



Montana

Office of Public Instruction

Leveraging ESSER Funds - Virtual Conference
E-Grants Amendments and Cash Requests

Prepare, Prevent, and Respond

August 9, 2022



Goals For This Session

- Templates & Exercises
- Budget Pages
- Amendments
- How to See Feedback
- Cash Requests
- Problem Troubleshooting
 - Unlock Page
 - Pop-Up Blockers
 - Error Messages
- Wrap-Up and OPI Resources





E-Grant Amendments and Cash Requests – Session Description

In this session:

- How to prepare amendments and to review past status
- Using a template to make change easier
- Help navigate history of amendments/cash requests
- Review text/comments if an amendment/cash request is returned

Presenter:

Mindi Askelson, Grant Management Systems Analyst

Rebecca Brown, ESSER Program Manager

Catlin Clifford, Account Grant Manager

TEMPLATES

What do I need to say?
How do I need to say it?

E-Grants Templates

- These templates have been developed for a consistent, efficient grant review process
- Follow the template so the approval process is smoother and more efficient
- Templates help establish an **audit trail**
 - When an auditor comes in and looks at your grant, it's easy to see exactly what the money was being used for, and how it relates to the grant requirements

E-Grant Budget Template

- ✓ Object Code
- ✓ Purpose Category
- ✓ Use of Funds
- ✓ Expenditure Description:
 - ✓ For the purpose of / to purchase [xxxx]
 - ✓ In response to [xxxx related to covid]
 - ✓ To prevent [xxxx related to covid]
 - ✓ To prepare for [xxxx related to covid]
 - ✓ Specifically, how does it relate to **student gains?**
- ✓ \$\$ Amount

Cash Requests will need to use the same language as your Budget / Amendments, so make sure you are consistent!

For Capital Expenditure projects we recommend using a Project Scope/Word Document to keep all your information in, and then copy-and-paste from that into your Budget/Amendment/Cash Requests.

In Budget, categories 100 and 200 should have matching personnel descriptions!

E-Grant Budget Template

A good Budget example could look like this:

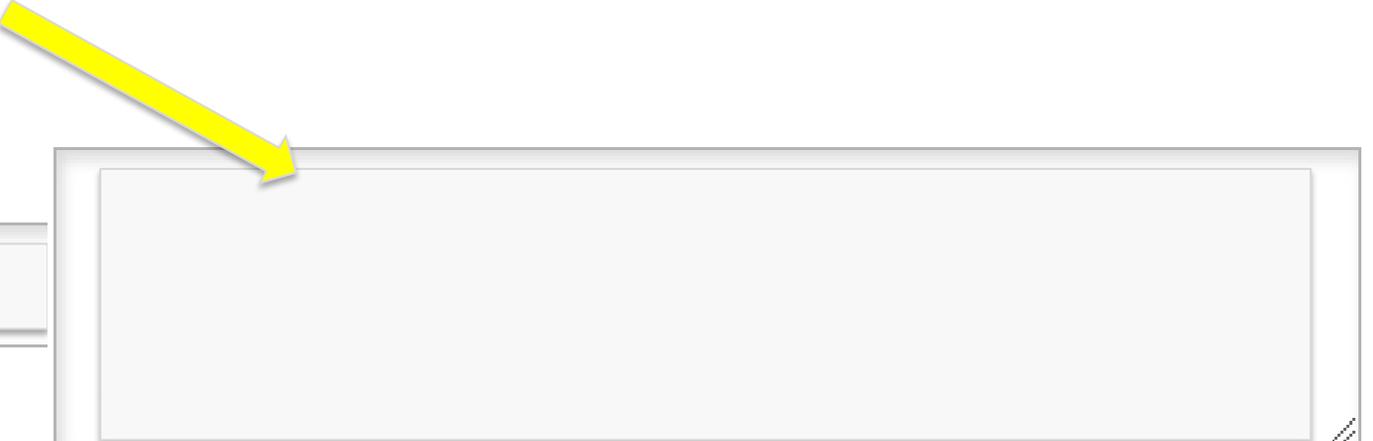
600 Supplies	10 Instruction	Supplemental Learning	10-Instruction - cost for supplies to provide summer time programming focused on Math enrichment in order to address the personal and academic challenges Montana students face that have been exposed and exacerbated by the covid-19 pandemic.
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Exercises – Using these Templates

Use the template to rewrite these examples:

Budget Line Item:

Chromebooks for students, SMART flat panel interactive boards for classrooms

600 Supplies	10 Instruction	Technology	
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Exercises – Using these Templates

Rewritten using template:

Budget Line Item:

20 Chromebooks for student/faculty remote learning in response to Covid-19, 3 SMART flat panel interactive boards for student/faculty use for ease of sanitation to prevent transmission of infection

600 Supplies	10 Instruction	Technology	
--------------	----------------	------------	--

E-grant Amendment Template

- ✓ From [category] / [\$\$amount]
- ✓ To [category] / [\$\$amount]
- ✓ For the purpose of/to purchase [xxxx]
- ✓ In response to [xxxx related to covid]
- ✓ To prevent [xxxx related to covid]
- ✓ To prepare for [xxxx related to covid]
- ✓ Specifically, how does it relate to **student gains?**

Cash Requests will need to use the same language as your Budget / Amendments, so make sure you are consistent!

For Capital Expenditure projects we recommend using a Project Scope/Word Document to keep all your information in, and then copy-and-paste from that into your Budget/Amendment/Cash Requests.

E-Grant Amendment Template

A good Amendment example could look like this:

“From 100/Salaries/\$10k and 200/Benefits/\$2k to 600/\$12k to purchase laptops for students, **responding** to the need for online learning to **prevent** further loss of learning/attendance due to covid-19”



Exercises – Using these Templates

Use the template to rewrite these examples:

1. Amendment: We need to increase the supplies line to include the purchase of a pottery wheel
2. Amendment: Reallocation of funds from benefits to instructional supplies
3. Amendment: Updated budget detail to reflect expenditures and cash requests



Exercises – Using these Templates

Rewritten using template:

1. Amendment: From 100/\$1k to 600/\$1k to purchase pottery wheel to increase student access, improve social distancing, and prevent transmission of infection
2. Amendment: From 200/\$2k to 600/\$2k to purchase student Chromebooks to respond to need for remote learning due to Covid-19
3. Amendment: From 100/\$10k and 200/\$2k to 600/\$12k to purchase ABC Math Curriculum to respond to student learning loss due to Covid-19. Updated to reflect actual AY 2020-21 expenditures and cash requests

E-grant Cash Request Template

- ✓ From [category] / [\$\$amount]
- ✓ For the purpose of/to purchase [xxxx]
 - ✓ This must connect to what is already in the grant budget/amendments
- ✓ In response to [xxxx related to covid]
- ✓ To prevent [xxxx related to covid]
- ✓ To prepare for [xxxx related to covid]
- ✓ Specifically, how does it relate to **student gains?**
- ✓ Again, this must match what is already in the grant budget/amendments!

E-Grant Cash Request Template

See in this example how the Budget and Cash Request language is the same!

Budget:

600 Supplies	10 Instruction	Supplemental Learning	10-Instruction - cost for supplies to provide summer time programming focused on Math enrichment in order to address the personal and academic challenges Montana students face that have been exposed and exacerbated by the covid-19 pandemic.
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Cash Request:

600	600 - supplies purchased for summer program and instruction in support of mitigating math learning loss due to pandemic and summer out of school time.	\$1,900	\$0	1900
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Exercises – Using these Templates

Use the templates to rewrite this example:

Cash Request: 400 – *Minimize Spread of Infection* - Remove the old existing carpet and replacing it with a linoleum/tile



Exercises – Using these Templates

Rewritten using template:

Cash Request: 400 – *Minimize Spread of Infection* – Removal of existing carpet and replacing with linoleum/tile for ease of sanitation to prevent transmission of infection

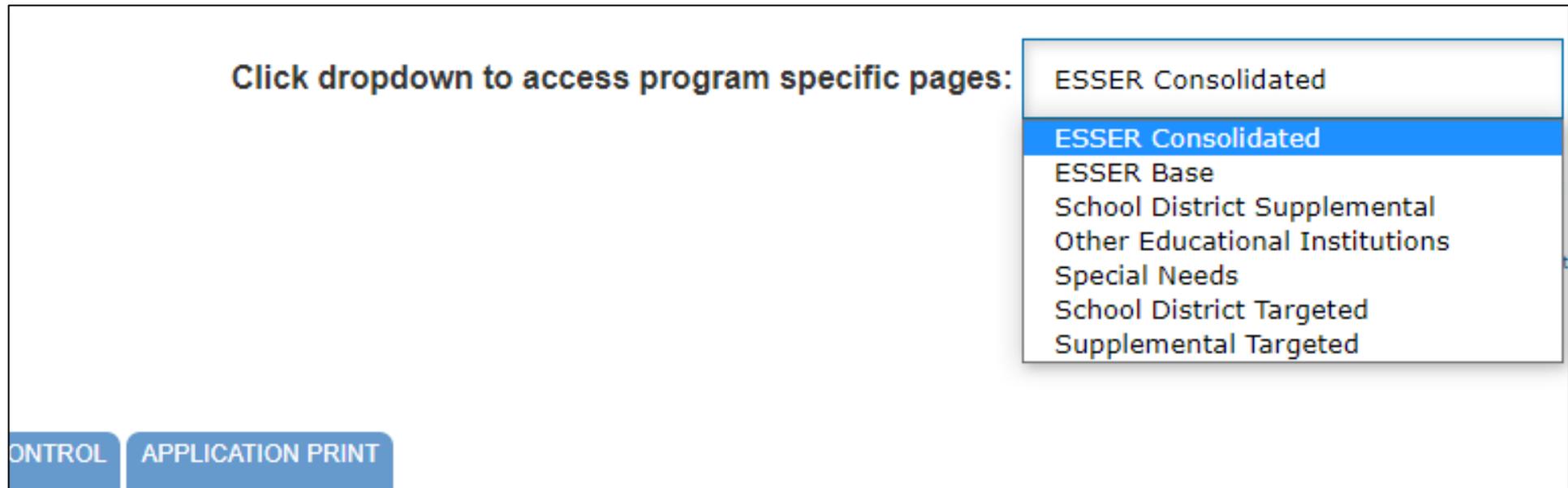
BUDGET



How do I See what was Allocated?

Budget Pages – ESSER I, II, and III

- Different Budget Page for each Program
- In the top right-hand side of the application page, there is a drop-down menu where you can find your different budget pages

A screenshot of a web application interface. The main content area contains the text "Click dropdown to access program specific pages:". To the right of this text is a dropdown menu that is open, showing a list of budget page options. The first option, "ESSER Consolidated", is highlighted in blue. Below the dropdown menu, there are two blue buttons: "CONTROL" and "APPLICATION PRINT".

Click dropdown to access program specific pages:

- ESSER Consolidated
- ESSER Consolidated**
- ESSER Base
- School District Supplemental
- Other Educational Institutions
- Special Needs
- School District Targeted
- Supplemental Targeted

CONTROL APPLICATION PRINT



Budget Pages – ARP Summer and ARP Afterschool

In these 2 grants, there is a blue tab at the top named “Budget Pages”

The image shows a screenshot of a web application interface with a navigation bar. The navigation bar consists of several blue tabs with white text. From left to right, the tabs are: 'ARP AFTERSCHOOL INFORMATION', 'CONTACT INFORMATION', 'ALLOCATIONS', 'PROGRAM DETAIL', and 'BUDGET PAGES'. The 'BUDGET PAGES' tab is highlighted with a red circle. Below the navigation bar, there are two more tabs: 'BUDGET DETAIL' and 'BUDGET SUMMARY'. The 'BUDGET DETAIL' tab is highlighted with a red circle. Below the tabs, there is a section titled 'Budget Detail' followed by the text 'BUDGET BREAKDOWN (Use whole dollars only. Omit Decimal Places, e.g., \$'.



Payments Menu

- E-Grants Access Select page...
- Click “Payments” button next to desired grant to see the Payment Summary

Actions	
OPEN	PAYMENTS
REVIEW SUMMARY	

Vendor 0000023560 001

[VIEW CASH REQUESTS/EXPENDITURE REPORTS](#)

Payment Summary as of 8/5/2022

	ESSER_Fund
Current Grant Year Allocation	\$71,623
(+/-) Adjustments	\$0
(+/-) Consortiums	\$20,865
(+/-) Transfers	\$0
Total Funds Available	\$92,488
Approved Budget --Original Application	\$92,488
Anticipated Payments	
Auto-Scheduled	\$0
Cash Requests	\$92,488
Total	\$92,488
Pending Payments	
Auto-Scheduled	\$0
Approved Cash Requests	\$0
Total	\$0
Completed Payments	
Auto-Scheduled	\$0
Cash Requests	\$92,488
Total	\$92,488
Remaining Payments	
Auto-Scheduled	\$0
Cash Requests	\$0
Total	\$0
Final PER Status	

Payments Menu

- Payment Summary menu...
- Click “View Cash Requests/Expenditure Reports” button to see all cash requests for that grant

Vendor 0000023560 001

VIEW CASH REQUESTS/EXPENDITURE REPORTS

Payment Summary as of 8/5/2022

Cash Request/Expenditure Report Menu

[Click for Instructions](#)

Program

Cash Requests:

Select an Cash Request from the list(s) below and press one of the following buttons:

Select	Cash Request	Date Created	Date Submitted	Final Approval Date	Status	Status Date
<input type="radio"/>	Cash Request 1	6/23/2020	6/29/2020	8/7/2020	Approved	8/7/2020

Expenditure Reports:

Select an Expenditure Report from the list(s) below and press one of the following buttons:

Select	Expenditure Report	Final	Date Created	Date Submitted	Final Approval Date	Status	Status Date
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Payments Menu

- View the specifics for individual cash requests
- Select the Cash Request you want to look at
- Click “Open Request” button to see expenditure info

Select	Cash Request	Date Created
<input checked="" type="radio"/>	Cash Request 1	6/23/2020

[OPEN REQUEST](#)

AMENDMENTS

How do I find the History?
How do I find Feedback?



Amendments – Finding the History

How do you see the history of what has happened with this Amendment?

- In the “E-Grants Access Select” page, select either Original Application or the correct Amendment in the drop-down
- Click on “Review Summary” next to the grant
- This will open the “Review Summary” page where you can see who has interacted with the grant

Select Fiscal Year:

Application Name	Revision	Status	Date	Actions
IDEA Consolidated Application	Original Application	Final Approved	9/28/2020	<input type="button" value="OPEN"/> <input type="button" value="Amend"/> <input type="button" value="PAYMENTS"/> <input type="button" value="REVIEW SUMMARY"/> <input type="button" value="Delete Application"/>
ESEA Consolidated Application	Amendment 1	Final Approved <small>View GAN</small>	5/18/2021	<input type="button" value="OPEN"/> <input type="button" value="Amend"/> <input type="button" value="PAYMENTS"/> <input type="button" value="REVIEW SUMMARY"/> <input type="button" value="Delete Application"/>
ESSER Consolidated	Amendment 1	Final Approved <small>View GAN</small>	8/16/2021	<input type="button" value="OPEN"/> <input type="button" value="AMEND"/> <input type="button" value="PAYMENTS"/> <input type="button" value="REVIEW SUMMARY"/> <input type="button" value="Delete Application"/>
ESSER III Consolidated	Amendment 4	Final Approved <small>View GAN</small>	5/3/2022	<input type="button" value="OPEN"/> <input type="button" value="AMEND"/> <input type="button" value="PAYMENTS"/> <input type="button" value="REVIEW SUMMARY"/> <input type="button" value="Delete Application"/>

Review Summary

[Click for Instructions](#)

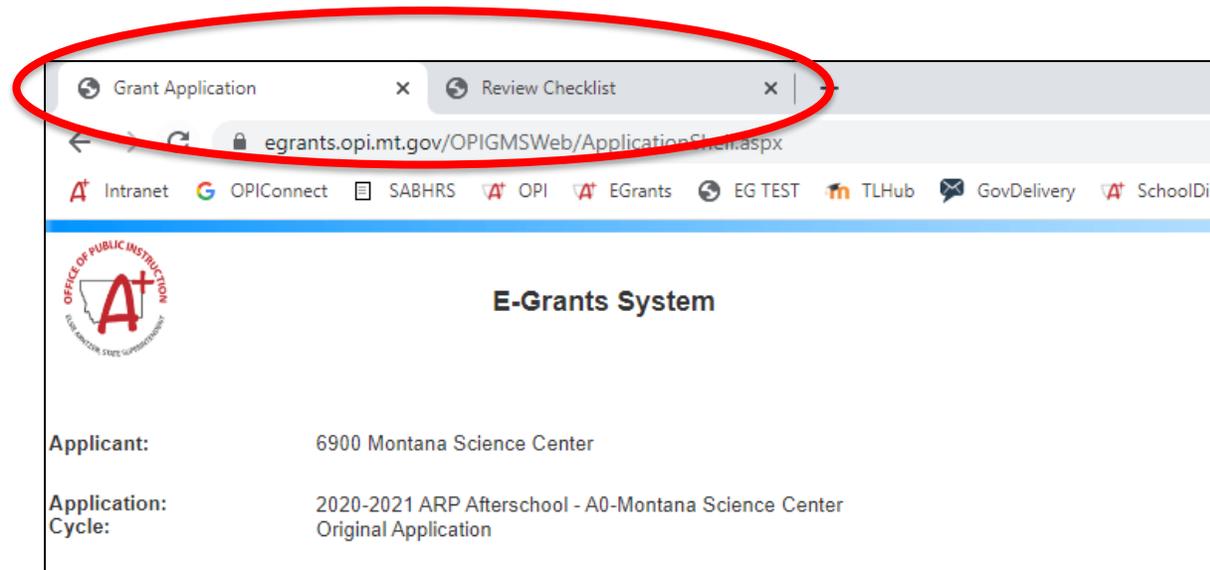
Latest submission to OPI occurred on: 7/18/2022

Round 1					
Select	Stop	Group	Staff	Status	Status Date
	1	LEA Data Entry	<input type="text"/>	Submitted	7/18/2022
	2	LEA Authorized Representative	<input type="text"/>	Submitted	7/18/2022
<input type="radio"/>	3	State Agency Final Review	Rebecca Brown	Accepted	7/29/2022

Amendments – Finding the Feedback

How do you see the Feedback on your Amendment once it's returned?

- In the “Review Summary” page, select the circle next to the SEA Review
- Then select the blue “Review Checklist” button below
- E-Grants will open a **second tab** in your browser – this only works if your pop-up blocker is turned off





Amendments – Finding the Feedback

How do you see the Feedback on your Amendment once it's returned?

- Within the “Review Checklist” page that opens, you will be able to see our comments in the text box

Review Summary

[Click for Instructions](#)
Latest submission to OPI occurred on: 7/18/2022

Round 1					
Select	Step	Group	Staff	Status	Status Date
	1	LEA Data Entry		Submitted	7/18/2022
	2	LEA Authorized Representative		Submitted	7/18/2022
<input checked="" type="radio"/>	3	State Agency Final Review	Rebecca Brown	Accepted	7/29/2022

[REVIEW CHECKLIST](#) [REQUEST CHECKLIST PRINT](#)

1. Is the ESSER Base Budget Detail page reasonable?

Comment (53 of 2000 maximum characters used)

Amendment 3: OK RB
Amendment 2: OK WF
Amendment 1: OK



Turning Off Pop-Up Blockers

Before doing below please approve through your District's security policy.

- For **Google Chrome** choose the three vertical dots in the upper right-hand corner. Click Settings. On the left-hand side select Privacy and Security. To allow cookies click Cookies and other data. Then select Allow all cookies. To allow pop ups click Privacy and Security again. Click on site settings. Scroll down till you see Pop-ups and Redirects and click on that section. Once again you can either allow all or simply add the website you will be using during this process.
- For **Microsoft Edge**, click on the horizontal dots in right hand corner. Click Settings at bottom of drop down. On right hand side select the Cookies and Site permissions. At very top of page click Manage and delete cookies and site data. At top of page select Allow sites to save and read cookie data (recommended). Go back on page. Under the All permissions section click the eighth selection down named Pop up and redirects. From here you have two options. You can allow all or simply add just the website you will be using during the process to the list that allows that site to let through pop ups
- You can view "Turning Off Popup Blockers.pdf" at:
<https://acrobat.adobe.com/link/track?uri=urn:aaid:scds:US:c7094050-554f-46e6-9e18-095f83b1b10c> or
<https://acrobat.adobe.com/link/track?uri=urn:aaid:scds:US:837ea995-9641-4042-ae06-5e7e0e3899f2>



Amendments – Deleting an Amendment

- Only amendments which are in progress, not yet submitted to OPI, can be deleted
- Why would you delete an Amendment?
 - Created by accident
 - No longer want/need to make those changes
- How do you Delete it?
 - Select Amendment to be deleted in dropdown
 - In the E-Grants Access Select page, select the blue “Delete Application” button
 - This button will be grayed out if the Amendment has already been submitted

ESSER Consolidated	Amendment 1	Final Approved	8/16/2021	OPEN	AMEND	DELETE APPLICATION	DELETE APPLICATION	
ESSER III Consolidated	Amendment 4	Final Approved	5/3/2022	OPEN	AMEND	PAYMENTS	REVIEW SUMMARY	DELETE APPLICATION



Where is My Amendment in the Workflow?

These are Status options you may see:

- **Not Submitted** – you haven't submitted it yet
- **Submitted for Local Review** – Application has been submitted to AR
- **Submitted to OPI** – OPI is reviewing
- **Final Approved** – OPI has approved and returned

Application Name	Revision	Status	
IDEA Consolidated Application	Original Application	Final Approved	9/3/2020
ESEA Consolidated Application	Original Application	Submitted for Local Review	8/2/2022
ESSER Consolidated	Amendment 1	Not Submitted	
ESSER Consolidated	Amendment 1	Submitted To OPI	7/26/2022

CASH REQUESTS

Getting the Money once the Grant
is Approved

Cash Requests

- Cash Request Language **Must Match Descriptions in the Grant**
 - Both Budget and Amendments
 - **Audit Trail** – an auditor needs to be able to see direct connections from Budget → Amendment → Cash Request
- 50% Leeway
 - You can request up to 50% above or below what is in the Budget “buckets” without submitting an amendment to change your budget



Cash Requests – Deleting a Cash Request

- Only Cash Requests which are in progress, not yet submitted to OPI, can be deleted.
- Why would you delete a Cash Request?
 - You created it on accident
 - No longer want/need to make the request
- How do you Delete it?
 - In the Cash Requests/Expenditures page, select the unwanted Cash Request
 - Then select the blue “Delete Request” button
 - This button will not be displayed if the Request has already been submitted

Select an Cash Request from the list(s) below and press one of the following buttons:



Select	Cash Request	Date Created	Date Submitted	Final Approval Date	Status
<input type="radio"/>	Cash Request 3	8/5/2022			Not Submitted
<input type="radio"/>	Cash Request 2	6/7/2022	6/7/2022	6/7/2022	Approved
<input type="radio"/>	Cash Request 1	4/14/2022	4/14/2022	5/5/2022	Approved

PROBLEM SOLVING

What Happens When Things Go
Wrong?



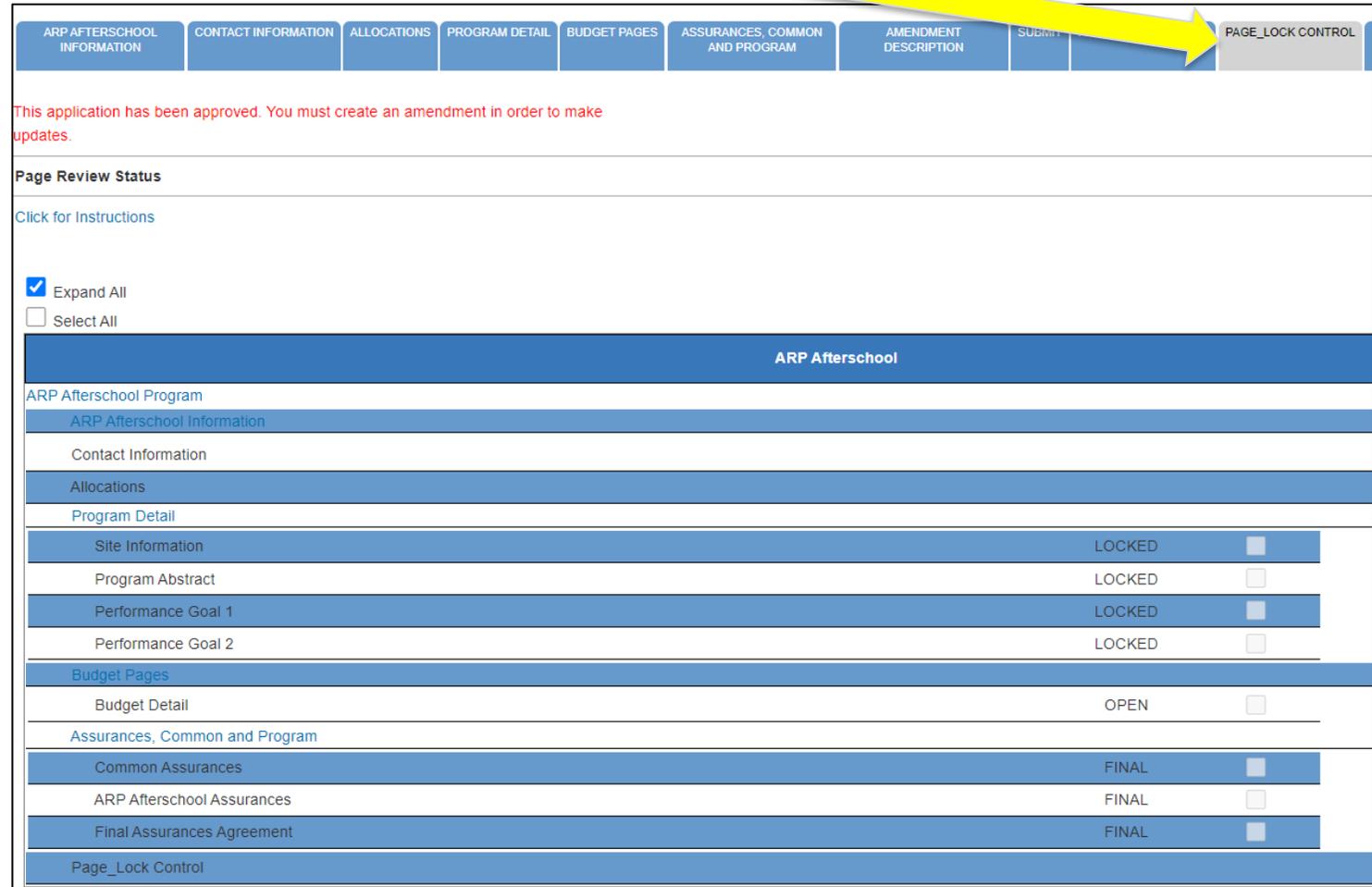
No “Save Page” Button

- If there is not a “Save Page” button at the bottom of your screen, the page is locked and cannot be edited
- You will see a red error message like this at the top of your screen:

This Page is locked. If changes are needed, you must unlock it on the Page Lock Control Tab.
- You need to go into the “Page_Lock Control” tab and unlock your page so it can be edited and saved (See Next Slide)
- Use your Scope Document when filling out grant pages so you can copy-and-paste and you don’t lose your work!

Unlock Page

- Click on the “Page_Lock Control” tab at the top of the screen
- Select “Expand All” to see every tab in the grant
- Unlock the tab you need by checking the box for that tab



This application has been approved. You must create an amendment in order to make updates.

Page Review Status

[Click for Instructions](#)

Expand All
 Select All

ARP Afterschool		
ARP Afterschool Program		
ARP Afterschool Information		
Contact Information		
Allocations		
Program Detail		
Site Information	LOCKED	<input type="checkbox"/>
Program Abstract	LOCKED	<input type="checkbox"/>
Performance Goal 1	LOCKED	<input type="checkbox"/>
Performance Goal 2	LOCKED	<input type="checkbox"/>
Budget Pages		
Budget Detail	OPEN	<input type="checkbox"/>
Assurances, Common and Program		
Common Assurances	FINAL	<input type="checkbox"/>
ARP Afterschool Assurances	FINAL	<input type="checkbox"/>
Final Assurances Agreement	FINAL	<input type="checkbox"/>
Page_Lock Control		



Error Messages

- If you get a **red** Error Message across the top of the screen, read it carefully
- These messages will tell you exactly what needs to be fixed in order to progress forward
- Commonly error messages are:
 - Page is locked;
 - Pages not saved;
 - Assurances pages not completed by AR;
 - Not allowed to submit application due to timeline expiration;
 - Not the AR;
 - Don't have the correct security clearance



Error Messages

If you cannot understand what the Error Message means, you can reach out to your ESSER Team for assistance

Wendi Fawns at wendi.fawns@mt.gov or 406-437-8595

Rebecca Brown at rebecca.brown@mt.gov or 406-444-0783

Mindi Askelson at mindi.askelson@mt.gov or 406-444-0768

Steven Morgan at steve.morgan@mt.gov





Resources at OPI.MT.GOV

Montana Office of Public Instruction



Welcome to the Office of Public Instruction

Superintendent Elsie Arntzen is proud to serve our Montana families, students, and teachers. **Families are the foundation of learning as our parents are our first teachers.** Our students are our most precious resource and the future of this great state. As a teacher of 23 years, the Superintendent knows the importance of quality educators in the classroom and is working to ensure Montana teachers have the flexibility needed to put our Montana students first.

The Montana Office of Public Instruction (OPI) is charged with the responsibility of providing technical assistance in:

- School Finance
- School Law
- Teacher Certification and Licensing
- School Accreditation
- Teaching and Learning Standards

The OPI staff administer a number of federally funded programs and provide a variety of information services, including the information systems necessary to assess student achievement and the quality of Montana's elementary and secondary school systems.

OFFICE OF THE SUPERINTENDENT

MEET EXECUTIVE STAFF

OPI ORGANIZATIONAL CHART

SEE OPI PRESS RELEASES

ESSER



[Wendi Fawns](#)
ESSER/EANS Director

Wendi's grandmothers were elementary teachers and her parents' college professors. They shaped Wendi's passion for learning anywhere, anytime and in varied formats. Wendi has taught dyslexic readers in elementary schools and provided college/career program support to schools and families across Montana. Her career in social work, information technology, and education have centered around helping customers identify goals and gain the resources necessary to succeed. She holds a BA in Sociology with MIS focus and a MA in Education Leadership. She is a strong customer advocate, member of Rotary and P.E.O. International, and mother of a Montana high school teacher and Arizona college advisor.

406-437-8595



[Rebecca Brown](#)
ESSER Program Manager

Rebecca Brown is joining us from the Bozeman School District where she worked as an ICTE instructor, teaching Metals, Woods, and Auto shop classes. Rebecca holds a BS in Technology Education from Montana State University, Bozeman. She has just recently moved to Helena with her husband, cats, and parakeet. Born and raised in Montana, Rebecca feels nothing can beat a gorgeous Montana summer weekend spent camping and floating on the river.

406-444-0783



[Victoria Hoefler](#)
Broadband Data Specialist

Victoria Hoefler relocated to Montana from the Atlanta, Georgia area. Victoria's previous roles in Corporate America include IT Support, Project Management, B2B Client Support, Software Training and Copywriting. In her secondary job, Victoria serves as the Founder and President of a 501(c)3 Charity bringing awareness to mental health needs of Military Veterans and better quality of life for Military Families. She is looking forward to identifying effective ways to improve broadband internet data in the school throughout Montana.

406-438-3601

Thank you!

For questions or additional information please contact:

ESSER Program Questions

Wendi Fawns at wendi.fawns@mt.gov or 406-437-8595

Rebecca Brown at rebecca.brown@mt.gov or 406-444-0783

E-Grants Designer

Mindi Askelson at mindi.askelson@mt.gov or 406-444-0768

Cash Requests

Steven Morgan at steven.morgan@mt.gov

Catlin Clifford at catlin.clifford@mt.gov or 406-444-3692