

**Beginning Grant Management
Grant Stage 4: Implementation
User Guide**

This user guide will provide instructions on how to navigate through the grant implementation stage.

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Grant Stage – Implementation

Grant Implementation begins the post-award stage of grant management. You will automatically move into the implementation stage when you create your first tasks. Tasks or scheduled reports may be created to help manage your post-award reporting requirements.

Scheduled reports may consist of reports submitted to the Grantor on a regular cadence, such as quarterly performance reports and quarterly financial reports.

Miscellaneous Tasks may be created to upload any additional documents pertinent to the post-award stage, such as approval documents or on site monitoring documents.

Schedule a Report:

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contr

Active Grants

FD3886: FY2018 Stage: Grant Awarded Awarded: \$12,000.00 Match: \$4,000.00

FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Available Actions

- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to close this grant
- I would like to view/manage my contract & account details
- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant
- I would like to create/manage a program for solicitation for this grant

Select “Schedule New Report”:

Schedule Report

Demo Playground Project

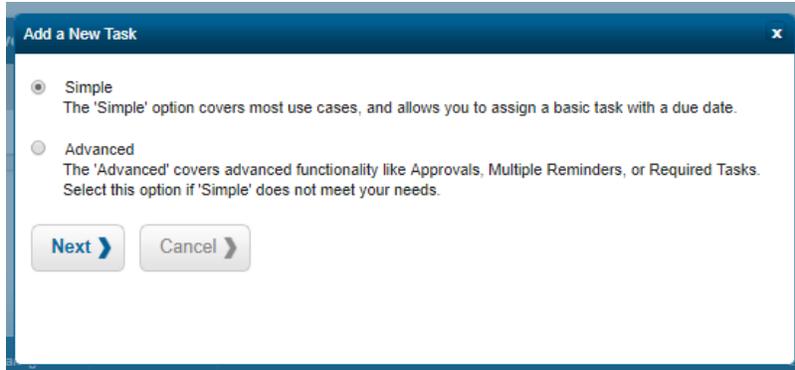
FD3886 KaBOOM!: Creative Play Grants: Imagination Playground - FY 2018

Report Name	Assigned To	Due	Reminder	Download Files	Done
No reports assigned at this time.					

Done

You will be prompted to select a Simple or Advanced task.

- Select “Simple” for report that does not require approval or does not re-occur
- Select “Advanced” for reports that require approval or re-occur



Complete the required fields, marked with a red asterisk.

Once you have created a complete schedule of reporting required for the grant, you can complete tasks as they become due by selecting the “Done” checkbox for that task:

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Project ID established	FD3886: FY2018	Implementation	R. Baird	11/30/2018			<input type="checkbox"/>
TBA Submitted	FD3886: FY2018	Implementation	R. Baird	11/30/2018			<input type="checkbox"/>
Progress Report	FD3886: FY2018	Implementation	J. Brayer	12/13/2018			<input checked="" type="checkbox"/>

Below the table are three buttons: "Add Task", "Task Report", and "Refresh".

How to Add a Task

Within a project, you can assign two different types of tasks: Simple and Advanced. You can use one or both to assist in the quarterly finance and compliance reports required by Federal Grants awarded.

- **Simple** allows you to assign a basic task with a due date
- **Advanced** provides more functionalities such as approval sequences, frequent reminders, and required tasks.

At the bottom of the project dashboard page, click on “+Add Task”:

The screenshot shows a project dashboard interface. At the top, there are three tabs: 'Pending Tasks', 'Completed Tasks', and 'Approval History'. Below the tabs is a table with the following data:

Task Name	Grant	Stage	Assigned To	Due	Reminder	File(s)	Done
Contract Close	ORG0121-AS: FY2018	Funding Allocated	A. Ibarra	06/30/2019			

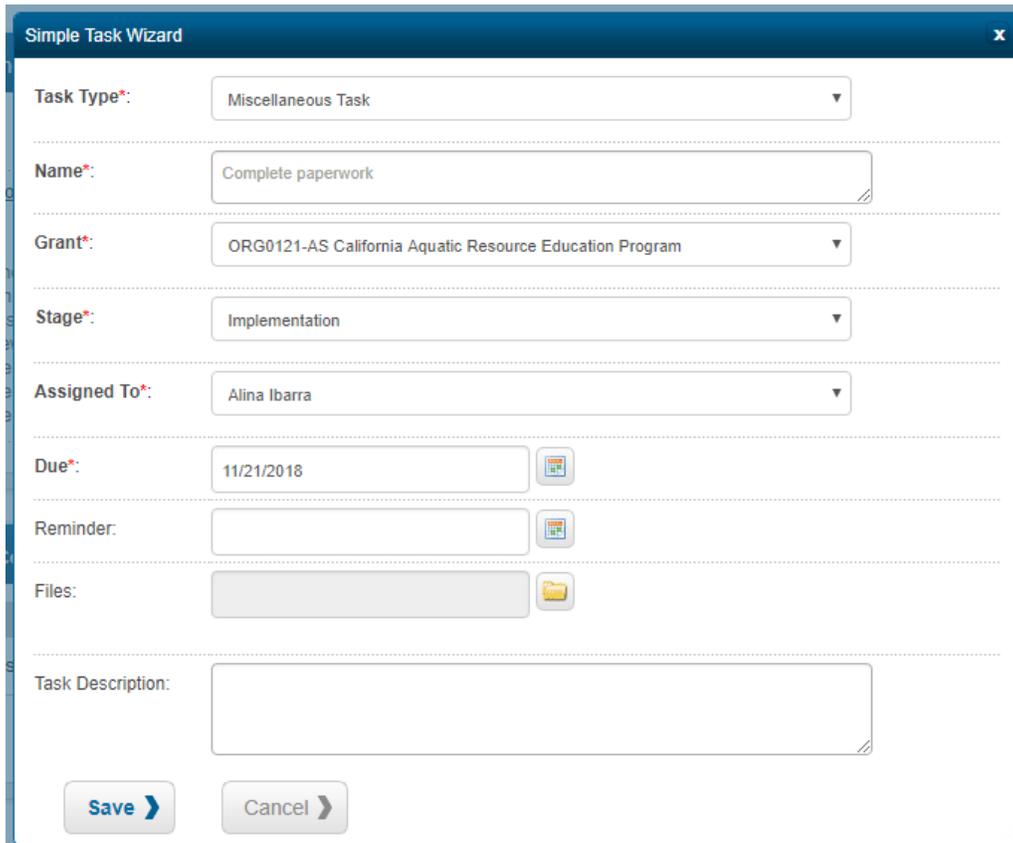
Below the table, there are three buttons: '+ Add Task' (highlighted with a red box), 'Task Report', and 'Refresh'.

Select if the task will be Simple or Advanced. Click on “Cancel” to and then “+Add Task” to restart the sequence if you determine you need a different task type.

Simple Tasks

Simple tasks can be assigned to a user or user group for completion. If a user group is assigned, anyone from the group can complete the task.

Complete all required fields, marked with a red asterisk. Assign the task to the person who will be responsible for ensuring the task is complete:



The screenshot shows a 'Simple Task Wizard' window with the following fields and values:

- Task Type*:** Miscellaneous Task
- Name*:** Complete paperwork
- Grant*:** ORG0121-AS California Aquatic Resource Education Program
- Stage*:** Implementation
- Assigned To*:** Alina Ibarra
- Due*:** 11/21/2018
- Reminder:** (empty)
- Files:** (empty)
- Task Description:** (empty)

At the bottom of the form are two buttons: 'Save' and 'Cancel'.

Click "Save" and the task will appear in the Pending Tasks list.

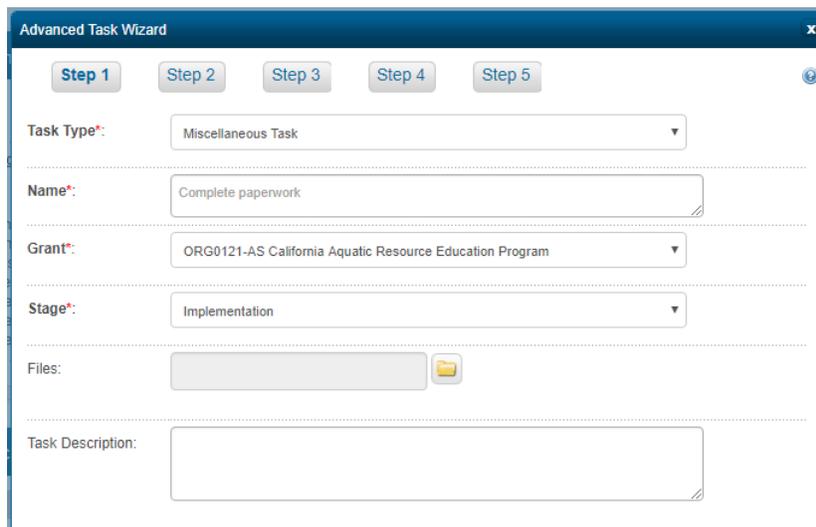
Advanced Tasks

Advanced tasks provide more functionalities, such as being set as required before the grant can be moved to the next stage, setting a sequence of approval, or setting recurrence and frequency.

If there are scheduled reports to submit regularly, you will want to use the Advanced Task option. This provides the option to repeat the task, send reminders, and can be customized.

A step-by-step guide to creating the task can be activated by clicking on the question mark in the top left corner. You must click on the Steps at the top to continue the step-by-step guide.

In Step 1, complete all required fields, marked with a red asterisk:



The screenshot shows the 'Advanced Task Wizard' window, Step 1. At the top, there are five tabs: Step 1 (selected), Step 2, Step 3, Step 4, and Step 5. The form contains the following fields:

- Task Type*:** A dropdown menu with 'Miscellaneous Task' selected.
- Name*:** A text input field containing 'Complete paperwork'.
- Grant*:** A dropdown menu with 'ORG0121-AS California Aquatic Resource Education Program' selected.
- Stage*:** A dropdown menu with 'Implementation' selected.
- Files:** A text input field with a folder icon to its right.
- Task Description:** A large text area for entering details.

In Step 2, specify if the task will be standard, which can be approved by a user or anyone in a user group, or sequential, which must be approved by a specific order of people before the task can be completed.

Click "Required" if the task must be completed before the grant or award can be moved to the next stage:

Advanced Task Wizard

Step 1 Step 2 Step 3 Step 4 Step 5

Task Options

Approval

Standard
'Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.

Sequential
'Sequential' approvals are those that require each approval group member to approve in a specific order, one after another.

Required
The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.

In Step 3, the Assigned To box should be the person who will ultimately complete the task. If you chose Standard Approval in Step 2, then the approval can be performed by anyone in the User Group. If you chose Sequential Approval in Step 2, the task will move through the person or group set as Designated for Approval before it can be completed by the person set as Assigned To:

Advanced Task Wizard

Step 1 Step 2 Step 3 Step 4 Step 5

Assigned To*:

Alina Ibarra

Designated for Approval*:

User
Choose a user that will be designated as approver

Select Department

Select User

User Group
Choose a user group that will be designated for approval. The group is based off Approval Type in previous step.

USFWS

To learn how to create a User Group, refer to the Approval Groups section of this manual.

In Step 4, set the Due Date and a Reminder Date:

In Step 5, you can select if the task will repeat or happen only once. Select “Repeat” if this task is meant to be completed more than once. You can select weekly or monthly frequency, when the task will be due, and the frequency of task reminders:

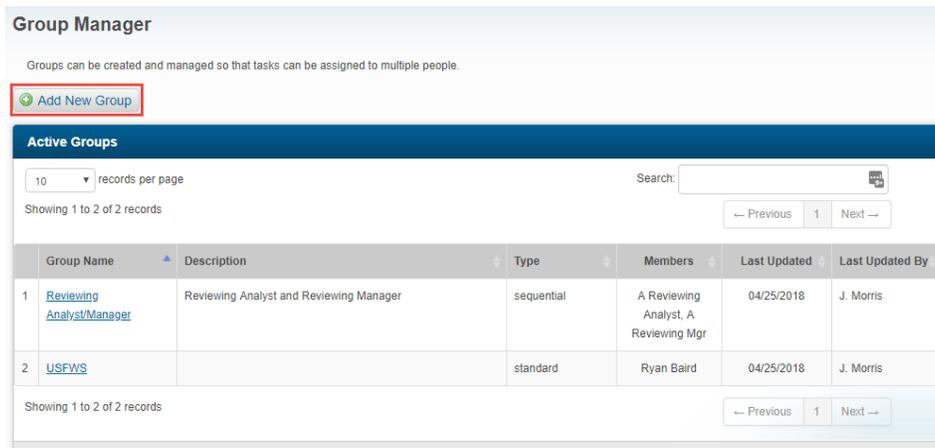
Click “Save” and the task will appear in the Pending Tasks list.

Approval Groups

To create or edit a group that can be used in the task approval process, go to the Administration tab and select Group Manager:



Click on “+Add New Group” to create a new user group or the Group Name to edit the group:



Complete the required fields, marked by a red asterisk, including the group name and group type (as a standard group or sequential group). Select the group users by clicking on a Department, then a user, and the single right arrow. Click on the right double arrows to move all of the users within the department into the User Group.

Use the up and down arrows to set the sequence of approvers. If Sequential, the task will move from the top user to the bottom user. If Standard, anyone in the group may approve.

Remove users by clicking on their name from the Selected Users column and clicking on the single left arrow. Clicking on the double left arrow will remove all users from the Selected Users column:

Add New Group

Group Name: 1

Description:

Type: Standard Sequential 2

Select from Department and Users

Select one or more departments on the left to narrow the list of users on the right.

Departments: 3

- Advanced Programs
- Miscellaneous
- NOAA
- NOAA Section 6
- Non-Traditional Section 6**
- PR (Pittman-Robertson)
- SFRA (Sport Fish Restoration Act)
- SWG (State Wildlife Grant)

Users: 4

- Lisa Bays (Lisa.Bays@wildlife.ca.gov)
- Mike McCormick (Michael.McCormick@wildlife.ca.gov)
- Nicole Nelson (nicole.nelson@wildlife.ca.gov)
- Ryan Baird (donotreply@ecivis.com)**
- Steve Wong (Steve.Wong@wildlife.ca.gov)

Selected Users: 5

- Jason Brayer (jbrayer@ecivis.com)

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Click "Save" and your new approval group will appear in the list of Active Groups.

When creating tasks, you can assign tasks to the group of your choice. The Group will also appear as an option in the list of User Groups in Designated for Approval lists when creating tasks.

Group Manager

Groups can be created and managed so that tasks can be assigned to multiple people.

Active Groups

10 records per page

Showing 1 to 3 of 3 records

Group Name	Description	Type	Members	Last Updated	Last Updated By
1 Review Applications	Applications must be approved by the following users before submission	sequential	Ryan Baird, Nikita Dudley, Alina Ibarra	11/27/2018	J. Brayer
2 Reviewing Analyst/Manager	Reviewing Analyst and Reviewing Manager	sequential	A Reviewing Analyst, A Reviewing Mgr	04/25/2018	J. Morris

Edit the Award

If there was an error made when entering award information, this can be corrected by clicking on the Grant Lifecycle tab from the Project Dashboard.

Project Dashboard: AZ PSN FY2018

Department: Testing
Project Period: 10/01/2018 - 09/30/2021

[Project Options](#)

Overview | Documents | **Grant Lifecycle** | Goals & Metrics | Budgets | Contracts & Accounts | Spending | History

Active Grants  

US5688 Project Safe Neighborhoods.(PSN) - FY 2018

Project Team  

A. Haney (Lead) Program Manager

Stage: Grant Awarded Awarded: \$1,500,000.00 * Match: \$0.00

Available Actions

- I would like to access details of this grant
- I would like to request an account setup
- I am ready to schedule my report

To correct or edit any errors, go to the Grant Lifecycle tab and click on the pencil icon next to the grant you need to edit:

Grant Lifecycle Report
CAEP R1 - 36008902045028 FY2018

ORG0121-AS California Aquatic Resource Education Program							
Stage	Completed On	Completed By	Files	View/Edit	Last Updated On	Last Updated By	Notes
Funding Allocated	08/03/2018	J. Brayer					

You can edit the award information, such as notification date, amount awarded, match type, contract start and end date, and if funds are available for pass-through awards.

Award Adjustment/Award Amendment

If you receive a grant notification or adjustment notification that indicates a change to your award, you will want to record this as an amendment. Go to the Project Dashboard and select the Grant Adjustment Notice option from the radio buttons:

Project Dashboard: DEMO Project
Department: Advanced Programs

Project Options

Overview Documents Grant Lifecycle Goals & Metrics Budgets Contracts & Accounts Spending History

Active Grants  

ORG0173: FY2008 Stage: Grant Awarded Awarded: \$25,000.00 Match: \$5,000.00 Project Team  

ORG0173 Landowner Incentive Program Tier 2 Riparian Project Development R. Baird (Lead) asd

J. Brayer Director of Im...

Available Actions

- I would like to request an account setup
- I am ready to schedule my report
- This grant does not require a report
- I have received a grant adjustment notice and need to amend my grant agreement
- I am ready to close this grant
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- I would like to create/manage goals and metrics for this grant
- I would like to create/manage a budget for this grant
- I would like to create/manage a program for solicitation for this grant

A training video on how to complete the Grant Amendment form can be accessed by clicking on the question mark located in the top right corner.

Grant Status - Grant Amendment 

AZ PSN FY2018

Complete Status Form

Grant: US5688 Project Safe Neighborhoods (PSN) - FY 2018

Internal Grant ID:

Internal Grant Name:

Do you consider this a competitive grant?: Yes

Amendment Type*:

Specify the award component that has been amended and provide the date that the adjustment notification was received:

Grant Status - Grant Amendment

DEMO Project

Complete Status Form

Grant: ORG0173 Landowner Incentive Program Tier 2 Riparian Project Development

Internal Grant ID:

Internal Grant Name:

Do you consider this a competitive grant?: Yes

Amendment Type*: Award Amount

Award Notification Date*:

Adjustment Notification Date*:

Select Amendment Type:
Award Amount
Contract Extension
Budget
Scope of Work
Other (specify in notes)

If the Award Amount has been adjusted, the difference of the old and new amount will be recorded in the Award Adjustment field. For example, if the original award amount was \$20,000 and you received notification that the total award amount was now \$25,000, then the Award Adjustment is \$5,000. The new total award amount will be reflected in the Adjusted Total Award field (in blue font):

Award Adjustment \$*: 5,000.00

Adjusted Total Award \$*: 25,000.00

Match Required: Yes

Match Type*: In-Kind

Cash Match \$: 0.00

In-Kind Value*: 5,000.00

If you are receiving less, simply type in a dash before the Award Adjustment, and it will subtract this amount from the award amount (example: -5,000). The new total award amount will be reflected in the Adjusted Total Award field (in blue font):

Award Adjustment \$*: -5,000.00

Adjusted Total Award \$*: 15,000.00

Match Required: Yes

Match Type*: In-Kind

Leave a brief summary of the Amendment in the Grant Amendment Notes. You can also upload the notification and any notification documents on the bottom of the form:

Award Type: Advance Payment Reimbursement

DUNS Number: _____

Grantor Contract Number:

Grant Amendment Notes*:

We are receiving an additional 5,000 to support the new branch.

Click "Save." The Amendment can be seen on the Grant Lifecycle tab of the Project Dashboard. The previous version of the grant is viewable only. If you need to edit the grant, this can be done on the latest version of the grant.

Grant Lifecycle Report
DEMO Project

ORG0173 Landowner Incentive Program Tier 2 Riparian Project Development							
Stage	Completed On	Completed By	Files	View/Edit	Last Updated On	Last Updated By	Notes
Grant Awarded	11/19/2018	J. Brayer			11/28/2018	J. Brayer	
Grant Amendment	11/28/2018	J. Brayer					