MOVA eGrants

GRANTEE USER MANUAL

Contents

Introduction

MOVA eGrants Overview

The MOVA eGrants Portal specializes in improving functionality and ease of use. These are the areas that the MOVA eGrants Portal shines in:

- MOVA eGrants Dashboard – The MOVA eGrants Dashboard allows users to easily access grant opportunities, monitoring and compliance reports, and program budgets
- SAM.gov System Interface – The system interface can automatically gather address and contact information when confirming a valid UEI (Unique Entity ID). It also allows the system to check for expiration dates and confirm whether an organization can receive federal funding
- Easy Configuration of Program Changes – The MOVA eGrants portal takes advantage of a new drag-and-drop configuration engine to allow users to make changes to their programs. This includes easily updating forms, processes, and reports
- Updated Accessibility Features – MOVA eGrants was built to adhere to ADA and WCAG 2.1 AA standards. The portal will undergo regular 3rd party web accessibility compliance audits. It includes new options like a high contrast mode and new branding utilities

Current MOVA eGrants Contact Information

MOVA eGrants has supplied the following contact information for users:

Agency/Individual Name	Phone Number	Email Address	Website URL
Agate Software Helpdesk	1 (800) 820-1890	helpdesk@agatesoftware.com	https://agatesoftware.com/
MOVA Grants	Contact your Program Coordinator	Contact your Program Coordinator	https://www.mass.gov/info-details/egrants

System Requirements

Internet Connection

The eGrants system is a website designed for and accessed via the internet. Please ensure connection to internet before attempting to access the system.

Internet Access

This system was designed to be compatible with common up-to-date web browsers such as Microsoft Edge, Chrome, Firefox, or Safari. If the web browser is not up to date, the following message will display and require updates to the applicable browser:

Enabling Cookies

The web browser must enable cookies for this site in order to access this portal.

Multiple Browser Windows

The eGrants system cannot support multiple windows or browser tabs while filling out documents. As this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost, please refrain from accessing the system from multiple windows at one time.
NOTE: If the user needs to have multiple windows open, please ensure that the user is using a separate browser session for each open window.

If utilizing Microsoft Edge, click on **File → New Session** for each browser session. Other internet browsers will require third party add-ons to manage multiple browser sessions.

Adobe Acrobat DC

Adobe Acrobat DC (Adobe Acrobat Reader) is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat DC, the user may choose to view, print, or save these documents. Users who do not have this software installed on their systems will need to download it from www.adobe.com.

System Login Page

URL

To access the MOVA eGrants portal, navigate to the following URL: https://MOVA.intelligrants.com/
NOTE: The MOVA eGrants portal does not save the username and password. This option may be available for some browsers.

MOVA eGrants Portal Home Login Page

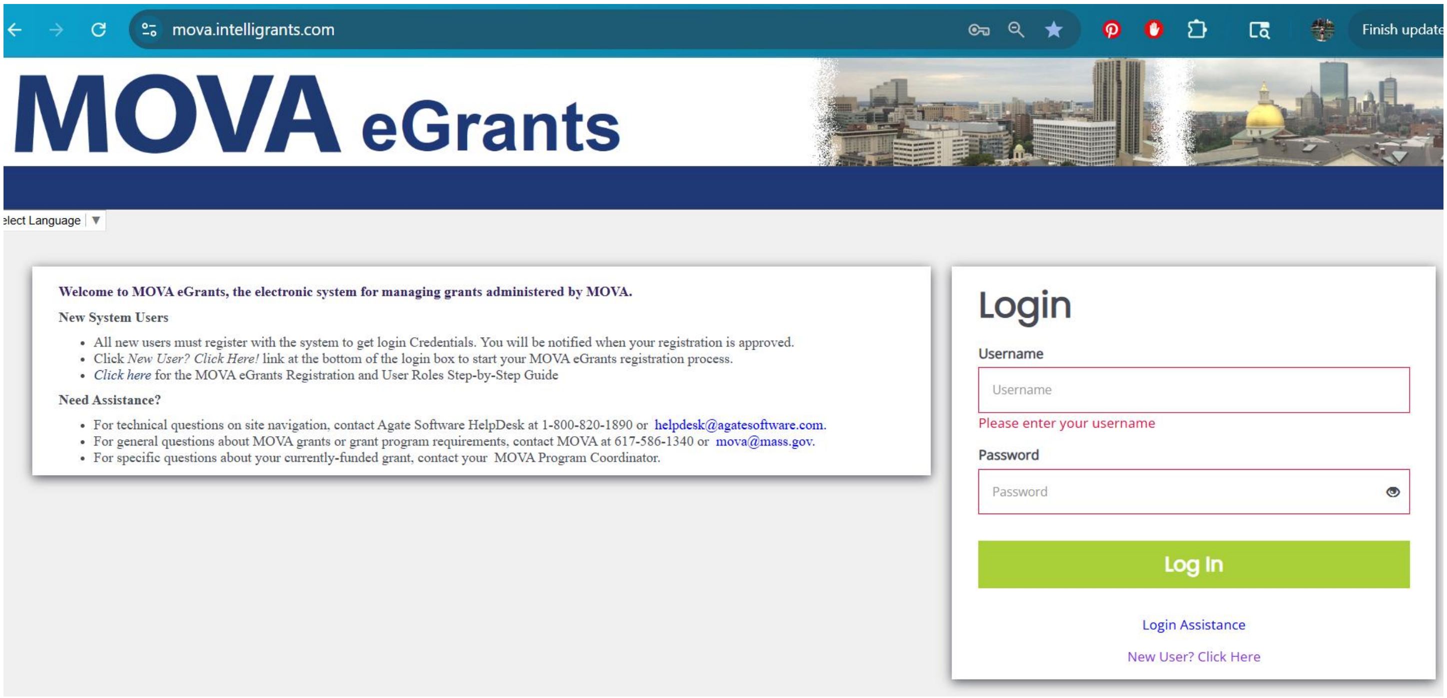


Figure 1 The Login Page

The MOVA eGrants portal login page is organized into **Welcome/Announcement** and **Login** sections.

Welcome/Announcements

This is the section where users are welcomed to the portal and allowed to view posted announcements. These announcements may include links.

MOVA eGrants Portal Login Section

The MOVA eGrants portal login process requires a user to enter in a **Username** and **Password** to login.
NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.

Logging Into the MOVA eGrants Portal

Username

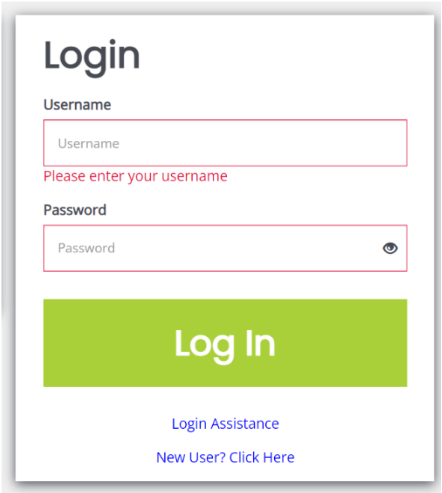
The username is created by the new user during the registration process or by the user adding this user to the organization. Please see below for more information about adding new users to your organization.

Password

The password is created when the user registers or by the user adding this user to the organization.

Log In Button

Push the **Log In** to log into the MOVA eGrants Portal.

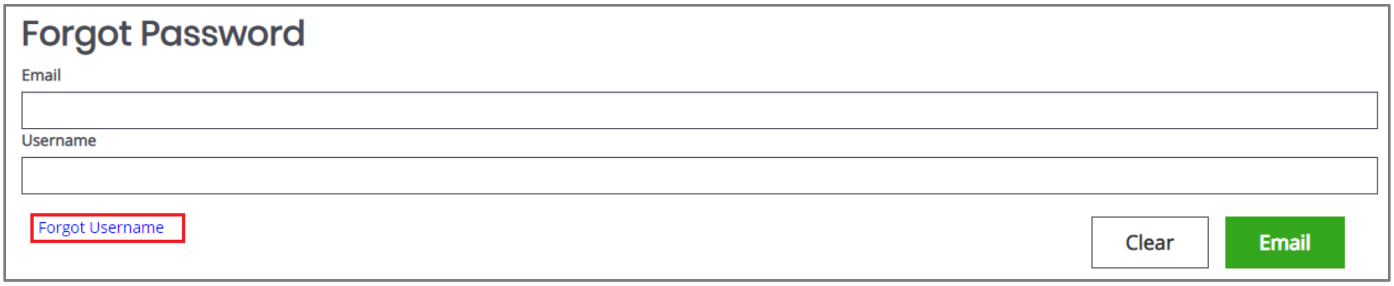


Troubleshooting Login Issues

Forgot Username

The MOVA eGrants portal allows the user to request the retrieval of their username if a user already exists and has been approved by MOVA. To do so, complete the following steps:

1) Click on the **Login Assistance** link
2) Click on the **Forgot Username** link
3) Enter the email address and click on the **Email** button. An email will be sent to that email address with the user's username



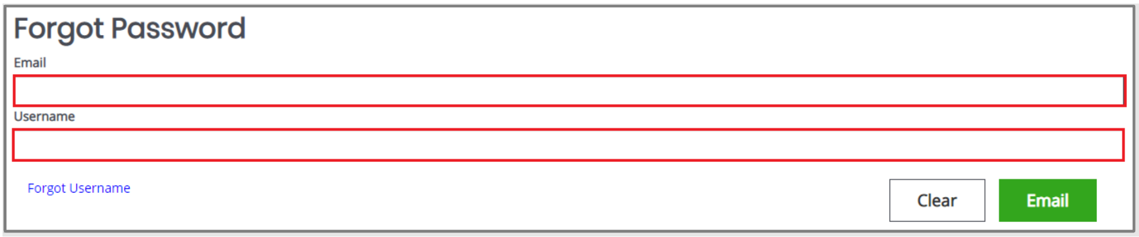
"Locked Out"

Once a user has exceeded 3 login attempts for the portal, they are "locked out." The user may use the **Forgot Password** link to request a temporary password at any point. Instructions for using the **Forgot Password** link are provided below.

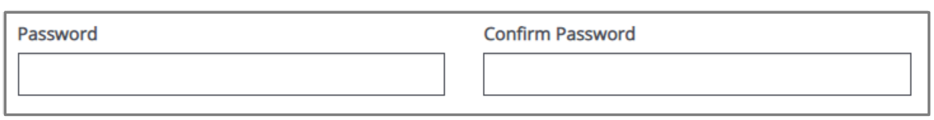
Forgot Password

The MOVA eGrants portal allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

1) Click on the **Login Assistance** link
2) Enter the username and the email address. Click on the **Email** button. A temporary password will be sent to the email address supplied



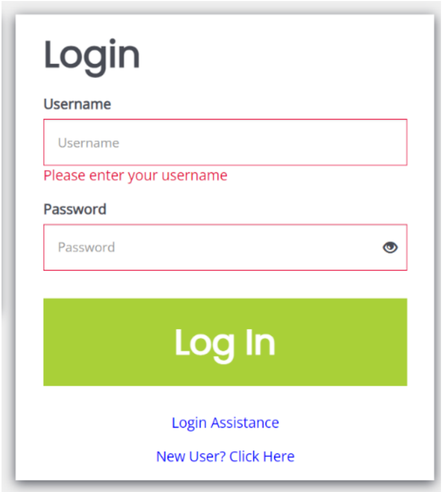
3) Once the user has received a temporary password, they will need to log in
NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.
WARNING: If you copy and paste your new password from the email to the login password box be sure not to copy an extra space. This will lead to unsuccessful login attempts and lockout from the system.
4) At this point, the user will be brought directly to the **Profile** page and prompted to create a new password. The user can use the **Edit Password** button at the bottom of the page to update the password. When the user clicks on the **Edit Password** button, the **Password** and **Confirm Password** fields are available



New User Registration

The MOVA eGrants portal allows new users to request access to the system. To do so, complete the following steps:

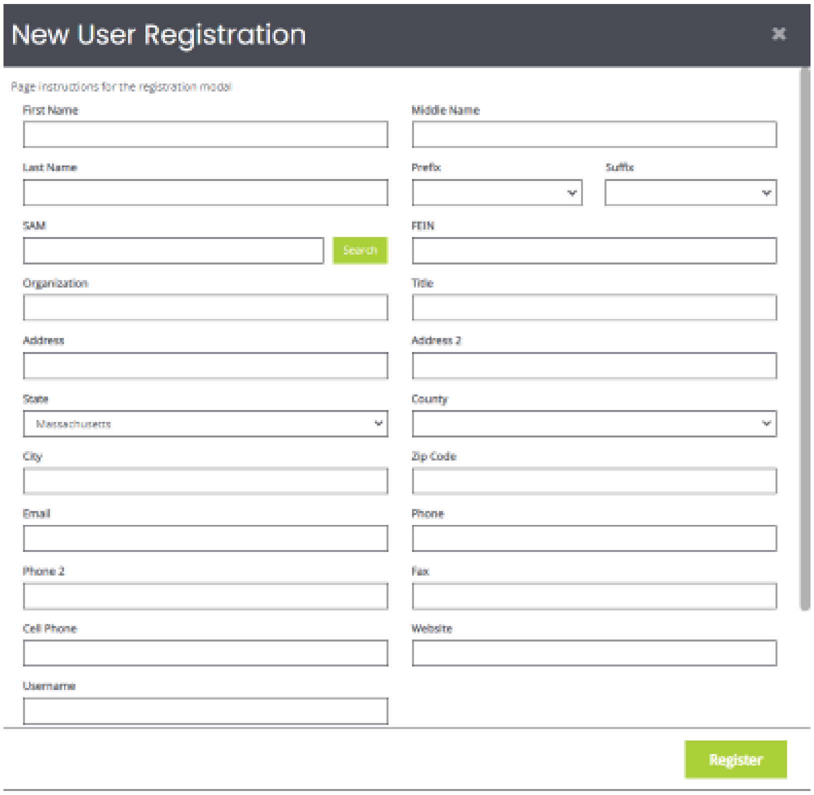
1) Click on the **New User? Click Here** link



2) Fill in the required fields (*) and any optional fields desired and click on the **Save** button

NOTE: Users registering by the *New User* link will need to be approved by pre-existing MOVA eGrants portal users.

NOTE: If a user attempts to access the system before they have been approved, the system will show their password as invalid.



Legend

First Name (Required) – the first name of the registering user

Middle Name – the middle name of the registering user

Last Name (Required) – the last name of the registering user

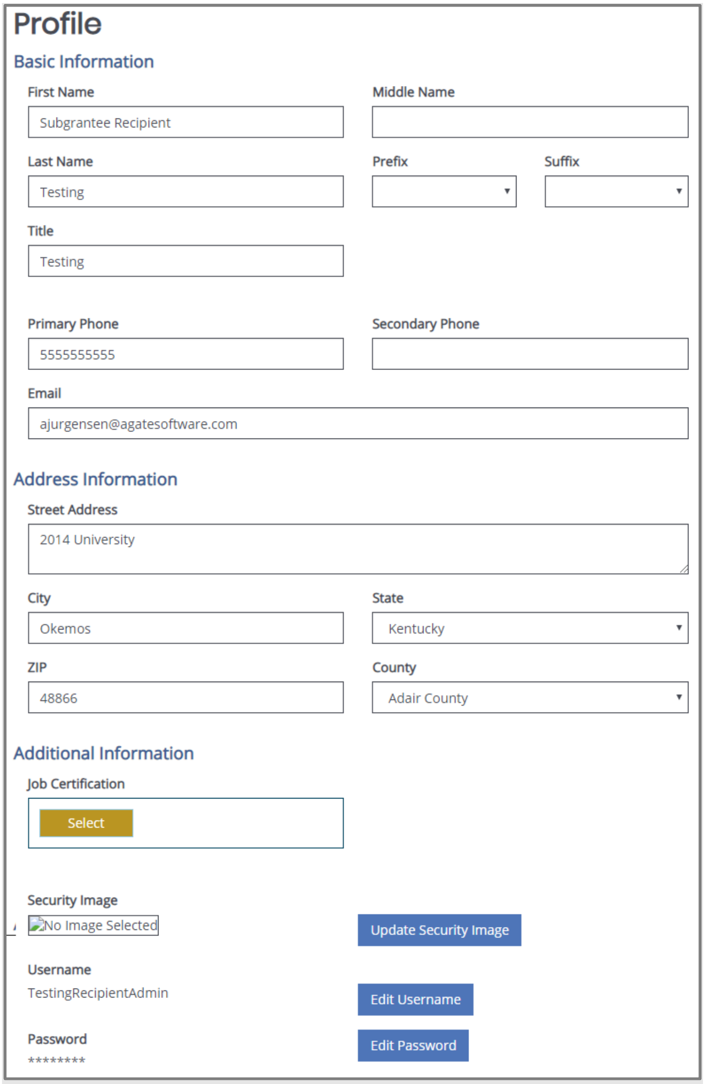
SAM – the UEI (Unique Entity ID) number for the organization the user is registering with. Enter the UEI number and click ***Search*** to verify the UEI number for that organization
Organization (Required) – the name of the organization the registering user wants to register under
Title – the position title of the registering user
Street Address (Required) – the street address of the organization the user is registering for
State (Required) – the state drop-down selection for the state of the registering user's organization
County (Required) – the county drop-down selection for the county of the registering user's organization
City (Required) – the name of the city of the registering user's organization
Zip Code (Required) – the zip of the registering user's organization
Email (Required) – the email address of the registering user
Phone (Required) – the phone number of the registering user
Username (Required) – the username the registering user wishes to register for
Password/Verify Password (Required) – the password the registering user wishes to register for

For a walkthrough of the registration, check out MOVA's eGrants Registration and User Role Step-by-Step Guide.

User Information

Once a person logs into the system, their **Profile** page and a list of organizations the individual belongs to is visible.

Profile



Basic Information Legend

First Name – the first name of the individual
Middle Name – the middle name of the individual
Last Name – the last name of the individual
Prefix – an optional prefix for the individual
Suffix – an optional suffix for the individual
Title – the position title for the individual
Primary Phone – the primary phone number for the individual

Secondary Phone – the optional secondary phone number for the individual
Email – the email address of the individual.

Address Information Legend

Street Address – the street address for the individual
City – the city the individual's street address is in
State – the dropdown menu of the state the individual's street address is in
Zip – the zip code the individual's street address is in
County – the dropdown menu of the county the individual's street address is in

Additional Information Legend

Job Certification – a repository for uploading personal certification forms
Security Image – an optional security image to implement as an additional security measure
Username – a label containing the username of the individual and a button that allows the individual to update the username
Password – a label containing the current password of the individual and a button that allows the individual to update the password

Organization Roles

This section contains a table with the label for the role the individual has in that organization, the active date field, the inactive date field, and the name of the person who assigned that individual to the organization.
NOTE: A person can have multiple organizations listed.
NOTE: A person can have multiple roles.

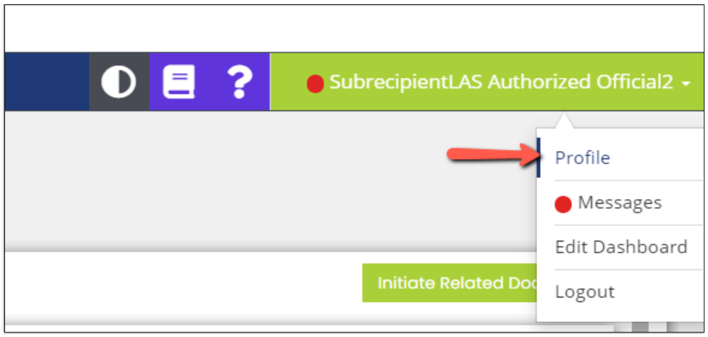
- Agency Administrator – Manages users and their roles and information about the organization Has access to all forms available on eGrants
- Application Submitter – Submits complete Applications on behalf of an organization. Has access to all forms and functions of the application process
- Programmatic Contact – Manages and submits programmatic requirements of grants, including submission of performance reports. Has access to the following forms: Performance Reports, Programmatic Change forms, Out of State Travel Request (OSTR) form, Sub Contract Request (SCR) forms, Request to Exceed Standard Consultant Rate (RESC) form, Staffing Update forms, Site Visit forms, Outcome Measurement Tool (OMT), and Subgrant Award Report (SAR)
- Fiscal Contact – Certifies and submits financial information and all federal financial reports. Has access to the following forms: Expense Reports, Budgets, Fiscal Site Visit Forms, Outcome Measurement Tool (OMT), and Subgrant Award Report (SAR)
- Data Contact – Manages and submits performance reports. Has access to the Outcome Measurement Tool (OMT) and Subgrant Award Report (SAR)
- View Only – Can view all forms within organization's profile

While Agency Administrators can add all other roles, only the respective role can add additional of its own roles. For example, Fiscal Contacts can only add other Fiscal Contacts.

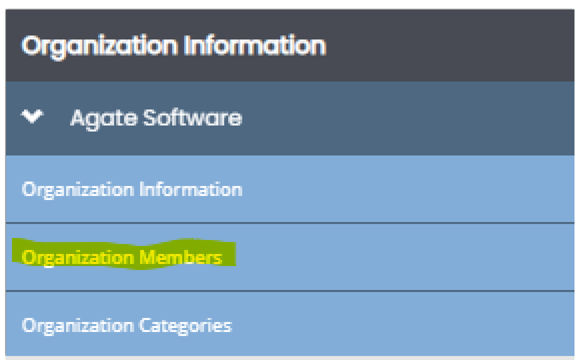
How to Add a User

To add a user to an organization:

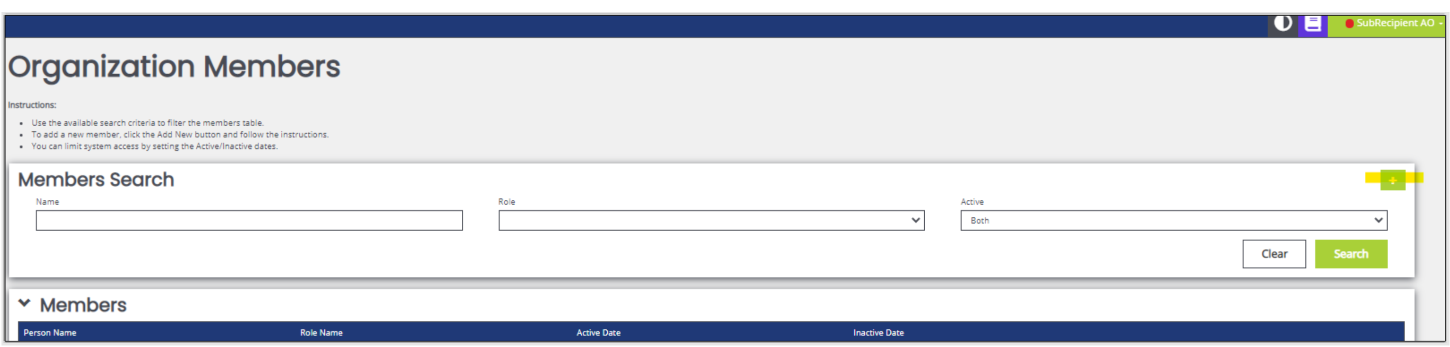
1) Select the logged in user's name in the top right corner
2) Click **Profile**



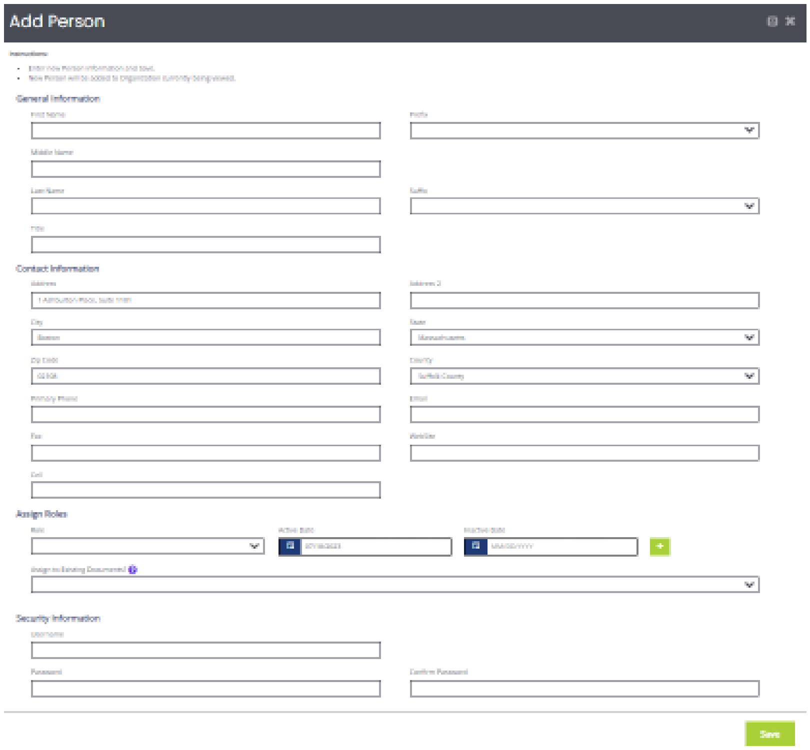
3) Select **Organization Members** under **Organization Information** from the left-hand navigation panel. This will take the user to the **Organization Members** page. Here, they can search for existing members in an organization, view all members within the organization, and add additional members to the organization.
NOTE: If the user has multiple organizations, they will be listed in this navigation panel.



4) In the **Members Search** panel, click the green plus in the right corner.



5) Selecting the green plus will bring up the Add Person window. This is where the grantee will fill out the information regarding the new member they are adding. The grantee will need to complete all required fields, assign a role, and create a username and password for the new role.



6) After all required fields have been complete, select the green save button in the bottom right to create the new user.
   a) Best practice is to select Yes from Assign to Existing Documents, which will auto-assign the new user to all relevant current documents based on the role. If not selected, then the user will need to be manually added to each document and sub-document.
7) Once the new user logs in with the username and password assigned to them during this process, they will be taken to the New User Update page to confirm user information and update password if necessary.

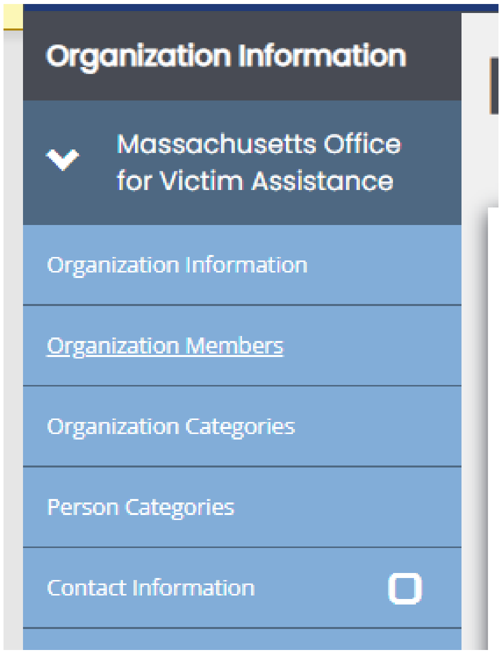
For more information about adding new users and the user roles, check out MOVA's eGrants Registration and User Role Step-by-Step Guide.

Organization Information

When a new organization is added to the eGrants system, grantee users will be responsible for filling out organizational details in the Organization Information section.

Organization Information

To access **Organization Information**, click on your name in green in the top right corner, and click **Profile**. Like described above, this will take you to your **Profile** with your **Person Information**. From there, you will see tabs in the lefthand corner. While there are multiple tabs, you will utilize **Organization Information** and **Contact Information** to access, fill out, and save the relevant organizational details.



Organization Information Tab

This **Organization Information** tab is where general information for your organization will live. The top of the page has fields for grantee users to fill out, and the bottom of the page has a MOVA Use Only section, which MOVA will be responsible for filling out and maintaining. While grantees should crosscheck all of the information in this tab, some of it may automatically be filled out.

Fill out each of the boxes with the relevant accurate information and then click Save in the upper righthand corner to lock in the data.

Contact Information Tab

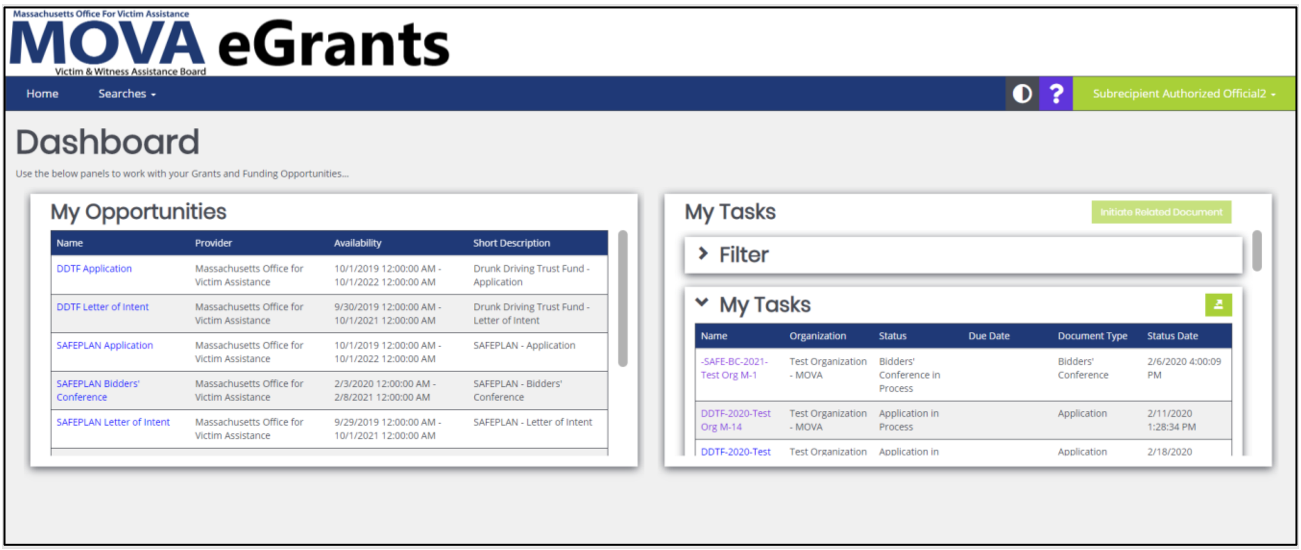
When new organizations are first added to the system, they will also be responsible for filling out the **Contact Information** tab with relevant contact information for the organization’s leadership, programmatic contact, fiscal contact, contract manager, data contact, authorized signatory for the grant, and any other contact information that MOVA should have.

Once you have filled out and are satisfied with all of the contact information, once again, click Save in the upper righthand corner.

When the **Contact Information** tab is finalized by the grantee, MOVA will lock the form. If contact information needs to be updated throughout the fiscal year, reach out to your Program Coordinator to unlock the form, make the relevant changes, and inform MOVA when those are complete so that the form and its details can be finalized once more.

Home

The **Home** page is the home page for MOVA eGrants portal users. From here, the rest of the system can be navigated.



Tabs

Home

This is a navigation link that will return the user to the **Home** page from anywhere in the system.

Searches

This is a navigation link that will allow the user to conduct document searches for that organization. The user can access this link from anywhere in the system.

Menu Options

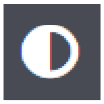
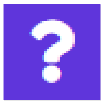
- Recent Documents
- Applications
- Compliance Monitoring
- Expense Reports
- OMT

- OMT Goals and Key Outcomes
- Programmatic Change Request
- Request to Exceed Standard Consultant Rate
- SAR
- Staffing Updates
- Sub Contract Request
- Travel Request

Reports

This will be a navigation link that allows the users to access various reports available to grantees. Information about each specific report will be shared with grantees when the reports are launched. How to use the Reports feature can be found below.

Icons

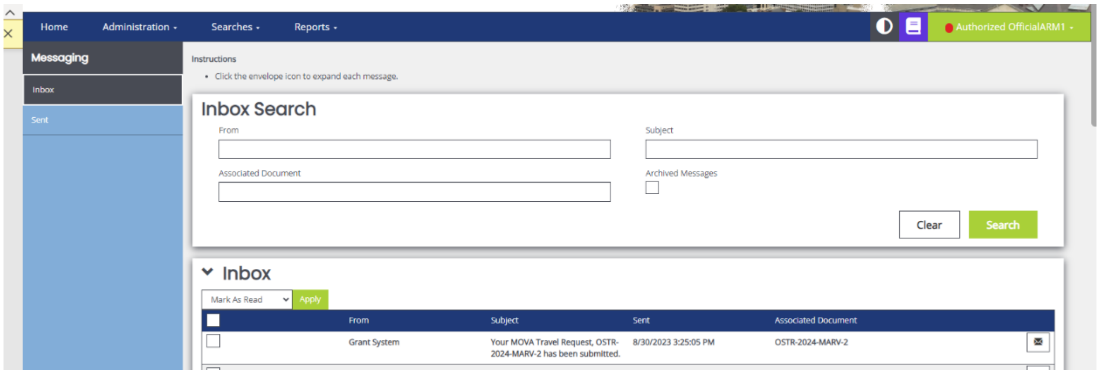
 **Theme Setting**	This button switches the theme visible from black and white to color and vice versa.
 **Training Materials**	Clicking this button will take users to the Grantee User Manual
 **Help**	Clicking this button allows general help tips to display about the current item selected.
Name	Clicking on the user's name allows the user to access the **Profile**, **Messages**, **Edit Dashboard**, and **Log Out** links.

Profile

The **Profile** tab will take you directly to your personal profile for eGrants. Find more information about your Profile in the User Information section above.

Messages

The **Messages** tab will take you to the eGrants Messaging feature.

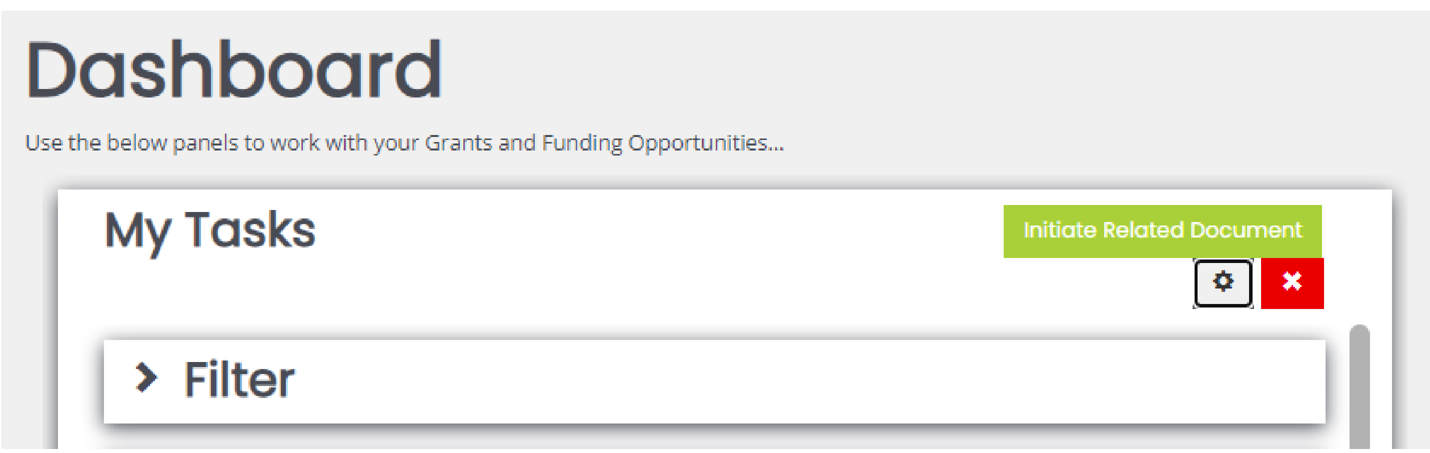


This feature will allow you to see any messages that have been sent to you from MOVA via eGrants. You can use the Inbox Search boxes to filter, or you can scroll through your inbox as is. In the lefthand panel, you can see that there are tabs for Inbox—messages received by you via eGrants—and Sent—which refers to any messages that you may have sent using the Messaging tool in a particular document (*not* Notes).

For the most part, the messages seen here will be aligned with status changes for the documents and processes that you have worked on. If MOVA is sending messages outside of status changes, MOVA will provide additional guidance and information at that time.

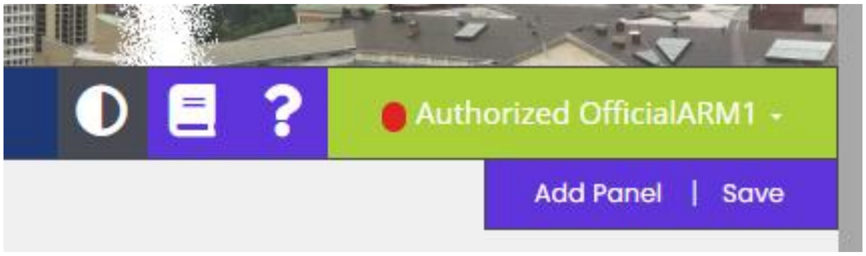
Edit Dashboard

The **Edit Dashboard** tab will allow you to add or delete panels on your home screen or Dashboard. When clicked, any panels that you currently have on your Dashboard will have a settings button and a red **X** button. While grantee users do not have any actions for the settings button currently, the red **X** will be used to delete the panel.



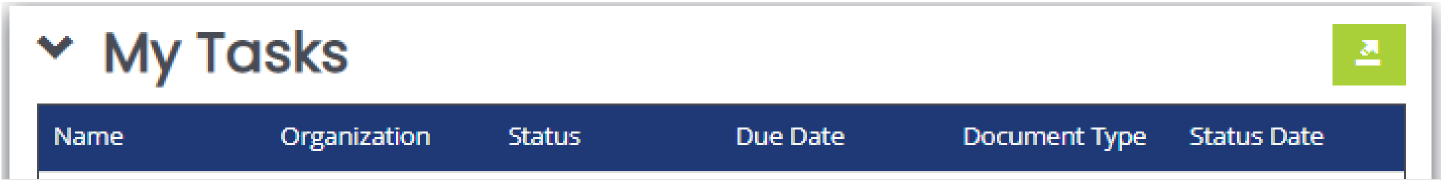
Additionally, the **Edit Dashboard** button will allow you to add panels, if there are any available to you, via the **Add Panel** button in the top right corner. At this time, grantees can have up to 3 panels on their **Dashboard**: **My Tasks**, **My Opportunities**, and Announcements. More info about these panels can be found below.

To exit the **Edit Dashboard** feature, simply click **Save** in the upper righthand corner.



Log Out
The **Log Out** tab will promptly log you out of the system and refresh back onto the login page.

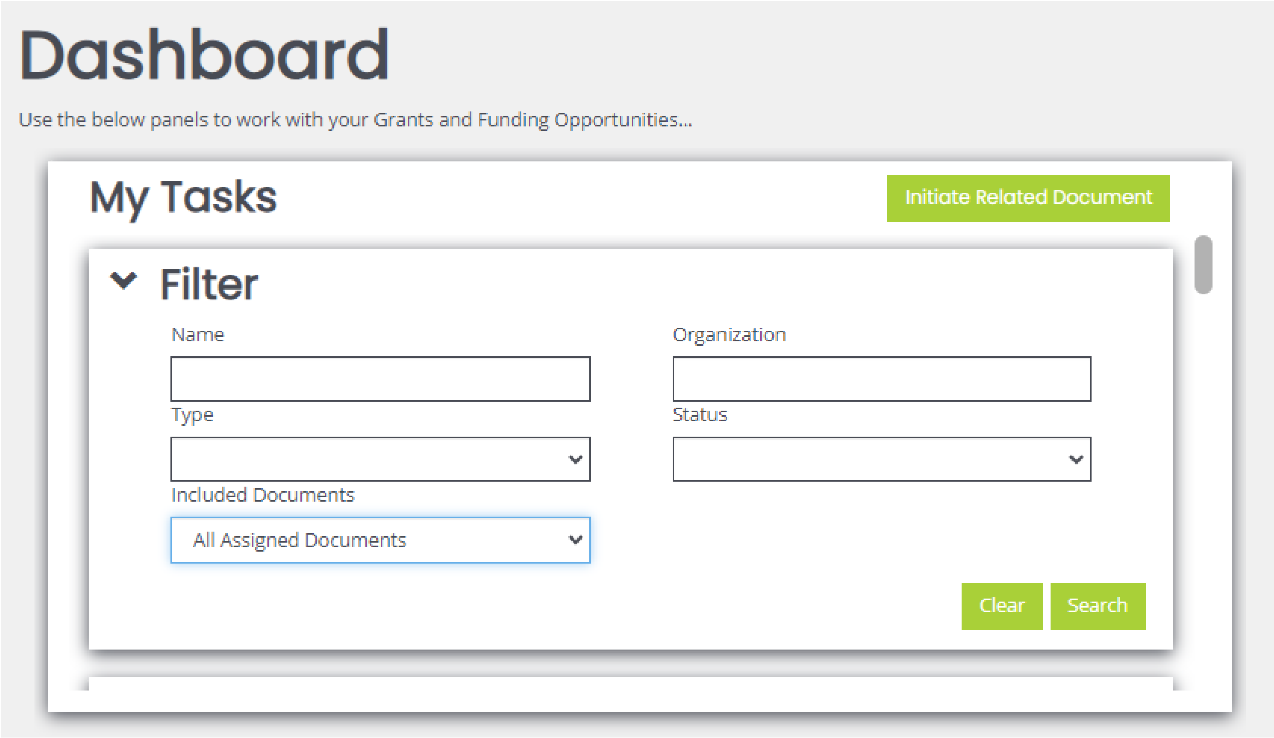
Dashboard
My Tasks
My Tasks defines the tasks assigned to the user. It also gives the user a way to initiate a related document (such as an expense report). Your tasks can be organized based on columns by clicking the column title.



This area can also be filtered using the **Filter** function.

Using the My Tasks Filter
To use the **My Tasks Filter** on a list of tasks assigned to the user, please follow these instructions:

1. Click on the **>** sign next to the **Filter** header
2. Enter data into any of the fields and/or select an option from the **Type** drop-down
3. Click the **Search** button



Users now have the ability to view any document they are assigned to in the system, regardless of the status. Within the My Tasks dashboard, expand **Filters**. Under the "Included Documents" dropdown, select **All Assigned Documents** and click **Search** to reveal all of the documents a user is assigned to in the system.

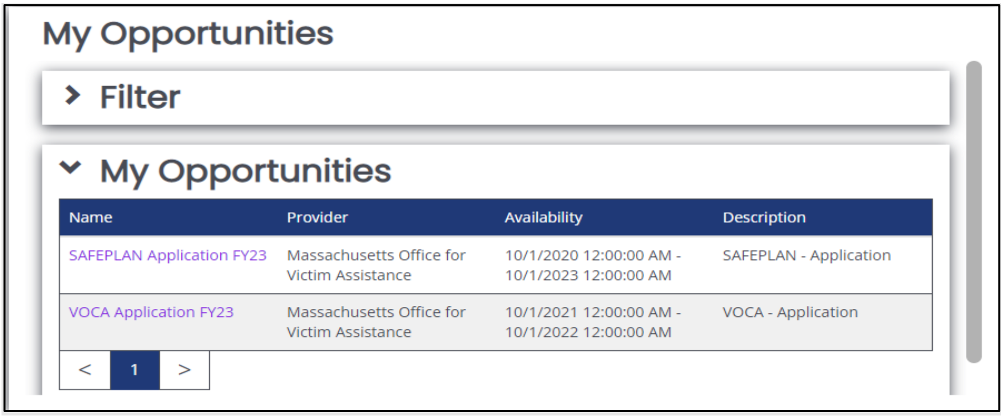
Users also have the ability to hide tasks from view. To hide, toggle the "eye" icon located to the left of the Task. To unhide a task, expand **Filters** from the **My Tasks** dashboard panel. Under the "Included Documents" dropdown, select **Hidden Tasks**. Click **Search**. You can unhide a hidden task by selecting the "eye" icon again.

Announcements

Announcements is an area that allows the user access to announcements from the portal designers. These announcements can include (but are not limited to) training dates, news updates, or website links.

My Opportunities

The **My Opportunities** area allows the user to start grant opportunity documents (usually applications).


My Opportunities
Filter
My Opportunities
Name
Provider
Availability
Description
SAFEPLAN Application FY23
Massachusetts Office for Victim Assistance
10/1/2020 12:00:00 AM - 10/1/2023 12:00:00 AM
SAFEPLAN - Application
VOCA Application FY23
Massachusetts Office for Victim Assistance
10/1/2021 12:00:00 AM - 10/1/2022 12:00:00 AM
VOCA - Application
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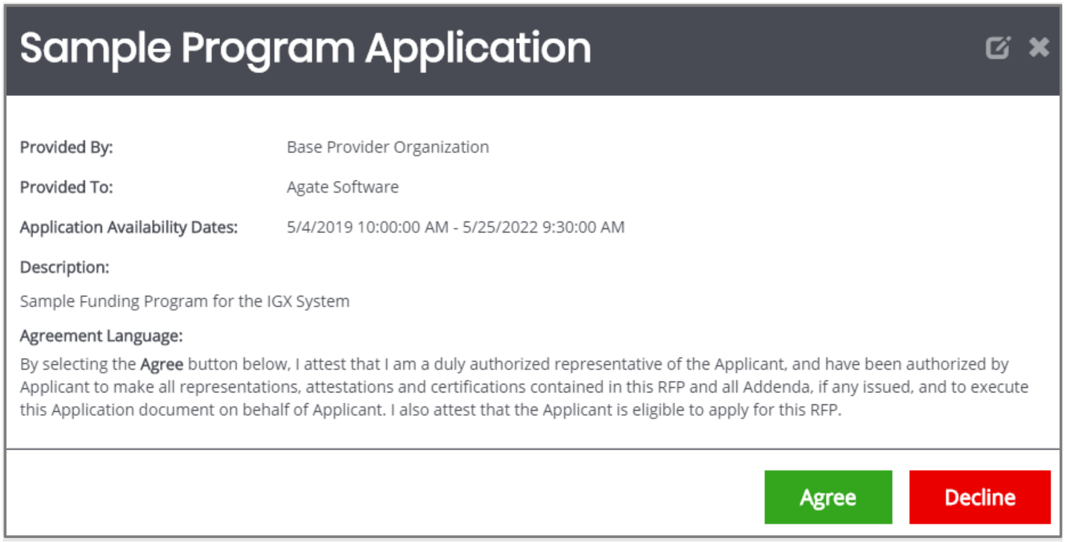
>

Applications

Starting an Application

To start an application, please follow these instructions:

1) Click on the relevant application name in the **Name** column from **My Opportunities**. This brings up a menu with more information and the **Agree** or **Decline** buttons



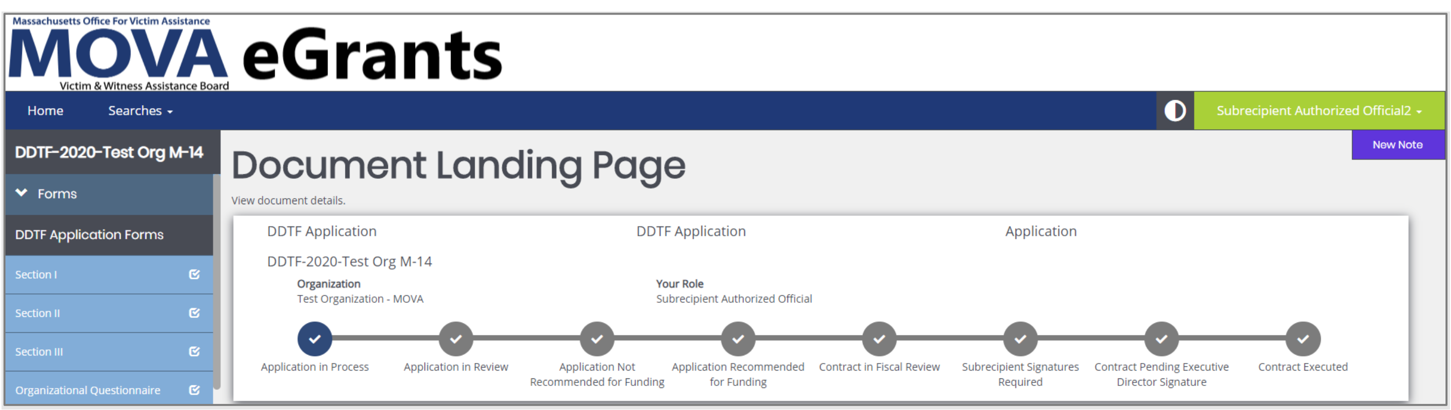
2) Click on the **Agree** button

Working on an Application

Once an application has been initiated using the steps above, the user will be taken to the Document Landing Page for the application.

The Document Landing Page

The Document Landing Page contains several sections and the **New Note** button in the upper right corner.

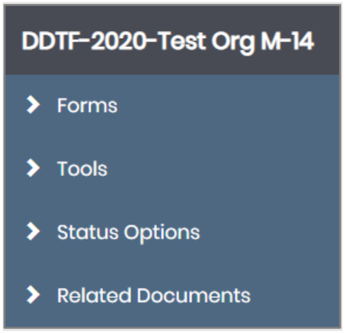


Application Name
The number listed above the **Forms** header is the application number. It also functions as a link to bring the user back to the **Document Landing Page**. It is important to note the application name in the top left corner, especially if submitting more than one application per organization.

Document Details
The Document Details section located on the **Document Landing Page** provides visual data including the grant opportunity status, future statuses, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

New Note Button
The **New Note** button allows a user to leave a note for other users.

Forms Menu
The **Forms Menu** is divided into sections containing individual forms for the user(s) to fill in. There are drop-down arrows next to the Forms header that allow the forms to be hidden and other sections uncovered.

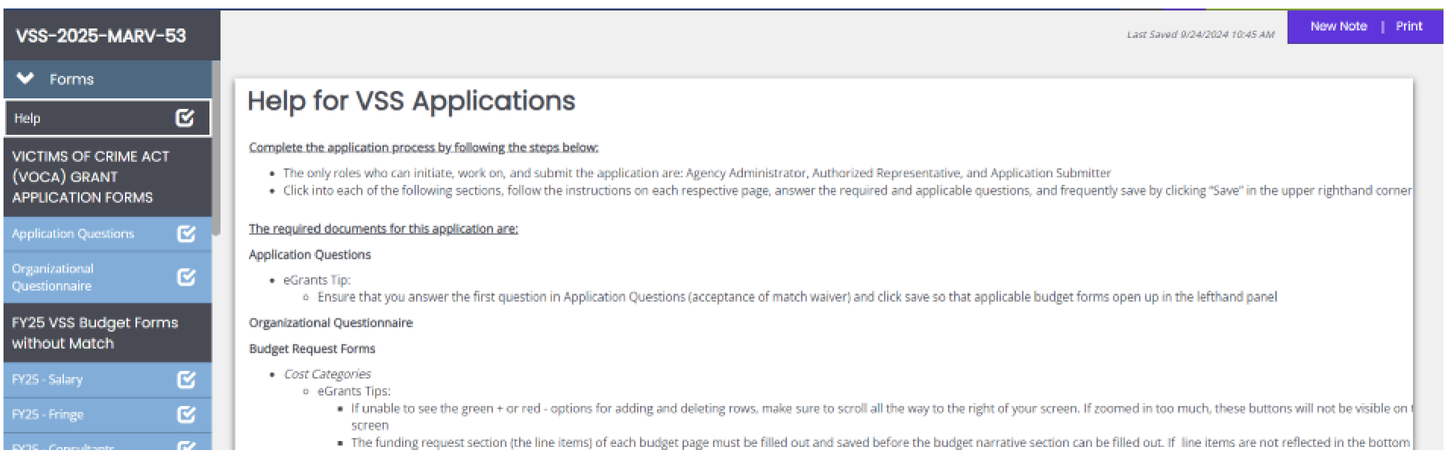


Legend
Forms – the list of forms. Usually forms without sections are listed first, then the form list is broken into sections
Tools – a list of functions available to the user
Status Options – a list of possible status options to apply to the application. This list will vary from user to user, depending on which role the user is logged in as and the current status of the application
Related Documents – a list of related documents (primarily reports) associated with the application

Application Forms
Forms
While the screenshots listed here are just an example of what an application and its associated forms could look like, make sure to refer to the most recent training materials and CGA documents for more information about what to expect from any active applications.

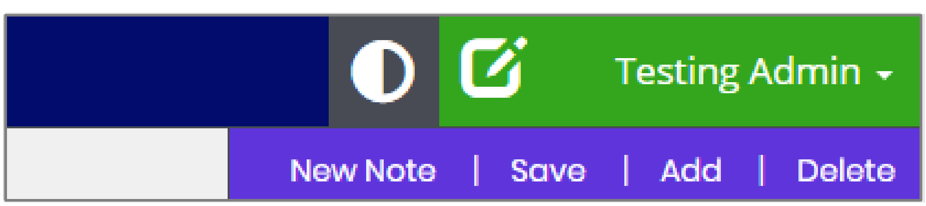
The list of forms is usually divided into sections, with the first section visible being the default form location.

Clicking on a form link in any section will bring up that form. The example listed below is of the Help Page, which will be available for all different forms in eGrants and provides instructions, tips, and resources for the process at hand. The Help Page is not required nor can it be filled out.



Form Options

There are additional tools in the purple banner on the right side of the screen. Below are all the possible options, but not all will be available for all forms.



Legend

New Note – allows the user to create a new note for other users

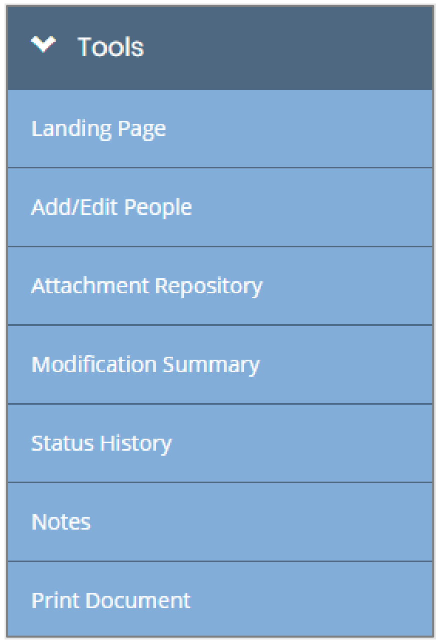
NOTE: For more information, please see the Notes section in the Tools area.

Save – allows the user to save the form

Add – allows the user to create an additional instance of the form. It is the digital equivalent to being handed an extra piece of paper of a specific form to staple to an existing packet of forms
Delete – allows the user to delete the instance of the form that is visible to the user. Clicking on the **Delete** button will clear out the fields on the form (including any uploaded attachments)

Tools

The **Tools** section contains a list of customized tools available to the user depending on the role assigned to the user.



Legend Summary

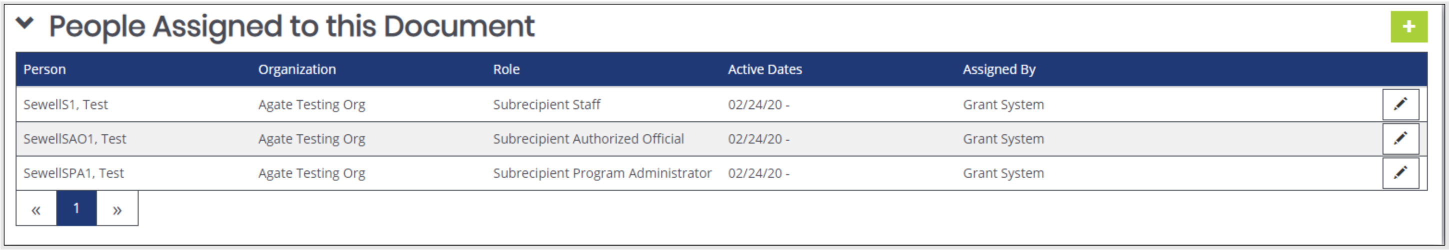
Landing Page – the default application page
Add/Edit People – allows the user to add/edit other users' access to a specific document, in this case, the application
Attachment Repository – allows the user to access a list of stored attachments
Modification Summary – allows the user to access a summary of modifications for a specific document
Status History – allows the user to access a history of the status(s) of a specific document
Notes – allows the user to create/view/edit notes for a specific document
Print Document – allows the user to create a PDF of the document

Landing Page

Clicking on this link returns the user to the **Document Landing Page**.

Document Add/Edit People

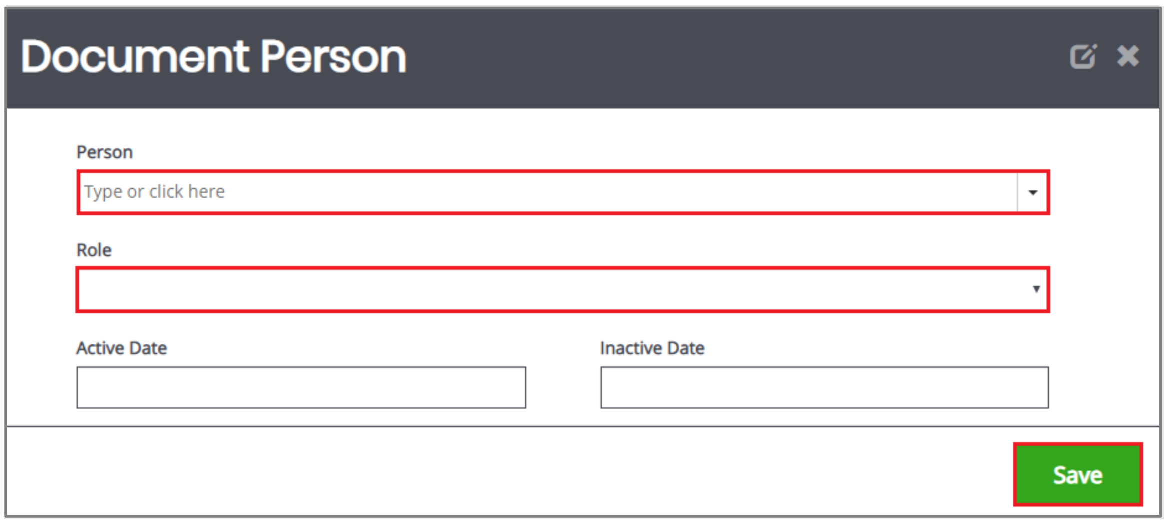
This tool allows authorized users to add/edit people to the document.



Adding/Assigning People to the Document

To add/assign a person to the document, please follow these instructions:

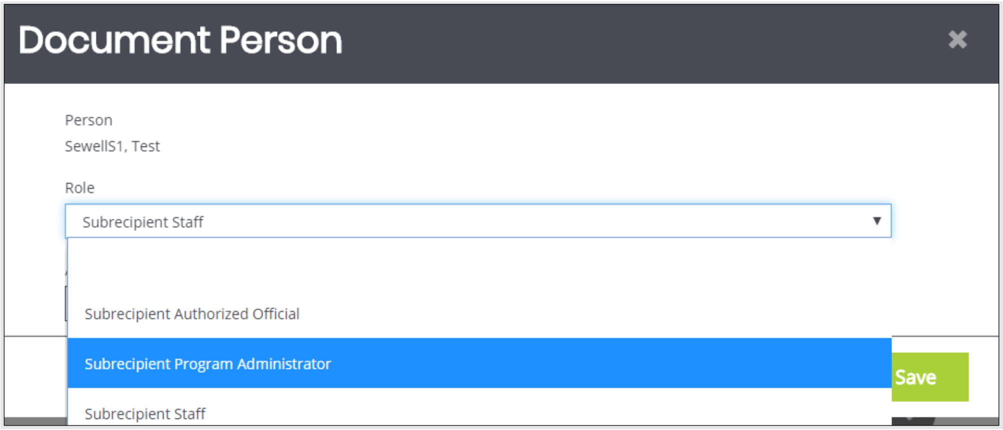
1) Click on the **Plus Sign** button on the **People Assigned to this Document** panel
2) Select the **Person** and **Role** options from the drop-down menus
3) Click the **Save** button
   NOTE: This will automatically assign today's date. If a past active date is required, please use the menu in the Active Date field to select the date.



Editing People Assigned to the Document

To edit the role of a user assigned to the specific document, please follow these instructions:

1) Click on the **Pen** button on the right side
2) Select a role from the **Role** drop-down list
   Optional: Update the Active Date field.
3) Click the **Save** button



Attachment Repository

This tool allows the user to view files that have been added as attachments throughout the document.

Document Modification Summary

This tool allows the user to view and/or download the modification summary.

Status History

This tool allows the user to view the status of the document – including the **Status** name, **Date/Time** the document had that status, and the name of the **Person** who changed the status of that document. There is also a field for status notes.

Notes

This tool allows the user to add/edit notes.

Adding a New Note

Please use these instructions to create a note.

1) Click on the **New Note** button
2) Fill in the field
3) Click on the **Paperclip** icon to attach files
4) Click on the **Paper Airplane** icon to save the note

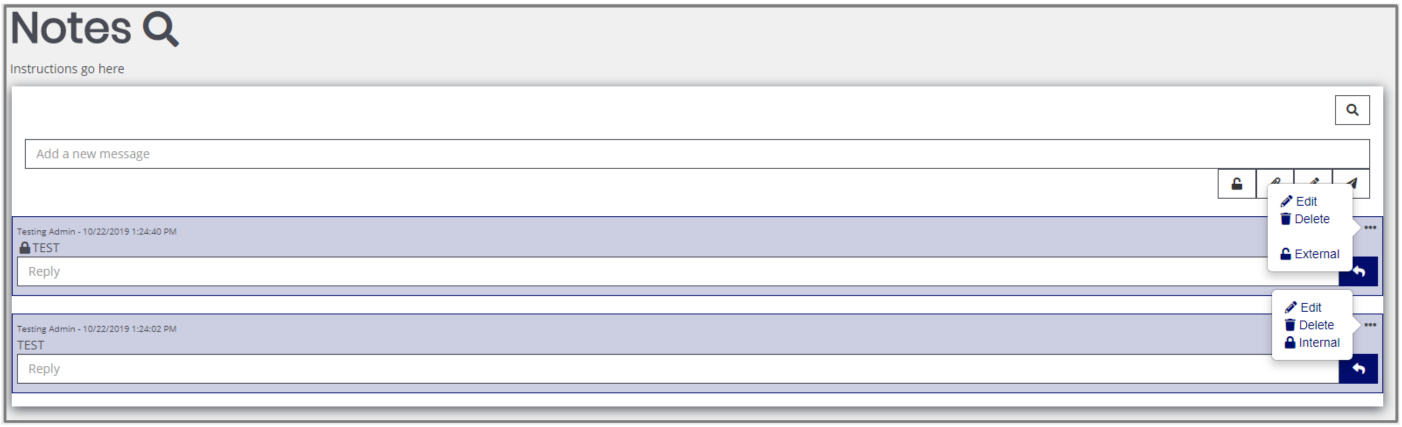
Additional Fields

Icon	Name	Description
	Internal Note	This tool locks this note into the form as an internal note. The internal notes are only visible to members within the same organization.
	Attachment(s)	This tool allows the user to add attachments to the note.
	Editor	This tool allows the user to edit a note.
	Save Note	This tool allows the user to save the note.

Locating a Note

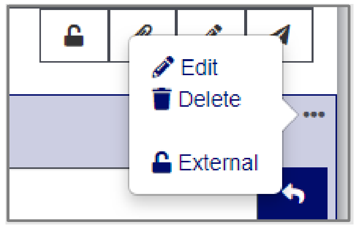
Once a note is created, it ends up in the **Notes** area of the **Tools** menu. To access the note, please follow these instructions:

1) Click in the **Forms** section to minimize that section
2) Click on the **Notes** link in the **Tools** section

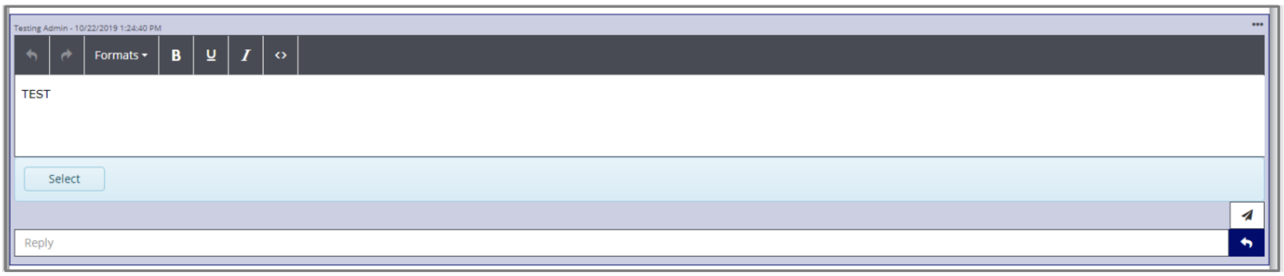


Updating a Note

1) Click in the **Forms** section to minimize that section
2) Click on the **Notes** link in the **Tools** section
3) Click on the … icon. This brings up the **Edit, Delete** and **External/Internal** tool buttons



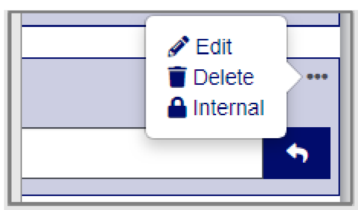
4) Click on the **Edit** tool to edit the text field



5) Click in the text field to adjust the formatting and/or the contents of the note
6) Click the paper airplane icon to save the updates to the note

Deleting a Note

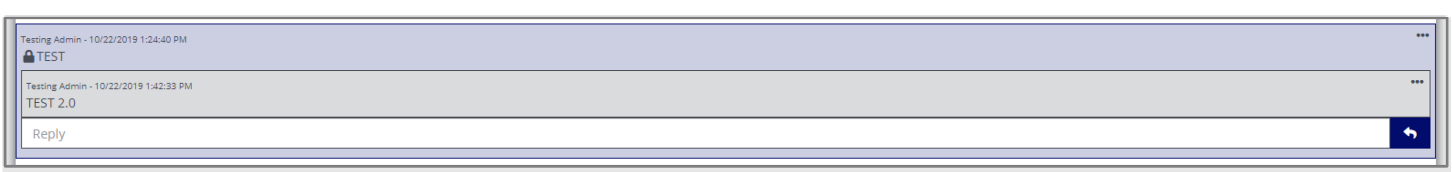
1) Click in the **Forms** section to minimize that section
2) Click on the **Notes** link in the **Tools** section
3) Click on the … icon. This brings up the **Edit, Delete** and **External/Internal** tool buttons



4) Click on the **Delete** button to delete the note

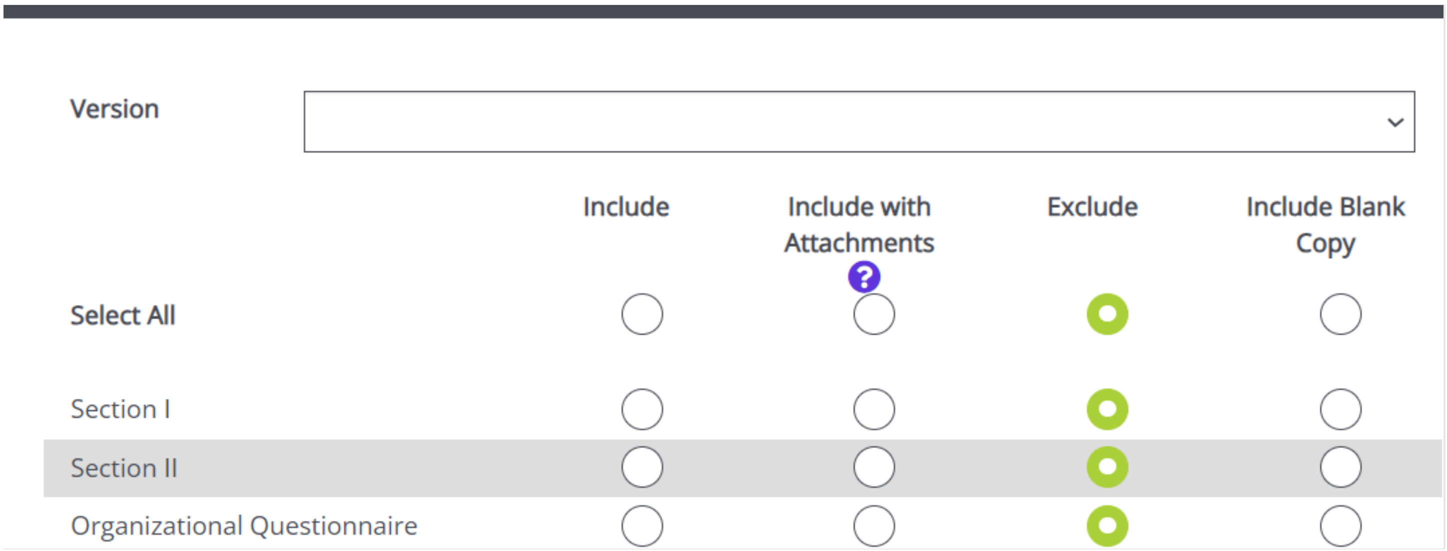
Replying to a Note

1) Click in the **Forms** section to minimize that section
2) Click on the **Notes** link in the **Tools** section
3) Add a response to the **Reply** section and click on the airplane icon



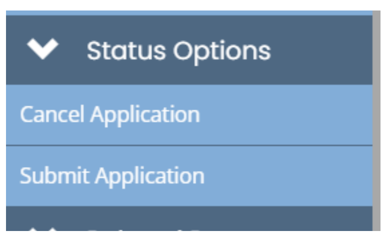
Print Document

This tool allows the user to create a PDF version of the document to save onto the user's computer and/or print out. Each form has the option of being included in the printout (with both questions and answers), excluded in the printout, or including a blank version of that form. Attached documents to these forms can also be downloaded into the PDF file.



Status Options

The **Status Change** area allows the user to change the status of a document. This is normally useful for submitting applications, signing contracts, or requesting grant modifications.



Related Documents

The **Related Documents** section is where the user can access documents that are related to the application/contract.

Searches

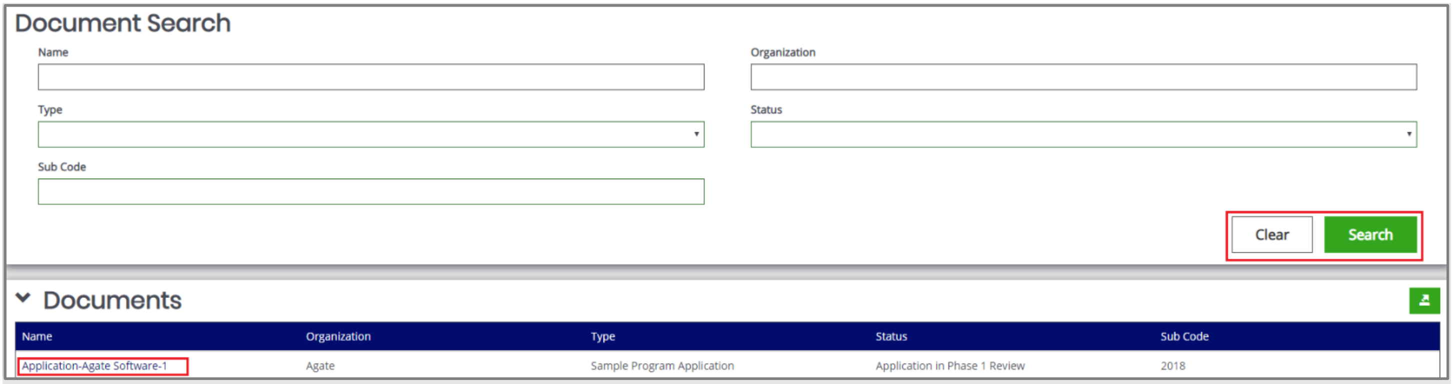
The **Searches** tab is used to quickly locate specific documents. Different types of searches have their own search sections set up. The sections below explain how to use these search sections.

Legend

Name – A text field for the name of the document
Organization – A text field for the name of the organization that created the document
Type – A drop-down list to select the type of document from
Status – A drop-down list to select a specific document status from
Sub Code – A text field to enter the sub code of the document in

To use this search tab, please follow these instructions:

1) Select the **Searches** tab and select the document type you are searching for
2) Optional: Enter in search parameters. Click the **Clear** button to clear out search parameters
3) Click the **Search** button
4) Click on the name of a specific document in the **Name** column



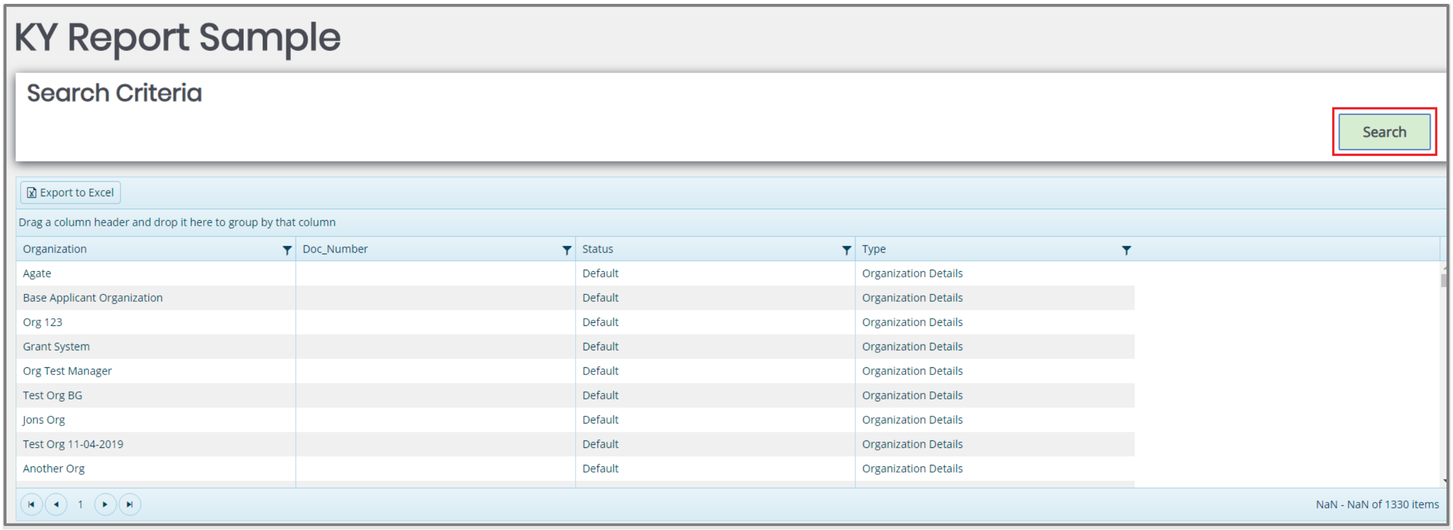
Reports

This tab is used to access reports available to users. The reports and report groups may vary based on fiscal year and MOVA's needs

Accessing a Report

To access a report, please follow these instructions:

1) Go to **Reports** →[Specific Report Group (Optional)] or [Specific Report]
2) Enter in search criteria (optional) and click the **Search** button

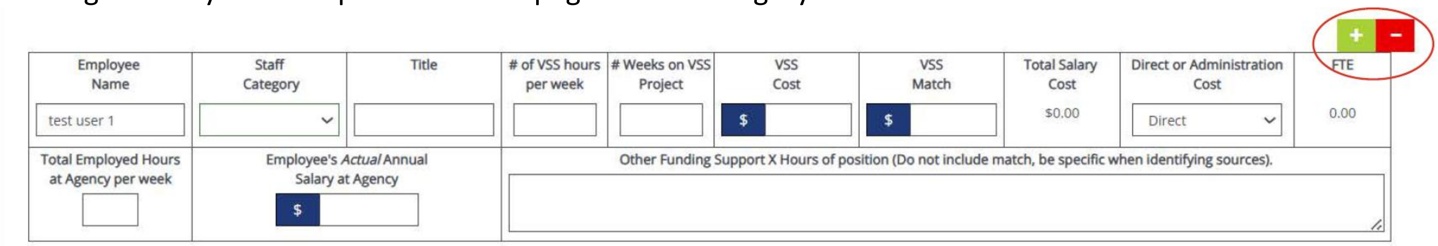


Types of Forms

There are several types of forms within the MOVA eGrants system. These forms can be found within the lefthand navigation panel of any document. More information about each specific process and its forms can be found in its respective training materials.

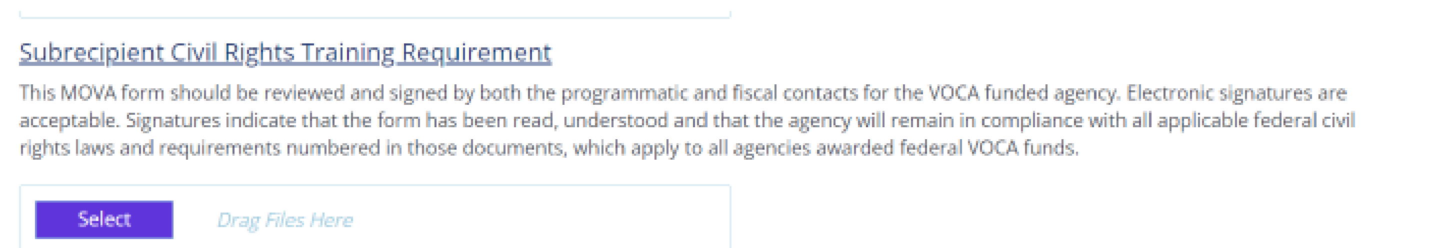
Budget Forms

Applications will oftentimes have specific budget forms where grantees are responsible for putting requested costs or line items into respective categories, which can vary by grant type. Below is an example of the Salary page. Fill out all of the information for each person on the budget and click **Save**. Additional rows for more line items, or in this case staff, can be added by clicking the green + sign. Once a second row is added, a – sign will become available for deleting unwanted rows. Clicking the – sign will erase a row from the screen. If there is a single row in a cost category and you wish to delete it, click the green + to create a new row, then delete the original row by clicking the red – sign. Merely erasing information in the single row will generate an error message when you attempt to leave the page or cost category.



Hyperlinked Sections

When this type of form is selected, it will prompt a file download for the user to fill out and save. One of the most frequent examples of hyperlinked sections can be found on the Contracting Form in the application/contract (example shown below).



To prompt a file download, please follow these instructions:

1) Click the link of the form from within the eGrants page
2) This will automatically download the form onto your computer

Uploads

Oftentimes, but not all the time, hyperlink forms will be accompanied by required or optional uploads. Any upload opportunity will have a **Select** button that allows you to navigate potential files to upload and the **Drag Files Here** space, where files can directly be dragged via mouse from a place on your computer onto eGrants.

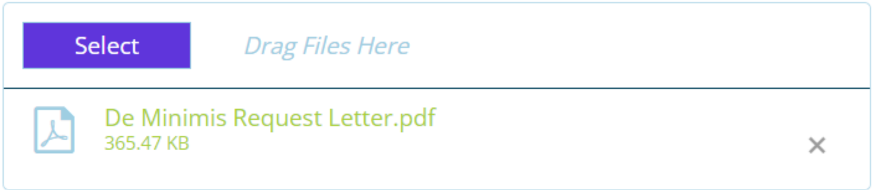
To upload a document using the **Select** button to browse, please follow these instructions:

1) Click the purple **Select** button on the form to open the File Explorer popup window
2) Locate the desired file
3) Click **Open**

To upload a document using the **Drag Files Here** feature, please follow these instructions:

1) Locate the desired file on your computer
2) Have the **Drag Files Here** space open
3) Use your mouse to drag your file from the space onto your computer onto the **Drag Files Here** space

Once the file has been successfully uploaded using either methodology, the user should see the file name displayed underneath the upload field. To delete an unwanted file, click the **X** found at the end of the uploaded document.



Types of Processes

There are several types of processes within the MOVA eGrants system.

Expense Report Process

This process is initiated by an Agency Administrator or Fiscal Contact. Log in as one of these roles and find an application that is in the **Contract Executed** status to initiate an Expense Report.

1) Under the MOVA eGrants logo in the top left corner, click on **Searches**
2) Select **Applications**
3) In the **Status** dropdown, find **Contract Executed** and select it.
4) Click the green **Search** button. This should populate all the applications in the **Contract Executed** status

NOTE: Click Search without using any of the filters, and all of the applications that a user has access to will appear.

Forms for the Expense Report Process

Forms that need to be filled out: **Backup Worksheet** and **Expenditure Summary**. More information about the expense report process can be found in the respective training materials from MOVA. See MOVA's eGrants webpage for expense report guides and resources.

Backup Worksheet

The Backup Worksheet is a form where the user will enter in the funds spent. Once a user enters data into the Backup Worksheet, data will be copied onto the next Expense Report initiated after it and so on. When the next Expense Report is initiated, it will pull the data from the last Expense Report and populate the Backup Worksheet from the last Backup Worksheet created. Although the data will be auto-populated, it can and should be altered to reflect the current Expense Report at hand.

Expenditure Summary

The Expenditure Summary form keeps track of the funds entered on the Backup Worksheet. It is a summary of current and past expenditures for the contract and was formerly the coversheet to the Excel expense reports submitted before FY23.

Finding & Completing Expense Forms

Once an expense report is initiated, the user will have access to the required forms. In the lefthand panel, locate the section titled **Forms**. This is where the Expense Report forms are located. The user can select which forms they would like to view or work on. The examples below are shown for the VSS grant, but similar forms will be available for all of MOVA's grants on eGrants. Once the data is entered into the Backup Worksheet, ensure your data is documented and saved by selecting the **Save** button in the top right corner. Then view the Summary to see and review present and past expense report data.

VSS Expenditure Summary with Match example

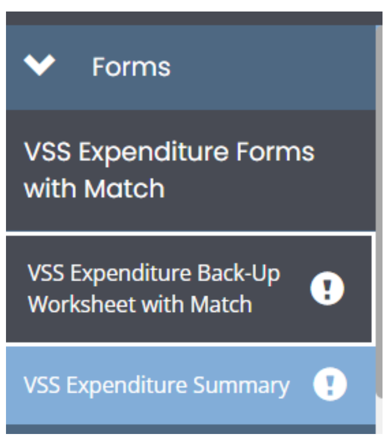
VSS Expenditures:	October
Agency:	
Program:	

Budget Cost Category	VSS Approved Budget	Year-To-Date Spending Approved: $ Amount	Year-To-Date Spending Approved: % Amount	Current Period Request	Year-To-Date Spending *Pending PC Approval*: $ Amount	Year-To-Date Spending *Pending PC Approval*: % Amount
Personnel (Salary + Fringe)	**$104.00**	**$0.00**	**0.00%**	**$0.00**	**$0.00**	**0.00%**
Salary	$100.00	$0.00	0.00%	$0.00	$0.00	0.00%
Fringe	$4.00	$0.00	0.00%	$0.00	$0.00	0.00%
Consultants	$10,000.00	$0.00	0.00%	$0.00	$0.00	0.00%
Office & Admin	$0.00	$0.00	%	$0.00	$0.00	%
Other (Equipment+ Travel + Contracts + Other + Indirect)	**$0.00**	**$0.00**	%	**$0.00**	**$0.00**	%
Equipment	$0.00	$0.00	%	$0.00	$0.00	%
Travel	$0.00	$0.00	%	$0.00	$0.00	%
Contracts	$0.00	$0.00	%	$0.00	$0.00	%
Other	$0.00	$0.00	%	$0.00	$0.00	%
Indirect	$0.00	$0.00	%	$0.00	$0.00	%
Totals:	$10,104.00	$0.00	0.00%	$0.00	$0.00	0.00%

Match Expended

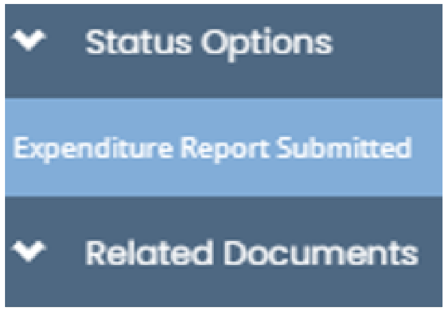
		Year-To-Date Match Amount Expended			Year-To-Date Match Expended *Pending GM Approval*	
Budget Cost Category	Approved Match	$ Amount	% Amount	Match Expended Current Period	$ Amount	% Amount
Personnel (Salary + Fringe + Consultants + Office & Admin)	**$0**	**$0**	%	**$0**	**$0**	%
Salary	$0	$0	%	$0	$0	%
Fringe	$0	$0	%	$0	$0	%
Consultants	$0	$0	%	$0	$0	%
Office & Admin	$0	$0	%	$0	$0	%
Other (Equipment+ Travel + Contracts + Other + Indirect)	**$0**	**$0**	%	**$0**	**$0**	%
Equipment	$0	$0	%	$0	$0	%
Travel	$0	$0	%	$0	$0	%
Contracts	$0	$0	%	$0	$0	%
Other	$0	$0	%	$0	$0	%
Indirect	$0	$0	%	$0	$0	%
Totals:	$0	$0	%	$0	$0	%

If the side panel shows a **(!)** for either of the forms, visit the form and fix the error indicated by the system. Expense reports or any other forms cannot be submitted with errors.



Submitting Expense Reports

After a user has initiated an expense report, filled it out to their satisfaction, and is ready for MOVA to review, they will have to submit their report. To move to the next step of the process, the user will need to select **Expenditure Report Submitted** and confirm the status change. In the lefthand panel under the heading **Status Options**, there will be the option to submit close to the bottom of the menu.



Clicking on **Expenditure Report Submitted** will bring up a window and allow the user to enter comments about this submission or just click **OK** to confirm submission for MOVA's review and approval.

Expenditure Modifications

During MOVA's review, we may require more information from your organization on this expense report. If that happens, MOVA will push the status of this report to **Expenditure Report Modifications Required**. This will send out a notification email to relevant users, requiring follow-up. After completing the edits, resubmit this document utilizing the **Status Options** in the lefthand panel.

Notifications

Certain users will receive notification emails upon different status changes. Using the expense report process as an example, Agency Administrators and Fiscal Contacts will receive an automatic email from the eGrants system when the expense report is submitted for MOVA's review and when the expense report has been pushed back to the grantee for updates or more information.

Other Grants Administration Processes

There are a number of grants administration processes that will function the same way. They are: Programmatic Change Requests, Requests to Exceed Standard Consultant Rate, Staffing Updates, Sub-Contract Requests, Volunteer Waiver Requests, Desk Reviews, and Out of State Travel Requests. The steps below will exemplify the process of the Out of State Travel Request, but the aforementioned processes will operate similarly, just with language specific to that process. More information about each of the processes can be found in MOVA's training materials specific to each process.

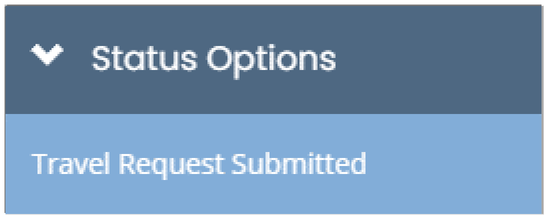
Initiating a New Out of State Travel Request

Once an application/contract reaches the status of **Contract Executed**, the Agency Administrator and Programmatic Contact roles will all have the ability to create a new Out of State Travel Request (OSTR). This process will occur the same way for all MOVA grants.

1) Enter an application/contract
2) Scroll down on the lefthand panel until you reach **Related Documents**
3) Click on the **Initiate Related Doc** button
4) In the **Available Documents** dropdown select the **Out of State Travel Request** option
5) Select the **Create** button
6) User is then taken to the new Out of State Travel Request forms

Submitting a Travel Request

When a user has filled out the form without error and is satisfied with the content, they can submit their request for MOVA's review. To move to the next step of the process the user will need to select the **Travel Request Submitted** selection from the lefthand panel under the heading **Status Options** and select **OK** to confirm submission.



Travel Request Modifications

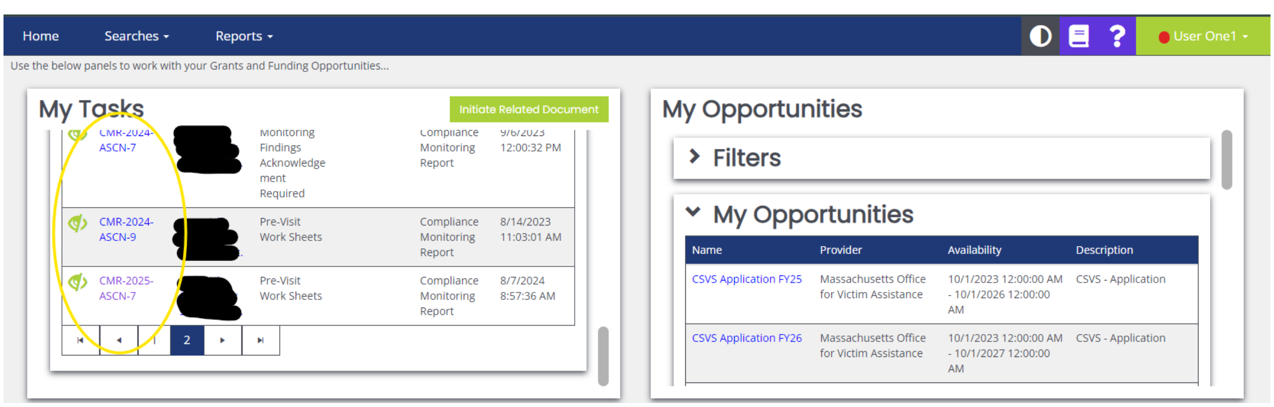
During MOVA's review, we may require more information from your organization on the Out of State Travel Request. If that happens, MOVA will push the status of this form to **Travel Request Modifications Required**. This will send out a notification email to relevant users, requiring follow-up. Once in the Out of State Travel Request, review the **Notes** section of the document to see what other information MOVA may require from you. After completing the edits, resubmit this document utilizing the **Status Options** in the lefthand panel.

Travel Request Notifications

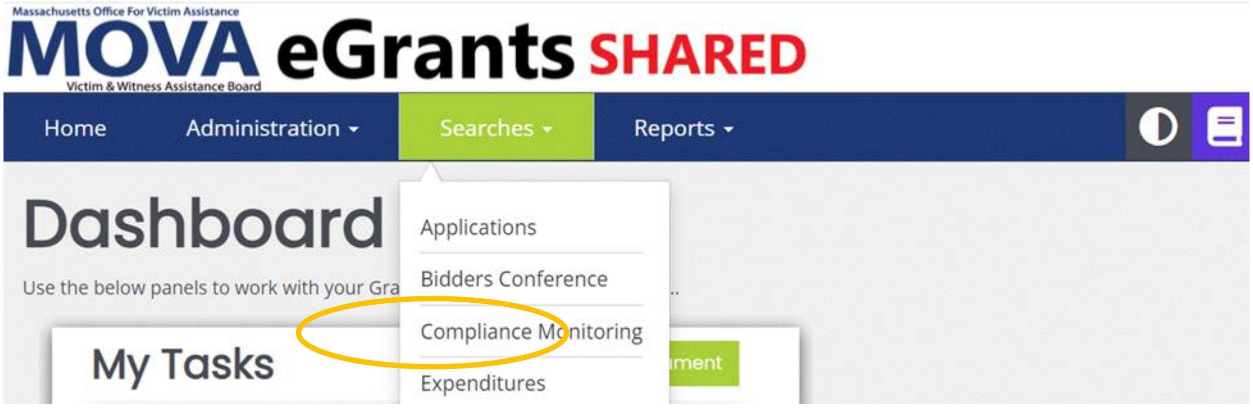
Certain users will receive notification emails upon different status changes. Using the Out of State Travel Request process as an example, Agency Administrators and Programmatic Contacts will receive an automatic email from the eGrants system when the request is submitted for MOVA's review and when the request has been pushed back to the grantee for updates or more information.

Compliance Monitoring

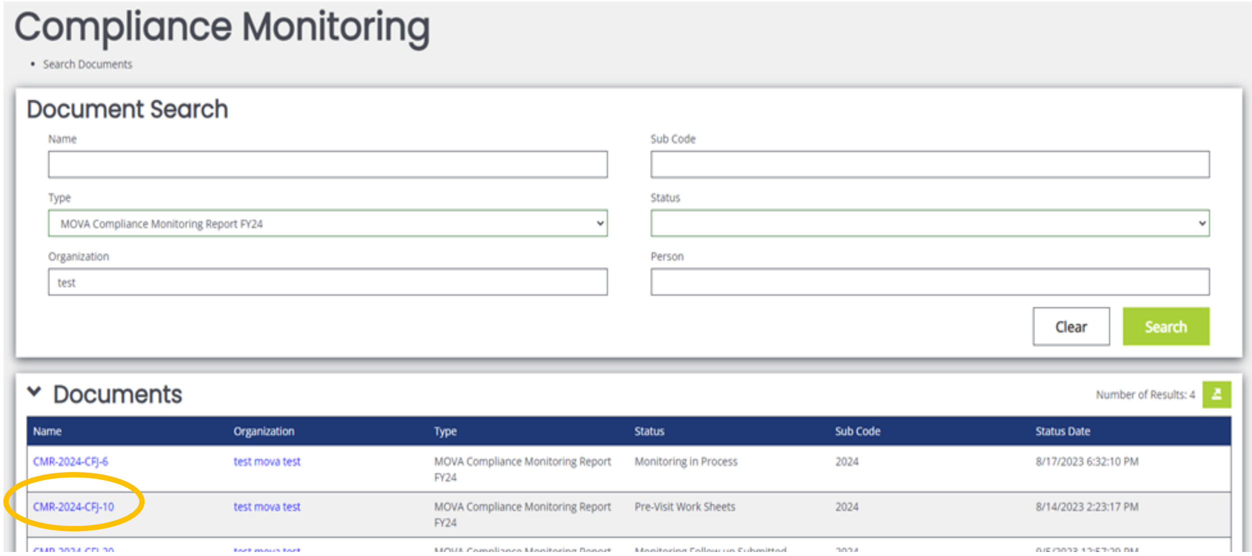
All grantees of MOVA-administered grants will undergo a formal compliance monitoring process with MOVA, also known as a site visit. While the site visit itself will be performed in-person, the pre-visit and post-visit processes will be conducted via eGrants. MOVA may also initiate this process if a compliance issue is identified outside of a site visit process. These instructions have been shortened to include the main steps in the eGrants compliance monitoring process. When a site visit is confirmed, grantees will be sent a full step-by-step guide.



NOTE: If the compliance monitoring report does not appear on the dashboard under My Tasks, it can also be searched for by selecting the searches menu from the top of the dashboard window, opening the dropdown menu, and selecting compliance monitoring. See example below:

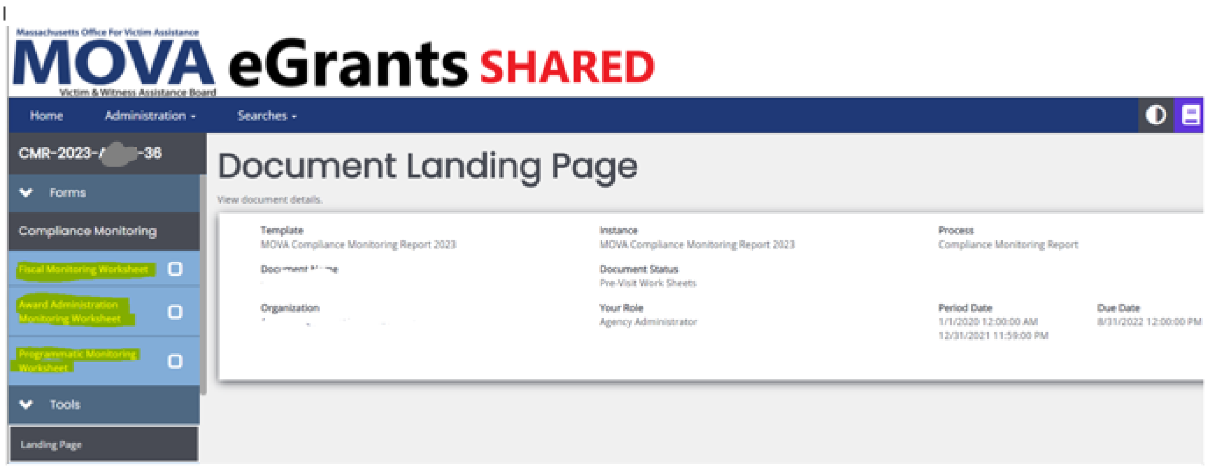


Once the **Compliance Monitoring** search window appears, click the green **Search** button on the bottom right corner, or enter organization name into the **Organization** field and then click the **Search** button. All compliance monitoring processes that are available will appear below the **Document Search** box in the **Documents** section. To select the document, click on the name of the document to open. See example below:



Pre-Visit Worksheets

Once you have accessed the Compliance Monitoring Report, the first step in the process is for you to complete the pre-visit worksheets and submit them to MOVA before the assigned deadline. The three pre-visit worksheets can be seen on the lefthand panel. The **Fiscal Monitoring Worksheet** and **Award Administration Monitoring Worksheet** must be completed. The **Programmatic Monitoring Worksheet** should be reviewed and saved but completion is not required, except for SAFEPLAN programs. For SAFEPLAN, there are specific SAFEPLAN questions at the end of the **Programmatic Monitoring Worksheet** that must be completed. See example below:



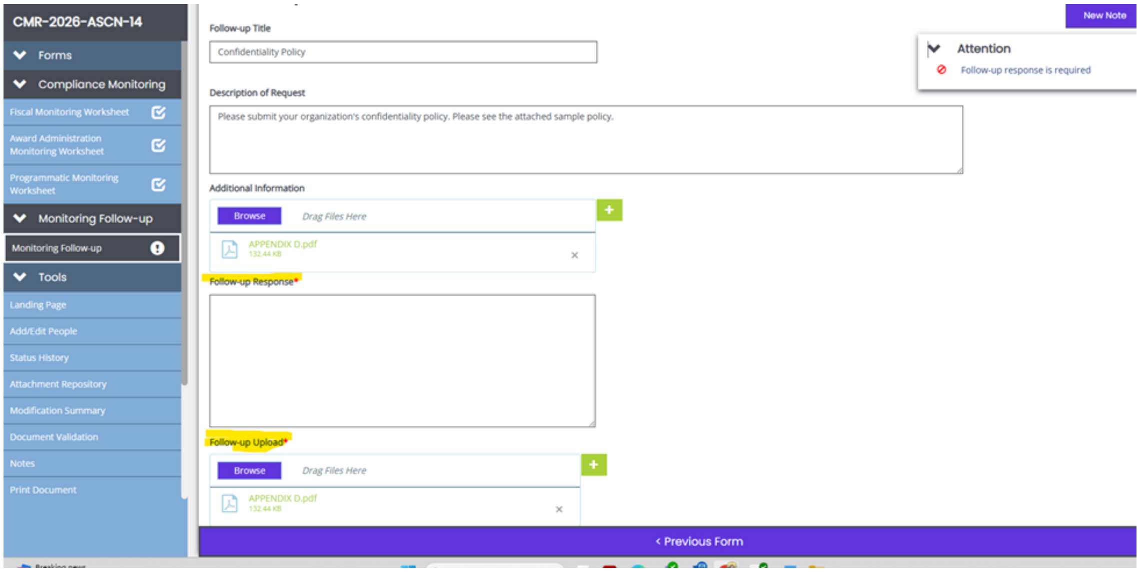
Monitoring Follow-up in Process

Following the in-person or virtual site visit meeting, grantees receive an email notification indicating that the Compliance Monitoring Process has been changed to the status of **Monitoring Follow-up in Process**. This means that there are follow-up items from the site visit that need to be addressed to complete the compliance monitoring process. If there are no follow-up actions required from the site visit, this step will be skipped and the next step in the process will be **Monitoring Finding Acknowledgement Required**. See the **Monitoring Finding Acknowledgement Required** section below.

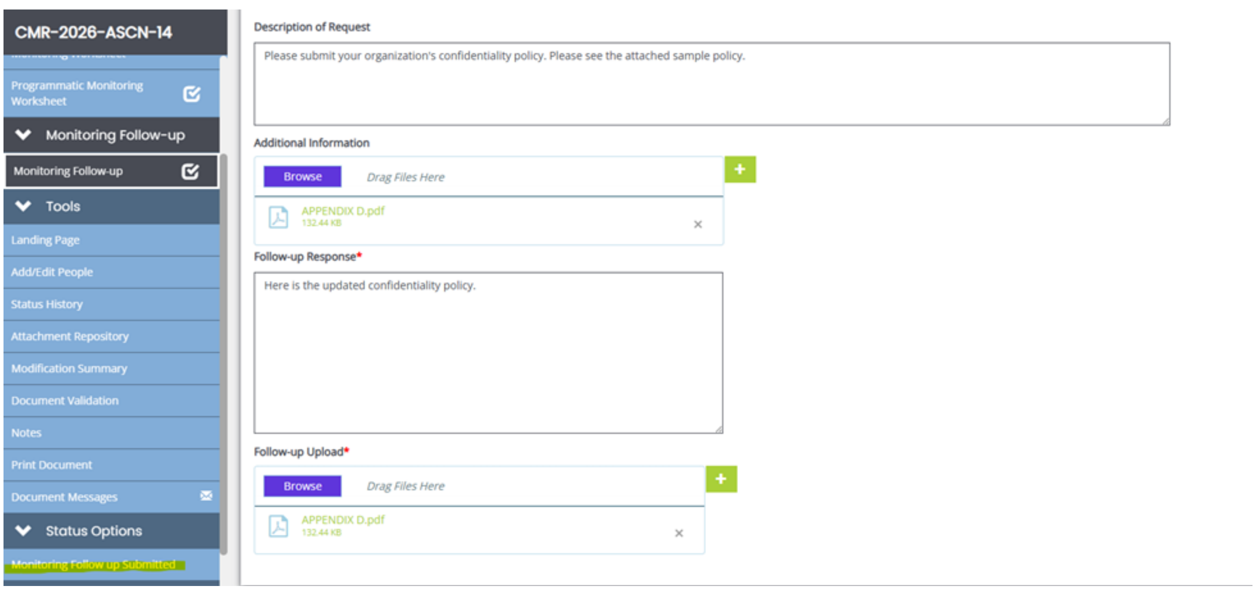
To address follow-up items, log in to eGrants to view the **Monitoring Follow-up Worksheet** detailing what needs to be addressed during the follow-up process. To access the **Monitoring Follow-up Worksheet**, navigate to the Compliance Monitoring Report.

Once the Compliance Monitoring Report has been found, open the document by clicking on the name (CMR-20XX-XXXX-XX). From the **Document Landing Page**, scroll down the menu on the lefthand panel and open the **Monitoring Follow-up Worksheet**. The **Follow-up Title** and **Description of Request** fields describe what follow-up action is needed to address the follow-up items.

To address the follow-up items, please complete the **Follow-up Response and Follow-up Upload** section of the **Monitoring Follow-up Worksheet**. Attachments can be uploaded and attached by selecting **Browse** and attaching a file. See example below:



After completing all follow-up responses and follow-up uploads and saving successfully, navigate to **Status Options** on the lefthand panel and change the status to **Monitoring Follow up Submitted**. See example:



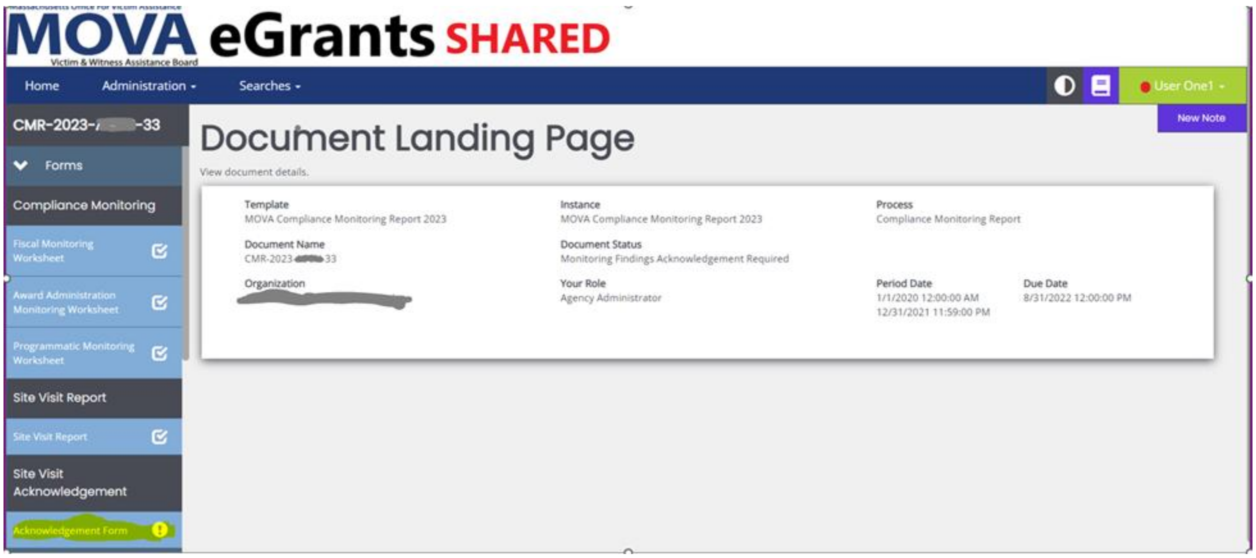
The MOVA administrator will then review the submitted follow-up. This process can be repeated as many times as needed until the follow up period is completed.

Monitoring Acknowledgement Form

Once the monitoring follow-up period has ended, a notification email will be sent to the email addresses associated with the eGrants platform to inform you that the status has been changed to **Monitoring Finding Acknowledgement Required**. This means that MOVA has completed the **Site Visit Report** and **Acknowledgement Form** and both forms are available for you to view and acknowledge on eGrants. To access the **Site Visit Report** and the **Acknowledgment Form**, first log into eGrants. The **Compliance Monitoring**

Report will be available on the **Dashboard** under **My Tasks** or can be searched for using the **Search** function found in the menu across the top of the window. See the previous section on **Pre-Visit Worksheets** for further instructions on how to utilize the search function to find a compliance monitoring report. The status of the report will be **Monitoring Findings Acknowledgement Required**.

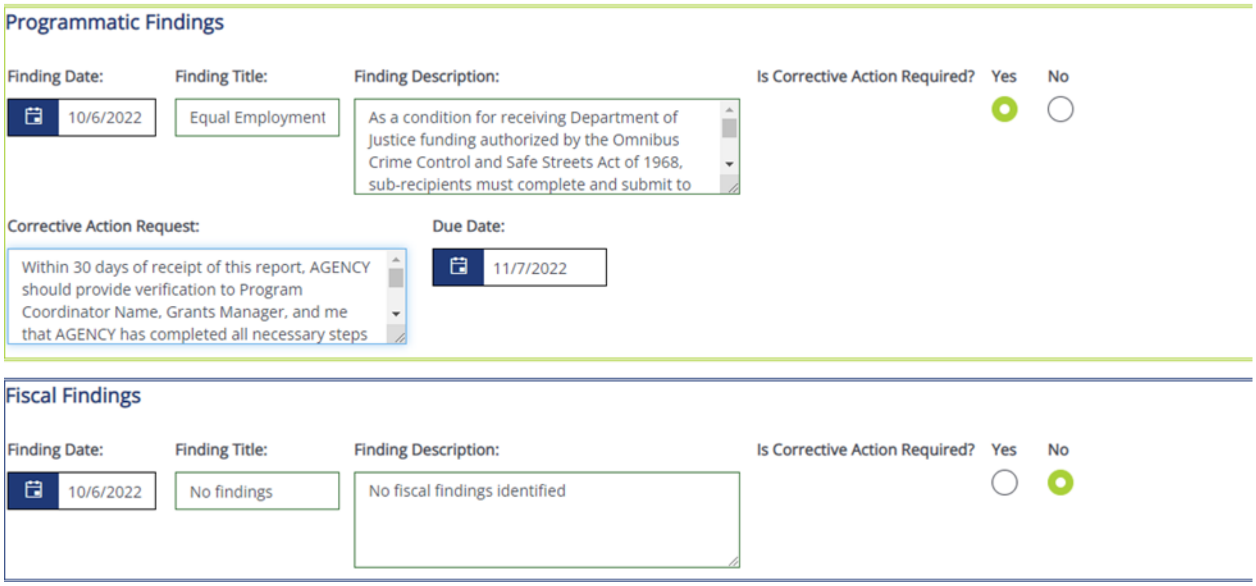
Open the document by clicking on the name (CMR-202X-XXXX-XX). This will take you to the **Document Landing Page**. From the **Document Landing Page**, scroll down the menu on the lefthand panel to see the **Site Visit Report** and the **Acknowledgement Form**. The **Site Visit Report** will be listed on the left side of the page with a checkmark. The checkmark appears next to the **Site Visit Report** because the **Site Visit Report** has been completed and is available for review. The **Acknowledgement Form** will be listed with an exclamation point **(!)** to indicate that it needs to be completed. See example below:



Site Visit Report

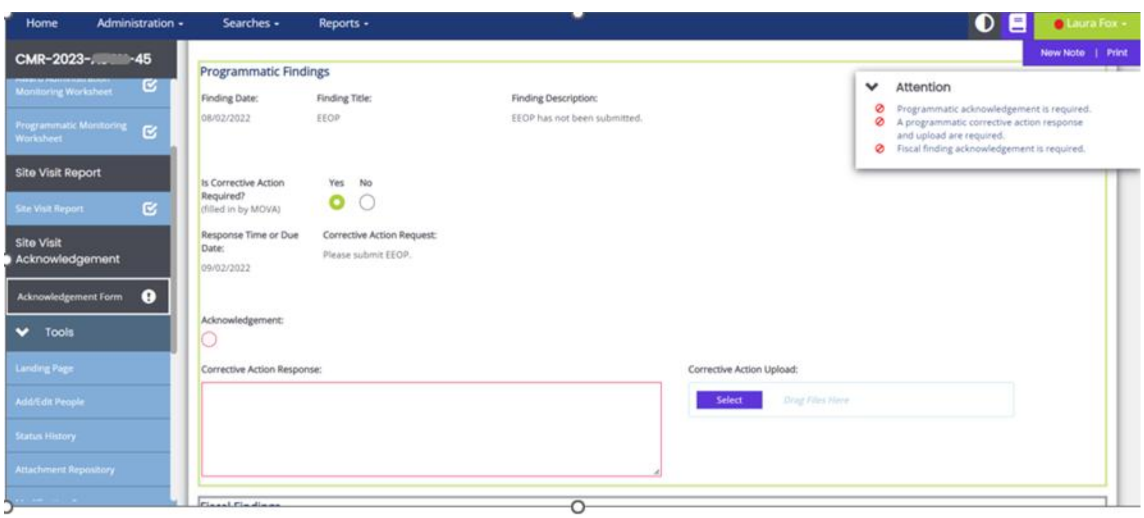
Click on the **Site Visit Report** to review the report and determine whether any findings were identified within the site visit process and, if so, if there are any findings that require corrective action to resolve. All identified findings will be listed within the **Site Visit Report**. There will be a description of the finding in the **Finding Description** field. If no findings were identified during the site visit process, that will be indicated in the findings section of the report. Findings will be separated into two sections: **Programmatic Findings** and **Fiscal Findings**.

If corrective action is required for any finding included in the site visit report that means that there are additional actions that you must take to resolve the identified finding. Any findings with associated corrective actions will have a **Corrective Action Request** field, which will outline the actions needed from the user to resolve the finding, and a **Due Date** field, which is the deadline for completion and submission of the needed corrective action response. See example below from a sample **Site Visit Report**:

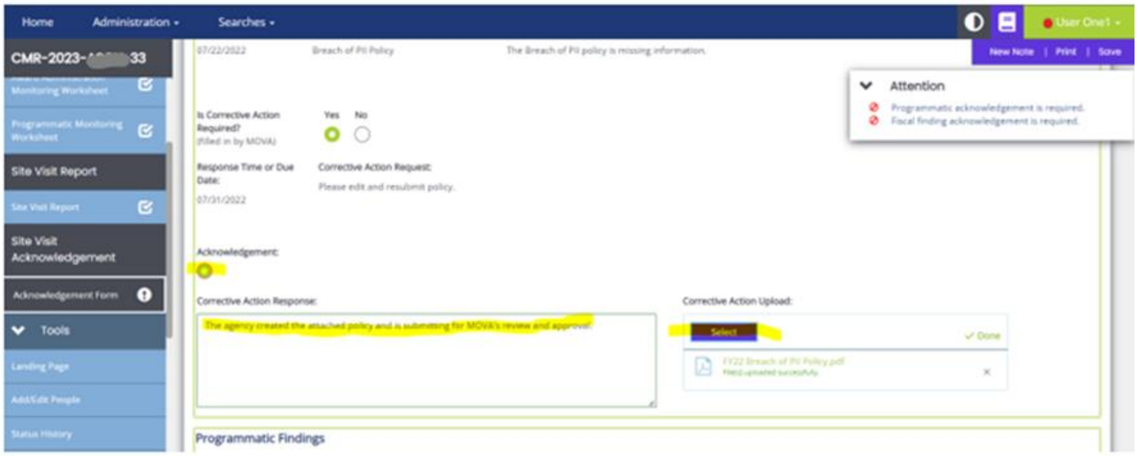


Acknowledgement Form

The **Acknowledgement Form** is a form the user must complete to acknowledge any issues for resolution identified during the site visit and, if required, submit responses to any corrective actions. Select the **Acknowledgement Form** from the lefthand panel to open it. The user should complete all fields within the **Acknowledgement Form** that require acknowledgement and response. In the upper right-hand corner of the form an **Attention** box will provide instruction as to what is required on the form.



If there are issues for resolution noted in the **Site Visit Report**, they will be listed and described in the **Acknowledgment Form**. Use the **Corrective Action Response** field to describe the actions taken to resolve the issues and the **Corrective Action Upload** to submit any requested materials. See example below:



If there are no issues for resolution, or if the items do not require corrective action, the **Acknowledgment Form** must still be completed by clicking on the **Acknowledgment** button, saving, and submitting the form.

Data Processes

There are three data processes that will occur within eGrants. These include the Outcome Measurement Tool (OMT) quarterly, the Subgrant Award Report (SAR) annually and the OMT Goals & Key Outcomes annually.

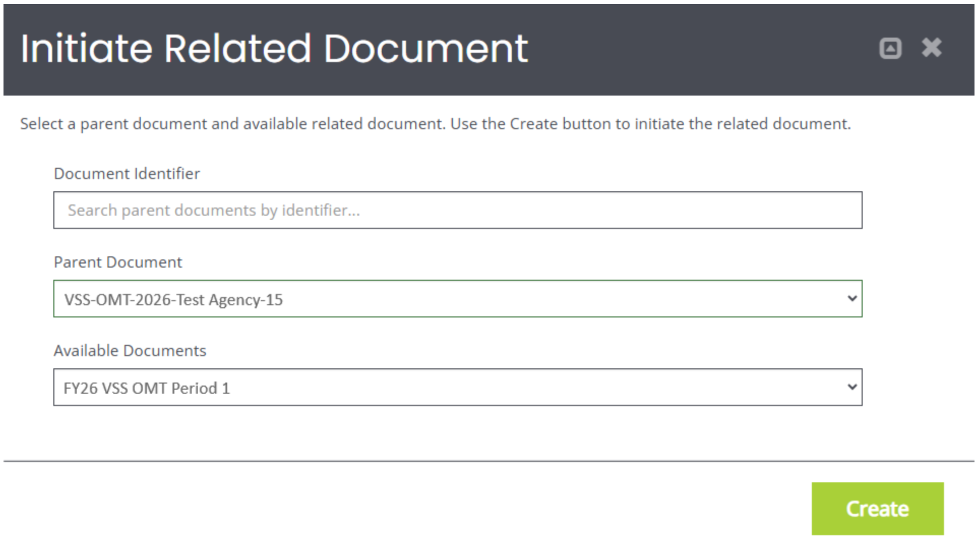
The instructions below will apply to Victim & Survivor Services (VSS) grants, SAFEPLAN grants, and Culturally Specific Victim Service (CSVS) grants. Places where the process differs between the types of grants will be specified. If your organization receives a VSS grant and a SAFEPLAN grant, you will need to complete this process for each grant. More information about each of the processes can be found in MOVA's training materials specific to each process.

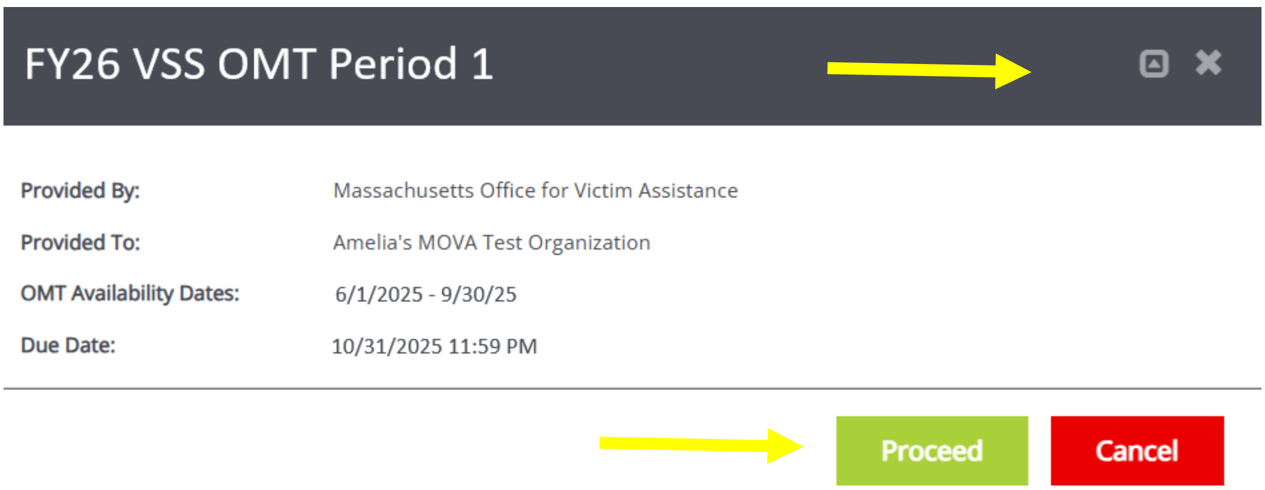
The Outcomes Measurement Tool (OMT)

The Outcome Measurement Tool submission can be initiated as described below. More detailed information about this process is available on MOVA's website.

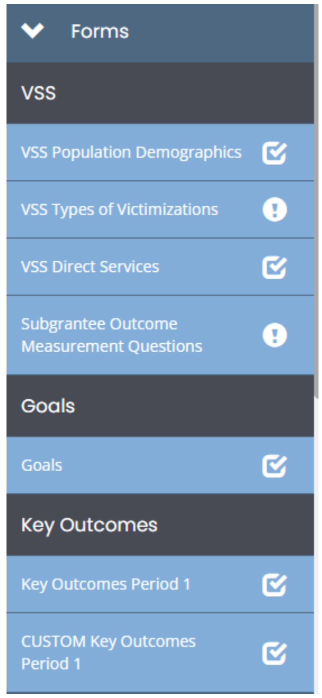
The FY26 OMT can be initiated from the **Dashboard** via the **My Tasks** panel. If the **My Tasks** panel is not visible, refer to the Edit Dashboard section of this document.

Navigate to your eGrants **Dashboard** and click the **Initiate Related Document** button. Here you will select the **Parent Document** (which will be the file name of your FY26 Goals and Key Outcomes). Next, under the **Available Documents** dropdown, you will select the relevant reporting period. Once you have selected the correct information, press the green **Create** button. A pop-up window will appear with information regarding the availability dates and the due date of the OMT. Press the green **Proceed** button. You will now be taken to your OMT file that is ready for data entry.

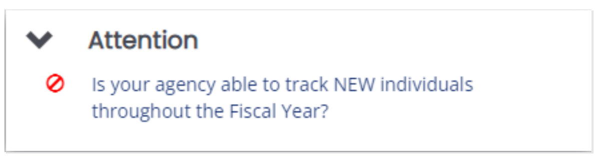




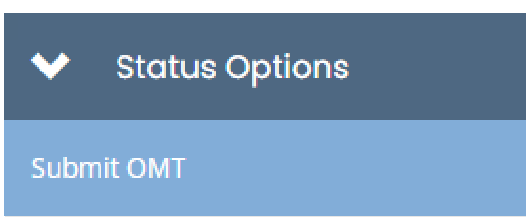
From the landing page, click **Population Demographics** to begin data entry. Fill in all required fields with your organization's data for the quarter. When viewing a quarterly OMT within the eGrants system, you can click through the different sections of the OMT form using the lefthand panel of the eGrants window. Any sections with a checkmark indicate that they are complete. Any section with an exclamation point **(!)** should be viewed, as there is an error that must be corrected. For example, in the image below, the **VSS Population Demographics** and the **Subgrantee Outcome Measurement Questions** sections both contain errors and need to be reviewed.



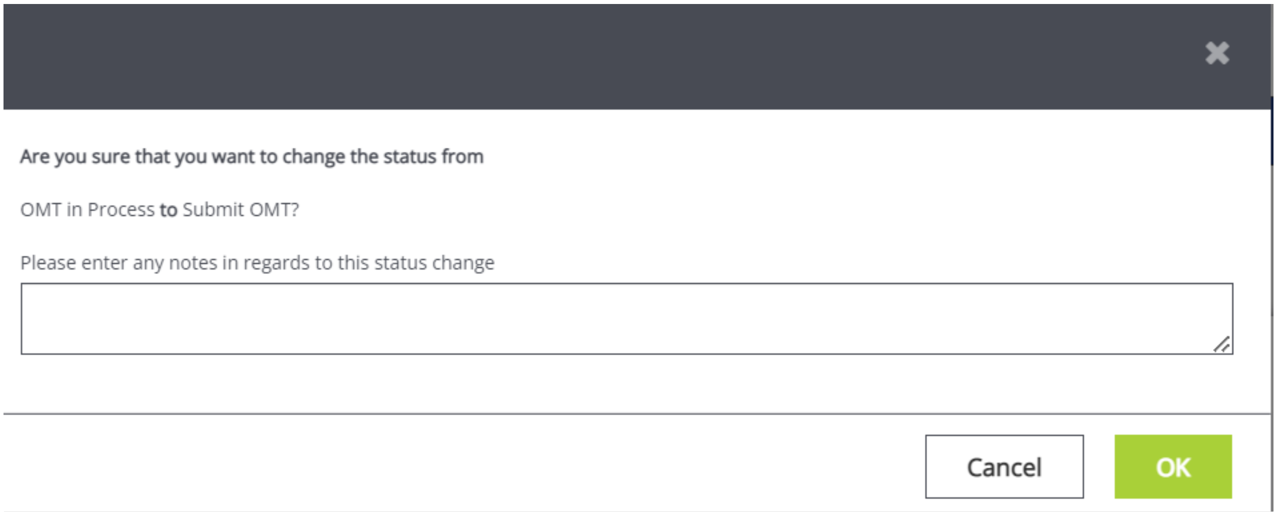
Once a form with an exclamation point is selected from the lefthand panel, you will be taken to that form. Any error messages will appear in box on the upper right-hand corner of your screen. These errors should be corrected prior to saving the OMT form within the eGrants system. Error messages will look similar to the example below.



Once the user is satisfied with all the information in the OMT, and all forms have been saved, scroll to the bottom of the left-hand navigation panel to find the **Status Options**. Select **Submit OMT**. If there are any issues with the OMT, a box will pop up and detail any additional areas that require attention.



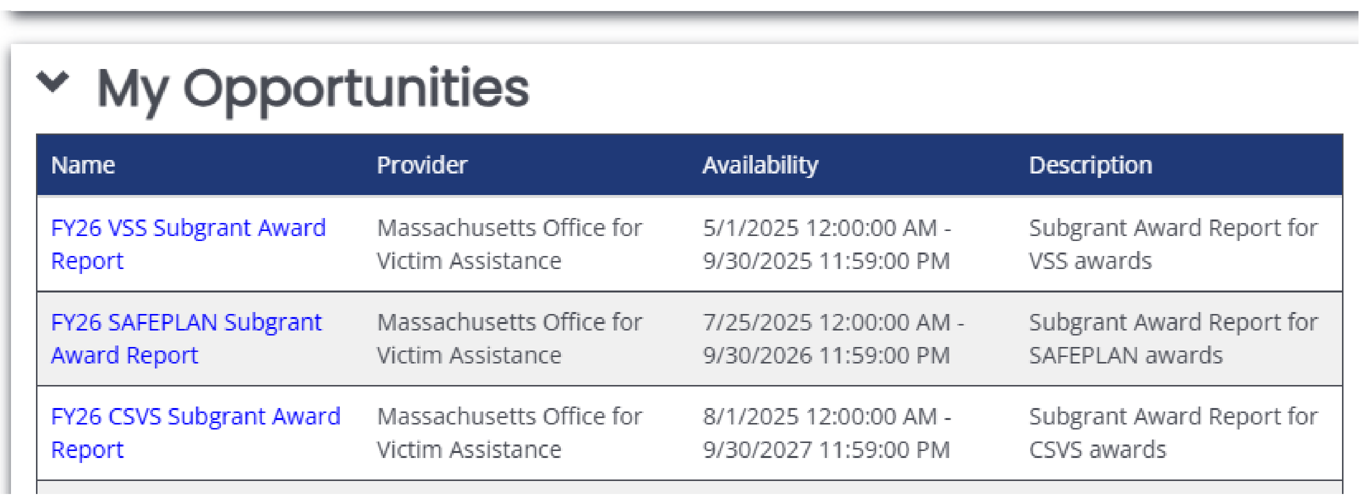
If the OMT is eligible for submission, a box will appear confirming that you want to submit, with additional space for you to write any notes to MOVA. Press **OK** and your OMT will be submitted to MOVA for review.



The Subgrant Award Report (SAR)

The SAR submission can be initiated as described below. More detailed information about this process is available on MOVA's website. The SAR only needs to be completed once per contract period per MOVA-administered grant. For example, if your organization has both a VSS grant and SAFEPLAN grant, you will need to complete a SAR for each. Within the first 3 months of your grant, you will see the Subgrant Award Report appear in your **My Opportunities** section of the dashboard. MOVA will notify you via email when the report is open and when the report is due.

To start your SAR, click on the link from **My Opportunities** depending on which grant you receive. If the **My Opportunities** panel is not visible, refer to the Edit Dashboard section of this document.



My Opportunities

Name	Provider	Availability	Description
FY26 VSS Subgrant Award Report	Massachusetts Office for Victim Assistance	5/1/2025 12:00:00 AM - 9/30/2025 11:59:00 PM	Subgrant Award Report for VSS awards
FY26 SAFEPLAN Subgrant Award Report	Massachusetts Office for Victim Assistance	7/25/2025 12:00:00 AM - 9/30/2026 11:59:00 PM	Subgrant Award Report for SAFEPLAN awards
FY26 CSVS Subgrant Award Report	Massachusetts Office for Victim Assistance	8/1/2025 12:00:00 AM - 9/30/2027 11:59:00 PM	Subgrant Award Report for CSVS awards

Click **Proceed** on the pop-up window when you are ready to begin. You will be brought to a **Document Landing Page** where you can see the status of your SAR. To begin filling out your SAR, click on the first form on the lefthand panel, **Part 1- Victimization Type(s) Served**.

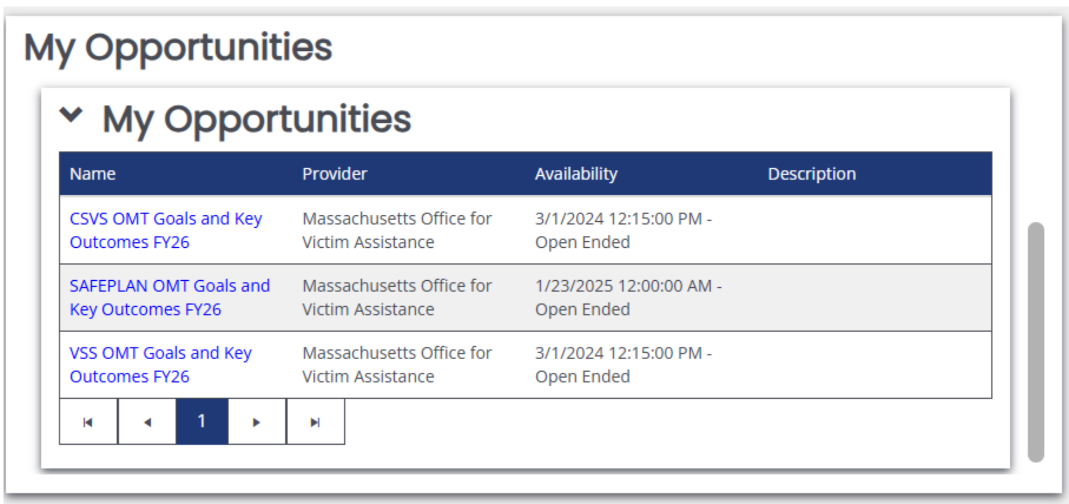
The SAR will be completed and submitted using the same method as the OMT above.

The OMT Goals & Key Outcomes

Goals and Key Outcomes for the FY26 grant cycle will be set by grantee users and approved by MOVA during the contracting process. The instructions below will apply to VSS, CSVS, and SAFEPLAN grants. Places where the process differs between the three types of grants will be specified. You are required to complete this process only for the grants that your organization receives from MOVA. If your organization receives a VSS grant and a SAFEPLAN grant, you will need to complete this process for each. More detailed information about this process is available on MOVA's website.

To initiate the Goals and Key Outcomes form, navigate to the **Dashboard**. Once available, the name of the applicable form will appear under **My Opportunities** as shown below.

If the **My Opportunities** panel is not visible, refer to the Edit Dashboard section of this document.



Click **Agree** on the pop-up window when you are ready to begin. You will be brought to a **Document Landing Page** where you can see the status of your Goals and Key Outcomes. To begin filling out your Goals and Key Outcomes, click on the first form on the lefthand panel, **Goals**.

The Goals and Key Outcomes will be completed and submitted using the same method as the OMT and SAR above.