Application Processing

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PCCD Egrants Application Processing
Quick Start Guide

An Application is created in response to an open Funding Announcement and is the way an agency applies for a grant from PCCD.

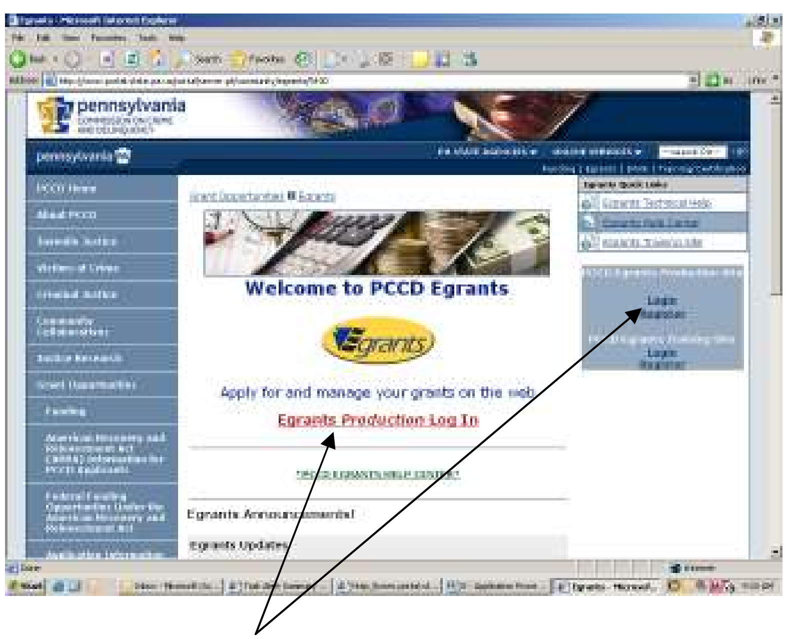
You will need to register as a user prior to entering an application for the first time. A separate Quick Start Guide entitled "PCCD Egrants Online Registration Quick Start Guide" is available to assist you with the registration process. Note: The procedure below assumes you are already registered.

Where to start:

If you have not yet begun to create an application for the Funding Announcement that you are applying for, follow steps #1 through #4 on pages 3 through 4 of this Quick Start Guide, skip step #5 on page 5 and then continue, beginning with step #6 on page 6.

If you previously began an application for this Funding Announcement, logged out and are now returning to work on the application again and you have your Grant ID number, follow steps #1 through #5 on pages 3 through 5, skip steps #6 through #9 on pages 6 and 7 and begin again at step #10 or greater on page 7 or greater, depending on where you were when you previously logged out of Egrants.

1. Go to the Egrants website at www.pccdegrants.state.pa.us. A screen entitled "Welcome to PCCD Egrants" appears.



2. Click on the Production "Login" link in the middle or on the right side of your screen.

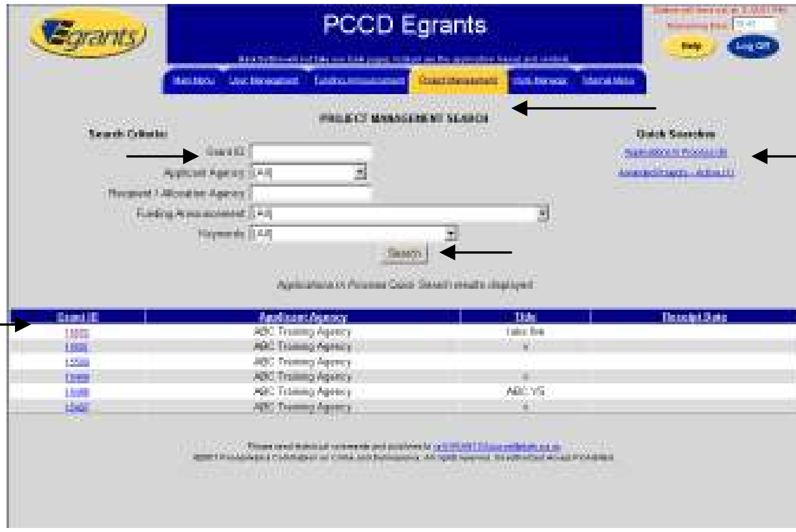
3. A screen entitled "<u>Site Access</u>" appears. Enter your "<u>User ID</u>" and "<u>Password</u>" that you selected when you "registered" and click on the "<u>Login</u>" button.

4. A "Welcome" screen appears.

5.a. If you are accessing <u>an existing grant project</u> (application, continuation or modification) or creating or updating reports such as a periodic program report or a quarterly financial report, select and click on the first hyperlink, as instructed and go on to step # 6.

/o5.b. If you are creating a <u>new application</u>, in response to a funding announcement, select and click on the second hyperlink, skip step #6 and begin again at step #7.

5. You will be transferred to the “Project Management Search” screen.



5.a. The “Project Management Search” screen appears.
5.b. Enter the “Grant ID” number and click on “Search.”
5.c. Select your “Grant ID” hyperlink at the bottom of the screen to take you to the “Project Summary” screen.

Note “Quick Searches” links are available in top right corner and can be clicked on to access applications in process as well as awarded projects.

Tip: When clicking on the Search button, Grants appear at the bottom of the page, by default, in descending order based on the Grant ID #. This allows you to see the most current Grants first. You can, however, click on the column headers to change the order of the search results.

5.d. Note the area that displays a grid and lists ALL of the phases of an application.
5.e. In order to better identify which phase and/or project are current, symbols are used. An “*” appears next to the current phase and a “P” appears next to the current project.
5.f. Quick Links in the body of the screen will take you directly to:

- Enter/update/view Fiscal or Program reports.
- Maintain Audit Plan.
- Review financial information.

Note: Phase 1 is the Application; Phase 2 is the continuation, etc.

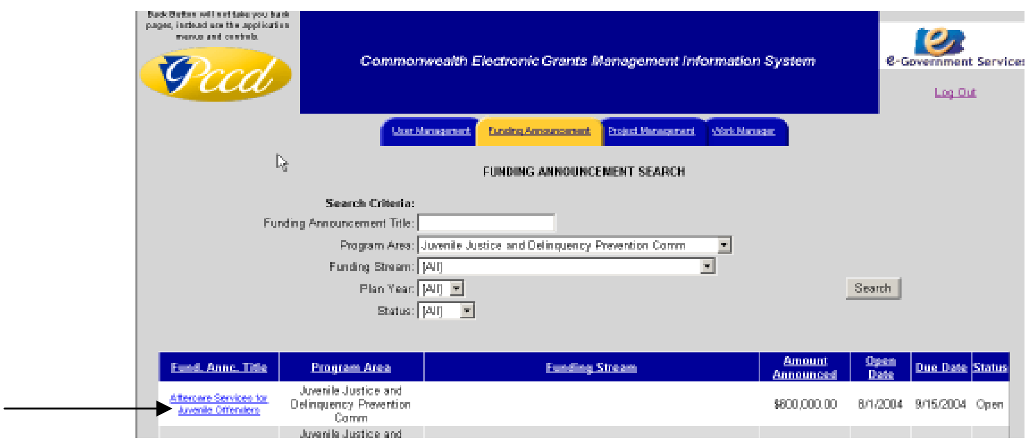
Also note: A “Project” can be an application, a continuation, or a modification. If a modification is submitted and approved against the application, the modification becomes the current project for the application phase. This is also true if a modification is submitted and approved for a continuation.

5.g. Click on the “Application” hyperlink. You will be redirected to the “Application Summary” screen. (See step #10 and beyond.)

6. The “Funding Announcement Search” screen appears.

7. Select from one of the categories provided under “Search Criteria” by entering a small amount of data in a field and click on the “Search” button.

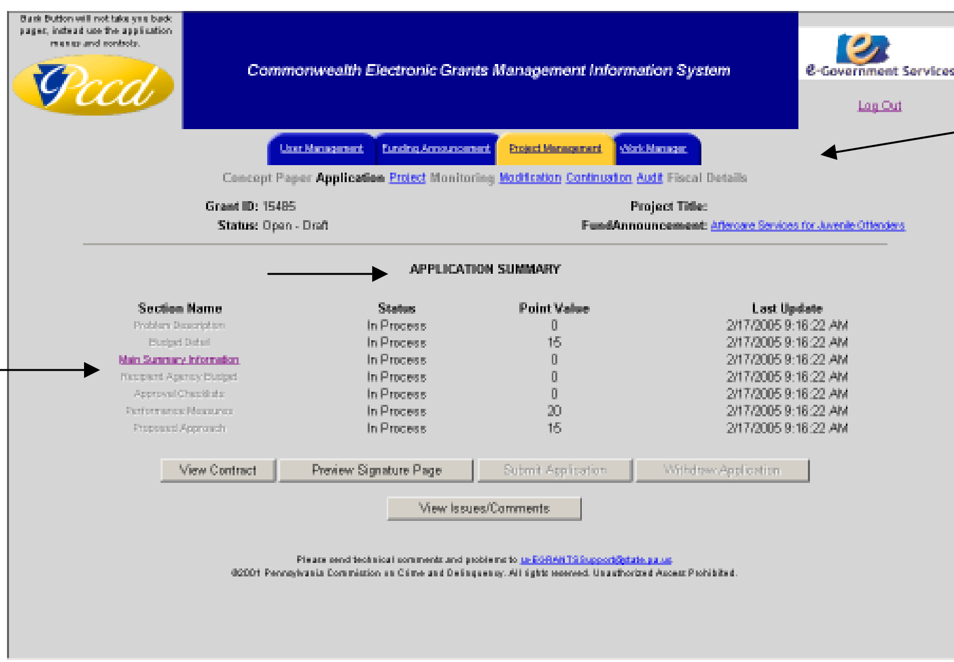
8. Select the “Funding Announcement Title” hyperlink that appears at the bottom of the screen.



9. A “Funding Announcement Summary” screen appears. Click on the “Create New Application” button.

If you have security access to create grants for more than one agency, select an “Applicant Agency” from the dropdown menu.

10. The “Application Summary” screen appears.



Note: This screen provides all the details of the Application. Only the “Main Summary Information” section is available at this point. When this section is completed and saved, the other sections will be enabled.

11. Select the "Main Summary Information." (Screen shot on next page.)

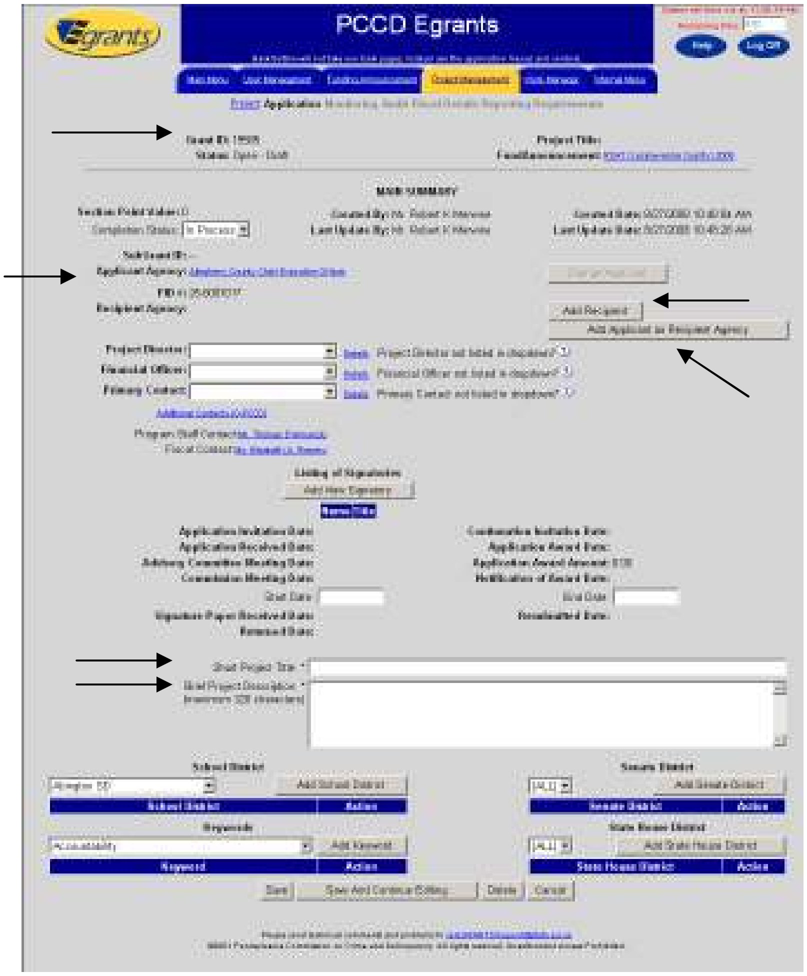
Main Summary Information:

1. The "Main Summary" screen appears.
   This is similar to page one of the current paper applications.

Note the system has assigned a Grant ID number to your application. It is important that you record this number so that if you log out of the system and return later to add more to the application you will pull up the application you previously began. Failure to enter the Grant ID number will result in another application being started for you with a new Grant ID number.

Note that the "Applicant Agency" is automatically added when you clicked on the "Submit Response" button.

Review, edit or add the "Short Project Title" and the "Brief Project Description" found toward the bottom of the screen. NOTE: There is a 320-character limit.



Add Recipient:
Note: If you as Applicant are the Recipient Agency, click on the Add Applicant as Recipient Agency button and the system will automatically add your information as Recipient Agency. Otherwise:

1. Click on the "Add Recipient" button. The "Recipient Search" screen appears.

2. Enter a portion of the recipient's name in the box marked "Recipient Agency Name."

3. Click on the "Search" button. A list of previously entered recipients' names will appear. Carefully read the entire name to be certain the correct name is selected.

4. If the recipient was previously entered, select the recipient by clicking on the hyperlink. "Recipient Agency Details" are displayed.

5. Scroll to the bottom of the screen and click on the "Save" button.

6. If the appropriate recipient is not found, click on the "Add New Recipient Agency" button at the bottom of the screen. The "Agencies Details" screen appears. Be certain to follow the "Standards for Data Entry."

7. Enter "Agency Details." At a minimum, fields with asterisks must be completed.

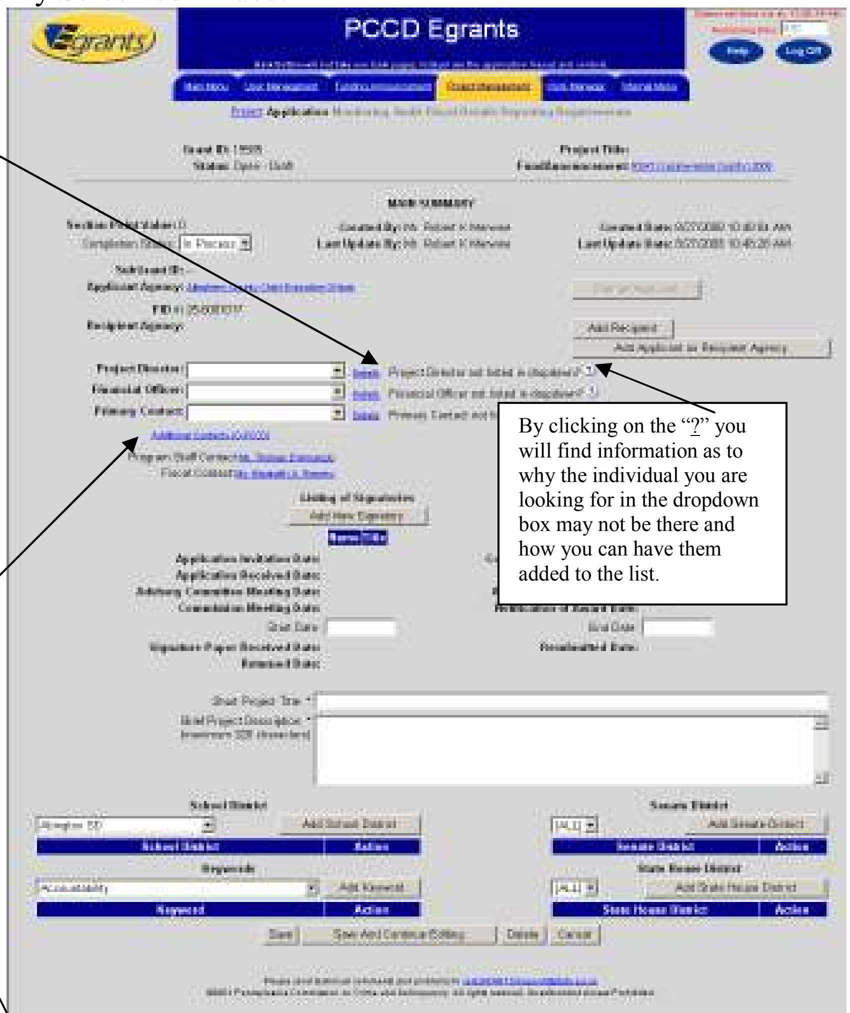
8. Click on "Add New Address," complete information, and select "Update" button.

9. Click on "Add Phone Number," complete information, and select a "Location" that *matches* the "Location" selected in the "Preferred Contact Method" in "Agency Details" and select "Update" button.

Note: It is necessary to match the location of the phone number with the preferred contact method if the preferred contact method is set to one of the telephone contacts.

10. Scroll to the bottom of the page and click on the "Save" button. You will be directed back to the "Main Summary" screen.

Main Summary Screen continued:



By clicking on "Details," you will be able to check specific information associated with the name you have selected in the dropdown box; such as individual's address, agency address, email, and phone number to confirm that you are selecting the correct individual.

In addition to the Program Staff Contact and Fiscal Staff Contact, you may view any additional PCCD Contacts that have been set up by clicking on "Additional Contacts." The following screen will appear. Click on the individual hyperlinks for detailed information concerning each additional contact.

By clicking on the "?" you will find information as to why the individual you are looking for in the dropdown box may not be there and how you can have them added to the list.

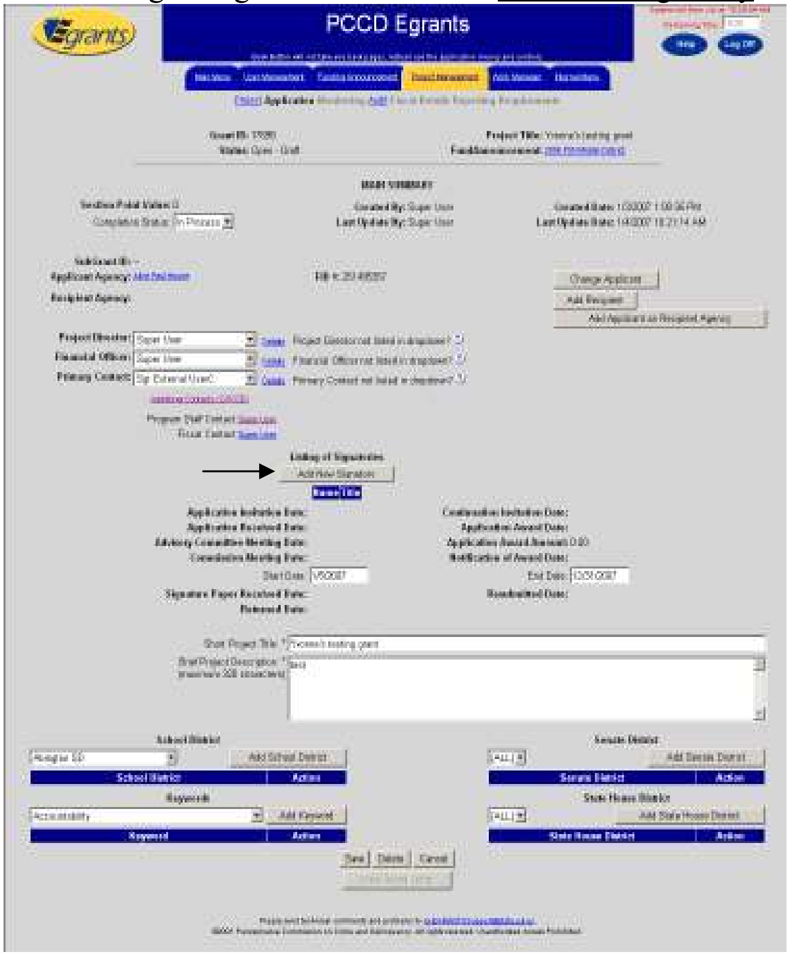
To select the Project Director, Financial Officer and Primary Contact, click on the dropdown arrow for each field.

Note: The Project Director, Financial Officer, and Primary Contact dropdown lists **only** contain the names of individuals who are *registered users* of the Egrants system and have security access to this grant.

- If the individual you wish to select does not appear in the dropdown list and is not a registered user, the individual must register with Egrants to obtain a user id and password and then obtain appropriate security to the grant.
- If an individual is already a registered user but does not appear in the list, they only need to obtain security access to the grant to appear in the list. They do NOT need to re-register.

Also Note: Egrants requires that the Project Director, Financial Officer and the Primary Contact be at least **two** different individuals. The Project Director can also be the Primary Contact or the Financial Officer can also be the Primary Contact, however, the Project Director and Financial Officer cannot be the same person.

2. Under the title “Listing of Signatories” click on “Add New Signatory.”



You will be transferred to the “Signatory Search” screen.

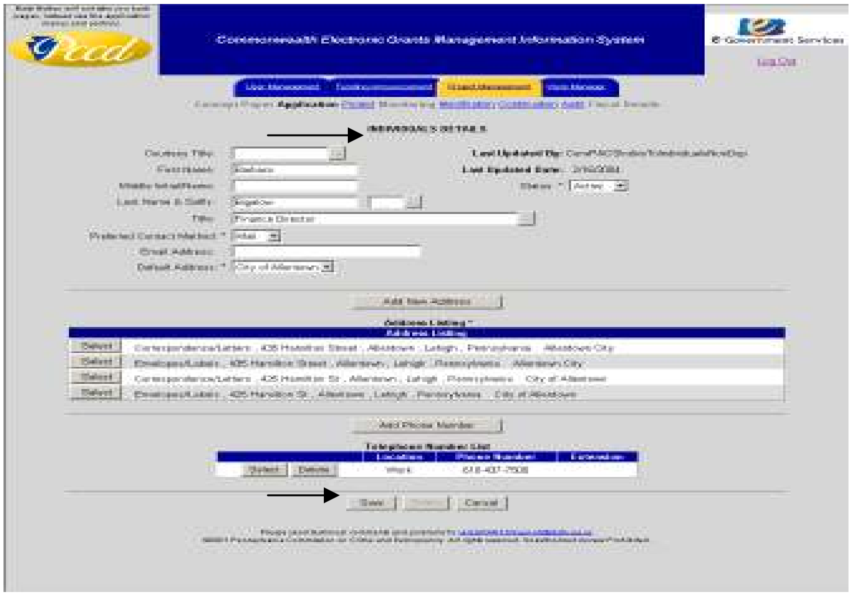
Enter the “Search Criteria” for the person you want to add and click on the “Search” button.

A list of names will appear at the bottom of the screen.

Select the hyperlink for the name of the person you want to add as signatory.

Note: More than one name may be added. (Example – you may list three County Commissioner Names.)

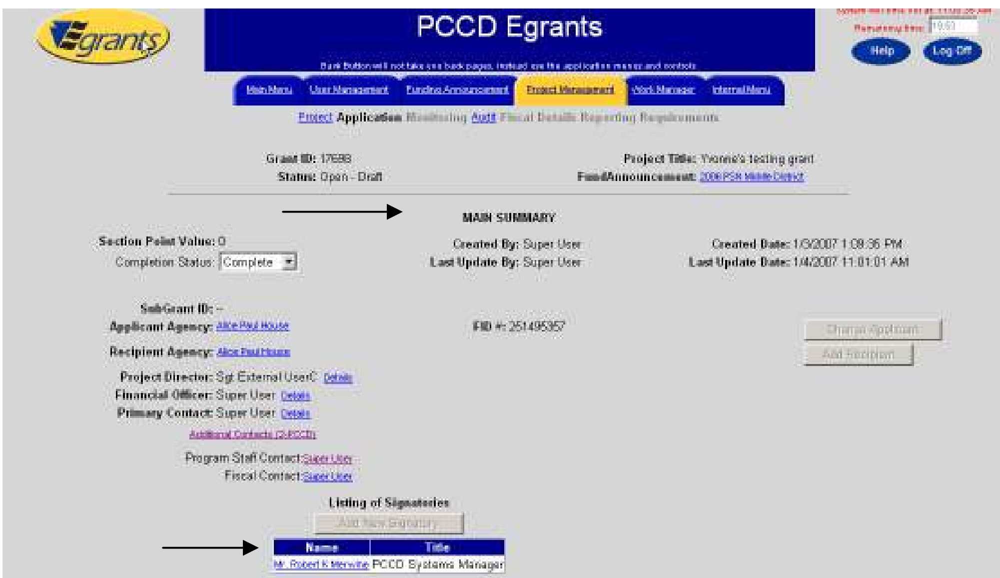
Individuals Details Screen:



Signatory Search continued:

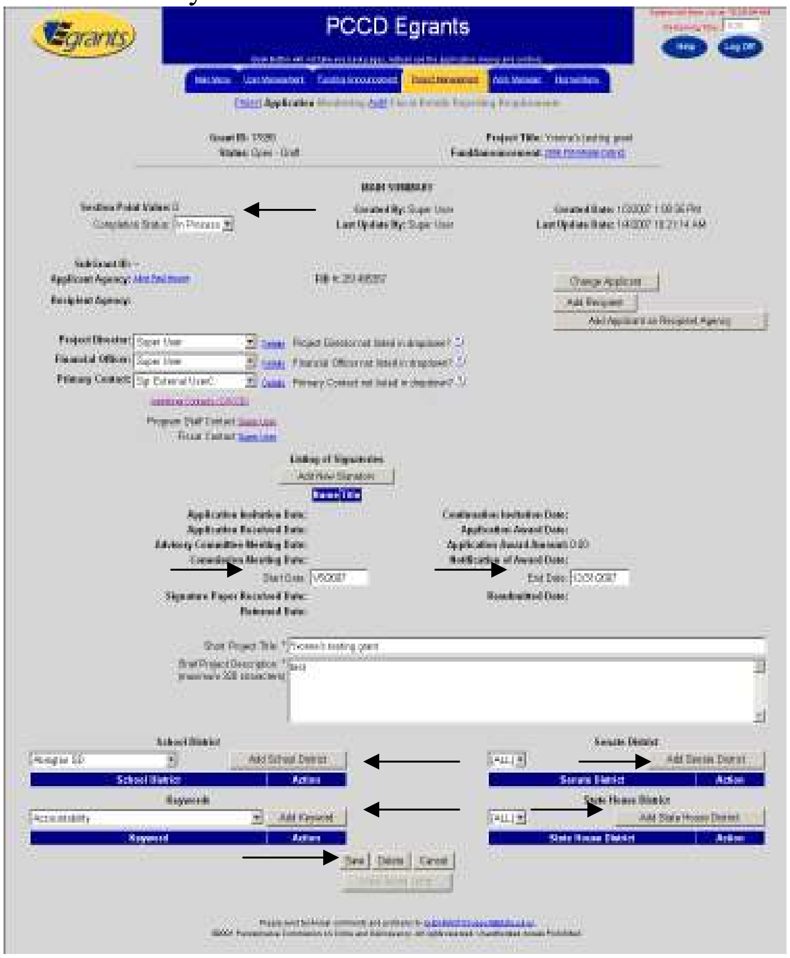
You will be transferred to the "Individuals Details" screen. Confirm this is the correct person and click on the "Save" button.

You will be transferred to the "Main Summary" screen. The person you selected will now be listed in a grid as a signatory.



Signatories are the people who have the authority to sign the paper application for submission to PCCD. Note: The signature page is still submitted in hardcopy to PCCD.

Main Summary Screen continued:



Enter the “<u>Start Date</u>.” This is the beginning of the project period.

Enter the “<u>End Date</u>.” This is when funding ends.

If instructed in the funding announcement, enter “<u>Keywords</u>” to enhance future search capabilities. Please leave blank if no instructions are given in the funding announcement.

Please enter the “<u>Senate District</u>” associated with the application.

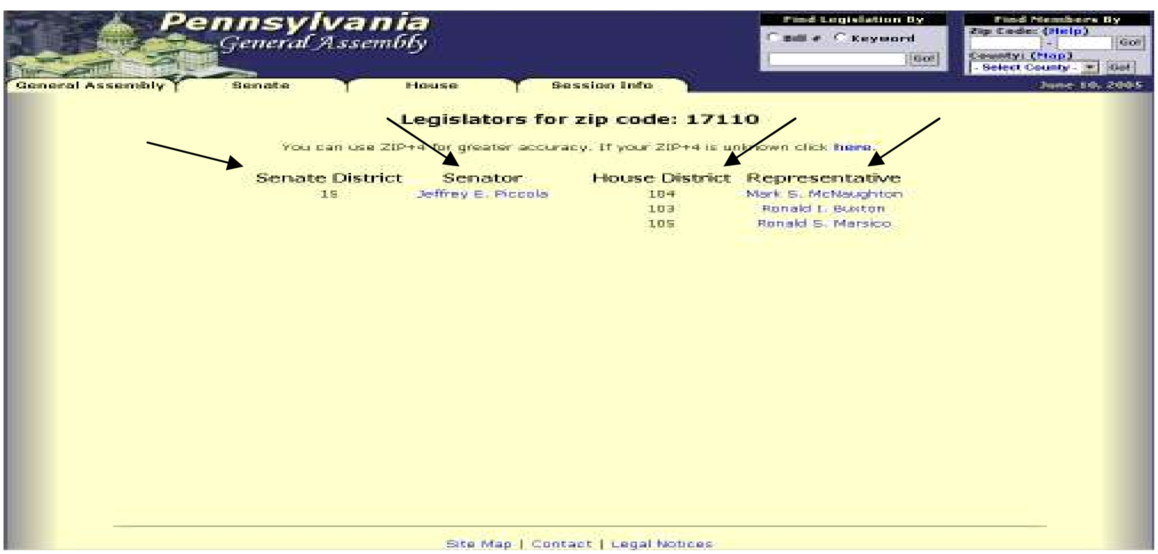
Please enter the “<u>House District</u>” associated with the application.

Scroll toward the bottom of the screen. Select the “<u>School District</u>” associated with the application, if applicable and click on “<u>Add School District</u>.” Additional school districts can be added, if appropriate, by following the same process.

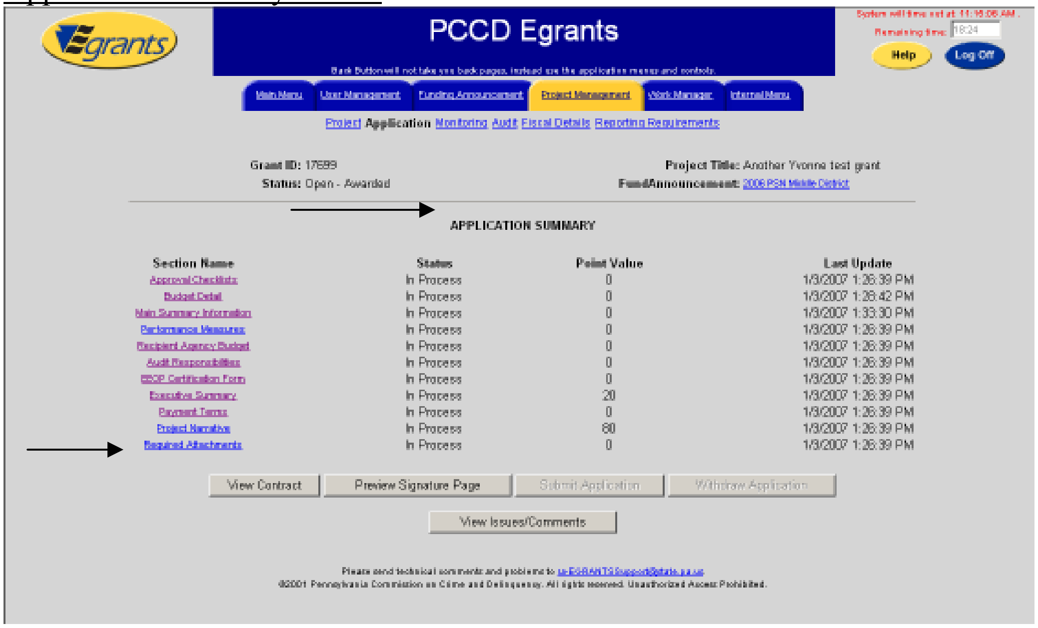
Scroll to the top of the screen and change the “<u>Completion Status</u>” of this section to “Complete.”

Click on the “<u>Save</u>” button. You will return to the “<u>Application Summary</u> “page. The balance of the sections is now enabled.

For help in identifying the Senate and House District, go to www.legis.state.pa.us. At the top right of the screen, there is a box called "Find Members By." Enter either the zip code or select the county. You will be provided with a Senate District, the name of the Senator, the House District and the name of the Representative.



Application Summary Screen:

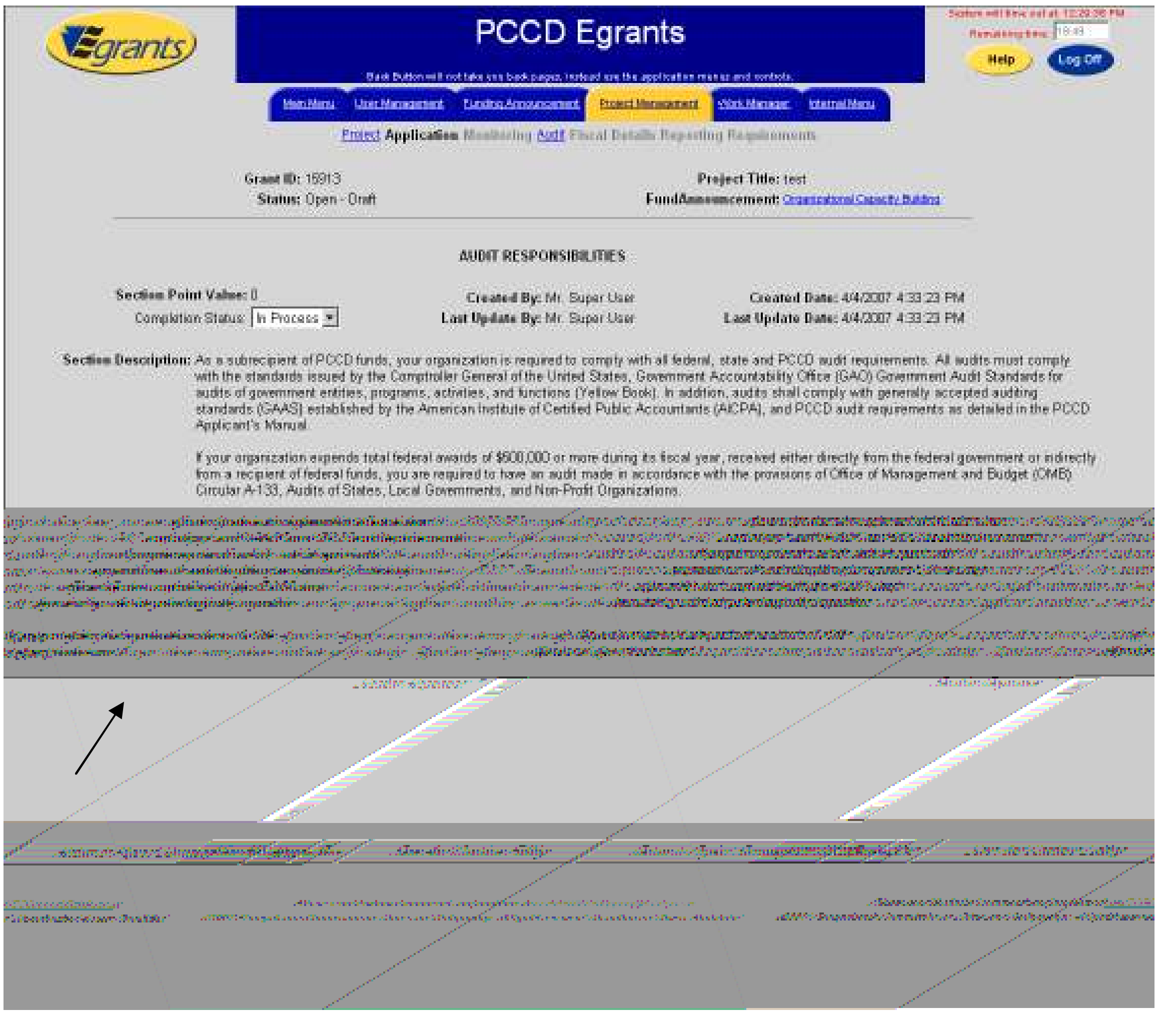


Note: Additional sections are enabled based on the Funding Announcement attached to your grant application. Select each hyperlink, complete the requested information, and change the status to "Complete" and click on the "Save" button, which takes you back to the "Application Summary" screen.

Below are examples of the various sections:

1. <u>Payment Terms</u> – After clicking on the “Payment Terms” hyperlink on the Application Summary screen, you are taken to the “Payment Terms” screen. Read the information. Respond appropriately by entering either “Applicant accepts these terms” or “Applicant does not accept these terms” in the response block.

2. Audit Responsibilities - After clicking on the “Audit Responsibilities” hyperlink on the Application Summary screen, you are taken to the “Audit Responsibilities” screen. Read the information. Respond appropriately by entering either “Applicant accepts these terms” or “Applicant does not accept these terms” in the response block.

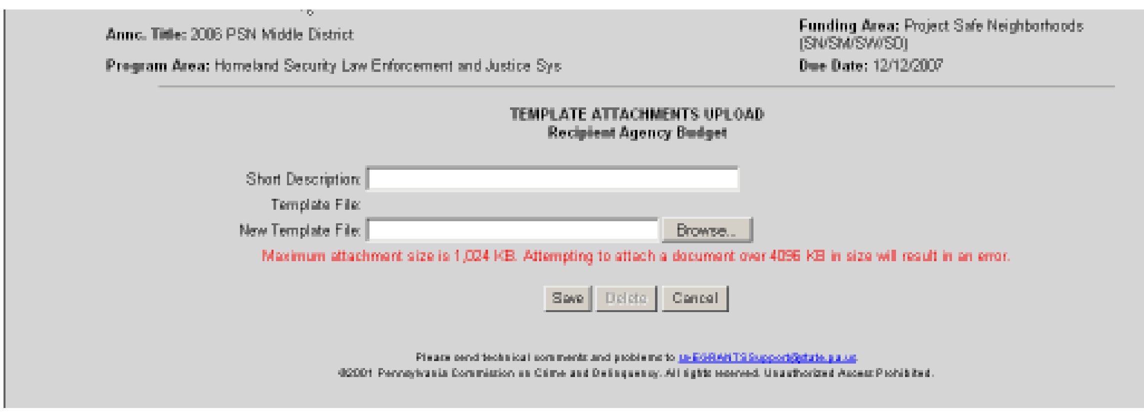


3. Required Attachments placeholder

To insert a "Requested Attachment:" Click on the "Required Attachments" section of the "Application Summary" screen. The "Required Attachments" screen appears. Attach requested documents or open templates, complete and "Save."

To utilize a template, "click" the hyperlink and save the template to your hard drive. When you have completed the template, follow the instructions below to attach the requested attachment.

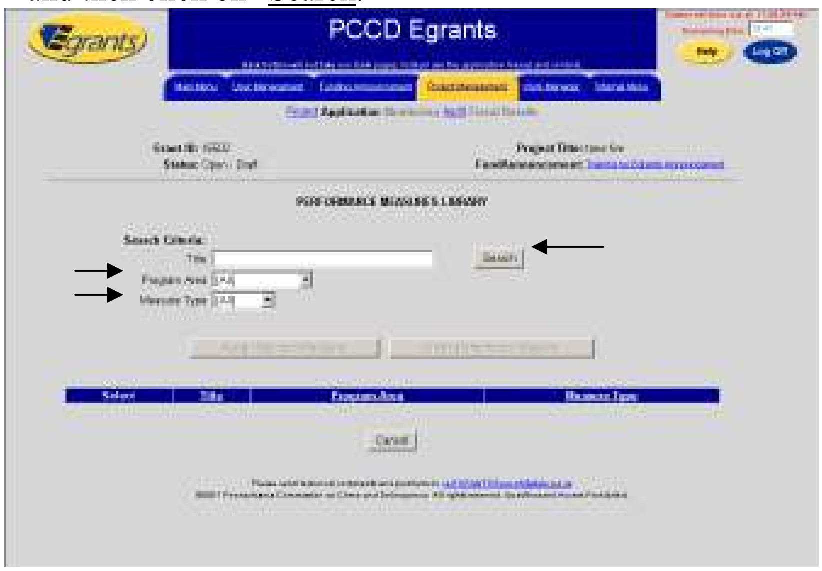
To attach a "Requested Attachment," click on "Browse" to locate the document from your PC. When you find the file, select it and click on the "Open" button. The file name will appear in the field. Click on "Save."



5. Approval Checklist – After clicking on the "Approval Checklist" hyperlink on the Application Summary screen, you are taken to the "Approval Checklist" screen. Read the information. Select "yes" or "no" for a series of questions. (Similar to page 9 of the current paper application.)

6. Performance Measures – After clicking on the "Performance Measures" hyperlink on the Application Summary screen, you are taken to the "Performance Measures" screen where all the performance measures assigned to this funding announcement are displayed. Read the information. You can add additional performance measures by clicking on the "Add New" button, which takes you to a "Performance Measure Library" where you can select additional performance measures.

a. Select from the "<u>Program Area</u>" and "<u>Measure Type</u>" dropdown menus and then click on "<u>Search</u>."

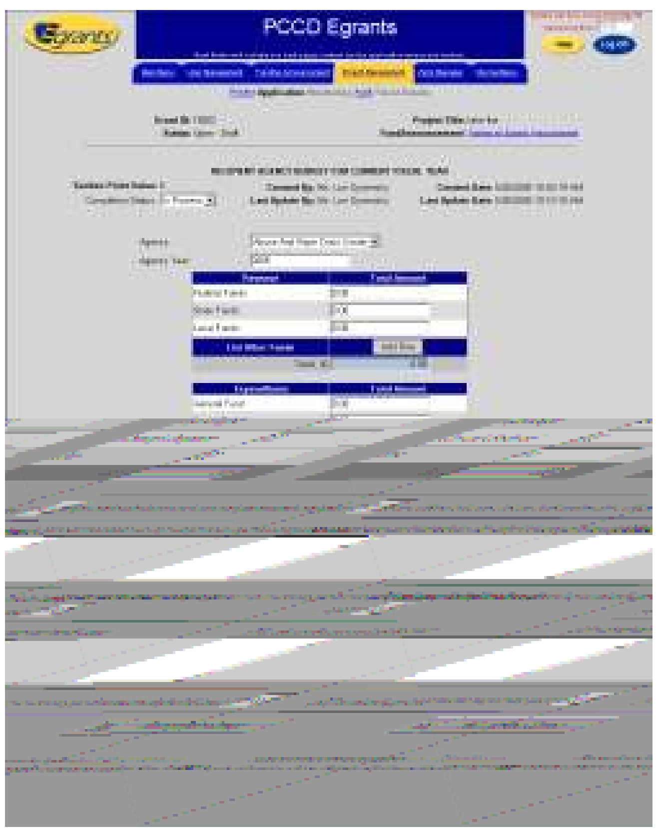


b. Select from available performance measures by clicking on the boxes in front of preferred measurements. When finished, click on the "<u>Assign Selected Measures</u>" located above the list of approved measures.

c. If there is no performance measure that meets your need, click on the "<u>Create Performance Measure</u>" button. You will be taken to the "<u>Performance Measure Details</u>" screen where you can create a performance measure.

d. When you are finish creating performance measures, click on the "Save" button.

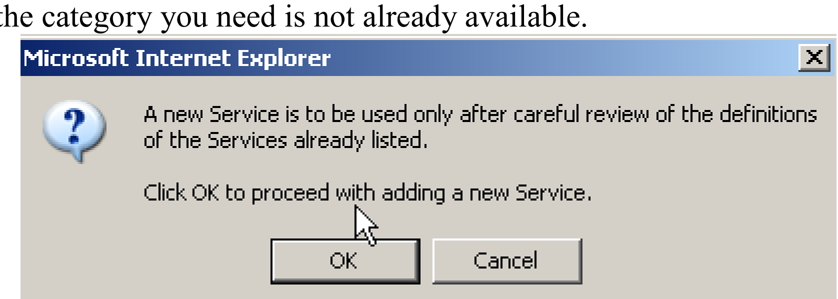
7. Recipient Agency Budget – After clicking on the "Recipient Agency Budget" hyperlink on the Application Summary screen, you are taken to the "Recipient Agency Budget" screen where you will enter your total budget from all funding sources for the current fiscal year. (Similar to page 10 of the current paper application.)



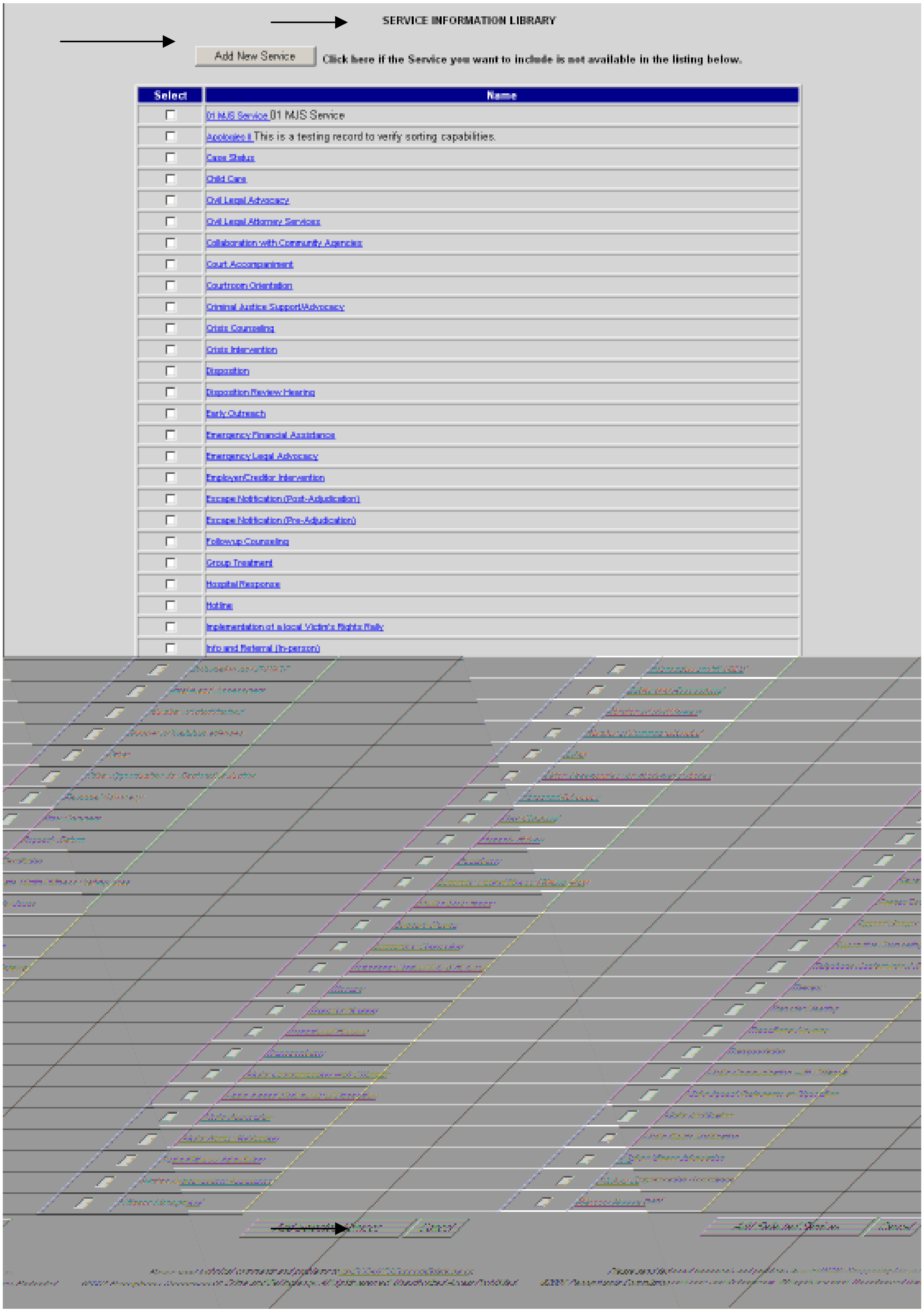
8. Service Information – If "Service Information" appears under "Section Name" on the "Application Summary" screen, click on the hyperlink and follow the steps below:

Complete the Target, Position and Supervisor information for each appropriate Service. Begin by entering the Target.

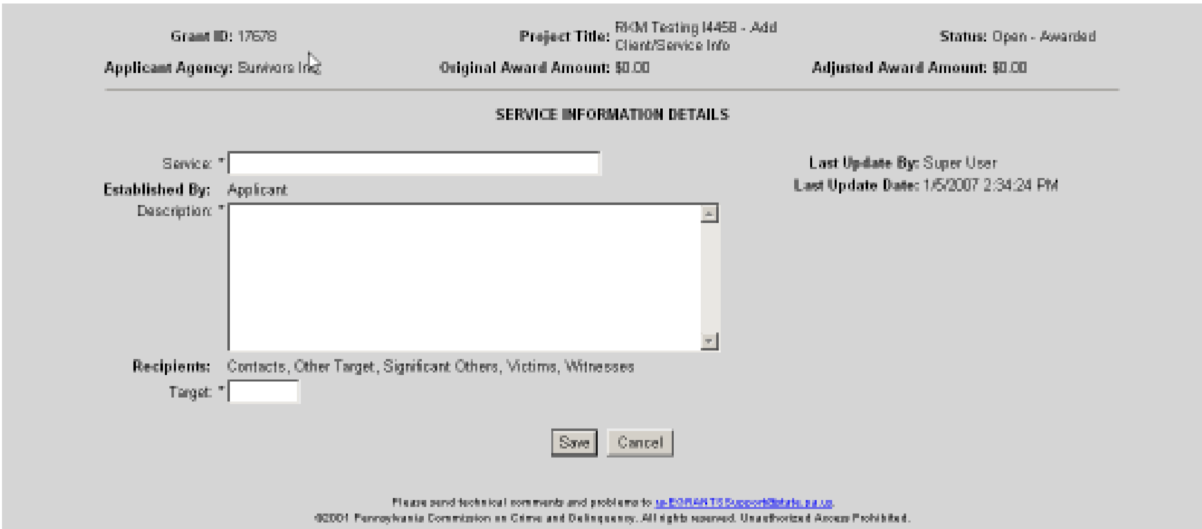
External users also have the ability to "add" service information in a similar manner as adding performance measures. Click on the "Add New Service" button on the "Service Information" screen shown above. The following prompt will appear. Click "OK" if you are certain the category you need is not already available.



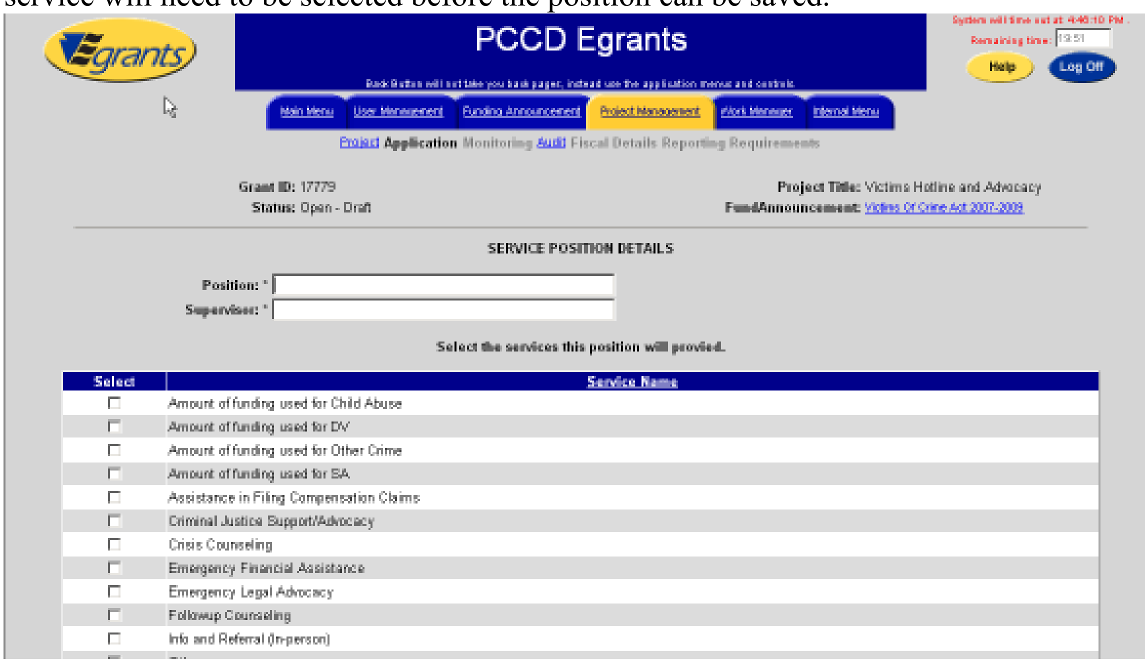
You will be transferred to the "Service Information Library" screen. (Screen shot is on following page.) Select from the services list by checking off the appropriate box(es) and then click on "Add Selected Services" at the bottom of the screen.


SERVICE INFORMATION LIBRARY
Add New Service
Click here if the Service you want to include is not available in the listing below.
Select
Name
01 MJS Service 01 MJS Service
Apologies ii This is a testing record to verify sorting capabilities.
Case Status
Child Care
Civil Legal Advocacy
Civil Legal Attorney Services
Collaboration with Community Agencies
Court Accompaniment
Courtroom Orientation
Criminal Justice Support/Advocacy
Crisis Counseling
Crisis Intervention
Disposition
Disposition Review Hearing
Early Outreach
Emergency Financial Assistance
Emergency Legal Advocacy
Employer/Creditor Intervention
Escape Notification (Post-Adjudication)
Escape Notification (Pre-Adjudication)
Followup Counseling
Group Treatment
Hospital Response
Hotline
Implementation of a local Victim's Rights Rally
Info and Referral (In-person)

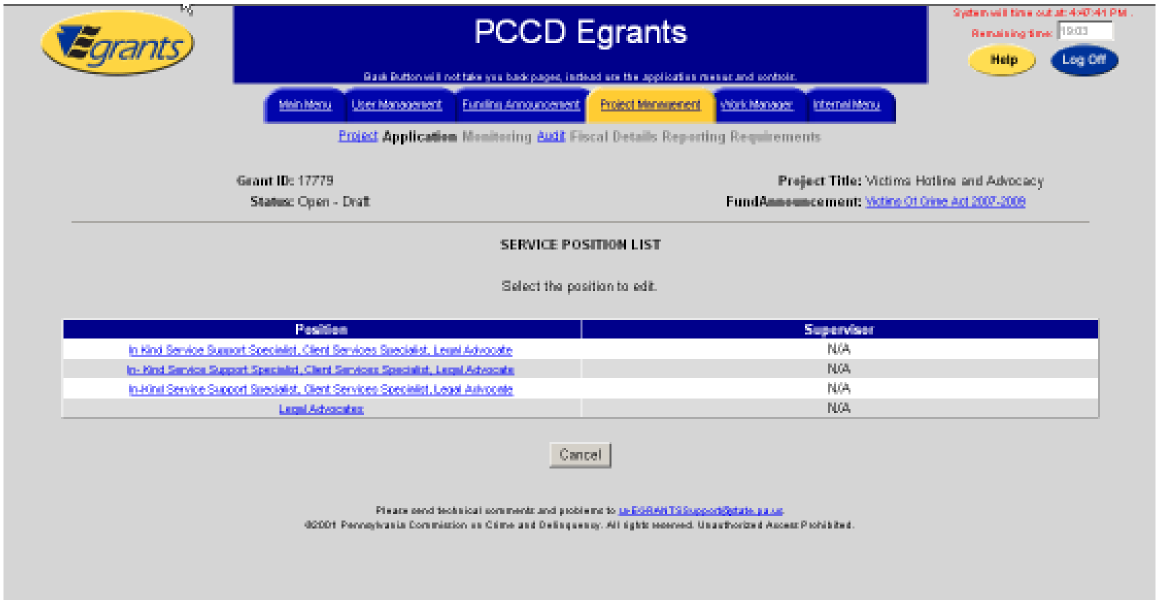
If you cannot find an appropriate service, click on the "Add New Service" button toward the top of the page. The "Service Information Details" screen will appear. Complete the required fields and click on "Save."



To add a new Service Position, click on the "Add New Position" button. The "Service Position Details" page appears. Position and Supervisor are required fields. At least one service will need to be selected before the position can be saved.

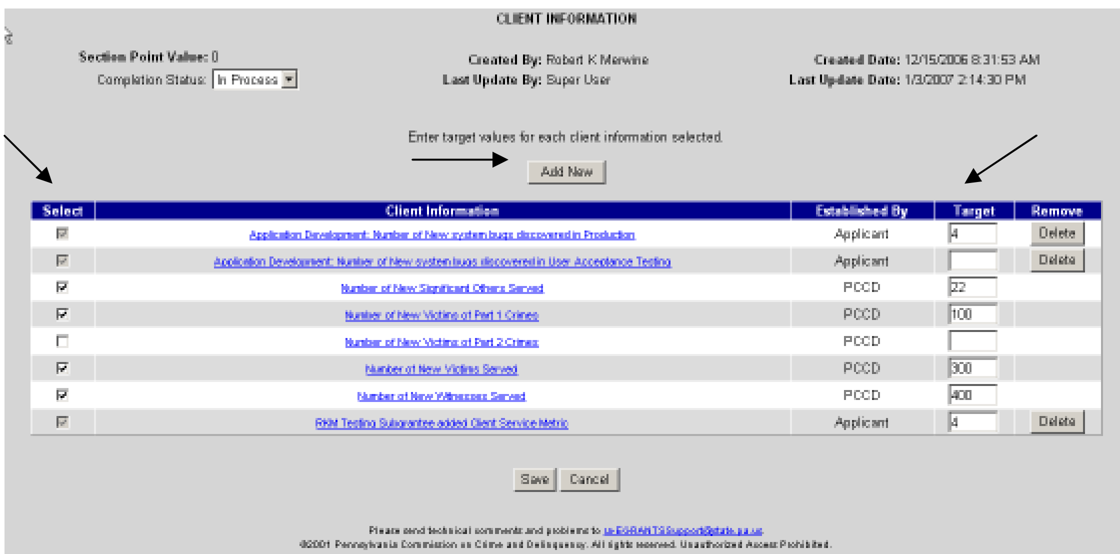


To edit a Service Position, click on the Edit position button. This will take you to the Service Position List page. Click on the hyperlink of the position you want to edit. You will be transferred back to the Service Position Details page (above) to edit the position.

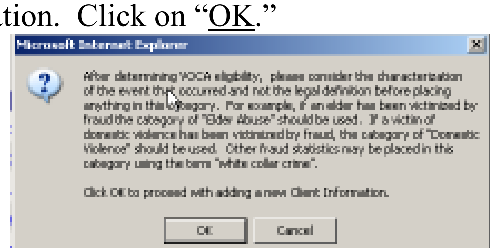


9. Client Information - if "Client Information " appears under "Section Name," click on the hyperlink and follow the steps below:

Select each appropriate "Client Information" item and enter the "Target" for each item selected. When finished, click on "Save."



If you choose to add additional Client Information, click on the "Add New" button toward the top of the screen. A pop-up will appear asking you to confirm you want to add a new Client Information. Click on "OK."



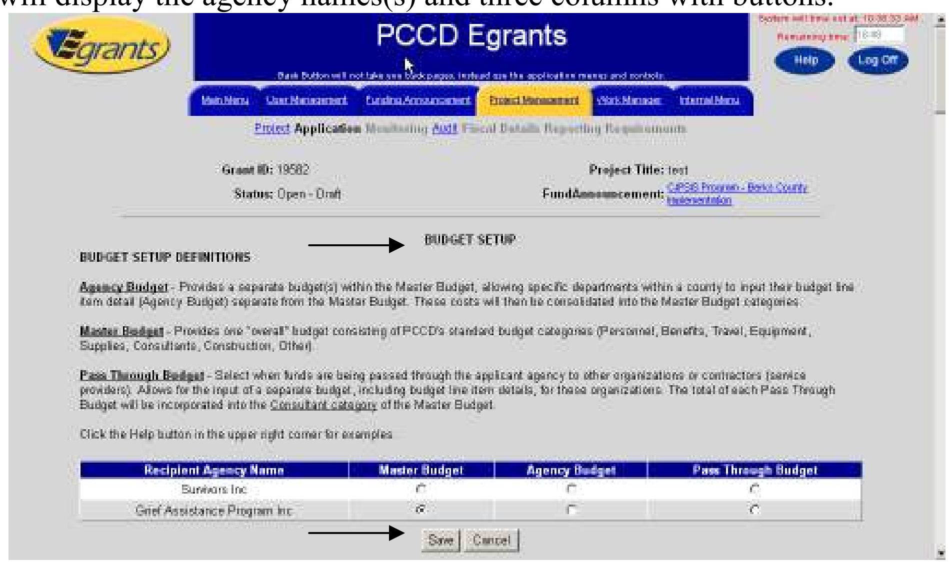
The “Client Information Library” will appear. Select from the “Client Information” items offered and click on “Save” (not shown) at the bottom of the screen. You will be transferred back to the “Client Information” screen.

If you cannot find the Client Service you want, click on “Add Client Service Metric.” You will be transferred to “Client Info Details.” Complete the required fields, click on “Save” and you will be returned to the “Client Information” screen.

Budget Setup:

1. Select "Budget Detail" hyperlink.

2. You will be transferred the initial time to the "Budget Setup" screen. This screen will display the agency names(s) and three columns with buttons.



Note: Be very careful when setting up the budget initially and selecting budget types, as it will affect how the budget is entered throughout the application.

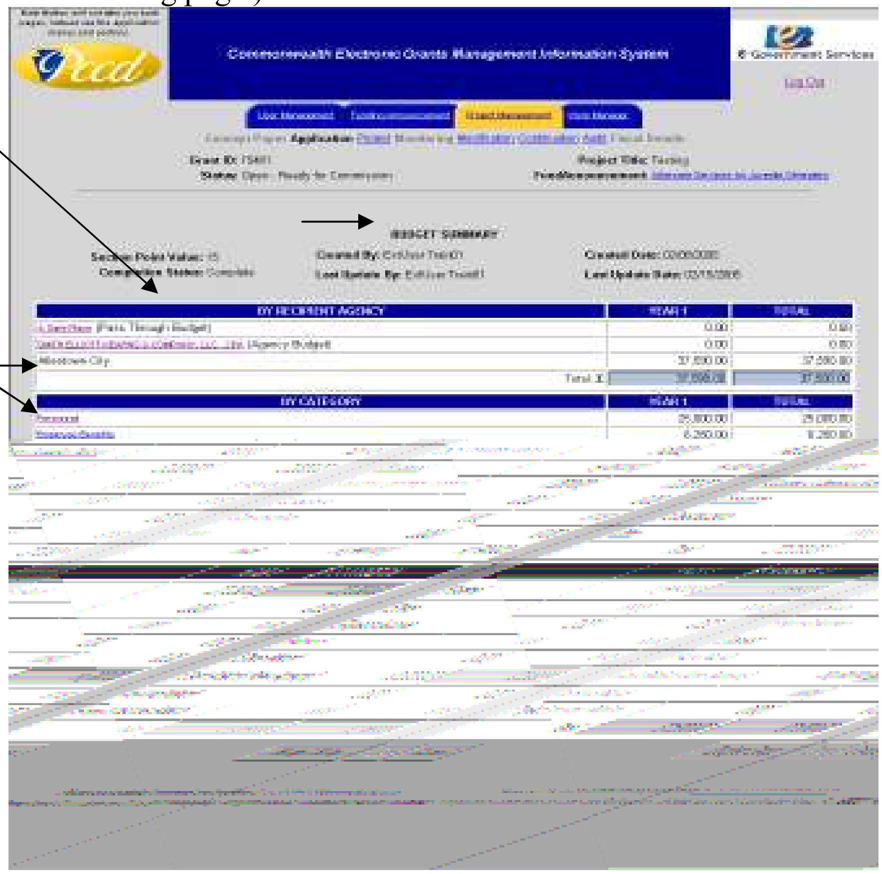
   a. Select "Master Budget" for the applicant agency.
   b. Select "Agency Budget" for a department with in the applicant agency in order for them to enter their own budget line item detail, which will consolidate at the applicant agency level.
   c. Select "Pass-Through Budget" when an agency agrees to serve as a pass-through to another agency. This allows the pass-through agency to enter their own budget line item detail, which is represented as a consolidated total in the Consultant category of the applicant agency's budget. Change the "Completion Status" of this section to "Complete."
   d. Click on the "Save" button. You will go to the "Budget Summary" screen.

3. On subsequent visits to the Budget Detail hyperlink, you will be transferred to the "Budget Summary" screen. The screen is divided into three sections. (See screenshot on the following page.)

"Recipient Agency" lists all agencies associated with the grant. Any pass-through agencies and departments within the applicant agency will be displayed as hyperlinks. Click on the hyperlinks to enter line item budget information for them.

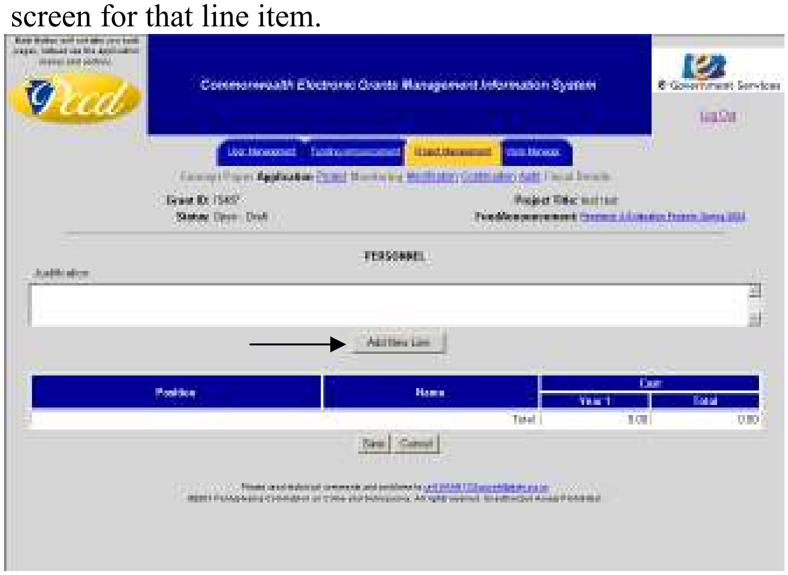
The applicant agency will not display as a hyperlink.

The applicant agency budget is entered in the second section called "By Category."



Note: You can no longer enter cents into the Egrants system. Budget Entries are rounded at the Line Item level. Only whole dollars are displayed.

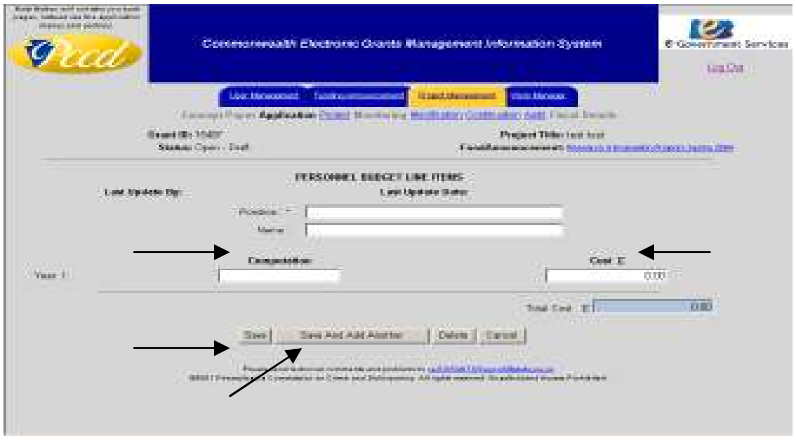
a. For each line item, click on the hyperlink and you will be transferred to a screen for that line item.



b. Click on the "Add New line" button.

c. You will be transferred to a screen where you will enter the "Computation" for the line item, as well as the total "Cost" of the computation. Example of a computation would be: 40 hours x $10. Example of total cost would be: $400.

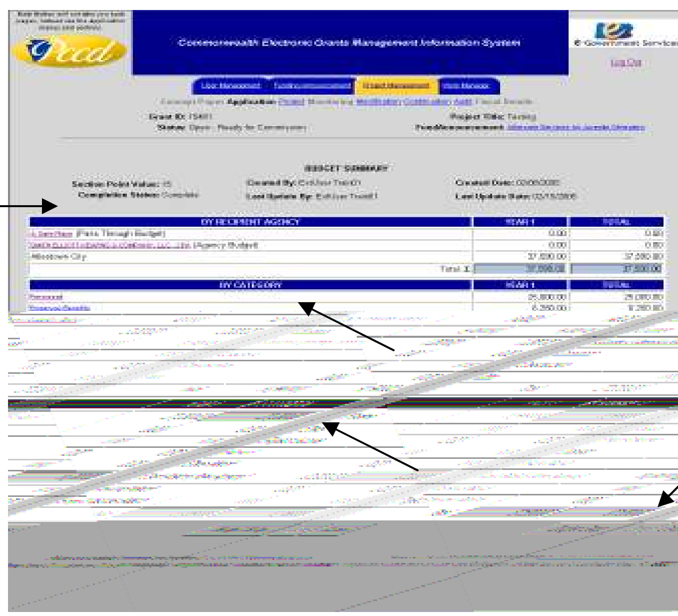
Note: in most instances you will need to compute the total cost and insert it.



Note: a minimum of $5000 of equipment can be entered; otherwise, it should be recorded as supplies.

d. Click on the "Save" button or the "Save and Add Another."

e. Enter the applicant agency budget information by clicking on the hyperlinks in the "By Category" section of the screen. As noted above, the pass through budget information will aggregate in the consultant line in this section.



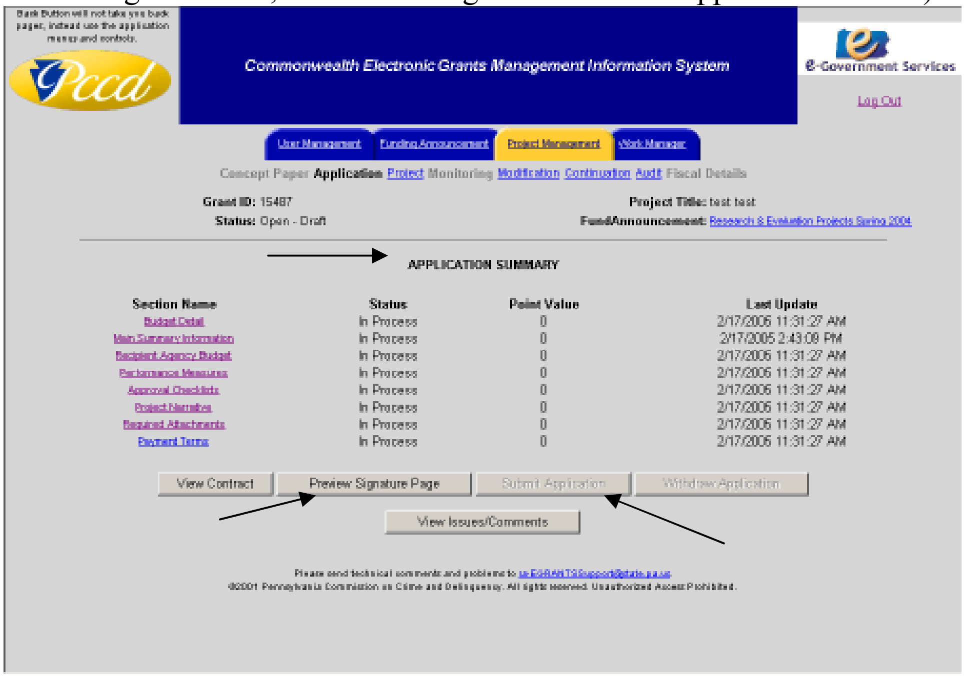
Note: All three categories must total to the same amount.

f. In the final section called "By Source," enter the various sources that you will utilize to support the project identified in the grant application.

g. Change the "Completion Status" of this section to "Complete."

h. Click on "Save" button at bottom of the screen to go back to the "Application Summary" screen to select additional sections to complete.

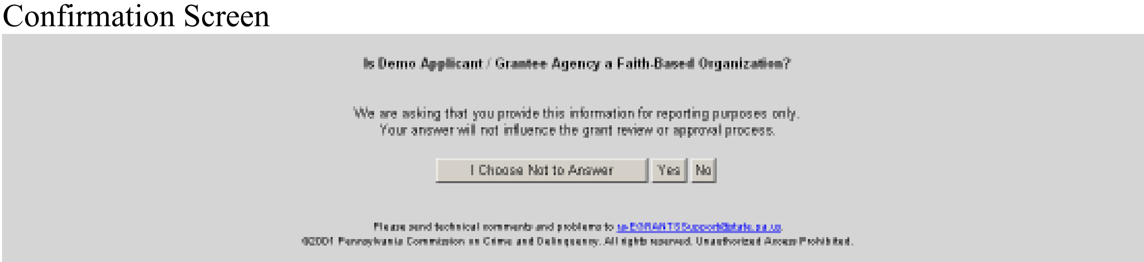
Note: When you have completed all the sections and have marked the status of each complete, you can select the "Submit Application" button at the bottom of the "Application Summary" screen. (Please note the information below concerning Faith Based Organizations, before clicking on the Submit Application button.)

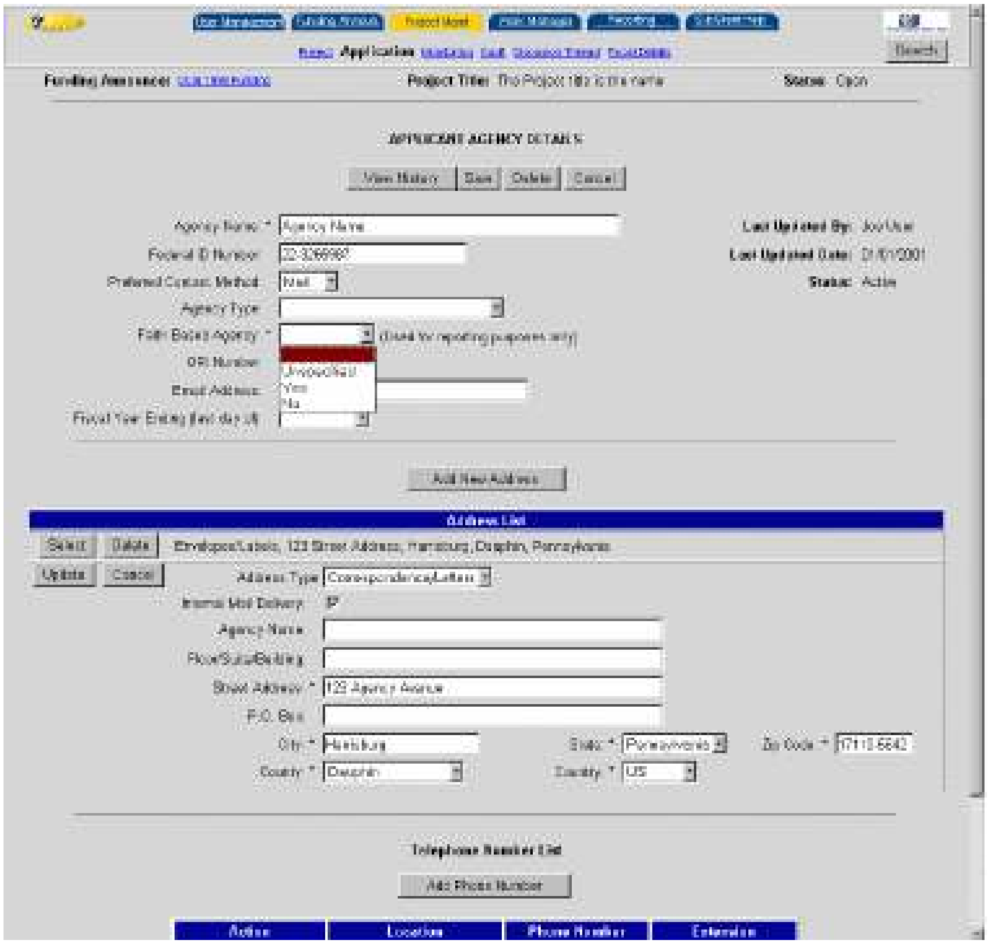


Faith Based Organization Question

Note: PCCD now asks every Applicant, Recipient and Allocation Agency to provide information for reporting purposes only regarding Faith Based Agencies. If you as an Agency have not previously supplied responded either "Yes" or "No" to the question displayed on the Confirmation Screen below, you will be required to select one of the three values before submitting your Application.

Confirmation Screen

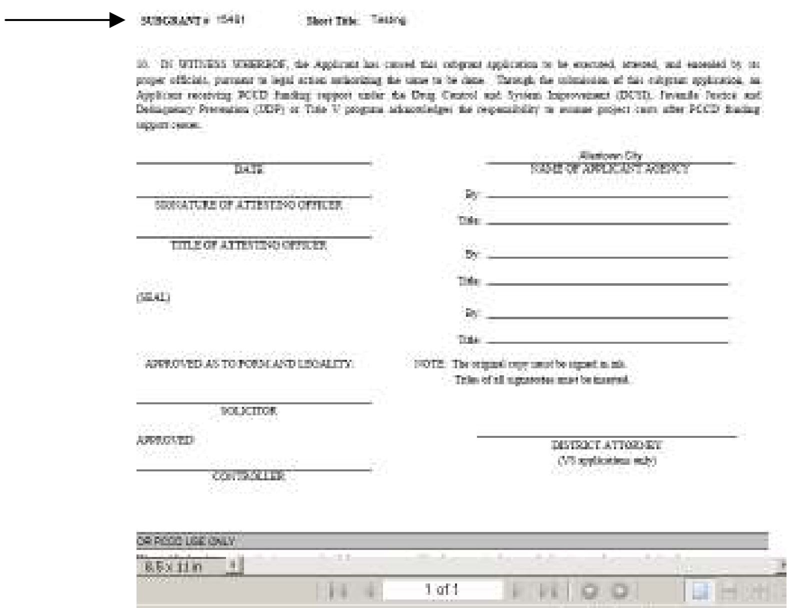




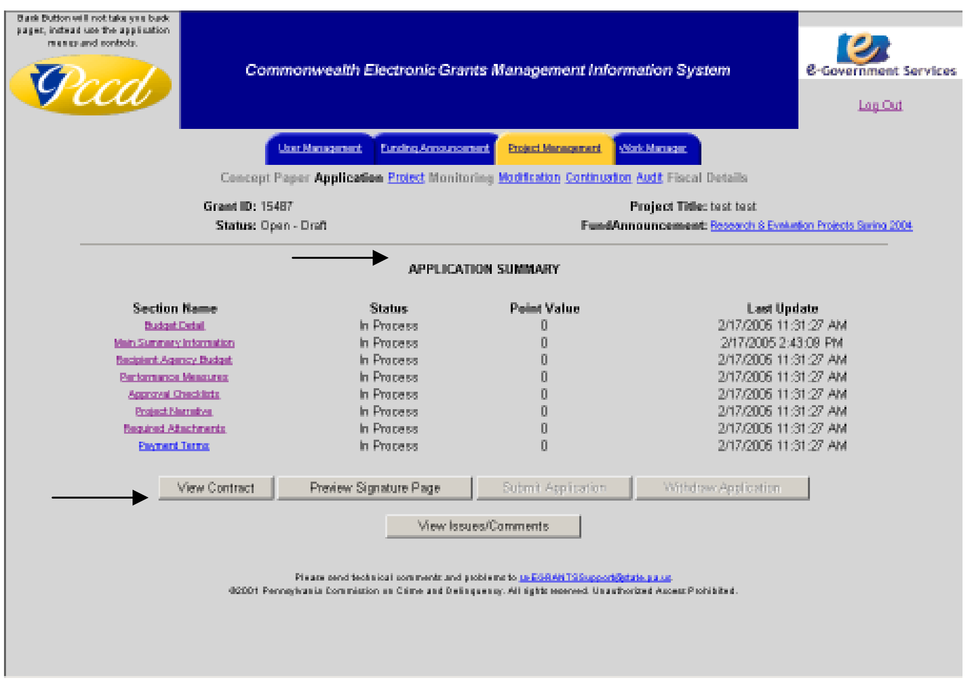
Once you have submitted the application you cannot make changes to it unless it is sent back to you by PCCD for correction.

Your agency is still required to submit a hardcopy of the signatory page to PCCD. On the Application Summary screen, click on the "Preview Signature Page" button and you will be transferred to a PDF document that you can print out, obtain the required signatures, and send to PCCD.

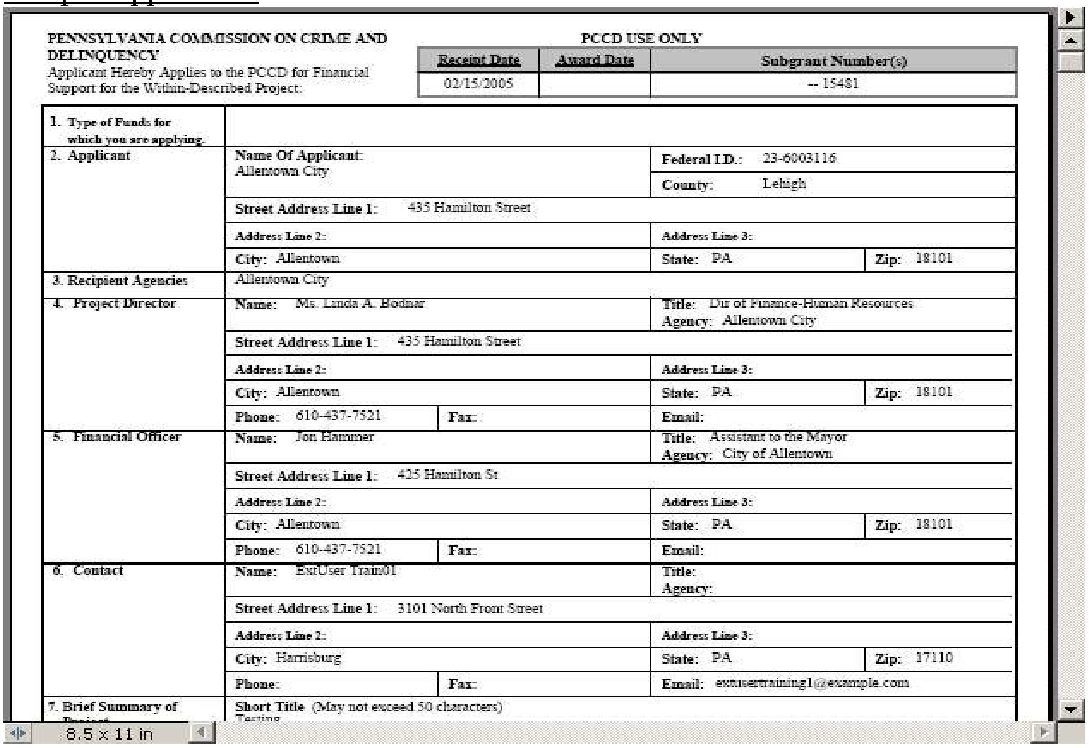
Note: the Grant ID number and the title of your project will be noted at the top of the Signature page.



A complete copy of your application can be viewed or printed by clicking on the "View Contract" button at the bottom of the "Application Summary" screen.



Sample Application:



PENNSYLVANIA COMMISSION ON CRIME AND DELINQUENCY
Applicant Hereby Applies to the PCCD for Financial Support for the Within-Described Project:

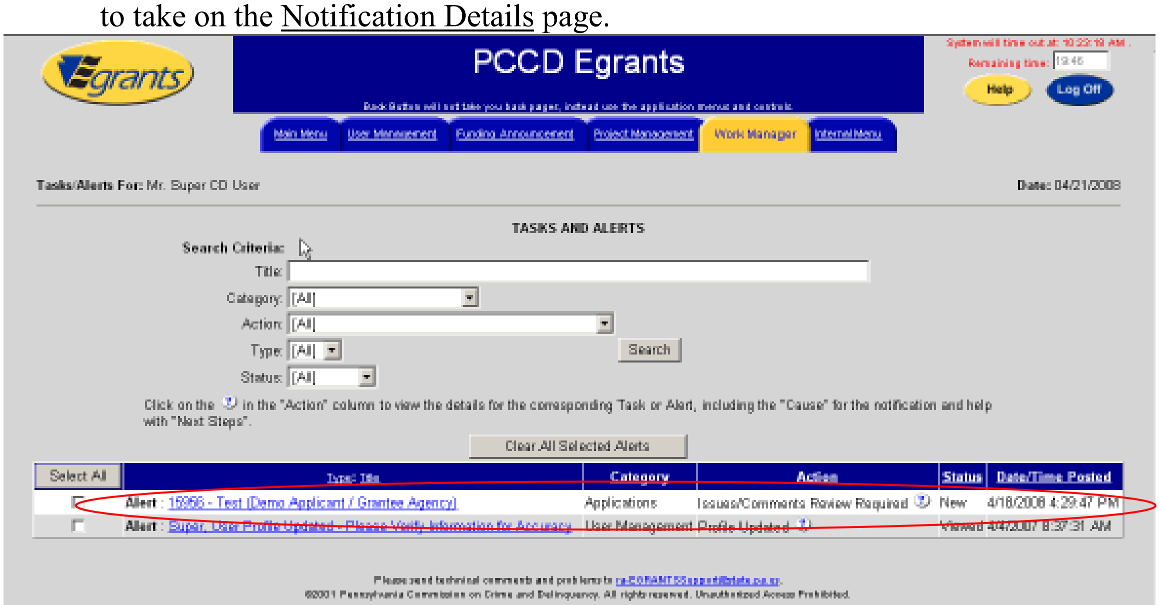
PCCD USE ONLY

Receipt Date	Award Date	Subgrant Number(s)
02/15/2005		-- 15481

1. Type of Funds for which you are applying.			
2. Applicant	Name Of Applicant: Allentown City	Federal I.D.: 23-6003116	
		County: Lehigh	
	Street Address Line 1: 435 Hamilton Street		
	Address Line 2:	Address Line 3:	
	City: Allentown	State: PA	Zip: 18101
3. Recipient Agencies	Allentown City		
4. Project Director	Name: Ms. Linda A. Bodnar	Title: Dir of Finance-Human Resources Agency: Allentown City	
	Street Address Line 1: 435 Hamilton Street		
	Address Line 2:	Address Line 3:	
	City: Allentown	State: PA	Zip: 18101
	Phone: 610-437-7521 Fax:	Email:	
5. Financial Officer	Name: Jon Hammer	Title: Assistant to the Mayor Agency: City of Allentown	
	Street Address Line 1: 425 Hamilton St		
	Address Line 2:	Address Line 3:	
	City: Allentown	State: PA	Zip: 18101
	Phone: 610-437-7521 Fax:	Email:	
6. Contact	Name: ExtUser Train01	Title: Agency:	
	Street Address Line 1: 3101 North Front Street		
	Address Line 2:	Address Line 3:	
	City: Harrisburg	State: PA	Zip: 17110
	Phone: Fax:	Email: extusertraining1@example.com	
7. Brief Summary of Project	Short Title (May not exceed 50 characters) Testing		

Returned Applications:

1. If the application is sent back to you, you will be notified in "Work Manager" under "tasks" and "alerts." Note: by clicking on the "?" in the Action column, you will learn the cause for receiving this task or alert as well as the next steps to take on the Notification Details page.

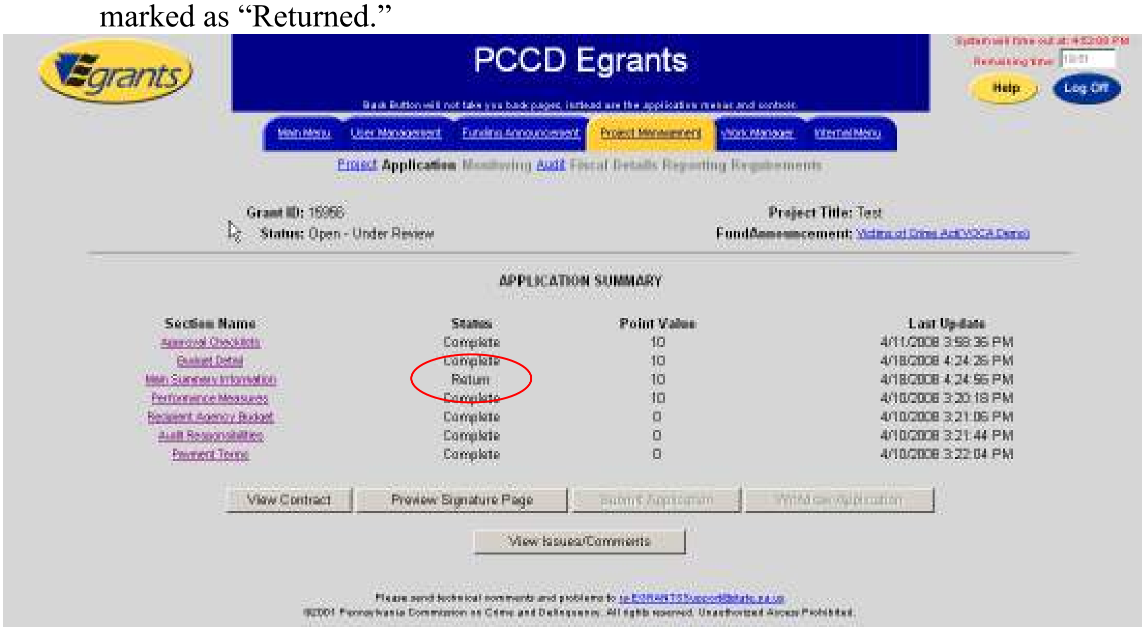


Click on the hyperlink of the returned grant and the External Issues/Comments Listing page appears.

Click on the hyperlink in the Short Title column to view the details of the corresponding Issue or Comment.

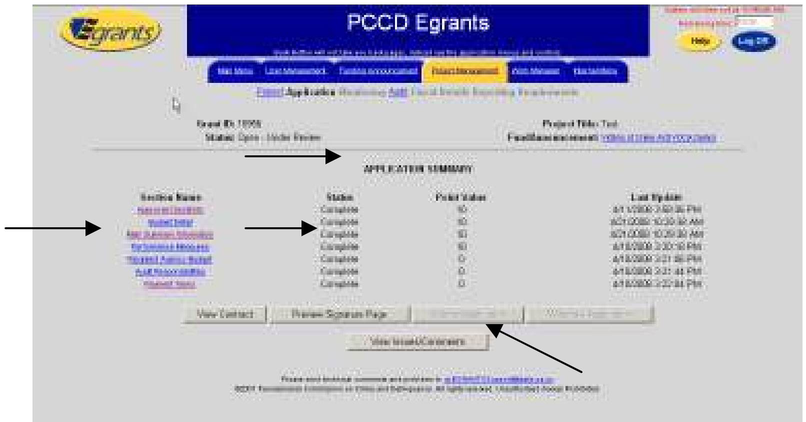
The Issue/Comment Details page appears. Note the "Due Date" associated with the Issue or Comment.

2. The application can be sent back to you in its entirety or in sections if part of the application is okay as submitted. The sections requiring changes will be marked as "Returned."



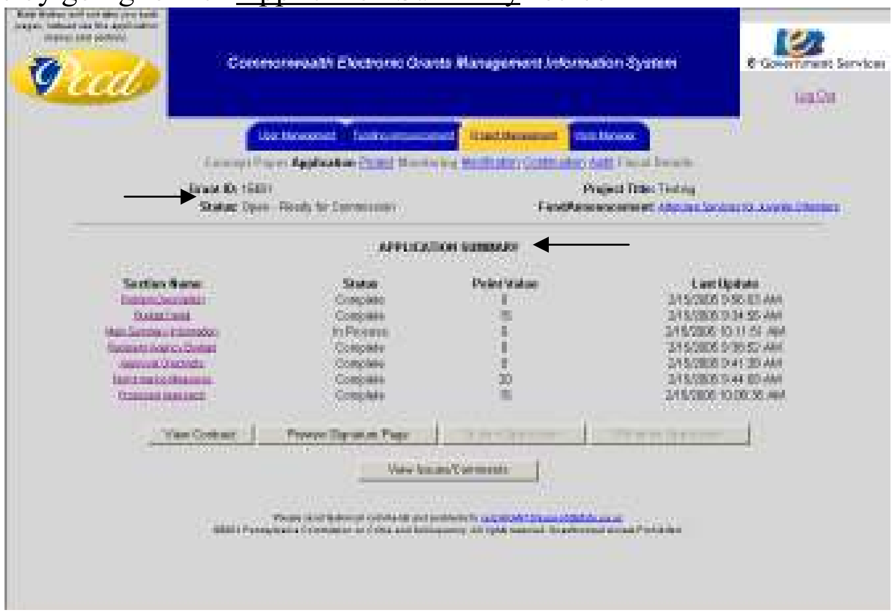
3. Go to the "<u>Application Summary</u>" screen and the section(s) that are returned will be marked as "Returned" under the "<u>Status column</u>." Click on the appropriate hyperlinks, update the "<u>Section</u>(s)" and "<u>Save</u>" the corrections. Note: Although only required to correct the "returned" sections, you can open a section marked "<u>Complete</u>," change the status to "<u>In process</u>," make

changes, change the status back to "Complete" and "Save" the changes. (As an example, you might want to change your budget narrative to reflect changes "required" in the budget.) When you are finished, click on the "Submit Application" button to resend it to PCCD.



Reviewing the Status of your Grant application while it is being developed:

1. You can review the "Status" of the sections for your grant application at any time by going to the "Application Summary" screen



Or the "Project Summary" screen.