

Leveraging ESSER Funds – Virtual Conference Navigating E-Grants

Prepare, Prevent, and Respond

August 9, 2022



Goals For This Session

- Login
- Security Changes
- Finding Account Balances
- Finding Review Feedback
- Unlocking Pages
- Contact Pages Welcome to E-Grants
- OPI Website Resources
- OPI Contacts





Navigating E-Grants – Session Description

This session will cover how to turn off your pop-up blockers to allow screens in E-Grants and data report portals to refresh with updated data. In this session login into E-Grants, security changes, and finding account balances will be the major topics covered. The OPI website has a significant amount of information on it. During this session participants will learn where to find FAQs and other support documents helpful in determining allowable uses.

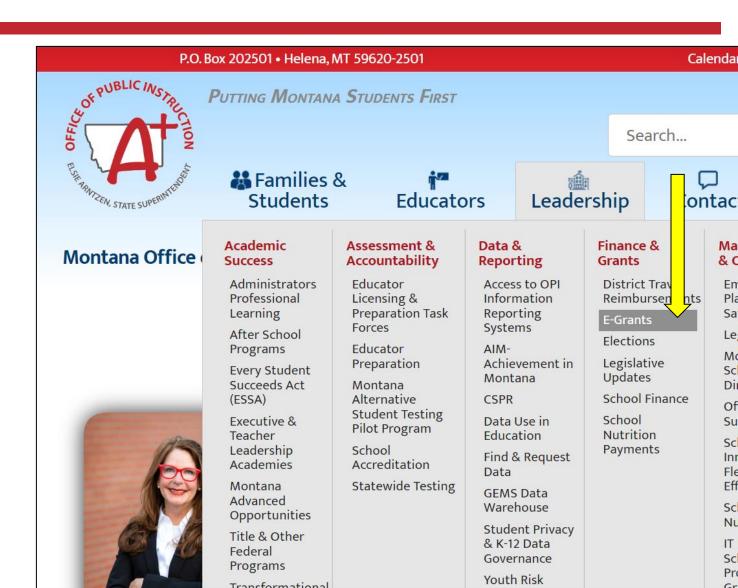
Presented by **Mindi Askelson**, Grant Management Systems Analyst, **Rebecca Brown**, ESSER Program Manager, and **Catlin Clifford**, Account Grant Manager



Logging into E-Grants

- E-Grants can be accessed on the OPI Website by navigating to
 - o Leadership >
 - o Finance & Grants >
 - E-Grants
- The direct link is here:

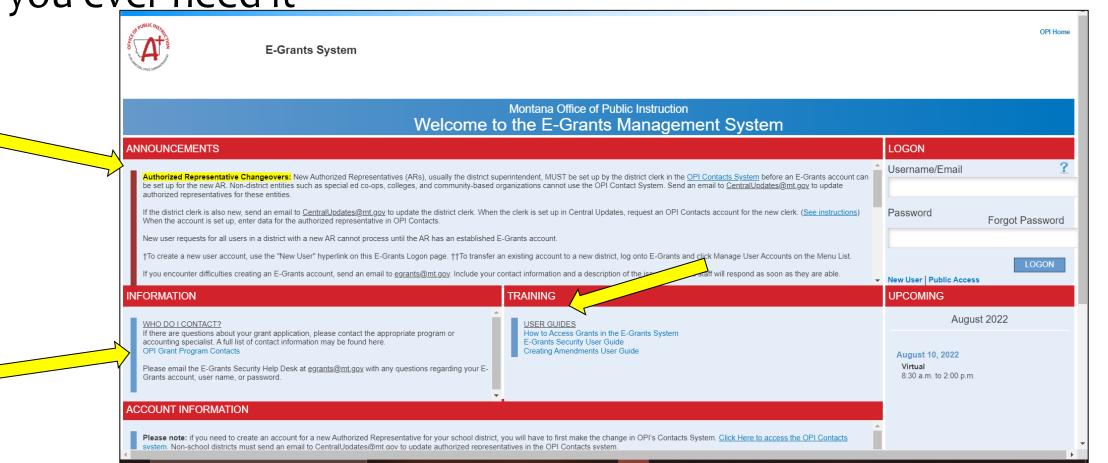
https://egrants.opi.mt.gov/opigmsweb/logon.aspx





Logging into E-Grants

On the E-Grants Login page, there is helpful information in case you ever need it



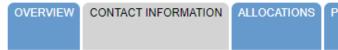


* Denotes required field

Summer Phone

E-Grants Contact Info

When you go into the "Contact Information" tab at the top of your application, you will
see the contact information that was current when the application was submitted



- If you had an Authorized Representative (AR) or Clerk leave, their contact info will remain on the grant because they were the ones who submitted it
- The grey boxes are automatically filled in from OPI Contacts

Email

Authorized Representative:

Last Name
Phone
Phone

Summer Phone

District Clerk/Business Manager:

Last Name
Phone

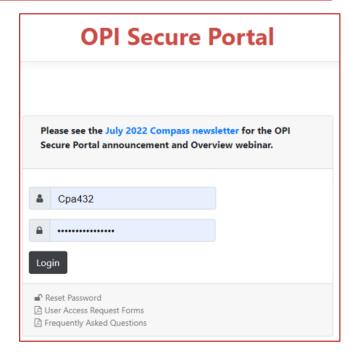
ext.

First Name
First Name
First Name
First Name
First Name
Phone
Phone
Phone
Phone
Pax
First Name
Fax



E-Grants Contact Info – Security Changes

- The ARs or Clerks names on any grants that were approved prior to this year will always show the names of the individuals that submitted the original grants
- However, despite your names not showing on the Contact Tab, you have all the rights of the previous staff members
- To ensure that your name is listed on any <u>new</u> grants you submit, please have your Clerk go to **OPI Contact** and make that change
- OPI Contact can be found at: https://apps.opi.mt.gov/osp/
- It may take several weeks for the OPI Contact information to get the changes into E-Grants





E-Grants Contact Info – Security Changes

To Modify an Existing E-Grants Account:

Add or change access to an additional Legal Entity, or add additional roles or rights within a given Legal Entity

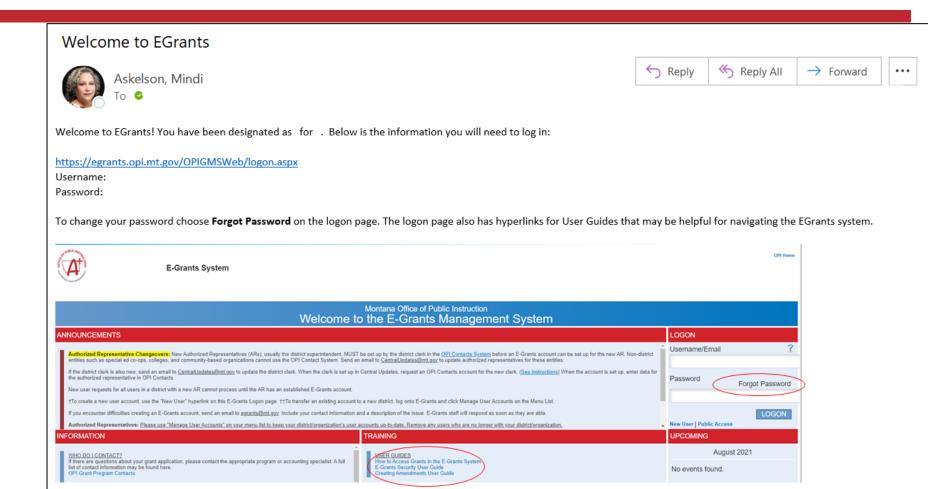
- 1. Select **Manage User Accounts**. This is a new page that will allow users to request additional LEs or roles, as well as allow ARs to view, reassign or remove all users within their LE
- 2. On the **Manage User Accounts** page, the user will see a link with their name. If the user has the Authorized Representative role, the user will see a list of all users within their Legal Entity
- 3. To add an additional business role to an existing assigned LE, follow the instructions on the screen to **Amend Current Access**
- 4. To request access to a different LE, follow the instructions on the screen to Add Additional LE
- 5. Once all new requested access has been added to your screen, select **Request**. This will submit your request to the AR for the requested LE

NOTE: Only the Authorized Representative may remove a user's access from an LE. <u>Non-AR users may not remove themselves.</u>



Welcome to E-Grants

- When you are added into E-Grants as a new AR or Clerk, you receive this email from Mindi
- The bottom text of the email explains why new names aren't appearing on previous grants



Authorized Representatives or Clerks names on any grants that were approved prior to this year will always show the names of the individuals that submitted the original grants. However, despite your names not showing on the Contact Tab, you have all the rights of the previous staff members. To ensure that your name is listed on any new grants you submit, please have your Clerk go to OPI Contacts and make that change. OPI Contacts can be found at: https://apps.opi.mt.gov/osp/. If your Clerk is not able to get into OPI Contacts, please refer to the hyperlinks below. Since that database

does not belong to EGrants, I am not able to assist you with any questions or issues you may have. For assistance for contact the OPI Help Desk at:

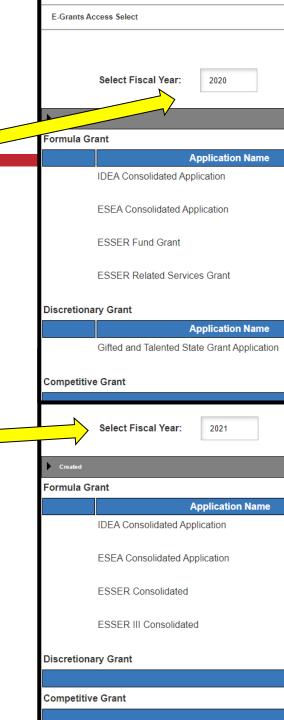
https://opiservicedesk.opi.mt.gov/help/servicedesk/customer/portals.



Which Grant is Which???

- Fiscal Year 2020 (2019-20)
 - ESSER Fund Grant this is ESSER I
 - ESSER Related Services Grant this is also ESSER I

- Fiscal Year 2021 (2020-21)
 - ESSER Consolidated this is ESSER II
 - ESSER III Consolidated this is ESSER III





Finding Account Balances

- Where do I see how much I have?
- Where do I see how much I've spent?







Budget Pages – ESSER 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 budget pages

Click dropdown to access program specific pages:

ESSER Consolidated

ESSER Base
School District Supplemental
Other Educational Institutions
Special Needs
School District Targeted
Supplemental Targeted



Budget Pages – ARP Summer and ARP Afterschool

In Afterschool and Summer Enrichment grants, there is a blue tab at the top named "Budget Pages"

ARP AFTERSCH INFORMATIO		CONTACT INFO	RMATION	ALLOCATIONS	PROGRAM DETAIL	BUDGET PAGES
BUDGET DETAIL	BUDGET	SUMMARY				
Budget Detail	BUDGE	ET BREAKDO	WN (Use	whole dollars	only. Omit Decir	nal Places, e.g., \$



Payments Menu

- From the main 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 REPORT

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 BudgetOriginal 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		



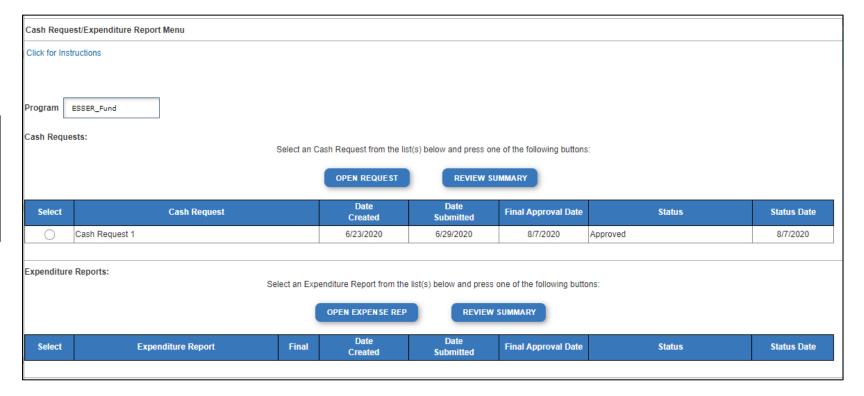
In the Payment Summary menu, click "View Cash Requests/Expenditure Reports" button to see all cash requests for

that grant

Vendor 0000023560 001

VIEW CASH REQUESTS/EXPENDITURE REPORTS

Payment Summary as of 8/5/2022



- View the specifics for individual cash requests
- Select the Cash Request you want to look at...
- Click "Open Request" button to see individual expenses

		OPEN REQUEST
Select	Cash Request	Date Created
<u></u>	Cash Request 1	6/23/2020



Finding Review Feedback

My amendment/cash request was returned. How do I see what needs to be fixed?

- When OPI personnel review and return your amendments and cash requests, we leave helpful feedback and suggestions for changes
- You can find this feedback by going to the Review of your submission



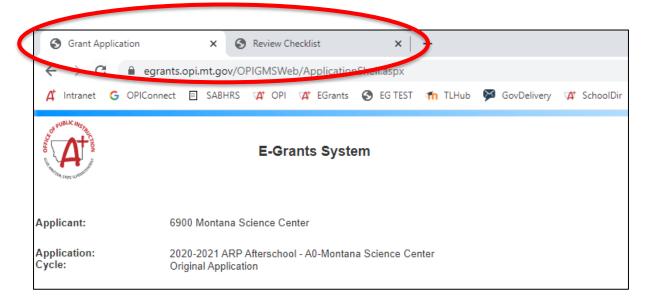
Amendments – Finding the Feedback

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

<u>is turned off</u>

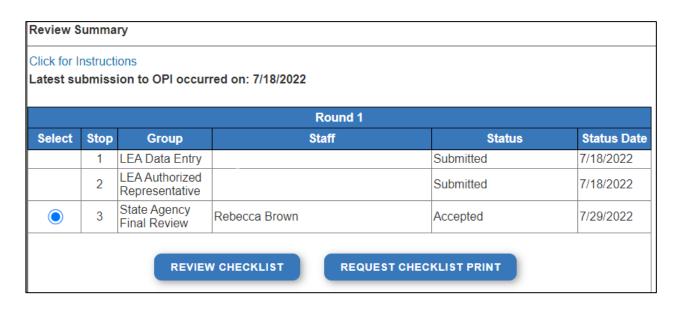


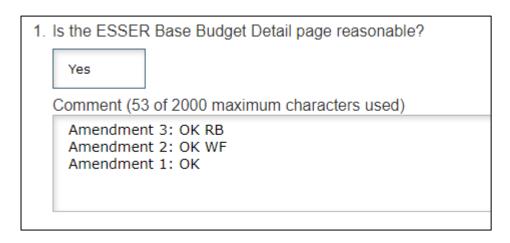


Amendments – Finding the Feedback

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



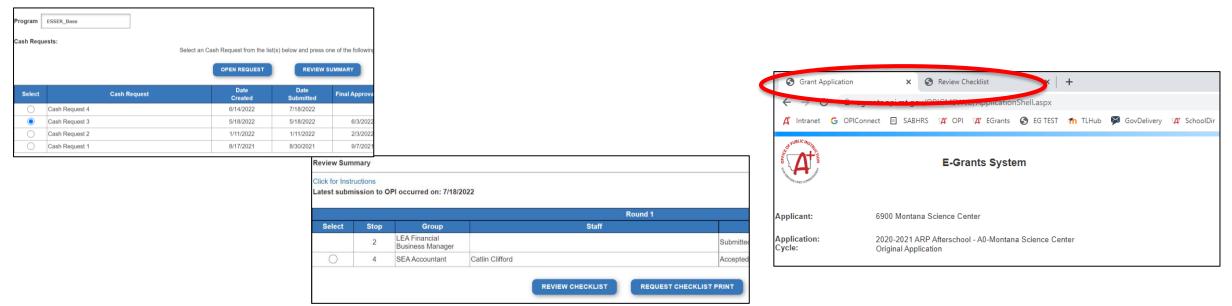




Cash Requests – Finding the Feedback

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

- When in the "Cash Request/Expenditure Report Menu", select the Cash Request you wish to see, then select the "Review Summary" button
- Then select the step you wish to view and select the "Review Checklist" button
- E-Grants will open a second tab in your browser pop-up blocker must be turned off

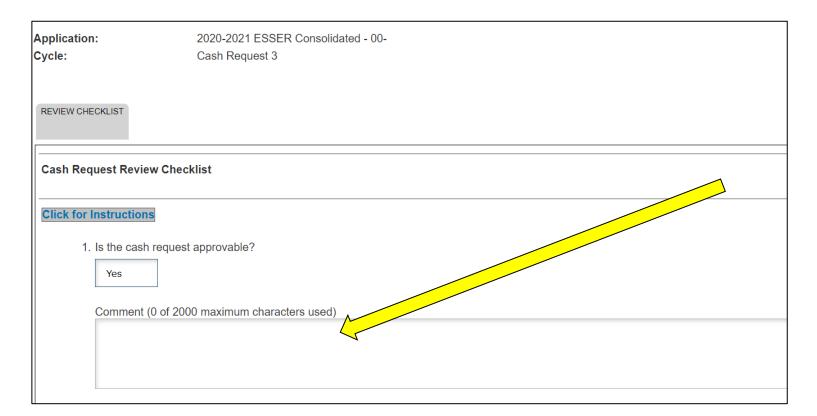




Cash Requests – Finding the Feedback

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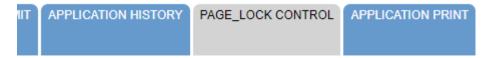


Before doing below please approve through your District's security policy.

- 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:837ea995-9641-4042-ae06-5e7e0e3899f2



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



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



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

Wendi Fawns at <u>wendi.fawns@mt.gov</u> or 406-437-8595 Rebecca Brown at <u>rebecca.brown@mt.gov</u> or 406-444-0783 Mindi Askelson at <u>mindi.askelson@mt.gov</u> or 406-444-0768 Steven Morgan at <u>steve.morgan@mt.gov</u>







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/care program support to schools and families across Montana. Her career in social work, information technology, and education have centered around helping customers defently goals and gain the action of the schools of the schools and particularly solds and gain the schools of the school of the schools of the school of

406-437-8595



Rebecca Brown
ESSER Program Manager

Victoria Hoefler relocated to Montana fro Rebecca Brown is joining us from the Bozeman School District where she worked as the Atlanta, Georgia area, Victoria's previou an ICTE instructor, teaching Metals, Woods, Support, Project Management, B2B Client Support, Software Training and Copywriting In her secondary job, Victoria serves as the 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 Founder and President of a 501(c)3 Charit parakeet. Born and raised in Montana. bringing awareness to mental health need of Military Veterans and better quality of life Rebecca feels nothing can beat a gorgeous Montana summer weekend spent camping for Military Families. She is looking forward to identifying effective ways to improve and floating on the river. broadband internet data in the school 406-444-0783 throughout Montana

406-438-36

Broadband Data Specialist

Thank you!

For questions or additional information please contact:

ESSER Questions:

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 steven.morgan@mt.gov

