eGrants

eGrants User Guide

A Guide for Working in eGrants

Contents

Overview

This guide is intended for new eGrants users to learn how to set up their computer to access eGrants, access eGrants to fill out grant applications, report on program progress, view grant information, and perform other grant-related activities.

> **Relevant Links**
>
> TEA Office for Planning, Grants & Evaluation web site at http://www.tea.state.tx.us/index2.aspx?id=7775
>
> Grant Opportunities page at http://burleson.tea.state.tx.us/GrantOpportunities/forms/

Organization

This guide is organized into the following chapters:

- **Obtaining Access to eGrants** explains how to request access for the web site.
- **Setting Up Your Computer** explains how to set up your browser, Acrobat Reader, and other computer properties to best access information from eGrants.
- **Viewing Grant Opportunities** explains how to use the Grant Opportunities web page to view information about all TEA grants, including ones in eGrants.
- **Working in eGrants** explains how to use the computer interface to view grant information for your organization and to access grant-related materials.
- **Applying for a Grant** explains how to access and fill out grant applications.
- **Managing the Application** explains how to amend or revise an application, complete progress or compliance reports, view the document library, or exit eGrants.

eGrants Capabilities

eGrants is the online grants management application for the Texas Education Agency (TEA). eGrants has the following capabilities:

- Allowing the public or targeted audiences to view postings of available formula and discretionary grant monies
- Viewing complete information about grants in eGrants
- Initiating, preparing, and submitting completed grant application packages on the web
- Completing compliance, progress, and evaluation reports
- Processing amendments
- Viewing approved applications and amendments

■ Viewing a Notice of Grant Award (NOGA)

Obtaining Access to eGrants

This chapter outlines the security roles and privileges set up for eGrants and explains how to request TEA secure environment (TEASE) access and a Vendor ID. All external users must have TEA SE access and a Vendor ID to access the system.

Relevant Links

Request form for TEA SE access:

- [Online form](#) for employees of school districts, education service centers (ESCs), and open-enrollment charter schools at https://seguin.tea.state.tx.us/appsng/um/apply.aspx

- [Paper form](#) for all others at http://ritter.tea.state.tx.us/forms/tease/egrants_ext.htm

[Texas Application for Payee Identification Number](#) at http://www.window.state.tx.us/taxinfo/taxforms/ap-152.pdf

[TEASE logon screen](#) at https://seguin.tea.state.tx.us/apps/logon.asp

[eGrants TEASE information center](#) at http://www.tea.state.tx.us/opge/egrant/

Requesting a Vendor ID

Before requesting that a Vendor ID be assigned by the Office of the Texas State Comptroller, consult with your business office to ascertain whether your organization has previously been issued a Vendor ID. If your organization has not been issued a Vendor ID, you can obtain one by completing the **Texas Application for Payee Identification Number.** A link to the form is included in the [Relevant Links](#).

1. Complete the entire Texas Application for Payee Identification Number form lines 1–15. Be sure to provide an individual work email address. Do not use a group email address.

2. Sign the Texas Application for Payee Identification Number form on line 14.

3. Fax the form to eGrants Support at the number listed in [Requesting TEASE Access](#).

Requesting TEASE Access

To access eGrants, all external users of the eGrants system must complete a **TEASE Request for Access** form to be approved by TEA. TEASE access will provide you with a username and password to access eGrants.

On the Request for Access form, you must provide the Vendor ID number assigned to your organization by the Texas Comptroller's Office. Links to the TEASE Request for Access form and the

---

Texas Application for Payee Identification Number are included in the Relevant Links. For instructions on completing the Texas Application for Payee Identification Number, see Requesting a Vendor ID.

If you are an employee of a school district, an ESC, or an open-enrollment charter school whose superintendent has User Admin+ to perform online approval, you must fill out the form online. The paper form will not be accepted. All others can fill out the paper form. This section includes instructions for both forms.

Applying Online

If you are an employee of a school district, an ESC, or an open-enrollment charter school whose supervisor has User Admin+ to perform online approval, you must apply for eGrants access using the online form. To apply online, do the following:

1. Go to the online form at https://seguin.tea.state.tx.us/appsng/um/apply.aspx.

2. Under **Select Application,** select **eGrants Production.**

3. Complete the form. Information about the roles and permissions is available from within the application.

4. Click **Submit.** The form is forwarded to your superintendent for submission before being forwarded to TEA. Once the request is approved and processed, you will receive an email with your username and password.

Completing the Paper Form

If your organization is nonprofit, Communities in Schools, college, or university or your school supervisor does not have User Admin+ to perform online approval, you must apply for eGrants access using the paper form. To apply using the paper form, do the following:

1. Click on **Apply for eGrants Logon** on the **eGrants Toolbox** web page or select the paper form at http://www.tea.state.tx.us/forms/tease/egrants_ext.htm.

2. Complete the form. See Understanding TEASE Roles and Privileges for information about the TEASE roles.

3. Print the form.

4. Obtain a signature from your superintendent or chief executive officer.

5. Fax or mail your TEA SE Request for Access form to the following:

    eGrants Support
    Texas Education Agency
    Office for Planning, Grants, and Evaluation
    1701 N. Congress Ave
    Austin TX 78701-1494
    Fax (512) 463-9564

Understanding TEASE Roles and Privileges

If you are a user of the eGrants system, you will request and will be assigned a role when you complete a TEA SE Request for Access form. Functionality that is not included in the assigned role will not be visible or will be visibly disabled. Each role has been assigned specific privileges to perform specific tasks in the eGrants system. The table below illustrates the roles that can be assigned.

Role Name	Role Privileges Listed by System
Grantee Official Requestor/Grantee authorized official with authority to submit (i.e., sign) the grant applications and bind the applicant in a contractual agreement (usually the district superintendent or executive director); has all privileges: can write, certify, and submit applications, compliance reports, and expenditure reports	**eGrants** ■ View program summary, guidelines, and instructions ■ View, create, save, and print grant applications (including designation forms and supporting forms) ■ Certify and submit grant applications and amendments (including designation forms and supporting forms) ■ View NOGA **Reporting** ■ View, edit, save, and print compliance, progress, and evaluation reports ■ Certify and submit compliance, progress, and evaluation reports, and special collections reports
Grantee Manager Requestor/Grantee manager (local project manager or business manager; this is usually the primary and the secondary program contact as well as the business manager)	**eGrants** ■ View program summary, guidelines, and instructions ■ View, create, save, and print grant applications (including designation forms and supporting forms) ■ Certify and submit grant applications during negotiation ■ View NOGA **Reporting** ■ View, edit, save, and print compliance, progress, and evaluation reports ■ Certify and submit compliance, progress, and evaluation reports and special collections reports

Role Name	Role Privileges Listed by System
Grantee Staff Requestor/Grantee staff (includes program staff employees or contract personnel and business office staff who only need to view the application but need to write or edit the compliance, progress, or evaluation reports)	**eGrants** ■ View program summary, guidelines, and instructions ■ View and print grant applications (including designation forms and supporting forms) ■ View NOGA **Reporting** View, edit, create, save, and print compliance, progress, and evaluation reports, and special collections reports
Grantee Writer/Editor Grantee Writer/Editor—Requestor/Grantee writer/editor (employee or contracted personnel) assigned to write and edit the application	**eGrants** ■ View program summary, guidelines, and instructions ■ View, create, edit, save, and print grant applications (including designation forms and supporting forms) ■ View NOGA
Grantee Viewer Requestor/Grantee viewer (staff with read-only access to grant applications and compliance, progress, and evaluation reports); cannot take any action on behalf of the applicant	**eGrants** ■ View program summary, guidelines, and instructions ■ View and print grant applications (including designation forms and supporting forms) ■ View NOGA **Reporting** View and print compliance, progress, and evaluation reports and special collections reports
ESC Viewer ESC staff with view rights to grant applications and reports except for competitive grants	**eGrants** ■ View program summary, guidelines, and instructions except for competitive grants ■ View and print grant applications (including designation forms and supporting forms) except for competitive grants **Reporting** View and print compliance, progress, and evaluation reports, and special collections reports except for competitive grants

Setting Up Your Computer

This chapter shows you how to set up your computer defaults to ensure clear navigation and proper functionality of the eGrants system. This chapter also provides information about supported hardware and software and about eGrants availability.

Relevant Links

Grant Opportunities at http://burleson.tea.state.tx.us/GrantOpportunities/forms/
GrantProgramSearch.aspx

Acrobat download at http://get.adobe.com/reader/

Introduction

Supported Platforms

The required browser is Internet Explorer. Using Netscape may cause eGrants not to perform properly. If Internet Explorer is not on your computer, we recommend that you have your network administrator install it. However, you can download it free of charge at http://windows.microsoft.com/en-US/internet-explorer/downloads/ie.

eGrants supports only the systems and browsers listed below.

Supported Operating Systems

Windows 7

Supported Browsers

Internet Explorer 7.0 or 8.0.

Availability of eGrants

TEA runs full back-ups twice nightly starting at approximately 8:45 p.m. and ending at approximately 9:30 p.m. In addition, transaction logs are backed up during the day at 5:45 a.m., 12:45 a.m., and 7:45 p.m. During these periods, eGrants may not be available, or performance may be slow.

Note: eGrants will time out after 20 minutes if no activity has taken place. You will need to log on again. Please note that any information entered into schedule forms after the system has timed out will not be saved when you exit the system.

Setting Up Internet Explorer

To increase efficiency while working within eGrants, TEA has a recommended set of Internet Explorer settings. The following sections will assist you in setting up Internet Explorer with the recommended configuration.

Checking the Browser Version

eGrants will work best if you use the correct browser version. Follow these instructions to check the version:

1. Open your Internet Explorer browser.

2. Select **Help> About Internet Explorer.**

The following window appears:

3. Make sure that the version of Internet Explorer is 7.0 or later.

- If the computer has an earlier version, have your local computer support personnel upgrade your Internet Explorer version.

- If the computer has the correct version, click the **OK** button.

Setting Internet Options

Use these steps to set the Internet Options so that eGrants will operate correctly:

1. From Internet Explorer, select **Tools> Internet Options.**
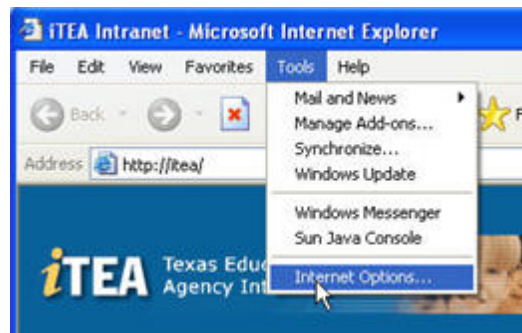
The following window appears:
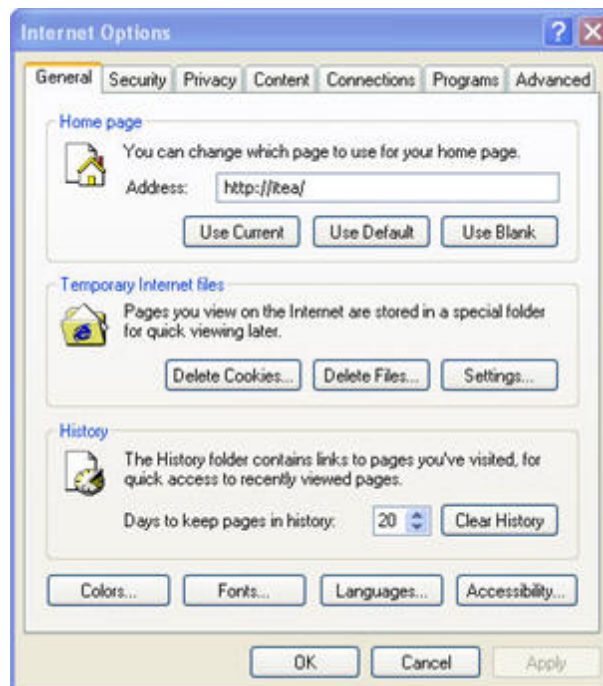
2. In the **Temporary Internet files** pane, click the **Delete Cookies** button.

3. Click the **OK** button to confirm that you want to delete the cookies.

4.   Click the **Delete Files** button to delete the temporary internet files.

5.   Click the **OK** button to confirm that you want to delete the files.

6.   In the **Temporary Internet files** pane, click the **Settings** button.
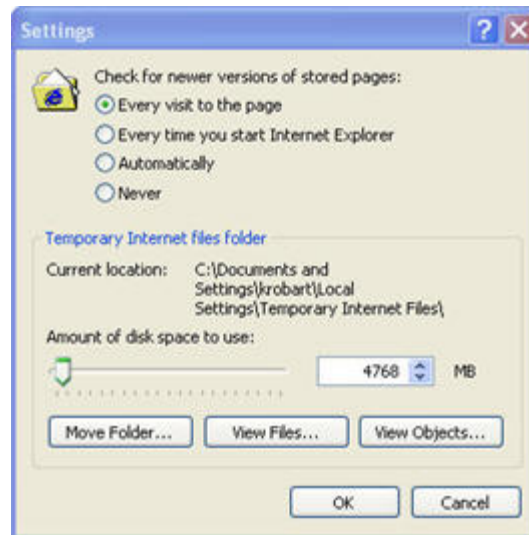
7.   Select the setting **Every visit to the page.**

8.   Click the **OK** button.

9.   In the **History** pane, reduce the **Days to keep pages in history** to **1.**

10. Click the **Advanced** tab.
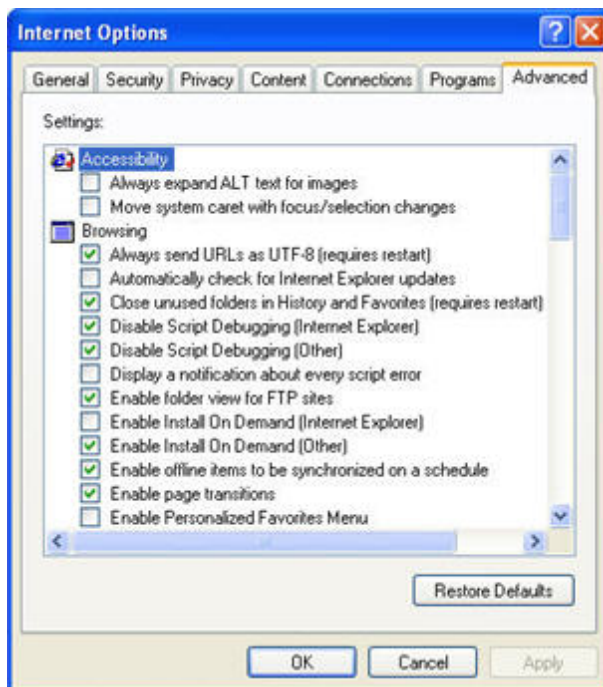
11. Check the setting **Reuse windows for launching shortcuts.**

12. Click the **OK** button again, and the setup is complete.

Setting Up Adobe Acrobat Reader

Adobe Acrobat Reader is an essential support program for the eGrants system. Reader allows you to access and view important support documents, including the Application Guidelines, Schedule Instructions, and combined schedule sets that will assist you in navigating through the eGrant application process. The eGrants system also requires the use of Reader to view the grant application forms and compliance/evaluation reports via eGrants once they have been submitted using the document library. The following steps will assist you in setting up the Reader on your computer.

Verifying the Most Recent Version

Acrobat Reader is used to view the grant applications and their associated attachments in the document library.

Click **Start > Programs > Acrobat Reader** on your desktop

■ If Adobe Acrobat Reader is on your computer, do the following:

From the Acrobat Reader menu, select **Help> About Acrobat Reader**.

The following window appears:
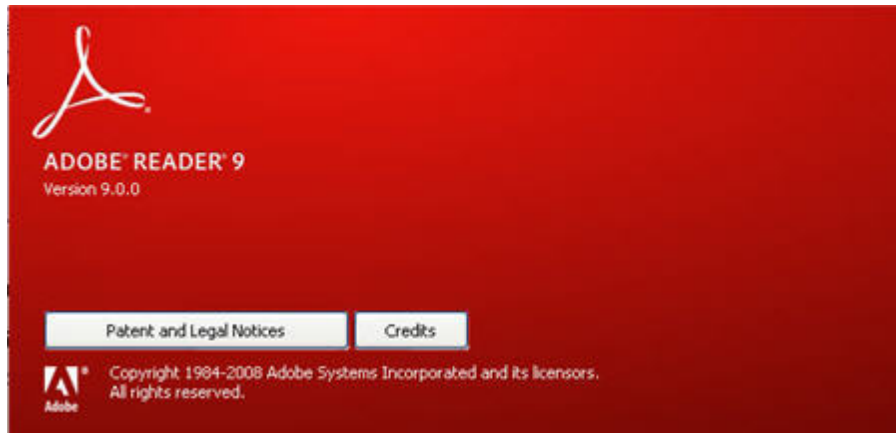
Version 6.0 or later is required to view PDFs from the document library.

- If Acrobat Reader is not on your computer, you can <u>download it</u> for free at http://get.adobe.com/reader/.

Setting Up Acrobat Reader

eGrants document library performs best using Acrobat Reader 6.0. Please upgrade your software to 6.0 to increase performance. In addition, there is a setting in the Acrobat Reader that will speed up the process of opening large PDF forms.

1. Click on **Edit > Preferences** in your menu bar.

2. Select **Preferences > Accessibility**.

3. Clear the checkbox in the **Tab Order** pane. Doing so will increase the speed in which PDF forms open.
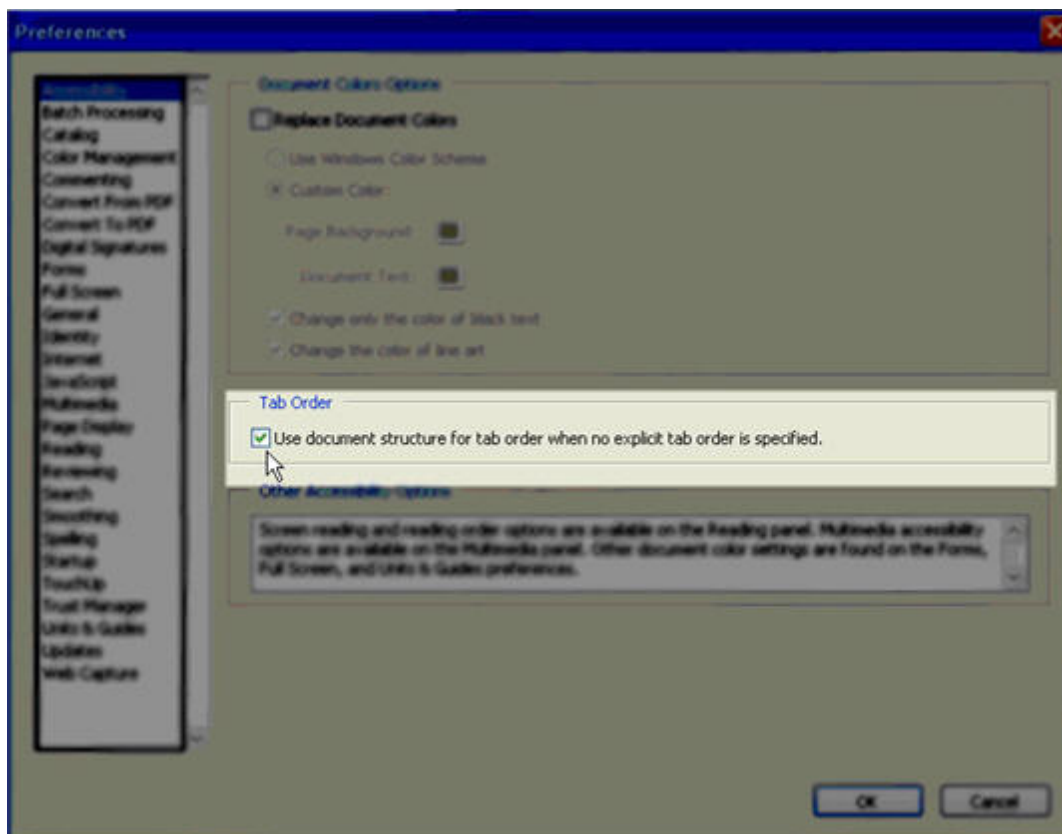
4. Click **OK.**

Turning Off the Acrobat Caching Feature

If you have Reader 6, you must turn off the caching feature as follows:

1. Select the appropriate one of the following menus:

   - If you have Acrobat Reader 6 or 9, choose **Edit>Preferences>Forms.**
   - If you have Acrobat 6, choose **Edit>Preferences>General>Forms.**
   - If you have Acrobat 7, choose **Edit>Preferences>Forms.**

2. Clear **Keep forms data temporarily available on disk.** (Acrobat 5 does not have this feature.)

Turning Off Third-Party Popup Blockers

For the eGrants document library to work properly, disable all third-party pop-up blockers. A pop-up blocker is a browser add-in that prevents pop-up advertisements from appearing. It also prevents documents from being viewed from Content Services.

User-Installed Popup Blockers

Different pop-up blockers are disabled differently. There is one on the default TEA web site, but it is turned off by default. Any others are user-installed, so you are responsible for knowing what they are and how to turn them off.

The Google Toolbar Popup Blocker

From the Personal Work Manager, find the Google toolbar. Click the **# blocked** button and turn off **Disallow pop-ups.** Pop-ups will then be allowed whenever you are accessing sites on the same server.
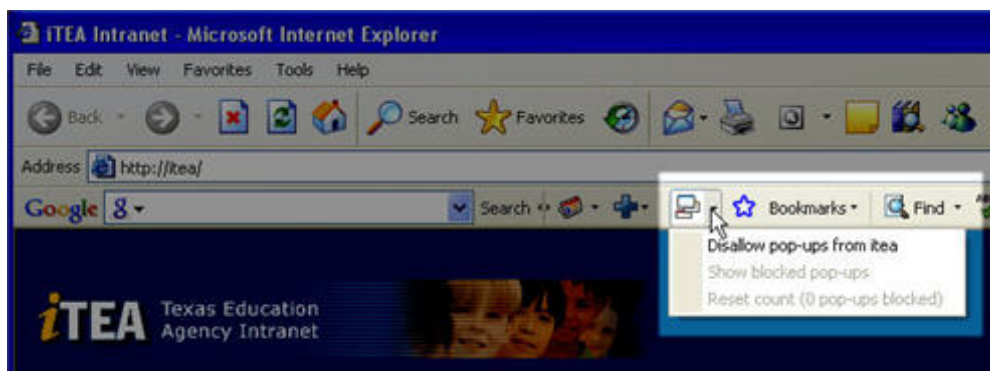
Viewing Grant Opportunities

Although not actually part of eGrants, the **Grant Opportunities** page provides useful information about grant opportunities, grants management, or grant application processes, including deadlines, links to instructions and guidelines, and so on. It is a page that anyone can view without a login. This page will be an important source of information about grant opportunities. Since you are responsible for keeping up to date on grant information affecting your organization, you may want to bookmark the site.

The page provides a centralized location for all TEA grant opportunities, whether the grant is available through eGrants or by paper application. The page is designed to provide more complete information about grant programs and to make it easier to find information about TEA grant processes than the previous pages.

Opening the Grant Opportunities Page

Select the Grant Opportunities page at http://burleson.tea.state.tx.us/GrantOpportunities/forms/GrantProgramSearch.aspx.

The page is organized into panes that provide useful information about different types of TEA grants, including those that are in eGrants and those that are still in paper form.

Getting Assistance

You can see Help files for this page by clicking **Help?** at the top of the page.

You can find general grant resources by clicking the **TEA Grant Resources** link at the top of the page.
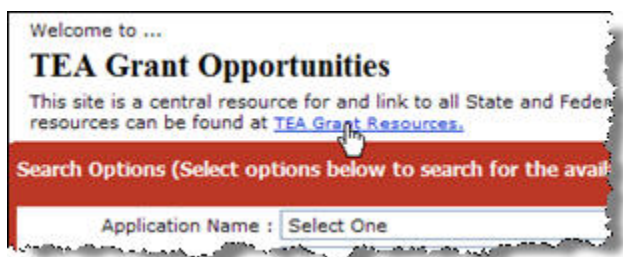
Searching for a Grant Opportunity

To find information on grant opportunities for previous years, use the **Search Options** pane.

To search for a grant opportunity, do the following:

1. Select one or more of the following criteria:

    •   Name of the application

    •   Program or subject area

    •   Status of the grant posting

    •   State, Federal, or Other for type of funding

    •   Application type (discretionary competitive, discretionary noncompetitive, discretionary continuation, or formula)

    •   School year

    •   Availability or due dates

        If you want to limit the search by dates, type in the dates of inclusion or select them by clicking on the calendar icon for either **Availability Date** (the date the application will be available to fill out) or **Due Date** (the date the completed application is due to TEA).

2. Click **Search.**

3. If you get no results or do not get the results you anticipated, broaden or change your search criteria and try again.

To clear your selections and start again, click **Clear.**

Understanding the Search Results pane

> **Note:** Dates are subject to change until the grant application is finalized. Check back periodically to get up-to-date information.

Status - "Tentative" indicates that the dates displayed are the projected dates of availability only. The deadline date is subject to change until the Grant Application is finalized and available for distribution/publication. Prospective applicants are responsible for obtaining the most current information on this website.

If your search results return more than one grant, the **Search Results** pane provides information in the following columns:

- **View:** the magnifying glass icon, which you click to open the program details
- **Name of Grant Application:** the grant school year and program name
- **Availability Date:** the date the grant application is available for completion
- **Due Date:** the date the completed application is due to TEA
- **Application Type:** discretionary competitive, discretionary noncompetitive, discretionary continuation, or formula
- **Availability:** application available through eGrants (identified by the eGrants logo) or paper RFA
- **Status:** status of the grant dates (tentative, confirmed, or revised)

Viewing Grant Details

To view the details of a grant program, click on the magnifying glass icon next to the grant name in the **Search Results** pane. The **Grant Details** page appears.

> **Note:** If you pick a specific grant name from the **Application Name** field in the **Search Options** pane, the **Grant Details** page appears immediately.

This page provides most of the information you need to apply for the grant, including links to the grant application documentation.

The **Grant Details** page provides the following information, posted as it becomes available:

- **Header:** the name, year, and cycle of the grant program, its RFA number (for competitive grants), its SAS number, and a brief description of how to apply for the grant

- **Program Information:** a brief description of the program, a list of eligible applicants, and the authority under which the program was created

- **Funding Information:** the expected number of awards; the minimum and maximum allowable awards, if applicable; the cost sharing or matching requirement, if applicable; the amount of funds available for the project from each source; and the sources of the funds, and the grant start and end date

- **Application and Support Information:** pertinent information about the application, including the guidelines, instructions for completing the application, provisions, and selection criteria

  To open any of these documents, click on the links.

- ■ **Critical Events:** a list of important dates, such as application and report due dates
- ■ **Contact Information:** the names and contact information for program, funding, program evaluation, and electronic access issues.

Working in eGrants

This chapter explains how to log on to eGrants and provides a tour of the eGrants user interface. It also provides instructions for basic tasks that you will need to perform in eGrants.

> **Relevant Links**
>
> Planning, Grants, and Evaluation at http://www.tea.state.tx.us/ index2.aspx?id=7775
>
> TEASE Logon at https://seguin.tea.state.tx.us/apps/logon.asp

Logging On to eGrants

1. Log on through TEASE at https://seguin.tea.state.tx.us/apps/logon.asp.

    The TEASE log on page appears:

2. Type your username.

3. Type your password.

4. Click **Continue.**

> **Note:** If you try to log in and our system does not have your organization in the database, an error message appears: The system cannot find your organization information. Contact TEA by emailing eGrants@tea.state.tx.us. Please provide your complete contact information.
>
> Check your login information again, and if it does not work, contact TEA.

If your login is successful, an application list opens. This list contains different items depending upon the programs for which you have requested TEASE access.
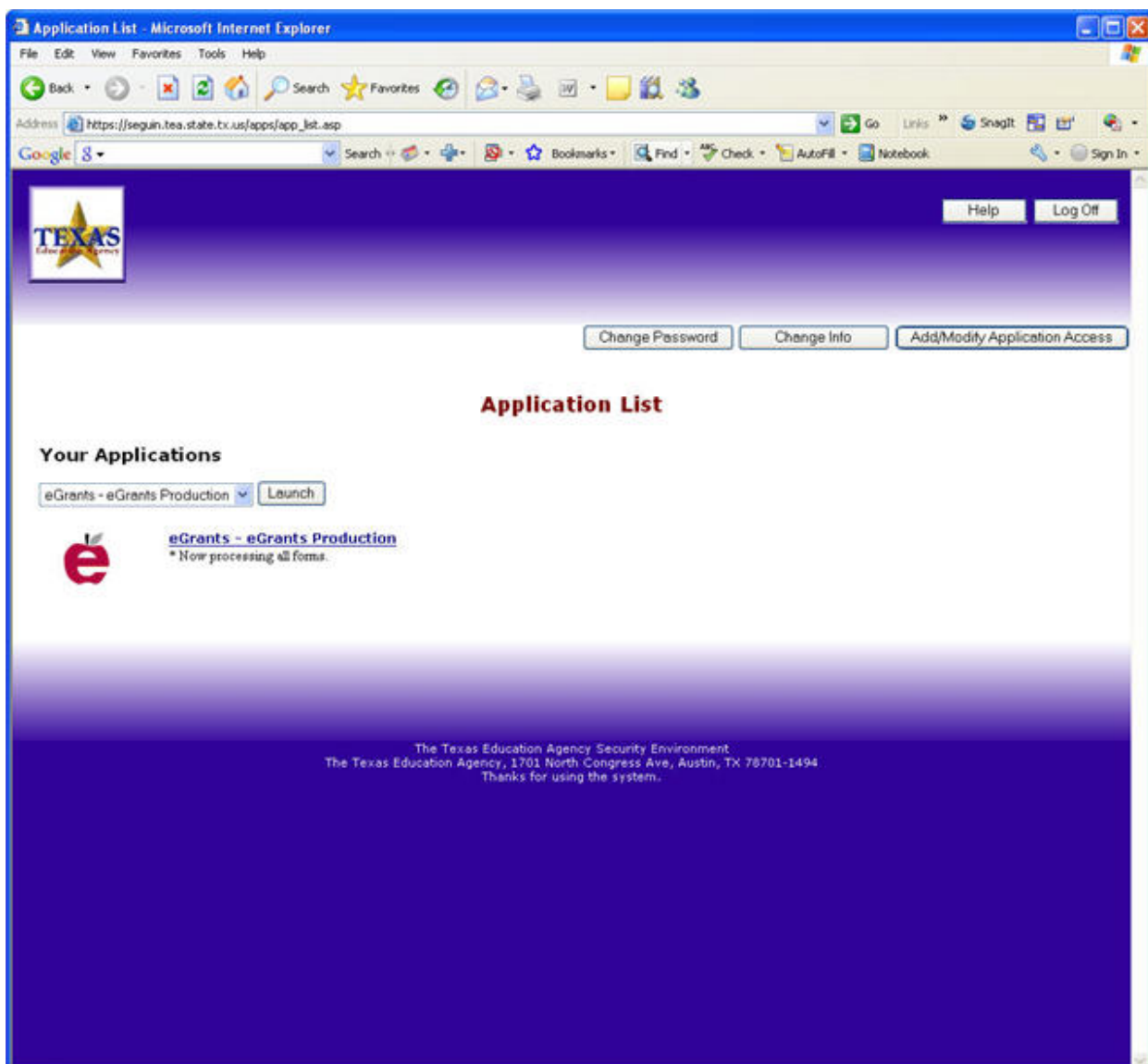
You can open eGrants one of three ways:

- By selecting it from the drop-down menu

  The default in the pull-down menu is the first application that appears on the page under the pull-down menu box. Select **eGrants** from the list, then click the **Launch** button.

- By clicking on it from the list of applications below the menu

- By clicking on the eGrants logo.

The first time each day that you log on, a security page appears.

From this page, you can access other applications, change your password, change the verification information for your password, or log off. Press the **Help** button for more information.

Review the security assurances and click **I Agree** to continue.

Introducing eGrants

eGrants provides easy access to the grant applications for which your organization is eligible and to a great deal more useful information about grant programs in eGrants.

The main menu at the left of the interface allows you to select either the **Resources** page or to exit eGrants.

- ◼ The main page of the new eGrants application is called the **Grantee Profile.** It provides a centralized view of all your eGrants activities, links to grants you have in process, and access to initiate new grant applications for which you are eligible.

- ◼ The **Resources** page returns you to the **TEA Grant Resources** page.

The **Grant Menu** page appears after you select a grant program from the **Grantee Profile.** It provides links to the forms and applications available under that program, as well as information about that particular program.

Although all new eGrants appear in the new interface, older grants still have their original appearance. So, your views as you view grants will be different depending upon whether the grant is an older one However, the **Grantee Profile** and **Grant Menu** pages are the same for both types of grants. Eventually, all new grants will be converted to the new interface.

Getting Assistance

Besides this guide, eGrants provides several ways that you can get assistance in working with or completing an application:

- ◼ **Look at the Help files:** Click on the **Help?** button at the top of the page to see the complete Help files for eGrants. These Help files include a table of contents, index, and search facility for finding topics.

- ◼ **Look at the Resources:** Click on **Resources** on the main menu to view general grant resources.

- ◼ **View the Legend:** Look at the Legend on each page to understand the symbols used on that page.

- ◼ **Click on the i icon:** Click on the i icon to get information for a particular pane.
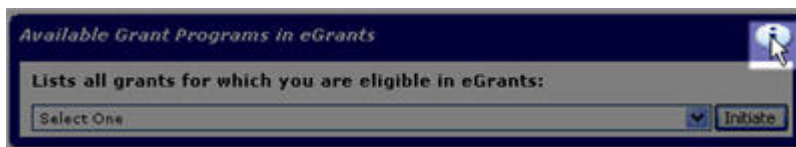
Click the X on the top border of the box to close it.

- **Click on the Help button:** Click on the Help button for some panes where you might need additional instructions and guidance about statutes.

- **View complete instructions or other program documents:** Check the **Program Information** pane on the **Grant Menu** page (or on the **Grant Opportunities** page) for documents that may answer your questions. Click on a document to open it.

- **View schedule instructions:** Once you have selected a schedule in a grant application, click the **Instructions** button to view the instructions for that schedule.

- **Ask the program contact:** You can call or email the person listed under **Contact Information** to get answers to your questions.

Exploring the Grantee Profile

The **Grantee Profile** page provides access to the grant applications for which your organization is eligible and a great deal more useful information about grant programs than the old main page did.

After you log on to TEASE and select **eGrants,** you will see one of two **Grantee Profile** pages, depending upon your privileges:

- If you are an education service center (ESC) or a TEA employee, you will see the following page:

Type in either the county-district number or the Vendor ID for the district whose applications you would like to view, and then click **Search.** The **Grantee Profile** page for the district appears:

- If you are any other kind of viewer, the **Grantee Profile** page for your organization or district appears immediately:
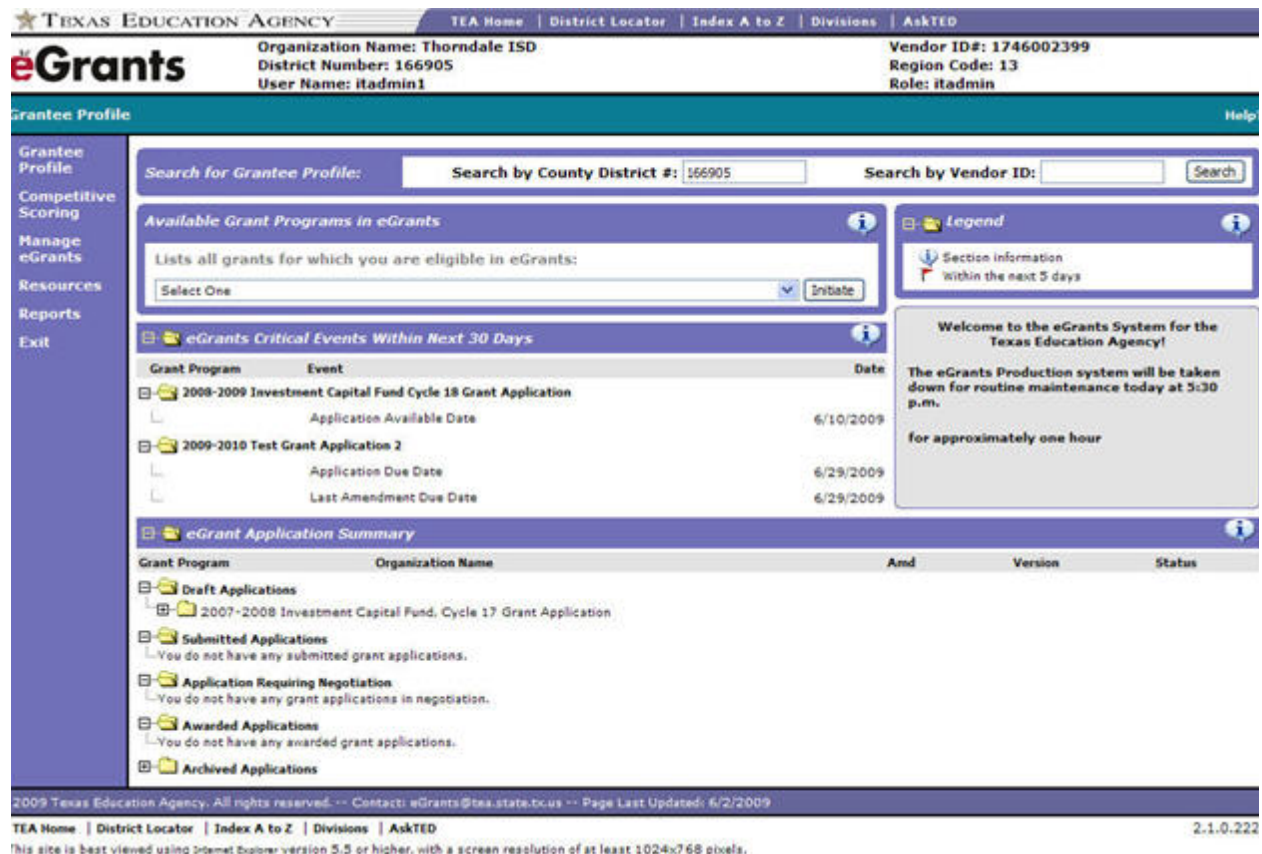
- ■ **Available Grant Programs in eGrants:** provides a list of and access to the grant programs for which your organization is eligible.

  Each available program appears in this list until the date the application closes.

- ■ **Legend:** provides the key to the icons that appear on the page.
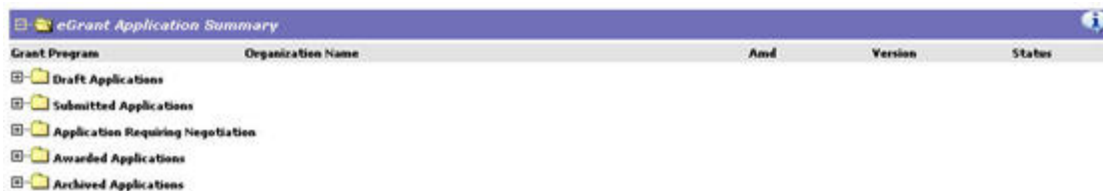
■ **eGrants Critical Events Due in Next 30 Days:** shows events that are coming up within the next 30 days for all grants for which your organization is eligible.

Many of these events require action on your organization's part. The events are organized in folders by grant program and show the name of the event and the due date.

■ **Messages:** provides messages about down times and other system information.

■ **eGrant Application Summary:** contains the applications that your organization has in process, sorted by status.

Opening and Closing Folders

By default, the folders in some panes are open and some are closed. For example, most of the folders in the **Grant Application Summary** pane are closed. You have to open a folder to view its contents. To open a folder, click on the plus sign next to it.

The plus sign changes to a minus sign. To close the folder, click on the minus sign next to it.

Folders throughout the eGrants interface work the same way.

Understanding Status Information

Once you open a folder under **eGrant Application Summary,** you can see the organization name, the amendment version, and the status of the grant, as follows:

Status	Description
Adjusting	The application was unlocked by TEA to allow TEA staff to make changes to it.
Available	A blank application is available.
Awarded	A grant was awarded and a NOGA issued.
Change Designation	The application was unlocked by TEA to allow changes to the GS2200-Shared Services Arrangement schedule. The Applicant Designation and Certification (ADC) form must be negotiated to make changes to the form before changing the application.
Delete Designation	The application was unlocked by TEA to allow changes to the GS2200-Shared Services Arrangement schedule to Not Apply at All. The Applicant Designation and Certification (ADC) form must be negotiated to make changes to the form before changing the application.
Draft	The draft application is saved.
In Process	The application is in review.
Negotiating	The application was unlocked by TEA for you to make specific changes at the request of TEA.
NOGA Approved	The application was approved by TEA.
Not Funded	The competitive application was not approved for funding.
On Hold	The application was placed on hold by TEA.
Received	The application was received by TEA.
Rejected	The application was rejected by TEA.
Submitted	The application was submitted to TEA. You may not make changes once it is submitted.
Voided	The amendment you submitted was not necessary and has been voided.

Accessing a Grant

To access a new grant or a program that is still open, do the following:

1. On the **Grantee Profile** page, click the click the arrow under **Available Grant Programs in eGrants** and select the grant program from the list.


2. Click **Initiate.** This action opens the **Grant Menu** page for that grant.

You can also open it by clicking on the grant application name in the **Grant Application Summary** table and then clicking on an underlying file.

To view a document for a grant that is already retired, scroll down to the bottom of the **Grantee Profile** page, open the **Archived Applications** folder, and select it from the list.

Touring the Grant Menu Page

Depending upon whether you are accessing a grant that is converted to the new eGrants interface or that is in the legacy interface, the **Grant Menu** page looks slightly different. The difference is that for legacy grants, the eGrants **Application Table of Contents** is replaced by an **eGrants Application** pane, which does not include the links to the schedules for completing the grant. If you want to complete the schedules, you must select the grant application name from the **eGrants Application** pane. This takes you to the **Schedule Index** page of the legacy eGrants. For more about that page, see Comparing the New and Legacy eGrants.

The **Grant Menu** page displays all the related forms and information for the grant program selected from the Grantee Profile main page.

Forms are grouped in the following categories, some of which are only visible if a form is available:

■ **eGrant Special Collections:** lists and provides access to forms used to collect data related to the grant program. For example, if a report is required, it appears in this pane.

- **eGrants Designation Forms:** lists and provides access to the Application Designation Certification (ADC) form and the Campus/Site Designation and Grant Writer Assignment (GWA) form for your grant, if applicable.

  The grant application will not appear on this page until you have filled out and submitted the ADC form.

- **eGrant Application:** provides a summary of important information about the grant, including the date and time it is due to TEA.

  The second portion of the eGrant Application pane provides access to and status for each application schedule.

The rest of the page is organized in the following panes:

- **Legend:** provides a key to the icons used on this page

- **Contact Information:** provides program contact information for the grant.

    You can begin an e-mail message for the program contact by clicking on the e-mail address.

- **Program Information:** provides links to the application guidelines, the schedule instructions, announcements, and other pertinent information for the grant program.
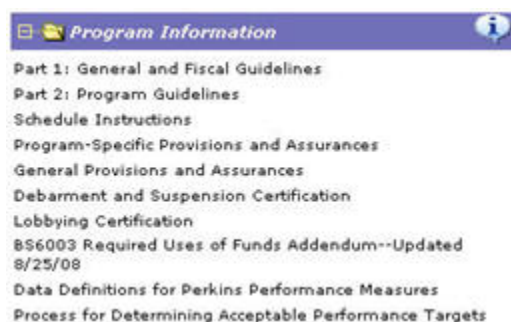
- **Calendar of Events:** shows all the events, the reporting period if the event is a report, and the due date.

- **Document Library:** shows all of the documents associated with a grant that have been submitted and archived in Content Services. Documents are all those submitted as part of a grant application as well as reports and other forms. Clicking on the link opens the **Document Library.**
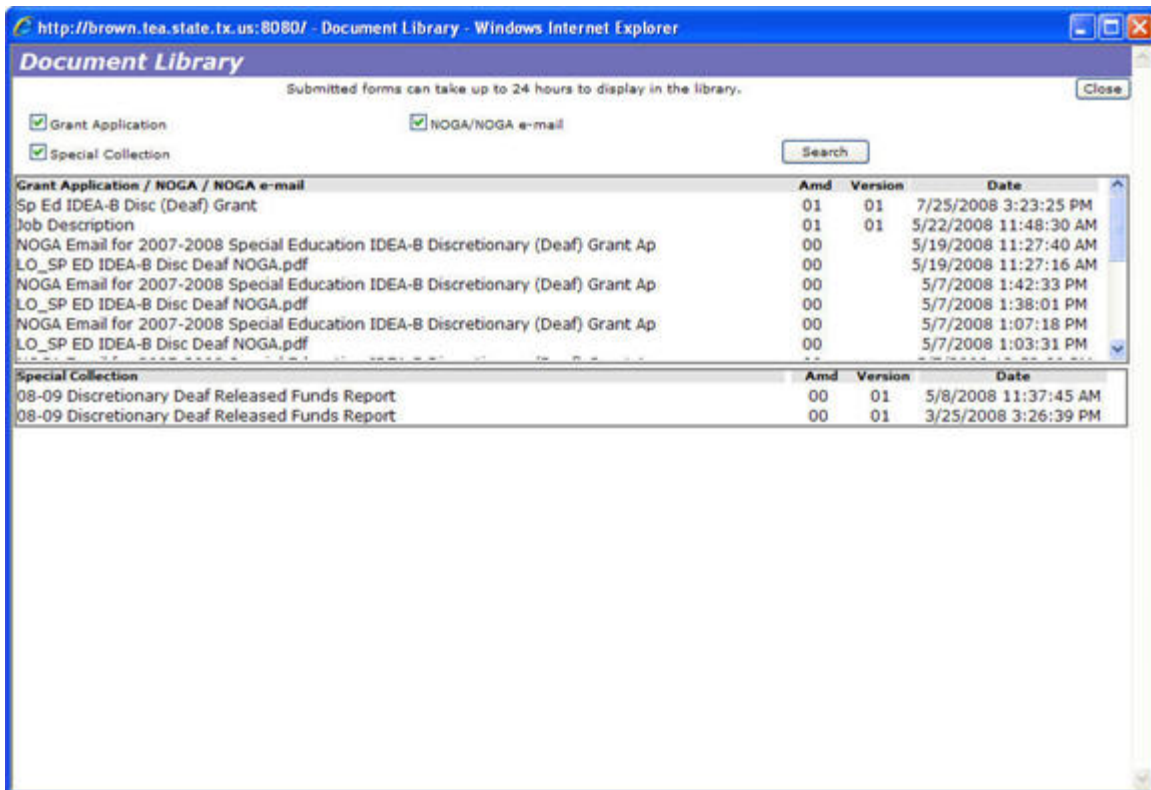
> **Note:** It can take up to 24 hours for a submitted document to appear in the **Document Library.**
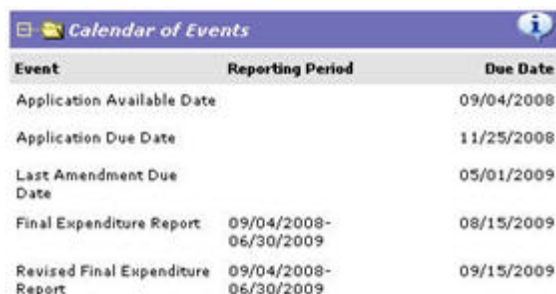
Checking the Calendar of Events

The Calendar of Events pane provides information about deadlines for the particular grant program. By default, the calendar is closed when you first open the page.

Click the plus sign next to the name to open the calendar:

The calendar opens to show all the upcoming events:

- ■ **Event:** the name of the event
- ■ **Reporting Period:** the inclusive period for reports
- ■ **Due Date:** the deadline for the activity or report

Completing Designation Forms

If the menu of schedules does not appear in the **eGrants Application** table of contents when you select a grant program, you must complete a designation form before you can have access to the application itself. The designation form may be an ADC form, which indicates your organization's relationship to a shared service arrangement (SSA), or it may be a campus/site designation and grant writer assignment (GWA) form, which designates the campus or site and the author of the grant.
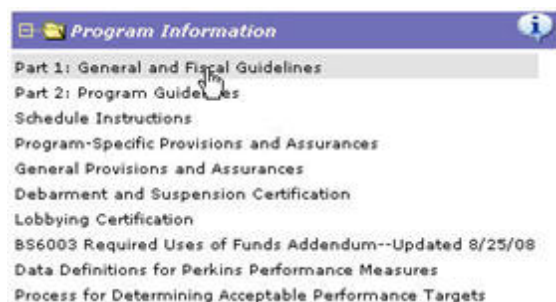
In any case, if a designation form is required, it appears under **eGrants Designation Forms** at the top of the **Grant Menu** page.

Click on the form to open it. You must complete it and save it before you can open any schedule for the application.

Accessing Instructions or Other Documents

The **Program Information** pane on the **Grant Menu** page provides links to guidelines and instructions as well as other information related to the particular grant program. A copy of the eGrants Application Guidelines—Part 1: General and Fiscal Guidelines, which is applicable to all eGrants, is also available in the Program Information pane.

To open the instructions, guidelines, or other supporting documentation for the grant, click on the name of the document in the **Program Information** pane.

Read all the application and program guidelines before starting the application. A good understanding of the rules and requirements of the grant and the eligible applicants will be crucial to the preparation of a grant application.

The instructions available from these links are the full instructions for the grant. You can also print instructions for a single schedule. The procedure for opening individual schedule instructions is different depending upon whether you are working with a grant in the new eGrants or one in legacy eGrants. See Comparing the New and Legacy eGrants.

Comparing the New and Legacy eGrants

Some grants have been converted to the new eGrants system. When you select a converted grant, the **Grant Menu** page looks like the one shown in New Interface. When you select a grant for a program that has not yet been converted, the **Grant Menu** page does not contain the list of schedules for the grant application. You must select the link to the application, and the **Schedule Index** page appears, like the one shown in Legacy Interface.

New Interface

Here is a sample **Grant Menu** page for the new eGrants interface. If you are working with a legacy application, the page looks the same except that the eGrants Application Table of Contents pane is replaced by the eGrant Application pane and does not show the list of schedules. Instead, the name of the grant application appears. See the chapter entitled Applying for a Grant.

Legacy Interface

If you are working with a grant that is still in the legacy eGrants interface, the **Grant Menu** page does not contain the list of schedules. Instead, only the grant application name appears. You must click on the name of the grant and then a page such as the following appears.

Applying for a Grant

Depending upon the grant, you may be using the new or legacy eGrants interface when you are working on a grant.

Reviewing Grant Materials

The **Program Information** pane on the **Grant Menu** page provides links to information and instructions related to the particular grant program. The application is for informational purposes only. If the grant requires electronic submission, this application cannot be filled out and submitted to TEA. A copy of the Application Guidelines—Part 1: General and Fiscal Guidelines, which is applicable to all eGrants, is also available in the **Program Information** pane.

Click on the link to open a document or view a web site. Read all the application and program guidelines before starting the application. A good understanding of the rules and requirements of the grant and the eligible applicants will be crucial to the preparation of a grant application.

Remember that the instructions provided in eGrants are often general to many grants. Specific instructions for a step may be listed in Application Guidelines—Part 2: Program Guidelines and Use of Funds.

Selecting a Grant Program

Follow these steps to select a grant program.

1. If you have not already done so, open the **Grantee Profile.**

2. Select the grant program from the **Available Grant Programs in eGrants** list. This list shows all the grant programs for which your organization may be eligible.

> **Note:** Before applying for a grant, always check the program guidelines for more details on eligibility and other information.

3. Click **Initiate.** The **Grant Menu** page opens:

Once you have begun to fill out an application, you can also select it from the proper folder in the **Grant Application Summary:**

The folders are as follows:

- **Draft Applications:** The application is partially completed but has not yet been submitted.

- **Submitted Applications:** The application is complete and has been submitted to TEA. TEA staff members are in the process of reviewing the application.

- **Application Requiring Negotiation:** TEA has placed the application in a negotiation status and asked for changes. The application remains in this folder until you have resubmitted it.

- **Awarded Applications:** A grant was awarded and a Notice of Grant Award (NOGA) issued.

- **Archived Applications:** The grant period is past, and the grant is archived for future reference. The application remains in this folder for five years.

    If the grant program you selected is competitive or allows SSAs, TEA requires you to complete an ADC or GWA form before you have access to the grant application. In this case, you will not see the list of application schedules in the **eGrant Application** table of contents pane. Instead, you will only see a link for the ADC or GWA form under **eGrants Designation**

Forms. Before you have access to the application, you must fill out the ADC form and submit it to TEA. The application schedules will appear in the list some time after you submit the ADC form.

> **Note:** The response to this application is binding for the entire project period. You are advised to complete the process of obtaining local board approval, as appropriate, before submitting this form.

Working with eGrants Schedules

Opening a Schedule

To work on an application, you must first have searched for and selected a grant program from the **Grantee Profile.**

The eGrants application consists of a set of schedules, or forms, that you must complete. These schedules are listed in the **eGrant Application Table of Contents** pane, divided by schedule type.

To begin working on the application, click on the name of Schedule **GS2100—Applicant Information** in the **eGrant Application Table of Contents** pane to open it. Until you complete Schedule **GS2100,** the other schedules are not available.

When you open a schedule, it locks to your use, so that no one can edit your copy of the form while you are using it. Once you close a schedule, the lock releases so that someone else in your organization can edit the same schedule.

Once the schedule opens, you can begin completing it. Click on the **Instructions** button at the top of the schedule page to see instructions for that schedule.

> **Note:** You must enter and save some information in Schedule **GS2100** to start the application process. By saving this basic information, you will be creating a working file for your application for this grant, which you are under no obligation to complete or submit. You may log on to eGrants as many times as you wish before the due date to work on your application. Once you submit an application, it is no longer available unless it requires revision by TEA.

To submit an application, you *must complete all required schedules.* Required schedules are marked with an asterisk in the **Required** column.

Viewing Schedule Information

At the top of each application schedule is the schedule header showing information about the schedule. The header contains the following information:

- ■ **Schedule Status:** the status of the schedule, as follows:

  - • **Available or New:** The schedule has not been saved.

  - • **Incomplete:** The schedule has been saved but some required fields are not complete.

  - • **Complete:** The schedule has been saved, and all required fields have text.

  - • **Not Applicable:** You have marked this schedule as not applicable to your application. If a form is not applicable to your application, you must open the schedule and check Not Applicable.

- ■ **Type of program:** discretionary or formula

- ■ **Application ID:** the number assigned to the application

- ■ **Organization:** the name of your organization

- ■ **Campus/Site:** the name of your campus or site, if applicable to the type of grant

- ■ **Vendor ID:** your organization's vendor ID number

- ■ **County-District:** your organization's county/district number

- ■ **ESC Region:** the ESC region number for your organization

- ■ **School Year:** the school year for the grant program

Filling Out the Schedule

Click **Instructions** to read the instructions for filling out the schedule. Some sections of schedules have a **Help** button for detailed information related to a particular field, and all of them have mouseovers that show explanatory text when your mouse hovers over a field.

The following are some tips for filling out the schedule form:

- Use the Tab key on your keyboard to move from field to field.

- Do not use all caps. Type all text in upper- and lowercase.

- Make sure all text fits in the allotted space. Many fields have a text count feature at the top of the pane. This feature tells you how many letters (including spaces) are permitted and how many you have left. Do not type more characters than are allowed.

  The program will not save text that goes beyond the text count.

- Save each page as you enter data. Saving will prevent loss of data if you select the **Cancel** button or if system availability is temporarily interrupted.

> **Note:** The eGrants system will log you off if there is no activity for 20 minutes. As with most software programs, remember to save your documents at regular intervals as you work on them. You will need to log back onto the system if you are logged off.

- Tab out of a field to see any calculations on budget forms.

- Areas shaded in a light gray are fields populated automatically by the eGrants system, when applicable. Some of these fields are calculation totals-data pulled from sources outside the application-and some of these fields are populated with information entered elsewhere in the application.

- Areas shaded in a dark gray are fields that are not required to be answered for that particular grant.

Printing a Schedule

To print an individual schedule, click **Printable Version.** Doing so opens the page in a browser window that uses the standard controls found in Portable Document Format (PDF) documents. Use the PDF print capabilities to print the schedule.

1. Click on the printer icon.

2. Choose the printer.

3. Choose the pages you would like to print.

4. Type the number of copies you would like.

5. Define how you would like to scale the page to fit on the selected paper.

6. Make any other adjustments as needed.

7. Click **Print.**

Moving Around within a Schedule

Once you have opened an application or report, the following tips will help you work in eGrants:

- To select another schedule, click on the **Select Schedule** menu at the top of the page and select another schedule.

- Do not use the Back button on the browser. Use the navigation buttons provided on the form. Using the browser Back button can cause problems in processing the eGrants form.

- Do not use the X button on the browser to exit a form or to exit **Grantee Profile.** Instead, return to the **Grant Menu** page by clicking on **Application Menu** and clicking **Exit** on the left margin.

- eGrants security disables the system connection to TEA if no activity is detected for 20 minutes. This disconnection may not be evident until you attempt to save data. Any data entered after an automatic disconnection is lost. Save data often, and always save data when an interruption to your work may keep you from entering data for more than 20 minutes. Unless you want to discard data, always save it before returning to the table of contents.

Saving the Schedule

You should save each schedule frequently to avoid losing data. To save the schedule, click **Save** at the top or bottom of the page.

Returning to the Grant Menu Page

To return to the **Grant Menu** page from any schedule, click **Table of Contents** at the top of the page.

Managing Your eGrants Application

Other activities you may want to perform regarding your application take place on the **Grant Menu** page. To return to the **Grant Menu** page from any schedule, click **Application Menu.**

Viewing Official TEA Time

It is important to pay attention to TEA time, because TEA will not accept applications or reports after 5:00 p.m. TEA time on the day they are due. Use this time to ensure that any reports and applications are submitted by the official time. The due date for your application appears in the top of the **Grant Application** pane:

To view official TEA time, click on the **TEA Time** button at the bottom of the page:

A window opens showing the official date and time:
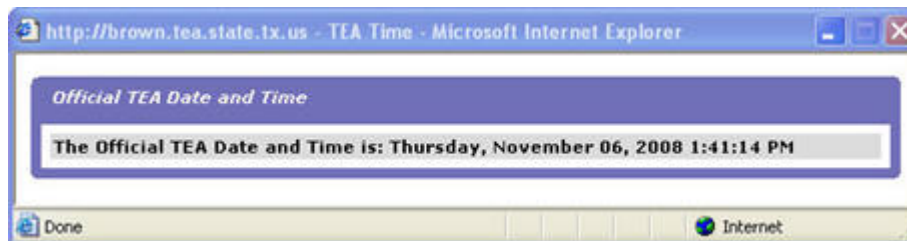
Viewing Errors in Your Application

The **Grantee Profile** provides an easy way to view application errors. Click the **View Errors** button at the bottom of the page. A window opens listing the errors and providing the ability to print the page.
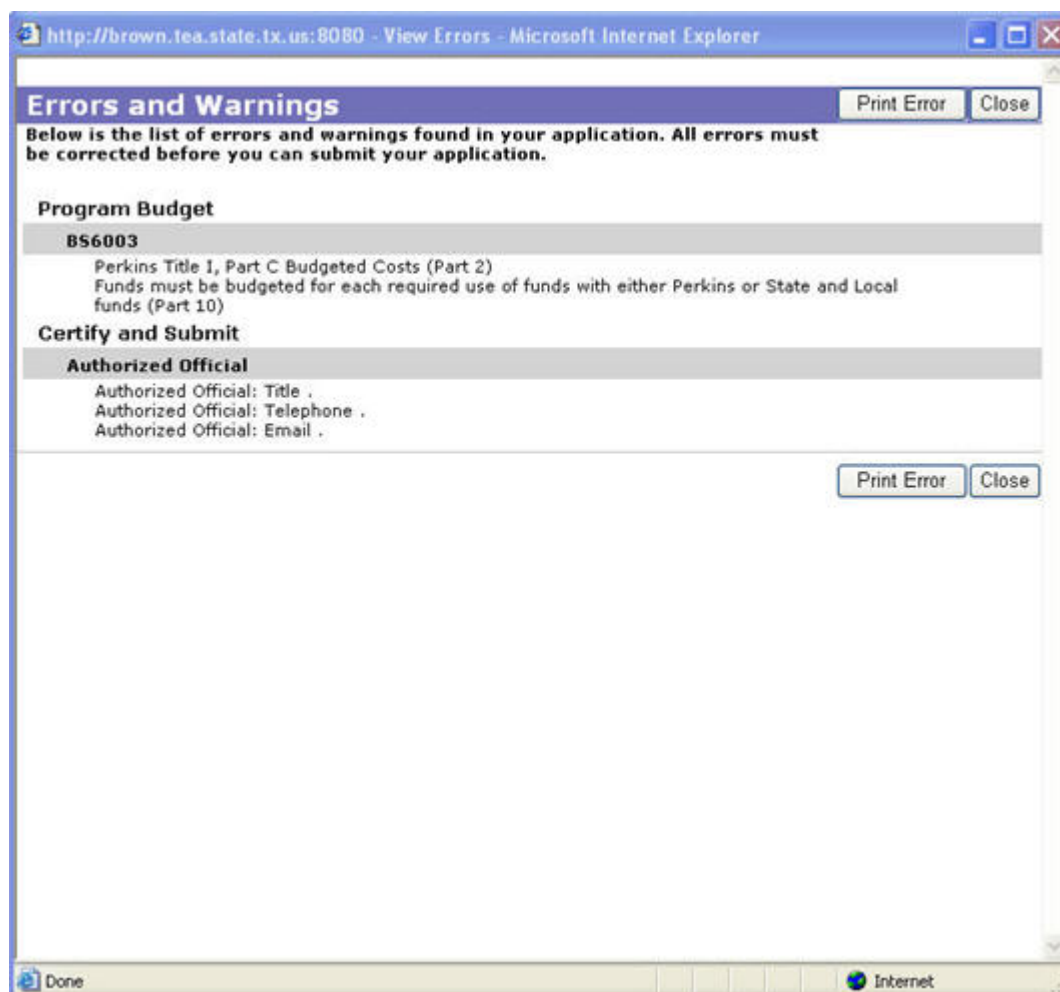
Attaching Files

The grant program to which you are applying may require specific forms or other information to be attached to your application. Use this procedure to attach the files.

> **Note:** The size of each attachment cannot exceed 10MB. If you have a larger file, use a different scanning setting or zip the file to make it take up less space.

Naming Attachments

Name the files you are going to attach with no spaces (for example, 501C3letter.doc or 5013C_letter.doc). Use a meaningful name that identifies the specific document.

Make sure that each attachment has a file extension (.pdf, .doc, .rtf, .xls, .bmp, .zip, .txt).

Scanning Documents

If a document must be scanned to create an electronic copy, use the following hints to ensure that the document size is as small as possible:

- Use an OCR or DPI setting of 200 DPI.
- Try to avoid creating .jpg files. If possible, create PDF documents with the scanner.

Zipping Files

If your files are too large, add them to a zip file to save space. To download a free version of WinZip and find instructions on creating zip files, go to http://www.winzip.com/downwz.htm.

Adding Attachments

1. Click **Attach File.** The following attachment screen appears:

The required attachments are listed and described at the top of the dialog box. If you are attaching a document that is not listed, check **Other.**

2. In the **Add Attachments** pane, select the title of the attachment from the list, or if you selected **Other** above, type in the title.

3. Click the **Browse** button. A standard Windows browser appears. Find the file.

4. Click **Attach.**

5. Click **Refresh** to see the name of the document in the **Documents Submitted in this Version** pane.

6. Repeat this process to attach the rest of your documents.

Viewing and Printing the Application

You can view and print the most recently saved version of the application, as follows:

1. Click **View and print most recent saved version.** The application opens as a PDF.

2. Print the application by selecting **File > Print** or by selecting the Print icon.

3. Print as you normally would.

Submitting the Application

Once you have completed the application and corrected all the errors, save it. Keep in mind the following when submitting an eGrants application:

- An application cannot be submitted if it contains errors.
- An application can only be submitted once.
- A submitted application cannot be changed without filing an amendment.
- Only the organization's authorized official can submit a grant application online via eGrants.

If you are the author of the grant but not the authorized official, do the following:

1. Exit the application by clicking on **Exit.**

2. Contact your authorized official (Grantee Official) to advise that the application is complete and ready for submission. Be sure to let the Grantee Official know which applications are ready to review and approve.

> **Note:** The login ID of the person pressing the **Certify and Submit** button must be that of the Organization Authorized Official that was submitted using the ADC form. This person must be the authorized official of the organization with authority to bind the organization in an agreement.

The authorized official then must do the following:

1. Log on to eGrants.

2. Search for and open the application.

3. Verify that the content of the application is correct.

4. Click the **Certify and Submit** button. The successful submittal will be confirmed.

5. Exit the application by clicking on **Exit.**

Amending an Application

You cannot make changes to a submitted application without filing an amendment. Before you do so, however, make sure that an amendment is required or allowed for the change you want to make. To do so, consult the Schedule Instructions to see the conditions under which you may request an amendment. If you have any question about whether you should request an amendment, call or email the program contact.

Exiting the Application

Any time the application is open, if you wish to exit the application do the following:

1. Save the information if you would like the system to retain it.

2. Return to the **Grantee Profile** main page or the **Grant Menu** page if you have a schedule open.

3. Click on **Exit.**

Managing the Application

This chapter covers the following application management activities:

- Amending an Application
- Revising an Application
- Accessing Progress or Compliance Reports
- Viewing Documents in the Document Library
- Exiting eGrants

Amending an Application

You cannot make changes to a submitted application without filing an amendment. Before you do so, however, make sure that an amendment is required or allowed for the change you want to make. To do so, consult the schedule instructions for Schedule **GS2900—Purpose of Amendment** to see the conditions under which you may request an amendment. If you have any question about whether you should request an amendment, call or email the program contact.

Revising an Application

The program area may request you to revise your application before it is accepted. In this case, your application will appear on the **Grantee Profile** page under **Application Requiring Negotiation** in the **Grant Application Summary.** Notes explaining the requested change will appear in form **GS2300—Negotiation Comments and Confirmation.**

Accessing Progress or Compliance Reports

If your grant requires a progress or compliance report, it appears some time before the deadline in the **Grant Progress/Compliance Reports** pane of the **Grant Menu** page. The **Grant Menu** page appears after you have selected a grant program from the **Grantee Profile** page and clicked **Initiate.**

The pane shows the following details:

- **Form Description:** the name of the report
- **Status:** the status of the report
- **Due Date:** the date the report is due
- **ID:** the identifying number for the report

To open the form, click on its name. Instructions for the form are available from the **Instructions** button. Some forms may also contain **Help** buttons for additional information.

When you are finished completing the report, make sure that the official authorized to submit it, does so. Save it and submit it by clicking the **Submit** button.

Viewing Documents in the Document Library

The Document Library contains any grant-related documents that have been submitted in eGrants, including grant applications, their attachments and related documents such as applicant designation forms or grant writer assignment forms; NOGAs and related documents; reports; and special data collections. It can take up to 24 hours for these documents to appear in the list.

1. Log in to eGrants.

2. Select **Grantee Profile** from the main menu.

3. Select the grant program.

4. Open the **Document Library** dialog box by clicking on the link. If no documents are available yet, the following pane appears:

If at least one document is available, the following pane appears. The check boxes at the top of the box vary depending upon which documents are available in the library.
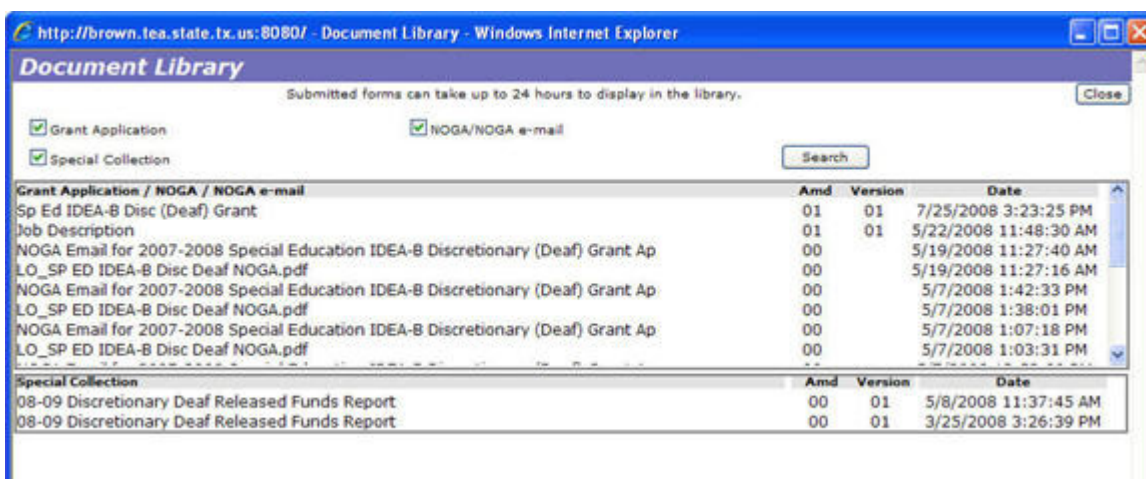
5. If there is a grant application available, **Grant Application** is checked and the grant applications appear when the list appears. If you would like to view another type of document, check at least one box from the possible document types.

6. Click **Search.**

The pane shows the following information about the documents:

- **List of selected documents:** header changes to show selections—title of documents
- **Amd:** the amendment version (00 means there has been no amendment.)
- **Version:** the version number of the document
- **Date:** the date the document was submitted

Exiting eGrants

To exit eGrants, do the following:

1. Save the information if you would like the system to retain it.

2. Return to the **Grant Menu, Grant Application,** or the **Grantee Profile** page if you are working in one of the schedules.

3. Click on **Exit** on the main menu.

Index