DPS WebGrants – Notes and Helpful Hints

Announcements

- Located on the Login Screen
- Any important messages pertaining to the WebGrants system will be noted here, usually in **red font**. For example, if the system is being taken down for maintenance, and will be unavailable during a certain time period, an announcement will be posted
- If you experience a technical issue, please contact DPS immediately and alert us of the problem; many times a technical issue is an isolated occurrence that can be quickly resolved
- If you receive an error message from the system, please take a screenshot of the message and forward it to your regional representative; these messages can help the developers to pinpoint the problem
  - To capture a screenshot press ALT & Print Screen simultaneously; paste into a word document or e-mail
- If any of the DPS grant programs become aware of a technical issue within WebGrants, we will do our best to alert you of the problem!

Correspondence

- Grant communication must be sent through the Correspondence component of your grant, rather than by traditional e-mail
- If your contract is not currently "Underway", you will either need to wait until the status changes, or you may email your regional representative with questions or issues
- Do not click "Reply" to the **e-mail alert** you receive
- In order to respond to a Correspondence from WebGrants, you must log-in and open the message; there is a Reply feature located within the Correspondence.
- Be sure to include your name and agency at the bottom of your Correspondence…we like to know who we're communicating with!

Grant Contact Information

- If any of your grant contact information changes (i.e. your project contact person has a new e-mail address), you **must** notify your regional representative of this change
  - Individual users can update their profile at any time, however the grant contact information must be updated by DPS as this information will not carry over to the contract
  - Please submit a Correspondence detailing the change
    - A separate Correspondence will need to be submitted for each affected contract

Helpful Tips/Information

- Browser Buttons
  - Do **not** use your browser's "Back" or "Refresh" buttons!
- When working in WebGrants, you should only use the system's Back button …otherwise the system gets confused and scary things happen!

- Updating CCR/SAM information
  - From the Main Menu, click "My Profile"
  - Choose your organization
  - Click "Edit"
  - Verify the agency's CCR/SAM code and enter the new "Valid Until Date"
  - Save

- If you only have one registered user for your agency, we strongly advise you add at least one additional user
- **Do *not* simply update an existing profile with a new name and e-mail address**
  - **New users should be *added* to the organization**
    - Go to "My Profile"

        - Choose your agency name from Associated Organizations
        - Under Registered Users, click "Add"
        - Complete all required information, and "Save"
    - The previous user should be **removed** from the organization profile
        - Go to "My Profile"
        - Choose your agency name from Associated Organizations
        - Under Registered Users, click "Remove" next to the Registered User's name
    - Notify your regional representative of these changes so that any contact information within the contract may be updated if necessary

<u>**Claims**</u>

- Claims must be submitted monthly
- All expenses must be submitted within 60 days of being incurred (with the exception of FINAL claims)

- Log-in to WebGrants
    - Select "My Grants"
    - Choose the Name of the applicable project
    - Select "Claims" from the list of components

- Create a new claim
    - Click "Add" (located in the top menu bar)
    - Claim Type should be "Monthly"
    - Report Period is the month you are claiming expenses for
    - Invoice number is for State agencies **ONLY** – please ignore this box if you are not a State agency; if you are a State agency, please complete
    - Final Report should be marked "No" until you reach the end of your contract/final claim
    - Click "Save" once you have entered all required information
    - Click "Return to Components"

- **Reimbursement form – DO THIS STEP NEXT**
    - After creating your claim, you must open the Reimbursement form to enable auto-fill
    - Mark as Complete

- **Timesheets**
    - Daily activity timesheets are required to be kept by grant funded personnel
        - **Activities must be reported according to pay period dates within WebGrants**
        - Daily timesheets should be used to record total hours within the WebGrants Activity Timesheet
        - Total hours from daily activity timesheets must match those entered into WebGrants
        - Any paid time off (vacation, sick leave, holiday pay, etc) should be listed in the "Paid Time Off" column only
            - VAWA offers two separate activity timesheet options
                - The 1st option is for Victim Service agencies
                - The 2nd option is for Criminal Justice agencies
                - You are required to use the appropriate timesheet for your agency
            - SSVF, VOCA, and SASP offer only one option for activity timesheets

        - Staff information is the first module to complete
            - Click "Add"
            - Enter employee name, total number of victims served for the month being claimed, and immediate supervisor's name
            - Click "Save"
            - You must repeat this process for each grant funded employee

- Activity Timesheet is the next module
  - Click “Add”
  - Choose Employee name (the employees previously entered will appear)
  - Select the Start Date and End Date of the **pay period**
  - Enter the number of hours spent on each activity during this pay period
  - Hours that fall outside the contract period should be entered under “Non-Allowable Hours”
  - Click “Save”
  - Again, you must repeat this process for each grant funded employee

- Other Allowable Hours/Paid Time Off is the final module of the Timesheet
  - Any hours claimed as “Other Allowable” must have an explanation provided
  - Click “Add”
  - Choose Employee name
  - Select the Start Date and End Date of the activity or paid time off
  - Provide a brief, yet clear explanation of the activity being claimed
    - Do not simply state “attended training”, provide the type of training to help us determine eligibility
    - Record the number of hours spent on the activity
    - Click “Save”
  - Verify the hours listed in the Other Allowable Hours column and/or Paid Time Off column reflect the total hours provided in this description module
  - Click “Edit” and then “Save”
  - Click “Mark As Complete”
  - **FOR VAWA RECIPIENTS ONLY**
    - You must also select the Activity Timesheet that is NOT used by your agency
    - Click “Edit” and then “Save” – Do NOT enter activities into this additional timesheet
    - Click “Mark as Complete”

- **Detail of Expenditures form**
  - Click “Add” to create a new line for each expense
    - Choose the appropriate Line Number which corresponds to the expense you are claiming
    - Enter the Pay Date
    - Select the Budget Category
    - Enter the check number used to pay this expense
      - If paid electronically, please enter EFT
      - Payee Information – who you owe for the expense
      - Description of the expense
        - For payroll and fringes, the **pay period dates must be provided**
        - If claiming volunteers, the number of hours must be provided
        - If claiming mileage, the number of miles must be provided
      - Gross Salary/Actual Amount
        - Gross salary must be provided, **minus any overtime or bonus pay**
        - Pre-tax deductions must be removed from FICA/Medicare calculations
      - % of Funding Requested
        - Salary and benefits cannot be claimed at a percentage greater than that supported by the activity timesheets
      - % of Match Funding Requested **(note: not all contracts include match!)**
        - Represents a percentage of the “% of Funding Requested”
          - Example - 50% of a new computer will be used as match and paid for by the agency; the remaining 50% is requested for reimbursement
            - The % of Funding Requested is 100%
            - The % of Match Funding Requested is 50%

- You must add a new line for each pay period and each expense being claimed
- Once you have double-checked your entries, you must "Mark as Complete"

- **Named Attachments**
  - Upload attachments under their appropriate headings
  - To upload a file, click the appropriate Attachment link
    - For example, click the "Personnel/Overtime/Volunteer Match" link to upload documentation for personnel costs, including fringe benefits
    - **PLEASE make sure your scans are oriented correctly before you upload them to the system**
      - It requires an unbelievable amount of time for us to rotate multiple pages on screen in order to view documentation – remember, we are processing claims for multiple agencies, and multiple contracts
      - Your claim may be returned to you if scans require rotation, which will delay processing and payment
  - Once attached, you may click the file name to preview your scans
  - "Mark as Complete"

- **Program Income (applies to VAWA contracts ONLY)**
  - If your agency generates income, please contact your regional representative for further instruction/information
  - **For those that do not generate program income**
    - Open the Program Income component, click "Edit", then "Save", and "Mark as Complete"

- **Other Attachments**
  - This section will rarely, if ever be used
  - Open the link, "Mark as Complete"
    - You must mark this component as complete, even if it is not used. Otherwise the system will not allow you to submit the claim.

- **Submitting Your Claim**
  - Once all information has been entered, and the necessary files attached, you can "Preview" your claim
  - "Preview" allows you to see the claim as we see it
  - This offers another opportunity to double-check your information & numbers
    - Compare column totals from the Detail of Expenditures form and Reimbursement form to ensure they equal; if they do not, notify your Program Representative so that they can look into the problem!
  - **It is the agency's responsibility to ensure all information is entered correctly**
    - Due to time constraints, claims that are "negotiated" for corrections will likely not be processed until the following month
  - All components of the claim must have a check mark (√)
  - When you are comfortable with the information you have entered, click "Submit"

- **Copying Claims**
  - Once a claim is paid, you will have the option to "copy" the existing claim
  - If you choose to use the copy feature, please be aware that **ALL** information will need to be **reviewed and updated within the claim**
    - This includes the general information, timesheets, detail of expenditures form, and the reimbursement form

  - Once created, a claim cannot be deleted
    - Please submit your claims in proper order so that they will be easier to reference in the future
      - Claim 1 = month 1
      - Claim 2 = month 2
      - Claim 3 = month 3
      - Etc, etc…

- Your agency should receive an alert when your claim is paid
    - Upon receiving this alert, please log-in and check the "Feedback" located at the bottom of the claim
        - Any corrections that were made, or issues to be aware of before submitting future claims, can be found in this section
        - It is important to review and understand this information each time a claim is paid, prior to submitting your next claim
        - If you do not see any Feedback listed…congratulations!!!

Travel

- Please refer to the DPS Sub-Recipient Travel Policy available on our website
- A copy of the per diem rates for lodging and meals should be included with your attachments when claiming these expenses
    - o The area traveled to should be highlighted, along with the allowable rates
- When claiming mileage, a mileage log must be provided
    - o The mileage log must provide a purpose for the travel (i.e. court advocacy, training - Basics of Advocacy, transport victim to dr. appointment, etc.)
        - Please note – when training mileage is claimed the name/type of training must be provided, otherwise DPS staff do not know which training the mileage is being claimed for!

Contract Adjustments

- Requests for contract adjustments must be received
    - o **at least 30 days prior** to the change being effective
    - o **at least 60 days prior** to the end of the contract period
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Site Monitoring

- Site monitoring visits will be scheduled in advance
- Pre-site monitoring report(s) must be completed within WebGrants by the agency for each contract, and submitted prior to the scheduled visit
    - A separate report is required for each contract; each report should reflect only those services provided by the applicable grant
- The required forms will **not** be unlocked for the agency to complete until after the site visit has been scheduled and confirmed by your program representative
    - Sample monitoring report forms can be downloaded from our website for review at any time
        - Please note: not all forms are applicable to every agency, nor to every grant. Only those pertaining to your agency/contract will be available in your site monitoring report.
    - A list of Site Monitoring FAQ's is also provided on our website
- Once the visit has been scheduled, the appropriate forms will be unlocked; agencies can then access the forms by logging into the WebGrants system
    - Click "My Grants"
    - From the Grant Components menu, select "Status Reports"
        - The Status Report type will be "Site Visit"
            - Please note the due date for submitting this report is also provided on this screen
        - Select the contract number associated with the Site Visit report
        - Click on each listed component in order to open
            - Some components will require you to both "Edit" and "Add" information
        - Remember to "Save" after completing each component
        - Once you have saved your work, and the component is complete, you must "Mark as Complete"
            - If you discover an error after marking a component complete, you may still edit this information
        - Once all components are complete you can "Preview" your information
        - If you are satisfied your information is accurate, click "Submit"

- If your agency has more than one grant contract with CVSU, these steps will need to be repeated for each grant that is to be monitored

This information is intended to provide additional guidance and assistance for using the WebGrants system; if you have any questions, please feel free to contact your regional representative!