



State of Oregon  
Department of  
Environmental  
Quality

**OREGON DEPARTMENT OF ENVIRONMENTAL QUALITY**

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***GRANT MANAGEMENT SYSTEM***

**GMS User Manual Document**

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## 1. INTRODUCTION

The **Grant Management System (GMS)** is a web based application that provides a complete solution for managing and tracking of grants, which are issued every year by **Oregon Department of Environmental Quality (DEQ)** to various entities that come under its jurisdiction. The GMS application will help DEQ personnel to manage their entire grants process effectively – right from issuing grant notification, receiving applications for a grant, rounds of application evaluations, and finally awarding the grant to a selected applicant/grantee. Besides being able to carry out the complete grants management process, the GMS application shall also allow DEQ personnel to store historical information of all the grants processed and the corresponding applications received for each such grant.

## 2. SCOPE

The scope of this user manual is to train DEQ personnel to help them understand functionality of the GMS application, so that they are able to perform all their activities regarding grants management via the portal.

## 3. USER ROLES

Below is a list of available user roles in the GMS portal:

- ◆ Applicant/Grantee
- ◆ Program Staff
- ◆ Program Lead
- ◆ Program Manager
- ◆ Procurement Manager
- ◆ Reviewer
- ◆ Legal Reviewer
- ◆ Grant Administrator
- ◆ System Administrator



**The level of access provided to each user role and the responsibilities assigned to them can be configured in the GMS portal by Administrator.**

## 4. PUBLIC PAGE

The **Public Page** of DEQ GMS shall be the gateway to the GMS portal and shall display a list of its *Programs*, along with corresponding *Grants* under those programs. It also provides an option to public users to register themselves in the GMS portal. Existing users can login to the GMS portal from the public page as well.

The screen below displays the public page of Oregon DEQ GMS portal.





There are four tabs provided on the public page (highlighted in above screen shot):

- ◆ **All** – This is the default selection on the public page. With this selection, the public page shall display all the Programs, Grants and options to Login/Register/Reset Password. A user shall have to scroll down on this page to see all the options.
- ◆ **Programs** – Clicking on *Programs* button shall display all the available programs under DEQ, along with a brief description about them. Clicking on any program shall direct a user to the login page.
- ◆ **Grants** – Clicking on *Grants* button shall display all the grants, along with the name of the program under which they fall and the due date to apply for them. Clicking on any grant shall direct a user to the login screen.



- ◆ **Join** – Clicking on *Join* button shall display the following options to a user - Login, Register, or Reset Password of his/her account.

Details regarding the icons provided in the right side of the header:

Icon	Functionality
	Login icon: Clicking on this icon shall direct a user to the login page.
	Register icon: Clicking on this icon shall direct a user to the registration page.

## 5. REGISTER

Clicking on the **Register** button/icon from the public page shall display the below page to a user. A user can enter his/her details on this page and click on **Register** button to complete registration into GMS portal. Clicking on **Cancel** button shall redirect a user back to public page.

### Register

Required Fields (\*)

<b>Username*</b> <input type="text"/>	<b>Password*</b> <input type="password"/>	<b>Confirm Password*</b> <input type="password"/>
<b>First name*</b> <input type="text"/>	<b>Last name*</b> <input type="text"/>	<b>Email*</b> <input type="text"/>
<b>Mobile Number*</b> <input type="text"/>	<b>Address*</b> <input type="text"/>	<b>City*</b> <input type="text"/>
<b>State*</b> <input type="text" value="---Select---"/>	<b>County*</b> <input type="text" value="---Select---"/>	<b>Zipcode*</b> <input type="text"/>
<b>Organization</b> <input type="text"/>	<b>DUNS Number</b> <input type="text"/>	



Fields marked with red asterisk are mandatory.

## 6. LOGIN PAGE

Click on the **Login** button/icon from the public page to log into the GMS portal. A login page to GMS portal shall be displayed as shown below.

### Login

A screenshot of the login page. It features a white rectangular box containing two input fields. The top field is labeled "Username" and the bottom field is labeled "Password". Below these fields is a red rounded rectangular button with the text "Login" in white.

Forgot Password



- ◆ Enter the **Username** and the **Password** in the fields provided.
- ◆ Click on **Login** button to sign into the GMS portal.
- ◆ Click on **Forgot Password** button to retrieve/reset a forgotten password.

After logging into the GMS portal, a user shall see the following **Main Modules** in the header:

- ◆ Dashboard
- ◆ Diary
- ◆ Programs
- ◆ Grants
- ◆ Applications

- ◆ Reviews
- ◆ Awards
- ◆ Deliverables
- ◆ Invoices
- ◆ Funding
- ◆ Payments
- ◆ Reports



**Not all main modules may display in the GMS portal for a user role. Access to individual main modules for a user role shall be configured by Administrator.**

## 7. RESET/FORGOT PASSWORD

Click on **Forgot Password** button/icon from the public page to reset a forgotten password. Clicking on this link shall display the below page.

### Forgot Password

Forgot your password?

Enter your email address below, and we'll email instructions for setting a new one.

- ◆ Enter the email address used for registering into GMS portal in the text field provided.
- ◆ Click on **Submit** button to receive an email to the registered email address with password reset instructions.
- ◆ Click on **Cancel** button to cancel the process and return to public page or login page.

## 8. DASHBOARD MODULE

The **Dashboard** module is the default landing page when a user logs into the GMS portal. Below screen shot displays what a user shall see when they log into the portal.

**Oregon Department of Environmental Quality**  
Grant Management System

Test Admin  
Username: testadmin  
Role: System Administrator  
Date: Jul 22, 2020

Home Dashboard Diary Programs Grants Applications Awards Deliverables Invoices Funding Payments Reports

### Dashboard

Search:

#### Programs

Total: 28

Program	Department	Start Date	End Date
Applications	Federal Department	July 22, 2020	July 31, 2020
Test	Federal Department	July 22, 2020	July 31, 2020
Bglobal Schools Program	Bglobal Dept	July 21, 2020	July 31, 2020

Show More

#### Grants

Total: 34

None	0
Draft	6
Review	0
Approve	0
Approved	9
Active	12
Inactive	3
Closed	4

#### Applications

Total: 39

None	0
Full Application Draft	9
Full Application Submitted	2
Reviewed	0
Approved	15
Declined	1
inactive	5

#### Funding

Total: 38

Grant/Application/Funding	Method/Amount(\$)/Date
	Cash 1,000 July 30, 2020

Show More

#### Awards

Total: 33

Grant/Award	Awardee	Date
School Grant School Award	Gantl Foundation	July 22, 2020

Show More

#### Deliverables

Total: 28

Award	Deliverable	Amount(\$)	Due	Status
Ub Award	Ub Deliverable	0	July 22, 2020	active

Show More

#### Payments

Total: 17

Invoice	Payment	Budget(\$)	Method	Date
Ub Invoice	99,000	9,000	Cash	July 16, 2020

Show More

#### Invoices

18

Invoice Name	Deliverable	status
UB Invoice	UB Deliverable	paid

Show More

#### Pending Reviews







127

Review Name	Assigned To
	Admin WAB

Show More

The top banner of the application displays the following information:

- ◆ Oregon Department of Environmental Quality logo
- ◆ Name of the organization & application – *Oregon Department of Environmental Quality; Grant Management System.*
- ◆ On the right side, information regarding the user logged into the GMS portal is displayed, i.e. name of the user logged in, user name, user role, and date.
- ◆ Besides the user information, we have four icons which are:

Icon	Functionality
	Profile icon: Click on this icon to go to the user profile page.
	Dashboard icon: Click on this icon to go to the Dashboard page.
	Settings icon: Click on this icon to go to the site settings page.
	Help icon: Click on this icon to open User Manual.
	Tech Support icon: Click on this icon to open tech support page from where a user can send any technical support question.
	Logout icon: Click on this icon to log out of the GMS portal.

The secondary banner (below the top banner) displays the various **Main Modules** available in the GMS portal. The access to these main modules shall depend upon the permissions provided to a user role.

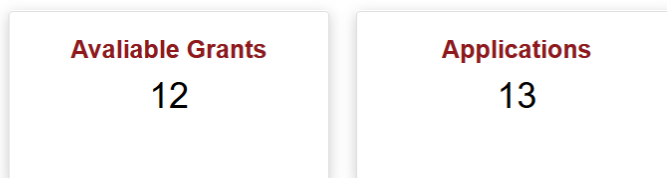
- ◆ The Dashboard page displays various tiles which provide a snap shot or high-level overview, in a grid format, about *Programs, Grants, Applications, Funding, Awards, Deliverables, Payments, Invoices, and Pending Reviews.*
- ◆ Clicking on any of the tile header from the Dashboard page shall direct a user to that particular module in the GMS portal.
- ◆ Click on **Show More** button (highlighted in above screen shot) given in any tile to display more records in grid format.
- ◆ A user can click on any of the link (highlighted in red in the grids) provided in the tiles to go to that particular page in the GMS portal.

For example – clicking on **Draft** link under *Grants* tile shall take the user to the Grants module with records pre-filtered based on grant status set as “Draft”.

**Note:** A user shall see only those tiles on the Dashboard page that are configured for his/her user role. For example – an Applicant shall see his/her Dashboard page as shown below.



## Dashboard



- ◆ Clicking on **Available Grants** in the first tile shall direct the Applicant to the Grants module of the GMS portal.
- ◆ Similarly, clicking on **Applications** in the second tile shall direct the Applicant to the Applications module of the GMS portal.



The information displayed on the Dashboard page can be configured for each user role.

## 9. DIARY MODULE

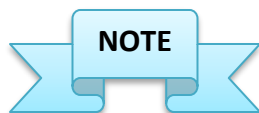
The **Diary** module allows a user to view the grant applications that are under process in a calendar view. Below is the screen that is displayed when a user clicks on this module from the main header.

## Diary

The screenshot displays the GMS Diary interface for June 2020. On the left, there is a 'Left Menu' containing a 'Mini Calendar' for June 2020, filter dropdowns for 'Program', 'Grant', and 'Award', and a 'Color Legend' with five categories: Applications Past Due Date (red), Unassigned (cyan), Assigned under process (orange), Awaiting Award (green), and Awarded (yellow). A 'Search' button is positioned at the bottom of the left menu. The main diary grid shows a weekly view of grant applications, with each entry color-coded according to its status. For example, 'Clinical trials for' is cyan, 'App for Ab Gran' is orange, and 'demo app 6/19/' is yellow.

The options in the **Left Menu** are explained below:

- ◆ The **Mini Calendar** allows a user to select a particular day/month/year and display the same in the main Diary page.
- ◆ The **Program**, **Grant** and **Award** drop-down values can be used to filter out the grant applications for a particular month. Select values from these drop-downs and click on **Search** button provided at the bottom to filter the records in the diary based on selected values.  
**Note:** The access to drop-downs in the left menu can be configured for a particular user role by the Administrator.
- ◆ The **Color Legend** in the left menu explains what individual colors used to highlight grant applications in the diary mean regarding the status of those applications.



**The different colors used to highlight a grant application in the diary indicate the status of the application in the grant application processing workflow.**

Hovering over a grant application in the diary shall display a fly-out with brief information regarding that particular grant application as shown below.

**Diary**


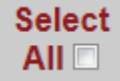
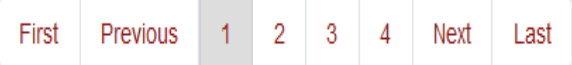







The screenshot displays the 'Diary' interface for June 2020. On the left, there is a sidebar with a calendar for June 2020, a 'Program' dropdown set to 'Human department dev', a 'Grant' dropdown set to '---Select---', and an 'Award' dropdown. Below these are color-coded status indicators: Applications Past Due Date (red), Unassigned (cyan), Assigned under process (orange), Awaiting Award (green), and Awarded (yellow). The main area shows a monthly calendar grid with various grant applications listed as colored blocks. A mouse cursor is hovering over a 'Charity SSC' application on Tuesday, June 9th, which has triggered a fly-out tooltip. The tooltip contains the following information: Application Number: GMS-2020-06-07-113620, Application Name: Charity SSC, Program Name: SSC Charity, Grant Name: Save Street Children, Organization Name: Save Street Children, and Status: Full Application Draft. Navigation controls at the top include left and right arrows, a 'today' button, the month 'June 2020', and view options for 'day', 'week', and 'month'. Two green arrows point to the left and right navigation arrows.




- ◆ Click on the side arrows (highlighted in above screen shot) to move to previous or next months in the diary.
- ◆ Click on **today** button (highlighted in above screen shot) to go to the current month in the diary.
- ◆ The default view of the diary is **monthly** view. To switch views, a user can click on **day** or **week** options (highlighted in above screen shot) to change the diary view accordingly.



## 10. COMMON GRID FEATURES

The table below provides a list of **Features** that are common in all grids across the GMS portal.

Icon/Feature	Functionality
	<p>The <b>Search</b> bar allows a user to dynamically search for records in the grid based on the search keyword(s) entered.</p>
	<p>The <b>Select All</b> check box is used to select/un-select all the records of a particular page in the grid.</p>
	<p>The <b>Pagination</b> provided at the bottom left of a grid allows the user to navigate to a particular page in the grid.</p>
	<p>The <b>Page Size</b> drop-down provided at the bottom of a grid allows a user to select the number of records to view per grid page.</p>
	<p>The <b>Delete</b> button provided at the bottom of a grid allows a user to delete multiple records from a grid. A user can select the check box next to one or more records in the grid and click on Delete button to delete them.</p>
	<p>The <b>Print</b> button provided at the bottom of a grid allows a user to print row details of multiple records in a grid. A user can select the check box next to one or more records in the grid and click on Print button to print row details of the selected records.</p>
	<p>The Export button allows a user to export row details of selected records from the grid. A user can choose the format, from the drop-down, in which the records need to be exported.</p>
	<p>Click on the arrow heads, provided next to each column name in a grid, to sort the records of that column in ascending or descending order respectively.</p>
	<p>The <b>View</b> icon is used to view details of a particular record from the grid.</p>
	<p>The <b>Edit</b> icon is used to edit details of a particular record from the grid.</p>

	The <b>Print</b> icon is used to print details/summary of a record.
	The <b>Delete</b> icon is used to delete a record from the grid.
	The <b>Lock</b> icon is used to indicate that the particular user role does not have access to that action item.



The access to icons under *Actions* column or to other functionalities on each *Module* page depend upon the access provided to a user role, which can be configured by Administrator. If a user role does not have permission to a particular Action item or functionality, then that will be disabled for him/her in the grid/page.

## 11. PROGRAMS MODULE

The **Programs** module displays a list of available programs under various departments in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

## Programs

Create
Sub-Programs

Select All <input type="checkbox"/>	Department Name	Program Code	Program Name	Funding Sources	Status	Actions
<input type="checkbox"/>	Humanatarian department	HMD-01	Trail run	Abhishek Rampi,	Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Virology dep	9999	Test programs	BG Inc,	Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Humanatarian department	dwqwrw	dqwfwegewe		Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Public Health	1234	nnnnsjwbdj		Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Public Health	AB110319	Files test		Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Humanatarian department	1199	cricket for poor	BG Inc,	Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Humanatarian department	HD-9966	Horticulture & Child care Development		Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Public Health	PH300	Awareness program on Covid	BG Inc., Little smiles,	Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Virology dep	202	Infections		Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>
<input type="checkbox"/>	Virology dep	201	Control Infections		Active	<span>👁</span> <span>✍</span> <span>🖨</span> <span>🗑</span> <span style="background-color: #800000; color: white; padding: 2px 5px; border-radius: 5px;">Grants</span>

First Previous 1 2 3 4 Next Last

10

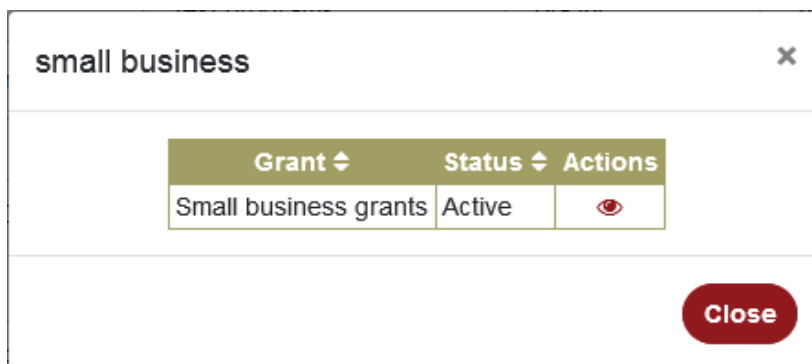
Showing 1 to 10 of 40 entries

Delete
Print

Choose format

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new program in the system.
- ◆ Click on **Sub-Programs** button (top right corner of the grid) to view a list of available sub-programs in the system in a grid format. More details about Sub-Programs are provided in **Section 11.2**.
- ◆ Click on **Grants** button (provided in the *Actions* column) for a particular Program record in the grid to view the grants associated with that particular program. Clicking on this button shall open a pop-up window as shown below.



- ◆ Click on **View** icon in the pop-up window to view details of the grant. More details about view grant are provided in **Section 12.2**.

- ◆ Click on **Close** button to close the pop-up window.

## 11.1 Create/Edit Program

Click on **Create** button from the Programs grid to add a new program under a department or click on **Edit** icon of an existing program record to edit its details. The screen shown below is displayed when these actions are performed.

### Program - Create

The screenshot shows the 'Program - Create' form with the following fields and sections:

- \*Department**: A dropdown menu with '--Select--' selected.
- \*Program Code**: A text input field.
- \*Program Name**: A text input field.
- \*Program Budget(\$)**: A text input field with a currency symbol and a small icon.
- Program Start Date**: A date input field with '06 / 17 / 2020' and a clear icon.
- Program End Date**: A date input field with '06 / 17 / 2020' and a clear icon.
- Contacts**: A section with a red 'Add New Contact' link and a green arrow pointing to it. It contains two rows of fields:
  - Primary Contact**: A dropdown menu with '--Select--' selected.
  - Primary Contact Name**: A text input field.
  - Primary Contact Email**: A text input field.
  - Primary Contact Phone**: A text input field.
  - Secondary Contact**: A dropdown menu with '--Select--' selected.
  - Secondary Contact Name**: A text input field.
  - Secondary Contact Email**: A text input field.
  - Secondary Contact Phone**: A text input field.
- Description**: A large text area.
- File**: A file upload section with a 'Browse...' button and the text 'No files selected.' A green arrow points to the 'Browse...' button.
- Status**: A dropdown menu with 'active' selected.
- Submit** and **Cancel** buttons.

- ◆ Enter/select or edit details of a program in the fields provided.

- ◆ Add/edit details of a contact for the program. To add another contact record, click on the **Add New Contact** link (highlighted in above screen shot).
- ◆ Click on the **Browse** button (highlighted in above screen shot) to add/upload a document in regard to the program.
- ◆ Select the status of the program from the Status drop-down.
- ◆ Click on **Submit** button to complete adding a new program record or to complete editing an existing program record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

After a user completes creating a new program and clicks on Submit button, additional sub-tabs are displayed, wherein the user can enter further details regarding the newly created program.

The sub-tabs for a new program or an existing program record are explained below.

#### Sub-Programs sub-tab:

**File**

Browse... No files selected.

**Status**

active

Submit Cancel

Sub Programs Application Questions Grants Fundings

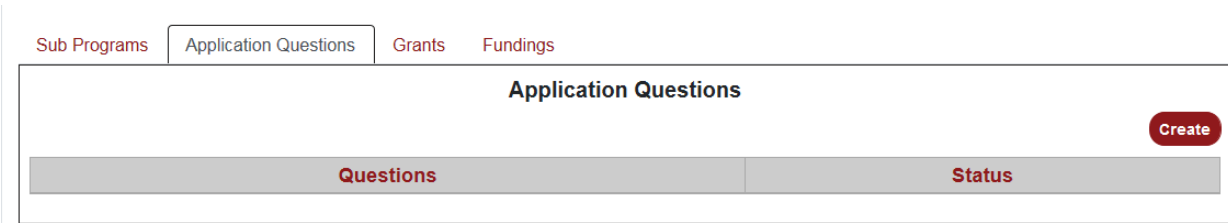
**Sub Programs**

Create SubProgram

Sub Program Name	Sub Program Code	Status	Actions
No Data			

- ◆ The **Sub-Programs** sub-tab displays any sub-programs associated with a program in grid format and allows a user to add/edit a sub-program for the newly created program.
- ◆ Click on the **Create Sub-Program** button to add a new sub-program for the program. Clicking on this button shall direct a user to the Create Sub Program page, which is explained in **Section 11.2.1**.

#### Application Questions sub-tab:



- ◆ The **Application Questions** sub-tab displays all questions related to a Program, in grid format, which can be asked to Applicants in grant applications, under this program. It also allows a user to add/edit an application question for a program.
- ◆ Click on **Create** button to add an application question for the program. This shall direct the user to Application Question page as shown below.

## Application question - Create

**\*Question** **Type**

Text Field

**Program** **Grant** **Size**

applications --Select-- 1/3 Row

**\*Score range** **Status**  Required

--Select-- active

**Submit** **Cancel**

- ◆ Enter/select the details for the new application question in the fields provided.
- ◆ Click on **Submit** button to complete adding or editing an application question.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### Grants sub-tab:

**Associated Grants**

Search... **Create**

Select All <input type="checkbox"/>	Grant ↕	Grant Budget(\$) ↕	Status ↕	Actions
<input type="checkbox"/>	school grant	100,000	Active	

First Previous 1 Next Last
10
Showing 1 to 1 of 1 entries

- ◆ The **Grants** sub-tab displays all the grants associated with a program in grid format and allows a user to add/edit a grant for a program.
- ◆ Click on **Create** button to add a new grant for the program. Clicking on this button shall direct a user to Create Grant page, which is further discussed in **Section 12.1**.

### Funding sub-tab:

Funding				
Funding Source	Funding Date	Funding Amount	Status	Actions
Demo group	April 23, 2020	5000	active	

- ◆ The **Funding** sub-tab displays all funding associated with a program in a grid format and allows a user to add/edit a funding for a program.
- ◆ Click on **Create Funding** button to add a funding for a program. Clicking on this button shall direct a user to the Create Funding page, which is further discussed in **Section 18.1**.

## 11.2 Sub Programs

The **Sub-Programs** page displays a list of available sub-programs in the system in a grid format as shown below.

### Sub Programs

Select All	Program	Sub-Program Name	Code	Status	Actions
<input type="checkbox"/>	funds for covid affected areas	aaa	aaq	active	
<input type="checkbox"/>	funds for covid affected areas	aae	ss2	active	
<input type="checkbox"/>	Environmental	bg	bgbg	active	
<input type="checkbox"/>	Environmental	Caring for Karimnagar	90210	active	
<input type="checkbox"/>	Vaccin for carona	Carona vaccin	1122	active	
<input type="checkbox"/>	Judicial	ChildrenCharity	CC	active	
<input type="checkbox"/>	Lg funds program	ChildrenCharity	CC	active	
<input type="checkbox"/>	cricket for poor	children cricket	9922	active	
<input type="checkbox"/>	Awareness program on Covid	Covid Awareness	SP-CA	active	
<input type="checkbox"/>	cricket for poor	cricket kits distribution	CKD01	active	

Showing 1 to 10 of 20 entries

- ◆ Click on **Create** button (top right corner of the grid) to create a new sub-program in the system.

### 11.2.1 Create/Edit Sub-Programs

Click on **Create** button (as mentioned above) to add a new sub-program under a program or click on **Edit** icon of an existing sub-program record to edit its details. The screen shown below is displayed when these actions are performed.

## Sub Program - Create

The form is titled "Sub Program - Create" and contains the following fields:

- \*Program**: A dropdown menu with the value "---Select---".
- \*Sub Program Name**: A text input field.
- \*Sub Program Code**: A text input field.
- Primary Contact**: A dropdown menu with the value "-----".
- Primary Contact Details**: A text input field.
- Secondary Contact**: A dropdown menu with the value "-----".
- Secondary Contact Details**: A text input field.
- Description**: A large text area for entering details.
- Status**: A dropdown menu with the value "active".

At the bottom of the form, there are two buttons: **Submit** and **Cancel**.

- ◆ Enter/select or edit details of a sub-program in the fields provided.
- ◆ Click on **Submit** button to complete adding a new sub-program record or to complete editing details of an existing sub-program record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.



## 12. GRANTS MODULE

The **Grants** module displays a list of available grants under the various programs/sub-programs in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

### Grants

Create

Select All <input type="checkbox"/>	Program	Sub Program	Grant	No.Of Days left	Status	Actions
<input type="checkbox"/>	Post Graduate School Program	None	TestGrant	Today!	Draft	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	applications	None	school grant	Today!	Active	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	BGGlobal Schools Program	None	test	1 day ago	Draft	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	BGGlobal Schools Program	None	BGGlobal Schools Grant	1 day ago	Approved	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	test 1	None	test grant 7/17/2020	5 days ago	Active	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	UB-Health Program	None	HH Application	6 days ago	Draft	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	UB-Health Program	None	UB Grant	6 days ago	Closed	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	AS Program	None	AS Grant	7 days ago	Active	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	Test Venkat Program	Test Venkat Sub Program	Test Venkat Grant	8 days ago	Active	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>
<input type="checkbox"/>	Federal Programs	None	test	9 days ago	Draft	<span style="background-color: #c00; color: white; padding: 2px 5px; border-radius: 5px;">Applications</span>

First
Previous
1
2
3
4
Next
Last

10

Showing 1 to 10 of 31 entries

Delete
Print

Choose format
v

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new grant in the system.
- ◆ Click on **Applications** button (provided in the *Actions* column) to view the applications associated with a grant record. Clicking on this button shall display a pop-up window as shown below.



Grant Demo
✕

Application	Status	Actions
Demo Application	Grant Awarded	

Close

- ◆ Click on **View** icon in the pop-up window to view details of the application associated with the grant. More details about this feature are provided in **Section 13.1**.
- ◆ Click on **Close** button to close the pop-up window.

**Icons in the Actions Column:**

Icon	Functionality
	Click on the <b>Risk Assessment</b> icon to define risk factors and their assessment for a particular grant.
	Click on the <b>Clone</b> icon to clone a particular grant.



**Grant Life Cycle:** A grant can be closed only when all the awards associated with it have been closed.

An award can be closed only when all its milestones are achieved, all the deliverables associated with it have been submitted, and corresponding invoices and payments have been processed.

## 12.1 Create/Edit Grant

Click on **Create** button (as mentioned above) to add a new grant under a particular program/sub-program in the system or click on Edit icon for an existing grant record to edit its details. The screen shown below is displayed when these actions are performed.

- ◆ Enter/select or edit details of the grant record in the fields provided.
- ◆ The field *“Allow an applicant to apply multiple times”* (highlighted in below screen shot) allows an applicant to apply for the same grant more than once.
- ◆ Add/edit details of a contact for the grant. To add another contact record, click on the **Add New Contact** link (highlighted in below screen shot).
- ◆ Click on the **Browse** button (highlighted in below screen shot) to add/upload a document in regard to the grant.
- ◆ Click on **Submit** button to complete adding a new grant record or to complete editing an existing grant record. Click on **Cancel** button to cancel the process and return to previous screen.

## Grant - Create

<b>*Program:</b> ---Select---	<b>Sub-Program:</b> -----	<b>Department:</b> 	
<b>*Grant Name:</b> 	<b>Reference No:</b> 0	<b>Allow an applicant to apply multiple times:</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	
<b>Grant Budget(\$):</b> 0	<b>Eligible Organizations</b> --Select-- Profit Organization Non-Profit Organization	<b>Funding Considerations</b> --Select-- Starting or Expanding an ADR Program Mediator/ADR Practitioner Quality Public Conflict Resolution Education	
<b>Funding source</b> ---Select---			
<b>Contacts</b> <span style="float: right;">Add New Contact</span>			
<b>Primary contact</b> ---Select---	<b>Primary Contact Name</b> 	<b>Primary Contact Email</b> 	<b>Primary Contact Phone</b> 
<b>Secondary contact</b> ---Select---	<b>Secondary Contact Name</b> 	<b>Secondary Contact Email</b> 	<b>Secondary Contact Phone</b> 
<b>Description</b> 	<b>Special Project Grants</b> 		
<b>Grant Purpose</b> 	<b>Availability and Awards of Funds</b> 		
<b>Funding Cycle</b>	<b>From:</b> 07/23/2020	<b>To:</b> 07/23/2020	
<b>Special Requirements for New Applicants</b>			
<b>Letter of Intent Required:</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	<b>Letter of Intent Due:</b> 07/23/2020	<b>Submit To:</b> 	
<b>Application Submission Information</b>			
<b>Application Due</b> 07/23/2020	<b>Submit To:</b> 	<b>Grant Submission Check List:</b> Signed Grant Application	
<b>Delivery Address:</b> 	<b>Additional Terms &amp; Requirements:</b> 	<b>Notes:</b> 	
<b>Documents:</b> Browse... No file selected.	<b>Status:</b> draft		
<b>Submit</b> <b>cancel</b>			

### 12.1.1 Edit Grant – Contacts sub-tab

There are two sub-tabs under a grant that are available when a user edit a grant record. The **Contacts** sub-tab displays a list of contacts associated with a grant, in a grid format, as shown below.

Contacts		Add New Contact	
Primary contact	Primary Contact Name	Primary Contact Email	Primary Contact Phone
testreviewer	Test Reviewer	sai@issi-software.com	None
Secondary contact	Secondary Contact Name	Secondary Contact Email	Secondary Contact Phone
Arjun	Arjun	arjund@gmail.com	5565854555

[Submit](#) [cancel](#)

Click on **Add New Contact** link (top right corner) to add a new contact for the grant record.

### 12.1.2 Edit Grant – Milestones sub-tab

The **Milestones** sub-tab displays a list of milestones, in a grid format, associated with a grant.

**Note:** Each milestone of an awarded grant shall be associated with atleast one deliverable. A milestone is considered complete only after all the deliverables associated with it have been submitted, and corresponding invoices, payments have been processed.

Contacts Milestones

**Milestones**

Search... **Create**

Milestone No↕	Milestone Name↕	Status↕	Actions
3	school setup	Active	
6	school setup 2	Active	
11	school milestone	Active	
22	Applying for test grant	Active	

First Previous **1** Next Last 10 ↕ Showing 1 to 4 of 4 entries

**Submit** **cancel**

- ◆ Click on **Create** button (top right corner) to create a new milestone for a grant. Clicking on this button shall display the below page.

## Milestone - Create

**\*Grant** **\*Milestone Name** **\*Milestone No**

school grant

**Start Date** **End Date**

07/23/2020  07/23/2020

Please Select Valid Dates

**Description**

**Submit** **Cancel**

## 12.2 View Grant

Click on **View** icon for a grant record to view its details along with information regarding *Grant Applications* associated with that particular grant. The screen shown below is displayed when a user clicks on view icon for a particular grant record.

## Grant - school grant

Back

Actions

Ask a Question

View FAQs

Department	Federal Department
Program Name	applications
Sub-Program Name	
Grant Name	school grant
Reference No	4155
Grant Budget(\$)	100,000
Description	test 7/22/2020
Special Project Grants	test 7/22/2020
Grant Purpose	test 7/22/2020
Allow an applicant to apply multiple times	Yes
Primary Contact	Test Reviewer
Secondary Contact	Arjun D
Eligible Organizations	Profit Organization
Availability and Awards of Funds	test 7/22/2020
Funding Consideration	Conflict Resolution Services
Funding source	test funding source
Funding Cycle From	July 22, 2020
Funding Cycle To	July 31, 2020
<b>Special Requirements for New Applicants</b>	
Letter of Intent Required	True
Letter of Intent Due	July 22, 2020
Submit To	Test Reviewer
<b>Match Requirements</b>	
<b>Application Submission Information</b>	
Application Due	July 22, 2020
Documents	<a href="#">grants/gms_funding_sources_duplicate.png</a>
Email-Subject Line	vskpissi@gmail.com
Delivery Address	test 7/22/2020
Grant Submission CheckList	Signed Grant Application
Additional Terms & Requirements	test 7/22/2020
Notes	test 7/22/2020
Status	Active

Associated Applications    Milestones

### Associated Applications

Search... Create

Select All <input type="checkbox"/>	Application No	Application Name	Amount Allocated(\$)	Status	Actions
<input type="checkbox"/>	GMS-2020-07-21-850590	school application	100000	Approved	

First   Previous   1   Next   Last   10   Showing 1 to 1 of 1 entries

Delete   Print   Choose   Export

- ◆ The view grant page displays all the information regarding a grant.
- ◆ Click on **Back** button in the left menu to go back to Grants page.
- ◆ An applicant can use the **Ask a Question** button in the left menu to send a question about the grant to DEQ personnel. Clicking on this button shall display the below page.

## Create Q&A - school grant

Question

**Back** **Ask**

- ◆ Click on **View FAQs** button in the left menu to view the frequently asked questions about the grant. Clicking on this button shall display the below page.

## Q&A - school grant

**Back**

**Q: What is the system of funding** (Asked By: Admin WAB)  
A: 100,000 US Dollars (Answered By: Admin WAB)

**Q: None** (Asked By: Admin WAB)  
A: none (Answered By: Admin WAB)

### 12.2.1 View Grant – Associated Application sub-tab

The **Associated Applications** sub-tab displays a list of grant applications associated with a particular grant. More details about grant applications are provided in **Section 13**.

Associated Applications **Milestones**

### Associated Applications

Search... Create

Select All <input type="checkbox"/>	Application No <span style="float: right;">⇅</span>	Application Name <span style="float: right;">⇅</span>	Amount Allocated(\$) <span style="float: right;">⇅</span>	Status <span style="float: right;">⇅</span>	Actions
<input type="checkbox"/>	GMS-2020-07-21-850590	school application	100,000	Approved	

First Previous 1 Next Last
10 ⇅
Showing 1 to 1 of 1 entries

Delete
Print
Choose ⇅
Export

### 12.2.2 View Grant – Milestones sub-tab

The **Milestones** sub-tab displays a list of milestones associated with a grant in a grid format.

Associated Applications **Milestones**

### Milestones

Search...

Milestone No <span style="float: right;">⇅</span>	Milestone Name <span style="float: right;">⇅</span>	Status <span style="float: right;">⇅</span>
3	school setup	Active
6	school setup 2	Active
11	school milestone	Active
22	Applying for test grant	Active

First Previous 1 Next Last
10 ⇅
Showing 1 to 4 of 4 entries





## 12.3 Grant Risk Assessment

Click on the **Risk Assessment** icon from the grants grid page to define risk factors and the corresponding assessment criteria for a particular grant record. The assessment to the defined risk factors are provided by the applicants when applying for a grant. The screen shown below is displayed when a user clicks on this icon from the grants grid page.

### Risk Assesments for Grant Demo

Search...

Create

S.No	Risk Factor	Risk Score Weight(Min and Max)	Actions
1	New Subrecipient	None	 

First Previous 1 Next Last

10

Showing 1 to 1 of 1 entries

- ◆ The **Risk Assessment** page for a grant record displays a list of various risk factors associated with that grant record, and the corresponding risk score weights (both *Minimum* and *Maximum* scores).
- ◆ Click on **Create** button (top right corner of the grid) to create a new risk factor for the grant.

#### 12.3.1 Create/Edit Risk Assessment

Click on **Create** button (as mentioned above) to add a new risk assessment record for a grant or click on **Edit** icon of an existing risk assessment record to edit its details. The screen shown below is displayed when these actions are performed.

## Grant Risk Assessment - Create

**Grant**

Grant Demo

**Riskfactor**

-----

**Riskscoreweight**

**Submit** **Back**

- ◆ Select the **Grant** and **Risk Factor** from the drop downs provided.
- ◆ Enter the **Risk Score Weight** for the selected risk factor in the text area provided.
- ◆ Click on **Submit** button to complete adding a new risk factor for a grant or to complete editing an existing risk factor record of a grant.
- ◆ Click on **Back** button to cancel the process and return to previous screen.

### 12.4 Clone Grant

Click on the **Clone** icon from the grants grid page to clone a particular grant record. Clicking on this icon shall direct a user to Create Grant page (as discussed in **Section 12.1**) with some of the fields auto-filled with details of the grant which is being cloned.

## 13. APPLICATIONS MODULE

The **Applications** module displays a list of grant applications, in a grid format, which have been applied for various grants available in the system. The screen shown below is displayed when a user clicks on this module from the main header.

### Applications

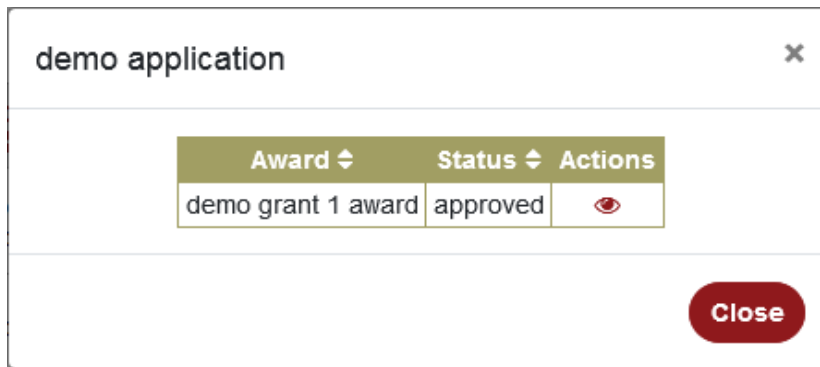
**Create**

Select All <input type="checkbox"/>	Application No <span style="font-size: small;">↕</span>	Application <span style="font-size: small;">↕</span>	Program <span style="font-size: small;">↕</span>	Grant <span style="font-size: small;">↕</span>	Organization/Individual <span style="font-size: small;">↕</span>	Status <span style="font-size: small;">↕</span>	Actions
<input type="checkbox"/>	GMS-2020-06-17-612905	Application for demo grant	Demo program	Grant for demo program	Ganti Foundation	Approved	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-17-187370	Hazrath funds	Lg funds program	Ab grant	need funding for orphan	Full Application Submitted	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-17-187370	testrgg	Test programs	Clinical research center	COVID FUND FOR ORPHANS	Full Application Submitted	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-17-187370	test2	Judicial	medical grant	Test Applicant	Full Application Submitted	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-17-187370	test run	Test programs	Clinical research center	Ganti Foundation	Full Application Draft	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-16-657520	For small business	small business	Small business grants	Matrix Organization	Full Application Draft	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-17-830645	Demo App	Medical	Demo Medical Grant	Ganti Foundation	Full Application Draft	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-15-516290	test document	Lg funds program	Ab grant	Ganti Foundation	Approved	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-16-431130	Main component by arampi	Trail run	Develop main component	ganti org	Approved	<b>Awards</b>
<input type="checkbox"/>	GMS-2020-06-15-516290	None	Lg funds program	Ab grant	Ganti Foundation	Full Application Draft	<b>Awards</b>

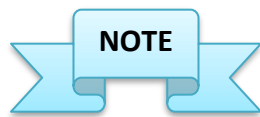
First Previous 1 2 ... 5 Next Last
10 ↕
Showing 1 to 10 of 47 entries

Delete
Print
Choose format ▼
Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new application for a grant in the system.
- ◆ Click on **Awards** button (provided in *Actions* column), provided in the *Actions* column, for a particular Application record in the grid to view the award associated with that particular application. Clicking on this button shall open a pop-up window as shown below.



- ◆ Click on **View** icon in the pop-up window to view details of the award. More details about View Award are provided in **Section 15.2**.
- ◆ Click on **Close** button to close the pop-up window.



**A Unique Identifier is assigned to each grant application after they are saved/submitted. This Identifier shall help the DEQ personnel and applicants to track grant applications in the GMS portal.**

### 13.1 Create/Edit Application

Click on **Create** button from the Applications grid page to add a new grant application under a grant or click on **Edit** icon of an existing application record to edit its details. The screen shown below is displayed when these actions are performed.

#### Main Application tab:

## Create Application

**\*Application Name**

**\*Grant**

**\*Applicant type**

**Organization**

**\*Amount requested(\$)**

**\*Grant special processing**  
 Yes  No

**\*Non-Profit**  
 Yes  No

**Amount Allocation(How amount is going to be used)**

---

**Contacts**

[Add New Contact](#)

Primary contact	Primary Contact Name	Primary Contact Email	Primary Contact Phone
<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Secondary contact	Secondary Contact Name	Secondary Contact Email	Secondary Contact Phone
<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

**Narrative application**

**Project narrative**

**File**  
 No file selected.

- ◆ Enter/select or edit details of an application in the fields provided.
- ◆ Add/edit details of a contact for the application. To add another contact record, click on the **Add New Contact** link (highlighted in above screen shot).
- ◆ Click on the **Browse** button (highlighted in above screen shot) to add/upload a document in regard to the grant application.
- ◆ Click on **Save Draft** button to save a draft of the application.
- ◆ Click on **Submit** button to complete adding a new application record or to complete editing an existing program record.
- ◆ Click on **Go to Full Application** button to go to complete application form for the grant.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## Supporting Questions tab:

The **Supporting Questions** tab (as shown below) displays a list of questions that are asked to applicant as part of the grant application process. These questions will be set at individual grant level (as discussed in **Section 21.8**) by DEQ personnel, and shall need to be answered by the applicant when applying for a grant.

## Edit Grant Application

The screenshot shows the 'Supporting Questions' tab in the 'Edit Grant Application' interface. It contains three questions:

- \* clinical resech funds: A text input field.
- \* how much is fund granted for clinical research: A dropdown menu with '90000' selected.
- \* Is clinical resech fund will be granted: Radio buttons for 'Yes' and 'No' (selected).

At the bottom of the form are three buttons: 'Previous', 'Save Draft', and 'Submit'.

- ◆ Select/enter or edit answers to the Supporting questions for a grant.
- ◆ Click on **Save Draft** button to save a draft of the grant application.
- ◆ Click on **Previous** button to go back to the Main Application tab.
- ◆ Click on **Submit** button to submit the grant application.

## Terms of Assurance tab:

The **Terms of Assurance** tab displays the terms and conditions, and Federal assurances (if any) associated with a grant.

A grant applicant shall have to read the terms of assurances and select an appropriate option from the drop-down (highlighted in below screen shot) and click **Submit** button to provide consent to the terms.

## Edit Grant Application

Main Application Supporting Questions Terms of Assurance

The Board / Organization hereby applies for and, if awarded, accepts the federal program funds requested in this application. In consideration of the receipt of these grant funds, the Board agrees that the General Assurances form for all federal funds and the terms therein are specifically incorporated by reference in this application. The Board also certifies that all programs and pertinent administrative requirements will be met. These include the Education Department General Administrative Regulations (EDGAR), the Office of Management and Budget Accounting Circulars, and the Department of Education's General Education Provisions Act (GEPA) requirement. In addition, the Board certifies that the charter school is in compliance with the requirements of the federal Children's Internet Protection Act (CIPA) and that no policy of the local educational agency prevents or otherwise denies participation in constitutionally protected prayer in public schools.

Charter schools/district partnership(s) that accept funding through the Oregon Charter School Grant Program agree to the following assurances:

1. The authorized representative possesses the legal authority to apply for this grant, to execute the grant, to comply with certifications, budget,

Yes | I agree to the terms of assurance

Previous Save Draft Submit

After a grant application is submitted, additional sub-tabs are displayed for an application, wherein more details about the application can be furnished. A user can access these sub-tabs by clicking on the **Edit** icon for the application from the grid.







The sub-tabs for a new grant application or an existing application record are explained below.

### Reviews sub-tab:

Reviews Documents Expenses Comments Awards Assesment Tool Notifications Audit Log

### Reviews

Add Review

Perform Task	Assignee	Review Assigned Date	Review Due Date	Status	Action
In-Person Review of Submitted application	Admin WAB	July 24, 2020	July 29, 2020	Active	 
Final Preliminary Review of submitted application	Admin WAB	July 24, 2020	July 27, 2020	Active	 
Application submission by Applicant	Admin WAB	July 12, 2020	None	Complete	 

Reviews Average Score: 7.5

Back Cancel Approve Application & Create Award Decline Application View Log

- ◆ The **Reviews** sub-tab displays information about all the reviews performed, in a grid format, in regard to a grant application. It also allows a user to add a review for the grant application.

- ◆ Click on the **Add Review** button to add a new review for the grant application. Clicking on this button shall direct a user to the Create Review page, which is explained in **Section 14.1**.
- ◆ Click on **Edit** icon for a review record to go the edit page of that review. More details about this are provided in **Section 14.1**.
- ◆ The **Reviews Average Score** label (highlighted in above screen shot) displays an average of the scores received from all the reviews of the grant application.
- ◆ Click on **Approve Application & Create Award** button if review of a grant application is complete and the user wants to create an award for that grant application. Clicking on this button shall direct the user to Create Award page, which is explained in **Section 15.1**.
- ◆ Click on **Decline Application** button if the review of a grant application is complete and the user wants to decline the application.

**Note:** The options to **Approve Application & Create Award** and **Decline Application** may be available only to Administrator role and is used to either approve a grant application or decline it, only after all the corresponding reviews of that grant application are complete.

- ◆ Click on **View Log** link (highlighted in above screen shot) to view log of all the actions performed on a grant application, as shown below.

## Application Log

Back to Application

Title	Detail	Timestamp	Actions
Application Details Saved (Full Draft): GMS-2020-06-23-283460	Test	June 23, 2020, 5:41 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-23-300560	Test	June 22, 2020, 11:38 p.m.	
Application Details Saved (Full Draft): GMS-2020-06-23-832520	Test	June 23, 2020, 6:47 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-23-832520	Test	June 24, 2020, 12:22 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-23-832520	Test	June 25, 2020, 3:59 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-23-90180	Test	June 23, 2020, 4:43 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-26-133210	Test	June 30, 2020, 6:58 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-26-133210	Test	June 30, 2020, 10:31 p.m.	
Application Details Saved (Full Draft): GMS-2020-06-26-133210	Test	July 1, 2020, 12:17 a.m.	
Application Details Saved (Full Draft): GMS-2020-06-26-133210	Test	July 1, 2020, 12:21 a.m.	

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...
10
Next
Last

10
↕

Showing 1 to 10 of 96 entries



### Document sub-tab:

Documents					
Document	File Name	File Type	Source by	Status	Action
Test Document	Test_Document.docx	docx	applicant	active	<a href="#">Download</a> <a href="#">View</a>

- ◆ The **Documents** sub-tab displays all the documents associated with a grant application in a grid format and allows a user to add/view/download a document.
- ◆ Click on **Add Document** button to add a new document for a grant application. Clicking on this button directs a user to Add Document page, which is discussed in **Section 21.9.1**.
- ◆ Click on **Download** button (provided in *Actions* column) to download a document on the local system.
- ◆ Click on **View** button (provided in *Actions* column) to view a document.

### Expenses sub-tab:

Expenses							
Application	Budget	Category	SubCategory	Start Date	End Date	Description	Actions
No Data							

- ◆ The **Expenses** sub-tab displays all expenditures, in a grid format, which an entity applying for a grant will mention in the grant application. It also allows a user/applicant to add a new expense record.
- ◆ Click on **Add Expense** button to add a new expenditure record, which is discussed in **Section 21.1.1**.

### Comments sub-tab:

Reviews Documents Expenses **Comments** Awards Assesment Tool Notifications Audit Logs

Comments		
Comment	Status	Action
Comment on Applications(demo application) by Test Admin	Active	<a href="#">View</a>

[Add Comment](#)

- ◆ The **Comments** sub-tab displays a list of all the comments entered in regard to a grant application in grid format. It also allows a user to add/view a comment.
- ◆ Click on **View** button (provided in *Actions* column) to view a comment.
- ◆ Click on **Add Comment** button to add a new comment in regard to a grant application. This shall direct the user to an Add Comment page as shown below.

## Comment - Create

**\*Application** demo application **\*Name** Comment on Applications(demo applic **User** testadmin

**Comment**

**File**  No file selected. **Status** active

[Submit](#) [Cancel](#)

- ◆ Enter/select the details for the new comment in the fields provided.
- ◆ Click on **Submit** button to complete adding or editing a comment.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### Awards sub-tab:

- ◆ The **Awards** sub-tab displays a list of all the awards granted to an application in grid format. It also allows a user to add/view an award for an application.

- ◆ Click on **View** button (provided in *Actions* column) to view details of an award. This shall direct a user to the View Award page, as discussed in **Section 15.2**.
- ◆ Click on **Add Award** button to add a new award for a grant application. This shall direct the user to an Add Award page, as discussed in **Section 15.1**.

Reviews Documents Expenses Comments Awards Assessment Tool Notifications Audit Logs

Awards		
Award	Status	Action
demo grant 1 award	Approved	<a href="#">View</a>

[Add Award](#)

**Assessment Tool sub-tab:**

- ◆ The **Assessment Tool** sub-tab allows an applicant to provide his/her assessment for risk factors associated with a grant.

Reviews Documents Expenses Comments Awards Assessment Tool Notifications Audit Logs

Assesment			
S.No	Risk Factor	Risk Score	Action
	New Subrecipient	None	None

[Add Assesment](#)

- ◆ Click on **Add Assessment** button add a new assessment as part of the grant application. Clicking on this button shall display the below screen.

## Application Risk - Create

Back

**Grant**

Grant Demo

**Application**

Demo Application

**Riskfactor**

-----

**Riskscoreweight**

**Weighted score**

Submit

- ◆ Select the **Grant** and the **Application** from the drop downs.
- ◆ Select a **Risk Factor** for the grant from the drop down.
- ◆ Enter the **Risk Score Weight** and the **Weighted Score** for the selected risk factor in the fields provided.
- ◆ Click on **Submit** button to complete adding a new risk assessment for the grant.

### Notifications sub-tab:

To	Date Added	Sent	Date Sent
pappupradeepkumar@gmail.com; abharadwaj@issi-software.com	June 17, 2020, 3:25 p.m.	{{communication.ok yesno:"Sent,Failed"}}	June 17, 2020, 3:25 p.m.

- ◆ The **Notification** sub-tab allows a user to view notifications sent/received and their details, as part of grant application processing.

### Audit Logs sub-tab:

Reviews Documents Expenses Comments Awards Assessment Tool Notifications **Audit Logs**

Action	Task	when	By
Application Edited	Application Questions Added	June 18, 2020, 5:25 a.m.	AdminWAB
Application Edited	Application Questions Added	June 18, 2020, 5:25 a.m.	AdminWAB
Application Edited	None	June 18, 2020, 5:25 a.m.	AdminWAB
Application Edited	None	June 18, 2020, 5:20 a.m.	AdminWAB
Application Edited	Application Questions Added	June 18, 2020, 5:20 a.m.	AdminWAB
Application Edited	Application Questions Added	June 18, 2020, 5:20 a.m.	AdminWAB
Application Edited	None	June 18, 2020, 5:20 a.m.	AdminWAB
Application Edited	None	June 18, 2020, 5:13 a.m.	AdminWAB
Application Created	None	June 18, 2020, 5:13 a.m.	AdminWAB

- ◆ The **Audit Logs** sub-tab displays a list of tasks performed and other details regarding a grant application, as part of processing that application.

## 14. REVIEWS MODULE

The **Reviews** module displays a list of pending or completed review tasks for various grant applications, in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

### Reviews

Search... **Create**

Select All <input type="checkbox"/>	Application <span>↕</span>	Review Name <span>↕</span>	Status <span>↕</span>	Actions
<input type="checkbox"/>	Demo Application	Review by Test Reviewer	Reviewed	
<input type="checkbox"/>	demo app 6/19/20	test application	Reviewed	
<input type="checkbox"/>	Test Application for Demo - 6/19	inperson review	Reviewed	
<input type="checkbox"/>	test demo 4	Review of test demo 4	Reviewed	
<input type="checkbox"/>	RPG Application	Review of RPG Application	Reviewed	
<input type="checkbox"/>	demo app for demo grant today	in-person for demo app	Reviewed	
<input type="checkbox"/>	demo application 2	Review of demo application 2	Reviewed	
<input type="checkbox"/>	Kiran funds org	Review as on jun 18	Reviewed	
<input type="checkbox"/>	demo application	Review of demo application	Active	
<input type="checkbox"/>	Reviews Test		Active	

First Previous **1** 2 Next Last Showing 1 to 10 of 17 entries

Delete Print Choose format Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new review task for a particular grant application.

- ◆ If the status for a grant application (under the **Status** column in the grid) is set to “Reviewed”, then it means that the review task for that particular grant application by the user logged in is complete. If the status is set to “Active”, then the review task assigned to the user logged in for a particular grant application is pending.



**A user shall see only those review tasks (for various grant applications) on this page that are assigned to him/her.**

## 14.1 Create/Edit Review

Click on **Create** button from the Reviews grid page to add a new review task for a grant application or click on **Edit** icon of an existing review task record to edit its details. The screen shown below is displayed when these actions are performed.

### Grant Review Details

<b>*Review Name</b> <input type="text" value="Review of quin application"/>	<b>Grant</b> <input type="text" value="quin grant"/>	<b>*Application Name</b> <input type="text" value="quin application"/>
<b>*Perform a Task</b> <input type="text" value="--Select--"/>	<b>Assigned to</b> <input type="text" value="--Select--"/>	<b>*Assigned Date</b> <input type="text" value="07 / 24 / 2020"/>
<b>Review Due Date</b> <input type="text" value="mm / dd / yyyy"/>	<b>*Immediate Notification Required</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>*Communicate with External Parties Required</b> <input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Notes</b> <div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>		
<input type="button" value="Submit"/> <input type="button" value="Back to application"/>		

- ◆ Enter the **Review Name** for a review task; select **Grant** and **Application Name** for the review task from the drop downs provided.

- ◆ Select an appropriate option from the **Perform a Task** drop-down to indicate the next review task to perform.
- ◆ Select the name of the person from the **Assigned to** drop-down to assign the review task to. Select **Assigned Date** and **Review Due Date** in the fields provided.
- ◆ Select appropriate options for **Immediate Notification Required** and **Communicate with External Parties Required** fields.
- ◆ Enter **Notes** for the review task in the text area provided.
- ◆ Click on **Submit** button to complete adding a new review task. Click on **Back to application** button to cancel the process and return to previous screen.

### Edit Review:

## Review - Edit

\*Application:

\*Review Name:

\*Assigned to:

Description:

Disposition:

Recommendation:

\*Score:  ←

Review Comments:

File:

- ◆ Edit the details of the review task in the fields provided.
- ◆ Select a **Score** (highlighted in above screen shot) for the grant application based on the completed review task.
- ◆ Click on **Save** button to complete editing details of the review task.
- ◆ Click on **Approve** button to approve the review task for a grant application and move on to the next review task (if any) for that application.

- ◆ Click on **Application Incomplete** button to indicate that the details furnished in the grant application are missing/incomplete and send the application back to the applicant.
- ◆ Click on **Decline** button to decline the application for the review task of the grant application.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.



Each grant application undergoes different stages of review that are driven by the workflow rules defined for a particular program.

Declining a grant application at a particular stage of review process does NOT stop the review process of the application, unless it is the last step of the review process.

## 15. AWARDS MODULE

The **Awards** module displays a list of awards granted so far, along with their details in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

### Awards

Create

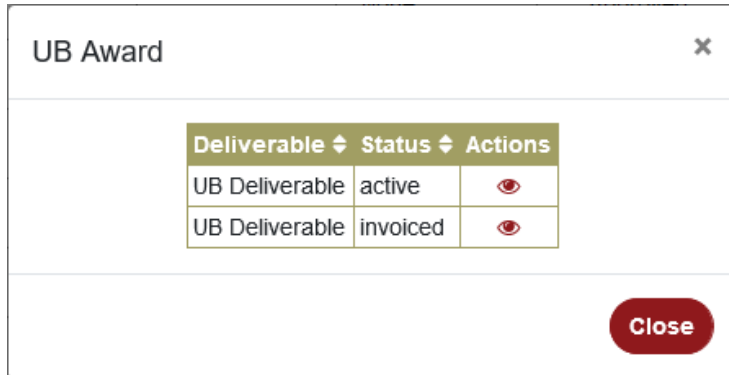
Select All <input type="checkbox"/>	PO#	Grant	Application	Award	Status	Actions
<input type="checkbox"/>	po for save trees	save trees grant	save trees application	save trees award	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	po for award	save trees grant	save trees application	test	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	None	school grant	school application	None	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	None	school grant	school application	None	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	po for award	school grant	school application	school award	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	None	school grant	school application	None	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	None	school grant	school application	None	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	None	school grant	school application	None	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	Award for BG Global Schools	BGGlobal Schools Grant	BGGlobal Schools Application	BGGlobal Schools Award	Underprogress	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>
<input type="checkbox"/>	For Health Grant	quin grant	UB Application	UB Award	Approved	<span>👁</span> <span>✍</span> <span>🗑</span> <span>🗑</span> <span style="background-color: #c00; color: white; border-radius: 10px; padding: 2px 10px;">Deliverables</span>

First Previous 1 2 3 4 Next Last
10
Showing 1 to 10 of 33 entries

Delete
Print
Choose format
Export



- ◆ Click on **Create** button (top right corner of the grid) to add a new award in the system.
- ◆ Click on **Deliverables** button (provided in the *Actions* column) to view the deliverables associated with the award record. Clicking on this button shall display a pop-up window as shown below.



## 15.1 Create Award


Click on **Create** button (as mentioned above) to add a new award for a particular grant in the system. The screen shown below is displayed when this action is performed.

- ◆ Enter/select details of the new award record in the fields provided.
- ◆ Add/edit details of a contact for the award. To add another contact record, click on the **Add New Contact** link (highlighted in below screen shot).
- ◆ Click on the **Browse** button (highlighted in below screen shot) to add/upload a document in regard to the award.
- ◆ Click on **Submit** button to complete adding a new award record. Click on **Cancel** button to cancel the process and return to previous screen.

## Award - Create

<b>*Application</b> --Select--	<b>Program</b> <input type="text"/>	<b>Sub Program</b> <input type="text"/>
<b>Grant</b> <input type="text"/>	<b>*Name</b> <input type="text"/>	<b>Organization/Grantee</b> <input type="text"/>
<b>Date Applied</b> <input type="text"/>	<b>Award Date</b> 07 / 24 / 2020	<b>*Purchase order</b> <input type="text"/>


---

**Contacts** Add New Contact 

<b>Primary contact</b> --Select--	<b>Primary Contact Name</b> <input type="text"/>	<b>Primary Contact Email</b> <input type="text"/>	<b>Primary Contact Phone</b> <input type="text"/>
<b>Secondary contact</b> --Select--	<b>Secondary Contact Name</b> <input type="text"/>	<b>Secondary Contact Email</b> <input type="text"/>	<b>Secondary Contact Phone</b> <input type="text"/>

---

<b>Description</b> <input type="text"/>	<b>Reporting</b> <input type="text"/>
<b>Invoicing</b> <input type="text"/>	<b>Closeout</b> <input type="text"/>

**File**  
 No file selected. 

## 15.2 View Award

Click on **View** icon for an award record to view its details along with information regarding *Expenditures* and *Deliverables* associated with that particular award. The screen shown below is displayed when a user clicks on view icon for a particular award record.

### Award

**Back**

---

**Dependents**

---

**Deliverable**

---

**Expenditure**

<b>Program</b>	save trees program
<b>Sub Program</b>	ST Subprogram
<b>Grant</b>	save trees grant
<b>Application</b>	save trees application
<b>Organization/Grantee</b>	Ganti Foundation
<b>Name</b>	save trees award
<b>Date Applied</b>	07/23/2020
<b>Award Date</b>	07/31/2020
<b>Purchase Order(\$)</b>	po for save trees
<b>Primary Contact</b>	Test Reviewer
<b>Secondary Contact</b>	KK S
<b>Description</b>	test 7/23/2020
<b>Reporting</b>	
<b>Invoicing</b>	
<b>Closeout</b>	yes
<b>Notes</b>	
<b>File</b>	awards/gms_funding_sources_duplicate.png
<b>how much is the fund :</b>	
<b>I want to close my grant :</b>	No
<b>Status</b>	Approved

### Associated Deliverables

Create

Select All	Award	Deliverable	Amount(\$)	Status	Actions
<input type="checkbox"/>	save trees award	save trees deliverable	100000	Active	<span>👁</span> <span>📄</span> <span>🖨</span> <span>📄</span> <span>🗑</span>

First
Previous
1
Next
Last

10

Showing 1 to 1 of 1 entries

Delete
Print
Choose
Export

- ◆ The view award page displays all the information regarding an award.
- ◆ The **Associated Deliverables** section (highlighted in above screen shot) displays a list of deliverables associated with that particular award. More details about Deliverables are provided in **Section 16**.
- ◆ Click on Create button (top right corner of Deliverables grid) to add a deliverable for an award.
- ◆ Click on **Back** button, in the left menu, to go back to Awards page.
- ◆ Click on **Deliverable** button in the left menu to go to Create Deliverable page. More details about creating Deliverables are provided in **Section 16.1**.
- ◆ Click on **Expenditure** button in the left menu to go to Create Expenditure page. More details about Expenditures are provided in **Section 21.1**.

## 15.3 Edit Award

The Edit Award page has two tabs:

- ◆ Award tab
- ◆ Closeout Questions tab

### 15.3.1 Award tab

The **Award** tab allows a user to edit details of an award, along with details of milestones and the option to close out an award. The screen shown below is displayed when a user clicks on the **Edit** icon of an award record from the grid page.

## Award - Edit

Award Close Out Questions

<b>*Application</b> save trees application	<b>Program</b> save trees program	<b>Sub Program</b> ST Subprogram
<b>Grant</b> save trees grant	<b>*Name</b> save trees award	<b>Organization/Grantee</b> Ganti Foundation
<b>Date Applied</b> 07 / 23 / 2020	<b>Award Date</b> 07 / 31 / 2020	<b>*Purchase order</b> po for save trees

**Contacts** Add New Contact

<b>Primary contact</b> testreviewer	<b>Primary Contact Name</b> Test Reviewer	<b>Primary Contact Email</b> sai@issi-software.com	<b>Primary Contact Phone</b> None
<b>Secondary contact</b> KK	<b>Secondary Contact Name</b> KK	<b>Secondary Contact Email</b> kks@gmail.com	<b>Secondary Contact Phone</b> 2215695855

<b>Description</b> test 7/23/2020	<b>Closeout</b> yes
--------------------------------------	------------------------

Milestone	Expected Start Date	Expected End Date	Start Date	End Date
Applying for test grant	07/23/2020	07/31/2020	mm / dd / yyyy	mm / dd / yyyy

Do you want to closeout this award?

**File**  
Currently:  
awards/gms\_funding\_sources\_duplicate.png  
 Clear

Change:  
 No file selected.

- ◆ Edit the details of the award in the fields provided.

- ◆ The **Milestone** section (highlighted in above screen shot) displays a list of milestones associated with the grant/award, along with expected start and end dates. A user shall have the ability to enter the actual start and end dates of a milestone.

**Note:** Once an end date is entered for a milestone, it marks the completion of that particular milestone.

- ◆ Select the “Do you want to closeout this award?” checkbox (highlighted in above screen shot) for an award if it is ready to be closed.

**Note:** Checking this option shall enable the **Closeout Questions** tab. If all the criteria for closing an award is not met (viz. milestones, deliverables, invoices and payments), then an alert message is triggered asking for confirmation.



**An Award should be closed only after all milestones associated with it are achieved, all deliverables submitted, all corresponding invoices and payments processed.**

**At this point, a user can select the checkbox (mentioned in above point). This shall enable the *Closeout Questions* tab. A user can now answer the closeout questions for an award and once complete, save the changes to close the award.**

### 15.3.2 Closeout Questions tab

The **Closeout Questions** tab displays a list of questions that should be answered before closing an award.

## Award - Edit

Award Close Out Questions

* how much is the fund	Answered by	Answered on
<input type="text"/>	<input type="text"/>	<input type="text"/>
* I want to close my grant	Answered by	Answered on
<input type="radio"/> Yes <input checked="" type="radio"/> No	admin	2020-07-23

- ◆ Enter/select answers for the closeout questions provided for an award.
- ◆ Click on **Save** button to save the answers entered/selected for closeout questions and close the award.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 16. DELIVERABLES MODULE

The **Deliverables** module displays a list of deliverables, in a grid format, which have been submitted for various awards. The screen shown below is displayed when a user clicks on this module from the main header.

### Deliverables

Create

Select All <input type="checkbox"/>	Application ↕	Award ↕	Deliverable ↕	Due date ↕	Amount(\$) ↕	Status ↕	Actions
<input type="checkbox"/>	LG Polymer fund	Ab grant award	Ab grant award deliverable	06/03/2020	0	Active	
<input type="checkbox"/>	LG Polymer fund	Ab grant award	ab grant delv	06/01/2020	None	Active	
<input type="checkbox"/>	LG Polymer fund	Ab grant award	Ab grant award deliverable	05/26/2020	1000	Active	
<input type="checkbox"/>	LG Polymer fund	Ab grant award	fundings	05/22/2020	None	Active	
<input type="checkbox"/>	LG Polymer fund	Ab grant award	test	05/22/2020	None	Active	
<input type="checkbox"/>	LG Polymer fund	Ab grant award	fundings	05/22/2020	None	Active	
<input type="checkbox"/>	LG Polymer fund	Ab grant award	invoices	05/20/2020	10	Active	
<input type="checkbox"/>	Clinical research center	Clinical research center award	Rohit	06/16/2020	500	Active	
<input type="checkbox"/>	covid awarness	Covid Awarness program award	Varun	06/11/2020	0	Active	
<input type="checkbox"/>	demo application	demo grant 1 award	demo deliverable	06/18/2020	2900	Complete	

First Previous 1 2 3 Next Last

10 ↕

Showing 1 to 10 of 23 entries

Delete
Print

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new deliverable in the system.

## 16.1 Create/Edit Deliverable

Click on **Create** button from the Deliverables grid to add a new deliverable for an awarded grant or click on **Edit** icon of an existing deliverable record to edit its details. The screen shown below is displayed when these actions are performed.

### Deliverable - Create

<b>Program</b> <input type="text"/>	<b>Grant</b> <input type="text"/>	<b>Application</b> <input type="text"/>	<b>*Award</b> ---Select---
<b>*Name</b> <input type="text"/>	<b>Due date</b> 07 / 24 / 2020	<b>Budget amount (\$)</b> 0	<b>Deliverable type</b> Expenditure Report
<b>Milestone</b> ---Select---			
<b>Contacts</b>			
<a href="#">Add New Contact</a>			
<b>Primary contact</b> ---Select---	<b>Primary Contact Name</b> <input type="text"/>	<b>Primary Contact Email</b> <input type="text"/>	<b>Primary Contact Phone</b> <input type="text"/>
<b>Secondary contact</b> ---Select---	<b>Secondary Contact Name</b> <input type="text"/>	<b>Secondary Contact Email</b> <input type="text"/>	<b>Secondary Contact Phone</b> <input type="text"/>
<b>Description</b> <input type="text"/>	<b>Budget description</b> <input type="text"/>		
<b>Reporting</b> <input type="text"/>	<b>Stakeholders</b> <input type="text"/>		
<b>Approval</b> <input type="text"/>	<b>Notes</b> <input type="text"/>		
<b>Status</b> active			
<b>Submit</b> <b>Cancel</b>			



- ◆ Enter/select or edit details of a deliverable in the fields provided.
- ◆ Select the appropriate **Milestone** the deliverable needs to be associated with from the drop-down.  
**Note:** Each Milestone for a grant should have atleast one Deliverable associated with it.
- ◆ Add/edit details of a contact for the deliverable. To add another contact record, click on the **Add New Contact** link (highlighted in above screen shot).
- ◆ Select the status of the deliverable from the Status drop-down.
- ◆ Click on **Submit** button to complete adding a new deliverable record or to complete editing an existing deliverable record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 16.2 View Deliverable

Click on **View** icon for a deliverable record to view its details along with information regarding *Expenses* associated with that particular deliverable. The screen shown below is displayed when a user clicks on view icon for a particular grant record.

## Deliverable

Back

---

Actions

Add Invoice

<b>Grant</b>	Ab grant
<b>Application No</b>	GMS-2020-05-13-285615
<b>Award</b>	Ab grant award
<b>Title</b>	Ab grant award deliverable
<b>Owner</b>	
<b>Due Date</b>	June 3, 2020
<b>Description</b>	
<b>Budget Amount</b>	0
<b>Budget Description</b>	
<b>Primary Contact</b>	
<b>Secondary Contact</b>	
<b>Reporting</b>	
<b>Stakeholders</b>	
<b>Approval</b>	
<b>Notes</b>	
<b>Status</b>	Active

Budget	Status	Action
Ab grant award	Active	<a href="#">View</a>

- ◆ The view deliverable page displays all the information regarding a deliverable.
- ◆ The section below the deliverable details provides information regarding budget/expenses for a deliverable.
- ◆ Click on the **View** button (highlighted in above screen shot), provided in *Actions* column, to view details regarding the expenditure associated with the deliverable.
- ◆ Click on **Back** button in the left menu to go back to Deliverables page.
- ◆ Click on **Add Invoice** button in the left menu to add an invoice record for a deliverable. More details on adding invoice are provided in **Section 17.1**.

## 17. INVOICES MODULE

The **Invoices** module displays a list of invoices processed or that are currently under process, for various awards/deliverables, in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

### Invoice

Create

Select All <input type="checkbox"/>	Grant	Deliverable	Invoice No	Name	Amount(\$)	Status	Actions
<input type="checkbox"/>	Ab grant	ab grant deliverable	GMS-Invoice-2020-06-16-936220	AB	232	Submitted	
<input type="checkbox"/>	Develop main component	Develop main component award deliverable	GMS-Invoice-2020-06-16-342825	Main components inv	200	Paid	
<input type="checkbox"/>	Clinical research center	Rohit	GMS-Invoice-2020-06-15-766415	Rohit	900	Paid	
<input type="checkbox"/>	Funding for poor children cricket foundation	Sourav	GMS-Invoice-2020-06-15-766415	Sourav	100000	Submitted	
<input type="checkbox"/>	medical grant	1st deliverable	GMS-Invoice-2020-06-12-937740	123456	200	Submitted	
<input type="checkbox"/>	Covid Awarness program	Varun	GMS-Invoice-2020-06-09-460955	Varun	100000	Draft	
<input type="checkbox"/>	Virus eradication program	Rishi	GMS-Invoice-2020-06-07-258210	Rishi	500	Paid	
<input type="checkbox"/>	Funds for elephant survival	Applicant	GMS-Invoice-2020-06-04-88130	Bhaghavathula charitable trust	100000	Submitted	
<input type="checkbox"/>	funding for small houses	Bhaghavathula charitable trust	GMS-Invoice-2020-05-29-785465	Bhaghavathula charitable trust	5000	Paid	
<input type="checkbox"/>	Ab grant	fundings	GMS-Invoice-2020-06-01-103445	testing inv	None	Draft	

First Previous 1 2 Next Last

Showing 1 to 10 of 13 entries

Delete
Print

Choose format
▼

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new invoice in the system.

### 17.1 Create/Edit Invoice

Click on **Create** button (as mentioned above) to add a new invoice for a particular award/deliverable or click on **Edit** icon for an existing invoice record to edit its details. The screen shown below is displayed when these actions are performed.

- ◆ Enter/select or edit details of the invoice record in the fields provided.
- ◆ Add/edit details of a contact for the invoice record. To add another contact record, click on the **Add New Contact** link (highlighted in below screen shot).

- ◆ Click on the **Browse** button (highlighted in below screen shot) to add/upload a document in regard to the award.
- ◆ Click on **Submit** button to complete adding a new invoice record or to complete editing an existing invoice record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## Invoice - Create

The form is titled "Invoice - Create" and contains several sections for data entry:

- Program, Grant, Application, Award:** Each has a text input field.
- Awardee:** Text input field.
- \*Deliverable:** Dropdown menu with "--Select--" selected.
- \*Name:** Text input field.
- Date:** Text input field with "06 / 17 / 2020" and a clear icon.
- Period:** Text input field.
- Amount (\$):** Text input field with "0" and a spinner.
- Submitted To:** Dropdown menu with "admin" selected.
- Description:** Large text area.
- Notes:** Large text area.
- Contacts:** A section with a red "Add New Contact" link. It contains two rows of fields:
  - Primary contact:** Dropdown menu with "--Select--".
  - Primary Contact Name:** Text input field.
  - Primary Contact Email:** Text input field.
  - Primary Contact Phone:** Text input field.
  - Secondary contact:** Dropdown menu with "--Select--".
  - Secondary Contact Name:** Text input field.
  - Secondary Contact Email:** Text input field.
  - Secondary Contact Phone:** Text input field.
- File:** A text input field with a "Browse..." button and the text "No file selected.".
- Status:** Dropdown menu with "draft" selected.
- Buttons:** "Submit" and "Cancel" buttons at the bottom.

Two green arrows point to the "Browse..." button in the File section and the "Add New Contact" link in the Contacts section.

## 18. FUNDING MODULE

The **Funding** module displays a list of available funding for various programs, along with their details in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

### Funding

Create

Select All <input type="checkbox"/>	Program <span style="font-size: 0.8em;">↕</span>	Amount(\$) <span style="font-size: 0.8em;">↕</span>	Funding Date <span style="font-size: 0.8em;">↕</span>	Funding Source <span style="font-size: 0.8em;">↕</span>	Purpose Of Funding <span style="font-size: 0.8em;">↕</span>	Funding Method <span style="font-size: 0.8em;">↕</span>	Actions
<input type="checkbox"/>	Test programs	1000	04/23/2020	BG Inc	None	None	
<input type="checkbox"/>	Trail run	5000	06/16/2020	Abhishek Rampi	None	Wire/Online Transfer	
<input type="checkbox"/>	cricket for poor	10000	04/23/2020	BG Inc	None	None	
<input type="checkbox"/>	Awareness program on Covid	15	04/23/2020	Little smiles	None	None	
<input type="checkbox"/>	public care	10	04/23/2020	Little smiles	None	None	
<input type="checkbox"/>	Awareness program on Covid	100000	04/23/2020	BG Inc.	None	None	
<input type="checkbox"/>	public care	100	04/23/2020		None	None	
<input type="checkbox"/>	public care	0	04/23/2020		None	None	
<input type="checkbox"/>	SSC Charity	100000	04/23/2020	BG Inc.	For charity	Cash	
<input type="checkbox"/>	Medical	10	04/23/2020	BG Inc.	None	None	

First Previous 1 2 Next Last

10 ↕

Showing 1 to 10 of 18 entries

Delete
Print

Choose format
▼
Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new funding record in the system.

### 18.1 Create/Edit Funding

Click on **Create** button (as mentioned above) to add a new funding record for a particular program or click on **Edit** icon for an existing funding record to edit its details. The screen shown below is displayed when these actions are performed.

- ◆ Enter/select or edit details of the funding record in the fields provided.
- ◆ Add/edit details of a contact for the funding record. To add another contact record, click on the **Add New Contact** link (highlighted in below screen shot).
- ◆ Click on **Submit** button to complete adding a new funding record or to complete editing an existing funding record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## Funding - Create

<b>*Program</b>	<b>*Funding Source</b>	<b>*Amount(\$)</b>	
<input type="text" value="---Select---"/>	<input type="text" value="---Select---"/>	<input type="text" value="0"/>	
<b>Contacts</b>			
	<a href="#">Add New Contact</a>		
<b>Primary contact</b>	<b>Primary Contact Name</b>	<b>Primary Contact Email</b>	<b>Primary Contact Phone</b>
<input type="text" value="---Select---"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Secondary contact</b>	<b>Secondary Contact Name</b>	<b>Secondary Contact Email</b>	<b>Secondary Contact Phone</b>
<input type="text" value="---Select---"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Date Promised</b>	<b>Date Released</b>	<b>Funding Date</b>	
<input type="text" value="04 / 23 / 2020"/>	<input type="text" value="04 / 23 / 2020"/>	<input type="text" value="04 / 23 / 2020"/>	
<b>Purpose Of Funding</b>	<b>Funding Method</b>	<b>Funding Account No</b>	
<input type="text"/>	<input type="text" value="-----"/>	<input type="text"/>	
<b>Receipt No</b>	<b>Payment Done By</b>	<b>To Account No</b>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Account Holder Name</b>	<input type="text"/>		
<b>Notes</b>			
<input type="text"/>			
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

## 19. PAYMENTS MODULE

The **Payments** module displays a list of payments processed or that are currently under process against various invoice records, in a grid format. The screen shown below is displayed when a user clicks on this module from the main header.

## Payment Details

Create

Select All <input type="checkbox"/>	Grant ▾	Deliverable ▾	Invoice ▾	Payment No ▾	Payment Amount(\$) ▾	Payment Date ▾	Status ▾	Actions
<input type="checkbox"/>	Ab grant	fundings	lg funds invoice	GMS-Payment-2020-05-25-549305	0	05/25/2020	active	
<input type="checkbox"/>	Releif fund for Ampha cyclone	ampha cyclone	sivani	GMS-Payment-2020-05-22-887280	0	05/26/2020	active	
<input type="checkbox"/>	Ab grant	fundings	lg funds invoice	GMS-Payment-2020-05-29-403155	9	05/29/2020	active	
<input type="checkbox"/>	Releif fund for Ampha cyclone	ampha cyclone	sivani	GMS-Payment-2020-05-29-836145	600	06/01/2020	active	
<input type="checkbox"/>	funding for small houses	Bhaghavathula charitable trust	Bhaghavathula charitable trust	GMS-Payment-2020-05-29-836145	0	06/02/2020	active	
<input type="checkbox"/>	Virus eradication program	Rishi	Rishi	GMS-Payment-2020-06-07-756820	500	06/08/2020	active	
<input type="checkbox"/>	Clinical research center	Rohit	Rohit	GMS-Payment-2020-06-15-133500	900	06/16/2020	active	
<input type="checkbox"/>	Develop main component	Develop main component award deliverable	Main components inv	GMS-Payment-2020-06-16-678520	150	06/16/2020	active	

First
Previous
1
Next
Last

10 ▾

Showing 1 to 8 of 8 entries

Delete
Print

Choose format
▾

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new payment record in the system.

### 19.1 Create/Edit Payment

Click on **Create** button (as mentioned above) to add a new payment record for a particular invoice or click on **Edit** icon for an existing payment record to edit its details. The screen shown below is displayed when these actions are performed.

- ◆ Enter/select or edit details of the payment record in the fields provided.
- ◆ Add/edit details of a contact for the payment record. To add another contact record, click on the **Add New Contact** link (highlighted in below screen shot).
- ◆ Click on **Submit** button to complete adding a new payment record or to complete editing an existing payment record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## Payment - Create

<b>Program</b> <input type="text"/>	<b>Grant</b> <input type="text"/>	<b>Application</b> <input type="text"/>	<b>Award</b> <input type="text"/>
<b>Awardee</b> <input type="text"/>	<b>Deliverable</b> <input type="text"/>	<b>*Invoice</b> --Select--	<b>Grant Allocated amount (\$)</b> <input type="text" value="0"/>
<b>Balance amount (\$)</b> <input type="text" value="0"/>	<b>Invoice amount (\$)</b> <input type="text" value="0"/>	<b>Payment amount (\$)</b> <input type="text" value="0"/>	<b>Payment date</b> <input type="text" value="06 / 17 / 2020"/>
<b>Payment method</b> --Select--	<b>From account number</b> <input type="text"/>	<b>Receipt No/Voucher No/Cheque No</b> <input type="text"/>	
<b>Payment done by</b> --Select--	<b>To account number</b> <input type="text"/>	<b>Account holder name/ Name of Cheque</b> <input type="text"/>	
<b>Comments</b> <input type="text"/>			
<b>Contacts</b>			
<b>Primary contact</b> --Select--	<b>Primary Contact Name</b> <input type="text"/>	<b>Primary Contact Email</b> <input type="text"/>	<b>Primary Contact Phone</b> <input type="text"/>
<b>Secondary contact</b> --Select--	<b>Secondary Contact Name</b> <input type="text"/>	<b>Secondary Contact Email</b> <input type="text"/>	<b>Secondary Contact Phone</b> <input type="text"/>
<b>Status</b> <input type="text" value="active"/>			
<b>Submit</b> <b>Cancel</b>			

Add New Contact





## 20. REPORTS MODULE

The **Reports** module allows a user to generate the following reports.

1. Application Summary Report
2. Budget Allocation Report
3. Deliverable Summary Report
4. Grants, Applications and Awards Statistical Report
5. Grant Summary Report
6. Invoice Summary Report
7. Organization Award Allocation Report
8. Invoice and Payment Details Report
9. Grant Funding Report
10. Program Funding Report
11. Federal Grant Report

### 20.1 Application Summary Report

The **Application Summary Report** provides a summary of the grant applications filed for a selected time range.

## Application Summary Reports

<b>From Date</b>	<b>To Date</b>	<b>Submit</b>
<input type="text" value="mm / dd / yyyy"/>	<input type="text" value="mm / dd / yyyy"/>	<input type="button" value="Submit"/>

- ◆ Select the **From Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Select the **To Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Click on **Submit** button to generate the report for the selected time range.

#### Generated Report:

The generated report is displayed as a grid as shown below.

Select All <input type="checkbox"/>	Application <span style="float: right;">▾</span>	Program <span style="float: right;">▾</span>	Organization <span style="float: right;">▾</span>	Grant <span style="float: right;">▾</span>	Status <span style="float: right;">▾</span>
<input type="checkbox"/>	appying for covid emergency fund	Environmental	Ganti Foundation	Maryland Small Business COVID-19 Emergency Relief Grant Fund	Returned Due To Incompletion
<input type="checkbox"/>	Another program	another program	Ganti Foundation	AIDS charity foundation	Full Application Draft
<input type="checkbox"/>	22	Medical	funds for small scale industries	funding for small houses	Full Application Draft
<input type="checkbox"/>	Application for Aids charity foundation	Environmental	funds for small scale industries	Maryland Small Business COVID-19 Emergency Relief Grant Fund	Full Application Draft
<input type="checkbox"/>	Medical	another program	funds for small scale industries	AIDS charity foundation	Full Application Draft
<input type="checkbox"/>	orphan fund	Inventory offer program	Releif fund for Ampha cyclone	inv grant	Full Application Draft
<input type="checkbox"/>	Releif fund for Ampha cyclone	Inventory offer program	Releif fund for Ampha cyclone	Releif fund for Ampha cyclone	Full Application Draft
<input type="checkbox"/>	covid funds1	give money to poor	Ganti Foundation	funds for covid affected areas	Full Application Draft
<input type="checkbox"/>	funding for charity	Test Program	Ganti Foundation	funding for charity	Full Application Draft
<input type="checkbox"/>	JD Test1	Judicial	Ganti Foundation	judicial grant 2	Full Application Draft

First
Previous
1
2
Next
Last

10 ▾

Showing 1 to 10 of 18 entries

Print

## 20.2 Budget Allocation Report

The **Budget Allocation Report** provides a summary information on the budget allocated for various grant application in the selected time range.

# Budget Allocation Report

**Start Date**

**End Date**

Submit

- ◆ Select the **Start Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Select the **End Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Click on **Submit** button to generate the report for the selected time range.

## 20.3 Deliverables Summary Report

The **Deliverables Summary Report** provides a summary information regarding the deliverables submitted for various grant awards in the selected time range.

### Deliverables Summary Reports



The screenshot shows a form with two date input fields labeled "Start Date" and "End Date", each containing the placeholder text "mm/dd/yyyy". To the right of these fields is a red "Submit" button.

- ◆ Select the **Start Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Select the **End Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Click on **Submit** button to generate the report for the selected time range.

## 20.4 Grants, Applications and Awards Statistical Report

The **Grants, Applications and Awards Statistical Report** provides an overall statistics on how many applications were filed for each grant under a program. It provides information in the form of a pie chart as well as in the form of grids for each grant under the selected program.

### Grants, Applications and Awards Statistical Reports

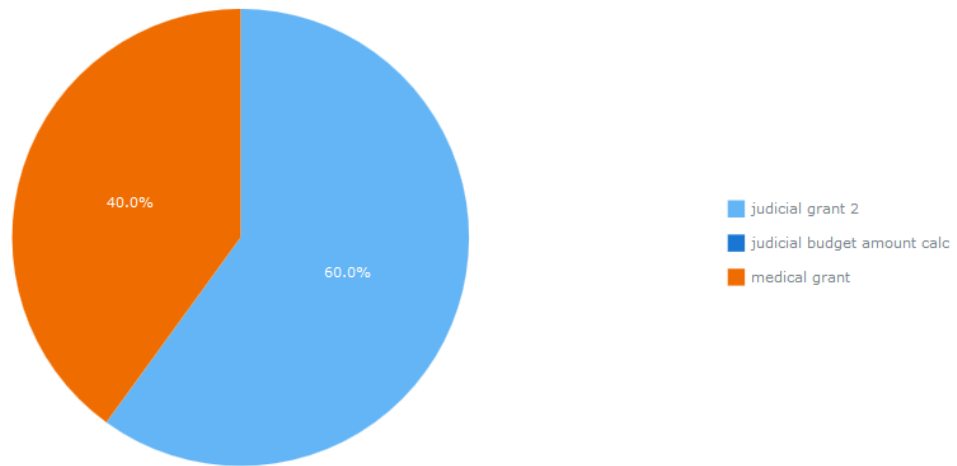


The screenshot shows two dropdown menus. The first is labeled "Programs" and contains the text "Please select a Program". The second is labeled "Grants" and contains the text "Please select a Grant".

- ◆ Select a program from the **Programs** drop-down to dynamically generate a report for the selected program.
- ◆ Select a grant from the **Grants** drop-down to filter the results of the generated report based on the selected grant.

**Generated Report:**

Grants sorted by popularity for program: Judicial



AnyChart Trial Version

## judicial grant 2

Application	Status	Actions
JD Test1	Full Application Draft	<a href="#">View</a>
judicial application 2	Full Application Draft	<a href="#">View</a>
JD2	Full Application Draft	<a href="#">View</a>

## medical grant

Application	Status	Actions
test2	Full Application Submitted	<a href="#">View</a>
AAA	Full Application Submitted	<a href="#">View</a>

- ◆ The first section of the generated report displays a pie chart that provides an information on percentage of applications filed for each grant under the selected program.
- ◆ The second section of the generated report displays grids for each grant under the selected program, with details about *Application Name* and its *Status*.
- ◆ Click on **Print** button (provided under pie chart) to print full details of the report along with the pie chart.
- ◆ Click on **View** link (highlighted in above screen shot) under the *Actions* column to go to that particular application page.

## 20.5 Grants Summary Report

The **Grants Summary Report** provides a summary information on grants under each program, under each department.

### Grants Summary Report

Department	Program	Grant	Status
Please select a Department ▾	Please select a Program ▾	Please select a Grant ▾	Please select a Status ▾
<b>Submit</b> <b>Reset</b>			

- ◆ Select a **Department** from the drop-down for which the report needs to be generated.
- ◆ Select a **Program** from the drop-down for which the report needs to be generated.
- ◆ Select a **Grant** from the drop-down for which the report needs to be generated.
- ◆ Select a **Status** from the drop-down for the grant status for which the report needs to be generated.
- ◆ Click on **Submit** button to generate the report based on the selected parameters.
- ◆ Click on **Reset** button to reset the data selected in the fields provided.

## 20.6 Invoice Summary Report

The **Invoice Summary Report** provides a summary information regarding the invoice records submitted for various deliverables in the selected time range.

### Invoice Summary Reports

From Date	To Date	
mm / dd / yyyy	mm / dd / yyyy	<b>Submit</b>

- ◆ Select the **From Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Select the **To Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Click on **Submit** button to generate the report for the selected time range.

## 20.7 Organization Award Allocation Report

The **Organization Award Allocation Report** provides a summary information on the grants awarded to various organizations in the selected time range.

### Organization Award Allocation Reports

<b>From Date</b>	<b>To Date</b>	<b>Submit</b>
<input type="text" value="mm / dd / yyyy"/>	<input type="text" value="mm / dd / yyyy"/>	

- ◆ Select the **From Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Select the **To Date** for the report to be generated. Clicking on this field shall open a calendar from where a user can select a date.
- ◆ Click on **Submit** button to generate the report for the selected time range.

## 20.8 Invoice and Payment Details Report

The **Invoice and Payment Details Report** provides a summary information on the invoice and payment details of various applications under a grant. This report can be generated for a particular application under a specific grant, under a specific program, under a specific department, and for a selected time range.

## Invoice and Payment Details Report

<b>Department</b> Please select a Department ▾	<b>Program</b> Please select a Program ▾	<b>Grant</b> Please select a Grant ▾	<b>Application</b> Please select an Application ▾
<b>Start Date</b> mm / dd / yyyy	<b>End Date</b> mm / dd / yyyy		
<b>Submit</b> <b>Reset</b>			

- ◆ Select the **Department**, **Program**, **Grant**, and **Application** from the drop-downs provided.
- ◆ Select the **Start Date** and **End Date** for the report to be generated.
- ◆ Click on **Submit** button to generate the report based on selected parameters.
- ◆ Click on **Reset** button to reset the data selected in the fields provided.

### 20.9 Grant Funding Report

The **Grant Funding Report** provides a summary information on the various funding available for the grants of a program, under a department.

## Grants Funding

<b>Departments</b> Please select a Program ▾	<b>Programs</b> Please select a Program ▾
---	--

- ◆ Select the **Department** and the **Program** from the drop-downs provided.
- ◆ The report shall be generated dynamically based on the selections made.

## 20.10 Program Funding Report

The **Program Funding Report** provides a summary information on the funding available for a program under a department.

### Programs Funding

<b>Departments</b>	<b>Programs</b>
Please select a Program	Please select a Program

- ◆ Select the **Department** and the **Program** from the drop-downs provided.
- ◆ The report shall be generated dynamically based on the selections made.

## 20.11 Federal Grant Report

The **Federal Grant Report** provides a summary information on the Federal grants available for a program under a department.

### Federal Grant Report

<b>Departments</b>	<b>Programs</b>	<b>Funding Type</b>
Please select a Program	Please select a Program	Federal

- ◆ Select the **Department** and the **Program** from the drop-downs provided.
- ◆ The report shall be generated dynamically based on the selections made.



## 21. SUPER FOOTER FUNCTIONALITIES

The **Super Footer** in the GMS portal provides some additional functionalities to a GMS user. Currently the access to most of the functionalities in the super footer are restricted to only System Admin user role.



Although the access to most of the functionalities in the super footer is currently limited to System Admin user role only, however, access to these functionalities can be configured for each user role of the GMS portal, as required, by the Administrator.

### 21.1 Expenditure

The **Expenditure** module displays a list of all the expenditures registered in the system, in a grid format, for all the grants. The screen shown below is displayed when a user clicks on this module from the super footer.

## Expenditure

Create

Select All <input type="checkbox"/>	Application ↕	Award ↕	Category ↕	Budget(\$) ↕	Added to Deliverable ↕	Actions
<input type="checkbox"/>	demo application 2	demo grant 2 award	None	6,000	Yes	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	demo application	demo grant 1 award	None	4,000	No	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	Application for demo grant	Grant for demo program award	None	300	Yes	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	For small business	Small business grants award	Consultants / Contacts	10,000	Yes	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	Main component by arampi	Develop main component award	Supplies	200	Yes	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	Clinical research center	Clinical research center award	Personal / Fringe Benefits	90,000	No	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	cricket for poor	Ab grant award	None	100,000	No	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	Vaccin for carona	Rishi	Personal / Fringe Benefits	100,000	No	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	covid awarness	Covid Awarness program award	Consultants / Contacts	100,000	No	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>
<input type="checkbox"/>	Vaccin for carona	Rishi	Consultants / Contacts	100,000	No	<span>👁</span> <span>✎</span> <span>🗑</span> <span>🗑</span>

First Previous 1 2 3 Next Last

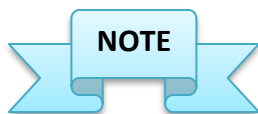
10

Showing 1 to 10 of 30 entries

Note: Please select records with same award while adding to the deliverable.



- ◆ Click on **Create** button (top right corner of the grid) to add a new expenditure in the system.
- ◆ Click on **Add to Deliverable** button (highlighted in above screen shot) to add one or more expenditure records to a deliverable of a grant. To do so, select the check box next to one or more expenditure records, and then click on Add to Deliverable button. This shall open a window, where user can select a particular grant to be associated with the selected expenditure records.



**When adding multiple expenditure records to a deliverable using the 'Add to Deliverable' option, please select records from a single award.**

### 21.1.1 Create/Edit Expenditure

Click on **Create** button (as mentioned above) to add a new expenditure record for a particular grant or click on **Edit** icon for an existing expenditure record to edit its details. The screen shown below is displayed when these actions are performed.

## Expenditure - Create

The screenshot shows the 'Expenditure - Create' form. It includes the following fields and sections:

- Grant**: Dropdown menu.
- Application**: Dropdown menu.
- \*Award**: Dropdown menu with "--Select--".
- Awardee**: Text input field.
- Category**: Dropdown menu with "--Select--".
- Subcategory**: Dropdown menu with "--Select--".
- Expenditure type**: Dropdown menu with "--Select--".
- \*Expenditure amount (\$)**: Text input field with "0" and a spinner.
- Start date**: Text input field with "06 / 19 / 2020" and a calendar icon.
- End date**: Text input field with "06 / 19 / 2020" and a calendar icon.
- Contacts**: Section with a red "Add New Contact" link (highlighted by a green arrow) and input fields for:
  - Primary contact: Dropdown menu with "--Select--".
  - Primary Contact Name: Text input field.
  - Primary Contact Email: Text input field.
  - Primary Contact Phone: Text input field.
  - Secondary contact: Dropdown menu with "--Select--".
  - Secondary Contact Name: Text input field.
  - Secondary Contact Email: Text input field.
  - Secondary Contact Phone: Text input field.
- Description**: Large text area.
- Submit** and **Cancel**: Red buttons at the bottom.

- ◆ Enter/select or edit details of the expenditure record in the fields provided.
- ◆ Add/edit details of a contact for the expenditure record. To add another contact record, click on the **Add New Contact** link (highlighted in above screen shot).
- ◆ Click on **Submit** button to complete adding a new expenditure record or to complete editing an existing expenditure record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.2 Funding Source

The **Funding Source** module displays a list of the all the funding sources, in a grid format, available to various programs, under various departments. The screen shown below is displayed when a user clicks on this module from the super footer.

### Funding sources

Create

Select All <input type="checkbox"/>	Name ↕	Type ↕	Email ↕	Website ↕	Actions
<input type="checkbox"/>	BG Inc	Firm	vskpissi@gmail.com	None	
<input type="checkbox"/>	WHO	Firm	who@gmail.com	www.who.co.in	
<input type="checkbox"/>	BG Inc	Firm	vskpissi@gmail.com	None	
<input type="checkbox"/>	Swarna Bharat	Firm	swarnabharat@gmail.com	www.swarnabharatrust.com	
<input type="checkbox"/>	Abhishek Rampi	Individual	arampi@issi-software.com	vizag	
<input type="checkbox"/>	BG Inc	Firm	vskpissi@gmail.com	None	
<input type="checkbox"/>	Little smiles	Individual	littlesmiles@gmail.com	43565467	
<input type="checkbox"/>	Peri Organization	Firm	speri@issi-software.com	www.issi-software.com	
<input type="checkbox"/>	BG Inc	Firm	vskpissi@gmail.com	www.issi.com	
<input type="checkbox"/>	BG Inc	Firm	vskpissi@gmail.com	baltimore	

First Previous 1 2 Next Last

Showing 1 to 10 of 16 entries

Delete
Print

Choose format
▾

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new funding source in the system.

### 21.2.1 Create/Edit Funding Source

Click on **Create** button (as mentioned above) to add a new funding source record for a particular program or click on **Edit** icon for an existing funding source record to edit its details. The screen shown below is displayed when these actions are performed.

## Funding source - Create

<b>Source Type</b> <input type="text" value="Firm"/>	<b>Name*</b> <input type="text"/>	<b>Email*</b> <input type="text"/>
<b>Phone Number</b> <input type="text"/>	<b>Website</b> <input type="text"/>	<b>FEIN</b> <input type="text"/>
<b>License</b> <input type="text"/>	<b>Within USA</b> <input checked="" type="radio"/> Yes <input type="radio"/> No	
<b>Contact First Name</b> <input type="text"/>	<b>Contact Last Name</b> <input type="text"/>	<b>Contact Email</b> <input type="text"/>
<b>Contact Phone Number</b> <input type="text"/>	<b>City</b> <input type="text"/>	<b>State</b> <input type="text" value="---Select---"/>
<b>County</b> <input type="text" value="---Select---"/>	<b>Zip</b> <input type="text"/>	
<b>Address</b> <input type="text"/>		
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

- ◆ Enter/select or edit details of the funding source record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new funding source record or to complete editing an existing funding source record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### 21.2.2 View Funding Source

Click on **View** icon for a funding source record to view its details along with information regarding the *Commitment* provided by the funding source. The screen shown below is displayed when a user clicks on view icon for a particular funding source record.

The *Funding Source Commitment* provides information on how much the funding source (entity) is willing to commit to fund a particular program.

## Funding source - Abhishek Rampi

Back

**Source Type** Individual

**Name** Abhishek Rampi

**Email** arampi@issi-software.com

**Phone Number** 8977463039

**Website** vizag

**Address**

### Funding source Commitment

Create Commitment

Source Name	Commitment amount(\$)	Commitment date	Status	Actions
Abhishek Rampi	5,000	June 16, 2020	Active	✎ 🗑

First
Previous
1
Next
Last

10

Showing 1 to 1 of 1 entries

**Total:** 5,000\$  
**Balance:** 0\$

- ◆ Click on **Create Commitment** button to add a new commitment from the funding source.

### 21.2.3 Create/ Edit Funding Source Commitment

Click on **Create Commitment** button (as mentioned above) to add a new funding source commitment record for a funding source or click on **Edit** icon for an existing funding source commitment record to edit its details. The screen shown below is displayed when these actions are performed.

### Funding Source Commitment - Create

**\*Funding source**

Abhishek Rampi

**\*Commitment amount(\$)**

0

**Commitment date**

06/19/2020

**Balance amount(\$)**

0

**Description**

Submit
Cancel

- ◆ Enter/select or edit details of the funding source commitment record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new funding source commitment record or to complete editing an existing funding source commitment record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.3 Users

The **Users** module displays a list of available users in the GMS portal. It allows a user to add/edit user details and user profile. It also allows a user to reset password for his/her user account. The screen shown below is displayed when a user clicks on this module from the super footer.

### Users

**Create**
**Roles**

Select All	Name	Username	Profile	Role	Super	Staff	Active	Action
<input type="checkbox"/>	abhishek r	abhishek347	View	Grantee	False	False	True	
<input type="checkbox"/>	Admin WAB	admin	View	System Administrator	True	True	True	
<input type="checkbox"/>	Anil F	Anil	View	Applicant	False	False	True	
<input type="checkbox"/>	Anil 1 F	Anils	View	Applicant	False	False	True	
<input type="checkbox"/>	anils susarla	anils	View	Applicant	False	False	True	
<input type="checkbox"/>	AOC Webmaster	testaoc	Add	Not Specified	False	False	True	
<input type="checkbox"/>	Aravind S	Aravind	View	Applicant	False	False	True	
<input type="checkbox"/>	Arjun D	Arjun	View	Applicant	False	False	True	
<input type="checkbox"/>	Bharadwaj Aryasomayajula	abharadwaj	View	System Administrator	True	True	True	
<input type="checkbox"/>	Charan G	Charan	View	Applicant	False	False	True	

First Previous 1 2 ... 7 Next Last
10
Showing 1 to 10 of 65 entries

Send Custom Email
Print
Choose format
Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new user in the GMS portal.
- ◆ Click on **Roles** button (top right corner of the grid) to add/edit user roles of the GMS portal. More about Roles module is explained in **Section 21.4**.
- ◆ Click on **Send Custom Email** button (provided below the grid) to send custom email to selected users from the grid.

### 21.3.1 Create/Edit User

Click on **Create** button (as mentioned above) to add a new user in the GMS portal or click on **Edit** icon for an existing user record to edit its details. The screen shown below is displayed when these actions are performed.

#### User - Create

Required Fields (\*)

Username\* Password\* Confirm Password\*

First name\* Last name\* Email\*

Mobile Number\* Address\* City\*

State\* County\* Zipcode\*

Organization Userrole

create Cancel

- ◆ Enter/select or edit details of the user record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new user or to complete editing an existing user record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### 21.3.2 View User Record

Click on **View** icon for a user record to view its details. The view user record page also allows to make edits to user profile. The screen shown below is displayed when a user clicks on view icon for a particular user record.



## User

<b>Back</b>	<b>Username</b>	abhishekrampi
<b>Profile</b>	<b>Name</b>	abhishek r
<b>Password</b>	<b>Email</b>	abhishekabhi347@gmail.com
<b>Edit</b>	<b>Profile</b>	<a href="#">View Profile</a>
	<b>Superuser</b>	False
	<b>Staff</b>	False
	<b>Last Login</b>	May 18, 2020, 11:07 p.m.
	<b>Status</b>	True
	<b>Groups</b>	Applicants
	<b>Permissions</b>	

- ◆ Click on **Back** button in the left menu to go back to users' grid page.
- ◆ Click on **Profile** button in the left menu or the **View Profile** link (highlighted in above screen shot) to go to the user profile page.
- ◆ Click on **Password** button in the left menu to go to Change Password page for that particular user record.
- ◆ Click on **Edit** icon to go to edit user details page (as explained in **Section 21.3.1**)

### User Profile:

Clicking on **Profile** button in the left menu or **View Profile** link shall direct us to user profile page as shown below.

## User Profile

<b>User</b>	Full Name	Test Admin
<b>Password</b>	Username	testadmin
<b>Edit</b>	Type	Internal
	Role	System Administrator
	Organization	None
	Communication	Immediate

- ◆ Click on **User** button in the left menu to go back to user details page.
- ◆ Click on **Edit** button in the left menu to edit a user profile. Clicking on this button shall display the below screen.

## Edit Profile - Test Admin

Organization: [-----] Type: Internal Userrole: System Administrator Communication Option: Immediate

Description: [Empty text area]

Submit Back

- ◆ Enter/select or edit details of a user profile in the fields provided.
- ◆ Click on **Submit** button to complete editing a user profile. Click on **Back** button to cancel the process and return to previous screen.

### Password:

Clicking on Password button from the left menu shall direct us to the below page.

## User - Change Password

### testadmin

Profile

Edit

**Current Password:**

**Password:**

**Re-type Password:**

Change

- ◆ Enter the **Current Password** of the user account in the field provided.
- ◆ Enter the new **Password** for the user account in the field provided.
- ◆ Re-enter the new Password for the user account in the field provided.
- ◆ Click on **Change** button to complete changing the password for a user account.
- ◆ Click on **Profile** button in the left menu to go back to user profile page.

## 21.4 Roles

The **Roles** module displays a list of available user roles in the GMS portal. It allows a user to add/edit a user role, and set access to various modules/sub-modules and functionalities within the GMS portal. The screen shown below is displayed when a user clicks on this module from the super footer.

### Roles

Create
Users

Select All <input type="checkbox"/>	Role Code	Role Name	Actions
<input type="checkbox"/>	ACCNT	Accountant	
<input type="checkbox"/>	AOCWM	AOC Web Master	
<input type="checkbox"/>	APP	Applicant	
<input type="checkbox"/>	ASCA	Asst. State Court Administrator	
<input type="checkbox"/>	GADMIN	Grant Admin	
<input type="checkbox"/>	GR	Grantee	
<input type="checkbox"/>	GUEST	Guest (view only)	
<input type="checkbox"/>	LR	Legal Reviewer	
<input type="checkbox"/>	PRM	Procurement Manager	
<input type="checkbox"/>	PL	Program Lead	

First Previous 1 2 Next Last

10 ↕

Showing 1 to 10 of 16 entries



➔  
Delete

Choose format ▼

Export

- ◆ Click on **Create** button (top right corner of the grid) to create a new user role in the system.
- ◆ Click on **Users** button (top right corner of the grid) to go the users' page.
- ◆ Select check box next to one or more user roles in the grid, and click on **Delete** button (highlighted in above screen shot) to delete them from the system.

**Icons in the Actions Column:**

Icon	Functionality
	<b>Functional Management:</b> allows to add/edit functionalities, within GMS portal, for a user role.
	<b>Menu Management:</b> allows to add/edit access to various modules/sub-modules of GMS portal for a user role.

**21.4.1 Create/Edit Role**

Click on **Create** button (as mentioned above) to add a new user role in the GMS portal or click on **Edit** icon for an existing user role record to edit its details. The screen shown below is displayed when these actions are performed.

**Role - Create**

**\*General Group**

**\*Rolename**

**\*Rolecode**

**Description**

Submit

Cancel

- ◆ Enter/select or edit details of the user role record in the fields provided.

- ◆ Click on **Submit** button to complete adding a new user role or to complete editing an existing user role record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.4.2 Functional Management

The **Functional Management** module allows us to configure access to various functionalities in each module/sub-module, within the GMS portal, for a user role. The screen shown below is displayed when a user clicks on this icon for a particular user role.

### Functional Management

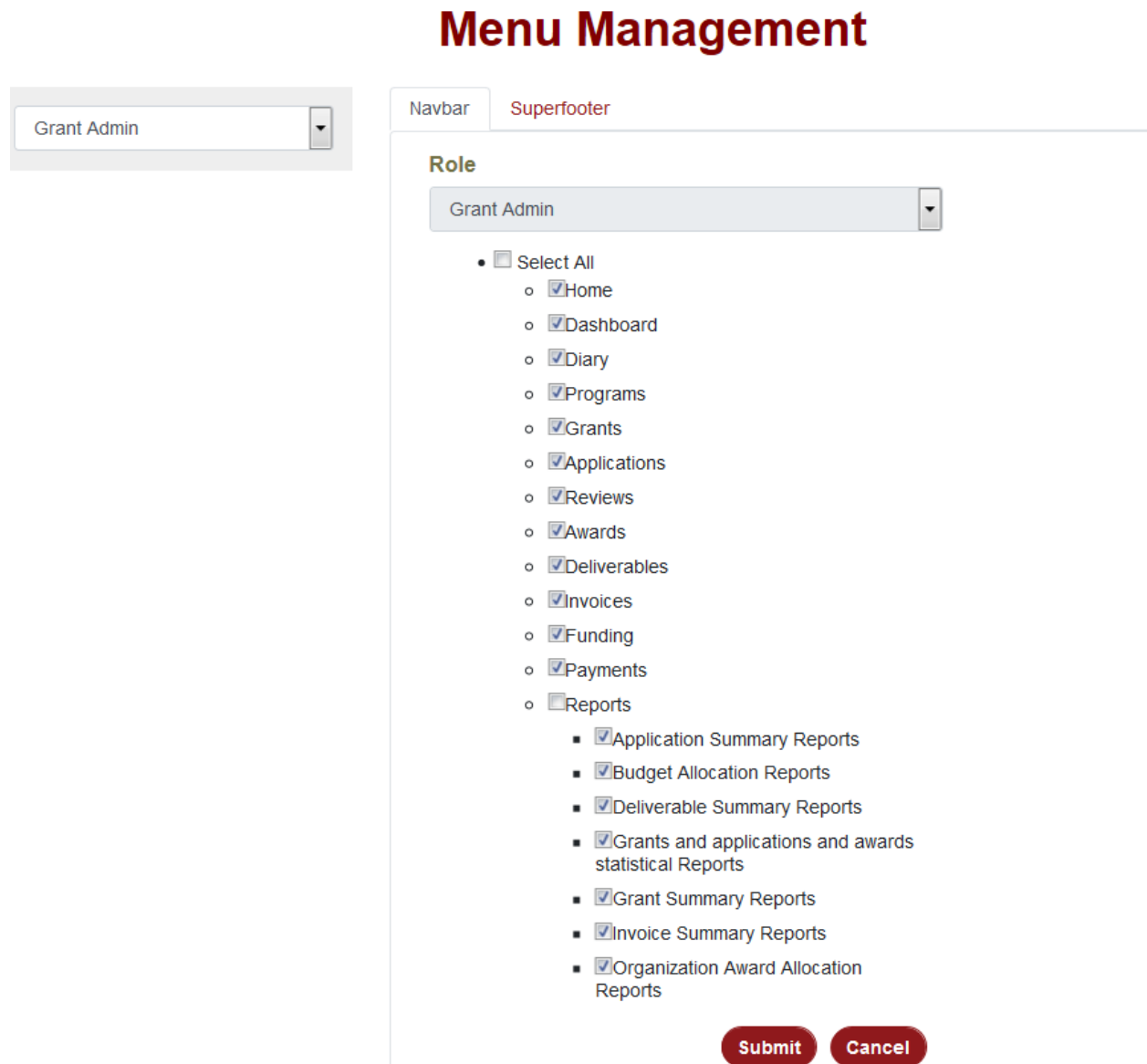
Name	Module
GADMIN	applications

- Select All
  - AddNew
  - Edit
  - View
  - Delete
  - Print
  - Bulk Print
  - Bulk Delete
  - Bulk Export

- ◆ Select the module/sub-module from the drop-down in the left menu, for which the functionality access needs to be set for a particular user role.
- ◆ The **Name** field displays the user role name for which the functionalities are being edited.
- ◆ The **Module** field displays the module name (based on the selection from the drop-down in the left menu) for which the functionalities, accessible to user role, are being edited.
- ◆ Select/un-select the individual check boxes to provide or deny access to those functionalities within a module respectively. Click on **Select All** check box for a module to provide access to all functionalities within that module for a user role.
- ◆ Click on **Submit** button to complete editing functionality access to a user role based on the selected module.
- ◆ Click on **Back** button to cancel the process and return to previous screen.

### 21.4.3 Menu Management

The **Menu Management** module allows us to configure access to various modules/sub-modules, within the GMS portal, for a user role. The screen shown below is displayed when a user clicks on this icon for a particular user role.



- ◆ Select the User Role from the drop-down in the left menu for which the menu access needs to be set/edited.

- ◆ Under **Navbar** tab, select check boxes next to all the modules/sub-modules for which the access needs to be given to the selected user role.
- ◆ Repeat the above action for the user role under the **Super footer** tab, providing access to various modules in the super footer of the GMS portal.
- ◆ Click on **Submit** button to complete setting/editing access to menu items for a user role.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.5 Departments

The **Departments** module displays a list of departments, in a grid format, available in the grant issuing institution. A user can add/edit a department in this module, which is then used when creating a program or a grant. The screen shown below is displayed when a user clicks on this module from the super footer.

Departments

Create

Select All <input type="checkbox"/>	Name <span style="float: right;">⇅</span>	Status <span style="float: right;">⇅</span>	Actions
<input type="checkbox"/>	Humanatarian department	Active	<span style="font-size: 0.8em;">👁️</span> <span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🖨️</span> <span style="font-size: 0.8em;">🗑️</span>
<input type="checkbox"/>	Public Health	Active	<span style="font-size: 0.8em;">👁️</span> <span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🖨️</span> <span style="font-size: 0.8em;">🗑️</span>
<input type="checkbox"/>	Virology dep	Active	<span style="font-size: 0.8em;">👁️</span> <span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🖨️</span> <span style="font-size: 0.8em;">🗑️</span>
<input type="checkbox"/>	Virus infections Dept	Active	<span style="font-size: 0.8em;">👁️</span> <span style="font-size: 0.8em;">✎</span> <span style="font-size: 0.8em;">🖨️</span> <span style="font-size: 0.8em;">🗑️</span>

First
Previous
1
Next
Last

10
⇅

Showing 1 to 4 of 4 entries

Delete
Print

Choose format
▼
Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new department in the system.

### 21.5.1 Create/Edit Department

Click on **Create** button (as mentioned above) to add a new department in the GMS portal or click on **Edit** icon for an existing department record to edit its details. The screen shown below is displayed when these actions are performed.

## Department - Create

**\*Name**

**Description**

---

**Contacts** Add New Contact

<b>Primary contact</b>	<b>Primary Contact Name</b>	<b>Primary Contact Email</b>	<b>Primary Contact Phone</b>
<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Secondary contact</b>	<b>Secondary Contact Name</b>	<b>Secondary Contact Email</b>	<b>Secondary Contact Phone</b>
<input type="text" value="--Select--"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

**Status**

- ◆ Enter/select or edit details of the department record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new department or to complete editing an existing department record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.6 Workflows

The Workflow for any software application decides how a process, which the software intends to run and achieve a successful outcome at the end of it, should flow from first step to last step. In the case of GMS portal, the **Workflows** module allows a user to add/edit a workflow for a program, add/edit workflow rules, which is intended to achieve automation of the process and determine how a grant application should flow right from initiation to all the way to payments.

The screen shown below is displayed when a user clicks on this module from the super footer.



## Workflows

Create

Select All <input type="checkbox"/>	Program Name	WorkFlow Name	Description	Status	Actions
<input type="checkbox"/>	Environmental	AB		inactive	
<input type="checkbox"/>	Environmental	AB2		inactive	
<input type="checkbox"/>	test run	Another workflow by RM		active	
<input type="checkbox"/>	Test programs	clinical research center	test	active	
<input type="checkbox"/>	Human department dev	cricket for poor		active	
<input type="checkbox"/>	Test Program	Demo test by AB	Workflow for 'Test Program'	active	
<input type="checkbox"/>	Environmental	first one1		active	
<input type="checkbox"/>	test run	RM Workflow	Testing workflow	inactive	
<input type="checkbox"/>	Vaccin for corona	None		active	

First Previous 1 Next Last

10

Showing 1 to 9 of 9 entries

Delete
Print

Choose format
▼

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new workflow in the system.
- ◆ Click on the **Inactive** link under the *Status* column in the grid to activate a particular workflow for a program. **Note:** This action shall automatically deactivate the already active workflow for that program.



**Workflows are created at Program level. Multiple workflows can be created for a single program. However, only one workflow can be active for a program at any given point of time.**

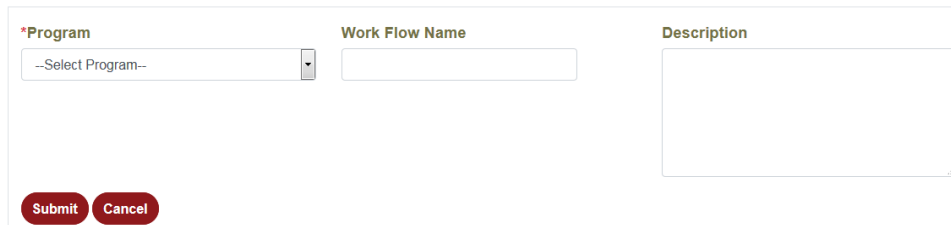
### Icons in the Actions Column:

Icon	Functionality
	<b>Workflow Rules:</b> allows a user to add/edit rules for a workflow.

## 21.6.1 Create/Edit Workflow

Click on **Create** button (as mentioned above) to add a new workflow for a particular program in the GMS portal or click on **Edit** icon for an existing workflow record to edit its details. The screen shown below is displayed when these actions are performed.

### Workflow - Create

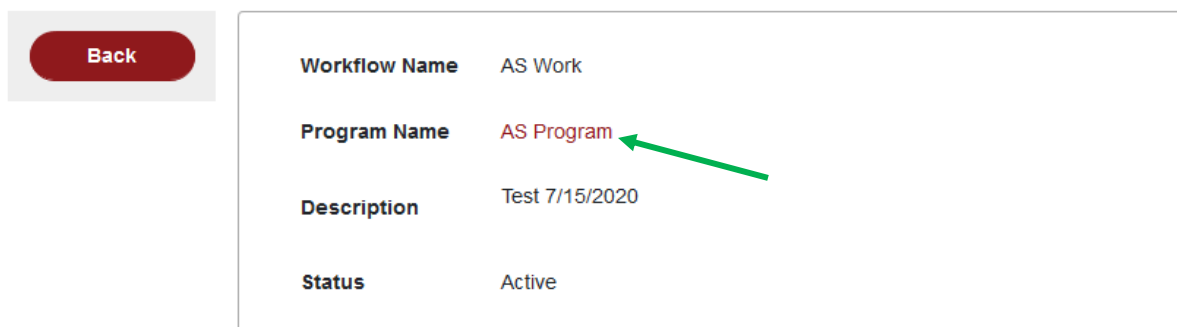


- ◆ Select/enter or edit details of the workflow record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new workflow or to complete editing an existing workflow record.
- ◆ Click on **Cancel** to cancel the process and return to previous screen.

## 21.6.2 View Workflow

Click on **View** icon for a workflow record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular workflow record.

### Workflow - AS Work



- ◆ Click on **Back** button in the left menu to go back to the workflow grid page.

- ◆ Click on the program link (highlighted in above screen shot) provided in the **Program Name** field to go to the view details page of that program.

### 21.6.3 Workflow Rules

Click on the **Workflow Rules** icon for a workflow record to set/edit rules that shall define the workflow. The screen shown below is displayed when a user clicks on this icon for a workflow record.

## Workflow Rules

Create

Select All <input type="checkbox"/>	Step No ⌵	Task to Perform ⌵	Task to Route ⌵	Task to Route (Declined) ⌵	Role ⌵	Workflow Status ⌵	Application Status ⌵	Actions
<input type="checkbox"/>	1	Application submission by Applicant	Online Review of Submitted application	None	Applicant	Grant Application Received	Application Received	👁️ 📄
<input type="checkbox"/>	2	Online Review of Submitted application	In-Person Review of Submitted application	None	Reviewer	Preliminary Online Review	Preliminary Online Review	👁️ 📄
<input type="checkbox"/>	3	In-Person Review of Submitted application	Final Preliminary Review of submitted application	None	Program Lead	Preliminary In-Person Review	Preliminary In-Person Review	👁️ 📄
<input type="checkbox"/>	4	Final Preliminary Review of submitted application	Grant Application under PA review	None	Program Manager	Under Review By Program Manager	Under Review By Program Manager	👁️ 📄
<input type="checkbox"/>	5	Grant Application under PA review	Grant Application Approved	None	Program Administrator	Under Review By Grant Admin	Under Review By PA	👁️ 📄
<input type="checkbox"/>	6	Grant Application Approved	Award documents sent to Grantee	None	Program Administrator	Grant Awarded	Grant Awarded	👁️ 📄
<input type="checkbox"/>	7	Award documents sent to Grantee	Signed documents and Final Budget Submitted by Grantee	None	Program Manager	Award Documents Sent	Award Documents Sent	👁️ 📄
<input type="checkbox"/>	8	Signed documents and Final Budget Submitted by Grantee	Award documents under review by Program Manager	None	Grantee	Award Documents Submitted by Grantee	Award Documents Submitted by Grantee	👁️ 📄
<input type="checkbox"/>	9	Award documents under review by Program Manager	Award documents approved by Program Manager	None	Program Manager	Under Review By Program Manager	Under Review by Program Manager	👁️ 📄
<input type="checkbox"/>	10	Award documents approved by Program Manager	Award documents under review by legal Team	None	Program Manager	Award Documents Approved by Program Manager	Award Documents Approved by Program Manager	👁️ 📄

First Previous 1 2 3 Next Last
10
Showing 1 to 10 of 24 entries

Delete
Print
Choose format ⌵
Export
Back to Workflow

- ◆ Click on **Create** button (top right corner of the grid) to add a new workflow rule for a workflow record.
- ◆ Click on **Back to Workflow** button to go back to the workflows grid page.

## 21.6.4 Create/Edit Workflow Rule

Click on **Create** button (as mentioned above) to add a new workflow rule for a workflow record or click on **Edit** icon for an existing workflow rule record to edit its details. The screen shown below is displayed when these actions are performed.

### WorkflowRule - Create

The screenshot shows the 'WorkflowRule - Create' form with the following fields and options:

- Stepno\***: Text input field containing the value '1'.
- Task to Perform\***: Dropdown menu with a blank selection.
- Task to Route (When Approved)\***: Dropdown menu with a blank selection.
- Set Application Status(When Approved)**: Text input field.
- Role to send application(When Approved)\***: Dropdown menu with a blank selection.
- Task to Route (When Declined)**: Dropdown menu with a blank selection.
- Set Application Status(When Declined)**: Text input field.
- Role to send application(When Declined)**: Dropdown menu with a blank selection.
- Work Flow Status**: Dropdown menu with a blank selection.
- Return To Applicant for changes(When Declined)**
- Immediate notification**
- Submit** and **Cancel** buttons.

- ◆ When creating a workflow rule, a user can specify the following things:

- ❖ Step No. → Indicates the step number of the workflow rule in the entire process.
- ❖ Task to Perform, Task to Route, Application Status, and Role to Send Application to – when grant application is **Approved**.
- ❖ Task to Perform, Task to Route, Application Status, and Role to Send Application to – when grant application is **Declined**.
- ❖ Workflow Status → Status of the workflow when the current rule is implemented.
- ❖ Return to Applicant for changes (when **Declined**) → This shall return the grant application to the Applicant if any changes are required in the application.
- ❖ Immediate Notification → This shall send an immediate notification to the concerned personnel as an when a workflow rule is implemented.
- ◆ Click on **Submit** button to complete adding a new workflow rule or to complete editing an existing workflow rule record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.7 Workflow Status

The **Workflow Status** module displays a list of available workflow statuses in the GMS portal. The screen shown below is displayed when a user clicks on this module from the super footer.

### Workflow status

Create

Select All <input type="checkbox"/>	Name	Status	Actions
<input type="checkbox"/>	Additional Funds Approved	Active	
<input type="checkbox"/>	Additional Funds Approved By Program Manager	Active	
<input type="checkbox"/>	Additional Funds Requested	Active	
<input type="checkbox"/>	Additional Funds Request Under Review by Asst. Administrator	Active	
<input type="checkbox"/>	Additional Funds Request Under Review by Grant Admin	Active	
<input type="checkbox"/>	Additional Funds request Under Review By Program Manager	Active	
<input type="checkbox"/>	Additional Funds Declination Letter Dispatched	Active	
<input type="checkbox"/>	Additional Information Received	Active	
<input type="checkbox"/>	Approved Supplemental Award Letter Received	Active	
<input type="checkbox"/>	Award Agreement Dispatched	Active	

First Previous 1 2 ... 7 Next Last

10

Showing 1 to 10 of 65 entries

Print

- ◆ Click on **Create** button (top right corner of the grid) to add a new workflow status in the system.

### 21.7.1 Create/Edit Workflow Status

Click on **Create** button (as mentioned above) to add a new workflow status or click on **Edit** icon for an existing workflow status record to edit its details. The screen shown below is displayed when these actions are performed.

### Workflowstatus - Create

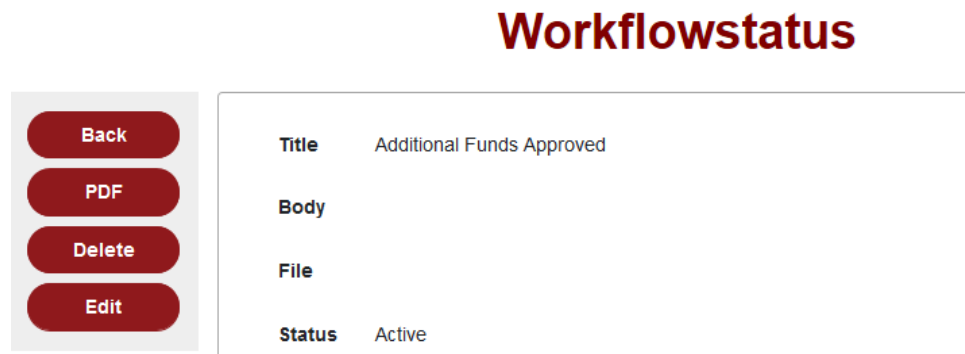


- ◆ Enter/select or edit details of the workflow status record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new workflow status or to complete editing an existing workflow status record.
- ◆ Click on **Back** button in the left menu to go back to workflow status grid page.

### 21.7.2 View Workflow Status

Click on **View** icon for a workflow status record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular workflow status record.

### Workflowstatus



<b>Title</b>	Additional Funds Approved
<b>Body</b>	
<b>File</b>	
<b>Status</b>	Active

- ◆ Click on **Back** button in the left menu to go back to the workflow status grid page.
- ◆ Click on **PDF** button in the left menu to open workflow status details in a PDF file from where a user can print the information.
- ◆ Click on **Delete** button in the left menu to delete a workflow status record.
- ◆ Click on **Edit** button in the left menu to go to edit page of a workflow status.

## 21.8 Application Questions

The **Application Questions** module displays a list of available questions, in a grid format, which are asked to an applicant when applying for a grant. It allows a user to add/edit an application question for a grant under a program.

The screen shown below is displayed when a user clicks on this module from the super footer.

### Application Questions

Create

Select All <input type="checkbox"/>	Program	Grant	Question	Type	Status	Actions
<input type="checkbox"/>	Test Program	Vizag gas fund	how much is the fund	Text Field	active	
<input type="checkbox"/>	Test Program	funding for medicines	when the fund will be allocated to the affected people	Dropdown	active	
<input type="checkbox"/>	Test Program	Vizag gas fund	When is distribution	Dropdown	active	
<input type="checkbox"/>	Test Program	funding for medicines	fund not received	Yes or No Radio Buttons	active	
<input type="checkbox"/>	Test Program	medical grant	how much is the fund	Text Field	active	
<input type="checkbox"/>		Vizag gas fund	How much Gas?	Dropdown	active	
<input type="checkbox"/>	Test Program	funding for charity	how much is charity fund	Text Field	active	
<input type="checkbox"/>	Test Program	funding for charity	how much is charity fund	Dropdown	active	
<input type="checkbox"/>	Test Program	funding for charity	how much is charity fund	Yes or No Radio Buttons	inactive	
<input type="checkbox"/>	Medical	funding for small houses	how much is charity fund	Yes or No Radio Buttons	active	

First Previous 1 2 3 4 5 Next Last

10

Showing 1 to 10 of 47 entries

Make Inactive
Print

Choose format

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new application question in the system for a grant.
- ◆ To deactivate one or more application questions in the grid, select the check boxes next to the application questions and click on **Make Inactive** button (highlighted in above screen shot).

## 21.8.1 Create/Edit Application Question

Click on **Create** button (as mentioned above) to add a new application question for a grant or click on **Edit** icon for an existing application question record to edit its details. The screen shown below is displayed when these actions are performed.

### Application question - Create

The screenshot shows a form titled "Application question - Create". It contains several input fields and dropdown menus. The fields are: \*Question (text input), Type (dropdown menu with "Text Field" selected), Program (dropdown menu with "--Select--"), Grant (dropdown menu with "--Select--"), Size (dropdown menu with "1/3 Row"), \*Score range (dropdown menu with "--Select--"), and Status (dropdown menu with "active"). There is also a checkbox labeled "Required" which is checked. At the bottom, there are two buttons: "Submit" and "Cancel".

- ◆ Enter/select or edit details of the application question record in the fields provided.
- ◆ For the **Type** field, select an appropriate option from the drop-down. When the option is selected as "Dropdown", an additional field **Options** is displayed as highlighted in below screen shot.

### Application question - Create

This screenshot is similar to the previous one, but the "Type" dropdown menu is set to "Dropdown". Below the "Status" field, a new section titled "Options (Note: To remove option just clear the field)" is visible. This section contains a "+ Add Option" button. The "Required" checkbox remains checked. The "Submit" and "Cancel" buttons are still present at the bottom.



- ◆ Click on **Add Option** button to add options that will appear as values in the drop down for a particular application question.
- ◆ The **Required** field (highlighted in above screen shot) is used to indicate if an application question is mandatory or not.
- ◆ The **Score Range** field is used to specify the range of score for an application question, which the reviewers shall use to evaluate the answer provided by an applicant for that particular question when applying for a grant.
- ◆ The **Size** field is used to define the length of the text box, or drop down on the application question page.
- ◆ Click on **Submit** button to complete adding a new application question for a grant or to complete editing an existing application question record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.8.2 View Application Question

Click on **View** icon for an application question record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular application question record.

### Application question - when the fund will be allocated to the affected people

<b>Program</b>	Test Program
<b>Grant</b>	funding for medicines
<b>Question</b>	when the fund will be allocated to the affected people
<b>Type</b>	Dropdown
<b>Size</b>	4
<b>Required</b>	True
<b>Options</b>	fund will be released to them - dropdown 1 months test3
<b>Status</b>	Active

- ◆ Click on **Back** button in the left menu to go back to the application questions grid page.
- ◆ Click on **PDF** button in the left menu to open details of an application question in a PDF file from where a user can print the information.
- ◆ Click on **Delete** button in the left menu to delete an application question record.
- ◆ Click on **Edit** button in the left menu to go to edit page of an application question.

## 21.9 Documents

The **Documents** module displays a list of all available documents in the system in a grid format. The module allows a user to add/edit a document associated with a particular grant application. The screen shown below is displayed when a user clicks on this module from the super footer.

### Documents

Create

Select All <input type="checkbox"/>	Name ↕	Application ↕	Status ↕	Actions
<input type="checkbox"/>	ampha cyclone	Releif fund for Ampha cyclone	Active	
<input type="checkbox"/>	Bhaghavathula charitable trust	applications	Active	
<input type="checkbox"/>	Bhaghavathula charitable trust	Bhaghavathula charitable trust	Active	
<input type="checkbox"/>	Bhaghavathula charitable trust	Bhaghavathula charitable trust	Active	
<input type="checkbox"/>	Bhaghavathula charitable trust	Bhaghavathula charitable trust	Active	
<input type="checkbox"/>	Bhaghavathula charitable trust	Bhaghavathula charitable trust	Active	
<input type="checkbox"/>	Books Distrubution poor children	Bhaghavathula charitable trust	Active	
<input type="checkbox"/>	covid awarness	covid awarness	Active	
<input type="checkbox"/>	cricket docs	cricket for poor	Active	
<input type="checkbox"/>	demo document 2	demo application 2	Active	

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Next
Last

10

Showing 1 to 10 of 29 entries

Delete
Print

Choose format

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new document in the system.

### 21.9.1 Create/Edit Document

Click on **Create** button (as mentioned above) to add a new document in the system or click on **Edit** icon for an existing document record to edit its details. The screen shown below is displayed when these actions are performed.

## Document - Create

Document Name:

Application:

Source:

Author:

Confidential:

Exhibit:

Exhibit number:

File:  No files selected.

Notes:

- ◆ Enter/select or edit details of the document record in the fields provided.
- ◆ Click on **Browse** button (highlighted in above screen shot) to browse and upload a document from the local system.
- ◆ Click on **Submit** button to complete adding a new document or to complete editing an existing document record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### 21.9.2 View Document

Click on **View** icon for a document record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular document record.

## Document

**Document Name** Acknowledgement Document

**Application** Sports Application

**Author** None

**File** [documents/Acknowledgement\\_xPwWPNh.docx](#)

**Notes**

**Status** Active

- ◆ Click on **Back** button in the left menu to go back to the documents grid page.
- ◆ Click on **PDF** button in the left menu to open details of a document in a PDF file from where a user can print the information.
- ◆ Click on **Delete** button in the left menu to delete a document record.
- ◆ Click on **Edit** button in the left menu to go to edit page of a document.
- ◆ Click on the link provided in the **File** field to open the document.

## 21.10 Settings

The **Settings** module displays a list of settings, in a grid format, which are used to configure the GMS portal website. The screen shown below is displayed when a user clicks on this module from the super footer.

### Settings

Create

Title <span style="font-size: 0.8em;">⬇</span>	Status <span style="font-size: 0.8em;">⬇</span>	Actions
footerVersion	Active	
headerSubtitle	Active	
headerTitle	Active	
messageHome	Active	
messagePublic	Active	
superfooter2ContactLink	Active	
superfooter2Subtitle	Active	
superfooter2Title	Active	
Title	Active	

First
Previous
1
Next
Last

10 ⬇

Showing 1 to 9 of 9 entries

- ◆ Click on **Create** button (top right corner of the grid) to add a new setting for the GMS portal website.

### 21.10.1 Create/Edit Setting

Click on **Create** button (as mentioned above) to add a new setting for the GMS portal website or click on **Edit** icon for an existing setting record to edit its details. The screen shown below is displayed when these actions are performed.

## Setting - Create

The form contains the following fields and controls:

- Title:** A text input field with the placeholder text 'Title'.
- Status:** A dropdown menu with 'active' selected.
- Body:** A large text area for entering the setting's content.
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom center.

- ◆ Enter/select or edit details of the setting record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new setting or to complete editing an existing setting record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### 21.10.2 View Setting

Click on **View** icon for a setting record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular setting record.

## Setting

The view page displays the following details for a setting record:

<b>Title</b>	footerVersion
<b>Body</b>	Version Number: 1.4.2
<b>Status</b>	Active

- ◆ Click on **List** button in the left menu to go back to the settings grid page.
- ◆ Click on **Delete** button in the left menu to delete a setting record.
- ◆ Click on **Edit** button in the left menu to go to edit page of a setting record.

## 21.11 Letter Templates

The **Letter Templates** module displays a list of letter templates available, in a grid format, which shall be used during grant application process. The screen shown below is displayed when a user clicks on this module from the super footer.

### Templates

Search...

Create

Select All <input type="checkbox"/>	Title	Status	Actions
<input type="checkbox"/>	Acknowledgement letter	Active	
<input type="checkbox"/>	Default	Active	
<input type="checkbox"/>	Grant Agreement Template	Active	

First Previous 1 Next Last

10

Showing 1 to 3 of 3 entries

Delete Print

- ◆ Click on **Create** button (top right corner of the grid) to add a new letter template in the system.

### 21.11.1 Create/Edit Letter Template

Click on **Create** button (as mentioned above) to add a new letter template in the system or click on **Edit** icon for an existing letter template record to edit its details. The screen shown below is displayed when these actions are performed.

### Letter Template - Create

\*Letter Template Name

File  No file selected.

Status

Letter Template Description

Submit Cancel

- ◆ Enter/select or edit details of the letter template record in the fields provided.
- ◆ Click on the **Browse** button to select and upload a template document from the local system.
- ◆ Click on **Submit** button to complete adding a new letter template or to complete editing an existing letter template record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### 21.11.2 View Letter Template

Click on **View** icon for a letter template record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular letter template record.

## Template

<b>Title</b>	Grant Agreement Template
<b>Description</b>	
<b>File</b>	<a href="#">templates/GrantAgreementTemplate_ukzVZf7.docx</a>
<b>Status</b>	Active

**Back**

- ◆ Click on the **File** name (highlighted in above screen shot) to open the document/template.
- ◆ Click on **Back** button to go back to letter templates grid page.

### 21.12 Organizations

The **Organizations** module displays a list of all organizations that have applied for various grants in the past, in a grid format. It allows a user to add/edit an organization information. The screen shown below is displayed when a user clicks on this module from the super footer.

## Organizations

Search...

**Create**

Select All <input type="checkbox"/>	Name	Description	Status	Actions
<input type="checkbox"/>	Challapeta Organization		Active	
<input type="checkbox"/>	Sasi Kiran Org		Active	
<input type="checkbox"/>	Matrix Organization		Active	
<input type="checkbox"/>	BG Inc		Active	
<input type="checkbox"/>	Cricket foundation for poor children		Active	
<input type="checkbox"/>	Rural Development		Active	
<input type="checkbox"/>	Gate foundation for COVID		Active	
<input type="checkbox"/>	Funds for Rehabilitation Centers		Active	
<input type="checkbox"/>	Save Street Children		Active	
<input type="checkbox"/>	Vaccine for Carona		Active	

First Previous 1 2 ... 6 Next Last 10 Showing 1 to 10 of 56 entries

**Delete** **Print** Choose format **Export**

- ◆ Click on **Create** button (top right corner of the grid) to add a new organization in the system.

### 21.12.1 Create/Edit Organization

Click on **Create** button (as mentioned above) to add a new organization in the system or click on **Edit** icon for an existing organization record to edit its details. The screen shown below is displayed when these actions are performed.



## Organization - Create

<b>Name*</b>		<b>DUNS Number</b>
<input type="text"/>		<input type="text"/>
<b>Description</b>		
<input type="text"/>		
<b>Notes</b>		
<input type="text"/>		
<b>Address</b>		
<input type="text"/>		
<b>City</b>	<b>State</b>	<b>County</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Zip</b>	<b>Contact Name</b>	<b>Contact Email</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Contact Cell</b>	<b>Contact Office Number</b>	
<input type="text"/>	<input type="text"/>	
<b>File</b>	<b>Status</b>	
<input type="button" value="Browse..."/> No file selected.	<input type="text" value="active"/>	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

- ◆ Enter/select or edit details of the organization record in the fields provided.
- ◆ Click on the **Browse** button to select and upload a document from the local system in regard to an organization.
- ◆ Click on **Submit** button to complete adding a new organization or to complete editing an existing organization record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

## 21.12.2 View Organization

Click on **View** icon for an organization record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular organization record.

### Organization

Back

<b>Name</b>	BG Inc
<b>Description</b>	
<b>Address</b>	
<b>State</b>	
<b>County</b>	
<b>City</b>	
<b>Zip</b>	
<b>Contact Name</b>	
<b>Contact Email</b>	
<b>Contact Cell</b>	
<b>Contact Office Number</b>	
<b>Notes</b>	
<b>File</b>	
<b>Status</b>	Active

Application	Status
test demo 4	Approved
RPG Application	Full Application Submitted
test application	Application Received
Demo 2nd application for test	Full Application Submitted
Jeanette Rankin Women's Scholarship Fund	Full Application Submitted

Award	Status
test demo 4 award	Approved
RP Grant award	Approved
Demo grant for today award	Approved
demo grant 2 award	Underprogress
demo grant 2 award	Approved

Deliverable	Status
test demo 4 deliverable	Complete
RP Deliverable	Complete
demo grant 2 award deliverable	Active
demo deliverable 2	Complete
Small business grants award deliverable	Active

Invoice	Status
test invoice 4	Submitted
Saritha	Approved
demo grant 2	Paid
demo invoice	Submitted
Demo invoice	Approved

Action	Status
ampha cyclone	Active
Title	Active
Title	None
None	None
Title	Active

Approval	Status
ampha cyclone	Active
None	None
Title	Active
Title	Active

Comment	Status
Comment on Applications(RPG Application) by Admin WAB	Active
Comment on Applications(demo application 2) by Admin WAB	Active
Comment on Applications(demo application) by Test Admin	Active
Comment on Applications(For small business) by Admin WAB	Active
Comment on Applications(Clinical research center) by Admin WAB	Active

Change	Status
Title	Active

Report	Status
None	None
Report on Deliverables(58) by Test Applicant	None

Review	Status
	Complete
Review of test demo 4	Reviewed
	Complete
Review of RPG Application	Reviewed
Review for test application	Active

- ◆ The View organization page, besides providing details about the organization, also provides a summary of the following:
  - ❖ Grant applications filed by the organization,
  - ❖ Grants awarded
  - ❖ Deliverables
  - ❖ Invoices
  - ❖ Approvals
  - ❖ Comments
  - ❖ Reports
  - ❖ Reviews

## 21.13 Phone Logs

The **Phone Log** module allows a user to log a phone conversation regarding a grant application and associate it to that particular grant application. The screen shown below is displayed when a user clicks on the module from the super footer.

### Phone Logs

Create

Select All <input type="checkbox"/>	Application ↕	Call Number ↕	Call Type ↕	Status ↕	Actions
<input type="checkbox"/>	Relief fund for Ampha cyclone	None	None	active	
<input type="checkbox"/>	Questions Test	None	None	active	
<input type="checkbox"/>	Bhaghavathula charitable trust	None	None	active	
<input type="checkbox"/>	cricket for poor	None	auto	active	

First Previous 1 Next Last

10 ↕

Showing 1 to 4 of 4 entries

Delete
Print

Choose format
▼

Export

- ◆ Click on **Create** button (top right corner of the grid) to add a new phone log in the system.

### 21.13.1 Create/Edit Phone Log

Click on **Create** button (as mentioned above) to add a new phone log in the system or click on **Edit** icon for an existing phone log record to edit its details. The screen shown below is displayed when these actions are performed.

#### Phonelog - Create

<b>Application*</b> -----	<b>Call number</b> 000-000-0000	<b>Call type</b> --Select--
<b>Call reason</b> --Select--	<b>Call date</b> 06/19/2020	<b>Call duration</b> HH:MM:SS
<b>Caller</b> -----		
<b>Note</b>          		
<b>Submit</b> <b>Cancel</b>		

- ◆ Enter/select or edit details of the phone log record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new phone log record or to complete editing an existing phone log record.
- ◆ Click on **Cancel** button to cancel the process and return to previous screen.

### 21.13.2 View Phone Log

Click on **View** icon for a phone log record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular phone log record.

#### Phonelog - Questions Test

<b>Back</b>	<b>Application</b> Questions Test
<b>PDF</b>	<b>Note</b>
<b>Delete</b>	<b>Status</b> active
<b>Edit</b>	

- ◆ Click on **Back** button in the left menu to go back to the phone logs grid page.
- ◆ Click on **PDF** button in the left menu to open details of a phone log record in a PDF file from where a user can print the information.
- ◆ Click on **Delete** button in the left menu to delete a phone log record.
- ◆ Click on **Edit** button in the left menu to go to edit page of a phone log record.

## 21.14 Closeout Questions

The **Closeout Questions** module displays a list of questions, in a grid format, which are needed to be answered by appropriate GMS personnel to close out a grant. These questions for a grant act as a checkpoint before the grant is closed. The module allows a user to add/edit a closeout question for a grant under a program.

The screen shown below is displayed when a user clicks on this module from the super footer.

### Grant Close Outs

Create

Grant ↕	Question ↕	Status ↕	Actions
Accelerated College Credit Grant	Deliverables Submitted by Grantee	Active	
Accelerated College Credit Grant	Invoices Submitted by Grantee	Active	
Accelerated College Credit Grant	Payments Done for Invoices	Active	
Accelerated College Credit Grant	Performed Grant Audit	Active	
AS Grant	Close Grant	Active	
AS Grant	Is all deliverables completed?	Active	
AS Grant	Is all invoices are approved?	Active	
AS Grant	Is all payments are done?	Active	
AS Grant	Is milestones are completed	Active	
AS Grant	My Fund is 60,000 US Dollars	Active	

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4
Next
Last

10
↕

Showing 1 to 10 of 32 entries

- ◆ Click on **Create** button (top right corner of the grid) to add a new closeout question in the system for a grant.

### 21.14.1 Create/Edit Closeout Question

Click on **Create** button (as mentioned above) to add a new closeout question for a grant or click on **Edit** icon for an existing closeout question record to edit its details. The screen shown below is displayed when these actions are performed.

## Grant Close Out - Create

**Grant**  
---Select---

**Question\***

**Answer Type\***  
Text Field

**Status**  
active

**Required**

**Submit** **Back**

- ◆ Enter/select or edit details of the closeout question record in the fields provided.
- ◆ Click on **Submit** button to complete adding a new closeout question for a grant or to complete editing an existing closeout question record.
- ◆ Click on **Back** button to cancel the process and return to previous screen.

### 21.14.2 View Closeout Question

Click on **View** icon for a closeout question record to view its details. The screen shown below is displayed when a user clicks on view icon for a particular closeout question record.

## Grant Close Out

<b>Question</b>	Deliverables Submitted by Grantee
<b>Answer Type</b>	Yes or No Radio Buttons
<b>Status</b>	Active

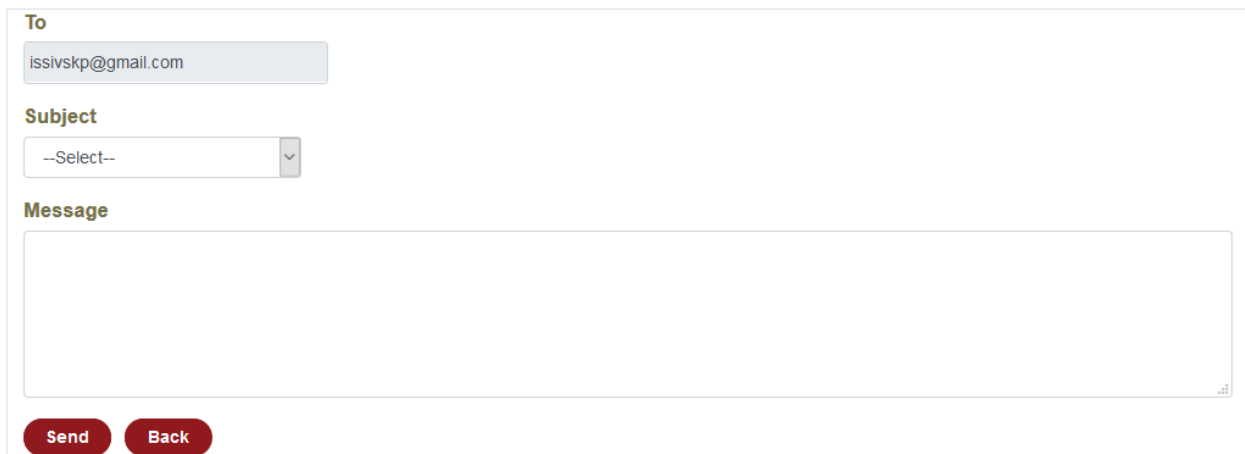
- ◆ Click on **Back** button in the left menu to go back to the closeout questions grid page.

## 21.15 Tech Support

The **Tech Support** module allows an applicant to reach out to DEQ Tech Support team with any question/concern/message related to a grant, grant application or other technical issues. The Tech Support page can be accessed by an applicant either by clicking the corresponding icon in the main header (as explained in **Section 8**) or by clicking the link to the page in the super footer area.

The page shown below is displayed when an applicant accesses this page.

### Tech Support



The screenshot shows a web form titled "Tech Support". It has three main sections: "To", "Subject", and "Message". The "To" field contains the email address "issivskp@gmail.com". The "Subject" field is a dropdown menu currently showing "--Select--". The "Message" field is a large, empty text area. At the bottom of the form, there are two buttons: "Send" and "Back".

- ◆ Select the **Subject** of the message, being sent to tech support team, from the drop-down.
- ◆ Enter the question/concern/message to be sent in the text area provided for **Message** field.
- ◆ Click on **Send** button to complete sending the message/question to the tech support team. Click on **Back** button to cancel the process and return to previous screen.

## 21.16 Assurances

The **Assurances** module allows DEQ personnel to set up terms of assurance which shall be used in a grant application. These assurances define the terms and conditions, and Federal assurances (if any) associated with a grant. The screen shown below is displayed when a user clicks on this module from the super footer.

### Assurances

Create

Body <span style="float: right;">↕</span>	Actions
<p>test</p> <p>The Board / Organization hereby applies for and, if awarded, accepts the federal program funds requested in this application. In consideration of the receipt of these grant funds, the Board agrees that the General Assurances form for all federal funds and the terms therein are specifically incorporated by reference in this application. The Board also certifies that all programs and pertinent administrative requirements will be met. These include the Education Department General Administrative Regulations (EDGAR), the Office of Management and Budget Accounting Circulars, and the Department of Education's General Education Provisions Act (GEPA) requirement. In addition, the Board certifies that the charter school is in compliance with the requirements of the federal Children's Internet Protection Act (CIPA) and that no policy of the local educational agency prevents or otherwise denies participation in constitutionally protected prayer in public schools.</p> <p>Charter schools/district partnership(s) that accept funding through the Oregon Charter School Grant Program agree to the following assurances:</p> <ol style="list-style-type: none"> <li>1. The authorized representative possesses the legal authority to apply for this grant, to execute the grant, to comply with certifications, budget, and fiscal requirements, and to act as the governing body's authorized representative for the grant program.</li> <li>2. No member of the charter school's governing body or its authorized representative has any conflict of interest with any party (employee, contractor, vendor, etc.) that has a financial interest in the grant award.</li> <li>3. Grant recipients are aware that U.S. Department of Education regulations prohibit a person from participating in an administrative decision regarding a project if (a) the decision is likely to benefit that person or his or her immediate family member, and (b) the person is a public official or has a family or business relationship with the sub-grantee, and have adopted by their governing body policies regarding apparent or actual conflicts of interest consistent with this federal regulation. Further, the recipients certify they will avoid apparent and actual conflicts of interest when administering grants and entering into contracts for equipment and services.</li> <li>4. The applicant will annually, for the life of the grant, provide the U.S. Secretary of Education and the Oregon Department of Education such information as may be required to determine if the charter school is making satisfactory progress toward achieving the funded activities. This includes participation in any federal or state-funded charter school evaluations or studies.</li> <li>5. The applicant will fully cooperate with the U.S. Secretary of Education and the Oregon Department of Education in evaluating the program being funded by the grant.</li> <li>6. The charter school is nonsectarian in its programs, admissions policies, and employment practices.</li> <li>7. The charter school complies with the Age Discrimination Act of 1975, Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, section 504 of the Rehabilitation Act of 1973, and Part B of the Individuals with Disabilities Education Act.</li> <li>8. The charter school agrees to comply with the same Federal and State audit requirements as do other public schools in the State and arrangements have been made to finance those mandatory audits.</li> <li>9. The charter school meets all applicable Federal, State, and local health and safety requirements.</li> <li>10. The charter school operates in accordance with the applicable State law.</li> <li>11. The charter school's admission process will adhere to federal nondiscrimination laws and will not discriminate against students or applicants regarding race, gender, national origin, color, disability, sexual preference, or age.</li> <li>12. The charter school will admit students through an equitable lottery if more students apply than can be accommodated.</li> <li>13. The charter school shall maintain accounting records and other evidence pertaining to costs incurred, with the provision that the records shall be kept available by the grantee during the grant period and thereafter for three full years from the date of final payment. ODE must be permitted to audit, review, and inspect the grantee's activities, books, documents, papers, and records relating to the expenditures of grant proceeds during the period of the grant and for three years following final payment.</li> <li>14. Any modifications and/or changes to the grant budget will meet the approval of the ODE Project Director.</li> <li>15. The awarded planning grant funds will be spent or encumbered by within one year of the award date unless the ODE Project Director allows an extension of no more than six (6) months.</li> <li>16. The charter school has applied for a charter from an authorizing district and provided the district with a copy of the grant application on or before the date of submission to ODE, as evidenced by the Authorizing District Superintendent's signature below.</li> <li>17. The grantee will operate as a charter school as defined by the Elementary and Secondary Education Act [P.L. 107-110, section 5210(1)] throughout the duration of this grant.</li> </ol> <p>It is the responsibility of each local charter school that receives funds under this grant to comply with all required federal assurances. Funded sites will be expected to cooperate with the Department in the development and submission of certain reports to meet certain state and federal guidelines and requirements. All grantees are required to provide requested data to ODE. Moreover, funded projects will be required to maintain appropriate fiscal and program records. Fiscal audits of funds under this program are to be conducted by the recipient agencies annually as a part of their regular audit. Auditors should be aware of the Federal audit requirements contained in the Single Audit Act of 1984.</p> <p>IF ANY FINDINGS OF MISUSE OF FUNDS ARE DISCOVERED, PROJECT FUNDS MUST BE RETURNED TO THE OREGON DEPARTMENT OF EDUCATION. The Oregon Department of Education may terminate a grant award upon thirty (30) days notice if it is deemed by the Oregon Department of Education that the applicant is not fulfilling the funded program as specified in the approved project application. Grant recipients will be required to keep and maintain all equipment purchased with grant funds in accordance with the requirements of federal law and regulation. Should the charter school close or be terminated by the sponsor, the charter school will work with the Oregon Department of Education regarding the distribution of assets purchased with this grant. The governing body of the charter school applicant has authorized the filing of this application and the undersigned representative has been duly authorized to file this application and act as the authorized representative of the applicant in connection with this application. I do hereby certify that all facts, figures, and representations made in this application are true and are correct and are consistent with the statement of certifications. Furthermore, all applicable statutes, regulations, and procedures for the program and fiscal control and records maintenance will be implemented to ensure proper accountability of funds distributed for this project. All records necessary to substantiate these items will be available for review by state and federal monitoring staff. All progress reports and the final report requested through this grant program will be filed on time. I further certify that all disbursements will be obligated after the grant has been awarded and the revised budget (if applicable) is approved and before the termination date; all disbursements have not been previously reported, and disbursements were not used for matching funds on this or any special project.</p>	<div style="text-align: center; margin-bottom: 10px;"> <span style="font-size: 20px;">👁</span> <span style="font-size: 20px;">✎</span> </div> <div style="text-align: center; margin-bottom: 10px;"> <span style="font-size: 20px;">👁</span> <span style="font-size: 20px;">✎</span> </div>

First Previous 1 Next Last

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Showing 1 to 2 of 2 entries



### 21.16.1 Create/Edit Assurances

Click on **Create** button to add a new record of terms of assurances for a grant, or click on **Edit** icon for an existing assurances record to edit its details. The screen shown below is displayed when these actions are performed.

## Assurance - Create

**Back**

**Body\***

**Submit**

- ◆ Enter the terms of assurance in the text area provided for **Body** field.
- ◆ Click on **Submit** button to complete adding or editing an assurance record.
- ◆ Click on **Back** button in the left menu to go back to assurances grid page.

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