MOVA eGrants

SUBRECIPIENT 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 new system interface automatically gathers address and contact information during registration and confirms 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, type the following into the address bar of the web browser and press ***Enter***.
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 Sections

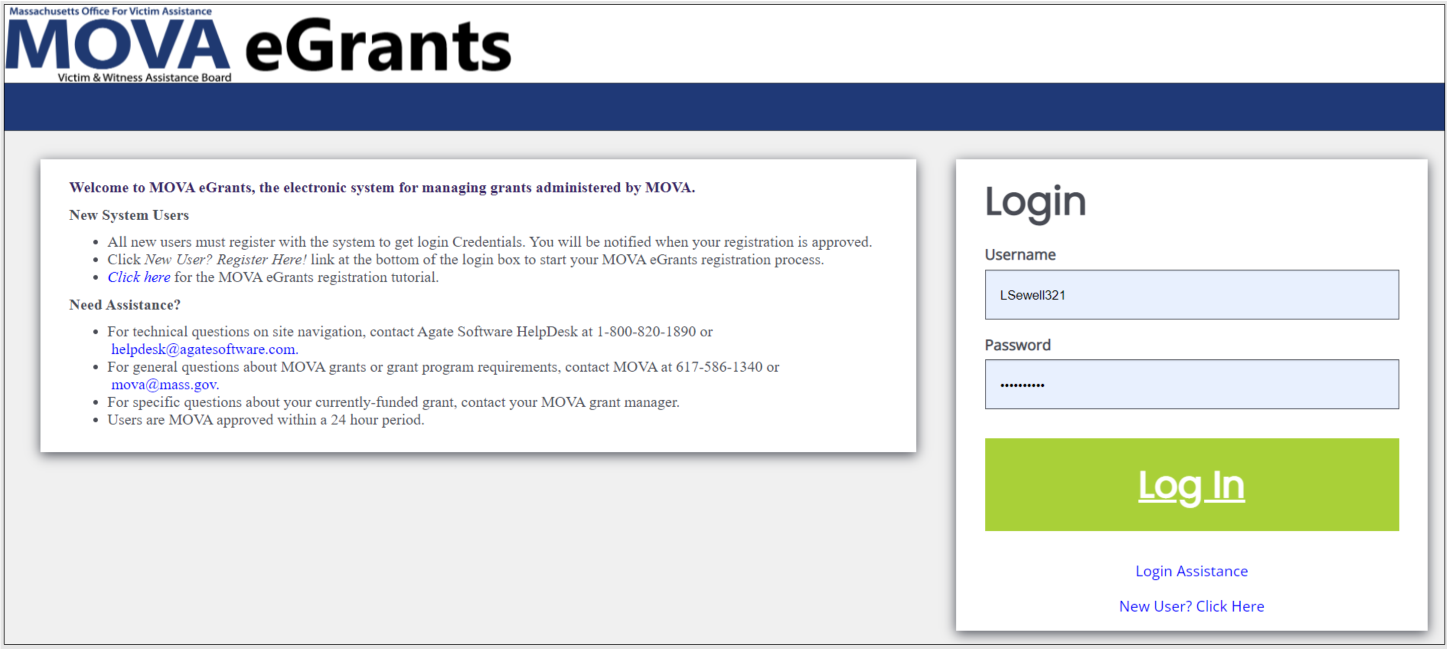


Figure 1 The Login Page

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

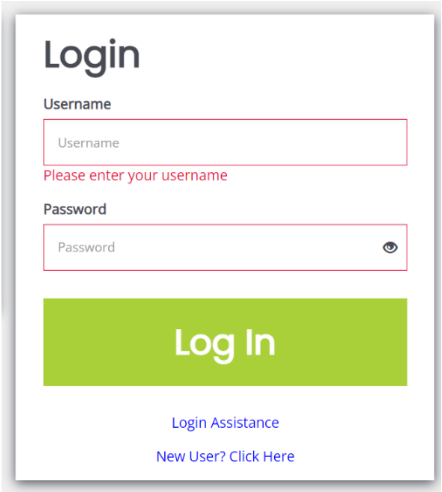
The username is created by the new user during the registration process OR by the user adding this user to the organization. Please see below for more information about adding new users to your organization.

Password

The password is created automatically by the portal once a new user is added OR by the user adding this user to the organization.

Log In Button

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

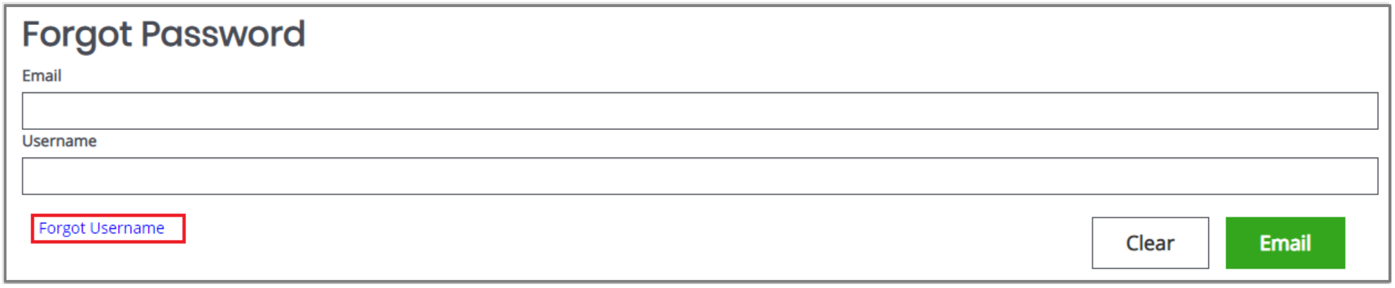


Troubleshooting Issues Logging into the MOVA eGrants Portal

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.



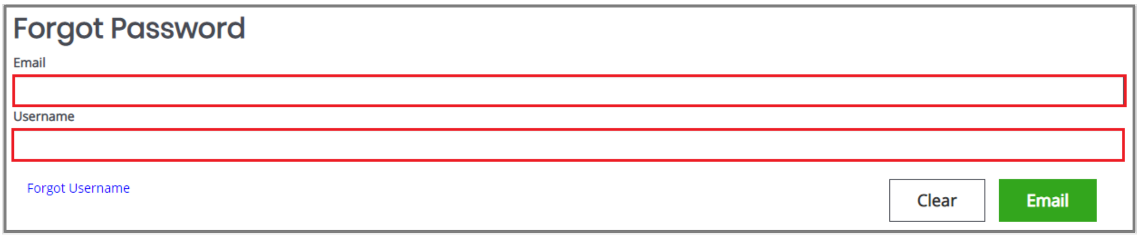
"Locked Out"

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

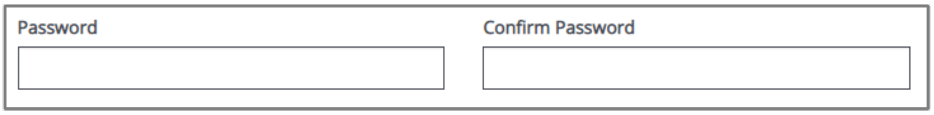
The MOVA eGrants portal allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

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.

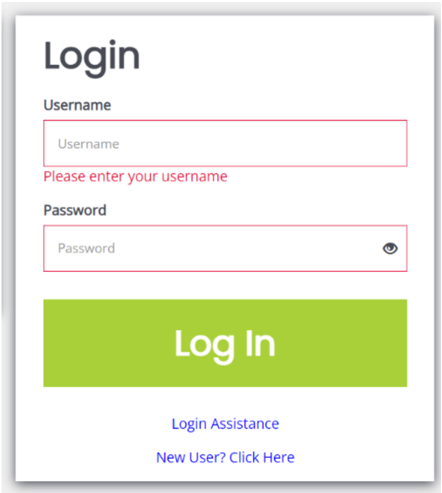
4) At this point, the user will be brought directly to the **Profile** page and prompted to create a new password. The user can use the ***Edit Password*** button at the bottom of the page to update the password. When the user clicks on the ***Edit Password*** button, the **Password** and **Confirm Password** fields are available.



New User

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

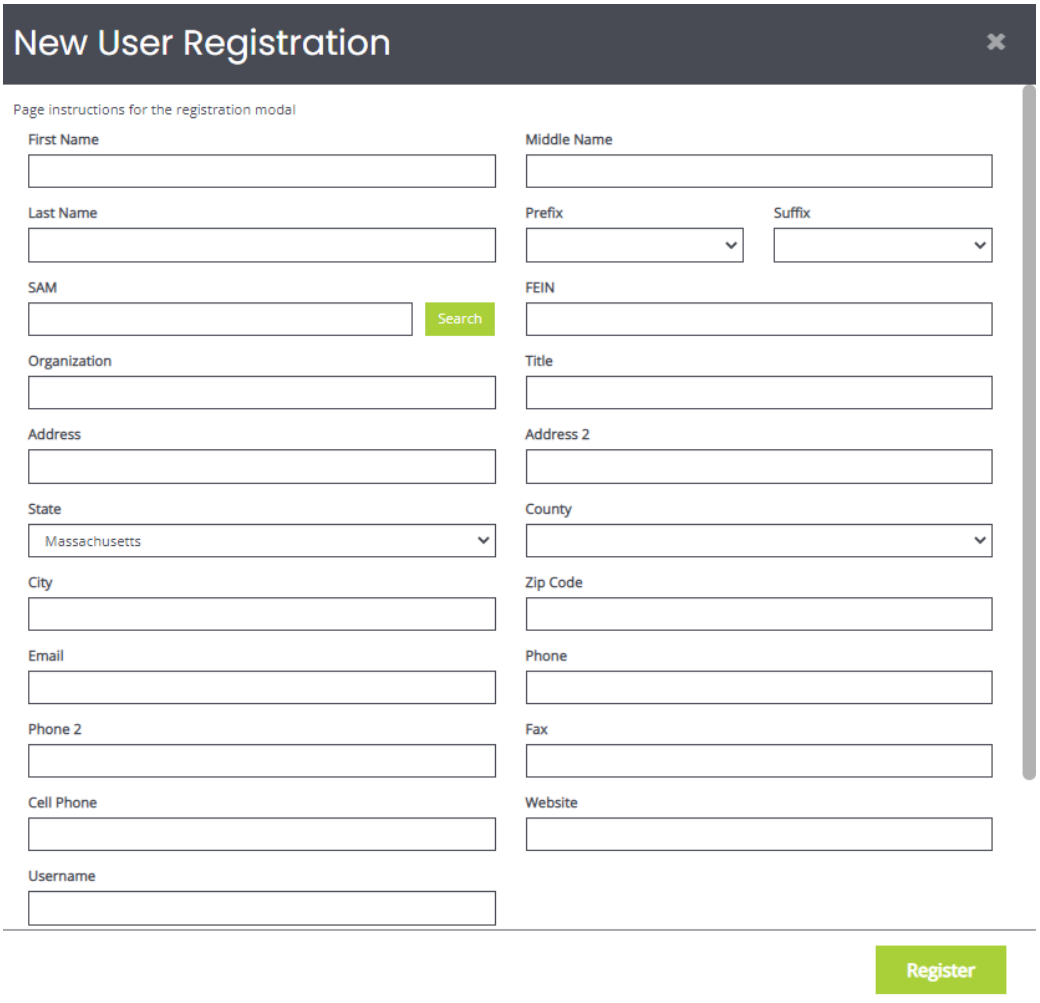
1) Click on the ***New User? Click Here*** link.



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

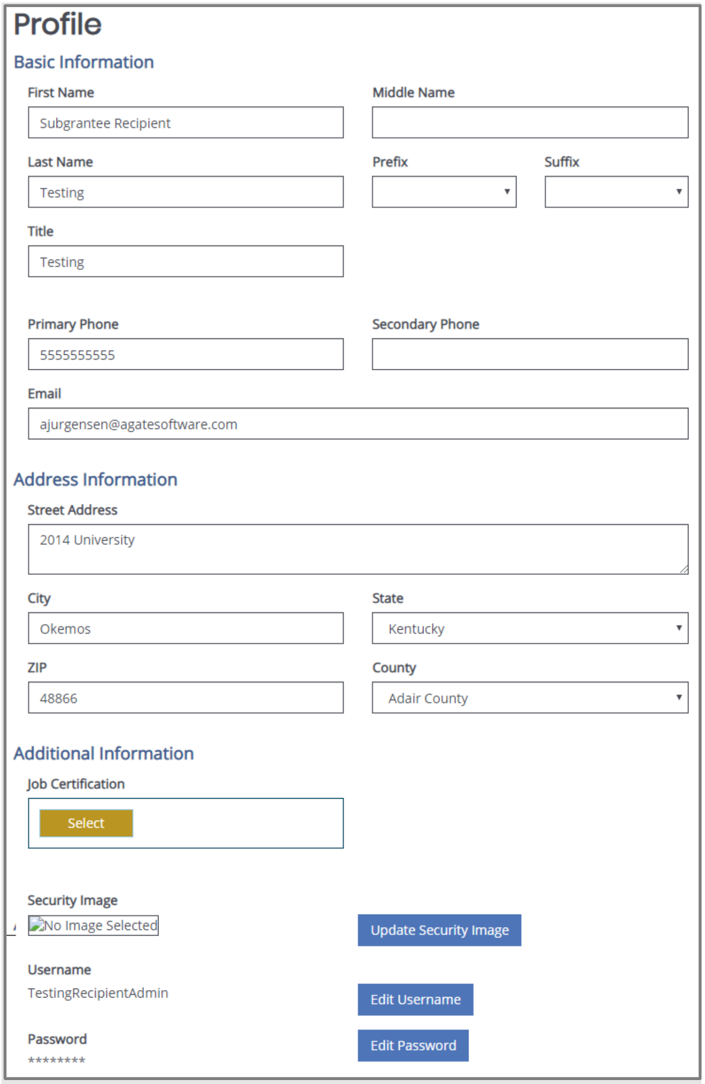
First Name (Required) – the first name of the registering user.
Middle Name – the middle name of the registering user.
Last Name (Required) – the last name of the registering user.
SAM (Required) – the UEI (Unique Entity ID) number for the organization the user is registering with. Enter the UEI number 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.

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 and How to Add a User

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.

New System Roles

Agency Administrator – Manages users and their roles; manages information about the organization; manages assignments of users associated with different Applications and Awards

- *Access to forms: All forms available on eGrants*

Application Submitter – Submits complete Applications on behalf of an Entity

- *Access to forms: All functions of application process*

Programmatic Contact – Manages and submits programmatic requirements of Awards, including submission of performance reports, on behalf of an Entity

- *Access to forms: Performance Reports; Programmatic Change Forms; Consultant Request Forms; Travel Authorization Forms, Site Visit Forms, Outcome Measurement Tool (OMT), and Subgrant Award Report (SAR).*

Alternate Programmatic Contact – Manages and submits programmatic requirements of Awards, including submission of performance reports, on behalf of an Entity (Alternate if the Programmatic Contact is unavailable)

- *Access to forms: Performance Reports; Programmatic Change Forms; Consultant Request Forms; Travel Authorization 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 on behalf of an Entity

- *Access to forms: Expenditure Reports; Budgets, Fiscal Site Visit Forms, Outcome Measurement Tool (OMT), and Subgrant Award Report (SAR).*

Data Contact – manages and submits performance reports on behalf of the Entity.

- *Access to forms: Outcome Measurement Tool (OMT), and Subgrant Award Report (SAR)*

Authorized Representative – Enters into an agreement on behalf of the Entity and binds it to the award terms and conditions

- *Access to forms: ALL forms*

View Only – Can view all forms within organization's profile

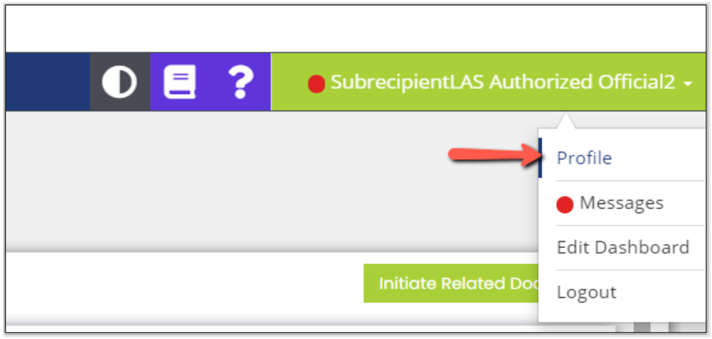
Below is a table that shows which roles can be assigned by the subrecipient. For example, an Authorized Representative can only assign Agency Administrators.

Subrecipient Role	Allowed to Assign
Authorized Representative	Agency Administrators
Fiscal Contact	Fiscal Contact
Agency Administrator	Agency Administrators, Alternate Programmatic Contacts, Application Submitters, Authorized Representatives, Data Contacts, Fiscal Contacts, Programmatic Contacts, View Only
Programmatic Contact	Programmatic Contact, Alternate Programmatic Contacts
Alternate Programmatic Contacts	Alternate Programmatic Contacts

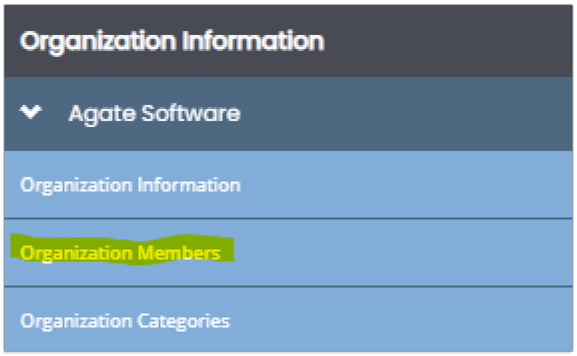
Adding Users to an Organization

To add a user to an organization:

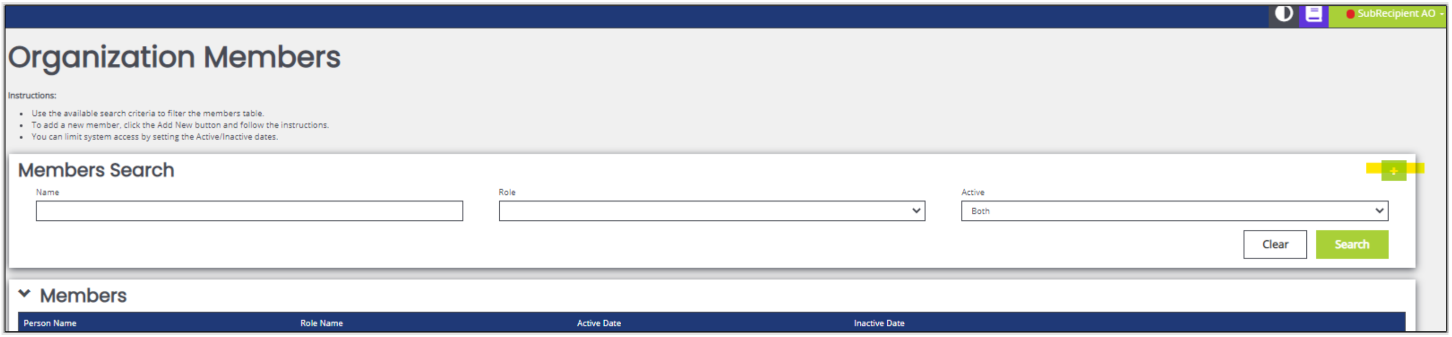
1) Select the logged in user's name in the top right corner.
2) Click *Profile*.



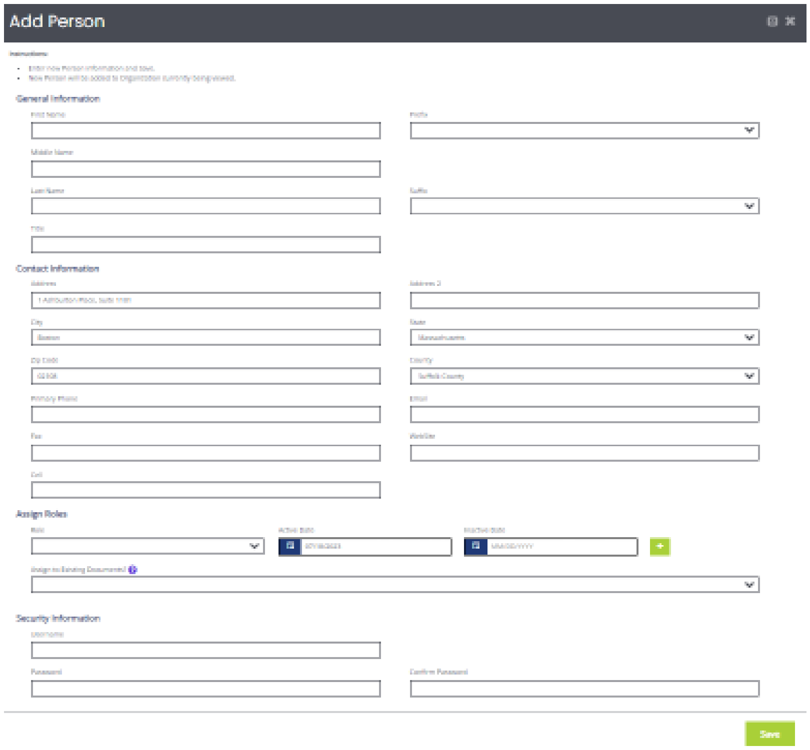
3) Select *Organization Members* under *Organization Information* from the left-hand navigation panel. This will take the user to the *Organization Members* page. Here, they can search for existing members in an organization, view all members within the organization, and add additional members to the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



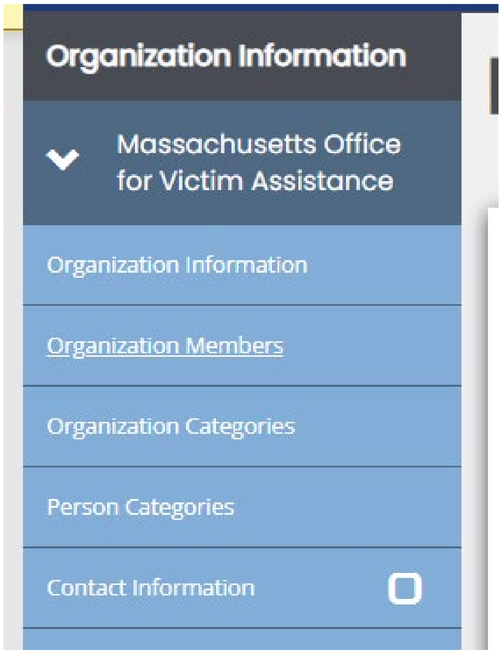
6) After all required fields have been complete, select the green save button in the bottom right to create the new user.
   a) Best practice is to select Yes from Assign to Existing Documents, which will auto-assign the new user to all current relevant documents based on the role. If not selected, then 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.

Organization Information

When a new organization is added to the eGrants system, subrecipient 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 a number of 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 subrecipient 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 subrecipients 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

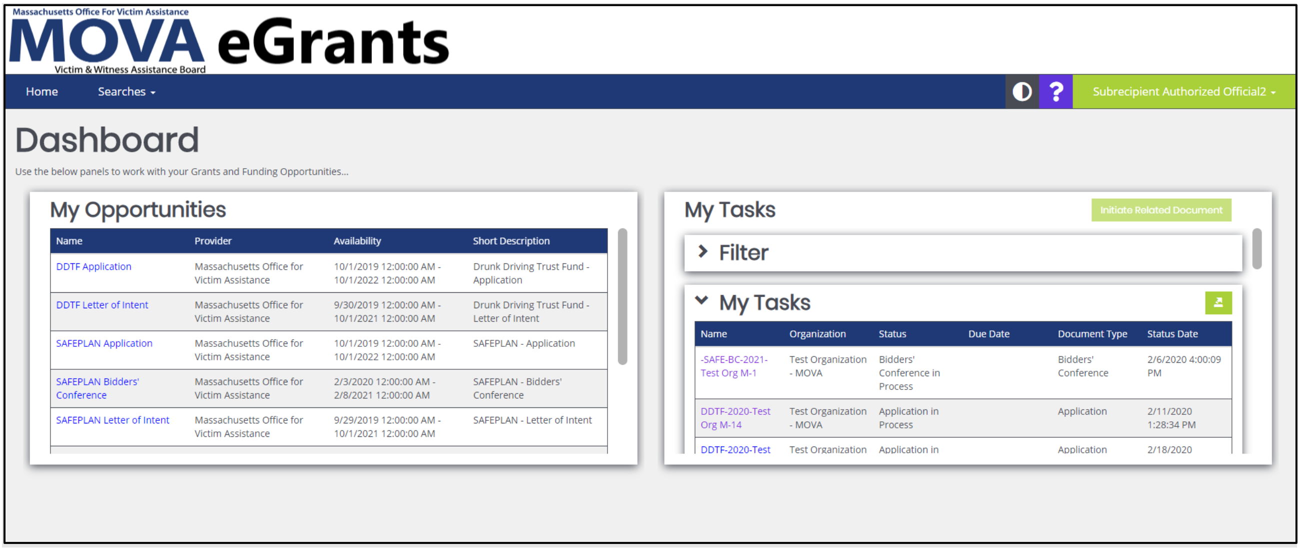
When new organizations are first added to the system, they will also be responsible for filling out the **Contact Information** tab with relevant contact information for the organization's agency leadership, programmatic contact, fiscal contact, contract manager, authorized signatory for the grant, and 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 subrecipient, 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.

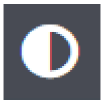
Menu Options

- Recent Documents
- Applications
- Compliance Monitoring
- Expenditures Report
- 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 subrecipients. Some of those reports include but are not limited to the OMT Data Export and the Subrecipient Expenditure Report. Information about each specific report will be shared with subrecipients when the reports are launched. How to use the Reports feature can be found below.

Icons

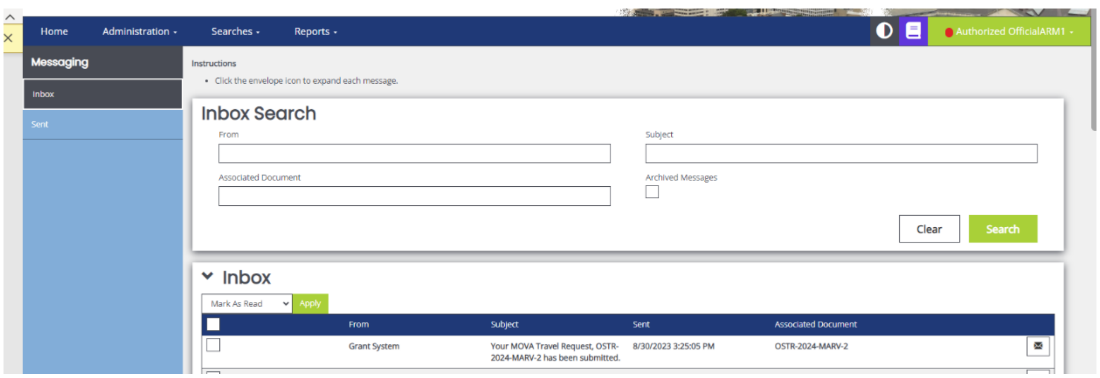
	**Theme Setting**	This button switches the theme visible from black and white to color and vice versa.
	**Training Materials**	Clicking this button will take users to the Subrecipient Manual
	**Help**	Clicking this button allows general help tips to display about the current item selected.
Name		Clicking 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, beginning on page 10.

Messages

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

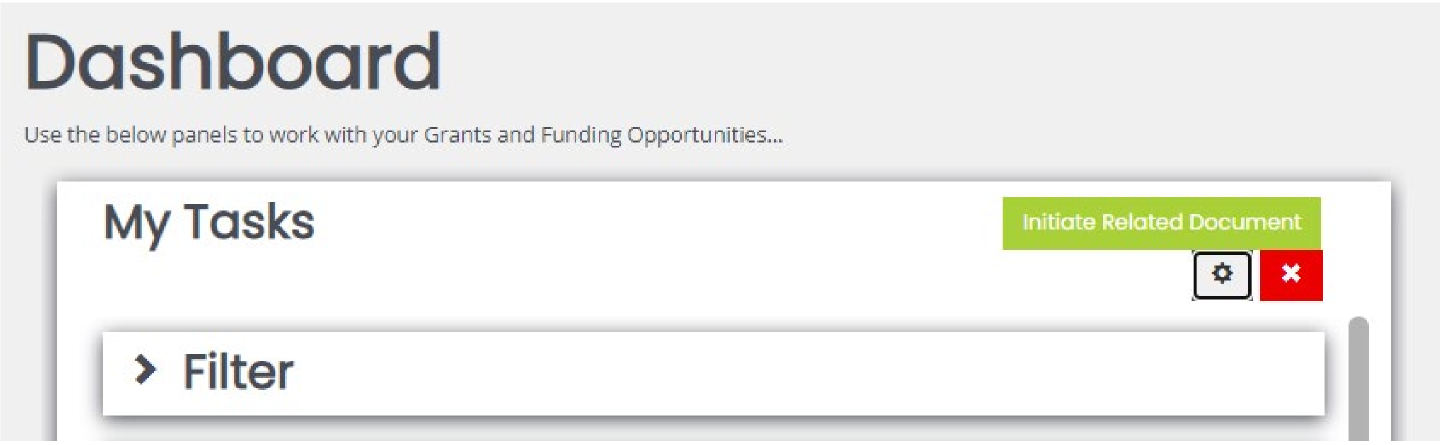


This feature will allow you to see any messages that have been sent to you from MOVA via eGrants. You can use the Inbox Search boxes to filter or you can scroll through your inbox as is. In the lefthand panel, you can see that there are tabs for Inbox—messages received by you via eGrants—and Sent—which 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.

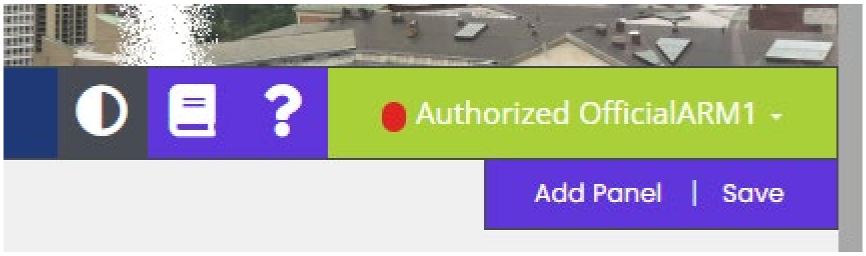
Edit Dashboard

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 subrecipient 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, subrecipients 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.



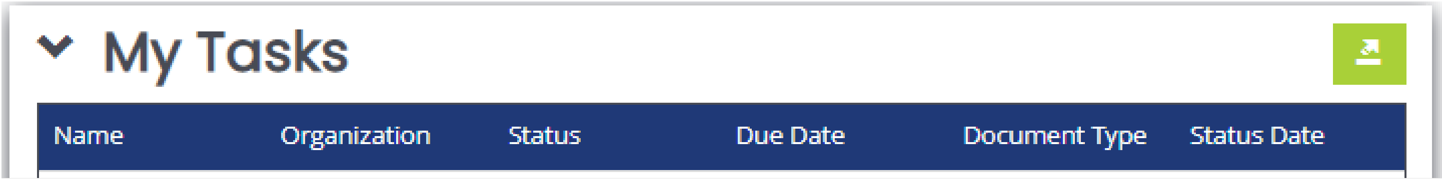
Log Out

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 (like a report or requisition). Your tasks can be organized based on columns by clicking the column title.

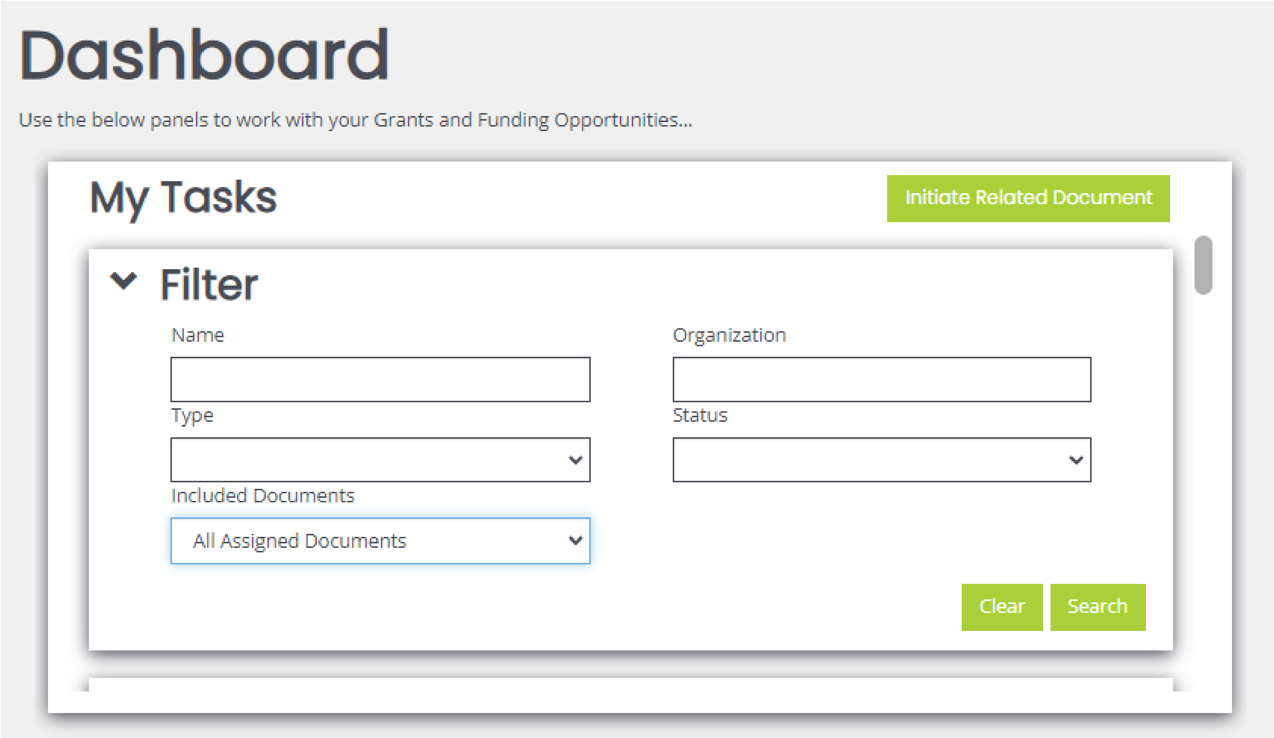


This area can also be filtered using the **Filter** function.

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.

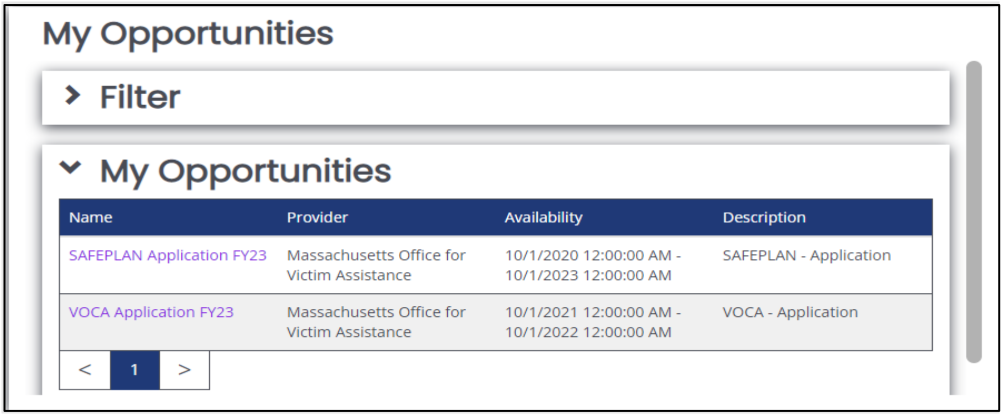
Users also have the ability to hide tasks from view. To hide, toggle the "eye" icon located to the left of the Task. To unhide a task, expand **Filters** from the **My Tasks** dashboard panel. Under the "Included Documents" dropdown, select **Hidden Tasks**. Click **Search**. You can unhide a hidden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

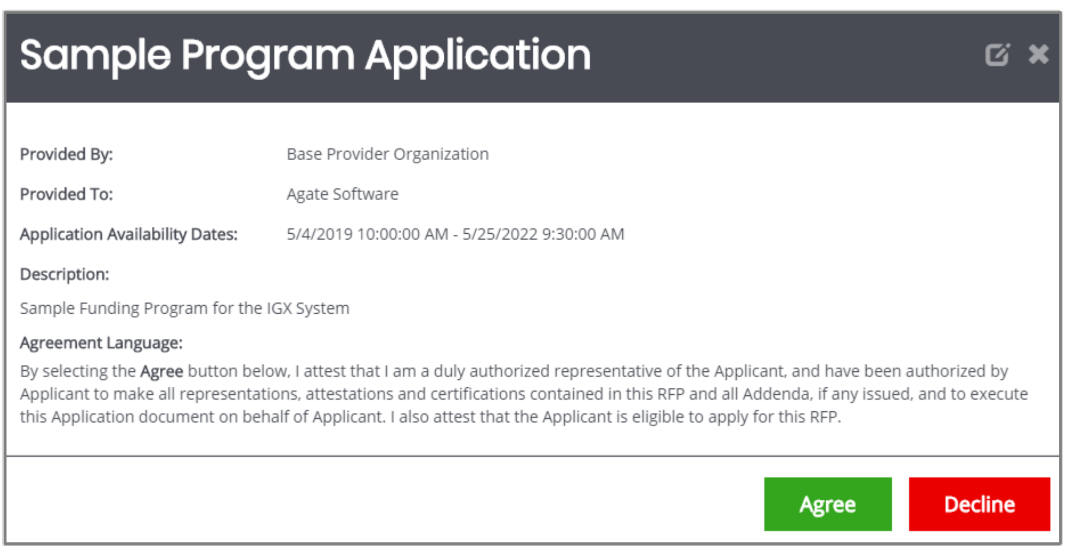


Applications

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.



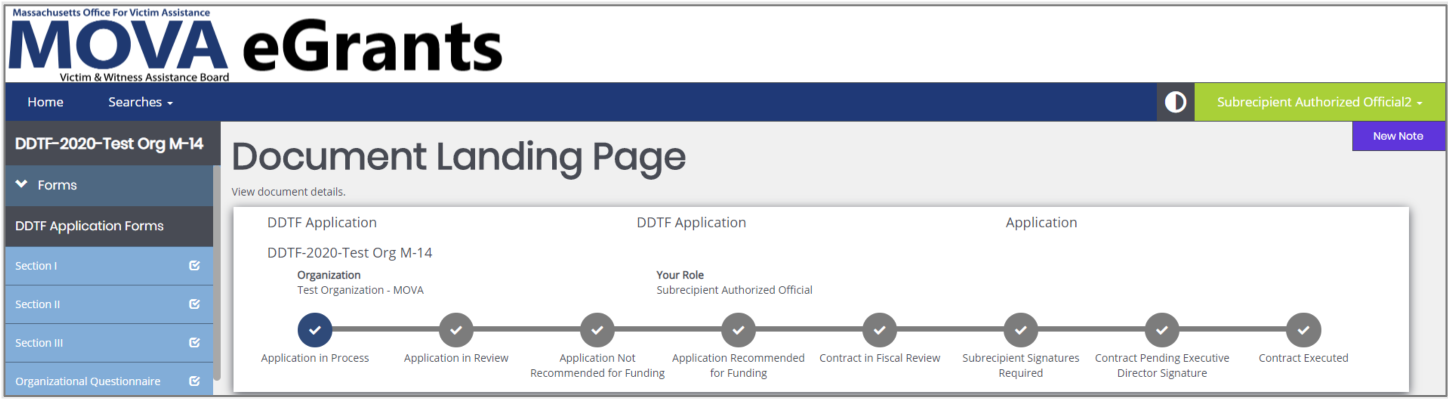
2) Click on the ***Agree*** button.

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

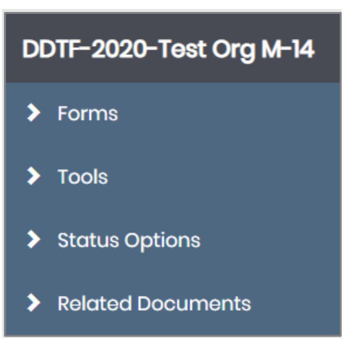
The Document Details section located on the **Document Landing Page** provides visual data including the grant opportunity status, future statuses, the name of the organization, the role of the user currently logged in, and both the **Period Date** and **Due Date**.

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

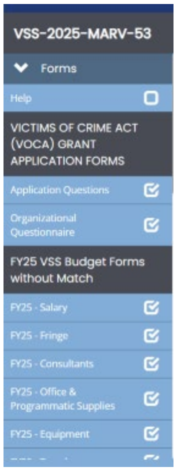
Forms – the list of forms. Usually forms without sections are listed first, then the form list is broken into sections.
Tools – a list of functions available to the user.
Status Options – a list of possible status options to apply to the application. This list will vary from user to user, depending on 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

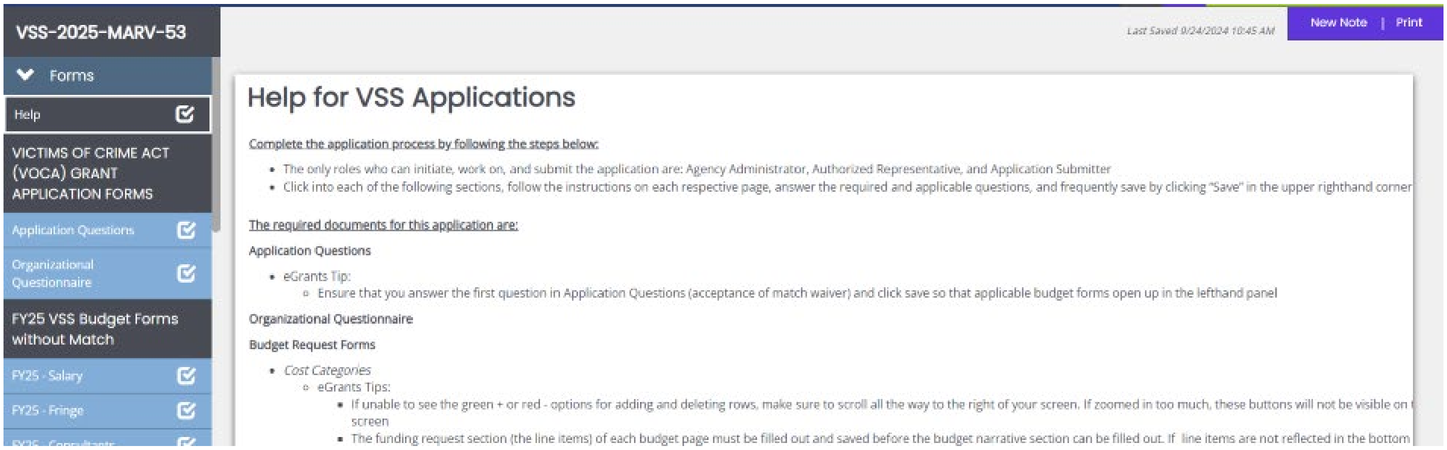
Forms

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 RGA 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.

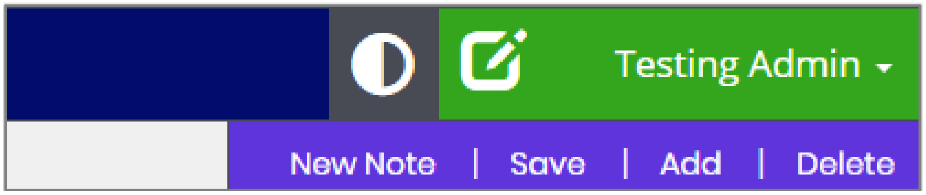


Clicking on a form link in any section will bring up that form. The example listed below is of the Help Page, which will be available for all different forms in eGrants and provides instructions, tips, and resources for the process at hand. The Help Page is not required, nor can it be filled out.



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.

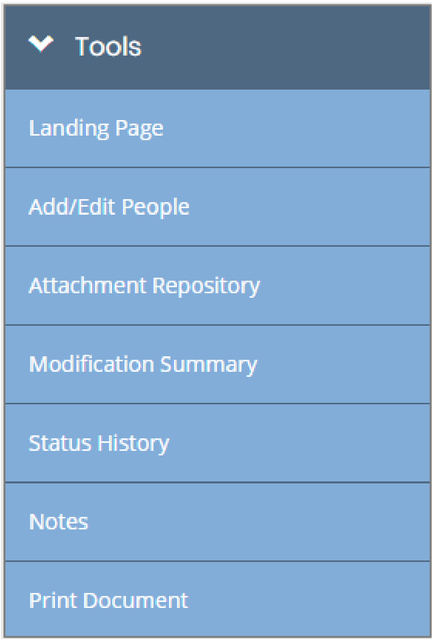


Legend

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.



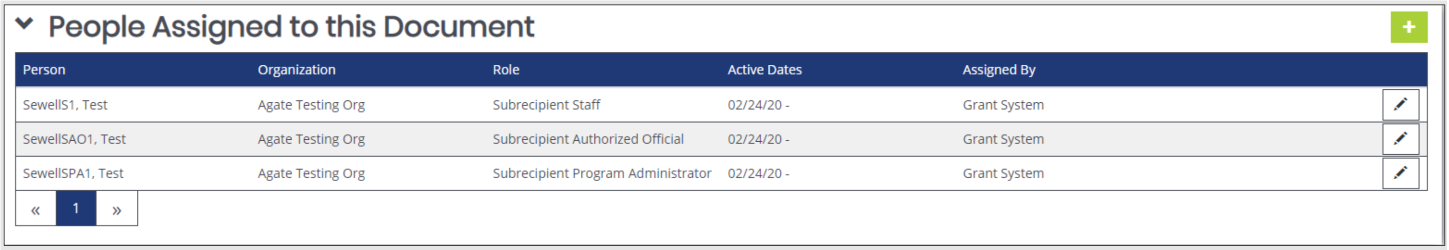
Legend Summary

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.

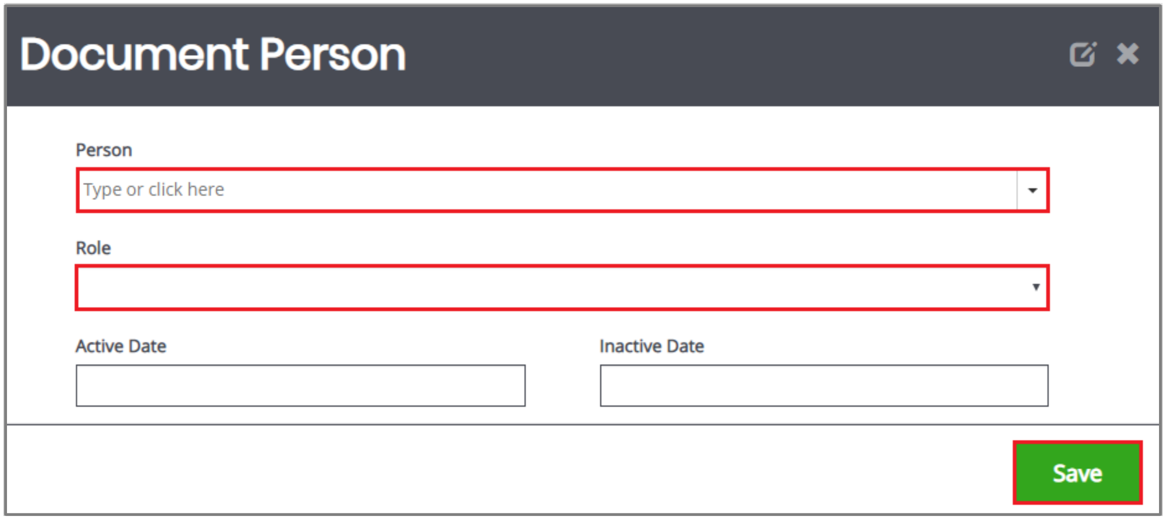
Landing Page
Clicking on this link returns the user to the **Document Landing Page**.

Document Add/Edit People
This tool allows authorized users to add/edit people to the document.

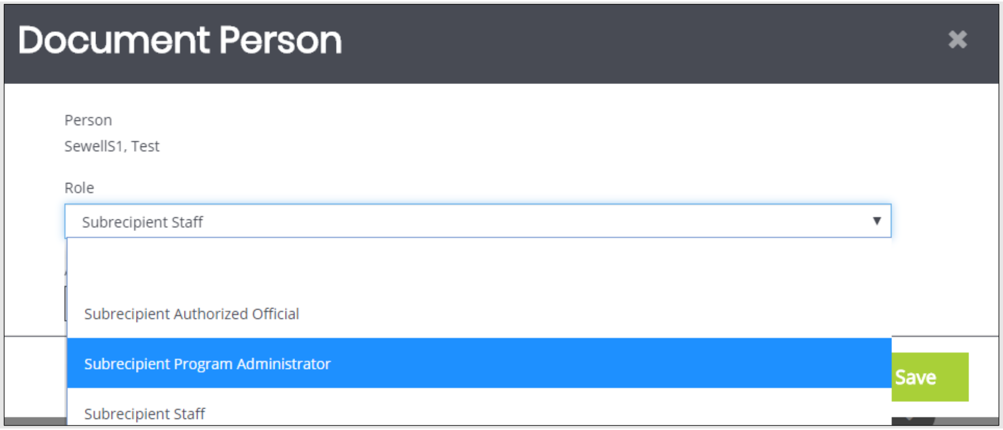

People Assigned to this Document

Person	Organization	Role	Active Dates	Assigned By
SewellS1, Test	Agate Testing Org	Subrecipient Staff	02/24/20 -	Grant System
SewellSAO1, Test	Agate Testing Org	Subrecipient Authorized Official	02/24/20 -	Grant System
SewellSPA1, Test	Agate Testing Org	Subrecipient Program Administrator	02/24/20 -	Grant System

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.

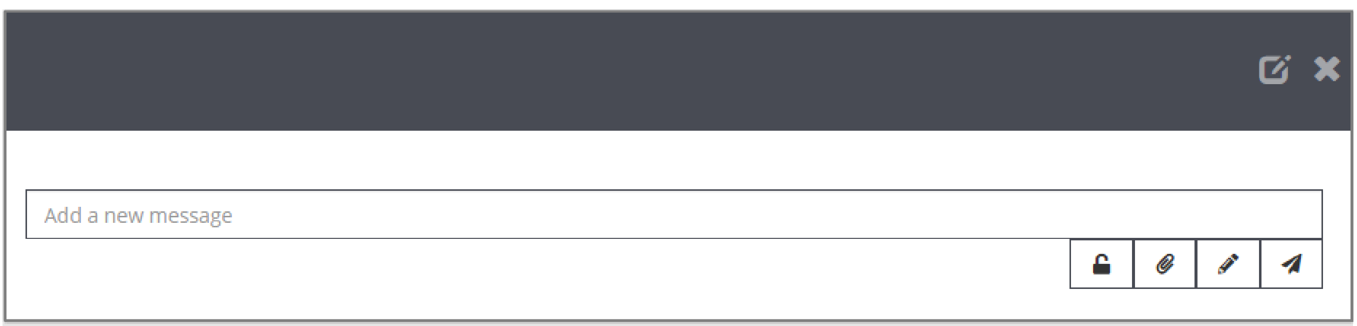


Attachment Repository
This tool allows the user to view files that have been added as attachments throughout the document.

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

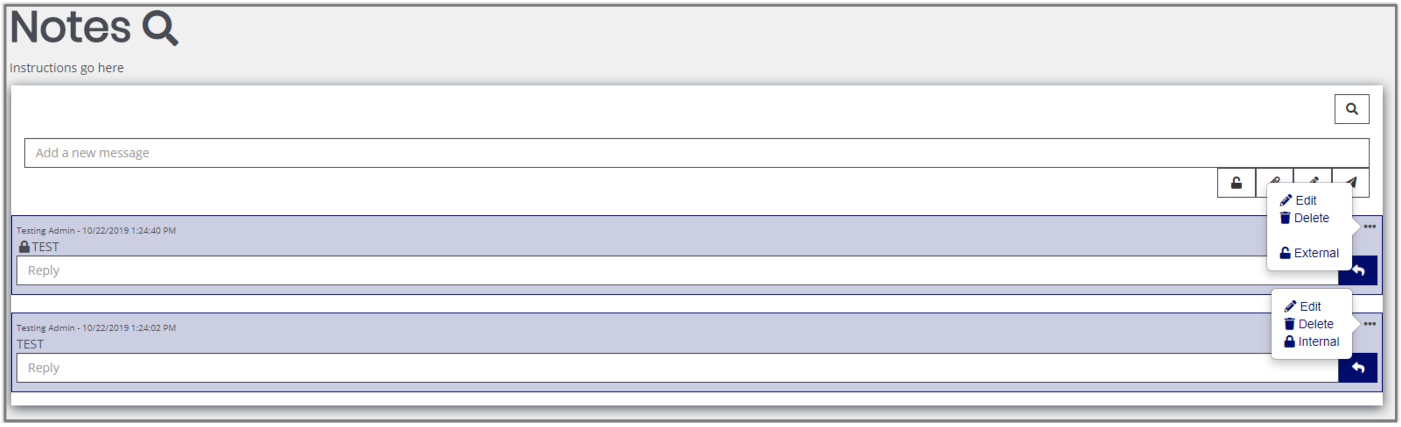
Icon	Name	Description
	Internal Note	This tool locks this note into the form as an internal note. The internal notes are only visible to members within the same organization.

	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

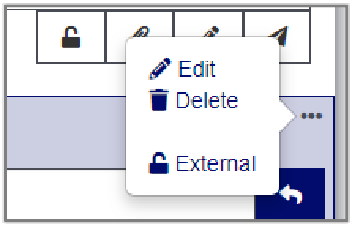
Once a note is created, it ends up in the ***Notes*** area of the **Tools** menu. To access the note, please follow these instructions:

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

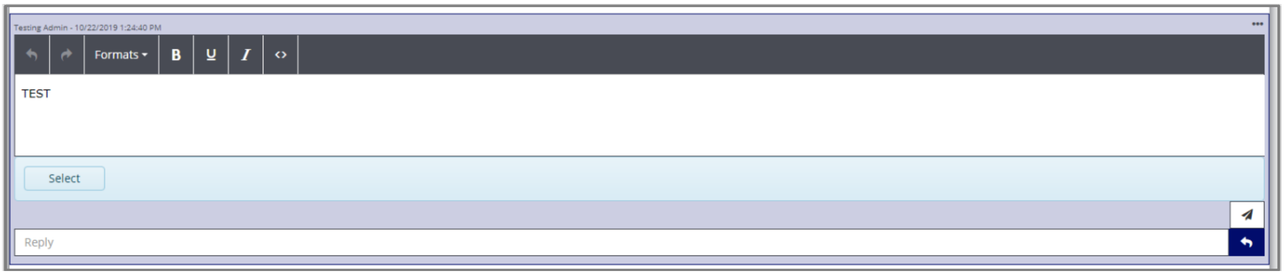


Updating a Note

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.



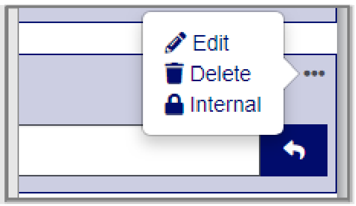
4) Click on the ***Edit*** tool to edit the text field.



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.



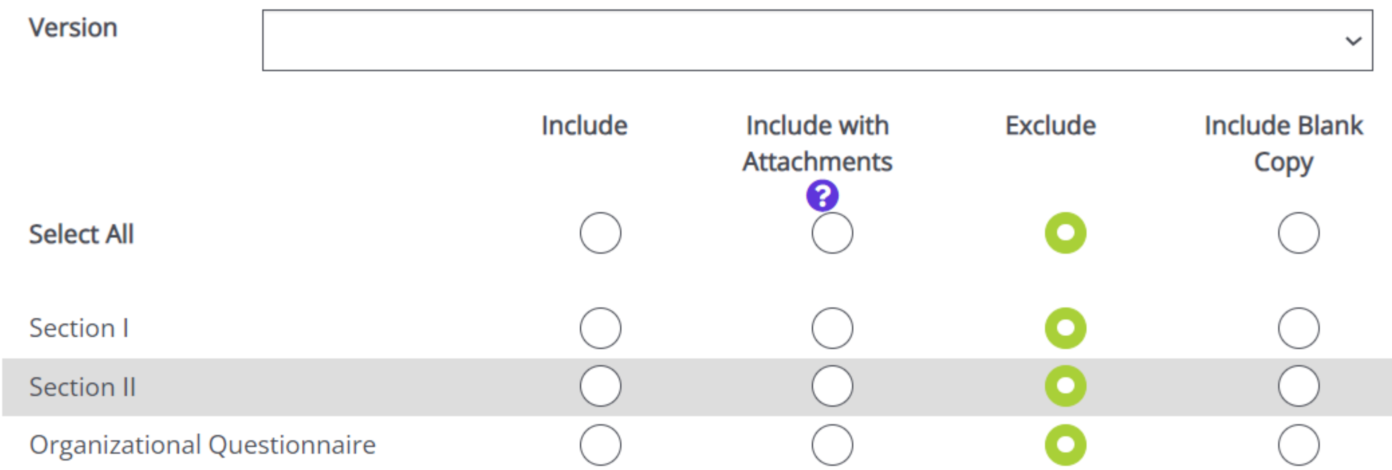
4) Click on the ***Delete*** button to delete the note.

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.

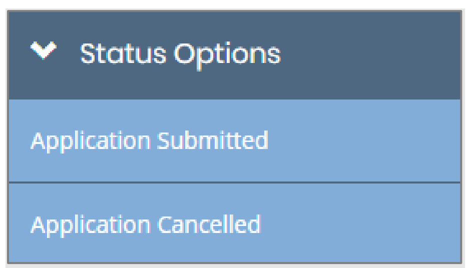
Print Document

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.

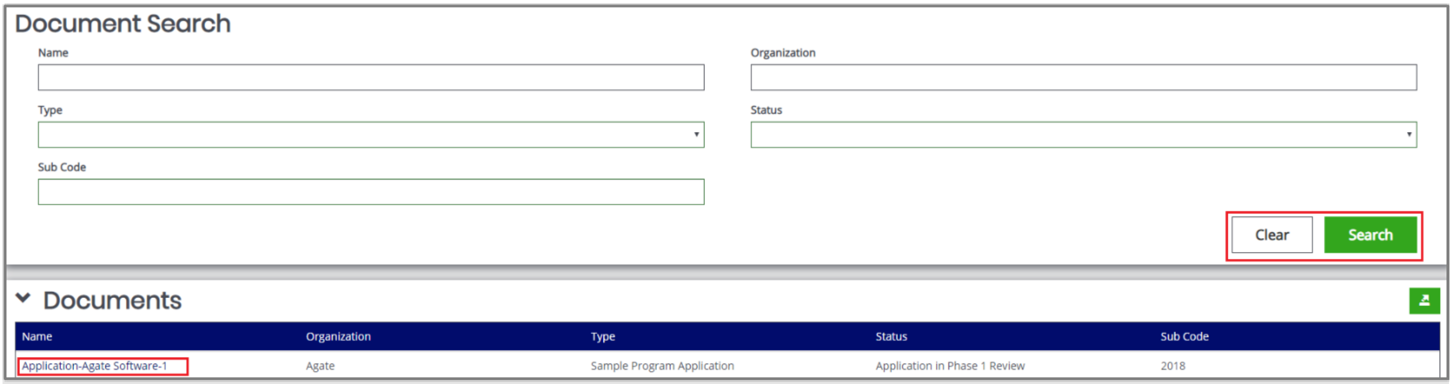
Legend

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: Applications, Compliance Monitoring, Expenditures, OMT, or Out of State Travel Request.

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.



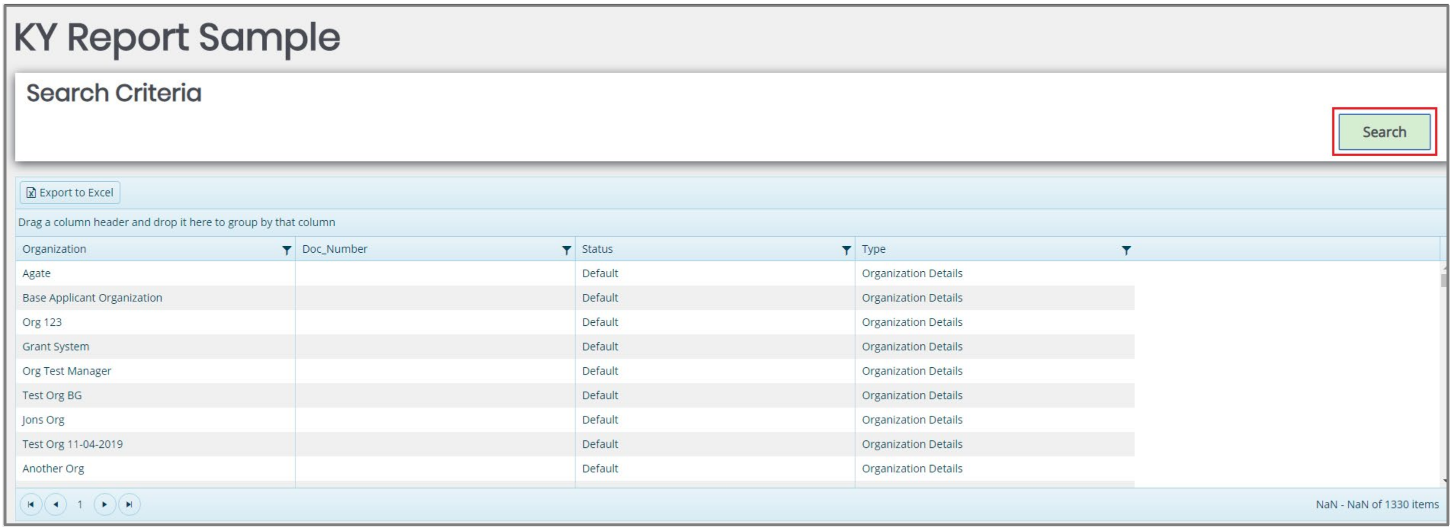
Reports

This tab is used to access reports available to users. The reports and report groups that visible are entirely dependent on what reports and report groups are created.

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.

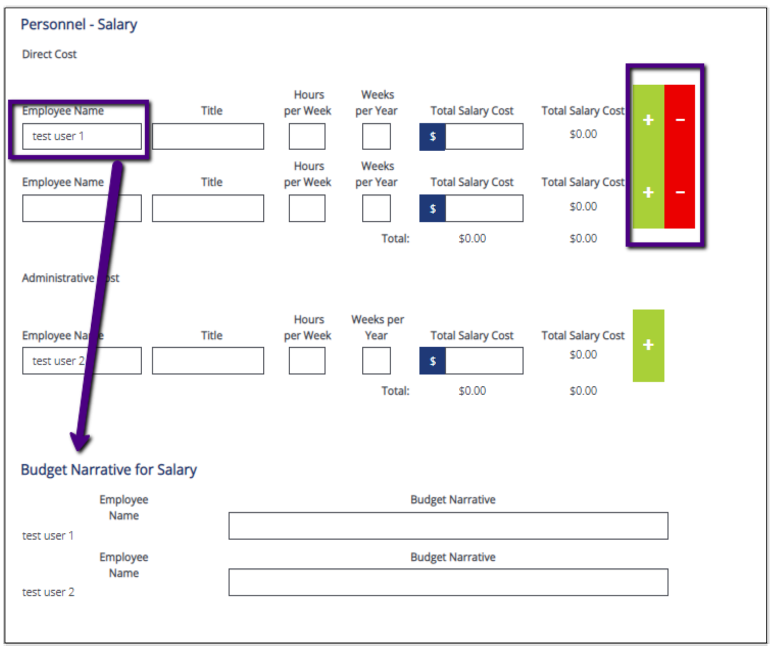


Types of Forms

There are several types of forms within the MOVA eGrants system. These forms can be found within the lefthand navigation pane of the Opportunity that the user is submitting for. More information about each specific process and its forms can be found in its respective training materials.

Budget Forms

Subrecipients will have the option to enter direct costs or administrative costs to their application. The subrecipient will be asked to enter information in relation to their request for funding. Each direct row and administrative row will have the ability to add more line items with the green + sign. Pressing the + sign will add a row to the section. Once a second row is added, a – sign will be become available for deleting unwanted rows. Clicking the – sign will erase a row from the screen. The first field (i.e. Employee Name, see screenshot below) will populate into the Budget Narrative section at the bottom of the page. The subrecipient will then be required to fill out the form with more specific information for each line item, as requested by MOVA.



Hyperlink Forms

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 hyperlink forms can be found on the Award Letter and Contracting page 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.

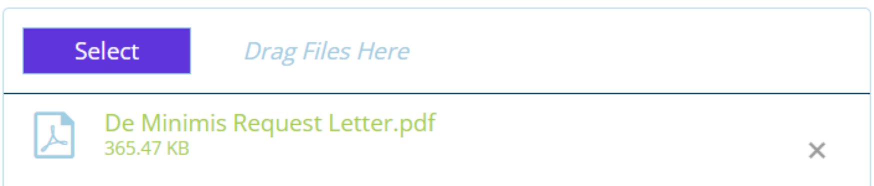
To upload a document using the Select button to browse, please follow these instructions:

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.

Expenditure Report Process

This process is initiated by an Agency Administrator, Authorized Representative, or Fiscal Contact. Log in as one of these roles and find an application that is in the Contract Executed status to initiate an Expenditure 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.
5) If you are finding your contract this way you have not yet been added to the document. Please see the add/edit portion of this manual to add yourself to this document or have your Agency Administrator or Authorized Official help you.

Forms for the Expenditure Report Process
Forms that need to be filled out: *Backup Worksheet*, *Expenditure Summary.* More information about the expenditure report process can be found in the respective training materials from MOVA.

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 Expenditure Report initiated after it and so on. When the next Expenditure Report is initiated, it will pull the data from the last Expenditure 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 Expenditure 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 expenditure reports submitted before FY23.

Finding & Completing Expenditure Forms
Once an Expenditure 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 Expenditure 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 Back-up 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 expenditure report data.

VSS Expenditure Summary with Match example

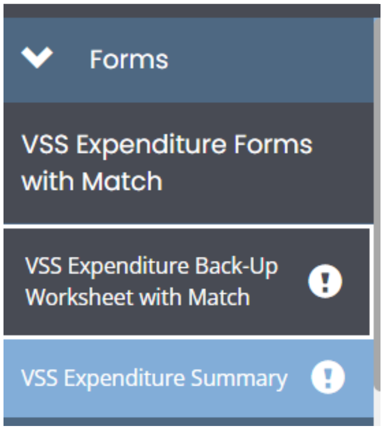
VSS Expenditures:	October
Agency:	
Program:	

		Year-To-Date Spending Approved			Year-To-Date Spending *Pending PC Approval*	
Budget Cost Category	VSS Approved Budget	$ Amount	% Amount	Current Period Request	$ Amount	% 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

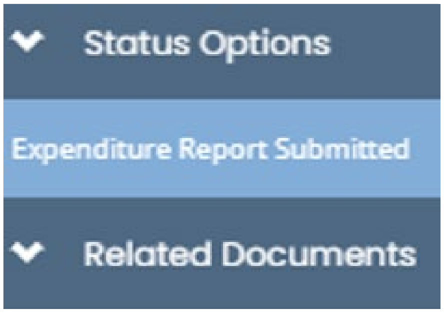
		Year-To-Date Match Amount Expended			Year-To-Date Match Expended *Pending GM Approval*	
Budget Cost Category	Approved Match	$ Amount	% Amount	Match Expended Current Period	$ Amount	% Amount
Personnel (Salary + Fringe + Consultants + Office & Admin)	**$0**	**$0**	%	**$0**	**$0**	%
Salary	$0	$0	%	$0	$0	%
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. Expenditure reports or any other forms cannot be submitted with errors.



Submitting Expenditures

After a user has initiated an expenditure 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 for their review and approval.

Expenditure Modifications

During MOVA's review, they may require more information from your agency on this expenditure 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 left-hand Navigation Panel.

Expenditure Notifications

Certain users will receive notification emails upon different status changes. The system notification email will be sent out once the expenditure reaches its trigger status. For example, when an expenditure is created it is considered "In Process." When the user has confirmed submission, the expenditure moves into the status Expenditure Report Submitted. A notification email will be sent once the user pushes to this status.

Expenditure Report in Process TO Expenditure Report Submitted

- *Sent To: Authorized Representative, Agency Administrator, Fiscal Contact*

Expenditure Report in GM Review TO Expenditure Report Modifications Required

- *Sent To: Authorized Representative, Agency Administrator, Fiscal Contact*

Expenditure Report Ready for Approval TO Expenditure Report Processed

- *Sent To: Authorized Representative, Agency Administrator, Fiscal Contact*

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, 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

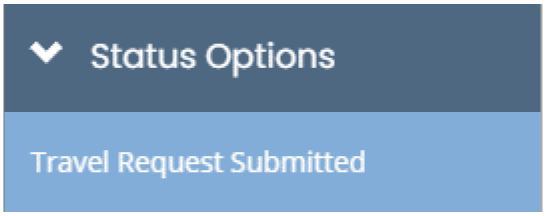
Once an application/award reaches the status of Contract Executed, the Agency Administrator, Authorized Representative, Programmatic Contact and Alternate Programmatic Contact roles will all have the ability to create a new Out of State Travel Request (OSTR). This process will occur the same way for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

1) Enter an application/award.

2) Scroll down on the left-hand side menu until you reach Related Documents.
3) Click on the Initiate Related Doc button.
4) In the 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, they may require more information from your agency on this the Out of State Travel Request. If that happens, MOVA will push the status of this report 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. The system notification email will be sent out once the Travel Request reaches its trigger status. For example, when a Travel Request is created, it is considered "In Process." When the user has confirmed submission, the report moves into the status "Travel Request Submitted." A notification email will be sent once the user pushes to this status.

Travel Request in Process TO Travel Request Submitted

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

Travel Request in Review TO Travel Request Modifications Required

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

Travel Request in Review TO Travel Request Denied

- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

Travel Request in Review TO Travel Request Approved

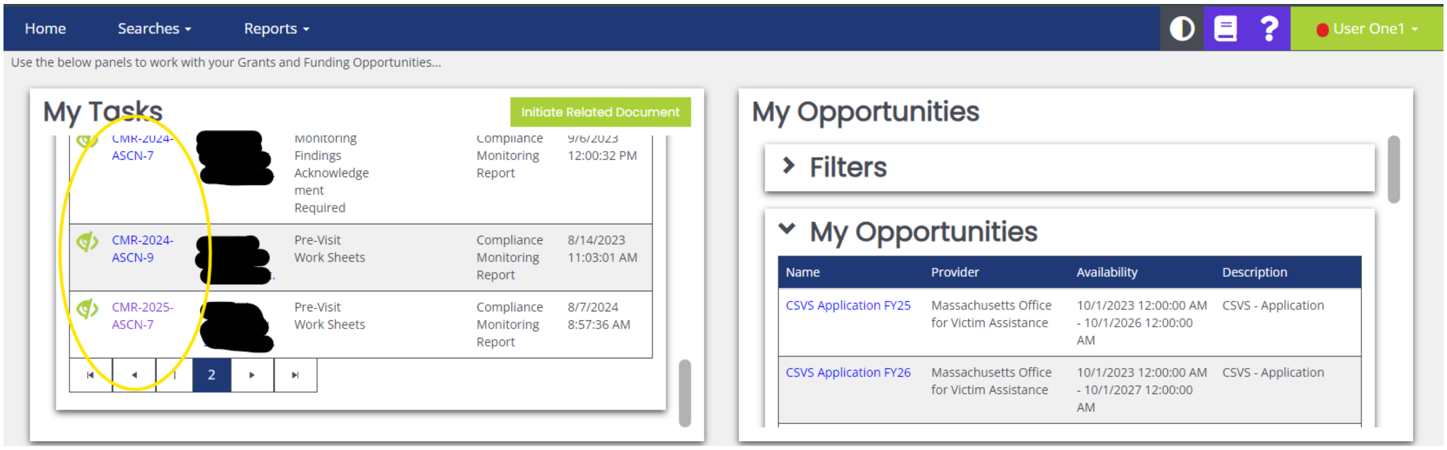
- *Sent To: Authorized Representative, Agency Administrator, Programmatic Contact, Alternate Programmatic Contact*

Compliance Monitoring

All subrecipients of MOVA-administered awards will undergo a formal compliance monitoring process with MOVA, also known as a site visit. The site visit meeting will be performed in person and the pre-visit and post-visit processes will be conducted via eGrants. When MOVA initiates a site visit process (or Compliance Monitoring Report) in eGrants, users will receive a notification email that a Compliance Monitoring Report (CMR) has been initiated, instructing the user to complete the pre-visit worksheets. MOVA may also initiate this process if a compliance issue has been identified outside of the site visit process. In such cases, pre-visit worksheets will not be utilized, and the process will begin in the status of Monitoring Finding Acknowledgement Required and an Acknowledgement Form will need to be completed by the user.

NOTE: If a user was part of the contract before the Compliance Monitoring Process started, they can find the Compliance Monitoring Report (CMR) in the "My Tasks" section of the Home screen. If not, the CMR can be accessed using the search function by following these steps:

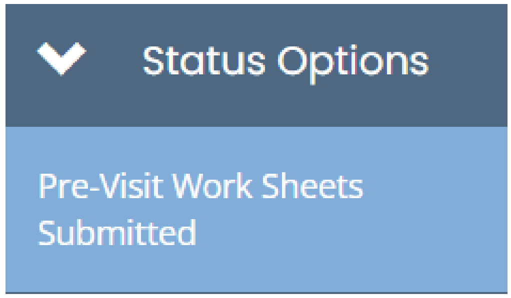
1) Under the MOVA eGrants logo in the top left corner, click on Searches
2) Select Compliance Monitoring
3) Click the green Search button. This should populate any Compliance Monitoring Reports your role has access to. See the example below:



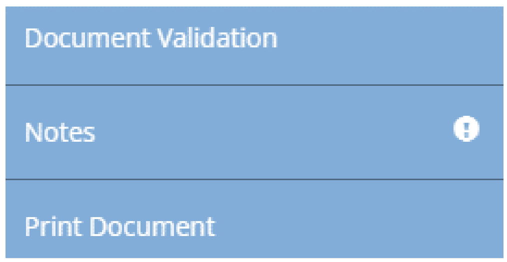
Pre-Visit Worksheets

When a Compliance Monitoring Report is initiated, the first step is to fill out the pre-visit worksheets and submit them to MOVA before the assigned deadline. Within these forms you will select which types of MOVA-administered awards your agency receives, and those selections will populate questions to be completed specific to the award type. (Forms: Fiscal Monitoring Worksheet, Award Administration Monitoring Worksheet, and Programmatic Monitoring Worksheet)

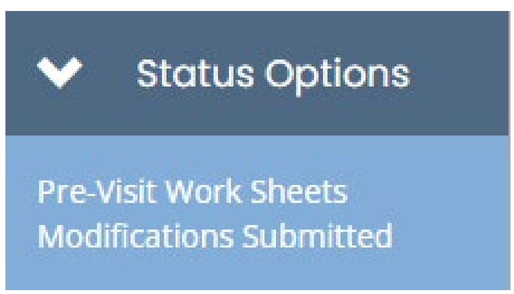
Once the worksheets have been filled out completely and saved successfully, they should be submitted to MOVA. In order to submit these forms, from the left-hand navigation panel under the heading Status Options, select the Pre-Visit Worksheets Submitted option and choose OK to submit. The status will then change to Pre-Visit Worksheets in Review.



MOVA will review the submitted worksheets and may require more information from your agency. If that happens, MOVA will push the status of the report to Pre-Visit Worksheets Modifications Required. This will send a notification email to users. If modifications to the worksheets are required, users will need to update sections of the forms which they previously filled out. The notes section will indicate where edits or updates are needed within the worksheets. Select the Notes selection from the left-hand navigation panel under the heading Tools.



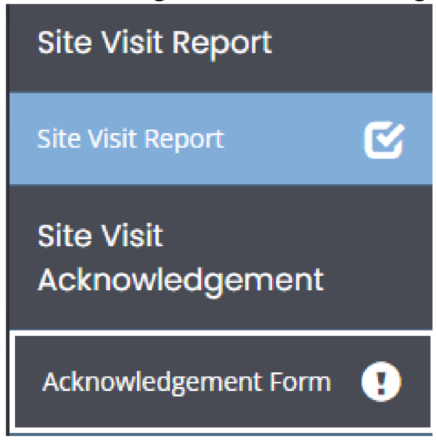
Once the requested modifications have been made, select the Pre-Visit Worksheets Modifications Submitted selection from the left-hand navigation panel under the heading Status Options and choose OK to submit. The status will again change to Pre-Visit Worksheets in Review. This process can occur as many times as MOVA requires until the Pre-Visit Worksheets are completed successfully.



Site Visit Report and Monitoring Findings Acknowledgement

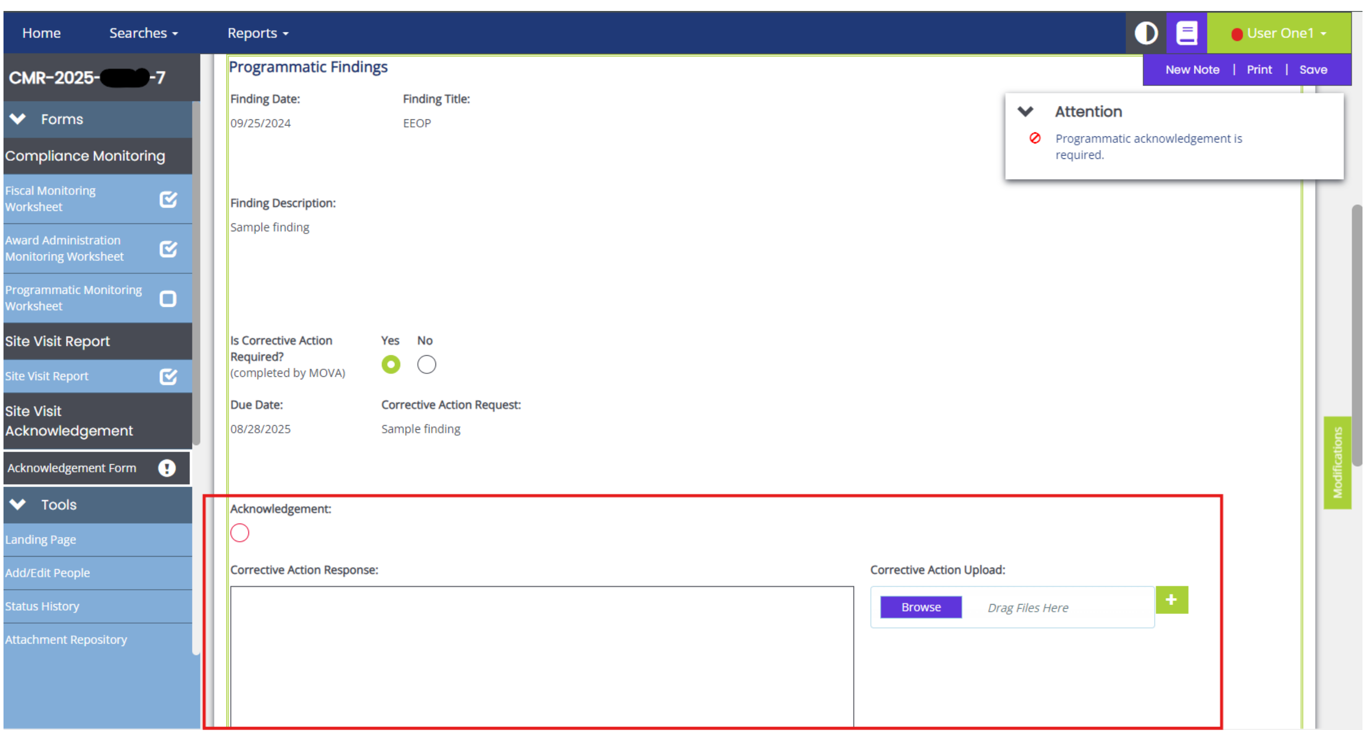
Following the site visit, subrecipients will receive an email indicating if any follow-up items from the site visit need further attention. If follow-up is required, MOVA will provide detailed instructions on what actions the subrecipient must take in that email. After MOVA completes the site visit report, users will receive a notification email that the status has been changed to Monitoring Finding Acknowledgement Required. The next steps in the Compliance Monitoring process will take place within eGrants.

If the status is Monitoring Finding Acknowledgement Required, users will need to review the completed Site Visit Report and fill out the Acknowledgement Form. The Acknowledgment Form is based on the Site Visit Report form. Both will be available for the users to view under the Forms heading in the left-hand navigation panel. I9

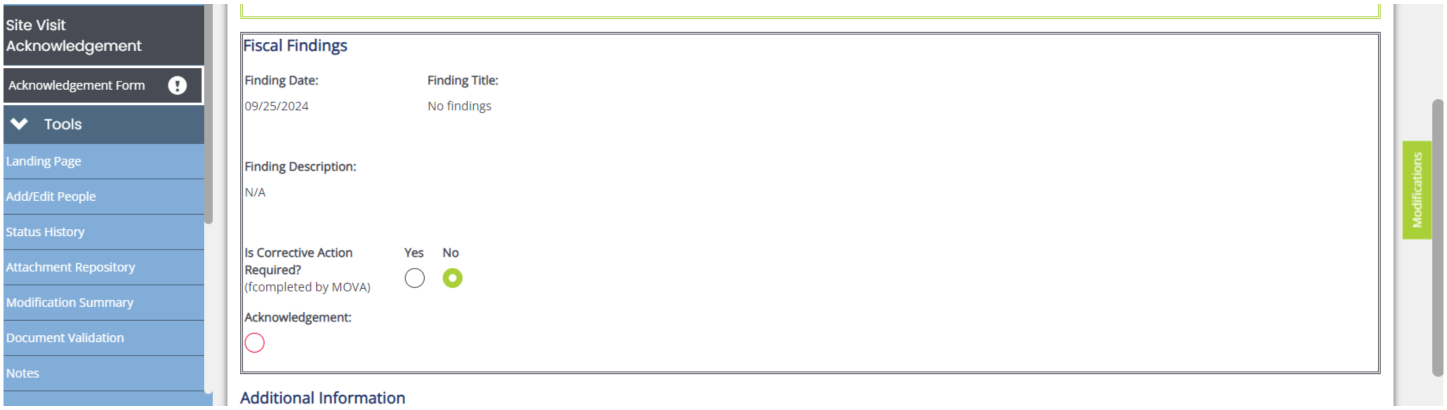


The Acknowledgement Form will outline any findings and/or additional information identified within the compliance monitoring process and whether there are any Corrective Actions required in order to resolve identified findings. The user should complete all fields within the Acknowledgement Form that require acknowledgement and response. In the upper right-hand corner of the form an Attention box will provide indication of what is required on the form.

In the example below, there was a programmatic finding identified that has an associated corrective action. The finding must be acknowledged via the 'acknowledgment' radio button, the corrective action response field must be completed with a written response, and any necessary documents related to the corrective action must be uploaded into the 'Corrective Action Upload' field.



If there were no findings identified, the Acknowledgement Form still must be completed to acknowledge that there were no findings by selecting the 'acknowledgement' radio button. If there were no findings, that information will be conveyed in the Acknowledgement Form. See example below.



Once the Acknowledgement Form is filled out and saved successfully without error, it can be submitted to MOVA before the assigned deadline. To submit the Acknowledgement Form, select the Monitoring Finding Acknowledgement Submitted selection from the left-hand navigation panel under the heading Status Options and choose OK to submit.

If further information is required by MOVA after the Acknowledgement Form has been submitted, users will get a notification email and the Compliance Monitoring process will return to the status Monitoring Finding Acknowledgement Required. This process can occur as many times as MOVA requires in order to resolve any findings. Once all findings have been acknowledged and resolved successfully, the status will change to Monitoring Complete.

The Outcomes Measurement Tool (OMT)

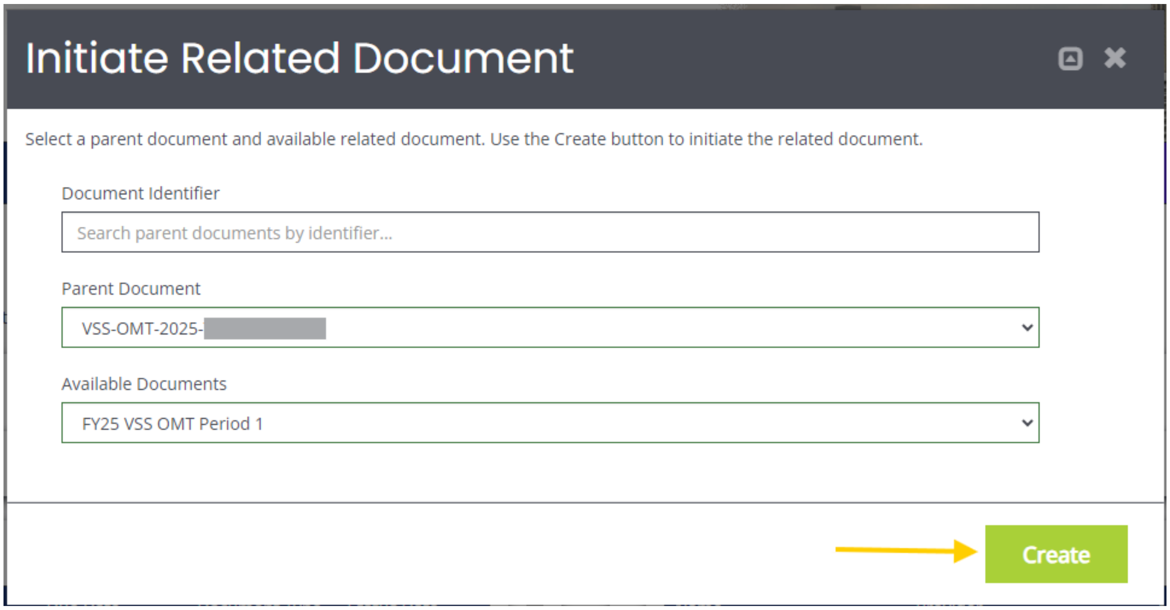
The Outcomes Measurement Tool submission can be initiated as described below. More detailed information about this process is available on MOVA's website. The instructions below will apply to Victim & Survivor Services (VSS) awards, SAFEPLAN awards and Culturally Specific Victim Service (CSVS) awards. Places where the process differs between the types of awards will be specified. If your agency receives a VSS award and a SAFEPLAN award, you will need to complete this process for each award.

OMT Initiation

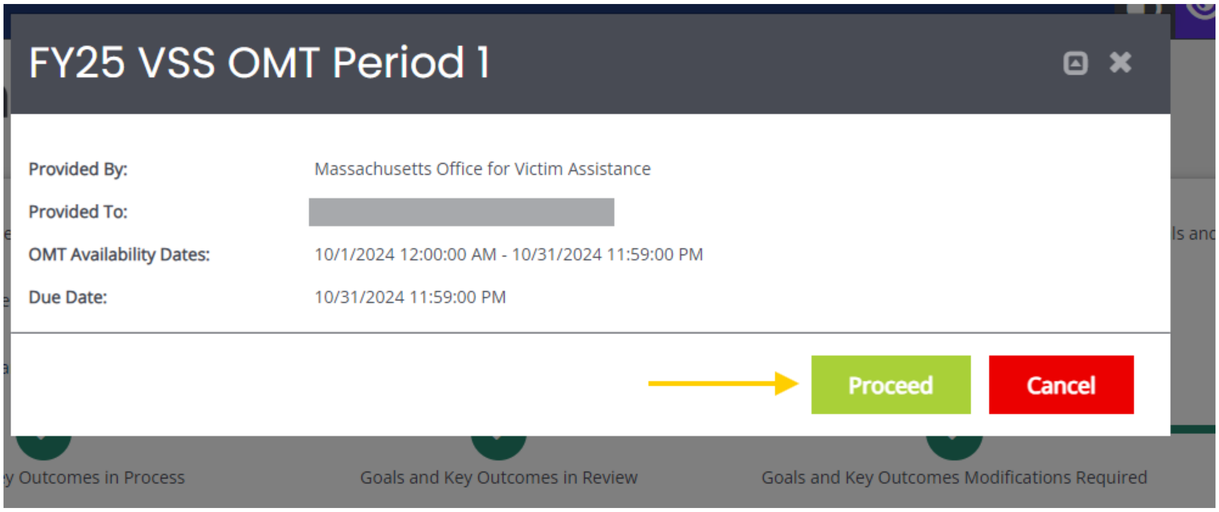
The FY25 OMT can be initiated 2 ways. Instructions for both methods are as followed:

1. Option 1: 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 FY25 Goals and Key Outcomes). Next, under the "Available Documents" drop-down, you will select the correct reporting period. Once you have selected the correct information, press the green "Create" button. A pop-up window will appear with information regarding

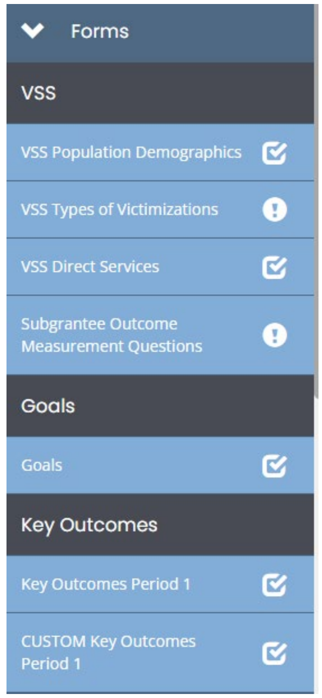
the availability dates and the due date of the OMT. Press the green "Proceed" button. You will now be taken to your OMT file that is ready for data entry.



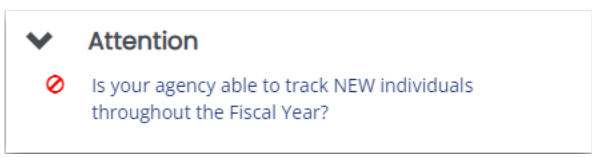
2. Option 2: Using the “Searches” function, select “OMT Goals and Key Outcomes.” Open your FY25 Goals and Key Outcomes file. Scroll down on the left-hand side of the file to and click the “Initiate Related Documents” button. A pop-up window will appear with information regarding the availability dates 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.



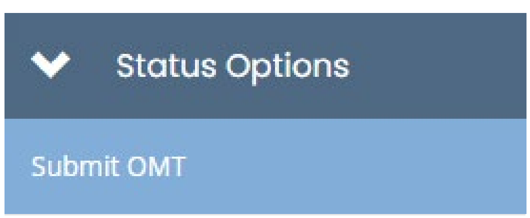
From the landing page, click Population Demographics to begin data entry. Fill in all required fields with your agency’s data for the quarter. When viewing a quarterly OMT within the eGrants system, you can click through the different sections of the OMT form using the navigation panel on the left side of the eGrants window. Any sections with a checkmark indicate that they are complete. Any sections 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.



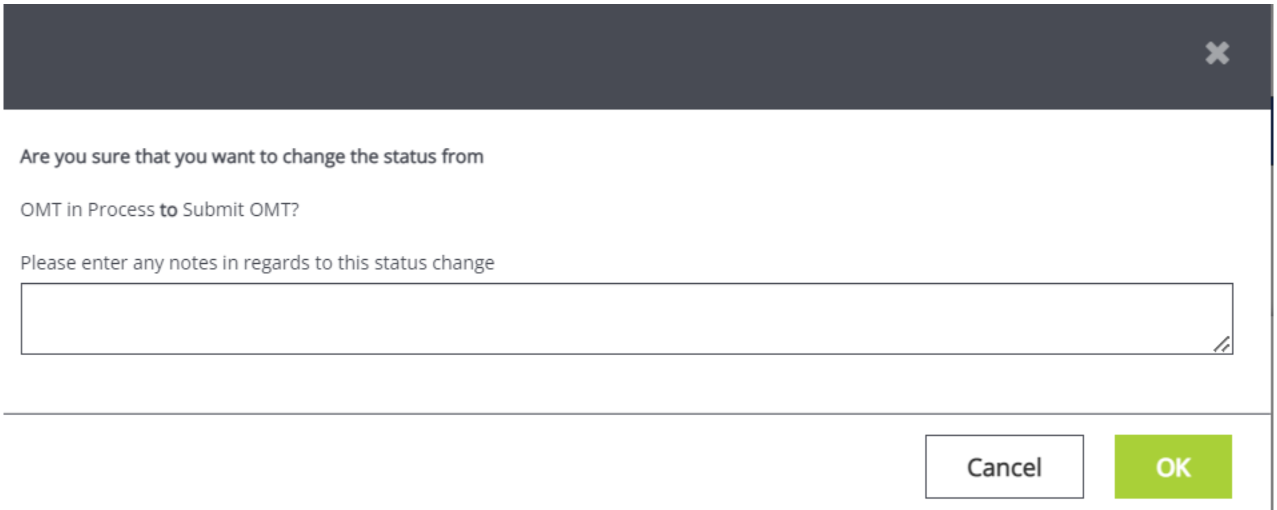
Once a form with an exclamation point is selected from the navigation panel on the left-hand side of the eGrants window, you will be taken to that form. Any error messages will appear in box on the upper right-hand corner of your screen. These errors should be corrected prior to saving the OMT form within 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, you want to submit and allowing you to write any notes to MOVA. Press “Ok” and your OMT will be submitted to MOVA for review.


Are you sure that you want to change the status from
OMT in Process to Submit OMT?
Please enter any notes in regards to this status change
Cancel
OK