Office of Superintendent of Public Instruction

iGrants User Training Manual

iGrants User Manual – OSPI

Updated: March 15, 2017

Contact Us

Email: iGrants@k12.wa.us Phone: (360) 725-4956

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Introduction

The Office of Superintendent of Public Instruction (OSPI) uses iGrants—an Internet-based system—to collect data from Washington State school districts for a variety of federal and state grant applications, competitive grants (RFPs), and end-of-year reports.

Training Manual Purpose

This training manual serves as an introduction to the iGrants system. Screenshots are provided to illustrate the various iGrants processes. OSPI program staff can use this training manual to learn how to operate the iGrants system and generate data exports and reports.

Adjusting the Browser Settings

To ensure that screens and reports display correctly, use **Internet Explorer** (IE) as your Web browser. If necessary, you may need to adjust the browser settings for IE by following these steps:

1. In the top right-hand corner of the browser window, click on **Tools.** In the drop-down list that displays, select **Internet Options.**
2. A window will display with Internet Options. On the **General** tab, under the heading **Browsing history,** click the **Settings** button.
3. Another window will display with Temporary Internet Files and History Settings. Under the heading **Temporary Internet Files,** select the radio button that says **Every time I visit the webpage.** Click OK.

4. This window will close and the Internet Options window will display. **Click OK again** to close this window.
5. Your browser settings are now adjusted and will **remain the default** each time you open the IE browser.

Exploring the iGrants Home Page—I Need To . . .

Get User Login Credentials

The procedures for gaining access to iGrants are as follows:

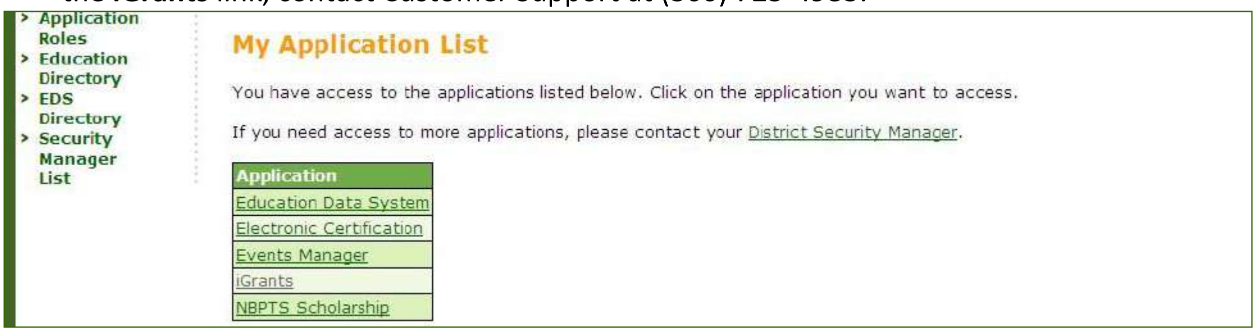
- **School Districts—**All users must contact their **district security manager**. A list of district security managers is located on the iGrants home page under the **Obtain User Login Credentials** link.
- **All other organizations (listed below)—**Contact OSPI Customer Support by calling **(800) 725-4311, Option #1** or by emailing **CustomerSupport@k12.wa.us**.
  - **Educational Service Districts**
  - **Non-Profit Organizations**
  - **Colleges and Universities**
  - **OSPI Program Staff** (After obtaining iGrants permissions from Customer Support, contact iGrants for access to specific form packages.)

Login to iGrants (All Users)

1. From the EDS Login screen, type your **Username** (your email address) and **Password** and click **Login**. The EDS home page opens. The URL is: https://eds.ospi.k12.wa.us/Login.aspx.

2. From the EDS home screen, click on the **View my applications** link.

3. From the My Applications screen, click on the link to **iGrants**.
   Note: Each user's My Application List will contain different links. If yours does not display the **iGrants** link, contact Customer Support at (360) 725-4983.



4. Clicking iGrants on the My Application page displays the iGrants home page screen. Click on **Login to iGrants** to enter the iGrants system. (If you have already logged into the EDS system, you are not required to login again, but you must click on the link to obtain access.)

Message Center

The Message Center link on the iGrants home page displays notification messages regarding form packages that are active in the iGrants system. Click on the appropriate link **(New, Current, or Archived)** to see the notification messages.

Date: 3/31/14
Message: 144 (2013-14 System)

The following has been added to the list of available iGrants form packages.

International Baccalaureate Registration Fee Reimbursement

Form Package: 686

Eligible Subgrantees: Private School, Public School

Purpose: To provide registration fee reimbursement to schools for eligible low-income students taking International Baqccalaureate exams during the 2013-14 school year.

Due Date: 4/25/14

Questions? Contact...

Barbara Dittrich, Program Supervisor
360-725-6097
barbara.dittrich@k12.wa.us

Topics

The iGrants home page displays links to the following **Topics:**

- Inventory of Form Packages
- Allocations
- Indirect Rates
- Carryover

Inventory of Form Packages

Clicking on the Inventory of Form Packages link displays a list of form package types.

- Use the **Select a Fiscal Year** drop-down to see form packages from prior years.
- Clicking the link for various **form package types** displays form package details and contact information.
- Clicking on the form package name will open up its **profile page.** This is not the form package itself but, rather, a page that lists various form package details.
- Click the **Print** icon to open the page in print view.
- Click the **Back** button to return to the Inventory of Form Packages main page.

Allocations

Clicking the Allocations link displays the **Allocation Amounts** page.

- Use the **Select a Fiscal Year** drop-down to view allocations for prior years.
- Clicking a **Funding Type** link on the Allocation Amounts page displays allocation amounts for various form packages. Click on the headers to sort the display.

Note: Only **uploaded allocations** will appear on this list. Form packages that have an open field in the budget calculator (where organizations enter the allocation themselves) will not appear on this list.

- Click the **Print** icon to open the page in print view.
- Click the **Back** button to return to the Allocations Amounts page.

Indirect Rates

Clicking the Indirect Rates link on the iGrants home page displays a page which describes the purpose of the indirect rate.

- Use the **Select a Fiscal Year** drop-down to select previous fiscal periods.
- Clicking the **Go** button on the **Indirect Rates** page displays the indirect rate types and amounts posted for districts in the selected fiscal year.
- Click the **Print** icon to open the page in print view.
- Click the **Back** button to return to the iGrants home page.

Carryover

Clicking the Carryover link on iGrants home page displays the **Carryover Amounts** page.

- **Select a Fiscal Year** from the drop-down.
- **Select a Funding Type** by clicking on the **Federal Grants**, **State Grants**, or **Other Grants** link.
- Clicking the funding type link on the carryover amounts page displays the appropriate **carryover amounts** for all organizations by form package for the selected fiscal year.
- Click the **Print** icon to print the page.
- Click the **Back** button to return to the Carryover Amounts page.

Resources

The Resources section of the iGrants home page displays links to the following:

- Assurances
- General Resource Information

Assurances

Clicking the Assurances link displays a page which describes the purpose of assurances and gives a list of form package assurances.

- Use the drop-down list to view previous fiscal periods.
- Click any of the program links to display the assurances for that program.
- Click the **Print** icon to open the page in print view.
- Click the **Back** button to return to the iGrants home page.

General Resource Information

The General Resource Information link displays informational links about the following:

- ESEA
- Transferability and REAP Flexibility Guidance
- Comparability

- Dollar Flow (Federal)
- Dollar Flow (State)
- Faith Based
- SAS Timeline

Customer Service

- Clicking the **Contact Us with Technical Issues** link displays the following technical support contact information.

Please contact. . .	**When you need help with. . .**
DISTRICT SECURITY MANAGER The "**Obtain User Login Credentials**" link on the iGrants home page takes you to a page that includes a link which lists **district security managers**.	**District personnel only** • Setting up new accounts • iGrants access/login issues • Changing EDS role assignments • Technical assistance with computer issues
CUSTOMER SUPPORT (800) 725-4311, **option #1** or (360) 725-4983 customersupport@k12.wa.us	**All other organizations,** including ESDs, nonprofits, colleges/universities, and OSPI staff • Resolving login issues • Creating new EDS accounts • Changing EDS role assignments • Accessing other EDS applications
OSPI PROGRAM CONTACTS See form package Profile Page for individual program contact information.	**Program-related questions regarding:** • Application content • Timelines/deadlines • Budgets • Guidance on appropriate use of funds
OSPI iGRANTS STAFF Jan Burt/Kritika Galvez (360) 725-4956 iGrants@k12.wa.us	**Technical issues, e.g.,** • Data isn't saving • A calculation isn't working correctly • Trouble submitting a form package • A form package is not visible on list

OSPI GRANTS MANAGEMENT/CLAIMS	All claims related questions
Holly Hill (360) 725-6281 holly.hill@k12.wa.us Michelle Sartain (360) 725-6282 michelle.sartain@k12.wa.us	Note: Even though the budget is created in iGrants, claims is a separate EDS system managed by grants management staff, not iGrants.

Form Package Processing

Designing/Revising a Form Package

Designing a New Form Package

If you are designing a new form package, you will need to provide iGrants the following documents:

- Profile page
- Instructions
- Form package pages

Follow the instructions for each document as described in the Revising a Previous Form Package section immediately following, ignoring references to copying from the previous fiscal period.

Revising a Previous Form Package

If you choose to move a form package from a previous year to the new fiscal period, the following documents must be submitted with updates. (If there will be no changes, the documents must still be submitted with a note to that effect.)

- Profile page (new survey required each year)
- Instructions
- Form package pages

Profile Page

Form package details, some of which appear on the profile page, are collected through the SurveyGizmo at http://www.surveygizmo.com/s3/908262/iGrants-Form-Package-Detail.

TIP: Have your previous profile page handy when you begin the Form Package Detail form to ensure you have the details necessary to complete the online questionnaire.

Instructions

Revisions necessary only if using custom instructions. If using generic instructions, just let iGrants know. The fiscal period will change automatically on generic instructions.

Form Package Pages

After logging into iGrants, use the following link to access your current form package, profile page, and instructions: https://eds.ospi.k12.wa.us/iGrants/WebPages/GrantWriter.aspx. Copy the online documents to a Word document where you can make revisions using the procedures described below.

TIP: Change the margins on the Word document to "narrow" to avoid cutting off the righthand margin.

Hand-written changes will not be accepted. All revised documents must be submitted electronically to **iGrants@k12.wa.us**. Send each form package in a separate email, noting the form package number in the subject line. We keep all correspondence for form packages in individual folders.

Highlight changes – We prefer that you **DO NOT USE TRACK CHANGES.** Make the changes as you would like them to appear in final form, and highlight those changes.

- If the change is simply adding a punctuation mark, highlight words before and after so we won't miss the change.
- If you are deleting an entire section, use strike-out, then highlight the new section.
- If you are making **significant changes** to your form package (e.g., you are reformatting entire pages or adding/deleting whole pages), feel free to create a new Word doc that reflects all format changes. Highlight the whole page if it's radically different from before.

Submit in final form with changes clearly indicated.

Pre-populated Data Fields

The survey will ask if you want iGrants to pre-populate form package data from the previous year.

- All data fields that were retained and used for the current year can be pre-populated. All newly created fields will display empty.
- iGrants can pre-populate: (1) all data fields, or (2) just the large narrative text fields, whichever best suits your needs.
- iGrants will automatically copy form package contacts from the previous year unless the form package is either competitive or new.

Note: iGrants cannot pre-populate some pages and not others.

Secure Director's Approval

Director's approval is necessary at two stages of the submission process: (1) pre-approving proposed changes before sending to iGrants, and (2), prior to launch. When final changes are approved, directors may email launch authorizations to **iGrants@k12.wa.us.**

Send Electronic Documents to iGrants

Email all revised documents to iGrants@k12.wa.us. Be sure to reference the form package number in the subject line. Send only one form package per email as we keep all documentation for each form package in its own folder.

Any documents you want to be linked to from within the form package or on the profile page must also be emailed to iGrants@k12.wa.us. You will have ample opportunity to test all links and review the form package prior to the launch.

Allocations

If your form package has a budget with uploaded allocations, please send an Excel document containing the following to iGrants prior to launch:

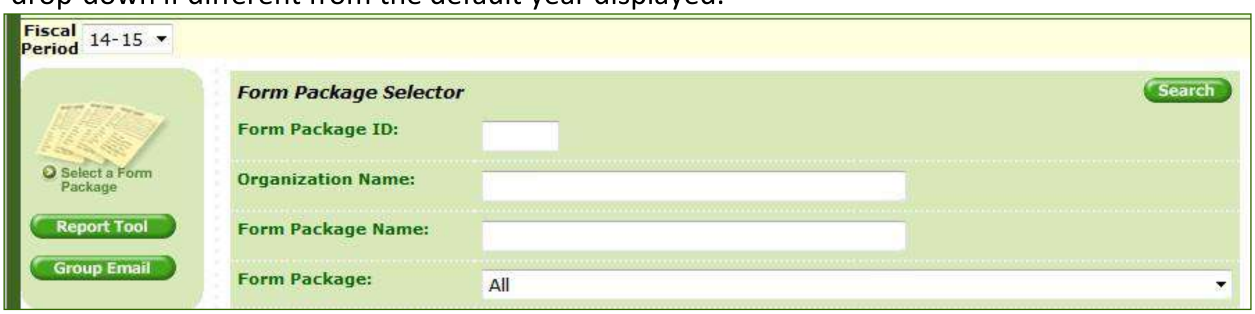
Form Pkg #	Organization Code	Organization Name	Allocation Amt.	Budget Category (if applicable)
3-digits	5-digits if district 4-digits if building Letters if non-profit			

Reviewing a Form Package

Finding a Form Package

The **Form Package Selector** page displays when you log into the iGrants system. To locate a specific form package, enter the **3-digit form package ID** then click **Search.**

Note: Before entering the form package ID, select the appropriate fiscal period by using the drop-down if different from the default year displayed.



Processing Steps

1. Clicking the form package name (hyperlink) with a status of **Requested OSPI Approval** displays the form package **Begin Review** page.

   Notes:

   - You must click the **Begin Review** button before processing icons will be available on the form package pages.
   - Sending the Begin Review email is **optional.** Click the email box *before* clicking the Begin Review button if you want to send a notification email to the applicant.

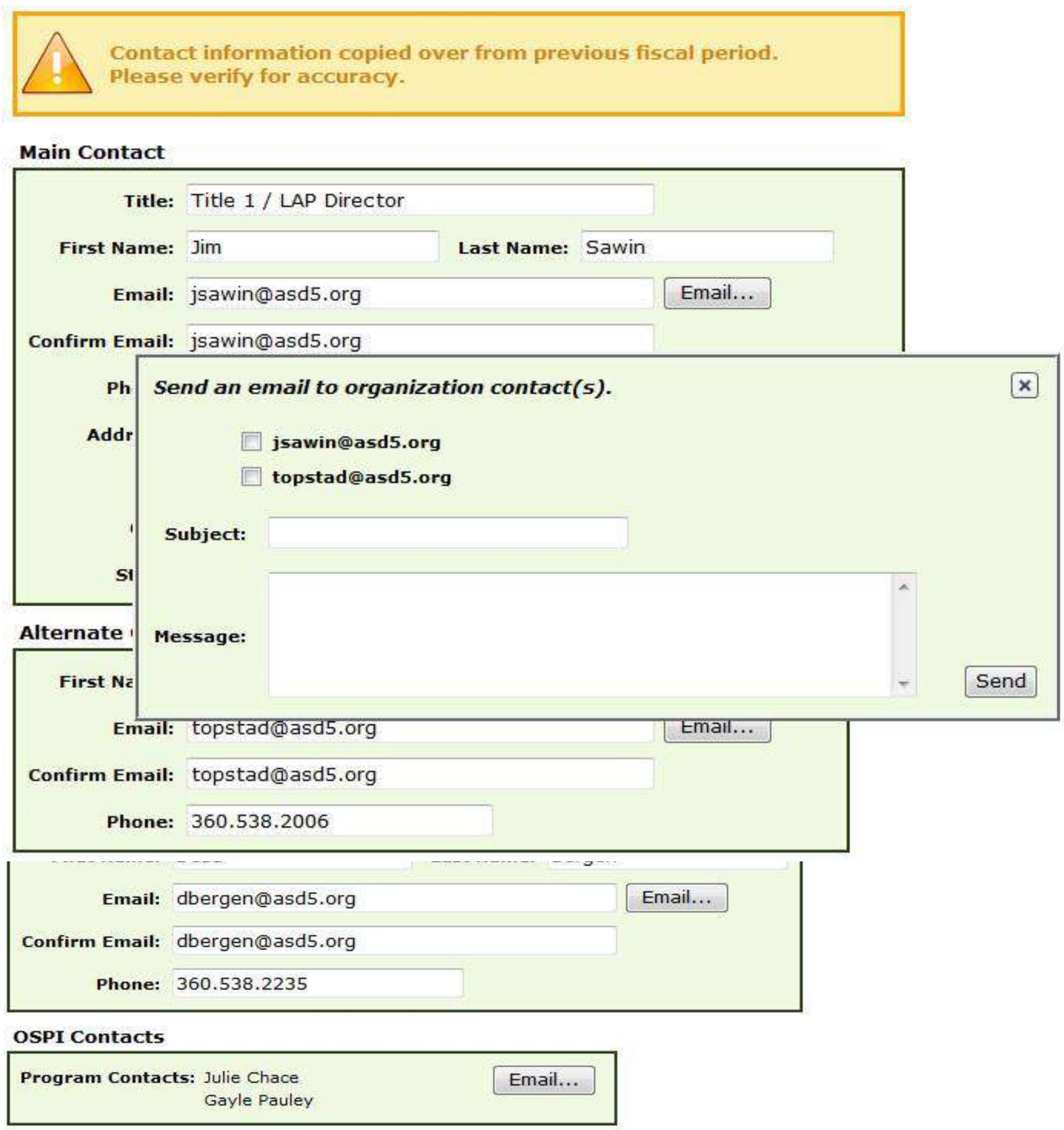

Fiscal Period 13-14
681 Washington Reading Corps - RFP
Current Form Package Status: Requested OSPI Approval
Profile Page
Instructions
Select a Form Package
Report Tool
Help
Begin Review
Contact
RFP
Notes
This Form Package Now Ready For OSPI Review.
Press Begin Review button and check optional email check box to begin review.
Email (Optional):
Send notification indicating OSPI form package review has begun.
This email goes to the form package program contact and grants administrator (federal projects director)
Begin Review

Clicking the

2. **Contact tab** displays the form package contact page**.** This tab is informational only. There are **no processing steps** involved with the contact tab.

Notes:

- The user can update contact information at any stage of form package processing. The Save button remains active even after final approval is issued.
- You can **send an email** to form package contacts by clicking on the Email button and selecting the person/s you want to email. These emails will be recorded in the **Notes** section.
- The alert note about contact information being copied over from the previous fiscal period appears on *all* form packages; however, new and/or competitive form packages will display blank fields initially.



Clicking the

3. **Application/RFP/Report** tab (depending on the form package type), displays the form package pages**.** Click the appropriate icon to change each page status.

Notes:

- Select a page, and click **Next** or use the **drop-down** list to navigate between pages.
- Before a form package page is approved, the header bar below the page drop-down displays the Save, Completed, OSPI Review, Needs Work, Approved and Approve All icons.
- Click the **Print** icon to print one page, or select **Print All** to view and print all form package pages.

4. Click the **Budget** tab to review budget information.

Notes:

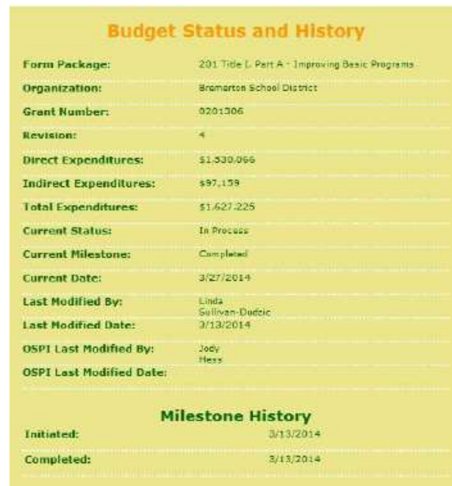
- The budget selector displays all budgets, both originals and revisions.
- To view a budget, click the appropriate budget hyperlink.

Clicking the

Help | Begin Review | Contact | Application | Budget | Approval | Notes

Status	Milestone	Hist.	Print	Access Budget	Grant Number	Form ID	Form Package	Category	Created	Total
In Process	Completed			4	0201306	201	Title I, Part A - Improving Basic Programs		03/13/2014	$1,627,225
Final (Locked)	Revised			3 Carry Over	0201306	201	Title I, Part A - Improving Basic Programs		02/10/2014	$1,627,225
Final (Locked)	Revised			2	0201306	201	Title I, Part A - Improving Basic Programs		12/13/2013	$1,465,732
Final (Locked)	Revised			1	0201306	201	Title I, Part A - Improving Basic Programs		10/16/2013	$1,465,732
Final (Locked)	Revised			Original	0201306	201	Title I, Part A - Improving Basic Programs		07/18/2013	$1,465,732

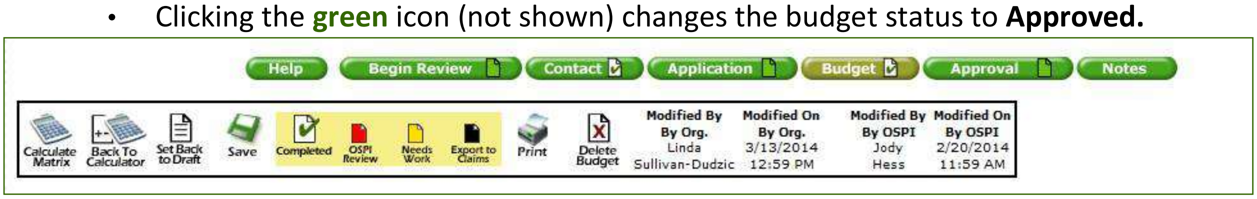
Clicking the icon in the **Hist.** column of the budget selector page displays the **Budget Status and History** page.



Access Budget link on the budget selector page or the **form package name** displays the budget matrix.

Note: The header bar displays the processing icons. These icons are used to change the budget status as follows:

- Clicking the **red** icon changes the budget status to **Under OSPI Review.**
- Clicking the **yellow** icon changes the budget status to **Needs More Work.**
- Clicking the **black** icon changes the budget status to **Exported to Claims.**
- When the budget is entered into the claims system, it will be returned in **Verified by Claims** status, which will display a **blue** icon.
- Clicking the **green** icon (not shown) changes the budget status to **Approved.**



Click the **Back to Calculator** icon to go to the calculator page.

Clicking the

Budget Indirect Rate Calculator	
Allocated Budget Amount:	$1,539,659
Carryover From 12-13:	$45,223
Total Amount:	$1,584,882
Indirect Rate:	0.03930
Indirect Amount:	$59,930
Take Less Than Indirect Amount (optional):	
Budgeted Direct Expenditures: (remainder to distribute within matrix cells)	$1,524,952
Continue Calculate Help	

The Math: Budgeted Direct Expenditures + Indirect = Total Amount The

budget calculator provides details such as:

- The **Allocated Budget Amount** will be either hard-coded, if uploaded—as shown in the above illustration—or there will be an open field for manual entry.
- **Carryover** from previous fiscal period, if applicable.
- The **Indirect Rate/Amount** reflects the indirect type (determined by OSPI program managers) and is based on indirect rates posted annually to iGrants.

  Note: There is an **open field** for taking ***less than*** the indirect amount allowed (optional). This field should be ignored if the organization is taking the entire indirect. If taking less than the posted indirect amount, they must click **Calculate** after entering the lesser amount to recalculate the **Budgeted Direct Expenditures.**
- The **Direct expenditure amount** is the amount to be manually entered in the budget matrix fields.

- Press **Continue** to display the full budget matrix.

Note: If an error message comes up while working on the budget, the error must be corrected before the system will allow the user to continue. If the user exits the budget before satisfying the error message, changes will not be saved.

5. Clicking the **Approval** tab displays the approval options. Click the **Go** button to bring up the appropriate email to send to the organization. This email will be recorded in Notes.

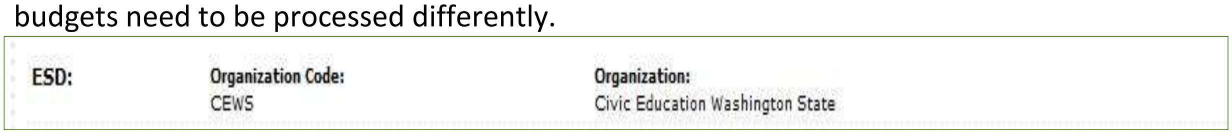
6. Clicking on the **Notes** tab displays system-generated emails.

Notes:

- By default, only the most recent email displays initially. To display the entire list of system-generated emails, click on the **Show All** button. The Show All button changes to **Collapse** and toggles between the two functions.
- To manually add a note, type a note in the field provided then click on the **Add** button. Your name and current date will be recorded to the left of your message, but the message will not "go" anywhere. Someone would have to go to **Notes** to see it.

Budget Processing for Non-Profit Organizations (NPOs)

If you have an organization – usually a non-profit organization (NPO) – that has letters for their organization code (shown below) rather than the 5-digit org codes districts have, those budgets need to be processed differently.



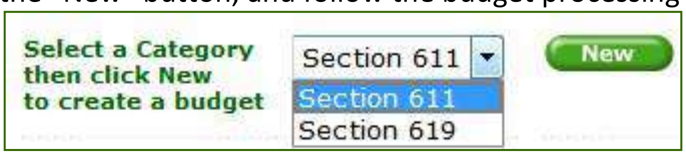
Rather than exporting the budget to claims, you will need to **take a hard copy of the budget to your grants manager** to enter manually into the claims system. After it is entered in the claims system, iGrants will mark it as “Verified by Claims” (budget displays a **blue** icon), and your fiscal agent will send you an email to let you know that the budget can now be approved.

A Note on Budget Categories

In some cases, multiple budgets are allowed for a single application. This can be accomplished by using budget categories. The example below shows two original budgets for FP 267: one for Section 611, and one for Section 619. Having two separate budgets allows for each funding source to be tracked independently.

Status	Milestone	Hist.	Print	Access Budget	Grant Number	Form ID	Form Package	Category	Created	Total
In Process	Completed			Original		267	Special Education IDEA Part B Sections 611 and 619	Section 611	06/21/2012	$770,010
In Process	Completed			Original		267	Special Education IDEA Part B Sections 611 and 619	Section 619	06/21/2012	$41,486

When more than one budget category is available, the district will select from the drop-down list *before* clicking the “New” button, and follow the budget processing steps described above.



Another example of **multiple budget categories** is FP 208. Each of the categories below is visible to any organization that has access to FP 208. Each organization would select one or more categories, as appropriate, to represent the different entities within their jurisdiction.

Approving a Form Package

1. To **approve a form package**, all application pages—as well as the budget (if applicable)—must first be approved. Green icons will display in the respective tabs. (The Contact tab icon will always remain white but must display a check mark to indicate completion.)

2. Once all the application pages and budget are approved, the **final approval email** option found under the Approval tab becomes available. Click “Go” to open and send the email.

Notice that the Final Approval email also serves as the district’s **grant award.**

From: Title II, Part A Teacher & Principal Training & Recruiting Fund - dl_title2quality@k12.wa.us
Use 'DoNotReply@k12.wa.us'. Only use this if you are experiencing problems receiving e-mails.

To: Theresa Laffey - laffey.theresa@yakimaschools.org

CC: Fiscal Officer - Ana Orozco - orozco.ana@yakimaschools.org, Fiscal Officer Alternate - Becky Nissen - nissen.becky@yakimaschools.org, Grant Administrator - york.kelli@yakimaschools.org - york.kelli@yakimaschools.org, Terri Vatne - terri.vatne@k12.wa.us

Subject: **Form Package Title II, Part A Teacher & Principal Training & Recruiting Fund (239)(13-14) has been Approved for Yakima School District**

Message: Organization: Yakima School District
County: Yakima

GRANT AWARD NOTIFICATION (applicable only in form packages requiring budget submissions)

Organization must keep any supporting documentation on file.

This grant award is made for activities described in the approved iGrants form package in the amount shown below. Funding details are specified in the iGrants budget(s).

The project must be conducted in accordance with the activities described in the approved iGrants application and within the applicable regulations of the program.

Obligations of the various funds cannot be made prior to the beginning date or after the ending date shown below.

If you have any questions, please contact the OSPI program office responsible for this form package.

Thank you for your submission.

Grant Award Details

Award Date: 03/28/2014

Form Package 239: Title II, Part A Teacher & Principal Training & Recruiting Fund

Grant Award No: 523254 (Beginning 7/1/2013 and Ending 8/31/2014)

Grant Amount: Final Approval 2013-14 Funding Original #0523254 $883,194

CFDA No: 84.367

Program No: 52
Revenue No: 6152

Competitive Grant (RFP) Process

Designing the Competitive Grant Application

When you set up your competitive grant application, consider the following options:

- Hide or display budget initially
- Upload allocations or leave open field in budget calculator for organization to insert allocation
- Lock form package at due date/time (strongly recommended)

Review Process

After the due date, review the applications and determine which ones will be funded.

Selected for Funding – upload allocations option

Send an Excel spreadsheet to iGrants@k12.wa.us with the following information *prior to* notifying the awardees.

Form Pkg #	Organization Code	Organization Name	Allocation Amt.	Budget Category (if applicable)
3-digits	5-digits if district 4-digits if building Letters if non-profit			

After allocations are uploaded to the system, send the "Needs More Work" (NMW) email which will cause the budget tab to appear.

Note: Be sure you send the NMW email from the Approval tab. If a NMW email comes up when you put a page under NMW status, sending *that* email will *not* bring up the budget.

Selected for Funding – open allocation field option

Send the "Needs More Work" email to bring up the budget tab, and use it to inform the applicant of the amount to enter in the allocation field.

Not Selected for Funding

Send applicants *not* selected for funding the "Issue Unfunded Notification" email—also found under the Approval tab.

Final Steps

When applicants submit their budget, you will receive an email notification. If the budget is approvable, export it to claims. After it is entered into the claims system, you will receive a "Verified by Claims" email signifying that you can now go in and approve the budget.

All form package pages as well as the budget must be approved before the "Final Approval Issued" email will appear as an option in the list of emails found under the Approval tab.

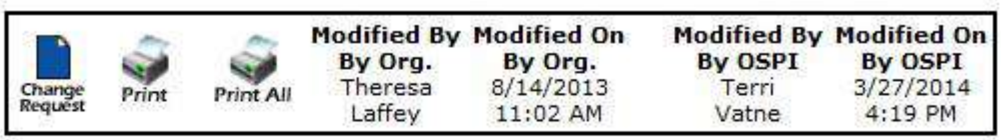
Note: The final approval email is also the organization's grant award.

Post-Approval Changes

Form Package Pages

1. To change data on a page *after* form package approval, either the district can use the blue **Change Request** icon or OSPI can use the yellow **Unlock Page** icon, depending on who is initiating the change.

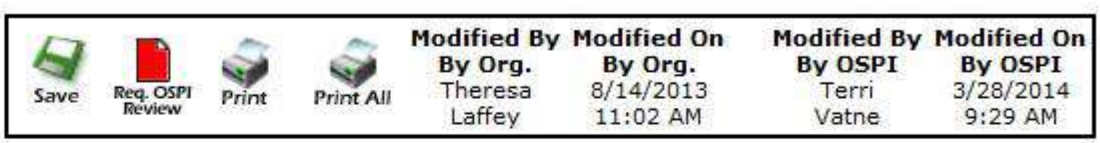
   This is what the district sees.



This is what OSPI sees.

Note: Clicking either icon will bring up an email to send to the other party. The form package status will remain **Final Approval Issued**, but **Forms Unlocked for Changes** will appear on the Form Package Selector page once a page is unlocked.

2. When districts have finished making their changes, they will click the red **Req. OSPI Review** button to bring up the notification email.



3. After reviewing the changes, OSPI staff will either send it back for further changes using the Needs More Work icon or mark the page approved.

Budget Revisions

In most cases, budget revisions will be initiated by the district or other outside organization, though the system will allow OSPI program staff to create them as well. The steps below describe the process followed to create a budget revision and steps to finalize.

District Steps:

1. Click on the last budget that was approved.
2. Click on the **Create Revision** icon. This will take you to the budget calculator.
3. Click **Continue** to access a copy of the existing budget.
4. Manually shift dollar amounts to the desired objects and activities.
5. **Save** (this step calculates the budget matrix).
6. **Mark the budget complete** to display the check mark in the budget tab.
7. Click the red **Request OSPI Review** icon, and send the email to notify OSPI.

OSPI Steps:

1. OSPI program staff now click on the **OSPI Review** icon to put budget in review status.
2. If approvable, OSPI program staff **Export** the budget to claims.
3. Claims returns the budget as **Verified by Claims.**
4. OSPI program staff **Approve** the budget revision, setting the stage for another budget revision, if necessary, in the future.

Note: If an error message comes up while working on the budget, the error must be corrected before the system will allow the user to continue. If the user exits the budget before satisfying the error message, changes will not be saved.

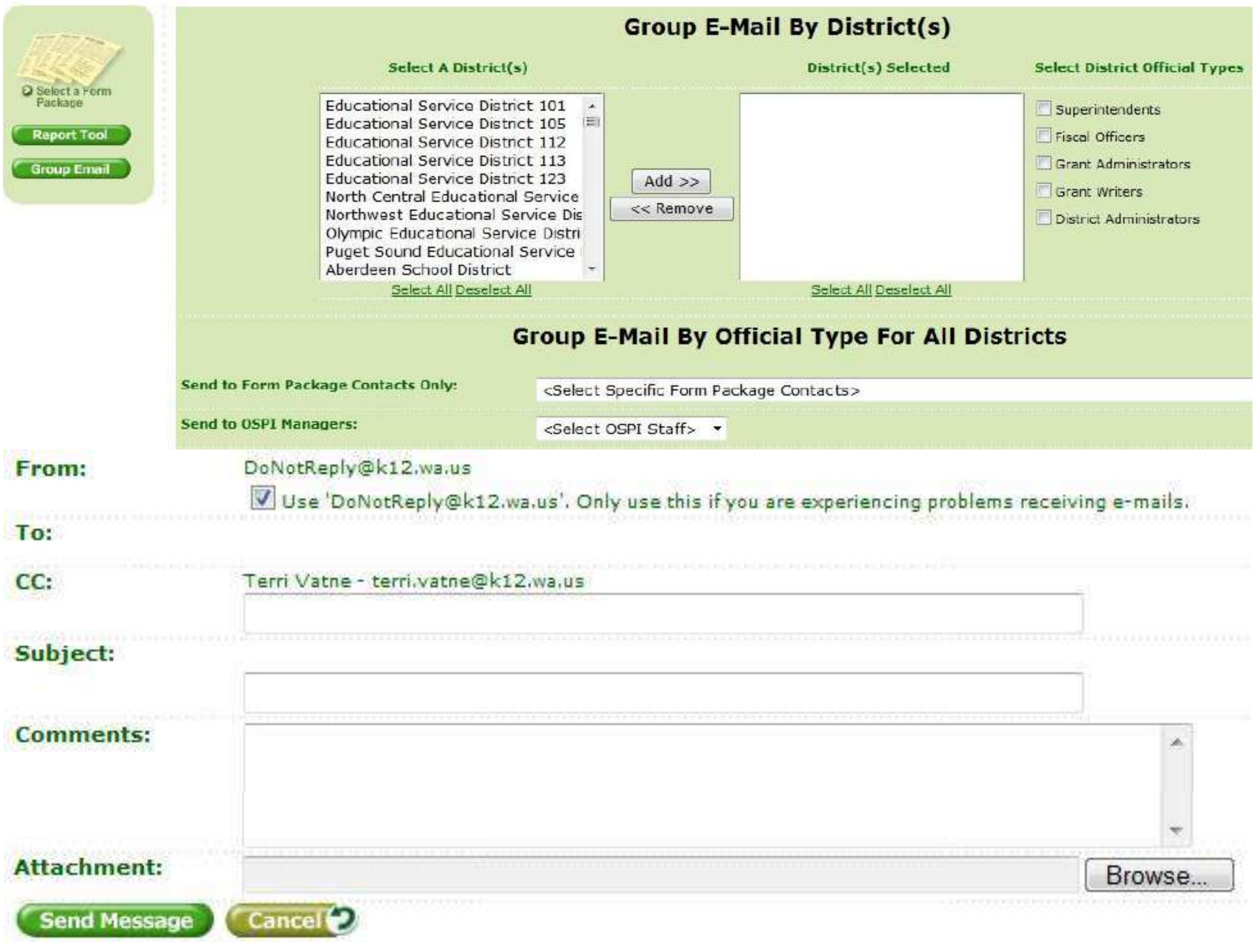
iGrants Features

Group Email

You can use the group email notification to inform district and/or ESD officials of a new form package and to communicate with their specific form package contacts.

Notes:

- Select organization recipients and click the **Add** button. The selected organizations will appear in the field to the right.
- Select **Official Types** by checking the box next to the type.
- To send messages to specific program contacts, select the form package name using the **Select Specific Form Package Contacts** drop-down.
- Click the **DoNotReply** box to prevent the email from ending up in recipient's junk mail.
- Enter text in **Subject** and **Comments** sections**.**
- Use the **Browse** button to upload any attachments.
- Click the **Send Message** button to send the email.
- Clicking the **Cancel** button will cancel and reset all the fields on the page.



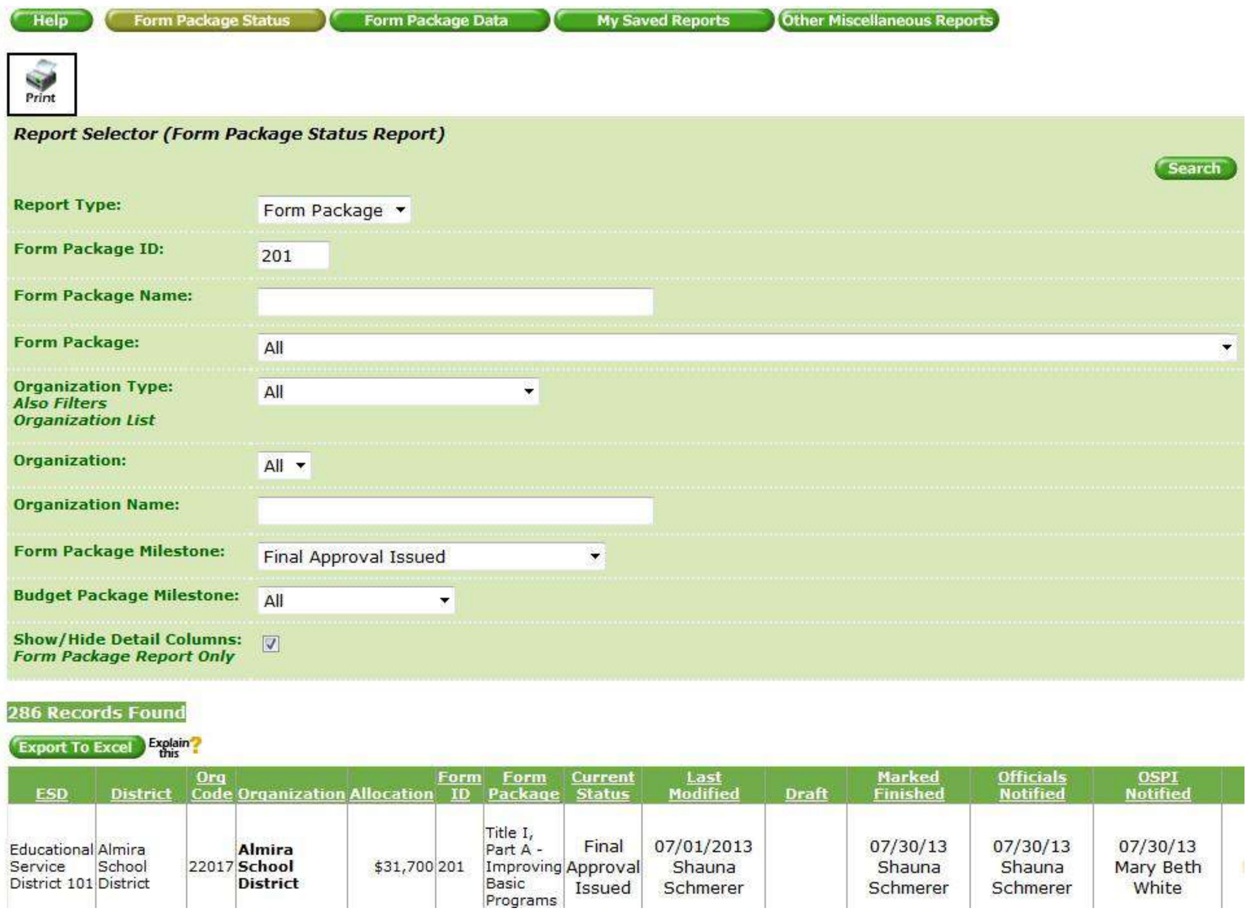
Report Tool

By using the Report Tool, you can generate reports to view, print, or save to Excel.

1. The **Report Tool button** is located in the left-hand navigation bar.
2. Clicking the **Form Package Status** tab displays a page which allows you to list a form package or budget by status.

   Notes:

   - Use the drop-down to select report type.
   - Enter form package ID (3 digit number) and customize the other fields to generate desired results.
   - Click the Search button.
   - Click the Export to Excel button to save data on your personal computer.



3. Clicking the **Form Package Data** tab displays the report selector page with the ability to select individual data fields to be displayed on the report.

   Notes:

   - Select the form package by using the drop-down.
   - Select form package page.
   - Select the fields that you want to display in the report by checking the boxes next to the field name.
   - Click the **Save Report to My Reports** checkbox to select the data elements to be displayed on the report. (You can only select data from one page per report.)
   - Enter the report name and click **Save**.
   - Click the **Go** button to view the report.
   - Click the **Export to Excel** button to export the report in Excel format.

4. If you don't want to Export to Excel initially, you can do it later by clicking the **My Saved Reports** tab which displays your saved reports.

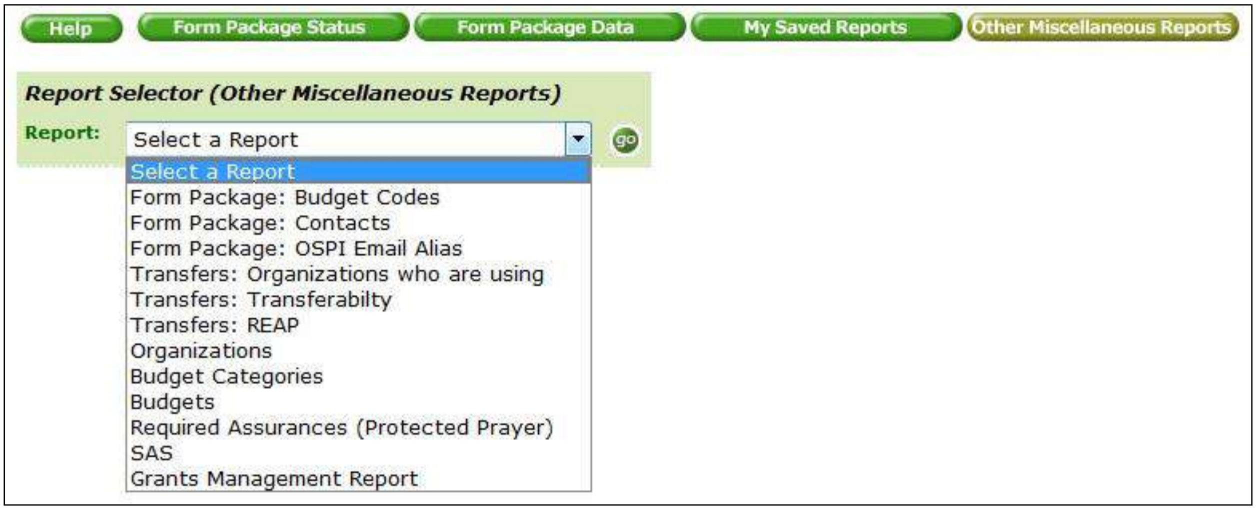
   Notes:

   - Click the **report name** link to display the report.
   - A prompt will ask whether you want to **Open** or **Save** the report.
   - Open and **Save report** to desired location in Excel format.

5. Clicking the **Other Miscellaneous Reports** tab lists various predesigned reports.

   Notes:

   - Select a report and click the **Go** button.
   - Follow the steps listed above in #3 and #4 to export to Excel.



Track Changes

Purpose

The iGrants track changes feature addresses the need to identify changes to a form package after it was copied from the prior fiscal period or OSPI has returned it to an applicant organization for needed changes.

How It Works

When pre-determined milestones occur (e.g., “Needs More Work” during initial review or “Unlock Page” for post-approval changes), a snapshot is taken of the values on each page where the milestone occurs. If a change is made to a value on a page with such a snapshot, a banner will display at the top of the page, and a message or button will appear directly below each changed value.

For example, when form package data is copied over from a previous fiscal period, snapshots are taken of every page in the form package. Any changes made prior to submission will be displayed as explained in the examples below.

When a change is made on a page which has a snapshot, a banner displays at the top of the page.

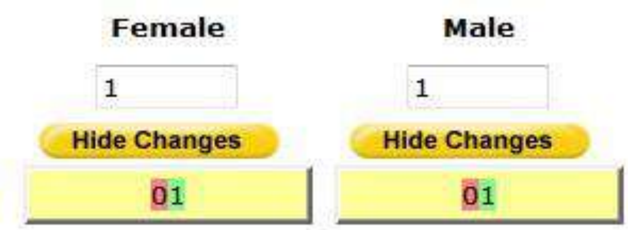
Clicking on the blue circle will provide further details about the change.

In general, a button or message appears directly below each changed value. The following examples explain what to expect for each type of data field.

Numerical Field: A **View Changes** toggle button appears.

Clicking the **View Changes** button will open a box displaying the field with deleted and added numbers highlighted. Deleted number is highlighted in red. Added number is highlighted in green.

Example:



After reviewing the changes, clicking on **Hide Changes** button will collapse the track changes display.

Text Box: A **View Changes** toggle button appears.

Clicking the **View Changes** button will open a box displaying the text with deleted and added text highlighted. Deleted text is highlighted in red. Added text is highlighted in green.

Example: There are presently currently 227 8th grade students at XYZ Junior High.

After reviewing the changes, click the **Hide Changes** button to collapse the track changes display.

Radio Button: A message appears indicating the former response.

Example:

Have 50 percent of your teachers been trained? ○ Yes ◉ No

Changed from Yes

Drop Down: A message appears indicating the former response.

Example: **Yes**

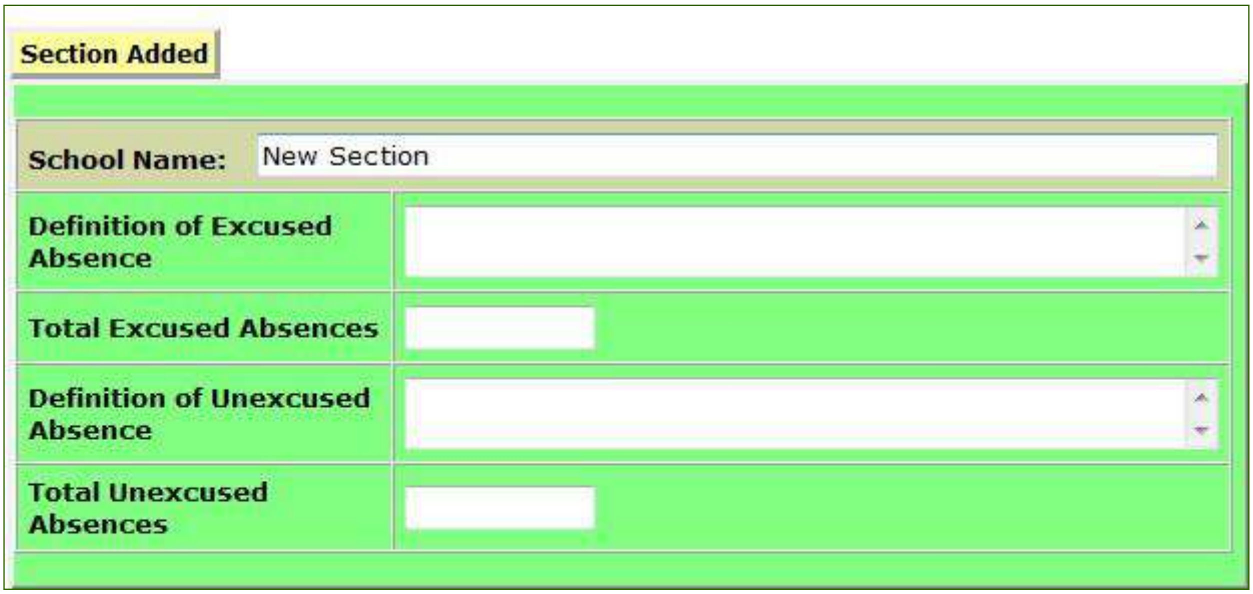
Changed from Yes

Check Box: The message “Changed” appears, meaning if it’s checked now, it wasn’t before, and vice versa.

Example:

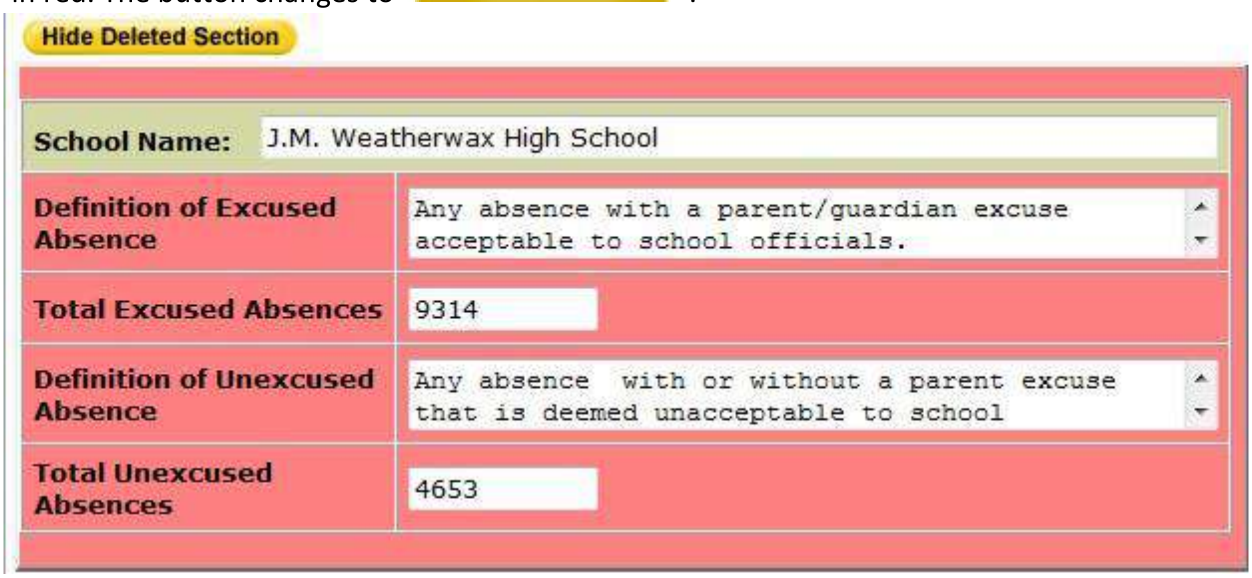
Changed

"New" Section Added: The message "Section Added" appears. The added section is highlighted in green.



"New" Section Deleted: The Show Deleted Section toggle button appears.

Clicking the Show Deleted Section button will display the deleted section highlighted in red. The button changes to Hide Deleted Section .



Snapshots Deleted:

Event: An OSPI Program Manager Approves a page.

Track Changes Response: The snapshot of the page is deleted if a snapshot existed. All track changes buttons and banners disappear.

Note: Track changes buttons and banners will not show up on a printed copy.

If you need further assistance, please contact iGrants at:

(360) 725-4956 or iGrants@k12.wa.us.