Dashboards for Subrecipient Grant Users

Four new dashboards and four new tables are available to subrecipient grant users.

1. **Task Summary by Phase**
   - On the Home Screen, a list of all tasks due for the user is listed by phase.
   - Click on the hyperlink title for a shortcut to the task list for that phase.
   - With this dashboard, it is no longer necessary to click the heading phase, then pending tasks to locate all pending tasks for the user.
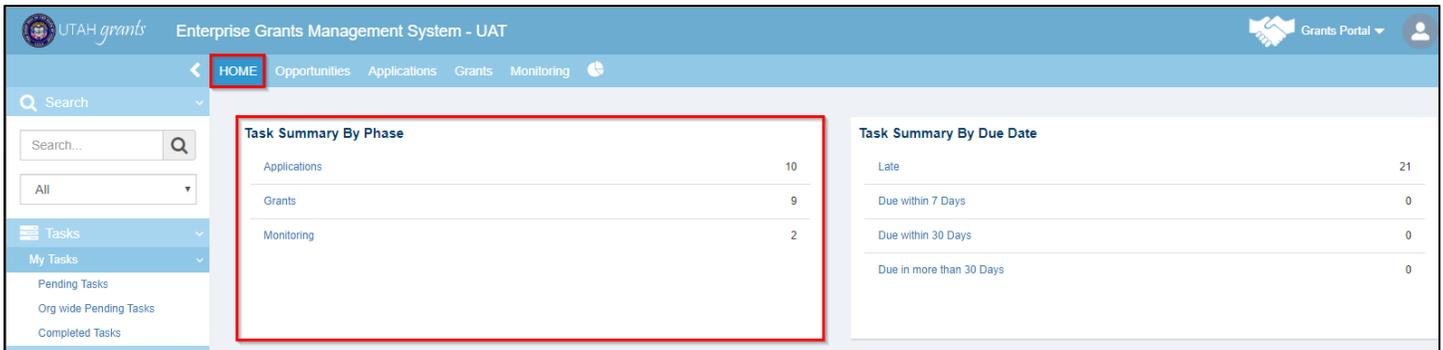
   - For Example, clicking on the Monitoring phase within this dashboard will show a list of all monitoring pending tasks (including pending payment requests).
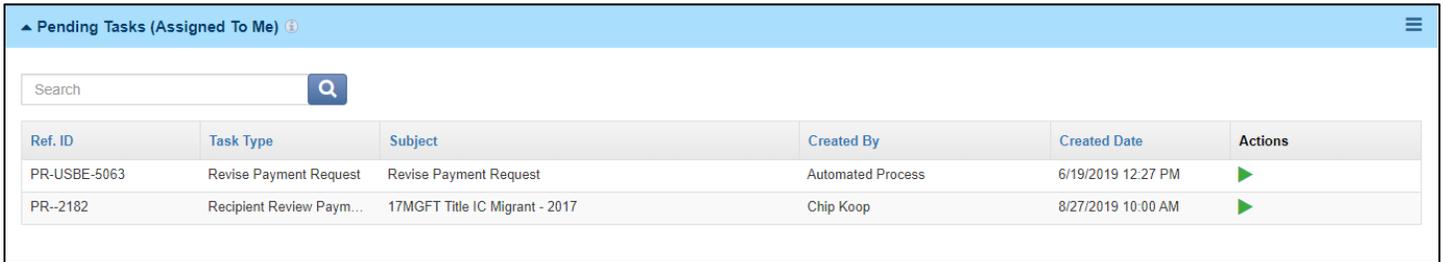
2. **Task Summary by Due Date**
   - On the Home Screen, a list of all tasks is listed by due date.
   - Click on the hyperlink title for a shortcut to the task list for list of all tasks that are pending for the period selected.
   - With this dashboard, users can monitor tasks that have been pending their approval for a given period.
   - Please note: once a task is generated, it is automatically due in 7 days. This is not the same as an application deadline.
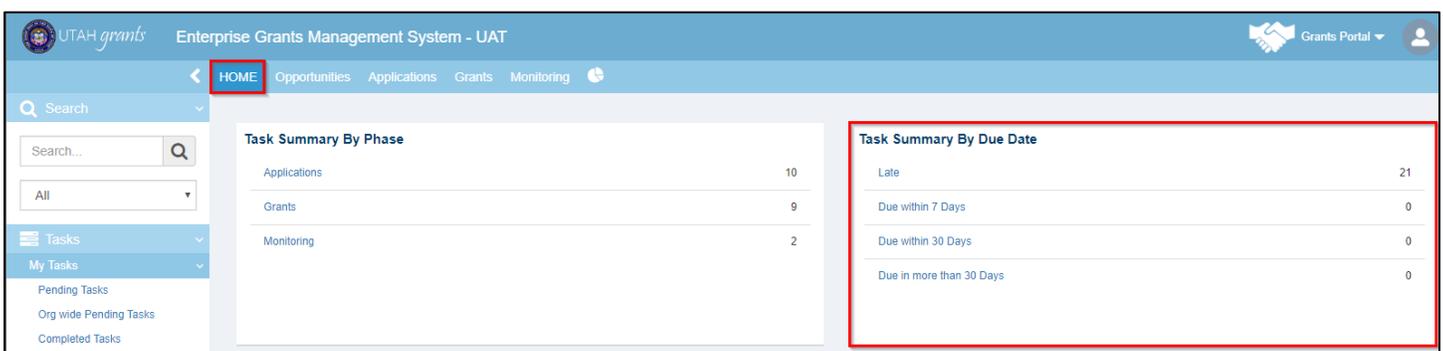
3. Organization Wide Pending-Tasks

- On the Home Screen, a link to the report of all pending tasks for the User's organization is listed under the Task Menu (on the left task pane)

- Use the page navigation toolbar to view up to 100 records and to move between pages
- Use the User Name search to search pending tasks by a specific user.
- Please Note: Applications for Formula Grants are published to all users as a pending task. The application will show as a pending task for all users until it is owned. At which time, all pending tasks will be dismissed, and user must manage the completion of the application by the application deadline.

List of All Tasks

Page Size 25 ▼ << < 1 - 10 > >>   User Name [ ] Search Clear

EGMS Id	Subject	Due Date	Assigned To
AR-3366	Revise Amendment Request	6/18/2019	Chip Koop
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Barry Beckstrand
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Blaine Edman
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Carolyn Merrill
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Carrie Whitney
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Diane Bartlome
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Garrick Peterson
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Joe Backman
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Jackie Ketchersid
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Jana Stutz
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Kip Bromley
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Chip Koop
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Linda Gardner
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Maritza Monterrosa
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Michelle Price
AD-USBE--964	19PUO Digital Teaching and Learning Ongoing - 2019 - 2019	6/25/2019	Rachelle Bolingbroke

4. **Pending Applications by Status**
   - On the Applications Screen, a donut chart showing pending applications by status is displayed.
   - Hovering over the slice will show the number of items in that status.
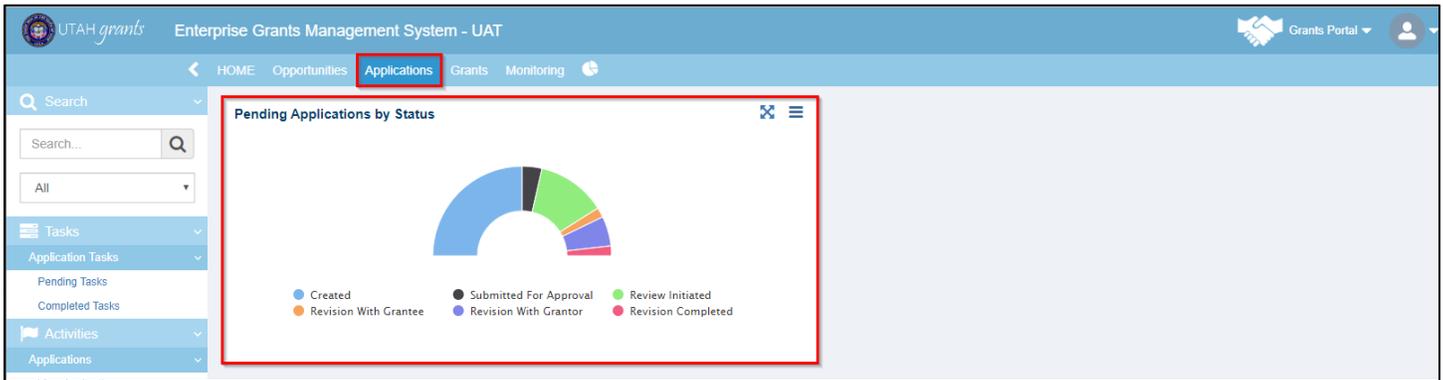
   - Click on the slice to show detail of the pending applications within the status selected.
   - From this data, you can select "View" to be taken directly to the application.

Applications in Status: Created

ID	Applicant Organization	Program Title	Created Date	Action
AP-400-3378	Alpine School District	202FT-NEW Title IIA - Formula Flow Through	2019-05-29 18:24:31	View
AP-400-3709	Alpine School District	REI_FF3_2021	2019-07-02 19:45:44	View
AP-400-3713	Alpine School District	REI_FF4_2021	2019-07-03 15:34:05	View
AP-400-3729	Alpine School District	REI_FF2_2015	2019-07-23 18:42:54	View
AP-400-3734	Alpine School District	REI_FF1_2020	2019-07-24 14:05:38	View
AP-400-3823	Alpine School District	Title 1A - Testing	2019-10-09 17:55:35	View
AP-400-3827	Alpine School District	LSA_2015	2019-10-10 15:40:22	View
AP-400-3831	Alpine School District	REI_FF_MOE_2020	2019-10-18 18:41:35	View
AP-400-3835	Alpine School District	REI_FF_MOE1_2020	2019-10-23 20:24:05	View
AP-400-3839	Alpine School District	REI_FF_MOE1_2020	2019-10-23 20:24:11	View
AP-400-3843	Alpine School District	REI_FF_MOE1_2020	2019-10-23 20:24:14	View
AP-400-3847	Alpine School District	20T1FT Title IA	2019-10-28 18:46:28	View
AP-400-3909	Alpine School District	20T1FT Title I Part A	2019-10-28 20:11:30	View
AP-400-3929	Alpine School District	Title4_testing_2019	2019-11-07 15:09:01	View

Close

   - Click on Enhanced View or Menu: Show All Data links [⤢ ≡] to get further details on all data associated with the dashboard.

5. Applications table

- On the Applications Screen, a table showing Status, when the Application was Submitted, and the Application Deadline is displayed.
- You can sort the information on this table by clicking on the column headings.
- For any applications that were not submitted, the Submitted On field will be blank.

6. All Grants table

- On the Grants Screen, a table showing Payment Types (Reimbursement Required, Lump-Sum, and App 1/12) is displayed.
- You can sort the information on this table by clicking on the column headings.
- This table shows the Project Period, the Status of the program, Total Amount Awarded, and the Remaining Amount by program.

7. Pending Payment Requests – USBE

- On the Monitoring Screen, a donut chart showing pending payment requests by status is displayed.
- Hovering over the slice will show the number of items in that status.
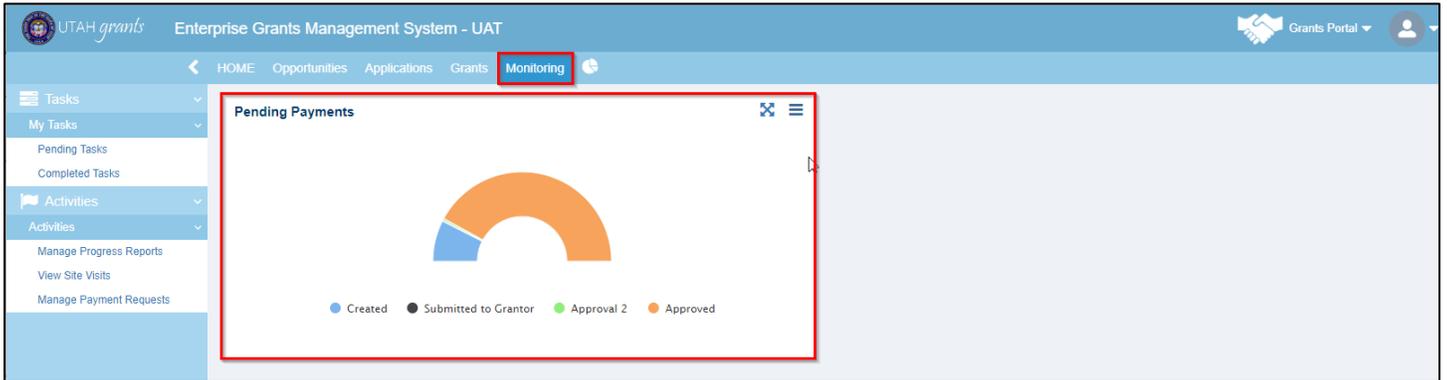
- Click on the slice to show detail of the pending payment request within the status selected.
- From this data, you can select "View" to be taken directly to the payment request.

Payment Requests- Data Selected- Created

Award Title	Recipient Organization	Owner	Approver	Requested Amount this Action	Action
MSP AD--GRADES_1_12_2019-010-2019-4	Alpine School District	Jaime Barrett		$17,100,864.10	View
MSP AD--KINDERGARTEN_2019-010-2019-4	Alpine School District	Jaime Barrett		$751,134.38	View
MSP AD--PROFESSIONAL_STAFF_2019-010-2019-3	Alpine School District	Jaime Barrett		$1,766,264.32	View
MSP AD--SCHOOL_NURSE_2019-010-2019-2	Alpine School District	Jaime Barrett		$8,810.78	View
MSP AD--ENHANCEMENT_FOR_ACCEL_AD_2019-010-2019-1	Alpine School District	Jaime Barrett		$24,035.42	View
MSP AD--SPECIAL_EDUCATION_IMPACTAID_2019-010-2019-1	Alpine School District	Jaime Barrett		$55,970.89	View
MSP AD--SPECIAL_EDUCATION_SELF_CONTAINED_2019-010-2019-1	Alpine School District	Jaime Barrett		$420,599.63	View

Close

8. **Monitoring Schedule for all Active Grants table**
   - On the Monitoring Screen, displayed is a table showing Payment Types (Reimbursement Required, Lump-Sum, and App 1/12).
   - You can sort the information on this table by clicking on the column headings.
   - This table shows the Grant Period, Payment Type, Total Amount Awarded, and Status.