Beginning Grant Management
Grant Stage 4: Implementation
User Guide

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

Sections in this user guide include:

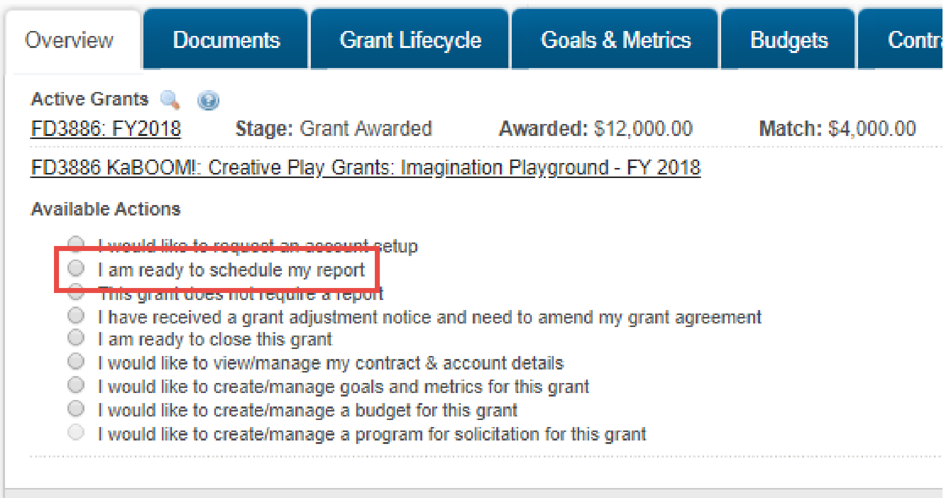
Grant Stage – Implementation

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.

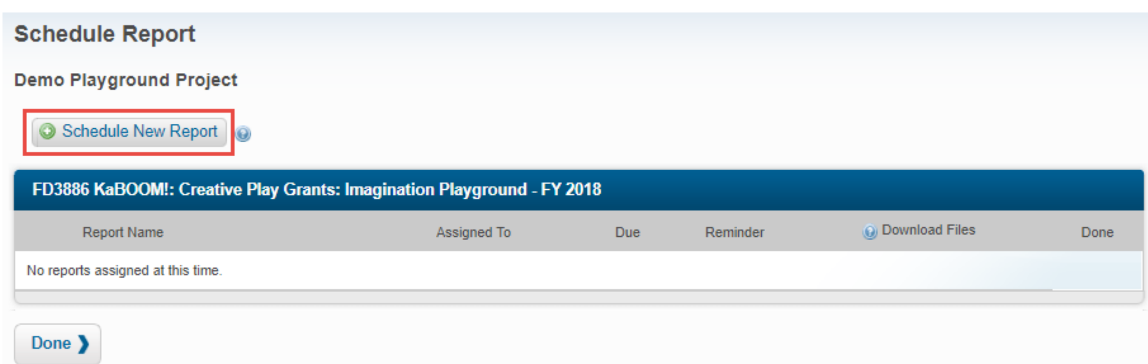
Scheduled reports may consist of reports submitted to the Grantor on a regular cadence, such as quarterly performance reports and quarterly financial reports.

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:

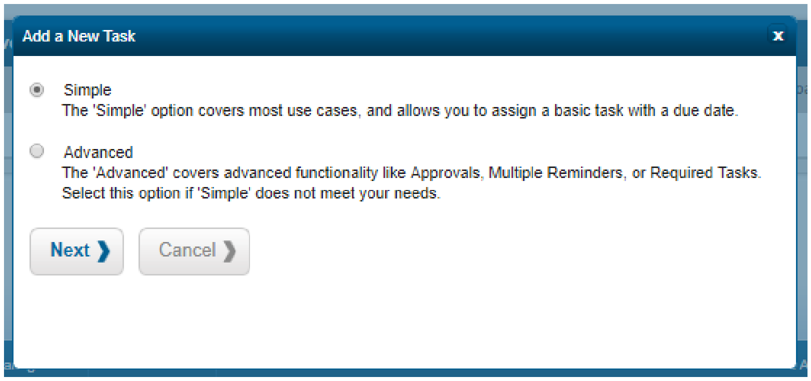


Select “Schedule New Report”:



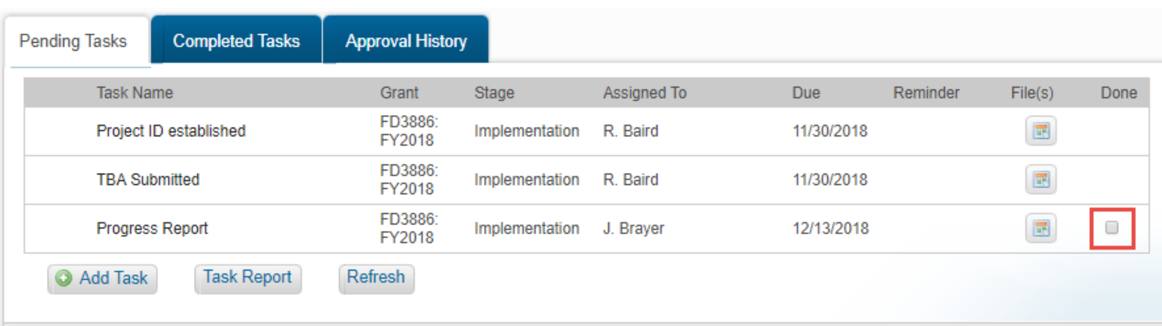
You will be prompted to select a Simple or Advanced task.

- 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:

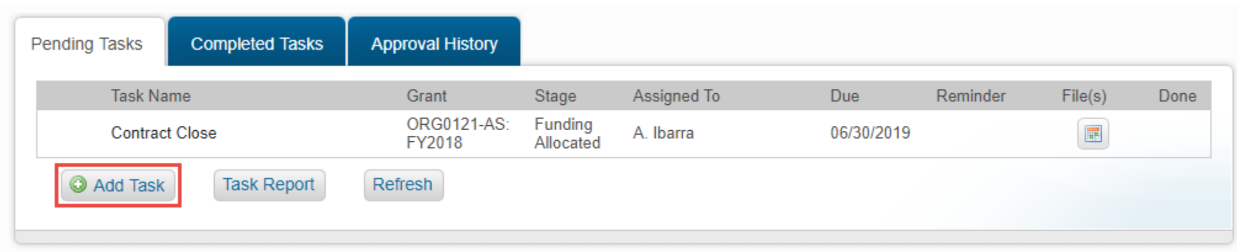


How to Add a Task

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”:

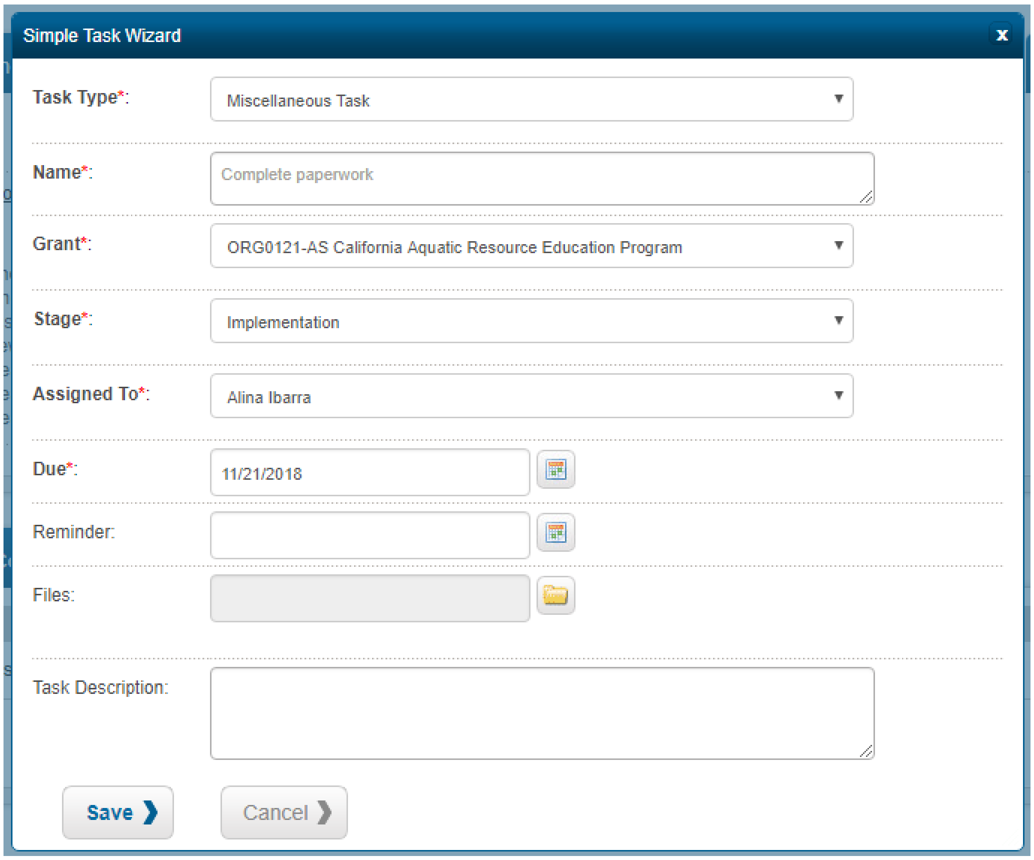


Select if the task will be Simple or Advanced. Click on “Cancel” to and then “+Add Task” to restart the sequence if you determine you need a different task type.

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:



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

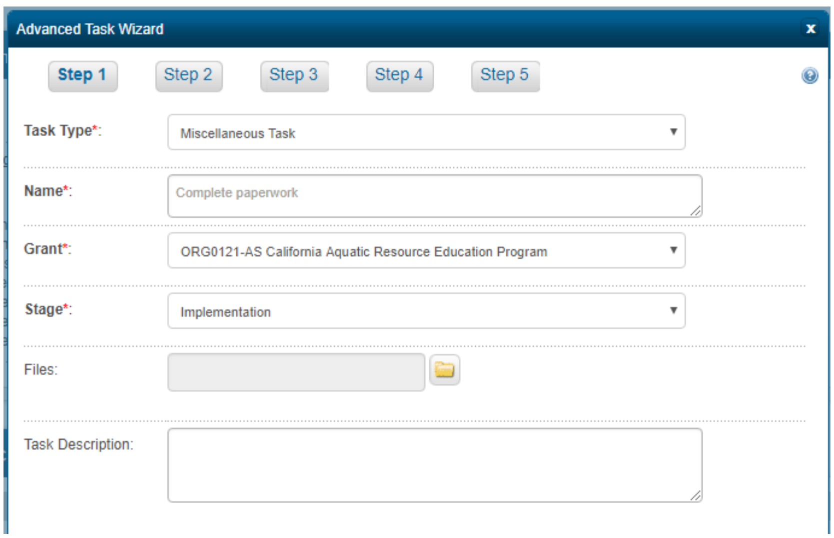
Advanced Tasks

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.

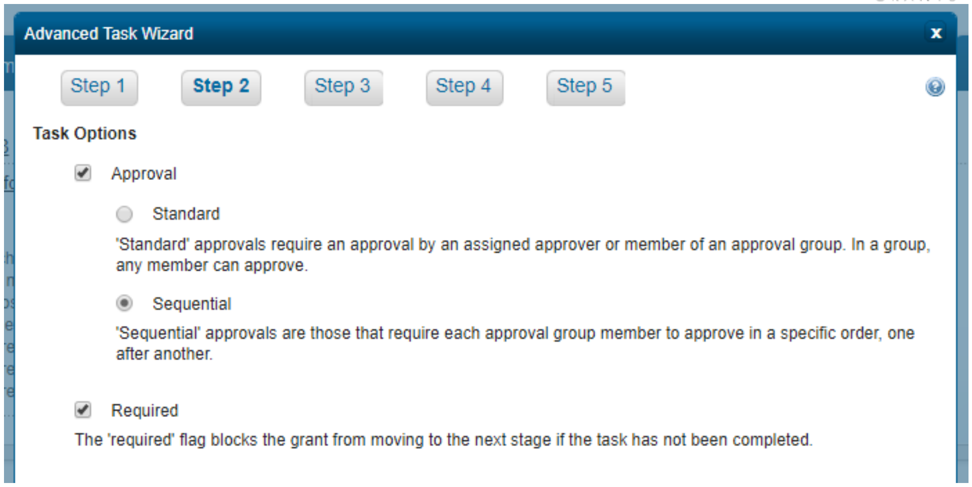
A step-by-step guide to creating the task can be activated by clicking on the question mark in the top left corner. You must click on the Steps at the top to continue the step-by-step guide.

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

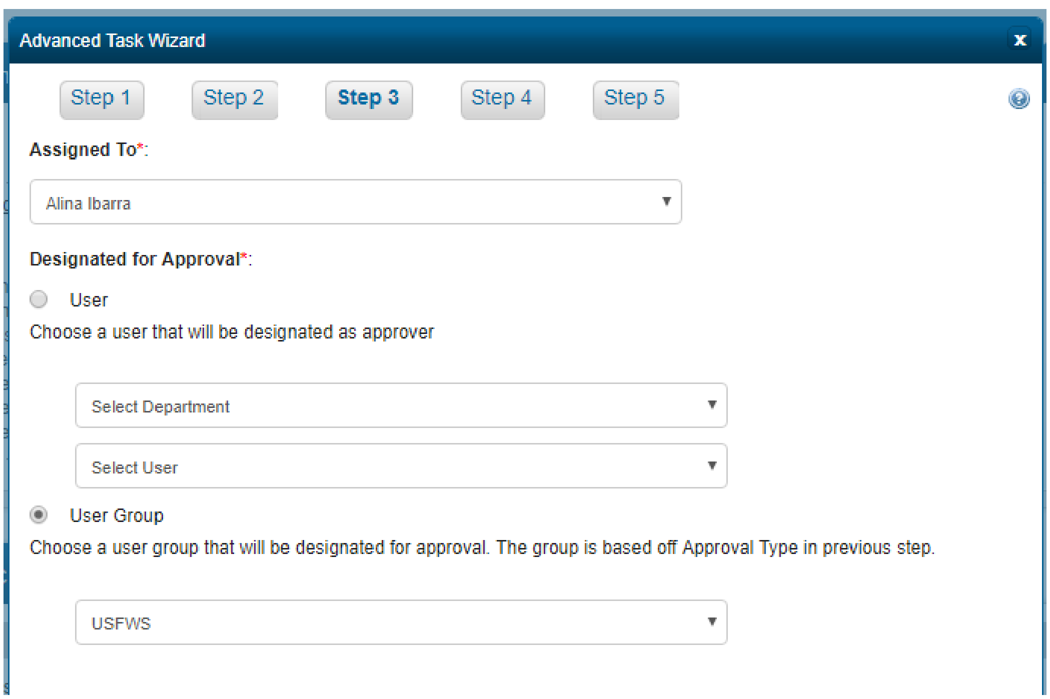


In Step 2, specify if the task will be standard, which can be approved by a user or anyone in a user group, or sequential, which must be approved by a specific order of people before the task can be completed.

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

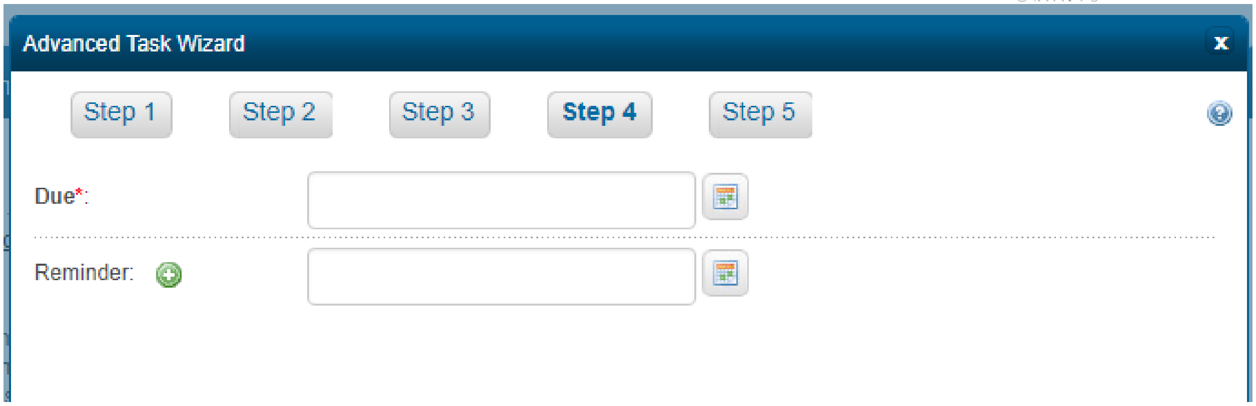


In Step 3, the Assigned To box should be the person who will ultimately complete the task. If you chose Standard Approval in Step 2, then the approval can be performed by anyone in the User Group. If you chose Sequential Approval in Step 2, the task will move through the person or group set as Designated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

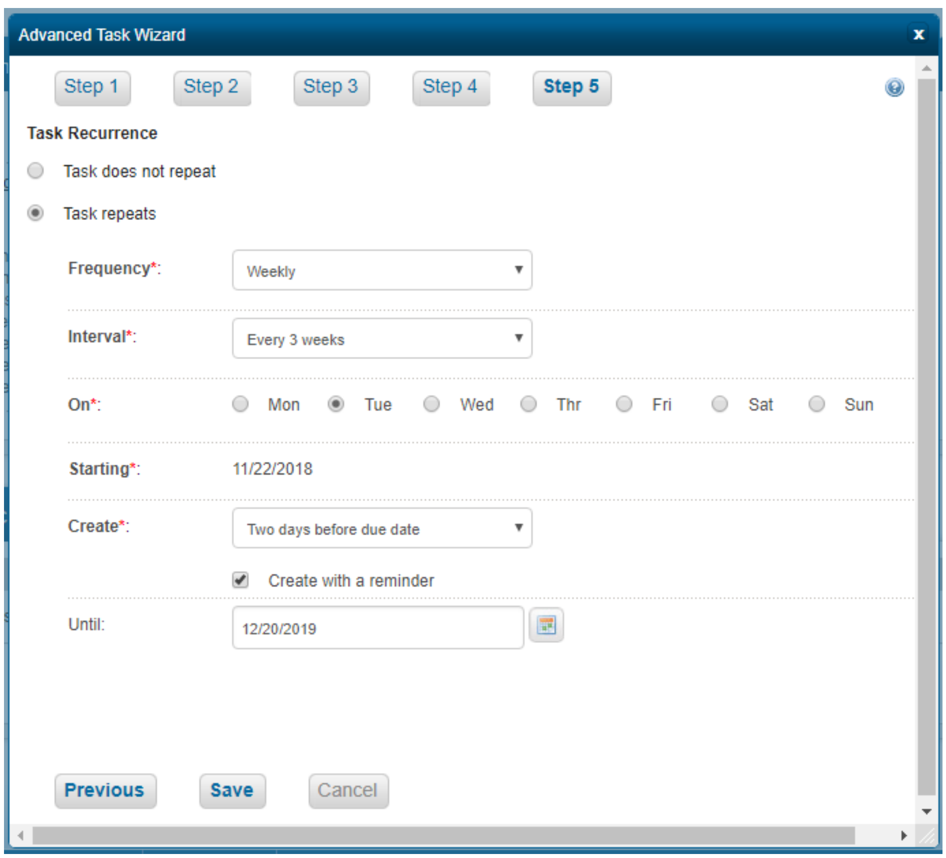


To learn how to create a User Group, refer to the Approval Groups section of this manual.

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:

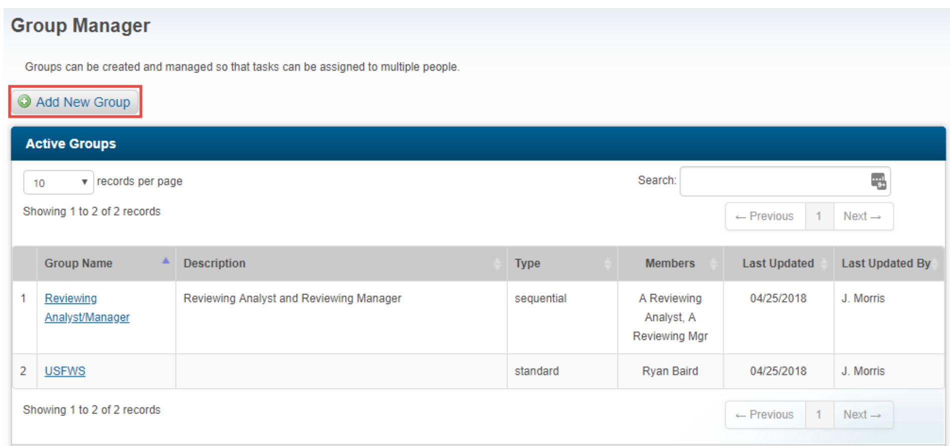


Click “Save” and the task will appear in the Pending Tasks list.

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:

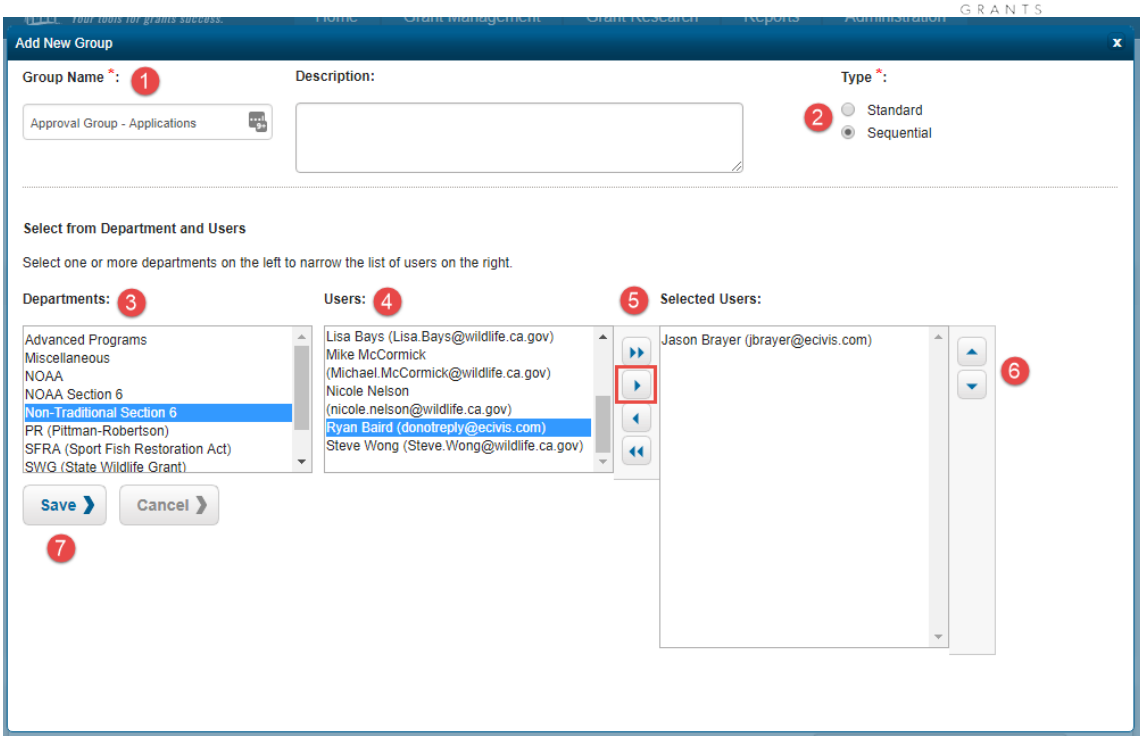
Click on "+Add New Group" to create a new user group or the Group Name to edit the group:



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.

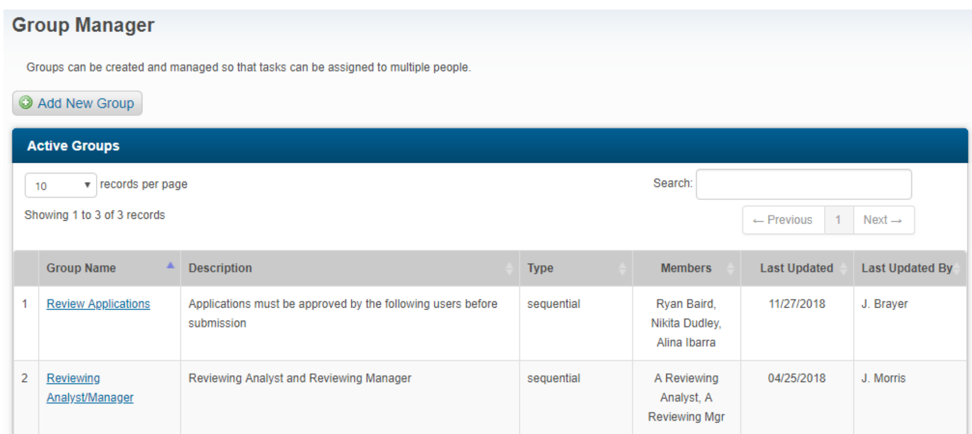
Use the up and down arrows to set the sequence of approvers. If Sequential, the task will move from the top user to the bottom user. If Standard, anyone in the group may approve.

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:



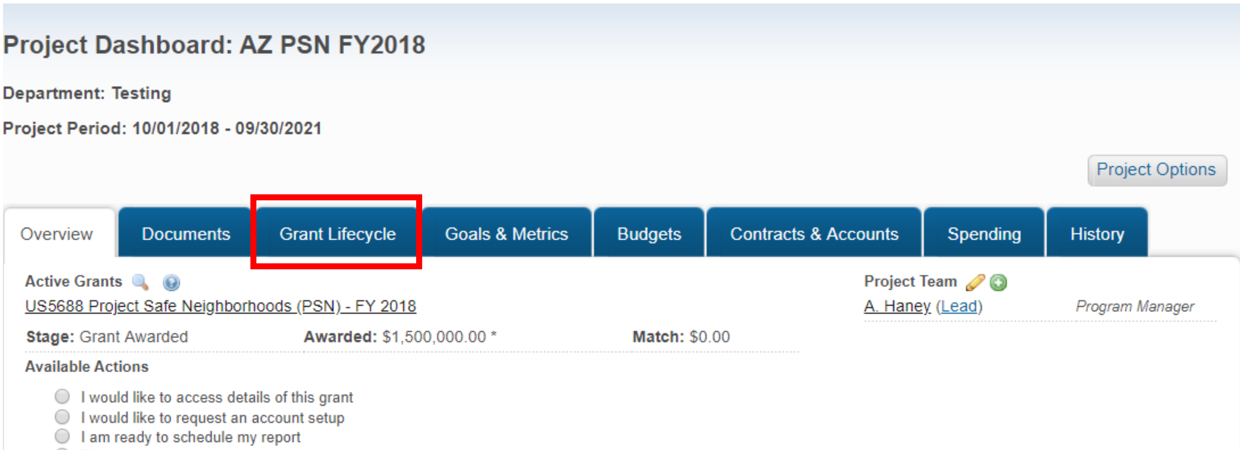
Click “Save” and your new approval group will appear in the list of Active Groups.

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.

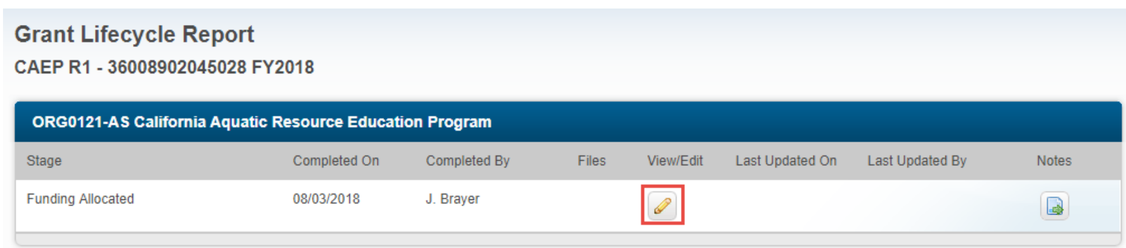


Edit the Award

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.



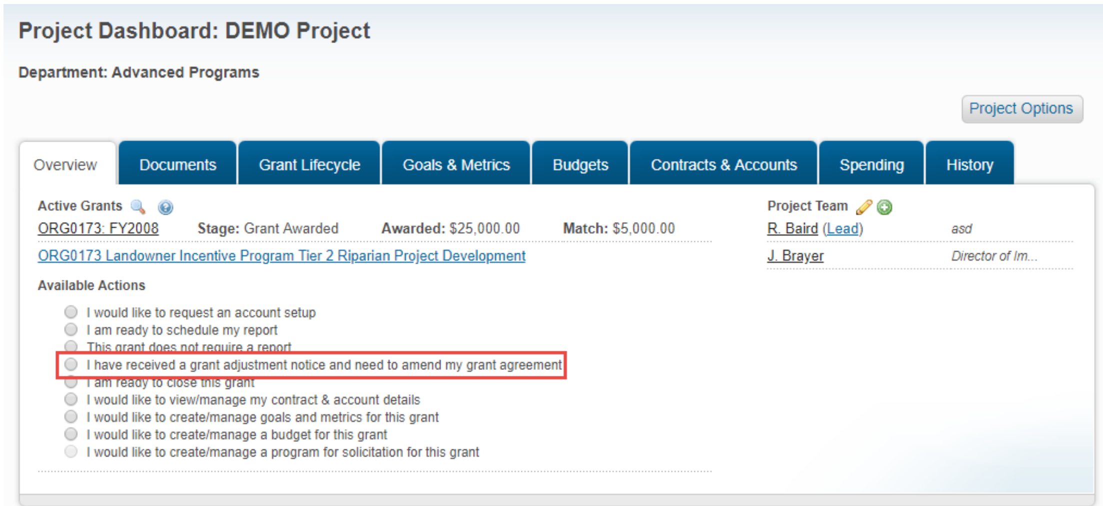
To correct or edit any errors, go to the Grant Lifecycle tab and click on the pencil icon next to the grant you need to edit:



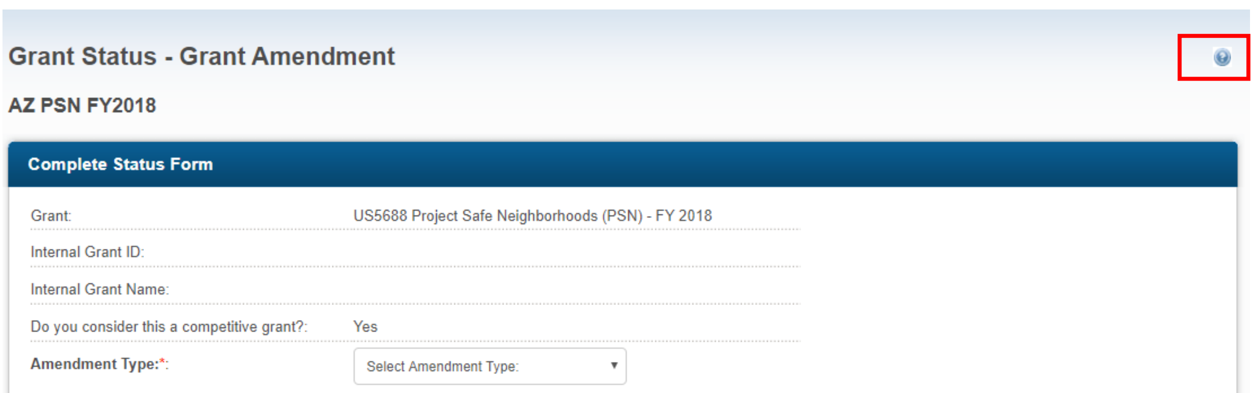
You can edit the award information, such as notification date, amount awarded, match type, contract start and end date, and if funds are available for pass-through awards.

Award Adjustment/Award Amendment

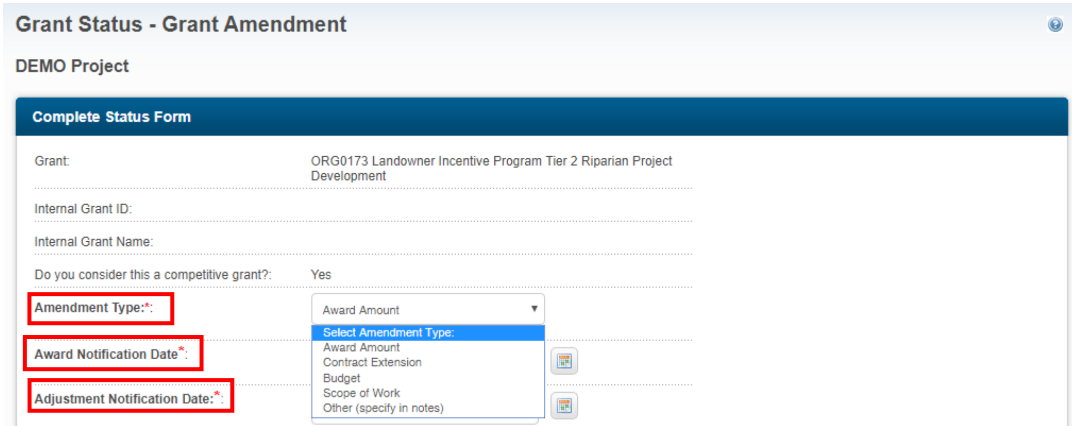
If you receive a grant notification or adjustment notification that indicates a change to your award, you will want to record this as an amendment. Go to the Project Dashboard and select the Grant Adjustment Notice option from the radio buttons:



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.

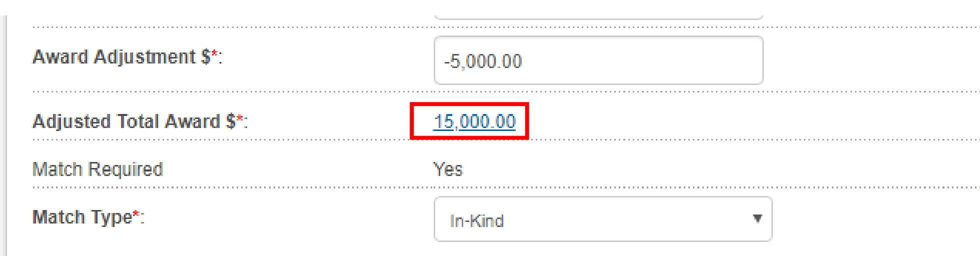


Specify the award component that has been amended and provide the date that the adjustment notification was received:

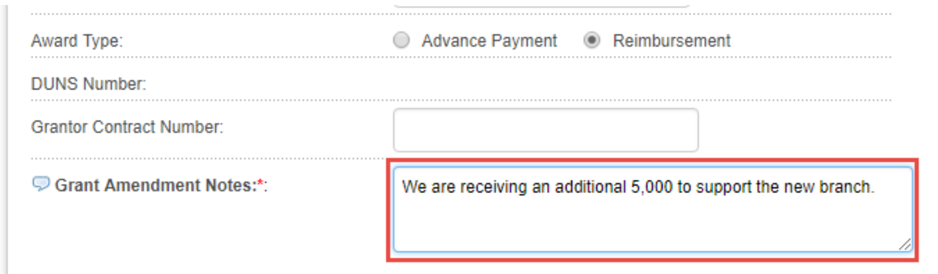


If the Award Amount has been adjusted, the difference of the old and new amount will be recorded in the Award Adjustment field. For example, if the original award amount was $20,000 and you received notification that the total award amount was now $25,000, then the Award Adjustment is $5,000. The new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

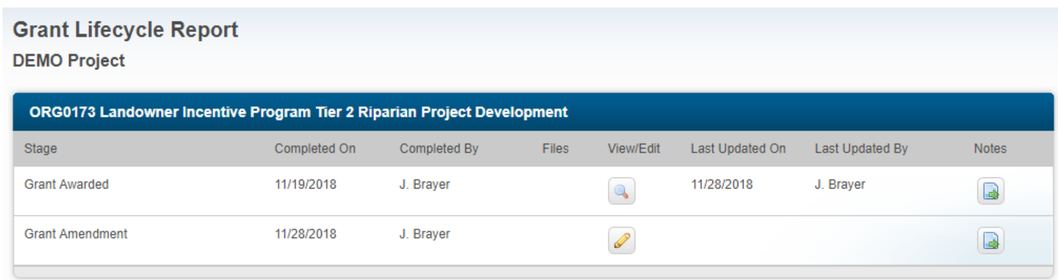
If you are receiving less, simply type in a dash before the Award Adjustment, and it will subtract this amount from the award amount (example: -5,000). The new total award amount will be reflected in the Adjusted Total Award field (in blue font):



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					