Discretionary Grant Web Portal Overview: Submitting IDEA Grant Applications and Budgets

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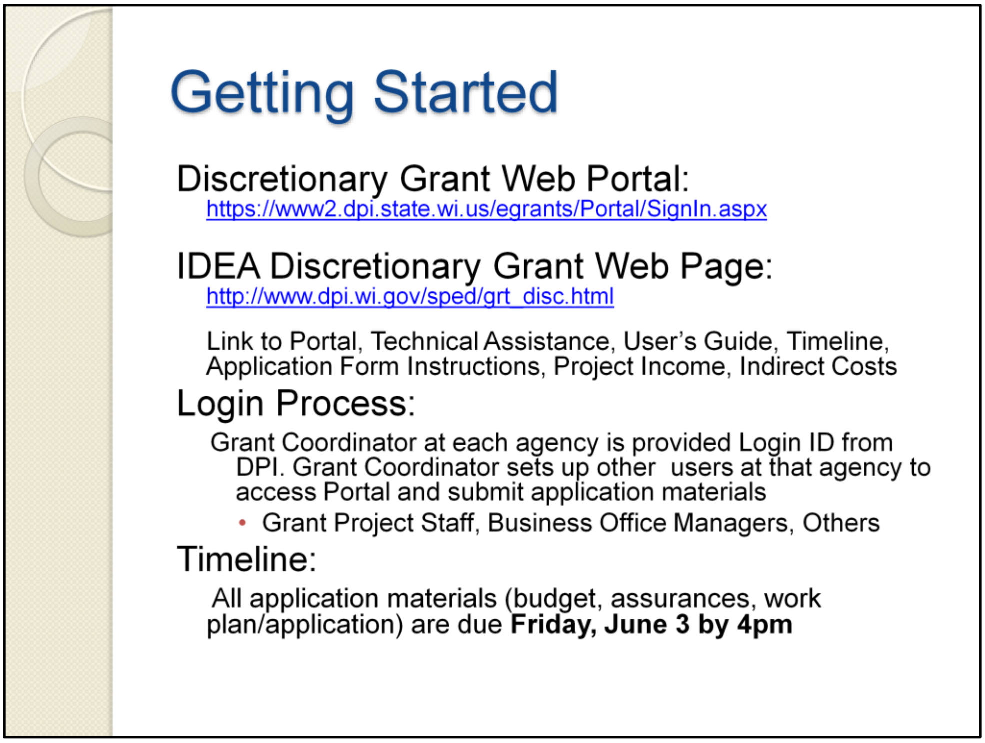
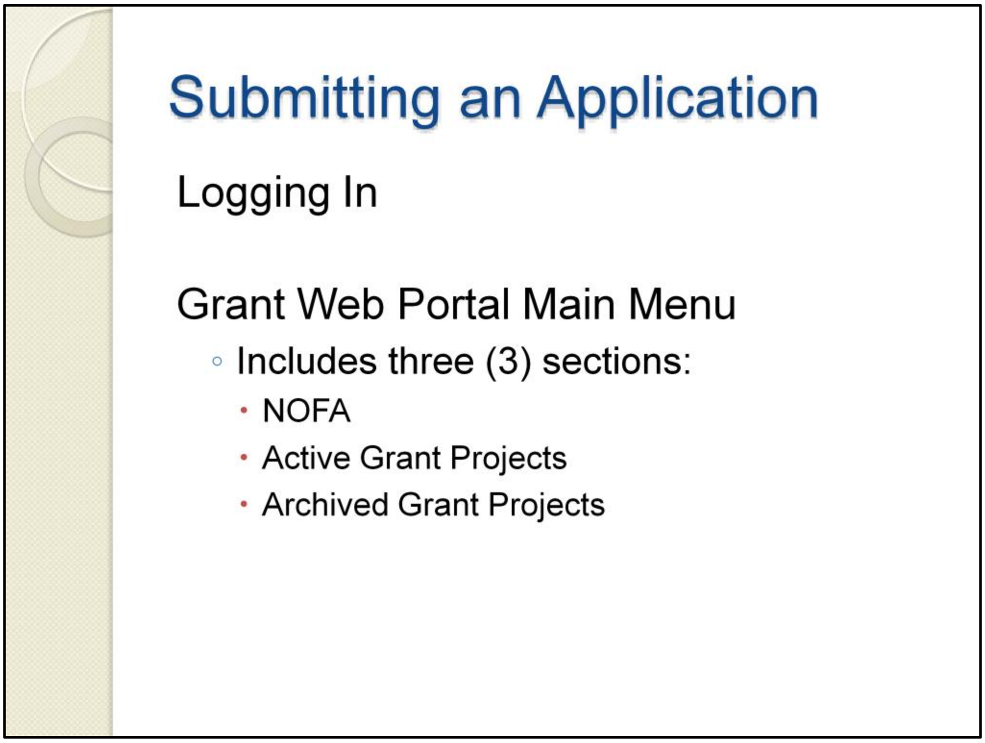
•Introduction
•The purpose of this webinar is to introduce applicants to the Portal and demonstrate how to submit application materials, including uploading work plan, assurances and submitting a budget.



- Review some important websites and documents, including:
  - Web address for the Discretionary Grant Web Portal
  - IDEA Discretionary Grant web page on DPI website. This includes a link to Portal, updated timeline, Technical Assistance section with User's Guide, Application Form Instructions, Indirect Costs and Project/Program Income technical assistance documents.

- I will be following along with the User's Guide and referencing pages as we go along .
- Regarding the the Login Process: one individual at each CESA or fiscal agency has been designated as a "Grants Coordinator." This person has been provided a Login ID and password from DPI.
- This person is responsible for setting up all other users at the fiscal agency to access the Portal and submit application materials. This will likely be grant project staff and business office managers at that agency.
- In terms of the timeline, remember that all grant application materials must be submitted via the Portal by 4pm on Friday, June 3rd.
- The Discretionary Grant Web Portal structured similar to Special Education Portal for LEAs.



•First, we'll open to User's Guide. We'll assume that the Grants Coordinator has been able to login and set up other users and provide them with a unique LOGIN and PASSWORD, so we'll skip pages 3 to 6 and go directly to page 7.
•Page 7 has instructions about logging in to the Portal.
•So we'll go to the Portal address, and this brings up the Portal login page entitled "Discretionary Grant Web Portal Login Page."
•Now I'll login using an example user.
•Note that first time you login, you will be asked to change your password.
•You will see this screen upon logging in, entitled "Grant Web Portal Main Menu" (Page 8)
•This is the main menu page for your fiscal agency, such as CESA 1. This page will list all the grant projects for which your agency is eligible to apply. The fiscal agency name is listed at the top (in this case it's DPI).
•This page is divided into 3 sections:
  - •#1: NOFA at the top is the area where the grant projects will be listed when they are still in the application stage, when they have not yet been approved. You'll see two projects listed here as an example.
  - •See the name of the project with a hyperlink. Underneath is the project number, start date, end date, and total award amount
  - •#2: Once the applications have been approved, the Grant Award Notifications sent, and the grant project period begins (for most grants, this is July 1st), then the grant project will become active and move down to this second section entitled "Active Grant Projects"
  - •#3: Finally, when the grant period has ended (June 30), the grant project information will be moved to the third section, entitled "Archived Grant Projects". This way DPI and the grantee will be able to easily view past grant information

Submitting an Application

Sidebar

Includes two (2) sections:

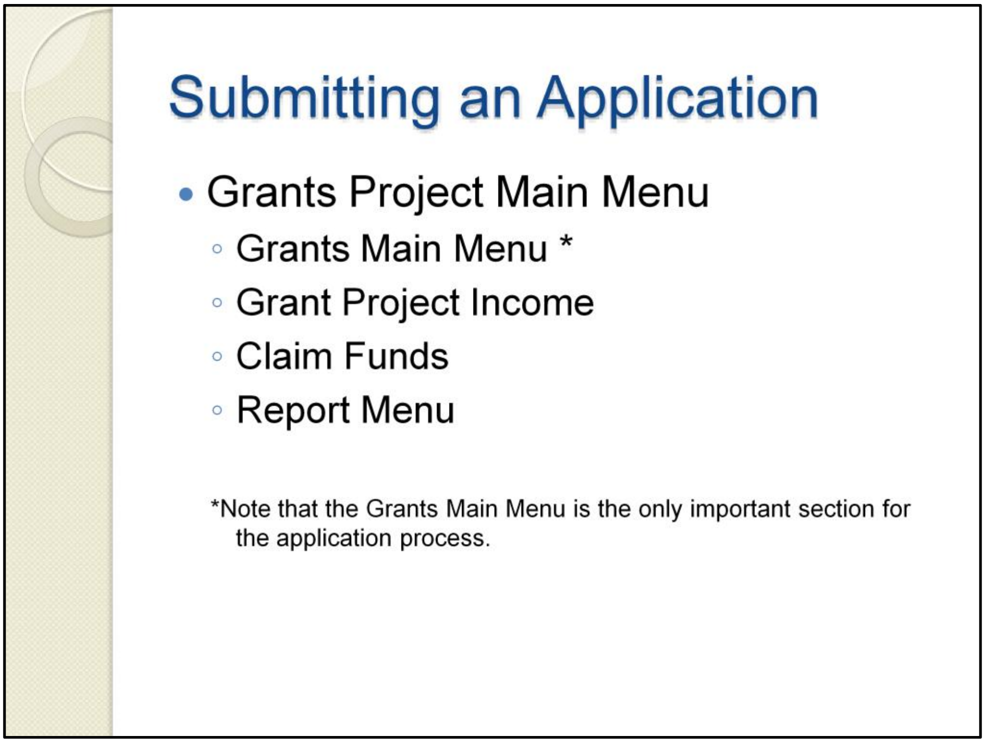
1.) User Info

2.) User Administration
(add user, update user, reset password, re-activate user)

I also want to bring your attention to the sidebar on the left hand side of the screen.

-Grants Coordinator will be able to see two sections: User Info and User Administration. User Info simply gives the User’s name, login ID and role. Check to make sure this information is accurate. Underneath that will be “User Administration.” This is where the Grants Coordinator will be able to add other users for that fiscal agency, update user information, re-set passwords, and activate or de-activate users.

-The Grants Project Director and other users will only be able to see the “User Info” area, not the “User Administration.”



Click on the project title .
This will bring us to the next screen. I call it the Grants Project Main Menu, even though that's not what you see up at the top here. (page 10)
This page is specific to each grant project.
-There are 4 important areas for the grantee,

1. Grants Main Menu
2. Grant Project Income
3. Claim Funds
4. Report Menu

For the purpose of submitting the application, the only part you will need to be concerned with is the very first– Grants Main Menu. The other sections won't be accessible to you until AFTER the grant has been awarded and the grant period begins in July. The Report Menu will allow you to see the entire budget and print out a hard copy if needed. I will briefly talk about these other two sections, Grant Project Income and Claim Funds, but so as not to confuse you, the focus of this webinar will be only on submitting an application.

Submitting an Application

- Grants Main Menu
  - Grant Budget
  - NOFA
  - View Work Plan
  - View Assurance
  - Upload Complete Assurance/Work Plan*
  - Enter View Project Contacts

Now under the Grants Main Menu (page 11)
You'll see a total of 6 links:

-Grants Budget is where you go to actually develop and submit your budget

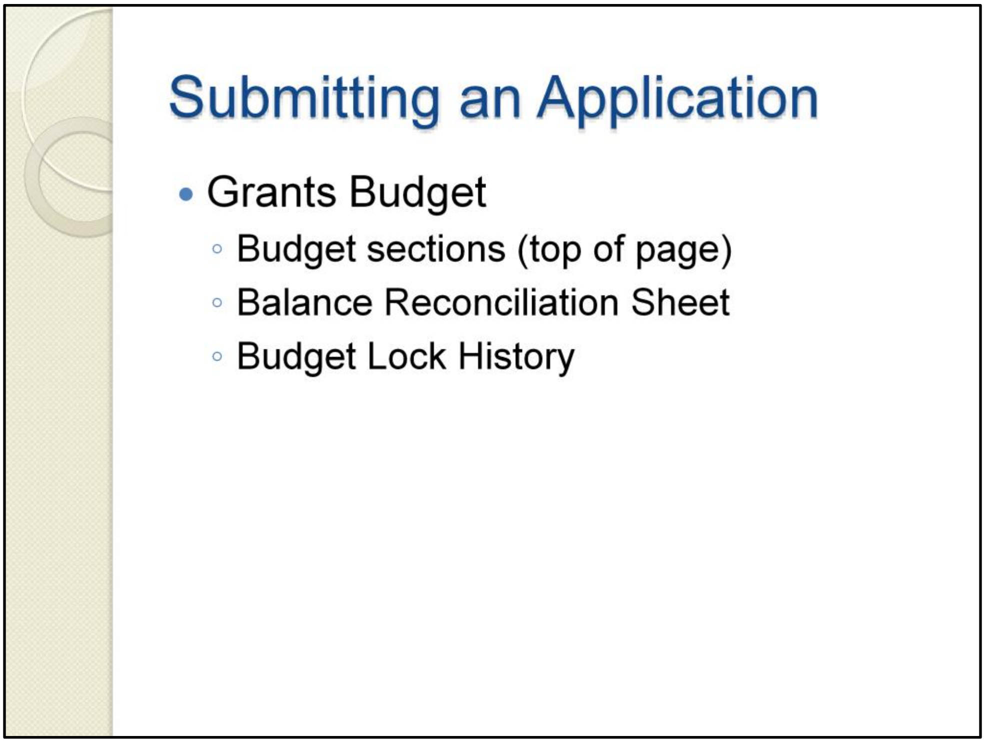
-NOFA is where you can download your project's NOFA in PDF format

-You can go to "View Work Plan" to download a blank copy in WORD of the work plan application

-You can go to View Assurance to download a blank copy in WORD of the assurances document

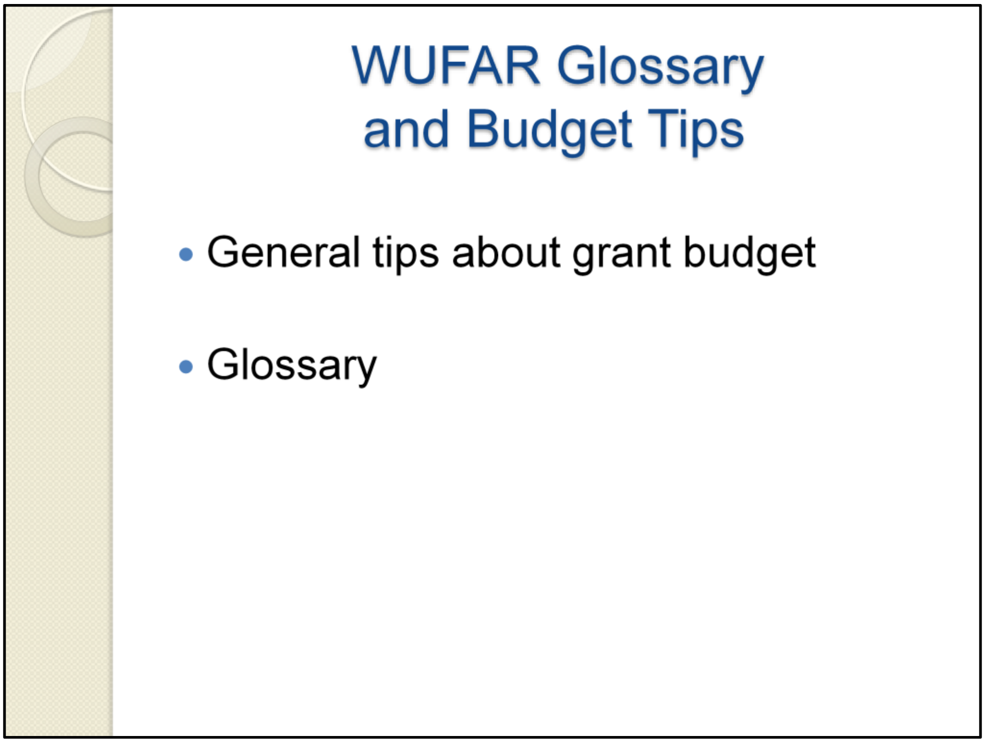
-Most importantly, go to "Upload Complete Assurance/ Work Plan." This is where you will actually upload the completed work plan and assurances documents…..

-Finally, let's go back to "Enter View Project Contacts." Here anyone can designate certain users as either the Grants Coordinator or Accountant for that project. Just choose from the drop down list and select a user that has already been given access to that Fiscal Agent's page. The contact information for that person will then populate automatically.



So we’ll move on to page 14 in the user’s guide.
Click on the “Grants Budget” link and this will bring you to a page entitled “Grant Budget”.

You can see how this page is structured with the budget sections or categories listed at the top, the balance reconciliation sheet in the middle of the page, and the budget lock (submission) history at the bottom.



Before we begin to enter items in to the budget, note that the way this budget software is structured is a little different than the excel version of your budget.

-Each grant project will be limited in terms of the positions, services or objects available in each drop down menu.
-Certain grant projects may have some options and not others depending on what is allowable for that projects.
-If you're finding that you need an additional position, service or object added to the budget, then you can contact me directly to discuss.
-You may find that you need to restructure things a little from the budget you prepared in the excel document so that your budget conforms to the software

-The web portal software now requires many objects and services to be broken down and listed separately, such as workshop, conference, training and meeting costs. Travel must be separated out according to project staff, consultants or participants.
-A detailed description is required for most services and objects.
-The more detail provided to explain what is being purchased, the better.
-A good rule of thumb is to provide enough information in the detailed description so that an individual not intimately familiar with the project would be able to understand what is being purchased.

-On page 45 you'll see a full glossary of the WUFAR options for each section of the budget. This includes a short explanation of each position, service and object. If you're confused about any item in the budget, first refer to this glossary.

Submitting an Application

- Budget sections
  - Personnel
  - Purchased Services
  - Non-Capital Equipment
  - Capital Equipment
  - Insurance
  - Other Objects
  - Indirect
  - Summary Report

Now we'll review each section (or category) of the grant budget.

Submitting an Application

- Submitting Grant Budget
  - “Lock Budget”
  - Budget Lock History
  - Next steps – Liaison review

Once the budget has been completed, click the “Lock” button to submit. “Lock” means “submit.” Once this button is clicked, you will no longer be able to make changes to the budget. During the review process, the DPI liaison may “unlock” the budget for you to go and make any necessary revisions.

Submitting Information After the Grant Project Is Awarded

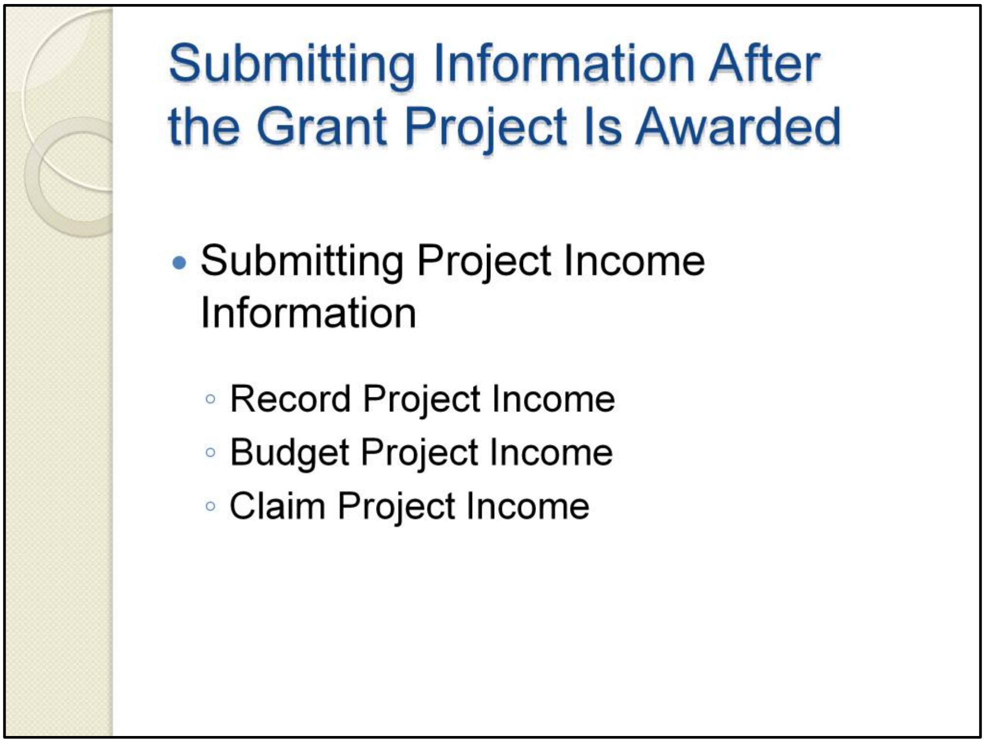
- Submitting Work Plan revisions

See page 44 in the User's Guide

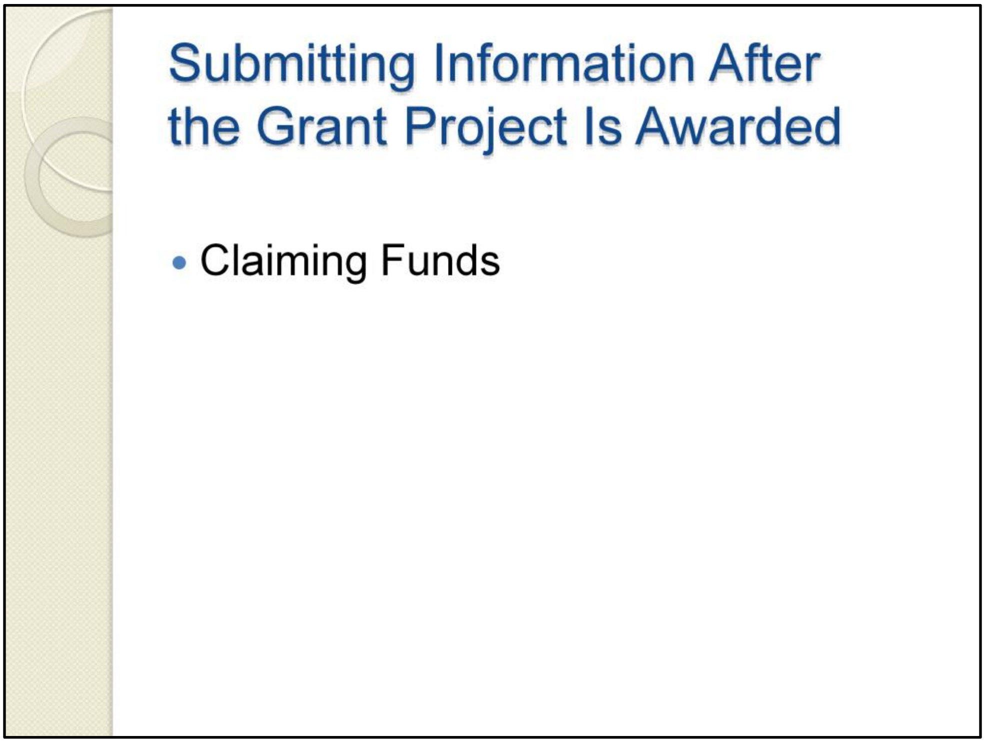
Submitting Information After the Grant Project Is Awarded

- Submitting budget revisions
  - Negotiated indirect rate adjustment

See page 42 in the User's Guide.



The Project Income section will not be activated until the grant has been awarded and the grant period begun. A subsequent webinar will be given in July that will cover this part in detail. For now, see page 35 in the User's Guide.



The Claims section will not be activated until the grant has been awarded and the grant period begun. A subsequent webinar will be given in July that will cover this part in detail. For now, see page 29 in the User's Guide.

Important Contacts and References

- Indirect Costs
- Time and Effort Reporting
- Project Income
- Procurement and Contracts – coming soon
- Fiscal Agency Policy
- Financial management handbook
- Contacts

See page 50 in the User’s Guide

Questions?