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# **Education Grants Management System User Guide for Local Education Agencies**

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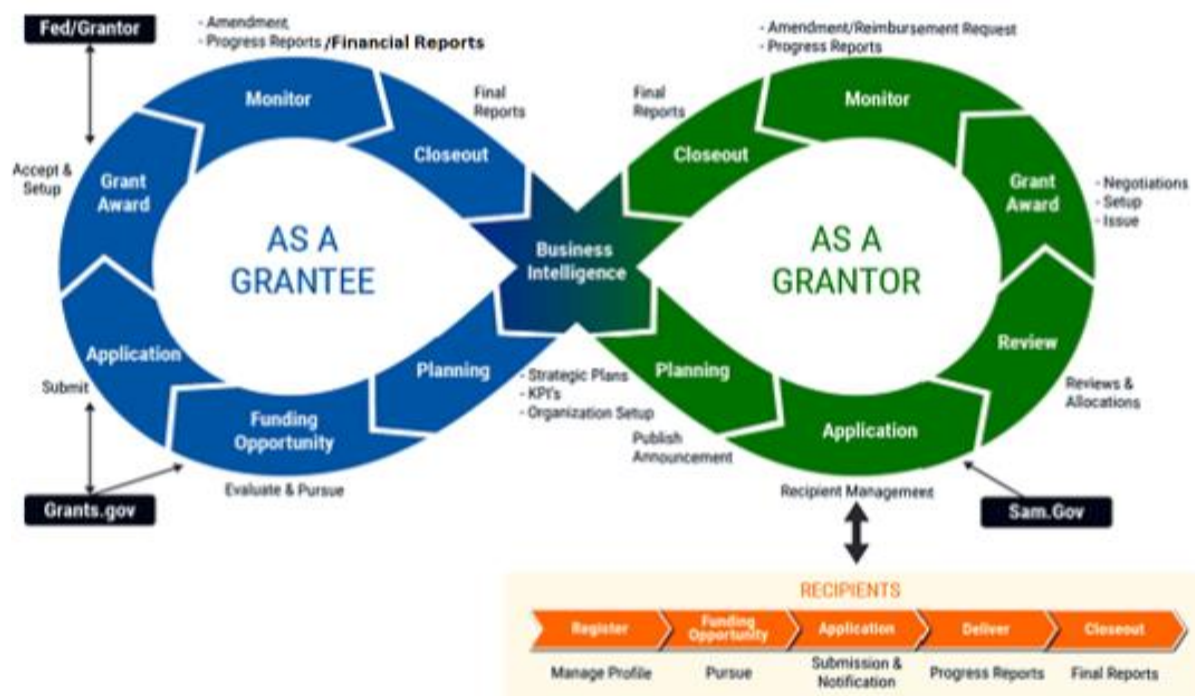
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# 1 SYSTEM OVERVIEW

The Education Grants Management System (EGMS) is an end-to-end grant management application that unifies the Grantee and Grantor grant management processes across agencies. The EGMS user interface is designed to provide users with a quick approach to identify to apply for funding opportunities, manage grants and award grant recipients. The EGMS offers an enterprise solution to identify, track and manage tasks. The EGMS also provides Recipient capabilities for organizations needing tools to administer, track, account for, and report on their grant-related activities. The EGMS is broken down into two separate portals – an internal and an external portal – to support the grants management business processes for the Grantor and Grantee, and an external Grants portal to support Subject Matter Experts and Recipients.



## 1.1 INSTRUCTIONAL NOTATIONS

|  |   |
|--|---|
|  | Important note about functionality or behavior. |
|--|---|



|  |   |
|--|---|
|  | Highlight action discussed in the associated narrative. |
|--|---|

## 2 UNDERSTANDING THE SYSTEM-CONCEPTS

### 2.1 PHASES

The EGMS system uses Phases to organize its features and available actions. These Phases map to the grantmaking lifecycle and are a key navigation feature in EGMS. The Phases are seen as tabs at the top of the user interface (UI). The Phases include Home, Opportunities, Applications, Awards, Monitoring, Closeout, Analytics and Collab.

Each Phase and associated activities are listed in **Error! Reference source not found.**

| Phase                | Associated Activities   |
|----------------------|---|
| <b>Home</b>          | View and manage organization profiles, contacts, and terms and conditions   |
| <b>Opportunities</b> | View opportunities and notices of intent.   |
| <b>Applications</b>  | Allows organizations/individuals to apply for the Funding Opportunity Announcement (FOA). Applications are managed, reviewed, and can be negotiated. Complete and submit Pre-applications and applications. |
| <b>Grants</b>        | View and manage grants and subawards. Organizations receive notice of the grant against Funding Opportunities.  |
| <b>Monitoring</b>    | Complete and submit post-award monitoring activities and collaborate onsite visits and desk reviews.  |
| <b>Closeout</b>      | View and acknowledge closeout requests.   |
| <b>Analytics</b>     | This is a Dashboard page where all the activities of the GovGrants® solution are captured in the form of charts related to all phases. Users can even refine the filters to check specific information.     |
| <b>Collab</b>        | This tab tracks the conversation conducted between the users within the organization.   |

**Table 1: EGMS Phases**

## 2.2 ACRONYMS

Following is a list of common acronyms used in the system and their definitions.

**Table 1: Acronyms**

| Acronym | Definition  |
|---------|---|
| EGMS ID | Education Grants Management System ID                 |
| EIN     | Employer Identification Number                        |
| DUNS    | Dun & Bradstreet Number                               |
| KPIs    | Key Performance Indicators                            |
| NOGA    | Notice of Grant Agreement                             |
| FDM     | Funding Decision Memo                                 |
| SME     | Subject Matter Expert (External or Internal Reviewer) |
| POC     | Point of Contact                                      |

## 2.3 COMMONLY USED ICONS

**Error! Reference source not found.** below describes the most commonly used icons in the EGMS.

**Table 3. Icons**

|  |  |
|--|--|
|  | View detailed information about the associated record  |
|  | Begin the review process   |
|  | Not recommended by the reviewer  |
|  | Recommended by the reviewer  |
|  | Edit associated record   |
|  | Delete associated record   |
|  | Section- or page-specific actions. Left-click to display options. Options may differ depending on the context. |
|  | Home page  |
|  | Available filter options   |

|   |                                    |
|---|------------------------------------|
| ▼ | Un-collapse taskbar section        |
| < | Collapse taskbar                   |
| > | Un-collapse taskbar                |
| ^ | Collapse taskbar section           |
| ▼ | Un-collapse content window section |
| ▲ | Collapse content window section    |
| ▼ | Dropdown menu                      |
|   | Reports                            |
|   | Recently viewed items              |
|   | Activities                         |
|   | Filter options                     |
|   | Begin task                         |
|   | Search                             |
|   | Initiate negotiations              |
|   | Create Subaward                    |

### 3 COMMON FEATURES

EGMS has many features that are used throughout the system, regardless of record type, phase or workflow. These generic features provide a common interface and behavior.

#### 3.1 LOOKUPS

Lookups are performed at the field level. They allow the user to populate a field by conducting the lookup against the appropriate field. In **Error! Reference source not found.**, selecting the icon, brings up a window that allows the available value to be selected.

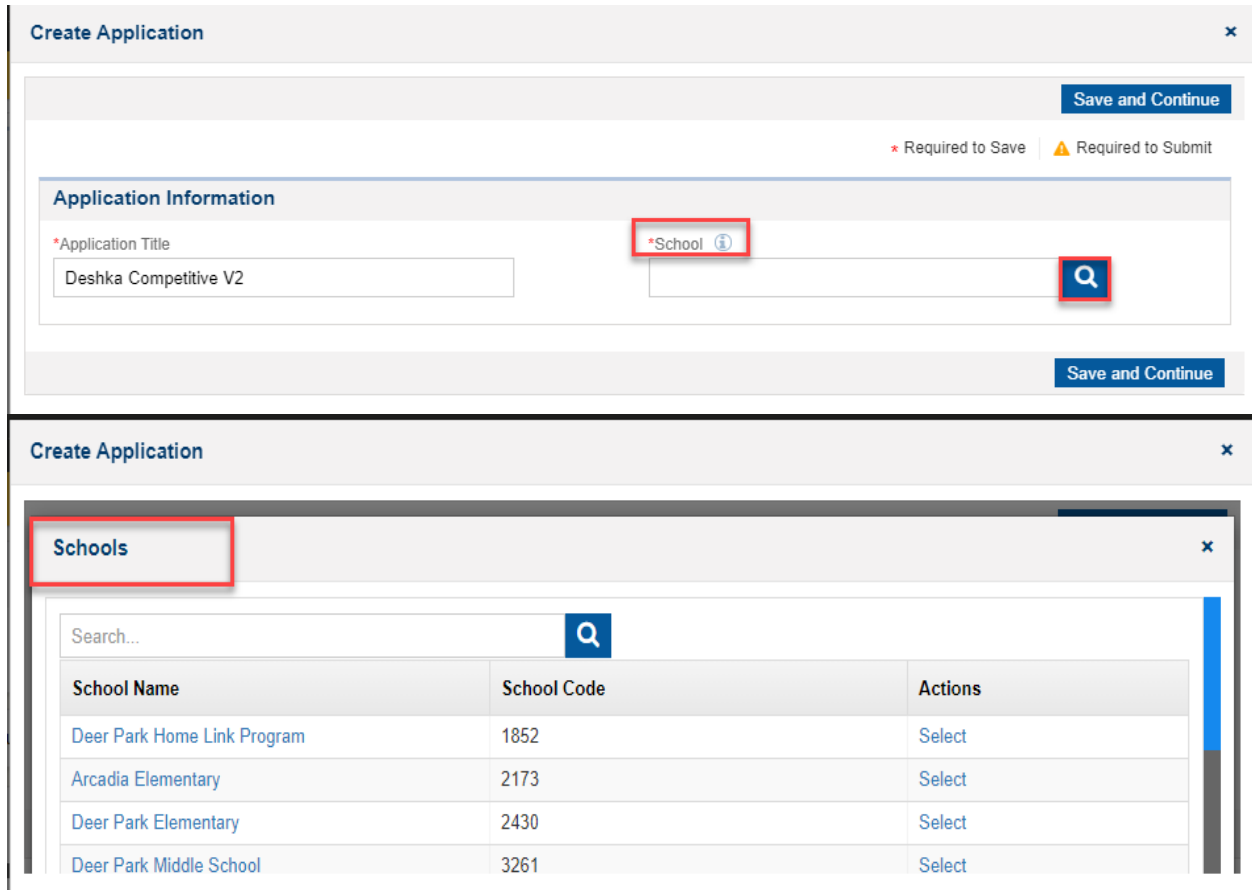


Figure 1: Lookup

### 3.2 LIST FILTERS

Lists within EGMS provide both a quick and advanced search capability.

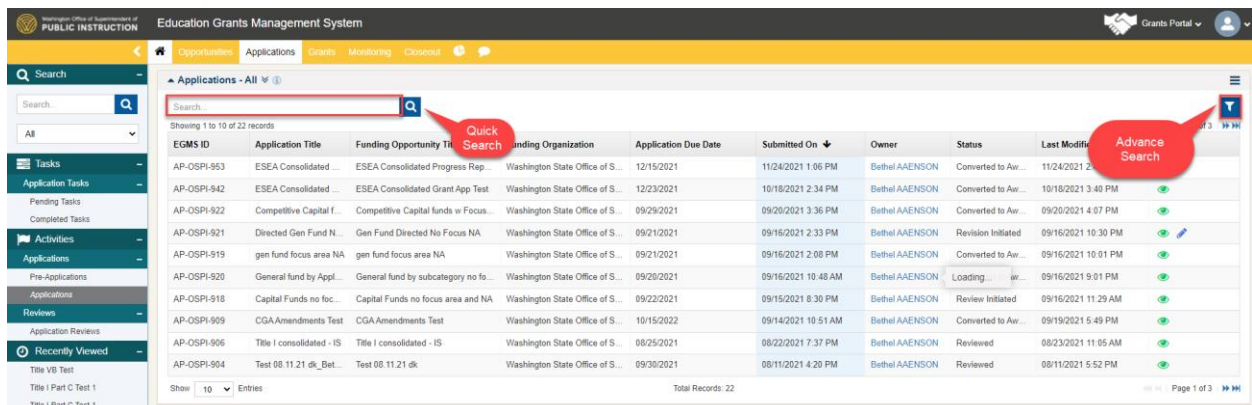


Figure 2: List Filters

A quick search can be added by simply typing in a full or partial string. Only records with matching data will then appear.

Advanced search allows a more complex set of search criteria. This feature supports all available fields and allows multiple criteria to be entered.

To begin an advanced search, click on the  **Filter** icon at the top right of the screen.

The screenshot shows the 'Education Grants Management System' interface. At the top, there are navigation tabs: Opportunities, Applications, Grants, Monitoring, and Closeout. A search bar is located at the top left. Below the search bar, there is a table with columns: EGMS ID, Application Title, Funding Opportunity Title, Funding Organization, Application Due Date, Submitted On, Owner, Status, Last Modified Date, and Actions. The table contains 10 rows of application data. At the bottom right of the table, there is a 'Filter' icon (a blue funnel) and a 'Page 1 of 3' indicator.

| EGMS ID     | Application Title         | Funding Opportunity Title            | Funding Organization            | Application Due Date | Submitted On        | Owner          | Status             | Last Modified Date  | Actions |
|-------------|---------------------------|--------------------------------------|---------------------------------|----------------------|---------------------|----------------|--------------------|---------------------|---------|
| AP-OSPI-953 | ESEA Consolidated ...     | ESEA Consolidated Progress Rep...    | Washington State Office of S... | 12/15/2021           | 11/24/2021 1:06 PM  | Bethel AAENSON | Converted to Aw... | 11/24/2021 2:45 PM  |         |
| AP-OSPI-942 | ESEA Consolidated ...     | ESEA Consolidated Grant App Test     | Washington State Office of S... | 12/23/2021           | 10/18/2021 2:34 PM  | Bethel AAENSON | Converted to Aw... | 10/18/2021 3:40 PM  |         |
| AP-OSPI-922 | Competitive Capital f...  | Competitive Capital funds w Focus... | Washington State Office of S... | 09/29/2021           | 09/20/2021 3:36 PM  | Bethel AAENSON | Converted to Aw... | 09/20/2021 4:07 PM  |         |
| AP-OSPI-921 | Directed Gen Fund N...    | Gen Fund Directed No Focus NA        | Washington State Office of S... | 09/21/2021           | 09/16/2021 2:33 PM  | Bethel AAENSON | Revision Initiated | 09/16/2021 10:30 PM |         |
| AP-OSPI-919 | gen fund focus area NA    | gen fund focus area NA               | Washington State Office of S... | 09/21/2021           | 09/16/2021 2:00 PM  | Bethel AAENSON | Converted to Aw... | 09/16/2021 10:01 PM |         |
| AP-OSPI-920 | General fund by Appl...   | General fund by subcategory no fo... | Washington State Office of S... | 09/20/2021           | 09/16/2021 10:48 AM | Bethel AAENSON | Converted to Aw... | 09/16/2021 9:01 PM  |         |
| AP-OSPI-918 | Capital Funds no foc...   | Capital Funds no focus area and NA   | Washington State Office of S... | 09/22/2021           | 09/15/2021 8:30 PM  | Bethel AAENSON | Review Initiated   | 09/16/2021 11:29 AM |         |
| AP-OSPI-909 | CGA Amendments Test       | CGA Amendments Test                  | Washington State Office of S... | 10/15/2022           | 09/14/2021 10:51 AM | Bethel AAENSON | Converted to Aw... | 09/19/2021 5:49 PM  |         |
| AP-OSPI-906 | Title I consolidated - IS | Title I consolidated - IS            | Washington State Office of S... | 08/25/2021           | 08/22/2021 7:37 PM  | Bethel AAENSON | Reviewed           | 08/23/2021 11:05 AM |         |
| AP-OSPI-904 | Test 08.11.21 dk_Bet...   | Test 08.11.21 dk                     | Washington State Office of S... | 09/30/2021           | 08/11/2021 4:20 PM  | Bethel AAENSON | Reviewed           | 08/11/2021 5:52 PM  |         |

**Figure 3: Advanced Search Button**

This will open an enhanced filter section where you can enter additional filter criteria. There are three values you can populate here to narrow your results list:

1. **Column Name-** The values here will populate based upon the table that you are viewing. Each of the columns in the table that are available for filtering will be listed.
2. **Operator-** The options available here will differ based upon data type for the column you have selected. Text fields will show operators such as Contains, Starts with, and Ends with. Numeric fields will show Equals to, Greater than, Less than, Greater than or equal to, and Less than or equal to. Other options may also be available depending upon the data type of the selected field.
3. **Value-** This is where you enter the value that you would like to use for filtering the selected column.

| Column Name | Operator | Value | Action |
|-------------|----------|-------|--------|
| EGMS ID     | Contains |       | +      |

| EGMS ID     | Application Title         | Funding Opportunity Title            | Funding Organization            | Application Due Date | Submitted On        | Owner          | Status             | Last Modified Date  | Actions |
|-------------|---------------------------|--------------------------------------|---------------------------------|----------------------|---------------------|----------------|--------------------|---------------------|---------|
| AP-OSPI-953 | ESEA Consolidated ...     | ESEA Consolidated Progress Rep...    | Washington State Office of S... | 12/15/2021           | 11/24/2021 1:06 PM  | Bethel AAENSON | Converted to Aw... | 11/24/2021 2:45 PM  | 👁️      |
| AP-OSPI-942 | ESEA Consolidated ...     | ESEA Consolidated Grant App Test     | Washington State Office of S... | 12/23/2021           | 10/18/2021 2:34 PM  | Bethel AAENSON | Loading...         | 10/18/2021 3:40 PM  | 👁️      |
| AP-OSPI-922 | Competitive Capital f...  | Competitive Capital funds w Focus... | Washington State Office of S... | 09/29/2021           | 09/20/2021 3:36 PM  | Bethel AAENSON | Converted to Aw... | 09/20/2021 4:07 PM  | 👁️      |
| AP-OSPI-921 | Directed Gen Fund N...    | Gen Fund Directed No Focus NA        | Washington State Office of S... | 09/21/2021           | 09/16/2021 2:33 PM  | Bethel AAENSON | Revision Initiated | 09/16/2021 10:30 PM | 👁️      |
| AP-OSPI-919 | gen fund focus area NA    | gen fund focus area NA               | Washington State Office of S... | 09/21/2021           | 09/16/2021 2:08 PM  | Bethel AAENSON | Converted to Aw... | 09/16/2021 10:01 PM | 👁️      |
| AP-OSPI-920 | General fund by Appl...   | General fund by subcategory no fo... | Washington State Office of S... | 09/20/2021           | 09/16/2021 10:48 AM | Bethel AAENSON | Converted to Aw... | 09/16/2021 9:01 PM  | 👁️      |
| AP-OSPI-918 | Capital Funds no foc...   | Capital Funds no focus area and NA   | Washington State Office of S... | 09/22/2021           | 09/15/2021 8:30 PM  | Bethel AAENSON | Review Initiated   | 09/16/2021 11:29 AM | 👁️      |
| AP-OSPI-909 | CGA Amendments Test       | CGA Amendments Test                  | Washington State Office of S... | 10/15/2022           | 09/14/2021 10:51 AM | Bethel AAENSON | Converted to Aw... | 09/19/2021 5:49 PM  | 👁️      |
| AP-OSPI-906 | Title I consolidated - IS | Title I consolidated - IS            | Washington State Office of S... | 08/25/2021           | 08/23/2021 7:37 PM  | Bethel AAENSON | Reviewed           | 08/23/2021 11:05 AM | 👁️      |
| AP-OSPI-904 | Test 08.11.21 dk_Bet...   | Test 08.11.21 dk                     | Washington State Office of S... | 09/30/2021           | 08/11/2021 4:20 PM  | Bethel AAENSON | Reviewed           | 08/11/2021 5:52 PM  | 👁️      |

**Figure 4: Advanced Filter Options**

Once you have entered your filter criteria, the + button in the action column will turn green. Click this button to apply your filter. A blue colored icon will show with your filter criteria below the filter bar, and your results will be filtered accordingly.

| Column Name | Operator | Value | Action |
|-------------|----------|-------|--------|
| EGMS ID     | Contains | AP    | +      |

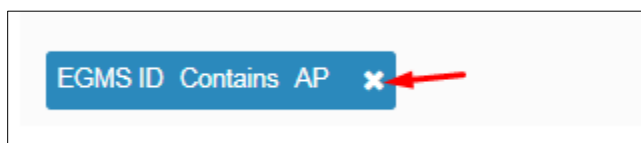
EGMS ID Contains AP

| EGMS ID     | Application Title         | Funding Opportunity Title            | Funding Organization            | Application Due Date | Submitted On        | Owner          | Status             | Last Modified Date  | Actions |
|-------------|---------------------------|--------------------------------------|---------------------------------|----------------------|---------------------|----------------|--------------------|---------------------|---------|
| AP-OSPI-953 | ESEA Consolidated ...     | ESEA Consolidated Progress Rep...    | Washington State Office of S... | 12/15/2021           | 11/24/2021 1:06 PM  | Bethel AAENSON | Converted to Aw... | 11/24/2021 2:45 PM  | 👁️      |
| AP-OSPI-942 | ESEA Consolidated ...     | ESEA Consolidated Grant App Test     | Washington State Office of S... | 12/23/2021           | 10/18/2021 2:34 PM  | Bethel AAENSON | Loading...         | 10/18/2021 3:40 PM  | 👁️      |
| AP-OSPI-922 | Competitive Capital f...  | Competitive Capital funds w Focus... | Washington State Office of S... | 09/29/2021           | 09/20/2021 3:36 PM  | Bethel AAENSON | Converted to Aw... | 09/20/2021 4:07 PM  | 👁️      |
| AP-OSPI-921 | Directed Gen Fund N...    | Gen Fund Directed No Focus NA        | Washington State Office of S... | 09/21/2021           | 09/16/2021 2:33 PM  | Bethel AAENSON | Revision Initiated | 09/16/2021 10:30 PM | 👁️      |
| AP-OSPI-919 | gen fund focus area NA    | gen fund focus area NA               | Washington State Office of S... | 09/21/2021           | 09/16/2021 2:08 PM  | Bethel AAENSON | Converted to Aw... | 09/16/2021 10:01 PM | 👁️      |
| AP-OSPI-920 | General fund by Appl...   | General fund by subcategory no fo... | Washington State Office of S... | 09/20/2021           | 09/16/2021 10:48 AM | Bethel AAENSON | Converted to Aw... | 09/16/2021 9:01 PM  | 👁️      |
| AP-OSPI-918 | Capital Funds no foc...   | Capital Funds no focus area and NA   | Washington State Office of S... | 09/22/2021           | 09/15/2021 8:30 PM  | Bethel AAENSON | Review Initiated   | 09/16/2021 11:29 AM | 👁️      |
| AP-OSPI-909 | CGA Amendments Test       | CGA Amendments Test                  | Washington State Office of S... | 10/15/2022           | 09/14/2021 10:51 AM | Bethel AAENSON | Converted to Aw... | 09/19/2021 5:49 PM  | 👁️      |
| AP-OSPI-906 | Title I consolidated - IS | Title I consolidated - IS            | Washington State Office of S... | 08/25/2021           | 08/23/2021 7:37 PM  | Bethel AAENSON | Reviewed           | 08/23/2021 11:05 AM | 👁️      |
| AP-OSPI-904 | Test 08.11.21 dk_Bet...   | Test 08.11.21 dk                     | Washington State Office of S... | 09/30/2021           | 08/11/2021 4:20 PM  | Bethel AAENSON | Reviewed           | 08/11/2021 5:52 PM  | 👁️      |

**Figure 5: Advanced Filter: Applying Filter Criteria**

- Highlights were added above for demonstration purposes to show the terms that the filter matched for the results list. Highlights will not show in the EGMS. In the above example, we filtered to show only the grants that contained "AP" in the grant ID field.

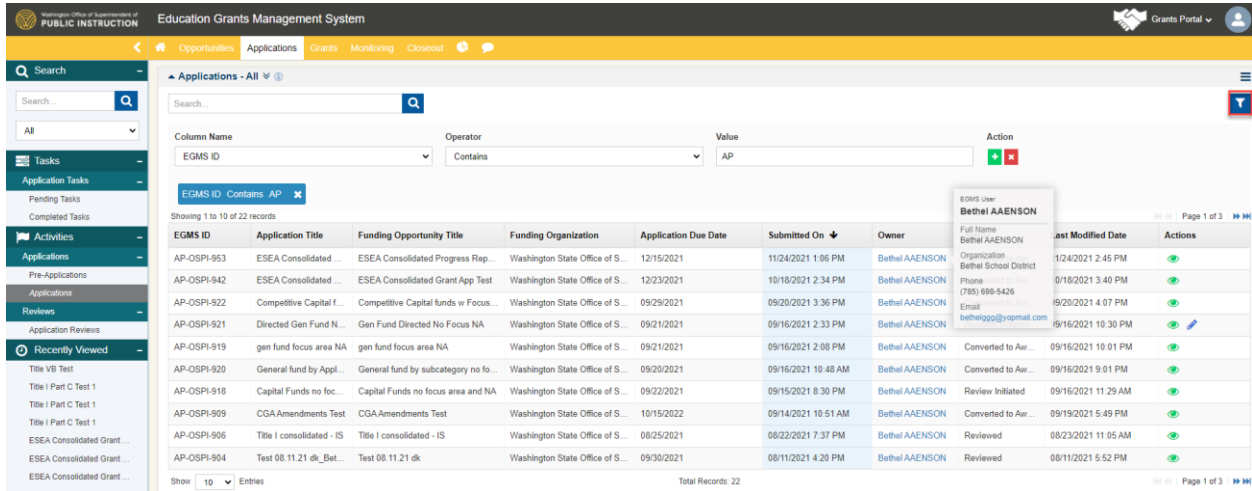
To remove your custom filter, click the X on the blue icon for the filter you created.



**Figure 6: Removing an Advanced Filter**

- To add additional filter criteria, click the green + icon in the Action column.

Click the filter icon again to hide the advanced filter section.



**Figure 7: Hide Advanced Filter**

### 3.3 FILES (ATTACHMENTS)

Attachments are files associated with a record. Many different types of records can include attachments. Regardless of the type of record, all attachments work in the same manner:

- First, attachments may be required or optional. This will depend on the type of activity. Validations can be added to ensure users add attachments by requiring that a file be uploaded with a specific *Classification type* selected.
- Second, attachments can be loaded from your local computer or any file from your workspace.
- Third, all attachments must include a classification. Classifications will vary according to record type.
- Fourth, you must specify sharing options for your uploaded files. You have two options:
  - Visible to anyone with record access – this selection will allow viewing of attachments by anyone who has access to the record. All internal users within OSPI have view access to all records. External users can only view records to which they are associated.
  - Visible to Internal Users with Record Access – This selection will limit viewing of attachments to all internal users. External (District, LEAs, etc.) will not be able to view these attachments.
- Fifth, all attachments must include a brief narrative describing the attachment.

**Add File**
✕

Upload File from Computer

Upload File from Library

Classification

Form Package Instructions

Upload File

Choose a File OR Drag it here

Form Package Instructions.docx

Upload single file up to 2 GB

Sharing Options

Visible to Anyone With Record Access

Visible to Anyone With Record Access  
Select sharing options  
Visible to Anyone With Record Access  
 Visible to Internal Users With Record Access  
 Private On Records

Description

Form Package Instruction

Upload

Cancel

**Figure 8: Uploading a File from Computer**

When uploading files, you can also select to *Upload File from Library*. Selecting to upload from the library will display up to 1000 files of your most recent uploads.

**Add File**
✕

Upload File from Computer

Upload File from Library

Search...

Q

Displays up to 1000 most recent files. Use the Search option to find files if they are not in this recent list. Maximum of 5 files can be selected.

Records Per Page  

5

| <input type="checkbox"/>            | File Name                           | Classification            | Description | Modified Date      |
|-------------------------------------|-------------------------------------|---------------------------|-------------|--------------------|
| <input checked="" type="checkbox"/> | Test Attachment File.txt            | Form Package Instructions |             | 1/5/2021, 09:51 AM |
| <input type="checkbox"/>            | OSPI - All Activity and Object C... | Program Artifacts         |             | 1/6/2021, 05:06 AM |
| <input type="checkbox"/>            | OSPI - All Activity and Object C... | Form Package Instructions |             | 1/6/2021, 07:52 AM |
| <input type="checkbox"/>            | OSPI - All Activity and Object C... | Form Package Instructions |             | 1/6/2021, 07:53 AM |
| <input type="checkbox"/>            | Budget Mockup v4 (1).xlsx           | Form Package Instructions |             | 1/7/2021, 07:14 AM |

Pages 1

Showing 1 to 5 of 183 records

<< < > >>

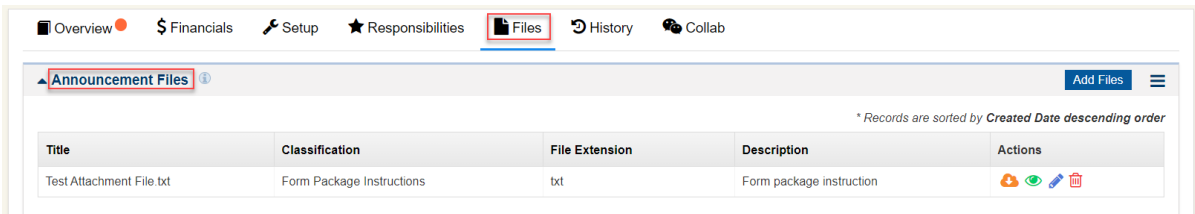
Attach

Cancel

**Figure 9: Uploading a File from Library**



The screenshot below shows an uploaded file attachment.

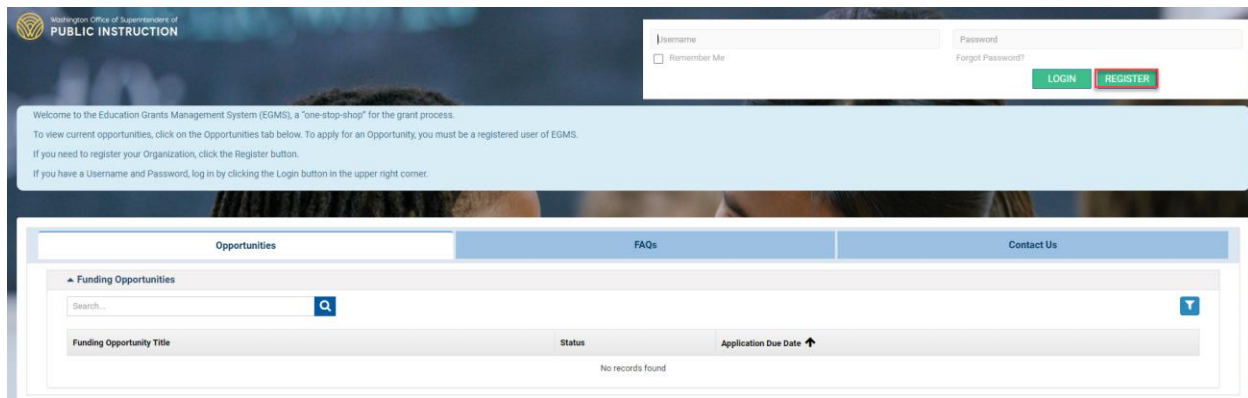


**Figure 20: Uploaded Files**

## 4 REGISTRATION PROCESS

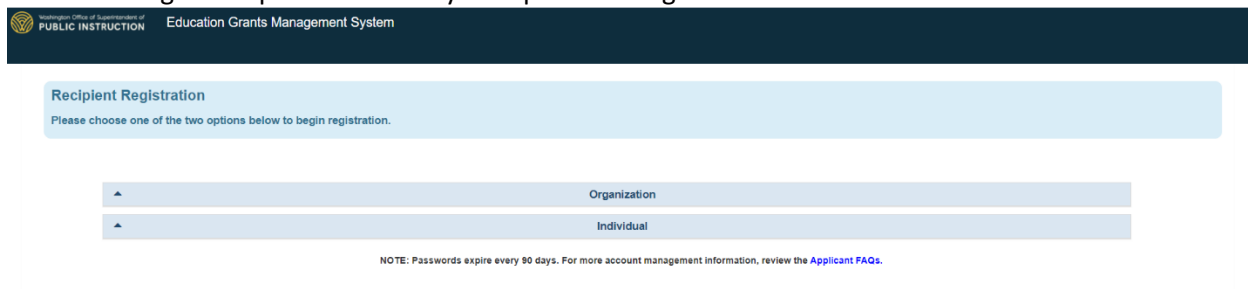
### 4.1 REGISTERING AS AN ORGANIZATION

To register as a Recipient within the EGMS, click on the **Register** button.



**Figure 31: Registering as a Recipient**

OSPI EGMS allows you to register either as an organization or as an individual. An organization is an entity that submits grant applications. These include school districts, Local Educational Associations (LEAs), nonprofit organizations, and others. You should only register as an individual if the opportunity stipulates that individual recipients are eligible to receive an award. Detailed instructions on what is needed to register is provided when you expand the organization or individual sections.



To register as an organization, on the Recipient Registration page, in the **Organization** section, click on **Begin Registration** button to start organization registration.

**Organization**

An organization is an entity that submits grant applications. These include school districts, Local Educational Associations (LEAs), nonprofit organizations, and others.

All organizations must have an Employer Identification Number (EIN) in order to submit a registration. A Unique Entity Identifier (UEI) number is optional to submit a registration. Organizations must provide a UEI if selected for a federal award and before the federal award can be issued. Also, all organizations are required to be registered with SAM.gov if selected for a federal award. A State Vendor ID is optional.

**Please note that it can take as long as 5 weeks to get an EIN number, UEI number, and register with SAM.gov.**

Please find the necessary links below to complete these important steps.

1. Register for your Employer Identification Number (EIN):
  - a. <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
2. Register for your Data Universal Number System (UEI) number:
  - a. <https://update.dnb.com/Update/View/UpdateHome.htm>
3. Register with SAM.gov:
  - a. <https://www.sam.gov/SAM/>
4. Obtain a State Vendor ID:
  - a. <https://dm.va.gov/it-systems/accounting-systems/statewide-vendorpayee-services>
5. Register with EGMS:
 

The Education Grants Management System (EGMS) will validate your EIN and UEI number (if provided) during the registration process. Once all required organization information is complete, the organization's Signing Authority can submit the registration for an EGMS account.
6. Additional Information
  - a. Parents/Child Relationships
    1. Organizations can identify affiliations that describe a hierarchical or parent-child relationship between two organizations.
    2. The child organization can optionally attach any legal documentation used to establish the relationship.
  - b. First Organizational Registration
    1. The first registration for any organization is known as a Signing Authority.
    2. The Signing Authority is an authorized representative of the registered organization and is typically the Administrator.
    3. Additional Users for the organization are created by either the Signing Authority, or another user with these delegated permissions.
    4. If you are NOT the Signing Authority for this organization, please stop and identify the proper individual to complete this initial registration, OR, have the signing authority or primary user send you an invitation.
  - c. You must provide the Organization's legal name.
  - d. You must provide the Organization Code issued by OSPI.

**Begin Registration**

**Figure 42: Registering as an organization**

Review the Non-Disclosure Agreement and click the **Agree** button if you agree to the terms and wish to proceed with the registration process.

- If you select the **Disagree** button, the Recipient registration process will end.

Registration  
Legal Disclaimer 1 of 2

**Non Disclosure Agreement**

Description  
To continue further agreement to the following is required:

**NDA Form**  
The following consent form terms apply to your organizations submission of information and documents to GovGrants. By using GovGrants, you understand and consent to the following:

The funding application submitted herein, includes information that shall not be disclosed outside the Government and shall not be duplicated, used or disclosed in whole or in part, for any purpose other than to evaluate this application, retain a record of submission and to receive, store and transfer documents needed to process applications, conduct pre and post-award transactions and to manage grant awards issued to the registrant organization. Organizational information shall be requested only for the purpose established by the GovGrants for creating and maintaining an account and submitting, reviewing and processing applications and grant awards. No personally-identifiable client-level data shall be required by organization for submission via GovGrants at any time.

Any communication or data transiting or stored on this information system may be disclosed or used for any lawful purpose. You have no reasonable expectation of privacy regarding any communications or data transiting or stored on GovGrants. At any time, any for any lawful purpose, the organization may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.

Applications submitted via GovGrants shall remain confidential until the time that grant terms are accepted by the applicant organization and a grant award is issued by organization. At that time, the documents become public information and subject to review, audit and public disclosure. If a grant is awarded as a result of or in connection with the submission, the application and its contents shall be incorporated by reference into the grantees agreement and requirements, including pre-award conditions. The applicant agrees not to disclose any organization notice of intent to fund until organization issues an award or public notification of the award.

Government shall have the right to duplicate, use or disclose the data to the extent provided in the resulting grant. No confidential or proprietary data will be shared without an applicants permission and will be governed by terms negotiated in the final grant award agreement. This restriction does not limit the organization's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets and, mark each sheet of data it wished to restrict with the following legend: "Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this application."

**Agree** **Disagree**

**Figure 13: Registering as an Organization – Non-Disclosure Agreement**

**Education Grants Management System**

Registration  
**Legal Disclaimer 2 of 2**
Agree Disagree

**Conflict of Interest**

Description  
 The government requires that the SME (subject matter expert) reviewers, as agents of EGMS (enterprise grants management system) maintains the highest standards of confidentiality and security of documents and information related to the review of applications submitted to the system in response to the request for application (RFA) referenced herein. This includes the individual reviewers handling, storage and transmission of any and all documents and information pertaining to the review of applications, the identification of the applicant organizations and the results of review (i.e. score, rank and application strengths and deficiencies). Additionally this includes information pertaining to review panelsists names and affiliations, reviewer assignments and technical review comments. Panel discussions are to be held confidential and written technical reviews and scores shall be embargoed until an assigned and authorized chairperson or government liaison directs the sharing, release and submission of the information required for the review. Reviewers are entrusted by EGMS to protect this confidential information from accidental or intentional release of information. Physical and electronic security measures must be in place to guard and prevent access to confidential materials by unauthorized individuals. Pledge of confidentiality: I, the undersigned, accept the confidentiality terms and standards outlined above. I agree not to use, disclose or disseminate grant application review information outside the customary disclosures related to a review panel process. I shall maintain the confidentiality and uphold the security standards of any information regarding the review process. I understand that to intentionally or unintentionally disclose such information or otherwise breach confidentiality will result in action including dismissal from the assignment and rescission of any agreements for payment from EGMS. I also pledge that I do not have no conflicts of interest, per the government guidance, in performing this work.

Agree Disagree

**Figure 15: Registering as an Organization – Conflict of Interest**

Enter your organization's Employer Identification Number (EIN) and Unique Entity Identifier (UEI) Number and Statewide Vendor ID. Once added, click on the **Save and Continue** button to proceed further.

**Education Grants Management System**

Registration  
**Step 1 of 3**
Fields marked \* are required

To start the organization registration and verification process, provide the required information and click on Save and Continue button.

|   |               |
|---|---------------|
| Employer Identification Number (EIN) *  | 625252529     |
| Unique Entity Identifier (UEI) Number * | 123456987112  |
| Statewide Vendor ID *                   | SHV0252500-00 |

Cancel **Save and Continue**

**Figure 15: Registering an Organization – EIN, UEI**

Navigate to **Organization profile** tab. Provide all the required details in Organization Information, Organization Address, Payment Address sections. Once added, click the **Save** button.

**Education Grants Management System**

Registration  
**Step 2 of 3**
Back Cancel Save

\* Required to Save    ⚠ Required to Submit

**Organization Profile**    Files

**Organization Information**

Please fill in the following fields in order to create your organization profile in the system

|  |   |                                     |
|--|---|-------------------------------------|
| Unique Entity Identifier (UEI) #<br>123456987112 | Employer Identification Number (EIN) *<br>989898978 | *Organization Name *<br>District 21 |
| *Organization Type<br>College/University         | *Organization Code *<br>2356                        | *Phone Number<br>(659) 969-8998     |
| Organization DBA *                               | SAM Expiration Date (MMDD/YYYY)                     |                                     |

**Organization Address**

This is the address associated with the above DUNS number as listed in SAM.gov.

|                                     |                |                    |
|-------------------------------------|----------------|--------------------|
| *Address Line 1<br>4450 Blakely Ave | Address Line 2 | County<br>--None-- |
| *City<br>Bainbridge Island          | *State<br>WA   | *Zip Code<br>21702 |

Registration  
Step 2 of 3

Organization Profile | Files

Organization Information

Organization Address

This is the address associated with the above DUNS number as listed in SAM.gov:

\*Address Line 1: 4450 Blakely Ave  
 \*City: Bainbridge Island  
 Address Line 2:   
 \*State: WA  
 County: --None--  
 \*Zip Code: 21702

Payment Address

Please enter the Payment address if different from the Organization address.  
 \*Same as Organization Address?: No  
 \*City: Arlington  
 Address line 1: 12 Rocky Pointe Ave  
 State: VA  
 Address Line 2:   
 Zip Code: 21111

Cancel Save

Figure 16: Registering as an Organization – org information

Navigate to **Files** tab, to add the documents – optional step. Click **Add** button to add the document.

Registration  
Step 2 of 3

Organization Profile | Files

Attachments

Search...

| #                | Name | Type | Description | Date Attached |
|------------------|------|------|-------------|---------------|
| No records found |      |      |             |               |

Cancel Save

Figure 17: Registering as an Organization – Files

Add the information in the **Authorized Representative Information** section and click the **Save** button.

Registration  
Step 3 of 3

Organization Representatives:

To continue this registration, the following user/profile information is required. Upon approval of this request, your account information will be sent through email to the Administrator.

\* Administrator (Required) – This profile/person is the Administrator with signing authority for the organization and will be responsible for creating other users and/or forms in EGMS. In addition, this role will be responsible for submitting documents like applications, amendment requests, etc. and committing the organization to funding opportunities and formal grant agreements.

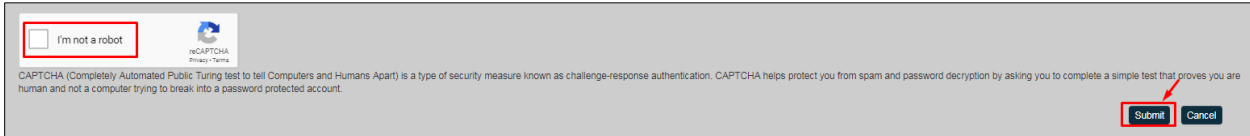
Administrator Information

Prefix: Mr.  
 Title:   
 \*City: Laurel  
 \*Primary Email: peterpan@yopmail.com  
 \*First Name: Tabatha  
 \*Address Line 1: 4450 Blakely Ave  
 State: DC  
 \*Phone Number: (202) 898-8989  
 \*Last Name: Larsen  
 Address Line 2:   
 \*Zip Code: 21111

Back Cancel Save

Figure 18: Registering as an Organization – Authorized Representative Information

Verify the CAPTCHA and then click the **Submit** button. The registration request will be sent to the internal approval queue.



**Figure 19: Registering as an Organization – CAPTCHA**

- **Make a note of the registration number from the 'Confirmation Message' screen.**



**Figure 6: Recipient Registration Confirmation**

**Figure 20: Confirmation Message**

If approved, you will receive an email notification regarding Organization Registration approval.

Contact your System Administrator for registration information.

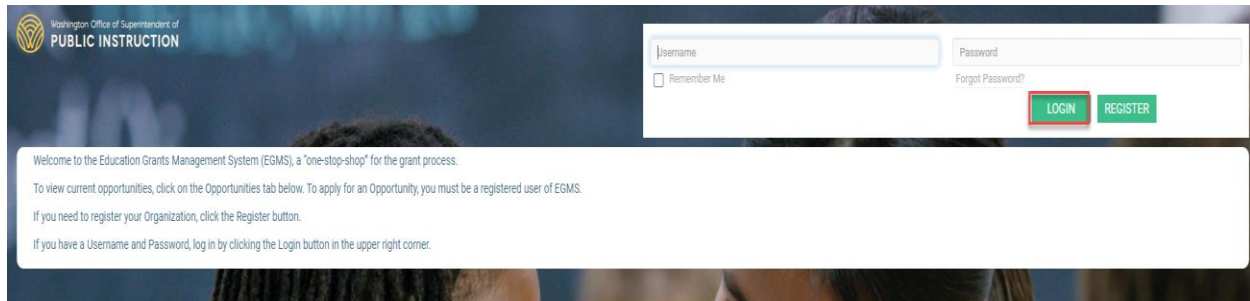
## 5 ACCESSING THE SYSTEM

Logging into the EGMS system requires an internet-connected browser. Current versions of Internet Explorer, Chrome and Firefox are supported.

### 5.1 PREREQUISITE

You will need a username and password to access the system. You can get these credentials through the registration process outlined above in section **Error! Reference source not found.**

## 5.2 LOGGING INTO EGMS



**Figure 21: EGMS Recipient Portal Login Screen**

1. Navigate to <https://ospi-egms.my.salesforce.com/>
2. Enter your Username and Password.
3. Click the Login button.

## 5.3 SECURITY

### 5.3.1 PASSWORD COMPLEXITY

Password complexity is set by EGMS.

- We may change the complexity required for passwords, in the future.

Currently, passwords must contain:

1. At least 8 characters
2. At least 1 letter
3. At least 1 number

### 5.3.2 PASSWORD RESETS

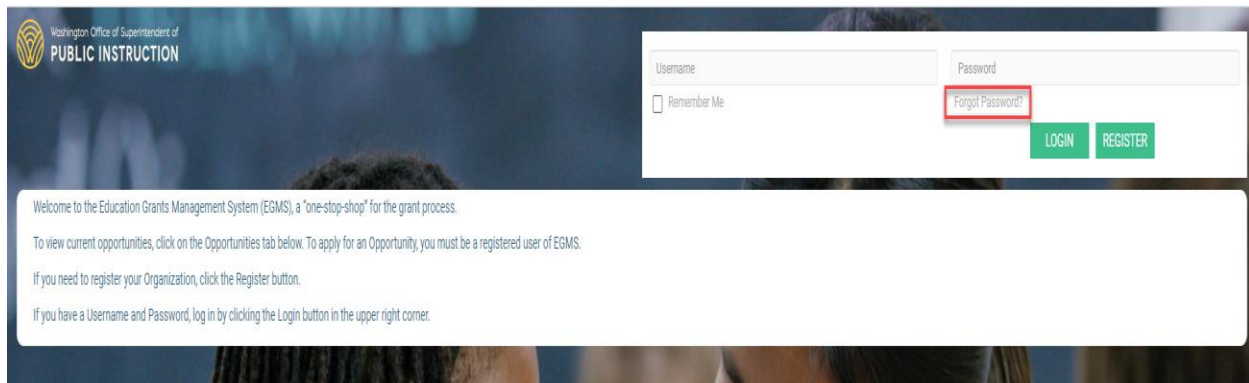
If you have forgotten or need to change your password, this can be done from the login page of the EGMS recipient portal.

To reset your password, follow these steps.

Navigate to the recipient portal address in your browser.

<https://ospi-egms.my.salesforce.com/>

In the Login box click on the Forgot Password? Button.



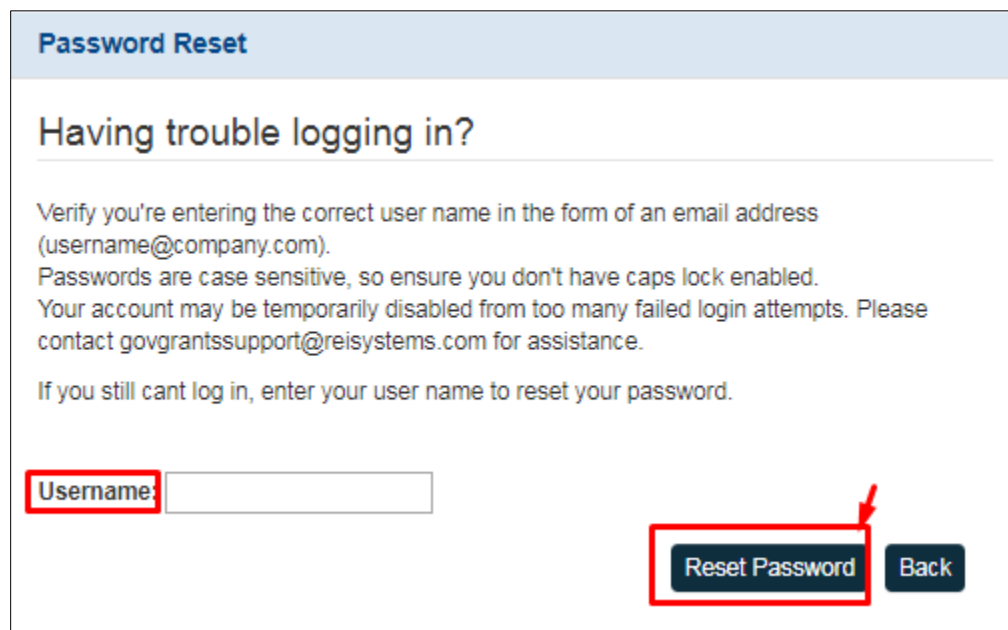
Washington Office of Superintendent of  
**PUBLIC INSTRUCTION**

Username Password  
 Remember Me [Forgot Password?](#)  
**LOGIN REGISTER**

Welcome to the Education Grants Management System (EGMS), a "one-stop-shop" for the grant process.  
To view current opportunities, click on the Opportunities tab below. To apply for an Opportunity, you must be a registered user of EGMS.  
If you need to register your Organization, click the Register button.  
If you have a Username and Password, log in by clicking the Login button in the upper right corner.

**Figure 22: Forgot Password**

In the next screen, enter your username and click the Reset Password button.



**Password Reset**

## Having trouble logging in?

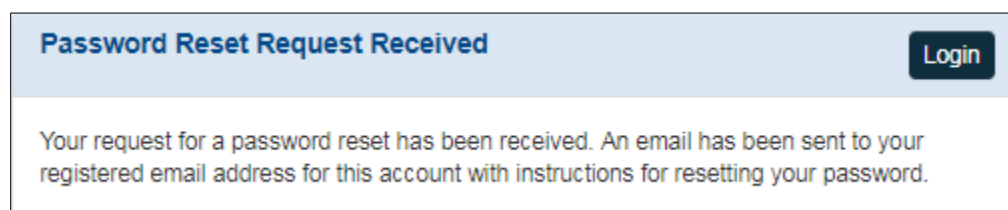
Verify you're entering the correct user name in the form of an email address (username@company.com).  
Passwords are case sensitive, so ensure you don't have caps lock enabled.  
Your account may be temporarily disabled from too many failed login attempts. Please contact govgrantssupport@reisystems.com for assistance.  
If you still cant log in, enter your user name to reset your password.

**Username:**

**Reset Password** **Back**

**Figure 23: Password Reset**

The next page will show a confirmation message, and an email will be sent to the email address associated with your user record.

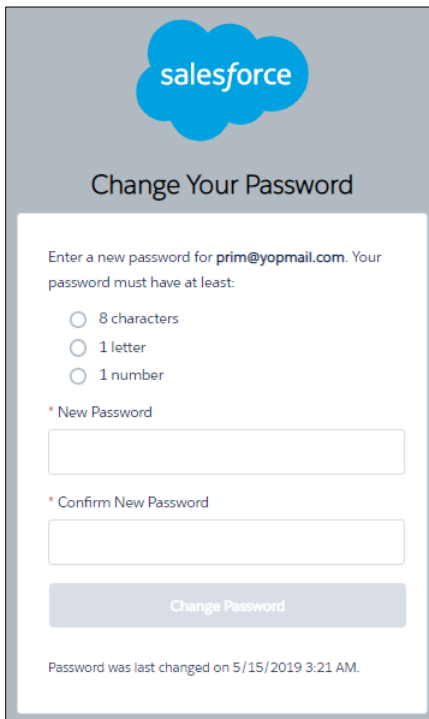


**Password Reset Request Received** **Login**

Your request for a password reset has been received. An email has been sent to your registered email address for this account with instructions for resetting your password.

**Figure 24: Confirmation Message**

The email sent to your email address will contain a link to change your password and allow you to log in to the EGMS recipient portal.



**Figure 25: Entering New Password**

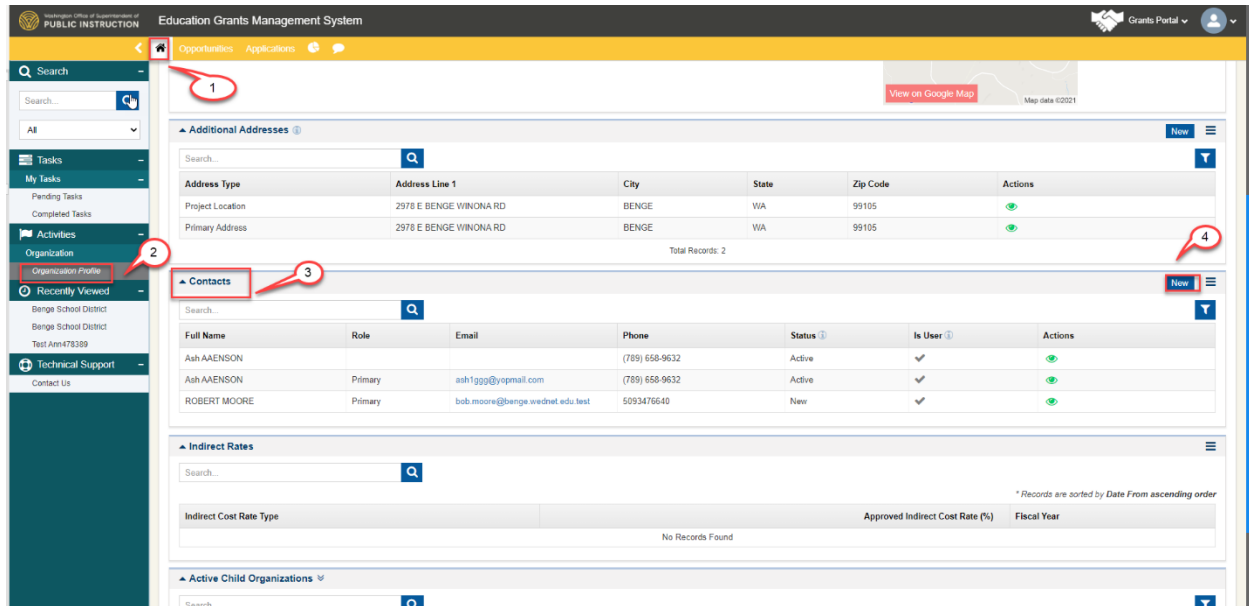
## 6 CREATING USER ACCOUNTS

The EGMS allows you to create accounts for users within your organization.

### 6.1 INVITING USERS TO REGISTER

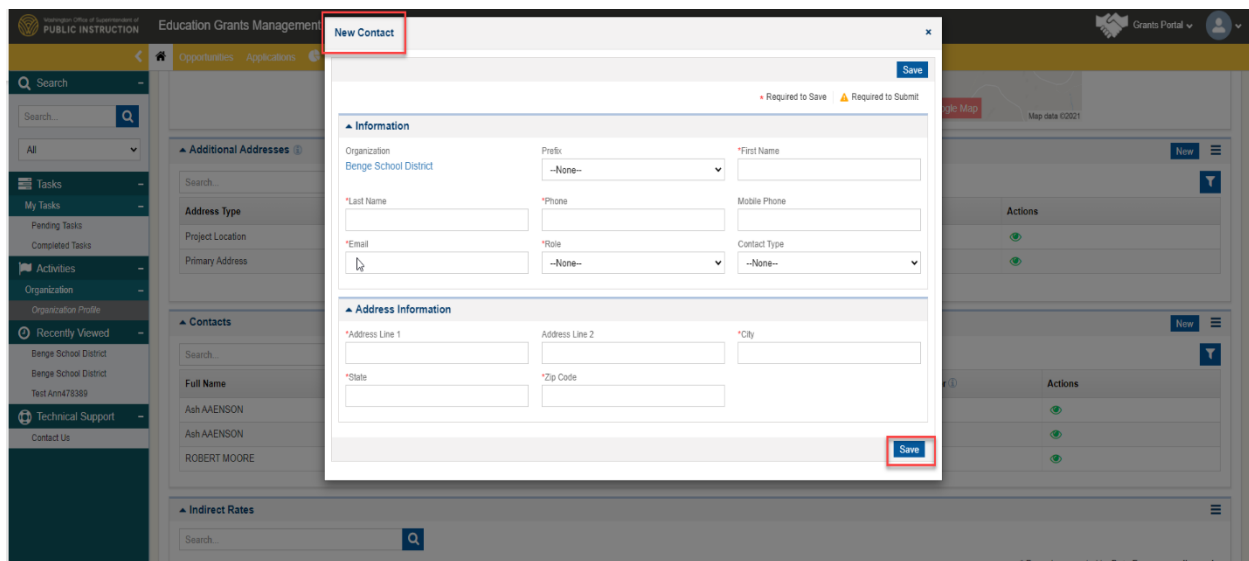
Only District Administrators are able to invite other users to register. From the Home page, click the 'Organization Profile' link under **Organization** in the left-hand navigation menu. On the Recipient Organization page, navigate to the **Contacts** section and click the **New** button.






**Figure 26: Organizational Profile – Contacts Section**

On the Create 'New Contact' modal, enter the required information and any additional information on hand. Once complete, click the **Save** button.



**Figure 27: Creating a New Contact**

The newly created contact will be displayed in the **Contacts** section of the **Organization Profile**. To send the invitation to the contact you created click the Send Invitation  icon under **Actions**.

The screenshot shows the 'Education Grants Management System' interface. On the left is a navigation sidebar with options like 'Search', 'Tasks', 'My Tasks', 'Activities', 'Organization', 'Organization Profile', and 'Recently Viewed'. The main content area displays a table of 'Contacts' with columns for Full Name, Role, Email, Phone, Status, Is User, and Actions. The first row, 'Katrin Ross', is highlighted with a red border. Below the table, there is a 'Send Invitation' modal window.

| Full Name        | Role      | Email                          | Phone          | Status | Is User | Actions |
|------------------|-----------|--------------------------------|----------------|--------|---------|---------|
| Katrin Ross      | Primary   | katrin.ross123456@yopmail.com  | (360) 726-0000 | New    | ✗       |         |
| Adna AAENSON     | Primary   | adnaggg@yopmail.com            | (789) 654-4568 | Active | ✓       |         |
| MOLLY MAJORS     | Secondary | majorsm@adnaschools.org.test   | 3602690186     | New    | ✓       |         |
| Katrin Williams  | Primary   | williamsk@adnaschools.org.test | 3607480362     | New    | ✓       |         |
| JAMES FORREST    | Secondary | forrestj@adnaschools.org.test  | 3602690287     | New    | ✓       |         |
| ELIZABETH DALLAS | Secondary | dallas@adnaschools.org.test    | 360-748-1869   | New    | ✓       |         |
| MARCY SCHEUBER   | Secondary | scheubem@adnaschools.org.test  | 3608808827     | New    | ✓       |         |

**Figure 28: Registration Invitation**

The system will open the Invitation email to send to the user to complete the registration process. Review the template and make revisions, if needed. Once complete, click the **Send** button. The status of the contact will change to **Invitation Sent** and the **Role** field is **read-only**. If a user wants to change the role where the registration process is in progress the Admin must delete the contact and resend the registration request.

The 'Send Invitation' modal window shows an email composition interface. The 'To' field is populated with 'katrin.ross123456@yopmail.com'. The 'Subject' is 'Notification: Invitation to be a User of EGMS'. The email body contains the following text:

*Hello,*

*You are invited to become an Education Grants Management System (EGMS) user.*

*Please [click here](#) to create your login account to register as a User in the EGMS.*

*You will be prompted to agree to a Legal Disclaimer upon registration.*

*Please do not reply to this system-generated email. You may contact the OSPI Support Team at [EGMS.Support@k12.wa.us](mailto:EGMS.Support@k12.wa.us) if you have any questions or need assistance with this task.*

*Thank you,*  
*OSPI EGMS Team*

A blue 'Send' button is located at the bottom left of the modal.

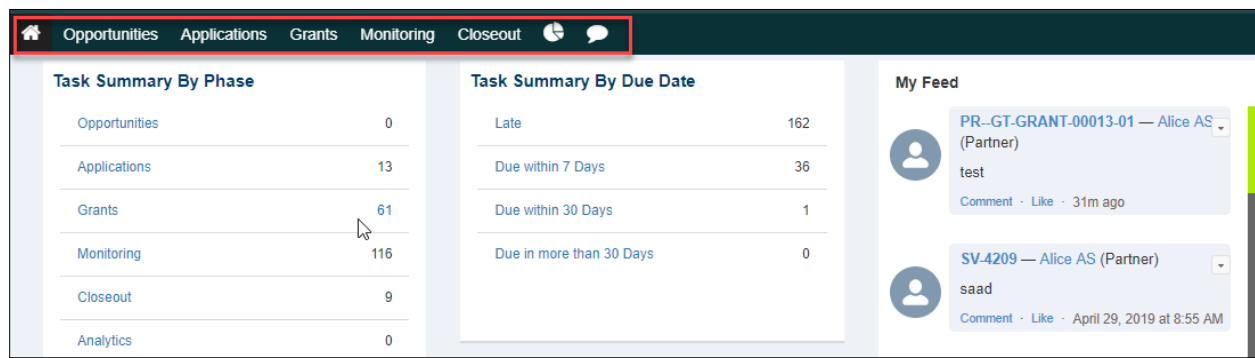
**Figure 29: Send Invitation**

## 7 EGMS SYSTEM LAYOUT

The System is broken down into the following sections:

- Top Navigation Panel
- Left-hand Navigation Menu
- Dashboard Widgets
- My Workspace

### 7.1 TOP NAVIGATION PANEL



**Figure 30: Top Navigation Panel**

The Top Navigation Panel provides users with access to the following modules within the EGMS.

- Home
- Opportunities
- Applications
- Grants
- Monitoring
- Closeout
- Collaboration (Collab)

### 7.2 LEFT-HAND NAVIGATION MENU

The Left-hand navigation menu is present throughout the system; however, the sections and links within the menu are dynamic depending on the system module.

#### 7.2.1 MY TASKS

Tasks are used throughout EGMS to ensure internal users and recipients are aware of required action. Tasks are accompanied by email notification. Clicking the link in the email provides the same action as executing a task.

Once a task is executed, whether by email or by completing a pending task, the task is removed from the pending list and placed in the completed task list.

All tasks that are currently assigned to you and open tasks assigned by you can be viewed.

Regardless of who is receiving the task or what the task is, all tasks can be found in the same place and behave in the same way.

Tasks can be found by clicking on the My Tasks option in the Navigation Bar.

**My Tasks** section is available across all system modules and provides users access to their pending and completed tasks and users can reassign their tasks.

| EGMS ID     | Opportunity Name      | Type        | Pre-Application Required? | Opportunity Release Date | Application Due Date | Status    | Actions |
|-------------|-----------------------|-------------|---------------------------|--------------------------|----------------------|-----------|---------|
| AN-OSPI-598 | Test Ann_08788        | Competitive | Yes                       | 03/31/2021               | 07/22/2026           | Published |         |
| AN-OSPI-459 | Tammy Announcement    | Competitive | Yes                       | 03/13/2021               | 03/15/2024           | Published |         |
| AN-OSPI-688 | Test Ann2873812       | Competitive | Yes                       | 04/05/2021               | 10/22/2021           | Published |         |
| AN-OSPI-338 | Test Announcement1231 | Competitive | Yes                       | 02/26/2021               | 10/21/2021           | Published |         |
| AN-OSPI-577 | Test Ann_04589        | Competitive | Yes                       | 03/25/2021               | 09/23/2021           | Published |         |
| AN-OSPI-701 | TEst Ann8947389       | Competitive | Yes                       | 04/05/2021               | 09/23/2021           | Published |         |
| AN-OSPI-699 | Test Ann83713873      | Competitive | Yes                       | 04/05/2021               | 09/23/2021           | Published |         |
| AN-OSPI-647 | Test Ann7889          | Competitive | Yes                       | 04/02/2021               | 09/23/2021           | Published |         |
| AN-OSPI-277 | Test Announcement 62  | Competitive | Yes                       | 02/22/2021               | 08/26/2021           | Published |         |
| AN-OSPI-695 | Test Ann478389        | Competitive | Yes                       | 04/05/2021               | 08/26/2021           | Published |         |

**Figure 31: My Tasks**

Once selected, your Pending Tasks (Assigned to Me) will appear. Please note the following:

- The EGMS ID identifies the actual record ID in EGMS for which the task is created
- The Type column identifies the type of task
- The Subject column provides additional context for the task
- The Assigned By column identifies the user who assigned the task to you
- The Due Date indicates the timeline for completing the task

Executing a Task is simple. Just select the Green **Play** arrow that appears under the Actions column. Once selected, the action will appear. Typical actions include create, complete and peer reviews.

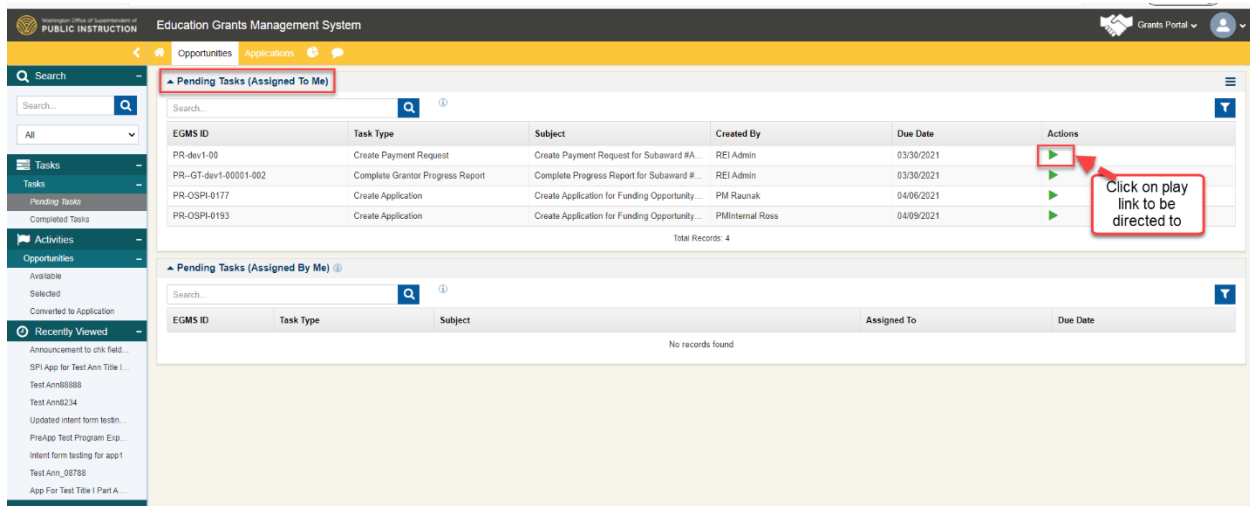


Figure 32: My Pending Tasks

### 7.3 DASHBOARD WIDGETS

The Home dashboard provides users with several widgets that provide information regarding their assigned tasks and funding opportunity information.

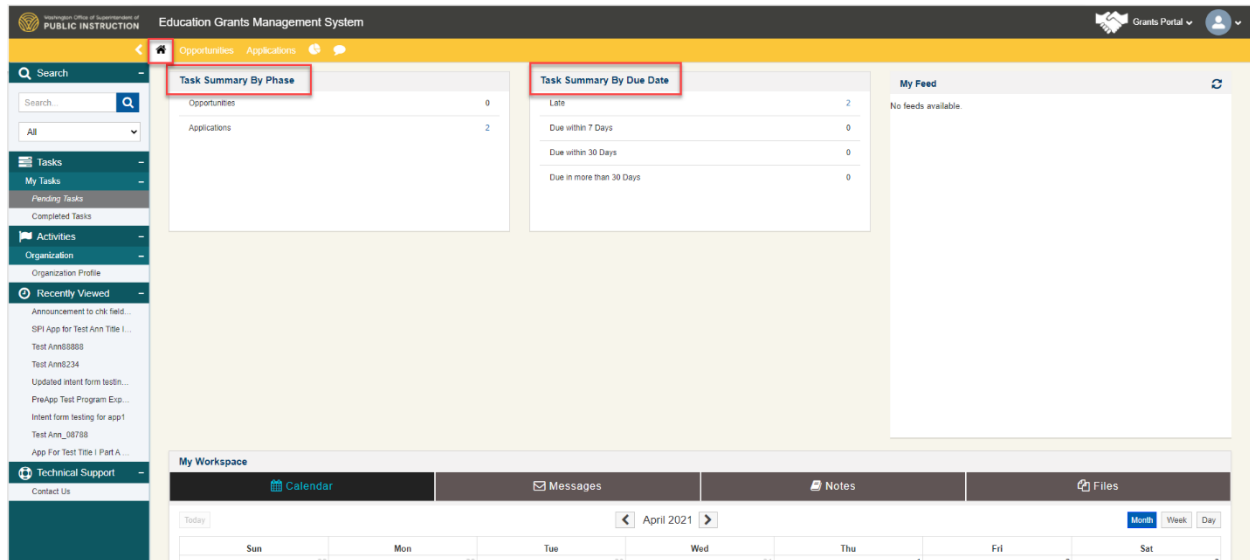


Figure 33: EMGS Dashboard Widgets

#### 7.3.1 TASKS SUMMARY BY PHASE

The **Tasks Summary by Phase** widget provides you with the tasks assigned to them broken down by the system's modules listed in the Top Navigation Panel.

|               |     |
|---------------|-----|
| Opportunities | 0   |
| Applications  | 13  |
| Grants        | 61  |
| Monitoring    | 116 |
| Closeout      | 9   |
| Analytics     | 0   |

**Figure 34: Task Summary by Phase**

### 7.3.2 TASK SUMMARY BY DUE DATE

The **Task Summary by Due Date** widget provides you with your assigned tasks grouped by the due date of the task.

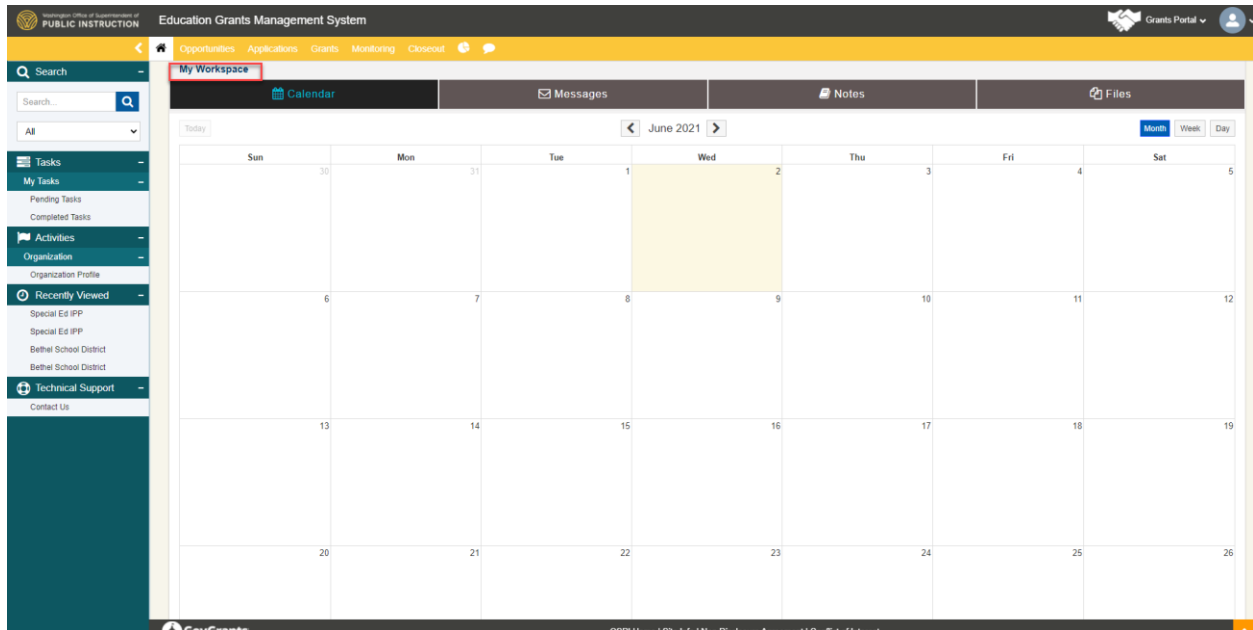
|                          |     |
|--------------------------|-----|
| Late                     | 162 |
| Due within 7 Days        | 36  |
| Due within 30 Days       | 1   |
| Due in more than 30 Days | 0   |

**Figure 35: Task Summary by Due Date**

## 7.4 MY WORKSPACE

**My Workspace** section is broken down into the following sections:

- Calendar
- Messages
- Notes
- Files



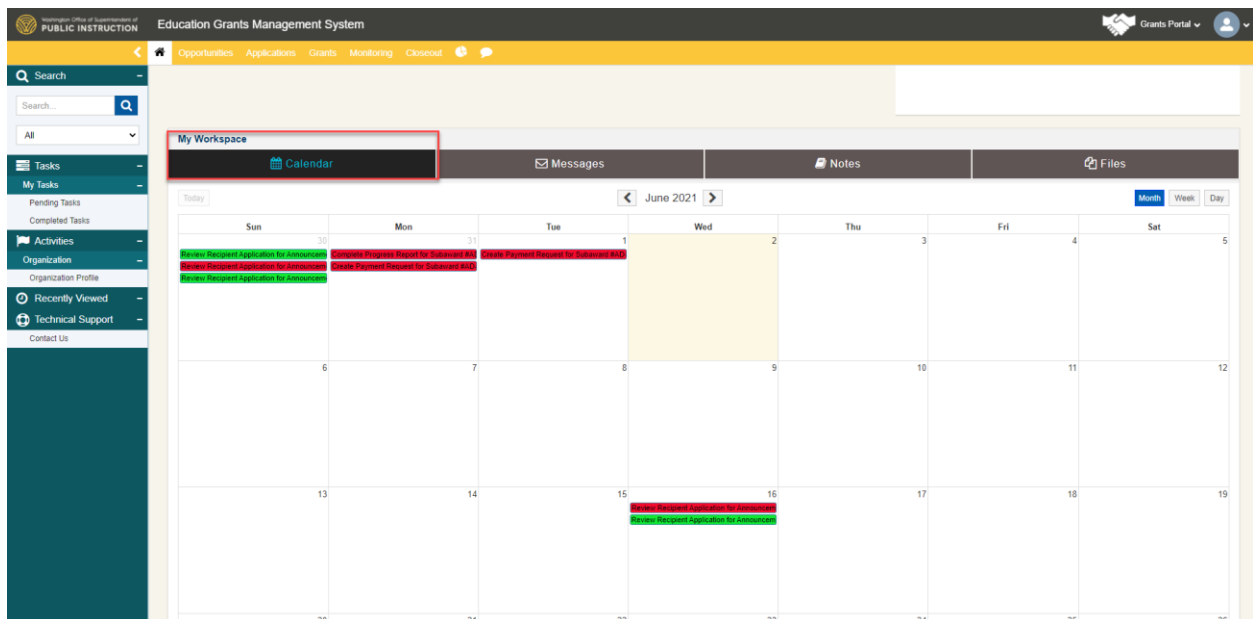
**Figure 36: My Workspace**

### 7.4.1 CALENDAR

Users can view the tasks which are completed, in progress and yet not started working on the calendar. To view the tasks users can have the option to view by month or week or day.

Different color notations are used to categorize the task status as red for not started tasks, yellow for in-progress tasks and green for completed tasks.

To view/perform the task, click on the task in the calendar.



**Figure 37: Calendar**

## 7.4.2 MESSAGES

The portal allows users to send messages/ emails. The users can view the emails they have sent using the system will be displayed in the Messages section. To view and reply back to the message, click on the **View** button in the Action column.

| To Address                 | From Address                   | Email Subject  | Created Date ↓      | Description  | Actions |
|----------------------------|--------------------------------|----------------|---------------------|--|---------|
| mnanda021@gmail.com        | mnyamagouda@reisystems.com     | Re: Hellow     | 11/15/2019 12:05 PM | -----Original Message----- From: mnyamagouda@reisystems.com  |         |
| mnanda021@gmail.com        | mnyamagouda@reisystems.com     | Hellow         | 11/15/2019 12:04 PM | Hellow   |         |
| test@gmail.com             | govgrantsuat@gmail.com         | test           | 11/14/2019 2:22 AM  | test   |         |
| poon@gmail.com             | govgrantsuat@gmail.com         | test           | 11/13/2019 2:37 AM  | test   |         |
| govgrantsuat@gmail.com     | govgrantsuat@gmail.com         | Re: test       | 11/5/2019 8:51 AM   | test -----Original Message----- From: govgrantsuat@gmail.com |         |
| kunal.shah@reisystems.com  | govgrantsuat@gmail.com         |                | 11/5/2019 8:10 AM   |  |         |
| kunal.shah@reisystems.com  | govgrantsuat@gmail.com         | test           | 11/4/2019 12:36 PM  | test   |         |
| sample@gmail.com           | govgrantsuat@gmail.com         | sample subject | 10/22/2019 5:34 AM  | sample body  |         |
| sample@gmail.com           | govgrants.admin@reisystems.com | sample subject | 10/22/2019 5:25 AM  | sample body  |         |
| travis.prim@reisystems.com | govgrantsuat@gmail.com         | Test email     | 10/21/2019 9:29 AM  | Test   |         |

**Figure 38: Messages**

The reply template will auto-populate the receiver's details. On the modal window, to reply to the message, click the **Reply** button.

**View** ✕

**From**  
mnanda021@gmail.com

**To**  
piyusha.malankar@reisystems.in

**Cc**

**Send Copy To Me**

**Subject**  
test

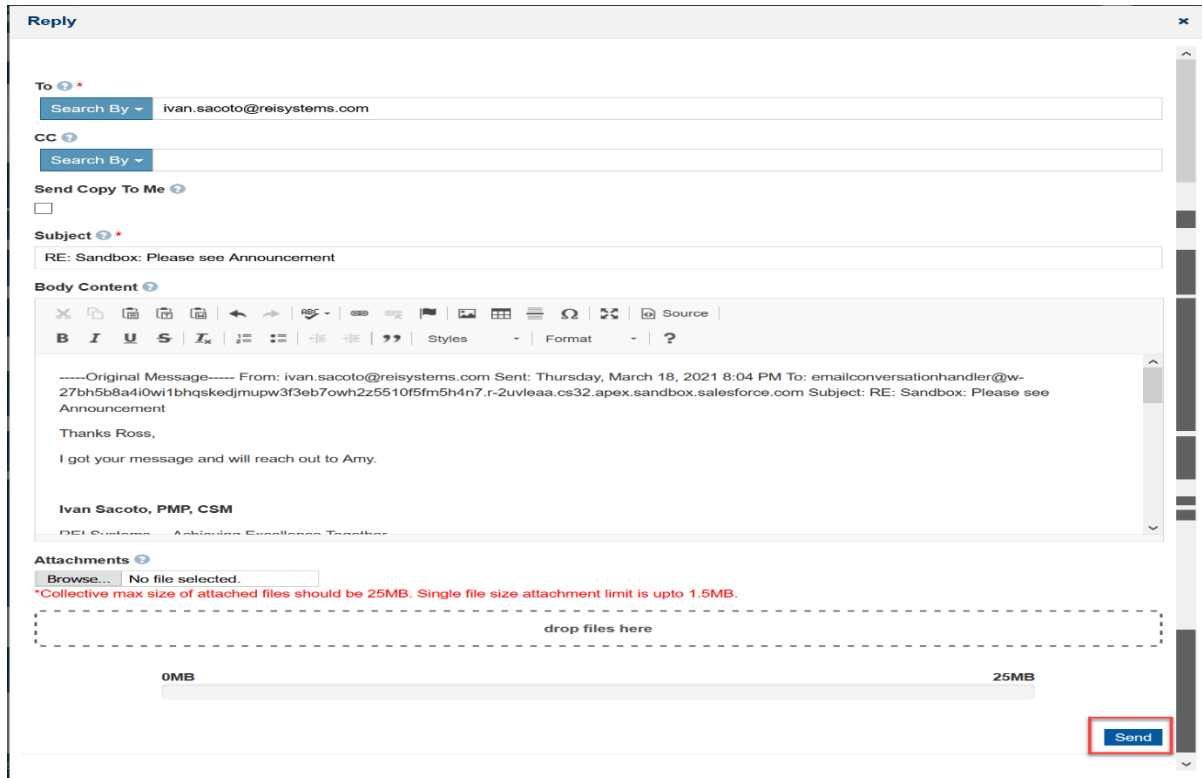
**Body Content**  
GNT:EmailTemplate emailTemplateName="{!emailTemplateName}" emailId="{!emailId}" target="{!targetId}" actionInterface="{!this}" enableAttachment="true" readOnlyTemplate="true" userMode="false" closeOnSuccess="true"

Reply

**Figure 39: View Message Details**

Once completed, click on the **Send** button.

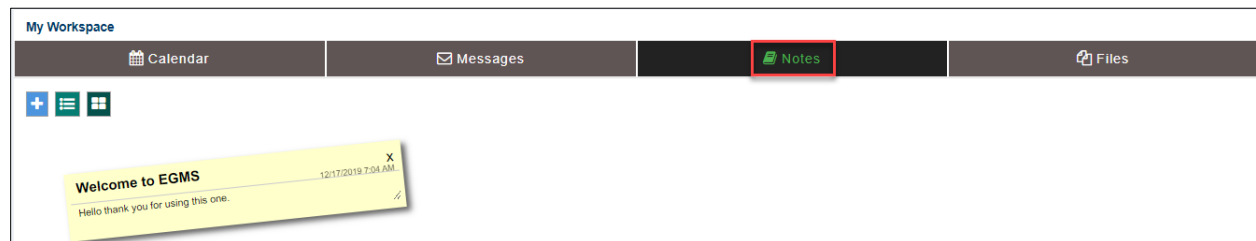




**Figure 40: Send Message**

### 7.4.3 NOTES

**Notes** provide users with the ability to create notes or a to-do list to help users track and manage their day-to-day activities.



**Figure 41: Notes**

### 7.4.4 FILES

**Files** provide users with a centralized location for all the attachments the user has uploaded into different tasks throughout the EGMS system. Files will also house system snapshots taken by the user and a snapshot of review decisions.

- **Snapshot** - In addition to manually taking a snapshot, the system will automatically capture a snapshot of a record once you submit a record for further review. To access a snapshot, you have taken or a snapshot automatically captured by the system, navigate to the *Snapshot History* section within the History tab for a specific record. You can also access a *Snapshot under the Files* section of *My Workspace*.

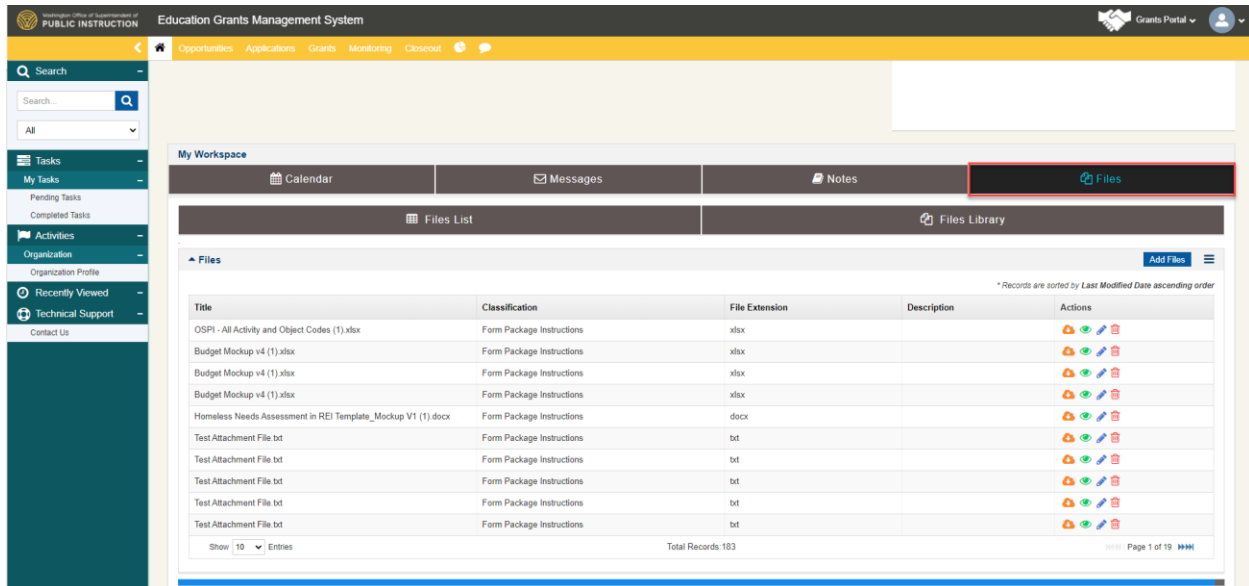



Figure 42: Files

## 8 OPPORTUNITIES

An Opportunity is a publicly available document/information by which an agency makes known its intentions to award grants to support an initiative and progress education efforts throughout the state of Washington.

### 8.1 VIEWING OPPORTUNITIES

Login to the EGMS Grants Portal. Click on the **Opportunities** module and click the **'Available'** Opportunities link under **Opportunities** in the left-hand navigation menu. The content page will list all open and closed published Funding Opportunities. Note that you can filter the list by clicking on the double

arrow filter icon  displayed next to the title of the table.

| EGMS ID     | Opportunity Name      | Type        | Opportunity Release Date | Application Due Date | Status    | Actions |
|-------------|-----------------------|-------------|--------------------------|----------------------|-----------|---------|
| AN-OSPI-598 | Test Ann_08788        | Competitive | 03/31/2021               | 07/22/2026           | Published |         |
| AN-OSPI-459 | Tanmay Announcement   | Competitive | 03/13/2021               | 03/15/2024           | Published |         |
| AN-OSPI-688 | Test Ann2873812       | Competitive | 04/05/2021               | 10/22/2021           | Published |         |
| AN-OSPI-338 | Test Announcement1231 | Competitive | 02/26/2021               | 10/21/2021           | Published |         |
| AN-OSPI-577 | Test Ann_04589        | Competitive | 03/25/2021               | 09/23/2021           | Published |         |
| AN-OSPI-701 | TEst Ann8947389       | Competitive | 04/05/2021               | 09/23/2021           | Published |         |
| AN-OSPI-699 | Test Ann63713873      | Competitive | 04/05/2021               | 09/23/2021           | Published |         |
| AN-OSPI-647 | Test Ann7889          | Competitive | 04/02/2021               | 09/23/2021           | Published |         |
| AN-OSPI-277 | Test Announcement 62  | Competitive | 02/22/2021               | 08/26/2021           | Published |         |
| AN-OSPI-695 | Test Ann478389        | Competitive | 04/05/2021               | 08/26/2021           | Published |         |

**Figure 43: Available Opportunities**

To view additional details for a Funding Opportunity, click the **View** icon under the **Actions** column for the opportunity you want to view.

| EGMS ID     | Opportunity Name      | Type        | Opportunity Release Date | Application Due Date | Status    | Actions |
|-------------|-----------------------|-------------|--------------------------|----------------------|-----------|---------|
| AN-OSPI-598 | Test Ann_08788        | Competitive | 03/31/2021               | 07/22/2026           | Published |         |
| AN-OSPI-459 | Tanmay Announcement   | Competitive | 03/13/2021               | 03/15/2024           | Published |         |
| AN-OSPI-688 | Test Ann2873812       | Competitive | 04/05/2021               | 10/22/2021           | Published |         |
| AN-OSPI-338 | Test Announcement1231 | Competitive | 02/26/2021               | 10/21/2021           | Published |         |
| AN-OSPI-577 | Test Ann_04589        | Competitive | 03/25/2021               | 09/23/2021           | Published |         |
| AN-OSPI-701 | TEst Ann8947389       | Competitive | 04/05/2021               | 09/23/2021           | Published |         |
| AN-OSPI-699 | Test Ann63713873      | Competitive | 04/05/2021               | 09/23/2021           | Published |         |
| AN-OSPI-647 | Test Ann7889          | Competitive | 04/02/2021               | 09/23/2021           | Published |         |
| AN-OSPI-277 | Test Announcement 62  | Competitive | 02/22/2021               | 08/26/2021           | Published |         |
| AN-OSPI-695 | Test Ann478389        | Competitive | 04/05/2021               | 08/26/2021           | Published |         |

**Figure 44: View Additional Details for a Funding Opportunity**

## 8.2 QUALIFIED OPPORTUNITIES

After selecting to view an opportunity, within the Opportunity pages, review the Funding Opportunity details within all tabs to determine if your organization will apply for the grant. If your organization would like to apply for the Funding Opportunity, click the **Qualify** button at the top right of the page. The system will refresh the page and display a **Create pre-application** or **Create application** button on the top right of the page. Note that all qualified opportunities are stored under the 'Selected' link on the left navigation menu. So, if you leave the opportunity after qualifying it you can find your qualified opportunity by navigating to the Opportunities section on the left navigation menu and clicking on the 'Selected' link. You can then open your opportunity by clicking on the view icon under the 'Actions' column next to your opportunity.

Washington Office of Superintendent of PUBLIC INSTRUCTION Education Grants Management System

Opportunities Applications

Selected - All

| EGMS ID     | Opportunity Name            | Type        | Opportunity Release Date | Application Due Date | Status    | Actions |
|-------------|-----------------------------|-------------|--------------------------|----------------------|-----------|---------|
| AN-OSPI-598 | Test Ann_08788              | Competitive | 2021-03-31               | 2026-07-22           | Qualified |         |
| AN-OSPI-459 | Tanmay Announcement         | Competitive | 2021-03-13               | 2024-03-15           | Qualified |         |
| AN-OSPI-688 | Test Ann2873812             | Competitive | 2021-04-05               | 2021-10-22           | Qualified |         |
| AN-OSPI-688 | Test Ann2873812             | Competitive | 2021-04-05               | 2021-10-22           | Qualified |         |
| AN-OSPI-338 | Test Announcement1231       | Competitive | 2021-02-26               | 2021-10-21           | Qualified |         |
| AN-OSPI-624 | Test Ann230                 | Formula     | 2021-04-01               | 2021-07-29           | Qualified |         |
| AN-OSPI-421 | TestAnn555                  | Competitive | 2021-03-11               | 2021-07-21           | Qualified |         |
| AN-OSPI-130 | Intent form testing for app | Formula     | 2021-02-04               | 2021-07-16           | Qualified |         |
| AN-OSPI-322 | Test Announcement Demo4     | Competitive | 2021-02-25               | 2021-06-23           | Qualified |         |
| AN-OSPI-325 | TEst Announcement167        | Competitive | 2021-02-25               | 2021-06-23           | Qualified |         |

Show 10 Entries Total Records: 70 Page 1 of 7

Figure 45: Qualify Funding Opportunity

Washington Office of Superintendent of PUBLIC INSTRUCTION Education Grants Management System

Opportunities Applications

Quality

Opportunity: Deshka Formula Announcement

EGMS ID: AN-OSPI-474 Status: Published Pre-Application (SAS) Due Date: 04/09/2021 Application Due Date

This funding opportunity has not yet been qualified by your organization. If the opportunity is still open, and you want to pursue this... [view more](#)

Click Qualify on the chosen opportunity

Overview Financials Files Collab

Opportunity Information

|  |                              |  |
|--|------------------------------|--|
| Opportunity Name: Deshka Formula Announcement    | Type: Formula                | Program ID: PG-OSPI-0560                               |
| Maximum # Applications Allowed: 1                | Program Type: Formula Grants | Form Package Type: Federal grant                       |
| Authorizing Statute: Link to Authorizing Statute |                              | (SAS) Federal Grant for Research and Development?: Yes |

Opportunity Specific Settings

|  |                                |                                |
|--|--------------------------------|--------------------------------|
| Subrecipient Match Required?: Yes                    | Subrecipient Match (%): 25.00% | Program Income Allowed?: Yes   |
| Pre-Application (SAS) Required?: Yes                 | Focus Area Required?: Yes      | Risk Assessment Required?: Yes |
| Are Expense Details Required on Reimbursements?: Yes | Negotiations Allowed?: Yes     |                                |

Federal/NGO Programs

Figure 46: Qualify Funding Opportunity

The Opportunity is now in a **Qualified** status, and your organization can now proceed with the creation of the Pre-Application.

### 8.3 GENERAL ASSURANCES FORM

Each Fiscal Year a new Assurances form must be submitted. Go to the Organizational Profile and click on the Assurances tab.

Education Grants Management System

Subrecipient Organization: Arlington County

Org Code: 12345 | Status: Active | EIN: 726000789 | UEI: [blank]

Navigation: Overview | Collab | Related Log | **Assurances** | Files

Section: General Assurances

Showing 1 to 10 of 19 records

| Fiscal Year | Created By | Created On          | Last Modified By | Last Modified On   | Last Submitted On   | Status      | Actions |
|-------------|------------|---------------------|------------------|--------------------|---------------------|-------------|---------|
| 2030        | Roger F    | 04/22/2021 8:05 AM  | Roger F          | 06/02/2021 2:40 PM |                     | In Progress | [Edit]  |
| 2023        | Roger F    | 04/02/2021 7:01 AM  | Roger F          | 06/02/2021 2:40 PM | 04/02/2021 7:03 AM  | Submitted   | [Eye]   |
| 2022        | Roger F    | 03/03/2021 5:20 AM  | Roger F          | 06/02/2021 2:40 PM | 03/03/2021 6:14 AM  | Submitted   | [Eye]   |
| 2021        | Roger F    | 01/22/2021 12:18 AM | Roger F          | 06/02/2021 2:40 PM | 01/22/2021 3:28 AM  | Submitted   | [Eye]   |
| 2020        | Roger F    | 04/14/2021 4:12 PM  | Roger F          | 06/02/2021 2:40 PM | 04/14/2021 4:13 PM  | Submitted   | [Eye]   |
| 2019        | Roger F    | 01/21/2021 11:02 PM | Roger F          | 06/02/2021 2:40 PM | 01/21/2021 11:02 PM | Submitted   | [Eye]   |
| 2018        | Roger F    | 01/21/2021 11:00 PM | Roger F          | 06/02/2021 2:40 PM | 01/21/2021 11:01 PM | Submitted   | [Eye]   |
| 2017        | Roger F    | 01/26/2021 12:19 AM | Roger F          | 06/02/2021 2:40 PM | 03/17/2021 4:10 AM  | Submitted   | [Eye]   |
| 2016        | Roger F    | 01/22/2021 6:13 AM  | Roger F          | 06/02/2021 2:40 PM | 03/17/2021 4:07 AM  | Submitted   | [Eye]   |
| 2015        | Roger F    | 05/12/2021 12:16 PM | Roger F          | 06/02/2021 2:40 PM | 05/12/2021 12:17 PM | Submitted   | [Eye]   |

Total Records: 19

Figure 47: Assurances

Click on Submit the General Assurances and click on the Fiscal Year to select the final year of the fiscal year that you want to be represented. For example, select 2021 for the 2020-2021 fiscal year.

Education Grants Management System

General Assurance

Buttons: Cancel | Save

Required to Save | Required to Submit

Section: Fiscal Year

\*Fiscal Year: 2023

Section: General Assurance for all Federal and State Programs (21-22)

Instructions: Completion of this page by the authorized representative indicates an agreement to all applicable assurances listed on this page as well as in all federal and state form packages contained in the EGMS system. Signing below is considered agreement in writing.

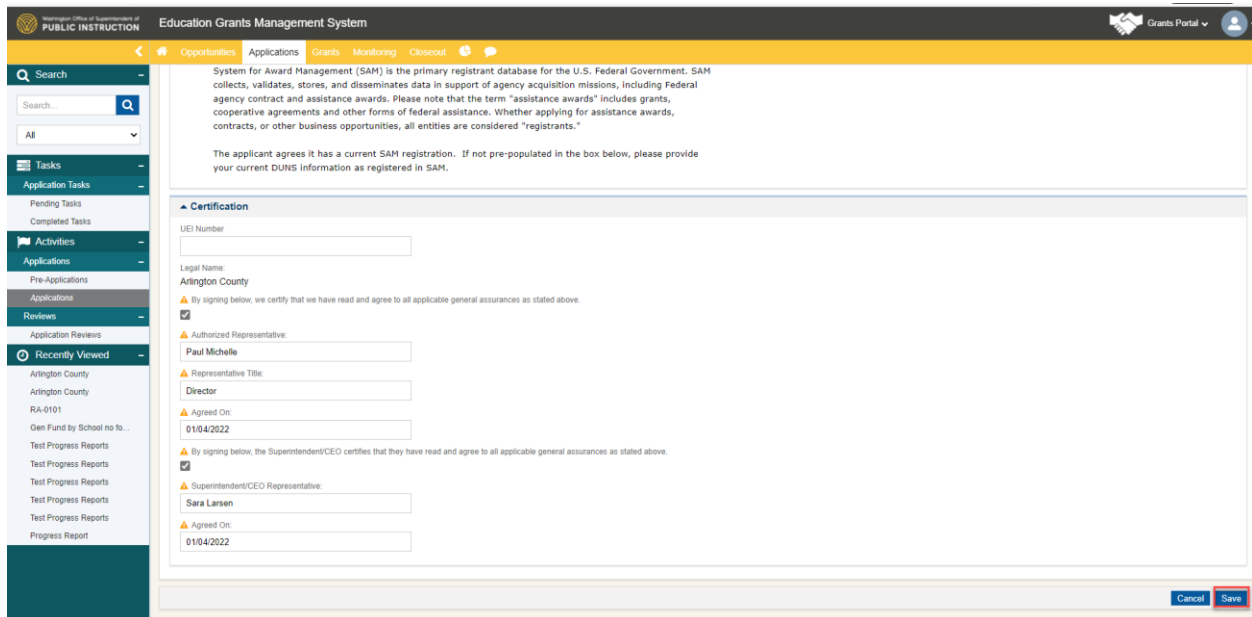
Section: Assurances

- The applicant will comply with all federal and state statutes and administrative regulations and all program plans and applications which are applicable to each program included in this application.
- The applicant will use fiscal control and fund accounting procedures that will ensure proper disbursement of, and accounting for, federal and state funds paid to the applicant under each program in this application and in the event of an audit exception, shall repay federal and state funds upon completion of audit resolution.
- The applicant will control funds provided under each such program and title to property acquired with program funds will be in a public agency or in a nonprofit private agency, institution, organization, or Indian tribe if the law authorizing the program provides for assistance to such entities.
- The applicant agrees to adopt and use proper methods of administering each program in this application, including but not limited to: the enforcement of any obligations imposed by federal and state statutes and administrative rules on the applicant responsible for carrying out each program and correcting any deficiencies in program operations that are identified through audits, monitoring or evaluation.
- The applicant will maintain accurate and timely program plan records which document progress in implementing the plans in this application and will amend any application plan when necessary to reflect significant changes in program scope and/or budget.

Section: Records Retention and Access

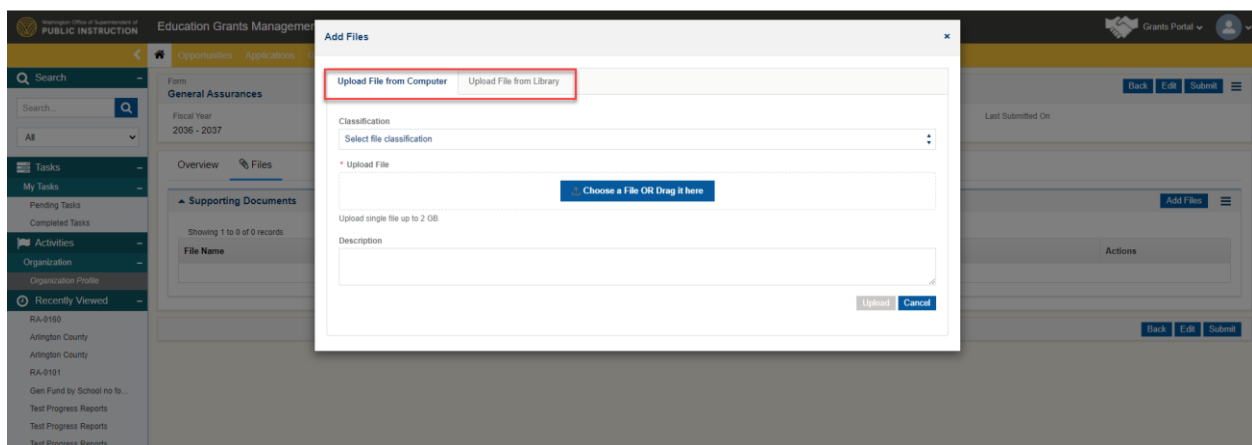
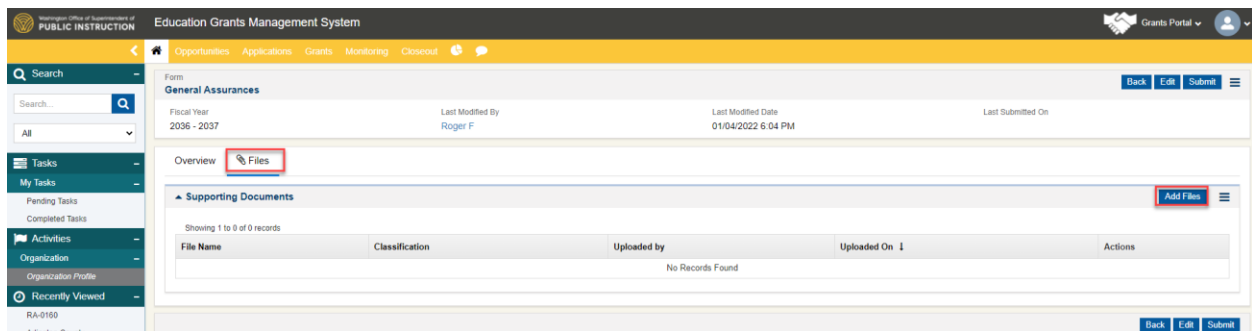
Figure 48: Assurances Fiscal Year

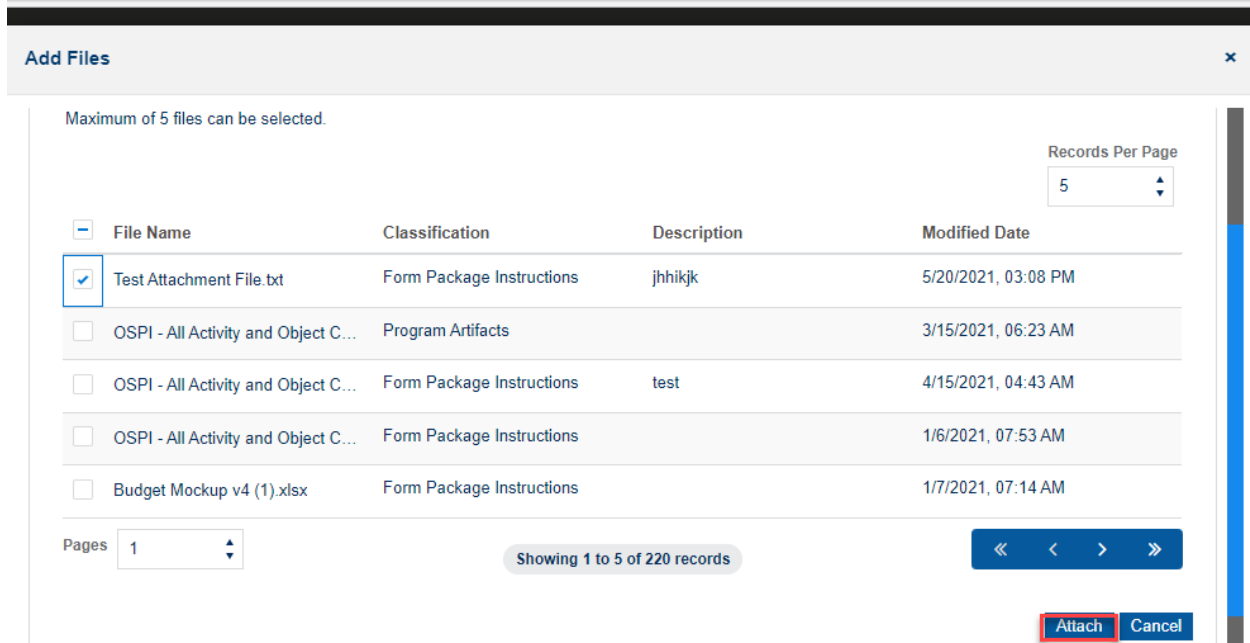
Scroll down and complete the Certification by filling out the required information- **Authorized Representative, representative Title, Agreed on, Superintendent/CEO Representative, and Agreed on date.** Once this is completed, click on **Save.**



**Figure 49: Certification**

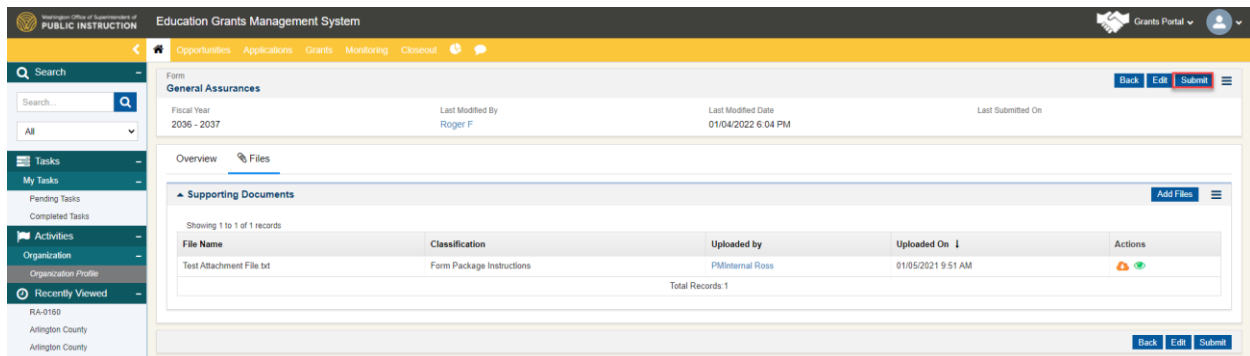
Navigate to **Files** tab, to add the documents – optional step. Click **Add Files** button to add the document. A new modal window opens, and you can choose to **Upload File from a Computer** or **Upload a file from Library**.





**Figure 50: General Assurances Files**

After completing all requirements click on **Submit**.



**Figure 51: Submitting the General Assurances Form**

## 8.4 CONVERTING OPPORTUNITY TO PRE-APPLICATION

Once the Opportunity is qualified, the system will present you with the **Create Pre-Application** (If Required) and **Create Application** buttons.

The screenshot displays the Education Grants Management System (EGMS) interface. The top navigation bar includes the Washington Office of Superintendent of PUBLIC INSTRUCTION logo, the system name, and a 'Grants Portal' dropdown. The main content area shows an opportunity titled 'Desika Formula Announcement' with a status of 'Qualified'. A red arrow points to a 'Create Pre-Application' button in the top right corner. A red box highlights this button with the text: 'From the qualified opportunity click on Create Pre-Application'. The interface also features a search bar, a left-hand navigation menu with categories like 'Tasks', 'Activities', and 'Opportunities', and a progress bar indicating the current status is 'Qualified'. Below the progress bar, there are tabs for 'Overview', 'Financials', 'Attachments', 'History', and 'Collab'. The 'Opportunity Information' section lists details such as Opportunity Name, Type (Formula), Program ID (PG-CSPR-0560), and Form Package Type (Federal grant). The 'Opportunity Specific Settings' section includes fields for Subrecipient Match Required? (Yes), Subrecipient Match? (25.00%), Program Income Applicable? (Yes), Pre-Application (SAS) Required? (Yes), Focus Area Required? (Yes), Risk Assessment Required? (Yes), Are Expense Details Required on Reimbursements? (Yes), and Negotiations Allowed? (Yes).

**Figure 52: Create Pre-Application**

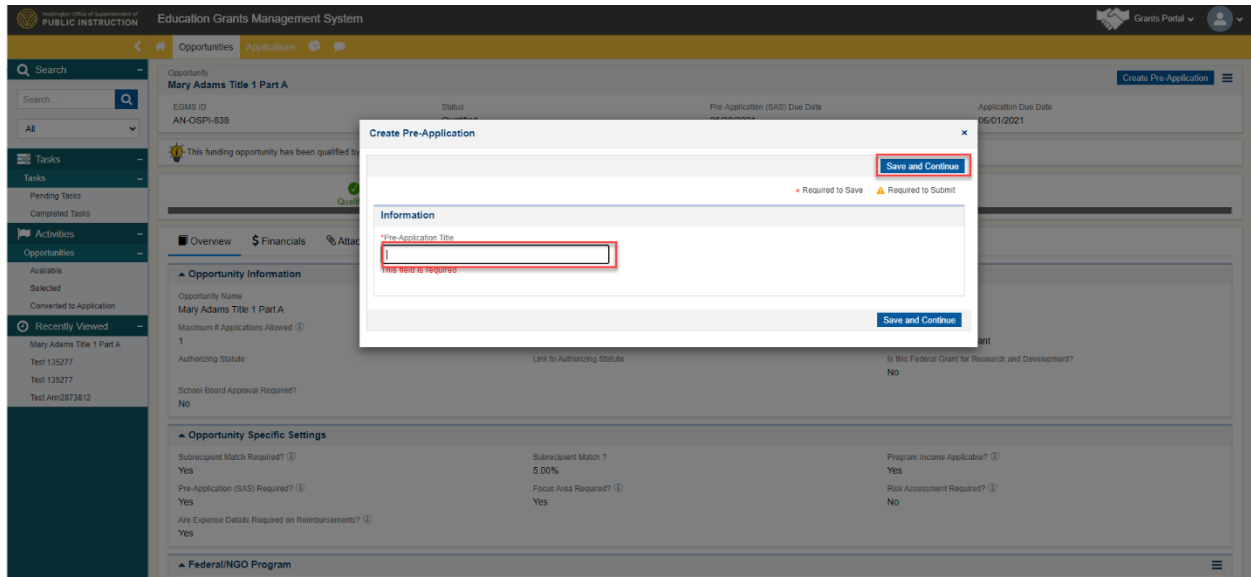
- If Pre-Application is required, click the Create Pre-Application button.
- If Pre-Application is not required, click the Create Application button.

## 9 APPLICATION

### 9.1 COMPLETING A PRE-APPLICATION

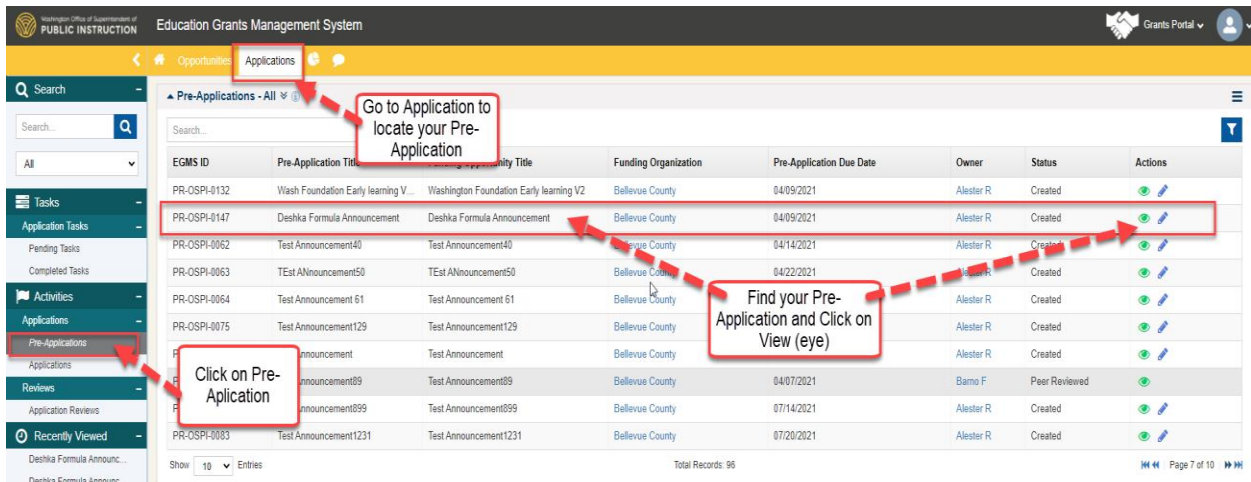
After clicking the **Create Pre-Application** button to convert the opportunity to a Pre-Application, the system directs you to the Create Pre-Application modal window. On the Create Pre-Application modal, the title will be auto populated but is editable. Click the **Save and Continue** button to add further required details.





**Figure 53: Create Pre- Application modal**

To return to a pre-application you have been working with, navigate to the Applications tab and select Pre-application from left navigation menu. The content page will display a table with all Pre-applications. Use the quick search feature to find your pre-application by entering the pre-application title or EGMS ID. You can view or continue to edit your pre-application by selecting the pencil edit icon.



**Figure 54: Locating Pre-Application**

The system will direct you to the created Pre-Application page in **Edit** mode.

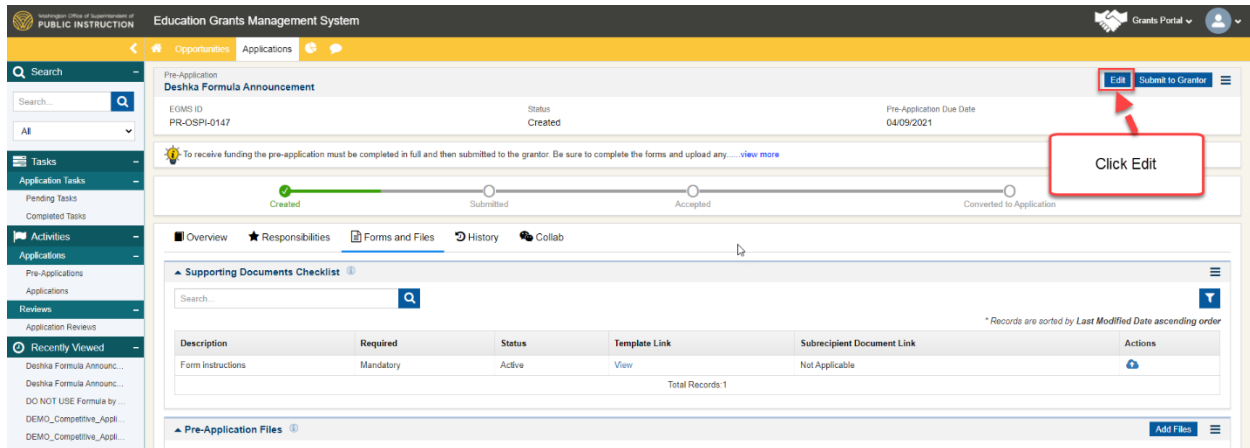


Figure 55: Edit Pre-Application

### 9.1.1 OVERVIEW TAB

On the **Overview** tab, navigate to the **Pre-Application Overview** section and enter the required information, such as the Pre- Application Title.

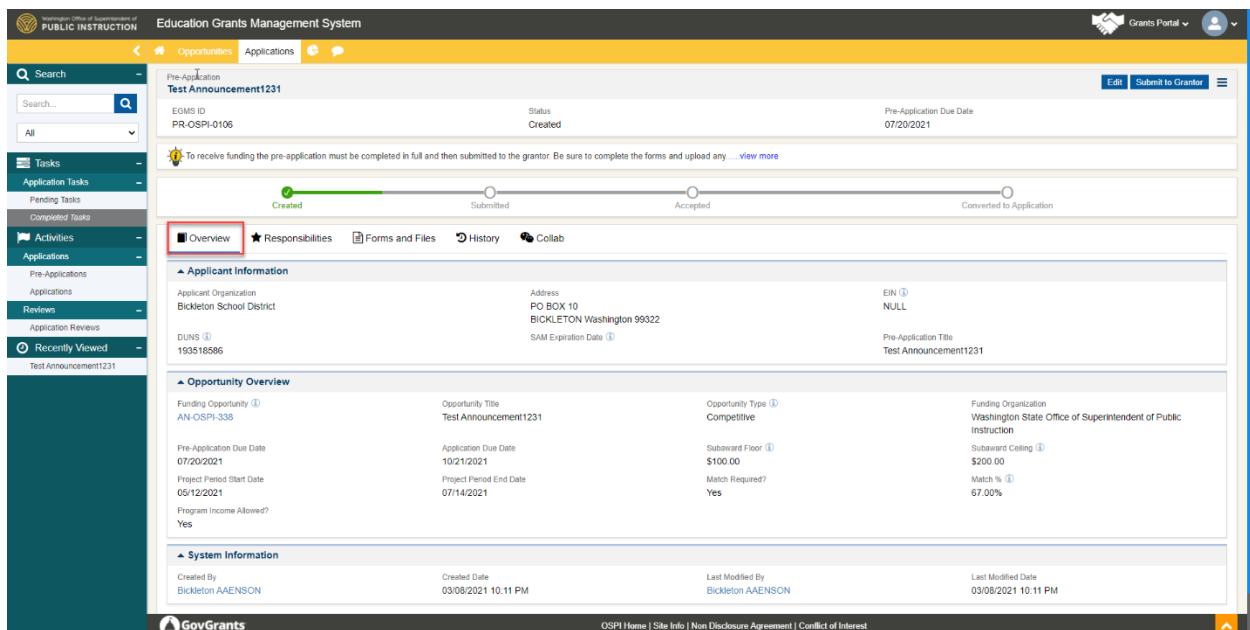
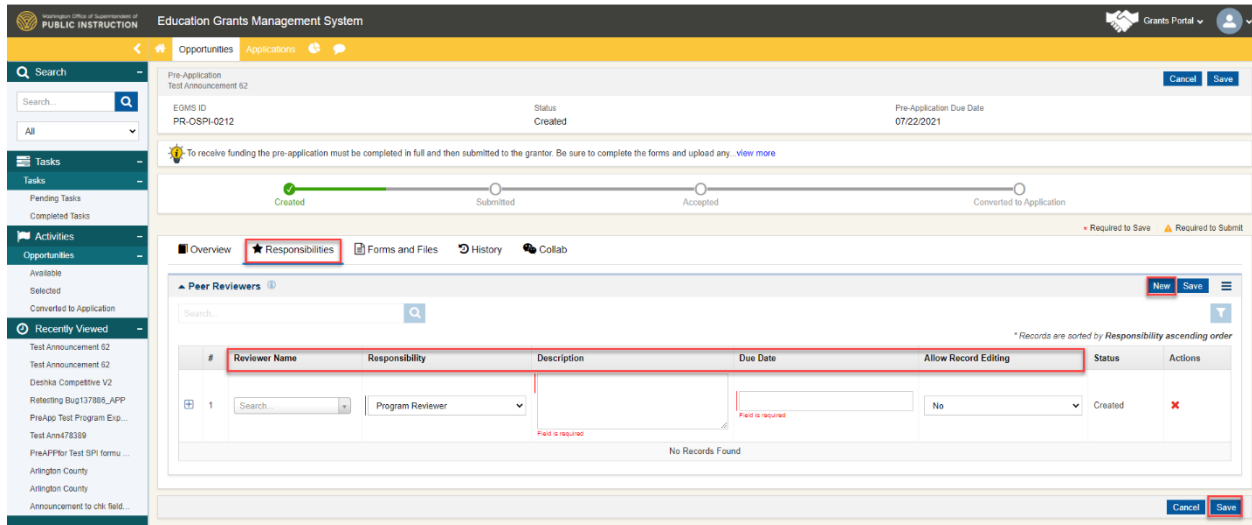


Figure 56: Complete Pre-Application Overview

### 9.1.2 RESPONSIBILITY TAB

In the responsibility tab you can optionally assign a peer reviewer with whom you can collaborate on this application. To assign a peer reviewer navigate to the **Responsibilities** tab and select **New** in the top-right corner. Enter **Reviewer Name**, **Responsibility**, **Description** and **Due Date** for the review. Select whether you will **Allow Record Editing** by the reviewer. By selecting "Yes", the reviewer will be able to edit the pre-

application fields and related forms. When all reviewer details are entered, click **Save**. You can repeat the same process to add multiple reviewers.



**Figure 57: Adding Peer Reviewers**

### 9.1.3 FORMS AND FILES TAB

The **Forms and Files tab** includes the following sections:

**Supporting Documents and checklist** section. In this section applicants can download templates provided by OSPI by clicking on the template link and upload them via the upload icon under the actions column after they have populated the template. These templates can be either mandatory or optional. If mandatory the system will not allow you to submit until you upload the completed template.

**Pre-Application files** section. This section allows you to upload any type of files required in the application.

**Notes** section. This section allows you to create and store notes that will remain as a permanent record associated to the application.

**Forms** section. This section includes the actual forms/pages that capture the required information necessary to apply for the award. As an applicant you are required to complete all forms listed in this section unless otherwise indicated in the opportunity.

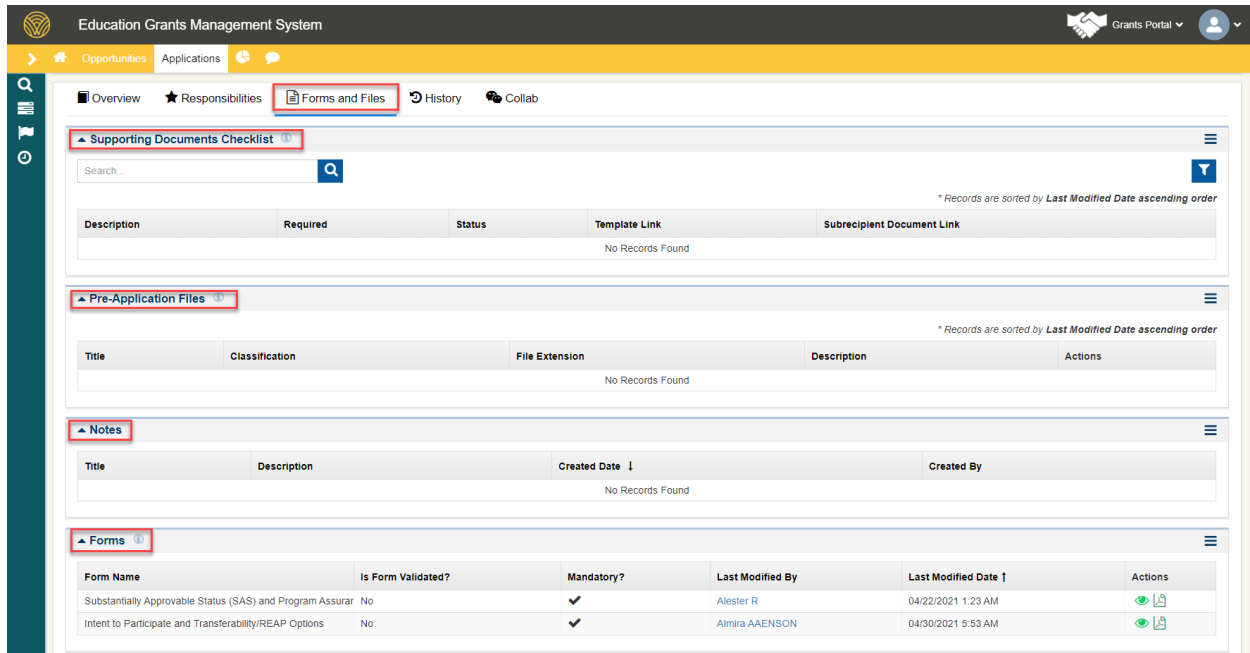


Figure 58: Forms and Files tab sections

## FORMS SECTION

To complete a form, navigate the **Actions** column in the forms section where you can select to view or edit the form by clicking on the corresponding icon.

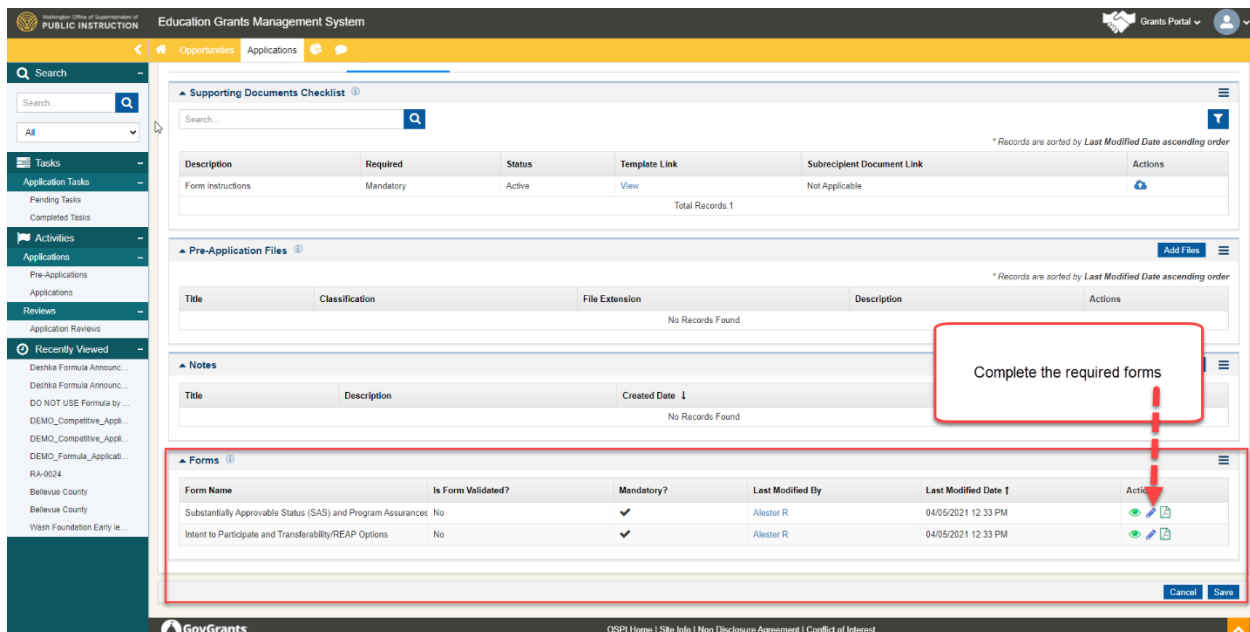


Figure 59: Edit the required forms

The following is a step-by-step example for completing a form. After navigating to the Forms section and clicking on the pencil edit icon, the system will open the form in edit mode. All forms will include a header section that includes the name of the form, validation status – yes/no, a last modified by, and

last modified date. A second common section for all forms is the Organization and Pre-application/Application information section that includes the applicants organization information. The rest of the sections will be unique to each form.

The system allows you to navigate between forms via a toggle located in the top right of every form.

The screenshot displays the 'Intent to Participate and Transferability/REAP Options' form. At the top right, there is a dropdown menu with the text 'Intent to Participate and Transferability/REAP Options'. A red dashed arrow points to this dropdown, and a red-bordered callout box contains the text: 'Click on the drop down and choose the next form that has to be completed'. The form includes sections for 'Organization and Pre-Application Information', 'Pre-Application Focus Areas/Programs', and 'Pre-Application Transferability Details'. A table lists focus areas with columns for ID, Name, Allocations, and Intent to Participate.

| Focus Area/Program ID | Focus Area/Program T | Preliminary Allocations | Transferred Out Amount | Transferred In Amount | Revised Allocation | Intent to Participate | Actions |
|-----------------------|----------------------|-------------------------|------------------------|-----------------------|--------------------|-----------------------|---------|
| F-416                 | Title 1 Part A       | \$350,000.00            | \$0.00                 | \$0.00                | \$350,000.00       |                       |         |
| F-417                 | Title 1 Part D       | \$250,000.00            | \$0.00                 | \$0.00                | \$250,000.00       |                       |         |
| F-418                 | Title 2 Part A       | \$400,000.00            | \$0.00                 | \$0.00                | \$400,000.00       |                       |         |
| Total Records: 3      |                      |                         |                        |                       |                    |                       |         |

**Figure 60: Completing the Intent to Participate and Transferability /REAP Options**

After selecting the Intent to Participate and Transferability /REAP Options form navigate to the *Pre-Application Focus Areas/Programs* section and select the required option from the available dropdown on the **Intent to Participate** column - click on the action column on any of the available **Focus Area/Programs**.

Education Grants Management System

Form: Intent to Participate and Transferability/REAP Options

Is Form Validated? No | Last Modified By: Alester R | Last Modified Date: 04/05/2021 1:52 PM

Organization Name: Bellevue County | Pre-Application ID: PR-OSPI-0147 | Pre-Application Title: Deshka Formula Announcement

Pre-Application Focus Areas/Programs

To view the list of REAP eligible, private school, tribal districts go to the Files section of the related Opportunity. Applicants who select the REAP option will need to complete the REAP page, included in the full application under Title VB, Subpart 1.

| Focus Area/Program ID | Focus Area/Program T | Preliminary Allocations | Transferred Out Amount | Transferred In Amount | Revised Allocation | Intent to Participate | Actions |
|-----------------------|----------------------|-------------------------|------------------------|-----------------------|--------------------|-----------------------|---------|
| F-416                 | Title 1 Part A       | \$350,000.00            | \$0.00                 | \$0.00                | \$350,000.00       |                       |         |
| F-417                 | Title 1 Part D       | \$250,000.00            | \$0.00                 | \$0.00                | \$250,000.00       |                       |         |
| F-418                 | Title 2 Part A       | \$400,000.00            | \$0.00                 | \$0.00                | \$400,000.00       |                       |         |
| Total Records: 3      |                      |                         |                        |                       |                    |                       |         |

**Figure 61: Intent to Participate Focus Areas/ Program**

After selecting the required option from the available dropdown in the Intent to Participate column click on the **Save** button on the top of the table.

Education Grants Management System

Form: Intent to Participate and Transferability/REAP Options

Is Form Validated? No | Last Modified By: Alester R | Last Modified Date: 04/05/2021 1:52 PM

Organization Name: Bellevue County | Pre-Application ID: PR-OSPI-0147 | Pre-Application Title: Deshka Formula Announcement

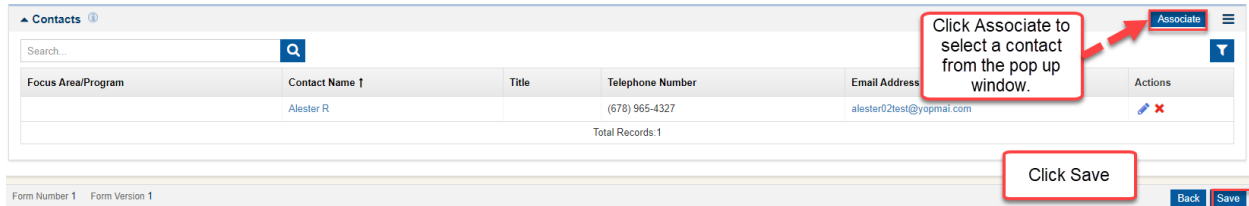
Pre-Application Focus Areas/Programs

To view the list of REAP eligible, private school, tribal districts go to the Files section of the related Opportunity. Applicants who select the REAP option will need to complete the REAP page, included in the full application under Title VB, Subpart 1.

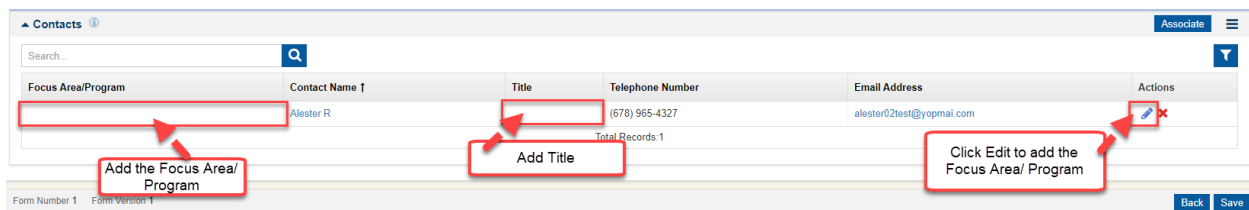
| Focus Area/Program ID | Focus Area/Program T | Preliminary Allocations | Transferred Out Amount | Transferred In Amount | Revised A    | Intent to Participate | Actions |
|-----------------------|----------------------|-------------------------|------------------------|-----------------------|--------------|-----------------------|---------|
| F-416                 | Title 1 Part A       | \$350,000.00            | \$0.00                 | \$0.00                | \$350,000.00 | No                    |         |
| F-417                 | Title 1 Part D       | \$250,000.00            | \$0.00                 | \$0.00                | \$250,000.00 | Yes                   |         |
| F-418                 | Title 2 Part A       | \$400,000.00            | \$0.00                 | \$0.00                | \$400,000.00 | Yes, with REAP        |         |
| Total Records: 3      |                      |                         |                        |                       |              |                       |         |

**Figure 62: Saving all entered data for Intent to Participate**

On the **Contacts** section, to add new contact click on the **Associate** button, select a contact from the contacts pop up window and click **Add**. Click on **Edit** icon on the action column to edit the Focus Area/ Program or title of the contact. Click on Save button. Note that the Focus Area/Program must be populated before you can validate the form.

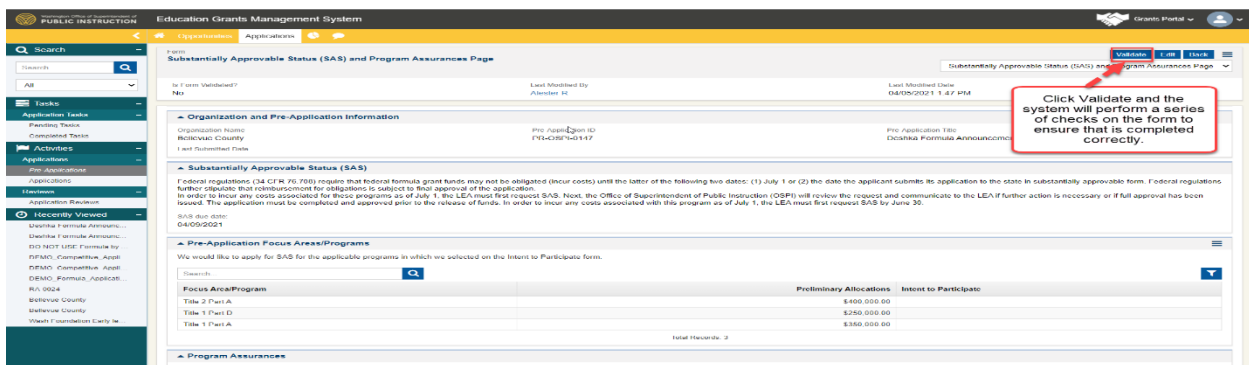


**Figure 58: Associate Contact**



**Figure 63: Edit Contact Title/ Focus Area Program**

The final step when populating a form is to validate the form. To validate a form, click the Validate button available on the top right of the form. If all the required data is entered in the form, the form will be successfully validated. This does not submit the form to the grantor, it only validates that the data was entered correctly. The 'is the form validated' field will change from **No** to **Yes** when the form is successfully validated.



**Figure 60: Validate the forms**

## NOTES SECTION

If you have any supporting documentation or notes that are relevant to the Pre-Application process they can be included under the Forms and Files tab. Click on **Add** to add the newly created notes.

The screenshot shows the 'Education Grants Management System' interface. The left sidebar contains navigation options like 'Tasks', 'Activities', and 'Recently Viewed'. The main content area is divided into three sections: 'Supporting Documents Checklist', 'Pre-Application Files', and 'Notes'. The 'Notes' section at the bottom has a table with columns for 'Title', 'Description', 'Created Date', and 'Created By'. A red box highlights the 'Add' button in the top right corner of the 'Notes' section.

Figure 64: Add Notes

### 9.1.4 History tab

Navigate to the **History** tab. Once the pre-application is converted to an application, the snapshot will be attached here to download. This section will also list field history for up to 20 fields from the Pre-Application object to be tracked. The field history tracks the old value, the new value and change by and changed on values. These 20 fields are selected by OSPI when configuring the system.

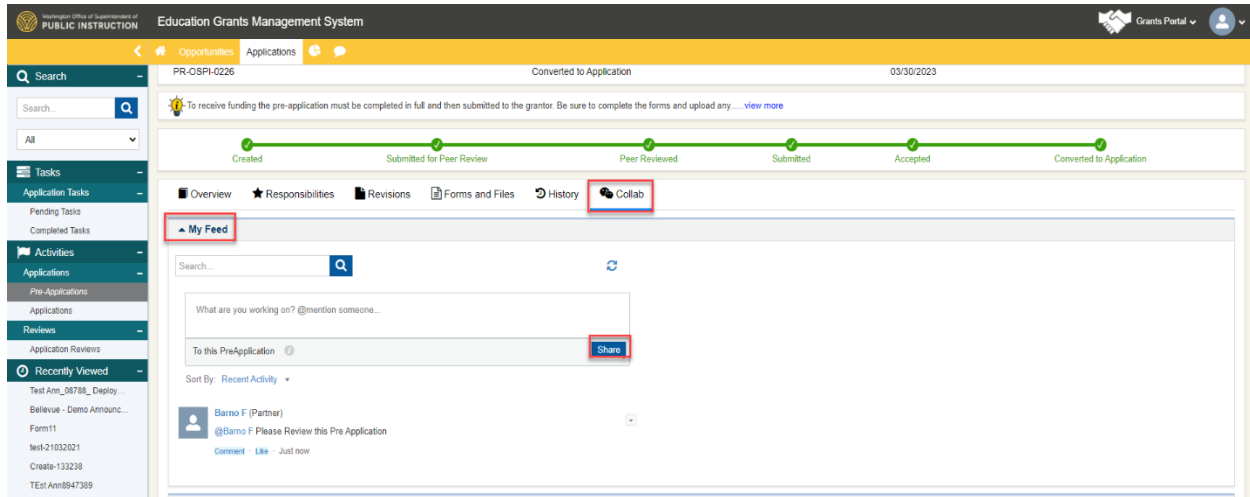
The screenshot shows the 'Education Grants Management System' interface with the 'History' tab selected. The top section displays 'Pre-Application: PreApp Test Program Expenditures Form' with details like 'EGMS ID: PR-OSPI-0204' and 'Status: Converted to Application'. A progress bar shows the stages: Created, Submitted, Accepted, and Converted to Application. Below the progress bar, the 'History' tab is highlighted with a red box. The 'Field History' section shows a table with columns for 'EGMS ID', 'Changed Field', 'New Value', 'Old Value', 'Changed By', and 'Changed On'. The 'Snapshot History' section shows a table with columns for 'File Name', 'Date Taken', and 'Taken By'. The 'Comments' section shows a 'Grantor Comment' with the text 'aaa'.



**Figure 62: Snapshot History**

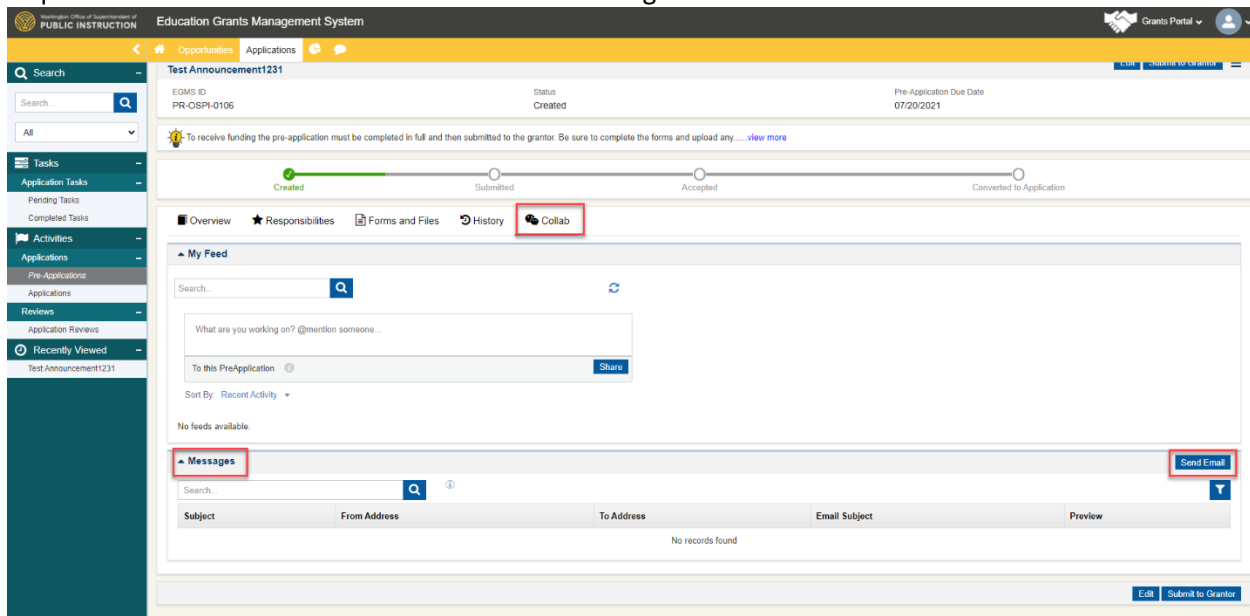
### 9.1.5 COLLAB TAB

On the **Collab** tab, you can share feeds and send emails. To share feeds, add the required details in **My Feed** section and click on the **Share** button. Note that if you want the feed to be addressed to a specific registered user you can enter @ followed by the individuals name. The recipient of this feed will also receive an email letting them know they have been sent a My Feed chatter message.



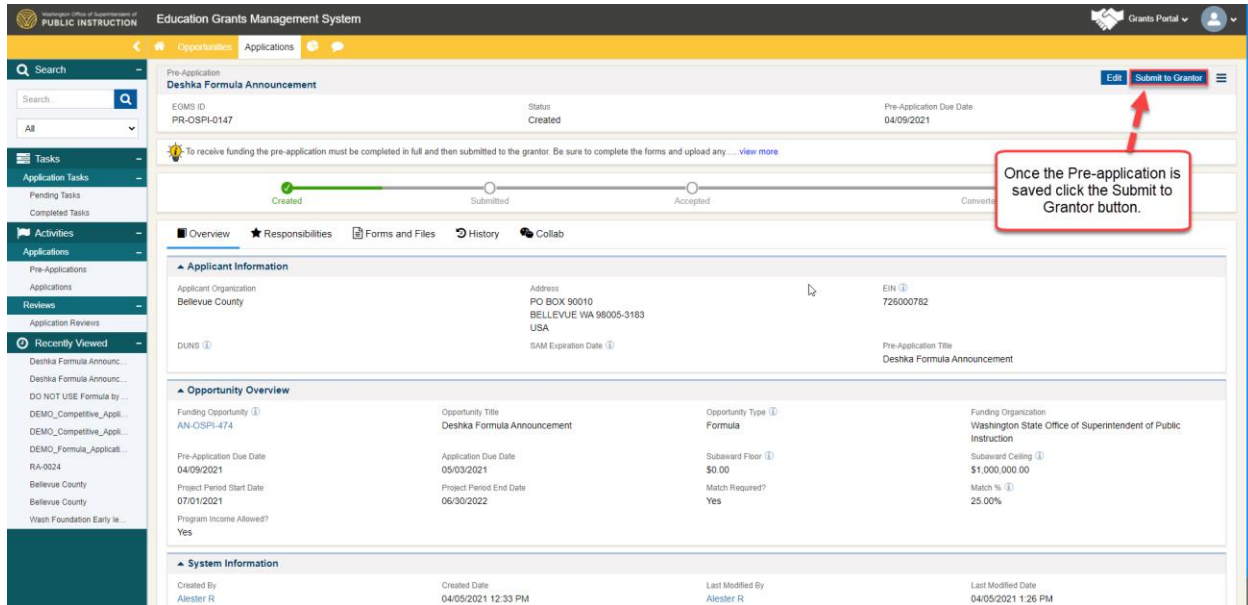
**Figure 65: Share My Feed**

To send the emails/message, navigate to **Messages** section. Click on the **Send Email** button to add the required details. Click **Send** button to send the message.

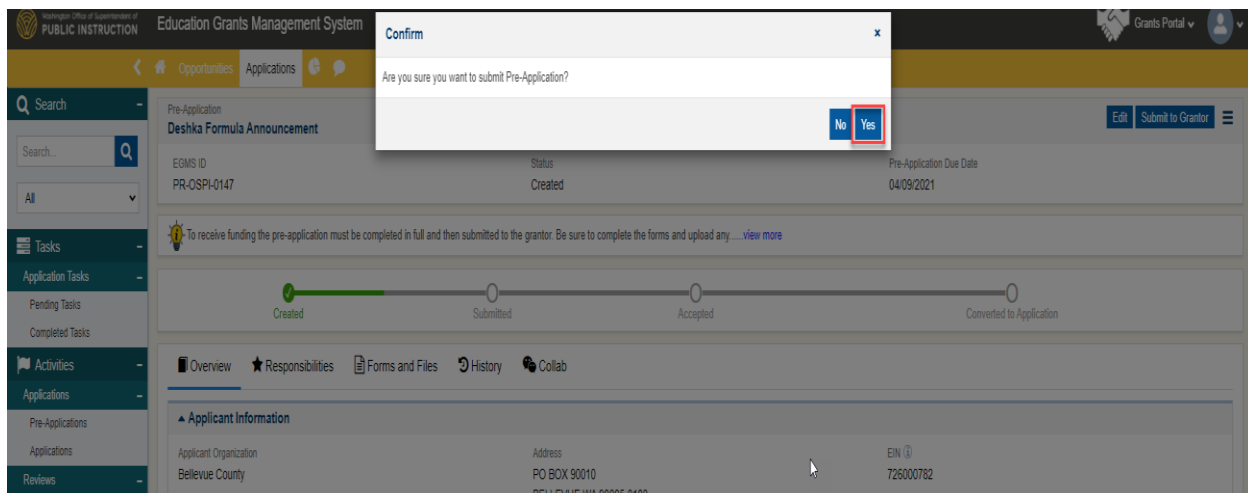


**Figure 66: Send Email**

Once you have entered or uploaded all required information throughout the different tabs and in the forms, click the **Submit to Grantor** button. If the submission is successful, the grantor will receive an email notification and a task generated to review the pre-application.



**Figure 67: Submit Pre-Application to Grantor**

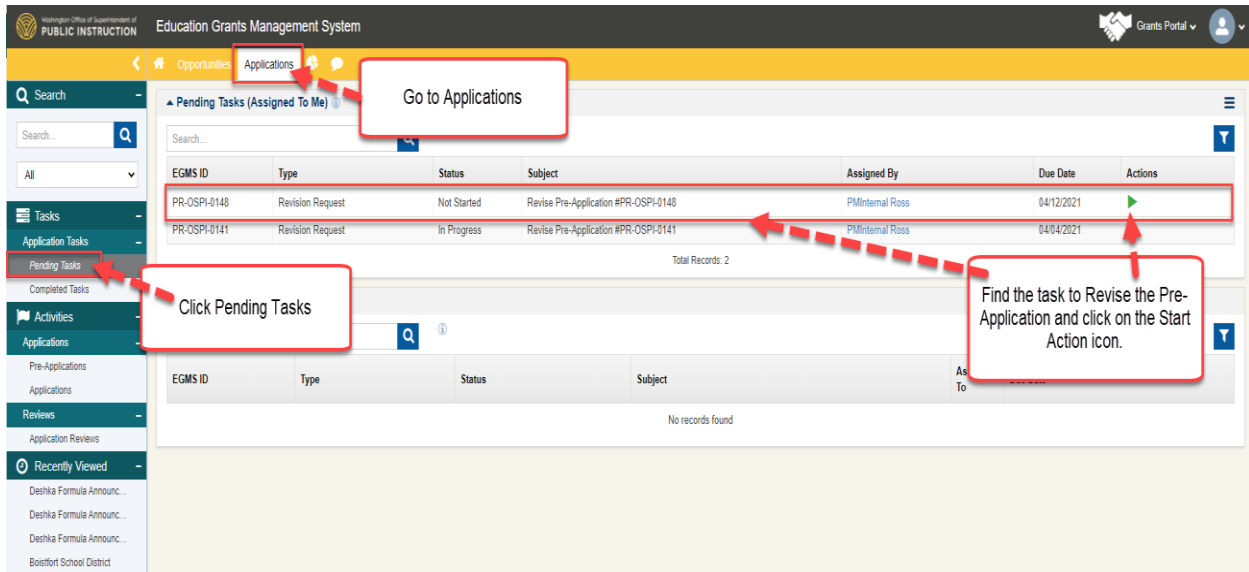


**Figure 68: Submission Confirmation**

### 9.1.6 PRE-APPLICATION REVISIONS

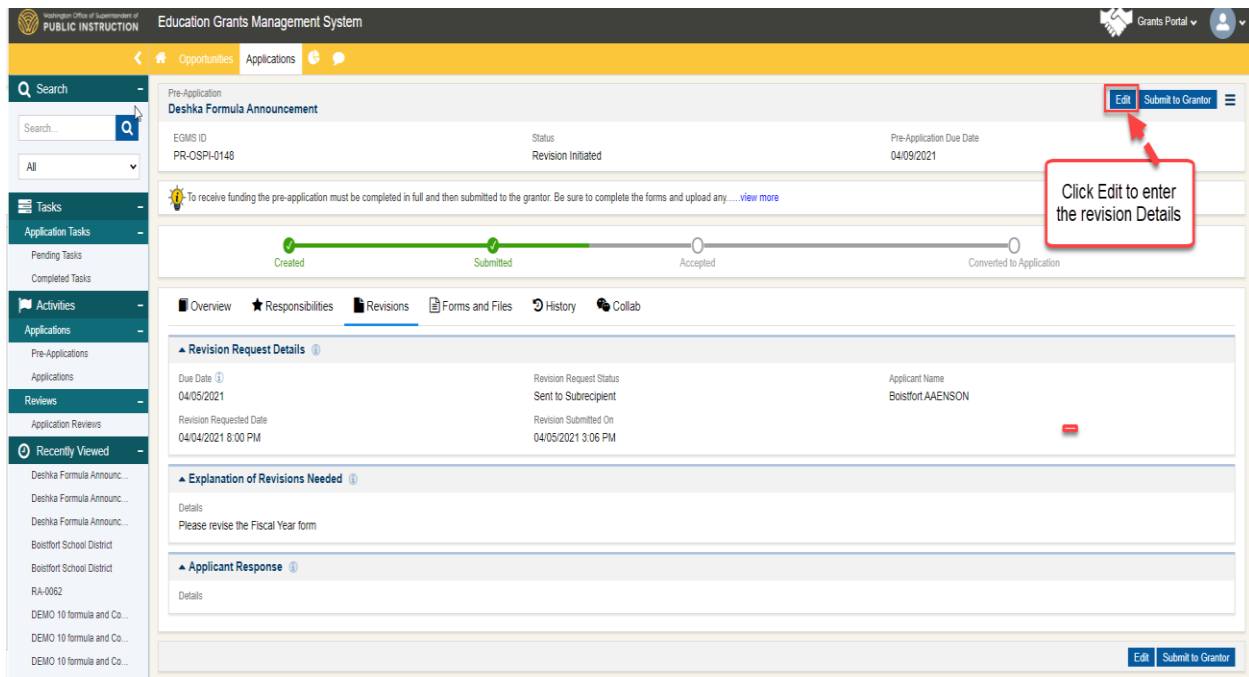
OSPI announcement owner can request a revision to be made on the Pre-Application. The Pre-Application record owner (user that submitted pre-application) will receive an email notification and a

pending task to revise and re-submit the pre-application. To access the revision task, navigate to the **Applications** tab and select 'Pending Tasks' on left navigation menu. Find the *Revision Request* task under the 'Type' column and click on the green start action icon.



**Figure 69: Pre-Application Revision**

The system will take you to a Revisions tab where you can see the revision request details and enter your response. The revision request details will indicate what tabs or forms are open for you to edit. You will not be able to edit any tab or form details if it was not requested to be revised by the grantor.



**Figure 70: Edit revision Details**

Revision details are required to be entered under Applicant Response section before you can re-submit the pre-application to the grantor.

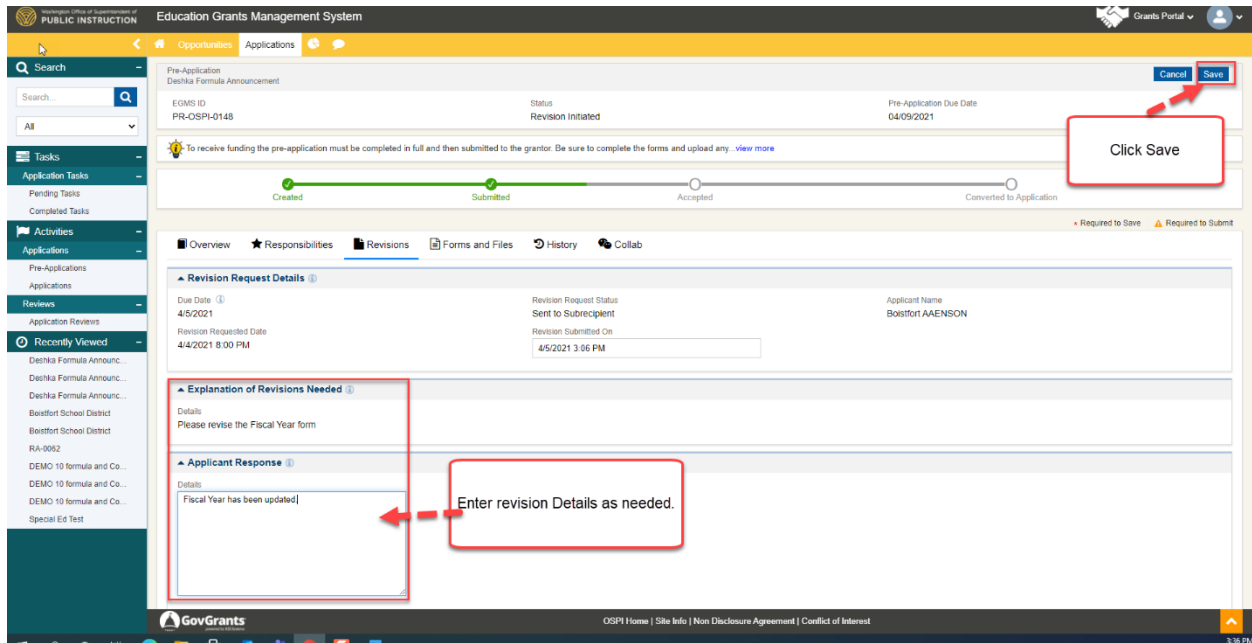


Figure 71: Save revision Details

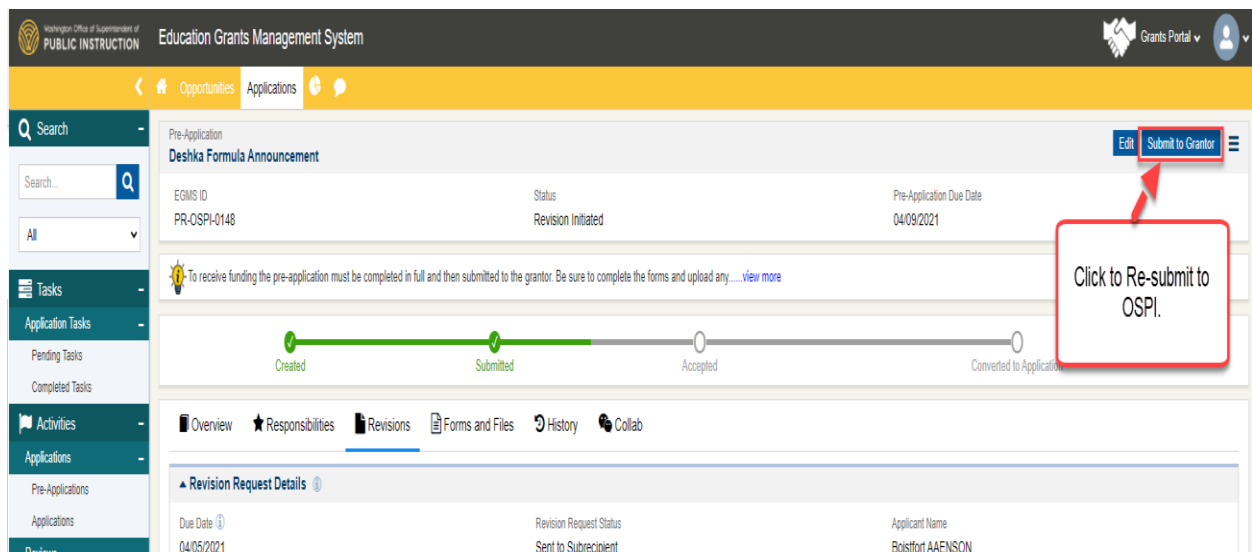
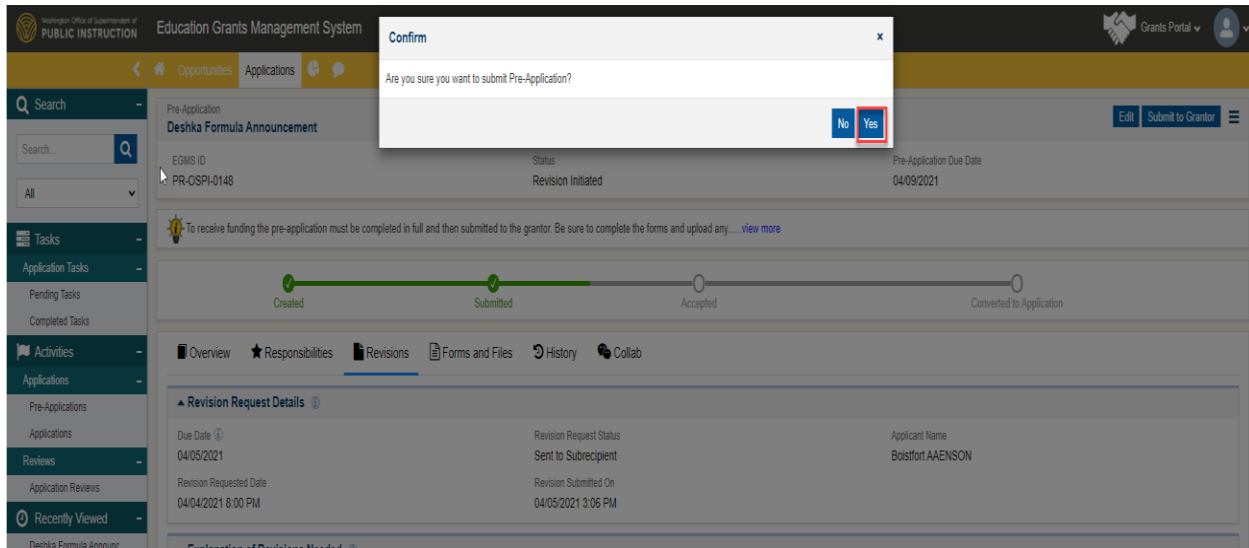


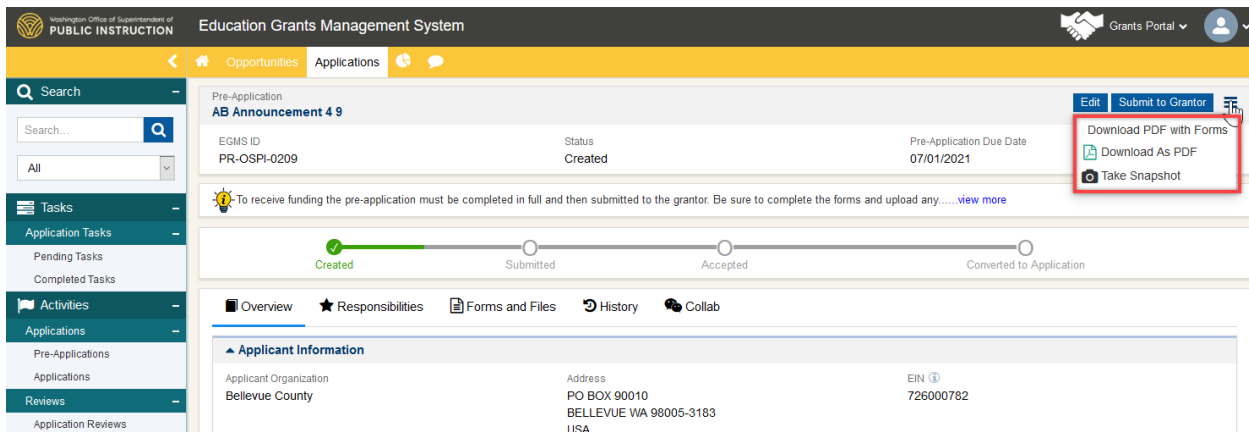
Figure 72: Submit to Grantor



**Figure 73: Submission Confirmation**

## DOWNLOADING PRE-APPLICATION INCLUDING ALL FORMS AS A PDF

From the Pre-Application record, click on the **Hamburger** (☰) icon.



**Figure 74: Download PDF with Forms**

- **Note:** You will see a success message as follows: The PDF file you requested is being processed and will be available within few minutes in the "Forms and Files" tab, under the Pre-Application Files section.

Click on the **Forms and Files** tab. Scroll to the "Pre-Application Files" section to Download, View, edit, or Remove the PDF.

## 9.2 COMPLETING AN APPLICATION

### 9.2.1 CREATE APPLICATION FROM PRE-APPLICATION

After the pre-application has been accepted by the Grantor you will receive an email notification and a task to create the application. To access the task, navigate to the HOME tab and select Pending Task from the left navigation menu. Select the Green **Play** arrow that appears under the Actions column.

| EGMS ID      | Task Type                                    | Subject                                      | Created By      | Due Date   | Actions |
|--------------|--|--|-----------------|------------|---------|
| PR-OSPI-0012 |  | Review Recipient Pre-Application for Anno... | Roger F         | 01/29/2021 | ▶       |
| AP-OSPI-114  | Negotiation Request                          | Revise Application #AP-OSPI-114 for Fund...  | PMInternal Ross | 02/15/2021 | ▶       |
| PR-OSPI-0177 | Create Application                           | Create Application for Funding Opportuni...  | PM Raunak       | 04/06/2021 | ▶       |
| PR-OSPI-0193 | Create Application                           | Create Application for Funding Opportuni...  | PMInternal Ross | 04/09/2021 | ▶       |
| PR-OSPI-0211 | Revise Pre-Application                       |  | PMInternal Ross | 04/16/2021 | ▶       |
| PR-OSPI-0207 | Revise Pre-Application                       |  | PMInternal Ross | 04/16/2021 | ▶       |
| PR-OSPI-0207 | Revise Pre-Application                       |  | PMInternal Ross | 04/16/2021 | ▶       |
| PR-OSPI-0214 | Revise Pre-Application                       | Revise Pre-Application #PR-OSPI-0214         | PMInternal Ross | 04/17/2021 | ▶       |
| PR-OSPI-0214 | Review Recipient Pre-Application for Anno... |  | Roger F         | 04/12/2021 | ▶       |
| AP-OSPI-380  | Application Revision Request                 | Revise Application #AP-OSPI-380 for Fund...  | PM Raunak       | 04/17/2021 | ▶       |

**Figure 75: Task to create Application from Pre -Application**

This task will take you to the accepted pre-application where a Create Application button will be available on top right of screen, click on the **Create Application**.

Pre-Application  
**Announcement to chk field history** [Create Application](#)

EGMS ID: PR-OSPI-0193 | Status: Accepted | Pre-Application Due Date: 04/15/2021


**Progress:** Created (✓) → Submitted for Peer Review (✓) → Peer Reviewed (✓) → Submitted (✓) → Accepted (✓) → Converted to Application (○)

**Applicant Information:**

|  |  |  |
|--|--|--|
| Applicant Organization: Arlington County | Address: 315 N. French Avenue, Arlington VA 98223, USA | EIN: 726000789   |
| DUNS: 838114890                          | SAAM Expiration Date:                                  | Pre-Application Title: Announcement to chk field history |

**Figure 76: Converting Pre- application to Application**

## 9.2.2 CREATE APPLICATION FROM OPPORTUNITY

Clicking on the **Available** Opportunities in the left navigation pane you will find a published announcement that you are interested in and then click on the View () icon. You will be taken to the opportunity record and after carefully reviewing all details click on the **Qualify** to pursue the opportunity.











| EGMS ID     | Opportunity Name           | Type        | Opportunity Release Date | Application Due Date | Status    | Actions   |
|-------------|----------------------------|-------------|--------------------------|----------------------|-----------|---|
| AN-OSPI-382 | Test Announcement6798      | Competitive | 03/08/2021               | 07/14/2021           | Published |  |
| AN-OSPI-578 | Test_R_OER_9               | Competitive | 03/25/2021               | 07/01/2021           | Published |  |
| AN-OSPI-322 | Test Announcement Demo4    | Competitive | 02/25/2021               | 06/23/2021           | Published |  |
| AN-OSPI-325 | TEst ANnouncement167       | Competitive | 02/25/2021               | 06/23/2021           | Published |  |
| AN-OSPI-396 | Test Announcement_01       | Competitive | 03/09/2021               | 06/16/2021           | Published |  |
| AN-OSPI-388 | Test Announcement999       | Competitive | 03/08/2021               | 06/10/2021           | Published |  |
| AN-OSPI-332 | Test ANnouncement689       | Formula     | 02/26/2021               | 05/19/2021           | Published |  |
| AN-OSPI-364 | Test Announcement67        | Formula     | 03/03/2021               | 05/12/2021           | Published |  |
| AN-OSPI-397 | Test Announcement580       | Competitive | 03/09/2021               | 05/12/2021           | Published |  |
| AN-OSPI-042 | OSPI CTE Announcement 2021 | Competitive | 01/19/2021               | 05/01/2021           | Published |  |

Figure 77: Select an Opportunity

**Mary Adams Competitive**

EGMS ID: AN-OSPI-839 | Status: Published | Pre-Application (SAS) Due Date: | Application Due Date: 06/30/2021

**Opportunity Information**

|                                |                             |   |
|--------------------------------|-----------------------------|---|
| Opportunity Name               | Type                        | Program ID  |
| Mary Adams Competitive         | Competitive                 | PG-OSPI-0600  |
| Maximum # Applications Allowed | Program Type                | Form Package Type                                   |
| 1                              | Competitive Grants          | Federal competitive grant                           |
| Authorizing Statute            | Link to Authorizing Statute | Is this Federal Grant for Research and Development? |
|                                |                             | No  |

**Opportunity Specific Settings**

|                              |                        |                         |
|------------------------------|------------------------|-------------------------|
| Subrecipient Match Required? | Subrecipient Match (%) | Program Income Allowed? |
|                              |                        |                         |

Figure 78: Qualify to pursue the opportunity

Note: If your organization does not meet the eligibility type the system will require you to confirm if you want to continue as seen in screenshot below.

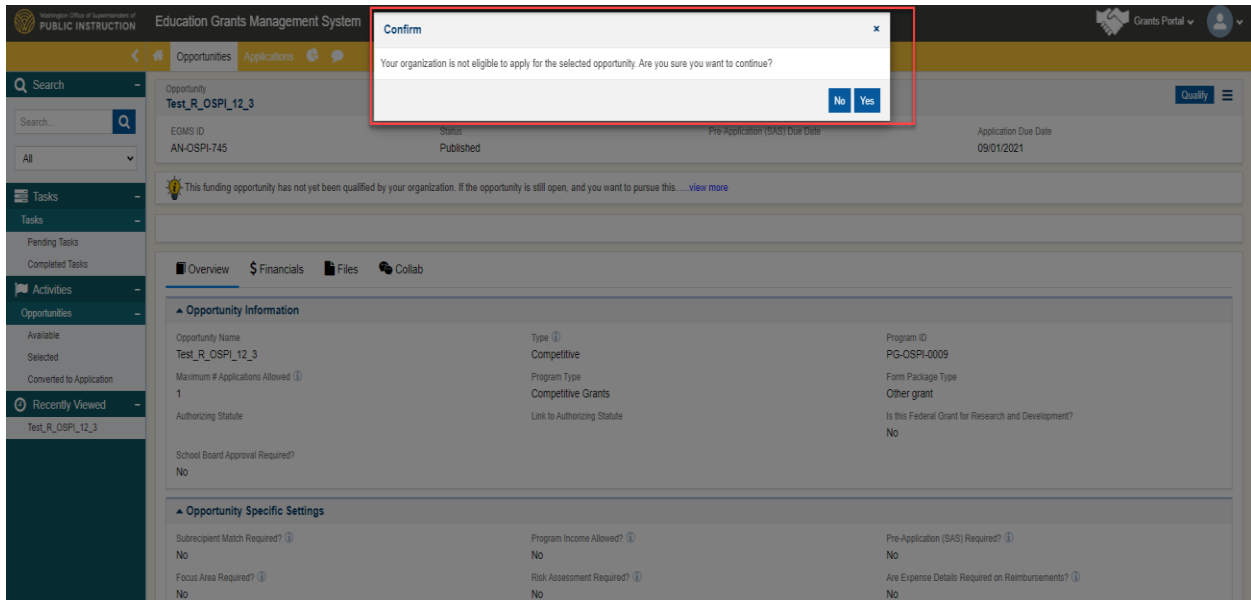


Figure 79: Confirm if you want to continue

From the Qualified (Selected) Opportunity record, you will see either a **Create Pre-Application** or a **"Create Application"** button, as applicable for the opportunity. Click **Create Application**.

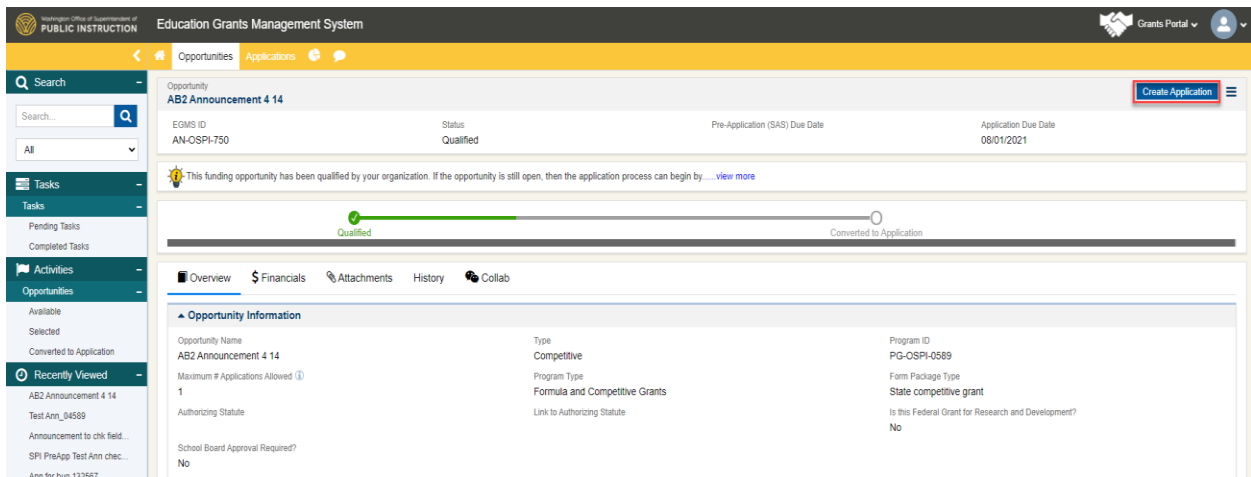


Figure 80: Create Application

After you have Click on the **Create Application** button you will be taken to the create application modal window. Click on the **Save and Continue** button.



**Create Application**
✕

Save and Continue

\* Required to Save    ⚠ Required to Submit

**Application Information**

\*Application Title

AB - Title Announcement 2022

Save and Continue

**Figure 81: Application Information**

Upon saving information in the Create Application modal, additional tabs are displayed. The application will be in edit mode.

The screenshot shows the 'Education Grants Management System' interface. The main navigation bar includes 'Opportunities' and 'Applications'. The 'Applications' tab is active, showing a progress bar with stages: Created, Submitted, and Converted to Award. Below the progress bar, there are tabs for 'Overview', 'Budget', 'Responsibilities', 'Forms and Files', 'History', and 'Collab'. The 'Overview' tab is selected, displaying the following information:

| Information                           |  |           |
|---------------------------------------|--|-----------|
| Applicant Organization                | Address                                  | EM ①      |
| UAT Spokane School District – ESD 101 | 4202 S. Regal<br>Spokane WA 99223<br>USA | 123456985 |
| DUNS ①                                | SAM Expiration Date ①                    |           |

**Figure 82: Application Tabs**

On the **Overview** tab you can see Information, Opportunity Overview, and Application Overview. Enter the Budget requested and the estimated program income. To associate **Applicant Contacts** click on the Associate to add a contact.

Education Grants Management System

Subaward Ceiling: \$1,000,000.00 | Estimated Project Period Start Date: 7/30/2021 | Instruction: Estimated Project Period End Date: 6/30/2022 | Match Required?: No

Program Income Allowed?: Yes

**Application Overview**

\*Application Title: Test dk | Estimated Program Income For Project Period: 0.00

**Applicant Contacts** Associate

| Project Role    | Name ↑       | Email                   | Is Key Contact | Is User | Actions |
|-----------------|--------------|-------------------------|----------------|---------|---------|
| Program Contact | Debra Oakley | dsakleyosp4@qpsmail.com | ✗              | ✓       |         |

Total Records: 1

**OSPI Contacts**

| Title | Name | Email | Business Phone | Organization | Project Role | Program |
|-------|------|-------|----------------|--------------|--------------|---------|
|-------|------|-------|----------------|--------------|--------------|---------|

**System Information**

Created By: Debra Oakley | Created Date: 4/27/2021 10:52 AM | Last Modified By: Debra Oakley | Last Modified Date: 4/27/2021 10:56 AM

Figure 83: Applicant Contacts

To add a **Project Role**, click on the **Edit** ( ) icon. If you want to remove the contact, click on the **Remove** ( ) icon.

Education Grants Management System

Subaward Ceiling: \$1,000,000.00 | Estimated Project Period Start Date: 7/30/2021 | Instruction: Estimated Project Period End Date: 6/30/2022 | Match Required?: No

Program Income Allowed?: Yes

**Application Overview**

\*Application Title: Test dk | Estimated Program Income For Project Period: 0.00

**Applicant Contacts** Associate

| Project Role    | Name ↑       | Email                   | Is Key Contact | Is User | Actions |
|-----------------|--------------|-------------------------|----------------|---------|---------|
| Program Contact | Debra Oakley | dsakleyosp4@qpsmail.com | ✗              | ✓       |         |

Total Records: 1

**OSPI Contacts**

| Title | Name | Email | Business Phone | Organization | Project Role | Program |
|-------|------|-------|----------------|--------------|--------------|---------|
|-------|------|-------|----------------|--------------|--------------|---------|

**System Information**

Created By: Debra Oakley | Created Date: 4/27/2021 10:52 AM | Last Modified By: Debra Oakley | Last Modified Date: 4/27/2021 10:56 AM


Cancel Save

Figure 84: Adding a Project Role

Scroll down to the OSPI Contacts section to view any contacts related on the Funding Announcement. To view details, click on the **View** ( ) icon.

The screenshot shows the 'OSPI Contacts' section of the Education Grants Management System. It features a search bar and a table with columns: Title, Name, Email, Business Phone, Organization, Project Role, and Program. A red box highlights the 'OSPI Contacts' tab, and another red box with an arrow points to an edit icon in the table, labeled 'To view Details'.


**Figure 85: OSPI Contacts**

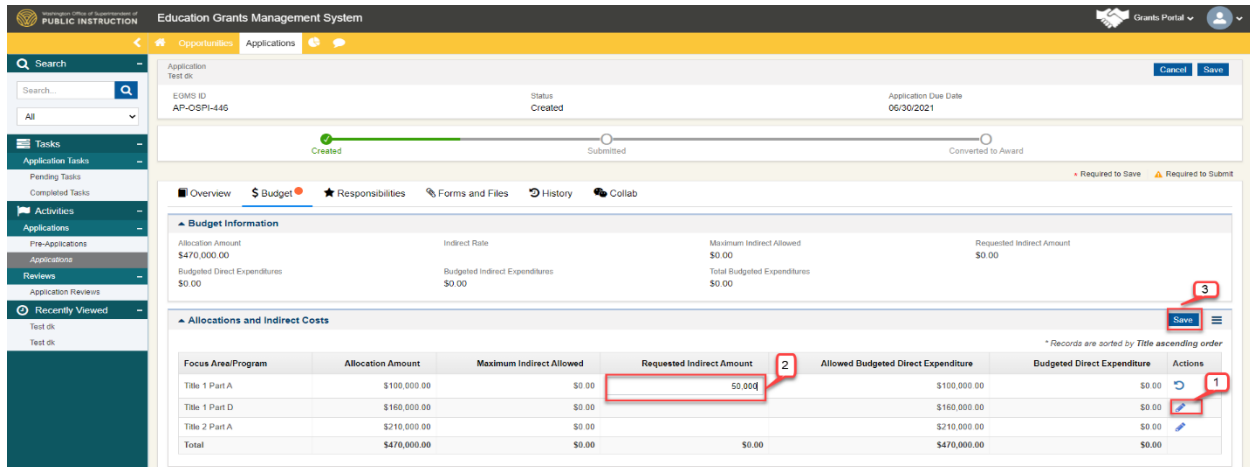
Select the **Budget** tab and navigate to down to see the Budget Information section. This section contains the Allocation Amount, indirect rate fields, and calculated fields related to the application budget. Scroll down to the Allocations and Indirect Costs section. Click the **Edit** (  ) icon to enter the Requested Indirect Amount, and **Save**.

Note: The Application’s **Budget** tab is hidden for competitive announcements. Budgets are collected later during the awarding process. Complete this step for formula or directed announcements only.

The screenshot shows the 'Budget' tab in the Education Grants Management System. It features a search bar, a sidebar, and a main content area with tabs for 'Overview', 'Budget', 'Responsibilities', 'Forms and Files', 'History', and 'Collab'. The 'Budget' tab is highlighted with a red box. Below it, the 'Budget Information' and 'Allocations and Indirect Costs' sections are visible, including a table with columns: Focus Area/Program, Allocation Amount, Maximum Indirect Allowed, Requested Indirect Amount, Allowed Budgeted Direct Expenditures, and Budgeted Direct Expenditures.

**Figure 86: Budget Tab**

Navigate to the Budget information section which contains the Allocation Amount, indirect rate fields, and calculated fields related to the application budget. Click on the **Edit** (  ) icon into the **Allocations and Indirect Cost** to enter the Requested Indirect Amount, and then click **Save**.



**Figure 87: Allocations and Indirect Costs**

**Notes:**

- When Indirect Costs are “Not Allowed” per the funding announcement, the user will be stopped from entering a requested indirect amount.
- When Indirect Costs are “Unrestricted”, “Restricted”, or “State”, the Maximum Indirect Amount will also be calculated. Users can request Indirect Costs up to the Maximum Indirect Amount.
- If the Indirect Rate Type for the related funding announcement is Unrestricted, Restricted or State, and if Maximum Indirect Rate is also provided in the announcement, then the application uses the indirect rate that is lower between the Maximum Indirect Rate and Indirect Rate (Unrestricted or Restricted or State) set for the fiscal year for the external organization.
- If the Indirect Rate Type for an announcement is either Unrestricted or Restricted or State, and if Maximum Indirect Rate is not provided in the announcement, then in the application use the indirect rate (Unrestricted or Restricted or State) set for the fiscal year for the external organization.
- If the indirect rate (Unrestricted or Restricted or State) is not set for the fiscal year for the external organization, then I cannot create the application and I see a validation message.

On the **Budget Details** section click the "+" icon to expand the template. To enter values for any budget category, click on the **Edit** ( ) icon.

- For General Fund detailed budgets, a modal window opens to enter line-item budget details. Use the "Edit" ( ) icon to add values. Click on "**Add Rows**" as needed.
- For Capital non-detailed budgets, users enter single lines per budget category.
- If budgeting is by Subcategory, you will see a button to view "**Budget Summary by Subcategory**". After clicking, the user is navigated to a report (Application Budget Summary by

Sub-Category). Click on "Run Report". It shows budget data summarized by subcategories for the application.

- If budgeting is by School, you will see a button to view "**Budget Summary by School**". After clicking, the user is navigated to a report (Application Budget Summary by School). Click on "Run Report". It shows budget data summarized by subcategories for the application.

Detailed Budget Entry Screen x

Focus Area: Title 1 Part A  
Budget Category: 22 Curriculum Supports

▲ Detailed Budget Entry Add Rows ☰

| Item                | Debit Transfer | Credit Transfer | Salaries-Certificated | Salaries-Classified | Benefits & Payroll Taxes | Supplies Instr. Resources & Non-Capitalized | Purchased Services | Travel | Capital Outlay | Award Total | Cash Match | Non-Cash Match | Total Match | Total Project Cost | Actions |
|---------------------|----------------|-----------------|-----------------------|---------------------|--------------------------|---|--------------------|--------|----------------|-------------|------------|----------------|-------------|--------------------|---------|
| Curriculum Supports | \$10,000.00    | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                      | \$0.00             | \$0.00 | \$0.00         | \$10,000.00 | \$5,000.00 | \$0.00         | \$5,000.00  | \$15,000.00        |         |
|                     | \$10,000.00    | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                      | \$0.00             | \$0.00 | \$0.00         | \$10,000.00 | \$5,000.00 | \$0.00         | \$5,000.00  | \$15,000.00        |         |

**Figure 88: Detailed Budget Entry**

As an application record owner and peer reviewer with **Edit** access, you can upload an Excel file with the Budget. Click on the **Download in Excel** to download the budget template. The records entered in the Budget details are shown in the downloaded sheet. Also, the Excel sheet shows only the columns shown in the Budget Detail section with the School Name and School Name.

The screenshot shows the 'Budget' tab selected in the application interface. The 'Budget Information' section displays the following data:

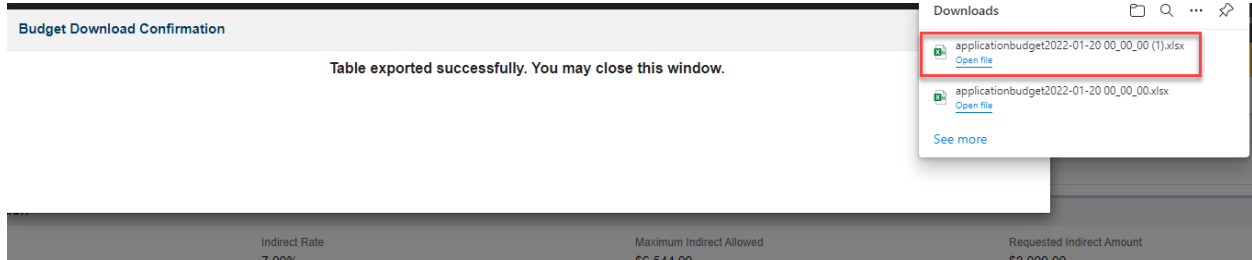
|                              |              |                                |            |                             |            |                           |            |
|------------------------------|--------------|--------------------------------|------------|-----------------------------|------------|---------------------------|------------|
| Allocation Amount            | \$100,000.00 | Indirect Rate                  | 7.00%      | Maximum Indirect Allowed    | \$6,544.00 | Requested Indirect Amount | \$3,000.00 |
| Budgeted Direct Expenditures | \$0.00       | Budgeted Indirect Expenditures | \$3,000.00 | Total Budgeted Expenditures | \$3,000.00 |                           |            |

The 'Allocations and Indirect Costs' table is also visible, showing details for various focus areas and programs.

| Focus Area/Program | Allocation Amount   | Maximum Indirect Allowed | Requested Indirect Amount | Allowed Budgeted Direct Expenditure | Budgeted Direct Expenditure | Actions |
|--------------------|---------------------|--------------------------|---------------------------|-------------------------------------|-----------------------------|---------|
| Title I, Part A    | \$50,000.00         | \$3,272.00               | \$2,000.00                | \$48,000.00                         | \$0.00                      |         |
| Title I, Part C    | \$0.00              | \$0.00                   | \$0.00                    | \$0.00                              | \$0.00                      |         |
| Title II, Part A   | \$0.00              | \$0.00                   | \$0.00                    | \$0.00                              | \$0.00                      |         |
| Title IV, Part A   | \$50,000.00         | \$3,272.00               | \$1,000.00                | \$49,000.00                         | \$0.00                      |         |
| <b>Total</b>       | <b>\$100,000.00</b> | <b>\$6,544.00</b>        | <b>\$3,000.00</b>         | <b>\$97,000.00</b>                  | <b>\$0.00</b>               |         |

At the bottom of the 'Budget Details' section, there are buttons for **Download in Excel** and **Upload Excel**.

**Figure 89: Download in Excel**



### Open the file

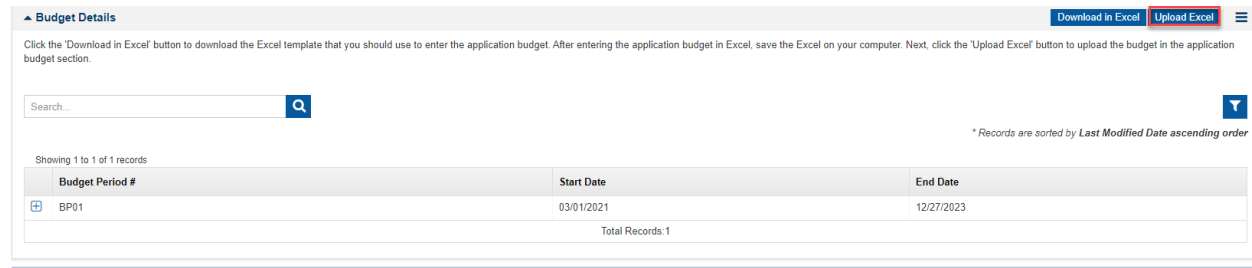
| Record Id          | Focus Area: Category               | School | School Co | Debit | Travel | Credit | Travel | Salaries-CI | Salaries-CI | Benefits & Supplies | Purchased | Travel | Capital Out | Cash Mat | Non-Cash Mat |
|--------------------|------------------------------------|--------|-----------|-------|--------|--------|--------|-------------|-------------|---------------------|-----------|--------|-------------|----------|--------------|
| a2cr0000001Q4vrAAC | Title IV, Pa 22 Curricu Intern Sch | 9999   |           | 0     | 0      | 20000  | 0      | 0           | 0           | 0                   | 0         | 9000   | 0           | 5000     | 3000         |
| a2cr0000001Q4vmAAC | Title IV, Pa 21 Staff De Arlington | 7777   |           | 0     | 0      | 10000  | 10000  | 10000       | 10000       | 10000               | 10000     | 10000  | 10000       | 2000     | 0            |
| a2cr0000001Q4vhAAC | Title III, Pa 15 Human Intern Sch  | 9999   |           | 50000 | 0      | 0      | 0      | 0           | 49000       | 0                   | 0         | 0      | 0           | 7000     | 3000         |
| a2cr0000001Q4uqAAC | Title II, Pa 13 Buisine Intern Sch | 9999   |           | 20000 | 0      | 0      | 0      | 0           | 0           | 5000                | 10000     | 20000  | 10000       | 3000     | 2000         |
| a2cr0000001Q4vcAAC | Title II, Pa 14 Financi Private Sc | 5046   |           | 0     | 0      | 10000  | 10000  | 0           | 0           | 0                   | 9000      | 0      | 0           | 1000     | 0            |
| a2cr0000001Q4m2AAC | Title I, Par 11 Board c washington | 8888   |           | 10000 | 0      | 0      | 0      | 0           | 0           | 0                   | 25000     | 0      | 1000        | 1000     | 0            |
| a2cr0000001Q4nVAAS | Title I, Par 12 Superir Arlington  | 7777   |           | 0     | 0      | 4000   | 0      | 0           | 0           | 0                   | 0         | 4000   | 0           | 4000     | 5000         |
| a2cr0000001Q4u4AAC | Title I, Par 11 Board c Arlington  | 7777   |           | 30000 | 0      | 0      | 0      | 0           | 0           | 0                   | 20000     | 0      | 5000        | 0        | 0            |
| a2cr0000001Q4naAAC | Title II, Pa 14 Financi Arlington  | 7777   |           | 0     | 0      | 0      | 0      | 0           | 0           | 0                   | 5000      | 0      | 0           | 3000     | 1000         |

**NOTE: For detailed budget 'By Subcategory' or 'By School', do not enter any value or make any changes to the existing value in the 'Reference ID' column in the downloaded excel.**

#### Notes:

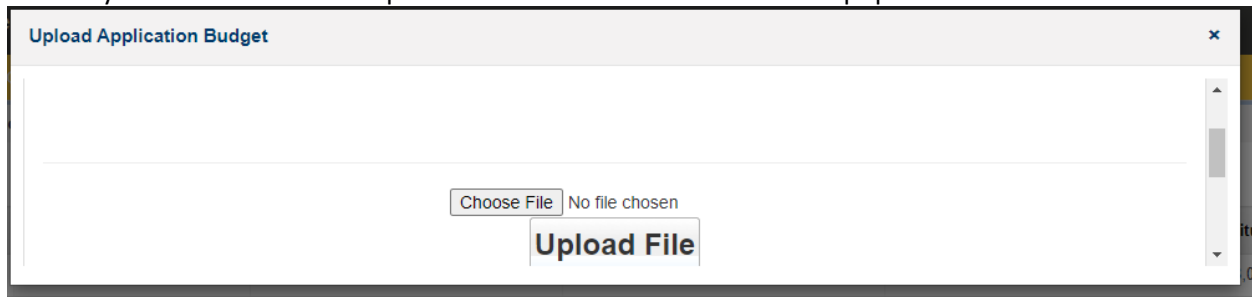
- You cannot upload an Excel with more than one row with the same combination of Focus Area and Budget Category more than once for General Budget with Detailed Budget as 'N/A' or for Capital Budget.
- You cannot upload an Excel with more than one row of Focus Area/Budget Category/School Code combination multiple times.
- You can only edit the budget with Excel Uploads but not delete.

Click on **Upload Excel** to upload the Application budget.

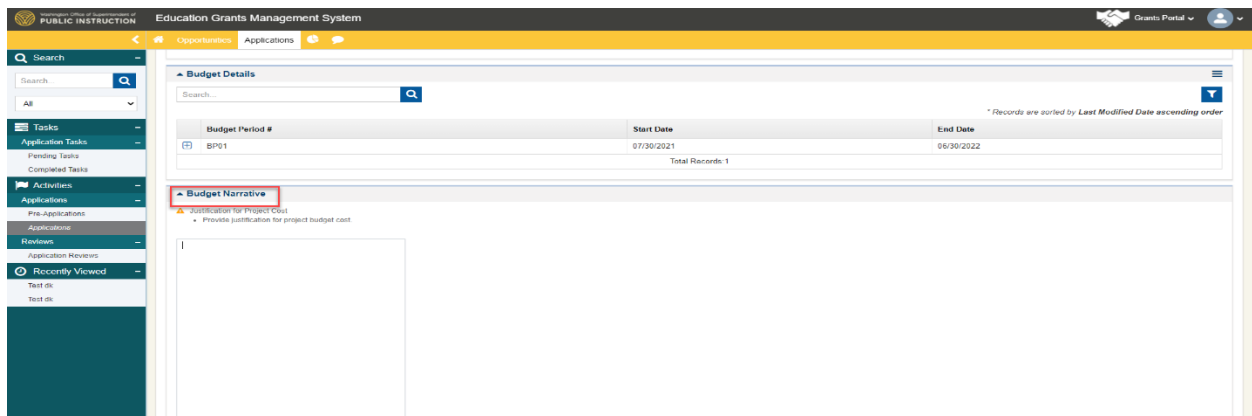


**Figure 90: Upload Excel**

Choose your File and click the Upload button. The Excel details will be populated in the section



Type the justification for project budget cost under the **Budget Narrative** section.



**Figure 91: Add Budget Narrative**


Navigate to the **Forms and Files** tab, in the Application Files section select **Add Files**.

**Figure 92: Application Files**







You can choose to **Upload File from your computer** or **Upload from a Library**. After you choose the File to be uploaded add a Description and click **Upload**.

**Figure 93: Uploading File**



On the **Forms and Files** tab complete the SAS and Program Assurances form and Transferability/REAP Options forms. Click on the **Edit** (  ) icon so you can complete the form.

**Note:** The data entered in "Intent to Participate and Transferability/REAP Options" form on the Pre-Application record is copied over to the "Transferability and REAP Confirmation" form.

| Form Name  | Is Form Validated? | Mandatory? | Last Modified By | Last Modified Date ↑ | Actions   |
|--|--------------------|------------|------------------|----------------------|---|
| (FP 876) SY 21-22 Page 2 Budget - OSSI: Targeted 3+ Continuc: No | No                 | ✓          | Debra Oakley     | 04/27/2021 10:52 AM  |    |
| (FP 876) SY 21-22 Page 1 Assurances - OSSI: Targeted 3+ Con: No  | No                 | ✓          | Debra Oakley     | 04/27/2021 10:52 AM  |    |



| Description | Required  | Template Link        | Subrecipient Document Link | Actions   |
|-------------|-----------|----------------------|----------------------------|---|
| LEA Tribal  | Mandatory | <a href="#">View</a> | Not Applicable             |  |
| 2021 OER    | Optional  | <a href="#">View</a> | Not Applicable             |  |

Figure 94: Forms








| Form Name  | Is Form Validated? | Mandatory? | Last Modified By | Last Modified Date ↑ | Actions   |
|--|--------------------|------------|------------------|----------------------|---|
| (FP 876) SY 21-22 Page 2 Budget - OSSI: Targeted 3+ Continuc: No | No                 | ✓          | Debra Oakley     | 04/27/2021 10:52 AM  |     |
| (FP 876) SY 21-22 Page 1 Assurances - OSSI: Targeted 3+ Con: No  | No                 | ✓          | Debra Oakley     | 04/27/2021 10:52 AM  |      |

Figure 95: Edit the require forms

If all the required data is entered in the form, the form will be successfully validated. This does not submit the form to the grantor, it only validates that the data was entered correctly. From the Application Form Click on the **Validate** in the top right corner. The system will check that all required data has been entered on the form. If any data is missing, you will see a red error message.

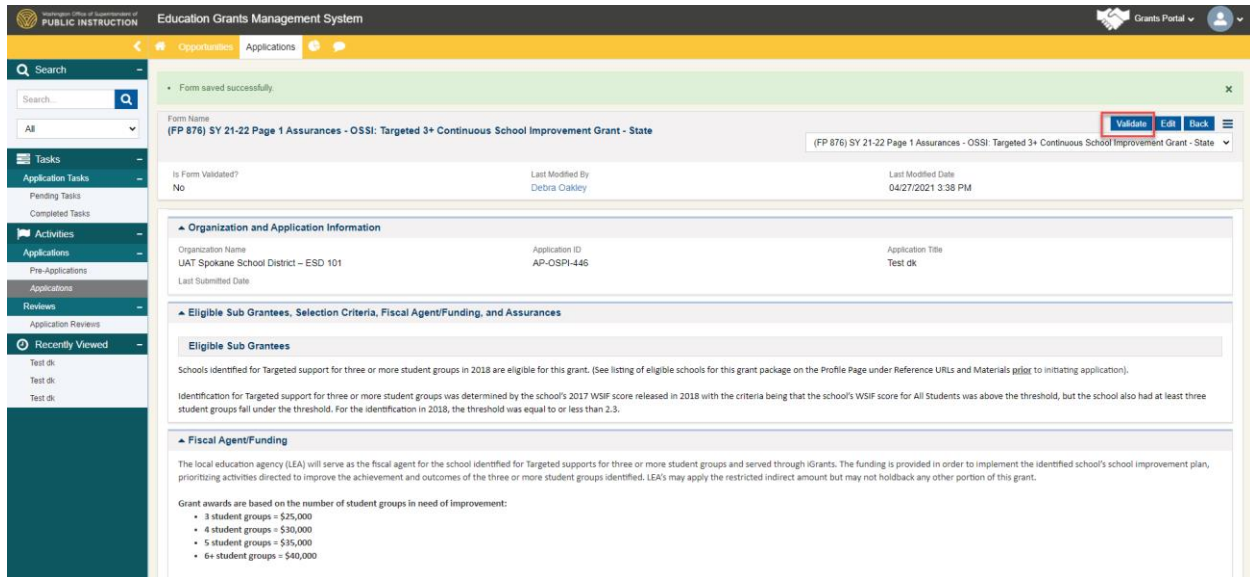


Figure 96: Validating forms

Is the form is validated? field will be changed from **No** to **Yes** when the form is successfully validated.  
 Is form validated? field will be changed from **Yes** to **No** if the user makes any changes on the validated form.

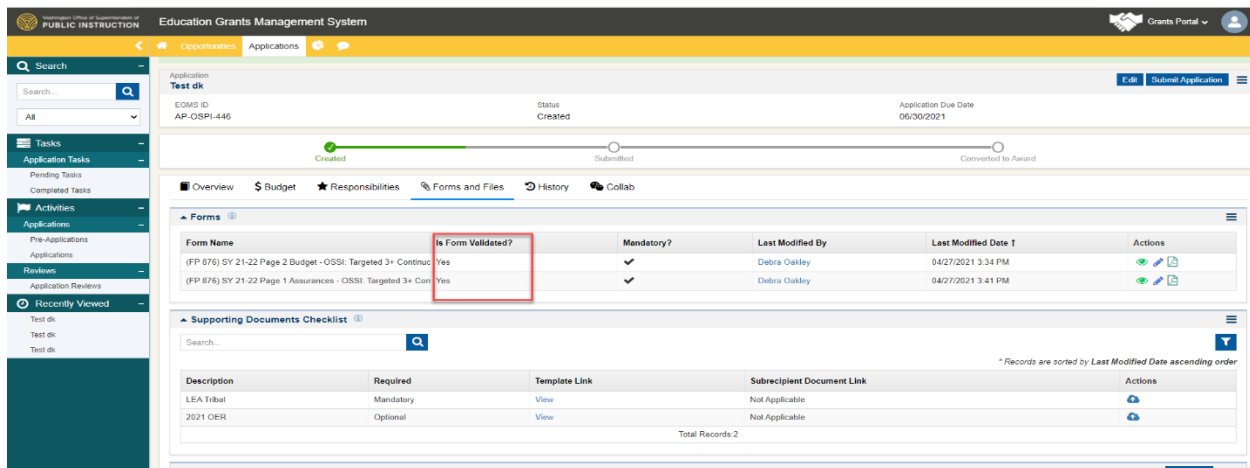
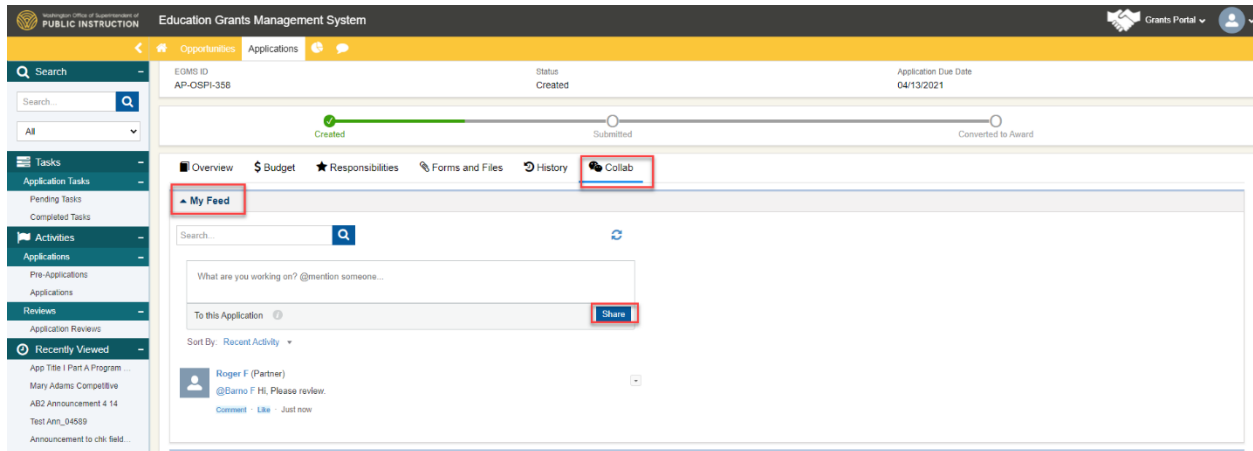


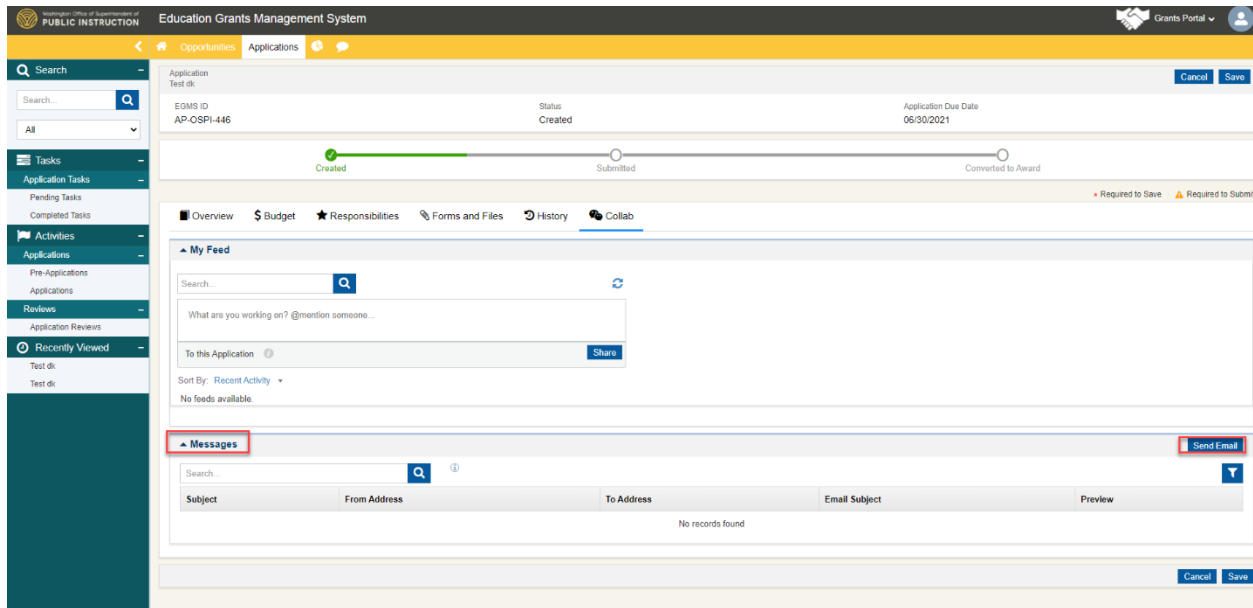
Figure 97: Is Form Validate

On the **Collab** tab, recipient user can share his feeds and send emails. To share the feeds, add the required details in **My Feed** section and click on the **Share** button.



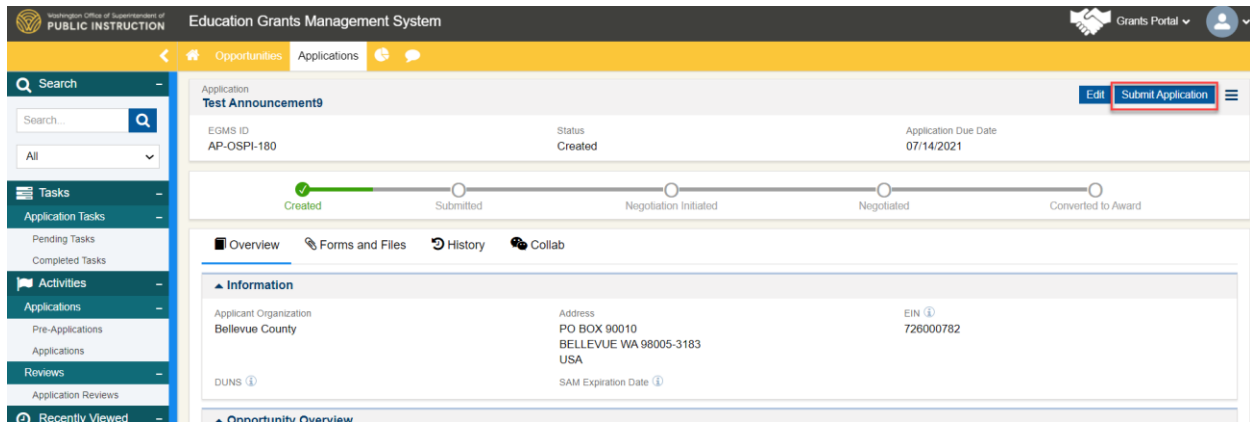
**Figure 98: Share My Feed**

To send the emails/message, navigate to **Messages** section. Click on the **Send Email** button to add the required details. Click **Send** button to send the message.



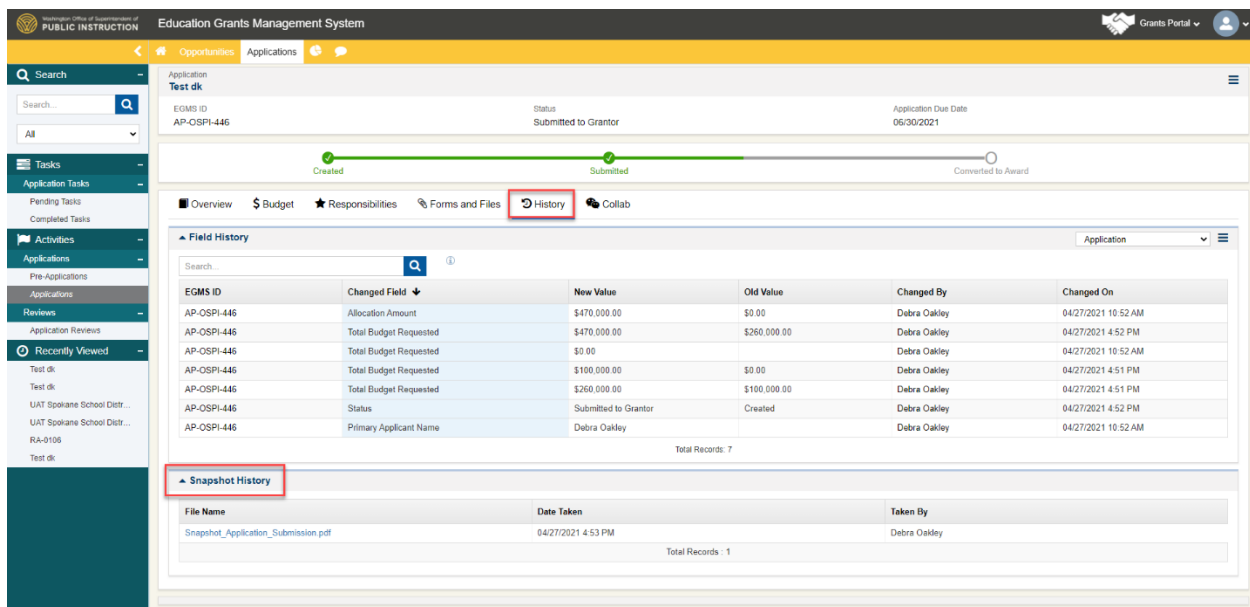
**Figure 99: Send Email**

After you have entered the required information and any additional information on hand, click on the **Submit Application** button. The application will now be submitted to the agency for review.




**Figure 100: Submit Application**

Navigate to the **History** tab. Once the application is submitted, the snapshot will be attached here.

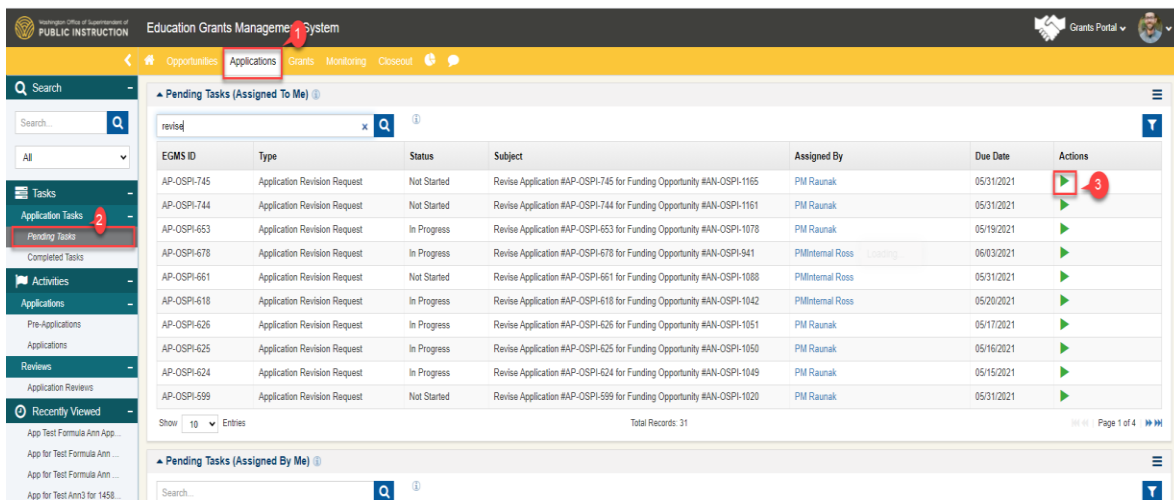


**Figure 101: Snapshot History**

### 9.2.3 COMPLETE APPLICATION REVISIONS

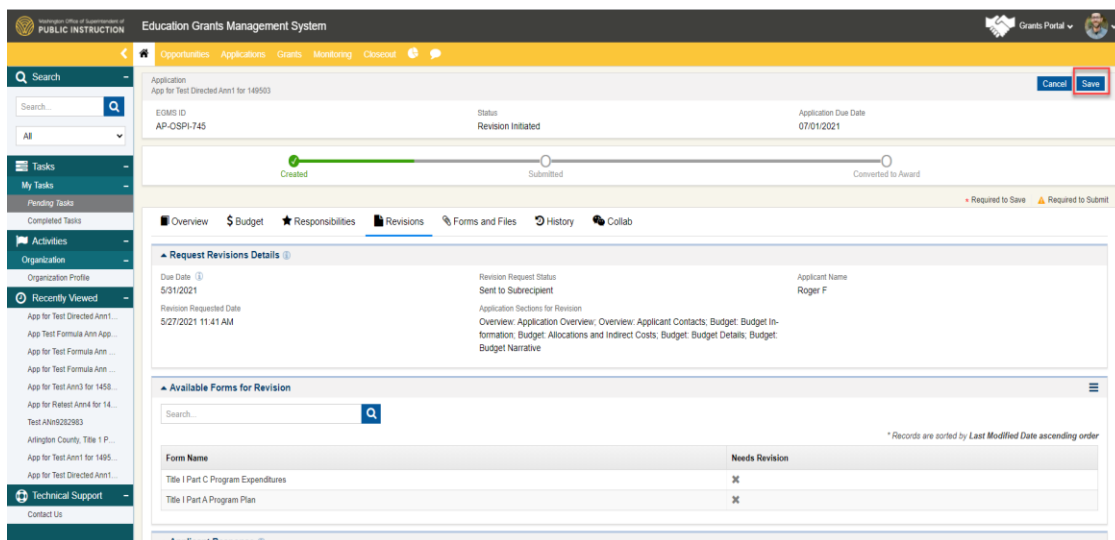
If there was an issue discovered in the application the Grantor can initiate a Revision. Navigate to your **Pending Tasks**. Locate the task to **Revise Application**. Click the **Action** icon (  ) to navigate to the Application.

**Note:** The applicant organization will only be able to revise sections of the application or forms related to the application which the internal OSPI staff has included as editable in the revision.

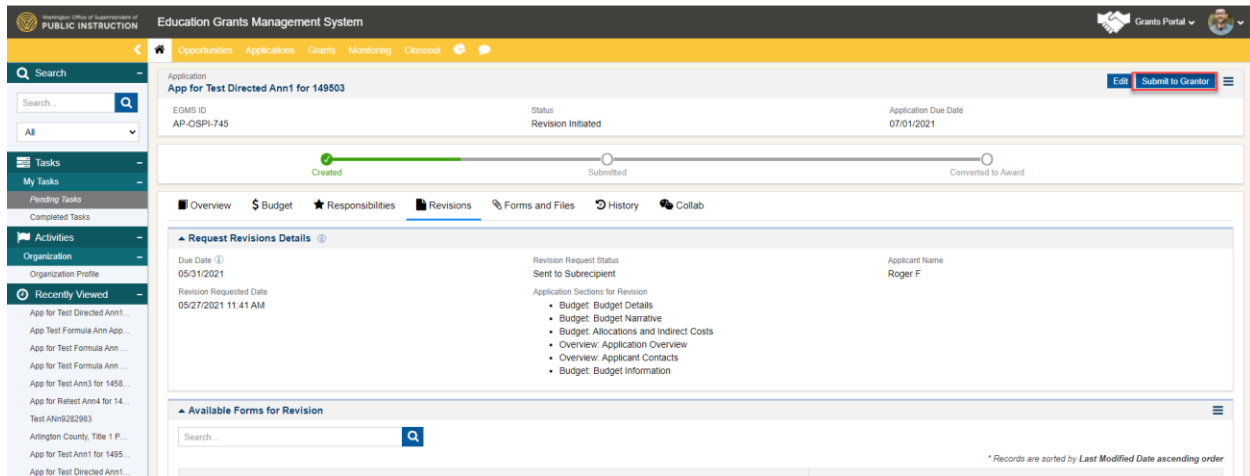


**Figure 102: Application Revision**

**Edit** any and all sections that are indicated in the Revisions tab. Once all revisions are completed, click on **Save**. Click on **Submit to Grantor**.



**Figure 103: Save Revision**



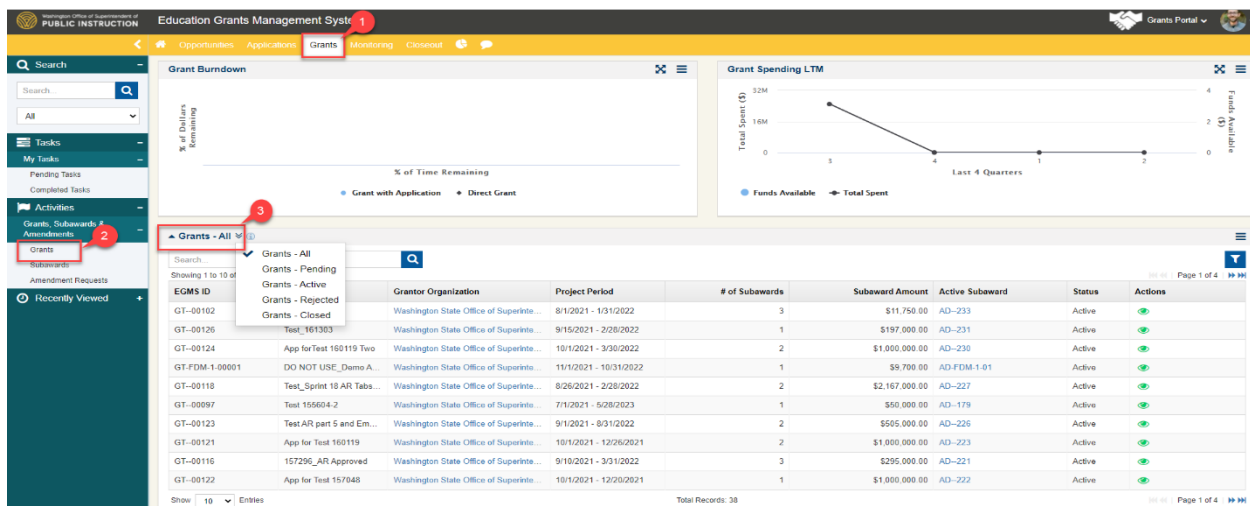
**Figure 104: Submit Revision to Grantor**

## 10 GRANTS

Grant is a financial assistance mechanism providing money, property, or both to an eligible entity to carry out an approved project or activity. The subaward includes grants and other agreements in the form of money or property in lieu of money, to an eligible recipient. In EGMS, Grant acts as a wrapper of one/many subawards.

### 10.1 VIEWING GRANTS AND AWARDS

Login to the EGMS Grants portal. Click on the **Grants** module and click the **Grants, Subawards & Amendments** in the left-hand navigation menu to view Active, Pending, Closed, Rejected and All.



**Figure 105: View Grants**

## 10.2 AMENDMENT REQUESTS

Amendment requests are changes made to an active award which may be of a monetary or non-monetary type.

### 10.2.1 TYPES OF AMENDMENT REQUEST

The Amendments Module enables internal OSPI users and LEA users to create and process a range of grant amendment types. These can be amendments initiated by the Grantor (OSPI) or initiated by the LEAs. For either type, details of the change are specified, and the record is internally approved. Once approved, a new award can be generated in the system reflecting the changes.

The types of amendment requests that a Recipient will encounter are:

- **Funding Change** allows the Grantor to request an addition/reduction of funds for a budget line item.
- **Budget Period Change** allows the Grantor to request an extension or reduction to the budget period end date.
- **Scope of Work Change** allows the District/Grantor to make changes to the scope of the project.
- **Periodic Renewal** will enable the Grantor to create the award for the subsequent Budget Period within an Award.
- **Budget Redirections** allows the District to redirect funds from one Budget Category to another Budget Category
- **Carry Overs** allows the Recipient to carry forward funds from the current Budget Period to the next for grants that have multiple Budget Periods.

A. Possible Amendment Types Of combinations are listed below:

|                  | Funding Change | Carry Overs    | Scope Change   | Budget Rev. | BP Change   | Periodic Renewal |
|------------------|----------------|----------------|----------------|-------------|-------------|------------------|
| Funding Change   | Allowed        | Allowed        | Allowed        | Not Allowed | Allowed     | Not Allowed      |
| Carry Overs      | Allowed        | Allowed        | <b>Allowed</b> | Not Allowed | Not Allowed | Allowed          |
| Scope Change     | Allowed        | <b>Allowed</b> | Allowed        | Allowed     | Allowed     | Not Allowed      |
| Budget Revisions | Not Allowed    | Not Allowed    | Allowed        | Allowed     | Not Allowed | Not Allowed      |
| BP Change        | Allowed        | Not Allowed    | Allowed        | Not Allowed | Allowed     | Not Allowed      |
| Periodic Renewal | Not Allowed    | Allowed        | Not Allowed    | Not Allowed | Not Allowed | Allowed          |

B. Amendment Requests that can initiated by OSPI and/or LEA are listed below:

| Amendment Type  | Can OSPI Initiate? | Can District/LEA Initiate? |
|---|--------------------|----------------------------|
| Funding Change  | Yes                | No                         |
| Carry Overs   | Yes                | No                         |
| Scope of Work Change  | Yes (Rare)         | Yes                        |
| Budget Revisions or Redirections (with or without transferability/REAP) | No                 | Yes                        |
| Performance Period Change   | Yes                | No                         |
| Periodic Renewal  | Yes                | No                         |

### 10.3 INITIATING AN AMENDMENT REQUEST

Login to the EGMS Grants portal. Click on the **Grants** module and click the **Grants** link under **Grants, Subawards & Amendments** in the left-hand navigation menu. On the Grants page, select the Active Grants option to view the **Grants-Active** table. Locate the Award and click on the **View** (👁️) icon under **Actions**.

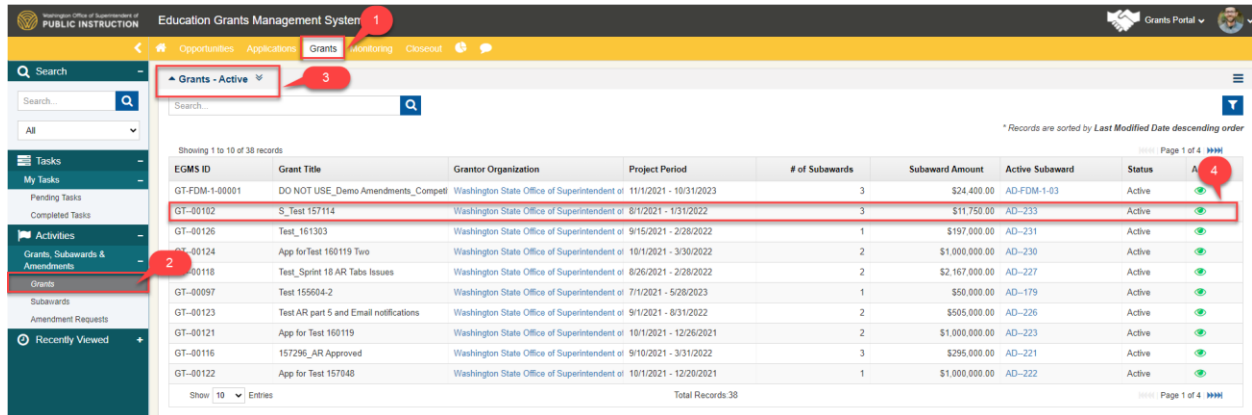
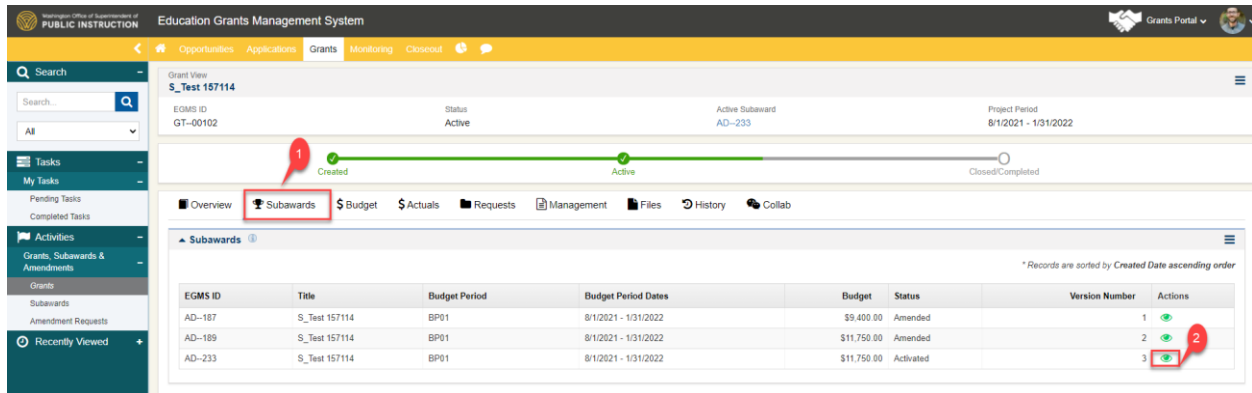


Figure 106: Accessing Active Grants

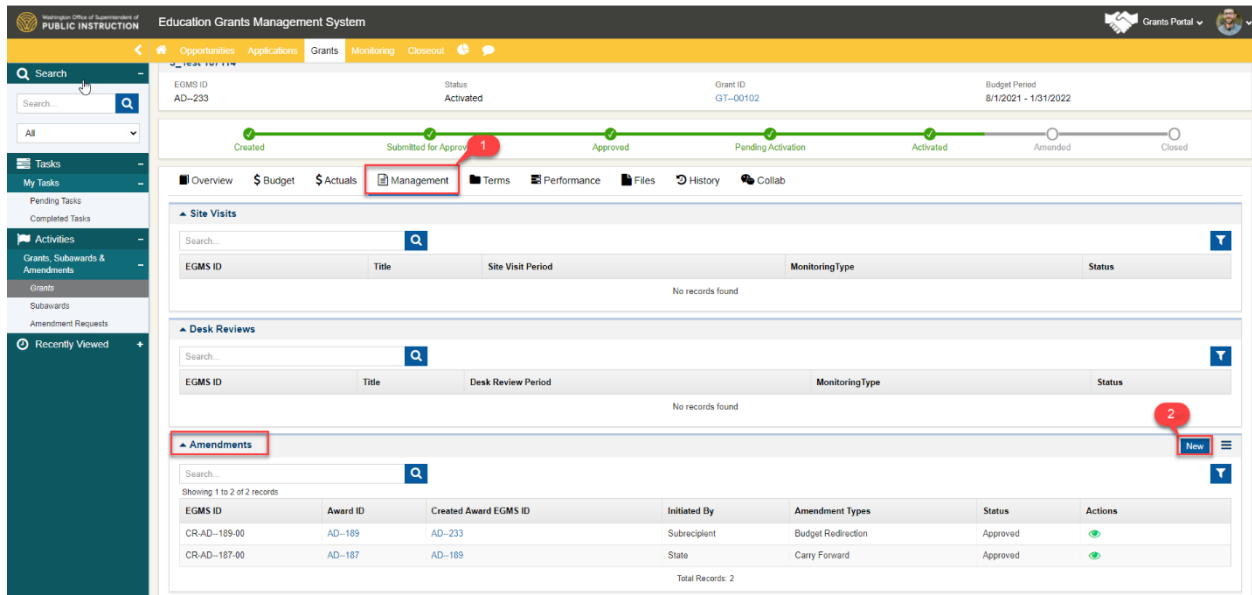
On the Grant page, navigate to the **Subawards** tab to view active subaward then click on the **View** (👁️) icon.





**Figure 107: Accessing Active Subaward**

On the Subaward page, navigate to the **Management** tab to create the Amendment Request. Navigate to the **Amendment** section and click on **New**.



**Figure 108: Creating an Amendment Request**

From this screen, select the type of change request. Add the details for overall justification and the impact it would have on the existing subaward. Once complete, click the **Save and Continue** button.

Figure 109: Select Amendment Request type

### 10.3.1.1 SCOPE OF WORK CHANGE REQUEST

District Users can make changes to the forms that were originally submitted as part of their initial Application. Scope of work can be initiated by Internal OSPI Users, as well LEAs. These changes can be made from the amendment record in the **Change in Scope** sections under the **Overview** Tab. Enter the additional information in this section and click on **Save** once complete. All required fields have either a red asterisk or an orange alert icon.

Figure 110: Overview tab

Navigate to **Forms** tab and complete the Applicant Response field. Click on **Forms** and choose the form(s) that you are requesting to be Edit, check **Request Amendment** and click on **Save**.

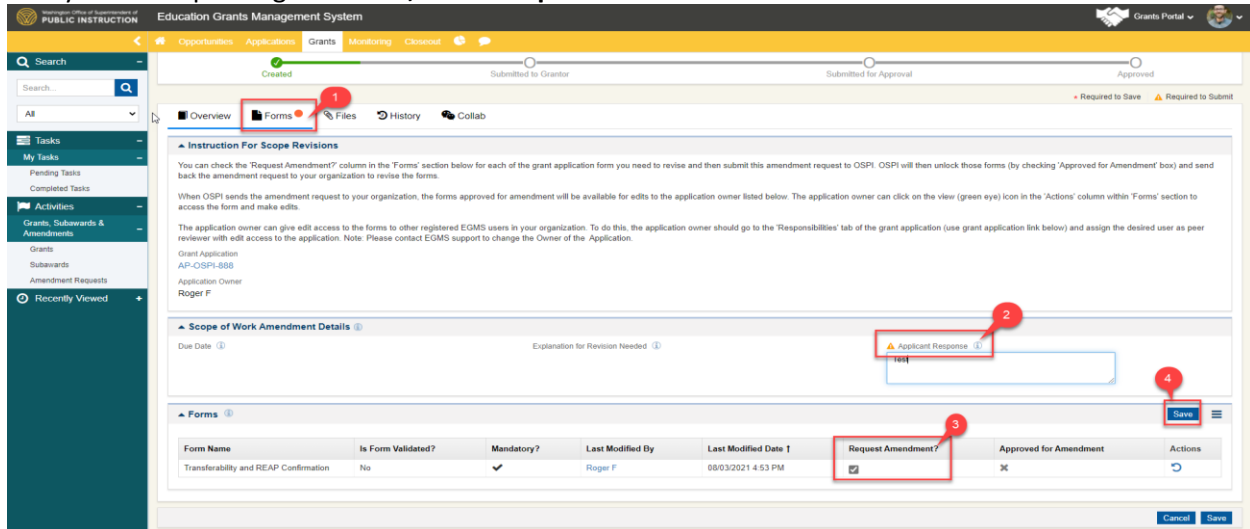


Figure 111: Creating a Scope of Work Amendment Request

Navigate to **Files** tab, to add attachment or notes, click on **Add** button in front of the section respectively.

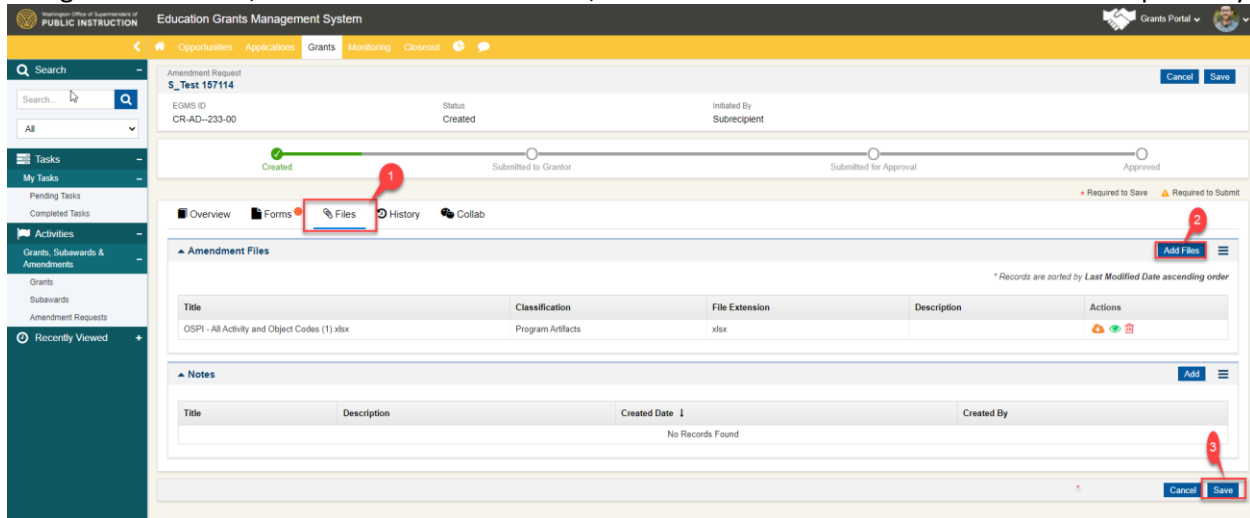


Figure 112: Add Attachments and Notes

Once Complete, click the **Save** button and then click on **Submit to the Grantor** button to submit the amendment request to grantor.

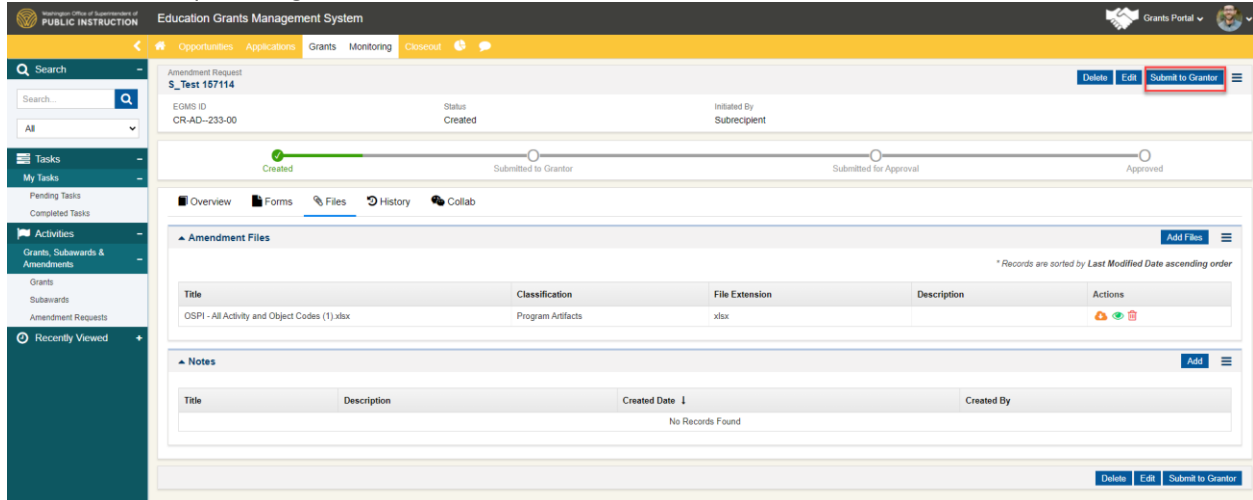


Figure 113: Submit to Grantor

Once you click on **Submit to Grantor** button the status will change to **Submitted to Grantor**.

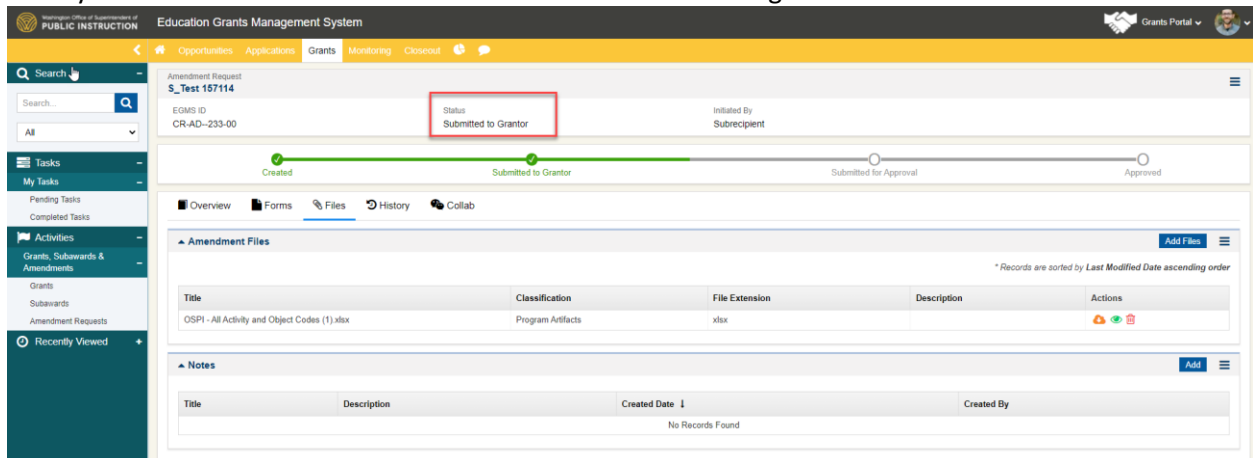


Figure 114: Submit Amendment Request to Grantor

### 10.3.1.2 BUDGET PERIOD CHANGE REQUEST

Budget period change request can be initiated only by Internal OSPI Users. District users cannot **Edit** the Budget Period Change, they can only **Acknowledge** and accept the new Budget Period Start Date and End Date.

Click on the **Acknowledge** button and the status will change to Acknowledged.

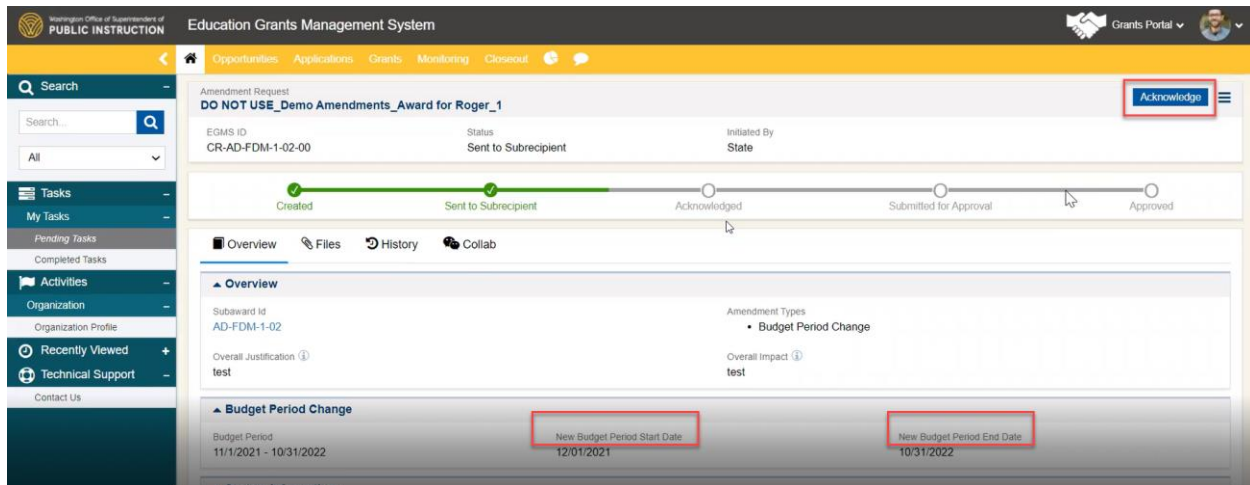


Figure 115: Acknowledging the Budget Period Change Request

### 10.3.1.3 BUDGET REDIRECTION CHANGE REQUEST

Under the **Overview** tab, enter the required details in Overall Justification, Overall Impact, and Justification for Budget Redirection fields in the **Overview** section.

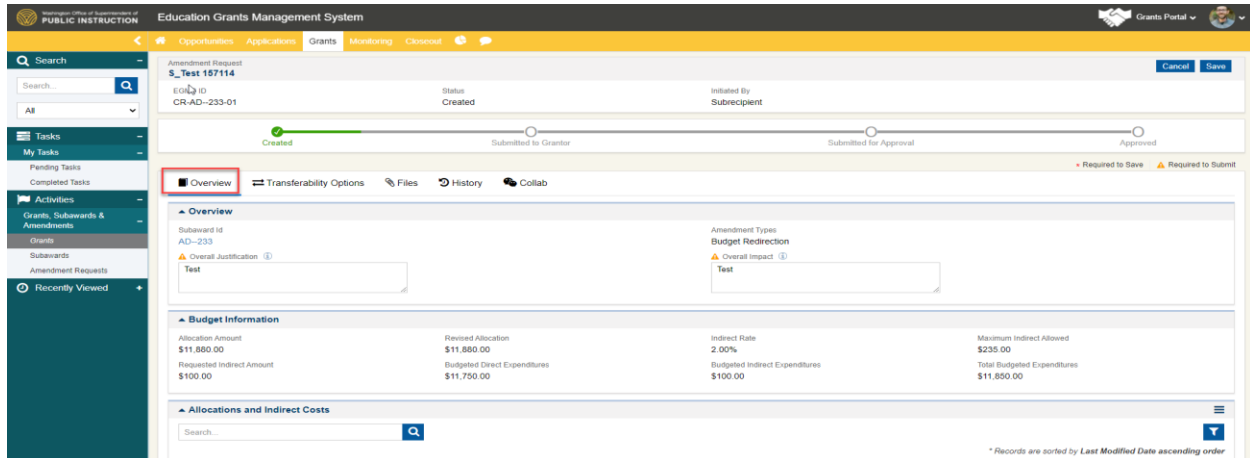


Figure 116: Creating a Change Request - Overview

Users can make changes to the **Budget Categories** grid under the **Budget Change** section. To make any budget change, click on the action icon beside the line item in which the awarded budget value requires edits. Enter the revised budget value in the fields and click on **Save** once done.

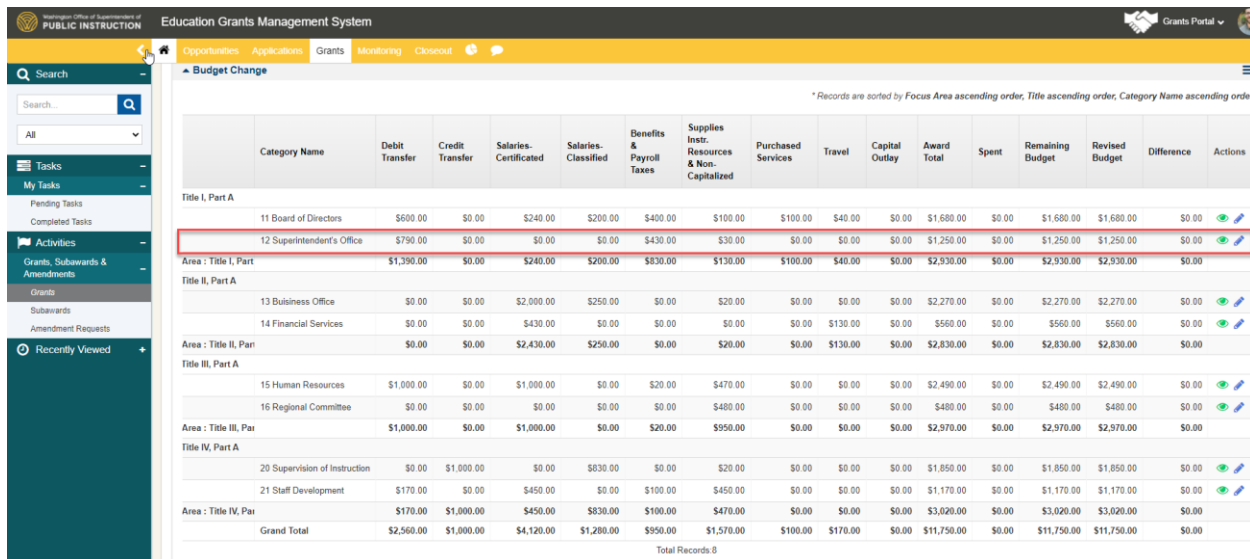
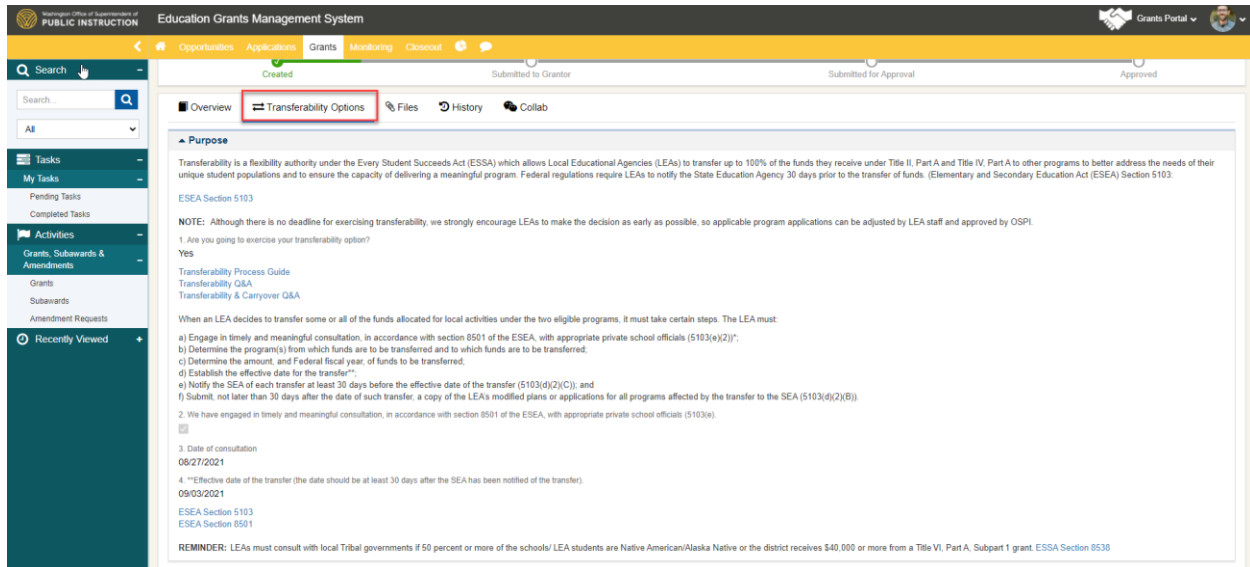


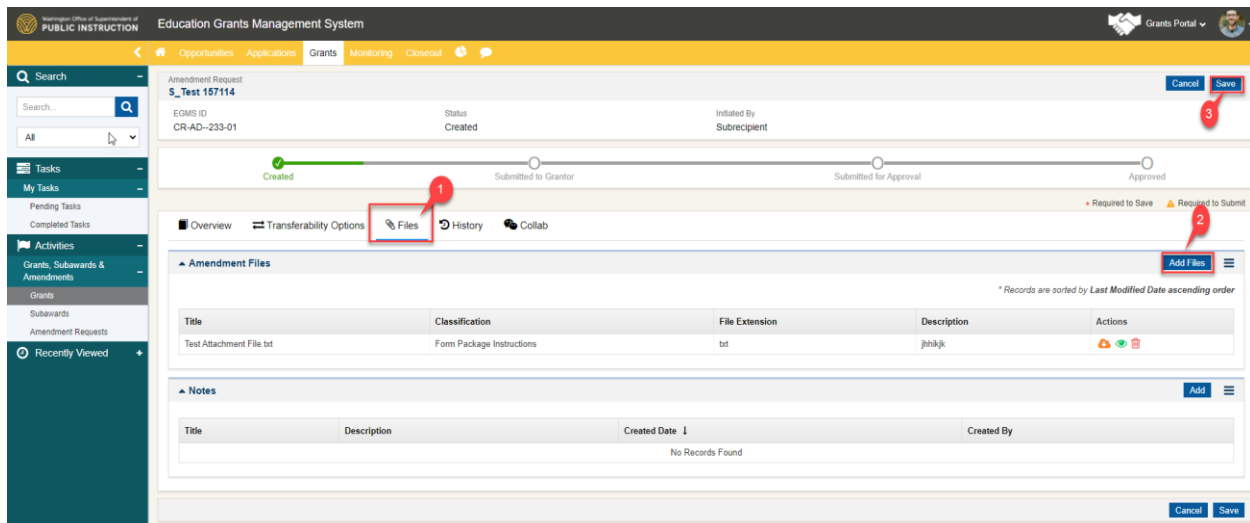
Figure 117: Creating a Change Request - Budget Change

Navigate to **Transferability Options** and complete the **Purpose** and **Transferability Details** section.



**Figure 118: Transferability Options**

Navigate to **Files** tab, to add attachment or notes, click on **Add** button in front of the section respectively and click **Save**.



**Figure 119: Add Attachments and Notes**

Once complete, click the **Save** button and then click on **Submit to the Grantor** button. The status will change to **Submitted to Grantor**.

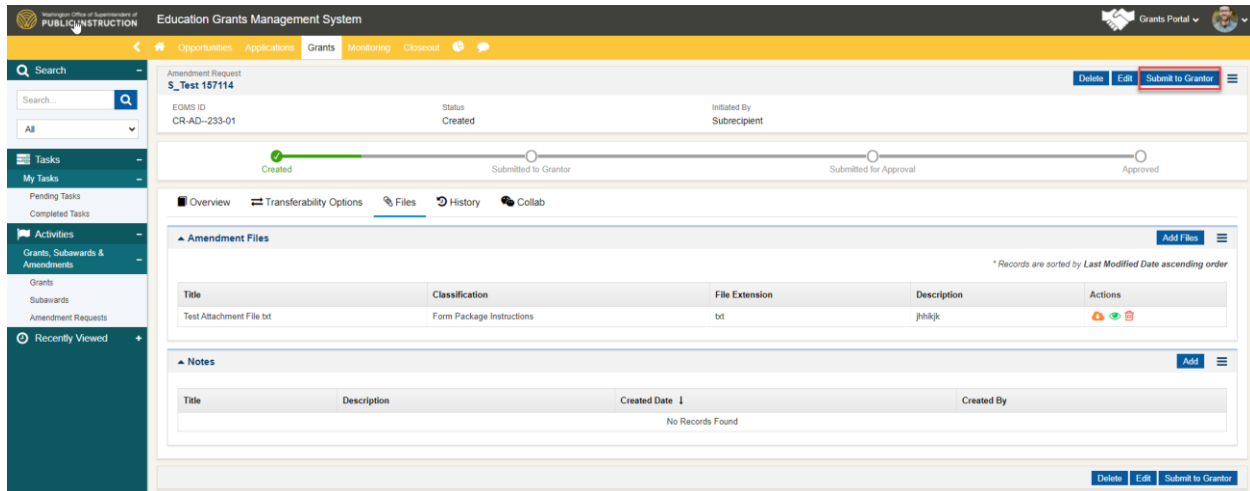


Figure 120: Submit Amendment Request to Grantor

### 10.3.1.4 CARRY FORWARD REQUEST

Carry Forward change request can be initiated only by Internal OSPI Users and sent to Subrecipient state. The Carry Forward change allows users to pull money from the previous subaward to the new subaward. The remaining amount from the previous subaward will be carried forward to the new subaward for the same parent grant

From the **Pending Tasks**, click on the **play icon** (▶) for the pending task that was created when the related amendment is sent to subrecipient users. The user will be navigated to the amendment request record.

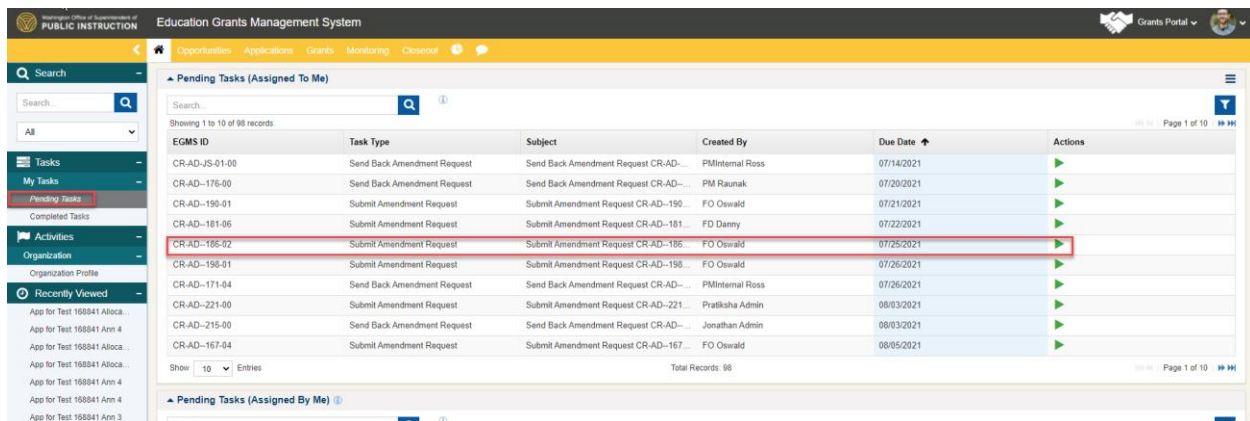


Figure 121: Pending task Play icon



From the amendment record, click on the **Overview** tab.

The screenshot shows the 'Education Grants Management System' interface. The 'Overview' tab is selected and highlighted with a red box. The main content area displays the amendment details, including the subaward ID (AD-234) and budget information. The 'Budget Information' section is expanded, showing a table of financial data.

| Budget Information             |                             |                              |                                |
|--------------------------------|-----------------------------|------------------------------|--------------------------------|
| Allocation Amount              | Available for Carryover     | Revised Allocation           | Indirect Rate                  |
| \$58,000.00                    | \$0.00                      | \$58,000.00                  | 5.00%                          |
| Maximum Indirect Allowed       | Requested Indirect Amount   | Budgeted Direct Expenditures | Budgeted Indirect Expenditures |
| \$2,764.00                     | \$1,207.00                  | \$56,793.00                  | \$1,084.00                     |
| Budgeted Indirect Expenditures | Total Budgeted Expenditures |                              |                                |
| \$1,207.00                     | \$58,000.00                 |                              |                                |

**Figure 122: Overview tab**

For an award without Allocations by Focus Area on the Announcement, you can or add/reduce dollar amount from the **Requested Indirect Amount** field on the Budget Information section.

This close-up view of the 'Budget Information' section shows the 'Requested Indirect Amount' field highlighted with a red box. The value is \$1,207.00. Other fields include Allocation Amount (\$58,000.00), Available for Carryover (\$0.00), Revised Allocation (\$58,000.00), Indirect Rate (5.00%), Maximum Indirect Allowed (\$2,764.00), Budgeted Direct Expenditures (\$56,793.00), and Budgeted Indirect Expenditures (\$1,084.00).

**Figure 123: Requested Indirect Amount**

For an award **with** Allocations **by Focus Area** on the Announcement, you can add/reduce dollar amount from the **Requested Indirect Amount** field on the Allocations and Indirect Cost section.

The screenshot shows the 'Allocations and Indirect Costs' section. A table lists various focus areas and programs with their respective financial values. The 'Requested Indirect Amount' column is highlighted with a red box, showing a total of \$1,207.00. The table also includes columns for Allocation Amount, Available for Carryover, Revised Allocation, Maximum Indirect Allowed, Indirect Expenditures Approved, Allowed Budgeted Direct Expenditure, and Budgeted Direct Expenditure.

| Focus Area/Program | Allocation Amount  | Available for Carryover | Revised Allocation | Maximum Indirect Allowed | Indirect Expenditures Approved | Requested Indirect Amount | Allowed Budgeted Direct Expenditure | Budgeted Direct Expenditure | Actions |
|--------------------|--------------------|-------------------------|--------------------|--------------------------|--------------------------------|---------------------------|-------------------------------------|-----------------------------|---------|
| Title I, Part C    | \$15,000.00        | \$0.00                  | \$15,000.00        | \$715.00                 |                                | \$315.00                  | \$14,685.00                         | \$14,685.00                 |         |
| Title I, Part A    | \$12,000.00        | \$0.00                  | \$12,000.00        | \$572.00                 |                                | \$300.00                  | \$11,700.00                         | \$11,700.00                 |         |
| Title IV, Part A   | \$23,000.00        | \$0.00                  | \$23,000.00        | \$1,096.00               |                                | \$315.00                  | \$22,685.00                         | \$22,685.00                 |         |
| Title II, Part A   | \$8,000.00         | \$0.00                  | \$8,000.00         | \$381.00                 |                                | \$277.00                  | \$7,723.00                          | \$7,723.00                  |         |
| <b>Total</b>       | <b>\$58,000.00</b> | <b>\$0.00</b>           | <b>\$58,000.00</b> | <b>\$2,764.00</b>        |                                | <b>\$1,207.00</b>         | <b>\$56,793.00</b>                  | <b>\$56,793.00</b>          |         |

**Figure 124: Allocation and Indirect Costs**

Scroll down to the **Budget Change** section to make changes to the existing Budget and match the Budget with the updated allocations. If there is **Transfer Carryover** and **Program Carryover** tabs available, please complete the transfers before making changes to the Budget in the Overview tab.

**Budget Change**

Showing 1 to 10 of 52 records

\* Records are sorted by Focus Area ascending order, Title ascending order, Category Name ascending order

| EGMS ID                            | Category Name              | Debit Transfer | Credit Transfer | Salaries-Certificated | Salaries-Classified | Benefits & Payroll Taxes | Supplies Inst. Resources & Non-Capitalized | Purchased Services | Travel     | Capital Outlay | Award Total | Spent  | Remaining Budget | Revised Budget | Difference | Actions |
|------------------------------------|----------------------------|----------------|-----------------|-----------------------|---------------------|--------------------------|--|--------------------|------------|----------------|-------------|--------|------------------|----------------|------------|---------|
| Focus Area : Title I, Part A       |                            |                |                 |                       |                     |                          |  |                    |            |                |             |        |                  |                |            |         |
| AC-2927                            | 11 Board of Directors      | \$1,000.00     | \$100.00        | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$1,777.00     | \$2,877.00  | \$0.00 | \$2,877.00       | \$2,877.00     | \$0.00     |         |
| AC-2928                            | 12 Superintendent's Office | \$5,000.00     | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$5,000.00  | \$0.00 | \$5,000.00       | \$5,000.00     | \$0.00     |         |
| AC-2929                            | 13 Business Office         | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$0.00      | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| AC-2930                            | 14 Financial Services      | \$0.00         | \$3,000.00      | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$3,000.00  | \$0.00 | \$3,000.00       | \$3,000.00     | \$0.00     |         |
| AC-2931                            | 15 Human Resources         | \$823.00       | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$823.00    | \$0.00 | \$823.00         | \$823.00       | \$0.00     |         |
| AC-2932                            | 16 Regional Committee      | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$0.00      | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| AC-2920                            | 17 Public Information      | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$0.00      | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| AC-2921                            | 23 Certification           | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$0.00      | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| AC-2922                            | 26 Health/Related Services | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$0.00      | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| AC-2923                            | 27 Direct Instruction      | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$0.00         | \$0.00      | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| Total - Focus Area : Title I, Part |                            | \$6,823.00     | \$3,100.00      | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00     | \$1,777.00     | \$11,700.00 | \$0.00 | \$11,700.00      | \$11,700.00    | \$0.00     |         |
| Grand Total                        |                            | \$26,693.00    | \$5,100.00      | \$5,723.00            | \$1,000.00          | \$4,500.00               | \$1,000.00                                 | \$1,000.00         | \$1,000.00 | \$10,777.00    | \$56,793.00 | \$0.00 | \$56,793.00      | \$56,793.00    | \$0.00     |         |

Show 10 Entries Total Records 52

Figure 125: Budget change

For an award **with** Allocations by **Focus Area** on the Announcement, navigate to the **Transfer Carryover** tab and complete all the required details.

**Overview** **Transfer Carryover** Program Carryover Files History Collab

Federal Transferability Under Every Student Succeeds Act (ESSA) - transferred funds take on the character of the program they are transferred into. This includes statutory set-asides and carryover. Any remaining balance of the total amount after transfers is used to calculate the carryover balances and limitations.

Carryover balances remain with the program transferred into unless the LEA elects to transfer them. They do not "automatically follow" current year transfer elections. LEAs who want to transfer available carryover funds must notify OSPI on this form.

▼ Carryover Balance and Elect to Transfer

▼ Section A – Carryover Balances

▲ Section B - Transfer Carryover Funds **Add**

Select the carryover funds you wish to transfer. Refer to **Section A** for available carryover balances

| Transfer From ↑  | Transfer To | Transfer Amount |
|------------------|-------------|-----------------|
| No Records Found |             |                 |

Use of Transferred Carryover Funds

Figure 126: Transfer Carryover

In the Transfer Carryover tab, scroll down to the **Section B – Transfer Carryover Funds** section and click on **Add** button. Enter a **Transfer From**, **Transfer To** focus areas and **Transfer Amount**.

Education Grants Management System

Grants Portal

Section A - Carryover Balances

- TRANSFERS OUT have been subtracted from the total allocation used to calculate carryover limitation (only applies to Title II, A and Title IV, A).
- TRANSFERS IN have been added to the total allocation used to calculate carryover limitation.

For further examples and explanation, please see [Transferability Q&A](#) and [Transferability and Carryover Q&A](#)

\* Records are sorted by Last Modified Date ascending order

| Program          | (A) Adjusted by prior year transfers | (B) Amount of carryover available |
|------------------|--------------------------------------|-----------------------------------|
| Title IV, Part A | Yes                                  | \$0.00                            |
| Title II, Part A | Yes                                  | \$0.00                            |

Section B - Transfer Carryover Funds

Select the carryover funds you wish to transfer. Refer to Section A for available carryover balances

| Transfer From    | Transfer To      | Transfer Amount | Actions |
|------------------|------------------|-----------------|---------|
| Title IV, Part A | Title II, Part A | 15,000          | ✖       |

No Records Found

Use of Transferred Carryover Funds

Describe how the transferred carryover funds (as indicated above) will be used to meet the objectives of the receiving program.

Certifications

The LEA understands that transferred funds are subject to the program and fiscal requirements of the receiving program. This includes statutory set-asides and carryover limitations.

The LEA certifies it understands its responsibility to internally track transferred funds, including carryover funds.

Figure 127: Section B Transfer Carryover Funds

Complete the Use of **Transferred Carryover Funds** details and **Certification** section and Click on **Save**.

Education Grants Management System

Grants Portal

Section A - Carryover Balances

- TRANSFERS OUT have been subtracted from the total allocation used to calculate carryover limitation (only applies to Title II, A and Title IV, A).
- TRANSFERS IN have been added to the total allocation used to calculate carryover limitation.

For further examples and explanation, please see [Transferability Q&A](#) and [Transferability and Carryover Q&A](#)

\* Records are sorted by Last Modified Date ascending order

| Program          | (A) Adjusted by prior year transfers | (B) Amount of carryover available |
|------------------|--------------------------------------|-----------------------------------|
| Title IV, Part A | Yes                                  | \$0.00                            |
| Title II, Part A | Yes                                  | \$0.00                            |

Section B - Transfer Carryover Funds

Select the carryover funds you wish to transfer. Refer to Section A for available carryover balances

| Transfer From    | Transfer To | Transfer Amount | Actions |
|------------------|-------------|-----------------|---------|
| No Records Found |             |                 |         |

Use of Transferred Carryover Funds

Describe how the transferred carryover funds (as indicated above) will be used to meet the objectives of the receiving program.

test

Certifications

The LEA understands that transferred funds are subject to the program and fiscal requirements of the receiving program. This includes statutory set-asides and carryover limitations.

The LEA certifies it understands its responsibility to internally track transferred funds, including carryover funds.

Figure 128: Use of Transferred Carryovers Funds and Certifications

For an award with **Allocations by Focus Area** on the Announcement, navigate to the **Program Carryover** tab and complete all the required details.

The screenshot displays the Education Grants Management System (EGMS) interface. At the top, the navigation bar includes 'Opportunities', 'Applications', 'Grants', 'Monitoring', and 'Closeout'. The 'Grants' tab is active, showing an 'Amendment Request' for 'DO NOT USE\_Demo Amendments\_Formula'. The status is 'Sent to Subrecipient'. A progress bar below the status shows stages: 'Created', 'Sent to Subrecipient', 'Submitted to Grantor', 'Submitted for Approval', and 'Approved'. The 'Program Carryover' tab is highlighted with a red box. Below the navigation bar, there is a section titled 'Title I, Part A Program Carryover Details' with a table of values:

| Title I, Part A Program Carryover Details  |             |
|--|-------------|
| 1. Current Year Original Allocation  | \$10,000.00 |
| 2. Current Year Revised Allocation (including increase or reduction if applicable) | \$12,000.00 |
| 3. Previous Year Total Unspent Title I, Part A Funds                               |             |
| 4. Carryover Amount (Not including excess)   |             |
| 5. Carryover Amount (including excess if applicable)                               | \$1,000.00  |
| 6. Carryover Waiver Eligibility Status   | Eligible    |

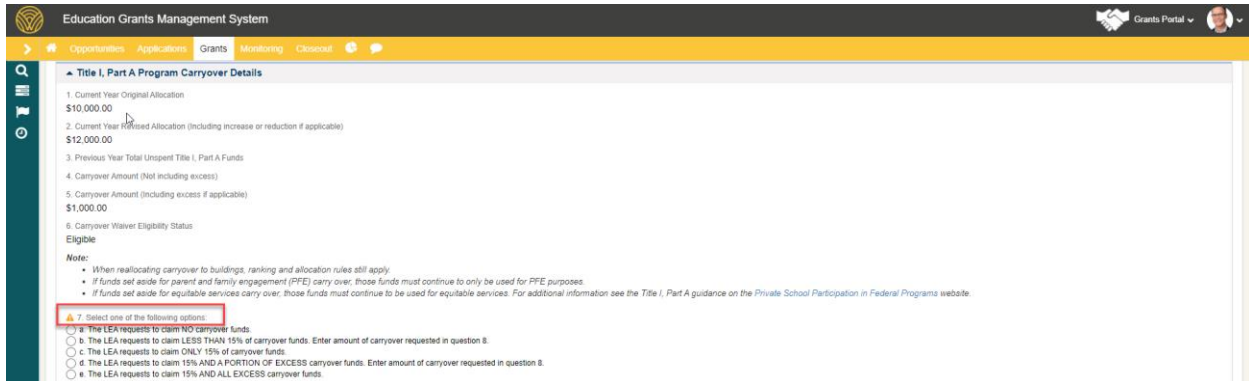
Below the table, there is a 'Note' section with bullet points: 'When reallocating carryover to buildings, ranking and allocation rules still apply', 'If funds set aside for parent and family engagement (PFE) carry over, those funds must continue to only be used for PFE purposes.', and 'If funds set aside for equitable services carry over, those funds must continue to be used for equitable services. For additional information see the Title I, Part A guidance on the Private School Participation in Federal Programs website.'

Figure 129: Program Carryover

Note:

- For Awards that have Allocations by Focus Area on the Announcement, Revised Allocation is equal to the sum of 'Allocation Amount', 'Available for Carryover' and Net Carryover Transfer Amounts from the 'Transfer Carryover' tab.
- For Awards that have Allocations by Focus Area on the Announcement, Revised Allocation for Title I, Part A is equal to the sum of 'Allocation Amount', Question 9 is the 'Program Carryover' tab and Net Carryover Transfer Amounts from the 'Transfer Carryover' tab.
- For Awards that **do not** have Allocations by Focus Area on the Announcement, 'Revised Allocation' is equal to the sum of 'Allocation Amount' and 'Available for Carryover' fields.

In the Title I, Part A Program Carryover Details section, select an option for question 7.



**Figure 130: Title I, Part A Program Carryover Details**

Depending on the radio button selected, the system will populate question 9 in **Carryover Amount for Title I, Part A Budget Revision** section and add that carryover amount to the **Revised Allocation** for Title I, Part A in the Overview tab.

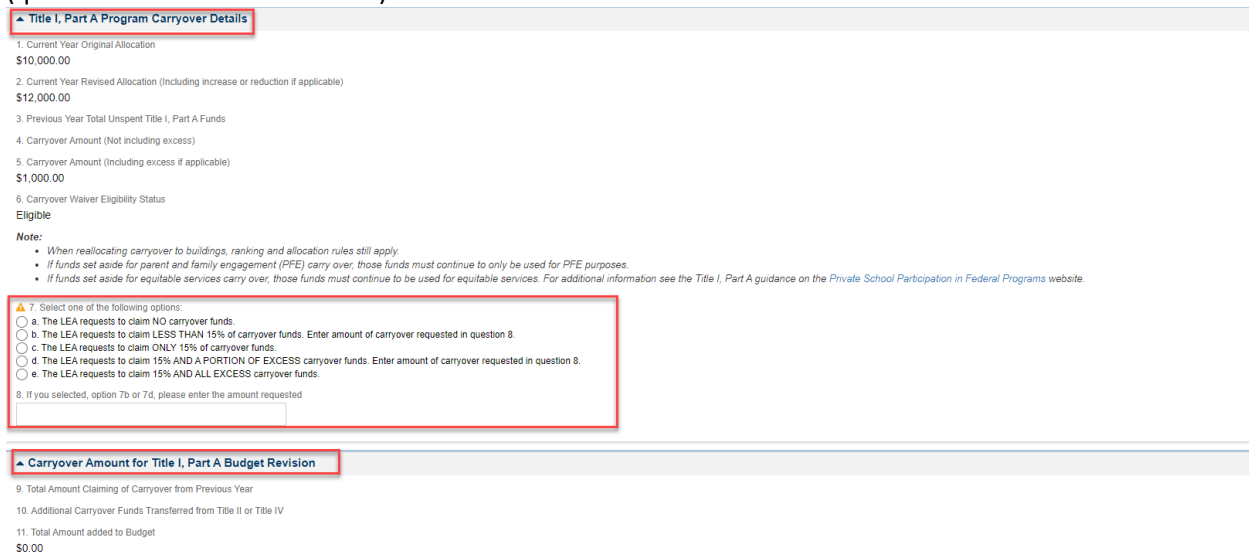
**For option a** – the system will not add any carryover amount

**For option b** – the system will add the amount specified in question 8

**Option c** - the system will add the amount specified in the overview tab, **Available for carryover** for Title I, Part A

**Option d** - the system will add the amount specified in question 8

**Option e** – the system will add amount from the Carryover Amount (Including excess if applicable) field (question 5 in the same section)



**Figure 131: Carryover Amount**

Complete the required fields under the Carryover Explanations for Other Programs and Authorized Signature and click on **Save**.

Education Grants Management System

Opportunities Applications Grants Monitoring Closeout

10. Additional Carryover Funds Transferred from Title II or Title IV  
11. Total Amount added to Budget  
\$0.00

**Carryover Explanations for Other Programs**

1. Please explain why the LEA did not expend all the federal funds from the previous year for Title I, Part A?

2. Provide an explanation for how the LEA will use the carryover funds for Title I, Part A.

3. Please explain why the LEA did not expend all the federal funds from the previous year for Title II, Part A?

4. Provide an explanation for how the LEA will use the carryover funds for Title II, Part A.

5. Please explain why the LEA did not expend all the federal funds from the previous year for Title IV, Part A?

6. Provide an explanation for how the LEA will use the carryover funds for Title IV, Part A.

**Authorized Signature**

Authorized Representative Name

Authorized Representative Title

Date

Figure 132: Authorized Signature

Amendment Request

**DO NOT USE\_Demo Amendments\_Formula**

Cancel Save

EDMS ID: CR-AD-234-02

Status: Sent to Subrecipient

Initiated By: State

Created Sent to Subrecipient Submitted to Grantor Submitted for Approval Approved

Required to Save Required to Submit

Overview Transfer Carryover Program Carryover Files History Collab

For LEAs with an allocation of \$50,000 or more, section 1127 of the Elementary and Secondary Education Act (as amended by ESSA) permits a maximum 15 percent carryover of the Title I, Part A final allocation from one year to the next. For LEAs with an allocation of less than \$50,000, there is no restriction to the maximum amount of available carryover funds.

For carryover guidance, review the Allocating Program Funds section on the Fiscal Requirements and Guidance page of our website.

An additional calculation is incorporated into the carryover process. A revision to the LEA's allocation as calculated by the U.S. Department of Education (ED) each year. The revision includes adjustments for updated student counts, as well as any change to the Title I, Part A state grant. If applicable, this change is shown in the table below. Allocations below include funds transferred into Title I, Part A.

Figure 133: Save the data

After making the necessary updates, click on **Submit to Grantor** button. The request will be sent to the grantor, and the status will change to **Submitted to Grantor**.

Amendment Request  
**App for Test 157154** Edit Submit to Grantor

EGMS ID: CR-AD-197-00      Status: Sent to Subrecipient      Initiated By: State

Created      Sent to Subrecipient      Submitted to Grantor      Submitted for Approval      Approved

Overview      **Transferability Options**      Files      History      Collab

**Purpose**

Transferability is a flexibility authority under the Every Student Succeeds Act (ESSA) which allows Local Educational Agencies (LEAs) to transfer up to 100% of the funds they receive under Title II, Part A and Title IV, Part A to other programs to better address the needs of their unique student populations and to ensure the capacity of delivering a meaningful program. Federal regulations require LEAs to notify the State Education Agency 30 days prior to the transfer of funds. (Elementary and Secondary Education Act (ESEA) Section 5103.

[ESEA Section 5103](#)

**NOTE:** Although there is no deadline for exercising transferability, we strongly encourage LEAs to make the decision as early as possible, so applicable program applications can be adjusted by LEA staff and approved by OSPI.

1. Are you going to exercise your transferability option?  
Yes

[Transferability Process Guide](#)  
[Transferability Q&A](#)  
[Transferability & Carryover Q&A](#)

When an LEA decides to transfer some or all of the funds allocated for local activities under the two eligible programs, it must take certain steps. The LEA must:

**Figure 134: Submit to Grantor**

### 10.3.1.5 PERIODIC RENEWAL REQUEST

The Grantor users will create the **Periodic Renewal** amendment request and send it to the subrecipient. Login to the **EGMS** recipient portal. Under Grants phase, click on Pending Tasks link under **My Tasks** in the left navigation panel.

In the **Pending Tasks (Assigned To Me)** table, click on the play icon to start the process for the related award periodic renewal amendment request.

Washington Office of Superintendent of PUBLIC INSTRUCTION      Education Grants Management System      Grants Portal

Opportunities      Applications      **Grants**      Monitoring      Closeout

Search

Showing 1 to 4 of 4 records

| EGMS ID      | Type                     | Status      | Subject                                     | Assigned By | Due Date   | Actions |
|--------------|--------------------------|-------------|---|-------------|------------|---------|
| PR-213       | Create Payment Request   | Not Started | Create Payment Request for Subaward #AD-168 | QA-Admin    | 09/23/2021 | ▶       |
| CR-AD-299-00 | Submit Amendment Request | Not Started | Submit Amendment Request CR-AD-299-00       | FD Danny    | 09/20/2021 | ▶       |
| CR-AD-234-02 | Submit Amendment Request | Not Started | Submit Amendment Request CR-AD-234-02       | FD Danny    | 08/12/2021 | ▶       |
| CR-AD-168-01 | Submit Amendment Request | Not Started | Submit Amendment Request CR-AD-168-01       | FD Danny    | 07/14/2021 | ▶       |

Total Records: 4

**Figure 735: Periodic Renewal Request**

From the amendment record, click on the **Overview** tab and you can add/update the new Indirect amount.

**Education Grants Management System**

Amendment Request: **Test\_OSPI Record Owner\_166652**

EGMS ID: CR-AD-188-03 | Status: Sent to Subrecipient | Initiated By: State

**Budget Information**

|                             |                           |                              |                                |
|-----------------------------|---------------------------|------------------------------|--------------------------------|
| Allocation Amount           | Revised Allocation        | Subrecipient Match (%)       | Indirect Rate                  |
| \$800,000.00                | \$800,000.00              | 10.00%                       | 10.00%                         |
| Maximum Indirect Allowed    | Requested Indirect Amount | Budgeted Direct Expenditures | Budgeted Indirect Expenditures |
| \$72,728.00                 | 1000000                   | \$800,000.00                 | \$0.00                         |
| Total Budgeted Expenditures |                           |                              |                                |
| \$800,000.00                |                           |                              |                                |

**Figure 836: Add/Update Requested Indirect Amount**

Scroll down to the Budget Change and click on the pencil (✎) icon to complete the new Budget that has been set up during the amendment request.

**Education Grants Management System**

**Budget Period Details**

Project Period: 8/20/2021 - 2/28/2022 | Previous Budget Period: 8/20/2021 - 2/28/2022

Proposed Budget Period Start Date: 3/1/2022 | Proposed Budget Period End Date: 11/15/2022

**Budget Change**

\* Records are sorted by Focus Area ascending order, Title ascending order, Category Name ascending order

| EGMS ID                                    | Category Name                  | Award Total  | Spent  | Remaining Budget | Revised Budget | Difference | Cash Match  | Non Cash Match | Total Match | Total Project Cost | Actions |
|--|--------------------------------|--------------|--------|------------------|----------------|------------|-------------|----------------|-------------|--------------------|---------|
| Focus Area : Test_OSPI Record Owner_166652 |                                |              |        |                  |                |            |             |                |             |                    |         |
| AC-2474                                    | 11 Site Purchases              | \$140,000.00 | \$0.00 | \$140,000.00     | \$140,000.00   | \$0.00     | \$25,000.00 | \$0.00         | \$25,000.00 | \$165,000.00       | ✎       |
| AC-2477                                    | 22 Building Remodeling         | \$150,000.00 | \$0.00 | \$150,000.00     | \$150,000.00   | \$0.00     | \$15,000.00 | \$15,000.00    | \$30,000.00 | \$180,000.00       | ✎       |
| AC-2478                                    | 31 Initial Equipment           | \$130,000.00 | \$0.00 | \$130,000.00     | \$130,000.00   | \$0.00     | \$5,000.00  | \$0.00         | \$5,000.00  | \$135,000.00       | ✎       |
| AC-2475                                    | 41 Energy Audits               | \$200,000.00 | \$0.00 | \$200,000.00     | \$200,000.00   | \$0.00     | \$10,000.00 | \$0.00         | \$10,000.00 | \$210,000.00       | ✎       |
| AC-2476                                    | 42 Energy-Capital Improvements | \$180,000.00 | \$0.00 | \$180,000.00     | \$180,000.00   | \$0.00     | \$0.00      | \$10,000.00    | \$10,000.00 | \$190,000.00       | ✎       |
| Total - Focus Area : Test_OSPI R           |                                | \$800,000.00 | \$0.00 | \$800,000.00     | \$800,000.00   | \$0.00     | \$55,000.00 | \$25,000.00    | \$80,000.00 | \$880,000.00       |         |
| Grand Total                                |                                | \$800,000.00 | \$0.00 | \$800,000.00     | \$800,000.00   | \$0.00     | \$55,000.00 | \$25,000.00    | \$80,000.00 | \$880,000.00       |         |

Total Records: 5

**Figure 937: Budget Change update**

Once all required details are provided, click the **Save** button. On completion, click **Submit to Grantor** Button. The status will change to **Submitted to Grantor**.



| Allocation Amount           | Revised Allocation        | Subrecipient Match (%)       | Indirect Rate                  |
|-----------------------------|---------------------------|------------------------------|--------------------------------|
| \$800,000.00                | \$800,000.00              | 10.00%                       | 10.00%                         |
| Maximum Indirect Allowed    | Requested Indirect Amount | Budgeted Direct Expenditures | Budgeted Indirect Expenditures |
| \$72,728.00                 | 1,000,000.00              | \$800,000.00                 | \$1,000,000.00                 |
| Total Budgeted Expenditures |                           |                              |                                |
| \$1,800,000.00              |                           |                              |                                |

**Figure 1038: Save the Periodic Renewal data**

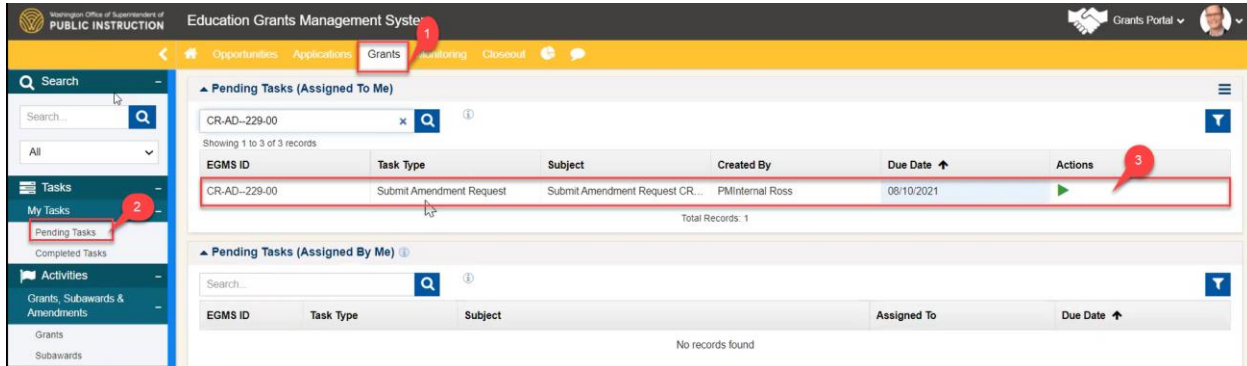
**Figure 1139: Submit to Grantor**

### 10.3.1.6 FUNDING CHANGE REQUEST

Internal OSPI users (Amendment Record Owner) will create the **Funding Change** amendment request and send it to the LEAs.

Login to the **EGMS** recipient portal. Under the **Grants** phase, click on the Pending Tasks link under **My Tasks** in the left navigation panel.

In the **Pending Tasks** (Assigned To Me) table, click on the play icon (▶) to start the process for the related Funding Change Request Amendment request record.



The screenshot shows the 'Education Grants Management System' interface. The top navigation bar includes 'Opportunities', 'Applications', 'Grants', 'Monitoring', and 'Closeout'. The left sidebar has 'Search', 'Tasks', 'My Tasks', and 'Activities'. The main content area displays 'Pending Tasks (Assigned To Me)' with a search bar and a table. The table has columns for 'EGMS ID', 'Task Type', 'Subject', 'Created By', 'Due Date', and 'Actions'. A red box highlights the first row: EGMS ID 'CR-AD-229-00', Task Type 'Submit Amendment Request', Subject 'Submit Amendment Request CR...', Created By 'PMInternal Ross', and Due Date '08/10/2021'. A red callout '3' points to the 'Actions' column of this row. Below this table is another section for 'Pending Tasks (Assigned By Me)' which is currently empty.

**Figure 1240: Funding Change Request**

**Note:**

- For Awards that have Allocations by Focus Area on the Announcement, 'Transferability Options' tab is available on the Funding Change Amendment request to allow transfers from Focus Areas.
- For Awards that **do not** have Allocations by Focus Area on the Announcement, 'Transferability Options' tab is **not** available on the Funding Change Amendment.
- For Awards that have Allocations by Focus Area on the Announcement, Revised Allocation is equal to the sum of 'Allocation Amount', 'Requested Change in Budget' and Net Transfer Amounts from the 'Transferability Options' tab.
- For Awards that **do not** have Allocations by Focus Area on the Announcement, 'Revised Allocation' is equal to the sum of 'Allocation Amount' and 'Requested Change in Budget' fields.

Click the Edit button in the top-right of the page. This will put the amendment in edit mode so that you can edit the information. To make any changes in the Budget, navigate to the **Budget change** section under **the Overview** tab.

For an award without Allocations by Focus Area on the Announcement, you can add/reduce the dollar amount from the 'Requested Indirect Amount' field on the Budget Information section. Click on the edit icon under the actions column to edit the budget amount. Once done, click the **Save** button.

Amendment Request  
**Test\_161303** Cancel Save

EGMS ID: CR-AD--231-01      Status: Sent to Subrecipient      Initiated By: State

Created    Sent to Subrecipient    Submitted to Grantor    Submitted for Approval    Approved

Overview    Files    History    Collab

**Budget Information**

|                             |                            |                              |                                |
|-----------------------------|----------------------------|------------------------------|--------------------------------|
| Allocation Amount           | Requested Change in Budget | Revised Allocation           | Indirect Rate                  |
| \$200,000.00                | \$20,000.00                | \$220,000.00                 | 2.00%                          |
| Maximum Indirect Allowed    | Requested Indirect Amount  | Budgeted Direct Expenditures | Budgeted Indirect Expenditures |
| \$4,314.00                  | 4,000.00                   | \$216,000.00                 | \$4,000.00                     |
| Total Budgeted Expenditures |                            |                              |                                |
| \$220,000.00                |                            |                              |                                |

**Figure 1341: Requested Indirect Amount Overview**

For an award with Allocations by Focus Area on the Announcement, you can add/reduce the dollar amount from the 'Requested Indirect Amount' field on the Allocations and Indirect Cost section.

Total Budgeted Expenditures: \$1,007,000.00

**Allocations and Indirect Costs** Save

Search

\* Records are sorted by Last Modified Date ascending order

| Focus Area/Program | Allocation Amount     | Requested Change in Budget | Revised Allocation    | Maximum Indirect Allowed | Requested Indirect Amount | Allowed Budgeted Direct Expenditure | Budgeted Direct Expenditure | Actions |
|--------------------|-----------------------|----------------------------|-----------------------|--------------------------|---------------------------|-------------------------------------|-----------------------------|---------|
| Title IV, Part A   | \$300,000.00          | \$4,000.00                 | \$303,000.00          | \$5,942.00               | 5,961                     | \$297,039.00                        | \$304,000.00                | ↺       |
| Title II, Part A   | \$300,000.00          | \$2,000.00                 | \$303,000.00          | \$5,942.00               | \$0.00                    | \$303,000.00                        | \$302,000.00                | ✎       |
| Title I, Part A    | \$400,000.00          | \$1,000.00                 | \$401,000.00          | \$7,863.00               | \$0.00                    | \$401,000.00                        | \$401,000.00                | ✎       |
| <b>Total</b>       | <b>\$1,000,000.00</b> | <b>\$7,000.00</b>          | <b>\$1,007,000.00</b> | <b>\$19,747.00</b>       | <b>\$5,961.00</b>         | <b>\$1,001,039.00</b>               | <b>\$1,007,000.00</b>       |         |

Total Records: 3

**Figure 1442: Allocations and Indirect Cost**

Scroll down to the **Budget Change** section to change the existing Budget and match the Budget with the updated allocations. If there is a 'Transferability Option' tab available, please complete the transfers before making changes to the Budget in the **Overview** tab.

| EGMS ID                               | Category Name                 | Debit Transfer | Credit Transfer | Salaries-Certificated | Salaries-Classified | Benefits & Payroll Taxes | Supplies Inst. Resources & Non-Capitalized | Purchased Services | Travel | Capital Outlay | Award Total  | Spent  | Remaining Budget | Revised Budget | Difference | Actions |
|---------------------------------------|-------------------------------|----------------|-----------------|-----------------------|---------------------|--------------------------|--|--------------------|--------|----------------|--------------|--------|------------------|----------------|------------|---------|
| Focus Area : Title I, Part A          |                               |                |                 |                       |                     |                          |  |                    |        |                |              |        |                  |                |            |         |
| AC-2551                               | 11 Board of Directors         | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$400,000.00   | \$400,000.00 | \$0.00 | \$400,000.00     | \$400,000.00   | \$0.00     |         |
| AC-2550                               | 12 Superintendent's Office    | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$1,000.00     | \$0.00       | \$0.00 | \$0.00           | \$1,000.00     | \$1,000.00 |         |
| AC-2549                               | 13 Business Office            | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$0.00         | \$0.00       | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| Total - Focus Area : Title I, Part A  |                               | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$401,000.00   | \$400,000.00 | \$0.00 | \$400,000.00     | \$401,000.00   | \$1,000.00 |         |
| Focus Area : Title II, Part A         |                               |                |                 |                       |                     |                          |  |                    |        |                |              |        |                  |                |            |         |
| AC-2548                               | 14 Financial Services         | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$300,000.00   | \$300,000.00 | \$0.00 | \$300,000.00     | \$300,000.00   | \$0.00     |         |
| AC-2547                               | 15 Human Resources            | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$2,000.00     | \$0.00       | \$0.00 | \$0.00           | \$2,000.00     | \$2,000.00 |         |
| AC-2546                               | 16 Regional Committee         | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$0.00         | \$0.00       | \$0.00 | \$0.00           | \$0.00         | \$0.00     |         |
| Total - Focus Area : Title II, Part A |                               | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$302,000.00   | \$300,000.00 | \$0.00 | \$300,000.00     | \$302,000.00   | \$2,000.00 |         |
| Focus Area : Title IV, Part A         |                               |                |                 |                       |                     |                          |  |                    |        |                |              |        |                  |                |            |         |
| AC-2545                               | 17 Public Information         | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$300,000.00   | \$300,000.00 | \$0.00 | \$300,000.00     | \$300,000.00   | \$0.00     |         |
| AC-2544                               | 20 Supervision of Instruction | \$0.00         | \$0.00          | \$0.00                | \$0.00              | \$0.00                   | \$0.00                                     | \$0.00             | \$0.00 | \$4,000.00     | \$0.00       | \$0.00 | \$0.00           | \$4,000.00     | \$4,000.00 |         |

Figure 1543: Budget Change

For an award with Allocations by Focus Area on the Announcement, navigate to the **Transferability Options** tab and enter the required details in the Purpose section.

Amendment Request
Cancel Save

**App for Test 157154**

EGMS ID: CR-AD-197-00      Status: Sent to Subrecipient      Initiated By: State

Created ✓    Sent to Subrecipient ✓    Submitted to Grantor ○    Submitted for Approval ○    Approved ○

Overview **Transferability Options** Files History Collab

**Purpose**

Transferability is a flexibility authority under the Every Student Succeeds Act (ESSA) which allows Local Educational Agencies (LEAs) to transfer up to 100% of the funds they receive under Title II, Part A and Title IV, Part A to other programs to better address the needs of their unique student populations and to ensure the capacity of delivering a meaningful program. Federal regulations require LEAs to notify the State Education Agency 30 days prior to the transfer of funds. (Elementary and Secondary Education Act (ESEA) Section 5103.

ESEA Section 5103

**NOTE:** Although there is no deadline for exercising transferability, we strongly encourage LEAs to make the decision as early as possible, so applicable program applications can be adjusted by LEA staff and approved by OSPI.

1. Are you going to exercise your transferability option?

[Transferability Process Guide](#)  
[Transferability Q&A](#)  
[Transferability & Carryover Q&A](#)

Figure 1644: Transferability Options- Purpose

In the **Transferability Options** tab, scroll down to the Transferability Details section and click on the **Add** button. Enter a **Transfer From**, **Transfer To** focus areas, and **Transfer Amount**. Click on **Save**.

Overview **Transferability Options** Files History Collab

▼ Purpose

▲ Transferability Summary ☰

*\* Records are sorted by Last Modified Date ascending order*

| Focus Area/Program | Allocation Amount <sup>(1)</sup> | Transferred Out Amount | Transferred In Amount |
|--------------------|----------------------------------|------------------------|-----------------------|
| Title IV, Part A   | \$304,000.00                     | \$1,000.00             | \$0.00                |
| Title II, Part A   | \$302,000.00                     | \$0.00                 | \$1,000.00            |
| Title I, Part A    | \$401,000.00                     | \$0.00                 | \$0.00                |

▲ Transferability Details **Add** ☰

*\* Records are sorted by Last Modified Date ascending order*

| Transfer From    | Transfer To      | Transfer Amount | Actions |
|------------------|------------------|-----------------|---------|
| Title IV, Part A | Title II, Part A | \$1,000         |         |

**Figure 1745: Transferability Details**

Once completed, click on **Submit to Grantor** button. Once clicked, the status will change to **Submitted to Grantor**.

Amendment Request  
**App for Test 157154** **Edit** **Submit to Grantor** ☰

EGMS ID: CR-AD--197-00      Status: Sent to Subrecipient      Initiated By: State

Created      Sent to Subrecipient      Submitted to Grantor      Submitted for Approval      Approved

Overview **Transferability Options** Files History Collab

▲ Purpose

Transferability is a flexibility authority under the Every Student Succeeds Act (ESSA) which allows Local Educational Agencies (LEAs) to transfer up to 100% of the funds they receive under Title II, Part A and Title IV, Part A to other programs to better address the needs of their unique student populations and to ensure the capacity of delivering a meaningful program. Federal regulations require LEAs to notify the State Education Agency 30 days prior to the transfer of funds. (Elementary and Secondary Education Act (ESEA) Section 5103:

[ESEA Section 5103](#)

**NOTE:** Although there is no deadline for exercising transferability, we strongly encourage LEAs to make the decision as early as possible, so applicable program applications can be adjusted by LEA staff and approved by OSPI.

1. Are you going to exercise your transferability option?  
Yes

[Transferability Process Guide](#)  
[Transferability Q&A](#)  
[Transferability & Carryover Q&A](#)

When an LEA decides to transfer some or all of the funds allocated for local activities under the two eligible programs, it must take certain steps. The LEA must:

**Figure 1846: Submit to Grantor**

# 11 MONITORING

## 11.1 PROGRESS REPORTS

A Progress Report is a periodic report submitted by the Recipient describing the status, accomplishments, and issues of the Project. The grantor will define the frequency of the Progress Report during subaward creation.

### 11.1.1 COMPLETING A PROGRESS REPORT

Login to the EGMS Grants portal. Click on the **Monitoring** module and click the **'Pending Tasks'** link under **My Tasks** in the left-hand navigation menu. On the Pending Tasks page, locate the Progress Report within the **Pending Tasks (Assigned to Me)** table and click the **Start** (▶) icon under the **Actions** column.

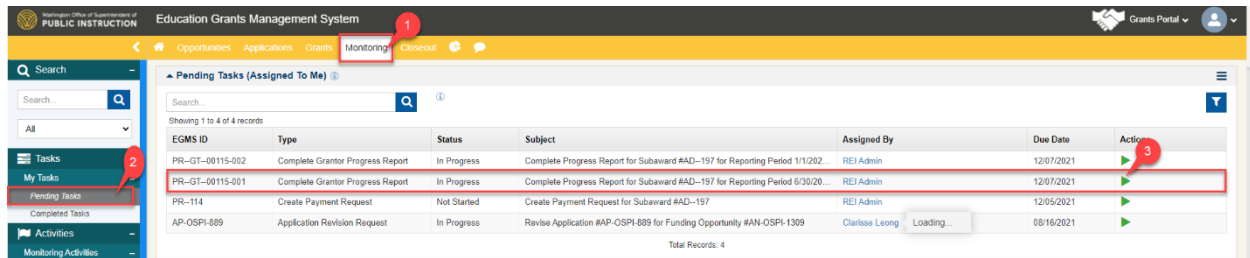


Figure 147: Progress Report Request

The **Report Overview** section within the **Overview** tab displays information such as Reporting Period, Report Due Date, Report Frequency, Progress Report Due Date, Budget Period and Budget Period Number. If this is the Final Report check the **Final Report?** checkbox.

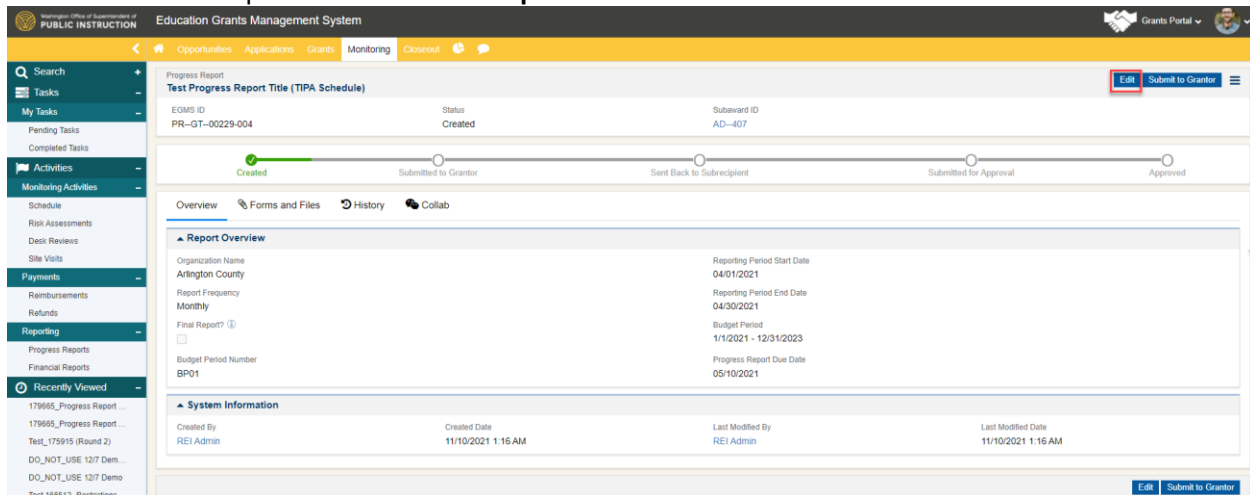


Figure 148: Editing a Progress Report

Navigate to **Forms and Files** tab. Under the **All Form** section, click on edit action to fill the form details.

The screenshot shows the 'Forms and Files' tab for a progress report titled 'Test Progress Report Title (TIPA Schedule)'. The report is in 'Created' status. A progress bar shows the current step is 'Created', with subsequent steps being 'Submitted to Grantor', 'Sent Back to Subrecipient', 'Submitted for Approval', and 'Approved'. Below the progress bar, the 'Forms and Files' section is active, displaying a table of forms. The table has columns for Sequence Number, Form Name, Is Form Validated?, Mandatory, Last Modified By, Last Modified Date, and Actions. The 'Actions' column for each row contains an edit icon (pencil) and a delete icon (trash). A red box highlights the edit icon for the first form in the list.

| Sequence Number | Form Name                         | Is Form Validated? | Mandatory | Last Modified By | Last Modified Date | Actions         |
|-----------------|-----------------------------------|--------------------|-----------|------------------|--------------------|-----------------|
|                 | Title I Part C Migrant Educa...   | No                 | ✓         | Roger F          | 12/07/2021 8:17 PM | [Edit] [Delete] |
|                 | Class Size Reduction End o...     | No                 | ✓         | Roger F          | 11/10/2021 4:47 AM | [Edit] [Delete] |
|                 | Title II, Part A End of Year R... | No                 | ✓         | Roger F          | 11/10/2021 4:47 AM | [Edit] [Delete] |
|                 | Title I, Part A End-of-Year R...  | No                 | ✓         | Roger F          | 11/10/2021 4:47 AM | [Edit] [Delete] |
|                 | Professional Learning Plans       | No                 | ✓         | Roger F          | 11/10/2021 4:47 AM | [Edit] [Delete] |
|                 | Teacher/Principal Recruitm...     | No                 | ✓         | Roger F          | 11/10/2021 4:47 AM | [Edit] [Delete] |
|                 | Class Size Reduction End o...     | No                 | ✓         | Roger F          | 11/10/2021 4:47 AM | [Edit] [Delete] |

Figure 149: Editing a Progress Report – Edit Form

In the **Files** or **Notes** section, you can attach by clicking on **Add** button in the respective section.

The screenshot shows the 'Files' and 'Notes' sections of the progress report. The 'Progress Report Files' section displays a table with columns for Title, Classification, File Extension, Description, and Actions. A red box highlights the 'Add Files' button in the top right corner of this section. Below it, the 'Supporting Documents Checklist' section is shown, which is currently empty. A green notification banner at the bottom of the checklist area says 'Saved Successfully!'. The 'Notes' section at the bottom has an 'Add' button highlighted with a red box. It contains a table with columns for Title, Description, Created Date, Created By, and Actions. A note is visible: 'Please approve this report' with a description of 'I have verified the report', created on 12/07/2021 8:28 PM by Roger F.

Figure 150: Editing a Progress Report- Add Files or Notes

Once all the details are filled, click on the **Submit to Grantor** button at the top right side of the screen. The status of the Progress report is now updated to "Submitted to Grantor".

The figure consists of two screenshots of the Education Grants Management System (EGMS) interface. The top screenshot shows a progress report titled "Test Progress Report Title (TIPA Schedule)" with a status of "Created". The progress bar indicates the report is in the "Created" stage. The bottom screenshot shows the same report with a status of "Submitted to Grantor", which is highlighted by a red box. The progress bar now shows the report has moved to the "Submitted to Grantor" stage. Both screenshots include a left-hand navigation menu with categories like Search, Tasks, My Tasks, Monitoring Activities, Payments, Reporting, and Recently Viewed. The main content area displays report details such as Organization Name (Arlington County), Reporting Period Start/End Dates, Report Frequency (Monthly), Budget Period (BP01), and System Information (Created By: REI Admin, Created Date: 11/10/2021 1:16 AM, Last Modified By: Roger F, Last Modified Date: 12/07/2021 8:30 PM).

Figure 151: Submitting Progress Report to Grantor

## 11.2 PAYMENT REQUEST

A deliverable to submit a Payment Requests is created at a frequency that is defined by the grantor. Payment Requests allows Recipients to draw-down on awarded funds as a Reimbursement or Advance within the EGMS. Before submitting a Payment Request, you will have received an award, and you will be within an active Budget Period. A payment request task is created as per the payment request schedule on the award.

### 11.2.1 SUBMITTING A PAYMENT REQUEST

Login to the EGMS Grants portal. Click on the **Monitoring** module and click the 'Pending Tasks' link under **My Tasks** in the left-hand navigation menu. On the Pending Tasks page, locate the Payment Request within the **Pending Tasks (Assigned to Me)** table and click the **Start** (▶) icon under the **Actions** column.



Education Grants Management System

Opportunities Applications Grants Monitoring Closeout

Search

Search..

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Organization

Organization Profile

Recently Viewed

Technical Support

Contact Us

Pending Tasks (Assigned To Me)

payment

Showing 1 to 10 of 24 records

| EGMS ID  | Task Type              | Subject                                   | Created By     | Due Date   | Actions |
|----------|------------------------|---|----------------|------------|---------|
| PR-PR-02 | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 08/17/2021 |         |
| PR-117   | Create Payment Request | Create Payment Request for Subaward #A... | Shallesh Admin | 08/27/2021 |         |
| PR-118   | Create Payment Request | Create Payment Request for Subaward #A... | REI Admin      | 08/27/2021 |         |
| PR-119   | Create Payment Request | Create Payment Request for Subaward #A... | REI Admin      | 08/27/2021 |         |
| PR-124   | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 08/29/2021 |         |
| PR-135   | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 08/30/2021 |         |
| PR-138   | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 08/30/2021 |         |
| PR-142   | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 08/31/2021 |         |
| PR-179   | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 09/07/2021 |         |
| PR-197   | Create Payment Request | Create Payment Request for Subaward #A... | QA Admin       | 09/08/2021 |         |

Show 10 Entries Total Records: 24

Page 1 of 3

**Figure 152: Initiating a Payment Request**

Click the **Edit** button in the top-right of the page. This will put the payment request in edit mode so that you can edit the information.

Education Grants Management System

Opportunities Applications Grants Monitoring Closeout

Search

Search..

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Organization

Organization Profile

Recently Viewed

Technical Support

Contact Us

Reimbursement Payment Request

164619\_Fiscal Contact on App

Edit Submit to Grantor

| EGMS ID | Status  | Subaward | Budget Period        |
|---------|---------|----------|----------------------|
| PR-118  | Created | AD-266   | 5/1/2021 - 2/28/2022 |

Created Submitted to Grantor Submitted for Approval Approved

Overview Financials Files History Collab

General Information

|                           |                           |                           |
|---------------------------|---------------------------|---------------------------|
| Subrecipient Organization | Type                      | Payment Period Start Date |
| Arlington County          | Reimbursement             | 12/01/2021                |
| Payment Period End Date   | Due Date                  | Submission Date           |
| 12/31/2021                | 01/15/2022                |                           |
| Payment Date              | Is Final Payment Request? | Processing Status         |
|                           | <input type="checkbox"/>  |                           |

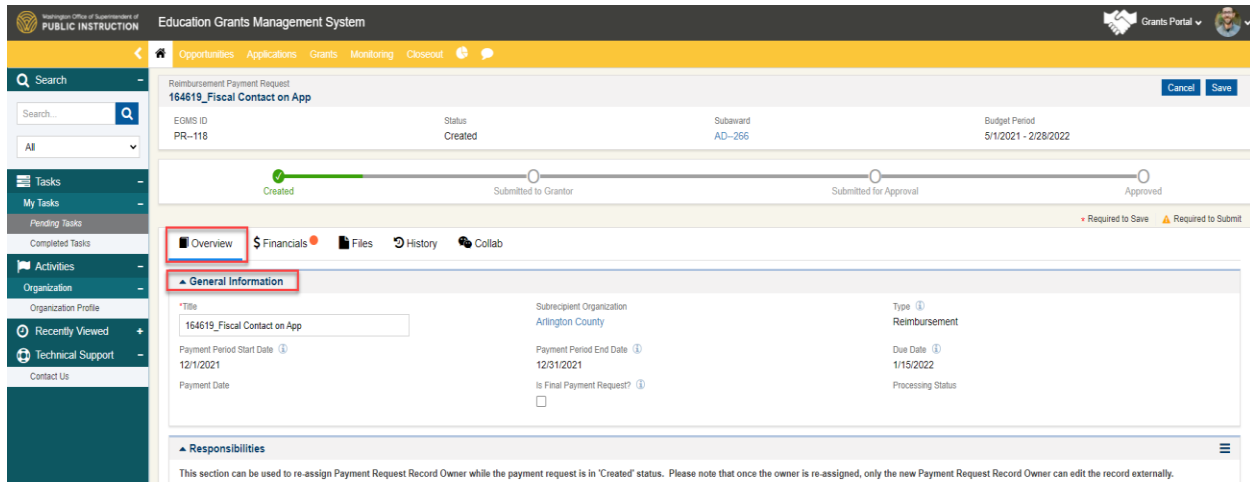
Responsibilities

This section can be used to re-assign Payment Request Record Owner while the payment request is in "Created" status. Please note that once the owner is re-assigned, only the new Payment Request Record Owner can edit the record externally.

\*Records are sorted by Created Date ascending order

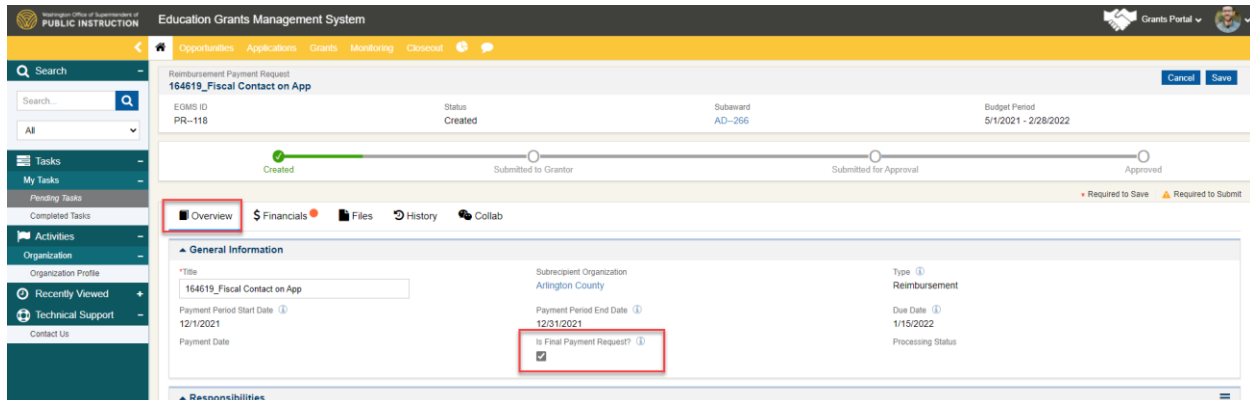
**Figure 153: Edit mode**

Add the required details in the General Information section under the Overview tab on the Payment Request page.



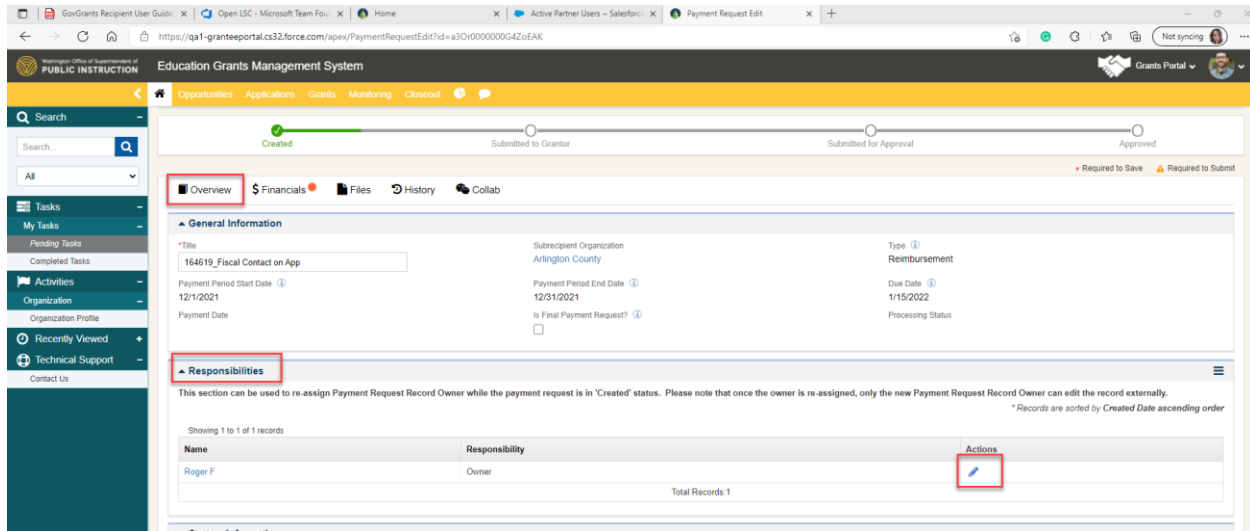
**Figure 154: Overview Tab**

- If this is your organization's final Payment Request, click the Is Final Payment Request? checkbox.



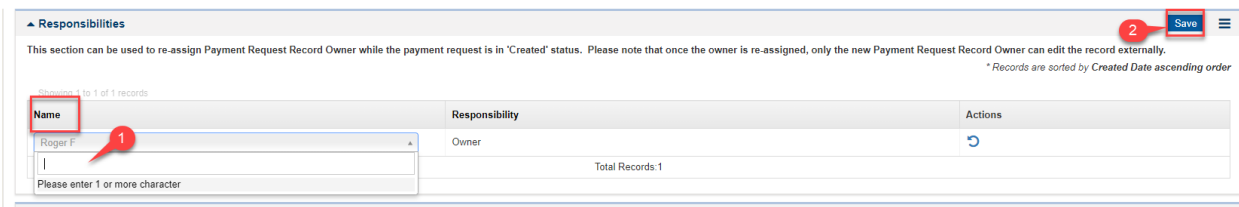
**Figure 155: Final Payment Checkbox**

Scroll down to the **Responsibilities** section to change the **Owner**. Click on the Edit icon and select any external user for that organization as an owner. This section can be used to re-assign the Payment Request Record Owner while the payment request is in **Created status**. Please note that only the new Payment Request Record Owner can edit the record externally once the Owner is re-assigned.

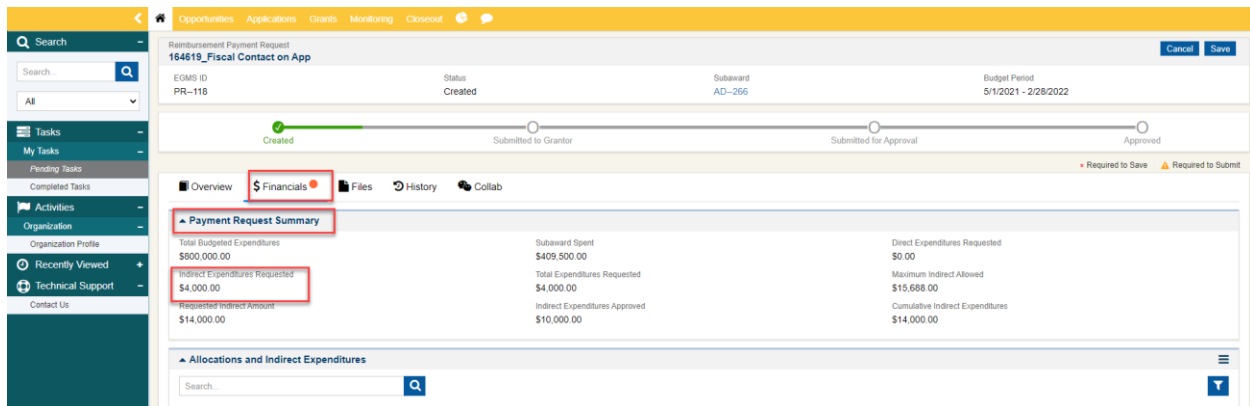


**Figure 156: Responsibilities**

Once you choose any of the external Users, then click on **Save**. PR--118



Navigate to the Financial tab. For an award without Allocations by Focus Area on the Announcement, you can add an indirect claim amount in the **Indirect Expenditures Requested** field on the **Payment Request Summary** section.



**Figure 157: Indirect Expenditures Requested**

For an award with Allocations by Focus Area on the Announcement, you can add an indirect claim amount in the **Indirect Expenditures Requested** column on the **Allocations and Indirect Expenditures** section. Click on the **Edit** (Pencil) icon to enter the Indirect Expenditures, click **Save**.

Washington Office of Superintendent of PUBLIC INSTRUCTION Education Grants Management System

Opportunities Applications Grants Monitoring Closeout

Search: [ ] All

Tasks: My Tasks, Pending Tasks, Completed Tasks, Activities, Organization, Organization Profile, Recently Viewed, Technical Support, Contact Us

|   |   |   |
|---|---|---|
| Total Budgeted Expenditures<br>\$800,000.00   | Subaward Spent<br>\$409,500.00                | Direct Expenditures Requested<br>\$0.00         |
| Indirect Expenditures Requested<br>\$4,000.00 | Total Expenditures Requested<br>\$4,000.00    | Maximum Indirect Allowed<br>\$15,688.00         |
| Requested Indirect Amount<br>\$14,000.00      | Indirect Expenditures Approved<br>\$10,000.00 | Cumulative Indirect Expenditures<br>\$14,000.00 |

**Allocations and Indirect Expenditures**

| Focus Area/Program | Allocation Amount   | Maximum Indirect Allowed | Requested Indirect Amount | Indirect Expenditures Approved | Indirect Expenditures Requested | Cumulative Indirect Expenditures | Actions  |
|--------------------|---------------------|--------------------------|---------------------------|--------------------------------|---------------------------------|----------------------------------|----------|
| Title I, Part A    | \$250,000.00        | \$4,902.00               | \$4,500.00                | \$2,500.00                     | \$2,000.00                      | \$4,500.00                       | [Pencil] |
| Title II, Part A   | \$50,000.00         | \$981.00                 | \$500.00                  | \$500.00                       | \$0.00                          | \$500.00                         | [Pencil] |
| Title III, Part A  | \$150,000.00        | \$2,942.00               | \$2,500.00                | \$2,000.00                     | \$0.00                          | \$2,500.00                       | [Pencil] |
| Title IV, Part A   | \$350,000.00        | \$6,863.00               | \$6,500.00                | \$5,000.00                     | \$1,500.00                      | \$6,500.00                       | [Pencil] |
| <b>Total</b>       | <b>\$800,000.00</b> | <b>\$15,688.00</b>       | <b>\$14,000.00</b>        | <b>\$10,000.00</b>             | <b>\$4,000.00</b>               | <b>\$14,000.00</b>               |          |

**Allocations and Indirect Expenditures** [Save]

Search: [ ]

| Focus Area/Program | Allocation Amount   | Maximum Indirect Allowed | Requested Indirect Amount | Indirect Expenditures Approved | Indirect Expenditures Requested | Cumulative Indirect Expenditures | Actions  |
|--------------------|---------------------|--------------------------|---------------------------|--------------------------------|---------------------------------|----------------------------------|----------|
| Title I, Part A    | \$250,000.00        | \$4,902.00               | \$4,500.00                | \$2,500.00                     | 2,000                           | \$4,500.00                       | [Pencil] |
| Title II, Part A   | \$50,000.00         | \$981.00                 | \$500.00                  | \$500.00                       | 200                             | \$500.00                         | [Pencil] |
| Title III, Part A  | \$150,000.00        | \$2,942.00               | \$2,500.00                | \$2,000.00                     | 500                             | \$2,500.00                       | [Pencil] |
| Title IV, Part A   | \$350,000.00        | \$6,863.00               | \$6,500.00                | \$5,000.00                     | 5,000                           | \$6,500.00                       | [Pencil] |
| <b>Total</b>       | <b>\$800,000.00</b> | <b>\$15,688.00</b>       | <b>\$14,000.00</b>        | <b>\$10,000.00</b>             | <b>\$4,000.00</b>               | <b>\$14,000.00</b>               |          |

Figure 158: Allocations and Indirect Expenditures

Within the **Financials** tab, navigate to the **Payment Request Budget** section. The section lists the Budget Categories and the awarded amount that is allocated to each Budget Category. Locate the Budget Category you want to request funds and click the **Pencil** ( ) icon under the **Action** column.

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Opportunities Applications Grants Monitoring Closeout

Search: [ ] All

Tasks: My Tasks, Pending Tasks, Completed Tasks, Activities, Organization, Organization Profile, Recently Viewed, Technical Support, Contact Us

|                   |                     |                    |                    |                    |                   |                    |          |
|-------------------|---------------------|--------------------|--------------------|--------------------|-------------------|--------------------|----------|
| Title III, Part A | \$150,000.00        | \$2,942.00         | \$2,500.00         | \$2,000.00         | 500               | \$2,500.00         | [Pencil] |
| Title IV, Part A  | \$350,000.00        | \$6,863.00         | \$6,500.00         | \$5,000.00         | 5,000             | \$6,500.00         | [Pencil] |
| <b>Total</b>      | <b>\$800,000.00</b> | <b>\$15,688.00</b> | <b>\$14,000.00</b> | <b>\$10,000.00</b> | <b>\$4,000.00</b> | <b>\$14,000.00</b> |          |

**Payment Request Budget**

Search: [ ]

\* Records are sorted by Focus Area ascending order, Budget Category ascending order, RowNumber ascending order

Showing 1 to 6 of 6 records

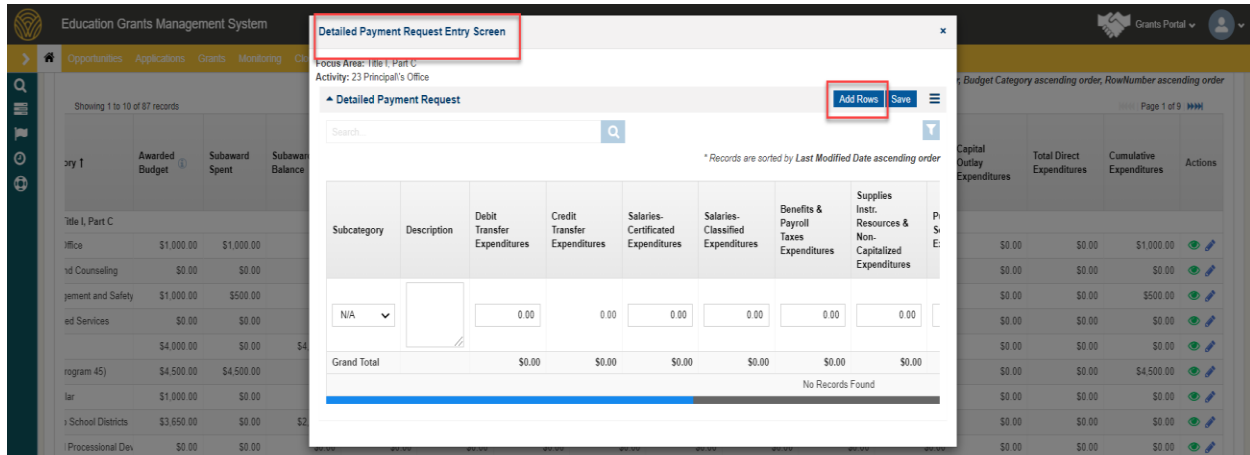
| Budget Category                               | Awarded Budget      | Subaward Spent      | Subaward Balance    | Total Direct Expenditures | Cumulative Expenditures | Actions  |
|---|---------------------|---------------------|---------------------|---------------------------|-------------------------|----------|
| <b>Focus Area : Title I, Part A</b>           |                     |                     |                     |                           |                         |          |
| 11 Site Purchases                             | \$150,000.00        | \$75,000.00         | \$75,000.00         | \$0.00                    | \$75,000.00             | [Pencil] |
| 22 Building Remodeling                        | \$95,500.00         | \$45,500.00         | \$50,000.00         | \$0.00                    | \$45,500.00             | [Pencil] |
| <b>Total - Focus Area : Title I, Part A</b>   | <b>\$245,500.00</b> | <b>\$120,500.00</b> | <b>\$125,000.00</b> | <b>\$0.00</b>             | <b>\$120,500.00</b>     |          |
| <b>Focus Area : Title II, Part A</b>          |                     |                     |                     |                           |                         |          |
| 31 Initial Equipment                          | \$49,500.00         | \$29,000.00         | \$20,500.00         | \$0.00                    | \$29,000.00             | [Pencil] |
| <b>Total - Focus Area : Title II, Part A</b>  | <b>\$49,500.00</b>  | <b>\$29,000.00</b>  | <b>\$20,500.00</b>  | <b>\$0.00</b>             | <b>\$29,000.00</b>      |          |
| <b>Focus Area : Title III, Part A</b>         |                     |                     |                     |                           |                         |          |
| 41 Energy Audits                              | \$147,500.00        | \$100,000.00        | \$47,500.00         | \$0.00                    | \$100,000.00            | [Pencil] |
| <b>Total - Focus Area : Title III, Part A</b> | <b>\$147,500.00</b> | <b>\$100,000.00</b> | <b>\$47,500.00</b>  | <b>\$0.00</b>             | <b>\$100,000.00</b>     |          |
| <b>Focus Area : Title IV, Part A</b>          |                     |                     |                     |                           |                         |          |
| 12 Site Improvements                          | \$190,000.00        | \$95,000.00         | \$95,000.00         | \$0.00                    | \$95,000.00             | [Pencil] |
| 32 Additional Equipment                       | \$153,500.00        | \$65,000.00         | \$88,500.00         | \$0.00                    | \$65,000.00             | [Pencil] |
| <b>Total - Focus Area : Title IV, Part A</b>  | <b>\$343,500.00</b> | <b>\$160,000.00</b> | <b>\$183,500.00</b> | <b>\$0.00</b>             | <b>\$160,000.00</b>     |          |
| <b>Grand Total</b>                            | <b>\$786,000.00</b> | <b>\$409,500.00</b> | <b>\$376,500.00</b> | <b>\$0.00</b>             | <b>\$409,500.00</b>     |          |

Total Records: 6

Figure 1959: Payment Request Budget

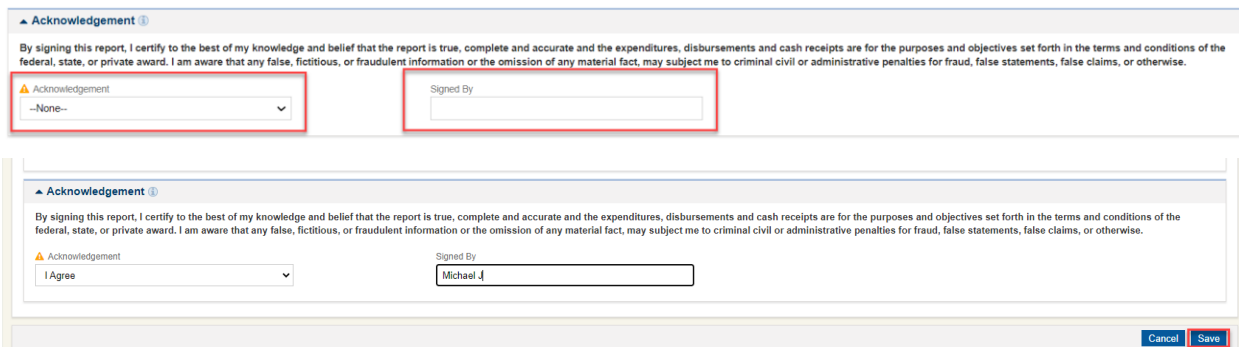
For **General Fund** detailed budgets, a modal window opens to enter line-item claim details. Use the **Edit** (pencil) icon to add values. Click on **Add Rows**, if needed.

For **Capital** non- detailed budgets, users enter single lines per budget category.



**Figure 2060: Payment Request Budget: Add Rows**

Under the **Acknowledgement** section, select **I Agree** under the **Acknowledgement** field, then fill out the **Signed By** field, then click on **Save**.



**Figure 161: Acknowledgement**

As a payment request record owner you can upload an Excel file with the payments, so can easily enter and update payments on the payment request. When you click the '**Download in Excel**' action, the downloaded Excel shows all records already entered in the payment request budget section. Also, downloaded Excel shows only the columns which are shown in the payment request budget section.

**Figure 162: Download in Excel**

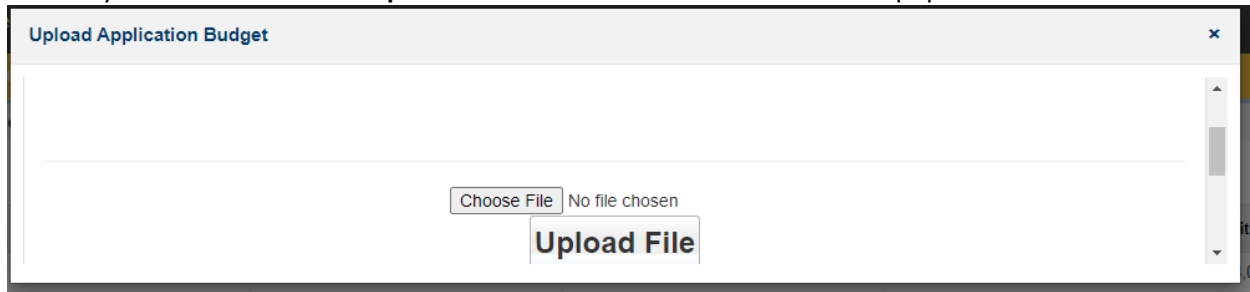
Enter the payments in the downloaded template and click on **Save**. Click on **“Upload Excel”** to upload Payments. Locate your file and click the **“Upload”** button. The Excel details will be populated in the section.

**NOTE: For detailed budget ‘By Subcategory’ or ‘By School’, do not enter any value or make any changes to the existing value in the ‘Reference ID’ column in the downloaded excel.**

| Record Id          | Focus Area    | Category    | School      | School Co | Debit Trar | Credit Tra | Salaries-C | Salaries-CI | Benefits & Supplies | Purchased Travel | Capital O | Cash Matc | Non-Cash Mat |
|--------------------|---------------|-------------|-------------|-----------|------------|------------|------------|-------------|---------------------|------------------|-----------|-----------|--------------|
| a2cr0000001Q4vrAAC | Title IV, Pe  | 22 Curricu  | Intern Sch  | 9999      | 0          | 0          | 20000      | 0           | 0                   | 9000             | 0         | 5000      | 3000         |
| a2cr0000001Q4vmAAC | Title IV, Pe  | 21 Staff De | Arlington   | 7777      | 0          | 0          | 10000      | 10000       | 10000               | 10000            | 10000     | 2000      | 0            |
| a2cr0000001Q4vhAAC | Title III, Pa | 15 Human    | Intern Sch  | 9999      | 50000      | 0          | 0          | 0           | 49000               | 0                | 0         | 7000      | 3000         |
| a2cr0000001Q4uqAAC | Title II, Pa  | 13 Buisine  | Intern Sch  | 9999      | 20000      | 0          | 0          | 0           | 0                   | 5000             | 10000     | 10000     | 3000         |
| a2cr0000001Q4vcAAC | Title II, Pa  | 14 Financi  | Private Sci | 5046      | 0          | 0          | 10000      | 10000       | 0                   | 0                | 9000      | 0         | 1000         |
| a2cr0000001Q4m2AAC | Title I, Par  | 11 Board c  | washingto   | 8888      | 10000      | 0          | 0          | 0           | 0                   | 0                | 25000     | 0         | 1000         |
| a2cr0000001Q4nVAAS | Title I, Par  | 12 Superir  | Arlington   | 7777      | 0          | 0          | 4000       | 0           | 0                   | 0                | 0         | 4000      | 5000         |
| a2cr0000001Q4u4AAC | Title I, Par  | 11 Board c  | Arlington   | 7777      | 30000      | 0          | 0          | 0           | 0                   | 0                | 20000     | 0         | 5000         |
| a2cr0000001Q4naAAC | Title II, Pa  | 14 Financi  | Arlington   | 7777      | 0          | 0          | 0          | 0           | 0                   | 0                | 5000      | 0         | 3000         |

**Figure 163: Upload Excel**

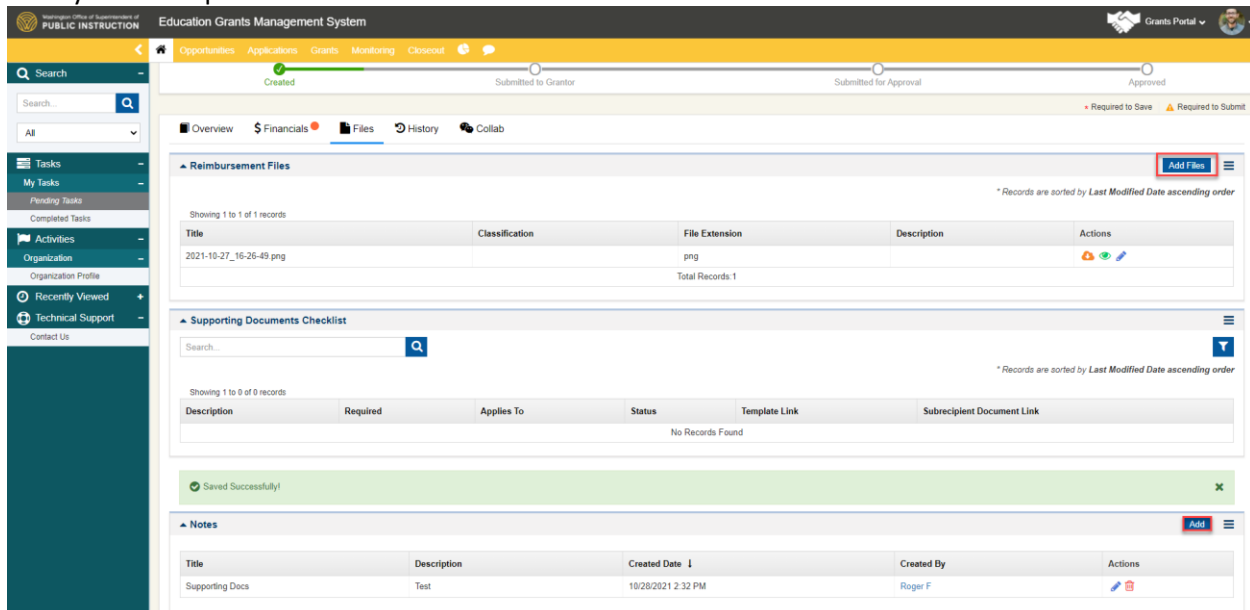
Choose your File and click the **Upload File** button. The Excel details will be populated in the section



**Notes:**

- You cannot upload an Excel with more than one row with the same combination of Focus Area and Budget Category more than once for General Budget with Detailed Budget as 'N/A' or for Capital Budget.
- You cannot upload an Excel with more than one row of Focus Area/Budget Category/School Code combination multiple times.

Within the **Files** tab, you can add supporting attachments such as an invoice or receipt that is related to the Payment Request. You can also add notes related to the Payment Request within the **Files** tab. To add invoices or receipts navigate to the **Files** section and click the **Add** button. In the **Add Files** popup window, you have the option to upload an attachment from your computer or a previously uploaded file from your workspace.



**Figure 164: Add Attachments/Notes**

After making the necessary updates and click on **Save** on the top right corner of the page.

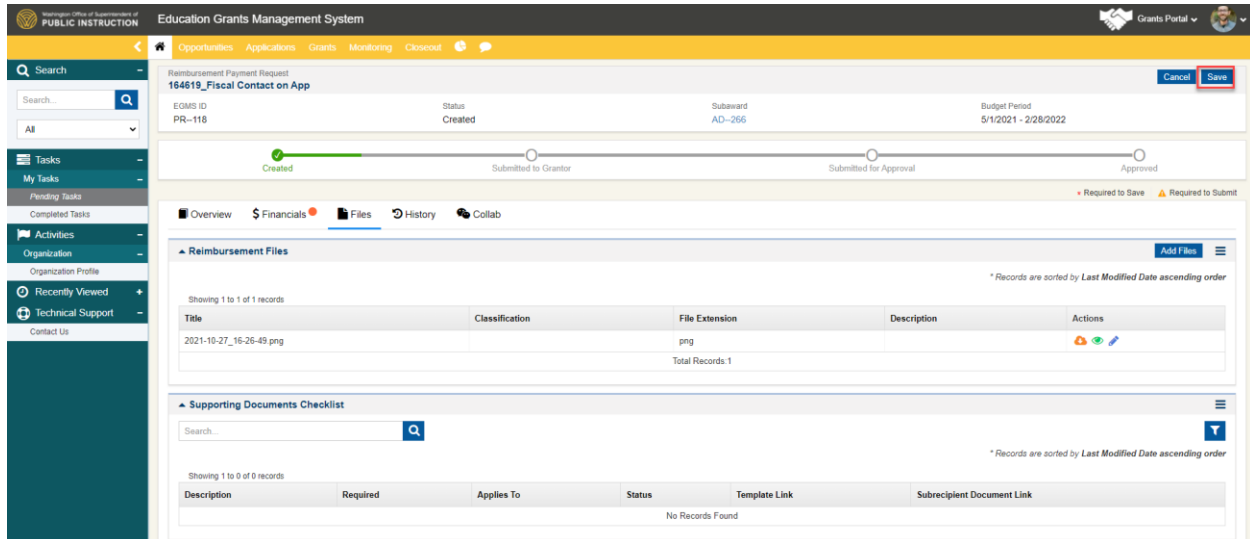


Figure 165: Save

Once you have entered the required and additional information in the Payment Request, click the **Submit to Grantor** button.

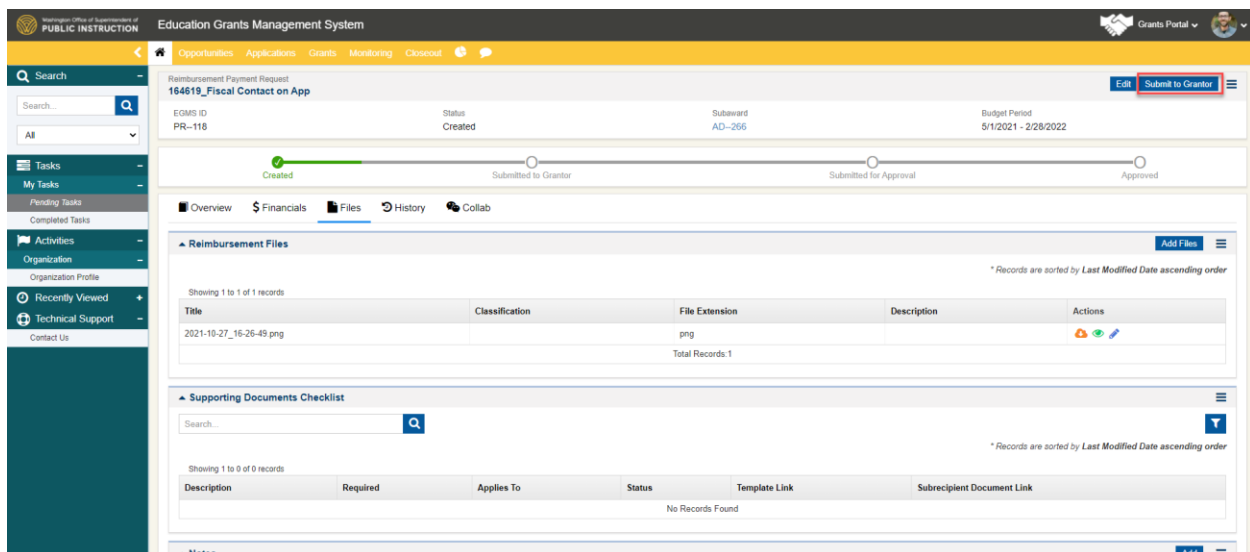
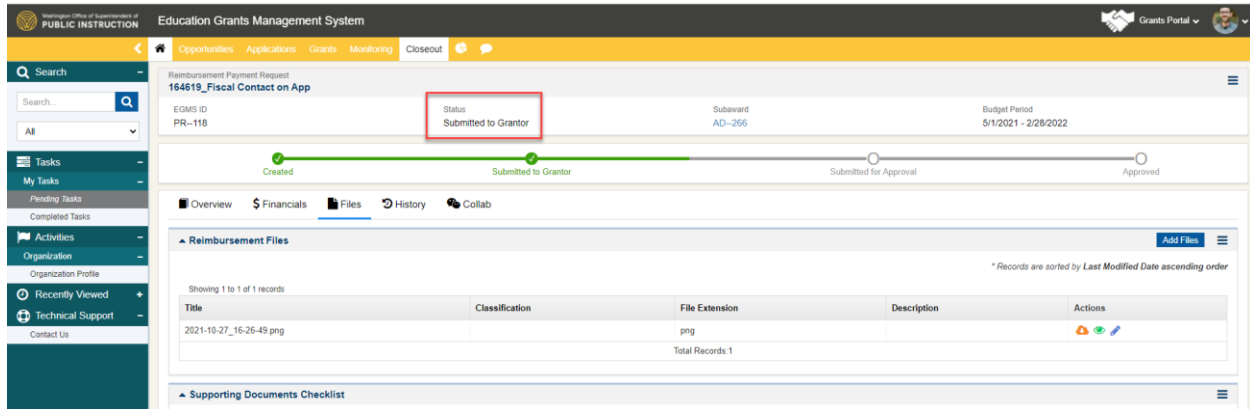


Figure 166: Submitting the Payment Request to Grantor



The status of the Payment Request is now updated to **Submitted to Grantor**.



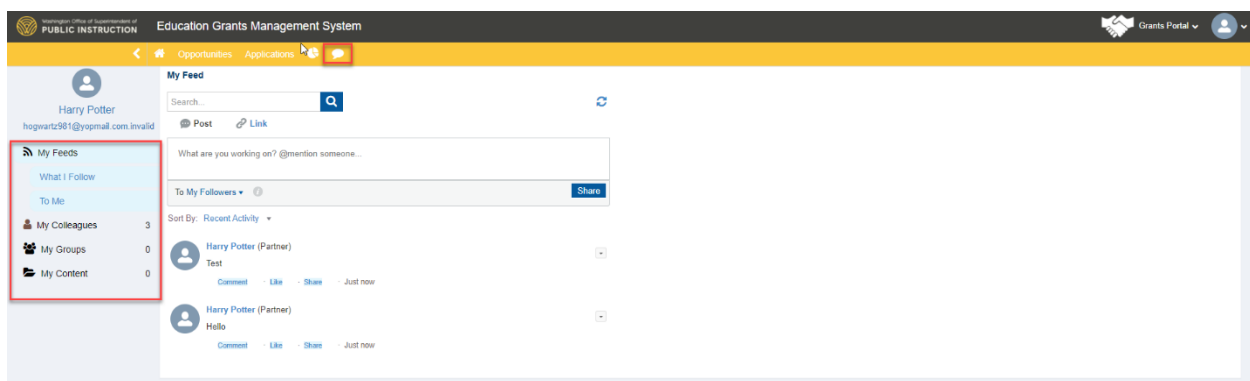
**Figure 167: Submitted to Grantor**

**Note:**

- Payment Request cannot be submitted after the due date. The pending task would be 'Force Closed' if the due date is in the past.
- Payments cannot be submitted if OSPI has restricted submission of payments for a Grant.
- Users can enter negative claim amounts.

## 12 COLLABORATION (COLLAB)

Collaboration tab allows and tracks the internal communication between the users. This page displays all feeds of logged in user that are either followings, related colleagues, external users, files or their contents.



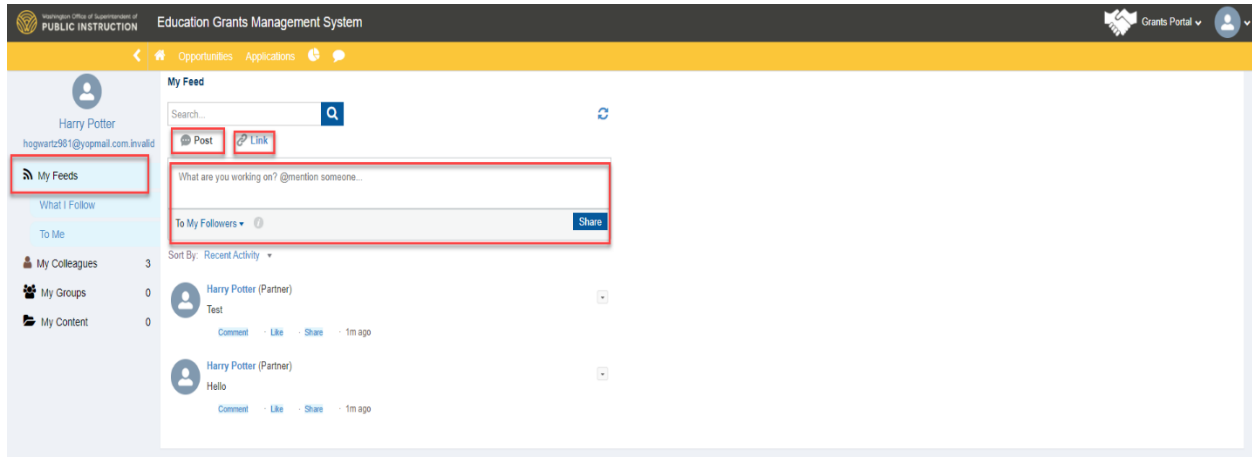
**Figure 2168: Collaboration**

## 12.1 MY FEEDS

Users can post their feeds from My Feeds section. To post the feed, enter the post details in the click on Post link or to attach the link, click on Link.

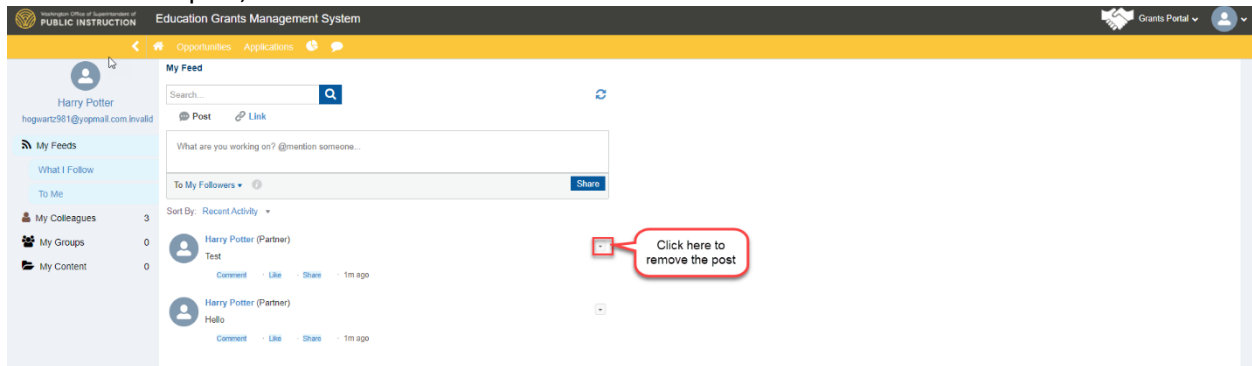
Provide the details in the text area to share. You have the option to select to whom you want to share your post like to followers or to groups. One clicked the Share button; the post will be shared on the page. To tag the user, use @ to mention user.

Followers can comment or like or share the posted feeds by other users.



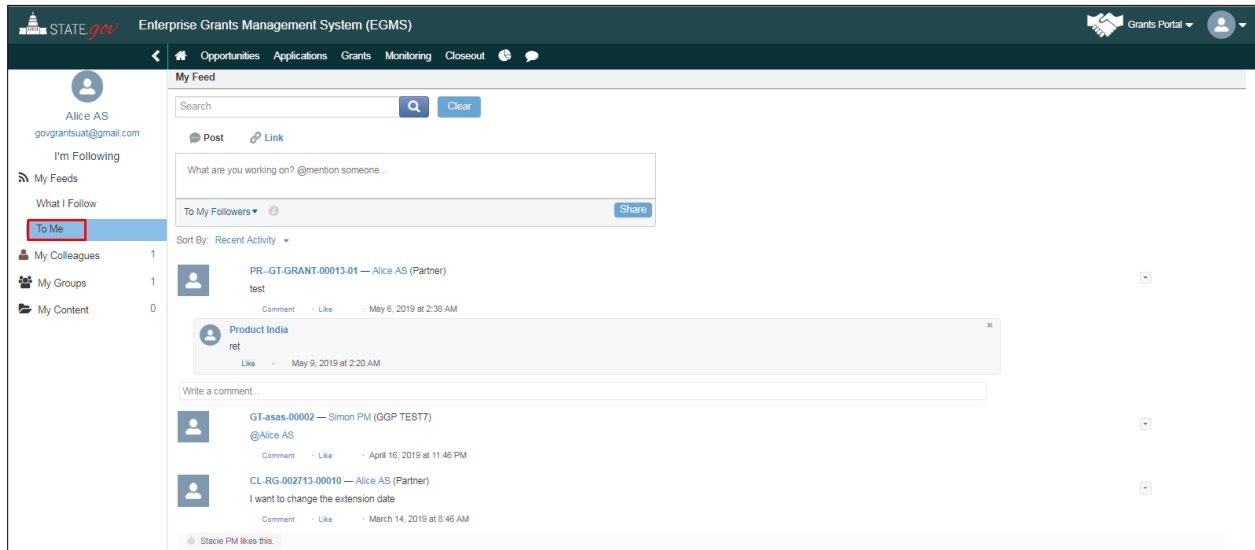
**Figure 2269: My Feeds**

To remove the post, click on the '⌵' in front of the feed.



**Figure 2370: Posted Feed**

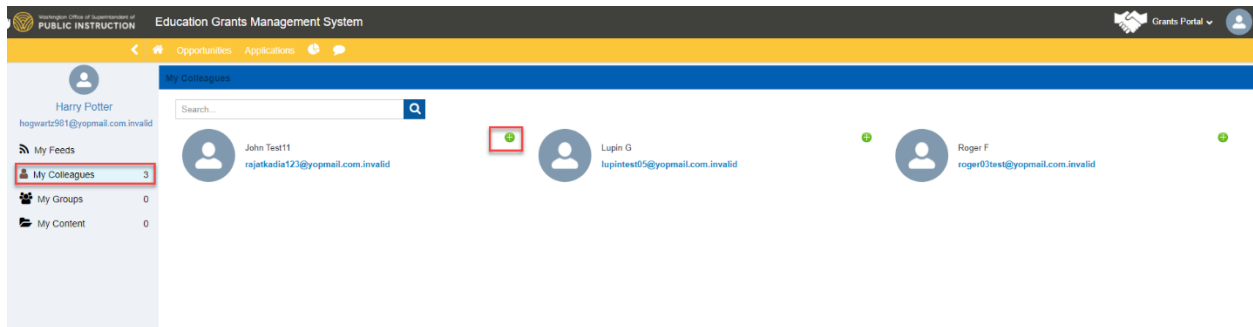
To view the tagged feeds, click on the 'To Me' link under **My Feeds** I left navigation panel.



**Figure 2471: 'To Me' Feeds**

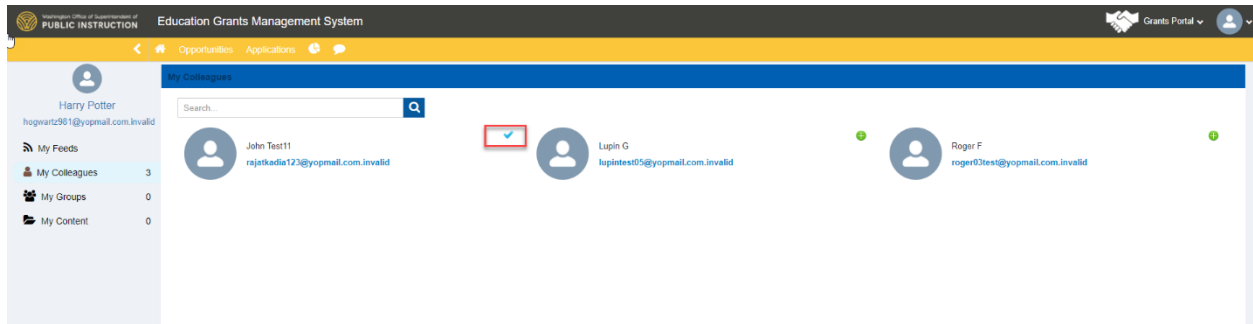
## 12.2 MY COLLEAGUES

The user can see their colleagues list on the page. To search the colleague from the list, enter his name in the search field. To follow the person, click on the '+' icon in front of the contact person name.



**Figure 2572: My Colleagues**

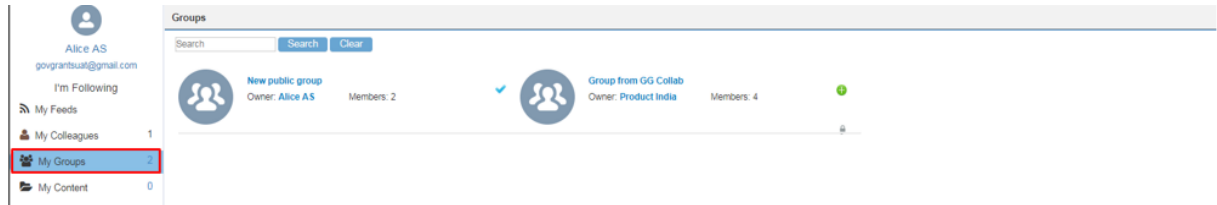
Once you started following the person and at a point you feel to unfollow, then click on '✓' icon.



**Figure 2673: Unfollow Colleague**

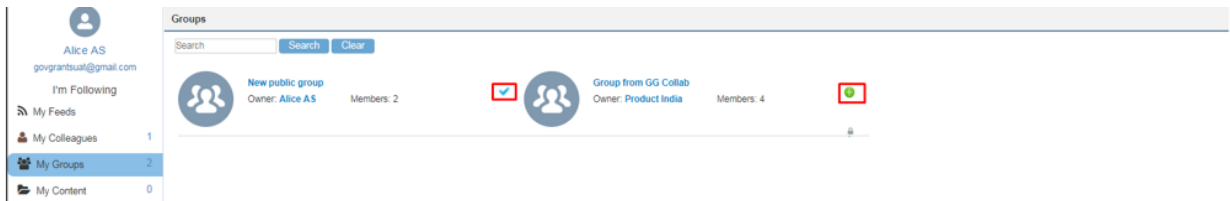
## 12.3 MY GROUPS

All available group details are shown here. This will include member and non-member groups too. You can search for the group using the search field. All group details will be shown with their owner name and number of members.



**Figure 2774: My Groups**

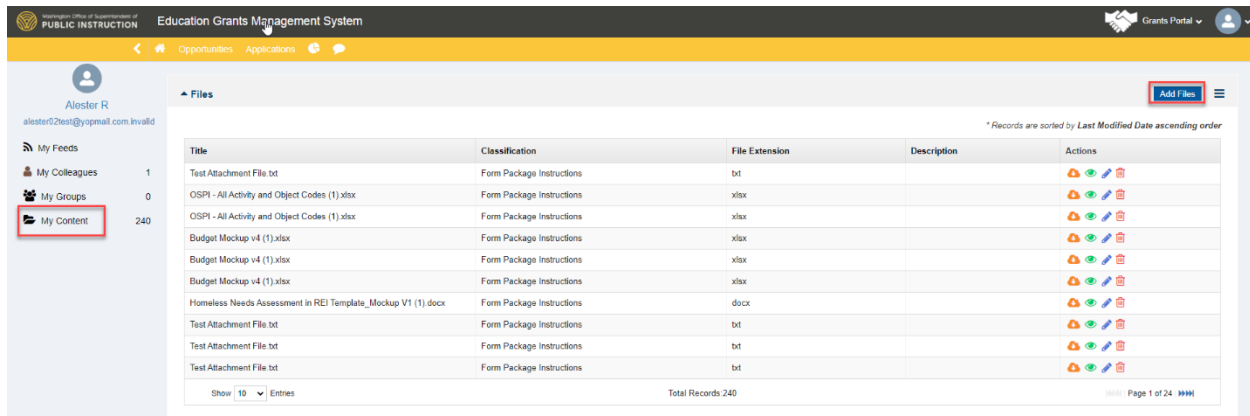
To join the group, click on the '+' icon in front of the contact person name. Once you have joined the group and whenever you feel to leave the group, then click on '✓' icon.



**Figure 2875: Join/Leave group**

## 12.4 MY CONTENT

Users can upload their content. To add new content, click on **Add Files** button.



**Figure 2976: My Content**

To upload the File, click on **Choose a File or Drag** it here then click on **Upload** button on the pop-up window and browse the File.

**Add File**

\* Upload File

1

Choose a File OR Drag it here

TEST.docx

Upload single file up to 2 GB

Description

2

Upload Cancel

**Figure 3077: Upload New File**