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
• E-Grants can be accessed on the OPI Website by navigating to
  o Leadership >
  o Finance & Grants >
  o E-Grants
• The direct link is here: https://egrants opi mt gov/opigmsweb/logon aspx
On the E-Grants Login page, there is helpful information in case you ever need it.
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.

* Denotes required field

**Authorized Representative:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Summer Phone</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td></td>
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<tr>
<td>Fax</td>
<td></td>
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<tr>
<td>Email</td>
<td></td>
</tr>
</tbody>
</table>

**District Clerk/Business Manager:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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</thead>
<tbody>
<tr>
<td>Last Name</td>
<td></td>
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<tr>
<td>Phone</td>
<td></td>
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<td>Summer Phone</td>
<td></td>
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<td>Fax</td>
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<td>Email</td>
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</tbody>
</table>
• 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 new 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.
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. Non-AR users may not remove themselves.
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.
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
In Afterschool and Summer Enrichment grants, there is a blue tab at the top named “Budget Pages”
Payments Menu

- From the main E-Grants Access Select page...
- Click “Payments” button next to desired grant to see the Payment Summary
In the Payment Summary menu, click “View Cash Requests/Expenditure Reports” button to see all cash requests for that grant.
• View the specifics for individual cash requests
• Select the Cash Request you want to look at...
• Click “Open Request” button to see individual expenses

<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>
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
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.
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*.
How do you see the Feedback on your Cash Request 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.

• 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 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
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