

Oregon Crime Victim and Survivor Services Division E-Grants



Applicant User Guide

Version 2.0

CVSSD E-Grants

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1. SYSTEM REQUIREMENTS AND ASSISTANCE

Oregon CVSSD E-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 requirements mentioned below are common computer elements that should already be present.

INTERNET CONNECTION

The grants management system is an internet application designed for and accessed via the internet.

INTERNET ACCESS

This system was designed to be compatible with common up-to-date web browsers such as Microsoft Edge, Chrome, Firefox, or Safari. If the web browser is not updated, the following message will display:



Enabling Cookies

The web browser must enable cookies for this site in order to access this portal.

Multiple Browser Windows

Do not open multiple windows or browser tabs while filling out the document, as this can cause issues with browser cookies resulting in either being kicked out of the system or work being lost.

NOTE: If the user needs to have multiple windows open, please ensure that the user is using a separate browser session instead.

If utilizing Microsoft Edge, click on **File** → **New Session** for each browser session. Other internet browsers will require third party add-ons to manage multiple browser sessions.

ADOBE ACROBAT READER

Adobe Acrobat DC (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 DC, the user may choose to view, print, or save these documents. Users who do not have this software installed on their systems will need to download it from www.adobe.com.

ASSISTANCE

Both CVSSD and Agate Software have staff available to help answer any questions you may have. Your CVSSD Fund Coordinator can assist with any programmatic questions and can either assist with technical questions or direct you to someone who can help. You can also contact CVSSD E-Grants staff directly with technical questions:

Mackenzie Gray

mackenzie.e.gray@doj.state.or.us

Cecilia Lucero

cecilia.v.lucero@doj.state.or.us

For assistance with password issues or other technical questions, please contact the Helpdesk at Agate Software:

Phone: 1-866-449-1425

Email: azhelpdesk@agatesoftware.com

Hours: Monday thru Friday 8am to 5pm PST

2. OREGON CVSSD E-GRANTS HOMEPAGE

To access Oregon CVSSD E-Grants, type “<https://www.cvssdegrants.com>” into the address bar of your web browser and hit “Enter”. The page you see should look like the image shown below.

Oregon Crime Victim and Survivor Services Division E-Grants

Crime Victim and Survivor Services (CVSSD) E-Grants

Welcome to the Oregon CVSSD E-Grants system, where you may apply for and manage your CVSSD grant applications and reports. For an overview of the grant opportunities available through E-Grants please visit the [CVSSD website](#).

Steps to Get Started:

For New Users within Existing Organizations:

- Click on the “New User” link on the right-hand side of this page.
- Enter the required information and click the “Save” button at the top of the page.
- Contact an existing Authorized Official or Agency Administrator within your organization to have them add you to the organization with the appropriate permissions.
- For more information please consult the [CVSSD E-Grants Applicant User Guide](#).

Login

Username

Password

[Submit](#)

[Forgot Username/Password?](#)

[New User? Register Here.](#)

IGX Portal Login Section

The IGX portal login process requires a user to enter in a **Username** and **Password** to login.

NOTE: The password field is case sensitive and will not recognize characters of the wrong case. Precision when entering the username into the username field will decrease the risk of error messages being generated by the system.

Login

Username

Password

[Submit](#)

[Forgot Username/Password?](#)

[New User? Register Here.](#)

Logging in to the IGX Portal

Username

The username is created by the new user during the registration process OR by the user adding this user to the organization.

Password

The password is created automatically by the portal once a new user is added.

Submit Button

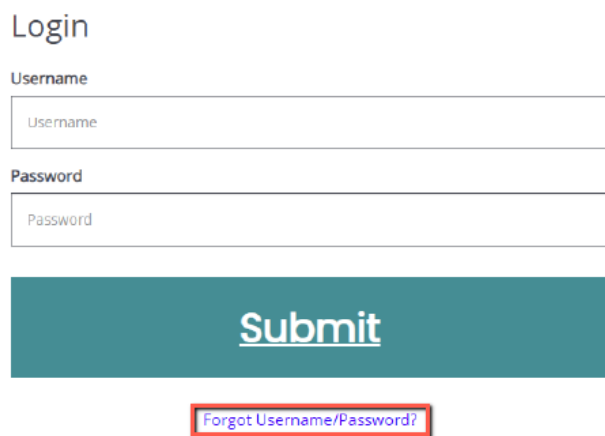
Push the **Submit Button** to login onto the IGX Portal

Trouble Shooting Issues Logging in to the IGX Portal

Forgot Username

The IGX portal allows the user to request the retrieval of their username. To do so, complete the following steps:

- 1) Click on the ***Forgot Username/Password!*** link.



Login

Username

Username

Password

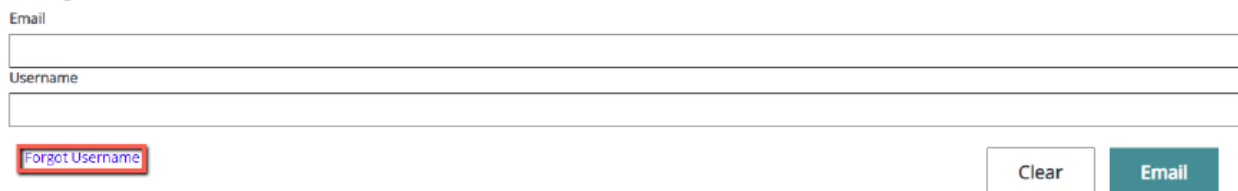
Password

[Submit](#)

[Forgot Username/Password?](#)

- 2) Click on the ***Forgot Username*** link.

Forgot Password



Email

Username

[Forgot Username](#)

[Clear](#) [Email](#)

- 1) Enter the email address and click on the ***Email*** button. An email will be sent to that email address with the user's username.
- 2) The user can follow the instructions in the ***“Forgot Password”*** section to allow them to log into the system.

“Locked Out”

Once a user has exceeded 3 login attempts for the portal, they are “locked out”. The user may use the **Forgot Password** link to request a temporary password at any point. Instructions for using the “Forgot Password” link are provided below.

Forgot Password

The IGX portal allows the user to request a temporary password be generated and sent to their email address. To do so, complete the following steps:

- 1) Click on the **Forgot Username/Password** link.
- 2) Enter the username and the email address. Click on the **Email** button. A temporary password will be sent to the email address supplied.

Forgot Password

Email

Username

[Forgot Username](#)

Clear Email

3. APPLICANT USER TYPES

There are five security roles defined for Oregon CVSSD E-Grants users: Authorized Official, Agency Administrator, Financial Officer, Writer, and Viewer. These roles have different security access to work on applications and reports. Once the Authorized Officials are identified and their new user accounts created, the Authorized Officials will select and enter their own organization’s staff names to access Oregon CVSSD E-Grants. The organization’s staff entered by the Authorized Officials will be assigned to

the Agency Administrator, Financial Officer, Writer, or Viewer security level role. Each security role is summarized below:

Security Roles	Control Access to Organization	Control Access to Applications / Reports	Read	Write	Initiate Application/ Reports	Submit Application/Reports	Cancel Application/Reports
Authorized Official	X	X	X	X	X	X	X
Agency Administrator	X	X	X	X	X	X	X
Financial Officer			X	X	X*	X*	X*
Writer			X	X			
Viewer			X				

Authorized Official will be able to:

- Edit and delete user account information for Authorized Official, Agency Administrator, Financial Officer, Viewer, and Writer
- Initiate available grants and apply for grant applications
- Enter, update, and delete information on applications and reports
- Download and attach files to the applications and reports
- Cancel an entire application or report before submission
- Submit applications, for the various applications available to Oregon CVSSD E-Grants

- Modify applications and reports within the status of Modifications Required
- Check on the status of applications and reports
- Initiate and submit grant reports

Agency Administrator will be able to:

- Edit and delete user account information for Agency Administrator, Financial Officer, Viewer, and Writer
- Initiate available grants and apply for grant applications
- Enter, update, and delete information on applications and reports
- Download and attach files to the applications and reports
- Cancel an entire application or report before submission
- Submit applications, for the various applications available to Oregon CVSSD E-Grants
- Modify applications and reports within the status of Modifications Required
- Check on the status of applications and reports
- Initiate and submit grant reports

Financial Officer will be able to:

- Edit their own user account information
- Enter, update, and delete information on applications and reports
- Download and attach files to the applications
- Modify applications and reports with status of Modifications Required
- Check on the status of applications and reports
- Initiate and submit financial reports

Writer will be able to:

- Edit their own user account information

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

Viewer will be able to:

- Edit their own user account information
- View information entered on applications and reports
- Check on the status of applications and reports

* Financial Officers **cannot** initiate, submit, or cancel applications or progress reports.
Financial Officers **can** initiate, submit, and cancel financial reports.

4. GAINING ACCESS TO OREGON CVSSD E-GRANTS

It is required that the Authorized Official for your organization first obtain access by following the procedure under section 4.b. Once the Authorized Official has obtained access to Oregon CVSSD E-Grants, they can manually add the remainder of their staff without help from Oregon CVSSD E-Grants System Administrators, as described in section 4.c. Both processes for gaining access are described below.

A. REGISTERING A NEW ORGANIZATION

Organizations using CVSSD E-grants for the first time, must have their Authorized Official register first. When the authorized official first registers, the system will request the new organizations information at that time. Follow the steps in 4b.

New users, other than Authorized Officials can gain access to E-Grants by following steps in 4b (Gaining access through a System Administrator) or 4c. (Gaining access through the Authorized Official/Agency Administrator in your organization).

B. GAINING ACCESS THROUGH A SYSTEM ADMINISTRATOR

The first time an Authorized Official comes to Oregon CVSSD E-Grants, they must create a new user account.

To create a new user account:

- 1) From the Oregon CVSSD E-Grants homepage click the “New User?” link located in the “Login” section.

Login

Username

Username

Password

Password

Submit

[Forgot Username/Password?](#)

[New User? Register Here.](#)

- 2) Complete the user form in its entirety.
 - 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 all letters and numbers.
 - c) The “Password” field must consist of all letters and numbers and must be at least 7 characters long.
 - d) The fields “Password” and “Confirm Password” must be the same.

- 1) Click “Save” to save the data.

NOTE:

- **Users registering by the *New User* link will need to be approved by the CVSSD E-Grants Admin.**
- Your account must be approved by an Oregon CVSSD E-Grants System Administrator before you can access the system. If you attempt to access the system prior to getting approved/validated by a

New User Registration

Page instructions for the registration modal

First Name

The First Name field is required.

Middle Name

Last Name

The Last Name field is required.

Prefix

Suffix

FEIN

Organization

The Organization field is required.

Title

Address

The Address field is required.

Address 2

State

Oregon

County

The County field is required.

City

The City field is required.

Zip Code

The Zip Code field is required.

Email

The Email field is required.

Phone

The Phone field is required.

Phone 2

Fax

Cell Phone

Website

Username

The Username field is required.

Password

The Password field is required.

Verify Password

The Verify Password field is required.

Notes

Save

system administrator, **the system will show their password as invalid.**

- Once the Authorized Official has created a user account and gained access to the system, they will never have to request access again. There is no need for multiple accounts within Oregon CVSSD E-Grants.
- When access has been granted to you by an Oregon CVSSD E-Grants System Administrator you will receive an email message confirming that your account has been validated.

C. GAINING ACCESS THROUGH THE AUTHORIZED OFFICIAL/AGENCY ADMINISTRATOR IN YOUR ORGANIZATION

The difference in this process than from 4b. centers on the Authorized Official/Agency Administrator generating the new user's profile in CVSSD E-Grants.

Authorized Official/Agency Administrator Completes Profile:

(The following steps will be completed by the Authorized Official/Agency Administrator)

- 1) The Authorized Official/Agency Administrator must login to the system.
- 2) Click on Your Name on the menu bar and click on Profile.
- 3) On the left Navigation Bar click on Organization Members
- 4) Click the Plus Sign on the right of the Members Search.

Organization Members

Instructions:

- Use the available search criteria to filter the members table.
- To add a new member, click the Add New button and follow the instructions.
- You can limit system access by setting the Active/Inactive dates.

Members Search

Name

Role

Active

Both

Clear

Search

▼ Members

Person Name	Role Name	Active Date	Inactive Date	Last Modified By	Last Modified By Date
Admin, Agency	Agency Administrator	06/19/18		Gray, Mackenzie	06/19/18
Administrator, Agency	Agency Administrator	06/19/18		Gray, Mackenzie	06/19/18

5) Basic demographic information must be included for the user that requires an account.

Add Person

Instructions:

- Enter new Person information and Save.
- New Person will be added to Organization currently being viewed.

General Information

First Name

Middle Name

Last Name

Title

Prefix

Suffix

Contact Information

Address

City

Zip Code

Primary Phone

Fax

Address 2

State

County

Email

WebSite

Save

6) When the information has been entered click Save.

NOTE: Passwords should be kept confidential. If for some reason your password becomes known, you should follow the procedure under section 5.a. to change your password.

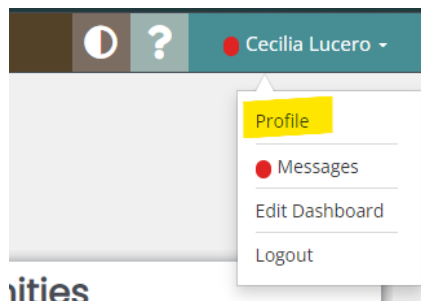
5. KEEPING CONTACT INFORMATION CURRENT

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 Oregon CVSSD E-Grants. By keeping your user record and agency record current with the latest changes, Oregon CVSSD staff will be able to contact you appropriately when the need arises.

A. UPDATING YOUR USER RECORD

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

- 1) Click on “Your name” link on the right side of the menu bar, then click “Profile”.



- 2) Update the form accordingly and click the “Save” button.

Person Information

- Edit person profile and organization role information.

Profile

Basic Information

First Name:

Middle Name:

Last Name:

Prefix:

Suffix:

Title:

Contact Information

Organizations

Test Org

Role Name	Active Date	Inactive Date	Assigned By
Financial Officer	6/19/20		mackenzie

Save

B. UPDATING THE INFORMATION FOR YOUR AGENCY

Although it does not occur frequently, when your organization's contact information changes it is important to ensure that the most updated information is listed in CVSSD E-Grants. Please contact CVSSD staff to have any necessary changes made to your agency's information. In order to guarantee that CVSSD staff know of any changes to agency information you will not be able to make any changes directly to your organization information in CVSSD E-Grants.

C. DEACTIVATING A USER IN THE ORGANIZATION

An Authorized Official or Agency Administrator from an organization may choose to deactivate a member of the organization. A deactivated user will not be able to edit application or report 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 on the name of the organization from which you would like to deactivate a member.
- 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.

The screenshot shows the 'Person Information' form. On the left is a sidebar with 'Organization Information' and 'Test Org' selected. The main area is divided into 'Profile' and 'Organizations' sections. The 'Profile' section has fields for First Name (Financial), Middle Name, Last Name (Officer), Prefix, Suffix, and Title (Financial). The 'Organizations' section shows a table with columns: Role Name, Active Date, Inactive Date, and Assigned By. The table has one row: Financial Officer, 6/19/2018, [highlighted yellow], and Gray, Mackenzie. A 'Save' button is in the top right corner.

6. INITIATE AN APPLICATION

Organization members with the Authorized Official and Agency Administrator security roles are permitted to initiate applications. After the application is initiated, the work may be turned over to a Financial Officer or Writer at the discretion of each applicant. In order to create an application, please follow these steps:

- 1) From the Dashboard, expand “My Opportunities”. This section will show you all of the grant program types under which you may apply for a new grant.
- 2) Click on the name of the grant

The screenshot shows the 'Dashboard' with instructions: 'Use the below panels to work with your Grants and Funding Opportunities.' The 'My Opportunities' panel is expanded, showing a table with columns: Name, Provider, Availability, and Description. The table has two rows: 'CAC Fund Application 2021' and 'CAMI MDT Application 2021', both from the 'Oregon Department of Justice, Crime Victim and Survivor Services Division'.

Name	Provider	Availability	Description
CAC Fund Application 2021	Oregon Department of Justice, Crime Victim and Survivor Services Division	7/1/2021 12:00:00 PM - 6/30/2023 12:00:00 PM	
CAMI MDT Application 2021	Oregon Department of Justice, Crime Victim and Survivor Services Division	1/1/2021 12:00:00 AM - 12/31/2021 12:00:00 PM	

- 3) A confirmation page will appear asking for confirmation. You must read the Terms and Conditions and by clicking the “Agree” button you accept those conditions. An application will be created, and you will be taken to the “Application Menu” where you can begin filling out the application forms.

CAC Fund Application 2021

Provided By: Oregon Department of Justice, Crime Victim and Survivor Services Division

Provided To: Test Org

Copy Forward Document:

Non-Competitive Application Availability Dates: 7/1/2021 12:00:00 PM - 6/30/2023 12:00:00 PM

Due Date: 6/30/2023 12:00:00 PM

Description: Department of Justice 2021 CAC Fund Application Non-Competitive Grant Application

Agreement Language: I hereby certify that I am authorized to initiate this application on behalf of the applicant organization.

Following the creation of an application, a new task for that grant application will be under the “My Tasks” section on the main menu. When logging into Oregon CVSSD E-Grants, expand the “My Tasks” section to return to any application or grant initiated by your organization.

*Note that initiating application does not commit you to complete the application. You can cancel at any time.

Dashboard

Instructions

Use the below panels to work with your Grants and Funding Opportunities.

My Tasks

[Initiate Related Document](#)

[Filter](#)

My Tasks

Name	Document Type	Organization	Status	Status Date	Due Date
AEAP-2016-TestOrg-00004	Non-Competitive Application	Test Org	Application In Progress	11/28/2016 12:31:14 PM	1/1/2019 12:00:00 PM
AEAP-2016-TestOrg-00005	Non-Competitive Application	Test Org	Grant Amendment Modifications Requested	7/31/2018 7:35:24 AM	1/1/2019 12:00:00 PM
AEAP-FR-2016-TestOrg-	Financial Report	Test Org	Financial Report In	4/23/2018 10:43:33 AM	6/30/2019 12:00:00 PM

7. THE APPLICATION MENU

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

VOCA-C-2019-TestOrg-00017

Document Landing Page New Note

View document details.

Template VOCA Competitive Application 2019	Instance VOCA Competitive Application 2019	Process Competitive Application	
Document Name VOCA-C-2019-TestOrg-00017	Document Status Application In Progress		
Organization Test Org	Your Role Authorized Official	Period Date 4/1/2019 12:00:00 PM 9/30/2022 12:00:00 PM	Due Date 7/2/2019 12:00:00 PM

A. FORMS

The “Forms” section is where most of the work in an application is completed. This section contains all the forms that are necessary to complete prior to the application being submitted. To edit application forms simply expand the “Forms” section and then click on the name of the form you wish to edit.

VOCA-C-2019-TestOrg-00017

Document Landing Page

View document details.

Template VOCA Competitive Application 2019	Instance VOCA Competitive Application 2019	Process Competitive Application	
Document Name VOCA-C-2019-TestOrg-00017	Document Status Application In Progress		
Organization Test Org	Your Role Authorized Official	Period Date 4/1/2019 12:00:00 PM 9/30/2022 12:00:00 PM	Due Date 7/2/2019 12:00:00 PM

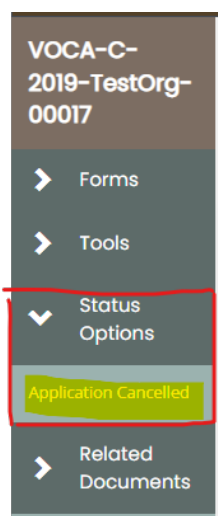
Forms

- Request for Applications
- Request for Applications
- Amendments/Clarifications to the Request for Applications
- Form Instructions
- VOCA Allowable and Unallowable Costs and Services
- Grant Management Handbook

B. STATUS OPTIONS

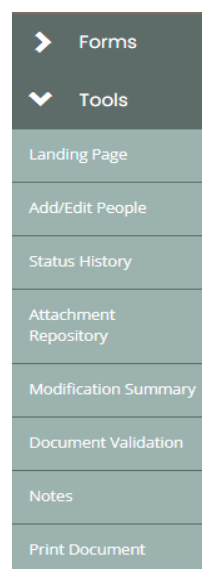
The “Status Options” section allows an Authorized Official or Agency Administrator the ability to submit applications or push the application to the next status level. Expand the

“Status Options” section to see what status push options you currently have available to you.



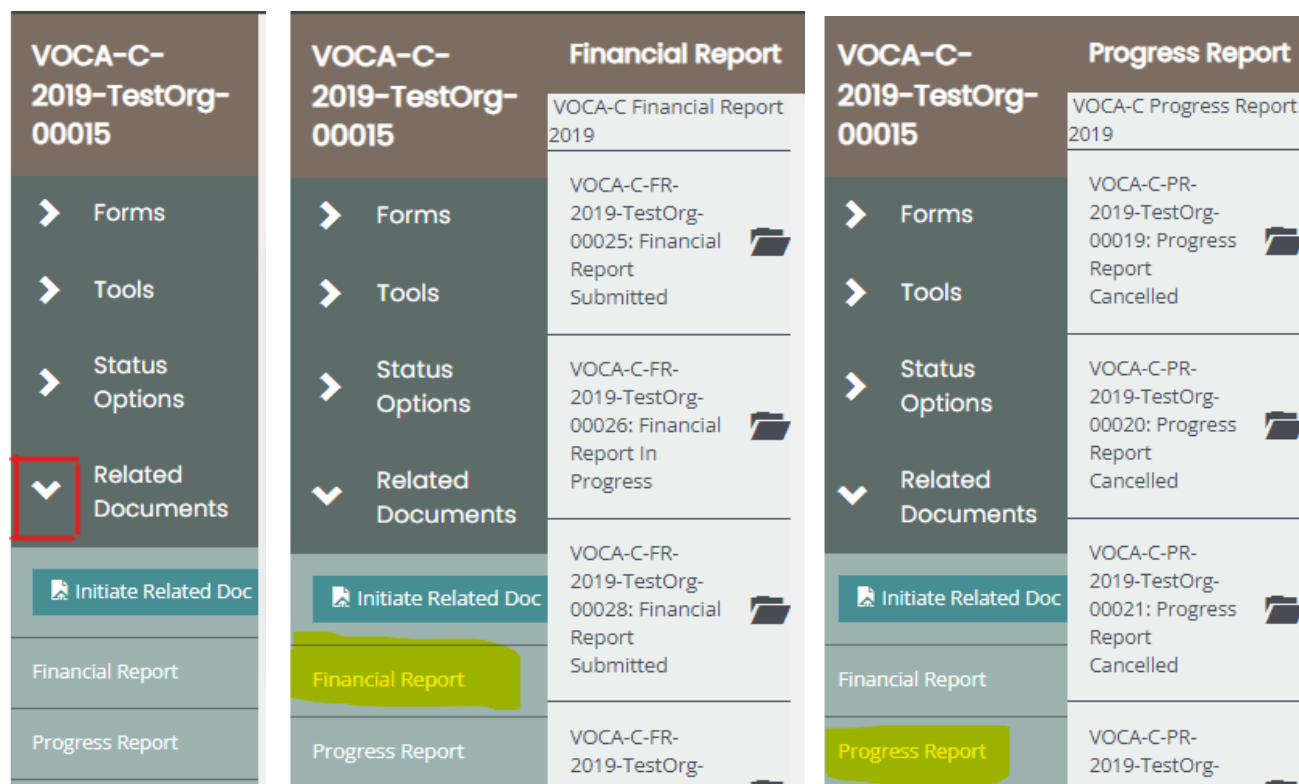
C. TOOLS SECTION

The Tools section allows users to access certain tools to use in relation to their application. These tools enable the user to: create a pdf version of their application, add/edit access to the application, view the status history of the application, check for errors on the application, and view any history of modifications to the application. Some capabilities in this section will be limited based on the role of the user accessing them.



D. RELATED DOCUMENTS

The “Related Documents” section is where you will find documents that are related to an application or grant. An example of a related item would be a Progress Report and Financial Report. Click on the report name to view that report.



8. ASSIGNING USERS TO AN APPLICATION

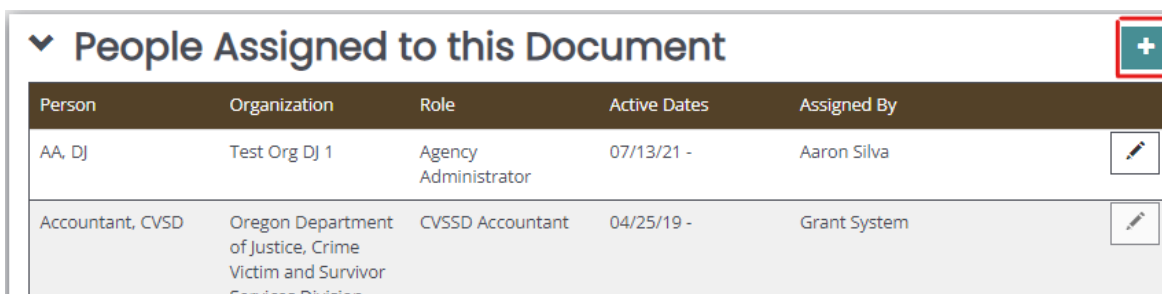
The Authorized Official and Agency Administrator have administrative rights to add or remove Financial Officers, Writers, and Viewers to or from applications. Authorized Officials can also add or remove Agency Administrators to or from applications. Users with the Writer security role can assist the Authorized Official, Agency Administrator, and Financial Officer with completing the forms in the application.

Any Authorized Official or Agency Administrator that is a member of the organization that is applying for a grant will be automatically added to that application when the application is first created. Any Authorized Official, Agency Administrator, Financial Officer, Writer, or Viewer member who is added to the application will also be automatically added to all corresponding Progress Reports and Financial Reports when each is created. New users to Oregon CVSSD E-Grants will not be automatically added to the organization's

existing applications. However, any user may be manually added to the application throughout the entire application/grant process.

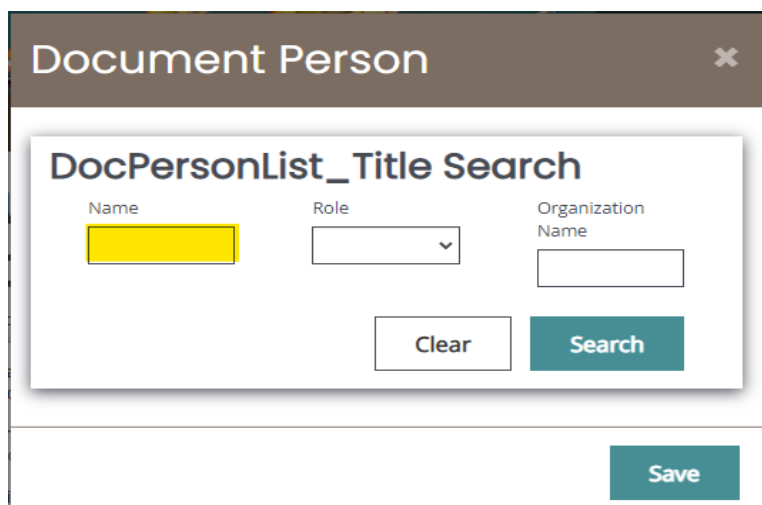
A. ASSIGN USER ACCESS TO APPLICATION

- 1) To add a user to an application, the Authorized Official or Agency Administrator clicks on the application in the “My Tasks” Section on the Dashboard.
- 2) The Authorized Official or Agency Administrator will click the “Tools” button and choose “Add/Edit People”.
- 3) The Authorized Official or Agency Administrator should click on the plus sign



Person	Organization	Role	Active Dates	Assigned By
AA, DJ	Test Org DJ 1	Agency Administrator	07/13/21 -	Aaron Silva
Accountant, CVSD	Oregon Department of Justice, Crime Victim and Survivor Services Division	CVSSD Accountant	04/25/19 -	Grant System

- 4) Type in the first or last name of the individual in the search criteria box and click the “Search” button.



Document Person

DocPersonList_Title Search

Name

Role

Organization Name

Clear

Search

Save

- 5) From the search results, the Authorized Official or Agency Administrator will select the person, give them a security role, and fill in the access dates for when the individual should have to access the application.

Document Person

DocPersonList_Title Search

Name

reimer

Role

Organization Name

Clear

Search

DocPersonList_Title

Person Name	Organization(s)	Document Role	Active Date	Inactive Date
reimer, robin	Test Org (Viewer)			

Save

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 “Tools” and then choose “Add/Edit People”.

- 1) Click on the edit pencil icon to access start and/or end date for the user.

Person	Organization	Role	Active Dates	Assigned By
AA, DJ	Test Org DJ 1	Agency Administrator	07/13/21 -	Aaron Silva

- 2) Enter the inactive date and click save.

Document Person

Person
AA, DJ

Role
Agency Administrator

Active Date
7/13/2021

Inactive Date

Save

NOTE: Unlike your Organization Members list, the list of people associated with an application will include CVSSD staff. You will be unable to change these individuals' access to the application.

9. APPLICATION FORM COMPLETION

If you click on the “Forms” in the side navigation panel 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.

A. FORMS NAVIGATION

You can navigate to the forms of your application by using the navigation panel on the side. The panel is visible at all times, and you can use it to move from form to form.

Within a form you can click on the “Next Form” button at the bottom of the page.

Next Form >

Note: Make sure to Save the page before you navigate away from it.

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.

As you are filling out forms, remember to click “Save” regularly. The system has a one-hour time-out, meaning that you must click “Save” at least once an hour or the system will automatically time-out. **Any information you entered but did not save before the system times you out will be lost.**

R. Personnel New Note | Save | Add | Delete

Instructions:

- Complete this page and click **SAVE**, fields will populate with information and any errors will be noted at this point.
- Required fields are marked with a *.
- Once the page has been saved with no errors, you can click the "Add" button at the top of the page to add additional staff.

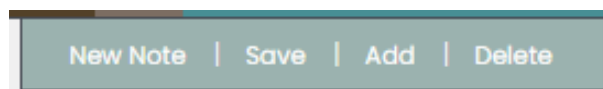
Only include costs for staff providing direct client services and services that can be identified specifically with the project. Personnel costs may include FTE for supervision of direct service staff and completion of project specific records, statistics and reports. Expenses related to any staff performing general administrative duties or duties that cannot be readily identified with the project must be included as 'Indirect/De Minimis Costs' or 'Administrative Costs' on the 'Other Costs' form. General administrative duties include, but are not limited to, salaries and expenses of executive directors, personnel administration and fiscal administration.

	Year 1	Year 2	Year 3
1. Staff Name:	test 4 of 100		
2. Position Title:	admin 5 of 100		
3. Salary funded by this grant:	\$ 1,000.00	\$	\$
4. Total annual salary for full-time equivalent (1 FTE):	\$	\$	\$

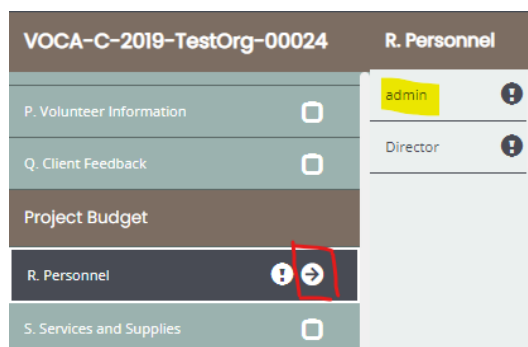
Show the annual salary and the percentage of time the staff position is to be allocated to the project. In Year 1. Refer to the Application Instructions for a more detailed explanation and a calculation example.

0 of 500

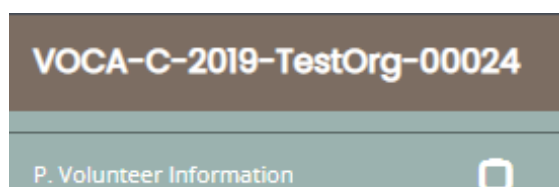
For some forms, such as the Staff Roster, you may need to complete multiple copies of the form, as each individual will need their own form page. Any form that has an “Add” button allows you to have multiple instances of that form. The following picture shows the available “Add” button on a page from which multiple pages can be created.



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

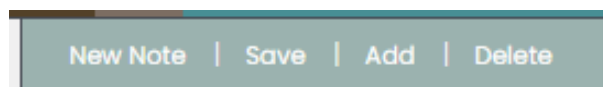


When additional pages have been created, an arrow will appear after the form name to indicate that pages connected with the particular link.



C. DELETING FORMS

Some forms in the Oregon CVSSD E-Grants system are not required if they do not apply to your organization. If you start completing a form that does not apply to your organization, you can use the “Delete” button at the top of the page to delete the form. The “Delete” button is not available on pages that are required for all applicants. The following picture shows the “Delete” button on a page that is not required.




D. AUTOMATIC CALCULATIONS





When possible, Oregon CVSSD E-Grants will automatically calculate totals for you. The “Budget Summary” page is a good example of this. When the page is saved the system will take the values that you have entered in the previous budget pages and display them on the Budget Summary page. The system will then sum those numbers to give a Grand Total. Remember to click the forms “Save” button in order to have the system complete the calculations.

Personnel	Year 1 Grant Funds	Year 2 Grant Funds	Year 3 Grant Funds	Total Grant Funds
Salary	\$1.10	\$2.20	\$3.30	\$6.60
Personnel Expenses	\$4.40	\$5.50	\$6.60	\$16.50
Total Personnel	\$5.50	\$7.70	\$9.90	\$23.10
Services & Supplies	Year 1 Grant Funds	Year 2 Grant Funds	Year 3 Grant Funds	Total Grant Funds
Contractual Services	\$1.00	\$1.00	\$1.00	\$3.00
Travel	\$2.00	\$2.00	\$2.00	\$6.00
Training	\$3.00	\$3.00	\$3.00	\$9.00
Office Supplies	\$4.00	\$4.00	\$4.00	\$12.00
Postage	\$5.00	\$5.00	\$5.00	\$15.00
Printing & Copying	\$6.00	\$6.00	\$6.00	\$18.00
Communication	\$7.00	\$7.00	\$7.00	\$21.00
Equipment Rental	\$8.00	\$8.00	\$8.00	\$24.00
Total Services & Supplies	\$36.00	\$36.00	\$36.00	\$108.00

E. ERROR MESSAGES

If there are any application rules violated (such as a not entering something in a required field), 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 Oregon CVSSD E-Grants will require the errors to be fixed before the application submission is completed.** See the example below.


Attention

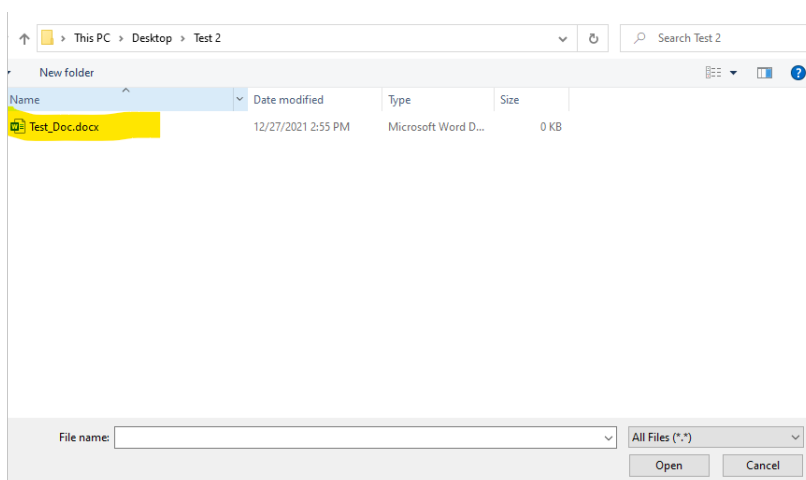
-  You must complete the board roster and certify that it is complete or select NA.
-  You must respond to Question 1.
-  You must respond to Question 2.
-  You must respond to Question 3.

F. 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: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls and.xlsx. To upload a file, 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.

G. PRINT DOCUMENT

Under “tools” Print Documents 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 forms for completion, and to verify you have the forms you want/need.

The screenshot displays the 'Tools' menu on the left and a checklist on the right. The 'Tools' menu includes options like 'Landing Page', 'Add/Edit People', 'Status History', 'Attachment Repository', 'Modification Summary', 'Document Validation', 'Notes', and a highlighted 'Print Document' button. The checklist on the right has columns for 'Include', 'Exclude', and 'Include Blank Copy' for various document sections. The 'Include' column is selected for all sections.

	Include	Exclude	Include Blank Copy
ALL	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
A. Cover Page	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Services Checklist	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Staff Roster	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Governing Body Roster and Information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Volunteer Information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Project Description	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Policies and Procedures Narrative	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
H. Meaningful Access	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
I. MOUs, Contracts, and Subawards	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
J. Program Income Narrative	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
K. Attachments to Upload	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
L. Personnel	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
M. Contracts and Subawards	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
N. Services and Supplies	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
O. VOCA Match	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
P. Budget Summary	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attachments	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fund Coordinator/Grantee Notes	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

H. 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 Oregon CVSSD E-Grants. Oregon CVSSD E-Grants will not recognize certain formatting, including **bolding**, *italicizing*, underlining, tables, graphs, photographs, bullets, and certain tabs. 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 Oregon CVSSD E-Grants.

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. Many word processing programs have a “Word Count” feature applicants can use to track the number of characters they have used, though it is important to ensure this is set to count characters (including spaces), not words.

10. SUBMITTING YOUR APPLICATION

The Authorized Official and Agency Administrator security roles are the only roles authorized to submit your Application. When the application is believed to be complete

and no more changes are required, the Authorized Officials or Agency Administrators 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 Authorized Official or Agency Administrator 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 Authorized Official or Agency Administrator attempts to submit, they will receive an error message directing them to the form(s) with errors. **All errors must be fixed before Oregon CVSSD E-Grants will allow an application to be submitted.** If no errors exist, the Authorized Official or Agency Administrator will be prompted to confirm his or her decision.

Status Options

Application Submitted

Application Cancelled

Document Validation ✕

Below is the status of each form. Select the form name to navigate and make changes to any of the forms.

☐ Show forms that I cannot adjust

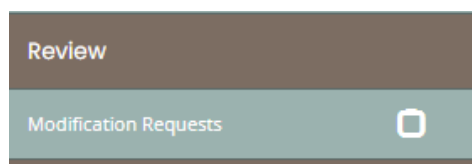
Form Name	Status	May Prevent Status Change
A. Cover Page	Error(s)	Yes
B. Services Checklist	Error(s)	Yes
D. Staff Roster	Error(s)	Yes
E. Governing Body Roster and Information	Error(s)	Yes
F. Volunteer Information	Error(s)	Yes

11. GRANT APPLICATION REVISIONS

After reviewing your application, CVSSD staff may require modifications to your application. In that case, CVSSD staff will change the status of the application to open it back up for editing.

- 1) After logging in to E-Grants, go to the "My Tasks" section on the dashboard.

- 2) The application for you to revise will show up on the list. Click on the name of the application.
- 3) Expand "Forms"
- 4) Towards the bottom of the list of pages you will now see a "Modification Requests" form. Click on this form to see a list of all the revisions needed.

A screenshot of the 'Modification Requests' form. On the left is a sidebar with the header 'VOCA/CFA-2021-TestOrg-00015' and several menu items: 'Fund Coordinator/Grant Notes', 'Review', 'Modification Requests' (highlighted), 'Funding And Agreement', and 'Grant Agreement Upload'. The main area has a title 'Modification Requests' and a 'New Note' button. Below the title are instructions: 'All required fields are marked with an *', 'Use the Save button to save text and calculate data on each page.', 'Hit Save before you proceed to another page.', and 'Save at least every 30 minutes to avoid losing data.' The form itself has a label 'Modifications requested:' and a large empty text area.

- 5) In order to revise something in the application, simply go to that page and make the revision. Be sure to click "Save" when finished with each form.
- 6) Once all revisions are complete, go back to the Application Menu. The link for this can be found towards the top of any form. If on the Forms Menu, you can get to the Application Menu by click on the application name link next to the words "Document Information."
- 7) On the Application Menu, click on "View Status Options."
- 8) Click on "Apply Status" under "Application Modifications Submitted."

CVSSD staff will contact you will any additional questions or concerns.

12. GRANT AGREEMENT PROCESS

Below are the instructions that you need to follow in order to successfully process your grant agreement. **Special note:** It is important that you follow **Step 4** in order to finalize the grant agreement process and be able to submit quarterly or narrative reports.

- 1) Once your grant agreement has been put in the mail to you, CVSSD staff will change the status of your application to "Agreement Acceptance Required."
- 2) You will receive an e-mail notice that the status of your application has been changed.
- 3) You will receive the grant agreement, have it signed by the appropriate party, then upload the agreement into E-Grants
- 4) **Once you have sent the grant agreement back you will need to change the status of the application.** This can be done by going to "My Tasks," clicking on the link to the application, clicking on "View Status Options," and clicking on "Apply Status" under "Agreement Accepted."
- 5) When CVSSD staff receives your signed grant agreement, we will change the status of your application to "Grant Awarded."

Grant Agreement Upload

Please print and review the unsigned grant agreement. Have the appropriate party sign the agreement and any applicable exhibits. Once signed, please upload the signed grant agreement and exhibits in the "Grantee Signed Grant Agreement" upload field.

You may download a copy of the fully signed grant agreement by clicking on the link next to "Fully Signed Grant Agreement".

Unsigned Grant Agreement:

Select

Drag Files Here

Grantee Signed Grant Agreement:

Select

Drag Files Here

Fully Signed Grant Agreement:

Select

Drag Files Here

Unsigned Revised/Amended Grant Agreement:

Select

Drag Files Here

Fully Signed Revised/Amended Grant Agreement:

Select

Drag Files Here

13. GRANT AMENDMENT PROCESS

While your grant is in Grant Awarded status, you may request an amendment to make changes to your application.

Please note: The E-Grants system will not allow you to submit a financial report while an amendment is in process, so please plan accordingly.

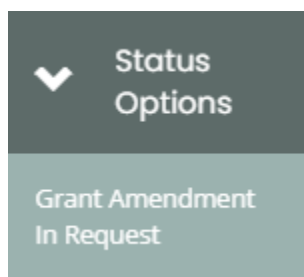
A. AMENDMENT USES

- **Budget Amendment** – will enable grantees to request to move awarded funds from one line item to another. Note: These requests should be made *prior* to spending money outside of budget allocations. Budget modifications are required when:

- You are proposing a funding increase or decrease in/out of Personnel Services
- Services and Supply expenditures are changing more than \$500 in a budgeted line item
- For any unbudgeted line-item expenses where you now anticipate expenses
- **Programmatic Changes** – will allow grantees to request the emphasis of the program to another area or location.
- **Change in Grant Award Period** – will extend the end date of the grant beyond the original end date. **FOR COMPETITIVE GRANTS ONLY**
- **Goals/Objectives/Performance Measure Changes** – will change the goals, objectives, outputs, and/or outcomes associated with the grant.
- **Other** – Please contact your Fund Coordinator.

B. STARTING AN AMENDMENT

- 1) From the home page scroll down to the “My Tasks” section.
- 2) Click on the link to the application for which you want to submit an amendment. You may only request amendments for applications in “Grant Awarded” status.
- 3) Click on the “View Status Options” button on the Application Menu.
- 4) Click “Status Options” under “Grant Modification in Request.”



5) From the Application Menu click on the “View Forms” button.

6) Click on the “Modification Request” form on the Forms Menu.



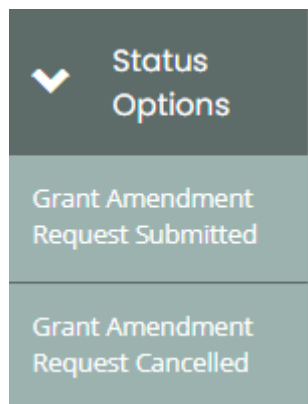
7) Complete the Amendment Request form per the instructions on the page.

The screenshot shows the 'Amendment Request' form. At the top, the title 'Amendment Request' is in a large, bold font. Below it, there are instructions: 'Instructions: Please complete this page and click SAVE, any errors will be noted at this point. Required fields are marked with a *. To create a new amendment request, click on the ADD button and a new, blank page will appear.' A yellow warning bar states: 'Please be sure you have changed the status to "Grant Amendment in Request" prior to completing this page, as you will not be able to save the page if this hasn't happened. Another status will be sent once the Amendment Request is approved or denied, or if CVSSD staff need additional information. An amendment is not authorized until it is approved by DOJ CVSSD.' The form has four numbered sections: 1. 'Date of Request:' with a calendar icon and a text box. 2. 'This request is for the following change(s):*' with three checkboxes: 'Budget Amendment', 'Programmatic Change(s)', and 'Other'. Below 'Other' is a text box with a '0 of 300' character count. 3. 'Provide a detailed explanation and justification of the proposed change(s) and the effect the change(s) will have on the project:' with a large text box and a '0 of 2000' character count. 4. 'Budget Amendment Request Forms'.

C. SUBMITTING AN AMENDMENT

1) Once all needed information has been included on the Amendment Request form, make sure to save the page and then navigate back to the Application Menu.

2) Click “Apply Status” under “Grant Modification Request Submitted.”



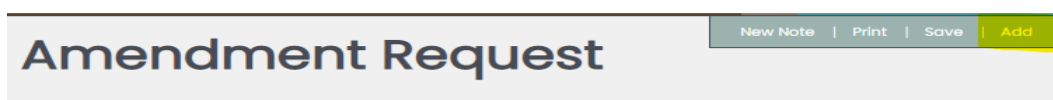
At this point, your grant Fund Coordinator will review your Grant Amendment Request, make comments at the bottom of the page, and decide whether to make the changes or to deny the request.

The Fund Coordinator may also require modifications or clarifications to the Amendment and change the status to Grant Amendment Clarifications Requested. At this point you can make the requested changes or clarification and change the status back to Grant Amendment Request Submitted.

D. MULTIPLE AMENDMENTS

You can submit additional Amendment Requests after other Amendments have been completed. To do this:

1. change the status to Grant Amendment In Request.
2. When it is in that status, go to the last amendment request form
3. click the **ADD** button in the Amendment Request Form for each new Amendment.



14. NOTES

Oregon CVSSD E-Grants allows for users to add notes to applications or reports. These notes can be accessed by the side panel or on the top right of any form by clicking on “new notes”.

You can use these notes but be aware that you are unable to attach files at this time.

The screenshot displays the Oregon CVSSD E-Grants application interface. On the left is a vertical sidebar titled 'Tools' with a dropdown arrow. The sidebar contains the following menu items: 'Landing Page', 'Add/Edit People', 'Status History', 'Date Modification', 'Attachment Repository', 'Modification Summary', 'Document Validation', 'Notes' (which is highlighted with a dark background), and 'Print Document'. The main content area shows a 'Notes' form. At the top right of the form is a search icon. Below it is a text input field with a 'Format' dropdown menu and buttons for bold (B), italic (I), underline (U), code (</>), bulleted list, and numbered list. At the bottom right of the form are four icons: a lock, a link, a pencil, and a paper plane.

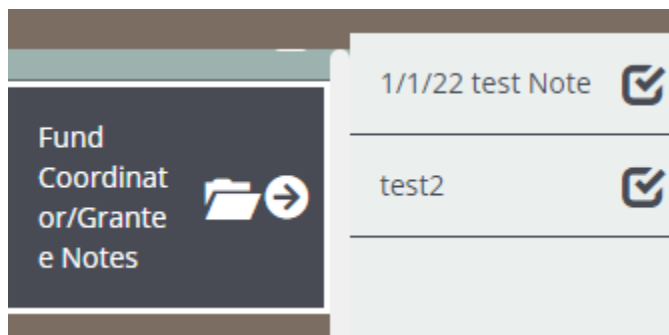
A. USING FUND COORDINATOR/GRANTEE NOTES

We encourage you to add notes using the Fund Coordinator/Grantee Notes page under the Miscellaneous section

The screenshot shows a section titled 'Miscellaneous' with a dark brown header. Below the header are two menu items, each with a square icon to its right: 'Attachments' and 'Fund Coordinator/Grantee Notes'.

1. Click on Fund Coordinator Grantee Notes

- a. If there is more than one note, you will see an envelope icon and it will expand the tab



- b. Click on any of the previously created notes
- c. Click Add (top right corner of the page) and a new note will be created. Continue following steps 2-5.

2. Fill out the Date and subject

3. Upload document (if needed)

4. Enter Comment

5. Click Save

A screenshot of a web application form titled 'Fund Coordinator/Grantee Notes'. At the top right of the form area, there are three links: 'New Note', 'Save', and 'Add'. Below the title, there is a 'Date & Subject:' label followed by a text input field. Below this, there is a progress indicator showing '0 of 100'. There are four identical rows, each containing a 'Select' button and a text input field with the placeholder text 'Drag Files Here'. At the bottom of the form, there is a 'Comments:' label followed by a large text area for entering comments.

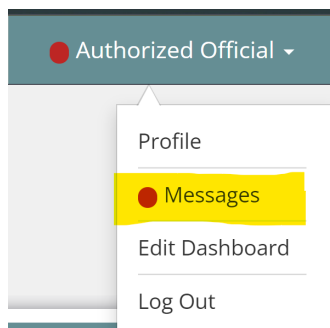
15. AUTOMATIC E-MAIL NOTIFICATIONS

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 Oregon CVSSD staff. 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.

A. 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 Oregon CVSSD staff. You can view or edit your System Messages by following these steps:



▼ Inbox

Mark As Read	▼	Apply		
<input type="checkbox"/>	From	Subject	Sent	
<input type="checkbox"/>	Grant System	TestOrg Has Submitted VOCA/CFA-2021-TestOrg-00011 Application	12/27/2021 3:06:54 PM	
<input type="checkbox"/>	Grant System	Financial Report J-VOCA-FR-2021- TestOrg-00004 Received	12/3/2021 3:16:54 PM	
<input type="checkbox"/>	Grant System	Financial Report J-ODSVS-FR-2021- TestOrg-00009 Received	12/2/2021 9:11:54 PM	

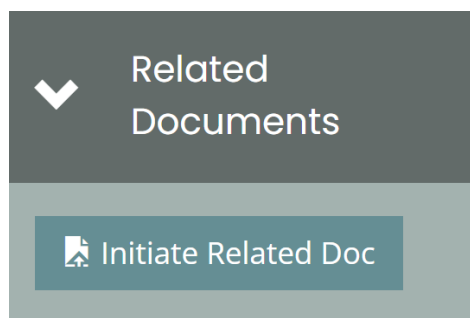
Click the “Open My Inbox” button under the “View My Inbox” section on the main menu. You will now see any unread system messages. You may filter system messages by choosing an option from the drop down labeled “Sort my inbox messages by.”

- 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
 - (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

16. INITIATING A PROGRESS REPORT (PR)

After an application has reached the Grant Awarded status anyone with the role of Authorized Official or Agency Administrator can initiate, complete, and submit a progress report.

- 1) From the home page scroll down to the “My Tasks” section.
- 2) Click on the link to the application for which you are submitting a progress report.
- 3) In the left-hand navigation panel under “Related Documents” click on “Initiate Related Doc”.



- 4) On the pop-up page select the appropriate Progress Report from the “Available Documents” dropdown.

- 5) A confirmation page will appear. Click the “Agree” button. A Progress Report will be created, and you will be taken to the Progress Report landing page.

Joint Progress Report 2021

×

Provided By:	Oregon Department of Justice, Crime Victim and Survivor Services Division
Provided To:	Test Org
Progress Report Availability Dates:	8/1/2020 12:00:00 AM - 12/31/2022 11:59:00 PM
Due Date:	12/31/2022 12:00:00 PM
Description	No Summary Provided
Agreement Language:	Are you sure you want to start this Progress Report?

Agree

Decline

Once a progress report has been created, it will appear in the “My Tasks” section on the home page, as well as under the “Related Documents” section on the left-hand navigation panel of the application under which the report was initiated.

A. THE PROGRESS REPORT NAVIGATION PANEL

FORMS

The “Forms” section is where most of the work in a report is completed. This section contains all the forms that are necessary to complete prior to the report being submitted.

TOOLS

The Tools section allows user to access certain tools to use in relation to their Progress Report. These tools enable the user to: create a full pdf version of their report, add/edit access to the report, view the status history of the report, check for errors on the report, and view any history of modifications to the report. Some capabilities in this section will be limited based on the role of the user accessing them.

The screenshot displays the 'Document Landing Page' for a report titled 'VOCA-C-FR-2019-TestOrg-00021'. The page is divided into a left sidebar and a main content area.

Left Sidebar:

- VOCA-C-FR-2019-TestOrg-00021
 - Template: VOCA-C Financial Report: 2019
 - Status: Financial Report In Progress
 - Organization: Test Org
 - Your Role(s): Authorized Official
 - Financial Report Inputs
- Financial Report: Personnel Expenditures
- Training Expenditures
- Emergency Services Expenditures
- Financial Report: All Expenditures and Match
- Documentation for All Purchases Exceeding \$3000, Contracts, and Subawards
- Miscellaneous
 - Attachments
 - Fund Coordinator/Grantee Notes
- Tools
- Status Options
- Related Documents

Main Content Area:

Document Landing Page New Note

View document details.

Template	Instance	Process
VOCA-C Financial Report: 2019	VOCA-C Financial Report: 2019	Financial Report

Document Name	Document Status
VOCA-C-FR-2019-TestOrg-00021	Financial Report In Progress

Organization	Your Role
Test Org	Authorized Official

Progress Timeline:

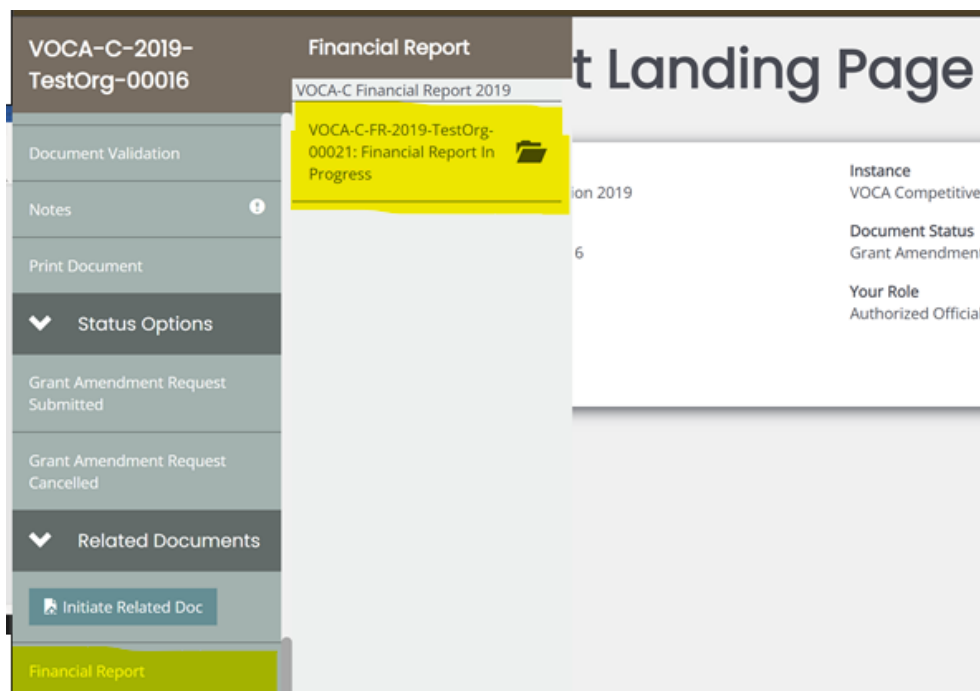
- Financial Report In Progress (Current status, marked with a checkmark)
- Financial Report Submitted
- Financial Report Modifications Required
- Financial Report Modifications Submitted
- Payment Funded

STATUS OPTIONS

The Status Options section allows an Authorized Official or Agency Administrator to push the Progress Report to the next status level.

RELATED DOCUMENTS

The Related Documents section has a link back to the application where the Progress Report was started from.



B. PROGRESS REPORT FORM COMPLETION

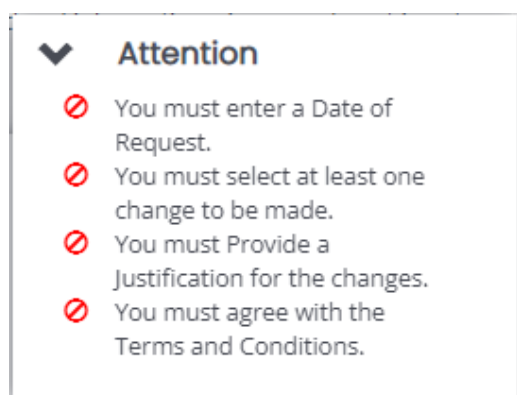
If you are not already in the Progress Report you want to complete, you can go to your “My Tasks” and click on the link that is the name of the report that you want to work on. To complete report forms simply expand the “Forms” section and then click on the name of the form you wish to edit. In most cases, the first form you will complete will require you to enter information such as the quarter you are reporting for, so that CVSSD E-Grants may then generate the appropriate report forms for you to complete.

C. AUTOMATIC CALCULATIONS

Just like when filling out an application, when possible, the Oregon CVSSD E-Grants System will automatically calculate totals for you. When the page is saved the system will use the values you have entered and complete all calculations. Remember to click the “Save” button in order to have CVSSD E-Grants complete the form calculations.

D. ERROR MESSAGES

If any information is not completed within a Progress Report form in its entirety or there are mistakes, an error message will be displayed in red across the top of the page. During form completion it is not necessary to correct form errors right away. You may return to the form and fix errors at any time prior to submitting the report. If any errors remain when attempting to submit the Progress Report, CVSSD E-Grants will require the errors to be fixed before the Progress Report submission is completed.



E. SUBMITTING PROGRESS REPORTS

The Authorized Official and Agency Administrator roles are the only roles authorized to submit your Progress Report. When the Progress Report is believed to be complete and no more changes are required, the Agency Authorized Official or Agency Administrator can choose to submit. To submit the Progress Report, please use the following directions:

- 1) Go into the Progress Report you want to submit. If you are not already there you can do so by going to your "My Tasks" and clicking on the link that is the name of the report that you want to submit.

Joint-PR-2021-TestOrg-00014

Forms

Tools

Status Options

Related Documents

New Note

Document Landing Page

View document details.

Template

Joint Progress Report 2021

Instance

Joint Progress Report 2021

Process

Progress Report

Document Name

Joint-PR-2021-TestOrg-00014

Document Status

Progress Report In Progress

Organization

Test Org

Your Role

Authorized Official

Period Date

7/31/2020
12:00:00 PM
12/29/2022
11:59:00 PM

Due Date

12/31/2022
12:00:00 PM

✓

Progress Report In Progress

○

Progress Report Submitted

○

Progress Report Modifications Required

○

Progress Report Modifications Submitted

○

Progress Report Approved

- If it is not already, expand the “Status Options” section by clicking on the arrow in the corner and click on “Progress Report Submitted.”

Joint-PR-2021-TestOrg-00014

Forms

Tools

Status Options

Progress Report Submitted

Progress Report Cancelled

Related Documents

New Note

Document Landing Page

View document details.

Template

Joint Progress Report 2021

Instance

Joint Progress Report 2021

Process

Progress Report

Document Name

Joint-PR-2021-TestOrg-00014

Document Status

Progress Report In Progress

Organization

Test Org

Your Role

Authorized Official

Period Date

7/31/2020
12:00:00 PM
12/29/2022
11:59:00 PM

Due Date

12/31/2022
12:00:00 PM

✓

Progress Report In Progress

○

Progress Report Submitted

○

Progress Report Modifications Required

○

Progress Report Modifications Submitted

○

Progress Report Approved

✓

Status Options

Progress Report Submitted

Progress Report Cancelled

- Click “OK” in the pop-up box to confirm that you would like to submit the report.

Page 47 of 56

×

Are you sure that you want to change the status from
Progress Report In Progress to Progress Report Submitted?
Please enter any notes in regards to this status change

Cancel

OK

- 4) If any errors exist in the progress report, they will appear at that time and must be fixed before it can be submitted. If no errors exist, you will be prompted to confirm the submission.

Document Validation

×

Below is the status of each form. Select the form name to navigate and make changes to any of the forms.

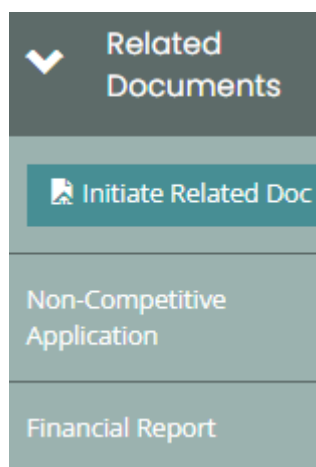
☐ Show forms that I cannot adjust

Form Name	Status	May Prevent Status Change
Reporting Period Selection	Error(s)	Yes
Common Requirements for All 2021-2023 Joint Non-Competitive Grant Funds	Form is required and has not been saved	Yes
Organization/Program Revenue	Form is required and has not been saved	Yes
ODSVS Semi-Annual Narrative Report	Form is required and has not been saved	Yes
Emergency Sheltering Services	Form is required and has not been saved	Yes

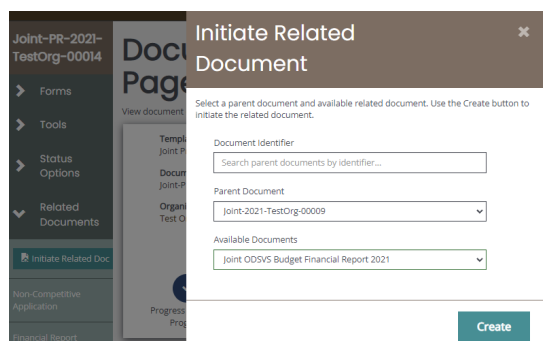
17. INITIATING A FINANCIAL REPORT (FR)

After an application has reached the Grant Approved status anyone with the role of Authorized Official, Agency Administrator, or Financial Officer can initiate financial reports. In order to initiate a financial report, follow these steps:

- 1) From the home page scroll down to the “My Tasks” section.
- 2) Click on the link to the application for which you are submitting a financial report.
- 3) On the Application Menu click on “Examine Related Items”



- 4) Under the Related Documents section, click on the “Initiate a Financial Report” link.
- 5) A confirmation page will appear. Click the “I agree” button. A Financial Report will be created, and you will be taken to the “Financial Report Menu.”



6) Click on the “View Forms” button to access the financial report forms.

Once a financial report has been created, it will appear in the “My Tasks” section on the home page, as well as under the “Examine Related Items” section on the Application Menu of the application under which the report was initiated.

A. THE FINANCIAL REPORT MENU

VIEW, EDIT AND COMPLETE FORMS

The Forms section is identical to the application forms section.

CHANGE THE STATUS

The Change the Status section allows an Agency Authorized Official or Agency Administrator the ability to push the Financial Report to the next status level.

ACCESS TOOLS

The Tools section allows user to access certain tools to use in relation to their Financial Report. These tools enable the user to: create a full pdf version of their report, add/edit access to the report, view the status history of the report, check for errors on the report, and view any history of modifications to the report. Some capabilities in this section will be limited based on the role of the user accessing them.

J-ODSVS-NB-FR-2021-TestOrg-00006

Document Landing Page

View document details.

Template Joint ODSVS No Budget Financial Report 2021	Instance Joint ODSVS No Budget Financial Report 2021	Process Financial Report	
Document Name J-ODSVS-NB-FR-2021-TestOrg-00006	Document Status Financial Report In Progress		
Organization Test Org	Your Role Authorized Official	Period Date 12/1/2017 12:00:00 PM 1/1/2025 12:00:00 PM	Due Date 1/1/2026 12:00:00 PM

Progress Timeline:

- Financial Report In Progress (Completed)
- Financial Report Submitted
- Financial Report Modifications Required
- Financial Report Modifications Submitted
- Payment Funded

RELATED DOCUMENTS

The Related Documents section has a link back to the application where the Financial Report was started from.

B. FINANCIAL REPORT FORM COMPLETION

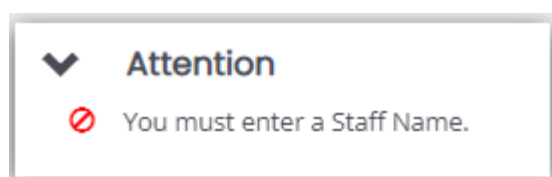
If you click on the “View Forms” button under “View, Edit and Complete Forms” on the Financial Report Menu, you will be directed to the Forms Menu, where you may begin completing your Financial Report. In most cases, the first form you will complete will require you to enter information such as the quarter you are reporting for, so that CVSSD E-Grants may then generate the appropriate report forms for you to complete.

C. AUTOMATIC CALCULATIONS

Just like when filling out an application, when possible, the Oregon CVSSD E-Grants System will automatically calculate totals for you. When the page is saved the system will use the values you have entered and complete all calculations. Remember to click the “Save” button in order to have CVSSD E-Grants complete the form calculations.

D. ERROR MESSAGES

If any information is not completed within a Financial Report form in its entirety or there are mistakes, an error message will be displayed in red across the top of the page. During form completion it is not necessary to correct form errors right away. You may return to the form and fix errors at any time prior to submitting the report. If any errors still remain when attempting to submit the Financial Report, CVSSD E-Grants will require the errors to be fixed before the Financial Report submission is completed.



Please note: There are certain rules built into the Financial Report forms in CVSSD E-Grants to ensure that expenditures are occurring within the grant budget. Though it does allow for a small amount flexibility, please remember that all deviations from your budget should be approved by your Fund Coordinator ahead of time and will likely require a grant amendment.

E. SUBMITTING FINANCIAL REPORTS

The Authorized Official, Agency Administrator, and Financial Officer roles are the only roles authorized to submit your Financial Report. When the financial report is believed to be complete and no more changes are required, the Authorized Official, Agency Administrator, or Financial Officer can choose to submit the report. To submit the financial report, please use the following directions:

- 1) Go to the Financial Report Menu. From the financial report forms you can go back to the Financial Report Menu by clicking on the “Financial Report Menu” option at the top of the page.

VAWA-C-FR-2020-TestOrg-00015

- Forms
- Tools
- Status Options
- Financial Report Submitted
- Financial Report Cancelled
- Related Documents

1. Staff Name

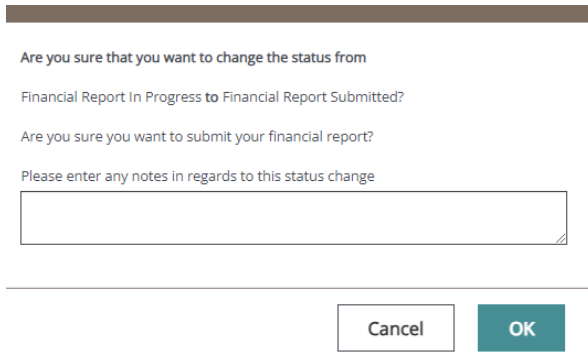
2. Position

3. Expenditure

4. Provide a description

2) Click on the “Financial Report Submitted” in the “Change the Status” section.

3) Click on the “Apply Status” button under “Financial Report Submitted.”



Are you sure that you want to change the status from

Financial Report In Progress to Financial Report Submitted?

Are you sure you want to submit your financial report?

Please enter any notes in regards to this status change

Cancel OK

4) If any errors exist in the financial report, they will appear at that time and must be fixed before it can be submitted. If no errors exist, you will be prompted to confirm the submission.

18. HELP DESK

For **technical questions** related to the use of the CVSSD E-Grants System, please contact the Help Desk at Agate Software:

Phone: (866) 449-1425

Email: azhelpdesk@agatesoftware.com

Hours: Monday thru Friday 8am to 5pm PST

For **programmatic questions** related to a grant application or report, please contact the Crime Victim and Survivor Services Division, and ask to speak to your Fund Coordinator for the assigned to the grant program.

CVSSD Office hours are: 8:00am to 5:00pm Monday – Friday

19. HELPFUL HINTS

Here are a few helpful hints to remember as you are moving through the system:

- **Save regularly** - The system will time out after one hour, so make sure you are clicking “Save” at least that often and always before you leave a page.
- **Submit your application early** – CVSSD E-Grants will not allow you to submit your application until any errors caught by the system are corrected. The system will not allow you to submit an application after the due date, so give yourself time to resolve these issues well before that.
- **Do not submit your application until it is complete** – Though you will still be able to view your application once you have submitted it, you will no longer be able to edit it, so make sure you are finished before submitting it.
- **Use word processing/notepad programs for text** – Though you can type text directly into textboxes, you may want to consider typing into a word processing or notepad program and copying/pasting your information into the system. This will allow you to use spell-check, maintain a copy of your work for use in other applications, and type in a program to which you are accustomed. Use caution with formatting, however, as textboxes in the system will not recognize some formatting.
- **Ask for help** – If you get stuck, both CVSSD staff and the Agate Help Desk are ready to help. If you have a question about the application or what a certain question means, feel free to call CVSSD staff. If you have a technical issue with the system, or you have forgotten your Username to access the system, you

can call the Agate Help Desk from 8 a.m. to 5 p.m. If whoever you call cannot answer your question, they can direct you to someone who can.

- **Forget your password** – Unfortunately, we do not have access to your password. On the page where you enter your username and password there is a link labeled “**Forgot Password?**” If you go to that page, it will ask you for your username and e-mail address, and as long as those match it will send a new password to your e-mail address (usually within about 15 minutes). Then, you can use your new password to log in, go into your profile and change your password to whatever you would like it to be. If you have forgotten your username, you will need to contact the Agate Help Desk at 1-866-449-1425 or azhelpdesk@agatesoftware.com.

20. HELPFUL HINTS ON REPORTING:

- To access the reports associated with an application you click on “Examine Related Items” on the Application Menu. Conversely, to access the application associated with a report you click on “Examine Related Items” on the Report Menu. In order to most quickly move between the financial report and progress report, use the “Examine Related Items” to get back to the application, and then again under the application to get to the report you are trying to access.
- Always remember to click “Save” before moving to a different page. Any changes made without clicking “Save” will not be retained.
- A report cannot be initiated until the application is in “grant awarded” status.
- If a report was initiated and not completed the report will appear in the “My Tasks” section of the home page.