



**Montana**

**Office of Public Instruction**

**ESSER Guidance Sessions – November**

**New Superintendent and Clerk Tips/Guidance**

*Prepare, Prevent, and Respond*

November 15, 2022

# PRESENTERS

**Wendi Fawns, ESSER/EANS Director**  
**[wendi.fawns@mt.gov](mailto:wendi.fawns@mt.gov)** or 406-437-8595

**Rebecca Brown, ESSER Program Manager**  
**[rebecca.brown@mt.gov](mailto:rebecca.brown@mt.gov)** or 406-444-0783



# ESSER Team Contact Info



- Wendi Fawns, ESSER/EANS Director
  - [wendi.fawns@mt.gov](mailto:wendi.fawns@mt.gov) or 406-437-8595
  - Any and all questions about ESSER Grants, Large Purchase/Project Preapproval process



- Rebecca Brown, ESSER Program Manager
  - [rebecca.brown@mt.gov](mailto:rebecca.brown@mt.gov) or 406-444-0783
  - Any and all questions about ESSER Grants



- Steven Morgan, ESSER Grant Accountant
  - [steven.morgan@mt.gov](mailto:steven.morgan@mt.gov) or 406-594-9728
  - Accounting questions including Cash Requests, Final Expenditure Report (FER)



- Mindi Askelson, E-Grants Designer
  - [mindi.askelson@mt.gov](mailto:mindi.askelson@mt.gov) or 406-444-0768
  - Technical support in E-Grants – **not** specific questions about ESSER



# Goals For This Session

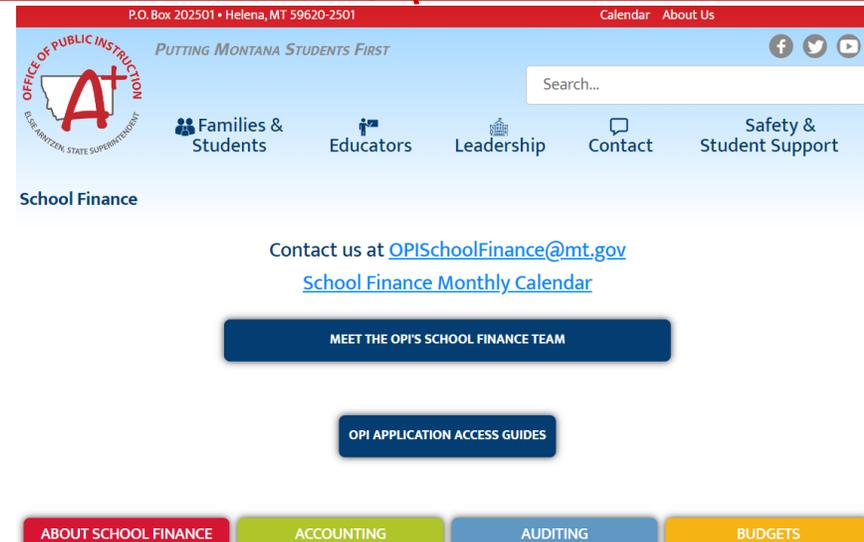
- School Finance Information
- ESSER Overview
- Grant Compliance (Plans, Data Collection)
- E-Grants Overview
- Large Purchase/Project Preapproval
- Grant Tracking
- OPI Monthly Allocation/Status Reports
- Wrap-Up and OPI Resources
- Q&A





# School Finance info for Supers/Clerks

- QuickStart Guides for NEW Clerks and Superintendents
  - The OPI has compiled information to assist new clerks, district superintendents and county superintendents in their new roles. Please see the documents located on the School Finance webpage.
  - <https://opi.mt.gov/Portals/182/Page%20Files/School%20Finance/QUICKSTART%20GUIDES/OPI%20Access%20QuickGuide.pdf?ver=2022-09-16-111917-737>



- PERSONNEL CHANGES

- Changes to board chair, clerk/business manager, superintendent, or principal must be changed in [OPI Contacts](#). Instructions for how to make these changes are found [here](#). If you have question about how to complete the updates, please contact: [CentralUpdates@mt.gov](mailto:CentralUpdates@mt.gov).



# ESSER Overview

Welcome to the ESSER Grants!

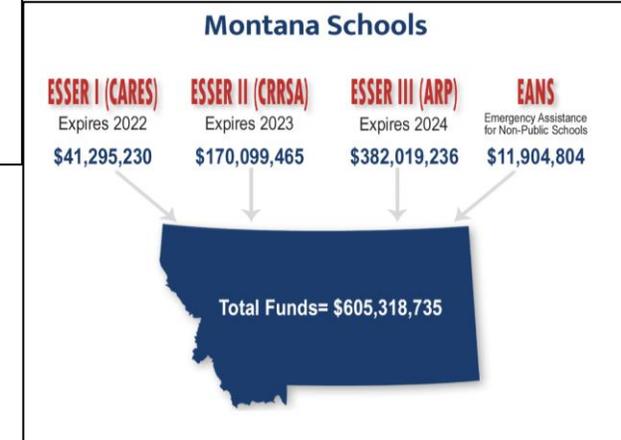
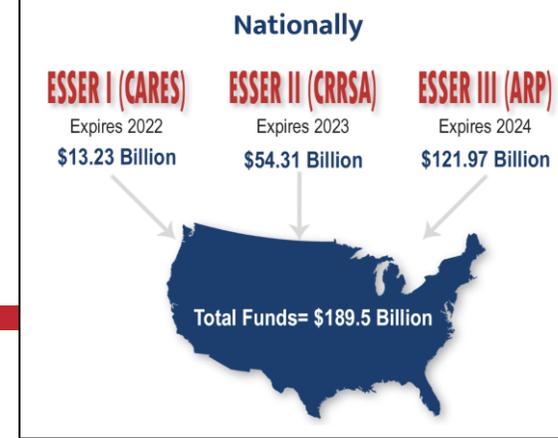
- **ESSER = Elementary & Secondary School Emergency Relief**

- ESSER I (CARES) – Expires 2022
- ESSER II (CRRSA) – Expires 2023
- ESSER III (ARP) – Expires 2024

- **ESSER Purpose:** Preparing for, Preventing, & Responding to the effects of the COVID-19 pandemic.

- Previous OPI Guidance/Training Sessions:

- National and State Overview – August 9, 2022 <https://youtu.be/KgleP3A3uIo>
- Allowable Use of Funds – September 20, 2022 <https://youtu.be/vYlup7cscbo>





# Grant Compliance – School Plans

- **Safe Return Plans**

- Similar to earthquake, intruder/lockdown plans
- District generates as PDF and maintains on School Website – send URL to OPI

- **ARP ESSER or ESSER ARP Plan (use of funds)**

- High level anticipated use of funds – Changeable through amendment process
- District updates via Qualtrics portal – *Email Wendi for your unique link/login*

- **Both Plans**

- Must be updated twice a year *with community engagement*
  - OPI checks in June/December, so update in May/November to maintain compliance
- Must be posted on School Website – easily accessibly by public
- Posted on OPI Website here: <https://opi.mt.gov/COVID-19-Information/ESSER#10664912075-esser-state-and-district-plan>

- OPI offered a more in-depth training in September, which you can view here: <https://youtu.be/50lcp-XzvQ>

## ESSER Resources

### ▼ ESSER State and District Plan

On August 5, 2021, the U.S. Department of Education [approved](#) the [ARP](#) approved roadmap for helping our great Montana schools and communities improve instruction for our Montana students. The Montana State Plan re schools, and enhances accountability.

### Montana State and District Plans

- [Montana State Plan](#) (pdf)
- [Montana State Homeless Children and Youth Plan](#) (pdf)
- [District Plans](#) (Spreadsheet)
- [MT OPI School District ARP ESSER Plan Template](#) (pdf)

OPI is offering a  
Guidance Session  
on **Meaningful  
Stakeholder  
Consultation &  
Communication** on  
Wednesday,  
November 16th



# Grant Compliance – Data Collection

- Federal **annual report**
  - Funding and outcomes attached
  - Participation numbers and spending categories
- Ongoing ESSER **stakeholder engagement**
  - The active process of involving those who may be affected by ESSER decisions (students, parents, teachers, community)
  - Promote and share out to build support
- Preparing:
  - Track expenditures in excel/sheets – braid not blend
  - Clearly identify student gains/outcomes
  - Review expenditures at least quarterly
- OPI offered a more in-depth training in September, which you can view here:  
<https://youtu.be/mjHQBH6tSrs>



OPI is offering a  
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# E-GRANTS

## A Brief Overview of E-Grants

OPI has offered several in-depth trainings, which you can view here:

E-Grants Error Messages – October 17, 2022 <https://youtu.be/KcaSy23PZsM>

E-Grants Prep & Processing – October 18, 2022 <https://youtu.be/Y8w93S1rO74>

Cash Requests – September 22, 2022 <https://youtu.be/nHb7p7xC4Ds>

Amendments – September 21, 2022 <https://youtu.be/ShOlw9eLo2Q>

Navigating E-Grants – August 9, 2022 <https://youtu.be/Fjpm7h49oek>



# E-Grants: TIP – Turn Off Pop-Up Blockers

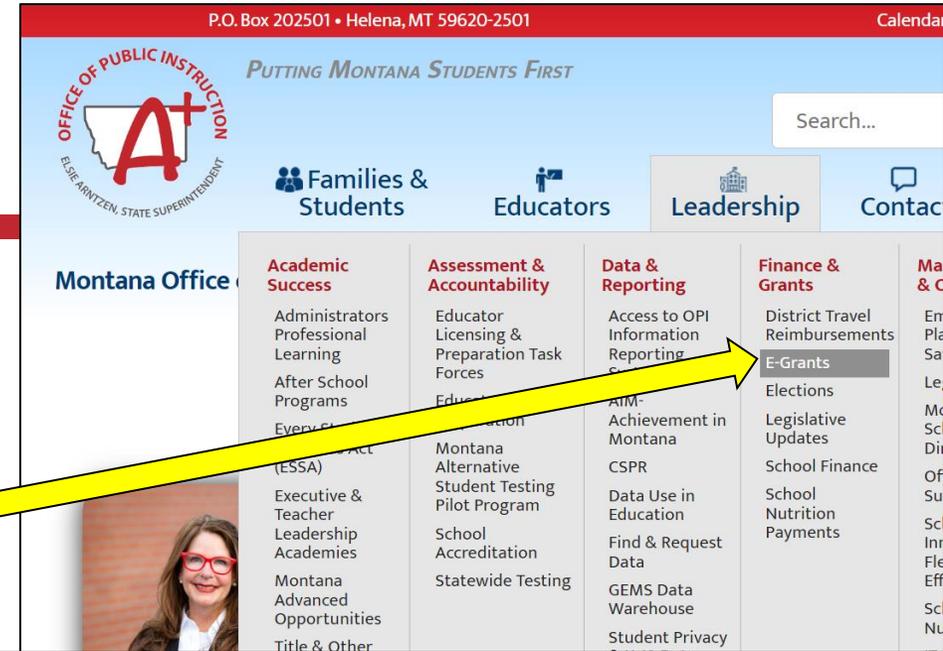
***Before doing below please approve through your District's security policy.***

- 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>

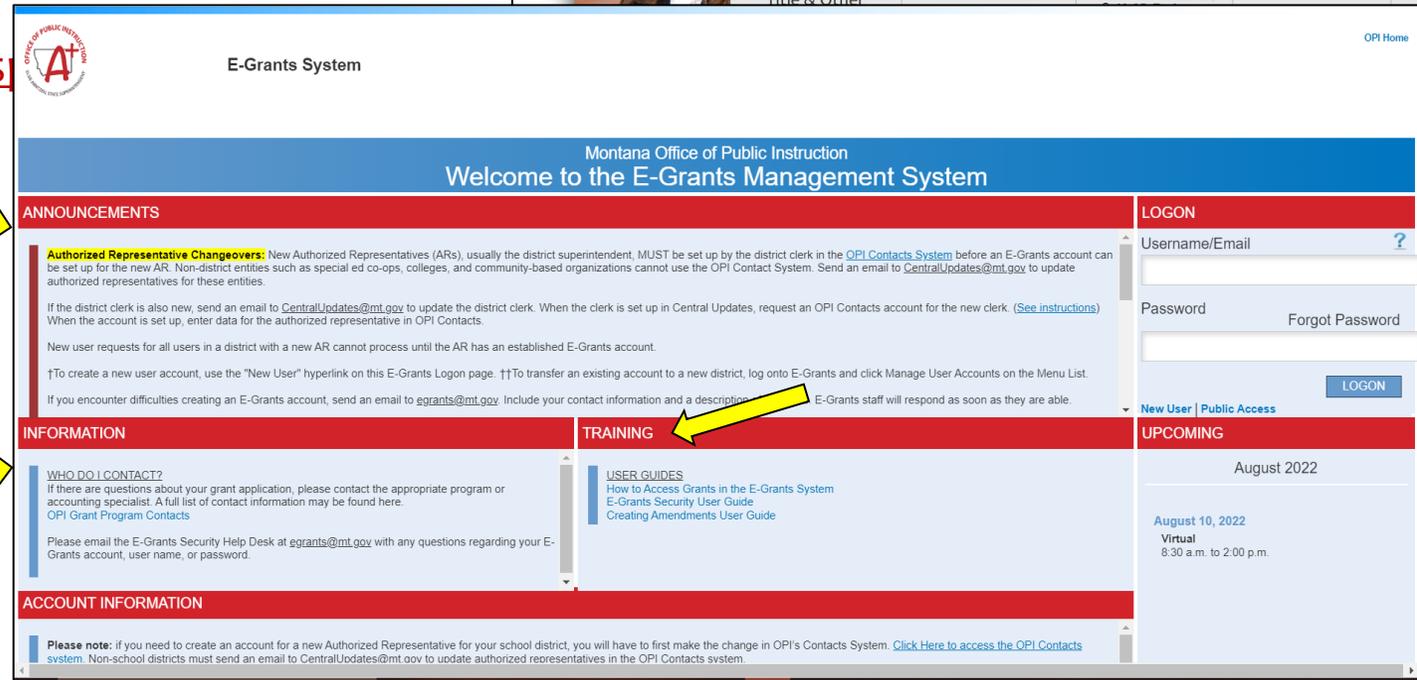


# E-Grants: Logging In

- E-Grants can be accessed on the OPI Website by navigating to:
  - Leadership > Finance & Grants > E-Grants
- The direct link is here:  
<https://egrants.opi.mt.gov/opigmsweb/logon.asp>



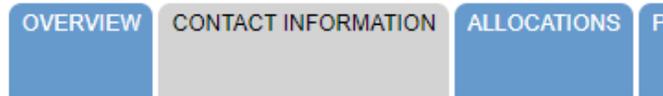
On the E-Grants Login page, there is helpful information in case you ever need it





# 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**

\* Denotes required field

## Authorized Representative:

Last Name	<input type="text"/>	First Name	<input type="text"/>
Phone	<input type="text"/> <input type="text"/> <input type="text"/> ext. <input type="text"/>	Fax	<input type="text"/> <input type="text"/> <input type="text"/>
Summer Phone	* <input type="text"/> <input type="text"/> <input type="text"/> ext. <input type="text"/>	Email	<input type="text"/>

## District Clerk/Business Manager:

Last Name	<input type="text"/>	First Name	<input type="text"/>
Phone	<input type="text"/> <input type="text"/> <input type="text"/> ext. <input type="text"/>	Fax	<input type="text"/> <input type="text"/> <input type="text"/>
Summer Phone	* <input type="text"/> <input type="text"/> <input type="text"/> ext. <input type="text"/>	Email	<input type="text"/>



# E-Grants: Contact Info – Security Changes

- Despite your name(s) 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*

OPI Secure Portal

Please see the July 2022 Compass newsletter for the OPI Secure Portal announcement and Overview webinar.

Cpa432

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Login

Reset Password  
User Access Request Forms  
Frequently Asked Questions

## 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*

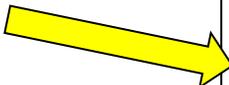
1. Select **Manage User Accounts**.
2. On the **Manage User Accounts** page, the user will see a link with their name.
  1. If the user has the Authorized Representative role, the user will see a list of all users within their Legal Entity
3. **Amend Current Access** to add an additional business role to an existing assigned LE.
4. **Add Additional LE** to request access to a different LE.
5. Once all new requested access has been added to your screen, select **Request** to submit your request to the LE's AR.

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



# 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



Welcome to EGrants



Askelson, Mindi  
To

Reply Reply All Forward

Welcome to EGrants! You have been designated as for . Below is the information you will need to log in:

<https://egrants.opi.mt.gov/OPIGMSWeb/logon.aspx>

Username:

Password:

To change your password choose **Forgot Password** on the logon page. The logon page also has hyperlinks for User Guides that may be helpful for navigating the EGrants system.

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>.



# E-Grants: Finding Grants

- 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**

E-Grants Access Select

Fiscal Year: 2020

Created

Formula Grant

Application Name
IDEA Consolidated Application
ESEA Consolidated Application
ESSER Fund Grant
ESSER Related Services Grant

Discretionary Grant

E-Grants Access Select

Year: 2021

Created

Formula Grant

Application Name
IDEA Consolidated Application
ESEA Consolidated Application
ESSER Consolidated
ESSER III Consolidated

Discretionary Grant

# E-Grants: View Previous Amendments

- In the “E-Grants Access Select” page, you can see all grants within the fiscal year
- Click on the box next to desired grant
  - This is a drop-down menu which shows all amendments
- Select desired amendment
- Select “Open” button to view amendment

Select Fiscal Year:

Created

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"/>

Discretionary Grant

Amendment 3

**Amendment 3**

Amendment 2

Amendment 1

Original Application

# E-Grants: Viewing/Printing an Application

- To print a single page:
  - Click “Printer Friendly” in top-right corner
  - Press Ctrl+P on your keyboard to print the page
- To print the entire application:
  - Click “Application Print” tab
  - Select which pages you want to print
  - Click “Request Print”
  - You will receive an email documenting your request
  - Print will be ready at the top of the hour

am specific pages:

ESSER Consolidated

Printer-Friendly

[Click to Return to Organization Page](#)  
[Click to Return to eGrants Access/Select Page](#)

[Click to Return to Menu List / Sign Out](#)

GE\_LOCK CONTROL

APPLICATION PRINT

ESSER Consolidated

ESSER Base

School District Supplemental

Other Educational Institutions

Special Needs

School District Targeted

Supplemental Targeted

REQUEST PRINT

DoNotReply@mt.gov  
E-Grants Print All Request  
Your request for a print-out of

Tue 10/4



# E-Grants: Grand Award Notification (GAN)

- The GAN for each grant can be found on the E-Grants Access Select page

Select Fiscal Year:

2021

Created

## Formula Grant

	Application Name	Revision	Status	Date	
	IDEA Consolidated Application	Original Application	Final Approved	8/31/2020	<a href="#">OPEN</a>
	ESEA Consolidated Application	Original Application	Final Approved <a href="#">View GAN</a>	9/17/2020	<a href="#">OPEN</a>
	ESSER Consolidated	Amendment 5	Returned for Changes	10/13/2022	<a href="#">OPEN</a>
	ESSER III Consolidated	Amendment 1	Final Approved <a href="#">View GAN</a>	10/18/2022	<a href="#">OPEN</a>

## Discretionary Grant

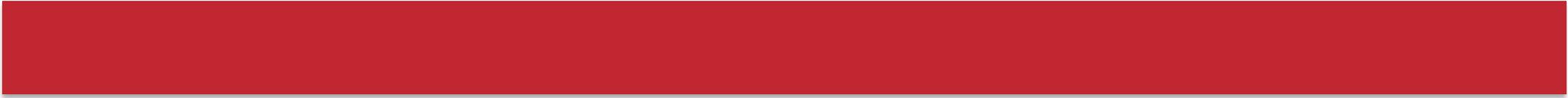
There currently aren't any Discretionary Grant applications created



# Preapproval for over \$5k purchases

- Individual **item** or **project** over \$5k will need **School Board** and **OPI approval**.
- Examples:
  - A copier which costs \$12,000
  - A “Network Connectivity Upgrade” project made up of several parts/pieces which add up to \$7,000
- Preapproval Process:
  - Create a Project Scope
  - Submit the Scope through the [Preapproval Form](#)
  - After submitting, you will receive an email confirmation with a copy of your responses
  - OPI will review your preapproval request, and notify you of approval status or any further questions.
- Previous OPI Guidance/Training Session:
  - Capital Expenditure / Large Purchase Process – September 23, 2022 [https://youtu.be/AAO9k\\_bbpWk](https://youtu.be/AAO9k_bbpWk)

# GRANT TRACKING



## A Brief Overview of Tracking Grants for your Internal Bookkeeping

OPI offered a more in-depth training in October, which you can view  
here: <https://youtu.be/Y8w93S1rO74>



# OPI Monthly Allocation/Status Update Report

- On the OPI ESSER Website at:  
<https://opi.mt.gov/COVID-19-Information/ESSER>
- Under ESSER Resources > Allocation and Status Updates
  - District/Trustee updates produced monthly
  - Show high-level view of school status:
    - Overall Allocation
    - Allocation within each budget program
    - Expenditures to date
    - Remaining balance

## ESSER Resources

▶ ESSER State and District Plan

▶ Resources, FAQ, and Guidances

▼ Allocation and Status Updates

### Allocation Updates

- [ESSER I, II and III District Allocations](#) (pdf)
- [Enrollment Increase \(HB 630\) BASE Aid Payment Guidance](#) (pdf)

### Status Updates

- [District October 2022 Status Report](#) (pdf)
- [Trustee October 2022 Status Report](#) (pdf)
- [District September 2022 Status Report](#) (pdf)
- [Trustee September 2022 Status Report](#) (pdf)
- [District August 2022 Status Report](#) (pdf)
- [Trustee August 2022 Status Report](#) (pdf)
- [June 2022 Status Report](#) (pdf)
- [May 2022 Status Report](#) (pdf)
- [March 2022 Status Report](#) (pdf)
- [February 2022 Status Report](#) (pdf)
- [December 2021 Status Report](#) (pdf)





# Grant Tracking Tips & Tricks

1. Print GAN from E-Grants and staple to folder (scan for audit)
2. Print Original Budget from E-Grants
3. Set up tracking in [Excel grant workbook](#)
4. All amendments, cash requests, and cash received enter in the workbook
5. Each cash request should have its own document detailing the request
6. Use the “Notes” sheet in the workbook to remind where you left off and things that still need to be done.



# Grant Tracking in the Workbook

- This example workbook is only for ESSER II.
  - You may want to create a separate workbook for each grant, instead of putting all grants into one workbook.
- One “sheet” for each grant budget page, plus one for the overall summary

The screenshot shows an Excel workbook with the following sheets: Summary, ESSER II Base, ESSER II Supp, and ESSER II Spec Needs. The 'Summary' sheet is active and contains the following data:

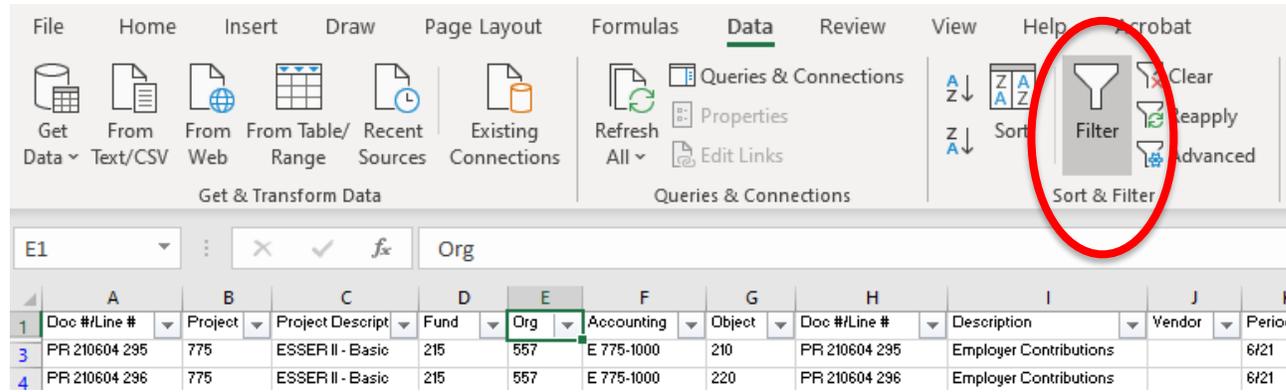
ESSER Grant Summary	Project #	Original Grant	Date	Billed	Date	Billed	Date	Billed	Date	Billed	Date	Billed	Total Billed	Total Remaining
ESSER II Base	775	\$1,040,584	12/9/2021	\$272,257	12/31/2021	\$166,969	5/19/2022	\$173,568	6/16/2022	\$268,371			\$881,165	\$159,419
ESSER II Supplemental	776	\$43,532	9/14/2022	\$10,078									\$10,078	\$33,454
ESSER II Special Needs	777	\$15,347	9/14/2022	\$9,041									\$9,041	\$6,306
<b>TOTALS</b>		<b>\$1,099,463</b>		<b>\$291,376</b>		<b>\$166,969</b>		<b>\$173,568</b>		<b>\$268,371</b>			<b>\$900,284</b>	<b>\$199,179</b>

The 'ESSER II Base' sheet shows a detailed budget breakdown with columns for Salaries, Benefits, purchased services, property, other purchased, supplies, property & equip, and other objects. It includes a 'Cash Request' section with dates and amounts, and a 'GRANT PERIOD' section with dates and descriptions.

Page 1

# Excel Tips & Tricks

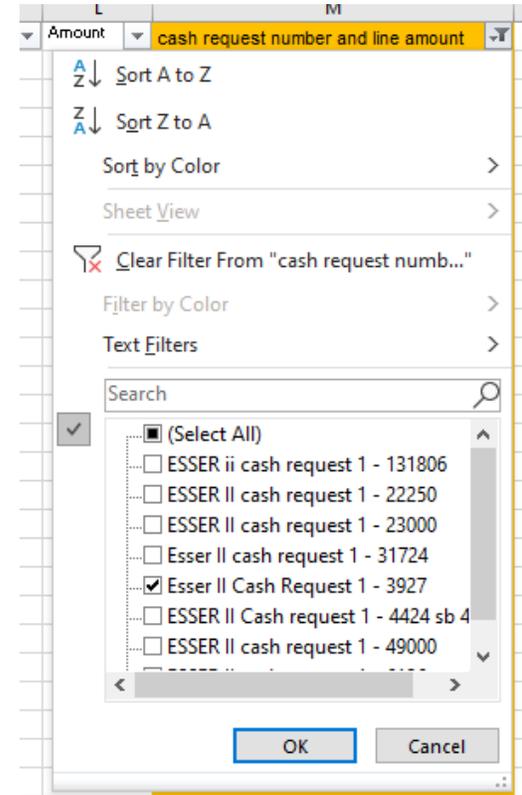
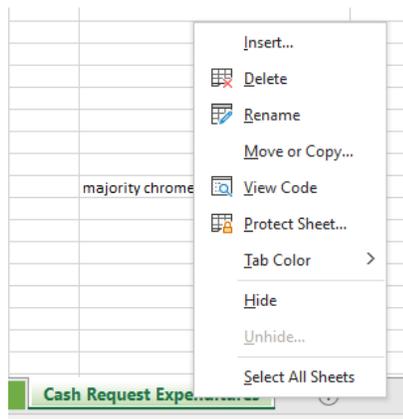
## 1. Filter/Sort



## 2. Add a new sheet



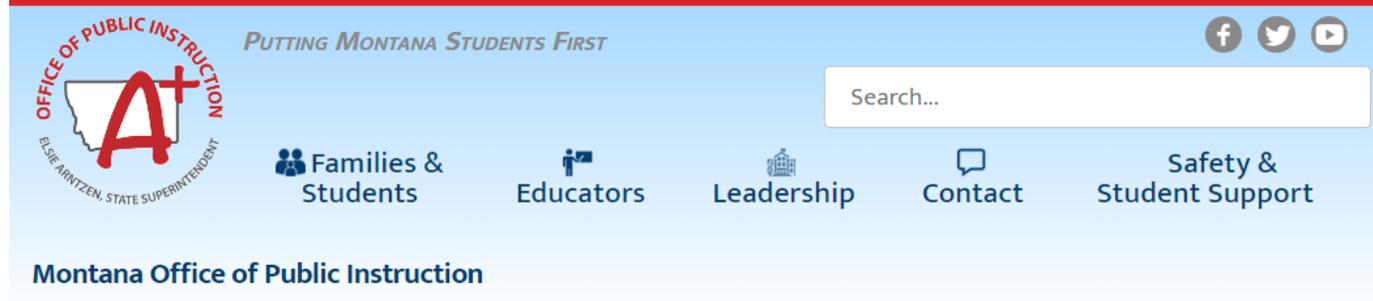
## 3. Edit existing sheets





# Excel/TFS Upload

- Use an apostrophe ' before number for both Excel and upload in TFS
  - Often in Excel you will need to have a number with a leading zero.
  - Using an apostrophe ' before the number holds the zero.
  - This is important for TFS upload in MAEFAIRS and E-Grants.
  - Example: 0731 reverts to 731 in the excel sheet, use '0731 to hold the zero.

The header of the OPI website is light blue. On the left is the OPI logo with the text 'OFFICE OF PUBLIC INSTRUCTION' and 'ELSIE ARNTZEN, STATE SUPERINTENDENT'. To the right of the logo is the slogan 'PUTTING MONTANA STUDENTS FIRST'. Further right is a search bar with the placeholder text 'Search...'. Below the search bar are five navigation buttons: 'Families & Students', 'Educators', 'Leadership', 'Contact', and 'Safety & Student Support'. In the top right corner of the header are social media icons for Facebook, Twitter, and YouTube.

## 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](#)

[WATCH THE 2022 FALL SCHOOL LAW CONFERENCE](#)

[2021-2022 SUMMATIVE ASSESSMENT SCORES](#)

[2023 TEACHER OF THE YEAR](#)

[OPI ORGANIZATIONAL CHART](#)

[SEE OPI PRESS RELEASES](#)

[ESSER](#)

[EANS](#)

[BROADBAND](#)

# Q & A

**For questions or additional information please contact:**

**Wendi Fawns, ESSER/EANS Director**  
**[wendi.fawns@mt.gov](mailto:wendi.fawns@mt.gov) or 406-437-8595**

**Rebecca Brown, ESSER Program Manager**  
**[rebecca.brown@mt.gov](mailto:rebecca.brown@mt.gov) or 406-444-0783**