DHSES E-Grants Help Guide

Table of Contents

Introduction

DHSES E-Grants system was developed for the NYS Division of Homeland Security and Emergency Services (DHSES) by Network Systems Integration, Inc.

DHSES E-Grants is a web-based system for DHSES staff to interact with applicants and subrecipients. A key feature is the ability of the system to implement a role-based security system that will control access rights throughout the DHSES E-Grants system.

This document is to be used as a reference guide to enable DHSES E-Grants users to enter, view, retrieve and query grant data from the electronic database. The following general statements are pertinent:

- All data used in the examples and screens throughout this guide are not actual grant data. This has been done to comply with the confidentiality assigned to all the information contained in grant documents.

- The user's guide has been written assuming that a user has 'Grantee' rights in accessing the DHSES E-Grants.

- It is assumed that all DHSES E-Grants users will access the program through the latest versions of Chrome, Firefox or Internet Explorer.

- Prospective applicants, awardees and subrecipients can log in to submit grant information for processing by DHSES. Applicants, awardees and subrecipients only have access to **<u>their</u>** information and only records that match the rights of the user will be displayed.

- DHSES staff has access to projects and the appropriate modules with regard to their job responsibilities.

- Buttons, lists, check boxes, and other dialog box elements are displayed in *italics*.

Getting Started with DHSES E-Grants

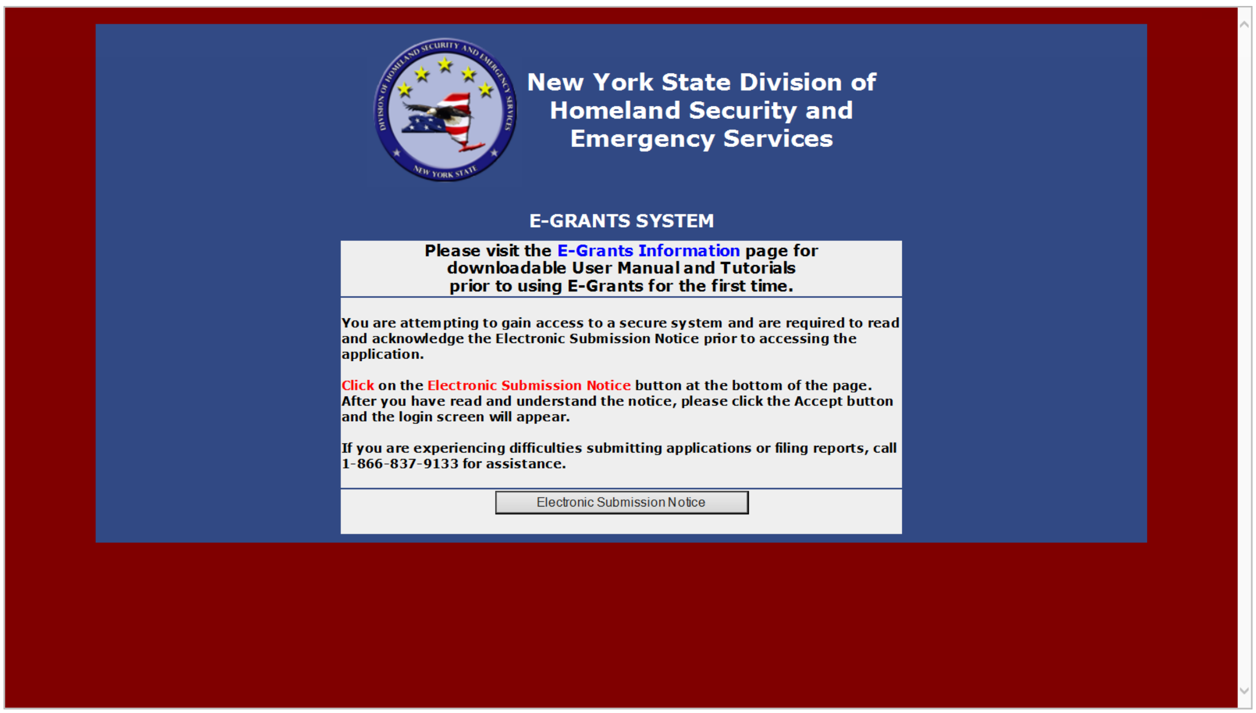
DHSES E-Grants is designed as a web page and requires a browser to access the program. The latest versions of Internet Explorer, Chrome or Firefox are recommended. To check your browser version:

- Open your browser.
- Click on *Help.*
- Click the *About* option. The version number will be found there.

To access DHSES E-Grants, you must have a username and Password. Please contact DHSES at grant.info@dhses.ny.gov if you need to request a username and password.

When you first access DHSES E-Grants, the Acceptance page will be displayed. This screen prompts the user to acknowledge that a secured system is being accessed.

✓ Click on the *Electronic Submission Notice* button to view the document.
✓ Click *Accept* to access the DHSES E-Grants login page.



Access Notice screen of DHSES E-Grants

Electronic Submission Notice

The New York State Division of Homeland Security and Emergency Services (DHSES) encourages the electronic submission of applications for grant funding as this method expedites the process, reduces the amount of paper materials involved in the grant award process, and minimizes the possibility of clerical errors.

By submitting an application electronically through E-Grants, it is unnecessary to forward any materials to DHSES. However, by submitting electronically, the applicant agrees that

1. The application is made with the full knowledge and consent of the official authorized to enter into contracts on behalf of the municipality or agency and agrees to comply with the requirements set forth in 'New York State Division of Homeland Security and Emergency Services Certified Assurances for Federally-supported Projects: Certifications Regarding Lobbying; Debarment, Suspension and Other Responsibility Matters; and Drug-Free Workplace Requirements'

2. Upon receiving an award, the applicant shall comply with all applicable federal, state, and local statutes, rules and regulations and

3. Once the applicant receives an award, a contract will be developed based upon the information contained within the application, but the fully executed contract is the only document binding on the parties.

Before any application is submitted by a municipality or agency, the authorized signing official should read and agree to abide by provisions of the following documents which become a part of resulting contracts:

1. 'Appendix A: Standard Clauses for all New York State Contracts' and

2. 'Appendix A1: Agency-specific Clauses' (for DHSES).

3. 'Appendix C: Payment and Reporting Schedule'

It is important to note that DHSES may suspend funding, in whole or in part, terminate funding for, or impose another sanction on a grantee if it appears that the electronic submission of an application did not comply with the above requirements.

DHSES strongly recommends that the applicant:

1. Print the pertinent documents listed above - accessible at http://www.dhses.ny.gov/grants/

2. Ensure review of the documents and signed approval by the authorized signing official.

3. Retain the documents for future reference. Do not send them to DHSES.

If an award is made and a contract is subsequently developed from the application, the contract package that is sent to the official for signature will contain the required documents.

Accept

Electronic Submission Notice

Logging-In

To Log-in:

- ✓ Enter your Login Name.
- ✓ Enter your password.
- ✓ Click on the *Submit* button to gain access to DHSES E-Grants.

Login screen

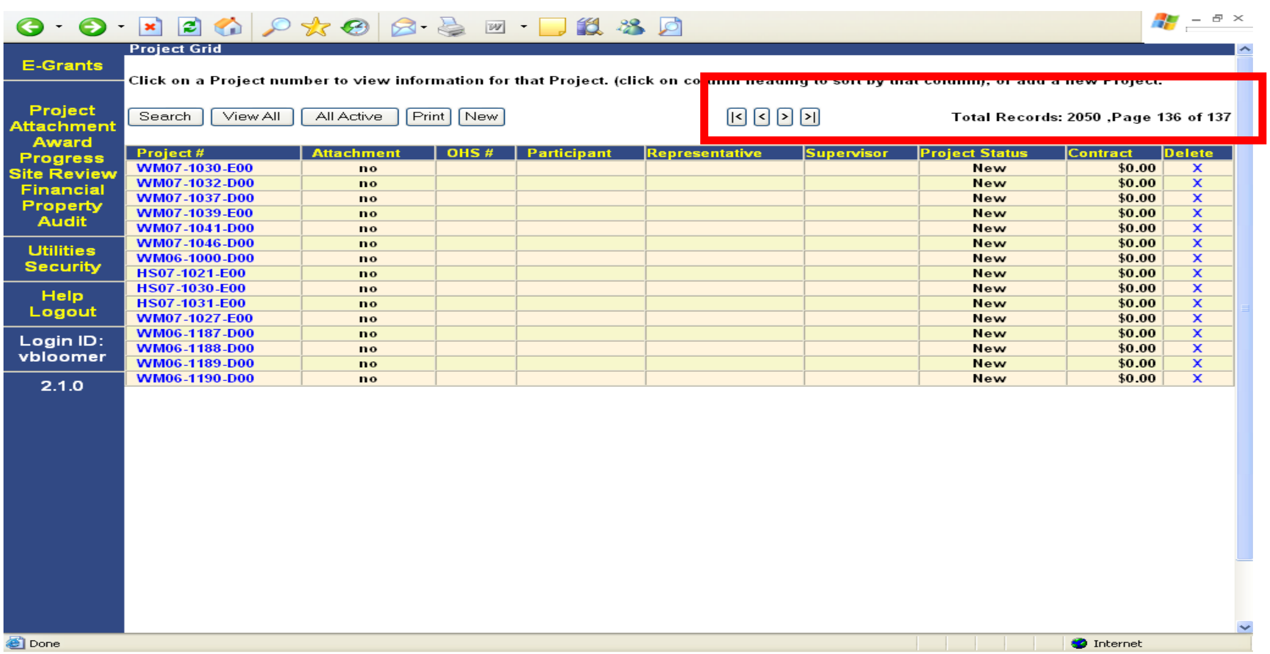
Once you have logged in, the Welcome to DHSES E-Grants Page will be displayed.

- ✓ Click on the word *Project* in the upper left corner to open the list of projects that match the access rights of the user or to create a new Project.

Welcome screen

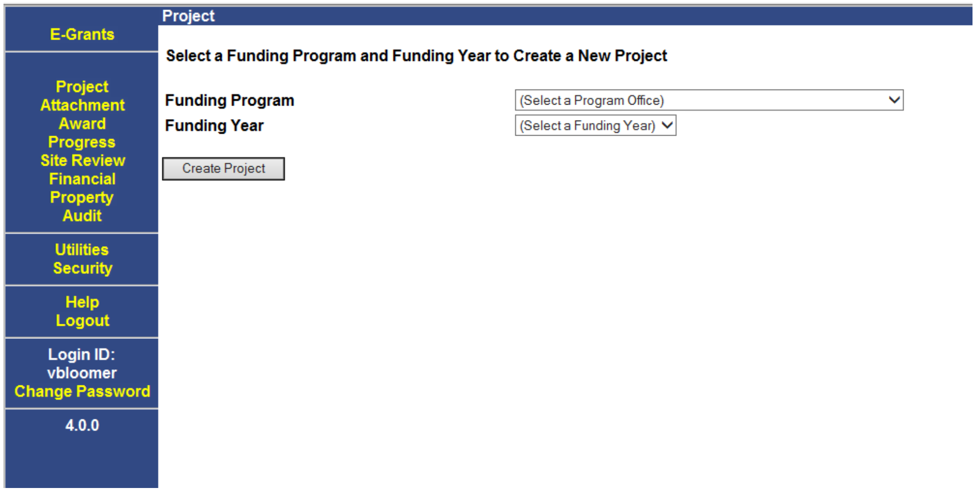
✓ To access an existing project, click on the Project # you want to access. Only the projects the user has access to will be visible on this screen.

Only 15 projects are shown on a page. Above the list of projects are navigation buttons to access the different pages. In addition, the page number currently displayed is shown as well as the total number of pages available.



Select a Project screen

✓ To create a new project click on the *New* button. A drop down box will display to select the appropriate Funding Program and Funding Year.



Create New Project screen

Changing Passwords

The login page also allows authorized users to change their password:

- ✓ Enter your Login Name.
- ✓ Enter your Password.
- ✓ Click on the *Change Password* button.
- ✓ On the next screen enter your Login Name and Password.
- ✓ Enter your new password, in the *New Password* box (Passwords must be at least 8 characters long, with a combination of at least three of the following: lower case letters, upper case letters, numbers, keyboard symbols (! @ # $ % & *).
- ✓ Re-enter the new password, in the *Confirm New Password* box.
- ✓ Click *Save Change.*

The next time you log-in you must use the new password.

Logging-Out

- ✓ Within any of the E-Grants pages, click the *Logout* button located towards the bottom of the left frame. <u>Exiting by clicking on the *X* button on the top right corner may introduce undesired behavior</u>.

DHSES E-Grants Page Navigation

To provide consistency, all the pages throughout DHSES E-Grants consist of a left frame, header and content area.

Navigation through the pages is possible by clicking on the various types of “links” that have been created on each screen or page. These links can be tabs, hyperlinks, buttons, or drop down boxes and when you click on them the system takes you to another page within DHSES E-Grants.

DHSES E-Grants Frames

DHSES E-Grants pages were designed with two frames or parts. These frames are always displayed below the browser toolbar. Based on user rights, some of the choices will not be seen or will be “grayed” out and not accessible to the user.

Left Frame

Words in yellow are links to other screens, words in white are headings. Below is a brief description of the left frame choices:

Left Frame Choices	
Choice	**Function**
DHSES E-Grants	Takes the user to the DHSES E-Grants Welcome screen.
Project	Takes the user to list of projects they have access to or to create a new project.
Attachment	Subrecipients can attach documentation with application submission.
Progress	Create, read or update progress reports submitted by the subrecipient.
Site Review	Subrecipient can read documentation of official site visits.
Financial	Under Construction
Property	Able to enter an equipment inventory
Help Logout	Takes the user to Help screen or Logout, respectively
Login ID	Indicates the sign in ID of the current user.
Change Password	Allows the user to change their password
Version	Lists the current version of DHSES E-Grants

After selecting a project the left frame has the following choices:

Left Frame Choices	
Choice	**Function**
Home	Takes the user to the DHSES E-Grants Welcome screen
Open	Takes the user back to the grid, showing all of the projects.
Save	Saves any changes which the user may have made.
Locked	Notifies the user that E-Grants is locked for changes
Submit	(Seen only by a subrecipient, when the project status is New and at least one participant is entered.) Clicking this button changes the status of the grant to Application Received.
Attachment Progress Site Review Financial Property	Lists the other modules for the selected project. Clicking on one of these choices takes the user to the actual attachments, progress, site review, etc. of the selected project.
Application	A printable summary of the application.
Deficiency	A report of the areas where DHSES has determined that the application information submitted is not yet adequate to generate a contract.
Draft Contract	A printable draft contract.
Final Contract	Creates a printable version of the executed contract

Header

When a project is selected this area displays the following information: Project #, Funding Source, Participant and Project Status.

Content Area and Tabs

After opening a specific project, a series of tabs can be seen below the header. The data in the content area corresponds to the tab currently selected. DHSES E-Grants divides the modules into tabs to help organize the information. To access a particular tab, simply click on that tab. **Remember to save before moving onto another tab or your information will be lost.**

Drop Down Boxes

Several fields in the system require the user to place a value in the field by selecting it from a predefined list of choices. Click on the arrow to the right side of the box to scroll through your choices and then select the name by clicking on it. If the list of values is long, hit a letter or number to quickly skip through the records.

Going Back to a Previous Page

It is not recommended to use the browser *Back* button to go to previous pages of the DHSES E-Grants web application. Doing so may cause undesired behavior. Instead, use the navigation buttons provided within DHSES E-Grants.

Time-out

There is a time-out feature that will log a user out if no activity is detected. To prevent being logged-out, we recommend that you log out if you are going to leave your desk or are not planning to use DHSES E-Grants for more than thirty minutes.

Applicants can work on a project at leisure. DHSES E-Grants will save the data and allow the applicant to return to the application to continue working.

Project Module

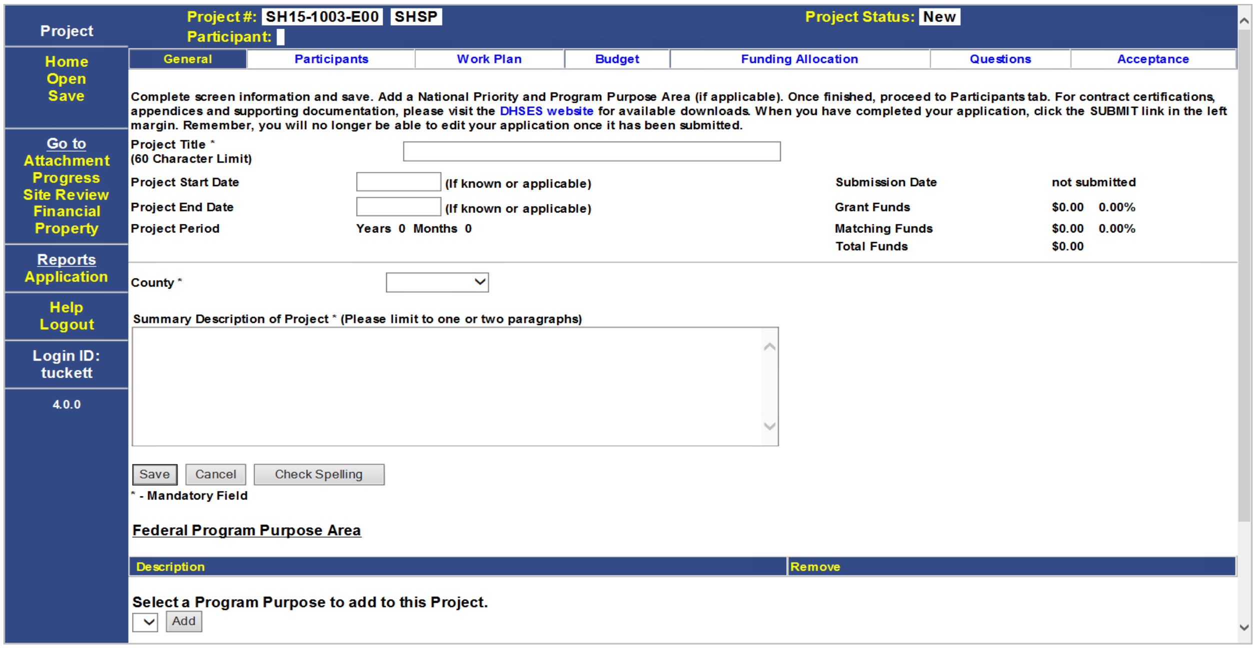
This is where the prospective subrecipient will enter and submit information for their grant application or current subrecipients can view, enter or print project information.

Project Module Tabs	
Tab	**Information**
General	Has the title, dates of the project, county and description of the project.
Participant	Lists the organizations that will be taking part on the project. Contact information for individuals within the organization are located under this tab.
Work Plan	Contains the goals, objectives, Investment Justifications, Target Capabilities, Tasks and Performance Measures to complete the project.
Budget	Has the financial information for this project.
Funding Allocation	G&T Workplan, National Priority, State Strategy Goal, Spending Subcategories and Disciplines for each budgeted item.
Questions (if applicable)	Contains questions generated when certain funding sources have been selected.
Acceptance	For certifying the Certified Assurances.

General Tab

Notice that the Project Header shows that the Project Status for this project as being New.

- ✓ Enter the Project data into the various data fields on the *General* tab.
  - Mandatory fields are: Project Title, County and Summary of Description of Project. These fields must be entered for the application to be submitted.
- ✓ When done, click on the *Save* button at the bottom of the page or the *Save* option on the left frame.



General Tab for the Project Module

Participants Tab

✓ Enter the participant information by clicking the *Participants* tab.

Selecting Participants

✓ Click the *Add Participant* button to search for an existing participant.
  - ✓ Enter the name you wish to search for; click *OK* and a list of matching names will appear, if any. Click on the name of the participant you wish to add, select the type (Grantee, Implementing Agency or Other) and it will be added to the project.

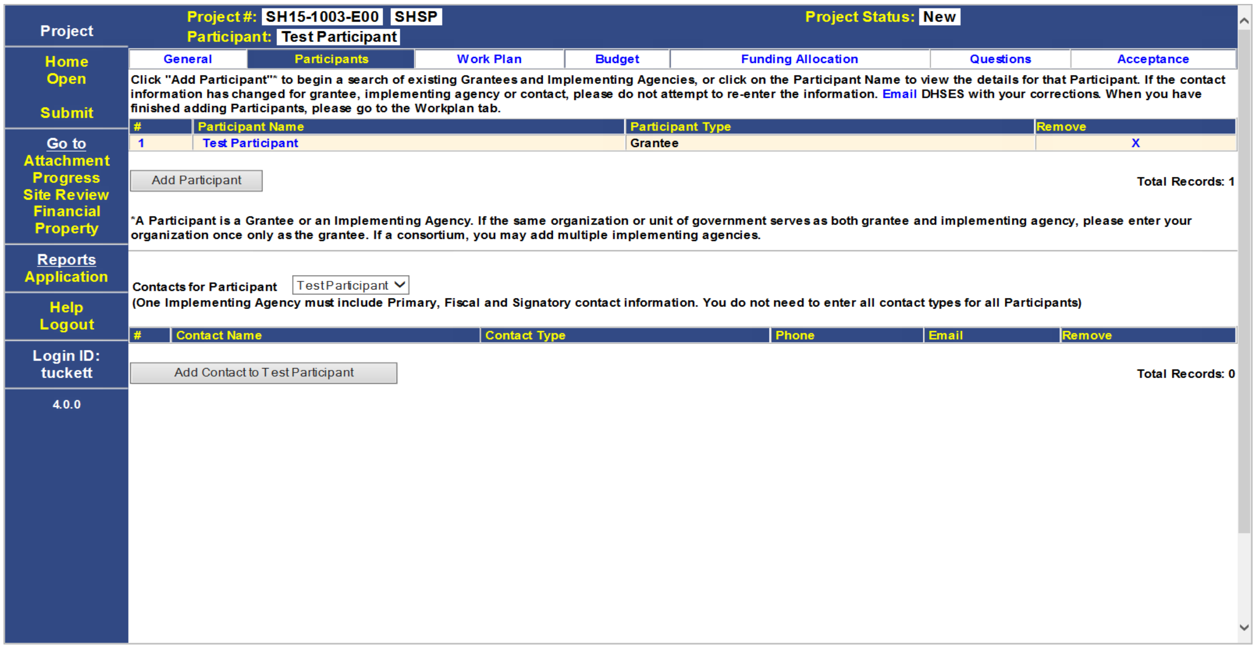
✓ However, if the participant is not in the data base you may add them by clicking on the *New* button.
  - ✓ Required fields are: Participant Name, Address, City, State and Zip, County and EIN #. Mandatory data must be entered before the record can be saved.

Selecting Contacts

✓ If more than one participant has been selected, use the drop-down box under "Contacts for Participants" to select the correct participant, then click *Add Contact* button.
  - ✓ Enter the name you wish to search for; click *OK* and a list of matching names will appear, if any. Click on the name of the contact you wish to add, select the type (Primary, Fiscal, Signatory, Agency Head, Secondary or Alternate) and it will be added to the project.

✓ If the contact is not in the data base you may add them by clicking on the *New Contact* button.
  - ✓ Required fields are: First Name, Last Name, Address, City, State and Zip, Email and Phone. Mandatory data must be entered before the record can be saved.
  - ✓ A minimum of one Primary, Fiscal and Signatory contact is needed for the Project.

Note: To add a Contact as a Signatory they must be a registered user of DHSES E-Grants with signatory rights.

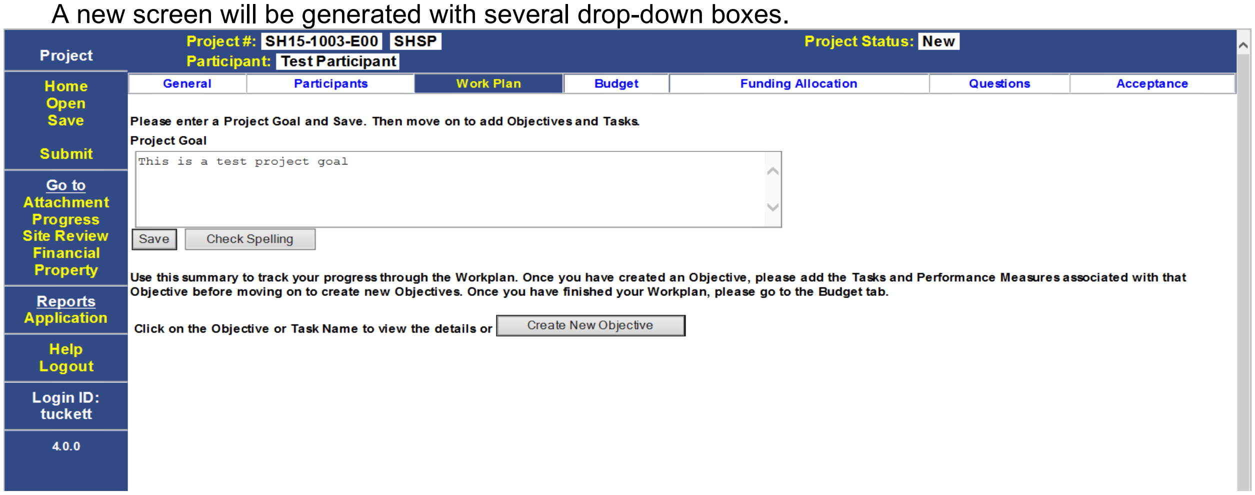


Participant Tab for the Project Module

Work Plan Tab

- ✓ Click on the *Work Plan* tab.
- ✓ Enter the Project Goal in the appropriate box.
- ✓ When done, click on *Save*.
- ✓ To add an objective, click on the *Create New Objective* button. You may have numerous objectives within the project.

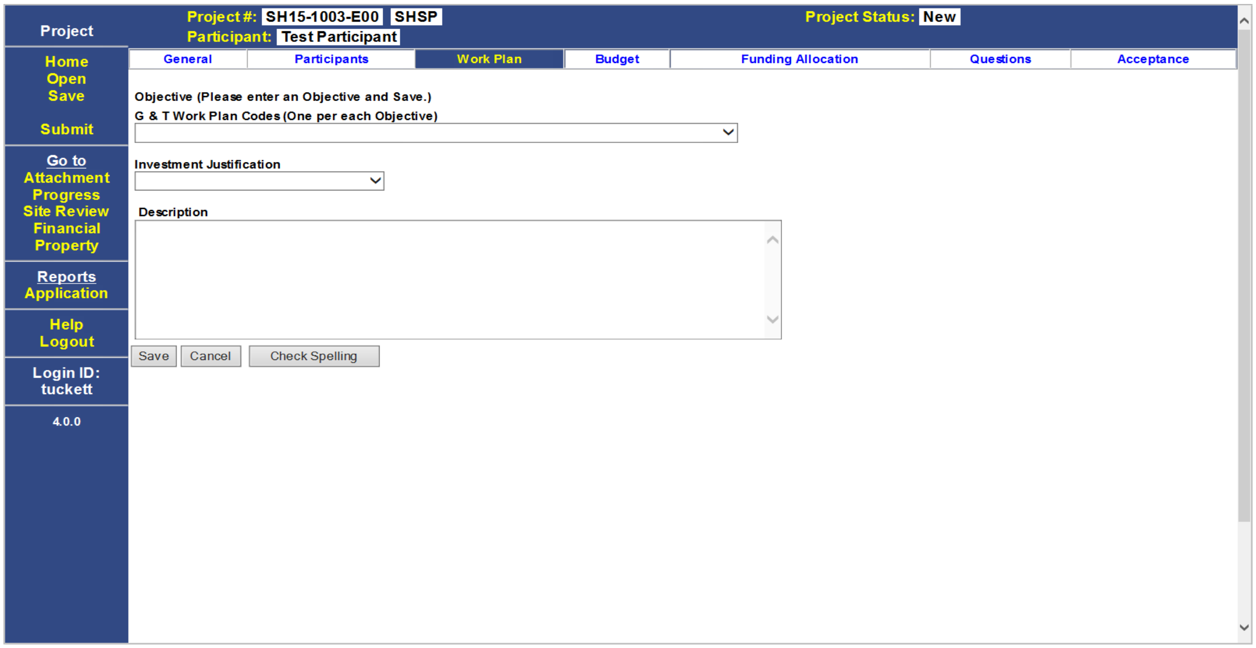
A new screen will be generated with several drop-down boxes.



Work Plan Tab (Project Goal)

Depending on the Funding Program you selected when you started your application, there may be additional selections to choose on the Work Plan Tab (see Page 13).

- ✓ Click on *G&T Work Plan Codes* drop-down box and select the Work Plan Code for your first objective.
- ✓ Click on *Investment Justification* drop-down box and select the Investment Justification that corresponds with the G&T Work Plan Code and Objective.
- ✓ Enter a description of the Objective
- ✓ Click on *Save* when completed.



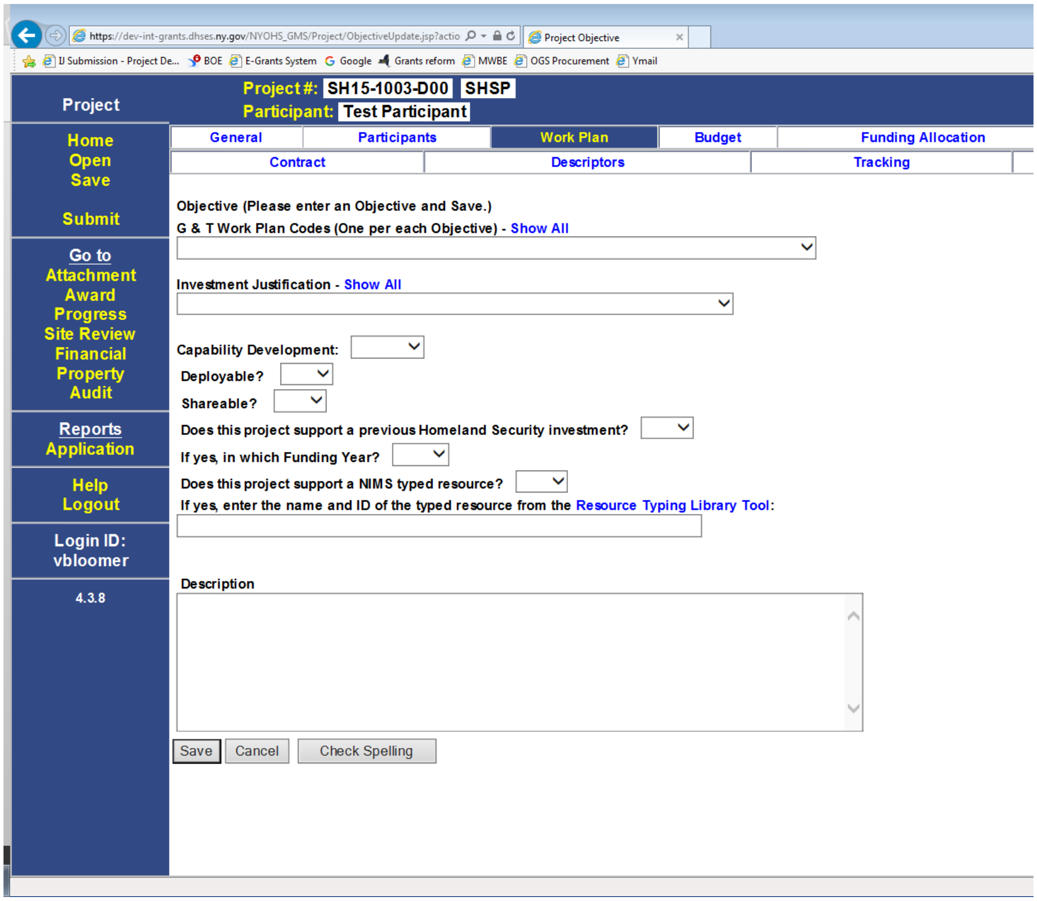
Work Plan Tab (G&T Code/IJ)

- ✓ Click on *Add Primary Target Capability drop-down box* and select the Primary Target Capability for this Objective. You also may select up to four Secondary Target Capabilities.

Work Plan Tab (Target Capabilities)

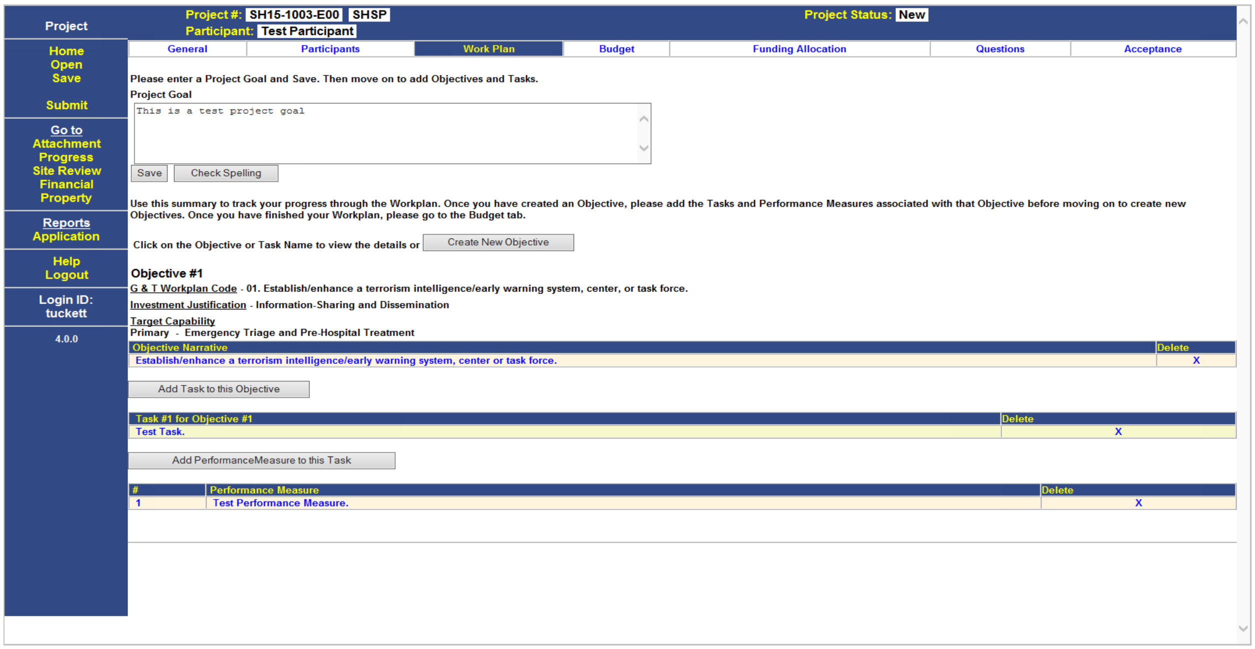
Go to Page 14 for further instructions.

Work Plan with additional selections



- ✓ Click on *G&T Work Plan Codes* drop-down box and select the Work Plan Code for your first objective.
- ✓ Click on *Investment Justification* drop-down box and select the Investment Justification that corresponds with the G&T Work Plan Code and Objective.
- ✓ Select Build or Sustain for Capability Development.
  (1) Build Capabilities - building refers to activities that start a new capability or increase a capability;
  (2) Sustain Capabilities - sustaining refers to activities that maintain a capability at its current level. When assessing the project type, if your project is both sustaining and building capabilities, please select the project type that best represents the majority of your project.
- ✓ Select yes or no for Deployable
  - ✓ A deployable asset as any capability that is physically mobile and can be used anywhere in the United States. Examples would include response teams (e.g. HazMat, Tactical or CERT), mobile radios, CBRE detection equipment, sheltering supplies, etc.
- ✓ Select yes or no for Shareable
  - ✓ A shareable asset as any non-deployable capability that can be utilized to augment and sustain reinforced response at the regional, state or national level. Examples would include a fusion center, emergency operations center, etc.
- ✓ Select appropriate response - Is this project is supported by a previous Homeland Security investment?
- ✓ If yes to previous question, please select the funding year this project supports.
- ✓ Is this project supported by a NIMS Typed Resource? (link to NIMS Typing Library Tool provided)
- ✓ Enter name and ID of typed resource if applicable.
- ✓ Enter a description of the Objective
- ✓ Click on *Save* when completed.

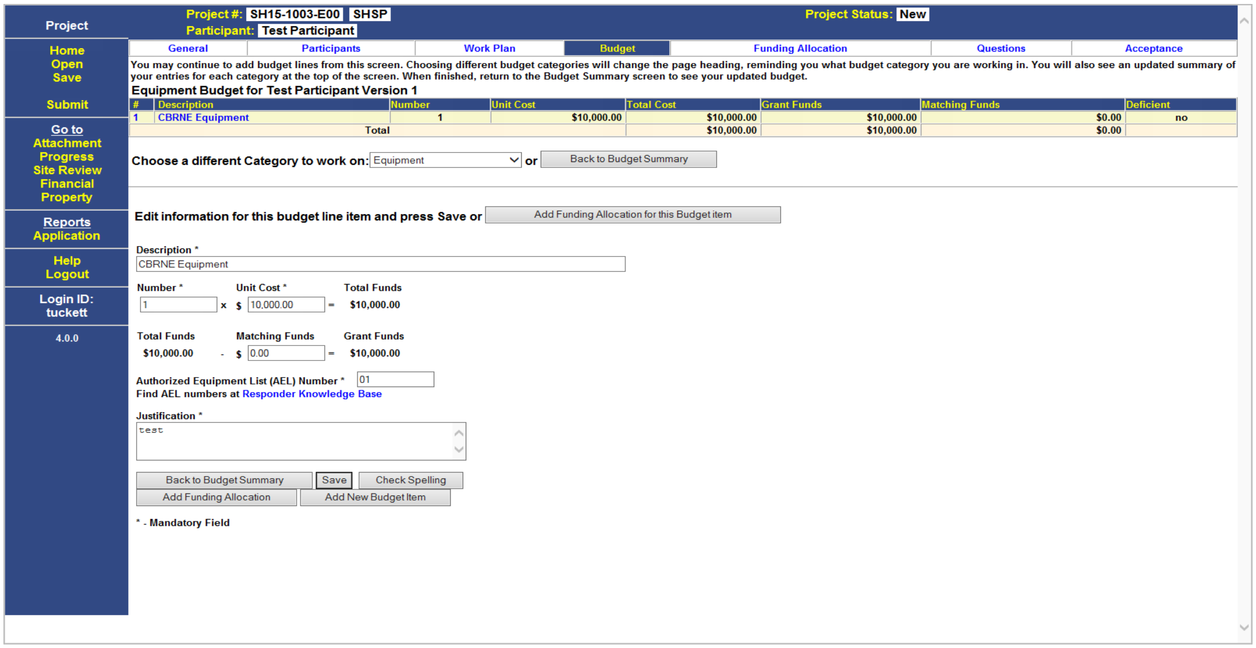
- ✓ Click on *Add Task to this Objective.*
- ✓ Describe the task in the first text box and hit *Save*.
- ✓ Click on *Add Performance Measure to this Task*
- ✓ Describe the Performance Measure and hit *Save.*
- ✓ Each objective **<u>must have</u>** a G&T Work Plan, Investment Justification, Target Capability, Task and Performance Measure.
- ✓ You may have several objectives and each objective may have several tasks and/or performance measures.



Completed Work Plan Tab

<u>Budget Tab</u>

- ✓ Click on the *Budget* tab, to enter budget information. **You must have at least one participant and a completed work plan before you can enter budget data.** You may add separate budgets for each participant.
    - ✓ The first time you enter a budget it will automatically be assigned the number "1."
- ✓ Click on the *Create new Budget Version for participant's name* to add the budget data for that participant.
    - o The next screen will display the fields for the budget information.
- ✓ Choose the category of the first budget item you are entering. (There are nine budget categories: Personnel, Fringe Benefits, Consultant Services, Equipment, Supplies, Travel and Subsistence, Rental of Facilities, Alterations and Renovations, and All Other Expenses.)
    - o For each category, **the mandatory fields** are: Description, Number, Unit Cost, and Justification.
    - o If entering Equipment, an AEL Number is also mandatory. (There is a link to the AEL if you need to look up the number)
    - o Mandatory data must be entered before the record can be saved.
- ✓ When finished with entering the budget item, click on *Save*.
- ✓ The screen will refresh and *Add Funding Allocation for This Budget item* button will appear.



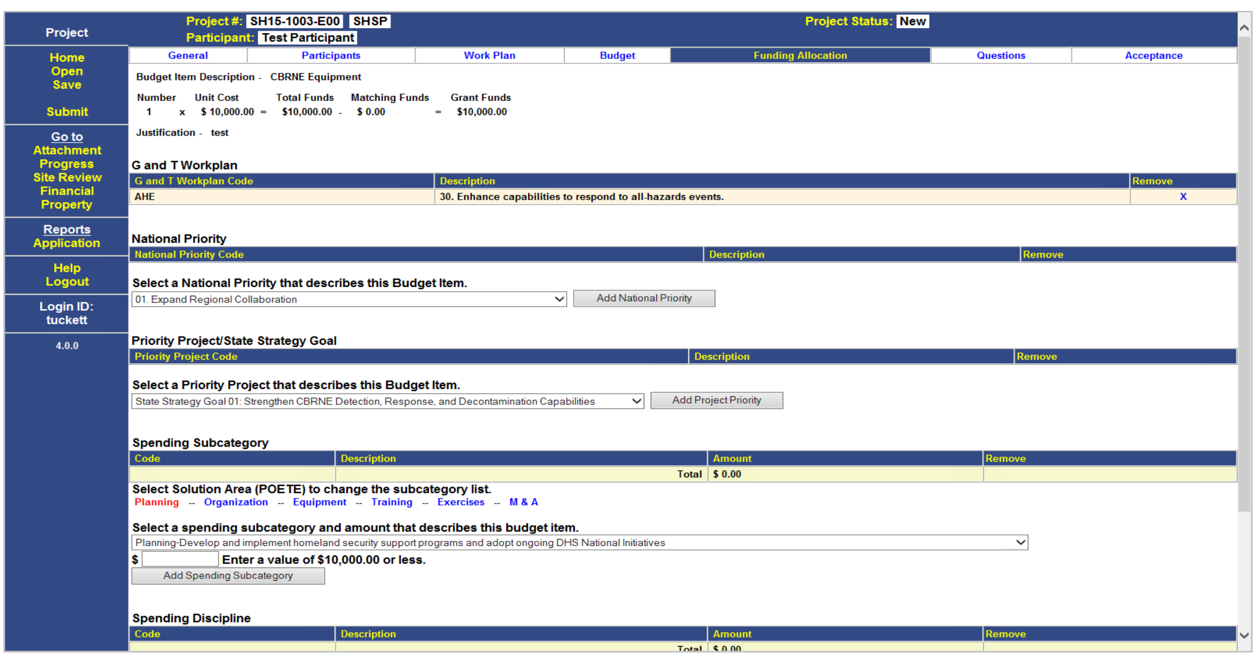
Budget Tab

Funding Allocation Tab

- ✓ Click on *Add Funding Allocation for This Budget item.*
  - Screen will advance to Funding Allocation Tab
  - **You must have entered a budget item before you can enter funding allocation data.**

G&T Work Plan Code

- ✓ Click on the drop-down box to choose a G&T Work Plan Code that best describes that budget item. (Only the G&T Work Plan Codes that you selected on the Work Plan Tab will appear)



Funding Allocation Tab

National Priority

- ✓ Click on the drop-down *box* to choose a National Priority that best describes that budget item.

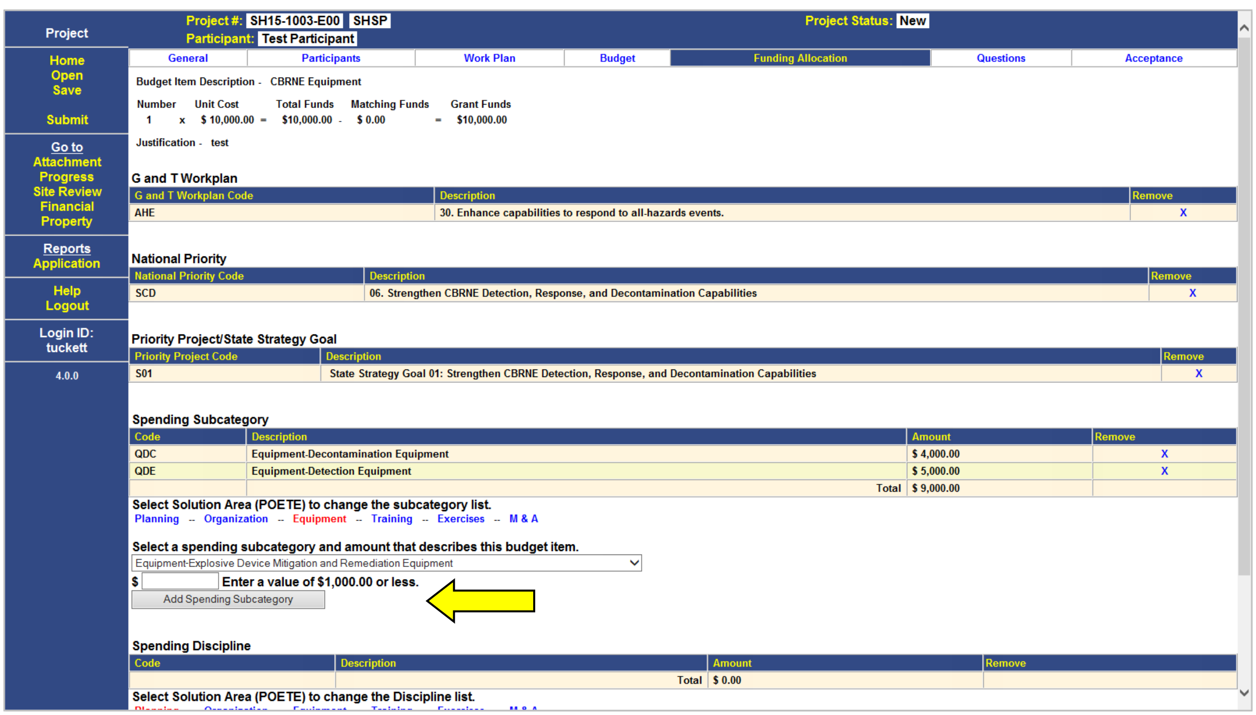
Priority Project/State Strategy Goal

- ✓ Click on the drop-down *box* to choose a Priority Project/State Strategy Goal that best describes that budget item.

Spending Subcategory

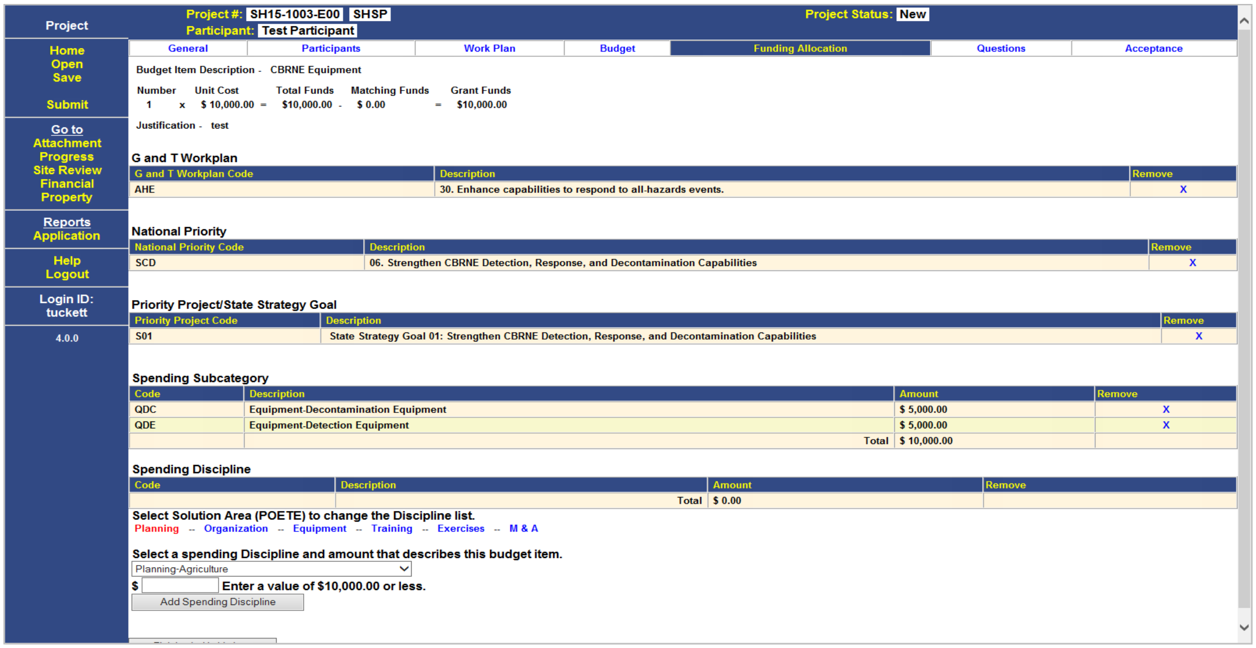
You must select a Spending Subcategory/Solution Area that describes the budget item. Only the Subcategory/Solution Area that matches the Funding Program (i.e., SHSP, LETPP, EMPG, etc.) will be listed.

- ✓ Click on the *Solution Area Heading (Planning, Organization, Equipment, Training, Exercise, M & A)* that appears in red or blue.
- ✓ The screen will refresh and then click on the drop-down to select the subcategory.
- ✓ After selecting the subcategory, enter the dollar amount being allocated to that subcategory.
  - o **You may select multiple Solution Areas/Subcategories per budget item, but only one G&T Work Plan Code per budget item.**
  - o **The total dollar amount of the subcategory MUST equal the budget item. (Example below shows selecting two subcategories totaling $9,000 – budgeted item was $10,000.00. Notice there is still a field *Enter a value of $1,000.00 or less*. You will need to correct this to be able to submit your application later.)**



Funding Allocation Tab

  - o **Example below shows selecting subcategories that match the budgeted item. Notice there is no longer a field *Enter a value of $ or less*.**

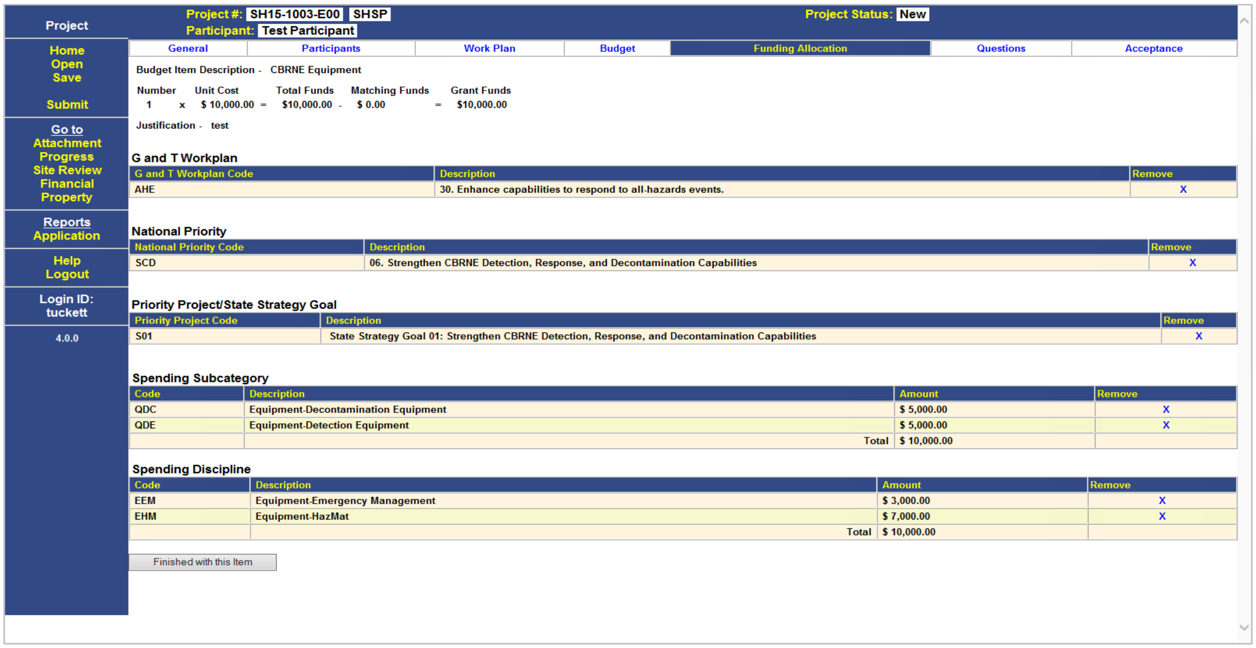


Funding Allocation Tab/Solution Area

Spending Discipline

You now enter the Spending Discipline for each Solution Area (Planning, Organization, Equipment, Training, Exercise, M & A) that you choose previously.

- ✓ Select the *Solution Area Heading (Planning, Organization, Equipment, Training, Exercise, M & A) that appears in red or blue.* The screen will refresh and then click the drop-down box to select the Discipline.
- ✓ Enter the dollar amount being allocated to that Discipline.
  - ○ **You must select the same Solution Areas you chose when allocating money to the Subcategory. And the dollar amounts must match. In regards to the above example, you must choose an Equipment Discipline for $10,000**



Funding Allocation Tab/Spending Discipline

- ✓ Click *Finished with this Item* when the Funding Allocation is completed. You will get an error message until the three fields (Budget, Spending Subcategory and Spending Discipline) equal.
- ✓ You will be brought back to the Budget Tab to enter another budget item. Repeat the above steps for each budgeted item.

Questions Tab – If applicable

When a funding program is selected (in the initial step for creating a project) several questions may be generated if required by that program. These questions will be displayed under this tab for the applicant to answer.

- ✓ Click on the *Questions* tab.
- ✓ Click on the question link and enter the answer in the answer text box.
- ✓ When done, click on *Save*.

Acceptance Tab

- ✓ ***Click on the* Acceptance *tab.***
- ✓ Assurance #1 must be certified before the application can be submitted.
- ✓ Click on the *Assurance.*
- ✓ When finished reading and accepting the Assurance, click on the *Certify* button. The screen will refresh and your name will appear with today's date.

Note: The Appendices will not be certified at this time as the project is still an application. Accepting the Appendices is done by the Signatory when the project goes to contract.

Submitting a Grant

To submit a grant, follow the steps below:

- ✓ Log in to the DHSES E-Grants.
- ✓ Click on the *Project* option from the DHSES E-Grants main menu.
- ✓ Select the project.
- ✓ Check that the application is filled out completely.
- ✓ In the *Attachments* module, add any attachments that are relevant to the project (see Attachment module below).
- ✓ In the left frame under *Save* click on the word *Submit*. If any required fields have been left blank, DHSES E-Grants will generate a printable Required Fields Report to guide you in finishing the application.
- ✓ A pop-up window will appear letting you know that the application was successfully submitted and the status will change from "New" to "Application Received".
- ✓ DHSES and the signatory contact will be notified that the application has been submitted and <u>all the fields will be locked to the subrecipient.</u>

What to Expect After Submission

Following notification that a grant application has been submitted, DHSES staff will review the application for completeness and, in the case of competitive grants, eligibility for funding. DHSES may notify the subrecipient to edit and resubmit the application, **if necessary**, and areas requiring additional or altered information (noted by a red-colored 'Deficiency' flag on the page or module) will be reopened to the subrecipient for editing. The subrecipient may view the status of their application or grant contract by simply logging into DHSES E-Grants.

Attachment Module

The Attachment module contains any documentation that the subrecipient wishes to include with their submission.

Prospective and continuing subrecipients can include electronic submissions of any project documentation associated with their project.

The DHSES staff can view any documentation submitted by subrecipients that would be associated with a project.

Accessing the Attachment Grid

To access the DHSES E-Grants Attachment module:
- ✓ Log in to the DHSES E-Grants.
- ✓ Click on *Project*
- ✓ Click on the *Project #* (displayed in blue).
- ✓ Click on the *Attachment* link on the left frame of the E-Grants Welcome page. The Attachment grid will then display on the right frame of the screen

To Add Attachments

- ✓ Click on the *New* button.
- ✓ **Either** click on the *Browse* button and select the appropriate file, **Or** type in the path and name of the file you wish to attach.
- ✓ Click on *Upload.*

The file will be uploaded and a message will appear to that effect. You may upload more files or click on *Go Back to List* to return to the list of attachments associated with that project.

Accessing Specific Attachments

To access an Attachment data for a specific Project,
- ✓ Log in to the E-Grants.
- ✓ Click on the *Project #* (displayed in blue).
- ✓ Click on the Attachment link.
    - o A list of the Attachments for that project will then be displayed. If there are no Attachments displayed then that project does not have any attachments.

The data in the Attachment List grid is presented in tabular format showing three columns of information. These columns are: Attachment #, Entered Date, and Attachment Name.

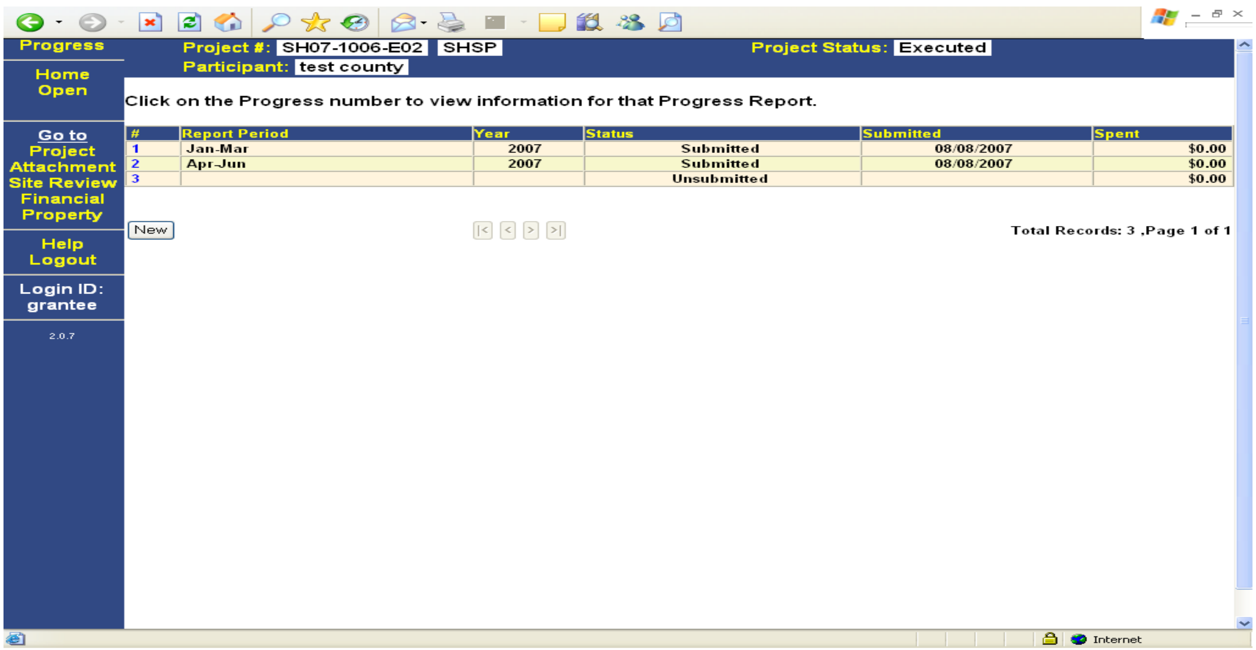
- ✓ Click on the *Attachment Name* (displayed in blue). The attachment will load into a separate browser frame.
- ✓ To return to the list of attachments, click on the *X* in the upper right hand corner of the Attachment's text.

Progress Report Module

The Progress module of the DHSES E-Grants contains progress reports created and submitted by the subrecipient during the length of the project. Subrecipients can create, read, update and submit information however, after a progress report has been submitted, the subrecipient has only read rights to that progress report.

To access the DHSES E-Grants Progress module:

- ✓ Log in to the DHSES E-Grants.
- ✓ Click on the *Project* link on the left frame of the Welcome page.
- ✓ Select the specific project # from those listed.
- ✓ Click on the *Progress* link on the left frame. A list of Progress Reports that have been submitted will be displayed.



Initial Screen of the Progress Report Module

- ✓ Click on *New* to create a new progress report or to open an existing report, click on the corresponding number.

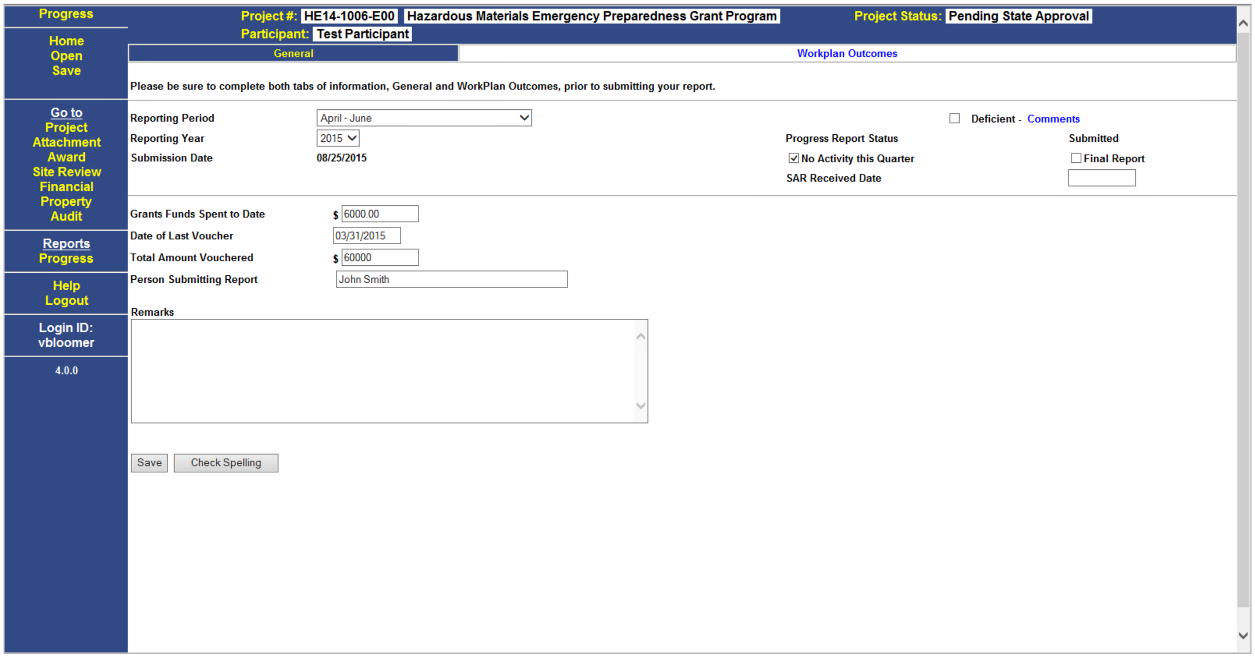
Progress Reports Module	
Column Title	**Definition**
#	Sequential number for the Progress reports
Report Period	The time period the report covers.
Year	The year of the report.
Status	Whether the progress report has been submitted or not submitted.
Submitted	Date that the Progress Report was submitted.
Spent	The amount of DHSES funds that has been spent.

The data in the Progress Report module's sections (tabs) are:

Project Report Module's Tabs	
Tab	**Information**
General	Reporting Period, Reporting Year, Submission Date, Progress Report Status, Final Report Indicator, SAR Received Date, Total Amount Spent, Person Submitting

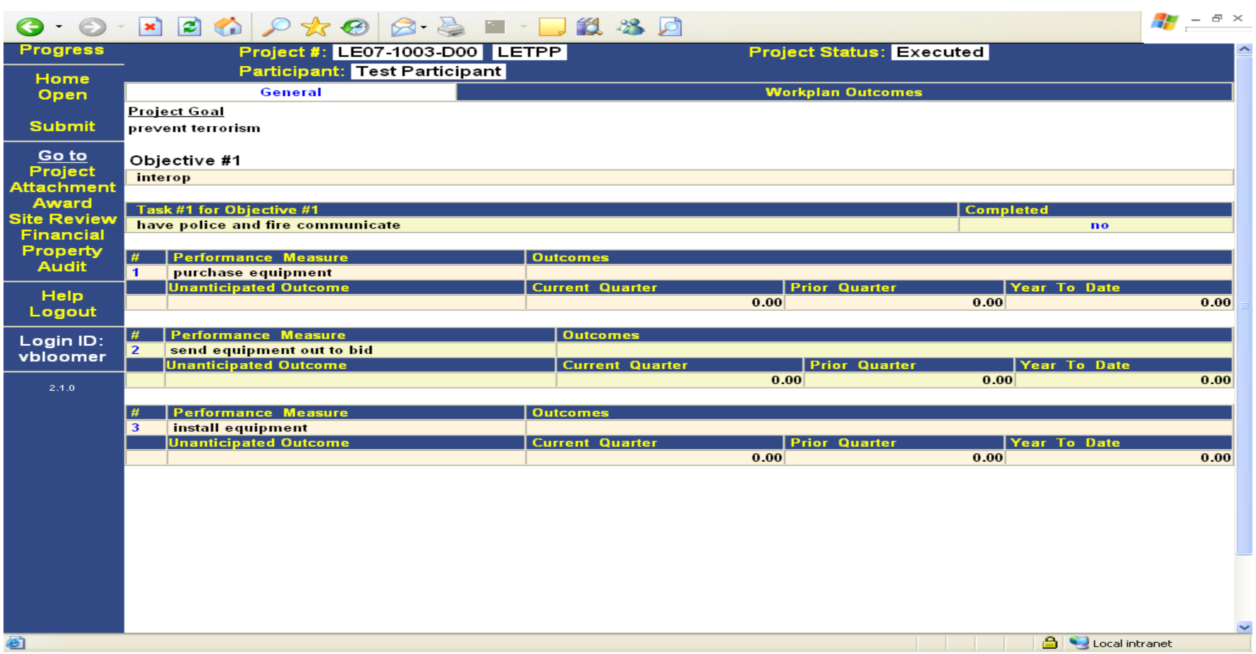
	Report, and Remarks
Workplan Outcomes	The Project Goal, Objectives and Tasks are listed.

- ✓ Fill in the following fields: Reporting Period, Reporting Year, Total Amount Spent, Person Submitting Report, Remarks and if Final Report, check the Final Report Box.
- ✓ Click on the *Save* button at the bottom of the screen when all the information has been added. (Or click on *Save* on the left side of the screen.)



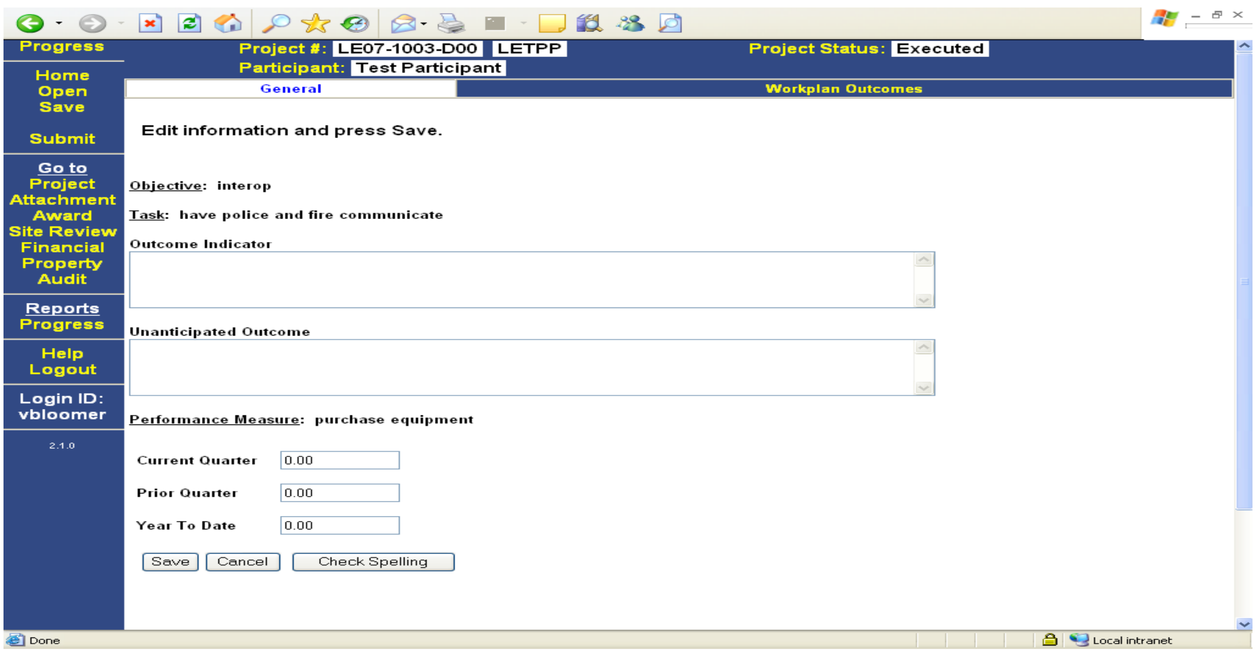
General Screen of the Progress Report Module

- ✓ Click on the *Workplan Outcomes* Tab. The Project Goal is at the top of the page followed by the Objectives and their associated Tasks and Performance Measures. (This information is what you entered at application phase).



- ✓ Click on the Performance Measure (# in blue). The screen will refresh to record your progress for the current quarter with Outcomes, Unanticipated Outcomes and the dollar figures for Current Quarter, Prior Quarter and Year to Date, if applicable.

  Note: You must address each performance measure.



Specific Workplan Outcome in the Progress Report Module

- ✓ Click on the *Save* button at the bottom of the screen when all the information has been added. (Or click on *Save* on the left side of the screen.)
- ✓ When the information is complete, click on the *Submit* button in the left side frame of the screen.
  - Once the Progress Report is submitted, no changes can be made.
- ✓ Click the *OK* button on the dialog box to confirm that this progress report is to be submitted.

Remember, only an <u>unsubmitted</u> progress report can be edited.

Site Review Report Module

The Site Review module of DHSES E-Grants contains the documentation of official site visits made by DHSES personnel. A subrecipient can only read items in this module.

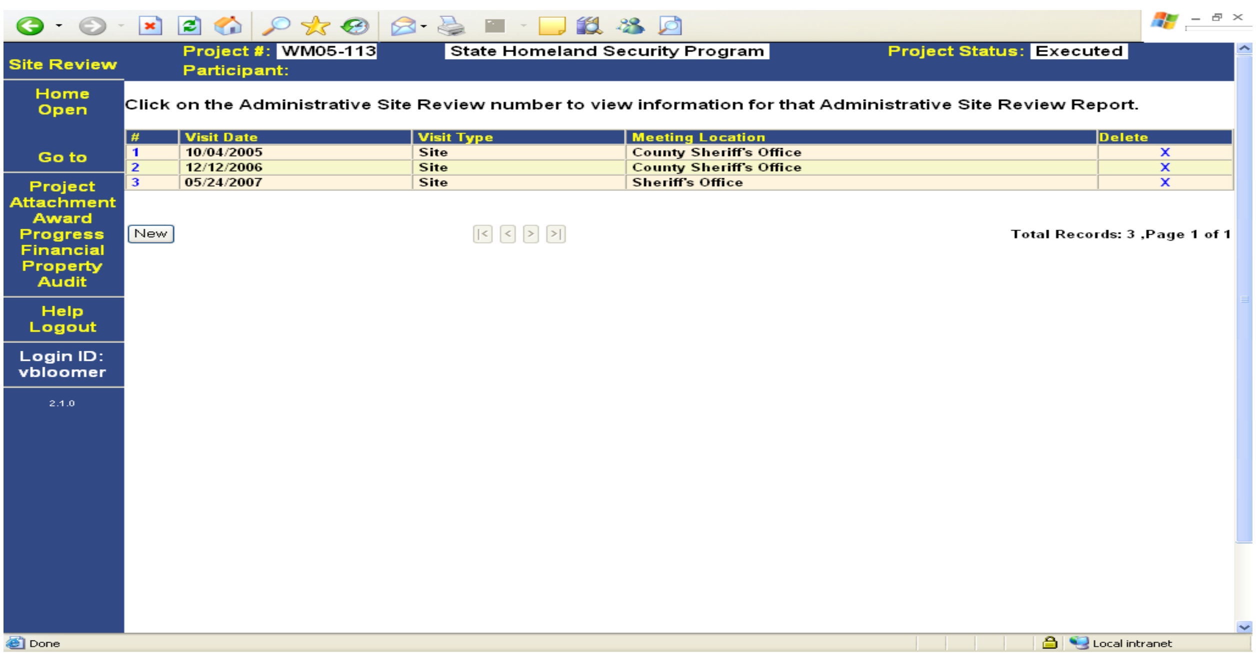
Accessing the Site Review Grid

To access the DHSES E-Grants Site Review module:

- ✓ Log in to the DHSES E-Grants.
- ✓ Click on *Project* on the left frame of the Welcome page.
- ✓ Click on the specific *Project #* (displayed in blue) from those listed to open that project.
- ✓ Click on *Site Review* in the left frame

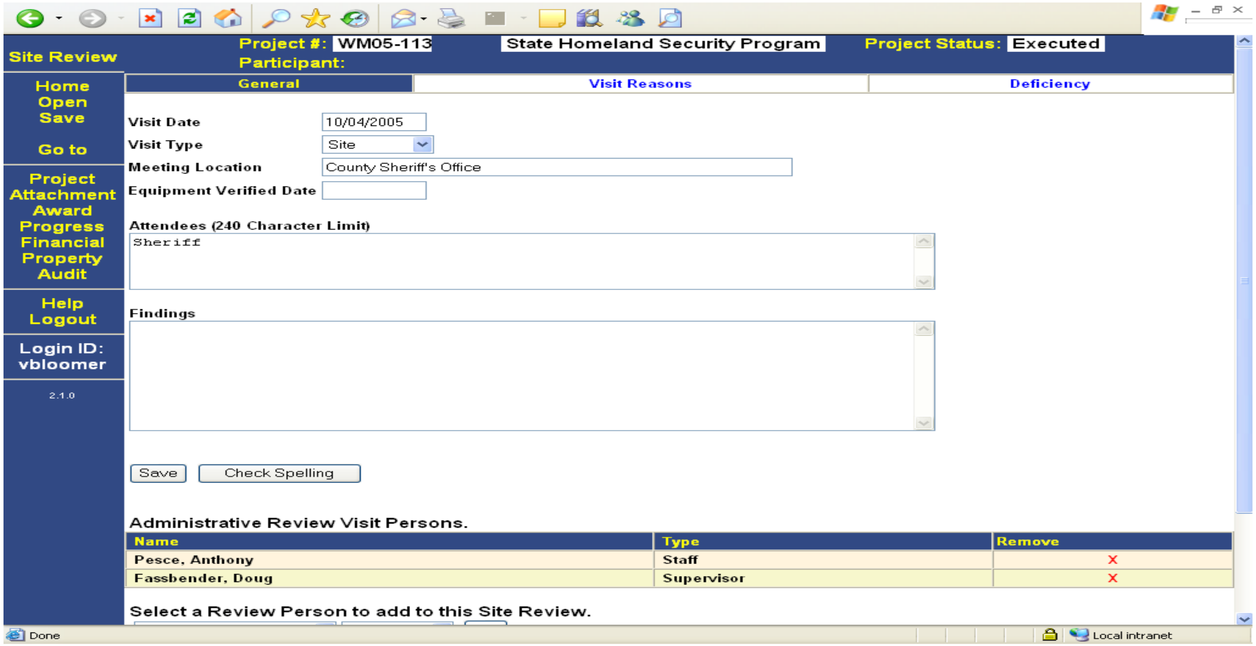
  - o The data in the Site Review Report screen is presented in columns of information:

Site Review Column Definitions	
Column Title	**Definition**
#	Sequential number for Site Review reports
Visit Date	The date the visit took place.
Visit Type	The type of visit report – site, telephone, desk audit, or blank.
Meeting Location	The place the meeting was held.



Site Review Screen

- ✓ Click on Number in blue to access a specific Site Visit.



Site Visit Screen

Financial Report Module

Financial Report Module is currently under construction.

Property Report Module

The Property Report module contains reports of any purchased property or equipment associated with the grant funds (equipment is defined as durable [non-consumable] goods with a value of $5,000 or more).

Subrecipients can view, enter, submit and print an Equipment Inventory Report pertaining to grant funded property purchases associated with their project during the life of the grant. The DHSES staff can view a subrecipient's property report.

Accessing the Property Reports Grid

To access the DHSES E-Grants Property Reports module:

- ✓ Log in to the DHSES E-Grants.
- ✓ Click on *Project* in the left frame of the Welcome Screen.
- ✓ Click on the specific *Project #* (displayed in blue) from those listed.
- ✓ Click on *Property* in the left frame of the Welcome Screen.
- ✓ A list of the Property Reports for that project will then display in the right frame of the screen. If there are no Property Reports displayed, then that project does not have any Property reports recorded.

    - o The data in the *Property Report Screen* is presented in columns of information:

Property Reports Initial Screen	
Column Title	**Definition**
#	Sequential number for the Property reports
Serial #	The serial number of the piece of property, if applicable.
Property Description	A description of the property.
Participant	Party that provided the funds for purchase of this piece of property.
Status	Whether the property is in active use, or has been disposed of.
Cost	The original cost of the property.

- ✓ To access a specific Property Report Record, click on the # or the *Serial #* (displayed in blue). That Property Report will then display in the right frame of the screen.
    - o The top part of the screen has text boxes for the property's/equipment's description, location, condition, etc.
    - o The middle section has text boxes for the participant that provided the funds for purchase and text boxes for the serial, model and other ID numbers.
    - o The bottom section has the information for property disposal and comments.

Creating a New Property Report in DHSES E-Grants

- ✓ Click on *New Property* button at the bottom of the screen.
- ✓ The *Property Description* screen will be displayed. Fill in the appropriate information. Click on the *Save* button at the bottom of the screen when all the information has been added. (Or click on *Save* on the left side of the screen.)
- ✓ Repeat this process for each piece of property to be added.

Reports

DHSES E-Grants provides a series of pre-constructed reports for subrecipients and DHSES use (note that these reports open a new browser window).

- Application - A hard-copy version of the grant application that may be printed for filing.
- Deficiency - A report displaying all fields in the application, with notations for those that have been flagged as 'deficient' by DHSES staff.
- Draft Contract – A printable version of your draft contract
- Final Contract – A copy of your executed contract which may be printed or saved..

Glossary

Attachment Module	The DHSES E-Grants system provides the ability for the subrecipient to upload any documentation that the subrecipient wishes to include with their submission.
Award	The allocation of State or federal grant funds to a particular subrecipient
Budget	Fiscal information the subrecipient submits as a spending plan for the proposed project; later, the agreed-upon spending plan for the project as incorporated into the contract.
Budget Version	DHSES E-Grants allows the subrecipient to enter multiple budgets for a project. For example, a collaborative project undertaken by a consortium of agencies might make it necessary for a subrecipient to enter the budget for each agency (participant) separately. Each budget is a separate version.
Contacts	Those individuals associated with a grant-funded project that have specific duties; those individuals with who DHSES staff would need to interact during the course of a grant contract (see Primary, Fiscal, Signatory, Alternate).
Contract	A binding agreement between NYS and a subrecipient for the sub-award of State or Federal grant funds.
Contract number	A DHSES-assigned number that identifies a grant contract.
Deficiency/Deficient	An area in an application or progress report that DHSES staff have determined is incomplete or requires revision before an application can be approved, a contract written, or a progress report accepted.
DHSES	NYS Division of Homeland Security and Emergency Services
DHSES E-Grants	An electronic Web-based application that allows a user to enter, view and maintain data in relationship to their grant contract.
DHSES Number	A DHSES assigned number that identifies a grant award: includes the Funding Program Funding Year and Contract Number.
Financial Module – Under Construction	The DHSES E-Grants area that captures a record of the Fiscal Cost Reports submitted by the subrecipient throughout the life cycle of the award.
Fiscal Contact	Individual primarily responsible for the Fiscal record keeping and reporting associated with a grant-funded project.
Funding program	A particular source of State or Federal Funding
Grantee (subrecipient)	A municipality, unit of government or not-for-profit organization that has received State or Federal funding through DHSES.

Implementing Agency	The agency (ies) or entity (ies) that will carry out the tasks outlined in the award contract Appendix D - Project Work Plan.
Outcomes	The end-result of activities undertaken to accomplish the objectives and tasks (e.g., number of clients served, a narrative description of a task in progress, a narrative explanation of a delay in completing a task).
Participant	An agency involved in conducting the business of a grant-funded Project; Grantee and/or Implementing Agency.
Performance measure	The yardstick by which a subrecipient will measure its performance in accomplishing project objectives and tasks.
Primary Contact	Individual who has principal responsibility for the operation of a grant-funded project.
Program Representative	The DHSES staff person with primary responsibility for a particular grant contract
Progress Report Module	The DHSES E-Grants area that captures progress report information submitted by the subrecipient during the length of the contract.
Project	A specific activity to be supported by State or Federal grant funds.
Project Module	The DHSES E-Grants area that captures the information that is provided by an applicant when requesting funds as part of a grant application.
Project number	A DHSES E-Grants System-assigned number that identifies a Project; includes Funding Program and funding year.
Property Module	The DHSES E-Grants area that captures data on property or equipment purchased with grant funds (equipment is defined as durable [non-consumable] goods with a value of $5,000 or more).
Questions	Program-Specific Questions; under most funding programs, DHSES requires information on specific issues in order to consider an application for funding; the Questions area is designed to solicit that information.
Save	A function that allows you to secure data you have already entered. Does not transmit data to DHSES.
Signatory Contact	Individual with signing authority for a subrecipient agency; signs the grant contract on behalf of the subrecipient agency or entity.
Site Review Module	The DHSES E-Grants area that documents official site visits made by DHSES personnel.
Submit	In DHSES E-Grants, the function that transmits entered data to DHSES. Following a submit, edits by the subrecipient are no longer possible.
Subrecipient (grantee)	A municipality, unit of government or not-for-profit organization that has received State or Federal funding through DHSES.

Tab	In DHSES E-Grants, a series of hyperlinked graphics across the top of a screen, analogous to the tabs in a 3-ring binder; enables easy navigation.
Work Plan	The Goals, Tasks and Objectives that make up a grant-funded project; those activities the subrecipient agrees to complete in the contract.