E-Grants
Management System
MONTANA Office of Public Instruction

E-Grants User Guide

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Updated April 2009

Montana
Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

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Management System
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The OPI has the following grants currently available through E-Grants:

- **ESEA / NCLB Consolidated**
  - Title I A – Improving the Academic Achievement of the Disadvantaged (Basic)
  - Title I A – Schoolwide
  - Title II A – Improving Teacher Quality
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  - Title III – English Language Acquisition
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- **Title I School Improvement**
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- **IDEA Consolidated**
  - Individuals with Disabilities Education Act Part B (IDEA Part B)
  - Individuals with Disabilities Education Act Preschool (IDEA Preschool)
- **Title VI Part B 21st Century**
- **Carl Perkins**
- **Gifted and Talented Grants**

Common Elements to all programs in E-Grants:

- **Planning Tool**

    - The Planning Tool serves as the first step in developing an application for any program on E-Grants. This process establishes the relationship between the school district comprehensive education planning process, the fiscal resources provided by federal and state programs and measurable objectives that gauge the results of program activity. Every Legal Entity must complete the **Planning Tool** prior to starting E-Grants applications each year.

Steps to completing the Planning Tool:

1. *Log into* E-Grants.

2. **Menu List** page opens showing the available applications (grants) based on designated security roles.

3. *Click* **Planning Tool**.
    - Every Authorized Representative (AR) and/or district staff completing application pages should have the Planning Tool on the menu.
    - *Click* on the 'radio button' to select the prior year Planning Tool
    - *Click* 'Copy to New Year' to copy last year's goals into the new application. Or complete the Planning Tool for the new application year by *clicking* 'Add a new Plan'.
    - Information from the completed Planning Tool is pulled into various pages within the application.

Program Specific Notes on the Planning Tool:

ESEA/NCLB Consolidated – For districts that apply as a 'System' (Elementary and High school combined) or Consortium (several members); only the 'Prime Applicant' needs to complete the Planning Tool.

IDEA Consolidated – Every member of a Cooperative AND members of a 'System' in IDEA, need to complete the Planning Tool (Topic 5). For example, if the Elementary is the Prime Applicant for an Elementary and High school 'system' for the IDEA application, both the Elementary and High school need to complete the Planning Tool.

Carl Perkins – High school must complete the Planning Tool (Topic 7) even if the Planning Tool has been completed for another application under the Prime Applicant.

➢ Assurances, Common and Program

Note: Only the authorized representative (AR) will have the functions (i.e., check boxes and buttons) available to complete the Common and Program Assurance pages.

Steps for completing the assurances:

1. *Click* the **Assurances, Common and Program** tab.

2. Opens to **Common Assurances page** (sub tab strip)
   - The district is required to agree to common assurances for each funded program.
   - Review and agree to the Common Assurances by checking the box at the top of the page.
   - *Click* the 'Save Page' button at the bottom of the page. The date box will auto fill when saved.

3. **Program Specific Assurance pages** (sub tab strip).
   - *Click* the checkboxes on each program specific assurance page. The district is required to agree to specific assurances for each funded program.
   - *Save* each page.

4. **Assurances** (last tab on the sub tab strip).
   - *Click* 'Legal Entity Agrees' button as the final step in the Assurances requirements.

- **Contact Information** page
  - *Click* the **Contact Information** tab.
  - Fill in summer telephone numbers.
  - *Add* additional staff, up to five, to receive system generated approval/disapproval e-mails at the bottom of the page. The e-mails are only sent to the AR and anyone listed at the bottom of the **Contact Information** page.
  - *Add* Title Program contacts, if applicable.
  - *Save the page!!*

- **Funding/Allocations** Page

  - The **Allocation** page provides 'view only' access to project and multi-district Allocation information as well as enterable fields for transferring funds across multiple programs. It is an excellent source of information for consolidated planning.
  - The **Allocations** page is divided into seven sections:
    1. Current Year Allocation
    2. Prior Year Allocation (Prime Applicant carryover and reallocated funds)
    3. Multi-district
    4. Transferring or Flexing funds per the provisions of Title VI,
    5. Schoolwide transfers,
    6. Funds not applied for - a section to indicate funds a district choose not to apply for, and
    7. Total Available for Budgeting.
  - 'Mulit-District' section:
      - 'Transfers In' to the administrative agent/prime applicant of a multi-district agreement and 'Transfers Out' for participating member districts are shown here (includes current and carryover amounts for member districts).
      - The 'Administrative Agent' link lists the administrative agent/prime applicant and all participating members with their contributing Allocations. *Click* on this link to view.

Note: For the IDEA Consolidated and Carl Perkins application, the **Allocations** page is a 'view-only' page.

- 'Funds Available for Transfer/Flex' section **(ESEA/NCLB Consolidated** only**):**
    - This section is available for transferring or flexing funds per the provisions of the State and Local Transferability Act found in ESEA Title VI.
    - *Complete* this section to indicate to the Office of Public Instruction (OPI) that your district is transferring or flexing funds based on its eligibility.
    - The row 'Total Available for Transfer/Flex' displays the amount of funds available to be transferred/flexed out.
    - The system will only allow districts to transfer/flex funds that are eligible for transfer/flex.
- 'Funds Not Applied for' section:
    - If a district chooses not to apply for funds for some but not all programs, click the box for either current year/prior year or both under the title programs for which you are not applying.
- The 'Total Available for Budgeting' line will reflect all adjustments to project funds and will display the total funds available for each program budget and budget detail page.

Please refer to the 'Instruction' link on the Allocation page in E-Grants for more detailed information about the **Funding/Allocations** page.

- **Program Detail** Tab (pages)
  - Each E-Grants application has pages under the **Program Detail** tab that need to be completed.
  - *Click* the **Program Detail** tab
  - *Complete* each page (along the sub tab strip)
  - *Refer* to instructions on completing applications for specific programs.
  - *Contact* OPI Program Specialists with question about how to fill out **Program Detail** pages. Use the 'contact us' link at the bottom of all E-Grants web pages.

- **Budget Pages**
  - Each E-Grants application has **Budget Detail** pages that need to be completed.
  - *Click* the Budget Page tab.
  - *Complete* each page (along the sub tab strip)
  - *Refer* to instructions on completing applications for specific programs.
  - *Contact* OPI Program Specialists or OPI accountants with question about how to fill out **Budget Detail** pages. Use the 'contact us' link at the bottom of all E-Grants web pages.

- **Submit Page**
  - Each E-Grants application has a **Submit** page for the following functions:
    - 'Consistency Check' button is available on the Submit page. The Consistency check must be run to check for errors within the application.
    - Once a successful consistency check is run, a 'Submit' button is enabled. The AR will have the ability to submit to the OPI. A data entry staff person will submit for local review (to the AR). The AR must make final submission to OPI.

- Refer to "How to Complete the IDEA Application" instructions section of this document for IDEA submission instructions.

- 'Lock Application Button/Unlock Application' Button

  - The application can be 'locked' by data entry staff to prevent changes to the application. That person or the Authorized Representative has the ability to 'unlock' on the **Submit** page.
  - A successful consistency check will also 'lock' the application. If changes are necessary, the application will have to be 'unlocked' on the **Submit** page.

Completing Applications in E-Grants

How to Complete the ESEA/NCLB Consolidated Application in E-Grants:

1. *Log into* the E-Grant system.

2. **Menu List** page opens showing the available applications (grants) based on designated security roles.

3. *Click* **Planning Tool**.
    - Every Authorized Representative (AR) should have the Planning Tool on their menu.
    - *Click* on the 'radio button' to select the prior year Planning Tool and *click* 'Copy to New Year' to copy last year's goals into the new application. Or complete the Planning Tool for the new application year by clicking 'Add a new Plan'.
    - Information from the completed Planning Tool is pulled into various pages within the application.

4. *Return* to the **Menu List** page by using the link in the upper right corner of the page.

5. Select the **ESEA/NCLB Consolidated Application.**

Contact E-Grants Security Officer, at (406) 444-3448, if you do not have access to the planning tool or the appropriate programs.

Creating a new application. Here are the steps:

1. Click “Create Application” at the **Application Select** page.

Note: Pages need to be completed at both the consolidated “level” of the application and at the individual title program “level.” The application opens at the ESEA/NCLB Consolidated “level”.

2. *Click* the **Contact Information** Tab.
   - Fill in summer telephone numbers.
   - *Add* additional staff to receive system generated approval/disapproval e-mails at the bottom of the page. The e-mails are only sent to the AR and anyone listed at the bottom of the **Contact Information** page.
   - *Add* Title Program contacts, if applicable.
   - *Save* the page by clicking the Save Page button.

3. *Click* the **Funding** tab (opens **Allocations Page**)
   - Review allocations for each title program.
   - *Transfer* or *Flex* funds, if the district is eligible and chooses, in the middle section of the page.
   - If a district chooses not to apply for funds for some but not all programs, *click* the box for either current year/prior year or both under the title programs for which you are not applying.
   - *Save* the page by clicking the Save Page button.

NOTE: If district is School Wide eligible, the Title I Targeting Step 4 page must be completed prior to transferring funds into the School Wide program.

4. *Click* the **Topic Funding** tab to review topics or select topics for ESEA Title VIB, Subpart 2 (RLIS), if eligible for that program. (This page is dependent upon the completion of the Planning Tool).

5. *Click* the Save Page button on the **Topic Funding** page, even if there are no updates.

6. *Go to* the program "level" (i.e. Title IA, IIA, IID, etc.) of the application by using the 'Applications Sections' drop down list in the upper right corner of the page.

7. *Complete* the **Program Detail** (and all subtabs) pages for each title program with an allocation. Remember to *save* all pages by clicking the Save Page button.

For details on how to complete the program pages, refer to the 'Instruction' link on every page. If necessary, click the 'Contact Us' link at the bottom of the page for assistance.

8. *Complete* **Budget Detail** (tab under **Budget Pages**) page for each title program with an allocation.
   - The district needs to *budget* the 'Total Allocation Available for Budgeting' displayed at the top of the Budget Detail page (pre-filled from the Funding/Allocations Page at the ESEA/NCLB consolidated "level").
   - Enter the appropriate amount under each Purpose Category and Object Code until 'Allocation Remaining' (at the bottom of the **Budget Detail** page) equals $0.

   Note: The instruction link in the upper right corner of the **Budget Detail** page provides details about Object Codes and Purpose Categories.

   - The 'Maximum Indirect Cost' is automatically calculated (Line E) on the Budget Detail page for districts with an approved Indirect Cost rate. Districts can choose to budget the Maximum Indirect Cost or a lesser amount on Line G.
   - The 'Calculate Totals' button allows a running total of budgeted allocations.
   - *Save the Page!!*

9. *Complete* **Private/ Nonpublic Equitable Share** pages (available under the **Budget Detail** tab)
   - Must be *completed* and *saved* for every program with an 'Allocation Available for Budgeting'.
   - *Enter* enrollment for Participating Private/Nonpublic Schools. Enter 0 if there are no Participating Private/Nonpublic Schools in the district.
   - The last line displays 'Equitable Share' for participating private/nonpublic schools.
   - *Click* the Save Page button.

Remember "Instruction" link for completing pages!!

10. Once all program pages and budget pages have been completed for each title program with an allocation, go back to the **ESEA/NCLB Consolidated "level"** of the application from the drop down list in upper right corner.

- *Complete* the **Private/Nonpublic School Participation** page(s). Enter 0 if there are no Participating Private/Nonpublic Schools in the district.
- Click the Save Page button.

11. *Click* the **Assurances, Common and Program** Tab

- The Authorized Representative (AR**)** is required to sign off, or agree, to Common Assurances, Program Specific Assurances (every title program with an allocation available for budgeting), and the Assurance Summary (last tab under Assurances, Common and Program).
- The AR clicks the check box on each applicable **Assurance** page and saves the page(s).
- *Click* the Legal Entity Agrees button on the **Assurance Summary** Page. The date will auto-fill.

12. *Click* the **Submit** Tab

- *Run* the consistency check.
- Correct any errors that display.

13. When all edits have been passed by the Consistency Check, a message to the AR stating "Click 'Submit to OPI' button to make final submission of the application for OPI review and approval" will appear.

- AR *clicks* 'Submit to the OPI' button to *submit* the application.

Note: If district staff with the LEA data entry role are running the consistency check, the 'button' on the submit page will say 'Submit for Review'. The application is not submitted at this point. The AR must make final submission to OPI.

- Once the application has been submitted, the **Application Select** page will show status of "Submitted to SEA."
- The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

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How to Complete the IDEA Consolidated Application in E-Grants:

Member Applications

- Members of an IDEA Special Education Cooperative, and members of an IDEA 'System' (Elementary/High School) or consortium, must complete a simplified application for IDEA in E-Grants.

Steps to complete the member application:

1. *Log into* the E-Grant system.

2. **Menu List** page opens showing the available applications (grants) based on designated security roles.

3. *Select* the district (member).
   - Contact E-Grants Security Officer, at (406) 444-3448, if you do not have access to the planning tool, the appropriate programs on the **menu list**, or if you do not have the option to select the district.

4. *Click* **Planning Tool**.
   - The **Planning Tool** must be completed for both the member and the Administrative Agent (prime applicant).
   - *Click* on the 'radio button' to select the prior year Planning Tool and *click* 'Copy to New Year' to copy last year's goals into the new application. Or complete the Planning Tool for the new application year by clicking 'Add a new Plan'.
   - Information from the completed Planning Tool is pulled into various pages within the application.

5. *Return* to the **Menu List** page by using the link in the upper right corner of the page.

6. Select the **IDEA Consolidated Application.**

Creating a new 'member' application. Here are the steps:

1. Click "Create Application" at the **Application Select** page.

   Year: 2009 Create Application

2. *Click* the **Contact Information** Tab.
   - Fill in summer telephone numbers.
   - *Add* additional staff to receive system generated approval/disapproval e-mails at the bottom of the page. The e-mails are only sent to the AR and anyone listed at the bottom of the **Contact Information** page.
   - *Add* IDEA Program contacts, if applicable.
   - *Save* the page by clicking the Save Page button.

3. *Click* the **Funding** tab (opens **Allocations Page**)
   - Review allocations for each program.
   - The member allocation will be in RED on the 'Transfer Out' row. This means that it will be transferred into the Administrative Agent's (prime applicant) application for budgeting.

4. *Click* the **Topic Funding** tab to review topics for IDEA (This page is dependent upon the completion of the Planning Tool).

5. *Click* **Program Detail** tab.

6. *Click* Private/Nonpublic Schools page. Enter information about Private/Nonpublic schools in your district and *save* the page.

7. *Click* **Maintenance of Effort** (MOE) tab.
   - Previous year's state and local funds expenditures on Special Education are prefilled.
8. *Enter* the amount to be budgeted by your district for 2009-2010 of state and local funds in the box (MOE) for Special Education and *save* the page.

9. *Click* the **Assurances** Tab

- The Authorized Representative (AR**)** is required to sign off, or agree, to Common Assurances, IDEA Assurances, and the Assurance Summary.
- The AR clicks the check box on each applicable **Assurance** page and saves the page(s).
- *Click* the Legal Entity Agrees button on the **Assurance Summary** Page (far right tab under Assurances). The date will auto-fill.

10. *Select* **IDEA Part B**.

- Use the drop down list in the upper right corner.

11. *Click* **Program Detail** tab.

12. *Review* and complete all **Objective Tabs** (pages). The information is prefilled on the **Objective** pages. Follow instructions for selecting activities, only if necessary.

13. *Select* **IDEA Consolidated** (drop down list upper right corner).

14. *Click* the **Submit** tab.

15. Click 'Consistency Check'

16. *Click* '*Submit* to Admin Agent' button. This submits the 'member' application to the (Administrative Agent/Prime Applicant).

Steps to complete the Administrative Agent Application (Prime Applicant):

1. Click “Create Application” at the **Application Select** page.

   Year: 2009 [Create Application]

2. *Click* the **Funding/Allocations** page on the Administrative Agent's application.

3. *Click* the blue link in the middle of the page on the 'Administrative Agent' row.

4. When the page opens, the member's LE# are a link (the member application must be in 'Submitted to AA' status.

5. *Click* the link. Takes you into the 'member' application.

6. *Review* the application for accuracy.

7. *Click* the **Submit** tab.

8. *Click 'Approve* or *Reject'* button. If rejected, the application will go back to the member for update.

9. If approved by the Administrative Agent, 'Close Browser' (upper right hand corner).

Note: *All members must be approved, following these steps, before the Administrative Agent can submit.*

10. *Click* the **Contact Information** Tab.
    - Fill in summer telephone numbers.
    - *Add* additional staff to receive system generated approval/disapproval e-mails at the bottom of the page. The e-mails are only sent to the AR and anyone listed at the bottom of the **Contact Information** page.
    - *Add* IDEA Program contacts, if applicable.
    - *Save* the page by clicking the [Save Page] button.

11. *Click* the **Topic Funding** tab to review topics for IDEA (This page is dependent upon the completion of the Planning Tool).

12. *Click* **Program Detail** tab.

13. *Click* **Private/Nonpublic Schools** page. Enter Administrative Agent's Private/Nonpublic schools information. 'Member' data is displayed (pulled in from 'Member' application). *Save* the page.

14. *Click* **Maintenance of Effort** (MOE) tab.
  - o 2006-2007 state and local funds expenditures FROM ALL MEMBERS are prefilled.

15. *Enter* the amount to be budgeted for 2008-2009 of state and local funds in the box (MOE) for Special Education Cooperative or Administrative Agent and *save* the page.

16. *Click* the **Assurances** Tab
  - o The <u>Authorized Representative (AR</u>**)** is required to sign off, or agree, to Common Assurances, IDEA Assurances, and the Assurance Summary (last tab under Assurances, Common and Program).
  - o The AR clicks the check box on each applicable **Assurance** page and saves the page(s).
  - o *Click* the [Legal Entity Agrees] button on the **Assurance Summary** Page (far right tab under Assurances, Common and Program. The date will auto-fill.

For details on how to complete the program pages, refer to the 'Instruction' link on every page. If necessary, click the 'Contact Us' link at the bottom of the page for assistance with program specific questions.

17. *Select* **IDEA Part B**.
  - o Use the drop down list in the upper right corner.

18. *Click* **Program Detail** tab.

19. Complete only the **Early Intervening Services** page. Follow instructions (blue link in upper right corner) for completing this page.

20. *Click* **Budget Pages** tab.

21. *Complete* **Budget Detail** (tab under **Budget Pages**) page on the **IDEA Part B** section.
    - The district needs to *budget* the 'Total Allocation Available for Budgeting' (includes 'Members' Part B allocations) displayed at the top of the Budget Detail page (pre-filled from the Part B section of the Funding/Allocations Page.).
    - Enter the appropriate amount under each Purpose Category and Object Code until 'Allocation Remaining' (at the bottom of the **Budget Detail** page) equals $0.

22. *Select* **IDEA Preschool** (Use the drop down list in the upper right corner).

23. *Complete* **Budget Detail** (tab under **Budget Pages**) page on the **IDEA Preschool** section.
    - The district needs to *budget* the 'Total Allocation Available for Budgeting' (includes 'Members' Preschool allocations) displayed at the top of the Budget Detail page (pre-filled from the Preschool section of the Funding/Allocations Page.).
    - Enter the appropriate amount under each Purpose Category and Object Code until 'Allocation Remaining' (at the bottom of the **Budget Detail** page) equals $0.

    Note: The instruction link in the upper right corner of the **Budget Detail** page provides details about Object Codes and Purpose Categories.

24. *Select* **IDEA Consolidated** (Use the drop down list in the upper right corner).

25. *Click* **Submit** tab on the Administrative Agent's application.
    - *Run* the consistency check.
    - Correct any errors that display by going back to the application.

26. When all edits have been passed by the 'Consistency Check', a message to the AR stating "Click 'Submit to OPI' button to make final submission of the application for OPI review and approval" will appear.
    - AR *clicks* 'Submit to the OPI' button to *submit* the application.

Note: If district staff with the LEA data entry role are running the consistency check, the 'button' on the submit page will say 'Submit for review'. The application is not submitted at this point. The AR must make final submission to OPI.

- Once the application has been submitted, the **Application Select** page will show status of "Submitted to SEA."
- The AR and all individuals listed on the bottom of the **Contact Information** page will receive an e-mail notification stating that the application has been submitted for review.

Completing the Carl Perkins E-Grant Application:

Topic 7 must be completed in the <u>Planning Tool</u> before doing any budget work in the Carl Perkins application.

Note to Systems: If your system completed the planning tool for another E-Grants application (i.e., ESEA/NCLB) as the elementary district, a new planning tool will need to be created and completed for the high school district.

1. Log into E-Grants and *click* on **Carl Perkins - Secondary** from the **Menu List**.

2. To create a current year application:
   a. *Select* the year in the drop-down list. (ex: for the 2008-2009 school year, *select* 2009).
   b. *Click* on 'Create Application.'

3. To access an application:
   c. *Click* the radio button next to the appropriate application.
   d. *Select* 'Open Application.'

4. *Navigate* through the application by clicking on tabs from left-to-right. **Important:** *Click* 'Save Page' before selecting another tab.

   Note: When clicking a tab creates a new tab strip, navigate the new strip from left-to-right before proceeding through the original tab strip.

5. If you need assistance completing any page, *click* the 'Instructions' hyperlink on the right side of the page directly below the tab strip(s). If you still need assistance, *click* the 'Contact Us' hyperlink at the bottom of every page for Carl Perkins support staff contact information.

Object Codes

100 Personal Service Salaries – Salaries, Stipends

200 Employee Benefits – Benefits

300 Purchased Professional and Technical Services – Contracted services for administrative, professional, educational, technical, and cooperative services

400 Purchased Property Services – Utilities, building usage charges, repairs and maintenance services, rent, minor construction

500 Other Purchased Services – Student travel, employee travel, registrations, communications, printing, instructional field trips, travel for staff professional development

600 Supplies – Instructional supplies and materials, textbooks, library materials software, minor equipment

700 Property – Capital outlay, including major construction and equipment usually >5000 (Requires Pre-Approval by the Office of Public Instruction (OPI))

800 Other Objects – Rare-Dues, fees, student organization costs, memberships for professional organizations

900 Transfers – Transfers to other districts or cooperatives under a consortium or cooperative. Used only for IDEA B and Preschool. NCLB/ESEA Transfers and REAP-flex are handled on the Allocations page.

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How to modify E-Grants Applications/Amendments if "Returned for Changes":

Pop-up Blockers: It is critical that blockers be turned off to have the program operate properly. Use the link below for instructions on how to disable pop-up blockers, if the **Review Summary/Checklist** does not open.

http://www.hotcomm.com/FAQ/FAQ_popups.asp

OPI Review Process:
Once a district submits an E-Grants application to the OPI, the application is reviewed for compliance. If the application does not meet the specific requirements for each program, the OPI will return the application electronically to the district. This gives the district the opportunity to modify the application for final approval by OPI.

Rejected Application/Amendment Instructions:

1. Log into E-Grants and *click* on the appropriate program from the **Menu List** (e.g. ESEA/NCLB Consolidated).

2. C*lick* the radio button to select the application/amendment with a status of "Returned for Changes" on the **Application Select** page.

3. *Click* 'Review Summary**'** button on the **Application Select** page.
    - A table opens which shows the sections that have been accepted or rejected by OPI staff.

4. *Click* the radio button next to the section that has a status of "rejected" on the **Review Summary** page.

5. *Click* **'**Review Checklist'.
    - This web page will display OPI comments from the review of each program within the application. These comments may be used as a guide for districts when modifying the application for final approval. *Print* this for reference.

6. *Click Close Browser* to close the 'Review Checklist' and return to the application (link in upper right corner).

7. *Click* the **Page Lock Control** tab.
   - The **Page Review Status** page opens.

8. *Select* the 'Expand All' checkbox to display all pages.
   - If the web pages needing update are 'locked' in the **Page Status** column, *click* the 'Open Page for Editing' checkbox next to that page.

9. SAVE THE PAGE!!!

NOTE: If the application pages are 'open for editing' on the **Page Review Status** page, but the pages appear to still be 'locked', go to the **Submit Page** and *click* 'Unlock Application'.

10. Make changes as required (with guidance from the comments on the **Review Checklist**) to the appropriate application web pages. *Save* each page that is modified.

11. *Run* the 'Consistency Check'.

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12. Resolve any errors that result from the ‘Consistency Check’.

13. The Authorized Representative can *click* 'Submit To OPI' to submit the modified application for review and approval by OPI.

How to Print E-Grants Applications:

1. *Log into* E-Grants.

2. *Click* on the appropriate grant from the **Menu List** page.

3. This takes you to the **Application Select** page. *Select* the application or amendment for printing by *clicking* the radio button under the year.

4. This enables the 'PrintAll' button. *Click* 'PrintAll'. A message will display to the right of the 'PrintAll' button that states: "Print all request pending by (name) (date) (time)."

5. An e-mail is automatically generated stating that the request for print has been received. The printout is not sent via e-mail.

6. The 74+ page application will be available the **NEXT DAY** on the E-Grants system.

7. **NEXT DAY**: Follow steps 1, 2 and 3 to select the application.

8. The name of the person requesting the printout will be displayed as a blue, selectable link.

9. *Click* the blue link. The requested application will display as a PDF document.

10. Use your browser 'Print' button to *print* the application.

NOTE: You must have Adobe 7.0 to view the application. Districts can download the latest version of Adobe Reader. The following link is available on every OPI webpage.
http://www.adobe.com/products/acrobat/readstep2.html

How to Print the Grant Award Notice (GAN) in E-Grants:

1. *Log into* E-Grants.

2. *Click* on the appropriate grant from the **Menu List** page.

3. This takes you to the **Application Select** page. *Select* the most recent application or amendment with a status of 'Final Approved' by *clicking* the radio button under the year.

4. A blue 'GAN' link will display to the right of the 'Final Approved' status on the **Application Select** page. *Click* the link to view the GAN.

5. Follow the 4 step instructions on the **Grant Notification Award** page to 'view' the GAN using PDF.
   a. The GAN documents include the following information for the Prime Applicant:
      - Program Name
      - Federal Award Number
      - Statutory Authority for the Program
      - Revenue and Expenditure Accounting Codes
      - Project Number
      - Terms and Conditions of Award
      - Project Period
      - Reporting Due Dates
      - Award Amounts (original and amended amounts)
      - Approval Dates
      - OPI Contact Information

NOTE: You must have Adobe 7.0 to view the application. Districts can download the latest version of Adobe Reader. The following link is available on every OPI webpage.
http://www.adobe.com/products/acrobat/readstep2.html

Application Amendments in E-Grants:

When districts need to make modifications to a "Final Approved" application in E-Grants, it is necessary to create an amendment. Here are the common changes that require an amendment to an E-Grants application:

- Budgeting carryover funds added to the district's budget.
- Transferring the allocation of funds between eligible programs.
- Re-budgeting object of expenditure or purpose category codes on the budget detail page of an approved application.
- Budgeting reallocated funds added to the district's budget.
- Program objective or activity changes.

Important Information about Carryover: The most common reason for an E-Grants amendment is to budget for carryover. ONCE A PRIOR YEAR FINAL EXPENDITURE REPORT FOR A PARTICULAR PROGRAM HAS BEEN APPROVED, E-Grants automatically brings eligible unexpended funds forward to the districts current year budget, as carryover. An automatic e-mail notice is sent upon approval of the final expenditure report. This is the district's notice that there may be carryover funds to budget for in the current year. If the prior year final expenditure report is approved *after* the creation of the current year application, an E-Grants amendment to the current year budget is necessary.

Note for Consolidated Applications (ESEA/NCLB and IDEA): The prime applicant district is responsible for submitting the amendment; member districts do not take any action.

Steps to creating an amendment in E-Grants:

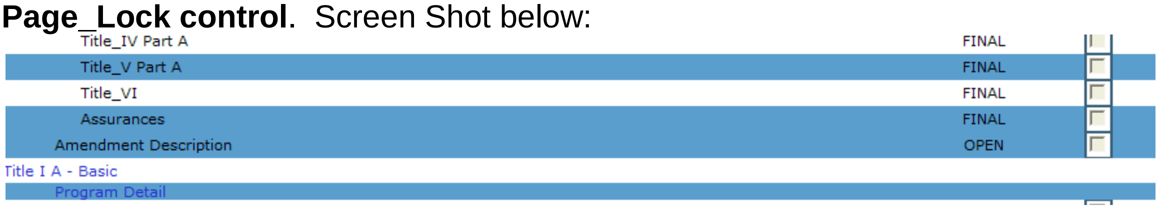
1. *Log into* E-Grants.
2. *Click* on the appropriate grant from the **Menu List**.
3. This takes you to the **Application Select** page. *Click* the radio button of the latest approved application or approved amendment.
4. *Click* the 'Create Amendment' button.

5. *Select* **Page_Lock Control** (last tab on the page).

6. This takes you to the **Page Review Status** page*. Click the* 'Expand All' checkbox.

7. 'Open Page for Editing' (unlocks) the web pages that need modification (i.e. Budget Detail, Program Detail, Private/Nonpublic Equitable Share, Targeting Step 4,etc.). C*lick* the check box to the right of the page needing modification and *save* the page.

Note: The Amendment Description page must be 'unlocked' on the **Page_Lock control**. Screen Shot below:



8. The 'Page Status' is now 'Open' for all pages that were checked for editing.

9. By using the dropdown menu titled **Application Sections** in the upper right corner of the page, *click* on the appropriate program for modification (Title IA, IIA, IID, IVA, VA, VIB, or IDEAB or Preschool).

10. *Click* on the tab (page) to be modified (i.e. Budget Detail, Program Detail, Private/Nonpublic Equitable Share, etc).

Note: If the modification increases or decreases an allocation for a program, the district will need to *re-save* the **Private/Nonpublic Equitable Share** page under the selected program's **Budget Pages** tab.

11. Make the necessary changes and *SAVE THE PAGE*!!

12. *Click* the **Amendment Description** tab

13. *Click* the check box of the application section(s) where the district made changes on the amendment. *Enter* a short description of what was changed.

14. *Save* the page!!

15. *Click* the 'Submit' tab (for ESEA/NCLB and IDEA applications, the 'Submit' tab is on the consolidated level of the application).

Note: The Authorized Representative has the only User ID and Password that can 'Submit' the amendment on behalf of the district(s).

16. *Click* 'Consistency Check'.

17. If no errors, go to step 19.

18. If the 'Consistency Check' results in errors, they must be corrected by returning to the program where the error originated.
- o Repeat steps 5-8 to unlock pages.
- o Return to the **Submit** tab to re-run the 'Consistency Check.'
- o Repeat until the Consistency Check returns no errors.

19. *Click* on the 'Submit to OPI' button.

Note: If district staff with the LEA data entry role is running the consistency check, the button will say 'Submit for Review'. The amendment is not submitted at this point. The AR must make final submission to OPI.

➢ **Additional Information:**

1. **Funding/Allocations tab (page).** The Carryover amount will be in the 'Carryover' row under 'Prior Year Funds'. 'System' applicants must check the 'Multi-District Transfer In' row for any Carryover increase that may have been added to the original amount from members.

   - o REAP-flex (100% transferability) districts may also transfer up to 100% of the carryover funds into receiving programs.

- o Districts with schoolwide programs that transferred funds to the schoolwide budget in the original application, must first go into Title IA Basic, **Targeting Step 4** page and redistribute the allocation. *Click* each blue button on the **Targeting Step 4** page in the order in which they appear to accurately redistribute funds. *Return* to the **Funding/Allocations** page. *Enter* the amount to transfer into the schoolwide row.

2. **Budget Detail** tab (page)

   - The 'Allocation Remaining' figure at the bottom of the **Budget Detail** page will display the carryover or reallocated funds to be budgeted for that program. *Distribute* funds under the appropriate object codes and purpose categories.

   - As a result of a carryover addition, districts have the option to budget up to the 'Maximum Indirect Cost' (Line E). If you choose this option, *enter* the Indirect Cost amount in Line G.

Montana Office of Public Instruction
Denise Juneau, State Superintendent
opi.mt.gov

E-Grants Management System MONTANA Office of Public Instruction

E-Grants Payment System

This document provides step-by-step instructions to assist District Clerks/Business Managers complete and submit Cash Requests and a Final Expenditure Report (Fiscal Closeout) for applications in E-Grants.

Creating a Cash Request or Expenditure Report in E-Grants:

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1. *Log* into E-Grants.

2. **Menu List** page - *Select* the appropriate grant from the list.

3. **Application Select** page - *Click* the radio button of the latest approved application or approved amendment.

4. *Click* the 'Payments' button.

5. **Payment Summary** page - This page displays the most current Grant Allocation by program; completed (paid by the OPI) payments; and balance remaining. *Click* on the blue hyperlink (dollar amount paid) under the **Completed Payments** row to view a history of payments made by program.

6. *Click* the 'View Cash Requests/Expenditure Reports' button.

7. **Cash Request/Expenditure Report Menu** page - By using the dropdown menu titled **Program**, *select* the appropriate program to create or open either a cash request or expenditure report (Title IA, IIA, IID, IVA, VA, VIB, or IDEAB or IDEA Preschool).

Creating a Cash Request

1. To create a new cash request, *click* the 'Create New Request' button.

2. You are at the **Cash Request** page.

3. To view a description of Object of Expenditure Codes, *click* on the blue hyperlink 'Description of Object Codes'.

4. By using the dropdown menu titled **Object Code**, *select* the object code for which cash is being requested. Object codes used to request cash should be those codes budgeted on the budget detail page of each program application.

5. Under **Expenditure Description and Itemization**, enter a brief description of the cost you are claiming cash to cover. For example, a description for object code 600 – Supplies might be, "text books for reading program", or educational materials for professional development training for math teachers."

6. Under the **Cash Request** column *enter* the amount of the request for the selected object code. Use whole dollars only and omit decimal places.

7. *Click* the 'Calculate Totals' button. The Final Approved Budget by object code will display.

- You may request up to 50% more than the amount budgeted for an object code. To request more than 50% over the amount budgeted for an object code, you'll need to create and submit an amendment to the program budget to the OPI. (If you try to request over 50% of a budgeted amount a "red warning" will appear at top of page.)

8. To create additional lines, *click* 'Create Additional Entries' button.

9. **Indirect Cost**: When an amount is entered for objects other than 700 Property and Equipment, or 900 Transfers, the corresponding indirect cost draw will be calculated and added to the total cash request. The district must have an approved and budgeted indirect cost rate for this to occur.

10. *Enter* the **End Period Expense (MM/DD/YYYY)** date.

- For an advance, enter the last day of the next month. Payments requested by the 25th of one month are made on the 10th of the following month. Request only enough cash to cover costs through the date of the next month's payment, in order to comply with federal cash management regulations.

11. To delete a cash request for an object code, *click* the 'Delete Row' box to the right of the line and *click* the 'Save Page' button. It will be deleted when the page is saved.

12. Under **Recap** at the bottom of the page:
- Grant Award (Allocation) -– Displays currently approved budget, including any approved amendments to the budget.
- Approved Budget – Displays currently approved budget, including any approved amendments to the budget.
- Amount Paid to Date – Displays payments that have been made by OPI
- Expenses to Date – Since only one expenditure report is required to be submitted at the end of the grant period to close the project, this will normally display $0.
- Balance Due LEA— NOT USED
- Funds on Hand – NOT USED

13. *Click* the 'Save Page' button. Correct any errors displayed and resave.

14. *Click* the 'Submit' button. The cash request is submitted to the OPI for approval and an e-mail message is automatically sent to the OPI program accountant.
- The 'Submit' button is only available to users with 'submit' authority (i.e., Authorized Representative or LEA Business Manager set up with security rights).

Creating an Expenditure Report

Users can create an expenditure report, open an existing expenditure report, or withdraw an existing expenditure report. The expenditure report can be created at any time after final approval of an application but submitted once, which is at the end of the grant period to close out the project.

1. To create a new expenditure report, *click* the 'Create Expense Rep' button on the **Cash Request/Expenditure Report Menu** page.

2. **Periodic Expense Report** page - Once you have opened this page, you will see the **Final Approved Budget by Object Code**.

3. *Enter* **Accumulated Expenditures to Date** for each Object Code line. Enter whole dollars only.
    - If you spent more than 50% over the amount budgeted for an object code, you'll need to submit an amended budget for OPI approval. Amendments are due no later than June 15th for projects that end June 30th, and September 15th for projects that end September 30th.

4. After entering expenditure amounts for all object code lines, *click* the 'Calculate Totals' button. The total of all lines and the amount of indirect cost recovery will display.
    - Expenditures (including indirect cost recoveries) should not exceed the total award amount.
    - Indirect costs are not calculated on expenditures for Object Codes 700 Property and Equipment, or 900 Transfers.

5. *Select* the **Expenditure Period End Date** from the drop down list.
    - There is currently only one date to select from the list since only one expenditure report is required (to close out the project).

6. Under **Recap** at the bottom of the page:
    - Grant Award (Allocation) – Displays current allocation
    - Approved Budget – Displays most recent approved budget (approved amendments)
    - Amount Paid to Date – Displays payments that have been made by the OPI.
    - Expenses to Date – Displays the total of expenditures reported on this report and any previous reports

- Balance Due LEA – Payments owed based on payments to date and reported expenditures, including this report
- Funds on Hand – Calculated cash on hand based on amounts paid to date and reported expenditures, including this report.

7. *Check* the box for 'Final Expenditure' at the bottom of the page. *Click* the 'Save Page' button.

8. *Click* the 'Submit to the OPI' button. The expenditure report is submitted to the OPI and an automatic e-mail is sent to the program accountant.

Tips and Tricks

1. Do not create a cash request and expenditure report at the same time. If you need to request cash as a final payment:

a. Submit either a cash request first and wait for payment then submit the final expenditure report or;

b. Submit a final expenditure report with a balance due to you the district. OPI will then pay on the final expenditure report.

2. If you 'Create an Expense' report right away without submitting to the OPI, you can open the expense report at anytime during the project year to view the most recent approved budget by object code. This is a good way to see a summary of how the program has been budgeted during the year as you create cash requests.

Returned for Changes

Once a cash request or expenditure report has been submitted by the LEA to the OPI, it is reviewed by an OPI program accountant. If a request is returned to the district clerk for changes, an automatic e-mail is sent notify the district clerk that a request has been returned. To review the status of the review and comments by the OPI you'll need to take the following steps:

1. *Log* into E-Grants.

2. **Menu List** page - Select the appropriate grant from the list.

3. **Application Select** page - *Click* the radio button of the latest approved application or approved amendment.

4. *Click* the 'Payments' button.

5. **Payment Summary** page - *Click* the 'View Cash Requests/Expenditure Report' button.

6. **Cash Request/Expenditure Report Menu** page - By using the dropdown menu titled **Program**, *select* the appropriate program to open either the cash request or expenditure report (i.e., Title IA, IIA, IID, IVA, VA, VIB, or IDEAB or IDEA Preschool) that was returned for changes by the OPI program accountant.

7. *Click* the 'Review Summary' button

8. **Review Summary** page – *click* radio button of the latest round was returned for changes. Then *click* the 'Review Checklist' button.
    - This will bring up a browser window that will explain in the comments box why the request or report was returned for changes and what you need to do to correct the document and resubmit.

    - You can print this window by selecting the Printer-Friendly link on the upper right hand side of the window. Once it has printed, click on the Close Browser link on the upper right hand side of the window.

9. *Click* on the **Click to return to CashReqst/Expend Menu** link located on the upper right hand side of the cash request or expenditure report page.

10. **Cash Request/Expenditure Report Menu** page – *Click* the radio button next to the request/report that shows a status of 'returned for changes'. Then *click* on the 'Open Request' button. Make the required adjustments and resubmit by clicking on the 'Submit Button'.