Helpful Tips & Information for Navigating DPS WebGrants

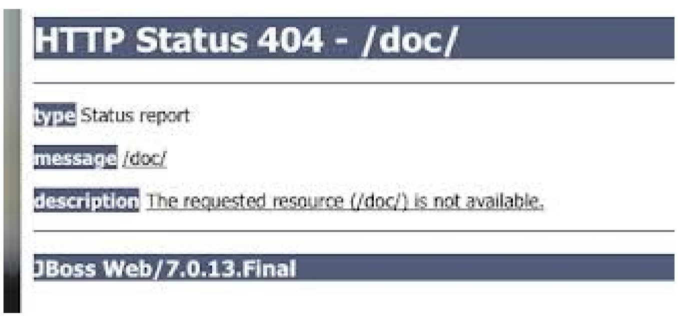
Created for the Crime Victims Services Unit

Announcements

- Located on the Login Screen
- Important messages pertaining to the WebGrants system will be noted here, usually in **red font**
  - For example, if the system is taken down for maintenance, and will be unavailable during a certain time period, an announcement will be posted

WebGrants Technical Issues

- If you experience a WebGrants technical issue while working in the system, please contact DPS immediately and alert us of the problem; many times a technical issue is an isolated occurrence that can be quickly resolved
  - Please take a screenshot of the message *(example below)* and forward it to your regional representative; in your message describe what you were doing when the error occurred
    - To capture a screenshot (on many PCs/laptops), press **ALT** & **Print Screen** simultaneously
    - Paste into a Word document or the body of an e-mail
  - These screenshots often assist the developers in pinpointing the exact problem more quickly



Registered Users

- If the agency has only one authorized user for WebGrants, we **strongly advise** you add at least one additional user to the agency's profile
- **Do NOT share User Ids or Passwords**; each user should have their own unique Id and Password
  - Sharing User Ids and Passwords poses a security risk!
- New users must be **added** to the organization's profile
  - From the Main Menu, select "My Profile"
  - Choose the Organization name from "Associated Organizations"
  - Scroll down to Registered Users and select "Add"
  - Complete all required information; double-check that the new user's e-mail address is entered correctly, then select "Save"
  - WebGrants will generate e-mail alerts to the new user containing their User ID and Password
  - Please notify your Regional Representative of the addition of a new Registered User so that appropriate action may be taken **within the subaward** (i.e. updating additional contacts)
- Former users must be **removed** from the organization's profile
  - Please notify your Regional Representative of the need to remove a Registered User from the agency's profile so that appropriate action may be taken
- To **update** a user's information (name change, title, e-mail address, etc.), contact your Program Representative via WebGrants Correspondence

Updating SAM Code information

- System for Award Management (SAM) codes expire yearly and must be updated at **www.SAM.gov**
- Once updated in the Federal system, **agencies must notify DPS of the new expiration date**
  - If your agency's SAM.gov profile is not marked "Public", you must send a copy of the confirmation page including the **agency's name, SAM Code, expiration date, and the Exclusion Status** to DPS for verification

Correspondence

- Grant specific communication must be sent through the **Correspondence** component of your subaward, rather than by e-mail
    - This creates a record which is stored with the contract, as well as enables all Program staff access to the communication history if your Program Rep is unavailable
- You will periodically receive messages and alerts from WebGrants via e-mail.
  - Do not click "Reply" to these e-mail alerts!
    - Clicking reply sends your message to a generic e-mail address, rather than to your recipient
- In order to respond to a WebGrants alert, you must create a new message in the **Correspondence** component of the appropriate subaward
  - Select "Correspondence" from the list of components in the subaward
  - Create a new Correspondence by selecting "Add", **or** select the applicable message and click the "Reply" button **located within the message**
- In order to select multiple recipients for your message, press and hold the CTRL key while selecting names in the "To" field
- If a recipient is not listed in the "To" field, type their **e-mail address** in the "CC" field
  - CC addresses must be entered in a valid **email format**
  - **Use a semicolon (;) to separate multiple email addresses**
  - Include your name and agency name in the Correspondence…we like to know who we are communicating with!

Contact Information

- If any of the contact information within the subaward changes (i.e. Authorized Official, Project Director, Project Contact Person, Fiscal Officer, Project Contact Person, or Non-Profit Chairperson), you **must** notify your regional representative of the change **ASAP**
  - Submit changes via WebGrants Correspondence
  - Please note, a change in Authorized Official will require additional documentation; contact your Program Representative for information
- A separate Correspondence will need to be submitted for **each affected subaward**

Claims for Reimbursement

(See "Claims 101 Training" PowerPoint, available on our website under each funding opportunity, for more detailed information on submitting Claims)

- Claims for Reimbursement are due by the **5th of each month**
  - If the 5th falls on a weekend or holiday, Claims are due the **next business day**
- **Activity Timesheets**
  - VAWA offers two separate activity timesheet options (SSVF & SASP offer only one option); when completing a VAWA Claim, you are required to use the appropriate timesheet for your agency
    - The 1st option is for Victim Service agencies
    - The 2nd option is for Criminal Justice agencies

- Daily activity timesheets are **required** to be kept by all **grant funded personnel** (templates are available on our website for your reference and/or use)
    - Daily activity timesheets must be signed by <u>both</u> the employee and supervisor
    - Daily activities must be recorded for each **pay period**
    - Daily activity timesheets must account for **all paid hours**, to include time worked on each eligible activity, other allowable hours, non-allowable hours, and paid time off
        - PTO (vacation, sick, holiday, etc.) should be listed in the "Paid Time Off" category only; do not record this time as Other Allowable or Non-Allowable Hours
    - Hours recorded on daily activity timesheets must correspond to the pay period totals entered into the WebGrants Activity Timesheet
    - Hours reflected on timesheets must also correspond to agency payroll records
    - Any hours claimed as "Other Allowable" **must** be accompanied by an explanation
        - Provide a brief, yet clear explanation of the activity being claimed as allowable
        - Do not simply state "training"; provide the title and/or type of training, as well as approval date (if the specific training was not already approved in the budget)

- **Detail of Expenditures form**
    - When claiming fringe benefits, the employee is **not** the payee/recipient of the payment; you must enter the name of the person/company/contractor/etc. payment was made to
    - For payroll and fringe benefits, pay period dates or coverage period must be provided; for utilities, mileage, etc. the coverage dates must be provided
    - If a fringe benefit is a percent of salary (Worker's Comp, Unemployment Comp, Pension, etc.) the rate being claimed must also be included in the description
    - If claiming volunteer time, the number of volunteer hours and rate claimed must be provided
    - If claiming mileage, the number of miles and mileage rate being claimed must be provided
    - When claiming FICA/Medicare, pre-tax deductions (if any) must be deducted from the calculation
    - Salary and/or fringe benefits cannot be claimed at a percentage greater than that supported by WebGrants activity timesheets for the same pay period
        - A lesser percentage may be claimed
    - **% of Match Funding Requested** (does not apply to all subawards) represents a percentage of the percentage <u>requested</u>
      Example 1 – A new computer is requested through the grant. 50% of the cost will be applied to the agency's match requirement; the remaining 50% is requested for reimbursement. The % of Funding Requested will be 100%; the % of <u>Match</u> Funding Requested will be = 50%
      Match equals 50% of the 100% requested
      Example 2 – Advocate A works 75% on eligible activities; 25% of her **eligible time** is used as Match. The % of Funding Requested is 75%; the % of <u>Match</u> Funding Requested is 25%
      Match equals 25% of the 75% requested
      Example 3 – Prosecutor B works 80% on eligible activities; all of his **eligible time** is used as Match. The % of Funding Requested is 80%; the % of <u>Match</u> Funding Requested is 100%
      Match equals 100% of the 80% requested
      Example 4 – Investigator C works 30% on eligible activities; 0% of their **eligible time** is used as Match. The % of Funding Requested is 30%; the % of Match Funding Requested 0%
      Match equals 0% of the 30% requested
- **Reimbursement form** – This form will auto populate based on entries added to the Detail of Expenditures form
    - Applicable to *most* awards, but there may be exceptions
- **Attachments**
    - Do not send password protected files; we will not be able to open them!

- **Preview** your Claim prior to submission
  - **It is the agency's responsibility to ensure all information is entered correctly!**
  - From the Claim Components screen, select "Preview"
  - This will allow you to see the Claim in its entirety, similar to how we see it once submitted
  - Double-check your totals; this is a quick and easy way to identify some common errors!
  - If totals from the Detail of Expenditures form do not match totals on the Reimbursement form, notify your Program Representative ASAP
  - If your Claim is submitted with errors, it may be returned for corrections, which will delay processing/payment
  - Due to time constraints, Claims that are "negotiated" for corrections may not be processed until the following month
  - If you submit a Claim, and realize an error was made, contact your Regional Representative ASAP; the Claim will either be negotiated, or the correction may be made for you
- Once created, a claim cannot be deleted; contact your Regional Representative if a Claim needs to be "Withdrawn" from submission
- 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.
- Your agency should receive an alert once the Claim is approved and/or paid
  - Upon receiving this alert, log-in and check the "Feedback" section of your Claim; Feedback is located at the bottom of each Claim
    - Any changes or corrections that were made to the Claim will be notated here
    - Issues (or "for future reference" comments) we want the submitter to be aware of will also be noted here
    - **It is important to review and understand this information each time a Claim is paid, prior to submitting the next Claim**
    - If you do not see any Feedback listed…congratulations!!! ☺

Travel

- Please have grant staff familiarize themselves with the DPS Sub-Recipient Travel Policy (available on our website)
  - The DPS Travel Policy must be adhered to, **unless the agency policy is more restrictive**
- Training expenses **will not** be reimbursed until **after** the training has taken place
- A copy of per diem rates for lodging and/or meals should be included with your attachments when claiming these expenses
  - The area traveled to should be highlighted, along with the allowable rates
  - Meal receipts are not required to be submitted if using approved per diem rates
    - Again, if the agency policy is more restrictive, the agency policy must be followed
- When claiming mileage, a mileage log must be provided
  - Mileage logs must include date(s) of travel, odometer readings/number of miles driven, purpose of travel, etc.
    - Examples of purpose may include: court advocacy, training, transport victim to appointment, client job interview, etc.
    - When training mileage is claimed, the name and/or type of training must be provided, otherwise DPS will not know what training the mileage is claimed for, or if it was eligible

Subaward Adjustments

- Requests for contract adjustments must be received
  - **at least 30 days prior** to the change being effective
  - **at least 60 days prior** to the end of the contract period
  - Subaward adjustments are generally not retroactive
- Program Revision – a change in the project or agency name, scope of the project, etc.
- Budget Revision – any change which will impact the approved contract budget, such as adding a new line item; moving more than 10% into an existing line; moving funding into Personnel/Personnel Benefits
  - Please remember to include sufficient details for the adjustment in the "Justification" portion of the request…who, what, when, why, as well as how much is being moved from here to there

Site Monitoring

- Site monitoring visits are typically scheduled in advance
- Pre-site monitoring report(s) must be completed within WebGrants by the agency for each subaward, and submitted prior to the scheduled visit (your Program Representative will work with regarding these schedules)
  - A separate report is required for each subaward; each report should reflect only those services provided by the applicable subaward contract
- 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 within WebGrants; agencies can then access the forms by logging into the WebGrants system and accessing "Status Reports" from the list of components, and selecting the appropriate Site Visit Monitoring report
- Agencies will need to complete each form of the monitoring report; each form must be marked "Complete" prior to submission

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! We are here to help!