MONI Grant Electronic Application and Reporting System

GEARS

Applying for a *Vermont Training Program (VTP) Grant* on the ACCD Grants Management System (IntelliGrants)

PLEASE NOTE: Prior to this point, you should have contacted VTP staff, had an initial determination that your training is appropriate for an application, created a user account in the grants management system and had that account validated by VTP staff. If so, you are ready for STEP 1 below.

STEP 1: Saving Your Organization Details Page

This page contains organization information that is required to process your application.

- 1. Log on to the system: https://egrants.vermont.gov/
- 2. Click the 'Organization(s)' link on the top blue bar:

Home Grants/Incentives/ERs	Monitoring/Reporting	Requisitions/Claims/Invoices	Archive		
		Train	ing Materia	s Organization(s)	<u>Profile</u> <u>Logout</u>
					SHOW HELP

3. You will see your organization's contact information and links to Organization Members, Organization Documents and Organization Details. Click the Organization Details link:

Organizati	on - VTP Test Company
Please complete all	the required fields below. Required fields are marked with an \star .
Organization Inform	ation Organization Members Organization Documents Organization Details
Organization Infor	mation
Name	VTP Test Company
Short Name	VTPTestCo *
Address	123 Here
City	Montpelier * State Vermont • * Zipcode 05620 *
County	Washington County v
Phone	(888) 888-8888 * Fax
Email	trisha.standen@vermont.gov
Website	

4. Click on VTP Organization Details:

-	ganization Information			
Organization	n Information Organization Members Organizati	on Documents Organiza	ation Details	
Organizati	on Details			
Status	Page Name	Note	Created By	Last Modified By
	VTP Organization Details		TrishaDev Standen 4/8/2016 1:20:31 PM	Drew Lees 5/6/2016 11:39:03 AM



5. Fill in all of the required (red asterisk *) fields and click the 'SAVE' button. VTP Staff will fill in your State of Vermont Vendor Number if you do not know it, or do not have one yet:

		SAVE AL	DD NOTE	CHECK GLOBAL ERRORS
Back Document Information: OD-2014-VT Details You are here: > Organization Details f				
Organization Information Organization	Members Organization Documents Organization Details			
VTP ORGANIZATION DETAILS				
Please enter the following information and	click save.			
Federal ID:	999999999 *			
DUNS:	00000000 *			
Fiscal Year End:	Day <mark>31 ▼ </mark> ★ Month Jan ▼ ★			
RDC:	CVEDC V			
Region:	Central 🔻 \star			
Business Size: (number of permanent, full-time employees) <u>100-249</u> *			
Business Type:	C-Corp 🔻 \star			
SOV Vendor#: (VTP Staff will fill in)				
Click 'Save' before leaving page.				

STEP 2: Initiating the Application

Roles that can create a VTP application include: Administrator, Authorizing Official, Financial Officer and Senior Authorized Official.

1. Log on in a role that can create an application, if not already logged on.



2. On the home page click the button that says 'VIEW AVAILABLE GRANTS/INCENTIVES/ERs

Home Grants/Incentives/ERs	Monitoring/Reporting	Requisitions/Cla	aims/Invoic	ces Archive		
		R	Reports	Training Materials	Organization(s)	<u>Profile Loqout</u>
						SHOW HELP
Welcome Test Financial Officer Change Picture	Instructions: Select the SHOW HELP b > Applying for an Opportu > Using System Message > Understanding your Tas > Managing your awarded	nity s :ks	ailed instru	ctions on the follow	ring.	
Hello Test, please choose an option	below.					
○View Available Gra	nts/Incentives	/FRc				
You have 1 Grants/Incentives/ERs available						
Select the View Grants/Incentives/ERs but	itton below to see what is av	vailable to your org	anization.			
VIEW GRANTS/INCENTIVES/ERS						
😑 My Inbox						
You have 15 new messages. Select the Open Inbox button below to ope	n your system message inh	107				
	n your system message mb	юх.				
OPENINBOX						
🛇 My Tasks						
You have 2 new tasks.						
You have 0 tasks that are critical. Select the Open Tasks button below to vie	w your active tasks.					
OPEN TASKS						

3. Click the 'APPLY NOW' button under the VTP application offer for your organization:

O Back
Grants/Incentives/ERs
To apply for an item listed below, select the Apply Now button below each description.
VTP Business Application 2017 for Vermont Company Offered By: VTACCD
VTP Application Availability Dates: 02/17/2016-open ended
VTP Application Period: not set
VTP Application Due Date: not set
Description:
APPLY NOW



From here you have access to all of the application forms ('Forms Menu'); the ability to move the application along the application process ('Status Changes'); add or remove users from the application, see the status history, print a full PDF of the application and more ('Management Tools'); and the ability to see items related to your application, like system messages ('Related Documents and Messages').

STEP 3: Completing the Application

Requested:

Approval:

Total Amount Pending

0

1. From the breadcrumb menu at the top of the page, hover over the 'Forms Menu' link to get a popup window of the available forms, or click the link to get to the forms listing.

Men	u 🕒 Form	is Menu 📀 <u>Status Changes 💊 Management Tools 🍳 Related Documents and Messages</u>
	Forms Me	nu
🕙 <u>Ba</u>	Status	Page Name Note
Docur	General	Information
Def		Applicant Information
		Training Outline
APPL		Organizational Information
Applica		Employee Eligibility
Grant/A		Company Documentation Upload
Current	Optiona	al de la constante de la const
Total Ar Reques		ACH Authorization Form



2. You now see the list of forms you need to complete before submitting your application:

Details	t Information: <u>VTP-APP-B-2017-VTCO-00005</u>		
orms Status	Page Name	Note Created By	Last Modified By
General I	nformation		
	Applicant Information		
	Training Outline		
	Organizational Information		
	Employee Eligibility		
	Company Documentation Upload		
	RDC Comments		
Training 9	Specifics		
	Vendor Training Matrix		
	On-Site Training Matrix		
	Training Documentation Upload		

As an applicant, you will need to compete all of the forms listed in the General Information section and at least one matrix and the documentation upload form in the Training Specifics section in order to change the status of you application to Application Submitted. **PLEASE NOTE:** Fill in all forms as completely as possible; fields marked with a red asterisk (*) are required.

STEP 4: Submitting the Application

Once you complete and save the forms in the General Information and Training Specifics sections, you will need to change the application status to Application Submitted.

1. From the breadcrumb menu at the top of the page, hover over the 'Status Changes' link to get a popup window of the possible statuses, click on the 'APPLY STATUS' button under APPLICATION SUBMITTED:

Menu Kerne Men	u 🕣 <mark>Status Changes</mark> 🕥 <u>Management Tools</u> 🔇 <u>Related I</u>	Documents and Messages
	Status Changes	
Back	Possible Statuses	
VTP Busines	APPLICATION SUBMITTED	S
Please complete all requir	APPLY STATUS	
Document Information		

- 2. If there are no errors,
 - a. You will return to the document main menu and see the Current Status has changed to Application Submitted.



b. You will then receive a notification, by email and system message, that your application has been submitted and that VTP Staff will contact you after reviewing your application:

Priority	Sender	Subject	Date/Time
	System, Grant	VTP Application VTP-APP-B-2017- VTPTestCo-00002 Received	4/11/2016 3:09:11 PM
Recipie	ents		
Program VTPTes	m (VTP). For your ref stCo-00002.	ting an application for training funding to erence, your application number is: VTf	P-APP-B-2017-
VTP sta possible		oplication and get back to you with any o	questions as soon as
Thank y	/ou.		
	rants Site: <u>https://gr</u> rector: <u>john.young@</u>	ants.accd.vermont.gov overmont.gov	
Related E	Document: <u>VTP-APP</u>	-B-2017-VTPTestCo-00002 (1)	

If there are errors,

a. You will get an error page that lists all of the pages with errors:



- b. Go to each page with errors and correct each form.
- c. Return to #1 in this section (STEP 4: Submitting the Application) and repeat the steps to change the status.

STEP 5: Review Process

At this point, your application will be reviewed for completeness by VTP staff. They may request you make modifications to some of your forms. If so, they will place the application in *Application Modifications Required* status, where you will be able to make the updates they are requesting. Once you have made the requested

modifications, you will need to change the status back to *Application Submitted* (follow STEP 4 to change the status).

The application will then move on to the official review by the VTP Director, a VTP review team, and the Commissioner of the Department of Economic Development (DED Commissioner). Then you will receive notification as to whether your application has received initial approval or been denied. If your application has received initial approval, VTP staff will draft the grant agreement.

STEP 6: Grant Agreement Review & Acceptance

You will receive an email and system notification when the grant is ready for your review and acceptance:

		Drag Here 😚
Priority Sender	Subject	Date/Time
<u>System, Grant</u>	VTP Application Approved for VTP- APP-B-2017-VTPTestCo-00002, Grant Agreement Acceptance Required	5/23/2016 3:11:56 PM
	Program is pleased to offer funding for Please log in to the IntelliGrants systen	
If you would like modificatio Agreement Modifications Re	ns to your grant agreement, change the equired".	e status to "Grant
To accept the grant agreem status to "Grant Agreement a	ent as written, fill in the certification pag Accepted".	e and change the
Related Document: VTP-APP	B-2017-VTPTestCo-00002 (1)	•

PLEASE NOTE: You must be a Financial Officer, Authorizing Official or Senior Authorized Official to accept the grant agreement on behalf of your organization.

- 1. Log on to the system (see note directly above) and click through to your application's main menu by clicking:
 - a. the 'Related Document' link on your system notification (in your My Inbox),
 - b. the link to the document in your 'My Tasks' menu, or
 - c. by using the search tabs to find your document
- 2. Click the 'Forms Menu' link.

Your forms listing will now have a new section called *Grant Agreement* and there will be a link to your draft grant agreement.



3. Click on 'Grant Agreement'. Clicking the link will download a PDF.

Grant A	Grant Agreement		
Ø	Grant Agreement		
2	ACH Authorization Form		
	Grant Agreement Acceptance		
2	ACCD Grant Agreement Approval		

- 4. Review the draft thoroughly.
- 5. *If there are errors or the grant agreement needs modifications:* (skip to #6 if all is correct)
 - a. Return to the breadcrumb menu, hover over 'Status Changes' and click the 'APPLY STATUS' button under GRANT AGREEMENT MODIFICATIONS REQUIRED:

🕒 Menu 🕒 Forms Menu 🔿 Status Changes 📎 Management Tools 🔇 Related Documents and Messages					
Back	Status Changes Status Changes Possible Statuses				
Document Information Details	GRANT AGREEMENT MODIFICATIONS REQUIRED				
	GRANT AGREEMENT ACCEPTED				
APPLICATION SNAP					

b. You will be returned to the document main menu and can see that the application status has been changed:

Document Information: <u>VTP-APP-B-2017-VTCO-00005</u> Details					
Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	VTP Business Application 2017	Vermont Company	Financial Officer	Grant Agreement Modifications Required	N/A - N/A N/A

c. You may either communicate required changes to VTP staff via email or via the built-in Notes feature in IntelliGrants on any pages that need updates.



- 6. If there are no errors or modifications needed,
 - a. Return to the document's forms listing and click on the 'Grant Agreement Acceptance' link:

Grant A	greement
Ø	Grant Agreement
2	ACH Authorization Form
	Grant Agreement Acceptance
	ACCD Grant Agreement Approval

b. Complete the acceptance form by checking the certification check box (1.) and selecting your name from the Organization Signatory drop-down list (2.). Then save the form and change the status by clicking the 'Save & Move to Grant Agreement Accepted Status' button (3.)

	SAVE	SAVE & MOVE TO GRANT AGREEM		PRINT VERSION	ADD NOTE	CHECK GLOBAL ERRORS
			3.			
🔇 <u>Back</u>						
Document Inf	ormation: VTP-APP-B-2017	VTCO-00005				
Details						
You are here:	> VTP Business Application 20)17 Menu > Forms Menu > Gr	ant Agreement			
GRANT AGR	EEMENT ACCEPTANCE					
Please certify the Status' button.	at your have reviewed the grant a	greement and accept the terms of	f the grant agreement. C	lick 'Save & Move	to Grant Agree	ement Accepted
Grant Agreeme	nt:VTP-APP-B-2017-VTCO-0000	5				
Organization:	Vermont Company 123 St Thistown, VT 05000 Phone: (802) 000-0000 Fax: 8025055552					
Certification						
I have reviewed	the grant agreement, and as signa	tory for the recipient organizatio	n, I accept this grant agr	eement and all of it	s terms <mark>. 🗹 *</mark>	1.
Organization Sig	natory:	Test SAO V	<mark>, 2</mark> .			
Signatory Title: Date:		Senior Authoriz 9/8/2016	ed Official			

c. To finalize your acceptance of the grant, click the 'I Agree' button to finish changing the status:

Agreement
Please make a selection below to continue.
Please confirm: I, Test FO, have reviewed the grant agreement, and as signatory for the recipient organization, I accept this grant agreement and all of its terms. If you would like to include notes about this status change, please supply them below. 0 of 2000 I AGREE IDD NOT AGREE



d. You will be returned to the document main menu and can see that the application status has been changed:

Document Information: <u>VTP-APP-B-2017-VTCO-00005</u> Details					
Info	Document Type	Organization	Role	Current Status	Period Date / Date Due
	VTP Business Application 2017	Vermont Company	Senior Authorized Official	Grant Agreement Accepted	N/A - N/A N/A

STEP 7: ACCD Grant Approval

The final step in the process is approval of the accepted grant agreement by the DED Commissioner. You will be notified via email and system message when this step has been completed and you may begin training.

			Drag Here 😚			
Priority	Sender	Subject	Date/Time			
	System, Grant	VTP Grant Awarded for VTP-APP-B- 2017-VTPTestCo-00002	5/23/2016 3:42:24 PM			
Recipie	nts					
Hello, The Vermont Training Program is pleased to inform you that your grant, VTP-APP-B-2017- VTPTestCo-00002, has been approved by the Agency of Commerce and Community Development Authorizing Official. You may begin submitting invoices in accordance with the grant provisions at the end of the month and/or as training is successfully completed. Thank you!						
IntelliG	rants Site: <u>https://gra</u>	ants.accd.vermont.gov				
VTP Dir	rector: john.young@	vermont.gov				
elated D	ocument: <u>VTP-APP-</u>	B-2017-VTPTestCo-00002 (1)				
CLOSE	PRINT	'E				