Office of Superintendent of Public Instruction

iGrants User Training Manual

iGrants User Manual - District

Last updated: April 1, 2013

Contact Us

Email: iGrants@k12.wa.us Phone: 360.725.4956

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Introduction

The Office of Superintendent of Public Instruction (OSPI) uses an Internet-based system — iGrants – to collect data from Washington State school districts for a variety of federal and state grant applications, competitive grants (RFPs), and end-of-year reports.

Training Manual Purpose

In an effort to make iGrants a more user-friendly system, enhancements are ongoing. This training manual serves as an introduction to operate the iGrants system. This manual is structured so that one can work at his/her own pace by following the system navigation steps. Screenshots are provided to illustrate the various iGrants processes.

Audience

All non-OSPI iGrants users can use this training manual to learn how to operate the iGrants system and generate budget reports and data exports.

Gaining Access to iGrants

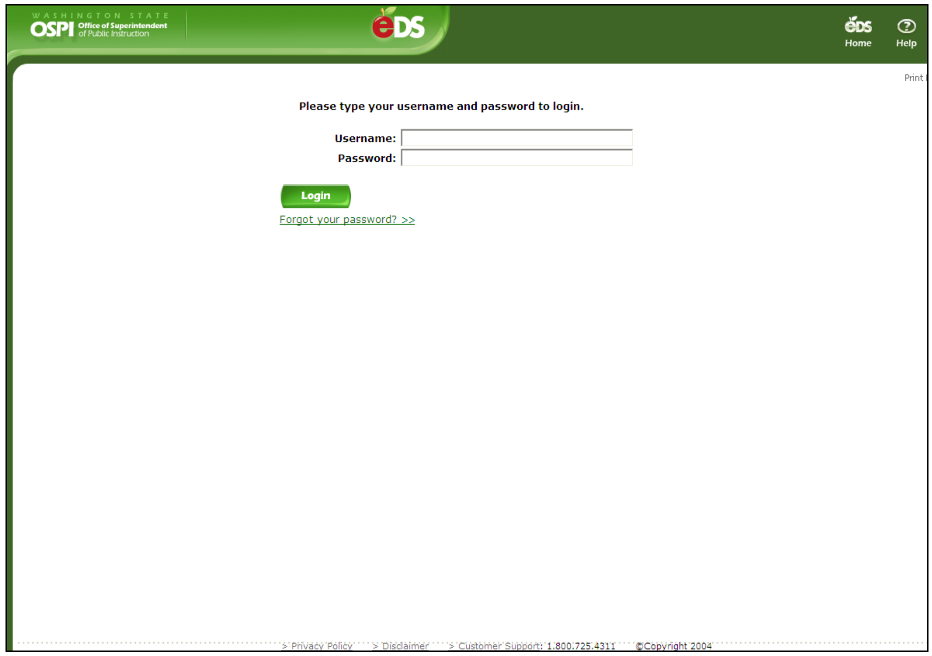
The procedures for gaining access to iGrants are listed below according to organization type.

- **School Districts:** All users must contact their district security manager. A list of district security managers is located on the iGrants home page under the **Obtain User Login Credentials** link.
- **All other organizations** (listed below) must contact OSPI Customer Support by calling **(800) 725-4311, Option #7** or emailing **CustomerSupport@k12.wa.us.**
    - **Educational Service Districts**
    - **Non-Profit Organizations**
    - **Colleges and Universities**
    - **OSPI Program Staff** (After obtaining iGrants permissions from Customer Support, contact iGrants for access to specific form packages.)

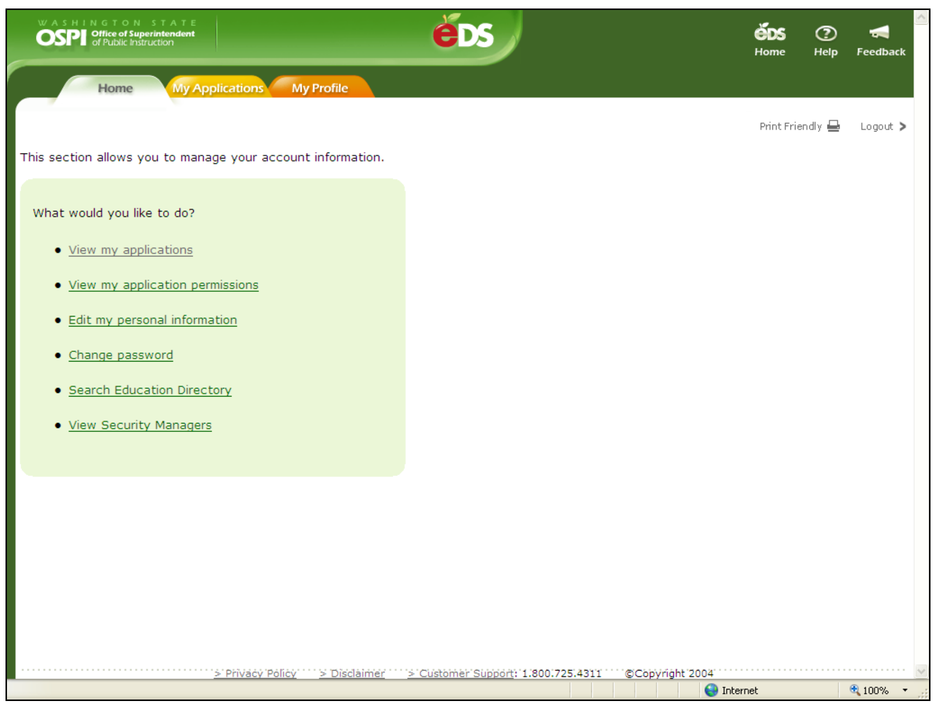
1. Logging Into iGrants (All Users)

1. From the EDS Login screen, type your **Username** and **Password** and click **Login**. The EDS Home page opens.

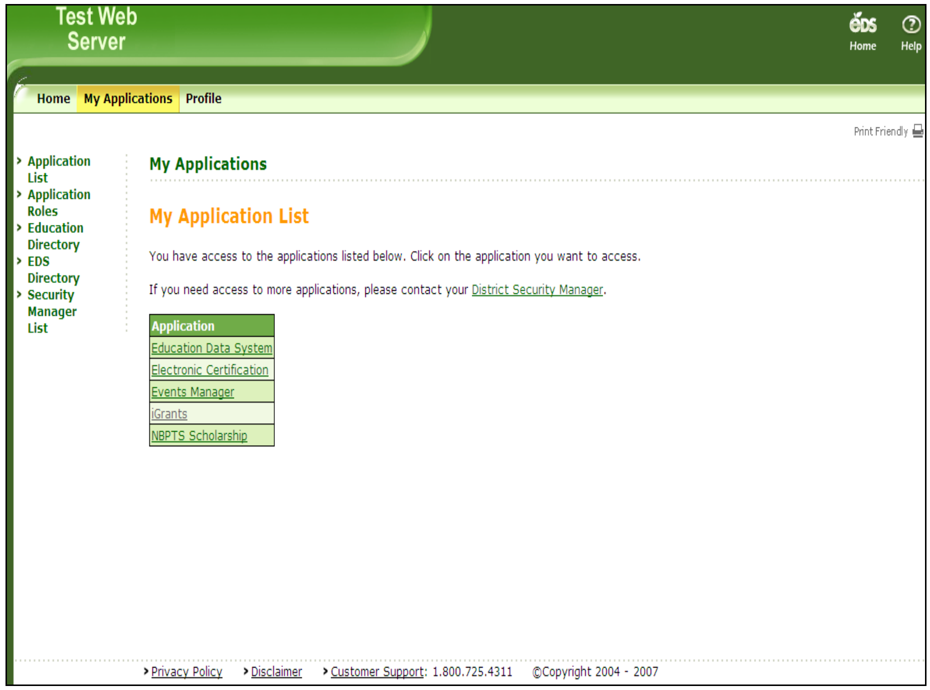
   The URL to use is: https://eds.ospi.k12.wa.us/Login.aspx.



2. From the EDS home screen, click on the **My Applications** tab. The My Application page opens. Clicking on the **View my applications** link will bring up the same list.



3. From the My Applications screen, click on the **iGrants** link.



Note:

- Each user's My Application List will contain different links. If yours is missing the **iGrants link,** contact your district's data security manager (districts only) or OSPIs Customer Support (all other organizations) at 1.800.725.4311, Ext. 7 and ask to be given iGrants access.

4. Clicking iGrants on the My Application page displays the iGrants home page screen. You can click on **Login to iGrants** to go into the iGrants application. (If you have already logged into the EDS system, you are not required to login again, but you must still click the Login link.)

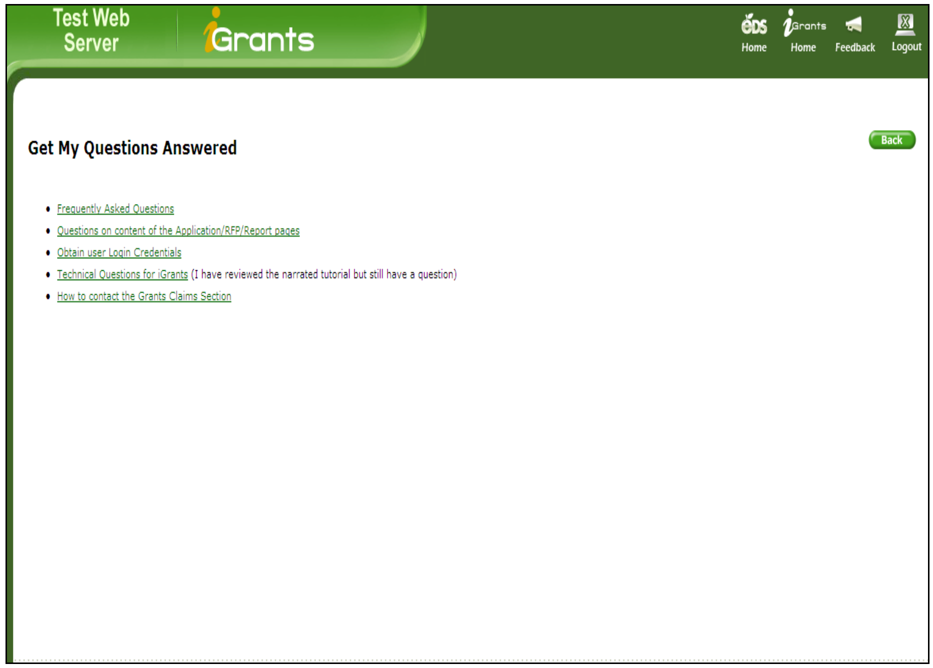
Notes:

- From the iGrants login page, **set a bookmark** to make future logins quicker.
- The EDS applications – which include iGrants – are designed to use **Internet Explorer 6.0** or greater as the Web browser. It is best not to use other browsers. See Appendix A for details about browser settings.

2. iGrants Home Page

I Need To…

1. Depending upon what you need to do, you can navigate to various pages by clicking the appropriate link from the iGrants home page.

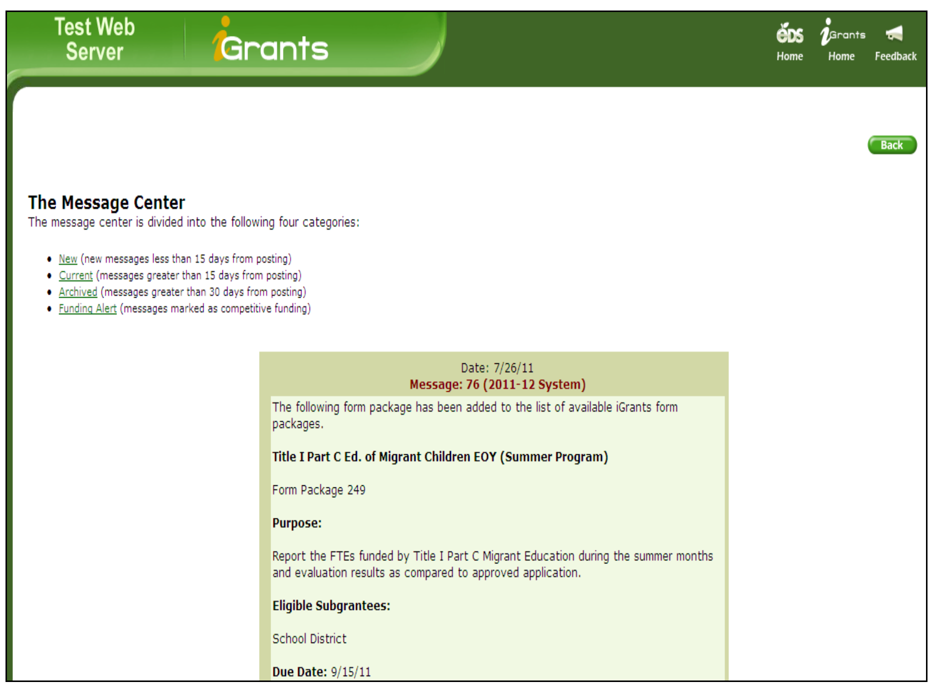


Notes:

- Clicking **Login to iGrants** would take you to the iGrants login page.
- Clicking the following links will display pages with corresponding information:
  - **Obtain user Login Credentials**
  - **Get My Questions Answered**
  - **Get a list of form package contacts**

Message Center

1. Clicking the **Message Center** link on iGrants home page displays the Message Center page which is used to display any New, Current, or Archived messages regarding form package activations.



Notes:

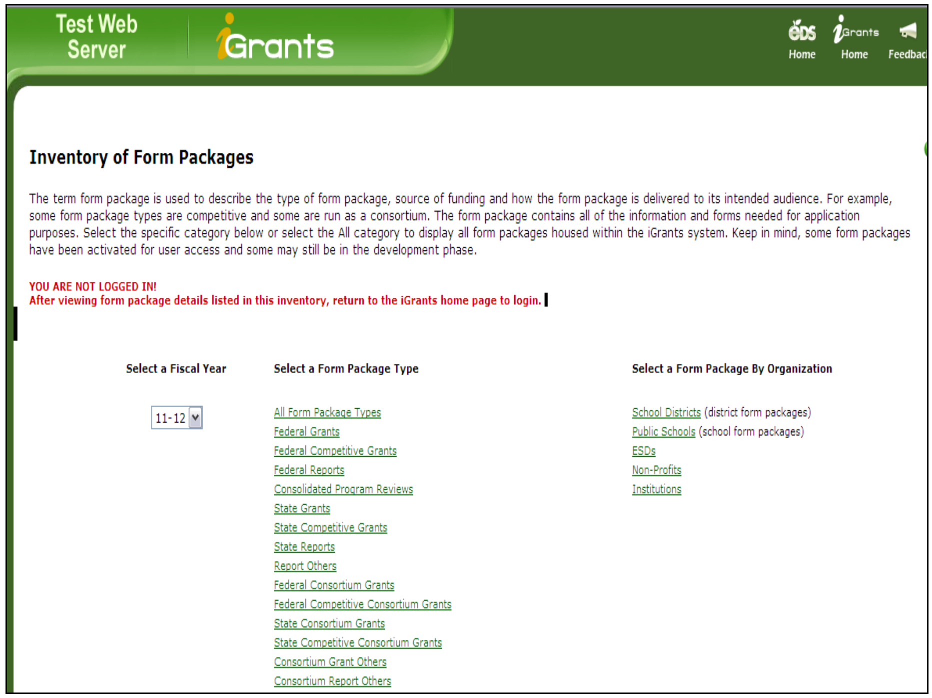
- Click on the appropriate link (**New**, **Curren**t, or **Archived**) to see messages.
- Click the **Print** icon to print the page.

Topics

1. The iGrants home page also displays links to the following Topics:
   - ❖ **Inventory of Form Packages**
   - ❖ **Allocations**
   - ❖ **Indirect Rates**
   - ❖ **Carryover**

Notes:

- Clicking the **Inventory of Form Packages** link displays a list of form package types.
- Use the fiscal year drop-down to see form packages from prior years.



Test Web Server iGrants

Home Home Feedbac

Inventory of Form Packages

The term form package is used to describe the type of form package, source of funding and how the form package is delivered to its intended audience. For example, some form package types are competitive and some are run as a consortium. The form package contains all of the information and forms needed for application purposes. Select the specific category below or select the All category to display all form packages housed within the iGrants system. Keep in mind, some form packages have been activated for user access and some may still be in the development phase.

YOU ARE NOT LOGGED IN!
After viewing form package details listed in this inventory, return to the iGrants home page to login.

Select a Fiscal Year	Select a Form Package Type	Select a Form Package By Organization
11-12	All Form Package Types Federal Grants Federal Competitive Grants Federal Reports Consolidated Program Reviews State Grants State Competitive Grants State Reports Report Others Federal Consortium Grants Federal Competitive Consortium Grants State Consortium Grants State Competitive Consortium Grants Consortium Grant Others Consortium Report Others	School Districts (district form packages) Public Schools (school form packages) ESDs Non-Profits Institutions

2. Clicking the link for **form package type** or **organization** on the Inventory of Form Packages page displays the form package details including contact information for each form package.

Note:

- Click the **Back** button to return to the home page.

Test Web Server iGrants

Home Home Feedback

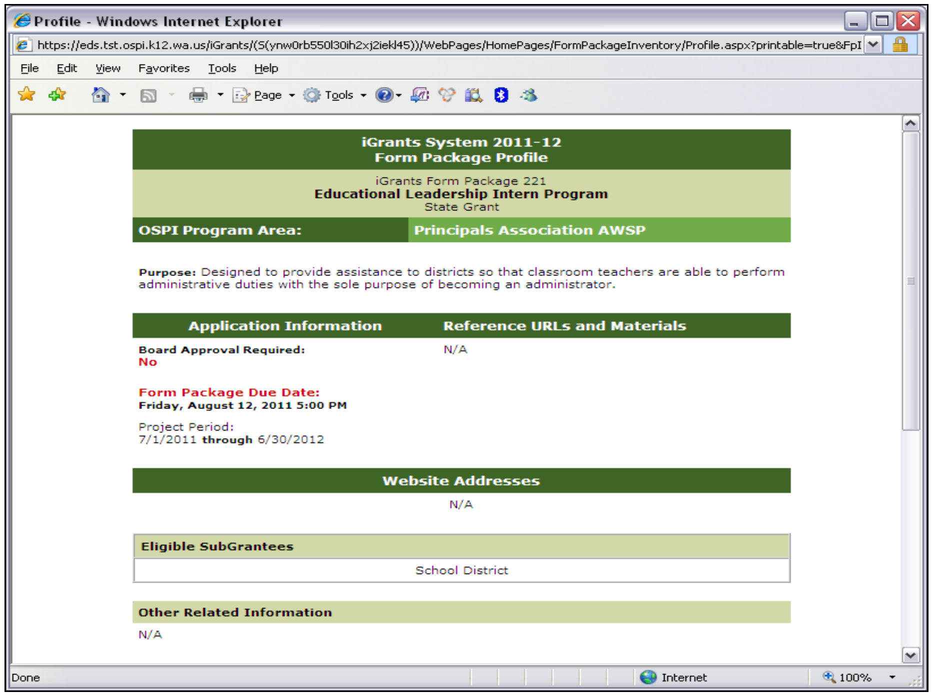
Selected Category Is: State Grant

Back

Abbreviation **FP:** Form Package - **OPEN:** Available - **Closed:** Unavailable - **In Development:** Under Construction
Press the name of the form package to access the purpose and other profile information.

FP ID	FP Name/Profile	Type	Audience	Program Area	Status	Activation Date	Due Date	Funding Amounts	OSPI Program Contact	Grant Analyst	Budget Information
221	Educational Leadership Intern Program	State Grant	School District	Principals Association AWSP	Open	6/16/2011	8/12/2011		Linda Thomas AWSP 360.357.7951 linda@awsp.org	Staci Brooks Director, Grants Management 360.725.6278 staci.brooks@k12.wa.us	Go
409	Full-Day Kindergarten (Pasco Only)	State Grant	School District	Early Learning	Open	6/22/2011	7/15/2011		Mercedes Eckroth Program Support 360.725.4952 mercedes.eckroth@k12.wa.us		
359	Full-Day Kindergarten (Renewal)	State Grant	School District	Early Learning	Open	6/10/2011	6/27/2011		Mercedes Eckroth Program Support 360.725.4952 mercedes.eckroth@k12.wa.us		
217	Highly Capable Students Program	State Grant	School District	Highly Capable	Open	6/9/2011	7/1/2011	Go	Gayle Pauley Director 360.725.6100 gayle.pauley@k12.wa.us Jody Hess Program Supervisor 360-725-6230 Jody.Hess@k12.wa.us Sandy Benedetti Program Support 360-725-6101 sandy.benedetti@k12.wa.us	Steve Shish Apportionment Steve.Shish@k12.wa.us	Go
218	Learning Assistance Program (LAP)	State Grant	School District	Special Programs and Federal	Open	6/3/2011	7/1/2011	Go	Gayle Pauley Director 360.725.6100	Steve Shish Apportionment Steve.Shish@k12.wa.us	Go

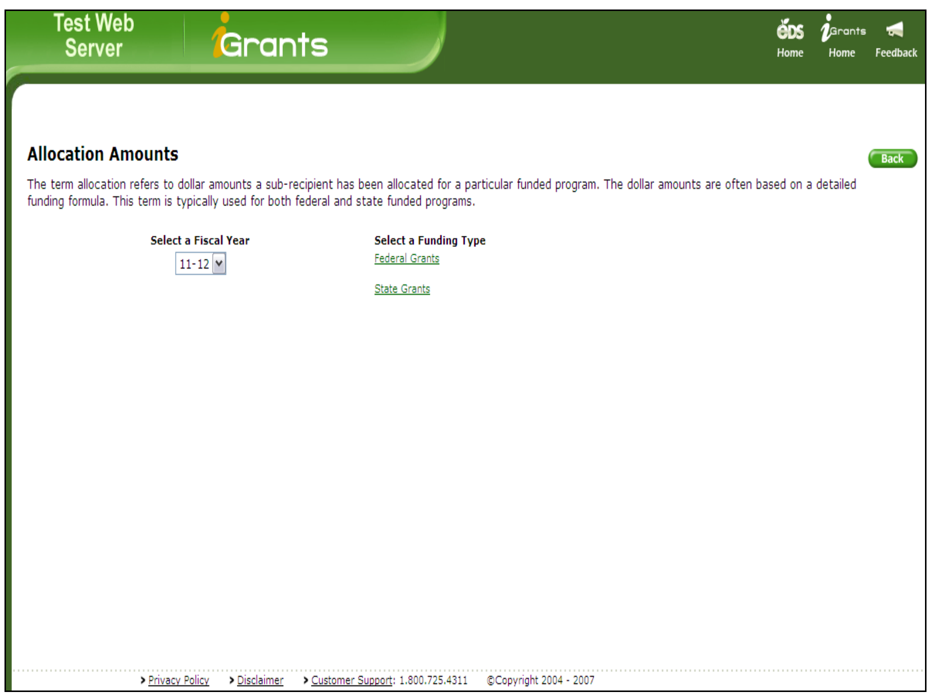
3. Clicking the **FP Name/Profile** link or **Go**, the page refreshes to display the form package profile page. The **profile page** gives general information about the form package, including due date, purpose, eligible sub grantees, contact information, etc.



4. Clicking the **Allocation** hyperlink on the iGrants home page displays the **Allocation Amounts** page.

   The fiscal year defaults to the current year, but you can use the drop-down filter to view allocations for prior years.

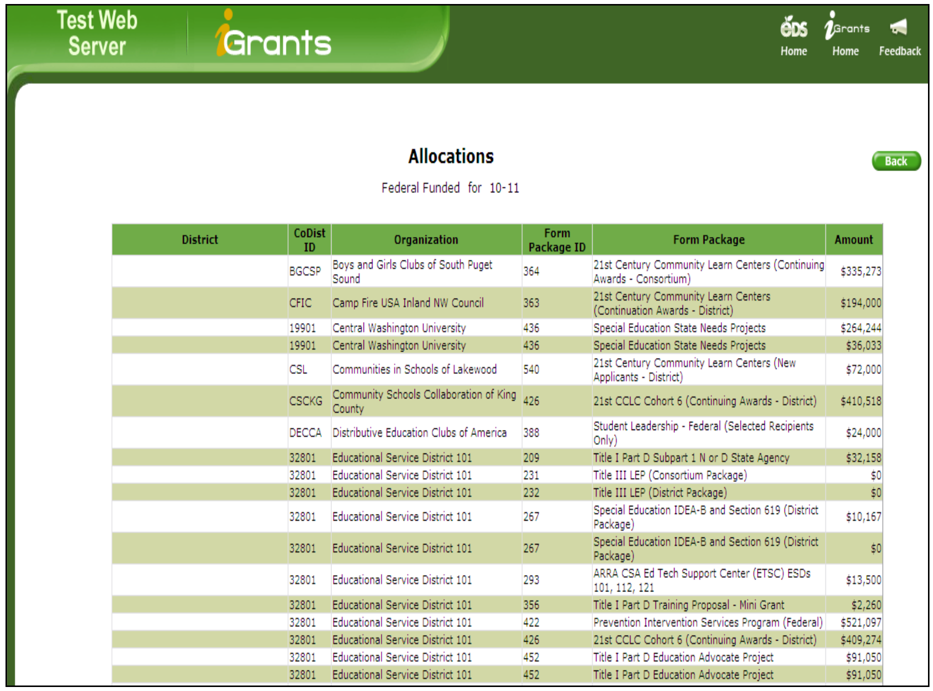
   Select **Federal** or **State** grants to generate a report.



5. Clicking **Select a Funding Type** link on Allocation Amounts page displays allocation amounts for different form packages sorted by organization name.

Notes:

- Click the **Back** button to go back to the home page.
- Click the **Print** icon to open the page in printer friendly view.



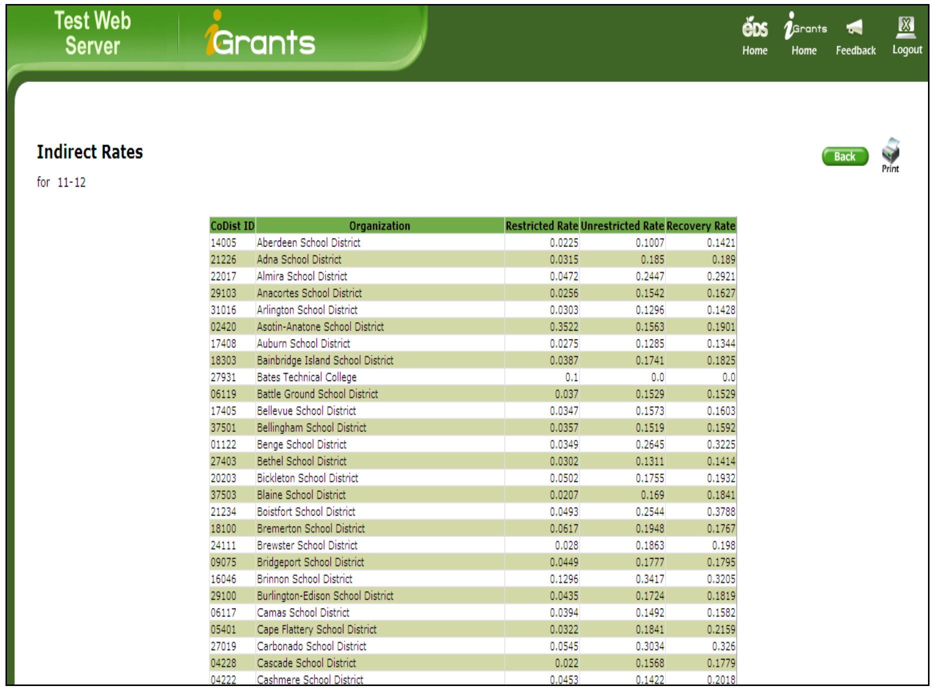
District	CoDist ID	Organization	Form Package ID	Form Package	Amount
	BGCSP	Boys and Girls Clubs of South Puget Sound	364	21st Century Community Learn Centers (Continuing Awards - Consortium)	$335,273
	CFIC	Camp Fire USA Inland NW Council	363	21st Century Community Learn Centers (Continuation Awards - District)	$194,000
	19901	Central Washington University	436	Special Education State Needs Projects	$264,244
	19901	Central Washington University	436	Special Education State Needs Projects	$36,033
	CSL	Communities in Schools of Lakewood	540	21st Century Community Learn Centers (New Applicants - District)	$72,000
	CSCKG	Community Schools Collaboration of King County	426	21st CCLC Cohort 6 (Continuing Awards - District)	$410,518
	DECCA	Distributive Education Clubs of America	388	Student Leadership - Federal (Selected Recipients Only)	$24,000
	32801	Educational Service District 101	209	Title I Part D Subpart 1 N or D State Agency	$32,158
	32801	Educational Service District 101	231	Title III LEP (Consortium Package)	$0
	32801	Educational Service District 101	232	Title III LEP (District Package)	$0
	32801	Educational Service District 101	267	Special Education IDEA-B and Section 619 (District Package)	$10,167
	32801	Educational Service District 101	267	Special Education IDEA-B and Section 619 (District Package)	$0
	32801	Educational Service District 101	293	ARRA CSA Ed Tech Support Center (ETSC) ESDs 101, 112, 121	$13,500
	32801	Educational Service District 101	356	Title I Part D Training Proposal - Mini Grant	$2,260
	32801	Educational Service District 101	422	Prevention Intervention Services Program (Federal)	$521,097
	32801	Educational Service District 101	426	21st CCLC Cohort 6 (Continuing Awards - District)	$409,274
	32801	Educational Service District 101	452	Title I Part D Education Advocate Project	$91,050
	32801	Educational Service District 101	452	Title I Part D Education Advocate Project	$91,050

6. Clicking the **Indirect Rates** link on iGrants home page displays a page which describes the purpose of the indirect rate followed by a drop-down for fiscal year.

Note:

- The fiscal year defaults to the current year.

7. Clicking the go button on the **Indirect Rates** page displays the indirect rates by type for organizations by the selected fiscal year.

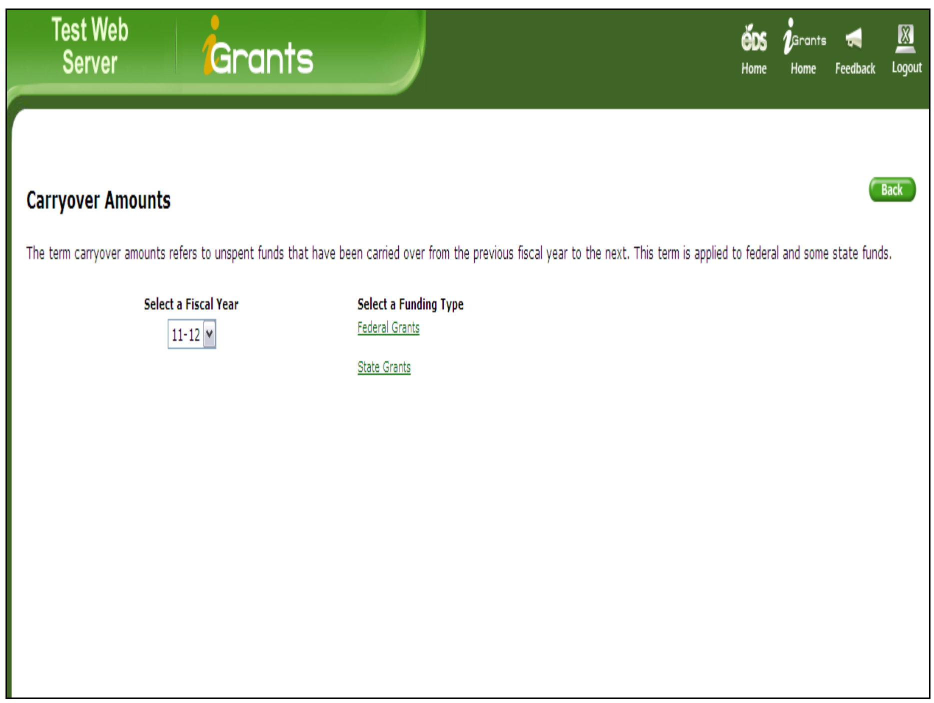


CoDist ID	Organization	Restricted Rate	Unrestricted Rate	Recovery Rate
14005	Aberdeen School District	0.0225	0.1007	0.1421
21226	Adna School District	0.0315	0.185	0.189
22017	Almira School District	0.0472	0.2447	0.2921
29103	Anacortes School District	0.0256	0.1542	0.1627
31016	Arlington School District	0.0303	0.1296	0.1428
02420	Asotin-Anatone School District	0.3522	0.1563	0.1901
17408	Auburn School District	0.0275	0.1285	0.1344
18303	Bainbridge Island School District	0.0387	0.1741	0.1825
27931	Bates Technical College	0.1	0.0	0.0
06119	Battle Ground School District	0.037	0.1529	0.1529
17405	Bellevue School District	0.0347	0.1573	0.1603
37501	Bellingham School District	0.0357	0.1519	0.1592
01122	Benge School District	0.0349	0.2645	0.3225
27403	Bethel School District	0.0302	0.1311	0.1414
20203	Bickleton School District	0.0502	0.1755	0.1932
37503	Blaine School District	0.0207	0.169	0.1841
21234	Boistfort School District	0.0493	0.2544	0.3788
18100	Bremerton School District	0.0617	0.1948	0.1767
24111	Brewster School District	0.028	0.1863	0.198
09075	Bridgeport School District	0.0449	0.1777	0.1795
16046	Brinnon School District	0.1296	0.3417	0.3205
29100	Burlington-Edison School District	0.0435	0.1724	0.1819
06117	Camas School District	0.0394	0.1492	0.1582
05401	Cape Flattery School District	0.0322	0.1841	0.2159
27019	Carbonado School District	0.0545	0.3034	0.326
04228	Cascade School District	0.022	0.1568	0.1779
04222	Cashmere School District	0.0453	0.1422	0.2018

Notes:

- Click the **Back** button to return to previous page
- Click the **Print** icon to print the page.

8. Clicking the **Carryover** link on iGrants home page displays the **Carryover Amounts** page.



Notes:

- **Select a Fiscal Year** from the drop-down. The fiscal year defaults to the current year.
- **Select a Funding Type** by clicking on the **Federal Grants** or **State Grants** link.

9. Clicking the funding type link on the carryover amounts page displays the appropriate **carryover amounts** for all organizations by form package for the selected fiscal year.

Notes:

- Click the **Back** button to return to previous page.
- Click the **Print** icon to print the page.

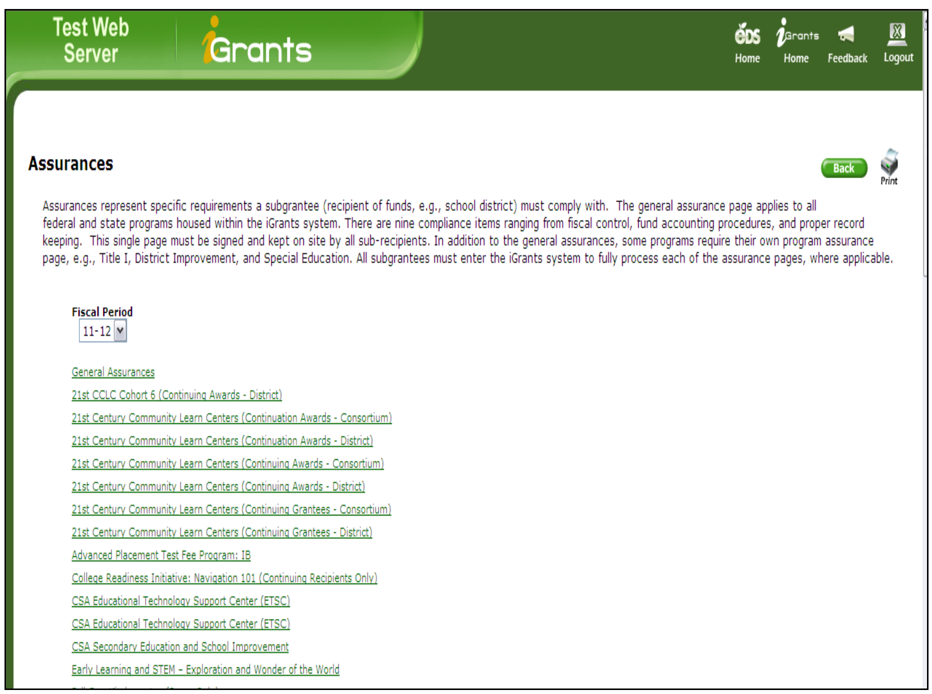
CoDist ID	Organization	Form Package ID	Form Package	Amount	Budget Category
2834	A J West Elementary	366	EETT Peer Coaching (Selected Recipients Only)	$3,503	
2834	A J West Elementary	502	ARRA Peer Coaching (Carryover Only)	$468	
2834	A J West Elementary	503	ARRA Teaching and Learning in the 21st Century (TL21)	$2,425	
14005	Aberdeen School District	201	Title I, Part A Improving Basic Programs	$365,030	
14005	Aberdeen School District	208	Title I Part D Subpart 2 Neglected or Delinquent Local Agency	$19,953	2010-11
14005	Aberdeen School District	232	Title III LEP (District Package)	$48,058	
14005	Aberdeen School District	236	Title II Part D Enhancing Education Through Technology	$3,172	2010-11 Funding
14005	Aberdeen School District	239	Title II Part A Teacher Principal Training and Recruiting	$200,056	
14005	Aberdeen School District	262	Rural and Low-Income School Grant	$7,116	
14005	Aberdeen School District	267	Special Education IDEA-B and Section 619 (District Package)	$39,965	IDEA-B
14005	Aberdeen School District	267	Special Education IDEA-B and Section 619 (District Package)	$2,344	Section 619
14005	Aberdeen School District	416	21st Century Community Learn Centers (Continuing Awards - District)	$75,290	
14005	Aberdeen School District	426	21st CCLC Cohort 6 (Continuing Awards - District)	$73,590	
14005	Aberdeen School District	482	ARRA Title I, Part A	$170,191	
14005	Aberdeen School District	485	ARRA McKinney-Vento Homeless Children and Youth	$5,101	
14005	Aberdeen School District	487	ARRA Special Education IDEA B and Section 619 Carryover Funds	$390,731	IDEA-B
14005	Aberdeen School District	487	ARRA Special Education IDEA B and Section 619 Carryover Funds	$12,947	Section 619
14005	Aberdeen School District	500	ARRA Title II Part D (Carryover Only)	$9,456	
3209	Abraham Lincoln Elementary	366	EETT Peer Coaching (Selected Recipients Only)	$1,601	
3209	Abraham Lincoln Elementary	502	ARRA Peer Coaching (Carryover Only)	$947	
3209	Abraham Lincoln Elementary	503	ARRA Teaching and Learning in the 21st Century (TL21)	$2,353	
2585	Acme Elementary	503	ARRA Teaching and Learning in the 21st Century (TL21)	$1,940	
2156	Adams Elementary	366	EETT Peer Coaching (Selected Recipients Only)	$1,827	
21226	Adna School District	201	Title I, Part A Improving Basic Programs	$0	
21226	Adna School District	236	Title II Part D Enhancing Education Through Technology	$1	2010-11 REAP

Resources

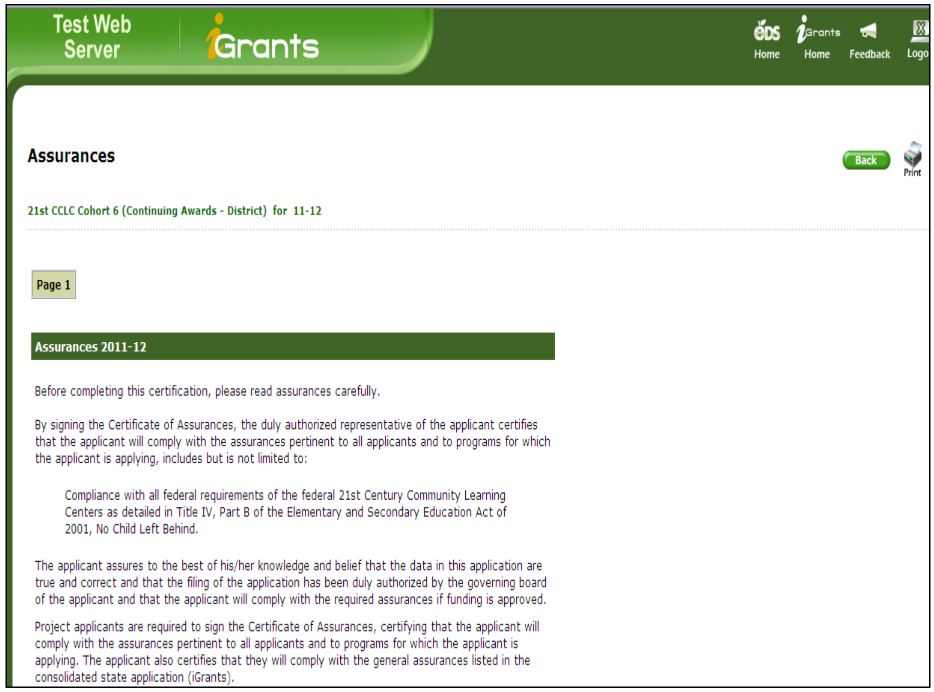
1. Clicking the **Assurances** link on iGrants home page displays a page which describes the purpose of assurances and gives a list of individual federal and state program assurances.

Note:

- Select the appropriate fiscal year from the drop-down. The fiscal year defaults to the current year.



2. Clicking any of the program links displays a page with the list of assurances associated with that program.



3. Clicking the **General Resource Information** link on iGrants home page displays links to supportive documents on topics such as:
   - ❖ ARRA (Stimulus) Guidance
   - ❖ DUNS Numbers
   - ❖ ESEA
   - ❖ Nine Characteristics
   - ❖ Transferability & REAP Guidance
   - ❖ Time and Effort
   - ❖ Comparability
   - ❖ Lifecycle of a Grant
   - ❖ Dollar Flow (Federal)
   - ❖ Dollar Flow (State)
   - ❖ Faith Based
   - ❖ SAS Timeline

Customer Service

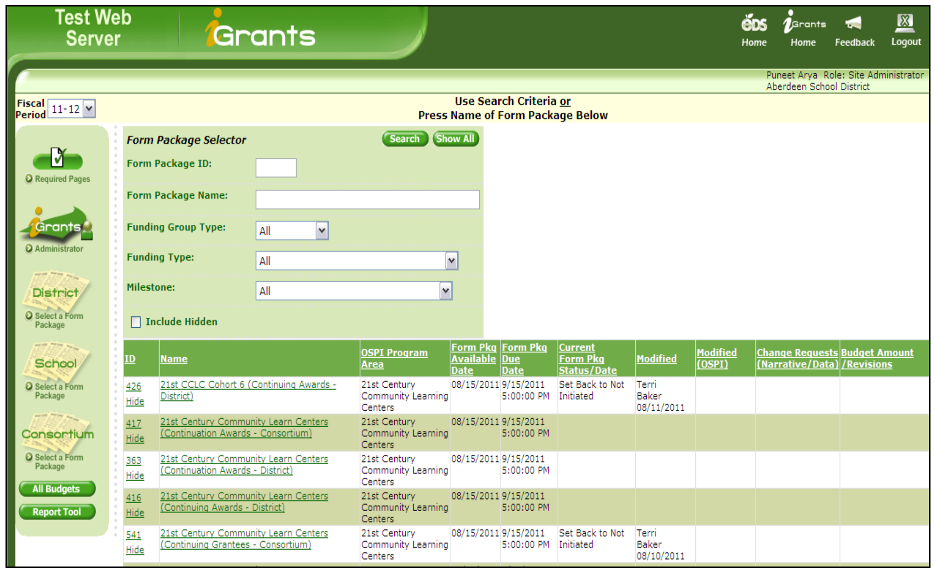
Clicking the **Contact Us with Technical Issues** link displays the following technical support contact information.

Please contact. . .	When you need help with. . .
District Data Security Manager (school districts only)	• Setting up accounts (first-time users) • Login or access issues • Forgotten or expired passwords • Changing role assignments • Technical assistance with local computer and/or network
Customer Support / 800-725-4311 #7 (ESD, college/university, non-profit or for-profit organization)	• Setting up accounts (first-time users) • Login or access issues • Forgotten or expired passwords • Changing role assignments
Program Contacts (see Profile Page for contact names and phone numbers)	All program related questions regarding: • Application content • Timelines/deadlines • Budgets • Appropriate use of funds
OSPI iGrants Staff Terri Vatne/Jan Burt (360) 725-4956 iGrants@k12.wa.us	Technical assistance due to iGrants system malfunction, e.g., • Data isn't saving • A calculation isn't working correctly • Trouble submitting a form package • Don't see a form package displayed on your list of available form packages
Grants Management/Claims Holly Hill (360) 725-6281 holly.hill@k12.wa.us Michelle Sartain (360) 725-6282 michelle.sartain@k12.wa.us	• All claims-related questions. Even though the budget is created in iGrants, claims is a separate EDS system managed by grants management staff, not iGrants.

3. Entering Form Package Data

The **Form Package Selector** page displays when you log into the iGrants System. It is used to find form packages that have been created for current or past fiscal years, depending on the fiscal period selected in the drop-down in the left-hand corner of the page. The form package initially displays with the status of **Not Initiated.** The form package pages are sometimes pre-populated even though the status is Not Initiated. That means the data entered last year has been copied over to the current fiscal period. Clicking **Save** changes the form package status to **Draft.**

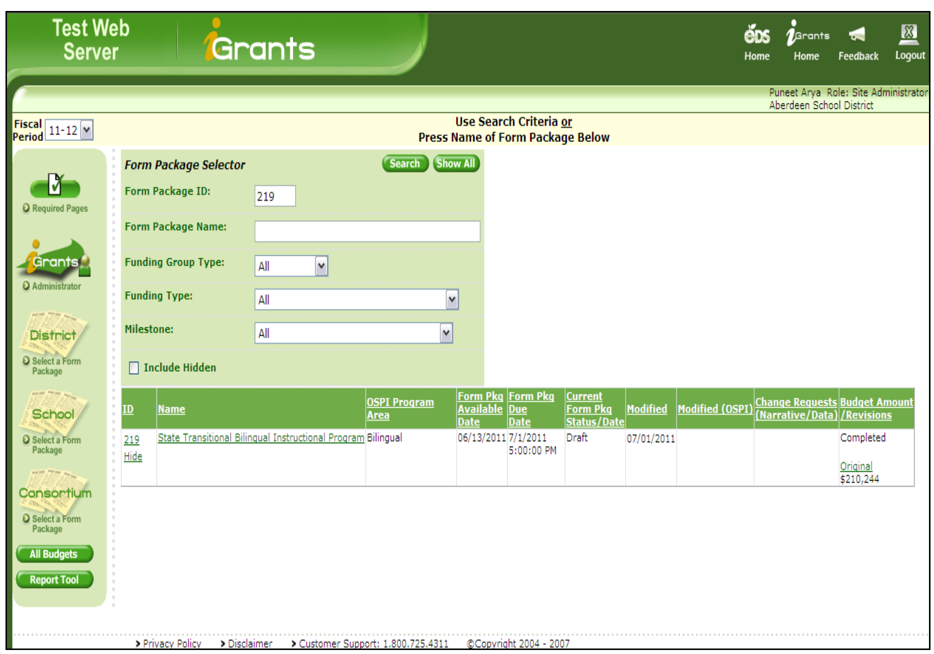
1. The initial view of the **Form Package Selector** page displays once you log into the iGrants system. The page displays the list of form packages a district can apply for.



Notes:

- Clicking the **Hide** link would hide the form package. This feature is specific to an individual computer.
- Click the **Include Hidden** checkbox and **Search** to **Unhide** the form package in the list.

2. The search feature on the Form Package Selector page is used to search for specific form packages.



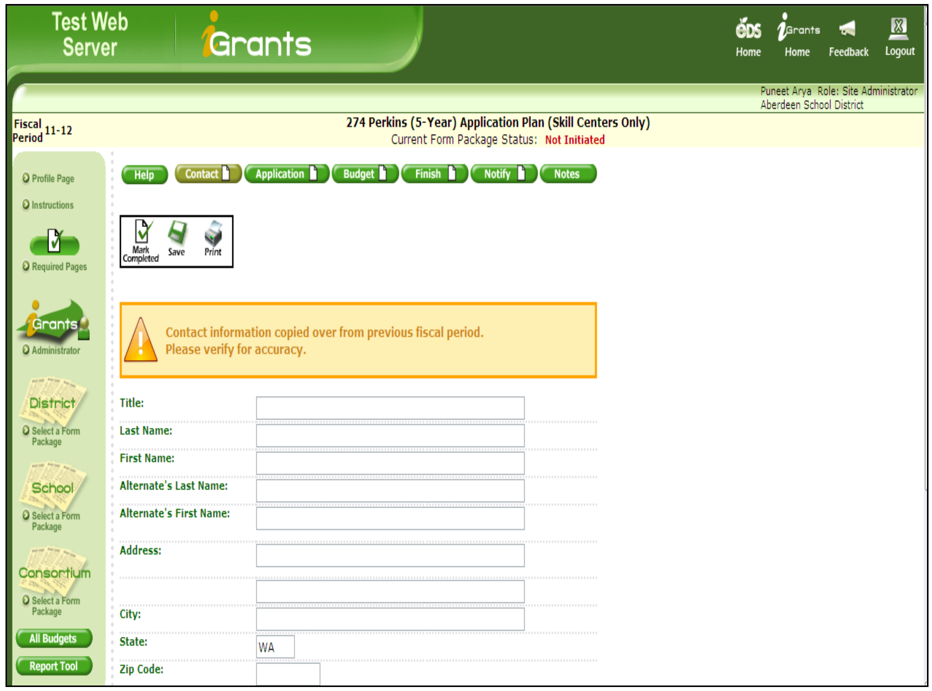
Notes:

- To locate a form package, enter the **3-digit Form Package ID**; click Search.
- You can view information on form package name, ID#, available date, due date, current status, and budget info/status.
- The default is to display data sorted by organization, but you can sort differently by clicking on the column headers.

3. Clicking form package name or the ID displays the form package detail pages.

Notes:

- The contact page is the default page which displays, when you click the form package name or ID.
- Enter or update the data as required and click **Save**.
- The top of the page displays the form package name and the current status.
- Clicking **Set Back to Draft** icon would change the page status to draft and the icon changes to **Mark Completed.**
- After entering the data, click **Save** and **Mark Completed**.



4. Clicking the **Application** tab, displays the form package pages**.**

Notes:

- Enter or update data as required and click the **Save** icon.
- Click the **Print All** icon to view and print all form package pages.
- After entering the data, click **Save** and **Mark Completed**.

5. Enter **Save** data on all the required pages and mark each page complete.

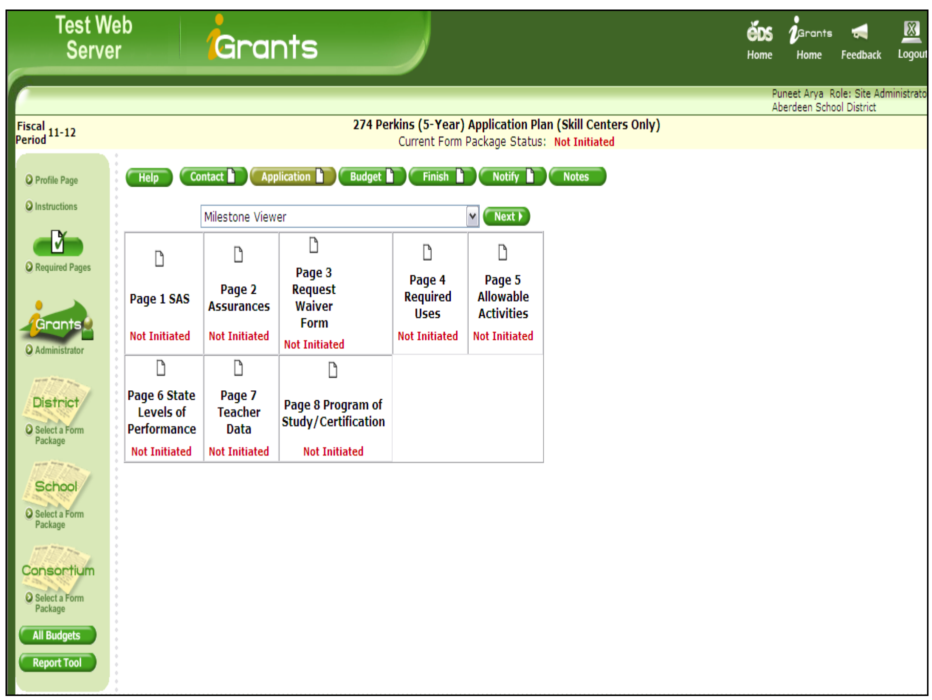
Note:

- Click **Next** to navigate between the pages.

6. Select the **Milestone Viewer** from the page drop-down to display the status of all form package pages.

Note:

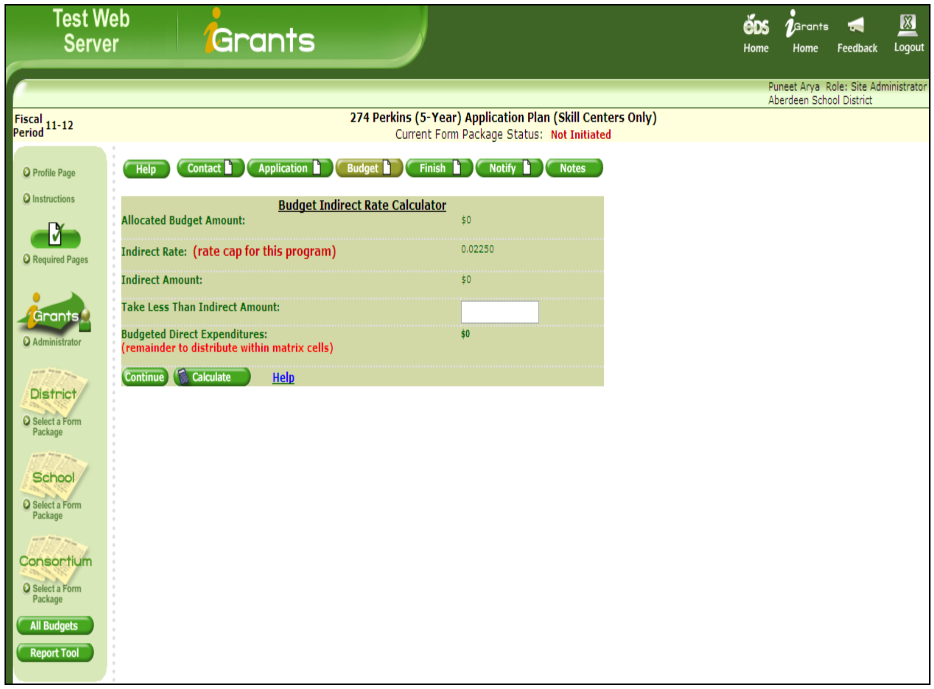
- Clicking the page icon will display that page.



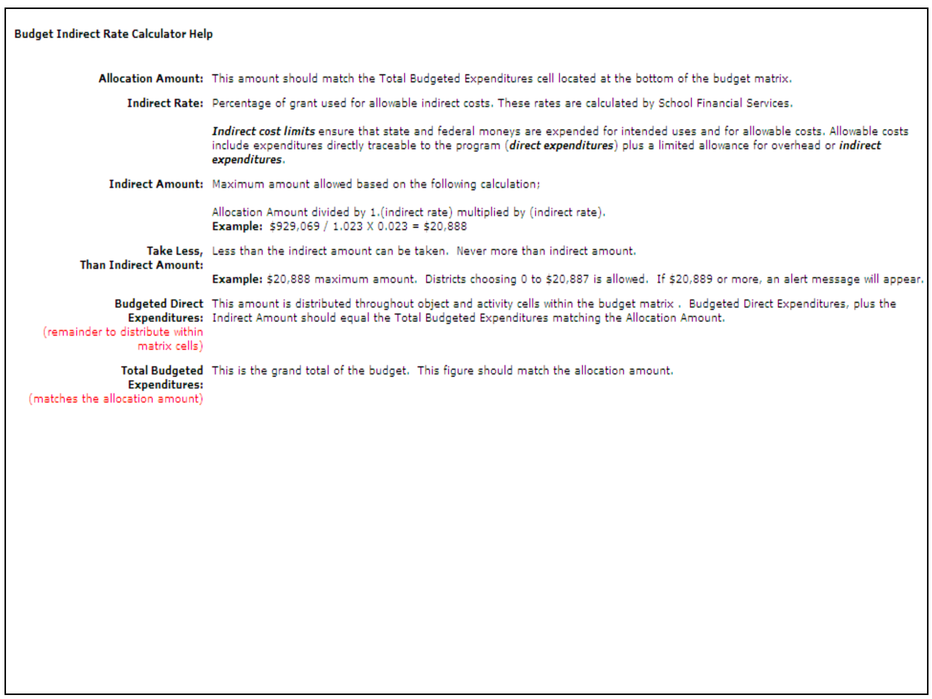
7. Clicking the **Budget** tab displays either the page to create a new budget or the list of existing budgets.

Notes:

- If you are creating a new budget, click the New button which will take you to the **Budget Indirect Rate Calculator.**
- If you are taking less than the indirect amount displayed, enter the amount in the white field, then use the Calculate button to recalculate the **Budgeted Direct Expenditures** amount.



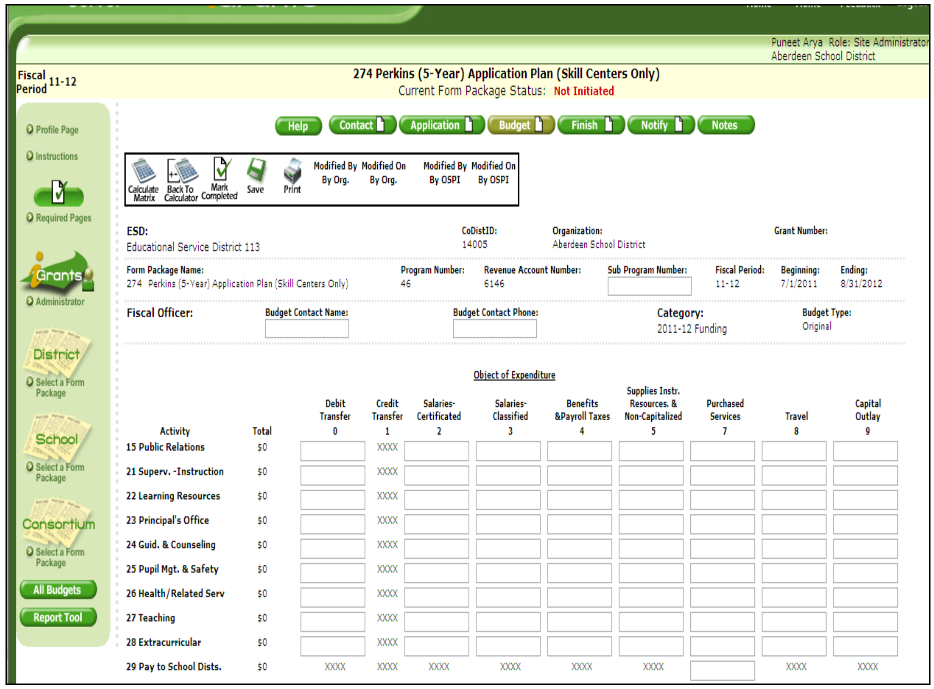
8. Clicking the Help hyperlink displays the help page with the information on Budget Indirect Rate calculator.



Budget Indirect Rate Calculator Help

Allocation Amount:	This amount should match the Total Budgeted Expenditures cell located at the bottom of the budget matrix.
Indirect Rate:	Percentage of grant used for allowable indirect costs. These rates are calculated by School Financial Services.
	Indirect cost limits ensure that state and federal moneys are expended for intended uses and for allowable costs. Allowable costs include expenditures directly traceable to the program (***direct expenditures***) plus a limited allowance for overhead or ***indirect expenditures***.
Indirect Amount:	Maximum amount allowed based on the following calculation:
	Allocation Amount divided by 1.(indirect rate) multiplied by (indirect rate). **Example:** $929,069 / 1.023 X 0.023 = $20,888
Take Less, Than Indirect Amount:	Less than the indirect amount can be taken. Never more than indirect amount.
	Example: $20,888 maximum amount. Districts choosing 0 to $20,887 is allowed. If $20,889 or more, an alert message will appear.
Budgeted Direct Expenditures: (remainder to distribute within matrix cells)	This amount is distributed throughout object and activity cells within the budget matrix. Budgeted Direct Expenditures, plus the Indirect Amount should equal the Total Budgeted Expenditures matching the Allocation Amount.
Total Budgeted Expenditures: (matches the allocation amount)	This is the grand total of the budget. This figure should match the allocation amount.

9. Clicking **Continue** on the Budget Indirect Rate Calculator page displays the **Budget Matrix**.



Notes:

- Enter/update data as required; click **Save**.
- Click **Back to Calculator** icon if you need to review figures from the calculator page.
- Once you click **Calculate Matrix**, the page refreshes to display the calculated values. Clicking **Save** will also calculate the page.
- Enter **Comments** at the bottom of the page, if appropriate, and click **Save.**
- Click **Mark Completed** to finalize budget. A check mark will display in the budget tab.

10. Once you enter data, save, and mark all pages complete, click the **Finish** tab. The page refreshes to display icons for all form package components.

Notes:

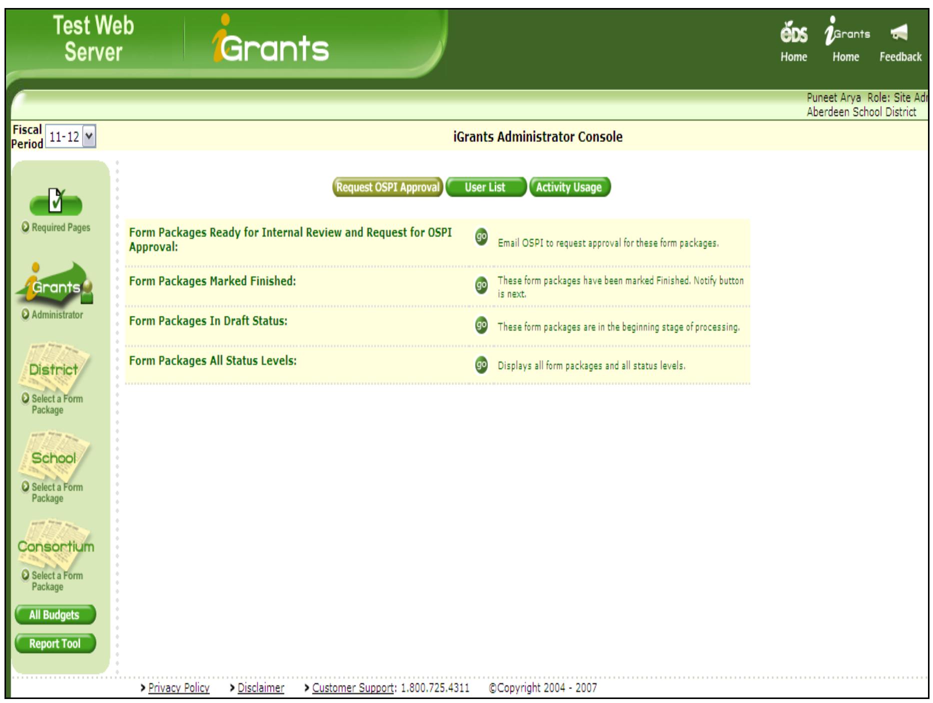
- The **Finish** page will display a check mark in each icon if that section is complete. If there is not a check mark in the icon, go back to that tab and make sure all pages are marked completed.
- All the icons, including the one for Required Pages (located in the left-hand navigation bar), must display a check mark in order to submit a form package for internal Org Review.

11. Once all pages have been marked compete and you have clicked the Finish tab, click the **Notify** tab to send an email to your organization's iGrants Administrator.

Notes:

- Click the **Send Message** button to send the email.
- Current form package status now changes to **Under Org Review**.

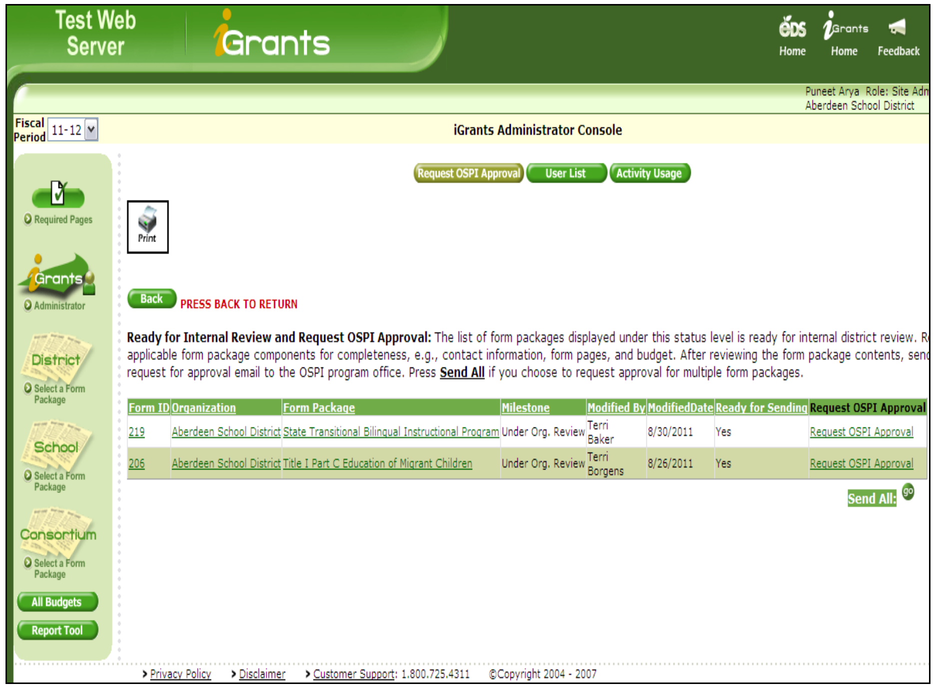
12. Once you have clicked Notify and the form package has been assigned the status of Under Org Review, the form package can be submitted to OSPI for review.



Notes:

- **Submitting a form package to OSPI** can only be done by your organization's iGrants Administrator.
- The iGrants Administrator must click the **iGrants Administrator icon** in the left-hand navigation bar to reveal the **iGrants Administrator Console.**
- Click the go button to display form packages ready to send to OSPI for approval.

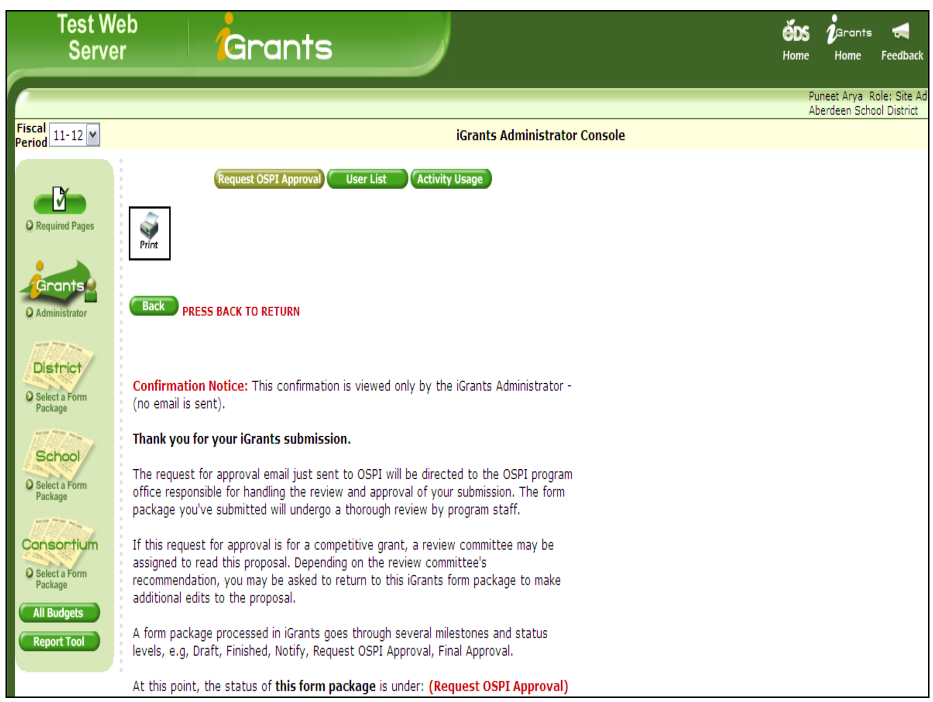
13. Clicking the go button displays the list of form packages ready to submit to OSPI.



Notes:

- Clicking the **Request OSPI Approval** link changes the form package status to **Requested OSPI Approval** and sends an email to the OSPI program manager.
- Clicking the **Send All** go button submits all the form packages displayed on the list.
- Once the form package status is changed to **Requested OSPI Approval,** the organization is locked out and cannot make further changes.

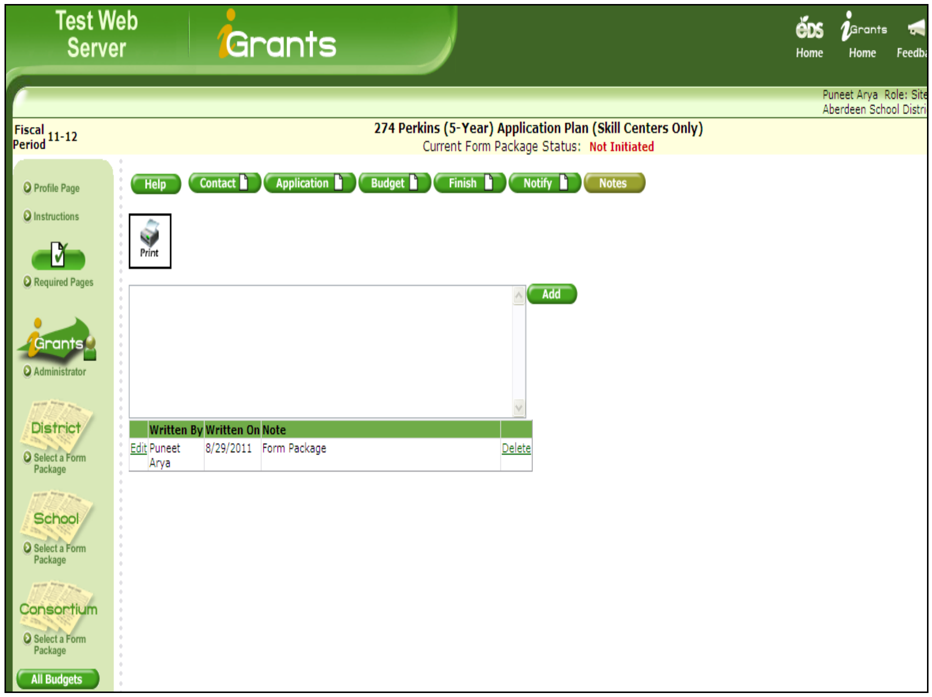
14. Clicking the **Request OSPI Approval** link displays the **Confirmation Page.**



Notes:

- Click the **Print** icon to print.
- Click the **Back** button to navigate to the previous page.
- The iGrants Administrator can also access the **User List** and **Activity Usage** tabs to get information on iGrants users and system usage.

15. Click on the **Notes** tab to enter and view notes.



Notes:

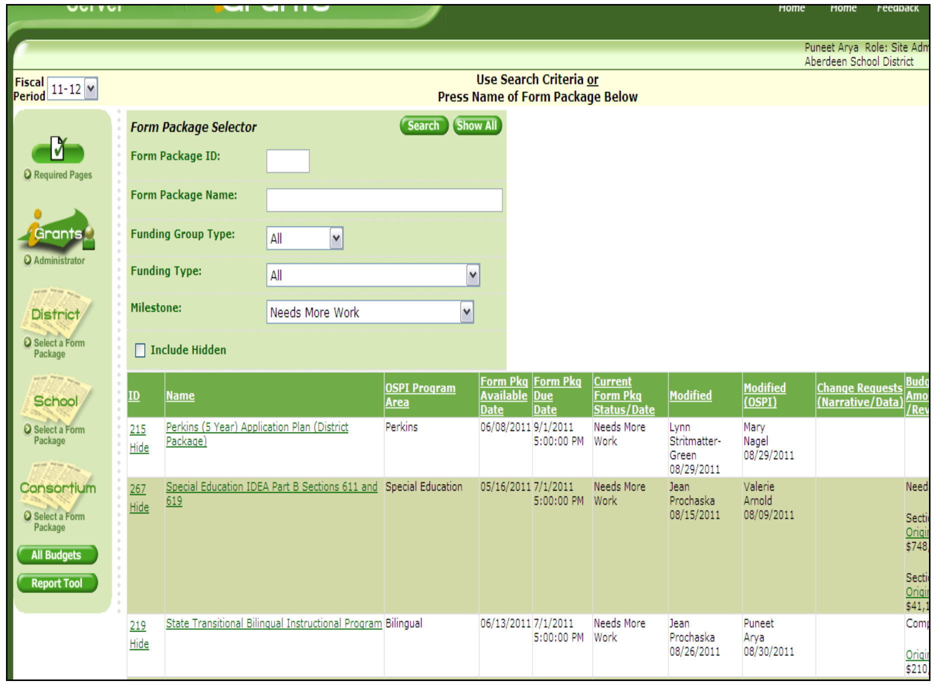
- All system-generated emails are recorded in Notes.
- You may also manually enter notes in the text box and click the **Add** button. The page refreshes to display your message in the notes table. The system will also record your name and the date of manual entry.

4. Changing Form Package Data

Pre-Approval Changes

Prior to form package approval, OSPI reviewers often send form packages back to districts for further work. The form package status is then changed from **Under OSPI Review** to **Needs More Work.**

1. To find form packages that have been put under Needs More Work, use the Milestone drop-down on the Form Package Selector page. Select **Needs More Work** and click **Search.** The page refreshes to display only those form packages in Needs More Work status.



Note:

- Click form package name or ID to see the form package data**.**

2. The tab containing pages that need more work displays a **Yellow icon**. Pages needing more work show a status of **Needs More Work** on the drop-down list of pages. (If there is only one page in the form package, this is not the case.)

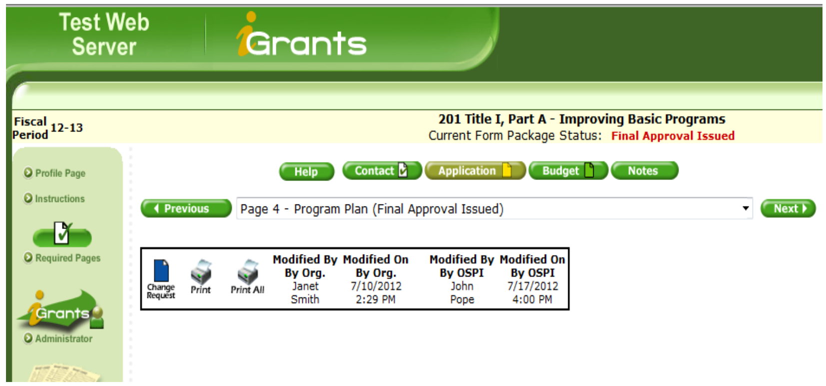
Notes:

- Click **Req. OSPI Review** when done with changes .
- The **form package status will remain as Needs More Work** until OSPI puts the corrected page(s) under review. At that point, status will change to **Under OSPI Review.**

Post-Approval Changes – Form Package Pages

1. To change data on a page *after* form package approval, use the blue Change Request icon.

   Clicking on the **Change Request** icon will bring up an email to send to OSPI requesting them to unlock a page so you can make changes. The form package status will remain **Final Approval Issued**, but **Forms Unlocked for Changes** will appear on the Form Package Selector page for that form package.

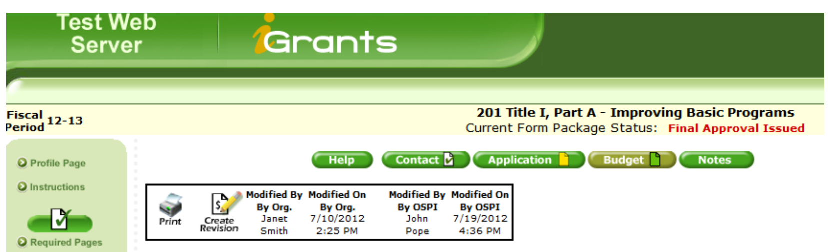


2. When you have finished making your changes, click the red **Req. OSPI Review** button to bring up the OSPI notification email.

3. After reviewing your changes, OSPI staff will either send it back for further changes or mark the page approved.

Post-Approval Changes – Budget Revisions

1. To revise a budget, click into the current approved budget.



2. Click the **Create Revision** icon. This will take you to the budget calculator.

3. Click **Continue** to get to the budget matrix.

4. Manually redistribute dollar amounts to desired fields and click **Save**.

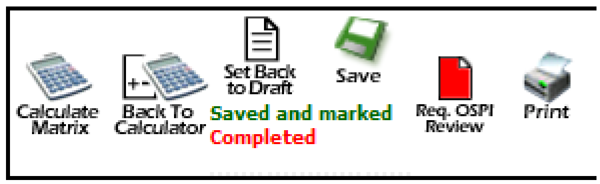
Note: If an **error message** comes up after clicking Save, you will need to **correct the error** before the system will save your changes.

5. Changes will be recorded at the bottom of the budget matrix

page. Record the reason for your changes in the **Revision Comments** field.

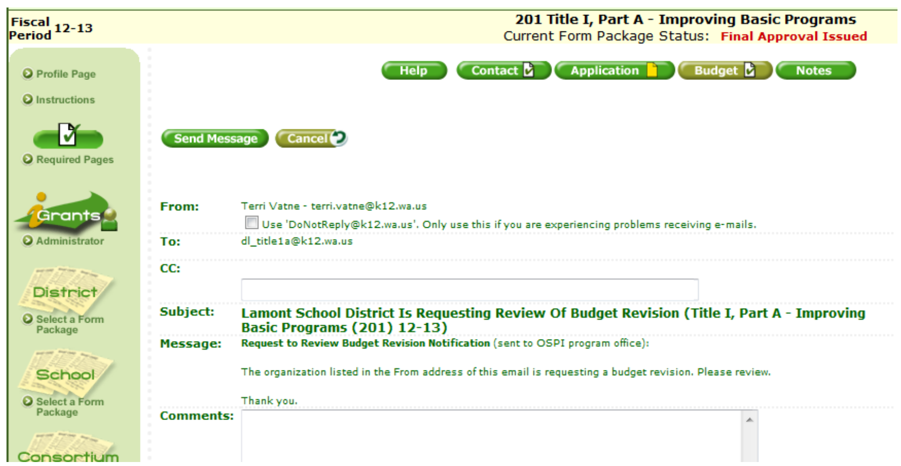
6. Click the **Mark Completed** icon. At that point, the Req. OSPI Review icon will appear.

7. Click the red **Req. OSPI Review** icon to bring up the email to send to OSPI notifying them of your budget revision.



8. Send the email to OSPI.

9. OSPI program staff will review your budget revision and forward it to grants management. Once grants management has recorded the revision in the claims system, OSPI program staff will approve the budget revision. At that point, you will be able to make claims against your revised budget amounts.



5. Claims

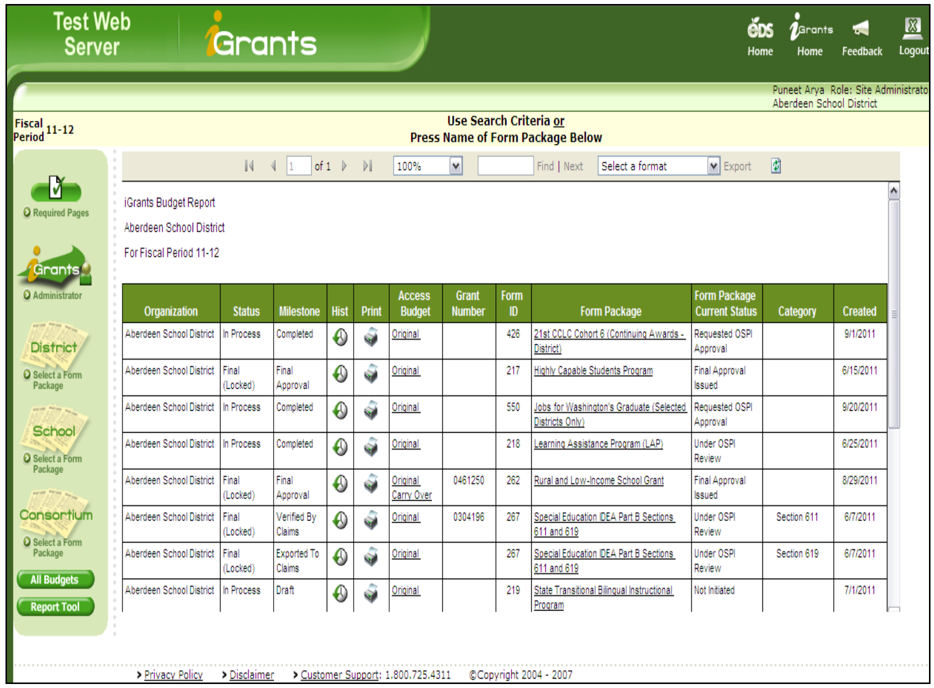
If you have **questions regarding claims,** please do *not* contact iGrants. Contact the fiscal person listed on the profile page for that particular form package.

OSPI Grants Management/Claims

Holly Hill (360) 725-6281 holly.hill@k12.wa.us
Michelle Sartain (360) 725-6282 michelle.sartain@k12.wa.us

6. All Budgets Report

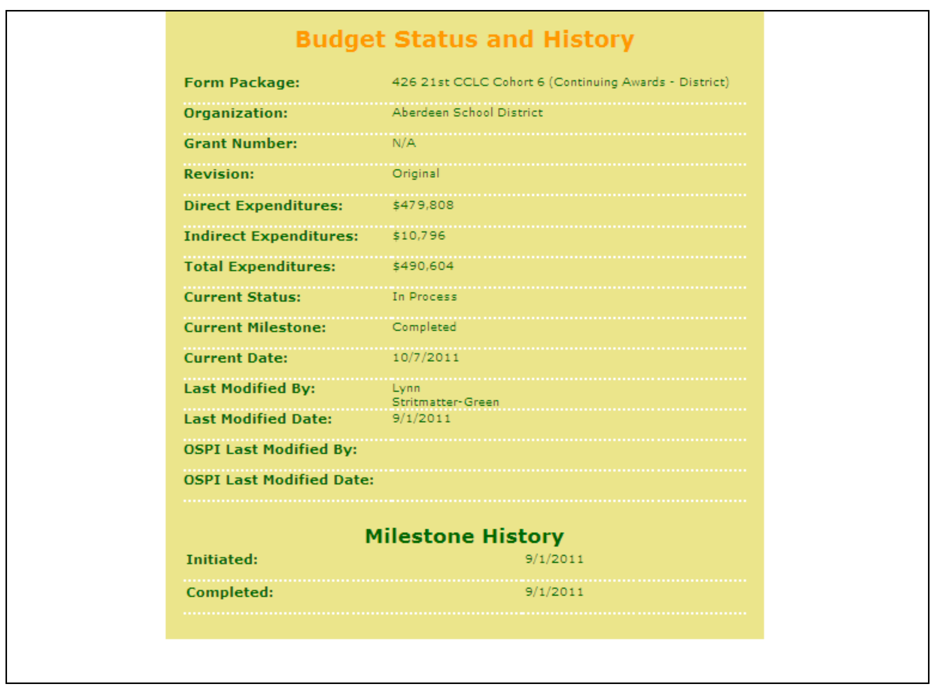
1. Clicking the **All Budgets** button in the left-hand navigation bar displays the **iGrants Budget Report** page with links to all budgets.



Notes:

- The **Budget Report** page displays budgets for current fiscal period only.
- Click the icon to view the budget status and history.
- Click the icon to print.
- Click **Access Budget** link or the form package name to view the budget.

2. Clicking the icon on the Budget Report page displays the **Budget Status and History** page in a new window.



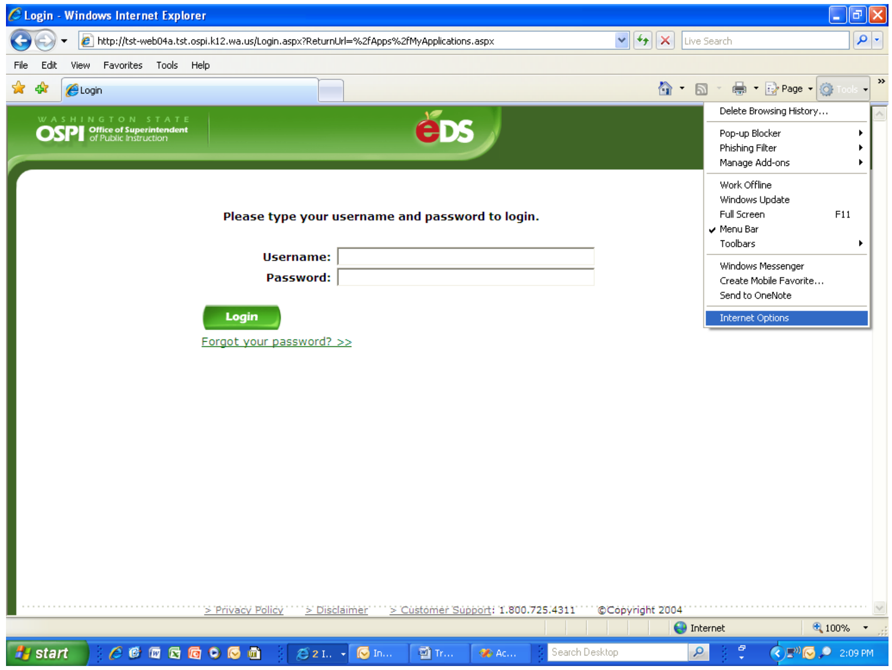
7. Report Tool

The Report tool is used to generate and print a report. Currently, clicking the **Report Tool** icon in the left-hand navigation bar takes you back to the **Form Package Selector** page (see section 2.3) where you can search and print the form package data.

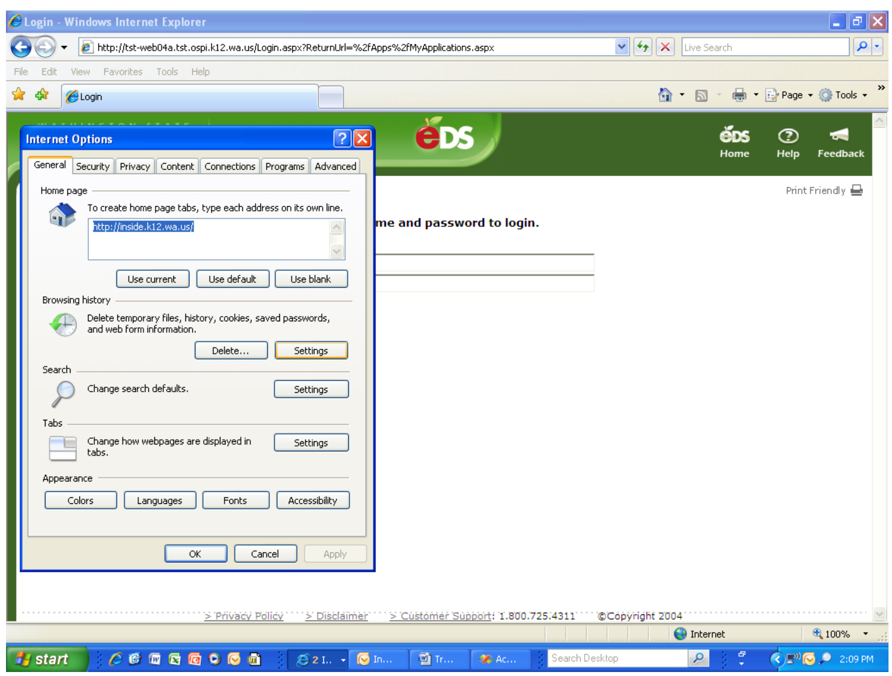
Note: iGrants is working on a future enhancement that will enable districts to run form package reports and download as Excel documents. This section of the user manual will be updated with instructions on how that works once the enhancement is in place.

Appendix A – Adjusting the Browser Settings

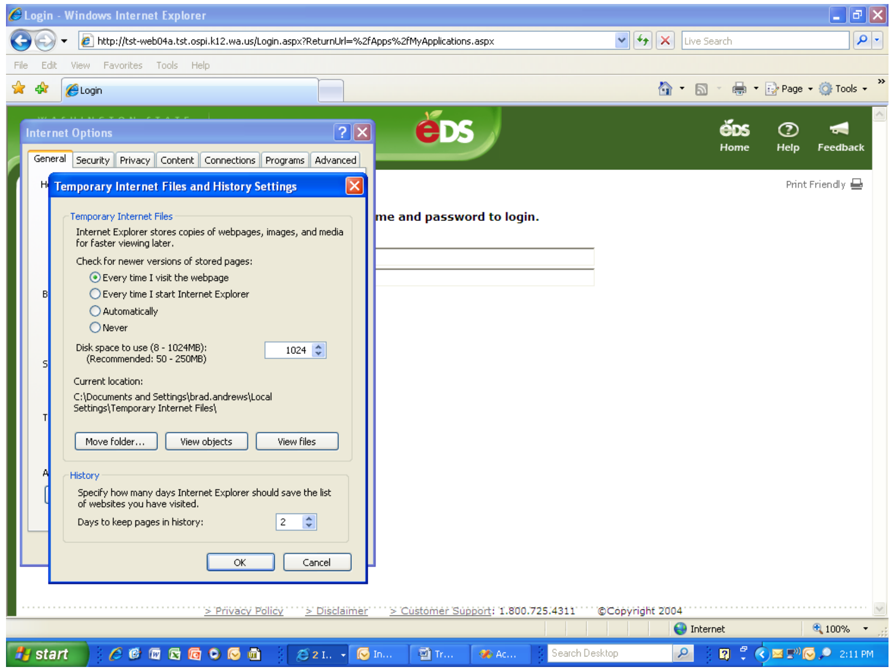
1. To ensure that screens and reports display correctly, use Internet Explorer (IE) as your Web browser. You may need to adjust the browser settings for IE. In the top right-hand corner of the browser window, click on the Tools icon. In the drop-down list that displays, select **Internet Options.**



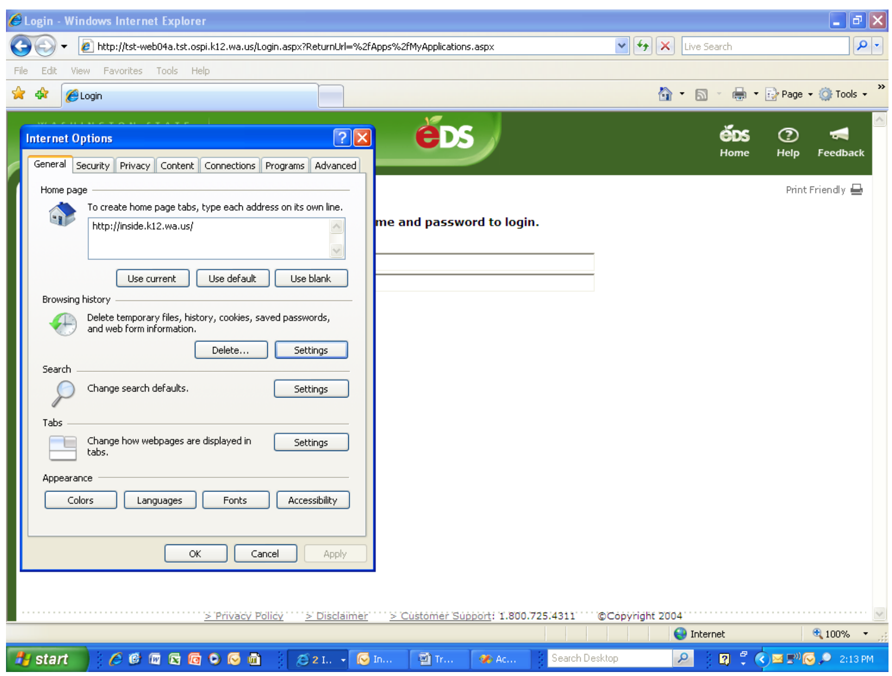
2. A window will display with Internet Options. On the **General** tab, under the heading Browsing history click the **Settings** button.



3. Another window will display with Temporary Internet Files and History Settings. Under the heading **Temporary Internet Files**, select the first radio button that says **Every time I visit the webpage.** Click OK.



4. This window will close and the Internet Options window will display. **Click OK again** to close this window.
5. Your browser settings are now adjusted and will **remain the default** each time you open the IE browser.



Appendix B – Track Changes

Purpose

The iGrants track changes enhancement addresses the need to identify changes to a form package after it was copied from prior fiscal period or OSPI has returned it to an applicant organization for changes.

How It Works

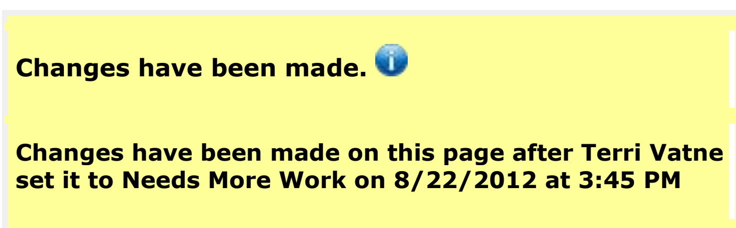
When pre-determined milestones occur (e.g., “Needs More Work” during initial review or “Unlock Page” for post-approval changes), a snapshot is taken of the values on each page where the milestone occurs. If a change is made to a value on a page with such a snapshot, a banner will display at the top of the page, and a message or button will appear directly below each changed value.

For example, when form package data is copied over from a previous fiscal period, snapshots are taken of every page in the form package. Any changes made prior to submission will be displayed as explained in the examples below.

Event: A school district revises values on a page which has a snapshot.

Track Changes Response: A banner displays at the top of the page which reads, “Changes have been made.”

Clicking the blue “I” will display more information about the snapshot as illustrated below:



Note: In general, a button or message appears directly below each changed value. The following examples explain what to expect for each type of data field.

Numerical Field: A View Changes toggle button appears.

Clicking the View Changes button will open a box displaying the field with deleted and added numbers highlighted. Deleted number is highlighted in red. Added number is highlighted in green.

Example:

Female	Male
1	1
Hide Changes	Hide Changes
01	01

After reviewing the changes, clicking on Hide Changes button will collapse the track changes display.

Text Box: A View Changes toggle button appears.

Clicking the View Changes button will open a box displaying the text with deleted and added text highlighted. Deleted text is highlighted in red. Added text is highlighted in green.

Example: There are presently currently 227 8th grade students at Miller Junior High.

After reviewing the changes, click the Hide Changes button to collapse the track changes display.

Radio Button: A message appears indicating the former response.

Example:

Have 50 percent of your teachers been trained? Yes No

Changed from Yes

Drop Down: A message appears indicating the former response.

Example:

Yes

Changed from No

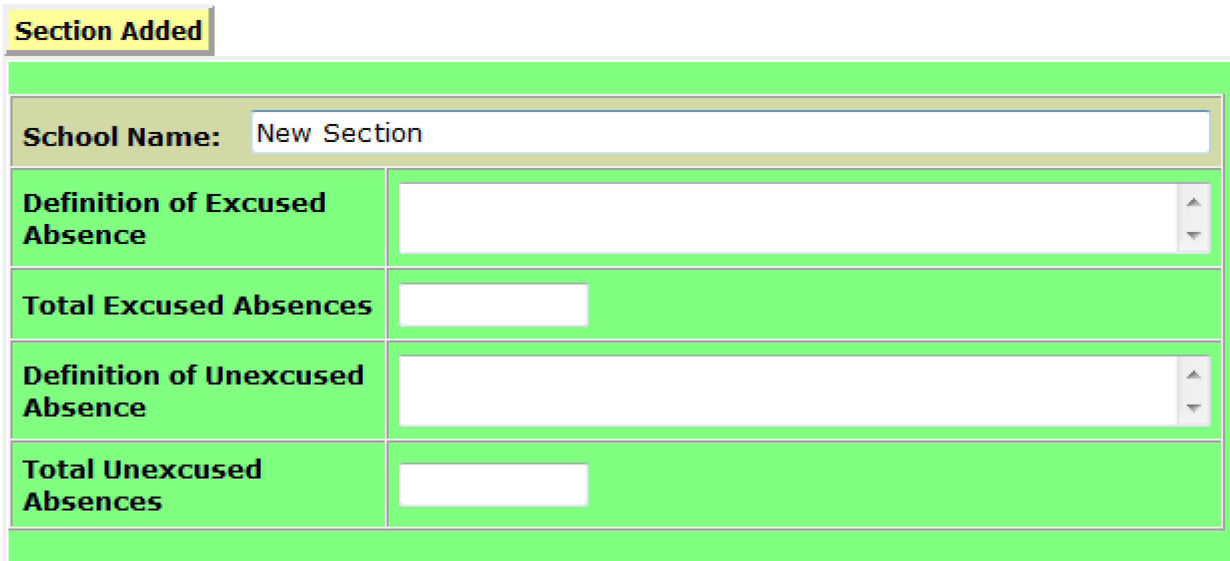
Check Box: The message "Changed" appears, meaning if it's checked now, it wasn't before, and vice versa.

Example:

Option #1

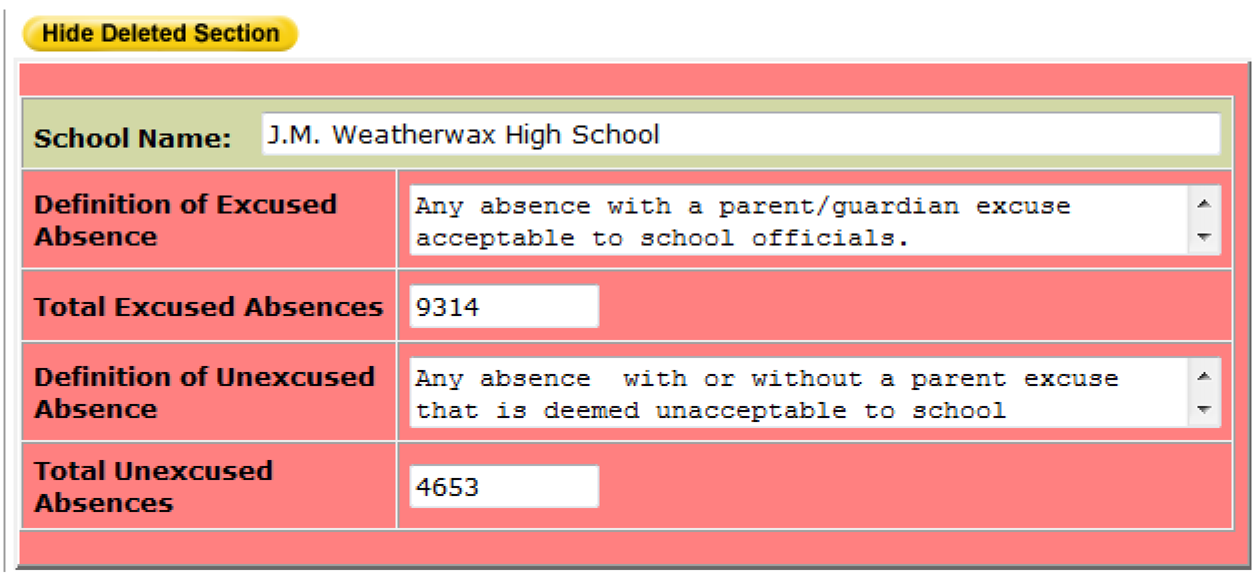
Changed

“New” Section Added: The message “Section Added” appears. The added section is highlighted in green.



“New” Section Deleted: The Show Deleted Section toggle button appears.

Clicking the Show Deleted Section button will display the deleted section highlighted in red. The button changes to Hide Deleted Section.



Snapshots Deleted:

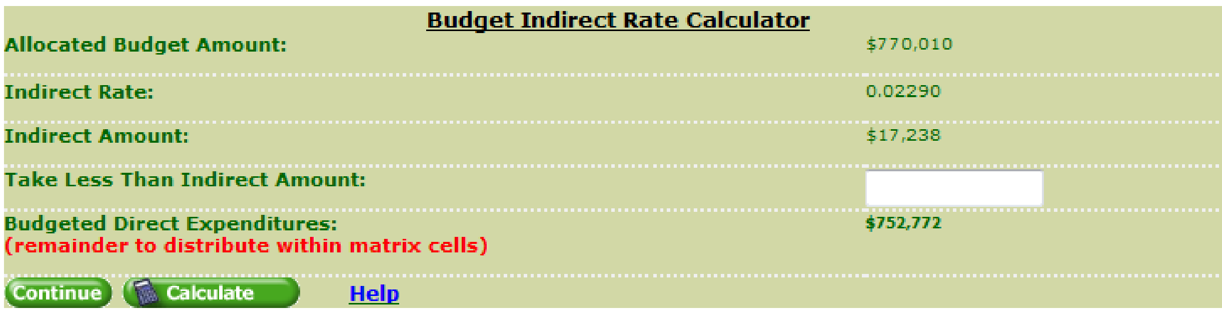
Event: An OSPI Program Manager Approves a page.

Track Changes Response: The snapshot of the page is deleted if a snapshot existed. All track changes buttons and banners disappear.

Note: Track changes buttons and banners will not show up on a printed copy of a page.

Appendix C – Budget Overview

Understanding the Budget Calculator



The Math: Budgeted Direct Expenditures + Indirect = Total Allocation Amount

- The **Allocated Budget Amount** will be either hard-coded, if allocation is uploaded – as shown in illustration – or there will be an open field for manual entry.
- The **Indirect Rate** reflects the indirect rate type (determined by OSPI program managers) and is based on indirect rates posted annually to iGrants.
- There is an open field for taking ***less than*** the indirect amount allowed. This field is optional and should be ignored if taking the entire indirect amount. If taking less than the posted indirect amount, click **Calculate** after entering the lesser amount to determine the budgeted direct expenditures amount.
- **Budgeted Direct Expenditures** are calculated based on amounts displayed in calculator.
- Press **Continue** to display full budget matrix.
- Insert dollar amounts in desired fields and **Save.**
- Click the 

 icon to display a check mark on the budget tab.

*Note: If, at any stage, an error message comes up, you must correct the error before the system will let you continue. If you exit the budget before satisfying the error message, your changes will not be saved.

Processing Steps

- Once the budget and form pages are complete, click the **Finish** and **Notify** buttons to submit the form package for internal review.
- The district iGrants Administrator will submit the form package for OSPI review.
- After the form package has been approved, subsequent changes to the budget will be processed by creating a budget revision. Steps explaining the **Create Revision** process follow.

Budget Revisions

- Open the last budget that was approved.
- Click on the 

 icon. This will take you to the budget calculator (described above).
- Click **Continue** to access a new budget where you will manually shift dollar amounts to the desired objects and activities.
- **Save**. (This step calculates the budget matrix.)
- Mark the budget complete to display the check mark in the budget tab.
- Click the 

 icon, and send the email to notify OSPI.

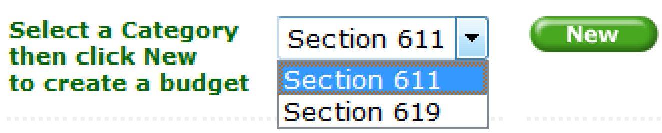
*Note: If, at any stage, an error message comes up, you must correct the error before the system will let you continue. If you exit the budget before satisfying the error message, your changes will not be saved.

Exceptions

Budget Categories

In some cases, multiple budgets are allowed for a single application. The example below shows two original budgets for FP 267: 1) one for Section 611 and 2) one for Section 619. Having two separate budgets allows for each funding source to be tracked independently.

When more than one budget category is available, select from the drop-down list *before* clicking the New button, and follow the budget processing steps described above. To create another budget, simply select the other option from the drop-down and follow the steps outlined above.



Two original budgets with different budget categories will display like this.

Terri Vatne Role:
Aberdeen School

267 Special Education IDEA Part B Sections 611 and 619
Current Form Package Status: **Under OSPI Review**

Help | Begin Review | Contact | Application | Budget | Approval | Notes

Status	Milestone	Hist.	Print	Access Budget	Grant Number	Form ID	Form Package	Category	Created	Total
In Process	Completed			Original		267	Special Education IDEA Part B Sections 611 and 619	Section 611	06/21/2012	$770,010
In Process	Completed			Original		267	Special Education IDEA Part B Sections 611 and 619	Section 619	06/21/2012	$41,486

Appendix D – Hide/Unhide Feature

Overview

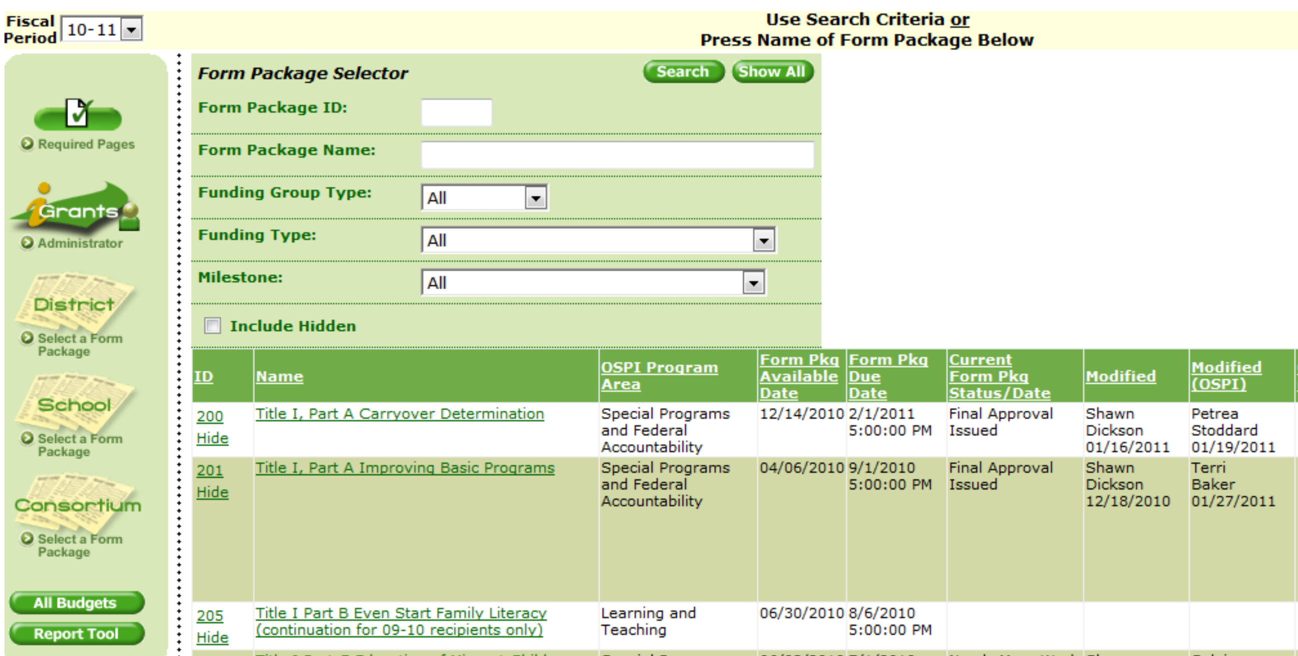
Screenshot #1 shows a partial district list of form packages. Notice the "Hide" link below each form package number. Notice FP 200 on the list.

Screenshot #2 shows the same district list after clicking on the "Hide" link for FP 200.

Screenshot #3 shows the "Include Hidden" box checked, which is what you would do, followed by clicking on the "Search" button to bring up the entire list, including those hidden. Notice how FP 200 again shows up on the list, now displaying an "Unhide" link below the form package number.

If you wanted FP 200 to display permanently on the list, you would now click the "Unhide" link (see **Screenshot #4**). If you do not click the "Unhide" link, FP 200 will remain hidden next time you login.

Screenshot #1



Screenshot #2

☐ **Include Hidden**

ID	Name	OSPI Program Area	Form Pkg Available Date	Form Pkg Due Date	Current Form Pkg Status/Date	Modified	Modified (OSPI)
201 Hide	Title I, Part A Improving Basic Programs	Special Programs and Federal Accountability	04/06/2010	9/1/2010 5:00:00 PM	Final Approval Issued	Shawn Dickson 12/18/2010	Terri Baker 01/27/2011
205 Hide	Title I Part B Even Start Family Literacy (continuation for 09-10 recipients only)	Learning and Teaching	06/30/2010	8/6/2010 5:00:00 PM			
206 Hide	Title I Part C Education of Migrant Children	Special Programs and Federal Accountability	06/03/2010	7/1/2010 5:00:00 PM	Needs More Work	Shawn Dickson 12/31/2010	Sylvia Reyna 02/15/2011

Screenshot #3

☑ **Include Hidden**

ID	Name	OSPI Program Area	Form Pkg Available Date	Form Pkg Due Date	Current Form Pkg Status/Date	Modified	Modified (OSPI)
200 Unhide	Title I, Part A Carryover Determination	Special Programs and Federal Accountability	12/14/2010	2/1/2011 5:00:00 PM	Final Approval Issued	Shawn Dickson 01/16/2011	Petrea Stoddard 01/19/2011
201 Hide	Title I, Part A Improving Basic Programs	Special Programs and Federal Accountability	04/06/2010	9/1/2010 5:00:00 PM	Final Approval Issued	Shawn Dickson 12/18/2010	Terri Baker 01/27/2011
205 Hide	Title I Part B Even Start Family Literacy (continuation for 09-10 recipients only)	Learning and Teaching	06/30/2010	8/6/2010 5:00:00 PM			
206 Hide	Title I Part C Education of Migrant Children	Special Programs and Federal Accountability	06/03/2010	7/1/2010 5:00:00 PM	Needs More Work	Shawn Dickson 12/31/2010	Sylvia Reyna 02/15/2011

Screenshot #4

☐ **Include Hidden**

ID	Name	OSPI Program Area	Form Pkg Available Date	Form Pkg Due Date	Current Form Pkg Status/Date	Modified	Modified (OSPI)
200 Hide	Title I, Part A Carryover Determination	Special Programs and Federal Accountability	12/14/2010	2/1/2011 5:00:00 PM	Final Approval Issued	Shawn Dickson 01/16/2011	Petrea Stoddard 01/19/2011
201 Hide	Title I, Part A Improving Basic Programs	Special Programs and Federal Accountability	04/06/2010	9/1/2010 5:00:00 PM	Final Approval Issued	Shawn Dickson 12/18/2010	Terri Baker 01/27/2011
205 Hide	Title I Part B Even Start Family Literacy (continuation for 09-10 recipients only)	Learning and Teaching	06/30/2010	8/6/2010 5:00:00 PM			
206 Hide	Title I Part C Education of Migrant Children	Special Programs and Federal Accountability	06/03/2010	7/1/2010 5:00:00 PM	Needs More Work	Shawn Dickson 12/31/2010	Sylvia Reyna 02/15/2011