Utah Grants Update

SPRING FINANCIAL TRAINING

MAY 12, 2020

ADA Compliant 5-28-2020

Timelines

Reimbursement Requests

June 10, 2020	Deadline for reimbursements to be paid on June allotment (SFY-2020 period 12)
July 10, 2020	Deadline for reimbursements to be paid on July allotment (SFY-2020 period 13)
August 11, 2020	Deadline for reimbursements for program ending June 30, 2020 (SFY-2021 period 1)

Watch **Project Period** dates. Expenditures must be incurred within the project period of performance.

Utah Grants Modules

Dashboards

Grant Summary Report

Assurances

Site Visits / Desktop Review

Risk Assessment

Dashboards and Tables

1. Task Summary by Phase

2. Task Summary by Due Date

3. Organization Wide Pending-Tasks

4. Pending Applications by Status

5. Applications table

6. All Grants table

7. Pending Payment Requests – USBE

8. Monitoring Schedule Active Grants table

More information can be found here:
https://www.schools.utah.gov/financialoperations/utahgrants

Grant Summary Report

Grant Summary Report

Assurances

LEA Assurances will be completed in Utah Grants

Assurance tasks will be available **June 1, 2020**

Task will be sent to the Utah Grants LEA Key Point of Contact

Can be modified/saved by any Utah Grants user prior to submission

Assurances are due to USBE by **July 1, 2020**

Assurances

Assurances

Assurances

Assurances

Assurances

Saved in Organization Profile

Site Visits / Desk Reviews

Site Visit Notification → Gather & Attach Documentation → Site Visit/ Desk Review
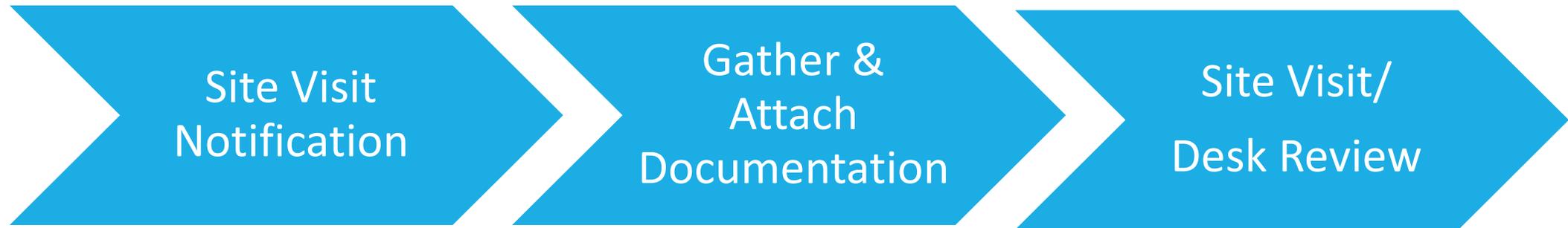
Site Visits - Contacts
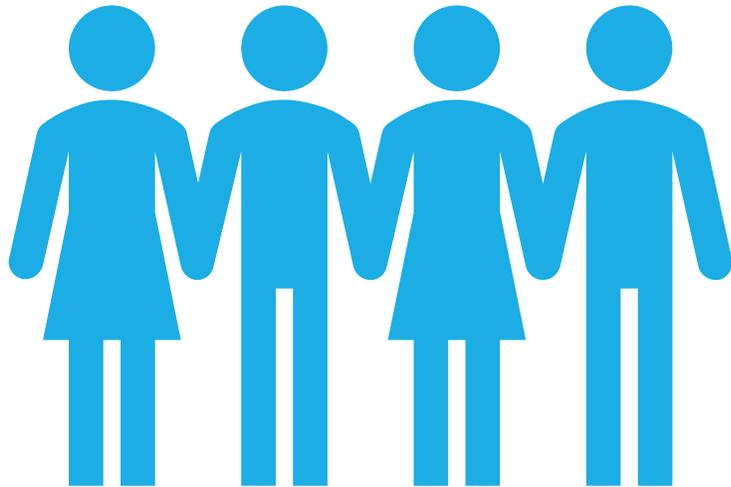
Notification email will be sent from Utah Grants to all Site Visit Contacts

Contacts do not need to be Utah Grants Users to receive notification

Site visit record can be accessed by any active system user

Expected that site visit will be managed by existing user
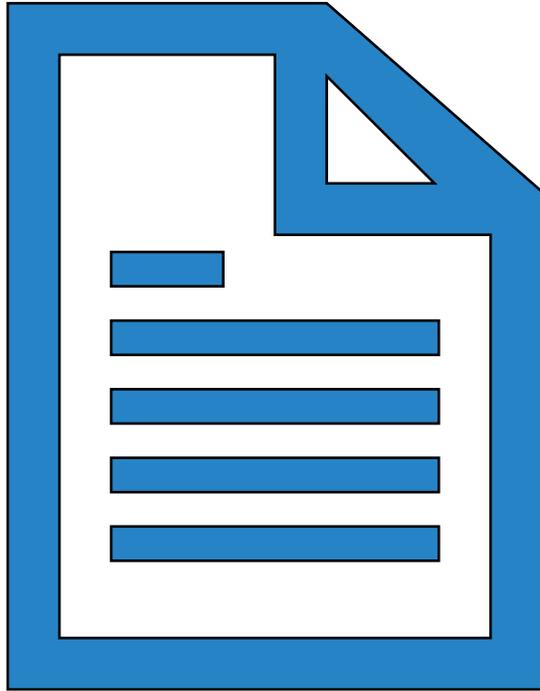
Site Visits - Documentation

USBE Program Offices can associate/link site visits with multiple programs for better coordination between programs

All documentation requested and documents provided are attached directly in Utah Grants

Attachments are to be included as per instructed by site-visit team (prior to audit or during the audit).
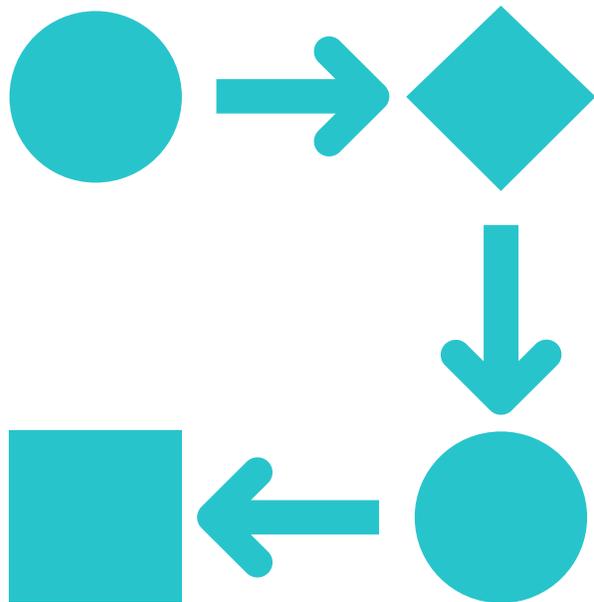
Site Visits - Process

New workflows will take some getting used to. Program Staff and Utah Grants Team can be technical resources.

Program Staff will also be sending communications outside of Utah Grants while ramping-up.

Program Office determines if mandatory to use site visit module or send documentation via other means.

Comprehensive way to notify, document, and report on site visits

Site Visits – Outcomes

Observation

Concern

Finding 1 → Corrective Action Plan → Corrective Action Report → Close

Finding 2 → Corrective Action Plan → Corrective Action Report → Close

Finding 3: No Action Required
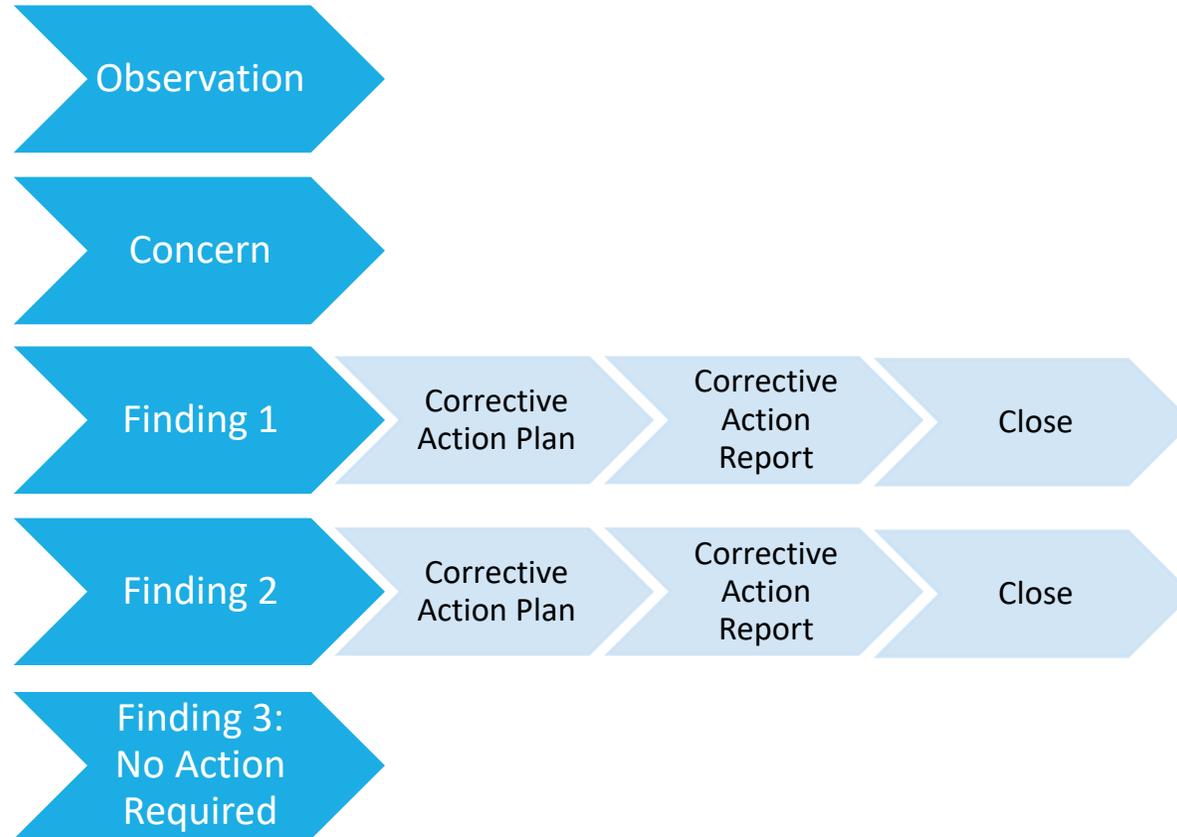
Risk Assessment

New form to be completed as part of SFY-2021 applications

Risk assessments will be used by section staff to determine monitoring activities

Risk Assessment

Risk Assessment Form

Back Save

Fields marked as * are required

▲ Form

*When was your last Fiscal Monitoring Visit by USBE staff? (as of Nov 1)

- ◉ Last fiscal monitoring visit was three or more years ago.
- ○ Last fiscal monitoring visit was between two and three years ago.
- ○ Last fiscal monitoring visit was between one and two years ago
- ○ Last fiscal monitoring visit was within the last year

*Has there been turnover with the Program Director position? (as of Nov 1)

- ◉ Program Director hired/started within the last year.
- ○ Program Director hired/started between one and two years ago.
- ○ Program Director hired/started between two and three years ago.
- ○ Program Director has been in the position for three or more years.

Questions?

Utah Grants Support

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