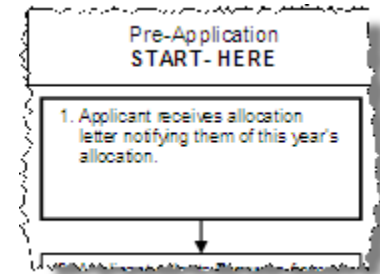 - ☐ Program Element Application Entry

Comprehensive Agreement Grantee Flow Chart

MICHIGAN DEPARTMENT OF COMMUNITY HEALTH
MI E-GRANTS COMPREHENSIVE AGREEMENT APPLICATION FLOWCHART

Pre-Application START- HERE	Enter Application and Complete Project Sections	Project Section Completion and Application Submission	Application Outcome END 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 Form** 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.

7. Active users path to **Grantee>Grant Application>Enter Application** and select a program element from the project 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, Grant Writer or Financial Officer complete **Budget** Section and validates. Successful validation results in no errors.

11. Project Director or Grant Writer completes **Miscellaneous** Section and validates, if applicable. Successful validation results in no errors.

12. If errors are detected in application sections listed in steps 8-11, correct errors. Click Close to go back to Projects List.

13. Choose another pending program element from the project list.

14. Repeat steps 8 – 11 to complete the project application.

15. Continue completing program elements until entire Comprehensive Agreement application has been completed.

16. Authorized Official paths to **Grantee>Grant Application>Application Preview** and enters Application.

17. Authorized Official selects reviews and validated program elements applications. Validated program elements show an open Submit box.

18. Authorized Official selects validated program elements from the project list and checks the Submit boxes; then clicks the Submit action button.

19a. Project Director is notified via email of Revisions Request for projects, and returns to step 7 to revise and resubmit.

Or

19b. Project Director is notified that comprehensive agreement application is approved.

20. Authorized Official paths to **Grantee>Project Director>Application Status** to review/print Grant Agreement.

21. Authorized Official electronically signs Grant Agreement.

Allocation Notification Email

- MDHHS Publishes Comprehensive Agreement Application
- Comprehensive Agreement Agency staff receives a system generated email which specifies project allocation information

Pre-Application
START- HERE

1. Applicant receives allocation letter notifying them of this year's allocation.

Email Information			Date: Jun-16-10

From : christnert@michigan.gov   Sent : Jun-16-10 09:44:34 AM

To : staronn@michigan.gov

Subject : Fiscal Year (FY) 2010 Projected Allocations

Message :

June, 16 2010

Ava Connor, Director
Alabama Center
456 W. End Drive
Southgate, MI 48195

Dear Ava Connor:

Subject: Fiscal Year (FY) 2010 Projected Allocations

This letter transmits projected allocations for your Coordinating Agency (CA) from the Community Health, Community Health (DCH/000000) for FY 2010. These allocations are subject to the availability of funds, the Appropriations Act for the Department for FY 2009, Department approval, and approval by the State Administrative Board.

The allocation line amounts and the total allocation amount of state-administered funds are as follows:

Title	Division	Type	Allocation $
Assessment Feedback Incentive Exchange- Comprehensive	EPI	Fixed Unit Rate	0.00
Bioterrorism Emergency Preparedness	OPHP	Allocation	137,051.00
CSHCS - Outreach and Advocacy	DFCH	Allocation	40,000.00
CSHCS Care Coordination	DFCH	Fixed Unit Rate	0.00
Family Planning - General Services	DFCH	Performance	82,909.00
HIV AIDS Prevention - Non-categorical	BHWD	Fixed Unit Rate	0.00
Immunization Action Plan	EPI	Allocation	39,561.00
Immunization Vaccine Handling/Replacement	EPI	Allocation	7,440.00
Local MCH	DFCH	Allocation	40,046.00
Sudden Infant Death Syndrome	DFCH	Fixed Unit Rate	0.00
VFC-AFIX Basic Provider Site Visit	EPI	Fixed Unit Rate	0.00
VFC-AFIX Comprehensive Site Visit	EPI	Fixed Unit Rate	0.00
VFC Provide Site Visits	EPI	Fixed Unit Rate	0.00
TOTAL			347,007.00

All allocations must be budgeted and expended consistent with requirements contained in the annual agreement.

If you have any questions concerning your allocation, please contact your contract manager.

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Application Entry Header
- Displays Agency, Grant Program, Application details and Show Documents.
- The header is displayed on all pages of the application.

Agency	Allegan County Health Department	Program :	Comprehensive Agreement - Final 6 08.04.10
Application :	Bioterrorism Emergency Preparedness - 10 months		Show Documents

Application Section Tabs
- Displays section tabs for the respective grant program element.
- Section tabs are displayed on all pages of the 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.

| Facesheet | Certifications | Budget | Miscellaneous | Index |
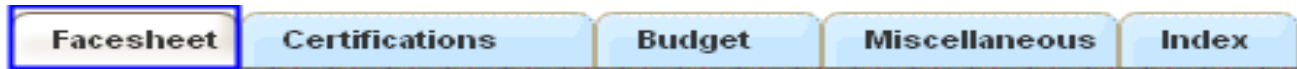
- The section tab which are gray color identifies restricted access to the program element application.

| Facesheet | Certifications | Budget | Miscellaneous | Index |

■ Application Section Tabs

□ Type of information stored in the various section tabs

• Demographics • Program • Contacts	• If applicable, various attachments, support letters, etc.

Facesheet	Certifications	Budget	Miscellaneous	Index

• Certification & assurance agreement

• Financial details for the supported expense categories
• Line Item details, if applicable
• Narratives
• Match details

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

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Action buttons

□ As the name suggests, the action button performs the desired task

Navigation buttons
- Allows you to navigate to the next or previous page.
- At the end of a section, it navigates to the next / previous section.

- Saves changes on a page two ways. Click on 'Save' to save the information on the current page.
- Click on **Save◆** to save the information and move to the next page of the application.
- If you try to navigate to the next page without saving your changes, the system will display a warning.

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

Save **Save◆** **Validate** **Errors** **PDF** **Copy**   **Show Tree** ◀ ▶

Click on Copy to copy information from a previous year's application.

Click on PDF to view a PDF of the current section.

- 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' 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.
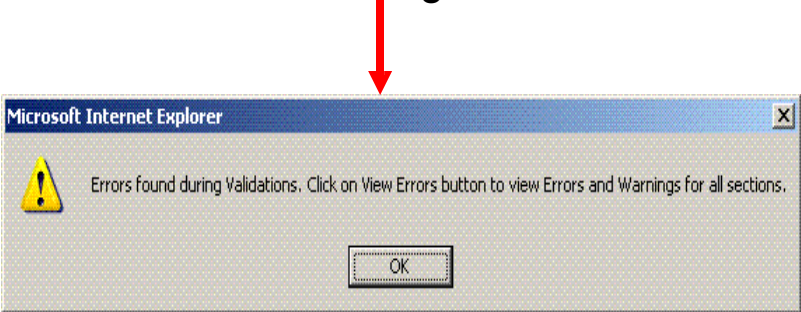
□ Acknowledge message and click the 'OK' button.

□ 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.

□ Check the Print Cause and Solution box and 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.

Microsoft Internet Explorer

⚠ Errors found during Validations. Click on View Errors button to view Errors and Warnings for all sections.

OK

EGrAMS : Errors and Warnings - Microsoft Internet Explorer

Errors and Warnings

Program Name: Program Title

Please select the criteria and click Find to Filter records....

Category: FIN [...] BUDGET   Error Type: ALL ▼   🔍 Find

	Category	Code	Description
☑	Budget	F005	Funds requested 91,739.00 does not equal budget amount 283,312.00
☑	Budget	F006	Project cost 91,739.00 does not equal budget + match amount 283,312.00
☑	Budget	F211	Budget amount 283,312.00 should not be greater than the requested revisions 91,739.00
☑	Budget	F109	Total requested amount 283,312.00 should be less than or equal to your agency allocation 91,739.00

☐ Print Causes and Solution   📄 PDF Preview   ✖ Close

Done   ✔ Trusted sites

Access Program Elelment 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, call the MDHHS MI E-Grants System Administrator:

    Brenda Roys
    (517) 373-1207
    roysb@michigan.gov

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Access the Comprehensive Agreement Program Elements Application

- 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: System pre-populates with agency information.

- Additional search criteria allows you to narrow down your selection.
  - Project: Select the program element, using the 'Lookup' icon.
  - Stages: Select the Stage of the project, using the 'Lookup' icon (i.e. Application Entry).
  - 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 program element applications to which the user has been assigned.

Administrative Program Element

- To access the administrative and program element applications:
    - □ Only program elements assigned to the user will appear in the project listing.
    - □ Click the Project Title (hyperlink) to access the program element application.
    - □ Remember you need not complete your entire application in one session.

- **Title:** Displays the Name of the program element application.

- **Stage:** Displays the stage in the grant life cycle for the application.

- **Status:** Displays the process status that the application is in:
    - □ **Pending –** The application has not been started.
    - □ **Work In Progress –** The application is in process but has not yet been submitted.

- **Errors Validate:** To validate the applications for errors, check the box, in the Errors Validate column and click the validate button. Only the application checked will be checked for errors.

- **Submit:** Application cannot be submitted from this screen so the check box is disabled.

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

Click 'OK' to begin entering the application.
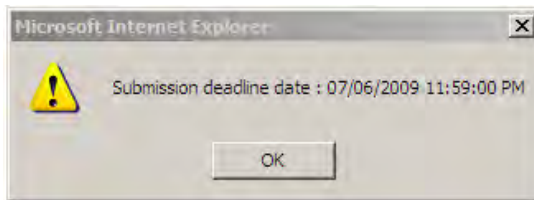
Completion of the Administrative Facesheet Tab

☐ Should be done first to pre-populate other applications.

☐ Click the program name (hyperlink) under the Title column to access the administrative tab.

☐ The information entered in the administrative facesheet tab will pre-populate each program element's application Facesheet Tab.

■ The Administrative Comprehensive Facesheet Tab is for identifying agency specific information such as Agency's fiscal year and agency's contacts (i.e. Project Director, Authorized Official & Financial Officer).

Administrative Facesheet tab

- Fiscal Agent Information - The system pre-populates most of this information. The information is pulled from the grantee agency profile.
    - □ Choose the Agency Fiscal Year beginning Month & enter in the Date.
    - □ Click 'Save' to save changes.

- If the information under the Fiscal Agent Information page is incorrect, contact the MDHHS
  System Administrator for assistance.
- You are required to save this information in the application. Click 'Save' or 'Save ->' to save this information.

Administrative Facesheet Tab

Certification/Contact Information

- Enter each of the required contacts for application in the administrative tab. The system requires the Grantee to identify, **one** Project Director (PD), **one** Financial Officer (FO), and **one** Authorized Official (AO).

Adding a contact who is an Active MI-Egrants User:

- Select Contact Type, using the 'Lookup' icon.
- Select EGrAMS Login using the 'Lookup' icon. Check the box next to the name of the contact.
  NOTE: If a User is <u>not</u> listed on the 'Lookup' menu, do **not** add them manually. Check to see if they have a Profile, if so contact the MI E-Grants System Administrator for assistance.
- The system will pre-populate the address, email, and designation/title.
- Click 'Save' to save changes. Upon saving, the system will bring up a blank Contact Information screen

NOTE: Do **NOT** select more than <u>one</u> PD, FO, or AO, as the system may select the "wrong person" to be listed on the Grant Agreement. Should your FO or AO change during the grant year, you would need to request the Facesheet on <u>each</u> project to be opened for Amendment.

Project Applications and Amendments

- The following instructions (pages 53–75) 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.

Project Application Entry

FACESHEET SECTION: **All** applications have facesheets.

■ All application Facesheets contain general contact information, project allocation amount and the agencies key contacts for the selected program element.

Select the Project Application hyperlink to complete the Grant Application.

1. Fiscal Agent Information

■ MI E-Grants pre-populates the fiscal agent information and the information from the administrative application facesheet.

■ If the information on the Fiscal Agent Information screen is incorrect, contact the MDHHS system administrator who will correct the system.

■ Click 'Save' to save the information on the screen or click Save-> to save the information and advance to the next screen.

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: In allocation-based program elements, the amount of Funds and Project Cost are pre-populated with the agency allocation amount.*

- If the information on the Program Information screen is incorrect, contact the MDHHS system administrator for assistance.

- Click the ⊙ ⊙ arrow buttons to move forward or backward in the application facesheet.

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 Grantee clicks on the button to view a list of errors requiring correction.

- Click the 'OK' button.

- Click the 'Circle 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 program elements may also be added.
- 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 arrows 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 the section tab reports no errors.
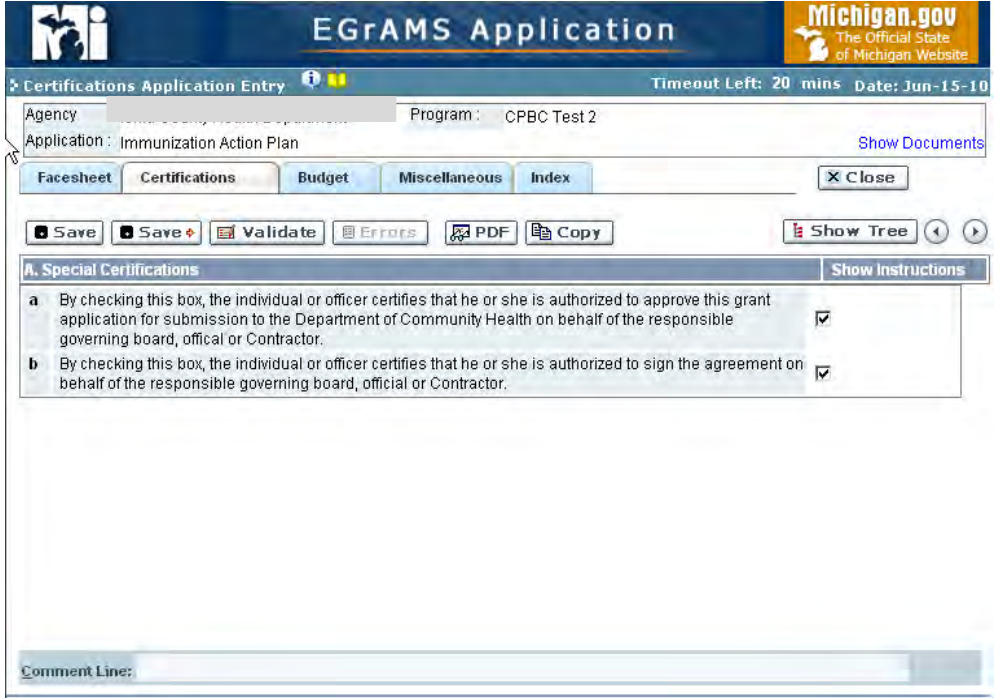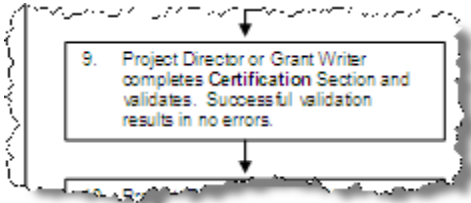
Understanding the Budget Tab

- **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.
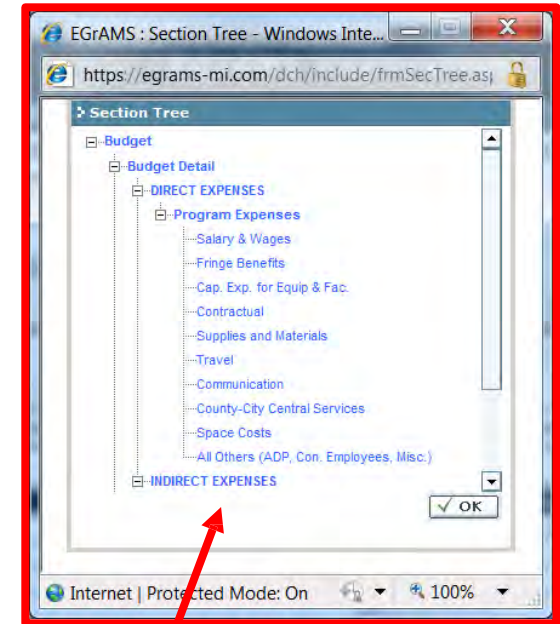
Quantity X Rate X Unit of Measure Budget Entries

■ 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 the appropriate unit of measure for the position description (i.e., FTE)

□ **Notes:** Enter information to clarify the position description or the calculation of the position salary and wages or fringe benefits

■ Click the 'Save' button to save changes or Save-> to save and advance.

Description: The Grantee selects Program Manager for the title.
Quantity (QTY) was expressed as a decimal (FTE) of .20. **Rate:** The Grantee entered the total salary cost for this position description.
UoM: The Grantee selected FTE (Full-time Employee).

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. If composite rate is used, the Grantee should identify the benefits included in the Notes icon.

□ **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-> to save and advance to the next screen.
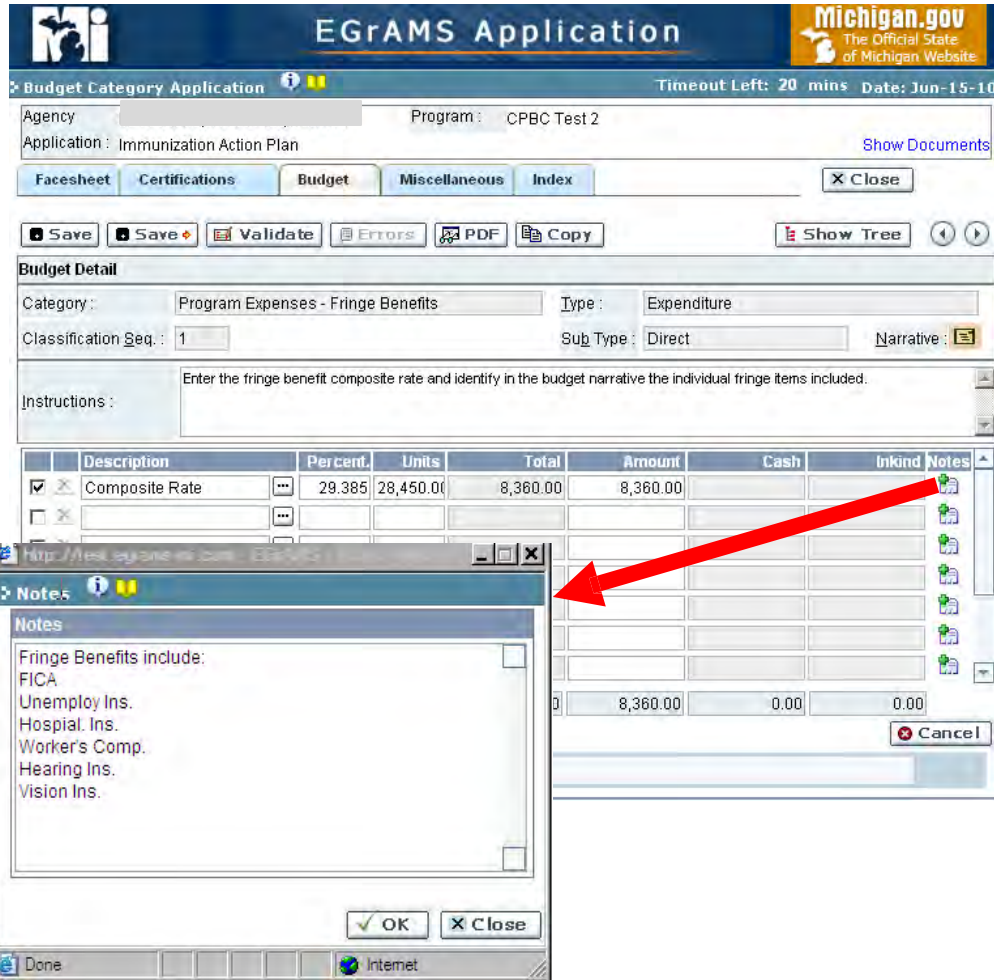
The applicant selects Composite Rate for the description.
Percentage (Percent) entered 29.385%. The system automatically calculates the total amount of Fringe Benefits.)

Line Item versus Category

■ For the budget categories of Travel, Supplies and Materials Communication Cost, County/City Central Services, Space Costs and Other Expenses **only**, if the budgeted amount is < 10% of the total agreement costs, the grantee may opt to enter only the subtotal amount for the category.

10. Project Director, Grant Writer or Financial Officer complete **Budget** Section and validates. Successful validation results in no errors.

   ■ To enter a Category budget:

      □ Select radio button the 'Category' .

      □ 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.

■ Grantee cannot enter multiple line items when budget screen is set to level – Category.

■ Click 'Save' to save your changes.

Budget Level

Changing an Expenditure from a Line Item to a Category Level

- **Important to Remember:** Changing the configuration from a line item level to a category level will delete all existing entries. To complete, the Grantee completes the following fields:

- Level – Select Category. The system will prompt the applicant to verify that this change is acceptable.

- Click the 'OK' button to move forward to a 'Category' Level Budget.

- Click 'Cancel' button to stay with the 'Line Item' Level Budget.

Line Item Budget Entries

- This budget configuration is used for most budget categories and allows the Grantee to specify the individual items associated with the categories. This type of reporting is required for Travel, Supplies and Materials and Other Expense categories when the total amount of the category equals 10% or more of the total budget. Failure to use this reporting when required 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-> to save and advance to the next screen.

The applicant selects a number of travel cost for the descriptions.
Amount: The applicant entered the total travel cost for their permanent or part-time employees.

Contractual (Subcontractors/Subrecipient)

■ When budgeting for subcontractors, the Grantee is required to complete the following fields:

    □ **Description**: Select the contractual service description, using the 'Lookup' icon. <u>Enter the name and/or description of the contractual expense below in the text box provided.</u> 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.

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

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

■ Click the Show Tree 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:** 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	41,737.00	41,737.00	0.00	0.00	
Fringe Benefits	21,641.00	21,641.00	0.00	0.00	
Cap. Exp. for Equip & Fac.					
Contractual					
Supplies and Materials	14,000.00	14,000.00	0.00	0.00	
Travel	250.00	250.00	0.00	0.00	
Communication	450.00	450.00	0.00	0.00	
County-City Central Services					
Space Costs	1,520.00	1,520.00	0.00	0.00	
All Others (ADP, Con. Employees, Misc.)	3,420.00	3,420.00	0.00	0.00	

Source of Funds (last step of the Budget Tab)

■ Click the Show Tree 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**
      ■ **1st and 2nd Party –** Enter the total fees and collections estimated. These are funds that are projected to be received from private payers or the general public (1st party); or from organizations, private or public, who might reimburse services for a group or under a special plan.

      ■ **3rd Party** - This included fees for services, payments by third parties (insurance, patient collections, Medicaid, etc.) and any other collections.

Source of Funds, continued

☐ **Federal/State Funding (Non-MDHHS) -** Enter the amount of projected funds to be received directly from the federal government or from any State Contractor other than MDHHS (i.e., DHS or MDOT, etc.).

☐ **Federal Cost Based Reimbursement (CBR) –** Enter the amount revenues earned from CBR. CBR funds are to be budgeted in the program element in which it was earned.

☐ **Federal Medicaid Outreach –** Enter the amount of projected funds from the federal government for allowable Medicaid Outreach Activities, per the specific instructions outlined in Attachment I – Instructions for the Annual Budget.

  ▪ Note: Amount Column correlates with State Amount.
  ▪ For CSHCS Funds, use the Show Documents link to find the applicable Medicaid Percentage.

☐ **Required Match – Local** – Enter the amount of match required for the program element. This includes local match for Medicaid Outreach matching funds, CSHCS Medicaid Outreach funds or other hard match.

Budget Category Application screen showing:

Del.	Description	Amount	Cash	Inkind	Total	Narr.
	TOTAL EXPENDITURES	103,932.00	0.00	0.00	103,932.00	
	Source of Funds					
X	Fees and Collections - 1st and 2nd Party	0.00	4,321.00	0.00	4,321.00	
X	Fees and Collections - 3rd Party	0.00	61,000.00	0.00	61,000.00	
X	Federal or State (Non MDCH)	0.00	0.00	0.00	0.00	
X	Federal Cost Based Reimbursement	0.00	7,000.00	0.00	7,000.00	
X	Federally Provided Vaccines	0.00	0.00	0.00	0.00	
X	Federal Medicaid Outreach	0.00	0.00	0.00	0.00	
X	Required Match - Local	0.00	700.00	0.00	700.00	
X	Local Non-ELPHS	0.00	0.00	0.00	0.00	
	Totals	26,911.00	77,021.00	0.00	103,932.00	

Source of Funds, continued

☐ **Local Non-ELPHS** – Enter the amount not designated as required and allowable for ELPHS; losses arising from uncollectible accounts; charitable donations; fines, penalties; capital expenditures; Federal Provided Vaccine Values; or other items as defined in the Attachment I – Annual Budget Instructions.

☐ **Other Non-ELPHS** – Enter the amount of projected funds from sources other than state, federal and local appropriations to the extent that they are not eligible for ELPHS.

☐ **MDHHS – Non-Comprehensive -** Enter the amount of projected funds to be received under a separate MDHHS agreement. For example, funding received under a separate Mental Health or Substance Abuse agreement.

☐ **MDHHS - Comprehensive –** Enter the amount funds projected to be received under the Comprehensive agreement for performance or categorical program elements (i.e., programs associated with an allocation).

Budget Category Application				Timeout Left: 19 mins	Date: Jun-15-10
Agency		Program :	CPBC Test 2		
Application :					Show Documents

| Facesheet | Certifications | **Budget** | Miscellaneous | Index | | X Close |

■ Save　■ Save +　■ Validate　■ Errors　■ PDF　■ Copy　　　　■ Show Tree ◄ ►

Source of Funds

TOTAL EXPENDITURES	58,125.00	0.00	0.00	58,125.00
Federal Medicaid Outreach	0.00	0.00	0.00	0.00
Required Match - Local	0.00	0.00	0.00	0.00
Local Non-ELPHS	0.00	0.00	0.00	0.00
Local Non-ELPHS	0.00	0.00	0.00	0.00
Local Non-ELPHS	0.00	0.00	0.00	0.00
Other Non-ELPHS	0.00	0.00	0.00	0.00
MDCH Non Comprehensive	0.00	0.00	0.00	0.00
MDCH Comprehensive	34,055.00	0.00	0.00	34,055.00
ELPHS – MDCH Hearing	0.00	0.00	0.00	0.00
ELPHS – MDCH Vision	0.00	0.00	0.00	0.00
Totals	34,055.00	24,070.00	0.00	58,125.00

Comment Line:

Source of Funds, continued

- ■ **ELPHS – Source of Funds**

    - □ ELPHS is a block grant funding source that is to be budgeted as follows:

        - ■ **ELPHS – Drinking Water** separate allocation and program element.

        - ■ **ELPHS – Onsite Sewage** separate allocation and program element.

        - ■ **ELPHS – Food** separate allocation and program element.

        - ■ **ELPHS – Hearing** separate allocation and program element.

        - ■ **ELPHS – Vision** separate allocation and program element.

        - ■ **ELPHS – MDHHS Other** separate allocation but can be budgeted into multiple program elements, i.e., General Communicable Disease, Hearing, HIV ELPHS, STD ELPHS, Immunizations ELPHS, Vision and Administration ELPHS.

    - □ Enter the budgeted amount applicable to the program element in the source of funds screen.

    - □ System assures ELPHS is a valid funding source for the program element and that ELPHS allocations are not over-budgeted across program elements.

    - □ System will fire error message if ELPHS is over-budgeted or not appropriate for program element.

Source of Funds				
TOTAL EXPENDITURES	58,125.00	0.00	0.00	58,125.00
ELPHS – MDCH Hearing	0.00	0.00	0.00	0.00
ELPHS – MDCH Vision	0.00	0.00	0.00	0.00
ELPHS – MDCH Other	0.00	0.00	0.00	0.00
ELPHS – Food	0.00	0.00	0.00	0.00
ELPHS – Drinking Water	0.00	0.00	0.00	0.00
ELPHS – On-Site Sewage	0.00	0.00	0.00	0.00
MCH Funding	0.00	0.00	0.00	0.00
Local Funds - Other	0.00	24,070.00	0.00	24,070.00
Inkind Match	0.00	0.00	0.00	0.00
MDCH Fixed Unit Rate				
Totals	34,055.00	24,070.00	0.00	58,125.00

Source of Funds, continued

- **Maternal Child Health Funding (MCH)** Enter the amount of funds to be budgeted as a funding source under any of the appropriate program element(s) (i.e., Children's Special Health Care Services (CSHCS), Child Health MCH, Family Planning MCH, Immunization MCH, Maternal Infant Health Program MCH, or a locally defined program which is defined in the LMCH Community Plan), as approved and allowed by Division of Family and Community Health.

- **Local Funds – Other** Enter all local support in the appropriate element, project or service group column. This may include local property tax and other local revenues (does not include fees.)
  - □ Enter amount in the cash column.

- **Other Local – In-kind** Enter all local soft match or in-kind support in the appropriate element in this field (i.e., soft match for WISEWOMAN, Bioterrorism and/or Teen Pregnancy Prevention).
  - □ Enter amount in the in-kind column.

Source of Funds

TOTAL EXPENDITURES	58,125.00	0.00	0.00	58,125.00
ELPHS – MDCH Hearing	0.00	0.00	0.00	0.00
ELPHS – MDCH Vision	0.00	0.00	0.00	0.00
ELPHS – MDCH Other	0.00	0.00	0.00	0.00
ELPHS – Food	0.00	0.00	0.00	0.00
ELPHS – Drinking Water	0.00	0.00	0.00	0.00
ELPHS – On-Site Sewage	0.00	0.00	0.00	0.00
MCH Funding	0.00	0.00	0.00	0.00
Local Funds - Other	0.00	24,070.00	0.00	24,070.00
Inkind Match	0.00	0.00	0.00	0.00
MDCH Fixed Unit Rate				
Totals	34,055.00	24,070.00	0.00	58,125.00

Source of Funds, continued

- **Fixed Fees –** Program elements which are billable on a fixed unit rate basis (i.e., AFIX, Nurse Education, CSHCS Case Mgt./Care Coordination, Informed Consent, SIDS, etc.) are to be budgeted as a separate program element.

  - □ **CSHCS Case Mgt. and Care Coordination.** Fixed Fees are to be treated as a single program element. Billing submissions will continue to use the Supplemental FSR which will be uploaded to the FSR at billing submission.

  - □ **Immunization – Fixed Fees.** Fixed Fees associated with immunization billings will be treated as a single program element. Billings submissions will utilize a supplemental FSR which will be uploaded to the FSR at billing submission.

  - □ SIDS, Informed Consent, HIV Prevention Services – non categorical, etc. are to be treated as a their own separate program elements.

- While program elements which are billable on a fixed unit rate basis are to be budgeted as a separate program element, these expenditures can be cost distributed from the program/cost center in which they are incurred.

  - □ **CSHCS Case Mgt. and Care Coordination** can be cost distributed from CSHCS Outreach and Advocacy.

  - □ **Immunization – Fixed Fees** can be cost distributed from Immunization Clinic, Immunization IAP and/or Vaccine Quality Assurance.

  - □ **SIDS** can be cost distributed from other appropriate cost centers.

  - □ **Informed Consent** can be cost distributed from Nursing Administration or Administration. Cost distribution from Family Planning is prohibited.

  - □ **HIV Prevention** can be cost distributed from Communicable Disease, STD Clinic or other appropriate cost centers.

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Comprehensive Budgeting Special Considerations

- **Administration Program Elements**
  - In order to capture any ELPHS funds associated with Administrative activities and/ or to verify that indirect costs are appropriately distributed, LHDs will need to complete a program element titled "Administration."

  - Program element will require cost detail schedule.

  - Expenditures will utilize the cost distribution to the remaining program elements and should reflect the costs of providing administration to these program elements and reported as Indirect Costs expenditures.

  - Other cost distributions associated with Nursing Services, Environmental Health and/or other health department administrations will be handled in a similar manner but reported as Other Cost Distribution for the applicable program elements.

Administration Program Element

TOTAL DIRECT EXPENSES	230,554.00	230,554.00	0.00	0.00
INDIRECT EXPENSES				
Indirect Costs				
Indirect Costs	-170,626.00	-170,626.00	0.00	0.00

Nursing Administration Program Element

TOTAL DIRECT EXPENSES	10,221.00	10,221.00	0.00	0.00
INDIRECT EXPENSES				
Indirect Costs				
Indirect Costs				
Other Costs Distributions	-10,221.00	-10,221.00	0.00	0.00
Total Indirect Costs	-10,221.00	-10,221.00	0.00	0.00
TOTAL INDIRECT EXPENSES	-10,221.00	-10,221.00	0.00	0.00

CSHCS Outreach and Advocacy Program Element

All Others (ADP, Con. Employees, Misc.)	35.00	35.00	0.00	0.00
Total Program Expenses	42,439.00	42,439.00	0.00	0.00
TOTAL DIRECT EXPENSES	42,439.00	42,439.00	0.00	0.00
INDIRECT EXPENSES				
Indirect Costs				
Indirect Costs	7,041.00	7,041.00	0.00	0.00
Other Costs Distributions	10,221.00	10,221.00	0.00	0.00
Total Indirect Costs	17,262.00	17,262.00	0.00	0.00
TOTAL INDIRECT EXPENSES	17,262.00	17,262.00	0.00	0.00
TOTAL EXPENDITURES	59,701.00	59,701.00	0.00	0.00

Cancel

Comprehensive Budgeting Special Considerations

- Updating the Facesheet.
  - Be sure to update the Facesheet section, screen 2 Program Information:
    - Update the 'Amount of Funds Requested' with the Total as it appears in the 'Amount' Column.
    - Update the 'Project Costs' with the Agreement Total as it appears in the 'Source of Funds' Screen.

- Note: There is no longer a net allowable line.
- If local funds exceed budgeted amounts, the LHD must adjust through the amendment process.

Using the Copy Function to Update the Budget

- Each tab in an application can be copied from a previous year's application in order to expedite data entry.

- Once the user has entered the application screen, the user clicks on the 'Copy' button.

- System generates a pop-up window.

- User selects the previous year's program from the 'Lookup' icon.

- User clicks 'OK' button to accept the copy request and window closes.

- 'Close' button closes window and cancels the copying request.

- System will generate a warning message. User clicks 'OK' button to continue.

- Fields update to the previous year's data.

- User updates data to reflect current year's information.
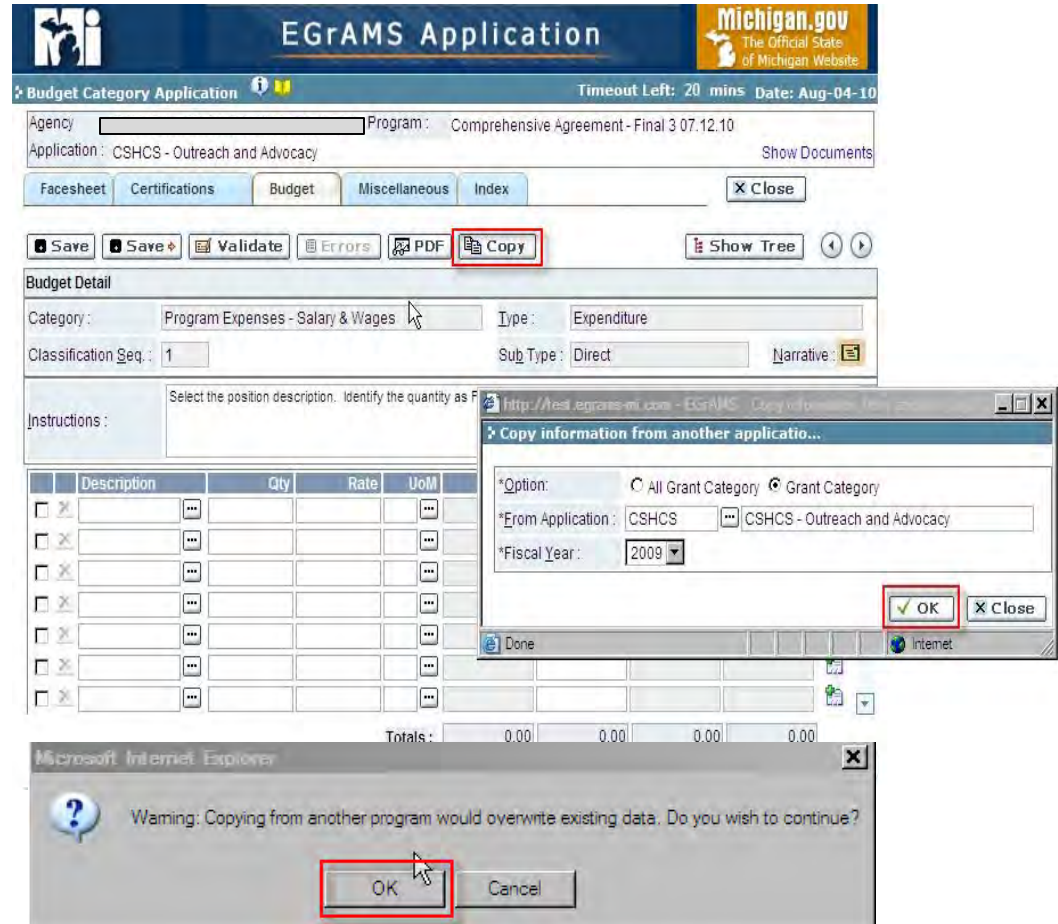
Miscellaneous Section

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

  □ **Attachment Title:** Enter the name of the document that is to be attached

  □ **File Name:** Attach file from your local system using 'Browse' button.

- Click 'Save' to save.
- Click the Validate button to check for errors.
- To view an uploaded /existing 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' or 'Save>' button.

11. Project Director or Grant Writer completes **Miscellaneous** Section and validates, if applicable. Successful validation results in no errors.

Attachment section screen

Click to Delete an attachment

Index Section

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

- Display an index of the entire application.

- Provides a summarized view of the entire application (errors, attachments, comments, etc).

- Provides a means to go to a specific page within a section (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)

Filter for Complete, Pending, Errors Only, Comments Only Sections
Click Find button to make your selection

Validate Program Element Application(s) for Errors

■ Navigate to: **Grantee -> Grant Application -> Enter Grant Application** and click the 'Go' button.

■ The system will display the 'Grant Application Entry' screen. Grantee. validates by following these steps:

□ Validate: Select the project applications by checking the box under the Validate column.

□ Click the 'Validate' button. The system will check the project application you selected.

□ The application shows no errors it's ready for review and submission by the Authorized Official.

□ If the application has errors, click the red circle 'Error' icon to view the errors.

□ To correct the errors, click on the project application name (hyperlink) to access the application and begin fixing the errors.

□ After making the corrections, re-validate the application.

□ Repeat these steps until the application is error free.

12. If errors are detected in application sections listed in steps 8-11, correct errors. Click Close to go back to Projects List.

Project Application Submission

- ☐ Authorized Official's Project Application Submission
- ☐ Print Project Application
- ☐ Viewing the Draft Agreement
  - ■ Viewing Individual Project Applications
  - ■ Viewing the DRAFT Consolidated Agreement

Agreement Acceptance

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

Submit the Program Element Application

- Navigate to: **Grantee -> Grant Application -> Grant Application Preview** and 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.

  □ Agency: System pre-populates.

  □ Additional search criteria, allows you to narrow down your selection.

    ■ **Project:** Select the program element using the 'Lookup' icon.

    ■ **Stages:** Select the Stage of the program, using the 'Lookup' icon.

    ■ **Status:** Select the status, after selecting the Stage, using the 'Lookup' icon.

  □ Click the 'Go' button. The system display the available project applications.

  □ Select the program element(s) to be submitted by check the box under the submit column. Program element can be submitted all at once or separately once they are completed and error free.

  □ Click the 'Submit' button.

  □ The system will prompt the user to confirm submission.

  □ MDHHS will appear in program approval queue for review & completion of program approvals/financial contract coding.
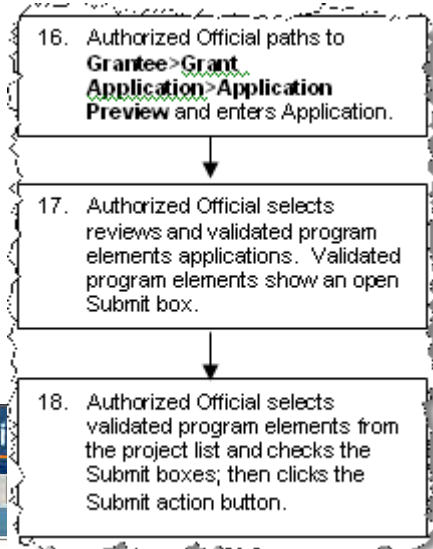
16. Authorized Official paths to Grantee>Grant Application>Application Preview and enters Application.

17. Authorized Official selects reviews and validated program elements applications. Validated program elements show an open Submit box.

18. Authorized Official selects validated program elements from the project list and checks the Submit boxes; then clicks the Submit action button.

Project	Title	Stage	Status	Errors	Validate	Submit
	CPBC Test 2					
	Administration	Application Entry	Work in Progress		☐	☐
	Assessment Feedback Incentive Exchange- Comprehensive	Application Entry	Pending		☐	☐
	Bioterrorism Emergency Preparedness	Application Entry	Work in Progress		☐	☑
	Child Health Activities-MCH	Application Entry	Pending		☐	☐
	CSHCS - Outreach and Advocacy	Application Entry	Pending		☐	☐
	CSHCS Care Coordination	Application Entry	Pending		☐	☐
	CSHCS - Medicaid Outreach	Application Entry	Pending		☐	☐
	Building Healthy Communities	Application Entry	Pending		☐	☐
	General Communicable Disease - LPHO	Application Entry	Pending		☐	☐
	Hearing - LPHO	Application Entry	Pending		☐	☐

Submit | Cancel

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Printing Individual Program Element Materials

■ To print and/or review the program element application.

  □ Click the project name (hyperlink) to access the program element application.

■ Navigate through the entire grant application by using the tree view (Table of Contents) or the arrow buttons.

■ Click on the Printer icon to get a PDF version you can save to your computer or print a copy of the program element application.

View the Consolidated Draft Agreement

- Navigate to: **Grantee->Project Director -> Application Status** and click the 'Go' button.

- Select the Grant Program name from the 'Lookup' icon and click the 'Find' button.

- Grantee selects the projects to include in the draft agreement by clicking on the box in the DRAFT column.

- To view draft agreement, Grantee clicks the 'View Contract' button.

- User verifies that all MCH and ELPHS funds have been budgeted by reviewing the program element specific and composite budget. Pages.

- Pop up window containing the draft agreement opens up. Grantee can save, email or print draft agreement using the applicable 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

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Electronically Signing the Agreement (final step)

- Once the Grant Agreement is been reviewed and approved by MDHHS, the Authorized Official will receive an email notification, informing him/her the Agreement is ready to be signed electronically.

- To Approve/Sign Agreement, select
    - Navigate to: **Grantee -> Project Director -> Application Status** and click the 'Go' button.
    - The system will display the 'Application Status' screen.

- ***Program:** Select a Grant Program, using the 'Lookup' icon.

- **Agency:** System pre-populates.

- Click the [🔍 Find] 'Find' button. The system displays the grant program status selected.

- Click the [20096600 ▼] [📖 View Contract] 'View Contract' button to view a PDF version of the full Agreement including the individual project agreements.

- Click the [📝 Contract Signed] 'Contract Signed' button to accept and execute the Agreement.

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

View / Print the Agreement

□ Navigate to: **Grantee -> Project Director -> Application Status** and click the 'Go' button.

□ The system will display the 'Application Status' screen.

■ *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 Comprehensive Agreement along with the individual project agreements.

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

■ Attachment Report

■ Financial Status Report (FSR-C)

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 and the User with the correct Permission Code is making the selection.

- ***Contact the Program Staff immediately if a report is submitted in error.***

Progress Report screen

Code	Grant Program								+Info
FSR	Financial Status Reporting	⋯	Expenditure	Monthly	03/31/2007	30	04/13/2007	⋯	Approved
FSR	Financial Status Reporting	⋯	Expenditure	Monthly	02/28/2007	30	03/14/2007	⋯	Approved
FSR	Financial Status Reporting	⋯	Expenditure	Monthly	01/31/2007	30	02/23/2007	⋯	Approved
FSR	Financial Status Reporting	⋯	Expenditure	Monthly	12/31/2006	30	02/06/2007	⋯	Approved
FSR	Financial Status Reporting	⋯	Expenditure	Monthly	11/30/2006	30	01/07/2007	⋯	Approved
FSR	Financial Status Reporting	⋯	Expenditure	Monthly	10/31/2006	30	01/07/2007	⋯	Approved
TRK_DB	Tracking Database 📎	⋯	Attachment	Quarterly	12/31/2006	30		⋯	WIP
WRK_PL	Work Plan	⋯	Narrative	Quarterly	09/30/2007	60		⋯	Pending
WRK_PL	Work Plan	⋯	Narrative	Quarterly	06/30/2007	30	07/23/2007	⋯	Approved
WRK_PL	Work Plan	⋯	Narrative	Quarterly	03/31/2007	30	04/18/2007	⋯	Approved
WRK_PL	Work Plan	⋯	Narrative	Quarterly	12/31/2006	30	01/10/2007	⋯	Approved
Year_End	Final Year End Report 📎	⋯	Attachment	Program End	06/30/2007	30	07/23/2007	⋯	Approved

User Name: rexpierce [R Pierce] , Agency: County of Jackson

Report color notations

- **Green**: Not due yet **or** 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: WIP (Work In Progress)/Pending, Submitted, Corrections, or Approved.
     NOTE: The next Report will **not** appear until the "Submitted" report has been reviewed and "Approved" by MDHHS Program Staff. Please contact your MDHHS Program Coordinator for assistance.

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

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.

⊞ Validate | ▤ View Errors | ⊠ PDF | ⊟ Save | ⊗ Cancel

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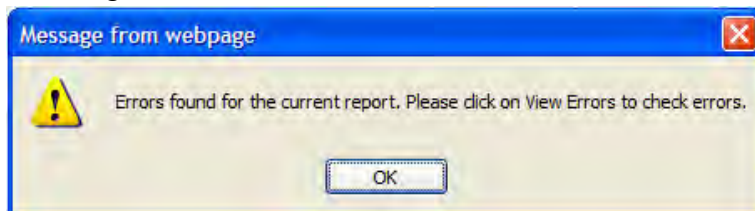
- Acknowledge message.
- The 'View Errors' button is enabled.
- Click on 'View Errors' action button.
- The system displays the error details in a pop-up window.
- Correct the errors in the Progress Report based on the 'Validation' errors report.
- Revalidate the report after correcting the errors. When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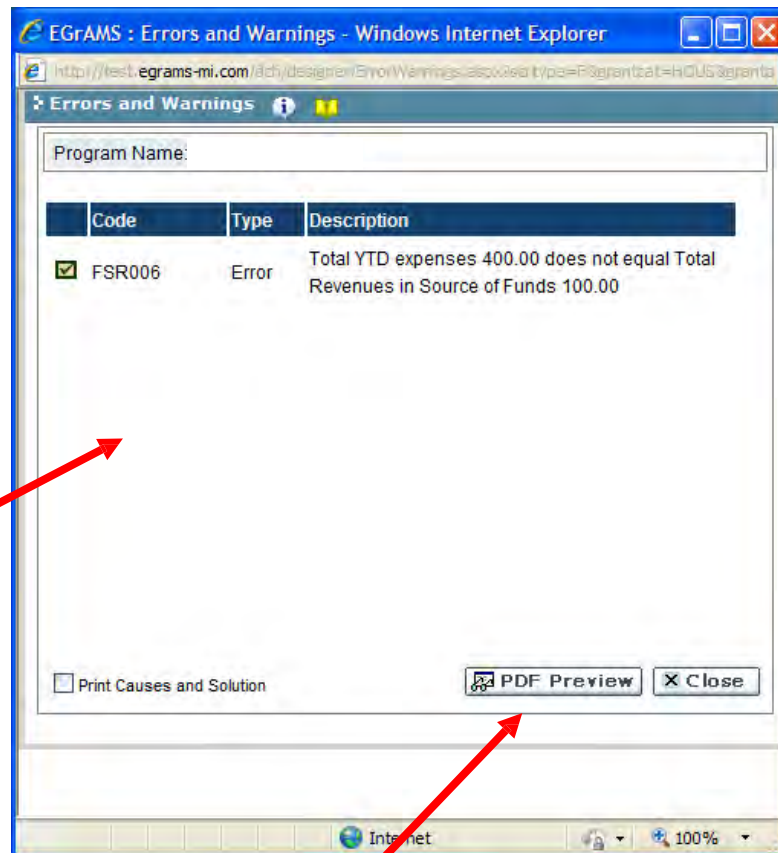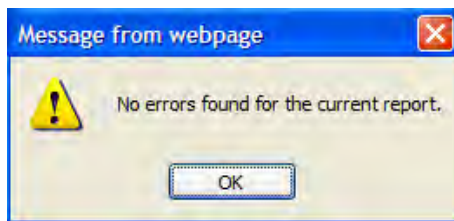
Click to open a .PDF Preview button for a Document of the errors report.

Submitting a Progress Report

- To submit the Report, click the 'Submit' checkbox and click the 'OK' button. The system will display this message:
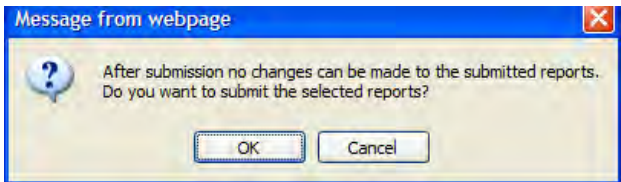
- Acknowledge the message by clicking 'OK' button. This action submits the report.

- 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 the Program Manager.

NOTE: The Financial Officer is the **only** 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.

Local / Maintenance of Effort Attachment Report

- Click the Report Title hyperlink, 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: ^ & ( ) - $ %.
- 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.
- Click the delete 'Red X' icon to delete the saved attached report.
- Click on 'Save' to save changes.
- Click the 'Close ' button to close the pop-up window.

Click to View an attachment

EGrAMS : Report Attachments - Windows Internet Explorer

https://egrams-mi.com/dch/Reports/RptAttachments.aspx?appid=9842&prjTitle=Substance Use Disorder S

Report Attachments

Period : 10/01/2013-09/30/2014 ▾ 2014 ▾ Status: Pending   Review Comments:

Type :   Regular Obligation Final

Program :   Documents

Agency :

Description :

Title	Attach	Show	Delete
	Browse...		✕

Validate   View Errors   Save   X Close

Internet | Protected Mode: On   100%

Attachment section screen

Click to Delete an attachment

Financial Status Report - Cumulative Overview

■ The Financial Status Report - Cumulative (FSR-C) provides a standardized format for reporting expenditures/source of funds related to the program.

■ Note: Only one FSR-C is submitted for each 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-C).

FSR-C Worksheet Tabs: The FSR-C contains two tabs, Expenditures and Source of Funds. Each tab contains a worksheet that the grantee must complete in order to submit the 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 that estimates the amount of remaining expenditures that are billed in the grant year and is used to develop the Department's year-end accounts payables and receivables for this agreement.

☐ **Final** – The last financial report of expenditures for a grant.

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 YTD Column** – refers to "Year To Date" and reflects all expenditures by budget category for the agreement to date.

- **Prior YTD Column** – reflects the expenditures total prior reported year-to date.

- **Current Expense Column** – reflects the expenditures by budget category for the current period.

- **Budget Column** – reflects the current budget of the most recent executed agreement or amended agreement.

Expenditures Tab

- **Balance Column** – Automatically calculates the remaining balance of the agreement by budget category.

- **Expend% Column**- refers to the percentage used within each budget category.

- **File Column-** click the 'Paper Clip' icon to view the attached documentation /supplemental FSR-Cs if required by Program.

- **Del Column** – Click the 'Red X' icon to mark the row values for deletion. This will reset all values entered in the row to zero. Click the 'Save' button to execute the reset.

- **Total Expenditures** – Calculates and reports the total expenditures for all columns and provides the user with the percentage of the total amount of the agreement that has been expended to date.

- Click the 'Save' button to save changes.

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

Source of Funds

■ 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 source of funds categories, as found on the program budget summary schedule of the agreement.

■ **Funds Column** – reflects the state funding by as reported for the year-to-date.

■ **Cash Column** – reflects the agency / local support by funding sources as reported for the year-to-date.

■ **Inkind Column** - reflects the agency inkind support by funding sources as reported for the year-to-date.

■ **Current YTD Column** – refers to Year To Date" and reflects all funding by budget category for the agreement to date.

Local funding sources can be billed over budget on the FSR-C, however an explanation must be provided to the program. Click the ***Explanation*** icon to provide the reason and attach it to the FSR-C.

Source of Funds Columns

- **Income Column** – reflects the total support by funding source for the current period for the agreement .

- **Prior YTD Column** – refers to prior reported "Year To Date" and reflects the support by major funding sources for the agreement to date.

- **Budget Column**– reflects the current budget of the most recent executed agreement or amendment agreement.

- **Balance Column** – Automatically calculates the remaining balance of the agreement by funding source.

- **Expend%** Column- refers to the percentage of support used by funding source.

- **File Column** - Click the 'Paper Clip' icon to view the attached documentation /supplemental FSR-Cs as required by Program**.**

- **Del Column** – Click the 'Red X' icon' to mark the row values for deletion. This will reset all values entered in the row to zero.

- Click the 'Save' button to execute the reset.

- **Total** - Calculates and reports the total amounts for all columns and provides the user with the percentage of the total funding for the project to date.

- Click the 'Save' button to save changes.
- Click the 'Validate' button to check for errors.

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FSR Attachment 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 not 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 83) .

- Once reviewed and approved by MDHHS Staff the payment is then authorized and processed.

Special Year-End Financial Status Reports

- **Obligation Report** – This report should be an estimate of remaining expenditure for the final agreement quarter.

- **4ᵗʰ Quarter 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 83).

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

Questions ?

Technical Support Contacts:

- **Brenda Roys**
  Phone: (517) 373-1207
  email : RoysB@michigan.gov

- **Necole Staron**
  Phone: (517) 241-2493
  Email: StaronN@michigan.gov

- **Laura Geist**
  Phone: (517) 241-3932
  Email: GeistL1@michigan.gov