# MOVA eGrants

# SUBRECIPIENT MANUAL

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# 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 3<sup>rd</sup> 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  $\rightarrow$  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 <u>www.adobe.com</u>.

# System Login Page

#### URL

To access the MOVA eGrants portal, type the following into the address bar of the web browser and press *Enter*. <u>https://MOVA.intelligrants.com/</u>

NOTE: The MOVA eGrants portal does <u>not</u> save the username and password. This option <u>may</u> be available for some browsers.

# **MOVA eGrants Portal Home Login Page Sections**

<ul> <li>Welcome to MOVA eGrants, the electronic system for managing grants administered by MOVA.</li> <li>New System Users</li> <li>All new users must register with the system to get login Credentials. You will be notified when your registration is approved.</li> <li>Click New User? Register Here! link at the bottom of the login box to start your MOVA eGrants registration process.</li> <li>Click here for the MOVA eGrants registration tutorial.</li> <li>Need Assistance?</li> <li>For technical questions on site navigation, contact Agate Software HelpDesk at 1-800-820-1890 or helpdesk@agatesoftware.com.</li> <li>For general questions about MOVA grants or grant program requirements, contact MOVA at 617-586-1340 or mova@mass.gov.</li> <li>For specific questions about your currently-funded grant, contact your MOVA grant manager.</li> <li>Users are MOVA approved within a 24 hour period.</li> </ul>	Login Username LSewell321 Password
	Log In Login Assistance New User? Click Here

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.

Login		
Username		
Username		
Please enter your us	sername	
Password		
Password		۲
	Log In	
	Login Assistance	
Ne	w User? Click Here	

#### **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.

Forgot Password	
Email	
Username	
Forgot Username	Clear

#### "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. 10/22/24 Copyright © Agate Software, Inc. Page 7 of 43

#### 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.

Forgot Password	
Email	
Username	
Forgot Username	Clear Email

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.

Password	Confirm Password

#### 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.

Login	
Username	
Username	
Please enter your username	
Password	
Password	۲
Log In	
Login Assistance New User? Click Here	

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.

ge instructions for the registration modal		Middle Name		
inst name				
Last Name		Prefix	Suffix	
			~	~
SAM		FEIN		
	Search			
Organization		Title		
Address		Address 2		
State		County		
Massachusetts	~			~
City		Zip Code		
Email		Phone		
Phone 2		Fax		
Cell Phone		Website		
Username				

#### 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

Profile	
Basic Information	
First Name	Middle Name
Subgrantee Recipient	
Last Name	Prefix Suffix
Testing	· · · · · · · · · · · · · · · · · · ·
Title	
Testing	]
Primary Phone	Secondary Phone
555555555	
Email	
ajurgensen@agatesoftware.com	
2014 University	State
City Okemos	State Kentucky
ZIP 48866	County
48800	Adair County 🔻
Additional Information	
Job Certification	
Select	
<u> </u>	
Security Image	
No Image Selected	Update Security Image
Username	
TestingRecipientAdmin	Edit Username
Password	Edit Password

#### **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

<u>Agency Administrator</u> – 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

<u>Programmatic Contact</u> – 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).

<u>Alternate Programmatic Contact</u> – 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)

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

• Access to forms: ALL forms

<u>View Only</u> – 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.

0 🗄 ?	SubrecipientLAS Authorized Official2 🗸
	Profile
	Messages
	Edit Dashboard
	Initiate Related Doc Logout

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.

Organi	zation Information
🗸 Ago	ate Software
Organizat	ion Information
Organizat	ion Members
Organizat	ion Categories

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

					SubRecipient AO
Organization Me	mbers				
Instructions: Use the available search criteria to filter the members To add a new member, click the Add New button and f You can limit system access by setting the Active/Inact	ollow the instructions.				
Members Search					
Name		Role		Active	
			~	Both	~
					Clear Search
✓ Members					
Person Name	Role Name	Active Date	Inactive Date		

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.

	dd Person		0:
	adreison		
	utims .		
	Enter new Person information and taxe. New Person will be added to consultation surrority being vessed.		
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Lab. law   Lab. law   Law   Law   Law   Law   Inno   Law			¥
Larkizer     Larkizer       Larkizer     Larkizer       Title     Image: Construction of the stand	Minife Maren		
rel   rel   rel   rel   rel   later n   later n <td></td> <td></td> <td></td>			
rel   rel   rel   rel   rel   later n   later n <td></td> <td></td> <td></td>			
Bit   Distant	Lati Kene	LA:	
presc     presc     Maren 2     Maren 2 <td></td> <td></td> <td>~</td>			~
Nation Nation   1 Andronologo, Nation Nation   Dig Nation   Internation Nation   20 Dil Univ	rti		
Nation Nation   1 Andronologo, Nation Nation   Dig Nation   Internation Nation   20 Dil Univ			
I ABDADDO ABDA DADI TIDIO     Exp   Baser   Base	ontact Information		
Dy Inter   Bare Strandnamm,   20 failt Strandnamm,   21 failt Strandnamm,   22 failt Strandnamm,   23 failt Strandnamm,   24 failt Strandnamm,   25 failt Strandnamm,   26 failt Strandnamm,   26 failt Strandnamm,   27 failt Strandnamm,   28 failt Strandnamm,   29 failt Strandnamm,   20 failt Strandnamm,   20 failt Strandnamm,   2	Address .	Julii ren 2	
Istem     Istem     Interface     Interface <td>1 All Outpon Place, such 1181</td> <td></td> <td></td>	1 All Outpon Place, such 1181		
e p tabi g ta	Dig	lauter	
Index care     Index care     V	linius	Maxaduarite.	¥
Index care     Index care     V	29.044	Davity	
			×
	handy have		
Internation	Tax	Veda	_
Internation			
NIX     NIX     NIX     NIX     NIX       Image: total bade Sources of Original Sources of	Del		
NIX     NIX     NIX     NIX     NIX       Image: total bade Sources of Original Sources of			
	asign Roles		
ingen to Entring Dawnwerd @	R/A A210 200		
	V 0 17/16.013	C MARCOWWY	
Internation Intern	insign to Datating Documental 🚯		
UNITYANS  Carlin Passard  Carlin Passard			$\sim$
UNITYANS  Carlin Passard  Carlin Passard			
Penanol (antive Penanol	curity Information		
	DRAWNING CONTRACTOR OF		
	Patanami	Carrieres Panasarel	

- 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	
<ul> <li>Massachusetts Office for Victim Assistance</li> </ul>	
Organization Information	
Organization Members	
Organization Categories	
Person Categories	
Contact Information	

#### **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.

e Searches <del>-</del>								0	? Subreci	pient Authorized
Ishboar	d									
elow panels to work with yo	ur Grants and Funding Opportu	inities								
My Opportur	nities			Му	/ Tasks				Initiate	Related Documer
Name	Provider	Availability	Short Description		Filter					
DDTF Application	Massachusetts Office for Victim Assistance	10/1/2019 12:00:00 AM - 10/1/2022 12:00:00 AM	Drunk Driving Trust Fund - Application		FIILEI					
DDTF Letter of Intent	Massachusetts Office for Victim Assistance	9/30/2019 12:00:00 AM - 10/1/2021 12:00:00 AM	Drunk Driving Trust Fund - Letter of Intent	×	My Ta	sks				
SAFEPLAN Application	Massachusetts Office for Victim Assistance	10/1/2019 12:00:00 AM - 10/1/2022 12:00:00 AM	SAFEPLAN - Application		ame AFE-BC-2021-	Organization Test Organization	Status Bidders'	Due Date	Document Type	Status Date
SAFEPLAN Bidders'	Massachusetts Office for Victim Assistance	2/3/2020 12:00:00 AM - 2/8/2021 12:00:00 AM	SAFEPLAN - Bidders' Conference		est Org M-1	- MOVA	Conference in Process		Conference	PM
SAFEPLAN Letter of Intent	Massachusetts Office for Victim Assistance	9/29/2019 12:00:00 AM - 10/1/2021 12:00:00 AM	SAFEPLAN - Letter of Intent		DTF-2020-Test rg M-14	Test Organization - MOVA	Application in Process		Application	2/11/2020 1:28:34 PM
	Vicum Assistance	10/1/2021 12:00:00 AW		DI	DTF-2020-Test	Test Organization	Application in		Application	2/18/2020

# 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.

#### lcons

0	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 <b>Profile</b> , <b>Messages</b> , <b>Edit Dashboard</b> , and <b>Log Out</b> 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.

Home Administration -	Searches - Reports -			D	Authorized OfficialARI
Messaging	Instructions				
Inbox	Click the envelope icon to expand each message.				
Sent	Inbox Search				
	From		Subject		
	Associated Document		Archived Messages		
					Clear Search
	✓ Inbox				
	Mark As Read V Apply				
	From	Subject	Sent	Associated Document	
	Grant System	Your MOVA Travel Request, OSTR-	8/30/2023 3:25:05 PM	OSTR-2024-MARV-2	

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.

# Dashboard

Use the below panels to work with your Grants and Funding Opportunities...



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.

My Tasks	Initiate Related Document
> Filter	
> MyTasks	2

#### 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.

My Tas	ks			Initiate Related Documen
➤ Filte	r			
Name			Organization	
Туре			Status	
Include	d Documents	~		~
	ssigned Documents	v		

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).

> Filter			
<ul> <li>My Opport</li> </ul>	unities		
Name	Provider	Availability	Description
	Massachusetts Office for	10/1/2020 12:00:00 AM -	SAFEPLAN - Application
SAFEPLAN Application FY23	Victim Assistance	10/1/2023 12:00:00 AM	

# 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.

Sample Proc	ram Application	© ×
Provided By:	Base Provider Organization Agate Software	
Application Availability Dates:	5/4/2019 10:00:00 AM - 5/25/2022 9:30:00 AM	
Sample Funding Program for the Agreement Language:	IGX System	
By selecting the Agree button bel Applicant to make all representat	ow, I attest that I am a duly authorized representative of the Applicant, and have been authoriz ions, attestations and certifications contained in this RFP and all Addenda, if any issued, and to half of Applicant. I also attest that the Applicant is eligible to apply for this RFP.	2
	Agree De	cline

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

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# 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.

Massachusetts Office For Victim Assistance National Assistance Provide	eGrants			
Home Searches <del>-</del>			Subrecipient Authoriz	
DDTF-2020-Test Org M-14	Document Landin	a Page		New Note
✓ Forms	View document details.	gruge		
DDTF Application Forms	DDTF Application	DDTF Application	Application	
Section I 🕑	Organization	Your Role		
Section II 🛛 🕑	Test Organization - MOVA	Subrecipient Authorized Official		
Section III 🕑		Application Not Application Recommended Contract in Fiscal Review	Subrecipient Signatures Contract Pending Executive Contract Execute	d
Organizational Questionnaire 🕑	Recor	mmended for Funding for Funding	Required Director Signature	

#### 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.

DDTF-2020-Test Org M-14		
> Forms		
> Tools		
Status Options		
Related Documents		

#### 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.

VSS-2025-MAR	V-53	Last Saved 9/24/2024 10:45 AM New Note   Prin
✓ Forms		Ésta de la companya d
ielp	C	Help for VSS Applications
/ICTIMS OF CRIME /	ACT	Complete the application process by following the steps below:
(VOCA) GRANT APPLICATION FORMS		The only roles who can initiate, work on, and submit the application are: Agency Administrator, Authorized Representative, and Application Submitter     Click into each of the following sections, follow the instructions on each respective page, answer the required and applicable questions, and frequently save by clicking "Save" in the upper righthand corrections of the following sections of the following sections and frequently save by clicking "Save" in the upper righthand corrections of the following sections of the following sections of the following sections of the following sections of the instructions on each respective page, answer the required and applicable questions, and frequently save by clicking "Save" in the upper righthand corrections of the following sections of the following sections of the following sections of the instructions of the page.
pplication Questions	C	The required documents for this application are:
	1.000	Application Questions
rganizational Juestionnaire	C	<ul> <li>eGrants Tip:</li> <li>Ensure that you answer the first question in Application Questions (acceptance of match waiver) and click save so that applicable budget forms open up in the lefthand panel</li> </ul>
Y25 VSS Budget Fe	orms	Organizational Questionnaire
vithout Match		Budget Request Forms
(25 - Salary	e	Cost Categories     e Grants Tips;
	C	If unable to see the green + or red - options for adding and deleting rows, make sure to scroll all the way to the right of your screen. If zoomed in too much, these buttons will not be visible on screen
	<b>1</b>	The funding request section (the line items) of each budget page must be filled out and saved before the budget narrative section can be filled out. If line items are not reflected in the bottom

#### 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.

✓ Tools
Landing Page
Add/Edit People
Attachment Repository
Modification Summary
Status History
Notes
Print Document

#### 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	1
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	1
« 1 »					

#### 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.

ocument Person		6 ×
Person		
Type or click here		-
Role		
		×
Active Date	Inactive Date	
		Save

#### 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.

Dc	Document Person		
	Person SewellS1, Test		
	Role		
	Subrecipient Staff	]	
	Subrecipient Authorized Official		
	Subrecipient Program Administrator	Save	
	Subrecipient Staff		

#### 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.

			(	ß	×
					_
Add a new message					
	<b>£</b>	Ø	<b>"</b>	1	

#### 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

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

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Ø	Attachment(s)	This tool allows the user to add attachments to the note.
<b>A</b>	Editor	This tool allows the user to edit a note.
1	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.

Notes Q	
Instructions go here	
	٩
Add a new message	
Testing Admin - 10/22/2019 1:24:40 PM TEST	■ Delete ····· ■ External
Reply	
Testing Admin - 10/22/2019 1:24:02 PM TEST	✓ Edit     Delete     Internal
Reply	•

#### 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.

string Admin - 10/22/2019 12:840 PM									
$\phi_1$ $\rho_2$ Formats • $\mathbf{B}$ $\mathbf{U}$ $\mathbf{I}$ $\boldsymbol{\phi}$									
TEST									
Select	1								
4									
Reply									

- 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.

Testing Admin - 10/22/2019 1:2:4:40 PM ▲ TEST	
Testing Admin - 10/22/2019 1:42:33 PM TEST 2.0	
Reply	•

#### 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.

Version				~
	Include	Include with Attachments	Exclude	Include Blank Copy
Select All	$\bigcirc$		0	$\bigcirc$
Section I	$\bigcirc$	$\bigcirc$	0	$\bigcirc$
Section II	$\bigcirc$	$\bigcirc$	0	$\bigcirc$
Organizational Questionnaire	$\bigcirc$	$\bigcirc$	0	$\bigcirc$

#### **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.

Document Search					
Name			Organization		
Туре			Status		
		*			Ŧ
Sub Code					
					Clear Search
✓ Documents					2
Name	Organization	Туре		Status	Sub Code
Application-Agate Software-1	Agate	Sample Program Application		Application in Phase 1 Review	2018

# 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**  $\rightarrow$  [Specific Report Group (Optional)] or [Specific Report].
- 2) Enter in search criteria (optional) and click the *Search* button.

KY Report Sample										
Search Criteria	l							Search		
Export to Excel										
Drag a column header and drop it he	ere to group by that	column								
Organization	T	Doc_Number	T	Status	т	Туре	T			
Agate				Default		Organization Details				
Base Applicant Organization				Default		Organization Details				
Org 123				Default		Organization Details				
Grant System				Default		Organization Details				
Org Test Manager				Default		Organization Details				
Test Org BG				Default		Organization Details				
Jons Org				Default		Organization Details				
Test Org 11-04-2019				Default		Organization Details				
Another Org				Default		Organization Details				
								NaN - NaN of 1330 iter		

# **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).

Subrecipient Civil Rights Training Requirement	
This MOVA form should be reviewed and signed by both the programmatic and acceptable. Signatures indicate that the form has been read, understood and th rights laws and requirements numbered in those documents, which apply to all	at the agency will remain in compliance with all applicable federal civil
Select Drag Files Here	

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.

Select	Drag Files Here	
De Mini 365.47 KB	mis Request Letter.pdf	×

# **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 Sp	ending Approved		Year-To-Da *Pending P
Budget Cost Category	VSS Approved Budget	\$ Amount	% Amount	Current Period Request	\$ Amount
ersonnel dary + Fringe)	\$104.00	\$0.00	0.00%	\$0.00	\$0.00
alary	\$100.00	\$0.00	0.00%	\$0.00	\$0.00
ringe	\$4.00	\$0.00	0.00%	\$0.00	\$0.00
onsultants	\$10,000.00	\$0.00	0.00%	\$0.00	\$0.00
ffice & Admin	\$0.00	\$0.00	%	\$0.00	\$0.00
<b>ther</b> pulpment+Travel + Contracts + Other + Indirect)	\$0.00	\$0.00	%	\$0.00	\$0.00
quipment	\$0.00	\$0.00	%	\$0.00	\$0.00
ravel	\$0.00	\$0.00	%	\$0.00	\$0.00
ontracts	\$0.00	\$0.00	%	\$0.00	\$0.00
Other	\$0.00	\$0.00	%	\$0.00	\$0.00
direct	\$0.00	\$0.00	%	\$0.00	\$0.00
Totals:	\$10,104.00	\$0.00	0.00%	\$0.00	\$0.00

			Match Expe
			Match Amount ended
Budget Cost Category	Approved Match	\$ Amount	% Amount
Personnel Salary + Fringe + Consultants + Office & Admin)	\$0	\$0	%
alary	\$0	\$0	%
iringe	\$0	\$0	%
onsultants	\$0	\$0	%
Office & Admin	\$0	\$0	%
<b>Ither</b> quipment+ Travel + Contracts + Other + Indirect	\$0	\$0	%
juipment	\$0	\$0	%
avel	\$0	\$0	%
ontracts	\$0	\$0	%
ther	\$0	\$0	%
direct	\$0	\$0	%
Totals:	\$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:

j	Searches <del>-</del>	Reports •						D	8?
elow p	anels to work with yo	our Grants and Funding Opportunities							
у Т	asks		Initiate	Related Docur	ment	My Opportur	nities		
9	CMR-2024- ASCN-7	Monitoring Findings Acknowledge ment Required	Compliance Monitoring Report	9/6/2023 12:00:32 PM		> Filters			
(ه)	CMR-2024- ASCN-9	Pre-Visit Work Sheets	Compliance Monitoring Report	8/14/2023 11:03:01 AM		✓ My Oppo Name	Provider	Availability	Description
٩	CMR-2025- ASCN-7	Pre-Visit Work Sheets	Compliance Monitoring Report	8/7/2024 8:57:36 AM		CSVS Application FY25	Massachusetts Office for Victim Assistance	10/1/2023 12:00:00 AM - 10/1/2026 12:00:00 AM	CSVS - Application
H	• 1 2					CSVS Application FY26	Massachusetts Office for Victim Assistance	10/1/2023 12:00:00 AM - 10/1/2027 12:00:00 AM	CSVS - Application

#### **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.

Document Validation	
Notes	•
Print Document	

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. 19

Site Visit Report	
Site Visit Report	C
Site Visit Acknowledgement	
Acknowledgement Form	•

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.

Home Searches <del>-</del>	Reports <del>-</del>			0 \Xi	🕒 User One1 👻
CMR-2025	Programmatic Findir	gs		New M	Note   Print   Save
✔ Forms	Finding Date: 09/25/2024	Finding Title: EEOP		Attention     Programmatic acknowledg	ement is
Compliance Monitoring				required.	
Fiscal Monitoring Worksheet	Finding Description:				
Award Administration Monitoring Worksheet	Sample finding				
Programmatic Monitoring D					
Site Visit Report	ls Corrective Action Required?	Yes No			
Site Visit Report 🛛 🗹	(completed by MOVA)	$\circ$ $\circ$			
Site Visit Acknowledgement	Due Date: 08/28/2025	Corrective Action Request: Sample finding			Sec.
Acknowledgement Form 🔹 🚺					dificat
✓ Tools	Acknowledgement:				
Landing Page	0				
Add/Edit People	Corrective Action Respons	e:	Corrective Action Upload	d:	
Status History			Browse	rag Files Here	
Attachment Repository					

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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.

ite Visit Acknowledgement	Fiscal Findings
Acknowledgement Form	Finding Date: Finding Title:
✓ Tools	09/25/2024 No findings
anding Page	Finding Description:
	N/A
	Is Corrective Action Yes No Required?
	(fcompleted by MOVA)
	Additional Information

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.

✓ Status Opti	ions
Monitoring Finding Acknowledgment Su	bmitted

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

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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.

Initiate Related Document	۵	×
Select a parent document and available related document. Use the Create button to initiate the related document.		
Document Identifier		
Search parent documents by identifier		
Parent Document	_	
VSS-OMT-2025-		
Available Documents	_	
FY25 VSS OMT Period 1		
	reate	

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.

FY25 VSS O	MT Period 1	⊆ ≯	•
Provided By: Provided To: OMT Availability Dates: Due Date:	Massachusetts Office for Victim Assistance 10/1/2024 12:00:00 AM - 10/31/2024 11:59:00 PM 10/31/2024 11:59:00 PM		ls an
y Outcomes in Process	Goals and Key Outcomes in Review	Proceed Cancel Goals and Key Outcomes Modifications Require	red

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.

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✓ Forms	
VSS	
VSS Population Demographics	¢
VSS Types of Victimizations	•
VSS Direct Services	¢
Subgrantee Outcome Measurement Questions	•
Goals	
Goals	¢
Key Outcomes	
Key Outcomes Period 1	¢
CUSTOM Key Outcomes Period 1	¢

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.

~	Attention
0	Is your agency able to track NEW individuals throughout the Fiscal Year?

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 <b>to</b> Submit OMT?	
Please enter any notes in regards to this status change	
	li li
	Cancel OK