# *LEA Users' Guide*

UTAH *grants*

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REI SYSTEMS

ADA compliant: 9/19/2018

# UtahGrants

***UtahGrants***, located at ***https://utahgrants.utah.gov***, is an electronic grants management system (EGMS) that manages the entire grant life cycle. It is used by Utah State Finance, USBE Financial Operations, USBE Grant Managers, and LEAs; and it is integrated with the Utah State Financial system. All USBE grants (MSP, formula, and competitive) are processed through UtahGrants.

## LEA Users

**LEA Creators** have access in the system to find funding opportunities, create applications, submit payment requests, and complete budget revisions and progress reports.

**LEA Approvers** have the same access as LEA Creators. Approvers also review, approve, and submit grant applications, payment requests, budget revisions, and progress reports.

**LEA Key Points of Contact (KPOC)** have the same access as LEA Approvers, and can also edit the Organizational Profile and can add new users.

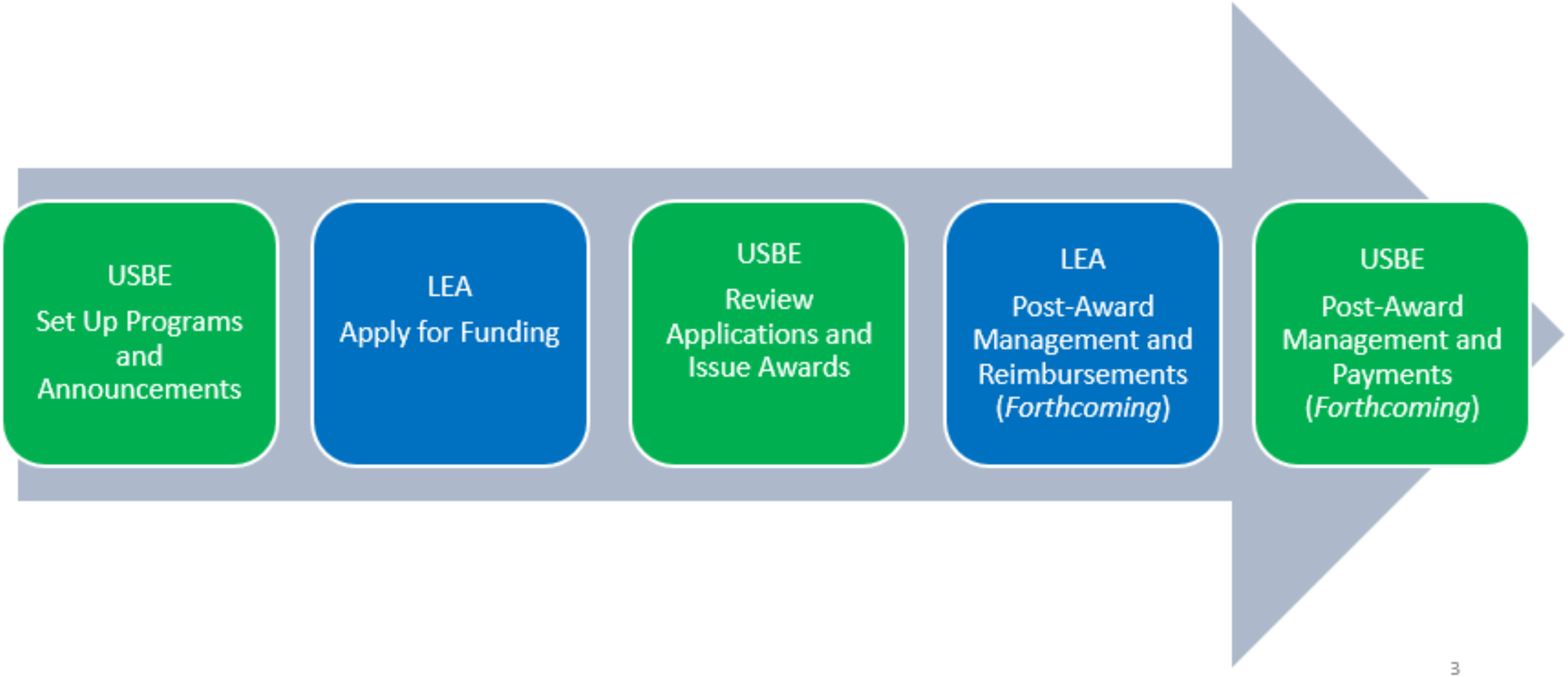
## USBE Users

**USBE Financial Operations (FinOps)** has access in the system to create programs, upload allocations, send application invitations, and manage users and data loads.

**Grant Managers (GM)** have access in the system to view programs, publish announcements, facilitate and complete application reviews, create awards, manage budget revisions, and approve payment requests. Monitoring and closeout activities are forthcoming.

**Program Fiscal Specialists (PO or FO)** use the system to approve awards and payment requests.

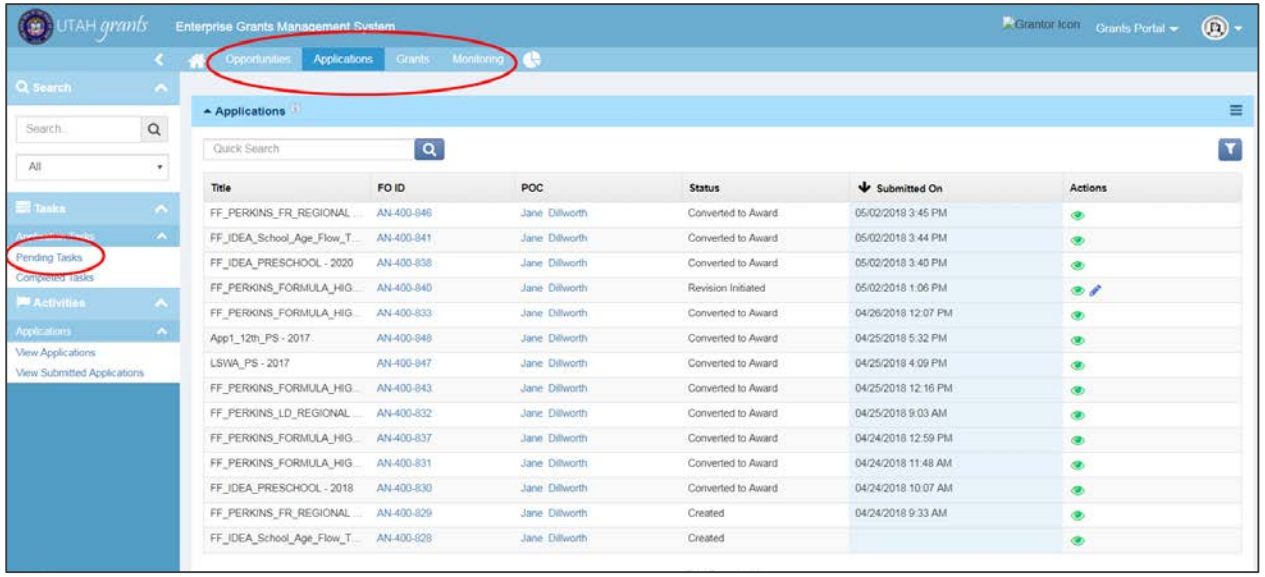
# UtahGrants Program Life Cycle



# UtahGrants Interface

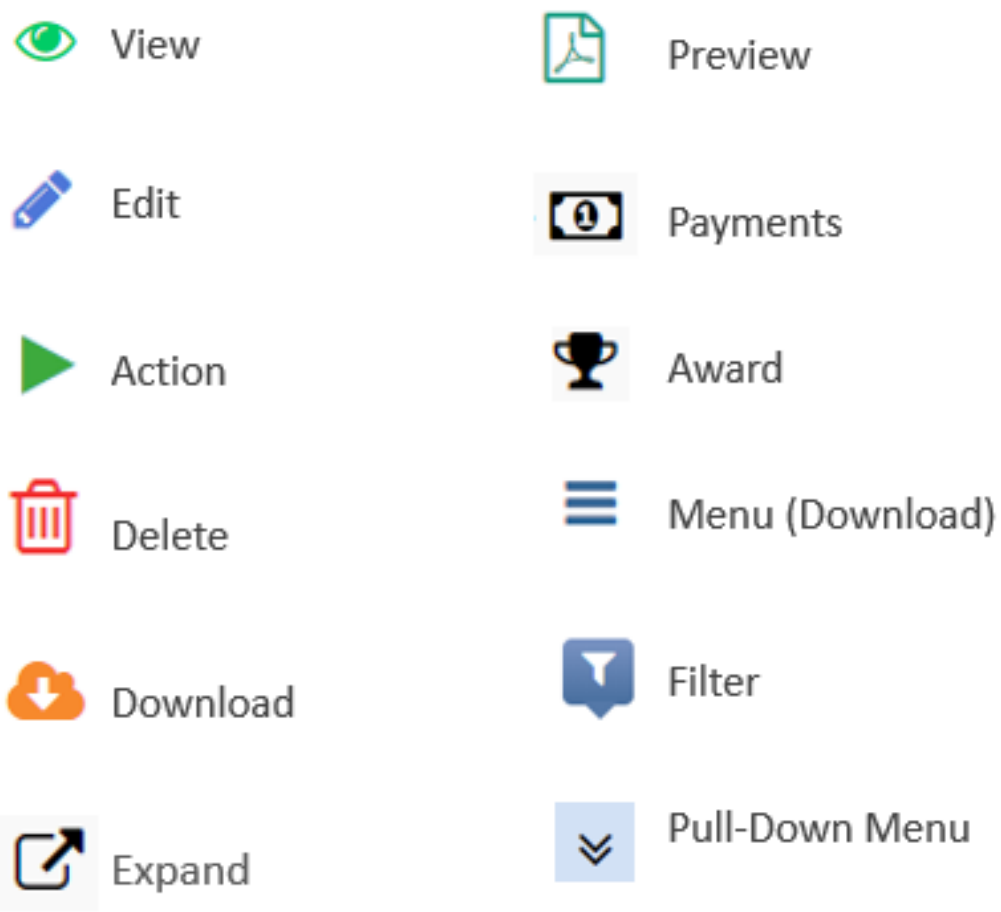
## Navigation and Tabs

| | |
|---|---|
| Home | Manage and view organizational profile. |
| Opportunities | Funding Opportunities (FOAs) are found under the Opportunities tab. |
| Applications | Applications are filled out and submitted under the Applications tab. |
| Grants | Grants and Awards are viewed and revised here. Payment request are generated here as well. |
| Monitoring | Payment requests are internally approved at the LEA in the monitoring tab. *Forthcoming* – progress reports, desk reviews, and site visits. |
| Closeout | *Forthcoming* – grant termination and closeouts. |
| Left Navigation Panel | After clicking any tab along the top, find Pending Tasks in the left menu pane. |



# UtahGrants System

## Icons and Pointers



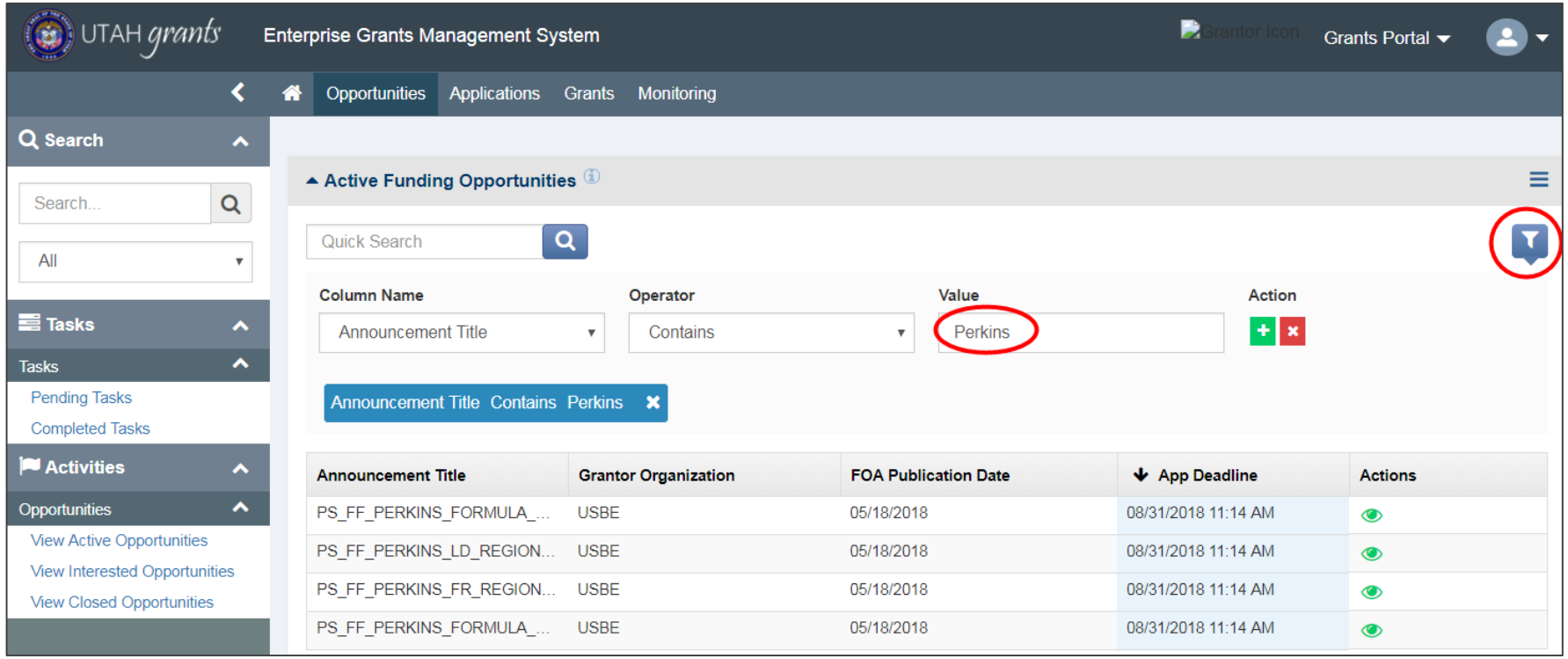

- **Save** often and before you navigate to a new page. Timeout occurs after 30 minutes of inactivity and unsaved data may be lost.

- The system's **Sharing Rule** is that a User can create a Record, such as an Application or a Payment Request. Other Users can only View that Record.

# UtahGrants System

## Search Functions

- Top Left search function searches anything on that current page. The search function on the Home page is global.
- Advanced Search functions are found within each tab and can be specified using the blue Filter icon.
- Add parameters using key words, such as 'Perkins' to find those records. You can add multiple parameters.



# UtahGrants System

## Key UtahGrants Vocabulary

In the context of **UtahGrants**, these key terms have the following functional meanings:

**Program** – Programs are distinct funding mechanisms defined by USBE. They are configured in the system with their own criteria, such as start/end dates, funding sources, budget allowances, indirect cost rates, and eligibility. Programs are created in the system first, then all other records are related to and flow from a Program, including Announcements, Applications, Grants, Awards, Revisions, Payments, and Amendments.

**Announcement** – Announcements are funding opportunities to which LEAs respond with an application. Announcements are associated with Programs, and have defined criteria such as budget periods, application deadlines, or extension allowances. Multiple Announcements can be associated with a single Program.

**Grant** – A Grant is given to a recipient with defined parameters, and are in relation to a specific Program and Announcement. A Grant can contain multiple Awards.

# UtahGrants System

## Key UtahGrants Vocabulary

**Award** – An Award is a subset of a Grant, and is in relation to the legally binding Award Letter. Payment Requests are made against Awards. Changes to the terms of a Grant agreement, including extensions, amendments, or budget revisions generate a new Award on the related Grant.

**Task** – Tasks are created when an action is required by a user, such as approving announcements, applications, awards and payments.

**Budget Revision** – Budget Revisions can occur at any time during the life of the Award. They can be initiated by USBE with allocation changes or alterations to indirect cost rates, or by the recipient to move funds between budget categories.

**Amendment** – Amendments typically result in a new Award being created in the system, and a new Award Letter being issued. The criteria for Amendments may include a change of scope, changes to the Start/End dates, or changes to the amount of the Award.

# UtahGrants System

## USBE Grant Pathway Overview

- **MSP (Minimum School Program)**
  - Do not require LEA to complete an application.
  - Allocation amounts are uploaded by Financial Operations
  - No action required on the part of the LEA
  - Award and payment information is maintained in UtahGrants
- **MSP with Application**
  - Requires LEA to complete an application with detailed budget or waive funding.
  - Allocation amounts are uploaded by Financial Operations.
  - Applications are auto-generated based on pre-determined eligibility and allocation methodology.
- **Formula**
  - Requires LEA to complete an application with detailed budget or waive funding.
  - Allocation amounts are uploaded by Financial Operations.
  - Applications are auto-generated based on pre-determined eligibility and allocation methodology.
- **Competitive**
  - Announcements are published for competitive grants in UtahGrants.
  - LEA has the option to apply if interested.

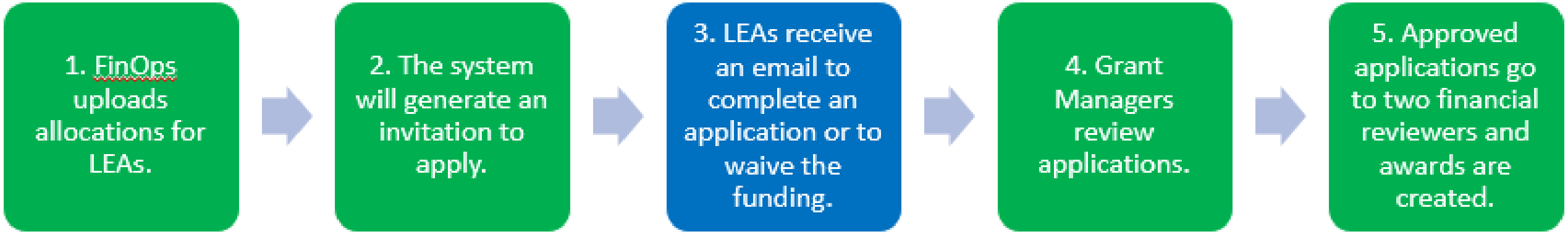
# UtahGrants System

## How Applications Begin

| | | |
|---|---|---|
| **MSP grants** – Created by FinOps with no action needed by LEAs. | → | Automatic awards are made by FinOps. LEAs can view MSP awards in the Grants tab. |
| **MSP with Application** – Created by FinOps. LEAs receive an email and complete an application w/ an option to waive funds. LEAs without an allocation will not receive an application. | → | LEA will receive an email. Log in and go to the Applications tab > Pending Tasks to find the draft application. |
| **Formula grants (State and Federal)** – Created by FinOps. LEAs receive an email and complete an application w/ an option to waive funds. LEAs without an allocation will not receive an application. | → | LEA will receive an email. Log in and go to the Applications tab > Pending Tasks to find the draft application. |
| **Competitive grants (State and Federal)** – Programs are created by FinOps, announcements are created and published by GMs. | → | LEA goes to the Opportunities tab to view an FOA. LEA selects 'Interest' for the Opportunity to start an application. |

# UtahGrants System

## USBE Workflow for Formula Grants

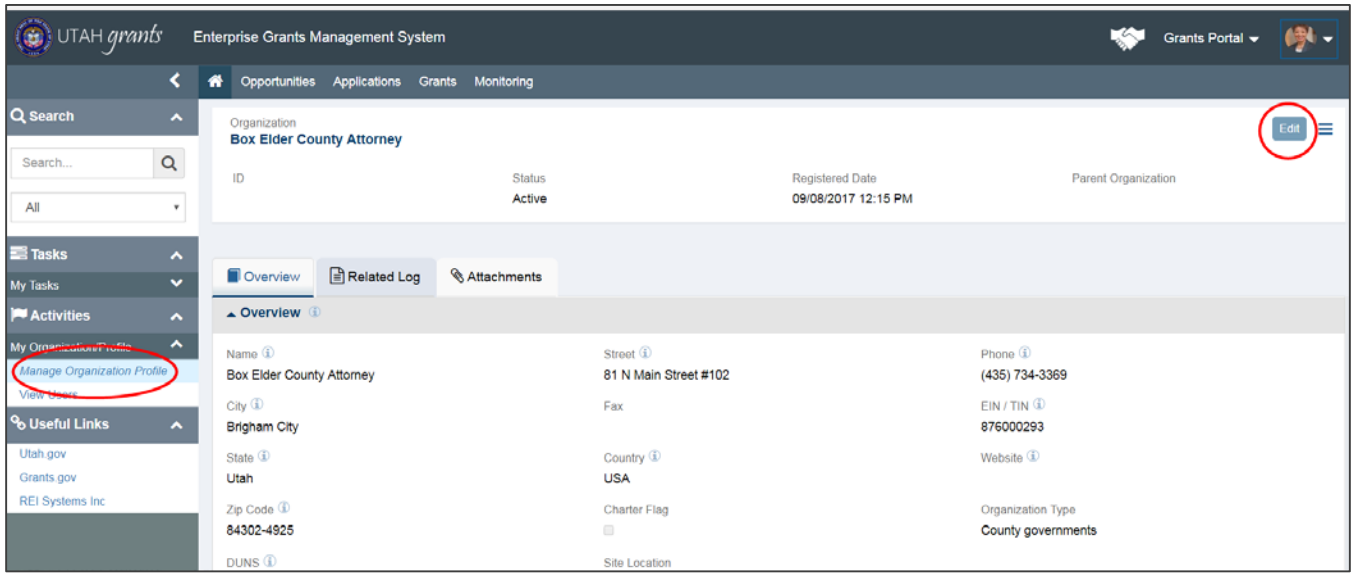


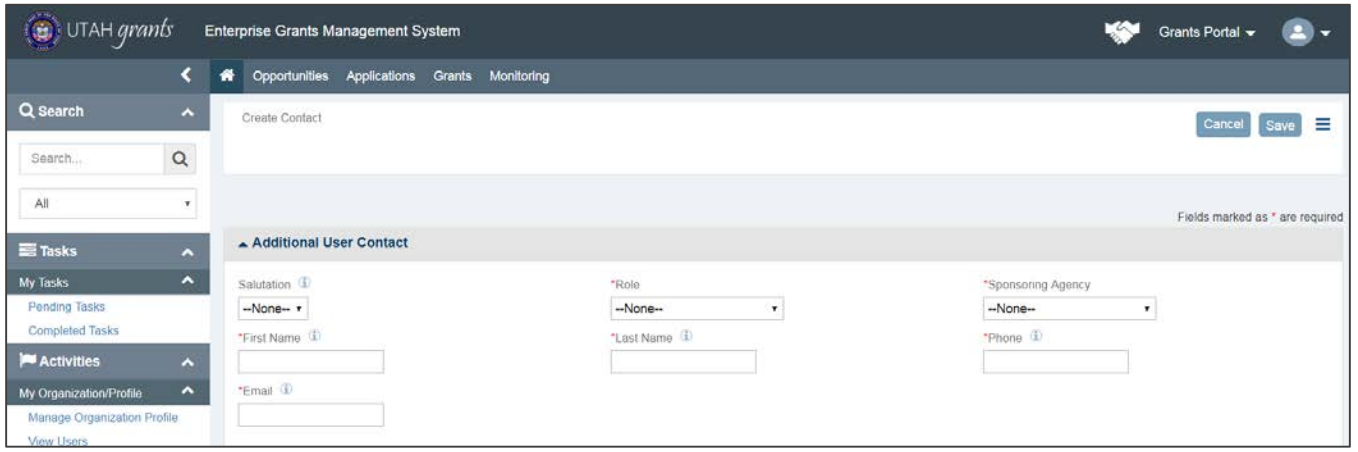

1. Allocations are based on individual LEA's qualifications for each program. LEAs which do not qualify for a given program will not get an invitation to apply.
2. Applications will be created in a Draft status, and sent out to LEAs as Tasks.
3. The LEA User who clicks on the Task first becomes the Owner of the Application, and will be the only person who can edit it. Applications will only be visible in the Applications list once it has been picked up by a user. Applications will be pre-populated with an Allocated Amount, which cannot be edited. The Total Requested Amount must match the Allocated Amount to the penny.
4. Application reviews can begin as soon as the application is submitted by the LEA.
5. Awards can be created as applications are submitted and reviewed. Once an Award is activated, Payment Request can be submitted and monitoring can begin.

# LEA Profile and User Management

## Edit Organization Info and Add Users

- LEA organizational profiles and contacts have been set up in UtahGrants by USBE Financial Operations. USBE maintains LEA profiles, users/contacts, and LEA indirect cost rates.
- The LEA KPOC can edit organizational information by going to Manage Organization Profile > Edit. The KPOC can also add New Users, by selecting > Add. Input the User information, then > Save. Next, select the Paper Airplane icon to send an email invitation to the User. The New User must follow the link within the email. USBE will approve the new license.
- To deactivate a User for an active Organization, email utahgrants@schools.utah.gov



# Apply for Funding

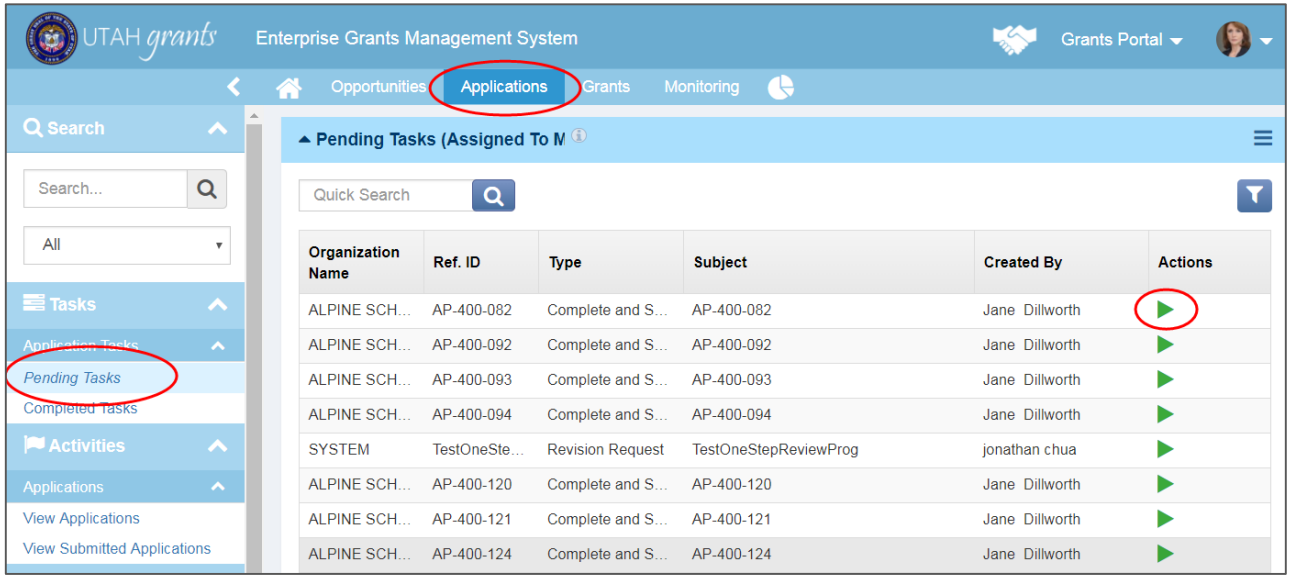
## Formula Applications

### Find a Draft Application for a Formula Program

- Formula grants start with a draft application that must be filled out in UtahGrants.
- LEAs will receive an email with instructions to log in and complete application with an option to waive funding.
- Go to the Applications tab > Pending Tasks > and click the green Action icon to find the Application and edit the draft.

IMPORTANT: ONLY click the green Action icon for applications on programs for which you are responsible. Clicking the icon makes you the Owner of the Application, which means only you will be able to edit it.

- After you've started the draft application and saved it, you can return and find it listed under in the Applications tab. Select the blue Pen icon to edit.



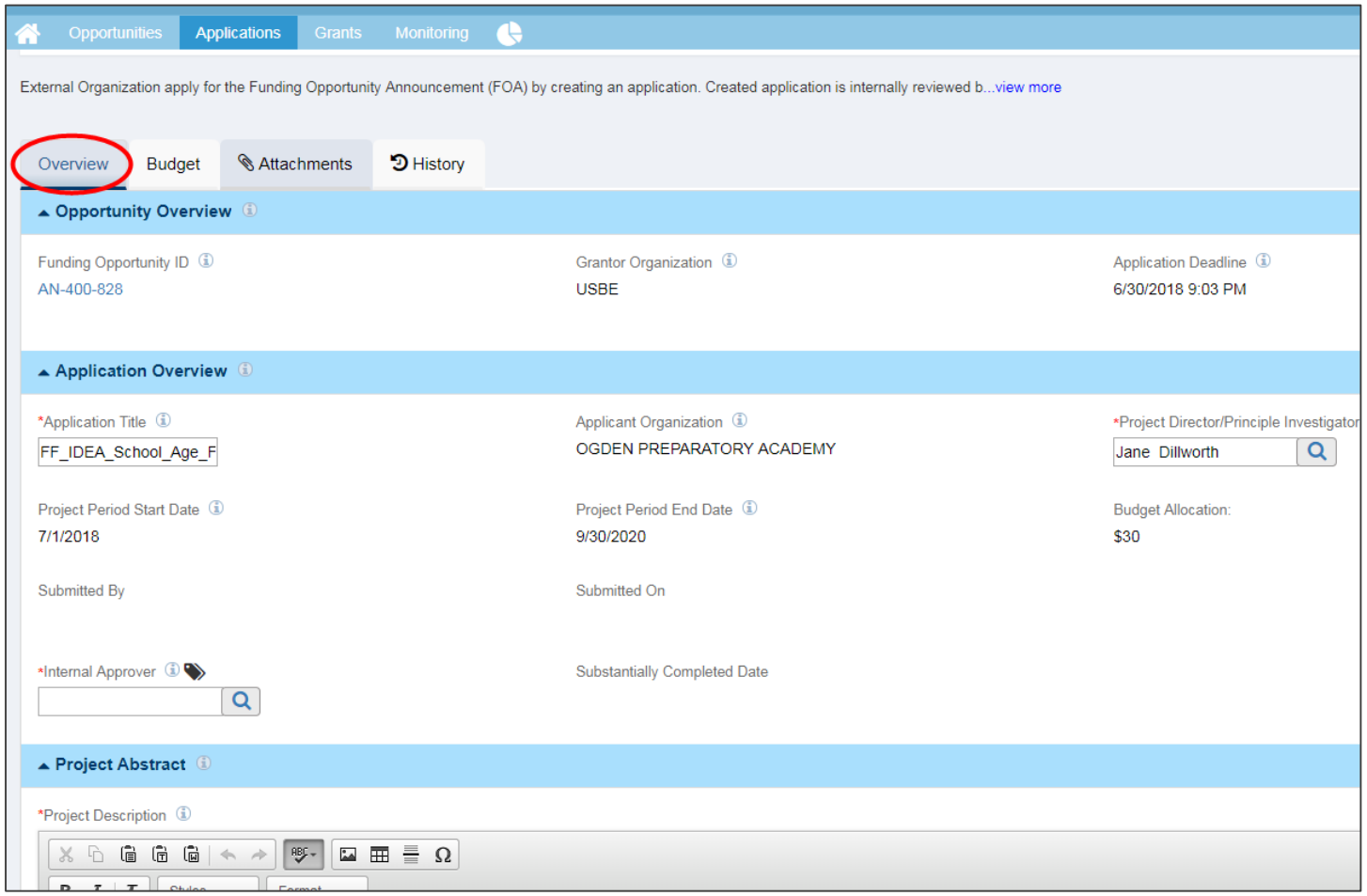
# Apply for Funding

## Complete Applications

### Application Overview

- Complete the Application Overview by editing the Application Title, if needed.
- The Internal Approver/LEA Approver defaults to KPOC, but can be changed to any LEA Approver.
- Add a Project Description, and > Save.

Note: Only the Owner of the Application can make edits. Other Users are able to only view the application.



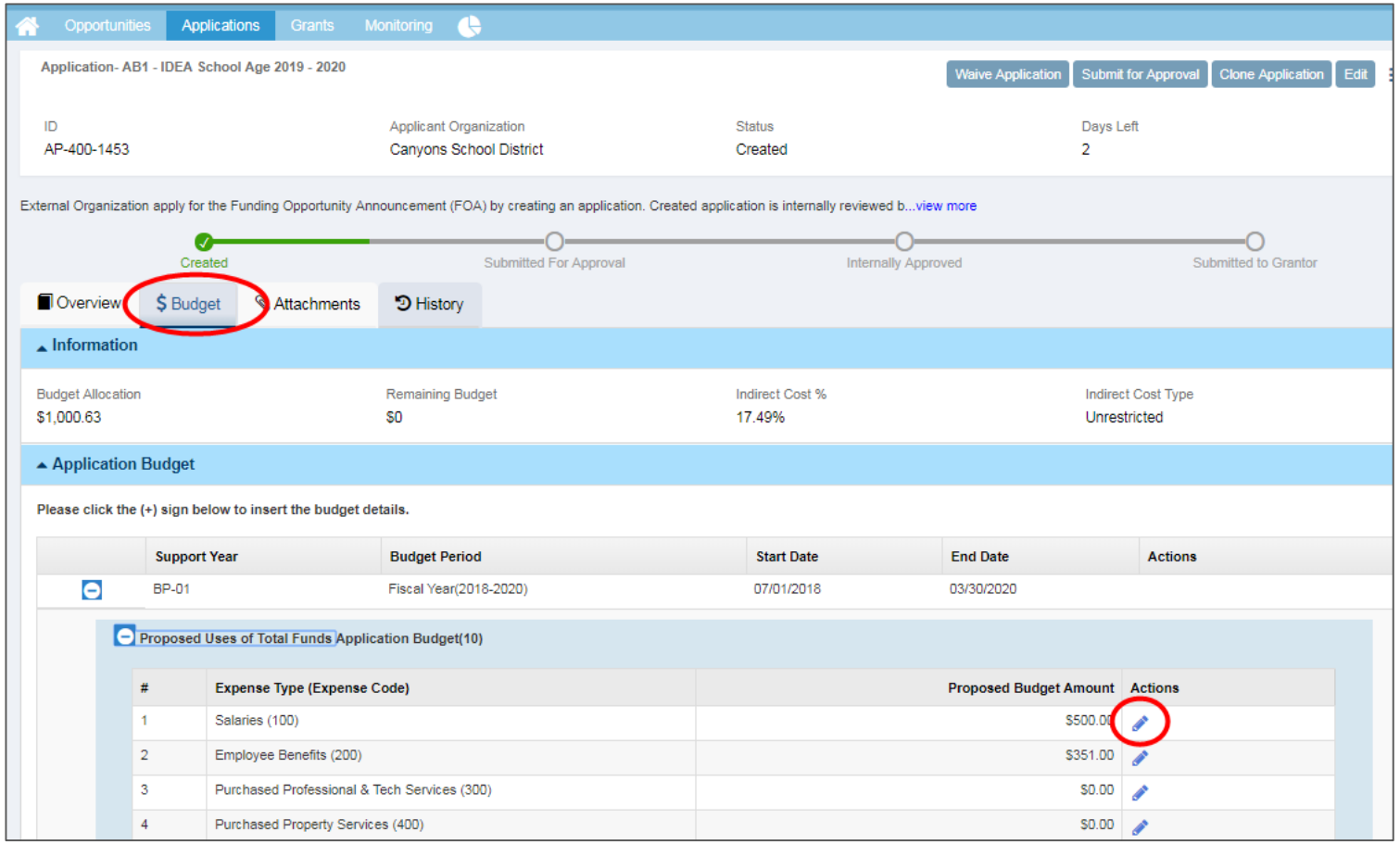
# Apply for Funding

## Complete Applications

### Budget

- Complete the > Budget tab by completing the Budget Narrative. Then, click > Save.
- Fill in the budget by clicking the blue pen icons to open each budget category. Once completed, click > Save.

Notes: Budgets for Formula grants have pre-determined allocation amounts, and the total budget entered must match the allocation. Competitive program budgets are determined by applicants. LEA Indirect Cost Rates are maintained by USBE and will auto-populate and auto-calculate on the budget form.



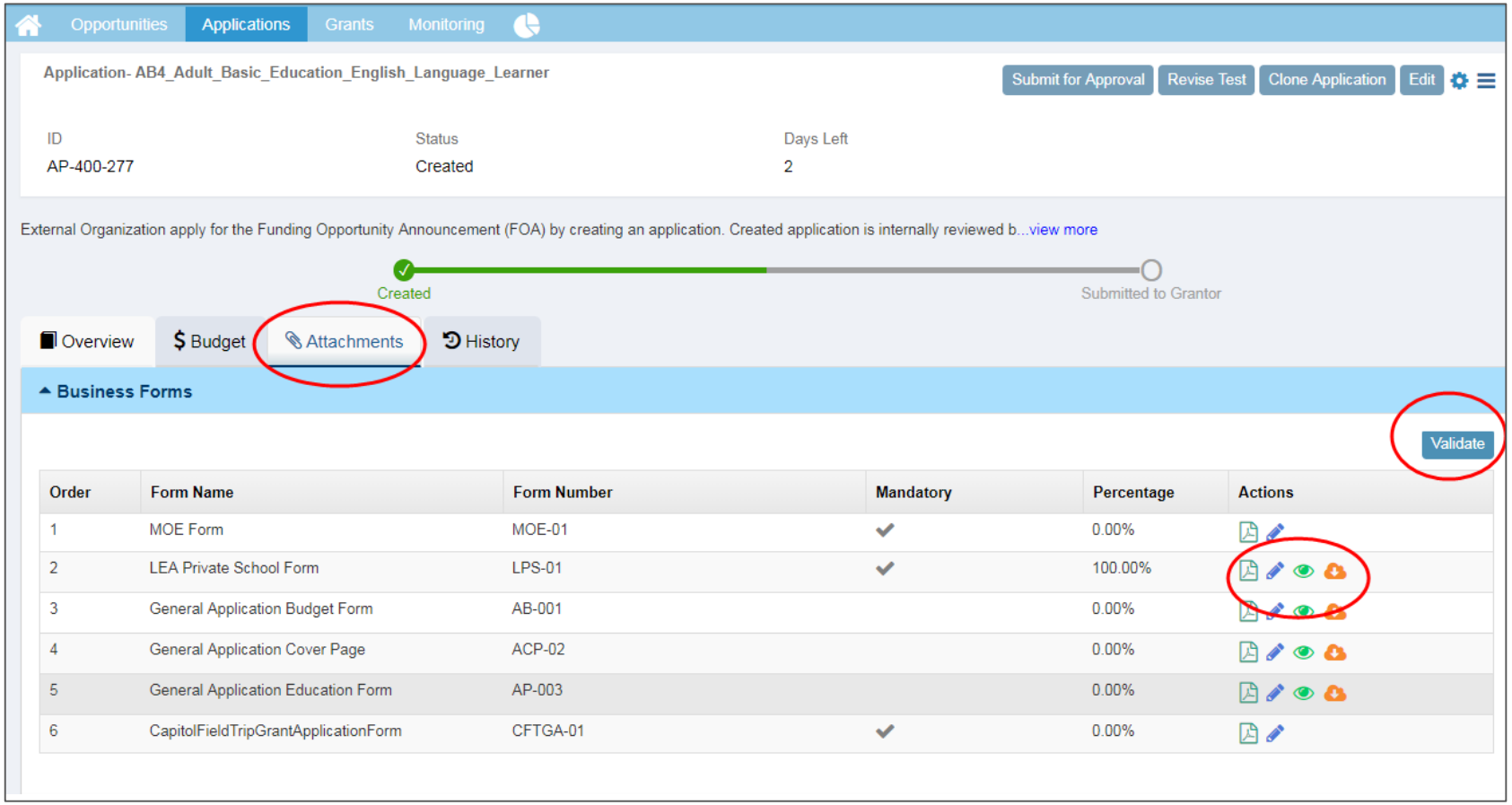
# Apply for Funding

## Complete Applications

### Forms

- Go to the Attachments tab. Complete data forms that may be required for the grant program. Click the blue Pen icon to edit. Once all forms are completed to 100%, select Validate.

IMPORTANT: Once you click Validate, you can no longer edit the forms.



# Apply for Funding

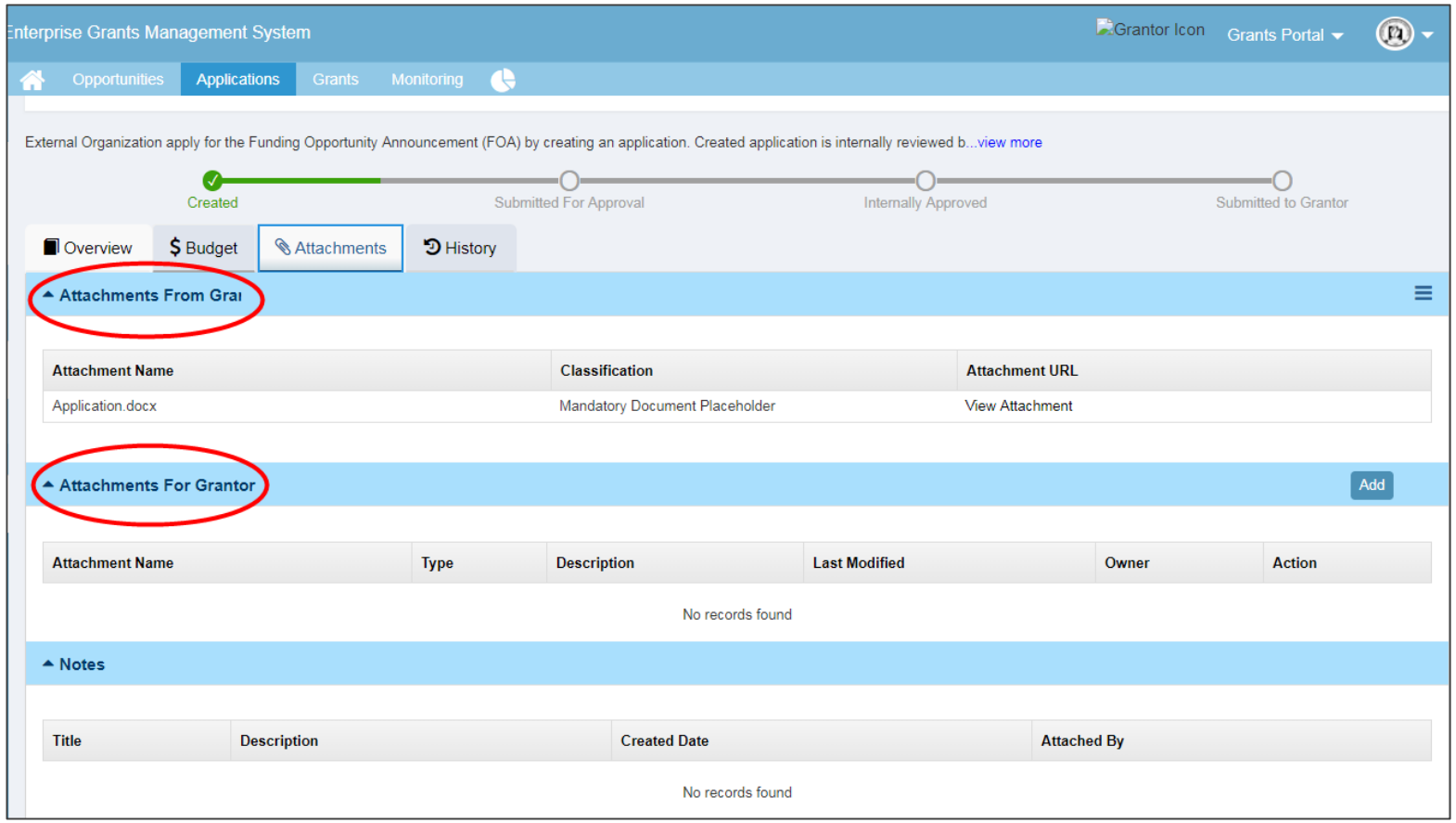
## Complete Applications

### Attachments

- Complete attachments by first downloading the Attachments from Grantor > View Attachment. Then, complete the form outside of UtahGrants.
- Upload the completed files under Attachments for Grantor > Add.

Note: Optional/'Other' attachments for the application are uploaded here as well.

- Once the application is complete, select Submit for Approval. The LEA Approver specified on the Overview tab will receive an email and a Task to Approve the application.

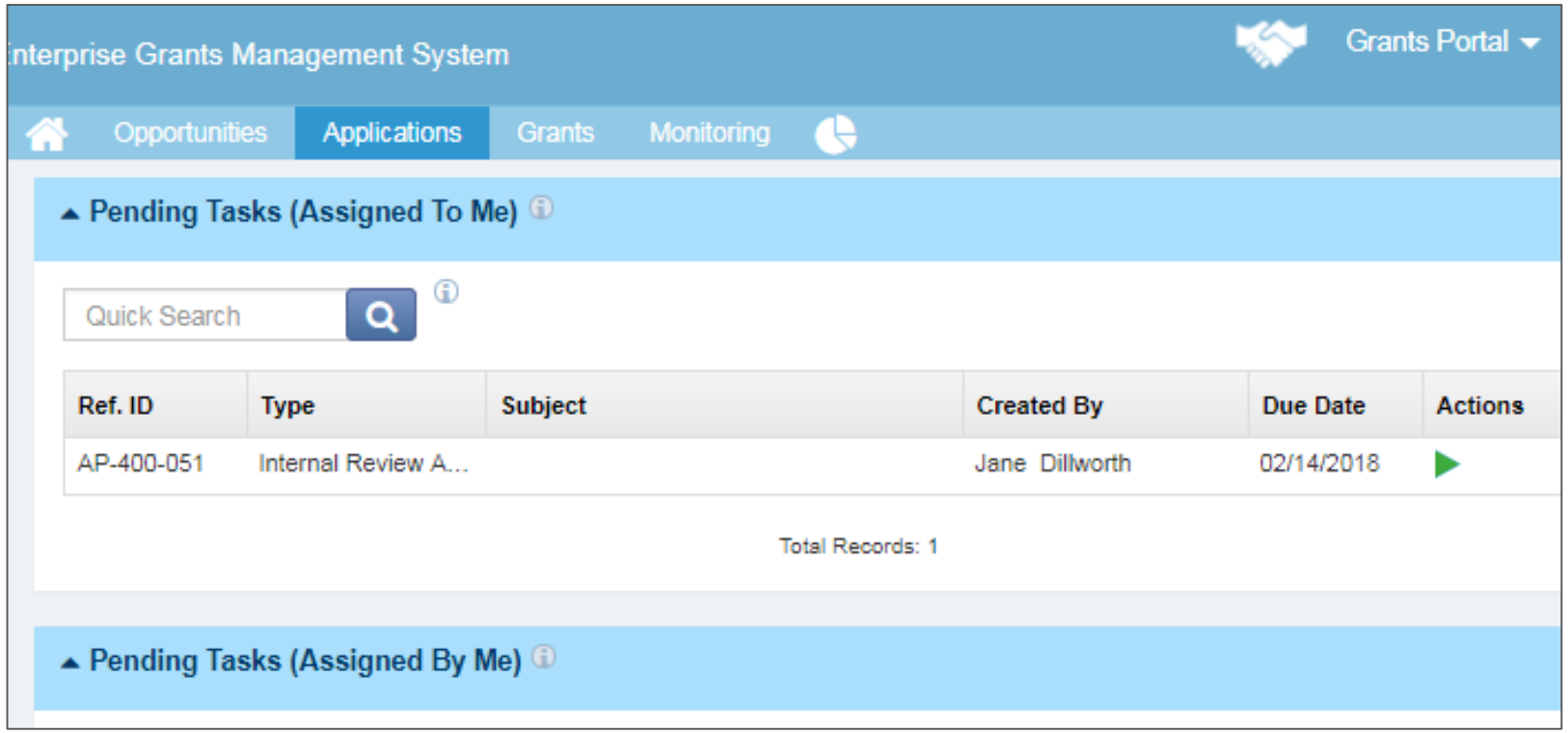


# Apply for Funding

## Submit Applications

### Internal Approval and Submission

- LEA Approver goes to the Applications tab > Pending Tasks, and selects the green Action icon to see the application details.
- The LEA Approver can send the application back to the LEA Creator/Owner of the application to make changes. When the approval does take place, the application will automatically be Submitted to USBE.

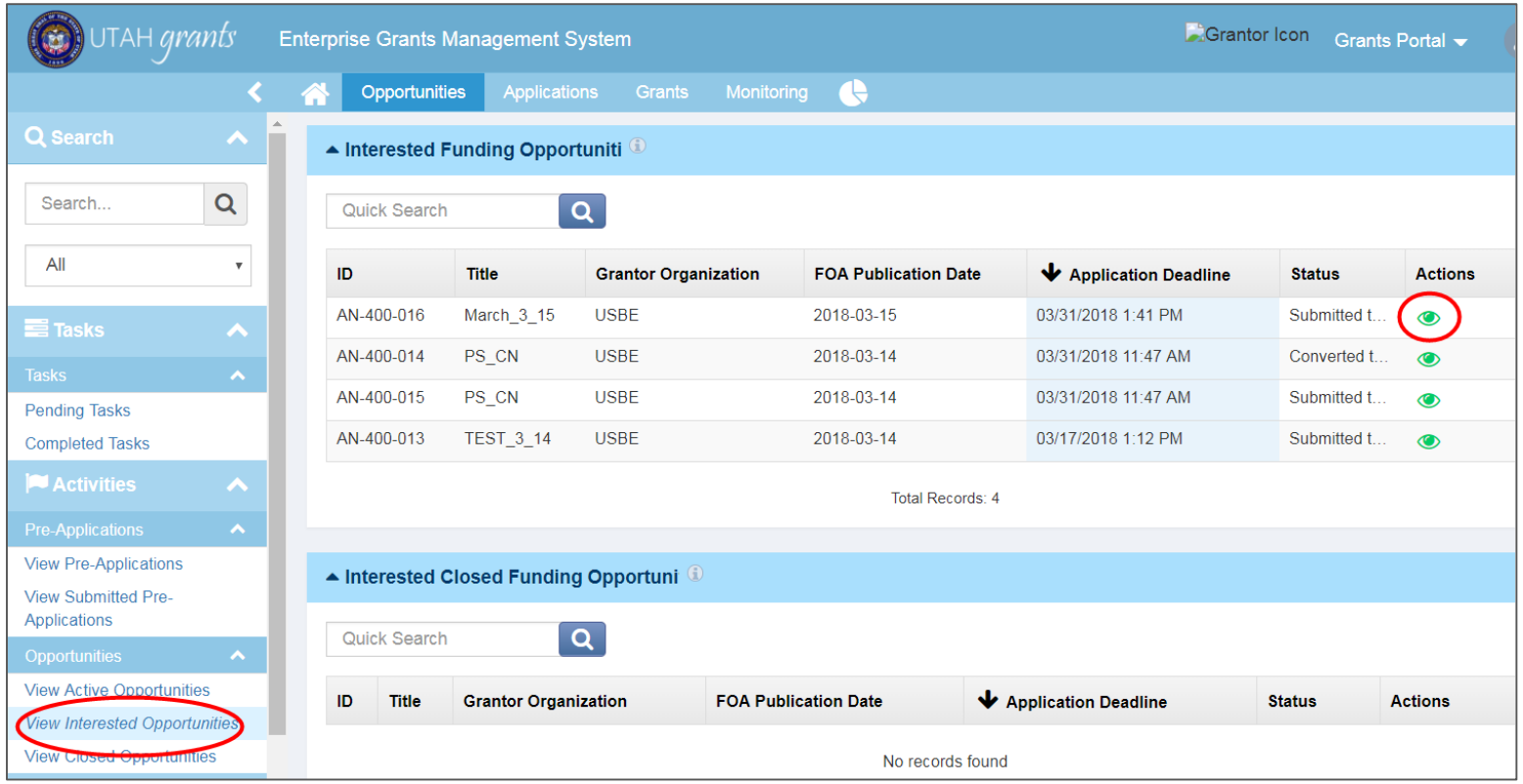


# Apply for Funding

## Competitive Opportunities and Applications

### Find a Competitive Opportunity and start an Application

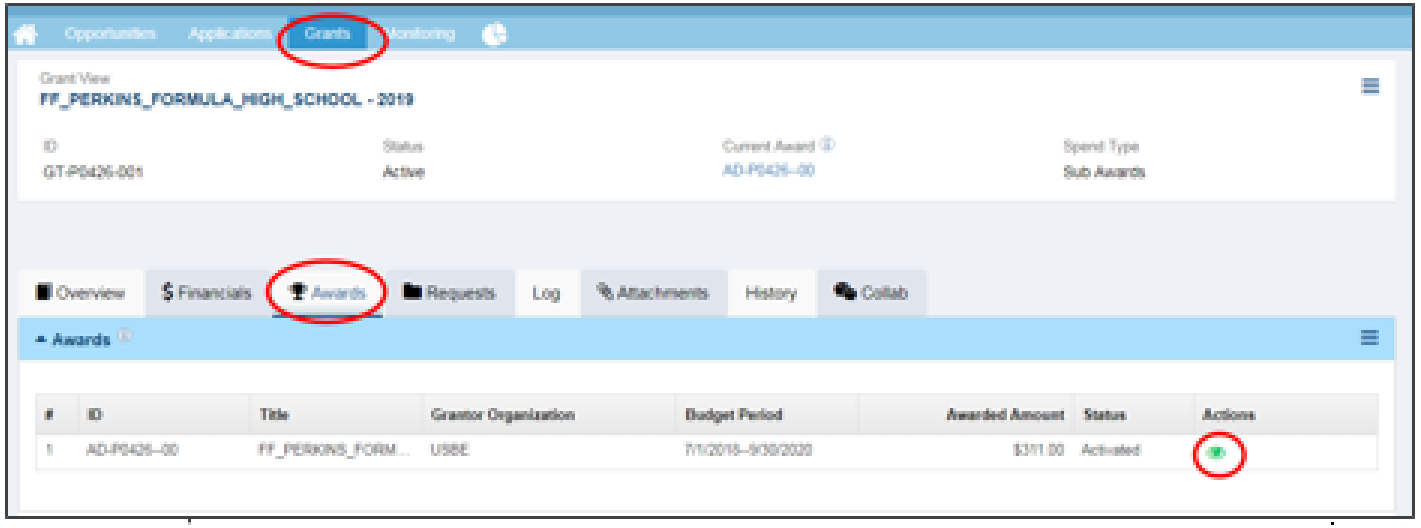
- Competitive Funding Announcements are found in the Opportunities tab.
- Go to the > Opportunities tab.
- Select the green Eye icon to view the opportunity details.
- Select 'Interest' if you wish to apply.
- Then, go to View Interested Opportunities in the Left Navigation Panel.
- Find the 'Interested' Opportunity, select the green Eye icon and > Create Application to start a draft application.

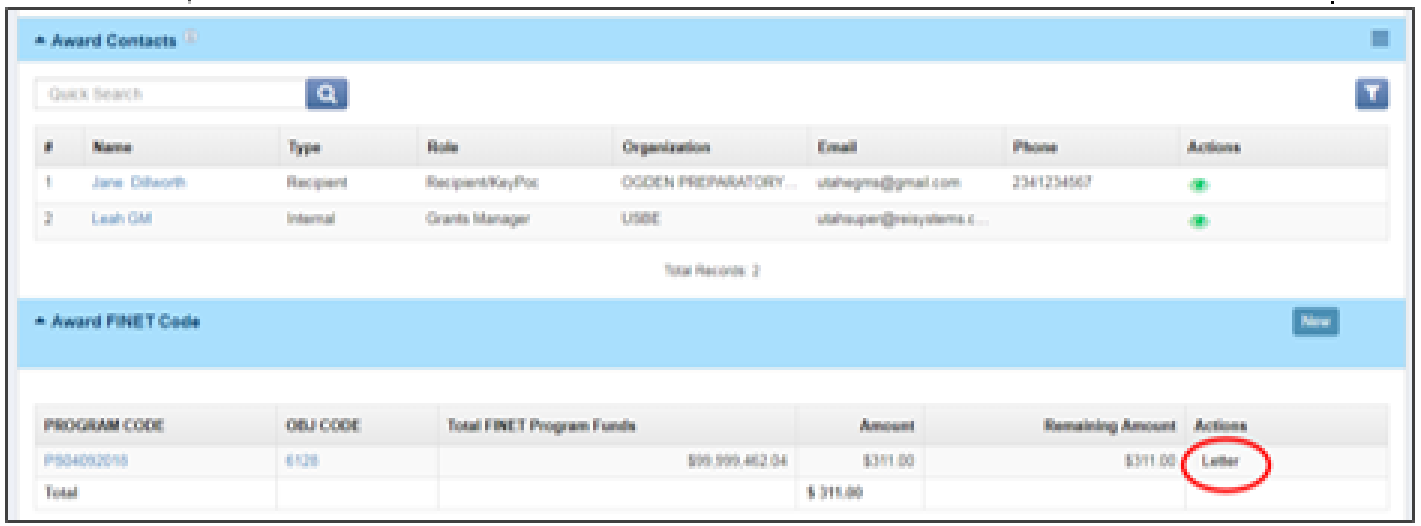


# Post Award Management
## View an Award

### View an Award

- When an Award is issued, LEAs will receive an email notifying them of the Award.
- To view the award, go to the Grants tab and select the green Eye icon.
- Then, within the grant go to the Awards tab, and select the green Eye icon.
- Award details can be viewed here, including the Award Letter.
- Reimbursement requests can be made against the Award here.



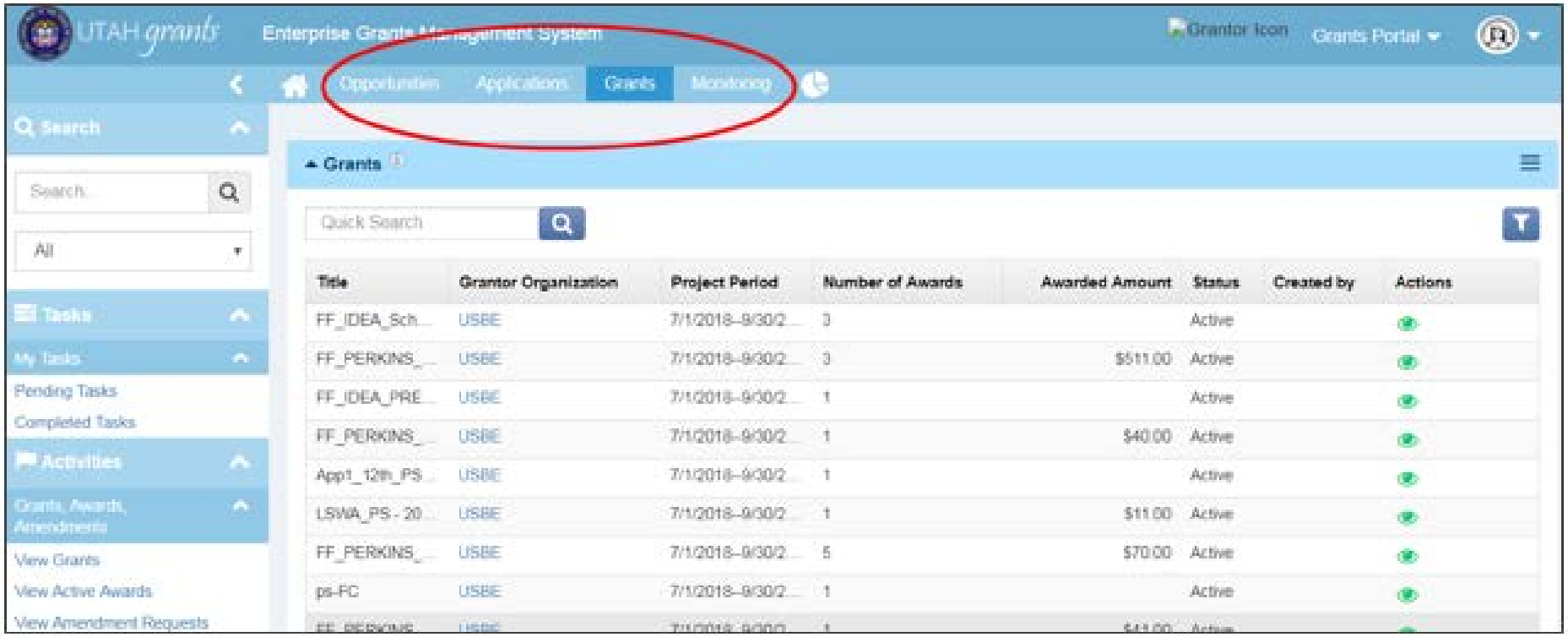



# Next Steps… ☺

- Payment Requests
- Budget Revisions

- Post-Award Monitoring
  - Progress Reports
  - Site Visits
  - Desk Reviews

- Closeout
  - Termination
  - Closeout



# UtahGrants Support

For Support Email or Call USBE at:

801-538-7604

utahgrants@schools.Utah.gov