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
  o Unlock Page
  o Pop-Up Blockers
  o Error Messages
• Wrap-Up and OPI Resources
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
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
  o 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!
A good Budget example could look like this:

<table>
<thead>
<tr>
<th>600 Supplies</th>
<th>10 Instruction</th>
<th>Supplemental Learning</th>
</tr>
</thead>
</table>

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.
Use the template to rewrite these examples:

**Budget Line Item:**
Chromebooks for students, SMART flat panel interactive boards for classrooms
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.
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.
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
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
✓ 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!
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.

**Cash Request:**

- 600 - supplies purchased for summer program and instruction in support of mitigating math learning loss due to pandemic and summer out of school time.

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>600</td>
<td>$1,900</td>
<td>$0</td>
</tr>
<tr>
<td>1900</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
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
In these 2 grants, there is a blue tab at the top named “Budget Pages”
• E-Grants Access Select page...
• Click “Payments” button next to desired grant to see the Payment Summary
• Payment Summary menu...
• Click “View Cash Requests/Expenditure Reports” button to see all cash requests for that grant
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

<table>
<thead>
<tr>
<th>Select</th>
<th>Cash Request</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cash Request 1</td>
<td>6/23/2020</td>
</tr>
</tbody>
</table>
AMENDMENTS

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

Amendments – Deleting an Amendment

• Only amendments which are in progress, not yet submitted to OPI, can be deleted

• Why would you delete an Amendment?
  o Created by accident
  o No longer want/need to make those changes

• How do you Delete it?
  o Select Amendment to be deleted in dropdown
  o In the E-Grants Access Select page, select the blue “Delete Application” button
  o This button will be grayed out if the Amendment has already been submitted
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
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
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
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!
• 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
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 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
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.
Thank you!

For questions or additional information please contact:

ESSER Program Questions
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