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Introduction

The E-Grants User Logon Page gives access to E-Grants for an LEA through users entering their email address and assigned password.

Before getting started, please be sure that any Internet Explorer browsers have **Compatibility View** and **Pop-Up Blockers turned off**.

The E-Grants User Login Page displays 3 different links available to users.

**Forgot Password:** The Forgot Password link allows a user to request a password if they no longer can logon because of a forgotten password. When requested, the user will receive an email with a one-time temporary password. Upon entering this password the user will be requested to change their password following these guidelines: Minimum length 8 characters, minimum 1 uppercase letter, minimum 1 lowercase letter, and minimum 1 numeric character.

**New User:** The new user link allows a user to request credentials for accessing E-Grants or to establish a new Legal Entity in E-Grants. Requests for new users will first be submitted to the Authorized Representative for the district the user is requesting to be associated with. The Authorized Representative may accept or deny the user request. If accepted the request will be submitted to the OPI Security Administrator who has the final authority to grant or deny access. Requests for new vendors/organizations will be sent directly to the OPI Security Administrator for approval.

**Public Access:** Public access allows a user to view approved applications without entering a Username/Email and password.
Quick Tips & FAQs

- I have a question about E-Grants security. Who do I contact?
  
  Before contacting OPI directly, please review this entire document. We have tried to list clear step-by-step instructions so that users do not need to rely on our specialists’ availability to receive answers to their questions.

  In the event that your question is not answered within this document, please submit your question, via email, to our Security Helpdesk at egrants@mt.gov. Our security coordinator will respond to you within 24 hours.

- I need an E-Grants account. What now?

  Please skip ahead to the New User Set-Up section.

- Where is the E-Grants Security Form?

  All E-Grants security will now be done through the E-Grants system itself. No more paper forms- hooray!

- Why is my password not working?

  All E-Grants passwords expire after 90 days. If you receive an error message stating that your password has expired, please follow the Forgot Password instructions on page 5.

- I have an E-Grants account but I’m switching districts. How do I change my security access to the new district?

  Please see the section Modify Existing Users.

- I requested a new account for my superintendent three weeks ago. How do I know if their account was created?

  If you have submitted a New User Request on behalf of a coworker or supervisor, you will not receive a notification email once that process has been completed. Only the email address listed on the New User account will receive a notification. Please have the requested new user themselves check their email for the E-Grants notification.

- My organization has two Authorized Representatives listed, but one of them isn’t with our district anymore. How do we remove them?

  Please have the current Authorized Representative remove any outdated Authorized Representatives using the instructions listed in the section Modify Existing User Accounts.
I am trying to create a New User Request and/or add another district to my account, but the contact information for my Authorized Representative doesn’t appear when I select my LE. What now?

In this instance, you will see the error message circled below. The AR Contact Information in this section is extracted from the OPI Contacts system. If no contact information is listed, this means that OPI Contacts must be updated prior to the submission of any E-Grants account requests. The OPI Contacts system can only be accessed by district clerks.

- **For New Superintendents:** If an Authorized Representative has recently been hired, the district clerk must use the OPI Contacts system to update the Authorized Representative's contact information. (If a district clerk is not available, please email CentralUpdates@mt.gov. Once OPI Contacts is updated, the Authorized Representative may request access to the E-Grants system, and once provided with an account, may approve requests for all other staff.

- **For LEAs that are not school districts:** Update Authorized Representative contact information by emailing CentralUpdates@mt.gov.

- **No Available Superintendent:** If a district superintendent or other Authorized Representative has recently left the district, please complete an Authorized Representative Exception form and submit to OPI to grant temporary Authorized Representative rights to another person. This person may then request access to E-Grants.

- **For All Other Roles:** Please ensure that there is an Authorized Representative on file prior to attempting a request for E-Grants rights. The system will not allow this request to be submitted.
Forgot Password

**Step 1.** If a user has either forgotten their password – OR – has an expired password, enter the user’s email address and click the **Forgot Password** link.

The system will display a message informing the user that an email has been sent with a **one-time temporary password**.

When the user enters this password, he or she will be prompted to change the password.

Note the password requirements when setting a new password.

**Helpful Hint!**

Once the user has entered their email address and temporary password, this box (at left) will appear.

The user must enter the temporary password in the **Old Password** box in order to create a new password. Do not attempt to input a previous password once the **Forgot Password** process has been initiated.

**Do not click Forgot Password multiple times.**
New User Set-Up

NOTE: The New User Set-Up function only applies to users who have never been assigned an E-Grants account. For existing users, please see Modify Existing Accounts.

Step 1. Select the New User link from the E-Grants Logon Page.

Step 2. Enter the name of the Legal Entity (LE).

The Legal Entity may consist of a Local Education Agency (LEA), a not-for-profit organization, an institution of higher education, or other vendor receiving grant funding from the Montana Office of Public Instruction. Click Search.
Step 3. Select the Legal Entity (LE) from the list, and click **LE Detail**.

This will add the Legal Entity to your account request. The LE name and number will appear in the lower half of the pop-up window.
Step 4. To add additional LE(s), select another LE from the list and click **LE Detail**.

Help! I accidentally selected the wrong LE! What do I do now?

Not a problem- simply click the **Remove Selected LE** button to clear your settings.
Step 5. To add an additional LE that requires a new search, type the new LE name. Any previously added Legal Entities will remain in your list. The Authorized Representative listed for each LE added will appear in the bottom of the screen.

Step 6. Once all LEs have been selected, click **Request New Account**.

Step 7. The **New User Request** form appears.
Step 7. Enter the appropriate **contact information** into the form and click **Submit**.

You may only select one **Role** type on single New User Request. If you required different roles (for example, Business Manager at one district but Authorized Representative at another district), please submit two requests.

Each request will be delivered to the Authorized Representative listed for each LE selected. For users requesting access to both Elementary and High School districts, the Authorized Representative will receive two requests.

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Step 8. Your request has been **submitted**!

If you have requested the **Authorized Representative** role, your request will submit directly to OPI security staff.

If you have requested **any other role**, the Authorized Representative for that Legal Entity must approve your request and submit it to OPI. Please contact your Authorized Representative and have them approve the request, as per the instructions on page.
Modify an Existing Account

If the user has an existing E-Grants account, please use this process to add or change access to an additional Legal Entity, or add additional roles or rights within a given Legal Entity.

Step 1. Select Manage User Accounts. This is a new page that will allow users to request additional LEs or roles, as well as allow Authorized Representatives to view, reassign or remove all users within their LE.

Step 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.
**Step 3.** To add an additional business role to an existing assigned LE, follow the instructions on the screen to *Amend Current Access*. To request access to a different LE, follow the instructions on the screen to *Add Additional LE*.

Once all new requested access has been added to your screen, select *Request*. This will submit your request to the Authorized Representative 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.*

Conversely, only a user may request new access for his or her account. The Authorized Representative *may not* request access for their staff.
Authorized Representative Review of User Requests

When a user successfully submits a request for access to E-Grants, the Authorized Representative for the district/Legal Entity will receive an email informing them of the request. To review user requests, the Authorized Representative will do the following:

**Step 1.** Log into E-Grants.

**Step 2.** Select **Security Request To Do List** from the Main Menu, under the **E-Grants User Administration** category.

**Step 3.** If the Authorized Representative is associated with multiple organizations, they will need to select the correct organization (LE) from the dropdown list to display the appropriate user request.

**Step 4.** Once the user request is displayed in the table, double-click on the request to select.
Step 5. The selected User Request will be displayed. Under the New User Request heading, the role requested by the New User is displayed (see highlighted text).

Business roles available to local-level staff are displayed on the left-hand side.

By clicking Assign next to one (or more) of these roles, that user is now associated with that Legal Entity and that Business Role. These changes are applied when the reviewer clicks Accept.

An Accept action triggers a notification to the OPI Security Administrator that a user request is ready to be reviewed. Final acceptance by the OPI Security Administrator is needed before a new user is established in the system.

The Reject action triggers a notification to the requester’s email that their request has been reviewed and denied.
New Legal Entity (LE) Set-Up

To create a new Legal Entity with the Montana Office of Public Instruction, please follow these instructions.

**Step 1.** Select the **New User** link from the Logon Page.

**Step 2.** Select the **Add New Legal Entity** button.
Step 3. The **New Vendor Request Form** will display.

- The fields on the left should be completed for the **new vendor** (organization name, address, street address, city, state, zip code, phone number and website).
- The fields on the right should be completed for the **Authorized Representative** of the district (first name, last name, email and role) along with designating the authorized representative role.
- A completed IRS W-9 form must be uploaded using the **Attach W-9** button. In addition, a link to the OPI new Vendor Form is provided by selecting the highlighted 'New Vendor Form'.
- A completed new vendor form is uploaded by selecting the **Attach Vendor Form** button. If an incorrect form is uploaded, simply browse and select the correct form and it will replace the form previously uploaded. When the new vendor request is correctly completed select the **Submit** button.

An **IRS W-9** form and **OPI New Vendor Form** must be completed prior to submitting this New Legal Entity Request. Please contact (406) 444-3095 with any questions.

Once the user has clicked **Submit**, a verification pop-up will appear informing the user that their request has been submitted. **The OPI Security Officer must approve the request.**

If approved, the new organization will be added to E-Grants and the Authorized Representative named in the request will be sent an email informing him/her that her request has been approved and providing them with their password.

At that time other user requests for access to that LE in E-Grants may be submitted.