STANDARD AGREEMENTS EGrAMS GRANTEE TRAINING

Presentation by:

Michigan Department of Health & Human Services

Bureau of Grants and Purchasing

Grants Section

Revised 10/17/2019

Quick Links

Click on the link to go to that section

Getting Started

Reporting Information

Application/Amendment Process

Contact EGrAMS System Administrator at MDHHS-EGRAMS-HELP@michigan.gov or 517-335-3359

Important Information

- Validating your workstation is necessary to ensure that your computer is compatible with the EGrAMS system.

- This system is only compatible with **Microsoft Internet Explorer** 5.5 and above.

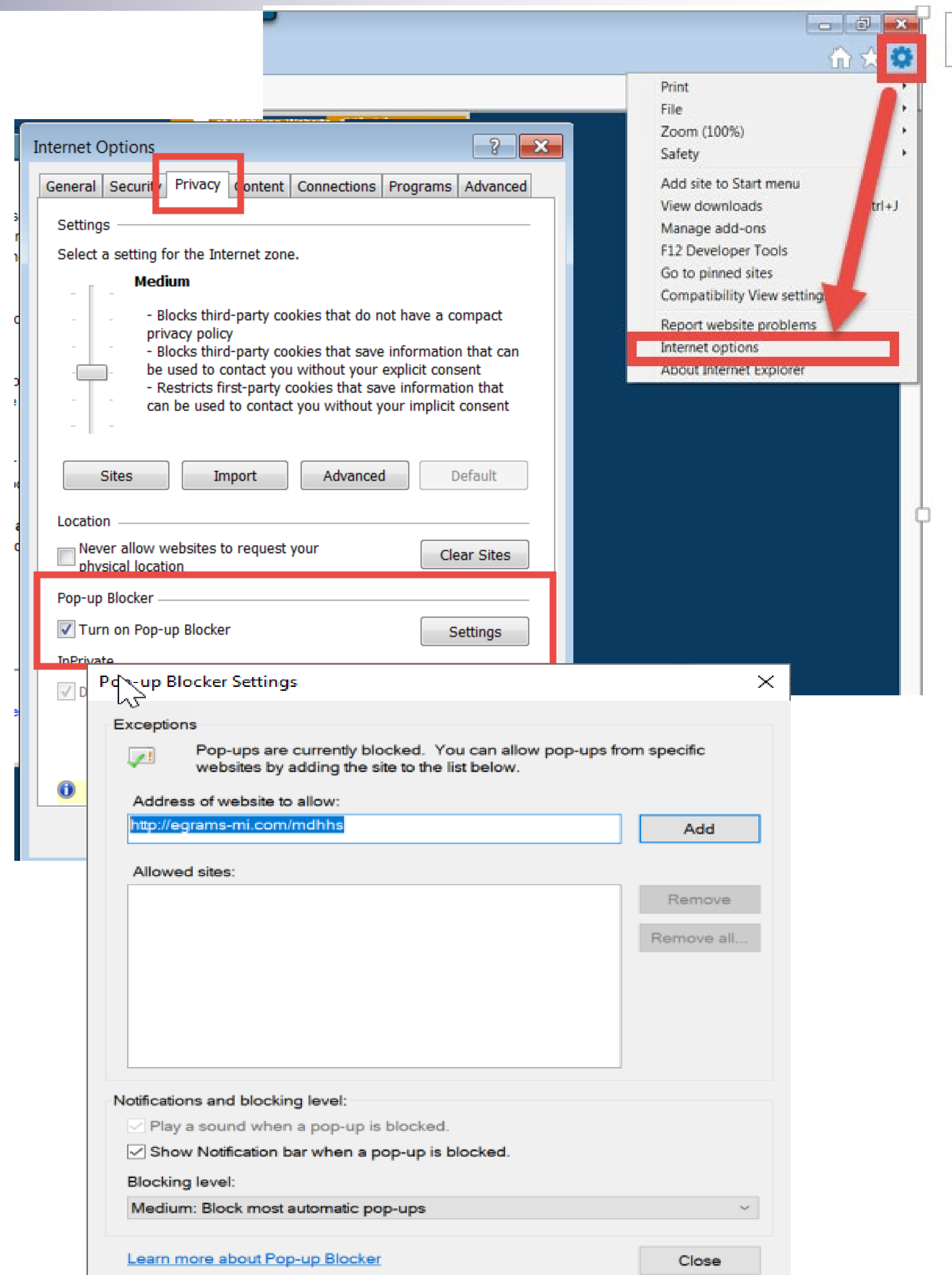
- *NOTE:* Other web browsers (such as: Google Chrome, Firefox, Safari, etc.) are *not* supported and will not allow the user to complete tasks properly in EGrAMS)

Do NOT contact HTC or the DTMB Helpdesk with EGrAMS issues. Contact EGrAMS System Administrator:
at MDHHS-EGRAMS-HELP@michigan.gov or 517-335-3359

Enabling Pop-ups

Pop-ups must be allowed for EGrAMS to operate correctly.

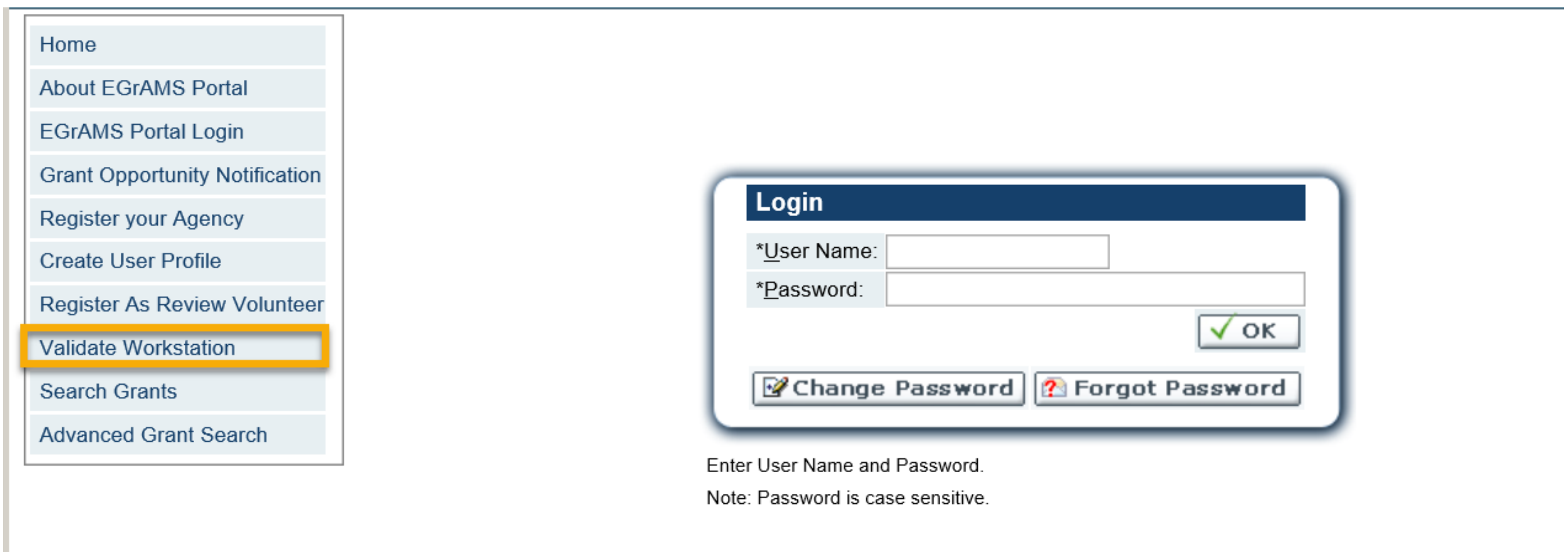
1. Click on the settings tool in Internet Explorer
2. Select ‘Internet options’
3. On the screen that comes up, select the ‘Privacy tab’.
4. On the same screen click on the ‘Settings’ button
5. Enter https://egrams-mi.com in the address box
6. Click ‘Add’
7. Click ‘Close’
8. On the final screen click ‘Ok’



Steps to Validate Workstation

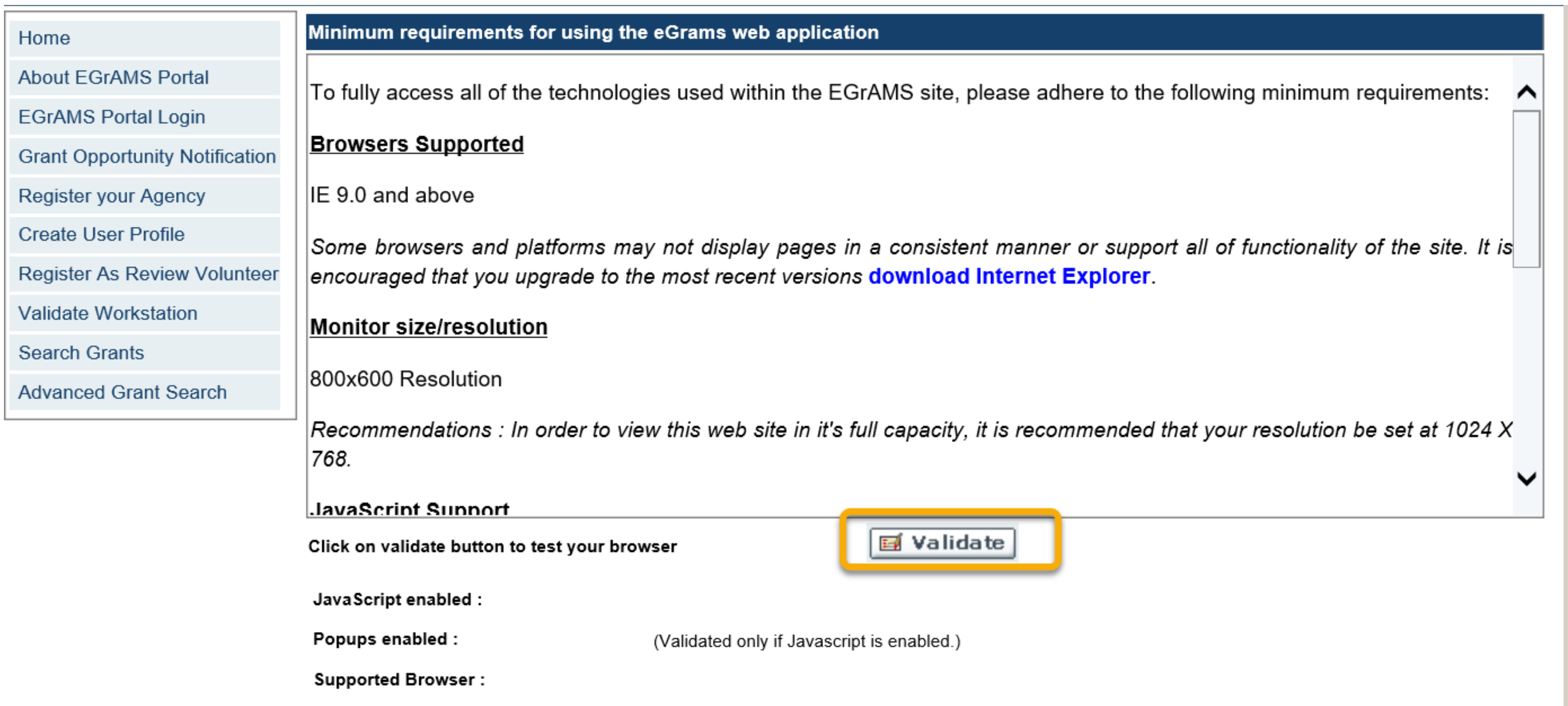
1. Enter https://egrams-mi.com/portal in your internet explorer browser

2. Select '**Validate Workstation'** from the 'Navigation Menu' option.



Validate Workstation

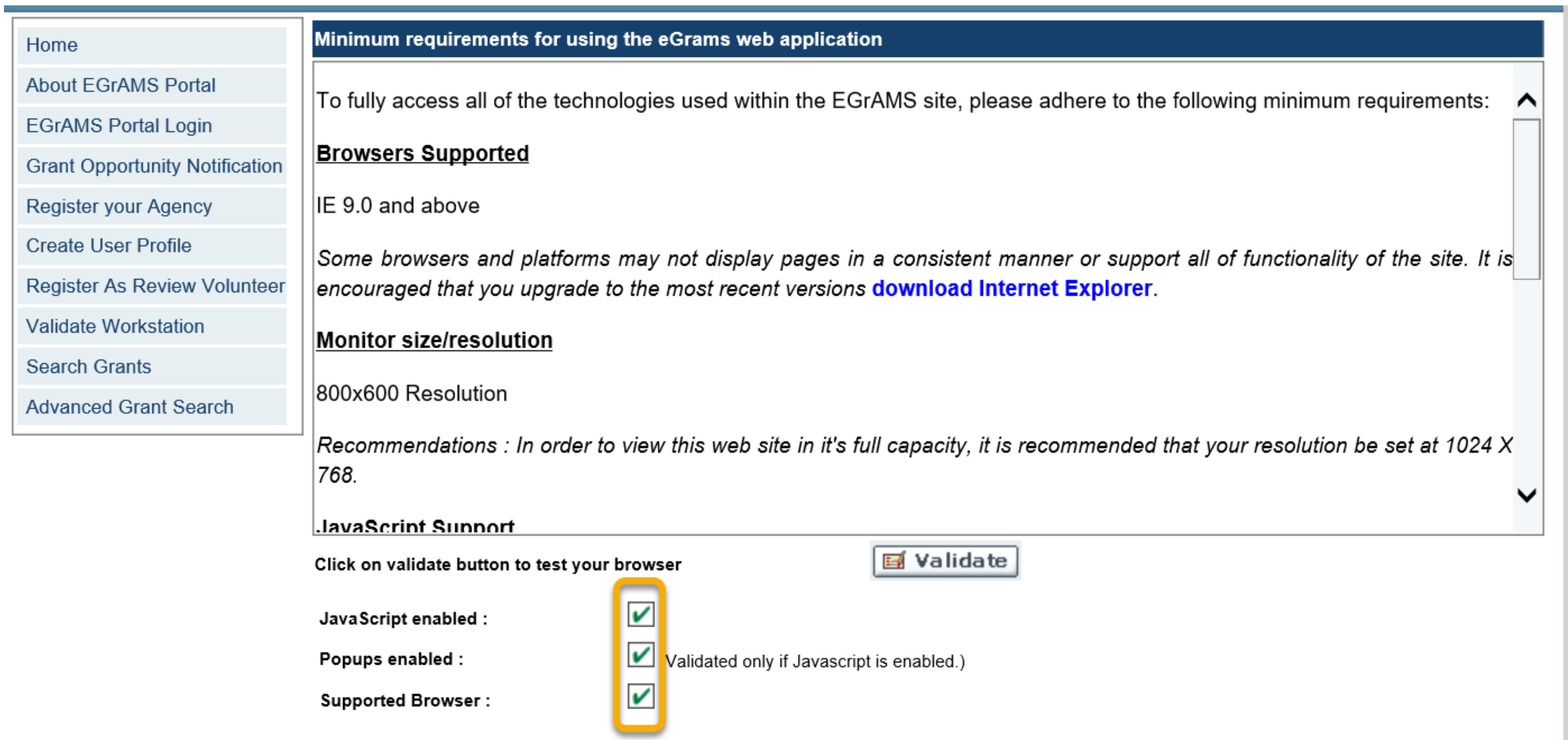
3. Click on the ‘Validate’ button



Once the Validate button has been clicked, the system should display the validation results.

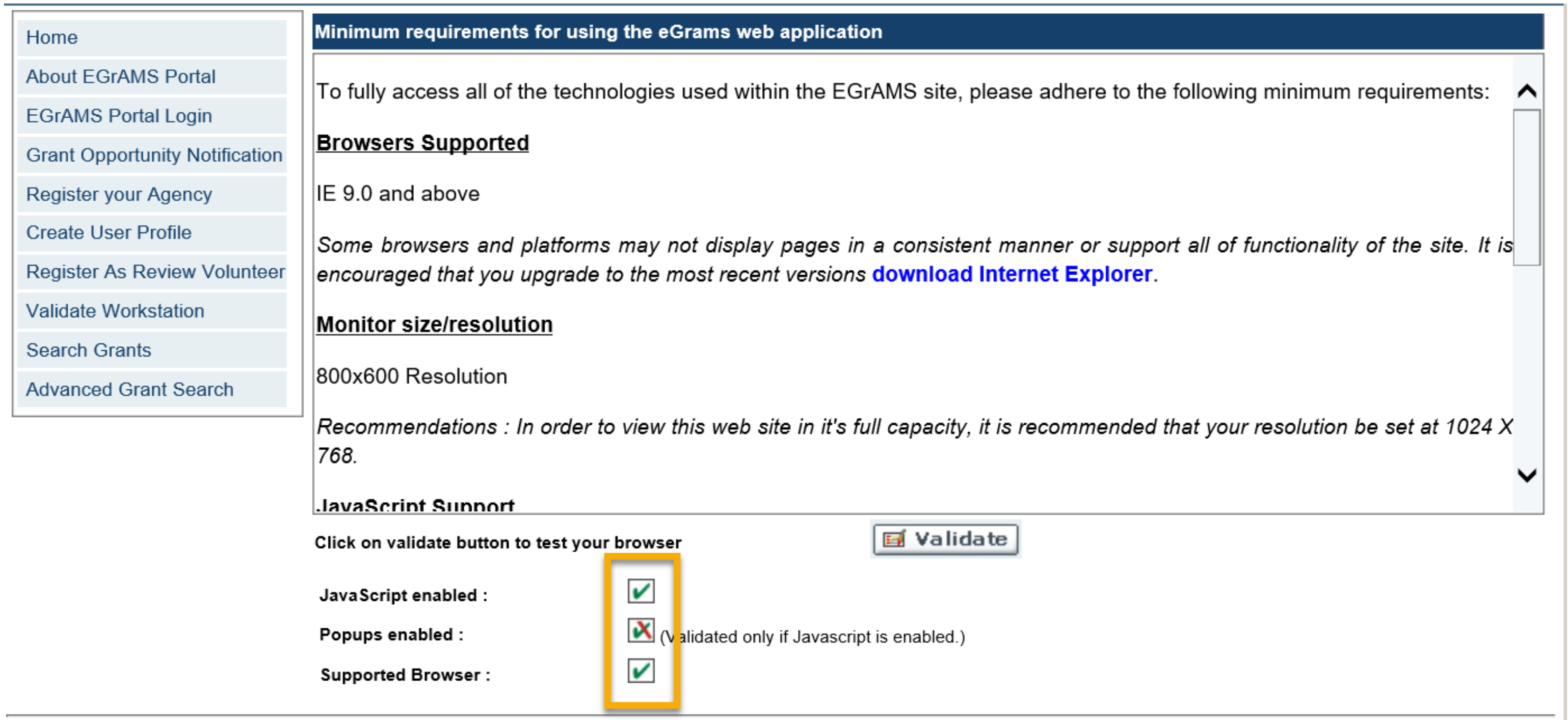
Validate Workstation

If all the check marks are green, your computer meets the minimum requirements to use EGrAMS.



Validate Workstation

If there is a red mark, your computer failed to meet the minimum requirements to use EGrAMS.



- If pop ups are being blocked, go to Internet Explorer settings and enable pop-ups (See page 4).
- Once all the errors have been corrected, please validate workstation again.

Compatibility View

To enable Compatibility View for specific a Web site that is not displaying correctly these steps:

1. Click the ‘**Tools’** menu and highlight ‘**Compatibility View Settings**’.

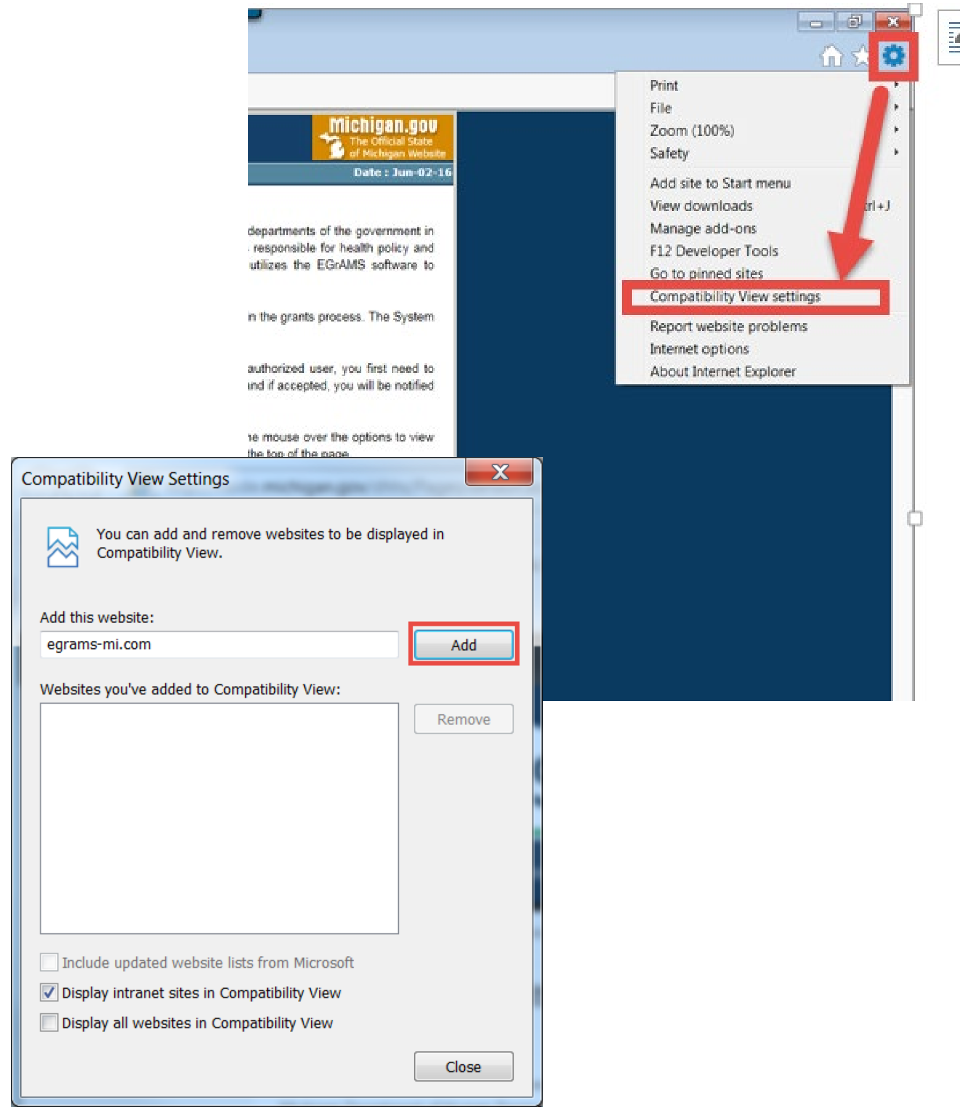
2. Key in the website URL address

   https://egrams-mi.com/mdhhs

3. Click ‘Add’

   The website will be added to the Compatibility View box. EGrAMS should operate correctly in the **Internet Explore** browser.

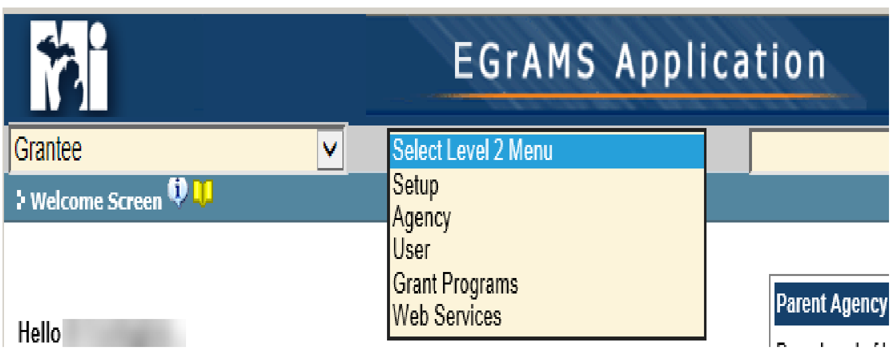
4. Click the ‘Close’ button when done.



Portal vs. MDHHS

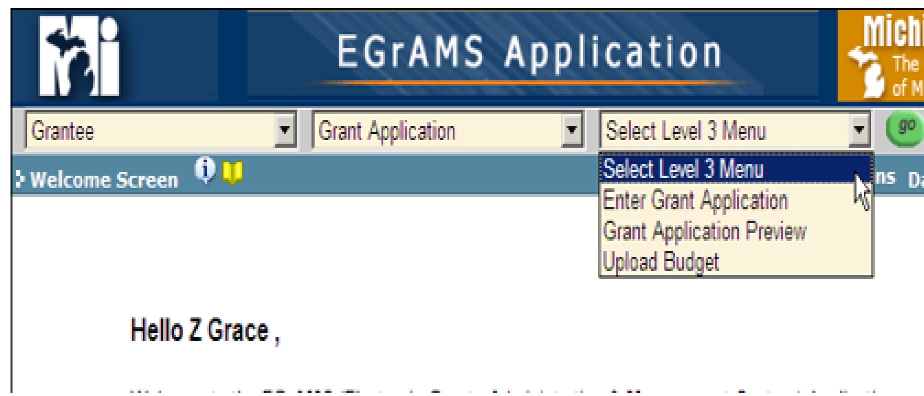
https://egrams-mi.com/portal/user/Home.aspx

- Create User and Agency Profiles
- Maintain User and Agency Profiles
- The second level choices will be different (i.e. 'Setup', 'User', 'Agency')



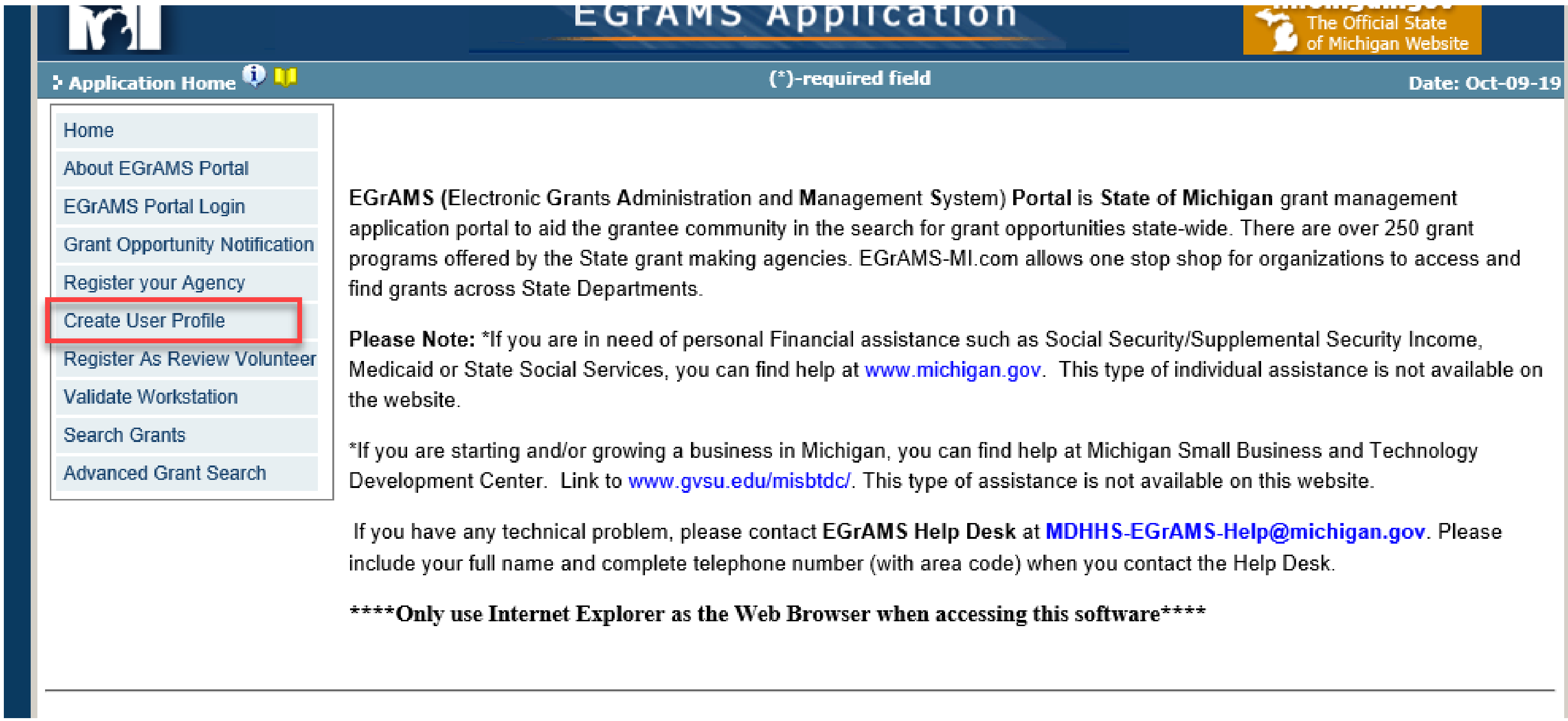
https://egrams-mi.com/mdhhs/user/home.aspx

- Access to Applications
- Enter Applications
- Enter Progress Reports
- Assign Users
- View Agreements



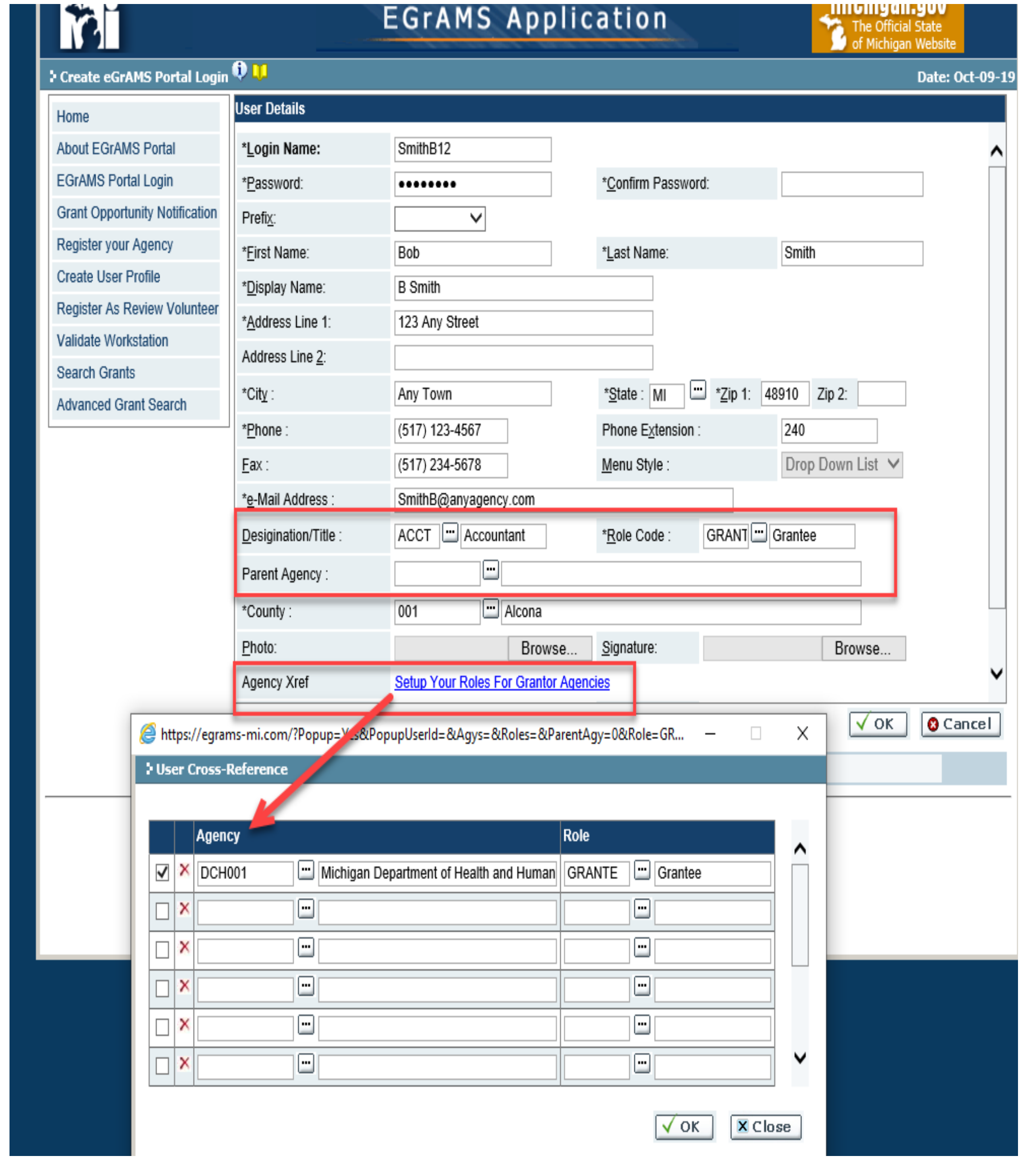
Creating User Profile

- Go to Portal website https://egrams-mi.com/portal/user/Home.aspx
- Select ‘Create User Profile’ hyperlink from the ‘Navigation Menu’ option.



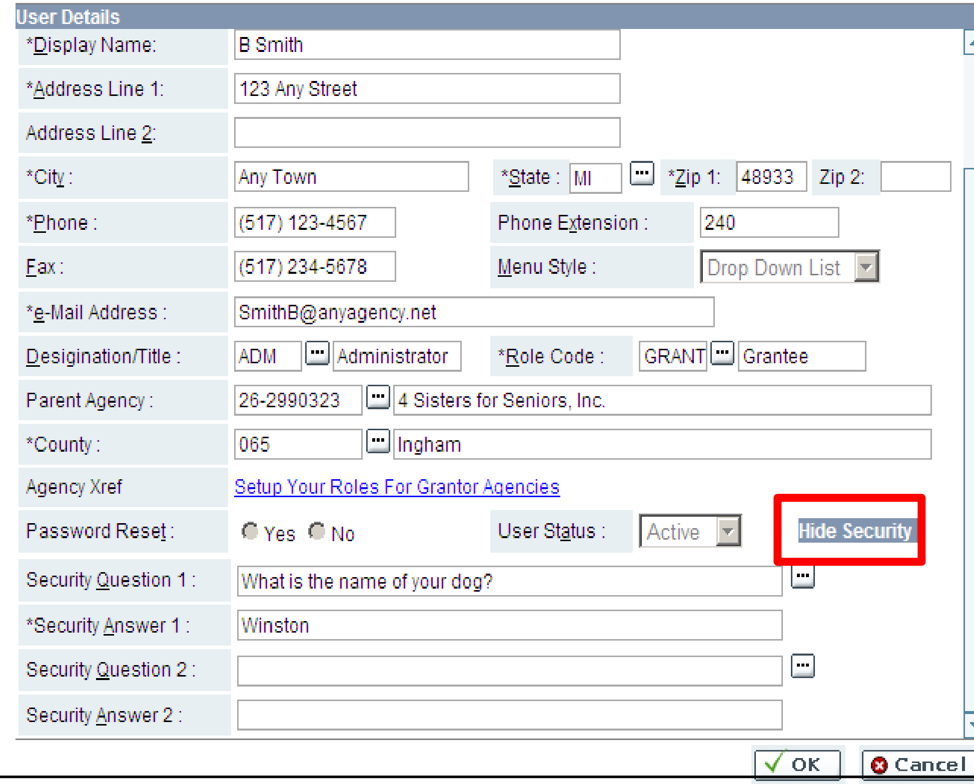
Creating User Profile

- The User Profile screen will be displayed (as shown).
- Enter your information
- **Designation/Title:** Enter your role at your agency.
- **Role Code:** Only Select ‘GRANTEE’
- **Parent Agency:** Using the look up icon, ··· select your agency name
- **Agency Xref:** Click on ‘Setup Your Role for Grantor Agencies’.
  - A pop-up window displays the User Cross-Reference screen, as shown.
  - Agency: Select ‘*Department of Health and Human Services*’ from the ‘Lookup’ icon.
  - Role: Select ‘Grantee’ using the ‘Lookup’ icon.
  - Click ‘OK’ to save. The pop-up window will close. Continue creating the User Profile



Creating User Profile

- Click ‘Show Security’
  - The window expands, you may need to scroll down
  - Select a security question, using the ‘Lookup’ icon.
  - Enter the respective answer to your selected security question
  - **Entry is case sensitive**
  - Click ‘OK’ to create your user profile
  - Click ‘Cancel’ to discard

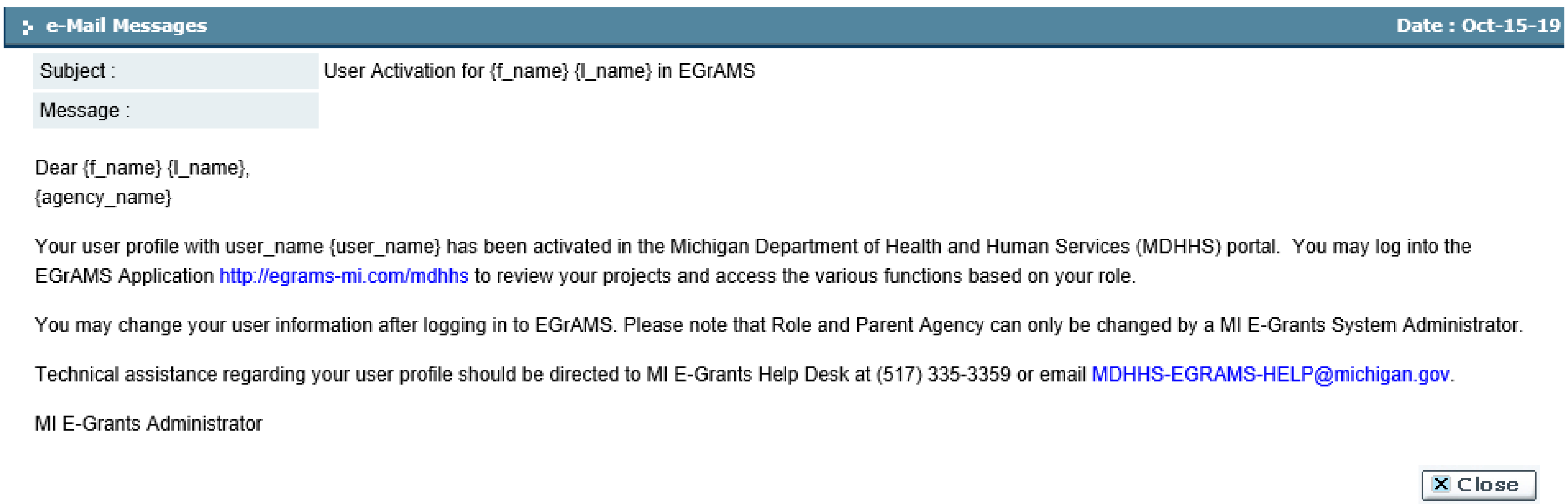


- *All Users need a user name and password to access EGrAMS.*
- *All Users manage their own password (alphanumeric **only**).*
- *You need to create your User Profile only **once**.*
- *Your User status will be ‘Inactive’ until the ‘Project Director’ from your agency activates the user and assigns you to a grant program.* ***Once activated,*** *the system sends the user an email notifying them their account has been activated.*

Becoming a EGrAMS User

After creating your User Profile:

- Contact your Agency's 'Project Director' to activate your User account within EGrAMS.
- ***NOTE:*** No 'Profile Completion' email will be sent.
- Users do **not** have access to the Grant Application until activated by the Project Director.
- Once the Project Director has activated the new User's account, a 'Confirmation' email will then be sent directly to the new User via the EGrAMS System. ***NOTE***: If you lock yourself out of the system (i.e. de-activate your account), the Project Director must re-activate your account.



e-Mail Messages **Date : Oct-15-19**

Subject :	User Activation for {f_name} {l_name} in EGrAMS
Message :	

Dear {f_name} {l_name},
{agency_name}

Your user profile with user_name {user_name} has been activated in the Michigan Department of Health and Human Services (MDHHS) portal. You may log into the EGrAMS Application http://egrams-mi.com/mdhhs to review your projects and access the various functions based on your role.

You may change your user information after logging in to EGrAMS. Please note that Role and Parent Agency can only be changed by a MI E-Grants System Administrator.

Technical assistance regarding your user profile should be directed to MI E-Grants Help Desk at (517) 335-3359 or email MDHHS-EGRAMS-HELP@michigan.gov.

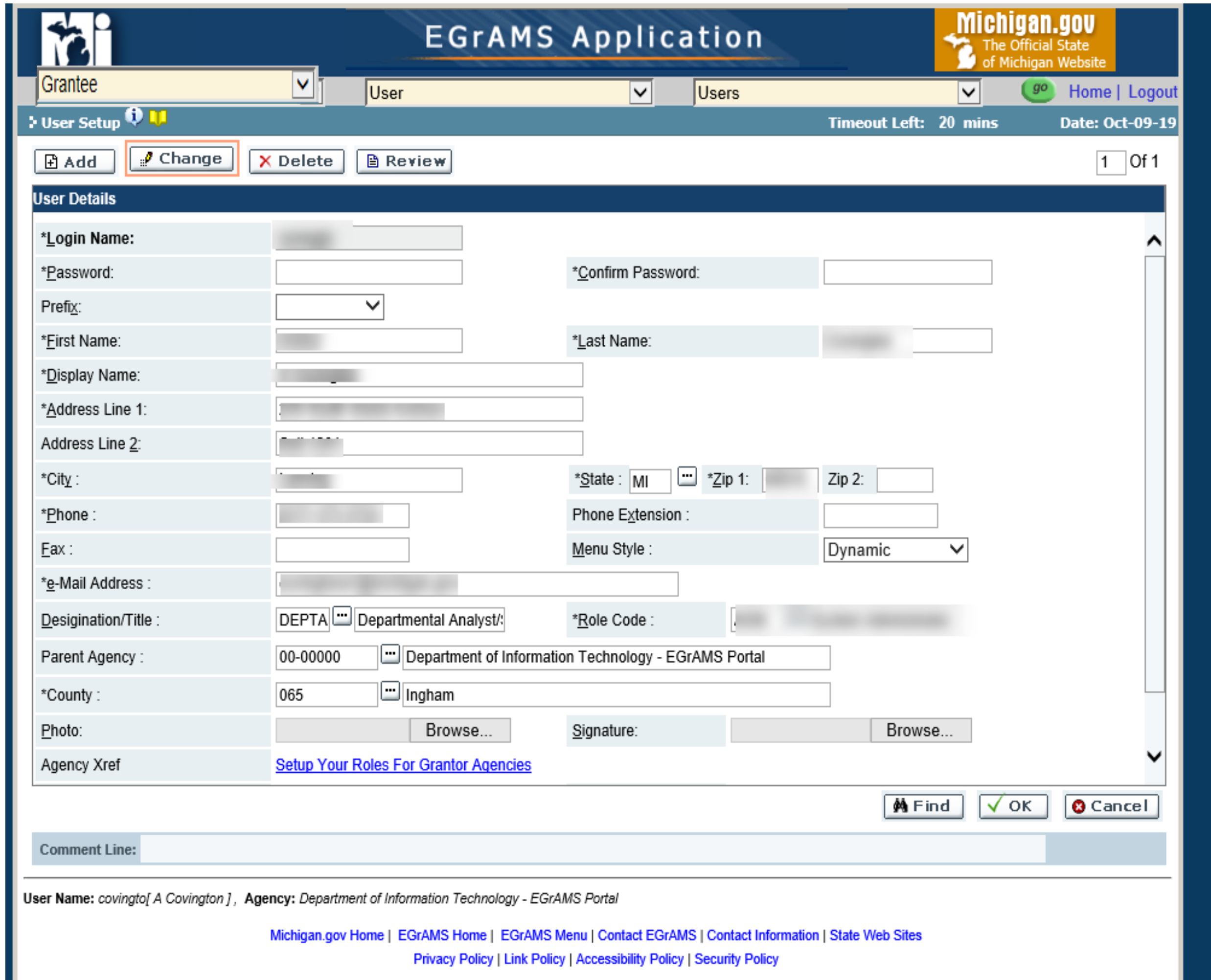
MI E-Grants Administrator

Close

[Quick Links](#)

Managing your User Profile

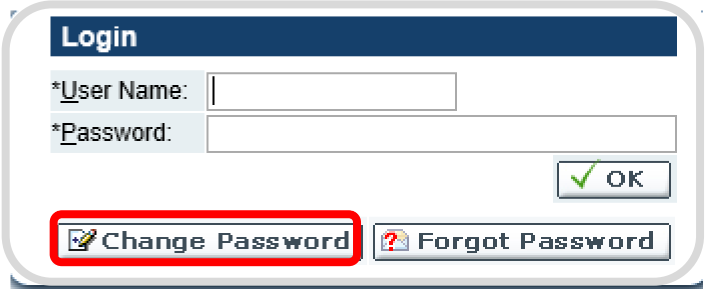
- Log into the **PORTAL** website https://egrams-mi.com/portal/user/Home.aspx
- Select: Grantee > User > Users
- Select 'Change'
- Enter your login name
- Click 'Find'
- Make any changes
- Click 'Ok' to save changes



Note: You can NOT change your login name or Parent Agency

Changing Your Password

To change your password, select ‘EGrAMS Login’ from the navigation menu, click the ‘ Change Password’ button.



The system will display the change password screen:

- Enter your User Name and old Password.
- Enter your new Password & retype new Password (alphanumeric **only**).
- Click ‘OK’ to save new Password.
- Click ‘Cancel’ to discard.

If your user name or password are incorrect, the system will display:

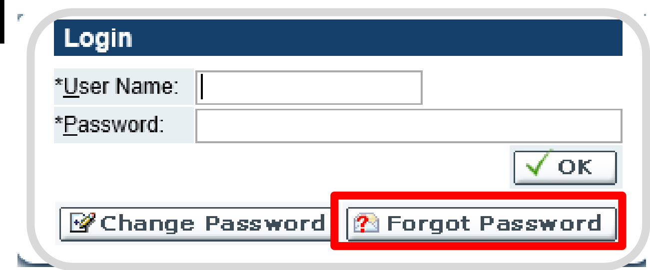
- An error information message.
- Try again, use the ‘Forgot Password’ option, see next slide

NOTE: Password expires every 120 days

You may ***Change*** your password, if:

Your password has expired or you are warned your password will expire in 7 days

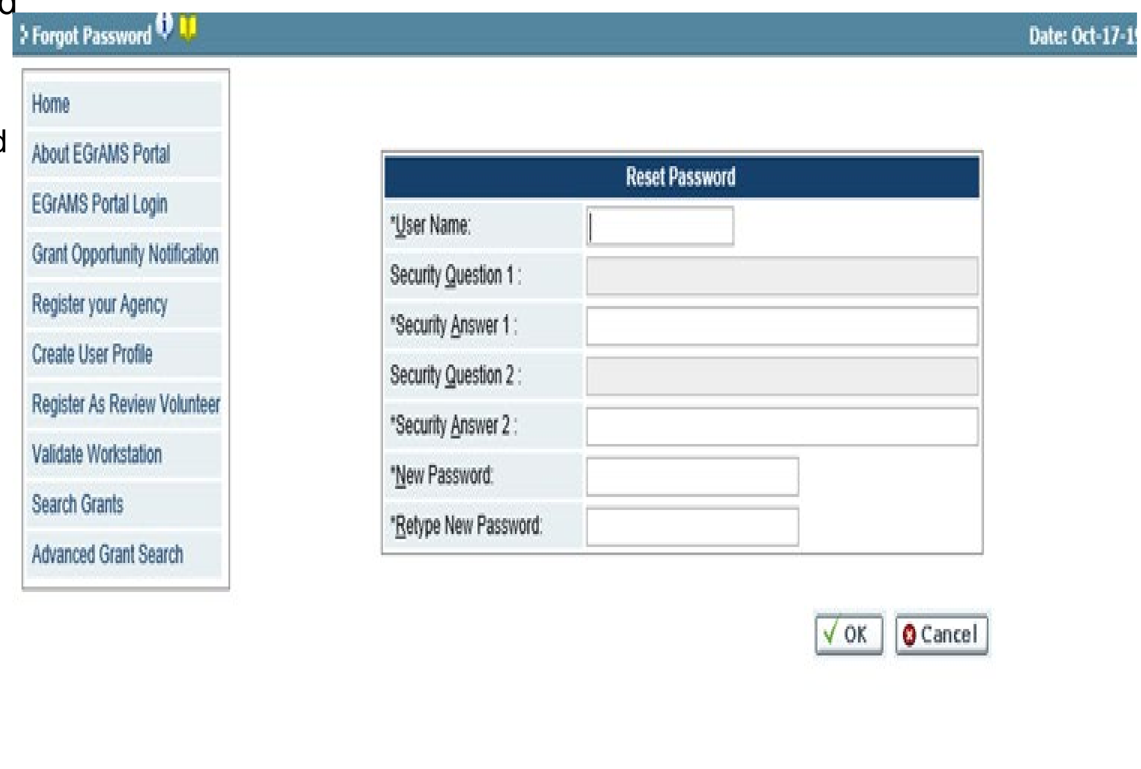
Forgot Password



To reset your password, select ‘EGrAMS Login’ from the Navigation Menu option, click the ‘Forgot Password’ button.

The system will display the reset password screen.

- Enter your ‘User Name’, click the tab key.
- Your security question(s) that you registered with your User Profile will appear.
- Enter the answer to your security question(s).
- Enter your new Password & retype new Password (alphanumeric **only**).
- ‘OK’ to save new Password.
- ‘Cancel’ to discard the change.



If your User name or security question answers are incorrect, the system will display:

- An error information message.
- Try again OR call the EGrAMS Helpdesk

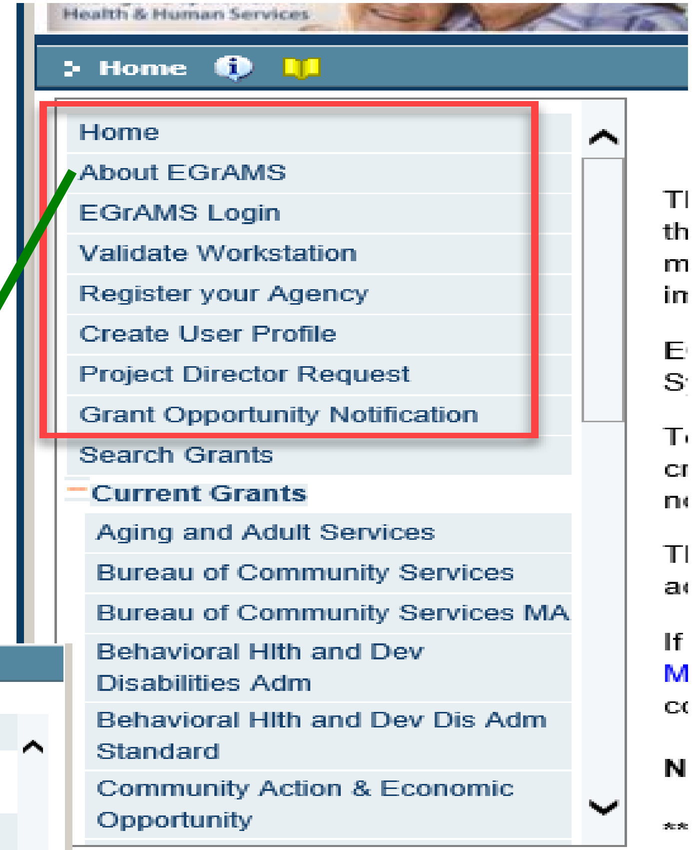
Note: Contact the EGrAMS Help Desk with Questions: MDHHS-EGRAMS-HELP@michigan.gov or (517) 335-3359

Navigating with EGrAMS

- Navigation Menu
- Obtaining General Grant Program Information
- System Navigation Tools
- Menu Styles
- System Messages
- System Warnings

Navigation Menu

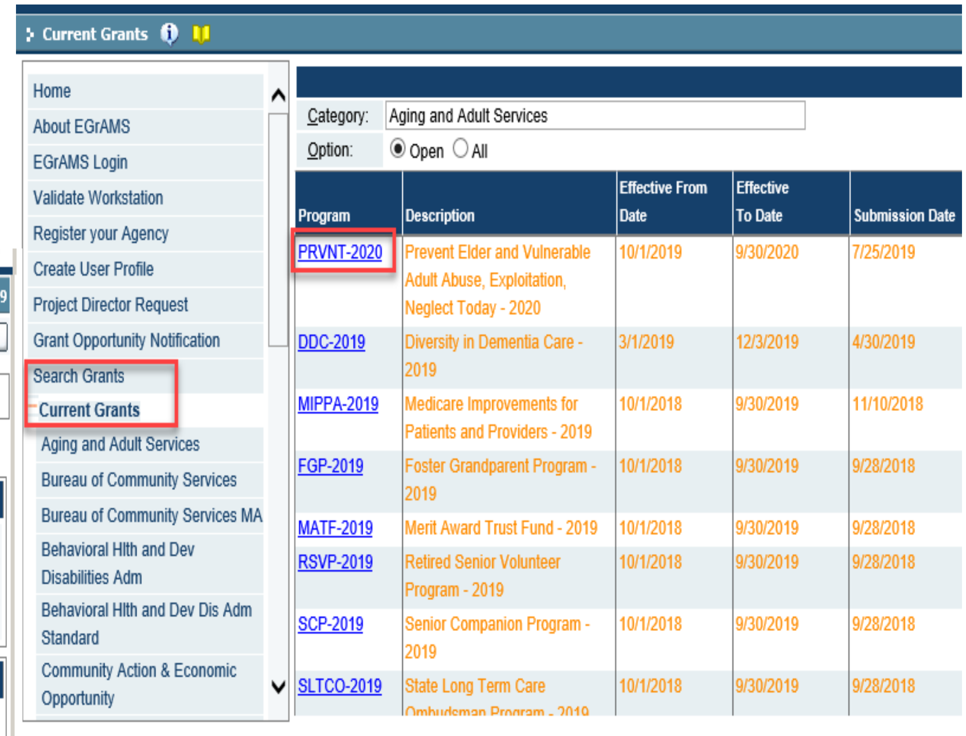
- Options on the ‘Home’ page that can be accessed without logging into the system:
  - About EGrAMS (Click for Training Manuals)
  - EGrAMS Login
  - Validate Workstation
  - Register your agency
  - Create User Profile
  - Project Director Request
  - Grant Opportunity Notification
  - Search for Grants

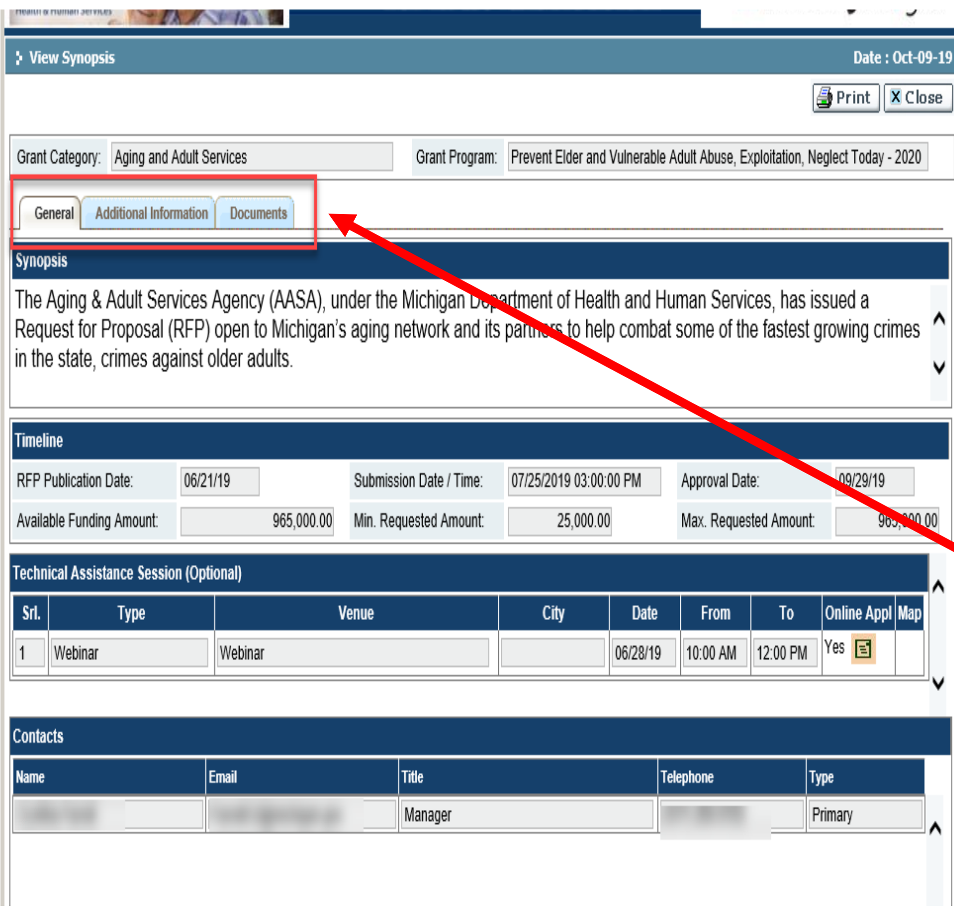


[Quick Links](#)

Obtaining General Grant Program Information

1. Click 'Search Grants' to look up specific grants
2. Under 'Current Grants' select the program office to see current grants under that program





3. Select the grant program and a pop-up window will appear
4. This will contain current information for this grant program

System Navigation Tools

'Lookup' Buttons

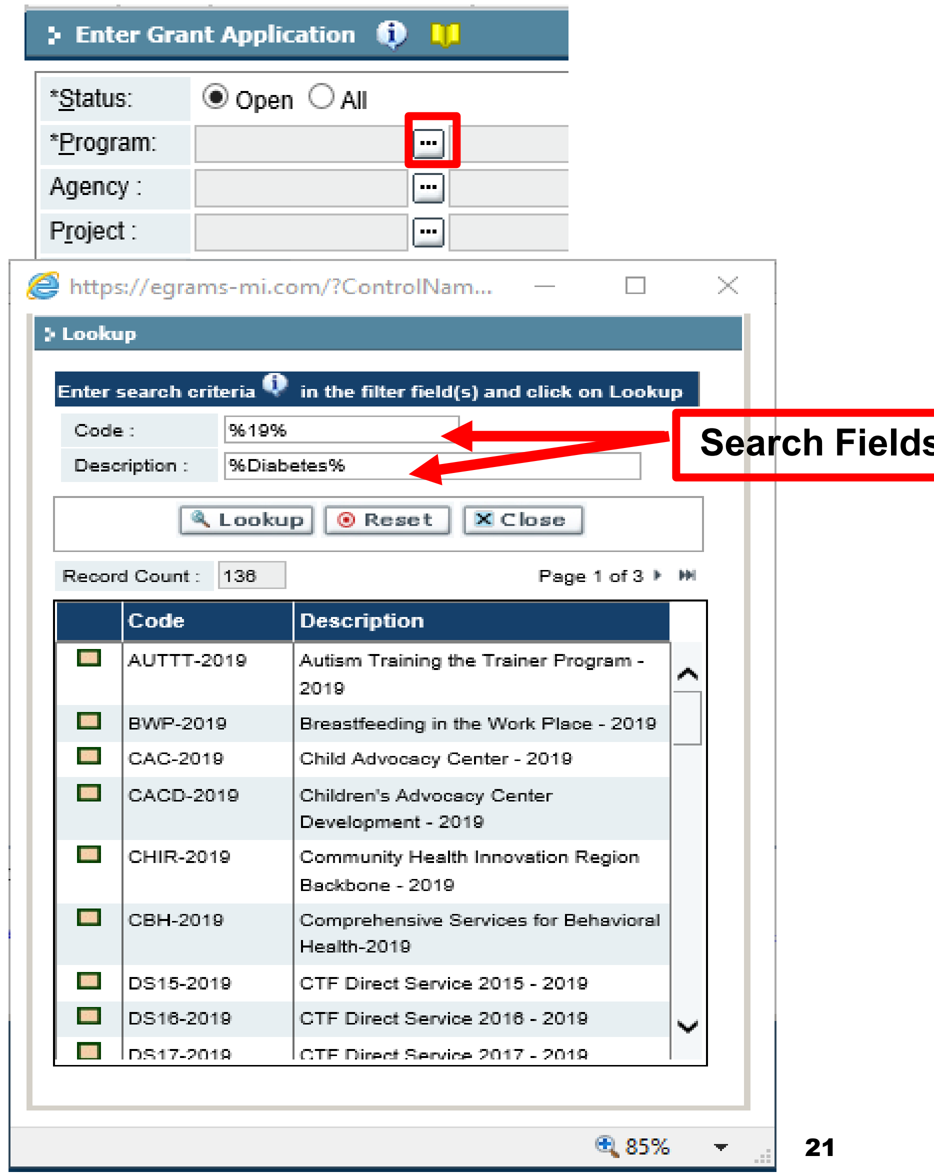
- Allow a user to search options for a various field
- Click on the ⋯ 'Lookup' icon.
- Based on the field, the system pop-up displays all available options.

Enter desired criteria in the Search Fields:

- User defined search criteria from code and/or description.
- Wild card character is %

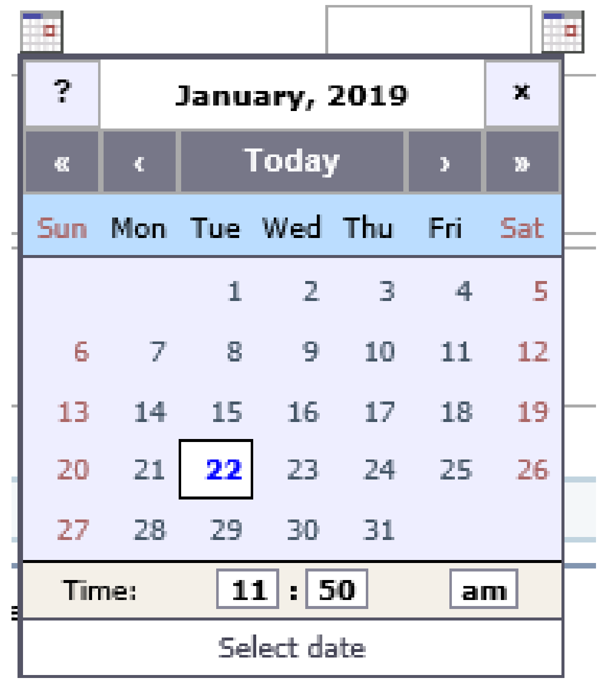
Selecting the desired option

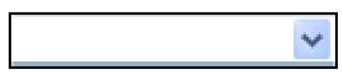
- To select the desired option, click in the box, creating a check mark
- The Lookup pop-up will close upon a selection and the selected options will appear in the 'Lookup' field on the parent screen.

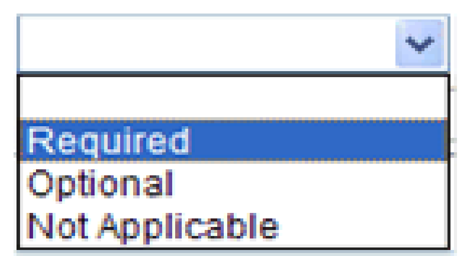


System Navigation Tools

- **Calendar Lookups -** Calendar Lookups enable users to select the appropriate date value across month, year, etc. as required.



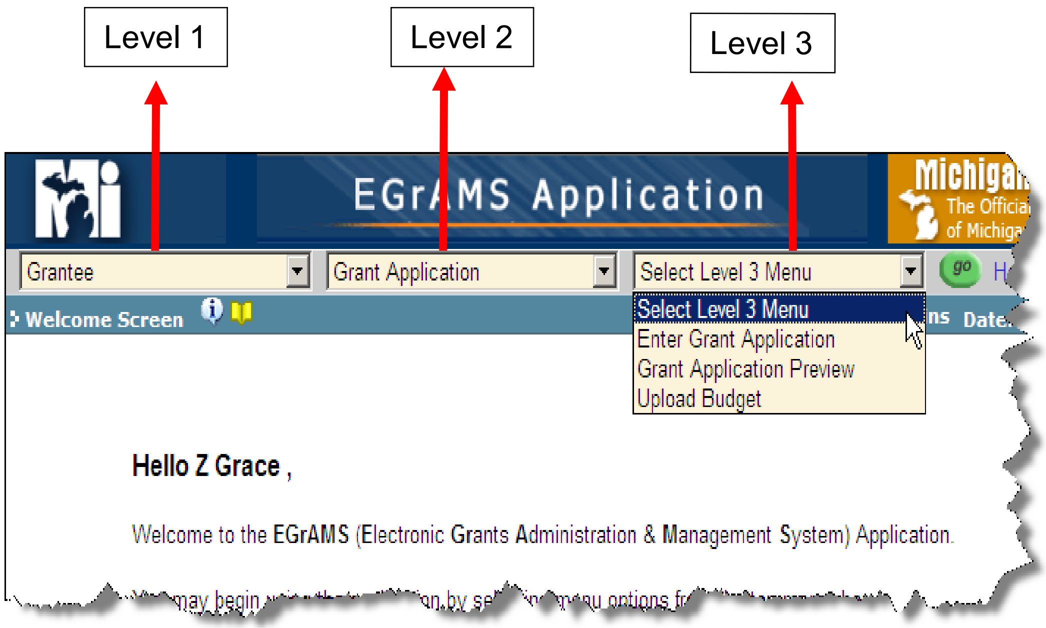
- **Dropdowns**
  - Click on the 'Dropdown' icon  to view a list of available options.
- **Selecting the desired option**
  - Click on the displayed option to select the respective choice
  - In addition, the user may use the up and down arrow keys to view the available choices.



Menu Styles

EGrAMS supports three type of menus – **Dropdown, Menu List, and Dynamic***

- The **Dropdown Menu** is the default menu choice.
- After logging into EGrAMS successfully, the user can move forward using the Dropdown Menu choices.
- From any screen the User:
  - Selects Level 1 Menu. In this case the user selects **Grantee**.
  - Selects Level 2 Menu. In this case the user selects **Grant Application**.
  - Selects Level 3 Menu. In this case select **Enter Grant Application.**
  - Click on the 'Go' button



*Dynamic is only recommended for advances system users.

[Quick Links](#)

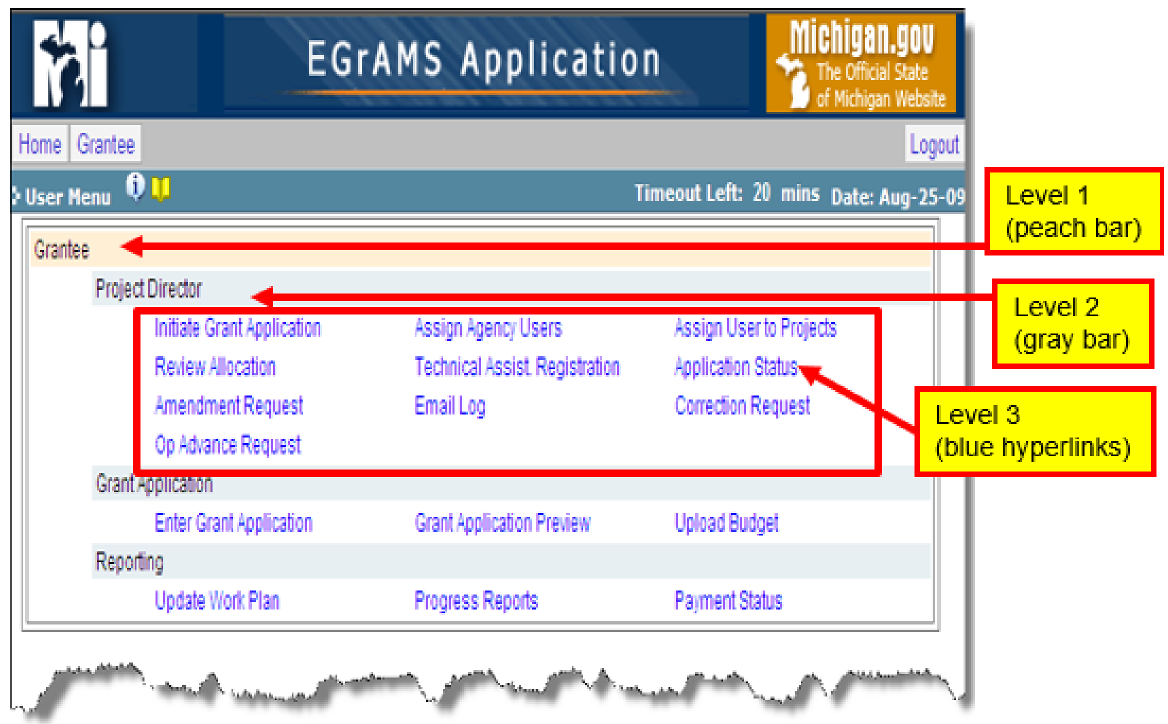
Menu Styles

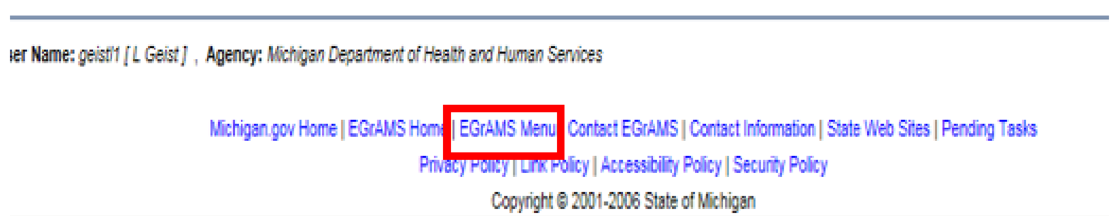
The **Menu List** is a standard feature and can be accessed from <u>any</u> screen by clicking on the 'EGrAMS Menu' hyperlink located at the bottom of the screen.

The **Menu List** displays all the Action screens a user has access to within the EGrAMS system.

After logging into EGrAMS, the use can move forward using the Menu List by following below instructions:

- From any Action screen, click c '**EGrAMS Menu**' link in the Footer section of the screen.
- The system displays a Menu List, based on the User's assigned Permission Code/Rol within the system.
  NOTE: Different permissions display different menu options.
- Select the desired Action scree by clicking on blue hyperlink (a.k.a. Level 3 menu).



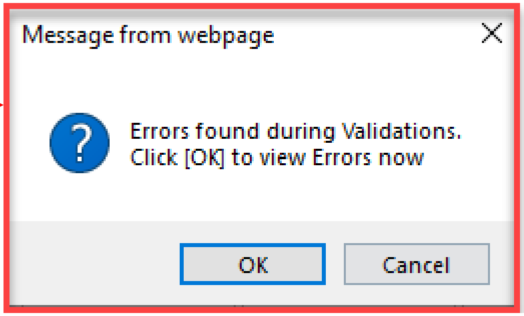


System Messages

- Expect pop-up messages: they are built into EGrAMS.
- Pop-up messages verify that the information entered by Users is the correct type of information for a given screen or field.
- For example, when EGrAMS validates an application or report, a pop-up will alert the user as to whether errors exist or not.

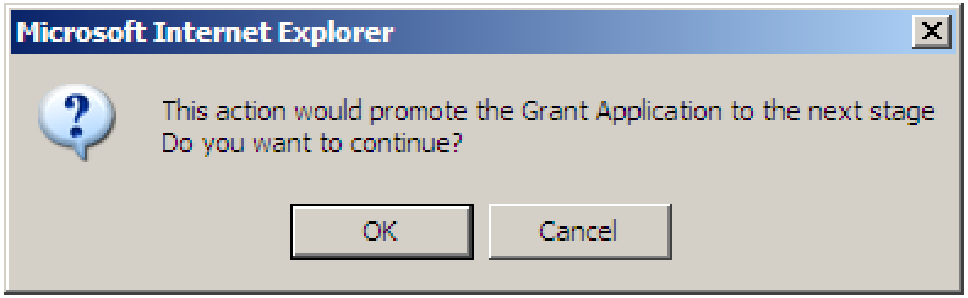
Information Message:

- Displays a pop-up window with the appropriate error or warning message.
- Click on 'OK' to acknowledge the message.



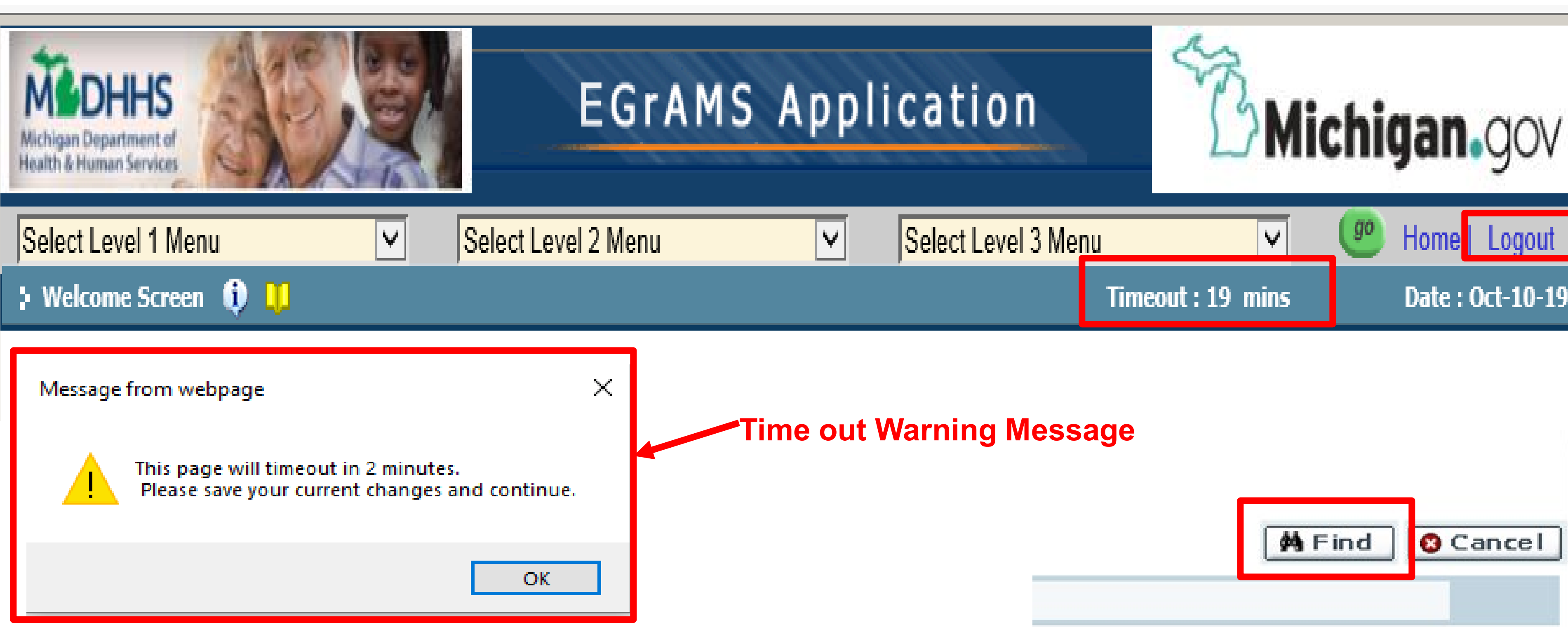
Confirmation Message:

- Displays a pop-up window with the appropriate error, warning, or confirmation message.
- Provides the User a choice to confirm or cancel a certain action.
- Click on 'OK' to confirm.
- Click on 'Cancel' to cancel the action.



WARNING

- **NEVER** use the ‘Back’ button or the ‘Refresh’ button from the Internet Explorer browser toolbar.
- Pay attention to the Timeout Left [Timeout Left: 19 mins] display. Save, if applicable, and refresh using the [Find] ‘Find’ button if it gets to 4 minutes.
- The system gives a warning (information) message at 2 minutes.
- Use the ‘TAB’ key or the mouse to navigate across fields.
- Always [Logout] after you complete your work.



System Security

- Role & Permissions in EGrAMS
- Project Director - Assigning Users to Application

Roles & Permissions in EGrAMS

EGrAMS is set up to provide controlled access to the system. Based on the Role, ability to add, modify or delete information is further limited by a User's Permission

- **Permission Codes (all permission codes can do data entry within the system)**

  These codes determine what Permissions are given to each User.

Required Roles:

- **Project Director –** A person from your Agency responsible for performing administrative tasks such as: Assigning other Agency Users, activating and deactivating users, restricting access to projects, etc.
- **Financial Officer** – Oversees financial operations and submits financial reports for your Agency.
- **Authorized Official** – Authorized to submit project applications and sign a legal binding agreement on behalf of your Agency.

Other Roles:

- **Grant Writer** - A person from your Agency responsible for entering grant application information
- **Report Administrator** – A person from your agency responsible for completing and submitting non-financial reports

Project Director – Assigning Users to Application

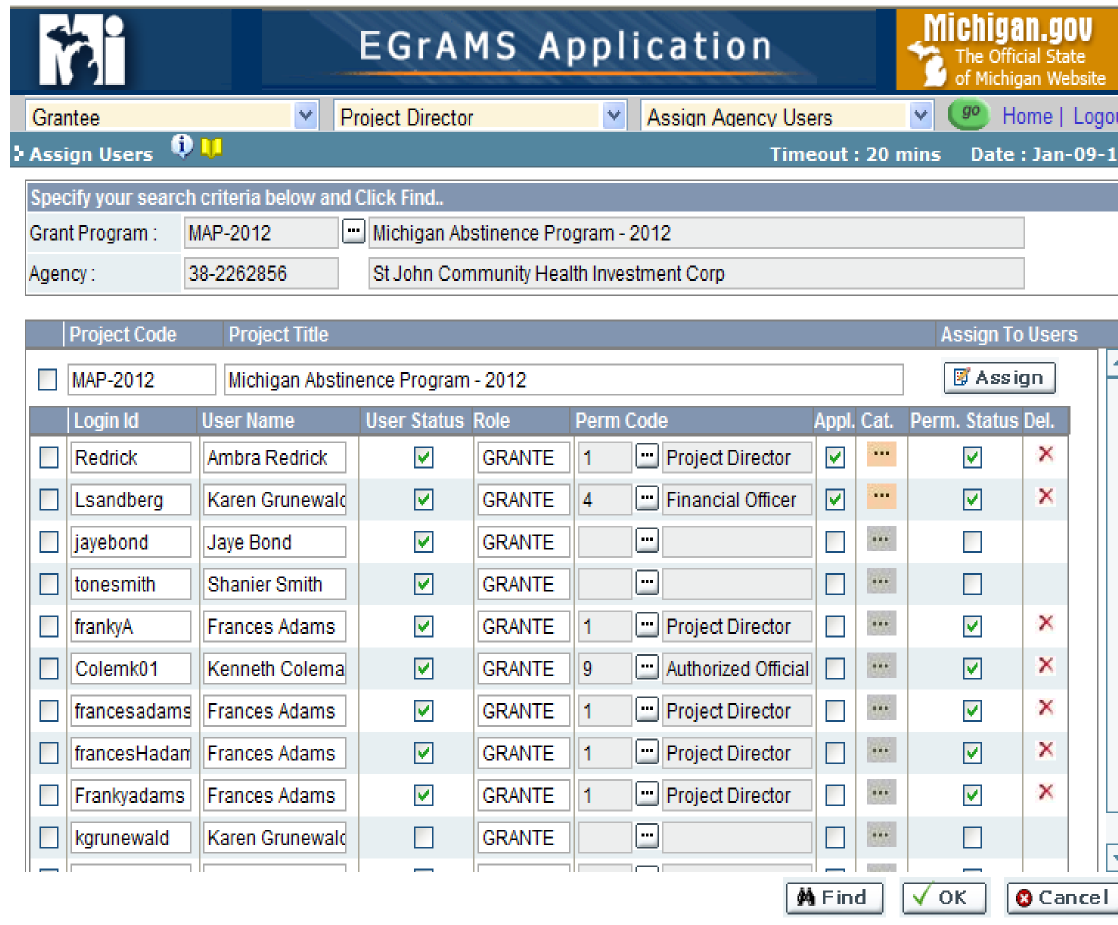
ONLY the Agency's **<u>Project Director</u>** can assign users

- Navigate to: **Grantee > Project Director > Assign Agency Users** on the drop-down menus and click 'GO'

Search by:

- **Grant Program**: Select a Grant Program using the 'Lookup' icon.
- **Agency**: System displays pre-populated information.
- Click 'Find'

Click the 'Assign' button.



User Listing: All registered Users of the system for your agency will appear

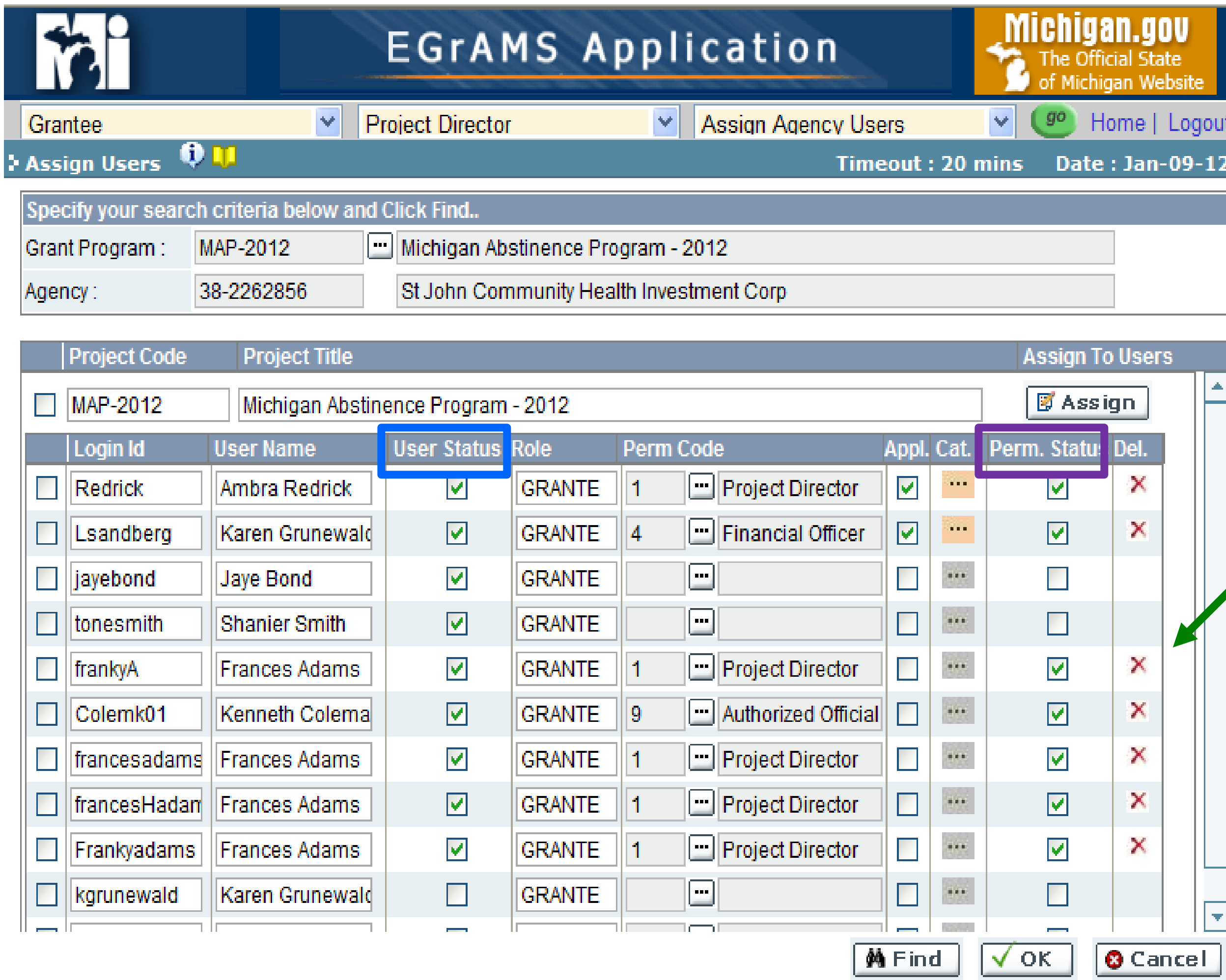
- If the User is not shown, verify with the user that he/she has created profile.
- If the User has created a profile and you're still unable to view them in the list contact the EGrAMS Helpdesk

User Status: Check box next to the name of the user to activate user to selected program.

Role: System has pre-populated information.

Project Director – Assigning Users to Application

Until a Project Director activates & assigns a User, the User status is inactive, and they are unable to access the MDHHS website.



User Status: Allows the User access to the system

- To grant access to system select check box.
- To remove access, uncheck box.

Perm. Status: Allows the User access to the program

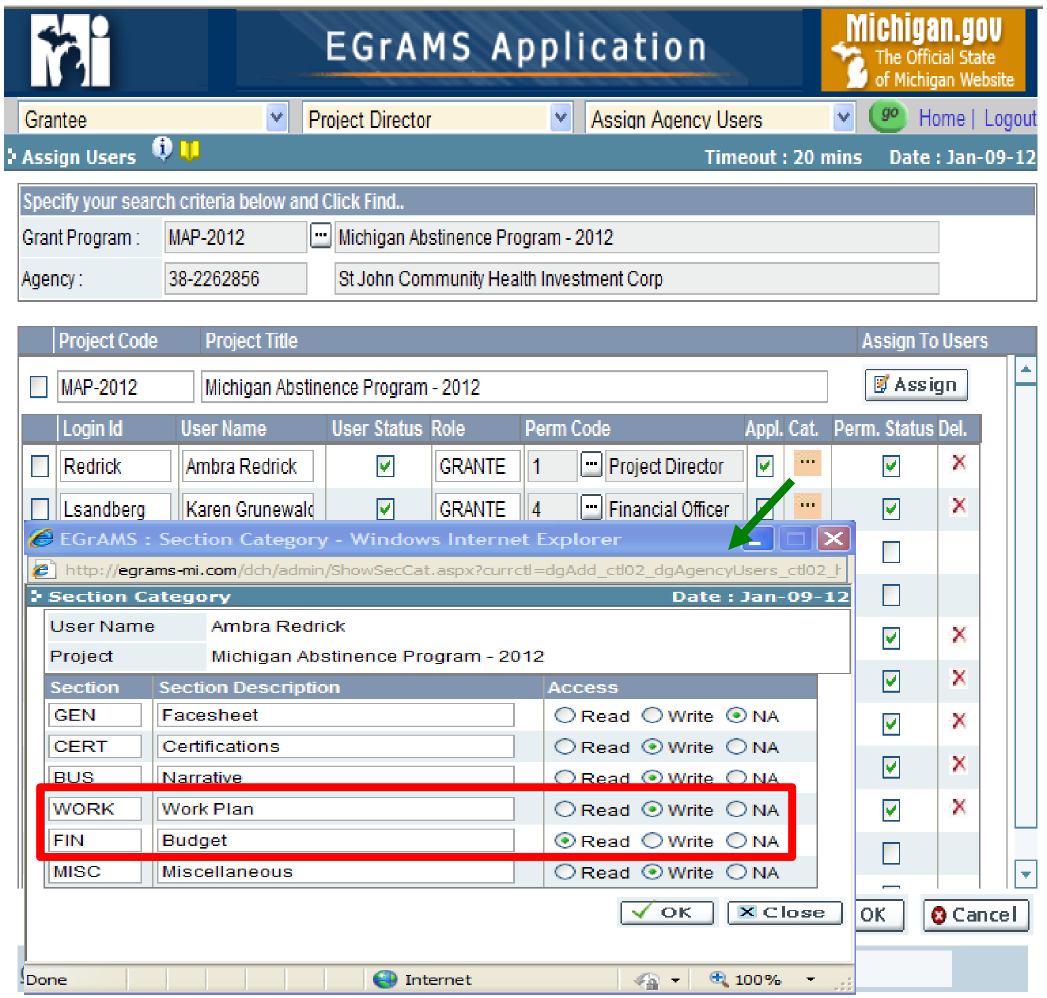
- To grant permission access to program select check box.
- To remove access grant permission to program, uncheck box in the perm. status column.

Delete: Allows a user to be deleted from a selected program. (Step can only be done after a user has been assigned to a program).

- Select the red 'X' icon, which turns into a red trash can icon.
- Click 'OK'
- A user cannot be entirely deleted from the system

Project Director – Assigning Users to Application

The Project Director is able to restrict access to specific application sections. By default a user assigned to an application has 'Write' permission to all section levels.



- To restrict/assign access at a section level
  - **Cat. Appl**.: Check the box in the 'Category Application. This will enable the selection of the category icon specifying further restrictions.
  - **Category**: Click the 'Lookup' icon. (The system will display a pop-up window of the section category screen)
- Section Category Screen
  - **Section**: System section code.
  - **Section Description**: Application Section Name.
  - **Access**: Click on the radio button to select the access type:
    - Read: Read only view of application section.
    - Write: Write to the application section.
    - NA: No Access to the application section.
- 'OK' = save
- 'Cancel' = discard.
- Click 'OK' again on main page to save all user permission changes

Questions?

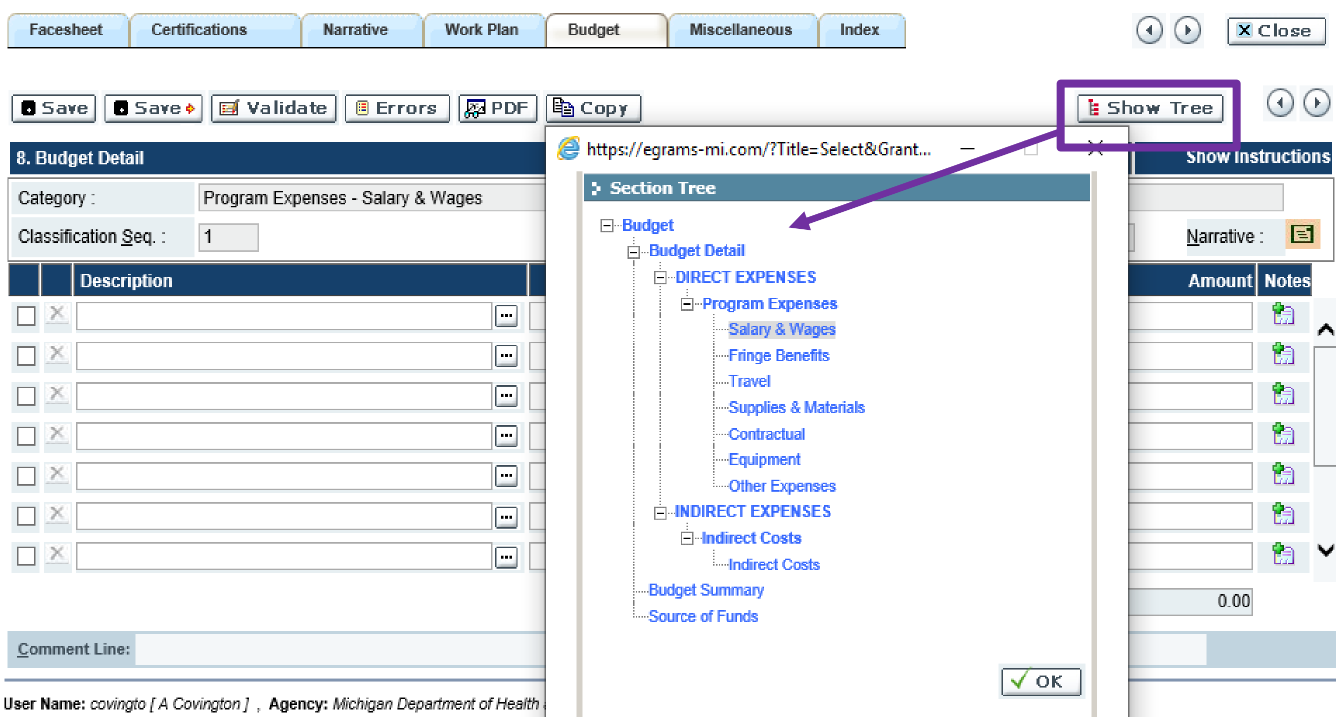
Grant Application

- Allocation Notification
  - Email Notification
- Accessing Application
- Understanding Application Tools
  - Application Sections (Tabs)
  - Action Buttons
- Application Entry
  - Facesheet
  - Narrative
  - Workplan
  - Budget
  - Misc.
  - Index

Applications and Amendments

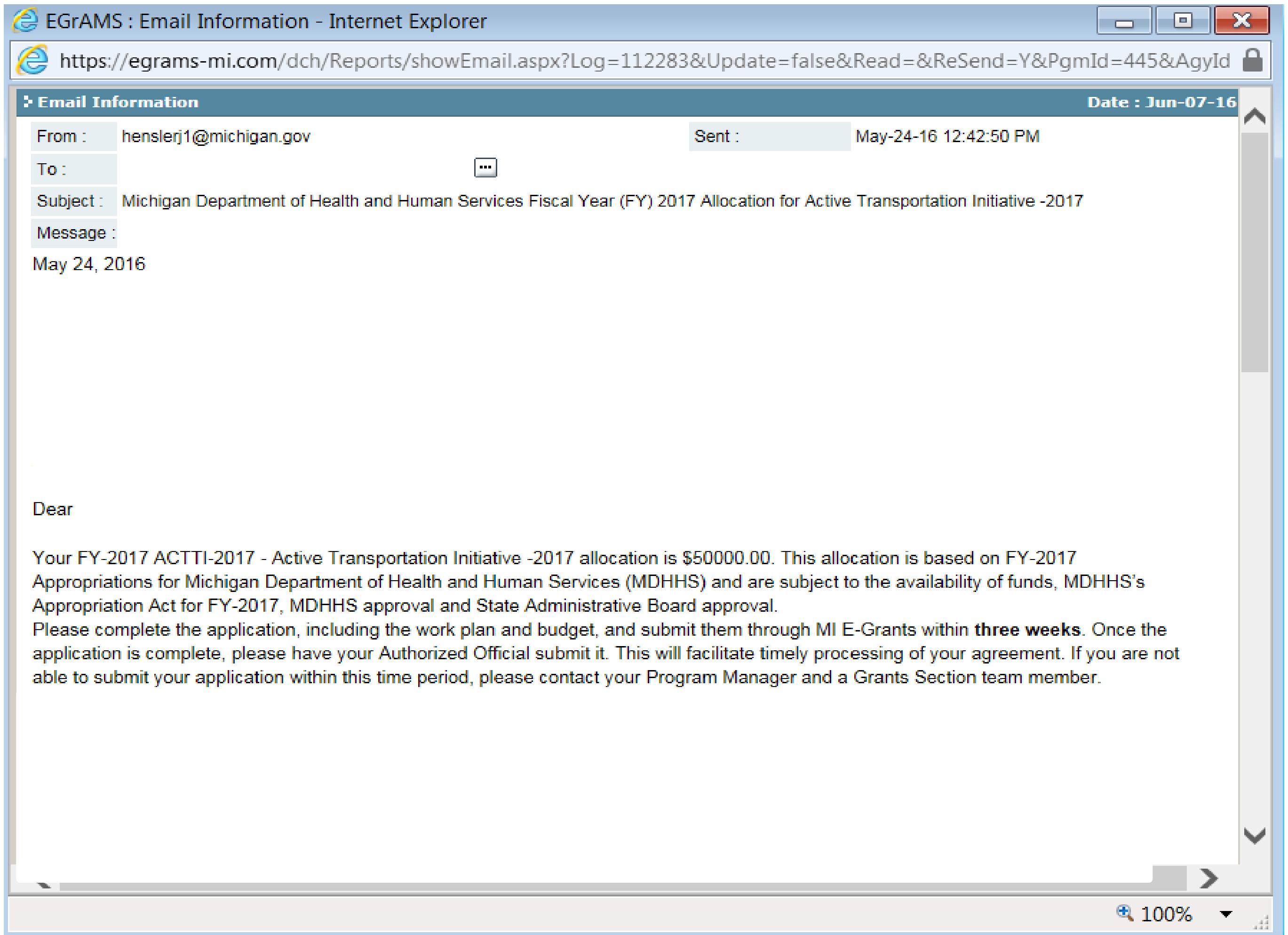
- The following instructions (pages 36-82) apply to both original project applications and any project amendments that may be processed during the grant period,
- For Amendments, only the Facesheet, Work Plan and/or Budget sections may be available to update

Show Tree: A navigation tool that assists the grantee in moving to a specific budget category screen by clicking on the link and clicking the 'OK' button.



Notification of Award

MDHHS Publishes the Grant Agreement Application. The Grantee receives a system generated email which specifies allocation information.



EGrAMS : Email Information - Internet Explorer

https://egrams-mi.com/dch/Reports/showEmail.aspx?Log=112283&Update=false&Read=&ReSend=Y&PgmId=445&AgyId

Email Information **Date : Jun-07-16**

From :	henslerj1@michigan.gov	Sent :	May-24-16 12:42:50 PM
To :			
Subject :	Michigan Department of Health and Human Services Fiscal Year (FY) 2017 Allocation for Active Transportation Initiative -2017		
Message :			

May 24, 2016

Dear

Your FY-2017 ACTTI-2017 - Active Transportation Initiative -2017 allocation is $50000.00. This allocation is based on FY-2017 Appropriations for Michigan Department of Health and Human Services (MDHHS) and are subject to the availability of funds, MDHHS's Appropriation Act for FY-2017, MDHHS approval and State Administrative Board approval.
Please complete the application, including the work plan and budget, and submit them through MI E-Grants within **three weeks**. Once the application is complete, please have your Authorized Official submit it. This will facilitate timely processing of your agreement. If you are not able to submit your application within this time period, please contact your Program Manager and a Grants Section team member.

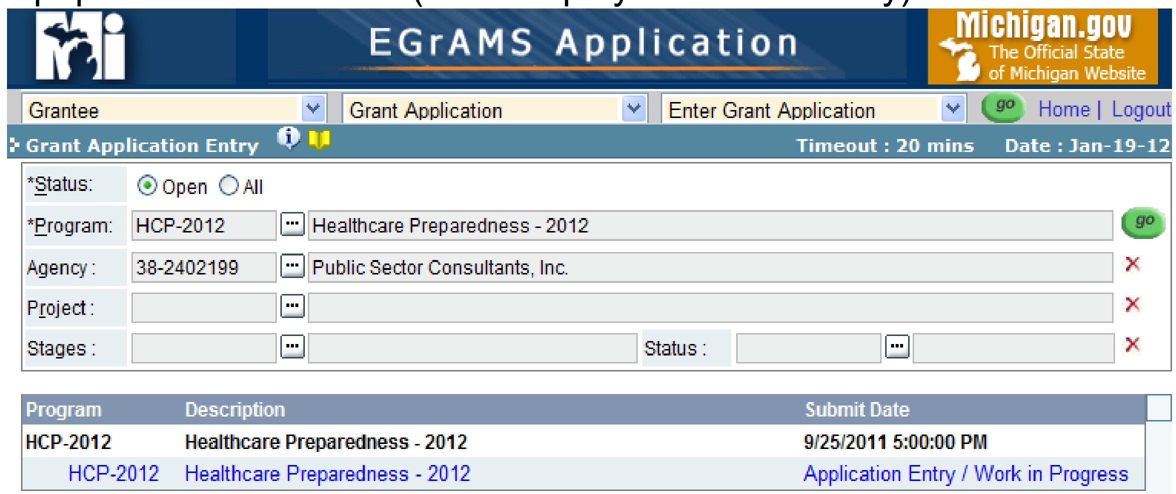
100%

Accessing the Application

Navigate to: **Grantee > Grant Application > Enter Grant Application**, from the drop-down menu. Click the 'Go' button.

Search by:

- **Grant Program**: Select a Grant Program using the 'Lookup' icon.
- **Agency**: System displays pre-populated information. (if not displayed automatically)
- Click "Go"



Additional search criteria, allows you to narrow down your selection.

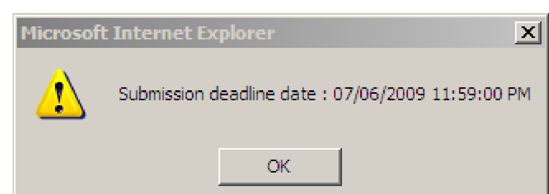
- **Project**: Select the Project, using the 'Lookup' icon (Only for Master and Comprehensive agreements).
- **Stages**: Select the Stage of the application, using the 'Lookup' icon
- **Status**: Select the status, after selecting a Stage, using the 'Lookup' icon Click the 'Go' button.

The system displays the available applications to which the user has been assigned.

- Click the blue hyperlink to enter the application

After selecting an application to begin, the system will prompt you to verify the application submission deadline date/time.

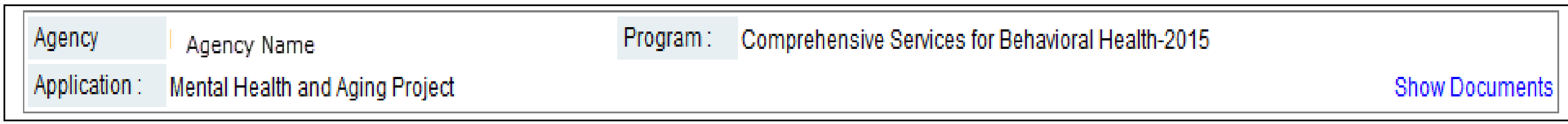
Click 'OK' to begin entering the application.



Cancel

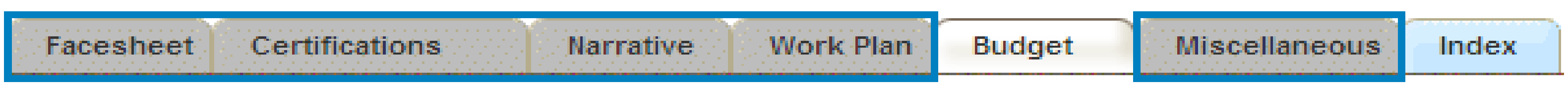
Application Section (Tabs)

- **Application Entry Header:**
  - Displays the name of the Agency, the Grant Program, Application Title and Show Documents hyperlink.
  - The header is displayed on all pages of the Grant Application.



- **Application Section Tabs:**
  - Displays Section tabs for all pages the respective Grant Project.
  - Clicking on a Section tab takes you to the first page of that Section.
  - The Section tab without color identifies your location in the Application.

  - The Section tab which are gray color identifies restricted access to the Project Application.



Quick Links

Application Section (Tabs)

- Type of information stored in the various section tabs.

- Demographics
- Program
- Contacts

- Objectives
- Activities
- Activity Contact
- Activity Evaluation criteria
- Measurements

- Additional navigation tool
- Useful for tracking application progress and in identifying / correcting errors

- Certification & assurance agreement

- Project Synopsis is entered.
- Identify counties in which services will be delivered.

- If applicable, various attachments, support letters, etc.

- Financial details for the supported expense categories, including funding sources.
- Line Item details, if applicable
- Narratives
- Match details

Action Buttons

As the name suggests, the Action button performs the desired task.

'Arrow' buttons
- Allow you to navigate to the next or previous page.
- At the end of a Section, it navigates to the next or previous Section.

- Saves changes on a page two ways. Click on **'Save'** button to save the information on the current page.
- Click on Save to save the information and move to the next page of the application.
- Moving to the next page <u>without</u> saving your changes will result in a system warning message.

Click on **'Show Tree'** button to get a section tree structure breakdown.

Click on **'Copy'** button to copy information from a previous application.

Click on **'PDF'** button to view a PDF of the current section.

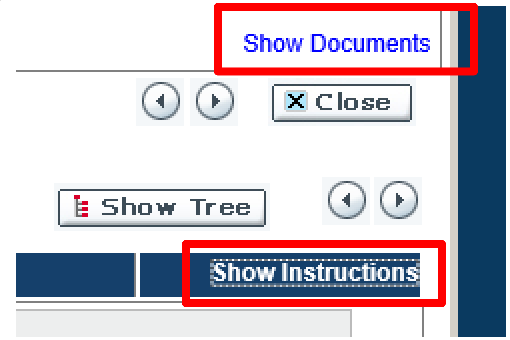
Click on **'Done'** button to validate the all section for errors and business rules in your application.

- The **'Errors'** button is enabled if errors are found after validation.
- If errors are found, click on 'Errors' to view error details.

Click on **'Validate'** button to validate the respective section for errors and business rules in your application.
Validate after each section

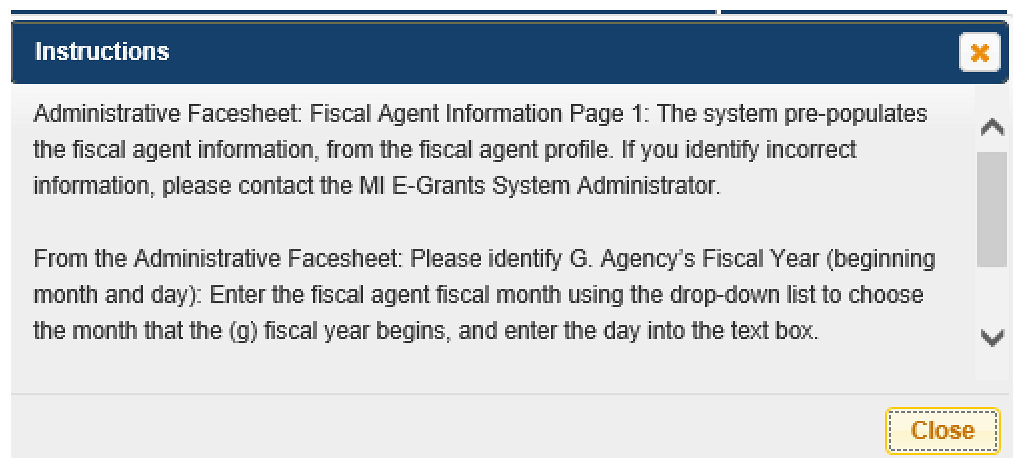
Action Buttons

Two very useful buttons: ‘Show Documents’ and ‘Show Instructions’



Show documents: Will show all the documents that are needed for this agreement

Show instructions: Will give instructions on how to fill out each section

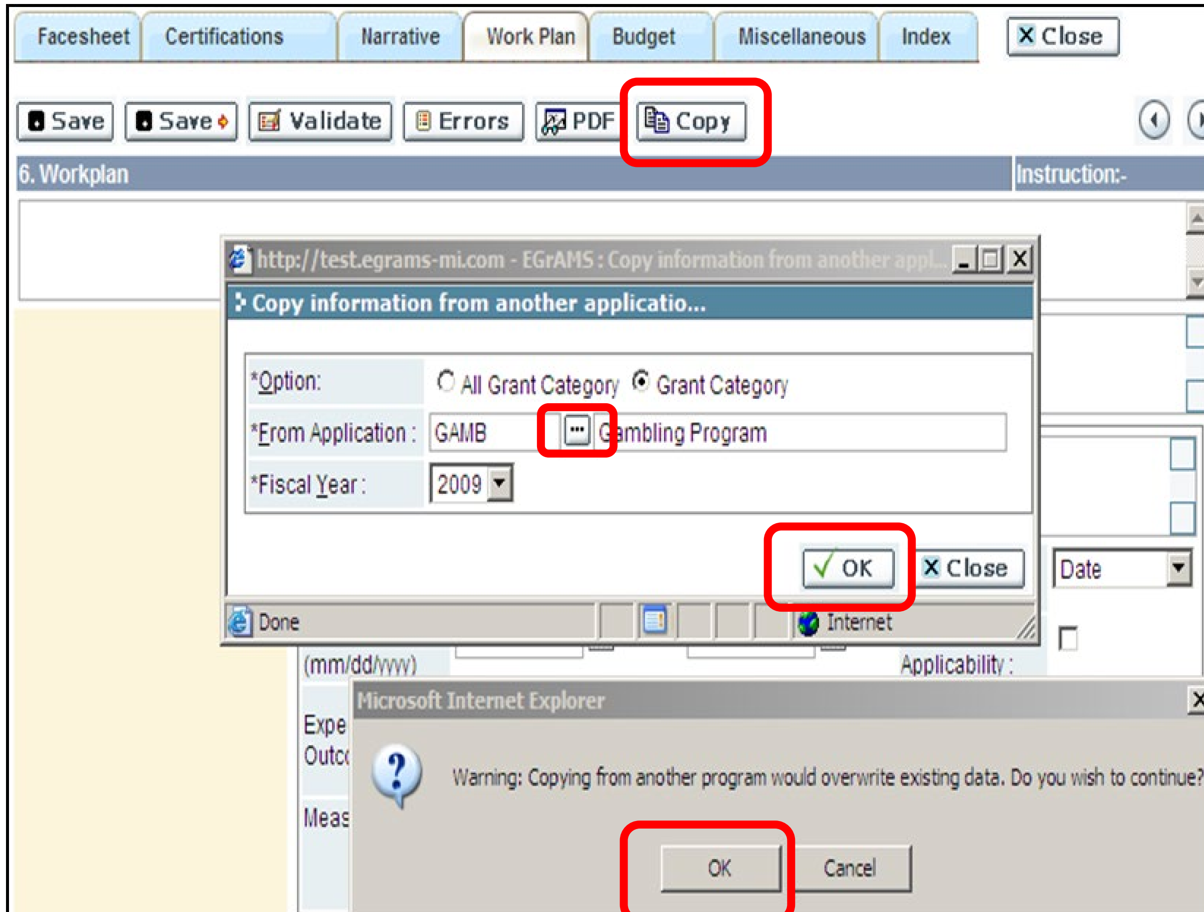


Action Buttons – Copy Function

The ‘Copy’ button allows users to copy sections of a previous grant application to the current grant application. This function copies the entire section and should only be done **prior to making edits**. Using this function after editing will replace the edited information with the prior year’s information.

Directions:

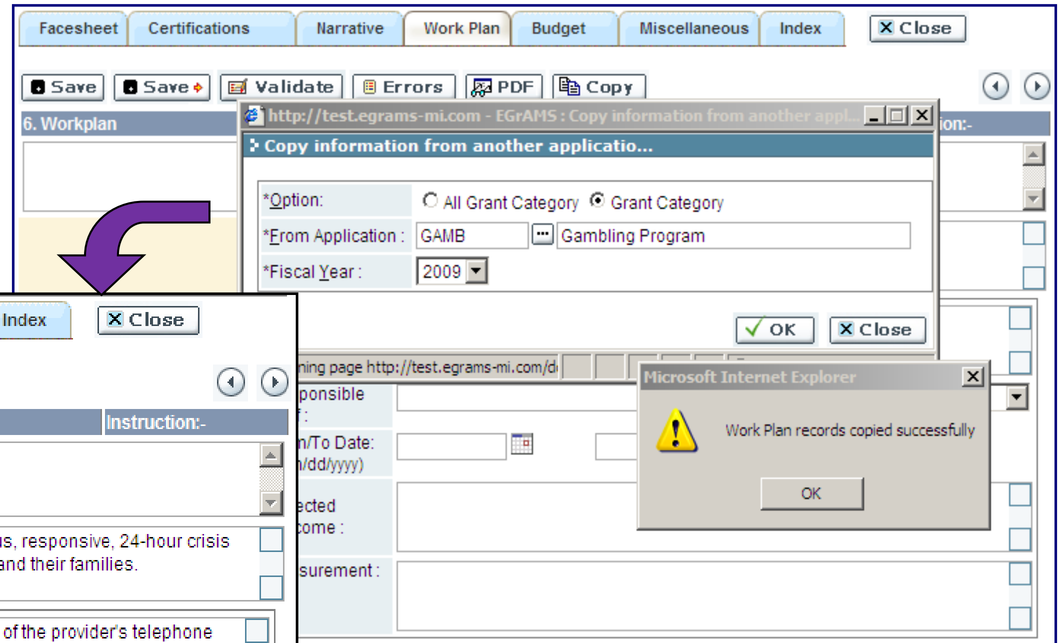
- Click ‘Copy’ button
- The ‘Copy information from another application’ pop-up window will open.
  - Select the ‘From Application’ using the ‘Lookup’ icon.
  - ‘Fiscal Year’ will pre-populate
  - Click the ‘OK’ button
- The system prompt you with a warning message:
  - Click ‘OK ‘ to continue
  - Click ‘Cancel’ to discard
- The ‘Copy information from another application’ pop-up window will refresh.

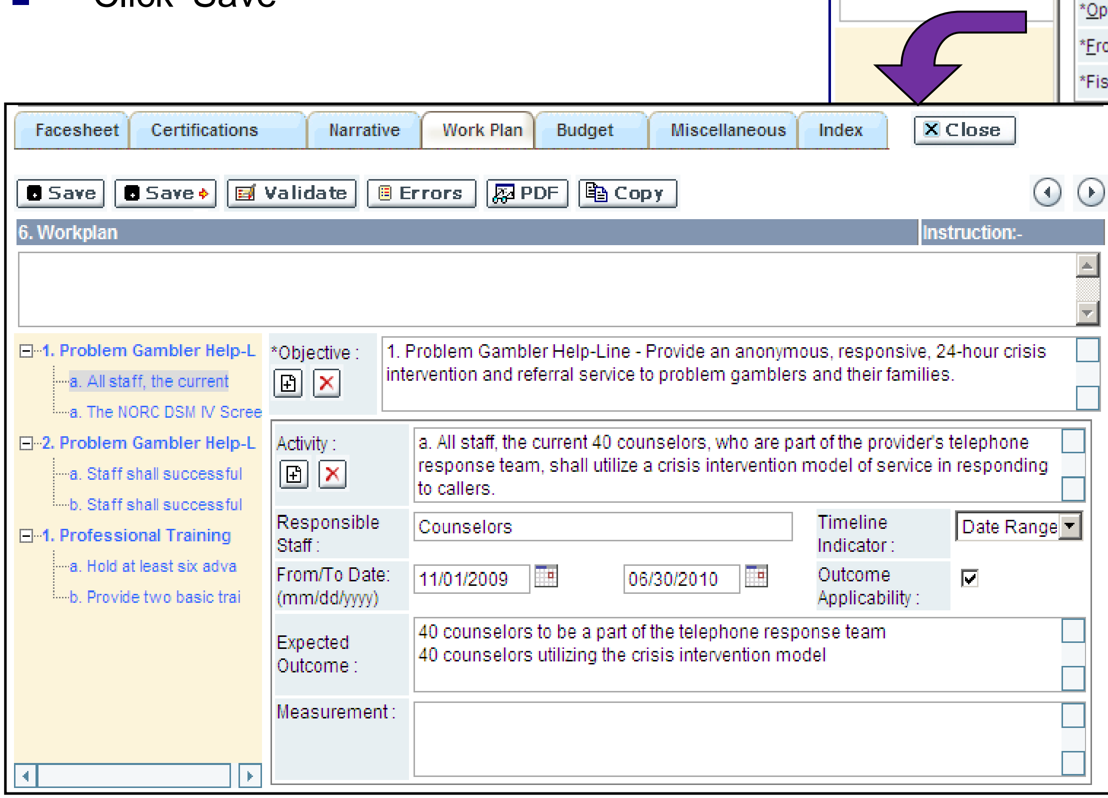


Action Buttons – Copy Function

Complete the Copy process by following these steps:

- ‘Work Plan records copied successfully’ Click ‘OK’
- Click ‘Close’ on the ‘Copy information from another application’ pop-up window. The system will refresh, and the copied section will appear.
- Edit the copied section as needed
- Click ‘Save’





***NOTE:** The ‘Copy’ button function can be used on any section of the grant application, but we recommend you use this function for the Narrative, Work Plan and Budget sections <u>only</u>.*

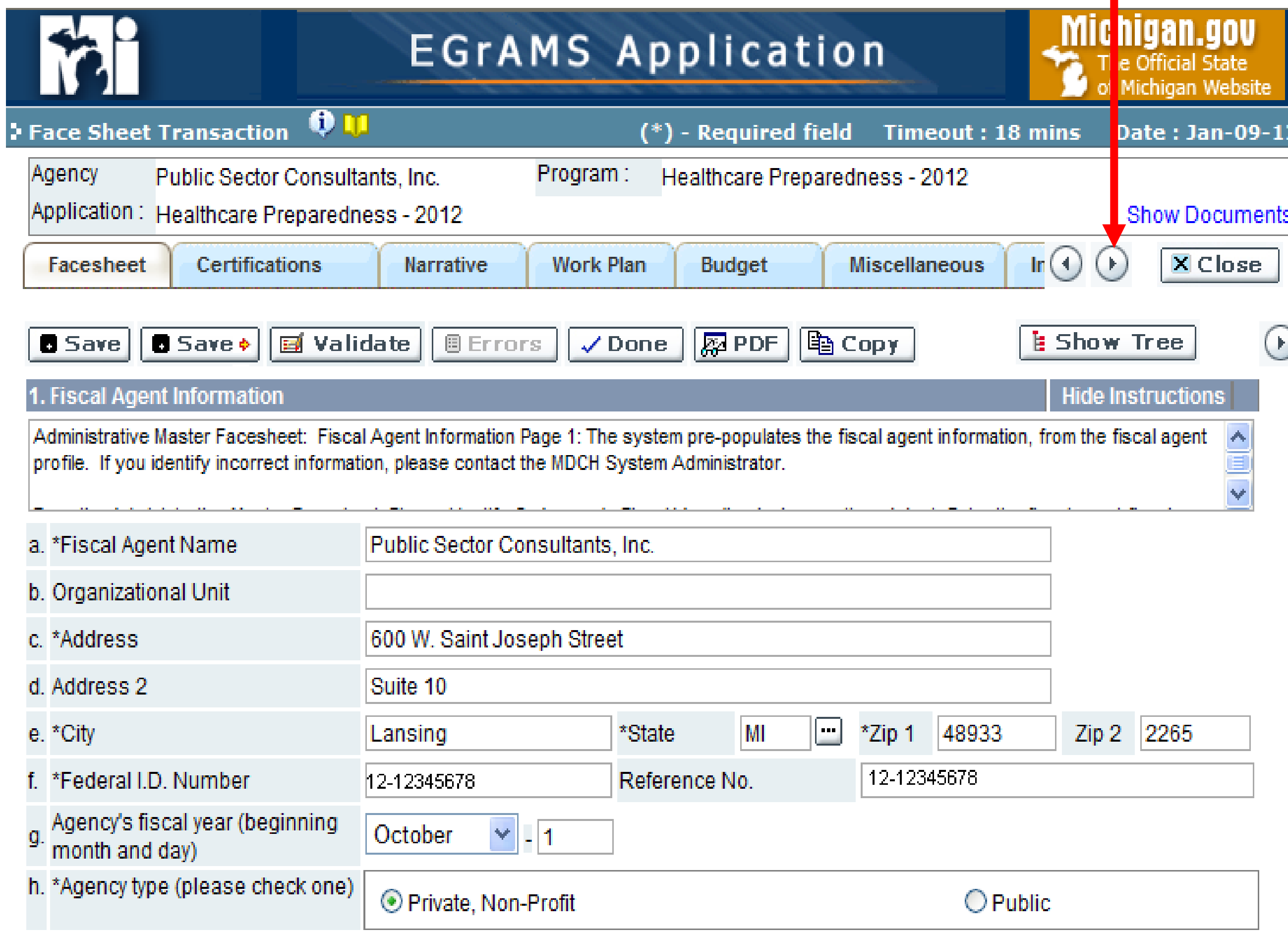
Application Entry – Facesheet

The application facesheet contain general contact information, program allocation amount and the agencies key contacts for the program.

*Click the arrows to move forward or backward in the application

1. Fiscal Agent Information

- EGrAMS pre-populates the fiscal agent information. This information is pulled from the grantee agency profile.
- Choose the Agency Fiscal Year beginning Month & enter the Day.
- If the information on the Fiscal Agent Information screen is incorrect, contact the EGrAMS helpdesk.

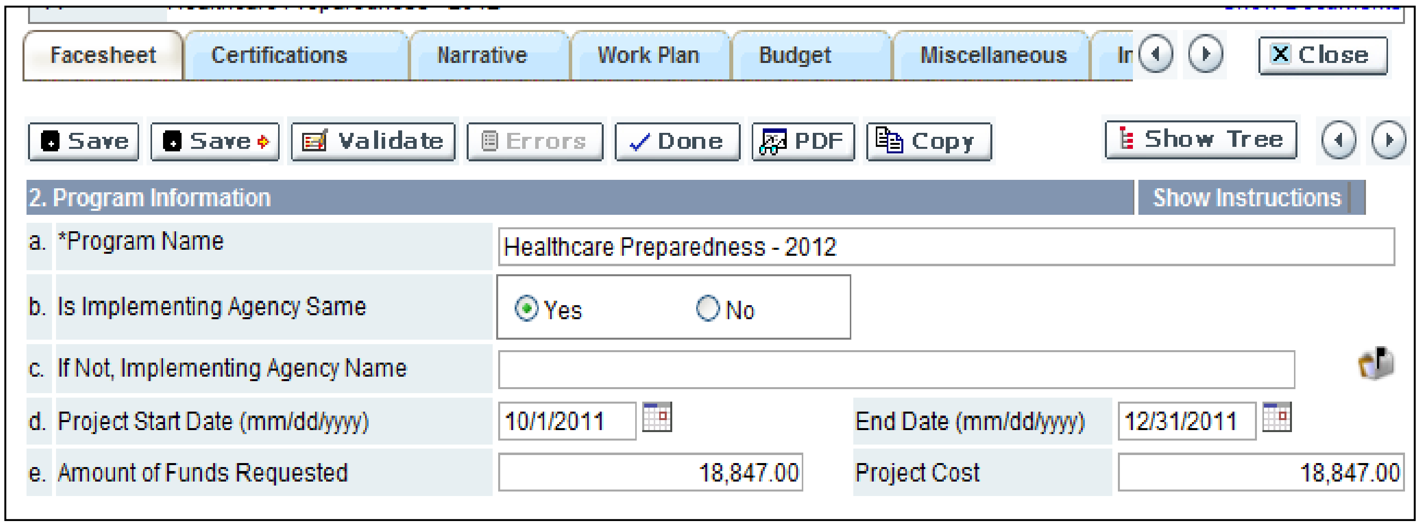


Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Application Entry – Facesheet

2. Program Information

- EGrAMS pre-populates; program name, project start/ end date, amount of funds requested and project cost amount. **Verify the information is correct.**
- ***NOTE:*** Amount of Funds Requested and Project Cost textboxes are pre-populated with the Agency Allocation amount.



- If the information on the Program Information screen is incorrect, contact the EGrAMS Helpdesk for assistance.

Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

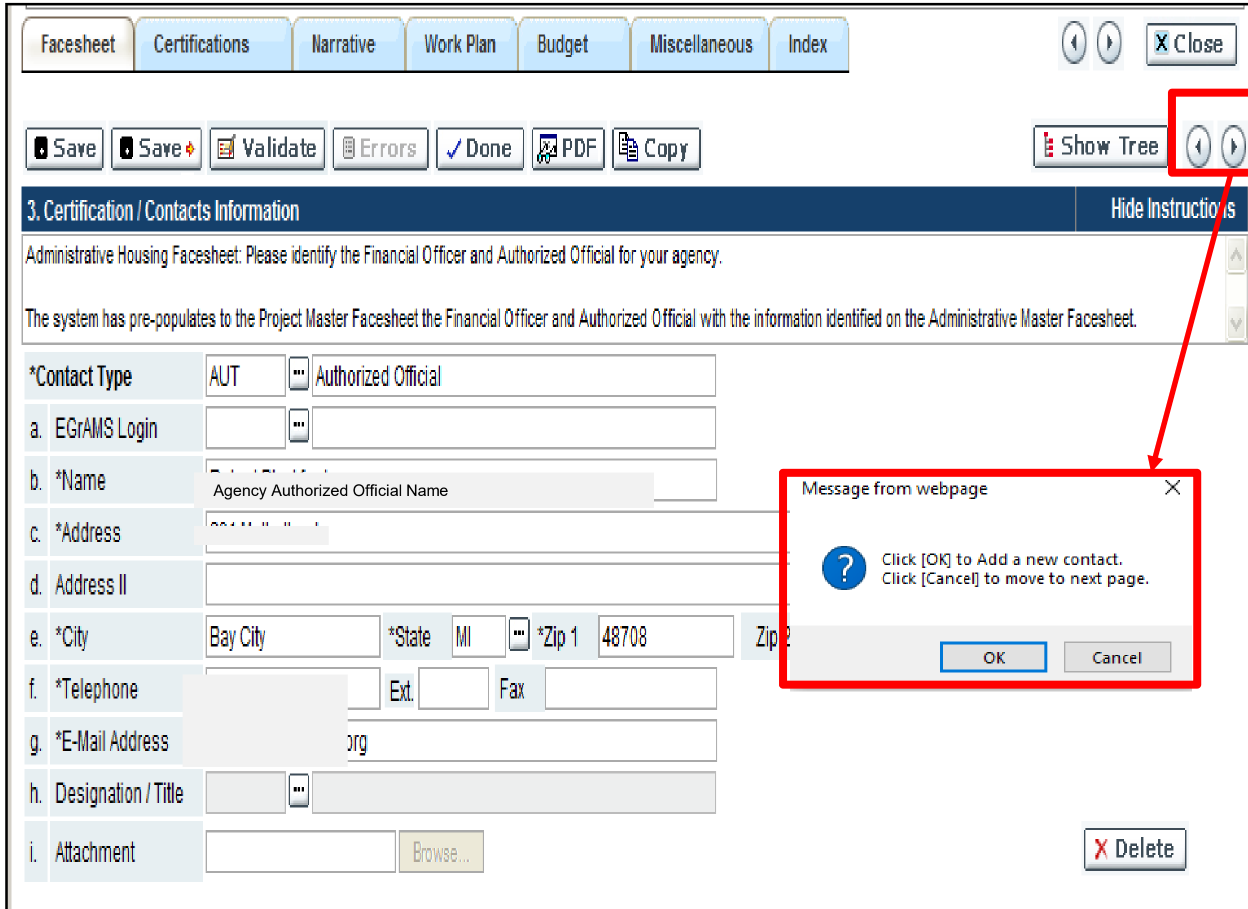
Application Entry – Facesheet

3. Certification/Contacts Information

A Project Director, Financial Officer, and Authorized Official must be identified for each application during this process.

To add required Project Contacts:

- Select Contact Type, using the 'Lookup' icon.
- Select EGrAMS Login, using the 'Lookup' icon. Check the box next to the name of the contact.
- Remaining information will automatically populate.
- Click the 'Save' button to save the information. Upon saving, the system will bring up a blank Contact Information screen. When done, click on the 'Certifications tab'.
- **To add another user**: Click the right arrow



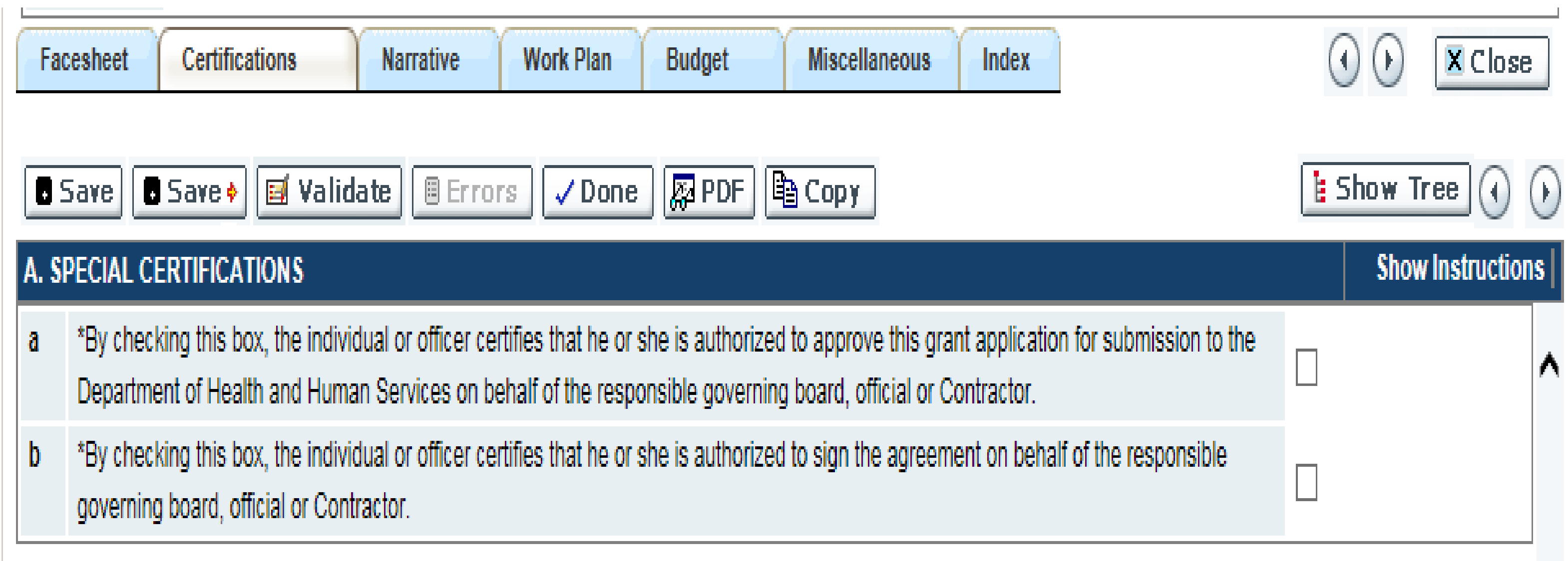
NOTE: If a User is <u>not</u> listed on the 'Lookup' menu, contact the EGrAMS Helpdesk for assistance (517-335-3359).
Do <u>NOT</u> add Users manually.

Application Entry - Certifications

All applications contain the Special Certification section. Additional certification statements unique to the individual programs may also be displayed.

Read and confirm the 'Special Certifications' statements as shown.

- A marked check box is treated as 'Yes',
- **Unmarked check boxes are treated as 'No' and will result in validation errors.**



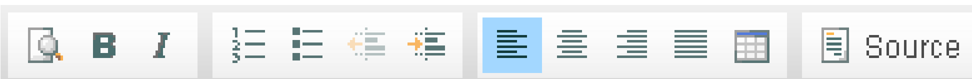
Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Application Entry - Narrative

The application Narrative contains requirements related to the program service area.

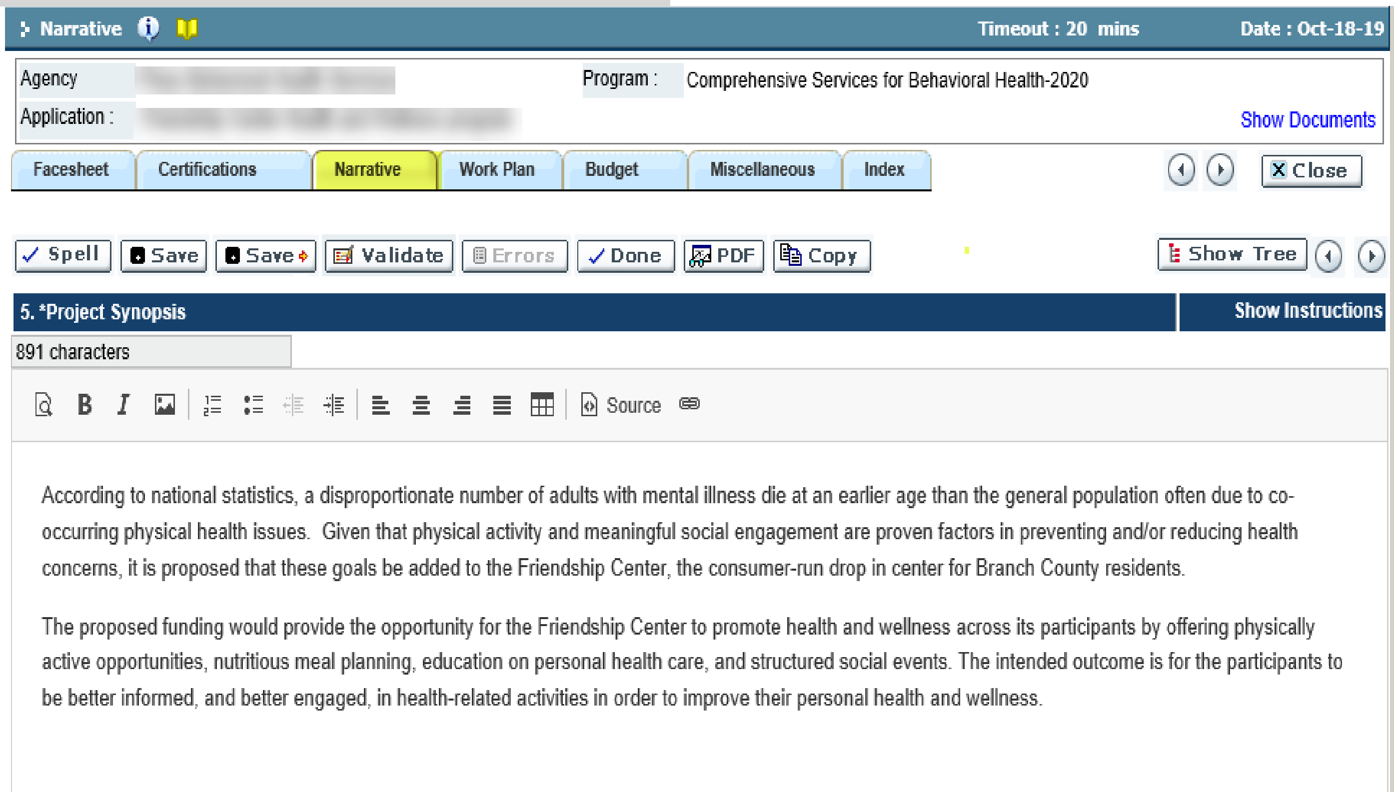
5. Program Synopsis

- Type (or cut and paste from a Word doc.) the program synopsis into the provided textbox.
- Please proofread as formatting may have changed between outside document and EGrAMS
- Use the optional Toolbar buttons to format the synopsis entry.



Do NOT try to insert graphics into text boxes

Use the 'Save' button to save the information. **Save Often**



Application Entry - Narrative

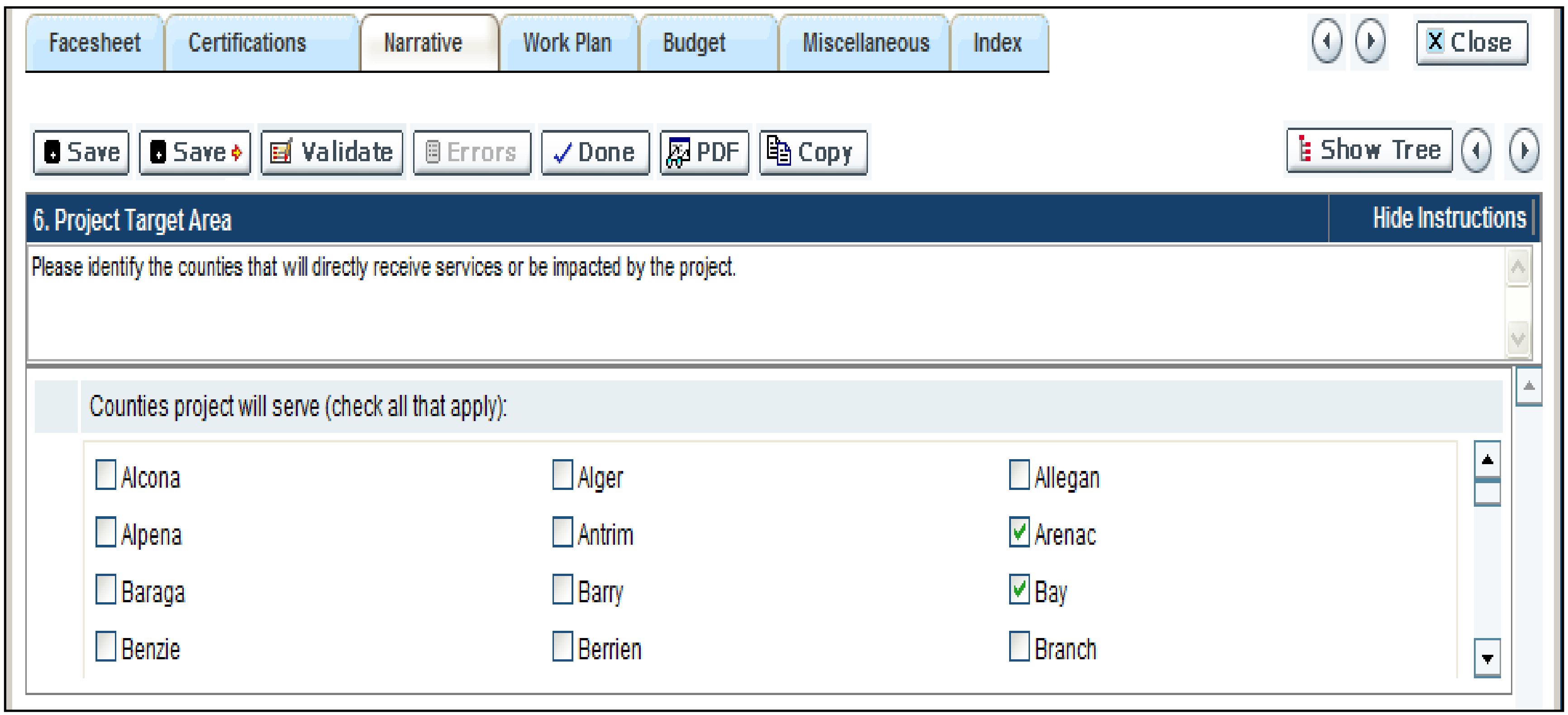
6. Program Target Area

- Check **all** counties or areas on the list that are included in the service delivery area.

Click the ‘Save’ button to save the information.

Click ‘Save’ button to save changes or ‘Save->’ button to save and advance to the next screen.

NOTE: Do not check every box – there are 84 choices on this list – selecting all 83 counties plus 1 (out Wayne) will result in a validation error.



Application Entry – Work Plan

The Application Work Plan contains Objective and Activity information, which are the Statement of Work included in the Agreement.

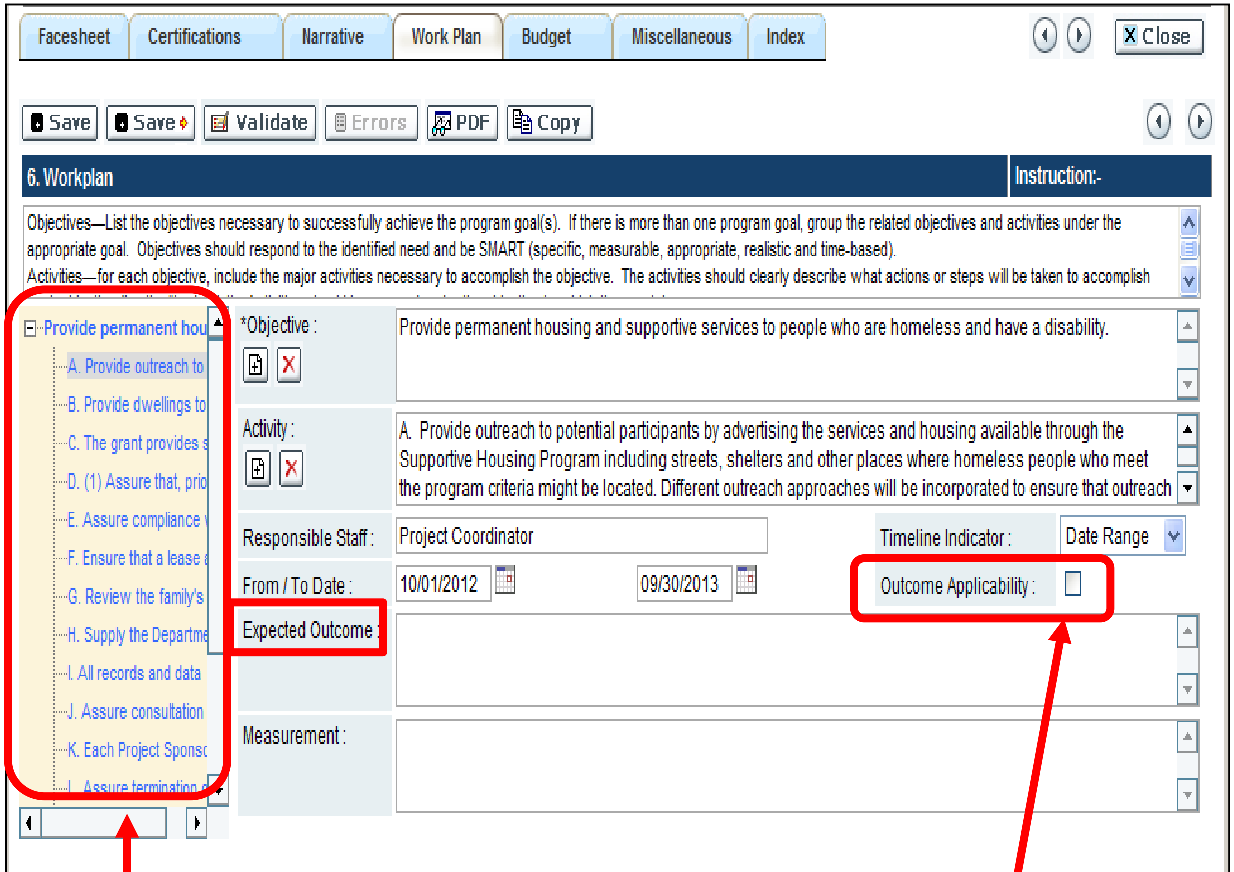
Objective: Enter an Objective in the textbox provided.

Activity: Enter an activity associated to that Objective in the textbox provided.

Responsible Staff: Enter responsible person/party for this activity.

Timeline Indicator: Select Date Range or Date using the dropdown.

- **Date Range** (default): Enter the timeframe using the Calendar Lookup.
- **Date:** Use this option to enter the date using the Calendar Lookup



Expected Outcomes: Enter the expected outcome for this Activity.

Measurements: Enter the measurement that will be used to indicate that the outcome has been achieved.

If the reporting of 'Expected Outcomes' is required, check the Outcome Applicability box and proceed to Expected Outcomes and Measurement textboxes.

System displays all Objectives and Activities entered in a tree structure.

Application Entry – Work Plan

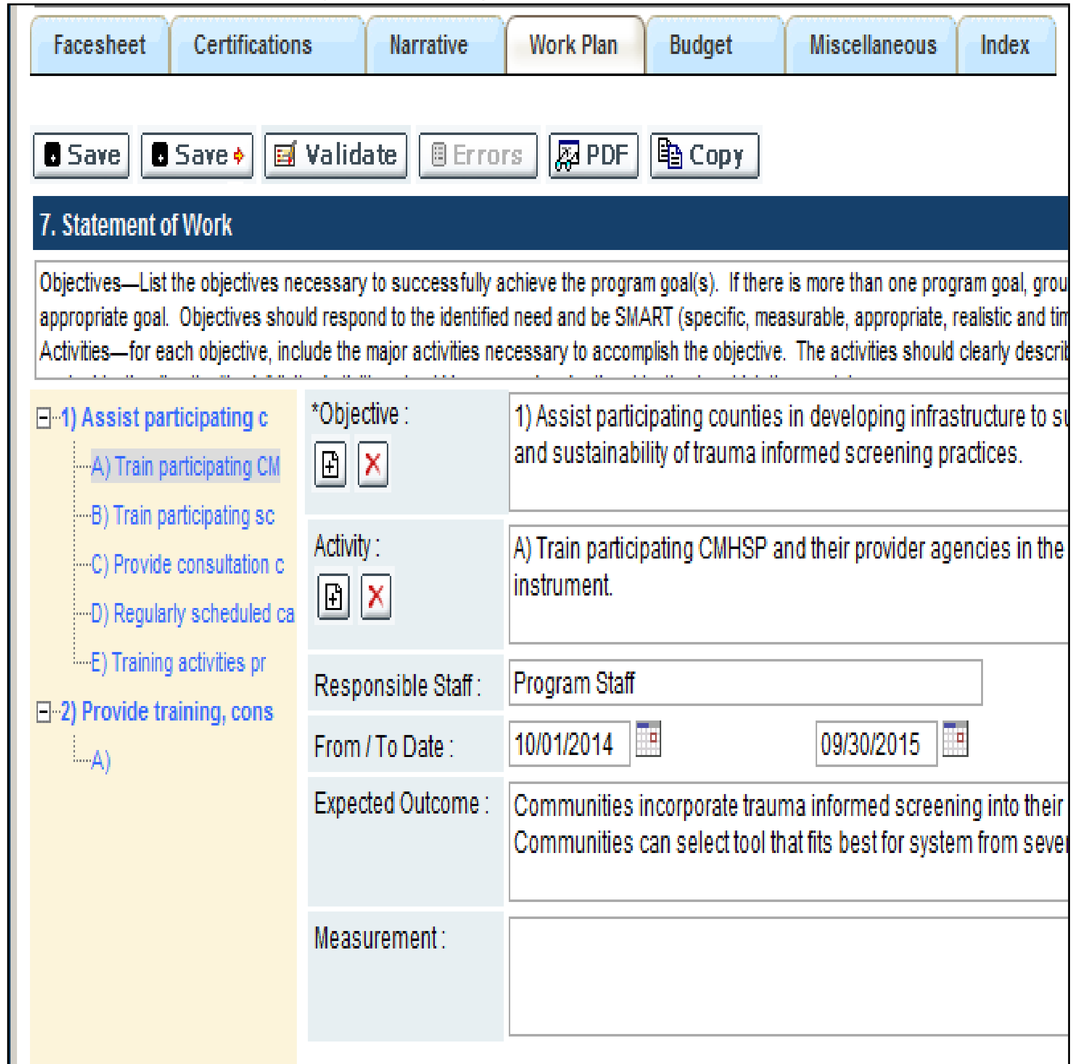
Entering multiple activities and objectives

- The User can enter multiple activities to the work plan by following these steps:
  - **Objective:** Click on the add icon. Enter a new Objective in the textbox.
  - **Activity:** Click on the add icon. Enter a new Activity for that Objective.
  - Click 'Save' after each newly entered Objective and Activity.
  - Repeat this process for each additional Objective and Activity.

  NOTE: *Use an alpha-numeric system and refer to the tree for easier tracking of Objectives and Activities*

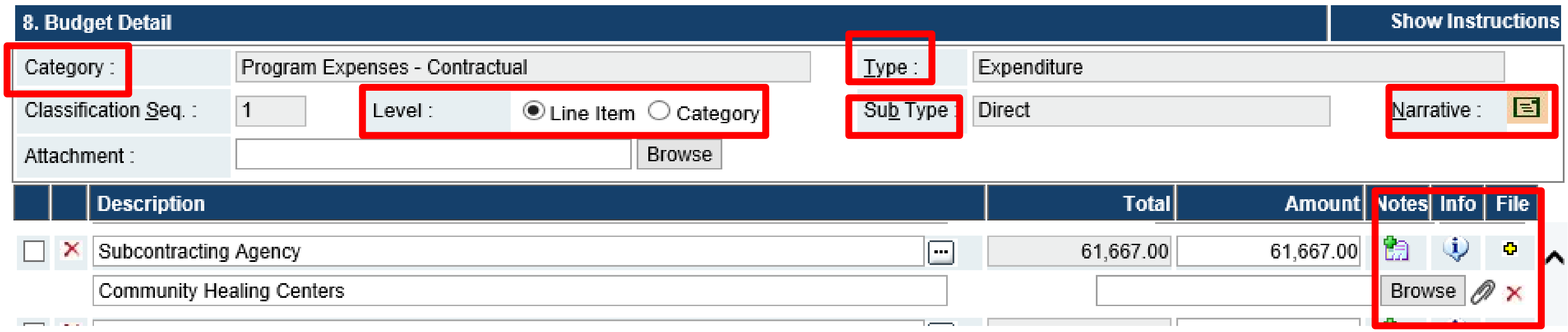
- To delete an Activity associated with an Objective, follow these steps:
  - Activity: Click on the Delete Icon. The system will pop-up and confirmation message asking "Do you wish to delete this Activity?"
  - Click 'OK' to delete.
  - Click 'Cancel' to discard request.

  NOTE: *All Activities associated with the Objective need to be deleted first prior to deleting an Objective.*



Questions?

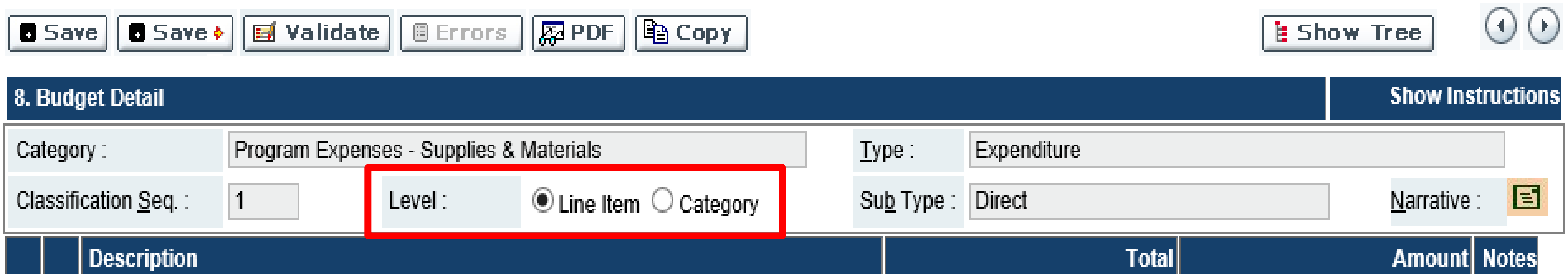
Application Entry – Budget Navigation



- **Category**: Displays the name of the Budget Category currently open
- **Type**: Shows the budget type as either Expenditure or Source of Funds
- **Sub Type**: Shows the applicant the type of Expenditure as wither Direct or Indirect
- **Narrative**: Memo field for recording budget narrative descriptions
- **Info Icon:** Budget Contact Information Setup, enter only one contact per line item. Enter the Name and Address of the subcontractor or subrecipients in the Budget Contact Information Setup pop-up window – required.
- **File Icon**: Allows the applicant to upload a file, if applicable. **Uploaded statements of work are required for subcontracts budgeted at or above $50,000**.
- **Delete Icon:** Allows the applicant to delete attached documentation from a line item.
- **Paper Clip Icon:** Allows for the ability to view the attached documentation.
- **Note Icon:** Allows application to add any notes
- **Level:** Allows applicant to select 'Line item' or 'Category' (only available on Program Expenses – Travel, Supplies & Materials, & Other Expenses sections)

Application Entry – Budget Navigation

Changing **Level** is **ONLY** available in the Travel, Supplies & Materials, and Other Expense sections.



- **Choose 'Line Item':** when expenses in this budget category **equals 10% or more of the total budget.**

- **Choose 'Budget Category':** when budget category **equals less than 10% of the total budget.**

Changing the Level from "Line Item" to "Category"

- **Important to Remember:** Changing the category budget level from a 'Line Item' to a 'Category' will <u>delete</u> existing entries, for this entry.

NOTE: *Grantee cannot enter multiple line items when budget category screen is set to 'Category.'*

Application Entry – Budget Salary & Wages

Description: Use the 'Look up' to select the position title. If position not available, select 'Other' and type the position title in the space provided.

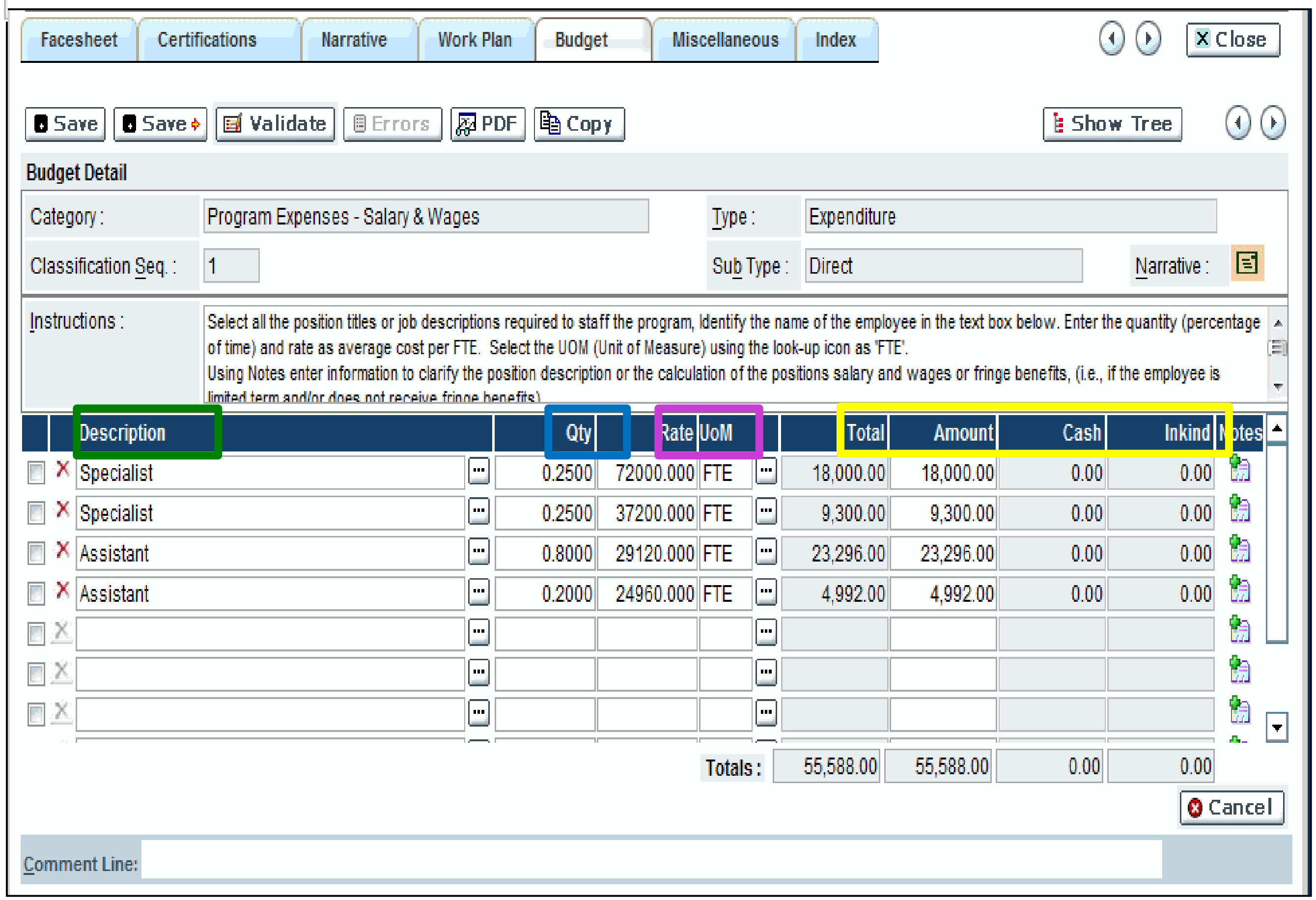
Qty: Enter the number of positions

Rate: Enter the total salary cost based on 1 FTE.

Unit of Measure (UoM): Select FTE (i.e. full-time employee or full-time equivalent) for unit of measure for each position description.

Total Column: Will automatically calculate (Qty X Rate = Total). Grantee must enter amounts in the 'Amount' or 'Cash' column

Note: Amounts in **Amount, Cash & In-kind** columns **MUST** equal the amount in the **Total** column, if they don't this will result in an error



Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Example: The Grantee selects Specialist for the title. **Quantity (QTY)** was expressed as a decimal (FTE) of .25. **Rate:** The Grantee entered the total salary cost for this position description ($72,000). **UoM:** The Grantee selected FTE (full-time employee or full-time equivalent). **Total:** .25 X $72,000 = $18,000

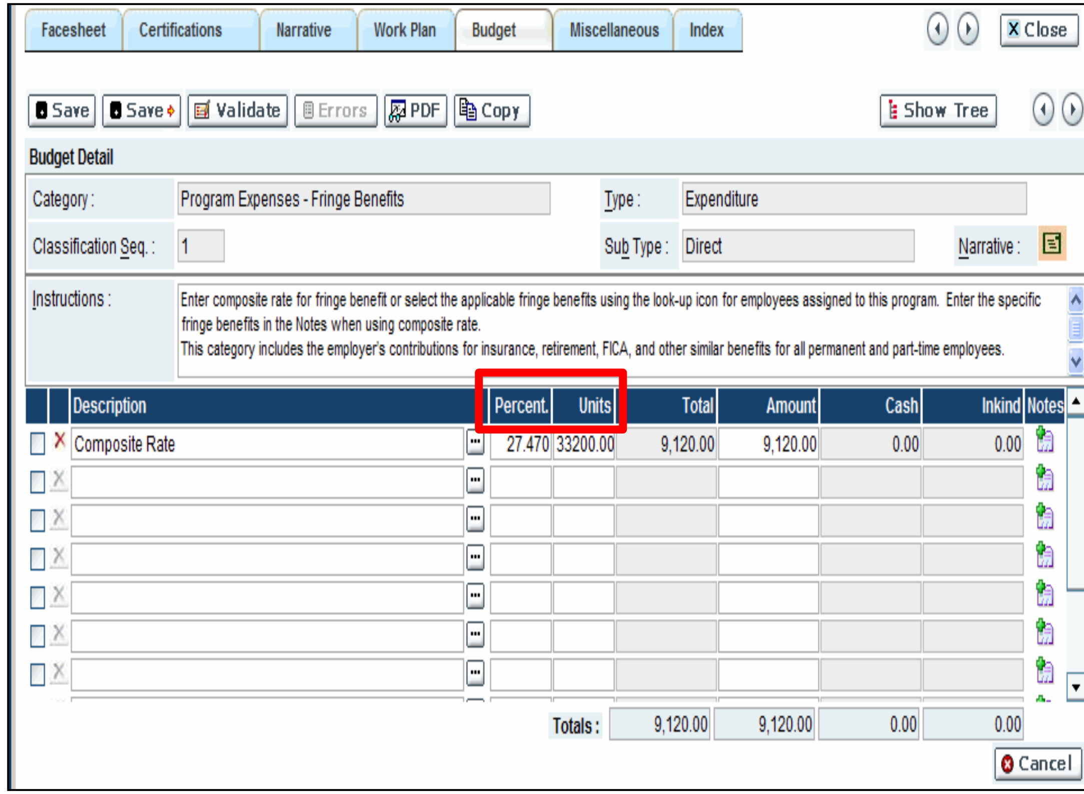
Application Entry – Budget Fringe Benefits

Fringe Benefits can be entered three different ways:

- List each individual Fringe Benefit
- **Composite Rate** – **MUST** identity the benefits by using listing the benefits included using the Notes icon
- **All Composite Rate** – Does not require notes, as this implies that all fringes are provided.

Percent: Enter the percentage of the specific fringe benefits

Unit: The system will pre-populate the Salary & Wage total. (If changes are made in Salary & Wages after entering the fringe benefits, verify that the units reflect the correct Salary & Wages total.)



Total Column: Will automatically calculate (Percent X Units = Total). Grantee must enter amounts in the "Amount" or "Cash" column

Note: Amounts in **Amount, Cash & In-kind** columns **MUST** equal the amount in the **Total** column, if they don't this will result in an error

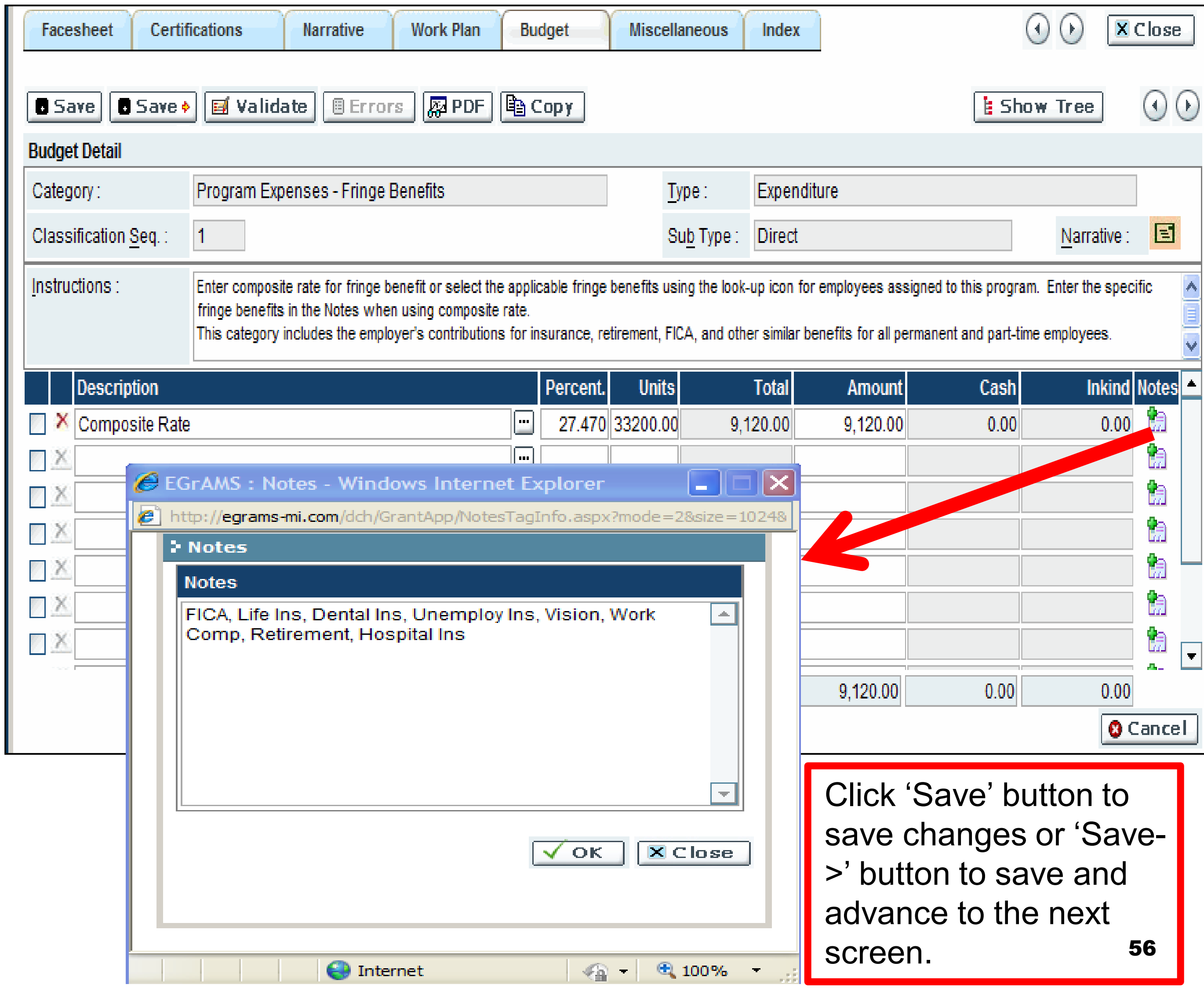
Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Application Entry – Budget Fringe Benefits

Composite Rate

- **MUST** enter a note listing out the fringe benefits that is included in this rate
- If no note is included, this will result in the application be sent back for corrections or opened for an amendment

NOTE: Make sure percent is reasonable. If percent is 100%, this may be questioned



Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

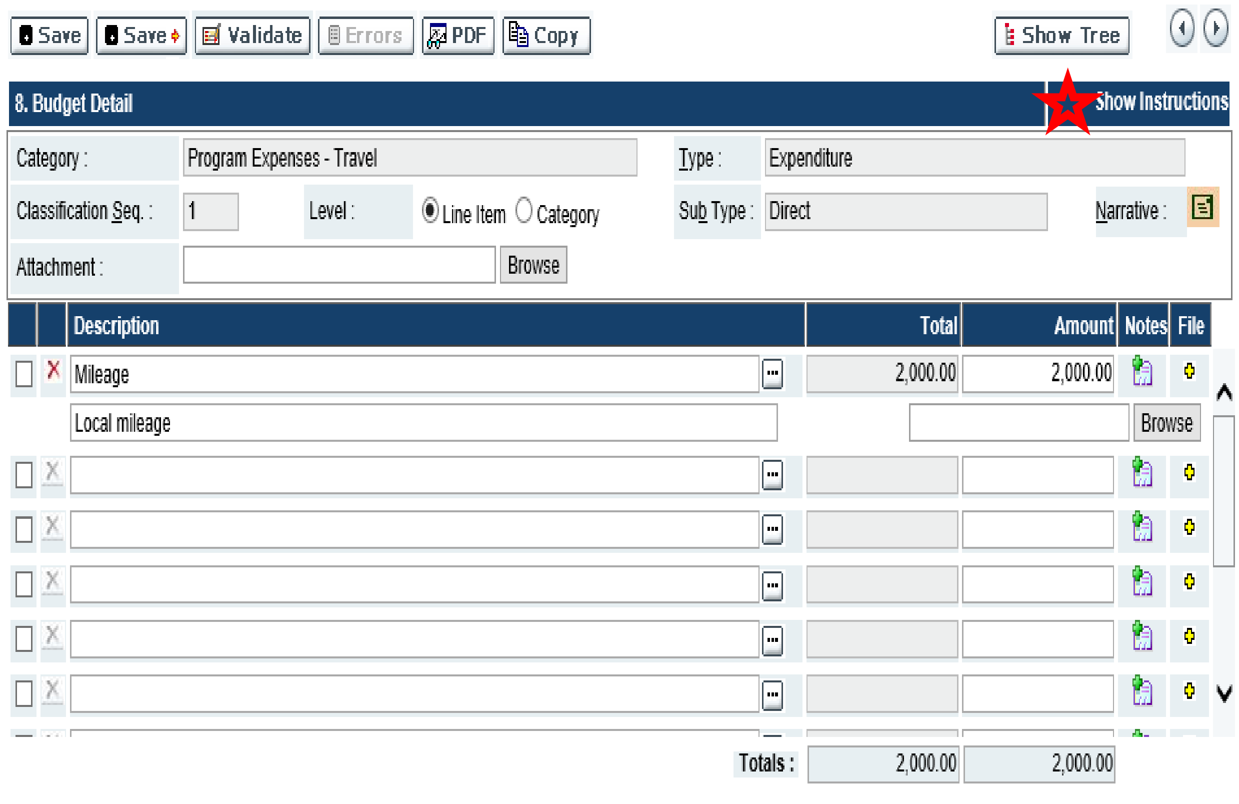
Application Entry – Budget Travel

Level: Select 'Line item' or 'Category' (refer to slide 50)

Description: Using the 'Lookup' icon, select travel description. If travel expense not available, select 'Other' and type in name of the travel expense.

Amount: Enter the total amount of the travel expenses

Notes: Enter clarifying information (i.e., if the employee reimbursement for mileage 800 miles @ $0.42 a mile).



Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Click 'Show Instructions' for Detailed Instructions

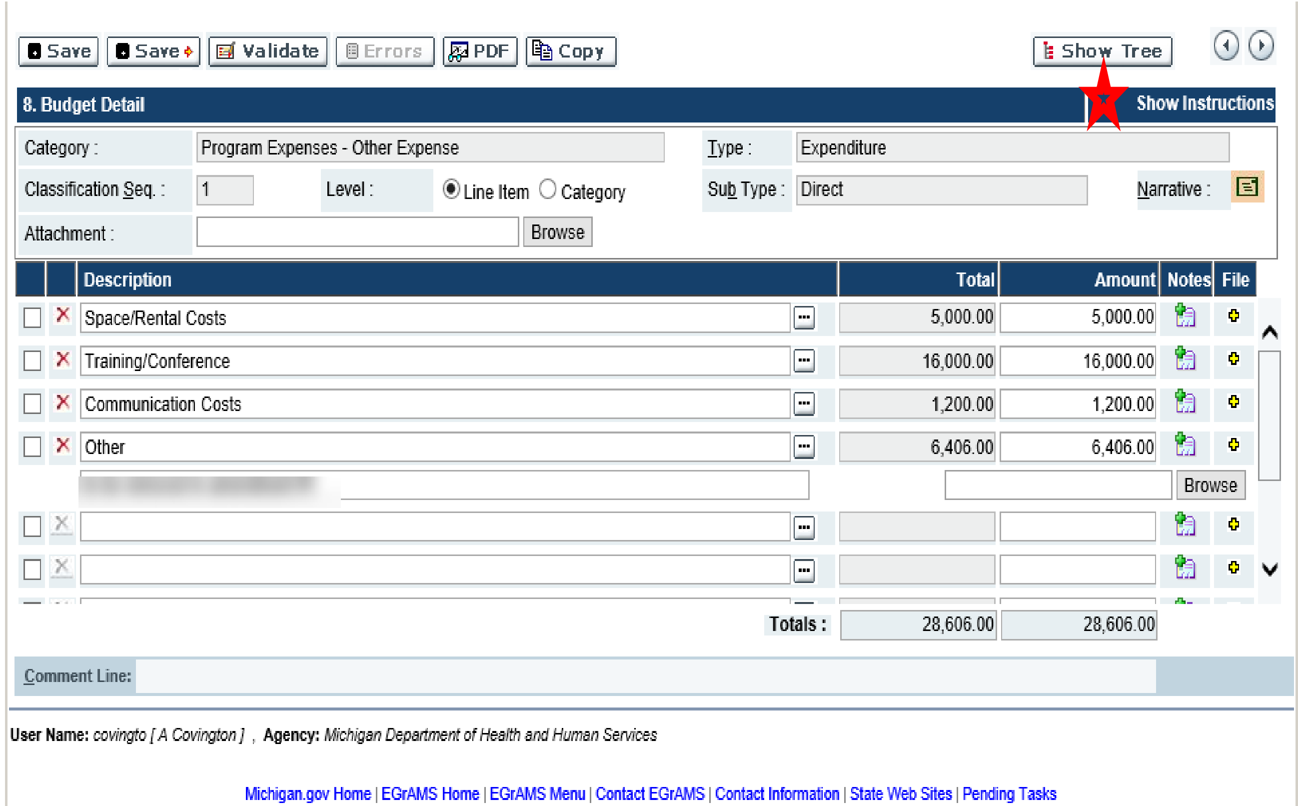
Application Entry – Budget Supplies & Materials, Equipment & Other Expenses

Level: Select 'Line item' or 'Category' (refer to slide 50)

Description: Using the 'Lookup' icon, select adequate description. If an adequate description is not available, select 'Other' and type in the contractual service description.

Amount: Enter the total amount of the expenses

Notes: Enter clarifying information.



Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Click 'Show Instructions' for Detailed Instructions

Application Entry – Budget Contractual

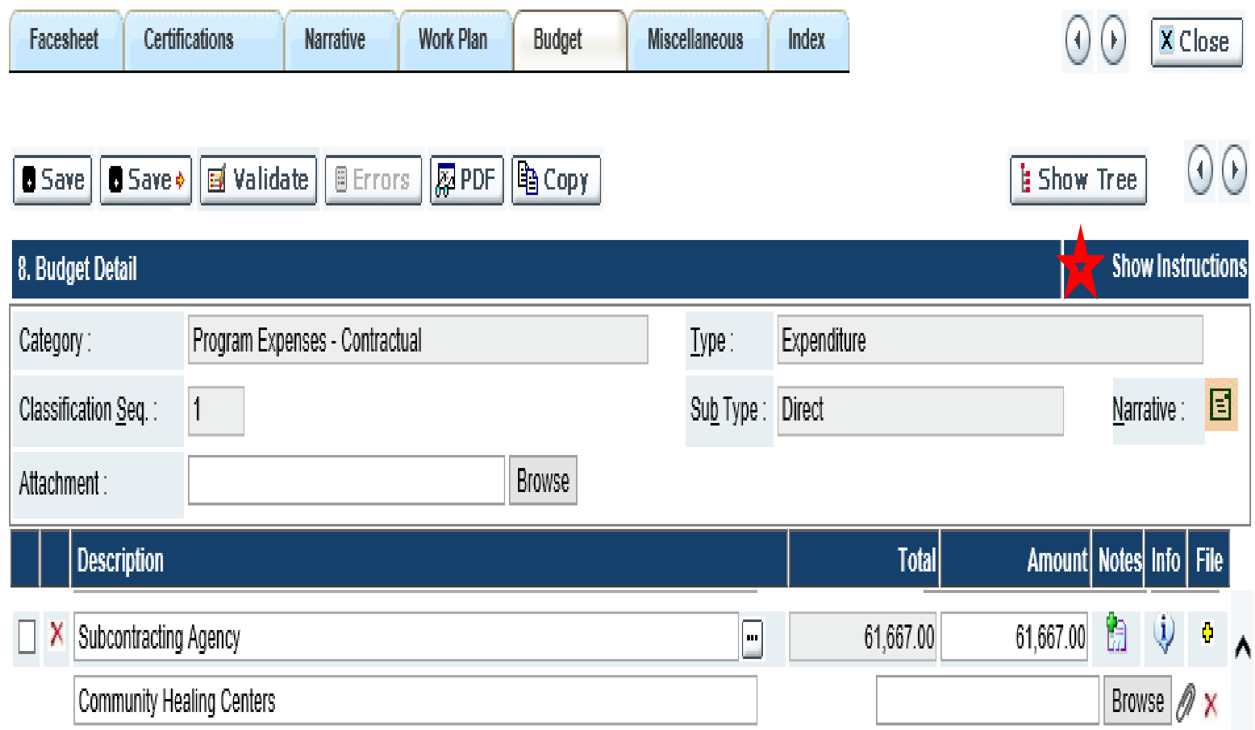
Description: Using the 'Lookup' icon select the contractual service description. Enter the name of the contractual expense in the textbox that appears below the line item. If an adequate description is not available, select 'Other' and type in the contractual service description.

Amount: Enter the total amount each subcontractor/subrecipient.

Notes: Enter clarifying information

Info: Enter the subcontractor's/subrecipient's address information related to the contractual expense.

File Icon: If subcontracting agency is over $50,000, must attach a statement of work



Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Click 'Show Instructions' for Detailed Instructions

Application Entry – Budget Indirect Costs

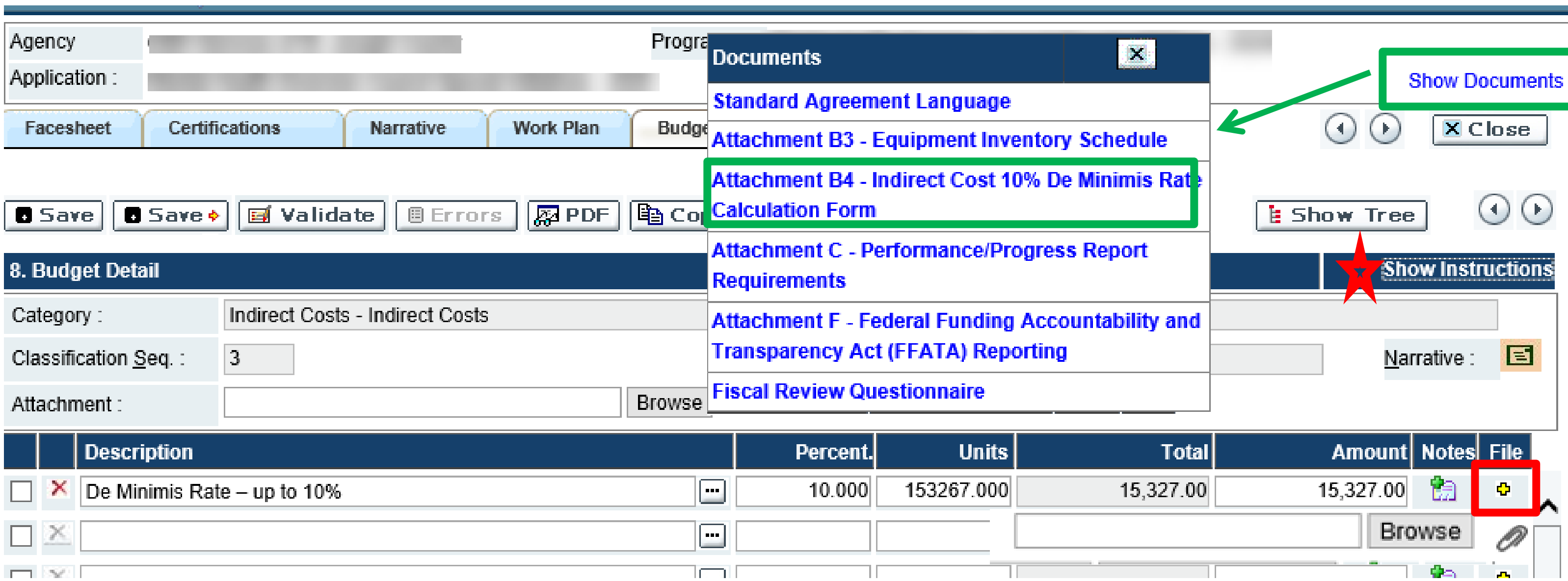
Record Count : 4 Page 1 of 1

	Code	Description
	IR1FED	Federal Approval
	IR2STA	State Approval
	IR3OTH	Other Approval
	IR4DMR	De Minimis Rate – up to 10%

- **Federal Approval** – Need to attach the Federal approved letter
- **State Approval –** Need to attach documentation for approved rate (i.e. Michigan Department of Education)
- **Other Approval –** Need to attach adequate documentation
- **De Minimis Rate – up to 10% -** Need to attach B.4 form found in ‘show documents’

Application Entry – Budget Indirect Costs

No matter what Indirect rate you choose, you MUST attach the adequate documentation



To attach backup: Click the file icon, and select your file to attach

De Minimis Rate Attachment B4 – Click on 'Show Documents' and select the form. Fill out the form and then attach the document to the application

Click 'Show Instructions' for Detailed Instructions

Application Entry - Budget Summary

Description: Lists the budget expenses categories.

- Click on the expenses category name to go to a specific budget category page to edit.

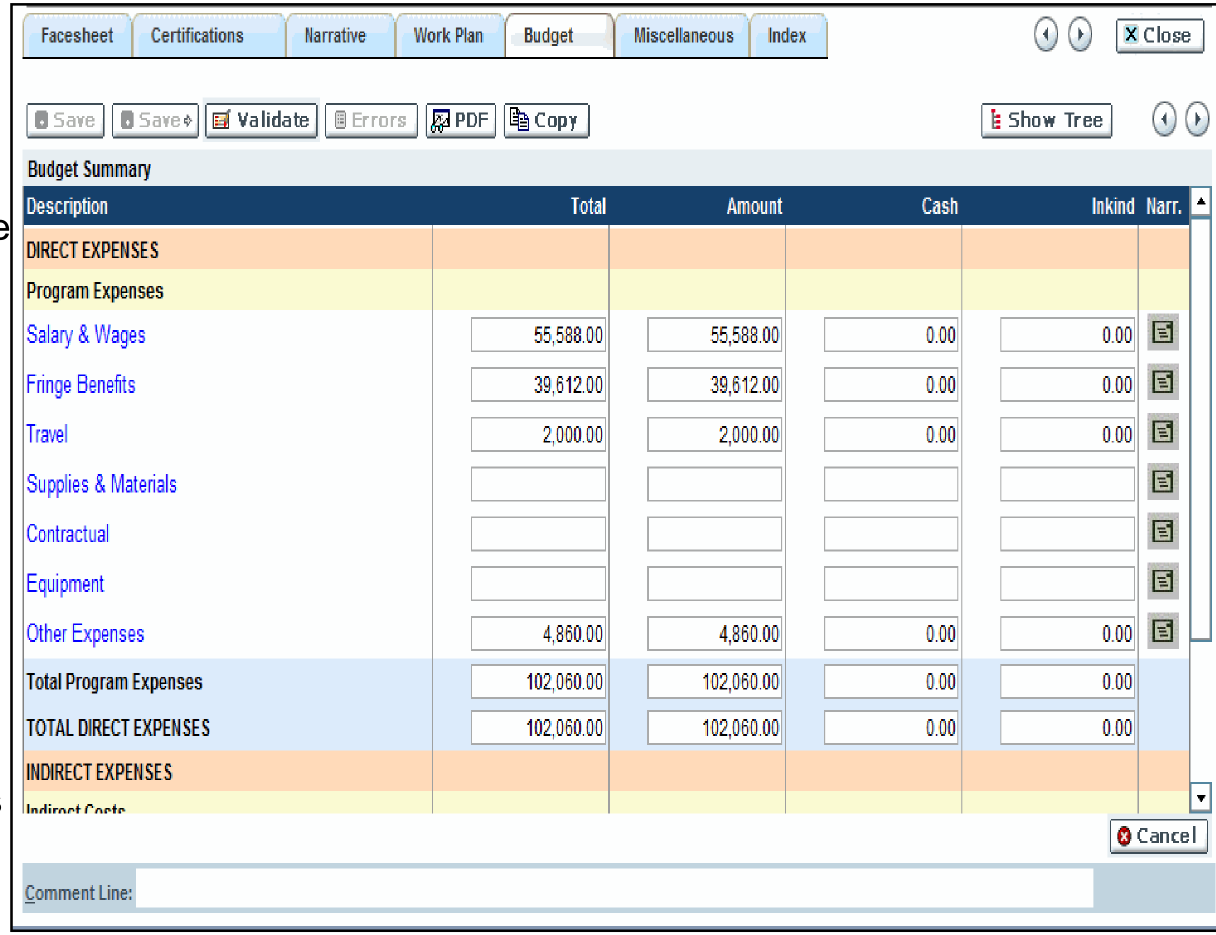
Total: View the total amount of funds associated to a budget category.

Amount: View the summarized state amount of funds associated to a budget category.

Cash and In-kind: Are reported in the Source of Fund section of the budget.

Narrative Icon: To view the expenses category narrative. This information is entered at the budget detail level, if required.

- If no narrative has been entered for the respective expense category, the icon is disabled.



Description	Total	Amount	Cash	Inkind	Narr.
DIRECT EXPENSES					
Program Expenses					
Salary & Wages	55,588.00	55,588.00	0.00	0.00	
Fringe Benefits	39,612.00	39,612.00	0.00	0.00	
Travel	2,000.00	2,000.00	0.00	0.00	
Supplies & Materials					
Contractual					
Equipment					
Other Expenses	4,860.00	4,860.00	0.00	0.00	
Total Program Expenses	102,060.00	102,060.00	0.00	0.00	
TOTAL DIRECT EXPENSES	102,060.00	102,060.00	0.00	0.00	
INDIRECT EXPENSES					
Indirect Costs					

Grantee can click on the blue hyperlinks to move back to individual budget categories to make corrections.

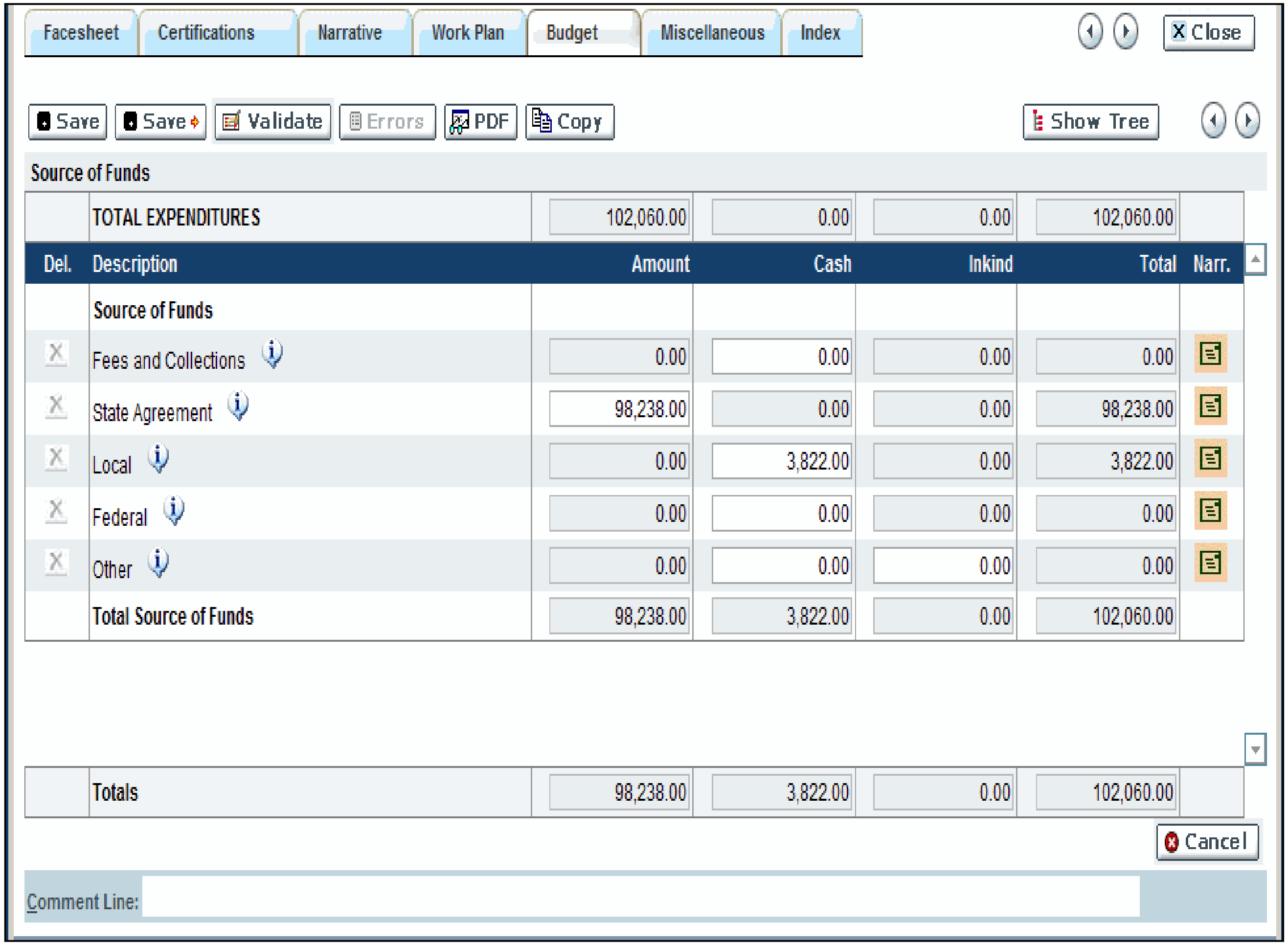
Application Entry – Budget Source of Funds

Source of Funds – Refers to the various funding sources that are used to support the program. Funds used to support the program should be recorded in this section according to the following categories:

Total Expenditures – Pre-populated from the Budget Detail.

Fees and Collections – Enter the total fees and collections estimated (represent funds that the program earns through it operation and retains for operation purposes). This included fees for services, payments by third parties (insurance, patient collections, Medicaid, etc.) and any other collections.

State Agreement – Enter the amount of MDHHS funding allocated for support of this program (including all state and federal funds received by the Department that are to be awarded to the Grantee through the Agreement)



	TOTAL EXPENDITURES	102,060.00	0.00	0.00	102,060.00	
Del.	Description	Amount	Cash	Inkind	Total	Narr.
	Source of Funds					
X	Fees and Collections	0.00	0.00	0.00	0.00	
X	State Agreement	98,238.00	0.00	0.00	98,238.00	
X	Local	0.00	3,822.00	0.00	3,822.00	
X	Federal	0.00	0.00	0.00	0.00	
X	Other	0.00	0.00	0.00	0.00	
	Total Source of Funds	98,238.00	3,822.00	0.00	102,060.00	
	Totals	98,238.00	3,822.00	0.00	102,060.00	

Quick Links

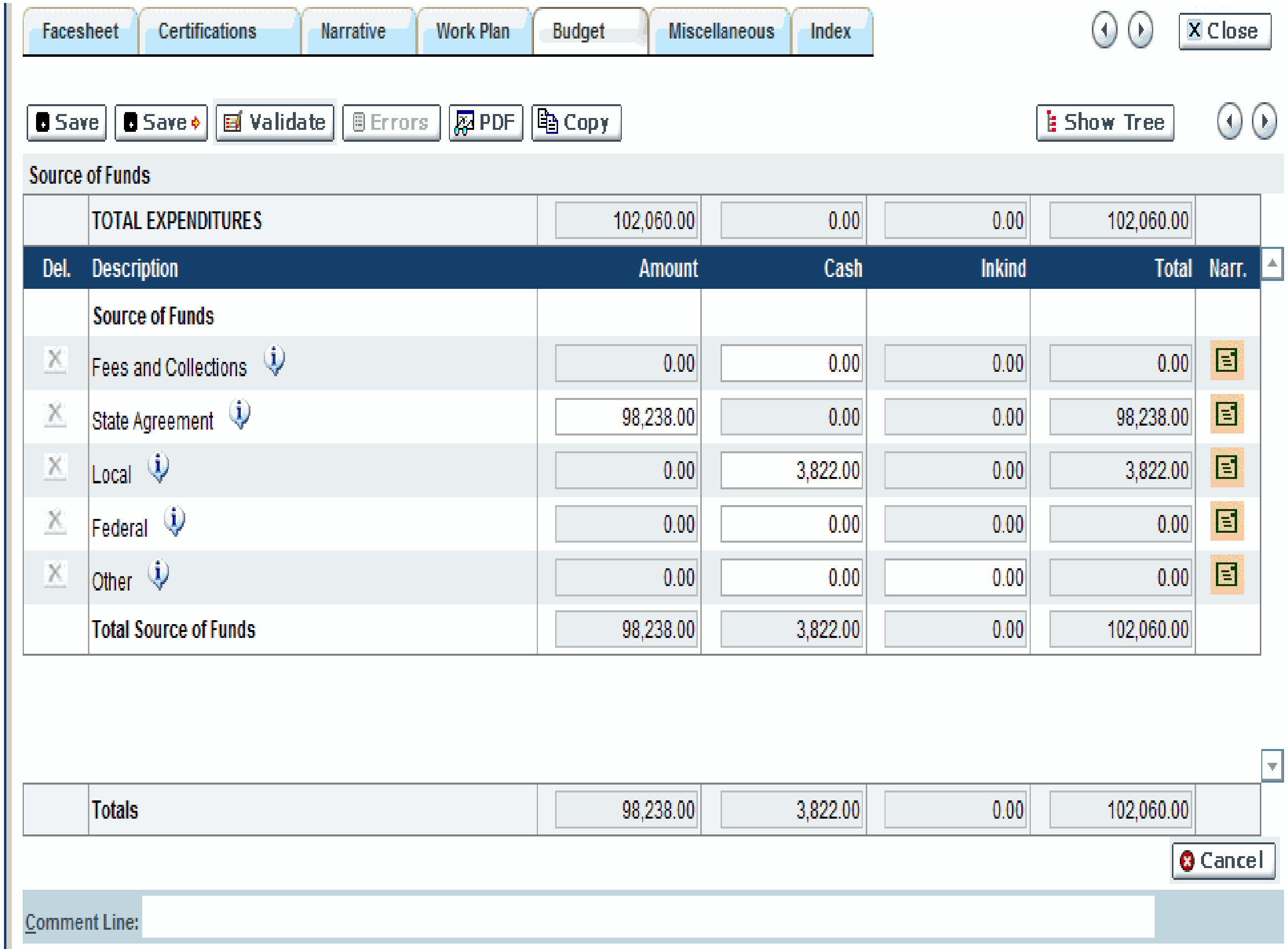
Application Entry – Budget Source of Funds

Local – Enter the amount of Contractor funds utilized for support of this program. In-kind and donated services for other agencies/sources should not be included on this line.

Federal – Enter the amount of any Federal grants received directly by the Grantee in support of this program and identify the type of grant received in the space provided

Others – Enter and identify the amount of any other funding received. Other funding could consist of foundation grants, United Way grants, private donations, fund-raising, charitable contributions, etc. In-kind and other donated services should not be included unless specifically requested by MDHHS.

Total Source of Funds – The system automatically calculated the total amount. Amount, Cash and In-Kind columns needs to match total.



Del.	Description	Amount	Cash	Inkind	Total	Narr.
	TOTAL EXPENDITURES	102,060.00	0.00	0.00	102,060.00	
	Source of Funds					
X	Fees and Collections	0.00	0.00	0.00	0.00	
X	State Agreement	98,238.00	0.00	0.00	98,238.00	
X	Local	0.00	3,822.00	0.00	3,822.00	
X	Federal	0.00	0.00	0.00	0.00	
X	Other	0.00	0.00	0.00	0.00	
	Total Source of Funds	98,238.00	3,822.00	0.00	102,060.00	
	Totals	98,238.00	3,822.00	0.00	102,060.00	

Click 'Save' button to save changes or 'Save->' button to save and advance to the next screen.

Application Entry - Miscellaneous

This section allows the Grantee to add supporting documentation as an attachment, if required.

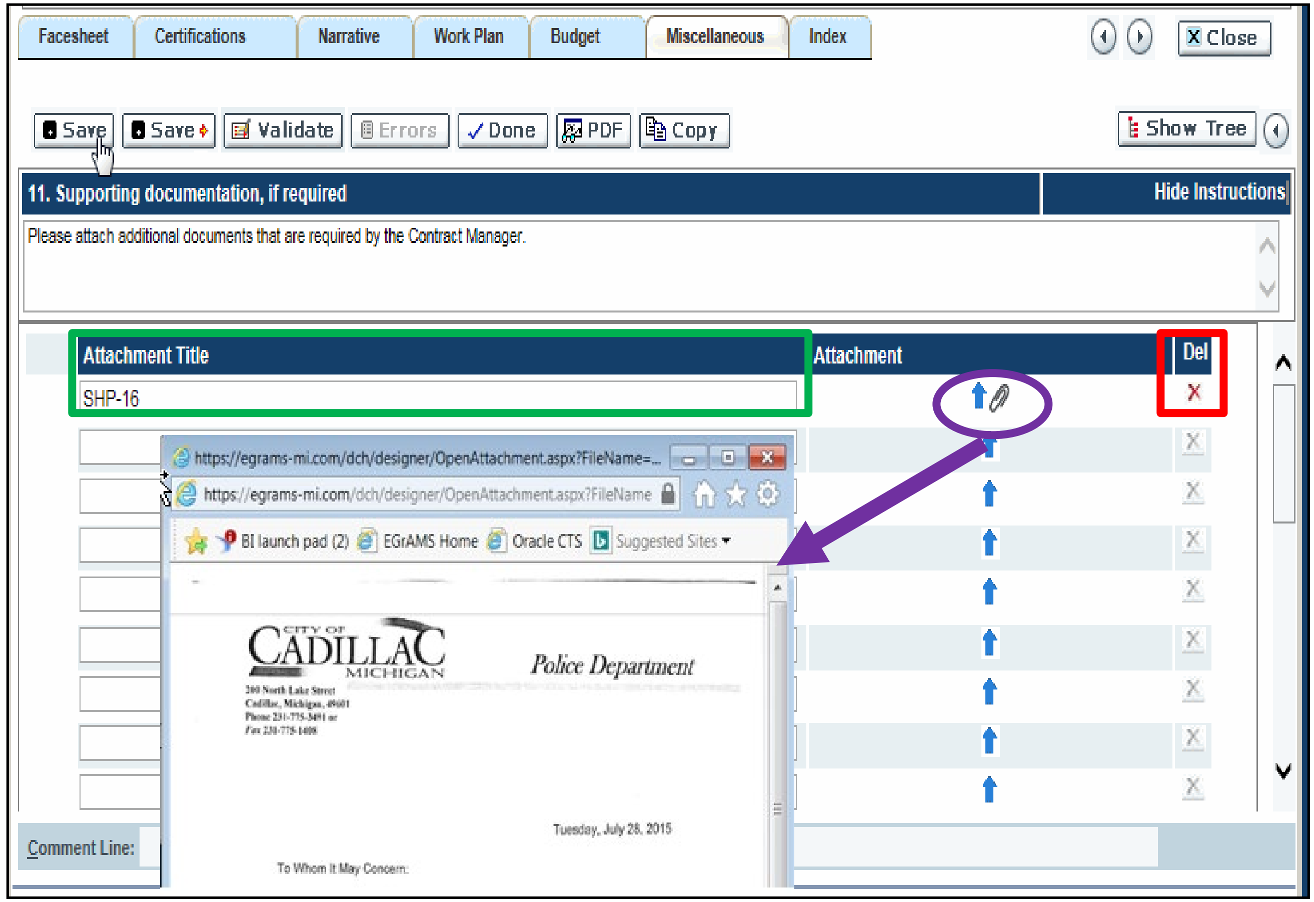
File Name: Attach file from your local system using ‘Browse’ button. PDF files are preferred.

- Navigate the file system on your computer to locate the file to attach.
- Select the file. Click the ‘Open’ button.

Click ‘Save’ button to save.

It’s recommended to view each upload attachment, after it’s been saved.

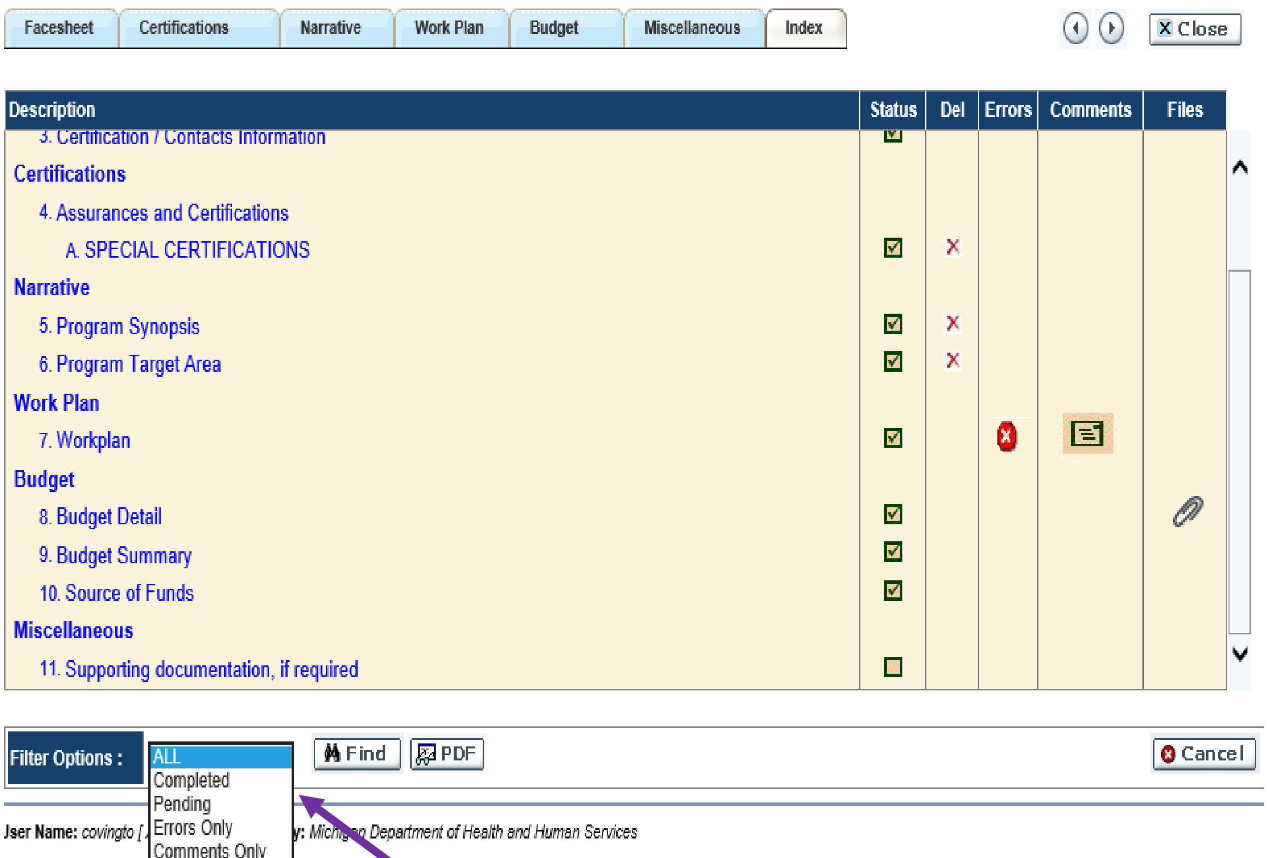
NOTE: This Section is for document attachments that will not be updated throughout the grant period and have not been added elsewhere.



Attachment Title: Enter the Title of the document that is to be attached. This should be short (less than 18 characters) and contain no special characters (#, $, %, etc.).

Application Entry - Index

This section allows the Grantee to review the application progress and identify outstanding errors.



Filter for: Completed, Pending, Errors Only, Comments Only Sections.
Click 'Find' button to make your selection.

- Provides a summarized view of the entire application (errors, attachments, comments, etc.).
- Click the blue hyperlink to go to a specific page within a tab section of the application (provided the User has access to the respective section).

Icons

Check Box (complete section).

Unchecked Box (incomplete section).

Delete button (delete the contents entered in this section).

Error Button (open error window).

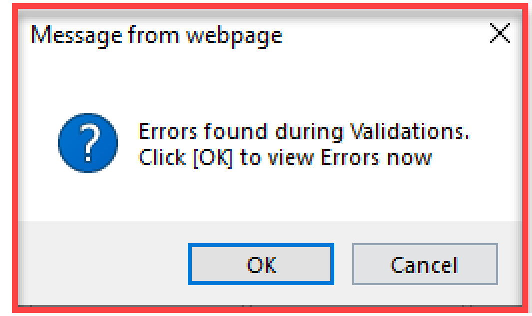
Attachment (open attached file).

Validating, Submitting & Accepting Grant Award

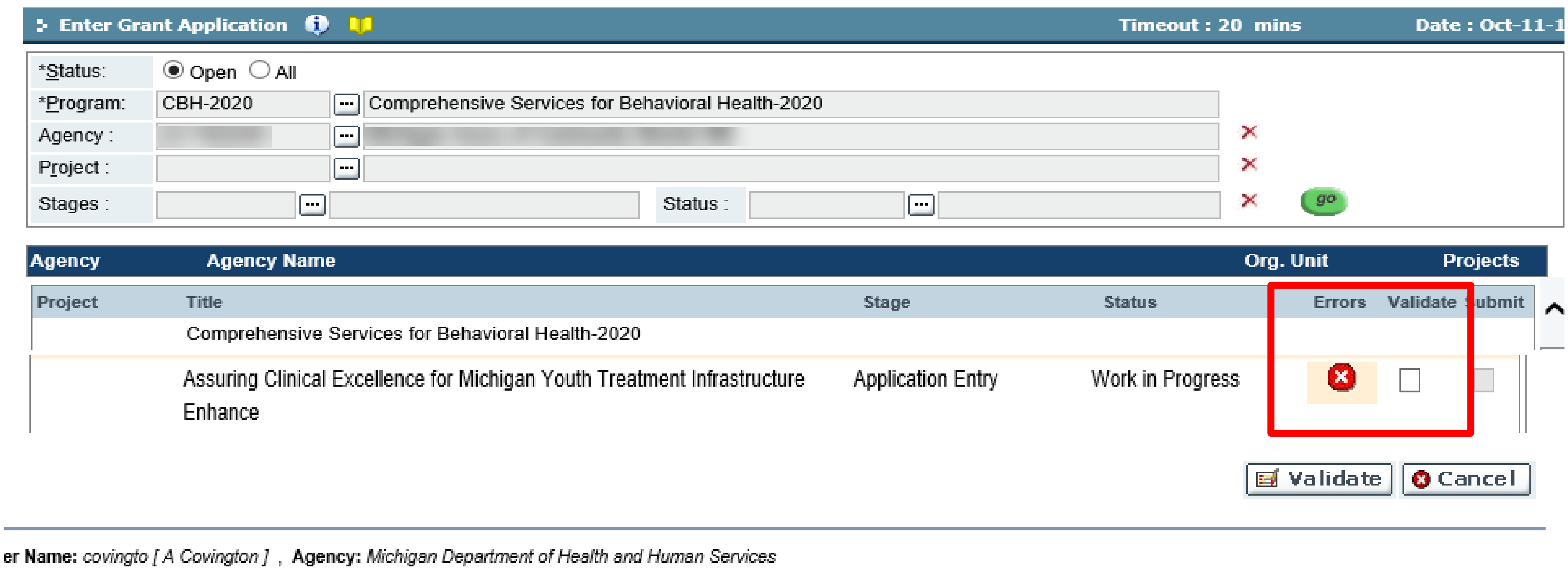
- Validating Application
  - Common Errors
- Application Submission
  - Authorized Official's Application Submission
  - Print Application
  - Viewing/Printing DRAFT Agreement
- Application Approval Process
- Agreement Acceptance
  - Agreement Approval
  - Authorized Official's Electronic Signature
  - View/Print Agreement

Validating Application

- **To Validate Entire Application**:
  - ❑ Go to the ‘Enter Grant Application’ screen (Before you open application)
  - ❑ Check the ‘Validate’ box
  - ❑ Then Click the ‘Validate’ button
  - ❑ The system will check the ENTIRE application
  - ❑ If the application has errors, click the ‘Errors’ button to view the errors
  - ❑ After making the corrections, save and re-validate the application
  - ❑ Repeat these steps until the application is error free



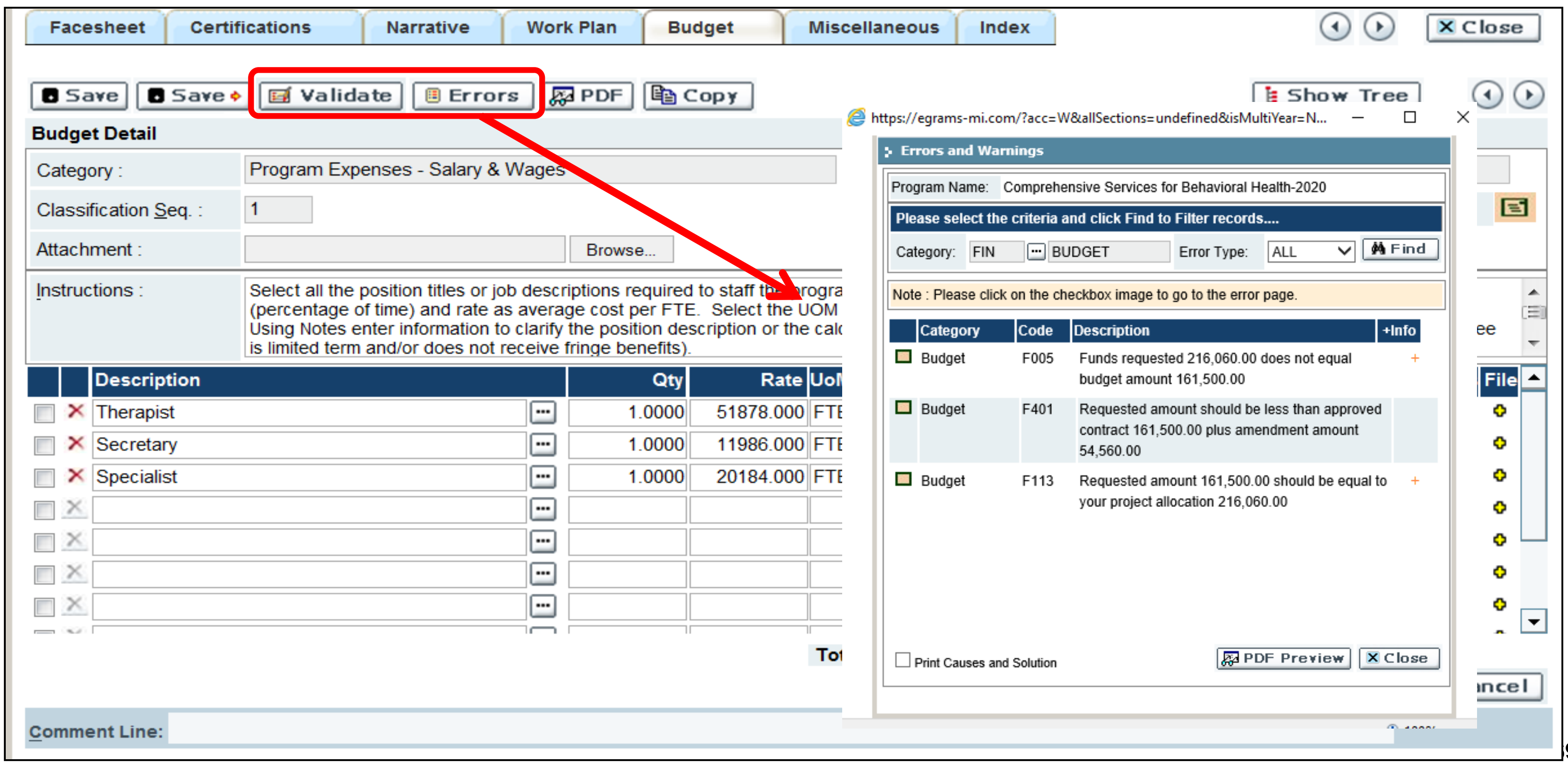
When the application is free of errors, it is ready to submit



Validating Application

To Validate a specific section:

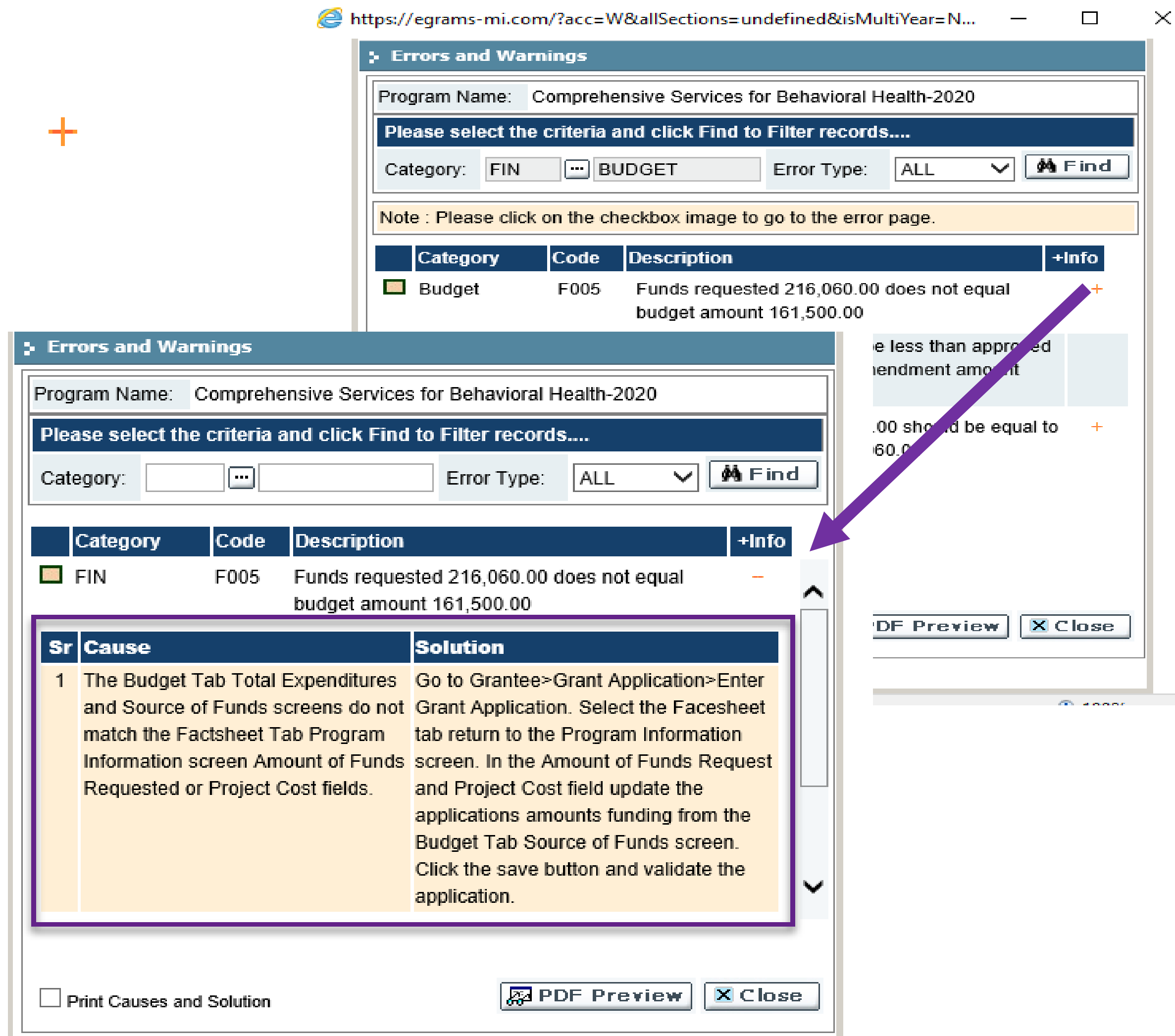
- ❑ Go to the section you want to validate
- ❑ Click the 'Validate' button. This will only validate the specific section you are in
- ❑ If the application has errors, click the 'Errors' button to view the errors.
- ❑ After making the corrections, save and re-validate
- ❑ When the section shows no more errors, you may use the arrows and follow these steps to validate each section



Error Information

- Click the ‘Plus’ icon + on the error screen.

- Another window will open and this will give detailed instructions on how to correct the error



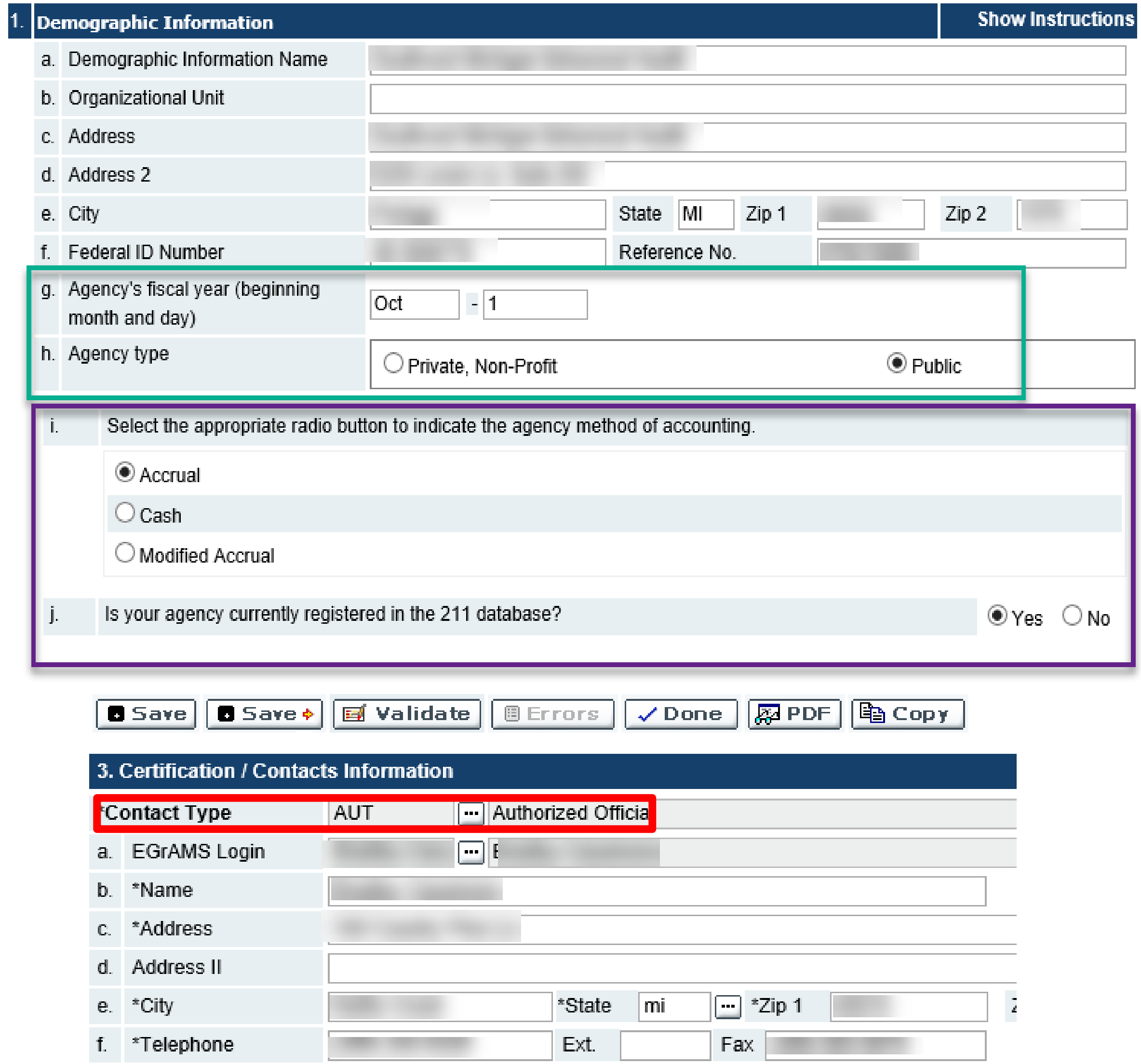
Note: Contact the EGrAMS Help Desk with Questions: MDHHS-EGRAMS-HELP@michigan.gov or (517) 335-3359

Common Errors - Facesheet

- Agency's fiscal year is not selected
- Agency type not selected

- Method of Accounting was not selected
- Agency did not answer the 211 database question

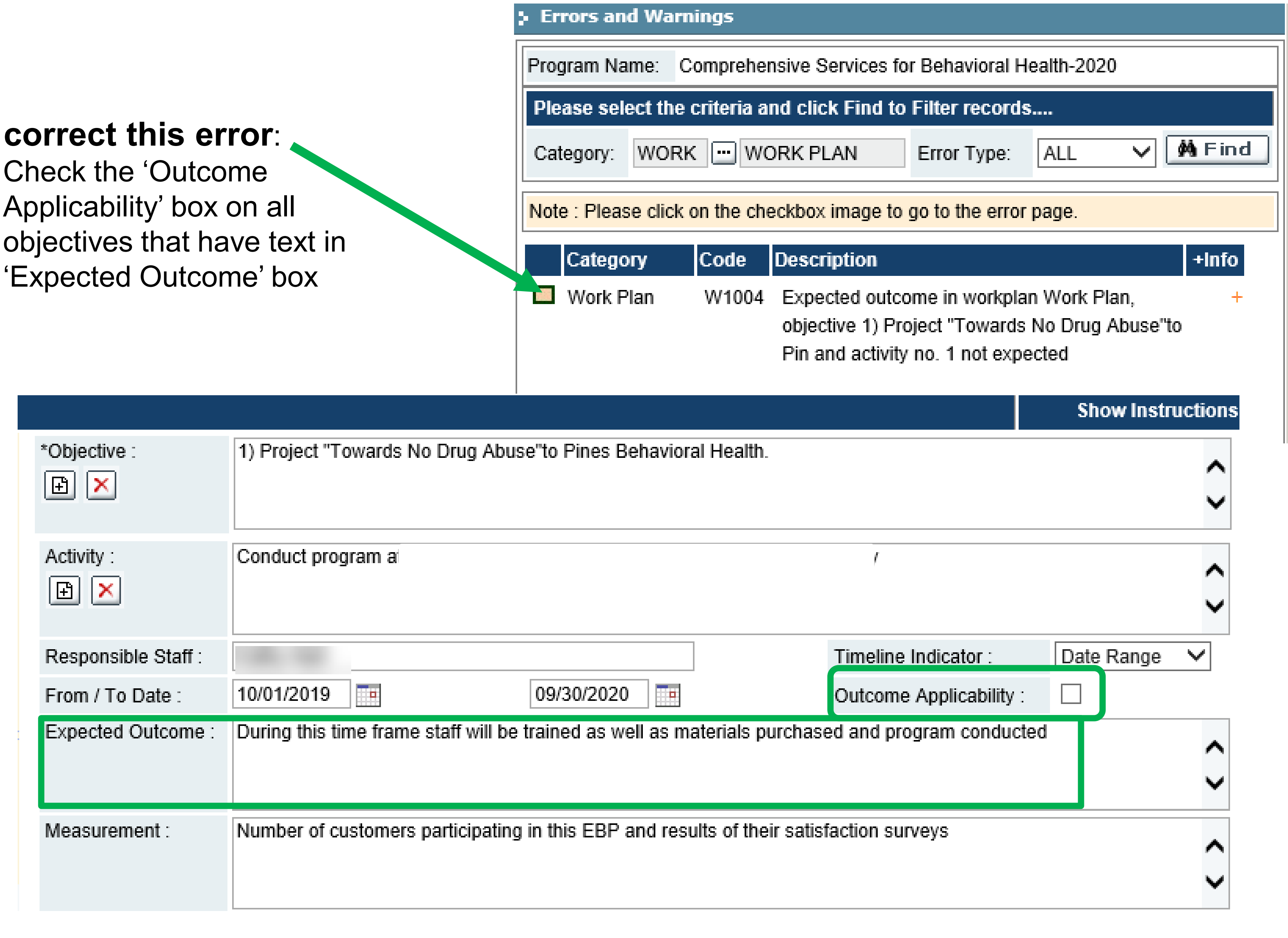
- No Authorized Official, Project Director or Financial Officer listed.



Common Errors –Work Plan

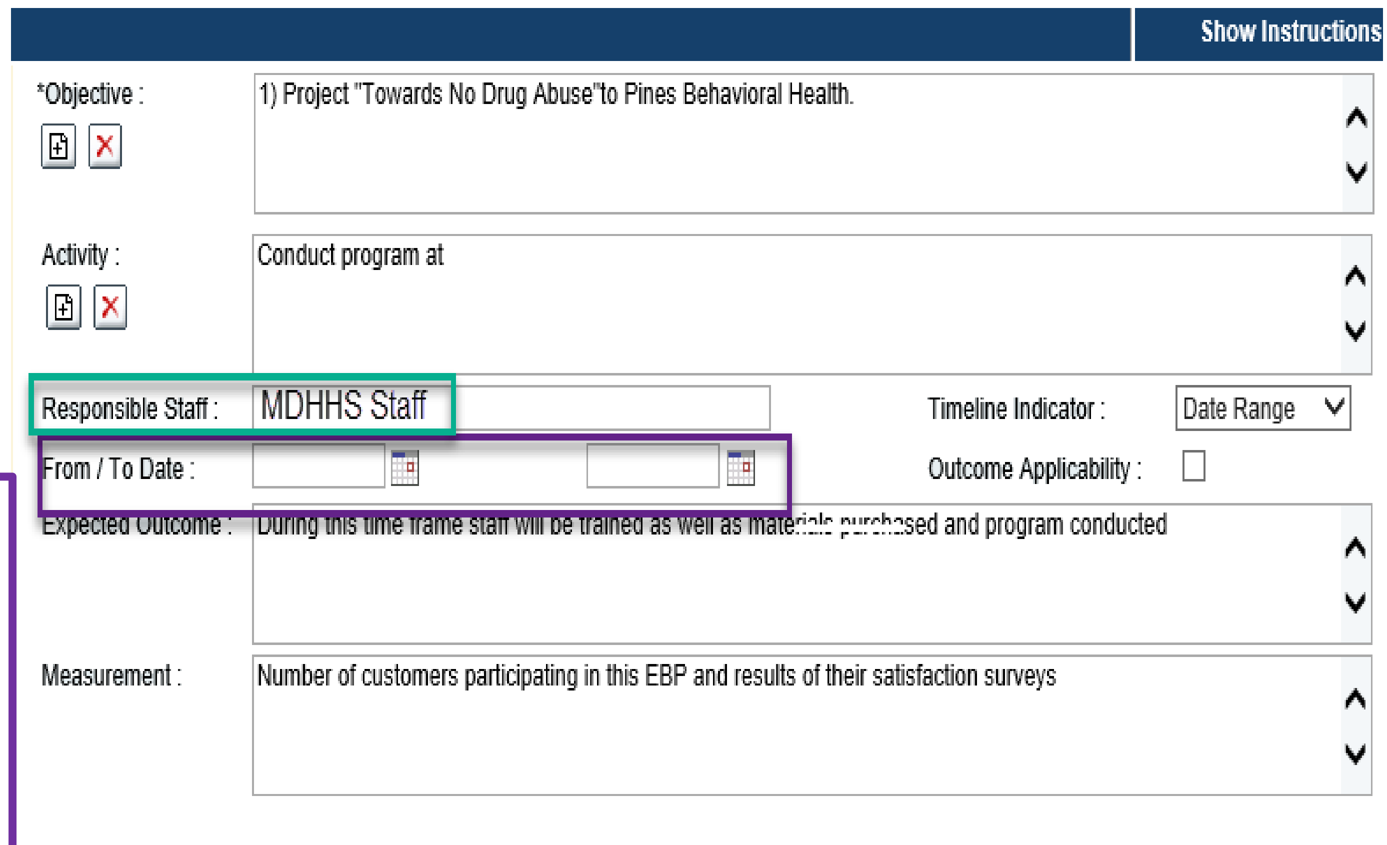
To correct this error:

- Check the ‘Outcome Applicability’ box on all objectives that have text in ‘Expected Outcome’ box



Common Errors –Work Plan

- **Responsible Staff –** Can’t be ‘MDHHS Staff’



- From/To Dates are not entered
- Dates don’t cover the whole grant period
- “Date” is selected when “Date Range” is more appropriate

Common Errors - Budget

To correct this error:

- The amounts in the Facesheet must match the amounts in the Budget section on the Source of Funds page

Errors and Warnings

Program Name: Comprehensive Services for Behavioral Health-2020

Please select the criteria and click Find to Filter records....

Category: ... Error Type: ALL Find

	Category	Code	Description	+Info
	FIN	F005	Funds requested 216,060.00 does not equal budget amount 161,500.00	–

2. Project / Service Information

a. *Project / Service Information Name	[redacted]	
b. Is Implementing Agency Same	Yes / No	
c. If Not, Implementing Agency Name		
d. Project Start Date (mm/dd/yyyy)	10/1/2019	End Date (mm/dd/yyyy) 6/30/2020
e. Amount of Funds Allocated	92,399.00	Project Cost 101,639.00

Amount of Funds Allocated – The amount that your agency is receiving from the State

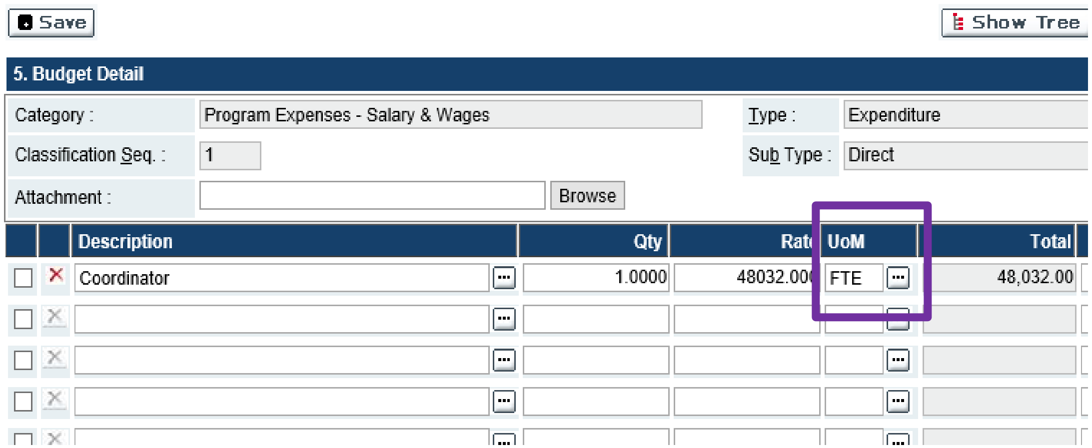
Project Cost – The TOTAL cost of the project, including any required funding match or local funds

7. Source of Funds

Del.	Description	Total	Amount	Cash	Inkind	Narr.	Atta
	TOTAL EXPENDITURES	101,639.00	101,639.00	0.00	0.00		
X	Required Match - Local	9,239.00	0.00	9,239.00	0.00		
X	Local Non-ELPHS	0.00	0.00	0.00	0.00		
X	Local Non-ELPHS	0.00	0.00	0.00	0.00		
X	Local Non-ELPHS	0.00	0.00	0.00	0.00		
X	Other Non-ELPHS	0.00	0.00	0.00	0.00		
X	MDHHS Non Comprehensive	0.00	0.00	0.00	0.00		
X	MDHHS Comprehensive	92,399.00	92,399.00	0.00	0.00		
X	ELPHS - MDHHS Hearing	0.00	0.00	0.00	0.00		
	Totals	101,639.00	92,399.00	9,240.00	0.00		

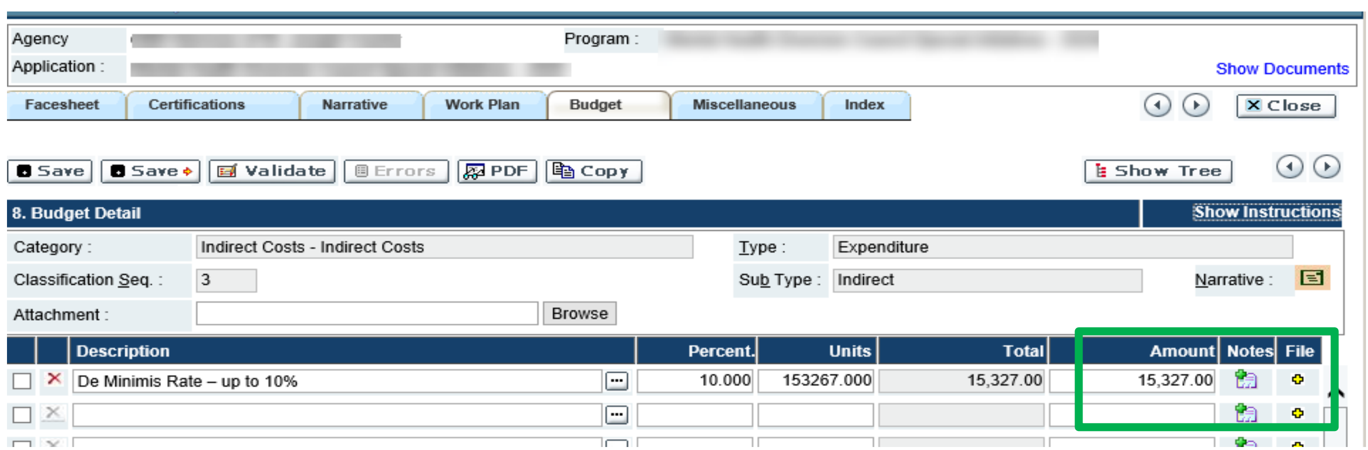
Comment Line:

Common Errors - Budget



- No Unit of Measure

- No attachment of indirect documents (Missing Paper Clip)



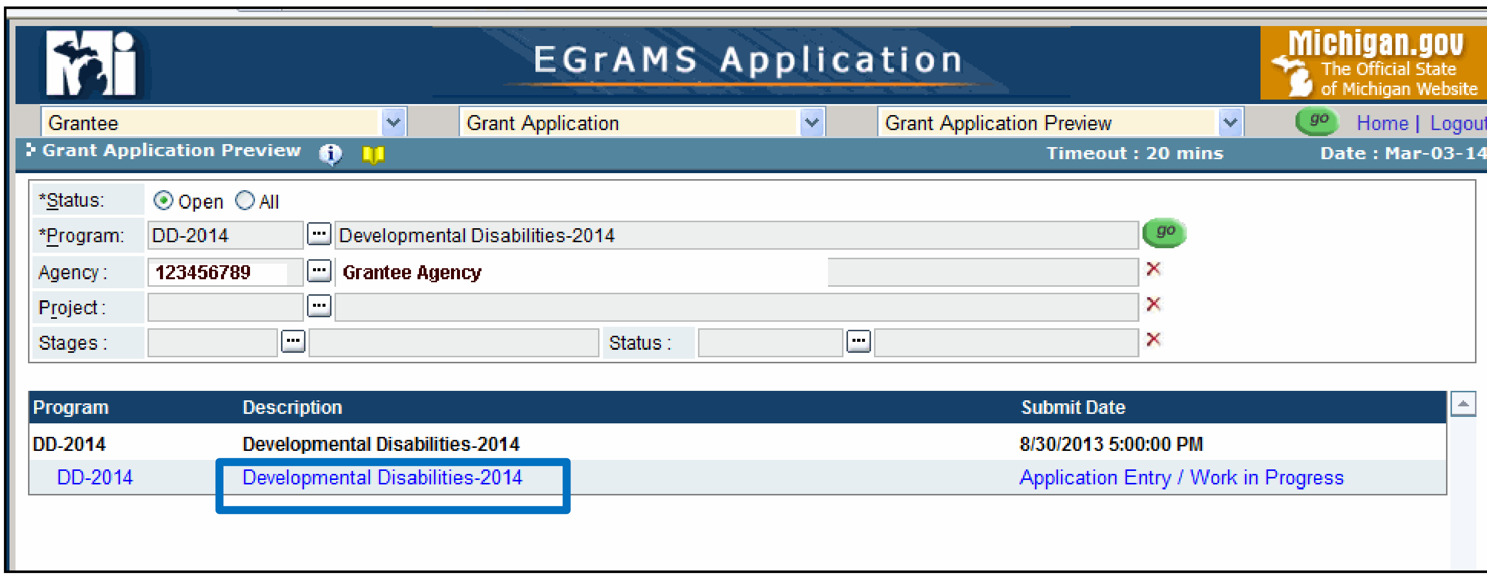
Quick Links

Submitting the Application

ONLY the **AUTHORIZED OFFICAL** can submit the application

To Submit the Application:

- Navigate to **Grantee > Grant Application > Grant Application Preview**
- Program: Select the grant program, using the ‘Lookup’ icon
- Agency: System will pre-populate
- Click ‘Go’ button
- The grant program information should appear
- Click the grant program blue hyperlink

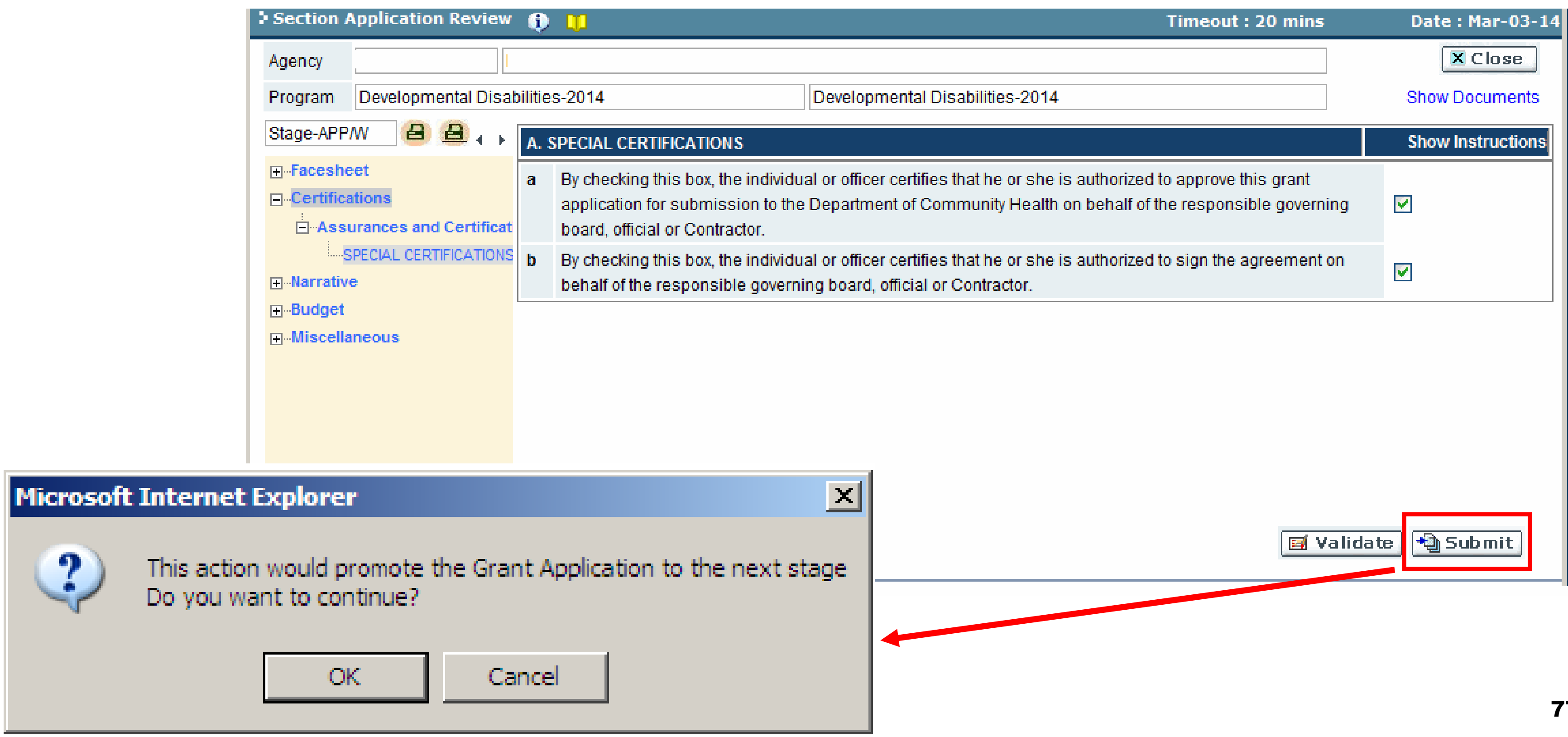


Submitting the Application

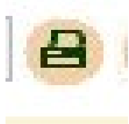
ONLY the **AUTHORIZED OFFICAL** can submit the application

After clicking the blue hyperlink the grant program application will open:

- Review the application to make sure it is correct
- **To make a correction to application**: go to Grantee > Grant Application > Enter Grant Application
- Once the application is correct **go back to Grantee > Grant Application> Grantee Application Preview**, click the 'Submit' button
- Click 'OK' on the system message to promote the application to MDHHS Program for review

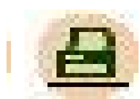


Printing Application



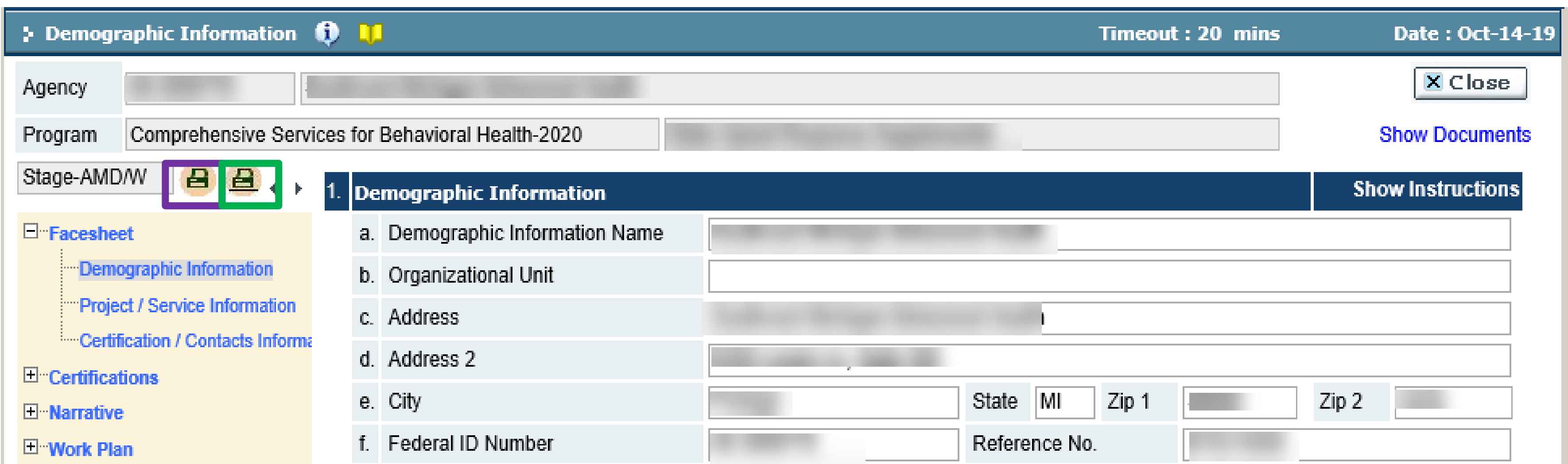
To view PDF version of the application **including PDF attachments**:

- Click on the ‘Printer’ icon to the left



To view PDF version of the application **without PDF attachments**:

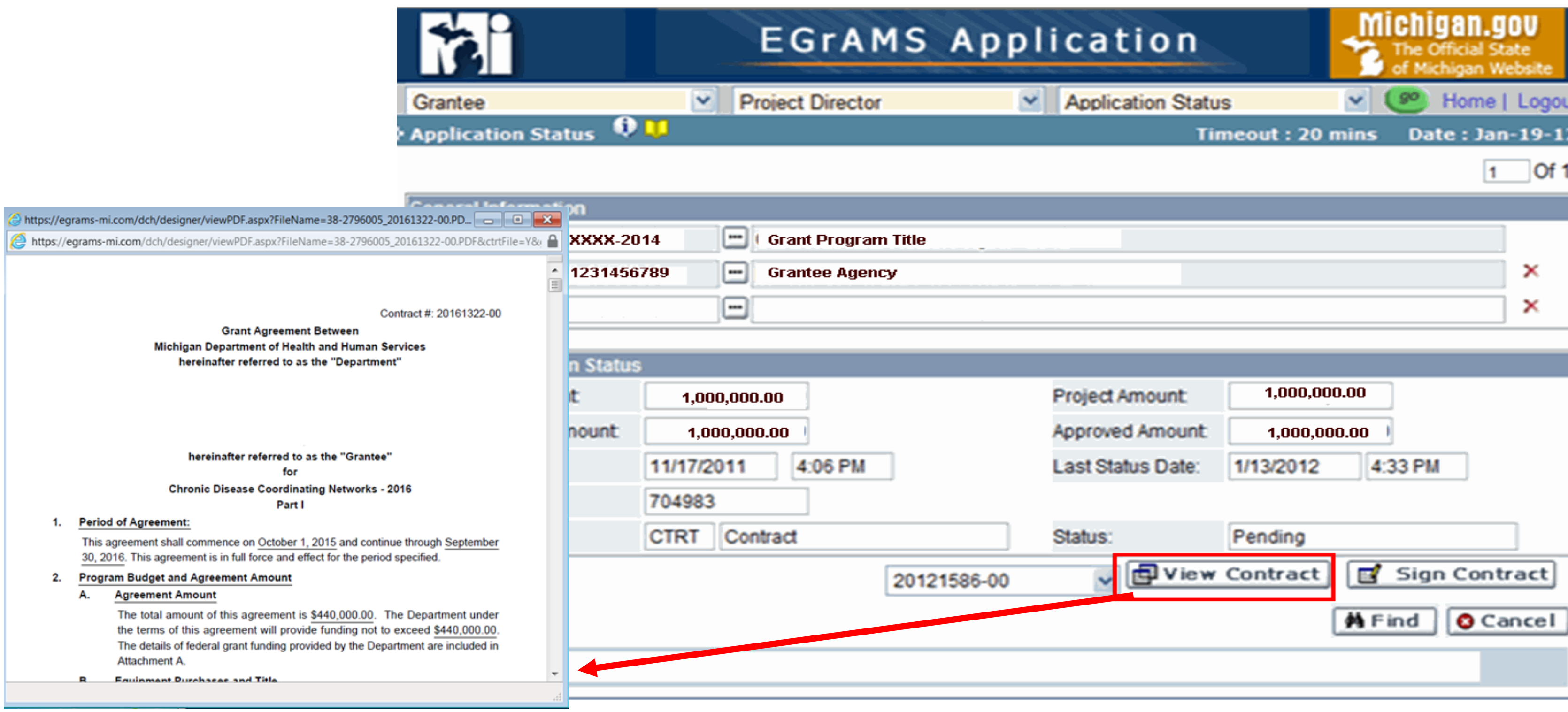
- Click on the ‘Printer’ icon to the right



View/Print Draft Agreement

To view a Draft version of the agreement:

- Navigate to **Grantee > Project Director > Application Status**
- Click 'Go'
- Grant Program: Select the grant program using the 'lookup' icon
- Click the 'Find' button
- Click 'View Contract' button
- A pop-up window containing the draft agreement will open
- Save, email or print draft agreement using the PDF toolbar save, email or print icons



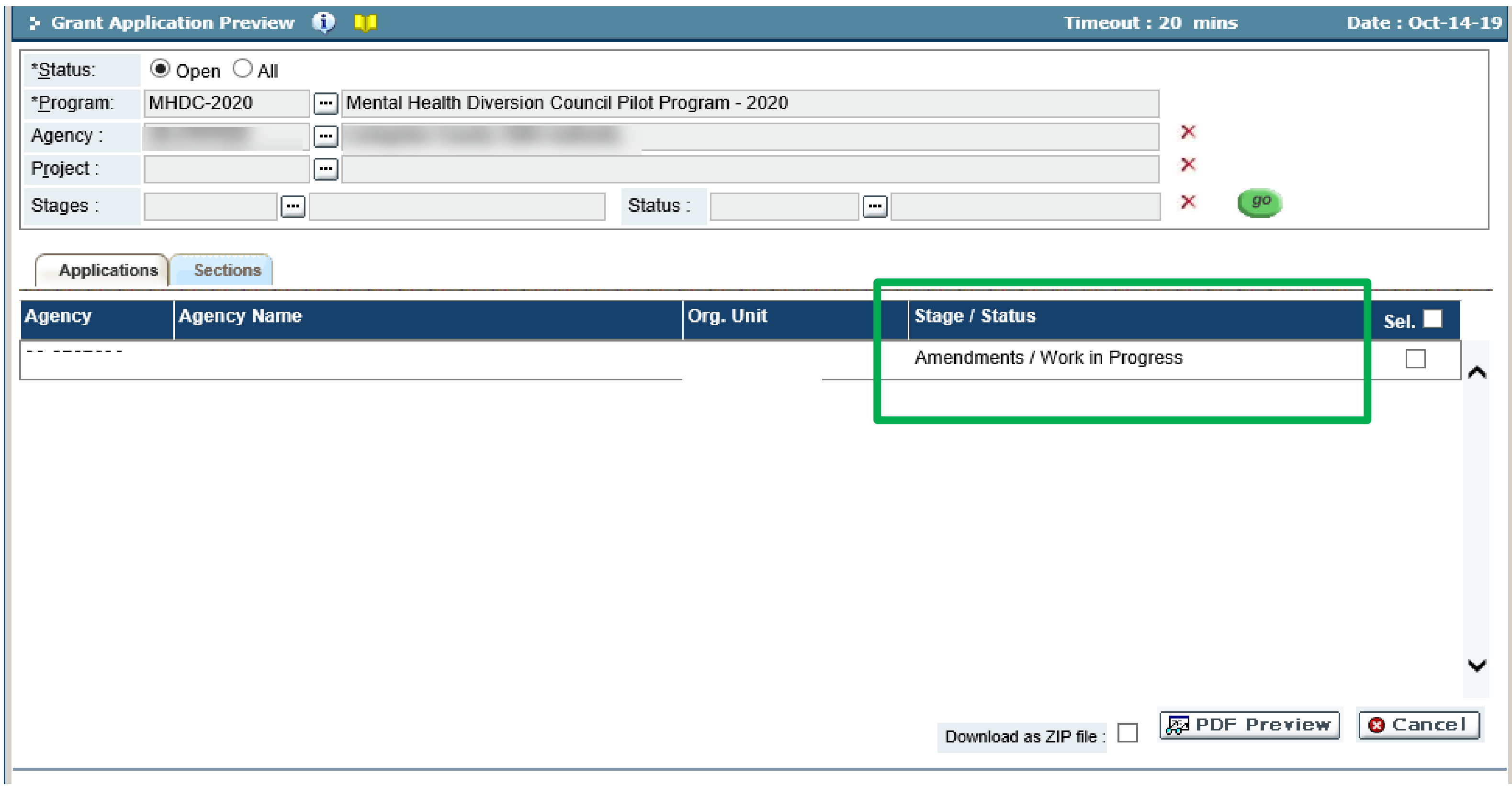
Application Approval Process

To ‘Track’ a Grant through the MDHHS Review & Approval Process:

Once an Application has been **submitted** by the Authorized Official, the Grantee can track the progress by monitoring the Stage **and** Status of the Application.

To view the status of an application:

- Navigate to **Grantee > Grant Application > Grant Application preview**



Application Approval Process

1. Grants section releases Agreement. Grantee must work on grant application sections with goal to submit prior to beginning of agreement period.

Location	Stage	Status
Grantee	Application Entry	Pending / Work in Progress
Grantee	Proposal Revision	Pending / Work in Progress

GRANTEE

2. Grantee submits Agreement. Grantor must now move agreement through this series of approvals:

Location	Stage	Status
Grantor	Program Approval	Ctrt Manager Tasks
Grantor	Program Approval	Pgm Manager Review
Grantor	Budget Approval	Level 1
Grantor	Budget Approval	Level 2
Grantor	Contracts Approval	CTS Tasks
Grantor	Contracts Approval	Admin Svcs Review
Grantor	Contracts Approval	Contract Template
Grantor	Contracts Approval	Ctrt Mgmt Review
Grantor	Master Agreement Contract	Pending

MDHHS

3. Agreement is sent back to Grantee for signature.

Location	Stage	Status
Grantee	Contract	Pending

4. Grantee signs Agreement. Agreement becomes effective on start date.

Location	Stage	Status
Grantee	Contract Signed	Signed by Grantee

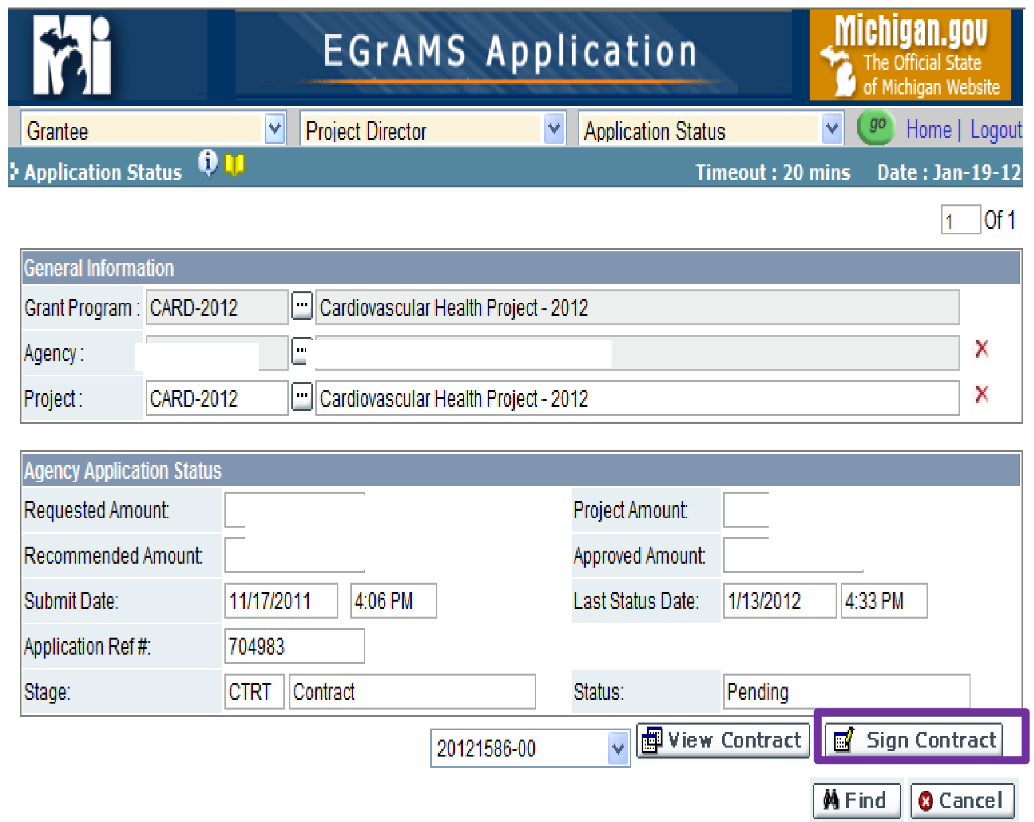
GRANTEE

Signing the Agreement

ONLY the **AUTHORIZED OFFICIAL** can sign the agreement

The **Authorized Official** will receive an email notification, informing them of the agreement to be viewed and signed.

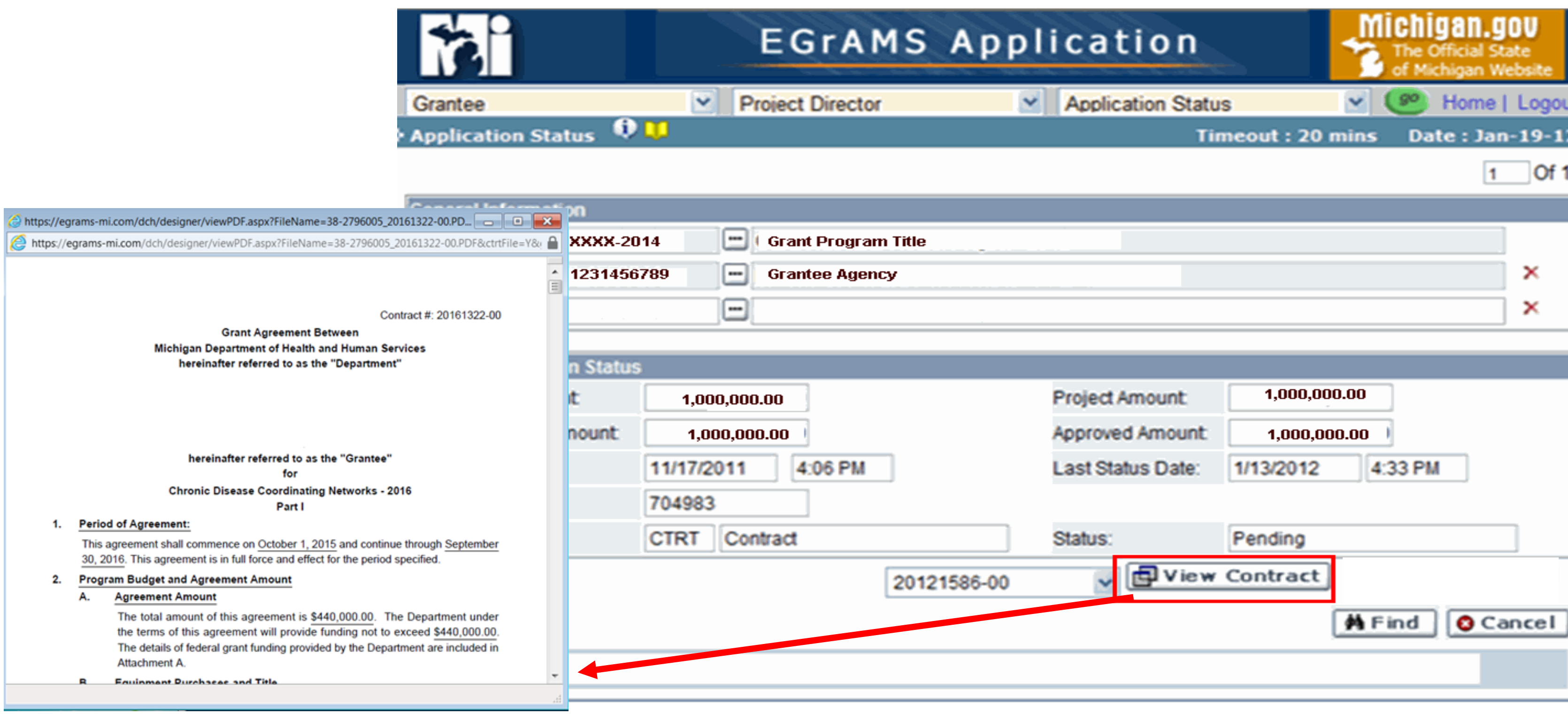
- To Accept/Sign Agreement, select
  - **Grantee > Project Director > Application Status**, from the drop-down menu. Click the ‘Go’ button.
- **Grant Program**: Select a grant program, using the 'Lookup' icon.
- **Agency**: System pre-populates.
- Click the ‘Find’ button. The system displays the grant program status selected.
- Click the ‘View Contract’ button to view a PDF version of the Standard Agreement.
- Click the ‘Contract Signed’ button to accept and execute the agreement.



View/Print Signed Agreement

To view the signed agreement:

- Navigate to **Grantee > Project Director > Application Status**
- Click ‘Go’
- Grant Program: Select the grant program using the ‘lookup’ icon
- Click the ‘Find’ button
- Click ‘View Contract’ button
- A pop-up window containing the draft agreement will open
- Save, email or print draft agreement using the PDF toolbar save, email or print icons



Questions?

Progress Reports

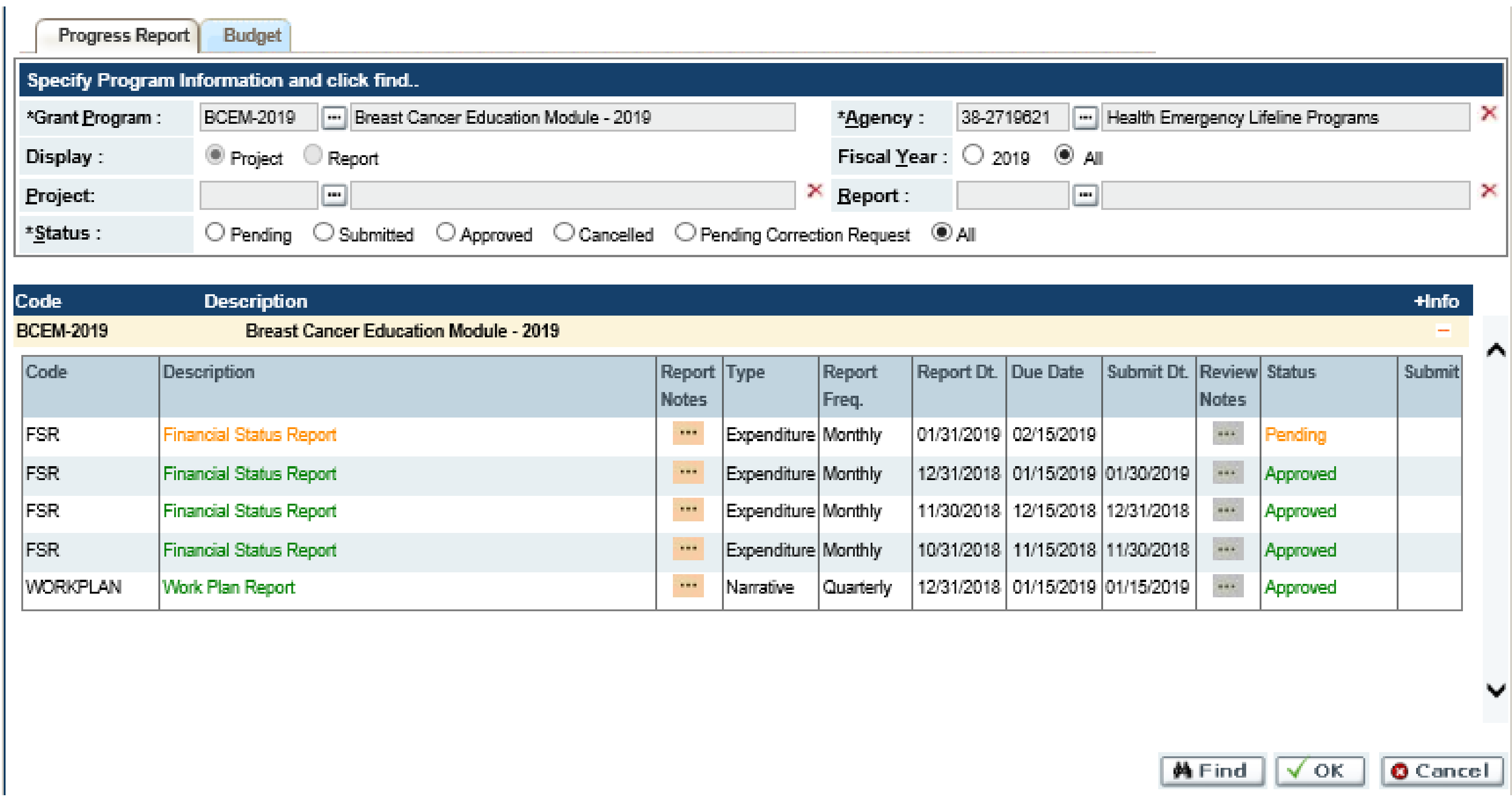
- Understanding the Progress Reports
  - Validate Progress Report
  - Submitting Progress Report
  - Print Progress Reports
- Type of Progress Reports
  - Financial Status Report (FSR)
  - Work Plan
  - Statistical Reports

[Quick Links](#)

Understanding Progress Reports

Navigate to: **Grantee > Reporting > Progress Reports** and click the 'Go' button.

- Select Grant Program using the 'Lookup' icon
- Click 'Find'
- Click <u>any part</u> of the line to open the report.
- Screen will display all reports applicable for the Grant Program selected



Code	Description	Report Notes	Type	Report Freq.	Report Dt.	Due Date	Submit Dt.	Review Notes	Status	Submit
FSR	Financial Status Report	...	Expenditure	Monthly	01/31/2019	02/15/2019		...	Pending	
FSR	Financial Status Report	...	Expenditure	Monthly	12/31/2018	01/15/2019	01/30/2019	...	Approved	
FSR	Financial Status Report	...	Expenditure	Monthly	11/30/2018	12/15/2018	12/31/2018	...	Approved	
FSR	Financial Status Report	...	Expenditure	Monthly	10/31/2018	11/15/2018	11/30/2018	...	Approved	
WORKPLAN	Work Plan Report	...	Narrative	Quarterly	12/31/2018	01/15/2019	01/15/2019	...	Approved	

Understanding Progress Reports

Report Notes: By report if any explanation is provided

Due Date: Due dates and grace days for the respective report

Review Notes: If MDHHS Requests Corrections

Status: Status of the report

Code	Description									+Info
BCEM-2019	Breast Cancer Education Module - 2019									−

Code	Description	Report Notes	Type	Report Freq.	Report Dt.	Due Date	Submit Dt	Review Notes	Status	Submit
FSR	Financial Status Report	...	Expenditure	Monthly	01/31/2019	02/15/2019		...	Pending	
FSR	Financial Status Report	...	Expenditure	Monthly	12/31/2018	01/15/2019	01/30/2019	...	Approved	
FSR	Financial Status Report	...	Expenditure	Monthly	11/30/2018	12/15/2018	12/31/2018	...	Approved	
FSR	Financial Status Report	...	Expenditure	Monthly	10/31/2018	11/15/2018	11/30/2018	...	Approved	
WORKPLAN	Work Plan Report	...	Narrative	Quarterly	12/31/2018	01/15/2019	01/15/2019	...	Approved	

Find OK Cancel

Report color notations (no email reminders are sent):

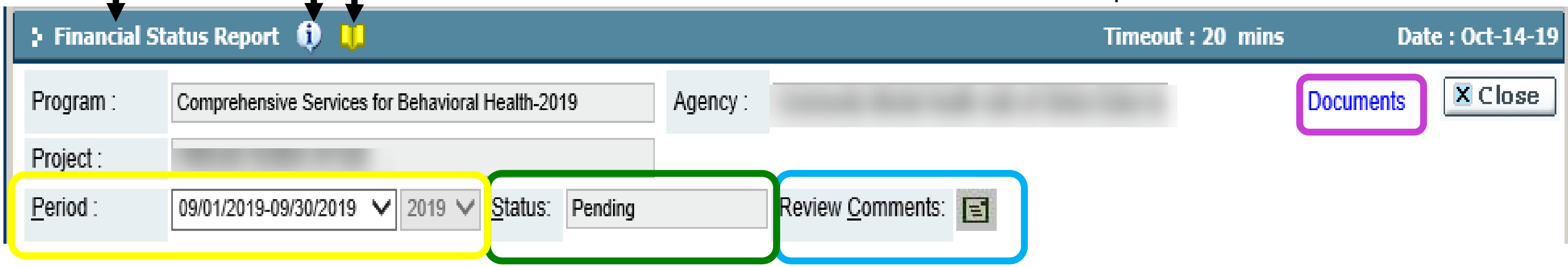
- **Green**: Not due yet, *Submitted*, or *Approved*
- **Gold**: **Due (to be submitted by Report Date + Grace Days)**
- **Red**: **Past Due (Late)**

Understanding Progress Reports

Progress Report Name

Screen information – Provides high level information on the screen

Screen Help – Provides detail instructions and help about the screen



Documents: A link to additional program documentation

Period: The current reporting period appears in the drop down menu. To view a previous reporting period select the period dropdown menu.

Status: Shows the current status of the report: Pending, WIP (Work In Progress), Submitted, Corrections, or Approved.

Review Comments: If the report is sent back for corrections, to view the grantor's comments, click on the reviewer comments icon.

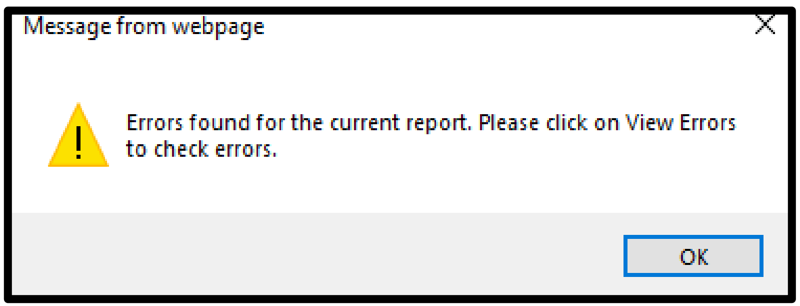
Keep an eye on 'Timeout Left' when doing data entry & Save Often

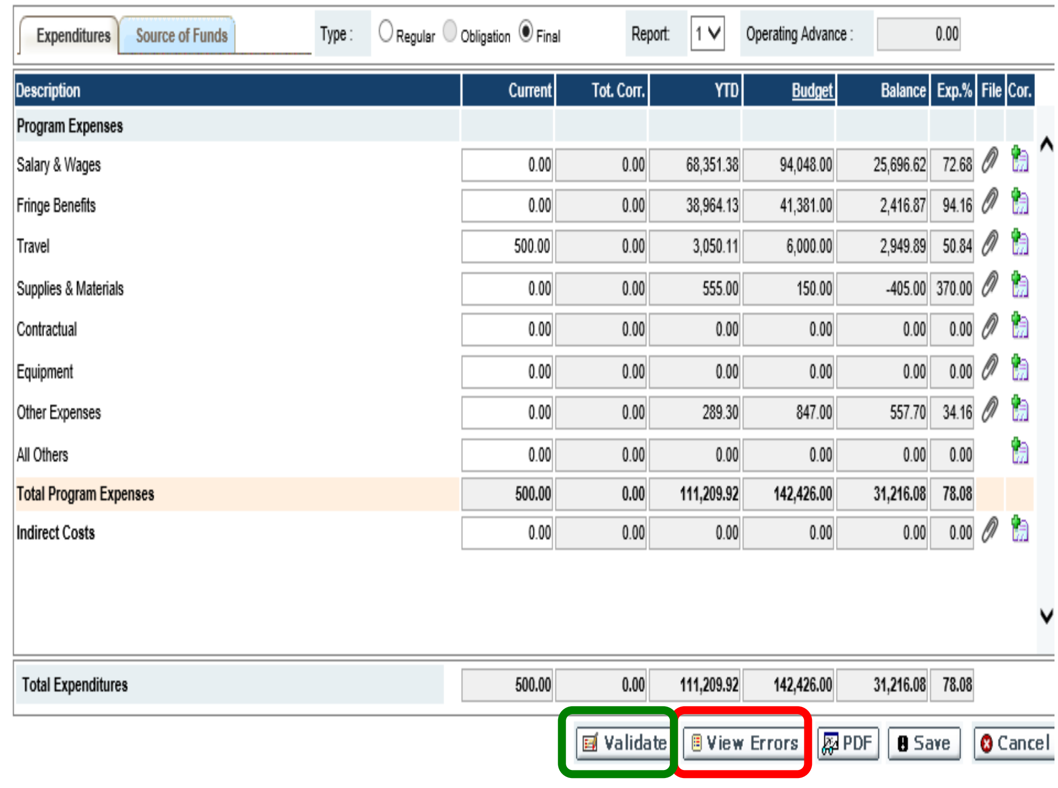
Timeout : 20 mins

Validating Progress Report

To Validate:

- Click on 'Validate' button.
- If errors found, the system displays an informational message:



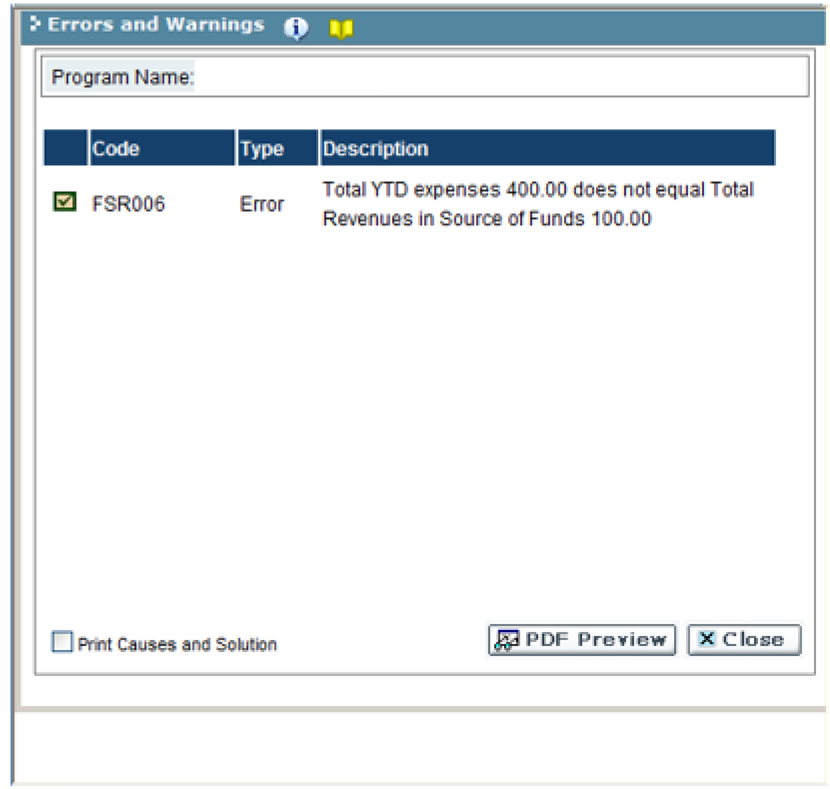


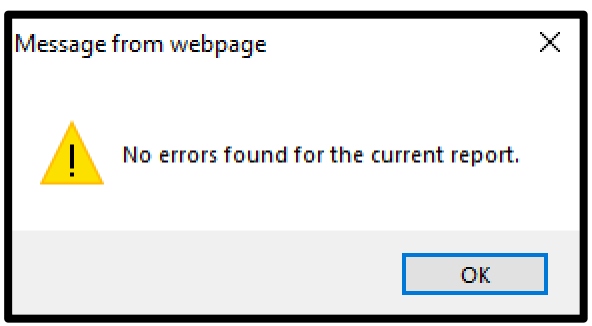
Description	Current	Tot. Corr.	YTD	Budget	Balance	Exp.%	File	Cor.
Program Expenses								
Salary & Wages	0.00	0.00	68,351.38	94,048.00	25,696.62	72.68		
Fringe Benefits	0.00	0.00	38,964.13	41,381.00	2,416.87	94.16		
Travel	500.00	0.00	3,050.11	6,000.00	2,949.89	50.84		
Supplies & Materials	0.00	0.00	555.00	150.00	-405.00	370.00		
Contractual	0.00	0.00	0.00	0.00	0.00	0.00		
Equipment	0.00	0.00	0.00	0.00	0.00	0.00		
Other Expenses	0.00	0.00	289.30	847.00	557.70	34.16		
All Others	0.00	0.00	0.00	0.00	0.00	0.00		
Total Program Expenses	500.00	0.00	111,209.92	142,426.00	31,216.08	78.08		
Indirect Costs	0.00	0.00	0.00	0.00	0.00	0.00		
Total Expenditures	500.00	0.00	111,209.92	142,426.00	31,216.08	78.08		

- Click 'OK' to close error message
- Click 'View Errors'

Validating Progress Report

- Acknowledge message.
- The system displays the error details in a pop-up window.
- Correct the errors in the Progress Report based on the 'Validation' errors report.
- Revalidate the report after correcting the errors. When no errors are found, the system will display this message:





Click to open a .PDF Preview Button for a Document of the errors report.

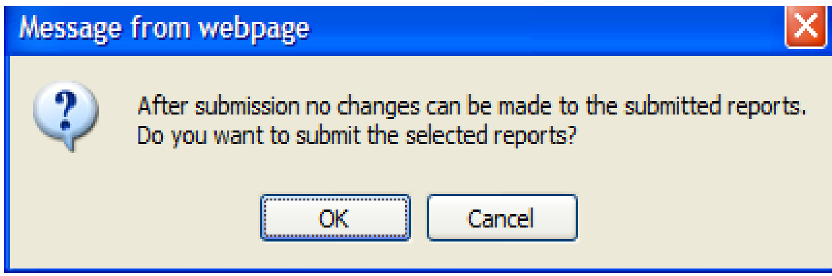
Note: Contact the EGrAMS Help Desk with Questions: MDHHS-EGRAMS-HELP@michigan.gov or (517) 335-3359

Submitting Progress Report

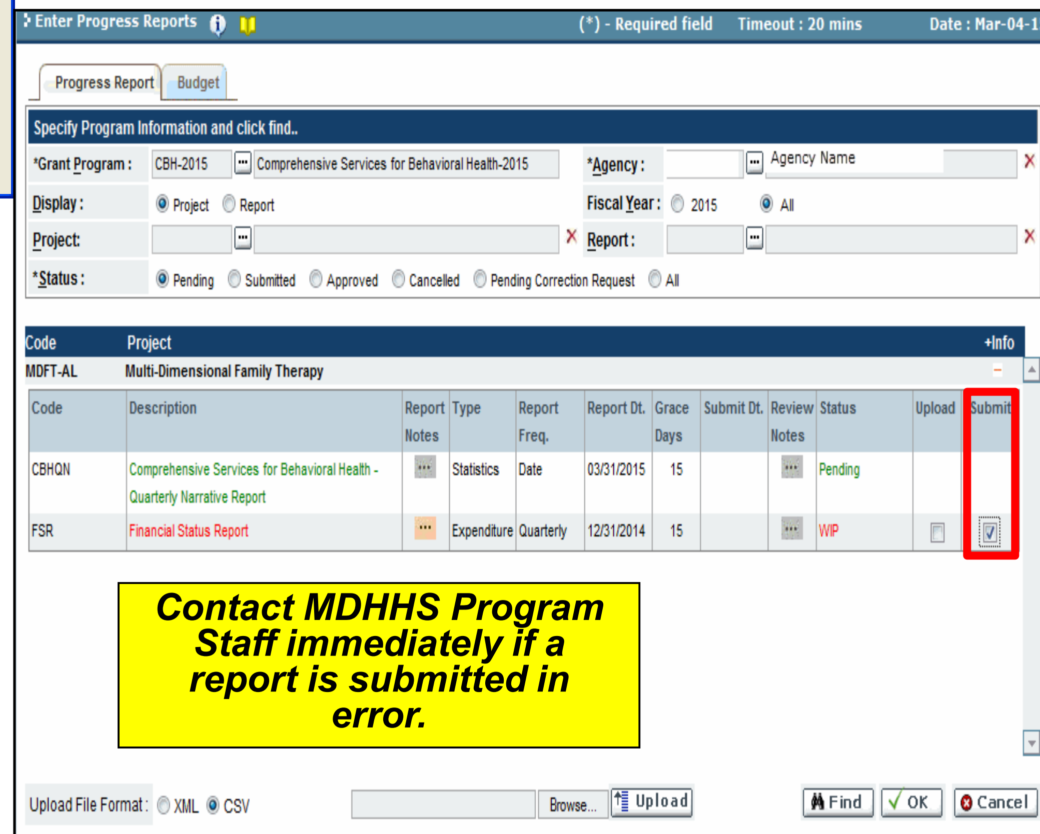
To submit a report:

- On the Progress Report screen, click the ‘Submit’ check box
- Click ‘OK’
- The system will display this message

NOTE: The Financial Officer is the **only** Permission Code that will have the Submit checkbox available to submit an FSR.



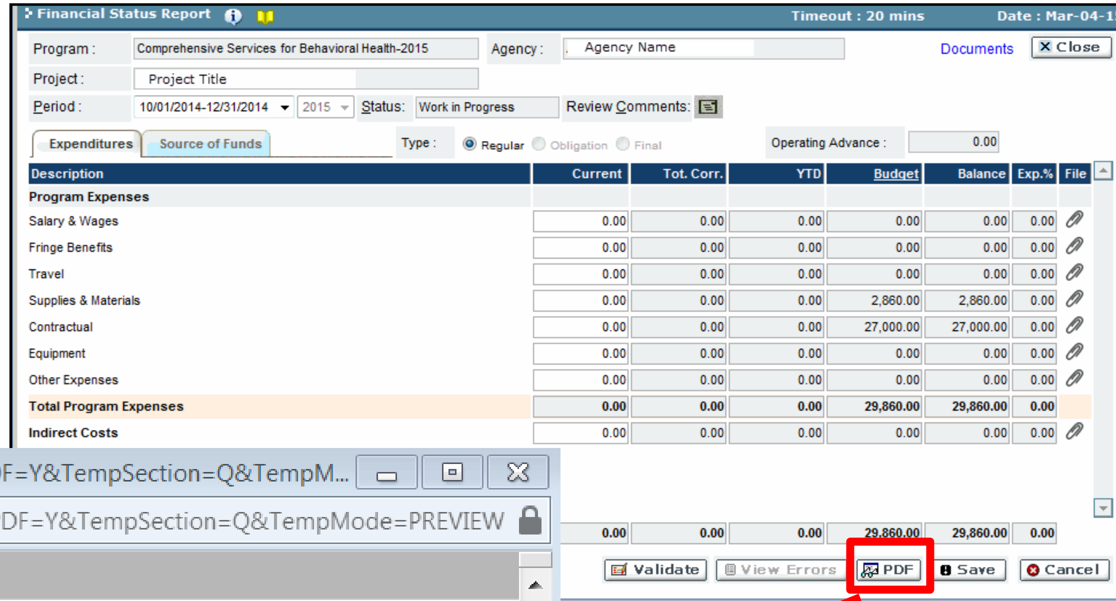
- Acknowledge the message by clicking ‘OK’. This action submits the report
- Upon successfully submission, the status is updated in the Status column (WIP to Submitted)
- The Report is then reviewed and approved or rejected for corrections by MDHHS Program staff

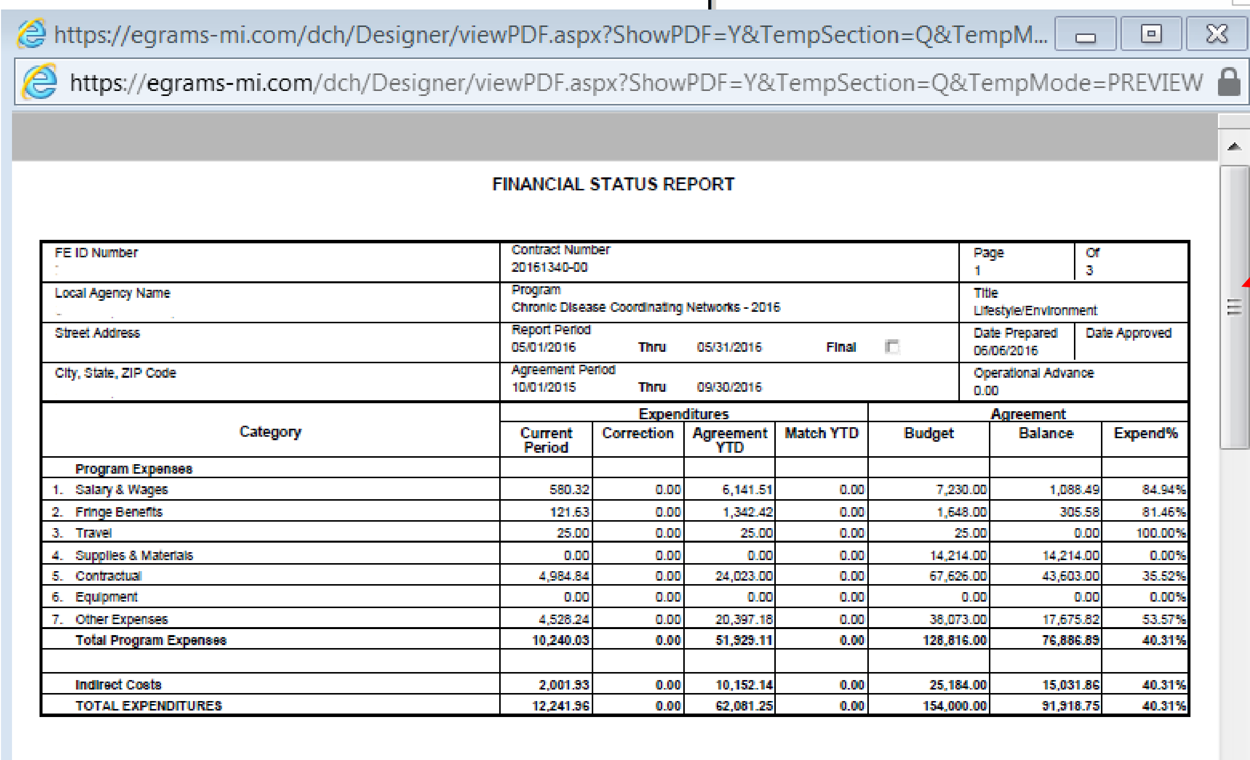


Contact MDHHS Program Staff immediately if a report is submitted in error.

Print a Progress Report

- At any time you can print copies of pending / submitted / approved / corrections status of <u>any</u> Progress Reports (i.e. Financial, Statistical, Work Plan, etc.
- Open a Report from the list and click the Click the 'PDF' button. This will open the Report in a PDF Viewer window.





FINANCIAL STATUS REPORT

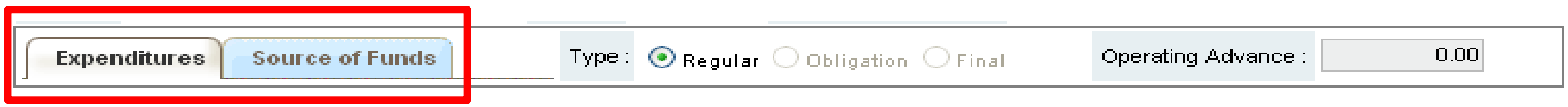
FE ID Number	Contract Number 20161340-00	Page 1	Of 3
Local Agency Name	Program Chronic Disease Coordinating Networks - 2016	Title Lifestyle/Environment	
Street Address	Report Period 05/01/2016 Thru 05/31/2016 Final	Date Prepared 06/06/2016	Date Approved
City, State, ZIP Code	Agreement Period 10/01/2015 Thru 09/30/2016	Operational Advance 0.00	

Category	Expenditures				Agreement		
	Current Period	Correction	Agreement YTD	Match YTD	Budget	Balance	Expend%
Program Expenses							
1. Salary & Wages	580.32	0.00	6,141.51	0.00	7,230.00	1,088.49	84.94%
2. Fringe Benefits	121.63	0.00	1,342.42	0.00	1,648.00	305.58	81.46%
3. Travel	25.00	0.00	25.00	0.00	25.00	0.00	100.00%
4. Supplies & Materials	0.00	0.00	0.00	0.00	14,214.00	14,214.00	0.00%
5. Contractual	4,984.84	0.00	24,023.00	0.00	67,626.00	43,603.00	35.52%
6. Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00%
7. Other Expenses	4,528.24	0.00	20,397.18	0.00	38,073.00	17,675.82	53.57%
Total Program Expenses	10,240.03	0.00	51,929.11	0.00	128,816.00	76,886.89	40.31%
Indirect Costs	2,001.93	0.00	10,152.14	0.00	25,184.00	15,031.86	40.31%
TOTAL EXPENDITURES	12,241.96	0.00	62,081.25	0.00	154,000.00	91,918.75	40.31%

Financial Status Report (FSR)

The Financial Status Report (FSR) provides a standardized format for reporting expenditures and the source of funds related to the Grant Program.

FSR Worksheet Tabs: The FSR contains two tabs: Expenditures and Source of Funds. Each tab contains a worksheet that the Grantee must complete to submit an FSR.



- **Expenditures Tab** – Allows the grantee to report on current period expenses as identified in their original or amended agreement.
- **Source of Funds Tab** – Assures that all source of funds are included and that the match requirement is met, as was identified in the agreement.
- FSR Types:
  - **Regular** – A monthly financial expenditure report.
  - **Obligation** – A one-time report submitted in late August/early September in which the Grantee **estimates** the amount of remaining expenditures that will be billed in the grant year. Only has 1 tab
  - **Final** – The last financial report of expenditures for a Grant Agreement. ***NOTE:*** Only **one** FSR is submitted for each reporting period, except for September. In the final reporting period - several "September reports" are allowed and will need to be approved. Also, be sure that a final FSR is submitted and approved (even if its a zero FSR).

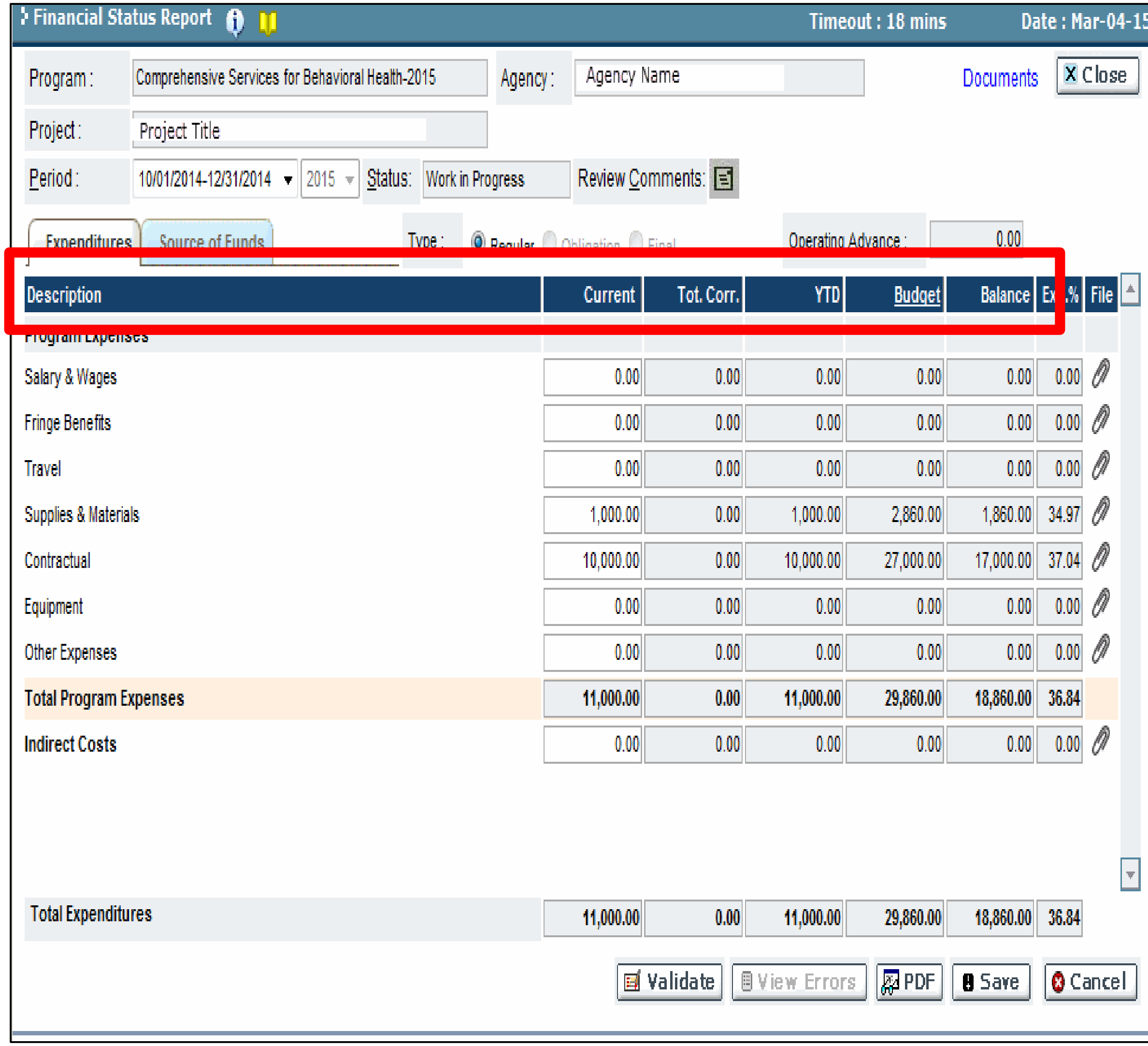
Financial Status Report (FSR)

Expenditures Tab

- The Grantee enters the allowable costs incurred for carrying out program specific activities on the 'Expenditure' tab.

Expenditures Columns:

- **Description Column** – Lists the major budget categories, as found on the application
- **Current Column** – Enter the expenditures by budget category as reported for the current period.
- **Total Corr. Column** – Corrections by budget category for the Agreement to date.
- **YTD Column** –Year-To-Date expenditures by budget category for the Agreement.
- **Budget** – Current budget of the last signed Agreement.
- **Balance** – The system automatically calculates the remaining balance of the Agreement by budget category.



Financial Status Report Timeout : 18 mins Date : Mar-04-15

Program : Comprehensive Services for Behavioral Health-2015 Agency : Agency Name Documents X Close

Project : Project Title

Period : 10/01/2014-12/31/2014 2015 Status: Work in Progress Review Comments:

Expenditures Source of Funds Type : Regular Obligation Final Operating Advance : 0.00

Description	Current	Tot. Corr.	YTD	Budget	Balance	Ex %	File
Program Expenses							
Salary & Wages	0.00	0.00	0.00	0.00	0.00	0.00	
Fringe Benefits	0.00	0.00	0.00	0.00	0.00	0.00	
Travel	0.00	0.00	0.00	0.00	0.00	0.00	
Supplies & Materials	1,000.00	0.00	1,000.00	2,860.00	1,860.00	34.97	
Contractual	10,000.00	0.00	10,000.00	27,000.00	17,000.00	37.04	
Equipment	0.00	0.00	0.00	0.00	0.00	0.00	
Other Expenses	0.00	0.00	0.00	0.00	0.00	0.00	
Total Program Expenses	11,000.00	0.00	11,000.00	29,860.00	18,860.00	36.84	
Indirect Costs	0.00	0.00	0.00	0.00	0.00	0.00	
Total Expenditures	11,000.00	0.00	11,000.00	29,860.00	18,860.00	36.84	

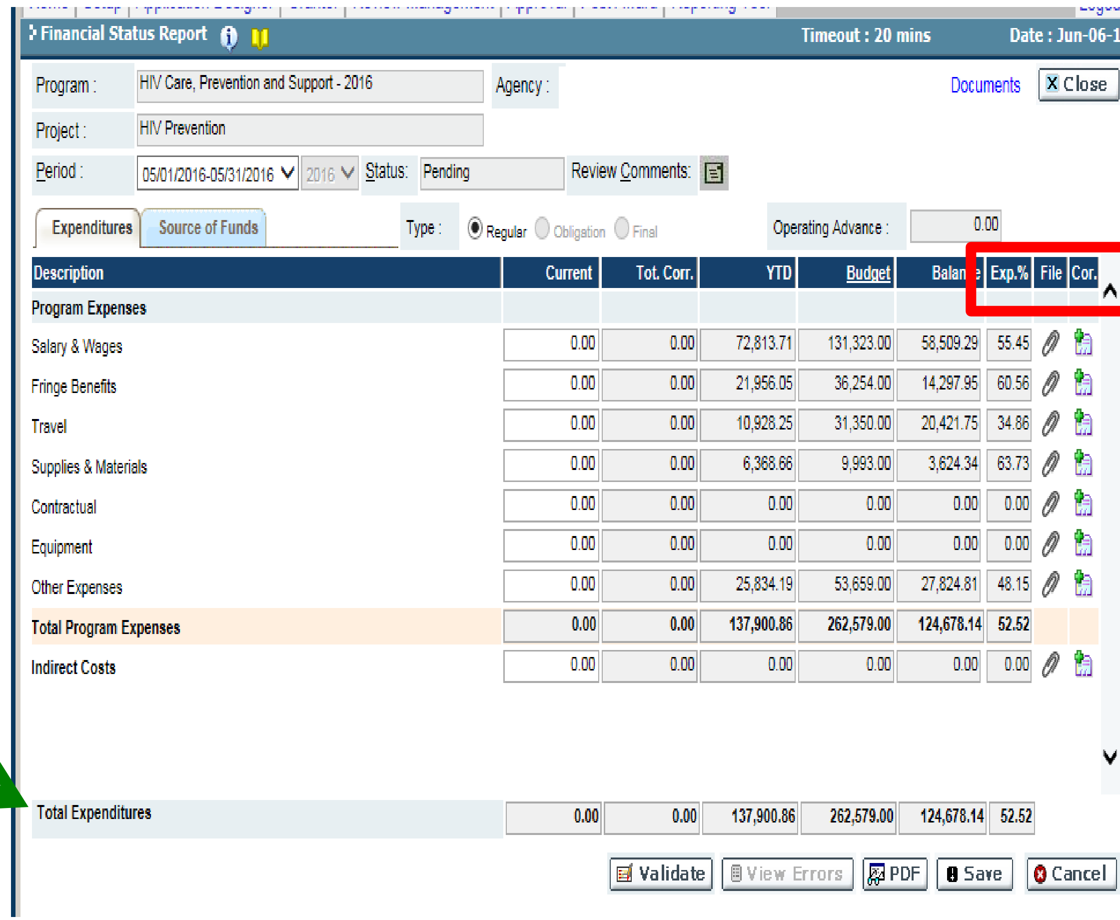
Validate View Errors PDF Save Cancel

[Quick Links](#)

Financial Status Report (FSR)

Expenditures Tab cont'd

- **Exp%** – Refers to the percentage used within each budget category.
- **File** – Click the 'Paper Clip' icon to upload an attached documentation /supplemental FSRs as required by MDHHS.
- **Cor.** – The system allows the Grantee to make corrections to a previous period's Financial Status Report statements. See slides 98-99
- **Total Expenditures** – Total expenses to date.
- Click the 'Save' button to save changes.
- **Click the 'Validate' button to check for errors (refer to page 89).**



Description	Current	Tot. Corr.	YTD	Budget	Balance	Exp.%	File	Cor.
Program Expenses								
Salary & Wages	0.00	0.00	72,813.71	131,323.00	58,509.29	55.45		
Fringe Benefits	0.00	0.00	21,956.05	36,254.00	14,297.95	60.56		
Travel	0.00	0.00	10,928.25	31,350.00	20,421.75	34.86		
Supplies & Materials	0.00	0.00	6,368.66	9,993.00	3,624.34	63.73		
Contractual	0.00	0.00	0.00	0.00	0.00	0.00		
Equipment	0.00	0.00	0.00	0.00	0.00	0.00		
Other Expenses	0.00	0.00	25,834.19	53,659.00	27,824.81	48.15		
Total Program Expenses	0.00	0.00	137,900.86	262,579.00	124,678.14	52.52		
Indirect Costs	0.00	0.00	0.00	0.00	0.00	0.00		
Total Expenditures	0.00	0.00	137,900.86	262,579.00	124,678.14	52.52		

NOTE: The Financial Officer is the **only** Permission Code that will have the Submit checkbox available to submit an FSR.

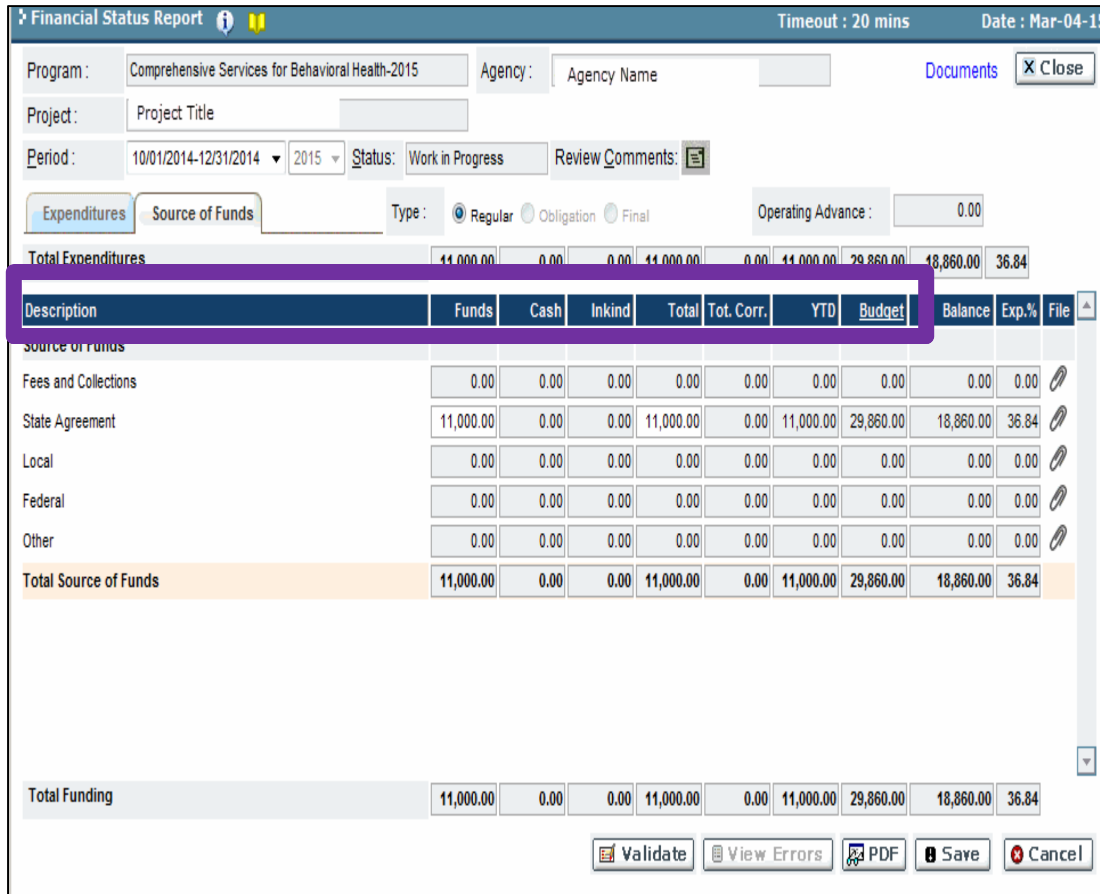
Financial Status Report (FSR)

Source of Funds Tab

- The Source of Funds tab assures that all source of funds are included and that the match requirement is met, as identified in the Agreement.

Source of Funds Columns:

- **Funds**
- **Cash**
- **In-Kind**
- **Validate (see page 89)**



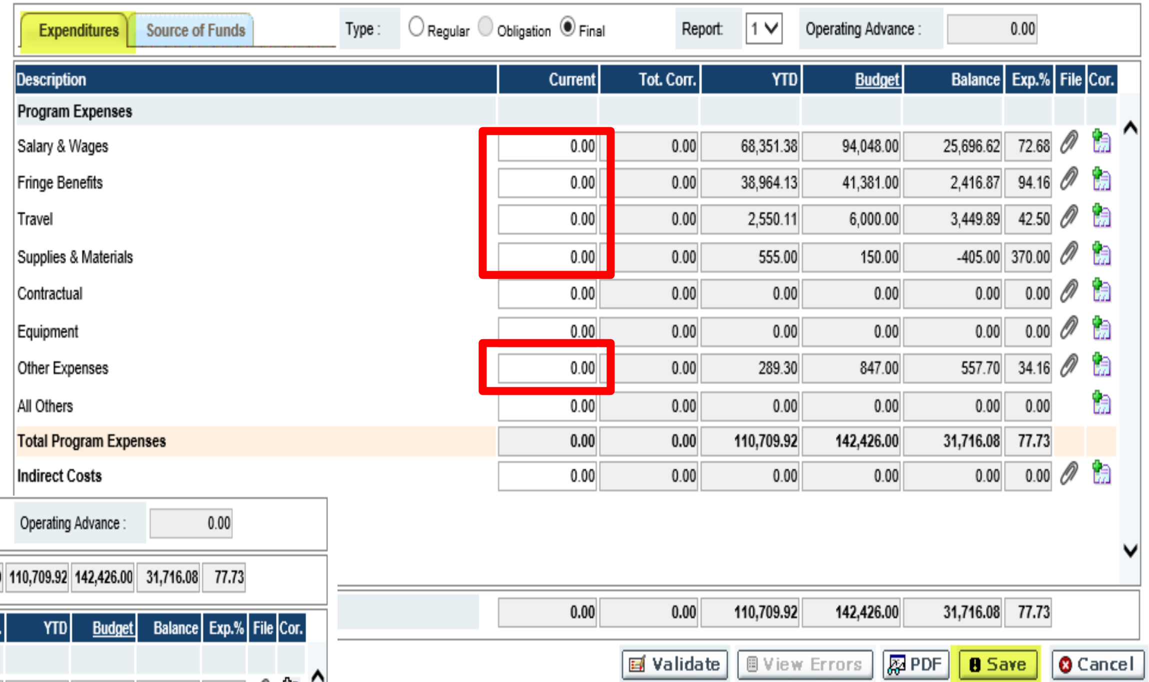
NOTE: The Financial Officer is the **only** Permission Code that will have the Submit checkbox available to submit an FSR.

Completing Zero FSR

To complete a Zero Financial Status Report.

Expenditure Tab: select the Budget Category field to reflect zero expenses for the reporting period.

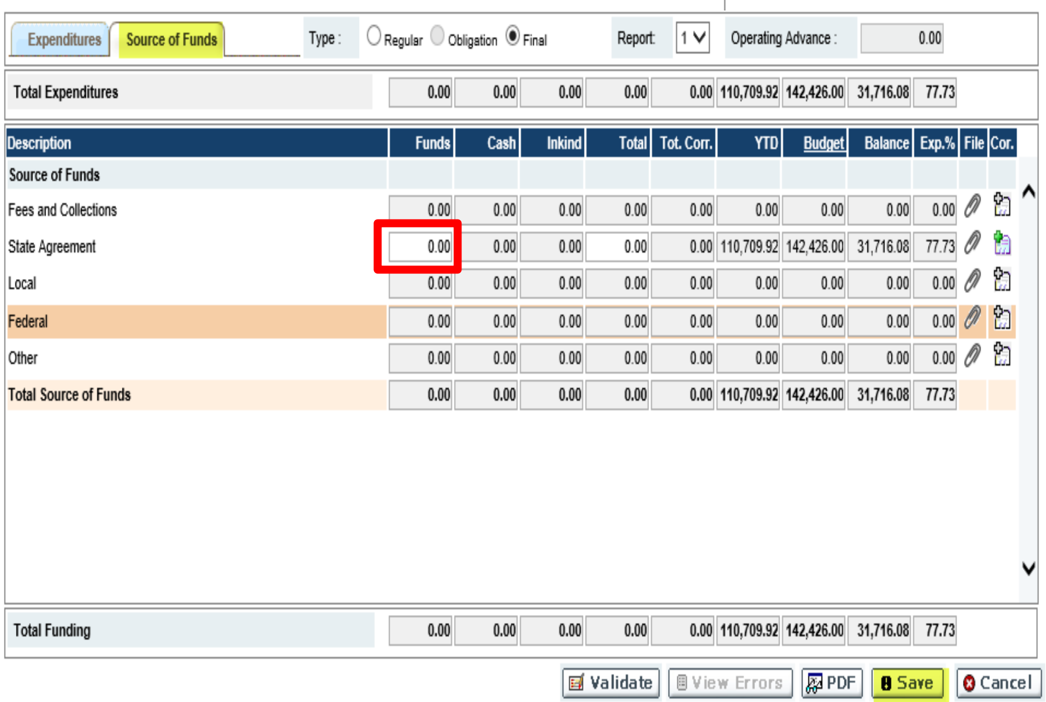
- In the Current column enter 0.00, for every budget category.
- Click the 'Save' button.



Expenditures | Source of Funds | Type : Regular Obligation Final | Report: 1 | Operating Advance : 0.00

Description	Current	Tot. Corr.	YTD	Budget	Balance	Exp.%	File	Cor.
Program Expenses								
Salary & Wages	0.00	0.00	68,351.38	94,048.00	25,696.62	72.68		
Fringe Benefits	0.00	0.00	38,964.13	41,381.00	2,416.87	94.16		
Travel	0.00	0.00	2,550.11	6,000.00	3,449.89	42.50		
Supplies & Materials	0.00	0.00	555.00	150.00	-405.00	370.00		
Contractual	0.00	0.00	0.00	0.00	0.00	0.00		
Equipment	0.00	0.00	0.00	0.00	0.00	0.00		
Other Expenses	0.00	0.00	289.30	847.00	557.70	34.16		
All Others	0.00	0.00	0.00	0.00	0.00	0.00		
Total Program Expenses	0.00	0.00	110,709.92	142,426.00	31,716.08	77.73		
Indirect Costs	0.00	0.00	0.00	0.00	0.00	0.00		
	0.00	0.00	110,709.92	142,426.00	31,716.08	77.73		

Validate | View Errors | PDF | Save | Cancel



Expenditures | Source of Funds | Type : Regular Obligation Final | Report: 1 | Operating Advance : 0.00

Description	Funds	Cash	Inkind	Total	Tot. Corr.	YTD	Budget	Balance	Exp.%	File	Cor.
Total Expenditures	0.00	0.00	0.00	0.00	0.00	110,709.92	142,426.00	31,716.08	77.73		
Source of Funds											
Fees and Collections	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
State Agreement	0.00	0.00	0.00	0.00	0.00	110,709.92	142,426.00	31,716.08	77.73		
Local	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Federal	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Other	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Total Source of Funds	0.00	0.00	0.00	0.00	0.00	110,709.92	142,426.00	31,716.08	77.73		
Total Funding	0.00	0.00	0.00	0.00	0.00	110,709.92	142,426.00	31,716.08	77.73		

Validate | View Errors | PDF | Save | Cancel

Source of Funds Tab: select State Agreement field to reflect zero expenses for the reporting period.

- In the Funds column enter 0.00.
- Click the 'Save' button.
- Click the 'Validate' button to check for errors.

Note: The Zero's shown on the screen are placeholders. Showing the field type (numeric).

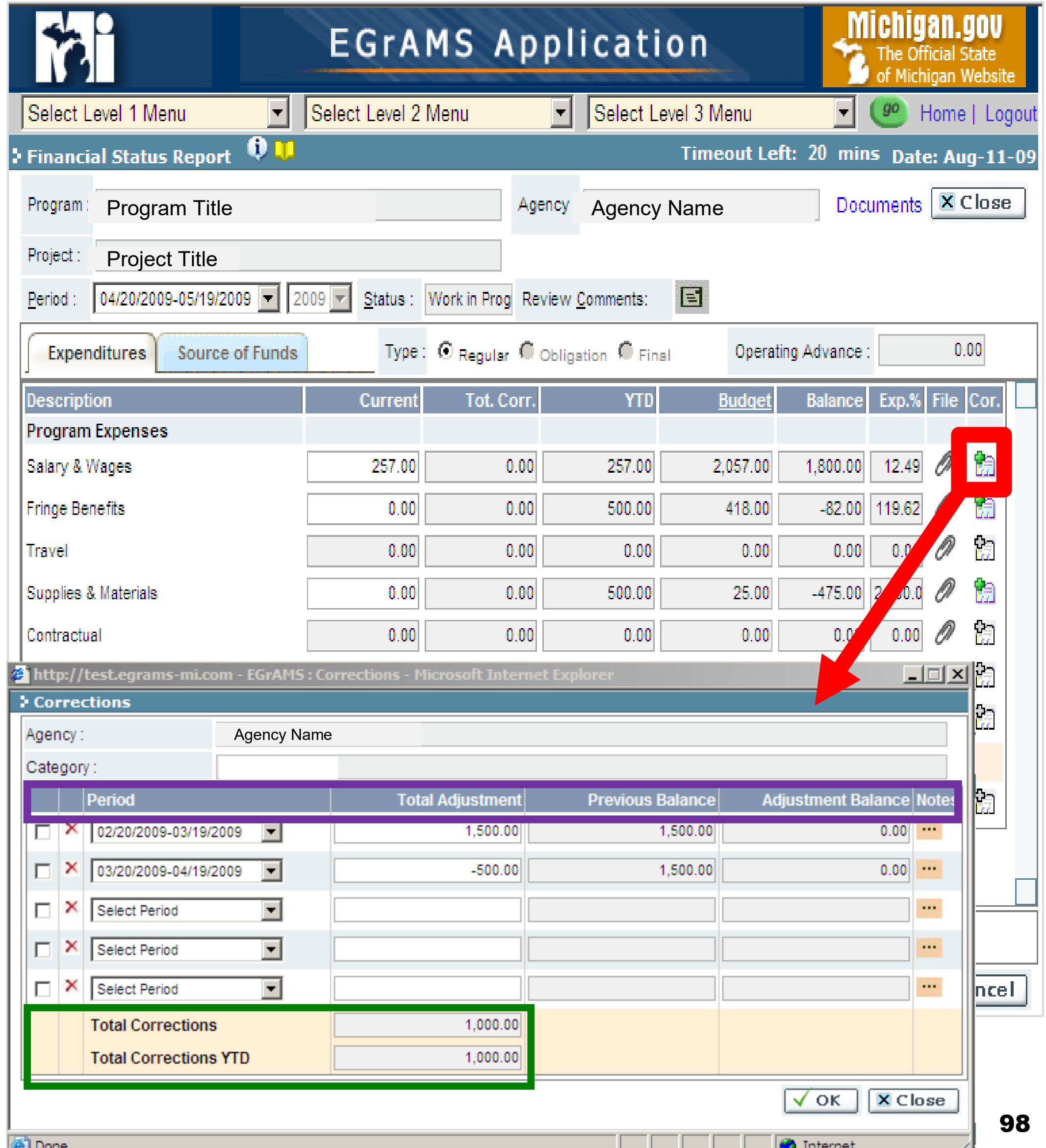
Expenditures Correction to a Prior Period FSR

On the Current FSR:

- Click on the ‘Corrections’ icon for the expense category to correct on the Expenditures tab. System displays correction screen.

The Correction Screen displays:

- **Period** – Select the reporting period of correction.
- **Total Adjustment** – Enter the amount to be corrected.
- **Previous Balance** – View previous balance adjusted.
- **Adjustment Balance** – View adjusted balance.
- **Total Corrections** – View the total correction amount for that period.
- **Total Corrections YTD** – View the total correction amount Year-To-Date.
- Click the ‘OK’ button to close pop-up and ‘Save’ to save changes.
- Click the ‘Close’ button to discard the selections.

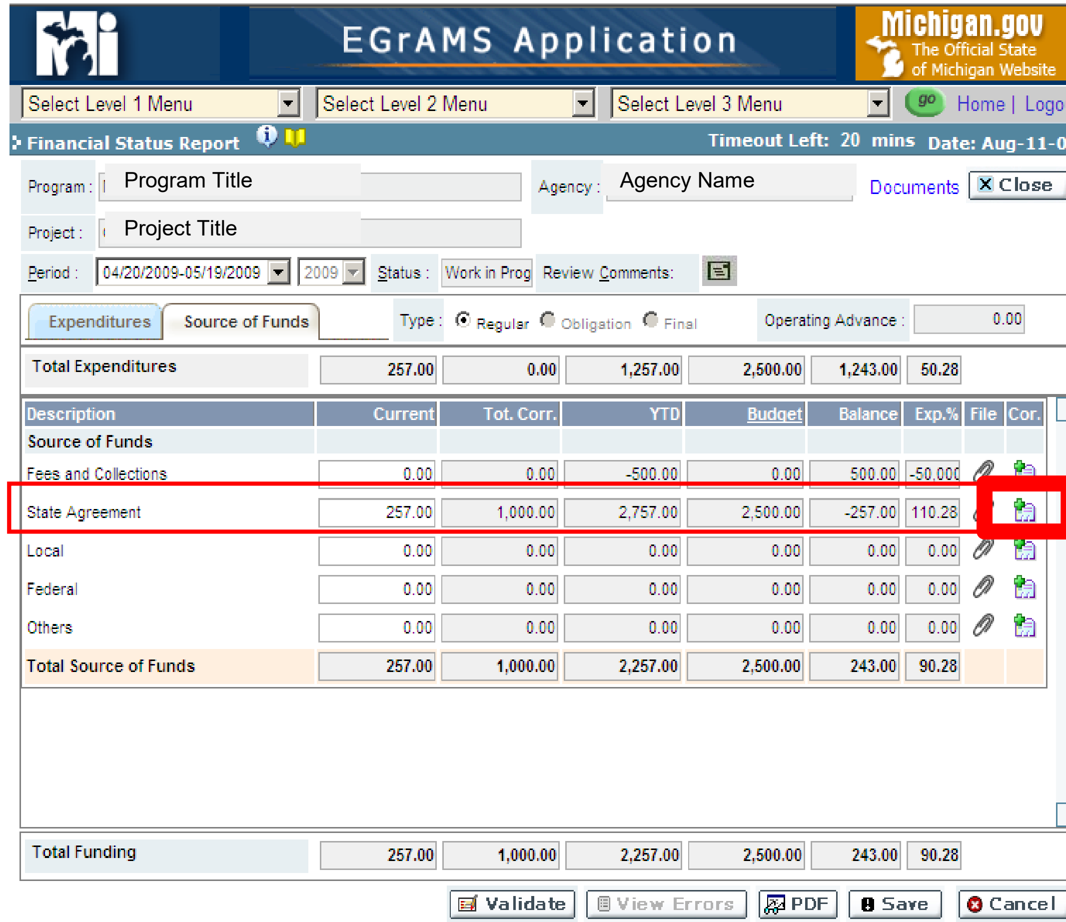


Expenditures Correction to a Prior Period FSR

- After clicking on the 'Save' button, the system will re-generate and now reflects the corrected amount in the Total Corrections Column.
- Click on the **Source of Funds** tab 'Corrections' icon to correct the funds category. System displays correction screen.

Note: Any corrections made in the Expenditures tab for a reporting period also needs to be corrected on the Source of Funds tab, for the same reporting period.

- Click the 'OK' button to save changes.
- **Click the 'Validate' button to check for errors (refer to page 89).**
- Upon Validation, you will receive an error message, if you have not made the corrections to the Source of Funds tab.



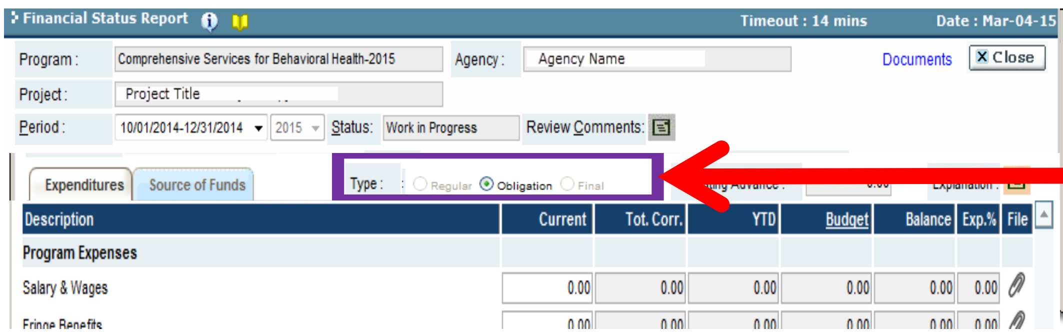
NOTE: The Financial Officer is the **only** Permission Code that will have the Submit checkbox available to submit an FSR.

Special Year-End Financial Status Reports

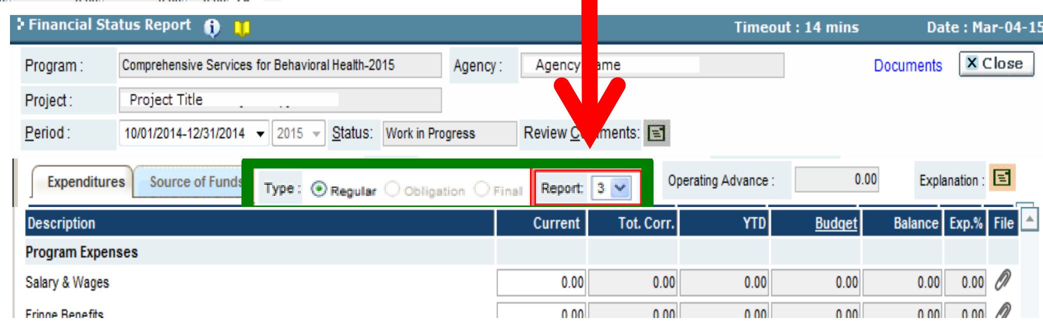
- **Obligation Report** – This report should be an estimate of remaining expenditure for the final agreement period.

- **Last Project Period Report** – This report is a regular report which can be submitted <u>multiple times</u> prior to submitting the “Final” report.

- **Final Report** – This report should be selected when the agency is ready to report the <u>final</u> expenditures.



NOTE: The User will enter the data in these reports similar to a regular FSR. The only difference is the “**Type**.”



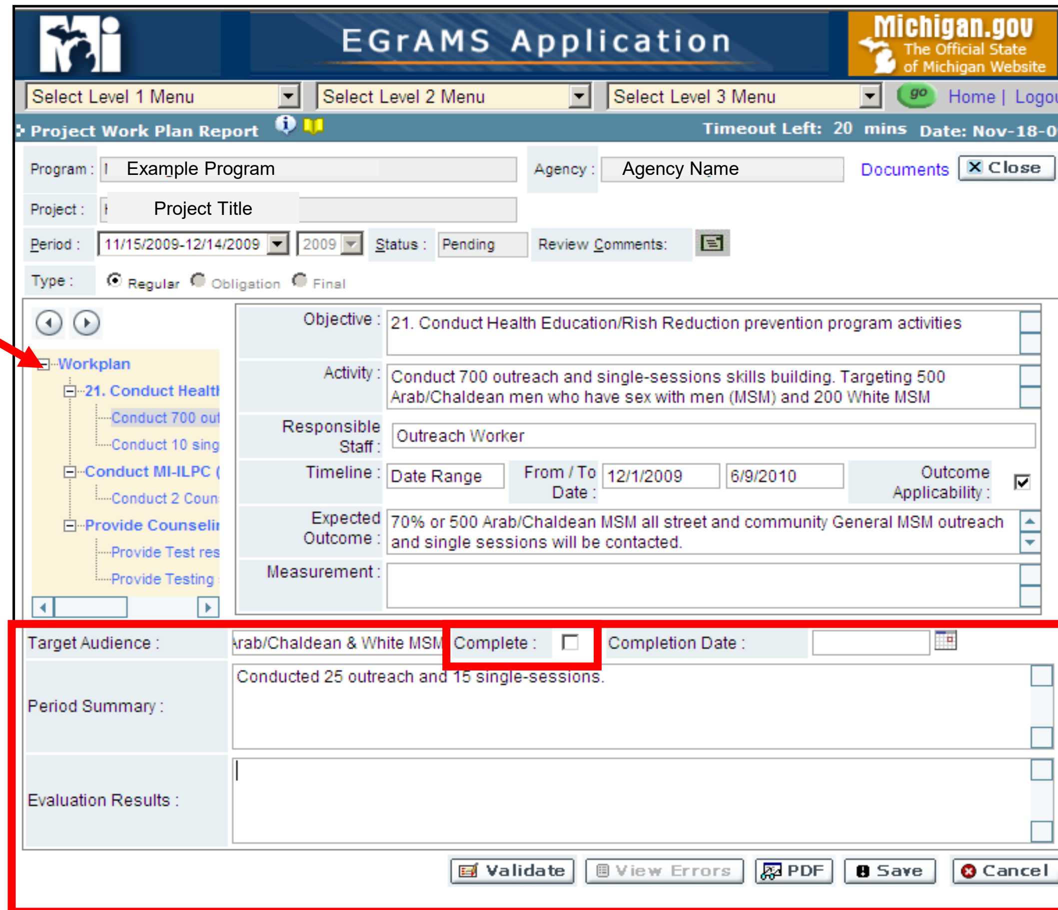
NOTE: The Financial Officer is the <u>**only**</u> Permission Code that will have the Submit checkbox available to submit an FSR.

Quick Links

Work Plan Report

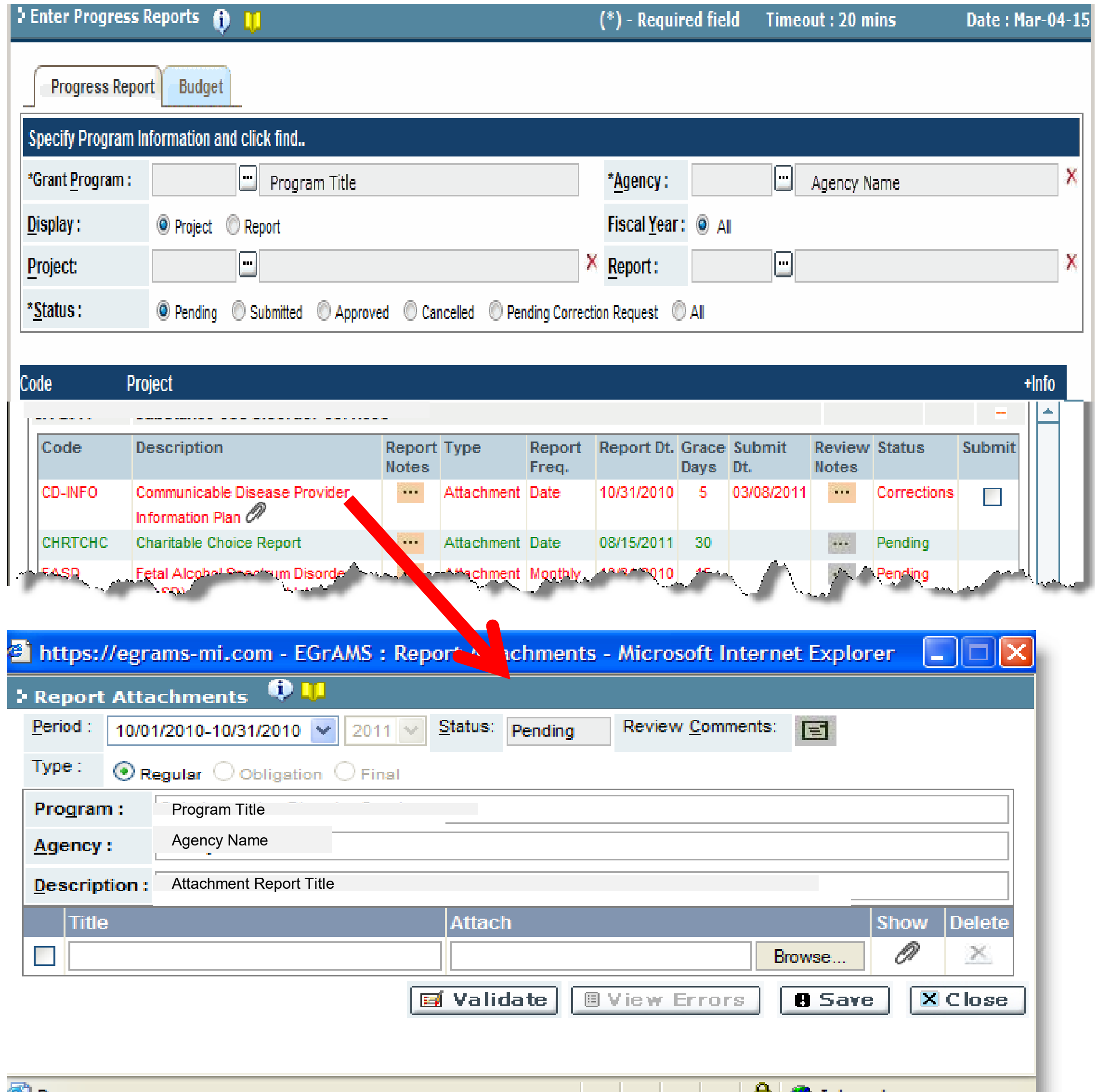
During the application process, Grantees were asked to develop a Work Plan (Statement of Work) that detailed the Agency's Goals and Objectives. Using this information, the system generates a Work Plan Evaluation report. This report allows the Grantee to track and report on the Program's progress towards completing the stated Objectives/Activity(ies) as outlined in the Agreement.

- Navigate through the various objectives/ activities by clicking on the 'Arrow' buttons. Or choose the Objective/Activity by clicking on the activity within the expandable tree directory located on the left side of the screen.
- Move through each Objective to report against each activity. Enter the Target Audience, Performance Summary and Evaluation Results.
  - If an activity has been completed for the **entire grant period**, check the box next to 'Completion' and enter the 'Completion Date' for the Activity.
- Click the 'Save' button to save changes.
- **Click the 'Validate' button to check for errors (refer to page 89).**
- ***NOTE:*** The system will display the selected Objective, Activity, Responsible Staff, and Timeline information as contained in the Agreement's Attachment A – Statement of Work.



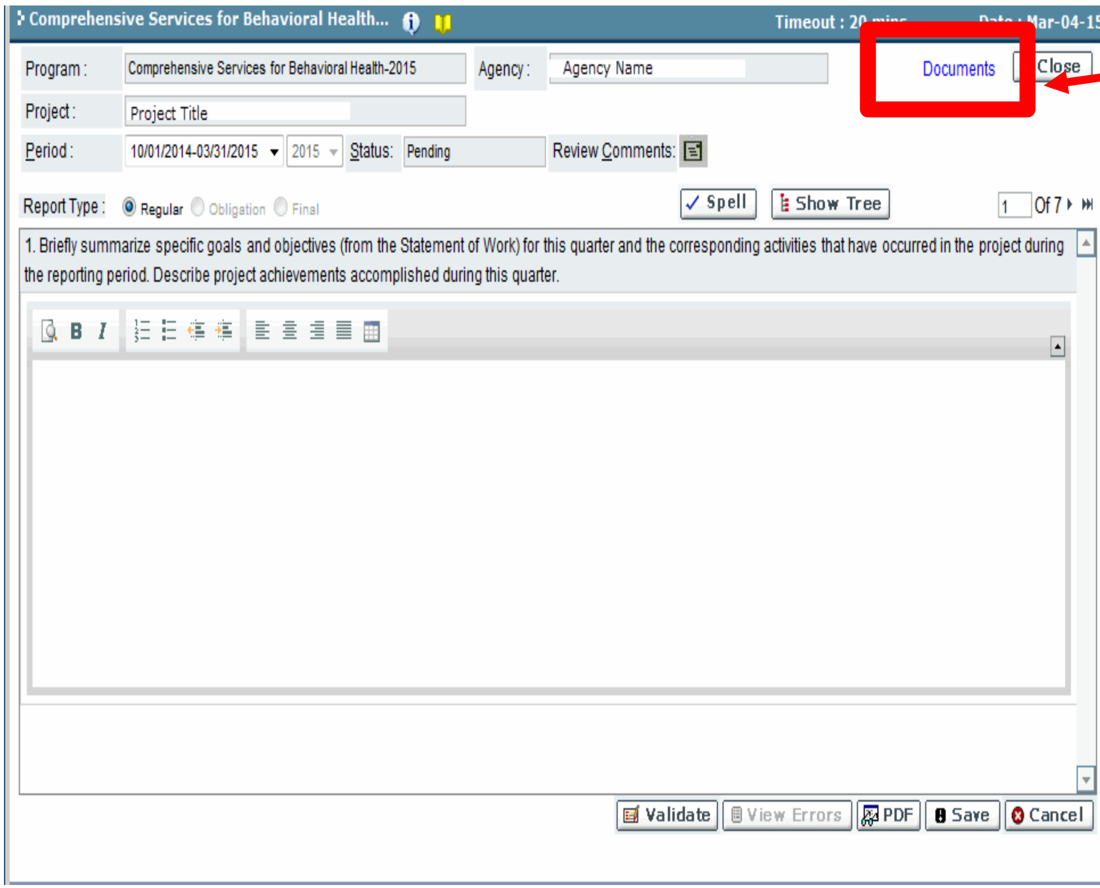
Attachment Reports

- Click on the hyperlink to open the attachment report.
- Enter the ‘Title’ of the report.
- Click the ‘Browse’ button, to locate the file from your local system to be attached.
- Click the ‘Save’ button to save changes.
- Click the ‘Paper Clip’ icon to view the uploaded attachment.
- Click on the ‘Close’ button.
- Submit this report from the Progress Report screen (refer to page 89).
- MDHHS Program Staff will review and approve or reject the report back for Corrections.



Narrative Report

To track the progression of some Projects, MDHHS Program Staff have developed Narrative Progress Reports.



Follow the instructions __before__ completing each report. Instructions can be found in a few locations:

- The 'Documents' hyperlink provides a listing of Report instructions.
- Instructions are listed on the screen within the Report, as shown below.
- Click the 'Information' icon for instructions on how to complete the specific question.

To complete the report:

- Enter or cut and paste the narrative information as requested for the Report.
- Click the 'Save' button to save changes.
- **Click the 'Validate' button to check for errors (refer to page 89).**

Statistical Report

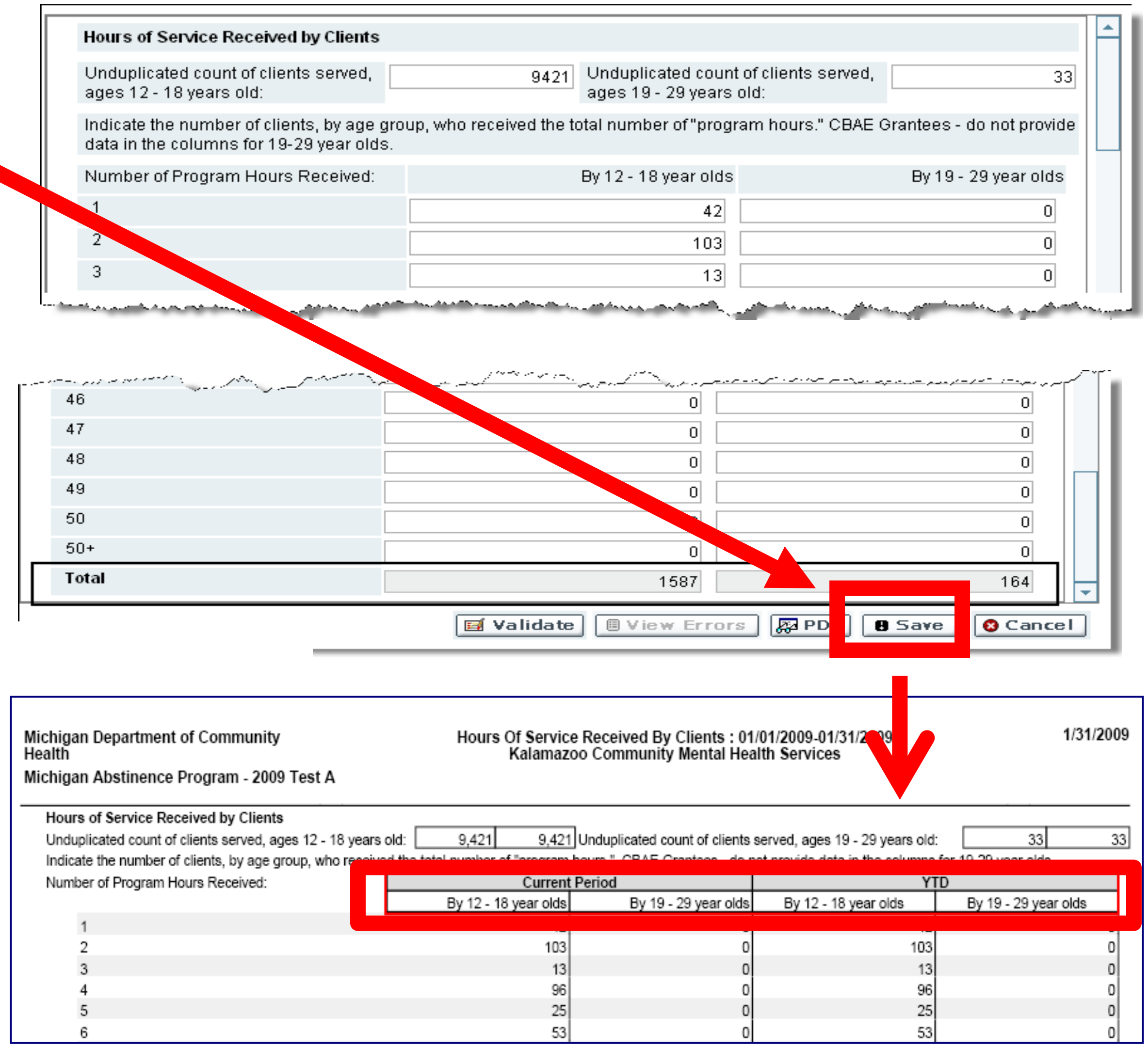
- Enter the data as requested for <u>each</u> report.
- Click the ‘Save’ button to save change.

NOTE: The system will <u>not</u> calculate the totals until the ‘Save’ button is clicked. <u>Each</u> time a change is made to a numeric field, re-click the ‘Save’ button to update the total(s).

- Click the ‘Validate’ button to check for errors (refer to page 89).
- Submit this report from the Progress Report screen (refer to page 91).
- The Report is then reviewed and approved, or rejected for Corrections, by MDHHS Program Staff.

- Click the ‘PDF’ button to view or print the report.

  Note: The printed report will show the current period <u>and</u> the Year-To-Date (YTD) totals, for the given Reporting period.



Questions?

Contact the EGrAMS Help Desk:
MDHHS-EGRAMS-HELP@michigan.gov
or (517)335-3359