

Office of Superintendent of Public Instruction

## iGrants User Training Manual

# iGrants User Manual – OSPI

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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), agreements, and end-of-year reports.

## Training Manual Purpose

In an effort to make iGrants a more user-friendly system, enhancements are ongoing. This training manual serves as an introduction to operate the upgraded iGrants system.

This manual is structured so that one can work at his/her own pace by following the system navigation steps. Screenshots are provided to illustrate the various iGrants processes.

## Audience

OSPI program staff can use this training manual to learn how to operate the iGrants system and generate data exports and reports.

## Gaining Access to iGrants

The procedures for gaining access to iGrants are listed below.

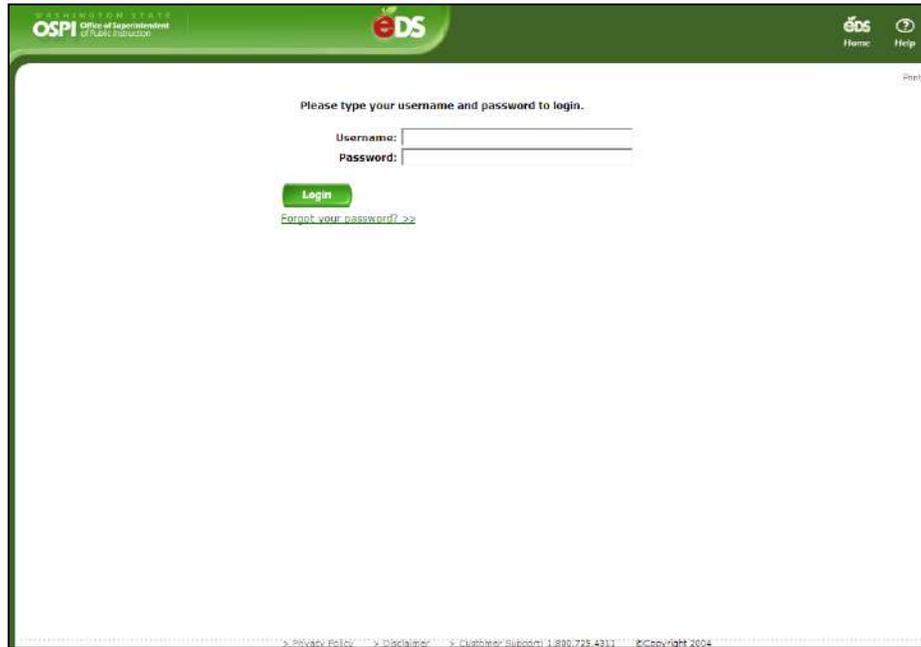
- **School Districts:** All users must contact their district security manager. A list of district security managers is located on the iGrants home page under the **Obtain User Login Credentials** link.
- **All other organizations** (listed below) must contact OSPI Customer Support by calling **(800) 725-4311, Option #1** or emailing [CustomerSupport@k12.wa.us](mailto: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.)

## 1. Logging Into iGrants (All Users)

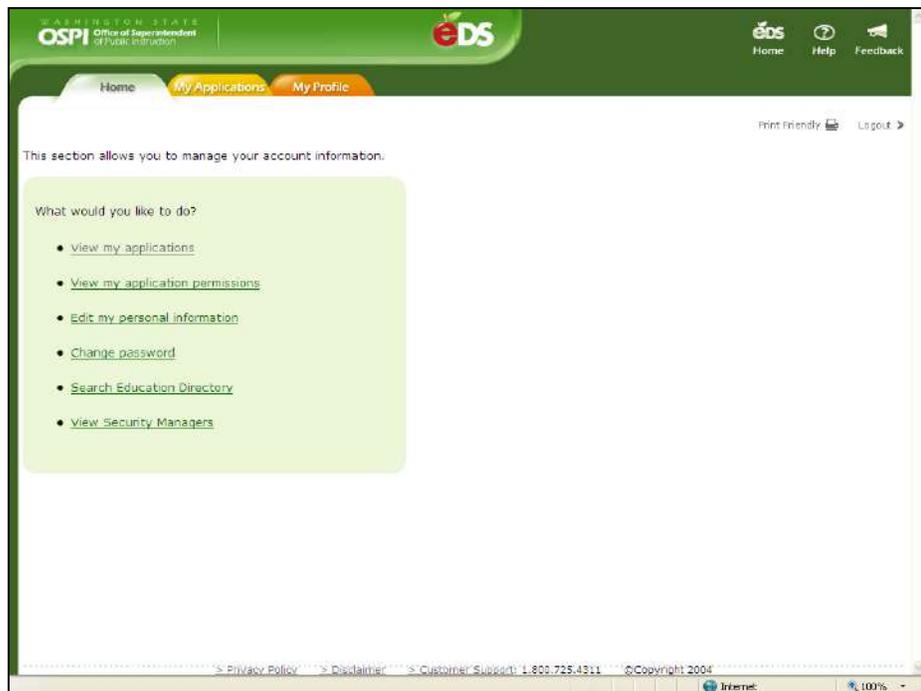
1. From the EDS Login screen, type your **Username** and **Password** and click **Login**. The EDS home page opens.

The URL to use is:

<https://eds.ospi.k12.wa.us/Login.aspx>



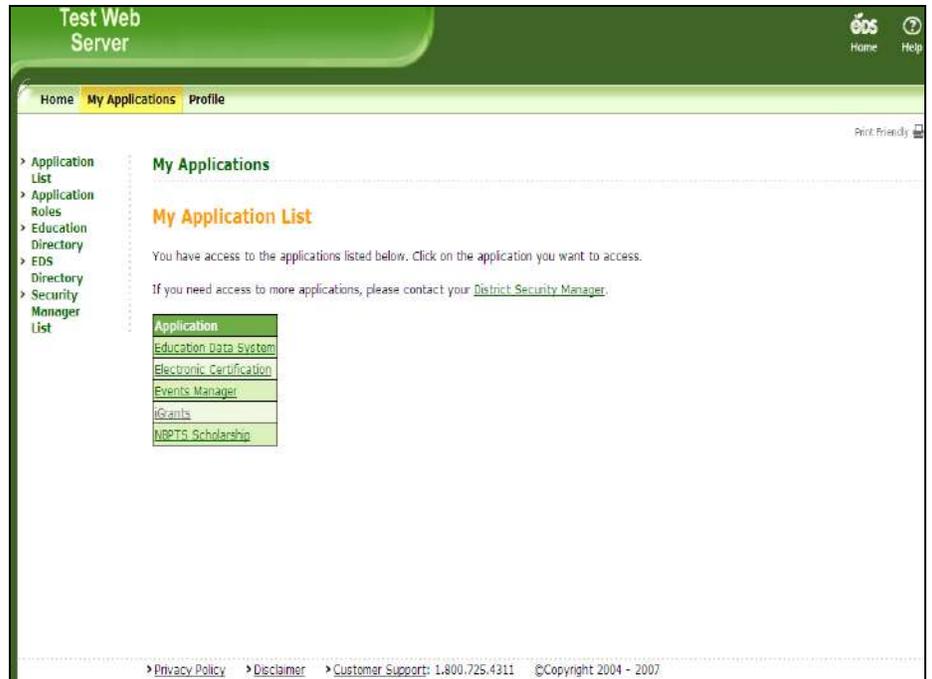
2. From the EDS home screen, click on the **My Applications** tab. The My Application page opens.



- From the My Applications screen, click on the link to the **iGrants** application.

**Note:**

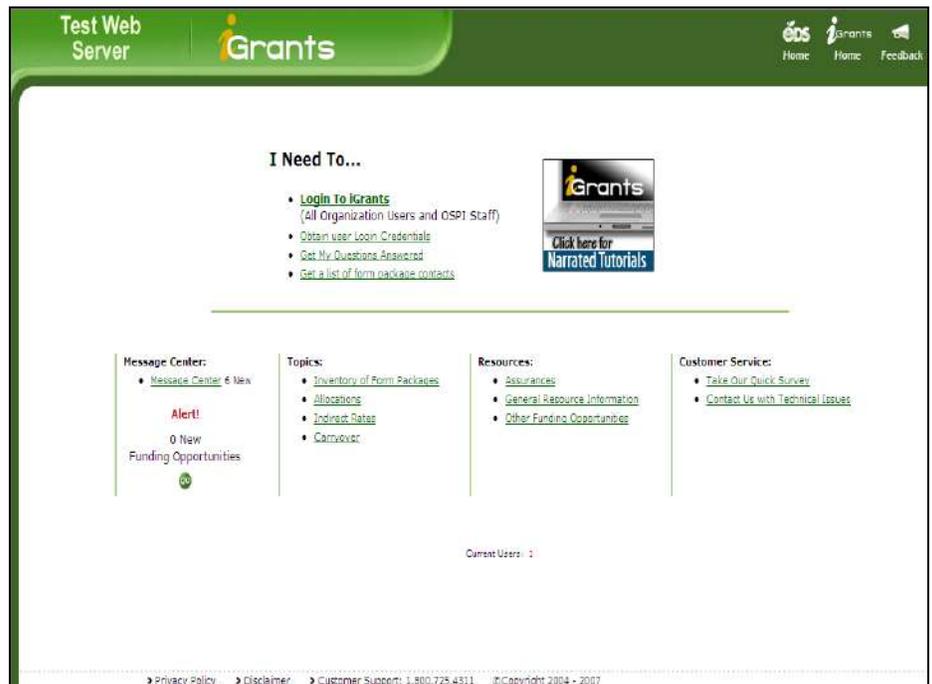
- Each user's My Application List will contain different links. If yours does not display the **iGrants** link, contact Customer Support at 1.800.725.4311, Ext. 1.



- Clicking iGrants on My Application page displays the iGrants home page screen. You can click on **Login to iGrants** to go into the iGrants application. (If you have already logged into the EDS system, you are not required to login again.)

**Note:**

- From the iGrants login page, **set a bookmark** to make future logins quicker.
- The EDS applications – which include iGrants – are designed to use **Internet Explorer 6.0** or greater as the Web browser. It is best not to use other browsers. See Appendix A for details about browser settings.



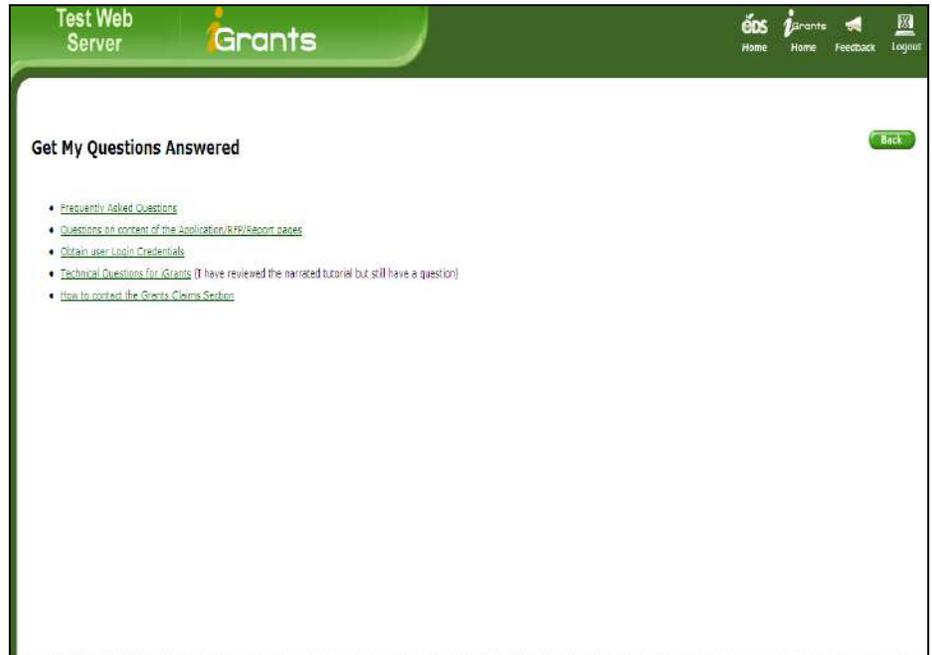
## 2. iGrants Home Page

### 2.1 I Need To...

1. Depending upon what you need to do, you can navigate to various pages by clicking the appropriate link from iGrants home page.

#### Notes:

- Clicking **Login to iGrants** would take you to the iGrants login page.
- Clicking the following links will display pages with corresponding information:
  - **Obtain user Login Credentials**
  - **Get My Questions Answered**
  - **Get a list of form package contacts**

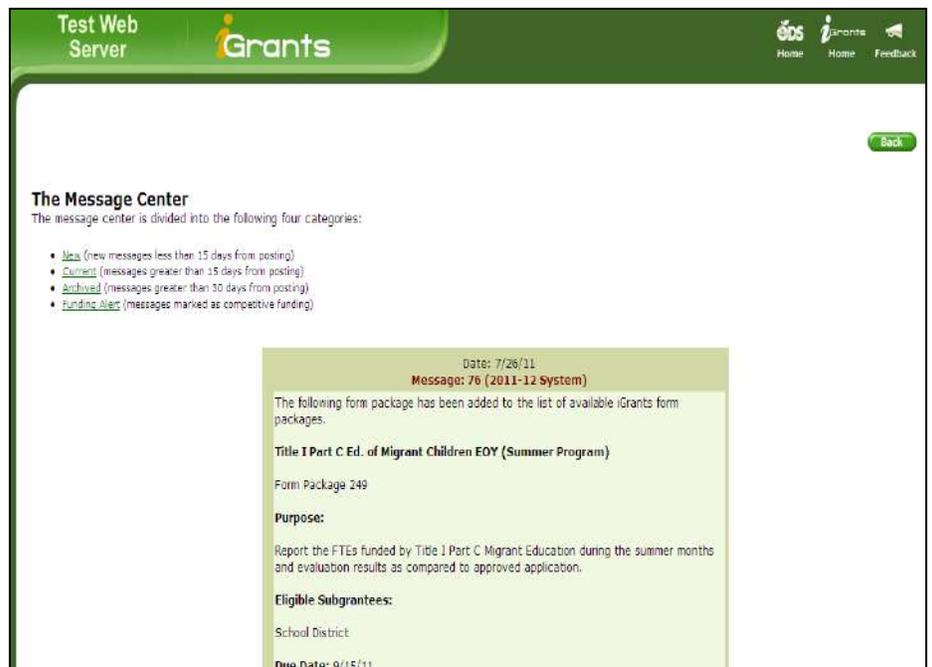


### 2.2 Message Center

1. Clicking the **Message Center** link on iGrants home page displays the Message Center page. This page is used to display any New, Current, or Archived messages.

#### Notes:

- Click on the appropriate link (**New, Current, or Archived**) to see messages.
- Click the **Print** icon to print the page.



## 2.3 Topics

- The iGrants home page also displays links to the following Topics:

- ❖ **Inventory of Form Packages**
- ❖ **Allocations**
- ❖ **Indirect Rate**
- ❖ **Carryover**

### Notes:

- Clicking the **Inventory of Form Packages** link displays a list of form package types.
- Use the fiscal year drop-down to see form packages from prior years.

- Clicking the link for **form package type** or **organization** on the Inventory of Form Packages page displays the form package details and the contact information.

### Note:

- Click the **Back** button to go back to the inventory page.

FP ID	FP Name/Profile	Type/Audience	Program Area	Status	Activation Date	Due Date	Funding Amounts	OSPI Program Contact	Grant Analyst	Budget Information
221	<a href="#">Educational Leadership Intern Program</a>	State School Grant District	Principals Association AWSP	Open	6/16/2011	8/12/2011		Linda Thomas AWSP 360.357.7951 linda@ensp.org	Staci Brooks Director, Grants Management 360.725.6278 staci_brooks@k12.wa.us	<a href="#">Go</a>
409	<a href="#">Full-Day Kindergarten (Base Only)</a>	State School Grant District	Early Learning	Open	6/22/2011	7/15/2011		Mercedes Eckroth Program Support 360.725.4952 mercedes.eckroth@k12.wa.us		
359	<a href="#">Full-Day Kindergarten (Renewal)</a>	State School Grant District	Early Learning	Open	6/10/2011	6/27/2011		Mercedes Eckroth Program Support 360.725.4952 mercedes.eckroth@k12.wa.us		
217	<a href="#">Highly Capable Students Program</a>	State School Grant District	Highly Capable	Open	6/9/2011	7/1/2011	<a href="#">Go</a>	Gayle Pauley Director 360.725.6100 gayle.pauley@k12.wa.us	Steve Shish Apportionment Steve.Shish@k12.wa.us	<a href="#">Go</a>
								Jody Heis Program Supervisor 360-725-6130 Jody.Heis@k12.wa.us		
								Sandy Benedetti Program Support 360-725-6101 sandy.benedetti@k12.wa.us		
218	<a href="#">Learning Assistance Program (LAP)</a>	State School Grant District	Special Programs and Federal	Open	6/3/2011	7/1/2011	<a href="#">Go</a>	Gayle Pauley Director 360.725.6100	Steve Shish Apportionment Steve.Shish@k12.wa.us	<a href="#">Go</a>

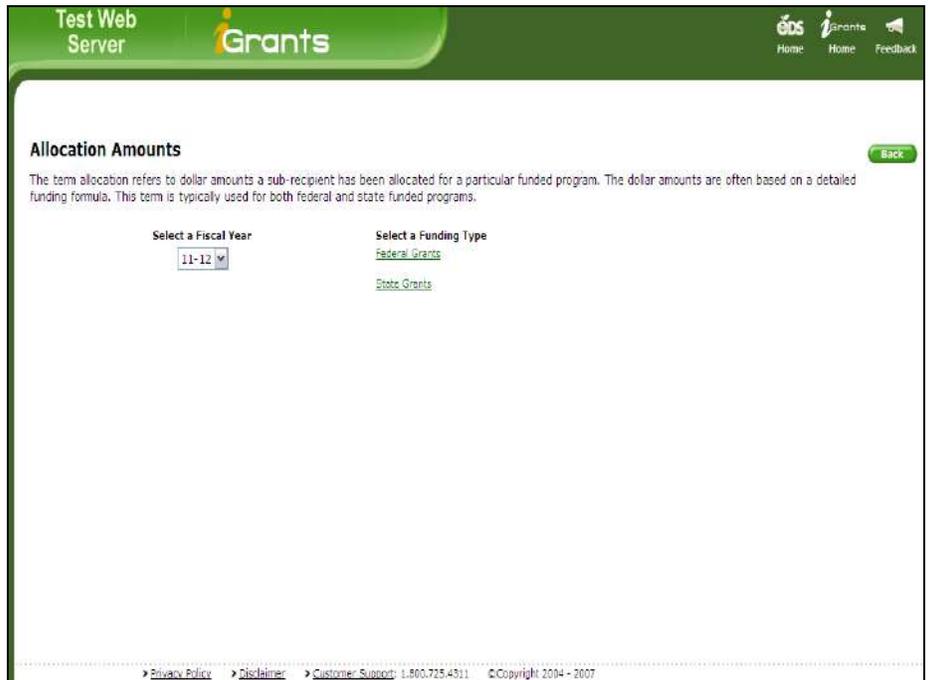
- Clicking the **FP Name/Profile** link or **Go**, the page refreshes to display the form package profile page.



- Clicking the **Allocation** hyperlink on iGrants home page displays the **Allocation Amounts** page. You can also use the drop-down filter to view allocations for prior years or by funding type.

**Note:**

- The fiscal year defaults to the current year.



- Clicking a **Funding Type** link on Allocation Amounts page displays allocation amounts for different form packages sorted by organization name.

**Notes:**

- Click the **Back** button to go back to the Inventory page.
- Click the **Print** icon to open the page in printer friendly view.

**Allocations**  
Federal Funded for: 10-11

District	CoDist ID	Organization	Form Package ID	Form Package	Amount
	BGCSP	Boys and Girls Clubs of South Puget Sound	364	21st Century Community Learn Centers (Continuing Awards - Consortium)	\$335,275
	CFIC	Camp Fire USA Inland NW Council	363	21st Century Community Learn Centers (Continuation Awards - District)	\$194,000
	19901	Central Washington University	436	Special Education State Needs Projects	\$264,244
	19901	Central Washington University	436	Special Education State Needs Projects	\$36,033
	CSL	Communities in Schools of Lakewood	540	21st Century Community Learn Centers (New Applicants - District)	\$72,000
	CSCWG	Community Schools Collaboration of King County	426	21st CCLC Cohort 5 (Continuing Awards - District)	\$410,510
	DECCA	Distributive Education Clubs of America	388	Student Leadership - Federal (Selected Recipients Only)	\$24,000
	32801	Educational Service District 101	209	Title I Part D Subpart 1 N or D State Agency	\$32,158
	32801	Educational Service District 101	231	Title III LEP (Consortium Package)	\$0
	32801	Educational Service District 101	232	Title III LEP (District Package)	\$0
	32801	Educational Service District 101	267	Special Education IDEA-B and Section 619 (District Package)	\$10,167
	32801	Educational Service District 101	267	Special Education IDEA-B and Section 619 (District Package)	\$0
	32801	Educational Service District 101	293	AARRA CSA Ed Tech Support Center (ETSC) ESDs 101, 112, 121	\$13,500
	32801	Educational Service District 101	356	Title I Part D Training Proposal - Mini Grant	\$2,260
	32801	Educational Service District 101	422	Prevention Intervention Services Program (Federal)	\$521,097
	32801	Educational Service District 101	426	21st CCLC Cohort 5 (Continuing Awards - District)	\$400,274
	32801	Educational Service District 101	452	Title I Part D Education Advocate Project	\$91,050
	32801	Educational Service District 101	452	Title I Part D Education Advocate Project	\$41,050

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

**Note:**

- The fiscal year defaults to the current year.

**Indirect Rates**

An indirect rate allowed by most grants helps subgrantees to offset the cost of providing program services. Not all grants allow an indirect rate to be applied. The programs that do allow an indirect rate are based on either a restricted, unrestricted, or state recovery percentage. Indirect cost limits ensure that state and federal moneys are expended for intended uses and for allowable costs. Allowable costs include expenditures directly traceable to the program (direct expenditures) plus a limited allowance for overhead or indirect expenditures.

Select a Fiscal Year

- Clicking the  button on the **Indirect Rates** page displays the indirect rates by type for organizations by the selected fiscal year.

**Notes:**

- Click the **Back** button to return to previous page
- Click the **Print** icon to print the page.

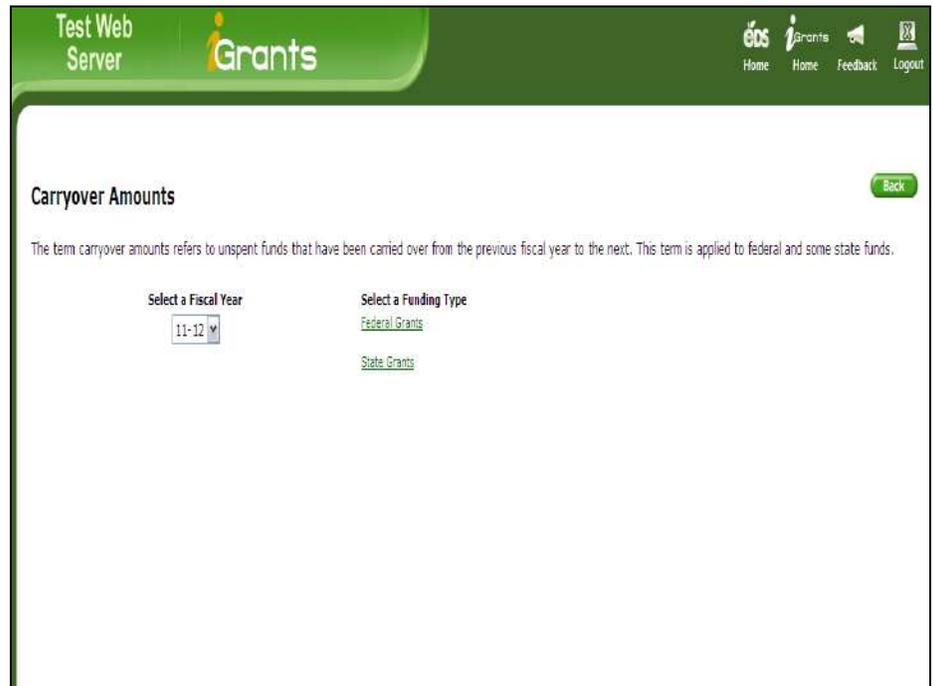


CoDist ID	Organization	Restricted Rate	Unrestricted Rate	Recovery Rate
14005	Aberdeen School District	0.0325	0.1097	0.1421
01226	Adna School District	0.0318	0.186	0.1898
22017	Almira School District	0.0472	0.2447	0.2921
09103	Ancworte School District	0.0256	0.1542	0.1627
01016	Arlington School District	0.0203	0.1296	0.1428
02420	Austin-Anatone School District	0.0522	0.1563	0.1901
17408	Auburn School District	0.0275	0.1285	0.1244
18303	Bainbridge Island School District	0.0387	0.1741	0.1825
17931	Bates Technical College	0.1	0.0	0.0
06119	Battle Ground School District	0.037	0.1529	0.1529
17405	Bellevue School District	0.0347	0.1573	0.1603
07001	Bellingham School District	0.0397	0.1519	0.1592
01122	Benge School District	0.0349	0.2645	0.3025
07403	Bethel School District	0.0302	0.1911	0.1414
10103	Birkleton School District	0.0502	0.1755	0.1982
07503	Blaine School District	0.0207	0.169	0.1841
11234	Boistfort School District	0.0493	0.2944	0.3788
08100	Bremerton School District	0.0617	0.1948	0.1797
24111	Brewster School District	0.028	0.1863	0.198
09075	Bridgeport School District	0.0449	0.1777	0.1795
10046	Brimmon School District	0.1296	0.2417	0.3005
09100	Burlington-Edison School District	0.0435	0.1724	0.1810
06117	Camas School District	0.0394	0.1492	0.1682
08401	Cape Mudge School District	0.0322	0.1841	0.2199
17019	Carbonado School District	0.0545	0.3034	0.326
04228	Cascade School District	0.022	0.1598	0.1775
04127	Cascade School District	0.0451	0.1427	0.2018

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

**Notes:**

- Select a **Fiscal Year** from the drop-down. The fiscal year defaults to the current year.
- Select a **Funding Type** by clicking on the **Federal Grants** or **State Grants** link.



**Carryover Amounts**

The term carryover amounts refers to unspent funds that have been carried over from the previous fiscal year to the next. This term is applied to federal and some state funds.

Select a Fiscal Year: 11-12

Select a Funding Type:

- [Federal Grants](#)
- [State Grants](#)

9. 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.

**Notes:**

- Click the **Back** button to return to previous page.
- Click the **Print** icon to print the page.

Coelist ID	Organization	Form Package ID	Form Package	Amount	Budget Category
2034	A J West Elementary	366	EETT Peer Coaching (Selected Recipients Only)	\$3,503	
2034	A J West Elementary	502	ARRA Peer Coaching (Carryover Only)	\$468	
2034	A J West Elementary	503	ARRA Teaching and Learning in the 21st Century (TL21)	\$2,425	
14005	Aberdeen School District	201	Title I, Part A Improving Basic Programs	\$365,030	
14005	Aberdeen School District	208	Title I Part D Subpart 2 Neglected or Delinquent Local Agency	\$19,953 2010-11	
14005	Aberdeen School District	232	Title III LEP (District Package)	\$48,058	
14005	Aberdeen School District	238	Title II Part D Enhancing Education Through Technology	\$3,172 2010-11 Funding	
14005	Aberdeen School District	239	Title II Part A Teacher Principal Training and Retraining	\$200,058	
14005	Aberdeen School District	262	Rural and Low Income School Grant	\$7,116	
14005	Aberdeen School District	267	Special Education IDEA-B and Section 619 (District Package)	\$38,868 IDEA-B	
14005	Aberdeen School District	267	Special Education IDEA-B and Section 619 (District Package)	\$2,344 Section 619	
14005	Aberdeen School District	416	21st Century Community Learn Centers (Continuing Awards - District)	\$75,290	
14005	Aberdeen School District	426	21st CCLC Cohort 5 (Continuing Awards - District)	\$73,580	
14005	Aberdeen School District	482	ARRA Title I Part A	\$170,191	
14005	Aberdeen School District	485	ARRA McKinney-Vento Homeless Children and Youth	\$5,101	
14005	Aberdeen School District	487	ARRA Special Education (IDEA B and Section 619) Carryover Funds	\$300,731 IDEA-B	
14005	Aberdeen School District	487	ARRA Special Education (IDEA B and Section 619) Carryover Funds	\$12,847 Section 619	
14005	Aberdeen School District	500	ARRA Title II Part D (Carryover Only)	\$9,456	
3209	Abraham Lincoln Elementary	366	EETT Peer Coaching (Selected Recipients Only)	\$1,601	
3209	Abraham Lincoln Elementary	502	ARRA Peer Coaching (Carryover Only)	\$947	
3209	Abraham Lincoln Elementary	503	ARRA Teaching and Learning in the 21st Century (TL21)	\$2,353	
2685	Acme Elementary	503	ARRA Teaching and Learning in the 21st Century (TL21)	\$1,940	
2156	Adams Elementary	366	EETT Peer Coaching (Selected Recipients Only)	\$1,027	
21226	Adna School District	201	Title I, Part A Improving Basic Programs	\$0	
21226	Adna School District	238	Title II Part D Enhancing Education Through Technology	\$1 2010-11 REAP	

## 2.4 Resources

1. Clicking the **Assurances** link on iGrants home page displays a page which describes the purpose of assurances and gives a list of individual federal and state program assurances.

**Note:**

- Select the appropriate fiscal year from the drop-down. The fiscal year defaults to the current year.

**Assurances**

Assurances represent specific requirements a subgrantee (recipient of funds, e.g., school district) must comply with. The general assurance page applies to all federal and state programs housed within the iGrants system. There are nine compliance items ranging from fiscal control, fund accounting procedures, and proper record keeping. This single page must be signed and kept on site by all sub-recipients. In addition to the general assurances, some programs require their own program assurance page, e.g., Title I, District Improvement, and Special Education. All subgrantees must enter the iGrants system to fully process each of the assurance pages, where applicable.

**Fiscal Period**  
11-12

**General Assurances**

- [21st CCLC Cohort 6 \(Continuing Awards - District\)](#)
- [21st Century Community Learn Centers \(Continuation Awards - Consortium\)](#)
- [21st Century Community Learn Centers \(Continuation Awards - District\)](#)
- [21st Century Community Learn Centers \(Continuing Awards - Consortium\)](#)
- [21st Century Community Learn Centers \(Continuing Awards - District\)](#)
- [21st Century Community Learn Centers \(Continuing Grants - Consortium\)](#)
- [21st Century Community Learn Centers \(Continuing Grants - District\)](#)
- [Advanced Placement Test Fee Program: IS](#)
- [College Readiness Initiative: Navigation 101 \(Continuing Recipients Only\)](#)
- [CSA Educational Technology Support Center \(ETSC\)](#)
- [CSA Educational Technology Support Center \(ETSC\)](#)
- [CSA Secondary Education and School Improvement](#)
- [Early Learning and STEW - Exploration and Wonder of the World](#)

2. Clicking any of the program links displays a page with the list of assurances associated with that program.

**Assurances**

21st CCLC Cohort 6 (Continuing Awards - District) for 11-12

Page 1

**Assurances 2011-12**

Before completing this certification, please read assurances carefully.

By signing the Certificate of Assurances, the duly authorized representative of the applicant certifies that the applicant will comply with the assurances pertinent to all applicants and to programs for which the applicant is applying, includes but is not limited to:

- Compliance with all federal requirements of the federal 21st Century Community Learning Centers as detailed in Title IV, Part B of the Elementary and Secondary Education Act of 2001, No Child Left Behind.

The applicant assures to the best of his/her knowledge and belief that the data in this application are true and correct and that the filing of the application has been duly authorized by the governing board of the applicant and that the applicant will comply with the required assurances if funding is approved.

Project applicants are required to sign the Certificate of Assurances, certifying that the applicant will comply with the assurances pertinent to all applicants and to programs for which the applicant is applying. The applicant also certifies that they will comply with the general assurances listed in the consolidated state application (Grants).

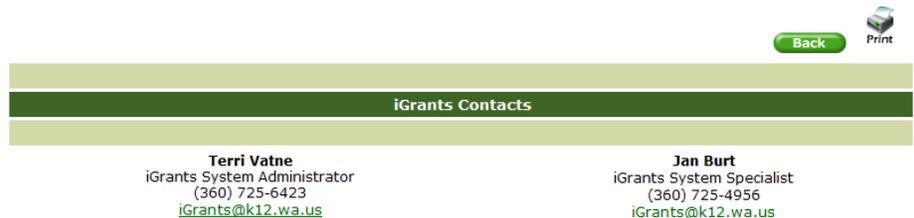
3. Clicking the **General Resource Information** link on iGrants home page displays links to supportive documents on topics such as:

- ❖ ARRA (Stimulus) Guidance
- ❖ DUNS Numbers
- ❖ ESEA
- ❖ Nine Characteristics
- ❖ Transferability & REAP Guidance
- ❖ Time and Effort
- ❖ Comparability
- ❖ Lifecycle of a Grant
- ❖ Dollar Flow (Federal)
- ❖ Dollar Flow (State)
- ❖ Faith Based
- ❖ SAS Timeline



## 2.5 Customer Service

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



### 3. Review Form Package

1. The initial view of the **Form Package Selector** page displays once you log into the iGrants system. The page displays the form package search fields.

**Note:**

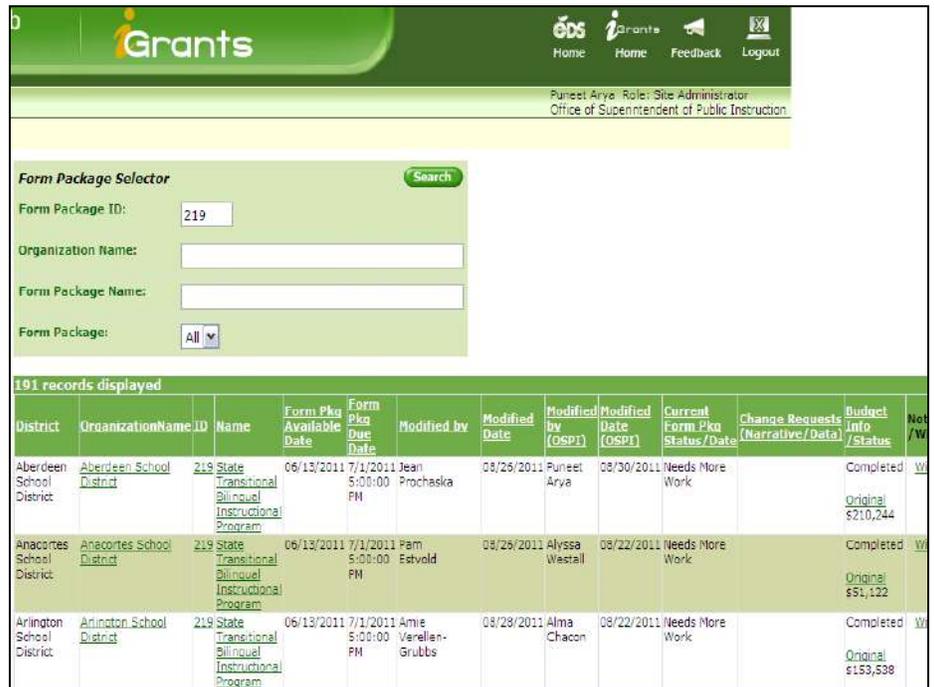
- Before entering the form package ID, select the appropriate fiscal period by using the drop-down.



2. The **Search feature** on the Form Package Selector page is used to find specific form packages.

**Notes:**

- To locate a form package, enter the **3-digit form package ID**, then click Search.
- You can view information on form package name, ID#, available date, due date, current status, and budget info/status.
- The default is to display data sorted by organization, but you can sort differently by clicking on the column headers.
- Selecting **Form Package: All** and clicking **Search** will display all form packages to which you have access.



3. Clicking form package name (link) with status of **Requested OSPI Approval** displays the form package **Begin Review** page.

**Notes:**

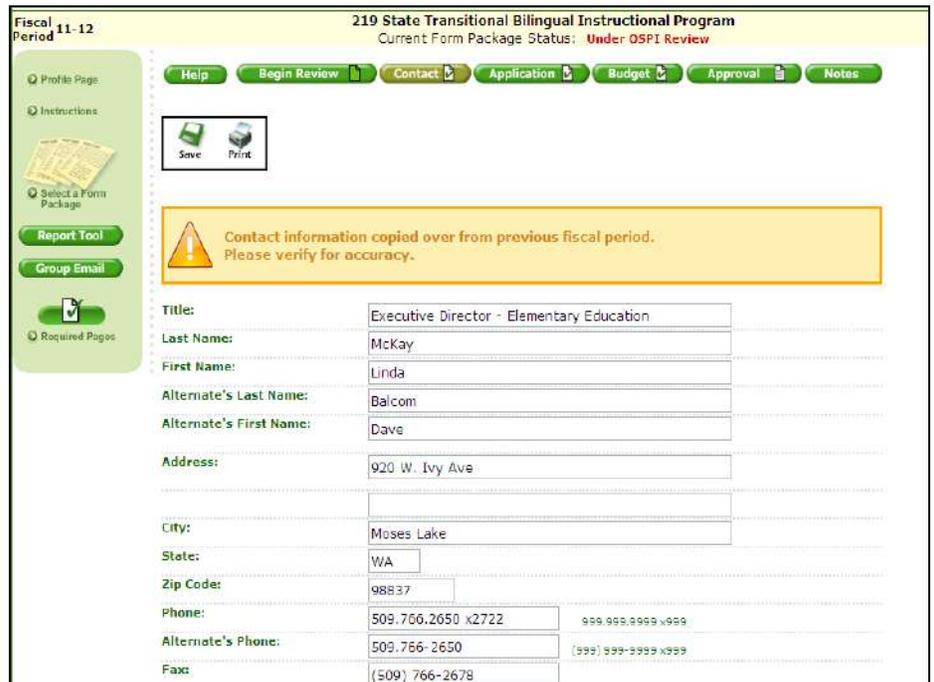
- Selecting the **Email (Optional)** checkbox and clicking the **Begin Review** button will send a notification email indicating the OSPI review has begun.
- Clicking **Begin Review** changes the form package status to **Under OSPI Review**. (The top of the page displays the form package name and the current status.)
- Clicking **Begin Review** also provides the icons (Needs More Work, Under OSPI Review, etc.) necessary to process the form package.



4. Clicking the **Contact** tab displays the form package contact page.

**Notes:**

- User can update data as required and click the **Save** icon.
- Click the **Print** icon to view and print the page.
- As you navigate through the tabs, the tab color changes when selected.



- Clicking the **Application** tab, displays the form package pages. (This tab could also be called RFP, Agreement, or Report, depending on the form package type.)

**Notes:**

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

- Click the **Budget** tab to review budget information. The page refreshes to display the budget selector page.

**Notes:**

- The budget selector displays all budgets regardless of status.
- To view a budget, click the appropriate budget link.
- Click the **Print** icon to print the budget matrix.

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

### Budget Status and History

**Form Package:** 219 State Transitional Bilingual Instructional Program

**Organization:** Chehalis School District

**Grant Number:** N/A

**Revision:** Original

**Direct Expenditures:** \$49,783

**Indirect Expenditures:** \$7,945

**Total Expenditures:** \$57,728

**Current Status:** In Process

**Current Milestone:** Completed

**Current Date:** 9/24/2011

**Last Modified By:** Pat Soderquist

**Last Modified Date:** 6/30/2011

**OSPI Last Modified By:**

**OSPI Last Modified Date:**

### Milestone History

**Initiated:** 6/30/2011

**Completed:** 6/30/2011

- Clicking the **Access Budget** link on the budget selector page displays the appropriate budget matrix.

**Notes:**

- The header bar displays the processing icons. The same control bar also displays at the bottom of the page.
- Click the **Back to Calculator** icon to go to the calculator page. The budget calculator provides details such as:
  - ❖ Allocation amount
  - ❖ Indirect rate & amount
  - ❖ Direct expenditure amount

Grants

 Home
  Home
  Feedback
  Logout

Puneet Arya Role: Site Administrator  
 Chehalis School District

**219 State Transitional Bilingual Instructional Program**  
 Current Form Package Status: **Under OSPI Review**

Help
Begin Review
Contact
Application
Budget
Approval
Notes

													
Calculate Matrix	Back To Calculator	Set Back to Default	Save	Completed	OSPI Review	Needs Work	Approved	Print	Delete Budget	Modified By	Modified On	Modified By	Modified On
										By Org.	By Org.	By OSPI	By OSPI
										Pat Soderquist	6/30/2011 3:55 PM		

<b>ESD:</b> Educational Service District 113	<b>CoDistID:</b> 21302	<b>Organization:</b> Chehalis School District	<b>Grant Number:</b>
<b>Form Package Name:</b> 219 State Transitional Bilingual Instructional Program	<b>Program Number:</b> 65	<b>Revenue Account Number:</b> 4165	<b>Sub Program Number:</b>
			<b>Fiscal Period:</b> 11-12
			<b>Beginning:</b> 9/1/2011
			<b>Ending:</b> 8/31/2012
<b>Fiscal Officer:</b> Heather Pinkerton 360-807-7200	<b>Budget Contact Name:</b> Heather Pinkerton	<b>Budget Contact Phone:</b> 360-807-7200	<b>Category:</b> 2011-12 Funding
			<b>Budget Type:</b> Original

		Object of Expenditure								
Activity	Total	Debit Transfer 0	Credit Transfer 1	Salaries-Certificated 2	Salaries-Classified 3	Benefits & Payroll Taxes 4	Supplier Instr. Resources & Non-Capitalized 5	Purchased Services 7	Travel 8	Capital Outlay 9
15 Public Relations	\$0		XXXX							
21 Superv. - Instruction	\$0		XXXX							
22 Learning Resources	\$0		XXXX							
23 Principal's Office	\$0		XXXX							
24 Guid. & Counseling	\$0		XXXX							

9. The icons in the header bar are used to change the budget status.

**Notes:**

- 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 **green** icon changes the budget status to **Approved**.

The screenshot shows the '219 State Transitional Bilingual Instructional Program' interface. At the top, the current form package status is 'Under OSPI Review'. A navigation bar contains buttons for Help, Begin Review, Contact, Application, Budget (highlighted in red), Approval, and Notes. Below this, a toolbar includes icons for Calculate, Back To Calculator, Save, Completed, OSPI Review, Needs Work, Approved, Print, and Delete Budget. A table lists modification history with columns for 'Modified By' and 'Modified On'. The main content area displays program details such as ESD (Educational Service District 113), Collected ID (21302), and Organization (Chehalis School District). It also shows Form Package Name, Program Number (65), Revenue Account Number (4165), and Fiscal Period (11-12). A table for 'Object of Expenditure' is visible, with columns for Activity, Total, Debit Transfer, Credit Transfer, Salaries-Certificated, Salaries-Classified, Benefits & Payroll Taxes, Supplies Instr. Resources, Purchased Services, Travel, and Capital Outlay. Activities listed include Public Relations, Superv.-Instruction, Learning Resources, and Principal's Office.

10. Clicking the **Approval** tab displays the approval options.

**Notes:**

- Select the appropriate option. Click the **go** button to bring up the email to send to the organization.

This screenshot shows the 'Approval' tab selected in the Grants application. The interface title is 'Test Web Server' and 'Grants'. The current form package status remains 'Under OSPI Review'. The 'Approval Options' section is active, displaying a list of actions with 'go' buttons: 'Set Status Back To Under OSPI Review', 'Issue Pending Approval Email', 'Issue Needs More work Notification Email', and 'Issue Hold on Funds (Until Corrective Actions Resolved) Notification Email'. The footer contains links for Privacy Policy, Disclaimer, Customer Support (1.800.725.4311), and Copyright information (2004 - 2007).

- Clicking **Explain this?** on the approval options page displays the approval help option page which describes the various approval options.

**Print**

**Selecting From The Approval Options-Help**

Below you will find definitions for using the OSPI approval options listed under the Approval button. The approval button is viewed only by OSPI iGrants personnel for use in approving an iGrants form package.

<p><b>Set Status Back To Under OSPI Review:</b></p>	<p>The decision to change the status from Needs More Work to Under OSPI Review may occur during your review. This option is there just in case.</p> <p><b>What To Do?</b> Press the go button to change the form package status from Needs More Work to Under OSPI Review.</p>
<p><b>Issue Substantially Approved Email:</b></p>	<p>Issued mostly by federal programs, this email is sent to the organization fiscal officer, federal projects director and program contact. This email message states that the form package contents such as the application and budget are substantially approvable; however, additional review and processing needs to take place.</p> <p><b>What To Do?</b> Review the overall contents to see if the contact page, application and budget have been submitted correctly. Next, (optional) issue this email by pressing the go button to inform the organization their submission is substantially approvable.</p>
<p><b>Issue Unfunded (Competitive Grant) Notification Email:</b></p>	<p>Issued <b>ONLY</b> for competitive grants, this email thanks the organization for their request for proposal submission and notifies them that their submission was unsuccessful.</p>

- To **change the status** of a form package to **Needs More Work** or **Final Approved**, you must select and send the appropriate email listed under the **Approval** tab.

**Notes:**

- The **Final Approval email** will not appear on the list of approval options until all form package pages and the budget are approved.

**Test Web Server** | **iGrants** | Home | Home | Feedback | Logout

Puneet Arya Role: Site Administrator  
Cheshale School District

Fiscal Period: 11-12 | 219 State Transitional Bilingual Instructional Program | Current Form Package Status: **Under OSPI Review**

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

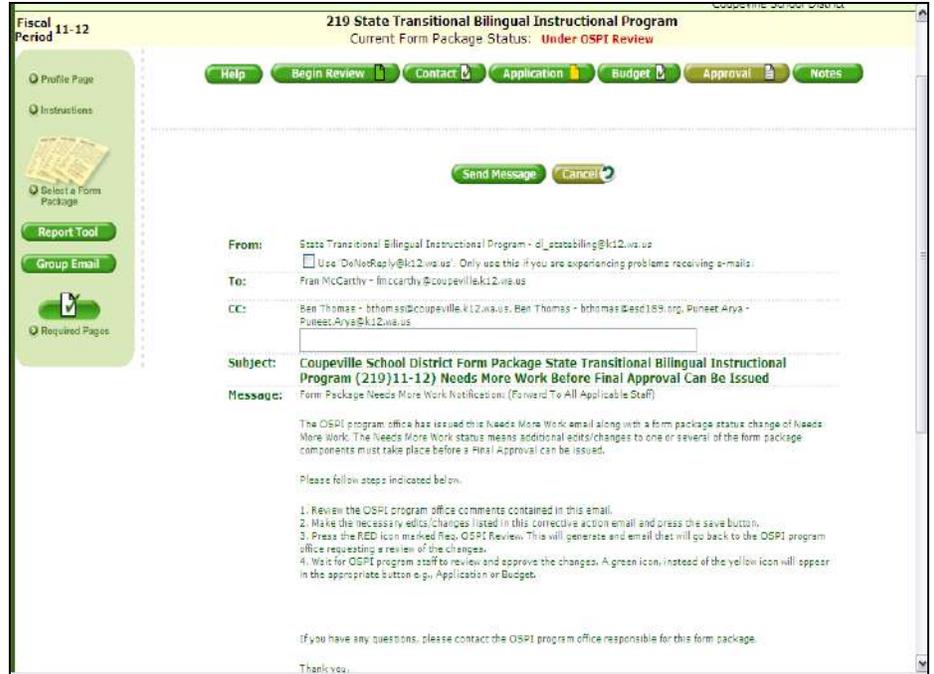
**Approval Options** **Explain this?**

- Set Status Back To Under OSPI Review
- Issue Pending Approval Email
- Issue Needs More Work Notification Email
- Issue Hold on Funds (Unbl Corrective Actions Resolved) Notification Email

Profile Page | Instructions | Select a Form Package | Report Tool | Group Email | Required Pages

Privacy Policy | Disclaimer | Customer Support: 1.800.725.4311 | ©Copyright 2004 - 2007

- Click the  button to issue **Needs More Work** email.
- When you attempt to send the Needs More Work email, the system will automatically display a **message prompt**. This is to remind you to make sure all the pertinent pages and/or budget have first been assigned the status of Needs More Work. (If you do not complete this step, the organization will not be able to make the changes as requested.)
- Enter message in the **Comments** section and click the **Send Message** button.



12. Clicking the  button next to **Issue Pending Approval Email** displays the email to send.

**Notes:**

- Enter message in the **Comments** section and click the **Send Message** button,
- or
- Click the **Cancel** button to go back to the approval options page.



13. Clicking the  button next to **Issue Hold on Funds** displays the email to send.

**Notes:**

- Enter message in the **Comments** section and click the **Send Message** button, or
- Click the **Cancel** button to go back to the approval options page.



14. Clicking the **Notes** tab displays the email history between OSPI program staff and organization users. All system-generated emails are recorded in Notes. This page can also be used to write anecdotal notes.

**Notes:**

- To **add notes**, enter the message in the empty field and click Add. The system will automatically add your name and date of the manual entry.
- If for some reason you need to **edit or delete a note**, contact the iGrants administrator for assistance.



## 4. Approve Form Package

Once the review process is completed, form packages are approved by program staff. The form package status is changed from **Under OSPI Review** to **Approved**.

1. To approve a form package, all application pages and the budget must first be approved and display green icons. (The Contact tab icon will always remain white but must display a check mark to indicate completion.)

**Test Web Server** | **Grants** | Home | Home | Feedback

Puneet Arya, Role: Site Admin  
Zillah School District

Fiscal Period: 11-12

**219 State Transitional Bilingual Instructional Program**  
Current Form Package Status: **Pending Approval**

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

Previous | Page 1 - Use of Funds (Final Approval Issued) | Next

Save	Needs Work	Approved	Approve All	Print	Print All	Modified By	Modified On	Modified By	Modified On
						Cindy Gamache	5/23/2011 9:48 AM	Puneet Arya	5/24/2011 5:39 PM

Page 1

**Use of Funds**  
TBIP Funds CANNOT be combined with other funds in Title I schoolwides.

**Estimated Count**

Estimated TBIP Allocation: **\$127,464**

For more information on the allocation calculation, please refer to the [Categorical Calculation Model](#).

2. Once all the application pages and budget are approved, the **final approval email option** on the Approval tab becomes available.

### Note:

- Click the  button next to bring up the **Issue Final Approval Notification Email**.

**Test Web Server** | **Grants** | Home | Home | Feedback

Puneet Arya, Role: Site Admin  
Zillah School District

Fiscal Period: 11-12

**219 State Transitional Bilingual Instructional Program**  
Current Form Package Status: **Pending Approval**

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

Approval Options Explain this

- Set Status Back To Under OSPI Review
- Issue Pending Approval Email
- Issue Needs More Work Notification Email
- Issue Hold on Funds (Until Corrective Actions Resolved) Notification Email
- Issue Final Approval Notification Email

Privacy Policy | Disclaimer | Customer Support: 1.800.725.4311 | © Copyright 2004 - 2007

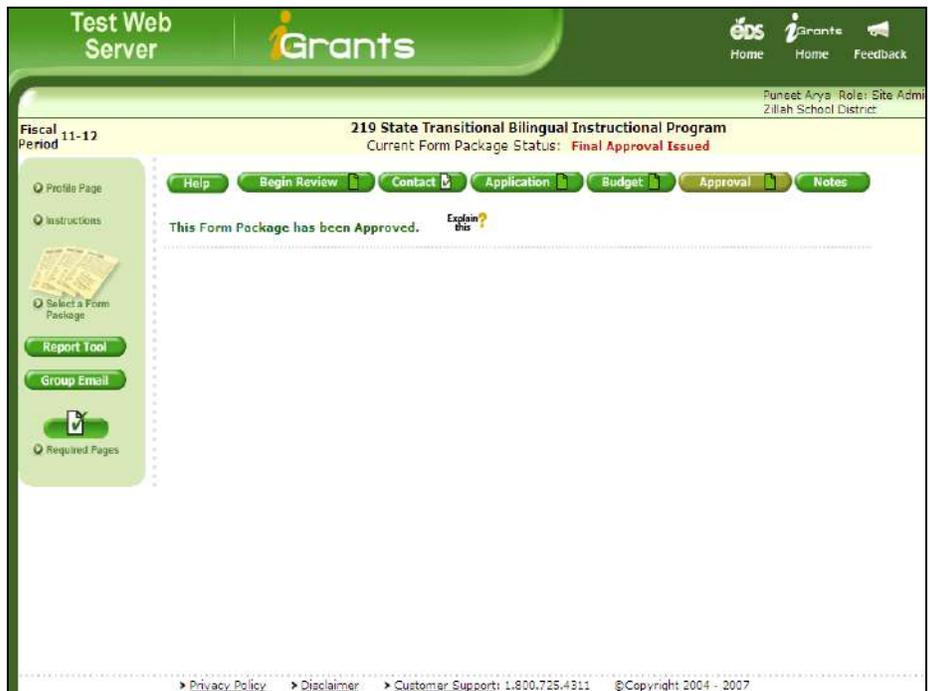
- Clicking the  button displays the final approval email page

**Notes:**

- Enter your message in the **Comments** section and click the **Send Message** button.



- Once the Final Approval email has been sent, the page refreshes to display the **final approval confirmation message**.



## 5. Group Email

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

1. To send group emails, click the **Group Email** button on the left-hand navigation bar.

### Notes:

- Select organization recipients and click the **Add** button. The page refreshes to display selected districts/ESDs.
- 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.

### Notes:

- Enter recipient address in **CC**, if applicable, as well as the **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.

## 6. Report Tool

The Report Tool is used to generate reports. Using the Report Tool, you can view, print, and generate reports as Excel output.

1. Click on the **Report Tool button** in the left-hand navigation bar to access the Report Tool.
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 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.

The screenshot shows the 'Form Package Status' report selector page. At the top, there is a navigation bar with 'Test Web Server' and 'Grants' logos, and user information for Puneet Arya. A left-hand navigation bar contains 'Select a Form Package', 'Report Tool', and 'Group Email'. The main content area has tabs for 'Help', 'Form Package Status', 'Form Package Data', 'My Saved Reports', and 'Other Miscellaneous Reports'. The 'Form Package Status' tab is active, displaying a 'Report Selector (Form Package Status Report)' form. The form includes fields for 'Report Type' (Form Package), 'Form Package ID' (219), 'Form Package Name', 'Form Package' (All), 'Organization Type' (School District), 'Organization' (All), 'Organization Name', 'Form Package Milestone' (All), and 'Budget Package Milestone' (All). There is a 'Search' button and a 'Show/Hide Detail Columns' checkbox.

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.
- 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 for each report.)
- Enter report name and click **Save** to save the report.
- Click  to view report.

The screenshot shows the 'Form Package Data' report selector page. It features the same navigation and user information as the previous screenshot. The 'Form Package Data' tab is active, displaying a 'Reporter Selector (Form Package Data)' form. The form includes fields for 'Form Package' (426 - 21st CCLC Cohort 6 (Continuing Awards - District)), 'Form Page' (Page 1 - Assurances Page Number 1), and a 'Save Report To My Reports' checkbox. A 'My Report Name' field is present. Below the form, there are options to 'Select Any or All Columns Below' with 'Select All' and 'Select None' buttons, and a 'Save' button. A 'go' button is located at the bottom right of the form area.

- Click the **Export to Excel** button to export the report in Excel format.

**Reporter Selector (Form Package Data)**

Form Package: 426 - 21st CCLC Cohort 6 (Continuing Awards - District)

Form Page: Page 1 - Assurances Page Number 1

Save Report To My Reports:  The more data that is expected to return, the longer the report will take to generate. If the desired report is expected to be lengthy and it is not necessary to return every column in the report, check the Save Check box to the left select the desired columns, and click on the Save button instead of the Go button. This will shorten the time to generate the report.

**Export To Excel** Explain this?

ESD	District	CoDistID	School	Organization	BuildingNumber	NameOfProject	AssuranceRep	AssuranceTitle	AssuranceDate
Puget Sound Educational Service District 121				Puget Sound Educational Service District 121		Tacoma IMPACT	Elizabeth Frausto	Director	08/25/2011
Educational Service District 123				Educational Service District 123		ESD123 Cohort 6 One Vision Partnership	Bruce Hawkins	ESD 123 Superintendent	08/30/11
Olympic Educational Service District 114	Cape Flattery School District	05401		Cape Flattery School District		REACH-Reach, Exceed, Achieve, Challenge, Make it Happen	Kandy Ritter	Superintendent	08/16/2011
Educational Service District 101	Deer Park School District	32414		Deer Park School District		Stepping Stone	Travis Hanson	Director of Curriculum and Technology	9/24/11

- If you didn't export the report to Excel when you run the report, 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.
- Click the **Export to Excel** button to export the report in Excel format.
- Click the **Print** icon to print the page.

**Reporter Selector (My Saved Reports)**

To create a new My Report, use the Form Package Tab

Report Name: Test 1

**Export To Excel** Explain this?

ESD	District	CoDistID	School	Organization	BuildingNumber	NameOfProject	AssuranceRep	AssuranceTitle	AssuranceDate
Puget Sound Educational Service District 121				Puget Sound Educational Service District 121		Tacoma IMPACT	Elizabeth Frausto	Director	08/25/2011
Educational Service District 123				Educational Service District 123		ESD123 Cohort 6 One Vision Partnership	Bruce Hawkins	ESD 123 Superintendent	08/30/11
Olympic Educational Service District 114	Cape Flattery School District	05401		Cape Flattery School District		REACH-Reach, Exceed, Achieve, Challenge, Make it Happen	Kandy Ritter	Superintendent	08/16/2011
Educational Service District 101	Deer Park School District	32414		Deer Park School District		Stepping Stone	Travis Hanson	Director of Curriculum and Technology	9/24/11

- Clicking the **Export to Excel** button displays the dialog box to **Open** or **Save** the report in Excel format.



- Clicking the **Other Miscellaneous Reports** tab lists other pre-designed reports.

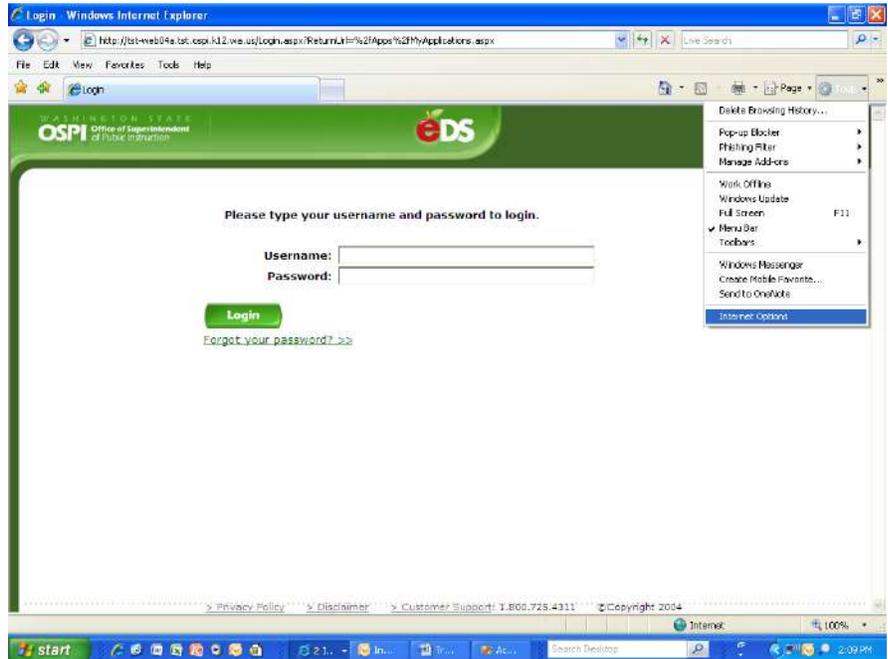
**Notes:**

- Select the report and click the **go** button.
- Follow the steps listed above for exporting to Excel.

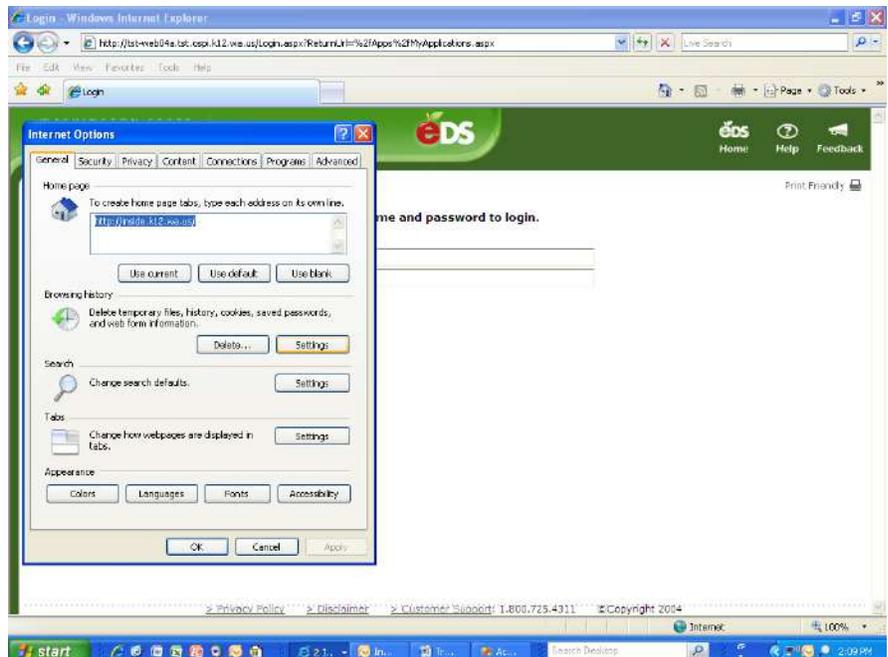


## Appendix A – Adjusting the Browser Settings

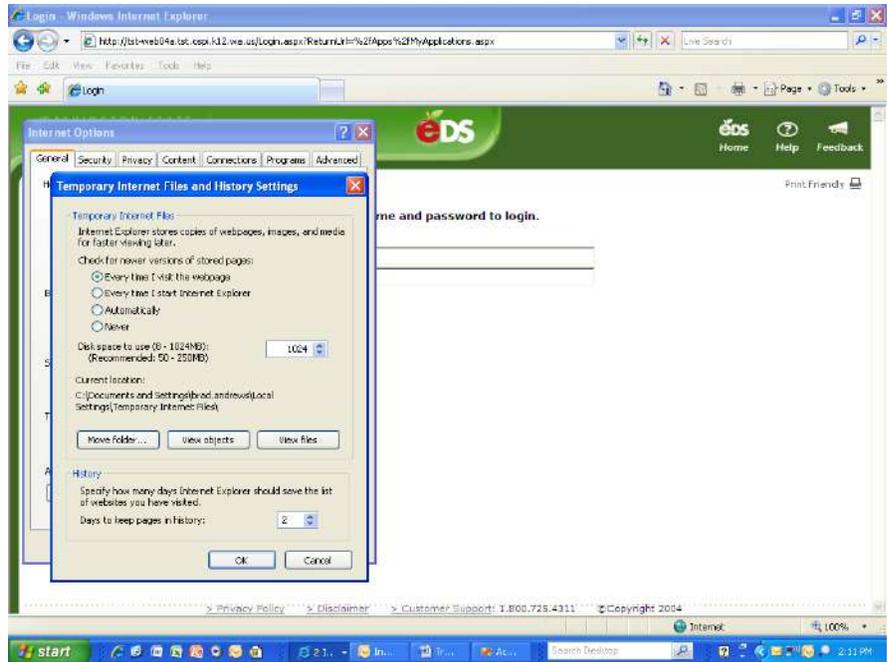
1. To ensure that screens and reports display correctly, use **Internet Explorer (IE)** as your Web browser. If necessary, you may need to adjust the browser settings for IE. In the top right-hand corner of the browser window, click on **Tools**. In the drop-down list that displays, select **Internet Options**.



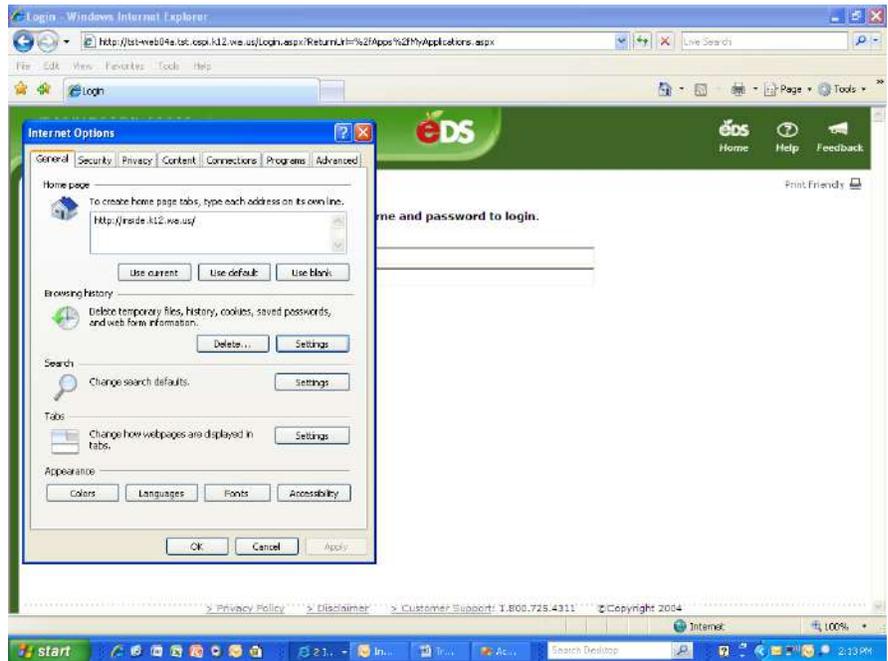
2. A window will display with Internet Options. On the **General** tab, under the heading **Browsing history**, click the **Settings** button.



- Another window will display with Temporary Internet Files and History Settings. Under the heading **Temporary Internet Files**, select the first radio button that says **Every time I visit the webpage**. Click OK.



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



## Appendix B – Track Changes

### Purpose

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

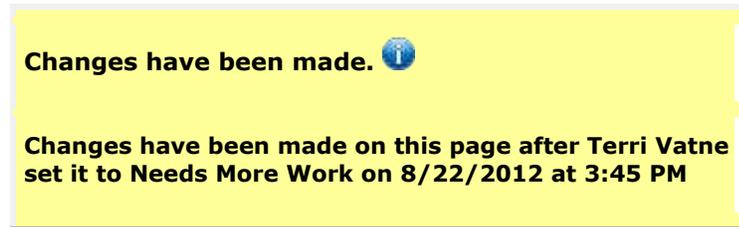
For example, when form package data is copied over from a previous fiscal period, snapshots are taken of every page in the form package. Any changes made prior to submission will be displayed as explained in the examples below.

**Event:** A school district revises values on a page which has a snapshot.

**Track Changes Response:** A banner displays at the top of the page which reads, “Changes have been made.”



Clicking the blue “i” will cause more information to display about the snapshot as illustrated below:



**Note:** 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  toggle button appears.

Clicking the  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:

<b>Female</b>	<b>Male</b>
<input type="text" value="1"/>	<input type="text" value="1"/>
<b>Hide Changes</b>	<b>Hide Changes</b>
01	01

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 Miller 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:

**Changed from No**

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

Example:

Option #1

**Changed**

**“New” Section Added:** The message “Section Added” appears. The added section is highlighted in green.

**Section Added**

<b>School Name:</b> <input type="text" value="New Section"/>	
<b>Definition of Excused Absence</b>	<input type="text"/>
<b>Total Excused Absences</b>	<input type="text"/>
<b>Definition of Unexcused Absence</b>	<input type="text"/>
<b>Total Unexcused Absences</b>	<input type="text"/>

**“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**.

**Hide Deleted Section**

<b>School Name:</b> <input type="text" value="J.M. Weatherwax High School"/>	
<b>Definition of Excused Absence</b>	<input type="text" value="Any absence with a parent/guardian excuse acceptable to school officials."/>
<b>Total Excused Absences</b>	<input type="text" value="9314"/>
<b>Definition of Unexcused Absence</b>	<input type="text" value="Any absence with or without a parent excuse that is deemed unacceptable to school"/>
<b>Total Unexcused Absences</b>	<input type="text" value="4653"/>

## **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 of a page.