INDIANA DEPARTMENT OF HOMELAND SECURITY INTELLIGRANTS USER MANUAL

VERSION 9.0

INTELLIGRANTS

IntelliGrants is used by Indiana Department of Homeland Security (IDHS) SubGrantee(s) to apply for, manage, submit documents, track, and amend grant projects.

This user guide gives an overview of IntelliGrants, covering how to navigate the IntelliGrants system such as: view and send email, initiate and manage applications, complete program and fiscal report forms grant adjustment notices (GAN's), etc.) including system requirements, user roles, and common tasks performed by the system users based on their assigned roles.

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INTELLIGRANTS SYSTEM REQUIREMENTS

Most users can use IntelliGrants with little or no changes to their computer setup. The following requirements are common elements that should be present on most machines.

Operating System

IntelliGrants is designed for two of the more common computer operating systems—Windows (XP or higher) and Macintosh (MacOS 7.5 or higher). The program has not been tested and is not supported on other operating systems such as Linux and Unix.

Internet Connection

IntelliGrants is a website designed for access via the Internet. For accessing IntelliGrants, minimum connection is by modem. For those using a modem, recommended connection speed is at least 33.6 kbps (kilobits per second). Internet connections “faster” than modem, i.e., cable, DSL, T1, wireless improve speed at which the system operates. In an office environment, you likely have an Internet connection, but if unsure, contact your network administrator.

Web Browser

This system was designed to be compatible with common up-to-date web browsers including Internet Explorer V.11 and above, Firefox, Chrome, and Safari.

Adobe Acrobat Reader

Adobe Acrobat Reader is used to view PDF (Portable Document Format) documents. The IntelliGrants system automatically generates grant documents in PDF format using information that is saved into various narrative and budget pages. With Adobe Acrobat Reader, users can view, print, or save PDF documents. You can download Adobe Acrobat Reader at www.adobe.com.

SUBGRANTEE USER ROLE TYPES

IntelliGrants uses roles to control what types of action each user can perform. The roles provide a measure of security by enabling only certain roles to access different tabs and perform different tasks. Depending on the assigned role, you may be able to create new accounts and perform other system administrator tasks, or you may be limited to simple tasks such as viewing only.

Once a new IntelliGrants system is set up, the SubGrantee Administrator should create a new account. Once that account is validated, the SubGrantee Administrator can select and enter the staff member names and applicable roles into IntelliGrants.

IntelliGrants has five types of SubGrantee security roles, and they are described in this section:

- SubGrantee Administrator
- SubGrantee Project Director
- SubGrantee Fiscal Agent
- SubGrantee Staff
- SubGrantee Viewer

NOTE: SubGrantee Administrator and SubGrantee Project Director share the same role responsibilities, **apart from some form view/save/add/delete options, status change options including adding other users to the organization.**

SubGrantee Administrator

- Creates new user accounts, and edits/deletes user account information.
- Views/checks statuses of and/or initiates Applications/Grants, Program Reports, and Fiscal Reports.
- Enters/updates information/attachments on Applications/Grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports, and Fiscal Reports.
- Submits Applications/Grants, Program Reports, and Fiscal Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.

SubGrantee Project Director

- Creates new user accounts and edits/deletes user account information.
- Views/checks statuses of and/or initiates Applications/Grants, Program Reports, and Fiscal Reports.
- Enters/updates information/attachments on Applications/Grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports, and Fiscal Reports.
- Submits Applications/Grants, Program Reports, and Fiscal Reports.
- Manages the Organization Documents, Organization Accounts, and Organization Document Availability sections.

SubGrantee Fiscal Agent

- Views/checks statuses of Applications/Grants, Program Reports, and Fiscal Reports.
- Enters/updates information/attachments on Applications/Grants, Program Reports, and Fiscal Reports.
- Downloads attachments from Applications/Grants, Program Reports, and Fiscal Reports.
- Signs Grant Contracts.

SubGrantee Staff

- Views/checks statuses of Applications/Grants, Program Reports, and Fiscal Reports.
- Enters/updates information/attachments on Applications/Grants, Program Reports, and Fiscal Reports.

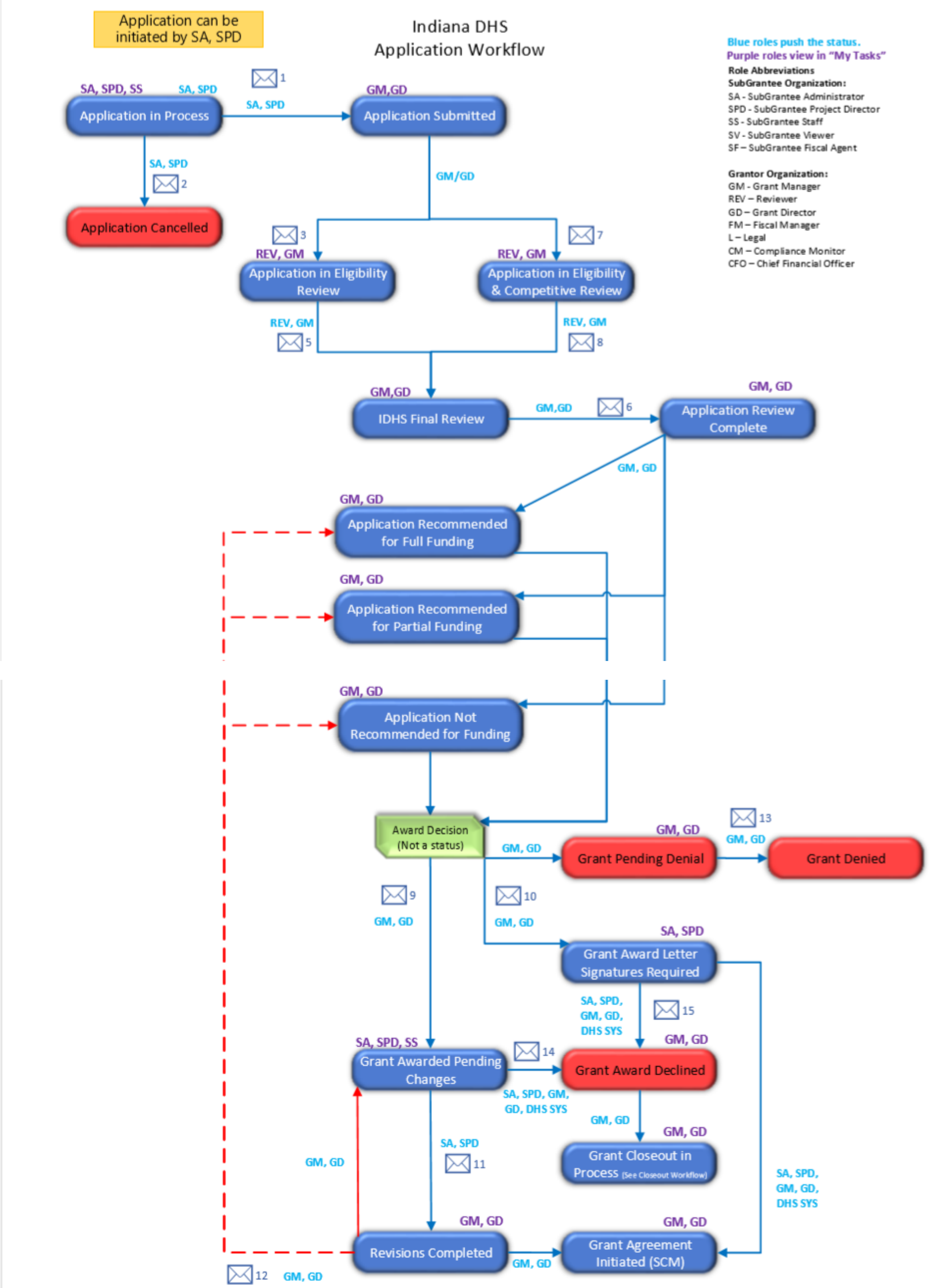
- Downloads attachments from Applications/Grants, Program Reports, and Fiscal Reports.

SubGrantee Viewer

- Views Applications/Grants, Program Reports, and Fiscal Reports.

Please note: IDHS refers to the organization administrator's role as the SubGrantee Administrator, to remain consistent with the terminology used within grants managed by IDHS. When logged into the IntelliGrants system as the SubGrantee Administrator, the system will refer to this role as a SubGrantee Administrator. The term SubGrantee is at the enterprise level and is used globally within the State of Indiana for all five user roles; SubGrantee Administrator, SubGrantee Project Director, SubGrantee Viewer, SubGrantee Staff and SubGrantee Fiscal Agent.

Application Workflow



Account Set Up and Access IntelliGrants

How to access IntelliGrants:

- Obtain access from the organization’s SubGrantee Administrator. You can do this when an organization already has an IntelliGrants account. This method is the preferred way, because it is quicker and provides greater security for the organization’s records.

Set Up Account

There are two ways to access IntelliGrants:

1. Request access to IntelliGrants via the **IntelliGrants Login** page. You must be approved by a DHS IntelliGrants system administrator.

-OR-

2. When an organization already has an IntelliGrants account, obtain access from the organization’s SubGrantee Administrator. This is the preferred way to access IntelliGrants – it is quicker and provides greater security for the organization’s records.

SubGrantee Administrator Access

To gain access to IntelliGrants as a *SubGrantee Administrator*, first create a new user account. From the IntelliGrants login page select “New User” located in the **Login** section (see Figure 2).

Note: if you are already registered as an *IntelliGrants Subrecipient*, please use that login information to access the system. You do not need two accounts.

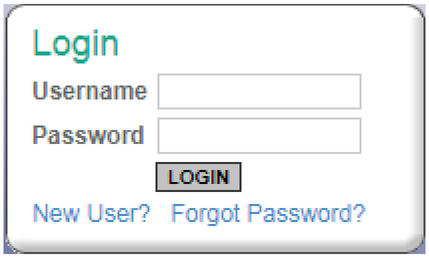


Figure 1: IntelliGrants Login

1. Complete the **Contact Information** as required. All items marked with an * are required.
    a. The “Username” field must consist of letters and/or numbers.
    b. The “Password” must contain at least 1 upper case letter, at least 1 number and must be at least 7 characters long.
    c. The fields “Password” and “Confirm Password” must match.
    d. Special characters are allowed in the password.
2. Select ***SAVE*** when complete.

After saving the new user information, the account will be validated by a *DHS IntelliGrants System Administrator*. If attempting to access the system before validation, the following message will appear:

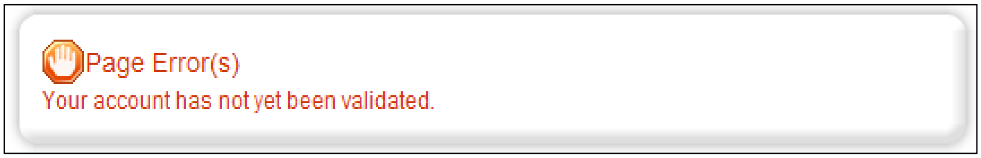


Figure 2: Account Validation Error

When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as a *SubGrantee Administrator*, the user will now be able to create additional user accounts for the organization.

Note: Users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user's activation date, a *SubGrantee Project Director/SubGrantee Administrator* must assign the user to each individual document using the ***Add/Edit People*** option located within each document. On the document's main menu under the **Management Tools** menu, select ***Management Tools***, then select ***Add/Edit People***.
The preferred method for gaining access to IntelliGrants is to have the organization's *SubGrantee Administrator* add new users to the system.
To add a staff person to an organization:

1. Select the ***Organization(s)*** link.
2. Select the ***Organization Members*** link.
3. Select the ***Add Members*** link.

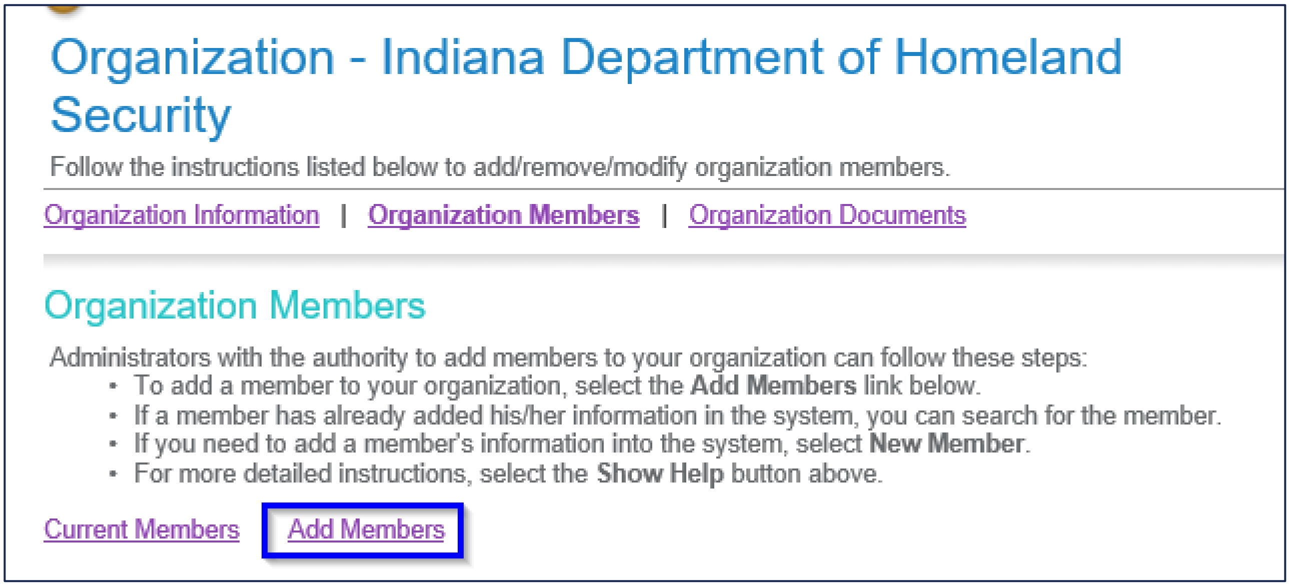


Figure 3: Organization Information

4. Enter the first/last name of the person to add and select ***SEARCH.*** The search results will list below filtered by the search criteria entered.

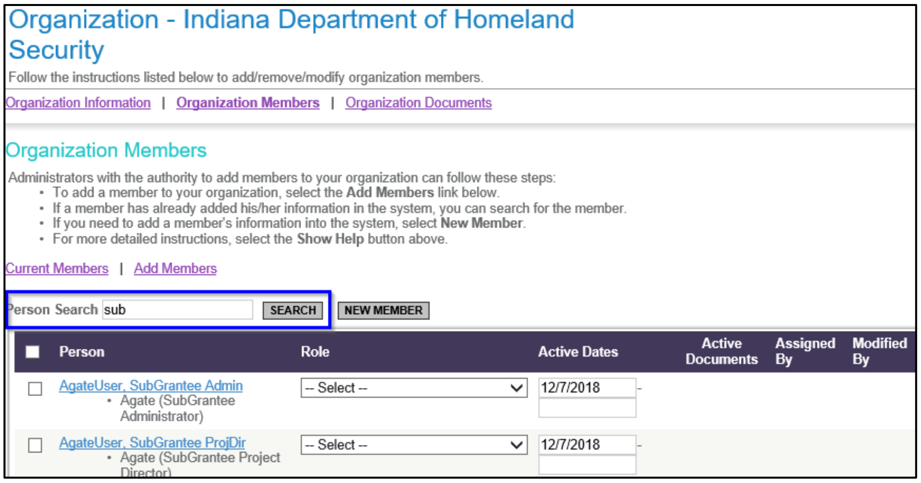


Figure 4: Member Search Results

5. Select the checkbox next to the person to add. Select a role, enter an active date (beginning). Select ***SAVE***. Then select the ***Current Members*** link and confirm that the person added and listed with the rest of the organization's member names.

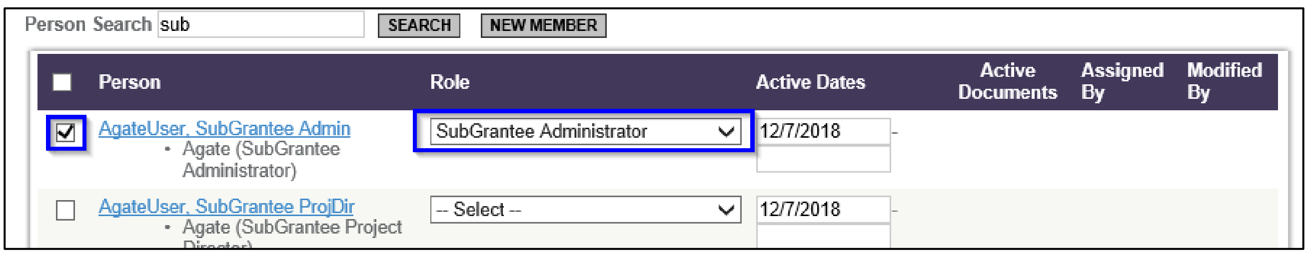


Figure 5: User Selection

6. If the person's name does not return in the **Search Results**, then select ***NEW MEMBER***.

Figure 6: New Member Button

7. Complete the information for the new user and select ***SAVE & ADD TO ORGANIZATION***.

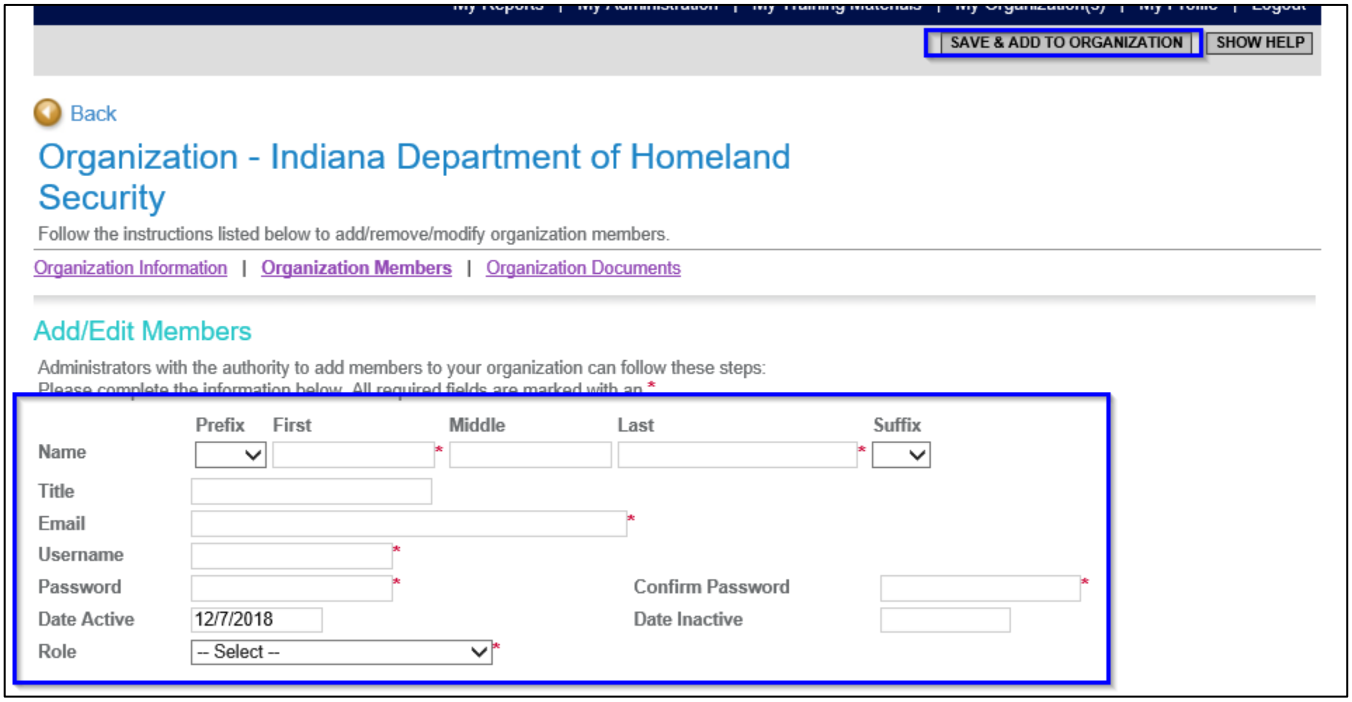
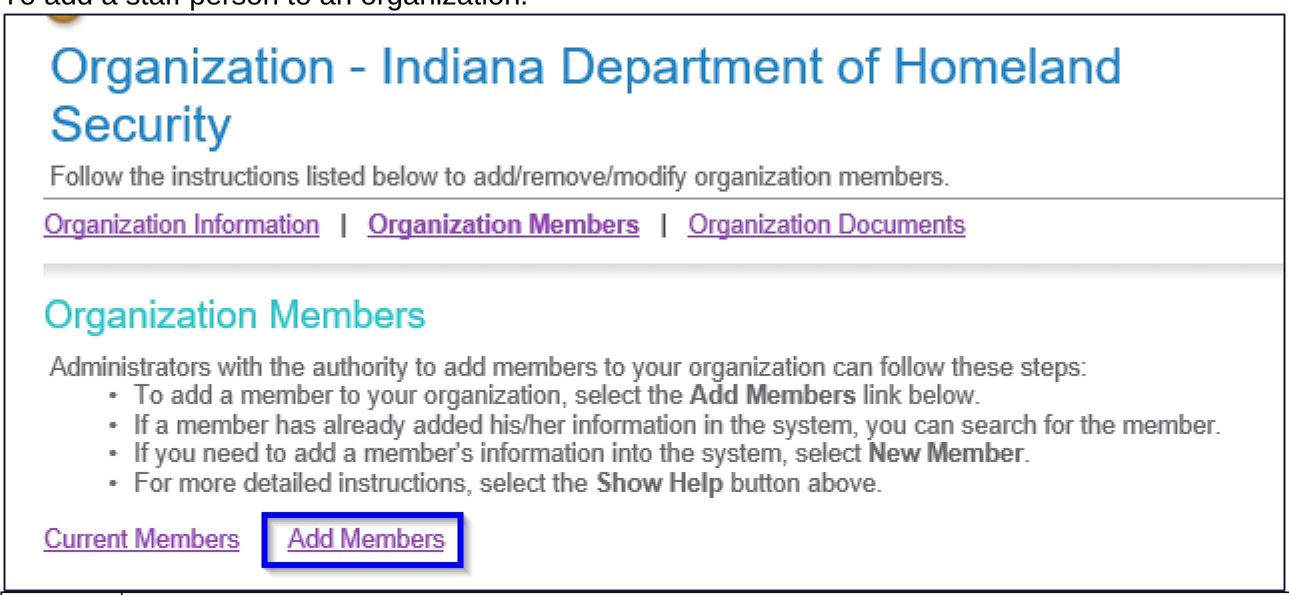


Figure 7: New User Information

Adding a new IntelliGrants user to your organization

To gain access to IntelliGrants the organization's SubGrantee Administrator must add new users to the system.

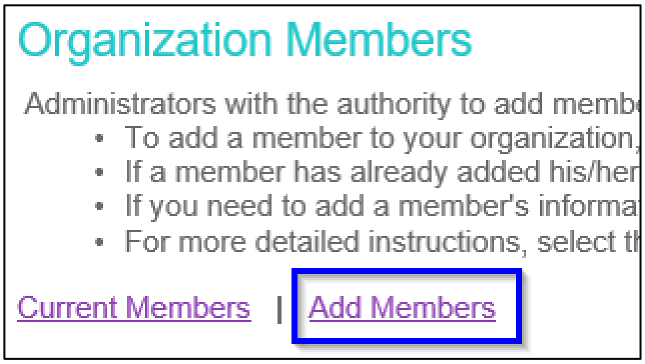
To add a staff person to an organization:



Step	Description
1	Select the **My Organization(s)** link.
2	Select the **Organization Members** link.

3	Select the **Add Members** link.
4	To **ADD** a new organization member that is not currently an IntelliGrants user: 1. Select the **NEW MEMBER** button. 2. Enter the new member contact information. **Notes:** • All fields marked with an * are required. • The Username field must consist of letters and/or numbers. • The password must contain at least 1 upper case letter, at least 1 number and must be at least 8 characters long. You can include special characters in the password. • The Password and Confirm Password entries must match. • Select the appropriate role from the drop-down list. See "SubGrantee User Types" on page 5 for an explanation of roles. The role affects what the user can view and do in the program. 3. Select the **SAVE & ADD TO ORGANIZATION** button. 4. The SubGrantee Administrator must notify the new user of the username and password that was assigned when creating the account. 5. New users are required to change their password upon the first login.
5	To confirm the person has been added, select the **Current Members** link. If the person was successfully added, the new member will be listed with the rest of the organization members.

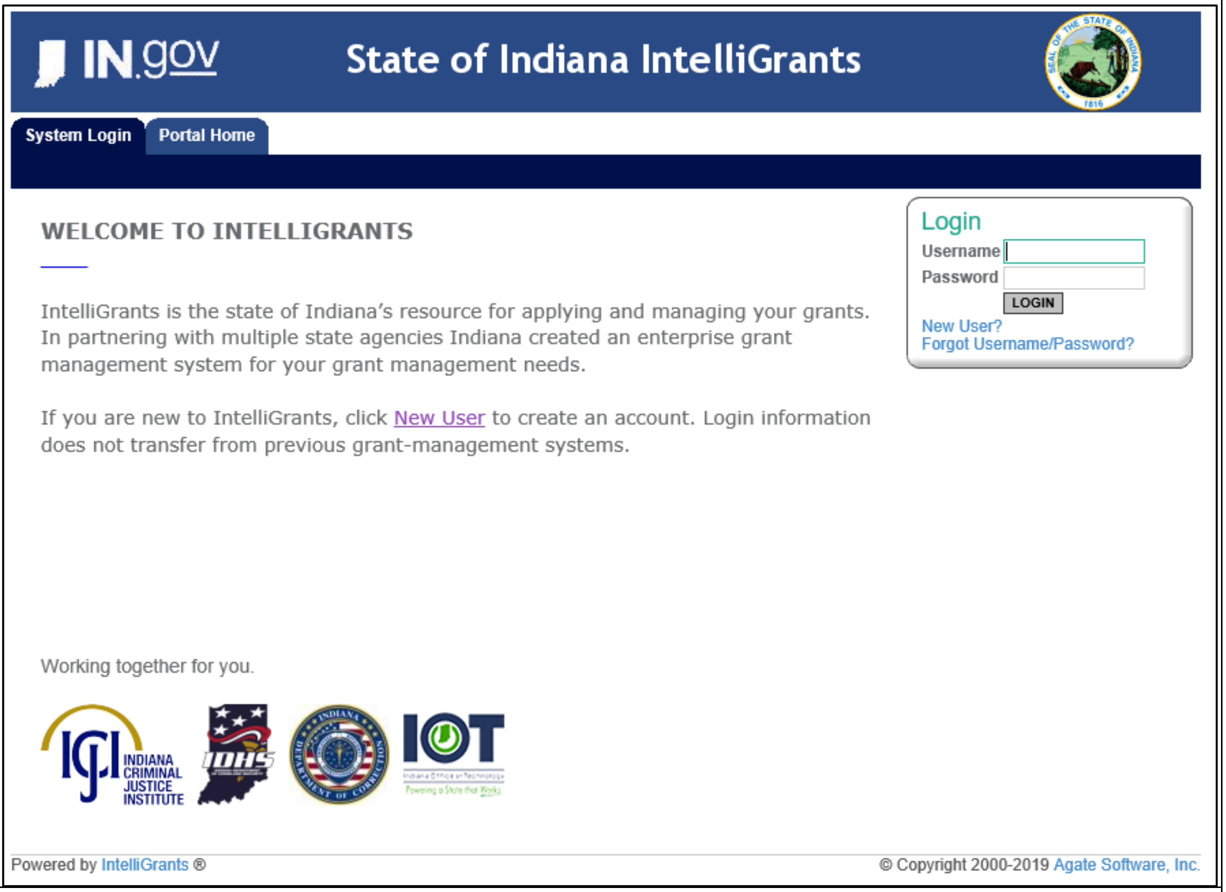
Adding an existing IntelliGrants user to your organization:

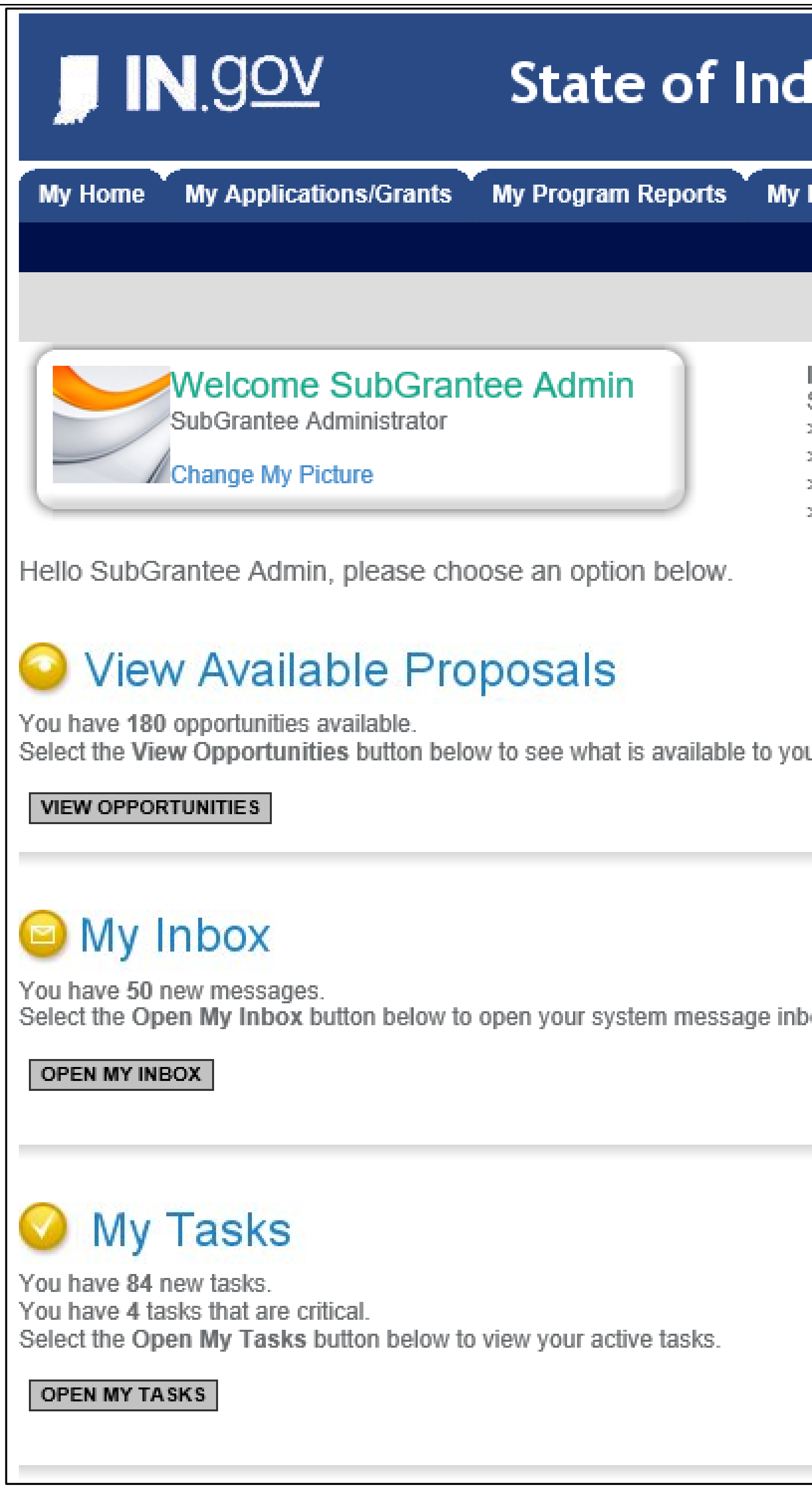
Step	Description
1	Select the **My Organization(s)** link.
2	Select the **Organization Members** link.
3	Select the **Add Members** link. 
4	Enter the first/last name of the individual and click the **SEARCH** button. If the user is already in the system, you will see results of any matching names. **ADD** the organization member by doing the following: 1. Select the checkbox next to the person you want to add. 2. Select a role from the **Role** drop-down list. See "SubGrantee User Types" on page 5 for an explanation of roles. The role affects what the user can view and do within the program.

	3. Select the **SAVE** button. If the new member is not part of the organization member list and does not appear in the search results, use the instructions above to add the individual to the IntelliGrants system. 4. The SubGrantee Administrator must notify the new user of the username and password that was assigned when creating the account. 5. New users are required to change their password upon the first login.
5	To confirm, select the **Current Members** link. If the person was successfully added, the new member will be listed with the rest of the organization members.

Access IntelliGrants

To access the IntelliGrants site, follow these steps:

Step	Description
1	Type http://intelligrants.in.gov into the address bar of a web browser. You see the Login screen. 
2	Type your username and password and select **LOGIN**. You see the **My Home** page



Note: IntelliGrants does not save the username and password. This option *may* be available with some web browsers.

Add IntelliGrants to Favorites List

To access IntelliGrants quickly, add it to the Favorites menu by following these steps:

Step	Description
1	In Internet Explorer, open the **Favorites** menu from the toolbar and then select **Add to Favorites.**
2	To change the default name, type the new name.
3	Select **Add**.

Note: If using a different browser, add it as a bookmark (for instance, in Chrome).

Add IntelliGrants to List of Trusted Sites

Adding the IDHS IntelliGrants website to the list of trusted sites will help minimize any issues accessing/browsing the site. Follow these steps in Internet Explorer:

Step	Description
1	Select **Tools** and the **Internet Options**.
2	Select the **Security** tab.
3	Select the **Trusted Sites** icon, then select the **Sites** button.
4	Enter http://intelligrants.in.gov in the **Add this website to the zone** field and select the **Add** button.
5	Select the **Close** button, then select **OK**.

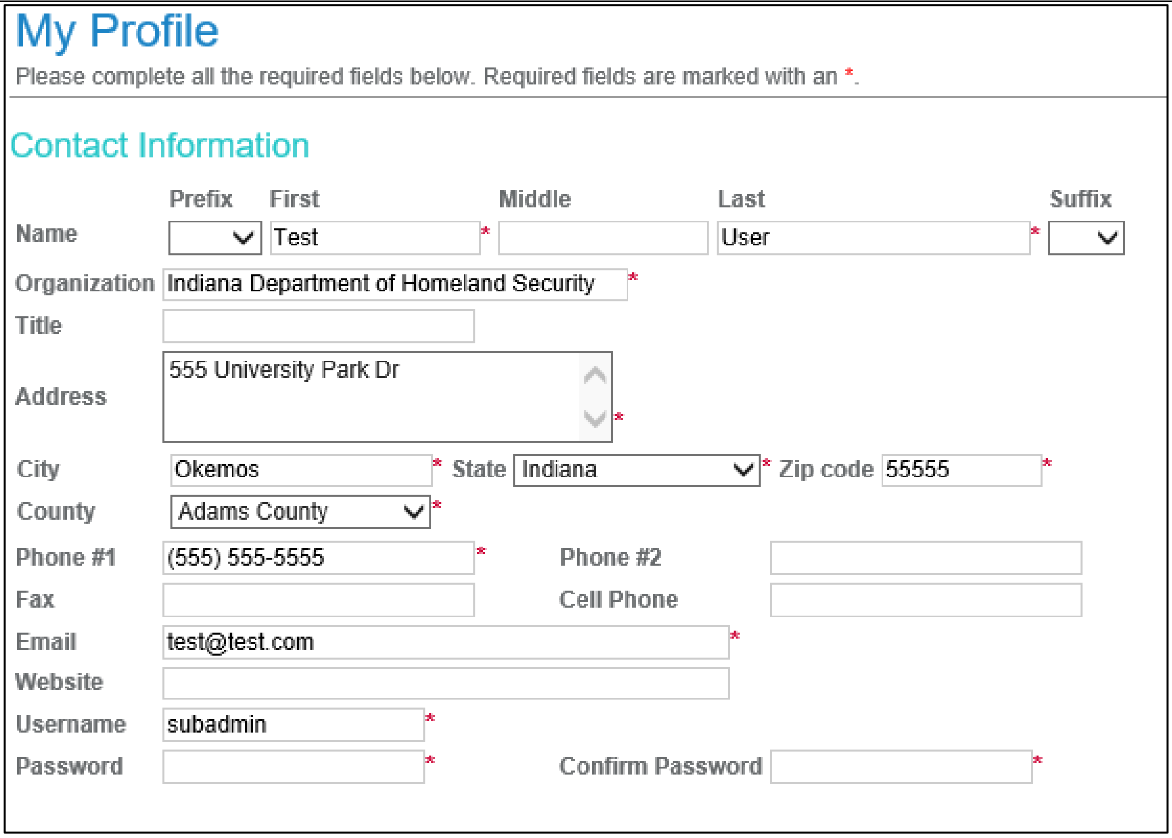
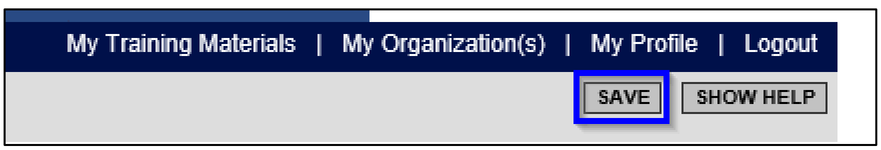
Update Your User Profile

You should keep your contact information up to date so that IDHS staff members can easily contact users when a need arises. Having accurate contact information is especially important for timely messaging because IntelliGrants sends system messages to the email address in the user profile. If the email is incorrect, you will not receive the automatic notifications. Also, if you forget a password, the email you provide must match the one in the user profile so that you can reset the password.

Note: User profiles are specific to each user and should only be modified by the Person on the account.

To update your profile, follow these steps:

Step	Description
1	**Go to the My Home page in IntelliGrants.**
2	Click the **My Profile** link.
3	Make any changes to update the information.

	
4	Select **SAVE** located in the top right. 

Update Organization Information

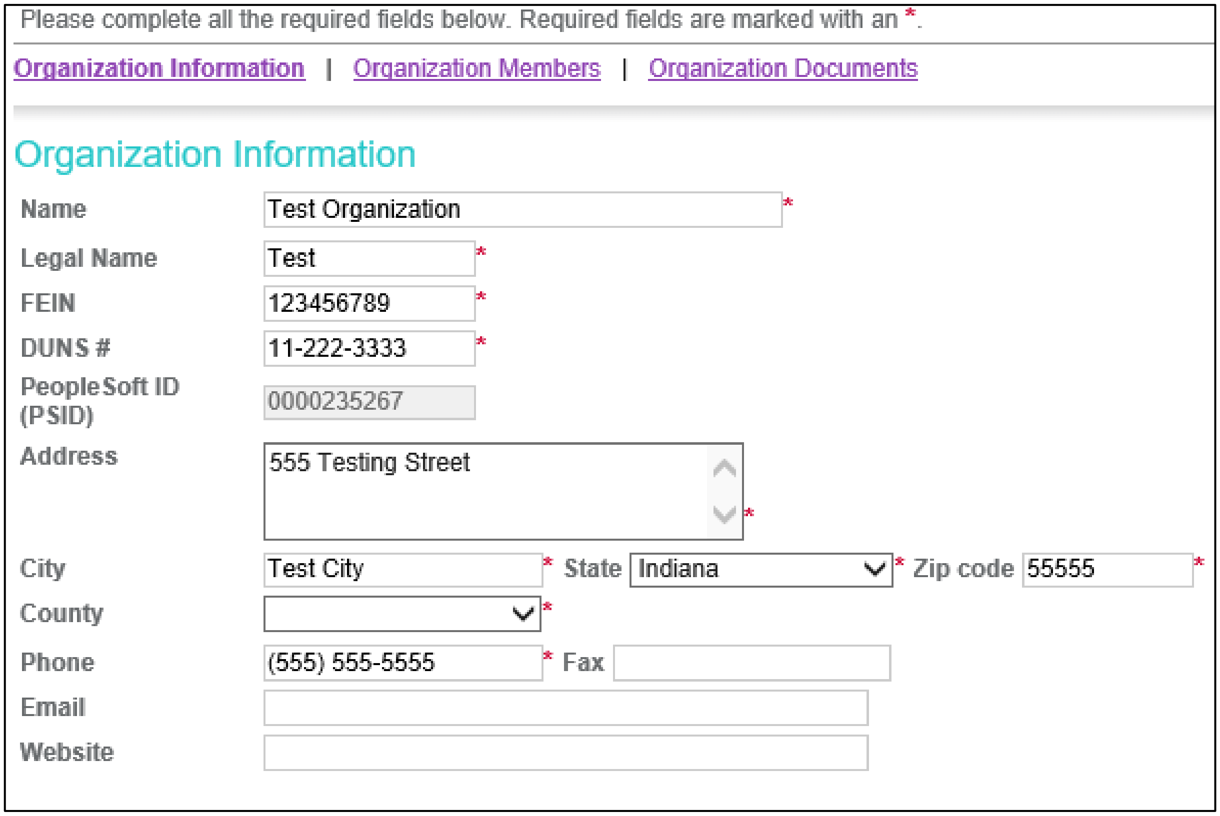
You should update the system with the organization's most current and accurate information.

Follow these steps:

NOTE: The SubGrantee Administrator is the only role able to edit Organization Information.

Step	Description
1	Select the **My Organization(s)** link and then select the organization to update.

2 Select the **Organization Information** link.

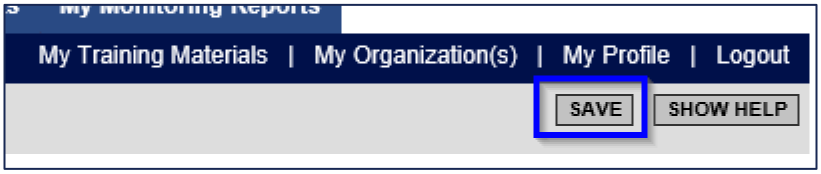


3 Make any changes.

Notes:

- All fields marked with an * are required.
- You may need to refer to other resources to enter specific information – for instance, the Federal Employer Information Number (FEIN) or the Dun and Bradstreet number (DUNS) if unknown
- The SubGrantee Administrator is the only role able to edit the Organization Information

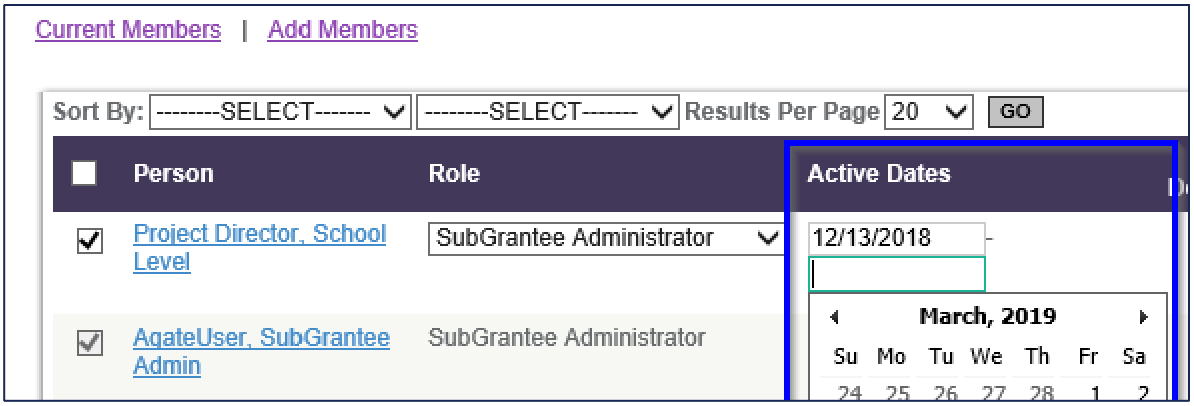
4 Select **SAVE** in the top right to save the organization information.



Deactivating a User

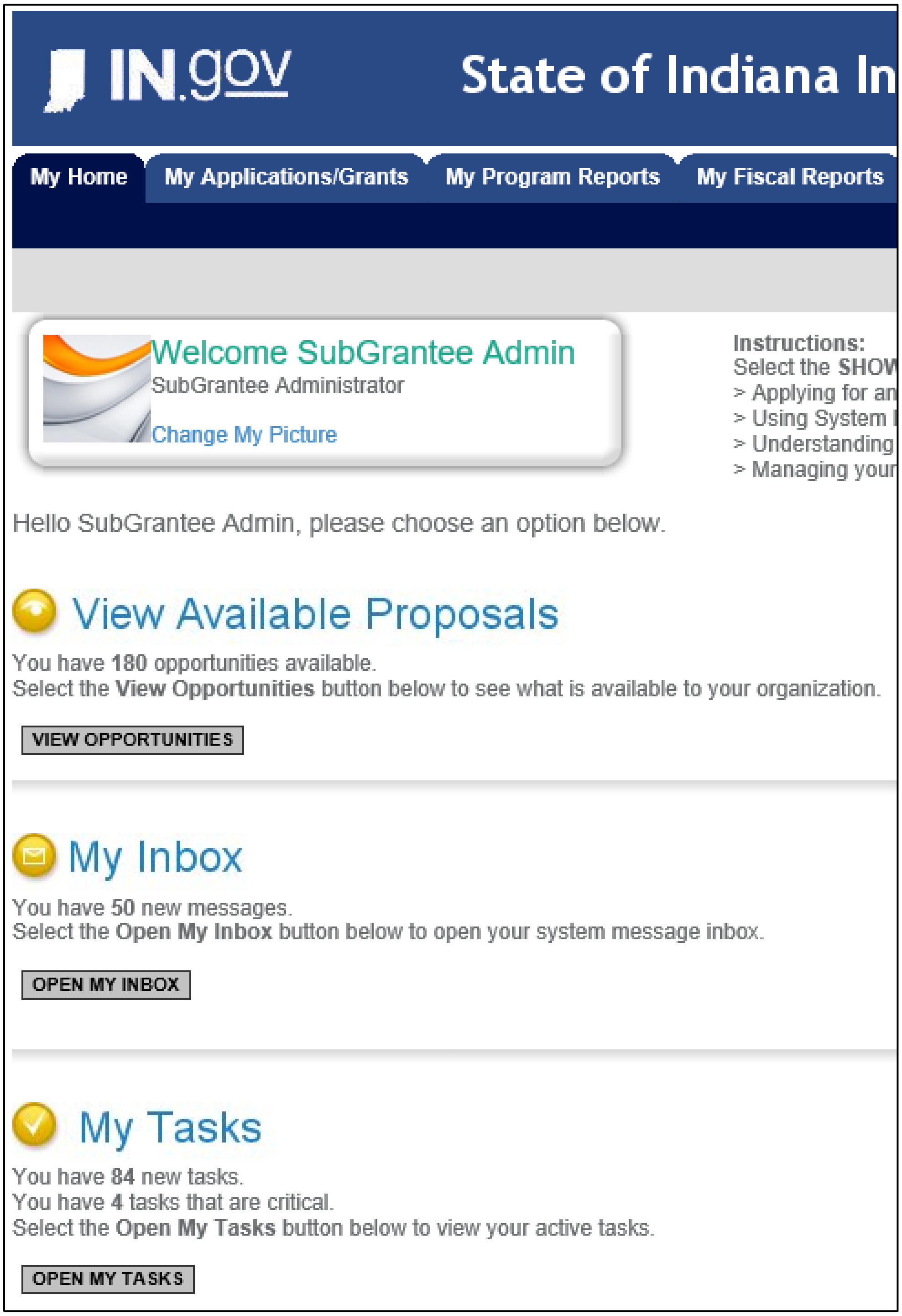
A SubGrantee Administrator can deactivate a member of his/her organization. A deactivated user cannot access or edit proposal-related information.

To deactivate a user:

Step	Description
1	Select the **My Organization(s)** link.
2	Select the **Organization Members** link.
3	Using the drop-down calendar, set the second Active Dates field to the date on which the user will no longer have access. Select **SAVE**. 

NAVIGATE INTELLIGRANTS

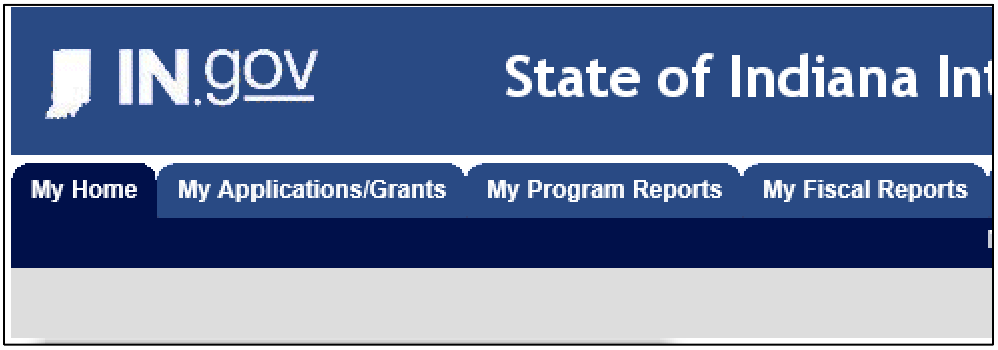
From the **My Home** page, you can access all types of documents, such as application /grants, contract information, forms, reports, e-mail/messages, user information, system information, etc.



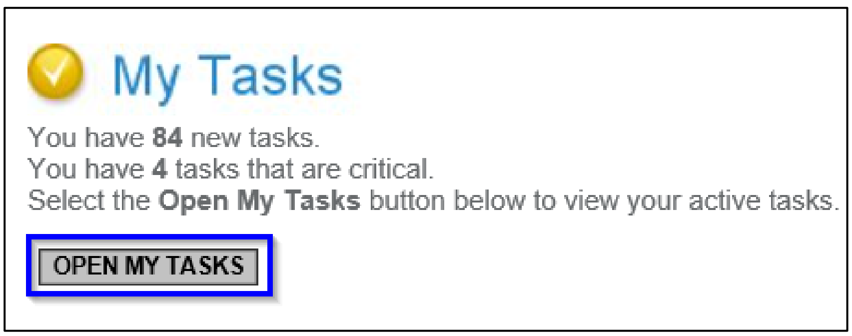
Note: What you see on your home page depends on the role you are assigned as a user and whether you have been assigned to any documents. Your SubGrantee Administrator can enable you to access documents. Check with that individual if you need access to specific content. For instance, only SubGrantee Administrators and SubGrantee Project Directors can view opportunities (under **View Available Proposals**).

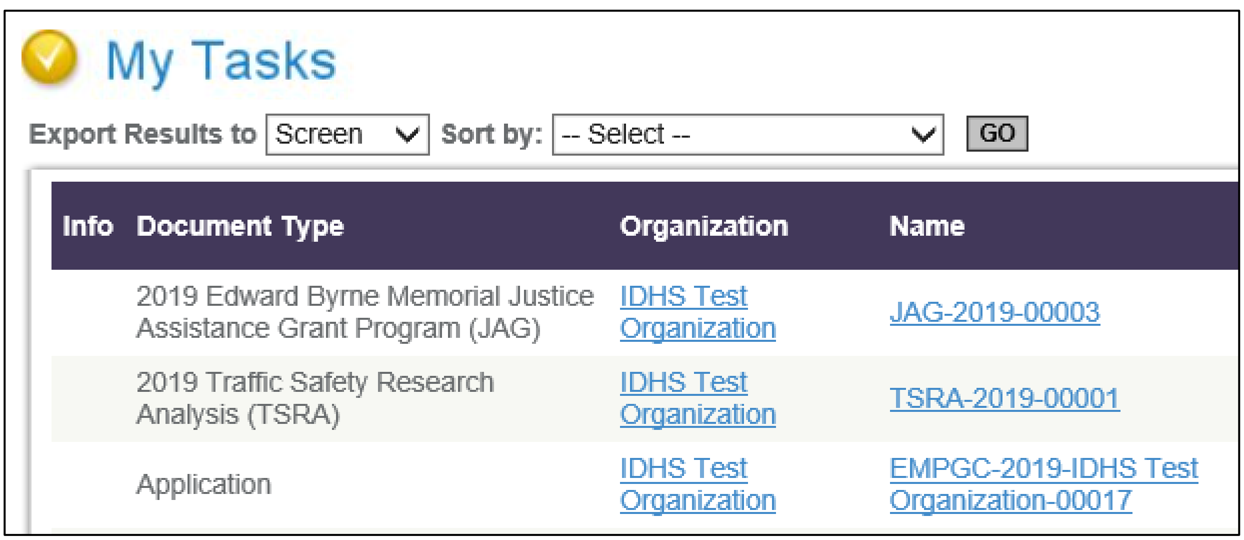
The following guidelines describe how to navigate through IntelliGrants:

- You see tabs for **My Home** page, **My Applications/Grants** page, **My Program Reports** page, and **My Fiscal Reports** page along the top of the screen. You can select the tab to go to that area. User access to these tabs is dependent on the security settings of that user (the type of role assigned to the user).



- To navigate back to the homepage, select **My Home**.
- On the **My Home** Page, you see sections for **View Available Proposals**, **My Inbox**, and **My Tasks**. If you have content for these sections, you see the number of items listed under the section heading. You can select the button to view the details. For instance, to view your tasks, select the **OPEN MY TASKS** button.

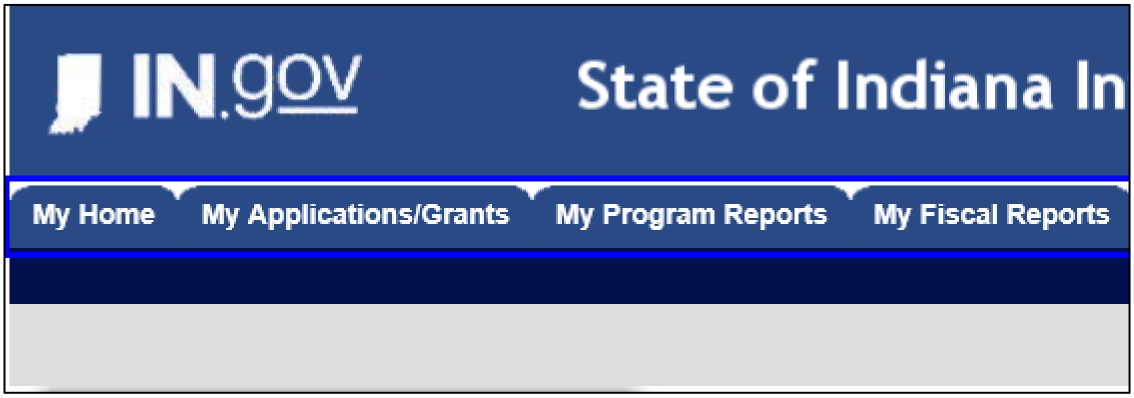




- If you do not have any relevant documents for that section—for instance, no email messages, you will not see the My Inbox section.

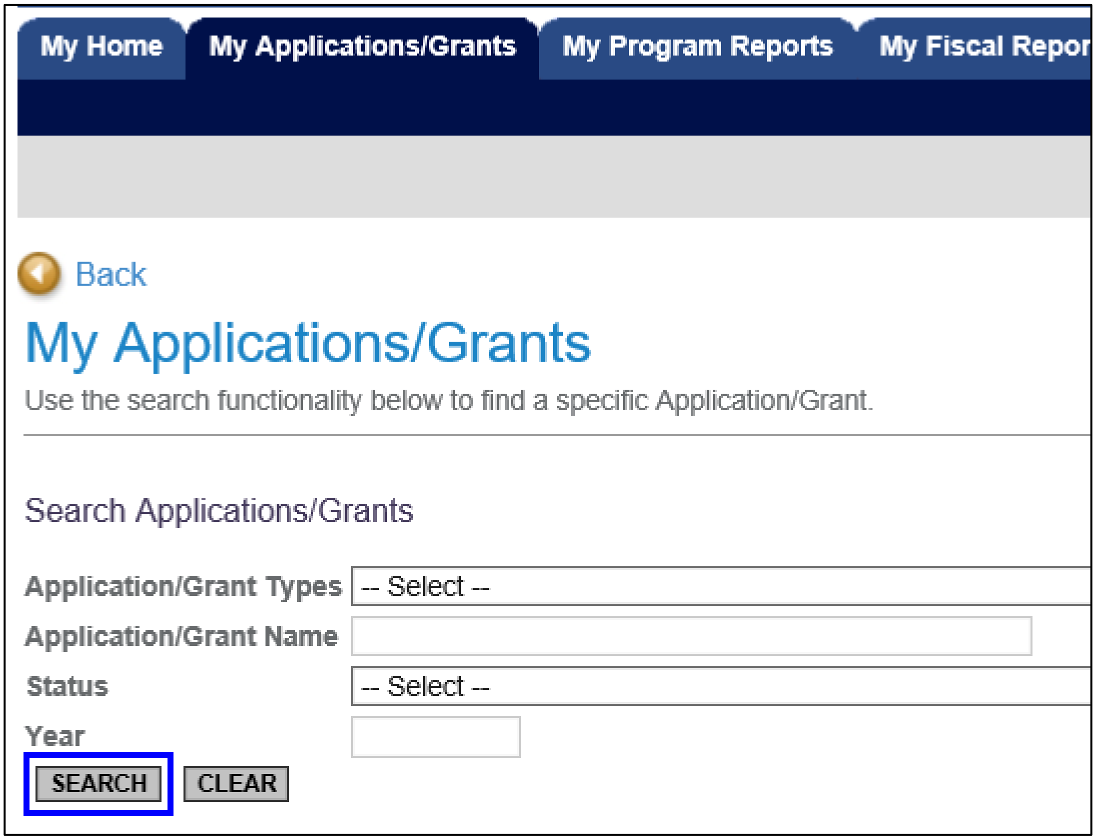
OPEN A DOCUMENT

If you want to view an application or report, select one of the tabs for **My Applications/Grants**, **My Program Reports**, or **My Fiscal Reports**.



Browse Documents

Select **SEARCH** without entering any search criteria to generate a list of available documents. You will see a list of available documents. You can browse through the list and select the link in the **Name** column to open any of the listed documents.



Search for a Document

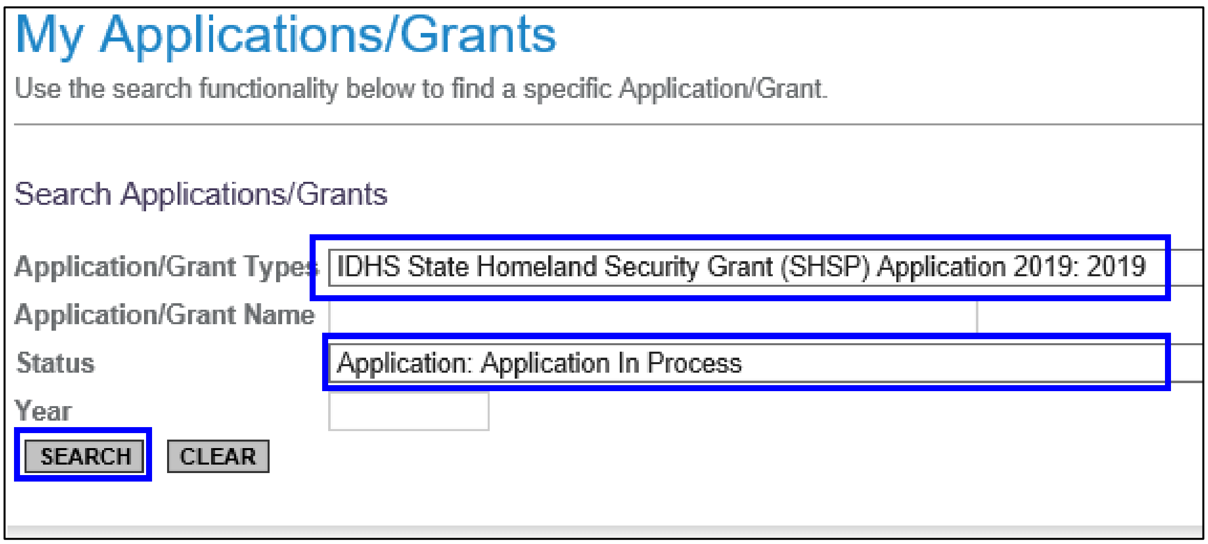
The **My Applications/Grants**, **My Program Reports**, and **My Fiscal Reports** are available to navigate to a document, or search for a specific document. To search for a specific document, follow these steps:

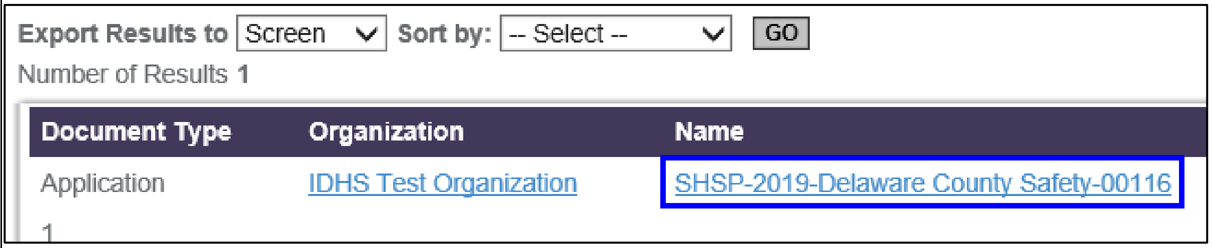
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Select the type of document to search. For example, to search for applications, select My Applications/Grants.


</td></tr>
<tr><td>2</td><td>Do any of the following:

Display the Application/Grant Types drop-down list and select the type of application/grant.

Type the first few characters or the complete application/grant name in the Application/Grant Name field.

Display the Status drop-down list and select the status of the document. For example, select Application in Process.


Enter the year for the application/grant in the Year field.</td></tr>
<tr><td>3</td><td>Select the SEARCH button.


You will see any matching documents in the search results. You select the link in the Name column to open the document.</td></tr>
</table>

HANDLE EMAIL MESSAGES

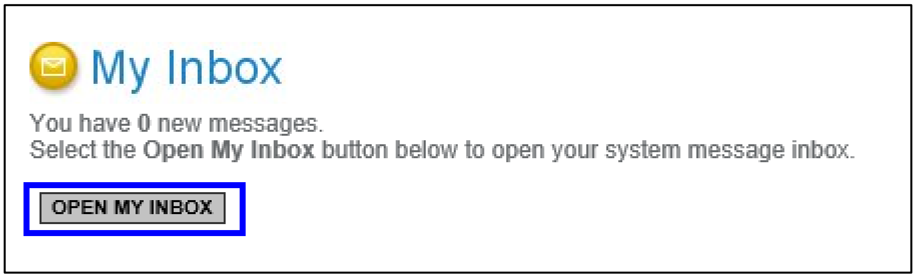
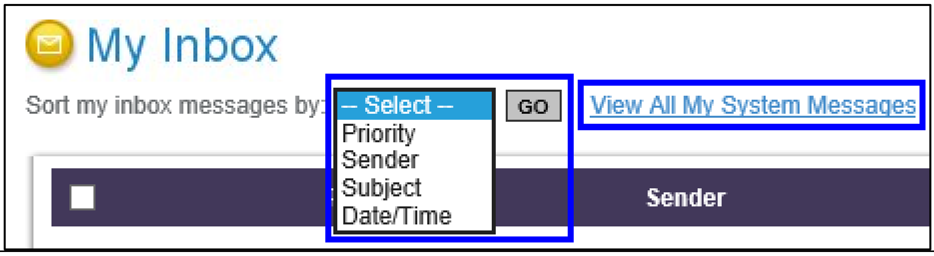
When an email is sent to the email address in your user profile, IntelliGrants sends the email to your regular inbox and displays the message in the **My Inbox** section of your home page. For instance, you may receive an email confirming when you submit an application or alerting you when an application is denied or approved. These emails often prompt you when a certain task requires action.

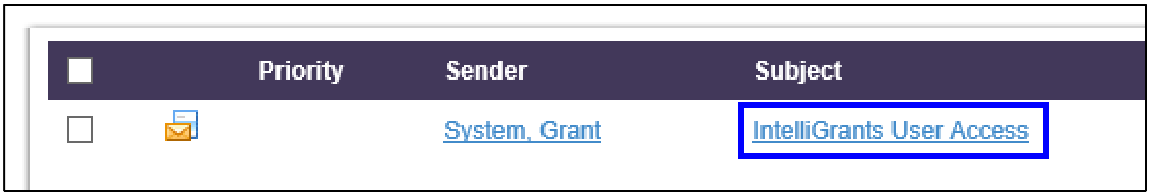
> **Caution:** To ensure that you receive timely messages, make sure that the email address in your user profile is correct. See Update Your User Profile if you need to verify or make any changes.

View Your Email Messages

When you have email messages, you will see the number of messages and be able to access your inbox from your home page.

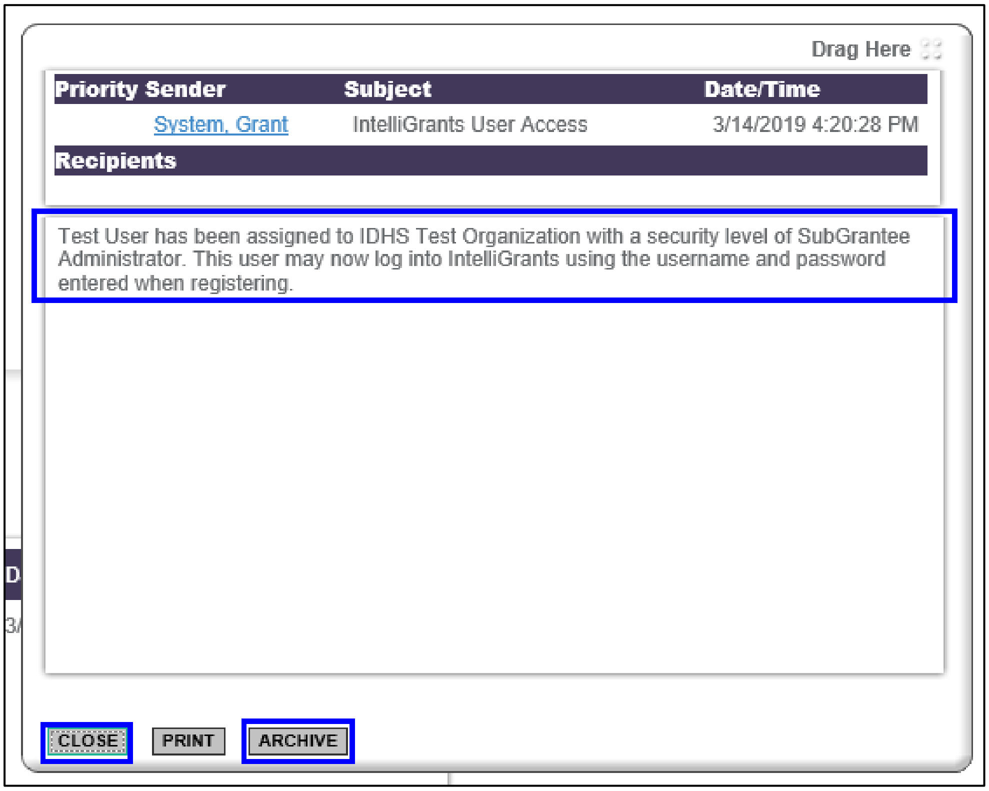
Follow these steps to view your email messages:

Step	Description
1	In the **My Inbox** section, click the **OPEN MY INBOX** button. 
2	Do any of the following to display your messages: • Display the **Sort my inbox messages by** drop-down list, select a sort order, and click the **GO** button to view a sorted list of messages. You can sort by priority, sender, subject, or date/time. • To view the messages, select **View All My System Messages**. • To view a message, select the link in the **Subject** column. 

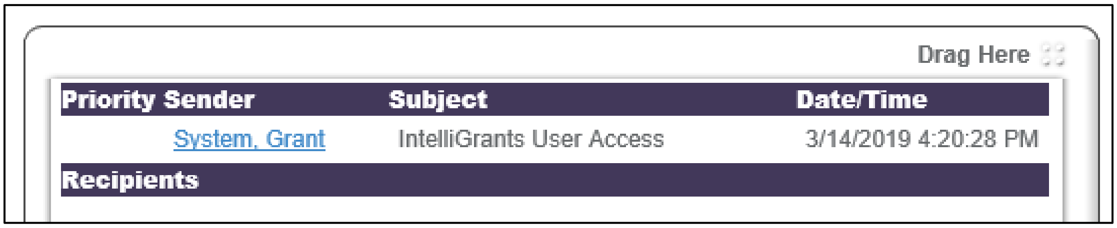
<table>
<tr><td></td><td>


Note: You can mark a message as read or archive a message. To do so, select the checkbox next to the message and then select **MARK CHECKED AS READ** or **MARK CHECKED AS ARCHIVED**.
</td></tr>
<tr><td>3</td><td>
After reviewing the message, do any of the following:

- Close the message by selecting **CLOSE** in the bottom left corner of the message.



- Select the **ARCHIVE** button to archive the message.
- Select the **Sender** name to reply to the message.

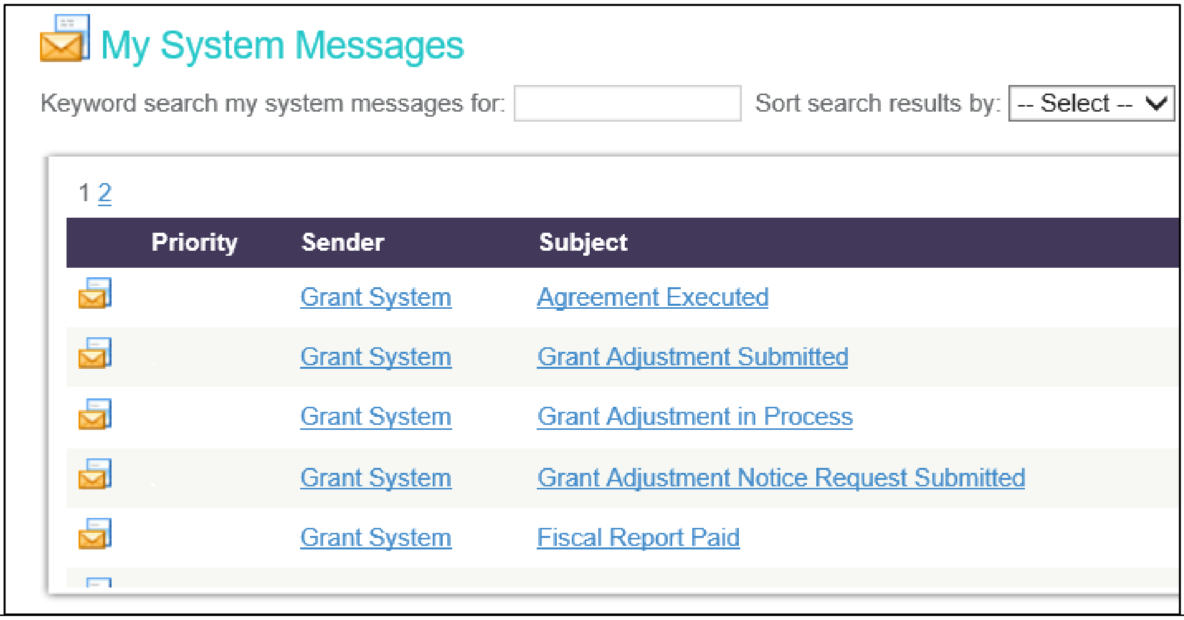


</td></tr>
</table>

Search for Email Messages

To search for a message, follow these steps:

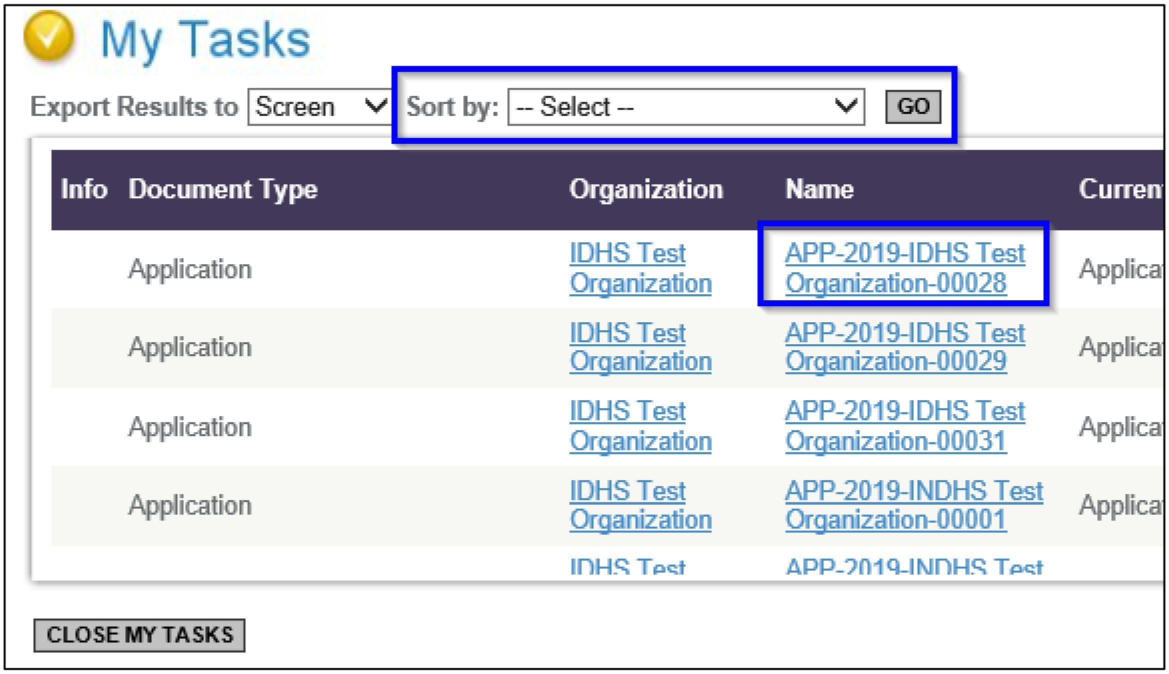
Step	Description
1	Select **View All My System Messages**.
2	Enter a keyword of the message, included in either the subject or the contents of the message in which to search and then click **SEARCH**.



COMPLETE TASKS

If you see the **My Tasks** section on your home page, you have tasks that require action. The number of new tasks and critical tasks are listed.

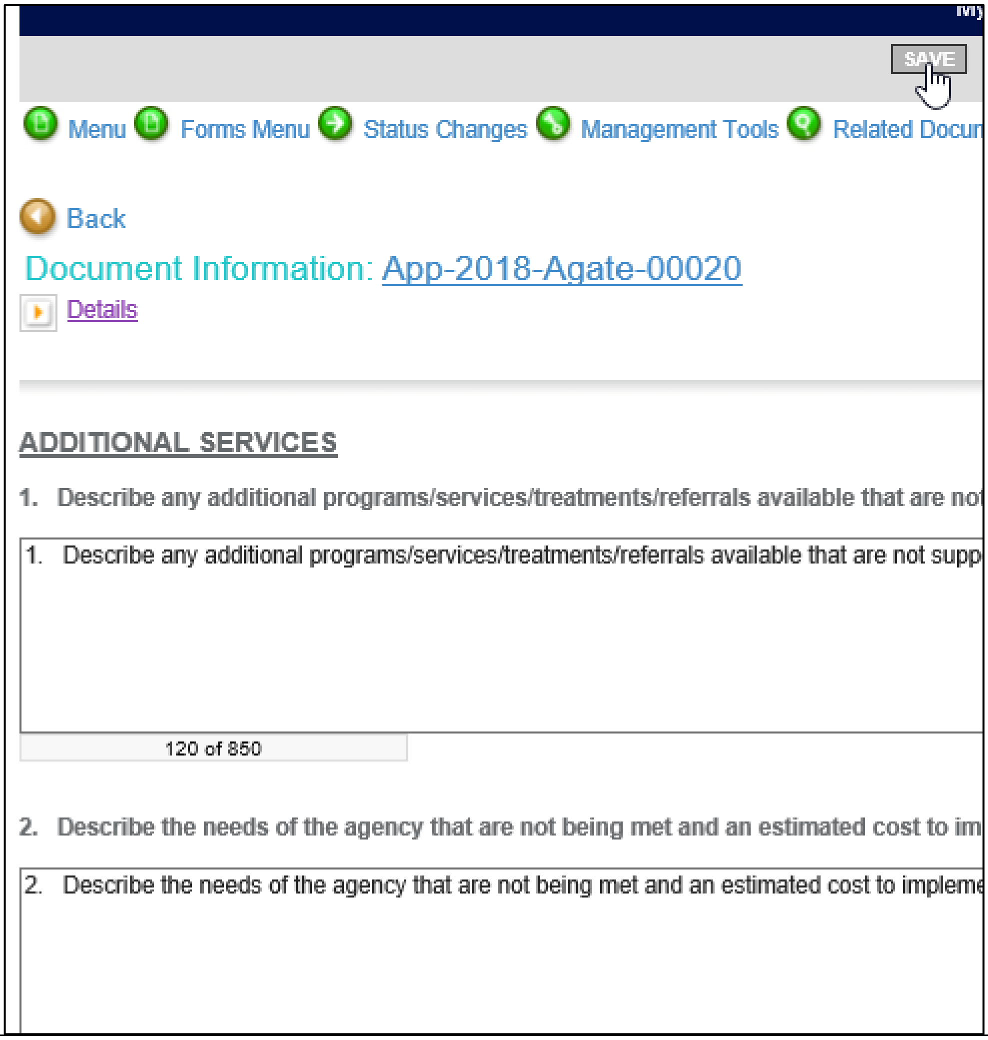
You can display and complete your tasks by doing the following:

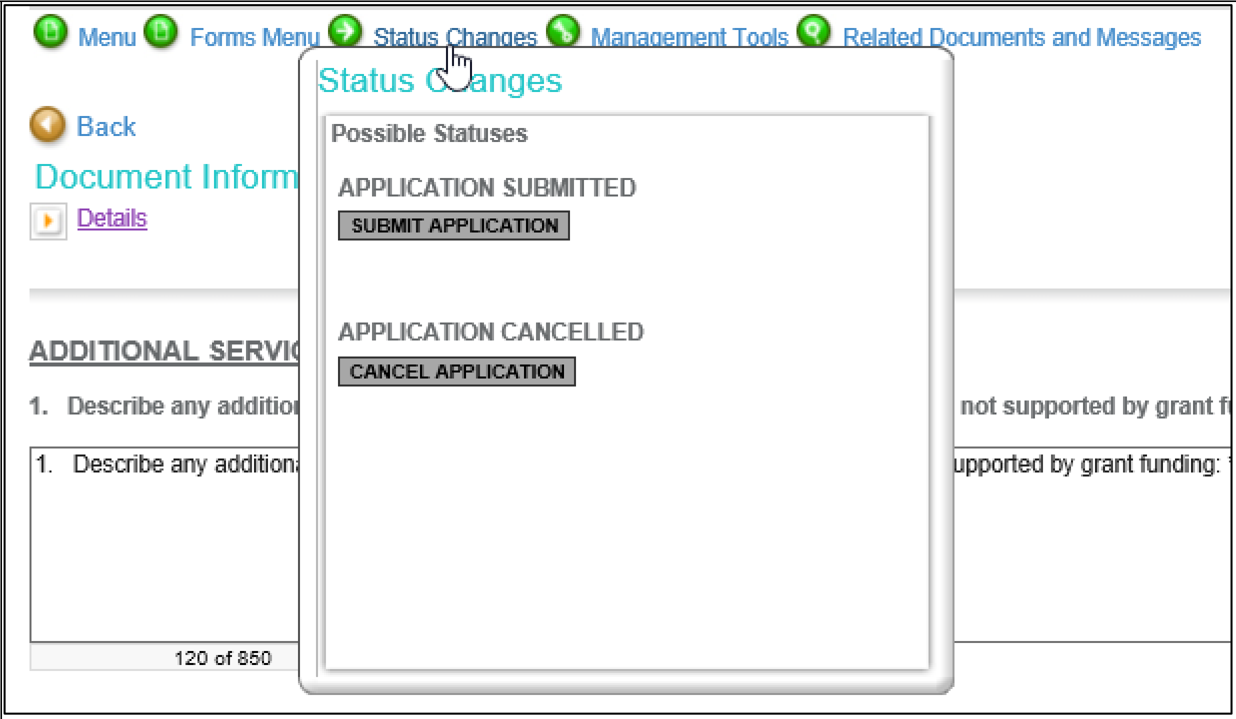
<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Select the OPEN MY TASKS button.</td></tr>
<tr><td>2</td><td>To open a document or form to edit data, select the document name in the Name column.

</td></tr>
</table>

3

Complete the task and **SAVE** the page in the application form

Examples of tasks that would need to be completed include updating a form, changing the status of the application, or reviewing a form:



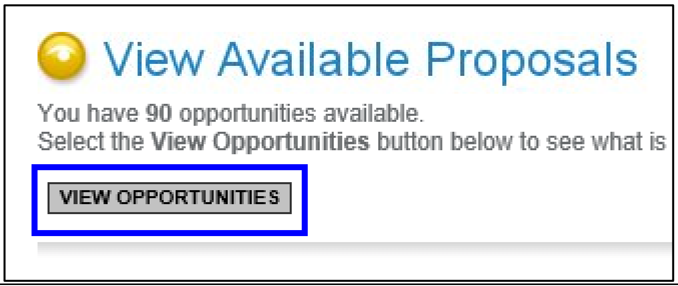
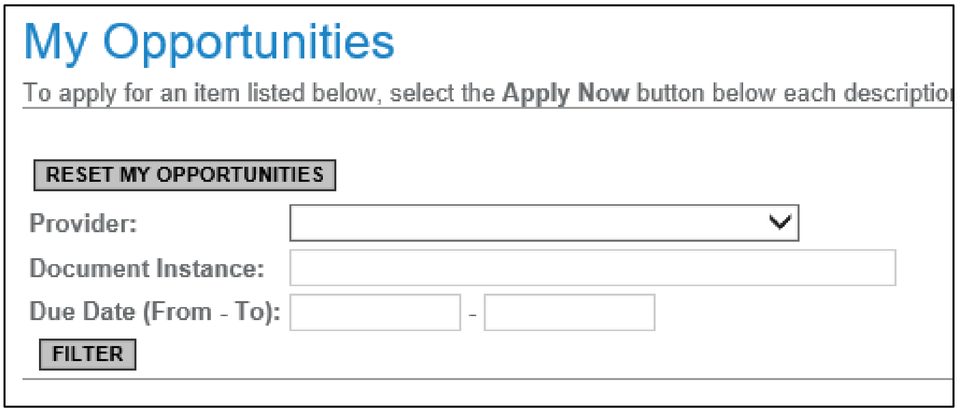

Menu
Forms Menu
Status Changes
Management Tools
Related Documents and Messages
Status Changes
Back
Document Inform
Details
Possible Statuses
APPLICATION SUBMITTED
SUBMIT APPLICATION
APPLICATION CANCELLED
CANCEL APPLICATION
ADDITIONAL SERVIC
1. Describe any additior
not supported by grant f
1. Describe any addition
upported by grant funding:
120 of 850

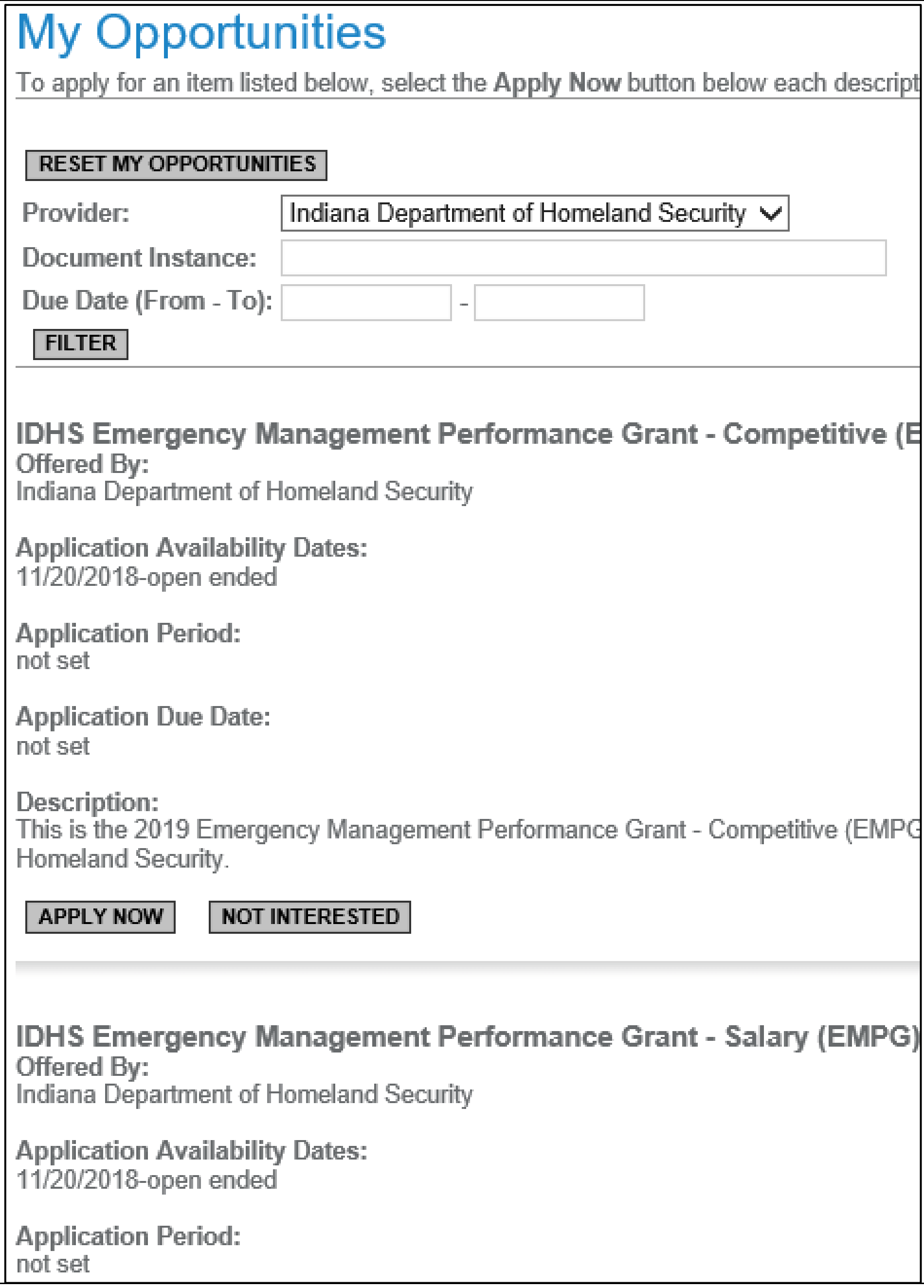
COMPLETE APPLICATION/GRANT

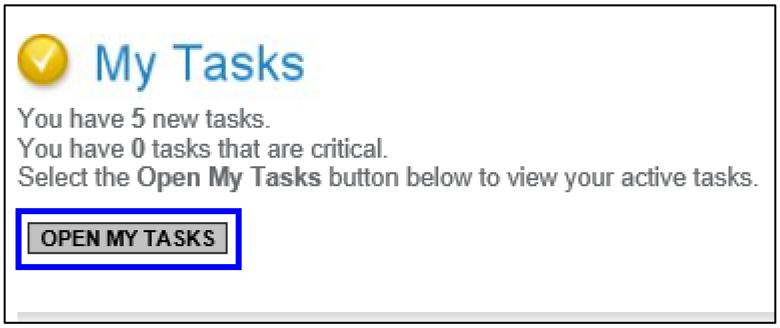
The SubGrantee Administrator and SubGrantee Project Director are the only roles authorized to initiate an application. These roles include the users who will complete and submit the application.

Initiate an Application

To initiate an application, follow these steps:

Step	Description
1	Select **My Home**.
2	Select **VIEW OPPORTUNITIES** in the **View Available Proposals** section. 
3	Filter the list of available opportunities by doing any of the following: • To filter by a provider, display the **Provider** drop-down list and select the provider. • To filter by due dates, enter the beginning and end date for opportunities from the **Due Date** fields.
4	Select the **FILTER** button.  You see the results of your search.

	
5	To initiate a proposal, select **Apply Now** for the proposal. • Selecting **Not Interested** below an opportunity will hide the opportunity from the **My Opportunities** section. • Selecting **Reset My Opportunities** will allow any previously hidden opportunities to reappear in the **My Opportunities** section.
6	An agreement page will appear once an application has been initiated. Select **I AGREE** to apply for the application.

	
7	When you initiate a new application it is added to your **My Tasks** section on the **My Home** page. You can select **OPEN MY TASKS** to begin work on the document.  **Note:** See Complete Forms for information on completing the forms and changing the status of an application.

Work on an In-Process Application

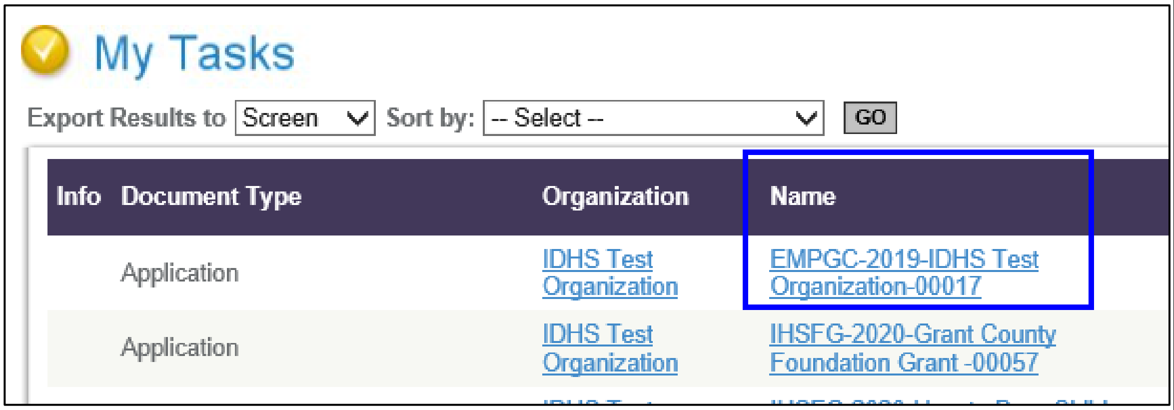
If you log out of IntelliGrants, you can return later to continue to work on an application.

To do so, follow these steps:

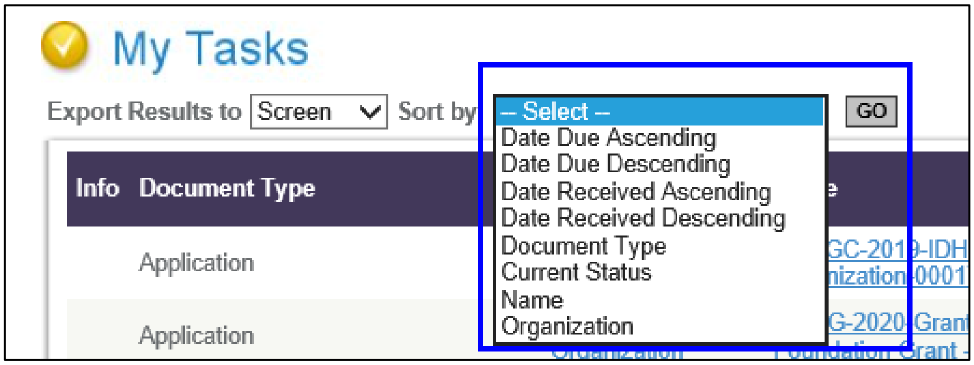
Step	Description
1	Select **My Home**.
2	Select the **OPEN MY TASKS** button to display a list of active applications.

3

Select the link for the application.



Tip: To help you quickly navigate to an application, you can sort the list. Display the **Sort by** drop-down list and selecting a sort order.

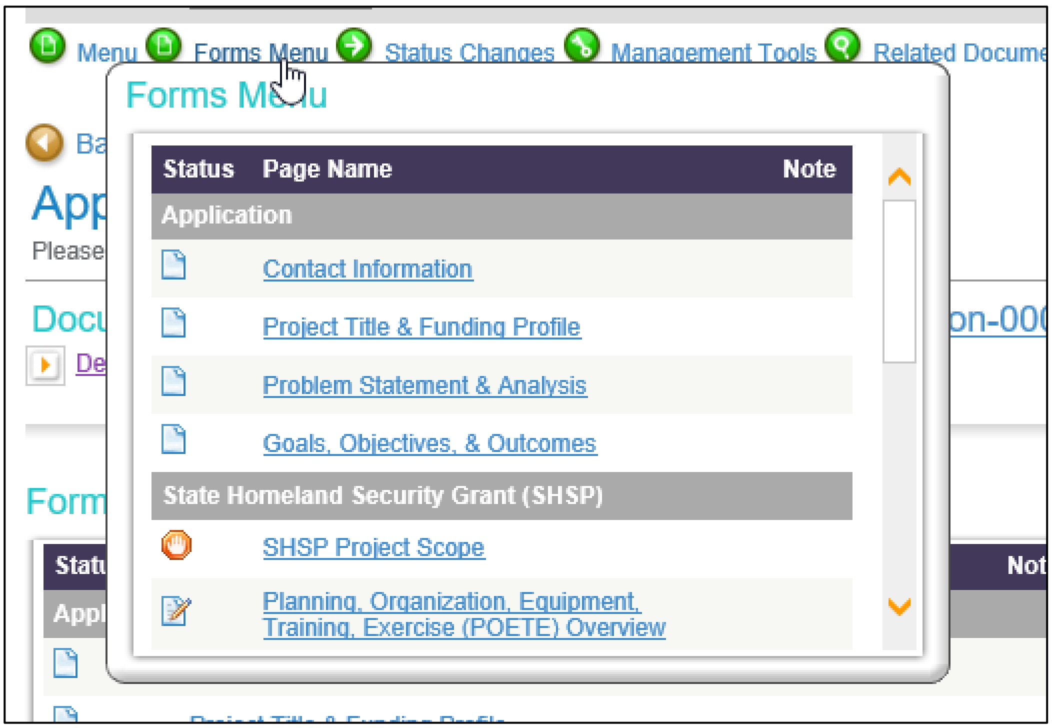


COMPLETE FORMS

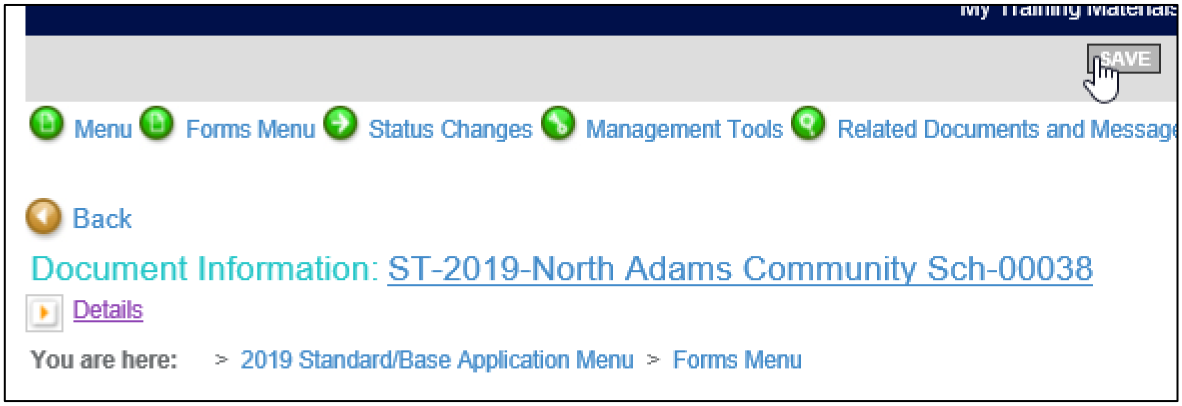
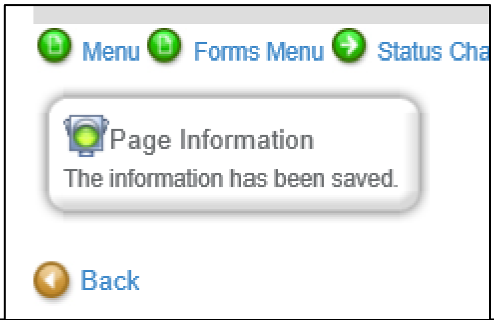
Most applications or reports require you to complete several forms as part of the process. These forms are listed on the **Forms Menu**. When you are viewing an application or form, you can view and complete the required fields from the **Forms Menu**. A document is the report or application that is specific to a user's organization. A form is the page within the document. A series of forms make up the document, found in the **Forms Menu**.

Open a Form and Enter Data

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Hover over the Forms Menu button to view a list of forms.



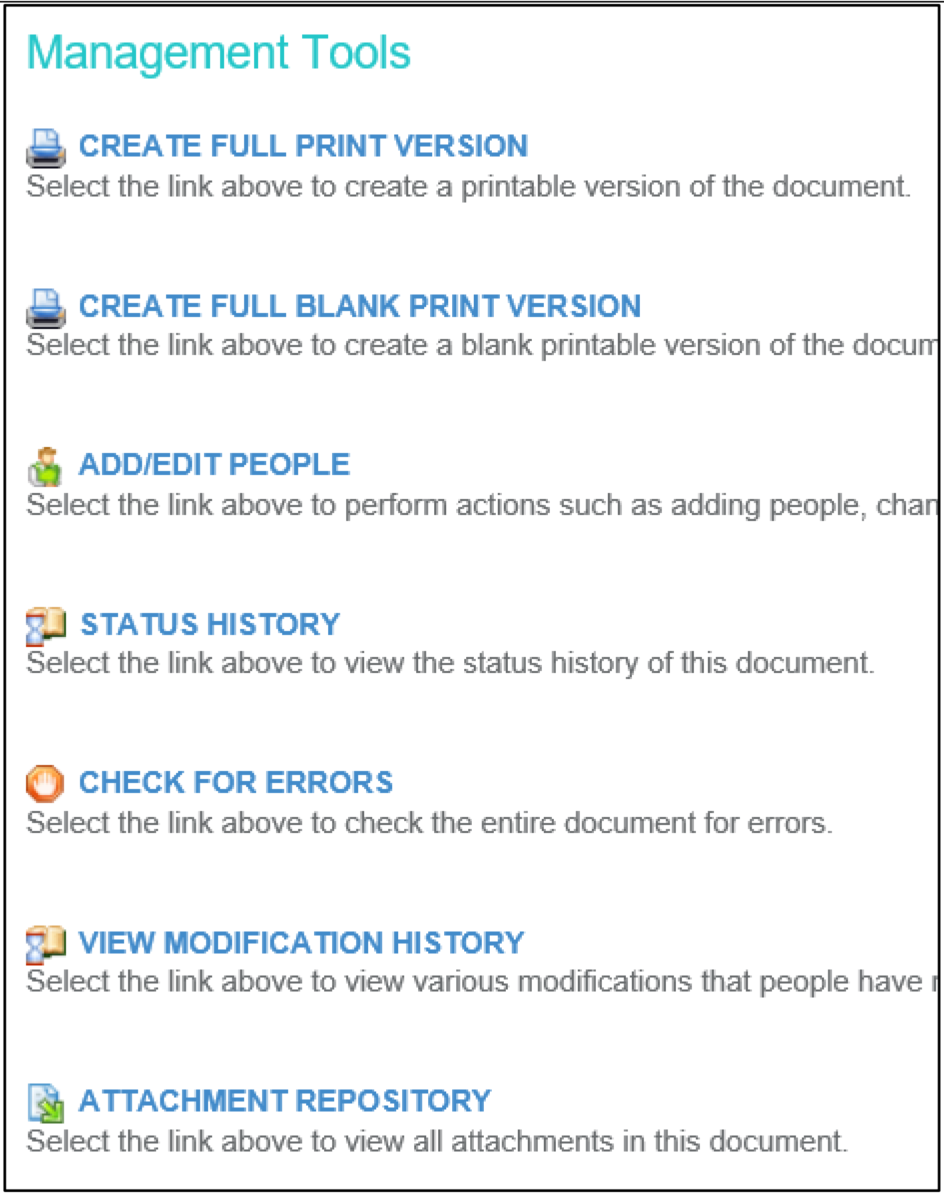
</td></tr>
<tr><td>2</td><td>Select the link for the page to complete.</td></tr>
<tr><td>3</td><td>Enter the data, using Tab to move from field to field.</td></tr>
</table>

4	Select **SAVE** in the top right to save the form. A **Page Information** message will appear when the page has been successfully saved.  

Management Tools

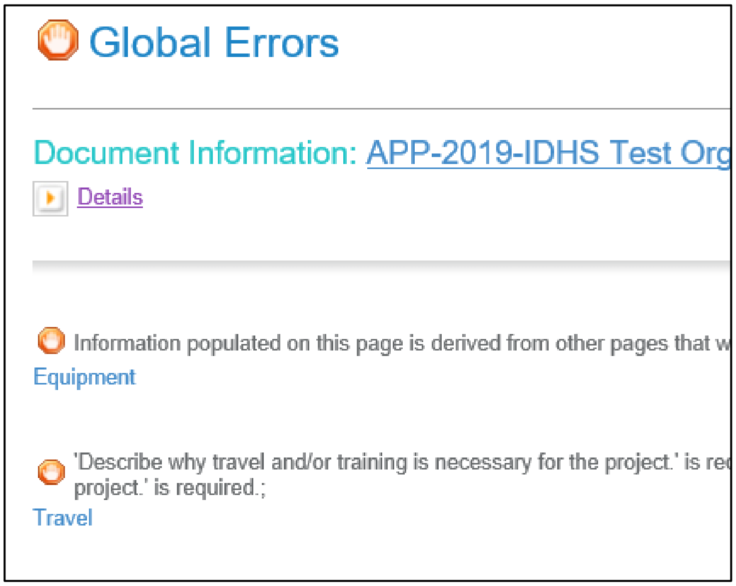
The **Management Tools** section allows a SubGrantee Administrator and/or SubGrantee Project Director certain administrative responsibilities such as the ability to add/edit people to a proposal (attach users to an application) and view an application's status history.

Step	Description
1	Select the **Management Tools** 
2	This will return a list of Management tools



<u>Brief Overview of Management Tools:</u>

- **CREATE FULL PRINT VERSION** creates a printable version of the document for reading and/or saving
- **CREATE FULL BLANK PRINT VERSION** creates a blank form/template version
- **ADD/EDIT PEOPLE** is used to add people, change security, alter active dates, etc.
- **STATUS HISTORY** provides the statuses that a document has passed through.
- **CHECK FOR ERRORS** checks the document for errors and returns a **Global Errors** list of links to pages with identified errors that must be corrected before the document can be moved to the next status.

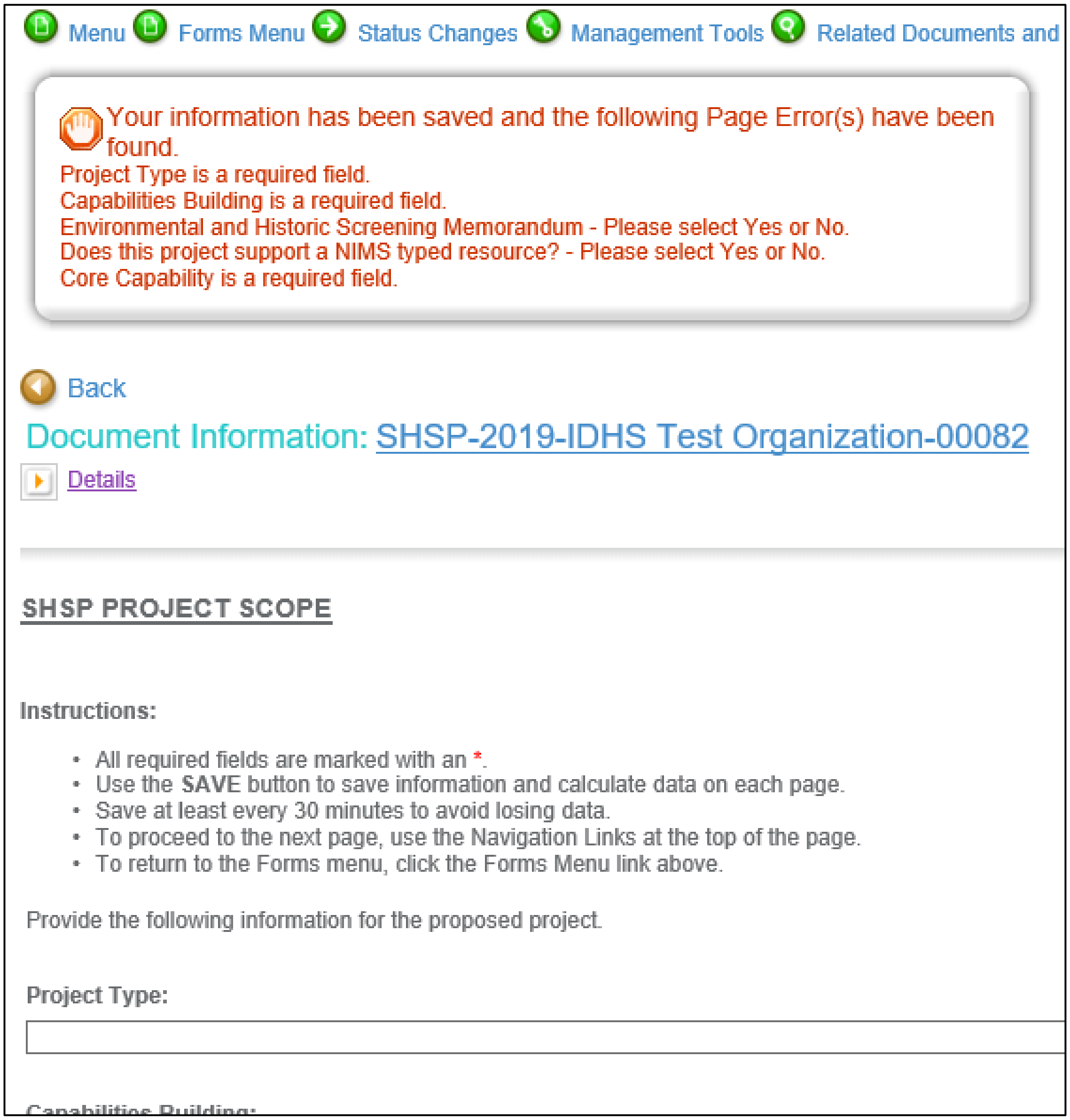


When the icon on the far left of the menu is a stop sign , that indicates the page has an error on it. The message within the Page Error will give direction for correcting the error. To see a list of Global Errors hover over Management Tools and select Check for Errors.

- **VIEW MODIFICATION HISTORY** is used to view modifications people have made to specific pages in the document. SubGrantee users can select from a list of modified application pages to be taken to that specific page. They can then select the icon next to an individual field to view the previous value for that field.
- **ATTACHMENT REPOSITORY** is used to view all attachments within the document. The SubGrantee Administrator can view all attachments within an application or grant. To do so, click Management Tools and then click **ATTACHMENT REPOSITORY**. The document's attachments will be listed with the Form Name that the Attachment will be found on. To update the attachment, go to the attachment's form to make the changes that need to be made.

When entering data, keep these guidelines in mind:

- When the icon is a pencil , that indicates the page has been saved at least once and is being edited or is complete.
- When the icon is a green checkmark , that indicates the page is marked as complete.
- Be careful when copying and pasting information from another program (for example, Microsoft Word) to an IntelliGrants form. IntelliGrants does not recognize some characters and formatting, such as tables, graphs, photographs, bullets, and some tabs. Try copying and pasting the text into Notepad first and then into IntelliGrants to avoid problems.
- If you copy and paste text that is too long for the set character limits for that field, you see an error message. Edit the text so that it is within the required character limits.
- When possible, IntelliGrants automatically calculates totals and other numbers. When information is entered on the page, the system takes the values that were entered, calculates, and displays them.
- When a form is saved but the required fields are not completed or you have broken any data validation rules for any of the fields, you see an error message at the top of the page. You can correct the error do so later. Note that before you submit the application, you must correct all errors.


Menu Forms Menu Status Changes Management Tools Related Documents and

Your information has been saved and the following Page Error(s) have been found.
Project Type is a required field.
Capabilities Building is a required field.
Environmental and Historic Screening Memorandum - Please select Yes or No.
Does this project support a NIMS typed resource? - Please select Yes or No.
Core Capability is a required field.

Back

Document Information: SHSP-2019-IDHS Test Organization-00082

Details

SHSP PROJECT SCOPE

Instructions:

- All required fields are marked with an *.
- Use the **SAVE** button to save information and calculate data on each page.
- Save at least every 30 minutes to avoid losing data.
- To proceed to the next page, use the Navigation Links at the top of the page.
- To return to the Forms menu, click the Forms Menu link above.

Provide the following information for the proposed project.

Project Type:

Capabilities Building:

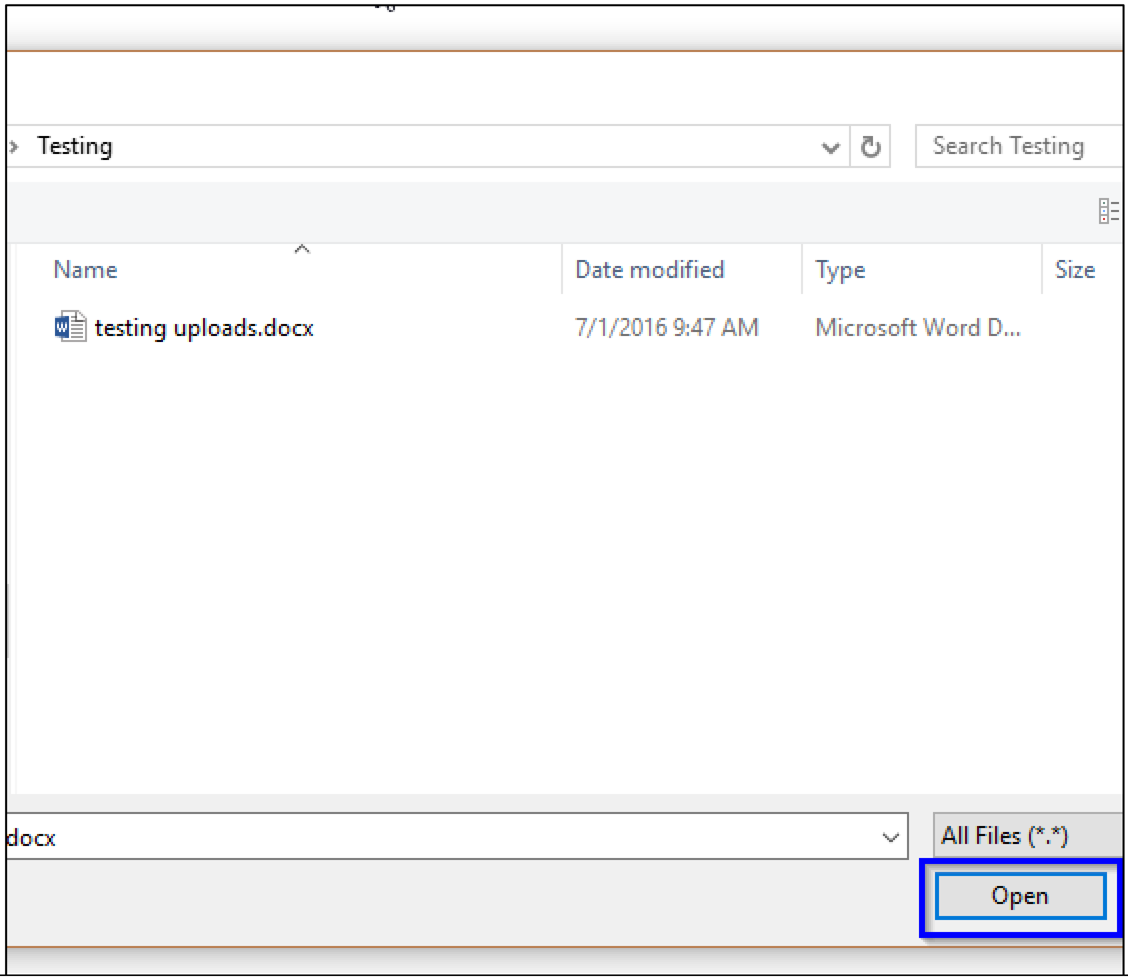
Upload Attachments

You can upload attachments, such as an Excel spreadsheet for a budget. You can upload these file types: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls, xlsx.

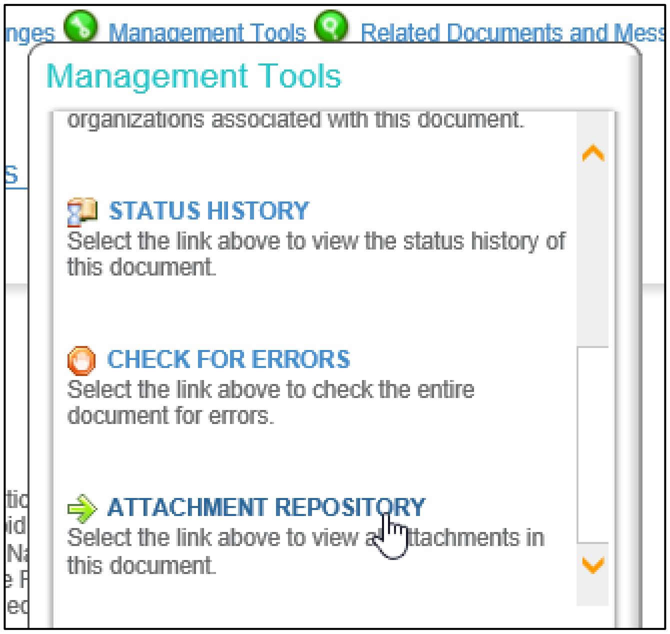
Cautions:

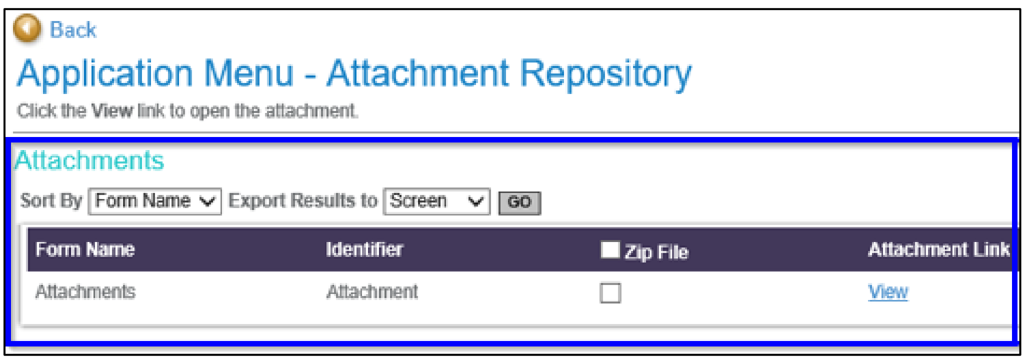
- ✓ Make sure that any uploaded attachments does not contain confidential/sensitive data that is not required to support the grants-management process—for example, Social Security Numbers (generally just the last four digits are displayed), bank routing or account numbers, credit card data, etc. If the information is confidential/sensitive, redact that information first.
- ✓ The uploaded file name cannot contain any special characters. If needed, rename the file before uploading.

Follow these steps to upload an attachment:

Step	Description
1	If an attachment is required or optional on a page, the **file upload** will appear on the page. To upload a file, click the **Browse** button. 
2	Navigate to the folder that contains the file, select the file to upload, and click the **Open** button. 
3	Once the document is uploaded to the page, click **SAVE**.

Tip: You can view attachments within a document using the **Attachment Repository** tool.



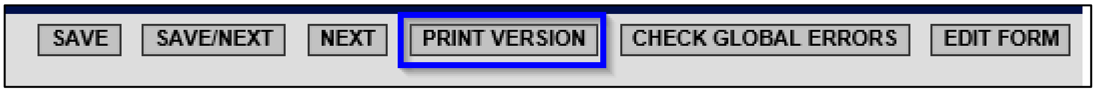
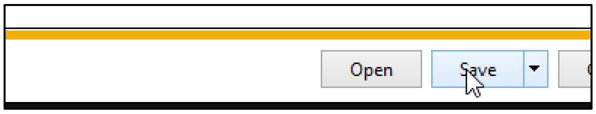


Print a PDF

You can create a PDF of an application to print or save before submitting.

> **Note:** You can view and print PDFs from Adobe Acrobat Reader. If you do not have this program, contact your System Administrator.

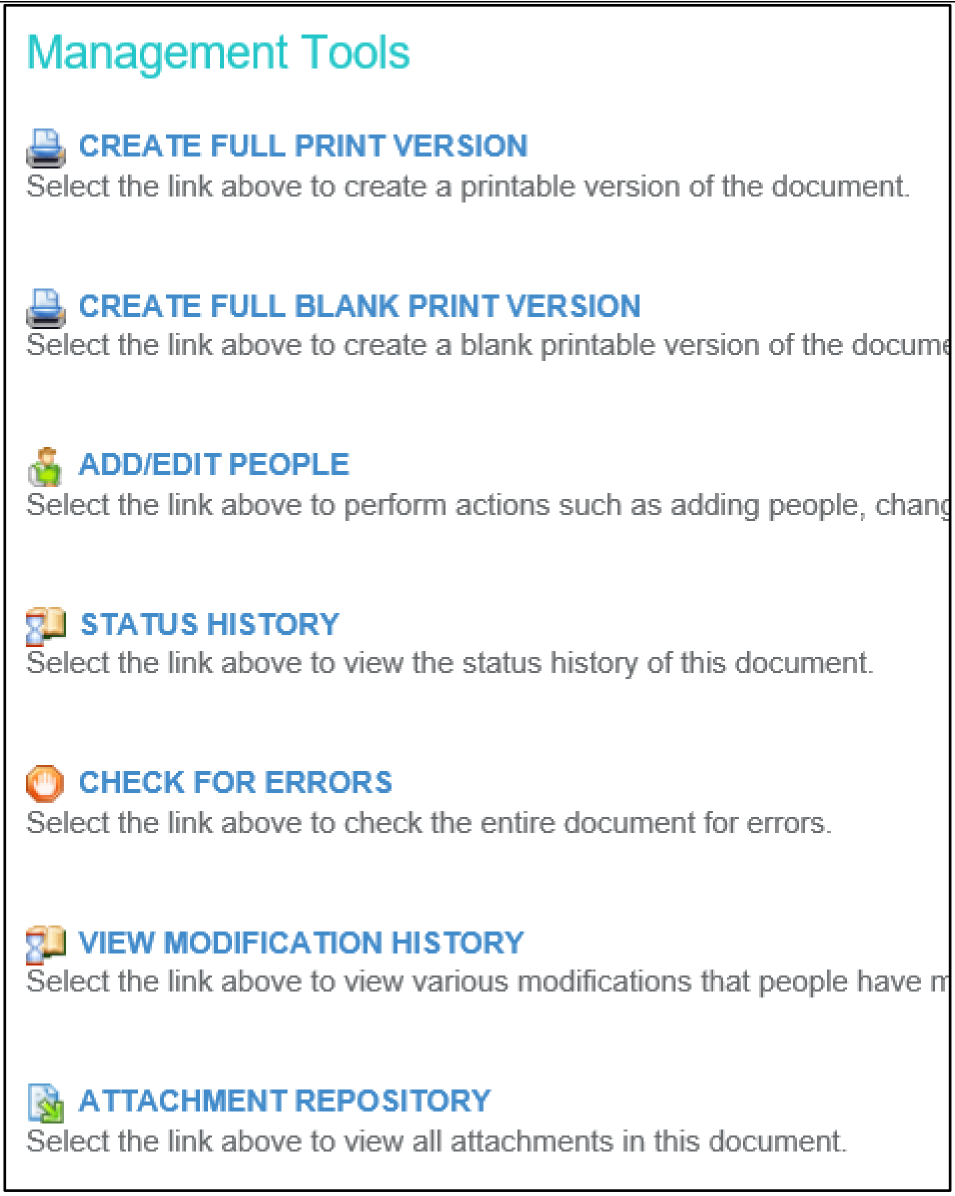
To print an application, follow these steps:

Step	Description
1	With the application open that you want to create a PDF, click the **PRINT VERSION** button. 
2	The option to Open or Save the PDF will appear at the bottom of the page. 
3	The Open option will open the PDF with Adobe Acrobat Reader.
4	The Save option will save the PDF in the computer Download folder. Choose the down arrow to the right of the Save button to select “Save As” and choose the location of the file and to rename the PDF.

Create a Printable Version or Full Blank Application for Printing

A SubGrantee Administrator can use the Management Tools to print by following these steps:

Step	Description
1	Select **Management Tools**. You see a list of the different Management Tools you can use for documents (and users).

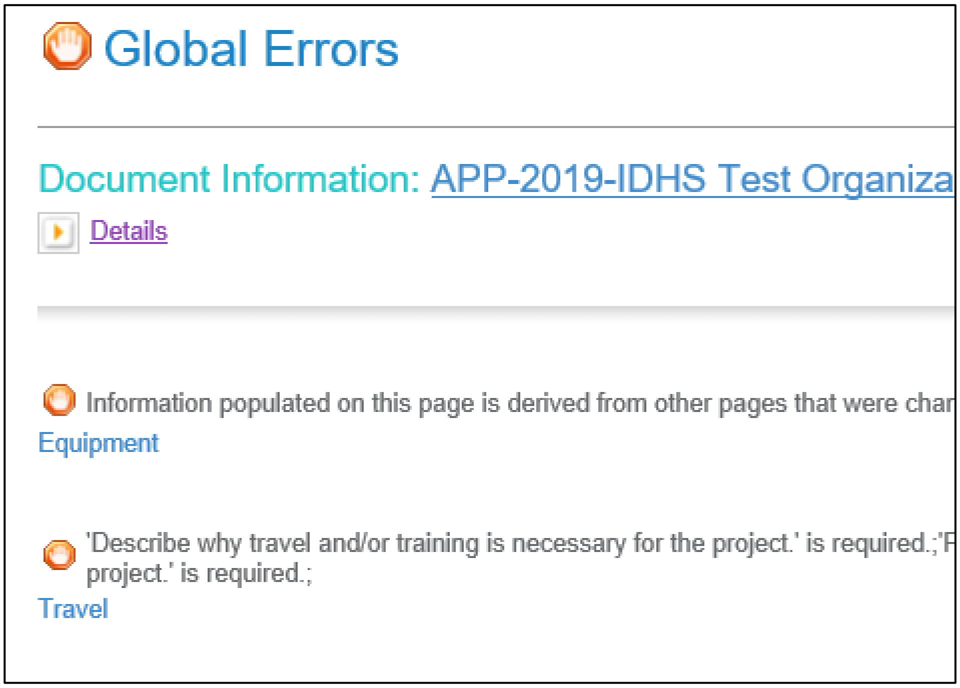


2	Select **CREATE FULL PRINT VERSION** to create a printable version of the application. You might do this to review the printed version and verify. Or you may want a paper copy to save. **OR** Select **CREATE FULL BLANK PRINT VERSION** to print a blank version of the full application. You might use the blank application as an example to include so that another user knows what information is needed to complete the application.
3	Select either print option. Open or save the PDF to print with Adobe Acrobat Reader.

Check an Application for Errors

Before submitting an application, a SubGrantee Administrator can check for errors. Doing so creates a Global Errors list with links to pages that have identified errors that must be corrected before the document can be moved to the next status.

To check for errors, follow these steps:

Step	Description
1	Select **Management Tools**.
2	Select **CHECK FOR ERRORS**. You see the results of the error check. 
3	Use the links to review the flagged errors and then make any changes.

View Related Documents and Messages

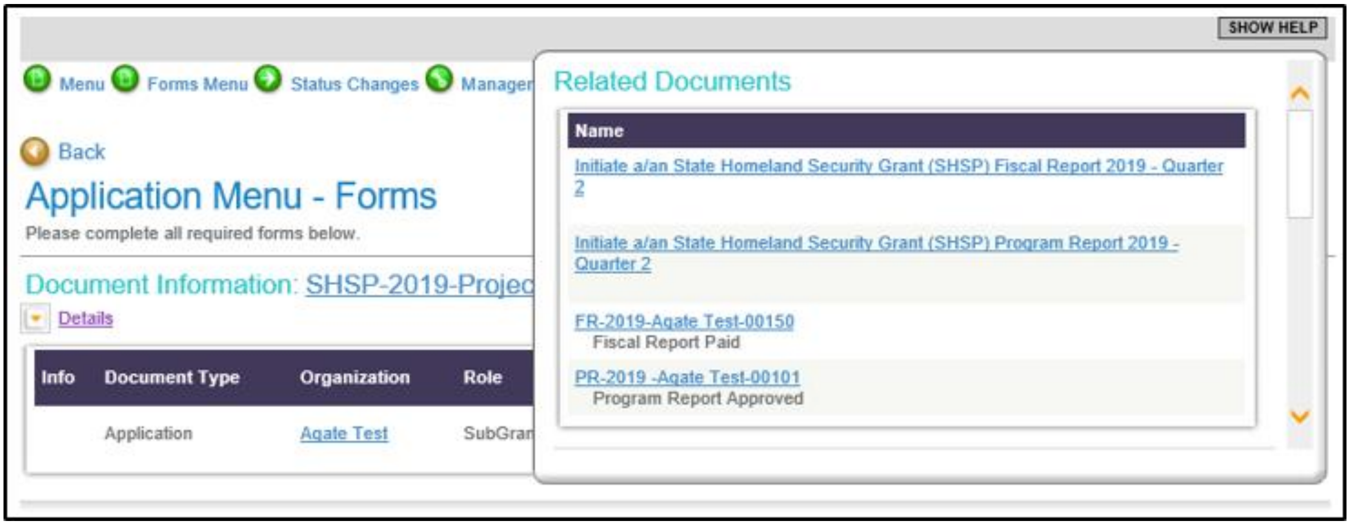
The SubGrantee Administrator can use the information in the **Related Documents and Messages** to view documents such as **Program Reports, Fiscal Reports**, and any related messages. The SubGrantee Administrator can also initiate subdocuments such as **Program Reports** and **Fiscal Reports** if needed.

COMPLETE SUB DOCUMENTS

Documents such as **Program Reports** and **Fiscal Reports** are completed by SubGrantee users each quarter. These documents are initiated from your application/grant document menu and can be accessed at any time by returning to your main document.

To initiate a sub document, navigate to your document menu and hover over the **Related Documents and Messages** link. If a sub document is available to initiate, a link will appear to initiate the sub document. For example, if it is a **Fiscal Report** for the 2019 SHSP grant, the link will say "Initiate a State Homeland Security Grant (SHSP) Fiscal Report 2019 - Quarter 1." Additional links will appear for subsequent quarters as they are made available to the SubGrantee. The sub documents are usually only available to initiate if the grant is approved and there are no pending sub documents of the same type in process.

Underneath the links used to initiate new sub documents, users can find links to any existing sub documents along with the current status.



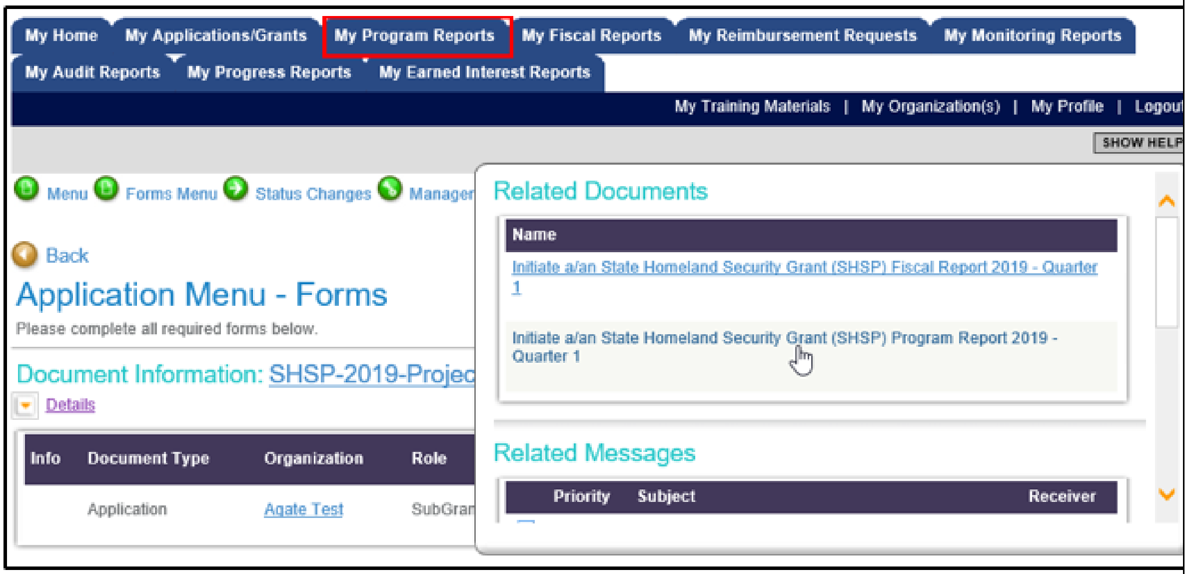
Program Reports

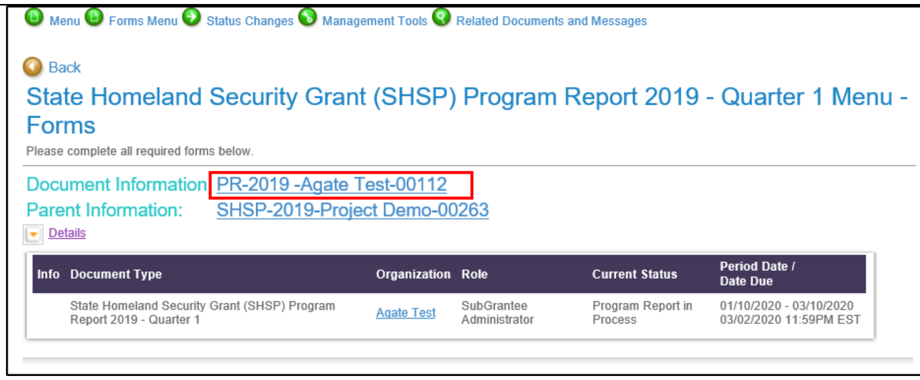
Program Reports will be the first sub document to be completed during the grant cycle. In order to initiate a Program Report, the application/grant document must be in the status: **Agreement Executed**.

***Note: SubGrantee Administrator** and **SubGrantee Project Directors** will receive a notification via email and system message when the document has reached the status: **Agreement Executed**. This notification will be the indicator that your document is permitted to begin a Program Report.

The **SubGrantee Administrator**, **SubGrantee Project Director**, and **SubGrantee Fiscal Agent** roles are the only roles authorized to initiate a Program Report.

To complete a Program Report, follow these steps:

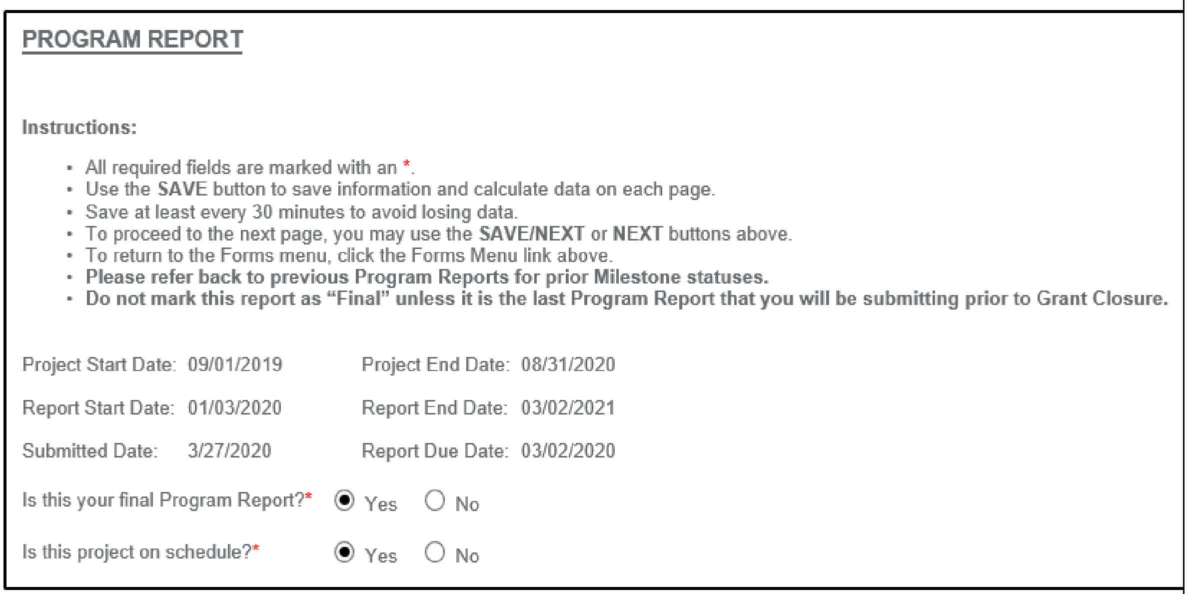
Step	Description
1	Navigate to your application/grant document.
2	Hover over the **Related Documents and Messages** link and select the link for the Program Report for the current quarter. Existing Program Reports can be accessed in this menu, or by using the **My Program Reports** search tab found at the top of the screen. 
3	Note the new document identifier created for your Program Report.



4

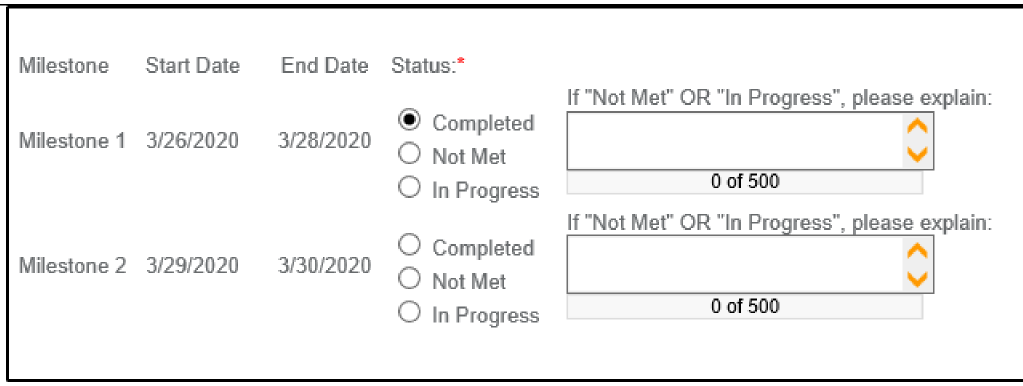
Complete each form in the Program Report. When finished with a form, use the **SAVE** or **SAVE/NEXT** buttons at the top of the form to record your progress.

Note the first question on the Program Report form – “Is this your final Program Report?” If you select “Yes” for this question, the Fiscal Report for this quarter will also be required to be marked Final. Be sure to select “Yes” if completing a last Program Report.



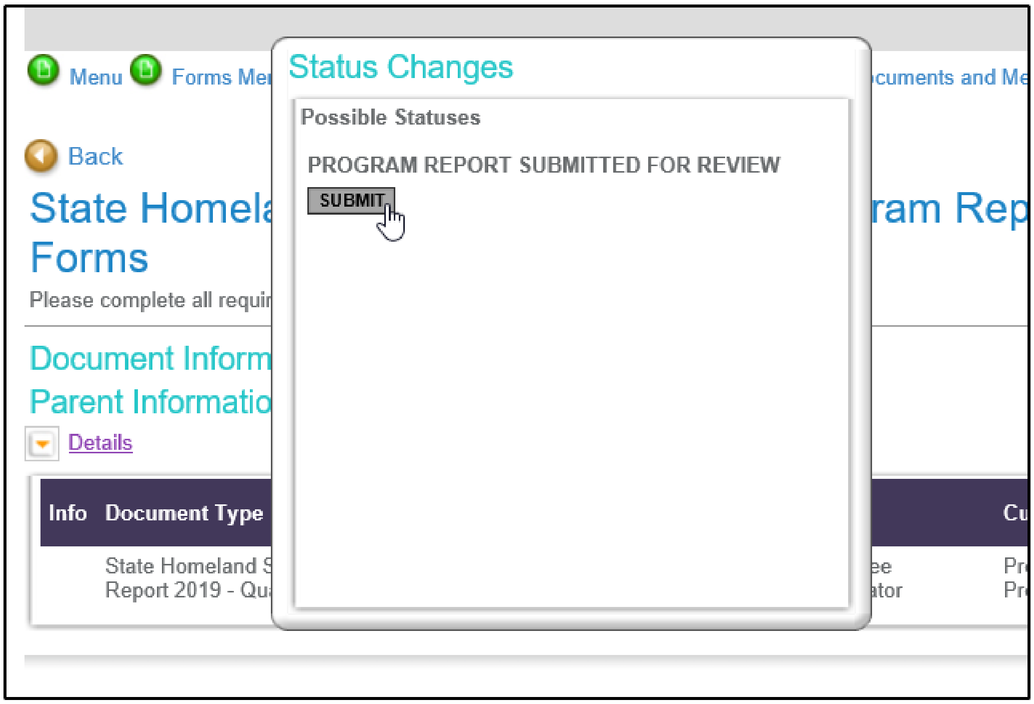
Also note the Milestone Status selections on this form. Any milestones marked “Completed” will automatically be marked “Completed” on subsequent Program Reports. Milestones marked “Not Met” or “In Progress” will not have their status carried over.

<table>
<tr><td></td><td>



</td></tr>
<tr><td>5</td><td>

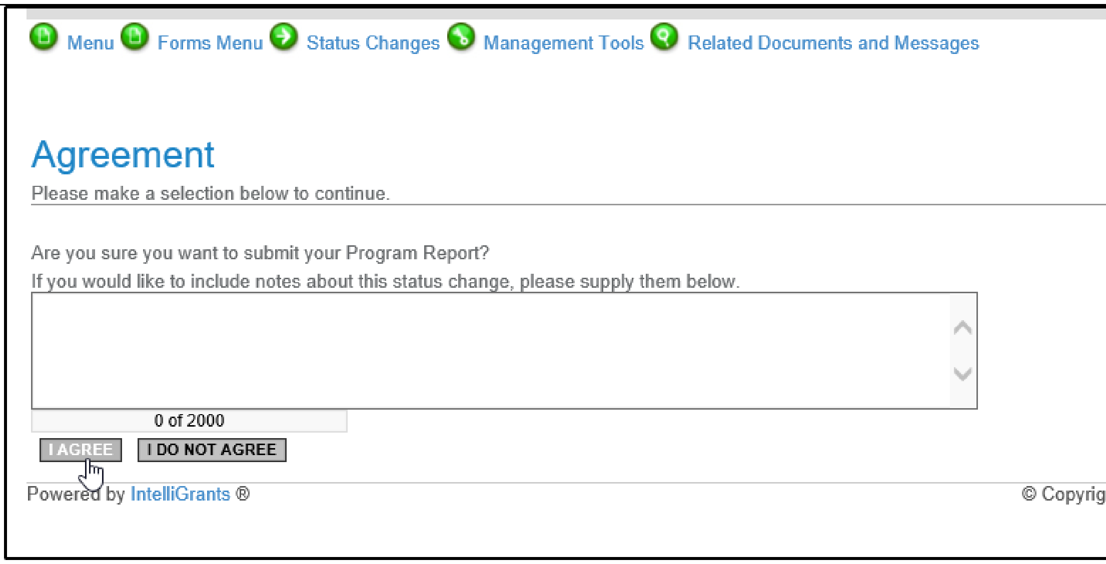
When all forms have been completed and no errors remain on the document, submit your Program Report by hovering over the **Status Changes** menu and selecting **Submit** under **Program Report Submitted for Review**.



On the next screen, enter any notes you would like to submit along with your document, and select **I Agree** to complete your submission.

***Note:** Any notes provided on the status change will appear in the document's status history. The status history can be accessed using the **Management Tools** on the document. Please see page 33 for reference for Management Tool use.

</td></tr>
</table>



Fiscal Reports

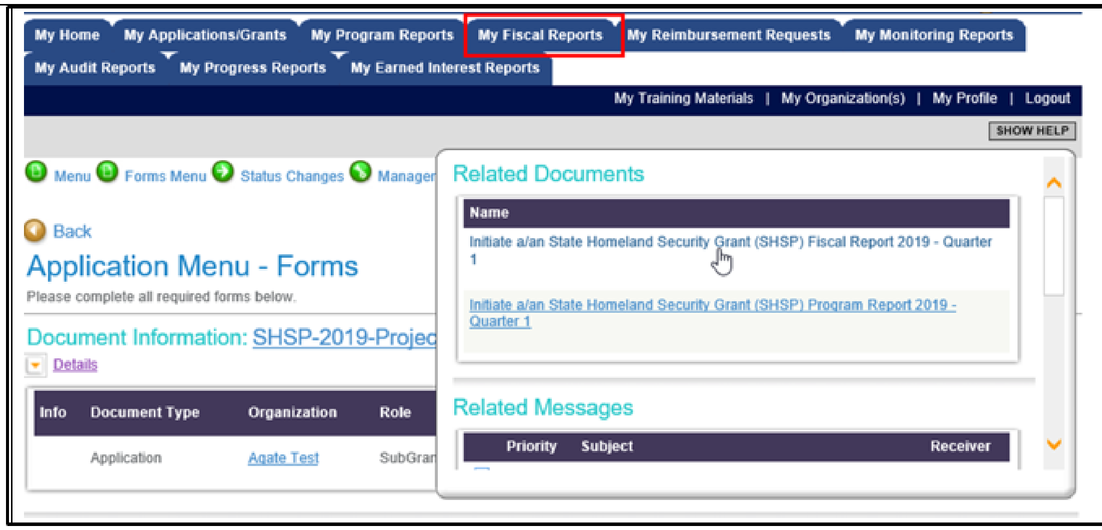
Fiscal Reports will be the second sub document to be completed during the grant cycle. In order to initiate a Fiscal Report, the application/grant document must be in the status: **Agreement Executed**, and the Program Report for the current quarter must be in the status: **Program Report Approved**.

***Note: SubGrantee Administrator** and **SubGrantee Project Directors** will receive a notification via email and system message when the Program Report document has reached the status: **Program Report Approved**. This notification will be the indicator that your document is permitted to begin a Fiscal Report.

The **SubGrantee Administrator**, **SubGrantee Project Director**, and **SubGrantee Fiscal Agent** roles are the only roles authorized to initiate a Fiscal Report.

To complete a Fiscal Report, follow these steps:

Step	Description
1	Navigate to your application/grant document.
2	Hover over the **Related Documents and Messages** link and select the link for the Fiscal Report for the current quarter. Existing Fiscal Reports can be accessed in this menu, or by using the **My Fiscal Reports** search tab found at the top of the screen.



3 Note the new document identifier created for your Fiscal Report.

4 Your Fiscal Report will create a unique budget page for each budget page you completed and submitted with your application.

Forms

Status	Page Name	Note	Created By	Last Modified By
State Homeland Security Grant Program (SHSP) Fiscal Report				
	Fiscal Report and Reimbursement Claim Form		Test Indy 3/27/2020 10:31:59 AM	
	Supplies		Test Indy 3/27/2020 10:31:59 AM	
	Equipment		Test Indy 3/27/2020 10:31:59 AM	
	Travel		Test Indy 3/27/2020 10:31:59 AM	

5

Complete each individual budget page.

On each page, enter the amount of Grant Funds you are requesting reimbursement for in the **Grant Funds Expended this Period** column. There will be a line for every individual budget item, taken from the budget forms on your application. Make sure to enter the appropriate amount on each line, then fill out the remaining required fields and **SAVE** the page.

TRAVEL

Instructions:

- All required fields are marked with an *.
- Use the **SAVE** button to save information and calculate data on each page.
- Save at least every 30 minutes to avoid losing data.
- To proceed to the next page, use the Navigation Links at the top of the page.
- To return to the Forms menu, click the Forms Menu link above.
- Please reference the solicitation for additional instructions.
- To add additional rows, click the **SAVE** button.

***Please Note: Approved travel expenditures will be prepopulated, you will need to complete one page for each trip if requesting reimbursement for the quarter. If no reimbursement is requested for this quarter, you will need to enter '0'.**

Purpose of Travel: Organization

Is this for a conference? No

Format: Emergency Management Alliance of Indiana (EMAI)
Name of Conference:

Start Date of Trip: 3/30/2020 **End Date of Trip:** 3/31/2020

Location of Travel: Chicago

Total Number of Travelers: 1

If name of traveler has changed please enter in the textbox below:
Name of Traveler: John Smith

Travel Expense	Fund Type	POETE	Discipline	Quantity	Cost Per Day, Item, or Mile	Total Costs	Percentage	Grant Costs	Grant Funds Expended to Date	Grant Funds Expended This Period	Remaining Balance
Lodging If Other - please specify	Grant	Organization	Cyber Security	1	$1,000.00	$1,000.00	100.00%	$1,000.00	$0	$500.00	$500.00
					Travel (Including Training) - Total: $1,000.00				$0	$500.00	$500.00

Please describe how the grant funds included in the expenditure(s) for the fiscal report were utilized to support your project.

***Note**: HMEP Fiscal Reports contain Planning, Training, and Exercise budget forms that serve as "overview" forms for the rest of the budget. The individual Planning, Training, or Exercise amounts entered on these forms must match the associated amounts entered on subsequent budget forms such as Supplies or Equipment.

6

Once each budget page has been completed and no errors are present, return to the **Fiscal Report and Reimbursement Claim Form** and **SAVE.** This will update the data in the following columns:

- The **Grant Costs** column will display the total grant amount for each category, taken from your application.
- The **Grant Funds Requested to Date** column will display the grant funds requested in previous quarters' Fiscal Reports.
- The **Grant Funds Requested this Period** column totals the amounts requested for reimbursement for each budget category in the current Fiscal Report.
- **Grant Funds Remaining Balance** will display the balance to be carried forward to your next Fiscal Report.
- If your grant type includes match funds reporting, match funds totals will be displayed here as well. Match is only for recording purposes and will not be reimbursed.

FISCAL REPORT AND REIMBURSEMENT CLAIM FORM

Instructions:

- All required fields are marked with an *.
- Use the **SAVE** button to save information and calculate data on each page.
- Save at least every 30 minutes to avoid losing data.
- To proceed to the next page, use the Navigation Links at the top of the page.
- To return to the Forms menu, click the Forms Menu link above.

Project Start Date: 09/01/19 Report Start Date: 01/03/20

Project End Date: 08/31/20 Report End Date: 03/02/21

Submitted Date: Report Due Date: 03/02/20

Will this be your final Fiscal Report and Reimbursement Claim Form? * ○ Yes ◉ No

Select the hyperlink to download a PDF of the complete breakdown for each PTE budget category and scope

Budget Categories	Fund Type	Grant Costs	Grant Funds Requested to Date	Grant Funds Requested this Period	Grant Funds Remaining Balance
SHSP Budget Categories					
Planning Costs	Grant	$0	$0	$0	$0
Organization Costs	Grant	$2,000.00	$0	$1,000.00	$1,000.00
Equipment Costs	Grant	$2,000.00	$0	$1,000.00	$1,000.00
Training Costs	Grant	$3,000.00	$0	$1,500.00	$1,500.00
Exercise Costs	Grant	$0	$0	$0	$0
SHSP Grand Total Costs	Grant	**$7,000.00**	**$0**	**$3,500.00**	**$3,500.00**

7

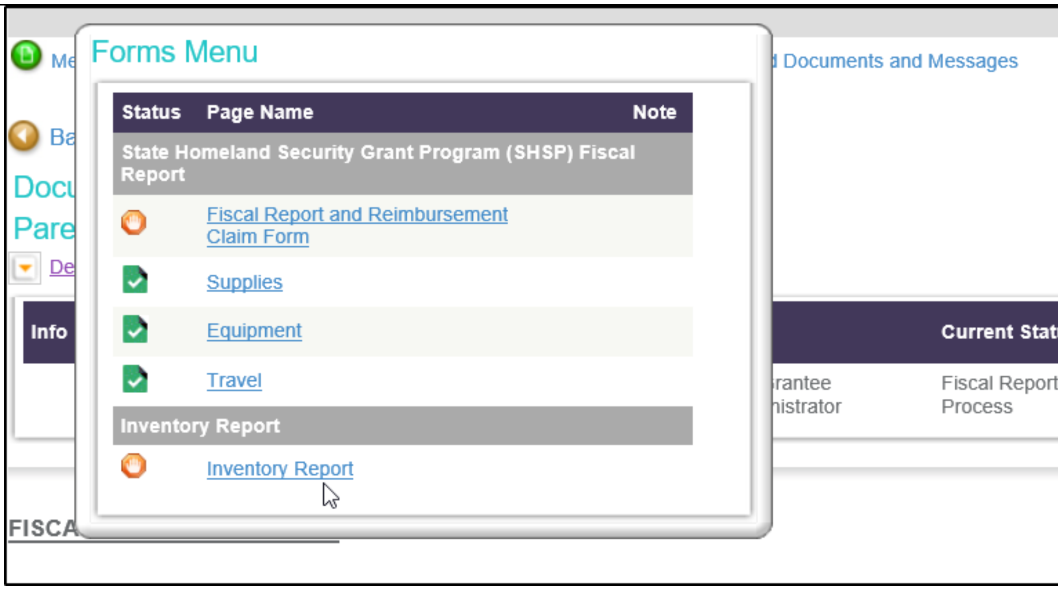
If this is the last Fiscal Report you will be submitting for your grant, select "Yes" next to "Will this be your Final Fiscal Report and Reimbursement Claim Form". You will be asked to verify that you want to deobligate any unused grant funds. Do so by selecting the "Yes" checkbox.

***Note**: If the current quarter's Program Report was marked final, this Fiscal Report must be marked final as well.

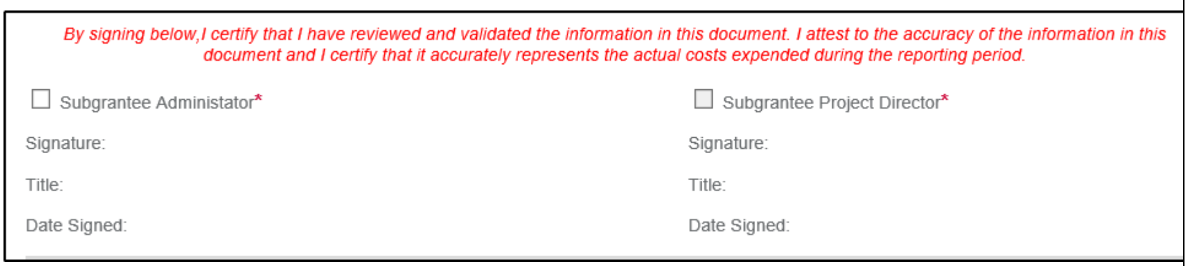
<table>
<tr>
<td></td>
<td>
<u>FISCAL REPORT AND REIMBURSEMENT CLAIM FORM</u>
Instructions:

All required fields are marked with an *.
Use the SAVE button to save information and calculate data on each page.
Save at least every 30 minutes to avoid losing data.
To proceed to the next page, use the Navigation Links at the top of the page.
To return to the Forms menu, click the Forms Menu link above.

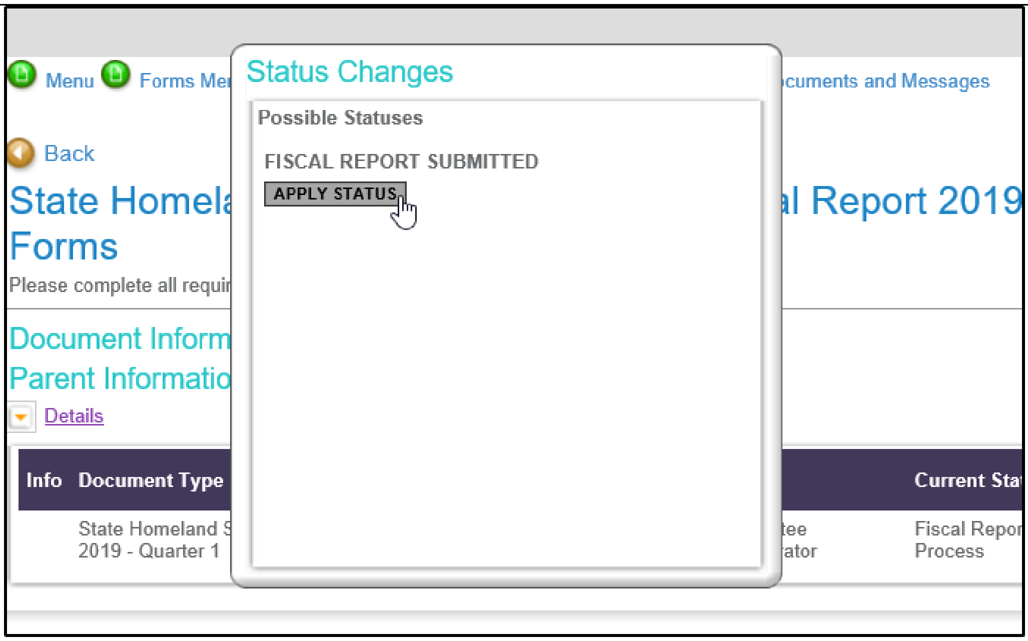
Project Start Date: 09/01/19 Report Start Date: 01/03/20
Project End Date: 08/31/20 Report End Date: 03/02/21
Submitted Date: Report Due Date: 03/02/20
Will this be your final Fiscal Report and Reimbursement Claim Form? * ◉ Yes ○ No
Are you sure you want to deobligate your remaining grant funds balance of $3,500.00? * ☑ Yes
*Note: If you have a remaining balance on your final Fiscal Report you must select checkbox to deobligate the remaining balance, as seen in the screenshot above. If deobligating funds, after your Final Fiscal Report has reached the status: Final Fiscal Report Paid, you must file a Grant Adjustment Notice (GAN) Request.
</td>
</tr>
<tr>
<td>8</td>
<td>
The Fiscal Report and Reimbursement Claim Form must be signed by both the Subgrantee Administrator and Subgrantee Project Director for your organization. When the appropriate user is logged in, select the checkbox next to the Signature field and SAVE the page. Your name and the date will be populated automatically.
Subgrantee Administrator Subgrantee Project Director
☑ * Signature: <u>Test Indy</u> ☐ * Signature:
Date Signed: <u>3/27/2020</u> Date Signed:
</td>
</tr>
<tr>
<td>9</td>
<td>
If you are requesting reimbursement for Equipment items in this Fiscal Report, an Inventory Report form will be generated. This form can be found at the bottom of the Forms Menu after items are claimed on the Equipment form.
</td>
</tr>
</table>

<table>
<tr><td></td><td>


Complete the Inventory Report form and have both the SubGrantee Administrator and the SubGrantee Project Director complete the required electronic signatures on this page. These fields function in the same way as the signature fields required in step 8.

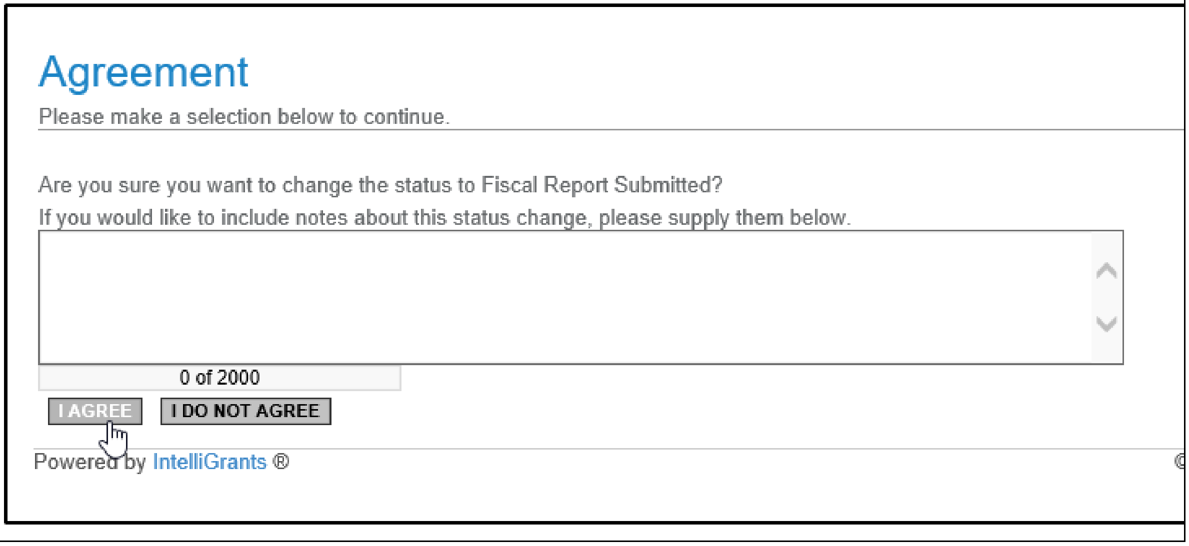


</td></tr>
<tr><td>10</td><td>When all forms have been completed and no errors remain on the document, submit your Fiscal Report by hovering over the Status Changes menu and selecting Apply Status under Fiscal Report Submitted.</td></tr>
</table>



On the next screen, enter any notes you would like to submit along with your document, and select **I Agree** to complete your submission.

***Note:** Any notes provided on the status change will appear in the document's status history. The status history can be accessed using the **Management Tools** on the document. Please see page 33 for reference for Management Tool use.

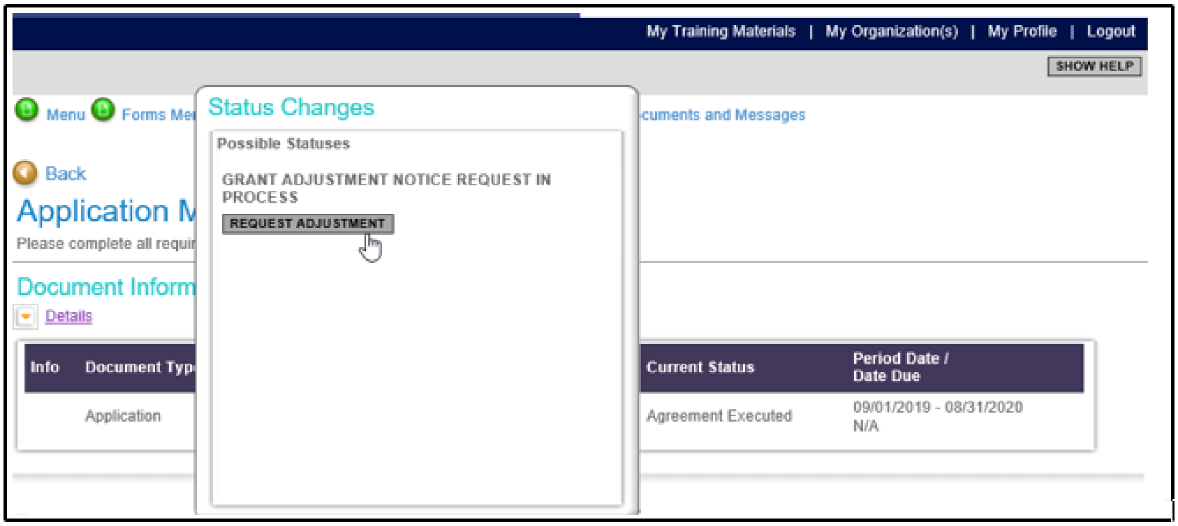


COMPLETE A GRANT ADJUSTMENT NOTICE REQUEST

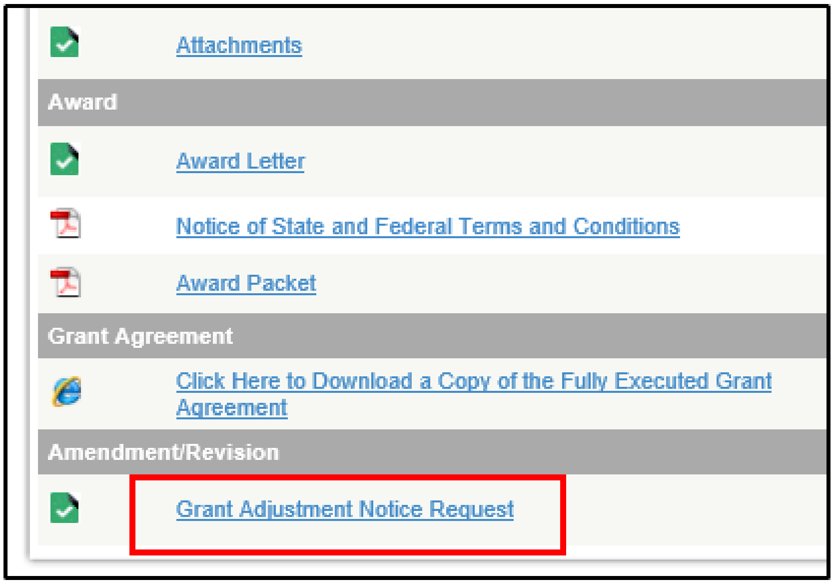
Grant Adjustment Notice Requests are used to make modifications to grant documents that have already been executed. In order to initiate a Grant Adjustment Notice Request, the application/grant document must be in the status: **Agreement Executed**, and the Quarter 1 Program Report and Fiscal Reports must be completed and approved. If any Program or Fiscal Reports have been started for subsequent quarters, these documents must also be completed and approved before initiating a Grant Adjustment Notice Request.

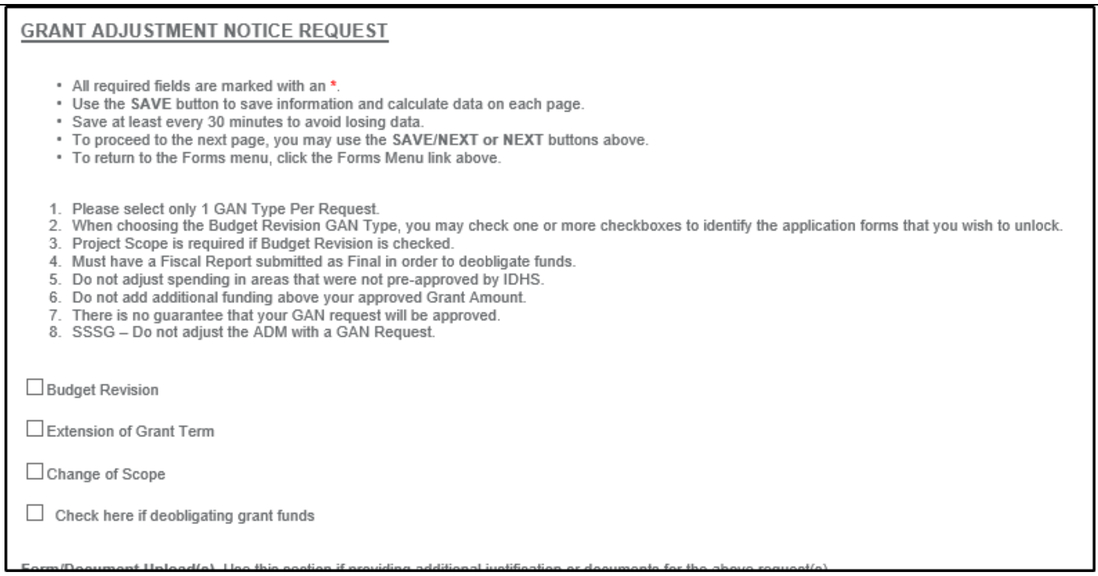
The **SubGrantee Administrator** and **SubGrantee Project Director** roles are the only roles authorized to initiate a Grant Adjustment Notice Request.

To complete a Grant Adjustment Notice Request, follow these steps.

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Navigate to your application/grant document.</td></tr>
<tr><td>2</td><td>Hover over the Status Changes menu link and select Request Adjustment to change the document status to Grant Adjustment Notice Request in Process.


On the next screen, enter any notes you would like to submit along with the status change, and select I Agree.</td></tr>
</table>

	***Note:** Any notes provided on the status change will appear in the document's status history. The status history can be accessed using the **Management Tools** on the document. Please see page 33 for reference for Management Tool use. 
3	Select the **Grant Adjustment Notice Request** form located at the bottom of the **Forms Menu**. 
4	On this form, select a **Grant Adjustment type**. Only one type should be selected per request.



GRANT ADJUSTMENT NOTICE REQUEST

- All required fields are marked with an *.
- Use the **SAVE** button to save information and calculate data on each page.
- Save at least every 30 minutes to avoid losing data.
- To proceed to the next page, you may use the **SAVE/NEXT** or **NEXT** buttons above.
- To return to the Forms menu, click the Forms Menu link above.

1. Please select only 1 GAN Type Per Request.
2. When choosing the Budget Revision GAN Type, you may check one or more checkboxes to identify the application forms that you wish to unlock.
3. Project Scope is required if Budget Revision is checked.
4. Must have a Fiscal Report submitted as Final in order to deobligate funds.
5. Do not adjust spending in areas that were not pre-approved by IDHS.
6. Do not add additional funding above your approved Grant Amount.
7. There is no guarantee that your GAN request will be approved.
8. SSSG – Do not adjust the ADM with a GAN Request.

☐ Budget Revision

☐ Extension of Grant Term

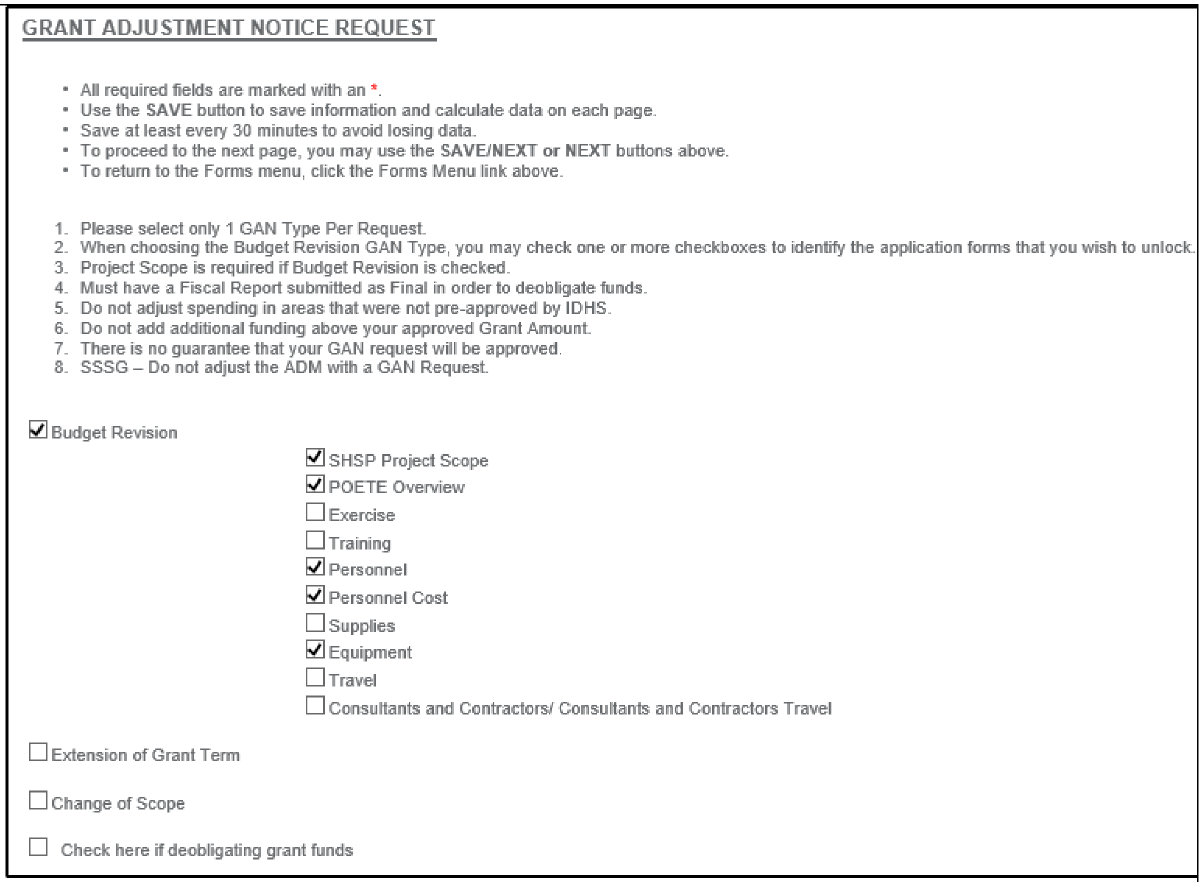
☐ Change of Scope

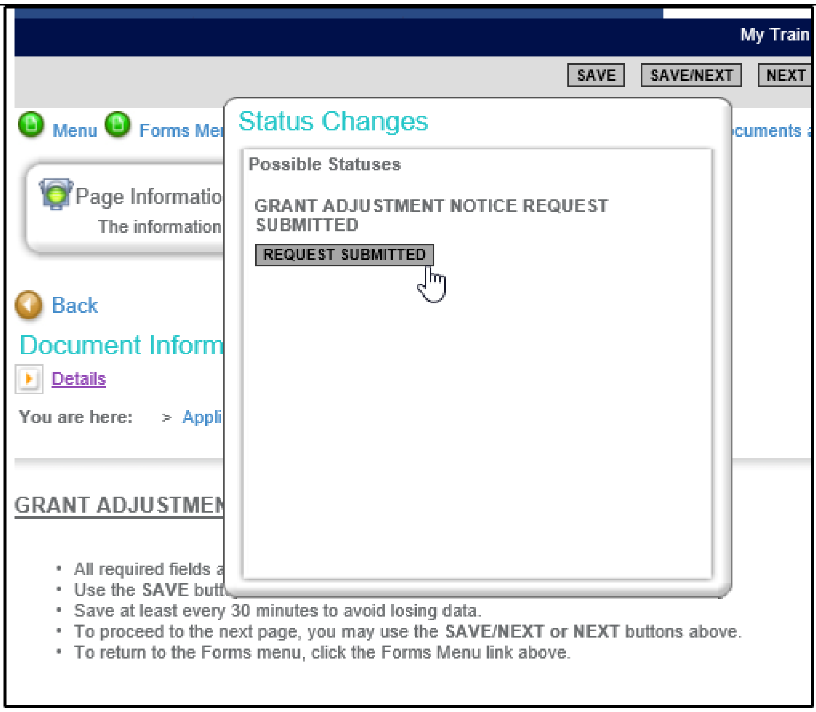
☐ Check here if deobligating grant funds

Additional fields will appear based on your selection. For example, if selecting a “Budget Revision” Grant Adjustment type, a list of all possible budget forms for your grant will appear. Select all budget pages that require modification. Similar required fields will appear when selecting “Extension of Grant Term”, “Change of Scope”, or “Check here if deobligating grant funds”.

***Note**: Most grant types contain an “Overview” budget page of some kind. These budget pages will most likely require modification if any other budget pages are modified. As the overview pages and budget pages must reconcile.

For example, budget modifications for SHSP grants will need to include the POETE Overview form and (in many cases) the SHSP Project Scope form. If the POETE Overview form is to be modified during a GAN, this must be modified first before modifying any other budget pages. Once this overview form is modified, then you may adjust the remaining budget forms.
Be sure to review your application forms before submitting a Grant Adjustment Notice Request to determine all forms that will need to be modified.

	 GRANT ADJUSTMENT NOTICE REQUEST • All required fields are marked with an *. • Use the SAVE button to save information and calculate data on each page. • Save at least every 30 minutes to avoid losing data. • To proceed to the next page, you may use the SAVE/NEXT or NEXT buttons above. • To return to the Forms menu, click the Forms Menu link above. 1. Please select only 1 GAN Type Per Request. 2. When choosing the Budget Revision GAN Type, you may check one or more checkboxes to identify the application forms that you wish to unlock. 3. Project Scope is required if Budget Revision is checked. 4. Must have a Fiscal Report submitted as Final in order to deobligate funds. 5. Do not adjust spending in areas that were not pre-approved by IDHS. 6. Do not add additional funding above your approved Grant Amount. 7. There is no guarantee that your GAN request will be approved. 8. SSSG – Do not adjust the ADM with a GAN Request. ☑ Budget Revision ☑ SHSP Project Scope ☑ POETE Overview ☐ Exercise ☐ Training ☑ Personnel ☑ Personnel Cost ☐ Supplies ☑ Equipment ☐ Travel ☐ Consultants and Contractors/ Consultants and Contractors Travel ☐ Extension of Grant Term ☐ Change of Scope ☐ Check here if deobligating grant funds
5	After making your selections, be sure to fill out all required fields on the page and select **SAVE**. Make the appropriate corrections based on any page errors that appear and **SAVE** again.
6	Hover over the **Status Changes** menu link and select **Request Submitted** to change the document status to **Grant Adjustment Notice Request Submitted**.

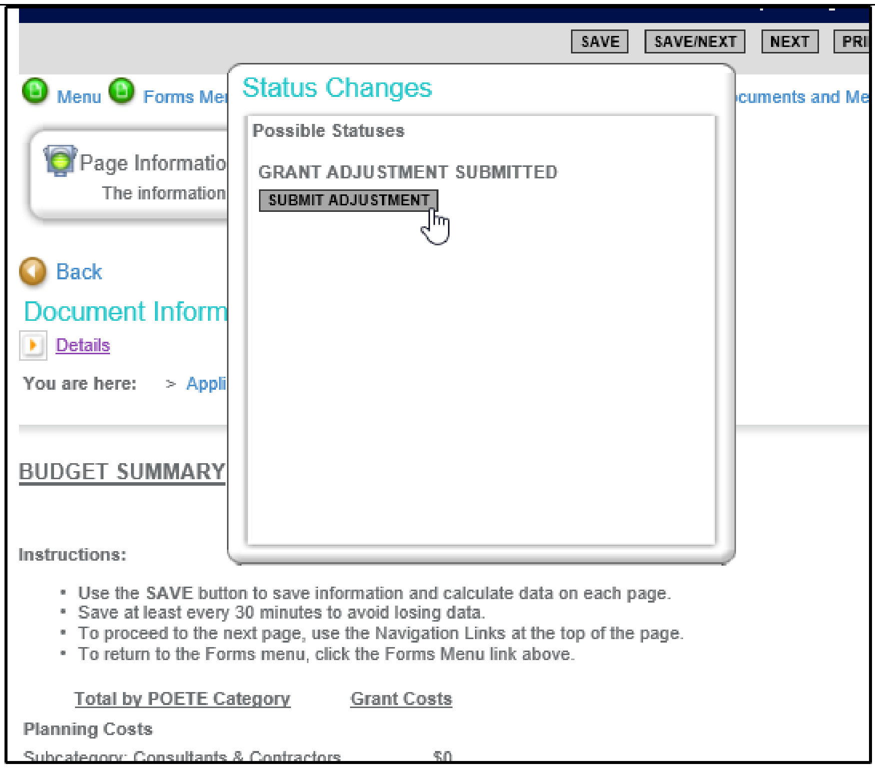
<table>
<tr><td></td><td>
</td></tr>
<tr><td>7</td><td>IDHS will review your request. If approved, your document status will be changed to Grant Adjustment in Process.

At this point, you may make modifications to the application forms that you indicated on your Grant Adjustment Notification Request form. Navigate to the appropriate forms in the Forms Menu, make the necessary modifications, and SAVE each page. Make the appropriate corrections for any page errors that appear.

In the case of a budget modification, certain fields will not be eligible to be modified. These fields will appear gray on their budget page and will be disabled from editing. New budget lines may be filled out to request funding for items that no longer match the description of the disabled fields. Remember to decrease the requested grant amount for any items that no longer apply. Do not adjust spending in areas that were not pre-approved by IDHS, and do not add additional funding above your approved Grant Amount.

An error will fire on submission of your Grant Adjustment if any row on any budget page is reduced to an amount less than what has already been expended. It is recommended that you reference the most recent Fiscal Report for the grant when completing your Grant Adjustment.

At the end of a budget modification, visit your Budget Summary form and verify that all requested Grant Costs amounts are correct.</td></tr>
<tr><td>8</td><td>When you have verified that all information in your document has been modified correctly, and all page errors have been cleared from your application forms, use the Status Changes menu to change the status to Grant Adjustment Submitted.</td></tr>
</table>



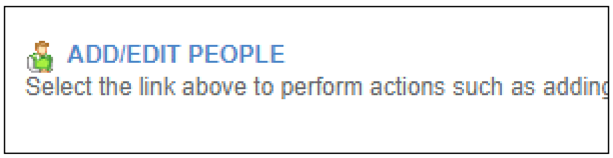
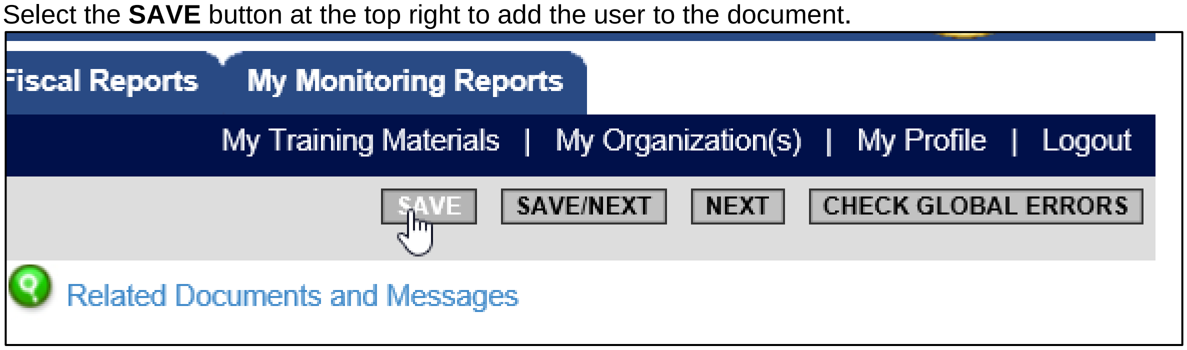
On the next screen, enter any notes you would like to submit along with the status change, and select **I Agree**.

MANAGE USER ACCESS TO DOCUMENTS

The SubGrantee Administrators are responsible for ensuring that appropriate users are assigned documents. For instance, staff may assist the SubGrantee Administrator with completing required forms. User access can be assigned or removed throughout a project's lifecycle. This section explains how to assign a user so that they can access a document as well as how to remove access to a document.

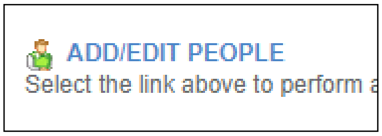
Assign User Access to Documents

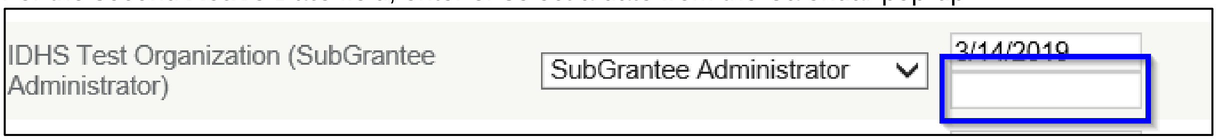
To access the IntelliGrants documents, or to assist with completing forms, the SubGrantee Administrator must add a user to the document by following these steps:

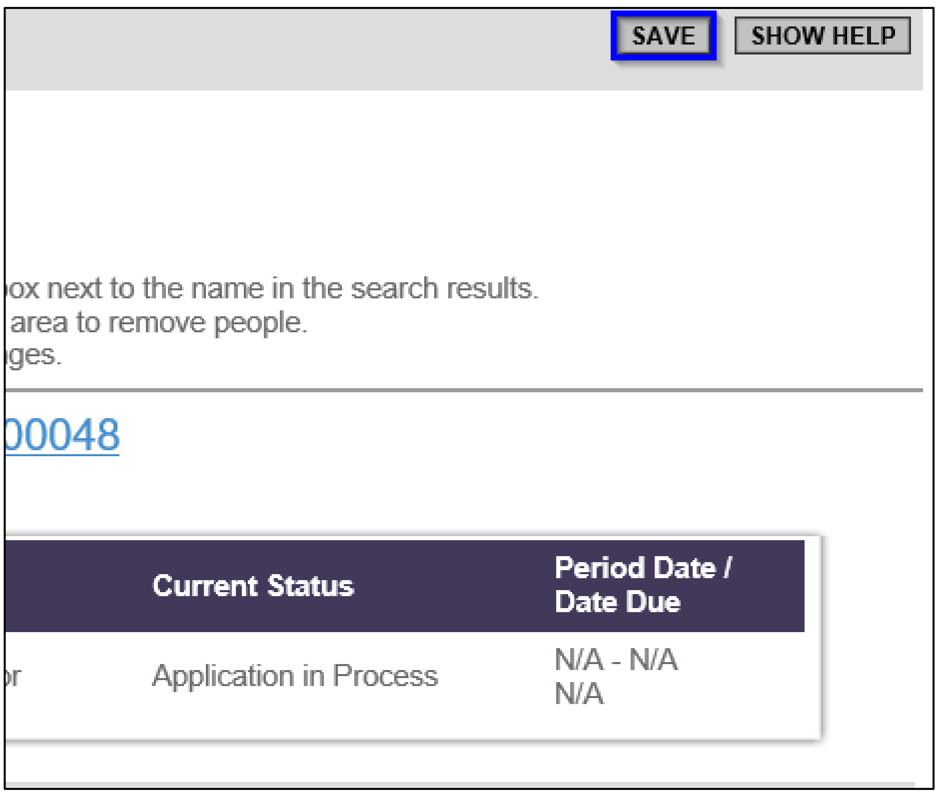
Step	Description
1	Navigate to the document to which you want to assign access.
2	Select **Management Tools**.
3	Select **ADD/EDIT PEOPLE**. 
4	Add the person by doing the following: 1. Enter the name or part of the user's name (at least three characters) in the **Person Search** field and then select **SEARCH**. 2. Check the checkbox next to the name of the person to add. 3. Display the **Role** drop-down list and select the role for the person. Be sure to select the correct role for the user that is being added to the document. The document will appear in the **My Tasks** section on the user's homepage, providing there is a task for the user's role to complete. 4. Enter the date to start allowing access to the document in the **Active Dates** field.
5	Select the **SAVE** button at the top right to add the user to the document. 

Remove User Access to Documents

To remove a user from a document, follow these steps:

<table>
<tr><th>Step</th><th>Description</th></tr>
<tr><td>1</td><td>Navigate to the document to which you want to remove access.</td></tr>
<tr><td>2</td><td>Select Management Tools.</td></tr>
<tr><td>3</td><td>Select ADD/EDIT PEOPLE.


</td></tr>
<tr><td>4</td><td>For the second Active Date field, enter or select a date from the Calendar pop-up.


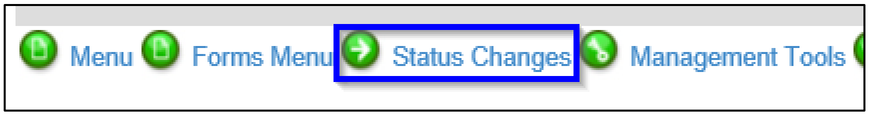
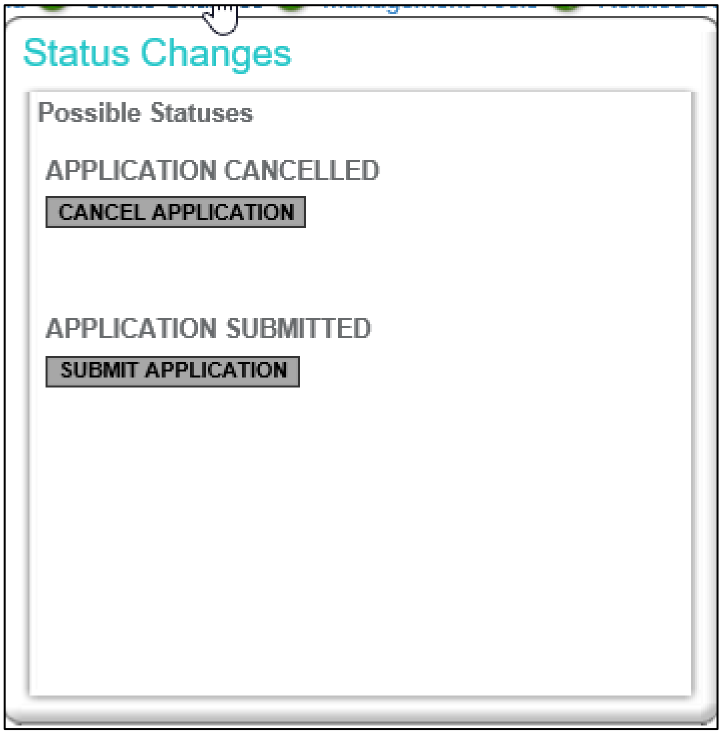
The user will not be able to access the document after the specified date.</td></tr>
<tr><td>5</td><td>Select the SAVE button at the top right to remove the user's access to the document.


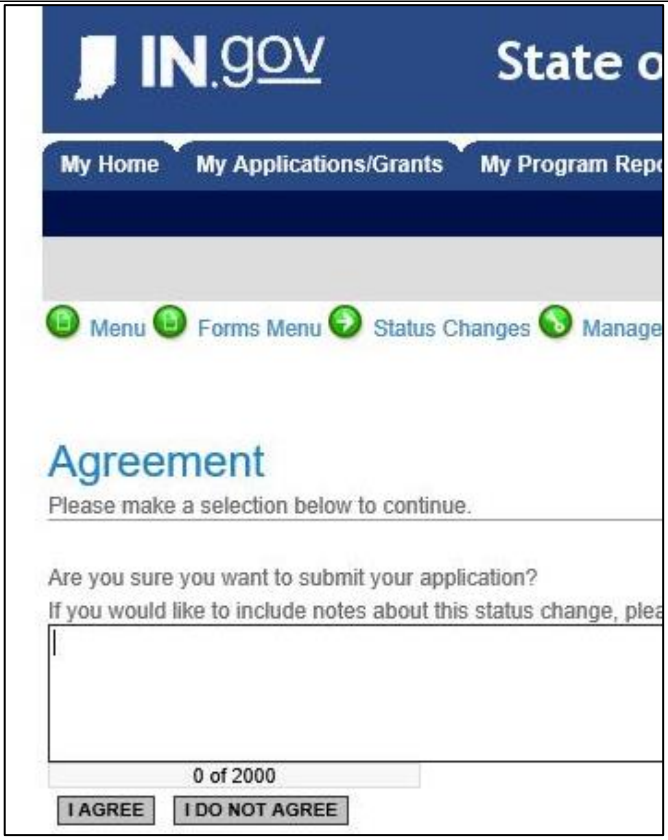
</td></tr>
</table>

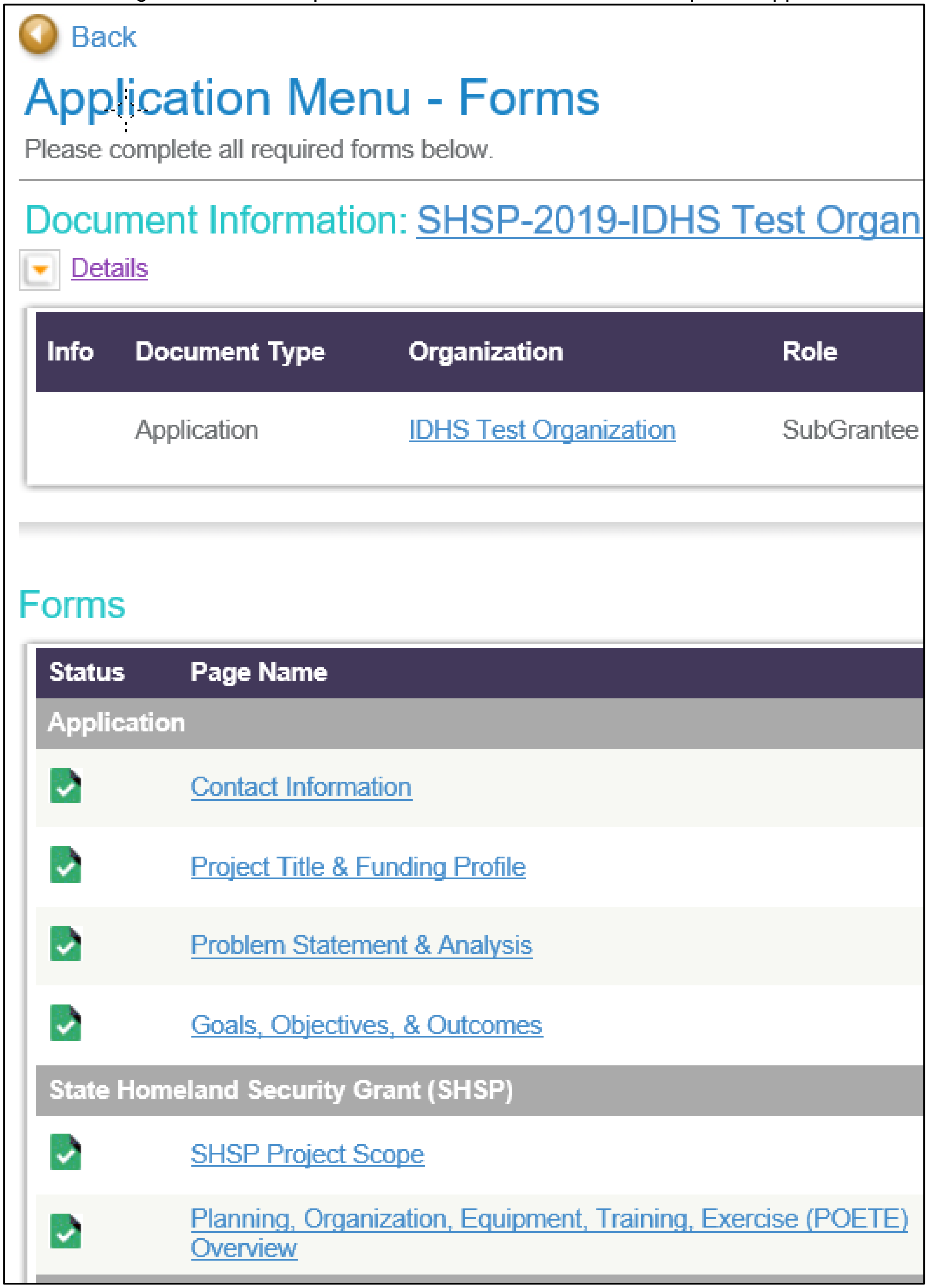
Make Status Changes

A SubGrantee Administrator or SubGrantee Project Director can push a document to the next status—for instance, to submit the application—by using the **Status Changes** section.

Follow these steps:

Step	Description
1	From anywhere within the application, select the **Status Changes** button. 
2	You see a list of possible statuses for the document. Select the status by selecting the appropriate button. 
3	After the **Submit** or **Cancel** option has been selected, an agreement will appear to confirm the status change. Select **I AGREE** to complete the status change.

	 IN.gov State o My Home My Applications/Grants My Program Repo Menu Forms Menu Status Changes Manage Agreement Please make a selection below to continue. Are you sure you want to submit your application? If you would like to include notes about this status change, plea 0 of 2000 I AGREE I DO NOT AGREE

<table>
<tr><td>4</td><td>Once the status change has been complete, the Forms Menu with the completed application will


appear.</td></tr>
<tr><td>5</td><td>After submission, the document will be assigned to be reviewed. The option to make changes to the application after it has been submitted must wait until a reviewer has sent the application back for modifications. A notification will be sent to your inbox when the review has been complete and what further information is needed.</td></tr>
</table>

Note: A SubGrantee Administrator can check the status history of a document or view the modification history by selecting **Management Tools** and then selecting **Status History** or **View Modification History**.