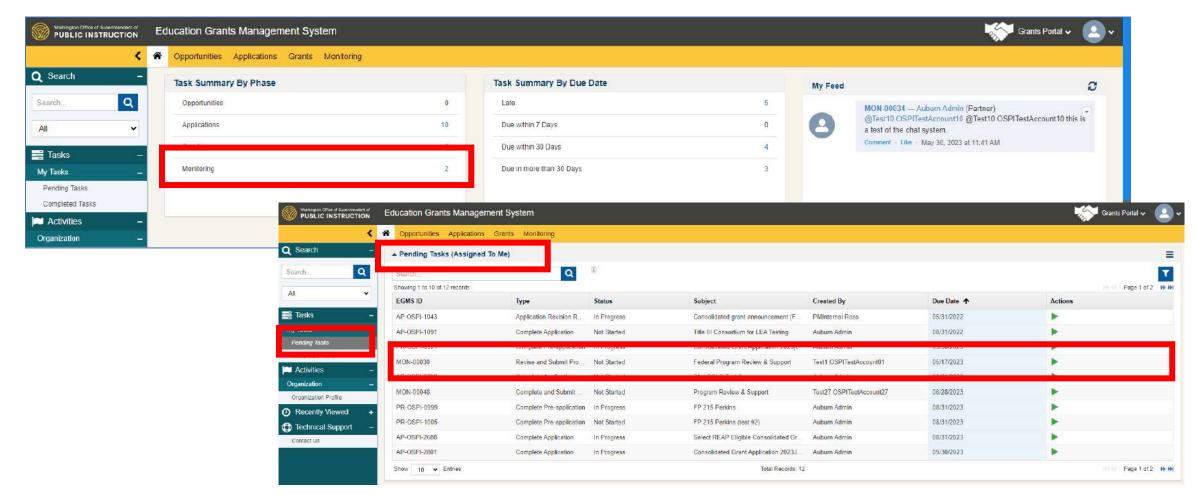
# EGMS: Program Reviews Organizations and LEAs

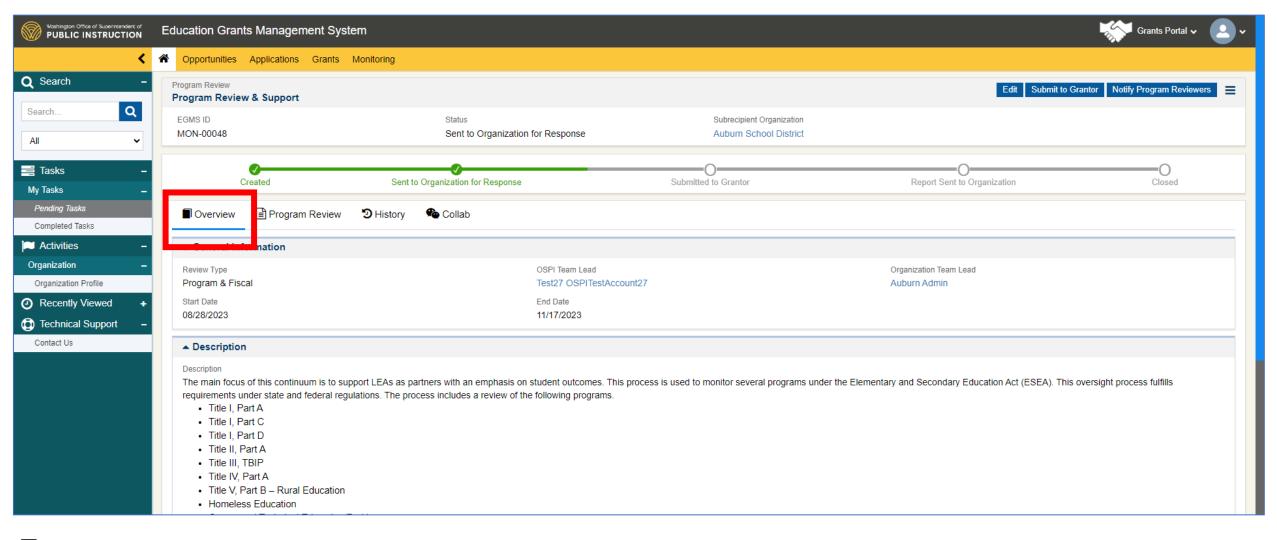
Part 1: Providing Initial Responses

#### Subrecipient access to Program Reviews



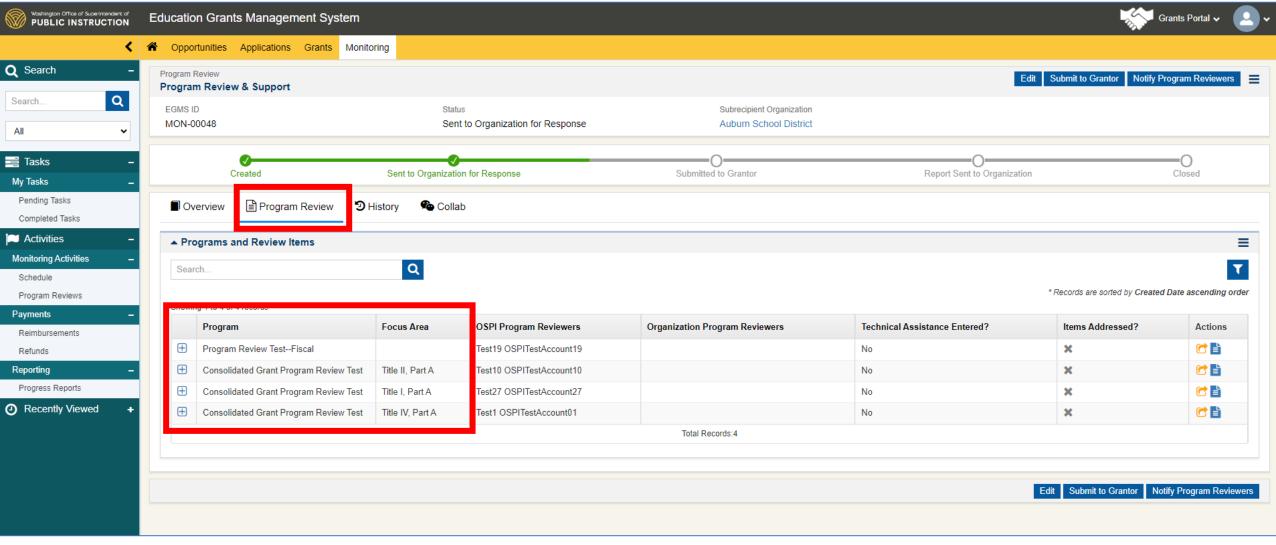
- ☐ The Subrecipient Organization can see an additional Monitoring task was assigned on the dashboard.
- ☐ In the Pending Tasks page, the Subrecipient can see the Monitoring Task on the "Assigned to Me" section.
- ☐ The Subrecipient can click on the green triangle (action button) to open the Review or access it through the Monitoring tab.

#### Overview Tab



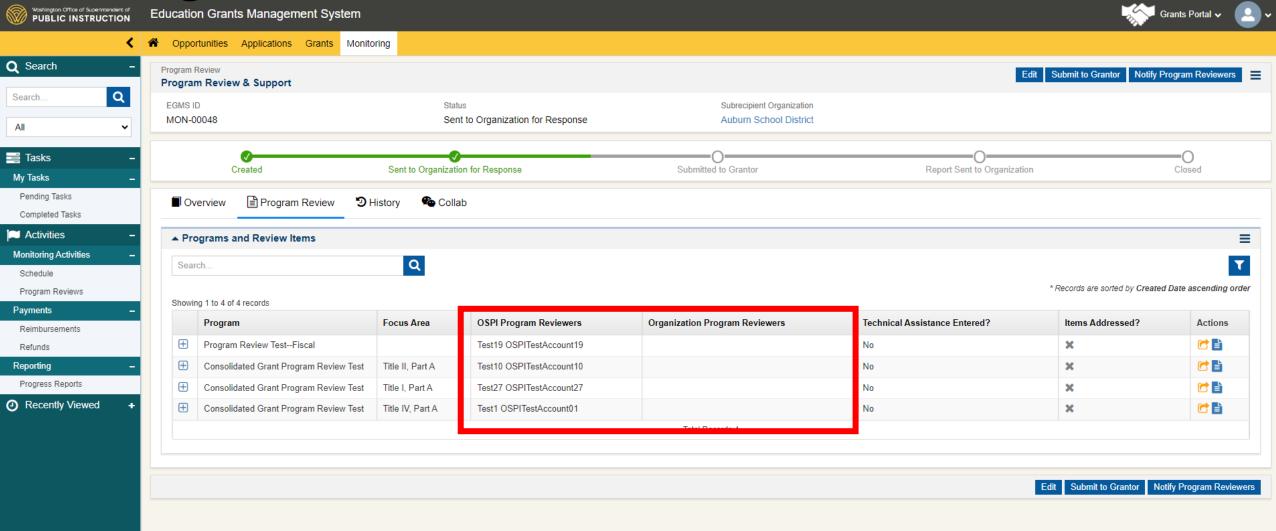
- ☐ When the Program Review is opened the first time, the Overview tab is displayed.
- ☐ This tab has general information about your Review.
- ☐ No actions needed on this tab.

### Program Review Tab



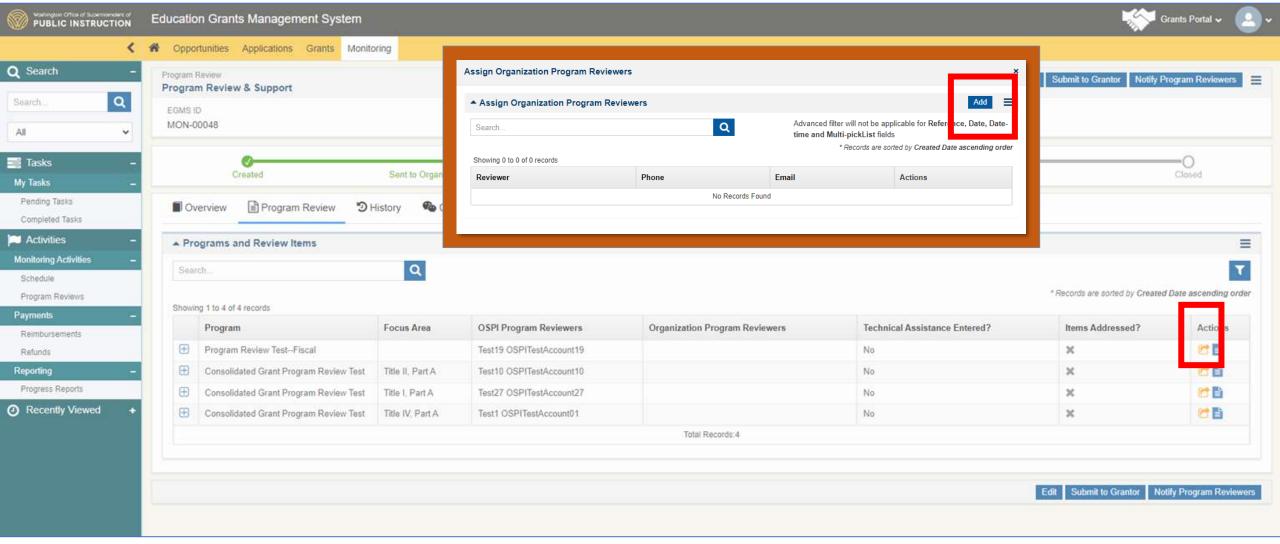
- ☐ This tab includes all the Program Checklists and is where you will respond to the checklist items.
- ☐ Each row of the table pertains to a single Program. **Program** and **Focus Area** columns contain the name of the Program.
- ☐ Use the ☐ to expand each row to see the checklist items.

#### Program Review Tab



- ☐ The **OSPI Program Reviewers** column contains the OSPI staff who will Review that Program.
- ☐ The **Organization Program Reviewers** are those the Organization Team Lead assigns to each Program. *Only the Team Lead can assign staff to the Programs*.

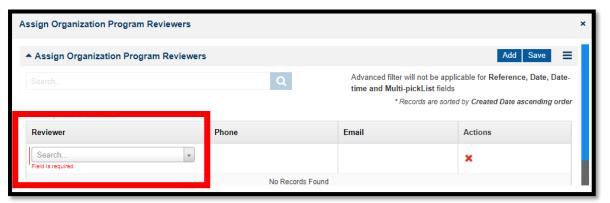
#### Assign Organization Program Reviewers



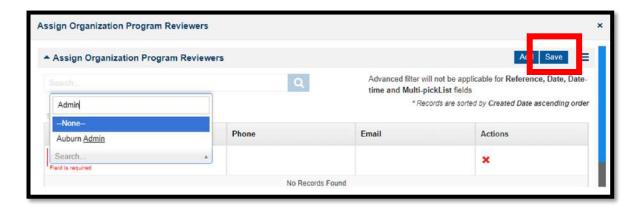
- ☐ Click on C to assign a user to that program. Only the Team Lead and this user can edit this Program Checklist.
- ☐ In the pop-up window click Add

#### Assign Organization Program Reviewers

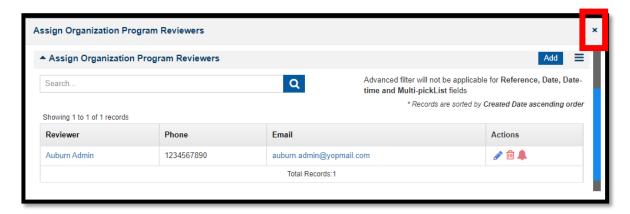
☐ Begin typing in the **Search field** 



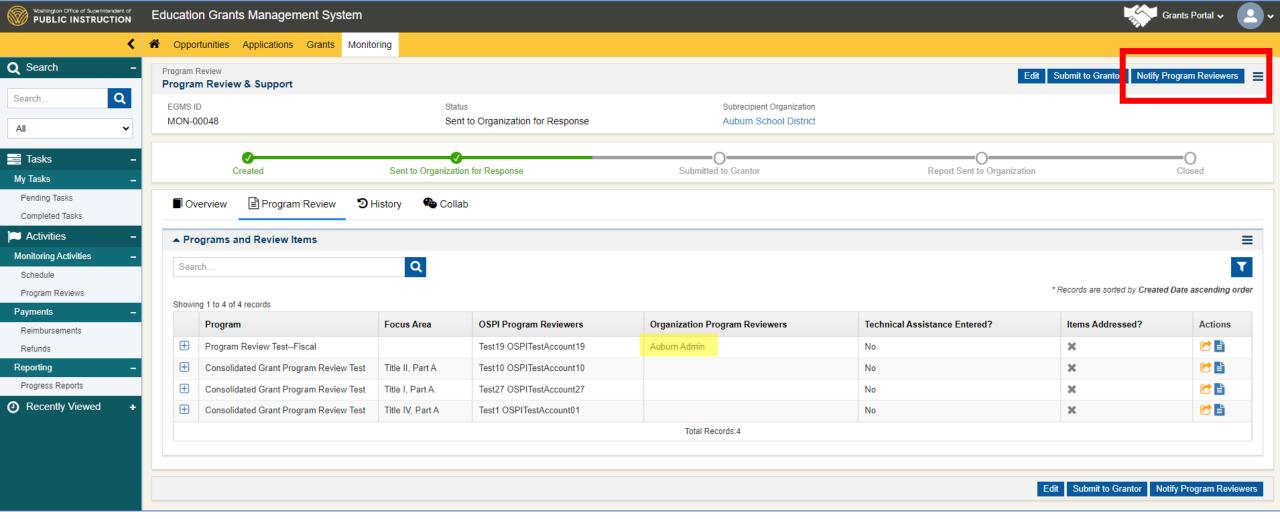
☐ Click on the name of the staff member to assign. Then click **Save.** 



☐ Add another staff member to that same Program by completing the steps above or click on the **x** to close the window.

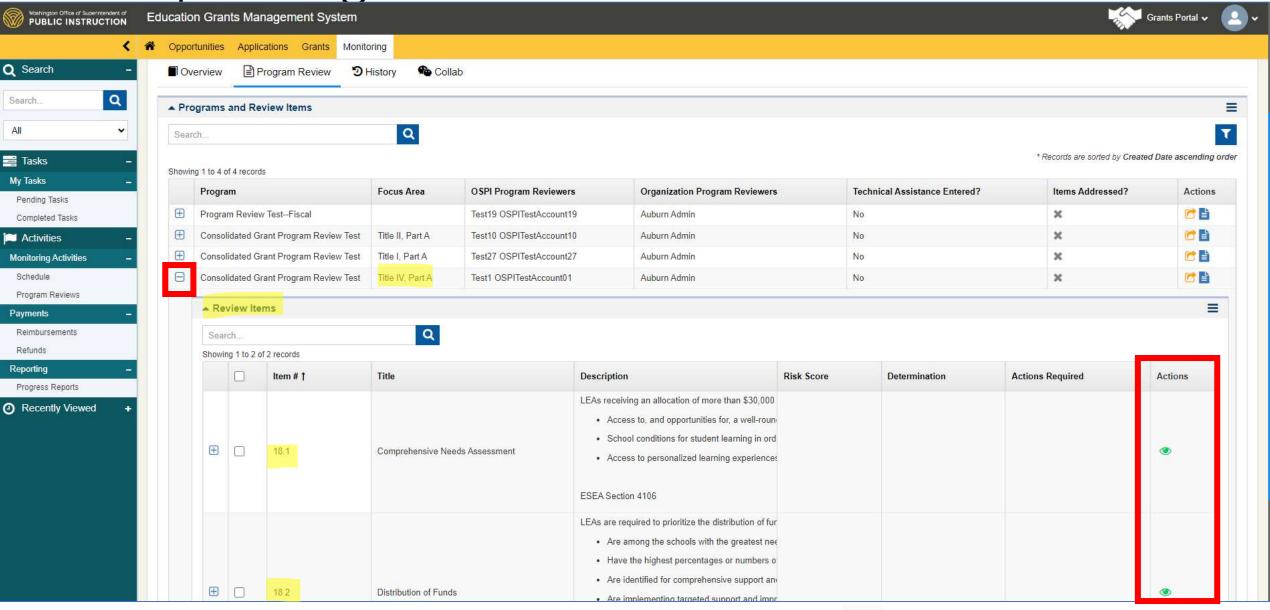


#### Assign Organization Program Reviewers



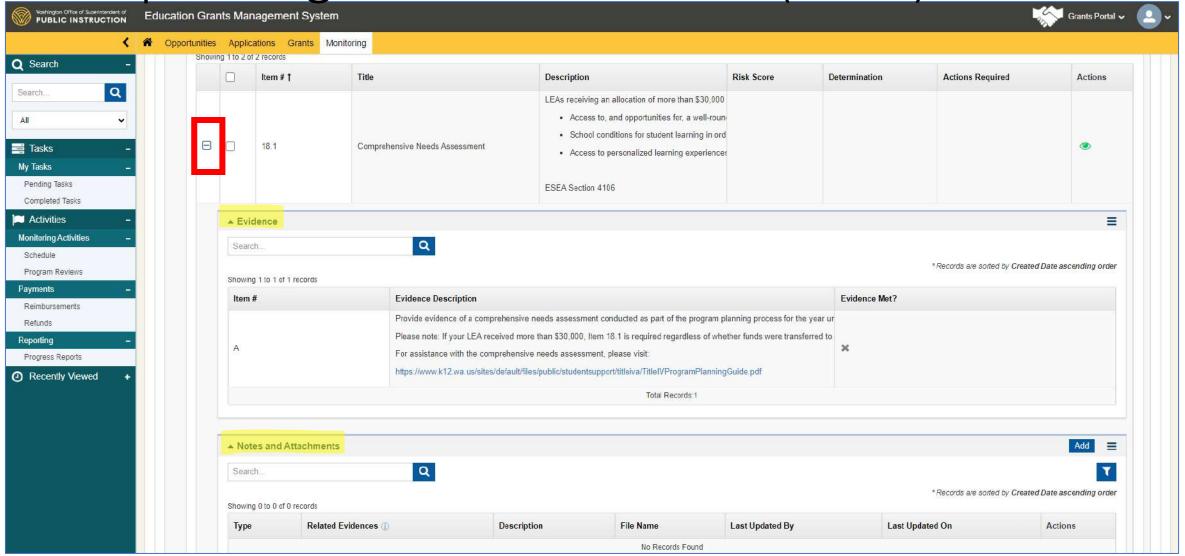
- ☐ After the assignment is made for the first row, use the same process until all rows of the table have assignments.
- ☐ Once all rows have assignments, click on **Notify Program Reviewers** to send an automatic email to each Organization Reviewer.

#### Responding to Checklist Items



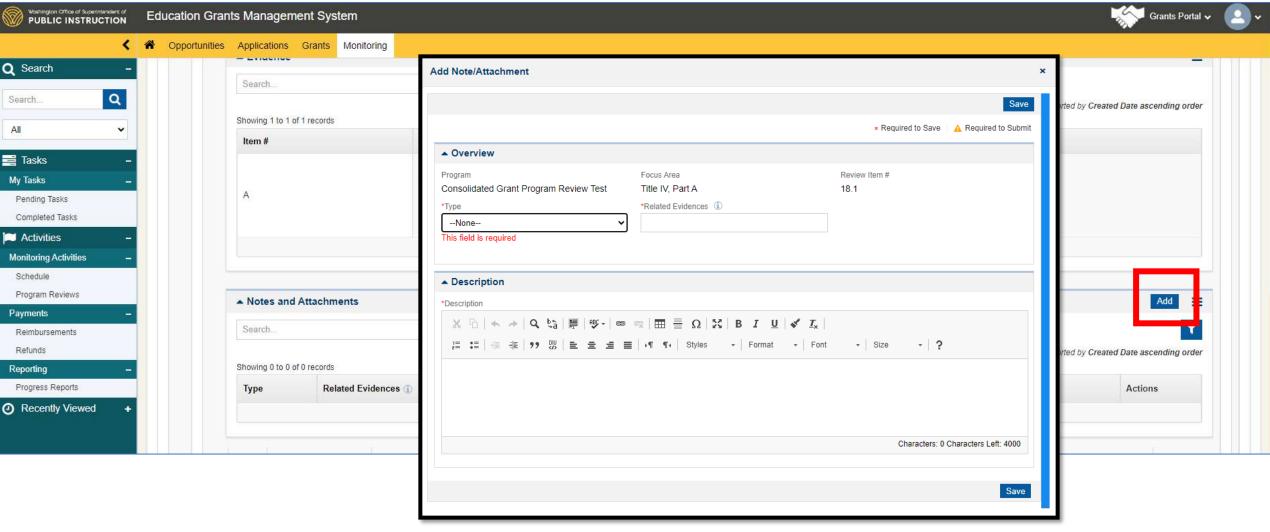
☐ Use the 🛨 to expand each row to see the checklist (or Review) items. Click on the 🥥 to read the **Description** if needed.

Responding to Checklist Items (cont.)



- ☐ Use the ☐ to expand the Review Items and see the **Evidence** sub-items. Hover over the **Evidence Description** to read more.
- ☐ Use the **Notes and Attachments** section to upload documents, descriptions, and notes.

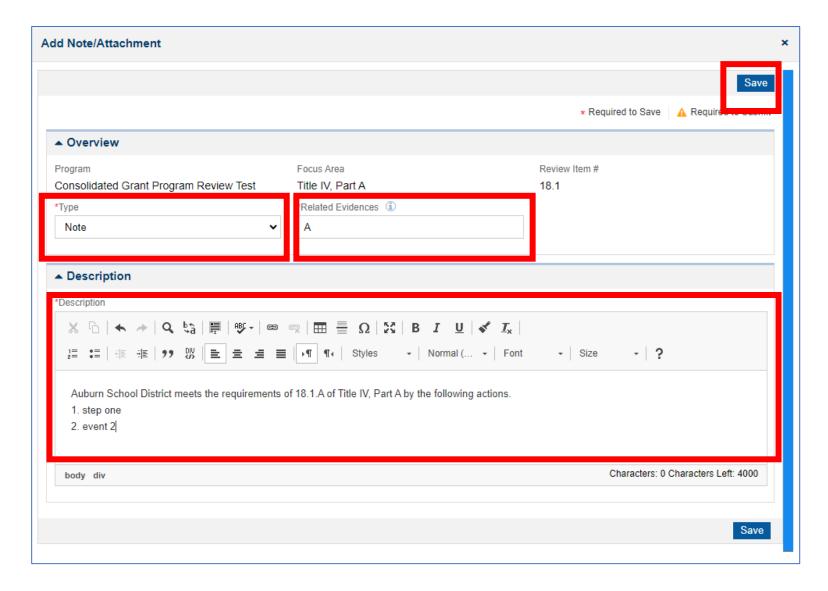
## Responding to Checklist Items (cont.)



- ☐ Click on **Add** to add a response to the Checklist Item with a Note or an Attachement.
- ☐ Window will pop-up with the fields to complete.

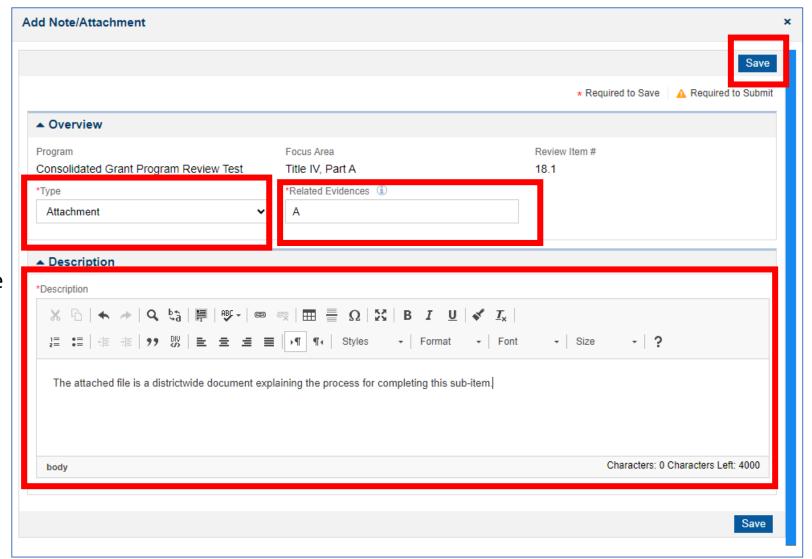
#### Uploading a Note

- ☐ Click on the **Type** field to select **Note**
- ☐ Enter the *letter* of the sub-item you are responding to in the **Related Evidence** field.
- Enter the note or description to address the sub-item in the **Description** field. You can edit the text, add links, etc. as needed to completely address the sub-item.
- ☐ Click **Save** when complete.

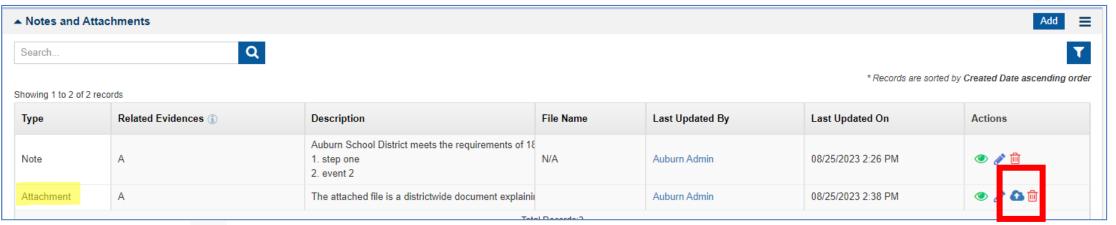


# Uploading an Attachment

- ☐ Click on the **Type** field to select
  Attachment
- ☐ Enter the *letter* of the sub-item you are responding to in the **Related Evidence** field.
- Enter a description of the file to be attached in the **Description** field. You can edit the text, add links, etc. as needed to completely address the subitem.
- ☐ Click **Save** when complete.



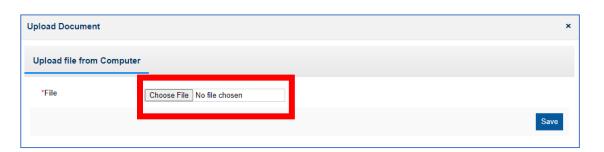
#### Uploading an Attachment (cont.)



☐ Next, click on the upload icon to select the file to upload.

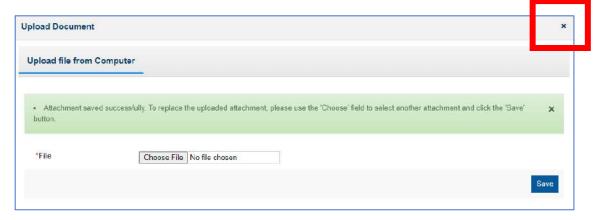
☐ Choose File to upload

☐ Then click **Save.** 

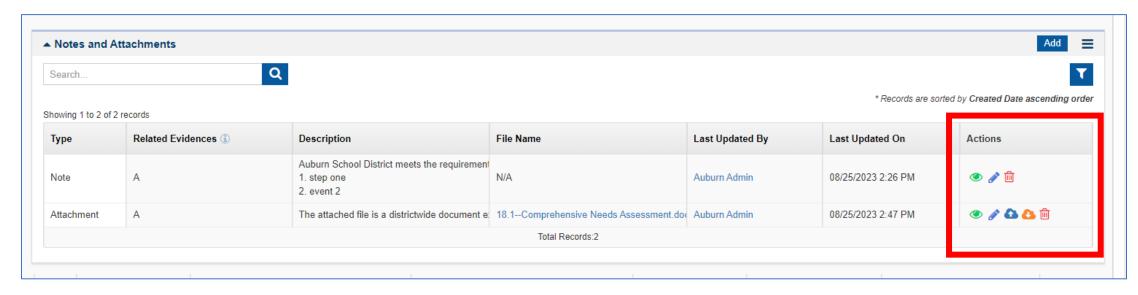


☐ A green banner will indicate the file was uploaded successfully.

☐ Click the **X** to close the window.

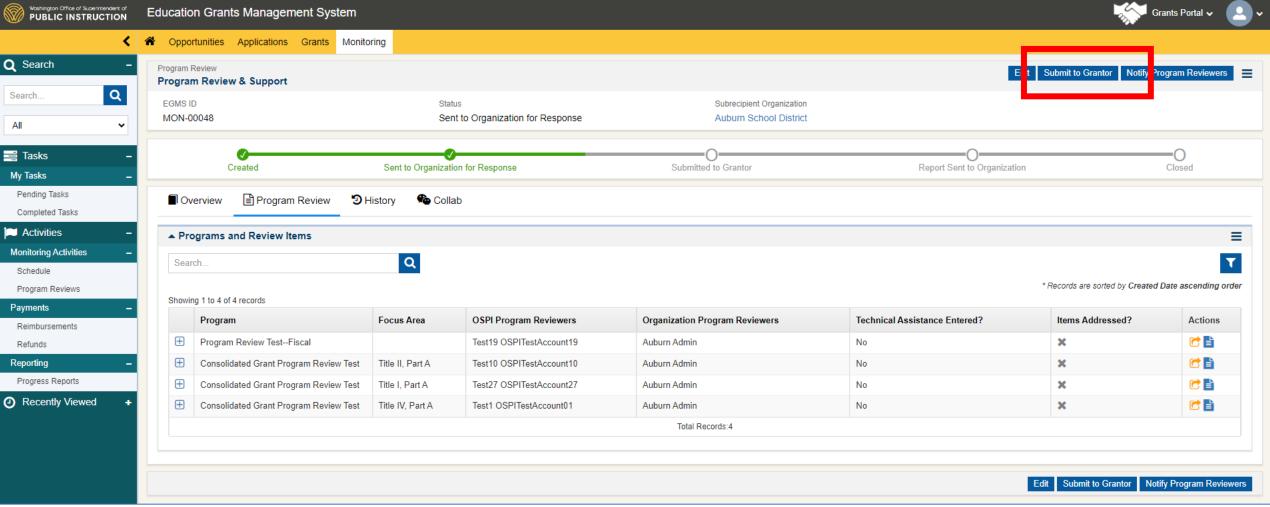


#### Notes and Attachments (Action Icons)



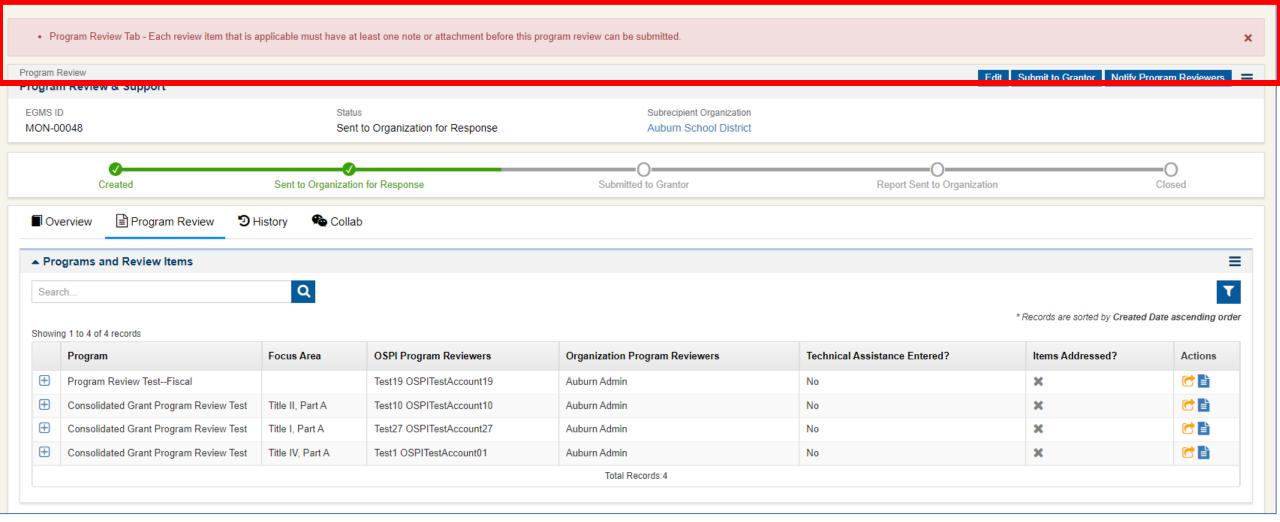
- **(**
- --The View icon opens a pop-up window with details of that row of the table.
- --The **Edit icon** allows you to edit the details of that row.
- 4
- --The **Upload icon** opens a pop-up window to select and upload a file for that row. It can also be used to replace the file in that row.
- 8
- --The **Download icon** will download the file from that row of the table.
- 圃
- -- The **Delete icon** will delete that row of the table.

#### Submit to Grantor (OSPI)



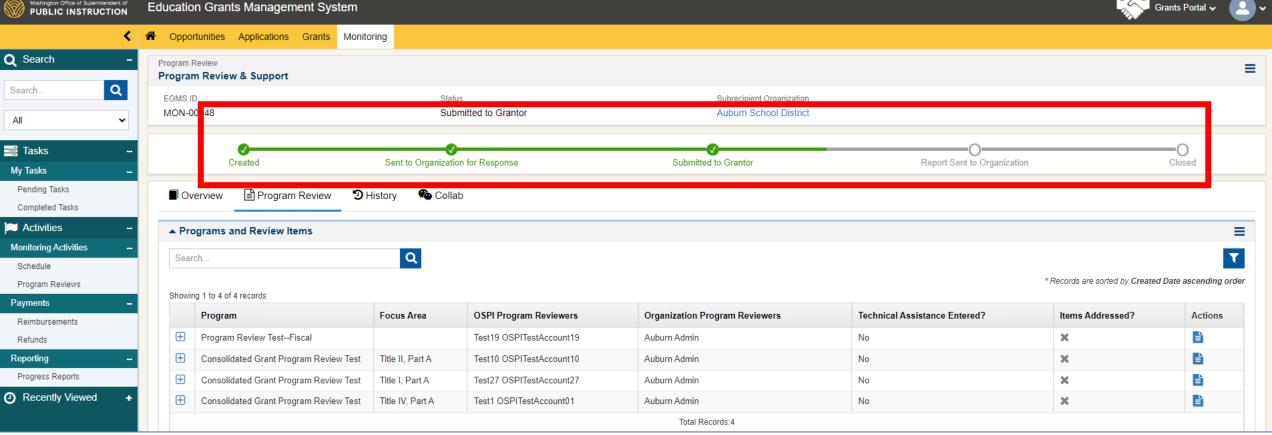
- Once all items in each checklist are responded to, the Organization Team Lead will click on **Submit to Grantor**.
- ☐ This will send a notification to the OSPI Team Lead that it is ready for OSPI staff to review.

#### Submit to Grantor (OSPI) (cont.)



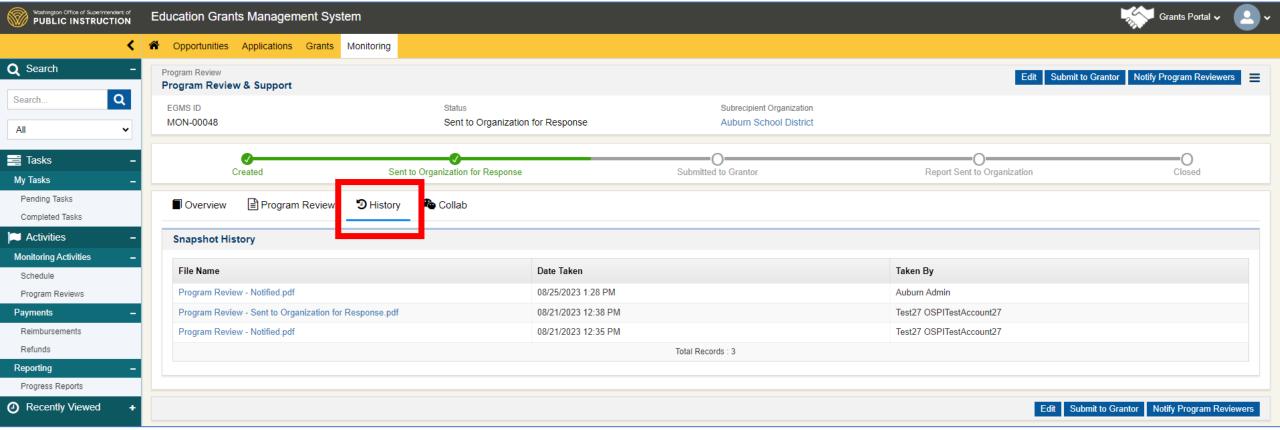
<sup>☐</sup> All items must be responded to. If any responses are missing, you will see this Pink Banner indicating at least one item is missing a response.

### Submit to Grantor (OSPI) (cont.)

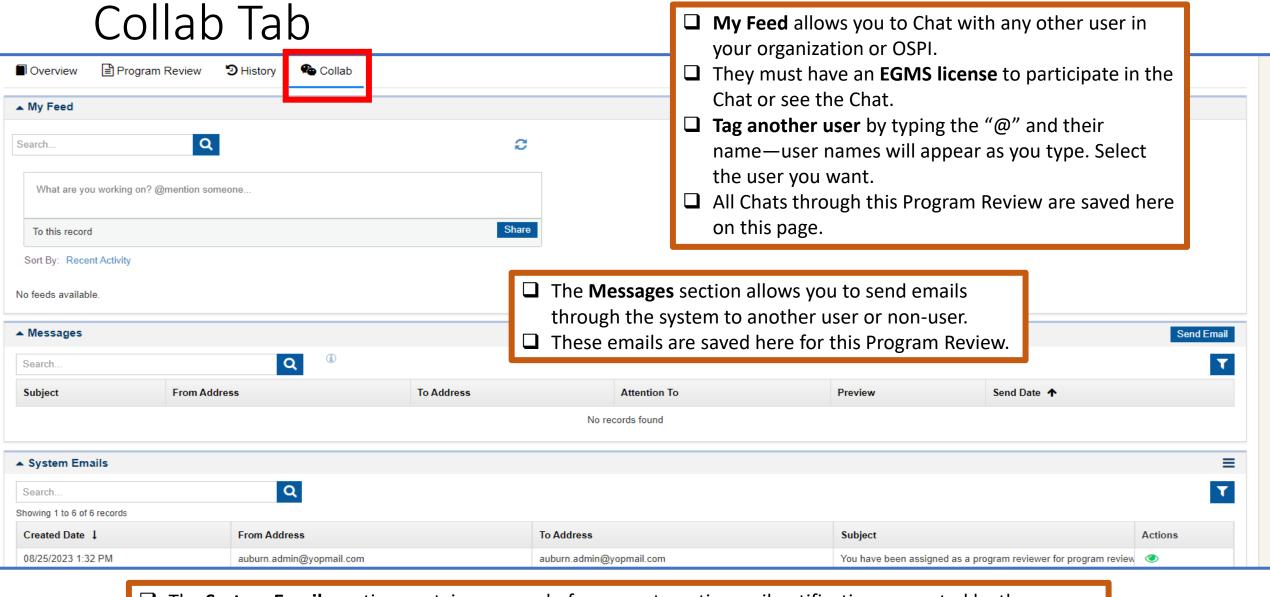


- ☐ If all items are responded to, the page will refresh, and the **status bar** will indicate the new status: **Submitted to Grantor**.
- ☐ Now that it is submitted to OSPI, the organization cannot respond to, or edit any of the responses.
- ☐ After OSPI's review, the OSPI Team Lead will send it back to the Organization for additional responses as needed.

#### History Tab



- ☐ The History tab includes a "snapshot" of the entire Review every time there is a change in the status.
- ☐ These snapshots are saved here as pdf documents with dates and the name of the person (Team Lead) who made the status change.



☐ The **System Emails** section contains a record of every automatic email notification generated by the Organization Team Lead or the OSPI Team Lead.

#### Additional Information

- The EGMS Administrator in your LEA or organization can assist with assigning EGMS licenses. If the org. or LEA reaches their maximum license amount, the Admin can reach out to <a href="mailto:Amy.Harris@k12.wa.us">Amy.Harris@k12.wa.us</a> and Cc <a href="mailto:EGMS.Support@k12.wa.us">EGMS.Support@k12.wa.us</a> to request additional licenses.
- Once you gain access to the Program Review, if you have questions or concerns with EGMS Program Review, reach out to the OSPI Team Lead assigned to your Review.
- Coming Soon
  - Part 2: Responding to the Preliminary Report in EGMS
  - Part 3: Closing the Program Review and Follow-up