TDEM Grants Management System

grants.tdem.texas.gov tracks Emergency Management grants in Texas. The system manage
the process from application through closeout.

GMS Job Aids

https://grants.tdem.texas.gov

tdem.gms@tdem.texas.gov

Table of Contents

What is TDEM (Texas Division of Emergency Management) Grants Management System (GMS)? 1

Public Home Page 2

How do I Sign Up for the Grants Management System (GMS)? 3

Quick Start Guide for Obtaining Grants Management System (GMS) Access 4

Register for GMS Access – Applicants 5

Reset Password (Forgot Login) 8

Change Password 9

User Profile / Update Contact Information 11

My Home Page 12

Menu Bar 14

My Inbox 15

My Favorites 19

Help Button and Help Guide 21

Submit a Support Ticket 23

Apply Filters to a List 28

Quick Search on a List 29

Print a List 30

Export Lists to Excel 31

Header with Breadcrumb 32

Create a Preset or Custom Menu 33

Edit or Delete a Preset 37

Attach Documents or Add Notes 40

View, Edit, Delete, Move, or Link Documents 44

Zip a Large File 49

View Your Contacts 51

Locate State Contacts 52

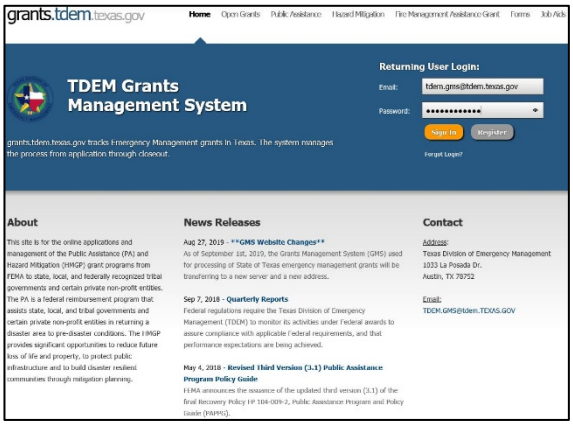
Accounts 54

Create an Account 55

Submit Request for Public Assistance (RPA) 56

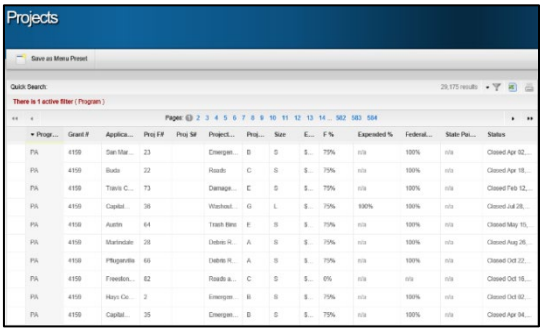
Find an Existing Request for Public Assistance (RPA) 58
Withdraw Requests for Assistance 61
Create Account Appeal 65
Account Closeout 69
Find a Project 75
Find Project Worksheet (PW) & Supporting Documentation 77
Project Scope Modification/Cost Change 79
Project Time Extension 86
Small Project Closeout 92
Large Project Closeout 97
Create Project Appeal 103
Look Up an Existing Appeal 109
Advance of Funds Request 110
Create a New Expense 115
Convert Expenses to a Reimbursement Request 121
Look Up a Payment 124
Quarterly Reports 126

What is TDEM (Texas Division of Emergency Management) Grants Management System (GMS)?

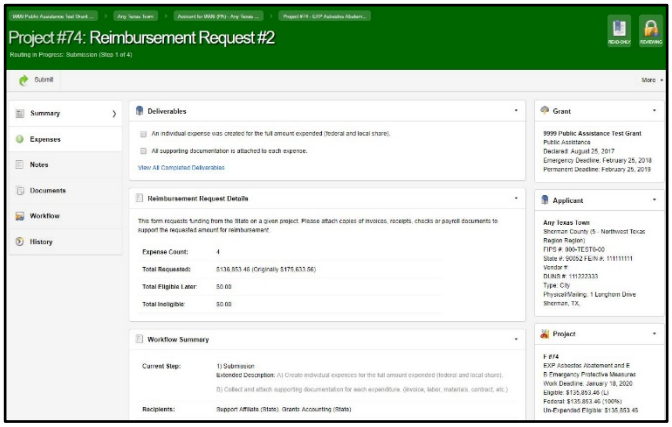


GMS integrates with data from both FEMA (Federal Emergency Management Agency) and State financial systems, and helps applicants keep all of their PA (Public Assistance) and HM (Hazard Mitigation) documents and data in one place. It is a user friendly tool that allows applicants to monitor the status of all of their FEMA grants, and submit application requests, such as Requests for Appeals, Requests for Time Extensions, Request for Closeout, directly to the State. There are also payment requests such as Request for Advance and Request for Reimbursement that have proven to speed the process considerably in other states.

GMS integrates data, documents, workflows, email notifications, a customized inbox, meetings, task tracking, issue tracking, reporting, and a host of customized grant management modules. Here are just a few of the easy to use tools that will help applicants better manage their FEMA, PA, and HM grants.



- **Quarterly Reports** – This module ties all of an applicant's current projects to a Quarterly Report submission system. Simply edit the values that may have changed, and hit the submit button. It even remembers entries from last quarter, making this usually laborious and time consuming process a snap.
- **Request for Reimbursement** – This request module allows applicants to submit their payment requests directly in the system, attach supporting documentation, monitor the approval process, and the subsequent payment, all in the system.
- **Request for Advance** – This request module allows applicants to submit their request and justification directly in the system, and monitor the approval process and the subsequent payment.
- **Request for Time Extensions** – Because the system tracks project work deadlines, this module is a handy way for applicants to request an extension, and to monitor that request as it is reviewed by the state and then by FEMA.
- **Scope Changes** – Manage all grant project scope changes in the system. PA versions automatically update the system when they are obligated, which, like many areas of the system sends the applicant's staff an automated email informing them of the change. HM scope changes come in the form of a request from the applicant in the system, which is then reviewed by the State and forwarded to FEMA.

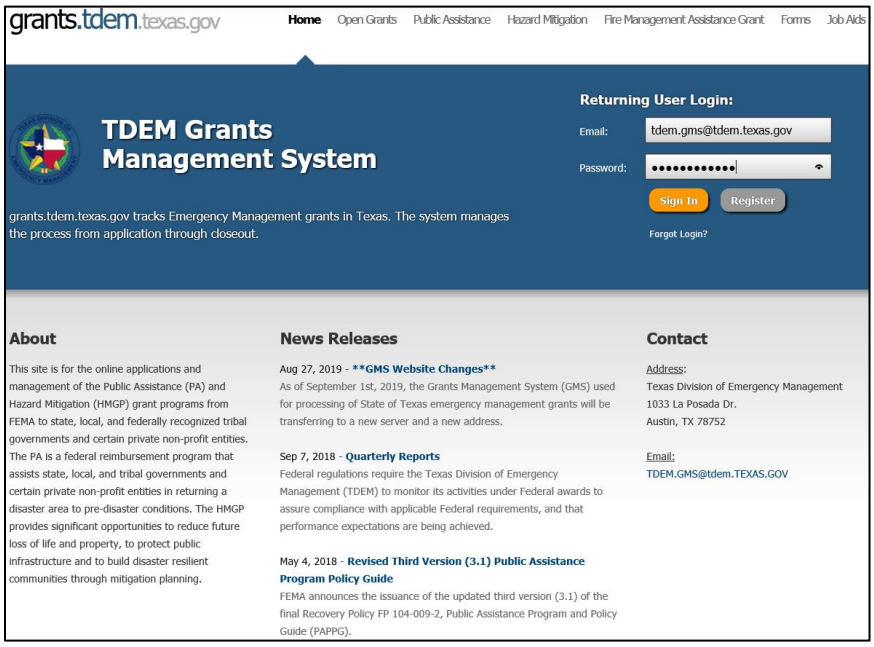


- **Appeals** – When a grant award is made, FEMA allows for a project appeal, and the system allows applicants to request that an appeal be generated for that grant. The system manages the process and applicants can continue to monitor the progress and receive notifications relative to that appeal.
- **Closeout** – When a project is finished and fully funded, applicants may submit a Request for Closeout which notifies the State to start the process of final review.

These are just a few of the features of GMS. The tool helps applicants keep all of their documents and data in one place, and provides a suite of support services that will help manage all aspects of their FEMA Grant Programs.

Public Home Page

The Public Home Page is the same as the User Login page. Grants.tdem.texas.gov is a web-based portal which manages the entire Public Assistance (PA) and Hazard Mitigation Grant Program (HMGP) process. The portal centralizes PA and HMGP information, connects applicants, the State, and FEMA in one place.

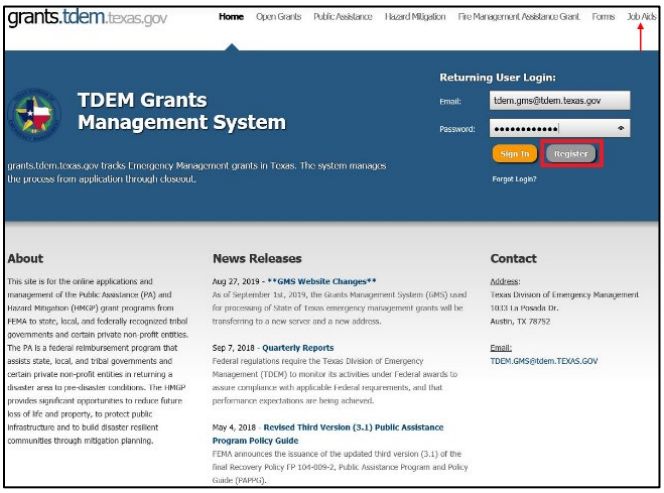


Note: *You do not have to be a user to view information on this page.*

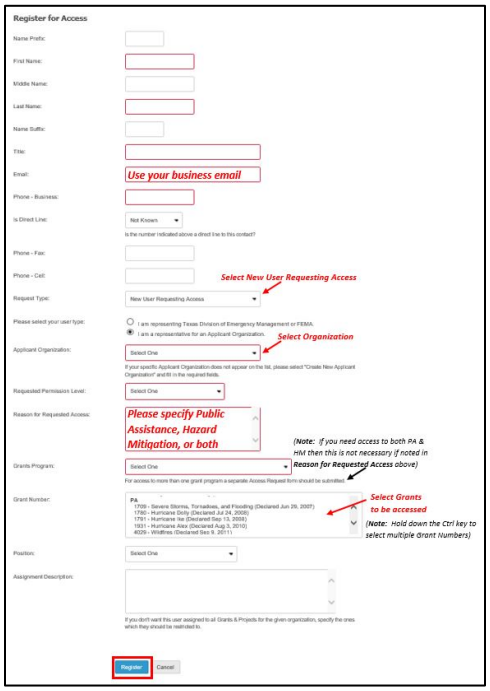
At the top, right hand side of the screen, click on tabs to view the following:

- **Home** *(Default Tab)*: Returning User Login, Forgot Login, Register for Access, About the Texas Division of Emergency Management (TDEM) Grants Management System (GMS), News Releases, and Contact Information
- **Open Grants:** List and description of all open grants
- **Public Assistance:** Disaster specific guidance, and FEMA publications
- **Hazard Mitigation:** Program overview, updates, and documents
- **Fire Management Assistance Grant:** Useful links, updates, and documents
- **Forms:** Public Assistance, Hazard Mitigation, Fire Management Assistance Grant, and Common Forms for these programs
- **Job Aids:** Tools for assisting in performing tasks within GMS

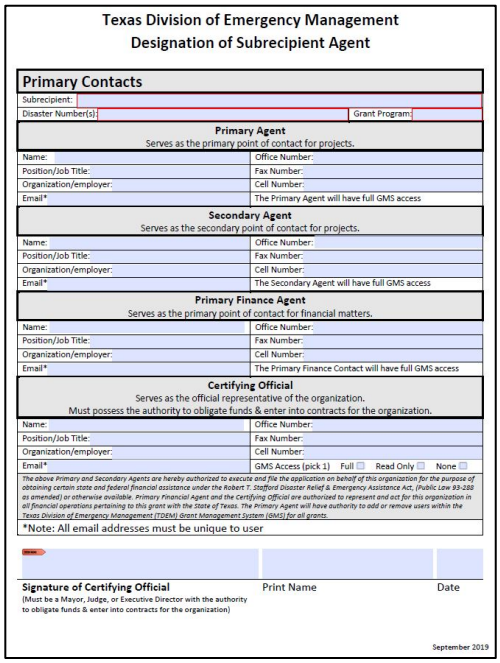
How do I Sign Up for the Grants Management System (GMS)?



1. In order to access GMS you will need to go to https://grants.tdem.texas.gov to register. Click on the gray ***"Register"*** button, and complete the form. You can click on ***"Job Aids"*** at the top of the screen to get detailed information on how you can complete the online form to register for access.



2. In addition to registering, if we do not have a current Designation of Subrecipient Agent (DSA) Form for the grant/program for which access is being requested, a DSA must be completed and signed by the Certifying Official for your entity. *The Certifying Official must be a Mayor, Judge, or Executive Director with the authority to obligate funds and enter into contracts for the organization.* The signed, dated, and completed form should be emailed to TDEM.GMS@tdem.texas.gov. If we have a signed DSA on file, we will email the primary contact at your entity to request permission to grant you access to GMS.



Texas Division of Emergency Management
Designation of Subrecipient Agent

Primary Contacts

Subrecipient:
Disaster Number(s):
Grant Program:

Primary Agent
Serves as the primary point of contact for projects.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	The Primary Agent will have full GMS access

Secondary Agent
Serves as the secondary point of contact for projects.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	The Secondary Agent will have full GMS access

Primary Finance Agent
Serves as the primary point of contact for financial matters.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	The Primary Finance Contact will have full GMS access

Certifying Official
Serves as the official representative of the organization.
Must possess the authority to obligate funds & enter into contracts for the organization.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	GMS Access (pick 1) Full ☐ Read Only ☐ None ☐

The above Primary and Secondary Agents are hereby authorized to execute and file the application on behalf of this organization for the purpose of obtaining certain state and federal financial assistance under the Robert T. Stafford Disaster Relief & Emergency Assistance Act, (Public Law 93-288 as amended) or otherwise available. Primary Financial Agent and the Certifying Official are authorized to represent and act for this organization in all financial operations pertaining to this grant with the State of Texas. The Primary Agent will have authority to add or remove users within the Texas Division of Emergency Management (TDEM) Grant Management System (GMS) for all grants.

*Note: All email addresses must be unique to user

Signature of Certifying Official
(Must be a Mayor, Judge, or Executive Director with the authority to obligate funds & enter into contracts for the organization)
Print Name
Date

September 2019

3. The link to the DSA form is: https://grants.tdem.texas.gov/site/Forms.cfm. The form is located under **Common Forms**.

4. Once your request has been approved, you will receive a system generated email with your Username and temporary password. The system administrators will also send an email informing you that you have been granted access to the system.

Quick Start Guide for Obtaining Grants Management System (GMS) Access

- Go to the GMS Website (https://grants.tdem.texas.gov) and click on the gray ***"Register"*** button

. For complete instructions, see the *Register for GMS Access* job aid.

- If we have a current signed Designation of Subrecipient Agent (DSA) form on file for your entity, the system administrators will request permission from the primary contact or access approver for your entity to grant you access to GMS.

- If we do not have a current signed DSA Form for the grant/program for which access is being requested, complete the DSA found under Common Forms on the GMS Website. Fill out all of the requested information. If you have not submitted the most recent form, you must complete a new form.

  Note: *All persons on the form must have a unique email address (the same email address cannot be used for multiple people).*

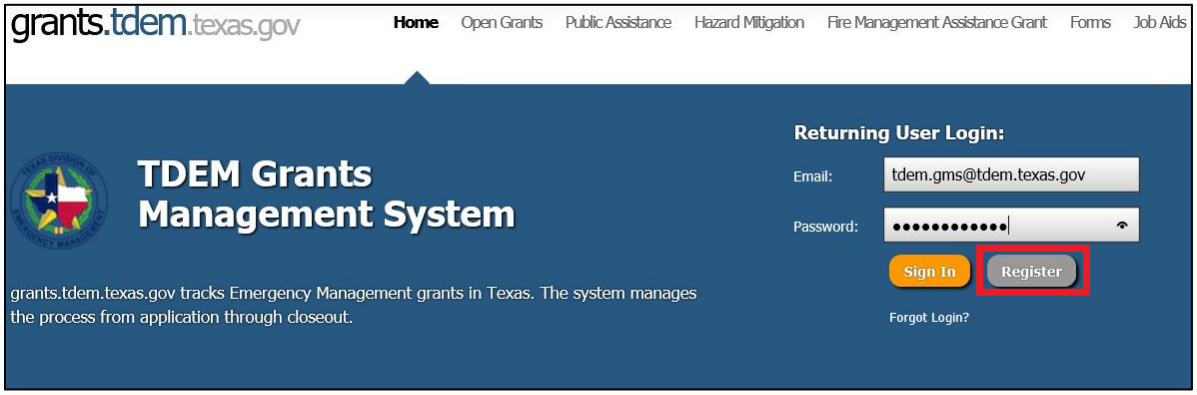
- The Certifying Official for your entity must sign and date the form. *The Certifying Official must be a Mayor, Judge, or Executive Director with the authority to obligate funds and enter into contracts for the organization.* Email the completed form to TDEM.GMS@tdem.texas.gov.

- GMS will generate an email with your Username and temporary password. The system administrators will also send out a supplemental email in case you do not receive the automatically generated email from GMS.

  Note: *It may take a few days to complete Access Requests after we have received the proper approvals. Please do not submit duplicate requests.*

Register for GMS Access – Applicants

1. Go to https://grants.tdem.texas.gov, and click the ***"Register"*** button.



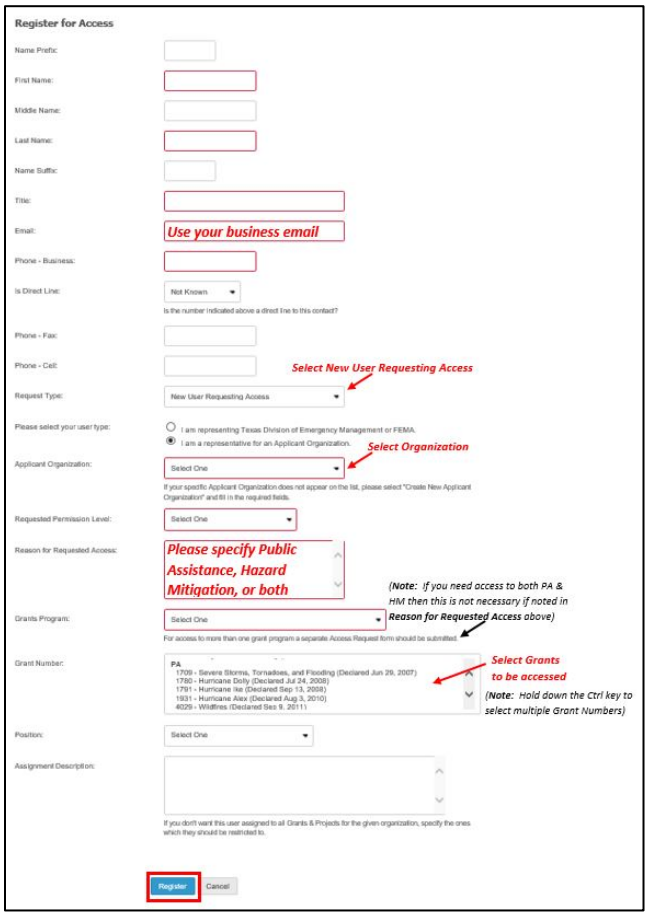
2. Complete the Registration form *(required fields will be highlighted with a red box, but please complete as much information as possible):*

- ***First Name****:* Enter the user's first name.
- ***Middle Name:*** Enter the user's middle name or initial.
- ***Last Name:*** Enter the user's last name.
- ***Title****:* Enter the user's current work title.
- ***Email****:* Enter the user's business/work email address. This address will be the user's log in username, and log in information will be sent to this address. ***Note****: The same email address cannot be used for multiple contacts.*
- ***Phone - Business****:* Enter a phone number where the user can be reached.
- ***Request Type****:* Select from the drop down menu if the user is a New User Requesting Access, or an Existing User Requesting Additional Access.
- ***Please select your user type****:* Select ***"I am a representative for an Applicant Organization."*** *(The other option is reserved for TDEM and FEMA employees.)*
- ***Applicant Organization****:* Select the applicant which the user represents from the drop down menu.
- ***Requested Permission Level****:* Select one of the two options from the drop down menu, 1) Applicant - Full Access, or 2) Applicant - Read Only.
- ***Reason for Requested Access****:* Enter comments as to why access is needed. Also, enter if the user is an Auditor – Applicant. If access is being requested for multiple Grant Programs, list them in this section.
- ***Grants Program****:* Select the grant program for which the user is requesting access from the drop down menu. If you are requesting access to multiple

Grant Programs, list them in the Reason for Requested Access. A separate Access Request form is not required.

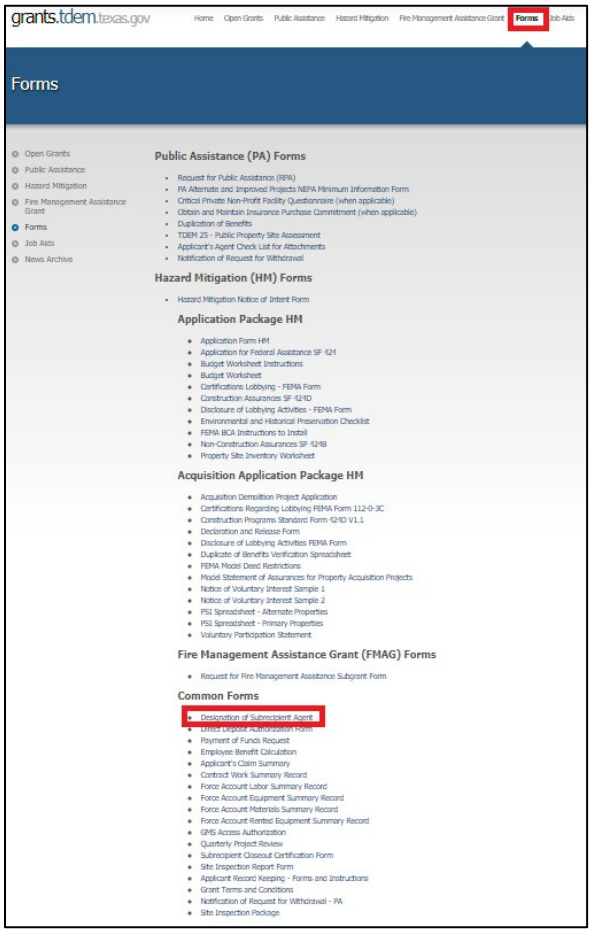
- ***Grant Number:*** Select the grant number listed under the Grants Program heading ***(in bold letters)*** for which the user is requesting access from the drop down menu.
  Note: *To select multiple Grant Numbers, hold down the Ctrl key on the keyboard and click the desired Grant Numbers.*
- ***Position:*** Select the position being requested from the drop down menu. If you are selecting to be the Primary, Secondary Agent, Primary Finance Contact, or Certifying Official you will need to submit a Designation of Subrecipient Agent Form found at https://grants.tdem.texas.gov/site/Forms.cfm.
- ***Assignment Description:*** If the user will be restricted to select projects for HMGP, please list here.

Click the ***"Register"*** button to submit the form.



3. In addition to registering, if we do not have a signed Designation of Subrecipient Agent (DSA) Form on file for the grant/program being requested, a DSA form must be

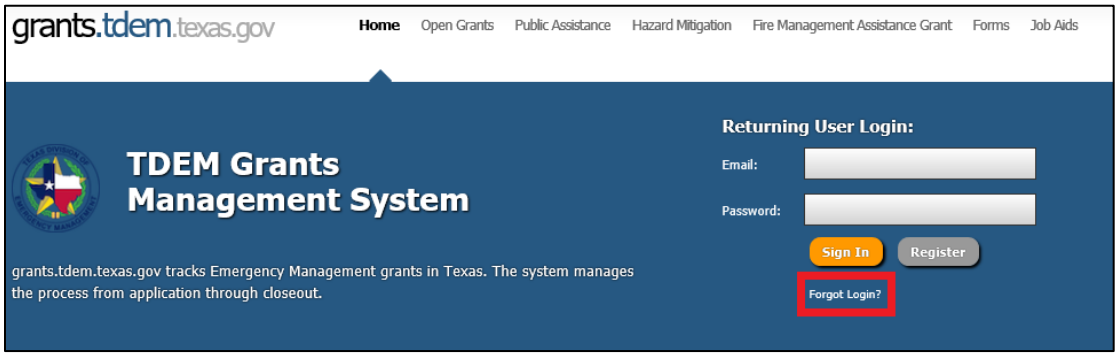
completed and signed by the Certifying Official for your organization. *The Certifying Official must be a Mayor, Judge, or Executive Director with the authority to obligate funds and enter into contracts for the organization.* The signed and completed form should be emailed to TDEM.GMS@tdem.texas.gov. The form can be found by clicking on ***"Forms"*** at the top of the Grants Management System (GMS) home page. The link to the form is https://grants.tdem.texas.gov/site/Forms.cfm. If we have a current signed DSA on file, the system administrators will email the primary contact/access approver for your entity to request permission to grant you access to GMS.



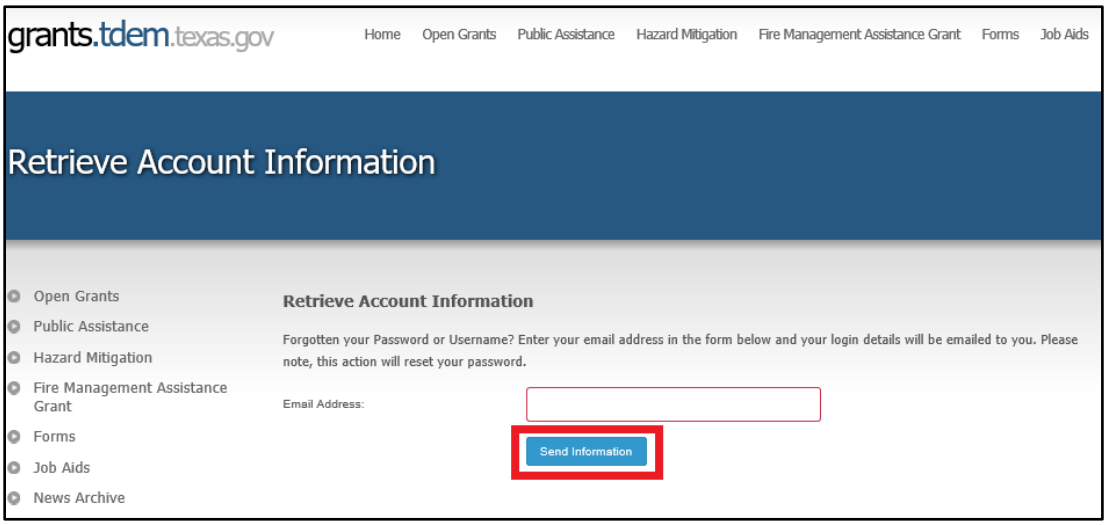
4. The system administrators will set up the new user account, and a system generated email from grants.tdem.texas.gov will be sent out. The email will include your Username and temporary password. The system administrators will also send an email informing you that your account has been set up.

Reset Password (Forgot Login)

1. If you forget your login information, click on ***"Forgot Login?"*** on the GMS website.



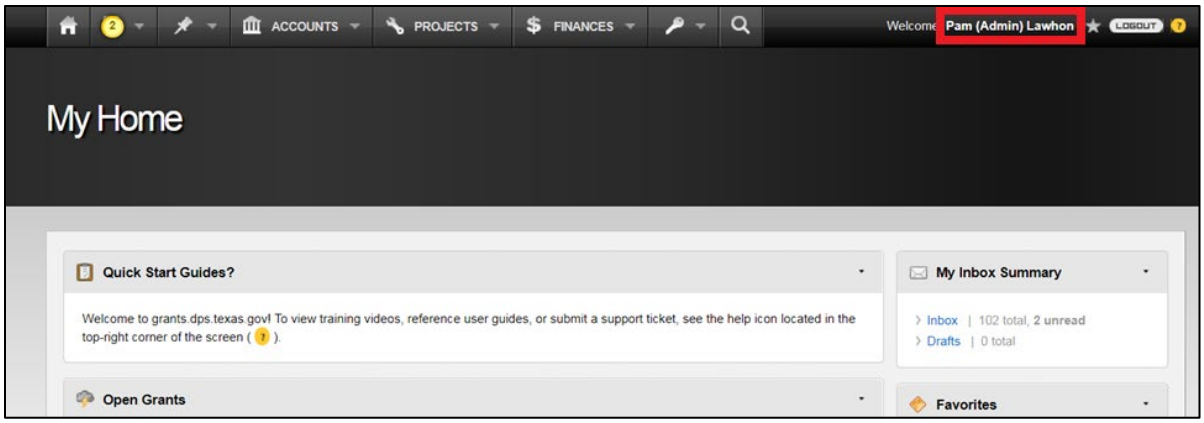
2. Type your email address in the red box, and click the blue ***"Send Information"*** button.



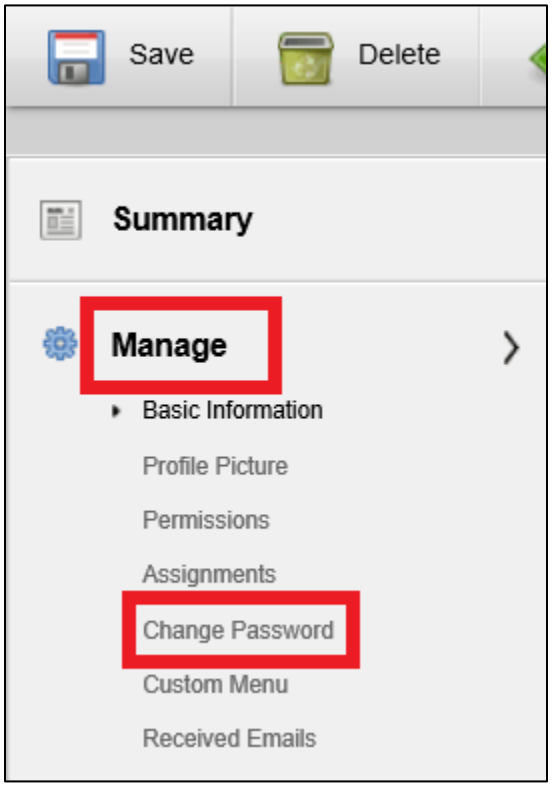
3. You will receive an email from no-reply@emgrantspro.com containing a link to reset your password.

Change Password

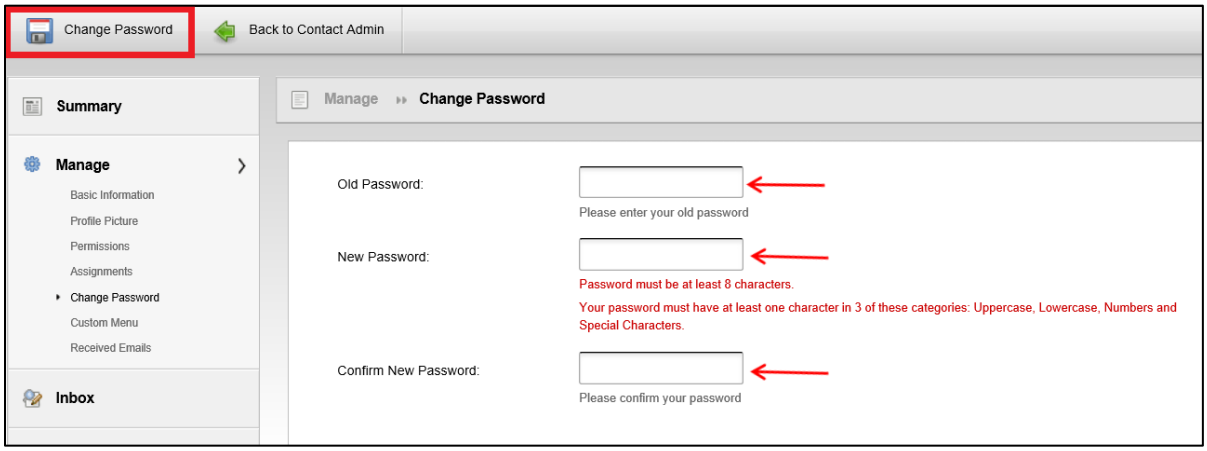
1. To change your password once you received a system generated password, select your name at the upper right had corner.



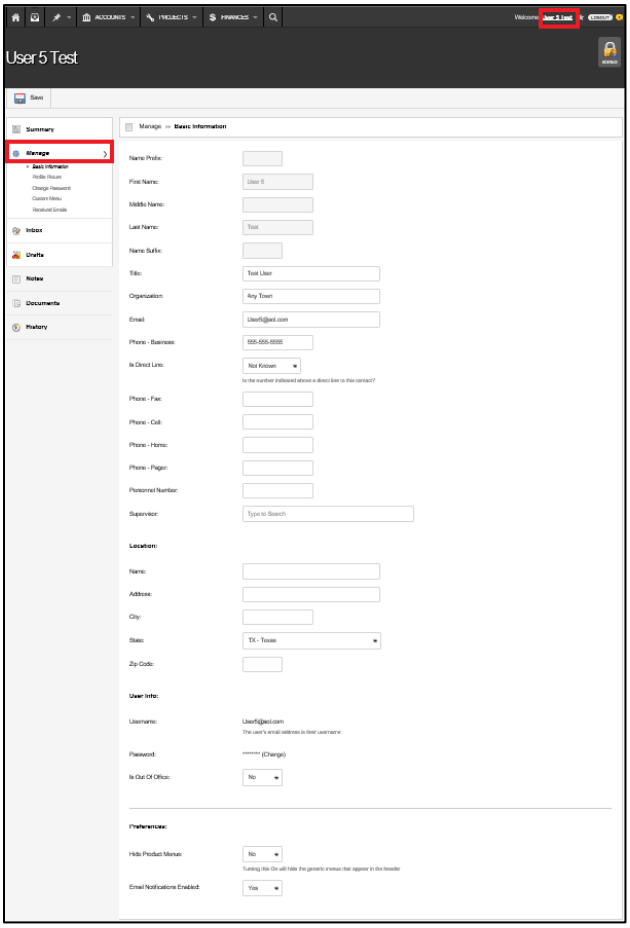
2. Select ***"Manage,"*** and then ***"Change Password."***



3. Enter the temporary password provided or old password in the box labeled ***"Old Password."*** Enter a ***"New Password"*** and ***"Confirm New Password."*** Then click the ***"Change Password"*** button above.



User Profile / Update Contact Information



By clicking on your name at the top right of the screen, you will be able to access your user profile. Your contact details will display. Click the ***"Manage"*** tab on the left navigation menu to do the following:

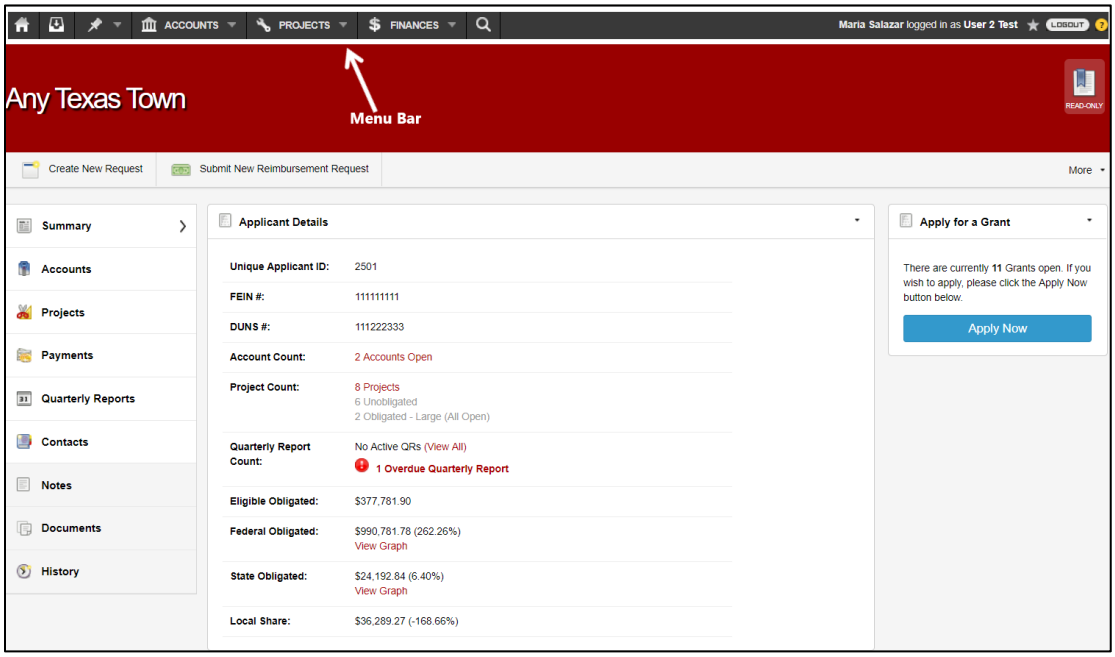
Edit your **Basic Information**

- Title
- Organization
- Email
- Phone Number(s)
- Supervisor *(must be GMS User)*
- Address
- Change Password
- Set out of Office Back-up User
- Set Email Notifications
- Change Profile Picture

If you need to change your name, please submit a support ticket. If you have changed organizations, you will need to register for access from the GMS login page, or submit a new DSA for your new organization.

My Home Page

The **Home** screen will give the user information, and the ability to navigate the system. The applicant that you represent will be displayed in the dark red area at the top of the page. If you represent multiple entities, the system will prompt you to ***"Choose an Applicant."***



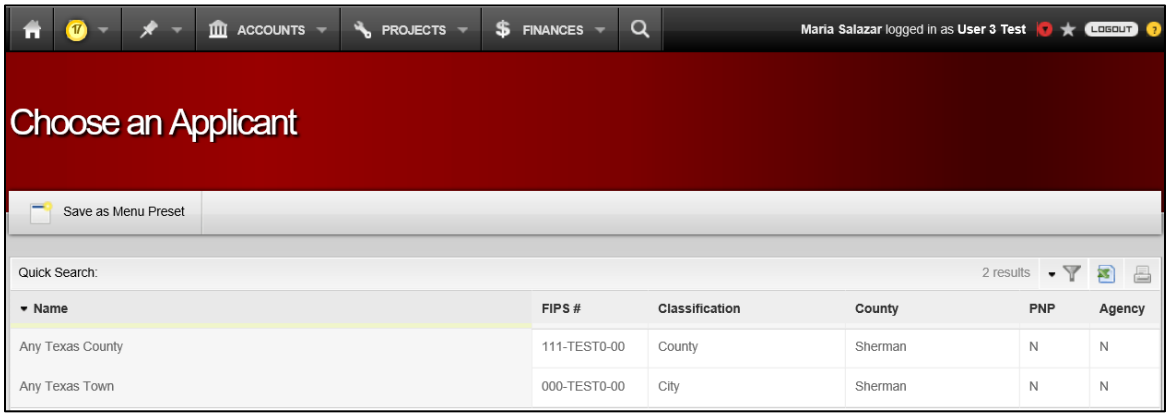
- **Applicant Details:** Number of open accounts, project count, number of quarterly reports, and other financial information will be listed in this section. The items in red are hyperlinked. Click on any of those items to get additional information.

- **Menu Bar:** Will appear throughout the system.

- **Create New Request:** This button is used for a Data Update Request to remove a contact or update any incorrect data on your organization's profile *(Support Ticket will be created)*.

- **Submit New Reimbursement Request:** Once you click on this button, you will be prompted to select the ***"Grant"*** and ***"Project"*** for the Reimbursement Request.

If you represent multiple applicants, you will be prompted to select an applicant in order to view the **Applicant Details** for the selected applicant, as displayed in the previous page.



Menu Bar

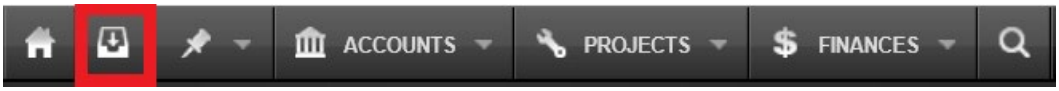
- **Home**: The Home icon navigates to the Home page.
- **My Inbox**: This is like your email. A round icon will appear on the **My Inbox** menu located on the Main Menu bar if a new item is received in your inbox and will indicate the count of unread new items.
- **Saved Presets** *(Thumb Tack)*: Allows the user to customize their menu.
- **Accounts Tab** *(Applicant + Disaster = Account)*: The Accounts Tab allows the user to navigate all account related requests, forms, listings, and reports. The white Quick Search field can also be used to type in any account related data, such as FIPS number or Applicant Name, and will display results dynamically below the Quick Search field.
- **Projects Tab**: The Projects Tab allows the user to navigate to all project related requests, forms, listings and reports. The white Quick Search field can also be used to type in any project related data, such as Project Number or Project Title, and will display results dynamically below the Quick Search field.
- **Finances Tab**: The Finances Tab allows the user to navigate to all payment related requests, forms, listings and reports. The white Quick Search field can also be used to type in any payment related data, such as Transaction Number or Voucher Number, and will display results dynamically below the Quick Search field.
- **Search** *(Magnify Glass)*: A quick search or advanced search can be performed from here. The advanced search allows for system-wide searches with several filter options or search criteria.
- **User Profile**: Clicking on your name will take you to the contact details page where user information can be edited depending on your level of permissions.
- **My Favorites** *(Star)*: Click on star to find the favorites you set.

?

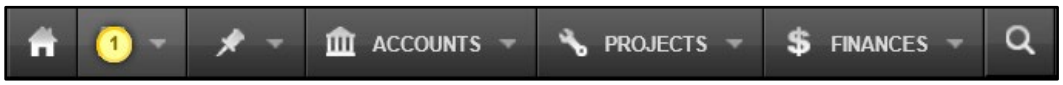
- **Help Button** : Clicking on the Help icon will give you the option to view the **Help Guide**, or **Open a Support Ticket**.

My Inbox

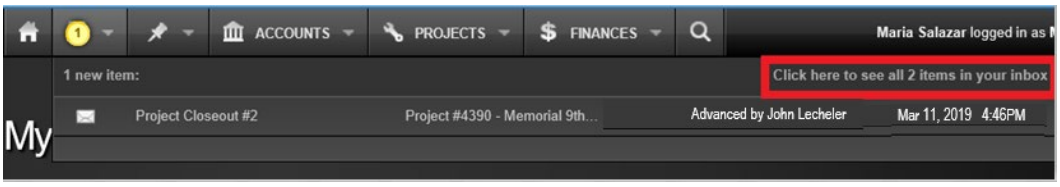
From your **Home** screen your **My Inbox** will be located at the top of your screen in the Menu Bar.



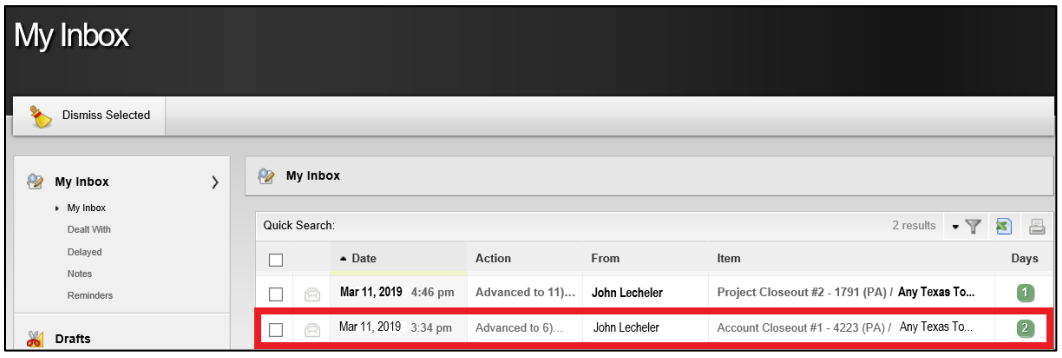
If you have mail in your **Inbox**, you will not see the icon. Instead you will see a yellow circle with a number which indicates the number of unread messages. This will give you a preview of the ten most recent messages.



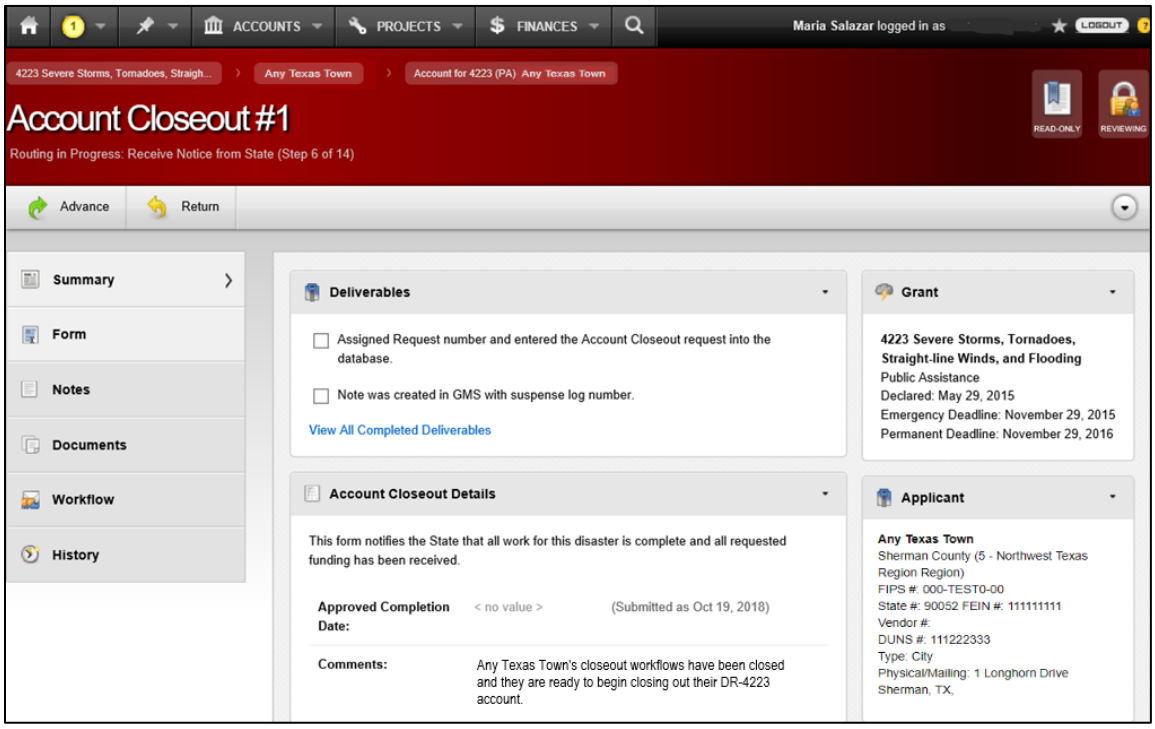
To see all the items in your **Inbox** click on the area highlighted in red below ***"Click here to see all 2 items in your inbox."*** This number will change depending on the number of items in your **Inbox**.



The items will display. The items are hyperlinked, so you can click anywhere on a particular line to navigate to that that item.

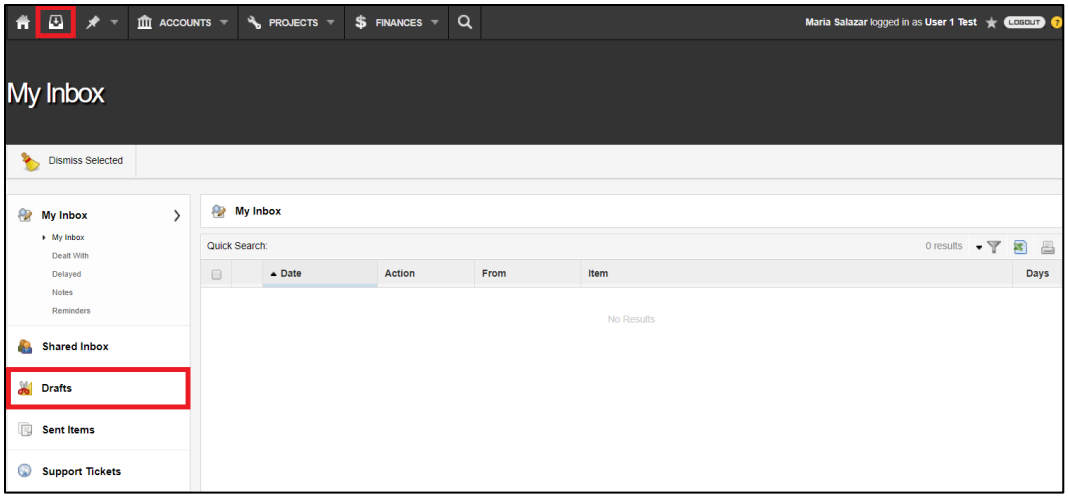


The selected item will display.

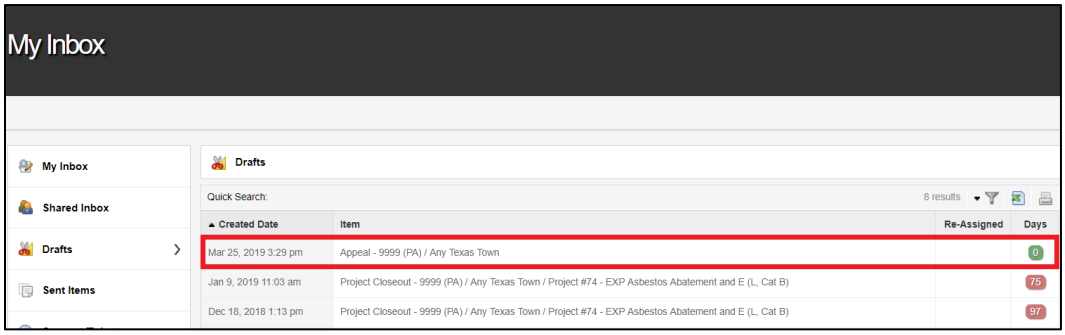


Drafts

*If a form was saved for later retrieval, it will be under the **My Inbox** menu. Click **"Drafts"** on the left side menu to retrieve the form.*


ACCOUNTS
PROJECTS
FINANCES
Maria Salazar logged in as User 1 Test
LOGOUT
My Inbox
Dismiss Selected
My Inbox
My Inbox
Dealt With
Delayed
Notes
Reminders
Shared Inbox
Drafts
Sent Items
Support Tickets
My Inbox
Quick Search:
0 results
Date
Action
From
Item
Days
No Results

The **Draft** documents will display. Select the item that you wish to retrieve *(items are hyperlinked)*, and the system will navigate to that item.



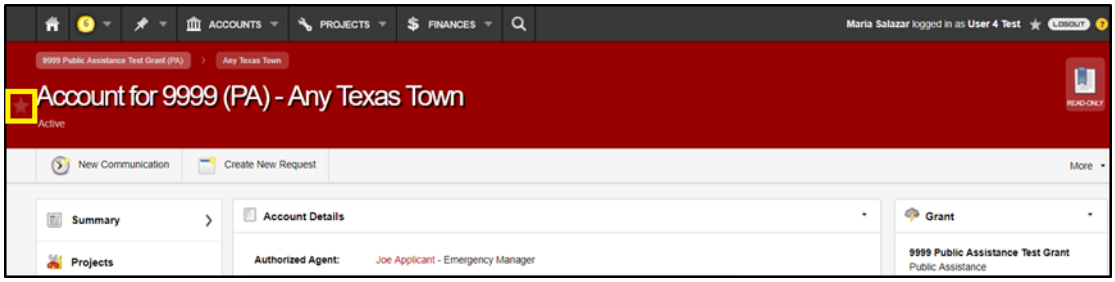
Once the desired item is open, changes can be made and additional documents can be added by clicking the ***"Add Document"*** button at the bottom of the page. Make sure to complete all of the **Deliverables** prior to submitting any form.

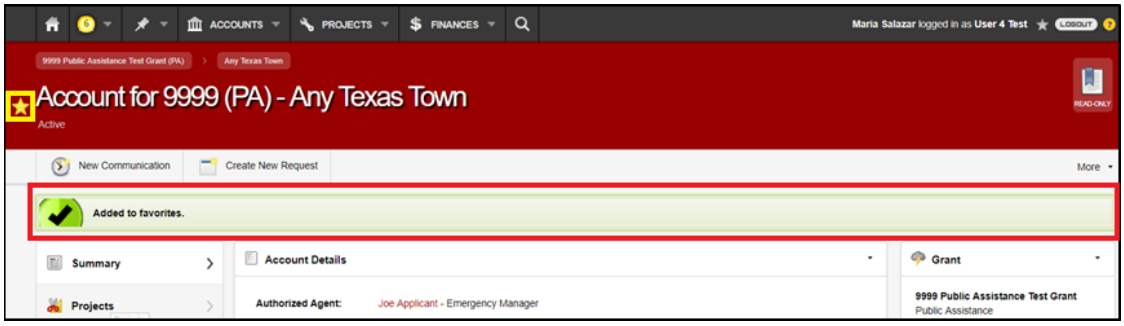
My Favorites

An applicant has the option of saving a particular page as a **My Favorites** to their Menu Bar. This is another easy and quick way to navigate the system. The **Star** on the Menu Bar located next to the user's name is the **My Favorites** tab.

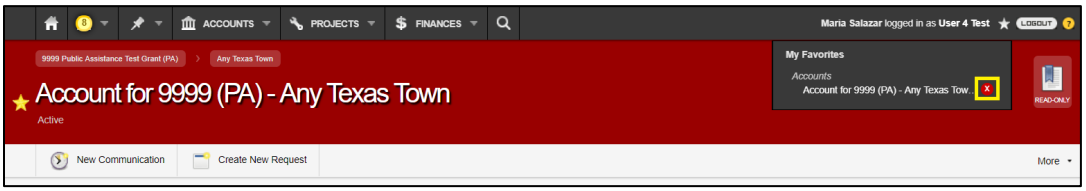
- **<u>View Favorites</u>:** Click on the ***"Star"*** and a **My Favorites** box will appear with a list of saved favorites the user created. Click on the desired item to be navigated.

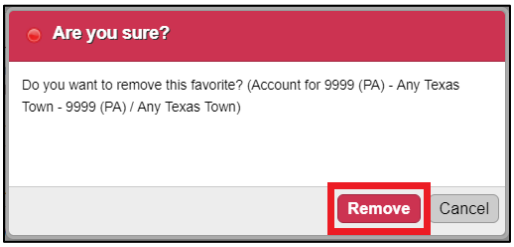
- **<u>Add Favorites</u>:** In the banner, located on the left hand side, a muted Star will appear next to the Heading. Click on the star and it will change to yellow. A green check mark ***"Added to favorites"*** will appear briefly. This page has now been saved to the **My Favorites** tab *(**Star** on the Menu Bar)*.

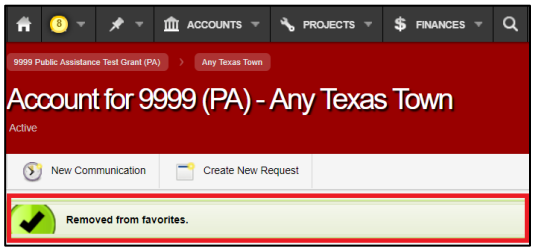




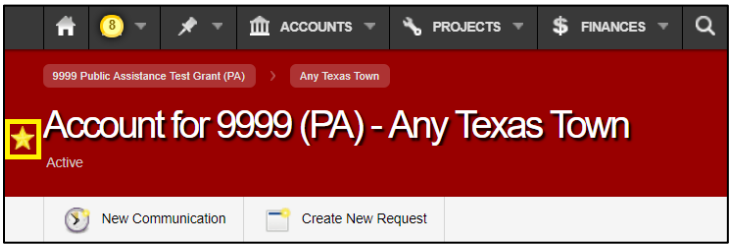
- **<u>Delete Favorites</u>:** There are two ways you can delete favorites:
  1) By clicking the ***"Star"*** on the Menu Bar, a **My Favorites** box will appear with a list of Headings (pages) you have saved. Place the mouse on the item you wish to delete and a red ⓧ will appear. Click on the red ⓧ and a pop-up window will appear asking "**Are you sure?"** Click on ***"Remove"*** to remove this item from **My Favorites.** A green check mark ***"Removed from favorites"*** will appear briefly. This page has now been removed from the **My Favorites** tab *(**Star** on the Menu Bar)*.

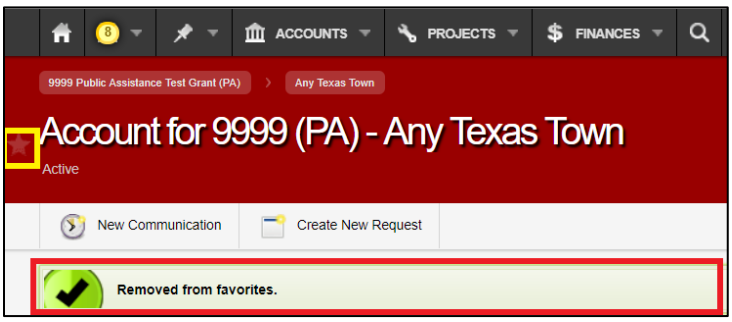






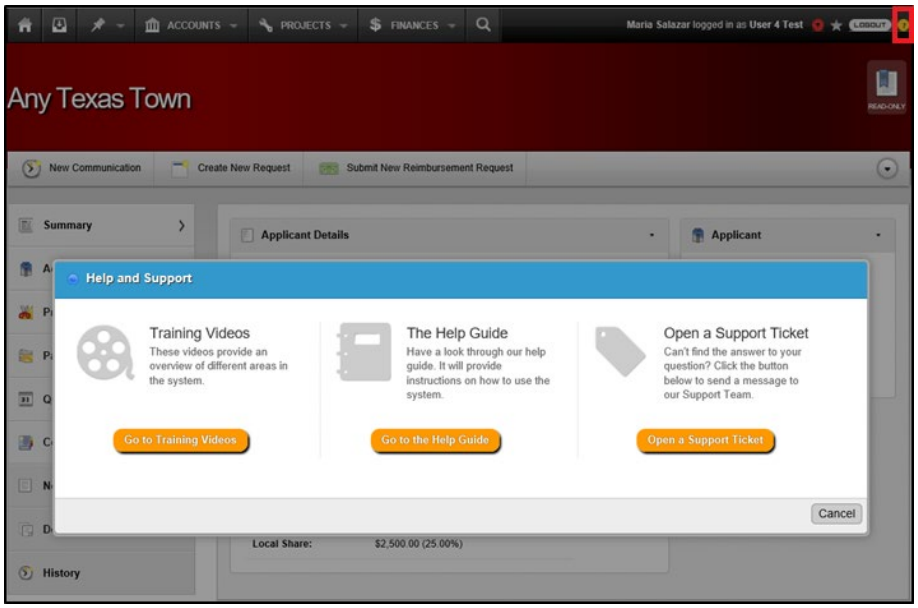
  2) Navigate to the favorite that you wish to remove from **My Favorites,** and click on the yellow Star. This will delete that page from **My Favorites**. A green check mark ***"Removed from favorites"*** will appear briefly. This page has been removed from **My Favorites,** and the Star will become muted.



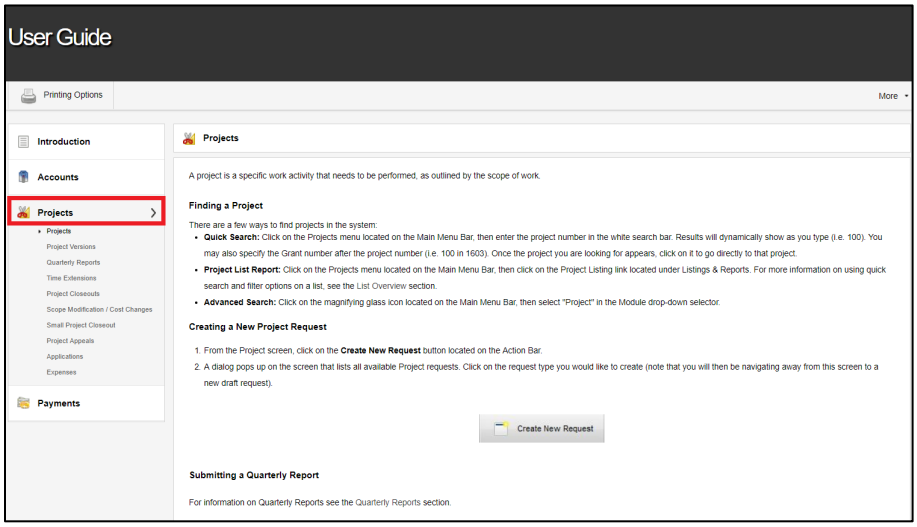


Help Button and Help Guide

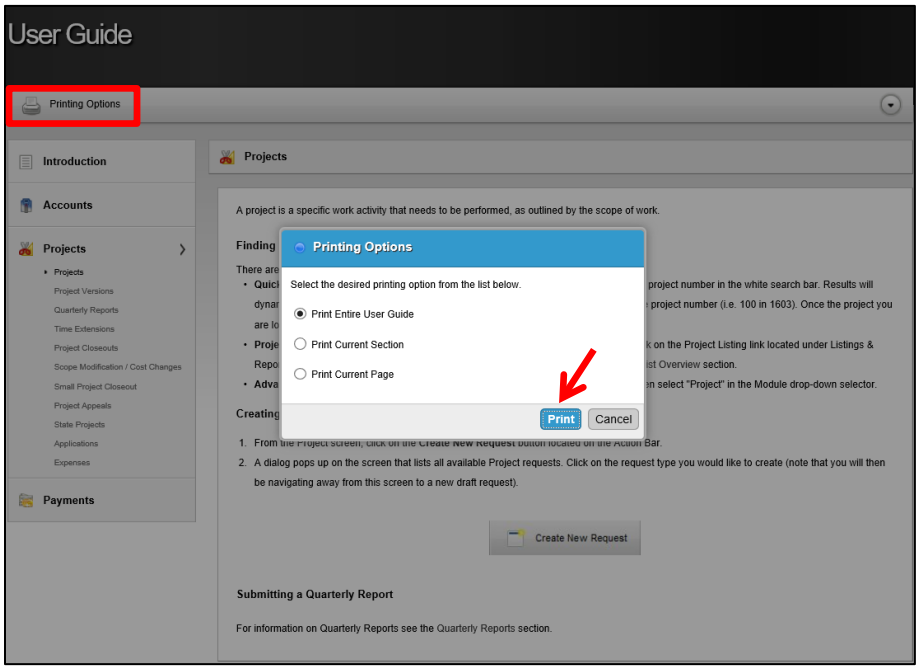
The **Help** button is a question mark located on the far right corner of the Menu Bar. Clicking on the **Help** button gives you the option to view **Training Videos**, access the **Help Guide,** or **Open a Support Ticket**.



- **The Help Guide** allows you to navigate to desired sections by using the tabs on the left of the User Guide.



Click the ***"Printing Options"*** button to view options. You can choose to print the entire Help/User Guide, current section, or current page. After making your selection, click the ***"Print"*** button.

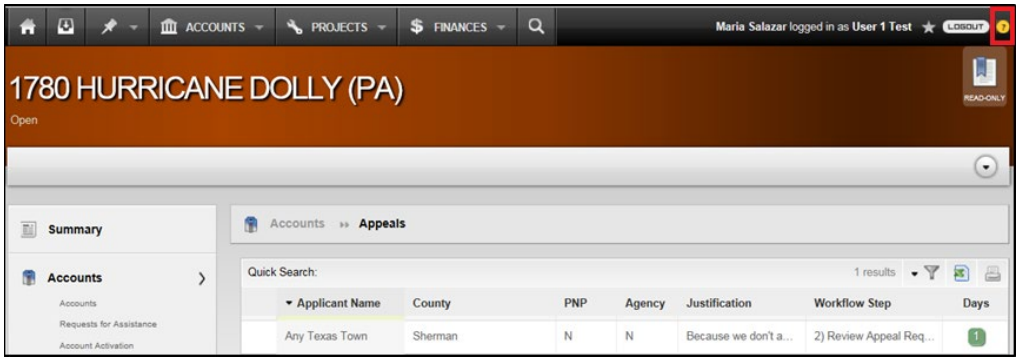


- **Open a Support Ticket** allows you to create a new support ticket. Click on the Help button from the page for which you have an issue or need support.

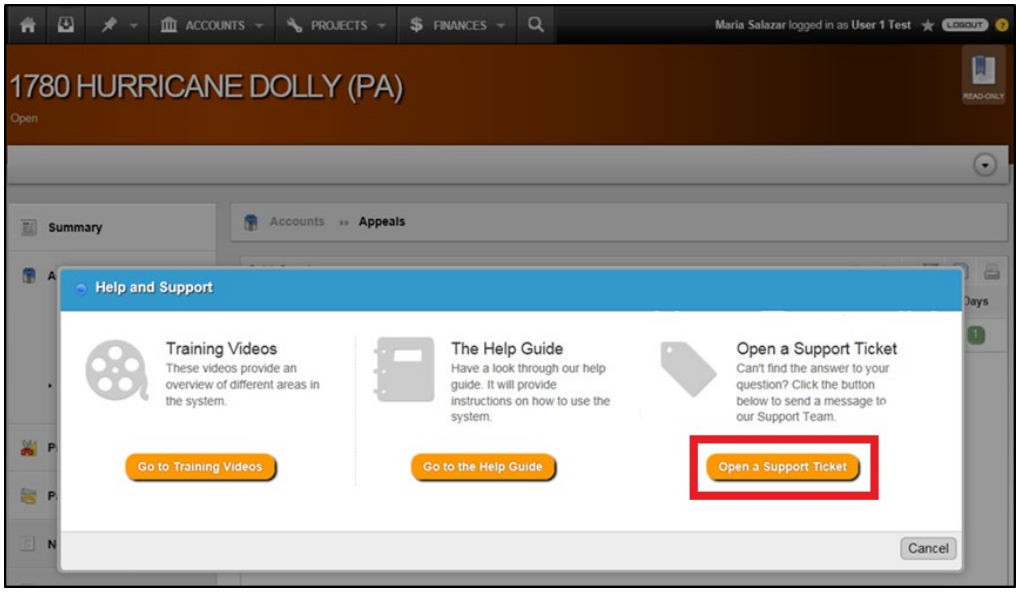
  Note: *It is important to click the* ***Help*** *icon from the page that you need help, as the system records the URL of the current page for analysis purposes.*

Submit a Support Ticket

1. Click on the ***"Help"*** button located on the far right of the **Main Menu** bar from the page where you are experiencing an issue or need support.
   (This is important as it records the URL of the page for analysis purposes)



2. Click the ***"Open a Support Ticket"*** button when the following window appears.

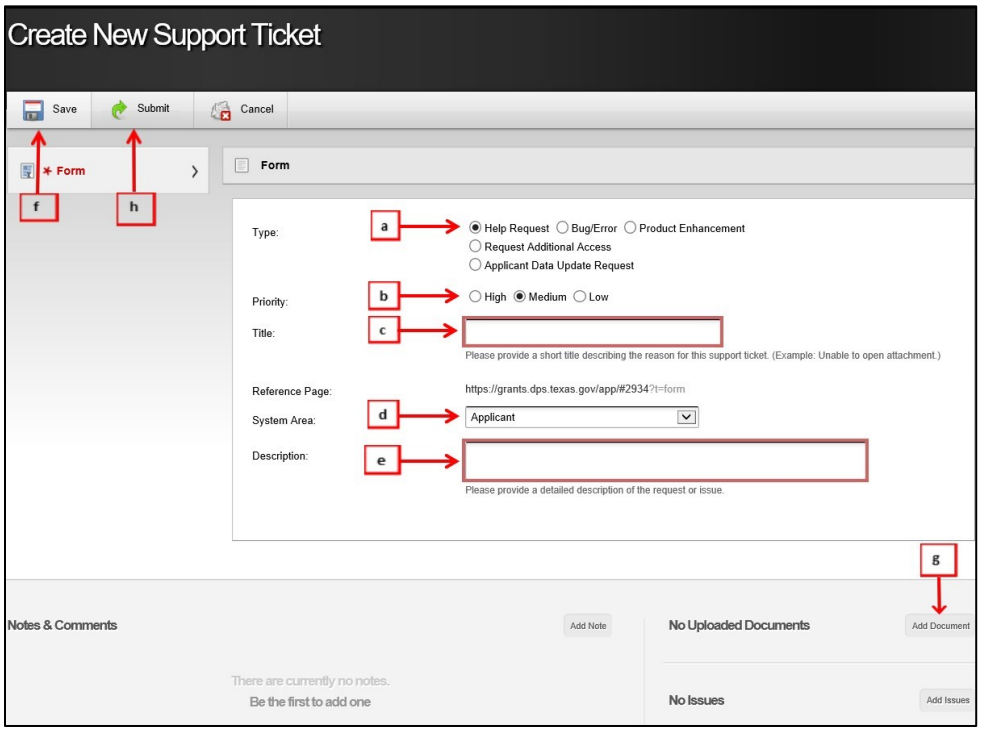


3. The form will display. Complete the Support Ticket form:

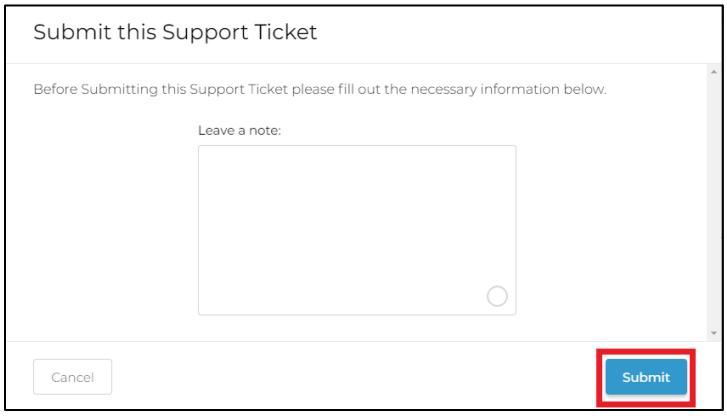
Note: *Mandatory fields are highlighted with a red square, but please complete as much information as possible.*

a. Select the appropriate ***"Type"*** *(of support needed)*.
b. Select ***"Priority"*** level *(medium is defaulted)*.
c. Enter a short ***"Title"*** *(brief description of request or issue)*.
d. Select ***"System Area"*** *(the system will pre-populate this field from the area where you clicked Help, or change it from the drop down menu)*.
e. Enter a detailed ***"Description"*** of the request or issue.
f. Click ***"Save"*** *(the form can be saved without submitting, and it can be retrieved at a later time from your **Drafts** under the **Inbox** menu)*. You must also save the form before attaching any documents.
g. Click the ***"Add Document"*** button to upload additional/supporting documentation, if necessary.
h. Click the ***"Submit"*** button when the form is complete.

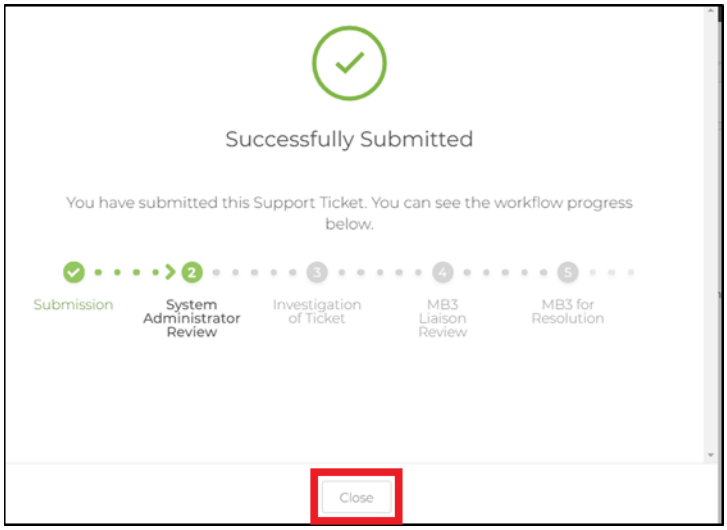
Support Ticket Form



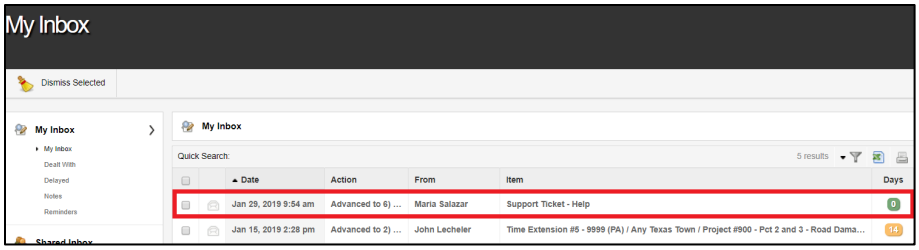
4. You may leave a note when this window is displayed, or just click the ***"Submit"*** button.



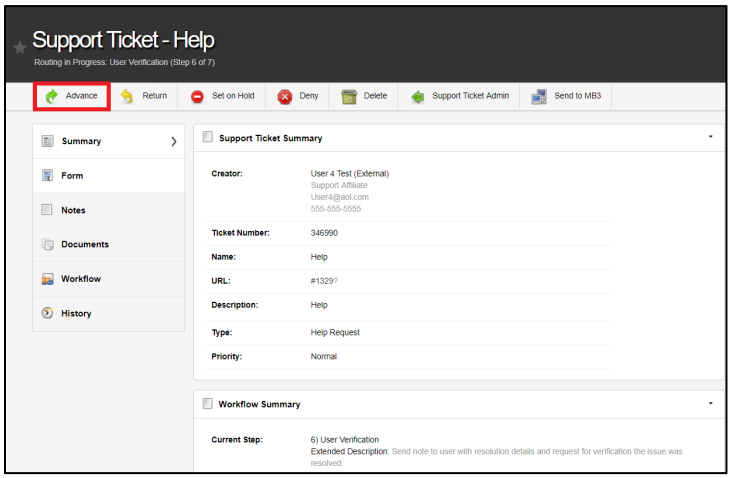
5. The Support Ticket has been successfully submitted. Click the ***"Close"*** button.



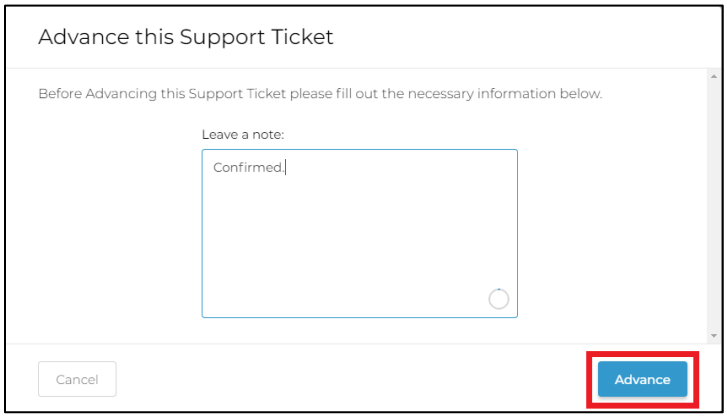
6. The Support Ticket will go into a queue. A System Administrator will process your request, and advance the support ticket to Step 6 for you to confirm that the Support Ticket was resolved. A notification will be sent to your Inbox. Click on the line that contains the Support Ticket. If you do not respond within 5 days the issue will be considered resolved.



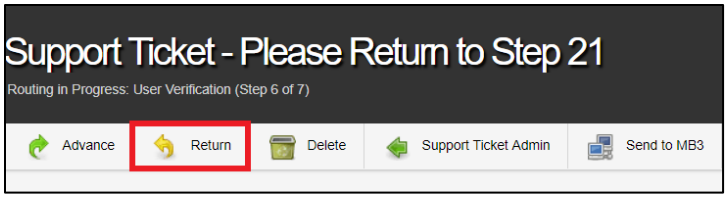
7. If the issue was resolved, confirm by clicking the ***"Advance"*** button.



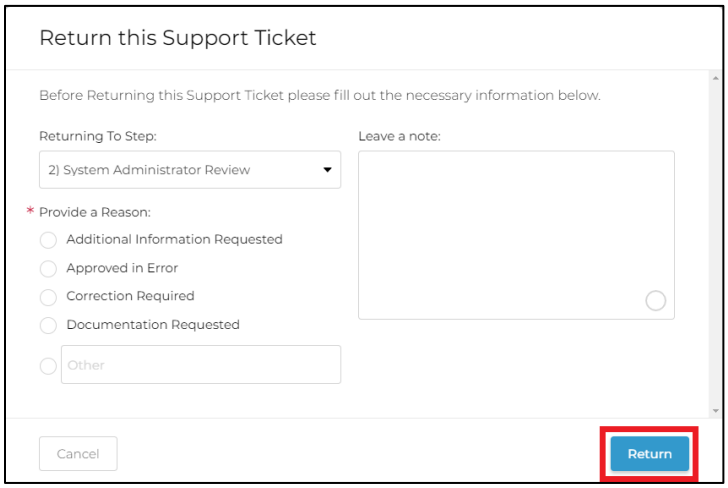
8. If the issue was resolved, leave a note that the issue was resolved and click the ***"Advance"*** button.



9. If the issue was not resolved, click the ***"Return"*** button, and return the Support Ticket to **Step 2**.



10. For **Returning to Step**, select ***"2) System Administrator Review"*** from the drop down menu. Select a ***"Reason,"*** and leave a note of why it is being returned. Click the ***"Return"*** button.



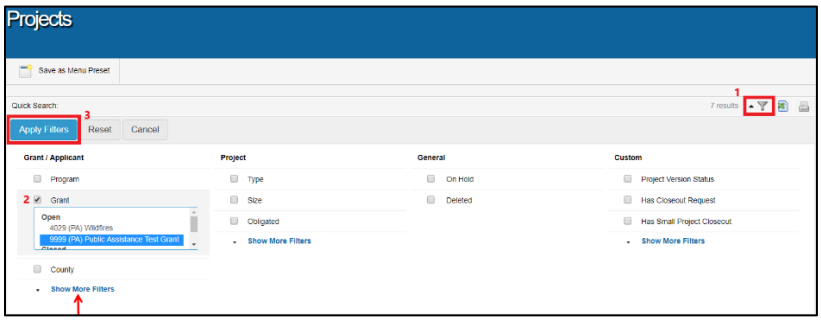
Apply Filters to a List

Accounts, Projects, and Finances each have a series of drop down items that include Requests, Forms, Listings, and Reports. These drop down items allow the user to quickly navigate to pre-defined list categories. These lists include interactive filters that allow the user to further refine the items that are returned in a particular list.

1. Click on the **Filter** icon (funnel) located on the top right of the list.

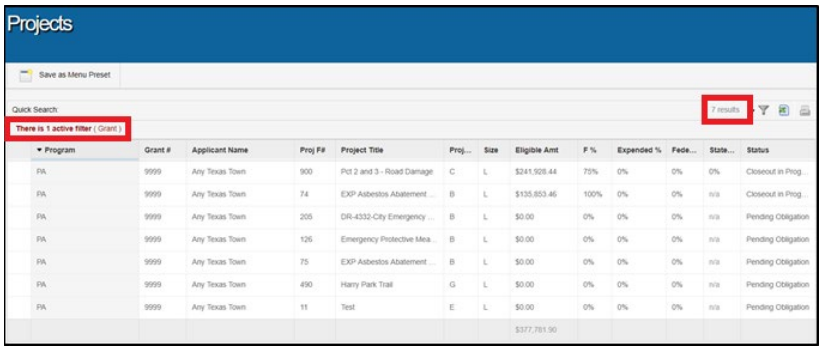
2. Click the check-box for the filter option(s) you would like to apply to the list, and then select the criteria for that option. Click on "***Show More Filters***" to reveal more options.

3. Once all the desired filter criteria have been selected, click the ***"Apply Filters"*** button located on the left of the Filter Form.



4. The filtered results will be displayed including the number of results, number of active filters, and the title(s) of the applied filters.

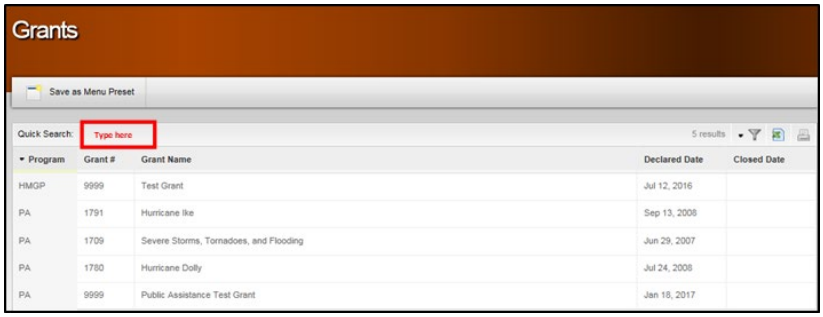
Note: *Remember that your list is filtered. To remove the filter click the filter icon again, and click the* ***"Reset"*** *tab. (See picture in Step 3 above)*



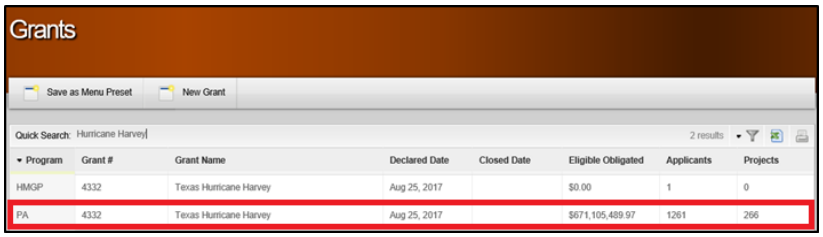
Quick Search on a List

The **Quick Search** will allow the user to find items on a list.

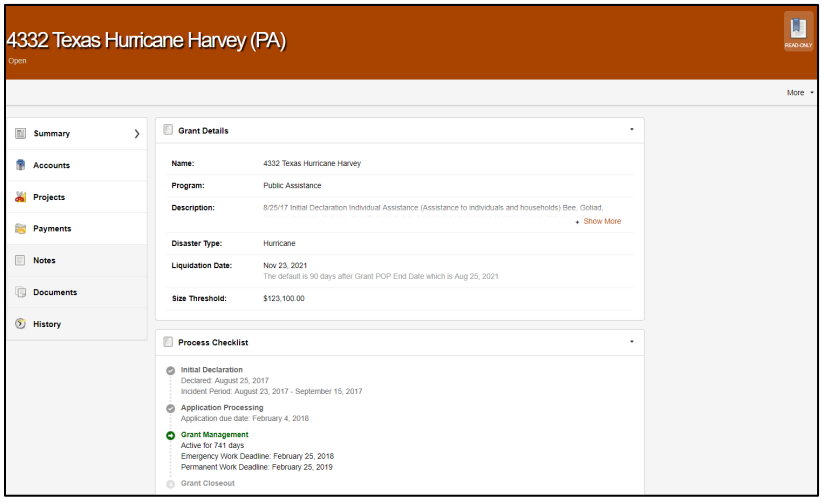
1. Click on the ***"Quick Search"*** field located on the left of the List Bar and start typing any search criteria relevant to the list. This is a dynamic search field which will filter the list while typing.



2. Once the search criteria is displayed, click on the item to be navigated.



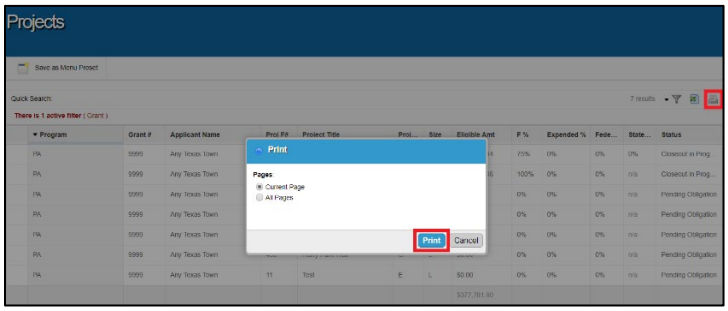
3. The ***"Quick Search"*** item will display.



Print a List

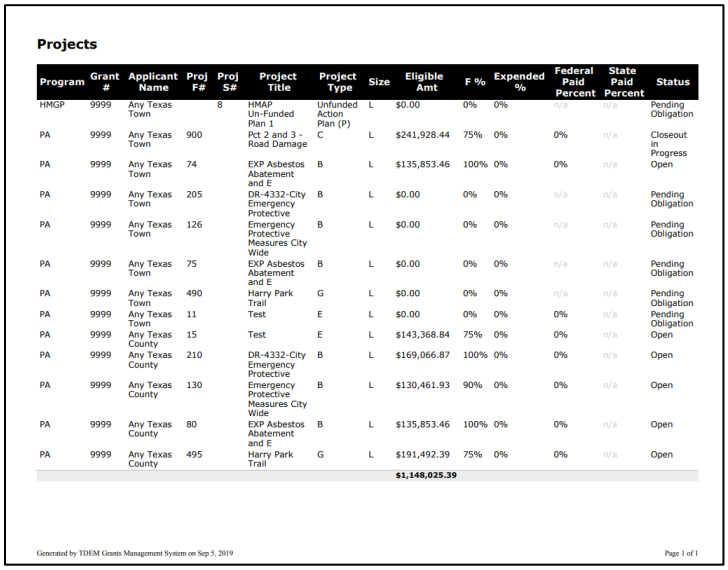
Every list in the system can be printed.

1. Click on the **Printer** icon on the top right of the list. The user has the option to print ***"Current Page"*** or ***"All Pages."*** Once the selection has been made click the ***"Print"*** button.



2. A notification will appear at the bottom of the screen. ***"Open"*** the file which contains the list to be printed.

3. The list is displayed in Portable Document Format (PDF), and ready to be printed. It can also be downloaded, and saved to a desired location.



Projects

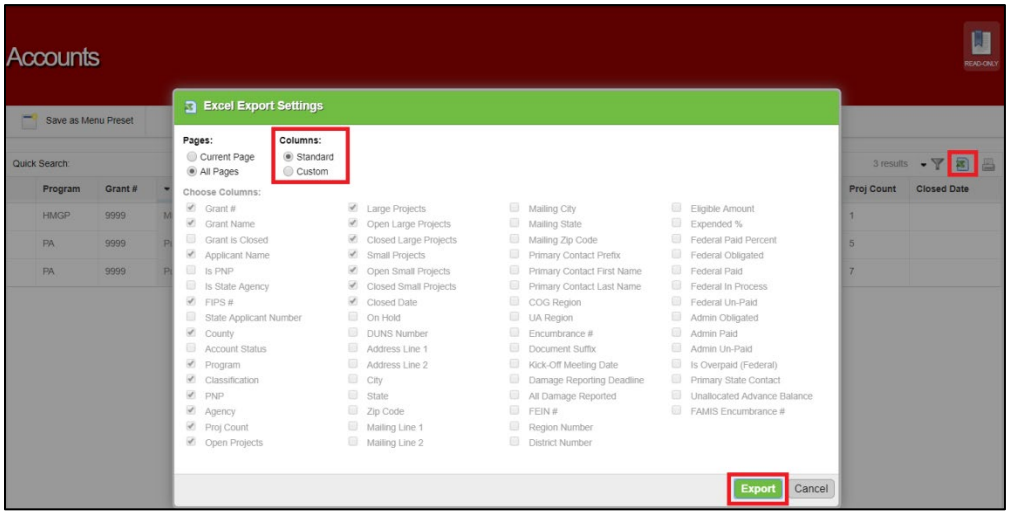
Program	Grant #	Applicant Name	Proj F#	Proj S#	Project Title	Project Type	Size	Eligible Amt	F %	Expended %	Federal Paid Percent	State Paid Percent	Status
HMGP	9999	Any Texas Town		8	HMAP Un-Funded Plan 1	Unfunded Action Plan (P)	L	$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	900		Pct 2 and 3 - Road Damage	C	L	$241,928.44	75%	0%	0%	n/a	Closeout in Progress
PA	9999	Any Texas Town	74		EXP Asbestos Abatement and E	B	L	$135,853.46	100%	0%	0%	n/a	Open
PA	9999	Any Texas Town	205		DR-4332-City Emergency Protective	B	L	$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	126		Emergency Protective Measures City Wide	B	L	$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	75		EXP Asbestos Abatement and E	B	L	$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	490		Harry Park Trail	G	L	$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	11		Test	E	L	$0.00	0%	0%	0%	n/a	Pending Obligation
PA	9999	Any Texas County	15		Test	E	L	$143,368.84	75%	0%	0%	n/a	Open
PA	9999	Any Texas County	210		DR-4332-City Emergency Protective	B	L	$169,066.87	100%	0%	0%	n/a	Open
PA	9999	Any Texas County	130		Emergency Protective Measures City Wide	B	L	$130,461.93	90%	0%	0%	n/a	Open
PA	9999	Any Texas County	80		EXP Asbestos Abatement and E	B	L	$135,853.46	100%	0%	0%	n/a	Open
PA	9999	Any Texas County	495		Harry Park Trail	G	L	$191,492.39	75%	0%	0%	n/a	Open
								$1,148,025.39					

Generated by TDEM Grants Management System on Sep 5, 2019 Page 1 of 1

Export Lists to Excel

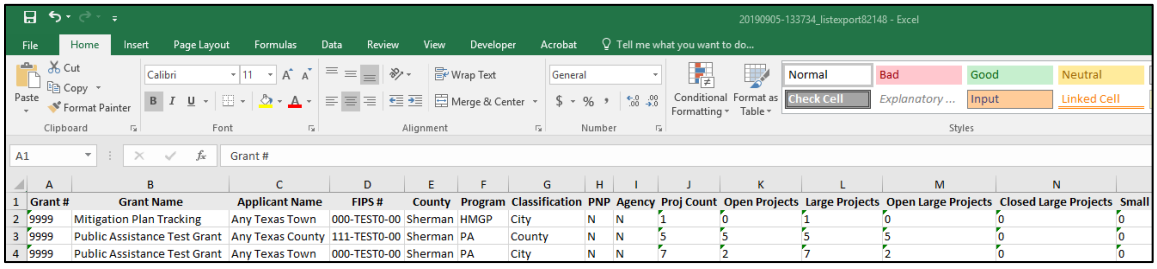
Every list in the system can be exported to Excel.

1. Click on the Excel icon on the top right of the list. The user will have the option to export the default columns, ***"Standard,"*** or export a ***"Custom"*** set of columns. If ***"Custom"*** is selected, click to select or deselect the desired columns. Next, click the ***"Export"*** button.



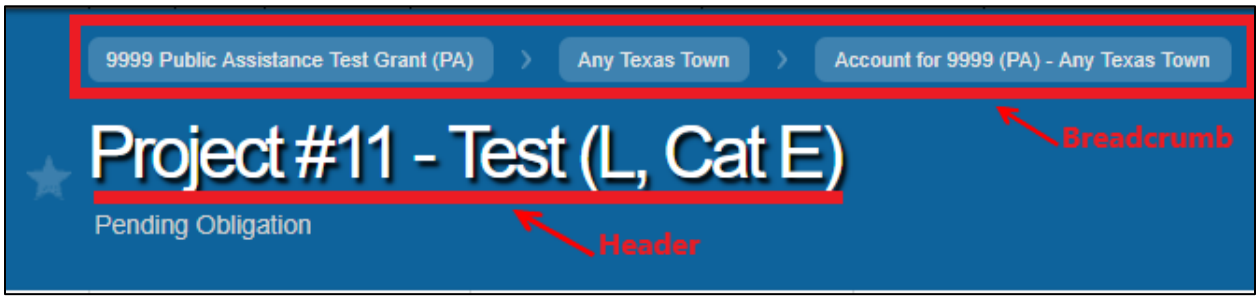
2. A message will appear at the bottom of the screen. ***"Open"*** the exported file.

3. The list is now visible in Excel. The file can be saved to a desired location.

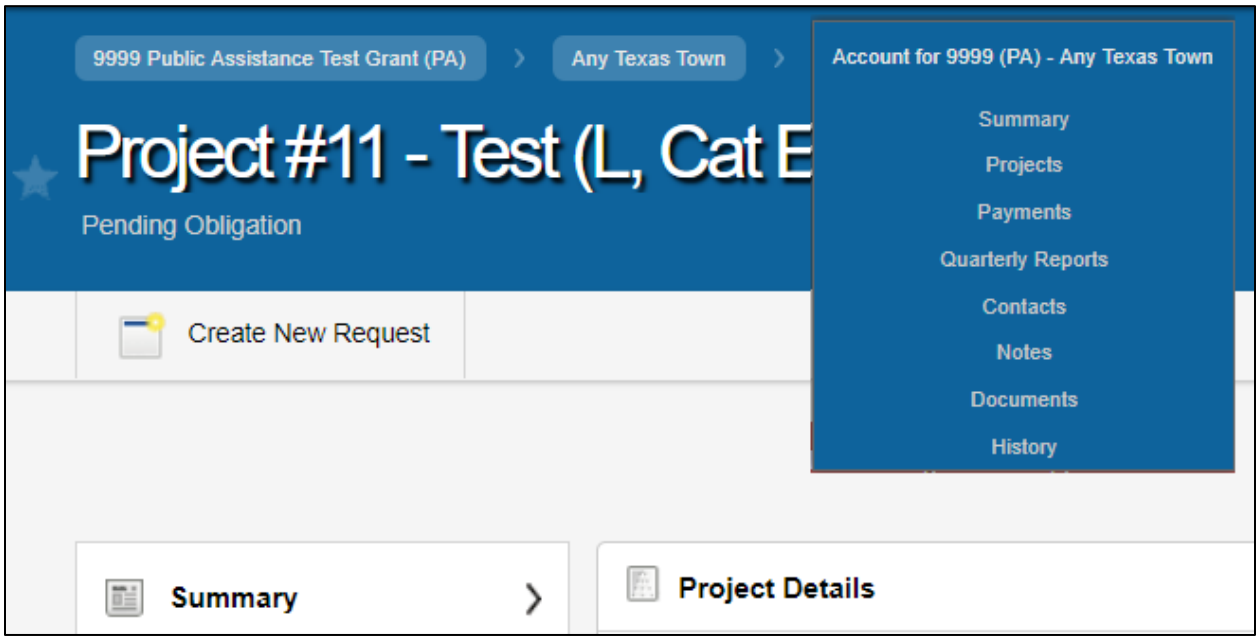


Header with Breadcrumb

In the banner, above the **Header**, you will find a **Breadcrumb** which shows the parents of the current item. **Breadcrumbs** show where you are and where you have been. For example, if you are on a Project-based request or item, you will see the Grant, Applicant, and Account in the **Breadcrumb**.



Navigate using the **Breadcrumbs** by hovering your mouse on the **Breadcrumb**, and a drop down box will appear. Click on the item to be navigated.

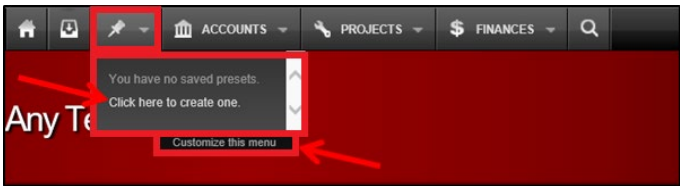


Create a Preset or Custom Menu

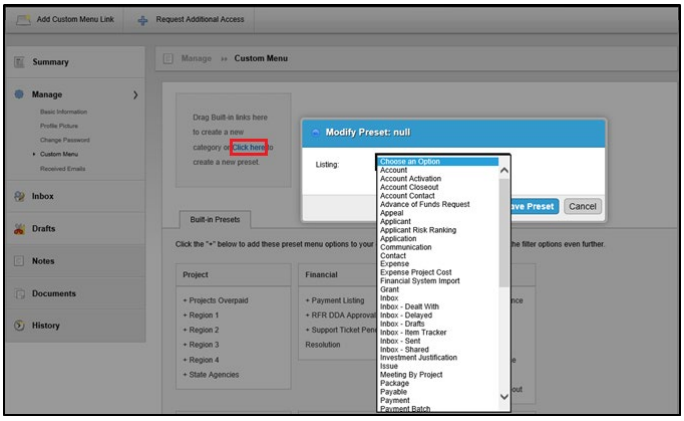
A **Preset** is a link to a listing with a saved set of filters. There are two ways to create new presets:

Method 1:

1. Navigate to the Custom Menu page found by clicking the **Saved Presets** *(thumbtack)* on the **Menu Bar**, and then ***"Click here to create one"*** link. Alternatively, if presets have already been created, click ***"Customize this menu."*** This will display the same **Custom Menu** page. In order for the ***"Customize this menu"*** to appear, hover inside the menu content area *(red square shown below)*.

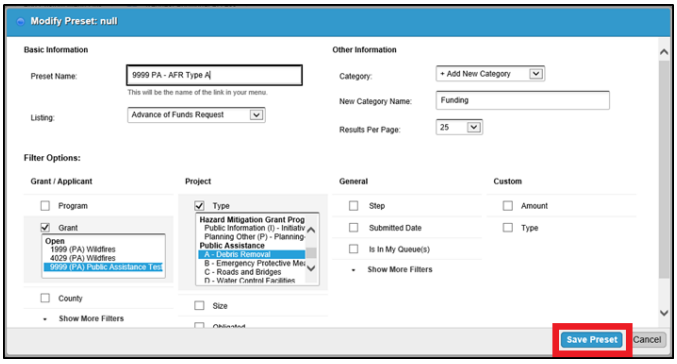


- At the Custom Menu page, click on the ***"Click here"*** link in the presets section. Select an item from the listing drop down menu.

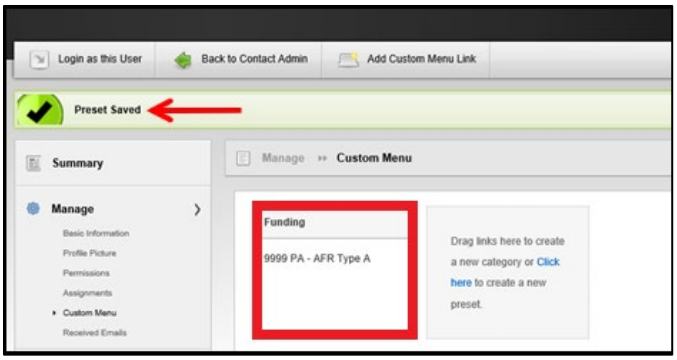


- A window will display with required fields. Enter the ***"Preset Name"*** *(create a name for the preset)*. Select ***"Category"*** from the drop down menu. The only option is ***"+ Add New Category"*** *(if this is the very first preset being created)*. Another red box will display to enter the ***"New Category Name."*** The number of desired results per page can be selected from the drop down menu. Check

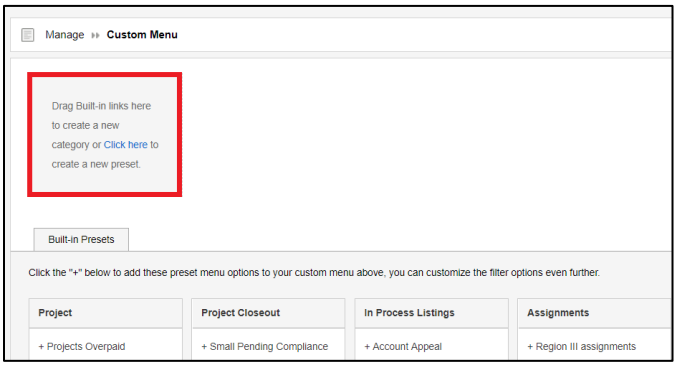
the boxes for the desired filter options, and then click the ***"Save Preset"*** button.



- A green check mark **Preset Saved** will appear briefly. This page has now been saved to the **Saved Presets/Custom Menu**.

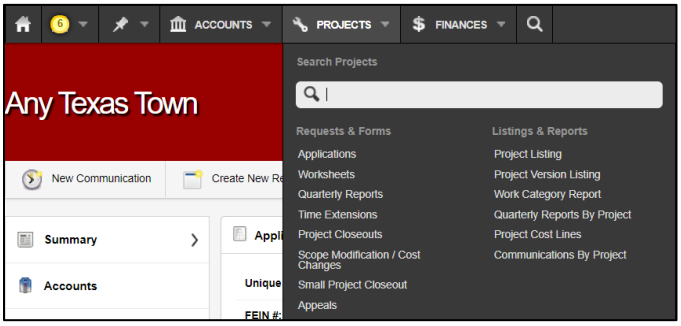


2. Presets can also be created by dragging a built in preset from the **"Built-in Presets"** section below to the preset area *(red square shown below)*. If you click on the plus signs next to the built-in presets, it will display a window to further customize the **Built-in Preset**.

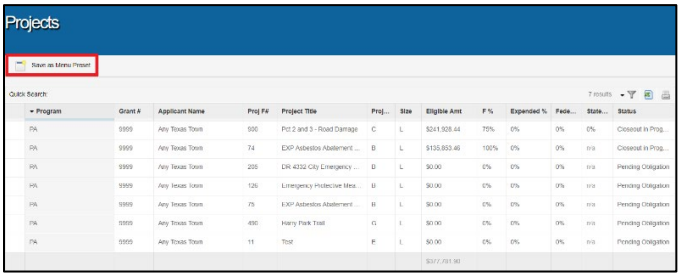


Method 2:

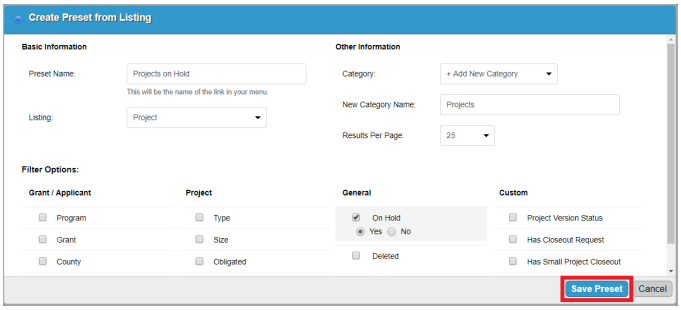
- Select one of the navigation tabs **(Accounts, Projects, or Finances)**, and generate the desired listing or report.



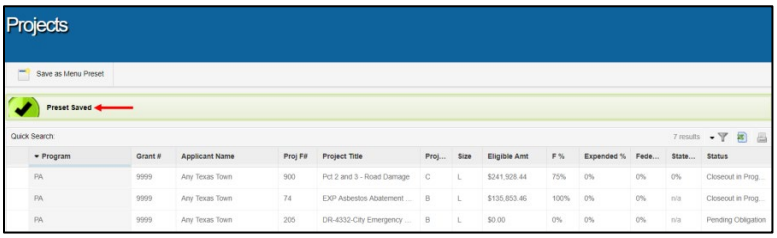
- Once the desired list is created, click on the ***"Save as Menu Preset"*** button on the Action Bar.



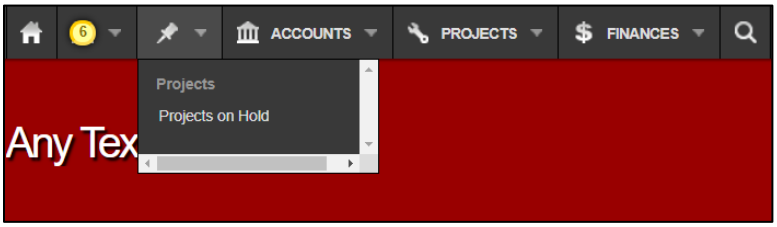
- The **Create Preset from Listing** window will appear. To build the preset, enter the ***"Preset Name,"*** select ***"+ Add New Category,"*** or select an existing category from the drop down menu. If selecting ***"+ Add New Category,"*** enter the ***"New Category Name,"*** select the number of results to be displayed per page, and apply the desired filters. Click the ***"Save Preset"*** button to save the Preset.



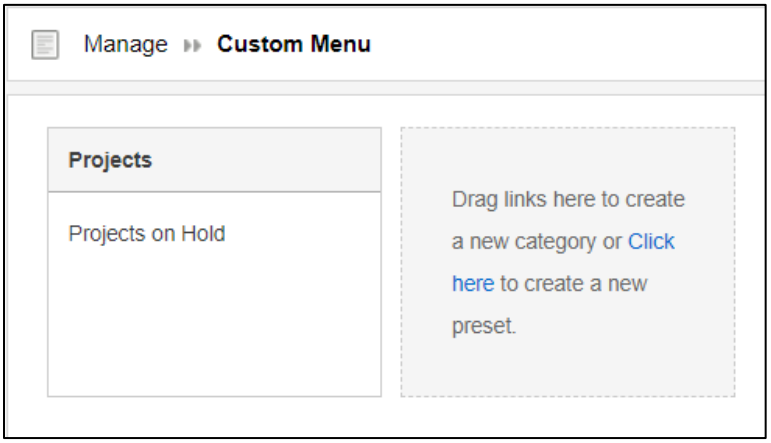
- A green check mark **“Preset Saved”** will appear briefly. This page has now been saved to the **Saved Presets/Custom Menu**.



Saved Presets



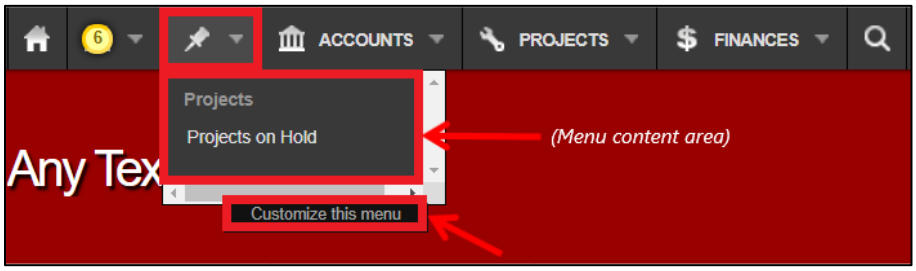
Custom Menu



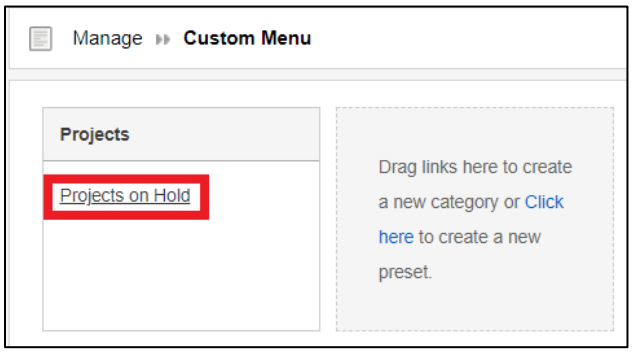
Edit or Delete a Preset

Edit a Preset

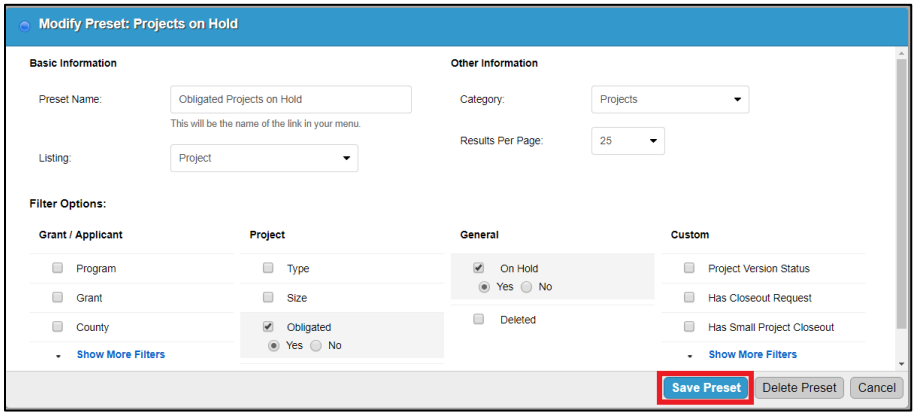
1. Open the **Preset Menu** *(thumbtack)* on the **Menu Bar**, and click on ***"Customize this menu"*** link. The link will appear by hovering inside the menu content area.



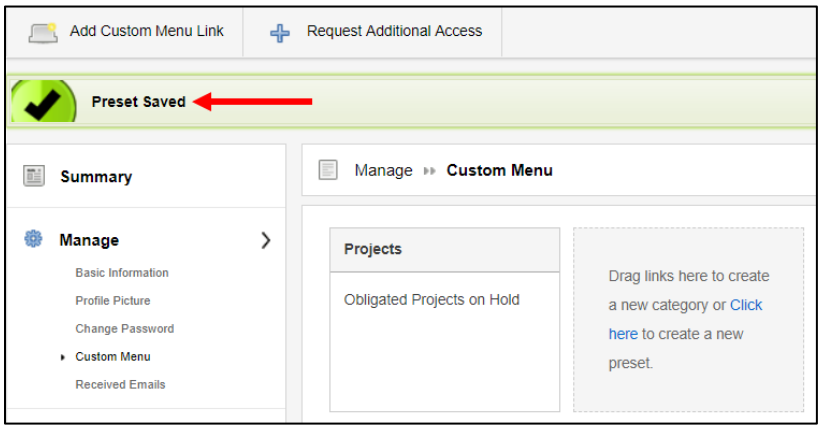
2. At the **Custom Menu** page, click on the link of the **Preset** to be edited.



3. Make changes to the filter options, and then click the ***"Save Preset"*** button. *(The Preset Name was also edited in the example below.)*

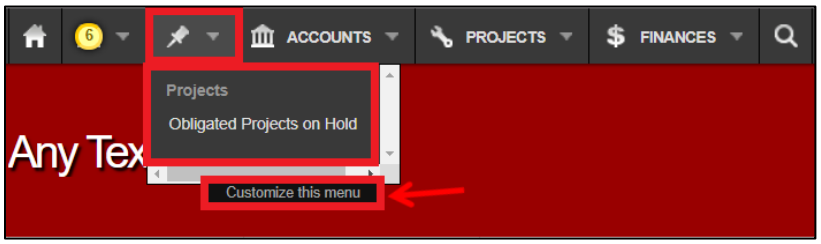


4. A green check mark **Preset Saved** will appear briefly. The edits have now been saved.

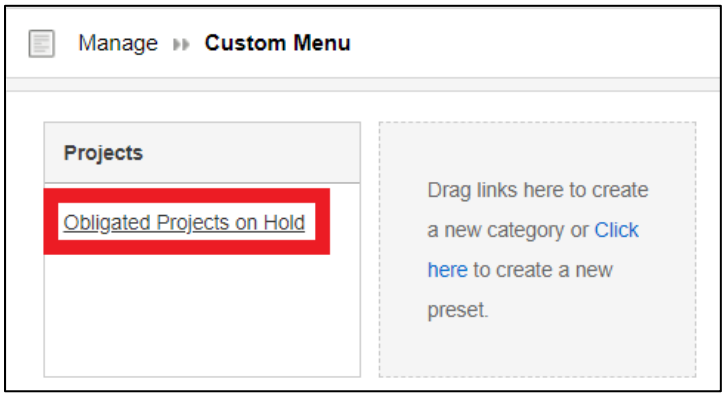


Delete a Preset

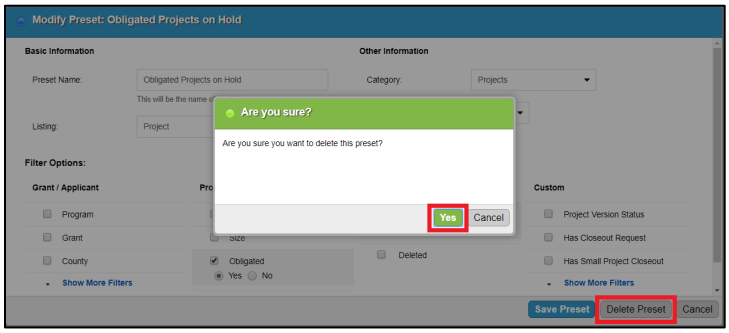
1. Open the **Preset Menu** *(thumbtack)* on the **Menu Bar**, and click on ***"Customize this menu"*** link. The link will appear by hovering inside the menu content area.



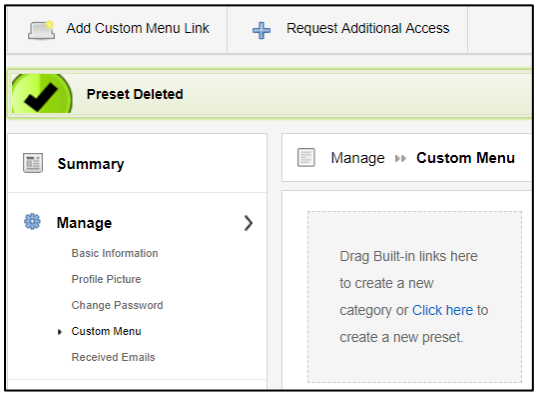
2. At the **Custom Menu** page, click the link of the **Preset** to be deleted.



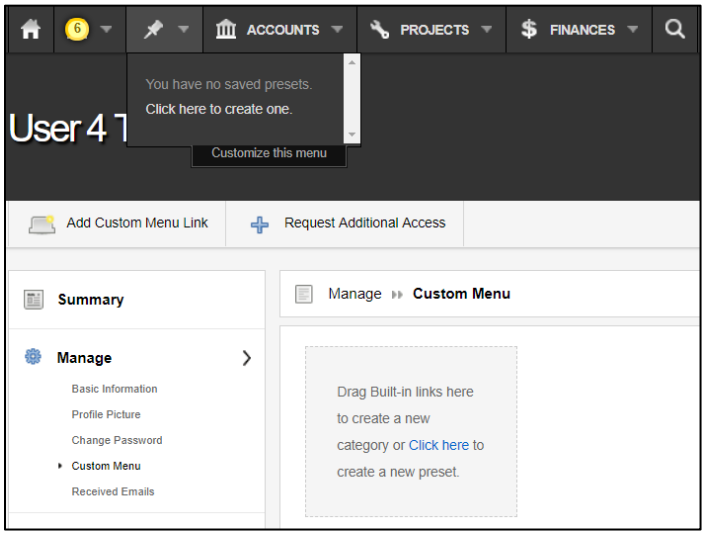
3. Click the ***"Delete Preset"*** button. A window will display asking **"Are you sure?"** *(Are you sure you want to delete this preset?)* Click the ***"Yes"*** button to delete.



4. A green check mark **Preset Deleted** will appear briefly.

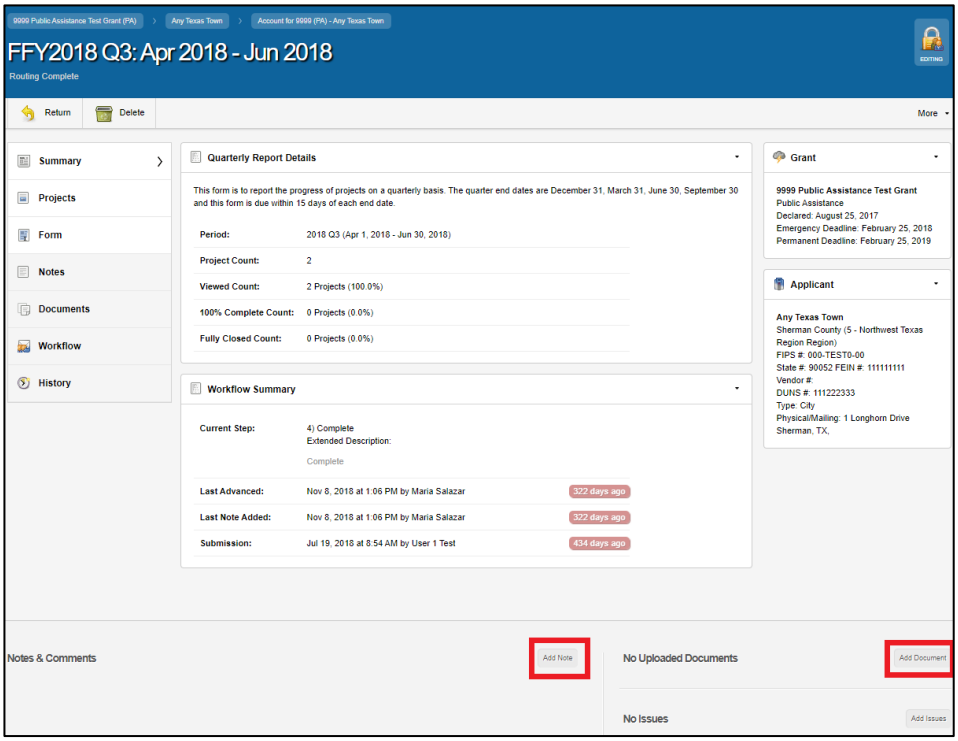


5. The preset has been removed from the **Preset Menu** *(thumbtack)*, and the **Custom Menu**.



Attach Documents or Add Notes

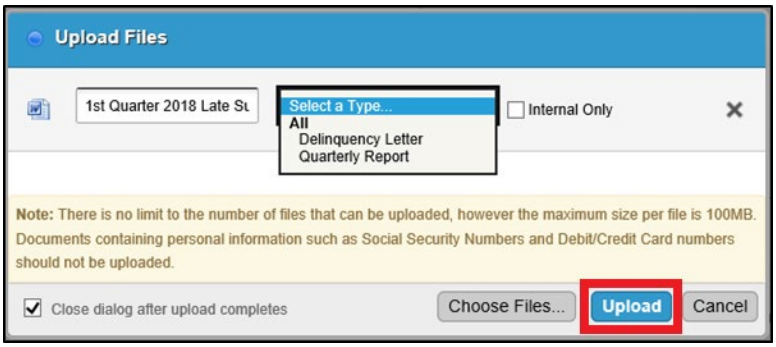
At the bottom of the screen there will be a section to Add Documents, or Add Notes & Comments. Click on your desired choice ***"Add Note"*** or ***"Add Document."*** If adding notes or documents, be sure to add them to their respective module/workflow.



Add/Attach/Upload Document

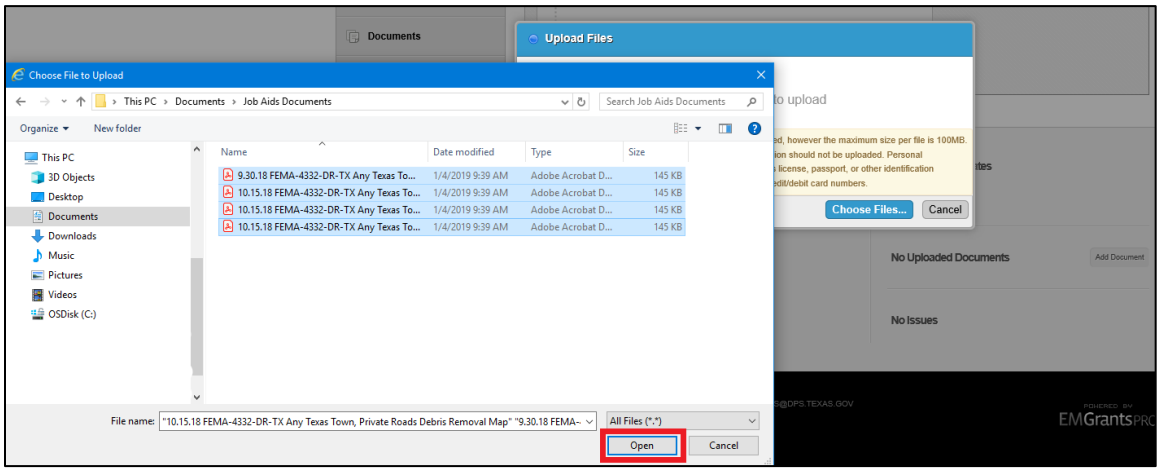
If you are attaching a document to a completed form, make sure to save the form to establish it in the system before uploading supporting documents.

Click the ***"Add Document"*** button. Click the ***"Choose Files"*** button to select the document to be uploaded, and then select the type of document from the drop down menu. The selection types in the drop down menu will vary depending on the module/workflow where the document is being uploaded. Click the ***"Upload"*** button to upload the document.

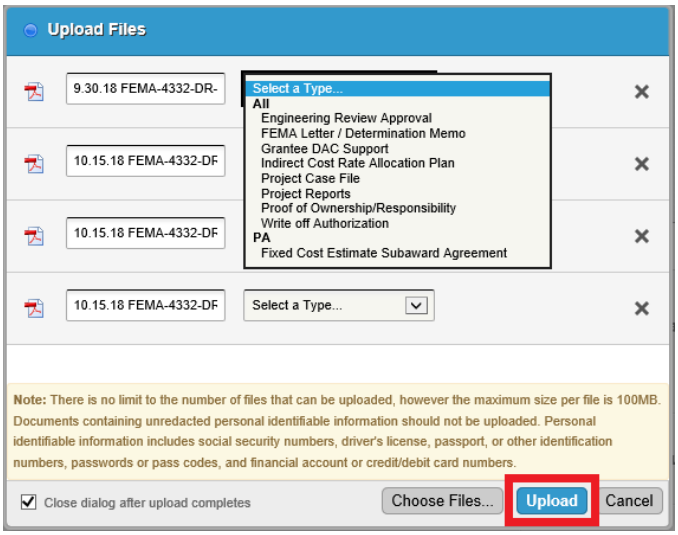


Add/Attach/Upload Multiple Documents

Multiple documents can be uploaded at once instead of uploading each one individually. They do not need to be the same type of document either. Click the ***"Add Document"*** button. Click the ***"Choose Files"*** button to select the documents to be uploaded. Hold down the Ctrl button on your key board to select the documents you wish to upload. Click the ***"Open"*** button.

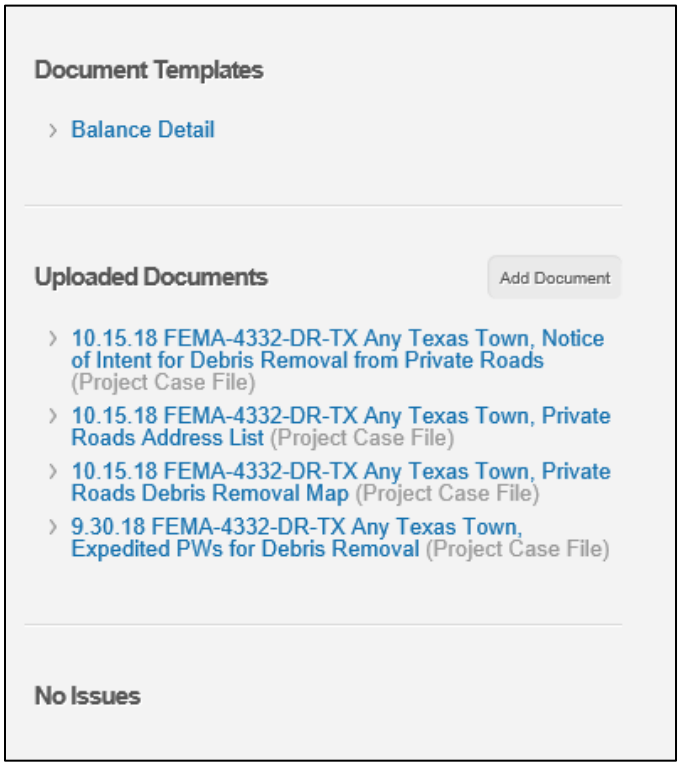


Select the type of document from the drop down menu for each of the documents being uploaded. The selection types in the drop down menu will vary depending on the module/workflow where the documents are being uploaded. Click the ***"Upload"*** button to upload the documents.



The uploaded documents are listed under the **Uploaded Documents** section at the bottom right of the screen.

Note: *Only the 10 most recent documents will be visible at the bottom of the page. You can always click on the Documents tab to view other documents.*

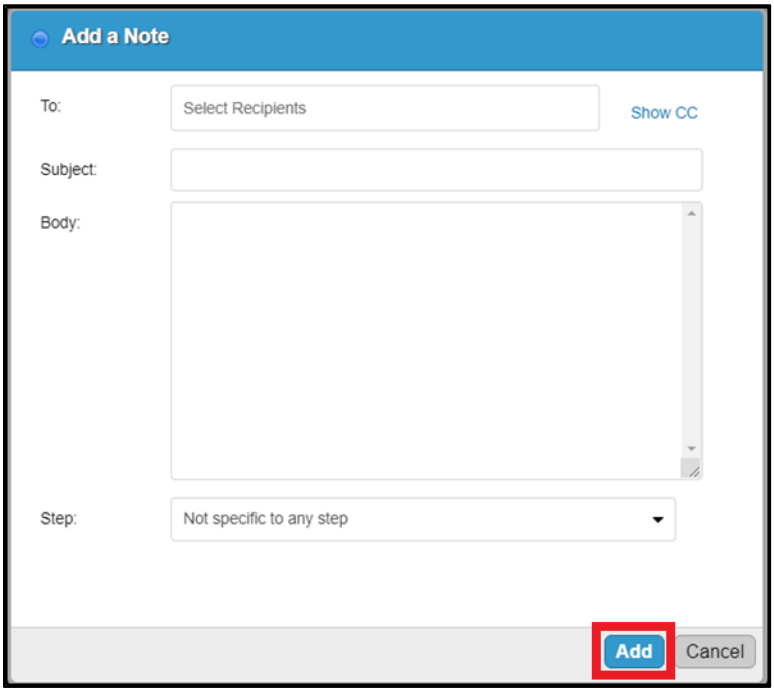


Add/Attach Notes & Comments

Click the ***"Add Note"*** button, and complete the short form that will display. If adding notes, be sure to add them to their respective module/workflow.

1) ***To:*** Type the recipient's name *(names will begin to appear dynamically).*
2) ***Subject:*** Enter a subject.
3) ***Body:*** Add a note or comment.
4) ***Step:*** Select which step the note/comment is pertaining to, or not specific to any step from the drop down menu. The ***Step*** option may not appear; it depends on the module/workflow.

Click the ***"Add"*** button to add the note/comment.



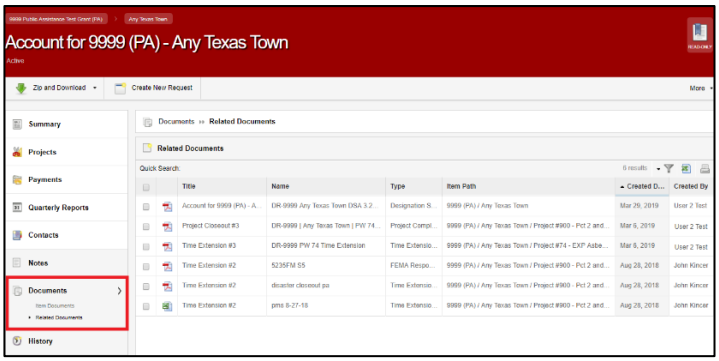
View, Edit, Delete, Move, or Link Documents

Navigate to the desired **Account** to view the documents. Click ***"Documents"*** then ***"Related Documents"*** to view the documents. **Item Documents** are documents pertaining to a specific module/workflow, and **Related Documents** are all documents uploaded for that particular account (includes all account workflows).

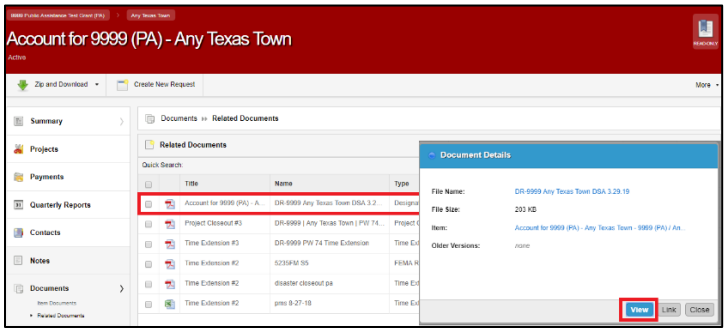
Note: *You may not be able to edit, delete, move, or link a document. These actions are permission based.*

View Document

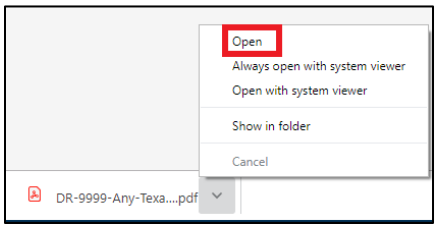
1. Click the ***"Documents"*** tab on the left hand menu. Then click on either ***"Item Documents"*** or ***"Related Documents."***



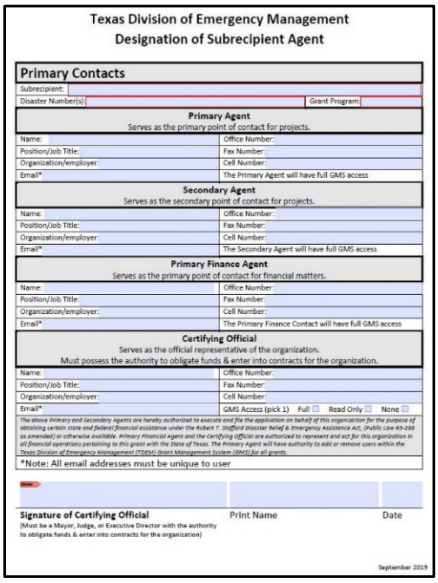
2. Click on the line that contains the document that you wish to view *(lines are hyperlinked)*. When the **Document Details** window appears, click the blue ***"View"*** button.



3. ***"Open"*** the file. The following example is from Google Chrome, and the notification will display at the bottom left hand corner.



4. The form is now visible.



Texas Division of Emergency Management
Designation of Subrecipient Agent

Primary Contacts

Subrecipient:
Disaster Number(s):
Grant Program:

Primary Agent
Serves as the primary point of contact for projects.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	The Primary Agent will have full GMS access

Secondary Agent
Serves as the secondary point of contact for projects.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	The Secondary Agent will have full GMS access

Primary Finance Agent
Serves as the primary point of contact for financial matters.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	The Primary Finance Contact will have full GMS access

Certifying Official
Serves as the official representative of the organization.
Must possess the authority to obligate funds & enter into contracts for the organization.

Name:	Office Number:
Position/Job Title:	Fax Number:
Organization/employer:	Cell Number:
Email*	GMS Access (pick 1) Full ☐ Read Only ☐ None ☐

The above Primary and Secondary Agents are hereby authorized to execute and file the application on behalf of this organization for the purpose of obtaining certain state and federal financial assistance under the Robert T. Stafford Disaster Relief & Emergency Assistance Act, (Public Law 93-288 as amended) or otherwise available. Primary Financial Agent and the Certifying Official are authorized to represent and act for this organization in all financial operations pertaining to this grant with the State of Texas. The Primary Agent will have authority to add or remove users within the Texas Division of Emergency Management (TDEM) Grant Management System (GMS) for all grants.

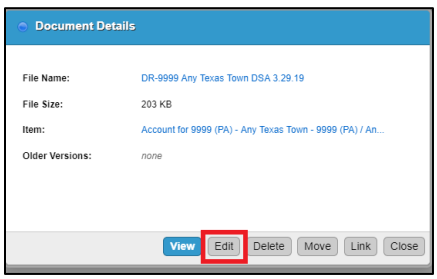
*Note: All email addresses must be unique to user

Signature of Certifying Official (Must be a Mayor, Judge, or Executive Director with the authority to obligate funds & enter into contracts for the organization) | Print Name | Date

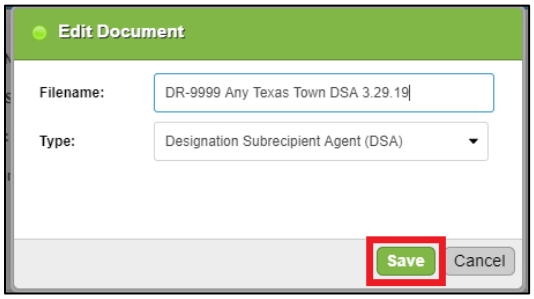
September 2019

Edit Document

1. Navigate to ***"Item Documents"*** of the desired workflow. Click the document to be edited. Click the ***"Edit"*** button.

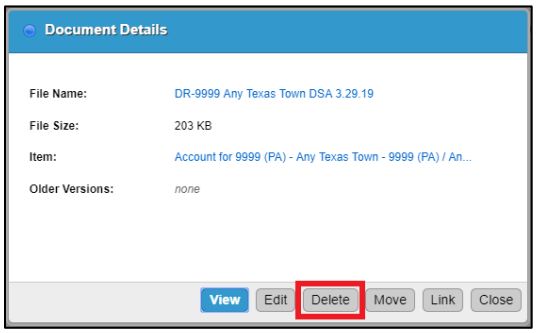


2. The **Filename** can be edited, and also the **Type** can be changed by making a different selection from the drop down menu. Click the ***"Save"*** button after you have made changes.

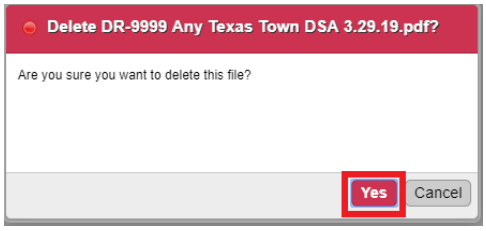


Delete Document

1. Navigate to ***"Item Documents"*** of the desired workflow. Click on the document to be deleted. Click the ***"Delete"*** button.

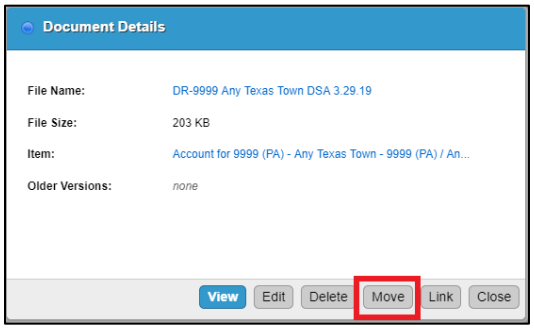


2. The following window will appear asking you if you are sure that you want to delete the file. Click the ***"Yes"*** button if you are certain that you want to delete the document.

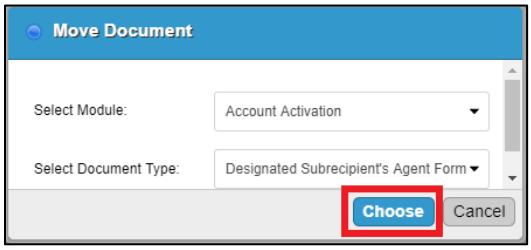


Move Document

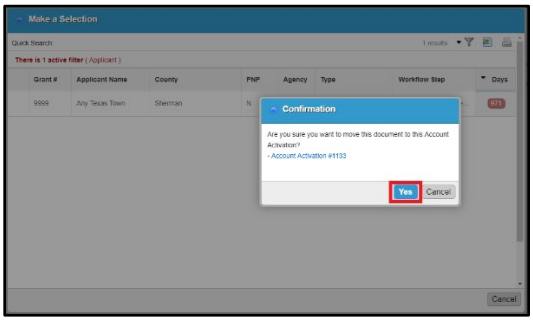
1. Navigate to ***"Item Documents"*** of the desired workflow. Click on the document to be moved. Click the ***"Move"*** button.



2. ***"Select Module"*** from the drop down menu of where the document will be moved. ***"Select Document Type,"*** if a new document type is needed. Once the selections have been made, click the ***"Choose"*** button.

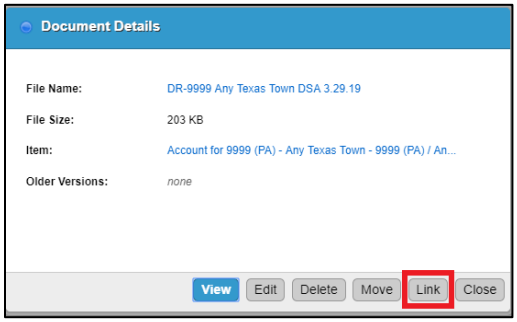


3. The following screen will appear asking you to **Make a Selection**. Click the line that contains the new desired location. A window will display to confirm the move. Click the ***"Yes"*** button.

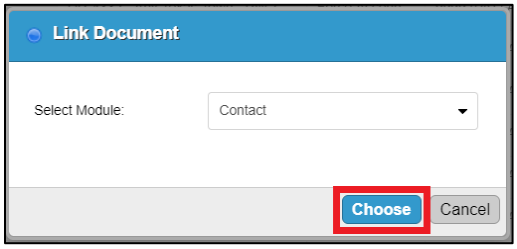


Link Document

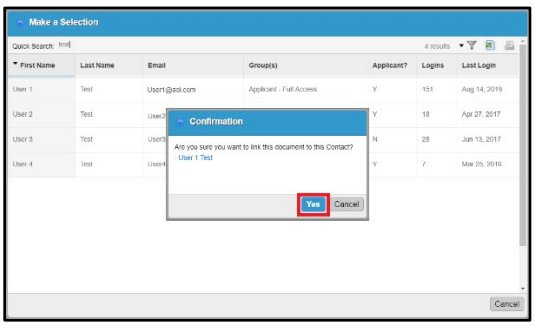
1. Navigate to ***"Item Documents"*** or ***"Related Documents"*** then click on the desired document to be linked. Click the ***"Link"*** button. For example, you may want to use the **Link** document feature if a Designation of Subrecipient Agent (DSA) form will apply to multiple Account Activations. Make sure that each disaster number is listed on the top of the DSA, and also include the disaster numbers in the name of the document.



2. ***"Select Module"*** from the drop down menu. After you have made your selection, click the ***"Choose"*** button.

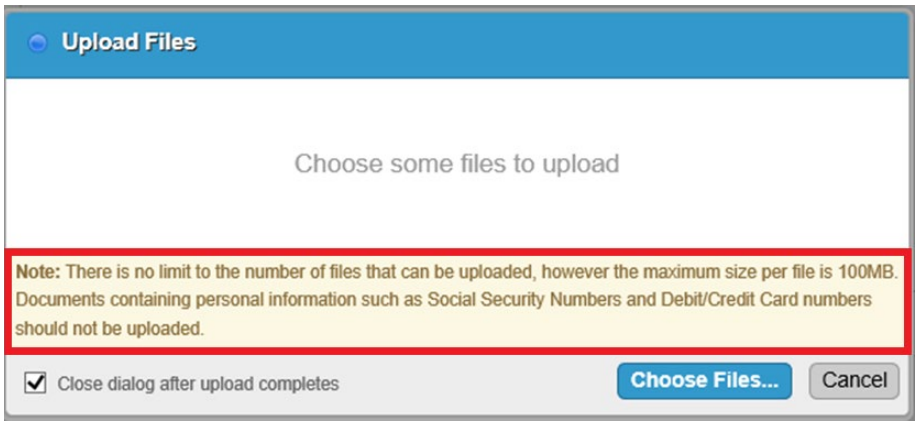


3. The following screen will appear asking you to **Make a Selection**. Click the line that contains the desired item. A window will display to confirm the link. Click the ***"Yes"*** button.

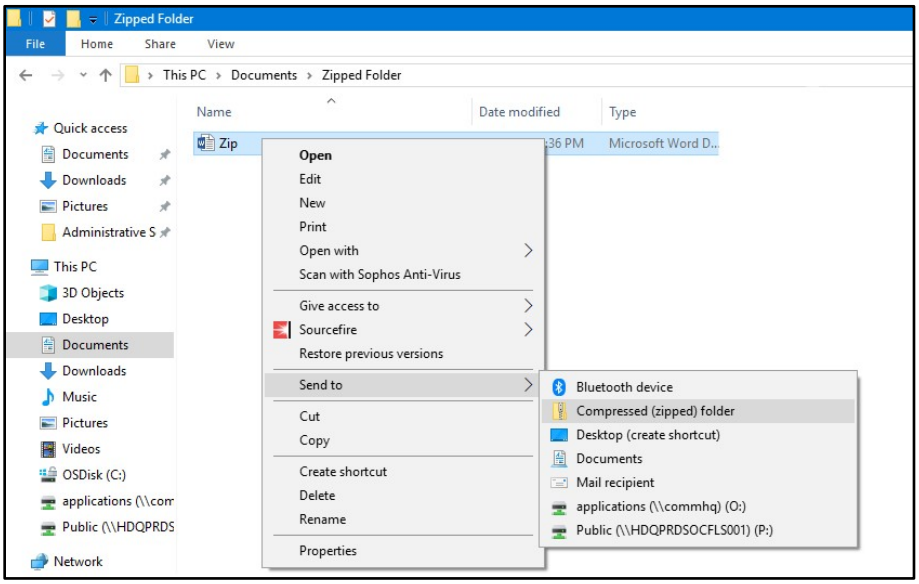


Zip a Large File

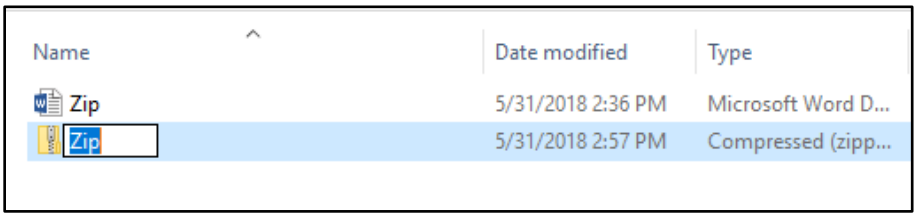
1. The maximum size for a document to be uploaded to the Grants Management System is 100MB. To upload a file that is larger than 100MB, zip the file before uploading it.



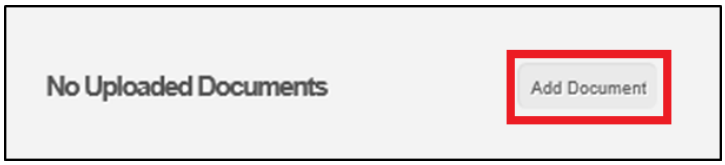
2. Go to File Explorer to locate the document to be zipped. Right click on the file, select ***"Send to,"*** and then on ***"Compressed (zipped) folder."***



3. The file has been zipped, and will need to be named. The original name of the unzipped file will be the default name for the zipped file also. The zipped file can be renamed, or hit enter to keep the default name.

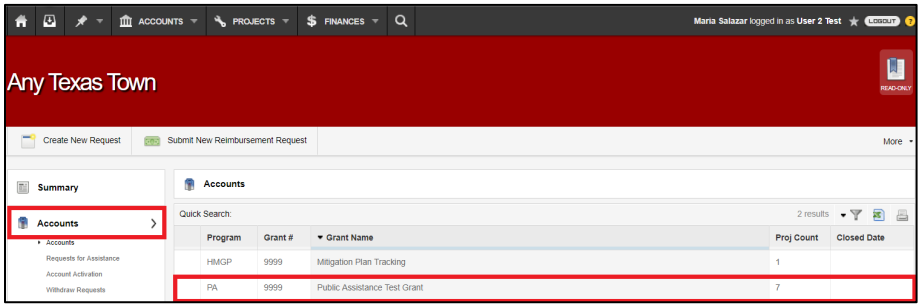


4. The zipped file can now be uploaded. Click on the ***"Add Document"*** button to upload it.



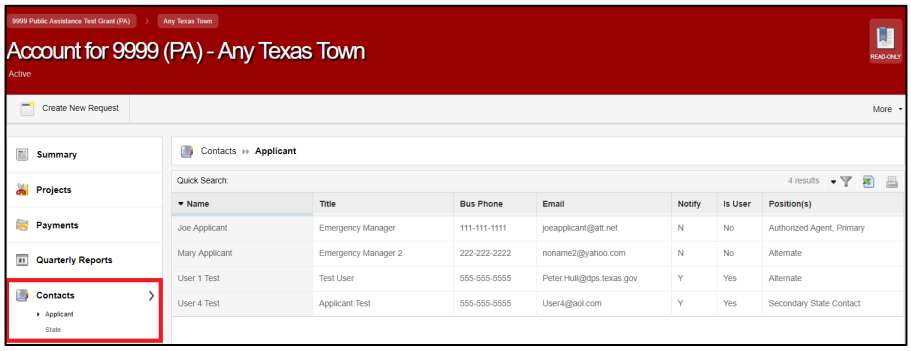
View Your Contacts

1. From your **Home** screen, click the ***"Accounts"*** tab on the side menu to bring up a list of Accounts for your entity. *If you are a contact for multiple Applicants, you must select an Applicant first.* Select an Account to view the contacts. If you select ***"Contacts"*** from the home screen, it will display all contacts for all accounts for your entity. You may have different contacts for different accounts that is why it is important that you go into each account to view the contacts for that particular account.



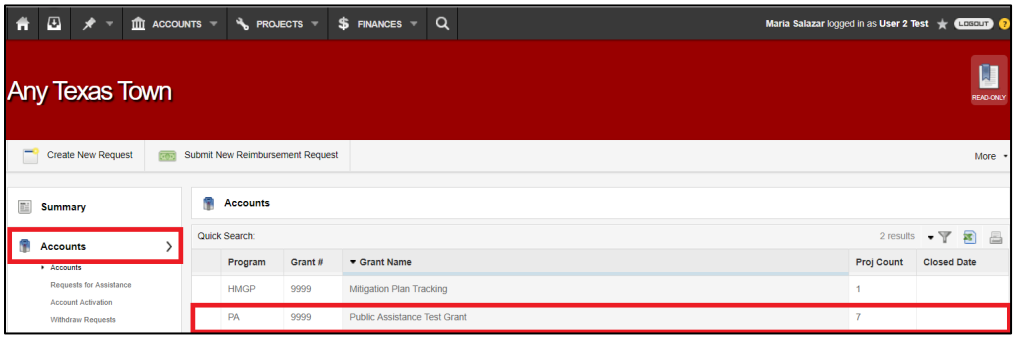
2. Click on ***"Contacts,"*** and the Applicant *(your)* contacts will display. If you need to update your contacts, complete a Designation of Subrecipient Agent (DSA) form found at https://grants.tdem.texas.gov/site/Forms.cfm. The form will be located under **Common Forms**. Submit a Support Ticket and attach the completed form or email it to TDEM.GMS@tdem.texas.gov.

Note: *Periodically go into GMS to review your contacts. Submit a support ticket to request removal of contacts that are no longer employed by your entity, or contractors that no longer require access.*

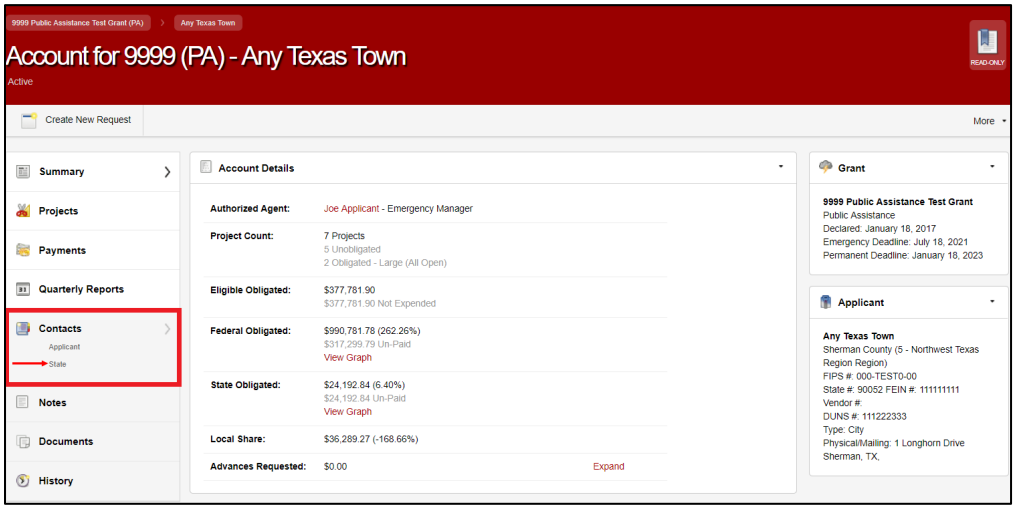


Locate State Contacts

1. From your **Home** screen, click the ***"Accounts"*** tab on the side menu to bring up a list of Accounts for your entity. *If you are a contact for multiple Applicants, you must select an Applicant first.* Select an Account to view the State Contacts.

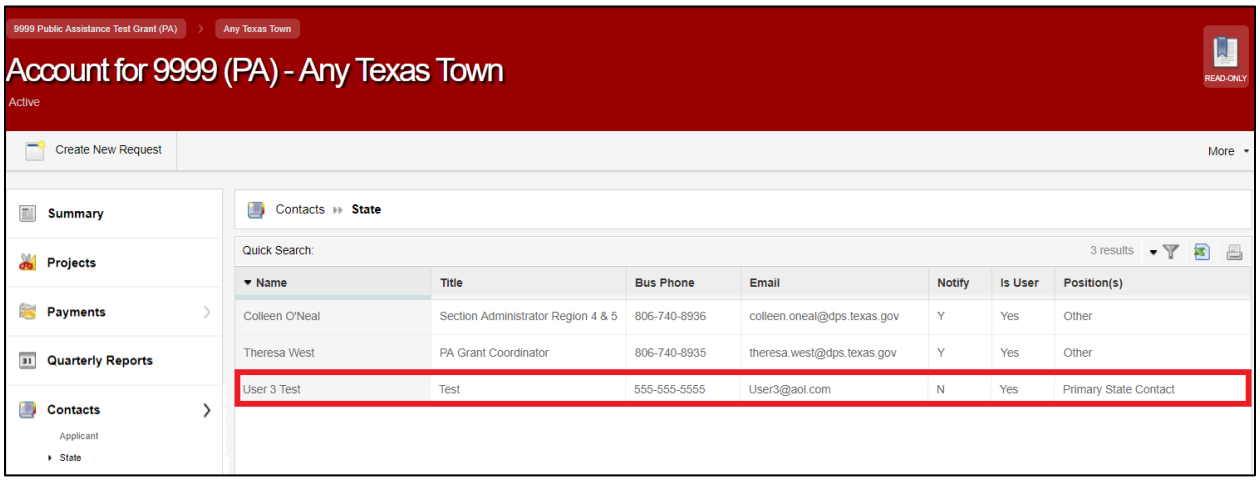


2. Click ***"Contacts,"*** and then ***"State"*** to bring up the state contacts.



3. Look at the last column, **Positions(s)**, for Primary State Contact. The **Primary State Contact** will be your point of contact with the State, and can be reached via phone or email.

Note: *If the entire email address is not visible because it is too long, hover your mouse over the email address. The entire email address will display in a small box. You can also drag the top of the column to the right to view the full email address.*

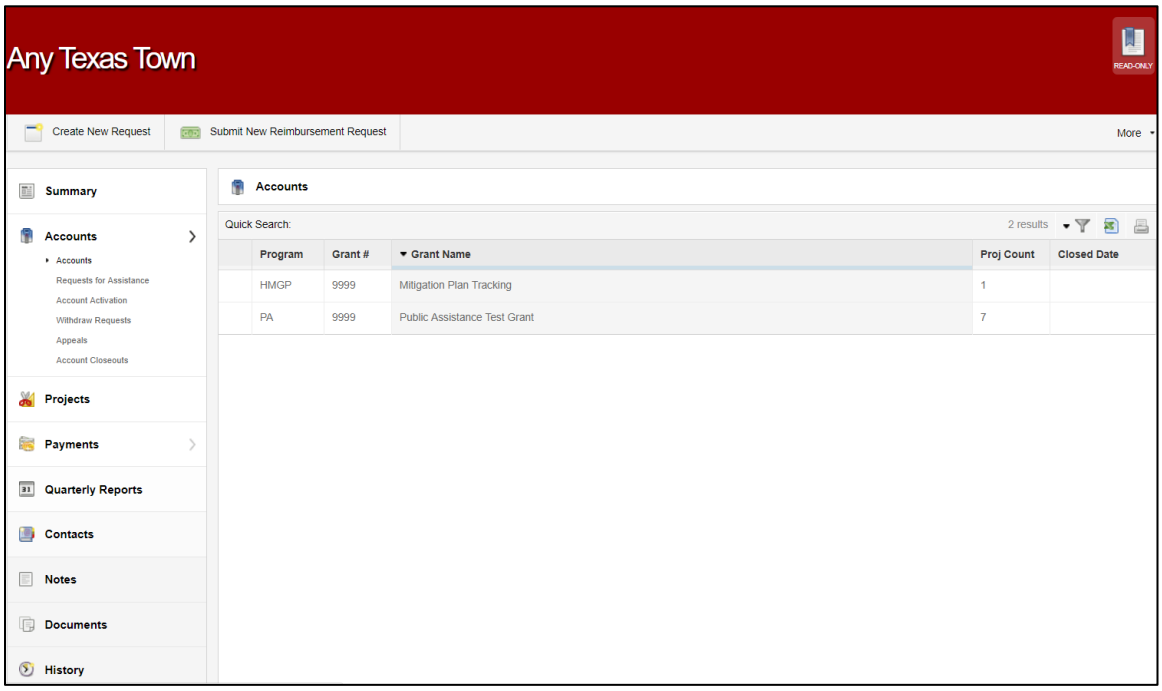


Accounts

What is an Account?

Applicant + Grant = Account

Grants can be both disaster and non-disaster grants. An Applicant can have multiple accounts. *(Account for Public Assistance (PA), Account for Hazard Mitigation (HM), etc.)*



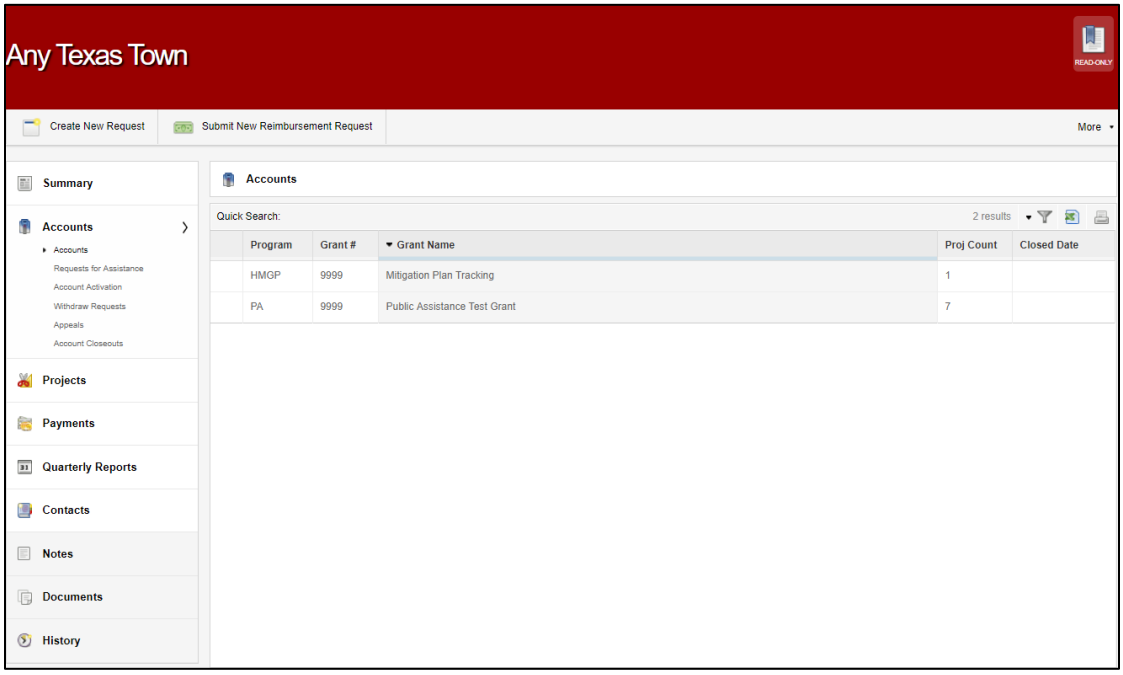
Create an Account

The Applicant does not create an Account. The creation of a grant account is dependent on the grant program.

- Public Assistance accounts are created in the Grants Management System (GMS) when a Request for Public Assistance (RPA) is imported from the FEMA Grants Portal, https://grantee.fema.gov/#applicants/subrecipient.

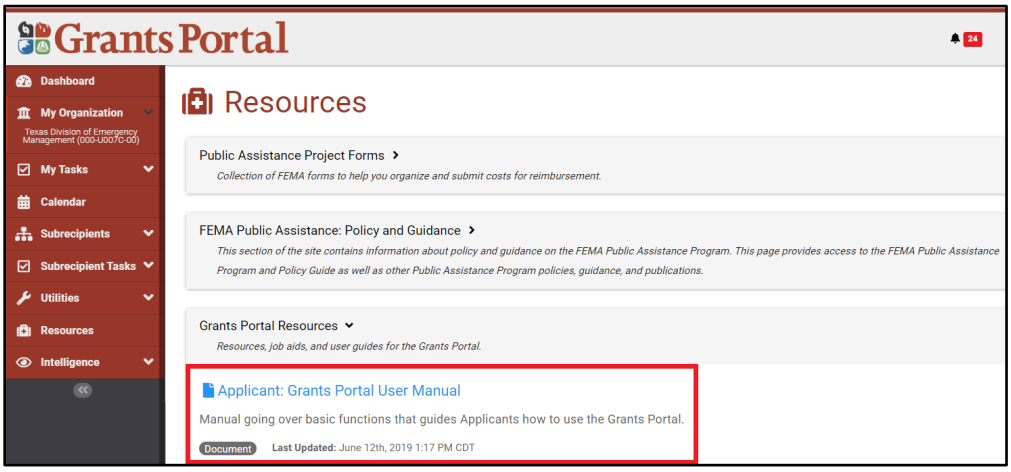
- Fire Management Assistance grant accounts are created in GMS when an applicant submits a Request for Fire Management Assistance (RFMA) for the grant program on behalf of their municipality, city, county, private nonprofit, etc.

- Hazard Mitigation and Pre-Disaster Mitigation grant accounts are created when an applicant submits a grant application in GMS on behalf of their municipality, city, county, private nonprofit, etc.



Submit Request for Public Assistance (RPA)

1. You will need to go to the FEMA Grants Portal to submit a Request for Public Assistance (RPA). Go to https://grantee.fema.gov/#resources, and look under Grants Portal Resources to download the most current version of the "Applicant: Grants Portal User Manual."



2. If your organization has never submitted an RPA, or no one in your organization has access to the Grants Portal, you will need to send an email to TDEMRecovery.rpa@tdem.texas.gov to request that an invitation be sent to you to access the Grants Portal.

3. Complete the information requested on the Request for Public Assistance screens. If your organization is not in the Grants Portal, you may need to register your organization first.
   Helpful Tips for entering new Applicant Names:

   - *Use the name that is on sam.gov (if organization is on sam.gov)*
   - *Enter only name of city; not City of ____. If the Applicant's name has Town of or Village of before the name, type in the name first, enter a comma, and then the prefix. (See following examples)*

Applicant Name	*Enter Name*
City of Any	*Any*
Unique City	*Unique City*
Town of Many	*Many, Town of*
Village of Several	*Several, Village of*
Cute Village	*Cute Village*

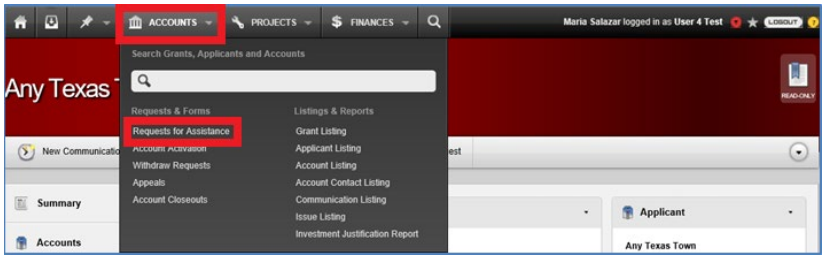
- *Do not abbreviate names: Any Texas Town ISD should be entered as Any Town Independent School District (ISD)*
- *Abbreviate number with the # sign: Any Texas County Municipal Utility District #1, Any Texas County Municipal Utility District #2, etc.*
- *If the Applicant is known by an acronym, spell out the name first and then put the acronym in parentheses: TDEM should be entered as Texas Division of Emergency Management (TDEM)*
- *If an Applicant has "The" as a prefix enter it at the end of the name separated by a comma: The Texas Town Food Bank should be entered as Texas Town Food Bank, The*
- *Do not use periods in the name: St. Mark Hospital should be entered as St Mark Hospital*

4. **For Private Non-Profit (PNP) Applicants only:** Prior to submitting an RPA for a PNP, have the following <u>required</u> documents ready. You will not be able to proceed without the requested documents.

    a. PNP Facility Questionnaire
    b. Copy of Tax Exemption Certificate. *(Ruling letter from the U.S. Internal Revenue Service granting tax exemption or State certification stating the entity is a nonprofit. The sales tax exemption certificate cannot be used to meet this requirement.)*
    c. Organization Charter, Articles of Incorporation, or By-Laws
    d. Information on accreditation or certification *(school or educational facility only)*
    e. Insurance policy
    f. Proof of Ownership or Lease Agreement

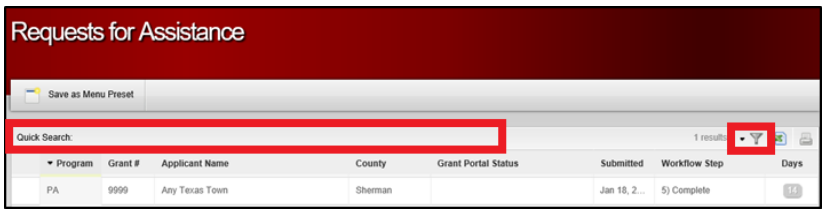
Find an Existing Request for Public Assistance (RPA)

1. Click the ***"Accounts"*** menu on the **Main Menu** bar, and then click ***"Requests for Assistance"*** under the **Requests & Forms** section of the menu.



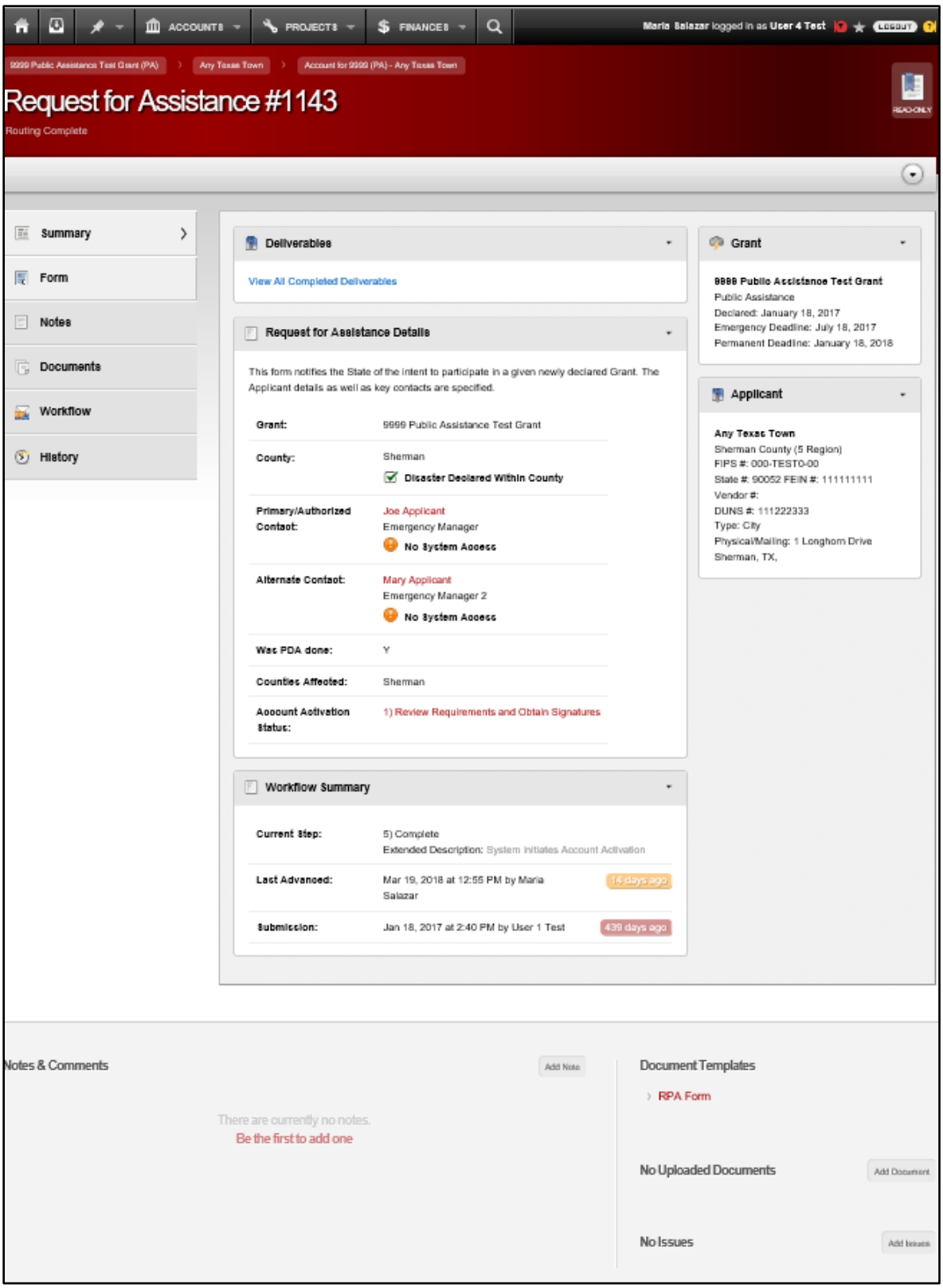
2. A list of **RPAs** for the Applicant you represent will show up in list form.

3. If you are assigned to multiple Accounts, use the ***"Quick Search"*** or ***"Filter"*** *(funnel icon)* option to locate the desired request from the list of RPAs that is produced.



4. Once located, click on the desired grant and the system will navigate to the requested form.

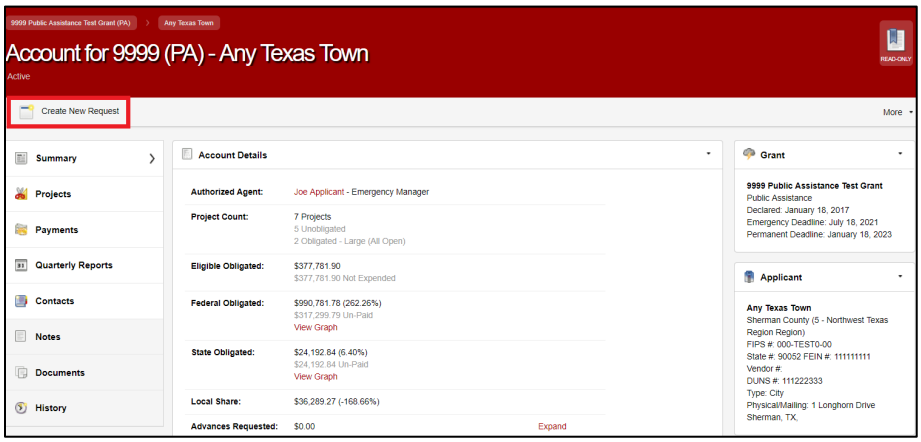
5. The details of the **Request for Public Assistance (RPA)** will display.


ACCOUNTS
PROJECTS
FINANCES
Maria Salazar logged in as User 4 Test
LOGOUT
9999 Public Assistance Test Grant (PA)
Any Texas Town
Account for 9999 (PA) - Any Texas Town
Request for Assistance #1143
Routing Complete
READ-ONLY
Summary
Form
Notes
Documents
Workflow
History
Deliverables
View All Completed Deliverables
Request for Assistance Details
This form notifies the State of the intent to participate in a given newly declared Grant. The Applicant details as well as key contacts are specified.
Grant: 9999 Public Assistance Test Grant
County: Sherman
Disaster Declared Within County
Primary/Authorized Contact: Joe Applicant
Emergency Manager
No System Access
Alternate Contact: Mary Applicant
Emergency Manager 2
No System Access
Was PDA done: Y
Counties Affected: Sherman
Account Activation Status: 1) Review Requirements and Obtain Signatures
Workflow Summary
Current Step: 5) Complete
Extended Description: System initiates Account Activation
Last Advanced: Mar 19, 2018 at 12:55 PM by Maria Salazar
14 days ago
Submission: Jan 18, 2017 at 2:40 PM by User 1 Test
439 days ago
Grant
9999 Public Assistance Test Grant
Public Assistance
Declared: January 18, 2017
Emergency Deadline: July 18, 2017
Permanent Deadline: January 18, 2018
Applicant
Any Texas Town
Sherman County (5 Region)
FIPS #: 000-TEST0-00
State #: 90052 FEIN #: 111111111
Vendor #:
DUNS #: 111222333
Type: City
Physical/Mailing: 1 Longhorn Drive
Sherman, TX,
Notes & Comments
Add Note
There are currently no notes.
Be the first to add one
Document Templates
RPA Form
No Uploaded Documents
Add Document
No Issues
Add Issues

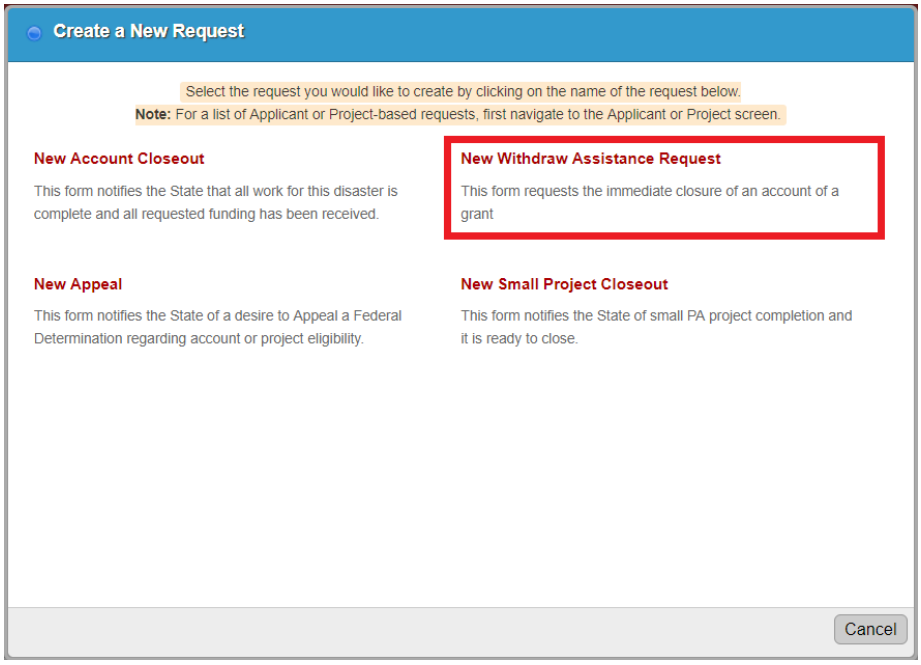
Withdraw Requests for Assistance

This form requests the immediate closure of an account typically due to an Applicant not having eligible damages.

1. Go to the home screen of the Account you wish to withdraw, and click the ***"Create New Request"*** button.

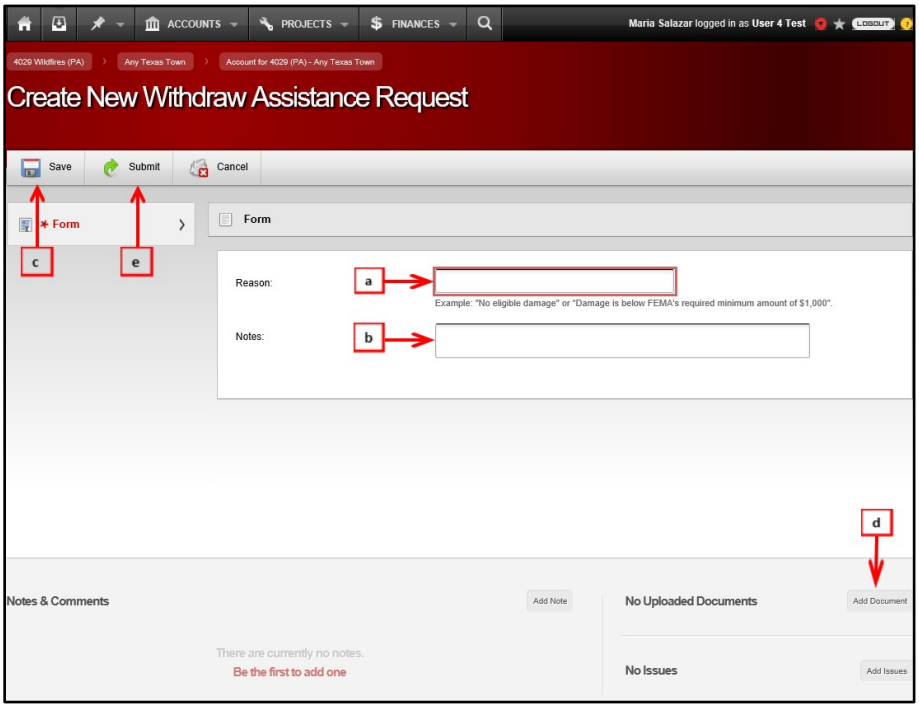


2. Click the ***"New Withdraw Assistance Request"*** link.



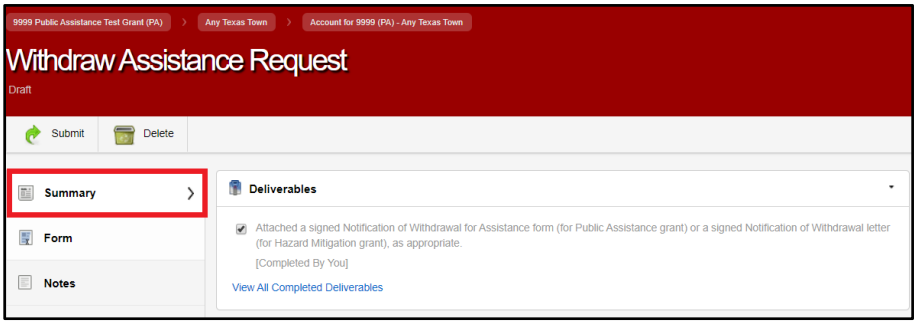
3. The form will display. Complete the form:
    a. Enter the ***"Reason"*** for the withdrawal.
    b. Enter any ***"Notes"*** to be included.
    c. Click ***"Save"*** *(the form can be saved without submitting, and retrieved at a later time from your* ***"Drafts"*** *under the* ***Inbox*** *menu)*. The form must be saved before attaching any documents.
    d. Click the ***"Add Document"*** button to upload additional documentation, if necessary.
    e. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

Withdraw Assistance Request Form

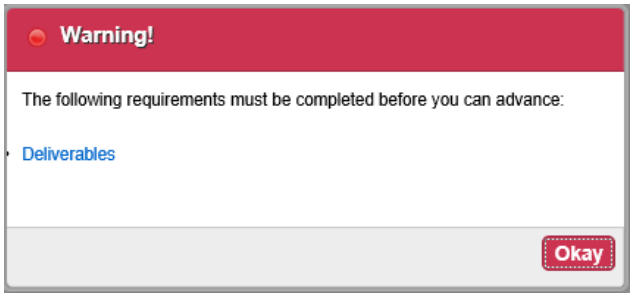


4. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

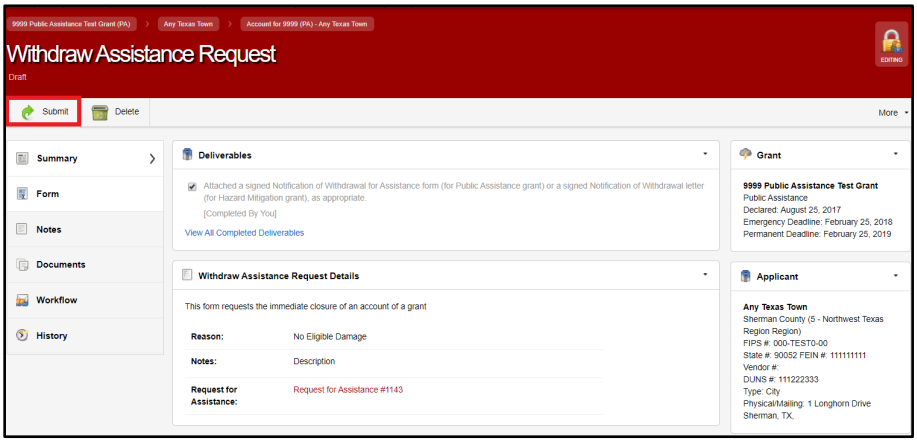
Note: *Each* ***Deliverable*** *must be checked off/completed before the form can be submitted.*



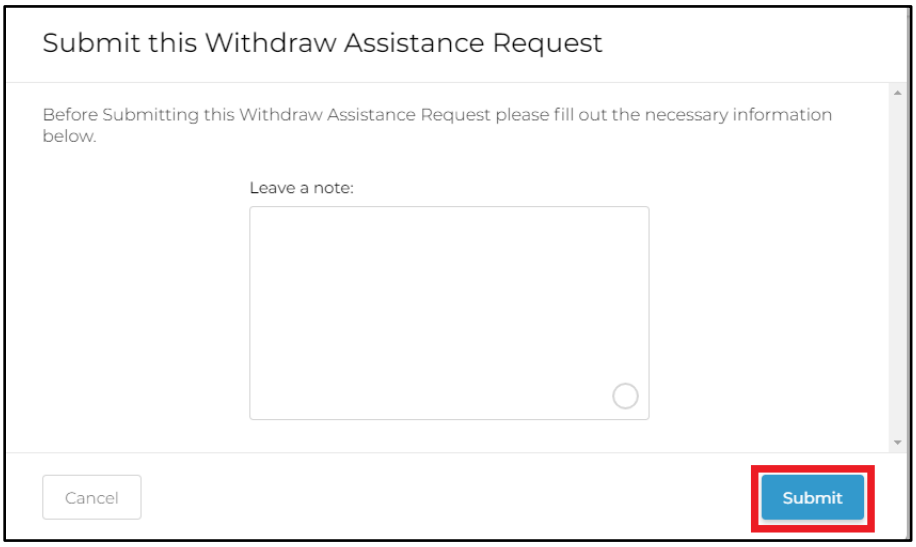
5. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



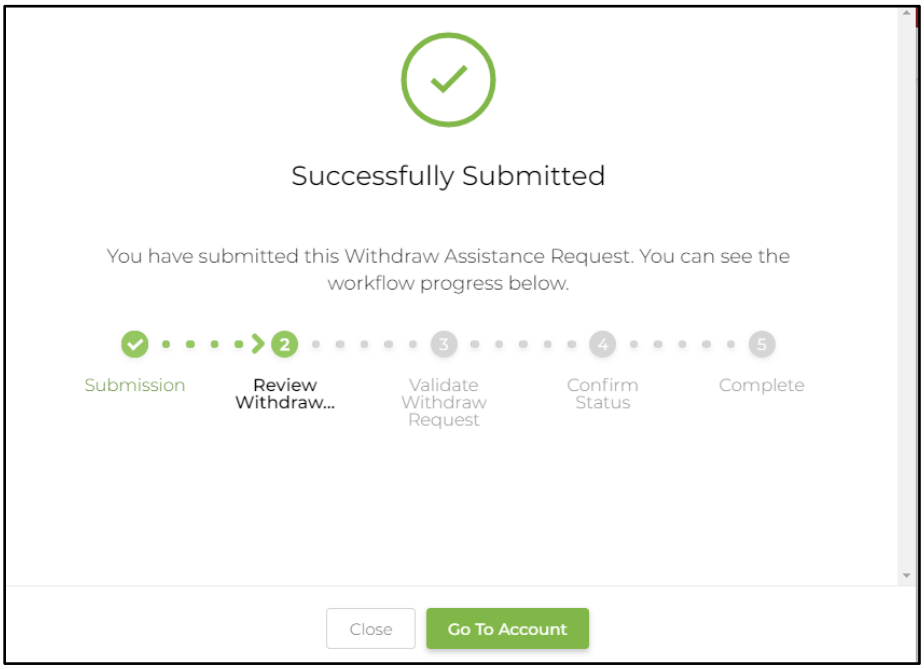
6. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



7. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

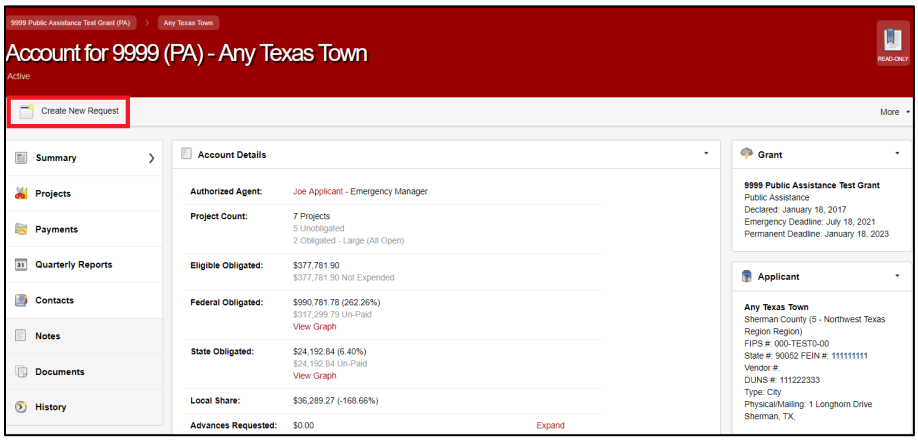


8. A notification will display letting you know that the **Withdraw Assistance Request** was successfully submitted. Select the button for the desired action, ***"Close"*** the window or ***"Go to Account."***

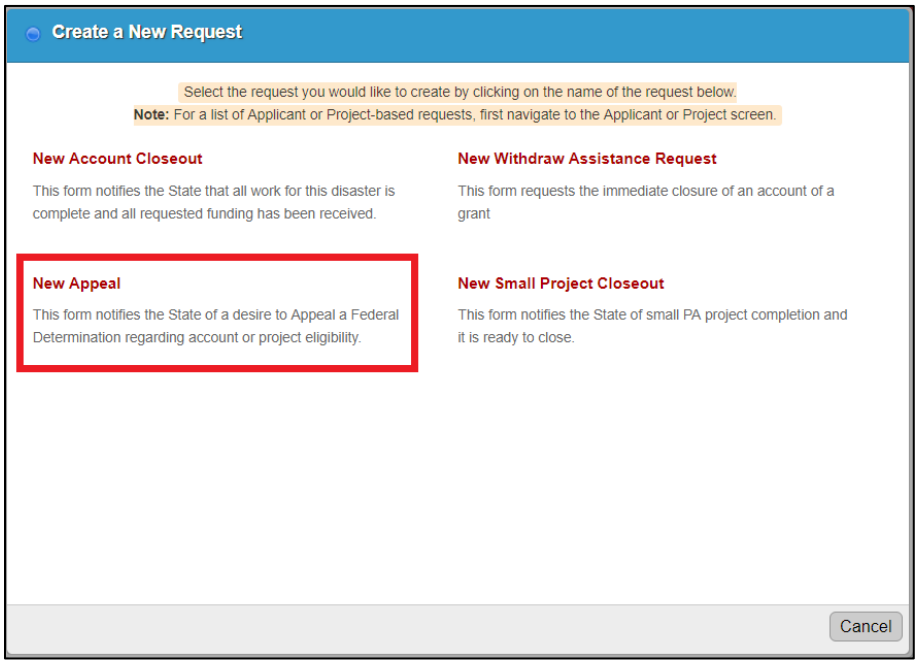


Create Account Appeal

1. Locate the **Account** that will be appealed, and click the ***"Create New Request"*** button.



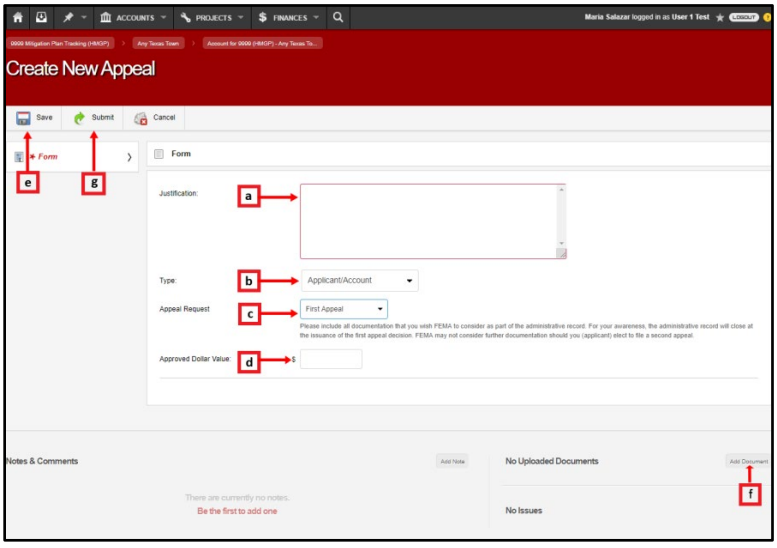
2. The following screen will display. Click ***"New Appeal."***



3. The form will display. Complete the form:
    a. Enter the ***"Justification"*** *(why appeal is needed)*.
    b. Select ***"Type"*** of Appeal from the drop down menu *(Applicant/Account in this example).*
    c. Select ***"Appeal Request"*** from the drop down menu *(First Appeal in this example).*
    d. Enter ***"Approved Dollar Value."***
    e. Click ***"Save"*** to establish the form *(the form can be saved without submitting, and retrieved at a later time from your **"Drafts"** under the **Inbox** menu).* The form must be saved before attaching any documents.
    f. Click on the ***"Add Document"*** button to upload <u>all</u> pertinent supporting documentation. (*Please see note on form under Appeal Request for First Appeals.)*
    g. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

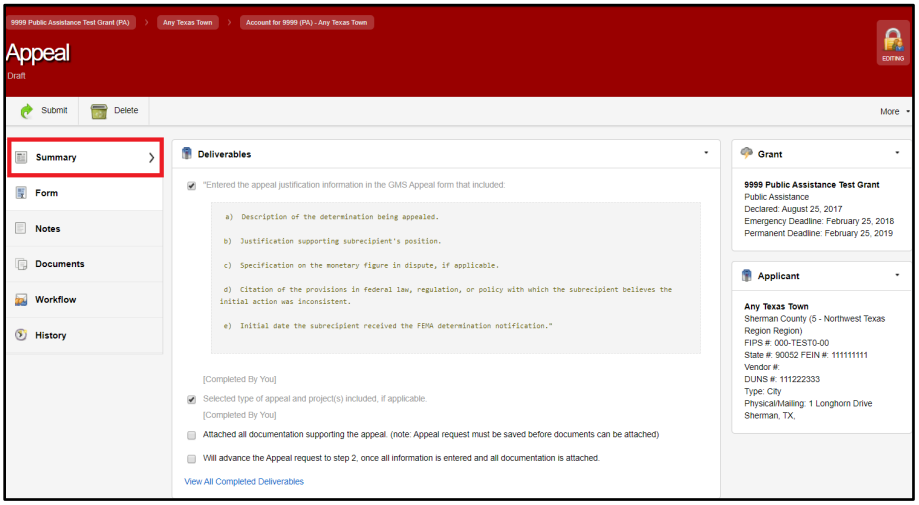
    Note: *The appeal <u>must</u> contain documented justification supporting the appeal including monetary amount in dispute. It must also include a citation of the provisions in federal law, regulation, or policy with which you believe the initial action was inconsistent.*

Appeal Form

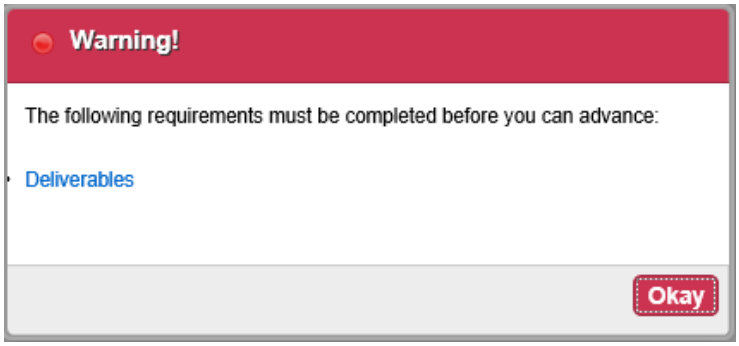


4. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

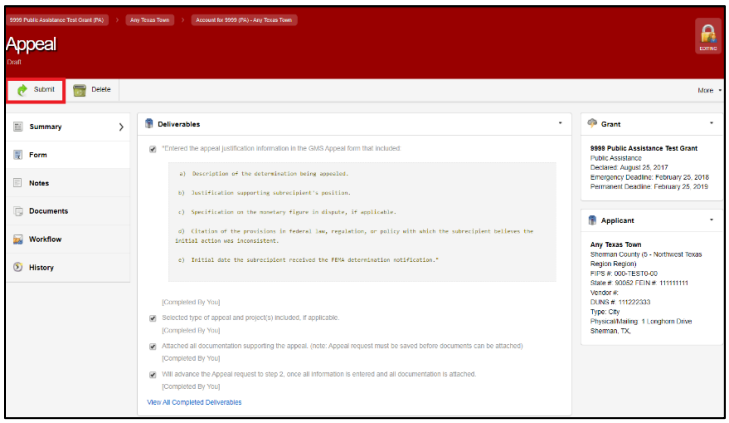
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted.*



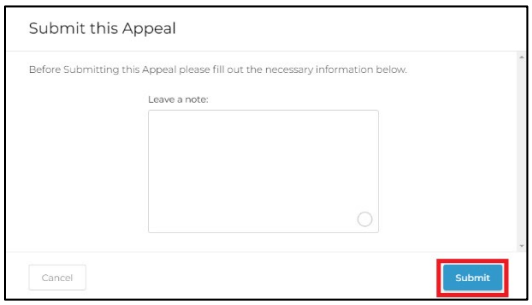
5. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



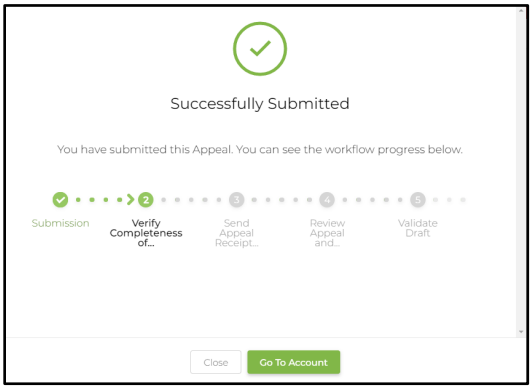
6. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



7. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

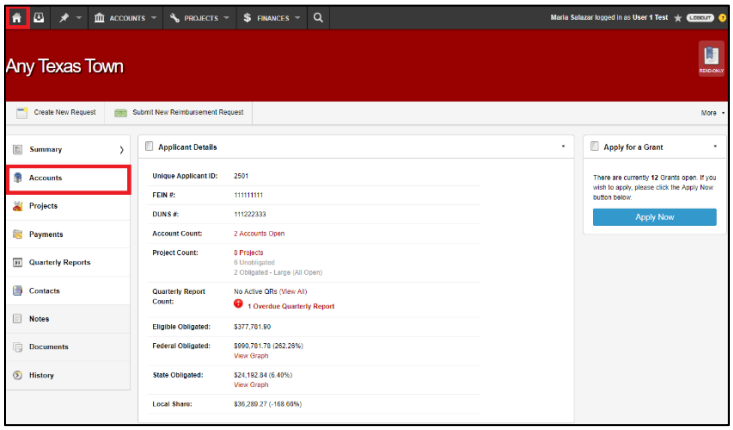


8. A notification will display letting you know that the **Appeal** was successfully submitted. Select the button for the desired action. ***"Close"*** the window or ***"Go to Account."***

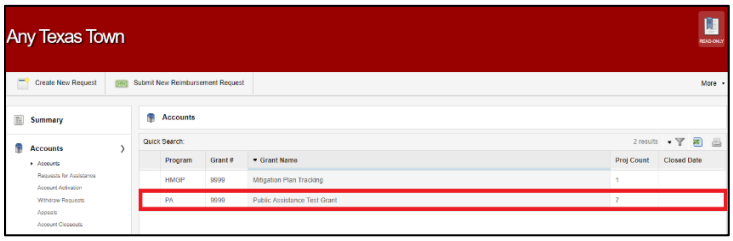


Account Closeout

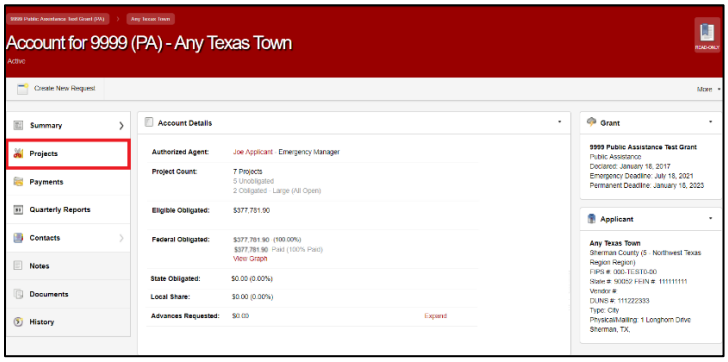
1. Navigate to your **Home** screen. On the side menu, select ***"Accounts."*** If you represent more than one organization, select the Applicant first.



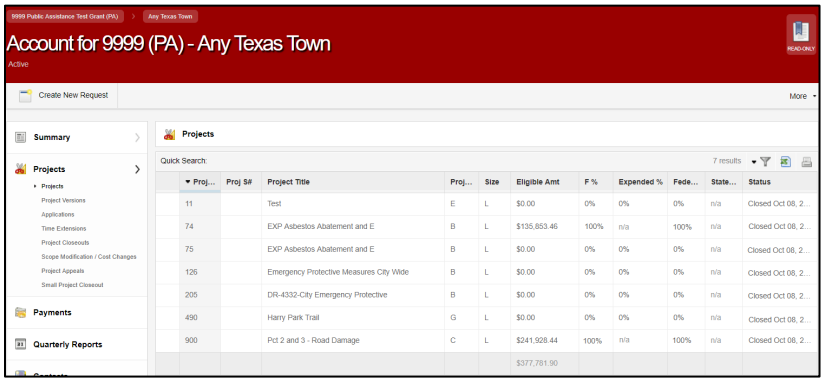
2. A listing of all **Accounts** will display. Select the **Account** that needs to be closed out by clicking on that line *(lines are hyperlinked)*.



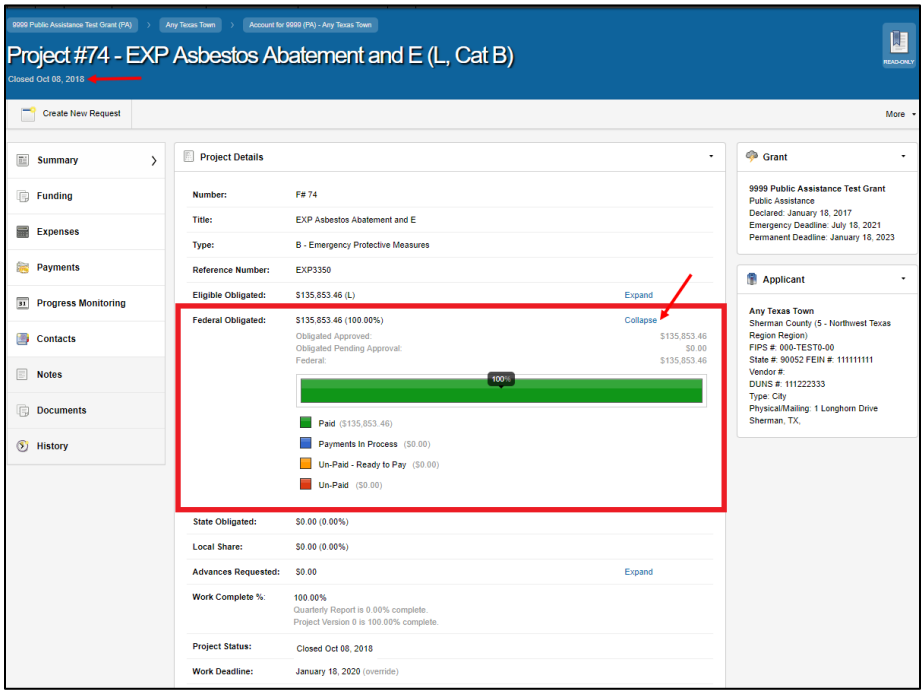
3. Select ***"Projects"*** to bring up a listing of the projects for this account.



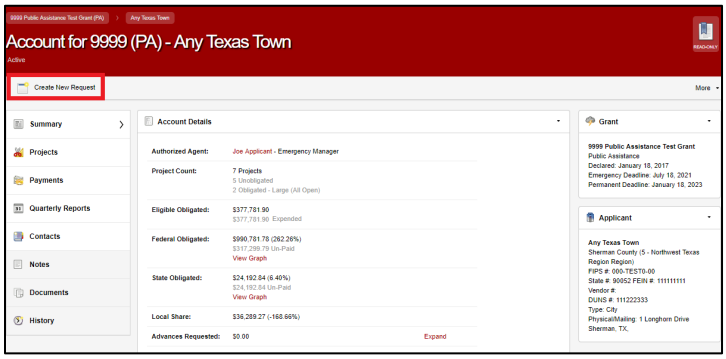
4. A listing of all the projects for this Account will display. Check to make sure that all projects are closed for this account *(check the **Status** column)*.



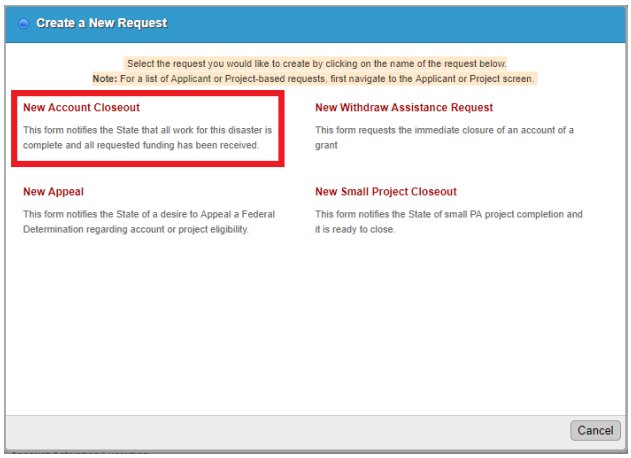
5. Below is an example of a closed project with the **Project Details**. It is showing 100% paid on the **Federal Obligated**. Click "**Expand**" to view the details.



6. Navigate back to the Account that you would like to close out, and click the ***"Create New Request"*** button.



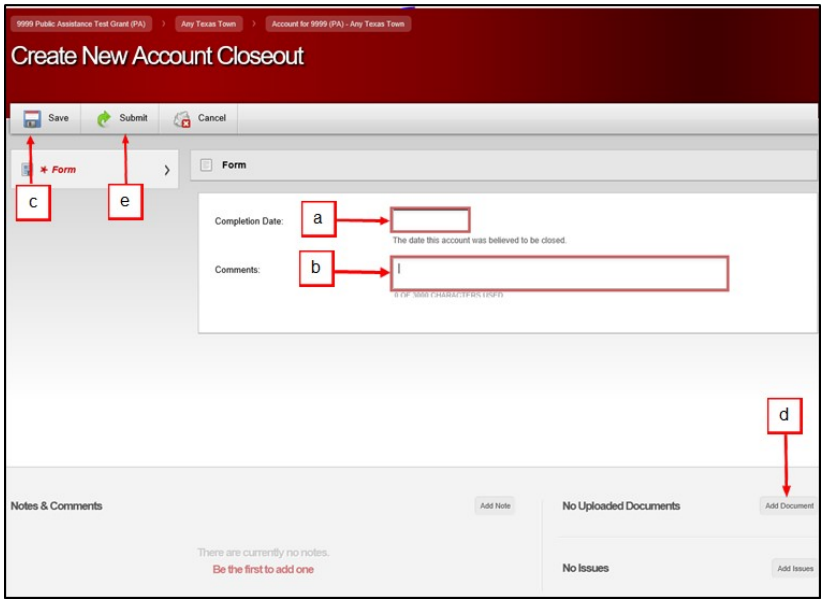
7. Select ***"New Account Closeout."***



8. The form will display. Complete the form:
    a. Enter the ***"Completion Date"*** *(date all work was completed)*.
    b. Enter ***"Comments"*** *(any additional information that might need to be known)*.
    c. Click ***"Save"*** *(the form can be saved without submitting, and retrieved at a later time from your **"Drafts"** under the **Inbox** menu)*. The form must be saved before attaching any documents.
    d. Click the ***"Add Document"*** button to upload additional documents, if necessary.

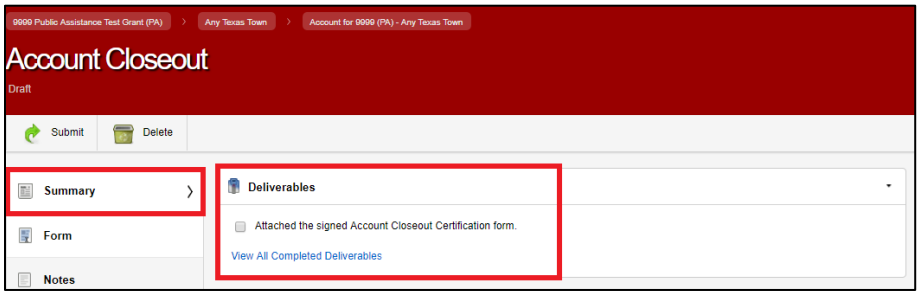
e. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

Account Closeout Form

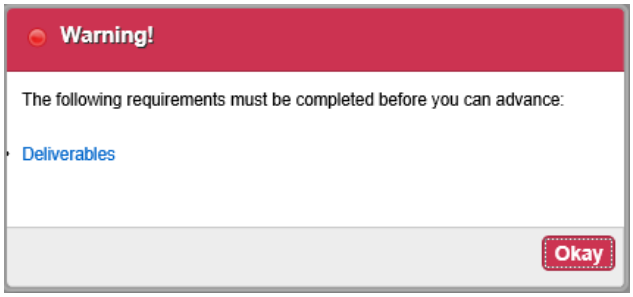


9. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

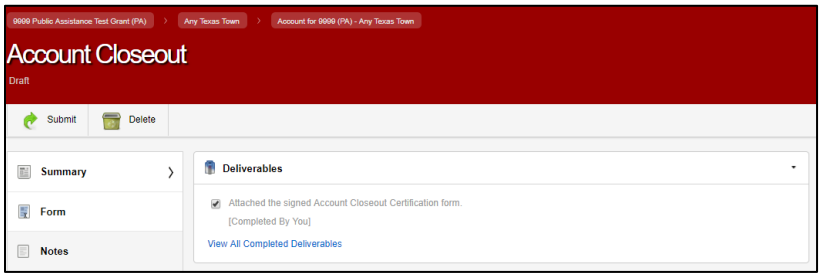
Note: *Each* ***Deliverable*** *must be checked off/completed before the form can be submitted.*



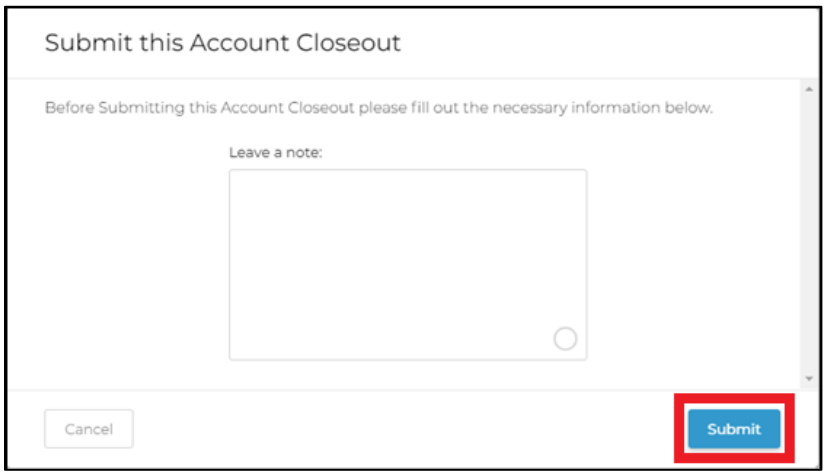
10. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



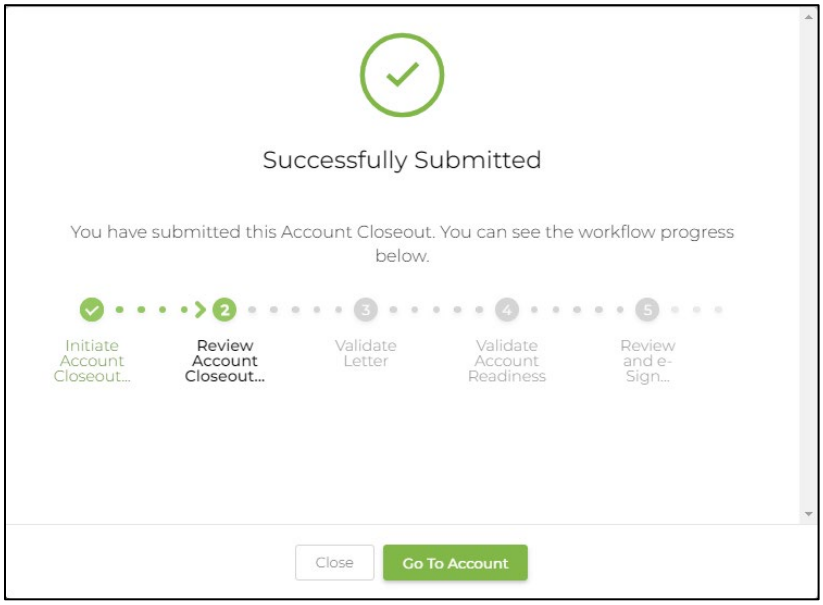
11. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



12. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

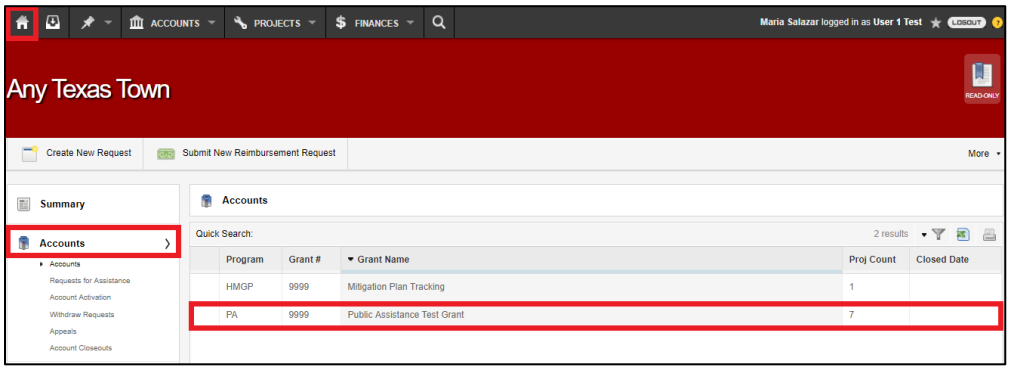


13. A notification will display letting you know that the **Account Closeout** was successfully submitted. You may ***"Close"*** the window or ***"Go to Account."***

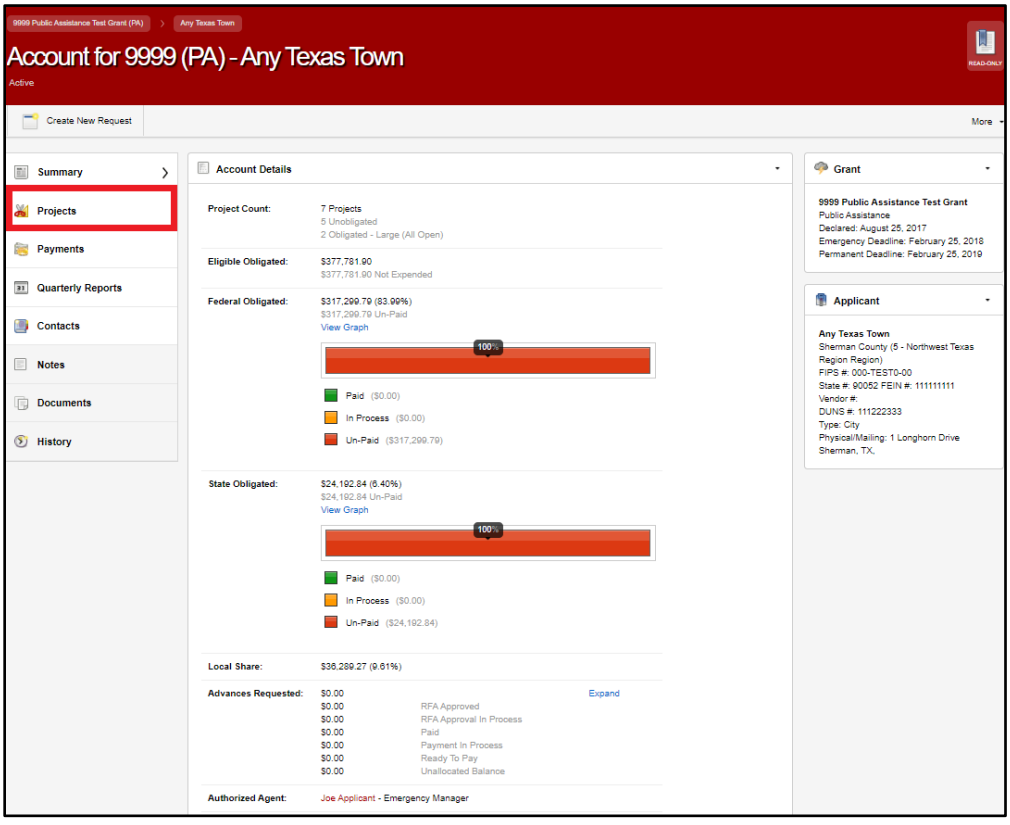


Find a Project

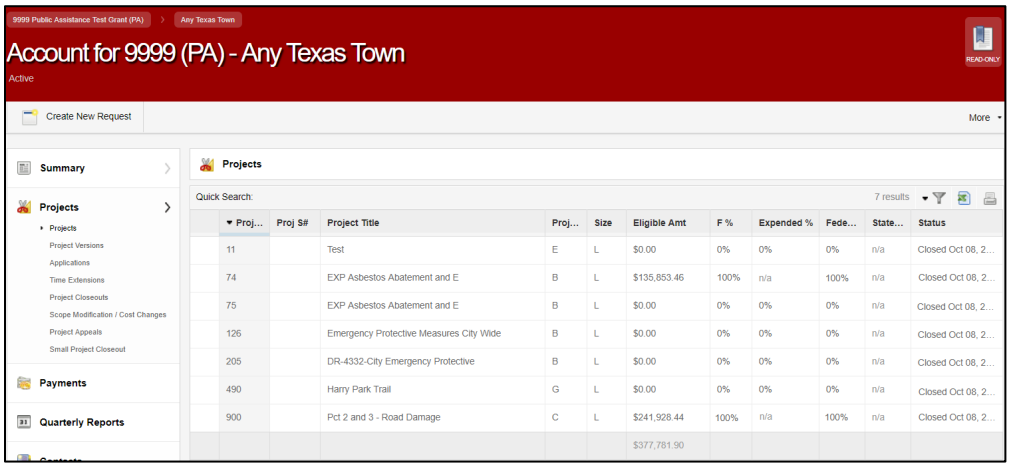
1. From the **Home** screen, select ***"Accounts"*** to locate the grant for the project. Click on the ***"Grant"*** to be navigated. If you represent more than one organization, select the Applicant first.



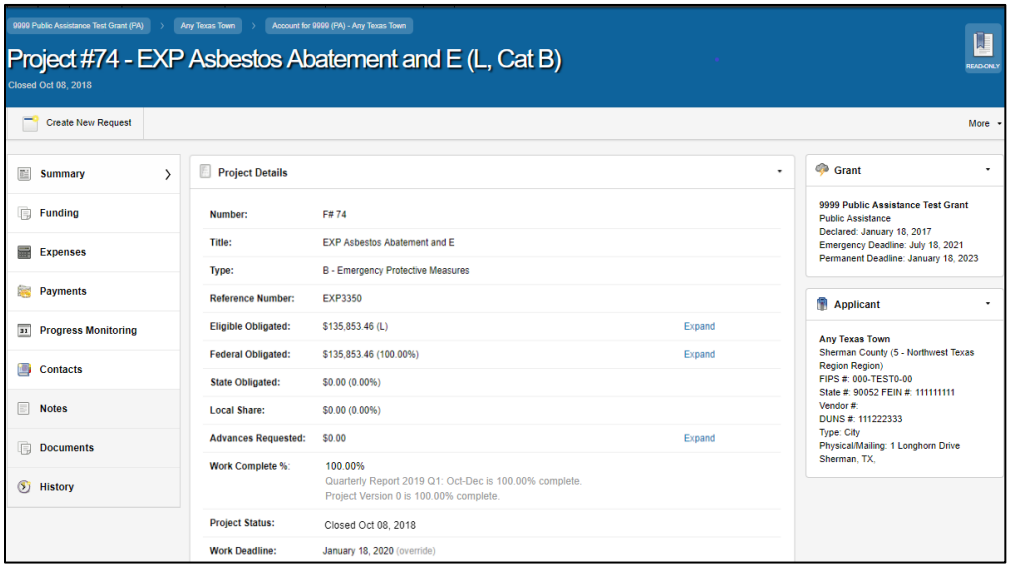
2. Select ***"Projects"*** from the menu on the left on the **Account Details** screen.



3. This will bring up a list of all projects listed for the selected grant; choose a ***"Project"*** to view.

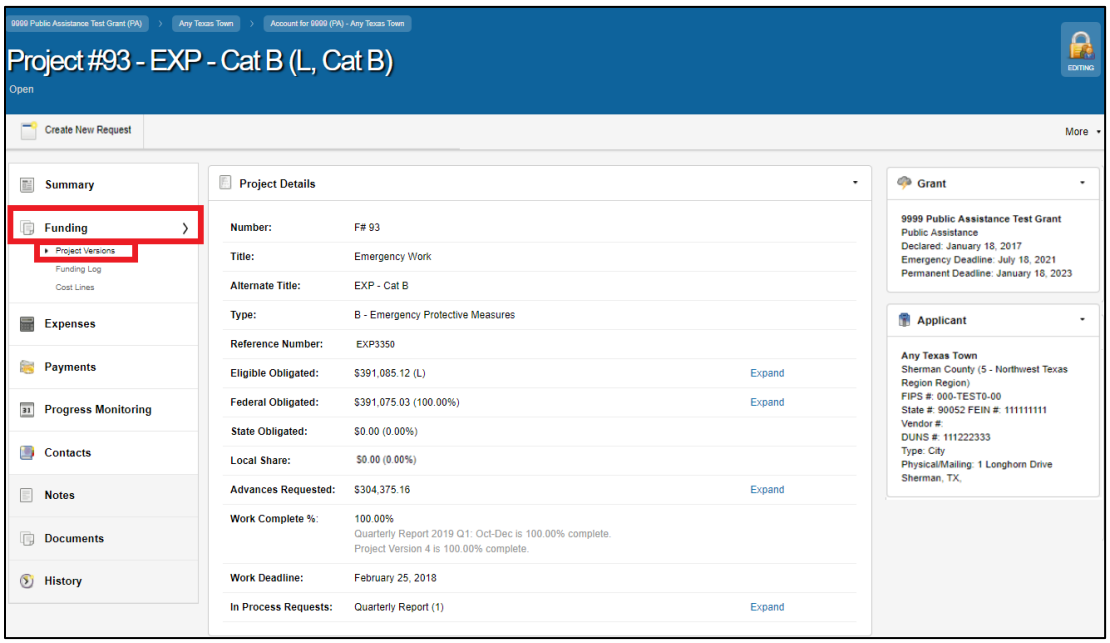


4. The **Project Details** Summary screen will display.

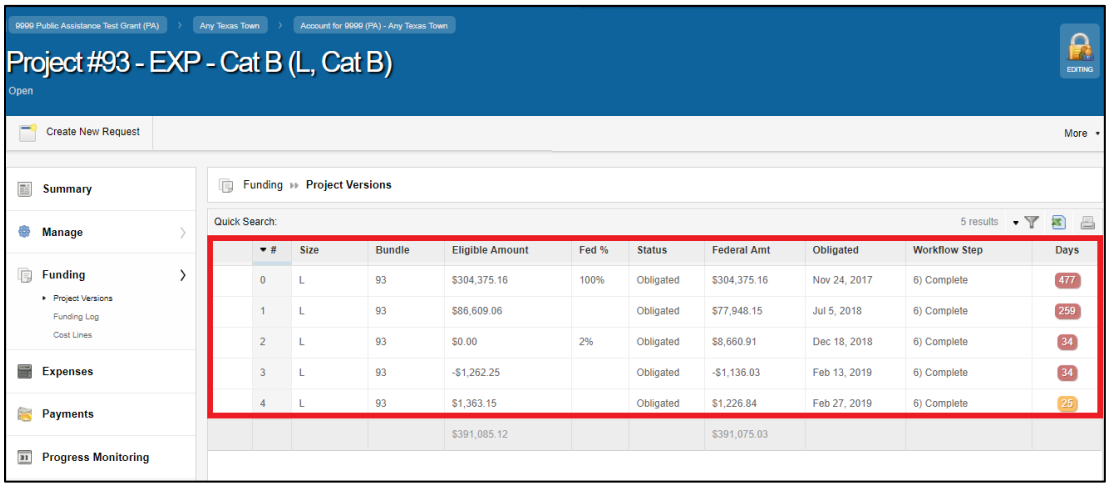


Find Project Worksheet (PW) & Supporting Documentation

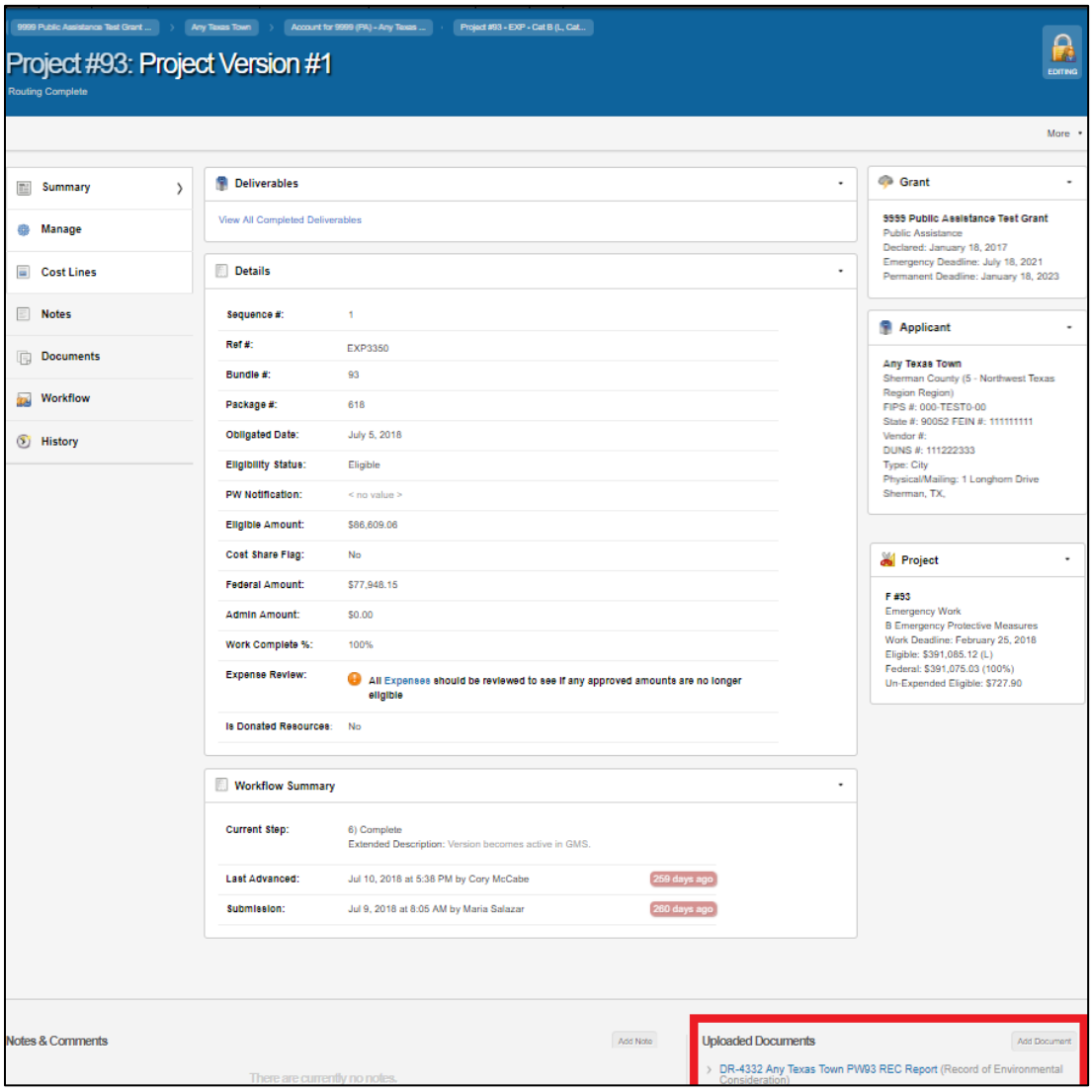
1. Navigate to a specific project, and click ***"Funding"*** to the right of the **Project Details** screen. All of the **Project Versions** will display for the selected project.



2. Select the version that you would like to view by clicking on the version number *(first column numbered 0-4 in this example; the lines are hyperlinked).*

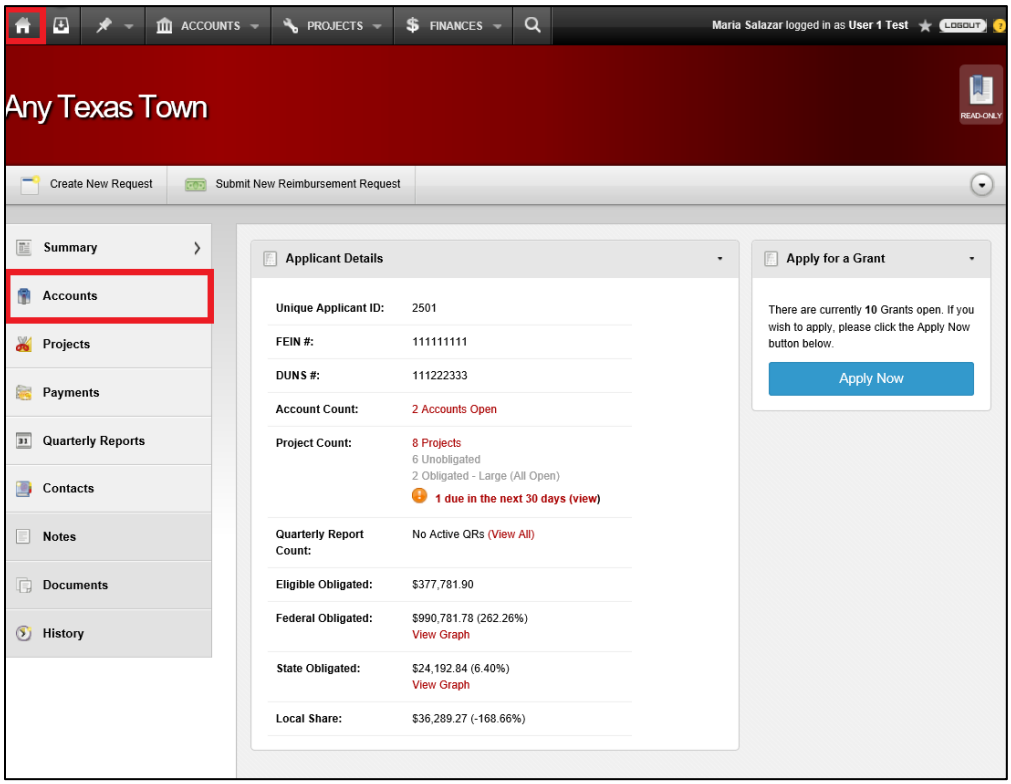


3. The **Project Version** will display. Scroll down to the bottom of the screen to view the Project Worksheet (PW) Supporting Documentation, or by clicking the ***"Documents"*** tab on the left menu.

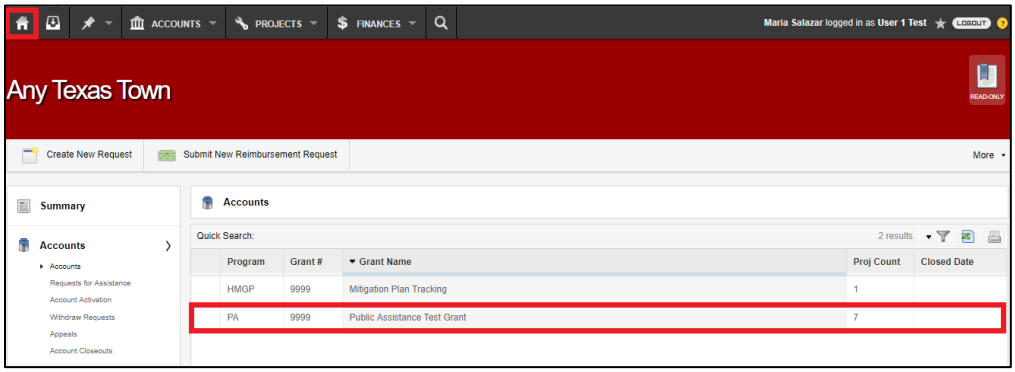


Project Scope Modification/Cost Change

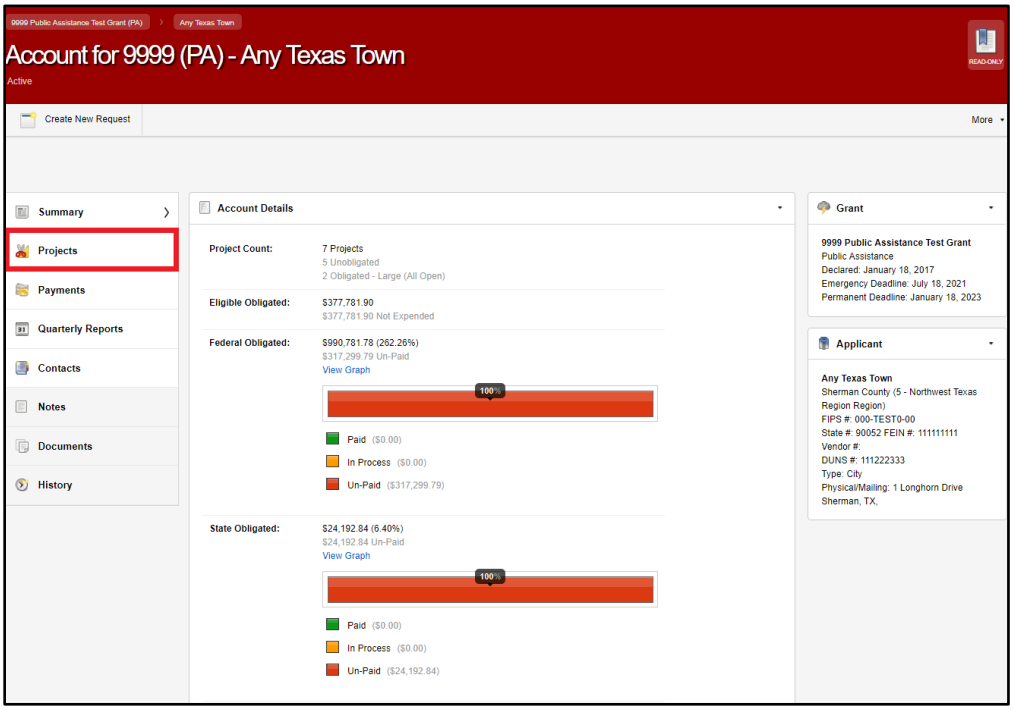
1. From the **Home** screen, select the ***"Accounts"*** tab from the left side menu. If you represent more than one organization, select the Applicant first.



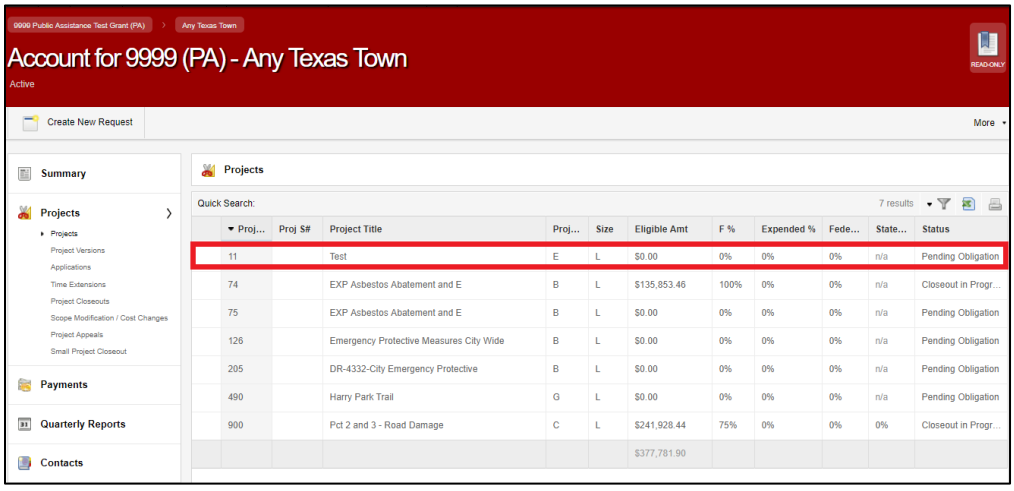
2. Select the ***"Account"*** that contains the **Project** that needs a **Scope Modification/Cost Change**. The system will navigate to that account *(lines are hyperlinked)*.



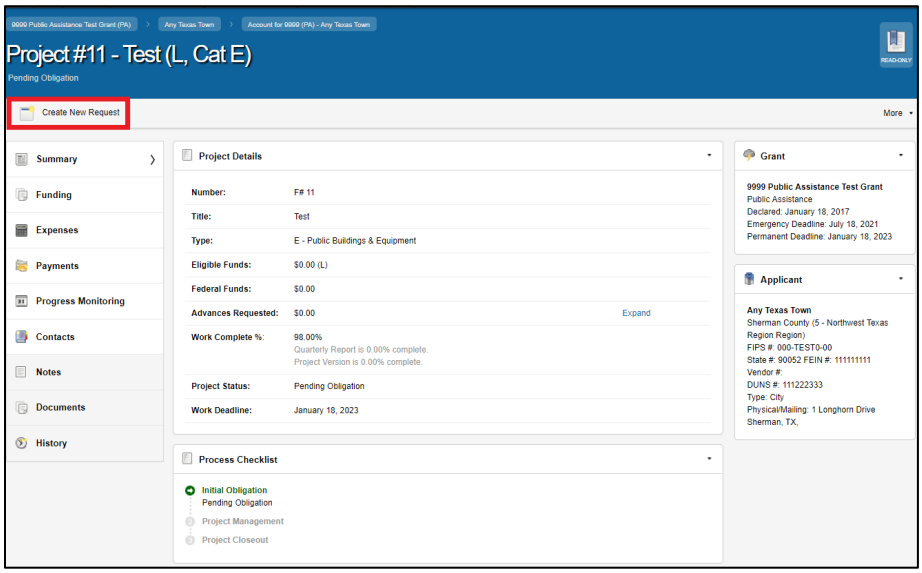
3. Select the ***"Projects"*** tab to the left of the **Account Details** screen to bring up a list of projects for this grant.



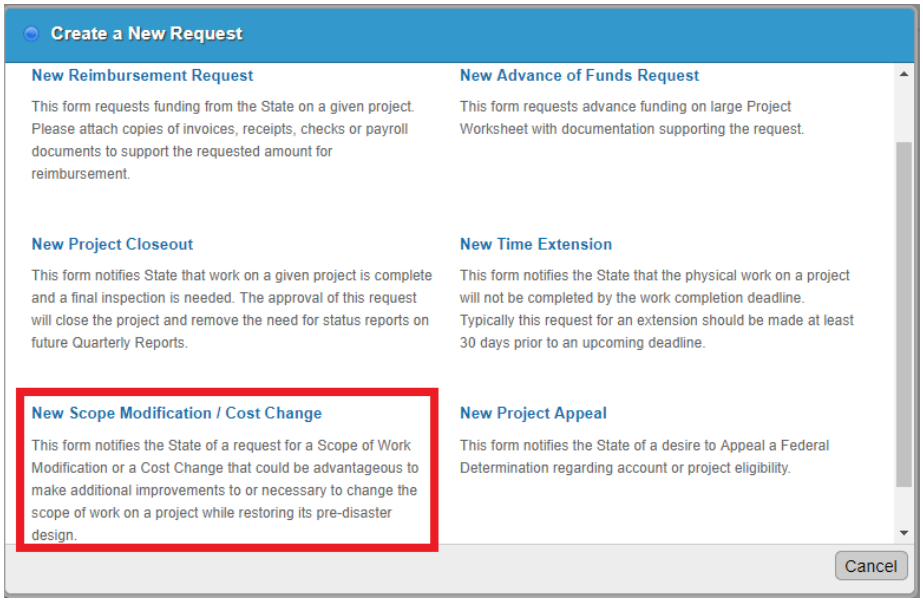
4. A list of projects will display. Select the ***"Project"*** that needs the **Scope Modification and/or Cost Change**.



5. The **Project Details** Summary screen will display. Click the ***"Create New Request"*** button.

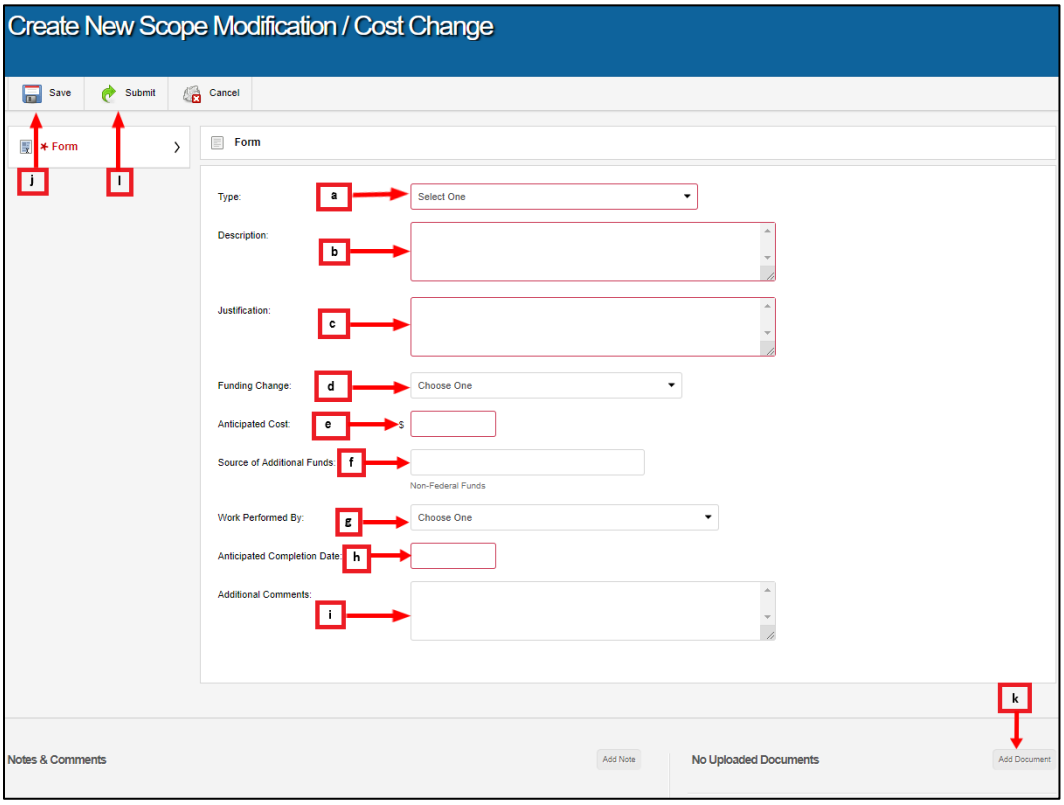


6. Select ***"New Scope Modification / Cost Change"*** to be navigated to the form.

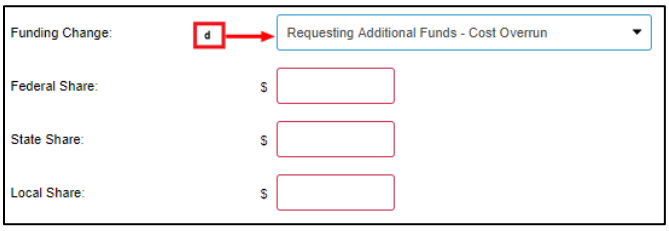


7. The form will display. Complete the form:
    a. Select the ***"Type"*** of change for the Project from the drop down menu.
    b. Enter the ***"Description"*** for the change to the Project.
    c. Enter the ***"Justification"*** *(why is a Scope Modification and/or Cost Change needed)*.
    d. Select an option for ***"Funding Change"*** from the drop down menu.
        a. If you select ***"Requesting Additional Funds – Cost Overrun,"*** or *"**Returning Funds – Cost Underrun**"* enter the additional required information:
            - enter the ***"Federal Share"***
            - enter ***"State Share"***
            - enter ***"Local Share"***
    e. Enter ***"Anticipated Cost."***
    f. Enter the ***"Source of Additional Funds"*** for the Project (Non-Federal funds).
    g. Select the *"**Work Performed By"*** from the drop down menu *(who performed the work)*.
    h. Enter the ***"Anticipated Completion Date."***
    i. Add ***"Additional Comments,"*** if needed.
    j. Click ***"Save"*** *(the form can be saved without submitting, and retrieved at a later time from your **"Drafts"** under the **Inbox** menu)*. The form must be saved before attaching any documents.
    k. Click the ***"Add Document"*** button to upload supporting documentation for the Scope Modification/Cost Change.
    l. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

Scope Modification/Cost Change Form

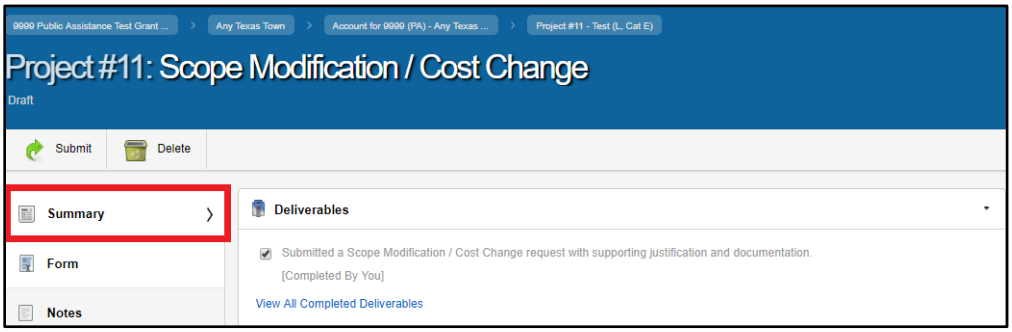


If ***"Requesting Additional Funds – Cost Overrun"*** or ***"Returning Funds – Cost Underrun"*** is selected in Item **"d"** *(as noted above),* of the Scope Modification / Change Form, additional required fields will display.

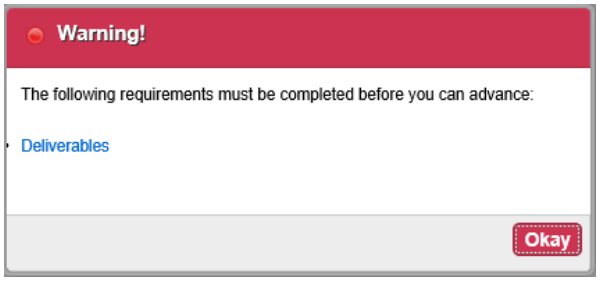


8. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

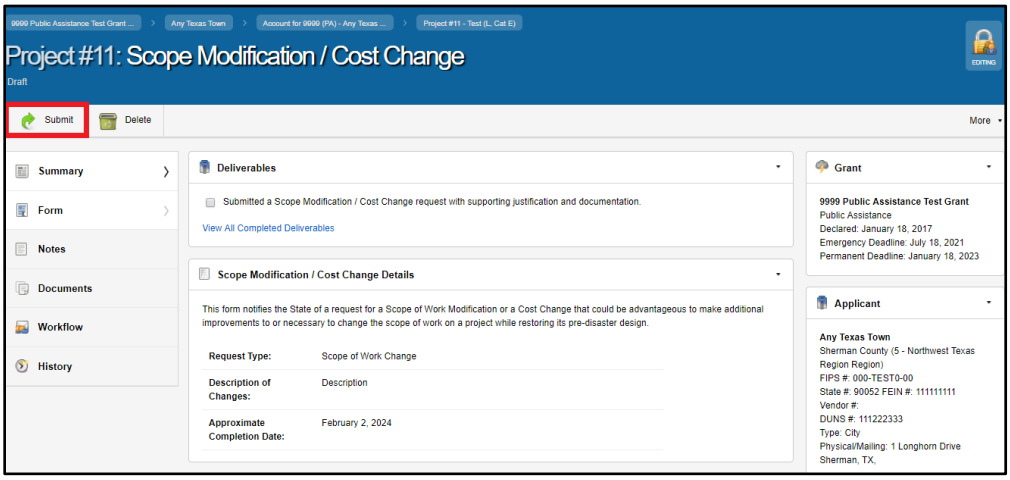
Note: *Each* ***Deliverable*** *must be checked off/completed before the form can be submitted.*



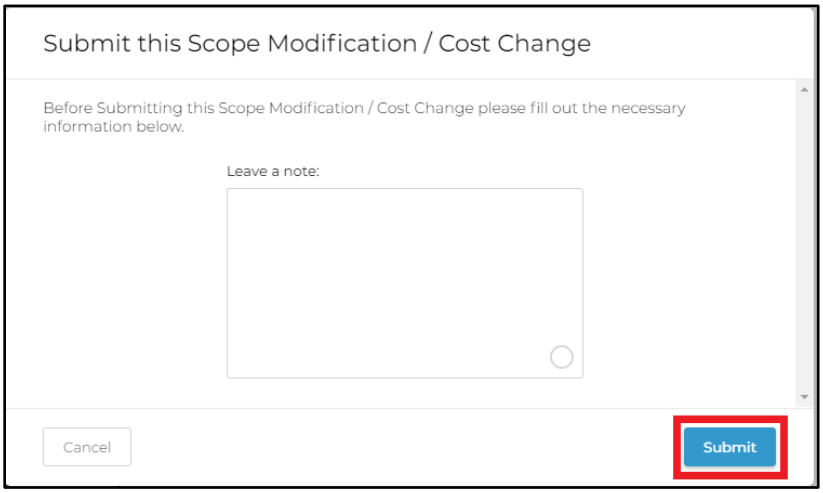
9. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



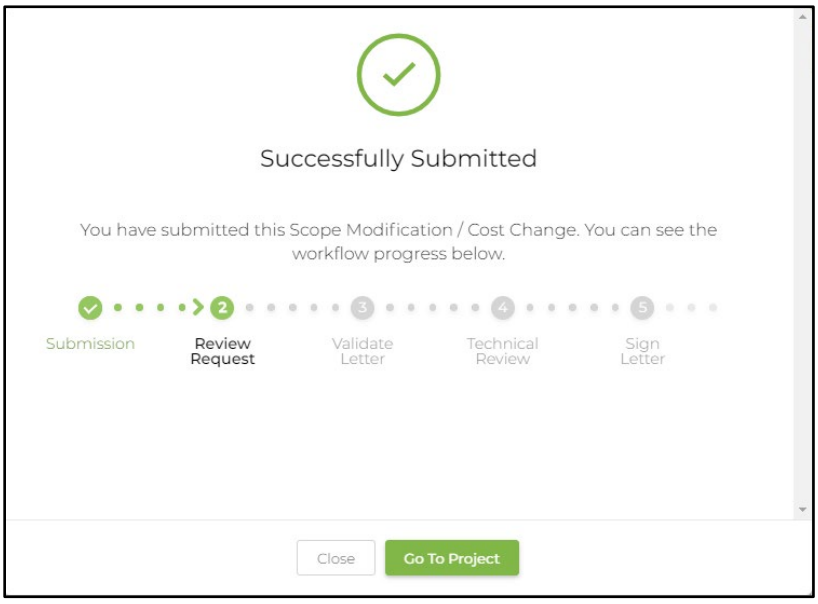
10. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



11. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

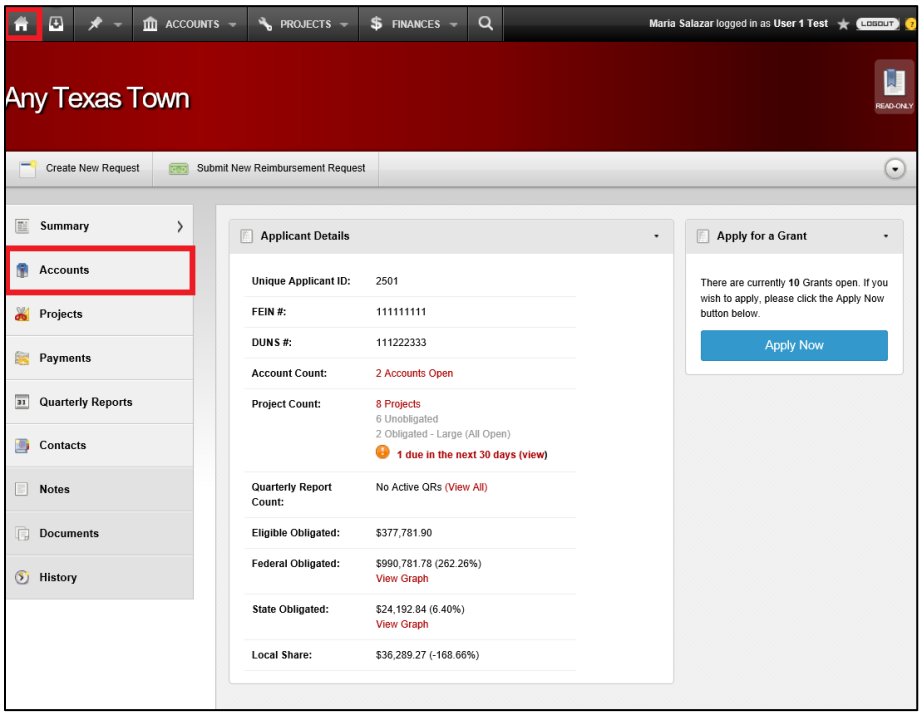


12. A notification will display letting you know that the **Scope Modification / Cost Change** was successfully submitted. Select the button for the desired action. ***"Close"*** the window, or ***"Go to Project."***

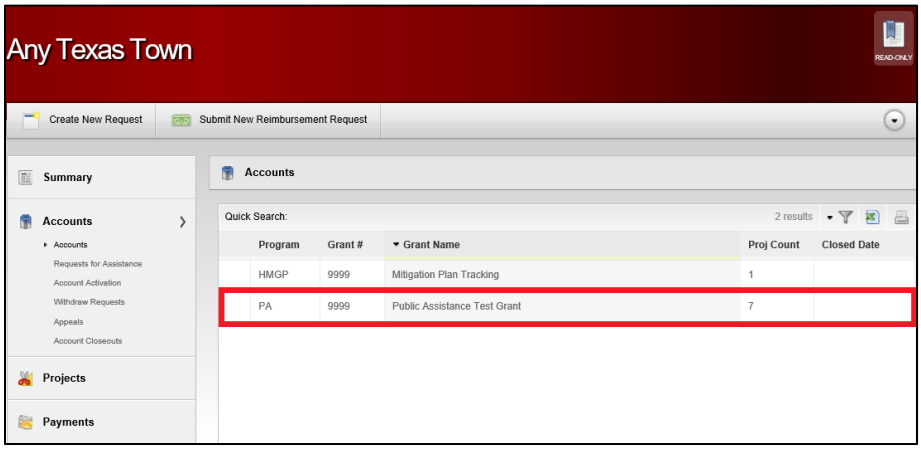


Project Time Extension

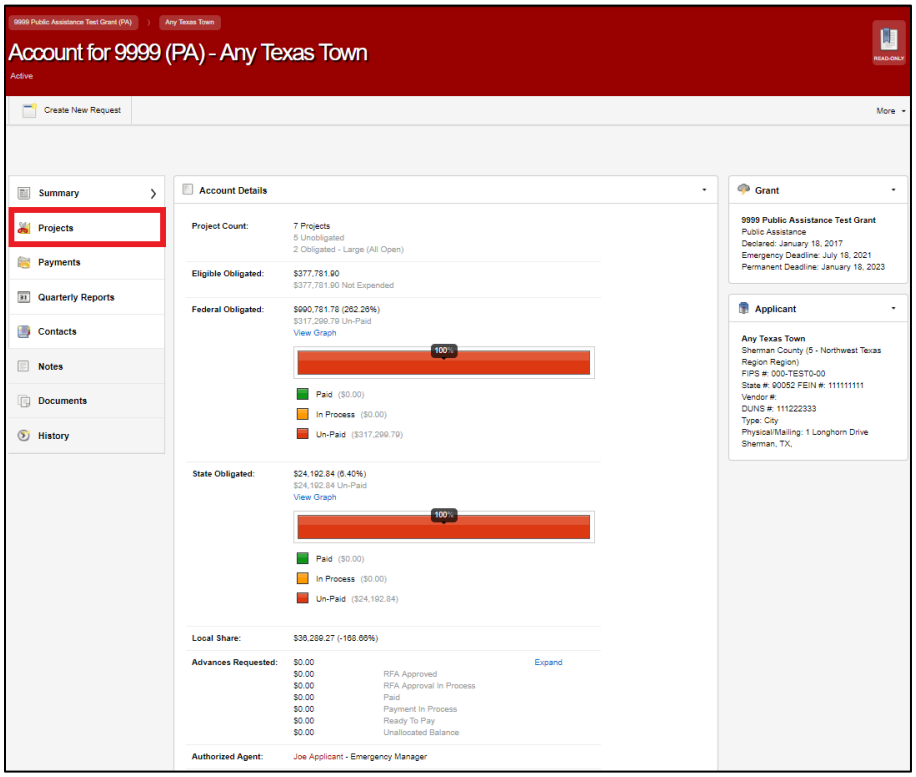
1. From the **Home** screen, select ***"Accounts."*** If you represent more than one organization, select the Applicant first.



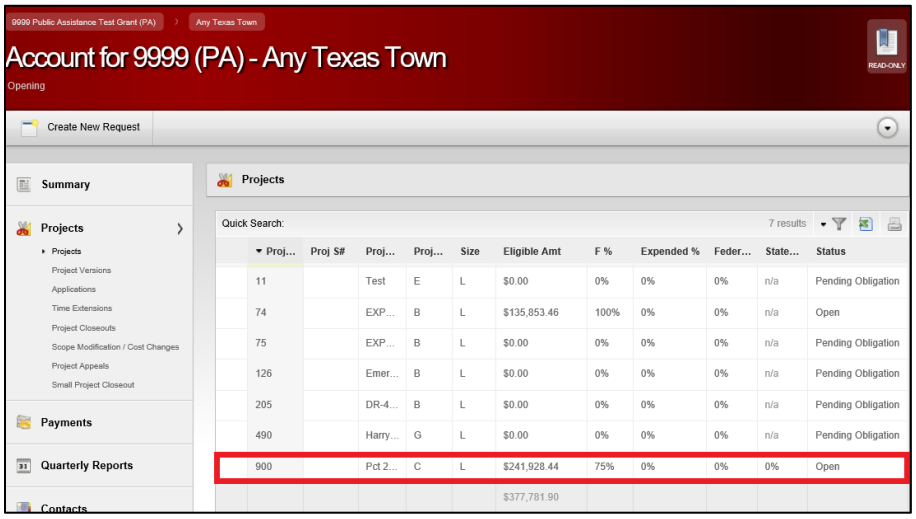
2. Select the ***"Account"*** that contains the **Project** that needs a **Time Extension**. The system will navigate to that account *(lines are hyperlinked)*.



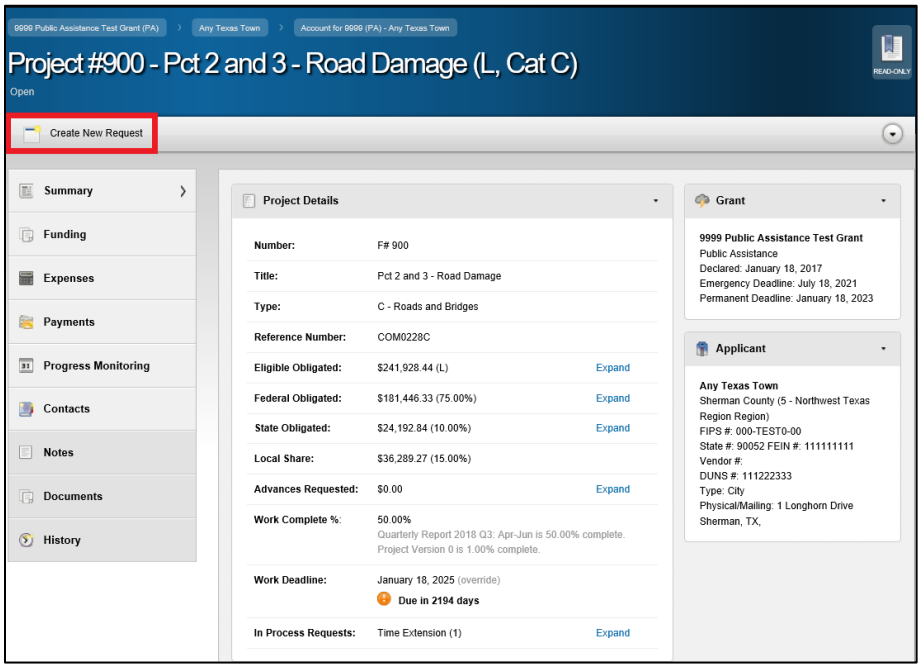
3. At the **Account Details** screen, select the ***"Projects"*** tab on the left side menu.



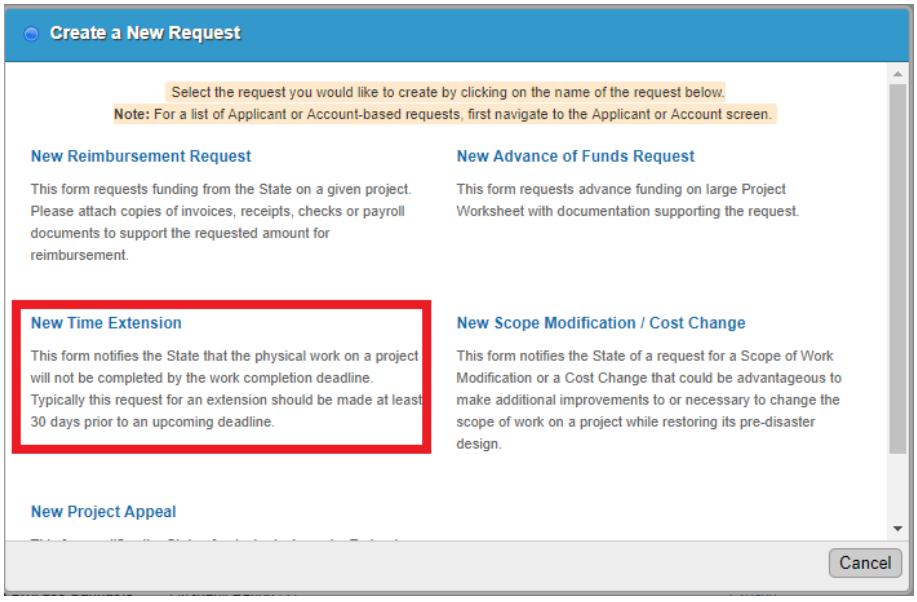
4. This will display a list of all **Projects** for the Grant. Select the ***"Project"*** that needs a **Time Extension**.



5. The **Project Details** Summary screen will display. Click the ***"Create New Request"*** button.

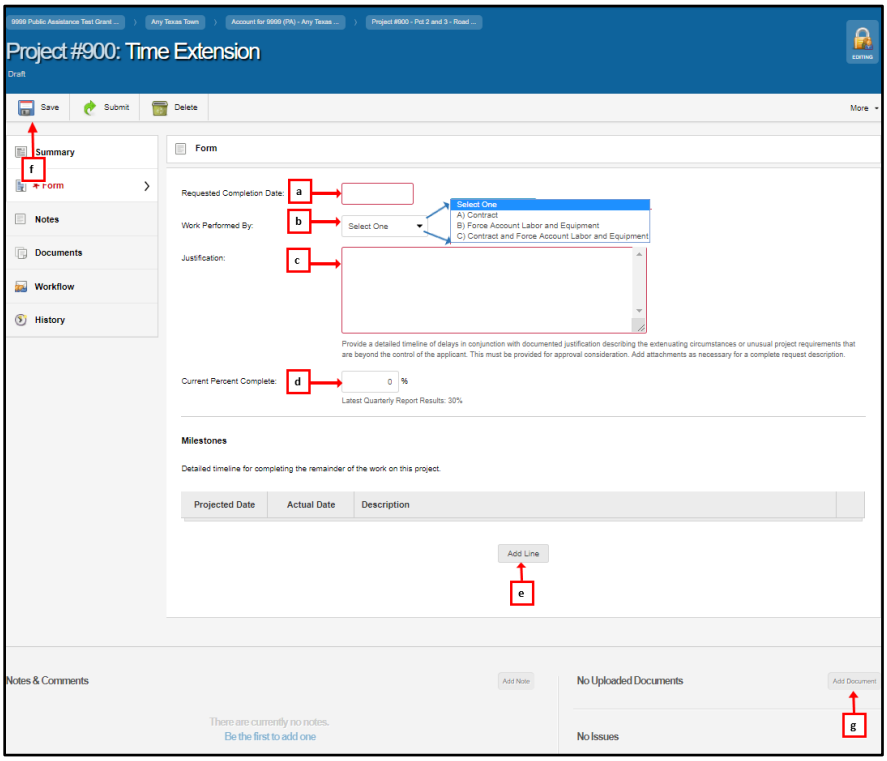


6. Select ***"New Time Extension"*** to be navigated to the form.



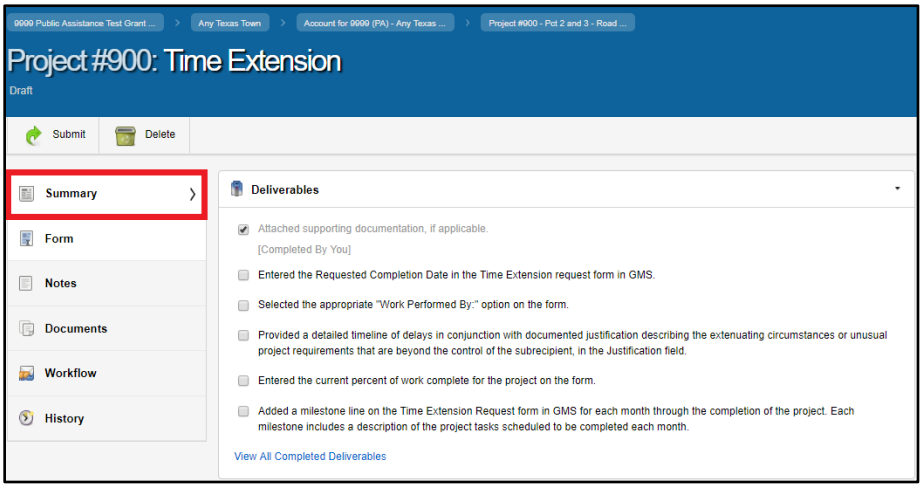
7. The form will display. Complete the form:
    a. Enter the ***"Requested Completion Date"*** of the Project.
    b. Select ***"Work Performed By"*** from the drop down menu *(who performed the work)*.
    c. Enter the ***"Justification"*** *(why is a Time Extension needed)*.
    d. Enter the ***"Current Percent Complete."*** The latest Quarterly Report percent complete will display below the box.
    e. Click the ***"Add Line"*** button under **Milestones** to add milestones. Enter the ***"Projected Date,"*** and ***"Description"*** for completing the remainder of the work for this project. Repeat these steps to add additional lines/milestones.
    f. Click ***"Save"*** *(the form can be saved without submitting, and retrieved at a later time from your **"Drafts"** under the **Inbox** menu)*. The form must be saved before attaching any documents.
    g. Click the ***"Add Document"*** button to upload supporting documentation for the Time Extension.

Time Extension Form

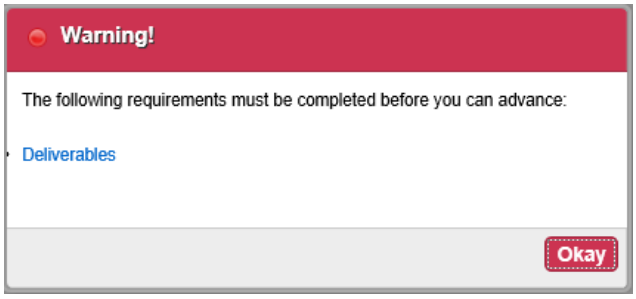


8. After you have saved the form, click the ***"Summary"*** tab on the left side menu, to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

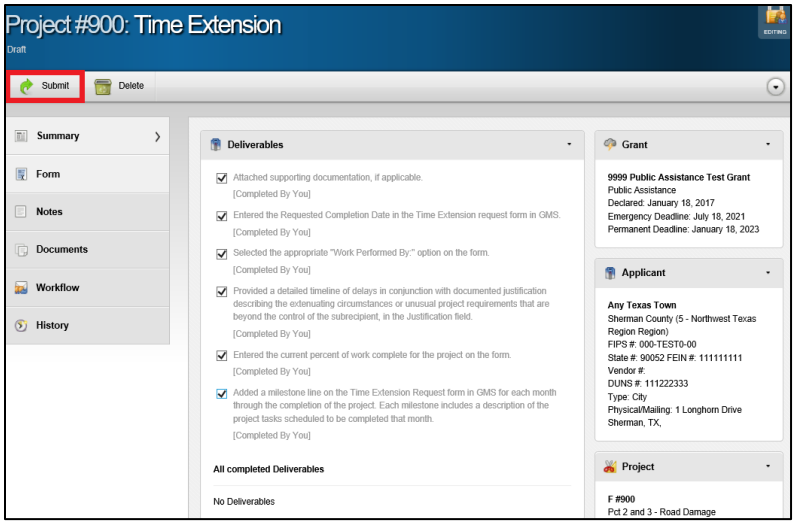
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted.*



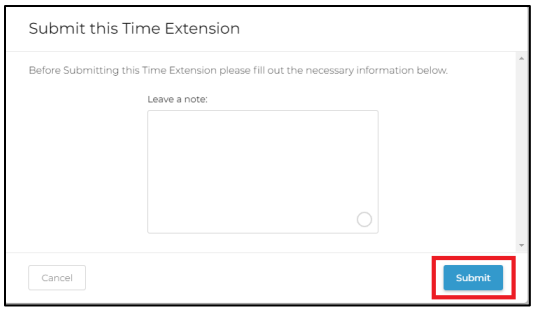
9. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



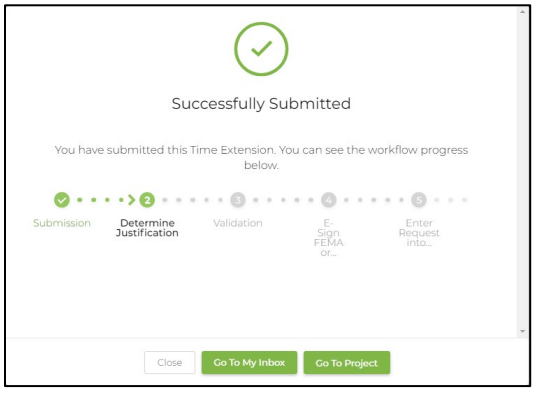
10. Click the ***"Submit"*** button when all of the Deliverables have been completed.



11. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

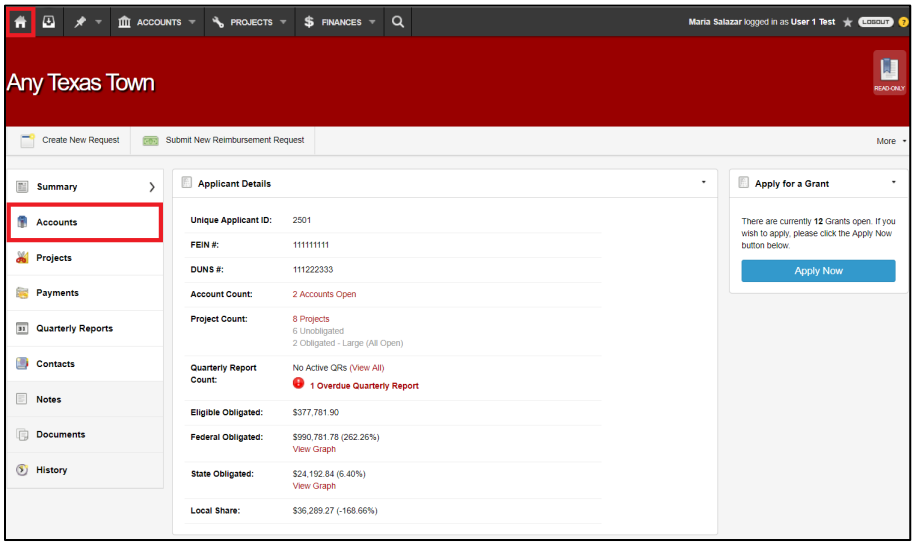


12. A notification will display letting you know that the **Time Extension** was successfully submitted. You may ***"Close"*** the window, ***"Go to My Inbox,"*** or ***"Go to Project."*** The option to go to Inbox is displayed because the Time Extension was navigated from the Draft documents.

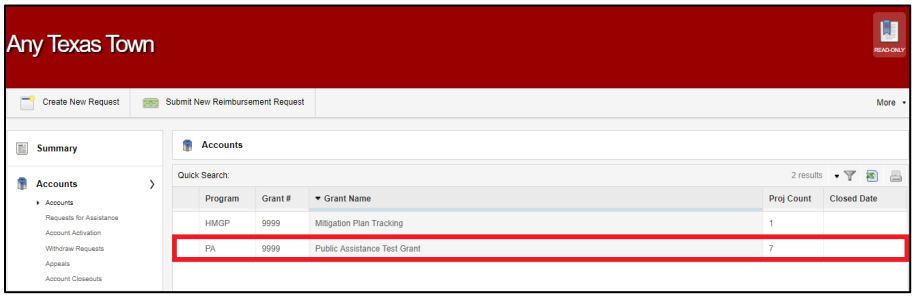


Small Project Closeout

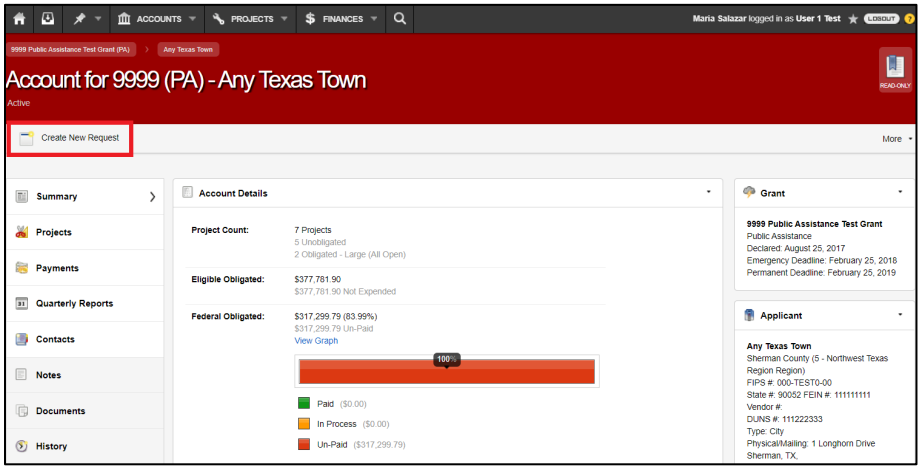
1. From the **Home** screen, select ***"Accounts."*** If you represent more than one organization, select the Applicant first.



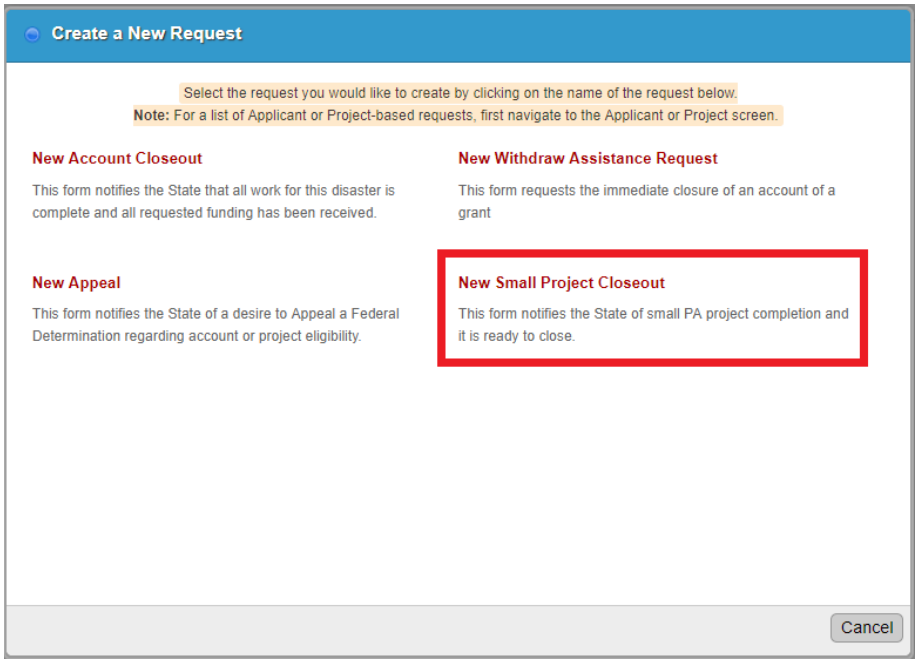
2. Select the ***"Account"*** that contains the **Project(s)** that needs to be closed out. The System will navigate to that account *(lines are hyperlinked)*.



3. At the **Account** page, click the ***"Create New Request"*** button.

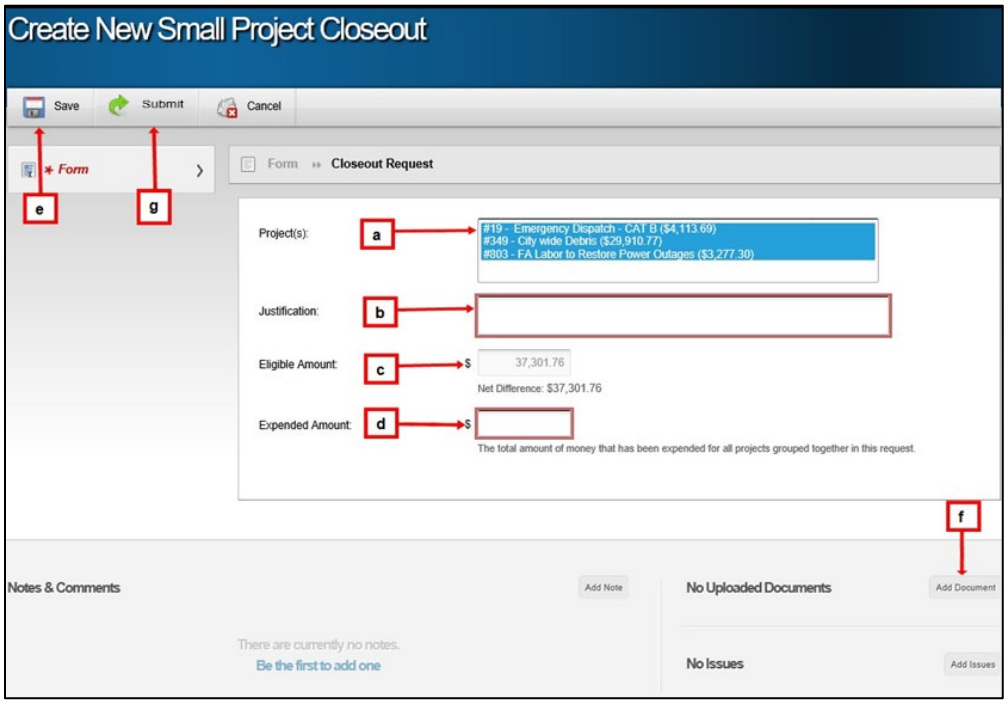


4. Select ***"New Small Project Closeout"*** to be navigated to the form.



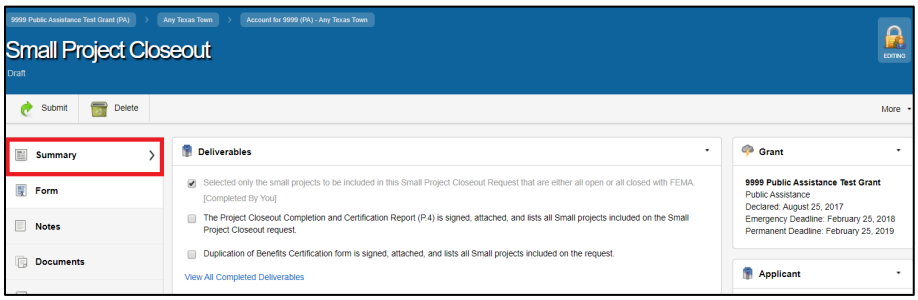
5. The form will display. Complete the form:
    a. ***"Projects"*** will be highlighted in blue. Select the projects that you would like to close. Click on a specific project to close that one project; to select multiple projects, hold down the Ctrl key and click on each project that you would like to close.
    b. Enter the ***"Justification"*** for the Small Project Closeout.
    c. The ***"Eligible Amount"*** is a pre-populated field based on the projects selected in step "a" above.
    d. Enter ***"Expended Amount"*** for the project(s).
    e. Click ***"Save"*** *(the form can be saved without submitting, and retrieved at a later time from the* ***"Drafts"*** *under your* ***Inbox*** *menu)*. The form must be saved before attaching any documents.
    f. Click on the ***"Add Document"*** button to upload additional documentation, if necessary.
    g. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

Small Project Closeout Form

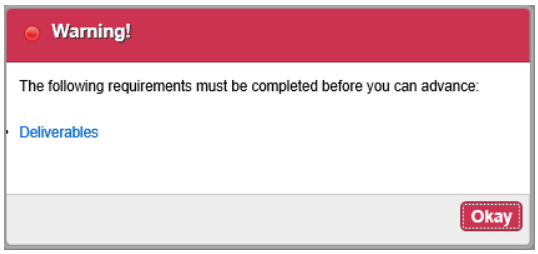


6. After you have saved the form, click the ***"Summary"*** tab on the left side menu, to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

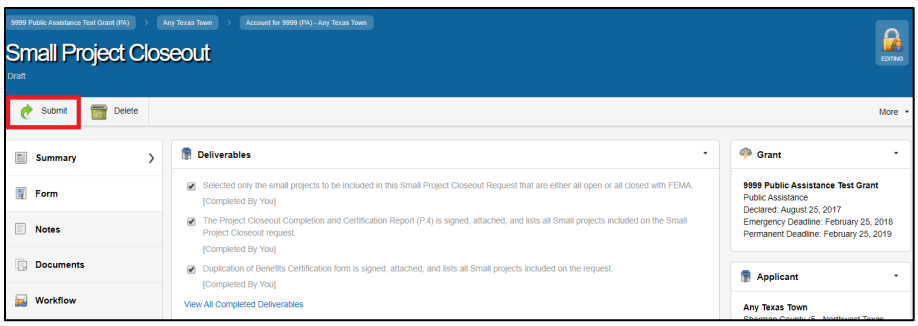
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted.*



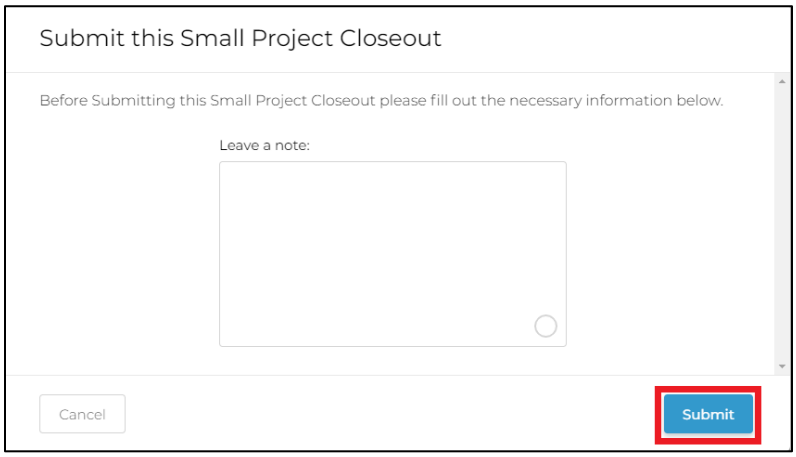
7. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



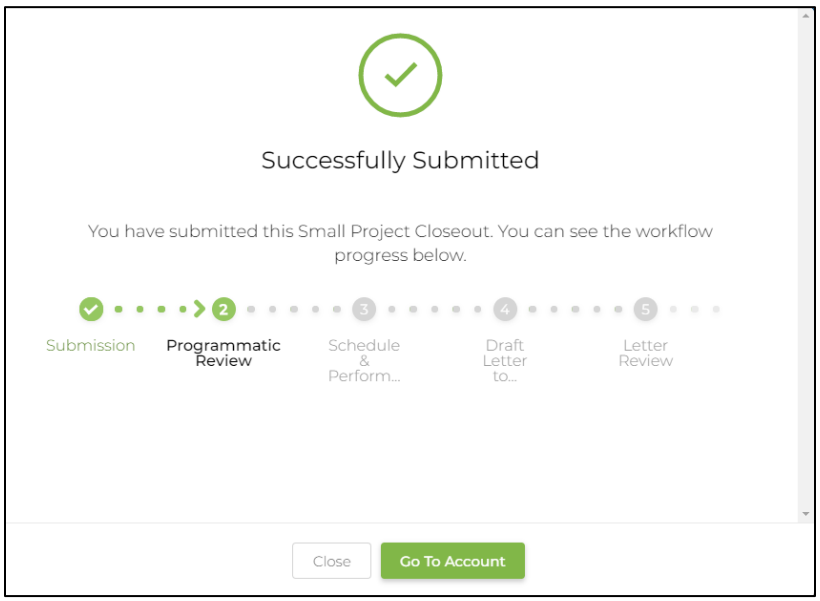
8. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



9. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

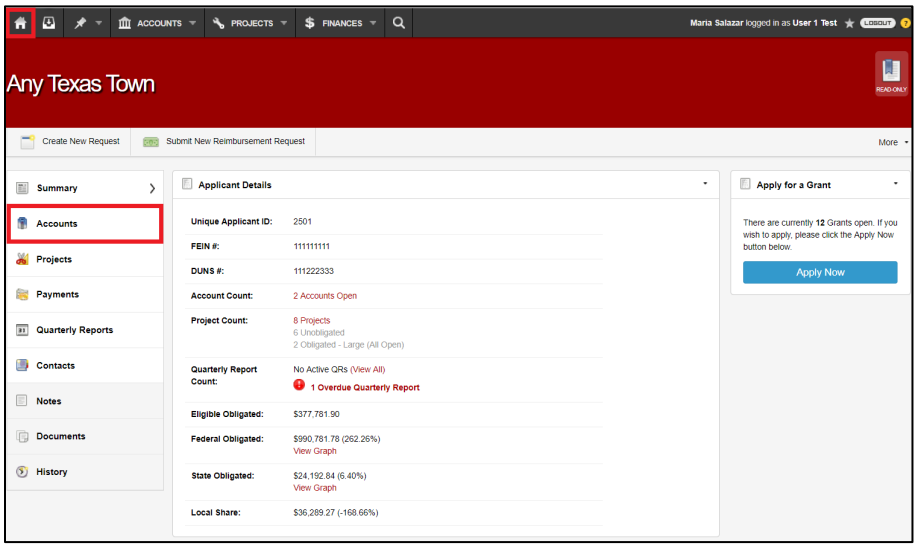


10. A notification will display letting you know that the **Small Project Closeout** was successfully submitted. Select the button for the desired action. ***"Close"*** the window, or ***"Go to Account."***

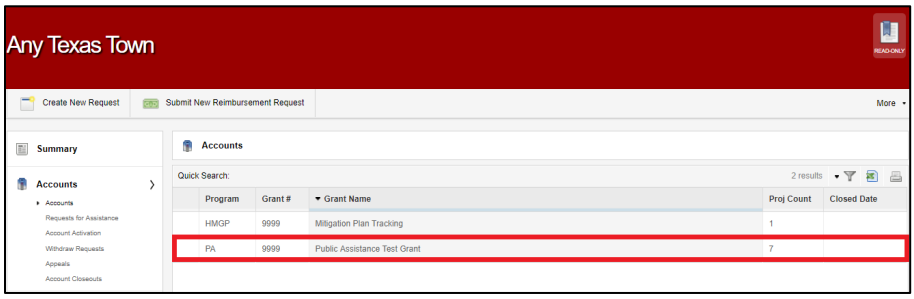


Large Project Closeout

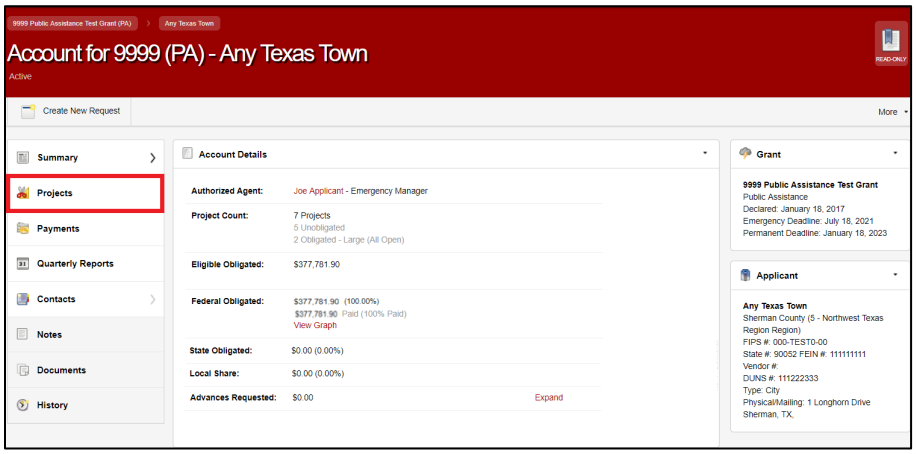
1. From the **Home** screen, select ***"Accounts."*** If you represent more than one organization, must select the Applicant first.



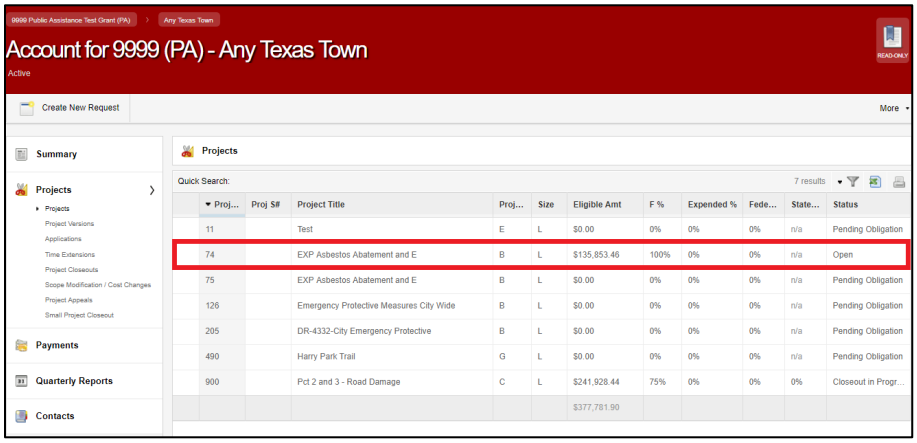
2. Select the ***"Account"*** that contains the **Project** that needs to be closed out. The system will navigate to that account *(lines are hyperlinked)*.



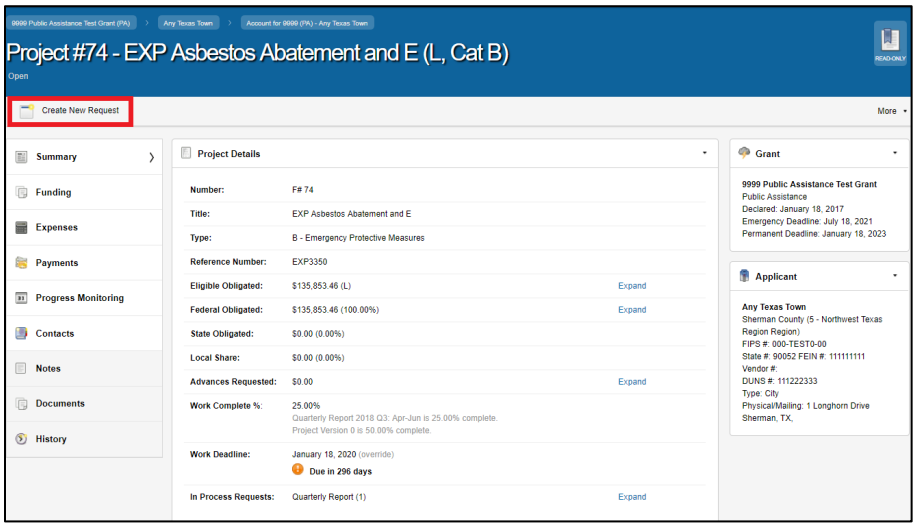
3. Select the ***"Projects"*** tab to the left of the **Account Details** screen to bring up a list of projects for this grant.



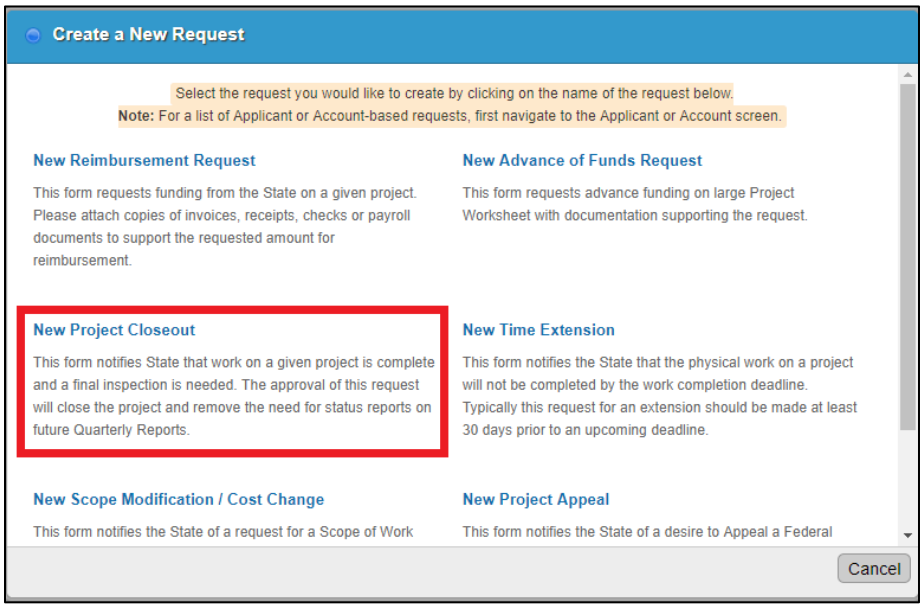
4. A list of Projects will display. Select the ***"Project"*** that will be closed out.



5. The **Project Details** Summary screen will be displayed. Click the ***"Create New Request"*** button.

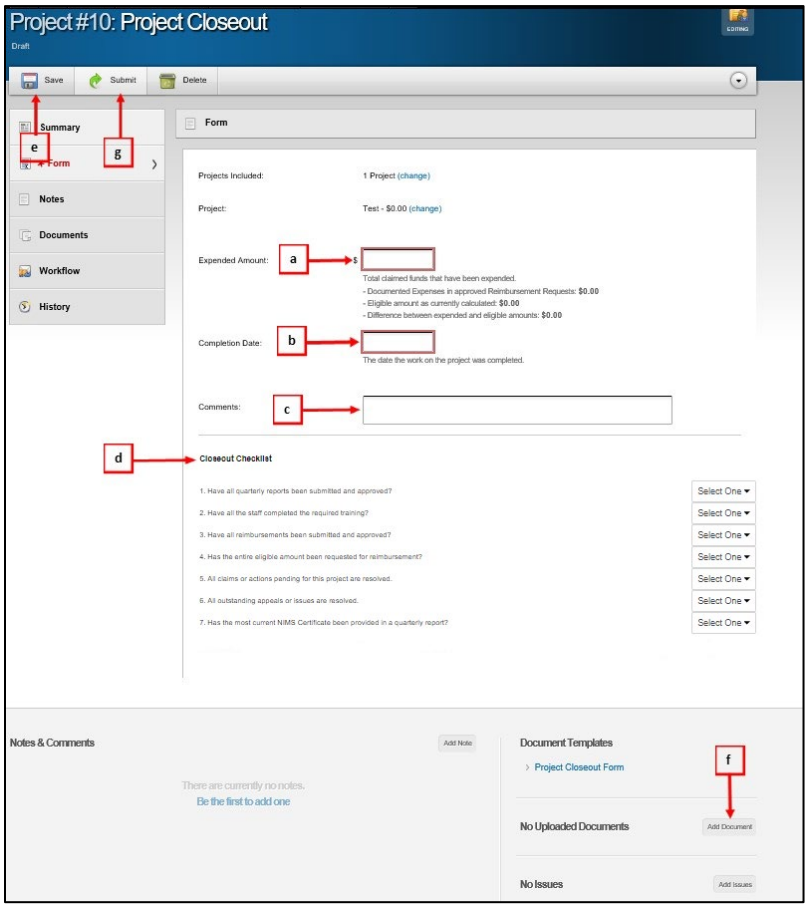


6. Select ***"New Project Closeout"*** to be navigated to the form.



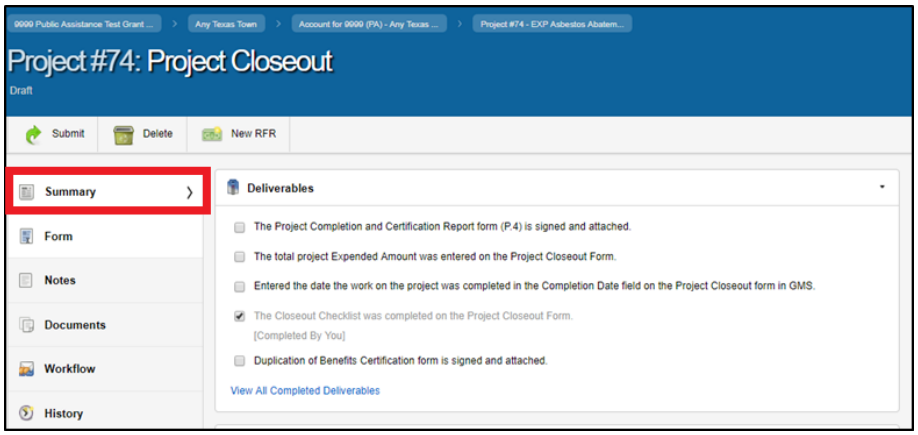
7. The form will display. Complete the form:
    a. Enter the ***"Expended Amount"*** of the Project.
    b. Enter the ***"Completion Date"*** of the Project.
    c. Enter ***"Comments"*** (any additional information that might need to be known).
    d. Answer the ***"Closeout Checklist"*** questions regarding the project.
    e. Click ***"Save"*** *(the form can be saved without submitting, and it can be retrieved at a later time from* ***"Drafts"*** *under the* ***Inbox*** *menu)*. The form must be saved before attaching any documents.
    f. Click the ***"Add Document"*** button to upload required documentation.
    g. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

Project Closeout Form (Large)

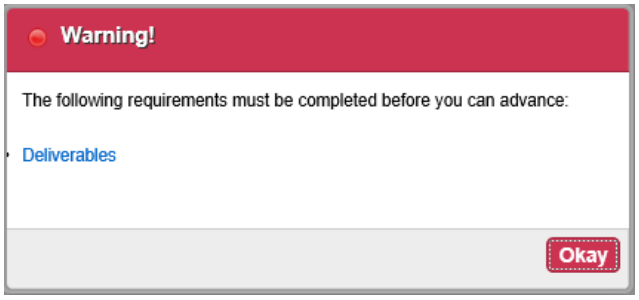


8. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables.** Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

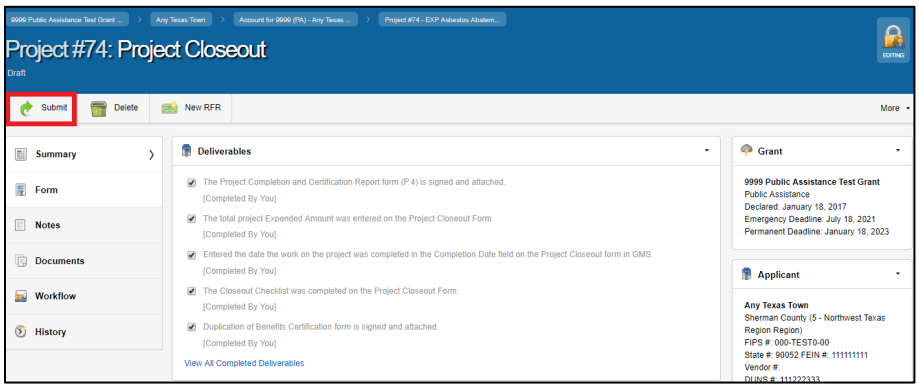
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted.*



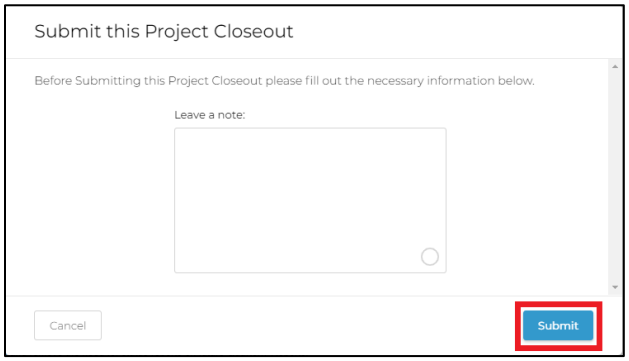
9. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



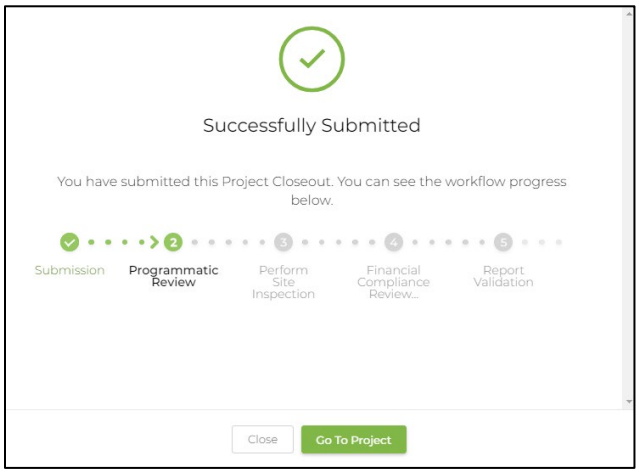
10. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



11. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

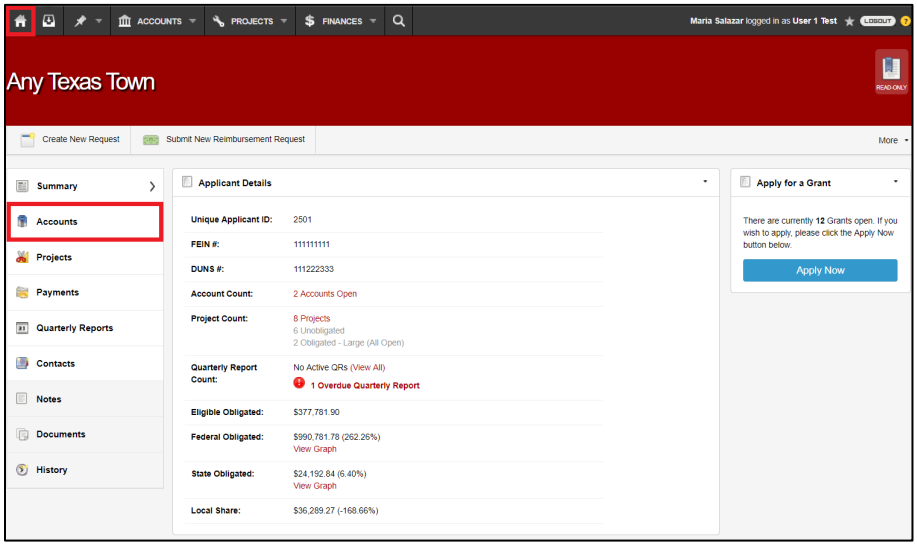


12. A notification will display letting you know that the **Project Closeout** was successfully submitted. You may ***"Close"*** the window, or ***"Go to Project."***

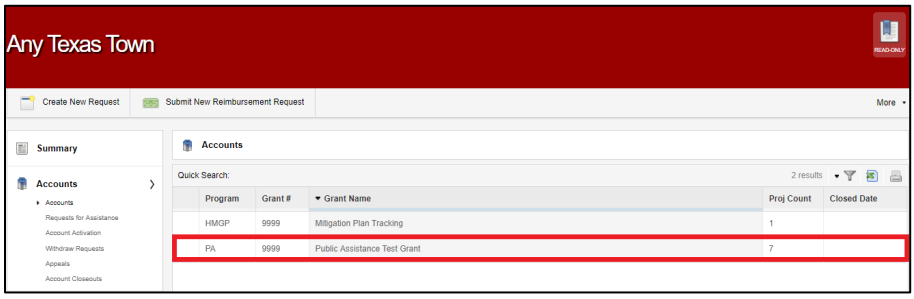


Create Project Appeal

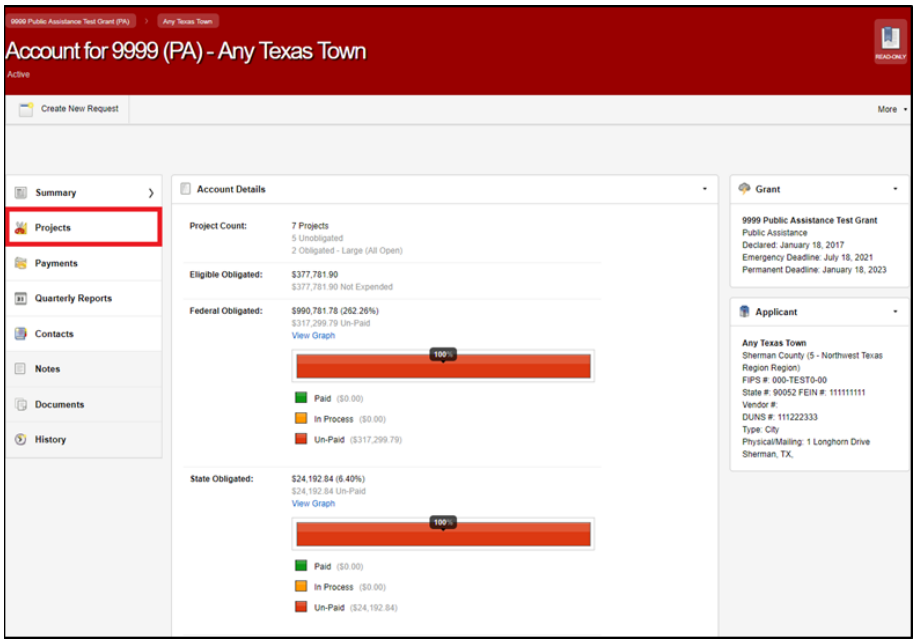
1. From the **Home** screen, select the ***"Accounts"*** tab from the left side menu. If you represent more than one organization, select the Applicant first.



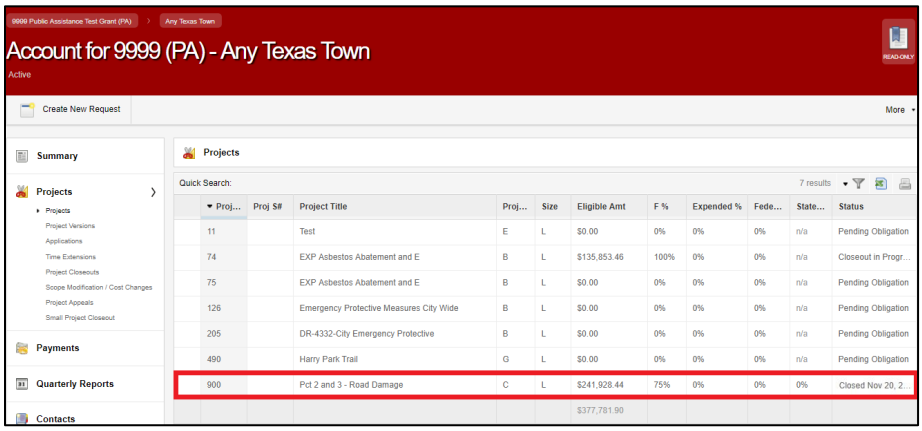
2. Select the ***"Account"*** that contains the **Project** that needs the **Appeal**. The system will navigate to that account *(lines are hyperlinked)*.



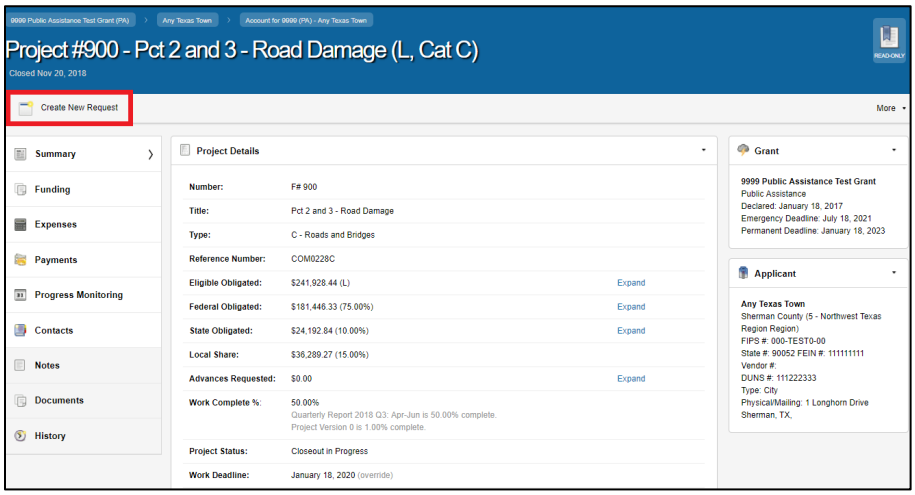
3. Select the ***"Projects"*** tab to the left of the **Account Details** screen to bring up a list of projects for this grant.



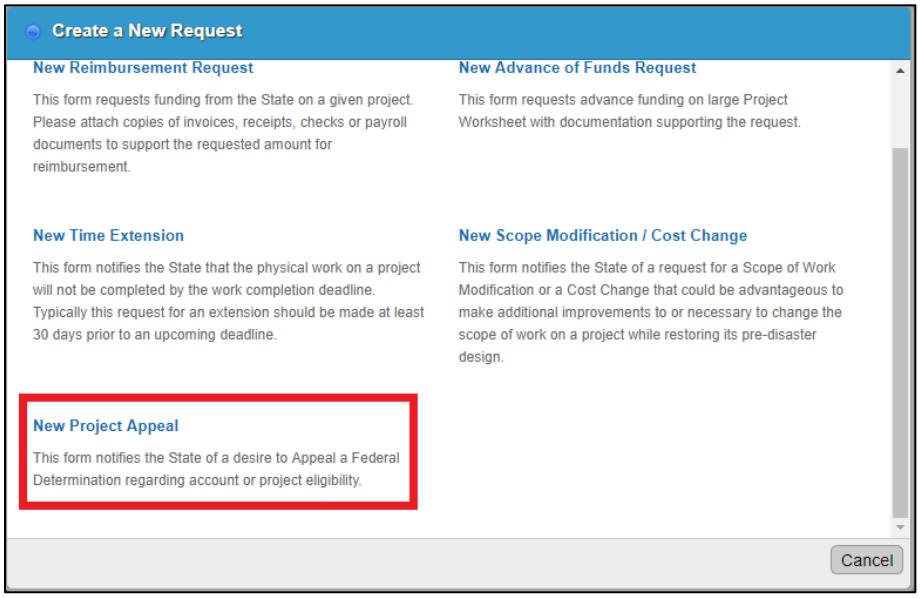
4. A list of Projects will display. Select the ***"Project"*** to be **Appealed**.



5. The **Project Details** Summary screen will display. Click the ***"Create New Request"*** button.



6. Scroll down, and select ***"New Project Appeal"*** to be navigated to the form.

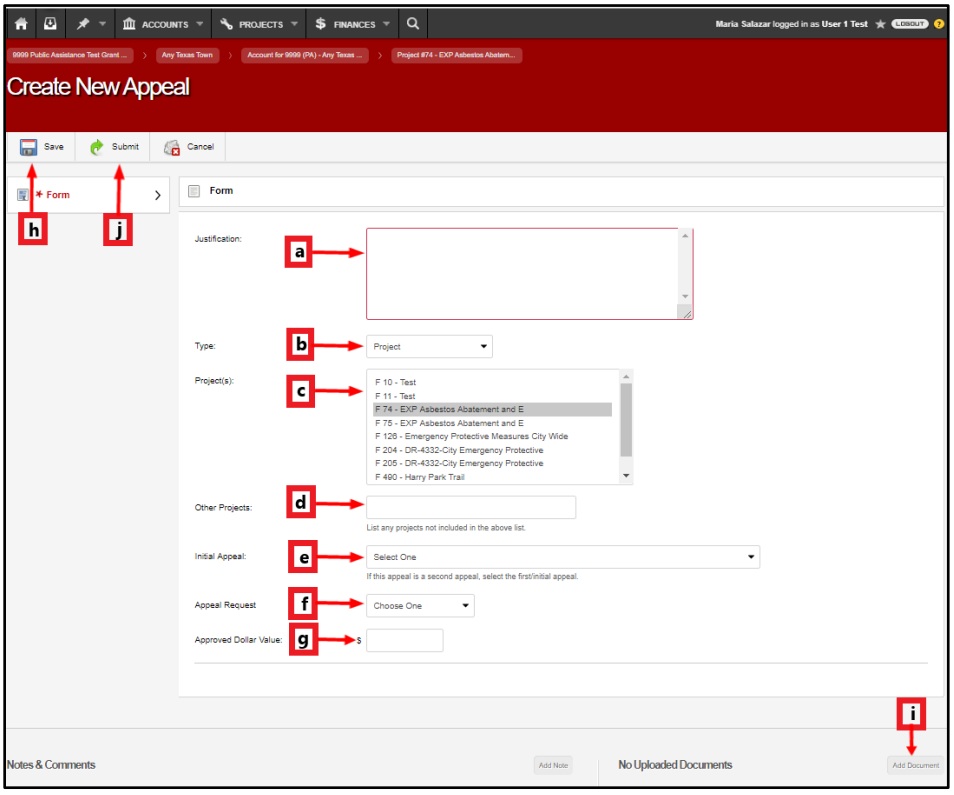


7. The form will display. Complete the form:
   a. Enter the ***"Justification"*** *(why project appeal is needed)*.
   b. Select ***"Type"*** of Appeal from the drop down menu *(Project in this case)*.
   c. Select ***"Project(s)."*** A list of projects will be displayed. The project navigated from will be highlighted. More than one project can be selected by holding

down the Ctrl key on your key board, and clicking on the other projects that you would like to appeal.

d. Enter ***"Other Projects"*** that are being appealed, but are not listed in the ***"Project(s)"*** field above.
e. If this appeal is a second appeal, select the first/initial appeal from the drop down menu under ***"Initial Appeal."***
f. Select ***"Appeal Request"*** from the drop down menu.
g. Enter ***"Approved Dollar Value."***
h. Click ***"Save"*** *(the form can be saved without submitting, and retrieved at a later time from your* ***"Drafts"*** *under the* ***Inbox*** *menu).* The form must be saved before attaching any documents.
i. Click the ***"Add Document"*** button to upload required documentation.
j. Click the ***"Submit"*** button when the form is complete, and you have checked to make sure that the **Deliverables** on the **Summary** tab were completed.

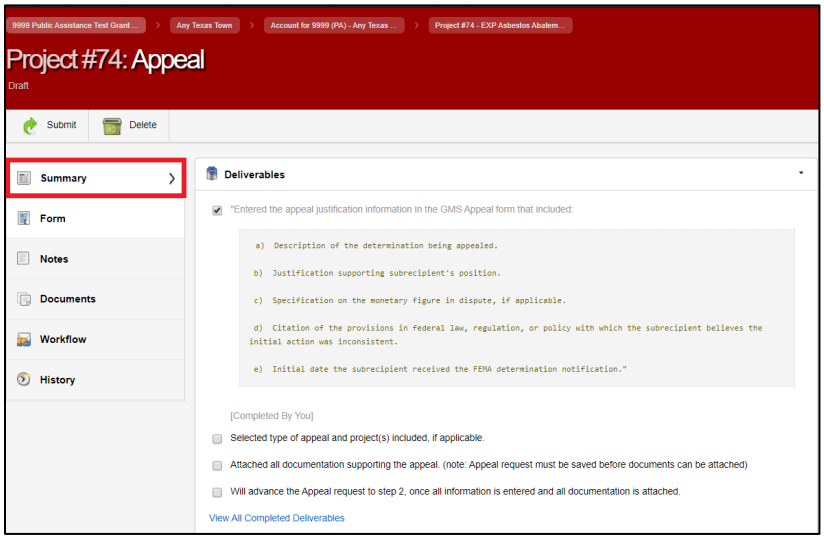
Appeal Form



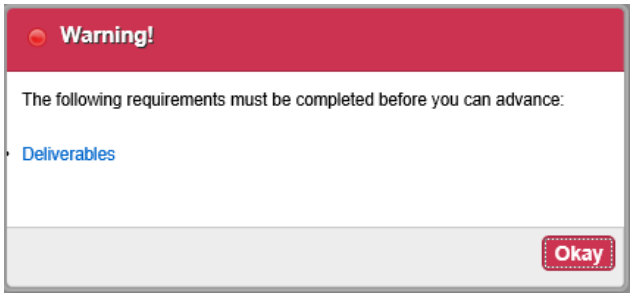
Note: *The appeal must contain documented justification supporting the appeal including monetary amount in dispute. It must also include a citation of the provisions in federal law, regulation, or policy with which you believe the initial action was inconsistent.*

8. After you have saved the form, click the ***"Summary"*** tab on the left side menu, to view the **Deliverables**. Verify that you have completed all deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

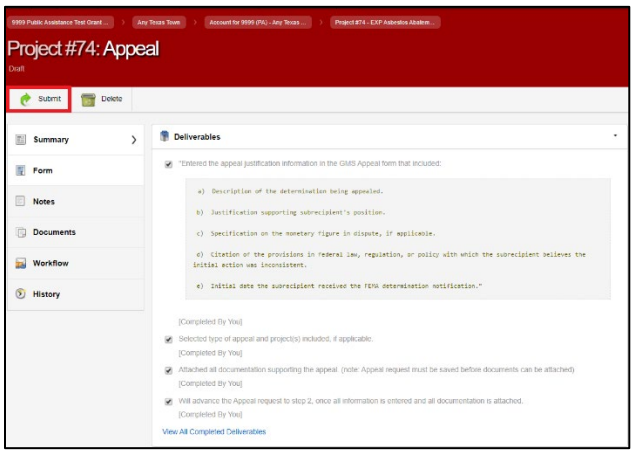
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted.*



9. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.

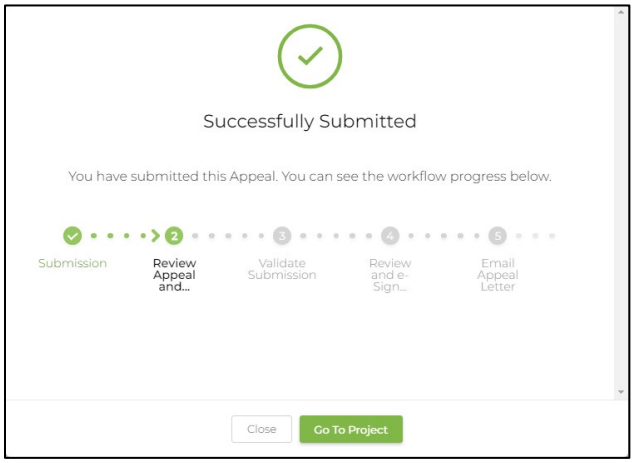


10. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



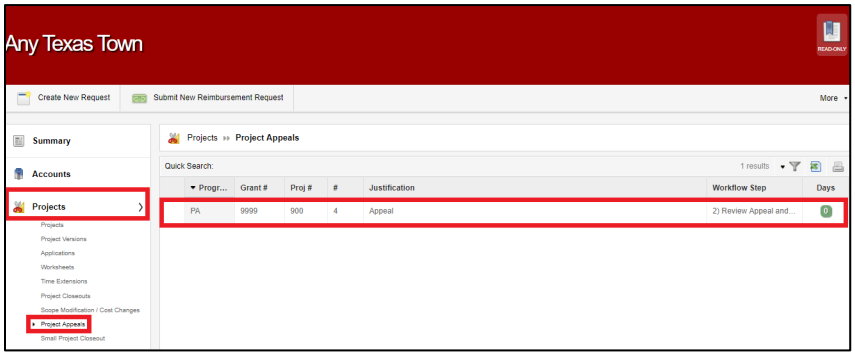
11. You may leave a note when this window is displayed. Click the ***"Submit"*** button.

12. A notification will display letting you know that the **Appeal** was successfully submitted. You may ***"Close"*** the window, or ***"Go to Project."***

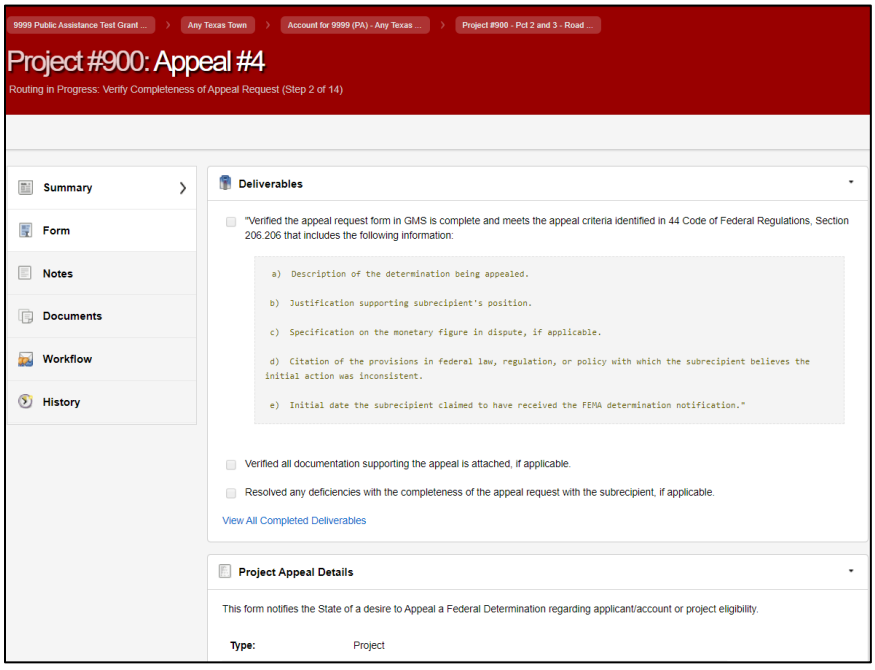


Look Up an Existing Appeal

1. Go to the **Projects** or **Accounts** on the left tab menu. Click on whichever one you are searching. For **Project Appeals**, click the ***"Projects"*** tab, and then ***"Project Appeals."*** For **Account Appeals**, click the ***"Accounts"*** tab, and then ***"Appeals."*** If there is an existing Appeal, it will be display. Click the item to be navigated to that Appeal *(lines are hyperlinked)*.

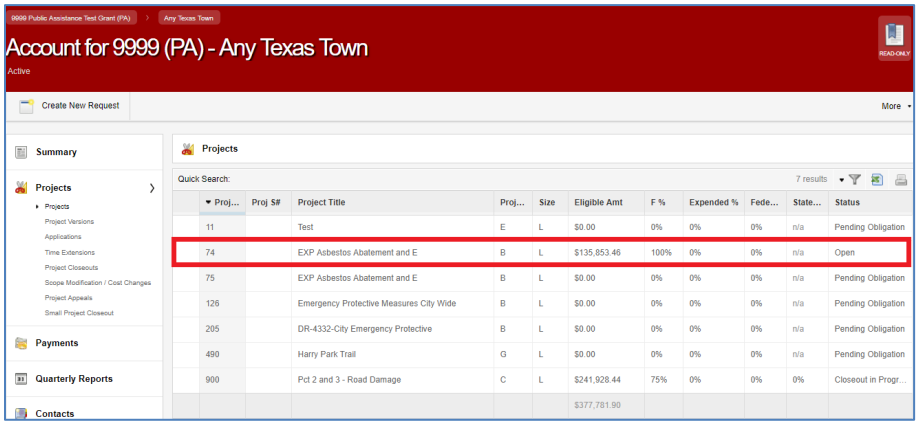


2. Details of the **Appeal** will be displayed. In this example the **Project Appeal** is in Step 2, and the Deliverables need to be completed by the Support Affiliate (CohnReznick) before advancing to the next step. The Appeal form that was submitted can also be viewed by clicking the ***"Form"*** tab on the side menu.

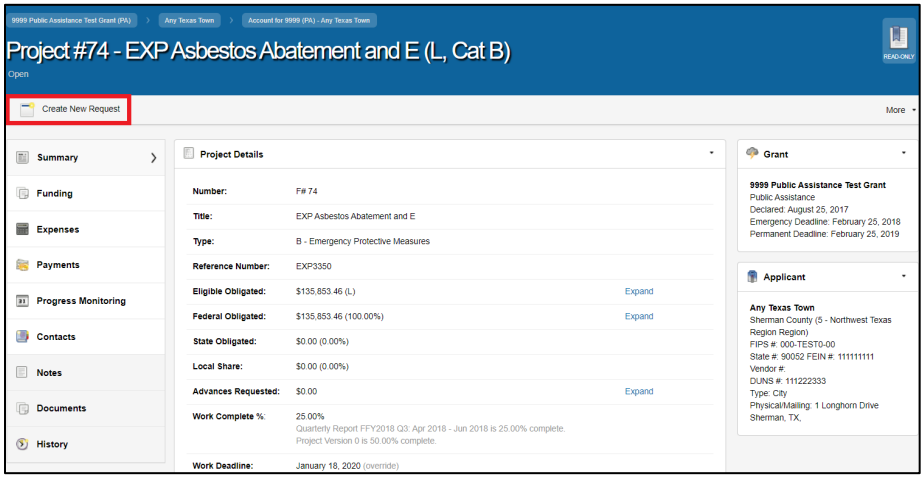


Advance of Funds Request

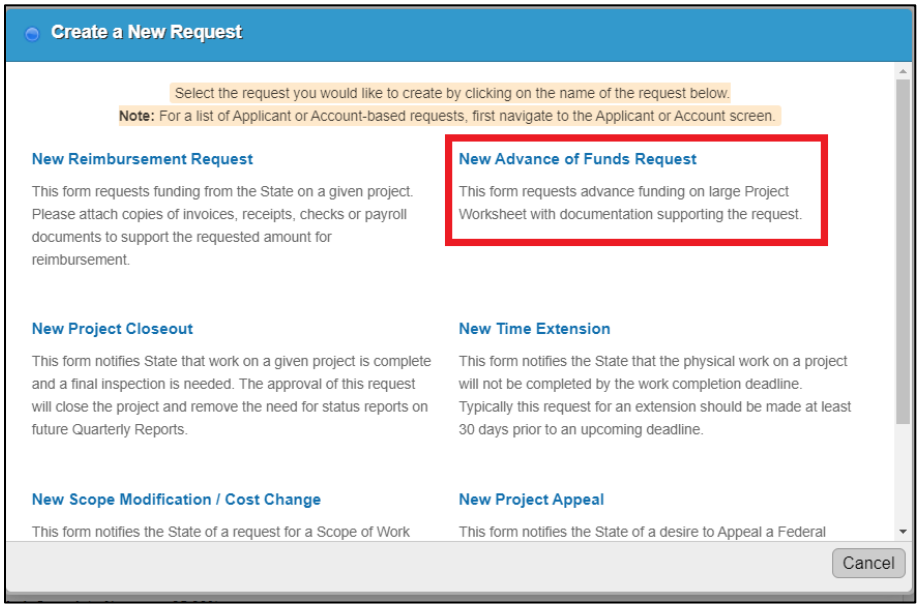
1. Navigate to the ***"Projects"*** page for the desired grant. Select the ***"Project"*** for the **Request for Advance**.



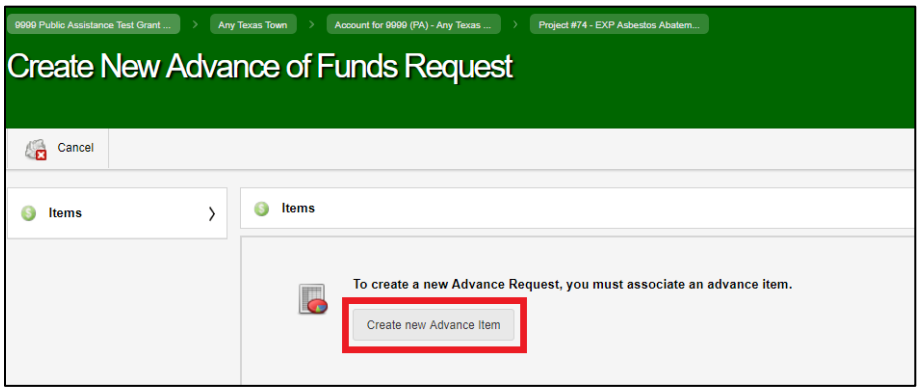
2. At the **Project Details** summary page, click on the ***"Create New Request"*** button.



3. Select ***"New Advance of Funds Request"*** to be navigated to the form.

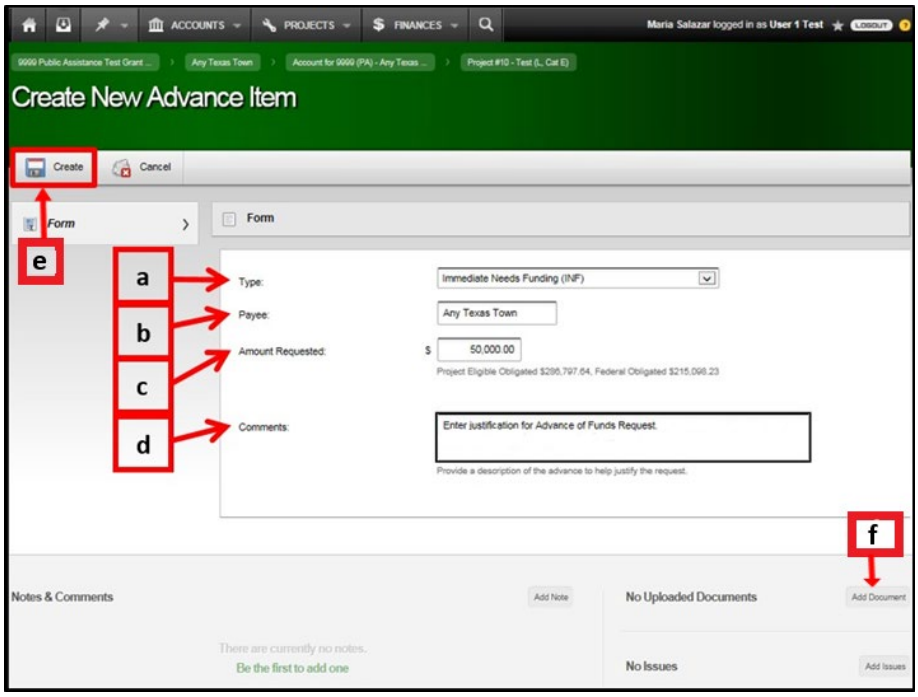


4. Click the ***"Create new Advance Item"*** button.

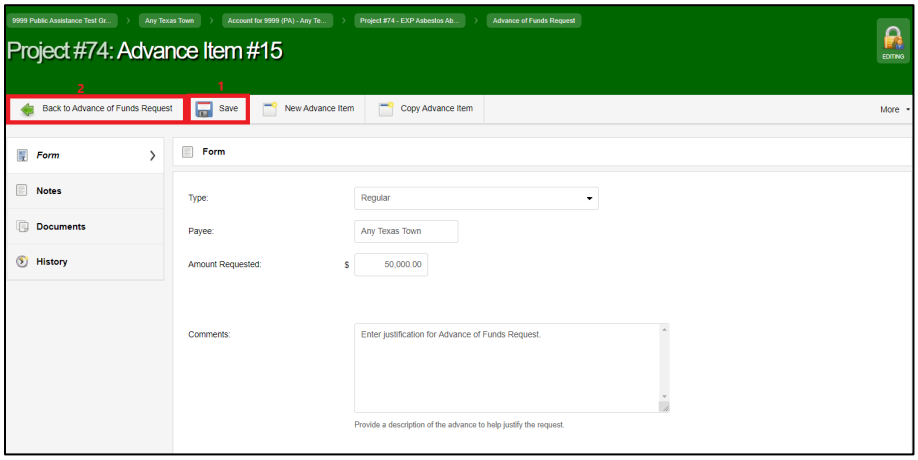


5. The form will display. Complete the form:
    a. Select ***"Type"*** of funding needed from the drop down menu.
    b. Enter ***"Payee"*** name.
    c. Enter dollar ***"Amount Requested."***
    d. Add ***"Comments"*** to justify the request.
    e. Click the ***"Create"*** button to establish the form.
    f. Click the ***"Add Document"*** button to upload required documentation.

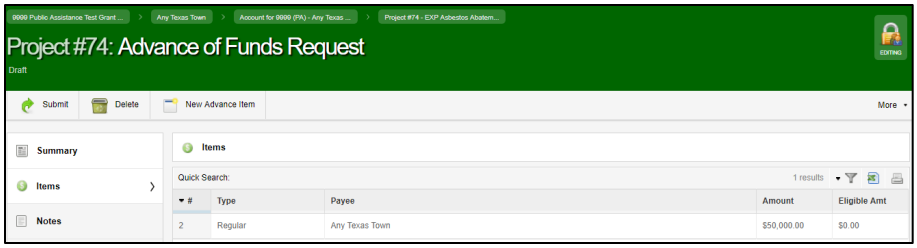
Advance of Funds Request Form



6. Review the information on the form, make any necessary changes, and click the ***"Save"*** button. Next, click the ***"Back to Advance of Funds Request"*** button.

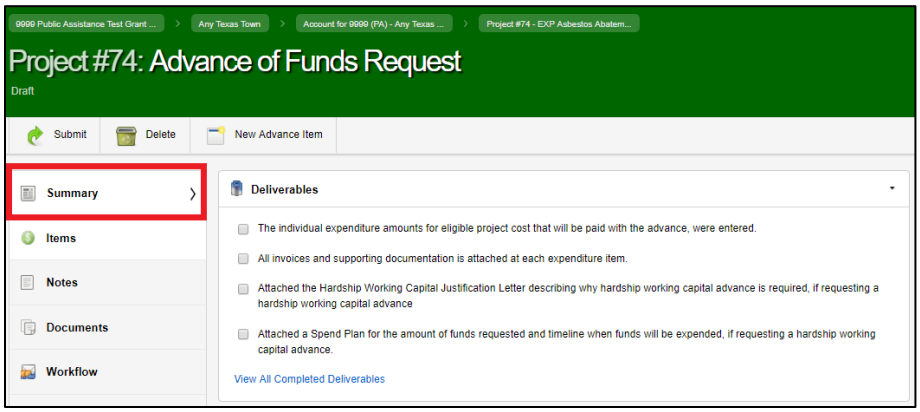


7. At this screen, you can enter a ***"New Advance Item,"*** or ***"Delete"*** the request if you made an error. The request is still in draft form.

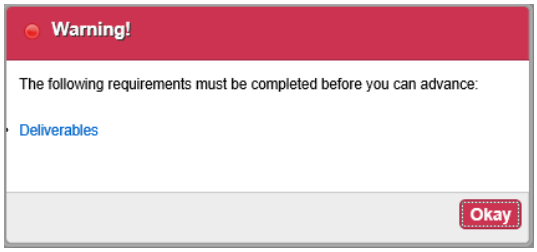


8. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables.** Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

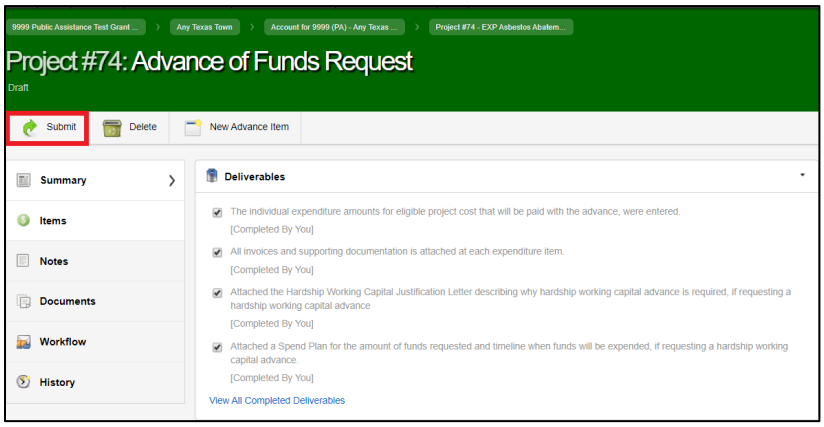
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted. The Deliverable must be checked off even though it may not be applicable.*



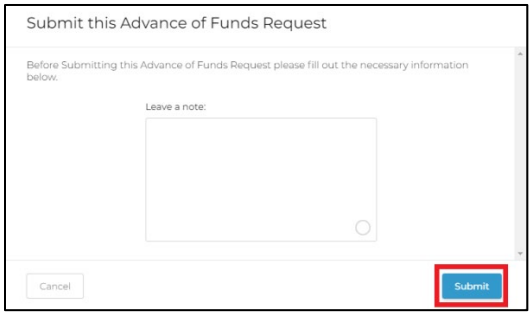
9. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



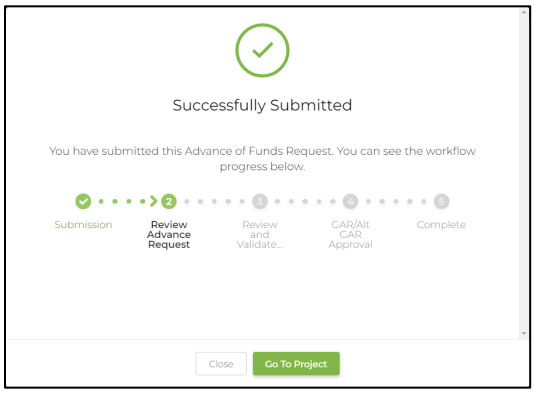
10. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



11. You can leave a note when this window is displayed. Click the ***"Submit"*** button when done.



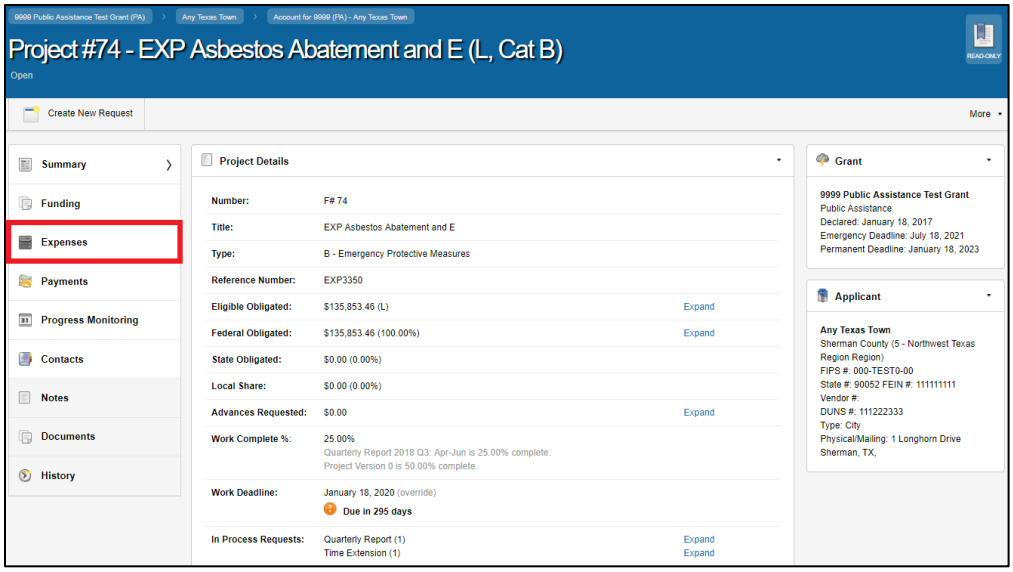
12. A notification will display letting you know that the **Advance of Funds Request** was successfully submitted. You may ***"Close"*** the window, or ***"Go to Project."***



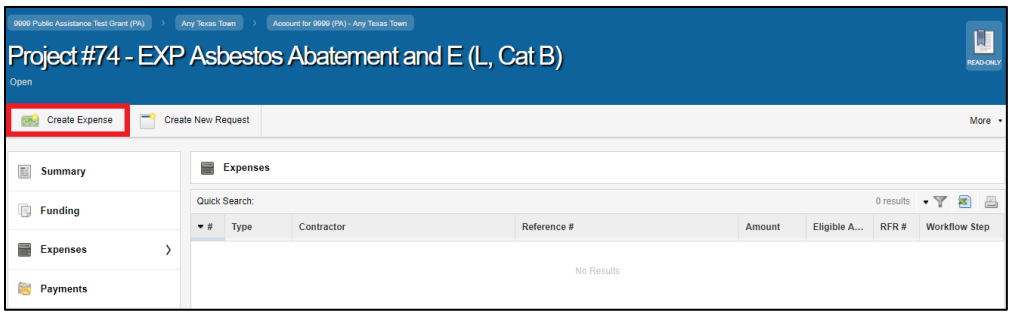
Create a New Expense

1. A new Unlinked Expense must be created from the Project screen of the project for which the request is to be created. Navigate to the relevant project.

2. On the Project screen, click the ***"Expenses"*** tab located on the left of the screen.

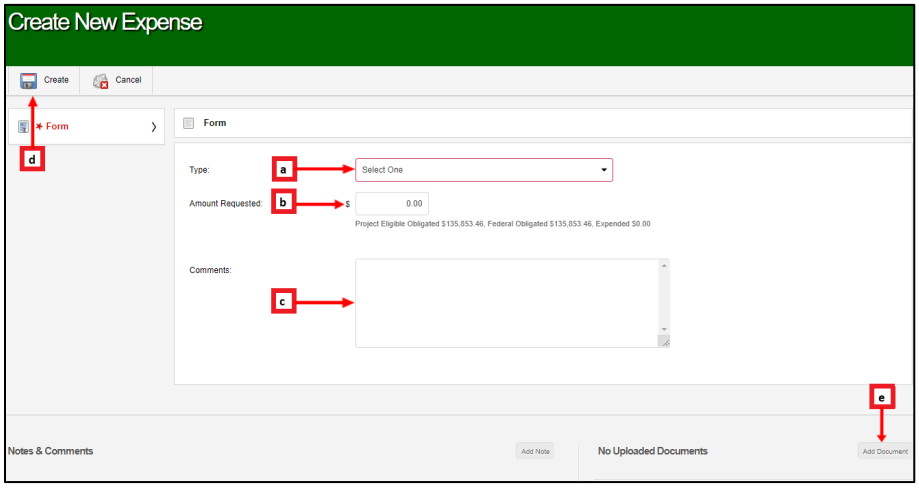


3. A listing of current Expenses (both linked and unlinked) for this project will display. Click on the "***Create Expense"*** button to open a new draft **Expense** form.



4. The form will display. Complete the form:
    a. Select the ***"Type"*** of Expense from the drop down menu.
    b. Enter the ***"Amount Requested."***
    c. Enter ***"Comments"*** *(any additional information that might need to be known)*.
    d. Click the ***"Create"*** button when the form is complete.
    e. Click the ***"Add Document"*** button to upload the document from which the Expense was entered.

Note: *Ensure the document to be uploaded has been given the proper label before uploading in Step "e" above.*



Types of Expenses:

- **A/E Contract Costs** – Architectural or Engineering Contract Costs *(do not include Construction Costs in this expense type)*.
- **Consultant Costs** – Include costs of a consultant to assist in writing a Hazard Mitigation Action Plan or Pre-Disaster Mitigation Plan. Also include costs of a contracted vendor to provide administrative services necessary to participate in the grant program Direct Administrative Cost (DAC).
- **Contract Work Summary** – A form used to document contract work performed for eligible projects.

TEXAS DIVISION OF EMERGENCY MANAGEMENT

CONTRACT WORK SUMMARY RECORD

Page 1 of 1

1. APPLICANT	2. PA ID	3. PW #	4. DISASTER NUMBER
Any Texas Town	000-TEST0-00	10	9999
5. LOCATION/SITE		6. CATEGORY	7. PERIOD COVERING
Any County		F	12-29-17 to 1-16-18

8. DESCRIPTION OF WORK PERFORMED

Repaired and replaced damaged X arms and Utility Poles. Pulled the utility truck as needed and cleared roads. Load haul and dispose of damaged poles, roll wire on poles and clean up misc. trash

DATES WORKED	CONTRACTOR	BILLING/INVOICE NUMBER	AMOUNT	COMMENTS—SCOPE
12-29-2017 to 1-16-2018	Joe Contractor	43762	$ 415,260.88	See attached invoices with back up
1-7-18 to 1-15-18	Jim Contractor	43697	$ 12,420.00	See attached invoices with back up
1-3-18 to 1-7-18	J & M Contracting	44057	$ 7,950.00	106 poles @75.00/pole
to			$	
to			$	
to			$	
to			$	
to			$	
to			$	
to			$	
GRAND TOTAL			$ 435,630.88	

I CERTIFY THAT THE ABOVE INFORMATION WAS OBTAINED FROM PAYROLL RECORDS, INVOICES, OR OTHER DOCUMENTS THAT ARE AVAILABLE FOR AUDIT.

CERTIFIED	TITLE	DATE

- **Debris Monitoring** – Include contractor costs to provide monitoring and oversight of the debris removal process.
- **Debris Removal** – Include contractor costs to physically remove and dispose of debris.
- **Direct Administrative Cost (DAC)** – Includes costs that can be tracked, charged, and accounted for directly to a specific project, such as staff time to complete field inspection, and preparation of a PW (Project Worksheet).
- **Force Account Equipment (FAE)** – Certain ownership and operating costs for force account *(applicant-owned)* equipment used to perform eligible work are eligible. Costs for use of automobiles and pick-up trucks may be reimbursed on the basis of mileage, if less costly than hourly rates. For all other types of equipment, costs are reimbursed using an hourly rate. Reimbursable equipment rates typically include operation *(including fuel)*, insurance, depreciation, and maintenance; however, they do not include the labor of the operator. Stand-by time for equipment is not eligible. However, if an applicant uses equipment intermittently for more than half of the normally scheduled working hours for a given day, use for the entire day may be claimed if adequate documentation is submitted. Equipment that is used for less than half of the normally scheduled working day is reimbursable only for the hours used.
- **Force Account Labor (FAL)** – Defined as labor performed by the applicant's employees, rather than by a contractor. Force account labor costs associated with the conduct of eligible work may be claimed at an hourly rate.
- **Force Account Material** – The cost of supplies that were purchased or taken from an applicant's stock and used during the performance of eligible work.
- **Indirect/Allocated Costs** – Include costs to be passed through a Negotiated

Indirect Cost Rate Agreement, Cost Allocation Plan, or De Minimis Rate *(Management Costs)*.

- **Rentals & Leases** – Equipment/Property rented from a third-party *(not Applicant owned)*.
- **Small Project** – Those projects with a total estimated cost below the threshold; the threshold is adjusted each fiscal year to account for inflation and published in the Federal Register.
- **Travel Expenses -** Hotel costs, mileage/fuel, meals, and any other travel-related costs.

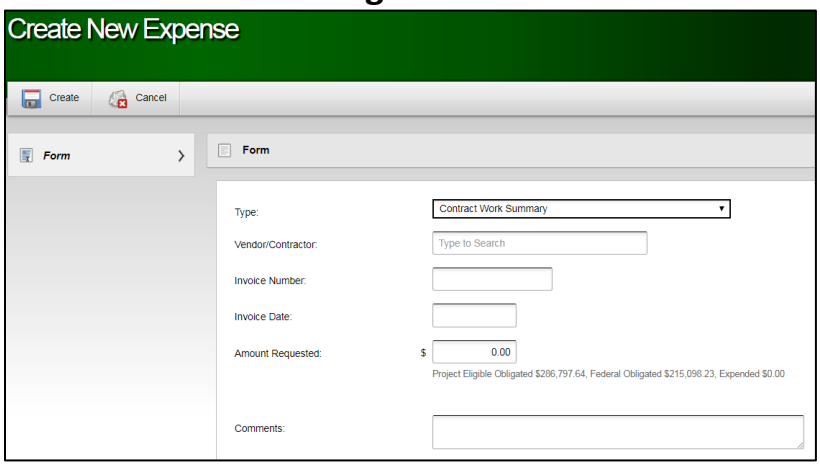
Do **not** select the following:
Final Compliance Review
FMAG 100% complete when written
Payroll (TDEM Internal)
Unassigned

Important: *As seen in **Figure 1**, each invoice submitted will need to be input individually, except for Force Account Labor (FAL) and Force Account Equipment (FAE) costs, **Figures 2** through **3;** see Figure **4** to see how other cost-types are input.*

The following is a list of **Expense** documents that will be needed:

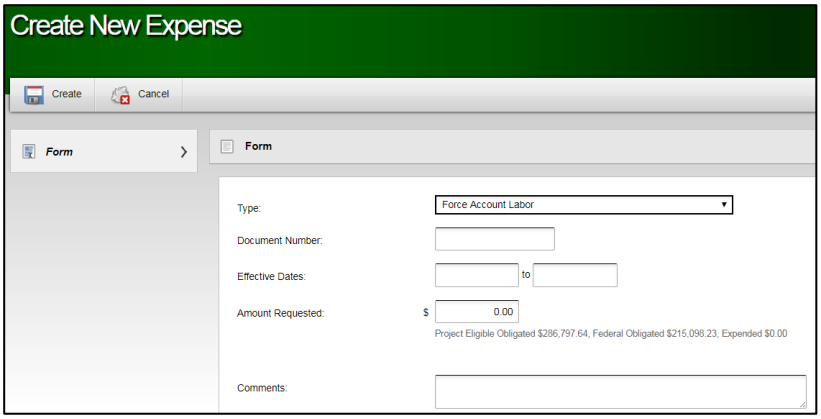
Compliance Review / Audit Report
Contract
Applicant's Claim Summary Form
Bid Advertisement
Bid Specification
Bid Summary Sheet
Cancelled Check / Bank Statement
Contract Award Document
Contract Selection Documents
Daily Supervisor Log
Debarment Check Documentation
Debris Removal
Delivery Ticket
Direct Administrative Cost
Force Account Equipment
Force Account Labor
Force Account Material
Force Account Rented Equipment
Invoice
Other – Engineering & Design Cost
Payroll Journal
Record of Work Inspection
Rental / Lease
Safe Room Management Fee
Travel / Reimbursement Voucher

Figure 1



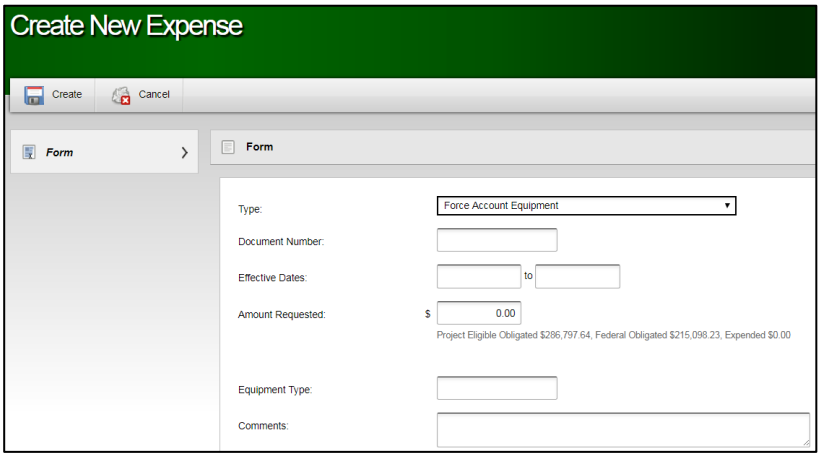
Note: *The Expense being entered is a Contract cost. Submit each invoice for reimbursement separately. This also applies for Contract Direct Administrative Cost (DAC). Additionally, costs incurred for Rented Equipment will be entered as* ***"Contract"*** *costs.*

Figure 2



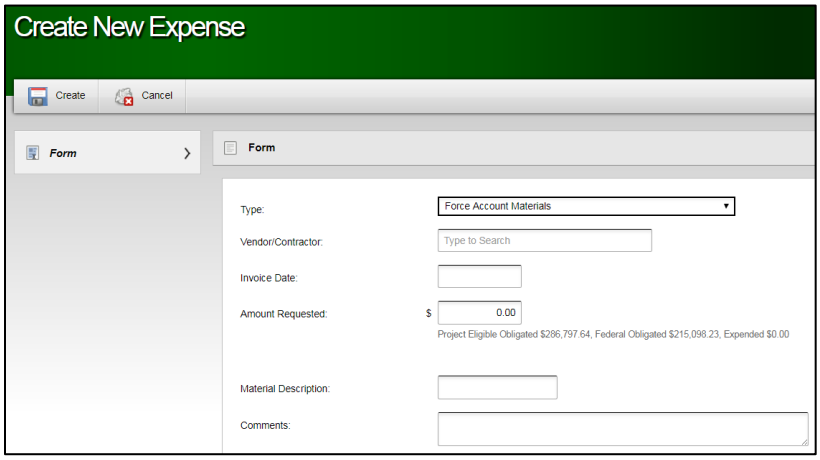
FAL and FAL DAC - enter the date range the Summary Record covers, enter the Grand Total from the Summary Record into ***"Amount Requested,"*** *and any pertinent comments.*

Figure 3



FAE and FAE DAC - enter the date range the Summary Record covers, enter the Grand Total from the Summary Record into ***"Amount Requested,"*** *and any pertinent comments.*

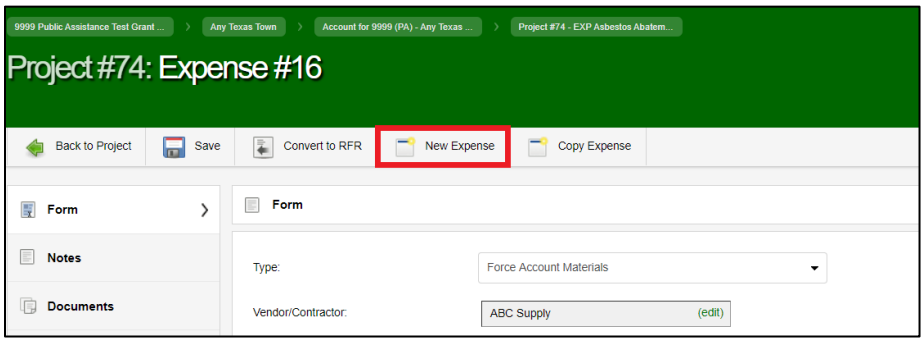
Figure 4



For each Materials invoice claimed and DAC Materials, enter the Vendor Name, Invoice Number, Invoice Date, Amount Requested for reimbursement, Description, and any pertinent comments.

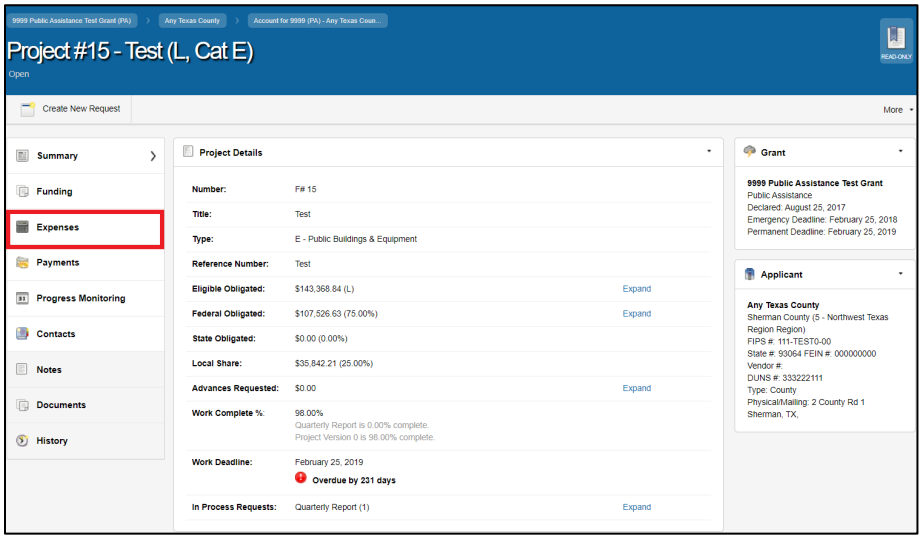
***Note:** The entire invoiced amount does not have to be requested in full for reimbursement. The applicant is responsible for specifying the amount applicable to a Project Worksheet (PW) if it is less than the invoiced amount.*

5. To add additional expenses, click the ***"New Expense"*** button. Repeat Step 4 -5 until all documented expenses have been entered.

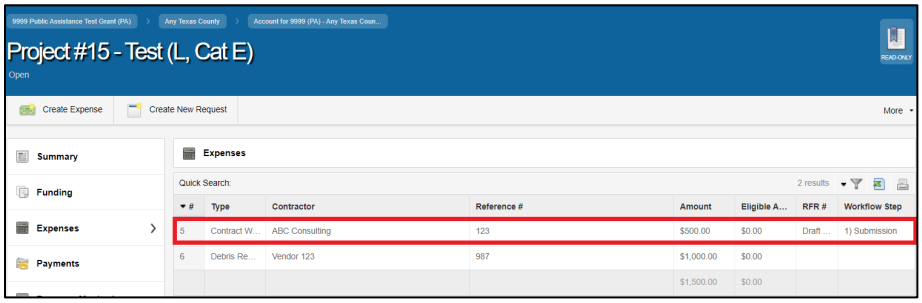


Convert Expenses to a Reimbursement Request

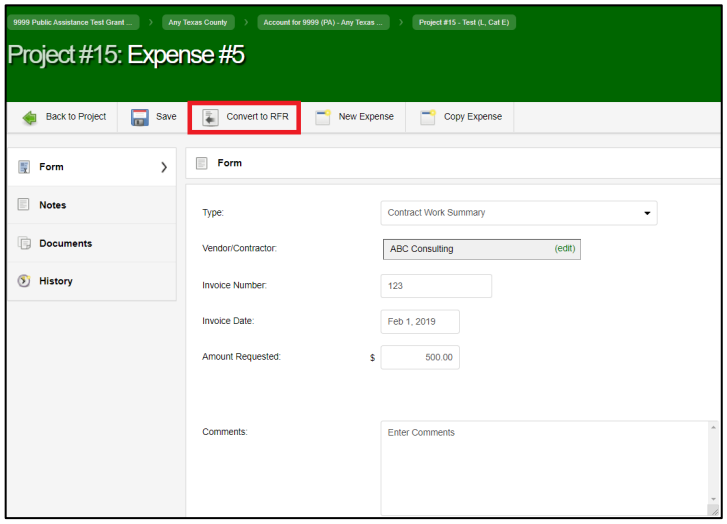
1. Navigate to the **Project Details** Summary screen for the desired **Project** and select ***"Expenses."***



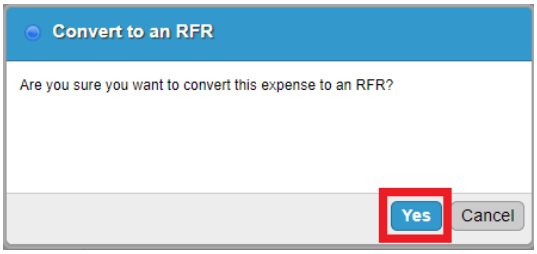
2. Select the ***"Expense"*** that you wish to convert to a **Request for Reimbursement (RFR)** *(lines are hyperlinked)*.



3. This will open the **Expense**. Click the ***"Convert to RFR"*** button.

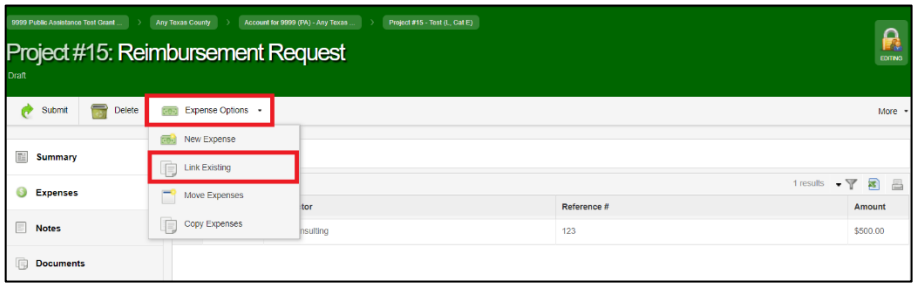


4. The following message will display asking if you are sure you want to covert the expense to an RFR. Click ***"Yes"*** to convert the Expense to an RFR. The RFR will still be in draft format until you ***"Submit"*** it.

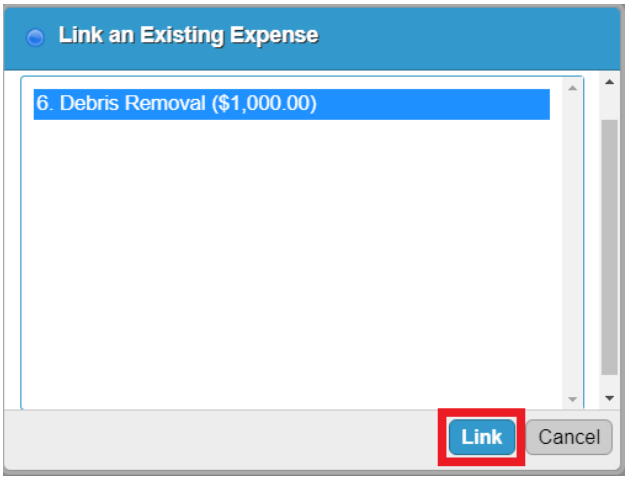


5. At this point you can choose to **Link** the other Expense *(listed in Step 2)* to this RFR. Click ***"Expense Options,"*** and select ***"Link Existing"*** from the drop down menu. The other options are to create a ***"New Expense"*** to link to this RFR. You can also select to ***"Move Expenses,"*** or ***"Copy Expenses"*** to another project.

   Note: *A reimbursement Request can have multiple expenses linked to it.*

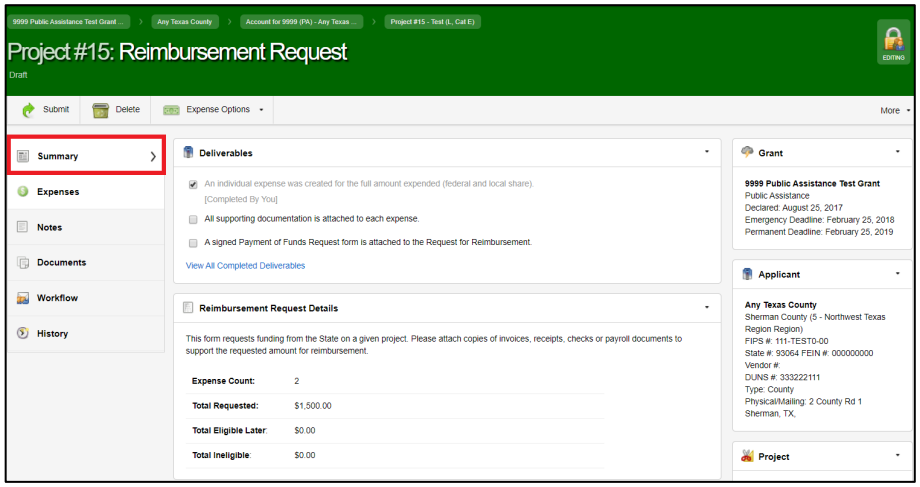


6. Select all expenses associated with the current **Reimbursement Request (RFR)** *(the Ctrl key allows selection of multiple expenses)*. Once all expenses to be converted to the **Reimbursement Request** have been selected, click the ***"Link"*** button.

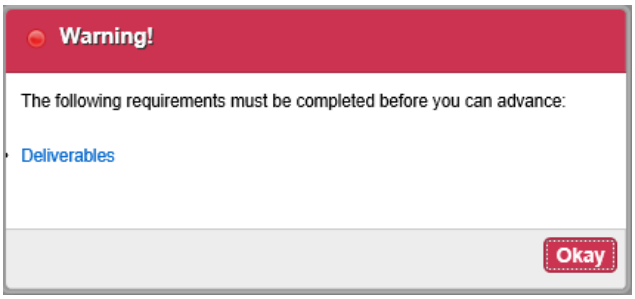


7. Click the ***"Summary"*** tab on the left side menu to view the **Deliverables.** Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

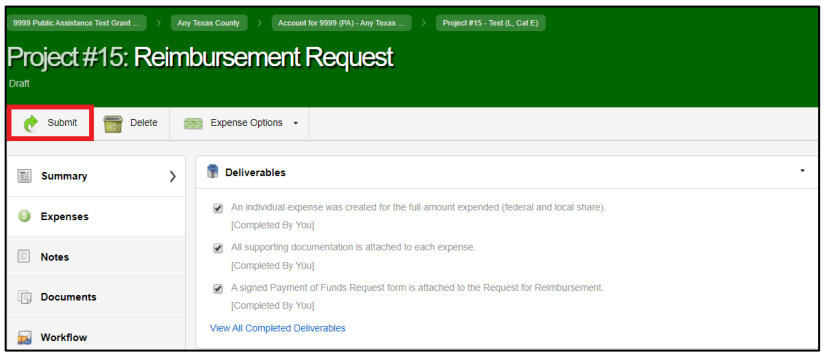
   Note: *Each **Deliverable** must be checked off/completed before the form can be submitted.*



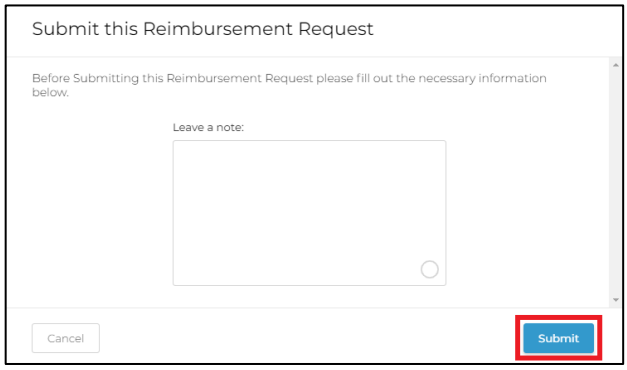
8. If you click the ***"Submit"*** button prior to verifying that all Deliverables have been completed, the following warning will display. Click the ***"Okay"*** button to return to the **Deliverables**.



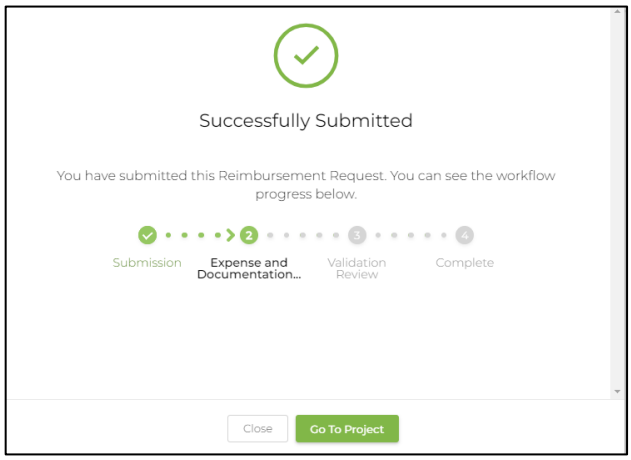
9. Click the ***"Submit"*** button when all of the **Deliverables** have been completed.



10. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.



11. A notification will display letting you know that the **Reimbursement Request** was successfully submitted. You may ***"Close"*** the window or ***"Go to Project."***



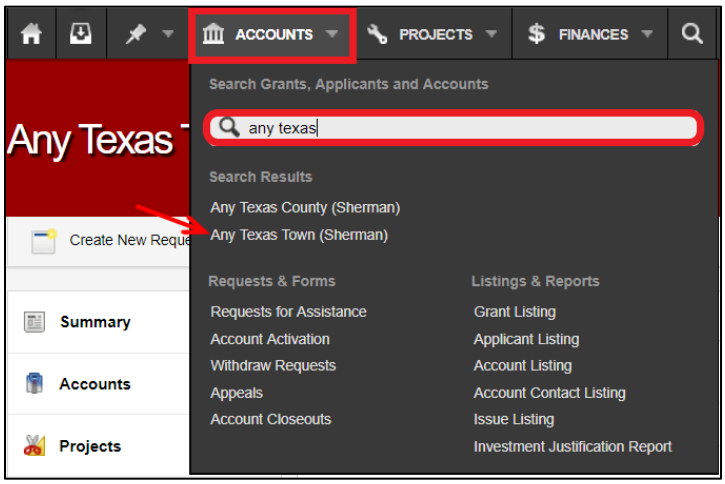
Note: *If you made an error and need to unlink or delete an expense, submit a Support Ticket.*

The following is a list of **Reimbursement Request** documents that will be needed:

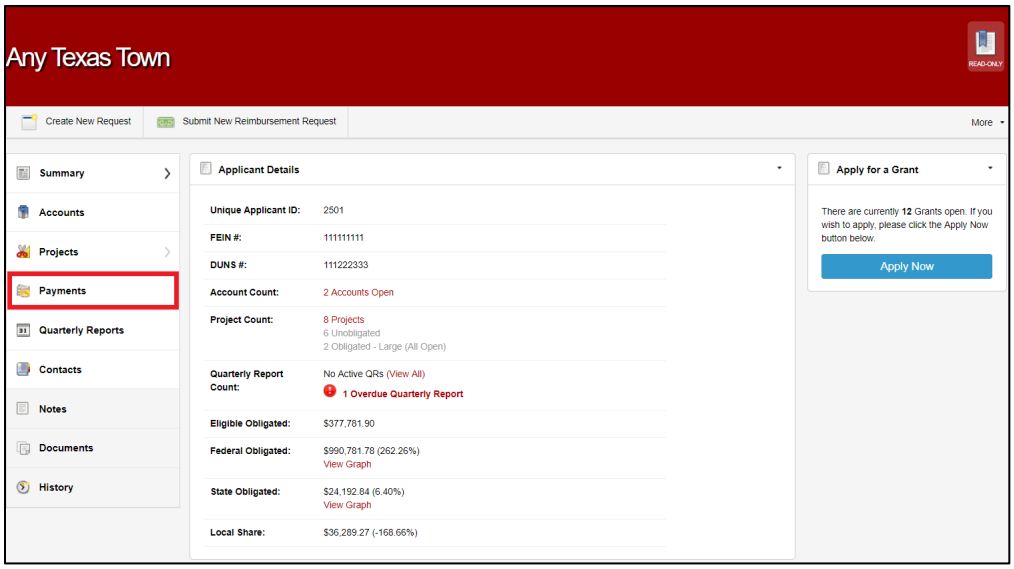
Compliance Review / Audit Report
Direct Deposit Authorization or RTI
Account Balance Report
Compliance Sample Selection Log
Compliance Test Sample
Compliance Testing Results
FEMA Correspondence
Quality Assurance Testing Worksheet
Reimbursement Request Summary

Look Up a Payment

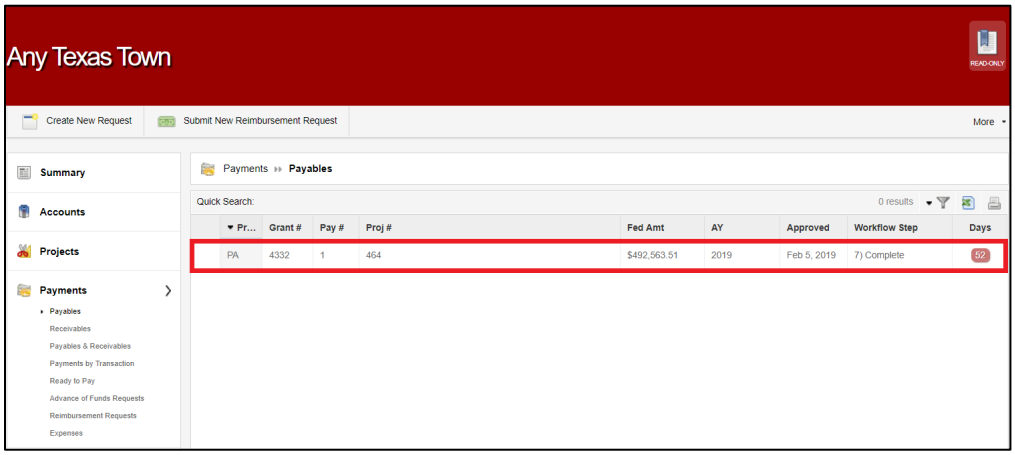
1. Click on the ***"Accounts"*** menu located on the **Main Menu** bar, and enter some or the entire Applicant Name in the white search bar *(if you represent multiple applicants)*. Results will display dynamically as you type. Select the **Applicant** for the payment you are searching. If you represent a single applicant the applicant information will be displayed on your **Home** page. You can also look up payments by Project. Navigate to the **Project** and follow the steps below.



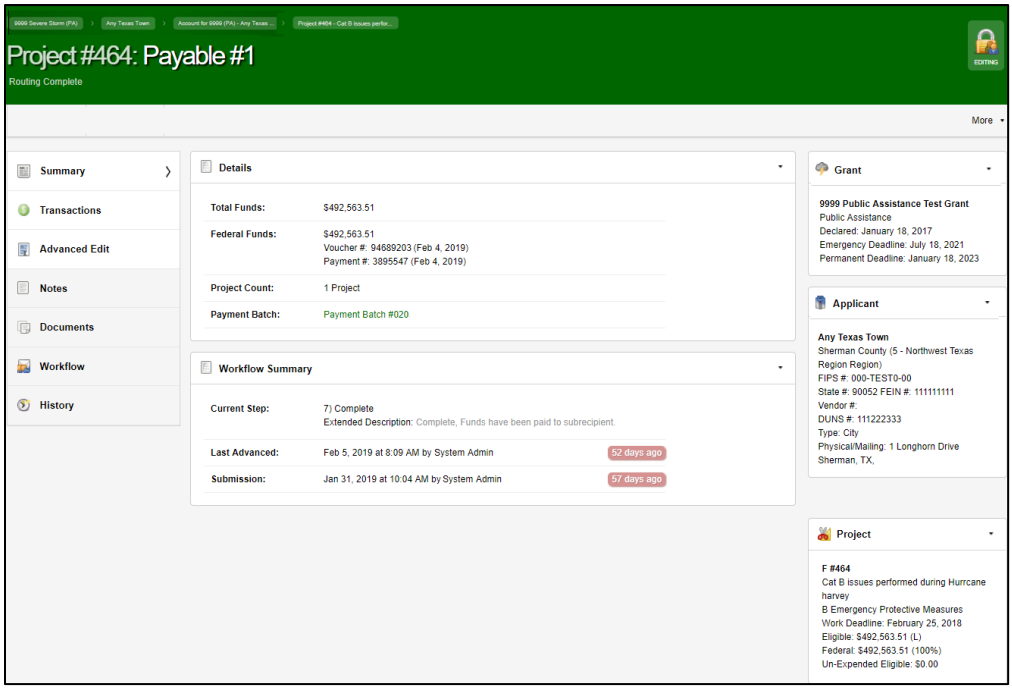
2. Select the ***"Payments"*** tab from the side menu to view a list of all payments for this Applicant.



3. Click on the payment line that you would like to view *(lines are hyperlinked)*, to get more detailed information.

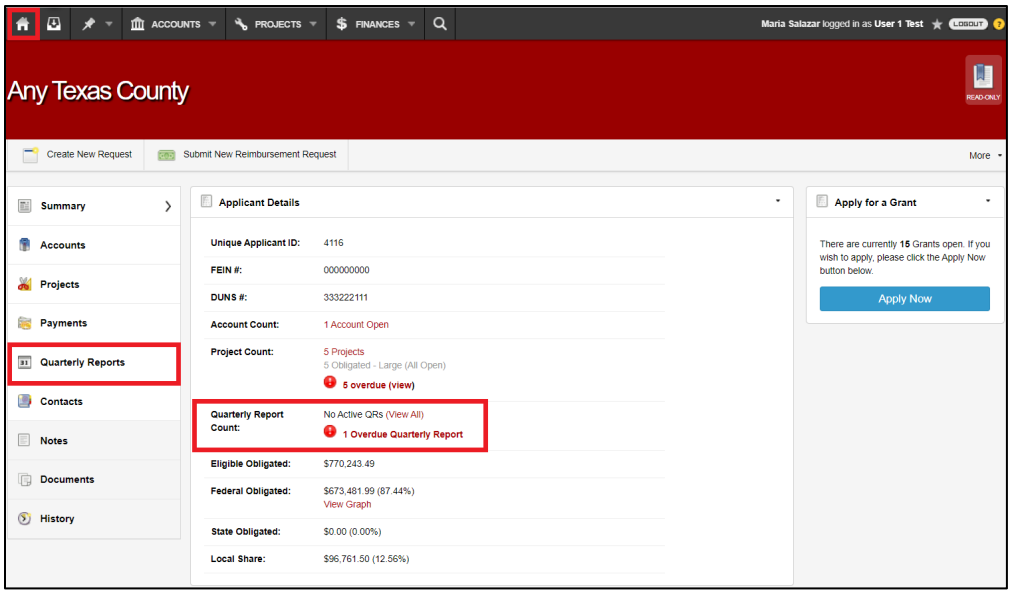


4. A screen will display with payment details. You can also view other details by clicking the tabs on the left.

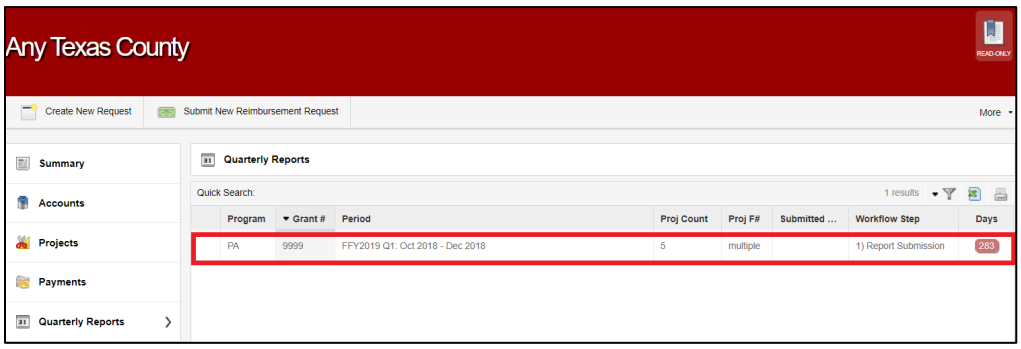


Quarterly Reports

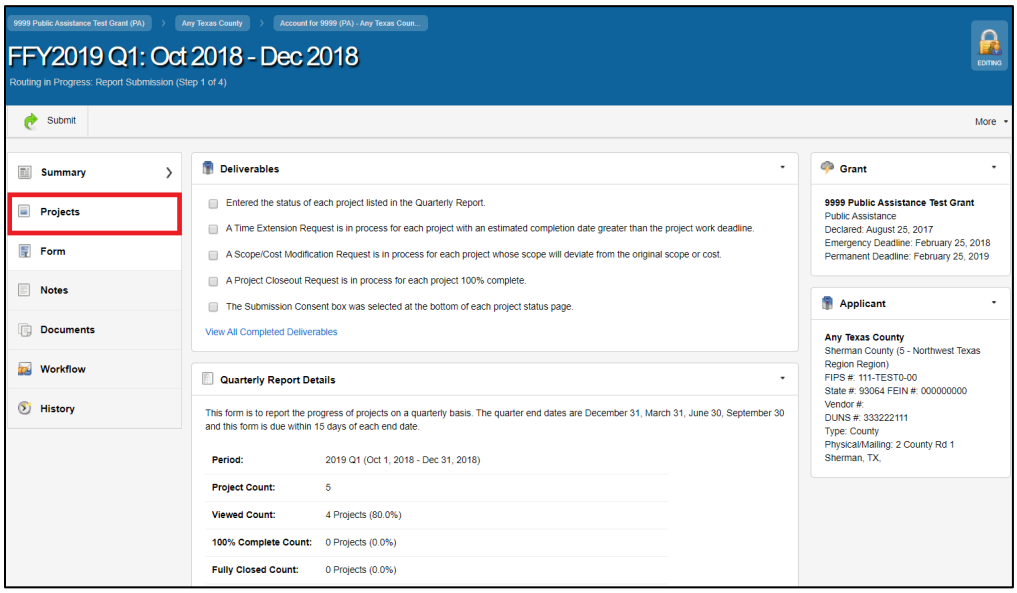
1. Reporting for the Public Assistance (PA) program is required on all large projects on a quarterly basis, and for all Hazard Mitigation Grant Program (HMGP), and Pre-Disaster Mitigation (PDM) projects. From the **Home** screen, select the Quarterly Report(s) that need(s) to be submitted listed under **Quarterly Report Count.** Click on the red text to be navigated, or click on the ***"Quarterly Reports"*** tab on the left side menu.



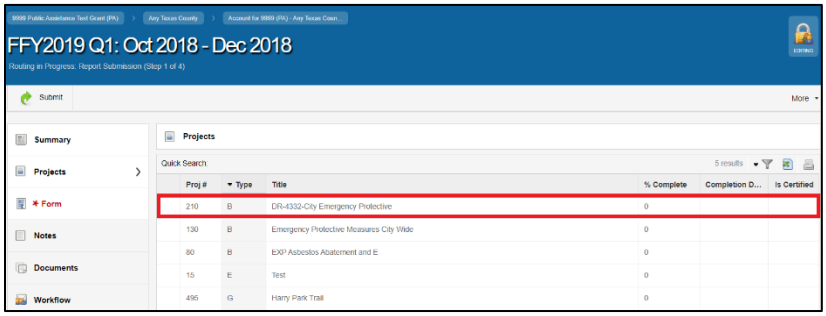
2. Select the **Grant #** and current **Period** (Quarter) that needs to be reported from the displayed list *(lines are hyperlinked)*. You may need to select an older period if you have not yet submitted a prior report. Look for the Workflow Step ***"1) Report Submission."***



3. Click the ***"Projects"*** tab to bring up a list of Projects.

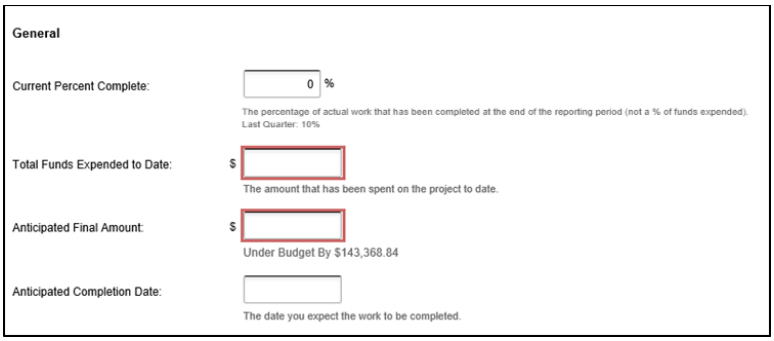


4. A list of projects will display. Select the first ***"Project"*** to begin reporting.

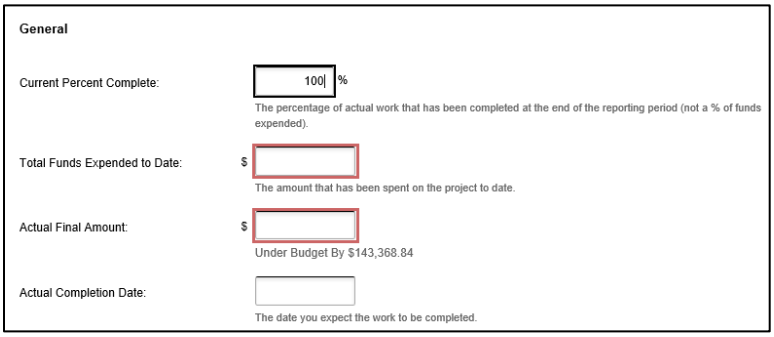


5. The form will display. Complete the form:
   - ***"Current Percent Complete"*** – Percentage of work completed based on the progress made in completing the scope of work at the end of the reporting quarter.
   - ***"Total Funds Expended to Date"*** – Actual eligible expenses that have been expended to date to complete the scope of work on this project.
   - ***"Anticipated Final Amount"*** – Eligible expenses that are anticipated to be expended to complete the scope of work on this project *(only if the project has not been completed).*
   - ***"Anticipated Completion Date"*** – The estimated completion date of the actual work *(only if the project has not been completed).*

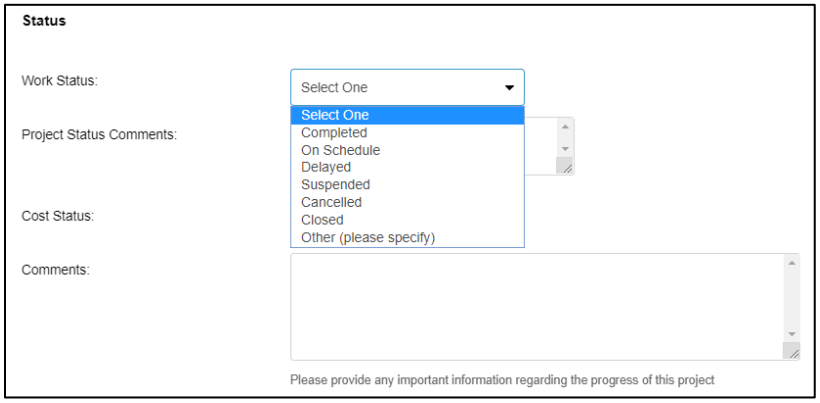
Note: *Amounts reported from previous quarter will be displayed below the field. You will need to update each field for each quarter.*



If 100% is entered for the ***Current Percent Complete****, the last two fields will change from* ***Anticipated Final Amount*** *to* ***Actual Final Amount****, and* ***Anticipated Completion Date*** *to* ***Actual Completion Date****. Enter the information requested.*

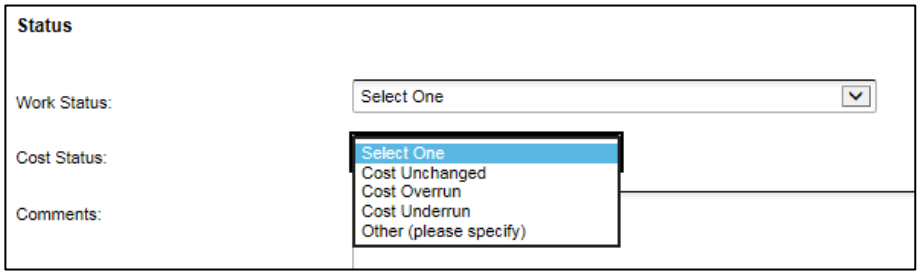


6. Select ***"Work Status"*** from the drop down menu. If ***"Other"*** is selected, a box will be display below to enter an explanation. If ***"Completed"*** or ***"Closed"*** (by FEMA) is selected, the ***"Current Percent Complete"*** must be 100%.

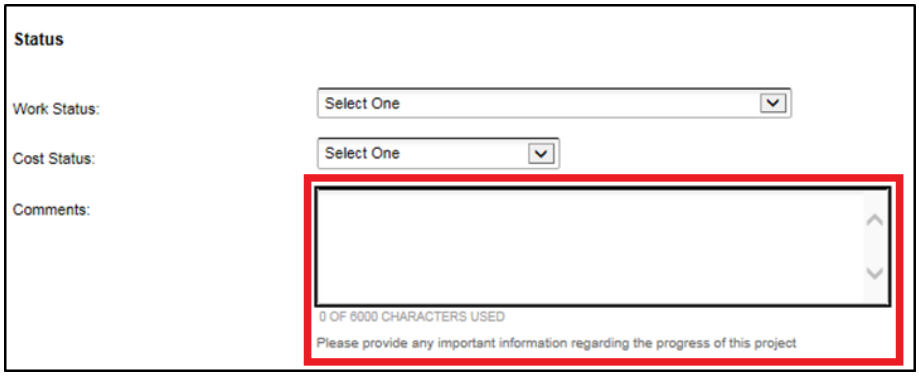


7. Enter ***"Project Status Comments"*** in this box.

8. Select ***"Cost Status"*** from the drop down menu. If ***"Other"*** is selected, a box will be display below to enter an explanation.

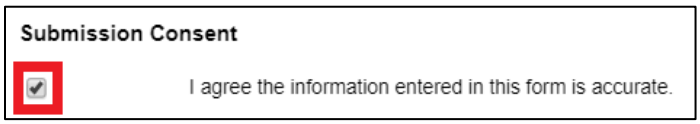


9. Enter ***"Comments."*** Include any pertinent information regarding the progress of this project.

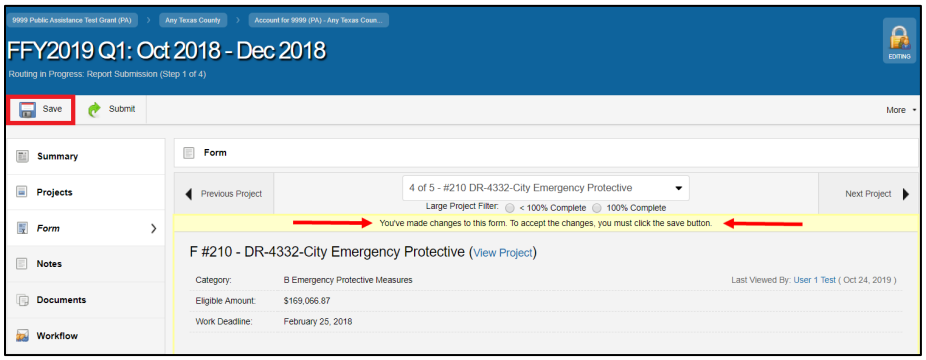


10. After updating all of the information for each project, click on the red box under ***"Submission Consent"*** to confirm that the information entered into the form is accurate. This will insert a check mark in the box.

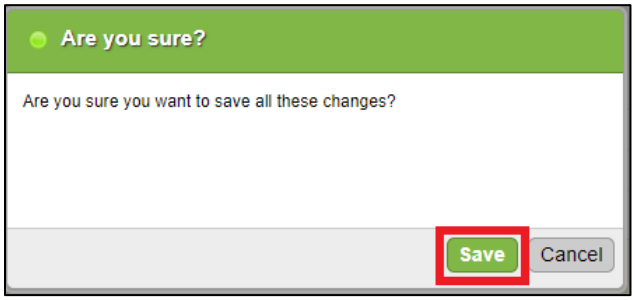
Note: *This box needs to be checked for each project report in order for you to submit the report.*



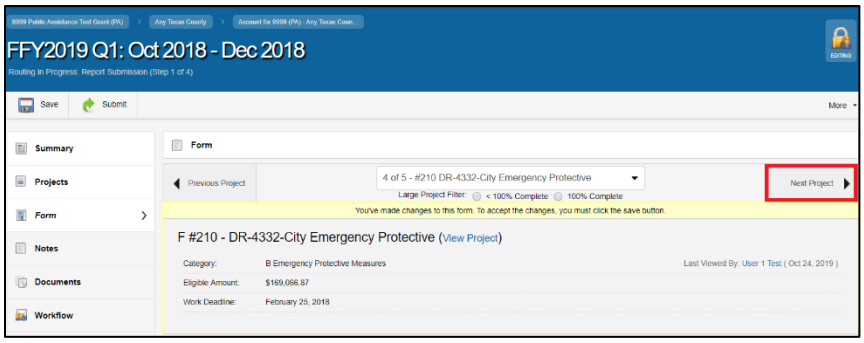
11. Click ***"Save"*** after you have updated each **Project**, and checked off the **Submission Consent**. The system will prompt you to save after each Project *(notice yellow banner)*. If you move on to another project without saving it, you will lose your changes.



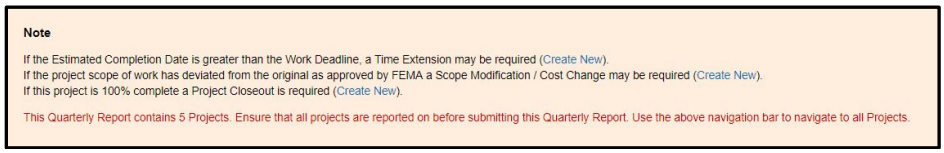
12. A window will display asking you if you are sure that you want to save all of the changes. If you are sure, click ***"Save."***



13. After you have saved the report for the first project, the yellow banner will disappear. If you have multiple projects to report, you can click ***"Next Project."*** Repeat Steps 5 – 12 until you have reported on each Project.



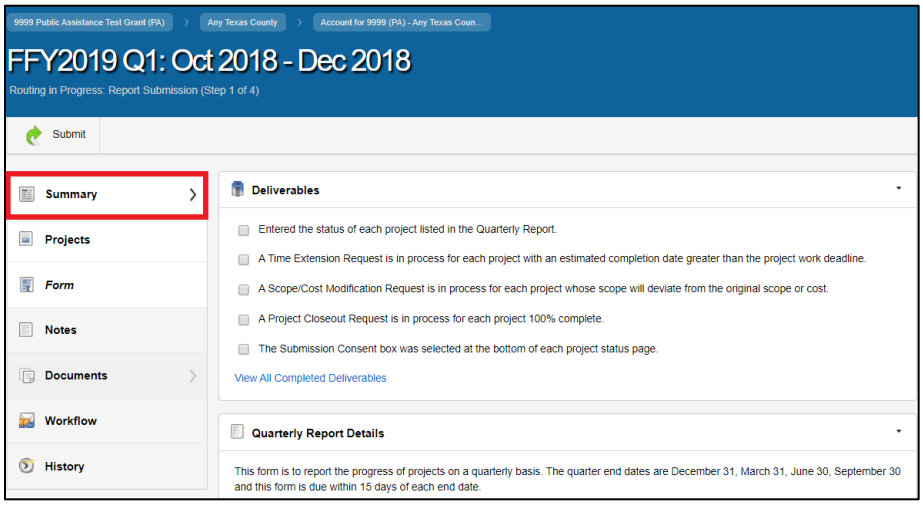
14. New forms can be created from the **Note** section in the report, if needed. To create new forms click on the ***"Create New"*** hyperlinks in blue. You can request a Time Extension, Scope Modification / Cost Change, or Project Closeout from this section.



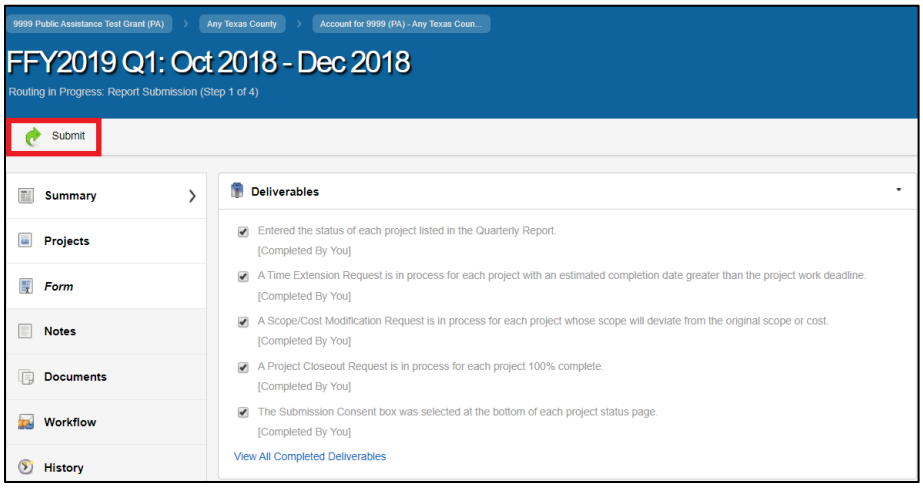
- Time Extension form is required when the estimated Completion Date is after the work deadline.
- Scope Modification / Cost Change form is required when the project scope of work does not match the scope of work in the current FEMA approved project worksheet.
- Project Closeout form is required when the project is 100% complete.

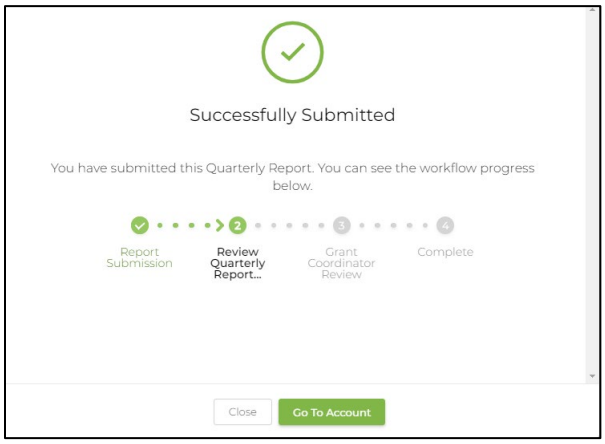
15. After you have saved the form, click the ***"Summary"*** tab on the left side menu to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific deliverable.

Note: Even if the deliverable is not applicable you must check off that it has been completed. *For example: If your project is scheduled to be completed by the work deadline, you must still check off "A Time Extension Request is in process for each project with an estimated completion date greater than the project work deadline," even though you will not be completing a Time Extension Request.*



16. Click the ***"Submit"*** button after all of your **Projects** have been updated, and you have confirmed that you have completed all the **Deliverables**.



17. You may leave a note when this window is displayed. Click the ***"Submit"*** button when done.

18. A notification will display letting you know that the **Quarterly Report** was successfully submitted. You may ***"Close"*** the window or ***"Go to Project."***