INTELLIGRANTS

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

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

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

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

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

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

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

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

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

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

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

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

**SubGrantee Administrator**

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

**SubGrantee Project Director**

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

**SubGrantee Fiscal Agent**

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

**SubGrantee Staff**

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

SubGrantee Viewer
• Views Applications/Grants, Program Reports, and Fiscal Reports.

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

How to access IntelliGrants:

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

Set Up Account

There are two ways to access IntelliGrants:

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

   -OR-

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

SubGrantee Administrator Access

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

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

![Figure 1: IntelliGrants Login](image)

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

After saving the new user information, the account will be validated by a DHS IntelliGrants System Administrator. If attempting to access the system before validation, the following message will appear:
When access has been granted, an e-mail confirming the account has been validated will be received. If the account is set up as a *SubGrantee Administrator*, the user will now be able to create additional user accounts for the organization.

**Note:** Users are not able to access documents created *prior* to the date they are activated/assigned to an organization. For access to documents dated before a user’s activation date, a *SubGrantee Project Director/SubGrantee Administrator* must assign the user to each individual document using the *Add/Edit People* option located within each document. On the document’s main menu under the *Management Tools* menu, select *Management Tools*, then select *Add/Edit People*.

The preferred method for gaining access to IntelliGrants is to have the organization’s *SubGrantee Administrator* add new users to the system.

To add a staff person to an organization:
1. Select the *Organization(s)* link.
2. Select the *Organization Members* link.
3. Select the *Add Members* link.

---

**Organization - Indiana Department of Homeland Security**

Follow the instructions listed below to add/remove/modify organization members.

*Organization Information*  |  *Organization Members*  |  *Organization Documents*

**Organization Members**

Administrators with the authority to add members to your organization can follow these steps:

- To add a member to your organization, select the *Add Members* link below.
- If a member has already added his/her information in the system, you can search for the member.
- If you need to add a member’s information into the system, select *New Member*.
- For more detailed instructions, select the *Show Help* button above.

---

*Figure 3: Organization Information*
4. Enter the first/last name of the person to add and select **SEARCH**. The search results will list below filtered by the search criteria entered.

![Organization - Indiana Department of Homeland Security](image)

**Organization Members**

Administrators with the authority to add members to your organization can follow these steps:
- To add a member to your organization, select the Add Members link below.
- If a member has already added their information in the system, you can search for the member.
- If you need to add a member’s information into the system, select New Member.
- For more detailed instructions, select the Show Help button above.

**Figure 4: Member Search Results**

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

![Current Members](image)

**Figure 5: User Selection**

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

![New Member Button](image)
7. Complete the information for the new user and select **SAVE & ADD TO ORGANIZATION**.

**Figure 7: New User Information**

### Adding a new IntelliGrants user to your organization

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

To add a staff person to an organization:

**Organization - Indiana Department of Homeland Security**

Follow the instructions listed below to add/remove/modify organization members.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the <strong>My Organization(s)</strong> link.</td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Organization Members</strong> link.</td>
</tr>
</tbody>
</table>
Select the **Add Members** link.

To **ADD** a new organization member that is not currently an IntelliGrants user:

1. Select the **NEW MEMBER** button.
2. Enter the new member contact information.

**Notes:**
- All fields marked with an * are required.
- The Username field must consist of letters and/or numbers.
- The password must contain at least 1 upper case letter, at least 1 number and must be at least 8 characters long. You can include special characters in the password.
- The Password and Confirm Password entries must match.
- Select the appropriate role from the drop-down list. See "SubGrantee User Types" on page 5 for an explanation of roles. The role affects what the user can view and do in the program.

3. Select the **SAVE & ADD TO ORGANIZATION** button.
4. The SubGrantee Administrator must notify the new user of the username and password that was assigned when creating the account.
5. New users are required to change their password upon the first login.

To confirm the person has been added, select the **Current Members** link. If the person was successfully added, the new member will be listed with the rest of the organization members.

---

**Adding an existing IntelliGrants user to your organization:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the <strong>My Organization(s)</strong> link.</td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Organization Members</strong> link.</td>
</tr>
<tr>
<td>3</td>
<td>Select the <strong>Add Members</strong> link.</td>
</tr>
</tbody>
</table>

**Organization Members**

Administrators with the authority to add members:
- To add a member to your organization
- If a member has already added his/her information
- If you need to add a member's information
- For more detailed instructions, select the **Current Members** or **Add Members** links.

Enter the first/last name of the individual and click the **SEARCH** button. If the user is already in the system, you will see results of any matching names. **ADD** the organization member by doing the following:

1. Select the checkbox next to the person you want to add.
2. Select a role from the **Role** drop-down list. See "SubGrantee User Types" on page 5 for an explanation of roles. The role affects what the user can view and do within the program.
3. Select the **SAVE** button. If the new member is not part of the organization member list and does not appear in the search results, use the instructions above to add the individual to the IntelliGrants system.

4. The SubGrantee Administrator must notify the new user of the username and password that was assigned when creating the account.

5. New users are required to change their password upon the first login.

To confirm, select the **Current Members** link. If the person was successfully added, the new member will be listed with the rest of the organization members.

### Access IntelliGrants

To access the IntelliGrants site, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Type <a href="http://intelligrants.in.gov">http://intelligrants.in.gov</a> into the address bar of a web browser. You see the Login screen.</td>
</tr>
<tr>
<td>2</td>
<td>Type your username and password and select <strong>LOGIN</strong>. You see the <strong>My Home</strong> page</td>
</tr>
</tbody>
</table>
Note: IntelliGrants does not save the username and password. This option may be available with some web browsers.
Add IntelliGrants to Favorites List
To access IntelliGrants quickly, add it to the Favorites menu by following these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In Internet Explorer, open the <strong>Favorites</strong> menu from the toolbar and then select <strong>Add to Favorites.</strong></td>
</tr>
<tr>
<td>2</td>
<td>To change the default name, type the new name.</td>
</tr>
<tr>
<td>3</td>
<td>Select <strong>Add.</strong></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select <strong>Tools</strong> and the <strong>Internet Options.</strong></td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Security</strong> tab.</td>
</tr>
<tr>
<td>3</td>
<td>Select the <strong>Trusted Sites</strong> icon, then select the <strong>Sites</strong> button.</td>
</tr>
<tr>
<td>4</td>
<td>Enter <a href="http://intelligrants.in.gov">http://intelligrants.in.gov</a> in the <strong>Add this website to the zone</strong> field and select the <strong>Add</strong> button.</td>
</tr>
<tr>
<td>5</td>
<td>Select the <strong>Close</strong> button, then select <strong>OK.</strong></td>
</tr>
</tbody>
</table>

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

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

To update your profile, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Go to the <strong>My Home page in IntelliGrants.</strong></td>
</tr>
<tr>
<td>2</td>
<td>Click the <strong>My Profile</strong> link.</td>
</tr>
<tr>
<td>3</td>
<td>Make any changes to update the information.</td>
</tr>
</tbody>
</table>
Update Organization Information
You should update the system with the organization’s most current and accurate information.

Follow these steps:

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the <strong>My Organization(s)</strong> link and then select the organization to update.</td>
</tr>
</tbody>
</table>
2. Select the **Organization Information** link.

Please complete all the required fields below. Required fields are marked with an *.

**Organization Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Test Organization *</td>
</tr>
<tr>
<td>Legal Name</td>
<td>Test *</td>
</tr>
<tr>
<td>FEIN</td>
<td>123456789 *</td>
</tr>
<tr>
<td>DUNS #</td>
<td>11-222-3333 *</td>
</tr>
<tr>
<td>PeopleSoft ID (PSID)</td>
<td>0000235267</td>
</tr>
<tr>
<td>Address</td>
<td>555 Testing Street</td>
</tr>
<tr>
<td>City</td>
<td>Test City *</td>
</tr>
<tr>
<td>State</td>
<td>Indiana *</td>
</tr>
<tr>
<td>Zip code</td>
<td>55555 *</td>
</tr>
<tr>
<td>County</td>
<td>*</td>
</tr>
<tr>
<td>Phone</td>
<td>(555) 555-5555 *</td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td></td>
</tr>
</tbody>
</table>

3. Make any changes.

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

4. Select **SAVE** in the top right to save the organization information.
Deactivating a User
A SubGrantee Administrator can deactivate a member of his/her organization. A deactivated user cannot access or edit proposal-related information.

To deactivate a user:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the <strong>My Organization(s)</strong> link.</td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Organization Members</strong> link.</td>
</tr>
</tbody>
</table>
| 3    | Using the drop-down calendar, set the second Active Dates field to the date on which the user will no longer have access. Select **SAVE**.

![Image showing the deactivation process](image-url)
NAVIGATE INTELLIGRANTS

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

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

The following guidelines describe how to navigate through IntelliGrants:

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

![Image of IntelliGrants interface]

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

![Image of My Tasks section]

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

<table>
<thead>
<tr>
<th>Info</th>
<th>Document Type</th>
<th>Organization</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019 Edward Byrne Memorial Justice</td>
<td>Assistance Grant Program (JAG)</td>
<td>IDHS Test Organization</td>
<td>JAG-2019-00003</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>EMPGC-2019-IDHS Test Organization-00017</td>
</tr>
</tbody>
</table>
OPEN A DOCUMENT

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

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

My Applications/Grants
Use the search functionality below to find a specific Application/Grant.

Search Applications/Grants

<table>
<thead>
<tr>
<th>Application/Grant Types</th>
<th>-- Select --</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application/Grant Name</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Year</td>
<td></td>
</tr>
</tbody>
</table>

[SEARCH] [CLEAR]
Search for a Document

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the type of document to search. For example, to search for applications, select <strong>My Applications/Grants</strong>.</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="My Home My Applications/Grants My Program Reports My Fiscal Reports" /></td>
</tr>
</tbody>
</table>
| 2    | Do any of the following:  
|      | Display the **Application/Grant Types** drop-down list and select the type of application/grant.  
|      | Type the first few characters or the complete application/grant name in the **Application/Grant Name** field.  
|      | Display the **Status** drop-down list and select the status of the document. For example, select **Application in Process**. |
|      | ![My Applications/Grants](image) |
|      | **Search Applications/Grants**  
|      | Use the search functionality below to find a specific Application/Grant.  
|      | ![Search Applications/Grants](image) |
|      | Enter the year for the application/grant in the **Year** field. |
| 3    | Select the **SEARCH** button. |
|      | ![Search Results](image) |
|      | You will see any matching documents in the search results. You select the link in the **Name** column to open the document. |
HANDLE EMAIL MESSAGES

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

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

View Your Email Messages

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

Follow these steps to view your email messages:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the My Inbox section, click the OPEN MY INBOX button.</td>
</tr>
</tbody>
</table>

![My Inbox](image1)

You have 0 new messages.
Select the Open My Inbox button below to open your system message inbox.

![Open My Inbox](image2)

2    | Do any of the following to display your messages: |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Display the Sort my inbox messages by drop-down list, select a sort order, and click the GO button to view a sorted list of messages. You can sort by priority, sender, subject, or date/time.</td>
</tr>
<tr>
<td></td>
<td>• To view the messages, select View All My System Messages.</td>
</tr>
<tr>
<td></td>
<td>• To view a message, select the link in the Subject column.</td>
</tr>
</tbody>
</table>

![My Inbox](image3)

Sort my inbox messages by [Select --]
Priority
Sender
Subject
Date/Time

![My Inbox](image4)

View All My System Messages
Sender
Note: You can mark a message as read or archive a message. To do so, select the checkbox next to the message and then select MARK CHECKED AS READ or MARK CHECKED AS ARCHIVED.

3. After reviewing the message, do any of the following:

- Close the message by selecting CLOSE in the bottom left corner of the message.
- Select the ARCHIVE button to archive the message.
- Select the Sender name to reply to the message.

Search for Email Messages
To search for a message, follow these steps:
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select View All My System Messages.</td>
</tr>
<tr>
<td>2</td>
<td>Enter a keyword of the message, included in either the subject or the contents of the message in which to search and then click <strong>SEARCH</strong>.</td>
</tr>
</tbody>
</table>
COMPLETE TASKS

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the OPEN MY TASKS button.</td>
</tr>
<tr>
<td>2</td>
<td>To open a document or form to edit data, select the document name in the Name column.</td>
</tr>
</tbody>
</table>
Complete the task and **SAVE** the page in the application form

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

1. **ADDITIONAL SERVICES**
   
   1. Describe any additional programs/services/treatments/referrals available that are not supported through the current funding.
   
   2. Describe the needs of the agency that are not being met and an estimated cost to implement.
ADDITIONAL SERVICES
1. Describe any additional services not supported by grant funding:
   - [Details]

Possible Statuses
APPLYICATION SUBMITTED
- SUBMIT APPLICATION

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

### Initiate an Application

To initiate an application, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select <strong>My Home</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>Select <strong>VIEW OPPORTUNITIES</strong> in the <strong>View Available Proposals</strong> section.</td>
</tr>
</tbody>
</table>
| 3    | Filter the list of available opportunities by doing any of the following:  
|      | • To filter by a provider, display the **Provider** drop-down list and select the provider.  
|      | • To filter by due dates, enter the beginning and end date for opportunities from the **Due Date** fields. |
| 4    | Select the **FILTER** button. |

You see the results of your search.
To initiate a proposal, select **Apply Now** for the proposal.

- Selecting **Not Interested** below an opportunity will hide the opportunity from the **My Opportunities** section.
- Selecting **Reset My Opportunities** will allow any previously hidden opportunities to reappear in the **My Opportunities** section.

An agreement page will appear once an application has been initiated.
Select **I AGREE** to apply for the application.
When you initiate a new application it is added to your My Tasks section on the My Home page. You can select OPEN MY TASKS to begin work on the document.

Note: See Complete Forms for information on completing the forms and changing the status of an application.

Work on an In-Process Application
If you log out of IntelliGrants, you can return later to continue to work on an application.

To do so, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select My Home.</td>
</tr>
<tr>
<td>2</td>
<td>Select the OPEN MY TASKS button to display a list of active applications.</td>
</tr>
</tbody>
</table>
Select the link for the application.

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

<table>
<thead>
<tr>
<th>Info</th>
<th>Document Type</th>
<th>Organization</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Application</td>
<td>IDHS Test Organization</td>
<td>EMPGC-2019-IDHS Test Organization: 00017</td>
</tr>
<tr>
<td></td>
<td>Application</td>
<td>IDHS Test Organization</td>
<td>IHSFG-2020-Grant County Foundation Grant: 00057</td>
</tr>
</tbody>
</table>
COMPLETE FORMS

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

Open a Form and Enter Data

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Hover over the <strong>Forms Menu</strong> button to view a list of forms.</td>
</tr>
<tr>
<td>2</td>
<td>Select the link for the page to complete.</td>
</tr>
<tr>
<td>3</td>
<td>Enter the data, using Tab to move from field to field.</td>
</tr>
</tbody>
</table>
Select **SAVE** in the top right to save the form. A **Page Information** message will appear when the page has been successfully saved.

---

**Management Tools**

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select the Management Tools</td>
</tr>
<tr>
<td>2</td>
<td>This will return a list of Management tools</td>
</tr>
</tbody>
</table>
Management Tools

- **CREATE FULL PRINT VERSION**
  Select the link above to create a printable version of the document.

- **CREATE FULL BLANK PRINT VERSION**
  Select the link above to create a blank printable version of the document.

- **ADD/EDIT PEOPLE**
  Select the link above to perform actions such as adding people, changing security, altering active dates, etc.

- **STATUS HISTORY**
  Select the link above to view the status history of this document.

- **CHECK FOR ERRORS**
  Select the link above to check the entire document for errors.

- **VIEW MODIFICATION HISTORY**
  Select the link above to view various modifications that people have made to this document.

- **ATTACHMENT REPOSITORY**
  Select the link above to view all attachments in this document.

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

Document Information: APP-2019-IDHS Test Org

Information populated on this page is derived from other pages that will be available in the future.

"Describe why travel and/or training is necessary for the project." is required.

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

- **VIEW MODIFICATION HISTORY** is used to view modifications people have made to specific pages in the document. SubGrantee users can select from a list of modified application pages to be taken to that specific page. They can then select the 📝 icon next to an individual field to view the previous value for that field.

- **ATTACHMENT REPOSITORY** is used to view all attachments within the document. The SubGrantee Administrator can view all attachments within an application or grant. To do so, click Management Tools and then click ATTACHMENT REPOSITORY. The document’s attachments will be listed with the Form Name that the Attachment will be found on. To update the attachment, go to the attachment’s form to make the changes that need to be made.

When entering data, keep these guidelines in mind:

- When the icon is a pencil 📝, that indicates the page has been saved at least once and is being edited or is complete.

- When the icon is a green checkmark ✅, that indicates the page is marked as complete.

- Be careful when copying and pasting information from another program (for example, Microsoft Word) to an IntelliGrants form. IntelliGrants does not recognize some characters and formatting, such as tables, graphs, photographs, bullets, and some tabs. Try copying and pasting the text into Notepad first and then into IntelliGrants to avoid problems.

- If you copy and paste text that is too long for the set character limits for that field, you see an error message. Edit the text so that it is within the required character limits.

- When possible, IntelliGrants automatically calculates totals and other numbers. When information is entered on the page, the system takes the values that were entered, calculates, and displays them.

- When a form is saved but the required fields are not completed or you have broken any data validation rules for any of the fields, you see an error message at the top of the page. You can correct the error do so later. Note that before you submit the application, you must correct all errors.
You can upload attachments, such as an Excel spreadsheet for a budget. You can upload these file types: bmp, doc, docx, gif, jpg, pdf, png, ppt, tif, txt, wpd, xls, xlsx.

**Cautions:**

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If an attachment is required or optional on a page, the file upload will appear on the page. To upload a file, click the <strong>Browse</strong> button.</td>
</tr>
<tr>
<td>2</td>
<td>Navigate to the folder that contains the file, select the file to upload, and click the <strong>Open</strong> button.</td>
</tr>
<tr>
<td>3</td>
<td>Once the document is uploaded to the page, click <strong>SAVE</strong>.</td>
</tr>
</tbody>
</table>
Tip: You can view attachments within a document using the Attachment Repository tool.

**Management Tools**

- **STATUS HISTORY**
  Select the link above to view the status history of this document.

- **CHECK FOR ERRORS**
  Select the link above to check the entire document for errors.

- **ATTACHMENT REPOSITORY**
  Select the link above to view attachments in this document.

**Application Menu - Attachment Repository**

Click the View link to open the attachment.

<table>
<thead>
<tr>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form Name</strong></td>
</tr>
<tr>
<td>Attachments</td>
</tr>
</tbody>
</table>
Print a PDF
You can create a PDF of an application to print or save before submitting.

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

To print an application, follow these steps:

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

Create a Printable Version or Full Blank Application for Printing
A SubGrantee Administrator can use the Management Tools to print by following these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select Management Tools. You see a list of the different Management Tools you can use for documents (and users).</td>
</tr>
</tbody>
</table>
Management Tools

CREATE FULL PRINT VERSION
Select the link above to create a printable version of the document.

CREATE FULL BLANK PRINT VERSION
Select the link above to create a blank printable version of the document.

ADD/EDIT PEOPLE
Select the link above to perform actions such as adding people, changing roles, and removing people.

STATUS HISTORY
Select the link above to view the status history of this document.

CHECK FOR ERRORS
Select the link above to check the entire document for errors.

VIEW MODIFICATION HISTORY
Select the link above to view various modifications that people have made to the document.

ATTACHMENT REPOSITORY
Select the link above to view all attachments in this document.

2 Select CREATE FULL PRINT VERSION to create a printable version of the application. You might do this to review the printed version and verify. Or you may want a paper copy to save.

OR

Select CREATE FULL BLANK PRINT VERSION to print a blank version of the full application. You might use the blank application as an example to include so that another user knows what information is needed to complete the application.

3 Select either print option. Open or save the PDF to print with Adobe Acrobat Reader.

Check an Application for Errors

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select Management Tools.</td>
</tr>
</tbody>
</table>
| 2    | Select CHECK FOR ERRORS.  
You see the results of the error check. |
| 3    | Use the links to review the flagged errors and then make any changes. |

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

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

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

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

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

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

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

To complete a Program Report, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigate to your application/grant document.</td>
</tr>
<tr>
<td>2</td>
<td>Hover over the Related Documents and Messages link and select the link for the Program Report for the current quarter. Existing Program Reports can be accessed in this menu, or by using the My Program Reports search tab found at the top of the screen.</td>
</tr>
<tr>
<td>3</td>
<td>Note the new document identifier created for your Program Report.</td>
</tr>
</tbody>
</table>
Complete each form in the Program Report. When finished with a form, use the SAVE or SAVE/NEXT buttons at the top of the form to record your progress.

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

Also note the Milestone Status selections on this form. Any milestones marked “Completed” will automatically be marked “Completed” on subsequent Program Reports. Milestones marked “Not Met” or “In Progress” will not have their status carried over.
When all forms have been completed and no errors remain on the document, submit your Program Report by hovering over the **Status Changes** menu and selecting **Submit** under **Program Report Submitted for Review**.

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

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

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

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

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

To complete a Fiscal Report, follow these steps:

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

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

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

**TRAVEL**

Instructions:
- All required fields are marked with an *.
- Use the SAGE feature to save information and calculate data on each page.
- Enter at least 30 minutes to avoid timing delays.
- To proceed to the next page, see the instructions listed on the top of the page.
- Please refer to the applicable forms for additional instructions.

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

**Purposes of Travel/Organization**

<table>
<thead>
<tr>
<th>Is this for a conference?</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Conference</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Start Date of Trip       | 3/30/2020 |
| End Date of Trip         | 3/31/2020 |

<table>
<thead>
<tr>
<th>Location of Trip</th>
<th>Chicago</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Total Number of Travelers</th>
<th>1</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name of Traveler</th>
<th>John Smith</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Travel Expense</th>
<th>Total Costs</th>
<th>Grand Costs</th>
<th>Remaining Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lodging</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$500.00</td>
</tr>
<tr>
<td>(Other please specify)</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

<table>
<thead>
<tr>
<th>Budget Categories</th>
<th>Fund Type</th>
<th>Grant Costs</th>
<th>Grant Funds Requested to Date</th>
<th>Grant Funds Requested this Period</th>
<th>Grant Funds Remaining Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHEP Budget Categories</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning Costs</td>
<td>Grant</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Organization Costs</td>
<td>Grant</td>
<td>$2,000.00</td>
<td>$0</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Equipment Costs</td>
<td>Grant</td>
<td>$2,000.00</td>
<td>$0</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Training Costs</td>
<td>Grant</td>
<td>$3,000.00</td>
<td>$0</td>
<td>$1,500.00</td>
<td>$1,500.00</td>
</tr>
<tr>
<td>Exercise Costs</td>
<td>Grant</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>SHEP Grand Total Costs</td>
<td>Grant</td>
<td>$7,000.00</td>
<td>$0</td>
<td>$3,500.00</td>
<td>$3,500.00</td>
</tr>
</tbody>
</table>

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

*Note*: If the current quarter’s Program Report was marked final, this Fiscal Report must be marked final as well.
*Note: If you have a remaining balance on your final Fiscal Report you must select checkbox to deobligate the remaining balance, as seen in the screenshot above. If deobligating funds, after your Final Fiscal Report has reached the status: Final Fiscal Report Paid, you must file a Grant Adjustment Notice (GAN) Request.

The Fiscal Report and Reimbursement Claim Form must be signed by both the Subgrantee Administrator and Subgrantee Project Director for your organization. When the appropriate user is logged in, select the checkbox next to the Signature field and SAVE the page. Your name and the date will be populated automatically.

If you are requesting reimbursement for Equipment items in this Fiscal Report, an Inventory Report form will be generated. This form can be found at the bottom of the Forms Menu after items are claimed on the Equipment form.
Complete the Inventory Report form and have both the SubGrantee Administrator and the SubGrantee Project Director complete the required electronic signatures on this page. These fields function in the same way as the signature fields required in step 8.

By signing below, I certify that I have reviewed and validated the information in this document. I attest to the accuracy of the information in this document and I certify that it accurately represents the actual costs expended during the reporting period.

☐ Subgrantee Administrator*
Signature:________________________
Title:________________________
Date Signed:________________________

☐ Subgrantee Project Director*
Signature:________________________
Title:________________________
Date Signed:________________________

When all forms have been completed and no errors remain on the document, submit your Fiscal Report by hovering over the Status Changes menu and selecting Apply Status under Fiscal Report Submitted.
On the next screen, enter any notes you would like to submit along with your document, and select I Agree to complete your submission.

*Note: Any notes provided on the status change will appear in the document’s status history. The status history can be accessed using the Management Tools on the document. Please see page 33 for reference for Management Tool use.
Grant Adjustment Notice Requests are used to make modifications to grant documents that have already been executed. In order to initiate a Grant Adjustment Notice Request, the application/grant document must be in the status: Agreement Executed, and the Quarter 1 Program Report and Fiscal Reports must be completed and approved. If any Program or Fiscal Reports have been started for subsequent quarters, these documents must also be completed and approved before initiating a Grant Adjustment Notice Request.

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

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

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

On the next screen, enter any notes you would like to submit along with the status change, and select I Agree.
*Note: Any notes provided on the status change will appear in the document’s status history. The status history can be accessed using the Management Tools on the document. Please see page 33 for reference for Management Tool use.

Select the Grant Adjustment Notice Request form located at the bottom of the Forms Menu.

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

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

For example, budget modifications for SHSP grants will need to include the POETE Overview form and (in many cases) the SHSP Project Scope form. If the POETE Overview form is to be modified during a GAN, this must be modified first before modifying any other budget pages. Once this overview form is modified, then you may adjust the remaining budget forms. Be sure to review your application forms before submitting a Grant Adjustment Notice Request to determine all forms that will need to be modified.
After making your selections, be sure to fill out all required fields on the page and select **SAVE**. Make the appropriate corrections based on any page errors that appear and **SAVE** again.

Hover over the **Status Changes** menu link and select **Request Submitted** to change the document status to **Grant Adjustment Notice Request Submitted**.
<table>
<thead>
<tr>
<th>Section</th>
<th>Text</th>
</tr>
</thead>
</table>
| 7       | **IDHS will review your request. If approved, your document status will be changed to **Grant Adjustment in Process**.  
At this point, you may make modifications to the application forms that you indicated on your Grant Adjustment Notification Request form. Navigate to the appropriate forms in the **Forms Menu**, make the necessary modifications, and **SAVE** each page. Make the appropriate corrections for any page errors that appear.  
In the case of a budget modification, certain fields will not be eligible to be modified. These fields will appear gray on their budget page and will be disabled from editing. New budget lines may be filled out to request funding for items that no longer match the description of the disabled fields. Remember to decrease the requested grant amount for any items that no longer apply. **Do not adjust spending in areas that were not pre-approved by IDHS, and do not add additional funding above your approved Grant Amount.**  
An error will fire on submission of your Grant Adjustment if any row on any budget page is reduced to an amount less than what has already been expended. It is recommended that you reference the most recent Fiscal Report for the grant when completing your Grant Adjustment.  
At the end of a budget modification, visit your **Budget Summary** form and verify that all requested Grant Costs amounts are correct. |
| 8       | When you have verified that all information in your document has been modified correctly, and all page errors have been cleared from your application forms, use the Status Changes menu to change the status to **Grant Adjustment Submitted.** |
On the next screen, enter any notes you would like to submit along with the status change, and select I Agree.
MANAGE USER ACCESS TO DOCUMENTS

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

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

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

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

For the second **Active Date** field, enter or select a date from the Calendar pop-up.

IDHS Test Organization (SubGrantee Administrator) SubGrantee Administrator

The user will not be able to access the document after the specified date.

| 5    | Select the SAVE button at the top right to remove the user’s access to the document. |

**Current Status** | **Period Date / Date Due** |
--- | --- |
Application in Process | N/A - N/A |
Application in Process | N/A |
Make Status Changes
A SubGrantee Administrator or SubGrantee Project Director can push a document to the next status—for instance, to submit the application—by using the **Status Changes** section.

Follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>From anywhere within the application, select the <strong>Status Changes</strong> button.</td>
</tr>
<tr>
<td><img src="image1" alt="Menu Forms Status Changes Management Tools" /></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>You see a list of possible statuses for the document. Select the status by selecting the appropriate button.</td>
</tr>
<tr>
<td><img src="image2" alt="Status Changes" /></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>After the Submit or Cancel option has been selected, an agreement will appear to confirm the status change. Select <strong>I AGREE</strong> to complete the status change.</td>
</tr>
</tbody>
</table>
Agreement
Please make a selection below to continue.

Are you sure you want to submit your application?
If you would like to include notes about this status change, please:

0 of 2000
I AGREE  I DO NOT AGREE
Once the status change has been complete, the **Forms Menu** with the completed application will appear.

### Application Menu - Forms

Please complete all required forms below.

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

<table>
<thead>
<tr>
<th>Info</th>
<th>Document Type</th>
<th>Organization</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Application</td>
<td>IDHS Test Organization</td>
<td>SubGrantee</td>
</tr>
</tbody>
</table>

**Forms**

<table>
<thead>
<tr>
<th>Status</th>
<th>Page Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>⬤</td>
<td>Contact Information</td>
</tr>
<tr>
<td>⬤</td>
<td>Project Title &amp; Funding Profile</td>
</tr>
<tr>
<td>⬤</td>
<td>Problem Statement &amp; Analysis</td>
</tr>
<tr>
<td>⬤</td>
<td>Goals, Objectives, &amp; Outcomes</td>
</tr>
<tr>
<td>⬤</td>
<td>State Homeland Security Grant (SHSP)</td>
</tr>
<tr>
<td>⬤</td>
<td>SHSP Project Scope</td>
</tr>
<tr>
<td>⬤</td>
<td>Planning, Organization, Equipment, Training, Exercise (POETE) Overview</td>
</tr>
</tbody>
</table>

After submission, the document will be assigned to be reviewed. The option to make changes to the application after it has been submitted must wait until a reviewer has sent the application back for modifications. A notification will be sent to your inbox when the review has been complete and what further information is needed.
**Note:** A SubGrantee Administrator can check the status history of a document or view the modification history by selecting **Management Tools** and then selecting **Status History** or **View Modification History**.