



Users' Guide



UTAH *grants*



GovGrants[®]
powered by REI Systems



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.

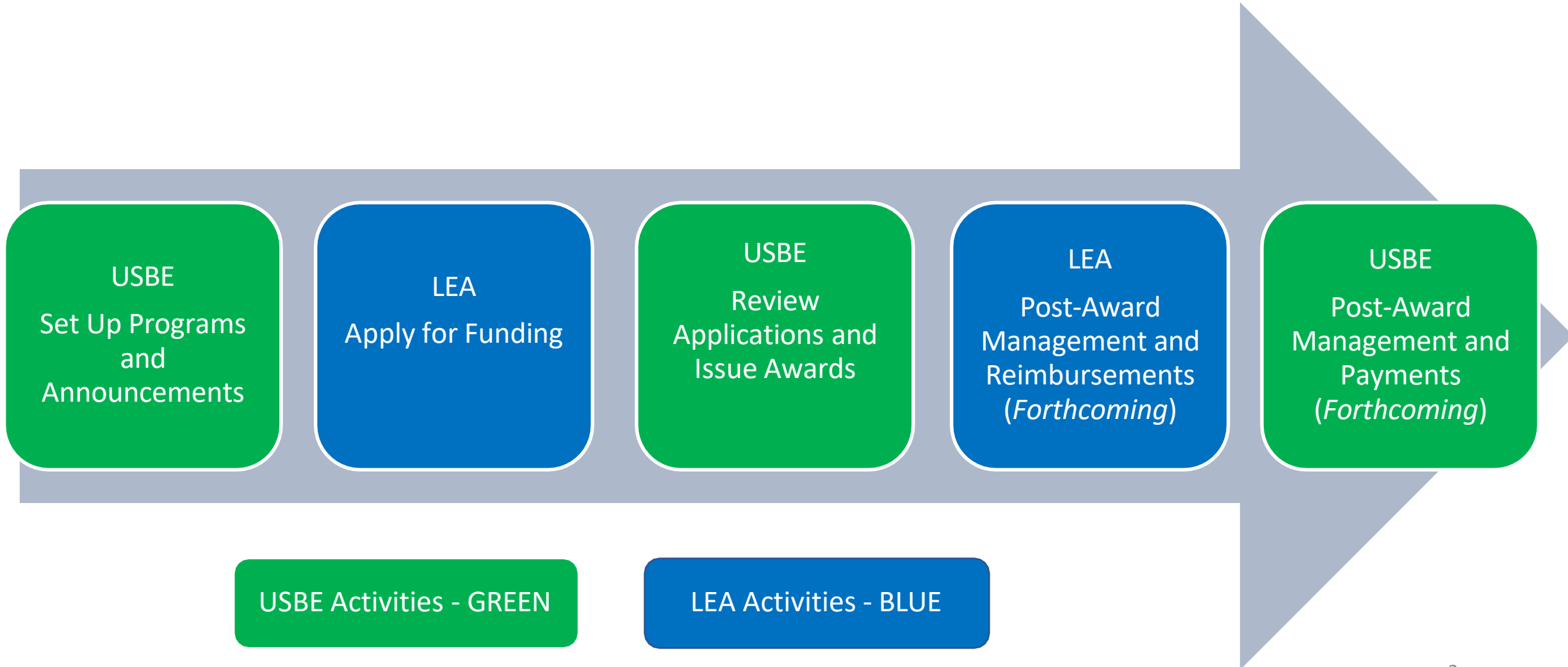
USBE Users

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.

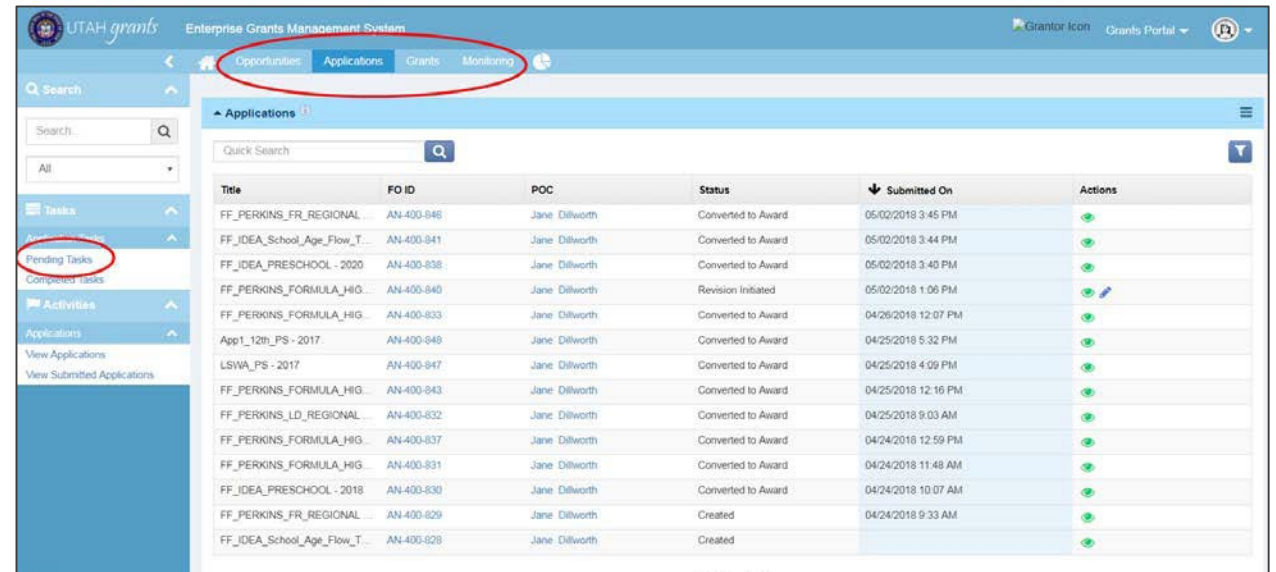
UtahGrants Program Life Cycle



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. <i>Forthcoming</i> – progress reports, desk reviews, and site visits.
Closeout	<i>Forthcoming</i> – 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



View



Edit



Action



Delete



Download



Expand



Preview



Payments



Award



Menu (Download)



Filter



Pull-Down Menu

- **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.

The screenshot displays the UtahGrants Enterprise Grants Management System interface. The top navigation bar includes the UtahGrants logo, the system name, and user information. The main navigation tabs are Opportunities, Applications, Grants, and Monitoring. The left sidebar contains a search bar, a dropdown menu for 'All', and sections for Tasks (Pending Tasks, Completed Tasks) and Activities (View Active Opportunities, View Interested Opportunities, View Closed Opportunities). The main content area is titled 'Active Funding Opportunities' and features a 'Quick Search' bar. Below this, a search filter is applied: 'Announcement Title' contains 'Perkins'. The search results are displayed in a table with columns: Announcement Title, Grantor Organization, FOA Publication Date, App Deadline, and Actions. The table shows four records, all with the same deadline of 08/31/2018 11:14 AM. A blue filter icon is circled in red in the top right corner of the main content area.

Announcement Title	Grantor Organization	FOA Publication Date	App Deadline	Actions
PS_FF_PERKINS_FORMULA_...	USBE	05/18/2018	08/31/2018 11:14 AM	
PS_FF_PERKINS_LD_REGION...	USBE	05/18/2018	08/31/2018 11:14 AM	
PS_FF_PERKINS_FR_REGION...	USBE	05/18/2018	08/31/2018 11:14 AM	
PS_FF_PERKINS_FORMULA_...	USBE	05/18/2018	08/31/2018 11:14 AM	

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

- **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**.

Formula grants (State and Federal) – Created by FinOps. LEAs receive an email and complete a draft 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.

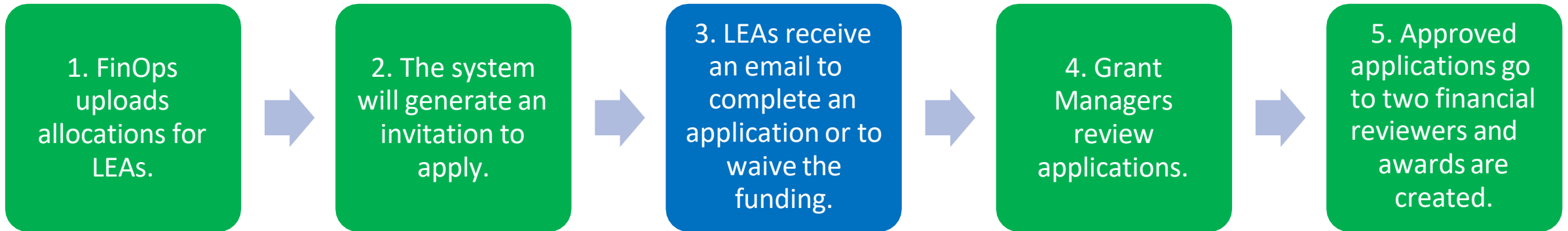
Competitive grants (State and Federal) – Programs are created by FinOps, announcements are created and published by GMs.



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

The screenshot shows the 'Enterprise Grants Management System' interface. On the left sidebar, under 'My Organization Profile', the 'Manage Organization Profile' link is circled in red. In the main content area, the organization 'Box Elder County Attorney' is displayed with details like ID, Status (Active), Registered Date (09/08/2017 12:15 PM), and Parent Organization. An 'Edit' button is circled in red in the top right corner of the organization details section.

The screenshot shows the 'Create Contact' form in the 'Enterprise Grants Management System'. The form includes fields for 'Salutation' (set to --None--), 'Role' (set to --None--), 'Sponsoring Agency' (set to --None--), 'First Name', 'Last Name', 'Email', and 'Phone'. A note at the bottom right states 'Fields marked as * are required'.

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.

The screenshot displays the 'Enterprise Grants Management System' interface. The top navigation bar includes 'UTAH grants', 'Enterprise Grants Management System', and a 'Grants Portal' dropdown. The main navigation menu on the left lists 'Tasks', 'Application Tasks', 'Pending Tasks' (highlighted with a red circle), 'Completed Tasks', 'Activities', 'Applications', 'View Applications', and 'View Submitted Applications'. The 'Applications' tab is selected in the top bar. The 'Pending Tasks (Assigned To M)' section shows a table of applications with columns: Organization Name, Ref. ID, Type, Subject, Created By, and Actions. The first row shows 'ALPINE SCH...' with Ref. ID 'AP-400-082' and Type 'Complete and S...'. The 'Actions' column for this row contains a green play button icon, which is circled in red. Other rows show similar data for 'ALPINE SCH...' and 'SYSTEM'.

Organization Name	Ref. ID	Type	Subject	Created By	Actions
ALPINE SCH...	AP-400-082	Complete and S...	AP-400-082	Jane Dillworth	▶
ALPINE SCH...	AP-400-092	Complete and S...	AP-400-092	Jane Dillworth	▶
ALPINE SCH...	AP-400-093	Complete and S...	AP-400-093	Jane Dillworth	▶
ALPINE SCH...	AP-400-094	Complete and S...	AP-400-094	Jane Dillworth	▶
SYSTEM	TestOneSte...	Revision Request	TestOneStepReviewProg	jonathan chua	▶
ALPINE SCH...	AP-400-120	Complete and S...	AP-400-120	Jane Dillworth	▶
ALPINE SCH...	AP-400-121	Complete and S...	AP-400-121	Jane Dillworth	▶
ALPINE SCH...	AP-400-124	Complete and S...	AP-400-124	Jane Dillworth	▶

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.

External Organization apply for the Funding Opportunity Announcement (FOA) by creating an application. Created application is internally reviewed b...[view more](#)

Overview Budget Attachments History

Opportunity Overview

Funding Opportunity ID ⓘ
AN-400-828

Grantor Organization ⓘ
USBE

Application Deadline ⓘ
6/30/2018 9:03 PM

Application Overview

*Application Title ⓘ
FF_IDEA_School_Age_F

Applicant Organization ⓘ
OGDEN PREPARATORY ACADEMY

*Project Director/Principle Investigator ⓘ
Jane Dillworth

Project Period Start Date ⓘ
7/1/2018

Project Period End Date ⓘ
9/30/2020

Budget Allocation ⓘ
\$30

Submitted By

Submitted On

*Internal Approver ⓘ
[Search]

Substantially Completed Date

Project Abstract

*Project Description ⓘ

[Rich Text Editor]

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.

Application- AB1 - IDEA School Age 2019 - 2020

Waive Application Submit for Approval Clone Application Edit

ID AP-400-1453 Applicant Organization Canyons School District Status Created Days Left 2

External Organization apply for the Funding Opportunity Announcement (FOA) by creating an application. Created application is internally reviewed b...view more

Created Submitted For Approval Internally Approved Submitted to Grantor

Overview **Budget** Attachments History

Information

Budget Allocation \$1,000.63 Remaining Budget \$0 Indirect Cost % 17.49% Indirect Cost Type Unrestricted

Application Budget

Please click the (+) sign below to insert the budget details.

	Support Year	Budget Period	Start Date	End Date	Actions
	BP-01	Fiscal Year(2018-2020)	07/01/2018	03/30/2020	

Proposed Uses of Total Funds Application Budget(10)

#	Expense Type (Expense Code)	Proposed Budget Amount	Actions
1	Salaries (100)	\$500.00	
2	Employee Benefits (200)	\$351.00	
3	Purchased Professional & Tech Services (300)	\$0.00	
4	Purchased Property Services (400)	\$0.00	

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.

Application - AB4_Adult_Basic_Education_English_Language_Learner

Submit for Approval Revise Test Clone Application Edit

ID: AP-400-277 Status: Created Days Left: 2

External Organization apply for the Funding Opportunity Announcement (FOA) by creating an application. Created application is internally reviewed b...view more

Created Submitted to Grantor

Overview \$ Budget Attachments History

Business Forms

Order	Form Name	Form Number	Mandatory	Percentage	Actions
1	MOE Form	MOE-01	✓	0.00%	 
2	LEA Private School Form	LPS-01	✓	100.00%	   
3	General Application Budget Form	AB-001		0.00%	   
4	General Application Cover Page	ACP-02		0.00%	   
5	General Application Education Form	AP-003		0.00%	   
6	CapitolFieldTripGrantApplicationForm	CFTGA-01	✓	0.00%	 

Validate

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.

The screenshot displays the 'Enterprise Grants Management System' interface. At the top, there's a navigation bar with tabs for 'Opportunities', 'Applications' (selected), 'Grants', and 'Monitoring'. A progress bar below the navigation shows four stages: 'Created' (completed with a green checkmark), 'Submitted For Approval', 'Internally Approved', and 'Submitted to Grantor'. Below the progress bar, there are four tabs: 'Overview', 'Budget', 'Attachments' (selected), and 'History'. The 'Attachments' section is divided into two main areas: 'Attachments From Grantor' and 'Attachments For Grantor'. The 'Attachments From Grantor' section contains a table with one row: 'Application.docx' under 'Attachment Name', 'Mandatory Document Placeholder' under 'Classification', and 'View Attachment' under 'Attachment URL'. The 'Attachments For Grantor' section has an 'Add' button and a table with columns: 'Attachment Name', 'Type', 'Description', 'Last Modified', 'Owner', and 'Action'. Below this table, it says 'No records found'. There is also a 'Notes' section at the bottom with columns: 'Title', 'Description', 'Created Date', and 'Attached By', also showing 'No records found'.

Attachment Name	Classification	Attachment URL
Application.docx	Mandatory Document Placeholder	View Attachment

Attachment Name	Type	Description	Last Modified	Owner	Action
No records found					

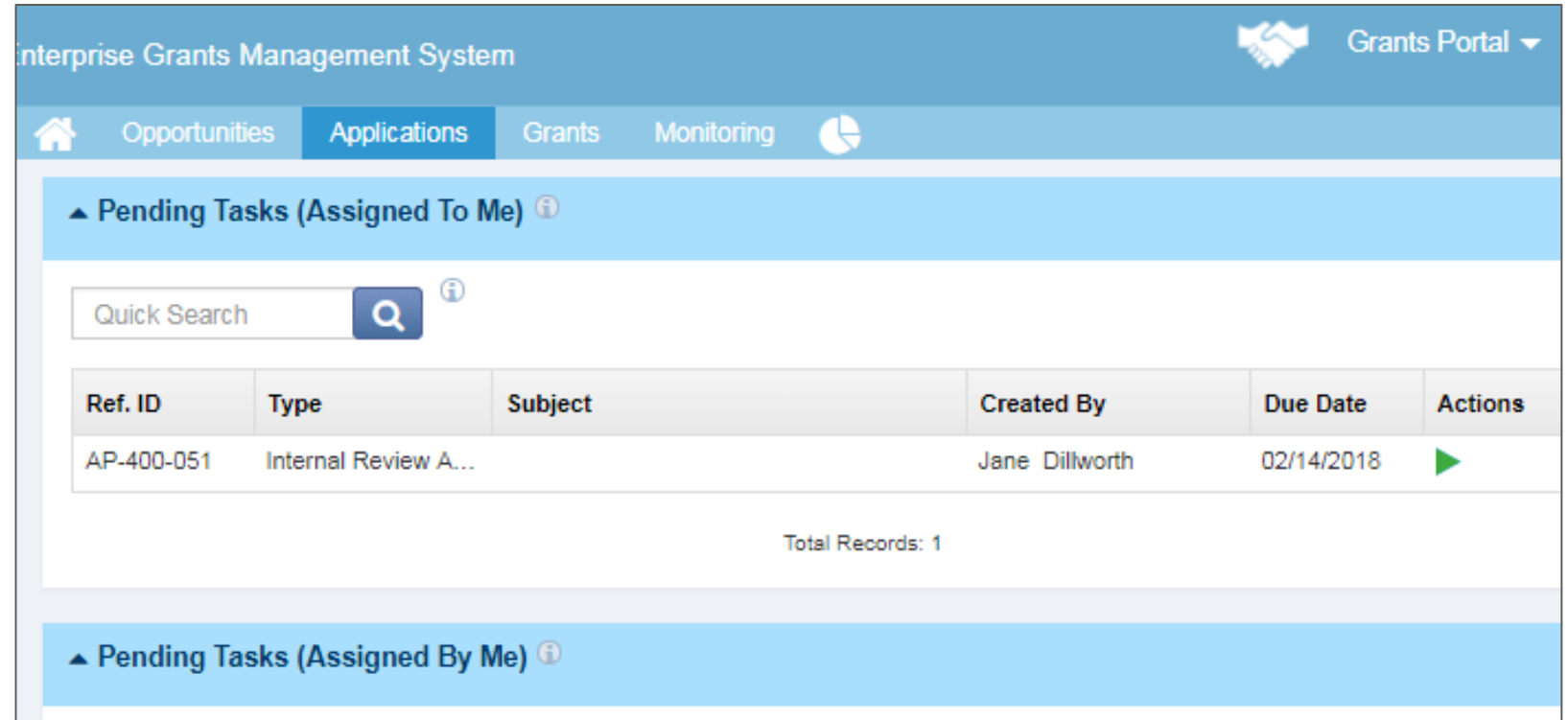
Title	Description	Created Date	Attached By
No records found			

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**.



The screenshot displays the 'Enterprise Grants Management System' interface. At the top, there is a navigation bar with the title 'Enterprise Grants Management System' and a 'Grants Portal' dropdown menu. Below this is a secondary navigation bar with tabs: 'Opportunities', 'Applications' (which is selected), 'Grants', and 'Monitoring'. A pie chart icon is also present in this bar. The main content area is titled 'Pending Tasks (Assigned To Me)'. It features a 'Quick Search' input field with a magnifying glass icon. Below the search field is a table with the following columns: 'Ref. ID', 'Type', 'Subject', 'Created By', 'Due Date', and 'Actions'. The table contains one record with the following data: 'Ref. ID' is 'AP-400-051', 'Type' is 'Internal Review A...', 'Subject' is empty, 'Created By' is 'Jane Dillworth', 'Due Date' is '02/14/2018', and 'Actions' contains a green right-pointing triangle icon. Below the table, it says 'Total Records: 1'. At the bottom of the screenshot, there is another section titled 'Pending Tasks (Assigned By Me)'.

Ref. ID	Type	Subject	Created By	Due Date	Actions
AP-400-051	Internal Review A...		Jane Dillworth	02/14/2018	

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.

UTAH grants Enterprise Grants Management System

Grants Portal

Opportunities Applications Grants Monitoring

Search

Search...

All

Tasks

Pending Tasks

Completed Tasks

Activities

Pre-Applications

View Pre-Applications

View Submitted Pre-Applications

Opportunities

View Active Opportunities

View Interested Opportunities

View Closed Opportunities

Interested Funding Opportunities

Quick Search

ID	Title	Grantor Organization	FOA Publication Date	Application Deadline	Status	Actions
AN-400-016	March_3_15	USBE	2018-03-15	03/31/2018 1:41 PM	Submitted t...	
AN-400-014	PS_CN	USBE	2018-03-14	03/31/2018 11:47 AM	Converted t...	
AN-400-015	PS_CN	USBE	2018-03-14	03/31/2018 11:47 AM	Submitted t...	
AN-400-013	TEST_3_14	USBE	2018-03-14	03/17/2018 1:12 PM	Submitted t...	

Total Records: 4

Interested Closed Funding Opportunities

Quick Search

ID	Title	Grantor Organization	FOA Publication Date	Application Deadline	Status	Actions
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No records found

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.

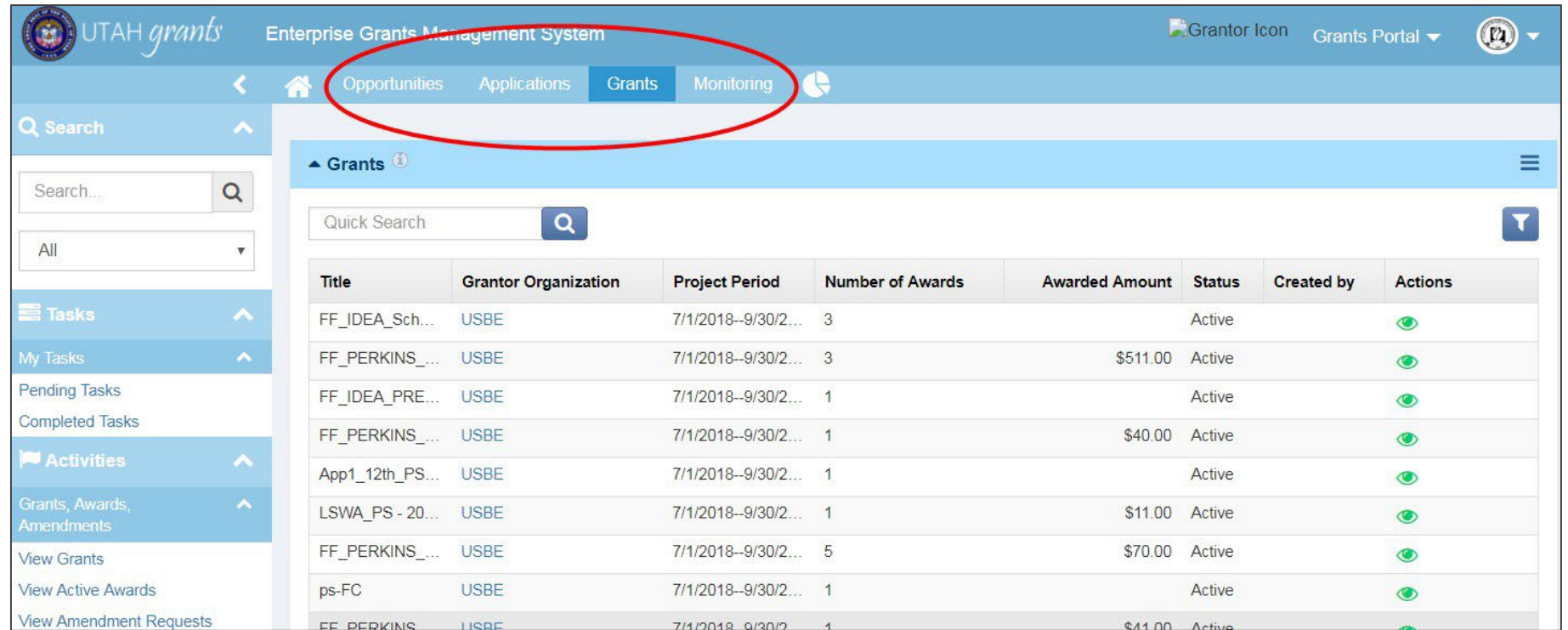
The screenshot displays the 'Grants' tab in the Post Award Management system. The 'Grants' tab is highlighted with a red circle. Below it, the 'Awards' sub-tab is also highlighted with a red circle. The 'Awards' sub-tab shows a table of awards with columns: #, ID, Title, Grantor Organization, Budget Period, Awarded Amount, Status, and Actions. The first row shows an award with ID AD-P0426--00, Title FF_PERKINS_FORM..., Grantor Organization USBE, Budget Period 7/1/2018--9/30/2020, Awarded Amount \$311.00, Status Activated, and a green eye icon in the Actions column, which is circled in red.

Below the Awards table, there is an 'Award Contacts' section with a search bar and a table of contacts. The table has columns: #, Name, Type, Role, Organization, Email, Phone, and Actions. The first row shows a contact named Jane Dillworth, Recipient, Recipient/KeyPoc, OGDEN PREPARATORY..., utahegms@gmail.com, 2341234567, and a green eye icon in the Actions column. The second row shows a contact named Leah GM, Internal, Grants Manager, USBE, utahsuper@reisystems.c..., and a green eye icon in the Actions column.

Below the Award Contacts section, there is an 'Award FINET Code' section with a 'New' button and a table of FINET codes. The table has columns: PROGRAM CODE, OBJ CODE, Total FINET Program Funds, Amount, Remaining Amount, and Actions. The first row shows PROGRAM CODE PS04092018, OBJ CODE 6128, Total FINET Program Funds \$99,999,462.04, Amount \$311.00, Remaining Amount \$311.00, and a green eye icon in the Actions column, which is circled in red. The second row shows the Total, with Amount \$311.00 and Remaining Amount \$311.00.

Next Steps... 😊

- Payment Requests
- Budget Revisions
- Post-Award Monitoring
 - Progress Reports
 - Site Visits
 - Desk Reviews
- Closeout
 - Termination
 - Closeout



UTAH grants Enterprise Grants Management System

Grantor Icon Grants Portal

Opportunities Applications **Grants** Monitoring

Search

Search... Q

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Grants, Awards, Amendments

View Grants

View Active Awards

View Amendment Requests

Quick Search Q

Title	Grantor Organization	Project Period	Number of Awards	Awarded Amount	Status	Created by	Actions
FF_IDEA_Sch...	USBE	7/1/2018--9/30/2...	3		Active		👁
FF_PERKINS_...	USBE	7/1/2018--9/30/2...	3	\$511.00	Active		👁
FF_IDEA_PRE...	USBE	7/1/2018--9/30/2...	1		Active		👁
FF_PERKINS_...	USBE	7/1/2018--9/30/2...	1	\$40.00	Active		👁
App1_12th_PS...	USBE	7/1/2018--9/30/2...	1		Active		👁
LSWA_PS - 20...	USBE	7/1/2018--9/30/2...	1	\$11.00	Active		👁
FF_PERKINS_...	USBE	7/1/2018--9/30/2...	5	\$70.00	Active		👁
ps-FC	USBE	7/1/2018--9/30/2...	1		Active		👁
FF_PERKINS...	USBE	7/1/2018--9/30/2...	1	\$41.00	Active		👁

UtahGrants Support

For Support Email or Call USBE at:

801-538-7604

utahgrants@schools.Utah.gov



UTAH *grants*



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