



TN Grants

Applicant User Guide Version 3.0

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1. System Requirements

TN Grants was designed so that the vast majority of computer users will be able to use the system with little or no changes to their computer environment. The four requirements that are mentioned below are common computer elements that should be already present on most machines.

1.a. Operating System

TN GRANTS was designed for both of the two most common computer operating systems - Windows and Macintosh. It has not been tested and is not supported on other operating systems such as Linux and Unix. Users accessing the system from a Macintosh environment are required to have MacOS 7.5 or higher running on a PowerPC processor. Windows users are required to have an operating system that is Windows 95 or higher.

1.b. World Wide Web Connection

TN GRANTS is an Internet application. It is accessed via the Internet and was specifically designed for Internet usage. The Internet is the more general term that is typically used to refer to the World Wide Web. The World Wide Web consists of a vast array of content that is accessible via a web browser. For the purpose of accessing TN GRANTS, the standard Internet connection is via a modem connection. A modem is a piece of hardware that connects to the computer to send data through a phone line to and from the computer. Internet connections that are "faster" than a modem connection, such as cable and DSL, will improve the speed at which the system operates, but are not necessary in order to use the system. If you are in an office environment, you may already have an Internet connection, but if you are unsure, please contact your organization's network administrator.

For those using a dial-up connection over a modem, it is highly recommended that you have a modem connection speed of at least 33.6 kbps (kilobits per second).

1.c. Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer, Firefox, Safari, and Opera.

1.d. Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The system will automatically generate grant documents in PDF format using information that has been saved into the various narrative and budget pages. Using Adobe Acrobat Reader you may choose to view, print, or save these documents. If you do not have Adobe Acrobat Reader you can go to [Adobe](http://www.adobe.com) and download Acrobat Reader free.

2. TN Grants System Homepage

To access TN GRANTS, type "www.TNGHSOGrants.org" in your web browser and press "Enter." The page you see should look like the image shown below.

The screenshot shows the TN Grants System Homepage. At the top, there is a banner with a map of Tennessee on the left containing the state flag, and the text "TN Grants" in large white letters on the right. Below the banner is a dark blue horizontal bar with a "System Login" button on the left. The main content area has a light blue background with a faint image of a person's hands typing on a laptop. On the left side of the main area, there is a welcome message, a link to the Governor's Highway Safety Office website, and instructions for new users. On the right side, there is a "Login" box with fields for "Username" and "Password", a "LOGIN" button, and links for "New User?" and "Forgot Password?". At the bottom, there is a footer with "Powered by IntelliGrants™" on the left and "© Copyright 2000-2010 Agate Software, Inc." on the right.

System Login

Welcome to TN Grants, the online grants management system of the TN Governor's Highway Safety Office. This is where you will apply for future funding opportunities and manage current highway safety projects. (Status reports, claims, etc.)

For more information about the Governor's Highway Safety Office, please visit <http://tntrafficsafety.org>

If you are new to TN Grants, please register with the system. Just click on "New User" at the top right corner of your screen or click [here](#) (link to new user screen). You will be notified by email once you have been approved. The average wait is less than 2 days. Once you have registered, you have the ability to access online help, which features both print and video assistance.

Should you have any questions about TN Grants forms, please contact your GHSO Program Manager directly. For a full list of contacts, [click here](#).

We look forward to working with you to improve the safety of our Tennessee highways.

Login

Username

Password

LOGIN

[New User?](#)

[Forgot Password?](#)

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3. Applicant user types

There are four security roles defined for TN GRANTS users: Project Director, Agency Staff, Fiscal Director, and Grant Writer. These roles have different security access to work on the applications. Once the Project Director's new user account is created, the Project Director may select and enter their own organization's staff names to access TN GRANTS. The organization's staff entered by the Project Director will be assigned to Agency Staff, Fiscal Director, or Grant Writer security level role. Each security role is summarized below:

Project Director will be able to:

- Add, edit, and delete user account information for Project Director, Agency Staff, Fiscal Director, and Grant Writer
- Initiate available grants
- Enter, update, and delete information on applications
- Download and attach files to the application
- Cancel an entire application before submission
- Submit applications to TN GRANTS
- Modify applications within the status of Modifications Required
- Check on the status of each application

Agency Staff, Fiscal Director, and Grant Writer will be able to:

- Enter, update, and delete information on applications
- Download and attach files to the applications
- Modify applications with status of Modifications Required
- Check on the status of applications

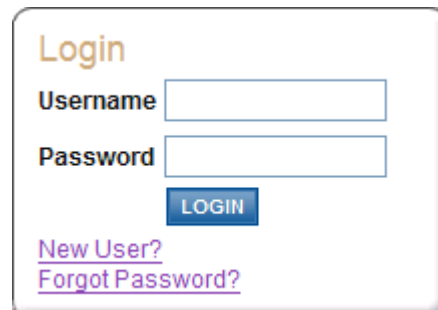
Security Roles	Control Access to Organization	Control Access to Grant	Read	Write	Initiate Grant	Submit Grant	Cancel Grant
Project Director	X	X	X	X	X	X	X
Agency Staff			X	X			
Fiscal Director			X	X			
Grant Writer			X	X			

4. Gaining access to TN GRANTS

In order to use the system you must be granted access. If no one in your organization has access to TN Grants, the first user must create a new user account and be approved by TN Grants staff. Subsequent users for your organization may be added by the existing Project Directors.

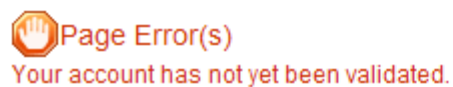
To create a new user account:

- 6) From the TN GRANTS homepage click the "New User?" link located in the "Login" section.
- 7) Complete the user form.
 - a) Fill in all information as required. All items marked with an '*' are required to create your account.
 - b) The "Username" field must consist of only letters and numbers, 5 to 20 characters long.
 - c) The "Password" field must consist of only letters and numbers, 7 to 20 characters long.
 - d) The fields "Password" and "Confirm Password" must be the same.
 - e) Complete the page, including Organization and title.



NOTE: Once the user has created a user account and gained access to the system, they will never have to request access again.

Having saved your contact information, your account must then be approved by an administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a system administrator you will receive the following message:



Page Error(s)
Your account has not yet been validated.

When access has been granted to you by a system administrator you will receive an email message confirming that your account has been validated.

4.a. Adding users to your organization

- 1) The Project Director must first login to the system.
- 2) From the Main Menu, click the My Organization(s) link on the menu bar.



- (a) Click the name of the organization you would like to add this new user to. (Some Project Directors may be members of multiple organizations. Each organization would be listed here. Simply click the name of the organization you wish to add this new user to.)

- (b) You are now on the Organization page. Click the "Organization Members" link above the Organization Information section.



- (2) Click the Add Members tab above the Organization Members list. By default the "Current Members" tab will be active and below it will be listed the various members of the Organization. If the person whose account must be added is not shown, click the "Add Members" link.

Organization - Iris Test

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#) |
 [Organization Accounts](#)


Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input checked="" type="checkbox"/> Nash, Iris	Project Director	9/7/2012 -	15	Tkaczyk, Mr. Joshua 9/7/2012	

- (3) After clicking the "Add Members" tab, the Project Director should first search for the person that he or she wishes to add by typing in part of the user's name into the "Person Search" box and then by clicking the "Search" button.

 [Back](#)

Organization - Iris Test

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#) |
 [Organization Accounts](#)


Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

Person Search

- (4) If the user exists he or she will be shown below the search box. The "Selected" checkbox should be checked and the user should be assigned a role and a start date within the agency. Finally, the "Save" button must be clicked in order to add the user.

 [Back](#)

Organization - Iris Test

Follow the instructions listed below to add/remove/modify organization members.

[Organization Information](#) |
 [Organization Members](#) |
 [Organization Documents](#) |
 [Organization Details](#) |
 [Organization Accounts](#)

Organization Members

Administrators with the authority to add members to your organization can follow these steps:
 To add a member to your organization, select the **Add Members** link below.
 If a member has already added his/her information in the system, you can search for the member.
 If you need to add a member's information into the system, select **New Member**.
 For more detailed instructions, select the **Show Help** button above.

[Current Members](#) |
 [Add Members](#)

Person Search

<input type="checkbox"/>	Person	Role	Active Dates	Active Documents	Assigned By	Modified By
<input type="checkbox"/>	Reviewer, Moe	Agency Staff	1/9/2013 -			

- (5) If no users were found that matched the search criteria:

- Click the "New Member" button.
- Enter the basic demographic information for the new user.
- Click the "Save & Add To Organization" button.

NOTE: Users not linked to an organization cannot access any grant information.


5. Keeping contact information current

In order to receive continued funding or to enter into new grant agreements, it is important that your contact information be as up-to-date as possible. This is done very quickly and easily in TN GRANTS. By keeping your user record and agency record current with all of the latest changes, TN GRANTS staff will be able to contact you appropriately when the need arises.

5.a. Updating your user record

You may update your user record at any time by following these steps:



- (1) Click the "My Profile" link on the menu bar on the Main Menu.

 [Back](#)

My Profile

Please complete all the required fields below. Required fields are marked with an *.

Contact Information

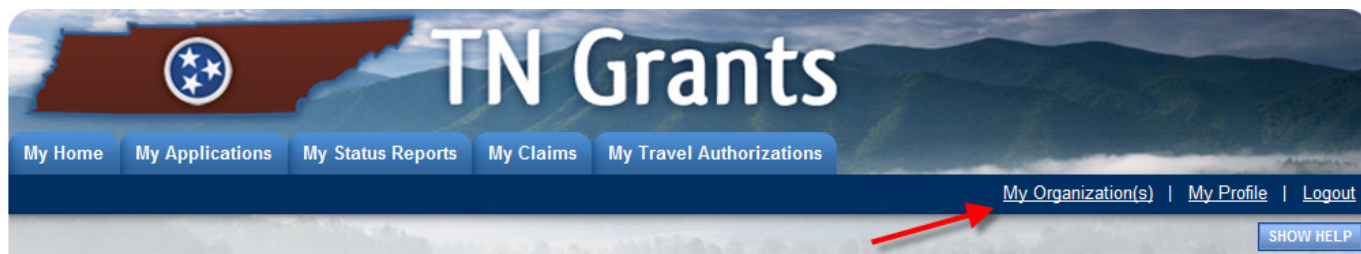
	Prefix	First	Middle	Last	Suffix
Name	<input type="text" value="v"/>	<input type="text" value="Iris"/> *	<input type="text"/>	<input type="text" value="Nash"/> *	<input type="text" value="v"/>
Display Name	<input type="text"/>				
Organization	<input type="text"/> *				
Title	<input type="text"/>				
Address	<input type="text" value="1234"/>   *				
City	<input type="text" value="Nashville"/> *	State	<input type="text" value="Tennessee"/> *	Zipcode	<input type="text" value="12345"/> *
County	<input type="text" value="Franklin County"/> *				
Phone #1	<input type="text" value="(123) 123-1234"/> *		Phone #2	<input type="text"/>	
Fax	<input type="text"/>		Cell Phone	<input type="text"/>	
Email	<input type="text" value="jmeade@agatesoftware.com"/> *				
Website	<input type="text"/>				
Username	<input type="text" value="IrisNash"/> *				
Password	<input type="text"/> *		Confirm Password	<input type="text"/> *	

- (2) Update the form and click the "Save" button.

5.b. Updating another user's contact record

If you are the Project Director for your organization you may edit the contact information for others in your organization by following these steps:

- 1) Click on the "My Organization" link on the menu bar and then click on the organization whose member you would like to edit. Click on the "Organization Members" link.



(2) page.



(3) Click the name of the person whose contact information you want to change.

(4) Update the form accordingly and click the "Save" button.

NOTE: A Project Director may not change the contact information of another Project Director. If a Project Director were to click on another Project Director's name, they would receive an email prompt instead of seeing their contact information.

5.c. Updating the information for your agency

Although it doesn't occur frequently, when your organization's contact information changes it is important to update that information in the system by following these steps:

- 1) Click the "My Organization" link on the menu bar.
- 2) Click on the Organization that you would like to edit.
- 3) Update the form accordingly and click the "Save" button.

5.d. Deactivating a user in the Organization

A Project Director from an organization may choose to deactivate a member of the organization. A deactivated user will not be able to edit application related information for your organization. You may deactivate a member of your organization by following these steps:

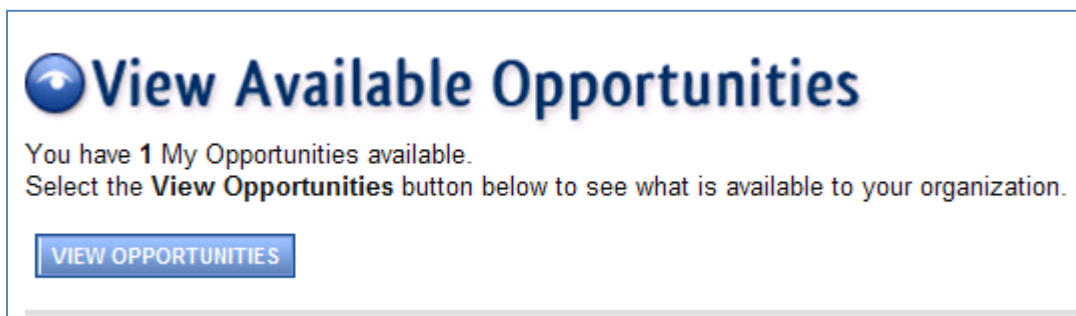
- 1) Click the "My Organization" link on the menu bar.
- 2) Click the name of the organization whose member you would like to deactivate.
- 3) Click on the Organization Members tab.
- 4) Change the second active date in the system to a date in the past for the user requiring deactivation and then click the "Save" button.

1/1/2008	-	1/1/2008
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6. Initiate an Application

The Project Director security role is permitted to initiate applications. In order to create an application, please follow these steps:

From the Main Menu, click the "View Opportunities" button under the "View Available Opportunities" section on the main menu. This section will show you all of the grant program types where you may apply for a new grant.



For those grant programs where you are eligible to submit a new application you will see a "Apply Now" button under the description of the grant. Click the "Apply Now" button.

APPLY NOW

A confirmation page will appear asking for confirmation. By clicking the "I Agree" button you accept the conditions outlined in the RFA. An application will be created and you will be taken to the "Application Menu" where you can begin filling out the pages.

Agreement

Please make a selection below to continue.

Grant funding is provided the NHTSA and administered by the Governor's Highway Safety Office. Grant funds shall be used only for behavioral traffic safety issues. The GHSO does not guarantee funding levels. Our funding level may change by the time applications are awarded. Agencies will be notified of any changes.

Are you sure you wish to apply for a grant with the Governor's Highway Safety Office?

I AGREE

I DO NOT AGREE

The document information will be displayed at the top of the Application Menu.

Application Menu

Document Information: [GHSO-2013-IrisTest-00029](#)

 [Details](#)


Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application	Iris Test	Project Director	Application In Process	09/01/2012 - N/A 10/01/2020 11:59PM EST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

VIEW FORMS

Following the creation of an application, a new task for that document will be under the “View My Tasks” section on the main menu. When logging into TN GRANTS, click the “Open My Tasks” button to return to any application previously initiated.

 **My Tasks**

Export Results to Screen Sort by: -- Select -- GO

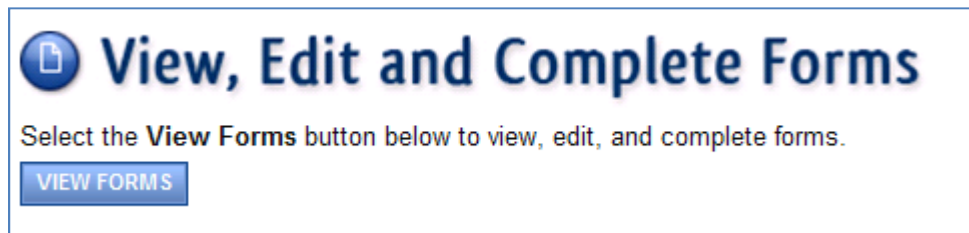
Info	Document Type	Organization	Name	Current Status	Date Received	Date Due
	Application	Iris Test	GHSO-2013-IrisTest-00006	Application In Process	10/18/2012	10/1/2020
	Application	Iris Test	GHSO-2013-IrisTest-00007	Modification Requested	11/6/2012	10/1/2020
	Application	Iris Test	GHSO-2013-IrisTest-00029	Application In Process	1/9/2013	10/1/2020
	Application	Iris Test	GHSO-2008-IrisTest-00028	Grant Awarded	12/28/2012	
	EDISON Information	Iris Test	ED-2013-IrisTest-00001	Initiate Document	10/17/2012	

7. The Application Menu

The Application Menu is organized into various sections that help to organize the tasks and information. These sections are described below.

7.a. View, Edit and Complete Forms

The Forms section is where the vast majority of the work in an application is completed. This section contains all of the forms to be completed prior to the application being submitted. To edit application forms simply click "View Forms" and then click on the name of the form you wish to edit.



[Back](#)

Application Menu - Forms

Please complete all required forms below.

Document Information: [GHSO-2013-IrisTest-00029](#)

[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
Application				
	Contact and Project Information			
	Problem Statement			
	Goals and Objectives			
	Interventions			
	Resources			
	Schedule of Tasks			
	Method of Evaluation			
	Self-Sufficiency Plan			
Budget				
	Personnel			
	Professional Fees			
	Supplies			
	Travel, Meetings & Conferences			
	Other Non-Personnel			
	Insurance			
	Equipment			
	Indirect Cost and Revenue Source			

7.b. Change the Status

The “Change the Status” section allows a Project Director the ability to submit applications or push the application to the next status level. Click the “View Status Options” button to see what status push options you currently have available to you.

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

VIEW STATUS OPTIONS

Possible Statuses

APPLICATION CANCELLED

APPLY STATUS

APPLICATION SUBMITTED

APPLY STATUS

7.c. Management Tools Section

The Management Tools section allows certain administrative responsibilities such as the ability to add/edit people from the application and view the status history of the application. Tools are available based on the security role of the person logged in.

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Management Tools



CREATE FULL PRINT VERSION

Select the link above to create a printable version of the document.



CREATE FULL BLANK PRINT VERSION

Select the link above to create a blank printable version of the document.



ADD/EDIT ORGANIZATIONS

Select the link above to manage the organizations associated with this document.



ADD/EDIT PEOPLE

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.



STATUS HISTORY

Select the link above to view the status history of this document.



CHECK FOR ERRORS

Select the link above to check the entire document for errors.



PROCESS FLOW SNAPSHOT

Select the link above to view the details of the current and next possible status for this document.



VIEW MODIFICATION HISTORY

Select the link above to view various modifications that people have made to specific pages in the document.



MANAGE REVIEW PROCESS

Select the link above to view review information for the document.



ATTACHMENT REPOSITORY

Select the link above to view all attachments in this document.

7.d. Claims / Status Reports / Travel Authorizations

The Claims/Status Reports/Travel Authorizations (Related Items) section is where you will find items that are related to an application or grant. It is likely you will not have any related items until later in the grant cycle.

Claims / Status Reports / Travel Authorizations

Select the button below to view claims, status reports, and messages related to this application.

[VIEW CLAIMS / STATUS REPORTS / TRAVEL AUTHORIZATIONS](#)

8. Assigning Users to an application

The Project Director has administrative rights to add or remove other users to/from applications.

Any Project Director added to the application will also be automatically added to all corresponding related documents when each is created. New users to TN GRANTS will not be automatically added to existing applications. However, any user may be manually added to the application throughout the entire application completion process.

8.a. Assign User Access to Application

- 1) To add users to an application, click on the application of choice in the "My Tasks" Section on the Main Menu.
- 2) Click the "View Management Tools" button and choose the Add/Edit People link.

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

[ADD/EDIT PEOPLE](#)

Select the link above to perform actions such as adding people, changing a security role, or altering people's active dates on this document.


- 3) Type in the name of the individual in the search criteria box and click the "Search" button.
- 4) From the search results, select the person, give him/her a security role and fill in the access date you would like this individual to access the application.

Person Search

Enter a name or partial name:

[SEARCH](#)

People Found

<input type="checkbox"/> Person	Organization(s)	Role	Active Dates	Assigned By
<input type="checkbox"/> Moe Reviewer Email	Reviewers Inc	Agency Staff 	1/9/2013 - <input type="text"/>	

8.b. Remove User Access to Application

There are two ways to remove a user's access to an application. To remove a user's access to an application, on the application menu click the "View Management Tools" button and then choose the "Add/Edit People" link.

- 1) Edit the access start and/or end date for the user.

1/9/2013 - 1/17/2013

Or

- (2) For the desired user, in the "Selected" column, disable (uncheck) and save the page. The user will be removed from the application.

Person Search

Enter a name or partial name:

Current People Assigned

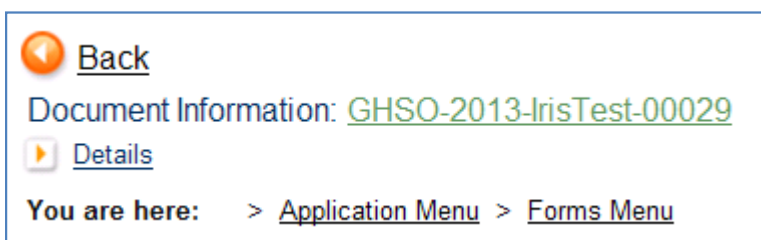
<input type="checkbox"/>	Person	Organization(s)	Role	Active Dates	Assigned By
<input checked="" type="checkbox"/>	Iris Nash Email	Iris Test	Project Director	1/9/2013 - <input type="text"/>	Grant System
<input type="checkbox"/>	Moe Reviewer Email	Reviewers Inc	Grant Writer <input type="button" value="v"/>	1/9/2013 - 1/17/2013	Iris Nash

9. Application Form Completion

If you click on the "View Forms" button under "View, Edit and Complete Forms" on the Application Menu, the various pages of the application are displayed. These are the forms that must be completed before your application can be submitted. The following sections will lead you through the steps necessary for accomplishing that goal.

9.a. Forms Navigation

There are three basic methods for navigating through the forms of your application. You may either use the "Back" link at the top of any page within the application, the "You are here" links just below the "Back" link or you may use the Navigation Links at the bottom of the page.



By clicking the "Back" button, you will be taken back to the Forms menu and you can click on the next page you wish to complete. You do not have to complete the pages of the application in any particular order.

NOTE: Use the "Back" button in the system, not the back button on the browser.

The "Navigation Links" can be found at the bottom of the page. To access another page, click on the page name.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Contact and Project Information			
	Problem Statement			
	Goals and Objectives			
	Interventions			
	Resources			
	Schedule of Tasks			
	Method of Evaluation			
	Self-Sufficiency Plan			

9.b. Form Completion

When filling out an application form it is suggested that you first complete all of those fields for which you have information. Not everyone in each organization will have all of the information necessary to complete each form. Complete as much of it as you can and then click the "Save" button. Fields followed by red asterisks are required fields.

The screenshot shows a web form with the following elements:

- Navigation:** A "Back" button with a left arrow icon, a "Details" button with a magnifying glass icon, and a breadcrumb trail: "You are here: > Application Menu > Forms Menu".
- Title:** "Document Information: [GHSO-2013-IrisTest-00029](#)".
- Section Header:** "CONTACT AND PROJECT INFORMATION".
- Instructions:** "Instructions: Please fill in the appropriate fields. Required fields are marked with an asterisk*. When done, click the **SAVE** button."
- Form Fields:**
 - Project Title:** A text input field with a red asterisk.
 - Project Type:** A dropdown menu with a red asterisk.
 - Project Director:** A dropdown menu with a red asterisk.
 - Financial Officer:** A dropdown menu.
- Contact Information:** Labels for "Title:", "Phone:", "Fax:", and "Email:" are present for both the Project Director and Financial Officer, but no input fields are visible.
- Claim and Reporting Frequency:** Two radio buttons labeled "Monthly" and "Quarterly".

In the creation of some forms the "Add" button is used to create additional forms. Any form that has an "Add" button allows you to have multiple instances of that form. The following picture shows the available "Add" button on a page that multiple pages can be created.

The screenshot shows a horizontal bar with four buttons: "SAVE", "ADD", "ADD NOTE", and "CHECK GLOBAL ERRORS".

When multiple pages have been created for this particular form, you can choose between them. A dropdown will appear on the far right of the button toolbar.

[Back](#)
 Document Information: [AR-2012-UTDPS Test Org 1-00002](#)
 Parent Information: [HS-2012-UTDPS Test Org 1-00003](#)
[Details](#)
 Program Component: rdbActivity
 You are here: > [Activity Report Menu](#) > [Forms Menu](#) > Activity Reports

Meade 01/31/2012  

ENFORCEMENT REPORT

Instructions:

Required fields are marked with an *.
 Please complete this page and click SAVE.

Officer Name Badge Number Employee Number

When additional pages have been created, a number in parentheses will appear after the form name to indicate the number of pages connected with the particular link.

Navigation Links

Status	Page Name	Note	Created By	Last Modified By
	Performance Measures			
	Other Activities			
	Enforcement Report (2) 		UtahTest, ProjDirector 2/20/2012 12:17:51 PM	

9.c. Automatic Calculations

When possible, TN GRANTS will automatically perform calculations.

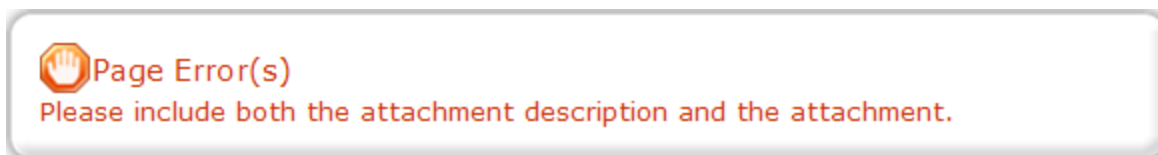
SUPPLIES

Instructions:
 Please fill in the appropriate fields.
 Required fields are marked with an asterisk*.
 When done, click the **SAVE** button.

Name	Classification	Cost	Quantity	Total
Paper Clips	Supplies	\$15.00	1	\$15.00
Total				\$15.00

9.d. Error Messages

If any required field is not completed within an application form or there are business rules violated, an error message will be displayed in red across the top of the page immediately after the Save button is clicked. During form completion it is not necessary to correct errors right away. You may return to the form at a later time and fix errors. If for some reason any errors remain and you attempt to submit the application, you will receive an error and TN GRANTS will require the errors to be fixed before the application submission is completed. See the example below.

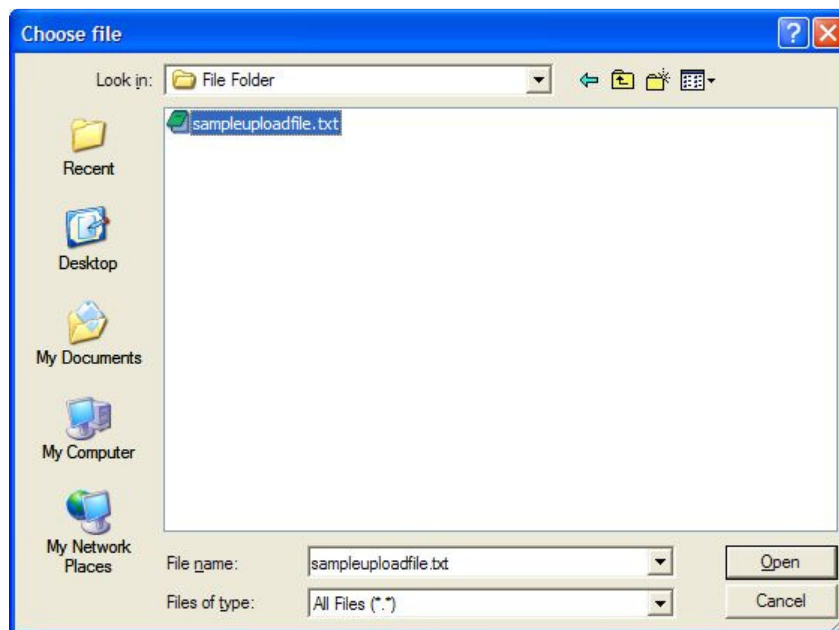


9.e. Uploads & Attachments

For some pages, form fields are not enough to capture the type of information that may be required. In those situations, a file upload field may be provided to allow you to upload a file instead. Files of the following types are allowed as uploads; doc, eps, pdf, jpg, gif, bmp, txt, avi, wmv, ppt, xls, mov, dpi, png, and mp3. To upload, click the "Browse" button.



Browse to the folder that contains the file you would like to upload and either double-click the file or click the file and then click the "Open" button.



After the page reloads, you must then click the page "Save" button to save the uploaded file.

9.f. PDF Version

In many pages a "Print Version" button will be available that will automatically create a PDF for you with the data that you provided for each form. These dynamic PDF's can be printed,

or saved to your computer for reference. It is a good practice to review the PDF files for accuracy prior to submitting the application electronically.

[PRINT VERSION](#)

9.g. Copy and Paste

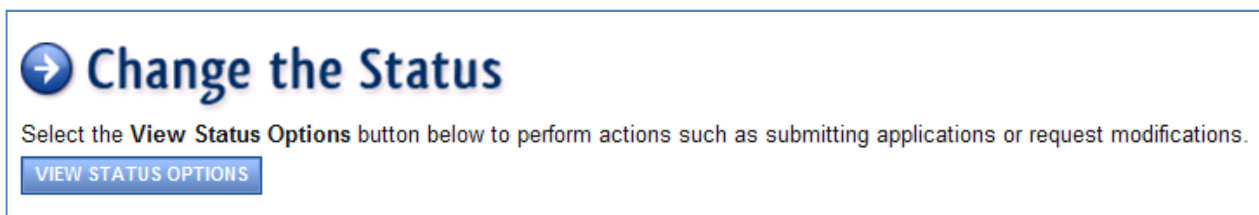
Applicants should be cautious while utilizing the copy and paste function of most word processing programs to transfer text into narrative boxes within TN GRANTS. TN GRANTS will not recognize certain formatting, including tables, graphs, photographs, bullets, and certain tabs. Applicants must also be aware of the character limits of each text box, as attempting to copy and paste text that is larger than the allotted amount of space will yield an error. The character limit may be found at the bottom left of each text box. Applicants may want to first copy and paste text into any standard “notepad” (or equivalent) program, which will have similar formatting to the text boxes in TN GRANTS. Copied text may appear correct on the screen but still cause an error when trying to print the page.

10. Submitting your Application

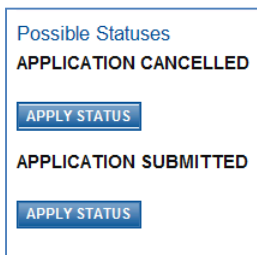
The Project Director security role is the only role authorized to submit an Application. When the application is believed to be complete and no more changes are required, the Project Directors may choose to submit.

It is important to note that once an application is submitted it will enter into a read-only status and cannot be changed!

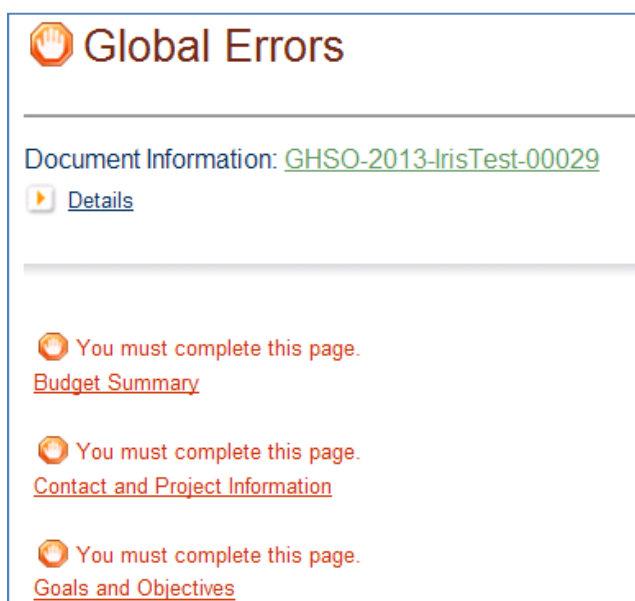
To submit, the Project Director must click the "View Status Options" button under the "Change the Status" header on the "Application Menu."



A list of the possible status changes will be shown on this page. Simply click the "Apply Status" button under the appropriate status change.



If any errors exist on any of the application's forms when the Project Director attempts to submit, they will receive an error message directing them to the form(s) with errors. All errors must be fixed before TN GRANTS will allow an application to be submitted. If no errors exist, the Project Director will be prompted to confirm his or her decision.

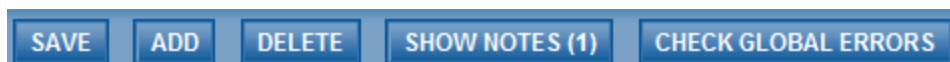


11. Notes

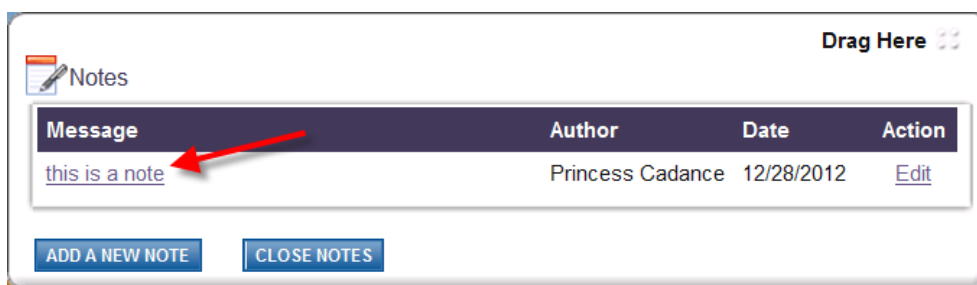
TN GRANTS allows for application forms to have notes attached to them. These notes may be used to communicate to other organization staff members or to TN GRANTS staff who are assigned to the application.

11.a. Adding and Editing Notes

- 1) Click on the "Add Note" or "Show Notes" button.



- 2) Any existing notes will be shown at the top of the new window.



- (a) Each note has the following information: message name, author, date, and action.
 - (b) By clicking on the message name, the note will expand showing the entire note's message.
 - (c) By clicking on either edit or reply under the action column, a note may either be edited (by the user who created the note) or replied (by another user).
- 3) To add a new note:
 - a) Click Add a New Note, type in the subject, message, and check the user(s) the note is meant for and click save.
- 4) Click the "Close Notes" button to close the notes Window.

It is important to remember that the author of the notes has the ability to determine who can and cannot see their note. Notes are an informal method of communication. Any text entered into a note will not be displayed on a PDF and will not be part of the review process.

12. Automatic e-mail notifications

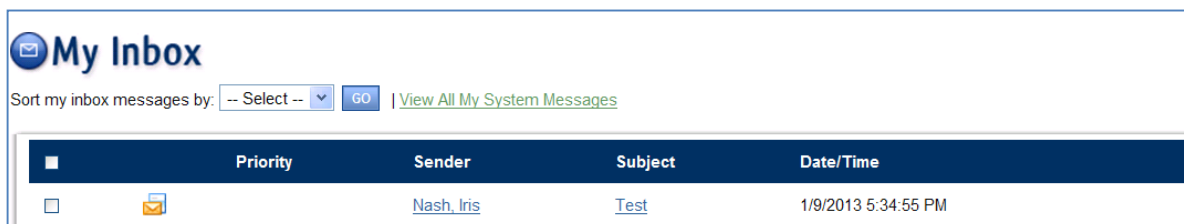
12.a. Automatic E-mail Notifications

Automatic email notifications may be sent to you periodically throughout the grant year. These messages will be sent via the system according to an automatic process or as the result of a user triggered event. These messages might accompany the submission of an application, an application being sent for modifications or a pending due-date that is approaching. These messages are intended to help you know what is occurring in the system that pertains to you or your organization. These messages may also be sent by TN GRANTS personnel. These messages are designed to help keep you up to date with the progress of your application while also serving as reminders when action is required on your part.

In order to receive these messages it is important that you include an active, frequently used email address when creating your contact record in the system. If you provide an incorrect email address or an address to an account that is either inactive or full, you will not be able to receive these important messages.

12.b. System Messages

In addition to the automatic email notifications, there is an area referred to as the System Messages that manages messages sent to you either from the system itself or from TN GRANTS personnel. You can view or edit your System Messages by following these steps:



Click the "Open My Inbox" button under the "View My Inbox" section on the main menu. You will now see any unread system messages. You may filter system messages by choosing an option from the drop down labeled "Sort my inbox messages by."

- a) Clicking the Subject of a message will take you to the message itself. You can read the message from that screen and then may perform any of the following actions:
 - (1) Click the "Reply" button to reply to the system message if allowed.
 - (2) Click the "Close" button to close the system message.
 - (3) Click the name of the sender to send an email to the sender of the message.

13. Application Modifications

Once applications reach Grant Awarded status, modifications can be requested. To start a modification, change the status of your application to Modification Requested.

Complete the Modification Request form.

Change the status to Modification Request Submitted.

14. Claims

14.a. Initiating a Claim

Monthly and quarterly claims will be automatically initiated. You will find them in My Tasks. Final claims can be initiated once a Grant is in the 'Grant Awarded' status.

2 Roles can initiate a claim. Users assigned these roles are the only users that can initiate a claim:

- Agency Staff
- Project Director

When navigating within the grant, from the 'Application Menu', select the "Claims/Status Reports/Travel Authorizations" menu at the bottom of the page (see below)

Application Menu

Document Information: [GHSO-2013-Iris_Test-SA-00008](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application	Iris_Test	Project Director	Grant Awarded	08/01/2012 - 11/30/2012 08/01/2020 12:00PM EST

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.
[VIEW FORMS](#)


Change the Status
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
[VIEW STATUS OPTIONS](#)

Access Management Tools
Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.
[VIEW MANAGEMENT TOOLS](#)

Claims / Status Reports / Travel Authorizations
Select the button below to view claims, status reports, and messages related to this application.
[VIEW CLAIMS / STATUS REPORTS / TRAVEL AUTHORIZATIONS](#)

This page appears where you can select Initiate a Final Claim. Click on the link.

Claims / Status Reports / Travel Authorizations
The various sections below can link to items that are associated with this document.

Document Information: [GHSO-2014-IrisTest-00002](#)
 [Details](#)

Claims / Status Reports / Travel Authorizations
Sort search results by: -- Select -- GO


Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Status Report	Initiate a/an 2014 Final Status Report				
Claim	Initiate a/an Final Claim 2014				

The user will need to agree to the text to move to the Claim.


14.b. Enter Claim Information

The system will take you to the Claim Menu. From there, click on the 'View, Edit, and Complete Forms' button. This will take you to the required forms list.

Claim Menu

Document Information: [CM7-2013-Iris Test-00018](#)
 Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
 [Details](#)


Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Claim	Iris Test	Project Director	Claim In Process	N/A - N/A 10/01/2020 11:59PM EST

 **View, Edit and Complete Forms**
 Select the **View Forms** button below to view, edit, and complete forms.











Below is the list of forms that are required for a Claim. Fill out each form and save. When you have saved all and have no errors, you will move onto change the status.

Claim Menu - Forms

Please complete all required forms below.

Document Information: [CM7-2013-Iris Test-00018](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
 [Details](#)

Forms

Status	Page Name	Note
	Claim	
	Personnel Costs	
	Professional Fees	
	Supplies	
	Travel Expenses	
	Insurance	
	Other Non-Personnel	
	Capital Purchases	
	Budget Summary	
	Attachments	
	Claim Forms	

14.c. Change Status of Claim (Submit)

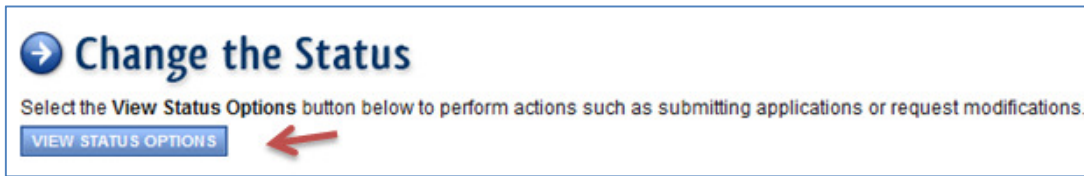
After completing the forms and saving. Click on the 'Document Information' link.

Claim Menu - Forms

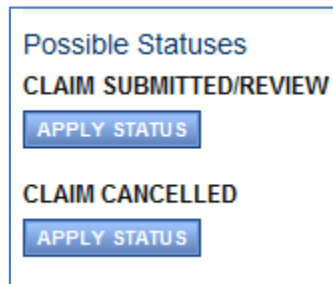
Please complete all required forms below.

Document Information: [CM7-2013-Iris Test-00018](#) 
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
 [Details](#)

You see the Document Menu now and to change the status, click on the View Status Options button, as below:



A Claim can be 'Cancelled' or 'Submitted'. Select your desired action below:



You have completed submitting a claim. If a 'Revision' is required, you will see the Claim listed in your Task List (from the Home Page).

15. Status Reports

15.a. Initiate the Status Report

Monthly and quarterly status reports will be automatically initiated. You will find them in My Tasks. Final Status Reports can be initiated once a Grant is in the 'Grant Awarded' status.

2 Roles can initiate the status Report. Users assigned these roles are the only users that can initiate:

- Agency Staff
- Project Director

From the Application Menu, click on the last option 'Claims/Status Reports/Travel Authorizations'. See below:

Application Menu

Document Information: [GHSO-2013-Iris Test-SA-00008](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application	Iris Test	Project Director	Grant Awarded	08/01/2012 - 11/30/2012 08/01/2020 12:00PM EST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.

[VIEW STATUS OPTIONS](#)

Access Management Tools

Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.

[VIEW MANAGEMENT TOOLS](#)

Claims / Status Reports / Travel Authorizations

Select the button below to view claims, status reports, and messages related to this application.

[VIEW CLAIMS / STATUS REPORTS / TRAVEL AUTHORIZATIONS](#)

This page appears where you can select Initiate a Final Status Report. Click on the link.

Claims / Status Reports / Travel Authorizations

The various sections below can link to items that are associated with this document.

Document Information: [GHSO-2014-IrisTest-00002](#)

 [Details](#)

Claims / Status Reports / Travel Authorizations

Sort search results by:



GO

Document Type	Name	Current Status	Period Date / Date Due	Created By	Last Modified By
Status Report	Initiate a/an 2014 Final Status Report				
Claim	Initiate a/an Final Claim 2014				

15.b. Updating Status Report Information

After selecting the status report you would like to work on, the system will have you 'Agree' to the special text and then take you to the Document Menu for the Status Report. Click on the 'View, Edit, and Complete Forms' button as seen below.

Status Report Menu

Document Information: [SRM7-2013-Iris Test-00019](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Status Report	Iris Test	Project Director	Status Report In Process	N/A - N/A 10/01/2020 11:59PM EST

View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)

You will see the forms that are required in the list below.

Status Report Menu - Forms

Please complete all required forms below.

Document Information: [SRF-2013-Iris Test-00018](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)

Forms

Status	Page Name	Note	Created By	Last Modified By
	Status Report Menu			
	Goals, Objectives, Tasks		Iris Nash 3/7/2013 3:31:30 PM	
	Final Report			

Click on each form, complete it and save without errors. Once you have saved the form, please click on the Document Information link to get to the Status Report Menu again.

[Back](#)

Document Information: [SRF-2013-Iris Test-00018](#)

Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)

FINAL REPORT

15.c. Submit Status Report

From the Status Report Menu, select the 'Change the Status' link as seen below:

Status Report Menu

Document Information: [SRF-2013-Iris Test-00018](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Status Report	Iris Test	Project Director	Status Report In Process	N/A - N/A 10/01/2020 11:59PM EST

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.
[VIEW FORMS](#)

Change the Status
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
[VIEW STATUS OPTIONS](#)

This screen shows the available statuses that you can move to. You can either 'Submit' the report or 'Cancel' it. Select the button you wish to move to.

Status Report Menu - Status Options
Select a button below to execute the appropriate status push.

Document Information: [SRF-2013-Iris Test-00018](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)

Possible Statuses

STATUS REPORT SUBMITTED
[APPLY STATUS](#)

STATUS REPORT CANCELLED
[APPLY STATUS](#)

16. Travel Authorization

16.a. Initiate a Travel Authorization

Travel Authorizations can be initiated once a Grant is in the 'Grant Awarded' status.

2 Roles can initiate the Travel Authorization. Users assigned these roles are the only users that can initiate:

- Agency Staff
- Project Director

To initiate a Travel Authorization from the Application Menu, please click on the last option, 'Claims/Status Reports/Travel Authorizations'. See below:

Application Menu

Document Information: [GHSQ-2013-Iris Test-SA-00008](#)

[Details](#)

Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Application	Iris Test	Project Director	Grant Awarded	08/01/2012 - 11/30/2012 08/01/2020 12:00PM EST

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.
[VIEW FORMS](#)


Change the Status
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
[VIEW STATUS OPTIONS](#)

Access Management Tools
Select the **View Management Tools** button below to perform actions such as adding people to this document or viewing the document history.
[VIEW MANAGEMENT TOOLS](#)

Claims / Status Reports / Travel Authorizations
Select the button below to view claims, status reports, and messages related to this application.
[VIEW CLAIMS / STATUS REPORTS / TRAVEL AUTHORIZATIONS](#)

16.b. Complete Travel Authorization Form

The next page shows a list of related items (Claims, Status Reports, and Travel Authorizations). Scroll down until you see the 'Travel Authorization' in the list. Screen example below:


Status Report	Initiate a/an 2013 Status Report Oct
Status Report	Initiate a/an 2013 Status Report Sept
Travel Authorization	Initiate a/an Travel Authorization 2013 
Claim	CM7-2013-Iris Test-00018 Claim

Select the item and click 'I agree.' Now the Travel Authorization has been initialized and you can update information. Below is the Document Menu.

Travel Authorization Menu

Document Information: [TA-2013-Iris Test-00003](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)


Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	Travel Authorization	Iris Test	Project Director	Travel Authorization In Process	08/27/2012 - N/A N/A



View, Edit and Complete Forms

Select the **View Forms** button below to view, edit, and complete forms.

[VIEW FORMS](#)



Change the Status

Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.


[VIEW STATUS OPTIONS](#)

To update the necessary information on the Travel Authorization, please click the 'View, Edit and Complete Forms' button (seen in the above screen). This will bring up the required forms list.





Travel Authorization Menu - Forms

Please complete all required forms below.

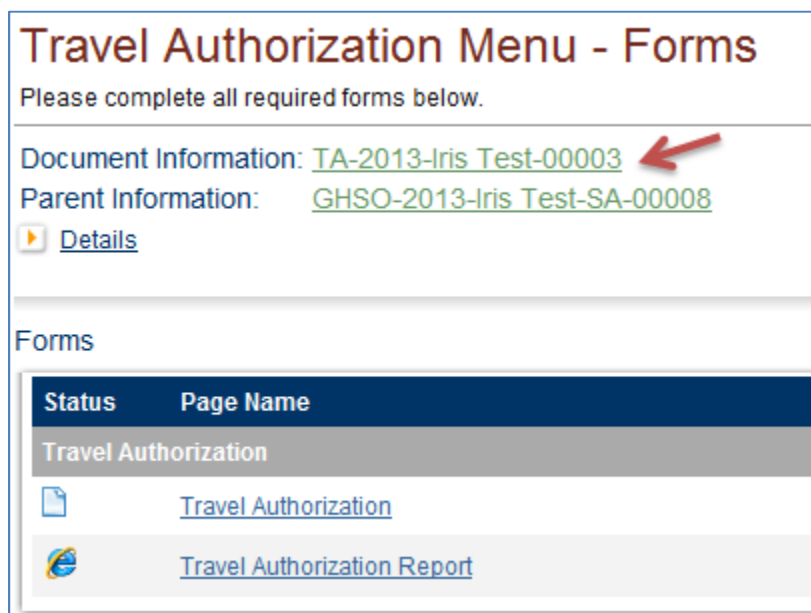
Document Information: [TA-2013-Iris Test-00003](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
 [Details](#)

Forms

Status	Page Name
	Travel Authorization
	Travel Authorization
	Travel Authorization Report



16.c. Submit Travel Authorization

Once you have selected the form, completed it, and saved without errors, you can change the status and 'Submit' the Travel Authorization. Click on the 'Document Information' where you see the red arrow below.





Travel Authorization Menu - Forms

Please complete all required forms below.

Document Information: [TA-2013-Iris Test-00003](#) 
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
 [Details](#)

Forms

Status	Page Name
	Travel Authorization
	Travel Authorization
	Travel Authorization Report

This will bring you to the Document Menu. Select the 'Change the Status' button.

Travel Authorization Menu

Document Information: [TA-2013-Iris Test-00003](#)
Parent Information: [GHSO-2013-Iris Test-SA-00008](#)
[Details](#)

Info	Document Type	Organization	Role	Current Status
	Travel Authorization	Iris Test	Project Director	Travel Authorization In Process

View, Edit and Complete Forms
Select the **View Forms** button below to view, edit, and complete forms.
[VIEW FORMS](#)

Change the Status
Select the **View Status Options** button below to perform actions such as submitting applications or request modifications.
[VIEW STATUS OPTIONS](#)

To Submit the Travel Authorization, please select 'Travel Authorization Submitted' button. See below. (Note: you can also Cancel it at this point as well)

Possible Statuses

TRAVEL AUTHORIZATION SUBMITTED
[APPLY STATUS](#)

TRAVEL AUTHORIZATION CANCELLED
[APPLY STATUS](#)

If for any reason the Travel Authorization requires modifications by you, it will be listed in your 'My Tasks' from the 'My Home' tab.

My Tasks

You have **21** new tasks.
You have **0** tasks that are critical.
Select the **Open My Tasks** button below to view your active tasks.

[OPEN MY TASKS](#)