GOVERNOR'S OFFICE OF
CRIME CONTROL & PREVENTION

Governor's Office of
Crime Control & Prevention

Grant Management System

Complete User Manual

Version 5.1

Last Update Date: 5/18/2017

Table of Contents

Document Version Control

Version	Description	Date	Primary Authors
1.6	Initial Draft	4/23/2012	R. Thun, K. Heilveil
1.7	Reformat/Creation of style sheet & tagged content, Updates to latest screens & new Grant Application procedure	6/13/2012	R. Thun, K. Heilveil, D. Sowers
1.75	Updates to revised screens & procedures (Grant Management, Funding Management)	6/24/2012	R. Thun, K. Heilveil, D. Sowers
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5.0	Updated manual for Team Pulse Feedbacks 17671 and 17672	5/6/2017	D. Sowers
5.1	Revisions to Feedback 17671 – complete	5/18/2017	D. Sowers

1 Introduction

The web-based GOCCP Grant Management System (GMS) provides a single portal through which all of the tasks associated with applying, awarding, and managing of GOCCP grants are performed. Actual access to certain sections of the GMS are based on permissions assigned to each user.

Internal GOCCP staff use the system to:

- Manage all funding programs and grant funding distribution information
- Make funding available for applicants
- View, administer, and manage all grant applications and grant awards
- Manage the contacts and organizations databases
- Administer user access to the system
- Create and process reports

External organizations (sub-recipients) use the system to:

- Input and manage information pertaining to their organization
- View/search for available funding
- Apply for grants
- View the status of grant applications
- Manage / maintain compliance information for awarded grants

1.1 Record Locking

GMS is a multi-user system – many internal and external users may be logged on and working in the system simultaneously. For this reason, GMS uses record-locking to avoid two users editing the same application, award, funding program or other system features at the same time.

- If you attempt to edit a record in GMS and you receive an error message indicating the record is locked, check with other users in your organization to be sure no one else is editing the same record.
- If this does not solve the problem, please email us by clicking the red question mark icon shown in the top right corner of every screen and clicking the **contact support** link.

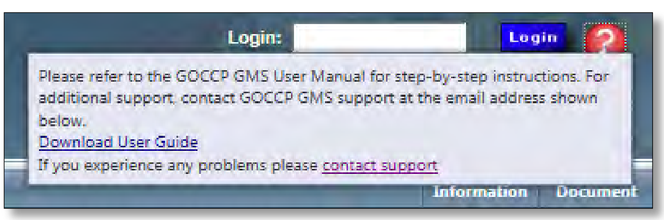


Figure 1 - Contact Support

2 Purpose

This manual describes all GMS processes and procedures, including the grant application process, and is available only to internal users. Information from this manual that is applicable to external users is provided in a separate manual.

Internal users are members of the GOCCP grant management team and are responsible for the following tasks:

- Identifying and maintaining the GOCCP Organizations and Contacts databases
- Enabling external users and administering rules (user roles and actions)
- Identifying and maintaining the GOCCP Funding Programs, Related Funding Year, GFDs and relative NOFAs
- Defining and managing the Grant Application Process
- Defining and managing the Grant Award Process, including Award notification
- Defining and Managing the Grant Management System Process

3 Getting Started – the GOCCP Grant Management Home Page

The GOCCP Grant Management home page is accessible to the public and provides a summary of the active NOFAs (Notice of Funding Availability) along with an area for authorized users to log into the secure GMS.

- It is a non-secure web page and as such only provides a list of available NOFAs and the parameters associated with each.
- You can view detailed NOFA information upon successful login with a valid Login and Password.

Figure 2 - Public View of GOCCP GMS Website

- Available GOCCP NOFAs are listed on the page with its Eligible community and the Grant Application Deadline date. Each NOFA also contains two additional sources of information for the user:
  - NOFA Detail Summary is accessible from the Information column by clicking the magnifying glass icon. This view provides initial parameters on the available funds such

as Start Date, End Date, Online Application Deadline, Hardcopy Application Deadline, Funding Year, Eligibility Description and Deadline Description.
    - If additional documentation for a NOFA is available, a document download icon appears in the Document column of the NOFA record.
- If there are more NOFA records than can be displayed on one page, a page navigation tool is provided at the bottom of the Home Page to help you navigate through the entire list of NOFAs.

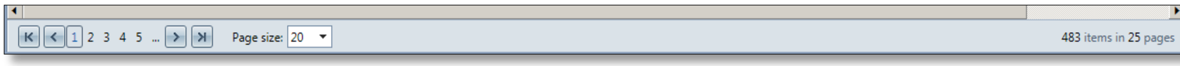


Figure 3 - Page Navigation Tool

Please refer to the section ***Navigating GMS*** for a more detailed description of navigation features in GMS.

3.1 Register as a GMS User

3.1.1 Create a GMS Login

Create a Login that will uniquely identify you in GMS.

- Choose a user name you will easily remember, for example your first initial + last name
- Use only alphanumeric characters (a-Z, A-Z, 0-9) – special characters (#, !, ?, etc.) are not accepted

3.1.2 Create a Password

Your password must be at least **8** characters in length with at least **1** special character (non-alphanumeric characters such as &, $, #, %, etc.). If the password you enter does not meet these requirements, you will see the following error message:

Password: Minimum characters required: 8 non-alphanumeric characters required: 1

Note: Passwords are case-sensitive.

3.2 Log Into GMS

Enter your Login (GOCCP-assigned User ID) and Password in the top right hand corner of the GOCCP Home page and click on the Login button to access GMS.

Figure 4 - GMS Login

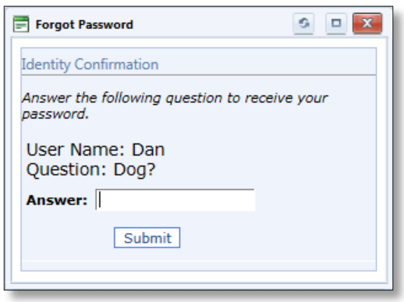
3.2.1 I Forgot My GMS Password

Your GMS user account will be locked if you attempt to log in with an incorrect password ***five*** times in any ***ten*** minute period.

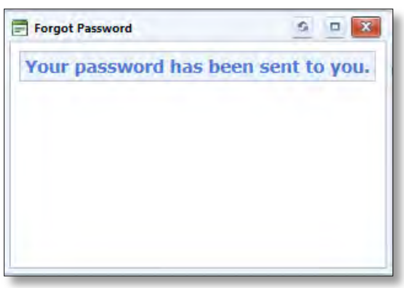
If you forget your password and have not made enough attempts to cause your account to be locked, you can request a password reset:

1. Click on the Forgot Password? link shown in Figure 4.
2. Enter your User Name (this is the User ID you log into GMS with, not the email address associated with your User ID) then click the Submit button.

3. The Identify Confirmation dialog box is displayed next. Type the answer to the security question you chose when setting up your GMS account, then click the Submit button.



4. You will then receive a confirmation message that your request has been received.

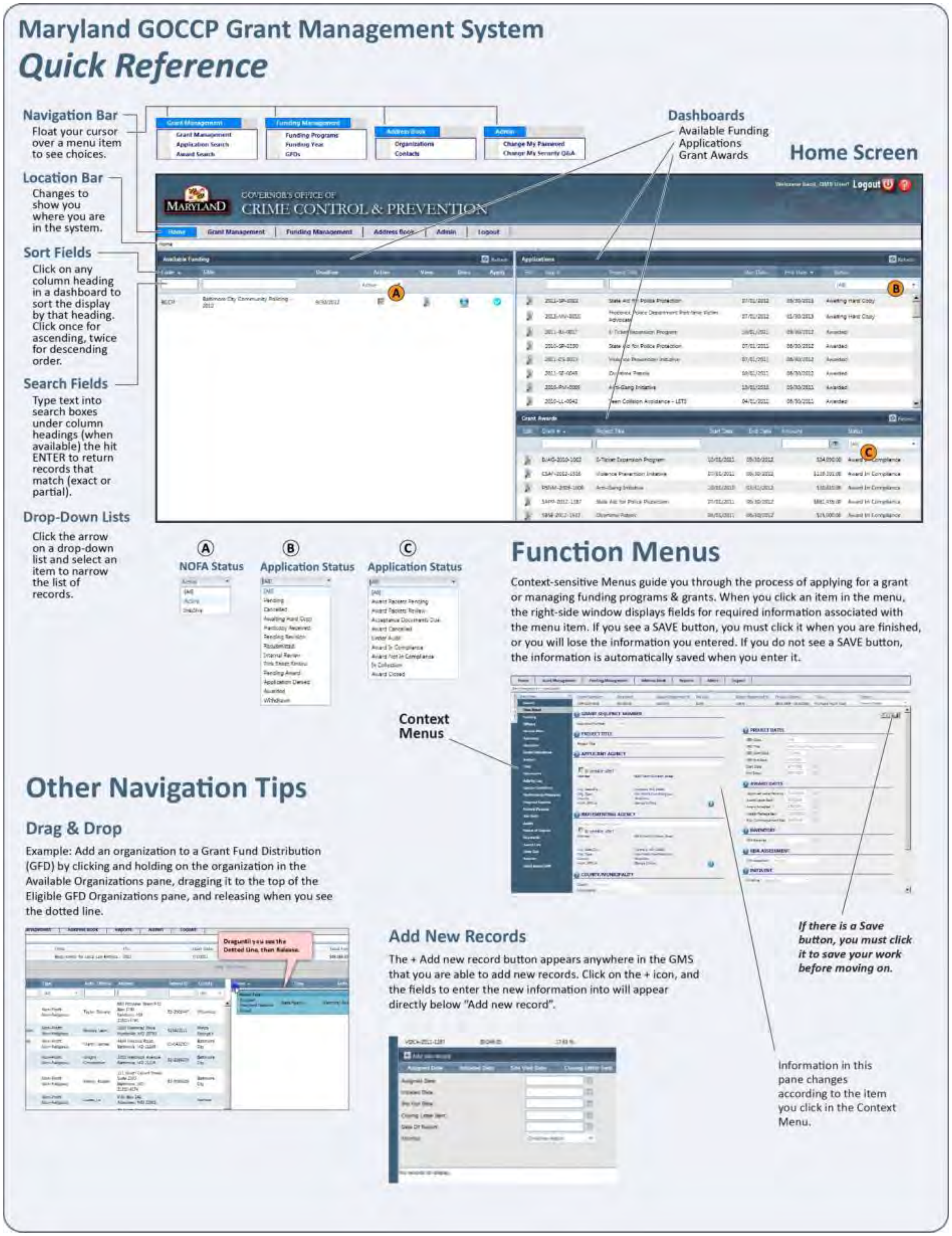


5. A new password will be sent to the email address registered with your User ID.
6. Return to the GMS Login screen and log in with your User ID and the new password that was emailed to you.

Note: If you've made ***five*** attempts within a ***ten*** minute period and your account has been locked, contact GOCCP Admin Support Staff. With proper verification, they will unlock your account and reset your password.

4 Quick Reference

The following quick reference sheet provides a high-level overview of commonly used GMS features:



5 Navigating GMS

5.1 GMS and Your Computer

GMS is a web-based application designed to run entirely from within your web browser. The GMS user community is comprised of many different individuals and organizations using various types of computers, operating systems, monitors, screen resolutions, and web browser settings.

Based on your computing environment, the appearance of some GMS screens can vary from what is shown in this manual. The functionality does not change, but some screens can vary in appearance. For example, on one computer the Grant Award Face Sheet will display data entry fields *beside* their labels, as shown in Figure 5:

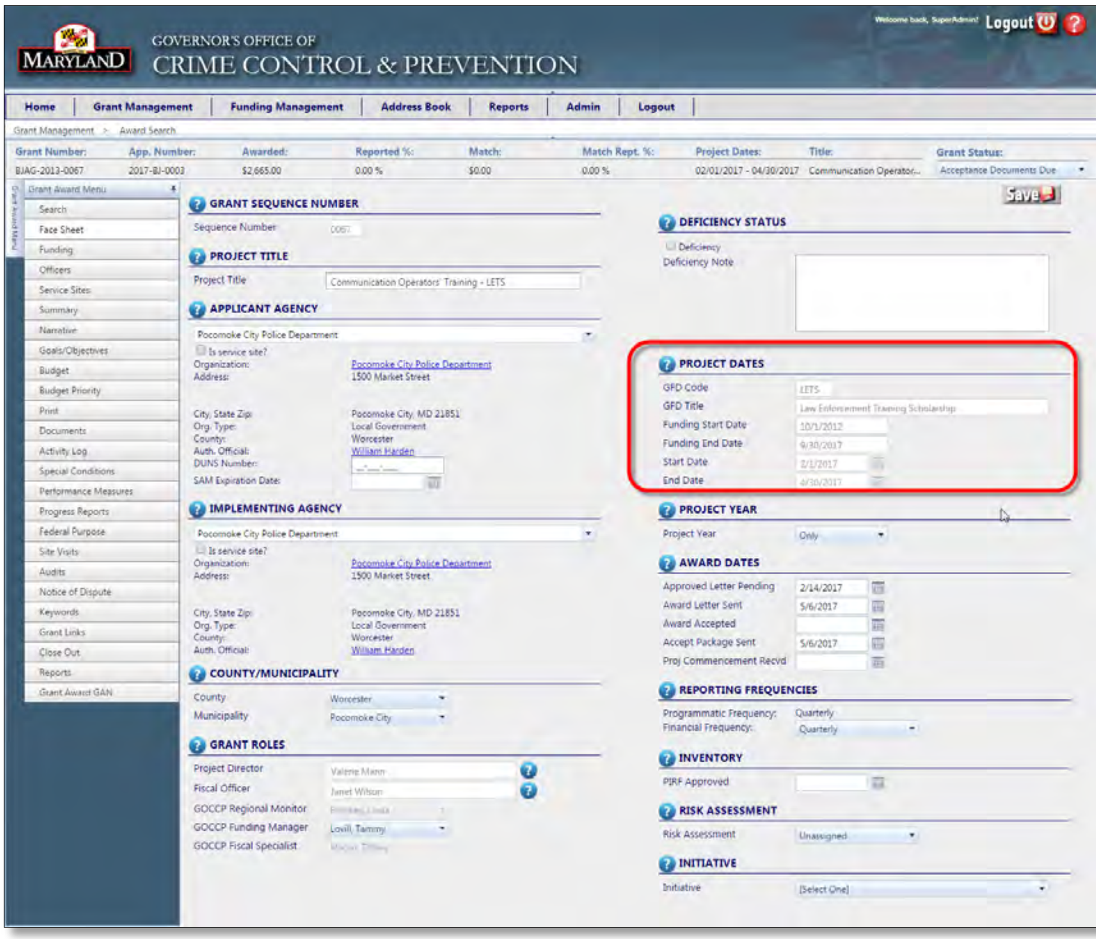


Figure 5 - GMS Screen: Data Fields Appear Beside Labels

While on another computer – one that uses a different screen resolution or different web browser settings – the data entry fields are displayed *below* their labels, as shown in Figure 6:

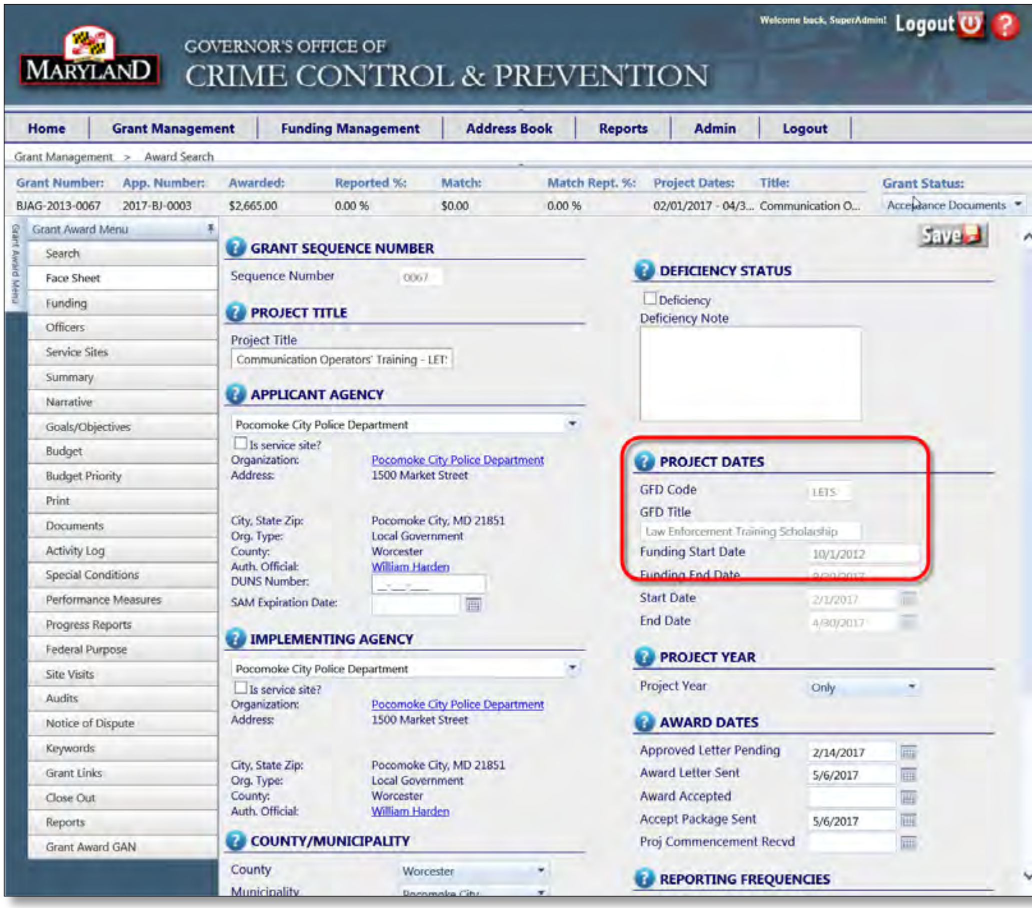


Figure 6 - GMS Screen: Data Fields Appear Below Labels

The functionality has not changed – only the location of the data entry fields have.

When differences in displays or resolution cause fields to be pushed down the page, a vertical scroll bar will appear; simply scroll down the page to see the additional fields.

5.2 The GMS Home Page

The secure GMS Home Page is displayed upon successful login:

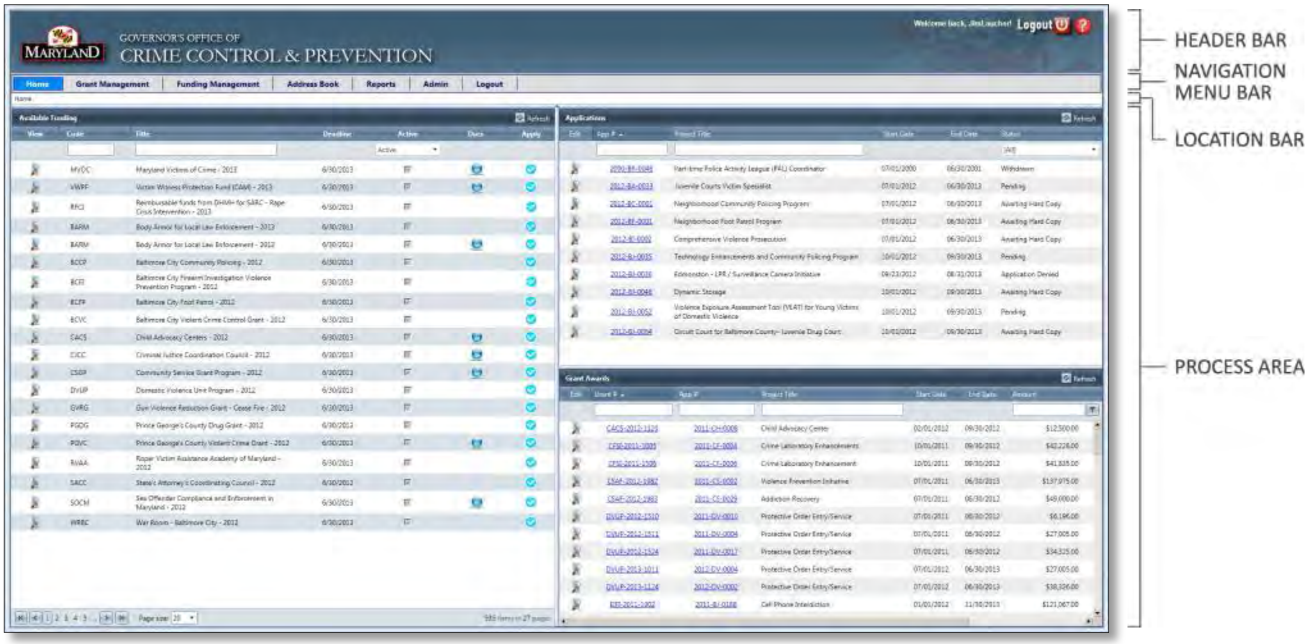


Figure 7 - GMS Home Page

The GMS interface consists of the *Header Bar*, *Navigation Menu Bar*, and *Location Bar* which are fixed in place and appear at the top of every screen throughout GMS. The *Process Area* changes based on the task you are currently performing.

5.2.1 Header Bar

The Header Bar displays the GOCCP logo and appears at the top of every screen in GMS. It contains links for logging in & out of GMS, accessing a PDF version of this manual, and contacting customer support.

Figure 8 - GMS Header Bar

- Click the Logout button at any time to leave GMS, which will log you out regardless of where you are in the system. Be sure to SAVE your work BEFORE clicking the button.
- Click on the Help button (question mark in the red bubble) if you need help with a procedure or wish to contact technical support at any time while using GMS.

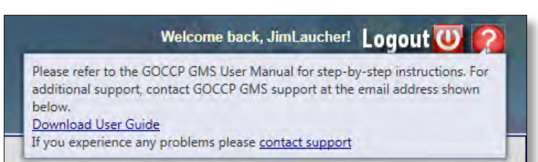


Figure 9 - GMS Help Button

- Within the Help button pop up box, click the *Download User Guide* link to download a PDF version of the GMS User Manual, or
- Click the *Contact Support* link to send an email to support. Doing this will create a new message addressed to *GMSsupport@goccp.state.md.us* using your default email program. NOTE: If your default email program does not open when you click on the Contact Support link, you can copy this email address, create a new email as you normally would, and paste this email address into the TO: line.

Note: You can hide the Header Bar at any time by clicking on the center-arrow on the bottom border of the Header:

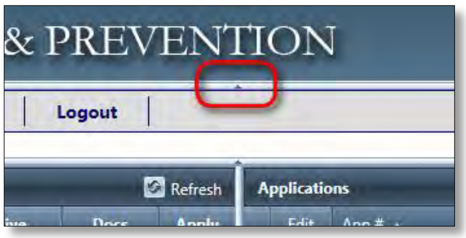


Figure 10 – Header Bar Center-Arrow

Click the center-arrow once to hide the Header Bar:

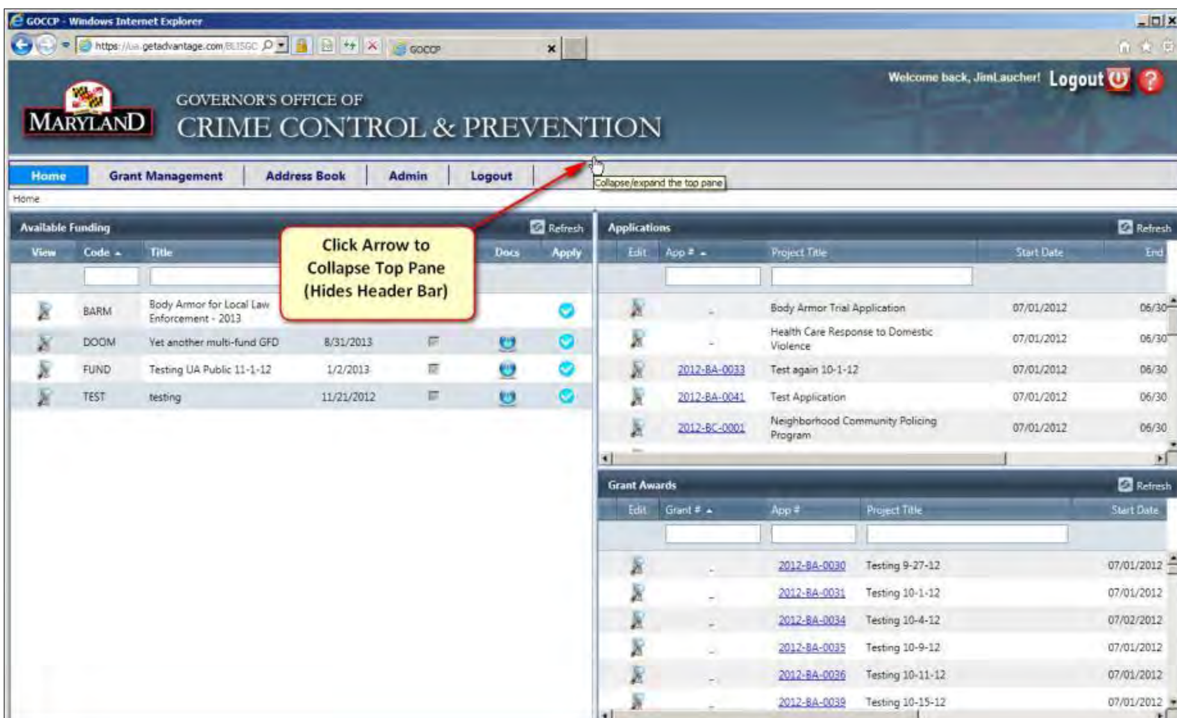


Figure 11 – Click Center-Arrow to Hide Header Bar

Click the center-arrow again to show the Header Bar:

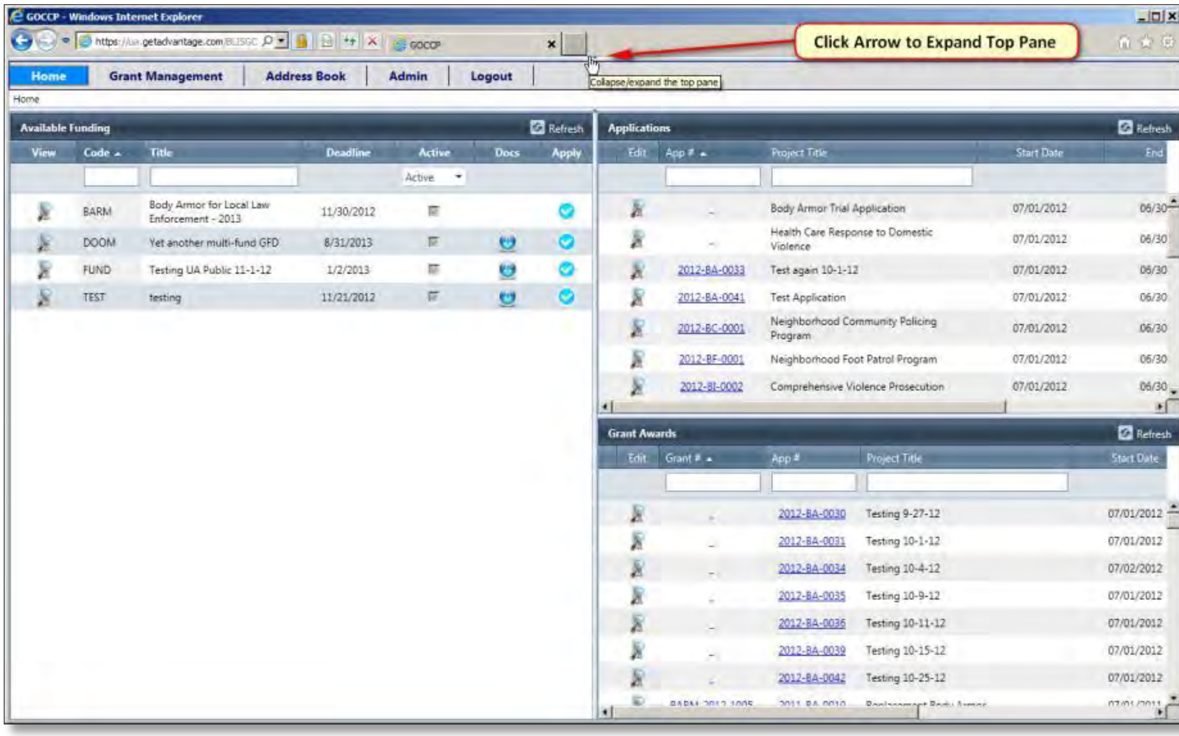


Figure 12 – Header Bar Hidden

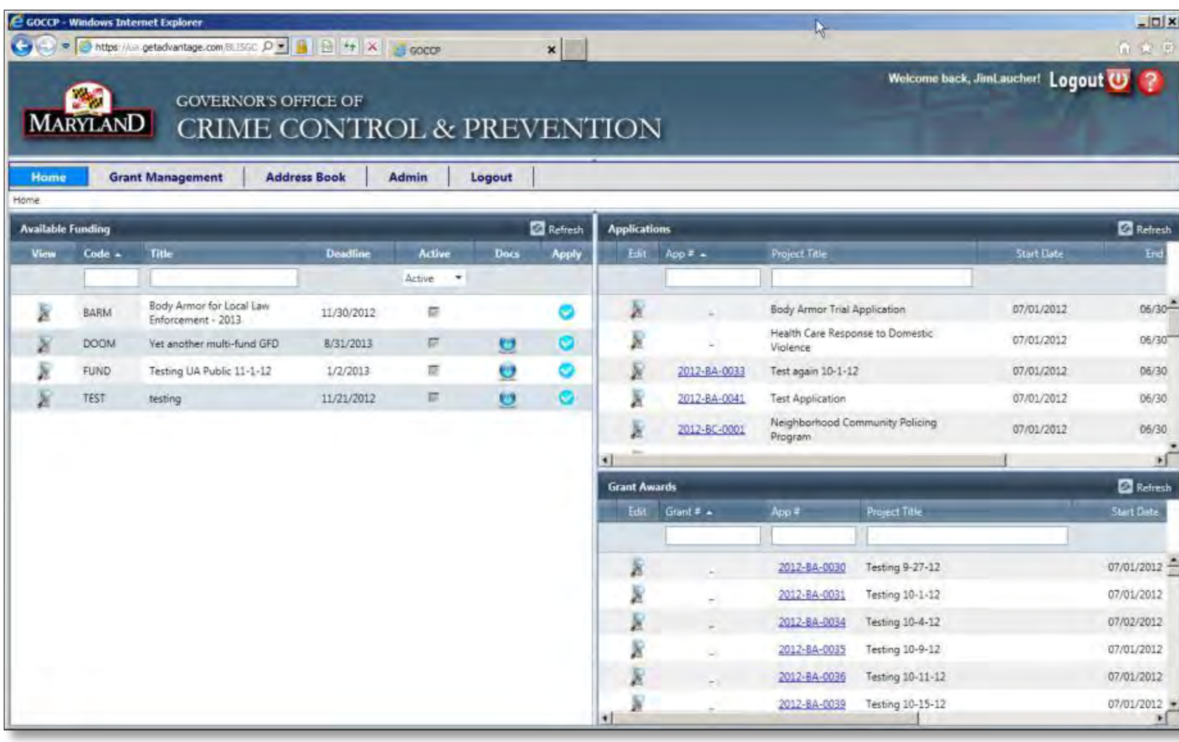


Figure 13 – Header Bar Shown

5.2.2 Navigation Menu Bar

The Navigation Menu Bar displays links to the different functional areas of GMS as menu and sub-menu items, and appears below the Header Bar on every screen in the GMS.

Figure 14 - GMS Navigation Menu Bar

Move your pointer over a menu item to highlight it. If a menu item has a sub-menu, it will automatically appear. When the menu or sub-menu item you wish to choose is highlighted, click the left mouse button.

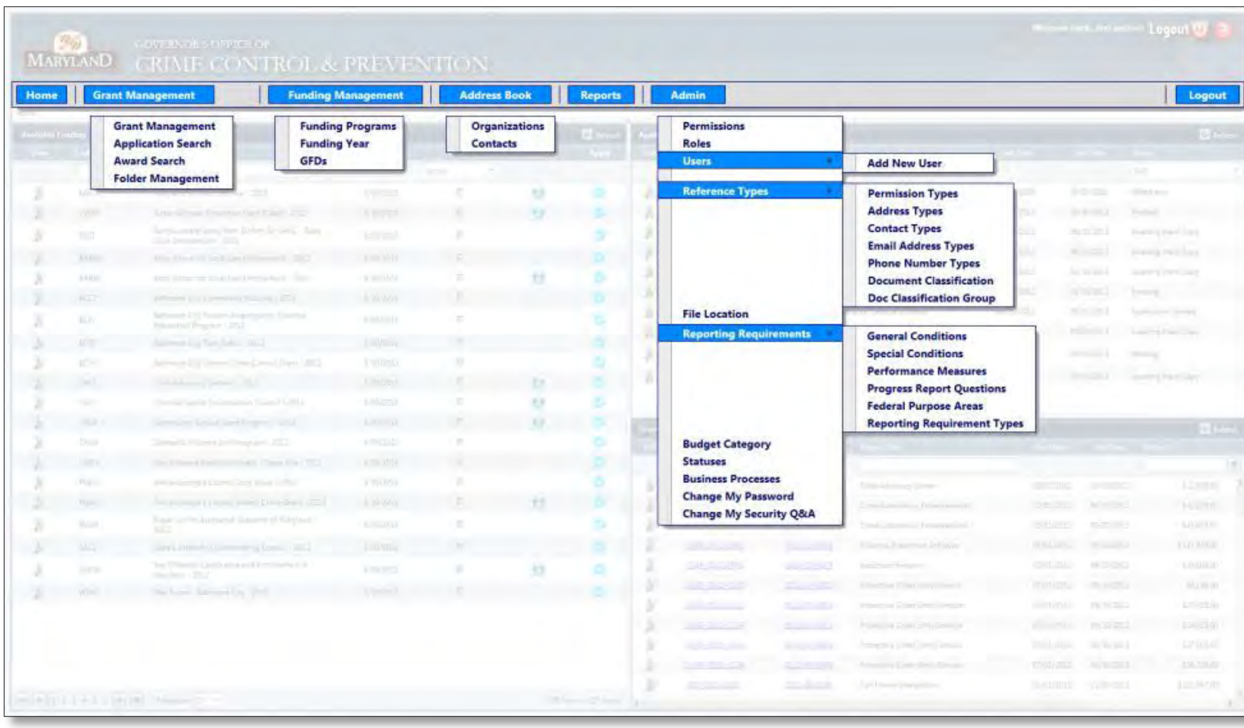


Figure 15 - Navigation Menu and Sub-Menu Items (Not all items are available to all users.)

NOTE: The menu and sub-menu items available to you depend upon the permissions assigned to your User ID. For example, a GOCCP Funding Manager will see the Funding Management menu & sub-menu, while an organization external to the GOCCP who is applying for a grant will not, and the Admin menu & sub-menu items will only be available to GOCCP and system administrators.

- Clicking *Home* on the Navigation Menu Bar will return you to your GMS Home Page from wherever you are in the system.
- Clicking *Logout* on the Navigation Menu Bar will log you out of GMS and return you to the GOCCP Home Page.

5.2.3 Location Bar

The Location Bar is a road map that shows you where you are within GMS. Like the Header Bar and Navigation Menu Bar, the Location Bar is fixed in place and appears on every GMS screen.

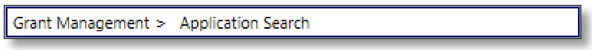


Figure 16 - GMS Location Bar

- For example, if you select *Application Search* from the *Grant Management* menu, you are taken to the GMS Application Search screen and the location bar will be updated to indicate your new location within the system, as shown in Figure 16.

5.2.4 Process Area

The Process Area is located beneath the Location Bar and is the primary working area within GMS. Its appearance changes based on where you are in the system – every task that you perform in GMS has one or more screens associated with it, and those screens are displayed in the Process Area.

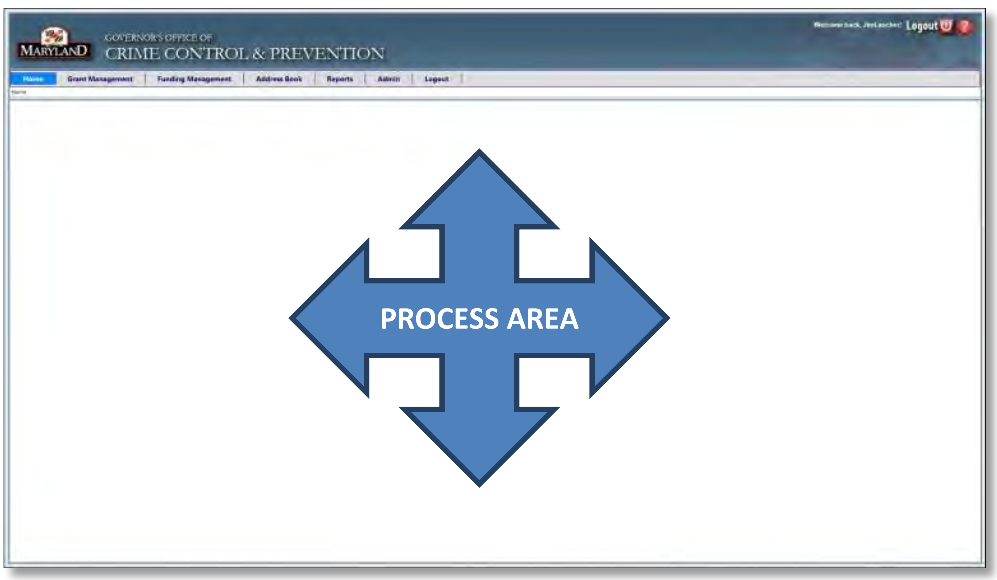


Figure 17 - GMS Process Area

5.2.4.1 *Dashboards*

The Process Area of your GMS Home Page is divided into three sections called Dashboards:

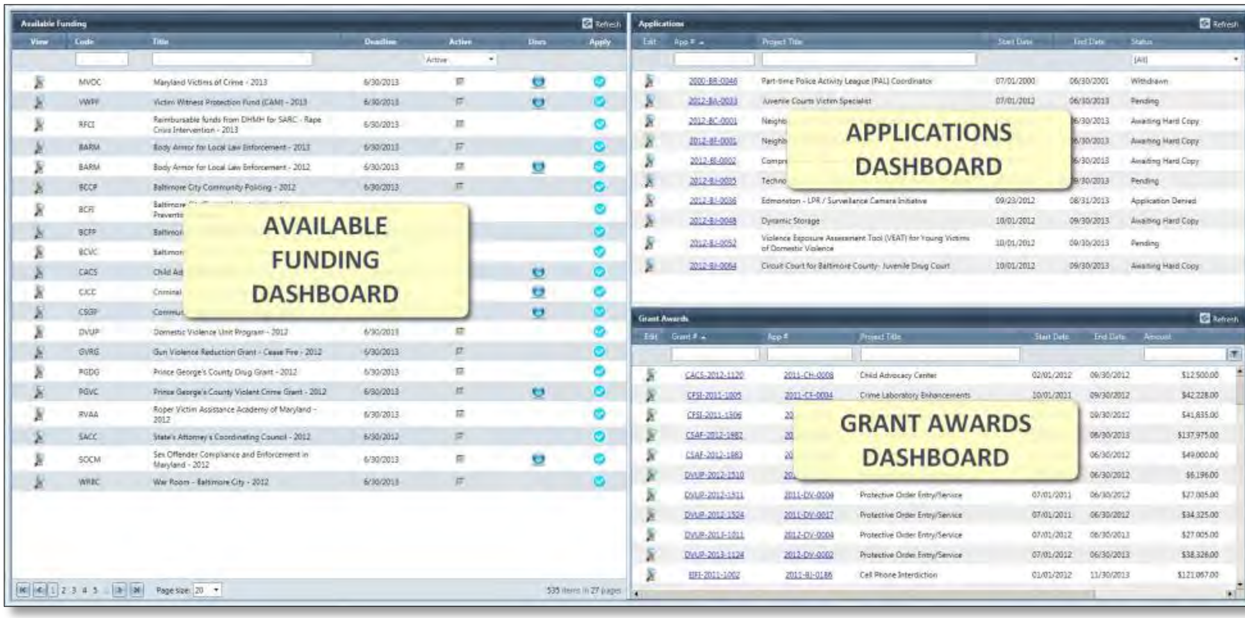


Figure 18 - GMS Home Page Dashboards

- The Available Funding Dashboard displays a list of current funding opportunities. The Applications Dashboard contains a list of grant applications your organization has created.
- The Grant Awards Dashboard displays a list of grants your organization has been awarded.

Each dashboard presents information in a format similar to a table or a spreadsheet – in *rows* and *columns*, and is made up of the following components shown in Figure 19:

Figure 19 - GMS Home Page Dashboard Components

- **Dashboard Header**: Identifies the dashboard
- **Column Headings**: The columns determine which fields of a record are displayed. For example, a complete grant application record may contain over 20 fields of information, but in the Applications dashboard only the high-level information is shown (the Application Number, Project Title, Start Date, End Date, and Status fields). NOTE: You can sort the records in your dashboard by the column headings – refer to the section ***Sorting Records in GMS*** for instructions.
- **Search/Filter Fields**: Using these fields, you can search for specific records or narrow the list of records shown by creating a filter. Refer to the section ***Filtering and Searching for Records in GMS*** for instructions on searching and filtering records.

- **Records**: Individual funding opportunities, grant applications, or grant awards, depending on which dashboard you are viewing. Each record is displayed in it's own row.
- **Action Columns**: Each dashboard may have one or more columns which display an icon in each record. In these columns, the fields do not contain information about a record, but rather allow you to perform an action on the record. For example, in the Application dashboard shown in Figure 19, the first column is the Edit action column; clicking the icon in that column in a specific row will allow you to edit that application.
- **Scroll Bars**: If a dashboard has more columns than will fit in the current frame, a horizontal scroll bar will appear. By moving your pointer over the scroll bar then clicking and holding the left mouse button down, you can drag the scroll bar to the right in order to view any columns that don't fit within the frame. The same is true for records – if the dashboard contains more rows than will fit in the frame, a vertical scroll bar will appear which will allow you to scroll up and down through the records.

Figure 20 - GMS Home Page Dashboard Scroll Bars

- **Resizable Frames**: Each dashboard is surrounded by a thin frame. You can change the number of columns or rows displayed in a dashboard by moving your pointer over the frame until it changes to the double-sided arrow, clicking and holding the left mouse button, dragging the frame to either side or up/down, then releasing the mouse button.

  NOTE: You can re-size the width of any column by placing your pointer between columns in the Headings Section:

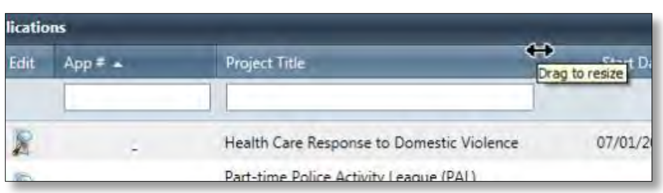


Figure 21 - Resize Dashboard Column Headings

- **Page Navigation Tool**: The Available Funding dashboard displays a tool at the bottom of the frame which allows you to change the number of records shown per page and easily navigate to any page. Figure 22 shows the action each button performs:

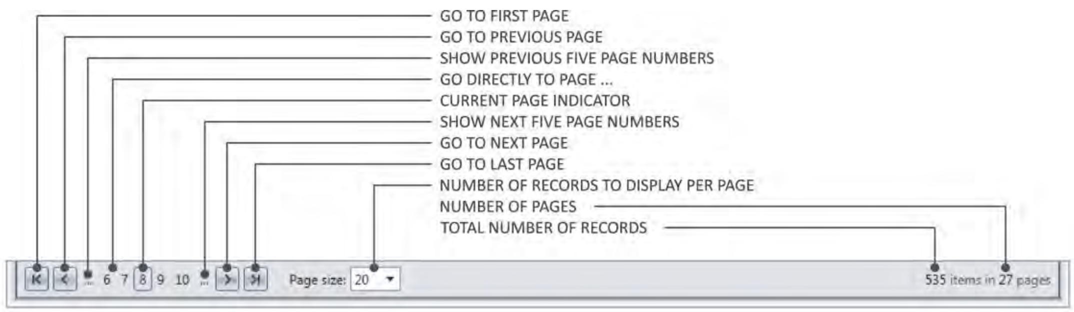


Figure 22 - Page Navigation Tool

This navigation tool is shown throughout GMS where there are many records to navigate (for example in the Application Search and Award Search screens).

- Control the number of records displayed in the current frame by clicking on the drop-down list beside Page Size and selecting 10, 20, or 50. The total number of records stays the same, but the number of pages (shown in the lower right side) updates based on how many records per page you select.
- Click on any of the navigation arrow boxes to move through the pages of records, or select a specific page by clicking on the page number as shown in Figure 22.

5.2.4.1.1 The Available Funding Dashboard

The Available Funding dashboard displays a list of funding programs (Notice of Funding Availability – NOFAs) that you can use to apply for a grant, as shown in Figure 23.

Figure 23 - GMS Home Page - Available Funding Dashboard

The following fields are shown in columns for each NOFA record:

View: Click the magnifying glass icon in this column to display a popup window the basic parameters of the funding program as shown in Figure 24, including a Summary, Start and End Date, Grant Application Deadline Dates, and Eligibility Requirements.

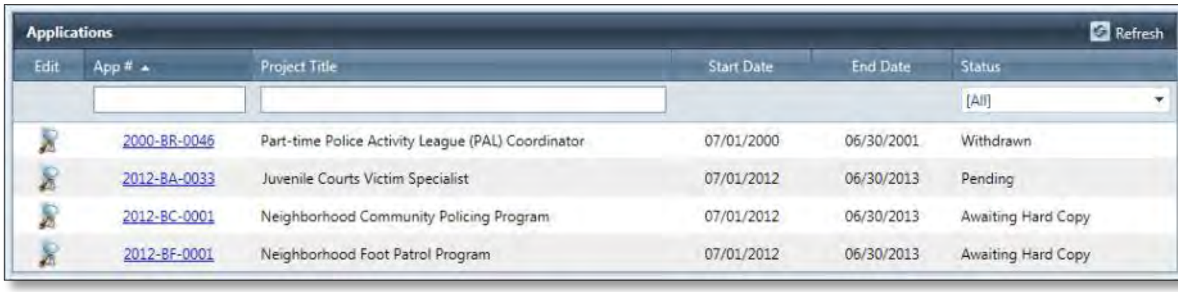
Figure 24 - NOFA Basic Parameter Information Pop-up Window

Code: A 4-letter code assigned by GOCCP to each funding opportunity.
Title: The title of the NOFA – the name of the funding program and the funding year.
Deadline: The date that all grant applications based on the NOFA must be submitted by.
Active: The checkbox in this column indicates whether or not the NOFA is currently active. To view only NOFA records that are active, select *Active* from the drop-down box directly beneath the column heading.
Docs: A blue marble icon is shown in this field if a NOFA has supporting documentation associated with it. Click on the icon to download and review the document.
Apply: Click on the checkmark icon in this field to create an application for a grant based on this NOFA. Refer the section ***Apply for a Grant*** for detailed instructions.

You can sort/filter and search for records shown in this dashboard using the column headings and fields directly below them. Refer to the section ***Sorting, Filtering, and Searching for Records*** for details.

5.2.4.1.2 The Applications Dashboard

The Applications Dashboard contains a list of grant applications your organization has created. NOTE: Applications that you submitted, which have been approved and awarded to your organization, are not shown in this dashboard.



Edit	App #	Project Title	Start Date	End Date	Status
					[All]
	2000-BR-0046	Part-time Police Activity League (PAL) Coordinator	07/01/2000	06/30/2001	Withdrawn
	2012-BA-0033	Juvenile Courts Victim Specialist	07/01/2012	06/30/2013	Pending
	2012-BC-0001	Neighborhood Community Policing Program	07/01/2012	06/30/2013	Awaiting Hard Copy
	2012-BF-0001	Neighborhood Foot Patrol Program	07/01/2012	06/30/2013	Awaiting Hard Copy

Figure 25 - GMS Home Page - Applications Dashboard

The following fields are shown in columns for each Application record:

Edit: Click the magnifying glass icon in this column to view/edit an application's contents. You will leave your GMS home page and be taken to the Grant Application Menu where you can continue working on the application.

Figure 26 - Grant Application Menu

- Refer to the section ***Apply for a Grant*** for detailed instructions on how to use this screen.
- You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

App #: The unique identifier code assigned to an application when you create it. The format represents the year you applied, the funding application code and a four-digit system generated number. The application number is underlined; click on it to view summary information about the application, as shown in Figure 27.

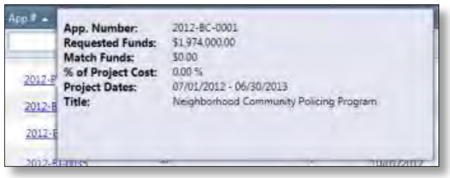


Figure 27 - Application Summary Popup

Project Title: The title your organization provided for the grant application when creating it.
Start Date: The date the project will start (defined by NOFA).
End Date: The date the project will end (defined by NOFA).
Status: Shows the status of each grant application in the dashboard. Each application shown in the dashboard will be in one of the following four statuses:

- **Pending**: The application is still in progress and has not yet been submitted.
- **Pending Revision**: The application was submitted but returned to the applicant for revision.
- **Awaiting Hardcopy**: The application has been submitted electronically and the GOCCP is currently awaiting the paper copy.

You can sort/filter and search for records shown in this dashboard using the column headings and fields directly below them. Scrolling up/down or left/right is available to access all information provided. For example, you can filter the list of records to only display those with a status of *Awaiting Hardcopy*. Refer the section ***Sorting, Filtering, and Searching for Records*** for details.

The Applications dashboard does not show applications that have been approved and awarded as grants. However, you can view all applications your organization has created regardless of status using the Application Search feature of GMS.

From your GMS Home Page, select Application Search from the Grant Management menu:

Figure 28 - Access the Application Search Feature

This displays the Application Search screen, which is a more detailed listing than shown in the Applications dashboard:

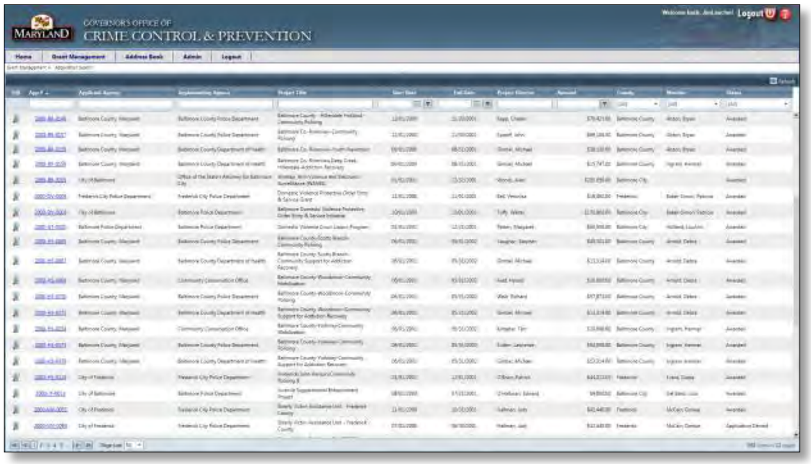
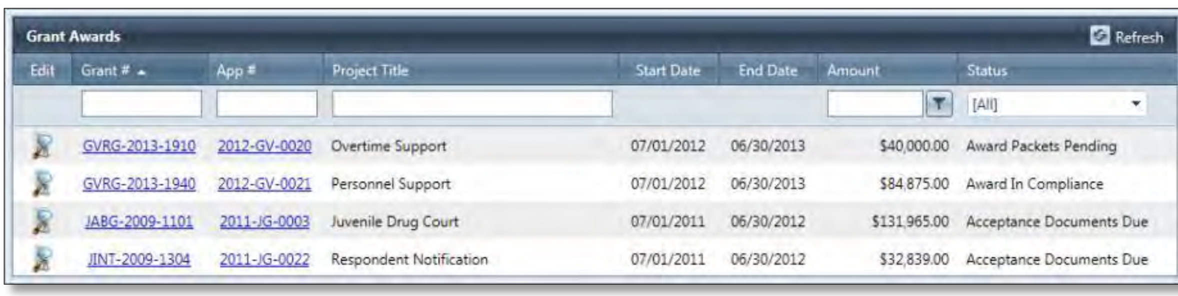


Figure 29 - Application Search Screen

You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

5.2.4.1.3 The Grant Awards Dashboard

The Grant Awards dashboard displays a list of grants your organization has been awarded.



Grant Awards — Refresh

Edit	Grant #	App #	Project Title	Start Date	End Date	Amount	Status
							[All]
	GVRG-2013-1910	2012-GV-0020	Overtime Support	07/01/2012	06/30/2013	$40,000.00	Award Packets Pending
	GVRG-2013-1940	2012-GV-0021	Personnel Support	07/01/2012	06/30/2013	$84,875.00	Award In Compliance
	JABG-2009-1101	2011-JG-0003	Juvenile Drug Court	07/01/2011	06/30/2012	$131,965.00	Acceptance Documents Due
	JINT-2009-1304	2011-JG-0022	Respondent Notification	07/01/2011	06/30/2012	$32,839.00	Acceptance Documents Due

Figure 30 - GMS Home Page - Grant Awards Dashboard

The following fields are shown in columns for each Grant Award record:

Edit: Click the magnifying glass icon in this column to view/edit an award. You will leave your GMS home page and be taken to the Grant Award Menu where you can manage the award and perform programmatic and financial reporting.

Figure 31 - Edit Grant Award Information

- Refer to the section **Error! Reference source not found.** for detailed instructions on ow to use this screen.
- You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

Grant #: The unique identifier code assigned to a grant when it is awarded. The grant award number is underlined; click on it to view summary information about the award.

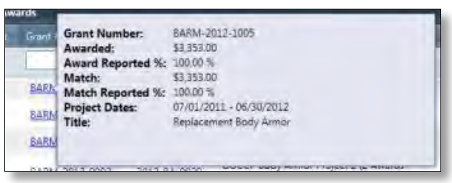


Figure 32 – Grant Award Summary Popup

App #: The application number of the application that the grant award was based on. The application number is underlined; click on it to view summary information about the application for this grant award.

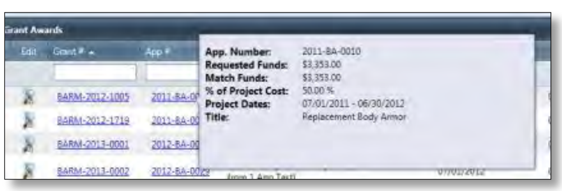


Figure 33 - Application Summary Popup for a Grant Award

Project Title: The title of the awarded grant.
Start Date: The start date of the grant award.
End Date: The end date of the grant award.
Amount: The grant funds awarded to the grant.
Status: Shows the status of each grant award in the dashboard. Each award shown in the dashboard will be in one of the following three statuses:

- **Acceptance Documents Due**: The grant has been awarded and the GOCCP is currently awaiting the acceptance documents from your organization.
- **Award in Compliance**: The grant award terms are currently satisfied.

- **Award Not in Compliance**: The grant award terms are currently not satisfied – often this indicates that financial and programmatic reports are overdue.

You can sort/filter and search for records shown in this dashboard using the column headings and fields directly below them. For example, you can filter the list of records to only display those with a status of *Award Not in Compliance*. Refer to the section ***Sorting, Filtering, and Searching for Records*** for details.

The Grant Awards dashboard does not show awards that have been closed, or are in a status other than the three described above. However, you can view all awards your organization has received regardless of status by using the Award Search feature of the GMS.

From your GMS Home Page, select Award Search from the Grant Management menu:

Figure 34 - Access the Award Search Feature

This displays the Award Search screen, which is a more detailed listing than shown in the Grant Awards dashboard:

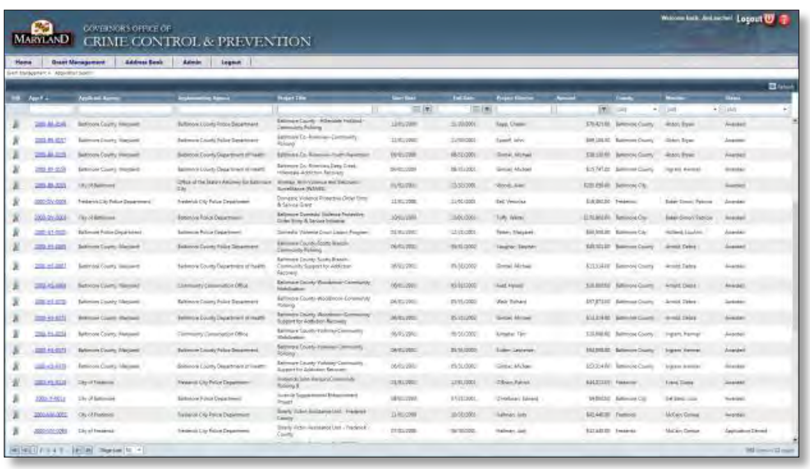


Figure 35 - Award Search Screen

You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

5.3 Sorting, Filtering, and Searching for Records

The screens, as well as the columns available to you, will vary based on your permissions as a GMS user, but the procedures described in this section work the same way in every area of GMS that presents a list of records, including the Home Page dashboards and the Application and Award Search screens.

The Award Search screen is used for the examples in this section. GOCCP personnel can use this screen to search for all grants awarded through the agency, while external organizations (sub-recipients) will see only grants that have been awarded to their organization.

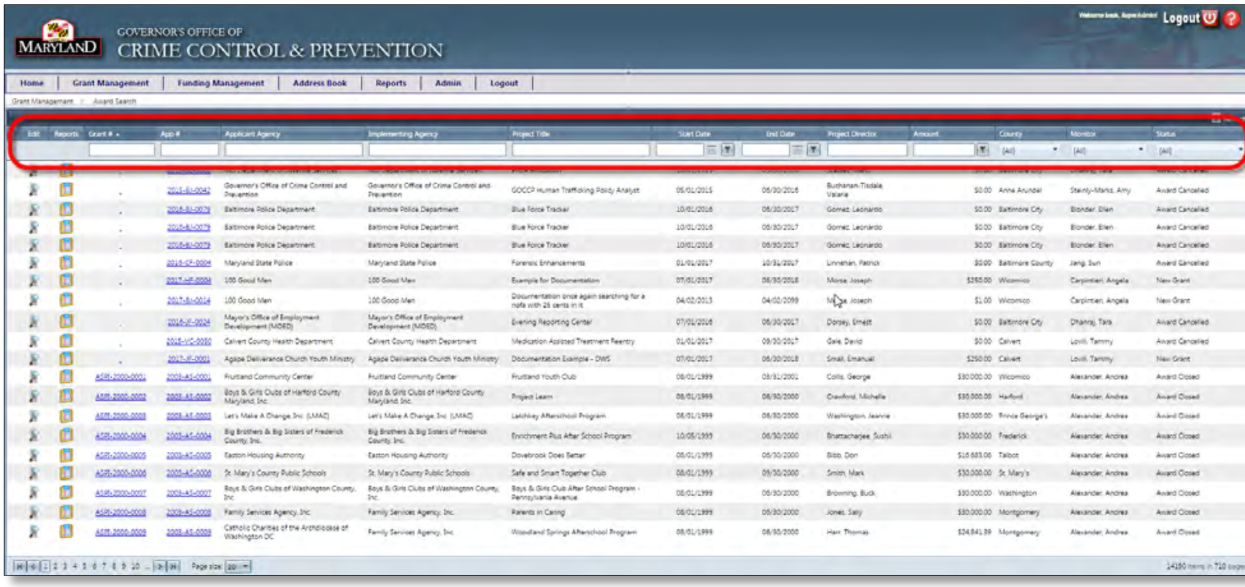


Figure 36 - Sorting, Filtering, and Searching using the Award Search Screen

5.3.1 Sorting Records in GMS

Record lists can be sorted by a column in ascending order (A at the top, Z at the bottom), descending order (Z at the top, A at the bottom) or not at all. If a scrollbar is present at the bottom or to the right, there are additional items to select from.

When a list is sorted by a column, a small white arrow is displayed to the right of the column heading text.

- If the arrow points upward, the list is sorted by the values in this column in ascending order.
- If the arrow points downward, the list is sorted by the values in this column in descending order.
- If there is no arrow beside the column heading text, the list is not sorted by the values in this column.

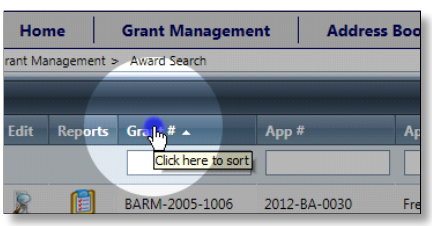


Figure 37 - Click Column Heading Text to Sort

If a listing of records in GMS is sorted by default, the arrow right is displayed immediately when you first access the screen. In Figure 37 the grant awards list is sorted by Grant Number, in ascending order, by default.

To sort your list by a specific column:

1. Move your pointer directly over the text description in the column heading until it changes into the hand shape.
2. Click the left mouse button.

3. Click again to change the sort order from ascending to descending, and once again to remove the column from sorting.

By clicking on the text description in a column heading repeatedly, you can cycle through sorting your list by that column in ascending order, descending order, or not at all.

5.3.1.1 Additive Sorting

You can sort your list of records by more than one column. For example, to sort all grant awards by End Date (most recent first), and sort those results by Status, do the following:

1. Click the End Date column heading once to sort the list in ascending order
2. Click End Date again to sort in descending order
3. Click the Status column heading once to sort in ascending order

Notice in Figure 32 the descending arrow beside the End Date column heading and the ascending arrow beside the Status column heading.

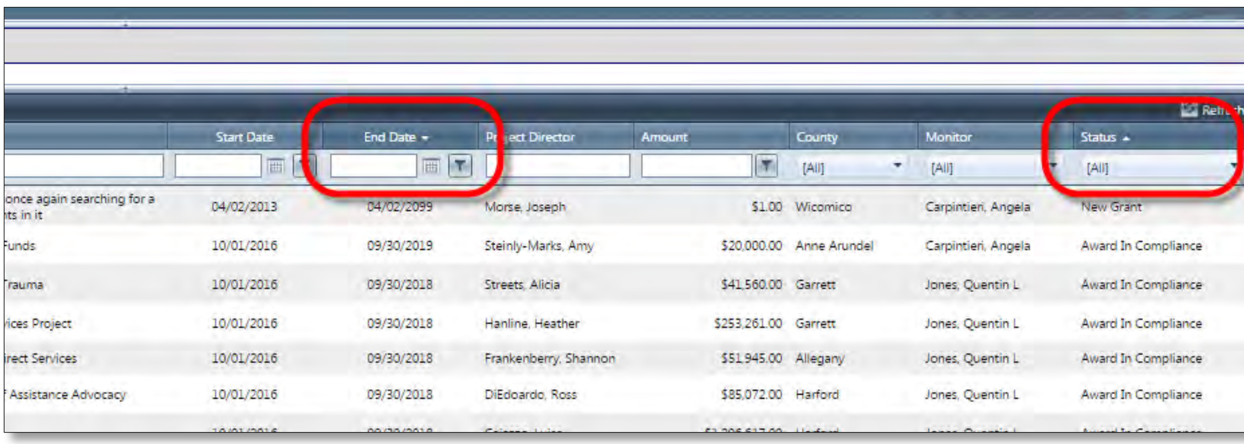


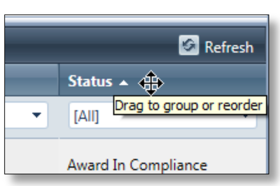
Figure 38 - Grant Award List Sorted by End Date (Descending) and Status (Ascending)

The result is a list of all the grant awards sorted by end date, where all the awards with the same end date are sorted by status.

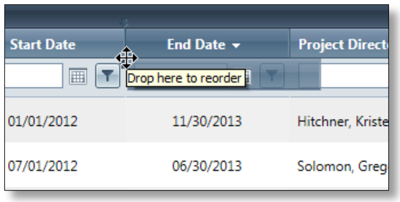
5.3.1.2 Reordering Columns

At times you may wish to see one column beside another to make viewing pertinent information easier. Using the example from Figure 38, to move the Status column in front of the End Date column:

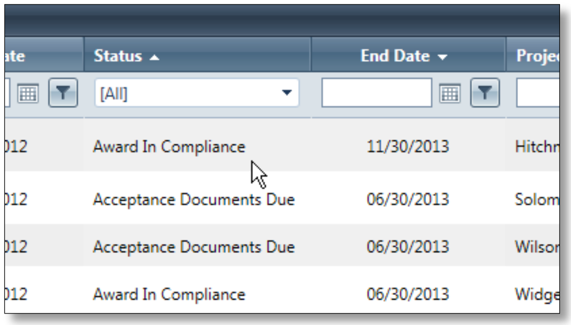
1. Move your pointer into the heading of the Status column until your pointer changes to the 4-way directional arrow.



2. When your pointer changes to this shape, click and hold your mouse button down.
3. Drag the column to its desired location until you see the text popup that says Drop Here To Reorder.



4. Release the mouse button. The column will appear in the new location.



It's important to note that by re-ordering columns, you have not changed how the list was sorted. In this example, the list was sorted first by End Date, then by Status. Even though the Status column was moved in front of the End Date column, the list is still sorted first by the End Date, then within those results, by Status.

5.3.1.3 Clearing the Sort

Additive (multi-column) sorting in GMS is a powerful tool that can help you view data exactly the way you want, and it can also produce complex results.

If the results of a multi-column sort don't display the anticipated data, look at all the column headings and make sure only the columns you wish to sort by contain an ascending or descending arrow beside the heading text.

- If you sort by a column, the records will continue to be sorted by that column until you clear it by clicking on the heading text until the sort arrow disappears.
- For example, from the sort shown in Figure 37 above, the Grant Award Search screen is automatically sorted ascending by Grant#. By not clearing Grant# as a sort column first, the actual result of that sort would be the list of records sorted first by Grant#, then End Date, then Status as shown below – instead of just End Date then Status.

5.3.2 Filtering and Searching for Records in GMS

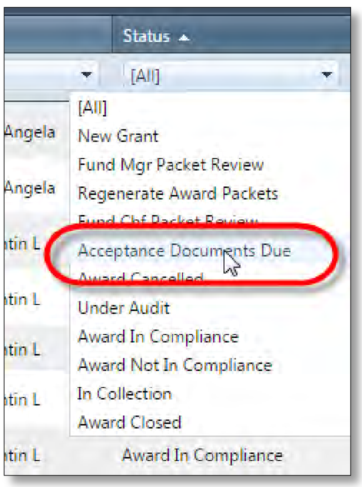
In addition to sorting, you can use filtering to find specific records or to narrow the list down based on criteria that you can type in or select from a drop-down list.

Any columns that you can use to filter your list have a white text box directly below the column heading. Boxes that have an arrow in them are drop-down lists with specific values in them that you can select.

5.3.2.1 Filtering by Selecting Values from a Drop-down List

For example, if you want to see all grant awards in your list which have a status of Acceptance Documents Due:

1. Click on the arrow on the drop-down box under the Status column heading.
2. Click on Acceptance Documents Due in the list.



This has filtered the list so that now the only records displayed are those that have a status of Acceptance Documents Due:

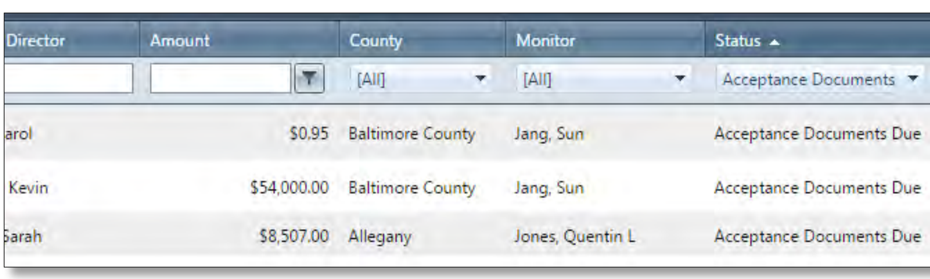


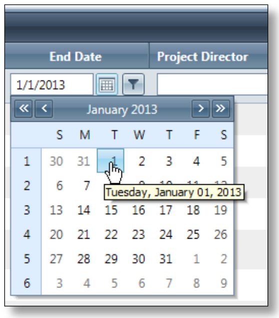
Figure 39 - Grant Award Records Filtered by Status

Important: Note that the results of the filter shown in Figure 39 are still being sorted by the End Date and Status columns as shown in the previous example (Figure 38). This is another example of *additive* sorting and filtering – the records were originally sorted by End Date, then Status and lastly filtered to show only one status.

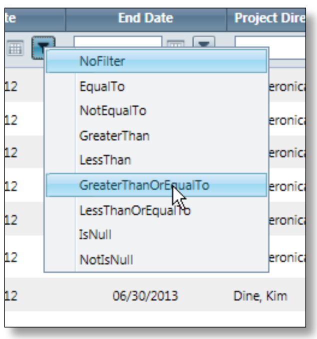
5.3.2.2 Filtering using Dates

Filtering by Date is a two step process. For example, to see all grants that were awarded that end on or after January 1st 2013:

1. Type 1/1/2013 into the date box below the End Date column heading, or alternatively choose the date by clicking on the calendar icon, navigating to the month and year, and selecting the day.



2. Click the filter icon beside the calendar and click on GreaterThanOrEqualTo in the list.



This has filtered the list so that now the only records displayed are those that have an End Date of 1/1/2013 or later.

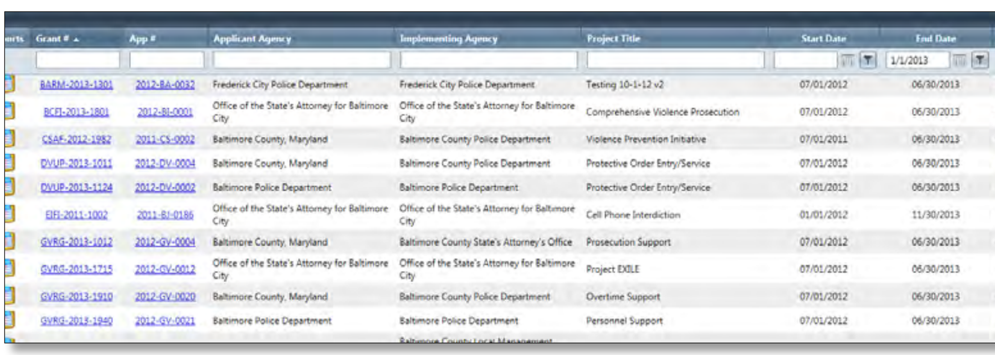
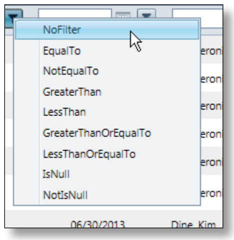


Figure 40 - Grant Award Records Filtered by End Date

To clear filter data from Date fields, you don't need to remove the date you typed in - just click on the filter icon and select No Filter.



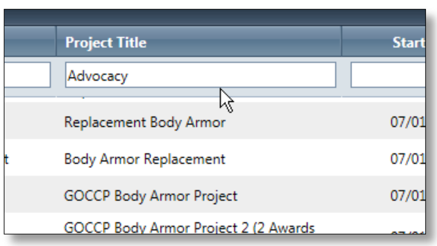
5.3.2.3 Partial and Full Match Searching/Filtering

Any columns that you can use to search/filter your list have an empty white text box directly below the column heading.

- You can enter a full text string so that the resulting list contains only those records that contain the exact string in that column, or
- You can enter just a few characters so all records that contain those characters in that field will be displayed.

For example, if you are searching for a specific grant award and you don't know the Grant # but you know that the Project Title contains the word Advocacy, you can narrow the list of records as follows:

1. Type the word Advocacy into the text box beneath the Project Title column heading.



2. Press the Enter key to perform the search/filter.

   This has filtered the list so that now the only records displayed are those that have the word Advocacy in the Project Title.

Figure 41 - Grant Awards Filtered with Partial Match

NOTE: To clear a search, you must delete the text you typed into the filter field and press the Enter key. The resulting list will no longer be filtered by the text only *AFTER THE ENTER KEY IS PRESSED*.

5.3.3 Combining Sorting and Filtering

The following example illustrates combining sorting and filtering to produce exact search results. To see a list of Grant Award records, sorted by End Date (most recent first) for which the Implementing Agency contains Baltimore, the Project Title contains the word Armor, and the award End Date is on or after 1/1/2006, you would do the following:

1. Click on the Grant # column heading TWICE (by default, the list is sorted ascending by Grant # so you must click the heading twice to remove sorting by this column).
2. Type Baltimore into the text box below the Implementing Agency column heading.
3. Press the Enter Key.
4. Type Armor into the text box below the Project Title column heading.
5. Press the Enter Key
6. Type 1/1/2006 into the text box below the End Date column heading.
7. Click on the filter icon beside the calendar icon and select GreaterThanOrEqualTo.
8. Click on the End Date column heading TWICE (first click makes the sort Ascending, second makes it Descending).

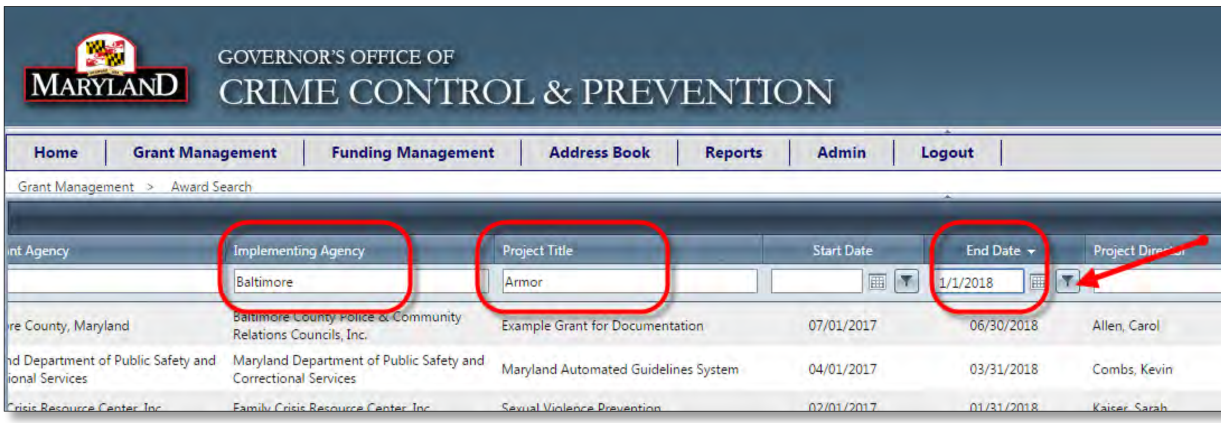


Figure 42 - Grant Award List - Multicolumn Filter and Sort

6 Funding Management (Accessibility based on permissions)

6.1 Introduction

The Funding Management process makes Federal and State dollars awarded to GOCCP available in the GOCCP GMS for specific programs and/or projects throughout the State of Maryland. GOCCP traditionally initiated funding in the form of Notice of Funding Availability documents. While NOFAs will still exist, they will be preceded by a GFD (Grant Funding Distribution) which will allocate the funding for each relative NOFA.

GFDs are made available to sub-recipients in the Available Funding Dashboard of the GMS home screen, which will provide parameters of the available funds. Each GFD has a NOFA document attached to it that sub-recipients can view for details and application requirements.

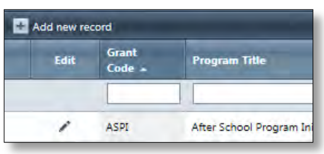
6.2 Funding Programs

6.2.1 Create a Funding Program

Creating a new Funding Program is the first step to creating a record of monies administered by GOCCP.

6.2.1.1 Add a New Funding Program Record

1. From the Funding Programs list, click on the *Add new record* link in the upper left hand corner of the Funding program process area, above the column headers.



Upon clicking *Add new record*, a data entry screen appears:

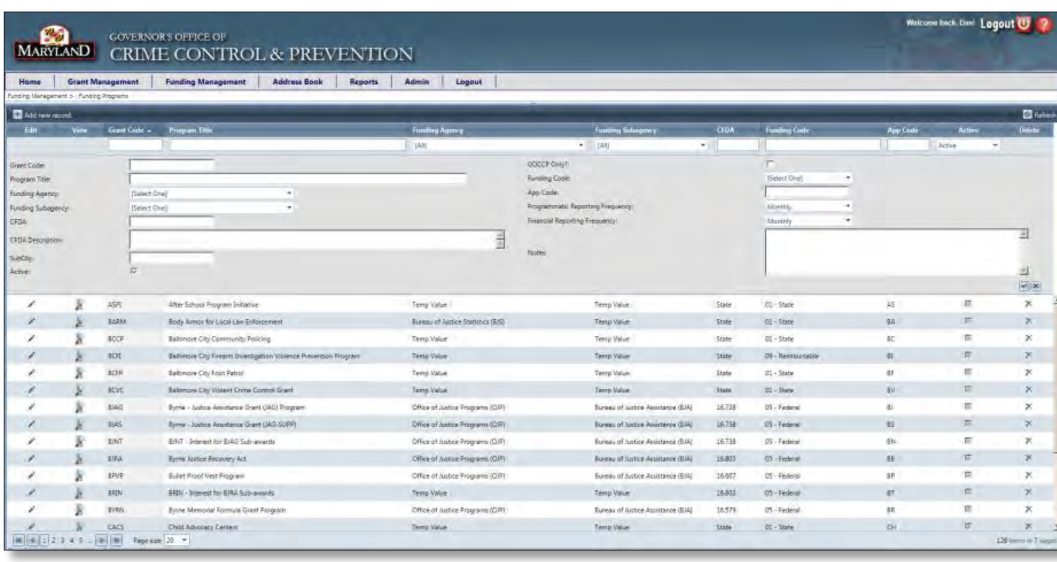
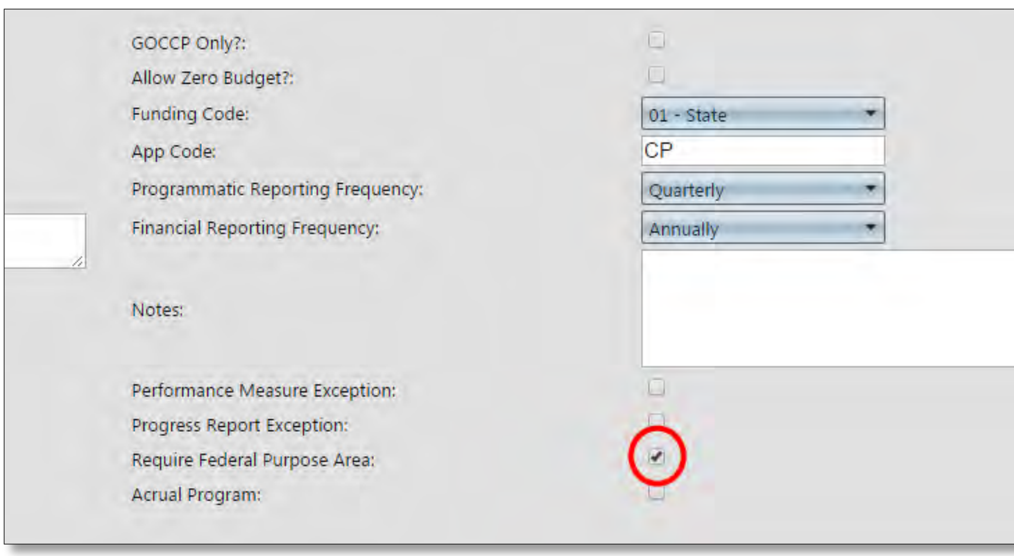


Figure 43 - Create New Funding Program – Initial Data Entry Screen

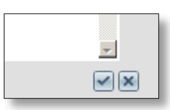
2. Complete each field in the initial data entry screen for the new Funding Program as follows:

    - Grant Code – Internally defined Grant code (Required)
    - Program Title – Name of the Program (Required)
    - Funding Agency –Selected from a drop-down list (Required)
    - Funding Sub-agency – Selected from a drop-down list
    - CFDA – Numeric code or "State"
    - CFDA Description – Free format description
    - SubObj – State category code
    - Active – Check box; click on the box for active, click again on the box for not active (box will be blank); default has box checked for Active Program.
    - GOCCP Only – Check box, default is empty; click on the box if program is GOCCP only (in-house funds not visible externally)
    - Funding Code – Either 1 – State; 3 – Special; 5 - Federal; or 9- Reimbursable
    - App Code – Internally created Application Code
    - Programmatic Reporting Frequency – Select either Monthly (default), Quarterly, Semi-Annually or Annually from the drop-down menu
    - Financial Reporting Frequency – Select either Monthly (default), Quarterly, Semi-Annually or Annually from the drop-down menu
    - Notes – Text box for data entry

NOTE: If grants based on this funding program will require a Federal Purpose Area, then you must place a checkmark in the checkbox next to **Require Federal Purpose Area**. If you do this, and a grant is submitted without a federal purpose area, it will be rejected at the Pink Sheet Phase.



3. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the Funding Program.



Press the X to cancel – you will lose any information you entered for the new program if you cancel.

Note: At a minimum, you must supply a Grant Code, Application Code, Program Title and Funding Agency in order to Save the new Funding Program.

4. Upon saving the new Funding Program, you are returned to the Funding Program screen.

   Note: This completes the initial creation of the new Funding Program. In order to complete it and make it available to the GFD creation process, you must provide the following detailed program information:

   - Contacts
   - Special Conditions
   - Performance Measures
   - Progress Reports
   - Federal Purpose
   - Activity Log
   - Documents

   To begin, locate the new Funding Program record in the list and click the View icon associated with it. The Program Menu appears to the left of the screen, and the process area corresponding to the Contacts menu item appears in the right pane of the screen.

6.2.1.2 *Add Contacts to a Funding Program (Based on assigned permissions)*

1. Add Contacts to the new Funding Program Contacts link by clicking Contacts in the Program Menu. All of the appropriate Contact Titles that can be used for the Funding Program appear in the process area. Contact Titles appear for GOCCP representatives and Federal representatives.

Figure 44 - Add Contacts to a Funding Program

2. Click on the pencil icon (Edit) to add the appropriate Contact by Title to the new Funding Program.

- Contacts for a given title are pre-designated in the system by roles and are provided in a drop-down menu.
- Only one Contact can be added for each title and not all titles need to have a Contact assigned.

3. Click the arrow on the drop-down list and click on a contact to select it. Then save the contact by clicking on the checkmark icon in the lower right hand corner of the Contact Title section.

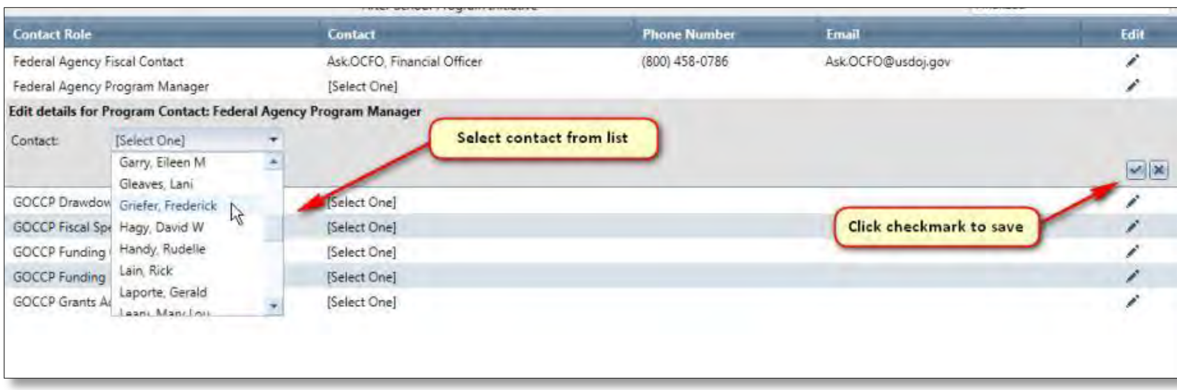


Figure 45 - Select a Contact to Assign to Funding Program

4. Repeat steps 1 through 3 for each required contact for the Funding Program.

6.2.1.3 Add Special Conditions to a Funding Program

The Special Conditions screen is used to define requirements set by the Funding Source in order to utilize the monies from the Funding Program.

1. Click Special Conditions in the Program Menu to the left of the screen.

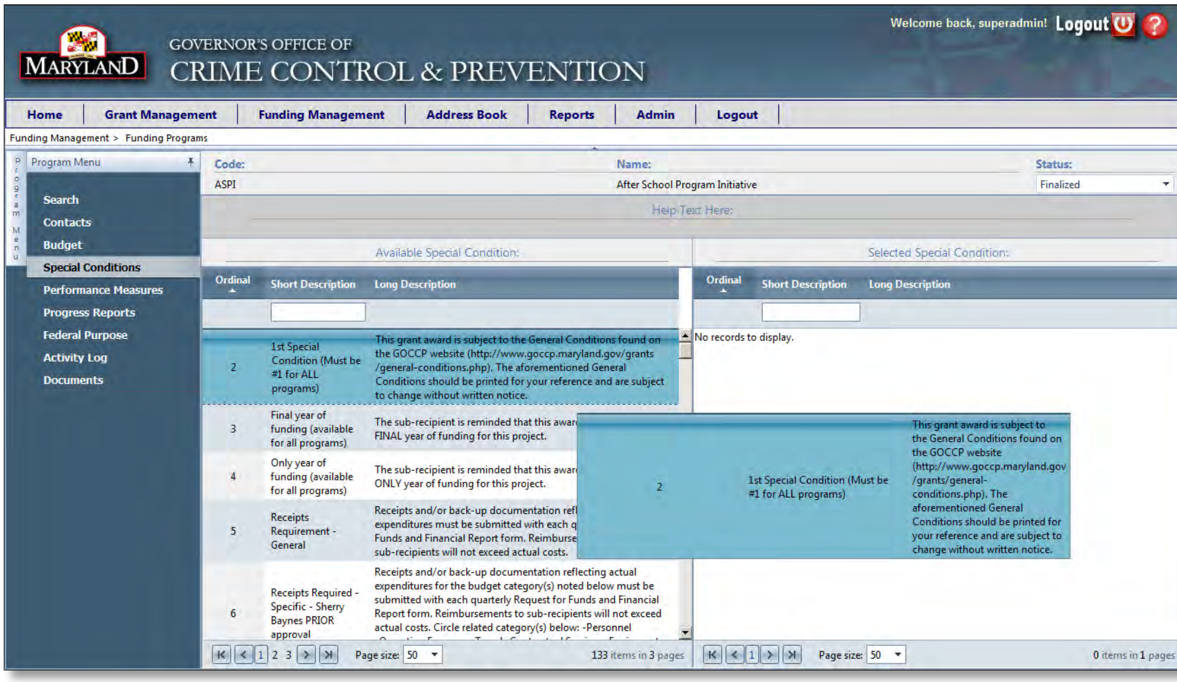


Figure 46 - Add Special Conditions to a Funding Program

- The **Available Special Conditions** pane provides a complete list of special conditions in the GMS database. Special Conditions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Special Conditions** pane is a list of special conditions that apply to this funding program.

To add a Special Condition to the Selected pane:

1. Locate the Special Condition you wish to select for this funding program. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
2. Left click on the Special Condition and hold the mouse button down.
3. Drag it over to the Selected Special Condition Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Special Condition you wish to select for this funding program.

6.2.1.4 Add Performance Measures to a Funding Program

The Performance Measures screen is used to define questions the sub-recipient will answer while utilizing monies from the Funding Program.

1. Click Performance Measures in the Program Menu to the left of the screen.

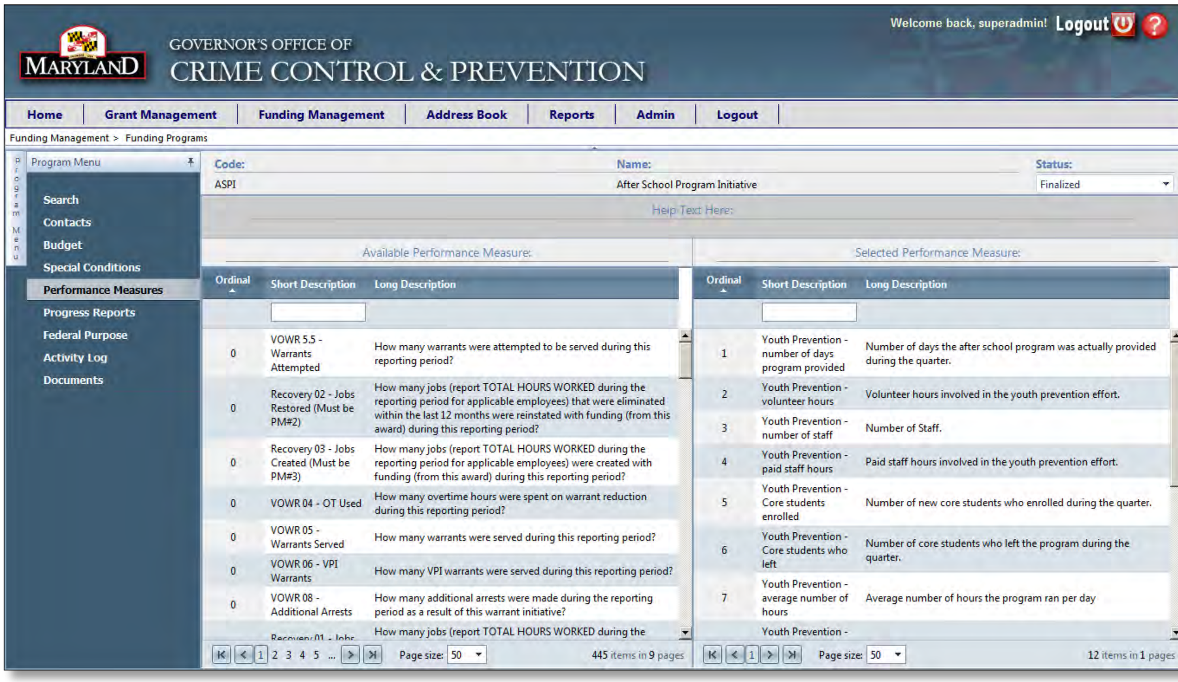


Figure 47 - Add Performance Measures to a Funding Program

- The **Available Performance Measures** pane provides a complete list of performance measures in the GMS database. Performance Measures not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Performance Measures** pane is a list of performance measures that apply to this funding program.

To add a Performance Measure to the Selected pane:

1. Locate the Performance Measure record you wish to select for this funding program. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
2. Left click on the record and hold the mouse button down.
3. Drag it over to the Selected Performance Measure Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Performance Measure you wish to select for this funding program.

6.2.1.5 Add Progress Report Questions to a Funding Program

Adding Progress Report Questions is similar to the processes of adding Performance Measures or Special Conditions to a Funding Program.

1. Click Progress Reports in the Program Menu to the left of the screen.

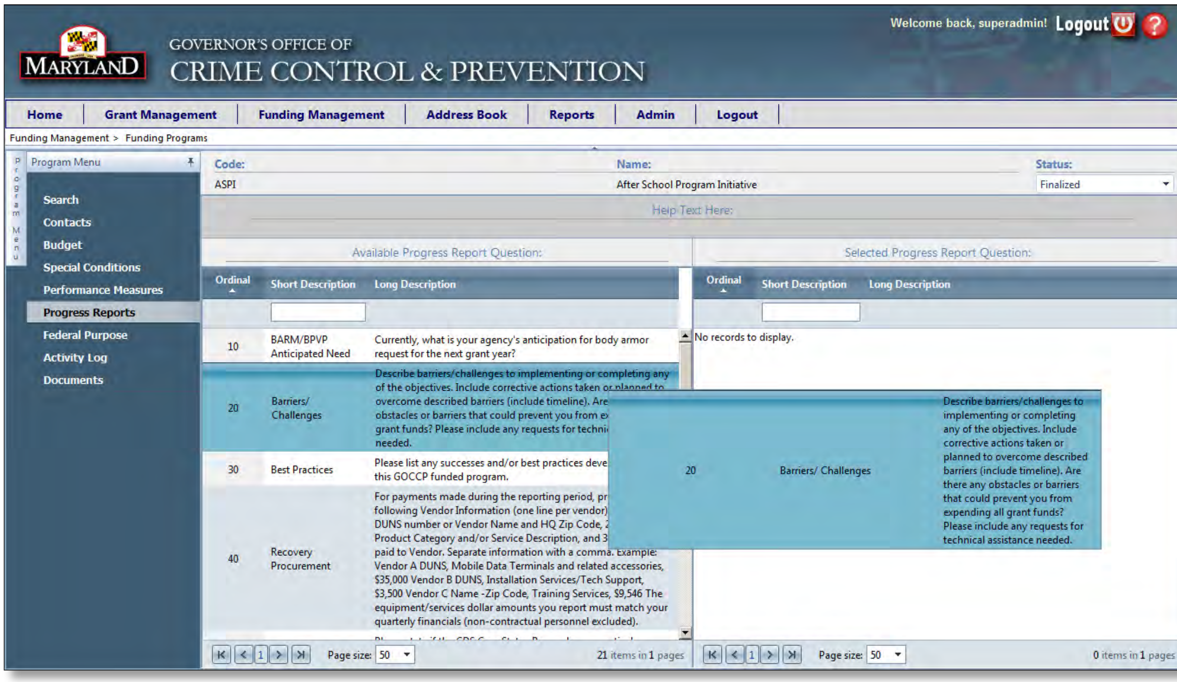


Figure 48 - Add Progress Report Questions to a Funding Program

- The **Available Progress Report Questions** pane provides a complete list of progress report questions measures in the GMS database. Progress report questions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Progress Report Questions** pane is a list of progress report questions that apply to this funding program.

To add a Progress Report Question to the Selected pane:

1. Locate the Progress Report Questions record you wish to select for this funding program. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
2. Left click on the record and hold the mouse button down.
3. Drag it over to the Selected Progress Report Questions Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Progress Report Question you wish to select for this funding program.

6.2.1.6 Add Federal Purpose Area(s) to a Funding Program

Adding Federal Purpose Area(s) is similar to the processes of adding Performance Measures, Special Conditions or Progress Report Questions to a Funding Program.

1. Click Federal Purpose in the Program Menu to the left of the screen.

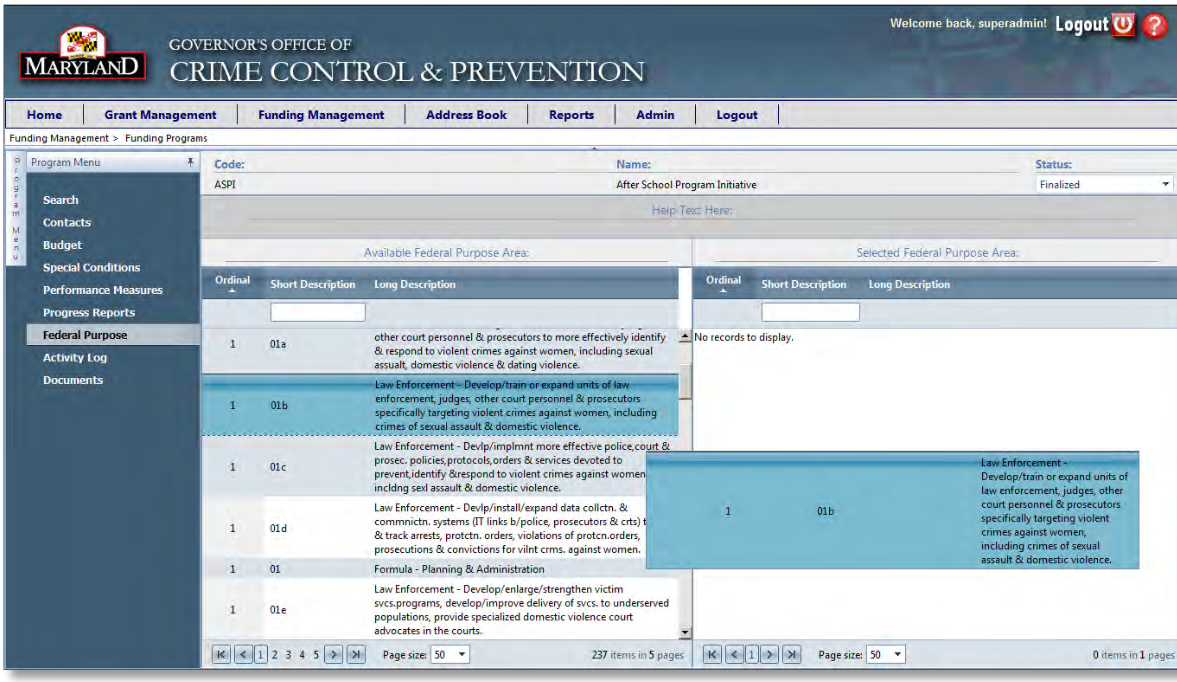


Figure 49 - Add Federal Purposes to a Funding Program

- The **Available Federal Purpose Areas** pane provides a complete list of federal purpose areas in the GMS database. Federal purpose areas not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Federal Purpose Areas** pane is a list of federal purpose areas that apply to this funding program.

To add a Federal Purpose Area to the Selected pane:

1. Locate the Federal Purpose Area record you wish to select for this funding program. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
2. Left click on the record and hold the mouse button down.
3. Drag it over to the Selected Federal Purpose Areas Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Federal Purpose Area you wish to select for this funding program.

6.2.1.7 Add an Activity Log entry to a Funding Program

Activity Log entries can be added to a Funding Program to keep track of administrative actions that occur.

1. Click Activity Log in the Program Menu to the left of the screen.

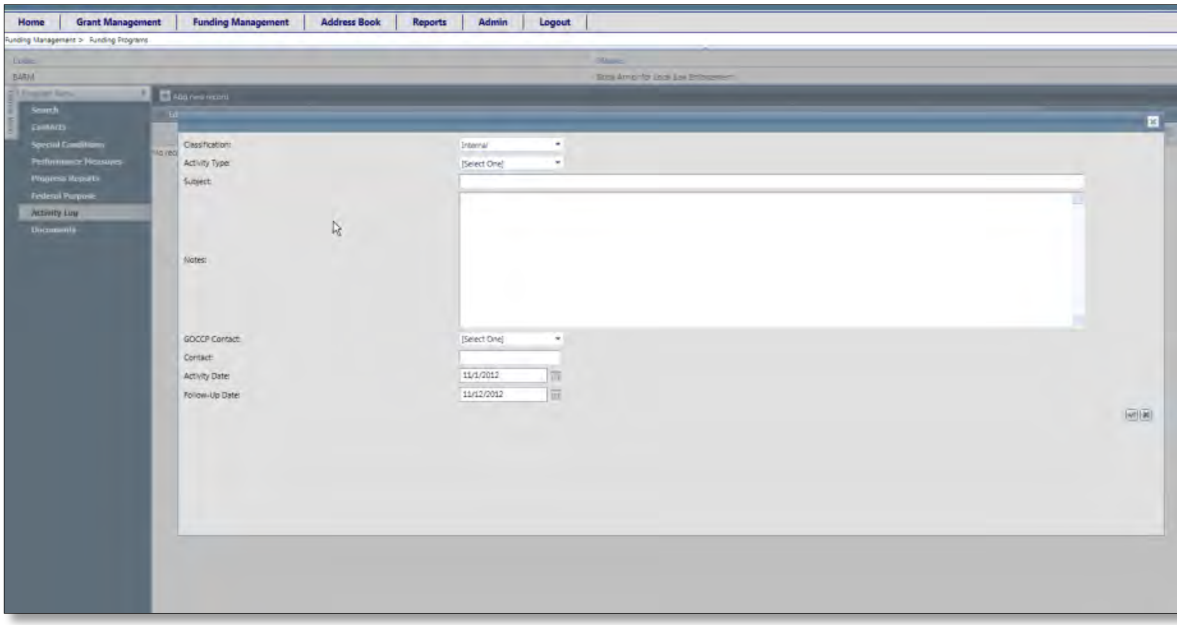


Figure 50 - Add Activity Log Entry to Funding Program

6.2.1.8 Add Documents to a Funding Program

Use this screen to attach supporting documents to a funding program.

1. Click Documents in the Program Menu to the left of the screen.

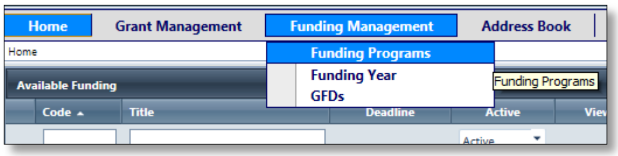
Figure 51 - Add Documents to Funding Program

2. Click the Add New Record icon to display the data entry screen.
3. Select a classification for the document from the Classification drop-down list.
4. Type a descriptive name for the document in the Document Name field.
5. Click the Select button beside the Document field. This brings up a standard dialog box that allows you to search for the document on your hard disk and select it.
6. If applicable, click the calendar icon next to the Expiration Date field and choose a date by clicking on it
7. Type a description into the Description field.

8. Click the checkmark icon to the lower left of the screen to upload and save the document to the Funding Program. If you click on the cancel icon (X), the document will not be uploaded or saved and you'll be returned to the previous screen.

6.2.2 View Funding Programs

Place the cursor over the Funding Management menu item, then select Funding Programs from the drop-down list to Add, View, Edit, Delete and Search Funding Programs. The system displays the current list of all Funding Programs (by default initially displays only Active programs).



Note: You must have appropriate system permissions to Add, Edit or Delete Funding Programs.

All funding programs are displayed in the process area as shown below:

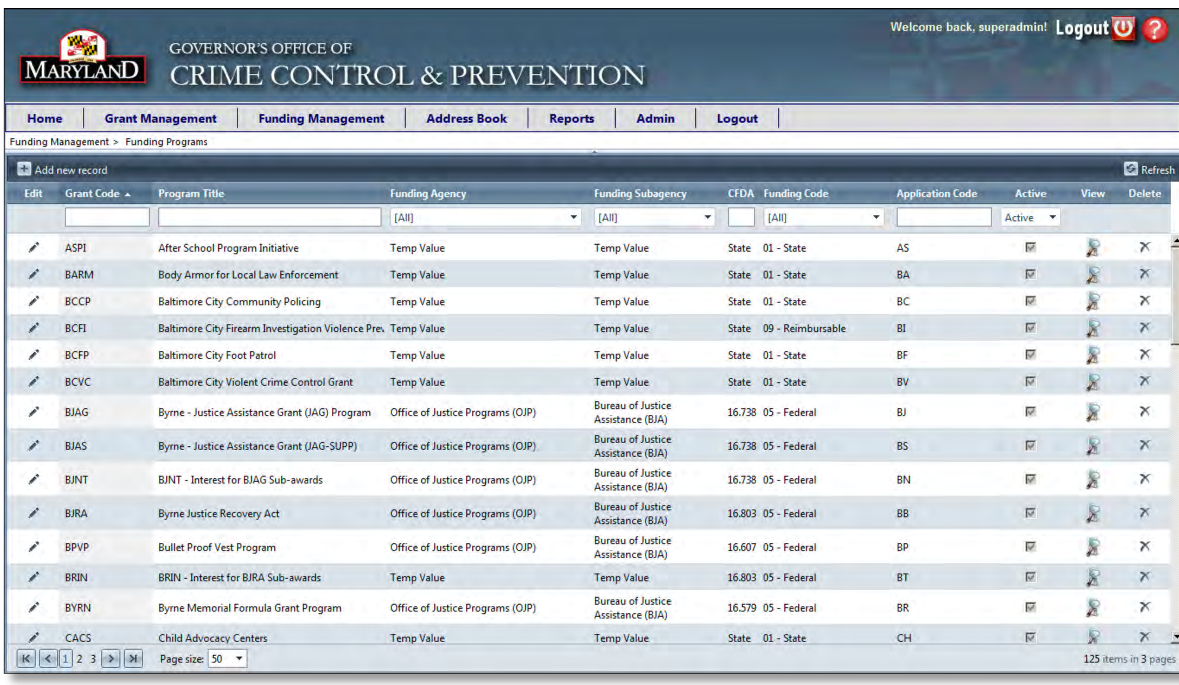


Figure 52 - Funding Management -> View Funding Program List

Each Funding Program is displayed on a separate row, and is uniquely identified by a Grant Code. Information about each program is displayed in the following columns:

- Grant Code – GOCCP assigned Code
- Program Title – User created Program Title
- Funding Agency – Valid list of Funding Agencies
- Funding Sub-agency - Federal Bureau or Agency charged with the direct oversight of specific funding source(s)

- CFDA - Catalog of Federal Domestic Assistance is a numeric code identifying Federal funds (required for audits), if not numeric it will have "State," which identifies the funding as State not Federal
- Funding Code – Identifies the source of the appropriation
- Application Code – Two letter code that specifically identifies what program the applicant is applying for
- Active/Inactive Box

Each program has three icons associated with it, shown in the following columns:

- Edit (Pencil) - Click to edit the high-level details of the Funding Program
- View (Magnifying Glass) – Click to open the Program menu; from here you can edit individual items for a Funding Program (modify Budget items, assign Special Conditions, etc.)
- Delete (X icon) - Click to delete the Funding Program record

6.2.3 Edit a Funding Program

Click on the Edit icon for a Funding Program to edit the high-level details for the program. Make any required edits, and then click on the checkmark icon to save the edits, or the X icon to cancel the editing process.

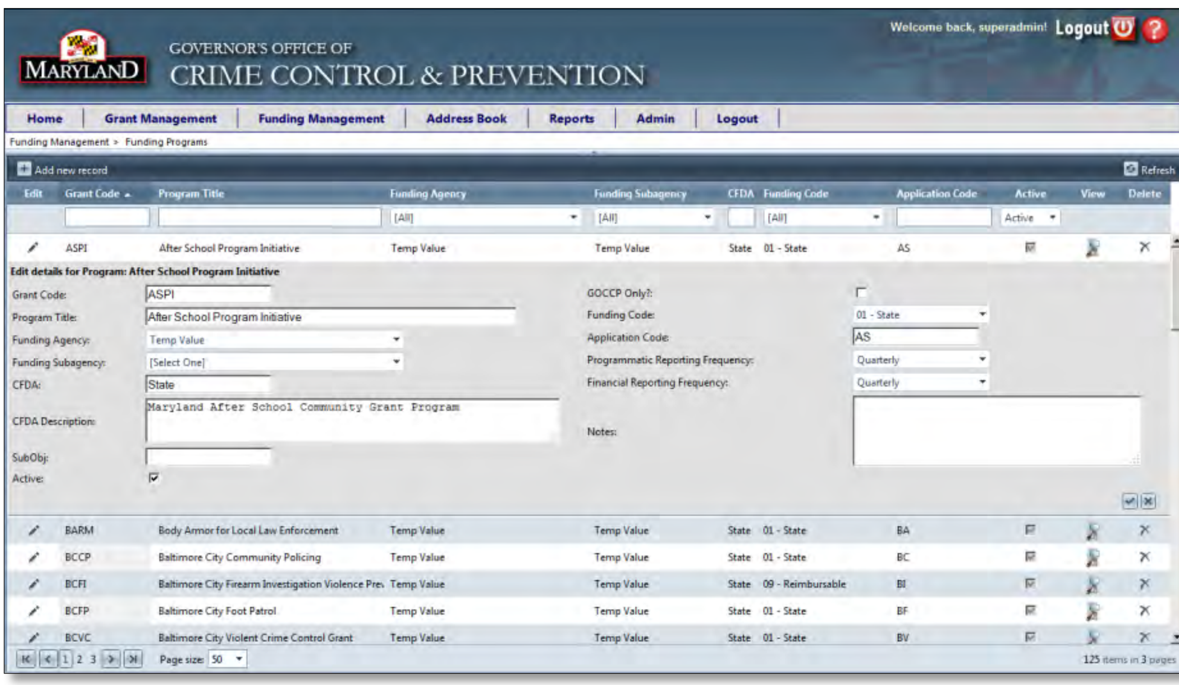


Figure 53 - Edit Funding Program

6.2.4 Delete a Funding Program

With proper system permission, you can delete a Funding Program by clicking on the X icon in the Funding Program row.

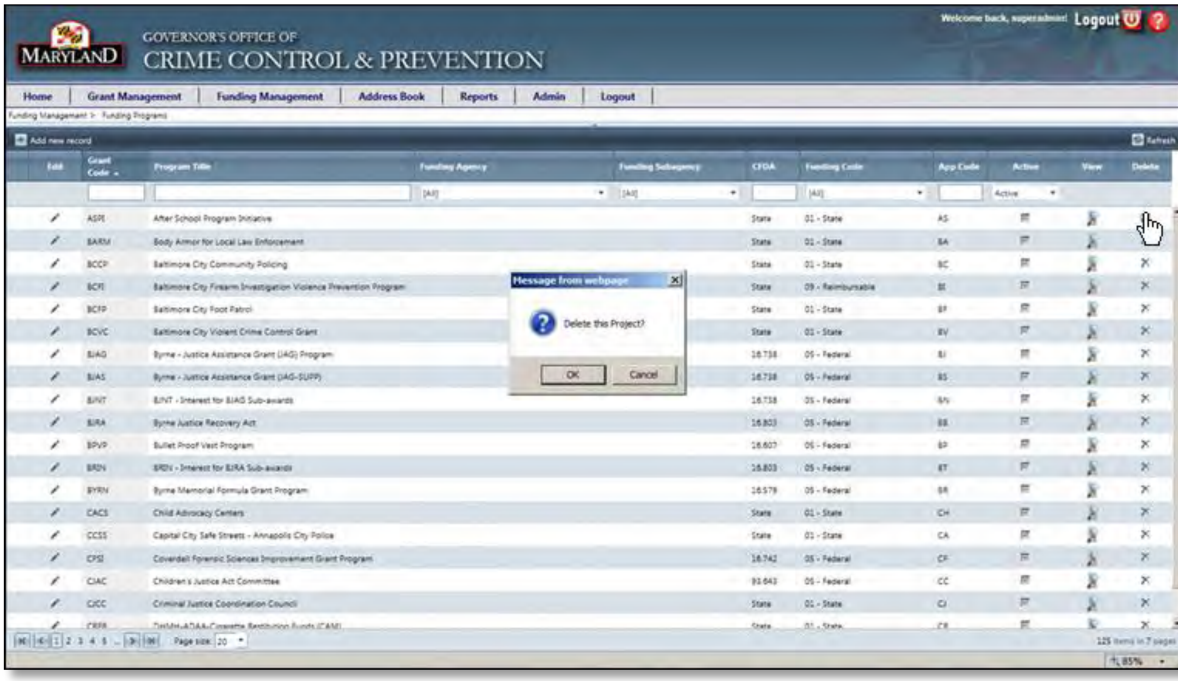


Figure 54 - Delete Funding Program

After clicking the X, a "Delete this Project?" confirmation message is displayed.

- Click the OK button to delete the Funding Program.
- If you click the Cancel button, the program is not deleted and you are returned to the Funding Program list.

6.3 Funding Years

The life of any Funding Program may span several years, with GOCCP receiving an annual amount of money to make available to sub-recipients applying for a grant based on that funding program.

- Once a Funding Program is established in the GMS, those annual dollars (or a portion of them) received by GOCCP for that program must be assigned to that program in the GMS in order to prepare a Grant Funding Distribution (GFD) that sub-recipients can apply to.
- This is accomplished by creating a Funding Year record.

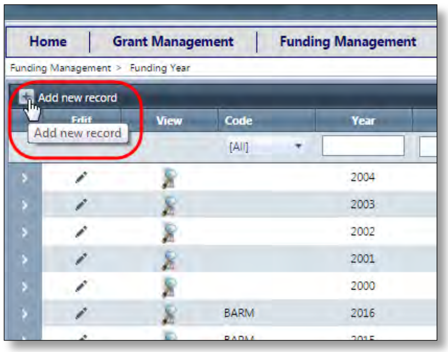
Note: You must have appropriate system permissions to Add, Edit, or Delete Funding Years.

6.3.1 Create a Funding Year

A Funding Year is applied to a specific Funding Program. If you are creating a Funding Year for a *new* funding program, be sure that the new Funding Program has already been created and finalized.

6.3.1.1 Add a New Funding Year Record

1. From the Funding Year list, click on the *Add new record* link in the upper left hand corner of the Funding Year process area, above the column headers.



Upon clicking *Add new record*, the data entry screen appears:

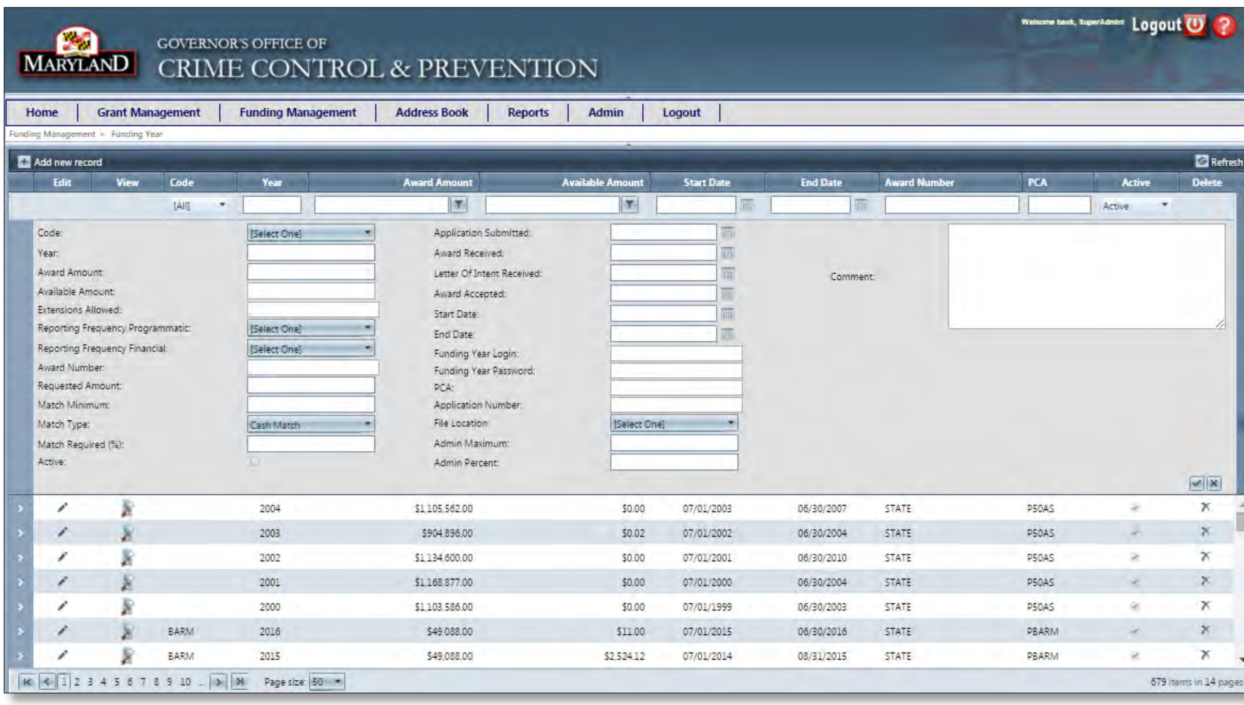


Figure 55 - Create New Funding Year – Initial Data Entry Screen

2. Complete each field in the initial data entry screen for the new Funding Year as follows:

FUNDING YEAR – "ADD NEW RECORD" FIELDS	
Code	Dropdown List: Select the code for the **Funding Program** that this Funding Year will be based upon.
Year	Type in the four-digit year that applies to this Funding Year record.
Award Amount	Type in the total amount that GOCCP has received for the funding program selected for this Funding Year record.
Available Amount	Display Only: This field displays the **Award Amount** of this Funding Year record minus: 1) The amount already awarded to sub-recipients of the GFD based on this funding year and 2) The amount reserved for administration by GOCCP.
Extensions Allowed	This is a free-form text field. Enter YES, NO, or a comment if required for this record.
Reporting Frequency Programmatic	Select the frequency with which sub-recipients will be required to perform **Programmatic** Reporting for awarded grants based on this Funding Year. The

	choices are **Monthly**, **Quarterly**, **Semi-Annually**, and **Annually**.
Reporting Frequency Financial	Select the frequency with which sub-recipients will be required to perform **Financial** Reporting for awarded grants based on this Funding Year. As with programmatic reporting, the choices are **Monthly**, **Quarterly**, **Semi-Annually**, and **Annually**.
Award Number	This is a free-form text field. Enter the Federal assigned Award Number which is tied to the Funding Program for this Funding Year record.
Requested Amount (initial app)	Enter the amount that GOCCP originally requested for this Funding Year record. This may or may not equal the **Award Amount** for this record.
Match Type	A sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food). Select the match type from the drop-down list: Select either **Cash Match**, **In-Kind Match**, or **Both**.
Match Minimum	Enter the dollar amount a sub-recipient must provide in matching funds for a grant based on this funding year. If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in the **Match Required (%)** field and the dollar amount will automatically be added in this field.
Match Required (%)	If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the **Match Minimum** field.
Active	Click the checkbox to make this Funding Year record **Active**.
Application Submitted	Enter the date the application for this Funding Year was submitted.
Award Received	Enter the date this Funding Year award was received.
Letter of Intent Received	Enter the date that the Letter of Intent for this Funding Year was received.
Award Accepted	Enter the date this Funding Year award was accepted.
Start Date	Enter the date of the first day that funding will be available for this Funding Year and associated GFD.
End Date	Enter the date of the last day that funding will be available for this Funding Year and associated GFD.
Funding Year Login	Enter the Login that GOCCP uses to access the system responsible for awarding funds for the Funding Program used in this Funding Year record.
Funding Year Password	Enter the Password associated with the **Funding Year Login** in this record.
PCA	Enter the Program Cost Account (PCA) associated with this Funding Year record. This is generally the four-digit Funding Program code associated with this Funding Year record preceded by a "P", for example **PATFP**.
Application Number	Enter the application number that the funding agency assigned to your application for funding year dollars for the Funding Program in this record.
File Location	Choose either "**Grant Manager's Room**", **Archives A8**", "**File Room 1**" or "**File Room 2**" from the drop-down list to select the physical location of the file for this Funding Year record.
Admin Maximum	Enter the maximum portion (in dollars) of the **Award Amount** for this Funding Year that can be allocated to GOCCP for administrative purposes. If you do not have a dollar amount but rather a percentage, enter the percentage in the **Admin Percent** field in this record; doing so will automatically populate this field with the correct dollar amount.
Admin Percent	If the Admin Maximum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the **Admin Maximum** field.
Comment	This is a free-form text field. Enter any notes or comments regarding this funding year that you would want other users to see when they view or edit this Funding Year record.

3. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the Funding Year.

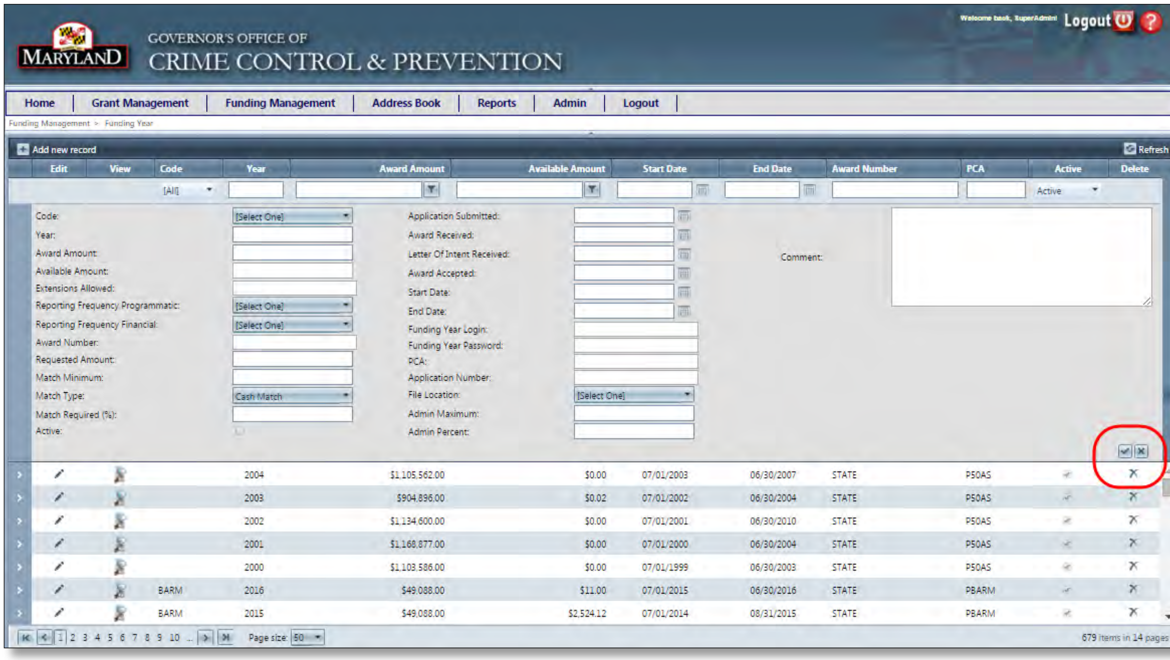


Figure 56 - Save new Funding Year record

Press the **X** to cancel – you will lose any information you entered for the new funding year if you cancel.

4. Upon saving the new Funding Year, you are returned to the Funding Year screen. To find your new record easily, filter the list by selecting the Funding Program code for the Funding Year record you just added from the Code drop-down list.

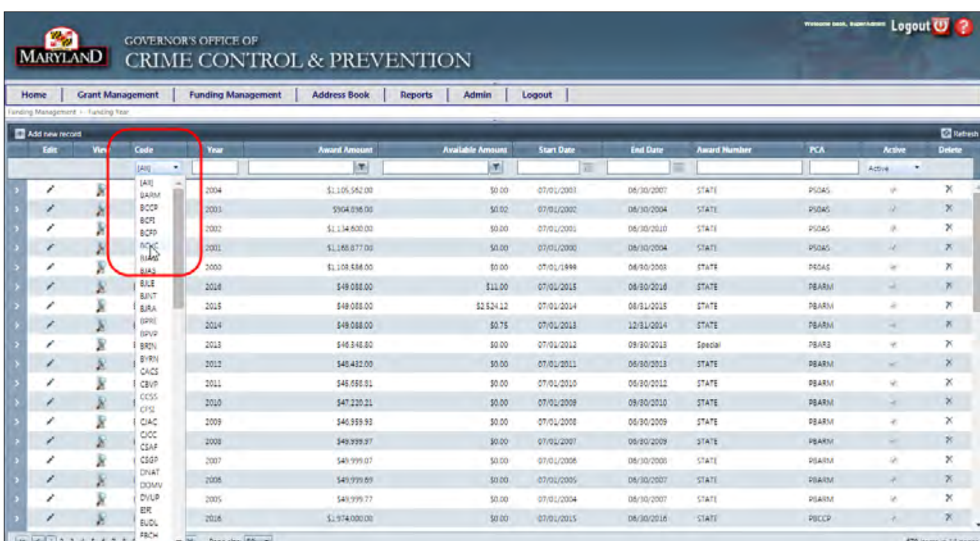


Figure 57 - Filter the Funding Year by Selecting a Funding Program Code

5. After creating the new Funding Year record, you can further define the Funding Year by adding the following types of information to it:

    - Funding Source Breakdown
    - Documents
    - GAN
    - Activity Log
    - Admin Allowance (Admin Allowance is it's own process – please refer to section 6.3.2 for detailed instructions on using Admin Allowances.)

    To further define the Funding Year, click on the magnifying glass icon in the View column of the Funding Year record you wish to add information to:

Figure 58 - Add Detail to Funding Year

6. The Funding Year Menu and Data Entry screen is displayed. Refer to the sections immediately following this one for instructions on adding new detailed information to a Funding Year.

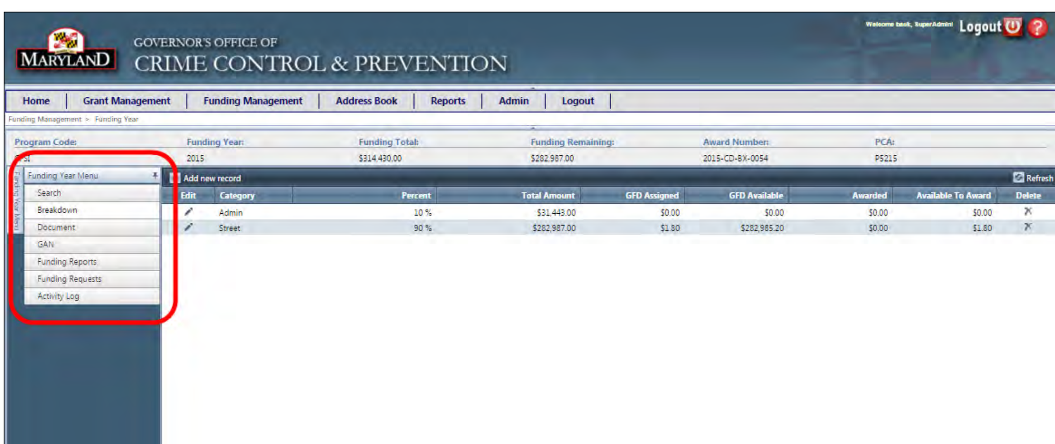


Figure 59 - Access the Funding Year Menu and Data Entry Screen

6.3.1.2 Add a Breakdown Record to a Funding Year

Funding years are further identified by various categories. Funding Source Breakdowns allows funds to be designated into Street, Admin, Passthrough, or Mandated groups.

1. Click on Breakdown in the Funding Year Menu.

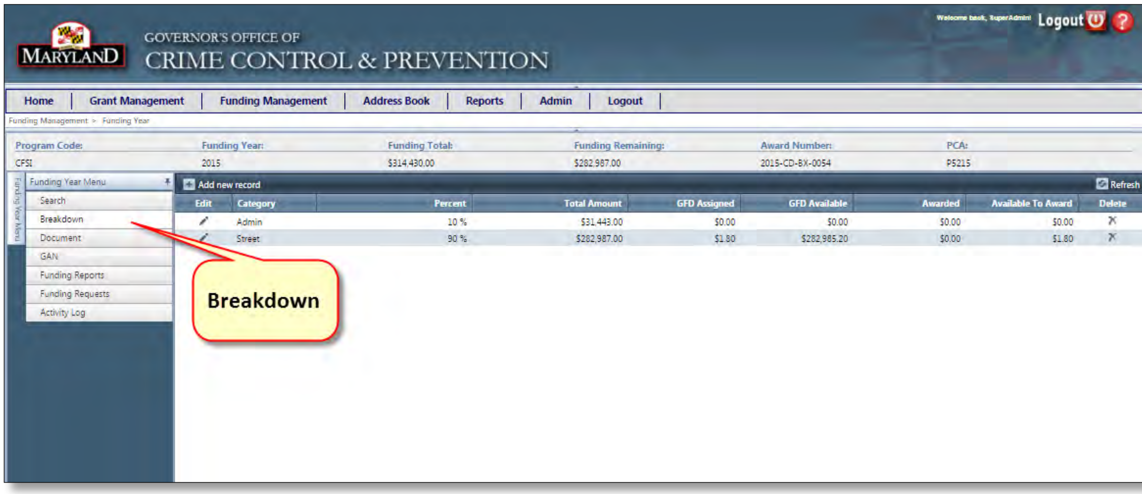


Figure 60 – Access Breakdown from Funding Year Menu

Any existing Breakdown records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

BREAKDOWN RECORD DISPLAY FIELDS	
Edit	Click the pencil icon in this column to edit an existing Breakdown record.
Category	This field displays the category for an existing Breakdown record: **Street**, **Admin**, **Pass-through**, or **Mandate**.
Percent	This field displays the percentage of the Award Amount for the Funding Year record you are currently viewing that has been allocated to this breakdown record.
Total Amount	This field displays the total dollar amount allocated to this breakdown record of the Award Amount for the Funding Year record you are currently viewing.
GFD Assigned	This field displays the dollar amount **for this breakdown** record that has been allocated to a GFD.
GFD Available	This field displays the dollar amount **for this breakdown** record that is available to be allocated to a GFD.
Awarded	This field displays the total dollar amount for the **Funding Year** you are viewing that has been awarded to sub-recipient grants.
Available to Award	This field displays the total dollar amount for the **Funding Year** you are viewing that is available to be awarded for grants to sub-recipient.
Delete	Click the X icon in this column to delete an existing Breakdown record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

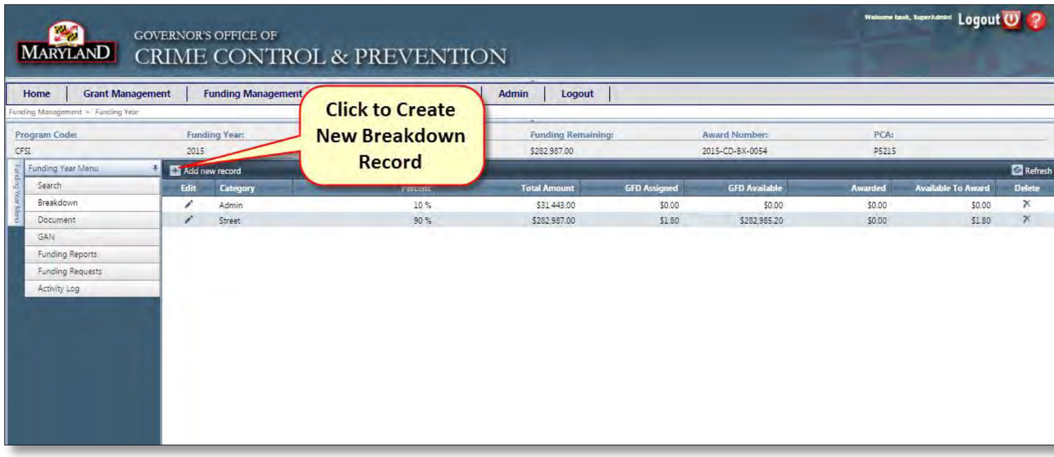


Figure 61 - Add New Breakdown Record

Upon clicking *Add new record*, the data entry screen appears:

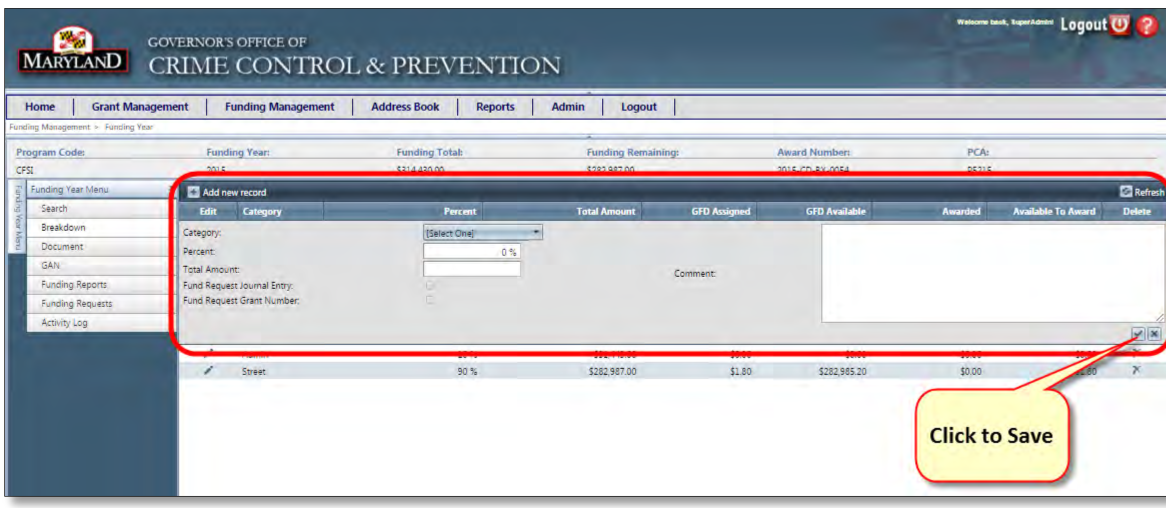


Figure 62 - Add New Breakdown Record - Data Entry Screen

3. Complete each field in the data entry screen for the new Breakdown record as follows:

BREAKDOWN – "ADD NEW RECORD" FIELDS	
Category	Select the category for this existing Breakdown record from the drop-down menu: **Street**, **Admin**, **Pass-through**, or **Mandate**.
Total Amount	Enter the amount in dollars of the **Award Amount** for this Funding Year that is to be allocated to this Breakdown record. If you do not have a dollar amount but rather a percentage, enter the percentage in the **Percent** field in this record; doing so will automatically populate this field with the correct dollar amount.
Percent	If the **Total Amount** is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be displayed in the **Total Amount** field.
Fund Request Journal Entry	***TBD***
Fund Request Grant Number	Click in the checkbox in this column to indicate that the breakdown is GFD eligible.
Comment	This is a free-form text field. Enter any notes or comments regarding this funds breakdown that you would want other users to see when they view or edit this Breakdown record.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Funding Year Breakdown record.

6.3.1.3 Attach a Document to a Funding Year

You can attach relevant documentation in various forms (word processing document, spreadsheet, email message, etc) to a Funding Year record.

1. Click on Document in the Funding Year Menu.

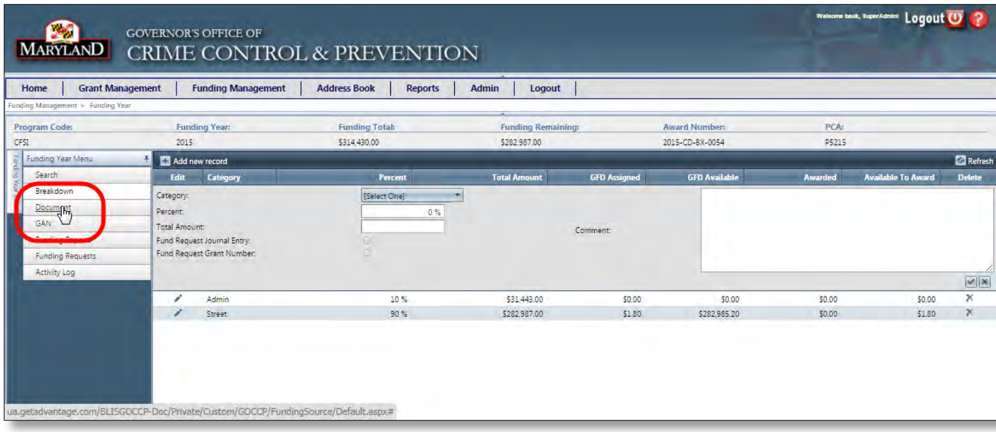


Figure 63 - Access Documents from Funding Year Menu

Any existing Document records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

DOCUMENT RECORD DISPLAY FIELDS	
NOTE: Documents are classified into various groups (you classify a document when you attach it to a Funding Year). All documents in a group are displayed below a blue-shaded header row that identifies the classification.	
Edit	Click the pencil icon in this field to edit the information associated with an existing document attached to this Funding Year.
Document	When viewing Document records, this field contains a **Download** link, which you can click on to download that document.
Document Name	The name assigned to the document when it was attached (not a file name).
Created	This field displays the date the document was attached.
Modified	This field displays the date the document record was last edited.
Modified By	This field displays the user name of the person who last edited the document record.
Delete	Click on the pencil in this column to delete this Document record, which will un-attach the attached document.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

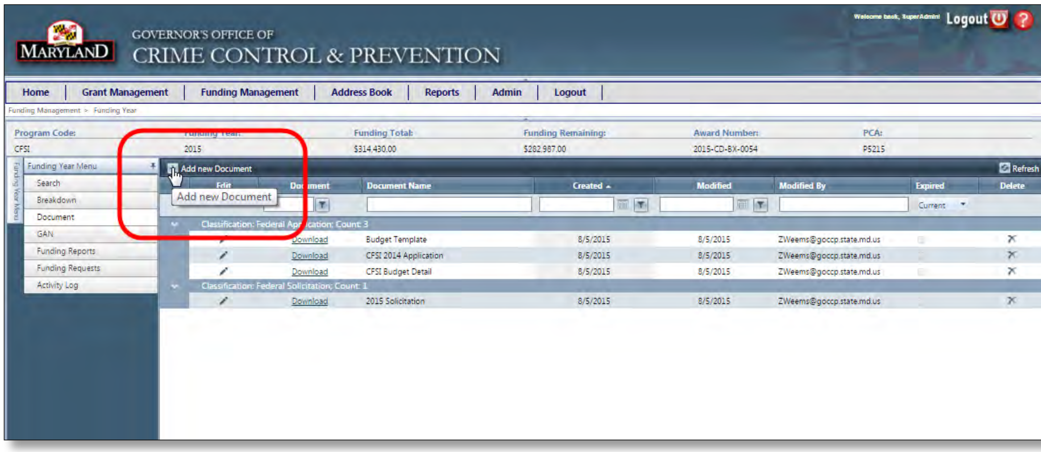


Figure 64 - Add New Document Record

Upon clicking *Add new record*, the data entry screen appears:

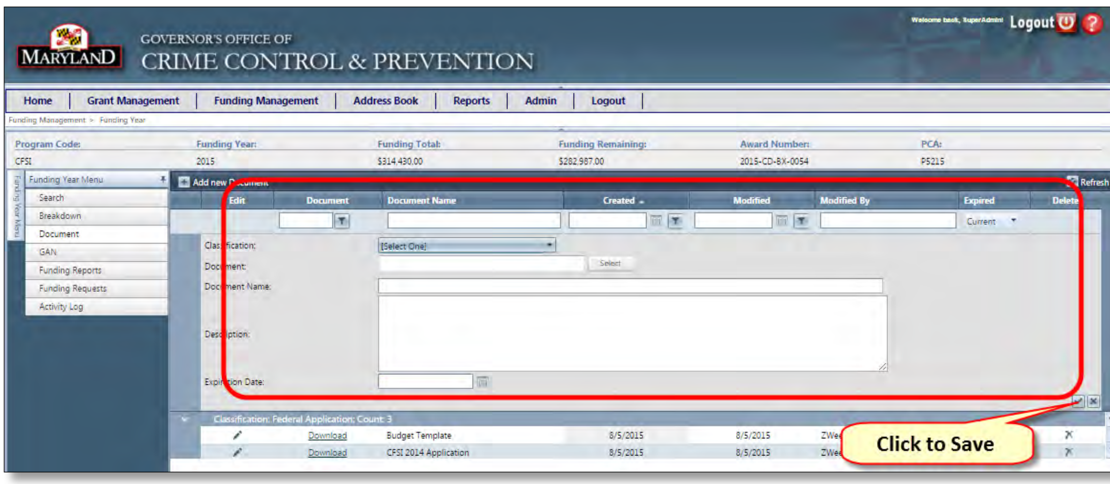


Figure 65 - Add New Document Record - Data Entry Screen

3. Complete each field in the data entry screen for the new Document record as follows:

DOCUMENT – "ADD NEW RECORD" FIELDS	
Classification	Click the **dropdown list** and select a classification for this document (General Document, etc.).
Document	Click on the **Select** button beside this field to bring up a standard dialog box which allows you to choose a document from your hard drive to attach to this Funding Year.
Document Name	After selecting the file to upload, type in a descriptive name for this document in this field. The Document Name you choose does not have to be the same name as the file you uploaded.
Description	Enter a detailed description of the document in this field. It is a free-form text field so you can make the description as detailed as you'd like.
Expiration Date	Click on the calendar icon beside this field to choose the date this document will no longer be available for viewing in this Funding Year record. Alternatively you can type the date directly into the field.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to attach the new document to this Funding Year and save the new Document record.

6.3.1.4 Add a Grant Adjustment Notice (GAN) to a Funding Year

1. Click on GAN in the Funding Year Menu.

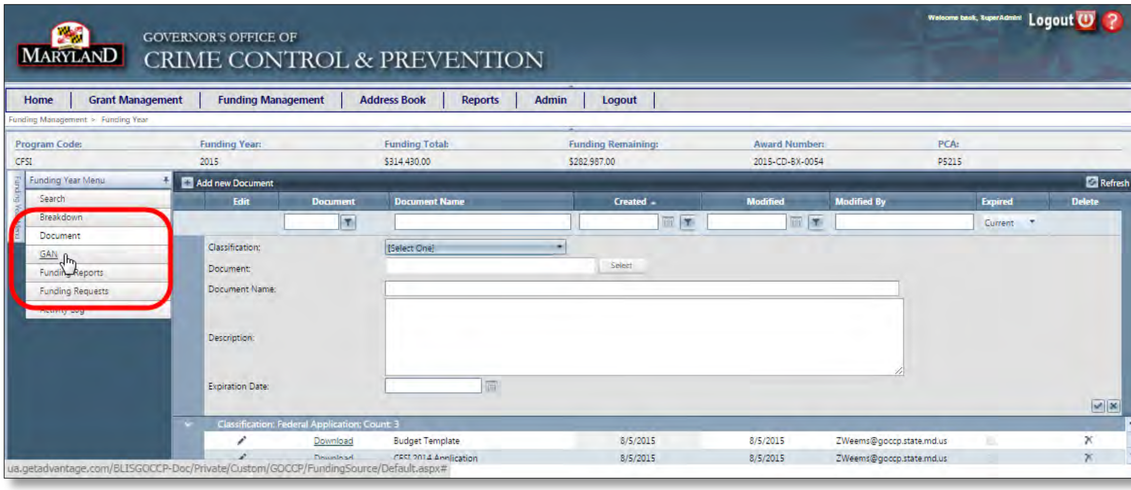


Figure 66 – Access GAN from Funding Year Menu

Any existing GAN records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

GAN RECORD DISPLAY FIELDS	
GAN Number	This field displays the unique GAN number that was assigned to this record when it was added (set automatically).
Federal GAN Number	This field displays the federal-assigned GAN number.
Approved Date	This field displays the date this GAN record was approved.
REOB/DEOB Amount	This field displays the dollar amount of the funding amendment de-obligation / re-obligation defined in this GAN record.
Start Date	This field displays the new start date (if applicable).
End Date	This field displays the new end date (if applicable).
Status	This field displays the status of this GAN record – **New** or **Approved**.
Last Update	This field displays the date that this GAN record was **last** updated – dates of prior revisions are not displayed.
Active	This field displays whether this GAN is **Active** or **Inactive**.
View	Click the magnifying glass icon in this field to edit detailed information for this GAN.
Edit	Click the pencil icon in this field to edit high-level information associated with this GAN.
Delete	Click the X icon in this field to delete this GAN record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

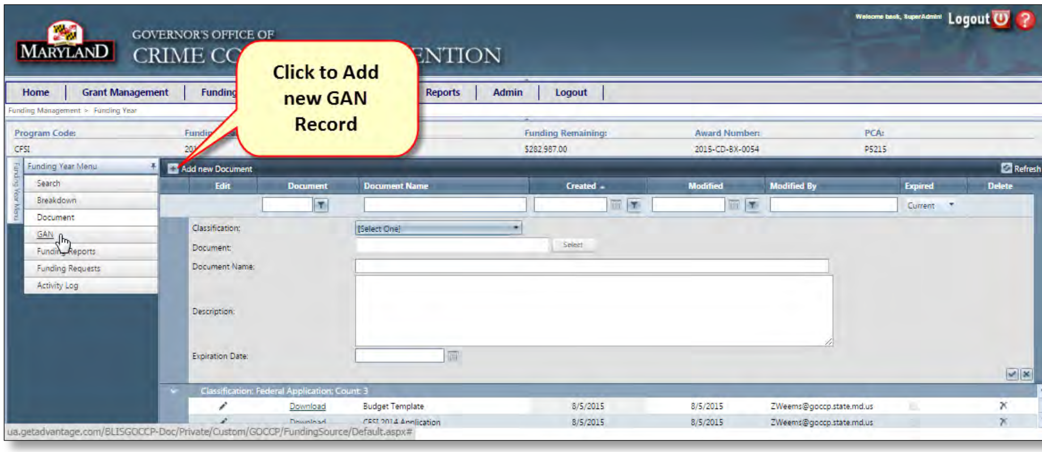


Figure 67 - Add New GAN Record

Upon clicking *Add new record*, the data entry screen appears:

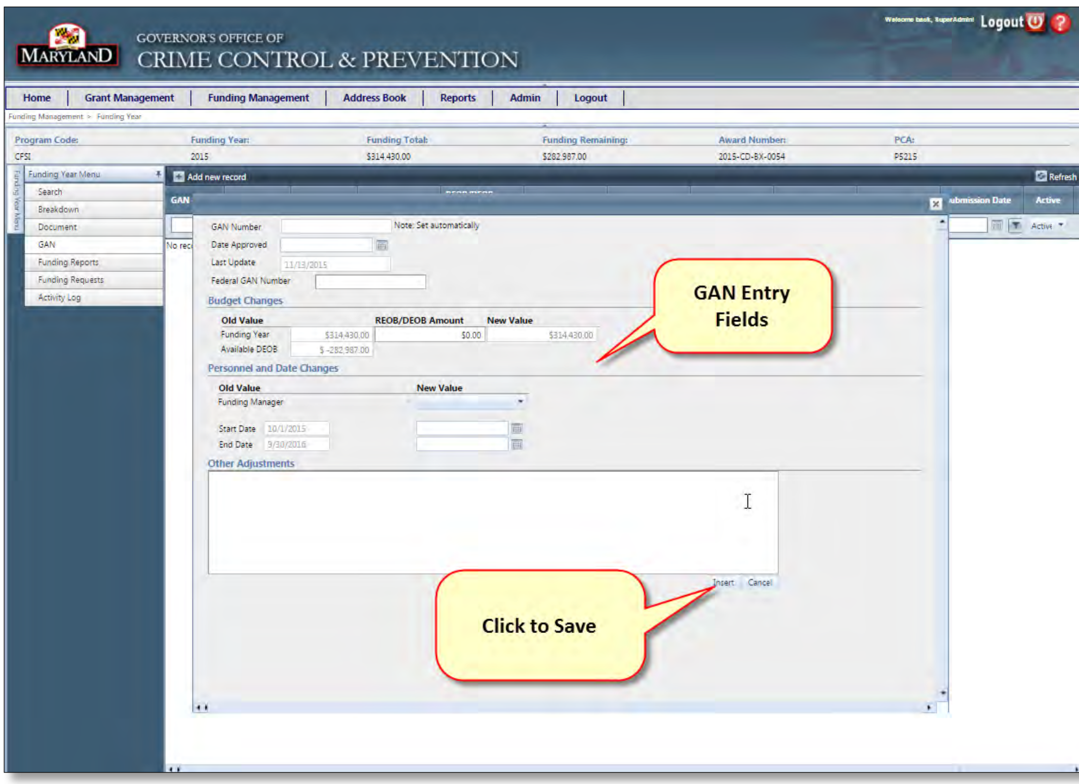


Figure 68 - Add New GAN Record - Data Entry Screen

3. Complete each field in the data entry screen for the new GAN record as follows:

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	Enter the date this GAN was approved.
Federal GAN Number	Enter the federal-assigned GAN number.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this

	field.
Budget Changes	
Funding Year	
REOB/DEOB Amount	Enter the dollar amount of the REOB/DEOB funding for this GAN.
Old Value	Display only: Displays the original total dollar amount allocated to this Funding Year.
New Value	Display only: Displays the new total dollar amount allocated to this Funding Year after the REOB/DEOB amount is entered.
Available DEOB	Display only: Displays the available DEOB dollar amount.
Available REOB	Display only: Displays the available REOB dollar amount.
Personnel and Date Changes	
Start Date	
Old Value	Display only: Displays the original Start Date of the Funding Year.
New Value	Enter the new Start Date for this Funding Year record.
End Date	
Old Value	Display only: Displays the original End Date of the Funding Year.
New Value	Enter the new End Date for this Funding Year record.
Other Adjustments	This is a free-form text field. Enter any other miscellaneous adjustments or amendments to the Funding Year based on this GAN.
Insert/Cancel	After entering the required information for this GAN, click on the **Insert** button to save the record or click the **Cancel** button to cancel adding this GAN. If you hit the Cancel button, your changes will be lost.

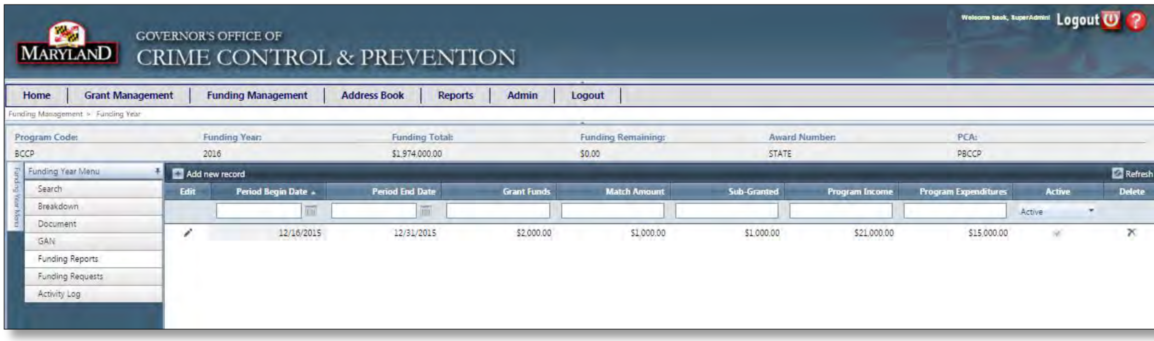
4. Click the Insert button located in the lower right hand corner of the Data Entry screen to save the new GAN record.

5. A GAN can also be added to an individual award, please see Section 3 of this document.

6.3.1.5 Add a Funding Report to a Funding Year

1. Click on Funding Reports in the Funding Year Menu.

Figure 69 – Access Funding Reports from Funding Year Menu



Any existing Funding Report records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

FUNDING REPORT RECORD DISPLAY FIELDS	
Period Begin Date	Begin date of financial reporting period.
Period End Date	End date of financial reporting period.
Grant Funds	Amount of grant funds expended this period.
Match Amount	Amount of match funds reported this period.
Program Income	Amount of program income earned during this period.
Program Expenditures	Amount of program income expended during this period.
Active	This field displays whether this Report is **Active** or **Inactive**.
Edit	Click the pencil icon in this field to edit high-level information associated with this Report.
Delete	Click the X icon in this field to delete this Report record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

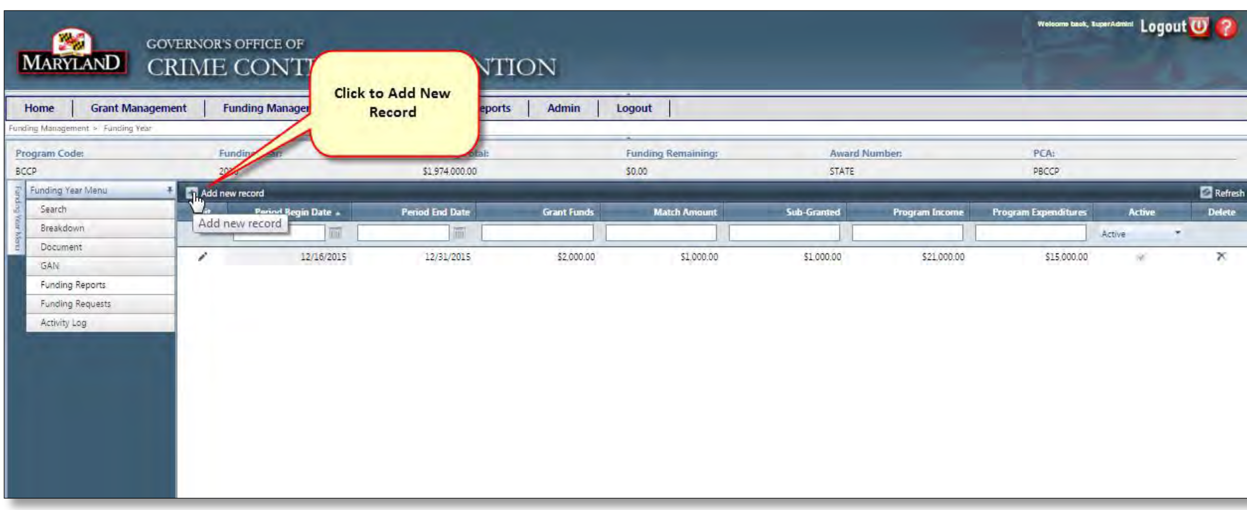


Figure 70 - Add New Funding Report Record

Upon clicking *Add new record*, the data entry screen appears:

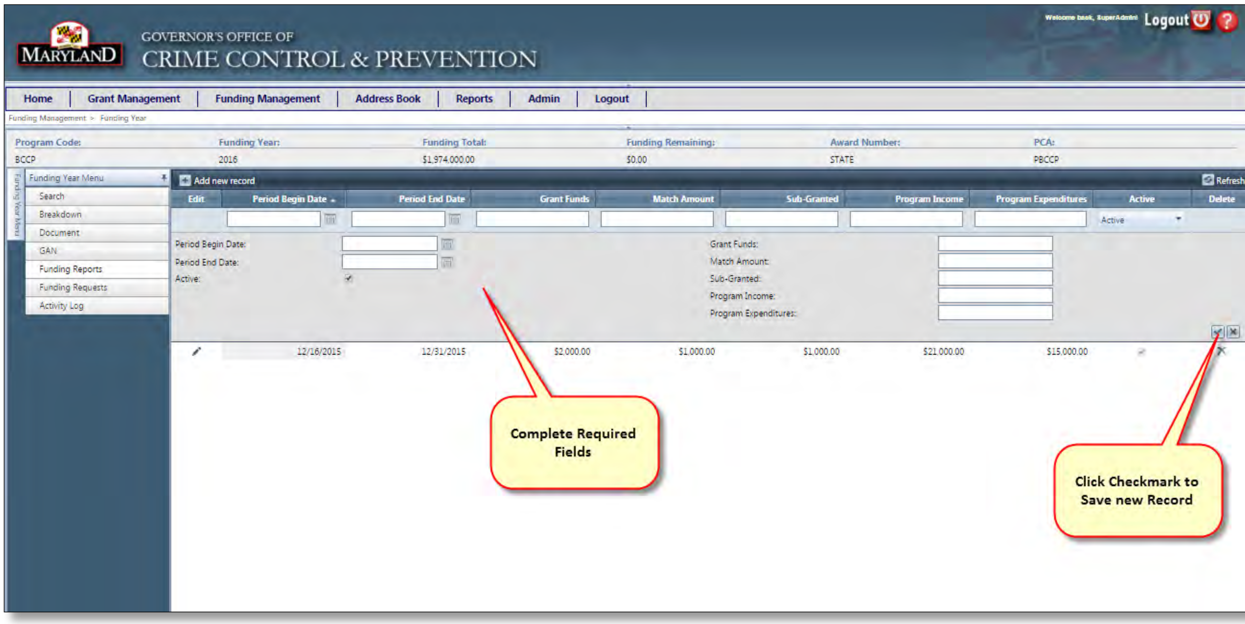


Figure 71 - Add New Funding Report Record - Data Entry Screen

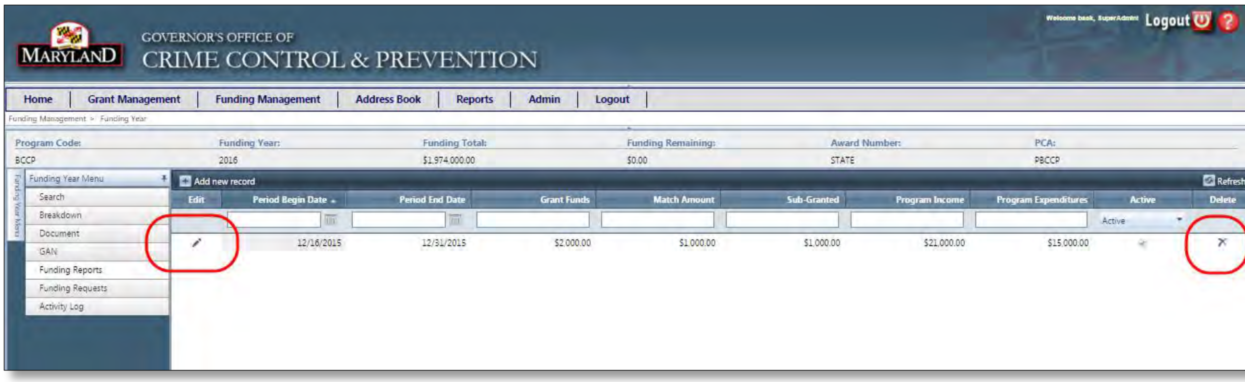
3. Complete each field in the data entry screen for the new FUNDING REPORT record as follows:

FUNDING REPORT "ADD NEW RECORD" FIELDS	
Period Begin Date	Begin date of financial reporting period.
Period End Date	End date of financial reporting period.
Active	This field displays whether this Report is **Active** or **Inactive**.
Grant Funds	Amount of grant funds expended this period.
Match Amount	Amount of match funds reported this period.
Program Income	Amount of program income earned during this period.
Program Expenditures	Amount of program income expended during this period.
Checkmark Button	Click to save new funding report record.
x Button	Click the X icon in this field to cancel adding new funding report record.

4. Click the Checkmark button located in the lower right hand corner of the Data Entry screen to save the new Funding Report record.

6.3.1.5.1 Editing or Deleting a Funding Report Record

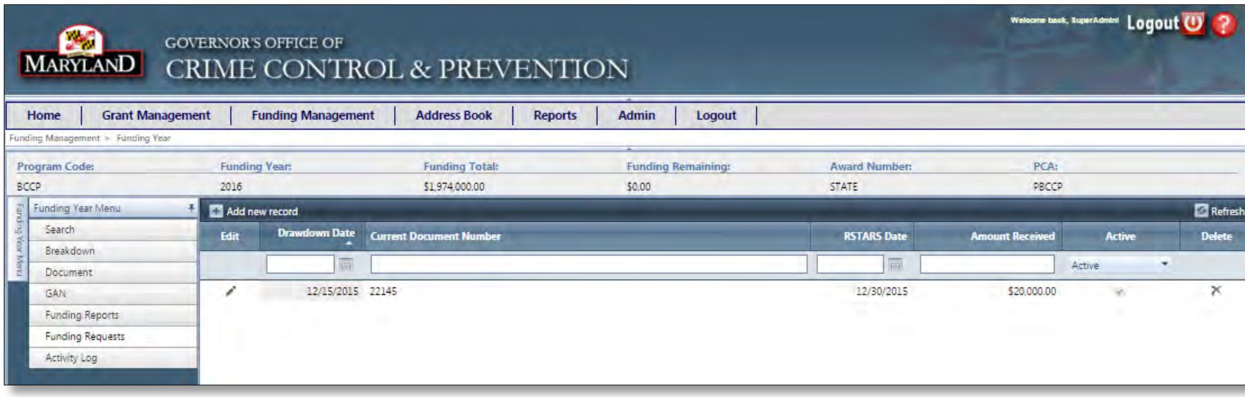
- To delete a Funding Report record, click the X icon in the Delete column of the record you wish to delete.
- To edit a Funding Report record, click the Pencil icon in the Edit column of the record you wish to edit.



6.3.1.6 Add a Funding Request to a Funding Year

1. Click on **Funding Request** in the Funding Year Menu.

Figure 72 – Access Funding Request from Funding Year Menu



Any existing Funding Request records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

FUNDING REQUEST RECORD DISPLAY FIELDS	
Drawdown Date	Date funds were drawn down from Federal Government.
Current Document Number	FMIS Identification Number.
RSTARS Date	Date funds were processed in FMIS.
Amount Received	Amount received by the Comptroller in relation to this drawdown.
Active	This field displays whether this Request is **Active** or **Inactive**.
Edit	Click the pencil icon in this field to edit high-level information associated with this Request.
Delete	Click the X icon in this field to delete this Request record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

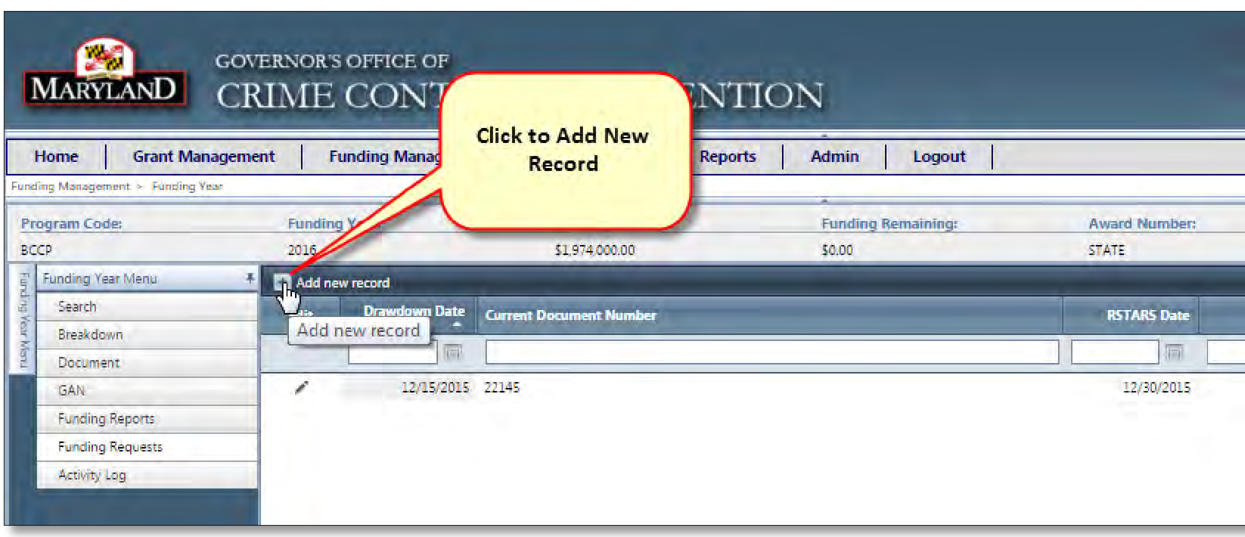


Figure 73 - Add New Funding Report Record

Upon clicking *Add new record*, the data entry screen appears:

Figure 74 - Add New Funding Request Record - Data Entry Screen

3. Complete each field in the data entry screen for the new FUNDING REQUEST record as follows:

FUNDING REQUEST "ADD NEW RECORD" FIELDS	
Drawdown Date	Date funds were drawn down from Federal Government.
Current Document Number	FMIS Identification Number.
RSTARS Date	Date funds were processed in FMIS.
Amount Received	Amount received by the Comptroller in relation to this drawdown.
Notes	Add any additional information related to the drawdown record.
Active	This field displays whether this Request is **Active** or **Inactive**.
Edit	Click the pencil icon in this field to edit high-level information associated with this Request.
Delete	Click the X icon in this field to cancel adding this Request record.

4. Click the Checkmark button located in the lower right hand corner of the Data Entry screen to save the new Funding Request record.

6.3.1.6.1 Editing or Deleting a Funding Request Record

- To delete a Funding Request record, click the X icon in the Delete column of the record you wish to delete.
- To edit a Funding Request record, click the Pencil icon in the Edit column of the record you wish to edit.

6.3.1.7 *Add an Activity Log entry to a Funding Year*

1. Click the Activity Log tab to highlight it.

Figure 75 – Access Activity Log from Funding Year Menu

Any existing Activity Log records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

ACTIVITY LOG RECORD DISPLAY FIELDS	
Classification	This field displays the classification for an activity log record – **Internal** or **External**.
Activity Type	This field describes the nature of the activity log record – Types include **Info Requested**, **Info Received**, **Sent Non-Funding**, **Correspondence**, **Phone Conversation**, **Site Visit**, **Application Notes**, **Meeting Note**, **Other**, **Email**, **Award Note**, **Close Out**, and **GAN**
Subject	This field displays the subject that was entered when the record was created.
Notes	This field displays the free-form text notes that were entered when the record was created.

GOCCP Contact	This field displays the GOCCP contact that was selected when the record was created.
Contact	Enter the name of the external contact (if applicable).
Activity Date	This field displays the date the record was created.
Follow-Up Date	This field displays the follow-up date that was assigned when the record was created, if applicable.
Follow-Up	This field displays a checkmark in the box if the log entry was followed-up upon.
Edit	Click the pencil icon in this field to edit details of this activity log record.
Reply	Click the green plus sign icon in this field to create a **New Activity Log** record that will be tied to the log in this record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

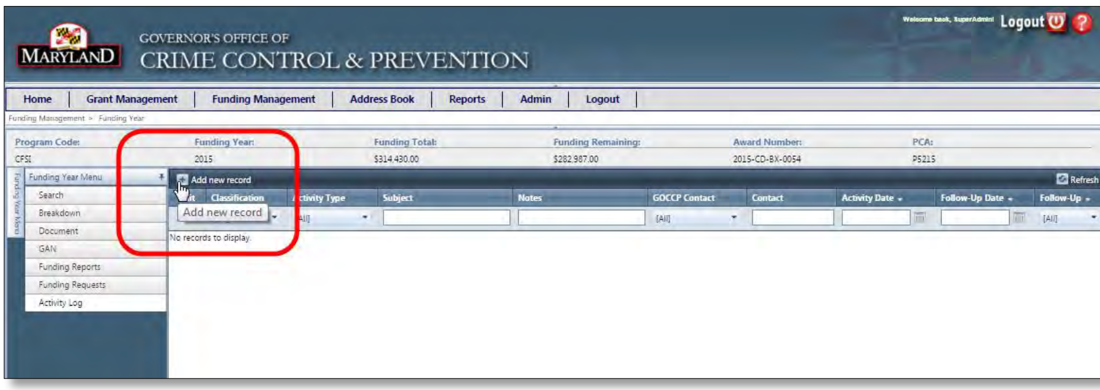


Figure 76 - Add New Activity Log Record

Upon clicking *Add new record*, the data entry screen appears:

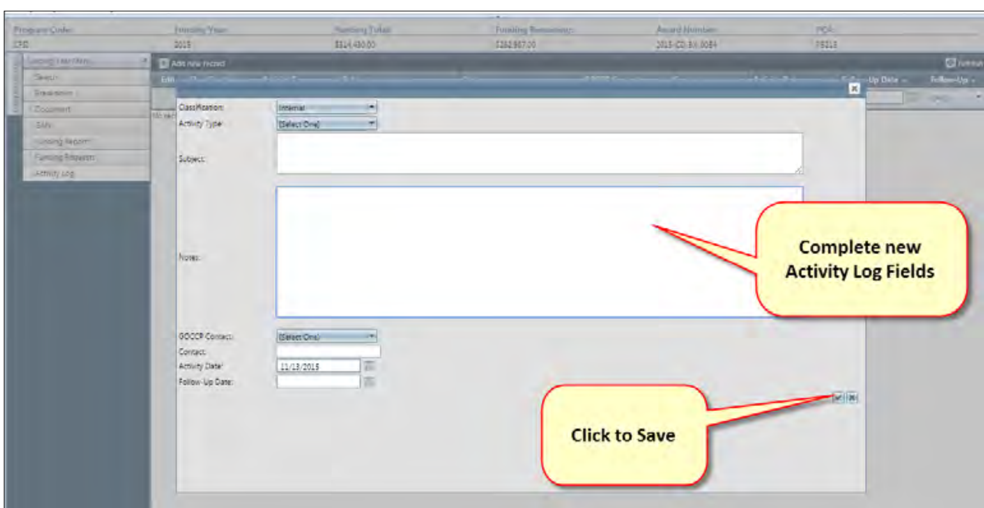


Figure 77 - Add New Activity Log Record - Data Entry Screen

3. Complete each field in the initial data entry screen for the new Activity Log record as follows:

ACTIVITY LOG TAB – "ADD NEW RECORD" FIELDS	
Classification	Click the dropdown list and select either **Internal** or **External**.
Activity Type	Click the dropdown list and select one of the following Activity Types: **Info Requested**, **Info Received**, **Sent Non-Funding**, **Correspondence**, **Phone Conversation**, **Site Visit**, **Application**

	Notes, **Meeting Note**, **Other**, **Email**, **Award Note**, **Close Out**, and **GAN**.
GOCCP Contact	Click the dropdown list and select the GOCCP contact relevant to this record.
Contact	Enter your name here as the creator of the activity log record.
Activity Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Follow-Up Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Subject	Enter a brief description of the subject of this activity log entry into this field.
Notes	Enter any relevant notes regarding the activity into this field.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Activity Log record.

6.3.2 Admin Allowances (Access based on permission)

Admin Allowances are a new entity that function like an application that admin funding source breakdown funds can be applied to. They have a budget and their funds are gradually expended (like a financial report on a grant).

To create an Admin Allowance for a funding year:

1. Locate and expand the funding code / funding year for which you want to add an Admin Allowance:

Figure 78 – Expand Funding Code / Funding Year Record

2. Click on the Admin Allowances tab:

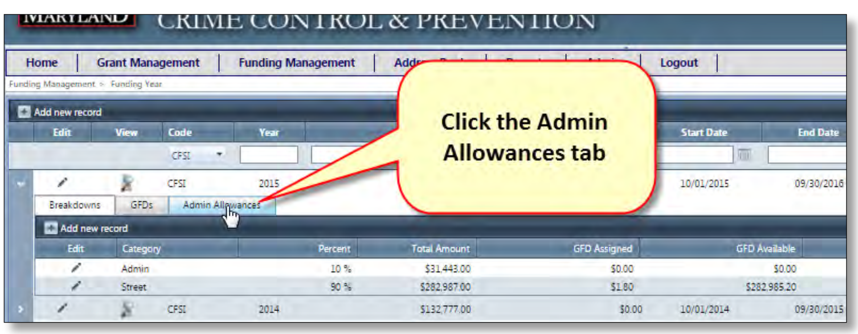


Figure 79 – Click Admin Allowances Tab

3. The empty fields associated with an Admin Allowance are shown at the top. Any admin allowances already added are shown directly below them. To add a new Admin Allowance, click on the Add new record button:

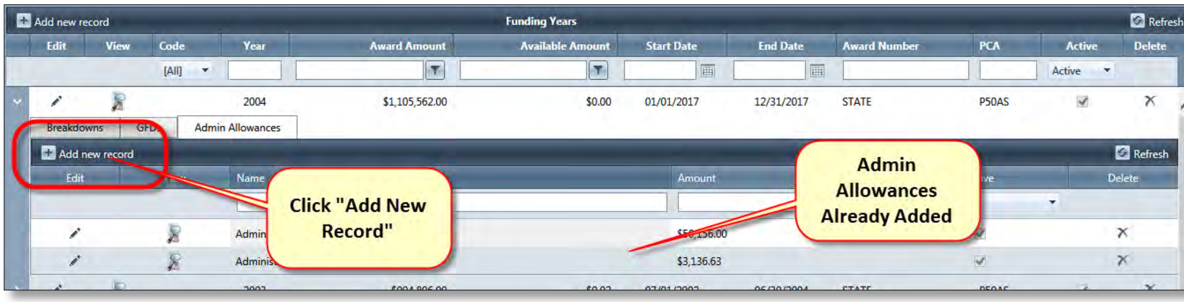


Figure 80 – Click Add New Record

4. Enter the Name and Amount of the Admin Allowance in the appropriate fields. To make the Admin Allowance active, click the checkbox under the Active column. When you are finished, click the Checkmark icon on the right side to save your record.

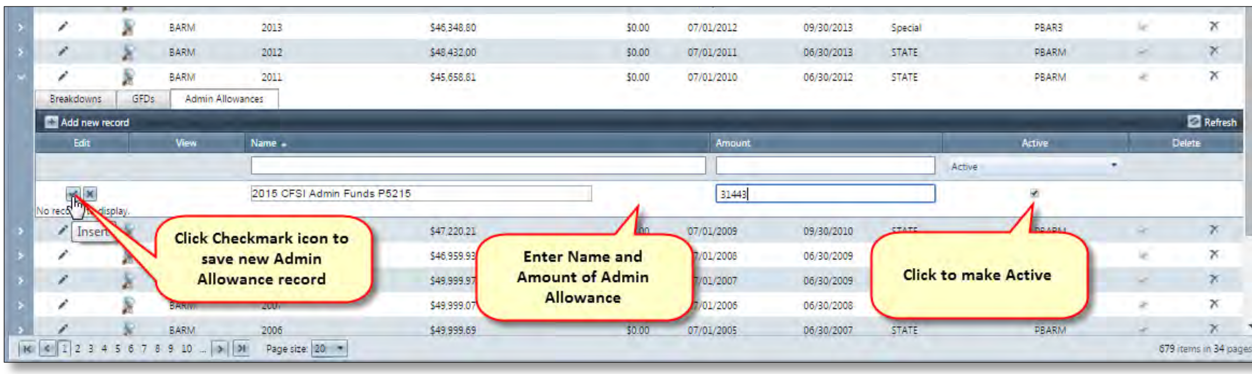


Figure 81 – Enter Name & Amount of Allowance and Make Active

5. The new Admin Allowance record appears under the funding code / funding year under which it was created:

Figure 82 – New Admin Allowance Record Appears

6.3.2.1 Managing Admin Allowances

Because you can perform most activities of a Funding Year to an Admin Allowance, the Admin Allowance has its own menu. To access the Admin Allowances menu:

1. Expand the funding year which contains the Admin Allowance:

Figure 83– Expand Funding Year which contains the Admin Allowance

2. Click on the Admin Allowances tab:

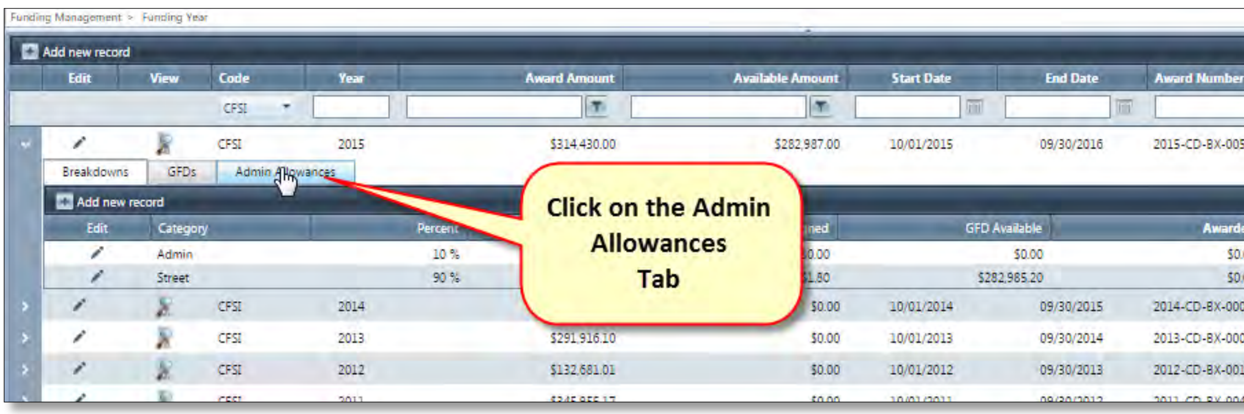


Figure 84– Click on Admin Allowances Tab

3. Click on the Magnifying Glass icon in the Admin Allowance row you wish to see:

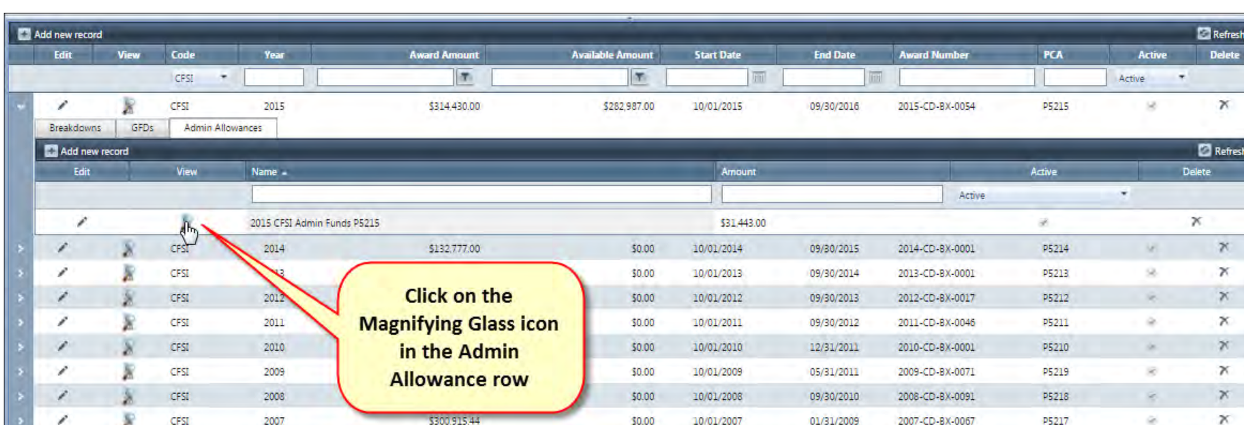


Figure 85– Click on Magnifying Glass Icon in Admin Allowance Row

4. The Admin Allowance you selected is shown on the screen with its own menu – the **Admin Allowance Menu**:

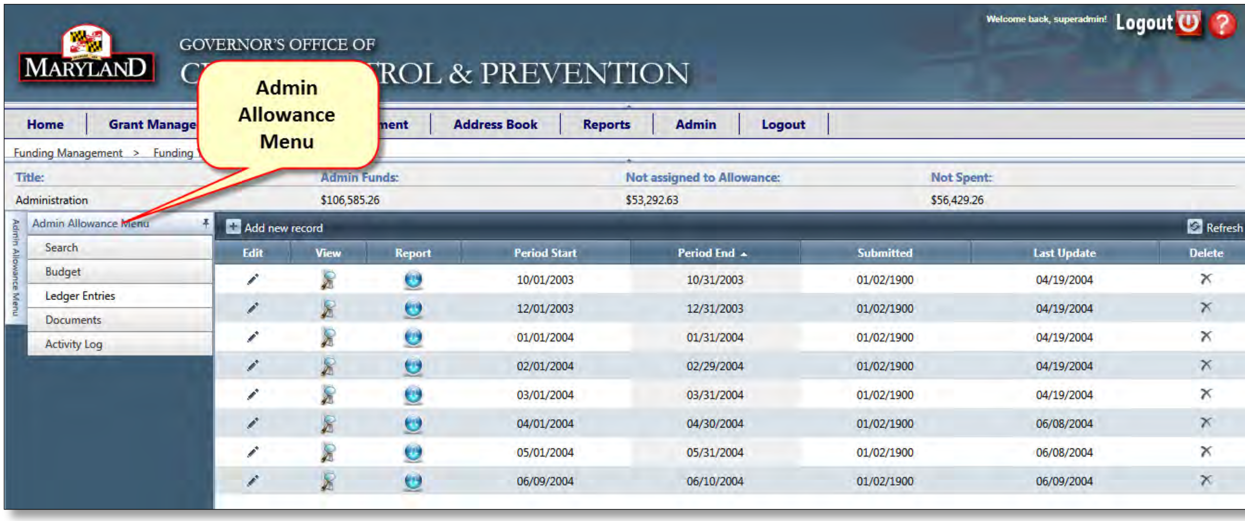


Figure 86– Click on Magnifying Glass Icon in Admin Allowance Row

5. From here, you can create budget and ledger entries, add documents and add logs of your activity on this Admin Allowance.

6.3.2.2 Add Budget Justifications

1. Click on **Budget** in the **Admin Allowance Menu**.

Figure 87– Click on Budget in the Admin Allowance Menu

2. Click the arrow icon to the left of the Budget Category you wish to expand.

Figure 88– Expand Budget Category for which you want to add a Justification

3. Click on **Add** under the **Just** column next to the Yield icon.

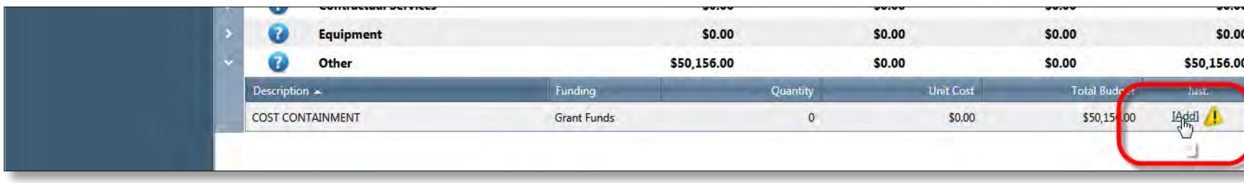


Figure 89– Click on Add in the Just column for the line item you wish to add a justification

4. Enter the Justification in the text box, then click the **Save** button.

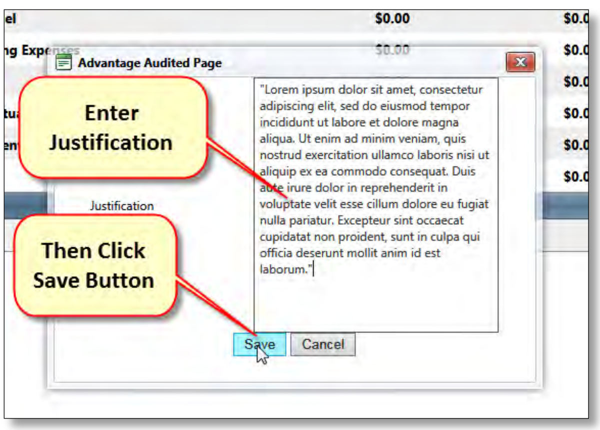


Figure 90– Enter Justification then Click Save Button

5. Once the Justification has been entered, the text under **Just** for that line item changes to **View/Edit**, indicating that a justification has been entered.

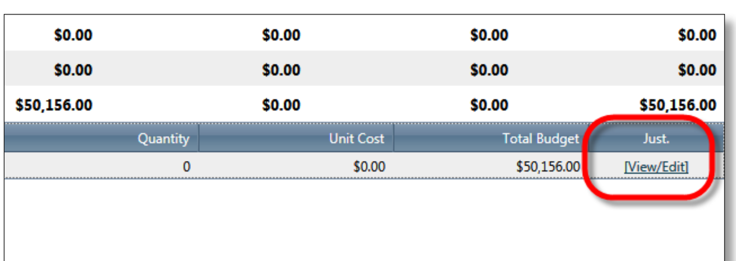


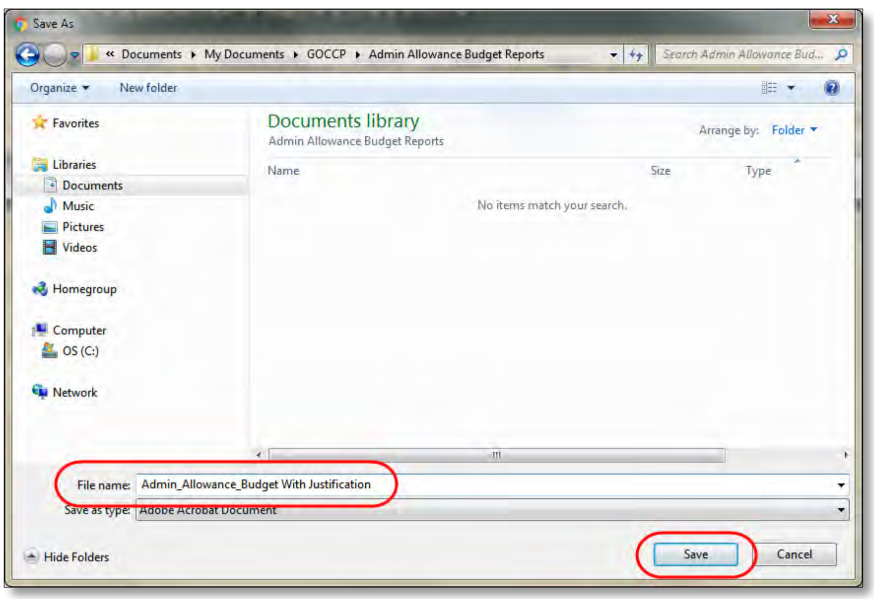
Figure 91– Text under **Just** column changes to View/Edit, indicating presence of a Justification.

6.3.2.2.1 Printing a Budget With and Without a Budget Justification

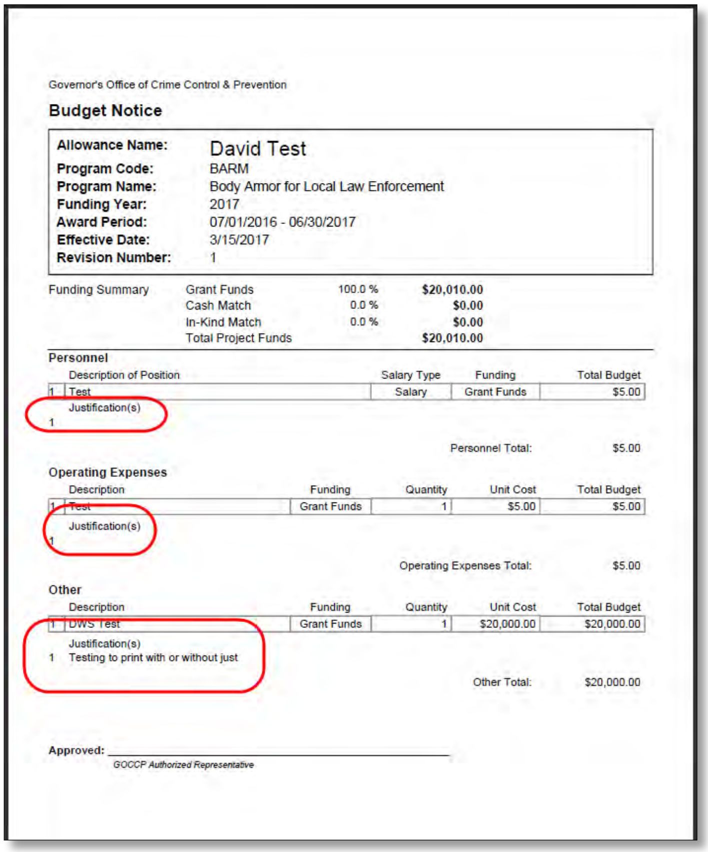
From the Admin Allowance Menu you can print a copy of your budget with or without the justification. To print *with* justification:

1. Click on Budget, then in the top right section click on **Print with Justification.**

2. Enter a name in the **File name** field, then click the **Save** button.



3. The file will be saved and opened in Adobe Acrobat Viewer. Any justifications will be displayed on the report.



Governor's Office of Crime Control & Prevention

Budget Notice

Allowance Name:	David Test
Program Code:	BARM
Program Name:	Body Armor for Local Law Enforcement
Funding Year:	2017
Award Period:	07/01/2016 - 06/30/2017
Effective Date:	3/15/2017
Revision Number:	1

Funding Summary			
	Grant Funds	100.0 %	$20,010.00
	Cash Match	0.0 %	$0.00
	In-Kind Match	0.0 %	$0.00
	Total Project Funds		$20,010.00

Personnel

	Description of Position	Salary Type	Funding	Total Budget
1	Test	Salary	Grant Funds	$5.00

Justification(s)
1

Personnel Total: $5.00

Operating Expenses

	Description	Funding	Quantity	Unit Cost	Total Budget
1	Test	Grant Funds	1	$5.00	$5.00

Justification(s)
1

Operating Expenses Total: $5.00

Other

	Description	Funding	Quantity	Unit Cost	Total Budget
1	DWS Test	Grant Funds	1	$20,000.00	$20,000.00

Justification(s)
1 Testing to print with or without just

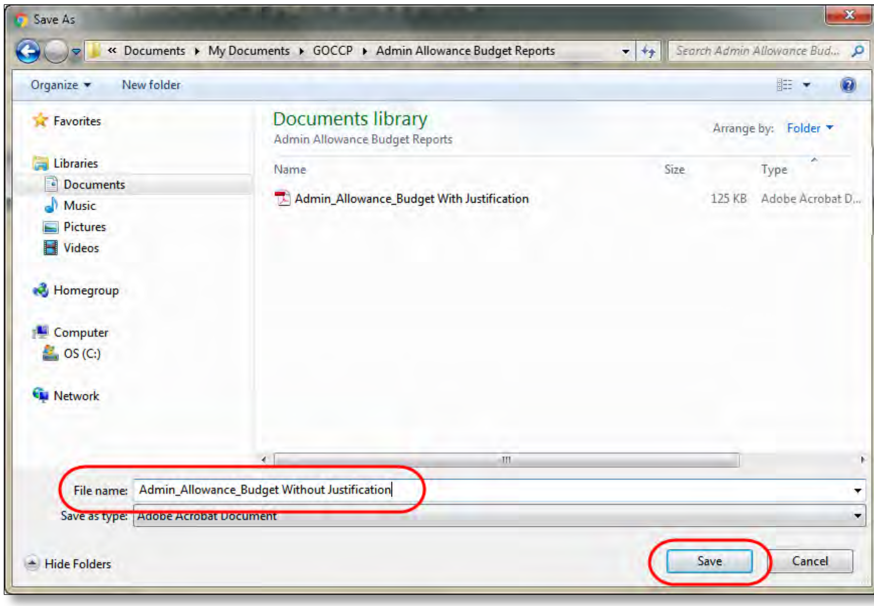
Other Total: $20,000.00

Approved: ______________________
GOCCP Authorized Representative

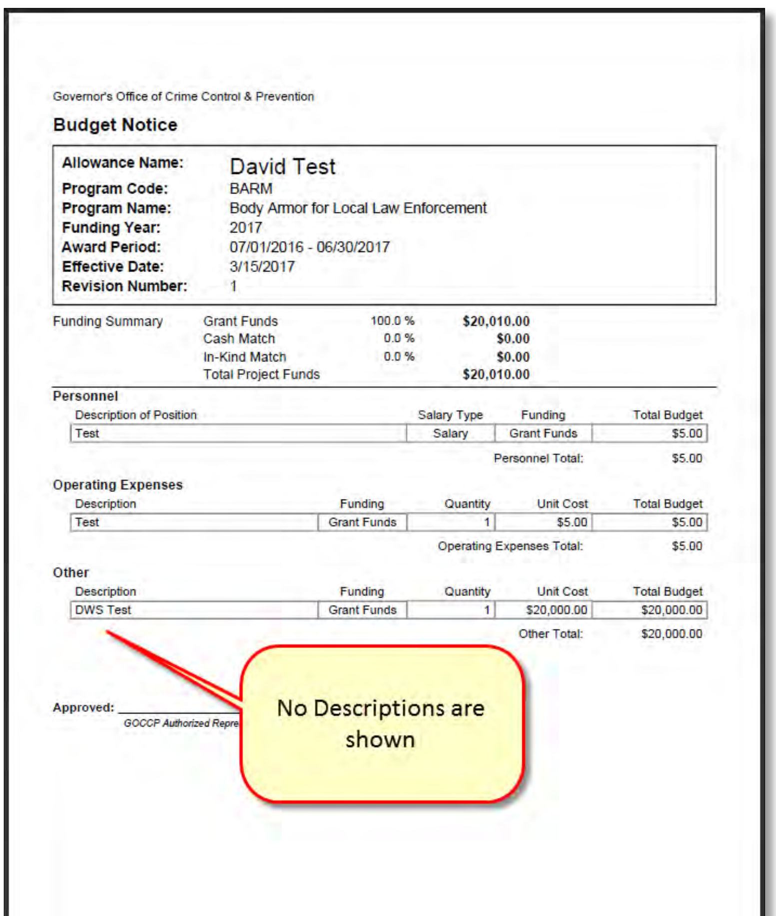
To print *without* justification:

1. Click on Budget, then in the top right section click on **Print.**

2. Enter a name in the **File name** field, then click the **Save** button.



3. The file will be saved and opened in Adobe Acrobat Viewer. Any justifications will **not** be displayed on the report.



Governor's Office of Crime Control & Prevention

Budget Notice

Allowance Name:	David Test
Program Code:	BARM
Program Name:	Body Armor for Local Law Enforcement
Funding Year:	2017
Award Period:	07/01/2016 - 06/30/2017
Effective Date:	3/15/2017
Revision Number:	1

Funding Summary			
	Grant Funds	100.0 %	**$20,010.00**
	Cash Match	0.0 %	**$0.00**
	In-Kind Match	0.0 %	**$0.00**
	Total Project Funds		**$20,010.00**

Personnel

Description of Position	Salary Type	Funding	Total Budget
Test	Salary	Grant Funds	$5.00
		Personnel Total:	$5.00

Operating Expenses

Description	Funding	Quantity	Unit Cost	Total Budget
Test	Grant Funds	1	$5.00	$5.00
			Operating Expenses Total:	$5.00

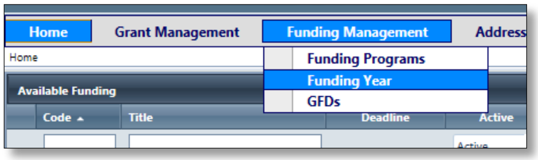
Other

Description	Funding	Quantity	Unit Cost	Total Budget
DWS Test	Grant Funds	1	$20,000.00	$20,000.00
			Other Total:	$20,000.00

Approved: ______
GOCCP Authorized Repre

6.3.3 View Funding Years

1. From your Home screen, select **Funding Year** from the Funding Management menu.



2. The Funding Year page displays all Funding Year records, each uniquely identified by the combination of the Funding Program and Year. If the life of a Funding Program spans several years, there will be one record for each year that program has been funded. Refer to the table below for a description of the column headings for each Funding Year record.

Figure 92 - Funding Year Main Page

FUNDING YEAR TOP-LEVEL SCREEN DISPLAY FIELDS	
Edit	Click on the pencil icon in this column to edit an existing Funding Year record (refer to the procedure ***Edit a Funding Year*** later in this section).
View	Click on the magnifying glass icon in this column to enter the Funding Year Menu and Data Entry Screen for an existing Funding Year record.
Code	This field displays the system code that uniquely identifies a Funding Program in GMS, which is set up and maintained in the Funding Management → Funding Programs menu. For example, **BCCP** is the code for the **Baltimore City Community Policing** Funding Program.
Year	This field displays the year that GOCCP has received dollars for the Funding Program in this record. As shown with *example data* in the figure above, the BCCP Funding Program has been funded for nine years so far (2005 – 2013) so there are nine Funding Year records, one for each program+year (**BCCP+2005**, **BCCP+2006**, etc.).
Award Amount	This field displays the total amount that GOCCP has received for the funding program and the year defined in this Funding Year record.
Available Amount	This field displays the **Award Amount** of this Funding Year record minus: 1) The amount already

	awarded to sub-recipients of the GFD based on this funding year and 2) The amount reserved for administration by GOCCP.
Start Date	This field displays the first day that funding will be available for this Funding Year and associated GFD.
End Date	This field displays the last day that funding will be available for this Funding Year and associated GFD.
Award Number	This field displays a GOCCP-assigned Award Number which is tied to the Funding Program for this Funding Year record. It is a free-form text field, example values are **STATE** for a state funding program, or **2011-JB-xx-xxxx** (funding year, funding program code + etc.)
PCA	This field displays the Program Cost Account (PCA) associated with this Funding Year record.
Active	This field indicates whether this Funding Year record is **Active** or **Inactive**.
Delete	Click on the X icon in this column to delete an existing Funding Year record (refer to the procedure ***Delete a Funding Year*** later in this section).

6.3.4 Edit a Funding Year

You can edit a Funding Year record at any time; you can edit the high-level details by clicking the pencil icon in the Edit column, or you can View, Edit, or Add Breakdown, Document, GAN, or Activity Log records for a Funding Year by clicking on the magnifying glass icon in the View column:

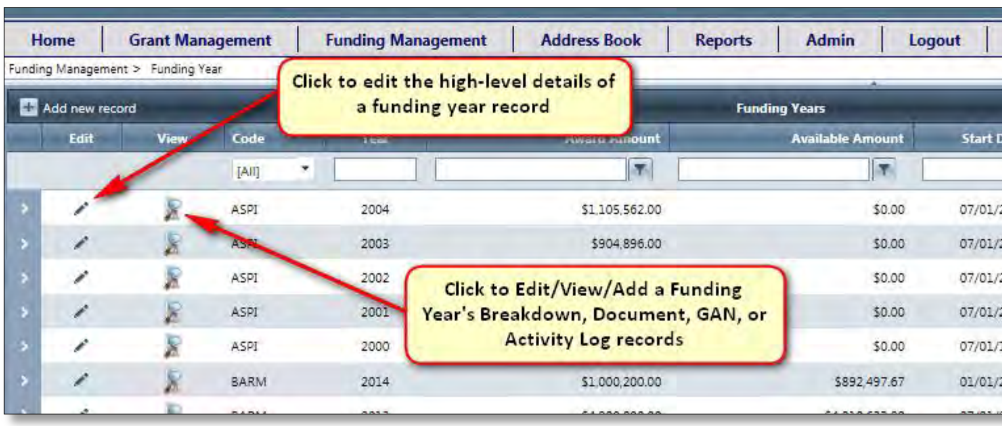
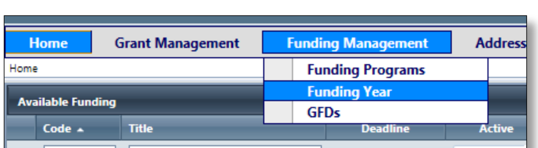


Figure 93 - Edit a Funding Year Record

To edit detail records (GAN/Breakdown/etc) for a Funding Year, refer to the instructions in the sections **Error! Reference source not found.**, **Error! Reference source not found.**, **Error! Reference source not nd.**, and **Error! Reference source not found.**. In the screens for each of these procedures, instead of clicking on Add New Record, locate the record you wish to edit and click on the pencil icon in the Edit column.

To edit the high-level details of a Funding Year record:

1. From your Home screen, select **Funding Year** from the Funding Management menu.



2. The Funding Year page displays all Funding Year records, each uniquely identified by the combination of the Funding Program and Year. If the life of a Funding Program spans several

years, there will be one record for each year that program has been funded. Refer to the table below for a description of the column headings for each Funding Year record.

Figure 94 - Funding Year Main Page

3. Click the pencil icon in the Edit column of the record you wish to edit.

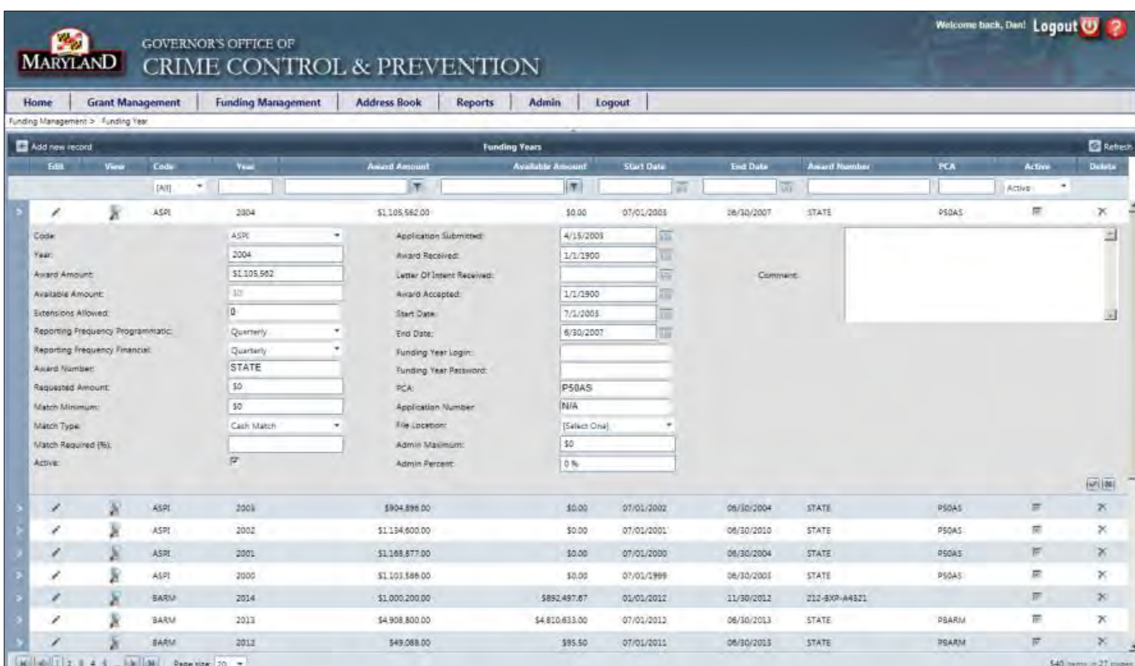


Figure 95 - Edit a Funding Year

4. Make changes to any of the information in data entry screen fields for the Funding Year as follows:

FUNDING YEAR – "EDIT" FIELDS	
Code	Dropdown List: Select the code for the **Funding Program** that this Funding Year will be based upon.
Year	Type in the four-digit year that applies to this Funding Year record.
Award Amount	Type in the total amount that GOCCP has received for the funding program selected for this Funding Year record.
Available Amount	Display Only: This field displays the **Award Amount** of this Funding Year record minus: 1) The amount already awarded to sub-recipients of the GFD based on this funding year and 2) The amount reserved for administration by GOCCP.
Extensions Allowed	This is a free-form text field. Enter YES, NO, or a comment if required for this record.
Reporting Frequency Programmatic	Select the frequency with which sub-recipients will be required to perform **Programmatic** Reporting for awarded grants based on this Funding Year. The choices are **Monthly**, **Quarterly**, **Semi-Annually**, and **Annually**.
Reporting Frequency Financial	Select the frequency with which sub-recipients will be required to perform **Financial** Reporting for awarded grants based on this Funding Year. As with programmatic reporting, the choices are **Monthly**, **Quarterly**, **Semi-Annually**, and **Annually**.
Award Number	This is a free-form text field. Enter the GOCCP-assigned Award Number which is tied to the Funding Program for this Funding Year record.
Requested Amount	Enter the amount that GOCCP originally requested for this Funding Year record. This may or may not equal the **Award Amount** for this record.
Match Type	A sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food). Select the match type from the drop-down list: Select either **Cash Match**, **In-Kind Match**, or **Both**.
Match Minimum	Enter the dollar amount a sub-recipient must provide in matching funds for a grant based on this funding year. If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in the **Match Required (%)** field and the dollar amount will automatically be added in this field.
Match Required (%)	If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the **Match Minimum** field.
Active	Click the checkbox to make this Funding Year record **Active**.
Application Submitted	Enter the date the application for this Funding Year was submitted.
Award Received	Enter the date this Funding Year award was received.
Letter of Intent Received	Enter the date that the Letter of Intent for this Funding Year was received.
Award Accepted	Enter the date this Funding Year award was accepted.
Start Date	Enter the date of the first day that funding will be available for this Funding Year and associated GFD.
End Date	Enter the date of the last day that funding will be available for this Funding Year and associated GFD.
Funding Year Login	Enter the Login that GOCCP uses to access the system responsible for awarding funds for the Funding Program used in this Funding Year record.
Funding Year Password	Enter the Password associated with the **Funding Year Login** in this record.
PCA	Enter the Program Cost Account (PCA) associated with this Funding Year record. This is generally the four-digit Funding Program code associated with this Funding Year record preceded by a "P", for example **PATFP**.
Application Number	Enter the application number that the funding agency assigned to your application for funding year dollars for the Funding Program in this record.

File Location	Choose either "**Grant Manager's Room**", "**Archives A8**", "File Room 1" or "File Room 2" from the drop-down list to select the physical location of the file for this Funding Year record.
Admin Maximum	Enter the maximum portion (in dollars) of the **Award Amount** for this Funding Year that can be allocated to GOCCP for administrative purposes. If you do not have a dollar amount but rather a percentage, enter the percentage in the **Admin Percent** field in this record; doing so will automatically populate this field with the correct dollar amount.
Admin Percent	If the Admin Maximum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the **Admin Maximum** field.
Comment	This is a free-form text field. Enter any notes or comments regarding this funding year that you would want other users to see when they view or edit this Funding Year record.

5. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to update the Funding Year.

6.3.5 Delete a Funding Year

With proper system permission, you can delete a Funding Year by clicking on the X icon in the Funding Year row. After clicking the X, a "Delete this Funding Year?" confirmation message is displayed.

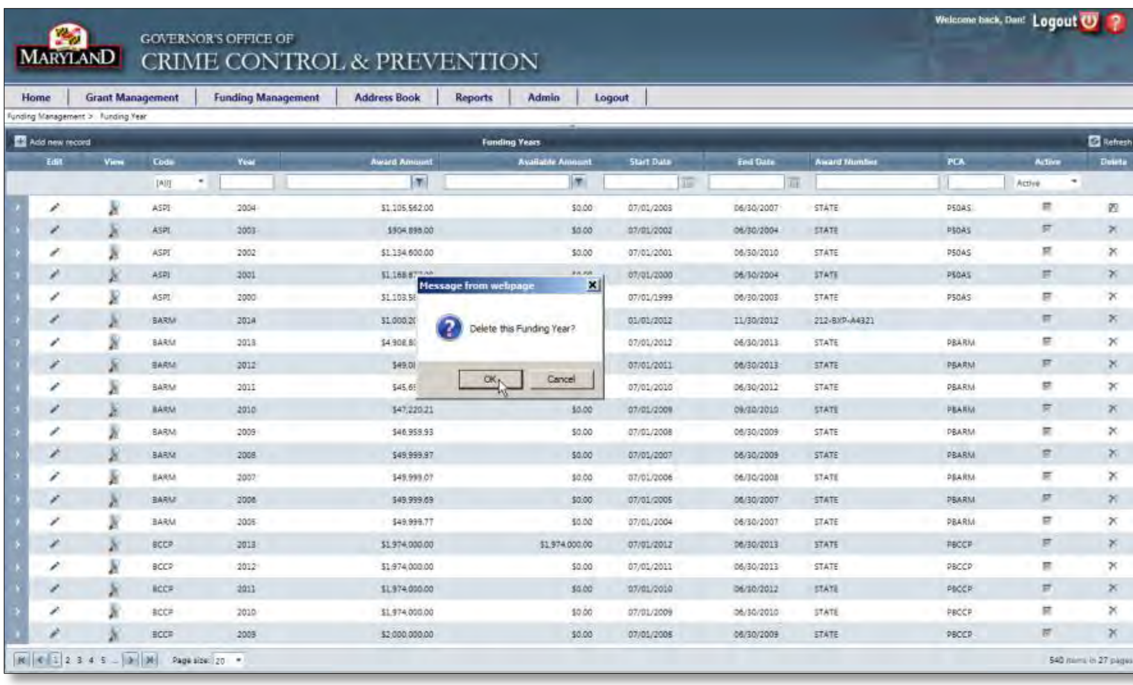


Figure 96 - Delete a Funding Year

- Click the OK button to delete the Funding Year.
- If you click the Cancel button, the record is not deleted and you are returned to the Funding Year list.

6.4 Grant Funds Distributions (GFD)

Grant Funds Distribution records appear in the Available Funding dashboard of all GMS users' Home Page. They are based on Funding Programs/Funding Years, and each has a NOFA document attached to it that is the printable, hardcopy guide to the available funding. After creating a Funding Source Breakdown based on funds allocated through a Funding Year, you can create a GFD that sub-recipients will use to apply for a grant.

This section provides instructions for viewing, creating, editing, and deleting GFDs.

6.4.1 Create a GFD

A GFD is created from a Funding Program & Funding Year. If you are creating a new GFD, be sure that the new Funding Program has already been created and finalized and has money allocated to it via a Funding Year.

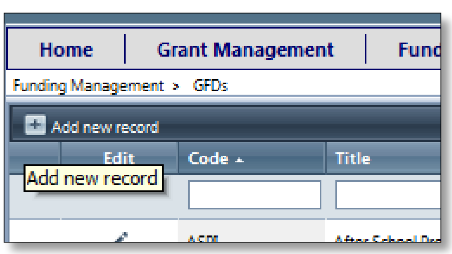
The first step in creating a new GFD is to add a new GFD record and provide high-level detail information. After that, you will edit the record and provide the following information:

- Funding (Allocate money to the GFD)
- Budget (Select budgetary items that sub-recipients will need to supply)
- Organizations (Designate specific organizations that can apply for grants based on the GFD. Note: if you do not designate organizations, all organizations can apply.
- Documents (Attach a NOFA and, optionally, other documents to the GFD)
- Activity Log (Optionally create activity log entries that detail correspondence or other items)

After you complete these tasks, you can Finalize the GFD and make it available. Instructions for performing each of these tasks are provided in the following sections.

6.4.1.1 Add a New GFD Record

1. From the GFD list, click on the *Add new record* link in the upper left hand corner of the Funding Year process area, above the column headers.



Upon clicking *Add new record*, the data entry screen appears:

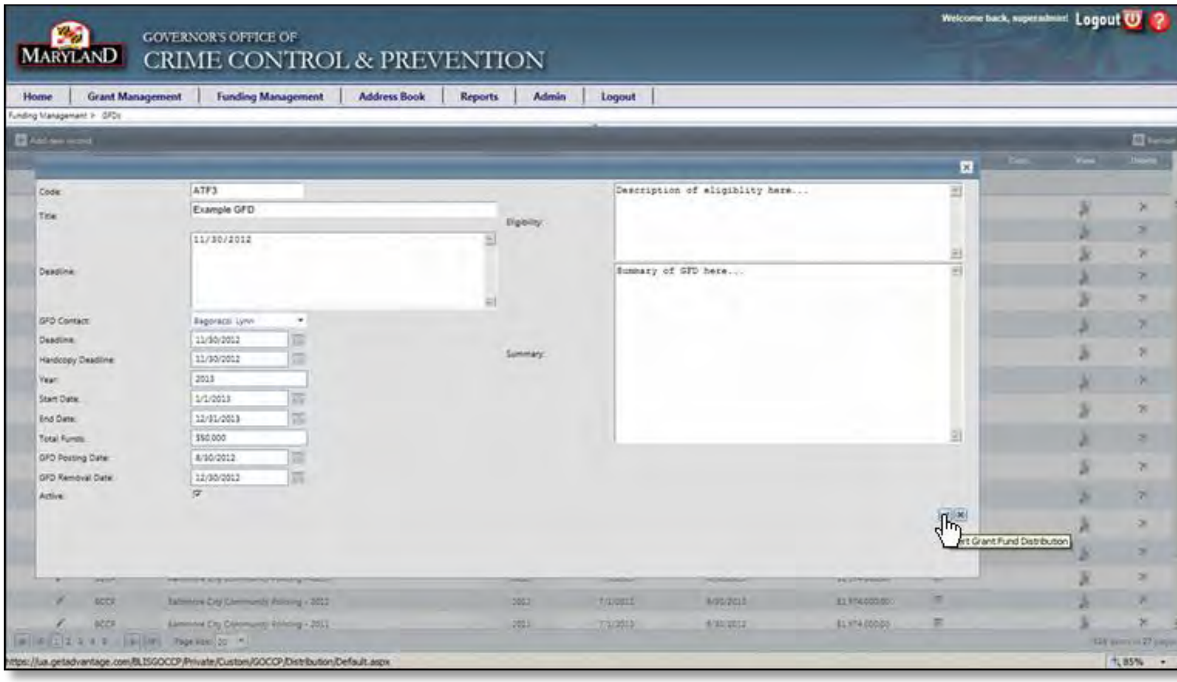


Figure 97 - Add New GFD - Data Entry Screen

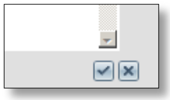
2. Complete each field in the initial data entry screen for the new GFD as follows:

GFD - "ADD NEW RECORD" FIELDS	
[1,2]Code	Enter the 4 to 9 Character NOFA code (usually the primary funding program).
[1,2]Title	Enter the **Funding Year** title that the GFD is based on.
[1]Deadline	Verbose description of deadlines (hardcopy and electronic dates/times). Free form text box.
[2]GFD Contact	Select the name of the GOCCP contact who is responsible for managing the GFD from the dropdown list.
[1,2]Deadline	Enter the date by which all grant applications based on this GFD must be submitted electronically.
[1,2]Hardcopy Deadline	Enter the date that GOCCP must receive hardcopies of grant applications by in order to be considered for awarding.
[1,2]Year	Enter a NOFA year (usually the same as the primary funding source's year).
[1]Start Date	Enter the date sub-awards would start.
[1]End Date	Enter the date sub-awards would end.
Total Funds	Enter the **Total Amount** of funding that will be available for sub-recipients to apply for grants against for the GFD. This is not visible to external users.
GFD Posting Date	Enter the date that the GFD will become available and be displayed in the Available Funding dashboard of the GMS home page.
GFD Removal Date	Enter the date that the GFD will be removed and no longer available.
[1]Active	Click to place a checkmark in the box and designate the GFD as **Active**.
[1]Eligibility	This is a free-form text box. Enter any special eligibility requirements that sub-recipients must be made aware of when applying for a grant based on the GFD.
[1]Summary	This is a free-form text box. Enter a brief summary of the GFD that users will see when they click on the View icon for a GFD in the Available Funding dashboard.

[1]Denotes fields which will be visible to external users

[2]Denotes fields which are required to save the initial GFD record

3. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the GFD.



Press the **X** to cancel – you will lose any information you entered for the new GFD if you cancel.

4. Upon saving the new record, you are returned to the GFD home screen and will see the new record in the list.

Figure 98 - View New GFD Record in List

Before you can finalize a new GFD and make it available for grant applications, you must allocate money, select budget items, attach a NOFA, and optionally, designate organizations that can see the GFD and add any activity log items.

To begin, locate the new GFD record in the list and click the View icon associated with it. The GFD Menu appears to the left of the screen, and the process area corresponding to the Funding menu item appears in the right pane of the screen as shown below:

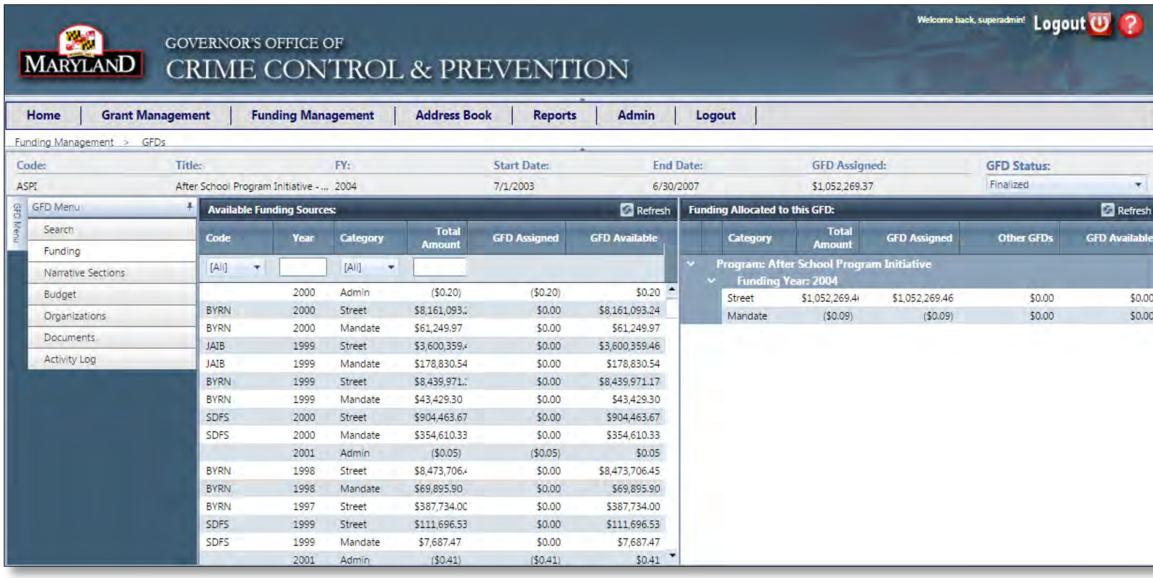


Figure 99 - GFD Menu and Process Area

6.4.1.2 Assign Funding to a GFD

1. After clicking on Funding in the GFD Menu, the process area is divided into two parts. The left panel provides a list of Available Funding Sources. The right panel is "Funding Allocated to this GFD". Select the funding source from the left panel by clicking on the item and holding the mouse button down.

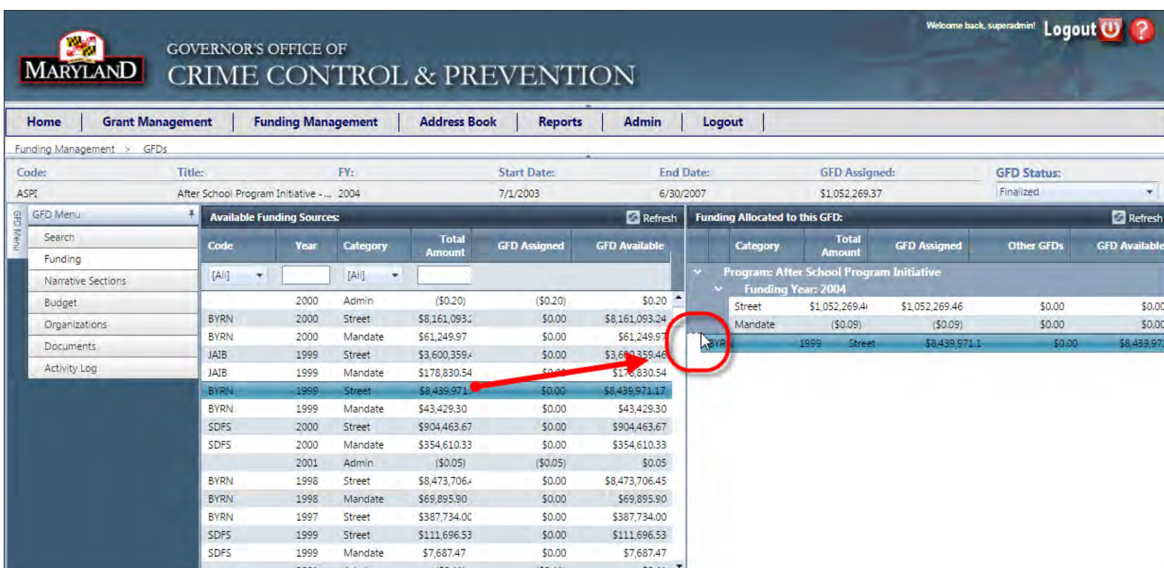


Figure 100 - GFD Menu -> Funding

2. Drag the funding source item over to the right panel and release the mouse button. The "Specify Amount" dialog box appears – enter the dollar amount of the funding source you wish to allocate to this GFD, then click the Save button.

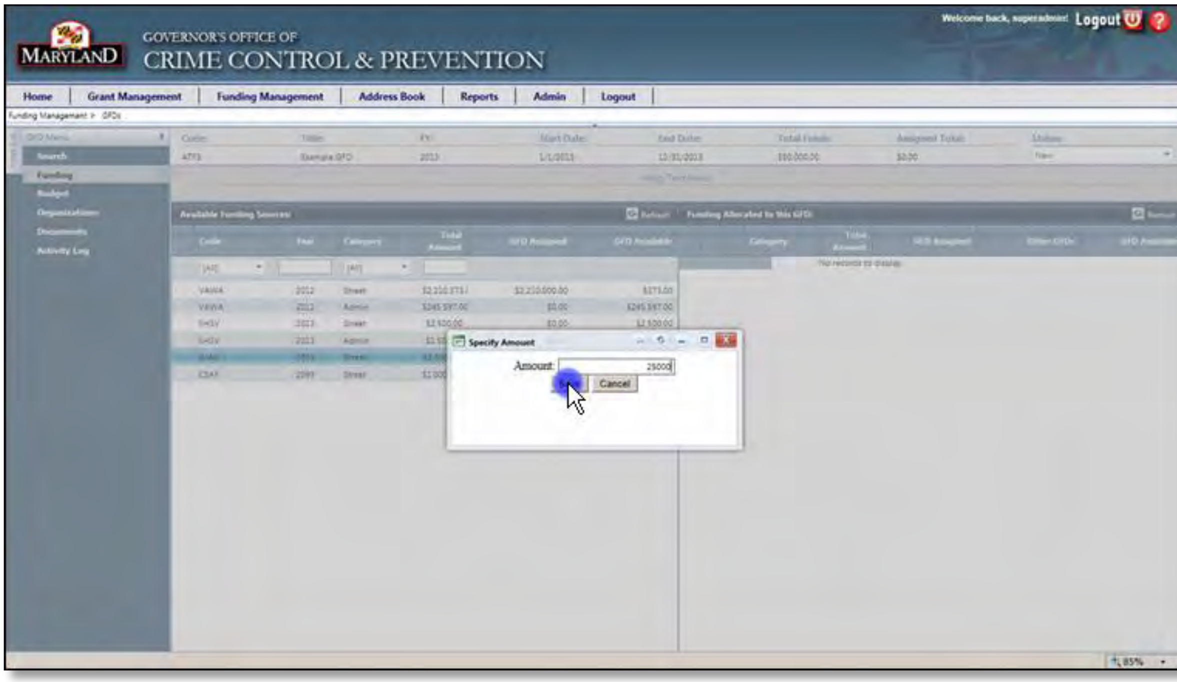


Figure 101 - Specify Amount of Allocation

3. Your selection and the amount you chose for that funding source now appears in the right panel as funding allocated to this GFD.

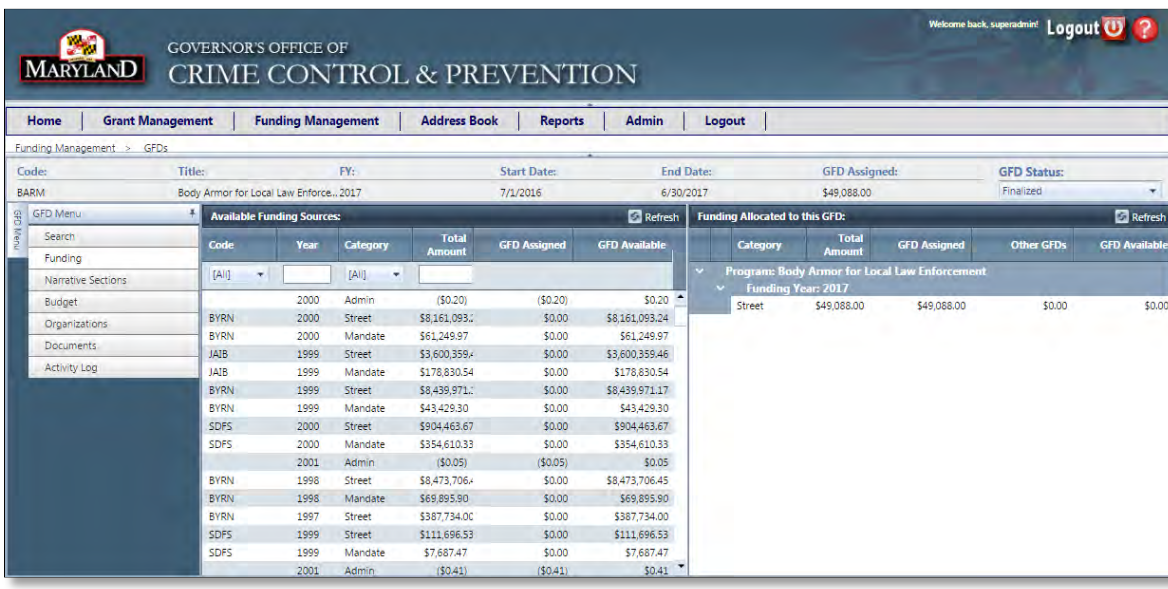


Figure 102 - Funding Successfully Allocated to GFD

- Because you can allocate multiple sources of funding for any given GFD, the funding records in the Funding Allocated to this GFD panel are grouped, first by Funding Program title, then by Funding Year:

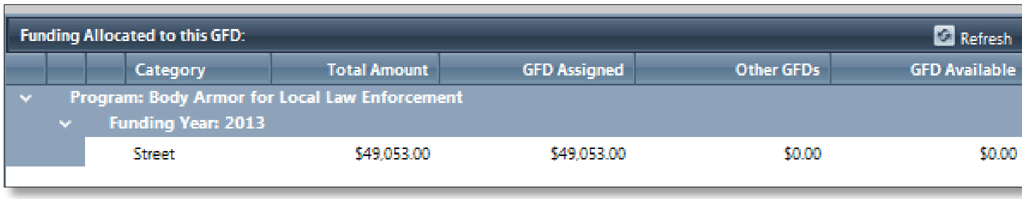


Figure 103 - Funding Allocated to a GFD - Groupings

- In this example, the Funding Program chosen is Body Armor for Local Law Enforcement. The Funding Year set up for that program and used for this GFD is 2013. If another Funding Year for that program is chosen to fund this GFD as well, that funding year would be displayed as another sub-grouping of the funding program. This holds true if several Funding Programs/Years are used to fund this GFD – each Funding Program will display as its own group.

4. Repeat the procedure if you want to allocate funds from another source to this GFD:

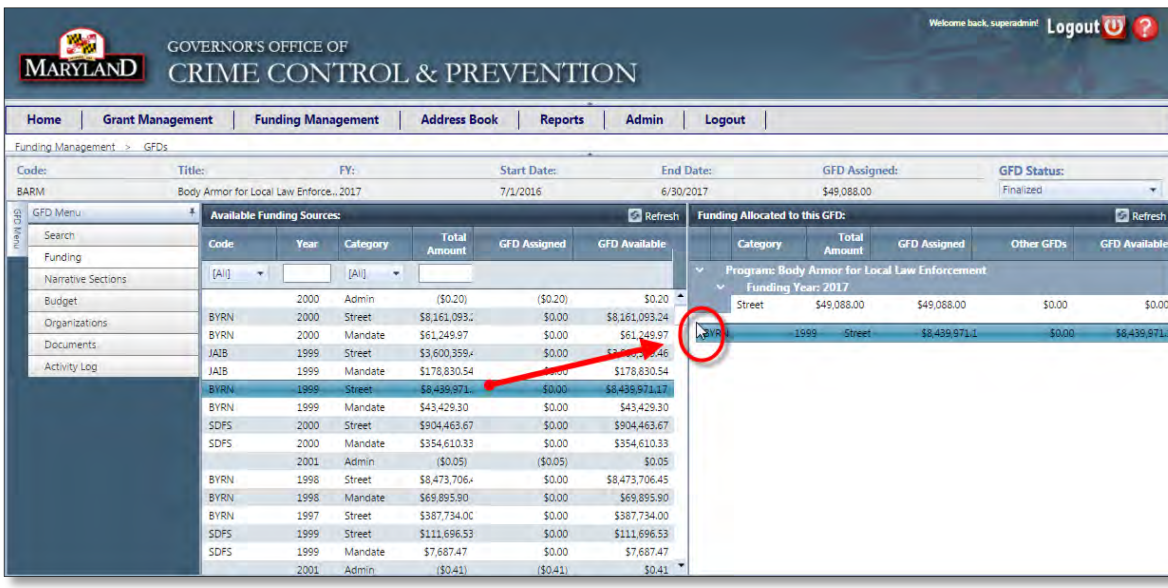


Figure 104 - Add an additional funding source

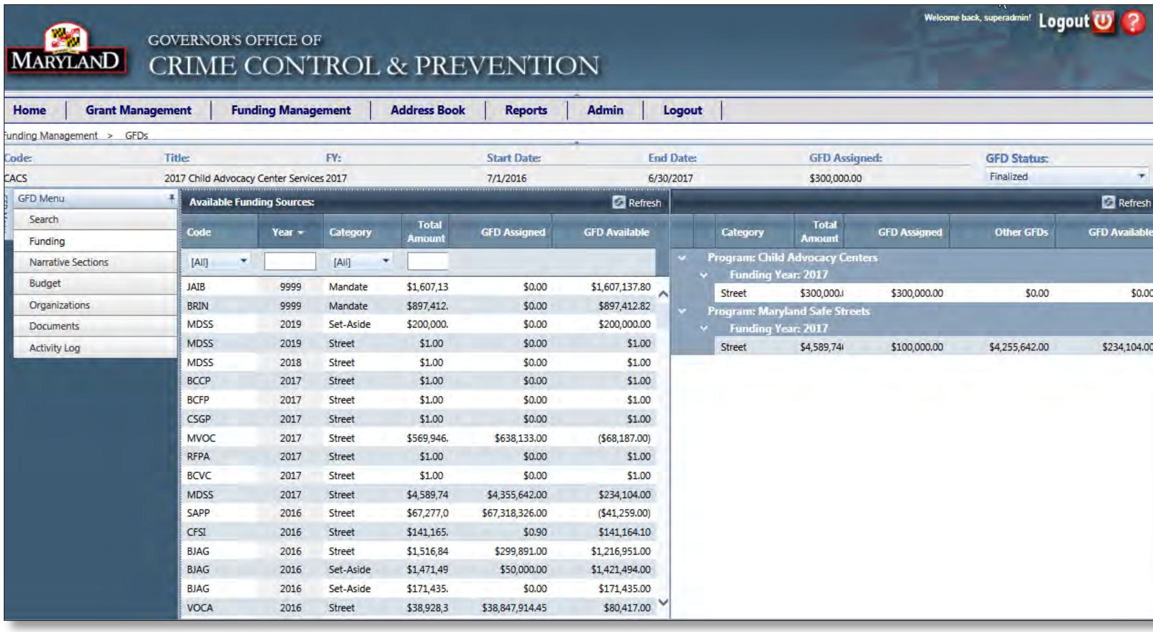


Figure 105 - Multiple Sources Allocated to a GFD

5. At any time you can drag a selected funding source back to the Available panel to remove it from the Allocated panel if you selected it in error. Simply click on the item in the Allocated panel and hold the mouse button, drag it back over to the Available panel and release the mouse button as shown below.

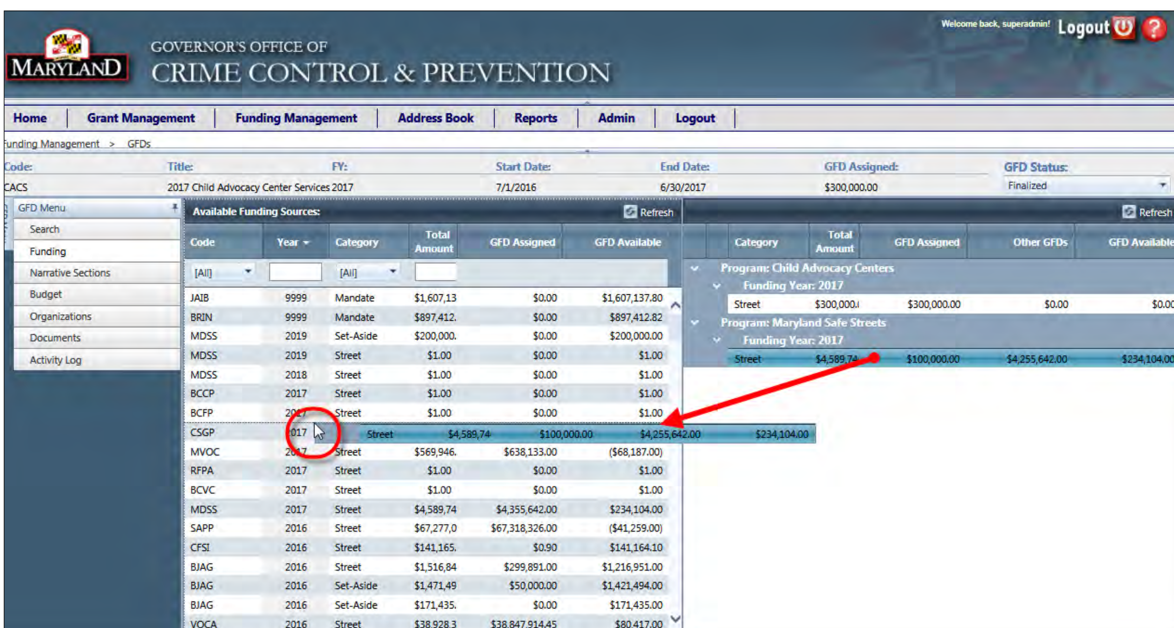


Figure 106 - Removing a Funding Source from the Allocated Panel

6. Allocating funding is persistent – changes are saved immediately.

6.4.1.3 Assign Narrative Sections to a GFD

1. Click the Magnifying Glass icon in the View column for the GFD you'd like to view.

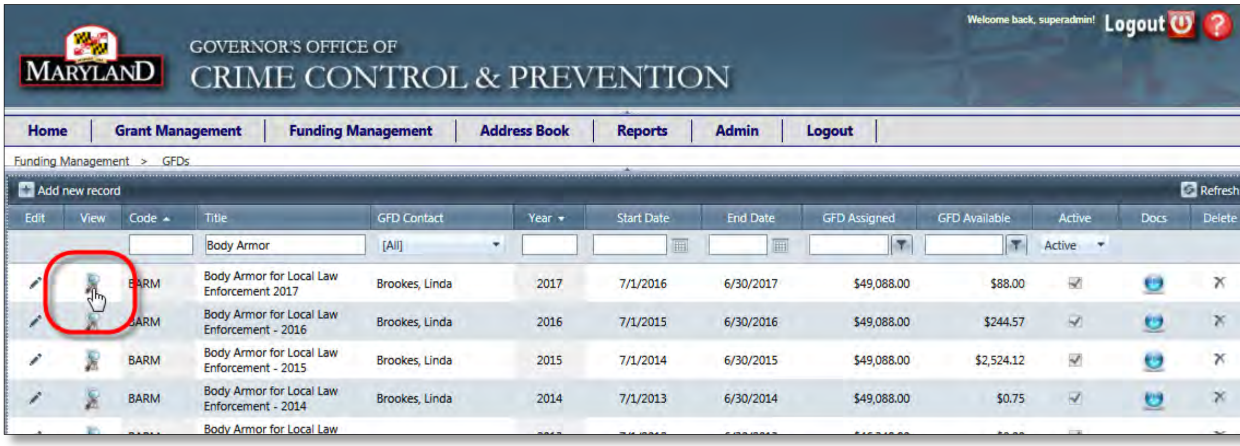


Figure 107 – Click Magnifying Glass to View a GFD

Click the **Narrative Sections** menu item in the **GFD Menu** to view available and assigned **Narrative Sections**.

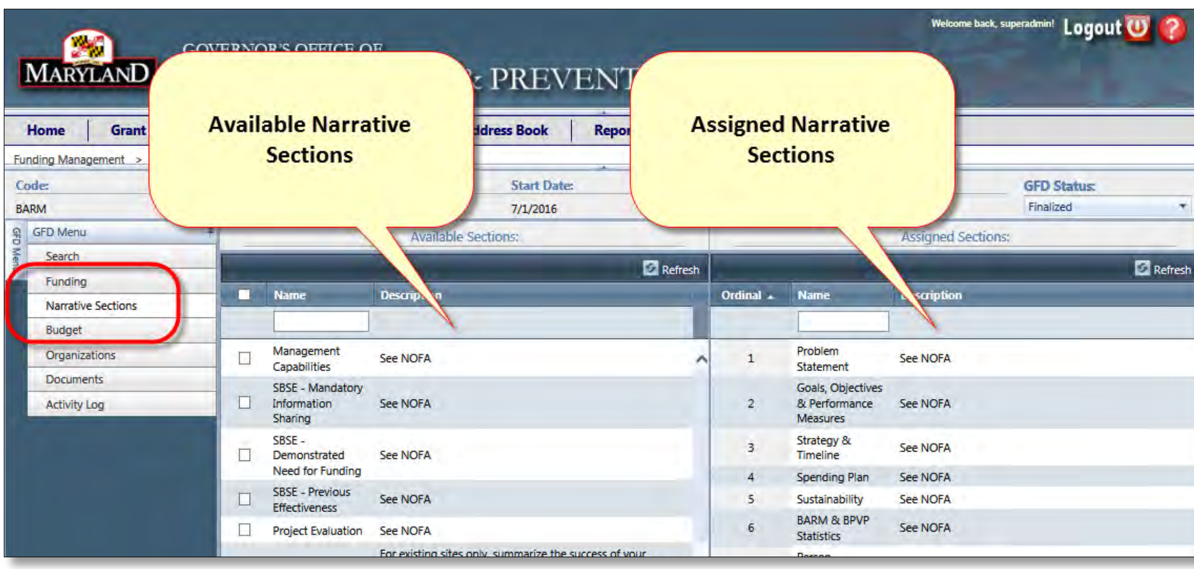


Figure 108 – Click Narrative Sections in the GFD Menu

a. In the Available Sections area is a complete list of existing Narrative Statements.
b. In the Assigned Narrative Sections area are Narrative Sections that have been assigned to the GFD you are currently working in.
c. Assigning an available Narrative Section to the assigned area means that anyone applying for a grant on which that GFD is based must complete that Narrative Statement before being able to submit their grant.

2. To assign a Narrative Section to a GFD, first locate the Narrative Section you wish to add. When you find it, place a check in the checkbox beside the name of the Section.

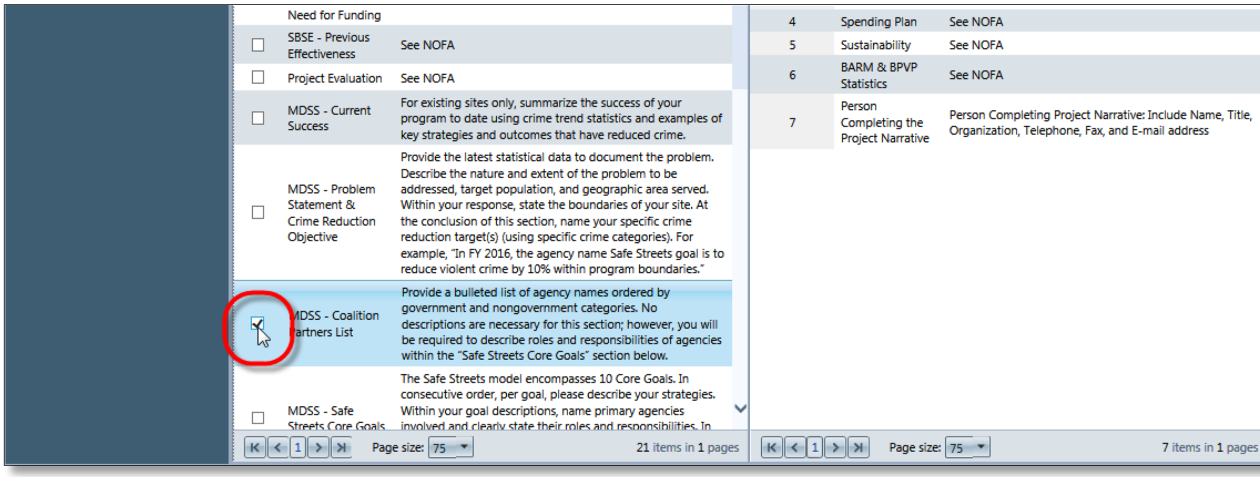


Figure 109 – Place a check in the checkbox beside the Available Narrative Section

3. Once the section is checked, click and hold down anywhere within the checked narrative section. Then drag it over to the Assigned Narrative Section area below any existing sections and release the checked section.

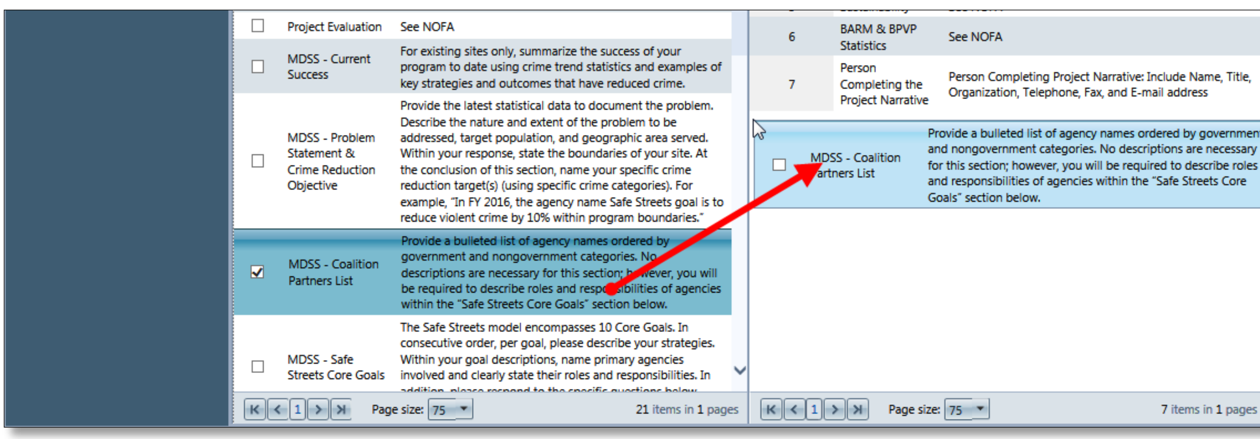
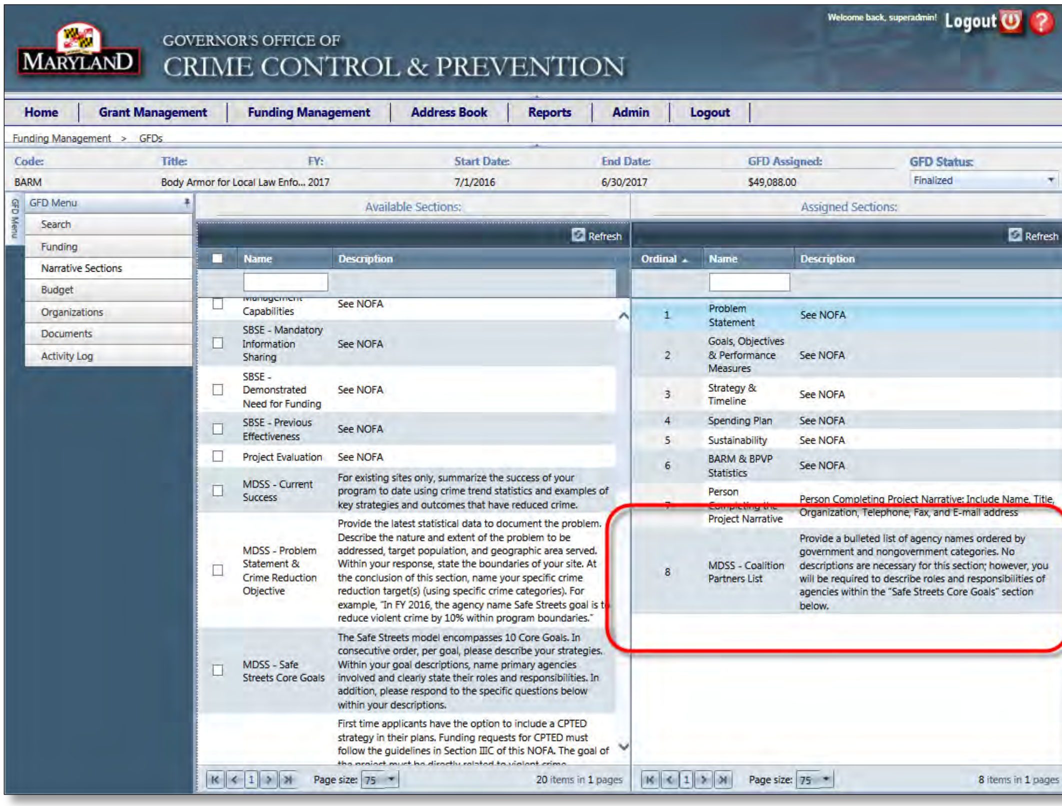


Figure 110 – Drag the available section into the assigned section area and release.

4. The newly assigned Narrative Section is displayed in the Assigned Sections.



6.4.1.4 Assign Budget Categories to a GFD

1. Click the Budget menu item in the GFD Menu to assign budget categories to the GFD. This will define the categories that can be used in applications (i.e., BARM would have only equipment selected).

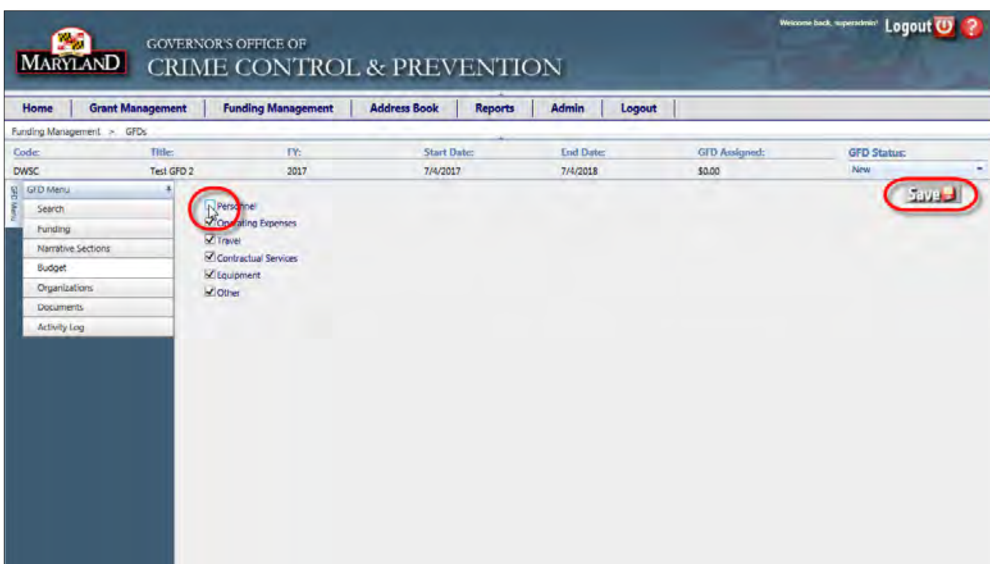


Figure 111 - Select Budget Items for the GFD

2. Click to place a checkmark in the Budget items you want to select for the GFD. When you are finished, click on the Save button to save your changes.

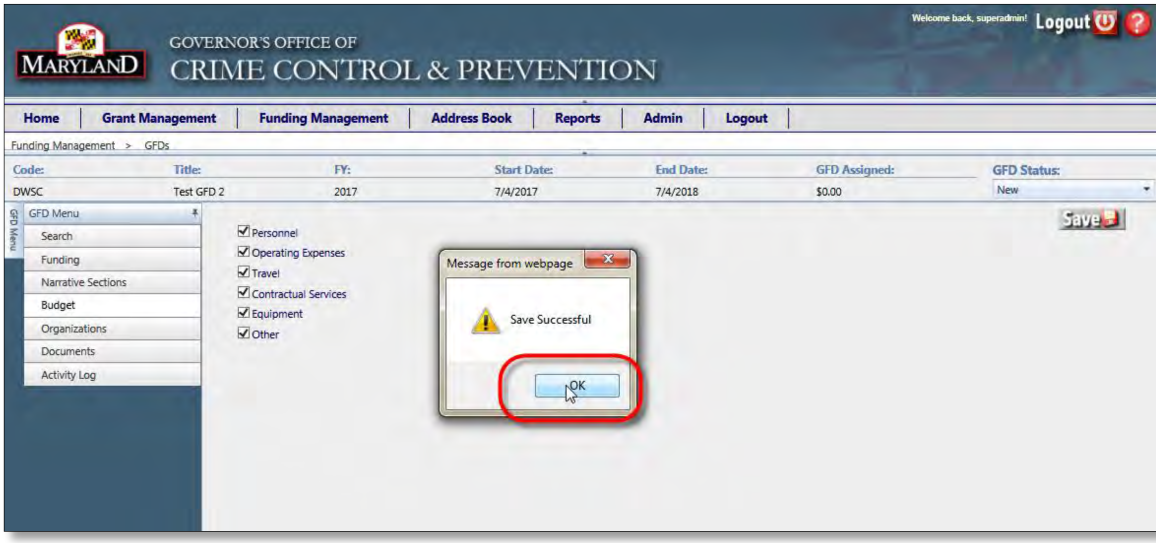


Figure 112 - Save Budget Category Selections

6.4.1.5 Add Organizations to a GFD

1. Click on Organizations in the GFD Menu to designate specific organizations that can apply for grants based on the GFD. This feature is helpful for continuation grants (MVOC), one-offs (PGVC), or narrowing to a specific sector (CAC). Note: if you do not designate any organizations, all can apply.

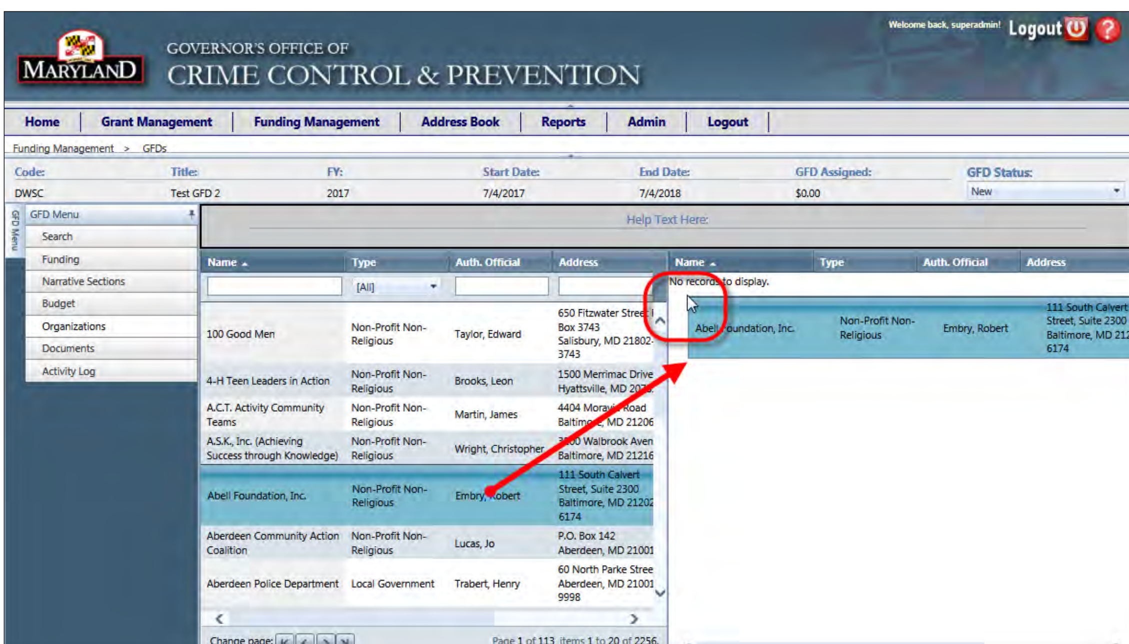


Figure 113 - Add Organizations to a GFD

2. Locate the Organization you wish to select for this GFD.

3. Left click on the record and hold the mouse button down.
4. Drag it over to the Selected Organizations panel.
5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
6. Repeat steps 2 through 5 for each Organization you wish to select for this funding program.

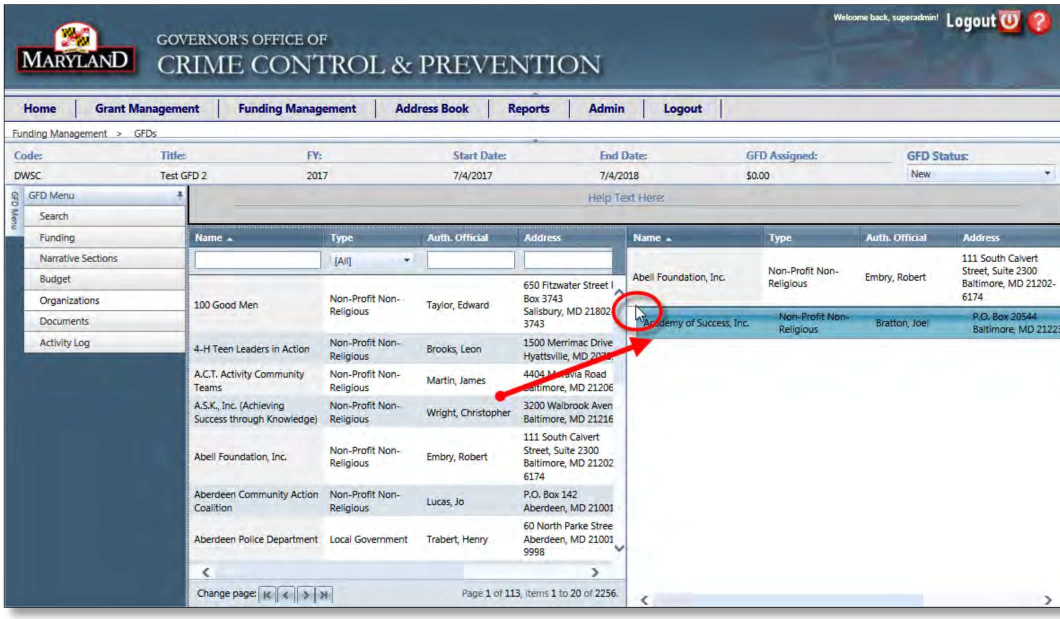


Figure 114 - Add Multiple Organizations to a GFD

6.4.1.6 Add Documents to a GFD

Use this screen to attach a NOFA and other supporting documents to a GFD.

1. Click Documents in the GFD Menu to the left of the screen.

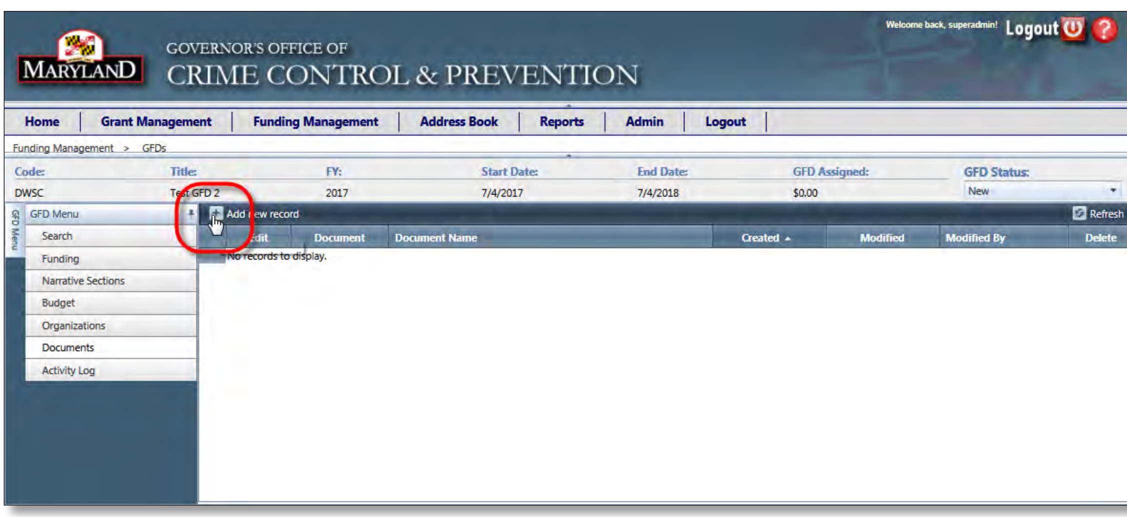


Figure 115 - Attach a Document to a GFD

2. Click the Add New Record icon to display the data entry screen. The data entry screen is shown:

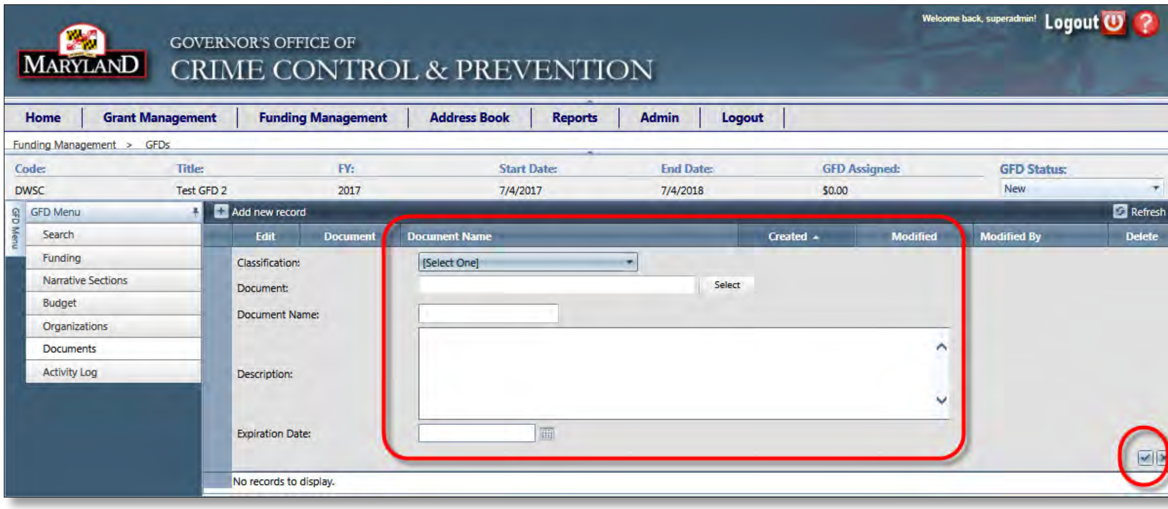


Figure 116 - Add Documents - Data Entry Screen

3. Select a classification for the document from the Classification drop-down list.
4. Type a descriptive name for the document in the Document Name field.
5. Click the Select button beside the Document field. This brings up a standard dialog box that allows you to search for the document on your hard disk and select it.
6. If applicable, click the calendar icon next to the Expiration Date field and choose a date by clicking on it
7. Type a description into the Description field.
8. Click the checkmark icon to the lower left of the screen to upload and save the document to the GFD. If you click on the cancel icon (X), the document will not be uploaded or saved and you'll be returned to the previous screen.

Important Note: As of 3/7/2013, if attaching multiple documents, the NOFA must be the last document attached. The last document attached will appear on the GMS homepage.

6.4.1.7 Add an Activity Log entry to a GFD

1. Click the Activity Log tab to highlight it, then click Add new record below the Activity Log tab.

Figure 117 - Add an Activity Log entry to a GFD

2. Upon clicking *Add new record*, the data entry screen appears:

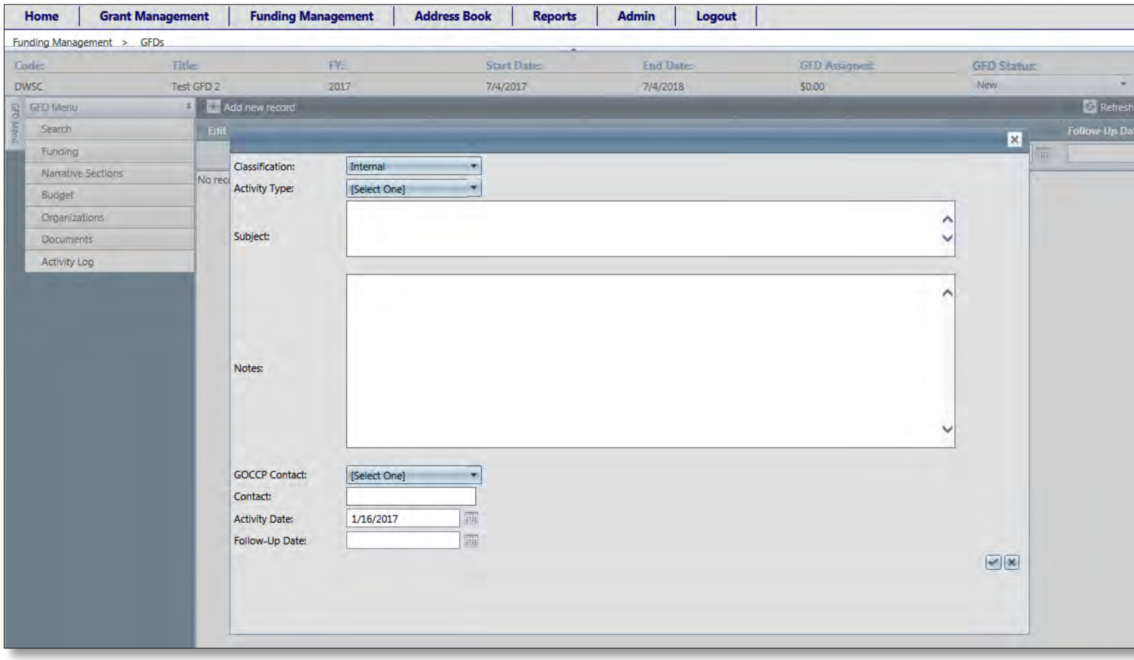


Figure 118 - GFD Activity Log - Data Entry Screen

3. Complete each field in the initial data entry screen for the new Activity Log entry as follows:

ACTIVITY LOG ENTRY FIELDS	
Classification	Click the dropdown list and select either **Internal** or **External**.
Activity Type	Click the dropdown list and select one of the following Activity Types: **Info Requested**, **Info Received**, **Sent Non-Funding**, **Correspondence**, **Phone Conversation**, **Site Visit**, **Application Notes**, **Meeting Note**, **Other**, **Email**, **Award Note**, **Close Out**, and **GAN**.
GOCCP Contact	Click the dropdown list and select the GOCCP contact relevant to this record.
Contact	Enter the name of the external contact (if applicable).
Activity Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Follow-Up Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Subject	Enter a brief description of the subject of this activity log entry into this field.
Notes	Enter any relevant notes regarding the activity into this field.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Activity Log record.

6.4.1.8 Finalize a GFD

When you have completed each of the menu items in the GFD Menu, the GFD is ready for finalization in the GMS. Once final, it will appear in the Available Funding dashboard of users' GMS home page.

1. Click the Status dropdown box and select Finalize:

Figure 119 - Finalize a GFD

2. Click OK when the Grant Funding Distribution successfully saved Dialog Box appears.

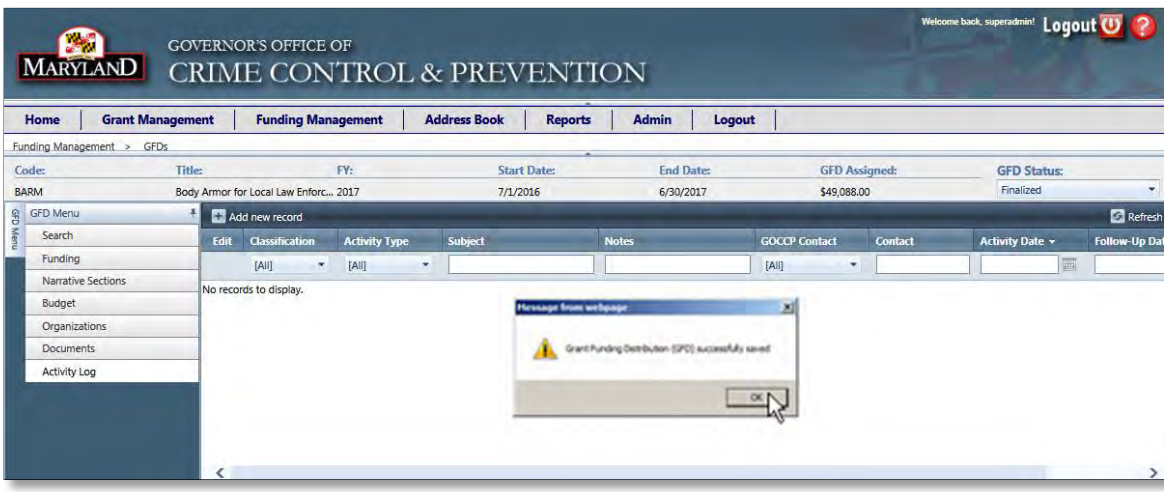


Figure 120 - GFD Finalization Confirmation

6.4.2 View GFDs

1. From your Home screen, select **GFDs** from the Funding Management menu.

2. The GFD home screen displays all existing GFD records. Refer to the table below for a description of the column headings for each Funding Year record.

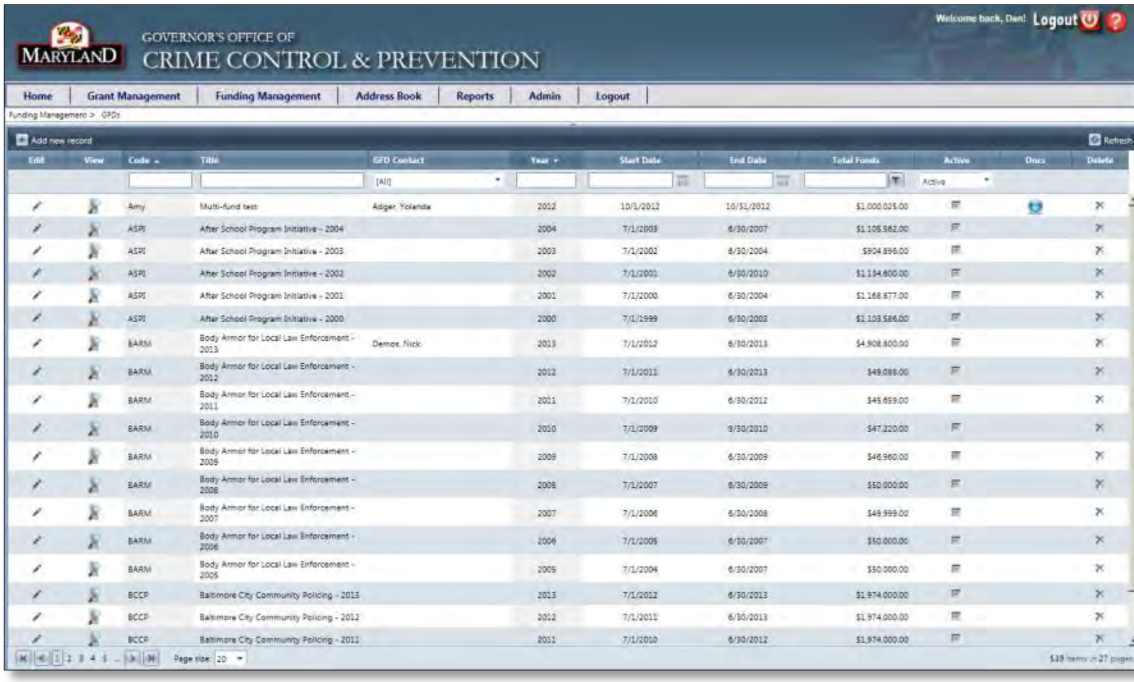


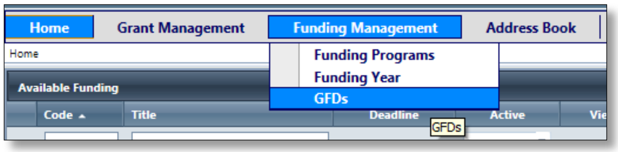
Figure 121 – GFD Home Screen

GFD TOP-LEVEL SCREEN DISPLAY FIELDS	
Edit	Click on the pencil icon in this column to edit an existing GFD record (refer to the procedure ***Edit a GFD*** later in this section).
Code	This field displays the 4 Character NOFA code (usually the primary funding program).
Title	This field displays the **Funding Year** title that the GFD is based on.
GFD Contact	This field displays the GOCCP contact who is responsible for managing the GFD.
Year	This field displays the NOFA year (usually the same as the primary funding source's year).
Start Date	This field displays the date sub-awards would start.
End Date	This field displays the date sub-awards would end.
Total Funds	This field displays the **Total Available Amount** of funding that remains for sub-recipients to apply for grants against for the GFD.
Active	This field indicates whether this GFD record is **Active** or **Inactive**.
Docs	Click on the magnifying glass icon in this field to view the NOFA document attached to the GFD.
View	Click on the icon in this field to edit the details of the GFD and manage them via the **GFD Menu** (**Funding**, **Budget**, **Organizations**, **Documents**, and **Activity Log**).
Delete	Click on the X icon in this column to delete an existing GFD record (refer to the procedure ***Delete a GFD*** later in this section).

6.4.3 Edit a GFD

To edit the high-level details of a GFD record:

1. From your Home screen, select **GFDs** from the Funding Management menu.



2. The GFD screen displays all GFD records.

Figure 122 - GFD Home Screen

3. Click the pencil icon in the GFD record you wish to edit. The high-level GFD data entry is shown.

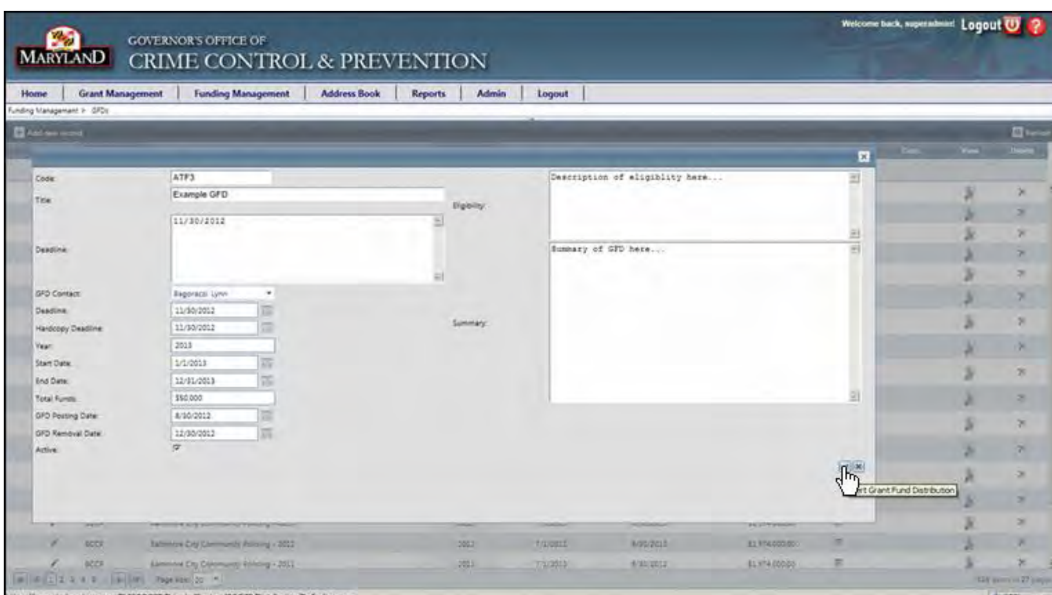
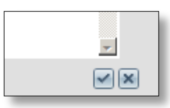


Figure 123 - Edit a GFD

4. Edit data in any of the data entry screen fields for the GFD as follows:

GFD - "ADD NEW RECORD" FIELDS	
Code	Enter the 4 Character NOFA code (usually the primary funding program).
Title	Enter the **Funding Year** title that the GFD is based on.
Deadline	Verbose description of deadlines (hardcopy and electronic dates/times). Free form text box.
GFD Contact	Select the name of the GOCCP contact who is responsible for managing the GFD from the dropdown list.
Deadline	Enter the date by which all grant applications based on this GFD must be submitted.
Hardcopy Deadline	Enter the date that GOCCP must receive hardcopies of grant applications by in order to be considered for awarding.
Year	Enter a NOFA year (usually the same as the primary funding source's year).
Start Date	Enter the date sub-awards would start.
End Date	Enter the date sub-awards would end.
Total Funds	Enter the **Total Amount** of funding that will be available for sub-recipients to apply for grants against for the GFD.
GFD Posting Date	Enter the date that the GFD will become available and be displayed in the Available Funding dashboard of the GMS home page.
GFD Removal Date	Enter the date that the GFD will be removed and no longer available.
Active	Click to place a checkmark in the box and designate the GFD as **Active**.
Eligibility	This is a free-form text box. Enter any special eligibility requirements that sub-recipients must be made aware of when applying for a grant based on the GFD.
Summary	This is a free-form text box. Enter a brief summary of the GFD that users will see when they click on the View icon for a GFD in the Available Funding dashboard.

5. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the GFD.



Press the **X** to cancel – you will lose any information you modified for the GFD if you cancel.

6.4.4 Delete a GFD

1. With proper system permission, you can delete a GFD by clicking on the X icon in the GFD row.

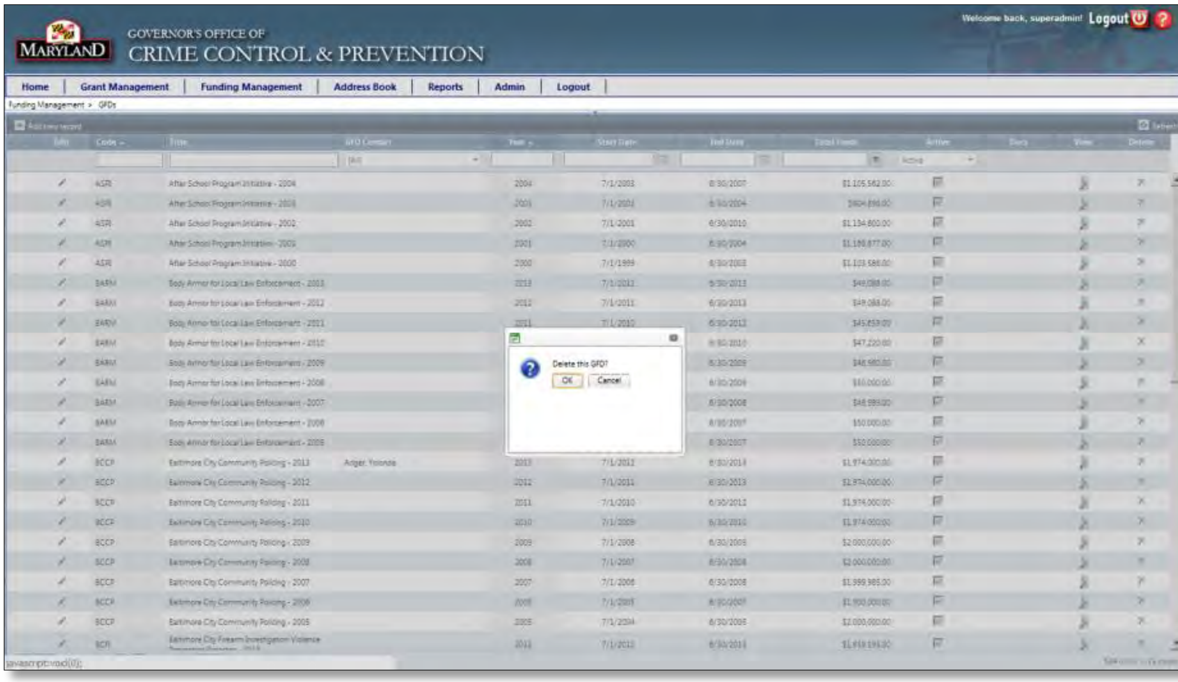


Figure 124 - Delete a GFD

2. After clicking the X, a "Delete this GFD?" confirmation message is displayed.

   - Click the OK button to delete the GFD.
   - If you click the Cancel button, the GFD is not deleted and you are returned to the GFD list.

7 Grant Management

7.1 Introduction

GMS provides full life-cycle support for the GOCCP Grant Application and Awarding Process. This section of the User Manual is presented in four parts:

- Creating Grant Applications provides detailed instruction on how to create, complete, and electronically submit a grant application, as well as how to withdraw an application. These procedures are included in the User Manual that is available to the public on the GOCCP GMS Public Home Page.
- Managing Grant Applications guides the internal GOCCP user through the process of turning a grant application into a grant award, including logging the initial receipt of a grant application, updating its status through the various reviews, and awarding the grant.
- Performing a Grant Award Review describes the process of preparing the award and making it available to the sub-recipient by assigning funds, goals, and objectives, and linking the award to any pertinent previous grants awarded to the same organization.
- Maintaining Grant Awards focuses on the procedures for managing awarded grants from the initial awarding through the life of the award to its closure, including topics like logging site visits and audits, disputes and grant adjustment notices, and report reviewing. This includes the procedure for programmatic reporting, which is also included in the User Manual available to the public.

7.2 Searching for a Grant Application

If an application you are searching for is not displayed in your Applications dashboard on the GMS Home Page, you can see a full listing of applications by accessing the Application Search screen from the Grant Management menu:

Figure 125 - Access Grant Management -> Application Search

The Application Search screen is displayed. It contains more fields than the Applications dashboard, and allows you to view applications with all statuses.

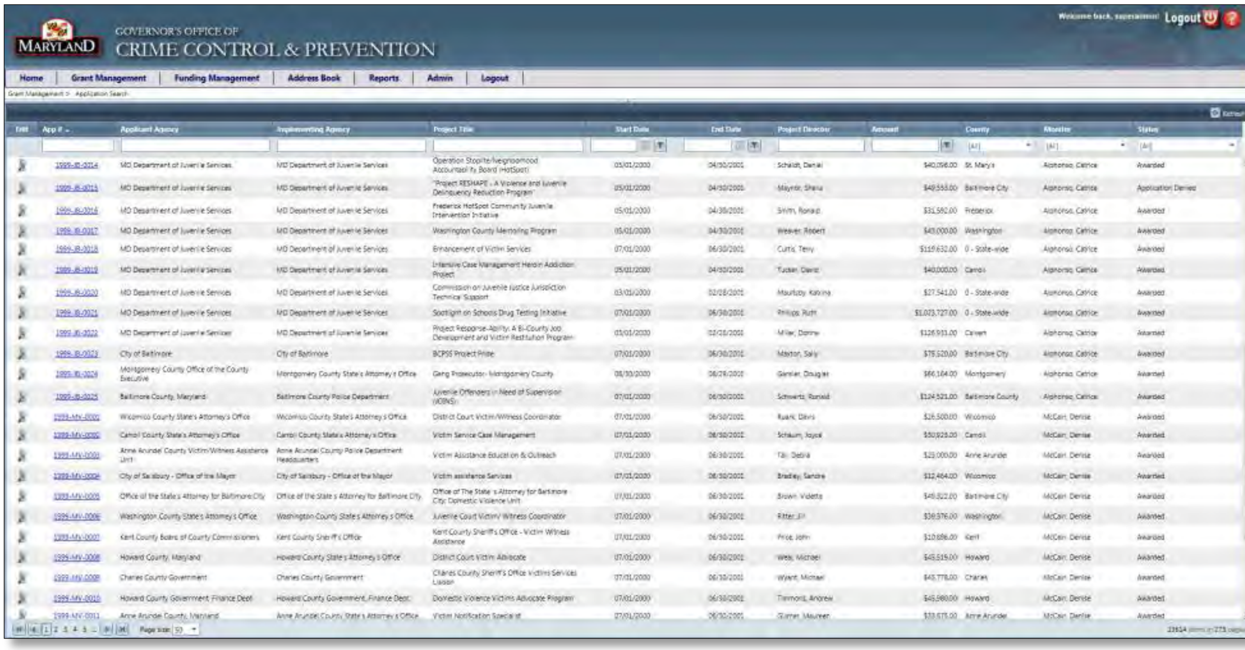


Figure 126 - GMS Grant Application Search Screen

Please refer to the section ***Sorting, Filtering, and Searching for Records*** for help with finding a grant application.

7.3 Creating Grant Applications

7.3.1 Apply for a Grant

The following procedure describes in detail how to apply for a grant based on funding opportunities/NOFAs made available through the GOCCP. The major steps include:

1. Locate Funding Source for your Project
2. Create new Grant Application Record
3. Complete Project Face Sheet
4. Assign Officers
5. Add Service Sites
6. Add Project Summary
7. Add Project Narrative
8. Create Project Budget
9. Attach Documents to Grant Application
10. Upload valid 501(c)3 letter if non-profit (religious or non-religious)
11. Upload valid SAM.gov Screenshot if applying for Federal GFD
12. Electronically Submit Grant Application to GOCCP
13. Print Grant Application for Hardcopy Submission

As with any type of application, this is an iterative process where at times the application is returned by the grant manager to the applicant for clarification or more detail. You can use the processes described in this section when you are revising or updating an application and re-submitting it for approval.

7.3.1.1 Locate Funding Source for your Project

1. Locate the NOFA you want to use to fund your new project in the Available Funding Dashboard.

    - To narrow the list down to Active NOFAs, click on the drop-down list in the Available Funding Dashboard and select **Active**. The resulting list displays only active NOFAs.

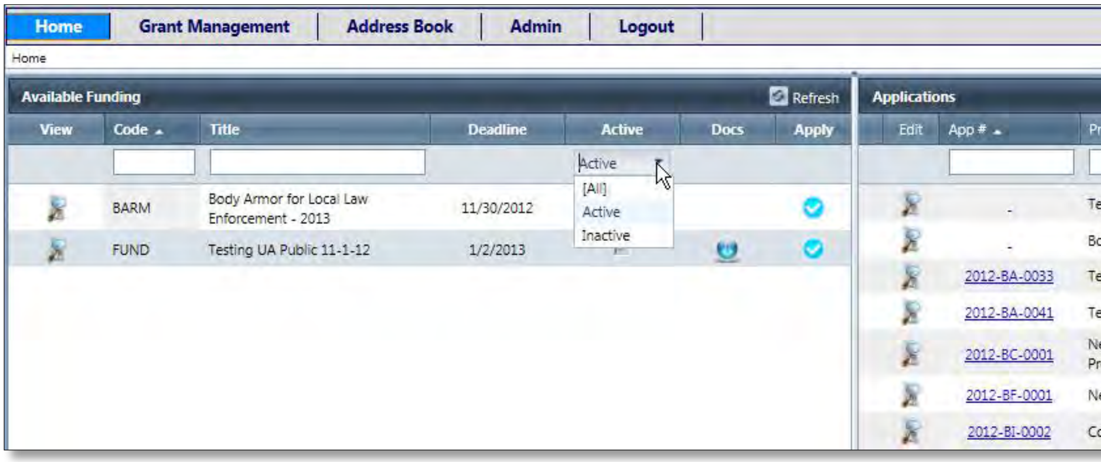


Figure 127 – View only Active NOFAs

- If the NOFA list is very long, search by Code or Title. If you know the NOFA Code, type it into the Code field and press Enter. The resulting list displays only the NOFA that matches the Code you entered.
- If you don't know the Code, type any keywords that might be in the NOFA title into the Title field and press Enter. The resulting list displays only NOFAs that contain your keywords in their title.

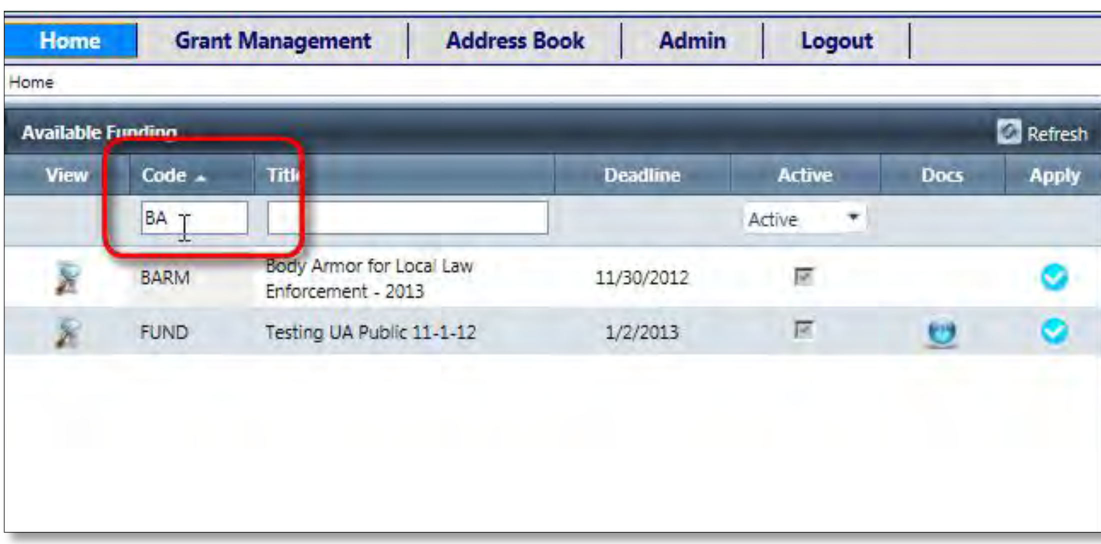


Figure 128 - Search for NOFAs by Code or Title

- Click on the View button to display overview information for a NOFA. Click on the X to close the pop-up Display window.

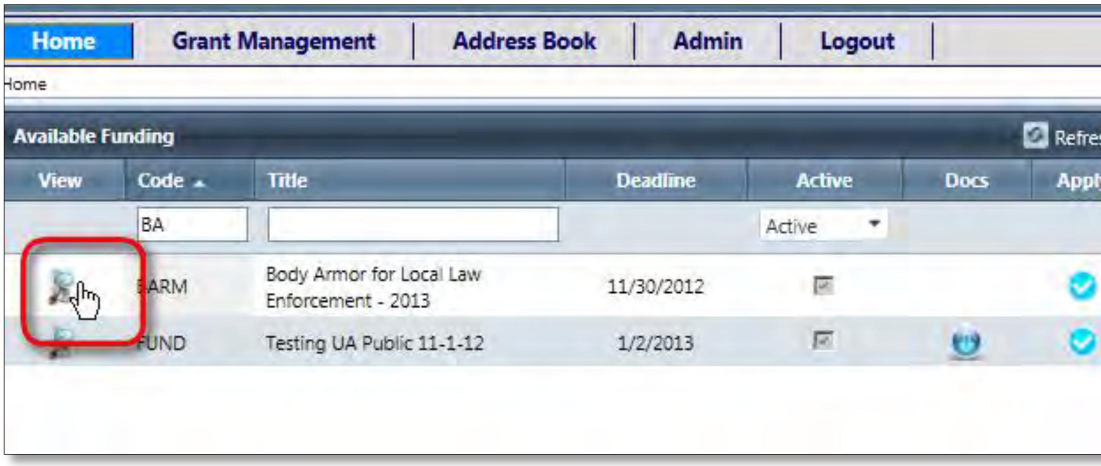


Figure 129 - View NOFA Overview Information

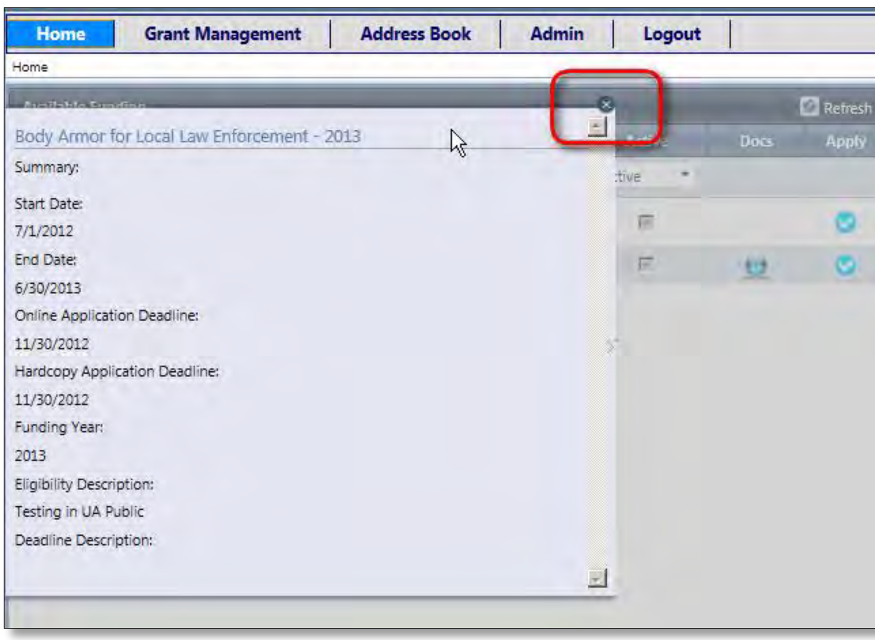


Figure 130 - NOFA Information Pop-Up Window

- If you would like to review/print the hardcopy NOFA for this record, click on the icon in the Docs column of the record. The hardcopy NOFA contains program specific requirements needed to complete a grant application. The application cannot be accurately completed without following the instructions provided in the hardcopy NOFA. A standard browser dialog box will appear, prompting you to either view or save the document to your hard disk.

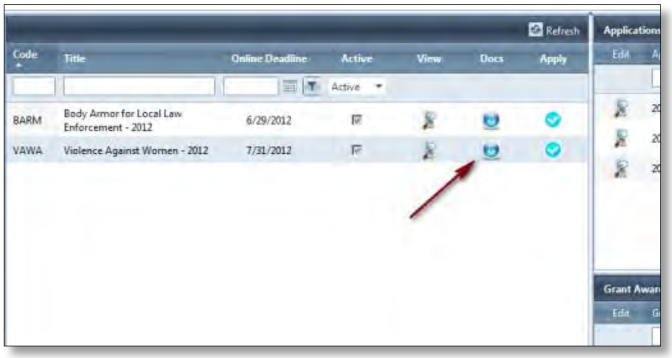


Figure 131 - View the hardcopy NOFA

7.3.1.2 Create new Grant Application Record

1. Once you have located the appropriate NOFA in the Available Funding Dashboard, click the Apply button associated with it to begin the application process.

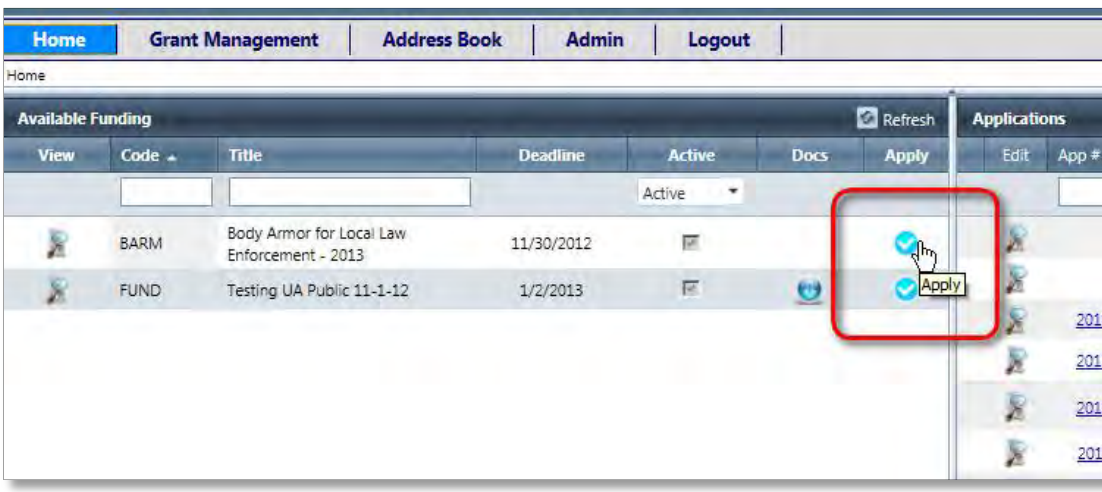


Figure 132 – Click Apply on NOFA to Begin Application Process

- The Initial Grant Application Screen (Face Sheet) is displayed.

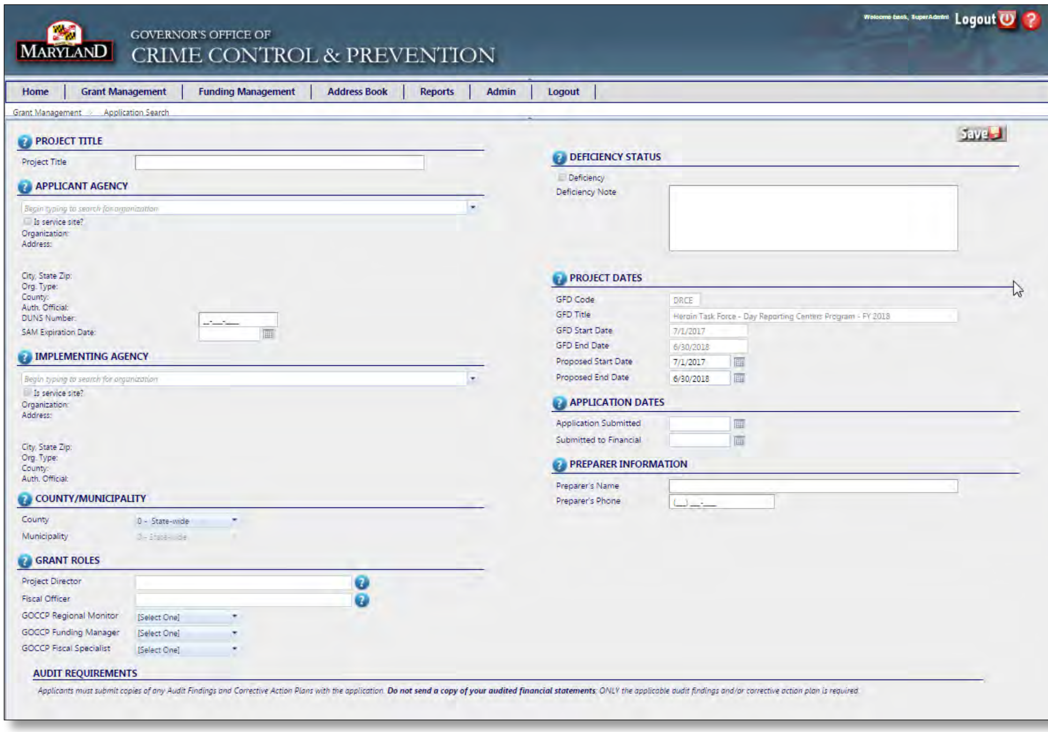


Figure 133 - Initial Grant Application Screen (Face Sheet)

7.3.1.3 Complete Project Face Sheet

NOTE: After entering the required information in this screen, you must click the Save button in order to enter additional Grant Application information.

- Enter a brief (one line only), descriptive title of the program you are proposing for funding into the Project Title box. *See hardcopy NOFA guidelines for proper naming of a project*.

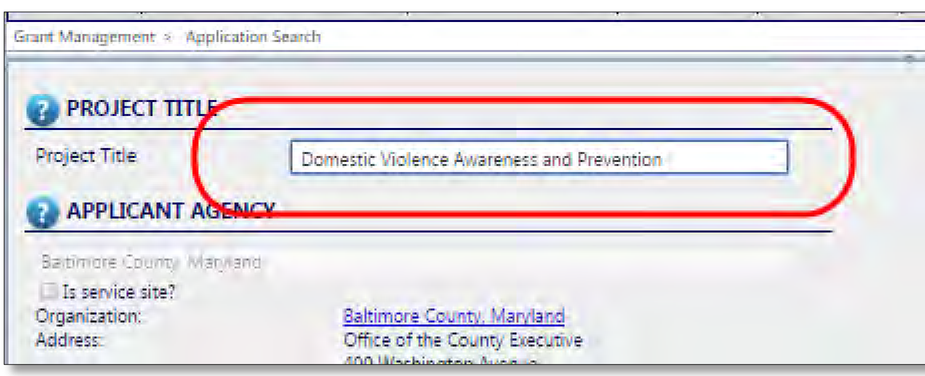


Figure 134 - Enter Project Title

- Your Applicant Agency is assigned to you based on your User ID and cannot be changed.

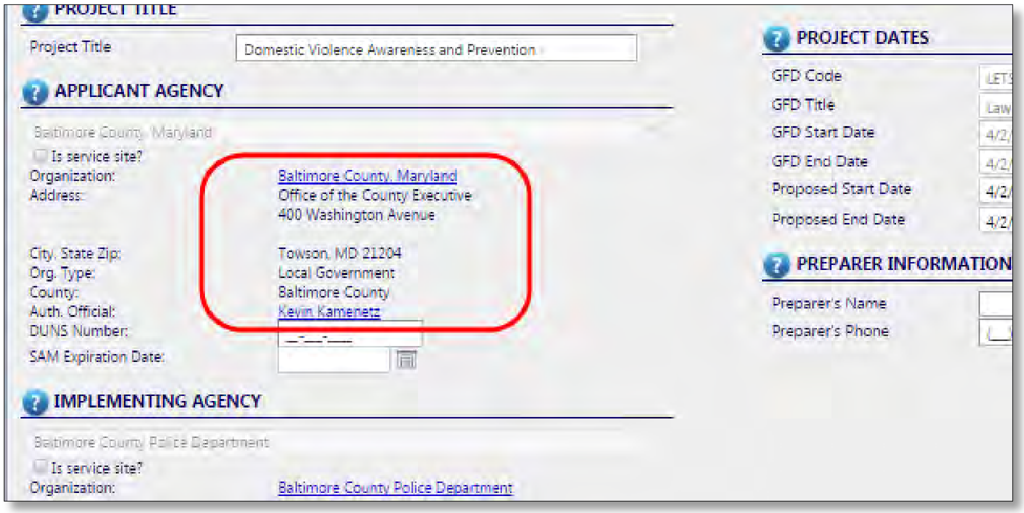


Figure 135 - View Applicant Agency Information

- If your Applicant Agency is a Service Site (services are provided at the applicant agency's physical location), click on the **Is Service Site** checkbox to place a checkmark in it. Additional service sites may be entered later in the application process.

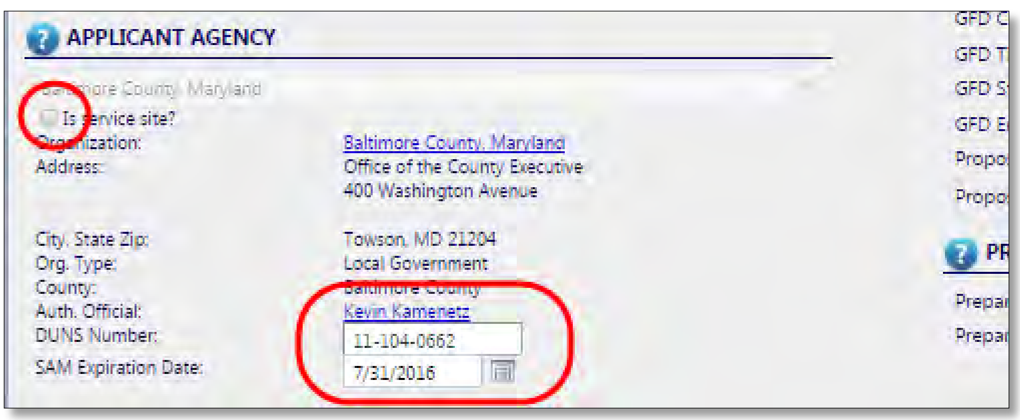
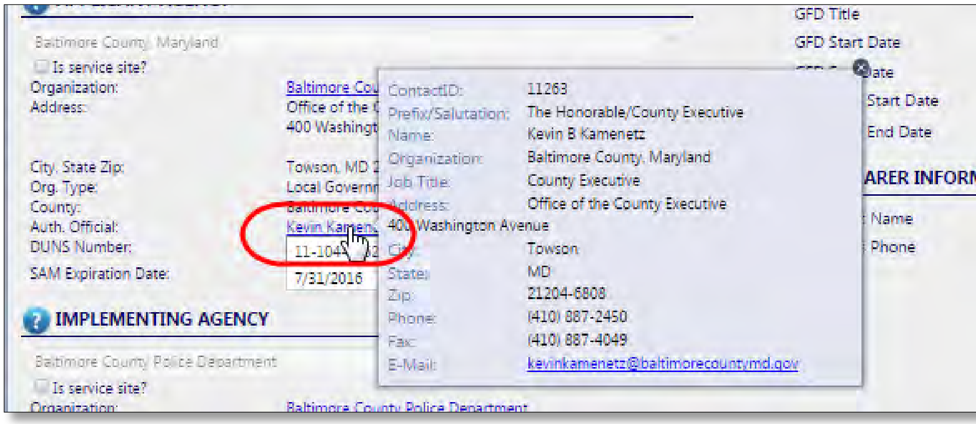


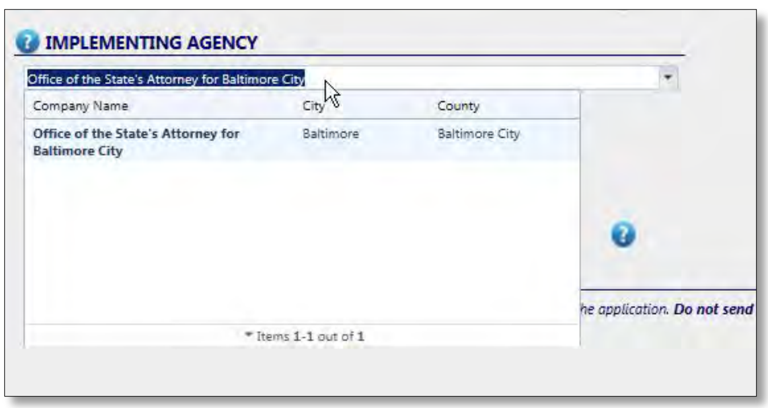
Figure 136 - Designate Applicant Agency as a Service Site

- Enter the **DUNS Number**, which is a unique nine-digit identification number representing the physical location of your organization
- Enter the **SAM Expiration Date** – your organization's System for Award Management registration.
- Click on the authorized official of the Applicant Agency to view contact information for that person.



- The Implementing Agency for the new grant defaults to the Applicant Agency location. If the Implementing Agency is different from, or a sub-agency of the Applicant Agency, select it from the drop-down list as follows:

1. Select the text currently in the Implementing Agency box.



2. Press the Delete key to clear the field.

3. When the field is cleared, the drop-down list will be populated with valid agencies. Click on an agency to select it as the Implementing Agency.

- As with your Applicant Agency, if you're Implementing Agency is a Service Site (services are provided at the implementing agency's physical location), click on the **Is Service Site** checkbox to place a checkmark in it. Additional service sites may be entered later in the application process.
- As with your Applicant Agency, to display Contact Information for the authorized official of the Implementing Agency, click on the **Question Mark** button next to their name.

Figure 137 - Designate Implementing Agency as a Service Site

- Click on the authorized official of the Implementing Agency to view contact information for that person.

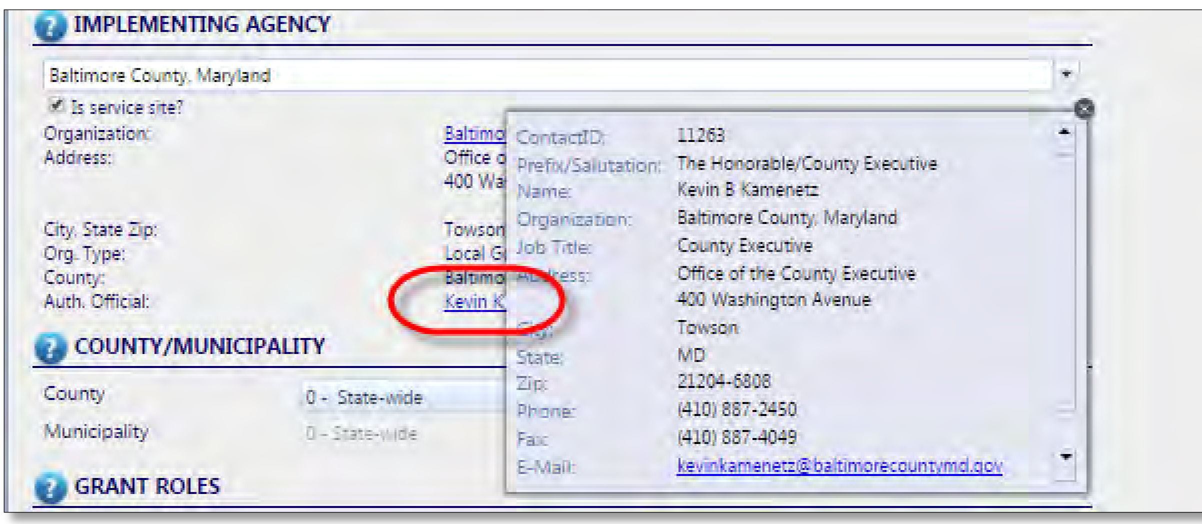


Figure 138 - Display the Contact Information Pop-Up Window

- To close the Contact Information pop-up window, click on the **X** in the upper-right corner of the window.

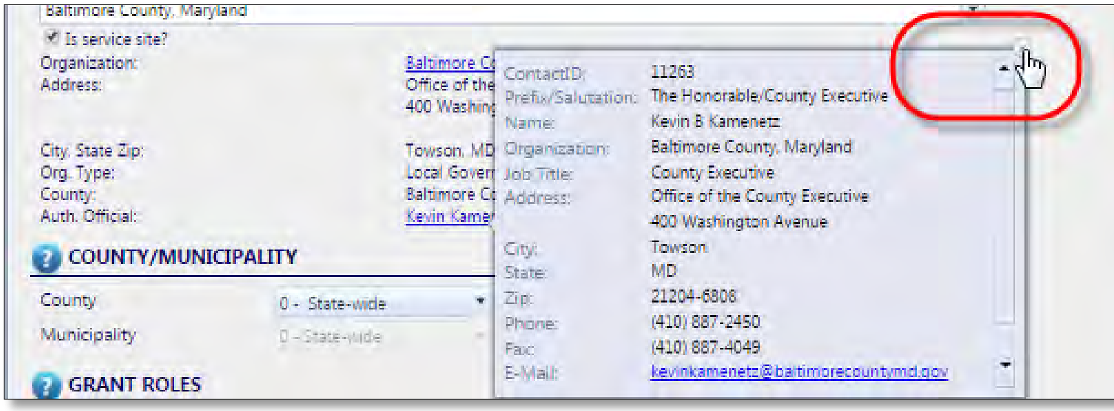


Figure 139 – Close the Contact Information Pop-Up Window

- County/Municipality: First, select the County from its drop-down list. Select **0 – State-**wide if the services will be provided state-wide. Then select the Municipality from its drop-down list.

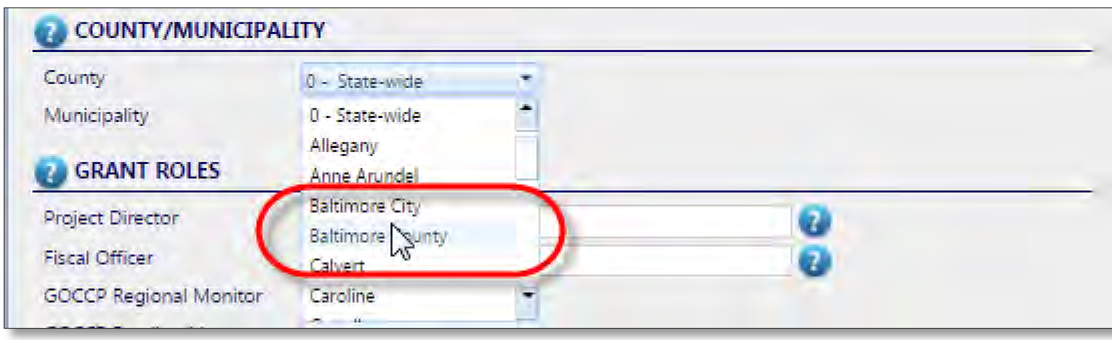


Figure 140 – Select the County

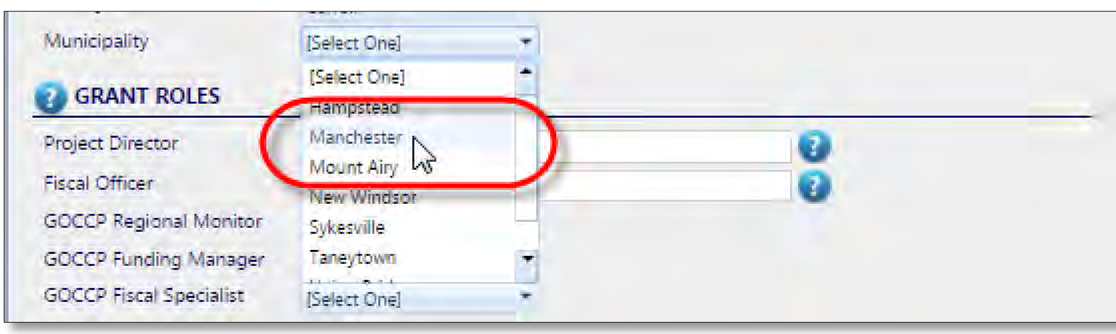
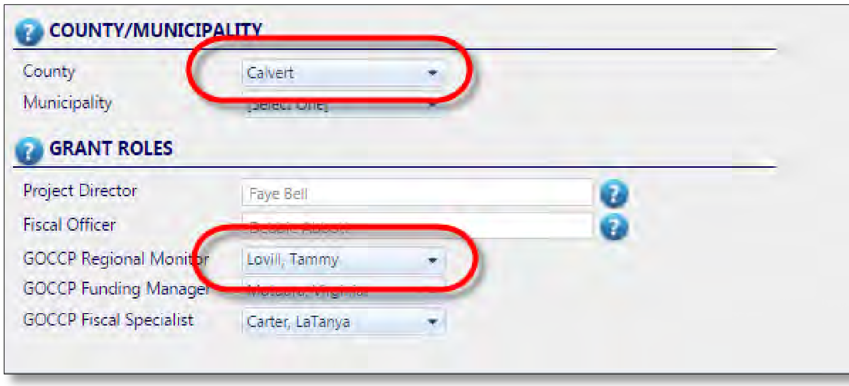


Figure 141 – Select the County

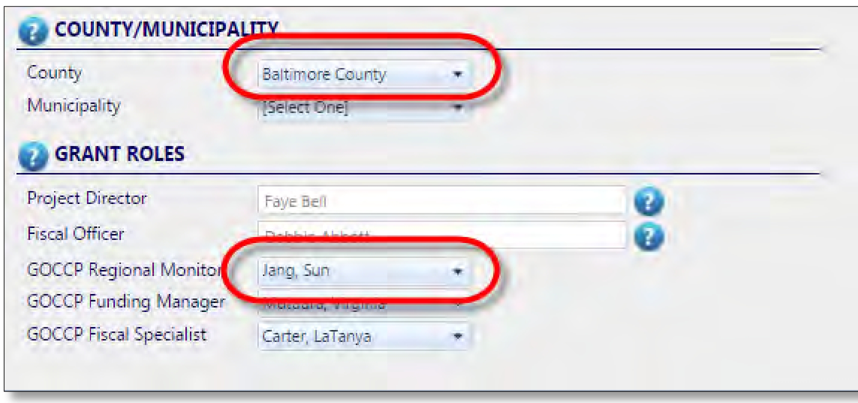
NOTE: Some County entries have no municipalities. If you click the Municipality drop-down list and there are no county entries, just leave it at [Select One].

- Grant Roles: You will be able to assign the Project Director and Fiscal Officer later in this process. GOCCP assign the three GOCCP Roles – Regional Manager, Funding Manager, and Fiscal Specialist based on the County you chose in the previous step.

  For example, selecting one county will auto-populate the GOCCP Regional Monitor:



When a different County is selected, the GOCCP Regional Monitor changes accordingly:



- Deficiency Status: This is located at the top-right side of the facesheet. You may skip this step in the initial grant application process.

- Enter the Proposed Start and End Dates for your project by clicking on the calendar icon next to each date field. The default displayed start and end dates are taken directly from the dates provided in the NOFA. These dates are required to proceed with the application process, and may be modified using the following guidelines:
  - Proposed Start Date must be *greater than or equal to* NOFA start date
  - Proposed End Date must be *less than or equal to* NOFA end date

Before you submit your application, you may change these dates at will. Once your grant has been awarded, you must go through the Grant Modification process as detailed in section 7.8.7.

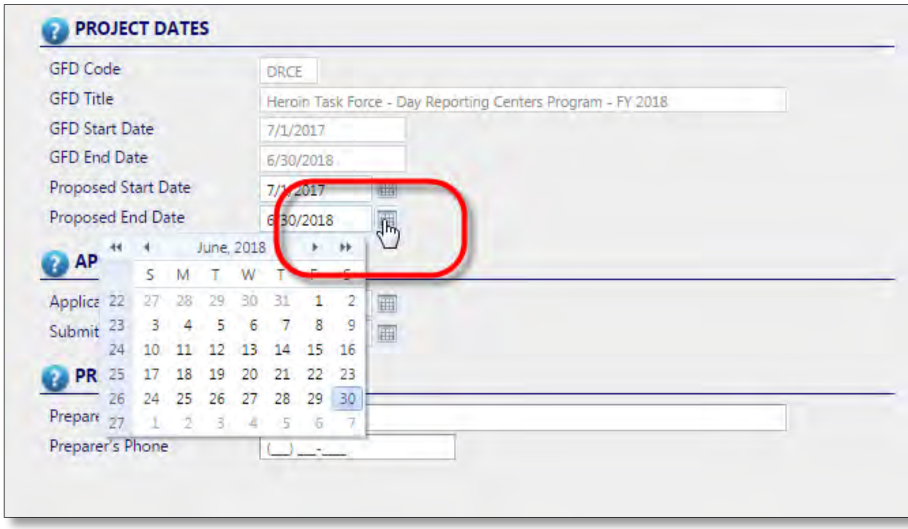
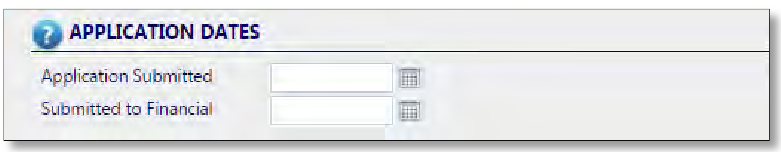


Figure 142 - Enter Proposed Start and End Dates

- Application Dates: This is where the date you submit your application, and when your application is submitted to Financial. No action required at this point.



- Click in the Preparer's Name field and enter your name (or the name of the primary Preparer if it is someone else in your organization. Click in the Preparer's Phone field and enter the corresponding phone number. Note: Type only the digits of the phone number into the field; the field is set up to automatically format the number with parenthesis, spaces, and a dash.

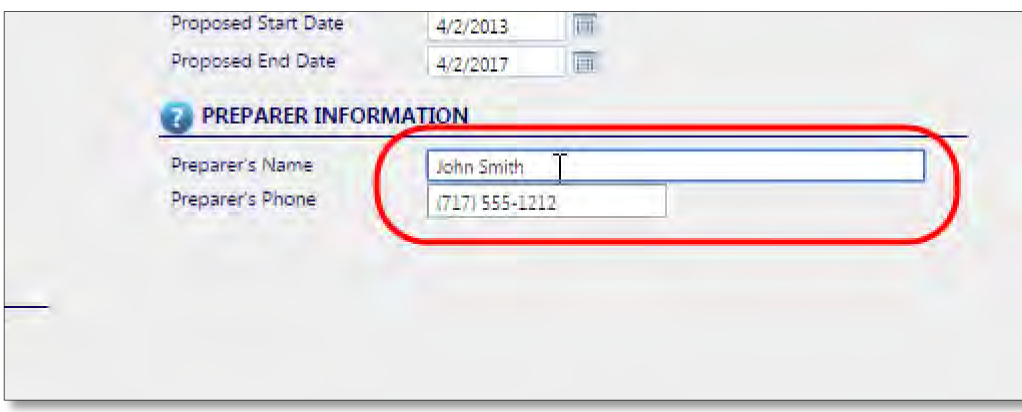


Figure 143 - Enter Preparer's Contact Information

- Click on the **Save** button to save the application as a draft, then click **OK** on the confirmation pop-up window when it is displayed to access the Detailed Grant Application Screen.

Figure 144 - Save the Application

- When the application draft is successfully saved, you are taken to the Detailed Grant Application Screen.

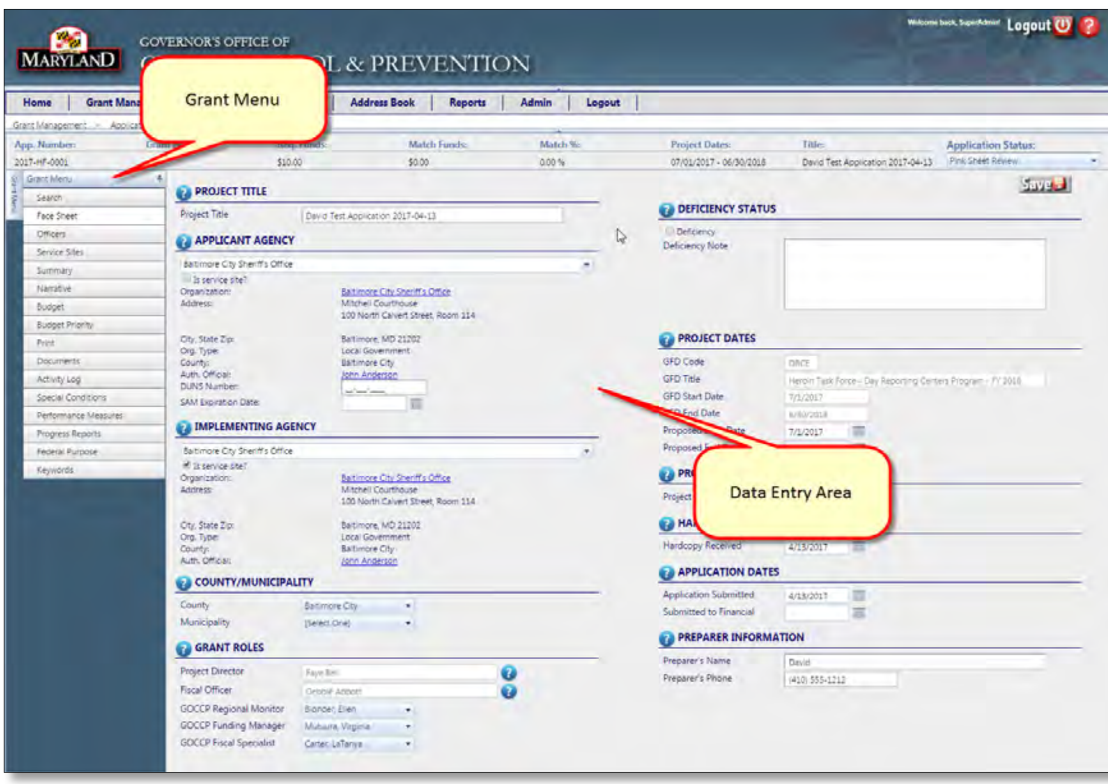


Figure 145 - Detailed Grant Application Screen

The Detailed Grant Application screen is divided into two areas – the Grant Menu sidebar and the Data Entry Area.

- The Grant Menu sidebar displays a list of sections required to complete a grant application.
- The Data Entry Area displays all of the required fields for each section in the Grant Menu list.

NOTE: To successfully complete and submit a grant application, you must provide all of the required information in each Grant Menu category as described in the remaining steps of this process.

The Grant Application Screen displays the Face Sheet first by default. The Face Sheet is the screen where you began the application process. If you need to update any face sheet information (i.e., Project Title, Dates, or Application / Implementing Agency information), you can do that here.

NOTE: The data entry area changes for each item you click on the Grant Menu. As you make your way through all of the items in the Grant Menu, be sure to click the **Save** button for that data entry screen, otherwise your changes will be lost. A few of the screens do not have a **Save** button on them – that is ok, the changes are automatically saved on those screens. A critical time to remember saving is when the data entry screen is long and you've scrolled down to add information. You just need to remember to scroll back up in order to hit the **Save** button.

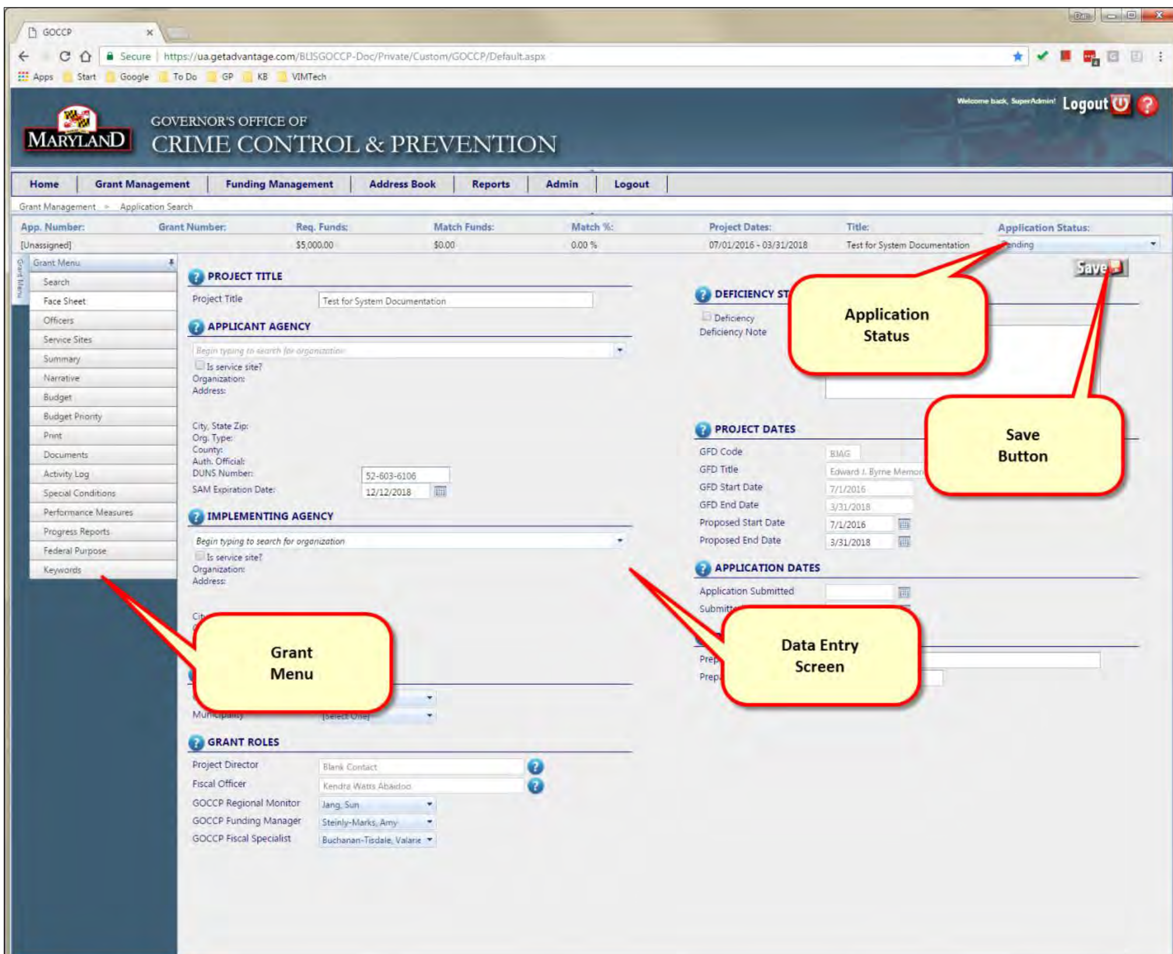
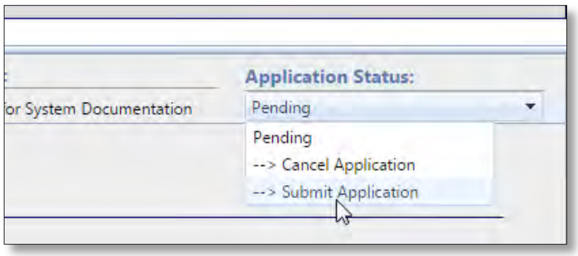


Figure 146 - Grant Menu Face Sheet Screen

7.3.1.4 A Note about Application Statuses

After completing and saving the Face Sheet, your screen will change (see Figure 144) – the Grant Menu shows up in the left part of the screen and the data entry screen where you enter information is to the right (by default, the Face Sheet will appear). To complete a grant application, you must work your way down the tabs in the Grant Menu to ensure your application is complete.

There is one more feature added to the screen – this is the **Application Status** drop-down list in the upper-right corner of the screen.

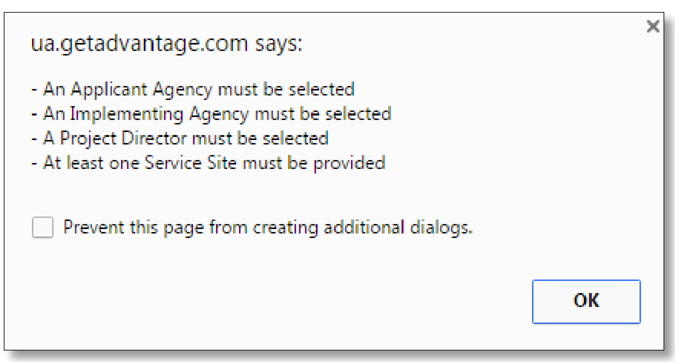


This **Application Status** mechanism drives the entire grant application, review, and awarding process.

For example, when you have completed your application, you submit it to GOCCP by clicking the arrow below the Application Status and selecting **Submit Application** from the drop-down menu.

NOTE:: This is an illustration to introduce the Application Status feature to you. You must complete Section 7.3.1 and all sub-sections ***prior*** to submitting your application as shown above or you will receive error messages telling you what you've missed.

For example, if you tried to submit your application prior to working your way down the tabs in the Grant Menu, you would receive an error message like the following on, and your application would stay in Pending mode:



The **Application Status** will always reflect the current status of your application or your award. To see what's next in the process, simply click the arrow below **Application Status** and you will be guided toward the next step in the process.

NOTE: At times the Application Status will remain static. In these cases, internal GOCCP users will be using the status to move applications through a series of checks prior to approving/denying the application.

7.3.1.5 Assign Officers

1. Click **Officers** in the Grant Menu to designate the officers for your project.

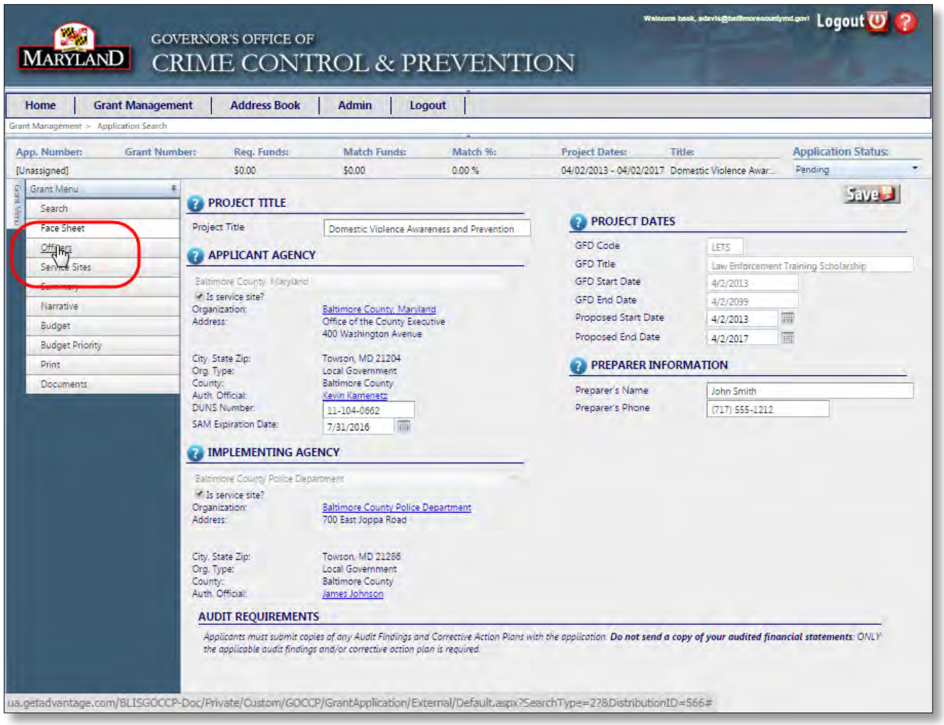


Figure 147 - Click Officers in Grant Menu

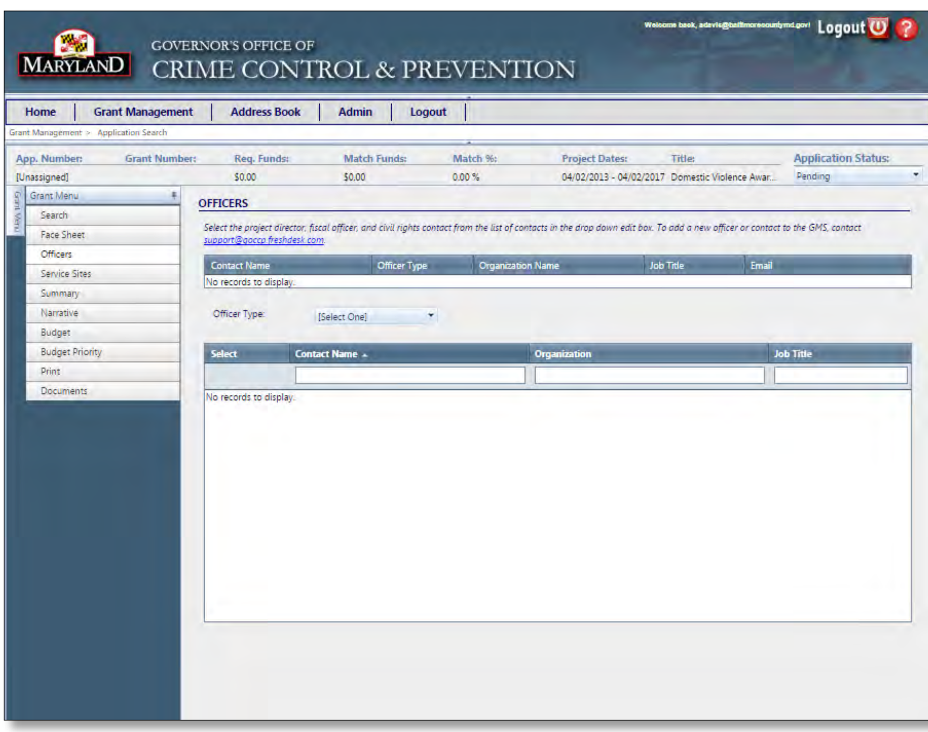


Figure 148 - Grant Menu Officers Screen

- A Project Director, Fiscal Officer, and Civil Rights Contact are required by GOCCP for every grant application.

2. Select **Project Director** from "Officer Type" drop-down list.

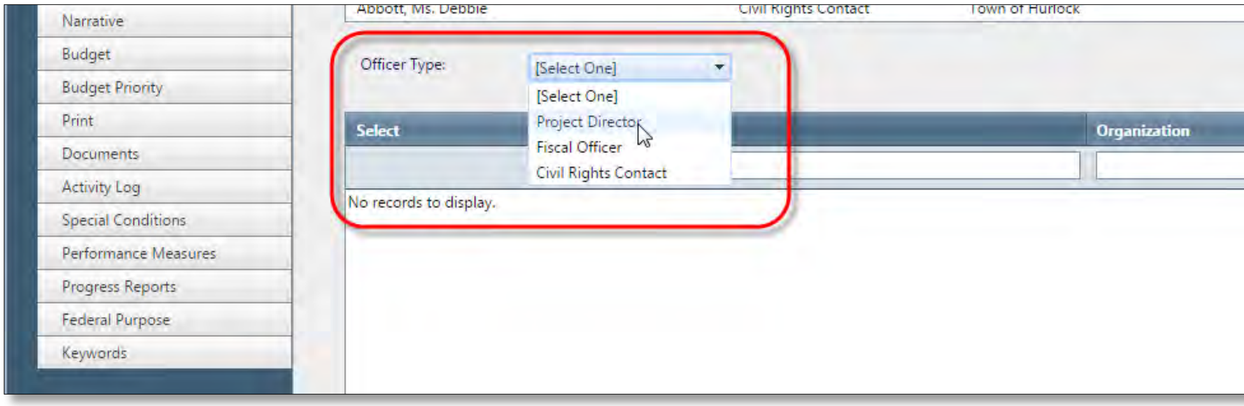


Figure 149 - Select Project Director from Officer Type Drop-down List

3. Navigate through the list of names to find and select your Project Director.

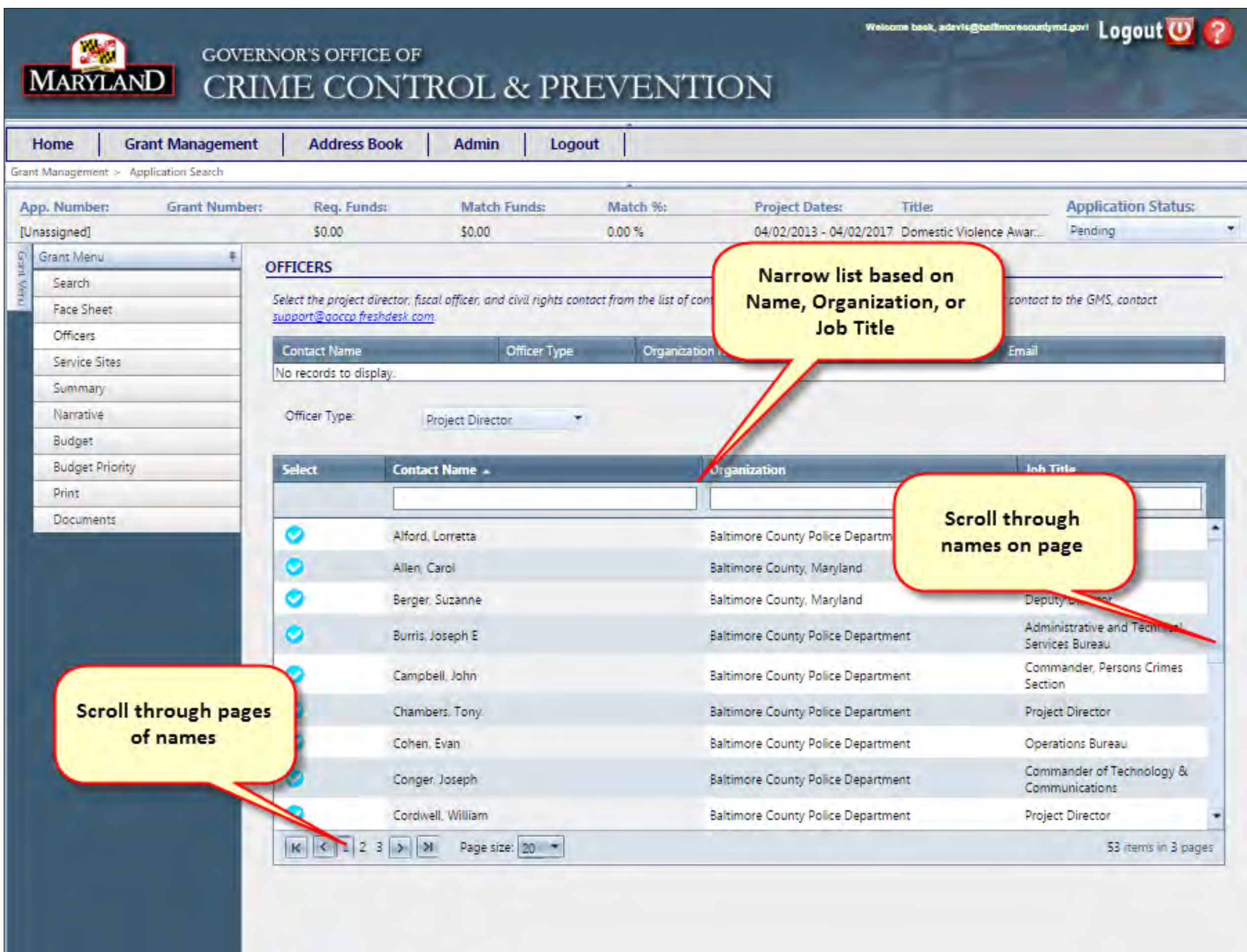


Figure 150 - Find a Contact to Designate as an Officer

You can scroll through the contact names on the current page by dragging the slider up and down, and you can scroll through the pages of names by clicking the next and previous buttons or select a specific page in the page number drop-down list.

You can also narrow the list by typing information in the Contact Name, Organization, or Job Title fields.

- It is not necessary to enter any of this information in full – the search will locate any contacts that contain any of the information you typed in.
- For example, if you know your Project Director's Job Title has the word "clerk" in it, like Account Clerk, type the word clerk into the Job Title field and press Enter. The search will return any contacts with clerk in their Job Title, as shown below.

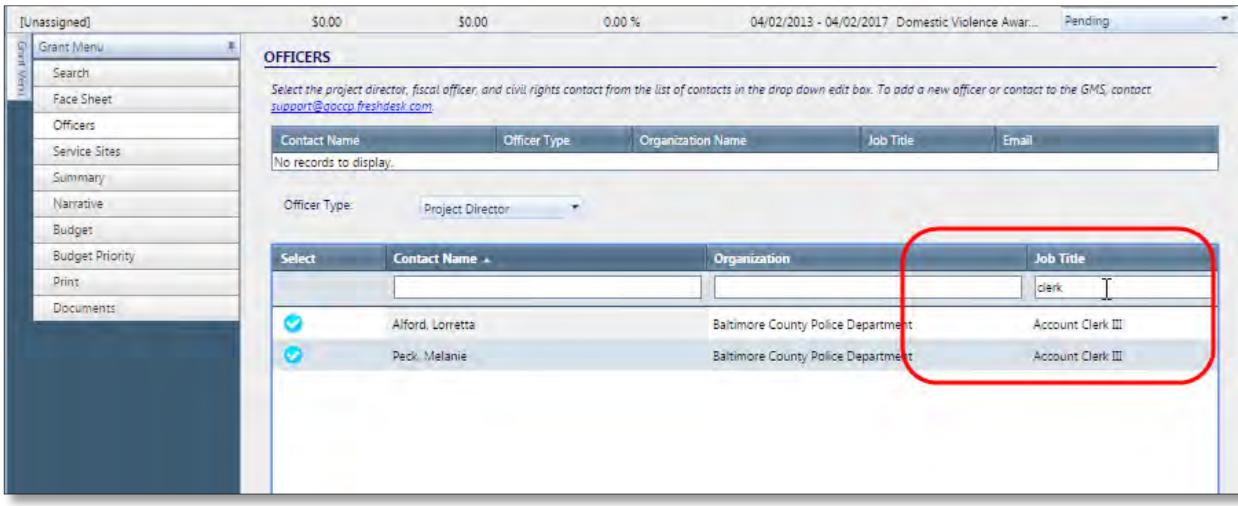


Figure 151 - Search Contacts using Keywords

4. Click the **Check Box** next to Contact Name to add that contact as the Project Director.

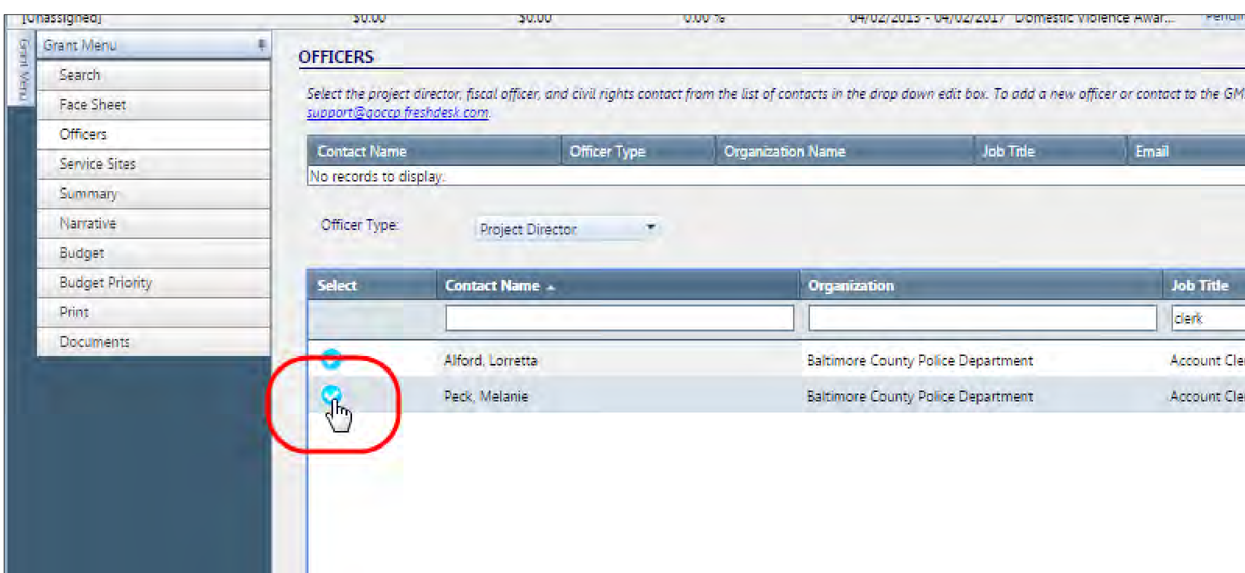


Figure 152 - Click Check Box to Select Contact

When the contact is selected, the Officers field is updated to display the selection. In this example, the contact was added as the Project Director.

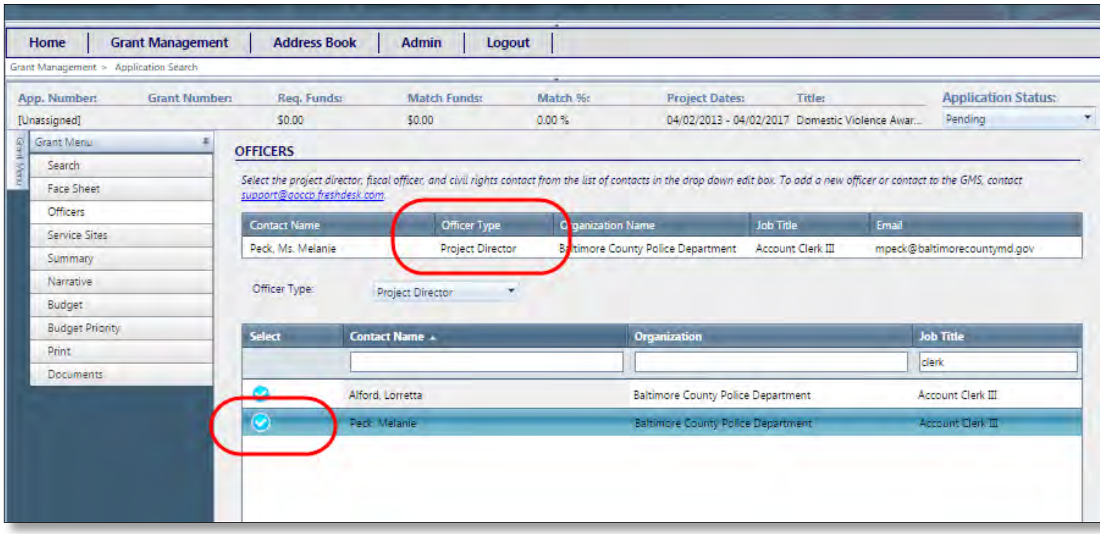


Figure 153 - Officer Added to Project

Note: the contact is added to the Officers list as soon as it is selected, so there is no **Save** button on this screen.

If you select the wrong contact by accident, repeat the search starting with selecting **Project Director** from the **Officer Type** drop-down list and clicking **Select** once you've found the correct contact. The Project Director line in the Officers field is updated to the new selection.

5. Repeat steps 2-4 to assign the **Fiscal Officer** and **Civil Rights Contact** for your project.

Before you submit your application, you may change these contacts at will. Once your grant has been awarded, you must go through the Grant Modification process as detailed in section 7.8.7.

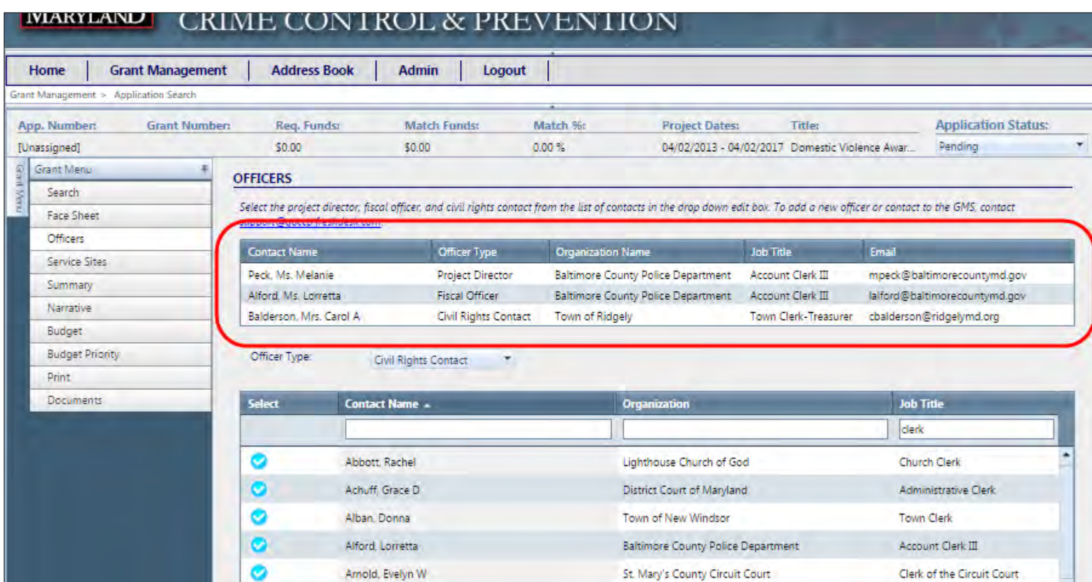


Figure 154 - Project Director, Fiscal Officer, and Civil Rights Contact Added to Application

7.3.1.6 Add Service Sites

1. Click **Service Sites** in the Grant Menu to view and add service sites to your project.

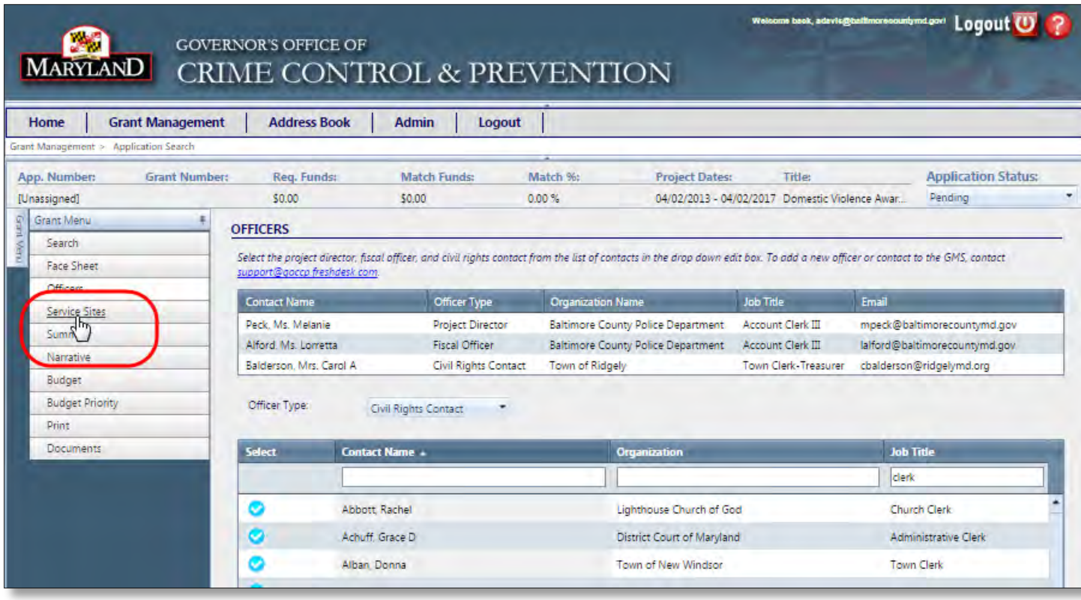


Figure 155 – Click Service Sites in Grant Menu

- Note: Any Service Sites indicated on the Face Sheet will automatically be displayed on this screen.

2. Click **Add new record** to add a service site to your project.

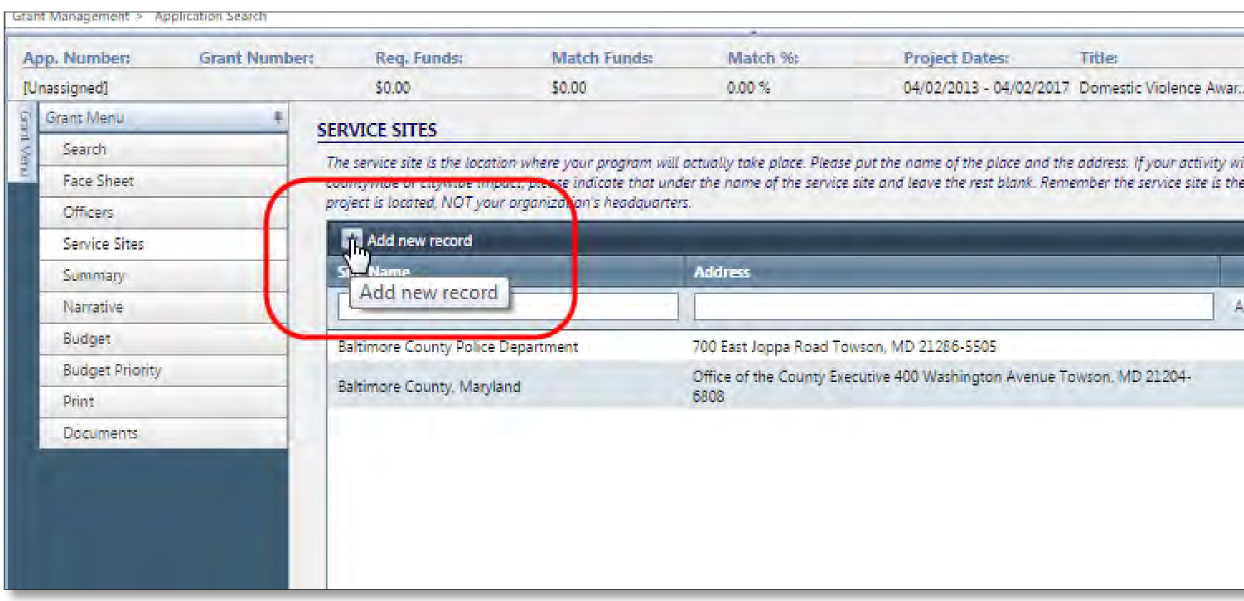


Figure 156 - Add a New Service Site Record

3. Enter the site name and address then click the **Checkmark** to save or the **X** to cancel.

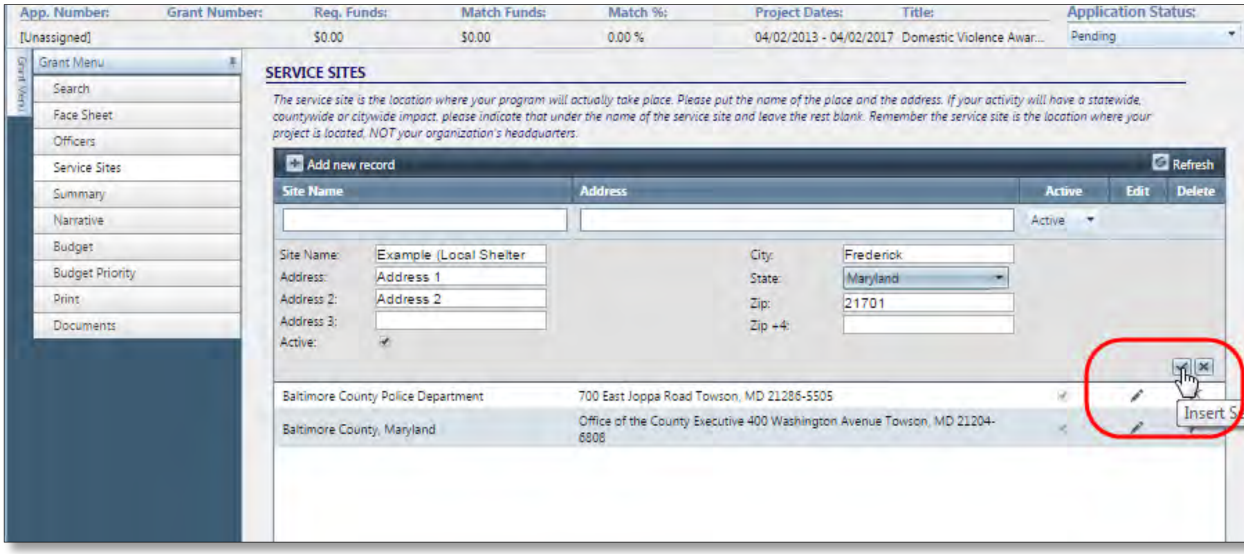


Figure 157 - Click Checkmark to Save New Service Site Record

7.3.1.7 Add Project Summary

1. Click on **Summary** in the Grant Menu to add a brief project summary. Instructions for writing the Project Summary appear in the hardcopy NOFA.

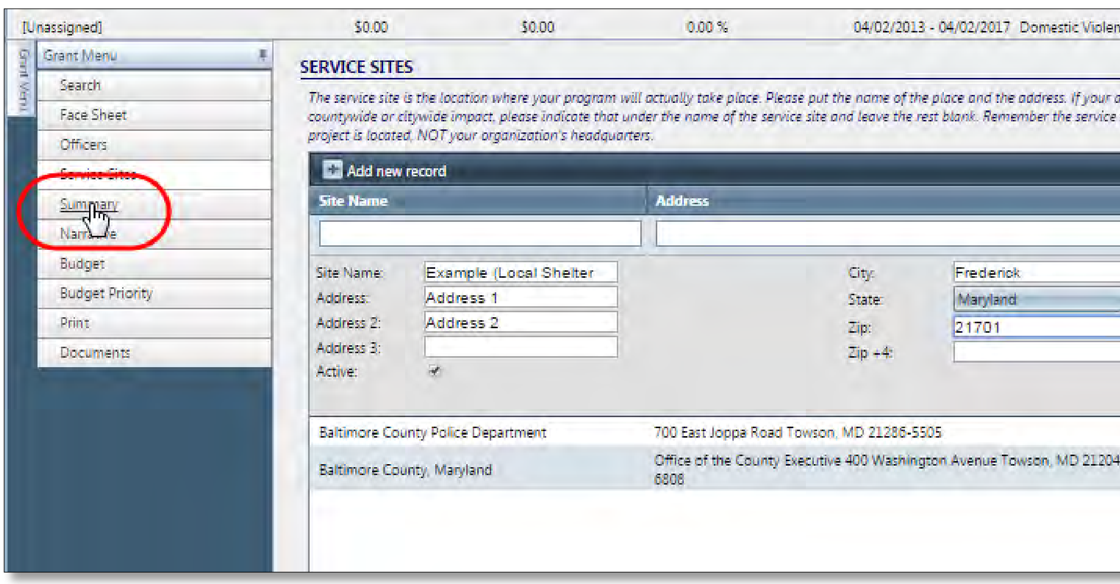


Figure 158 - Click Summary in Grant Menu

Based on the parameters outlined in the hardcopy NOFA, enter a summary of your project in the Summary box and **click the Save button**.

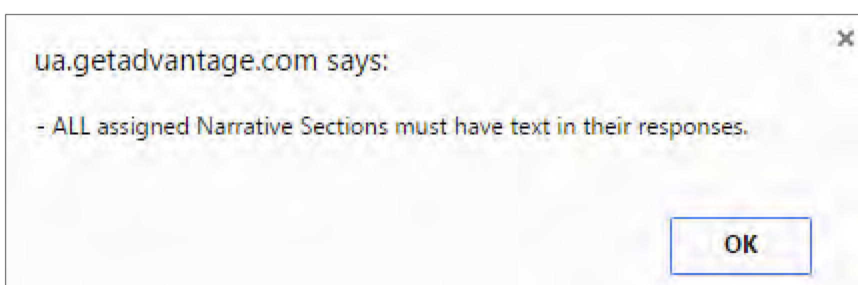
Figure 159 - Add Project Summary

7.3.1.8 Add Project Narrative

When GOCCP creates a NOFA, they assign one or more **Narrative Sections** that must be completed by an applicant prior to submitting an application. The content requirements for each Project's Narrative Sections are explained in the NOFA for each grant.

NOTE

- Completing this section of the application is mandatory.
- Failure to provide a properly prepared narrative (as dictated by the NOFA) could delay the processing of your application.
- If you try to submit an application without completing all assigned Narrative Sections, you will receive the following message:



To access the Narrative screen:

1. Click **Narrative** in the Grant Application Menu to view and edit the Narrative Sections that are required in order for your grant application to be considered. Detailed instructions for completing each Narrative Section appear in the hardcopy NOFA.

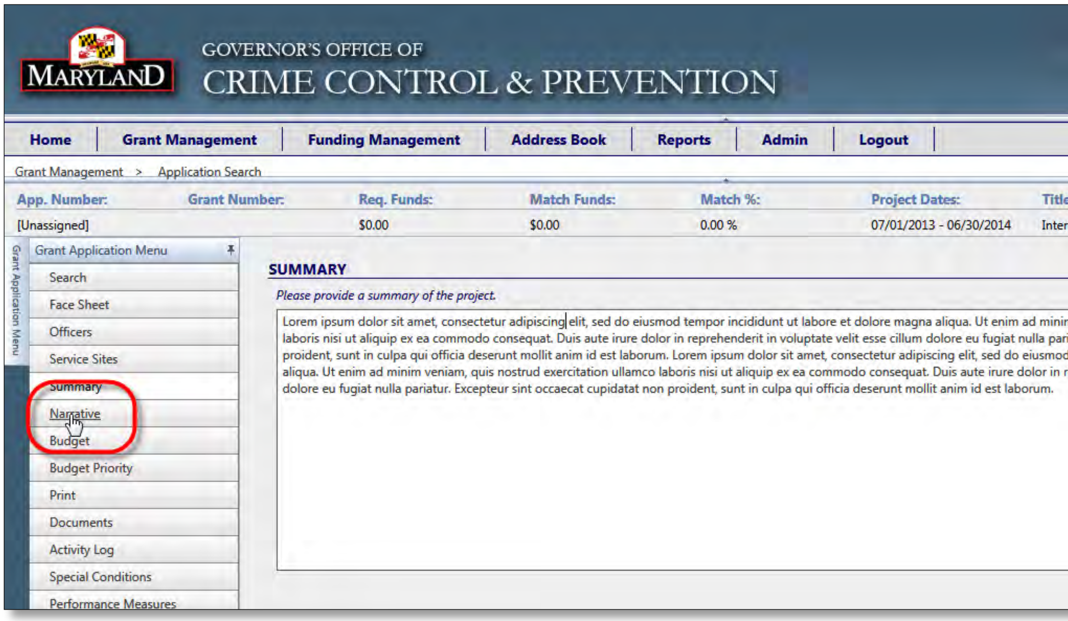


Figure 160 - Click Narrative in Grant Application Menu

2. The Narrative screen is displayed:

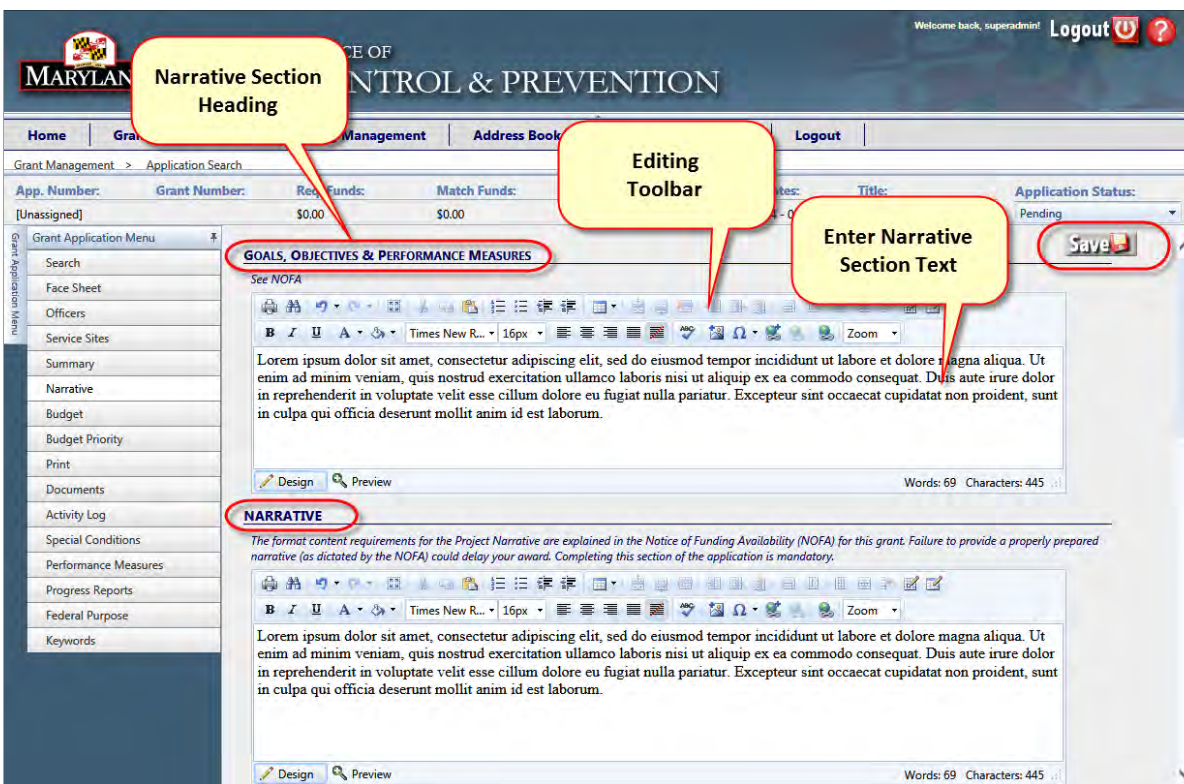


Figure 161 – Narrative screen explained

- Each required Narrative Section is displayed on the screen – you may need to scroll down to view and complete all required sections.
- Each Narrative Section has a heading that describes the type of narrative required. In this example, the first Narrative Section heading is **Goals, Objectives, & Performance Measures**. Refer to the hardcopy NOFA for the information required in this section.
- The text for each Narrative Section is stored as rich text, or formatted text, which means that you can paste narrative into the application from a word-processing program. If you type your narrative text directly into this application, you can still format it like you would in a word processor, using bullet and numbered lists, indentation, and bold/italic characters, all accessible from the Editing Toolbar.
- It is good practice to save your work after completing each Narrative Section. The **Save** button is in the top-right part of the screen. ***When working on Narrative Sections that you had to scroll down on the screen to access, remember to scroll back up and click the Save button when you complete the section***

3. Click inside a Narrative Section box to begin entering your text. Use the Editing Toolbar to format your text as desired. Be sure to save your work when finished with each section.

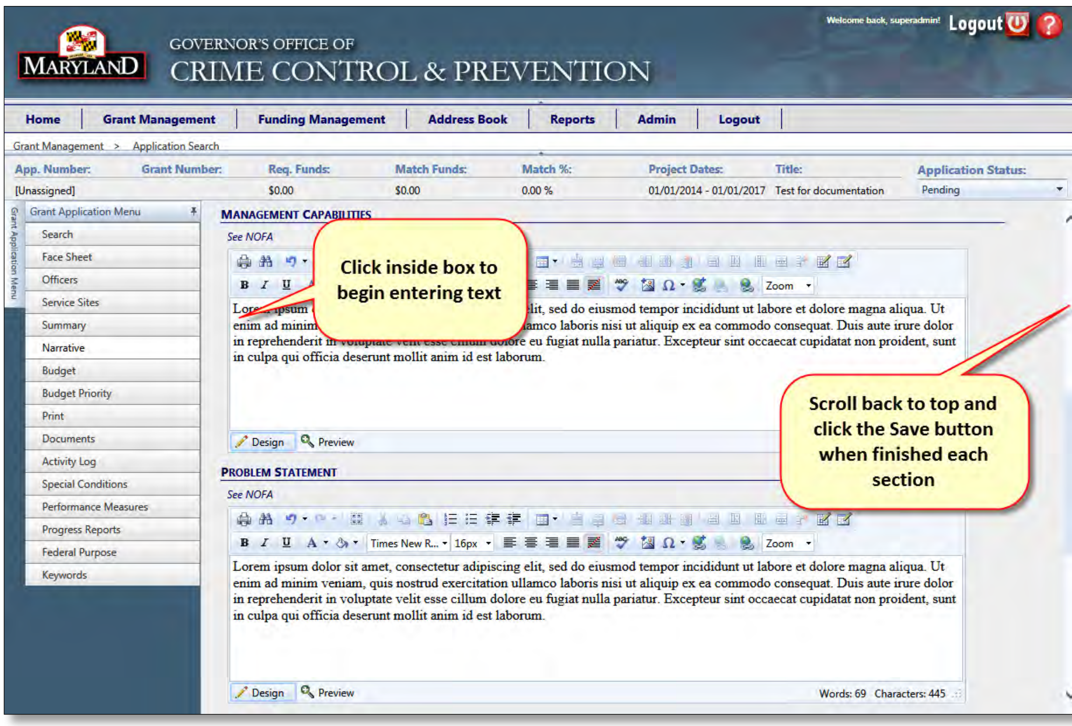


Figure 162 - Complete Narrative Sections in your application

4. Repeat Step 3 for each required Narrative Section. Be sure you've scrolled to the bottom and completed all sections. Remember to click the **Save** button after completing each section.

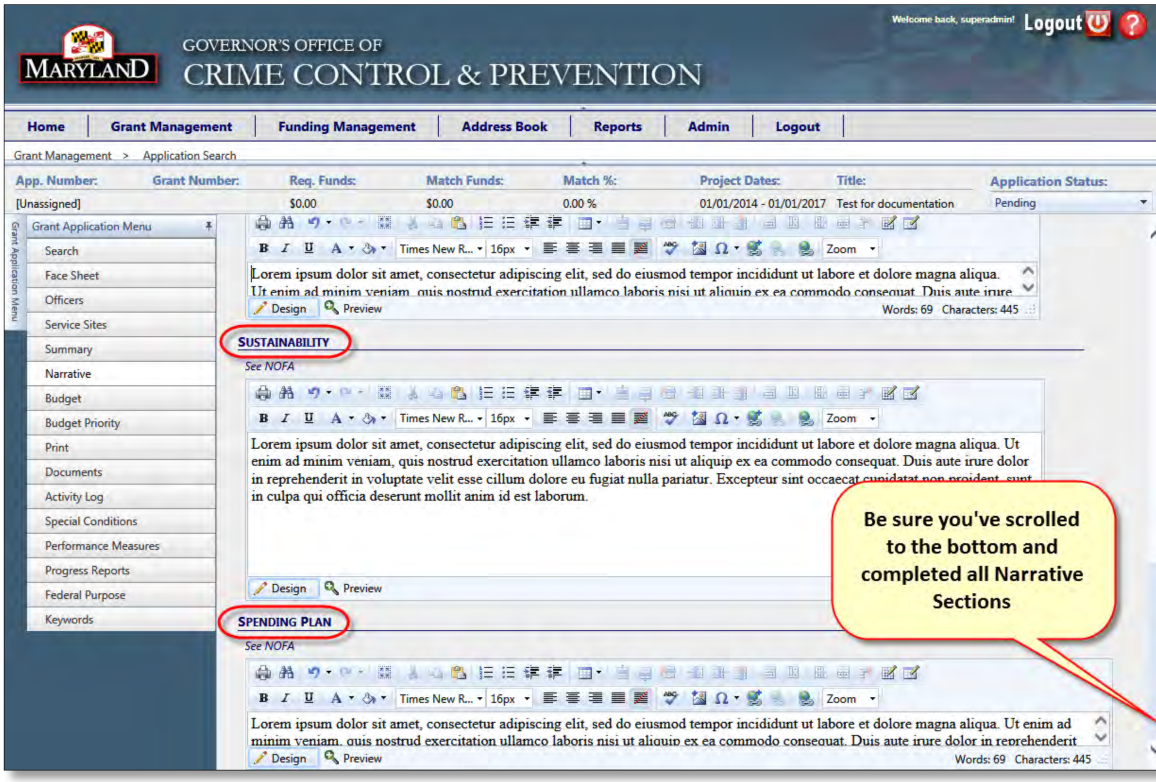


Figure 163 – Scroll to bottom to ensure all required sections are complete.

5. Finally, scroll back up to the top and click the **Save** button one final time to save your narratives.

7.3.1.9 Create Project Budget

A project budget must be included with every grant application. You must enter budget information into at least one of the following categories:

- Personnel
- Operating Expenses
- Travel
- Contractual Services
- Equipment
- Other

Note: Not all categories may be available (based on the parameter established in the NOFA).

The following procedure shows an example of creating a project budget containing a line item in the Personnel budget category and providing the related budget justification. Repeat this procedure for each category and line item associated with your proposed budget.

1. Click **Budget** in the Grant Menu.

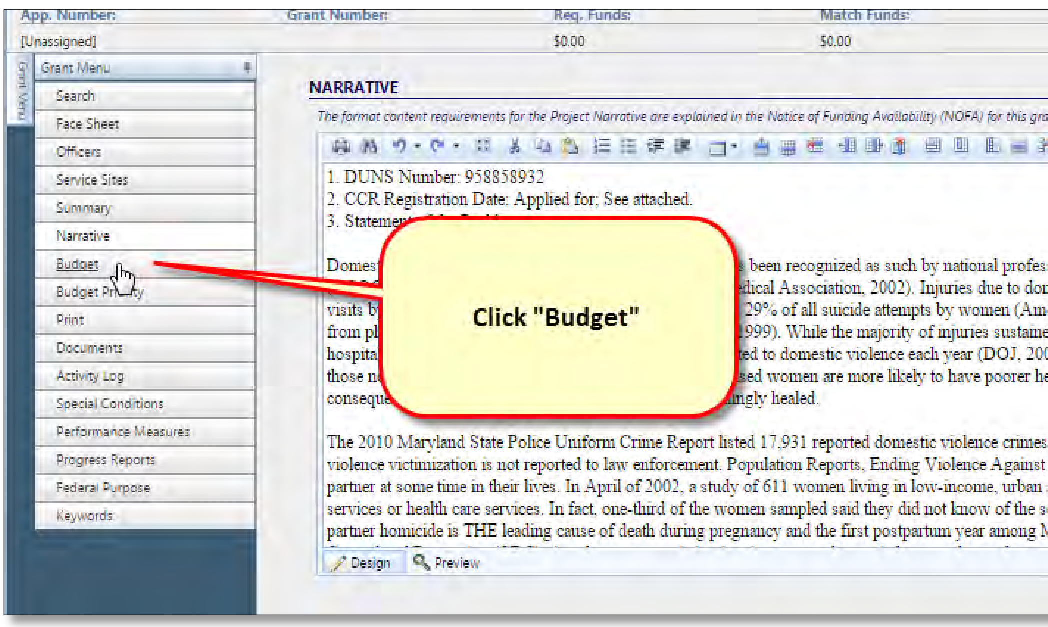


Figure 164 - Click Budget in the Grant Menu

2. The Original Grant Application Budget screen is displayed:

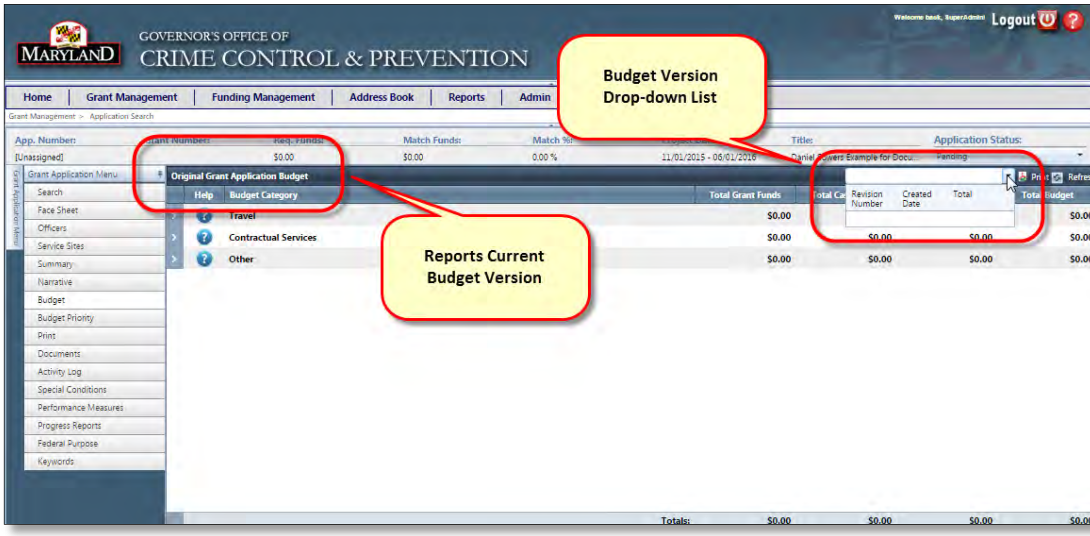


Figure 165 - Original Grant Application Budget Screen

Note two special areas of the Application Budget Screen: The current budget revision number is reported in the upper-left area of the screen. When entering a budget for the first time, this will read "Original Grant Application Budget". The second special area is the budget version drop-down list. If you've revised your original budget any number of times, you can select which version you want to view using this drop-down list. The budget version drop-down list is described in detail in section **7.3.3 - Add a Budget Revision**.

3. To begin entering your original project budget, click the **Expand** icon next to the Budget Category you want to add a new entry for. For this example procedure, click the **Expand** icon next to the **Personnel** Budget Category. Then click the **+** icon beside **Add New Record**.

Figure 166 - Expand Budget Category and Add New Record

4. Add the required information to the new Personnel record as described below.

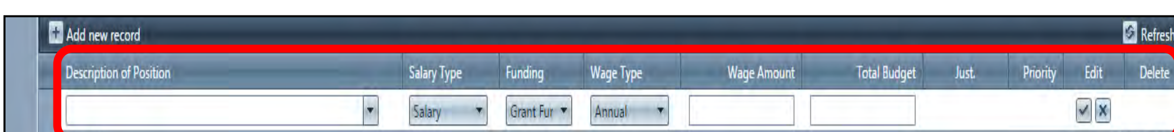


Figure 167 - Add Line Item Information

- **Description**: Briefly describe the person's role (for example: New Admin Assistant)
- **Salary Type**: Indicate whether the line item is considered Salary, Fringe, or Overtime
- **Wage Type**: Indicate whether the line item is Salary or Hourly
- **Funding**: Select the means by which the position will be funded – Grant Funds, Cash Match, or In-Kind Match.

The following provisions apply to match requirements:

⇨ The sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or

⇨ IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food)

⇨ Funds from other Federal sources may not be used to meet the match requirement.

⇨ Funds or in-kind resources used as match must be directly related to the project goals and objectives.

⇨ Sub-recipients must maintain records which clearly show the source, the amount, and the timing of all matching contributions.

⇨ Sources of match are restricted to the same requirements as funds allocated under the federal program and must be documented in the same manner as federal program funds, including financial and programmatic reports.

- **Annual Salary: Enter the annual salary for the position. If it is an hourly position, you must annualize it to calculate the annual salary and enter it here.**
- **Requested Amount: Enter the amount of funds you are requesting for this resource.**

5. Click the **Checkmark** below **Edit** to add the new line item to the Personnel budget category. If you click the **X** button instead, the information you entered for this line item will be lost and you will be returned to the Original Grant Application Budget screen.

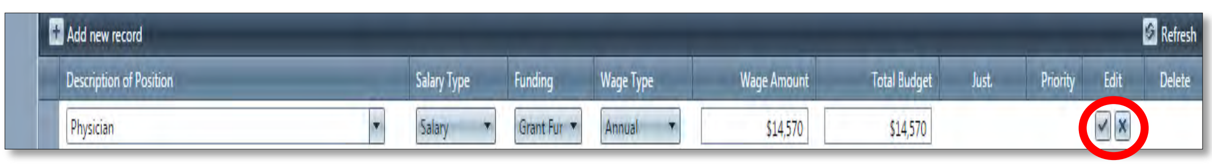


Figure 168 - Save new budget line item

6. After your new line item is saved, you are returned to the Original Grant Application Budget window:

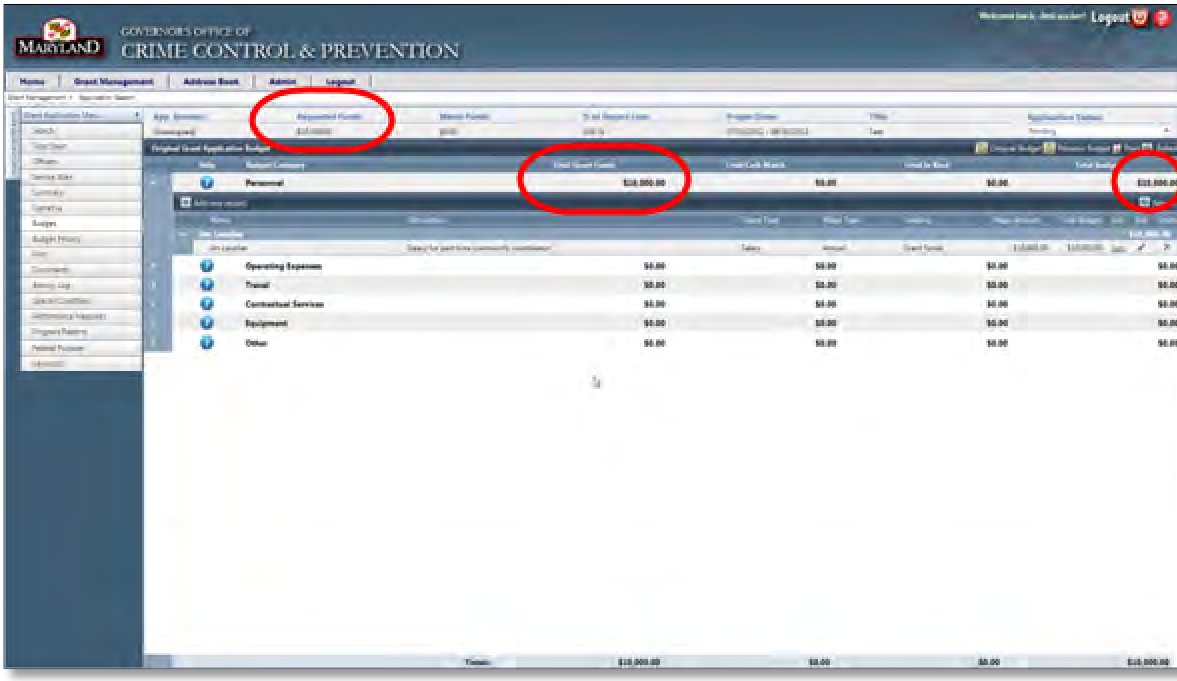


Figure 169 - Budget Totals Updated based on New Line Item

The following budget amounts are updated to reflect the newly added line item:

- Budget Category Total for each Match Type
- Total of all Categories for each Match Type
- Total Project Budget

7. Repeat Steps 4 -7 for each budget entry you wish to make (expand category, add new record, enter line item information, and save the entry).

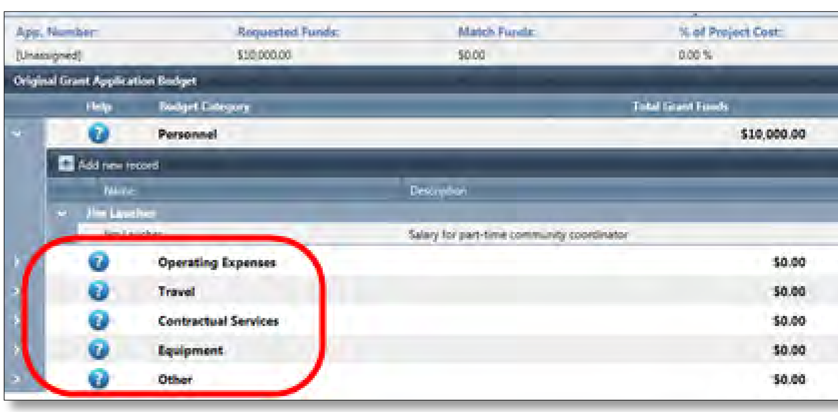


Figure 170 - Repeat Add New Record for each Budget Item

8. Budget totals are updated every time you save a new line item.

NOTE: While your new budget is saved, you must provide a justification for each entry in order to submit your application, as described in the following section.

7.3.1.10 Create Project Budget Justifications

In the previous section, we created a budget revision and added a line item within the Personnel budget category. To provide a justification for that item, do the following:

1. Click the **Expand** icon next to Personnel.

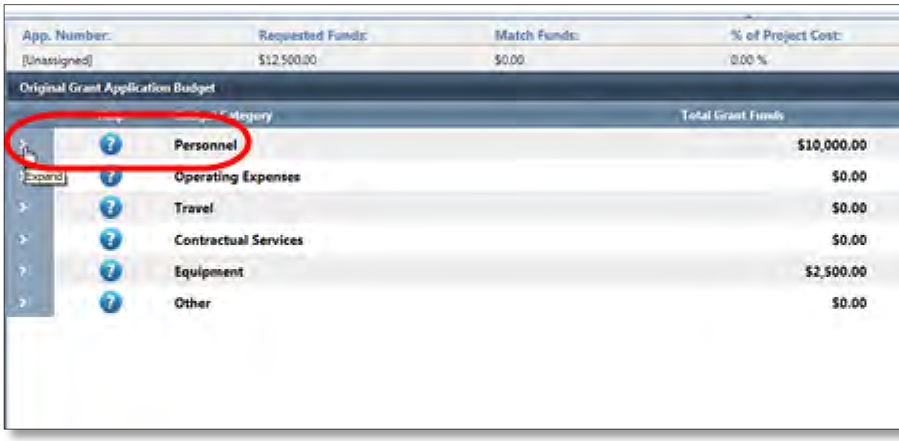


Figure 171 - Add Budget Line Item Justification - Expand Record

   Records within the category are expanded automatically, and the line item you added is shown.

2. Click on the **Just** link next to the pencil icon to display the text box that you'll use to add your budget item justification.

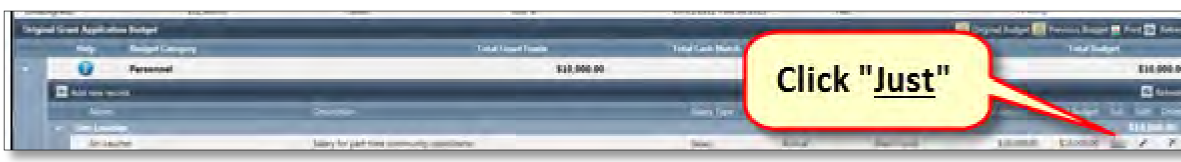


Figure 172 - Click JUST to Enter Line Item Justification

3. Click in the **Justification text box** and type in the justification for the specific budget item you just added, then click the **Save** button.

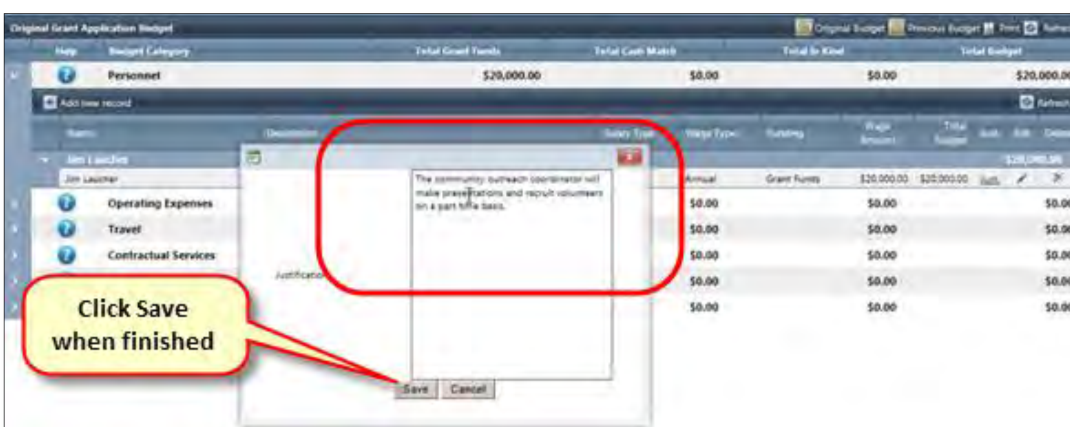
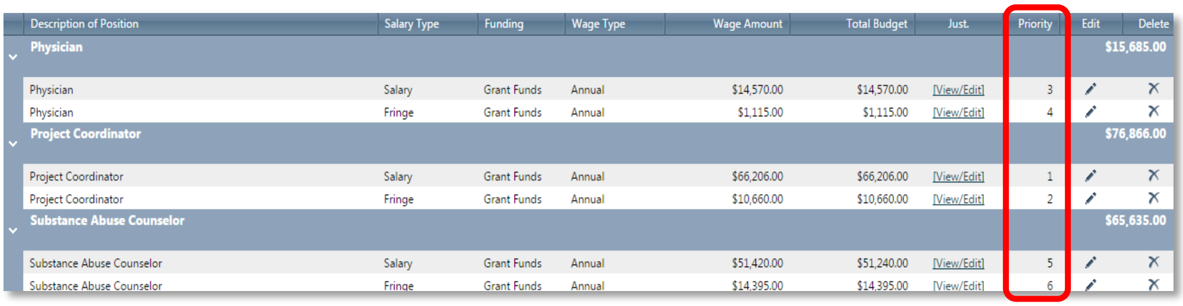


Figure 173 - Type in justification and hit Save

4. Repeat this procedure to add a justification to every budget line item you created in your new budget revision.

5. After creating a new budget revision, adding all required line items, and providing a justification for each line item, proceed to the next steps to complete and finalize the application.

Budget Priority



Description of Position	Salary Type	Funding	Wage Type	Wage Amount	Total Budget	Just.	Priority	Edit	Delete
Physician									**$15,685.00**
Physician	Salary	Grant Funds	Annual	$14,570.00	$14,570.00	[View/Edit]	3		
Physician	Fringe	Grant Funds	Annual	$1,115.00	$1,115.00	[View/Edit]	4		
Project Coordinator									**$76,866.00**
Project Coordinator	Salary	Grant Funds	Annual	$66,206.00	$66,206.00	[View/Edit]	1		
Project Coordinator	Fringe	Grant Funds	Annual	$10,660.00	$10,660.00	[View/Edit]	2		
Substance Abuse Counselor									**$65,635.00**
Substance Abuse Counselor	Salary	Grant Funds	Annual	$51,420.00	$51,240.00	[View/Edit]	5		
Substance Abuse Counselor	Fringe	Grant Funds	Annual	$14,395.00	$14,395.00	[View/Edit]	6		

Figure 174 – Line Items will be prioritized as you enter them

While creating your budget, you will notice there is a section that shows a Priority Number. The system will automatically generate a number for each record that you enter into the system.

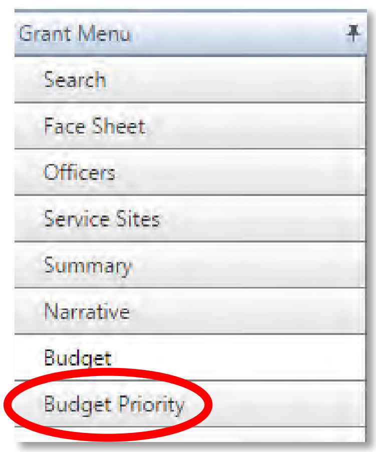
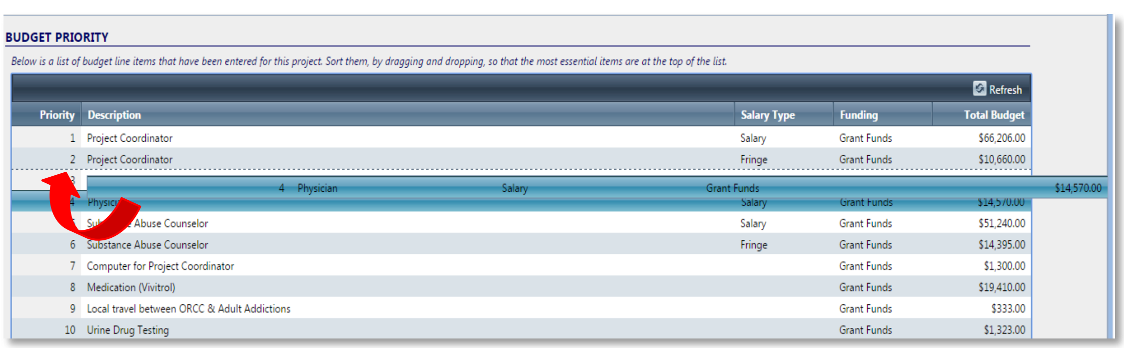


Figure 175 – Select Budget Priority from the Grant Menu

1. Once the budget has been completed, under the Grants Menu, you can select "Budget Priority" and prioritize your line items from your budget.



BUDGET PRIORITY

Below is a list of budget line items that have been entered for this project. Sort them, by dragging and dropping, so that the most essential items are at the top of the list.

Refresh

Priority	Description	Salary Type	Funding	Total Budget
1	Project Coordinator	Salary	Grant Funds	$66,206.00
2	Project Coordinator	Fringe	Grant Funds	$10,660.00
3				
4	Physician	Salary	Grant Funds	$14,570.00
4	Physic	Salary	Grant Funds	$14,570.00
	Abuse Counselor	Salary	Grant Funds	$51,240.00
6	Substance Abuse Counselor	Fringe	Grant Funds	$14,395.00
7	Computer for Project Coordinator		Grant Funds	$1,300.00
8	Medication (Vivitrol)		Grant Funds	$19,410.00
9	Local travel between ORCC & Adult Addictions		Grant Funds	$333.00
10	Urine Drug Testing		Grant Funds	$1,323.00

Figure 176 – Select Budget Priority from the Grant Menu

2. From this section, you will be able to move the line items around from the most important to the least important. To do this, you will simply click on the line item and drag it to the proper location.

7.3.1.11 Finalize Grant Application

To summarize, the grant application process up to this point included the following tasks:

1. Create Application
2. Complete Project Face Sheet
3. Assign Officers
4. Add Additional Service Sites (if applicable)
5. Add Project Summary
6. Add Project Narrative
7. Create Project Budget and Justifications
8. Sort and Prioritize your Budget Line Items

Finalizing a grant application includes tasks you perform using GMS and those you will perform manually, as follows:

1. Attach Documents to the Application (Optional)
2. Upload a valid SAM.gov screenshot if applying for Federal GFD
3. Upload a 501(c)3 document if non-profit (religious or non-religious)
4. Review and Revise Application Prior to submitting it electronically in GMS
    a. Generate a Draft (Pending Submission) Hardcopy
    b. Review Draft Hardcopy
    c. Revise Application in GMS if changes are required
    d. Repeat a) through c) if necessary
5. Submit Application Electronically using GMS
6. Prepare and Deliver Hardcopy of Application
    a. Print Hardcopy of Application using GMS
    b. Collect Proper Signatures
    c. Make Appropriate Number of Photocopies (as required by the NOFA)
    d. Deliver Application Hardcopy to GOCCP

The tasks above that you perform in GMS are described in the following sections.

7.3.1.11.1 Attach Documents to Grant Application

1. Click **Documents** in the Grant Application Menu to the left of the screen.

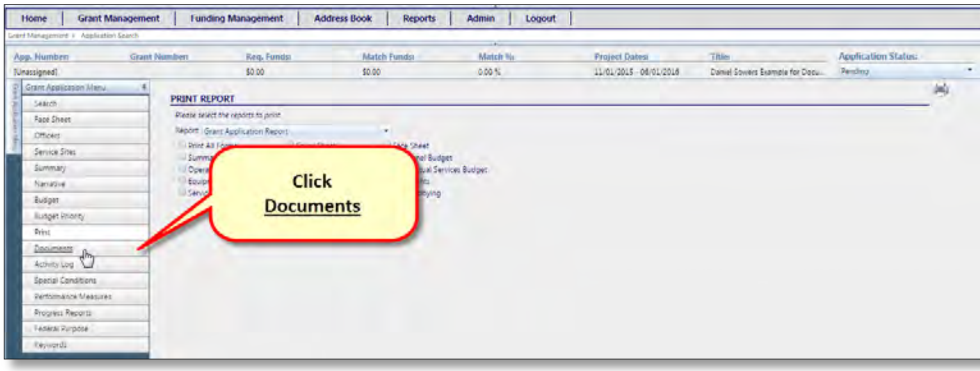


Figure 177 - Access Documents in Grant Application Menu

2. Click the **Add New Record** icon to display the data entry screen.

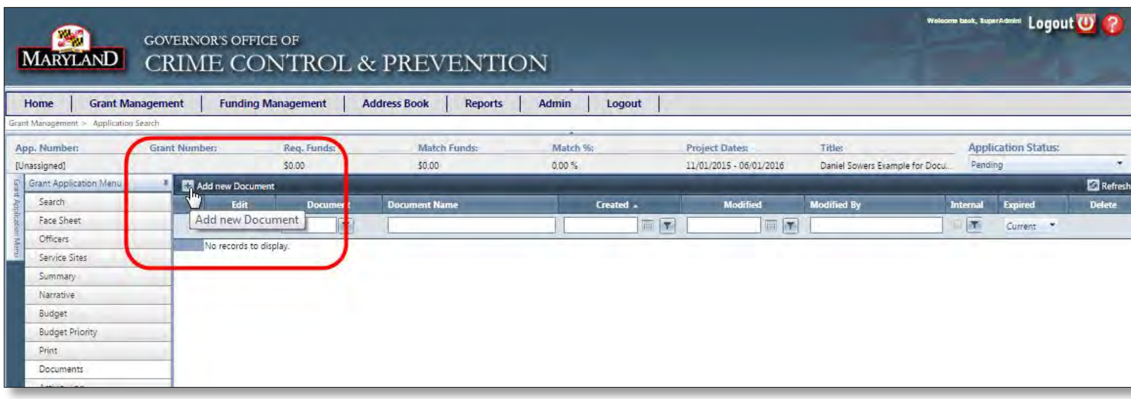


Figure 178 – Add New Document Record to Grant Application

Clicking Add New Record brings up the new document data entry screen:

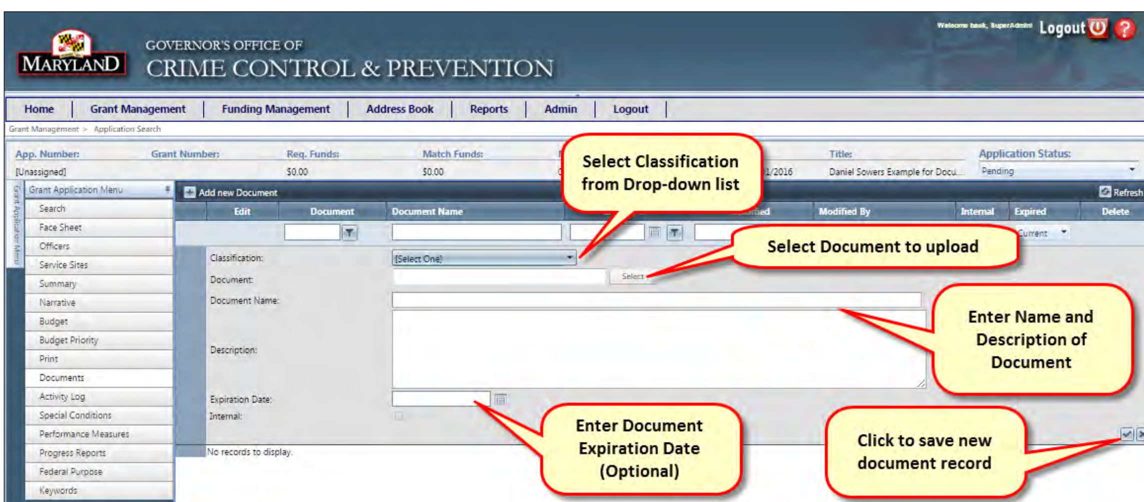


Figure 179 – New Document Data Entry Screen

3. Select a classification for the document from the Classification drop-down list.

4. Click the Select button beside the Document field. This brings up a standard dialog box that allows you to search for the document on your hard disk and select it. If your computer runs the Microsoft Windows 7 operating system, the dialog will appear similar to the following figure:

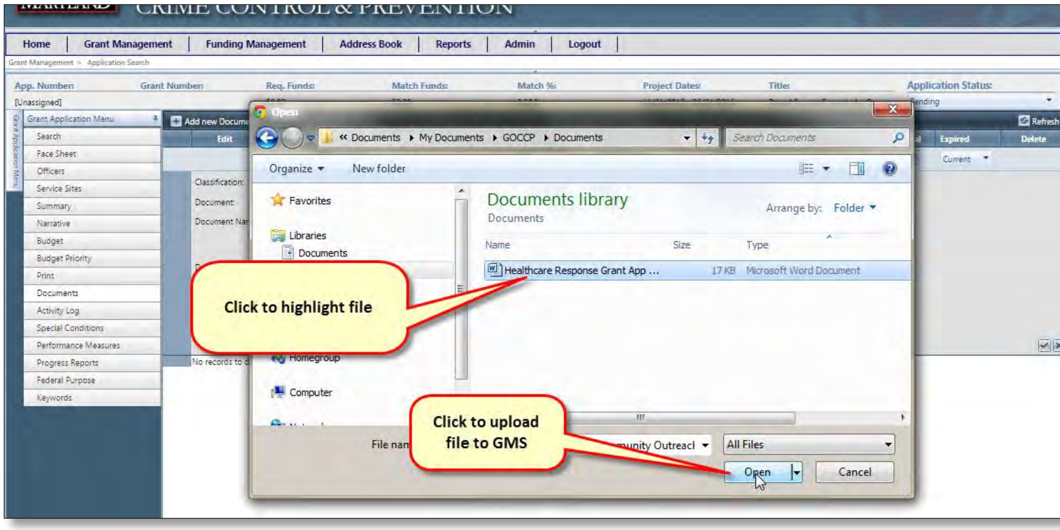


Figure 180 – Select File from Computer to Upload to GMS

- Browse your computer for the file you wish to upload. When you locate the file, click on it to highlight it, then click the Open button to upload the file to GMS.
- If your computer is running a different operating system, the dialog box may appear differently – you would still just browse for the file and select it to upload it.

After you select the document to upload, you are returned to the Data Entry screen and the document you uploaded is listed next to the Document label. Complete the remaining fields as follows:

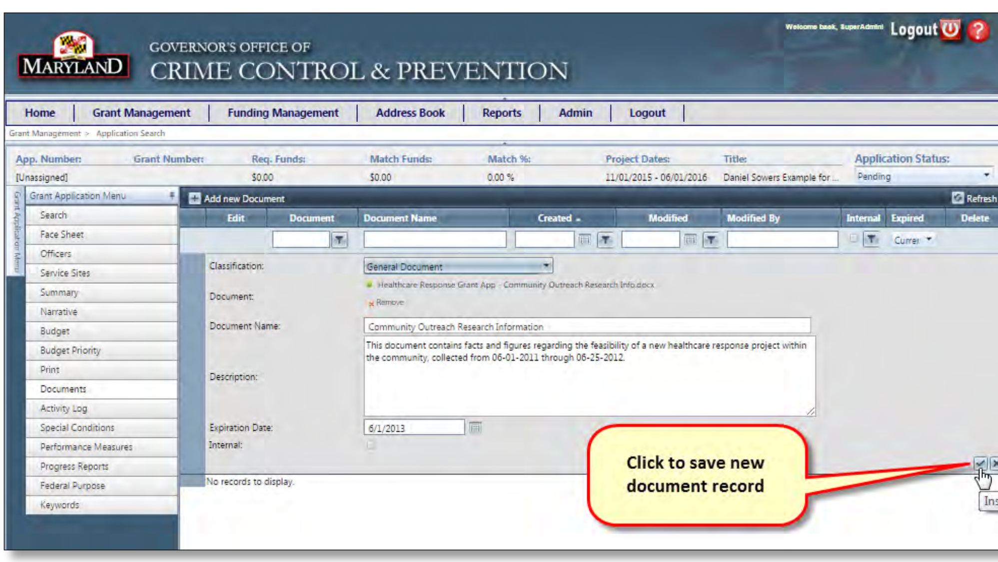


Figure 181 – Complete Remaining Data Entry

5. Type a descriptive name for the document in the Document Name field.
6. Type a detailed description of the document into the Description field.

7. If applicable, add a date that the document will no longer be available. Either click the calendar icon next to the Expiration Date field and choose a date by clicking on it, or type the date directly into the Expiration Date text field in the format MM/DD/YYYY (ex. 05/01/2013).
8. (Accessibility based on permission) Click to place a checkmark in the Internal checkbox to mark the document as Internal (GOCCP user only).
9. Click the checkmark icon to the lower left of the screen to upload and save the document to the Funding Program. If you click on the cancel icon (X), the document will not be uploaded or saved and you'll be returned to the previous screen. The newly added document is now displayed in the Documents list:

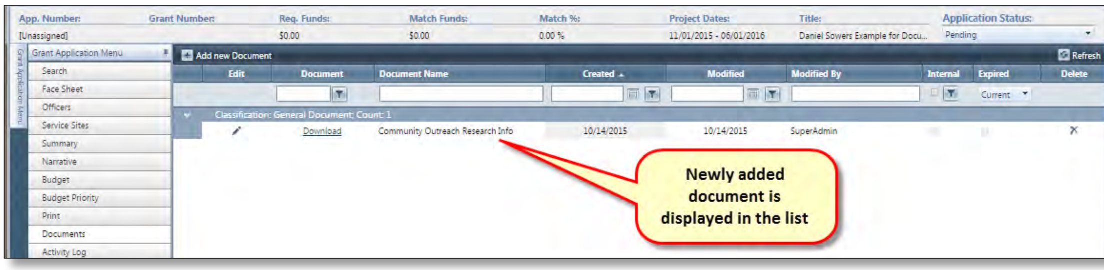


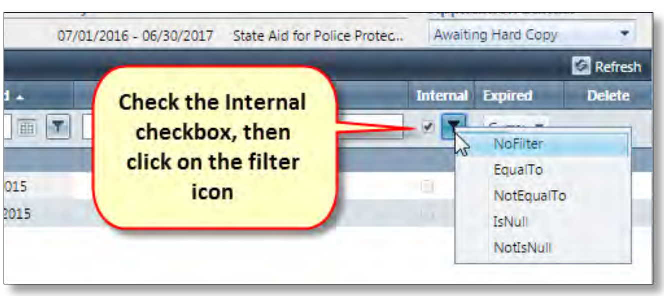
Figure 182 – New Document Record Displayed in List

7.3.1.11.1.1.1 Internal / External Documents

When documents are uploaded to GMS, they can be marked as Internal (see step 8 in prior procedure). Doing so will ensure that only GOCCP personnel can see the document. If a document is not checked as Internal, it is External by default and can be seen by whoever is viewing the application or award.

When viewing a list of documents, you can use the Filter in the Internal column to determine how you want to see internal or external documents:

1. When viewing the documents list, first click to place a check in the checkbox next to the filter in the Internal column heading. Then click the filter icon.



2. The filter allows you to specify how you want to view internal documents. Select:
    a. EqualTo to show you every document that is checked as Internal
    b. NotEqualTo to show you every document that is **not** checked as Internal

7.3.1.11.1.1.2 Expired Documents

When a document is added to a grant award it can be assigned an expiration date. When viewing the list of documents for a grant award, you can apply a filter to view all documents, only current documents (documents that are not yet expired) or expired documents only.

To use the Expired filter:

1. Click the arrow on the drop-down list in the Expired column:

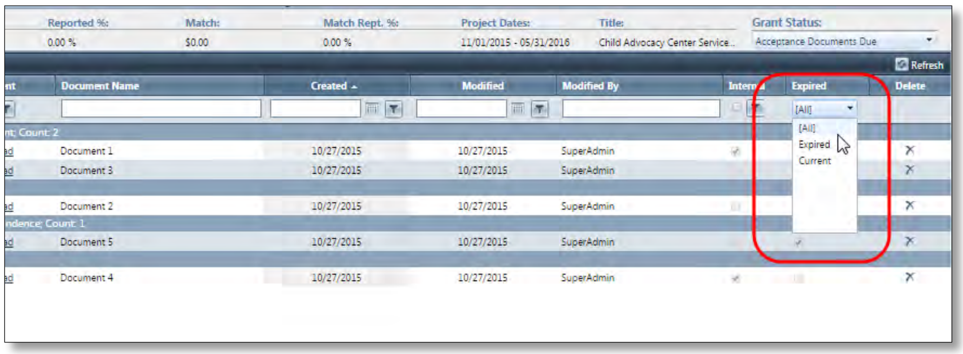


Figure 183 – Select Expired/Current

a. Click **All** to view all documents regardless of their expiration status.

b. Click **Expired** to view only expired documents. A checkmark will appear in the checkbox in the Expired column and only expired documents will be displayed.

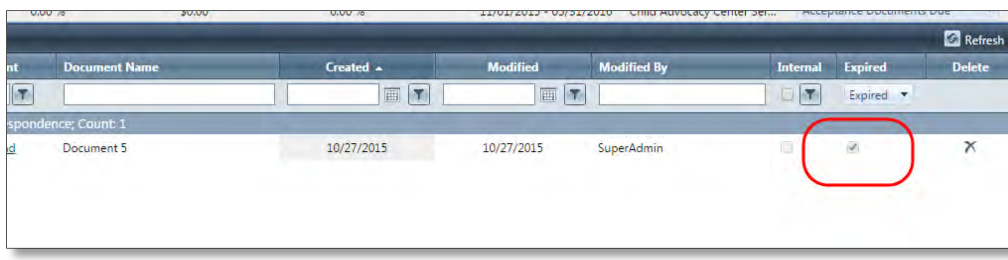


Figure 184 – Expired Checkbox

c. Click **Current** to view only documents that are not expired:

Figure 185 – Use Current to view only documents that are not expired.

7.3.1.11.2 Upload SAM.gov Screenshot if applying for Grant based on a Federal GFD

If you are applying for a grant based on a Federal GFD, you must :

- Show proof of a SAM.gov screenshot document by uploading it to the documents section of your application.

- Ensure that the document is dated correctly with regard to the application proposed start date (screenshot document expiration date is equal to or after the application start date.

To upload your SAM.gov screenshot:

1. Bring up the Face Sheet for your grant application
2. Make a note of the Project Dates -> Proposed Start Date

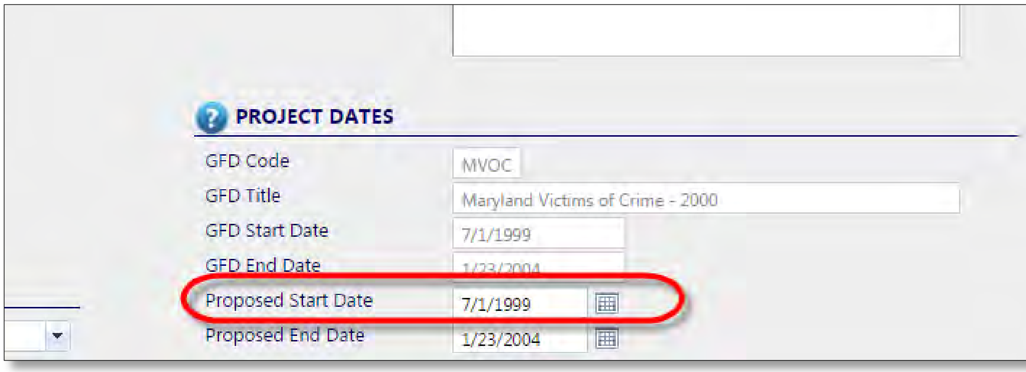


Figure 186 – Make a Note of the Proposed Start Date

3. Click on the **Documents** tab in the **Grant Application Menu**.

Figure 187 – Click the Documents Tab

4. Click on **Add new Document**.

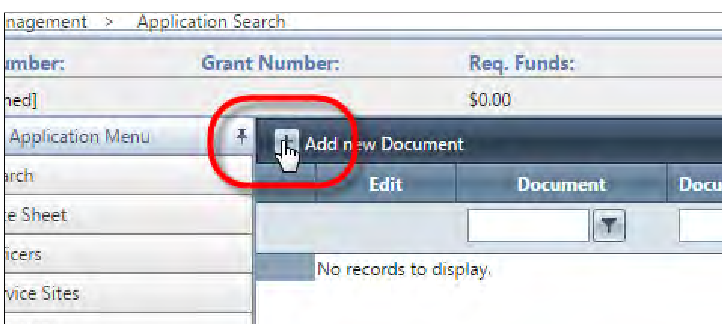


Figure 188 – Click Plus Sign Icon for Add new Document

5. Select **SAM.gov Screenshot** from the **Classification** drop-down menu.

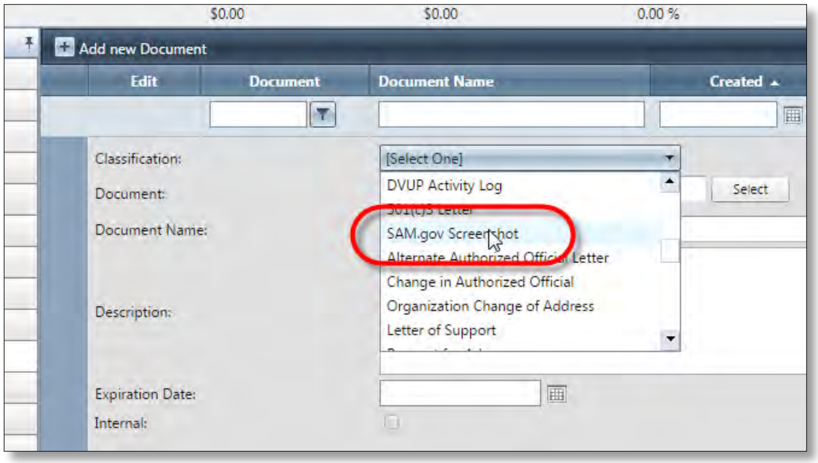


Figure 189 – Select SAM.gov Screenshot

6. Click the **Select** button and choose the SAM.gov screenshot from your computer.

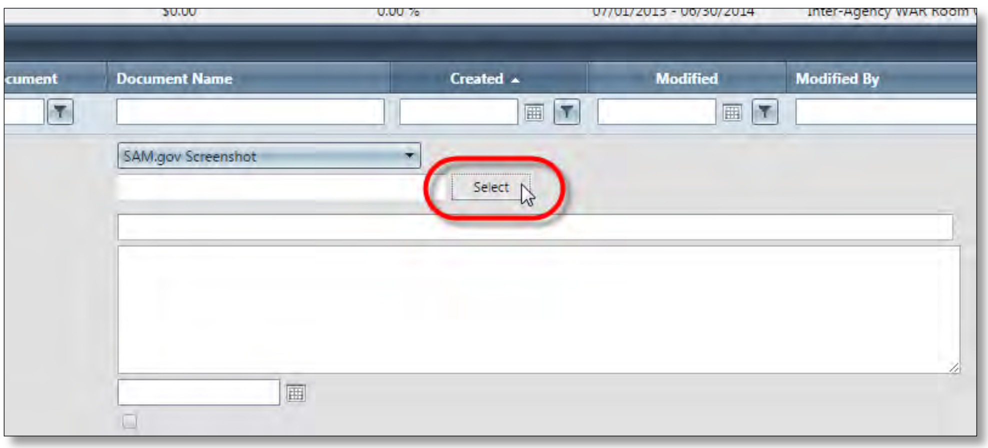


Figure 190 – Click the Select Button

7. Enter the name of the file you uploaded in the **Document Name** field and a description of the document in the **Description** field. Finally, enter the expiration date of the document in the **Expiration Date** field. Note: as described in step 2, this date must be equal to or after the project start date.

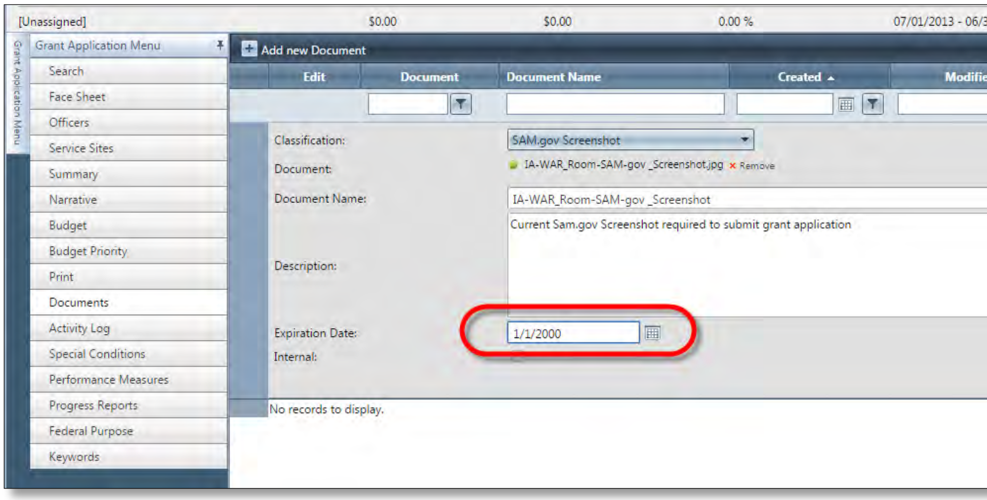


Figure 191 – Enter Document Name, Description, and Expiration Date

8. When complete, click on the checkmark icon to save the document record.

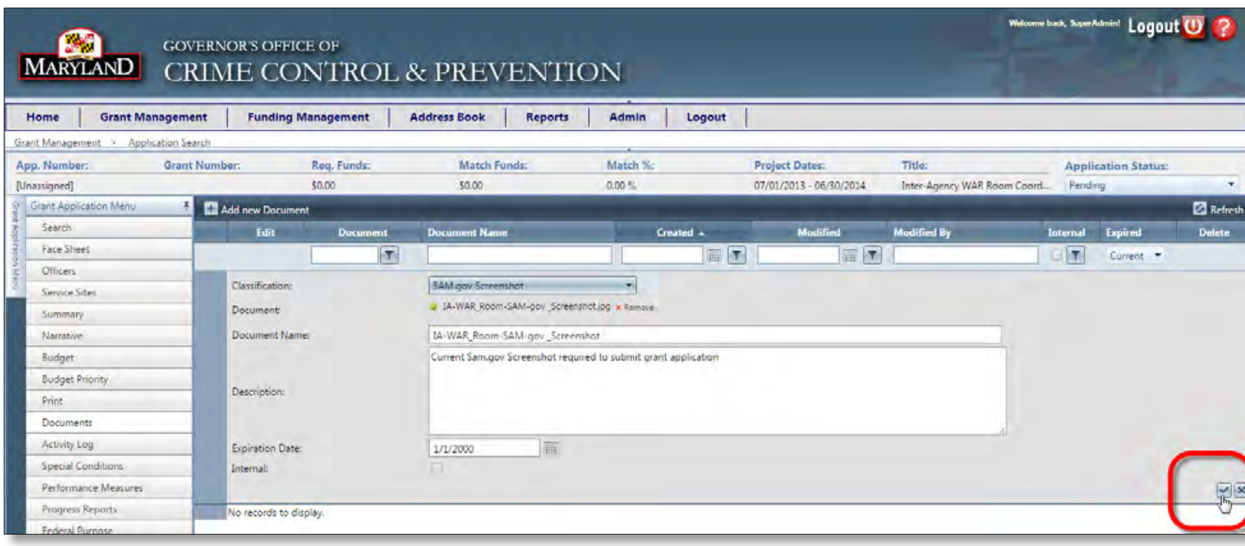
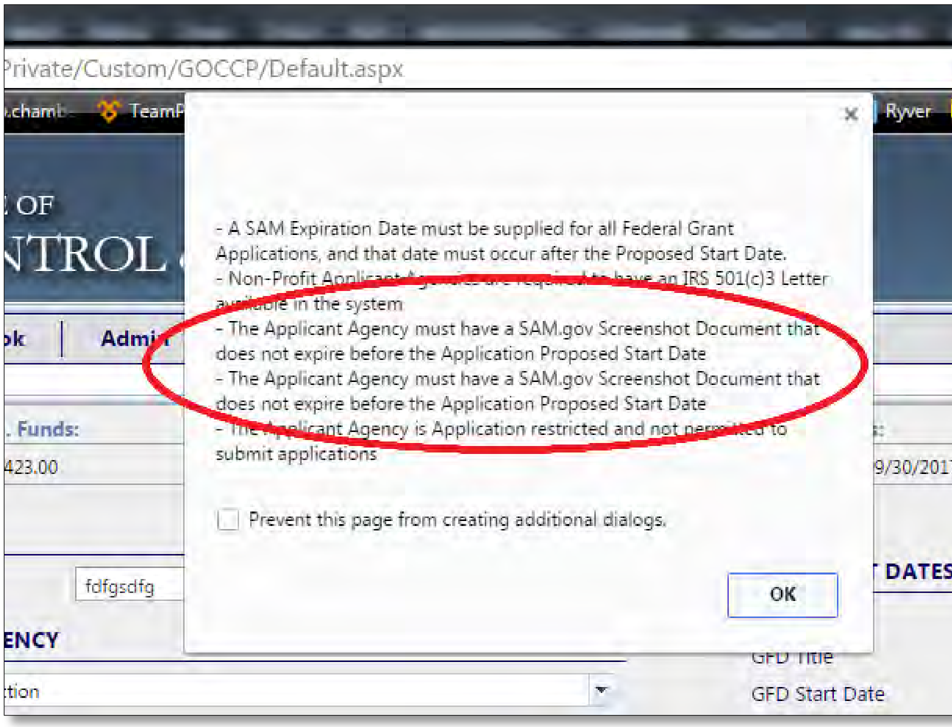


Figure 192 – Click Checkmark Icon to Save Document Record

9. **NOTE:** If you are required to upload a SAM.gov screenshot and you do not, or if you do upload the screenshot but the **Expiration Date** you enter is prior to the proposed start project date, you will receive an error message and will not be able to proceed until you correct the problem (upload a valid screenshot, correct the expiration date).



7.3.1.11.3 Uploading a 501(c)3 Letter (if non-profit)

If your applicant agency is a non-profit – religious or non-religious – you must upload a valid 501(c)3 letter to your application, as follows:

1. Bring up your grant application in GMS – it will default to the Face Sheet.
2. Click on **Documents** in the Grant Menu.

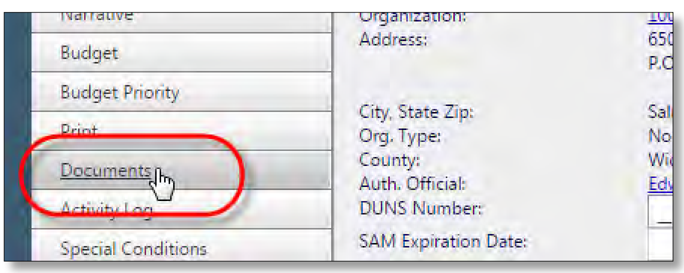


Figure 193 – Click Documents in the Grant Menu

3. Click on **Add new Document**.

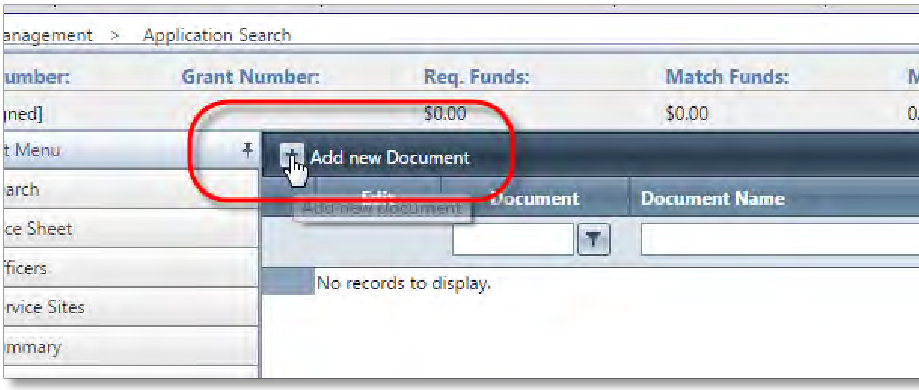


Figure 194 – Click the Plus Sign Icon to Add new Document

4. Select **501(c)3 Letter** from the **Classification** drop-down menu.

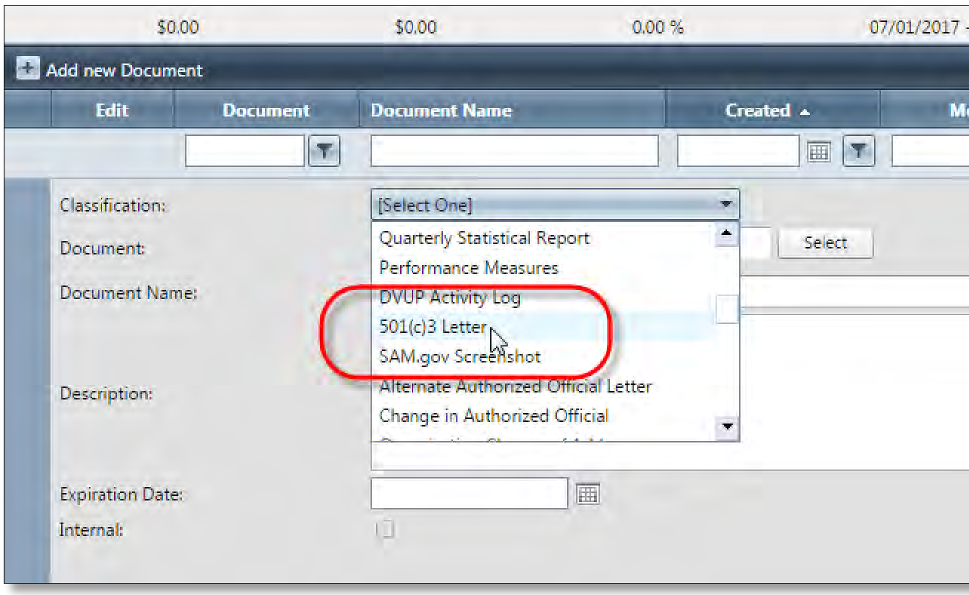


Figure 195 – Select 501(c)3 Letter

5. Click the **Select** button and choose the letter you wish to upload from your computer.

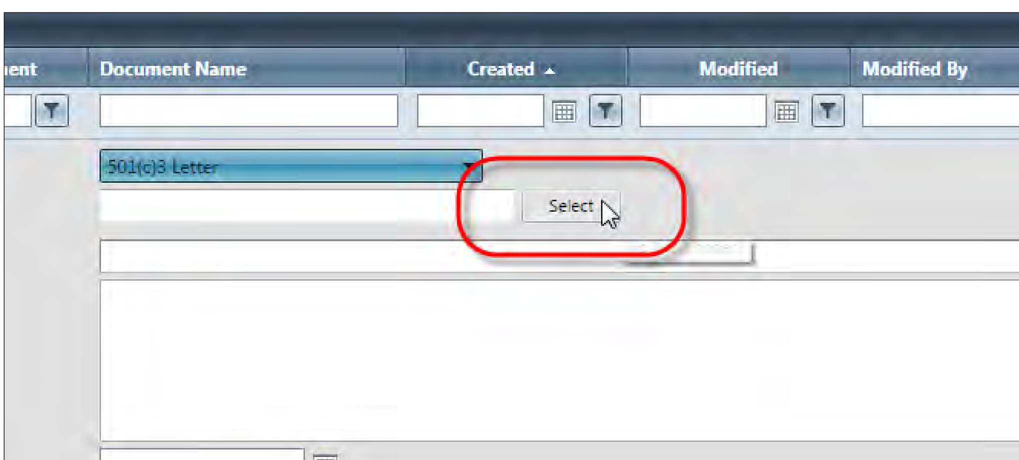


Figure 196 – Click the Select Button to Choose Letter to Update

6. By default, the name of the document you upload is entered into the **Document Name** field.
7. Enter a description of the letter in the **Description** field, and the date that the letter expires in the **Expiration Date** field, then click the checkmark icon to save the document record in GMS.

Figure 197 – Enter Document Name, Description, Expiration Date, and Internal/External

7.3.1.11.4 Generate and Review a Draft (Pending Submission) Hardcopy of the Grant Application

Hardcopies generated *before completing electronic submission* say "Pending Submission" and will not be accepted by GOCCP. Use this hardcopy of the application as a review tool. After you electronically submit the application, you can generate and print a final hardcopy, which you will deliver to the GOCCP manually.

1. Use the instructions in this section to generate a *draft* hardcopy of your complete application in PDF format.
2. Print the hardcopy or view the PDF on your computer and review it for completeness. If you notice incomplete or incorrect information, edit the relevant section of the application using the instructions in Sections **Error! Reference source not found.** through **Error! Reference source not und.**.
3. Repeat the first two steps until the application is complete and all the information is correct. At this point you can proceed to the next section and electronically submit the application.

To generate a draft hardcopy of your grant application in PDF format:

1. Click **Print** in the Grant Application Menu.

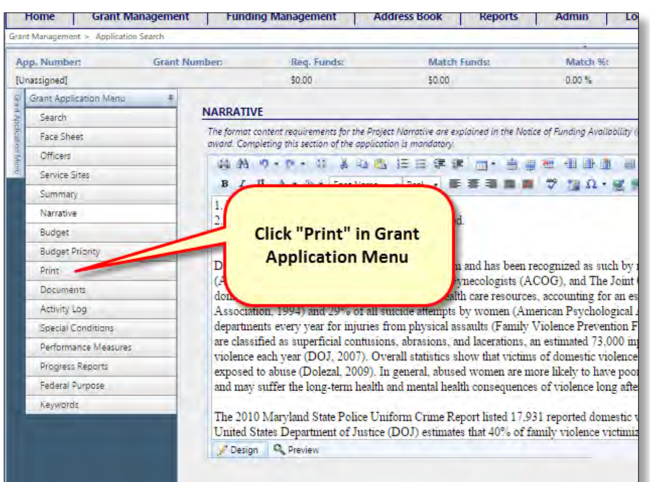


Figure 198 – Access Print from Grant Application Menu

2. Click the **Report** drop-down list arrow and select the report you want to print.

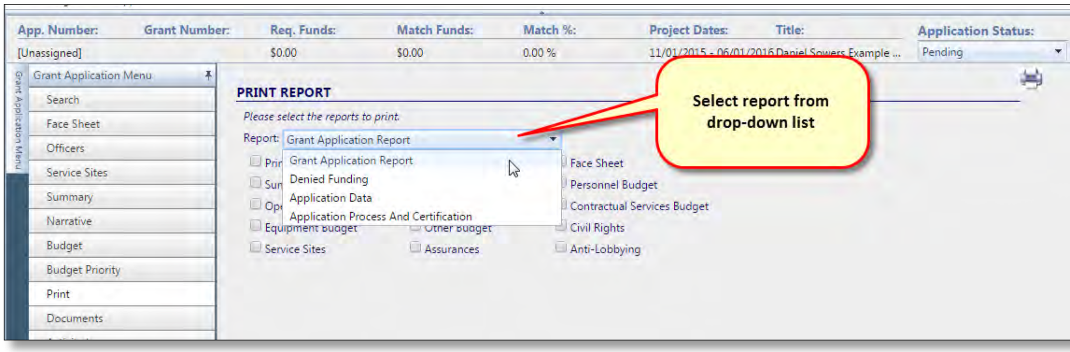


Figure 199 – Select Report from Drop-down List

3. The "Grant Application Report" is a complete report of your application and contains several forms. Click in the checkbox beside each form you wish to be included in the report, or click in the checkbox beside "Print All Forms" to select all forms automatically.

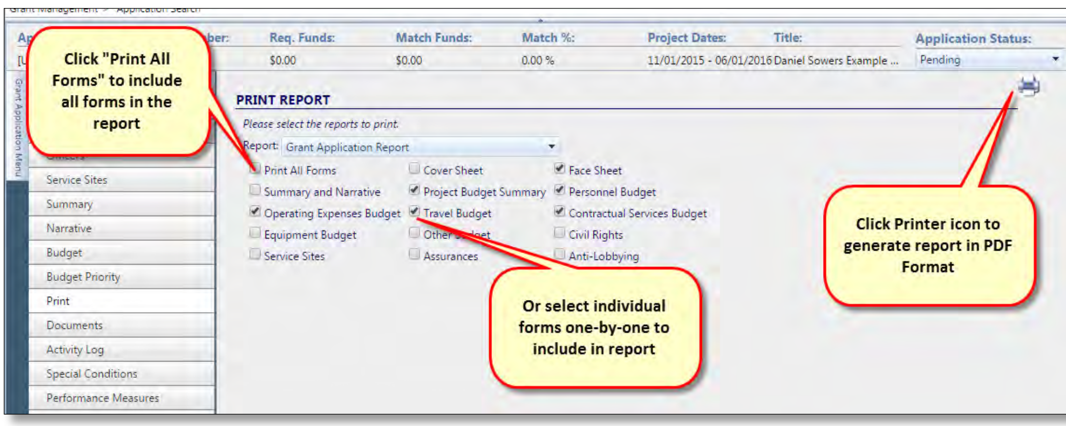


Figure 200 – Select Forms to Include in Report

4. Click on the **Printer icon** to generate a report containing the items you selected.

5. If you are using Microsoft Internet Explorer, a dialog box will appear at the bottom of the browser when the report is ready:

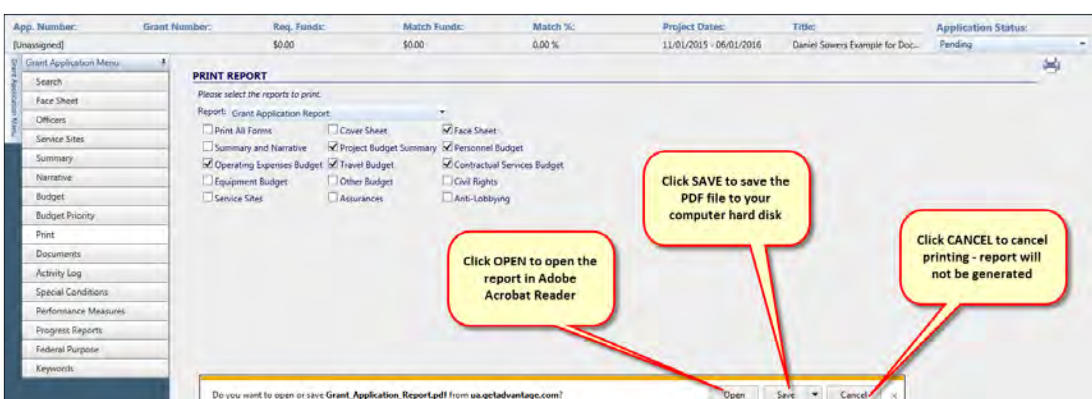


Figure 201 – Select Forms to Include in Report

- Click OPEN to view the report in Adobe Acrobat Reader, click Save to save the PDF file to your computer hard disk, or click CANCEL to cancel generation of the report.
- If you use a different browser, you will still have the same options, but they may be presented differently.

6. If you selected OPEN, the report will now be displayed in Adobe Acrobat Reader:

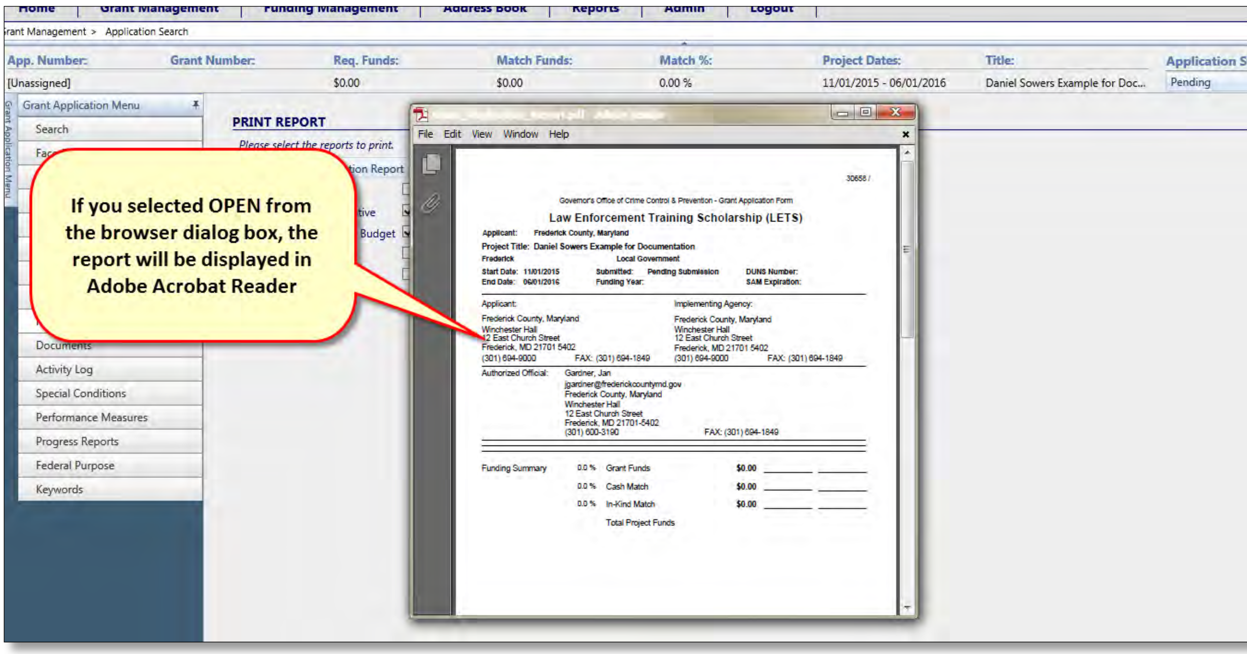


Figure 202 – Select Forms to Include in Report

Review your Grant Application

Be sure to carefully review all of the forms you printed as part of your application.

In addition to checking it for completeness, ensure that contact names and addresses, email addresses, and signature lines are all present and correct. Often when any of these items are missing or incorrect, it means your user ID or other contact information may have not been set up correctly in GMS. For example:

- If the name of the Authorized official is missing from the signature line of the Assurances or Anti Lobbying forms, then an Authorized Official must be assigned to the Organization. Select Address Book, Organizations, Edit Organization, and use the drop down list to select an Authorized official (refer to Section Navigating GMS for further instructions if necessary). The application report will now include the name of the Authorized Official.
- If the email or address in a letter is missing, then your contact information in the GMS address book needs to be updated.
- If you (or your implementing agency) address is missing, then your organization’s information needs to be updated in the GMS address book.
- If you notice any of these issues with your reports, please contact GMS support to have your information updated or corrected.

If you notice incomplete or incorrect information, edit the relevant section of the application using the instructions in Sections **Error! Reference source not found.** through **Error! Reference source not found.** cessible via the Grant Application Menu:

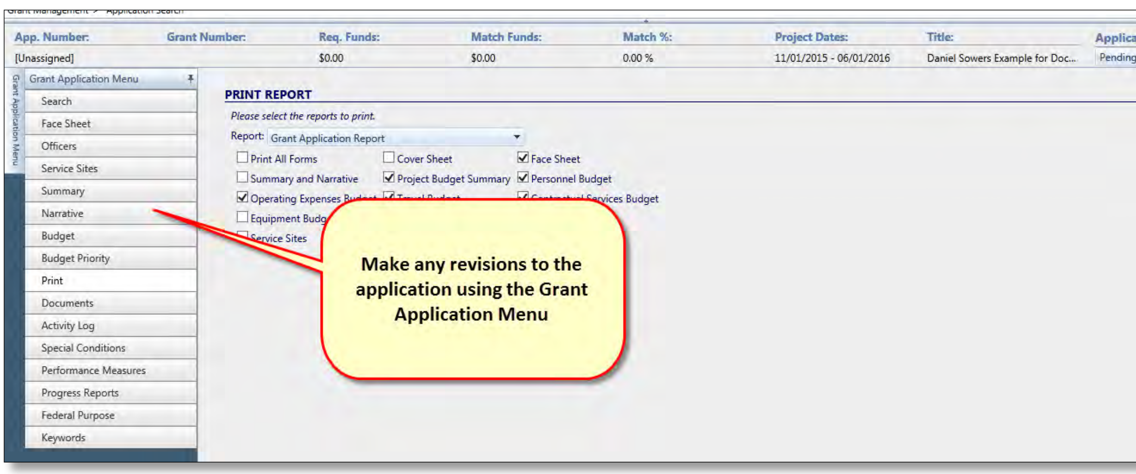


Figure 203 – Make Revisions using the Grant Application Menu

You can print a draft grant application report at any time after making revisions. When you have completed the application, proceed to the next step and electronically submit the application.

7.3.1.11.5 Electronically Submit Grant Application to GOCCP

1. Submit your application to GOCCP by clicking in the Status drop-down list and selecting **Submit Application**.

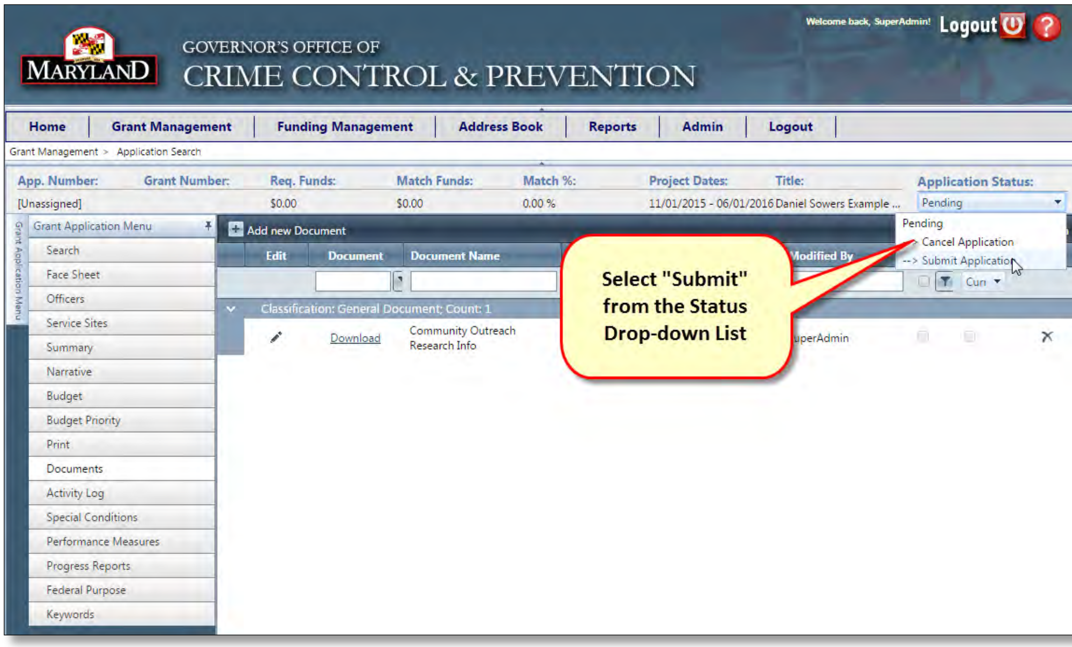


Figure 204 - Submit Application to GOCCP by Changing Status to Submit Application

2. The Submit Application process validates rules to make sure all required fields are completed and correct.
3. If validation fails, a list of required fields will display indicating what needs to be completed in Grant Application
4. When validation is successful, the status will change to "Application Submitted" and a message is displayed to confirm that your application has been submitted.

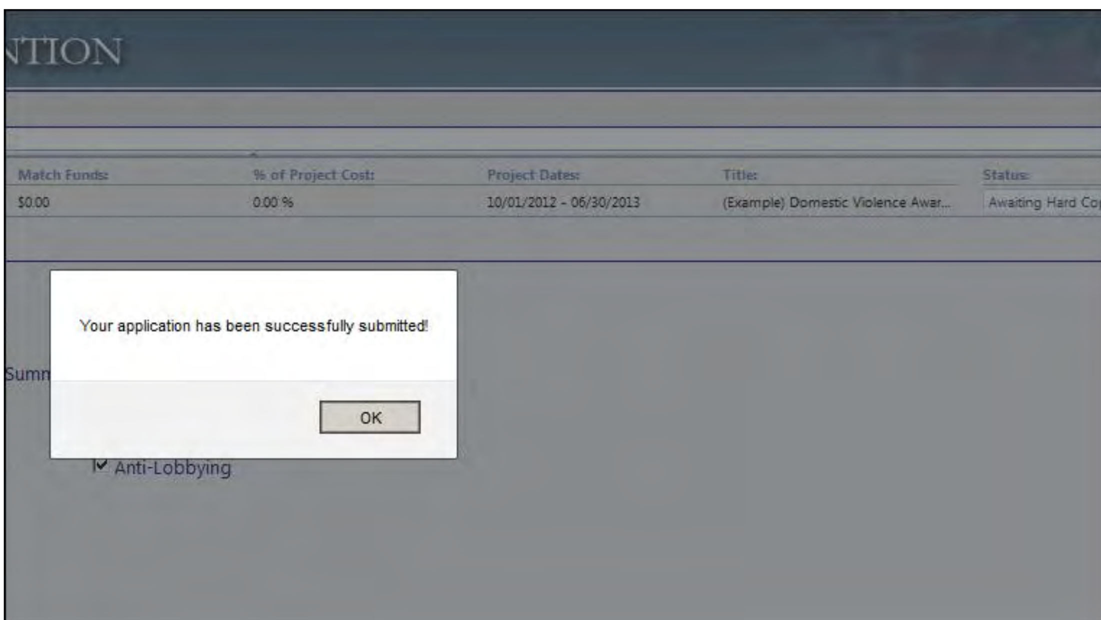


Figure 205 - Submission Confirmation Message

5. Click the OK button in the submission confirmation dialog box, which will bring you directly to the Print screen where you can print the final hardcopy which you will deliver to GOCCP manually, as described in the following section.

7.3.1.11.6 Prepare and Deliver Hardcopy of Application

When you generate a report after successfully submitting the application in GMS, the report will no longer contain the text "Pending Submission", and can be delivered to GOCCP in hardcopy format. Refer to the instructions in Section **Error! Reference source not found.** for printing your hardcopy report. To omplete the application process:

- Collect Proper Signatures (have the Authorized Official for the Applicant Agency sign in the appropriate places)
- Make Appropriate Number of Photocopies (as required by the NOFA) and attach any letters of support or other documents to the paper application
- Deliver Application Hardcopy to GOCCP: An original and appropriate number of copies need to be delivered to GOCCP by the hardcopy deadline. The number of copies and deadline dates are outlined in the hardcopy NOFA.

7.3.1.12 View New Grant Application in Home Page

1. You can now view your newly submitted application.

2. Click **Home** to return to your home screen.

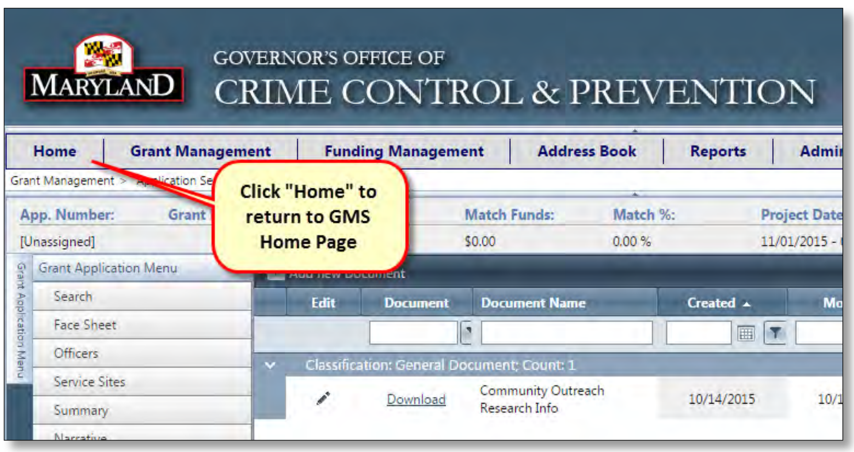


Figure 206 - Click Home to Return to your Home Screen

3. Your new application will appear in the Applications Dashboard, with the *Status of Awaiting Hardcopy*.

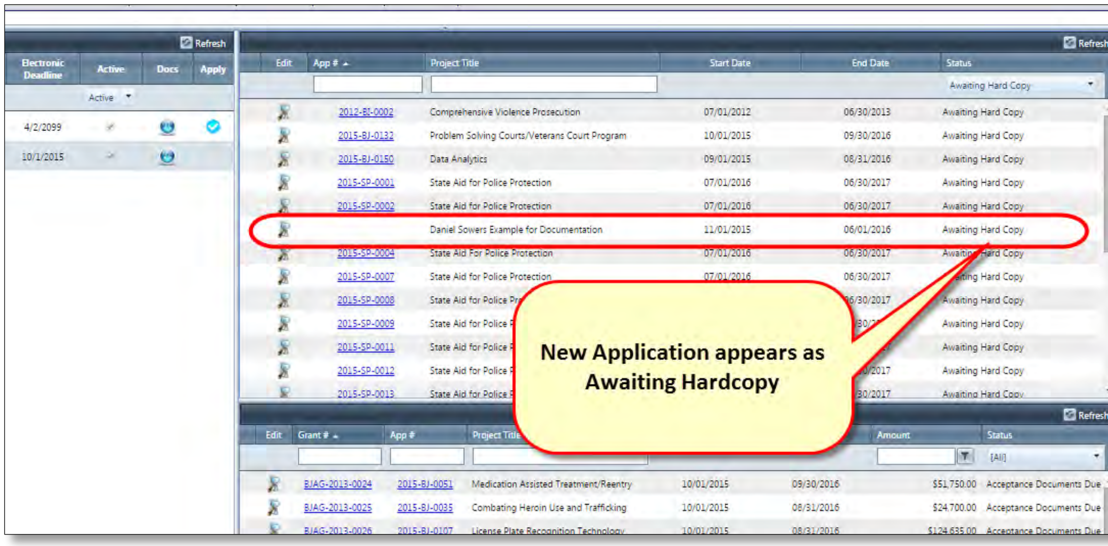


Figure 207 - New Application is displayed in Home Screen - Applications Dashboard

7.3.2 Withdraw a Grant Application (Internal Process)

GOCCP administrators with the appropriate permissions can withdraw an application any time before the grant is awarded.

1. Locate the application you want to withdraw in the Grant Applications Dashboard
2. Click the Edit icon to bring the application up in the Grant Application Menu
3. Click the Status drop-down box and select "Withdraw Application"
    - The grant application will automatically be withdrawn and the status will be changed to "Application Withdrawn".

Figure 208 - Withdraw Grant Application

7.3.3 Add a Budget Revision

7.3.3.1 About Budget Revisions

In GMS, the original (empty – unpopulated) budget for a grant application is called the **Original Grant Application Budget**. When you populate a budget for the first time, it is called **Budget Revision 0**.

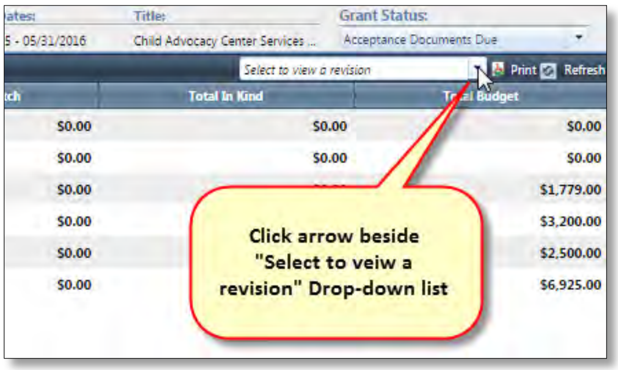
- Any time you revise, update, or add line items to your project budget after it was originally submitted, a **Budget Revision** is created and an auto-incremented numbers follows (for example, Budget Revision 0, Budget Revision 1 and so on).

- This provides you with an audit trail of all changes made to your project budget; each revision can be viewed individually at any time from the main project budget screen by using the Budget Revision Drop-down List.

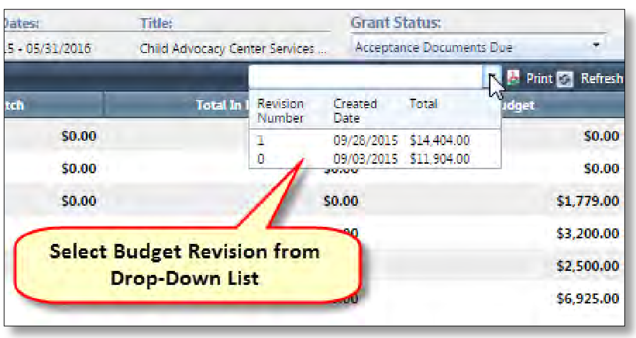
7.3.3.1.1 Budget Version Drop-down List

To view prior versions of a budget using the Budget Version Drop-Down List:

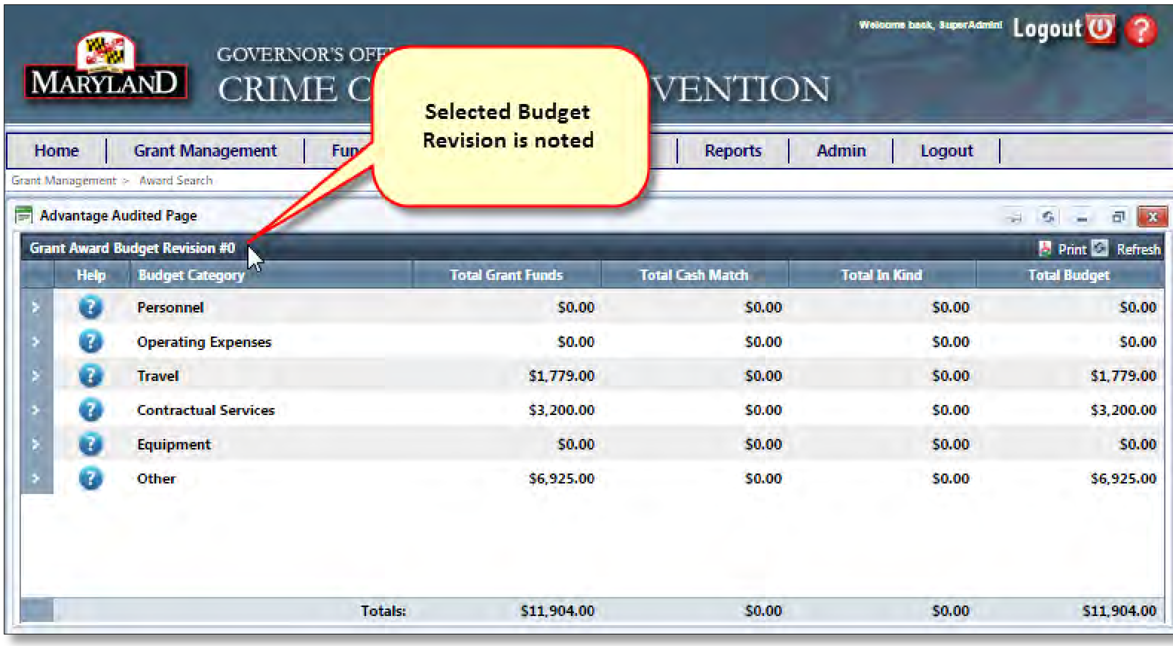
1. Locate the **Budget Version Drop-Down** List and click the arrow to bring up the list:



2. The drop-down list provides a list of all budget revisions – click on a revision to select it:



3. The version of the budget you selected is now displayed. Note that in this example, budget revision number 0 was selected. This is reflected in the upper-left corner of the screen:



7.3.3.2 Creating a Budget Revision

Following is a summary of steps involved in creating a budget revision for your project:

NOTE: Before proceeding, it may be helpful to generate a printed budget notice.

1. Begin by clicking on Add New Budget Revision. The Add New Budget Revision window is displayed:

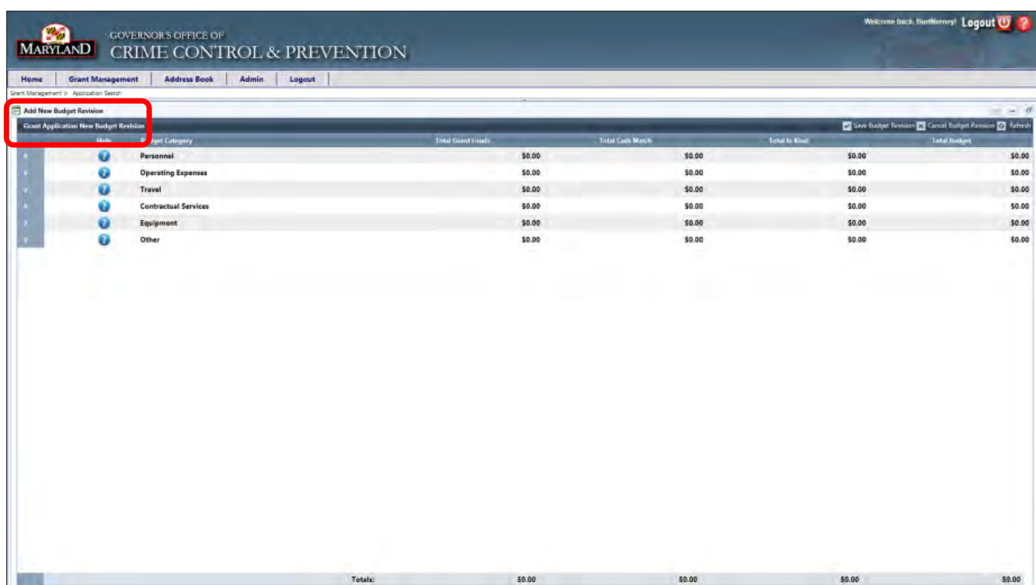


Figure 209 - Add New Budget Revision

- The Add New Budget Revision window is displayed, maximized and pinned within the process area. In the upper-right corner of the windows are icons that allow you to resize the window so that you can simultaneously view the most recent version while you're editing the new revision:

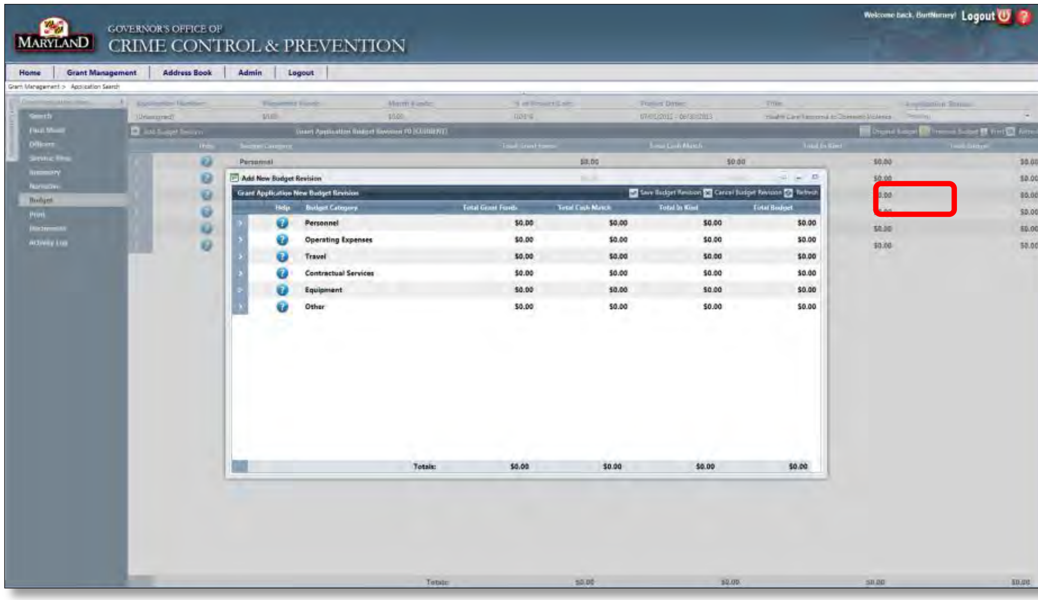


Figure 210 - Add New Budget Revision Window (Resized to view Current Budget Revision)

NOTE: Although you can view the most recent budget revision in the background, while the Add New Budget Revision window is active – maximized or not – you can only work within it; to get back to the main Budget Revision screen you must either save or cancel editing the new revision.

1. Click the **Expand** icon next to the Budget Category you want to add a new entry for. For this example procedure, click the **Expand** icon next to the **Personnel** Budget Category. Then click the **+** icon beside **Add New Record**.

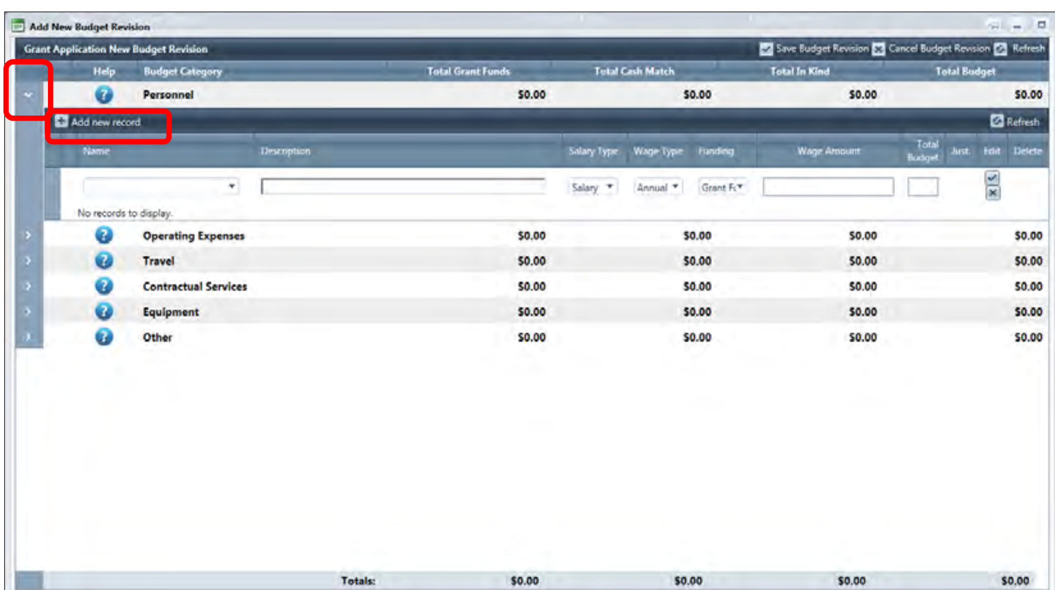


Figure 211 - Expand Budget Category and Add New Record

2. Add the required information to the new Personnel record as described below.

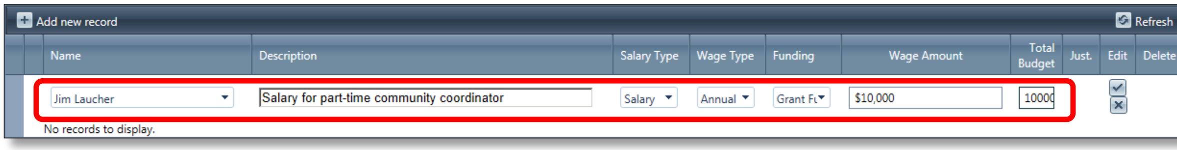


Figure 212 - Add Line Item Information

- **Name**: If available, type the name of the person in your organization you want to fund with this grant. If you have not yet hired the person or assigned someone to this position, leave this field blank.
- **Description**: Briefly describe the person's role (for example: New Admin Assistant)
- **Salary Type**: Indicate whether the line item is considered Salary, Fringe, or Overtime
- **Wage Type**: Indicate whether the line item is Salary or Hourly
- **Funding**: Select the means by which the position will be funded – Grant Funds, Cash Match, or In-Kind Match.

The following provisions apply to match requirements:

⇨ The sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or

⇨ IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food)

⇨ Funds from other Federal sources may not be used to meet the match requirement.

⇨ Funds or in-kind resources used as match must be directly related to the project goals and objectives.

⇨ Sub-recipients must maintain records which clearly show the source, the amount, and the timing of all matching contributions.

⇨ Sources of match are restricted to the same requirements as funds allocated under the federal program and must be documented in the same manner as federal program funds, including financial and programmatic reports.

- **Annual Salary: Enter the annual salary for the position. If it is an hourly position, you must annualize it to calculate the annual salary and enter it here.**
- **Requested Amount: Enter the amount of funds you are requesting for this resource.**

3. Click the **Checkmark** below **Edit** to add the new line item to the Personnel budget category. If you click the **X** button instead, the information you entered for this line item will be lost and you will be returned to the **Add New Budget Revision** window.

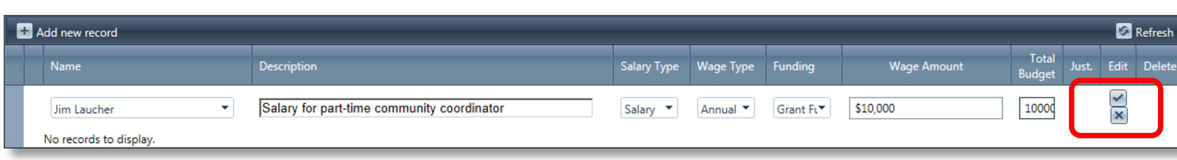


Figure 213 - Save new budget line item

4. After your new line item is saved, you are returned to the **Add New Budget Revision** window:

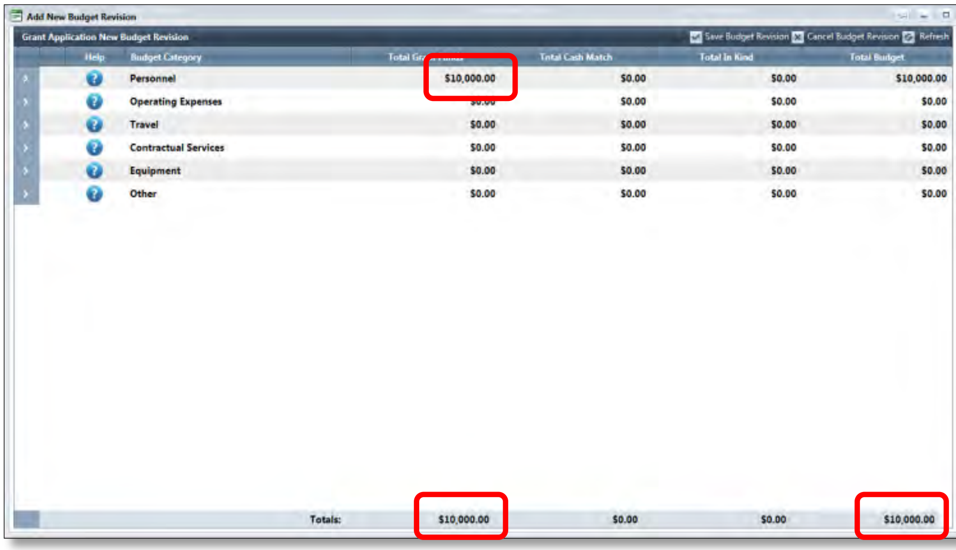
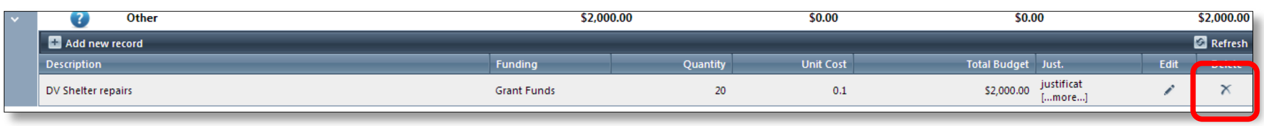


Figure 214 - Budget Totals Updated based on New Line Item

The following budget amounts are updated to reflect the newly added line item:

- Budget Category Total for each Match Type
- Total of all Categories for each Match Type
- Total Project Budget

5. Similarly you can delete a previously entered budget item by clicking the X in the Delete column.



6. Repeat the steps above for each budget entry you wish to make (expand category, add new record, enter line item information, and save the entry).

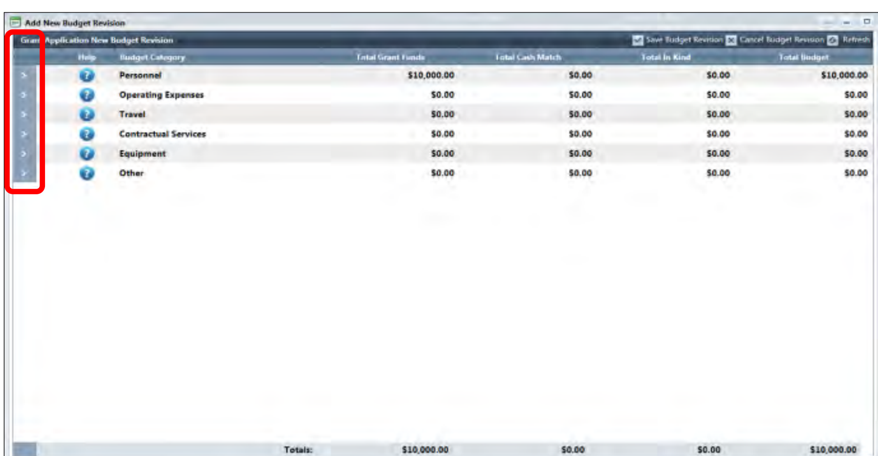


Figure 215 - Complete Remaining Budget Entries

7. When you've entered all of your budget line items, click the **Checkmark** beside **Save Budget Revision**.

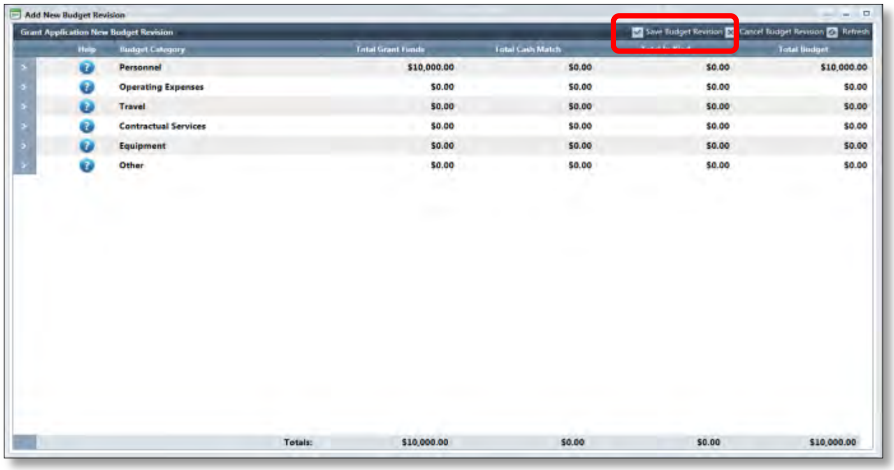


Figure 216 - Click Save Button to Save Budget Revision

8. You are returned to the main **Budget Revision** screen and see a new Budget Version Number:

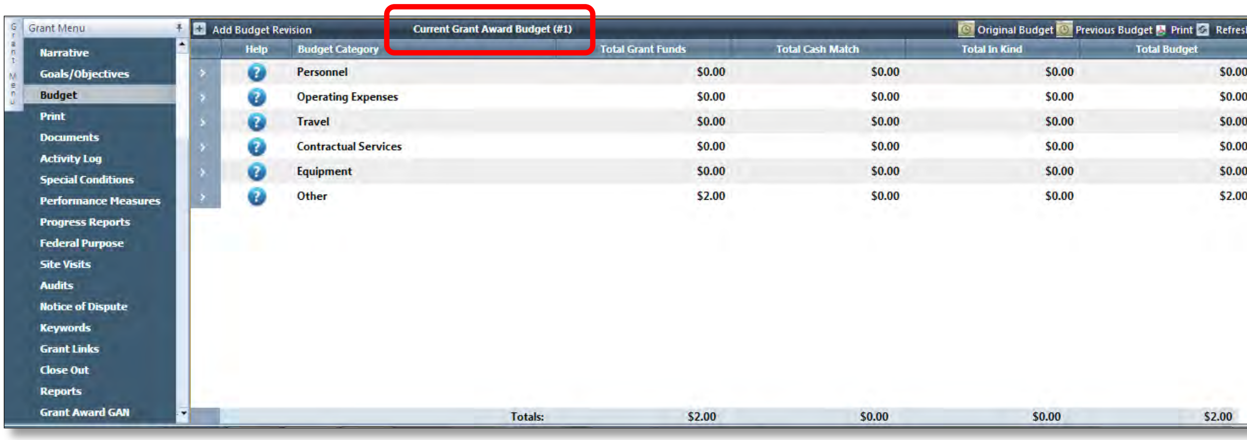


Figure 217 - Returned to main Budget Revision screen with a new budget version number

NOTE: While your new budget is saved, you must provide a justification for each entry in order to submit your application, as described in Section 6.2.1.9.

7.4 Viewing Grant Applications and Awards by Funding Year

The GMS Grant Management screen provides a central location to view all Funding Years and any grant applications and awards associated with them. To access this screen:

1. Select Grant Management from the main Grant Management menu in the navigation bar:

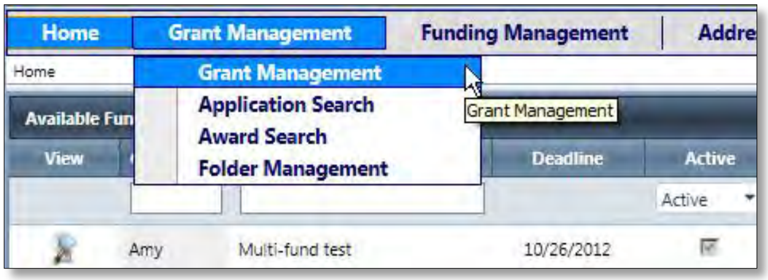


Figure 218 - Access the Grant Management Screen

2. The Grant Management screen is displayed:

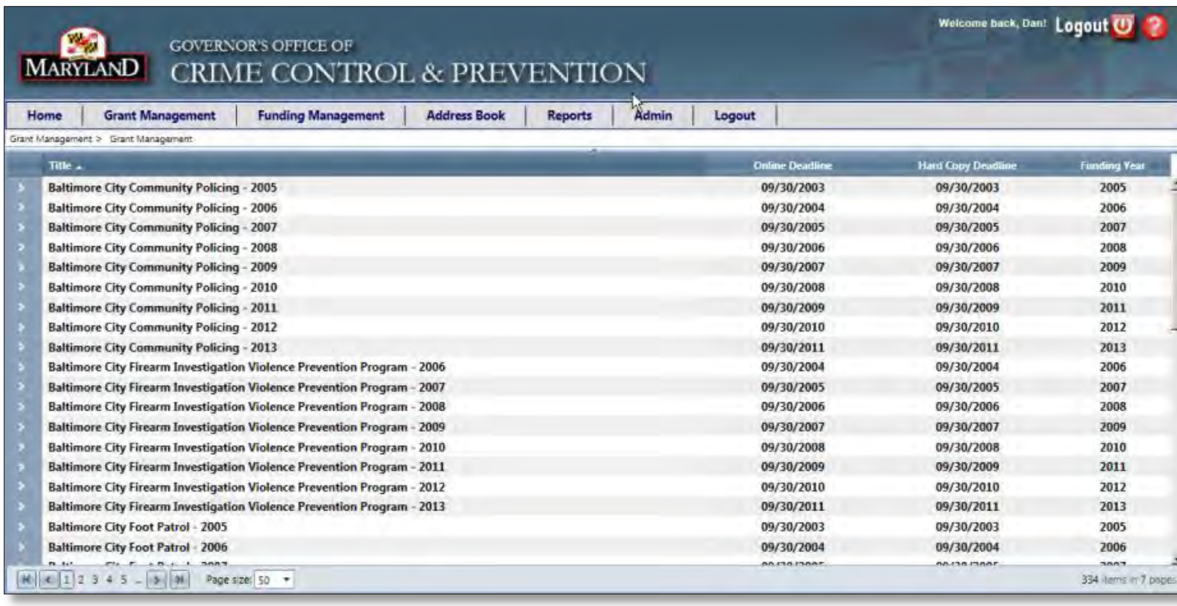


Figure 219 - GMS Grant Management Screen

3. Locate the Funding Year you wish to view, and click the Expand icon next to that Funding Year record. Any Grant Applications associated with the Funding Year are shown nested below the record and sorted by Application Number.

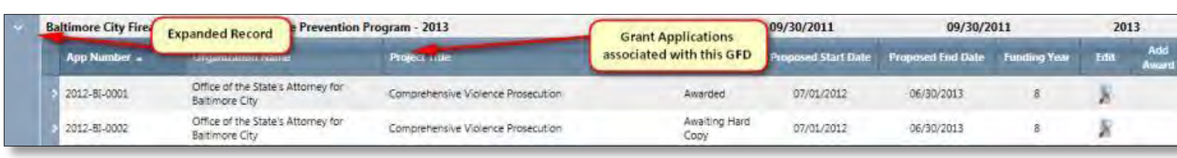


Figure 220 - Expanded GFD Record in Grant Management Screen

4. To view grant awards associated with an application, click the Expand icon next to the application record. Awards associated with that application appear nested below the application record.

Figure 221 - Grant Management -> GFD -> Application -> Award

5. To view details about, or edit the grant application associated with the Funding Year record, click on the magnifying glass icon in the Edit column of the Application list under the expanded record. NOTE: This causes you to exit the Grant Management screen. If you wish to edit a grant award listed below the application, skip to Step 7.

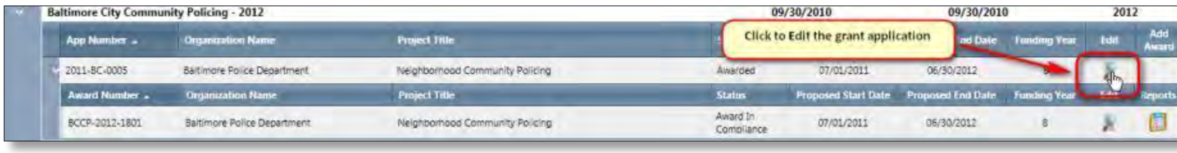


Figure 222 - Edit an Application associated with a GFD

6. Clicking the Application magnifying glass icon takes you to the Grant Application menu screen.

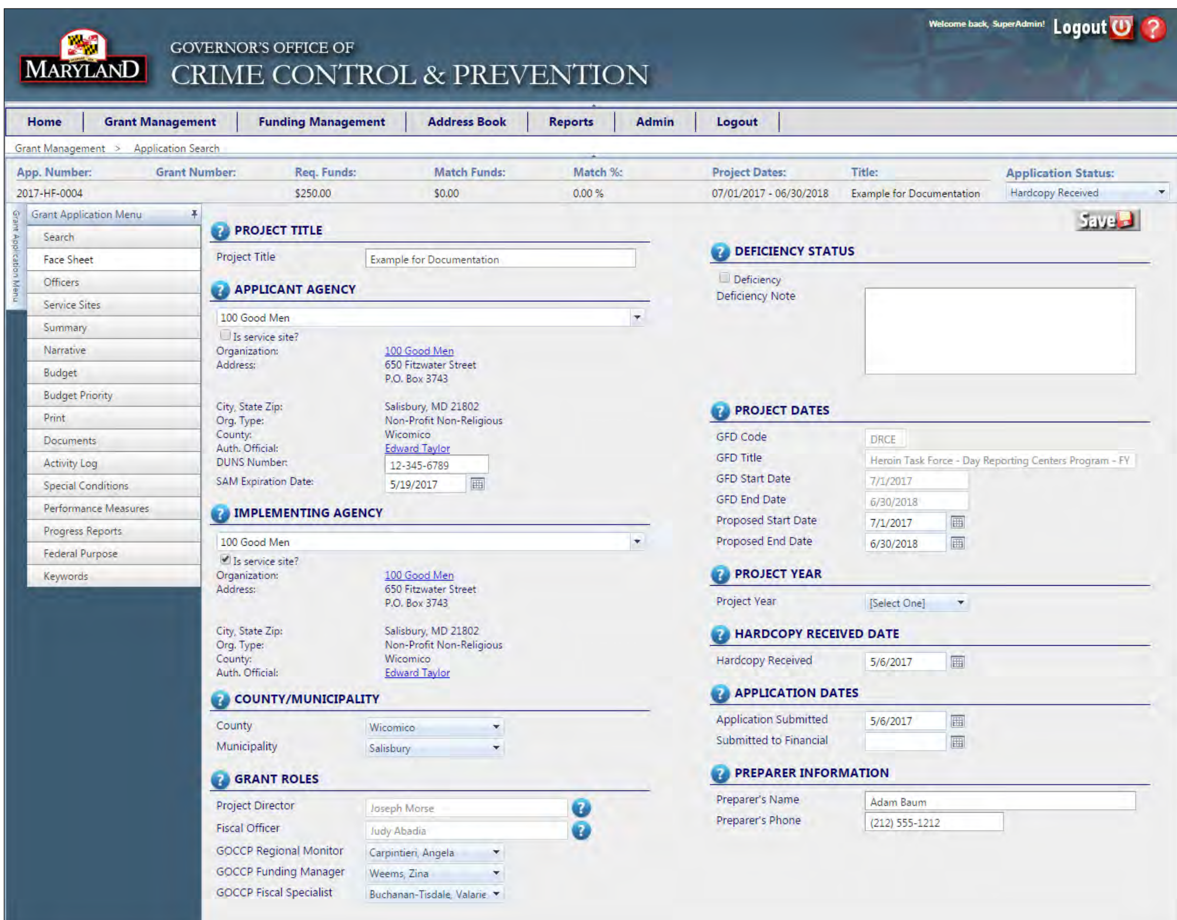


Figure 223 - Grant Application Menu Screen

7. To view details about, or edit the grant award associated with the application under the Funding Year record, click on the magnifying glass icon in the Edit column of the Award list under the expanded record.

Figure 224 - Edit a Grant Award associated with a GFD

8. Clicking on the Grant Award magnifying glass icon takes you to the Grant Award menu screen.

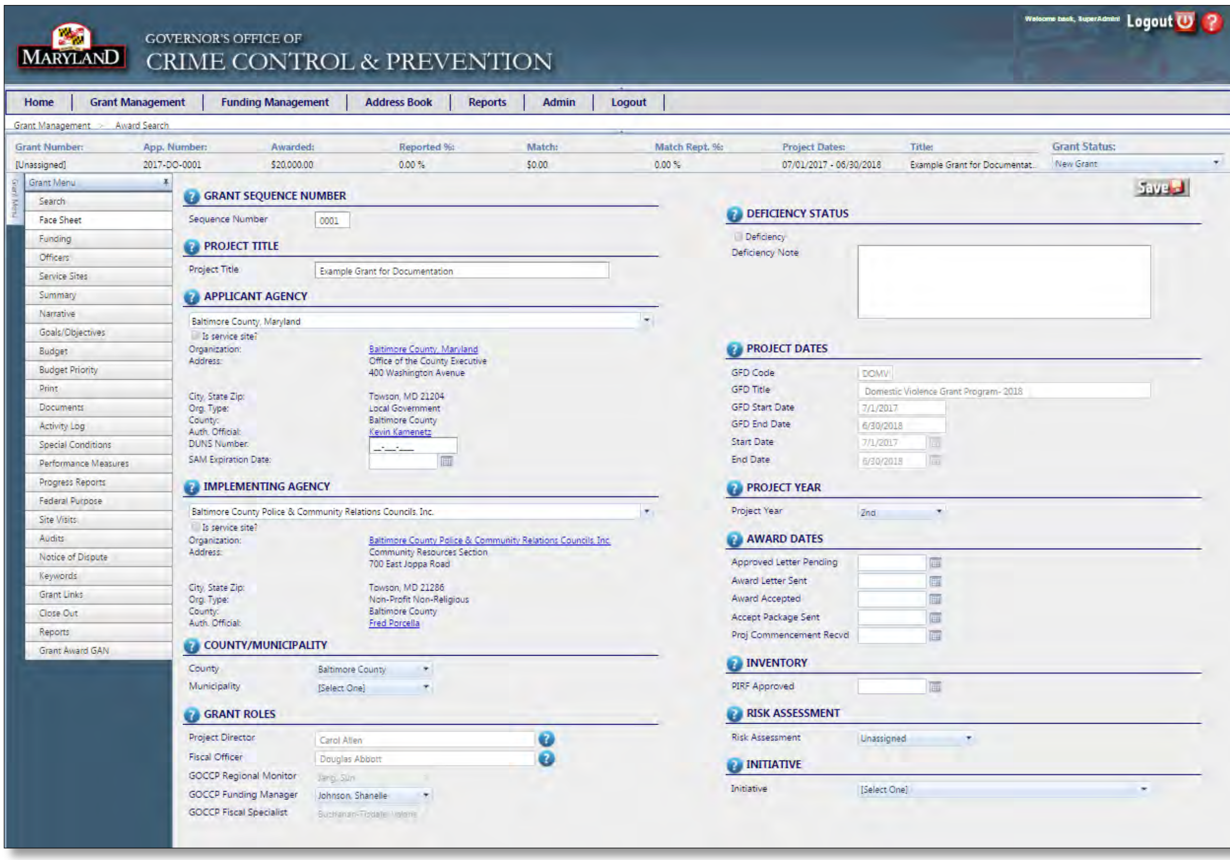


Figure 225 - Grant Award Menu – Face Sheet Screen

7.5 Review and Approval Process (Permissions Based)

7.5.1 Log Receipt of Grant Application Hardcopy

After a sub-recipient successfully submits a grant application, the status of that application within GMS is changed to Awaiting Hardcopy. Once the hardcopy arrives at GOCCP the status of the application to Hardcopy Received will initially be changed by the Control Desk staff. Future changes may include Program staff.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter.

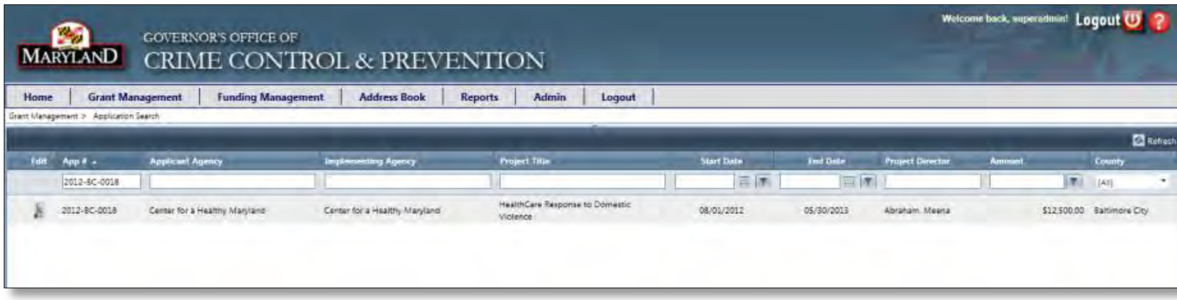


Figure 226 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.

3. Enter the date you received the hardcopy into the Hardcopy Received Date field, then click the SAVE button.

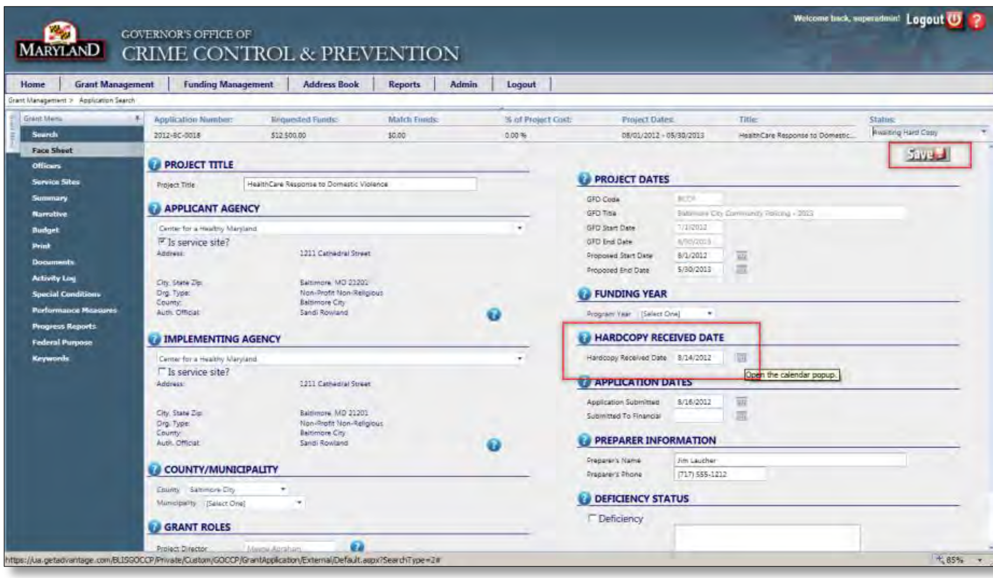


Figure 227 - Enter Hardcopy Received Date and Save

4. Click on the Status drop-down box and select "Receive Hardcopy".

Figure 228 - Change Status to Receive Hardcopy

5. Click the Save button when done.

The Status will now read ***Receive Hardcopy***.

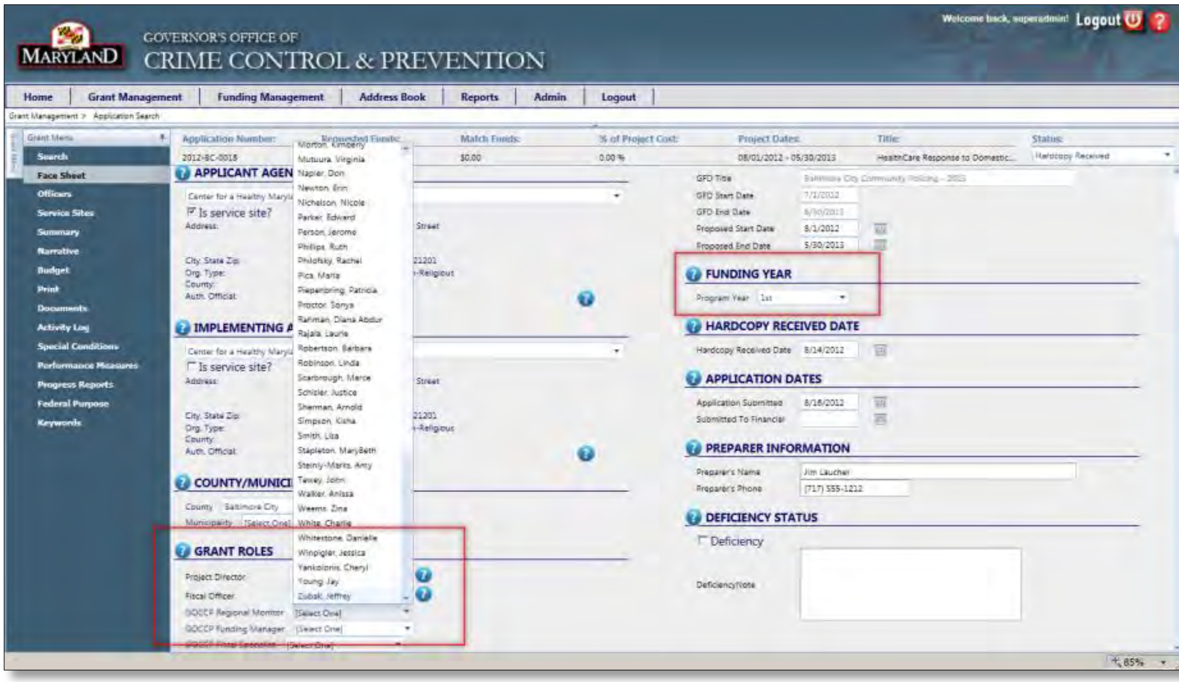


Figure 229 - Select Funding Year and Assign GOCCP Grant Roles

6. Program staff will change the status based on the completeness and correctness of the application. If everything looks good, they will change the status to ***Hardcopy Received***.

Figure 230 - Change Status of Application

The different statuses available in the drop-down menu are shown below:

- Return to Awaiting Hardcopy: Use if sub-recipient has errors in the hardcopy application and must correct & resubmit. This will change the application status to Pending in the user's Grant Applications Dashboard.
- Withdraw Application: Use to cancel the application at sub-recipient request. This will not delete the application – the system will retain it and mark it as withdrawn.
- Return to Applicant: Use to unlock the application record so the user can make revisions in any part of the application and resubmit when ready.
- Begin Internal Review: Use to start the Internal Review process.

7.5.2 Perform an Internal Review (Peer Review)

After a sub-recipient successfully submits a grant application and the GFD Point of Contact has formally received the hardcopy, you can proceed with the Internal/Peer Review phase of the application process.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting "Hardcopy Received" from the Status drop-down list, as this will be the status of any application ready for the Internal Review (Peer Review) process. The GFD Point of Contact moves related applications from Hardcopy Received to Internal Review to indicate the reviews have begun.

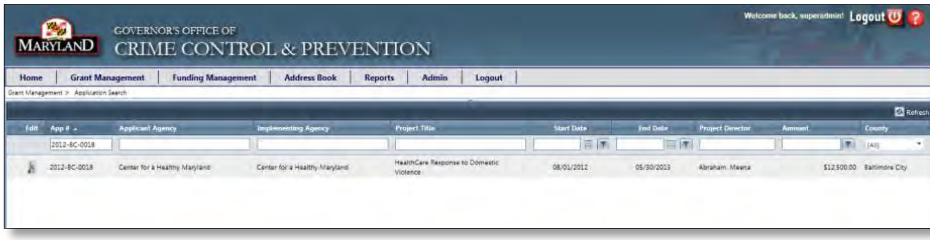


Figure 231 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.

3. To proceed to the Internal/Peer Review, change the Status of the application to "Begin Internal Review".

Figure 232 - Change Status to Begin Internal Review

The status of the application will change to "Internal Review" and will remain in this status until it is ready for the next process, which is the Pink Sheet Review. The Internal Review process includes: Budget Review, External Board/Peer Review, Executive Director Review, etc.

- Once in "Internal Review" status, the application will no longer appear in the sub-recipients Grant Applications Dashboard, as it cannot be edited while in review.

7.5.3 The Pink Sheet Review

When a grant application has passed successfully through the Internal Review process, it moves on to the Pink Sheet Review phase, which may be assigned to program staff other than the Funding Manager. It is normally during this phase that programmatic reporting requirements (Performance Measurements and Progress Report Questions) are assigned to the application. If the grant is awarded, the sub-recipient will be responsible for completing and submitting these requirements on a quarterly basis to keep their grant in compliance.

7.5.3.1 Pink Sheet Review Checklist

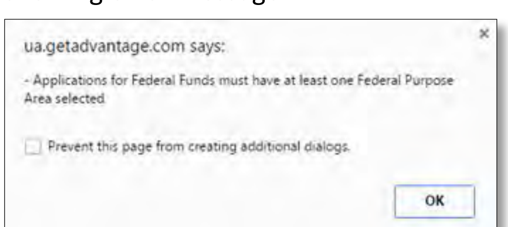
Use the following checklist to guide you through the Pink Sheet Review Process. Every required field of the application must be populated correctly, and several special conditions can occur that will prevent you from transitioning the application to the Grants Manager for review. All items in this checklist are described in detail in the following sections.

- ☐ Locate & Load Application
- ☐ Change Status to **Begin Pink Sheet Review**
- ☐ Confirm **Face Sheet** Fields are Complete
    - ☐ Project Title
    - ☐ Applicant Agency
    - ☐ Implementing Agency
    - ☐ County
    - ☐ Project Director
    - ☐ Fiscal Officer
    - ☐ Program Monitor
    - ☐ Program Manager
    - ☐ Fiscal Specialist
    - ☐ Grant Start Date
    - ☐ Grant End Date
    - ☐ Project Year (Funding Year)
    - ☐ Hardcopy Received Date
    - ☐ Application Submitted Date
    - ☐ Preparer's Name
    - ☐ Preparer's Phone
    - ☐ GOCCP Roles
- ☐ Add Special Conditions
- ☐ Add Performance Measures
- ☐ Add Progress Report Questions
- ☐ Add Federal Purpose Areas (if required)
- ☐ Add Keywords
- ☐ Submit Application to Grants Manager

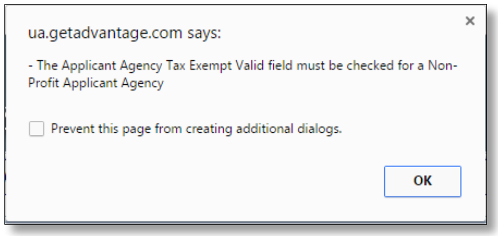
7.5.3.1.1 Special Conditions

Following is a brief checklist of special conditions that could prevent you from completing the Pink Sheet Review and submitting the application to the Grants Manager. Each is discussed in more detail in sections that follow.

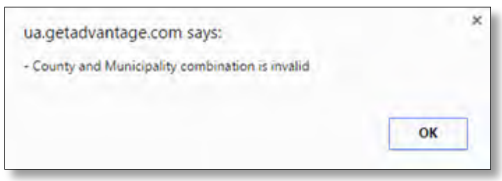
- ☐ **Federal Purpose Area Required**. If the funding program requires Federal Purpose Areas and you do not select any from the Available Federal Purpose Areas, then when you try to change the status from Pink Sheet Review to Submit to Grants Manager, you will receive the following error message:



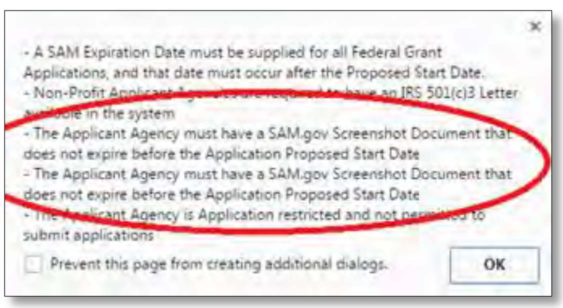
Applicant Agency's Tax Exempt Valid not Checked. If the **Tax Exempt Valid** checkbox is not, but should be checked, for a Non-Profit Applicant Agency, then when you try to change the status from Pink Sheet Review to Submit to Grants Manager, you will receive the following error message:



- [ ] **County/Municipality Mismatch**. On the Face Sheet, if you leave **County** set to [*Select One*], or if you select a **County** but not a **Municipality** (if there are Municipalities available for that County) then when you try to change the status from Pink Sheet Review to Submit to Grants Manager, you will receive the following error message:



- [ ] **No SAM.gov Document -or- Incorrect Date**: If the applicant is applying for a grant based on a Federal GFD, they must show proof of a SAM.gov screenshot document by uploading it to the documents section of the application. If they did not upload a document or the date is bad, then when you try to change the status from Pink Sheet Review to Submit to Grants Manager, you will receive the following error message:



7.5.3.2 Perform the Pink Sheet Review

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting "Internal Review" from the Status drop-down list, as this will be the status of any application ready for the Pink Sheet Review process.

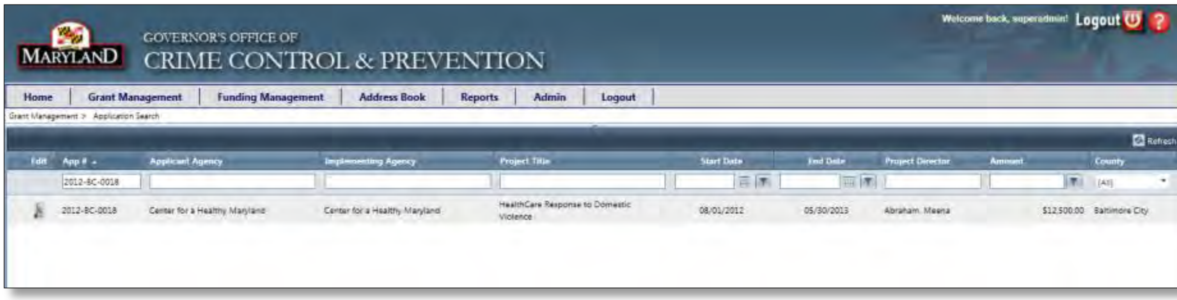


Figure 233 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.

3. To proceed to the Pink Sheet Review, change the Status of the application to "Begin Pink Sheet Review".

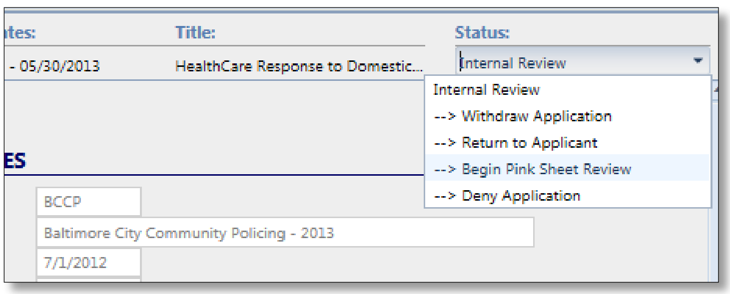


Figure 234 - Change Status to Begin Pink Sheet Review

The status of the application will change to "Pink Sheet Review" and will remain in this status until it is ready for the next process, which is Submit to Grants Manager for Review.

- While in "Pink Sheet Review" status, the application will no longer appear in the sub-recipients Grant Applications Dashboard, as it cannot be edited while in review.

After the Pink Sheet Review is initiated, you assign Programmatic Reporting requirements and Keywords to the grant application before moving on to the Grants Manager Review/Award phase.

7.5.3.3 Add Special Conditions to a Grant Application

1. Click Special Conditions in the Grant Menu to the left of the screen.

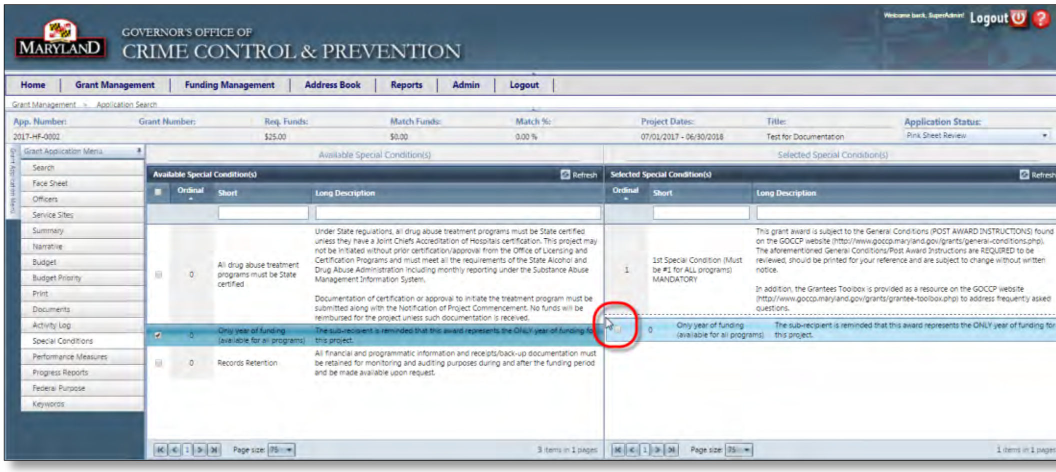


Figure 235 - Add Special Conditions to a Grant Application

- The **Available Special Conditions** pane provides a complete list of special conditions in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Special Conditions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.3) in order to appear here.
- The **Selected Special Conditions** pane is a list of special conditions that apply to this grant application.

2. Locate the Special Condition you wish to select for this grant application. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
3. Click on the Special Condition and hold the mouse button down.
4. Drag it over to the Selected Special Condition Pane.
5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
6. Repeat steps 1 through 4 for each Special Condition you wish to select for this grant application.

7.5.3.4 Add Performance Measures to a Grant Application

1. Click Performance Measures in the Grant Menu to the left of the screen.

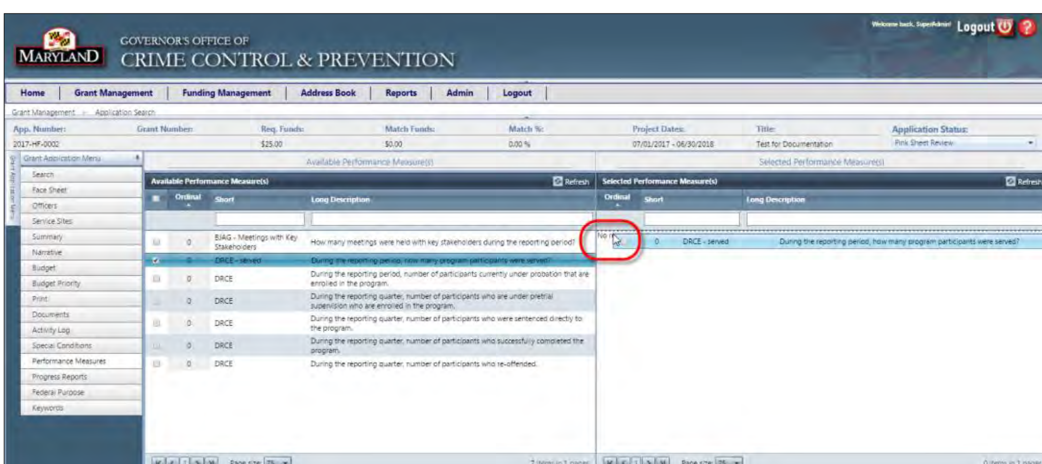


Figure 236 - Add Performance Measures to a Grant Application

- The **Available Performance Measures** pane provides a complete list of performance measures in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Performance Measures not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.4) in order to appear here.
- The **Selected Performance Measures** pane is a list of performance measures that apply to this grant application.

2. Locate the Performance Measure record you wish to select for this grant application. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
3. Click on the record and hold the mouse button down.
4. Drag it over to the Selected Performance Measure Pane.
5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
6. Repeat steps 1 through 4 for each Performance Measure you wish to select for this grant application.

7.5.3.5 Add Progress Report Questions to a Grant Application

1. Click Progress Report Questions in the Grant Menu to the left of the screen.

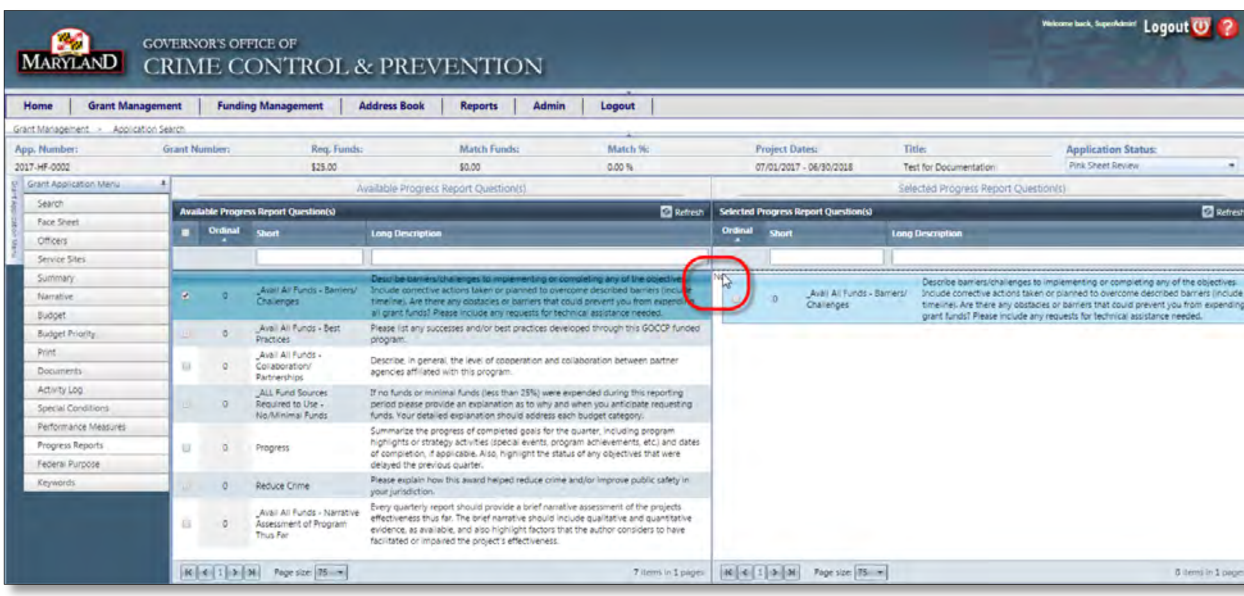


Figure 237 – Drag Progress Report from Available Pane to Selected Pane

- The **Available Progress Report Questions** pane provides a complete list of progress report questions in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Progress Report Questions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.5) in order to appear here.
- The **Selected Progress Report Questions** pane is a list of progress report questions that apply to this grant application.

2. Locate the Progress Report Questions record you wish to select for this grant application. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.
3. Click on the record and hold the mouse button down.
4. Drag it over to the Selected Progress Report Questions Pane.
5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
6. Repeat steps 1 through 4 for each Progress Report Question you wish to select for this grant application.

7.5.3.6 Add Federal Purpose Areas to a Grant Application

1. Click Federal Purpose in the Grant Menu to the left of the screen.

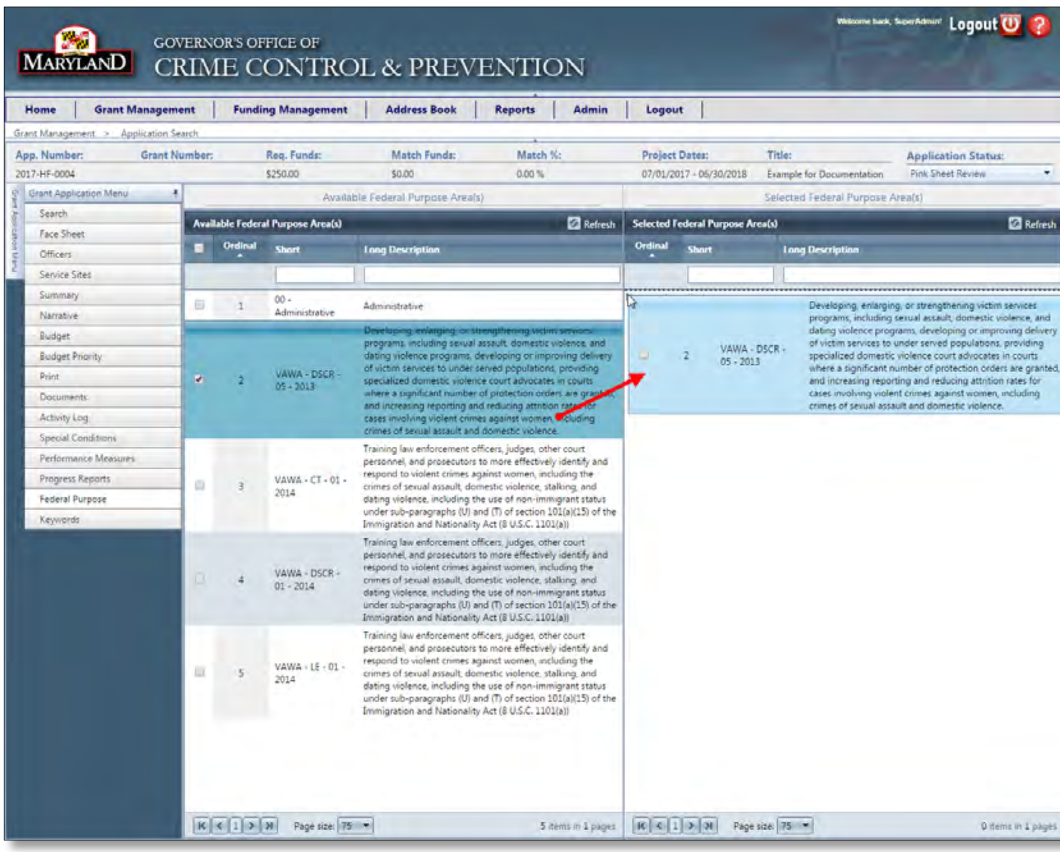


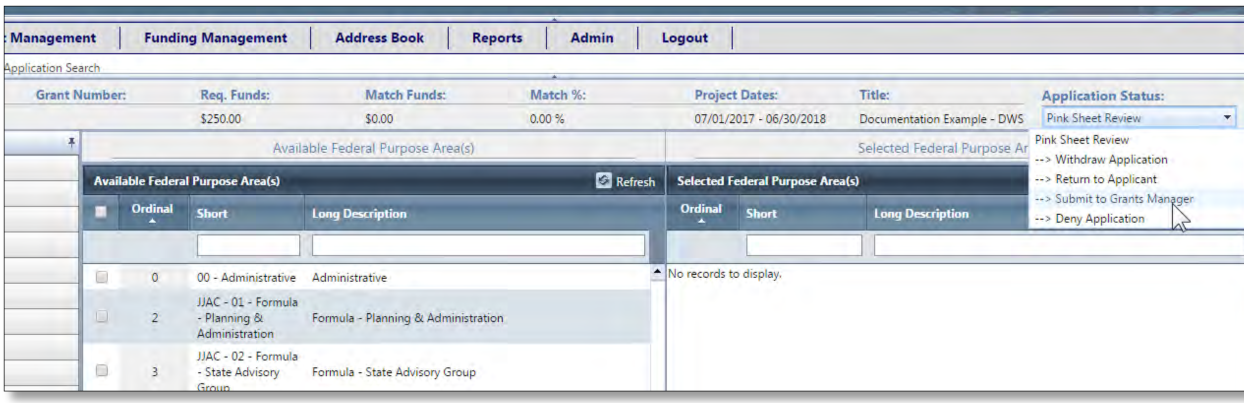
Figure 238 – Drag Federal Purpose Area from Available Pane to Selected Pane

- The **Available Federal Purpose Areas** pane provides a complete list of federal purpose areas in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Federal Purpose Areas not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.6) in order to appear here.
- The **Selected Federal Purpose Areas** pane is a list of federal purpose areas that apply to this grant application.

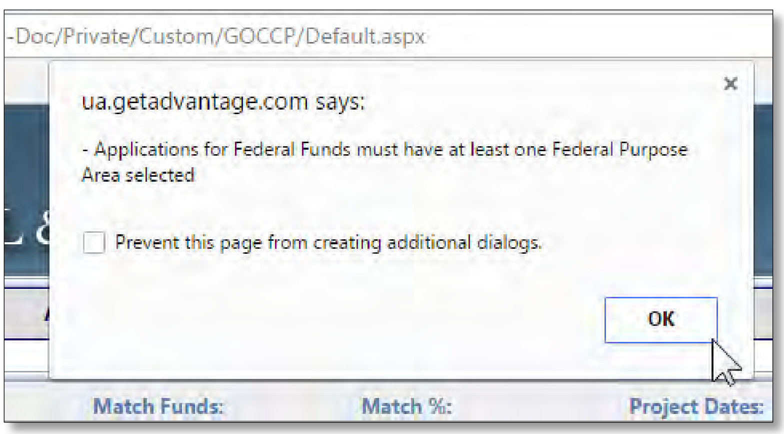
2. Locate the Federal Purpose Area record you wish to select for this grant application. Refer to the section ***Sorting, Filtering, and Searching for Records*** for tips on filtering and searching the list.

3. Click on the record and hold the mouse button down.
4. Drag it over to the Selected Federal Purpose Areas Pane.
5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
6. Repeat steps 1 through 4 for each Federal Purpose Area you wish to select for this grant.

NOTE: If the funding program requires Federal Purpose Areas (refer to section 6.2) and you do not select any from the Available Federal Purpose Areas, then when you try to change the status from Pink Sheet Review to Submit to Grants Manager:



you will receive the following error message:



If this happens, follow steps 2-5 above to select Federal Purpose Areas from the Available side.

7.5.3.7 Add Keywords to a Grant Application

You must select at least one Keyword in order to process a Grant Application.

1. Click Keywords in the Grant Menu to the left of the screen.

Figure 239 - Add Keywords to a Grant Application

2. Click on Add New Record

3. Click the Keywords drop-down list and select one or more keywords by clicking to place a checkmark in the box beside the keyword(s) – select all that apply.

4. When you've selected the Keywords, **click on the checkmark icon to SAVE your keywords**.

After you've successfully added programmatic reporting requirements and keywords to the grant application, you can proceed to the next phase, which is the Grants Manager Review.

7.5.3.8 Return to the Face Sheet and Assign Funding Year and GOCCP Grant Roles

Based on permissions, complete the Face Sheet by selecting the Funding Year from the **Project Year** drop-down list and assigning the following GOCCP Grant Roles:

- Funding Manager
- Fiscal Specialist

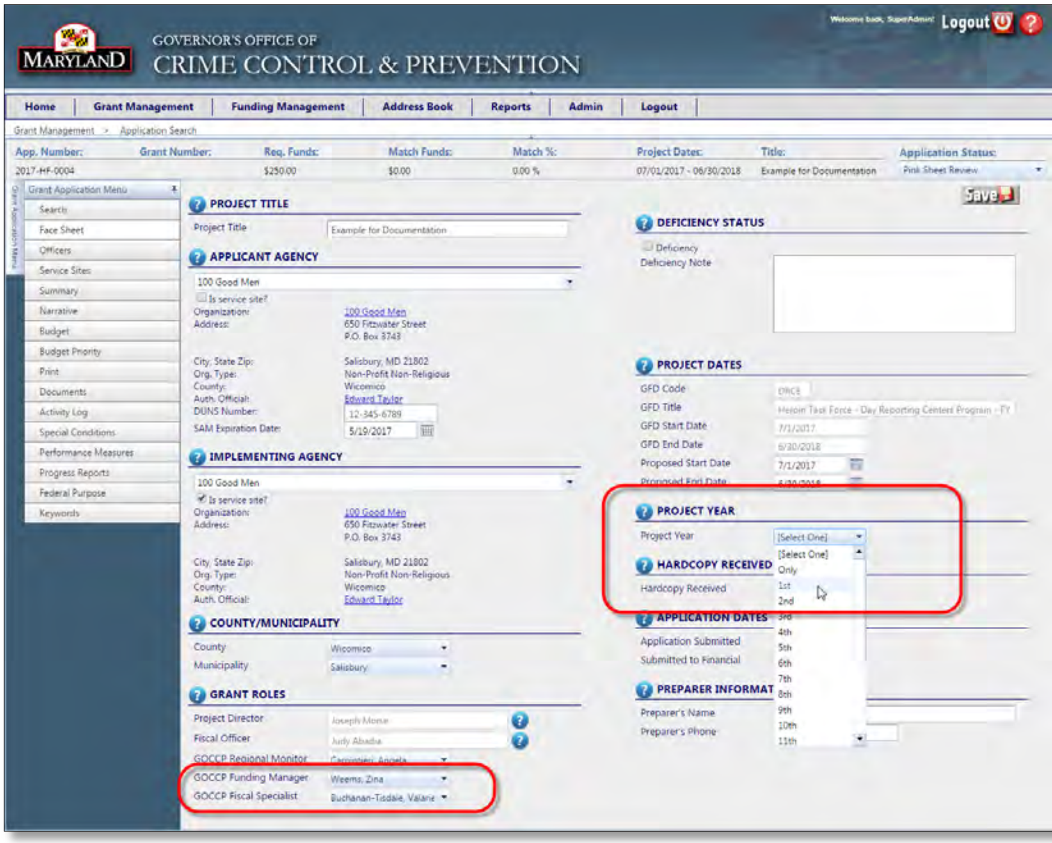


Figure 240 – Assign GOCCP Grant Roles and Select Funding Year

7.5.4 Submit a Grant Application to the Grants Manager

An application submitted to the Grants Manager has been completely reviewed and approved for funding.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting "Pink Sheet Review" from the Status drop-down list, as this will be the status of any application ready for the Grants Manager Review/Award process.

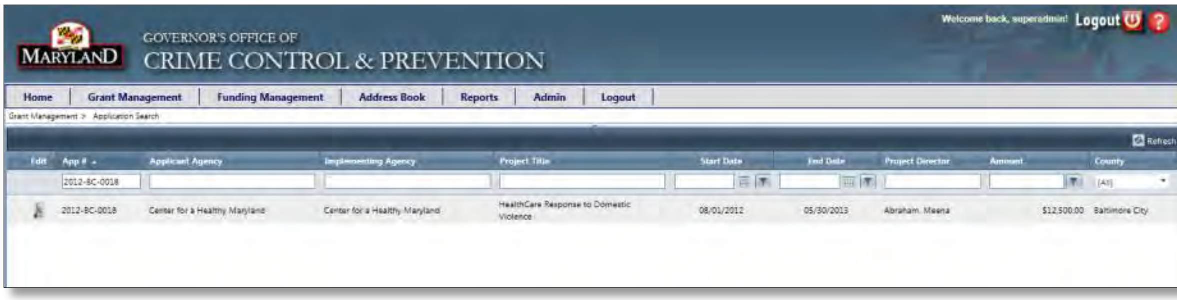


Figure 241 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.
3. Click the Status drop-down list and select "Submit to Grants Manager".
4. (Internal Business Process) Physically deliver the packet to the Grants Manager. The packet must contain the following (in the order listed below):
    a. Application Processing & Certification Form
    b. Application Processing Checklist (Pink Sheet)
    c. Application (Face Sheet on top)
    d. All Peer/Internal Review Documents

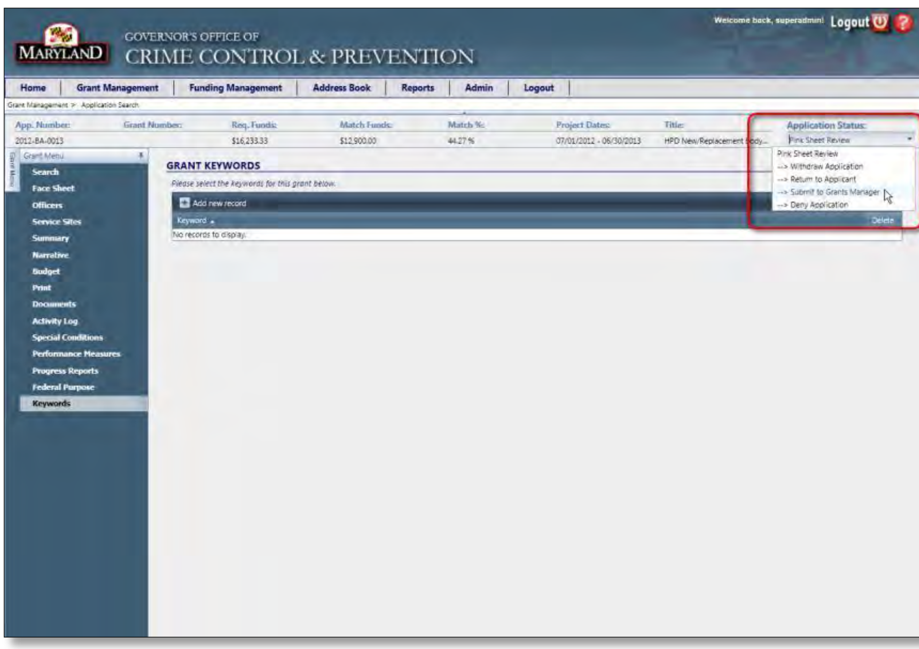


Figure 242 - Submit Grant Application to Grants Manager for Review

- The Status will change to Pending Award

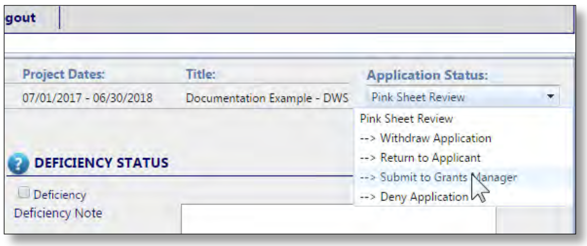
5. The Grants Manager can now Award the application, after a final review of the Face Sheet and all other data associated with the Grant Application.

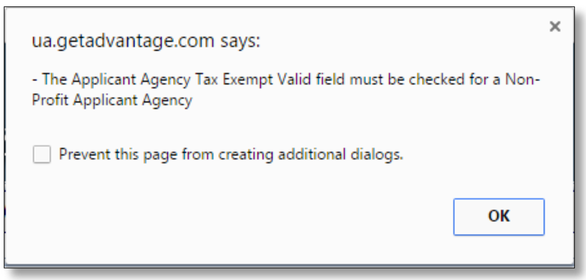
7.5.4.1 Possible Reasons you Cannot Successfully Submit to the Grants Manager

The final step in the Pink Sheet Review process is to submit the grant application to the Grants Manager. There are several reasons this process could fail:

7.5.4.1.1 Unable to Submit to Grants Manager (Tax Exempt Valid not Checked)

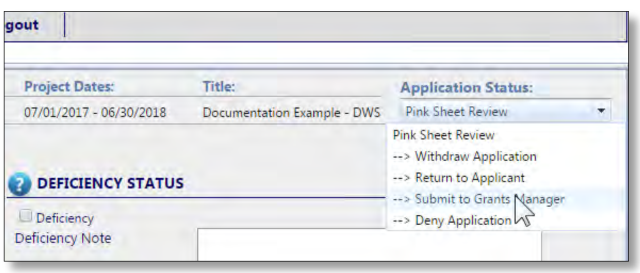
Under certain conditions you will not be able to transition the grant application to the Grants Manager. One cause of this is that the "Tax Exempt Valid" checkbox is not (but should be) checked for a Non-Profit Applicant Agency. You will receive the following error:



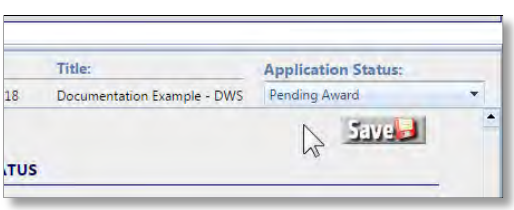


Refer to Section 8.2.4 Validate an Organization as Tax Exempt for instructions on making an organization tax-exempt in GMS.

After you change the organization's tax exempt status as shown in Section 8.2, come back to the application and try again to change its status to Submit to Grants Manager.

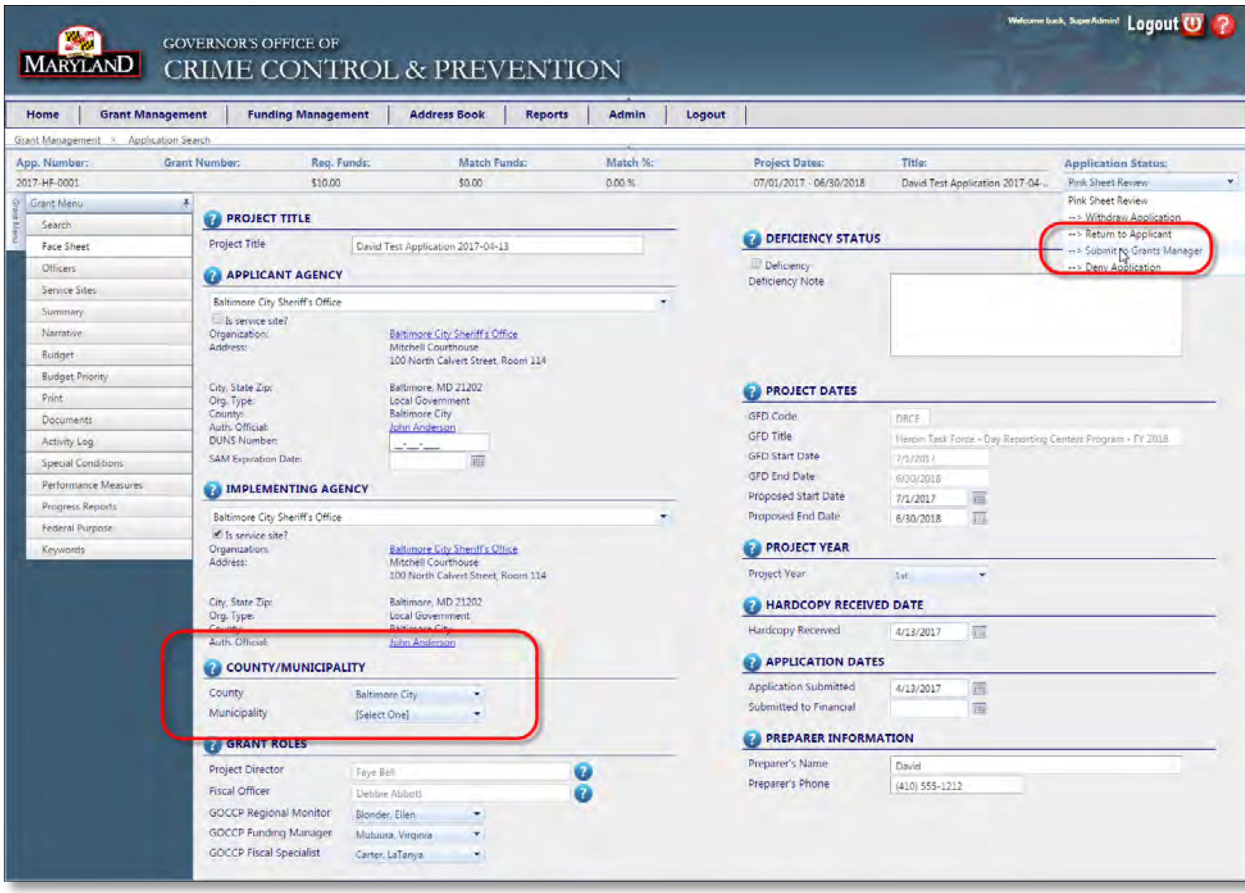


The status should change to Pending Award after correcting the tax exempt status of the organization:

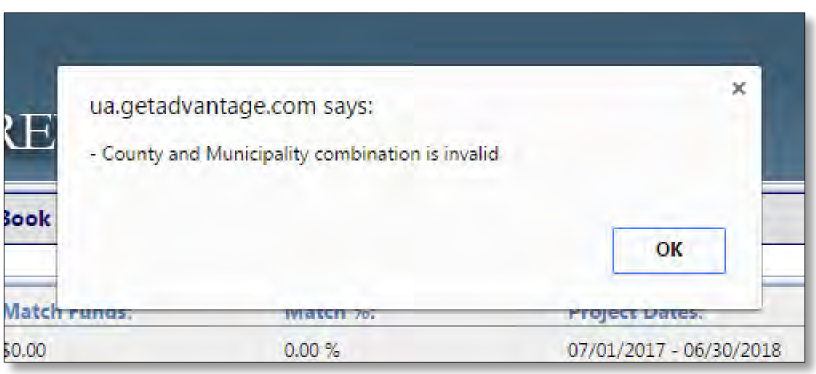


7.5.4.1.2 Unable to Submit to Grants Manager (County/Municipality Mismatch)

If for some reason the County and Municipality selected on the Face Sheet do not match or a Municipality is not selected within the County, you will receive an error message and the grant application will not be transitioned to the Grants Manager:



The Municipality has not been selected, so the following error message is displayed:



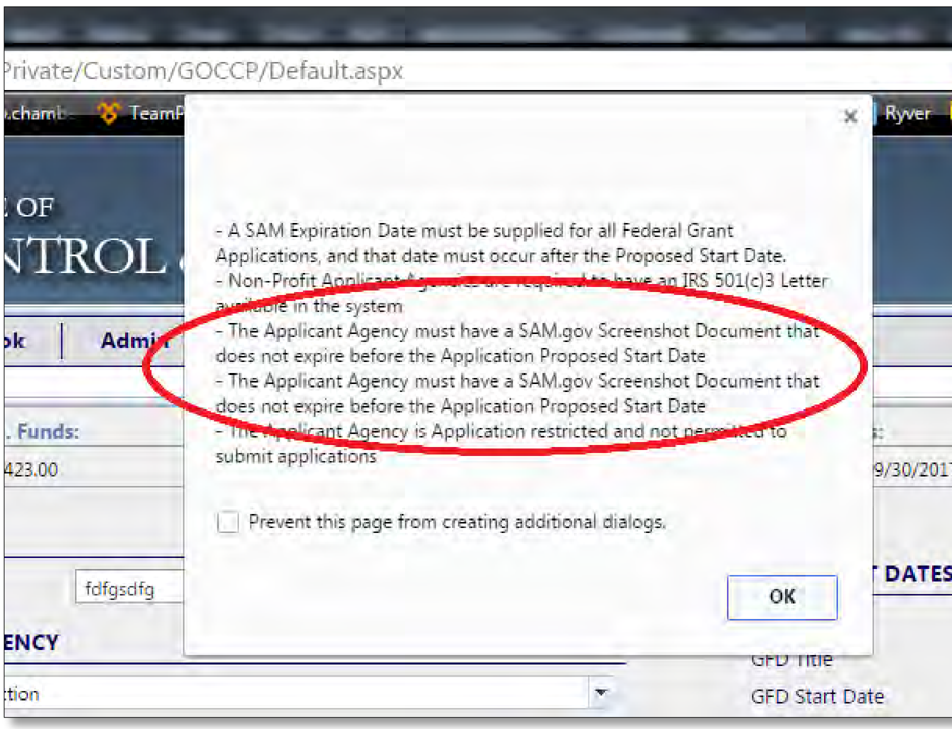
To remedy the situation, you must select a valid Municipality from the drop-down list, then try again to submit the grant to the Grants Manager.

7.5.4.1.3 Unable to Submit to Grants Manager (No SAM.gov document or incorrect date)

If the applicant is applying for a grant based on a Federal GFD, they must :

- Show proof of a SAM.gov screenshot document by uploading it to the documents section of your application.
- Ensure that the document is dated correctly with regard to the application proposed start date (screenshot document expiration date is equal to or after the application start date.

This is covered in the **Apply for a Grant** section, but if the applicant does not upload a valid SAM.gov screenshot document, or they do but the document's expiration date is prior to the application proposed start date, you will receive an error message similar to the following one:



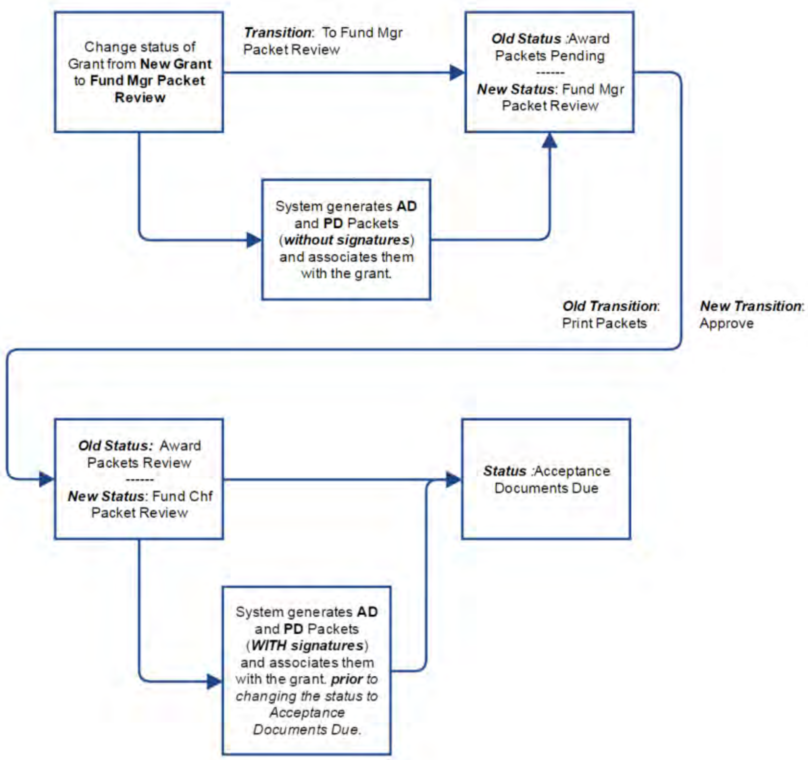
7.6 Managing Grant Applications (Grants Manager Awarding Process (Permissions Based)

This section guides the internal GOCCP user through the process of turning a grant application into a grant award, including logging the initial receipt of a grant application, updating its status through the various reviews, and awarding the grant.

7.6.1 A Note Regarding Improvements to the Grant Awarding Process (Permissions Based)

Status names have changed, as has the workflow involved in approving a grant. For example:

- The Funding Manager will receive a copy of every award packet email (AO Award Packet and PD Award Packet) that is sent to their grantees.
- New Grant now transitions to Fund Mgr Packet Review instead of Award Packets Pending.
    - In addition, this transition generates AD and PD packets (***without signatures***) and associates them with the grant.
    - **NOTE:** When you attempt to move a grant between **New Grant** and **Fund Mgr Packet Review**, the system validates that the Grant Start and End dates are within the Funding Source Start and End dates (inclusive). If the Application Start and End date range is outside the Funding Source Start and End Dates, you will receive an error message and will not be able to continue with the transition.
- If a grant is in Fund Mgr Packet Review, Approve (instead of Print Packets) is used to transition the grant to the Fund Chf Packet Review.
- Finally, the old status of Award Packets Review is now Fund Chf Packet Review. The transition from FundChf Packet Review is made to Acceptance Documents Due. Note that immediately when this transition is initiated, the system generates AD and PD packets ***with*** signatures and associates them with the grant.



7.6.1.1 Grants Manager Review Process – Workflow Changes (Based on Permissions)

To make it easier to become accustomed to the new statuses, the following list provides a summary of the old statuses along with the new ones shown in the flowchart above. The names of many statuses ***have changed***, and will be used throughout the following sections.

1. **Grant Award Workflow - Fund Mgr Packet Review Status**
   Where you would have seen the ***Award Packets Pending*** Status
   you will now see ***Fund Mgr Packet Review***

2. **Grant Award Workflow - Fund Chf Packet Review Status**
   Where you would have seen the ***Award Packets Review*** status
   you will now see ***Fund Chf Packet Review Status***

3. **Fund Mgr to Fund Chf Transition Process Name**
   When you view the available status processes in the Status combo for a Grant
   and the ***Grant is in the Fund Mgr Packet Review*** status
   the transition to ***Fund Chr Packet Review*** will now be named ***Approve*** (previously Print Packets)

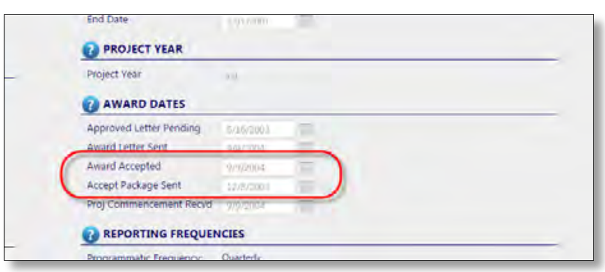
4. **Generate Award Packet on Funding Assigned**
   When you change the status of a Grant from ***New Grant*** to ***Fund Mgr Packet Review***
   the system will generate the AO ad PD Packets (without signatures) and associate them with the Grant.

5. **Overwrite (regerenate) Award Packet on Mail Award Packets**
   When you change the status of a grant from ***Fund Chf Packet Review*** to ***Acceptance Documents Due*** then the system will generate the AO and PD Packets (with signatures) and associate them with the Grant.

6. **Overwrite (regenerate) Award Packet on Mail Award Packets – Action Execution Order**
   When you change the status of a Grant from ***Fund Chf Packet Review*** to ***Acceptance Documents Due***
   then the system will generate the AO and PD Packets and associate them with the Grant as the first action for the transition.

7.6.1.2 Award Dates are Auto-Populated when Packets are Sent

Whenever the packets are sent, two fields in the Face Sheet are populated automatically to reflect when the packets are sent – the **Accept Package Sent** and the **Award Accepted** fields.



7.6.2 Award a Grant Application (Based on Permissions)

When a grant application has passed successfully through the Grants Manager Review process, the final step is to award the grant in GMS.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting "Pending Award" from the Status drop-down list, as this will be the status of any application ready for the Awarding process.

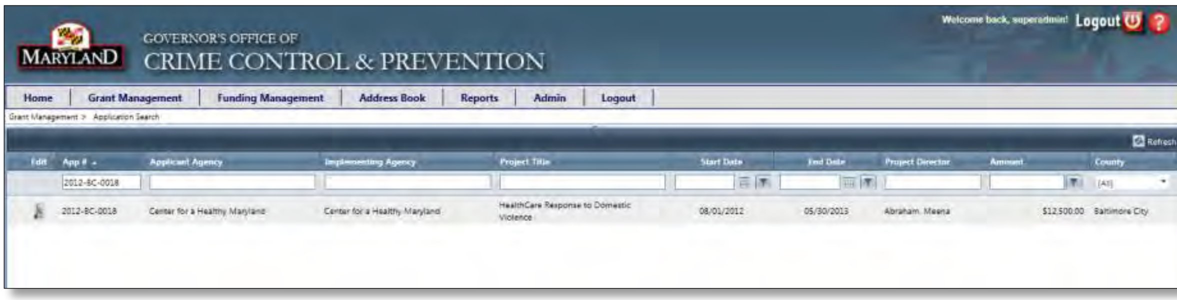


Figure 243 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.
3. Click the Status drop-down list and select "Award Application".

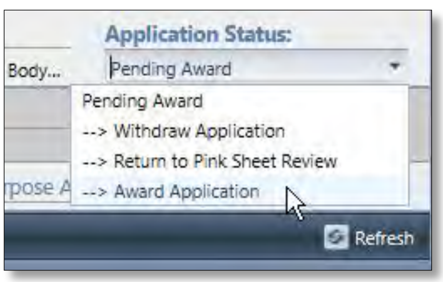


Figure 244 - Click Award Application

4. The sub-recipient will see not see the new grant award in their Grant Awards dashboard until the Grant Award Packets have been printed and the Grant Award is in Acceptance Documents Due status.

When a grant application has first been awarded in GMS, a Grant Award is created which is linked within the system to the application.

After awarding an application, the system will return you to the Application Search Grid. You may continue to award applications using the steps outlined above, or you may proceed with the next steps in the grant award processing phase.

To continue with the grant award processing phase, navigate to the award for the grant via Grant Management > Award Search (refer to section ***Searching for a Grant Award*** for further instructions).

Figure 245 – Select Award Search

Search using the application number or project title. Once located, click on the edit icon in the search grid to view the details of the award.

Please refer to the section ***Sorting, Filtering, and Searching for Records*** for help with finding a grant award.

7.6.3 How to Define Reporting Frequency at the Grant Award Level

Defining Reporting Frequency at the Grant Award Level takes place in the Grant Award Face Sheet.

1. Locate the award you wish to review reports for via Grant Management -> Award Search.

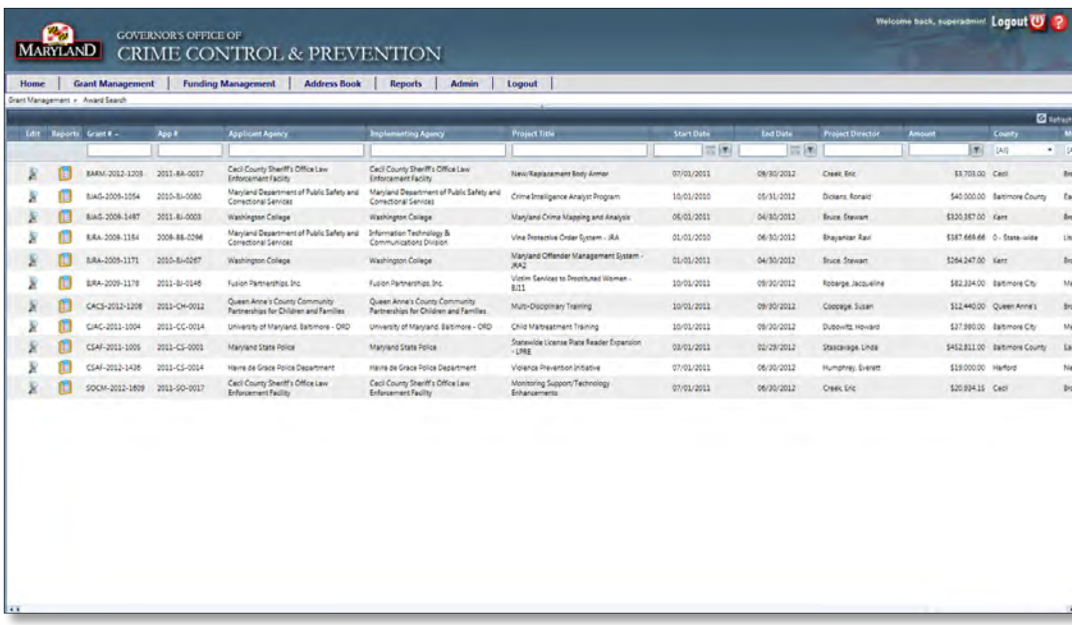


Figure 246 – Locate Grant Award in Award Search Screen

2. Click on the magnifying glass icon in the Edit column of the Award record.

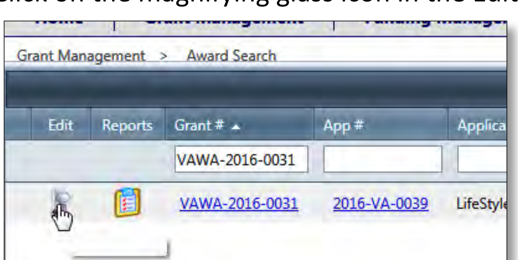


Figure 247 – Click Magnifying Glass Icon in Edit Column

3. This brings up the Award detail screen with the detailed Grant Award Menu and defaults to the Face Sheet.

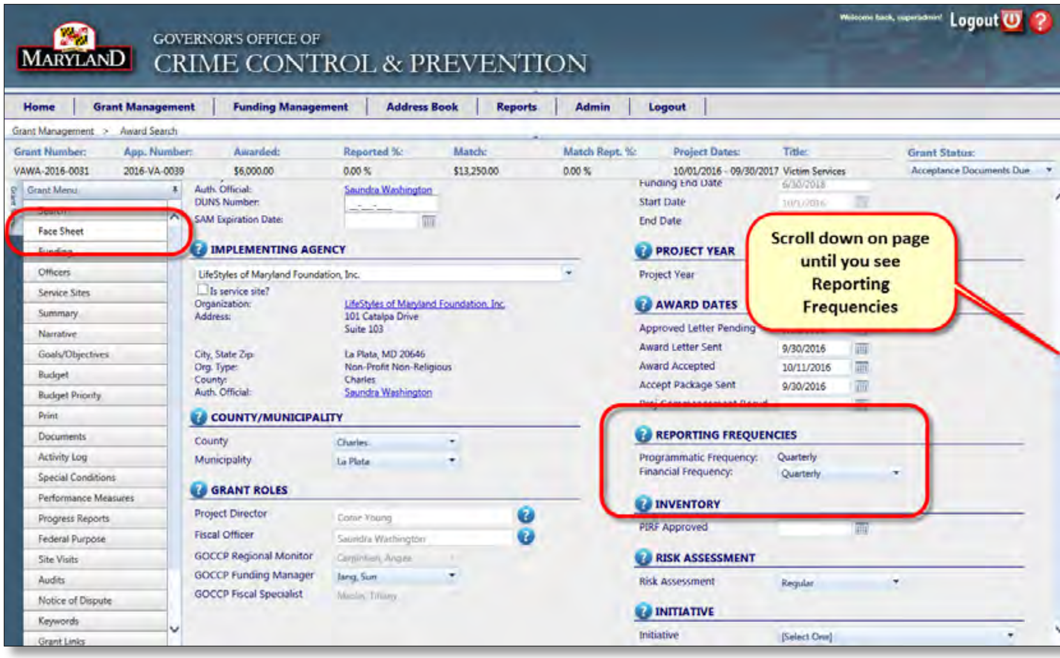


Figure 248 – Award Detail Face Sheet is Displayed with Grant Menu

4. In the **Reporting Frequencies** section, there are two report types:
   a. Programmatic Frequency, which, in this case, is locked into a value of **Quarterly**, and
   b. Financial Frequency, which can be monthly or quarterly

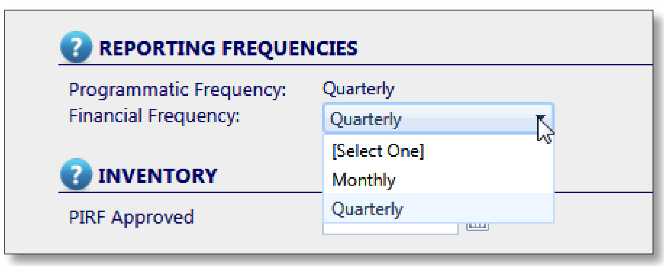


Figure 249 – New Document Record Displayed in List

5. GOCCP can require a subrecipient to submit monthly financial reports by selecting **Monthly** from the pull-down menu.

NOTE: The Programmatic Reporting Frequency and the Financial Reporting Frequency shown on the Face Sheet are inherited from the Funding Program upon which the Grant Award is based. The Programmatic Frequency cannot be changed, but as shown in Step 5, the Financial Frequency can be changed.

6. **NOTE**: Once you've selected **Monthly** as the Financial Reporting Frequency, a **Must Report** check box appears directly below the **Financial Frequency** pull-down menu. By clicking the check box to place a checkmark in it, you will be requiring the subrecipient of this award to submit financial reports on a monthly basis.

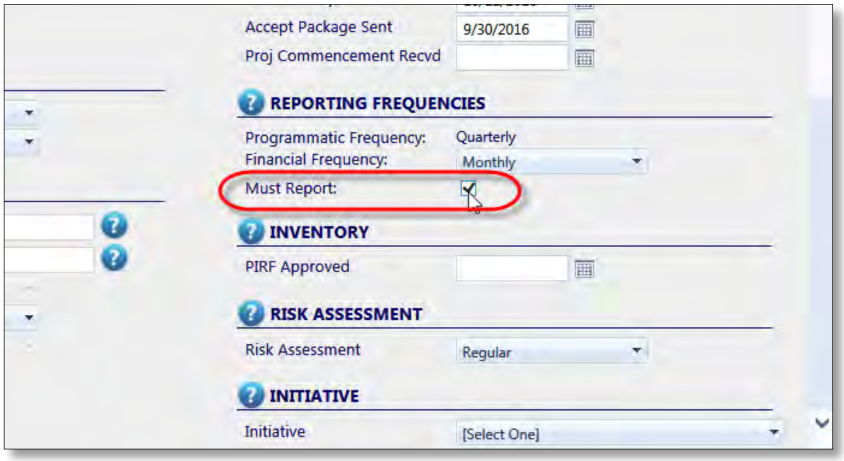


Figure 250 – "Must Report" Checkbox appears on Face Sheet

NOTE: *For more detailed information on requiring monthly reporting, please refer to Section 7.8.9.1 – How to Require Monthly Financial Reporting.*

7. When making changes to reporting frequencies, remember to scroll back up to the top of the face sheet and click the **Save** button.

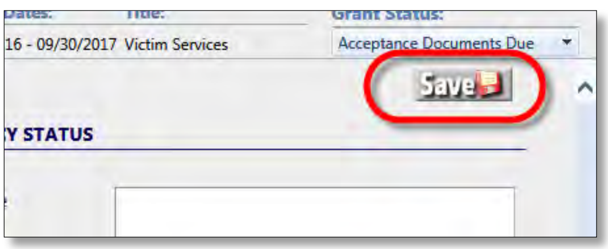


Figure 251 – Save Your Reporting Frequency Changes

7.6.4 Assign Funding Sources to a Grant Award (Based on Permissions)

1. Click on Funding in the Grant Menu.
2. Click and hold on the funding source in the Available Distribution Details panel.
3. Drag the source over to the Selected Distribution Details panel.

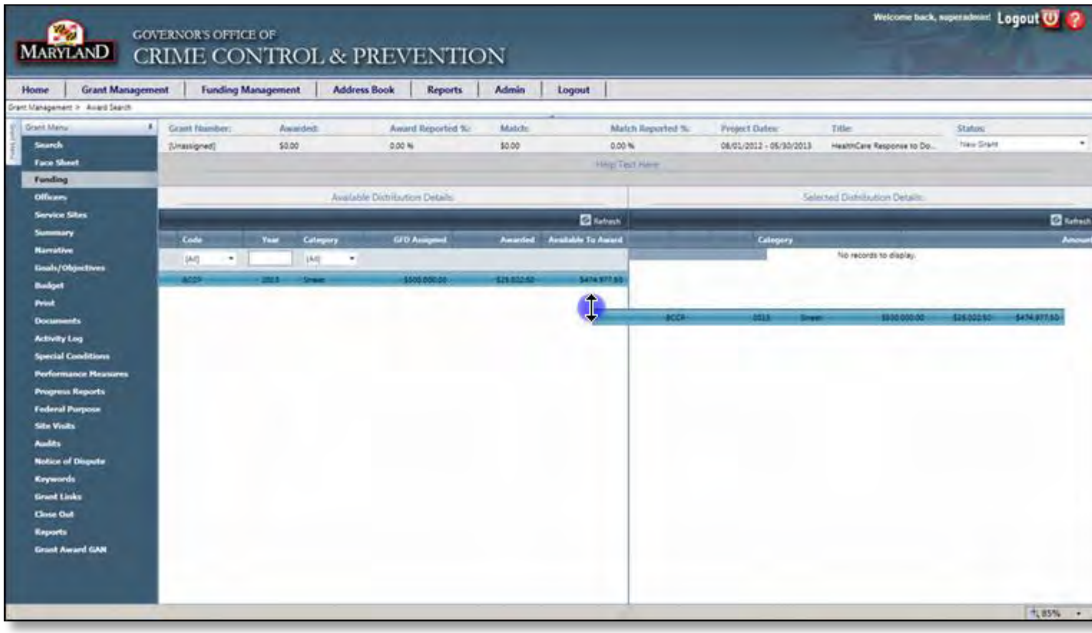


Figure 252 - Allocate Funding to a Grant Award

4. Enter the grant budget amount in the popup text box. This amount should match the value of the Awarded field in the Grant Award header panel in the figure above.

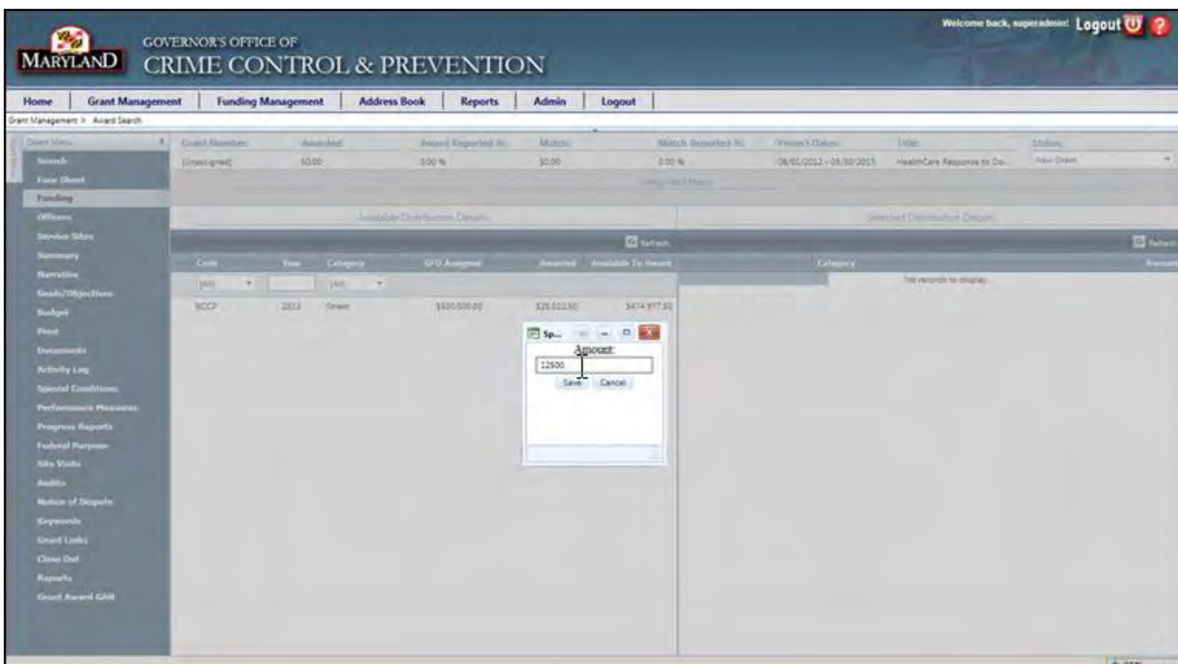


Figure 253 - Enter Allocation Amount for Grant Award

5. The funds distribution is now displayed in the Selected Distribution Details panel.

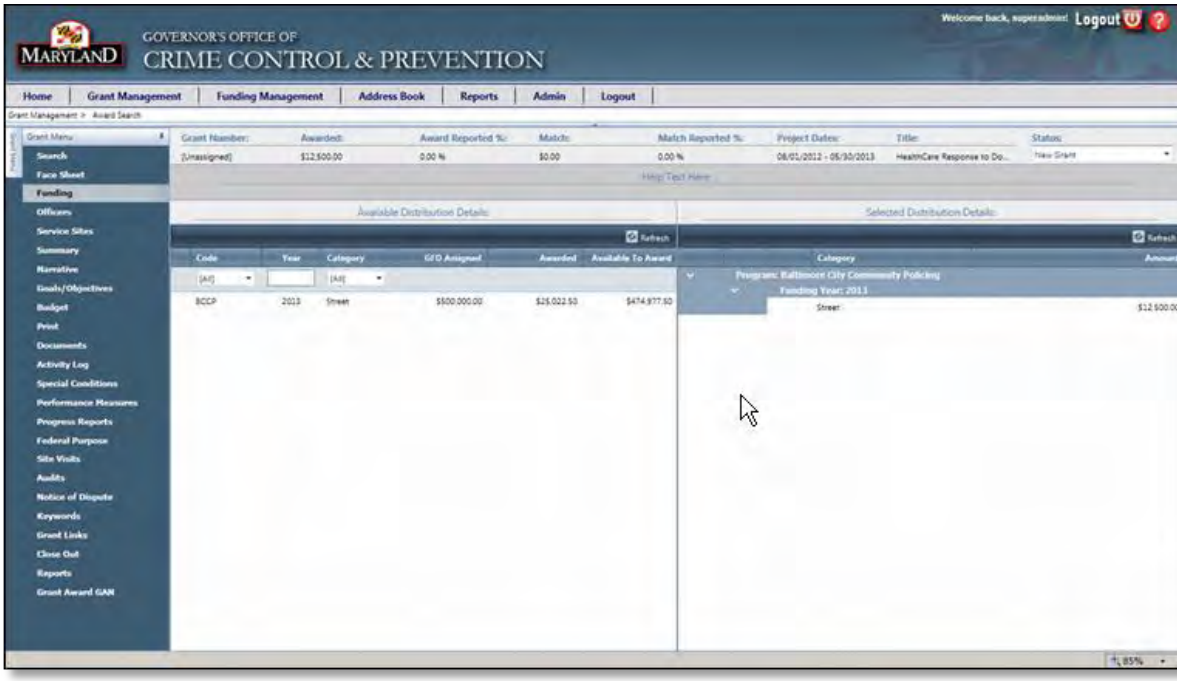


Figure 254 - Verify Funding Allocation Selection

7.6.5 Link Grant Awards (done by the Grants Manager immediately after Assigning Funding)

1. Click on Grant Links in the Grant Menu.
2. Click and hold on the grant you wish to link from the Available Grants panel.
3. Drag the item to the Selected Grants panel and release the mouse button.

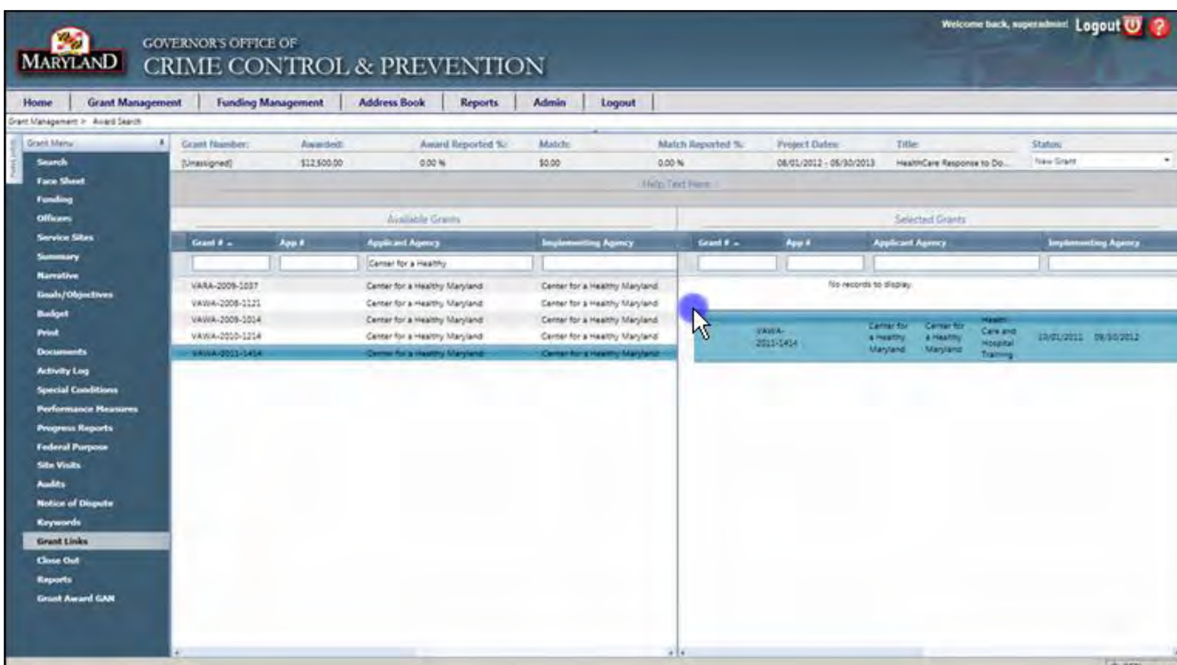


Figure 255 - Link Grant Awards

4. Click the Status drop-down list and select Funding Assigned.

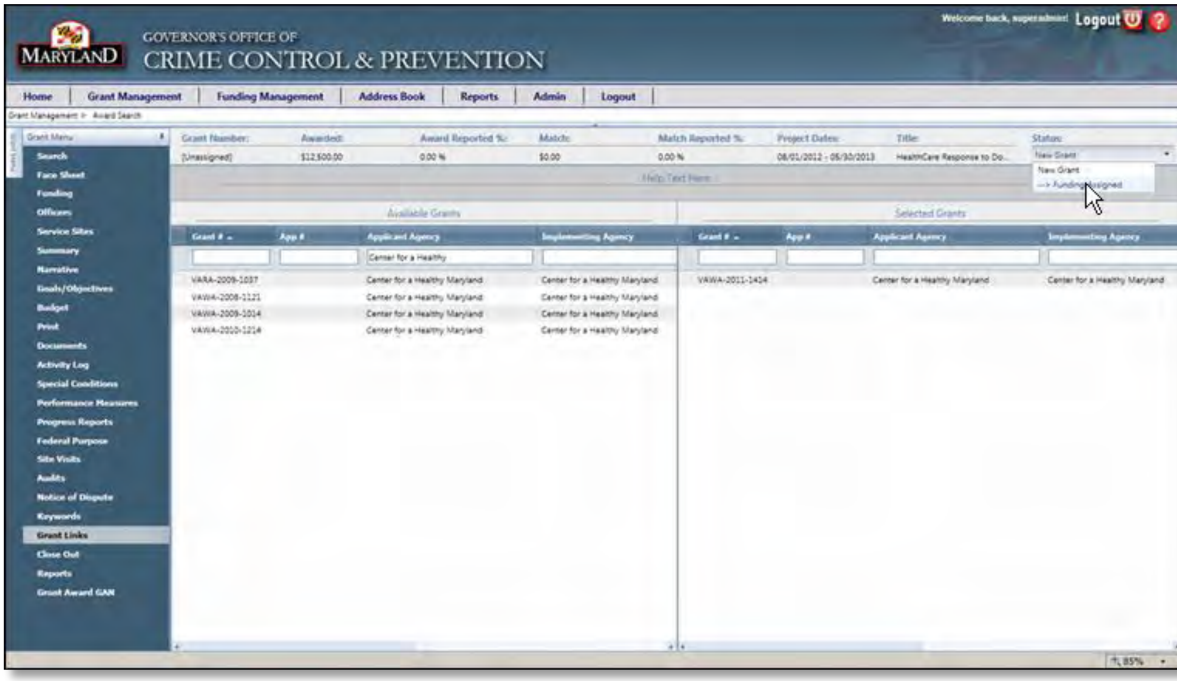


Figure 256 - Select Funding Assigned

5. You are taken back to the Award Search screen, showing only the grant you just approved. Click the magnifying glass to edit the grant.

6. The Status of the award is changed to Fund Mgr Packet Review

Figure 257 - Award Packet Pending Status Update

7. Click on the Documents tab in the Grant Menu to verify that the Authorized Official and Project Director award packets (without signatures) have been genereated once the funding was assigned.

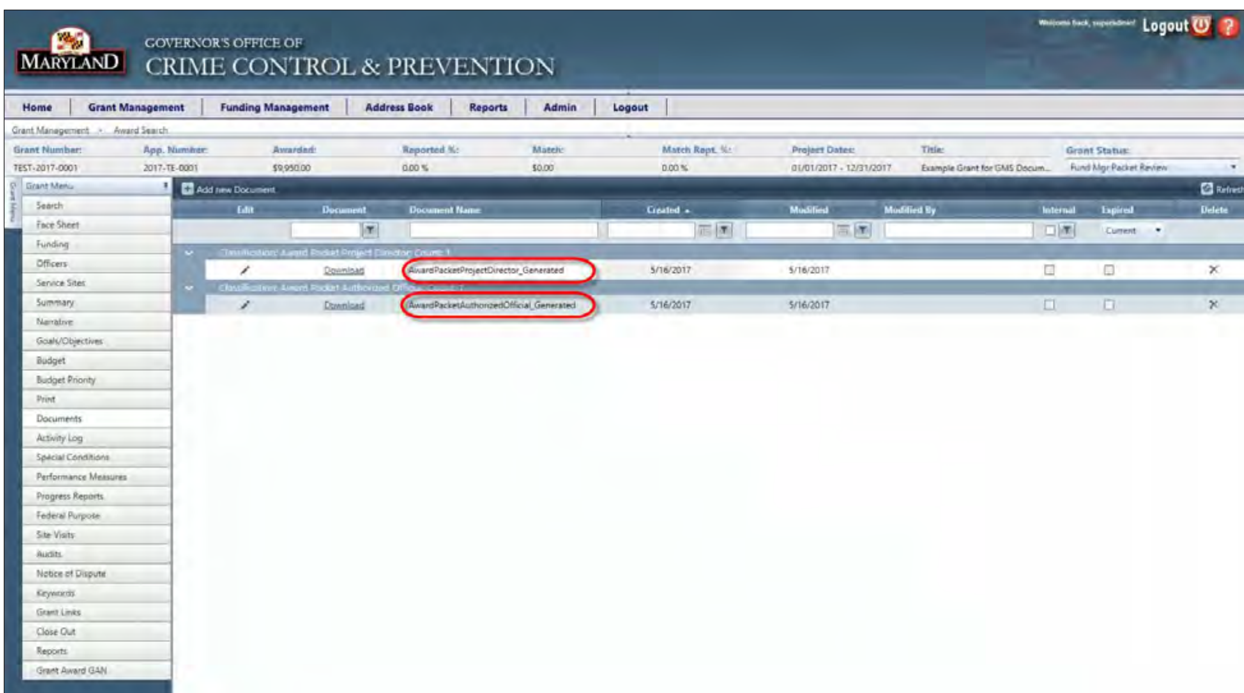


Figure 258 – AD & PD Packets (without signatures) Generated

8. Download and review packets to confirm no signatures.


Electronic *Financial reports* must be received within 30 calendar days after the end of each quarter. Revisions are allowed to be submitted up to 60 days after the end date of each quarter. Hard copies of financials, generated by the online software with an original signature in blue ink, also must be mailed to this Office. Electronic *Programmatic reports* must be received within 15 calendar days after the end of each quarter. Hard copies of programmatic reports are not required for this grant.

These revisions are **only** accepted if the initial quarterly report was submitted within the mandatory time frame noted above. Any request for changes or modifications to the project as awarded must be made **online**, using the Grants Management System.

If the purchase of furniture/equipment is part of this grant project and you are a governmental agency, it is required that such purchases are made by competitive bid or through your approved governmental procurement process and that inventory records be maintained.

Should you have any questions or need any clarification regarding this Award, **please have your award number when you call** so that you can be referred to the appropriate Regional Monitor **(Angela Carpintieri)** or Fiscal Team Member **(Felicia Bailey)**. This will enable us to provide you with technical assistance and information in a timely manner.

Sincerely,

Edward Parker

Funding Manager

cc: Mr. Edward Taylor

Figure 259 – AD & PD Packets (without signatures)

9. At this point the Funding Manager approves the grant by changing the Grant Status to Approve.

Figure 260 – Funding Manager Packet Review - Approve

10. The grant is transitioned to Funding Chief Packet Review. At this point the packets are generated again, but this time with signatures. Repeat step 7 to confirm that the packets now have signatures included.

11. The Funding Chief, upon inspecting the packets, now mails the award packets to the sub-recipient but selecting the Mail Awards Packets transition from the Grant Status menu.

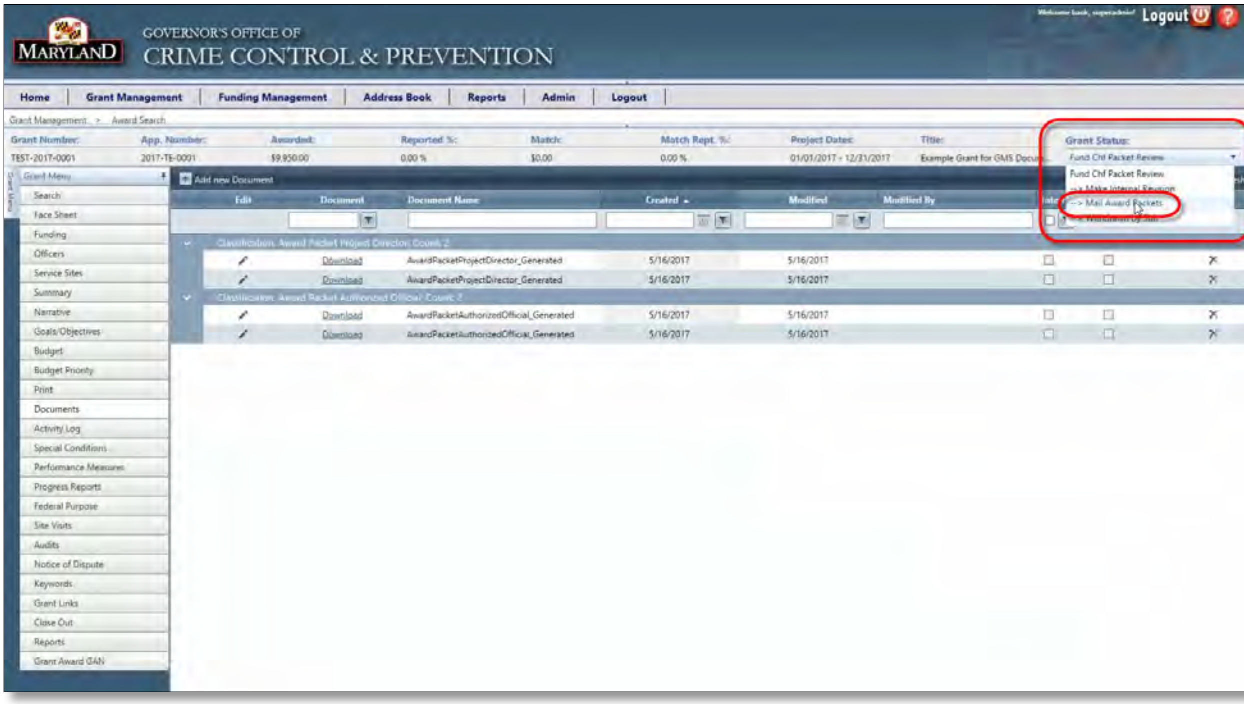


Figure 261 – Funding Chief Mails Award Packets to Sub-Recipient

12. You will receive a message on the screen notifying you that the AO and PD packets will be emailed. Click on the OK button to continue.

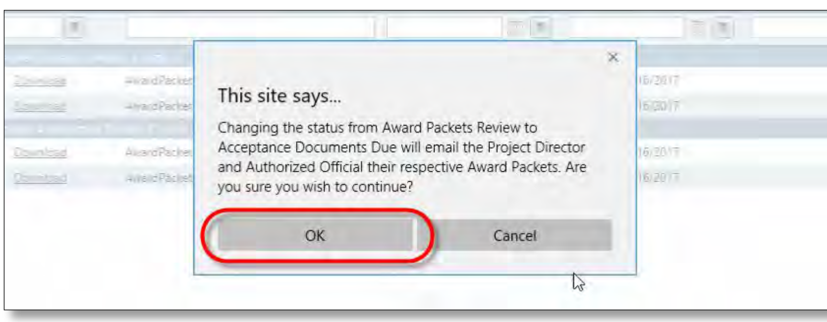


Figure 262 – Confirm Email of AO and PD Packets

13. The status changes to Acceptance Documents Due.

Figure 263 - Acceptance Documents Due Status

14. When the sub-recipient returns the signed Award Acceptance and Project Commencement, the Control Desk Administrator will log this information by completing the Award Dates fields and clicking SAVE, then changing the status to "Acceptance Documents Received".

    - Note: The Award Accepted and Project Commencement Received dates must be entered in order to change the status to "Acceptance Documents Received".

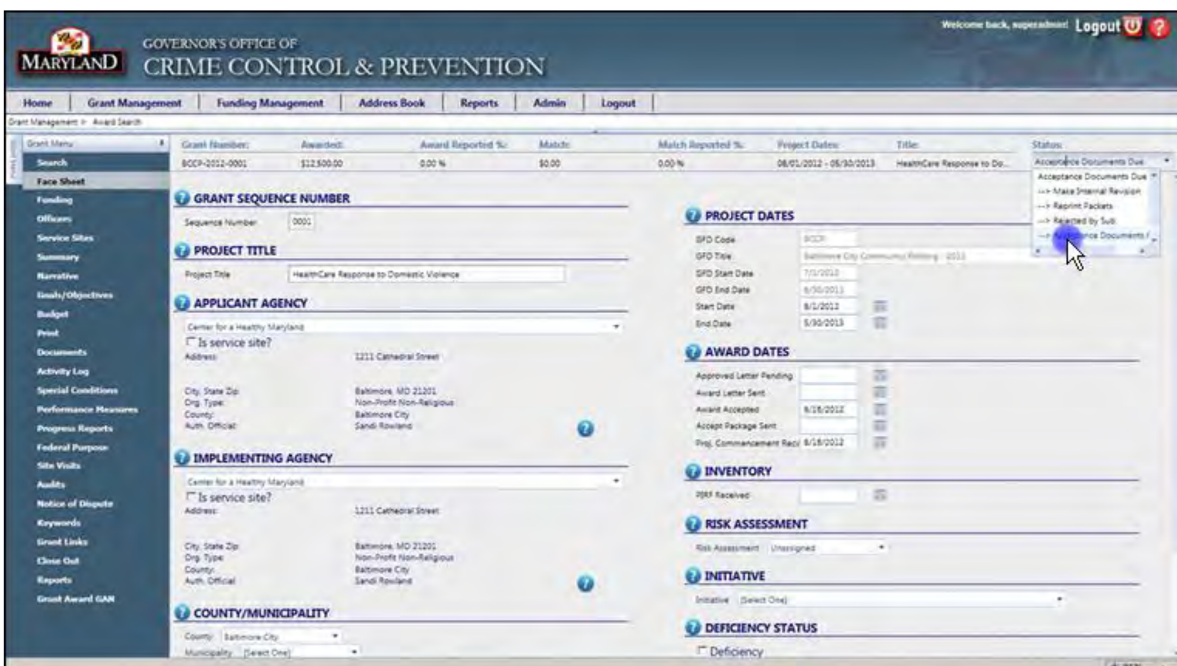


Figure 264 - Change Status to Acceptance Documents Received

15. The new award is now in compliance.

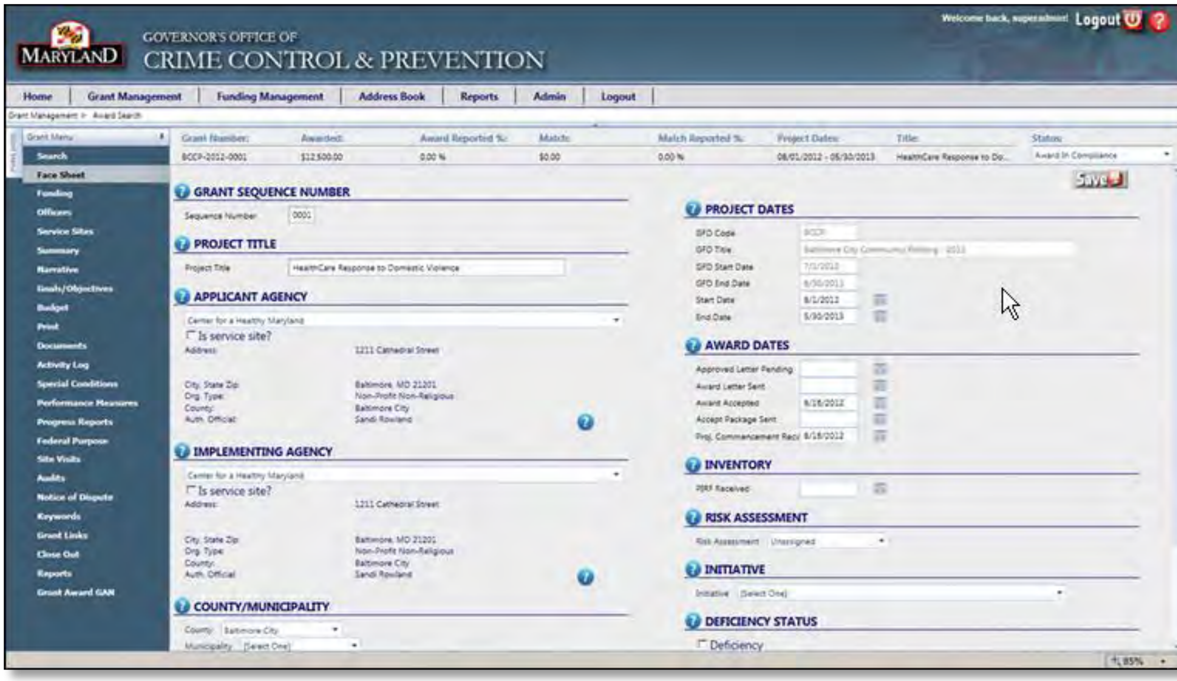


Figure 265 - Award in Compliance

7.6.6 Deny a Grant Application

If the decision is made to deny the grant application, Program staff will forward the required paperwork to the Grants Manager. The following is required: "Application – Denied Funding" form, a copy of the denial letter (from the Executive Director), the original application, and all other review paperwork. The Grants Manager will change the application status to "Deny Application".

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter.

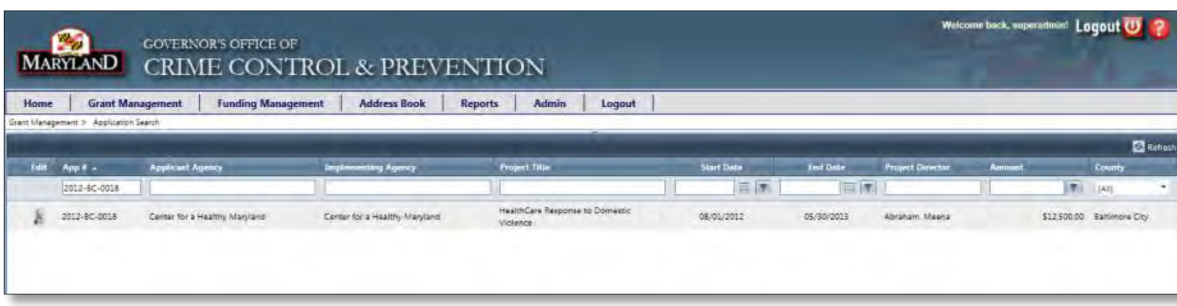


Figure 266 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.

3. To deny the application, change the Status of the application to "Deny Application".

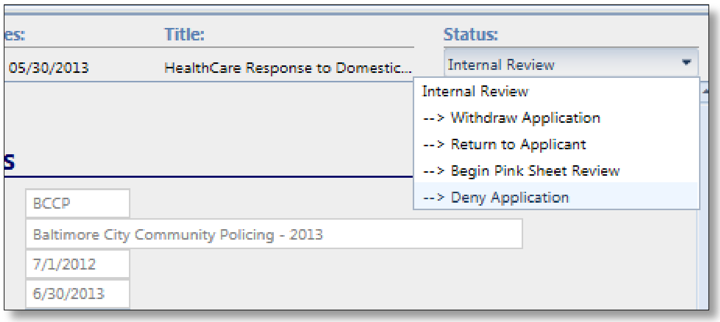


Figure 267 - Change Application Status to Deny Application

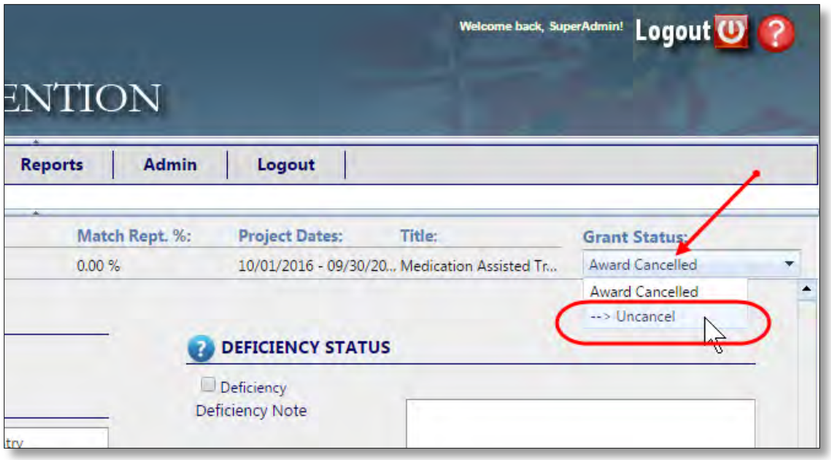
The status of the application will change to "Application Denied".

7.6.7 Uncancel a Cancelled Grant Award

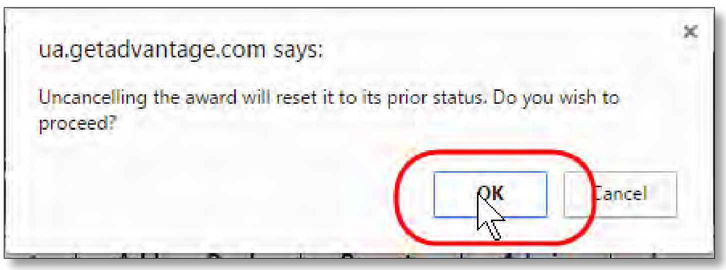
You can uncancel a cancelled grant award. Doing so will return it to it's previous status.

1. Locate the cancelled grant award in the award search screen, then click the **Edit** magnifying glass icon to edit the award.

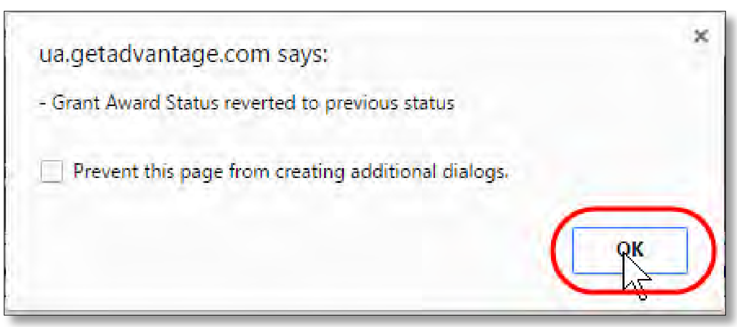
2. At the Face Sheet, click on **Award Cancelled** in the Grant Status drop-down menu, then click on **--> Uncancel**.



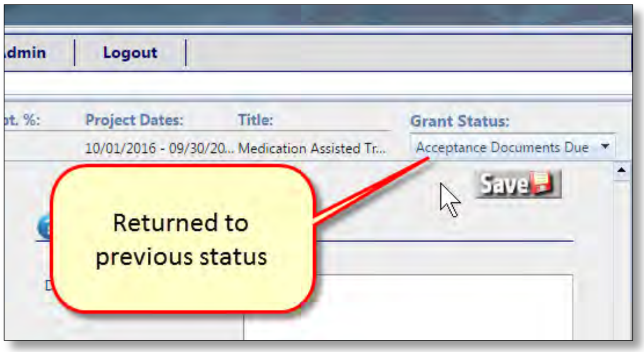
3. A confirmation dialog box appears. If you click Cancel, the award will remain cancelled. If you click OK, the award will be uncancelled.



4. A confirmation dialog appears to confirm that the grant award status was reverted to its previous status. Click the OK button.



5. The previous status of the award is shown in the Grant Status drop-down menu.



7.7 Searching for a Grant Award

If a grant award you are searching for is not displayed in your Awards dashboard on the GMS Home Page, you can see a full listing of awards by accessing the Award Search screen from the Grant Management menu:

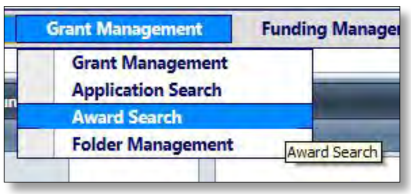


Figure 268 - Access Grant Management -> Award Search

The Award Search screen is displayed. It contains more fields than the Awards dashboard, and allows you to view awards with all statuses.

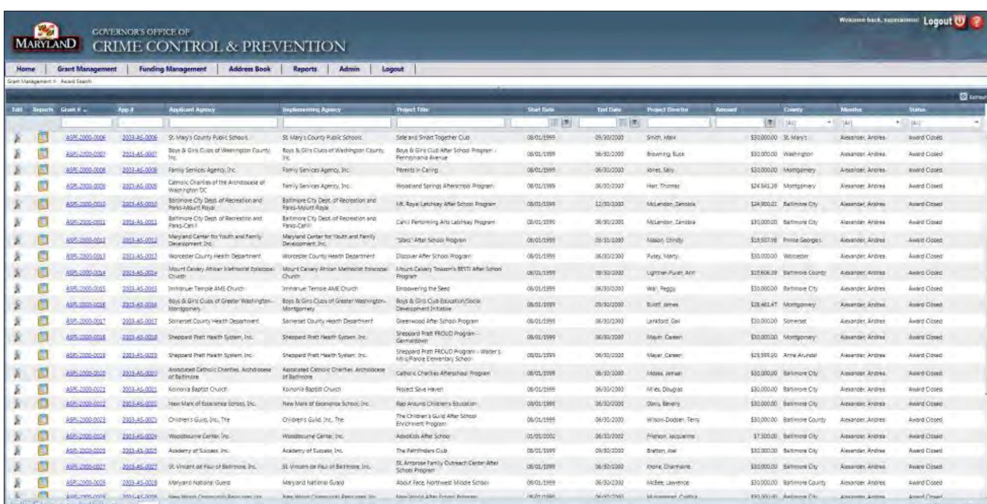


Figure 269 - GMS Grant Award Search Screen

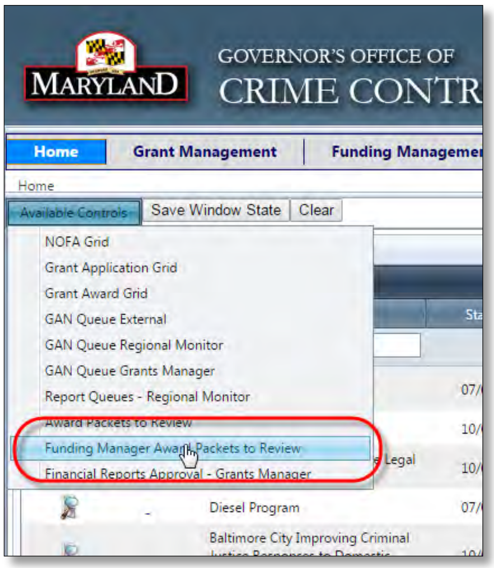
Please refer to the section ***Sorting, Filtering, and Searching for Records*** for help with finding a grant award.

7.8 Maintaining Grant Awards (Permissions Based)

7.8.1 Accessing the Funding Manager Award Packet Review Dashboard

A dashboard has been added to GMS to make it easy for Funding Managers to review Award Packets and proceed with the sections below.

1. Click on **Home** page (not the original home page)
2. Click on **Available Controls**, and select **Funding Manager Available Packets to Review**.



3. In this example there are no packets to review, but normally this screen would be populated with packets that need to be review.

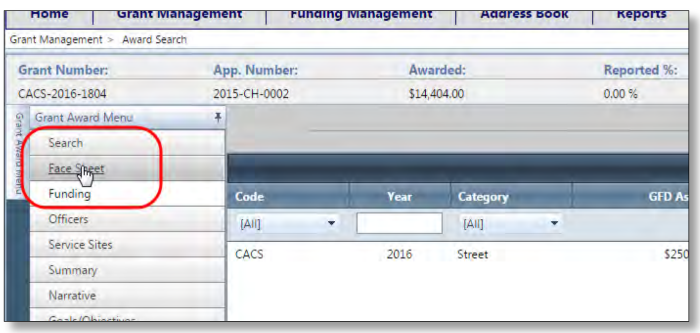
7.8.2 Define Financial Reporting Frequency (Accessibility based on permissions)

GMS Administrators can define the financial reporting frequency (monthly or quarterly) for every grant award so that financial reports and future notifications accurately reflect reporting deadlines and overdue reports.

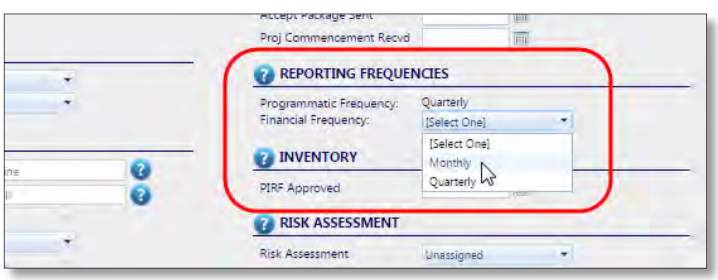
To define financial reporting frequency for a grant award:

1. Locate the grant award and click the icon in the **Edit** column of the grant award listing. You will automatically be taken to the Face Sheet of the selected Grant Award.

2. Or, if you are already viewing/editing a specific grant award, click **Face Sheet** in the Grant Award Menu.



3. Click the drop-down list under **Reporting Frequencies** and select **Monthly** or **Quarterly**.



4. Scroll to the top of the Face Sheet and click the **Save** button.

7.8.3 Perform Financial and Programmatic Reporting

Access the GMS programmatic reporting tools to complete and submit the regular report forms (Performance Measurements, Progress Reports, and Financial Reports) required by GOCCP for grant award compliance.

In short, programmatic reporting involves the following steps:

1. Answer, Save, and electronically Submit Performance Measure Questions
2. Print hardcopies of your work, sign, and mail to GOCCP
3. Answer, Save, and electronically Submit Progress Report Questions
4. Print hardcopies of your work, sign, and mail to GOCCP

Financial reporting involves the following steps:

1. Complete, Save, and electronically Submit Budget/Financial Report
2. Print hardcopies of your work, sign, and mail to GOCCP

7.8.3.1 Access the Grant Award Reporting Tools

1. Locate the grant that you want to submit reports for in the Grant Awards Dashboard and click the magnifying glass in the Edit column for this grant.

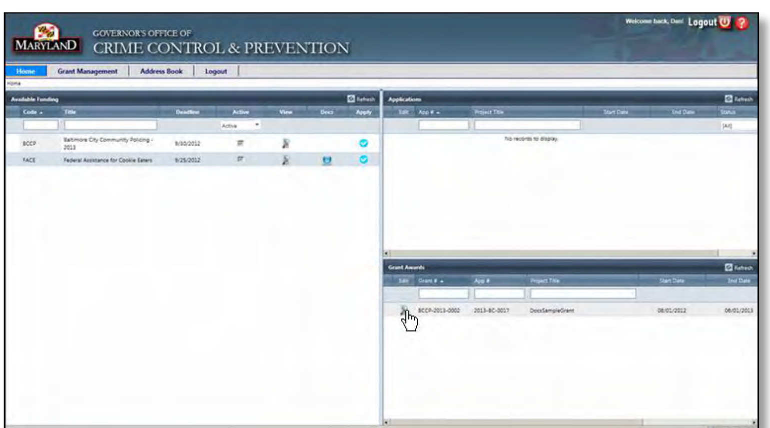


Figure 270 - Edit Grant Award

2. This takes you to the Grant Award screen, which is displayed in two panels:

- On the left is the Grant Award Menu, which displays a list of categories of information specific to the grant award you selected from my home page.
- Clicking on any category displays detailed information about your grant pertaining to that category in the right panel of the screen.
- By default, this screen takes you to the Face Sheet item in the Grant Award Menu.

Figure 271 - Grant Award Menu and Process Area

3. Click on the Reports category in the Grand Award Menu to access the programmatic reporting tools.

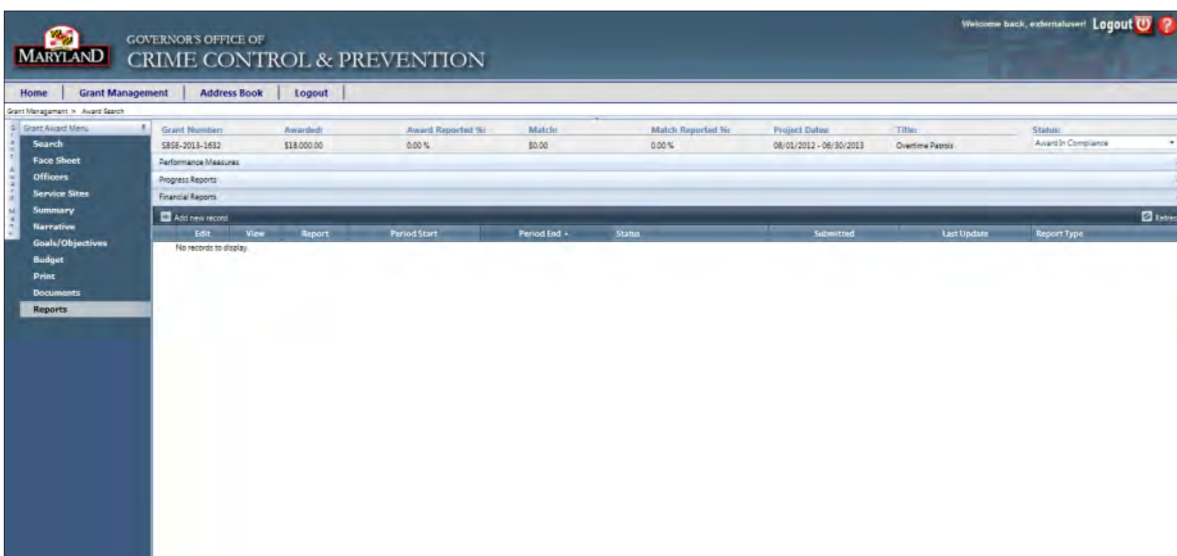


Figure 272 - Grant Award Menu - Reports Item

The types of reports you'll submit to keep your grant award in compliance are highlighted in light blue in the panel on the right. In general you'll need to submit three types of reports:

- Performance Measures
- Progress Reports

- Financial Reports.

NOTE: When performing programmatic and financial reporting, you use the Add New Record feature under each category to add new reporting entries. Once you've added a new record, if for any reason you need to delete the entry and start over by adding a new one, you can delete the record you just added by clicking the X icon in the Delete column, as shown below. You must do this prior to submitting the entry for review.

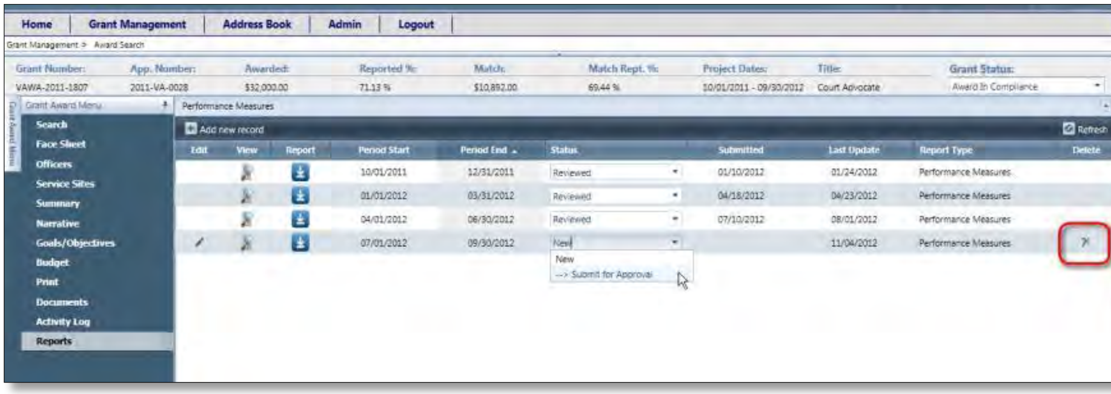


Figure 273 - Deleting a Newly Added Record (Must delete before submitting for approval)

7.8.3.2 Answer, Save, and Submit Performance Measure Questions

1. Click on the Performance Measures bar highlighted in light blue in the process area to expand the section.

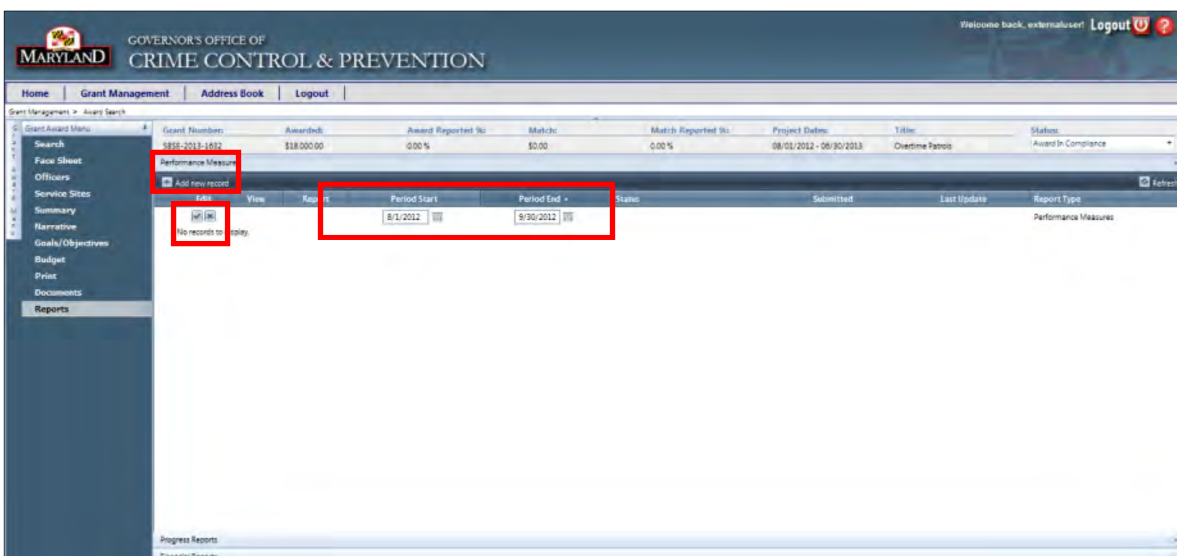


Figure 274 - Add New Performance Measure Record

2. Click on the Add New Record icon to add a new Performance Measures record.
3. The system automatically fills the period start and end date. The period start date is the first day of the first month of the quarter you're reporting. The period end date is the end date of the

standard quarterly reporting period (which may be less the 3 months if the project started in the middle of one of the standard reporting periods) or the project end date, whichever is sooner.

4. Click the checkmark to save the dates. Doing this adds a new record for the reporting quarter.
5. Click on the Magnifying glass icon in the View column of the record you just added to view the performance measure questions.

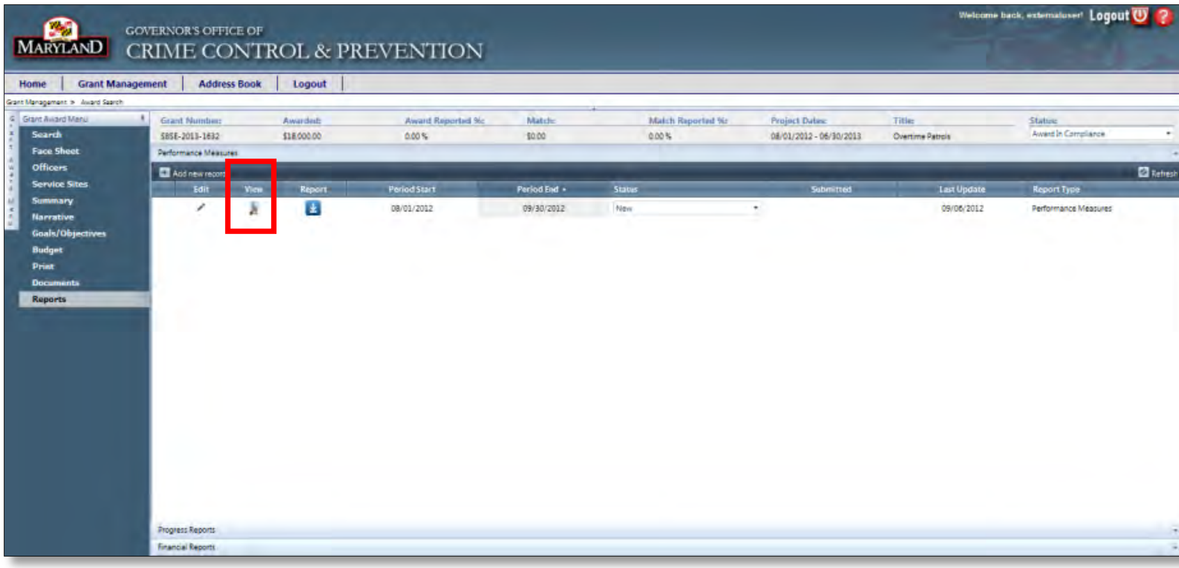


Figure 275 - View New Performance Measure Record Detail

6. Provide answers to the questions, and click the Save button when you're done.

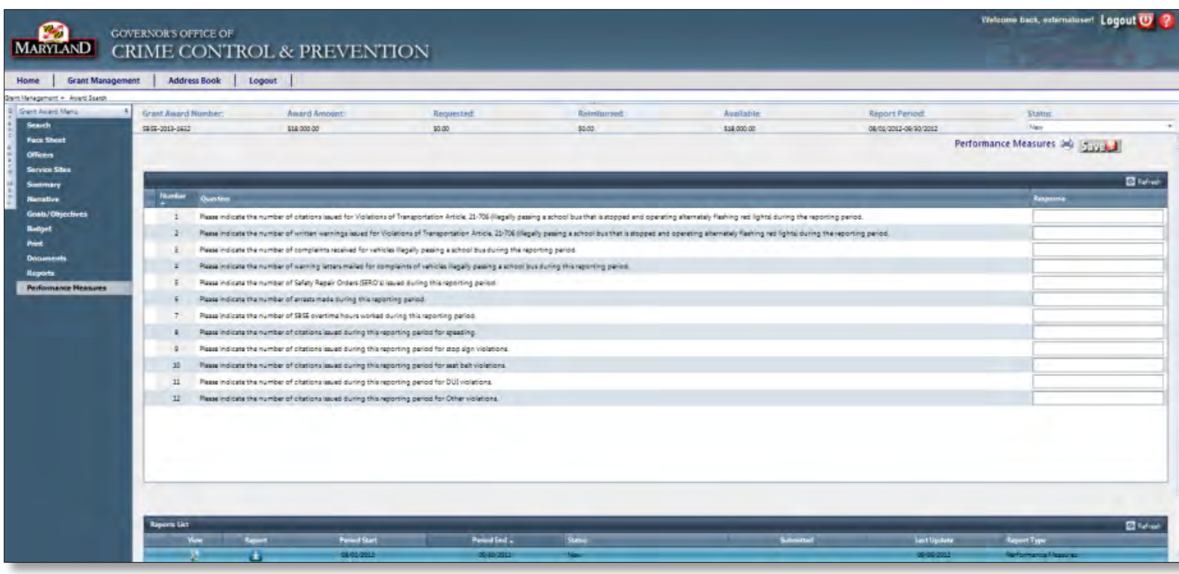


Figure 276 - Answer Performance Measure Questions

7. Submit your completed quarterly Performance Measures for approval by clicking the drop-down list under the Status column and select "Submit for Approval". After doing this, the Status will change to Submitted.

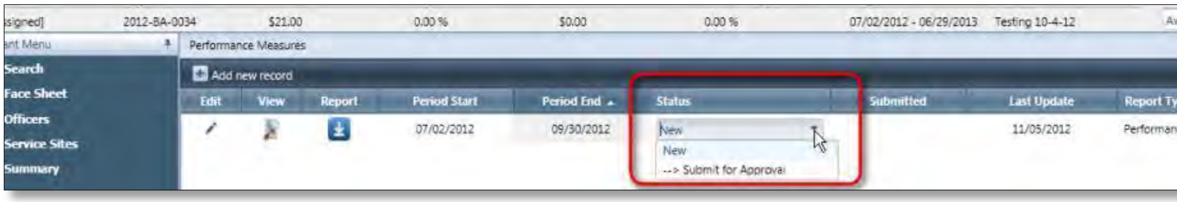


Figure 277 - Submit Performance Measure Questions for Approval

7.8.3.3 Answer, Save, and Submit Progress Report Questions

1. Click on Reports in the Grant Award Menu to return you to the Reports process area screen.

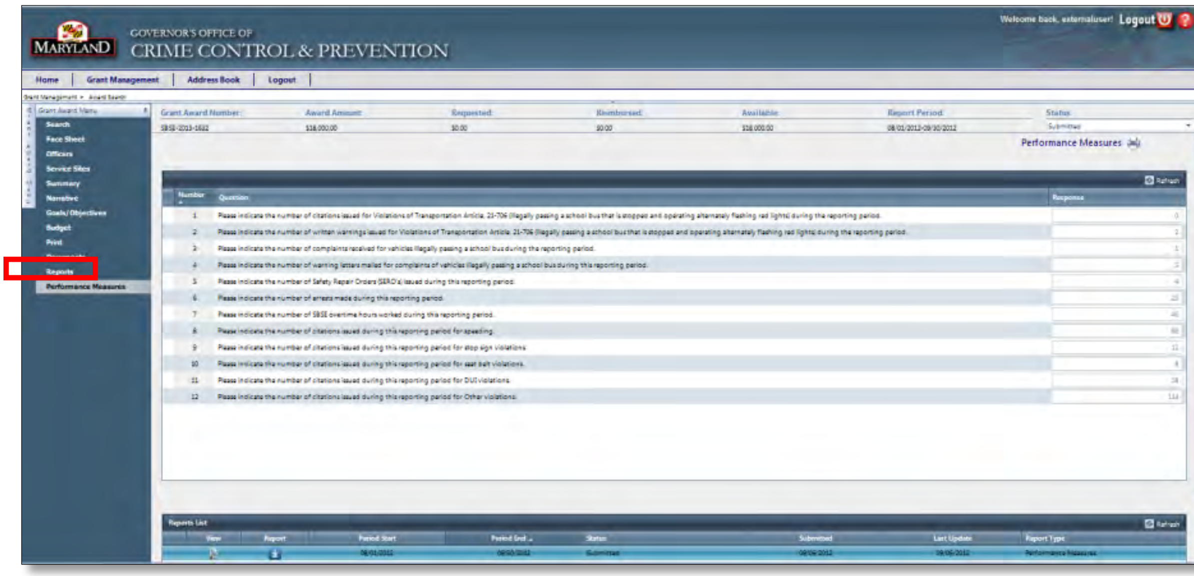


Figure 278 - Access Grant Award Menu Reports

2. Click on the Progress Report bar highlighted in light blue in the process area to expand the section.

Figure 279- Click on the Progress Report bar highlighted in light blue to expand the section

3. Click on the Add New Record icon to add a new Progress Report record.

4. The system automatically fills the period start and end date. The period start date is the first day of the first month of the quarter you're reporting. The period end date is the end date of the standard quarterly reporting period (which may be less the 3 months if the project started in the middle of one of the standard reporting periods) or the project end date, whichever is sooner.

5. Click the checkmark to save the dates. Doing this adds a new record for the reporting quarter.

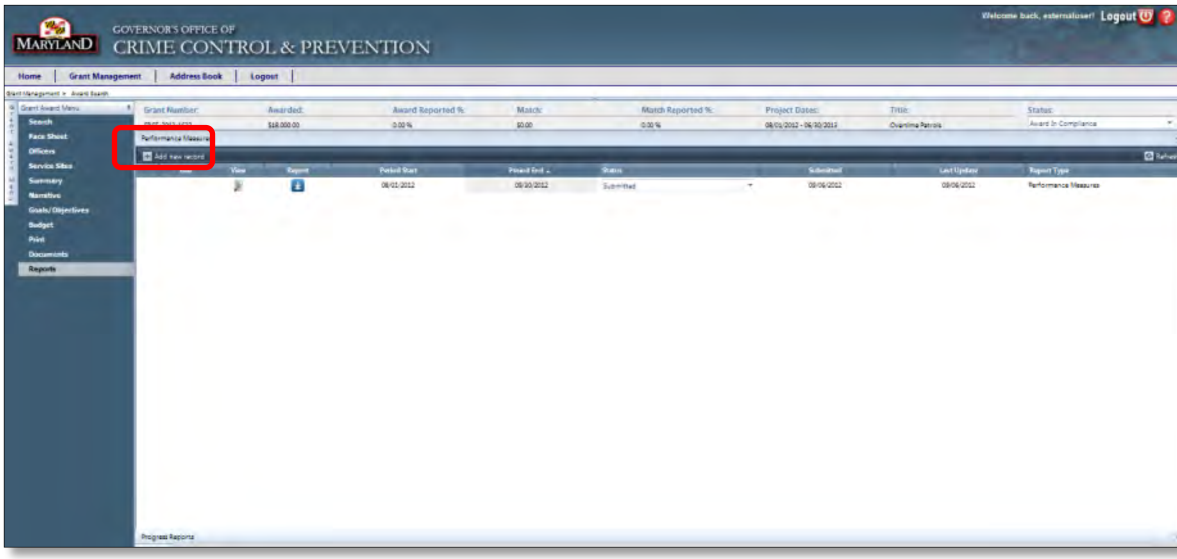


Figure 280 - Add New Progress Report Record

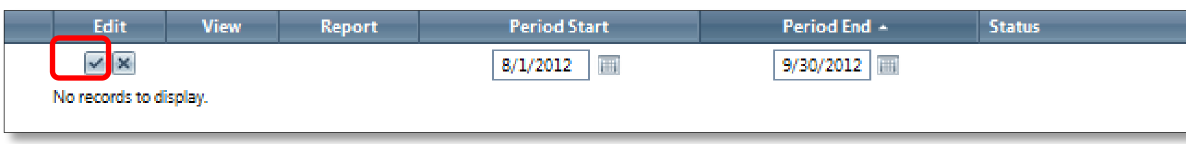


Figure 281 - Insert a new Progress Report

6. Click on the Magnifying glass icon in the View column of the record you just added to view the progress report questions.

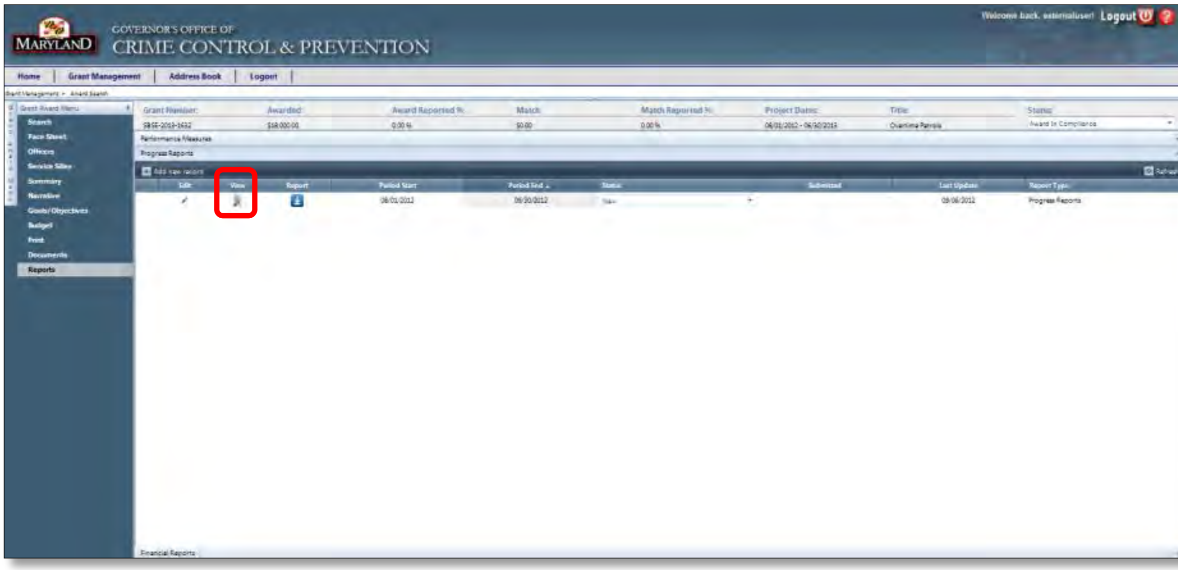


Figure 282 - Edit Progress Report Record Detail

7. Provide answers to the questions, and click the Save button when you're done.

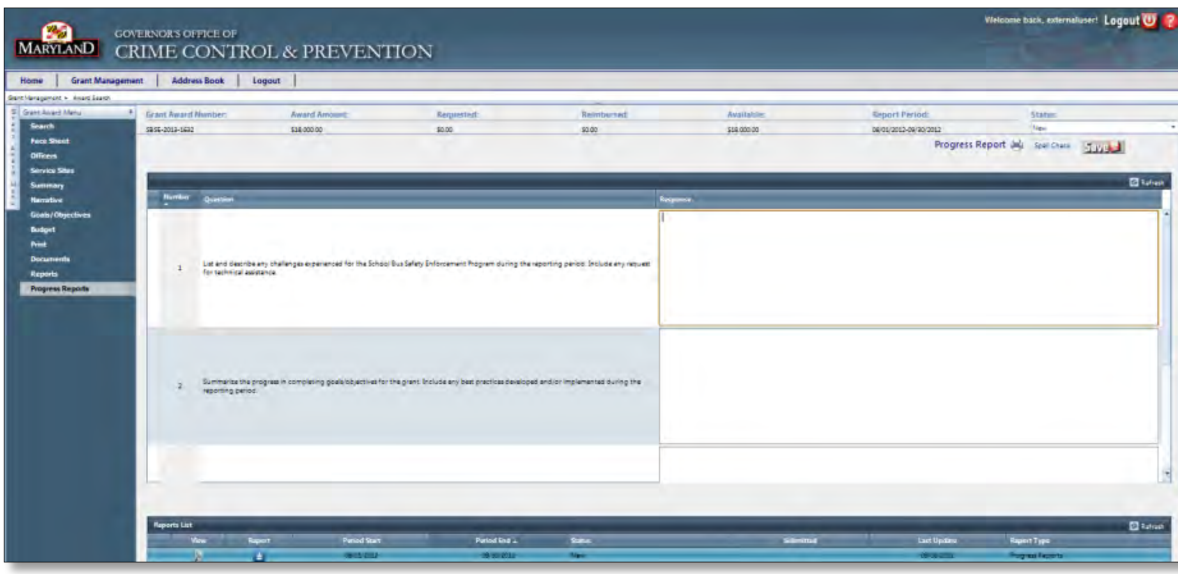


Figure 283 - Answer Progress Report Questions

8. Submit your quarterly Progress Report for approval by clicking the drop-down list under the word Status and select "Submit for Approval". After doing this, the Status will change to Submitted.

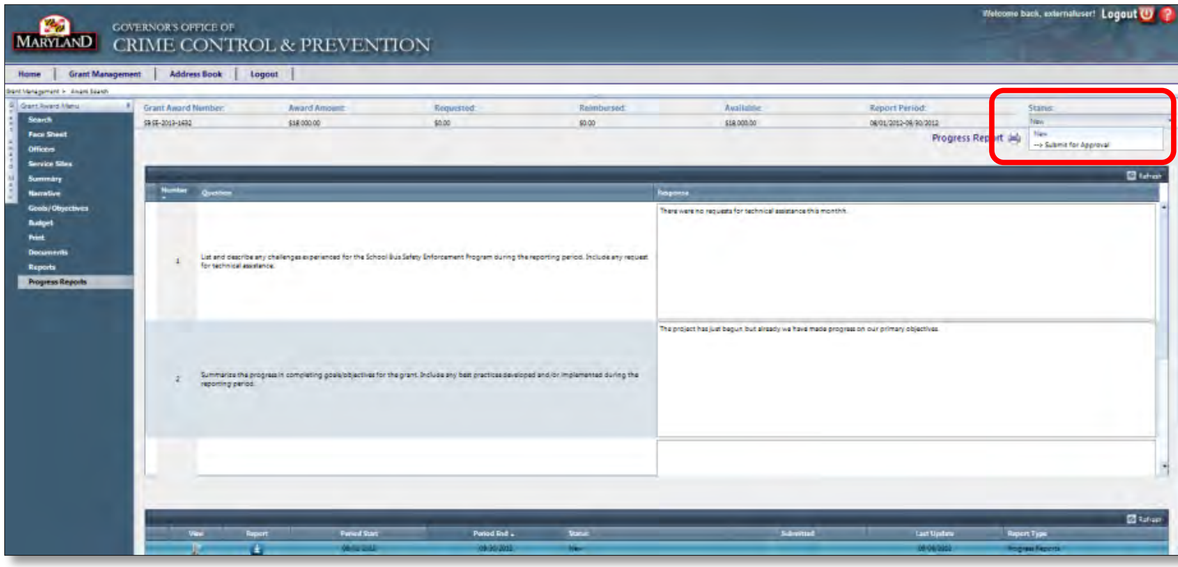


Figure 284 - Submit Progress Report Answers for Approval

7.8.3.4 Complete, Save, and Submit Financial Reports

1. Click on Reports in the Grant Award Menu to return you to the Reports process area screen.
2. Click on the Financial Reports bar highlighted in light blue in the process area to expand the section.

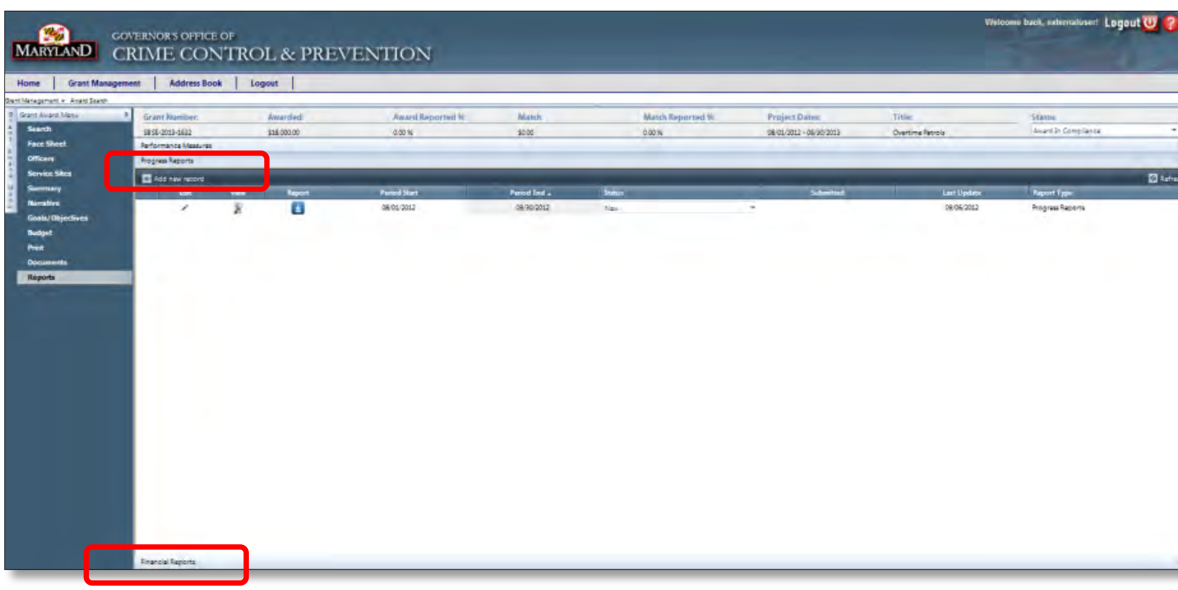


Figure 285 - Access Financial Reports Area

3. Click on the Add New Record icon to add a new Financial Report record.
4. The system automatically fills the period start and end date. The period start date is the first day of the first month of the quarter you're reporting. The period end date is the end date of the standard quarterly reporting period (which may be less the 3 months if the project started in the middle of one of the standard reporting periods) or the project end date, whichever is sooner.

5. Click the checkmark to save the dates. Doing this adds a new record for the reporting quarter.

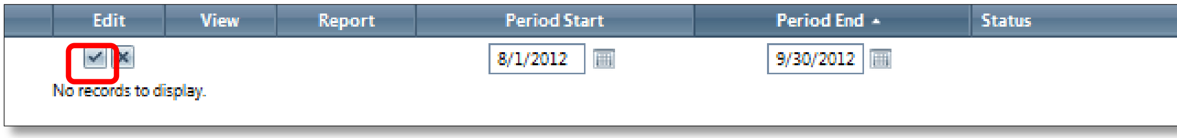


Figure 286-Insert new Financial Report

6. Click on the Magnifying glass icon in the View column of the record you just added to view the financial reporting area.

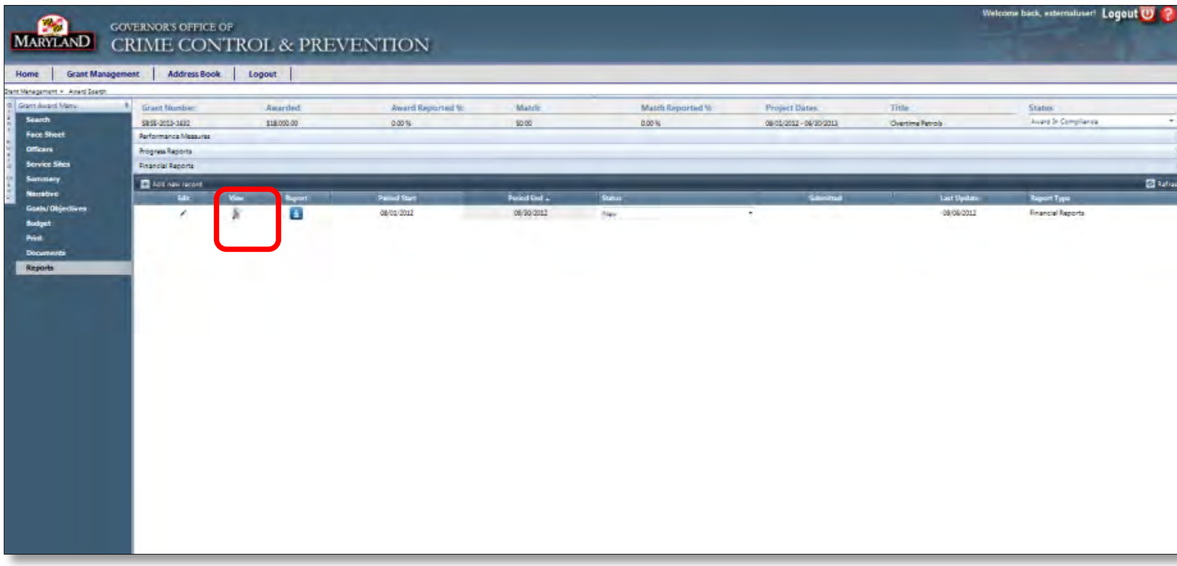


Figure 287 - Edit New Financial Reports Record

7. The Grant Financial Report area is displayed and shows each budget category that was chosen when applying for your grant in a list on the left hand side. Enter your quarterly expenses into the blank text boxes next to each applicable category.

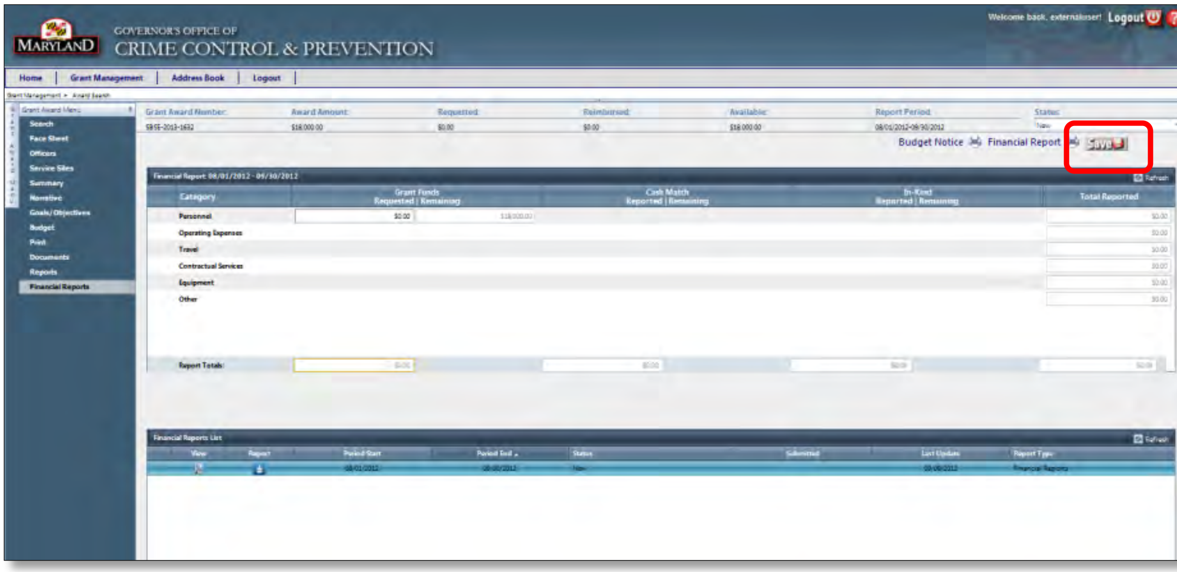


Figure 288 - Enter Budget Items into Financial Report

- In the example shown in this figure, the project is funded entirely by grant dollars, so text boxes are only available in the Grant Dollars section.
- If any of the funding for your project comes from Cash Match or In-Kind Match, text boxes will be available in those sections.
- Dollars entered for each budget category in each area are summed and displayed in the Total Reported column on the right side of the process area.

8. When you've completed entering your budget information, click the SAVE button, in the upper right corner, to SAVE your work. NOTE: If you do not click Save before moving to a different item in the Grant Award Menu, you will lose your work.

9. Submit your quarterly Financial Report for approval by clicking the drop-down list under the word Status and selecting "Submit for Approval". After doing this, the Status will change to Submitted.

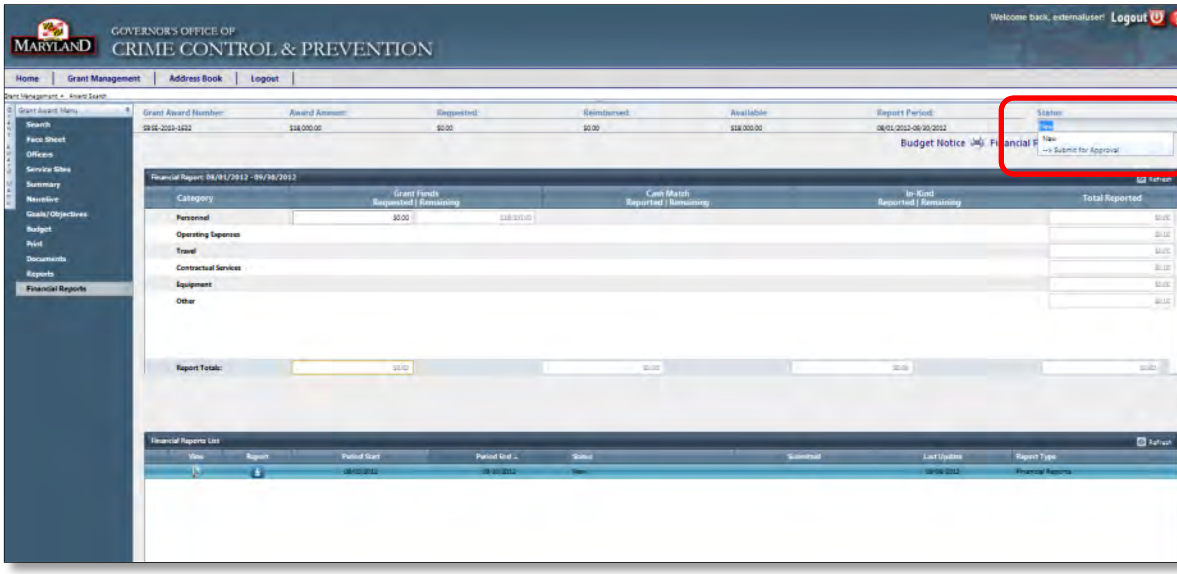


Figure 289 – Submit Financial Report for Approval

7.8.3.5 Print Programmatic Reports for Signature and Submission by Mail

The final step in Programmatic Reporting is to print, sign, and mail in your quarterly reports.

1. Click Reports in the Grant Award Menu to return to the Reports process area.
2. For each reporting category you completed, locate the record you just added and click on the Print icon in that record as shown in the figure below.

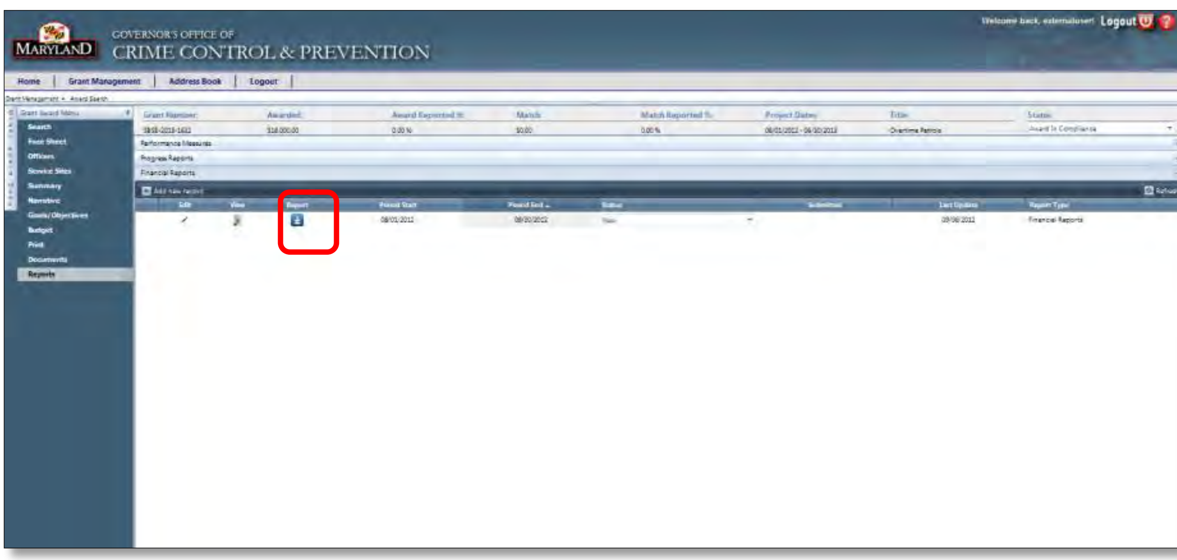


Figure 290 – Print Programmatic Reports

3. When your browser prompts you (as shown in the figure below) either click Save to save the PDF report to your hard disk or click Open to open the report in Adobe Acrobat.

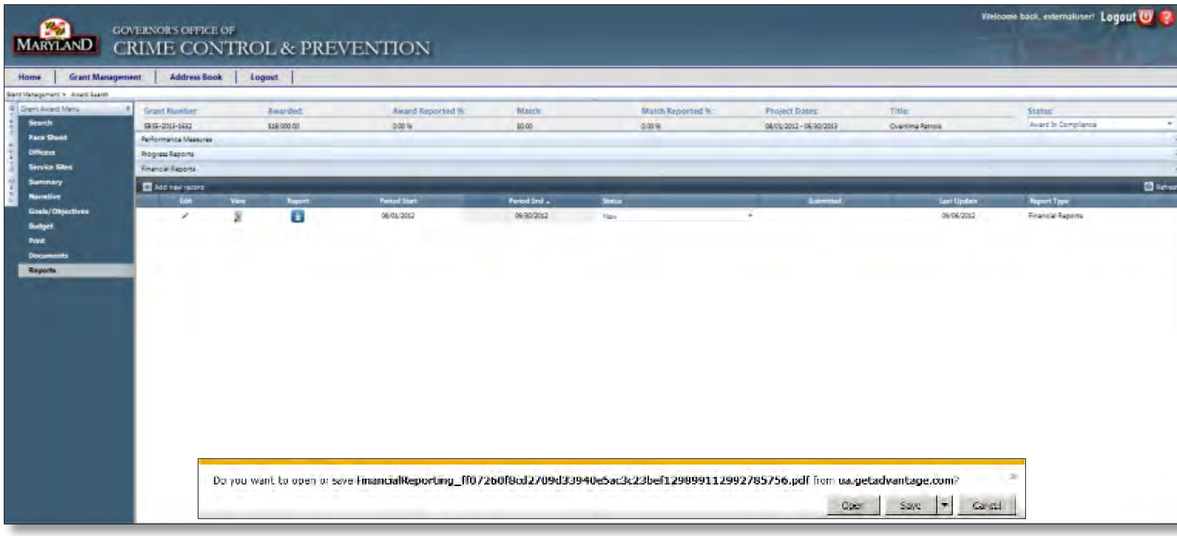


Figure 291 - Saving /Opening Programmatic Reports from Browser

4. Print your report, sign where applicable, and mail to GOCCP.

7.8.4 Create or Edit an Grant Award Activity Log Item

1. Click the Activity Log tab to highlight it.

2. Click Add new record below the Activity Log tab. Upon clicking *Add new record*, the data entry screen appears:

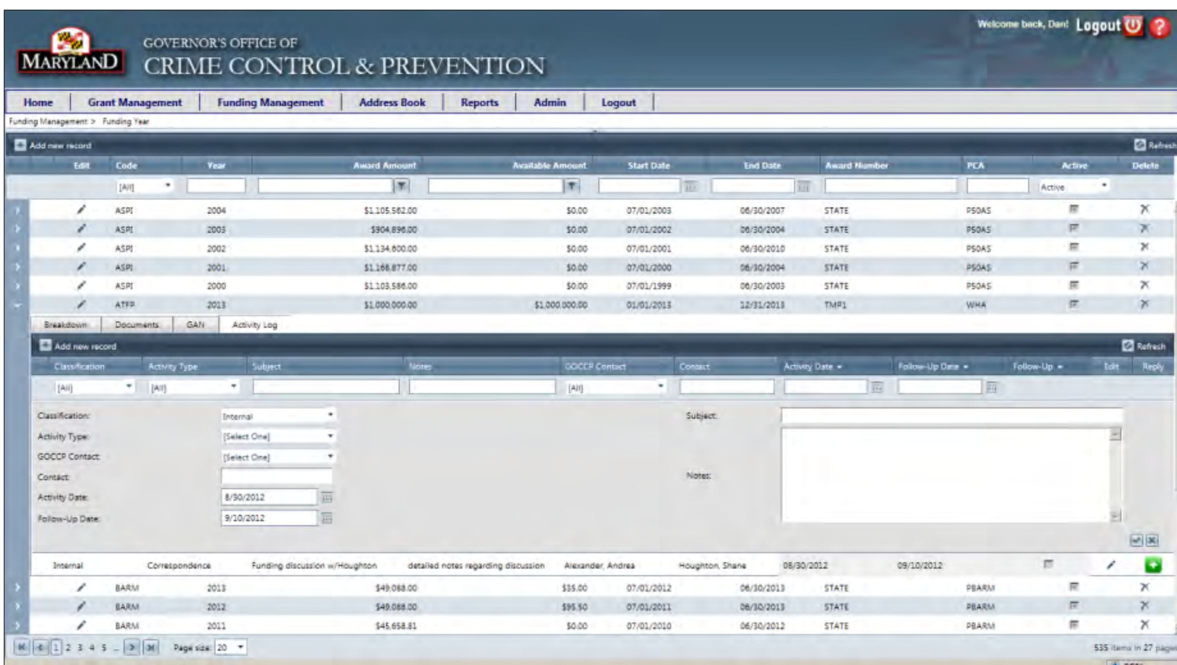


Figure 292 - Activity Log Tab - Data Entry Screen

3. Complete each field in the initial data entry screen for the new Activity Log record as follows:

ACTIVITY LOG TAB – "ADD NEW RECORD" FIELDS	
Classification	Click the dropdown list and select either **Internal** or **External**.
Activity Type	Click the dropdown list and select one of the following Activity Types: **Info Requested**, **Info Received**, **Sent Non-Funding**, **Correspondence**, **Phone Conversation**, **Site Visit**, **Application Notes**, **Meeting Note**, **Other**, **Email**, **Award Note**, **Close Out**, and **GAN**.
GOCCP Contact	Click the dropdown list and select the GOCCP contact relevant to this record.
Contact	Enter the name of the external contact (if applicable).
Activity Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Follow-Up Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Subject	Enter a brief description of the subject of this activity log entry into this field.
Notes	Enter any relevant notes regarding the activity into this field.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Activity Log record.

   To modify an existing Activity log entry, click the pencil icon in the Edit column, open and save. Where you see "more…." in blue, hover with your mouse to display the full Notes section.

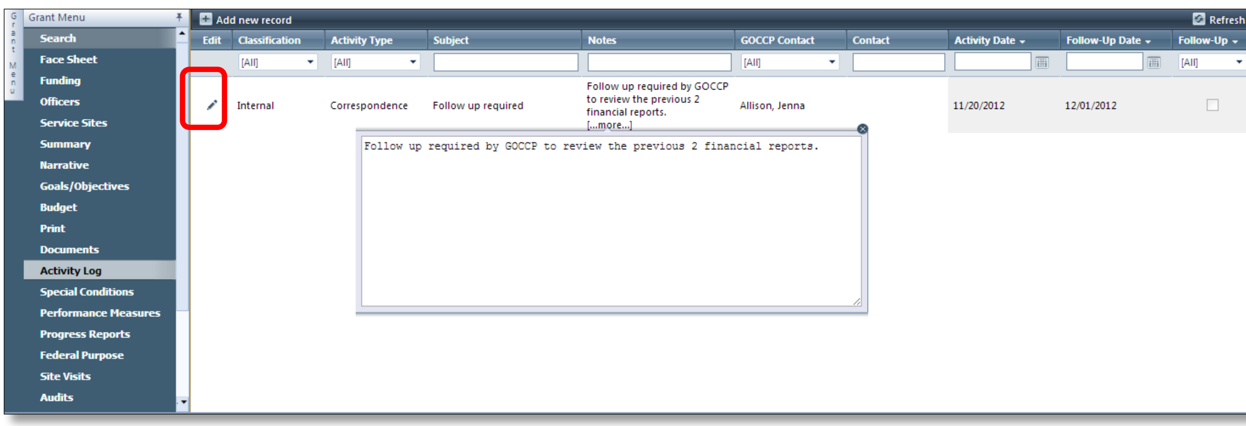


Figure 293 - Edit an existing Activity Log Entry within a Grant Award; see full notes without opening

7.8.5 Create a Grant Award Notice of Dispute

The Notice of Disputes page displays data pertaining to Disputes for the Award; you will soon see that Site Visits and Audits pages work similarly in functionality.

1. Click the Add New Record icon in the upper left section of the page to load a form the User can use to record details for new Notice of Disputes.

2. Use the form to enter calendar fields and free text fields to annotate:

- Period Begin Date - calendar feature
- Period End Date - calendar feature
- Notice Sent Date - calendar feature
- Dispute Sent To - Drop-down menu of recipient roles, Project Director, Fiscal Officer
- Dispute Type - Drop-down list of types allows multiple selections via check box
- Notes - free text field

- Additional Information - free text field
- Document Types – Indicates the type of document associated with the notice (Financial Report, Award Acceptance, etc)

Note: If you select the Dispute Type "Other", the resulting report will not include any text entered in the Notes field; it will include any text entered in the Additional Information field. If you select any other Dispute Type, the report will include text entered in the Notes field and not text entered in the Additional Information field.

3. At the bottom right of the data entry form is a check mark to save the record or an x to cancel the entry.

4. When the record is saved, Notice of Dispute Data displays in the window below the form (when a New Record is open) or at the top of the web page.

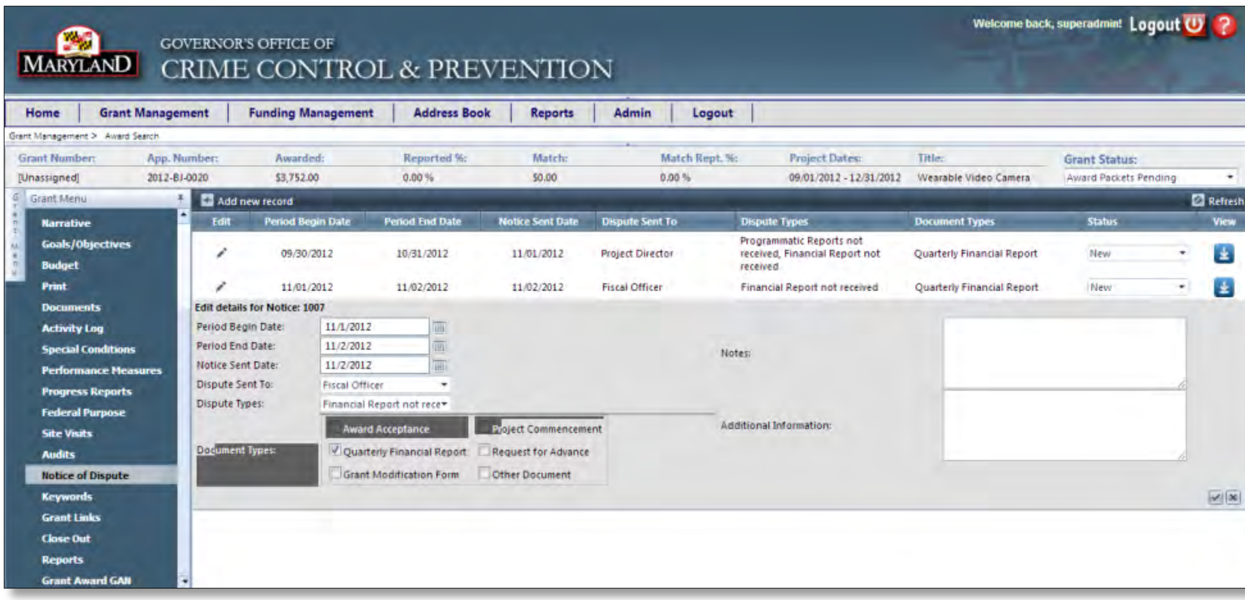


Figure 294 - Grant Award Notice of Disputes Screen

5. In the window above the data entry form, the User can view previous Notice of Dispute records.

6. To the right of Notice of Dispute listings are three features:
   a. From the drop-down Status menu that displays New for newly saved entries, which can be changed to Submit for Approval
   b. A View icon to save the record to your hard drive or to print the report
   c. An Edit icon to make changes to the record

7.8.6 Log Grant Award Site Visits

The Site Visit page displays data pertaining to Site Visits.

1. Click the Add New Record icon in the upper left section of the page to load a form the User can use to record details for new Site Visits.

2. Enter the data the form supports including calendar fields and free text fields to annotate:

- Assigned Date - calendar feature
- Initiated Date - calendar feature
- Site Visit Date - calendar feature
- Date of Report - calendar feature
- Monitor - drop-down menu of GOCCP staff names
- Narrative - free text field
- Comments free text field
- Recommendations - free text field

3. At the bottom right of the data entry form is a check mark to save the record or an x to cancel the entry.

4. When the record is saved, Site Visit Data displays in the window below the form (when a New Record is open) or at the top of the web page.

5. In the window below the data entry form, the User can view previous Site Visit records.

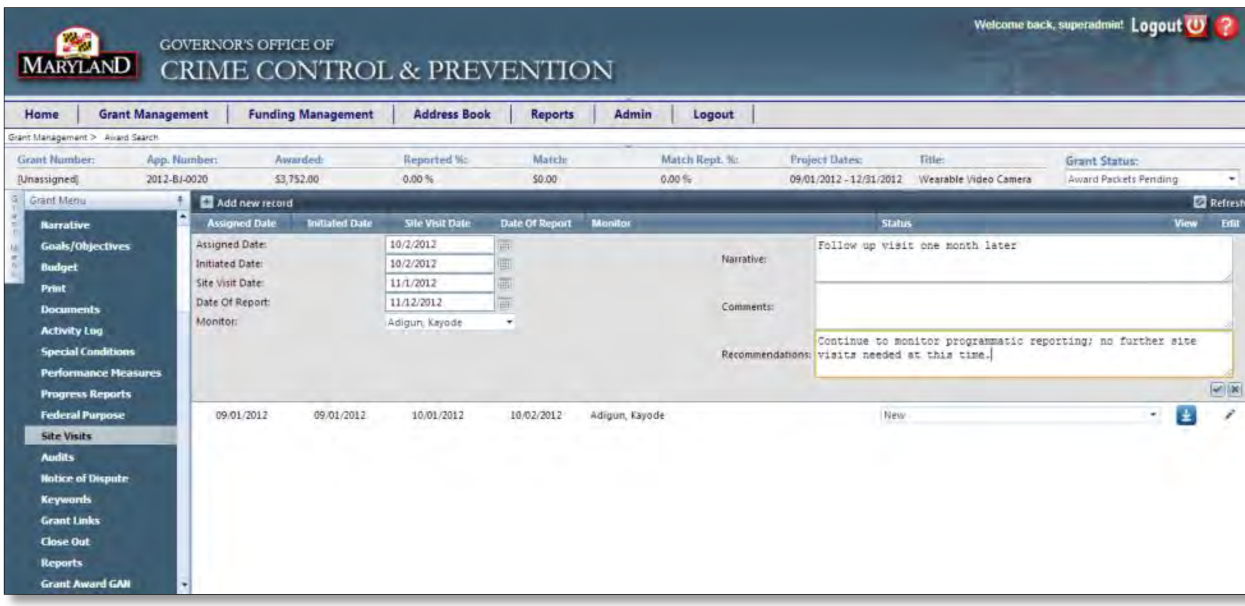


Figure 295 - Grant Award Site Visits Screen

6. To the right of Site Visit listings are three features:

    - A drop-down Status menu that displays New for newly saved entries, which can be changed to Submit for Approval, and Approved.
    - A Download icon to save the record to your hard drive or to print the report
    - An Edit icon to make changes to the record

7.8.7 Log Grant Award Audits

Similar to the Site Visits page in functionality, the Audits page displays data pertaining to Audits performed for the Award.

1. Begin by clicking the Add New Record icon in the upper left section of the page to load a form the User can use to record details for new Audits. The form supports calendar fields and free text fields to annotate:

    - Assigned Date - calendar feature
    - Initiated Date - calendar feature
    - Site Visit Date
    - Closing Letter Sent Date - calendar feature
    - Date of Report - calendar feature
    - Auditor - Drop-down menu of GOCCP staff names
    - Decision - Satisfactory or Unsatisfactory
    - Scope of Audit - free text field
    - Findings - free text field
    - Recommendations - free text field

2. At the bottom right of the data entry form is a check mark to save the record or an x to cancel the entry.

3. When the record is saved, Audit Data displays in the window below the form (when a New Record is open) or at the top of the web page.

4. In the window above the data entry form, the User can view previous Audit records.

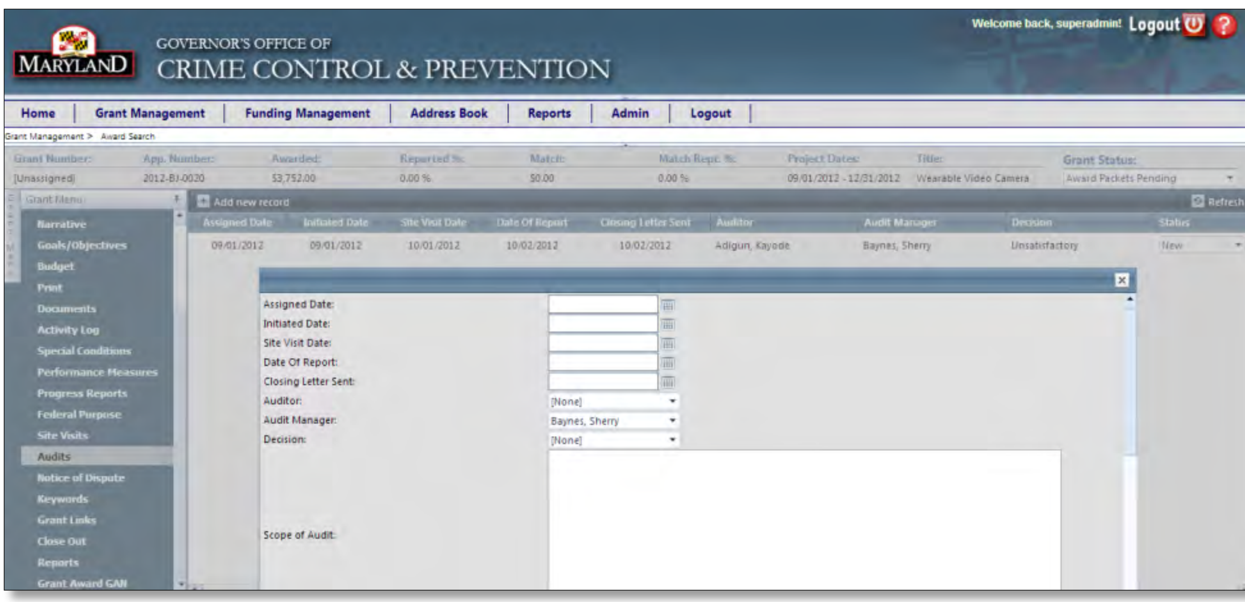


Figure 296 - Grant Award Audits Screen

5. To the right of Audit listings are three features:

- A drop-down Status menu that displays New for newly saved entries, which can be changed to Submit for Approval or Approved
- A Download icon to save the record to your hard drive or to print the report
- An Edit icon to make changes to the record

7.8.8 Create a Grant Award Grant Adjustment Notice (GAN) (Accessibility based on Permissions)

Use the online Grant Adjustment Notice (GAN) feature to make changes to your Grant Award directly within GMS:

- Create a General GAN to make changes to your grant's Start and End Date, Fiscal Officer, Project Director, Regional Monitor or Funding Manager.
- Create a Budget GAN to make revisions to your grant award budget.

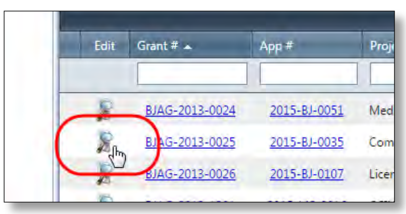
Use the procedure below to create a new GAN.

NOTES

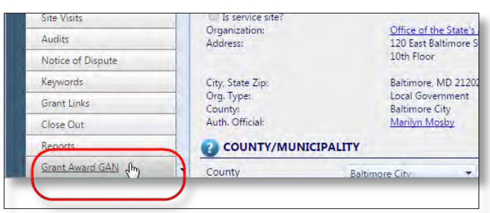
- You will create the GAN first, then you'll select whether it is a General or a Budget GAN.
- If you switch from General to Budget or vice-versa, you will lose any information you've input thus far
- You may only have one GAN of each type open at a time.
- When doing a budget GAN, if you change a salary, you must MANUALLY adjust the fringe benefits accordingly; they will not automatically adjust.

To add a new GAN:

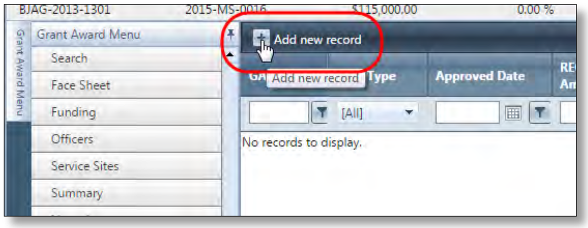
1. Locate the Grant Award for which you want to add a new GAN in the list of awards on the GMS Home Screen and click the Edit icon.



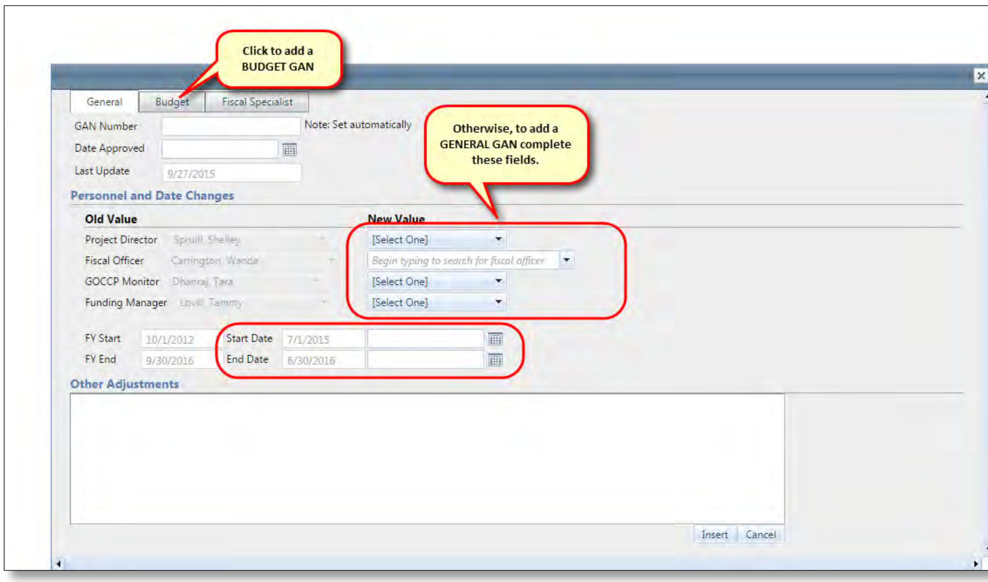
2. In the Grant Award Menu, scroll down and click on Grant Award GAN.



3. Click on Add New Record.



4. The GAN screen is displayed. If you are creating a BUDGET GAN, click on the **Budget** tab and skip to step 5. If you are creating a GENERAL GAN, continue with this step. NOTE: The **Fiscal Specialist** can only be changed by GOCCP internal staff, so you may not see that tab.

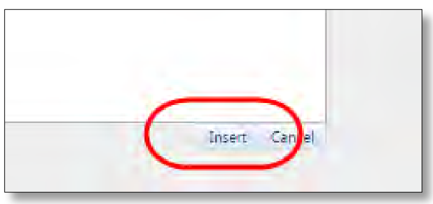


a. Complete the **Personnel and Date Changes** section, using the following table as a guide:

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	The date this GAN was approved will appear in this field.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this field.
Personnel and Date Changes	
Project Director	
Old Value	Display only: Displays the person currently assigned to the Project Director role for this Grant Award.
New Value	Select the new Project Director from the drop-down list.
Fiscal Officer	
Old Value	Display only: Displays the person currently assigned to the Fiscal Officer role for this Grant Award.
New Value	Click in this field and begin typing the first few letters of the last name of the fiscal officer you want to assign to this role, then select the name from the resulting list.

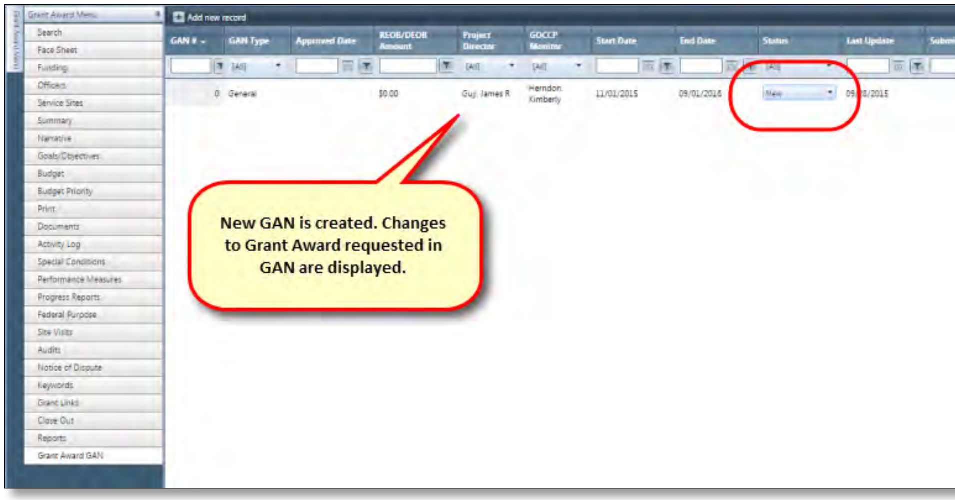
GOCCP Monitor	
Old Value	Display only: Displays the GOCCP staff member currently assigned to the Regional Monitor role for this Grant Award.
New Value	Select the new GOCCP Regional Monitor from the drop-down list. Can only be edited by Internal Staff
Funding Manager	
Old Value	Display only: Displays the person currently assigned to the Funding Manager role for this Grant Award. Only visible to Internal Staff.
New Value	Select the new Funding Manager from the drop-down list. Only visible to Internal staff.
Start Date	
Old Value	Display only: Displays the original Start Date of the Grant Award.
New Value	Enter the new Start Date for this Grant Award. NOTE: The New Start Date must occur ***on or after*** the value in the FY Start date box
End Date	
Old Value	Display only: Displays the original End Date of the Grant Award.
New Value	Enter the new End Date for this Grant Award. NOTE: The New End Date must occur ***on or before*** the value in the FY End date box
Other Adjustments	This is a free-form text field. Enter any other miscellaneous adjustments or amendments to the Grant Award based on this GAN.

b. When you're finished making changes to personnel and dates, click the **Insert** button below the Other Adjustments box to save your changes.

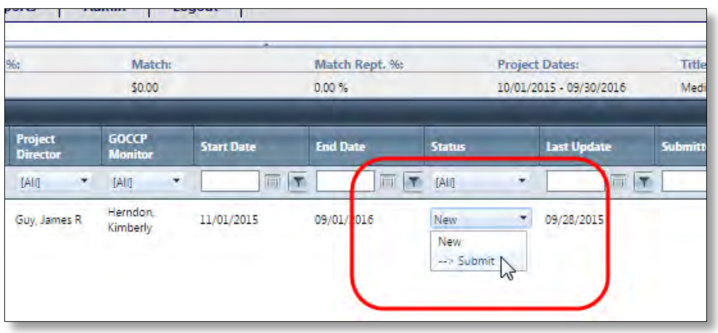


c. The GAN is created, and you are returned to the Grant Award Menu. The GAN record is displayed and shows the new dates and/or people assigned to roles that you requested in the GAN.

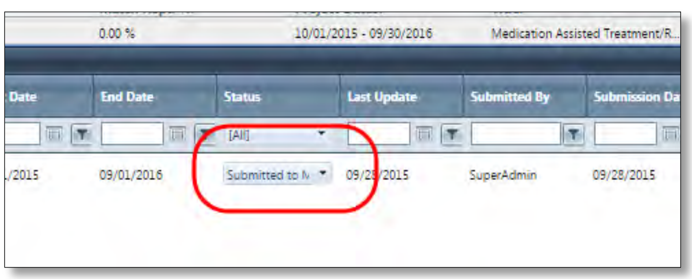
Note that the Status of the GAN is **New** and the GAN # will be **0** until it is executed or denied. You can edit or revise the GAN if you need to – refer to Section ***7.8.8 Modifying Grant Award Grant Adjustment Notices (GANs).***



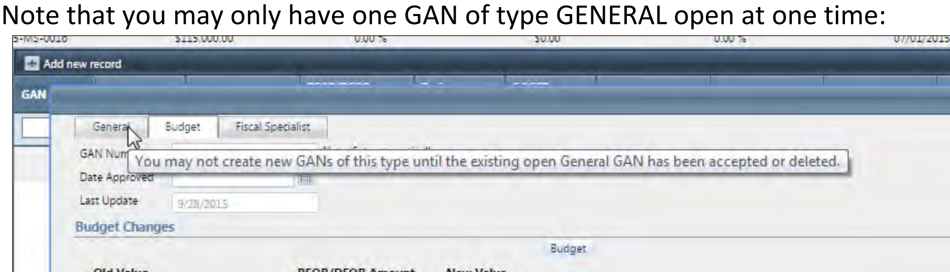
d. To submit the GAN for approval, click the status dropdown arrow in the Status column, and select Submit.



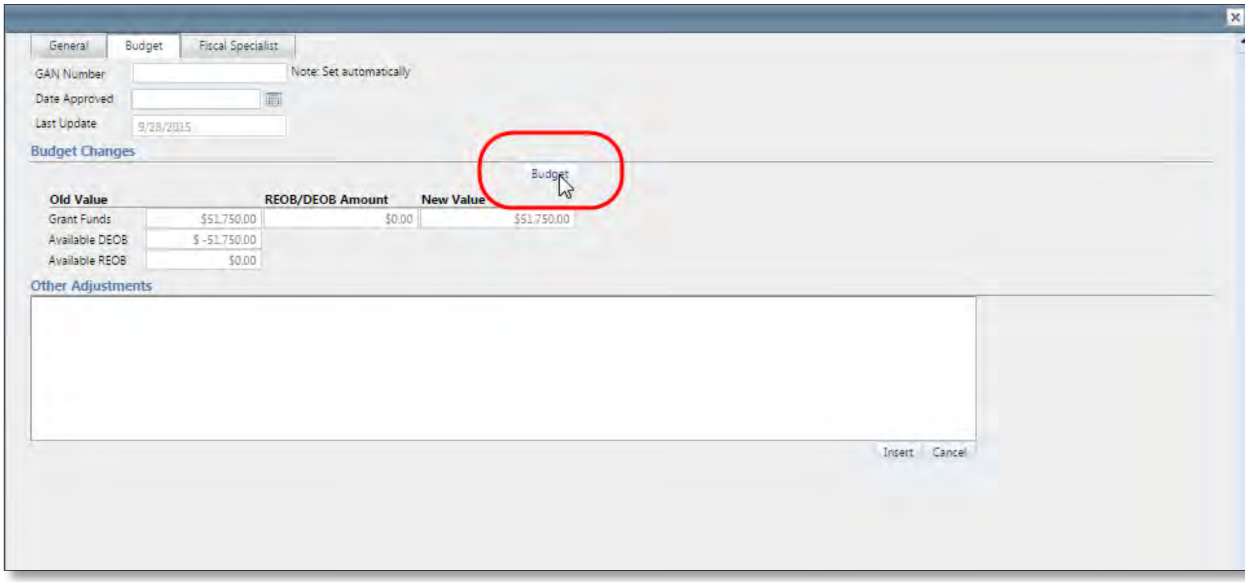
e. The status will then change to **Submitted to Monitor**.



f. Note that you may only have one GAN of type GENERAL open at one time:



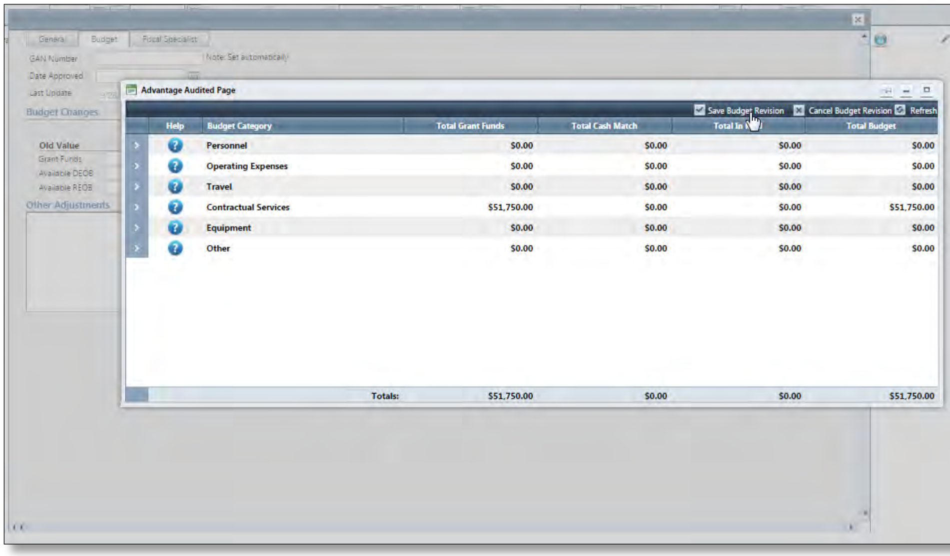
5. After clicking the Budget tab, the Budget GAN screen is displayed.



a. The budget changes fields are display-only and will be updated upon successful creation of a budget GAN:

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	Enter the date this GAN was approved.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this field.
Budget Changes	
Grant Funds Old Value	Displays the original total dollar amount allocated to this Grant Award.
Grant Funds REOB/DEOB Amount	Displays the dollar amount of the REOB/DEOB funding for this GAN.
Grant Funds New Value	Displays the new total dollar amount allocated to this Grant Award after the REOB/DEOB amount is entered.
Available DEOB	Displays the available DEOB dollar amount.
Available REOB	Displays the available REOB dollar amount.

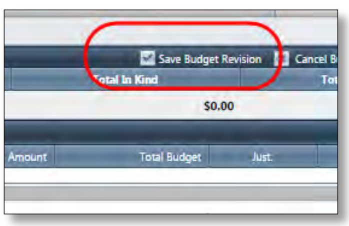
b. To create a budget GAN, click on the Budget button shown directly under the Budget Changes line in the above figure. Doing this will take you to the Budget Revision screen.



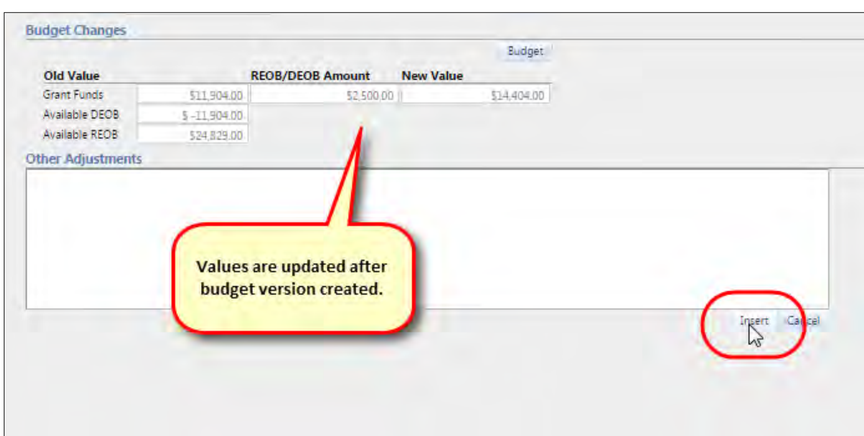
c. Entering a budget revision is described in detail in ***Section 7.3.3 – Add a Budget Revision*** in this User Manual. In addition, a help video is available online at https://youtu.be/ORqhp3aKRS8

HINT: Be sure to add a justification for every budget line item you create!

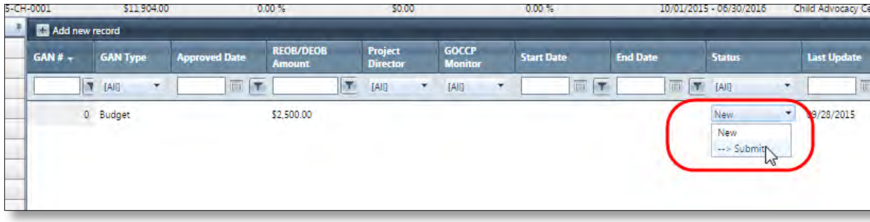
d. After creating your budget revision, click **Save Budget Revision**:



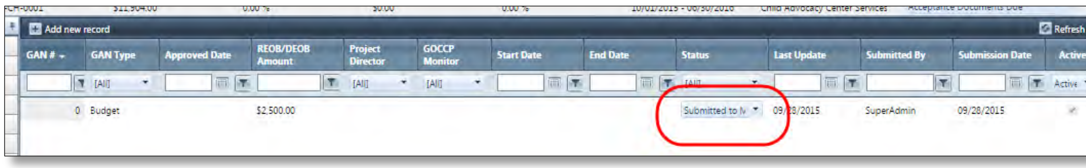
e. You are then returned to the Budget GAN screen. Click the **Insert** button to save your budget GAN:



f. To submit the GAN for approval, click the status dropdown arrow in the Status column, and select **Submit**.



g. The status will then change to **Submitted to Monitor**.



7.8.9 Modifying Grant Award Grant Adjustment Notices (GANs)

If there are multiple completed GANs against a single grant award, you will see the most recent one on top; ordered numerically.

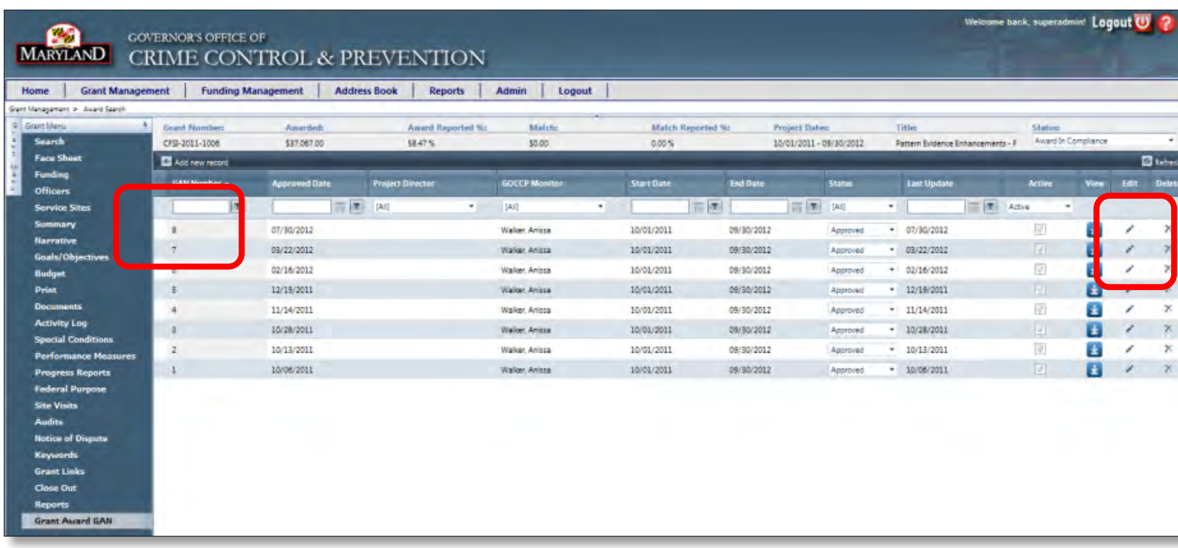
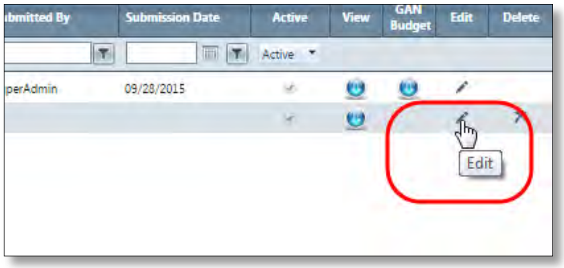


Figure 297 - Selecting a GAN to edit from List

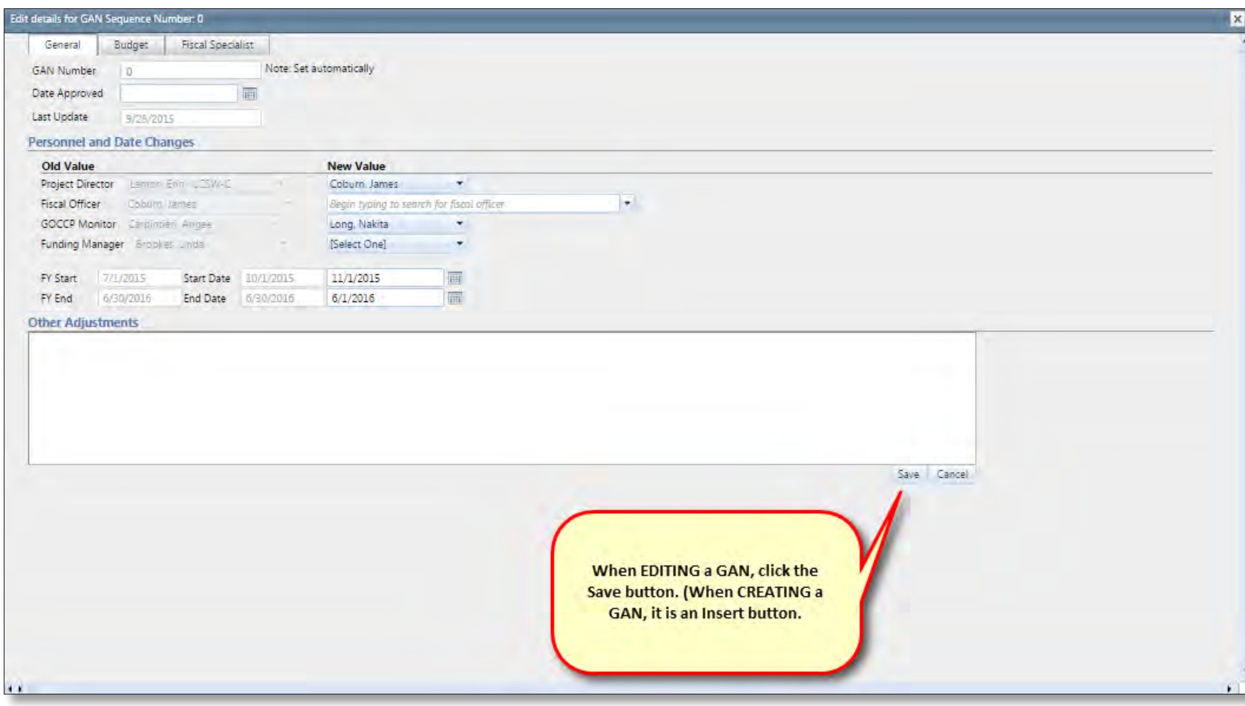
To Edit a GAN:

1. Locate the GAN you wish to edit, then click on the Pencil icon for that GAN:



2. The GAN edit screen appears. Whether the GAN is General or Budget, follow the instructions in the previous section to make your changes.

   The only difference when you are Editing a GAN versus Creating one is that when you are ready to save your changes, instead of clicking the **Insert** button when you are finished, there will be a **Save** button instead. Click that to save the changes to your GAN.

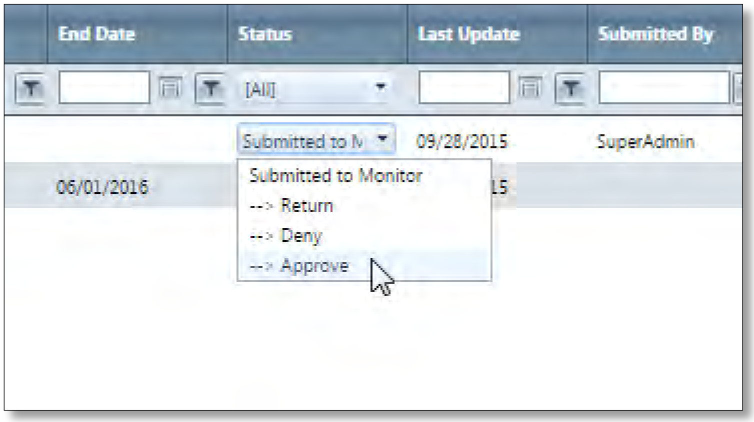


7.8.9.1 GAN Approval (Accessibility based on Permissions)

GAN's go through a chain of reviews prior to being executed or denied. Each role in the chain, for example Regional Manager and Funding Manager, has the opportunity to deny the GAN, return the GAN for revision, or approve the GAN. Once a role approves the GAN, it is submitted to the next role in the chain, until it reaches the Fiscal Specialist who Executes the GAN, which makes all changes to the Grant Award that were requested in the GAN, including changes to the Award Budget.

To approve a GAN:

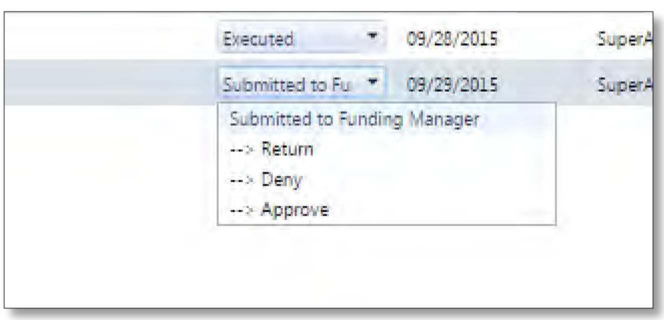
1. Locate the GAN, click the drop-down arrow under the Status column for that GAN:



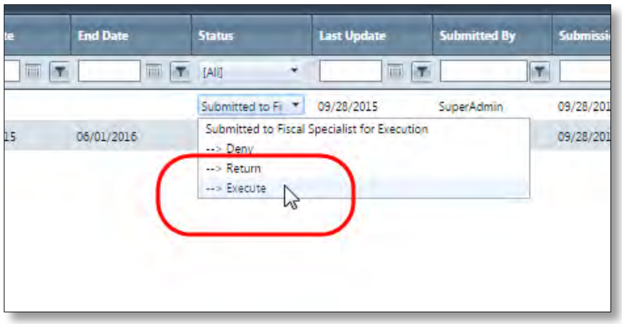
2. Select **Return** to return the GAN or revision, **Deny** to deny the GAN, and **Approve** to send it to the next role for review.

   NOTE: If your role is Regional Monitor, selecting Return will return the GAN for revision to the user who originated it. If you are in any role other than Regional Monitor, selecting Return returns the GAN to the prior role in the chain who approved the GAN before sending it to you.

3. For example, once a user submits a GAN, the status of the GAN changes to **Submitted to Monitor**. The Regional Monitor sees that status, and when she clicks the drop-down arrow in the Status column of that GAN, she can then Return, Deny, or Approve. If she approves, the status will change once again, to **Submitted to Funding Manager**.



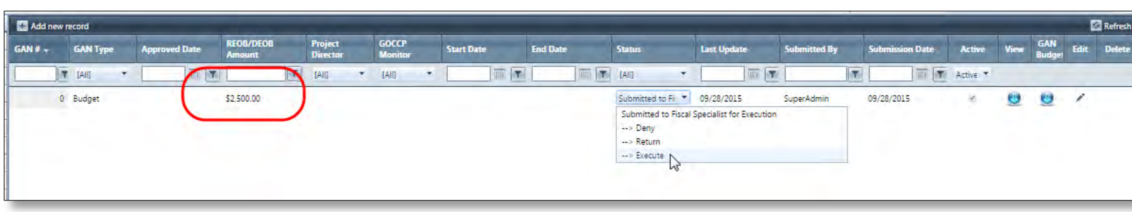
4. This will continue, until at the last stage of approval, the Fiscal Specialist has the opportunity to Return, Deny, or **Execute**. Where other roles would select **Approve**, the Fiscal Specialist selects **Execute** – all approvals have been made, and all changes requested in the GAN are incorporated into the Grant Award when the GAN is executed.



7.8.9.2 *Viewing GAN Budget Changes Immediately*

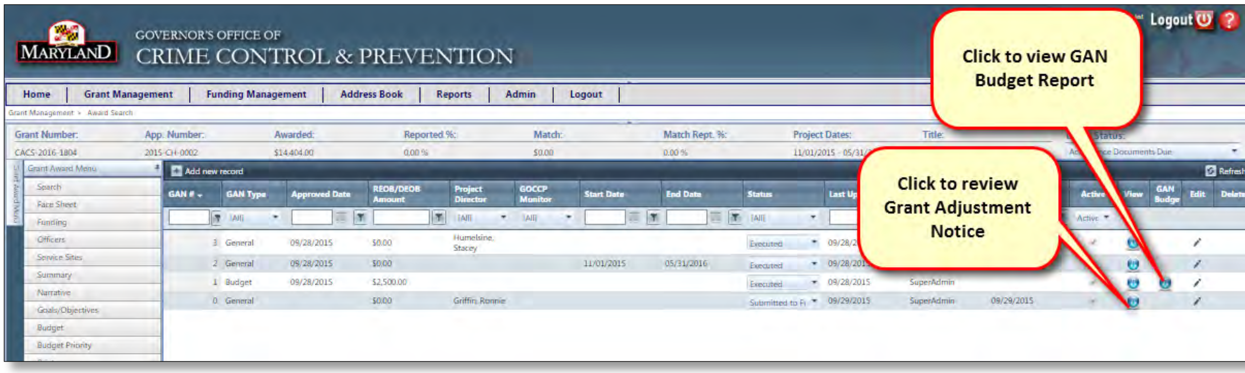
Changes to the Grant Award budget made by a GAN can be viewed immediately after the GAN has been approved and executed. For example, if this is the original award budget, containing nothing in the Equipment section:

then by executing a Budget GAN that specifies $2500 in Equipment:



we can immediately view the Budget (click Budget in the Grant Award Menu) and see the immediate impact of the GAN:

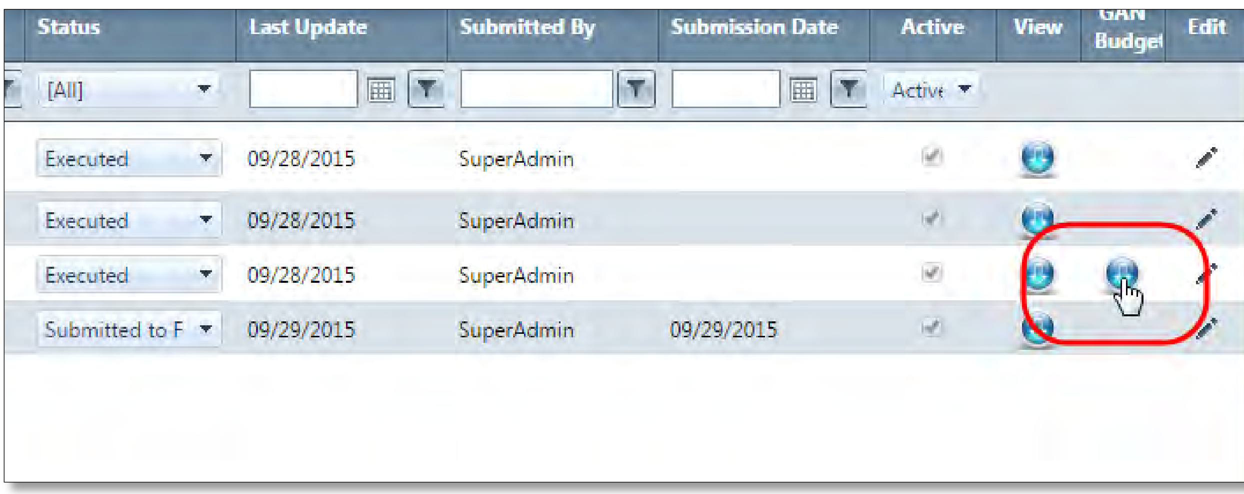
Another way of immediately viewing GAN-proposed budget changes to an award is to run the GAN Budget report. Similarly, you can view Grant Adjustment Notices for both General and Budget GANs (refer to **Section 7.8.8.2.2 – Grant Adjustment Notices**).



7.8.9.2.1 GAN Budget Report

To View the GAN Budget Report

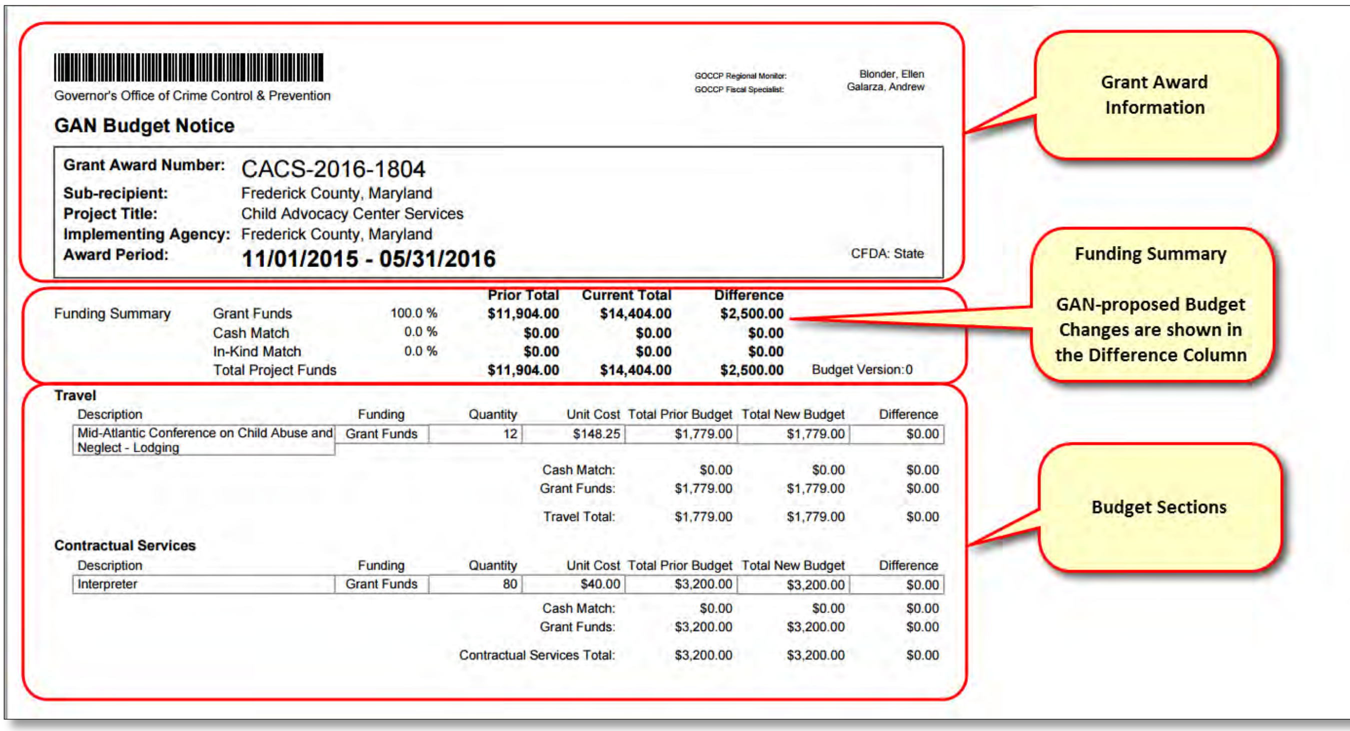
1. Locate the Budget GAN in the list of GAN's
2. Click on the globe icon in the GAN Budget column of that GAN



3. The report will print to a PDF file and open in another tab of your browser, unless you save the file to your hard disk instead. Following is an example GAN Budget Report.

NOTE: GAN Budget Reports can span several pages. On each page, the top half of the page shows grant award information, followed by a funding summary. After that, each budget category is shown. Using the example from the previous section, we added a $2500 entry for laptop computer in the Equipment section of the budget. This will be shown on the report:

GAN Budget Report – Page 1



Governor's Office of Crime Control & Prevention

GOCCP Regional Monitor: Blonder, Ellen
GOCCP Fiscal Specialist: Galarza, Andrew

GAN Budget Notice

Grant Award Number: CACS-2016-1804
Sub-recipient: Frederick County, Maryland
Project Title: Child Advocacy Center Services
Implementing Agency: Frederick County, Maryland
Award Period: **11/01/2015 - 05/31/2016**
CFDA: State

Funding Summary			Prior Total	Current Total	Difference
	Grant Funds	100.0 %	$11,904.00	$14,404.00	$2,500.00
	Cash Match	0.0 %	$0.00	$0.00	$0.00
	In-Kind Match	0.0 %	$0.00	$0.00	$0.00
	Total Project Funds		$11,904.00	$14,404.00	$2,500.00

Budget Version:0

Travel

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Mid-Atlantic Conference on Child Abuse and Neglect - Lodging	Grant Funds	12	$148.25	$1,779.00	$1,779.00	$0.00
			Cash Match:	$0.00	$0.00	$0.00
			Grant Funds:	$1,779.00	$1,779.00	$0.00
			Travel Total:	$1,779.00	$1,779.00	$0.00

Contractual Services

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Interpreter	Grant Funds	80	$40.00	$3,200.00	$3,200.00	$0.00
			Cash Match:	$0.00	$0.00	$0.00
			Grant Funds:	$3,200.00	$3,200.00	$0.00
			Contractual Services Total:	$3,200.00	$3,200.00	$0.00

GAN Budget Report Page 2

Governor's Office of Crime Control & Prevention

GOCCP Regional Monitor: Blonder, Ellen
GOCCP Fiscal Specialist: Galarza, Andrew

GAN Budget Notice

Grant Award Number: CACS-2016-1
Sub-recipient: Frederick County, M
Project Title: Child Advocacy Ce
Implementing Agency: Frederick County, M
Award Period: **11/01/2015**

CFDA: State

Line Item added in GAN

Funding Summary				tal	Difference
	Grant Funds			.00	$2,500.00
	Cash Match	0.0 %	$0.00	$0.00	$0.00
	In-Kind Match	0.0 %	$0.00	$0.00	$0.00
	Total Project Funds		$11,904.00	$14,404.00	$2,500.00

Budget Version: 0

Equipment

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Laptop Computer	Grant Funds	1	$2,500.00	$0.00	$2,500.00	$2,500.00
			Cash Match:	$0.00	$0.00	$0.00
			Grant Funds:	$0.00	$2,500.00	$2,500.00
			Equipment Total:	$0.00	$2,500.00	$2,500.00

Other

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Maryland Children's Alliance - Membership	Grant Funds	1	$300.00	$300.00	$300.00	$0.00
Mid Atlantic Conference on Child Abuse and Neglect - Registration	Grant Funds	11	$375.00	$4,125.00	$4,125.00	$0.00
National Children's Alliance - Membership	Grant Funds	1	$500.00	$500.00	$500.00	$0.00
NCATrak User Fee	Grant Funds	1	$2,000.00	$2,000.00	$2,000.00	$0.00
			Cash Match:	$0.00	$0.00	$0.00
			Grant Funds:	$6,925.00	$6,925.00	$0.00
			Other Total:	$6,925.00	$6,925.00	$0.00

GAN Budget Report Page 3

Governor's Office of Crime Control & Prevention

GOCCP Regional Monitor: Blonder, Ellen
GOCCP Fiscal Specialist: Galarza, Andrew

GAN Budget Notice

Grant Award Number: CACS-2016-1804
Sub-recipient: Frederick County, Maryland
Project Title: Child Advocacy Center Services
Implementing Agency: Frederick County, Maryland
Award Period: **11/01/2015 - 05/31/2016**

CFDA: State

Funding Summary			Prior Total	Current Total	Difference
	Grant Funds	100.0 %	$11,904.00	$14,404.00	$2,500.00
	Cash Match	0.0 %	$0.00	$0.00	$0.00
	In-Kind Match	0.0 %	$0.00	$0.00	$0.00
	Total Project Funds		$11,904.00	$14,404.00	$2,500.00

Budget Version: 0

Approved: ______________________________
GOCCP Authorized Representative

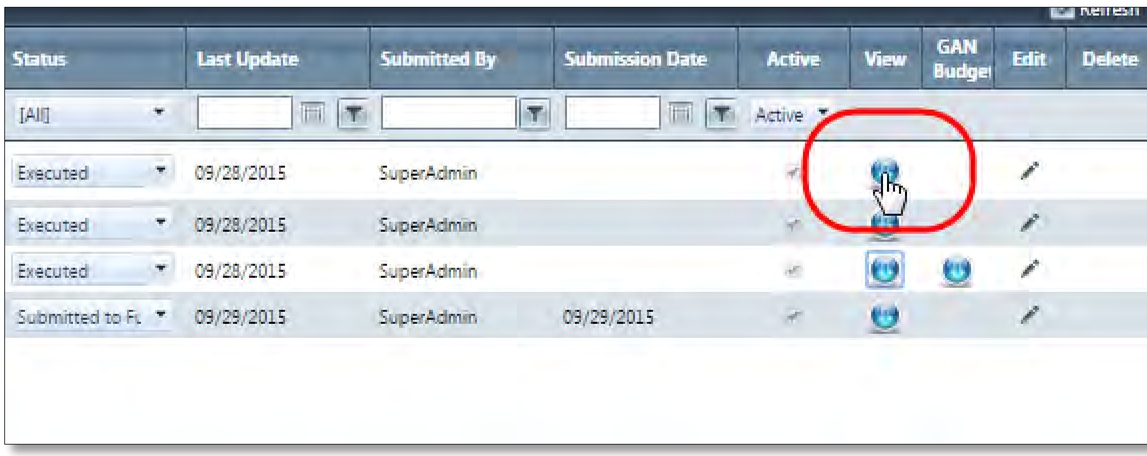
Effective Date: 11/1/2015

7.8.9.2.2 Grant Adjustment Notices

Grant Adjustment Notices are small reports that summarize the changes to the grant award that will occur when a GAN is approved and executed.

To View the GAN Budget Report

1. Locate the GAN in the list of GAN's for which you want to view the report
2. Click on the globe icon in the **View** column of that GAN



3. The report will print to a PDF file and open in another tab of your browser, unless you save the file to your hard disk instead. Following are two **example Grant Adjustment Notices**.

Grant Adjustment Notice (for a Budget GAN) Page 1

Governor's Office of Crime Control and Prevention

CACS-2016-1804
Funding Year
CFDA: State

GRANT ADJUSTMENT NOTICE

Adjustment No: 1

TITLE OF PROGRAM:	**Child Advocacy Center Services**
FUNDING AGENCY:	**Frederick County, Maryland**
FUNDING SUBAGENCY:	**Frederick County, Maryland**
FUNDING PERIOD:	**11/01/2015 To 05/31/2016**

The GAN-proposed budget amount is shown here.

SECTION I. DEOBLIGATIONS & REOBLIGATIONS:

Previous Amount of Grant Award	$11,904.00
Reobligation / Deobligation Amount	$2,500.00
Adjusted Amount of Award	$14,404.00

Travel

Description	Funding	Quantity	Unit Cost	Total Budget
Mid-Atlantic Conference on Child Abuse and Neglect - Lodging	Grant Funds	12	$148.25	$1,779.00
			Travel Total:	$1,779.00

Contractual Services

Description	Funding	Quantity	Unit Cost	Total Budget
Interpreter	Grant Funds	80	$40.00	$3,200.00
			Contractual Services Total:	$3,200.00

Equipment

Description	Funding	Quantity	Unit Cost	Total Budget
Laptop Computer	Grant Funds	1	$2,500.00	$2,500.00
			Equipment Total:	$2,500.00

Other

Description	Funding	Quantity	Unit Cost	Total Budget
Maryland Children's Alliance - Membership	Grant Funds	1	$300.00	$300.00
Mid Atlantic Conference on Child Abuse and Neglect - Registration	Grant Funds	11	$375.00	$4,125.00
National Children's Alliance - Membership	Grant Funds	1	$500.00	$500.00
NCATrak User Fee	Grant Funds	1	$2,000.00	$2,000.00
			Other Total:	$6,925.00

SECTION II. CHANGES:

No Changes to Project Director

No Changes to Fiscal Officer

Grant Adjustment Notice (for a Budget GAN) Page 2

No Changes to GOCCP Grant Monitor

No Changes to Fiscal Specialist

No Changes to Funding Manager

No Changes to Start Date

No Changes to End Date

SECTION III. OTHER ADJUSTMENTS & INFORMATION:

Processed by: ______________________

Approved: ______________________

Authorized Official Governor's Office of Crime Control and Prevention

Date: **9/28/2015**

Grant Adjustment Notice (for a General GAN) Page 1 of 1

Governor's Office of Crime Control and Prevention

CACS-2016-1804
Funding Year
CFDA: State

GRANT ADJUSTMENT NOTICE

Adjustment No: 3

TITLE OF PROGRAM:	**Child Advocacy Center Services**
FUNDING AGENCY:	**Frederick County, Maryland**
FUNDING SUBAGENCY:	**Frederick County, Maryland**
FUNDING PERIOD:	**11/01/2015 To 05/31/2016**

No Budget Changes

SECTION I. DEOBLIGATIONS & REOBLIGATIONS:

Previous Amount of Grant Award	$14,404.00
Reobligation / Deobligation Amount	$0.00
Adjusted Amount of Award	$14,404.00

SECTION II. CHANGES:

Change Project Director From: Davis, Lynn To: Humelsine, Stacey

Change Fiscal Officer From: Davis, Lynn To: Marshall, Abigail

No Changes to GOCCP Grant Monitor

No Changes to Fiscal Specialist

No Changes to Funding Manager

No Changes to Start Date

No Changes to End Date

Personnel changes requested by GAN

SECTION III. OTHER ADJUSTMENTS & INFORMATION:

Processed by: ____________________

Approved: ____________________

Authorized Official Governor's Office of Crime Control and Prevention

Date: 9/28/2015

7.8.10 Review Grant Award Reports

Locate the award you wish to review reports for via Grant Management -> Award Search.

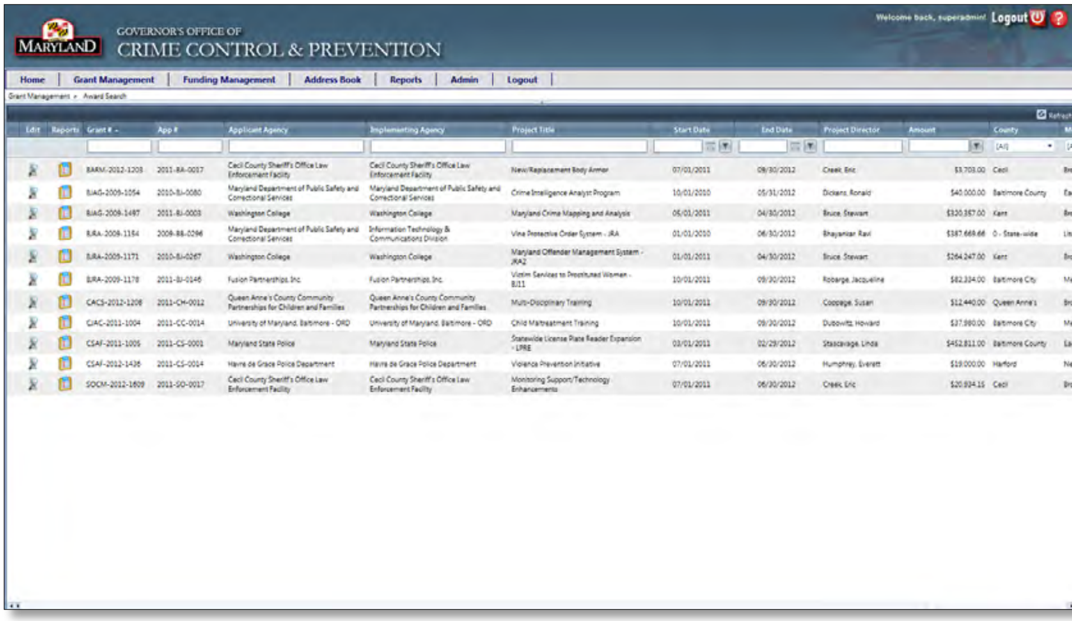


Figure 298 - Locate Grant Award in Award Search screen

1. Click on the magnifying glass icon in the Edit column of the Award record.
2. This brings up the Award detail screen with the detailed Grant Award Menu and defaults to the Face Sheet.

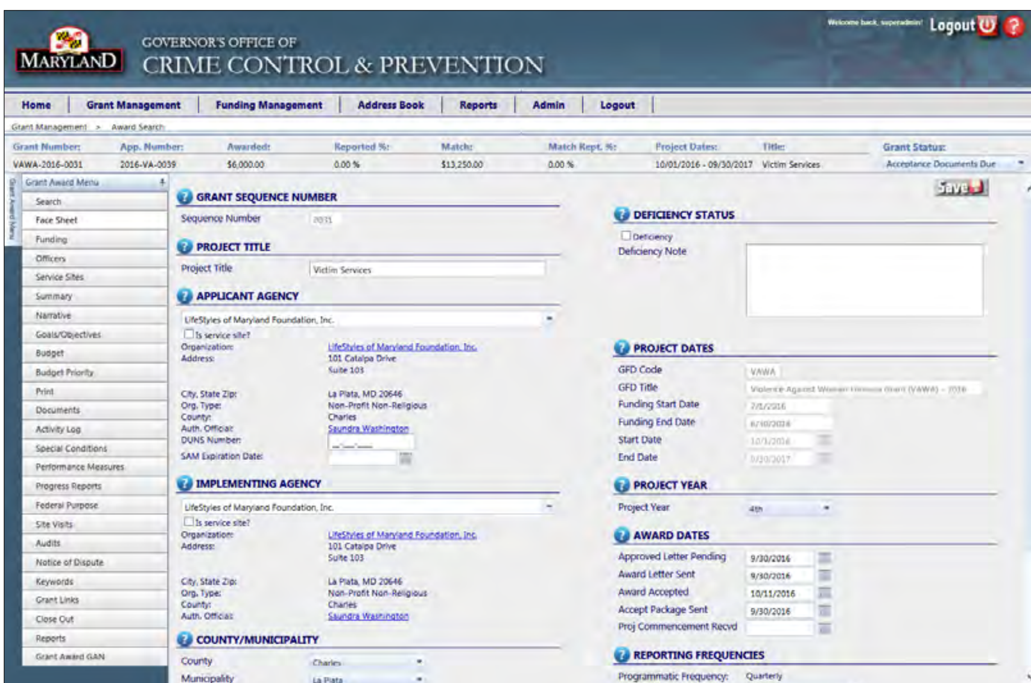


Figure 299 – View Award Detail Screen (Grant Award Menu & Face Sheet by default)

7.8.10.1 How to Require Monthly Financial Reporting

Internal users have the option to require a subrecipient to submit financial reports to GOCCP on a monthly basis. This is accomplished from the Face Sheet of a Grant Award as follows:

1. Use the Award Search as described above to locate and edit a grant award. The **Face Sheet** is displayed by default.
2. Scroll down on the page until you can see the **Reporting Frequencies** section.
3. Use the pull-down menu to select **Monthly** as the **Financial Frequency**.

Figure 300 – Select Monthly as Financial Reporting Frequency

4. Once you've selected **Monthly** as the Financial Reporting Frequency, a **Must Report** check box appears directly below the **Financial Frequency** pull-down menu. By clicking the check box to place a checkmark in it, you will be requiring the subrecipient of this award to submit financial reports on a monthly basis.

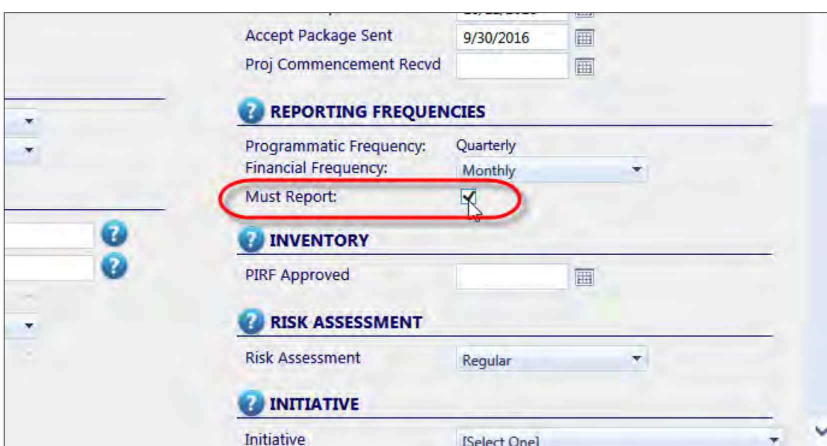


Figure 301 – "Must Report" Checkbox appears on Face Sheet

5. Click on the **Save** button to save your **Reporting Frequencies** and **Must Report** changes.

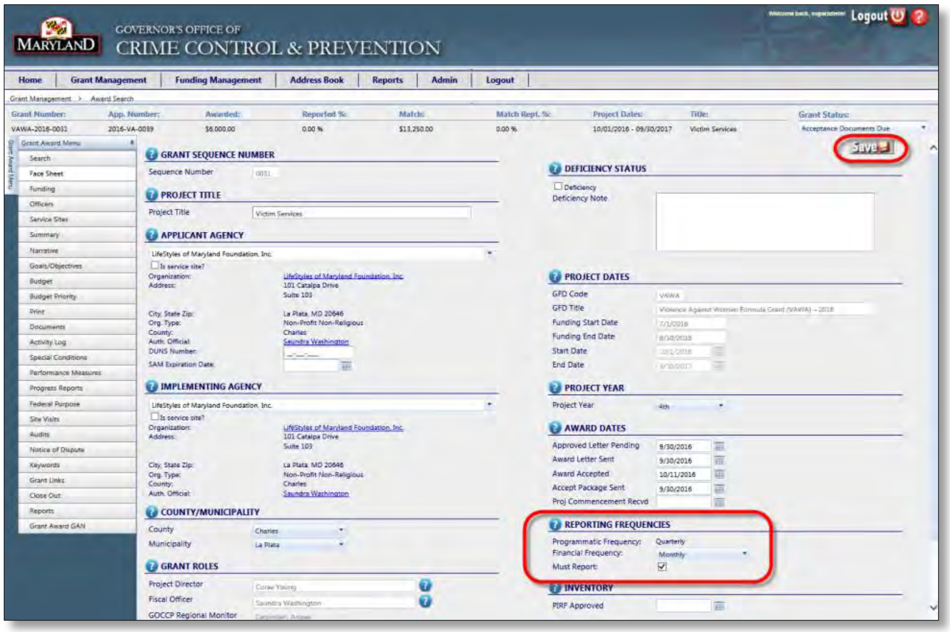


Figure 302 – Save Changes

"Must Report" Notes:

- The Must Report checkbox is shown to internal users only, and is shown only when the Financial Reporting Frequency is set to Monthly.
- Grant Managers and Funding Managers can edit the Must Report checkbox when displayed.
- External Users are disabled from making changes to the Financial Reporting Period when creating or editing a Grant Application.

7.8.10.1.1 Generate Grant Modification Request Form

1. Within a grant award, navigate to the Reports, Financial Reports area, and click the magnifying glass icon to view an individual financial report.

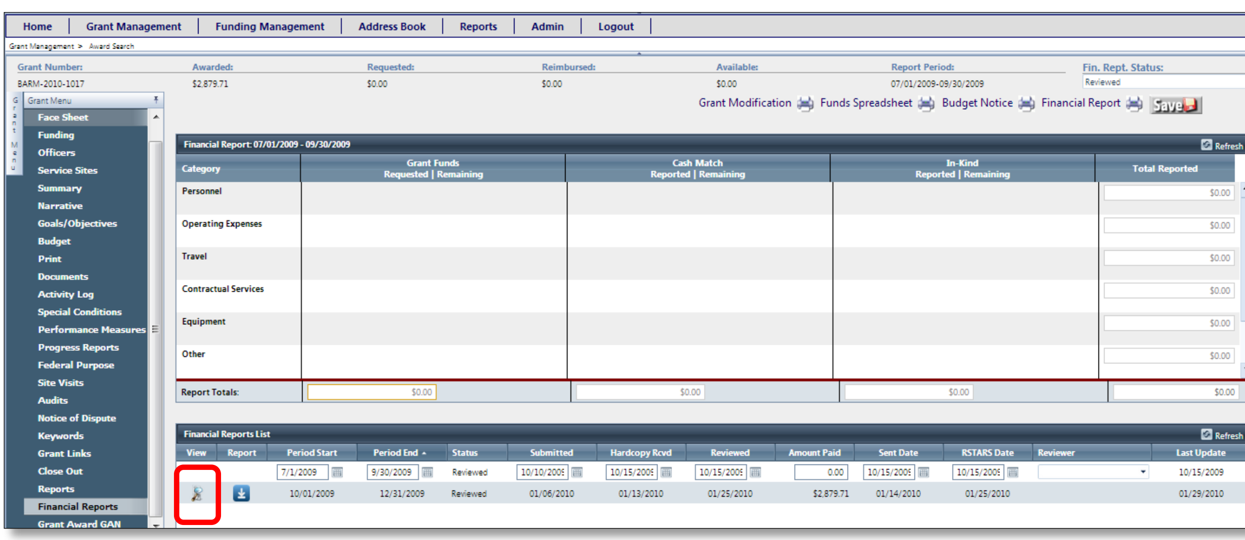


Figure 303 - Select an individual financial report to view

2. Within the financial report, click the printer icon next to the Grant Modification link at the top right of the page to generate a Grant Modification Request.
3. Download the file from your web browser; then save or print from Adobe Acrobat.

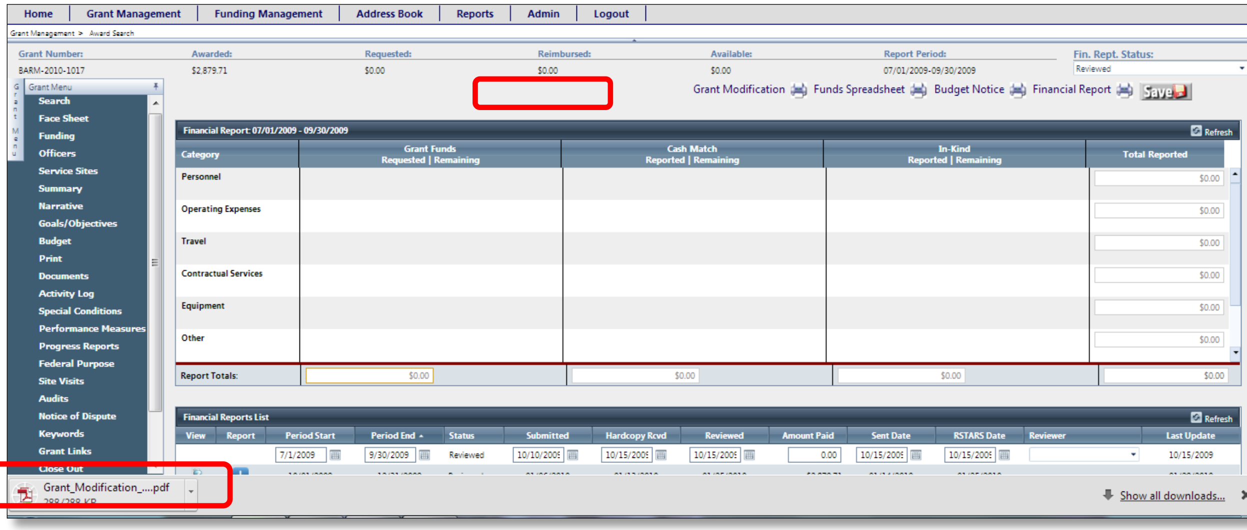


Figure 304 - Generate Grant Modification Form

7.8.10.1.2 Generate Grant Budget Notice

1. Within a grant award, navigate to the Reports, Financial Reports area, and click the magnifying glass icon to view an individual financial report.

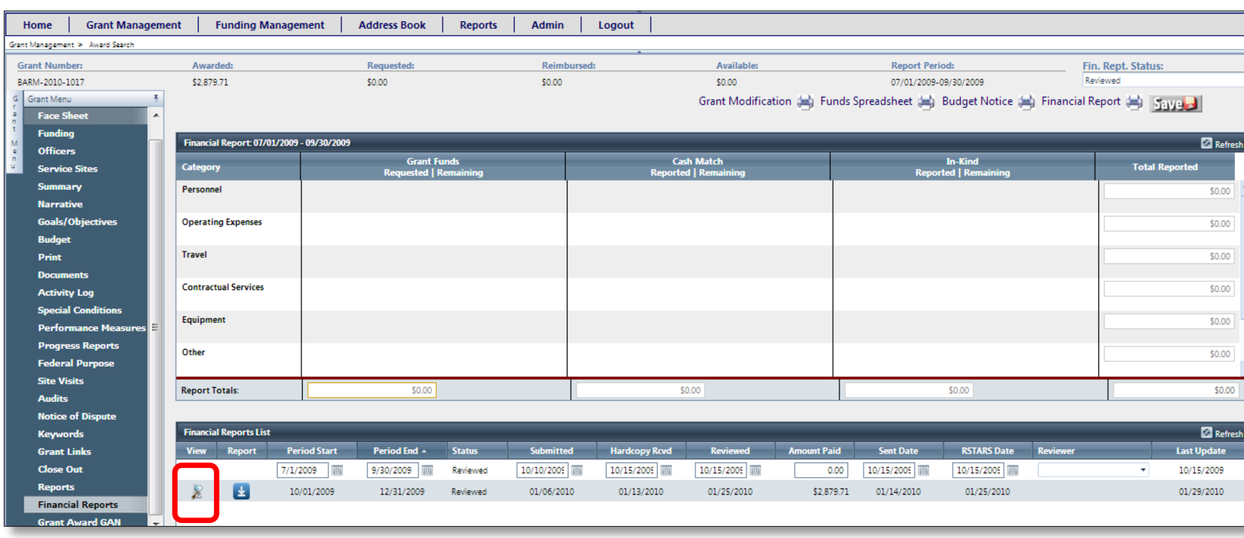


Figure 305 - Select an individual financial report to view

2. Within the financial report, click the printer icon next to the Budget Notice link at the top right of the page to generate a Grant Budget Notice.
3. Download the file from your web browser; then save or print from Adobe Acrobat.

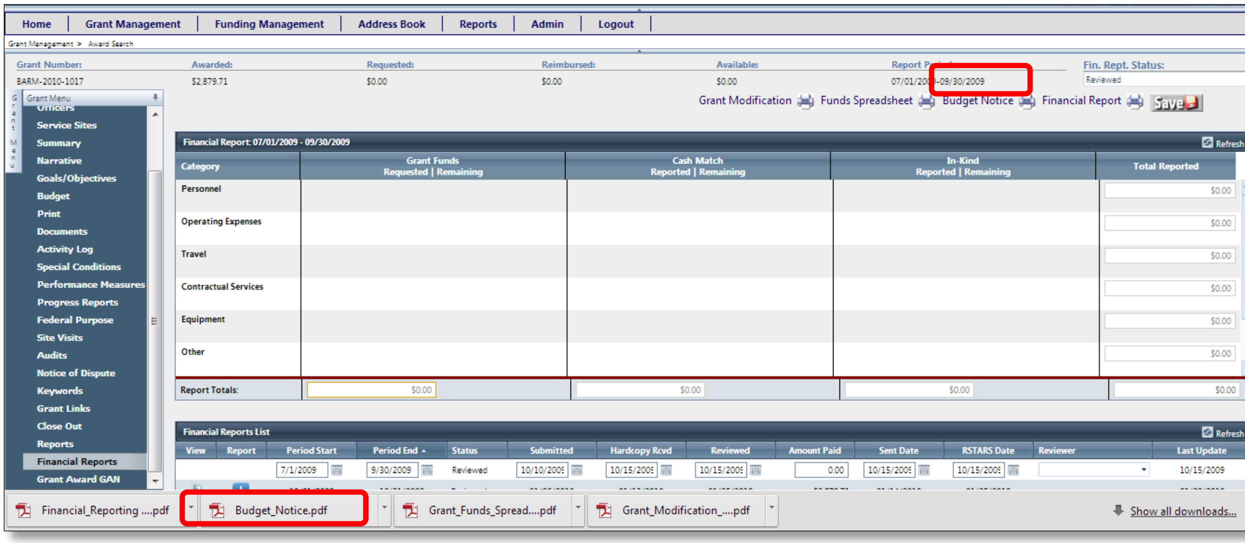


Figure 306 - Generate Budget Notice

7.8.10.1.3 Generate Funds Spreadsheet

1. Within a grant award, navigate to the Reports, Financial Reports area, and click the magnifying glass icon to view an individual financial report.

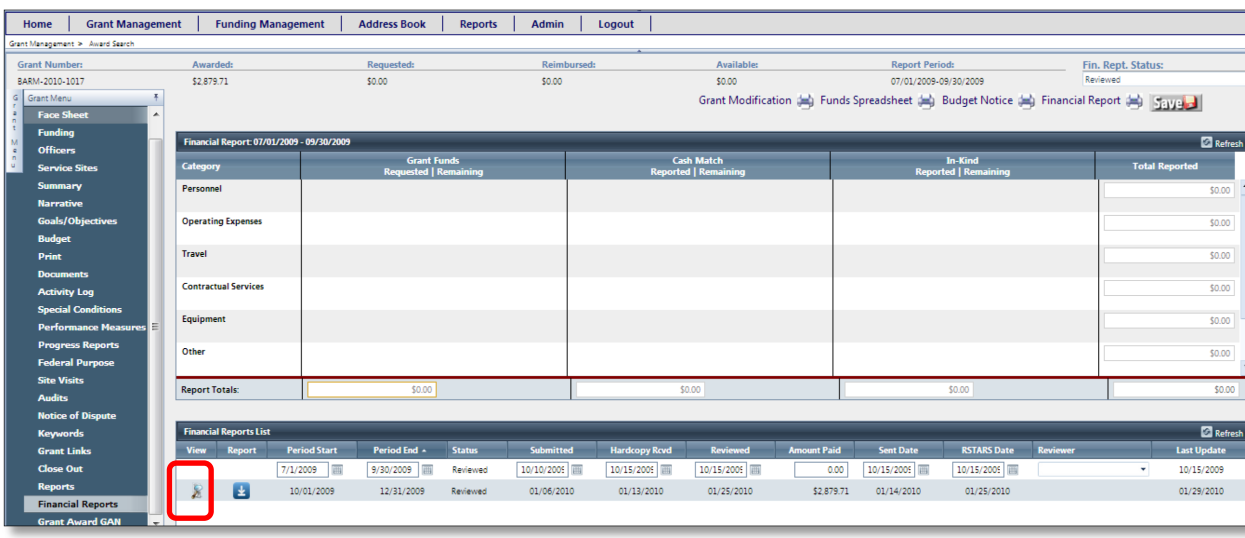


Figure 307 - Select an individual financial report to view

2. Within the financial report, click the printer icon next to the Funds Spreadsheet link at the top right of the page to generate a Grant Funds Spreadsheet.
3. Download the file from your web browser; then save or print from Adobe Acrobat.

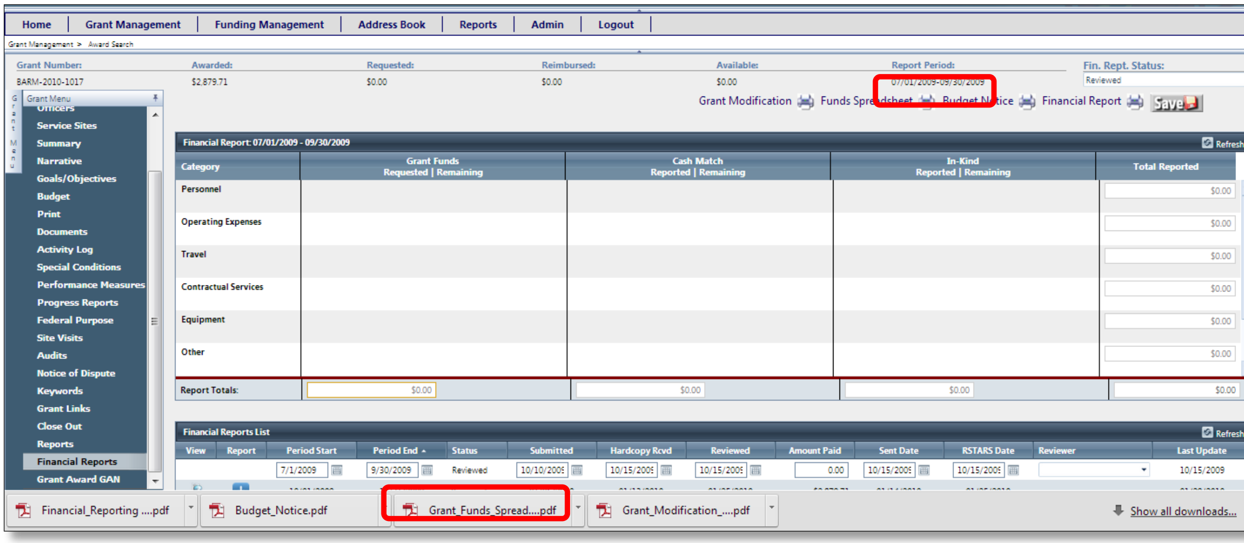


Figure 308 - Generate Grant Funds Spreadsheet

7.8.10.2 Review Progress Reports

1. Click Reports in the Grant Menu to return the display screen to the report type listing.
2. Click the blue-highlighted Progress Reports bar to expand the list of reports filed for this category.

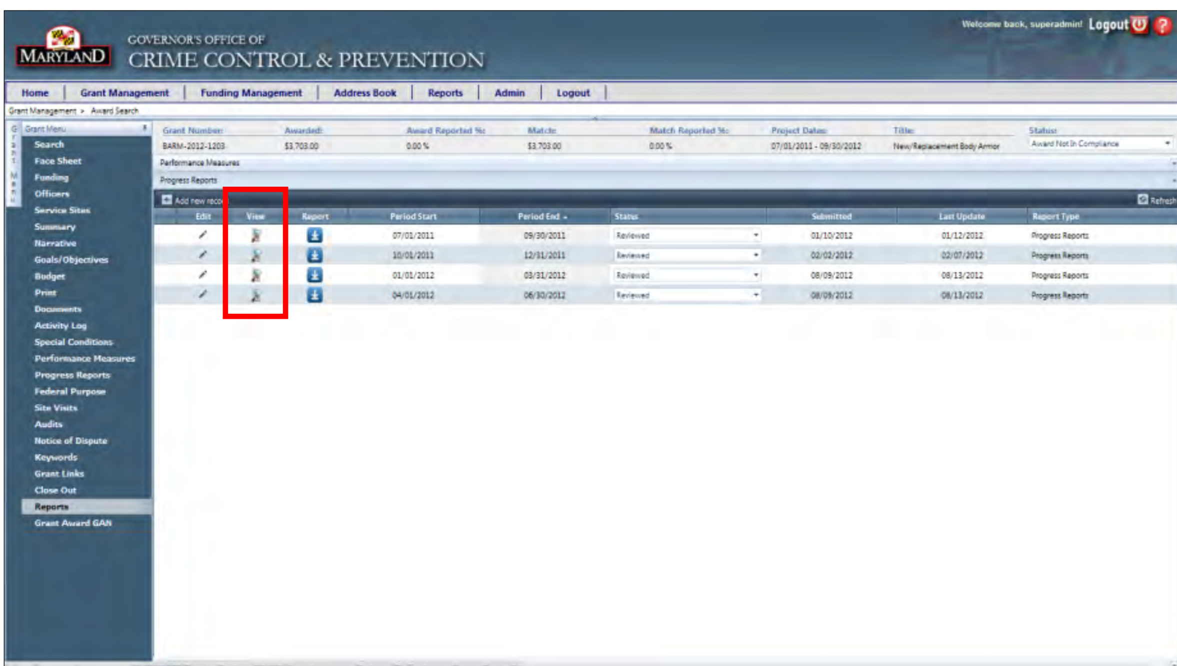


Figure 309 - Select Progress Reports

3. One can insert a new progress report; the period start and end dates are prepopulated but can be overwritten; all other fields are manually entered and should be entered before submitting for review. Last Update field is always system generated based on user actions saved.

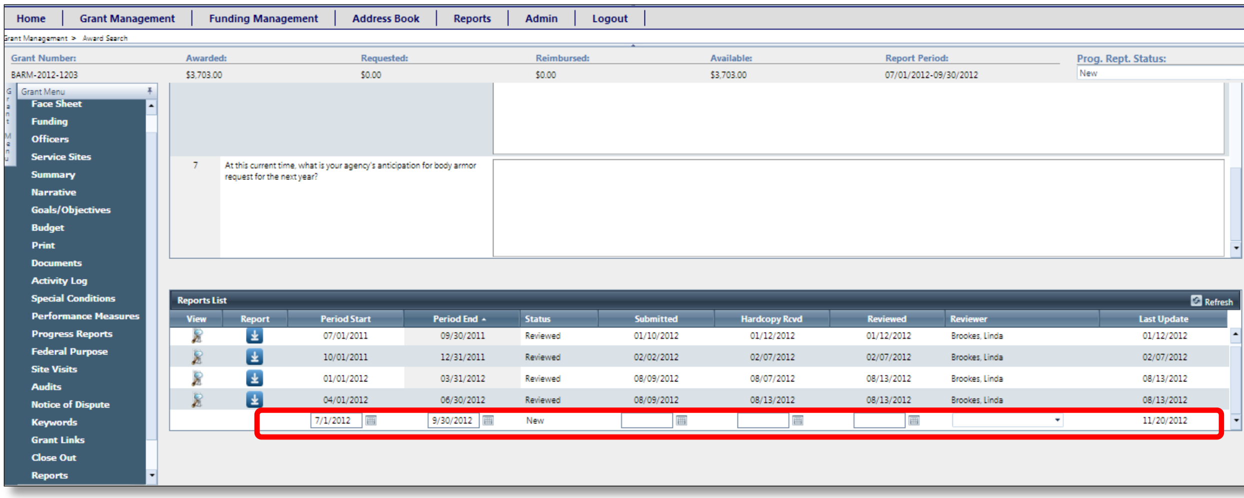


Figure 310 - View progress report details, edit dates, and see last update column

4. Click on the magnifying glass icon in the View column of the Progress Report you wish to review.

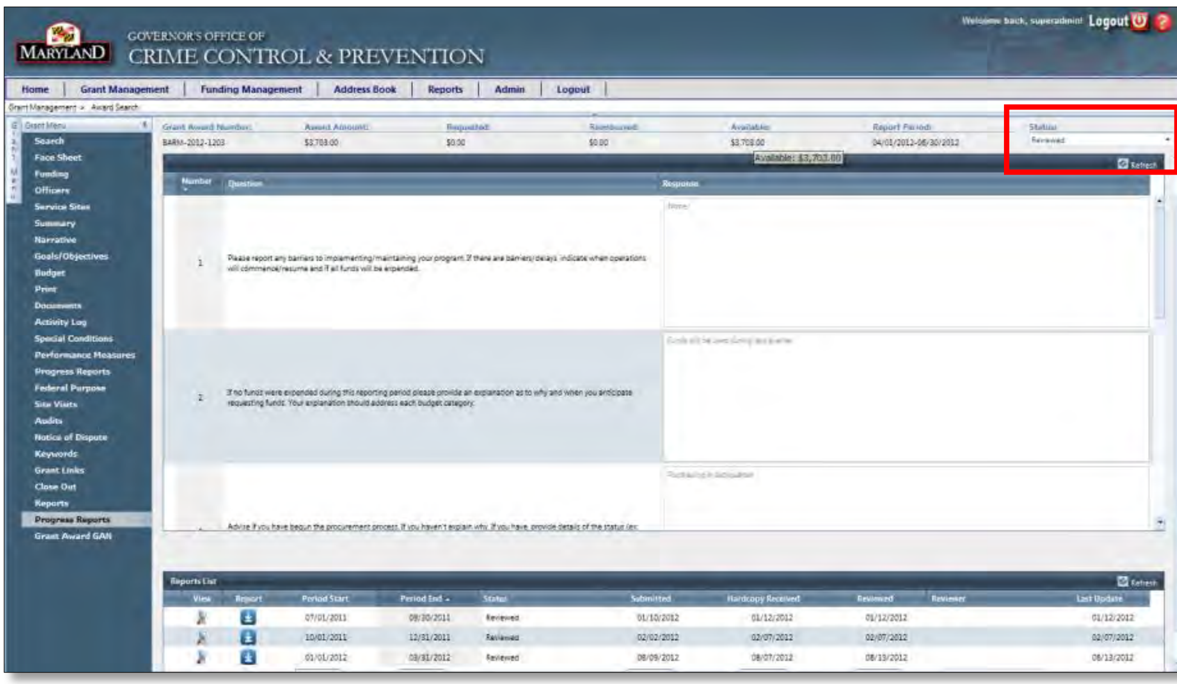


Figure 311 - Review Progress Report

5. When you've reviewed the report and it is satisfactory, click on the Status dropdown menu and select "Reviewed".

6. If the review of the report is not satisfactory, click on the Status dropdown menu and select "Return for Revision" and repeat the process until satisfactory.

7.8.10.3 Review Performance Measures

1. Click Reports in the Grant Menu to return the display screen to the report type listing.

2. Click the blue-highlighted Performance Measures bar to expand the list of reports filed for this category.

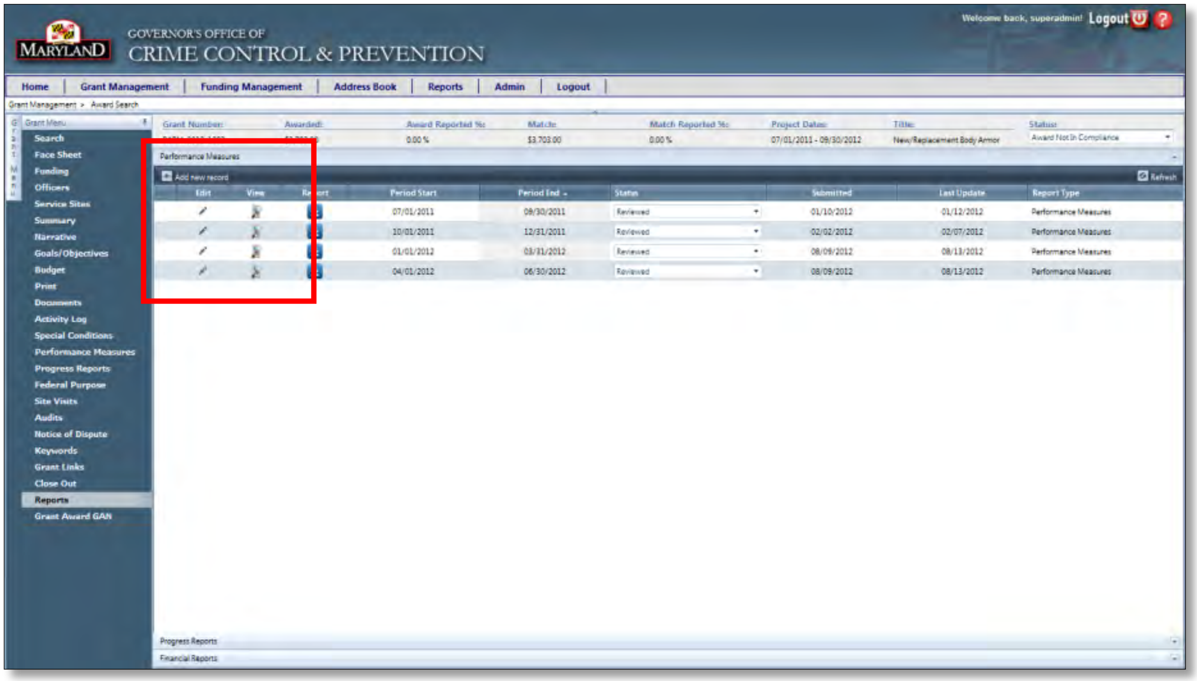


Figure 312 - Select Performance Measures

3. Click on the magnifying glass icon in the View column of the Progress Report you wish to review.

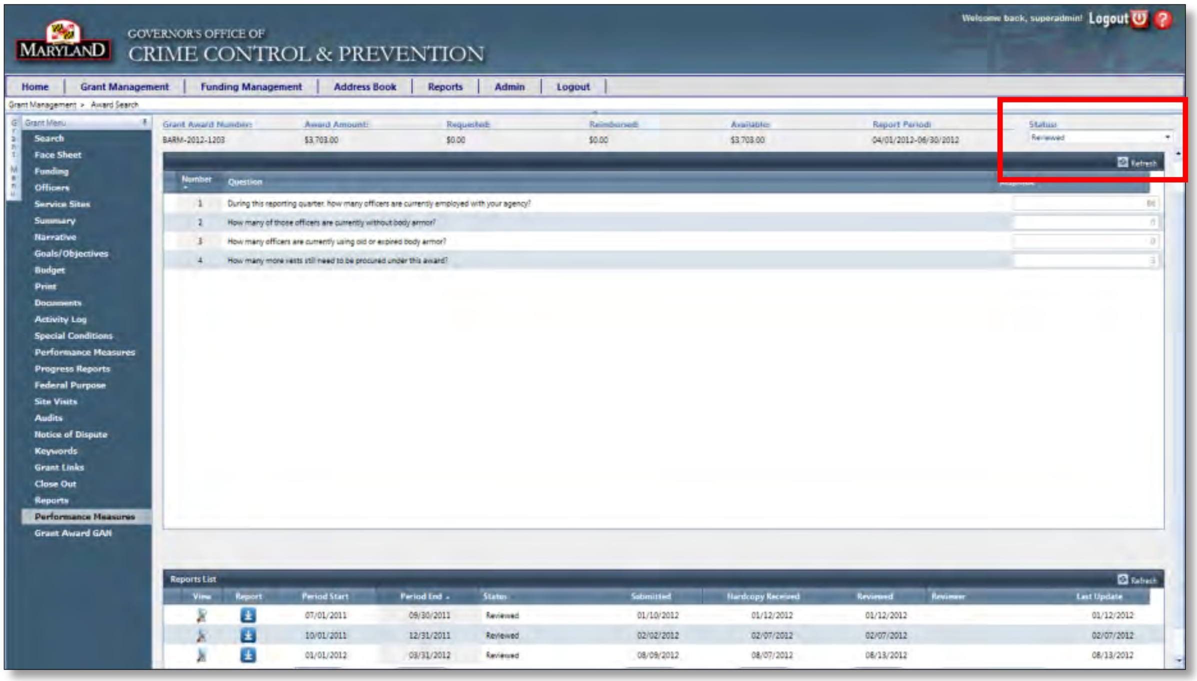


Figure 313 - Review Performance Measures

4. One can insert a new performance measure; the period start and end dates are prepopulated but can be overwritten; all other fields are manually entered and should be entered before submitting for review. Last Update field is always system generated based on user actions saved.

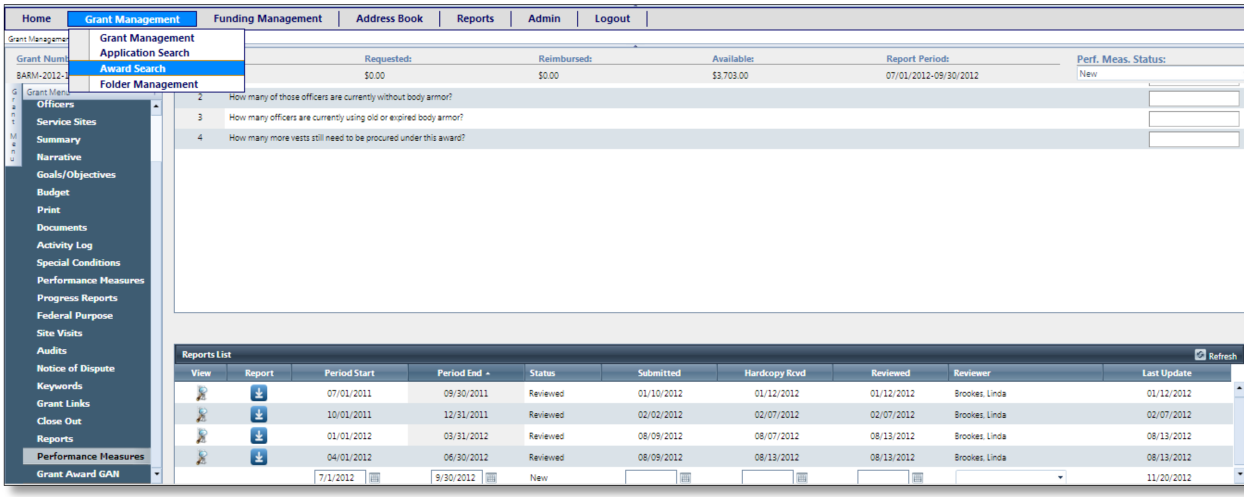


Figure 314 -View performance measure details, edit dates, and see last update column

5. When you've reviewed the report and it is satisfactory, click on the Status dropdown menu and select "Reviewed".

6. If the review of the report is not satisfactory, click on the Status dropdown menu and select "Return for Revision" and repeat the process until satisfactory.

7.8.11 Create a Grant Award Grant Adjustment Notice (GAN) (Accessibility based on Permissions)

Manage Grant Adjustment Notices (GANs) in this screen. Grant modification requests that have been submitted, reviewed and approved will be entered into the system and managed using this interface.

To add a new GAN:

1. Click on Add New Record
2. Enter the required data in the date approved and all other fields that apply: ReOb/DeOb funds, personnel changes FY start or end date changes, or other notes. Click Insert to add, or cancel to not add.

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	Enter the date this GAN was approved.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this field.
Budget Changes	
Funding Year	
REOB/DEOB Amount	Enter the dollar amount of the REOB/DEOB funding for this GAN.
Old Value	Display only: Displays the original total dollar amount allocated to this Grant Award.

New Value	Display only: Displays the new total dollar amount allocated to this Grant Award after the REOB/DEOB amount is entered.
Available DEOB	Display only: Displays the available DEOB dollar amount.
Available REOB	Display only: Displays the available REOB dollar amount.
Personnel and Date Changes	
Project Director	
Old Value	Display only: Displays the person currently assigned to the Project Director role for this Grant Award.
New Value	Select the new Project Director from the drop-down list.
GOCCP Monitor	
Old Value	Display only: Displays the GOCCP staff member currently assigned to the Regional Monitor role for this Grant Award.
New Value	Select the new GOCCP Regional Monitor from the drop-down list.
Start Date	
Old Value	Display only: Displays the original Start Date of the Grant Award.
New Value	Enter the new Start Date for this Grant Award.
End Date	
Old Value	Display only: Displays the original End Date of the Grant Award.
New Value	Enter the new End Date for this Grant Award.
Other Adjustments	This is a free-form text field. Enter any other miscellaneous adjustments or amendments to the Grant Award based on this GAN.
Insert/Cancel	After entering the required information for this GAN, click on the **Insert** button to save the record or click the **Cancel** button to cancel adding this GAN. If you hit the Cancel button, your changes will be lost.

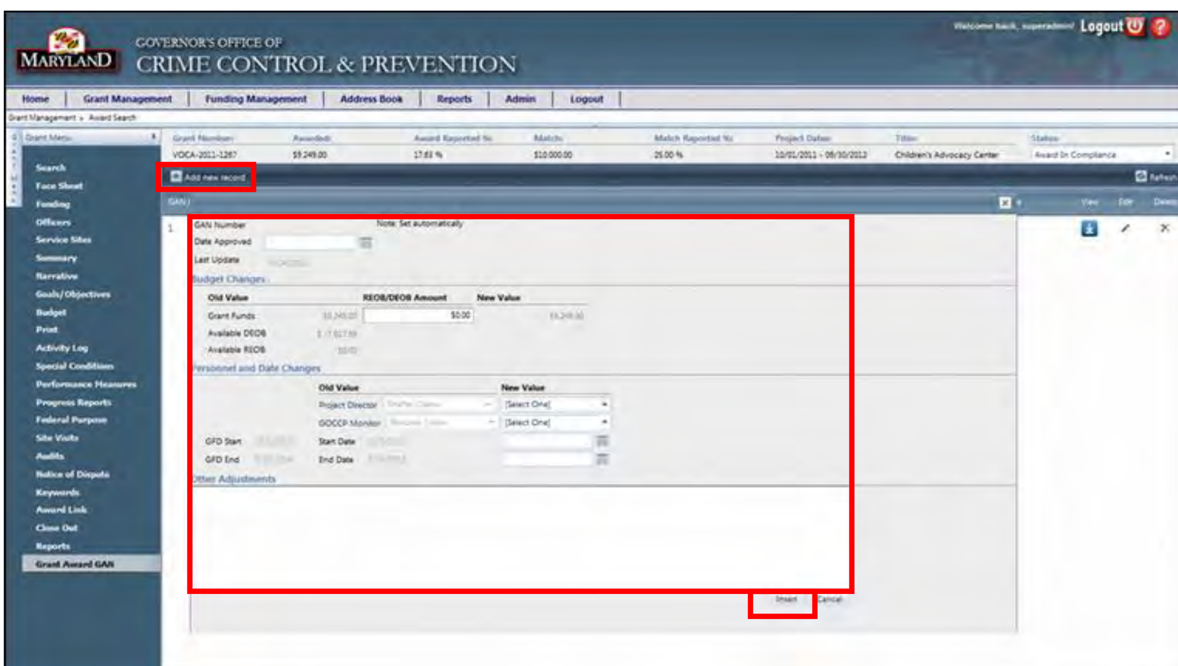


Figure 315 – Insert a new Grant Award Grant Adjustment Notice (GAN)

3. Click on the Insert button. The GAN is assigned a GAN # after it is approved; before approval it will have a GAN# of zero (0).

7.8.12 Modifying Grant Award Grant Adjustment Notices (GANs)

If there are multiple versions of the GANs against a single grant award, you will see the most recent one on top; ordered numerically.

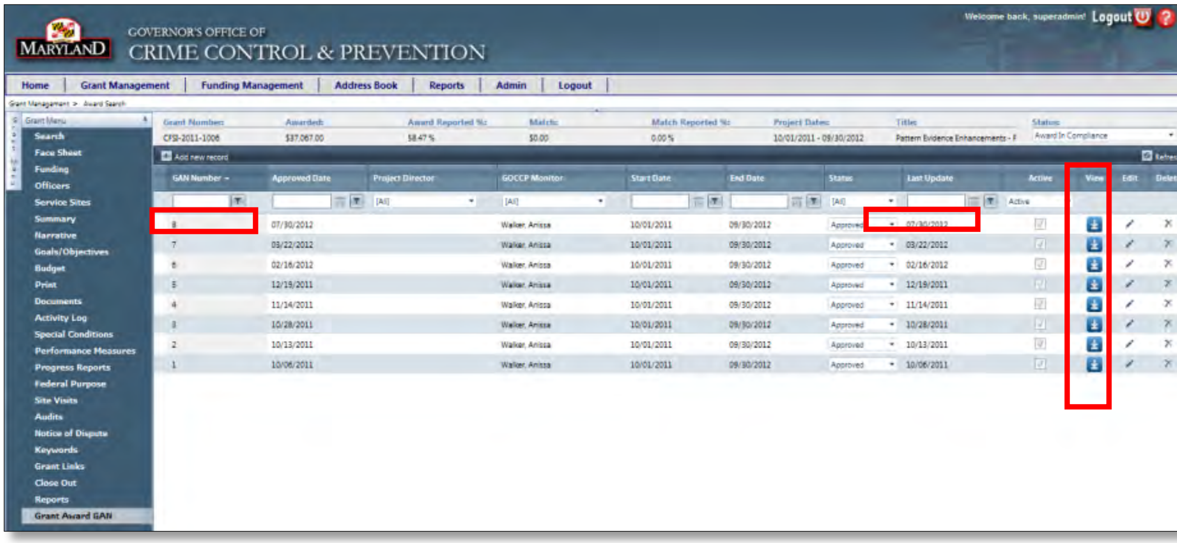


Figure 316 - Selecting a GAN to edit from List

1. You can edit each by clicking the Pencil Icon. Please note that GANs can only be edited while in status 'New'. If they are status 'Approved' – clicking on the Pencil Icon will allow the user to view the data in read-only format.

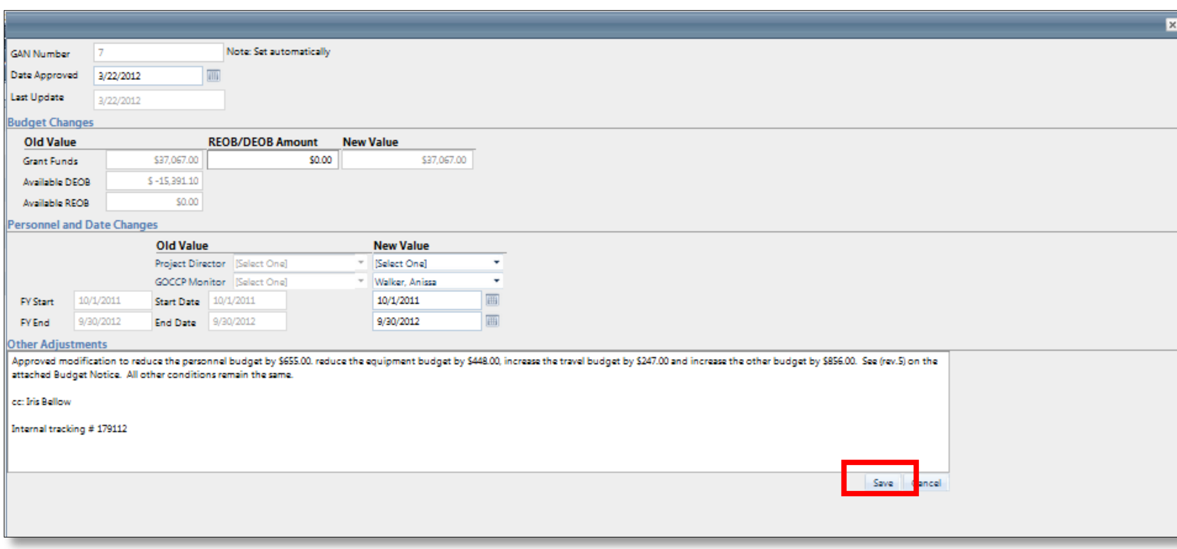


Figure 317 - Modify an existing GAN

2. To approve the GAN, click on the Status drop-down list and select Approved. It is only after a GAN is approved that the changes made on the data entry form are applied to the grant award.

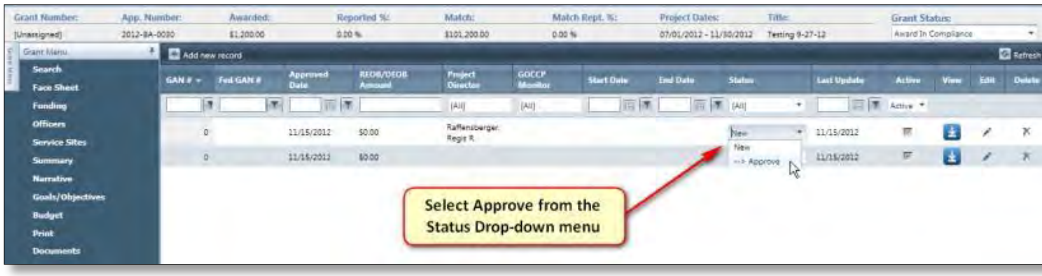


Figure 318 – Approve a GAN

7.8.13 Printing Grant Award Grant Adjustment Notices (GANs)

You can print each GAN by clicking the View icon to download to your local hard drive or print.

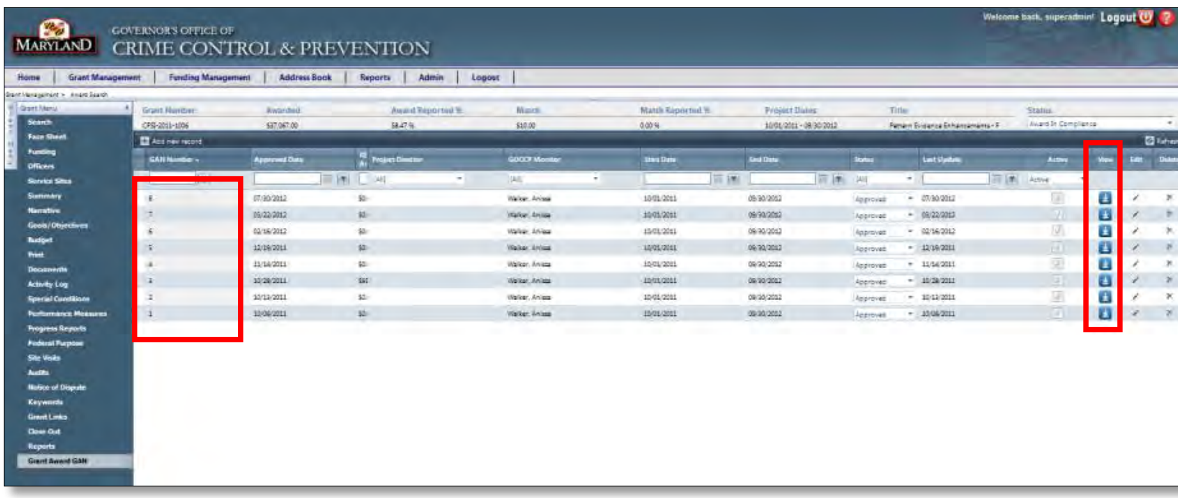


Figure 319 - Grant Award GAN print or download.

7.8.14 Close Out a Grant Award

The Close Out page provides a list of questions to be answered at the conclusion of the Award.

1. Select Close Out from the Grant Menu

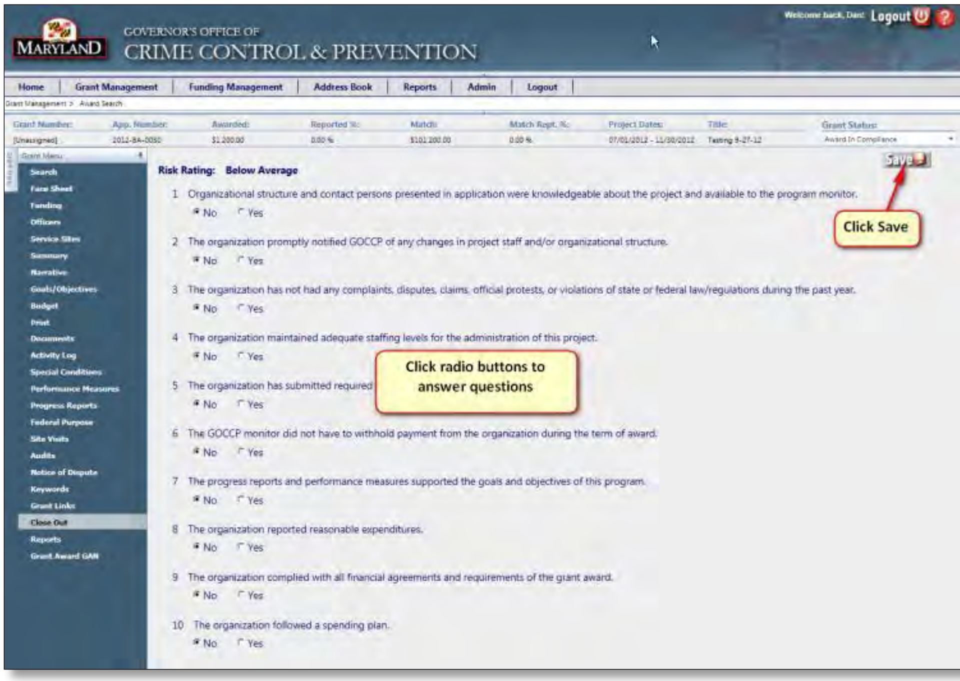


Figure 320 - Grant Award Closeout Screen

2. Answer each question by clicking on the Yes or No radio button beside each

3. Click the SAVE button

4. Click on the Grant Status drop-down menu and select Complete Closeout Process

Figure 321 - Grant Award Closeout Screen

5. Print the Close Out Form by clicking on Print in the Grant Menu and selecting Grant Award Close Out from the drop-down list.

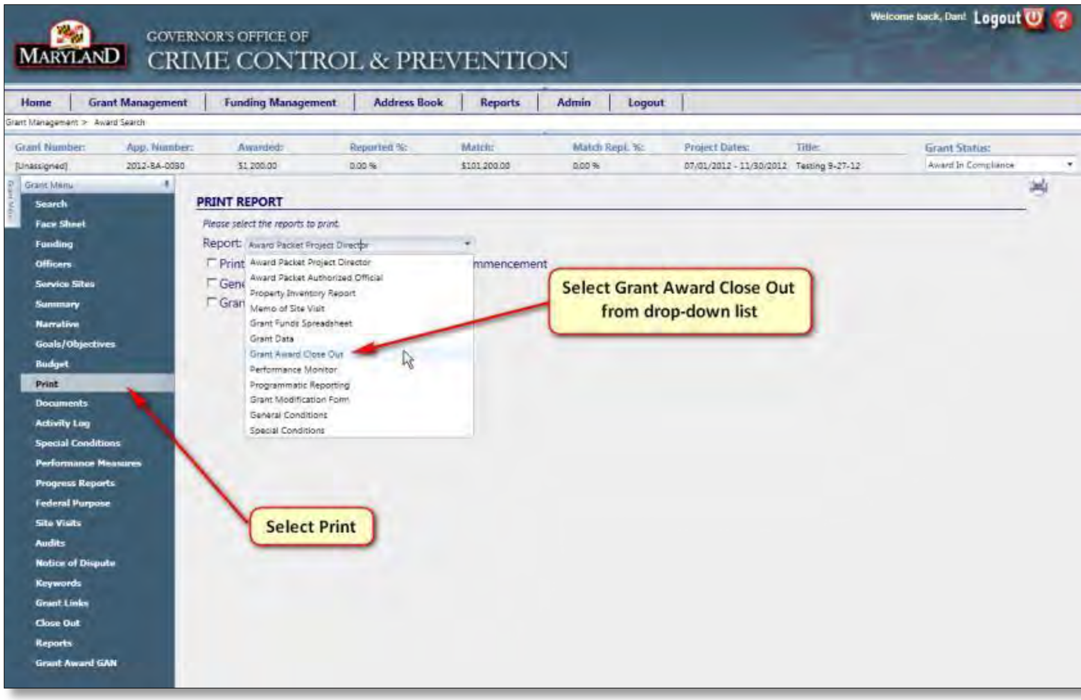


Figure 322 – Print Grant Award Close Out Form

6. Submit sub-award (grant) folder and signed Close Out form to the Control Desk for assignment to the appropriate Fiscal Specialist.

7.9 Folder Management

The Folder Management feature of GMS allows you to track the location of the physical folders that contain hardcopies of grant awards through an electronic check-in and check-out system.

Access the Check-In and Check-Out features by selecting Folder Management from the Grant Management menu:

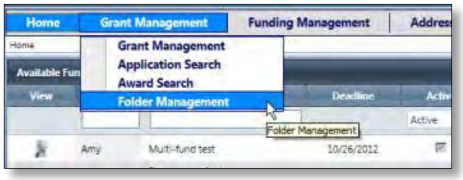


Figure 323 - Access the Folder Management Screen

The Folder Management screen is displayed:

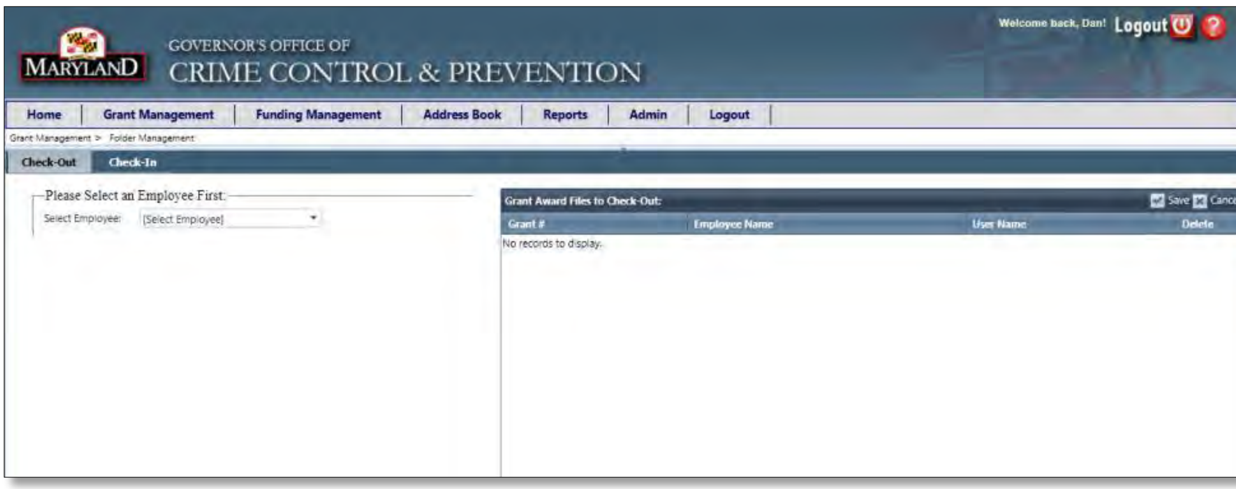


Figure 324 - GMS Folder Management Screen

7.9.1 Check-Out Folders

1. If it is not already highlighted, click on the Check-Out tab. Click the drop-down box next to Select Employee and select a name from the list.

2. After selecting an employee, the Grant Award # text box appears.

Figure 325 - Click Check-Out

3. Enter the Grant Award number in the text box beside Grant Award # and press the Enter Key.

Figure 326 - Enter Grant Award Number and Press the Enter Key

- NOTE: If you are using a barcode scanner, establish your cursor by clicking once inside the Grant Award # text box, and then proceed with scanning.

4. The Grant Award is added to the Grant Award Files to Check Out screen.

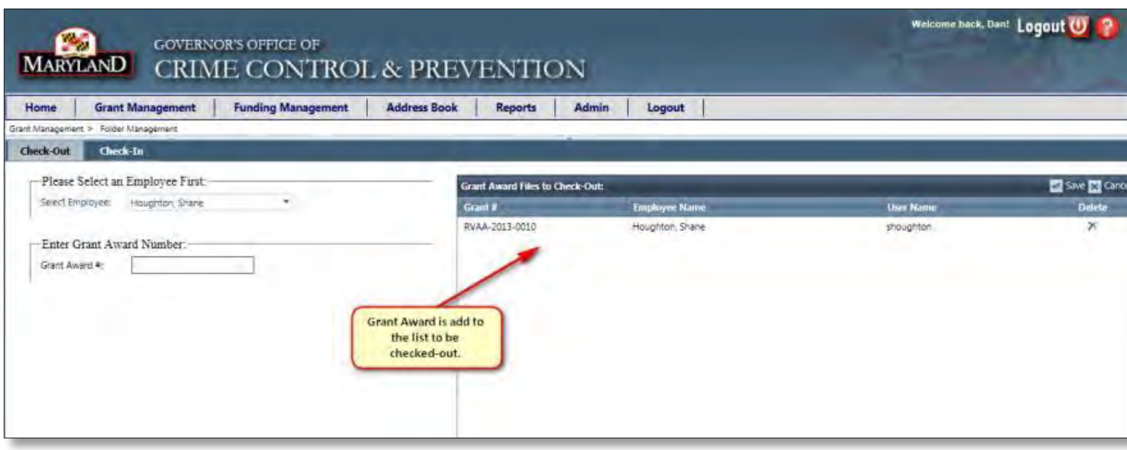


Figure 327 - Grant Award added to Check-Out List

5. Repeat this process for each Grant Award you want to check out. When you finish adding items to the list, click on the Save icon to check the files out. NOTE: If you do not click Save, you will lose your selections and the award files will not be checked out.

Figure 328 - Click Save icon to Check Out Files

7.9.2 Check-In Folders

1. Click on the Check-In tab.

Figure 329 - Click the Check-In Tab

2. Enter the Grant Award number in the text box beside Grant Award # and press the Enter Key.

Figure 330 - Enter Grant Award Number and Press the Enter Key

- NOTE: If you are using a barcode scanner, establish your cursor by clicking once inside the Grant Award # text box, and then proceed with scanning.

3. The Grant Award is added to the Grant Award Files to Check In screen.

Figure 331 - Grant Award added to Check-Out List

4. Repeat this process for each Grant Award you want to check in. When you finish adding items to the list, click on the Save icon to check the files in. NOTE: If you do not click Save, you will lose your selections and the award files will not be checked in.

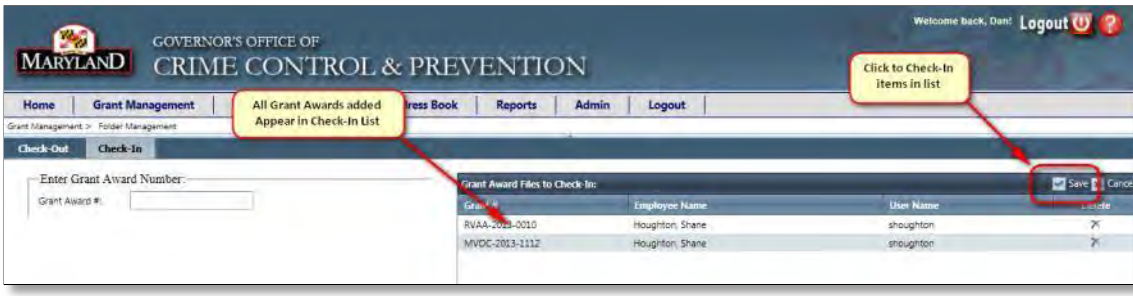


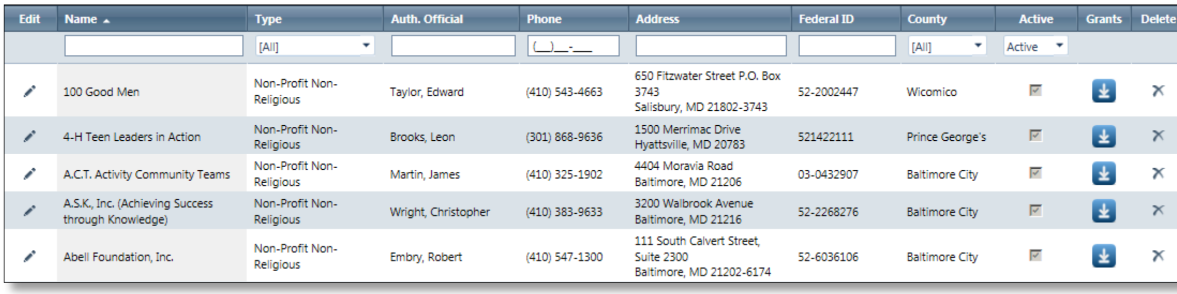
Figure 332 - Click Save icon to Check In Files

8 Address Book

8.1 Introduction

The GMS Address Book contains two databases – Organizations and Contacts:

1. The Organizations database is a central repository of all information about organizations that provide, utilize, or relate to Grant and Funding activities in GMS.



Edit	Name	Type	Auth. Official	Phone	Address	Federal ID	County	Active	Grants	Delete
		[All]		(__)__-__			[All]	Active		
	100 Good Men	Non-Profit Non-Religious	Taylor, Edward	(410) 543-4663	650 Fitzwater Street P.O. Box 3743 Salisbury, MD 21802-3743	52-2002447	Wicomico			
	4-H Teen Leaders in Action	Non-Profit Non-Religious	Brooks, Leon	(301) 868-9636	1500 Merrimac Drive Hyattsville, MD 20783	521422111	Prince George's			
	A.C.T. Activity Community Teams	Non-Profit Non-Religious	Martin, James	(410) 325-1902	4404 Moravia Road Baltimore, MD 21206	03-0432907	Baltimore City			
	A.S.K., Inc. (Achieving Success through Knowledge)	Non-Profit Non-Religious	Wright, Christopher	(410) 383-9633	3200 Walbrook Avenue Baltimore, MD 21216	52-2268276	Baltimore City			
	Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(410) 547-1300	111 South Calvert Street, Suite 2300 Baltimore, MD 21202-6174	52-6036106	Baltimore City			

Figure 333 - Address Book Organizations Database

2. The Contacts database stores information for all individual contacts that are associated with Organizations, Programs, Grants or Funding Sources in GMS.

Edit	Contact Name	Organization Name	Job Title	Phone	Fax	Email	Active	Delete
				(__)__-__	(__)__-__		Active	
	4a, RegressionUser	Aberdeen Police Department	Regression User	(410) 272-2121				
	6a, RegressionUser	Aberdeen Police Department	Regression User	(410) 272-2121				
	Abadia, Judy	Bureau of Governmental Research	Financial Coordinator	(301) 403-4403		jabadia@bgr.umd.dbu		
	Abaidoo, Kendra Watts	Ashburton Area Association, Inc.	President	(410) 664-7899		kendra.abaidoo@verizon.net		
	Abbott, Debbie	Town of Hurlock	Fiscal Officer	(410) 943-4181	(410) 943-8556	information@hurlockmd.net		
	Abbott, Doug	Carroll County Sheriff's Office	Fiscal Coordinator	(410) 386-2405	(410) 876-1152	dabbott@ccg.carr.org		
	Abbott, Douglas	Carroll County Board of County Commissioners	Fiscal Coordinator	(410) 386-2405	(410) 876-1152	dabbott@ccg.carr.org		

Figure 334 - Address Book Contacts Database

All information pertaining to Organizations and Contacts is added and updated via the Address Book in GMS. An organization or contact must be stored in these databases in order to be associated with grant applications and awards or funding programs.

3. In the Contacts database, you can associate an Organization with a contact.
4. Similarly, in the Organizations database, you can assign one or more contacts from the Contacts database to any given organization.

8.2 Organizations

Access the Organizations database by selecting Organizations from the Address Book menu:

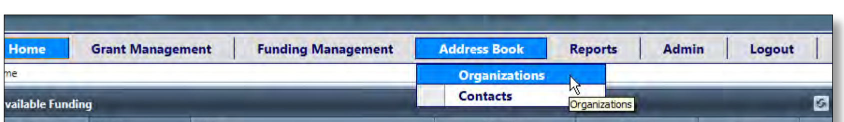


Figure 335 - Address Book -> Organizations

The Organizations screen is displayed:

Figure 336 - The Organizations Screen

From this screen, you can:

1. View all the available Organizations that can apply for or supply a Grant
2. Search for an Organization
3. View Contacts, Grants, and Documents associated with an Organization
4. Add Contacts to an Organization
5. Add a new Organization
6. Edit an Organization
7. Delete an Organization

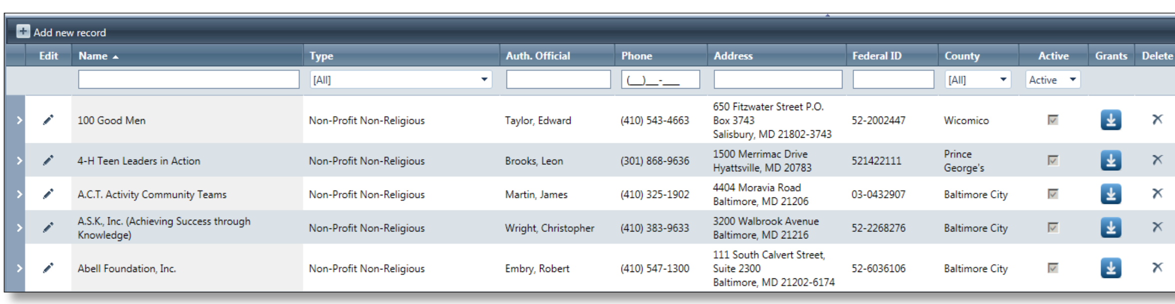


Figure 337 - GMS Organization Fields

The following columns of information are displayed for each organization record:

1. Organization Name
2. Type of Organization – Funding Organization by type, Grantee or Prime Recipient
3. Authorized Official – Last Name, First Name
4. Organization Phone Number
5. Address (Street, City, State, Zip)
6. Federal ID

7. County
8. Active Status

Three action columns are also included in this view:

1. **Edit**: Click the pencil icon in this column to edit the information for an organization
2. **Grants**: Click the icon in this column to download a PDF file that lists any grant awards this organization has received.
3. **Delete**: Click the X icon in this column to delete an organization from the database. Contacts which were part of this organization will still exist but will no longer be linked to the deleted organization. Awards or applications which had listed the organization before it was deleted will still do so, but the organization will no longer be assignable for applications, awards or contacts.

8.2.1 Expand and View an Organization Record

Scroll through the list and use the search/filter fields to locate the organization you wish to view. Refer to the section ***Sorting, Filtering, and Searching for Records*** for help with sorting, filtering, and searching for records.

1. When you locate the organization you want to view, click the expand icon to the left of the record.

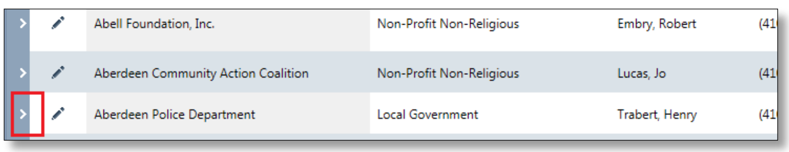


Figure 338 - Expand Organization Record

2. Organization information is displayed in tabs beneath the expanded record.

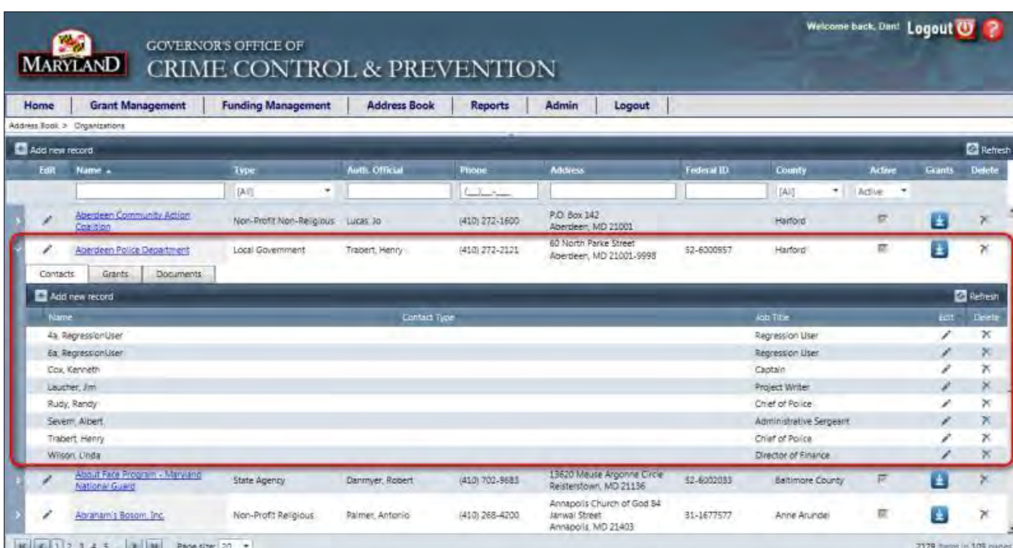


Figure 339 - Expanded Organization Record

8.2.1.1 Expanded Organization Record – Contacts Tab

Upon expanding an organization record, the Contacts tab is displayed by default. This tab displays a record for each contact that is associated with the expanded organization.

Figure 340 - Organization Record - Contacts Tab

The following columns are shown for each contact associated with the organization:

1. Name
2. Contact Type
3. Job Title

The following action columns are also displayed:

1. **Edit**: Click on the pencil icon in this column to edit the details of a contact.
2. **Delete**: Click the X in this column to delete a contact from the organization. This does not delete the contact from GMS or the Contacts database – it only deletes the association of the contact to the organization.

8.2.1.1.1 Add a Contact to an Organization

You can add a contact from the GMS Contacts database to an organization. Note: Adding a new Contact requires that the Contact exist in the Contact Directory. If not, then the Contact should be added to the Contact Directory first, and then added as a Contact to the Organization record. If the checkbox for Employer is selected, and the Start Date is entered, then the organization's address record will be included within the contact's record.

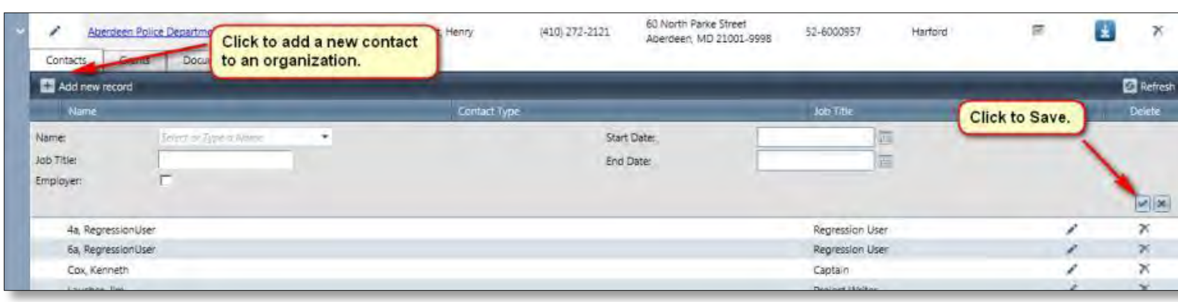


Figure 341 - Add a Contact to an Organization

1. Click on Add New Record at the top of the Contact tab.
2. Either select a Contact Name from the drop-down menu or begin to enter a Contact Name into Name box.
3. Enter a Job Title.

4. Enter the Start and End Date (if known) for the Contact. This information is important if a point of contact changes jobs but will still be participating with a grant's implementation.
5. The employer checkbox indicates if this person is an employee. It also updates the contact's address, phone and organization tabs to include the organization's values in each area as part of their own.

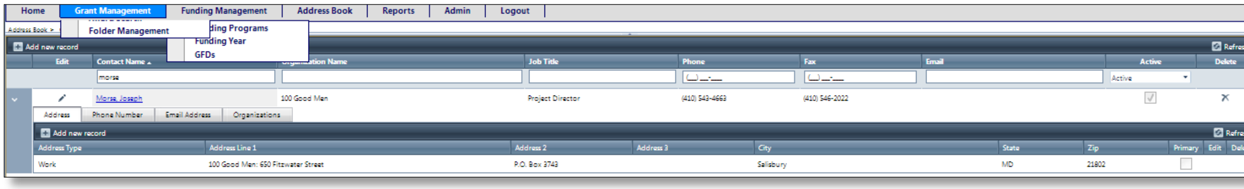


Figure 342 - Contact Record when Employer checkbox is checked

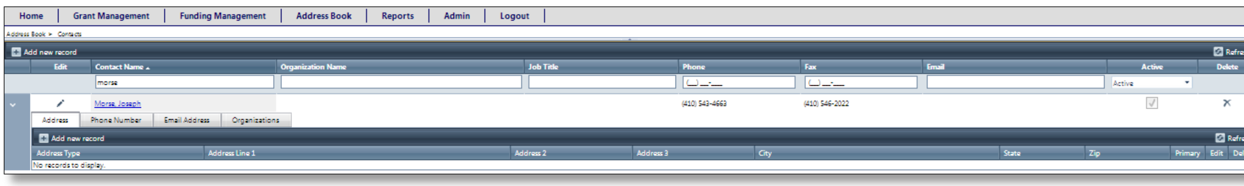


Figure 343 -Contact Record when Employer checkbox is not checked

6. Click on the checkmark icon in the lower right hand corner to save the contact record.

8.2.1.1.2 Edit a Contact Associated with an Organization

You can edit certain information about a contact from within the Organization database, including their Job Title, Employer status, Start Date, and End Date.

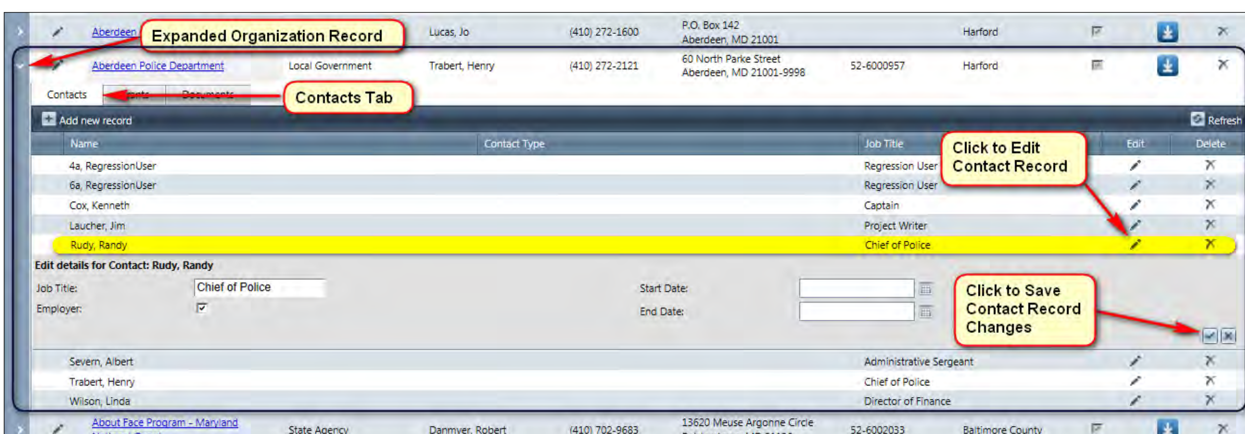


Figure 344 – Edit an Organization's Contact

1. Locate the contact you wish to edit and click on the pencil icon in the Edit column.
2. Make any appropriate changes to the contacts data.
3. Click on the checkmark icon in the lower right hand corner to save your changes, or click on the X button beside the checkmark to cancel the edit.

8.2.1.1.3 Delete a Contact from an Organization

You can delete a contact from an organization. The contact will remain in the GMS Contacts database, but will no longer be associated with the organization.

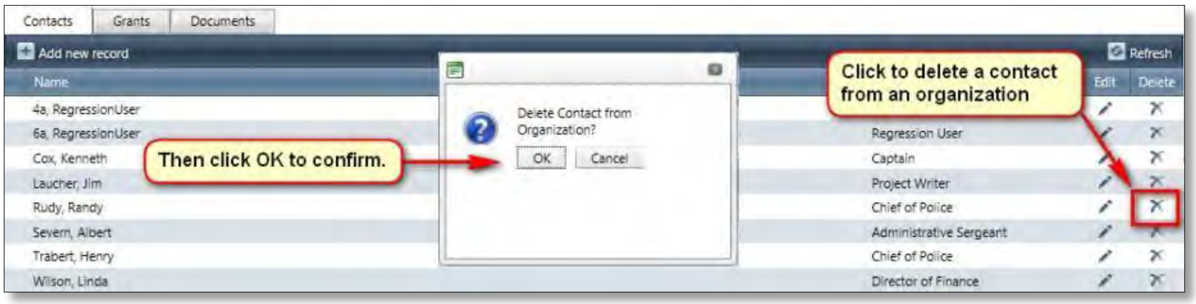


Figure 345 – Delete a Contact from an Organization

1. Locate the contact you wish to delete from the organization and click on the X icon in the Delete column.
2. When the "Delete Contact from Organization" dialog box appears, click the OK button to confirm or the Cancel button to cancel the delete process.

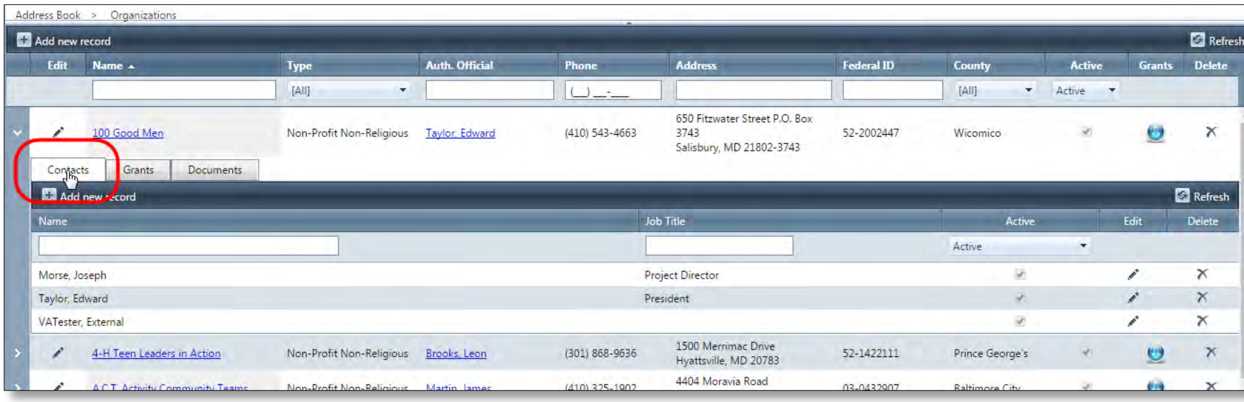
8.2.1.1.4 Designate Additional Award Packet Email Contact(s)

You can designate one or more Contacts for any Organization whom should receive award packet email notifications (in addition to the Authorized Official and the Project Director).

1. Go to the **Address Book --> Organizations** screen and locate the Organization associated with the Contact who should receive award packet email notifications.

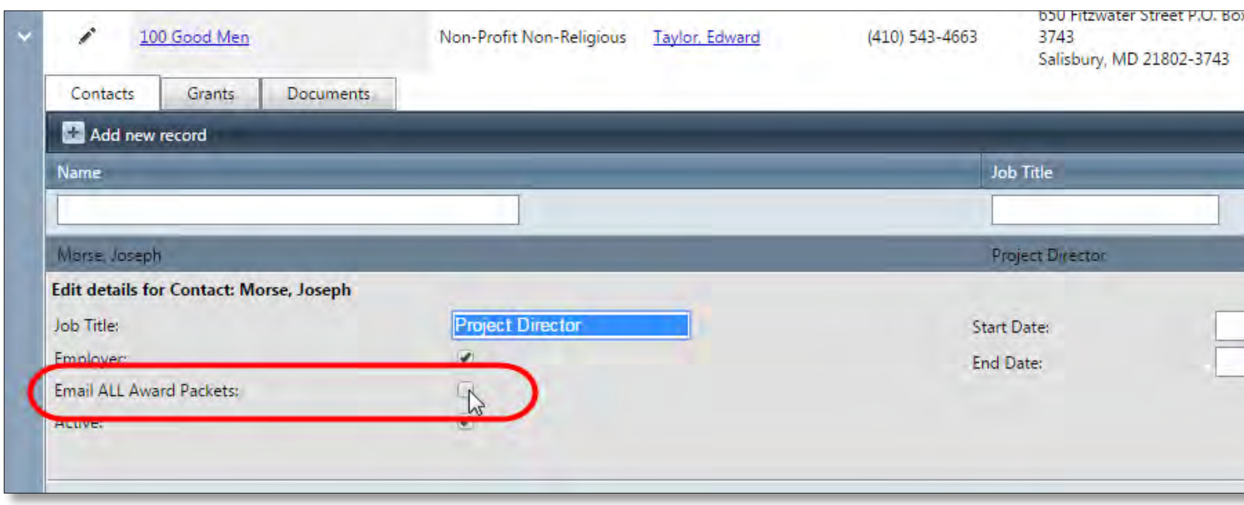
2. Click the **Expand** icon for that Organization.

3. Click the **Contacts** tab to highlight it.



4. Click the **Edit** pencil for the contact you wish to edit.

5. Click to place a checkmark in the **Email ALL Award Packets** checkbox.

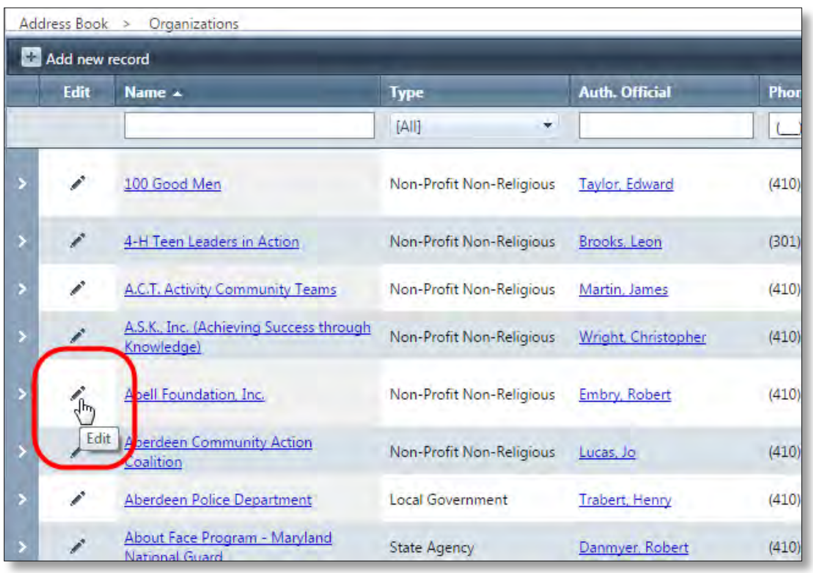


6. Click the checkmark icon at the far right to update the contact's record.

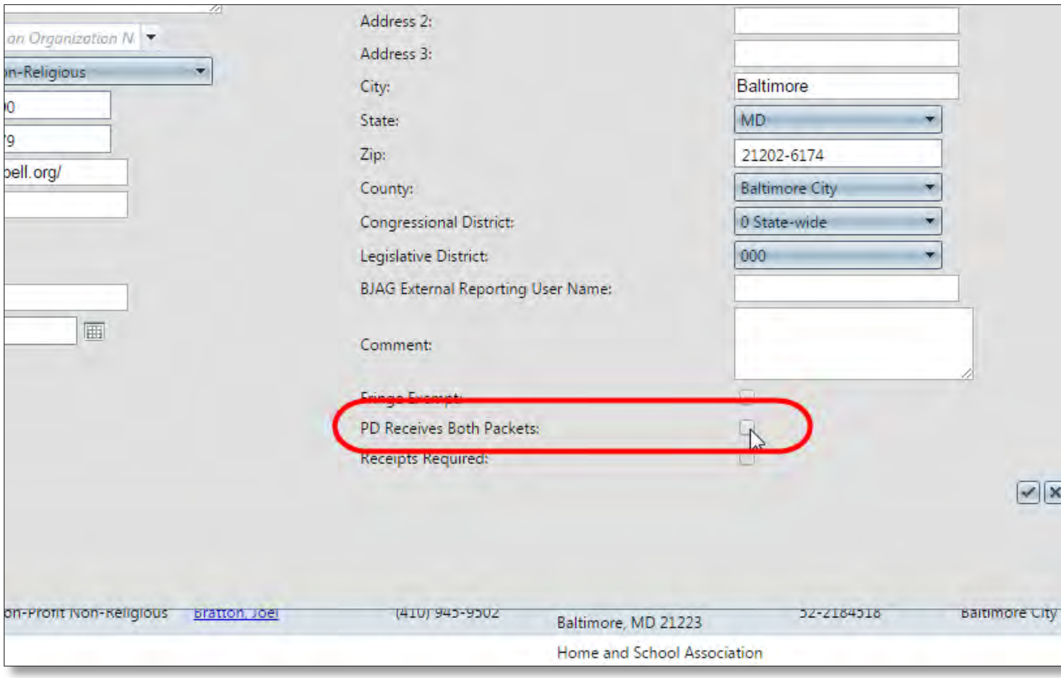
8.2.1.1.5 Denoting Where the Project Director Should be Emailed both Award Packet Notifications

You can denote in GMS when the Project Director should be emailed both Award Packet Notifications.

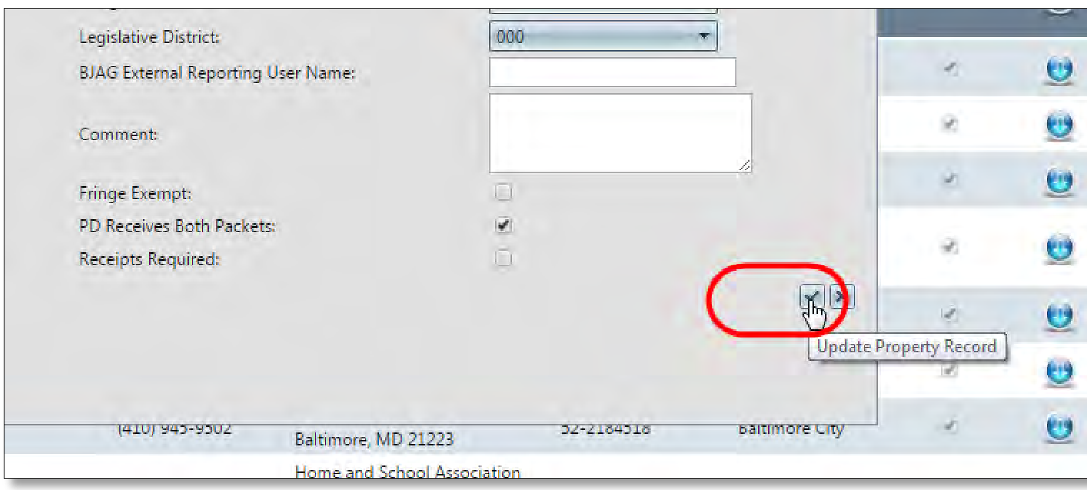
1. Go to the **Address Book --> Organizations** screen and locate the Organization.
2. Click the **Edit** pencil icon to the left of the organization name.



3. Click to place a checkmark in the **PD Receives Both Packets** checkbox.



4. Click the checkmark icon to save the update to the organization.



8.2.1.2 *Expanded Organization Record – Grants Tab*

Click on the Grants tab to view a list of all the grants awarded to the selected organization.

Figure 346 – Organization Grant Tab

The following columns are shown for each grant awarded to the organization:

1. Award Number (click to view grant summary in a popup window)
2. Applicant Agency
3. Implementing Agency
4. Project Title
5. Start Date
6. End Date
7. Project Director
8. Amount
9. County
10. Monitor
11. Status

The following action column is also displayed:

12. **Edit**: Click on the pencil icon in this column to edit the grant award. You will leave the Organizations database and be taken to the Grant Award Menu screen and you must navigate back to the address book menu item to return to the organization record:

8.2.1.3 Expanded Organization Record – Documents Tab

Click on the Documents tab to view a list of all the documents associated with the selected organization.

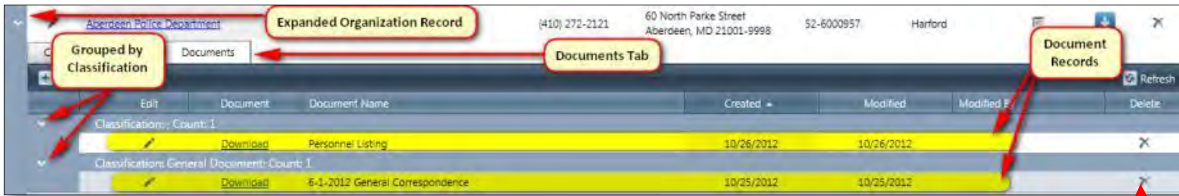


Figure 347 - Organization Record - Documents Tab

The following columns are shown for each document associated with the organization:

1. Document Name
2. Created (Date the document was uploaded)
3. Modified Date the document record was last modified)
4. Modified By (Contact who last modified document record)

The following action columns are also displayed:

1. **Edit**: Click on the pencil icon in this column to edit the document record.
2. **Document**: Click on the Download link in this column to download a copy of the document.
3. **Delete**: Click the checkmark in this column to delete the document if you have uploaded the incorrect item.

Document records display grouped by classification, which is a value you can assign to a document when adding or editing a document record.

8.2.1.3.1 Add a Document to an Organization

Adding a document to an organization involves uploading a file and providing information about it.

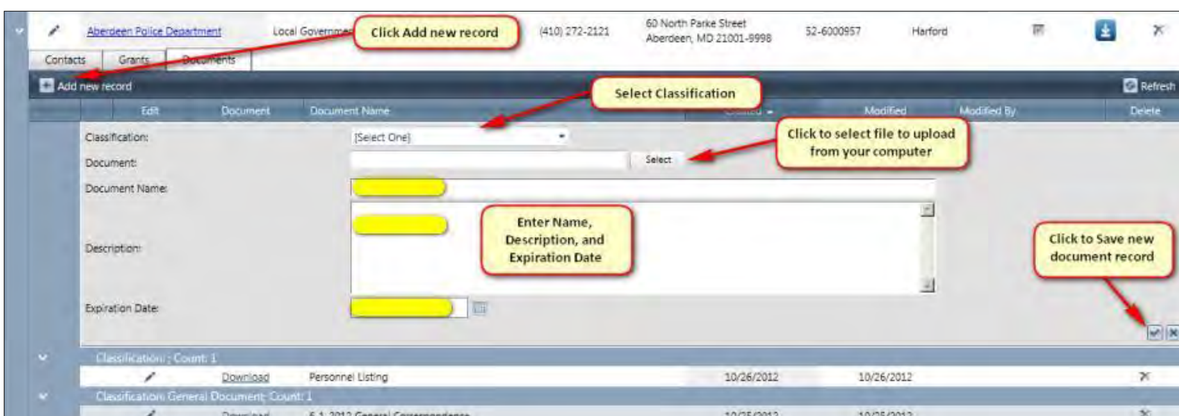


Figure 348 - Add Document to Organization

1. Click on Add New Record at the top of the Documents tab.
2. Select a Classification for the document from the drop-down menu.
3. Click the Select button. This will display a standard dialog box, shown in the figure below in the upper right corner that allows you to select a file from your computer to upload.

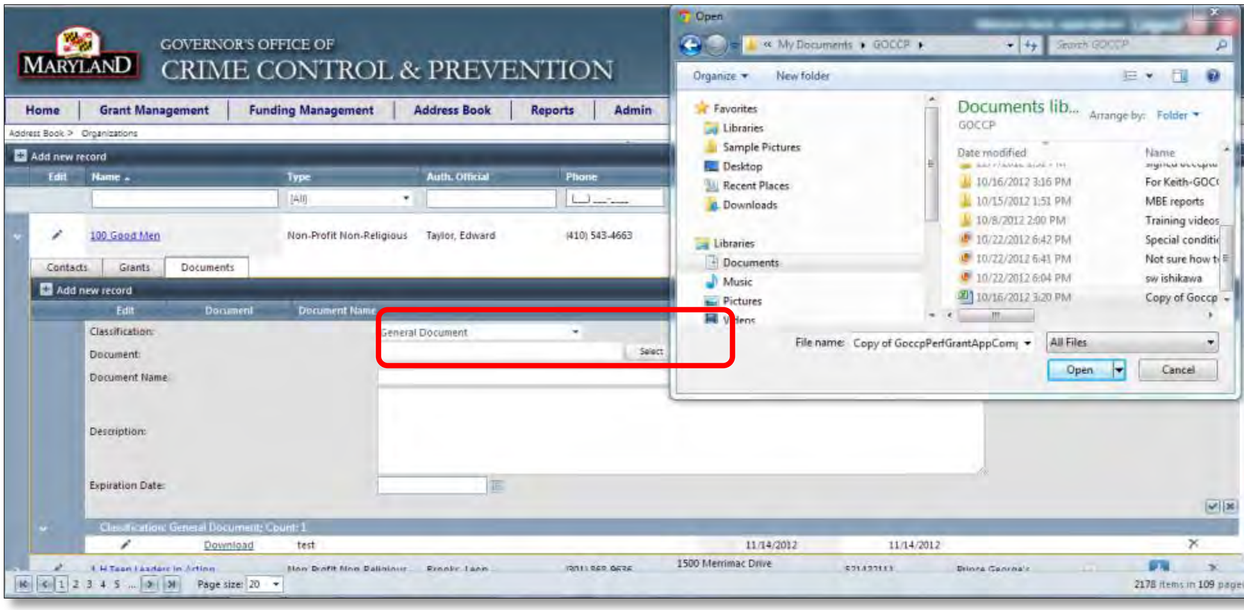


Figure 349 - Upload document file

4. If there is a green dot next to the file name of the file you just selected, you are ready to upload. If there is a red dot next to the file name, then the file cannot be successfully uploaded due to format or connection errors. If there is a yellow dot next to the file name it is still loading.

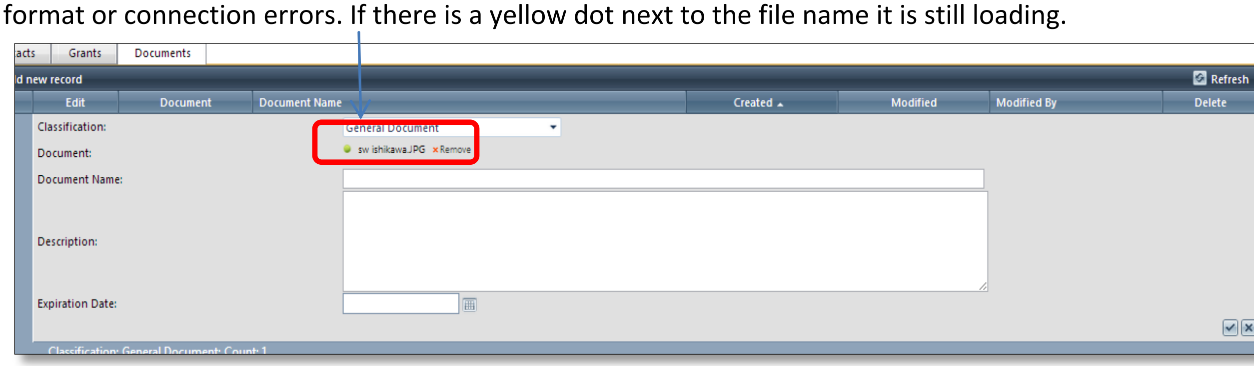


Figure 350 - Document status indicators in uploading to the Documents section

5. Enter a descriptive name for the document. This will be the name of the document record and does not have to be the same name as the file you upload.
6. Enter a detailed description of the document into the Description field.
7. If applicable, enter a date into the Expiration Date field. This indicates the date after which the information in this document is no longer valid.
8. Click on the checkmark icon in the lower right hand corner to save the new document record.

8.2.1.3.2 Edit a Document Record in an Organization

You can edit certain information about a document record associated with an organization, including the documents classification and the records name, description, and expiration date.

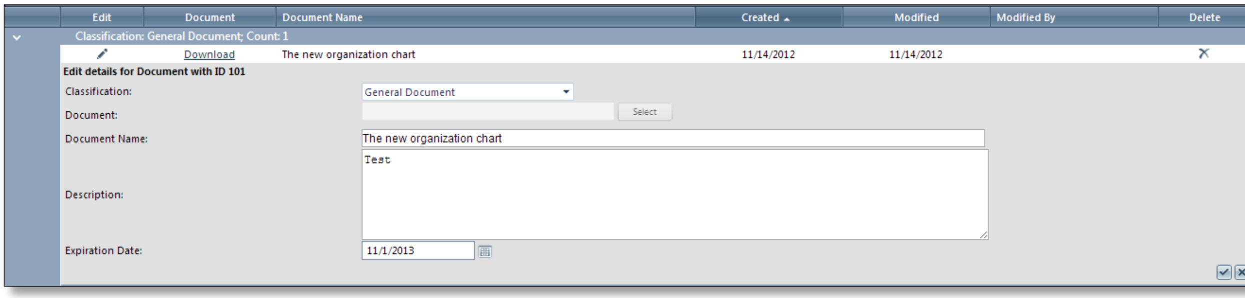


Figure 351 - Edit a Document Record for an Organization

1. Locate the document you wish to edit and click on the pencil icon in the Edit column.
2. Make any appropriate changes to the contacts data and optionally change the classification.
3. Click on the checkmark icon in the lower right hand corner to save your changes, or click on the X button beside the checkmark to cancel the edit.

8.2.1.3.3 View or Download a Document Record in an Organization

1. Locate the document you wish to view and click on the Download link. If the file name can be renamed if desired during download but by default is the same as shown in the download screen.

8.2.1.3.4 Delete a Document Record in an Organization

1. Locate the document you wish to delete and click on the checkmark in the Delete column to delete, click Ok to continue.

Figure 352- Download, View or Delete a Document record

8.2.2 Add an Organization

1. Access the Organizations database by selecting Organizations from the Address Book menu:

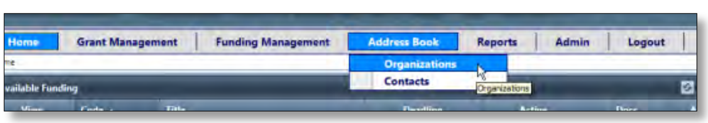


Figure 353 - Access the Organizations Screen

2. Click Add New Record from the Organizations screen.

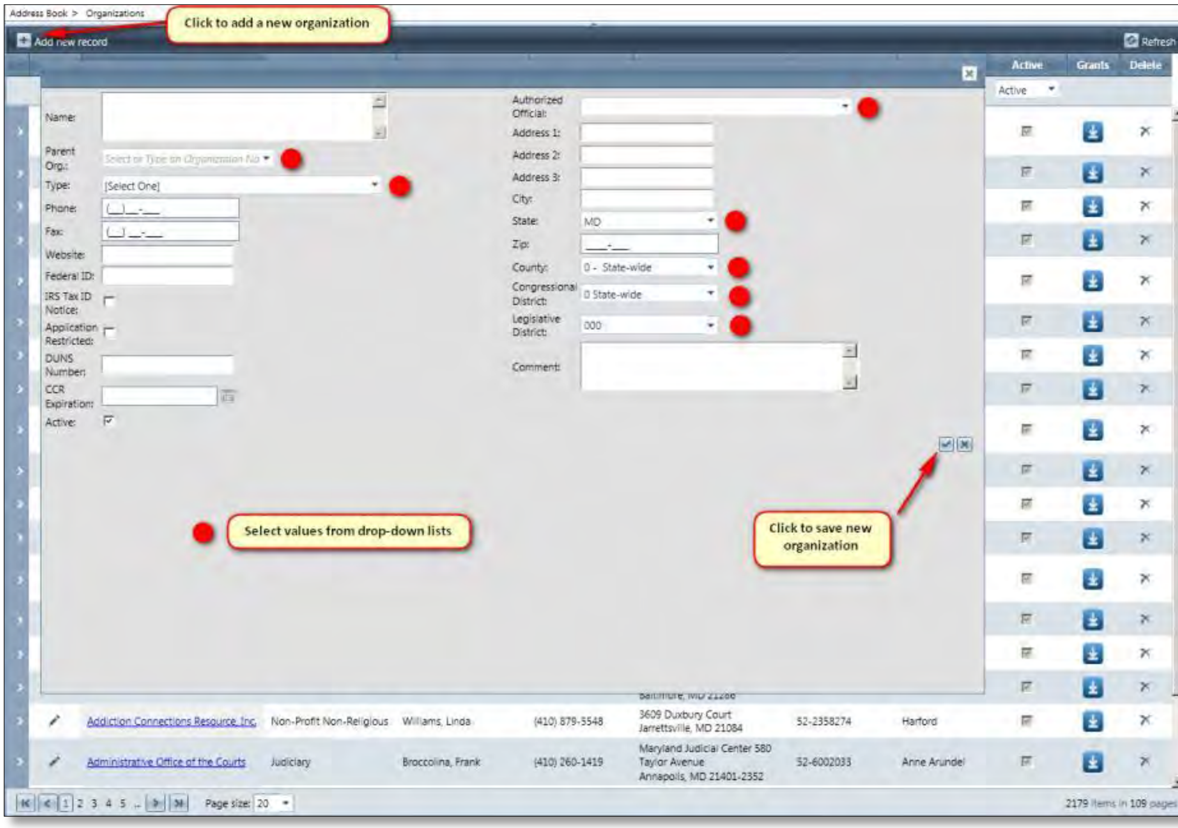


Figure 354 - Add New Organization

3. Enter information about the organization into the data fields as follows. Where applicable, select values from drop-down lists. *At a minimum, the Organization Name and Type are required to create an Organization record*.

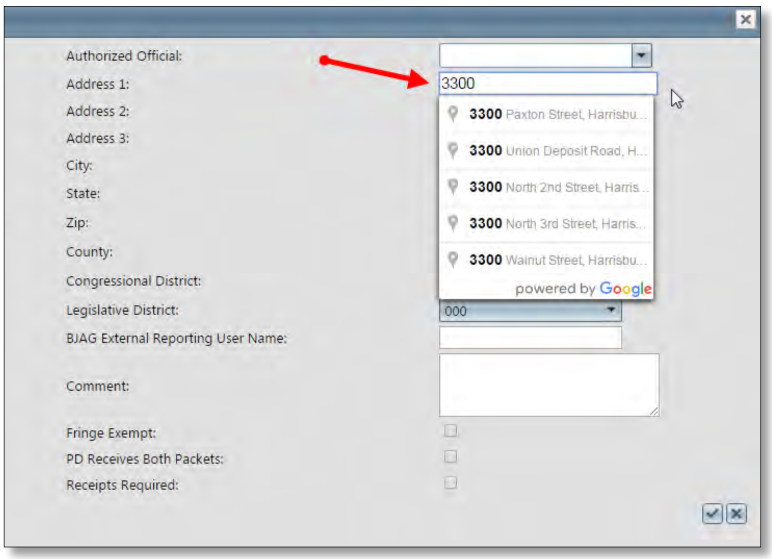
- **Name**: Organization Name (required)
- **Parent Organization**: Select from drop-down list if applicable
- **Type**: Select from drop-down list (required)
- **Phone**: Provide primary phone number for organization
- **Fax**: Provide primary fax number for organization
- **Website**: Provide URL if the organization has a website
- **Federal ID**:
- **IRS Tax ID Notice**: Place a checkmark in this box if the organization has a W-9 on file
- **Application Restricted**: Place a checkmark in this box if applicable (requires Parent Organization)
- **DUNS Number**: Provide DUNS number (nine characters, no punctuation)
- **CCR Expiration**: Either type in the date or select it using the calendar icon
- **Active**: Place a checkmark in this box to make the organization active in GMS (default is checked)
- **Authorized Official**: Select a contact from the drop-down list. The contact must exist in the GMS contacts database to be selected here
- ****Address Fields**: Enter the physical address of the authorized official for the organization
- **Congressional District**: Select from the drop-down list

- **Legislative District**: Select from the drop-down list
- **Comment**: Enter any notes or descriptions provided by the organization

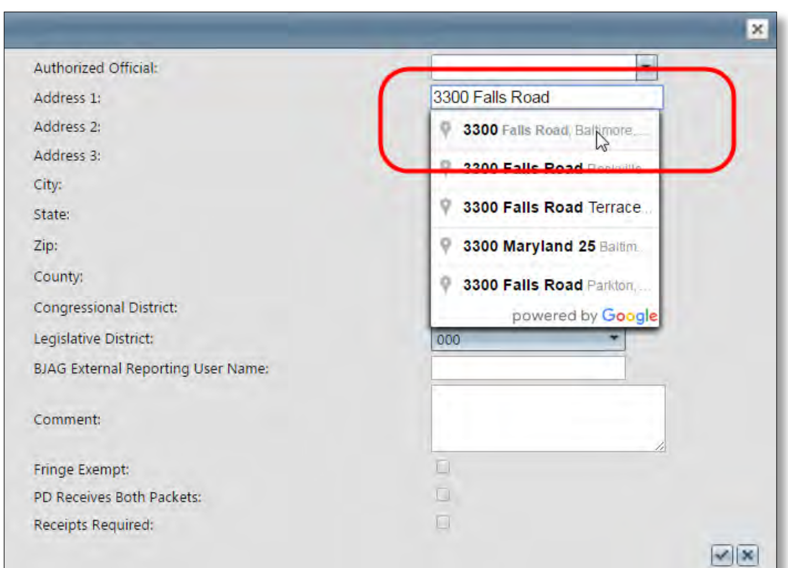
4. **Save.**

****ADDRESSES NOTE**: To avoid any ambiguity or errors when entering information into address fields, GMS has implemented Google auto-complete for addresses. This process works whether the address is for a new organization, or is being edited for a current organization.

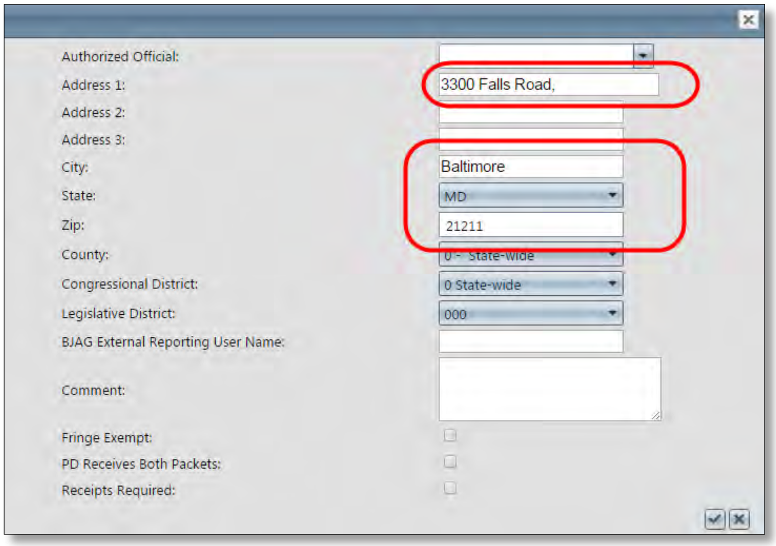
1. Place your cursor in the field for **Address 1** and begin typing the address. Immediately you will see a drop-down list with suggestions based on what you typed:



2. The more you type, the more the address will be narrowed down. When you find the address you're looking for, click on it in the drop-down list.



3. Note that the City, State, and Zip will be populated correctly:

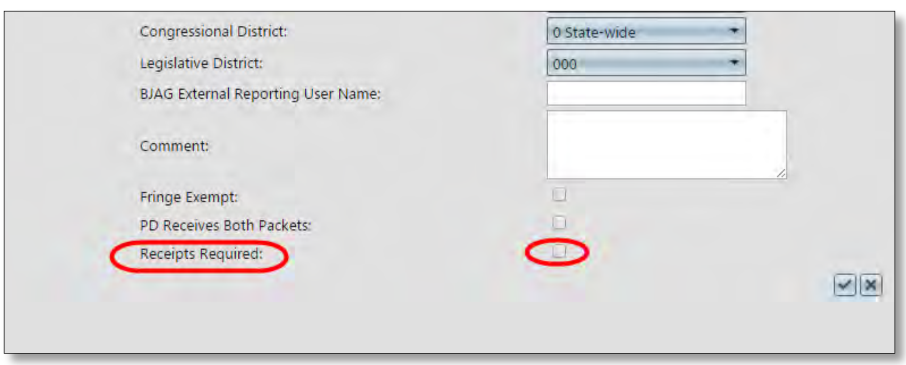


4. NOTE: Google will not auto-populate the Address2 and Address3 fields, so items like Suite numbers must by manually entered.

8.2.2.1 Assign Organizations to the Audit List (Permissions Allowing)

Auditors need the ability to carry out audit procedures on certain applicants and monitor them. This can be accomplished through a new field on the Organizations screen.

1. Add a new organization or edit a current organization. You will see a field called "Receipts Required" and an empty checkbox next to it.



2. To assign an Organization to the Audit list, click to place a check in the checkbox next to "Receipts Required".

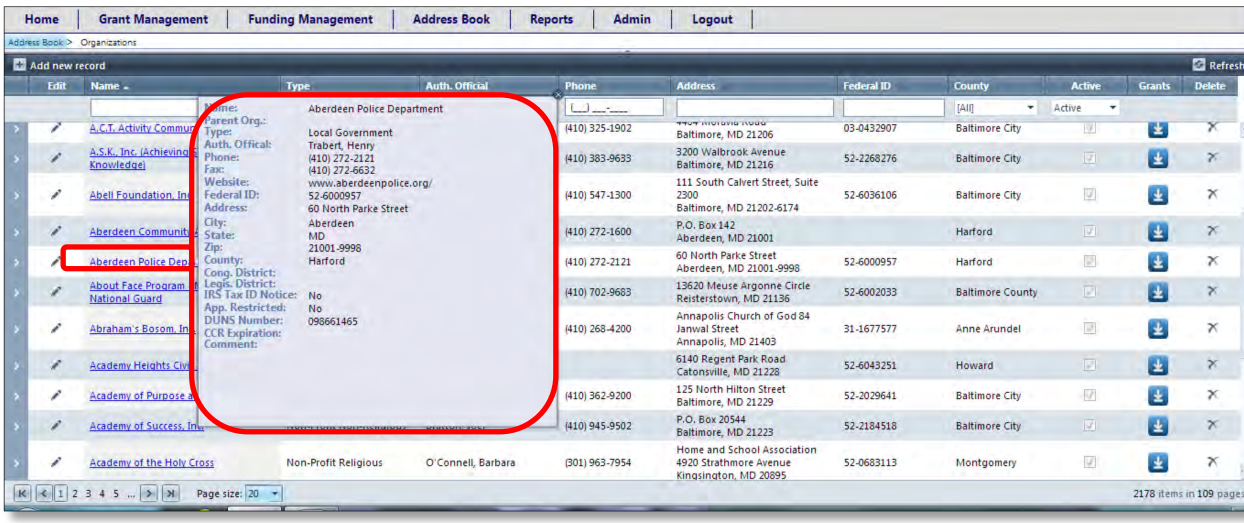
3. Click on the checkmark icon to save your changes.

8.2.3 Edit an Organization

4. Click on the pencil icon in the Edit column of the record you wish to edit.

Figure 355 – Access the Organization Edit Screen

5. If you do not have the ability to edit an organization, click on the link for the organization name to see a tooltip with all of its details.



6. Modify any applicable fields, then click the checkmark to save your changes. Refer to the section ***Add an Organization*** above for descriptions of the data fields.

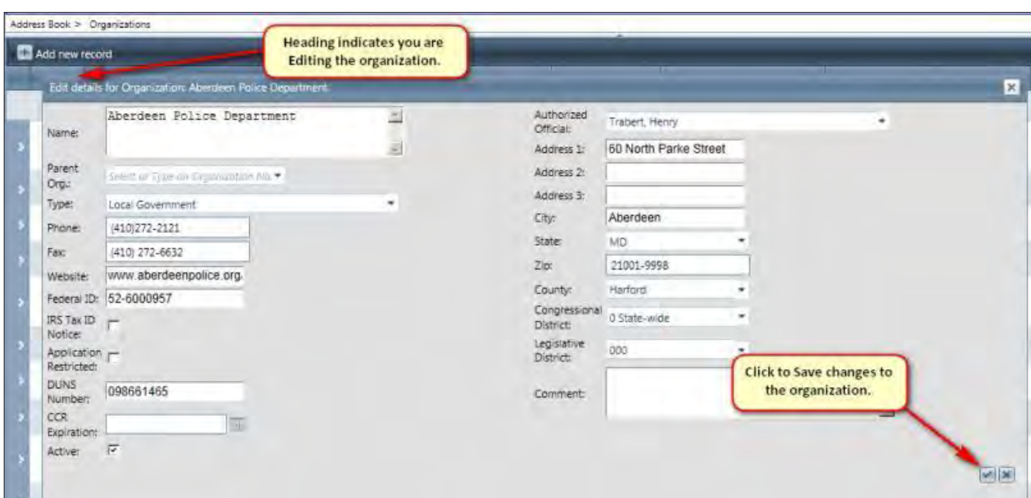
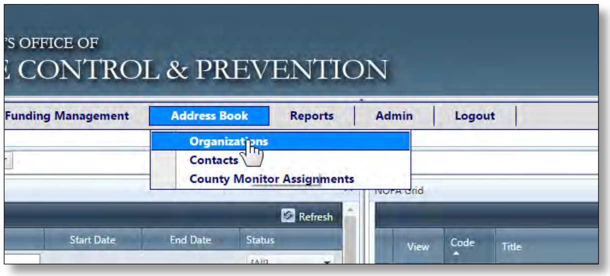


Figure 356 - Edit an Organization

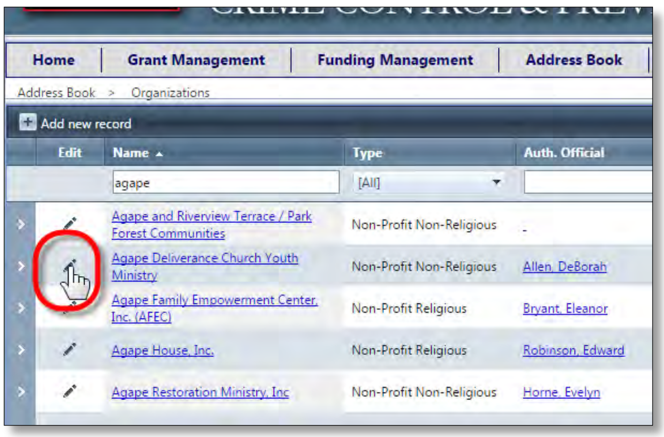
8.2.4 Validate an Organization as Tax Exempt

In order for a tax-exempt organization's grant application to processed by GOCCP, the Tax Exempt Valid checkbox on the organization's screen must be checked. To do this:

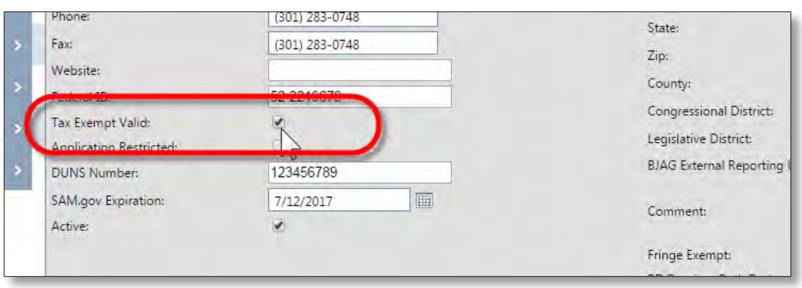
1. Go to Address Book -> Organizations



2. Locate the Organization, then click the Pencil icon in the Edit column for that Organization.



3. Click to place a check in the checkbox next to Tax Exempt Valid:



4. Click the checkmark icon to save your changes.

8.2.5 Delete an Organization

You can delete an existing Organization from the GMS Organizations database. *However, deleting an Organization should go through internal approvals as all the related Program, Grant and activity data of the Organization will also be deleted*.

1. Click on the X icon in the Delete column of the record you wish to delete.

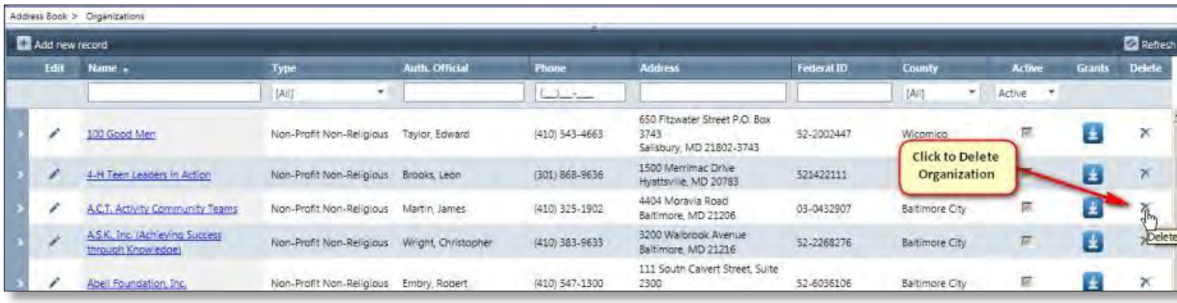


Figure 357 - Delete an Organization

2. Click the OK button when the delete-confirmation dialog box appears. If you click the Cancel button, the organization will not be deleted.

Figure 358 - Confirm Deletion of Organization

8.3 Contacts

Access the Contacts database by selecting Contacts from the Address Book menu:

Figure 359 - Address Book -> Contacts

The Contacts screen is displayed:

Figure 360 - The Contacts Screen

From this screen, you can:

1. View all of the Contacts in the GMS database
2. Search for a Contact: (Please note when searching for a contact searches for a first and last name must be entered specifically as the data would be formatted in this column including suffix and all appropriate commas. For example, searching for the former Police Chief of Baltimore City Police: Frederick Bealefeld III would require the user to enter:

   Bealefeld III, Frederick H

3. Add Contacts to an Organization
4. Add a new Contact
5. Edit a Contact
6. Delete a Contact

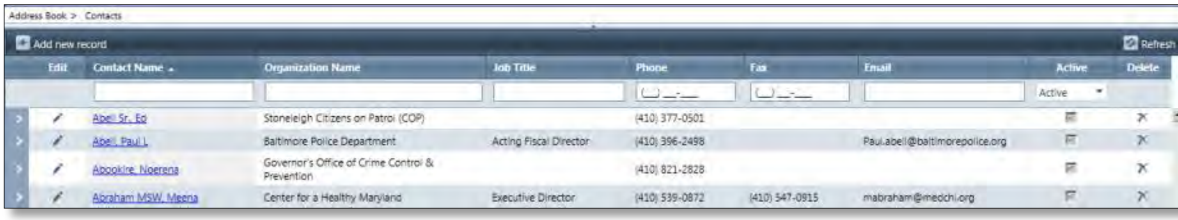


Figure 361 - GMS Contact Fields

If you do not see a pencil in the Edit column on the left side, then click the name of the contact to see the details about it.

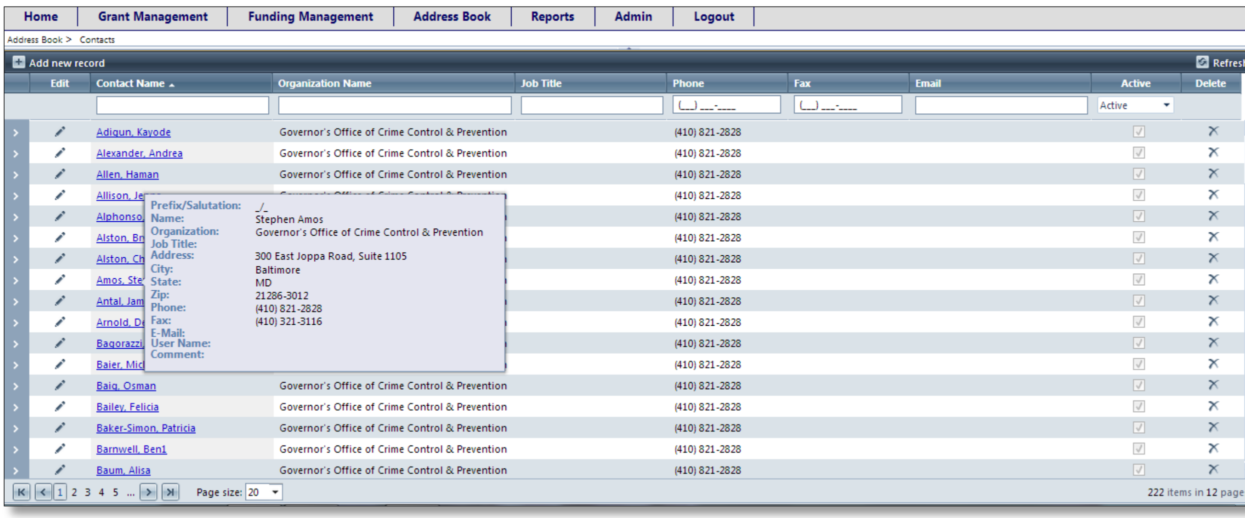


Figure 362 - View contact details when you do not have the ability to edit

The following columns of information are displayed for each organization record:

1. Contact Name
2. Organization Name (organization that the contact is assigned to)
3. Job Title
4. Phone
5. Fax
6. Email
7. Active Status

Three action columns are also included in this view:

8. **Edit**: Click the pencil icon in this column to edit the information for an organization
9. **Delete**: Click the X icon in this column to delete an organization from the database.

8.3.1 Expand and View a Contact Record

Scroll through the list and use the search/filter fields to locate the contact you wish to view. Refer to the section ***Sorting, Filtering, and Searching for Records*** for help with sorting, filtering, and searching for records.

1. When you locate the contact you want to view, click the expand icon to the left of the record.

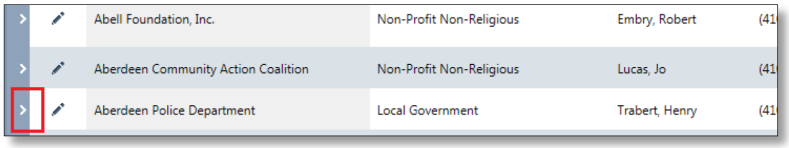


Figure 363 - Expand Contact Record

2. Contact information is displayed in tabs beneath the expanded record.

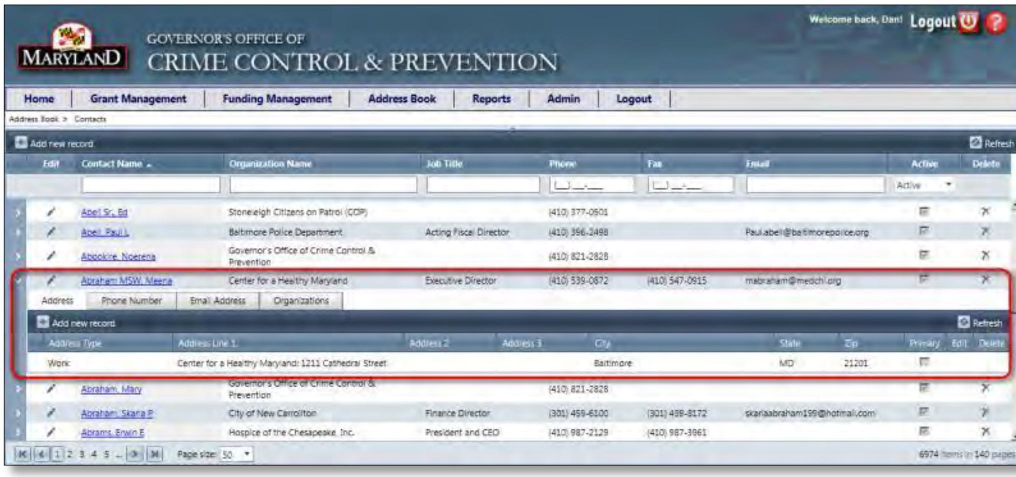


Figure 364 - Expanded Contact Record

8.3.1.1 *Expanded Contact Record – Information Tabs*

A contact's information is displayed in four tabs beneath the contact record when it is expanded. Each tab contains one record for each information type, for example if the contact has several phone numbers (work, home, etc), each phone number will be displayed as a separate record within the Phone Number tab. The tabs are:

1. Address
2. Phone Number
3. Email Address
4. Organizations

Upon expanding a contact record, the Address tab is displayed by default. For descriptions of each tab, refer to the section ***Edit a Contact***.

Figure 365 - Contact Record – Contact Information Displayed in Tabs

8.3.2 Add a New Contact

1. Click Add New Record from the Organizations screen.

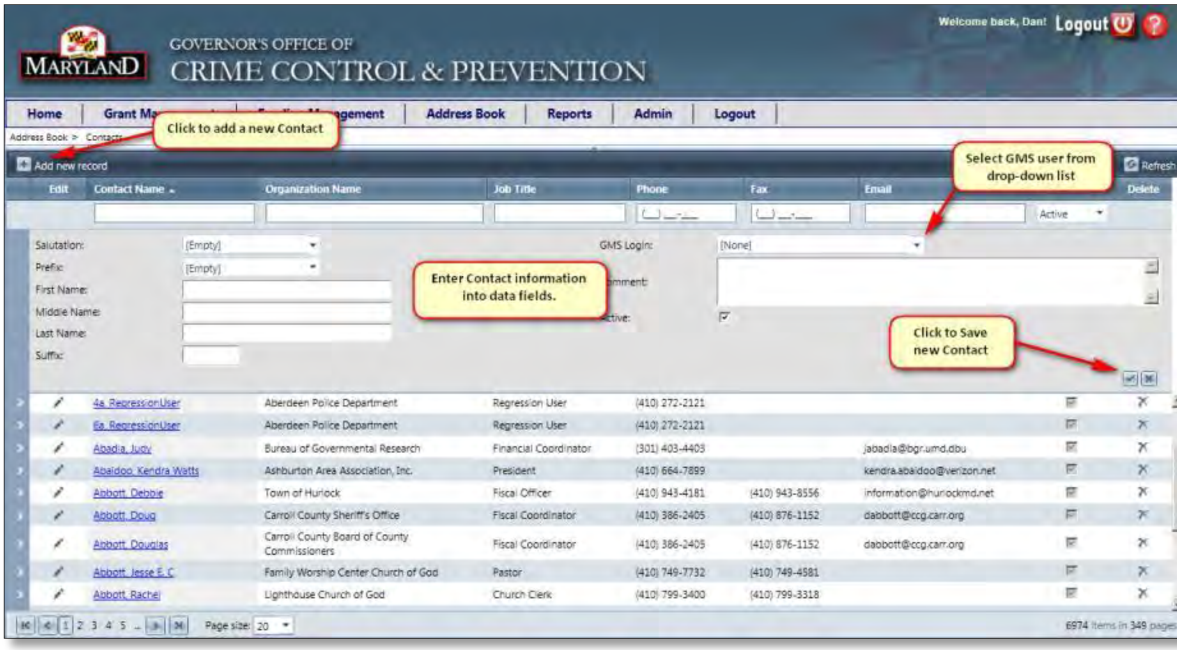


Figure 366 - Add New Contact

2. Enter information about the contact into the data fields as follows. Where applicable, select values from drop-down lists. *At a minimum, the First Name and Last Name are required to create a Contact record*.

   - Salutation (optional)
   - Prefix (optional)
   - First Name (required)
   - Middle Name (optional)
   - Last Name (required)
   - Suffix (optional)
   - GMS login (Select from drop-down menu)
   - Active status – defaulted with a check for Active

3. Click the checkmark icon in the lower right corner to save the new contact.

You are taken back to the main Contacts screen. At this point the new contact has been saved and is now in the GMS database, and you can now add addresses, phone numbers, and email addresses to the new contact, and associate the new contact with an organization. Refer to the section ***Edit a Contact*** for instructions on adding information to a contact.

4. To quickly locate the new contact you just added, type the full or partial name into the Contact Name field in the column heading and press Enter.

Figure 367 - Locate New Contact Record

5. The search executes and the newly added contact record is displayed. See the following section for instructions for adding additional information to the new contact.

8.3.3 Edit a Contact

Locate the contact you wish to edit – refer to the section ***Sorting, Filtering, and Searching for Records*** for help locating a contact in the database.

8.3.3.1 Editing High-Level Contact Information

1. When you locate the contact you wish to edit, click the Expand arrow next to the record:

Figure 368 - Expand Contact Record

2. To edit high-level contact information, click the Pencil icon in the Edit column. This will display the high-level contact data entry screen – the same screen used when initially adding a contact.

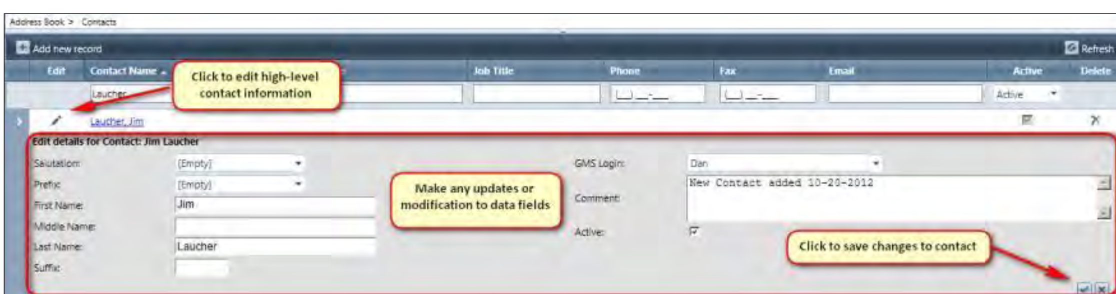


Figure 369 - Edit High-Level Contact Details

3. Click on the checkmark icon in the lower right corner to save changes to the contact.

8.3.3.2 Editing Contact Information in Tabs

Use the tabs located below the expanded contact record to add or edit a contact's addresses, phone numbers, and email addresses, and to assign the contact to an organization.

Figure 370 - Add New or Edit Existing Contact Information in Tabs

5. *The following procedures describe how to add new information to a contact. The same procedures apply for editing records in tabs for a contact – you will just click the pencil icon in the Edit column of the record instead of clicking the Add New Record icon.*

8.3.3.2.1 Add an Address to a Contact

1. Click on the Address tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Address tab for the expanded contact record.

Figure 371 - Add a new Address to a Contact

3. Enter the new address information into the data fields. Place a checkmark into the Primary checkbox if this address is the contact's primary address.
4. Click on the checkmark in the lower right corner to save the new address.

8.3.3.2.2 Add a Phone Number to a Contact

1. Click on the Phone Number tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Phone Number tab for the expanded contact record.

Figure 372 - Add a new Phone Number to a Contact

3. Select the Phone Number type from the drop-down list.

4. Type the area code and phone number into the Phone Number field. Enter an extension in the Extension field if applicable.
5. Place a checkmark into the Primary checkbox if this address is the contact's primary phone.
6. Click on the checkmark in the lower right corner to save the new phone number.

8.3.3.2.3 Add an Email Address to a Contact

1. Click on the Email Address tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Email Address tab for the expanded contact record.

Figure 373 - Add a new Email Address to a Contact

3. Select the Email Address type from the drop-down list.
4. Type the email address into the field.
5. Place a checkmark into the Primary checkbox if this is the contact's primary email address.
6. Click on the checkmark in the lower right corner to save the new email address.

8.3.3.2.4 Add an Organization to a Contact

1. Click on the Organizations tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Organizations tab for the expanded contact record.

Figure 374 - Add an Organization to a Contact

3. Click on the Name drop-down list to display a listing of all the organizations in the GMS Organizations database that are available to you. If you know the organization name, you can begin typing it to find it in the list. When you find the correct organization, click on it to select it.
4. If the organization is the contact's employer, enter the contact's job title into that field and place a checkmark in the Employer box.

   The employer checkbox indicates if this person is an employee. It also updates the contact's address, phone and organization tabs to include the organization's values in each area as part of their own.

The following logic pertains to the Employer checkbox on the association between Contact and Organization:

1. A contact may only have one (1) employer at a time. All previously selected Employer values for the given contact are cleared when a record is saved with the Employer checkbox checked.
2. The organization name shown on the Contact Search Grid is the one selected as Employer
3. Work Address and Work Phone Number are displayed from the Employer Organization record on the Employed Contact’s Phone and Address lists.

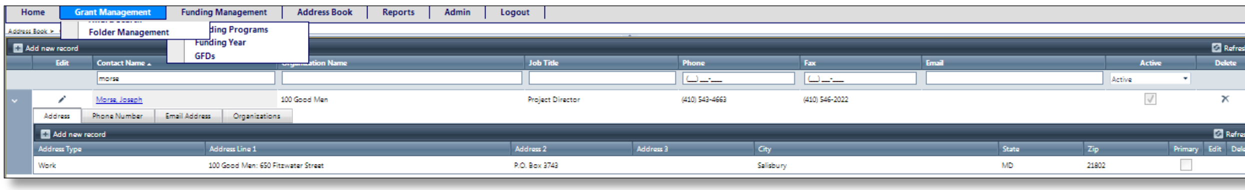


Figure 375 - Contact Record when Employer checkbox is checked

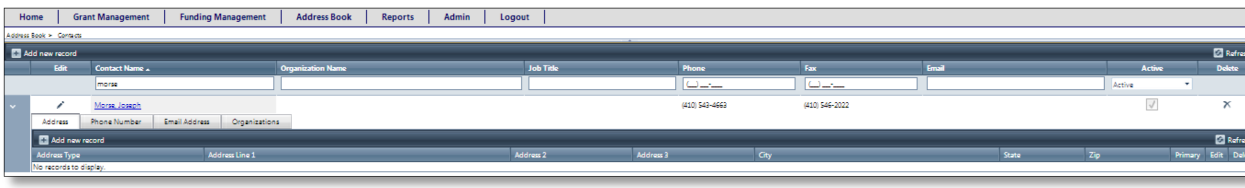


Figure 376 - Contact Record when Employer checkbox is not checked

1. Enter the date the contact started with the organization into the Start Date field, or select it by clicking on the calendar icon beside the field.
2. If the contact is no longer employed by the organization, enter a date into the End Date field.
3. Place a checkmark into the Active checkbox if this is the contact is currently associated with the organization.
4. Click on the checkmark in the lower right corner to save the new organization record.

8.3.4 Manage Digital Signatures for a Contact (Permission Required)

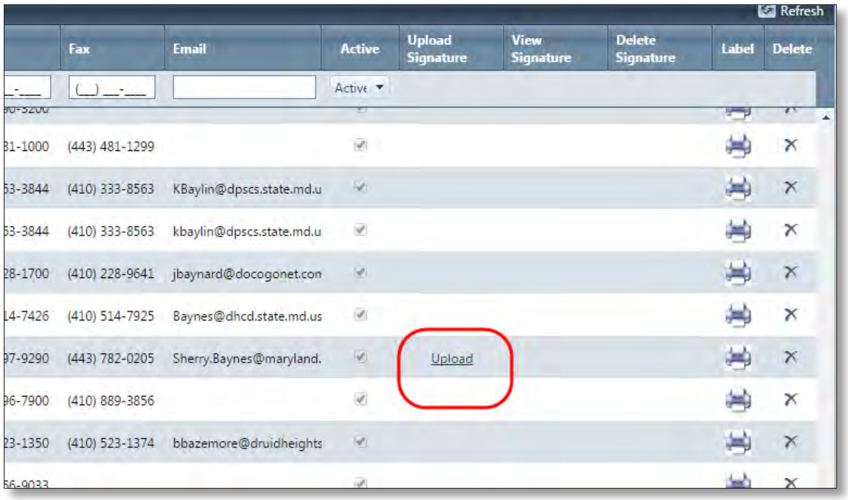
Admin role users can upload, view, and delete digital signature files which appear on system-generated reports.

- Signature files must be under 2Mb in size, and
- Must be of type PING (.png)

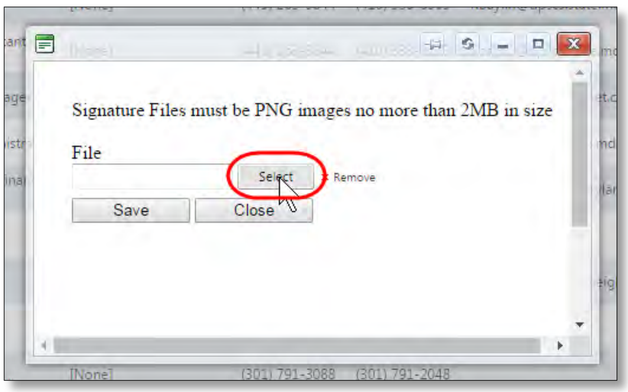
8.3.4.1 Uploading a Digital Signature File

If you have the permission to use a digital signature, you will see an Upload link in the **Upload Signature** column of the **Contacts** grid.

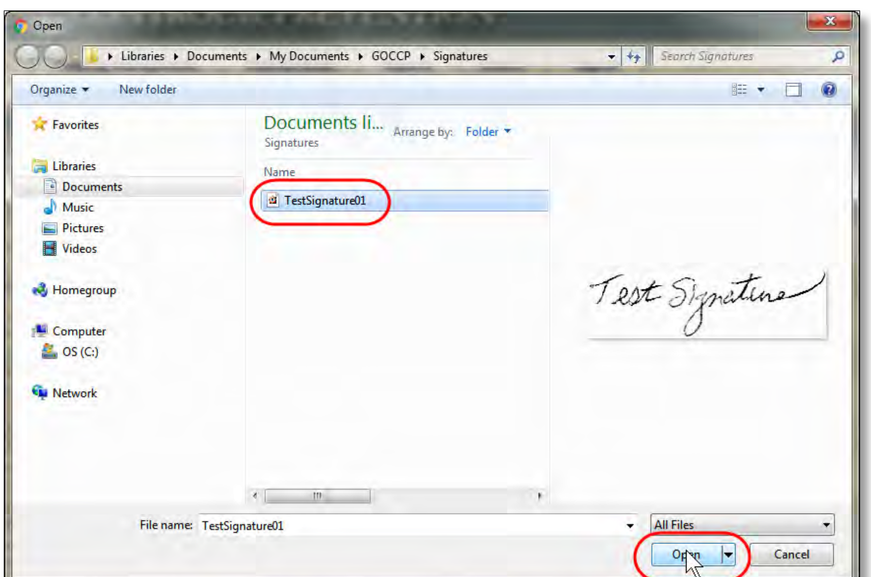
1. Click on the Upload link.



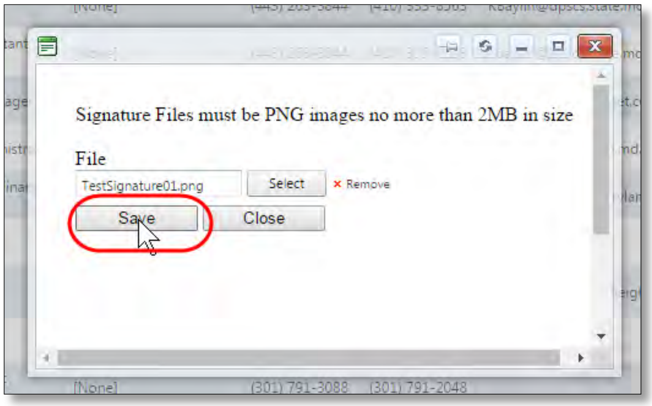
2. Click the **Select** button to view and select your Digital Signature File.



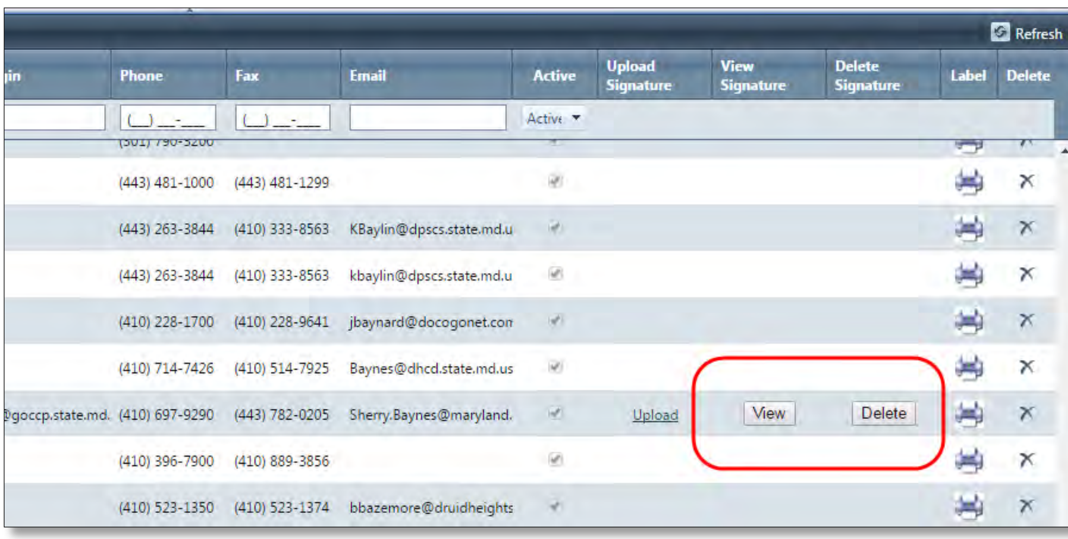
3. Click to select your file, then click the **Open** button.



4. When you've selected your file, click the **Save** button to save it in GMS.

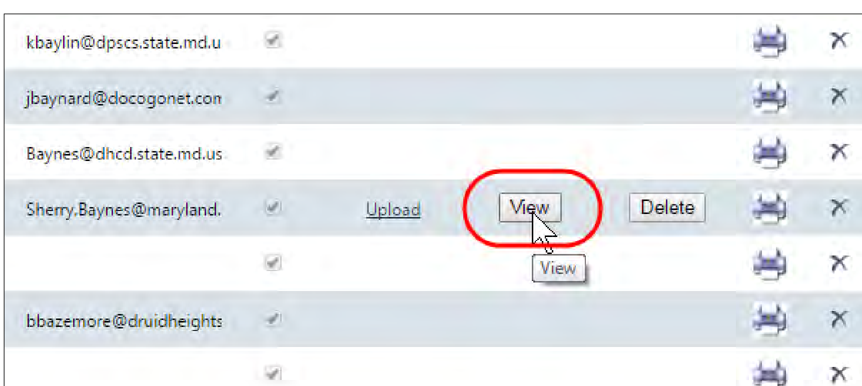


5. Once you've successfully uploaded your digital signature file, two new buttons appear in your row: the View button under the View Signature column heading, and a Delete button under the Delete Signature column heading. Use the View button to confirm your signature appears correctly, and the Delete button if you want to delete your signature.

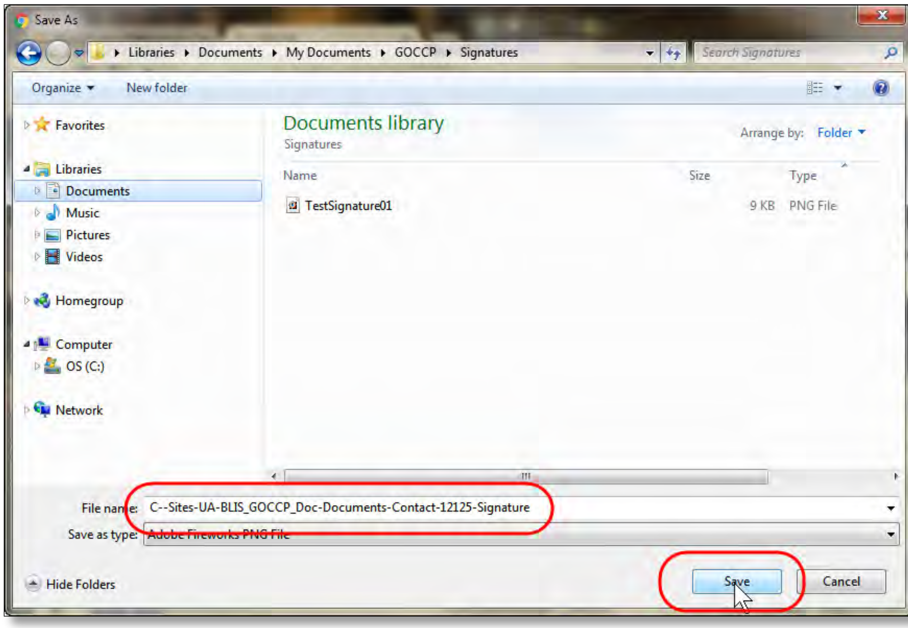


8.3.4.2 Viewing a Digital Signature File

1. Click on the View button in your row under the View Signature column heading.

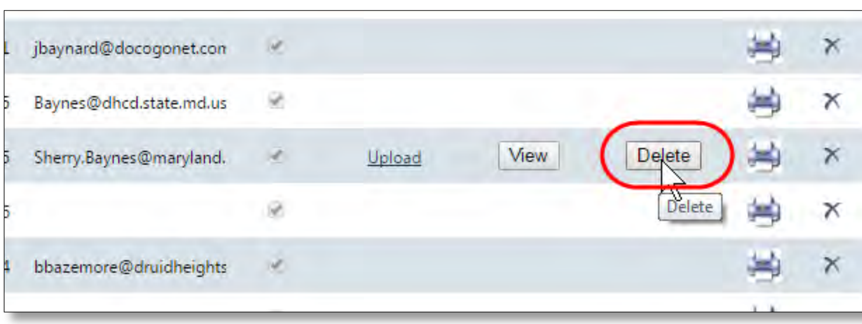


2. The system will assign the file a name (in the File name field); use that name or type in another instead, then click the **Save** button. When the file has been saved, use Explorer to navigate to the folder in which it was saved, then double-click on the file to view it.



8.3.4.3 *Deleting a Digital Signature File*

1. Click on the Delete button in your row under the Delete Signature column heading. Once you do this, the View and Delete buttons will no longer appear. Admins have the permission to delete an online digital signature file for any user.



8.3.5 Assigning the GOCCP Signatory Authority Role

Only one user (GOCCP only) can be assigned the GOCCP Signatory Authority Role. Upon using the following procedure to assign the role to a contact, the role is no longer assigned to the previous user it was assigned to. Upon assigning the role to a user, you will see that user's information when viewing the Signatory on the AO Award Packet (Letter Page 2) as follows:

1. First Name & Last Name
2. Job Title where the Company is the Prime Recipient
3. Signature File

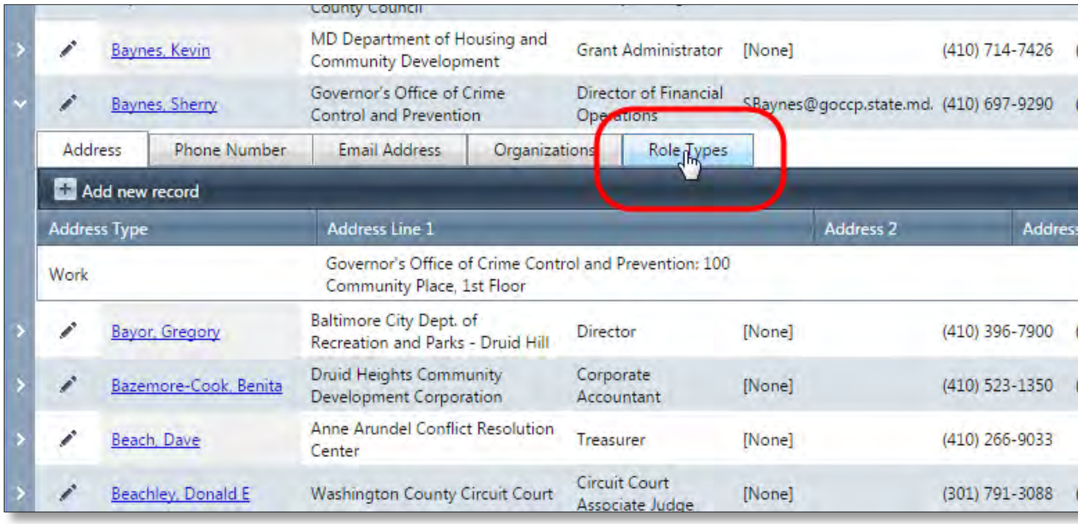
and the following information when viewing Page 3 of the AO Packet

1. Job Title where the Company is the Prime Recipient
2. Signature File

How to assign the GOCCP Signatory Authority Role:

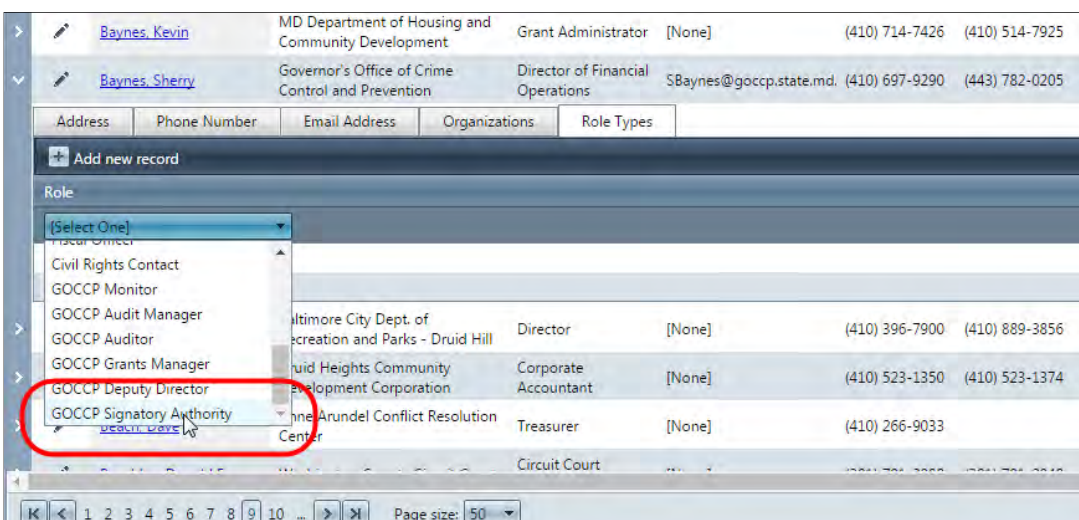
1. Go to **Address Book --> Contacts** and locate the contact you wish to assign the signatory role
2. Click the **Expand** icon to expand the contact's information

3. Click on the **Role Types** tab

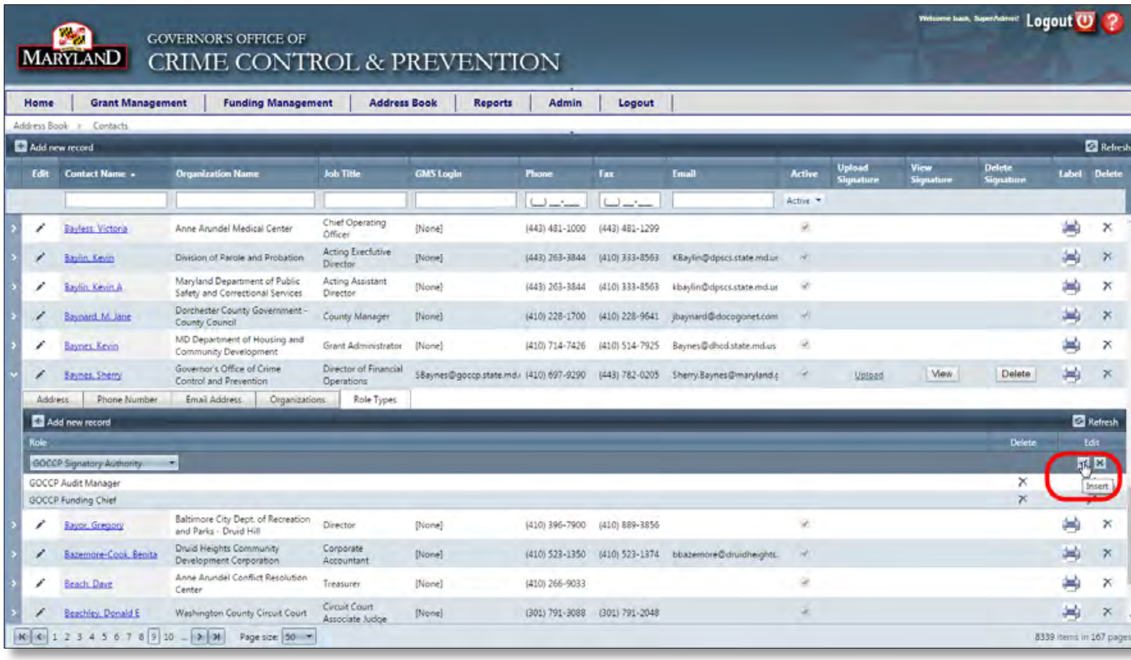


4. Click on the **Add new record** icon under the Address tab

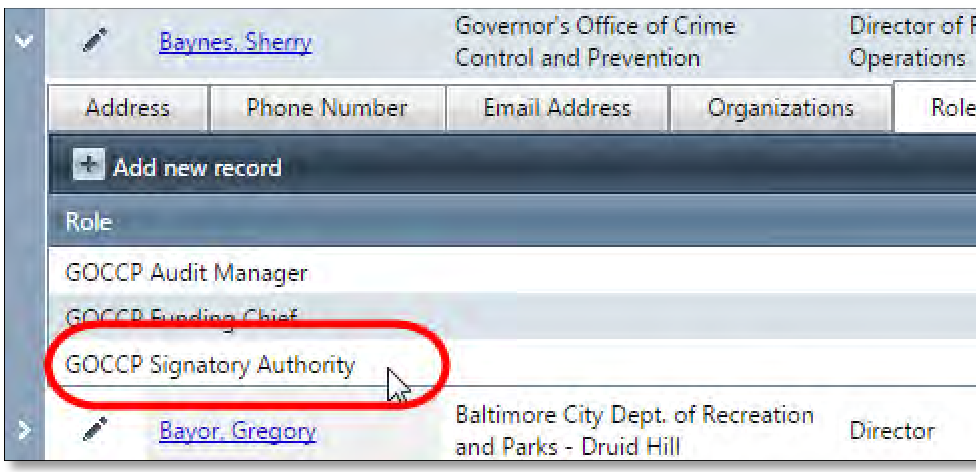
5. Click the **Role** drop-down menu and select **GOCCP Signatory Role**



6. Click on the **Insert** icon under the Edit heading to the far right



7. GOCCP Signatory Authority is now shown under the **Roles** tab for that contact

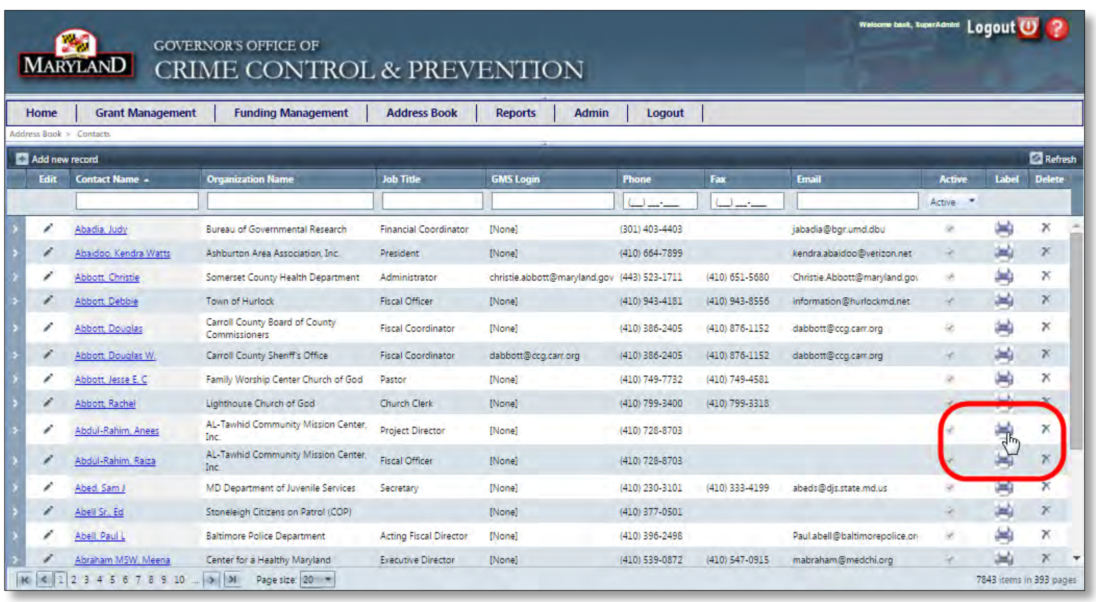


8.3.6 Print Contact Labels

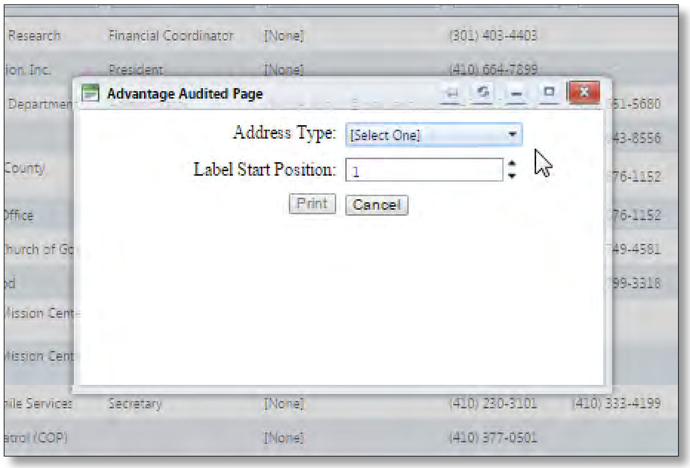
To expedite the process of sending correspondence, you can print a contact's mailing address on an Avery 5163-compatible mailing label sheet. These sheets contain 10 mailing labels, and you can control which label you want to print the contact's address on.

To print a mailing label for a contact:

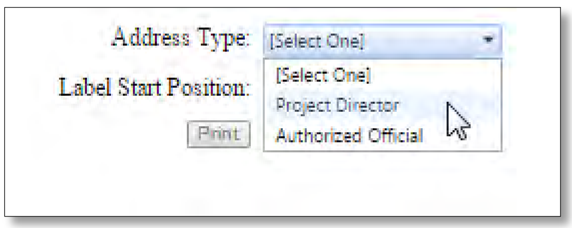
1. In the **Address Book -> Contacts** listing, click the printer icon in the **Label** column for the contact you wish to print:



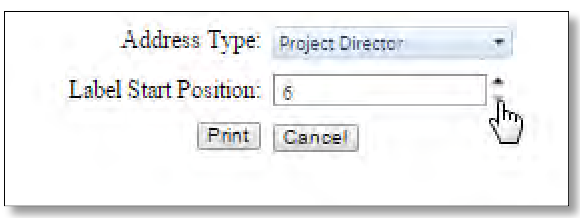
2. The print dialog box appears:



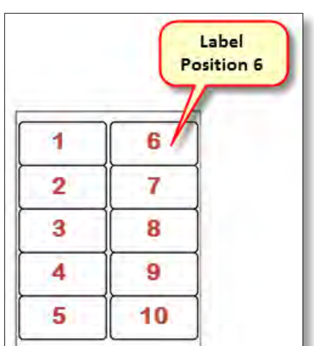
a. Click on the drop-down box arrow beside **Address Type** and click to select:



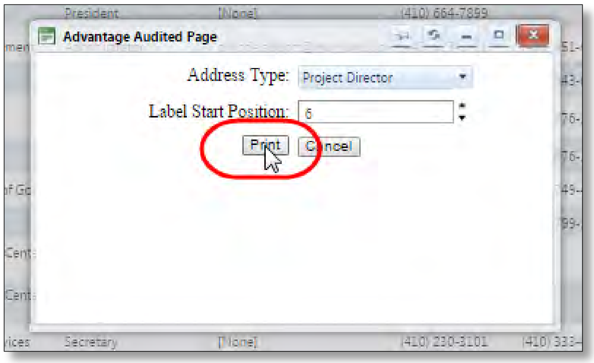
b. Next, select the Label Start Position by clicking on the up or down arrows:



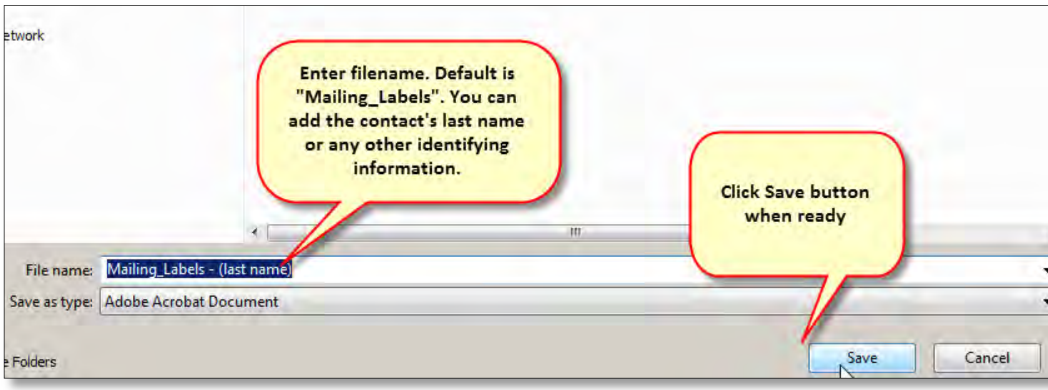
You can select where on the page you'd like the label to print. For example, if you select **Label Start Position 6**, your label will print on the label page as so:



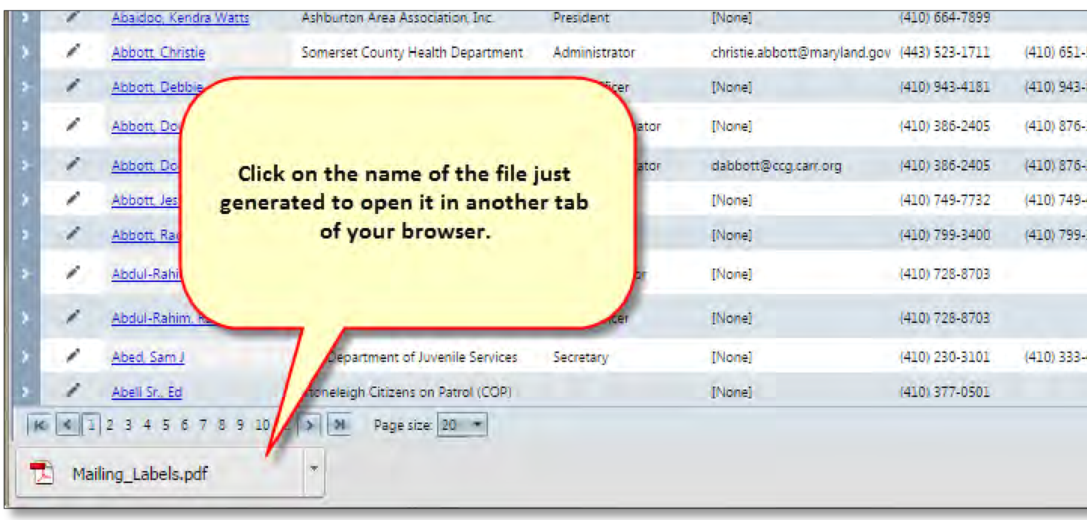
3. When you've selected the label position, click on the **Print** button:



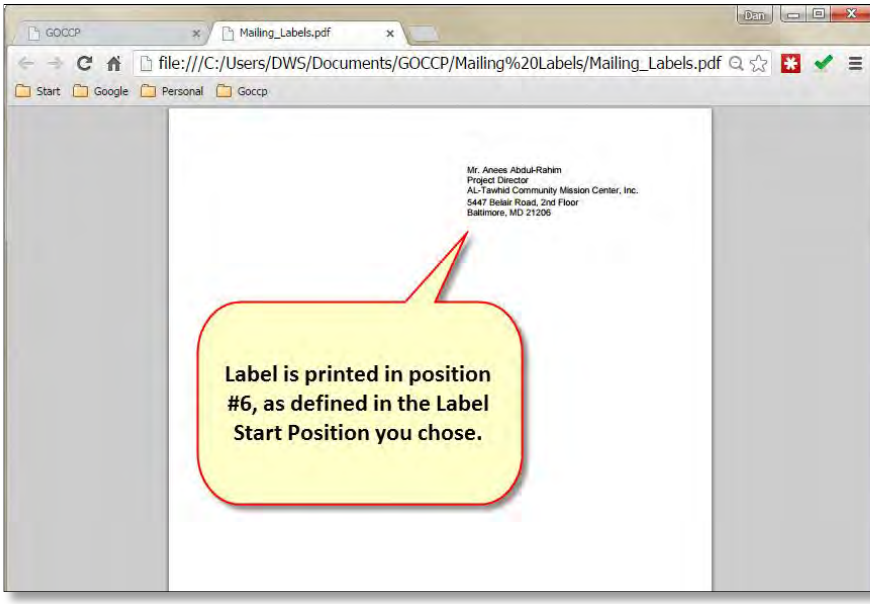
4. Type in the filename, then click the **Save** button.



5. Locate the file on your hard disk and click to open the PDF, or if your browser shows the file at the bottom, click on that to open the label report in a new tab:



6. From here you can print the sheet directly to your printer.



8.3.7 Delete a Contact

You can delete an existing Organization from the GMS Organizations database. *However, deleting an Organization should go through internal approvals as all the related Program, Grant and activity data of the Organization will also be deleted*.

1. Click on the X icon in the Edit column of the record you wish to delete.

Figure 377 - Delete a Contact

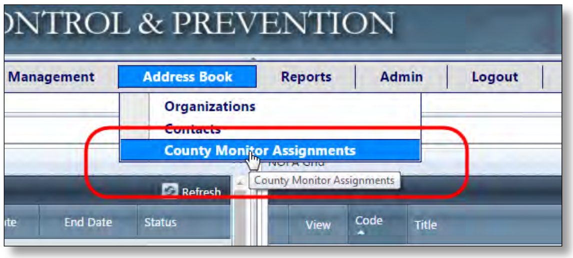
2. Click the OK button when the delete-confirmation dialog box appears. If you click the Cancel button, the contact will not be deleted.

Figure 378 - Confirm Deletion of Contact

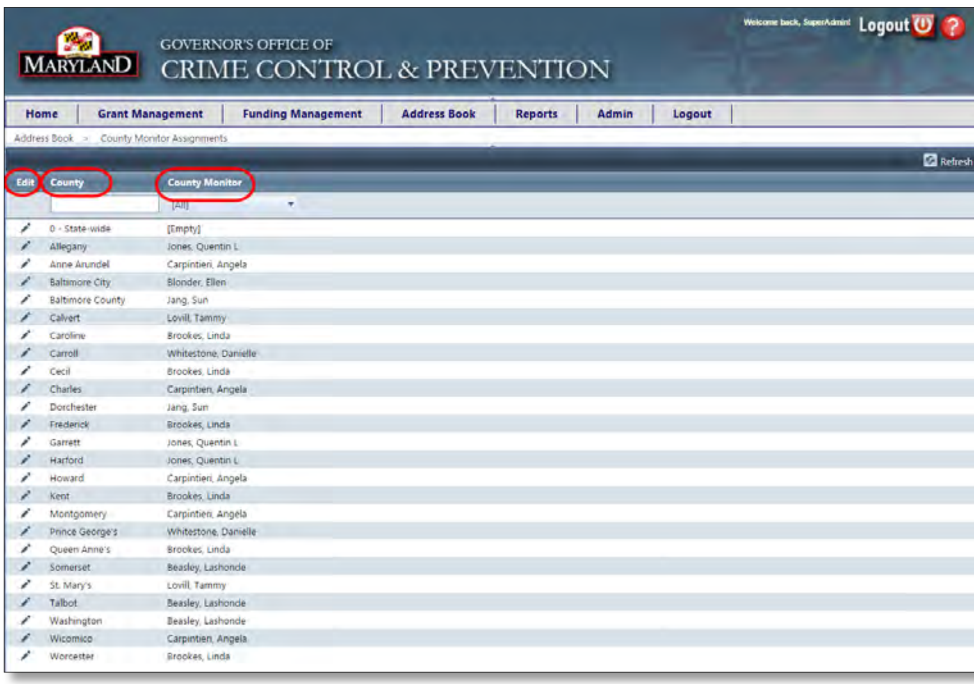
8.4 County Monitor Assignments (Permissions Allowing)

Each county in Maryland must be assigned a GOCCP employee as Monitor for the county. To assign a monitor to a county:

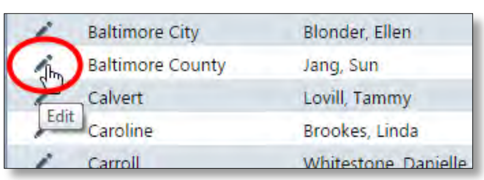
1. Click on Address Book, then select County Monitor Assignments.



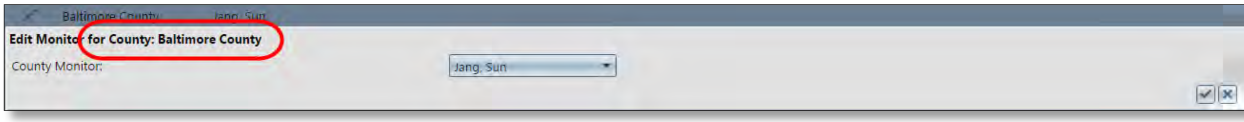
2. The County Monitor Assignments grid is displayed. There are three columns:
   a. The Edit column, which allows you to choose a monitor for a county
   b. The County column, which lists all counties
   c. The County Monitor column, which displays who the monitor is for the county



3. To change a monitor for a county, click on the pencil icon in the edit column for the county you wish to change monitors for.

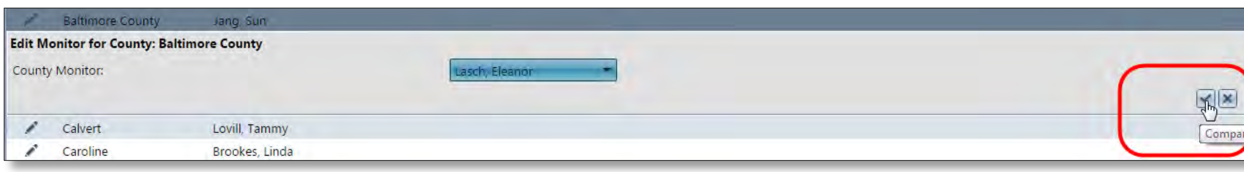


4. The edit screen appears for the county you selected.



5. Click the list of monitors and select the person you wish to be monitor for that county.

6. When you've made your selection, click the X icon to cancel or the checkmark icon to save your changes.



7. NOTE: All Maryland Counties are accounted for in the grid, so there is no "Add" functionality – you can only change who is the monitor for any given county.

9 Admin

GOCCP administrators and technical personnel use the tools provided in the Admin menu to control and configure GMS system-wide data and processes.

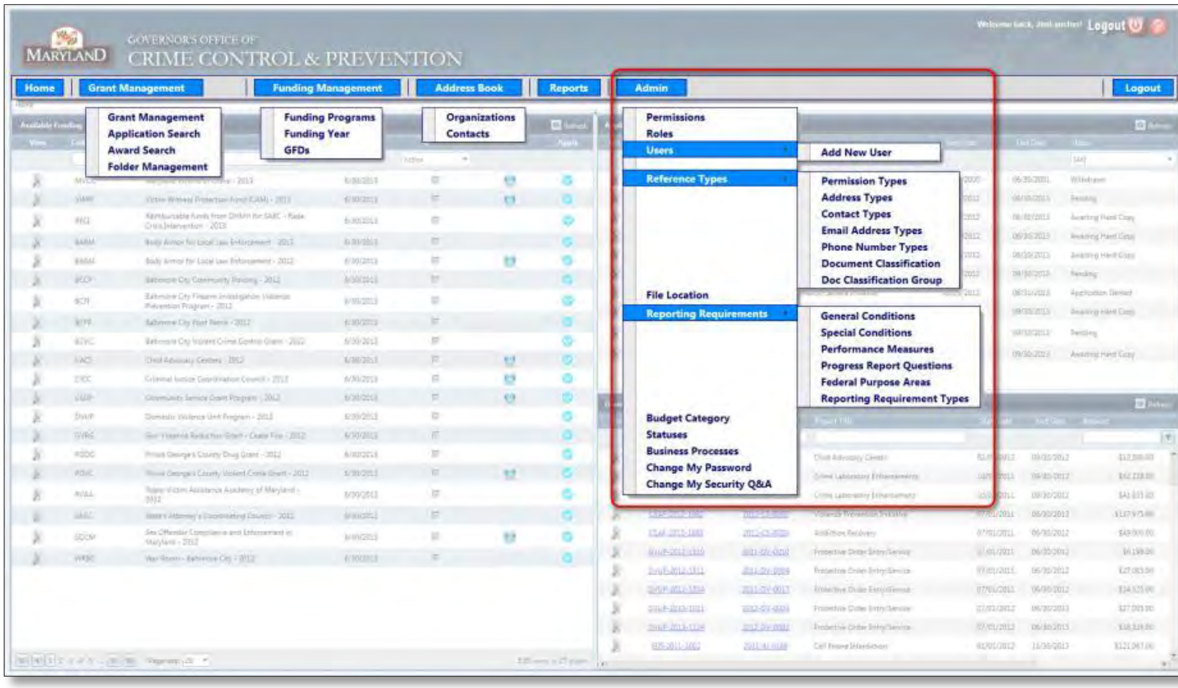


Figure 379 – GMS Admin Menu

GMS is a role-based system; users have access to system features like viewing screens, changing statuses, creating funding programs, and editing applications & awards based on what role is assigned to their user ID. All of the customizable information used to implement GMS businesses processes are defined in the Admin menu.

NOTE: The Business Process System (E&V) includes complex logic for dynamic processing of custom validation, events, and actions. Statuses, Flows, Events, Actions, etc. make up the Business Processing System. No changes should be made to any of those areas without the involvement of the development team to ensure dependencies are not broken and processing logic is maintained.

9.1 Admin Screens Illustration

This illustration demonstrates the following GMS screens:

6. Admin -> Users
7. Admin -> Roles
8. Admin -> Permissions
9. Admin -> Business Processes
10. Admin -> Statuses

To illustrate how information defined in the various Admin screens combine to define processes in GMS, consider the Grant Application process. After an application is initially created, it progresses through various statuses like Submitted, Pending, and Internal Review. Sometimes the application status changes after the applicant takes action, like submitting or cancelling the application. Other times the application status will change when a GOCCP user takes action, like receiving the hardcopy or beginning an internal review of the application. Eventually the application is either denied or awarded as a grant and its status is changed accordingly.

1. In this illustration, there are several **Users** involved, including the applicant and the GOCCP user. Those users have been assigned **Roles** (the applicant could be assigned the role *External User*, the GOCCP user may be assigned the roles of *Internal Staff* and *Regional Monitor*. Users are set up in GMS in the ***Admin -> Users*** screen.

Figure 380 - Admin -> Users Screen

2. The GOCCP user has permission to view, edit, and change the status of the application because their User ID has the *Internal Staff* role assigned to it, and that role has been defined with those permissions. Roles are set up in GMS in the ***Admin -> Roles*** screen.

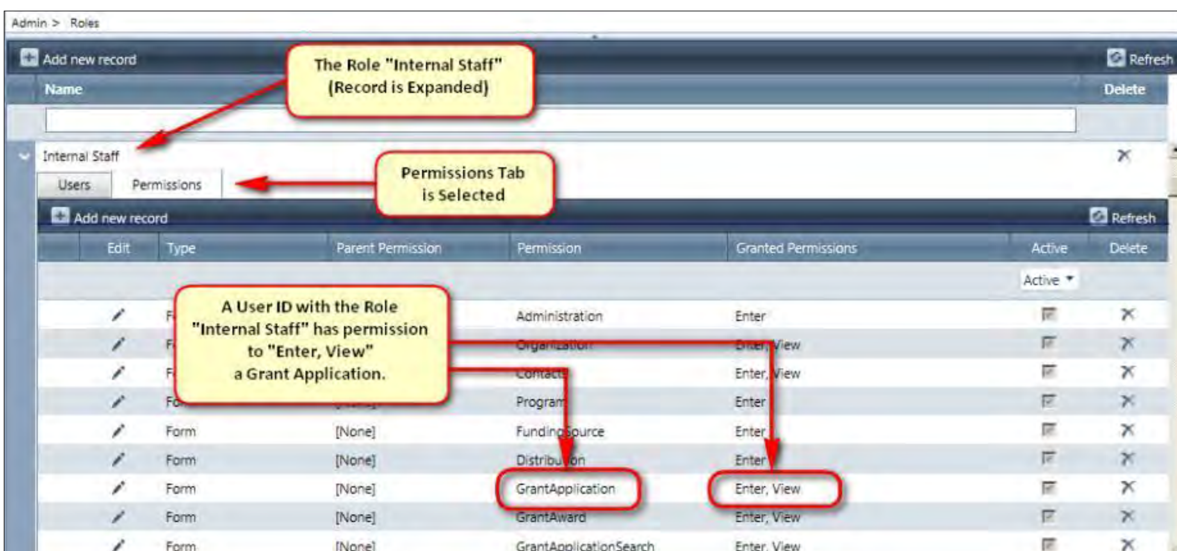


Figure 381 - Admin -> Roles Screen

3. Because the applicants User ID has been assigned the Role of External User, they have **Permission** to access the Grant Menu screens as well as to change the status of the application to Submitted or another status like Withdrawn. Similarly, because the GOCCP User ID has been assigned the Role of Internal Staff, they have the permission to view and edit the Grant

Application as well as to change its Status to Hardcopy Received, Internal Review, Awarded, or another status. Permissions are defined in the ***Admin -> Permissions*** screen.

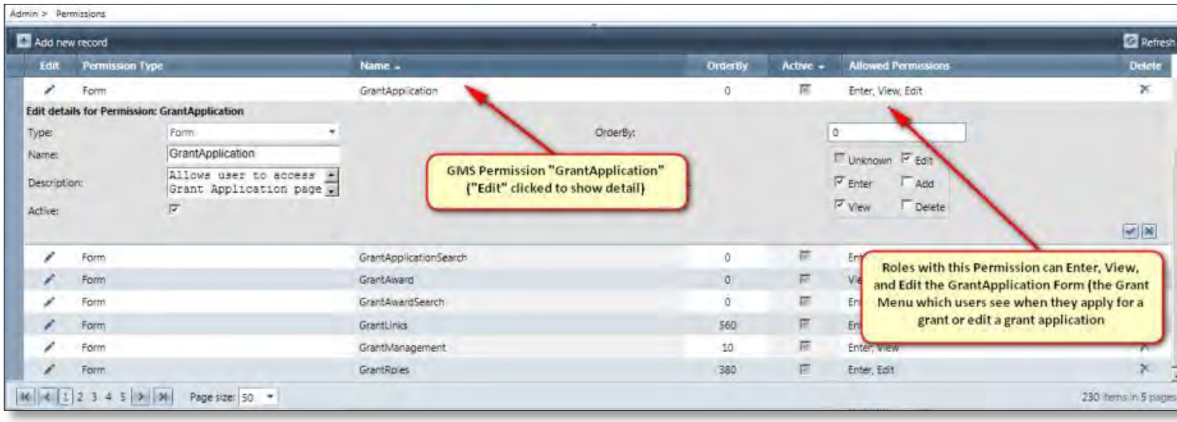


Figure 382 - Admin -> Permissions Screen (Permission to access a GMS Screen)

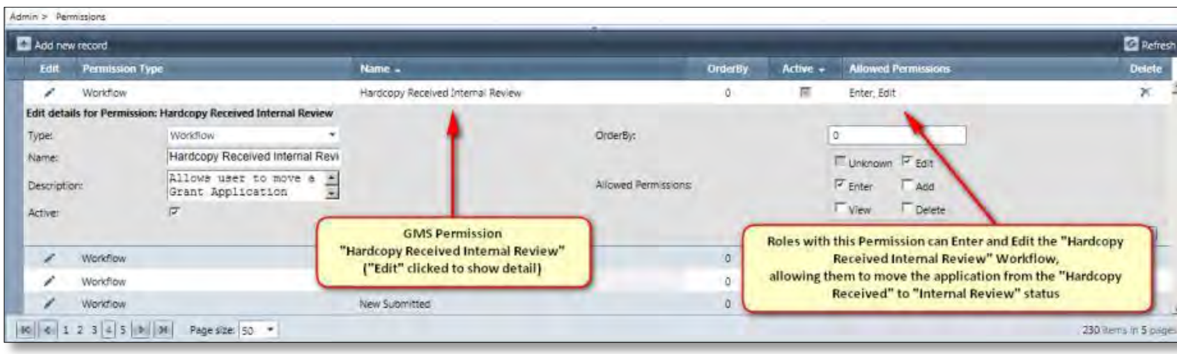


Figure 383 - Admin -> Permissions Screen (Permission to change an Application Status)

4. The action of moving a grant application from one status to the next – in this case from *Hardcopy Received* to *Internal Review* – is called a Workflow in GMS. In a larger context, the entire Grant Application process is called a **Business Process** in GMS.

Figure 384 - Admin -> Business Processes Screen

- Business processes contain many workflows; the Hardcopy Received workflow is expanded and contains one record for each status that the application could be moved to from Hardcopy Received. For this illustration, the relevant record can be found under the *Grant Application* Business Process, the *Hardcopy Received* Workflow, and the *Begin Internal Review* process.

5. In order for Statuses to be available for creating workflows in Business Processes (and anywhere else within GMS) they must be defined in the ***Admin -> Statuses*** screen.

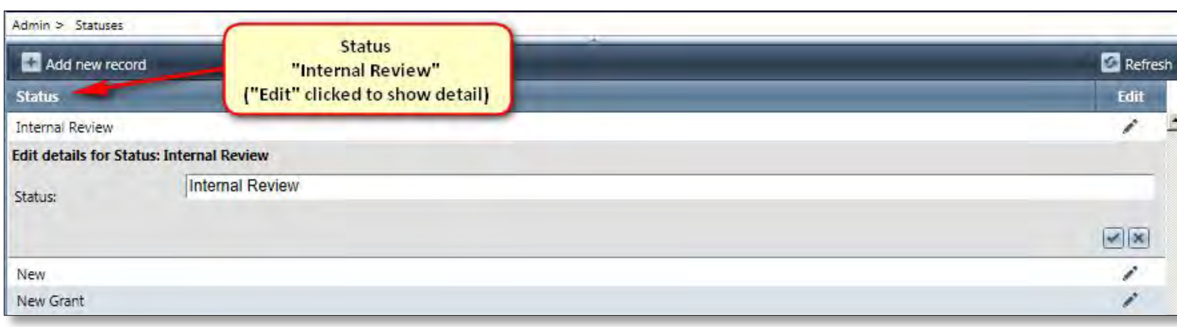


Figure 385 - Admin -> Statuses

9.2 Working with Narrative Sections

When creating a GFD a GOCCP user assigns one or more Narrative Sections that a grant applicant must complete in order to submit an application. The figure below shows that process – the GOCCP user selects a narrative from the **Available Sections** pane and drags it to the **Assigned Sections** pane.

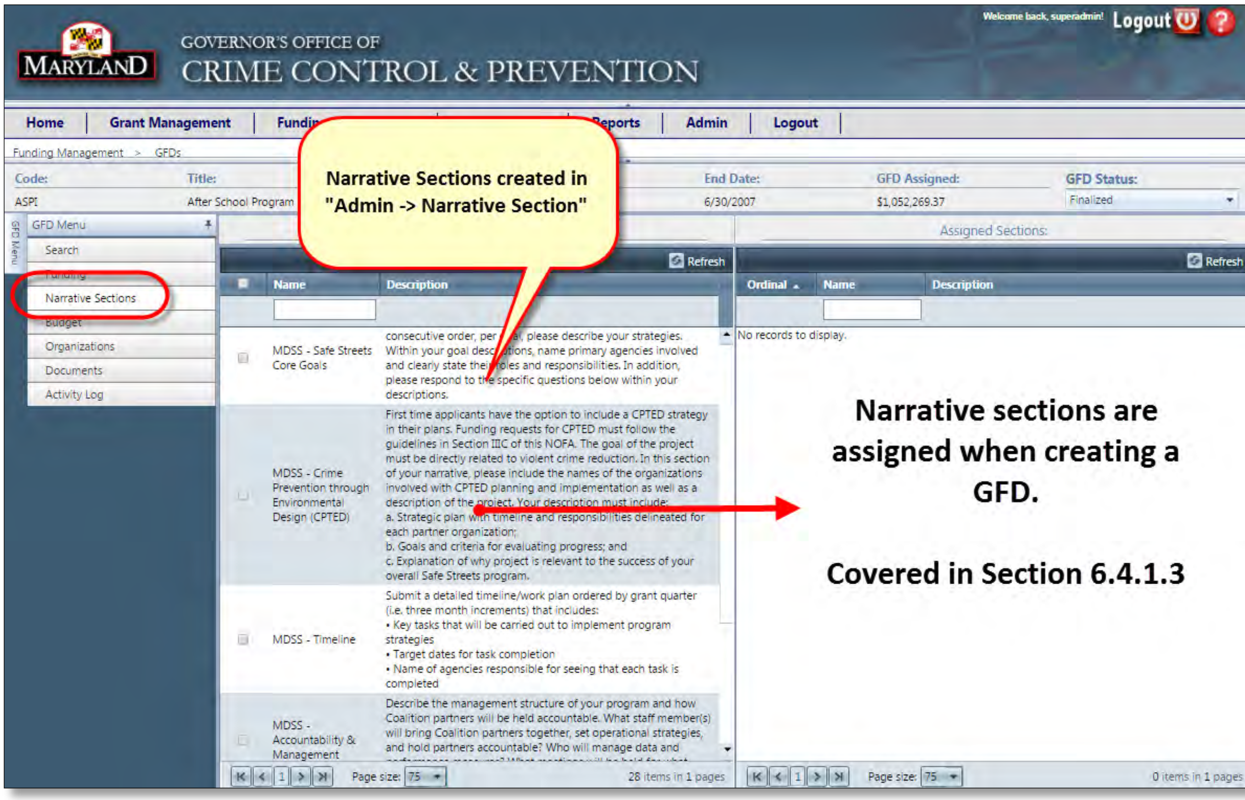


Figure 386 – GFD – Assigning Narrative Sections to Grants based on GFDs.

This procedure describes how to access, create, edit, delete, and filter Narrative Sections from the Admin menu.

9.2.1 Access Narrative Sections

1. Click on **Admin**, then select **Narrative Section**.

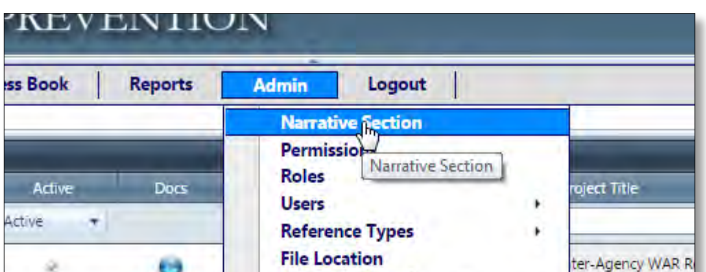


Figure 387 – Admin -> Narrative Section.

2. The Narrative **Sections** screen is displayed.

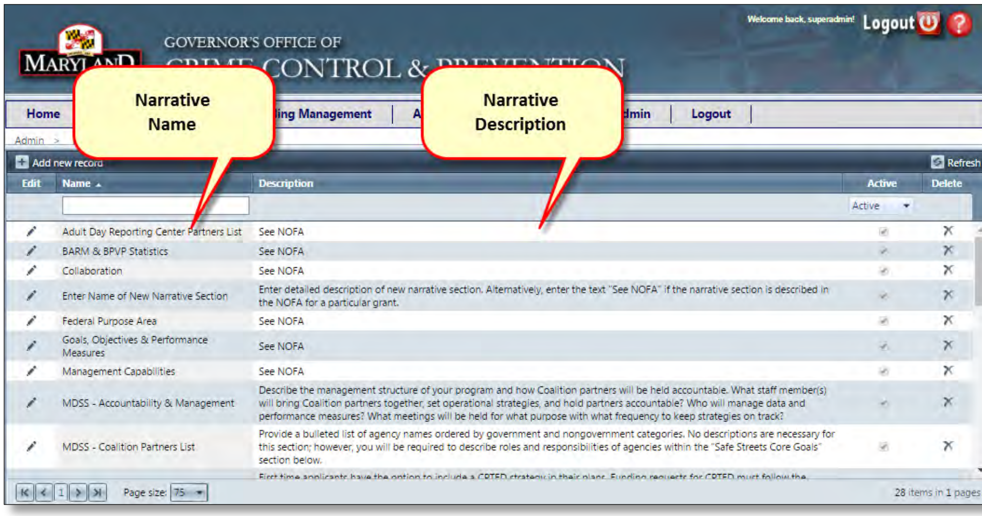


Figure 388 – Narrative Names and Descriptions

9.2.2 Add a New Narrative Section

1. Click on the **Add new record** icon.

Figure 389 – Adding a New Narrative Section

2. The **New Record** screen appears. Enter the required information described below.

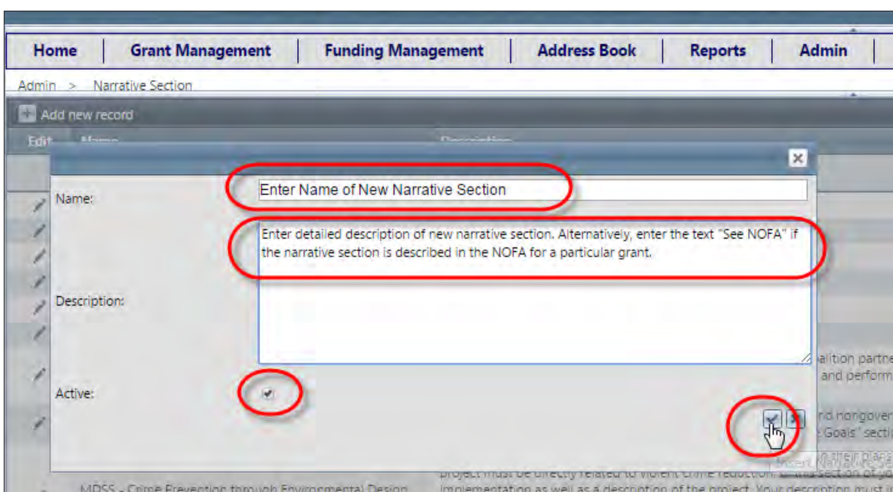


Figure 390 – Adding Information into a new Narrative Section.

a. Name: Enter a descriptive name in the **Name** field.

b. Enter a detailed description in the **Description** field. If the narrative is described in the NOFA, enter "See NOFA" in this field.
c. To make the narrative active, click to place a check in the **Active** checkbox.
d. When all fields are complete, click the checkmark icon in the lower-right corner to save the narrative section.

3. The newly added narrative section is displayed in the list.

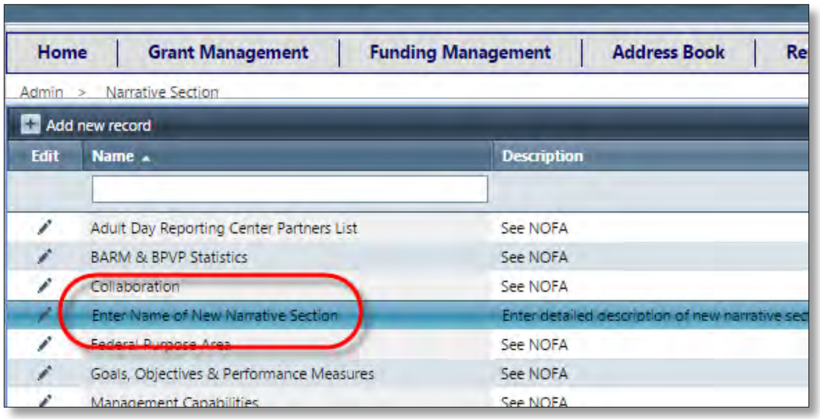


Figure 391 – Newly Added Narrative Section is displayed in list.

9.2.3 Delete a Narrative Section

1. To delete a Narrative Section, click on the X in the **Delete** column for the section you wish to delete.

Figure 392 – Click X to delete a Narrative Sections

2. Click the **OK** button on the **Delete this Narrative Section Item?** dialog box.

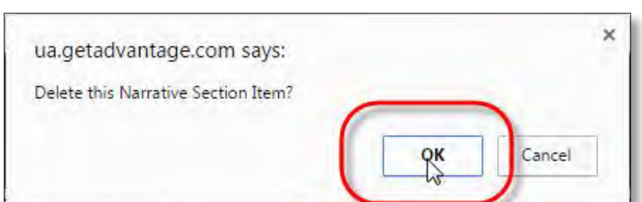


Figure 393 – Click OK to confirm deletion.

9.2.4 Edit a Narrative Section

1. To edit an existing Narrative Section, click the pencil icon in the **Edit** column beside the section you wish to edit.

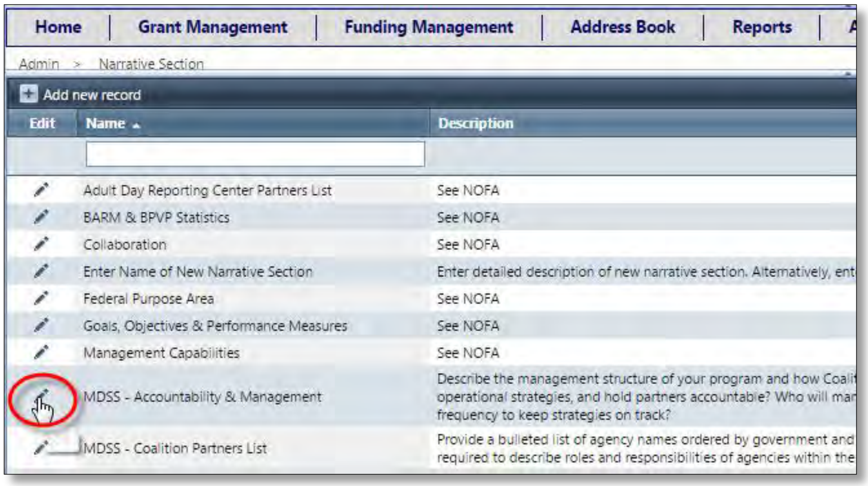


Figure 394 – Click the pencil icon to edit a Narrative Section

2. The **Edit Details** screen is displayed for the selected Narrative Section. Edit the details as described in Section 9.2.2, and click the checkmark icon in the lower-right corner when complete.

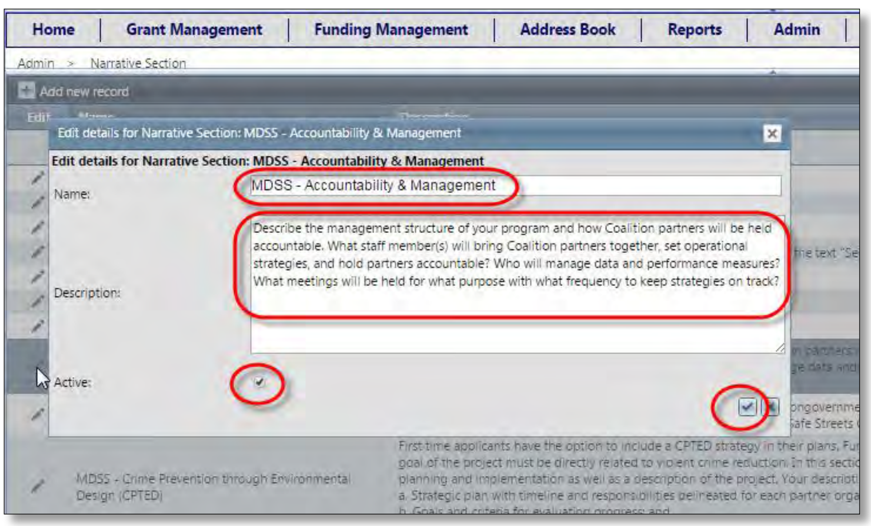


Figure 395 – Complete Narrative Sections and Click Checkmark in Lower-Right Corner

9.2.5 Filter Narrative Sections by Active/Inactive/All

You can easily filter the Narrative Sections to see all of them, or only those that are active or inactive.

1. From the Narrative Sections screen, click the **Active** arrow directly under the **Active** column heading.

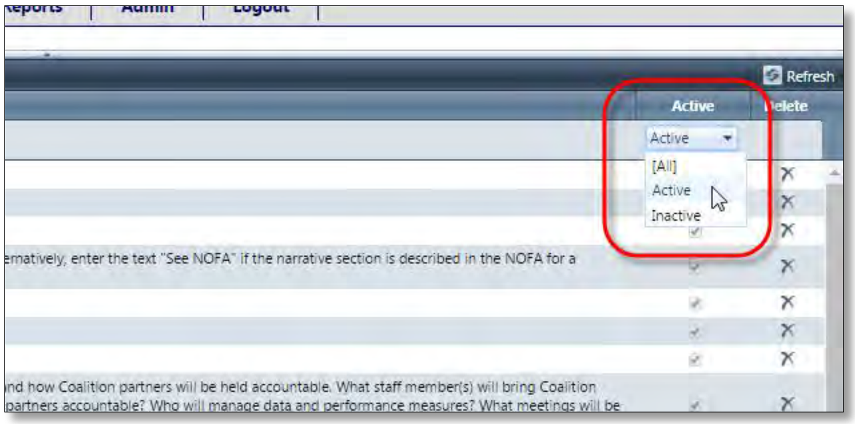


Figure 396 – Click the Active menu to view Narrative Sections in different states of activity.

   a. From the pull-down menu, select **All** to view all Narrative Sections.
   b. From the pull-down menu, select **Active** to view only those that are currently active.
   c. From the pull-down menu, select **Inactive** to view only those that are currently inactive.

9.2.6 Filtering Narrative Sections by Name

If you are searching for a specific Narrative Section, use the **Name** filter box to narrow down sections that are shown.

1. For example, if you know the Narrative Section you are searching for is one in the group that begins with "MDSS", enter MDSS in the **Name** box directly below the **Name** column. When you've entered the text, press the **Enter** key.

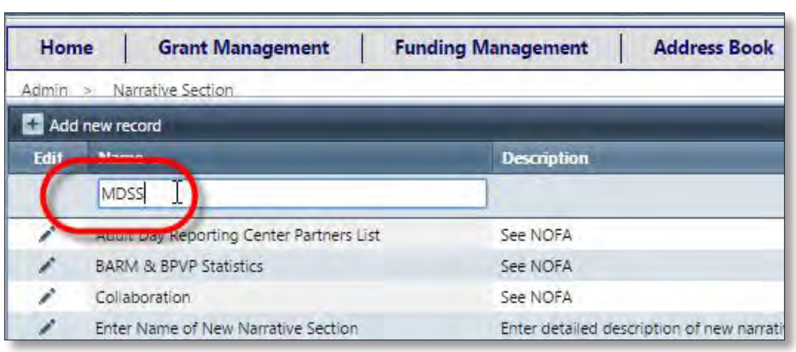


Figure 397 – Enter Search/Filter Text into the blank field directly under the Name column.

2. For every Narrative Section returned, the text "MDSS" is in the **Name**.

Figure 398 – Notice that search terms are contained in every name of a Narrative Section displayed.

3. **REMEMBER**: To view all Narrative Sections after performing a filter, you must clear the filter. First clear the type out of the **Name** field, then press the **Enter** key.

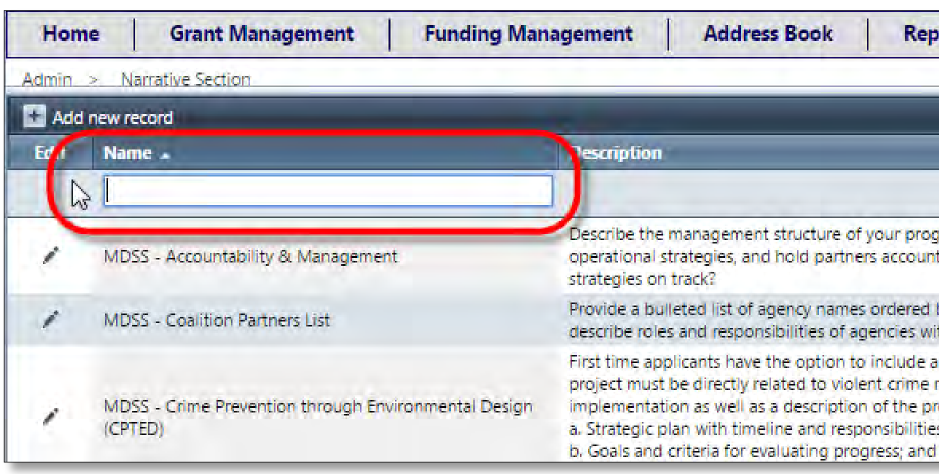


Figure 399 – Clear the Name field and press Enter to reset filter.

4. All Narrative Sections are now displayed again.

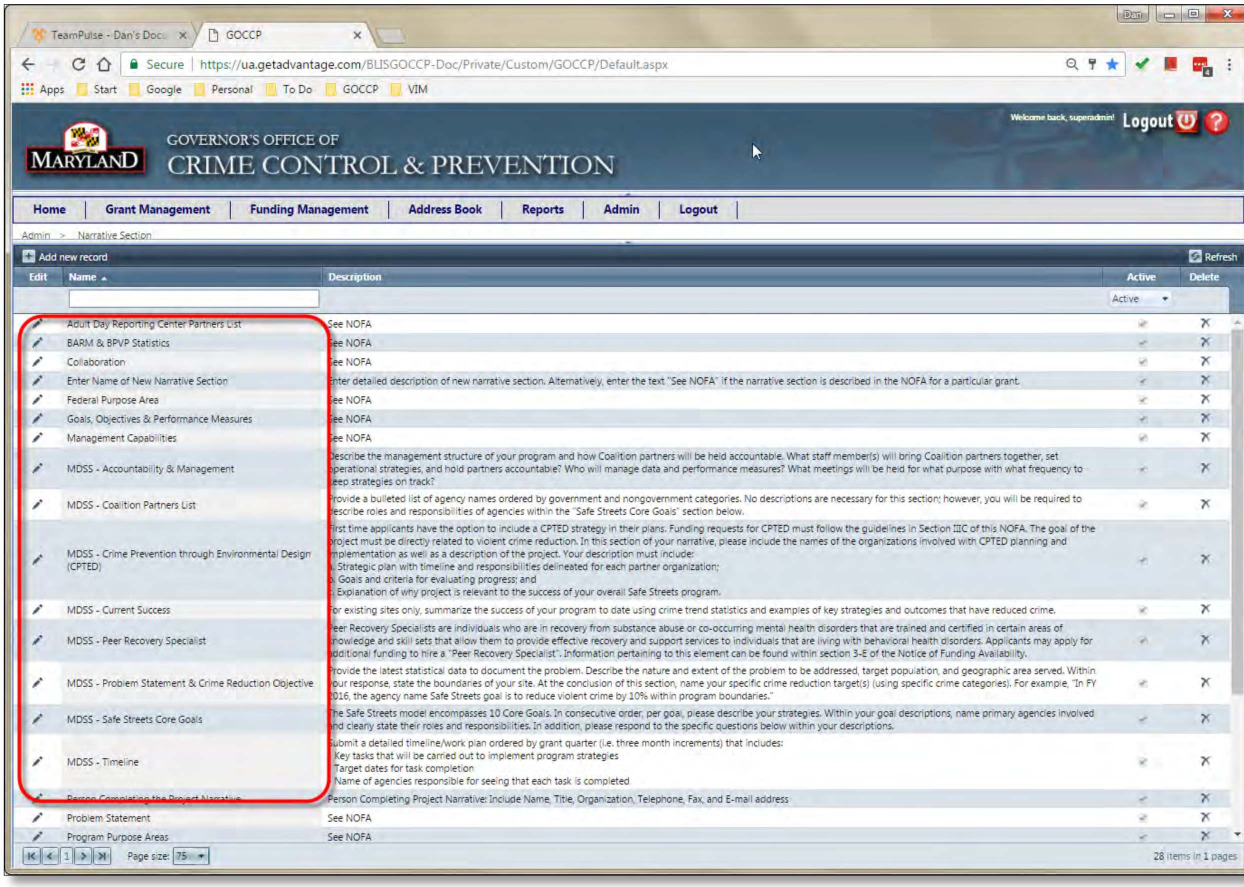


Figure 400 – With the filter cleared, all Narrative Section are displayed again.

9.3 Add a New GMS User

Create new GMS user by accessing the Add New User screen (Click Admin -> Users -> Add New User). Note that the new user can log into the system, but in order for them to apply for a grant or view any organizations' applications or awards, they must be associated with a Contact and an Organization.

9.3.1 Add new GMS Login

1. Access Users -> Add New User from the Admin menu.

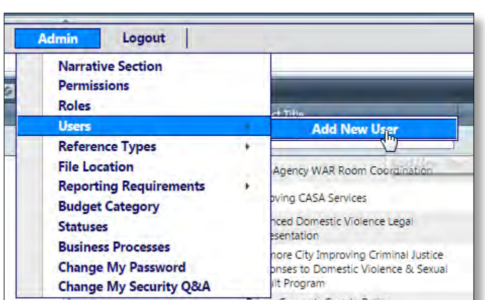


Figure 401 - Admin -> Users -> Add New User

2. Enter the new users information.

Figure 402 - Enter New User Information

3. Click the Create User button in the lower right corner of the window.

9.3.2 Associate New GMS Login with a GMS Contact

1. Access the Contacts database by selecting Contacts from the Address Book menu:

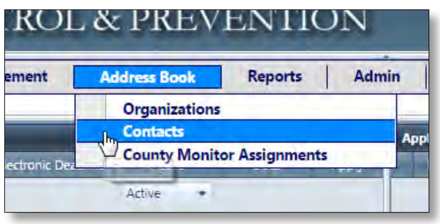


Figure 403 - Access Address Book -> Contacts

2. Click Add new record

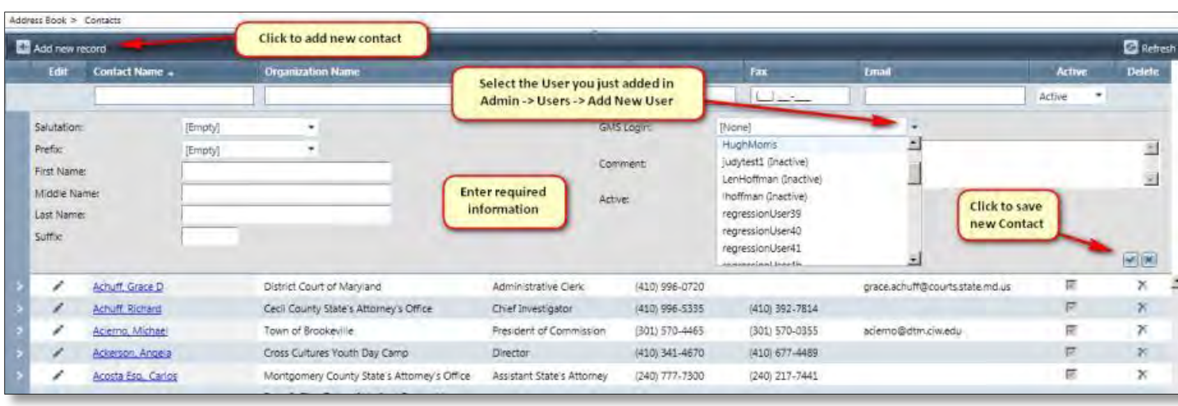


Figure 404 - Add New Contact Record and Select GMS User ID

3. Enter required information, associate the new contact with the new GMS user you added by selecting their User ID from the drop-down list, and click the Save icon.

9.3.3 Associate New Contact with a GMS Organization

1. Locate the contact you just added, and click the Expand icon next to the record to display the data tabs beneath it.

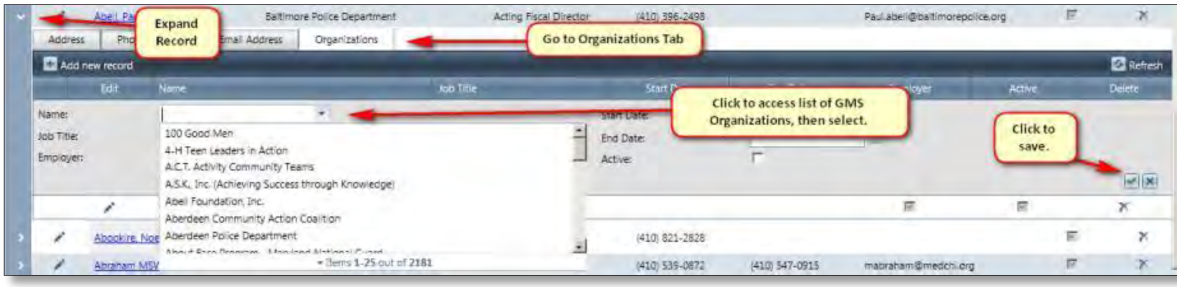


Figure 405 - Add an Organization to a Contact

2. Click on the Organizations tab if it is not currently highlighted and active.
3. Click the Add New Record icon directly beneath the Organizations tab for the expanded contact record.
4. Click on the Name drop-down list to display a listing of all the organizations in the GMS Organizations database that are available to you. If you know the organization name, you can begin typing it to find it in the list. When you find the correct organization, click on it to select it.
5. If the organization is the contact's employer, enter the contact's job title into that field and place a checkmark in the Employer box.
6. Enter the date the contact started with the organization into the Start Date field, or select it by clicking on the calendar icon beside the field.
7. If the contact is no longer employed by the organization, enter a date into the End Date field.
8. Place a checkmark into the Active checkbox if this is the contact is currently associated with the organization.
9. Click on the checkmark in the lower right corner to save the new organization record.

With these three steps complete, the new user will have permission to apply for a grant and will see the associated organizations' applications and awards in their home page dashboards.

9.4 Reference Types

Reference types are labels for categories of values that a particular object could potentially have. For example, if the object is a Phone Number, the reference types could be Home, Work, Cell, etc. In GMS, reference types are normally selected from a drop-down list. Using phone number as an example, when adding a phone number to a GMS Contact, you will be required to select a Phone Number Type from the drop-down list:

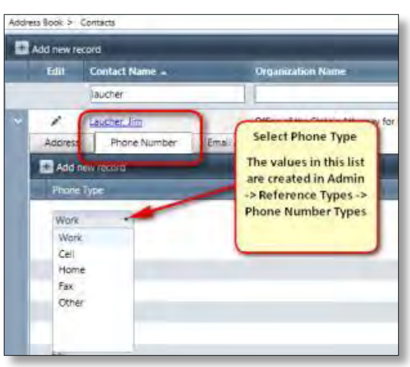


Figure 406 - Selecting a Reference Type from a Drop-down List

1. To add a new Phone Number Reference Type, go to Admin -> Reference Types -> Phone Number Types and click.

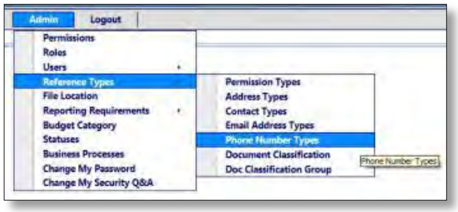


Figure 407 - Access Admin -> Reference Types -> Phone Number Types

2. Click the Add New Record icon, and enter the new type name.

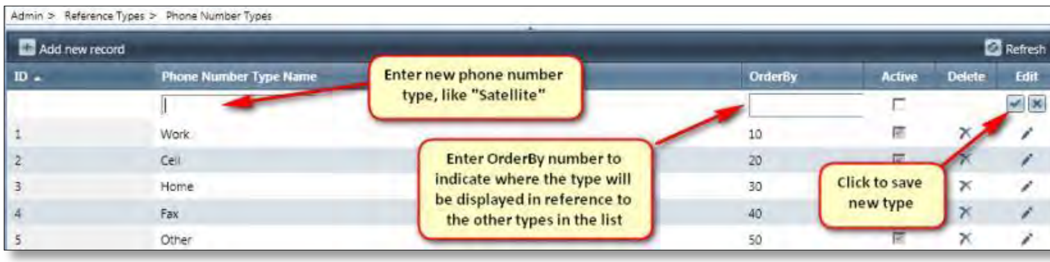


Figure 408 - Add New Phone Number Reference Type

3. Enter a number in the OrderBy field. This number will indicate where the new type will be displayed in reference to the other values in a drop-down list. For example, in Figure 304, if you entered "25" into the OrderBy field for the new value type, it would be displayed after Cell and before Home in a drop-down list.

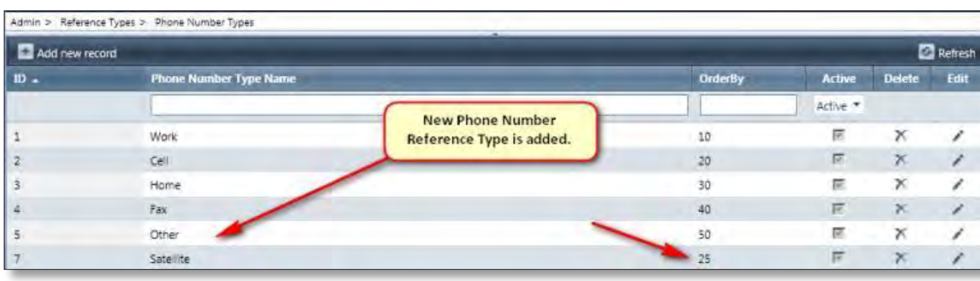


Figure 409 - New Reference Type Shown

4. To verify the new reference type has been added correctly and appears where it should in a drop-down list, access the Address Book -> Contacts screen, expand a contact, select the Phone Numbers tab, click to Add New Record, then click the Phone Type drop-down list.

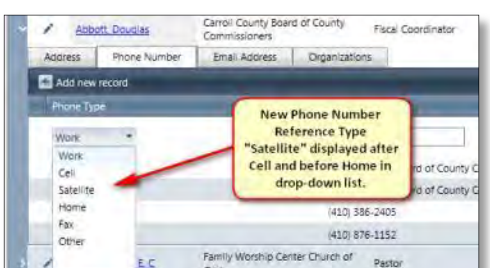


Figure 410 - Confirm New Reference Type Appears Correctly in Drop-down List

Follow the above procedure for adding other Reference Types.

9.5 File Location

The values in this list represent the locations where physical folders containing grant-related information reside. To add a new File Location:

1. Access Admin -> File Location

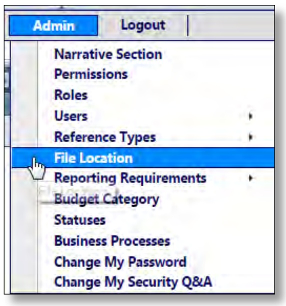


Figure 411 - Admin -> File Location

2. Click Add New Record, enter new location into the File Location text field.

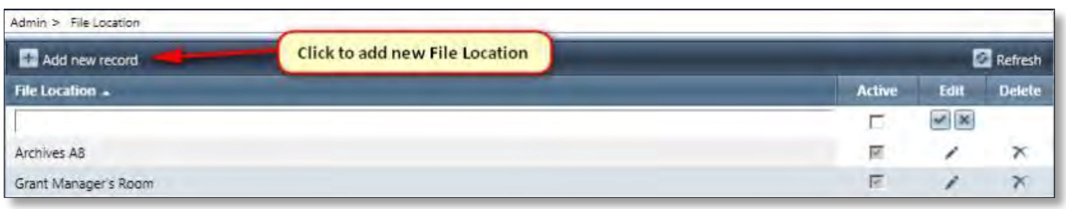


Figure 412 - Add New File Location

3. Place a checkmark in the Active checkbox if you want the location to appear as active, then click the checkmark icon under Edit to save the new record.

9.6 Reporting Requirements

Reporting requirements are categories of information that are required by sub-recipients on a regular basis to maintain compliance with the terms of a grant award. When awarding a grant, you can specify which categories of reporting requirements, and which measures or questions within the categories that will be required of the sub-recipient:

Figure 413 - Reporting Requirements Assigned to a Grant Award

In the Grant Menu and Award screen shown in Figure 309, the reporting requirement categories are shown in the menu down the left-hand side. Special Conditions is currently selected, so all of the special conditions that were added in Admin -> Reporting Requirements -> Special Conditions are displayed in the Available Special Conditions panel. By dragging a requirement from the Available panel to the Selected panel, that requirement is assigned to the current grant award. This works the same way for all of the reporting requirement categories:

Federal Purpose Areas	Defined Federal Program definitions that would be used to align a Grant Application and Award with Federal funding.
Performance Measures	The set of metrics that should be used to measure the implementation, effectiveness and success of a to be awarded or awarded Grant.
Progress Report Questions	Set of Questions whose answers represent a report of work accomplished during a specific time period.
Special Conditions	Set of rules and regulations that are specific to the funding source, funding year, and/or sub-award.
General Conditions	Rules and regulations for all sub-recipients regardless of funding source.

NOTE: The Reporting Requirements sub-menu has one item in addition to the requirement categories – the Reporting Requirement Types item. Use this to add a new category of requirement as follows:

1. Access Admin -> Reporting Requirements -> Reporting Requirement Types
2. Click Add New Record, enter new location into the File Location text field.

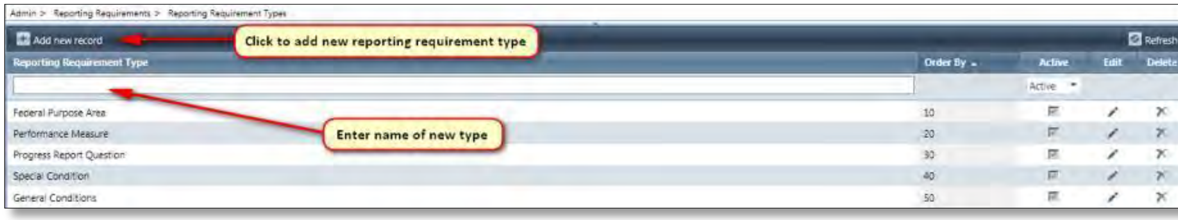


Figure 414 - Add New Requirement Reporting Type

3. Place a checkmark in the Active checkbox if you want the type to appear as active.
4. Enter a number in the OrderBy field. This number will indicate where the new type will be displayed in reference to the other types in the grant award screen.
5. Click the checkmark icon under Edit to save the new record.

9.6.1 Manage Reporting Requirements

You can manage the Reporting Requirement Types and items of each type via the Admin -> Reporting Requirements menu. General Conditions will be used in this example; all reporting requirements are added in the same manner.

1. Access Admin -> Reporting Requirements and select General Conditions from the sub-menu.

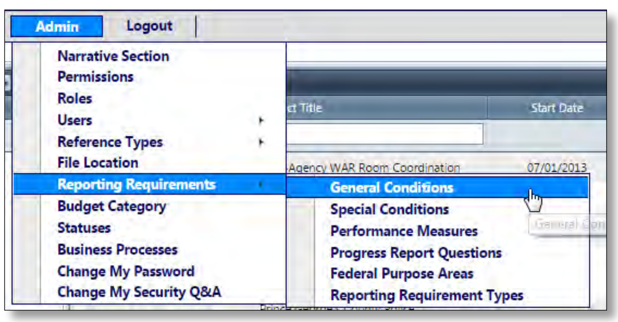


Figure 415 - Admin -> Reporting Requirements -> General Conditions

2. Enter a short description and long description, and click the checkmark in the lower-right corner to save the record.

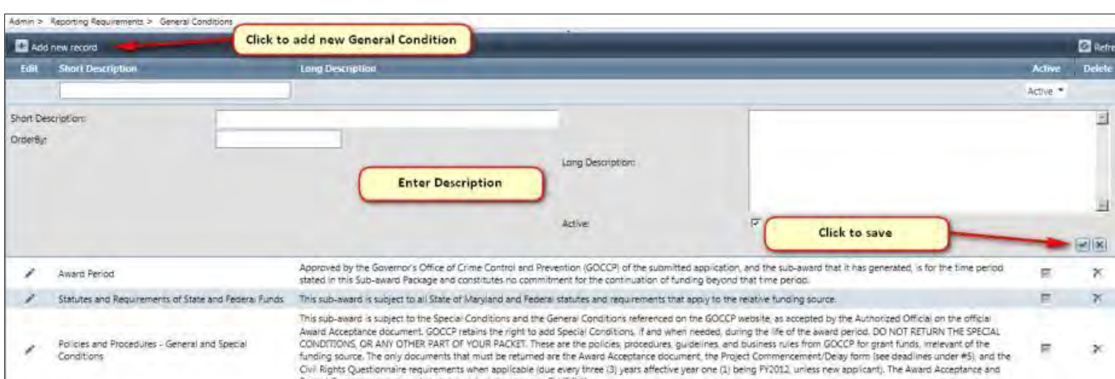


Figure 416 - Add New General Condition

3. The new General Condition will now appear in the Grant Menu "Available General Conditions" panel.

9.7 Budget Category

The values in this list represent the categories of budget items that are required in a grant application:

Figure 417 - Budget Categories shown in Grant Application Menu

To add a new Budget Category:

1. Access Admin -> Budget Category

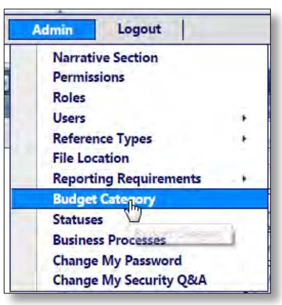


Figure 418 - Admin -> Budget Category

2. Click Add New Record.

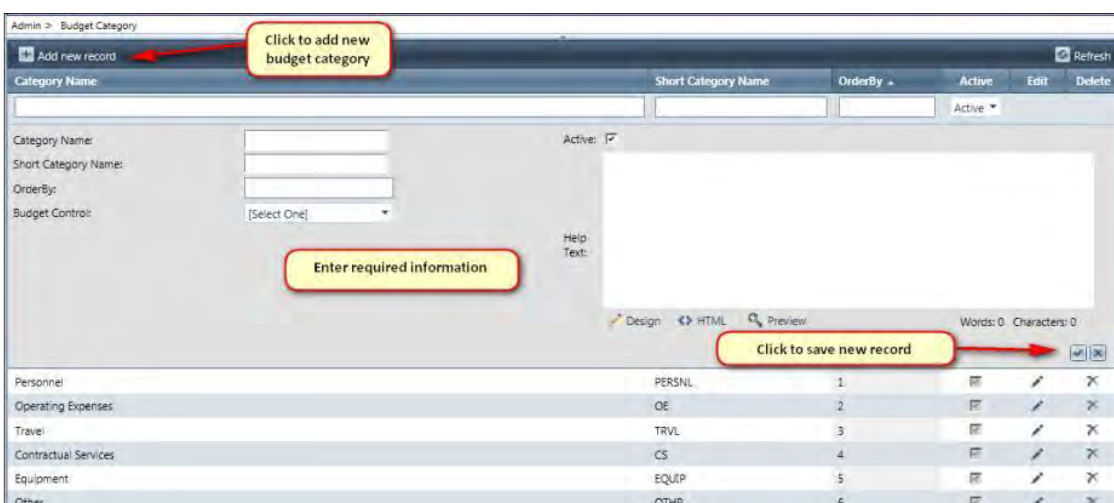


Figure 419 - Add New Budget Category

3. Enter a name for the new category, and a short name that will represent the category.

4. Enter text into the Help Text field that will appear as "Tool-Tip" help in a popup window when a user clicks the help button.

5. Click the checkmark icon in the lower right corner to save the new Budget Category.

9.8 Change My Password

If you want to change your GMS password at any point:

1. Access Admin -> Change My Password

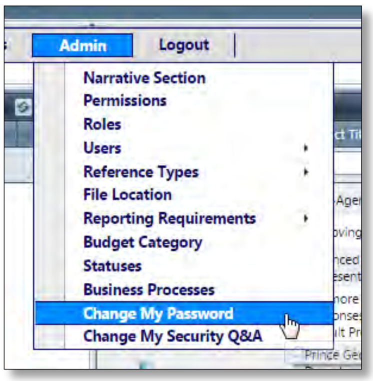


Figure 420 - Admin -> Change My Password

2. Enter your current password. Then enter your new password, and re-enter it into the Confirm New Password field.

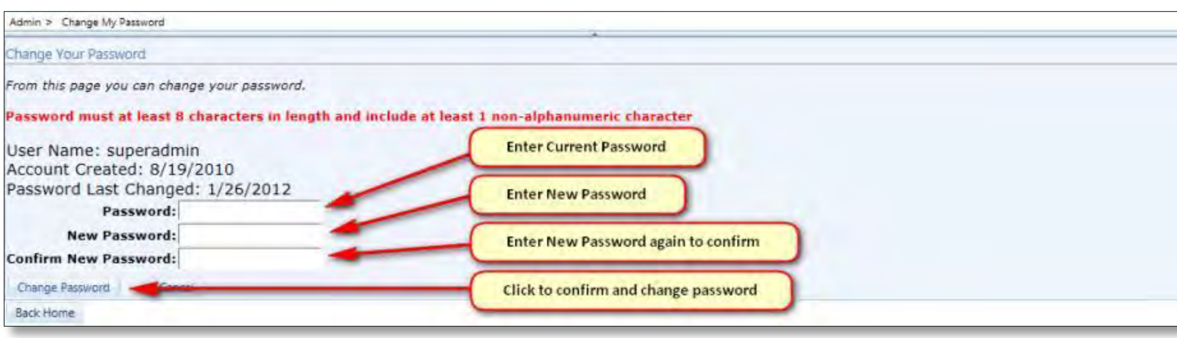


Figure 421 – Enter New Password

3. Click the Change Password button.

9.9 Change My Security Q&A

Security Q&A offers an added level of protection to your GMS account. You will be asked for the answer to your security question if you require technical support. If you want to change your GMS Security Question and Answer at any point:

1. Access Admin -> Change My Security Q&A

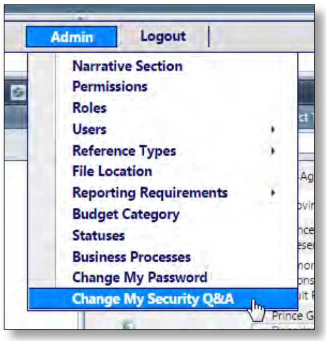


Figure 422 - Admin -> Change My Security Q&A

2. Enter your current password. Then enter your new question and the answer to your new question.

Figure 423 – Enter New Security Question and Answer

3. Click the Change Security Question and Answer button.

10 Reports

GMS provides internal users with the ability to print a wide variety of funding management, grant management, and administrative reports from one central location.

1. Click Reports from the GMS Home Screen to bring up the Reports screen.

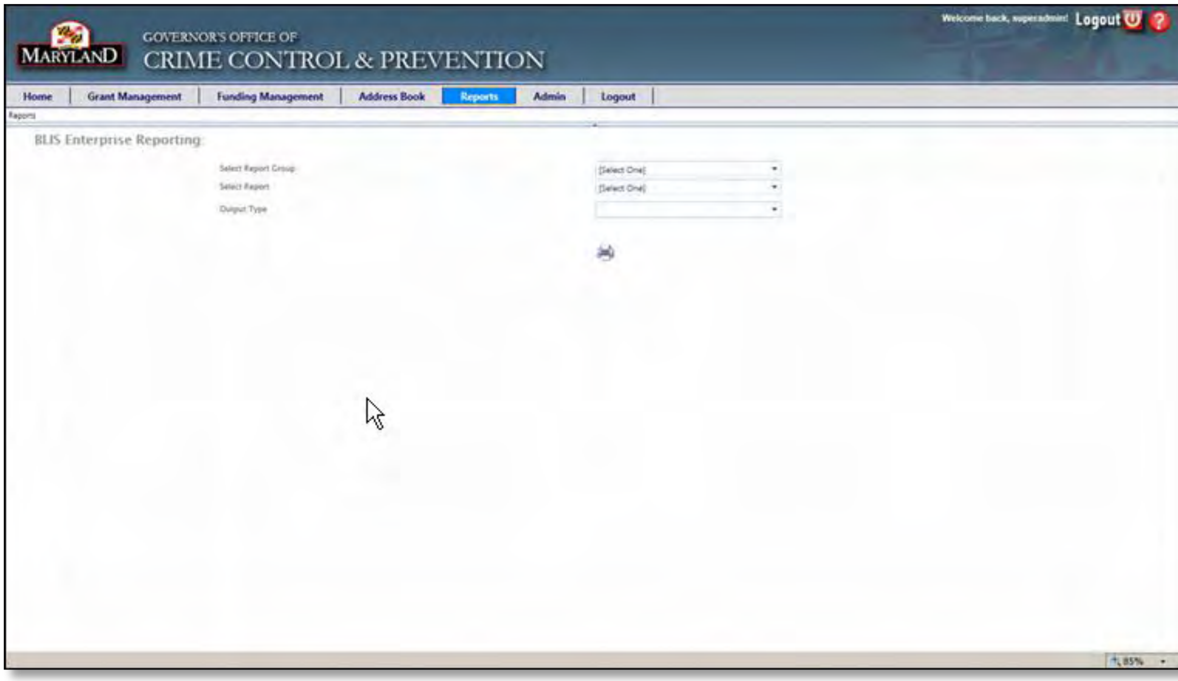


Figure 424 - GMS Reporting Screen

The reports screen is played out in such a way that the options that are displayed depend on the selection of the first category.

2. Begin by clicking the Select Report Group drop-down list. You are presented with the four report categories:

   - Admin Reports
   - Grant Applications
   - Grant Awards
   - Program Funds

3. Select a reporting group, for example Grant Awards

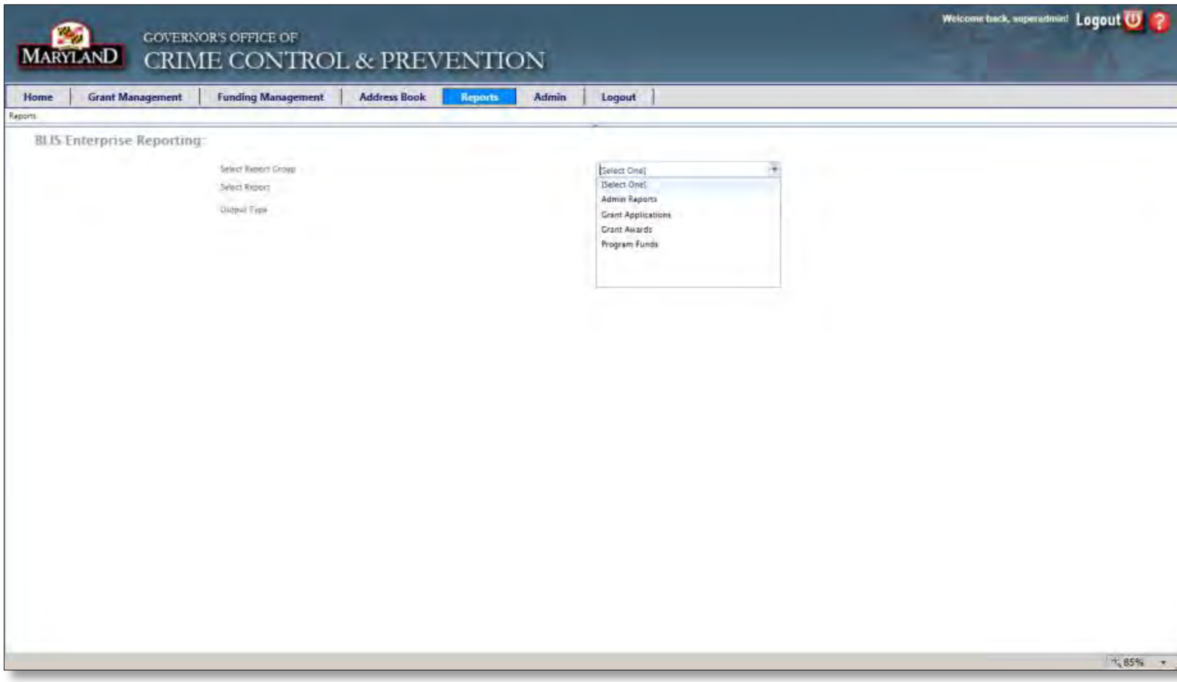


Figure 425 - Reports - Select Report Group

4. Based on the report group you selected, the list of reports available for that group will appear in the drop-down menu next to Select Report.

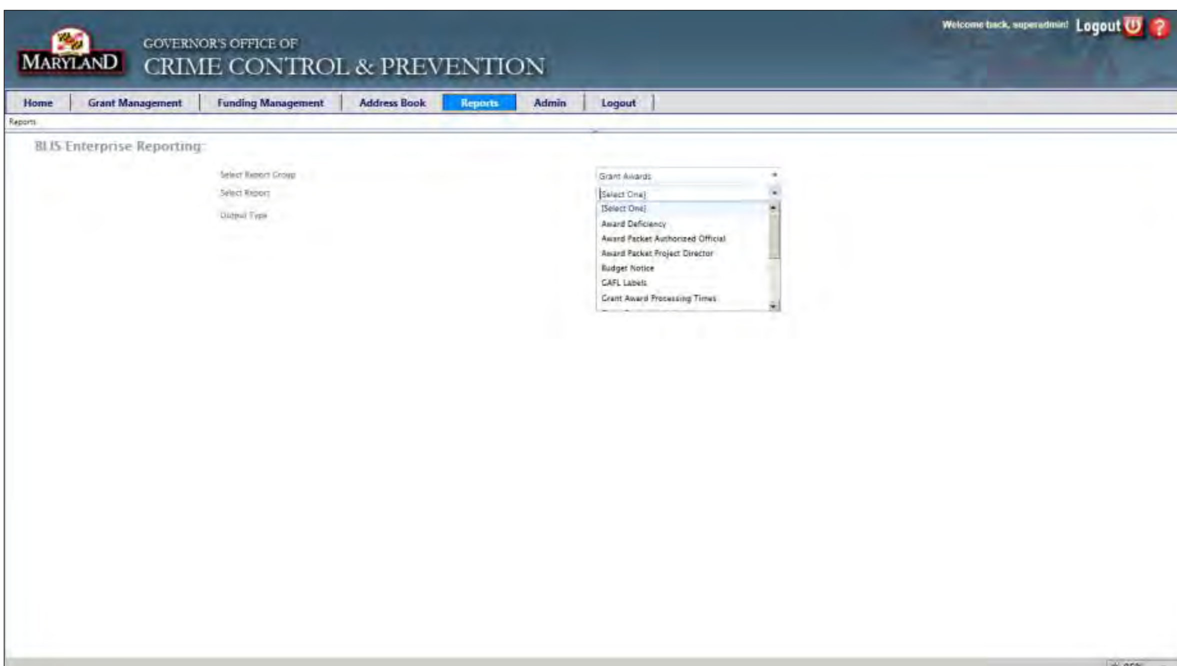


Figure 426 - Reports - Select Report Type

5. Click the drop-down menu next to Select Report and click to select the report, for example Award Deficiency

6. Based on your report selection, different selection criteria are presented to you in the form of selection boxes:

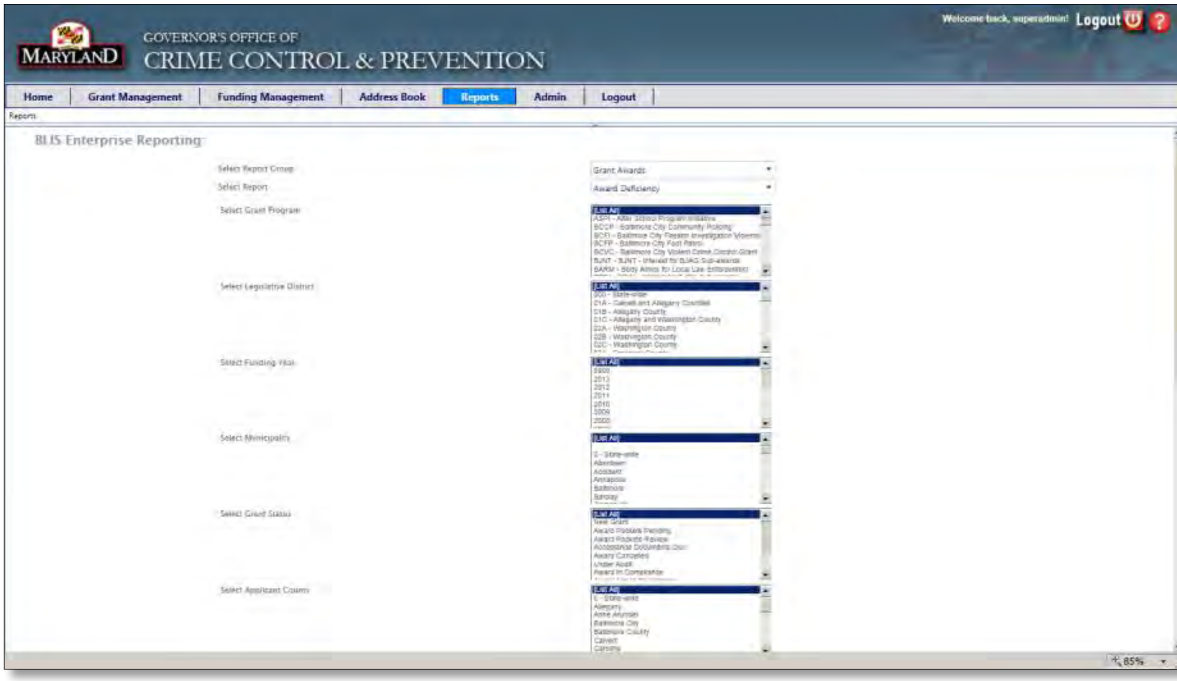


Figure 427 - Reports - Select Reporting Criteria

7. Make your selections for each criteria by clicking on the drop-down list beside each criteria category.

8. Scroll down the page to be sure you've covered all criteria selection.

9. If you want to create the report for a specific Grant Award (works for grant applications as well) you can enter the Award # in the Grant Award Number field near the end of the list:

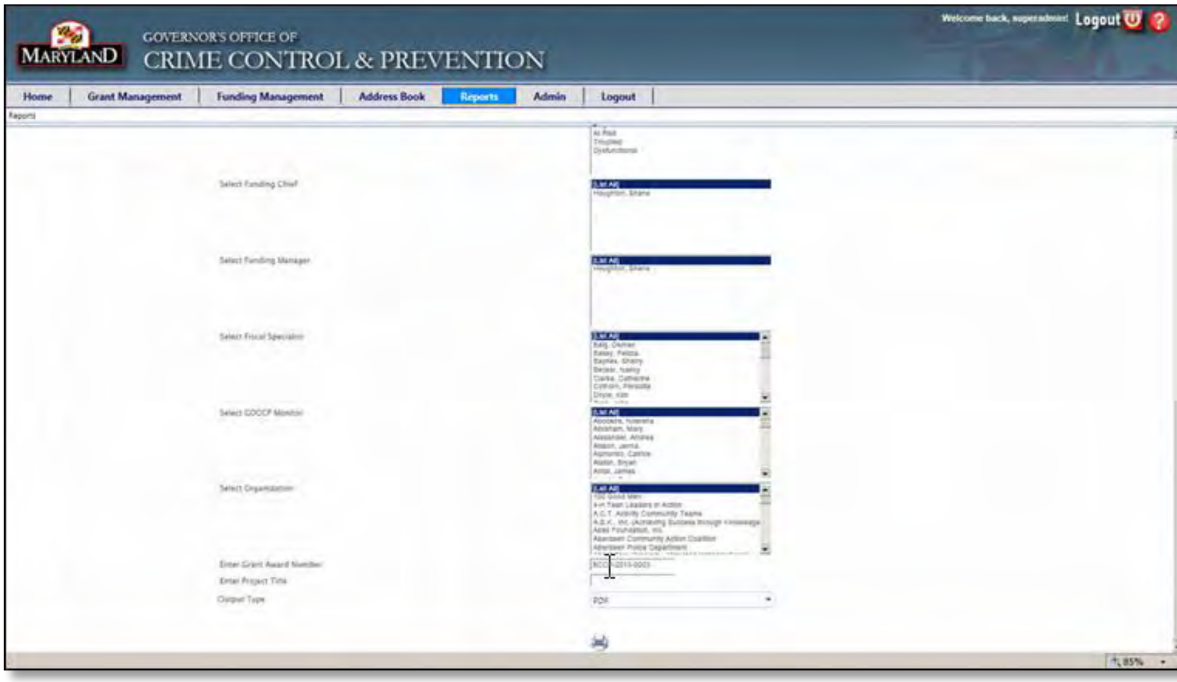
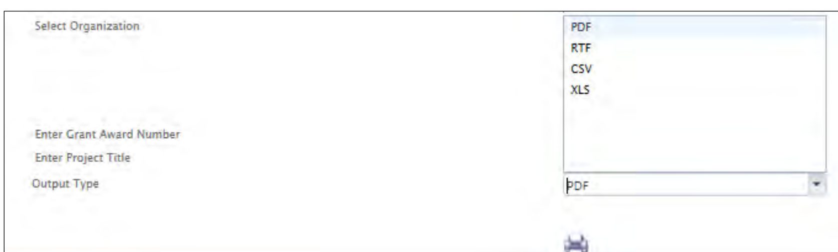


Figure 428 - Report on a specific Grant Award or Application Number

10. Click in the Output Type drop-down list and select:

- PDF (Adobe Acrobat Format)
- RTF (Rich Text Format)
- CSV (Comma Separated Variable Format)
- XLS (Excel Worksheet Format)

Then click the Printer icon to print the report.



11 Appendix – List of Figures