

# 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

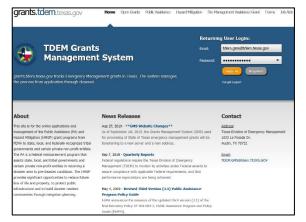
https://grants.tdem.texas.gov tdem.gms@tdem.texas.gov

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# 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

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all aspects of their FEMA Grant Programs.

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

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# **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.

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About	News Releases		Contact
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*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

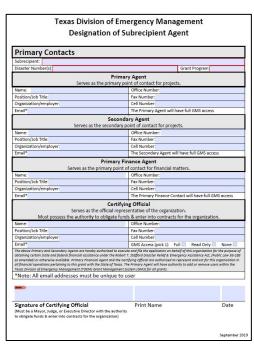
#### How do I Sign Up for the Grants Management System (GMS)?

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1. In order to access GMS you will need to go to <u>https://grants.tdem.texas.gov</u> 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 <u>TDEM.GMS@tdem.texas.gov</u>. If we have a signed DSA on file, we will email the primary contact at your entity to

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	For access to more than one grant program a separate Access Request form should be submitted	
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request permission to grant you access to GMS.

3. The link to the DSA form is:

<u>https://grants.tdem.texas.gov/site/Forms.cfm</u>. 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.

October 2019

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

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

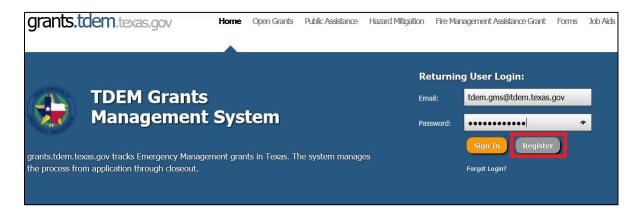
**Note:** All persons on the form must have a unique email address (the same email address cannot be used for multiple people).

- 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 <u>TDEM.GMS@tdem.texas.gov</u>.
- 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 <a href="https://grants.tdem.texas.gov">https://grants.tdem.texas.gov</a>, 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 <u>business/work</u> 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 <u>cannot</u> 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 <u>not</u> 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 <a href="https://grants.tdem.texas.gov/site/Forms.cfm">https://grants.tdem.texas.gov/site/Forms.cfm</a>.
- **Assignment Description:** If the user will be restricted to select projects for HMGP, please list here.

Register for Access	
Name Prefix	
Name Prefix	
First Name:	
Middle Name:	
Last Name:	
Name Suffac	
Title:	
Email	Use your business email
	Use your business email
Phone - Business:	
Is Direct Line:	Not Known
Phone - Fao:	Is the number indicated above a direct line to this contact?
Phone - Celt	Select New User Requesting Access
Request Type:	New User Requesting Access
Please select your user type:	O Lam representing Texas Division of Emergency Management or FEMA.
	I am a representative for an Applicant Organization.     Select Organization
Applicant Organization:	Select Chea  I your specific Applicant Organization does not appear on the list, please select "Oreate New Applicant
	If your spectre registrant ungencation open not appear on the last, preside select "unsee new replicant Organization" and 61 in the required fields.
Requested Permission Level:	Select One
Reason for Requested Access:	Please specify Public
	Assistance, Hazard Mitigation or both (Note: If you need access to both PA &
	HM then this is not necessary if noted in
Grants Program:	Select One Reason for Requested Access above) For access to mon than one grant program a separate Access Targuet form should be submitted
Grant Number.	Colort County
uram Number.	PA 1709 - Server Bitzma, Tornadosa, and Fixeding (Decland Jan 28, 2007) 1704 - Humane Boly (Decland Jan 24, 2008) 1707 - Humane Rev (Decland Jan 24, 2008) 1701 - Humane Arev (Decland Jan 24, 20
Position:	Select the type of one version of the select the type of one version of the select the type of the typ
Assignment Description:	
And general consequence	<u></u>
	If you don't work this user assigned to all Clerits & Projects for the given organization, specify the ones which they should be restricted to.
	Regster Gandel

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

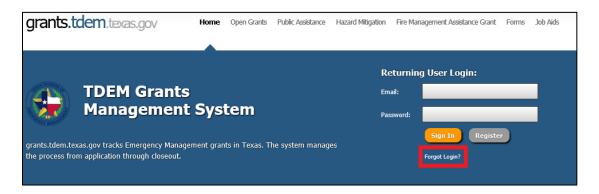
completed and signed by the Certifying Official for your organization. *The Certifying Official must be a Mayor, Judge, or Executive Director with the authority to obligate funds and enter into contracts for the organization.* The signed and completed form should be emailed to <u>TDEM.GMS@tdem.texas.gov</u>. 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 <u>https://grants.tdem.texas.gov/site/Forms.cfm</u>. 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.

grants.tdem.texas.go	1/V Home Open Garits Public Resistance Hazard Mitigation Fire Management Resistance Grant Forms Job Add
orms	
Open Grants	Public Assistance (PA) Forms
Public Assistance	Request for Public Assistance (RPA)
Hazard Mitigation	PA Alternate and Improved Projects NEPA Minimum Information Form
Fire Management Assistance	Critical Private Non-Profit Facility Questionnaire (when applicable)
Grant	Obtain and Maintain Insurance Purchase Commitment (when applicable)     Duplication of Benefits
Forms	TDEM 25 - Public Property Site Assessment
Job Alds	Applicant's Agent Check List for Attachments
News Archive	Notification of Request for Withdrawal
	Hazard Mitigation (HM) Forms
	Hiszard Mitigation Notice of Intent Form
	Application Package HM
	Application Form HM     Application for Rederal Assistance SF 424
	Application for Peteral Additance SP 121     Budget Worksheet Instructions
	Budget Worksheet
	Certifications Lobbying - FEMA Form
	Construction Assurances SF 424D     Disclosure of Lobbying Activities - FEMA Form
	Environmental and Historical Preservation Checklist
	FEMA BCA Instructions to Install
	Non-Construction Assurances SF 12/18     Property Site Inventory Worksheet
	Acquisition Application Package HM
	Acquisition Demolition Project Application     Certifications Reparding Lobbying FEMA Form 112-0-3C
	<ul> <li>Construction Programs Standard Form 424D V1.1</li> </ul>
	<ul> <li>Declaration and Release Form</li> </ul>
	Disclosure of Labbying Activities FEMA Form     Duplicate of Benefits Ventication Spreadsheet
	<ul> <li>FEMA Model Deed Restrictions</li> </ul>
	<ul> <li>Model Statement of Assurances for Property Acquisition Projects</li> </ul>
	Notice of Voluntary Interest Sample 1
	Notice of Voluntary Interest Sample 2     PSI Spreadsheet - Alternate Properties
	<ul> <li>PSI Spreadsheet - Primary Properties</li> </ul>
	Voluntary Participation Statement
	Fire Management Assistance Grant (FMAG) Forms
	Request for Fire Management Assistance Subgrant Form
	Common Forms     Designation of Subrecisient Agent
	<ul> <li>Direct Deposit Patroneologi Form</li> </ul>
	Payment of Funds Request     Employee Benefit Calculation
	Employee Benefit Calculation     Applicant's Claim Summary
	Contract Work Summary Record
	Force Account Labor Summary Record
	Force Account Equipment Summary Record     Force Account Materials Summary Record
	Force Account Pacenas Saminary Record     Force Account Rented Equipment Summary Record
	<ul> <li>GMS Access Authorization</li> </ul>
	Quarterly Project Review     Subministed Control Control Control
	Subrecipient Closeout Cartification Form     Ste Inspection Report Form
	<ul> <li>Applicant Record Keeping - Forms and Instructions</li> </ul>
	Grant Terms and Conditions
	Notification of Request for Withdrawal - PA     Ste Insection Package
	<ul> <li>and anaphaben (PRAD)</li> </ul>

4. The system administrators will set up the new user account, and a system generated email from <u>grants.tdem.texas.gov</u> 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.



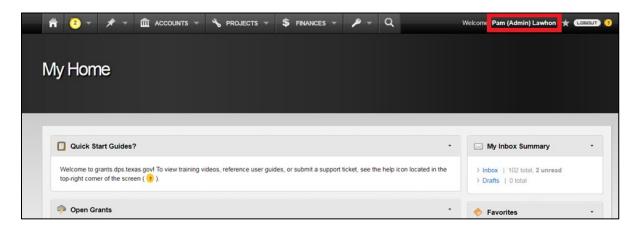
2. Type your email address in the red box, and click the blue *"Send Information"* button.

g	rants.tdem.texas.gov	Home	Open Grants	Public Assistance	Hazard Mitigation	Fire Management Assistance Grant	Forms	Job Aids
R	etrieve Account I	nformatio	on					
0	Open Grants							
		Retrieve Accou	nt Informa	tion				
0	Public Assistance	Forgotten your Passw	ord or Usernam	e? Enter your email a	ddress in the form b	elow and your login details will be ema	ailed to you	ı. Please
0	Hazard Mitigation	note, this action will r	eset your passw	ord.				
0	Fire Management Assistance Grant	Email Address:						
0	Forms							
0	Job Aids			Send Informatio				
0	News Archive							

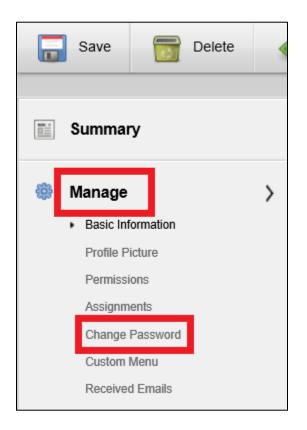
3. You will receive an email from <u>no-reply@emgrantspro.com</u> containing a link to reset your password.

#### **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."



 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.

Change Password	d Back	to Contact Admin	
Summary		Manage	1
🌼 Manage	>		
Basic Information		Old Password:	
Profile Picture			Please enter your old password
Permissions		New Password:	←
Assignments			Password must be at least 8 characters.
<ul> <li>Change Password</li> </ul>			Your password must have at least one character in 3 of these categories: Uppercase, Lowercase, Numbers and
Custom Menu			Special Characters.
Received Emails			
🚱 Inbox		Confirm New Password:	Please confirm your password

#### **User Profile / Update Contact Information**

lser 5 Test		
Sent Sent		
Sunnary	Manage Basic Information	
· Sealt information	Namo Profec	Liber 5
Change Password Castore News	Vidde Name:	
Received Ermile	Last Name:	Test
	Name Suffic	100.
	Tite:	Test User
Notes	Organization:	Any Town
Documenta		
History	Ernet	Used@jool.com
	Phone - Bueinese:	205-005-0005
	In Direct Line:	Not Kitzun   Ist be number indiced above a direct les to this contact?
	Phone - Fax:	
	Phone - Call:	
	Phone - Home:	
	Phone - Pager:	
	Pariannel Nantain	
	Saparvisor:	Type to Staarch
	Location:	
	Name	
	Address:	
	City:	
	States	TX - Tosan 🔹
	Zip Code:	
	User Into:	
		Userf@eclam The user's enail eldness is their userverse
		(Charge)
	In Out Of Office:	No •
	Preferences	
		No  Turning this Growill him the generic means that appear in the Inexcler
	Email Notifications Enabled:	Yea •

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."* 

ny Texas Town	PROJECTS * \$ FINANCES * Q Menu Bar	Maria Salazar logged in as User 2 Test ★ (LOUGUR) REDOC
Create New Request 500 Submit Net	v Reimbursement Request	More
Summary	oplicant Details	- E Apply for a Grant
Accounts Unit	ue Applicant ID: 2501	There are currently 11 Grants open. If you wish to apply, please click the Apply Now
FEII Projects	l#: 11111111	button below.
DUM	S#: 111222333	Apply Now
Payments Acc	Dunt Count: 2 Accounts Open	
Quarterly Reports	ect Count: 8 Projects 6 Unobligated 2 Obligated - Large (All Open)	
Contacts Qua	nterly Report No Active QRs (View All) nt: I Overdue Quarterly Report	
Notes	ble Obligated: \$377,781.90	
Documents Fed	eral Obligated: \$990,781.78 (262.26%) View Graph	
History Stat	e Obligated: \$24,192.84 (6.40%) View Graph	
loc	al Share: \$36,289.27 (-168.66%)	

- **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.

interfection of the second sec	inances - Q	, Maria S	alazar logged in as User 3 Tes	it 🔽 🛧 (	LOGOUT 🢡
Choose an Applicant					
Save as Menu Preset					
Quick Search:			2 resu	ts 🔹 🍸	2
▼ Name	FIPS #	Classification	County	PNP	Agency
Any Texas County	111-TEST0-00	County	Sherman	Ν	N
Any Texas Town	000-TEST0-00	City	Sherman	Ν	Ν

#### Menu Bar

🚔 🗳 🖈 🕆 🏦 ACCOUNTS 🕆 🔧 PROJECTS 🔻 💲 FINANCES 👻 📿

Maria Salazar logged in as User 2 Test 🔺 💷 🕫

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

#### **My Inbox**

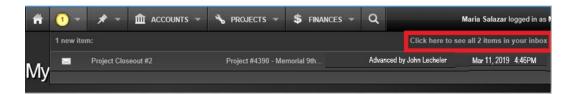
From your **Home** screen your **My Inbox** will be located at the top of your screen in the Menu Bar.



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.



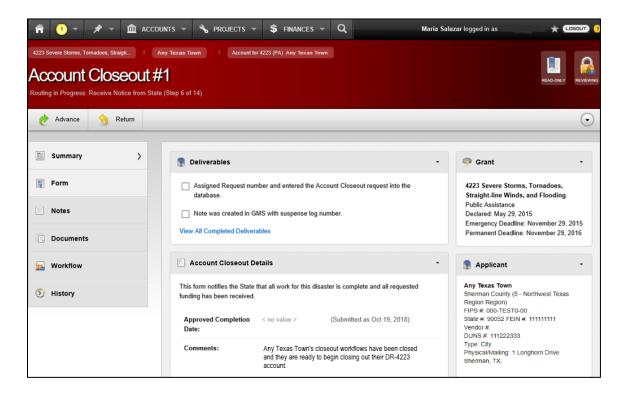
To see all the items in your **Inbox** click on the area highlighted in red below *"Click here to see all 2 items in your inbox."* This number will change depending on the number of items in your **Inbox**.



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

My Inbox								
Dismiss Selected	>	😤 M;	y Inbo	x				
My Inbox     Dealt With		Quick	Search	:			2 results 🔹 🍸	8
Delayed				▲ Date	Action	From	Item	Days
Reminders			8	Mar 11, 2019 4:46 pm	Advanced to 11)	John Lecheler	Project Closeout #2 - 1791 (PA) / Any Texas To	1
🔏 Drafts			8	Mar 11, 2019 3:34 pm	Advanced to 6)	John Lecheler	Account Closeout #1 - 4223 (PA) / Any Texas To	2

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.

Ħ	🖸 🖈 🔻		INTS 👻	s PROJECTS 🔻	\$ FINANCES -	۹		Maria Salazar logged in as User 1 Test  🛔	
My	/ Inbox								
*	Dismiss Selected								
-	My Inbox	>	😵 My	y Inbox					
	<ul> <li>My Inbox</li> <li>Dealt With</li> </ul>		Quick Se	arch:				0 results 👻 🍸	7 🔊 🖴
	Delayed			▲ Date	Action	From	Item		Days
	Notes Reminders						No Results		
&	Shared Inbox								
*	Drafts								
ľ,	Sent Items								
9	Support Tickets								

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

My Inbox					
發 My Inbox		💥 Drafts			
🔒 Shared Inbox		Quick Search:	8	results 👻	8
		Created Date	Item	Re-Assigned	Days
🔏 Drafts	>	Mar 25, 2019 3:29 pm	Appeal - 9999 (PA) / Any Texas Town		0
Sent Items		Jan 9, 2019 11:03 am	Project Closeout - 9999 (PA) / Any Texas Town / Project #74 - EXP Asbestos Abatement and E (L, Cat B)		75
		Dec 18, 2018 1:13 pm	Project Closeout - 9999 (PA) / Any Texas Town / Project #74 - EXP Asbestos Abatement and E (L, Cat B)		97

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.

No Uploaded Documents	Add Document

#### **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*).

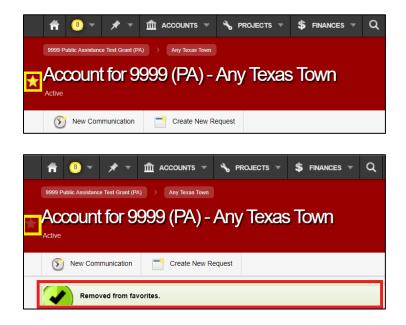
🛱 🌀 🕆 🖈 🕆 🏛 ACC	ounts = 🔧 projects = 💲 finances = Q	laria Sa	lazar logged in as User 4 Test 🔺	LOSOUT ?				
Image: Second text     Weight Second								
New Communication	create New Request			More •				
Summary >	C Account Details	·	🧇 Grant	•				
🕌 Projects	Authorized Agent: Joe Applicant - Emergency Manager		9999 Public Assistance Test O Public Assistance	Grant				

	ñ	6 -	* -	血	CCOUNTS 👻		FINANCES T	۹	Maria S	ialaz	ar logged in as User 4 Test 🔺	
*	Image: State Content (M)     Image: State Content (M)     Image: State Content (M)       Account for 9999 (PA) - Any Texas Town     Image: State Content (M)       Active     Active											
	8	New Co	mmunication		Create New R	equest						More •
		Add	ed to favorit	tes.								
		Summa	y	>	E Acco	ount Details					🧇 Grant	•
	*	Projects		>	Author	ized Agent: J	oe Applicant - Emergency I	/lanage			9999 Public Assistance Test Public Assistance	Grant

- **Delete Favorites:** There are two ways you can delete favorites:
  - 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 8 will appear. Click on the red 8 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).

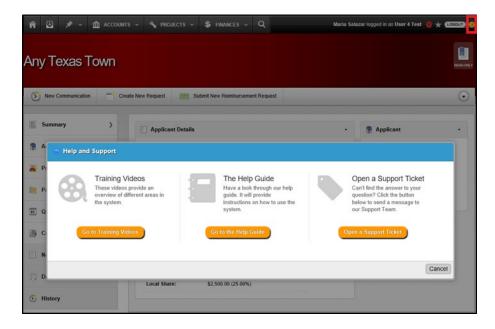
📅 🧕 🔻 🖈 🕆 🏛 accounts 🕆 🔧 projects 🔻 💲 finances 👻 Q	Maria Salazar logged in as User 4 Test 🔺 💷 🕫 🤊
	My Favorites Accounts Account for 9999 (PA) - Any Texas Tow.
★ Account for 9999 (PA) - Any Texas Town Active	ACCOUNT OF 3533 (LVV) - VAU HOUSE VAN-
New Communication	More •
• Are you sure? Do you want to remove this favorite? (Account for 9999 (PA) - Any Texas Town - 9999 (PA) / Any Texas Town)	Accounts     Accounts     Accounts     Accounts     Account for 99999 (PA) - Any Texas Town Active     Active     Account for Page (PA)     Create New Request
Remove	Removed from favorites.

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

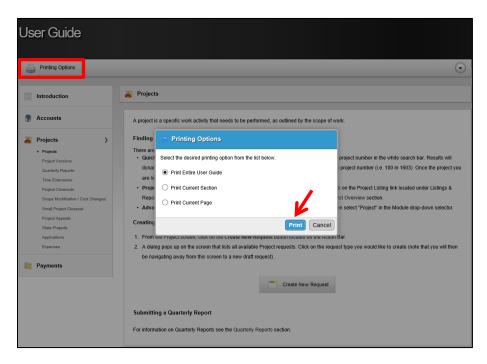
The **Help** button is a question mark **?** located on the far right corner of the Menu Bar. Clicking on the **Help** button gives you the option to view **Training Videos**, access the **Help Guide**, or **Open a Support Ticket**.



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

User Guide	
Printing Options	More •
Introduction	Projects
Accounts	A project is a specific work activity that needs to be performed, as outlined by the scope of work.
Projects >> Project Varians Custery Roots Time Educations Project Osseaut Project Osseaut Project Appeals Applications Expenses	Finding 3 Project There are a few ways to the projects in the system: Outs Starting Click on the Project menu located on the Main Menu Bar, then enter the project number in the white search bar. Results will dynamically show as you type (i.e. 100). You may also specify the Grant number after the project number (i.e. 100 in 1603). Once the project you are looking for appears, click on it to go directly to that project. Project List Report: Click on the Projects menu located on the Main Menu Bar, then enter the project Justing ink located under Listings & Reports. For more information on using quick search and the projects need to be Main Menu Bar, then select "Project" in the Module dtop-down selector. Creating a New Project Request 1. From the Project Streen, click on the Create New Request builton located on the Action Bar. 2. A distop tops up on this screen that lists all available Project requests. Click on the request hype you would like to create (note that you will then be navigating away from this screen to a new draft request).
😽 Payments	Create New Request
	Submitting a Quarterly Report
	For information on Quarterly Reports see the Quarterly Reports section.

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.

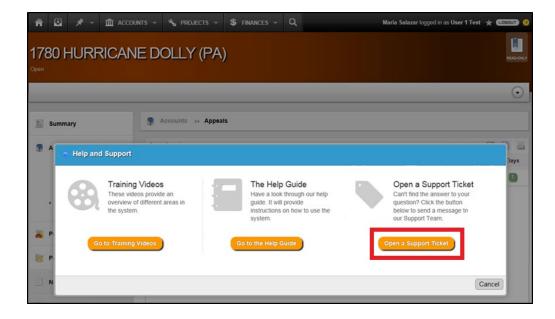
**Note:** It is important to click the **Help** icon from the page that you need help, as the system records the URL of the current page for analysis purposes.

#### 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*)

👚 🖾 🖈 - 🏛 i	ACCOUN	TS 👻	🔏 PROJECTS 👻	\$ FINANCES -	Q		Maria Salazar lo	gged in as User 1 Test 🔺	LOSOUT 2
	ANE	ΞD	OLLY (PA)	)					READ-ONLY
Summary			Accounts IN Appeal	5					$\odot$
Accounts	>	Quick	k Search:					1 results 🔹 🍸	88
Accounts			<ul> <li>Applicant Name</li> </ul>	County	PN	P Agency	Justification	Workflow Step	Days
Requests for Assistance Account Activation			Any Texas Town	Sherman	N	N	Because we don't a	2) Review Appeal Req	1

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.

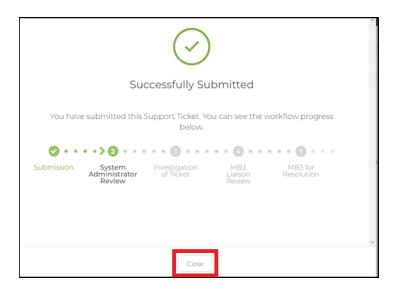
#### **Support Ticket Form**

Create	New Si	nbbo	rt Ticket				
Form f	e Submit	>	Cancel  Form  Type:  Priority: Title:  Reference Page: System Area: Description:	a b c d e	nal Access pdate Request n  Low title describing the re cas.gov/app/#2934	eason for this support ticket. (Example: Unable to ?t=form	o open attachment.)
Notes & Comm	ents		There are currently no Be the first to add		Add Note	No Uploaded Documents	B Add Document Add Issues

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

Submit this S	Support Ticket
Before Submitting t	his Support Ticket please fill out the necessary information below.
	Leave a note:
	0
	v
Cancel	Submit

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



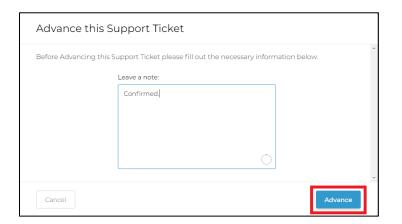
6. The Support Ticket will go into a queue. A System Administrator will process your request, and advance the support ticket to Step 6 for you to confirm that the Support Ticket was resolved. A notification will be sent to your Inbox. Click on the line that contains the Support Ticket. If you do not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

My Inbox								
Dismiss Selected           Image: Wy Inbox	>	*	My In	box				
<ul> <li>My Inbox</li> <li>Dealt With</li> </ul>		Quick	Search	h:			5 results 👻 🝸	2 8
Delayed				▲ Date	Action	From	Item	Days
Notes Reminders			8	Jan 29, 2019 9:54 am	Advanced to 6)	Maria Salazar	Support Ticket - Help	0
Shared inhor			8	Jan 15, 2019 2:28 pm	Advanced to 2)	John Lecheler	Time Extension #5 - 9999 (PA) / Any Texas Town / Project #900 - Pct 2 and 3 - Road Dama	14

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

Support Ticket - H Routing in Progress: User Verification (Step		
👌 Advance 🥱 Return	Set on Hold	Deny 📷 Dekte < Support Ticket Admin
Summary >	Support Ticket Sur	mmsry
Form	Creator:	User 4 Test (External) Support Affiliate User4@aol.com
Notes	Ticket Number:	555-555-5555 346990
Documents	Name:	Help
Workflow	URL:	#1329?
③ History	Description:	Help
	Туре:	Help Request
	Priority:	Normal
	Workflow Summar	у
	Current Step:	6) User Verification Extended Description: Send note to user with resolution details and request for verification the issue was resolved.

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



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



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.

Before Returning this Support Ticket pleas	se fill out the necessary information below.
Returning To Step:	Leave a note:
2) System Administrator Review	•
Provide a Reason:	
Additional Information Requested	
Approved in Error	
Correction Required	
O Documentation Requested	

#### **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) **Y** 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.

Projects			
Save as Menu Preset			
Quick Search: Apply Filters Reset Cancel			7 results 🛛 🍸 🗃 🚔
Grant / Applicant	Project	General	Custom
Program	🔲 туре	On Hold	Project Version Status
2 Grant	Size	Deleted	Has Closeout Request
Open 4029 (PA) Wildfires	Obligated		Has Small Project Closeout
9999 (PA) Public Assistance Test Grant	- Show More Filters		Show More Filters
County			
Show More Filters			

- 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)

Search	_										7 results	78
Frogram	Grant #	Applicant Name	Proj F#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status
PA	9999	Any Texas Town	900	Pct 2 and 3 - Road Damage	с	ι,	\$241,928.44	75%	0%	0%	0%	Closeout in Prop
PA	9999	Any Texas Town	74	EXP Asbestos Abatement	в	Ĺ.	\$135,853.46	100%	0%	0%	n/a	Closeout in Pro
PA	9999	Any Texas Town	205	DR-4332-City Emergency	в	L	\$0.00	0%	0%	0%	1/2	Pending Obligat
PA	9999	Any Texas Town	126	Emergency Protective Mea	в	ι.	\$0.00	0%	0%	0%	1/8	Pending Obligat
PA	9999	Any Texas Town	75	EXP Asbestos Abatement	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligat
PA	9999	Any Texas Town	490	Harry Park Trail	G	L	\$0.00	0%	0%	0%	n'a	Pending Obliga
	9999	Any Texas Town	11	Test	E	E.	\$0.00	0%	0%	0%	1/2	Pending Obliga

#### **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.

Javes	is Menu Pres	et		
Quick Search:	Type he	e	5 results	• 🍸 🗃
• Program	Grant #	Grant Name	Declared Date C	losed Date
HMGP	9999	Test Grant	Jul 12, 2016	
PA	1791	Humicane like	Sep 13, 2008	
PA	1709	Severe Storms, Tornadoes, and Flooding	Jun 29, 2007	
PA	1780	Hurricane Dolly	Jul 24, 2008	
PA	99999	Public Assistance Test Grant	Jan 18, 2017	

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

Grants	;						
Save a	s Menu Preset	New Grant					
Quick Search:	Hurricane Harvey					2 results	• 7 🗃 📇
• Program	Grant #	Grant Name	Declared Date	Closed Date	Eligible Obligated	Applicants	Projects
HMGP	4332	Texas Hurricane Harvey	Aug 25, 2017		\$0.00	1	0
PA	4332	Texas Hurricane Harvey	Aug 25, 2017		\$671,105,489.97	1261	266

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

	Hurricane Harv		
Summary	> 🗐 Grant Detai	is ·	
Accounts	Name:	4332 Texas Hurricane Harvey	
	Program:	Public Assistance	
Projects Payments	Description:	8/25/17 Initial Declaration Individual Assistance (Assistance to individuals and households) Bee. Goliad, + Show More	
- aymenta	Disaster Type:	Hurricane	
Notes	Liquidation Da	te: Nov 23, 2021 The default is 90 days after Grant POP End Date which is Aug 25, 2021	
Documents	Size Threshold	d: \$123,100.00	
History	Process Ch	recklist -	
		ugust 25, 2017 Iod: August 23, 2017 - September 15, 2017	
	Application of Applicatication of Application of Application of Application of Ap	ue date: February 4, 2018	
	Permanenty	work Deadline. Pedroary 25, 2019	

#### **Print a List**

Every list in the system can be printed.

1. Click on the **Printer** icon and 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.

Save as Menu Prose	a											
Jurck Search:											7 results	• 🛛 🖲 🗧
There is 1 active filter ( Gr • Program	Grant #	Applicant Name	Proi FA	Project Title	Proj	Size	Elicible Amt	F N	Expended %	Fede	State	Status
PA	.5999	Any Texas Town					14	75%	0%	0%	0%	Closecut in Prog
PA	9999	Any Texas Town	Pages				16	100%	0%	0%	nia	Closecut in Prog.
PA	5999	Any Texas Town	Current     Al Page				- 11	0%	0%	(7%)		Pending Obligate
PA	9999	Any Texas Town						0%	0%	0%	n/a	Pending Obligatio
BA	5999	Any Texas Town				rint	Cancel	0%	0%	0%		Pending Obligatio
PA	9999	Any Texas Town		1.541 y 1.605 1.166		-		0%	0%	0%	nia	Pending Obligatio
194	9999	Any Texas Town	11	Test	E		\$0.00	0%	0%	0%		Pending Obligatio

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

🔊 3214226.pdf	^
---------------	---

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.

Program	#	Applicant Name	Proj F#	Proj S#	Project Title	Project Type	Size	Eligible Amt	F %	Expended %	Federal Paid	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	В	L	\$135,853.46	100%	0%	0%	n/a	Open
PA	9999	Any Texas Town	205		DR-4332-City Emergency Protective	В	L	\$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	126		Emergency Protective Measures City Wide	В	L	\$0.00	0%	0%	n/a	n/a	Pending Obligation
PA	9999	Any Texas Town	75		EXP Asbestos Abatement and E	В	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	В	L	\$169,066.87	100%	0%	0%	n/a	Open
PA	9999	Any Texas County	130		Emergency Protective Measures City Wide	В	L	\$130,461.93	90%	0%	0%	n/a	Open
PA	9999	Any Texas County	80		EXP Asbestos Abatement and E	В	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					

#### **Export Lists to Excel**

Every list in the system can be exported to Excel.

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.

Save as Menu Preset			3 Excel Expo	3 Excel Export Settings									
Quick Search:		Pages: Current Page All Pages	Columns: Standard Custom	Standard						3 results	• 7 🗃		
	Program	Grant #	Choose Columns:								Proj Count	Closed Date	
	HMGP	9999	M Grant #			Large Projects Open Large Projects		Mailing City Mailing State		Eligible Amount Expended %	1		
	PA	9999	PI Grant is Close Applicant Nam			Closed Large Projects Small Projects		Mailing Zip Code Primary Contact Prefix		Federal Paid Percent Federal Obligated	5		
	PA	9999	Is PNP       Is State Agence       FIPS #       State Applicant			Open Small Projects Closed Small Projects Closed Date On Hold		Primary Contact Last Name COG Region UA Region		Federal Pald Federal In Process Federal Un-Pald Admin Obligated	7		
			County  Account Status  Program  Classification			DUNS Number Address Line 1 Address Line 2 City		Document Suffix		Admin Paid Admin Un-Paid Is Overpaid (Federal) Primary State Contact			
			PNP     Agency     Proj Count			State Zip Code Mailing Line 1		All Damage Reported FEIN #		Unallocated Advance Balance FAMIS Encumbrance #			
			Open Projects			Mailing Line 2		District Number					

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.

	م															
F	ile	Home Insert Page Layou	t Formulas D	ata Review	View	Develop	er Acrobat	Q	? Tell me w	hat you want	to do					ľ
	<del>ک</del> ۲		- 11 - A A	= = 🔊	• 🗗	/rap Text	Genera	1	÷			Normal	Bad G	n boc	Neutral	
Pa	ste	opy * ormat Painter B I U *	- <u>0</u> - <u>A</u> -	= = =		1erge & Cer	nter • \$ •	ж,	€.0 .00 0.€ 00.			Check Cell	Explanatory In	put L	inked Cell.	
	Clipb		nt G		Alignment		- 15 I	lumbe	er G		* Table *		Styles			
A	A1 • : × ✓ ∱ Grant#															
	А	В	с	D	E	F	G	н	1	J	к	L	м	N		
1	Grant #	Grant Name	Applicant Name	FIPS #	County	Program	Classification	PNP	Agency	Proj Count	Open Proje	cts Large Projects	Open Large Proje	ts Closed Large	Projects	Small
2	9999	Mitigation Plan Tracking	Any Texas Town	000-TEST0-00	Sherman	HMGP	City	N	N	1	0	1	0	0	1	0
3	9999	Public Assistance Test Grant	Any Texas County	111-TEST0-00	Sherman	PA	County	N	N	5	5	5	5	0		0
4	9999	Public Assistance Test Grant	Any Texas Town	000-TEST0-00	Sherman	PA	City	N	N	7	2	7	2	0	1	0

#### **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**.

9999 Public Assistance Test Grant	t (PA) Any Texas Te	own > Accour	nt for 9999 (PA) - Any Texas Town
Project #11 -	- Test (L, C	Cat E)	Breadcrumb
Pending Obligation	Header	•	

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.

9999 Public Assistance Test Grant (PA)	Any Texas Town Account for 9999 (PA) - Any Texas Town
Ducie et 1144 Trati	
Project #11 - Test	
Pending Obligation	Payments
	Quarterly Reports
Create New Request	Contacts
Create New Request	Notes
	Documents
	History
Summary >	Project Details

## **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:

 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.

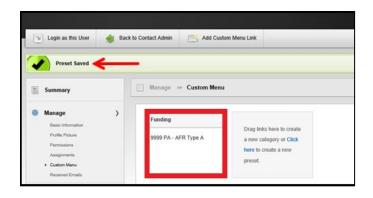
Summary	Manage ++ Custom Mer	nu		
Manage Basic Information Profile Picture Change Password • Custom Manu	> Drag Built in Inits here to create a new category of Dick here p create a new prest	Modify Pre	set: null Choose an Ooton	_
Received Emails		Listing	Account Account Activation	^
Inbox			Account Closeout Account Contact Advance of Funds Request	ave Preset Cancel
Drafts	Built-in Presets		Appeal Applicant Applicant Risk Ranking	
	Click the "+" below to add these	preset menu options to your	Application Communication	he filter options even further.
Notes	Project	Financial	Contact Expense Expense Project Cost	
Documents			Financial System Import Grant Inbox	100
History	Projects Overpaid     Region 1     Region 2     Region 3	+ Payment Listing     + RFR DDA Approva     - Support Ticket Pen     Resolution	Inbox - Dealt With Inbox - Delayed Inbox - Orafts Inbox - Item Tracker Inbox - Sent Inbox - Shared	nce
	Region 4     State Agencies		Investment Justification Issue Meeting By Project Package Payable Payment Payment Payment Batch	e vout

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.

Basic Information		Other Information		
Preset Name:	9999 PA - AFR Type A	Category: + Add I	New Category	
	his will be the name of the link in your menu.	New Category Name: Funding	9	
Listing:	Advance of Funds Request	Results Per Page: 25	V	
Filter Options:				
Grant / Applicant	Project	General	Custom	
Program	🗹 Туре	Step	Amount	
Grant	Hazard Mitigation Grant Prog Public Information (I) - Initiativ Planning Other (P) - Planning-	Submitted Date	Type	
Open 1999 (PA) Wildfires 4029 (PA) Wildfires	Public Assistance A - Debris Removal	Is In My Queue(s)		
9999 (PA) Public Assist	B - Emergency Protective Mei C - Roads and Bridges D - Water Control Facilities	Show More Filters		
County	Size			

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

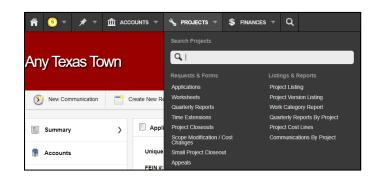


2. Presets can also be created by dragging a built in preset from the **"Built-in Presets"** section below to the preset area (*red square shown below*). If you click on the plus signs next to the built-in presets, it will display a window to further customize the **Built-in Preset**.

Manage 🗰 Custom Me			
Drag Built-in links here to create a new category or Click here to create a new preset. Built-in Presets	]		
Click the "+" below to add thes	e preset menu options to your custom mer	nu above, you can customize the	filter options even further.
Product	Project Closeout	In Process Listings	Assignments
Project			

#### 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.

Projects												
📑 Save as Menu Prese	-											
Julick Search:											7 rosuits	• Y 🖲 🗃
- Program	Grant #	Applicant Name	Proj F#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status
PA	9999	Any Texas Tourn	900	Pct 2 and 3 - Road Darrage	с	L	\$241,928,44	75%	0%	0%	0%	Closeout in Prog.
RA	9999	Any Texas Torum	74	EXP Asbestos Abelement	В	L	\$135,853.46	100%	0%	0%	nia	Closeout in Prog.
PA.	9999	Any Texas Town	205	DR 4332 City Emergency	D	L	\$0.00	0%	0%	0%	112	Pending Obligation
BA	9999	Any lease form	126	Emergency Protective Mea	в	L	\$0.00	0%	0%	0%	112	Pending Obligation
PA	9999	Any Texas Town	75	EXP Astesios Abatement	в	i.	\$0.00	6%	0%	0%	11/3	Pending Obligation
PA	1909	Any Toots Toom	490	Harry Park Trail	G	i.	S0.00	C%6	07%	0%	nia	Printing Obligation
P8	0909	Any Toxas Tourn	11	TOST	ε	t.	\$0.00	0%	0%	0%	n'a	Pensing Coligation
							\$377,781.90					

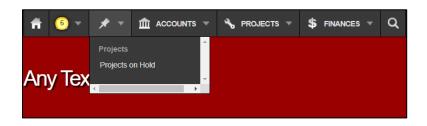
 The Create Preset from Listing window will appear. To build the preset, enter the "Preset Name," select "+ Add New Category," or select an existing category from the drop down menu. If selecting "+ Add New Category," enter the "New Category Name," select the number of results to be displayed per page,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

asic Information		Other Information	
Preset Name:	Projects on Hold	Category:	+ Add New Category
	This will be the name of the link in your menu.	New Category Name:	Projects
Listing:	Project	Results Per Page:	25 -
ilter Options:			
Grant / Applicant	Project	General	Custom
		On Hold	Project Version Status
Program	🔲 Туре		
Program     Grant	Type Size	<ul> <li>Yes No</li> </ul>	Has Closeout Request

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

1 Save as Menu Pres												
	2											
Preset Saved												
tk Search												
ox search.										7 results	• 🖞	8
• Program	Grant #	Applicant Name	Proj F#	Project Title	Proj S	Size Eligible Amt	F %	Expended %	Fede	7 results State	• Y Status	•
	Grant #	Applicant Name Any Texas Town	<b>Proj F#</b> 900	Project Title Pct 2 and 3 - Road Damage	Proj S		<b>F %</b> 75%	Expended %	Fede			
+ Program										State	Status	in Pro

#### Saved Presets



#### Custom Menu

Manage 🕨 Custom Menu	
Projects	
Projects on Hold	Drag links here to create a new category or Click here to create a new
	preset.

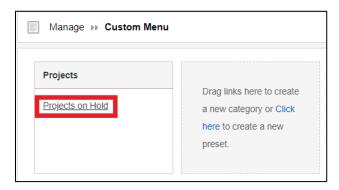
## **Edit or Delete a Preset**

### 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.)* 

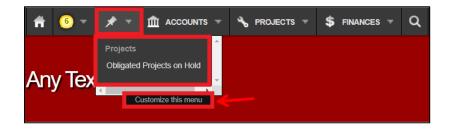
asic Information		Other Information	
Preset Name:	Obligated Projects on Hold	Category:	Projects
	This will be the name of the link in your menu.		
Listing:	Project	Results Per Page:	25 •
ilter Options:			
Grant / Applicant	Project	General	Custom
	Project	<ul> <li>On Hold</li> </ul>	Custom Project Version Status
Grant / Applicant			
Grant / Applicant	Туре	<ul> <li>On Hold</li> </ul>	Project Version Status

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

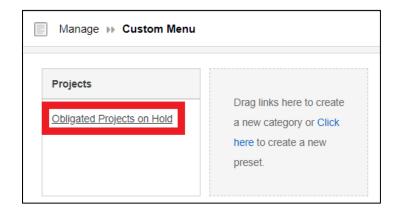
Add Custom Menu Link	÷	Request Additional Access	
Preset Saved 🔶		-	
Summary		Manage 🕨 Custom Menu	
Manage Basic Information Profile Picture Change Password	>	Projects Obligated Projects on Hold	Drag links here to create a new category or Click here to create a new
Custom Menu Received Emails			preset.

## **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.



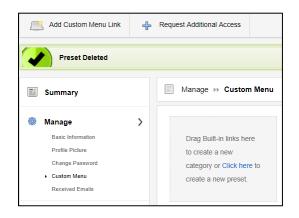
2. At the **Custom Menu** page, click the link of the **Preset** to be deleted.



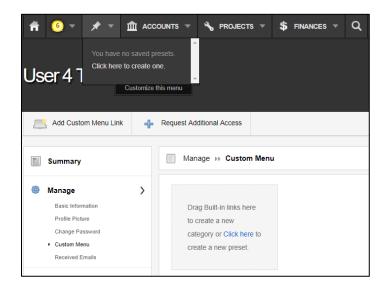
3. Click the *"Delete Preset"* button. A window will display asking *"Are you sure?"* (Are you sure you want to delete this preset?) Click the *"Yes"* button to delete.

Basic Information			Other Information		
Preset Name:	Obligated Pro	ojects on Hold	Category:	Projects	•
Listing:	This will be the n	• Are you sure?		ŀ	
filter Options: Grant / Applicant		Are you sure you want to o	felete this preset?		Custom
Program		4	Yes	Cancel	Project Version Status
Grant		C size			Has Closeout Request
			Deleted		

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.

0000 Public Assistance Test Grant (PA)     >     >       FFY2018 Q3: Apr       Routing Complete		000 (PA)-Any Tesas Town 018			
😙 Return 📻 Delete					More 👻
Summary >	Quarterly Report De	tails		•	🧇 Grant 🔹
Projects	This form is to report the pr and this form is due within	ogress of projects on a quarterly basis. The quarter 15 days of each end date.	end dates are December 31,	March 31, June 30, September 30	9999 Public Assistance Test Grant Public Assistance Declared: August 25, 2017
🕎 Form	Period:	2018 Q3 (Apr 1, 2018 - Jun 30, 2018)			Emergency Deadline: February 25, 2018 Permanent Deadline: February 25, 2019
Notes	Project Count:	2			
	Viewed Count:	2 Projects (100.0%)			Applicant •
Documents	100% Complete Count:	0 Projects (0.0%)			Any Texas Town
😡 Workflow	Fully Closed Count:	0 Projects (0.0%)			Sherman County (5 - Northwest Texas Region Region) FIPS #: 000-TEST0-00
🕥 History	Workflow Summary				State #: 90052 FEIN #: 11111111 Vendor #: DUNS #: 111222333
	Current Step:	4) Complete Extended Description: Complete			Type: City PhysicalMailing: 1 Longhorn Drive Sherman, TX,
	Last Advanced:	Nov 8, 2018 at 1:06 PM by Maria Salazar	322 days	s ago	
	Last Note Added:	Nov 8, 2018 at 1:06 PM by Maria Salazar	322 days	s ago	
	Submission:	Jul 19, 2018 at 8:54 AM by User 1 Test	434 days	8 ago	
Notes & Comments			Add Note	No Uploaded Documents	Add Document
				No Issues	Add Issues

## 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.

	1st Quarter 2018 Late SL	Select a Type All Delinquency Letter Quarterly Report	Internal Only	×
ocume		of files that can be uploaded, h nation such as Social Security I		

## 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.

				Documents		<ul> <li>Upload Files</li> </ul>						
🧭 Choose File to Uple	oad							×				
← → ~ ↑ 📙	> This PC > Docum	ients > Jo	ob Aids Documents			v ð Se	arch Job Aids Doo	cuments 🔎	to upload			
Organize 👻 New	w folder						855	- 🔳 🕐				
💭 This PC	^	Name	^		Date modified	Туре	Size		ed, however the maximum s ion should not be uploaded.	Personal		
3D Objects		۸ 🛃	30.18 FEMA-4332-DR-	TX Any Texas To	1/4/2019 9:39 AM	Adobe Acrobat D	145 KB		s license, passport, or other adit/debit card numbers.	identification	ites	
🧾 Desktop			.15.18 FEMA-4332-DR	,		Adobe Acrobat D	145 KB					
🗄 Documents			.15.18 FEMA-4332-DR .15.18 FEMA-4332-DR			Adobe Acrobat D Adobe Acrobat D	145 KB 145 KB		Choose Fi	les Cancel		
<ul> <li>Downloads</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> </ul>	- 1						110100			No Uploaded Do	cuments	Add Document
SDisk (C:)										Noissues		
	File name: "10.15.18	EMA-433	2-DR-TX Any Texas To	wn, Private Roads D	ebris Removal Map"	"9.30.18 FEMA~ ~	ll Files (*.*) Open	∽ Cancel	S@DPS.TEXAS.GOV			EMGrantsPR

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.

ົ ເ	Ipload Files		
₹3	9.30.18 FEMA-4332-DR-	Select a Type All Engineering Review Approval	×
₹	10.15.18 FEMA-4332-DF	FEMA Letter / Determination Memo Grantee DAC Support Indirect Cost Rate Allocation Plan Project Case File Project Reports	×
₩	10.15.18 FEMA-4332-DF	Proof of Ownership/Responsibility Write off Authorization PA Fixed Cost Estimate Subaward Agreement	×
1	10.15.18 FEMA-4332-DF	Select a Type	×
Docum identifia number	ents containing unredacted pers able information includes social s	files that can be uploaded, however the maximum size onal identifiable information should not be uploaded. P eccurity numbers, driver's license, passport, or other ide d financial account or credit/debit card numbers. Choose Files	ersonal entification

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.

Document Templates	
> Balance Detail	
Uploaded Documents	Add Document
> 10.15.18 FEMA-4332-DR-TX Any of Intent for Debris Removal from (Project Case File)	r Texas Town, Notice Private Roads
> 10.15.18 FEMA-4332-DR-TX Any Roads Address List (Project Case	r Texas Town, Private e File)
> 10.15.18 FEMA-4332-DR-TX Any Roads Debris Removal Map (Pro	Texas Town, Private
9.30.18 FEMA-4332-DR-TX Any Expedited PWs for Debris Remov	Texas Town,
Nolssues	

## 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.
- 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.

Add a Note		
To:	Select Recipients	Show CC
Subject:		
Body:		
Step:	Not specific to any step	•
		Add Cancel

# 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

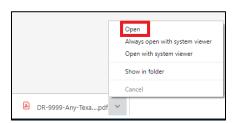
 Click the "Documents" tab on the left hand menu. Then click on either "Item Documents" or "Related Documents."

Zip and Download 🔹	Creat	e Ne <i>u</i> Re	quest					More
Summary		Docu	ments ++ Related Docume	nts				
Vrojects		Relati	ed Documents					
	Qu	ick Seard	n.				6 results 🕒 🎙	7 🗃 á
Payments			Title	Name	Туре	Item Path	- Created D	Created B
31 Quarterly Reports		12	Account for 9999 (PA) - A	DR-9999 Any Texas Town DSA 3.2	Designation S	9999 (PA) / Any Texas Town	Mar 29, 2019	User 2 Tes
Contacts		-	Project Closeout #3	DR-9999   Any Texas Town   PW 74	Project Compl	9999 (PA) / Any Texas Town / Project #900 - Pct 2 and	Mar 6, 2019	User 2 Te
Comacts		73	Time Extension #3	DR-9999 PW 74 Time Extension	Time Extensio	9999 (PA) / Any Texas Town / Project #74 - EXP Asbe	Mar 6, 2019	User 2 Te
Notes		12	Time Extension #2	5235FM S5	FEMA Respo	9999 (PA) / Any Texas Town / Project #900 - Pct 2 and	Aug 28, 2018	John Kind
Documents	<b>)</b> =	1	Time Extension #2	disaster closeout pa	Time Extensio	9999 (PA) / Any Texas Texm / Project #900 - Pct 2 and	Aug 28, 2018	John Kind
Item Documents		8	Time Extension #2	pms 8-27-18	Time Extensio	9999 (PA) / Any Texas Town / Project #900 - Pct 2 and	Aug 28, 2018	John Kind

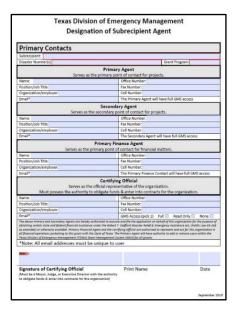
Click on the line that contains the document that you wish to view (lines are hyperlinked). When the Document Details window appears, click the blue "View" button.

	Assistance Test Cirent (FIK)		ry Truns I						<b>1</b>
Accoo Active	ount for 99	99 (	PA	)-/	Any Texas To	wn			HEIDENY
👲 Zo	p and Download 🔹	<b>1</b>	Create N	łew Re	quest				More -
🖭 Surr	nmary		6	Docu	ments >> Related Docume	nts			
🔏 Proj	jects			Relate	ed Documents			<ul> <li>Document Det</li> </ul>	tails
👸 Payı	ments			Searc	Title	Nemo	Туре	File Name:	DR-9999 Anv Texas Town DSA 3 29.19
31 Qua	arterly Reports			12	Account for 9999 (PA) - A	DR-9999 Any Texas Toom DSA 3.2	Designa	File Size:	203 KB
Con	tects		8	2	Project Closeout #3	DR-8999   Any Texas Town   PW 74	Project C	Item:	Account for 9999 (PA) - Any Texas Texm - 9999 (PA) / An
			•	12	Time Edension #3	DR-9999 PW 74 Time Extension	Time Ext	Older Versions:	nane
Note	es .		0	72	Time Extension #2	5235FM 85	FEMA R		
Doc	cuments	>	8	10	Time Extension #2	disaster closeout pa	Time Ed		
	em Documents alated Documents			8	Time Extension #2	pms 8-27-18	Time Ed		View Link Cicse

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.



#### **Edit Document**

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



 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**

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

Ocument Det.	ails
File Name:	DR-9999 Any Texas Town DSA 3.29.19
File Size:	203 KB
Item:	Account for 9999 (PA) - Any Texas Town - 9999 (PA) / An
Older Versions:	none
	View Edit Delete Move Link Close

 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**

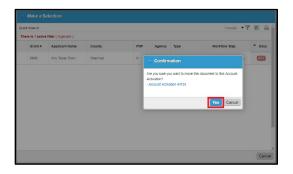
 Navigate to *"Item Documents"* of the desired workflow. Click on the document to be moved. Click the *"Move"* button.

File Size: 203 KB	
Item: Account for 9999 (	(PA) - Any Texas Town - 9999 (PA) / An
Older Versions: none	

 "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.

Move Document	
	A
Select Module:	Account Activation 👻
Select Document Type:	Designated Subrecipient's Agent Form •
	Choose Cancel

 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.

Document Det	ails
File Name:	DR-9999 Any Texas Town DSA 3.29.19
File Size:	203 KB
Item:	Account for 9999 (PA) - Any Texas Town - 9999 (PA) / An
Older Versions:	none
	View Edit Delete Move Link Close

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

<ul> <li>Link Document</li> </ul>			
Select Module:	Contact		•
		Choose	Cancel

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.

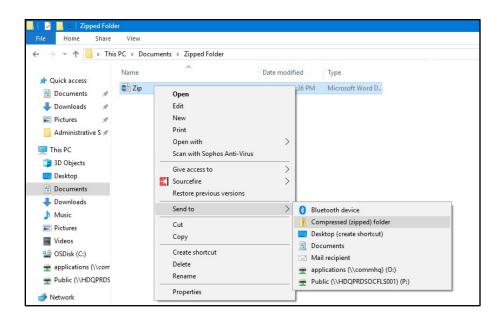
Duick Search: 101	4					4 results	• 🛛 🔳	8
First Name	Last Name	Email		Group(s)	Applicant?	Logins	Last Login	
Jser 1	Test	Userfig	aol.com	Applicant - Full Access	Y	151	Aug 14, 2019	
Jser 2	Test	User2	<ul> <li>Confirmat</li> </ul>	Y	18	Apr 27, 2017		
User 3	Test	User3	Are you sure you v	N	28	Jun 13, 2017		
User 4	Test	User4	- User 1 Test	Y	7	Mar 25, 2016		
				Yes Cancel	D			

# Zip a Large File

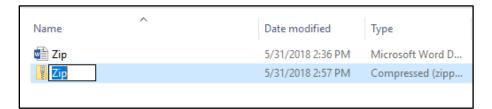
1. The maximum size for a document to be uploaded to the Grants Management System is 100MB. To upload a file that is larger than 100MB, zip the file before uploading it.

<ul> <li>Upload Files</li> </ul>
Choose some files to upload
Note: There is no limit to the number of files that can be uploaded, however the maximum size per file is 100MB. Documents containing personal information such as Social Security Numbers and Debit/Credit Card numbers should not be uploaded.
Close dialog after upload completes Choose Files Cancel

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.

No Uploaded Documents	Add Document

## **View Your Contacts**

 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.

fi 🖪 🖈 - 🏛	ACCOU	NTS 👻	s PROJE	стз 🔻	\$ FINANCES -	۹	Maria Salazar logged	l in as User 2 T	est ★ (2000) 🤋
Any Texas To	wn								READ-ONLY
Create New Request		Submit Ne	w Reimbursen	nent Reques	st				More -
Summary			Accounts						
Accounts	\$	Quick !	Search:					2 results	• 🍸 🖻 📇
Accounts	· ·		Program	Grant #	• Grant Name			Proj Count	Closed Date
Requests for Assistance Account Activation			HMGP	9999	Mitigation Plan Trac	ing		1	
Withdraw Requests			PA	9999	Public Assistance Te	st Grant		7	

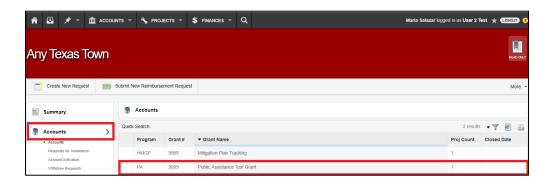
 Click on "Contacts," and the Applicant (your) contacts will display. If you need to update your contacts, complete a Designation of Subrecipient Agent (DSA) form found at <u>https://grants.tdem.texas.gov/site/Forms.cfm</u>. The form will be located under Common Forms. Submit a Support Ticket and attach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

**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.

9999 Public Assistance Test Grant (PA)	Any Texas Town									
Account for 9999	9 (PA) - Any Te	xas Town					READ.ONL			
Create New Request							More			
Summary	Contacts » Appli	cant								
X Projects	Quick Search:	Quick Search: 4 results • 🕎								
	▼ Name	Title	Bus Phone	Email	Notify	Is User	Position(s)			
😽 Payments	Joe Applicant	Emergency Manager	111-111-1111	joeapplicant@att.net	Ν	No	Authorized Agent, Primary			
Quarterly Reports	Mary Applicant	Emergency Manager 2	222-222-2222	noname2@yahoo.com	Ν	No	Alternate			
	User 1 Test	Test User	555-555-5555	Peter.Hull@dps.texas.gov	Y	Yes	Alternate			
Contacts Applicant	User 4 Test	Applicant Test	555-555-5555	User4@aol.com	Y	Yes	Secondary State Contact			
State										

## **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.

9999 Public Assistance Test Grant (PA)	iny Texas Town				
Account for 9999 (	(PA) - Any Te	xas Town			READOR
Create New Request					More
Summary >	Account Details			•	🧇 Grant -
🔏 Projects	Authorized Agent:	Joe Applicant - Emergency Manager			9999 Public Assistance Test Grant Public Assistance
😽 Payments	Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)			Declared: January 18, 2017 Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
33 Quarterly Reports	Eligible Obligated:	\$377,781.90 \$377,781.90 Not Expended			Applicant
Contacts Applicant State	Federal Obligated:	\$990,781.78 (262.26%) \$317,299.79 Un-Paid View Graph			Any Texas Town Sherman County (5 - Northwest Texas Region Region)
Notes	State Obligated:	\$24,192.84 (6.40%) \$24,192.84 Un-Pald View Graph			FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 11111111 Vendor #: DUNS #: 111222333
Documents	Local Share:	\$36,289.27 (-168.66%)			Type: City Physical/Mailing: 1 Longhorn Drive
1 History	Advances Requested:	\$0.00	Expand		Sherman, TX,

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.

9999 Public Assistance Test Grant (PA)		<sup>ny Texas Town</sup> (PA) - Any Texa	as Town					READ ONLY
Create New Request								More •
Summary		Contacts IN State						
		Quick Search:						3 results 🔍 🍸 📳 📇
		▼ Name	Title	Bus Phone	Email	Notify	Is User	Position(s)
is Payments	>	Colleen O'Neal	Section Administrator Region 4 & 5	806-740-8936	colleen.oneal@dps.texas.gov	Y	Yes	Other
31 Quarterly Reports		Theresa West	PA Grant Coordinator	806-740-8935	theresa.west@dps.texas.gov	Y	Yes	Other
Contacts Applicant State	>	User 3 Test	Test	555-555-5555	User3@aol.com	Ν	Yes	Primary State Contact

## 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.)

Any Texas To	wn							READ-ONLY
Create New Request	<b>100</b>	Submit N	lew Reimburse	ment Request				More •
Summary			Accounts					
Accounts	>	Quick	Search:			2 results	• \	8
Accounts			Program	Grant #	▼ Grant Name	Proj Count	Closed [	Date
Requests for Assistance Account Activation			HMGP	9999	Mitigation Plan Tracking	1		
Withdraw Requests			PA	9999	Public Assistance Test Grant	7		
Appeals Account Closeouts								
💥 Projects								
😹 Payments	>							
<b>Quarterly Reports</b>								
Contacts								
Notes								
Documents								
🕥 History								

## **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, <u>https://grantee.fema.gov/#applicants/subrecipient</u>.
- 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.

Any Texas Towr	)					RE	AD ONLY
Create New Request	🔄 Subm	nit New Reimburse	ment Request			м	lore •
Summary		Accounts					
Accounts	Q	uick Search:			2 results	• 🍸 📓	
<ul> <li>Accounts</li> </ul>		Program	Grant #	▼ Grant Name	Proj Count	Closed Date	
Requests for Assistance Account Activation		HMGP	9999	Mitigation Plan Tracking	1		
Withdraw Requests Appeals Account Closeouts		PA	9999	Public Assistance Test Grant	7		
🎽 Projects							
👸 Payments							
<b>Quarterly Reports</b>							
Contacts							
Notes							
Documents							
③ History							

# Submit Request for Public Assistance (RPA)

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

Grant	s Portal **
Dashboard      My Organization      Texas Division of Emergency     Management (000-0007-00)	Resources
Management (000-U007c-00) ✓ My Tasks ✓	Public Assistance Project Forms > Collection of FEMA forms to help you organize and submit costs for reimbursement.
Subrecipients ✓ Subrecipient Tasks ✓	FEMA Public Assistance: Policy and Guidance > This section of the site contains information about policy and guidance on the FEMA Public Assistance Program. This page provides access to the FEMA Public Assistance Program and Policy Guide as well as other Public Assistance Program policies, guidance, and publications.
<ul> <li>✓ Utilities</li> <li>✓</li> <li>Intelligence</li> <li>✓</li> </ul>	Grants Portal Resources V Resources, Job alds, and user guides for the Grants Portal.
Solution of the second seco	Applicant: Grants Portal User Manual Manual going over basic functions that guides Applicants how to use the Grants Portal.

- 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 <u>TDEMRecovery.rpa@tdem.texas.gov</u> 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)

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

# 🛛 🖈 -	🏦 accounts 👻 🔧 pr	KOJECTS - \$ FINANCES - Q		Maria Salazar logged in as User 4 Test 🏾 👲 ★	LOSOUT) 🧿
	Search Grants, Applicants and				
Any Texas <sup>-</sup>	Q,				READ-CHLY
	Requests & Forms				
	Requests for Assistance	Grant Listing			
(S) New Communicatio	Account Activation	Applicant Listing	est		0
0	Withdraw Requests	Account Listing			
	Appeals	Account Contact Listing			
Summary	Account Closeouts	Communication Listing			
		Issue Listing		- 😭 Applicant	•
Accounts		Investment Justification Report		Any Texas Town	

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

Request	s for A	ssistance					
Save as Me	nu Preset						
Quick Search:						1 results 🔹 🎙	7 🖻 🖀
• Program	Grant #	Applicant Name	County	Grant Portal Status	Submitted	Workflow Step	Days
PA	9999	Any Texas Town	Sherman		Jan 18, 2	5) Complete	14

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.

Requests for Assistance										
E	Save as Men	u Preset								
Quick	(Search:						1 results 💌 🤊	7 8 8		
	• Program	Grant #	Applicant Name	County	Grant Portal Status	Submitted	Workflow Step	Days		
	PA	9999	Any Texas Town	Sherman		Jan 18, 2	5) Complete	15		

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

Requests for Assistance										
Save as Menu Preset										
Quick Search:						1 results	• 🍸 🖻			
• Program	Grant #	Applicant Name	County	Grant Portal Status	Submitted	Workflow Step	Da			
PA	9999	Any Texas Town	Sherman		Jan 18, 2	5) Complete	1			

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

Protec Assistance Test Distri (PA)	Texain Town Account for 9999	S FINANCES - Q	Maria Bala	zar logged in as User 4 Test 📔 ★ 💶	RUCC
					•
Summary >	Deliverables			🧼 Grant	•
Form	View All Completed Deliver	rables		8888 Public Assistance Test Grant Public Assistance	
Notes	Request for Assistance	nce Detalls		Declared: January 18, 2017 Emergency Deadline: July 18, 2017 Permanent Deadline: January 18, 201	8
Documents	This form notifies the State Applicant details as well as	of the intent to participate in a given newly declared key contacts are specified.	Grant. The	📱 Applicant	
Workflow	Grant:	9999 Public Assistance Test Grant		Any Texas Town	
History	County:	Sherman 🗹 Disaster Declared Within County		Sherman County (5 Region) FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 11111111	
	Primary/Authorized Contact:	Joe Applicant Emergency Manager No System Access		Vendor #: DUNS #: 111222333 Type: City Physical/Mailing: 1 Longhom Drive Sherman, TX,	
	Alternate Contaot:	Mary Applicant Emergency Manager 2 No Bystem Access			
	Was PDA done:	Y			
	Counties Affected:	Sheman			
	Account Activation Status:	1) Review Requirements and Obtain Signatures			
	E Workflow Summary		•		
	Current Step:	5) Complete Extended Description: System Initiates Account Ac	tivation		
	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	39 days ago		
s & Comments		Add Note	Document	tTemplates	
	There are currently no notes.		> RPA Fo	m	
	Be the first to add one		No Upload	ded Documents	d Docur

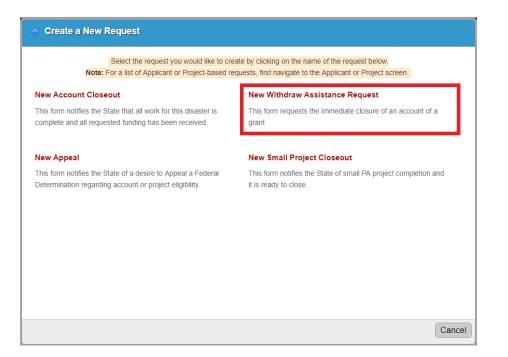
## Withdraw Requests for Assistance

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

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

9999 Public Assistance Test Grant (PA)	ny Texas Town				
Account for 9999 (	(PA) - Any Te	xas Town			READ-ONLY
Create New Request					More -
Summary >	Account Details			•	🧇 Grant -
💥 Projects	Authorized Agent:	Joe Applicant - Emergency Manager			9999 Public Assistance Test Grant Public Assistance
😝 Payments	Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)			Declared: January 18, 2017 Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
III Quarterly Reports	Eligible Obligated:	\$377,781.90 \$377,781.90 Not Expended			Applicant -
Contacts	Federal Obligated:	\$990,781.78 (262.26%) \$317,299.79 Un-Paid			Any Texas Town Sherman County (5 - Northwest Texas
Notes		View Graph			Region Region) FIPS #: 000-TEST0-00
Documents	State Obligated:	\$24,192.84 (6.40%) \$24,192.84 Un-Paid View Graph			State #: 90052 FEIN #: 111111111 Vendor #: DUNS #: 111222333
③ History	Local Share:			Physical/Mailing: 1 Longhorn Drive	
	Advances Requested:	\$0.00	Expand		Sherman, TX,

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	* -	<b>1</b>	CCOUNTS -	🔸 PROJECTS 🚽	\$ FINANCES -	۹		Maria Salazar logged in as User 4 Test 🧕	
-	ate		vny Texas To V WI		count for 4029 (PA) - Any Texas 7		ŧ			
	Save	¢	Submit	Can	cel					
	¥ Form			>	Form					
c		L	e	3	Reason:	a	ple: "No eligi	ble damage" or "Damage	is below FEMA's required minimum amount of \$1,000".	
				3	Notes:	b				
										d
Notes	& Comm	ents						Add Note	No Uploaded Documents	Add Document
					re are currently no note: Be the first to add one	5.			No Issues	Add Issues

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.

1999 Public Assistance Test Grant (PA)         Any Texas Town         Withdraw Assistance Request         Draft								
👌 Submit 🛛 📷 Delete								
📰 Summary 💦 刘	B Deliverables							
🛐 Form	Attached a signed Notification of Withdrawal for Assistance form (for Public Assistance grant) or a signed Notification of Withdrawal letter (for Hazard Milgation grant), as appropriate.							
E Notes	[Completed By You] View All Completed Deliverables							

 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**.

Warning!
The following requirements must be completed before you can advance:
Deliverables
Okay

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

9999 Public Assestance Test Grant Withdraw Ass Draft & Submit			1 to 2002 (04) - Joy Texas Texas t	Common More	
Summary	>	Deliverables	•	🧇 Grant 🔹	
Form		Attached a signed Netification of Withdrawal for Assistance form (for Public Assistance grant) or a signed Notification of Withdrawal letter (for Hazard Mitigation grant), as appropriate. [Completed By You] Vev Al Completed Delevables		9999 Public Assistance Test Grant Public Assistance Declared: August 25, 2017 Emergency Deadline: February 25, 2018 Permanent Deadline: February 25, 2019	
Documents		🗐 Withdraw Assist	ance Request Details -	Applicant -	
😹 Workflow		This form requests the	immediate closure of an account of a grant	Any Texas Town	
8 History		Reason:	No Eligible Damage	Sherman County (5 - Northwest Texas Region Region) FIPS #: 000-TEST0-00	
		Notes:	Description	State #: 90052 FEIN #: 111111111 Vendor #:	
		Request for Assistance:	Request for Assistance #1143	DUNS #: 111222333 Type: City Physical/Mailing: 1 Longhorn Drive Sherman, TX,	

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

Submit this Withdraw Assistance Request					
Before Submitting below.	g this Withdraw Assistance Request please fill out the necessary information	*			
	Leave a note:				
	$\bigcirc$				
		+			
Cancel	Submit				

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."* 

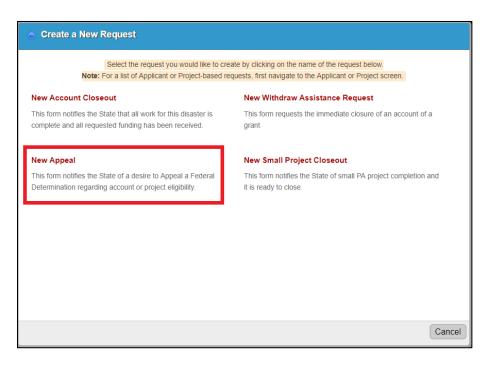
$\checkmark$	•
Successfully Submitted	
You have submitted this Withdraw Assistance Request. You can see the workflow progress below.	
Submission Review Validate Confirm Complete Withdraw Withdraw Status Request	Ŧ
Close Go To Account	

## **Create Account Appeal**

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

2000 Public Assistance Test Grant (PA)       >         Account for 9999         Active         Create New Reguest	Any Texas Town (PA) - Any Tex	xas Town			Radiology More -
Create New Regulast					more •
Summary >	Account Details			-	🌳 Grant 🔹
🔏 Projects	Authorized Agent:	Joe Applicant - Emergency Manager			9999 Public Assistance Test Grant Public Assistance
😸 Payments	Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)			Declared: January 18, 2017 Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
31 Quarterly Reports	Eligible Obligated:	\$377,781.90 \$377,781.90 Not Expended			Applicant •
Contacts	Federal Obligated:	\$990,781.78 (262.26%) \$317,299.79 Un-Paid			Any Texas Town
Notes		View Graph			Sherman County (5 - Northwest Texas Region Region)
Documents	State Obligated:	\$24,192.84 (6.40%) \$24,192.84 Un-Paid View Graph			FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 111111111 Vendor #: DUNS #: 111222333
S History	Local Share:	\$36,289.27 (-168,66%)			Type: City Physical/Mailing: 1 Longhorn Drive
	Advances Requested:	\$0.00	Expand		Sherman, TX,

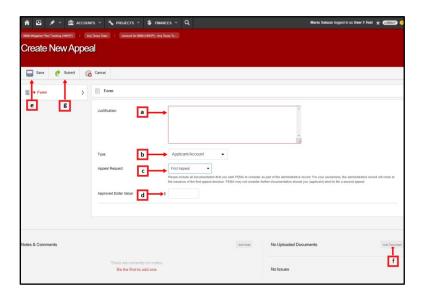
2. The following screen will display. Click "New Appeal."



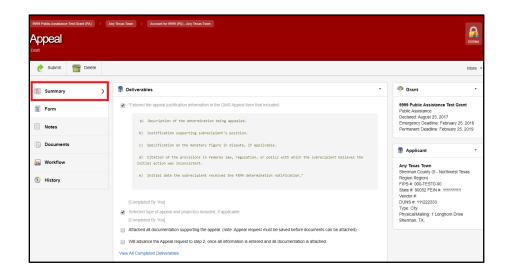
- 3. The form will display. Complete the form:
  - a. Enter the "Justification" (why appeal is needed).
  - b. Select *"Type"* of Appeal from the drop down menu (*Applicant/Account in this example*).
  - c. Select *"Appeal Request"* from the drop down menu (*First Appeal in this example*).
  - d. Enter "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.

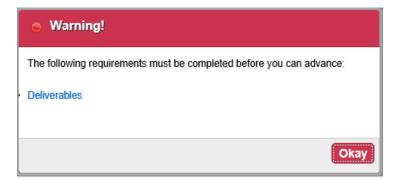
### **Appeal Form**



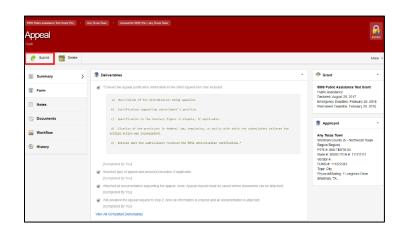
- 4. After you have saved the form, click the *"Summary"* tab on the left side menu to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific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



 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.

Before Submittin	g this Appeal please fill out	the necessary info	mation below.	
	Leave a note:			

 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."

$\bigcirc$	*
Successfully Submitted	
You have submitted this Appeal. You can see the workflow progress below.	
Submission Verify Send Review Validate Completeness Appeal Appeal Draft of and	v
Close 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.

ny Texas Town	nints 👻 🔧 projects :	∽ \$FRANCES ∞ Q	Moria Selaz	ar logged in as User 1 Test \star 🚥
Create New Request	Submit New Reimbursement Re	quest		More
Summary >	Applicant Details		•	Apply for a Grant
Accounts	Unique Applicant ID:	2501		There are currently 12 Grants open. If you
Projects	FEIN #:	11111111		wish to apply, please click the Apply Now button below.
Frojecis	DUNS #:	111222333		Apply Now
Payments	Account Count:	2 Accounts Open		
Quarterly Reports	Project Count:	8 Projects 6 Unobligated 2 Obligated - Large (All Open)		
Contacts	Quarterly Report Count:	No Active QRs (View All)  1 Overdue Qwarterly Report		
Notes	Eligible Obligated:	\$377.781.90		
Documents	Federal Obligated:	\$990,781.78 (262.28%) View Graph		
History	State Obligated:	\$24,182.84 (6.40%) View Graph		
	Local Share:	\$35,289,27 (-168,60%)		

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*).

Any Texas Tov	wn						READO
Create New Request	200	Submit New Reimburs	ement Reques	a			More
Summary		Accounts					
Accounts	`	Quick Search:			2 results	• \	8
<ul> <li>Accounts</li> </ul>		Program	Grant #	Grant Name	Proj Count	Closed E	Jate
Requests for Assistance Account Adivation		HMGP	9999	Mttgation Plan Tracking	1		
Withdraw Requests Appeals		PA	9099	Public Assistance Test Grant	7		
Account Closeouts							

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

Create New Request				
				Ma
🗈 Summary 🔰 👌	Account Details			• Ørant
🕷 Projects	Authorized Agent:	Joe Applicant - Emergency Manager		9999 Public Assistance Test Grant Public Assistance
😽 Payments	Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)		Declarect: January 18, 2017 Emergency Decaline: July 18, 2021 Permanent Deadline: January 18, 2023
Quarterly Reports	Eligible Obligated:	\$377,781.90		Applicant
Contacts	Federal Obligated:	\$377,781.90 (100.00%) \$377,781.90 Paid (100% Paid)		Any Texas Town
Notes		View Graph		Sherman County (5 - Northwest Texas Region Region)
	State Obligated:	\$0.00 (0.00%)		FIPS #. 000-TEST0-00 State #. 90052 FEIN #. 11111111
Documents	Local Share:	\$0.00 (0.00%)		Vendor # DUNS #: 111222333
History	Advances Requested:	\$0.00	Expand	Type: Oily Physical/Mailing: 1 Longhom Drive Streman, TX

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)*.

												Mon
Summary	>	🄏 Projects										
Projects	>	Quick Search:									7 results	• 🛛 🖻 🖁
Projects	·	▼ Proj	Proj S#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status
Project Versions		11		Test	E	L.	\$0.00	0%	0%	0%	n/a	Closed Oct 08, 2
Applications Time Extensions		74		EXP Asbestos Abatement and E	в	L	\$135,853.46	100%	n/a	100%	n/a	Closed Oct 08, 2
Project Closeouts Scope Modification / Cost Char		75		EXP Asbestos Abatement and E	в	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08, 2
Project Appeals	~~	126		Emergency Protective Measures City Wide	в	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08, 2
Small Project Closeout		205		DR-4332-City Emergency Protective	в	L.	\$0.00	0%	0%	0%	n/a	Closed Oct 08, 2
Payments		490		Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08, 2
		900		Pct 2 and 3 - Road Damage	с		\$241.928.44	100%	n/a	100%	n/a	Closed Oct 08. 2

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.

Project #74 - EXF		ene (N). Ary Trade Tene Patement and E (L, Cat B)	1	
Create New Request				Ma
Summary >	Project Details		Ŧ	🌼 Grant
Funding	Number:	F# 74		9999 Public Assistance Test Grant Public Assistance
Expenses	Title:	EXP Asbestos Abatement and E		Declared: January 18, 2017 Emergency Deadline: July 18, 2021
	Туре:	B - Emergency Protective Measures		Permanent Deadline: January 18, 2023
Payments	Reference Number:	EXP3350	/	Applicant
Progress Monitoring	Eligible Obligated:	\$135,853.46 (L)	Expand	Any Texas Town
Contacts	Federal Obligated:	\$135,853.46 (100.00%) Obligated Approved: Obligated Pending Approval:	Collapse - \$135,853.46 \$0.00	Sherman County (5 - Northwest Texas Region Region) FIPS #: 000-TEST0-00
Notes		Federal: 100%	\$135,853.46	State #: 90052 FEIN #: 111111111 Vendor #: DUNS #: 111222333
Documents				Type: City Physical/Mailing: 1 Longhorn Drive Sherman, TX,
History		Paid (\$135,853.46) Payments In Process (\$0.00)		Sherman, TX,
history		Un-Paid - Ready to Pay (\$0.00)		
		Un-Paid (\$0.00)		
	State Obligated:	\$0.00 (0.00%)		
	Local Share:	\$0.00 (0.00%)		
	Advances Requested:	\$0.00	Expand	
	Work Complete %:	100.00% Quarterly Report is 0.00% complete. Project Version 0 is 100.00% complete.		
	Project Status:	Closed Oct 08, 2018		
	Work Deadline:	January 18, 2020 (override)		

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

Create New Request				
Citate Hear Heapen				Mo
Summary	>	C Account Details		- 🧇 Grant
¥ Projects		Authorized Agent:	Joe Applicant - Emergency Manager	9999 Public Assistance Test Grant Public Assistance
Bayments		Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)	Declared: January 18, 2017 Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
Quarterly Reports		Eligible Obligated:	\$377,781.90 \$377,781.90 Expended	Applicant
Contacts		Federal Obligated:	\$990,781.78 (262.26%) \$317,299.79 Un-Paid	Any Texas Town Sherman County (5 - Northwest Texas
Notes			View Graph	Region Region) FIPS # 000.TEST0.00
Documents		State Obligated:	\$24,192.84 (6.40%) \$24,192.84 Un-Paid View Graph	State #: 90052 FEIN #: 11111111 Vendor #: DUNS #: 111222333
		Local Share:	\$36,289,27 (-168,66%)	Type: City Physical/Mailing: 1 Longhorn Drive

7. Select "New Account Closeout."

Oreate a New Request	
	create by clicking on the name of the request below. I requests, first navigate to the Applicant or Project screen.
New Account Closeout	New Withdraw Assistance Request
This form notifies the State that all work for this disaster is complete and all requested funding has been received.	This form requests the immediate closure of an account of a grant
New Appeal	New Small Project Closeout
This form notifies the State of a desire to Appeal a Federal Determination regarding account or project eligibility.	This form notifies the State of small PA project completion and it is ready to close.
	Cancel

- 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.

# Notes & Comments Deter sint currently no notes. Be the first to add ore

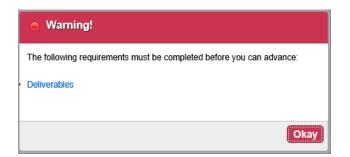
#### Account Closeout Form

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.

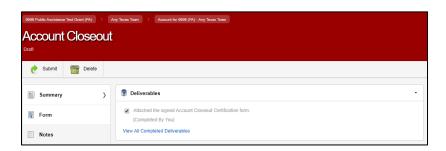
**Note:** Each **Deliverable** must be checked off/completed before the form can be submitted.

6000 Public Assistance Test Grant (PA) > Ar Account Closeout Draft	y Taxas Town > Account for 0000 (PA) - Any Texas Town
Elete 🔂 Submit	
🖺 Summary 💦	Deliverables
🛐 Form	Attached the signed Account Closeout Certification form. View All Completed Deliverables
Notes	

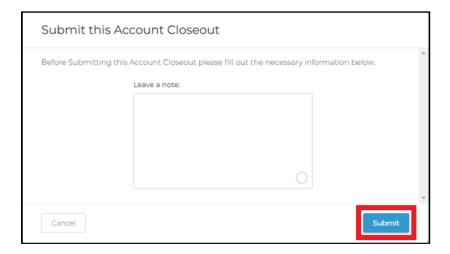
10. If you click the *"Submit"* button prior to verifying that all Deliverables have been completed, the following warning will display. Click the *"Okay"* button to return to the **Deliverables**.



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."* 

	Su	ccessfully S	) ubmitted		*
		below.		workflow progress	
Initiate Account Closeout	Review Account Closeout	Validate Letter	Validate Account Readiness	Review and e- Sign	
		Close	lo Account		Ŧ

## **Find a Project**

 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.

fi 🖸 🖈 - 🏛	ACCOUNTS	👻 🔧 PROJ	ECTS 👻	\$ FINANCES - Q			Maria Salazar logo	ged in as <b>User 1 T</b>	est ★	LOGOUT	2
Any Texas To	wn									READ	-
Create New Request	Subr	nit New Reimburse	ment Request							Mor	е •
Summary	1	Accounts									
Accounts	<u>م</u>	uick Search:						2 results	• 🕎	2	8
Accounts	-	Program	Grant #	<ul> <li>Grant Name</li> </ul>				Proj Count	Closed	Date	
Requests for Assistance Account Activation		HMGP	9999	Mitigation Plan Tracking				1			
Withdraw Requests		PA	9999	Public Assistance Test Gr	Grant			7			П
Appeals Account Closeouts											

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

9999 Public Assistance Test Grant (PA)	uny Texas Town				
Account for 9999 ( Active	(PA) - Any Te	xas Town			READONE
Create New Request					More
Summary >	C Account Details			•	🧇 Grant 🔹
💥 Projects	Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)			9999 Public Assistance Test Grant Public Assistance Declared: August 25, 2017
Payments	Eligible Obligated:	\$377,781.90 \$377,781.90 Not Expended			Emergency Deadline: February 25, 2018 Permanent Deadline: February 25, 2019
<b>Quarterly Reports</b>	Federal Obligated:	\$317,299.79 (83.99%)			Applicant -
Contacts		\$317,299.79 Un-Paid View Graph			Any Texas Town Sherman County (5 - Northwest Texas Region Region)
Documents		Paid (\$0.00)			FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 111111111 Vendor #: DUNS #: 111222333
S History		Un-Paid (\$317,200.70)			Type: City Physical/Mailing: 1 Longhorn Drive Sherman, TX,
	State Obligated:	524192.84 (640%) 524192.84 Un-Paid View Graph Paid (30.00) In Process (30.00) Un-Paid (324.192.84)			
	Local Share:	\$36,289.27 (9.61%)			
	Advances Requested:	\$0.00         RFA Approved           \$0.00         RFA Approved           \$0.00         RFA Approval In Process           \$0.00         Paid           \$0.00         Ready To Pay           \$0.00         Unallocated Balance	Expand		
	Authorized Agent:	Joe Applicant - Emergency Manager			

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

999 Public Assistance Test Grant (PA)		Any Texas			_								L
Account for 999	9	(Pa	.) - An	y Tex	as Town								READ
Create New Request													Мо
Summary	>	*	Projects										
Projects		Quic	k Search:									7 results	• 🝸 📓
Projects	<i>′</i>		• Proj	Proj S#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status
Project Versions			11		Test	Е	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08,
Applications Time Extensions			74		EXP Asbestos Abatement and E	В	L	\$135,853.46	100%	n/a	100%	n/a	Closed Oct 08,
Project Closeouts Scope Modification / Cost Change			75		EXP Asbestos Abatement and E	В	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08,
Project Appeals			126		Emergency Protective Measures City Wide	В	L.	\$0.00	0%	0%	0%	n/a	Closed Oct 08,
Small Project Closeout			205		DR-4332-City Emergency Protective	В	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08,
S Payments			490		Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Closed Oct 08,
Quarterly Reports			900		Pct 2 and 3 - Road Damage	С	L	\$241,928.44	100%	n/a	100%	n/a	Closed Oct 08,
								\$377,781.90					

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

		atement and E (L, Cat B)		LL.
Create New Request				More
Summary >	Project Details			🧇 Grant 👻
Funding	Number:	F#74		9999 Public Assistance Test Grant Public Assistance
Expenses	Title:	EXP Asbestos Abatement and E		Declared: January 18, 2017 Emergency Deadline: July 18, 2021
	Туре:	B - Emergency Protective Measures		Permanent Deadline: January 18, 2023
Payments	Reference Number:	EXP3350		Applicant
22 Progress Monitoring	Eligible Obligated:	\$135,853.46 (L)	Expand	Any Texas Town
-	Federal Obligated:	\$135,853.46 (100.00%)	Expand	Sherman County (5 - Northwest Texas Region Region)
Contacts	State Obligated:	\$0.00 (0.00%)		FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 11111111
Notes	Local Share:	\$0.00 (0.00%)		Vendor #: DUNS #: 111222333
Documents	Advances Requested:	\$0.00	Expand	Type: City Physical/Mailing: 1 Longhorn Drive
③ History	Work Complete %:	100.00% Quarterly Report 2019 Q1: Oct-Dec is 100.00% complete. Project Version 0 is 100.00% complete.		Sherman, TX,
	Project Status:	Closed Oct 08, 2018		
	Work Deadline:	January 18, 2020 (override)		

## Find Project Worksheet (PW) & Supporting Documentation

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.

9999 Public Assistance Text (PA)  Amy Project #93 - EXI Open				
Create New Request				More
Summary	Project Details		•	🧇 Grant 🗸
🕞 Funding >	Number:	F# 93		9999 Public Assistance Test Grant Public Assistance Declared: January 18, 2017
Project Versions     Funding Log	Title:	Emergency Work		Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
Cost Lines	Alternate Title:	EXP - Cat B		
Expenses	Type:	B - Emergency Protective Measures		😭 Applicant -
	Reference Number:	EXP3350		Any Texas Town
is Payments	Eligible Obligated:	\$391,085.12 (L)	Expand	Sherman County (5 - Northwest Texas Region Region)
Progress Monitoring	Federal Obligated:	\$391,075.03 (100.00%)	Expand	FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 111111111
_	State Obligated:	\$0.00 (0.00%)		Vendor #: DUNS #: 111222333
Contacts	Local Share:	\$0.00 (0.00%)		Type: City Physical/Mailing: 1 Longhorn Drive
Notes	Advances Requested:	\$304,375.16	Expand	Sherman, TX,
Documents	Work Complete %:	100.00% Quarterly Report 2019 Q1: Oct-Dec is 100.00% complete. Project Version 4 is 100.00% complete.		
S History	Work Deadline:	February 25, 2018		
	In Process Requests:	Quarterly Report (1)	Expand	

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).* 

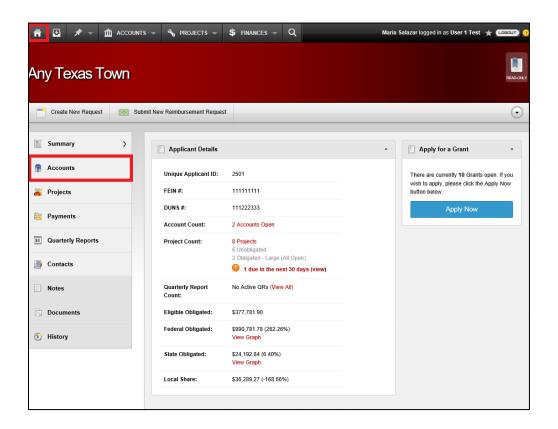
0000 Public Assistance Test Grant (PA Project #93 - E Open		Any Texas Town		ar 9999 (PA) - Any Texas	Town						EDITING
Create New Request						_					More •
Summary		🗊 Fund	ing ⊯ Projec	t Versions							
🎯 Manage	$\rightarrow$	Quick Searc								5 results 🔹 🍸	
		-	# Size	Bundle	Eligible Amount	Fed %	Status	Federal Amt	Obligated	Workflow Step	Days
Funding	>	0	L	93	\$304,375.16	100%	Obligated	\$304,375.16	Nov 24, 2017	6) Complete	477
<ul> <li>Project Versions</li> <li>Funding Log</li> </ul>		1	L	93	\$86,609.06		Obligated	\$77,948.15	Jul 5, 2018	6) Complete	259
Cost Lines		2	L	93	\$0.00	2%	Obligated	\$8,660.91	Dec 18, 2018	6) Complete	34
Expenses		3	L	93	-\$1,262.25		Obligated	-\$1,136.03	Feb 13, 2019	6) Complete	34
Rayments		4	L	93	\$1,363.15		Obligated	\$1,226.84	Feb 27, 2019	6) Complete	25
Progress Monitoring					\$391,085.12			\$391,075.03			

 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 #93: Project		999 (99) - Any Taxon Propert #50 - EXP - Call B (L, Cal				
					More	•
Summary >	Deliverables				🐢 Grant	
Jummary )	View All Completed Delivera	shlar			9999 Public Assistance Test Grant	
🎲 Manage	view for completed Derivary	and a			Public Assistance Declared: January 18, 2017	
Cost Lines	Details				Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023	
Notes	Sequence #:	1				
	Ref#:	EXP3350			Applicant	•
Documents	Bundle #:	93			Any Texas Town Sherman County (5 - Northwest Texas	
Workflow	Package #:	618			Region Region) FIPS #: 000-TEST0-00	
S History	Obligated Date:	July 5, 2018			State #: 90052 FEIN #: 111111111 Vendor #:	
	Eligibility Status:	Eligible			DUNS #: 111222333 Type: City	
	PW Notification:	< no value >			Physical/Mailing: 1 Longhorn Drive Sherman, TX,	
	Eligible Amount:	\$86,609.06				
	Cost Share Flag:	No			🕌 Project	,
	Federal Amount:	\$77,948.15			F #93	
	Admin Amount:	\$0.00			Emergency Work B Emergency Protective Measures	
	Work Complete %:	100%			Work Deadline: February 25, 2018 Eligible: \$391,085.12 (L)	
	Expense Review:	All Expenses should be reviewed to see if any app eligible	proved amounts are	e no longer	Federal: \$391,075.03 (100%) Un-Expended Eligible: \$727.90	
	Is Donated Resources:	No				
	Workflow Summary			•		
	Current Step:	6) Complete Extended Description: Version becomes active in GMS.				
	Last Advanced:	Jul 10, 2018 at 5:38 PM by Cory McCabe	259 days	s ago		
	Submission:	Jul 9, 2018 at 8:05 AM by Maria Salazar	260 days	ago		
Notes & Comments			Add Note	Uploaded Documents	Add Documer	t
	There are current	y no notes.		<ul> <li>DR-4332 Any Texas Town P\ Consideration)</li> </ul>	V93 REC Report (Record of Environmental	

# **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.



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

🚔 🗷 🖈 - 🏛	ACCOU	NTS 👻	s PROJ	ECTS 👻	\$ FINANCES -	۹	Maria Salazar loggi	ed in as User 1 T	est ★ 🚥	
Any Texas To	wn									READ-ONLY
Create New Request	<b>199</b>	Submit Ne	w Reimburse	ment Request	t					More •
Summary			Accounts							
Accounts	\ \	Quick S	Bearch:					2 results	• 🝸 🗧	
Accounts			Program	Grant #	<ul> <li>Grant Name</li> </ul>			Proj Count	Closed Dat	e
Requests for Assistance Account Activation			HMGP	9999	Mitigation Plan Track	ing		1		
Withdraw Requests			PA	9999	Public Assistance Te	st Grant		7		
Appeals Account Closeouts										

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

0000 Public Assistance Test Grant (PA)     >       Account for 99999       Active	Any Texas Town (PA) - Any Te	xas Town	Ricco
Create New Request			More
∎ Summary >	Account Details		• 🐢 Grant •
🎽 Projects	Project Count:	7 Projects 5 Lincolligated 2 Obligated - Large (All Open)	9999 Public Assistance Test Grant Public Assistance Declared: January 18, 2017 Emergency Deadline: July 18, 2021
<ul> <li>Payments</li> <li>Quarterly Reports</li> </ul>	Eligible Obligated:	\$377,781.90 \$377,781.90 Not Expended	Permanent Deadline: January 18, 2023
Contacts	Federal Obligated:	5900,717,72,022,25%) 5317,299,79 Un-Paid View Graph	Applicant     Any Texas Town
Documents		Paid (\$0.00)	Sherman County (5 - Northwest Texas Region Region) FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 11111111 Vendor #:
S History		In Process (\$0.00) Un-Paid (\$317,299.79)	DUNS#: 111222333 Type: City Physical/Mailing: 1 Longhorn Drive Sherman, TX,
	State Obligated:	524.192.84 (6.40%) \$24.192.84 Un-Paid View Graph	
		100***	
		<ul> <li>Faid (\$0.00)</li> <li>In Process (\$0.00)</li> <li>Un-Paid (\$24,192.84)</li> </ul>	

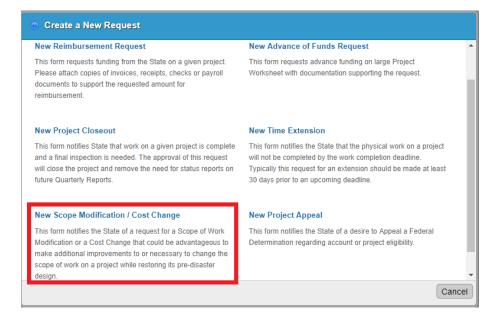
 A list of projects will display. Select the *"Project"* that needs the Scope Modification and/or Cost Change.

1900 Public Assistance Test Grant (PA)		Texas Town	_	_								
Account for 999	9 (F	PA)-An	y le>	kas lown								READA
Create New Request												Mor
Summary		🄏 Projects										
Projects	, I	Quick Search:									7 results	• 🝸 🖹
Projects		• Proj	Proj S#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status
Project Versions Applications	1	11		Test	Е	L	\$0.00	0%	0%	0%	n/a	Pending Obligat
Time Extensions	Ш	74		EXP Asbestos Abatement and E	в	L.	\$135,853.46	100%	0%	0%	n/a	Closeout in Prop
Project Closeouts Scope Modification / Cost Changes		75		EXP Asbestos Abatement and E	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligat
Project Appeals		126		Emergency Protective Measures City Wide	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligat
Small Project Closeout		205		DR-4332-City Emergency Protective	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligat
Payments		490		Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Pending Obligat
Quarterly Reports		900		Pct 2 and 3 - Road Damage	с	L	\$241,928.44	75%	0%	0%	0%	Closeout in Pro
Contacts							\$377,781.90					

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

Devoie Austrationse Text Grant (PA) > A Project #11 - Test ( rending Obligation		(P4) - Any Tesas Town		L
Create New Request				Mo
Summary >	Project Details			- 🦗 Grant
Funding	Number:	F# 11		9999 Public Assistance Test Grant Public Assistance
	Title:	Test		Declared: January 18, 2017 Emergency Deadline: July 18, 2021
Expenses	Type:	E - Public Buildings & Equipment		Permanent Deadline: January 18, 2023
Payments	Eligible Funds:	\$0.00 (L)		Applicant
Progress Monitoring	Federal Funds:	\$0.00		
	Advances Requested:	\$0.00	Expand	Any Texas Town Sherman County (5 - Northwest Texas
Contacts Notes	Work Complete %:	98.00% Quarterly Report is 0.00% complete. Project Version is 0.00% complete.		Region Region) FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 11111111 Vendor #:
Notes	Project Status:	Pending Obligation		DUNS #: 111222333 Type: City
Documents	Work Deadline:	January 18, 2023		Physical/Mailing: 1 Longhorn Drive Sherman, TX,
History	Process Checklist			•
	Initial Obligation     Pending Obligation     Project Management     Project Closeout			

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.
  - 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.

Create New Scope	e Modification / Cost Change
🔚 Save 🥐 Submit 🌾	Gancel
↑ ↑	
🛒 ¥ Form 🔰	Form
i I	Type: Select One
	Description:
	Justification:
	Funding Change: d Choose One
	Anticipated Cost:
	Source of Additional Funds f
	Work Performed By: Choose One
	Anticipated Completion Date
	Additional Comments:
	E Constantino de la c
Notes & Comments	Add Note No Uploaded Documents Add Document

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.

Funding Change:	<b>م</b>	Requesting Additional Funds - Cost Overrun
Federal Share:	s	
State Share:	s	
Local Share:	s	

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.

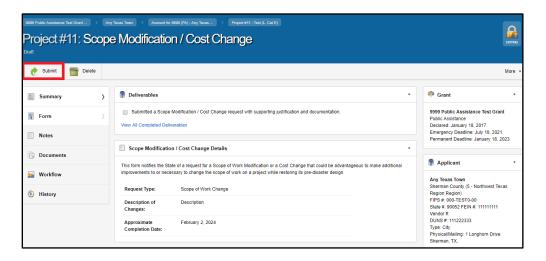
*Note:* Each *Deliverable* must be checked off/completed before the form can be submitted.

9999 Public Assistance Test Grant >	9999 Public Assistance Test Grant > Any Texas Town > Account for 9999 (PA) - Any Texas > Project #11 - Test (L, Cat E)								
Project #11: Scope Modification / Cost Change									
Draft									
🔥 Submit 🛛 🗃 Delete									
Summary >	To Deliverables -								
🛒 Form	Submitted a Scope Modification / Cost Change request with supporting justification and documentation.								
	[Completed By You]								
Notes									

 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**.

Warning!
The following requirements must be completed before you can advance:
Deliverables
Okay

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.

Submit this	Scope Modification / Cost Change
Before Submitting 1 information below.	his Scope Modification / Cost Change please fill out the necessary
	Leave a note:
Cancel	Submit

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

	Su	ccessfully Su	ubmitted		*
	267232	Scope Modification	ss below.		
Submission	Review Request	Validate Letter	Technical Review	Sign Letter	
					*
		Close Co T	o Project		

## **Project Time Extension**

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

f 🗄 🖈 🚽 🏦 accounts	; 🚽 🔧 PROJECTS 🚽	\$ finances - Q	Maria Salazar logged in as User 1 Test 🔺 (Loucour) 🤅
Any Texas Town			RENDOM
Create New Request 500 Subr	nit New Reimbursement Request		$\odot$
📰 Summary >	Applicant Details		Apply for a Grant
Accounts	Unique Applicant ID:	2501	There are currently 10 Grants open. If you wish to apply, please click the Apply Now
🔏 Projects	FEIN #:	111111111	button below.
😽 Payments	DUNS #:	111222333 2 Accounts Open	Apply Now
31 Quarterly Reports	Project Count:	8 Projects 6 Unobligated	
Contacts		2 Obligated - Large (All Open) 1 due in the next 30 days (view)	
Notes Notes	Quarterly Report Count:	No Active QRs (View All)	
Documents	Eligible Obligated:	\$377,781.90	
3 History	Federal Obligated:	\$990,781.78 (262.26%) View Graph	
	State Obligated:	\$24,192.84 (6.40%) View Graph	
	Local Share:	\$36,289.27 (-168.66%)	

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

An	y Texas To	wn						READ-OI
	Create New Request	in Si	ubmit Ne	ew Reimbursem	ent Request			C
1	Summary		8	Accounts				
	Accounts	>	Quid	ck Search:			2 results	• 🍸 🗃 🔮
	<ul> <li>Accounts</li> </ul>			Program	Grant #	▼ Grant Name	Proj Count	Closed Date
	Requests for Assistance Account Activation			HMGP	9999	Mitigation Plan Tracking	1	
	Withdraw Requests		Г	PA	9999	Public Assistance Test Grant	7	
	Appeals Account Closeouts							
*	Projects							
8	Payments							

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

9999 Public Assistance Test Grant (PA)	y Texas Town		
Account for 9999 (	PA) - Any Te	kas Town	READ ONLY READ ONLY
Active			
Create New Request			More -
Summary >	Account Details		• Grant •
😹 Projects	Project Count:	7 Projects 5 Unobligated	9999 Public Assistance Test Grant Public Assistance Declared: January 18, 2017
Payments	Eligible Obligated:	2 Obligated - Large (All Open) \$377,781,90 \$377,781,90 Not Expended	Encanded Submary 14, 2021 Encergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
Quarterly Reports	Federal Obligated:	\$990,781.78 (262.26%) \$317.299.79 Un-Paid	Applicant -
Contacts		View Graph	Any Texas Town Sherman County (5 - Northwest Texas
Notes			Region Region) FIPS #: 000-TEST0-00 State #: 00052 FEIN #: 11111111
Documents		Paid (\$0.00)	Vendor #: DUNS #: 11222333 Type: City
S History		Un-Paid (\$317,200.70)	Physical/Mailing: 1 Longhorn Drive Sherman, TX,
	State Obligated:	524,192,84 (6,40%) 524,192,84 Un-Paid View Graph	
		Paid (\$0.00)	
		In Process (\$0.00)	
	Local Share: Advances Requested:	\$36,289.27 (-168.66%) \$0.00 Expand	
	Advances Kequested:	S0.00         RFA Approved         Expand           \$0.00         RFA Approved         Process           \$0.00         Paid         Process           \$0.00         Paid         Process           \$0.00         Paid         Process           \$0.00         Payment In Process         Payment In Process           \$0.00         Ready To Pay         Payment In Process           \$0.00         Ready To Pay         Payment In Process	
	Authorized Agent:	Joe Applicant - Emergency Manager	

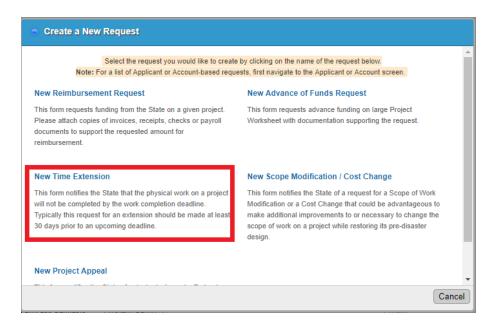
4. This will display a list of all **Projects** for the Grant. Select the *"Project"* that needs a **Time Extension**.

	ublic Assistance Test Grant (PA) ) An		/ Τον	ae Tr	own							
enir					0,011							READ
-	Create New Request											0
1	Summary	🄏 Projects										
*	Projects >	Quick Search:									7 results	• 🍸 🗃
	<ul> <li>Projects</li> </ul>	▼ Proj	Proj S#	Proj	Proj	Size	Eligible Amt	F %	Expended %	Feder	State	Status
	Project Versions	11		Test	Е	L	\$0.00	0%	0%	0%	n/a	Pending Obligati
	Applications Time Extensions											
	Project Closeouts	74		EXP	В	L	\$135,853.46	100%	0%	0%	n/a	Open
	Scope Modification / Cost Changes	75		EXP	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligati
	Project Appeals Small Project Gloseout	126		Emer	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligati
		205		DR-4	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligati
8	Payments	490		Harry	G	L	\$0.00	0%	0%	0%	n/a	Pending Obligati
1	Quarterly Reports	900		Pct 2	С	L	\$241,928.44	75%	0%	0%	0%	Open
	Contacts						\$377,781.90					

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

Create New Request	Project Details			🧼 Grant
Funding				🦚 Grant
	Number:	5 × 6 × 6		
Expenses		F# 900		9999 Public Assistance Test Grant Public Assistance
	Title:	Pct 2 and 3 - Road Damage		Declared: January 18, 2017 Emergency Deadline: July 18, 2021
Durante	Туре:	C - Roads and Bridges		Permanent Deadline: January 18, 2023
Payments	Reference Number:	COM0228C		Applicant
Progress Monitoring	Eligible Obligated:	\$241,928.44 (L)	Expand	
Contacts	Federal Obligated:	\$181,446.33 (75.00%)	Expand	Any Texas Town Sherman County (5 - Northwest Texas
	State Obligated:	\$24,192.84 (10.00%)	Expand	Region Region) FIPS #: 000-TEST0-00
Notes	Local Share:	\$36,289.27 (15.00%)		State #: 90052 FEIN #: 111111111 Vendor #:
Documents	Advances Requested:	\$0.00	Expand	DUNS #: 111222333 Type: City
History	Work Complete %:	50.00% Quarterly Report 2018 Q3: Apr-Jun is Project Version 0 is 1.00% complete.	s 50.00% complete.	Physical/Mailing: 1 Longhorn Drive Sherman, TX,
	Work Deadline:	January 18, 2025 (override)		

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.

9999 Public Assistance Test Greet ) Any Project #900: Time	Texas Town > Account for 9599 (PA) - Any Texas	> Project #000 - Pot 2 and 3 - Road		
Draft				EDITING
🔚 Save 🥐 Submit 🗑	Delete			More +
Summary	Form			
f >	Requested Completion Date:	Select One		
Notes	Work Performed By:	Select One   Select One  Select One  C) Contract and Force Account Labor and C) Contract and Force Account		
Documents	Justification:	7	A	
Workflow				
S History		multe a detailed timeline of detaut is easimption with documents	d justification describing the extenuating circumstances or unusual project requi	inconstrained
	ar Current Percent Complete:		pproval consideration. Add attachments as necessary for a complete request do	
	Milestones			
	Detailed timeline for completing the remainder	of the work on this project.		
	Projected Date Actual Date	Description		
		Add Line		
Notes & Comments		Add Note	No Uploaded Documents	Add Document
	There are currently no notes. Be the first to add one		No Issues	g

#### Time Extension Form

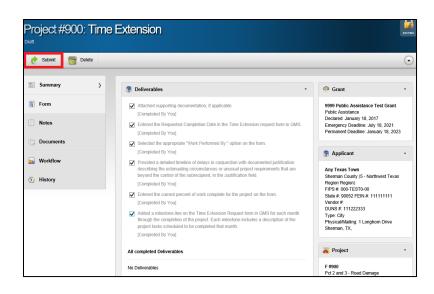
- 8. After you have saved the form, click the *"Summary"* tab on the left side menu, to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific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

0000 Public Assistance Test Grant > Any	Texas Town > Account for 9000 (PA) - Any Texas > Project #000 - Pet 2 and 3 - Road
Project #900: Time	Extension
Draft	
🔶 Submit  📷 Delete	
Summary >	Deliverables
· · · · · · · · · · · · · · · · · · ·	Altached supporting documentation, if applicable.
🛒 Form	[Completed By You]
Notes	Entered the Requested Completion Date in the Time Extension request form in GMS.
	Selected the appropriate "Work Performed By:" option on the form.
Documents	Provided a detailed timeline of delays in conjunction with documented justification describing the extenuating circumstances or unusual project requirements that are beyond the control of the subrecipient, in the Justification field.
Workflow	Entered the current percent of work complete for the project on the form.
1 History	Added a milestone line on the Time Extension Request form in GMS for each month through the completion of the project. Each milestone includes a description of the project tasks scheduled to be completed each month.
	View All Completed Deliverables

 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**.



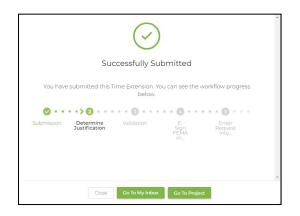
10.Click the *"Submit"* button when all of the Deliverables have been completed.



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

Submit this	Time Extension	
Before Submitting	this Time Extension please fill out the necessary information below.	*
	Leave a note:	
		~
Cancel	Submit	

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.

🚔 🛃 🖈 🕆 🏛 ACI	COUNTS 🥆 🔧 PROJECTS	▼ \$ FINANCES ▼ Q	Maria Salazar logged in as User 1 Test 🔺 (Loncur) (
Any Texas Towr	1		La Roas
Create New Request	Submit New Reimbursement R	equest	More
Summary	Applicant Details		• Apply for a Grant •
Accounts	Unique Applicant ID:	2501	There are currently 12 Grants open. If you wish to apply, please click the Apply Now
Projects	FEIN #:	11111111	button below.
	DUNS #:	111222333	Apply Now
is Payments	Account Count:	2 Accounts Open	
31 Quarterly Reports	Project Count:	8 Projects 6 Unobligated 2 Obligated - Large (All Open)	
Contacts	Quarterly Report	No Active QRs (View All)	
Notes	Count:	1 Overdue Quarterly Report	
	Eligible Obligated:	\$377,781.90	
Documents	Federal Obligated:	\$990,781.78 (262.26%) View Graph	
1 History	State Obligated:	\$24,192.84 (6.40%) View Graph	
	Local Share:	\$36,289.27 (-168.66%)	

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)*.

Any Texas Town							READ OF
Create New Request	Su	bmit New Reimburser	ment Request				More
Summary		Accounts					
Accounts >		Quick Search:			2 results	• \	8
Accounts		Program	Grant #	▼ Grant Name	Proj Count	Closed I	Date
Requests for Assistance Account Activation		HMGP	9999	Miligation Plan Tracking	1		
Withdraw Requests		PA	9999	Public Assistance Test Grant	7		
Appeals Account Closeouts							

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

Image: Segregation of the segregat		y Texas Town		Maria Salazar kogged in as User 1 Test 🖈 🥶 📖
Create New Request				More
Summary	>	Account Details		• 🧇 Grant •
🔏 Projects		Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)	9999 Public Assistance Test Grant Public Assistance Declared: August 25, 2017
Payments		Eligible Obligated:	\$377,781.90 \$377,781.90 Not Expended	Emergency Deadline: February 25, 2018 Permanent Deadline: February 25, 2019
31 Quarterly Reports		Federal Obligated:	\$317,299.79 (83.99%)	🕞 Applicant 🔹
Contacts			\$317,299.79 Un-Paid View Graph	Any Texas Town
Notes			1008	Sherman County (5 - Northwest Texas Region Region) FIPS #: 000-TEST0-00
Documents			Paid (\$0.00)	State #: 90052 FEIN #: 11111111 Vendor #: DUNS #: 111222333
S History			In Process (\$0.00) Un-Paid (\$317,299.79)	Type: City Physical/Mailing: 1 Longhorn Drive Sherman, TX,

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

Create a New Request						
	e by clicking on the name of the request below. uests, first navigate to the Applicant or Project screen.					
New Account Closeout	New Withdraw Assistance Request					
This form notifies the State that all work for this disaster is complete and all requested funding has been received.	This form requests the immediate closure of an account of a grant					
New Appeal	New Small Project Closeout					
This form notifies the State of a desire to Appeal a Federal Determination regarding account or project eligibility.	This form notifies the State of small PA project completion and it is ready to close.					
	Cancel					

- 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**

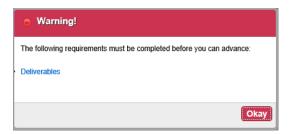
Create New Srr	nall Project Closeout			
Save 🥐 Submit	Cancel			
🛒 * Form	> Form +> Closeout Request			
ē ġ	Project(s):	#19 - Emergency Dispatch - CAT E #349 - City wide Debris (\$29,910.7 #803 - FA Labor to Restore Power	7)	
	Justification:	→		
	Eligible Amount:	37,301.76 Net Difference: \$37,301.76		
	Expended Amount:	The total amount of money that has been	n expended for all projects grouped together in this	remuert
			u mbaunon un mitrotese Brenkon collenier ur aus	
				f
Notes & Comments		Add Note	No Uploaded Documents	Add Document
	There are currently no notes. Be the first to add one		No Issues	Add Issues

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.

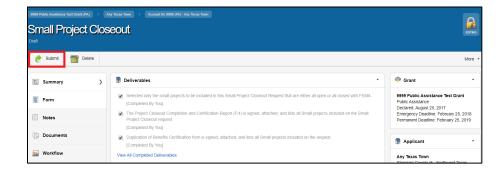
*Note:* Each *Deliverable* must be checked off/completed before the form can be submitted.

9999 Public Assistance Test Grant ( Small Project Draft		
👌 Submit 🛛 📷 D	slete	More •
Summary	> Beliverables -	🧇 Grant 🔹
📱 Form	Selected only the small projects to be included in this Small Project Closeout Request that are either all open or all closed with FEMA. [Completed By You]	9999 Public Assistance Test Grant Public Assistance
Notes	The Project Closeout Completion and Certification Report (P.4) is signed, attached, and lists all Small projects included on the Small Project Closeout request.	Declared: August 25, 2017 Emergency Deadline: February 25, 2018 Permanent Deadline: February 25, 2019
Documents	Duplication of Benefits Certification form is signed, attached, and lists all Small projects included on the request.      View AI Completed Deliverables	Applicant •

 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.

Submit this S	Small Project Closeout	
Before Submitting t	his Small Project Closeout please fill out the necessary information below.	*
	Leave a note:	
Cancel	Submit	Ţ

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."

Successfully Submitted
You have submitted this Small Project Closeout. You can see the workflow progress below.
Submission <b>Programmatic</b> Schedule Draft Letter Review & Letter Review Perform to
Close 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.

🛱 🖪 🖈 = 🏛 ACC	COUNTS - 🍾 PROJECTS	₹ FINANCES ₹ Q	
ny Texas Town	1		
			Ref.
Create New Request	Submit New Reimbursement R	equest	M
Summary	Applicant Details		- Apply for a Grant
Accounts	Unique Applicant ID:	2501	There are currently 12 Grants open. If wish to apply, please click the Apply No
Projects	FEIN #:	11111111	button below.
Projects	DUNS #:	111222333	Apply Now
Bayments	Account Count:	2 Accounts Open	
Quarterly Reports	Project Count:	8 Projects 6 Unobligated 2 Obligated - Large (All Open)	
Contacts	Quarterly Report	No Active QRs (View All)	
Notes	Count:	1 Overdue Quarterly Report	
	Eligible Obligated:	\$377,781.90	
Documents	Federal Obligated:	\$990.781.78 (262.26%) View Graph	
History	State Obligated:	\$24,192.84 (6.40%) View Graph	
		\$36,289.27 (-168.66%)	

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

Any Texas Town							READ-ONLY
Create New Request	S	ibmit New Reimburse	ment Request				More
Summary		Accounts					
Accounts		Quick Search:			2 results	• 🝸 🕯	s =
Accounts		Program	Grant #	▼ Grant Name	Proj Count	Closed Da	te
Requests for Assistance Account Activation		HMGP	9999	Mitigation Plan Tracking	1		
Withdraw Requests		PA	9999	Public Assistance Test Grant	7		
Appeals Account Closeouts							

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

ive	9 (PA) - Any Te	kas iowii		
Create New Request				
Summary	Account Details			• 🧇 Grant
🖌 Projects	Authorized Agent:	Joe Applicant - Emergency Manager		9999 Public Assistance Test Grant Public Assistance
😸 Payments	Project Count:	7 Projects 5 Unobligated 2 Obligated - Large (All Open)		Declared: January 18, 2017 Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 202
31 Quarterly Reports	Eligible Obligated:	\$377,781.90		Applicant
Contacts	Federal Obligated:	\$377,781.90 (100.00%) \$377,781.90 Paid (100% Paid)		Any Texas Town
Notes		View Graph		Sherman County (5 - Northwest Texa Region Region)
	State Obligated:	\$0.00 (0.00%)		FIPS #: 000-TEST0-00 State #: 90052 FEIN #: 11111111
Documents	Local Share:	\$0.00 (0.00%)		Vendor #: DUNS #: 111222333
History	Advances Requested:	\$0.00	Expand	Type: City Physical/Mailing: 1 Longhorn Drive

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

ny Texas To	bum											
Account for 9999 (PA) - Any Texas Town								READ ON				
												More
*	Projects											
Quick	Search:									7 results	• 🖤	8
	• Proj	Proj S#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status	
	11		Test	Е	L.	\$0.00	0%	0%	0%	n/a	Pending	Obligation
	74		EXP Asbestos Abatement and E	в	L.	\$135,853.46	100%	0%	0%	n/a	Open	
	75		EXP Asbestos Abatement and E	в	L	\$0.00	0%	0%	0%	n/a	Pending	Obligation
	126		Emergency Protective Measures City Wide	в	L.	\$0.00	0%	0%	0%	n/a	Pending	Obligation
	205		DR-4332-City Emergency Protective	в	L	\$0.00	0%	0%	0%	n/a	Pending	Obligatio
	490		Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Pending	Obligatio
	900		Pct 2 and 3 - Road Damage	с	L	\$241,928.44	75%	0%	0%	0%	Closeout	in Progr
						\$377,781.90						
	(PA)	Projects           Quick Search:           * Proj           11           74           205           205           400	PA) - Any Tex           Projects           Culck Search:           • Proj           11           75           126           205           490	PA) - Any Texas Town             Projects	Projects       Couck Search:          • Proj	Projects       Cuck Search:       Proj.     Proj 5#     Project Title     Proj     Size       1     Test     E     L       74     EXP Asbestos Abatement and E     B     L       75     EXP Asbestos Abatement and E     B     L       265     DR-4332-Chy Emergency Protective     B     L       490     Harry Park Trail     G     L	Projects           Cource Search:           * Proj.         Project Title         Proj         Size         Eligible Anti.           11         Test         E         L         50.00           74         EXP-Asbeston Abatement and E         B         L         513,853.46           75         EXP-Asbeston Abatement and E         B         L         50.00           126         Emergency Protective Measures City Wide         B         L         50.00           265         DR-4332-City Emergency Protective         B         L         50.00           490         Hury Plant Tital         G         L         50.00           900         Pic 2 and 3 - Road Damage         C         L         5241,528.44	Projects           Cource Search:         Project Title         Proj.         Size         Eighbe Amt         F %           11         Test         E         L         60.00         0%           74         EXPA Absterion Abatement and E         B         L         8135,853.46         100%           75         EXP Absterion Abatement and E         B         L         60.00         0%           126         Emergency Protective Measures City Wide         B         L         50.00         0%           205         DR-4332-City Emergency Protective         B         L         50.00         0%           490         Herry Park Trail         Q         L         50.00         0%           900         Pd 2 and 3 - Road Damage         C         L         5241, 528.44         7%	Projects           Cource search:         Project Title         Proj.         Size         Eligible Amt         F %         Expended %           11         Test         E         L         50.00         0%         0%           74         EXP Ablestos Ablatement and E         B         L         \$135.853.40         10%         0%           73         EXP Ablestos Ablatement and E         B         L         \$0.00         0%         0%           125         Emergency Protective Measures City Vide         B         L         \$0.00         0%         0%           205         DR-4332-Chy Emergency Protective         B         L         \$0.00         0%         0%           490         Harry Park Trait         G         L         \$0.00         0%         0%           900         Pd 2 and 3 - Road Damage         C         L         \$241.528.44         75%         0%	Projects         Project           Cource Search:         Project           11         Text         E         L         50.00         0%         0%         0%           74         EVP Albestos Abatement and E         B         L         51.00         0%         0%         0%           73         EXP Albestos Abatement and E         B         L         50.00         0%         0%         0%           126         Emergency Protective Measures CIV Wole         B         L         50.00         0%         0%         0%           205         DR-4332-City Emergency Protective         B         L         50.00         0%         0%         0%           400         Harry Park Trail         G         L         50.00         0%         0%         0%           900         Pc1 2 and 3 - Road Damage         C         L         52.02         52.41.928.44         75%         0%         0%	Projects         Project           Concentration         Project Title         Project           Total         Test         E         L         80.00         0%	Projects           Triplet           Outcome           Project           Triplet           Project Title         Project           Project           1         Test         Electron Abatement and E         B         L         0300         0%         0%         n/a         Product           7         EXP Abatemont Abatement and E         B         L         0300         0%         0%         n/a         Product           7         EXP Abatemont Abatement and E         B         L         0.00         0%         0%         n/a         Product N           7         EXP Abatemont Abatement and E         B         L         0.00         0%         0%         Nd         Product N           205         Derevision Abatement and E         B         L         0.00         0%<

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

Create New Request				
Summary >	Project Details			• 🧇 Grant
Funding	Number:	F# 74		9999 Public Assistance Test Grant Public Assistance
Expenses	Title:	EXP Asbestos Abatement and E		Declared: January 18, 2017 Emergency Deadline: July 18, 2021
Expenses	Type:	B - Emergency Protective Measures		Permanent Deadline: January 18, 20
Payments	Reference Number:	EXP3350		
Progress Monitoring	Eligible Obligated:	\$135,853.46 (L)	Expand	пр Аррисанс
,	Federal Obligated:	\$135,853.46 (100.00%)	Expand	Any Texas Town Sherman County (5 - Northwest Texa
Contacts	State Obligated:	\$0.00 (0.00%)		Region Region) FIPS #: 000-TEST0-00
Notes	Local Share:	\$0.00 (0.00%)		State #: 90052 FEIN #: 11111111 Vendor #:
	Advances Requested:	\$0.00	Expand	DUNS #: 111222333 Type: City
Documents	Work Complete %:	25.00% Quarterly Report 2018 Q3: Apr-Jun is 25.00% complete. Project Version 0 is 50.00% complete.		Physical/Mailing: 1 Longhorn Drive Sherman, TX,
Instory	Work Deadline:	January 18, 2020 (override)		

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

Create a New Request	
	by clicking on the name of the request below. ests, first navigate to the Applicant or Account screen.
New Reimbursement Request	New Advance of Funds Request
This form requests funding from the State on a given project. Please attach copies of invoices, receipts, checks or payroll documents to support the requested amount for reimbursement.	This form requests advance funding on large Project Worksheet with documentation supporting the request.
New Project Closeout	New Time Extension
This form notifies State that work on a given project is complete and a final inspection is needed. The approval of this request will close the project and remove the need for status reports on future Quarterly Reports.	This form notifies the State that the physical work on a project will not be completed by the work completion deadline. Typically this request for an extension should be made at least 30 days prior to an upcoming deadline.
New Scope Modification / Cost Change	New Project Appeal
This form notifies the State of a request for a Scope of Work	This form notifies the State of a desire to Appeal a Federal
	Cancel

- 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.

Save 🥐 Submit	Delete			$\odot$
Summary	Form			
e g >	Projects Included:	1 Project (change)		
Notes	Project:	Test - \$0.00 (change)		
Documents Workflow	Expended Amount:	Total claimed funds that have been exp - Documented Expenses in approved F - Eligible amount as currently calculate	eimbursement Requests: \$0.00	
History	Completion Date: <b>b</b>	Difference between expended and elip	jble amounts: \$0.00	
	Comments: C			
d	Closeout Checklist      Have all quarterly reports been s      Have all the staff completed the			Select One 🕶
	3. Have all reimbursements been s			Select One •
	4. Has the entire eligible amount be	een requested for reimbursement?		Select One 🕶
	5. All claims or actions pending for	this project are resolved.		Select One 🕶
	<ol> <li>All outstanding appeals or issue</li> <li>Has the most current NIMS Cert</li> </ol>	s are resolved. Ificate been provided in a quarterly report?		Select One
	2. The the most carrier rend car	many provides in a space of y report.		Select One -
es & Comments		Add Note	Document Templates	
	There are currently no notes.		> Project Closeout Form	Ϋ́
	Be the first to add one			+
			No Uploaded Documents	Add Document

#### **Project Closeout Form (Large)**

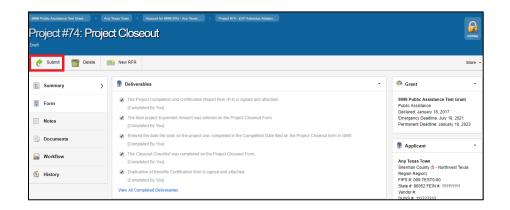
- 8. After you have saved the form, click the *"Summary"* tab on the left side menu to view the **Deliverables.** Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific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

B000 Public Assistance Test Grant								
🕐 Submit 📅 Delete 👔	New RFR							
Summary >	Deliverables							
🐺 Form	The Project Completion and Certification Report form (P.4) is signed and attached.							
Notes	The total project Expended Amount was entered on the Project Closeout Form. Entered the date the work on the project was completed in the Completion Date field on the Project Closeout form in GMS.							
Documents	The Closeout Checklist was completed on the Project Closeout Form. [Completed By You]							
Workflow	Duplication of Benefits Certification form is signed and attached.							
(5) History	View All Completed Deliverables							

 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.

Submit this	Project Closeout
Before Submitting t	his Project Closeout please fill out the necessary information below. Leave a note:
	Leave a note:
	×
Cancel	Submit

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

	$\bigcirc$			*
Suc	cessfully Su	Ibmitted		
You have submitted this Pro	oject Closeout. \ below.	′ou can see the w	orkflow progress	
⊘ · · · · > ② · · · ·	••• •••••	••• •••••	••• 6 ••••	
Submission Programmatic Review	Perform Site Inspection	Financial Compliance Review	Report Validation	
				Ŧ
	Close Go T	o 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.

ny Texas Town			Ŀ
Create New Request	Submit New Reimbursement R	equest	Мо
Summary	Applicant Details		- Apply for a Grant
Accounts	Unique Applicant ID:	2501	There are currently 12 Grants open. If ye
Projects	FEIN #:	11111111	wish to apply, please click the Apply No button below.
Frojects	DUNS #:	111222333	Apply Now
Bayments	Account Count:	2 Accounts Open	
1 Quarterly Reports	Project Count:	8 Projects 6 Unobligated 2 Obligated - Large (All Open)	
Contacts	Quarterly Report	No Active QRs (View All)	
Notes	Count:	1 Overdue Quarterly Report	
	Eligible Obligated:	\$377,781.90	
Documents	Federal Obligated:	\$990,781.78 (262.26%) View Graph	
History	State Obligated:	\$24,192.84 (6.40%) View Graph	
	Local Share:	\$36,289.27 (-168.66%)	

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

Any Texas Tow	'n						EAD-ONLY
Create New Request	<b>100</b>	Submit New Reimburse	ment Request			N	More
Summary		Accounts					
Accounts	`	Quick Search:			2 results	• 🝸 🔊	8
Accounts	<i>′</i>	Program	Grant #	▼ Grant Name	Proj Count	Closed Date	
Requests for Assistance Account Activation		HMGP	9999	Mitigation Plan Tracking	1		
Withdraw Requests Appeals		PA	9999	Public Assistance Test Grant	7		
Account Closeouts							

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

Projects     Projects     Projects     Projects     Projects       Projects     5 indicipated: 2 clospided: 2 clospi			
Projects       Project Count:       7 Projects       9999 Public Assistance Test Count:       9999 Public Assistance Test Count:       9999 Public Assistance Test Count:       Public Assistance Test Count:<	Account Detai		• Ø Grant
Payments     Eligible Obligated:     \$377,781.90       Quarterly Reports     Eligible Obligated:     \$377,781.90       Contacts     Federal Obligated:     \$377,281.90       Notes     Image: Contact State Stat	rojects Project Count:	5 Unobligated	
Contacts     Str7:399 79 Un-Paid       Contacts     Any Texas Town       Stores     Tops       Documents     Tep and (SD 00)	Eligible Obligated		Permanent Deadline: January 18, 202
Notes         Region Region           ) Documents         Paid (10.00)         State # 0002 FEIN # 111111		\$317,299.79 Un-Paid View Graph	Any Texas Town
Documents Paid (\$0.00) Vendor #:	stes		Region Region) FIPS #: 000-TEST0-00
History Type: Oby Physical/Mailing: 1 Longhorn Dr		In Process (\$0.00)	Vendor #: DUNS #: 111222333 Type: Oity Physical/Mailing: 1 Longhorn Drive
State Obligated: \$24,192.84 (640%) \$24,192.84 Un-Paid Veru 100%	State Obligated:	\$24,192.84 Un-Paid View Graph	

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

40	ublic Assistance Test Grant (PA)		ecas town PA) - Ar	ny Tex	kas Town								READ ON
Active	Create New Request												More
100 - 1 101 - 101	Summary		🔏 Projects										
*	Projects ) • Project Project Venions Applications Time Extensions Project Consounds Scope Modification / Cost Changes	c	Quick Search:									7 results	• 🍸 🗃 着
			• Proj	Proj S#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status
			11		Test	Е	L	\$0.00	0%	0%	0%	n/a	Pending Obligatio
			74		EXP Asbestos Abatement and E	в	L	\$135,853.46	100%	0%	0%	n/a	Closeout in Progr.
			75		EXP Asbestos Abatement and E	в	L.	\$0.00	0%	0%	0%	n/a	Pending Obligatio
	Project Appeals		126		Emergency Protective Measures City Wide	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligatio
	Small Project Closeout		205		DR-4332-City Emergency Protective	в	L	\$0.00	0%	0%	0%	n/a	Pending Obligatio
8	Payments		490		Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Pending Obligatio
31	Quarterly Reports	III.	900		Pct 2 and 3 - Road Damage	С	L	\$241,928.44	75%	0%	0%	0%	Closed Nov 20, 2.
	Contacts							\$377,781.90					

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

<b>10 PCI #900 - PC</b>	2 and 3 - Roa	ad Damage (L, Cat C)		REA
Create New Request				Me
Summary >	Project Details			• 🧇 Grant
Funding	Number:	F# 900		9999 Public Assistance Test Grant Public Assistance
	Title:	Pct 2 and 3 - Road Damage		Declared: January 18, 2017 Emergency Deadline: July 18, 2021
Expenses	Туре:	C - Roads and Bridges		Permanent Deadline: January 18, 2023
Payments	Reference Number:	COM0228C		
Progress Monitoring	Eligible Obligated:	\$241,928.44 (L)	Expand	Applicant
Progress Monitoring	Federal Obligated:	\$181,446.33 (75.00%)	Expand	Any Texas Town Sherman County (5 - Northwest Texas
Contacts	State Obligated:	\$24,192.84 (10.00%)	Expand	Region Region) FIPS # 000-TEST0-00
Notes	Local Share:	\$36,289.27 (15.00%)		State #: 90052 FEIN #: 11111111 Vendor #:
, notes	Advances Requested:	\$0.00	Expand	DUNS #: 111222333
Documents	Work Complete %:	50.00% Quarterly Report 2018 Q3: Apr-Jun is 50.00% complete. Project Version 0 is 1.00% complete.		Type: City Physical/Mailing: 1 Longhorn Drive Sherman, TX,
History	Project Status:	Closeout in Progress		
	Work Deadline:	January 18, 2020 (override)		

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

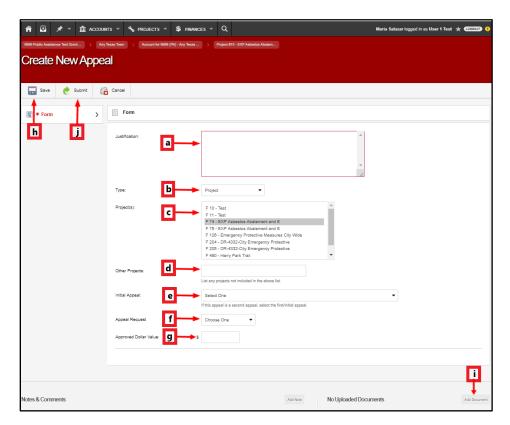
New Reimbursement Request	New Advance of Funds Request
This form requests funding from the State on a given project. Please attach copies of invoices, receipts, checks or payroll locuments to support the requested amount for eimbursement.	This form requests advance funding on large Project Worksheet with documentation supporting the request.
New Time Extension	New Scope Modification / Cost Change
This form notifies the State that the physical work on a project vill not be completed by the work completion deadline. Typically this request for an extension should be made at least 00 days prior to an upcoming deadline.	This form notifies the State of a request for a Scope of Work Modification or a Cost Change that could be advantageous to make additional improvements to or necessary to change the scope of work on a project while restoring its pre-disaster design.
New Project Appeal	
This form notifies the State of a desire to Appeal a Federal Determination regarding account or project eligibility.	

- 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.
- 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**

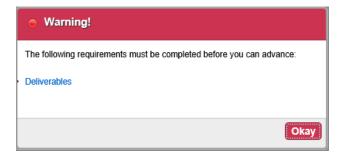


**Note:** The appeal <u>must</u> contain documented justification supporting the appeal including monetary amount in dispute. It must also include a citation of the provisions in federal law, regulation, or policy with which you believe the initial action was inconsistent.

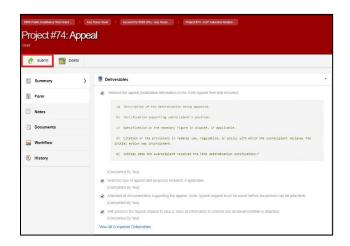
- 8. After you have saved the form, click the *"Summary"* tab on the left side menu, to view the **Deliverables**. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific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

9999 Public Austitutione Test Grant Any Texas Town Account for 9999 (PA)Any Texas Project #74 - EXP Auberton Abatem Project #74: Appeal				
Draft	u			
\varepsilon Submit 📷 Delete				
Summary >	Peliverables -			
Form	"Entered the appeal justification information in the GMS Appeal form that included:			
Notes	<ul> <li>a) Description of the determination being appealed.</li> <li>b) Justification supporting subvecipient's position.</li> </ul>			
Documents	<li>c) Specification on the monetary figure in dispute, if applicable.</li>			
Workflow	d) Citation of the provisions in federal law, regulation, or policy with which the subrecipient believes the initial action was inconsistent.			
③ History	e) Initial date the subrecipient received the FEMA determination notification."			
	[Completed By You] Selected type of appeal and project(s) included, if applicable.			
	Attached all documentation supporting the appeal. (note: Appeal request must be saved before documents can be attached)			
	Will advance the Appeal request to step 2, once all information is entered and all documentation is attached.			
	View All Completed Deliverables			

 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.

Before Submitting	this Appeal please fill out the necessary information below	V.
	Leave a note:	

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

	Su	uccessfully Su	bmitted		
	•>2 •	s Appeal. You can s	•• 🙆 •• •	Email	
	Appeal and	Submission	and e- Sign	Appeal Letter	÷
~		Close Go To	Project		

# Look Up an Existing Appeal

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).

ny Texas Town							READA
Create New Request	Submit New Rein	bursement Reque	ы				More
Summary	🔏 Project	s 😥 Project Ap	opeals				
Accounts	Quick Search:					1 results 🔹 🍸	8
Accounts	• Pro	Ir Grant #	Proj #	#	Justification	Workflow Step	Days
🖌 Projects 💦 👌	PA	9999	900	4	Appeal	2) Review Appeal and	0
Projects							
Project Versions							
Applications							
Worksheets							
Time Extensions							
Project Closeouts							
Scope Modification / Cost Changes							
<ul> <li>Project Appeals</li> </ul>							

 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.

9999 Public Assistance Test Grant						
Project #900: Apper Routing in Progress: Verify Completeness o						
Summary >	Deliverables ·					
🕎 Form	Verified the appeal request form in GMS is complete and meets the appeal criteria identified in 44 Code of Federal Regulations, Section 206 206 that includes the following information:					
Notes	<ul> <li>a) Description of the determination being appealed.</li> <li>b) Justification supporting subrecipient's position.</li> </ul>					
Documents	<ul><li>c) Specification on the monetary figure in dispute, if applicable.</li></ul>					
🔜 Workflow	d) Citation of the provisions in federal law, regulation, or policy with which the subrecipient believes the initial action was inconsistent.					
1 History	e) Initial date the subrecipient claimed to have received the FEMA determination notification."					
	Verified all documentation supporting the appeal is attached, if applicable. Resolved any deficiencies with the completeness of the appeal request with the subrecipient, if applicable. View All Completed Deliverables					
	Project Appeal Details -					
	This form notifies the State of a desire to Appeal a Federal Determination regarding applicant/account or project eligibility.					
	Type: Project					

# **Advance of Funds Request**

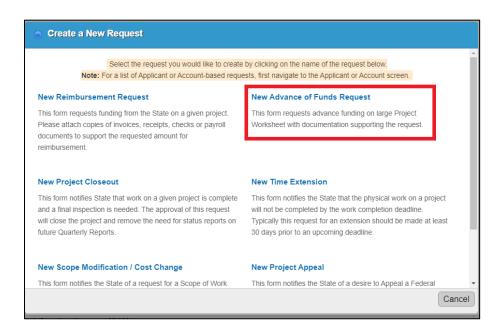
 Navigate to the *"Projects"* page for the desired grant. Select the *"Project"* for the Request for Advance.

Minde Analysis Teal Greet (TV) () // Any Texas Taw ccount for 9999 (PA) – Any Texas Town vo										AD C				
Create New Request													м	tor
Summary	🔏 Pr	ojects												
Projects	Quick Ser	arch:									7 results	• \	*	
Projects	-	Proj	Proj S#	Project Title	Proj	Size	Eligible Amt	F %	Expended %	Fede	State	Status		
Project Versions Applications	11			Test	Е	L.	\$0.00	0%	0%	0%	n/a	Pending	) Obliga	a
Time Extensions	74	1		EXP Asbestos Abatement and E	в	L.	\$135,853.46	100%	0%	0%	n/a	Open		
Project Closeouts Scope Modification / Cost Changes	75	5		EXP Asbestos Abatement and E	в	L	\$0.00	0%	0%	0%	n/a	Pending	) Obliga	a
Project Appeals Small Project Closeout	12	26		Emergency Protective Measures City Wide	в	L.	\$0.00	0%	0%	0%	n/a	Pending	) Oblig:	a
	20	05		DR-4332-City Emergency Protective	в	L.	\$0.00	0%	0%	0%	n/a	Pending	) Obliga	9
Payments	49	90		Harry Park Trail	G	L	\$0.00	0%	0%	0%	n/a	Pending	) Oblig:	a
Quarterly Reports	90	00		Pct 2 and 3 - Road Damage	с	L	\$241,928.44	75%	0%	0%	0%	Closeou	it in Pro	0
Contacts							\$377,781.90							

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

		3999 (PA) - Any Texas Town		
Proiect #74 - EXF	Asbestos Ab	atement and E (L, Cat B)		
Open	,			
Create New Request				More •
Summary >	Project Details			🧇 Grant 🔹
Funding	Number:	F# 74		9999 Public Assistance Test Grant Public Assistance
Expenses	Title:	EXP Asbestos Abatement and E		Declared: August 25, 2017 Emergency Deadline: February 25, 2018
Expenses	Туре:	B - Emergency Protective Measures		Permanent Deadline: February 25, 2019
is Payments	Reference Number:	EXP3350		Applicant -
Progress Monitoring	Eligible Obligated:	\$135,853.46 (L)	Expand	
	Federal Obligated:	\$135,853.46 (100.00%)	Expand	Any Texas Town Sherman County (5 - Northwest Texas
Contacts	State Obligated:	\$0.00 (0.00%)		Region Region) FIPS #: 000-TEST0-00
Notes	Local Share:	\$0.00 (0.00%)		State #: 90052 FEIN #: 111111111 Vendor #:
	Advances Requested:	\$0.00	Expand	DUNS #: 111222333 Type: City
Documents	Work Complete %:	25.00% Quarterly Report FFY2018 Q3: Apr 2018 - Jun 2018 is 25.00% complete.		Physical/Mailing: 1 Longhorn Drive Sherman, TX,
5 History		Quarterly Report FF12018 Q3: Apr 2018 - Jun 2018 is 25.00% complete. Project Version 0 is 50.00% complete.		
	Work Deadline:	January 18, 2020 (override)		

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



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

0000 Public Ausistance Test Grant					
Cancel	Items				
	To create a new Advance Request, you must associate an advance item. Create new Advance Item				

- 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**

Create Cancel				
e a b c	> Form Type: Payee: Amount Requested:	Immediate Needs Funding (INF) Any Texas Town 5 50,000.00 Project Eligible Obligated \$200,707.64. I	Federal Obligated \$215,000.23	
d	Comments:	Enter justification for Advance of Fu Provide a description of the advance to I		]
es & Comments		Add Note	No Uploaded Documents	Add Doo

 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.

9999 Public Assistance Test Gr > Any	Texas Town > Account for 9999 (PA) - Any Te	Project #74 - EXP Asbestor Ab Advance of Funds Request
Project #74: Adva	ance Item #15	
2	1	
Back to Advance of Funds Requ	est 🔚 Save 📑 New Advance It	tem 📑 Copy Advance Item More
Ţ Form >	Form	
Notes	Туре:	Regular 👻
Documents	Payee:	Any Texas Town
8 History	Amount Requested:	\$ 50,000.00
	Comments:	Enter justification for Advance of Funds Request.
		* 2
		Provide a description of the advance to help justify the request.

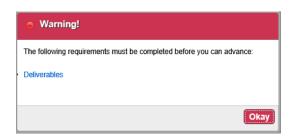
7. At this screen, you can enter a *"New Advance Item,"* or *"Delete"* the request if you made an error. The request is still in draft form.

International fact fame       Any Trace Town       Account for 0000 (PA) - Any Trace       Image: PAY - EDP Advectory							
👌 Submit 🛛 📅 Delete		New Ac	Ivance Item				More
Summary	Summary O Items						
Items	Quick Search: 1 results • Y					• \	8 8
-		<del>•</del> #	Туре	Payee	Amount	Eligibl	le Amt
Notes		2	Regular	Any Texas Town	\$50,000.00	\$0.00	

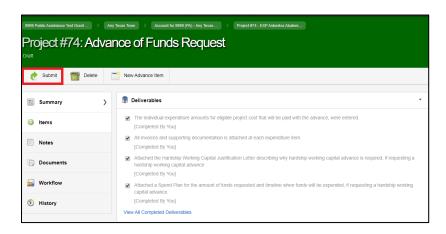
- 8. After you have saved the form, click the *"Summary"* tab on the left side menu to view the **Deliverables.** Verify that you have completed <u>all</u> deliverables by clicking on the box next to the **Deliverable**. This will place a check mark in the box to indicate that you completed that specific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

9999 Public Assistance Test Grant > Any Texas Town > Account for 9999 (PA) - Any Texas > Project #74 - EXP Asbestos Abatem							
Project #74: Advance of Funds Request							
Draft							
🕐 Submit 📅 Delete 📋	New Advance Item						
📰 Summary 💦 👌	Deliverables						
§ Items	The individual expenditure amounts for eligible project cost that will be paid with the advance, were entered.						
Notes	<ul> <li>All invoices and supporting documentation is attached at each expenditure item.</li> <li>Attached the Hardship Working Capital Justification Letter describing why hardship working capital advance is required, if requesting a hardship working capital advance</li> </ul>						
Documents	Attached a Spend Plan for the amount of funds requested and timeline when funds will be expended, if requesting a hardship working capital advance.						
🙀 Workflow	View All Completed Deliverables						

 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**.



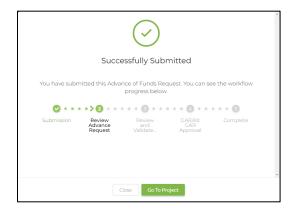
10.Click the *"Submit"* button when all of the **Deliverables** have been completed.



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

Before Submitting below.	g this Advance of Funds Request please fill out the necessary information	
	Leave a note:	

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.

6000 Public Assistance Text Grant (PA) > Any Tozan Tourn > Ansourt for 6000 (PA) : Any Tozan Tourn							
Proiect #74 - EXP	Project #74 - EXP Asbestos Abatement and E (L, Cat B)						
Open				_			
Create New Request				More •			
Summary >	Project Details		•	🧇 Grant 🔹			
Funding	Number:	F# 74		9999 Public Assistance Test Grant Public Assistance			
	Title:	EXP Asbestos Abatement and E		Declared: January 18, 2017 Emergency Deadline: July 18, 2021			
Expenses	Type:	B - Emergency Protective Measures		Permanent Deadline: January 18, 2023			
Payments	Reference Number:	EXP3350					
Progress Monitoring	Eligible Obligated:	\$135,853.46 (L)	Expand	Applicant •			
Progress monitoring	Federal Obligated:	\$135,853.46 (100.00%)	Expand	Any Texas Town Sherman County (5 - Northwest Texas			
Contacts	State Obligated:	\$0.00 (0.00%)		Region Region) EIPS# 000-TEST0-00			
Notes	Local Share:	\$0.00 (0.00%)		State #: 90052 FEIN #: 111111111 Vendor #:			
E notes	Advances Requested:	\$0.00	Expand	DUNS #: 111222333 Type: City			
Documents	Work Complete %:	25.00% Quarterly Report 2018 Q3: Apr-Jun is 25.00% complete.		Physical/Mailing: 1 Longhorn Drive Sherman, TX.			
S History		Project Version 0 is 50.00% complete.		Sherman, TX,			
	Work Deadline:	January 18, 2020 (override) Due in 295 days					
	In Process Requests:	Quarterly Report (1) Time Extension (1)	Expand Expand				

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.

0000 Public Assistance Text Grant (PA) > Any Texas Town > Account for 0000 (PA)-Any Texas Town										
Project #7/1 - EXP Ashestos Abatement and E (L. Cat R)										
Open										
📷 Create Expense 📑 C	eate New R	lequest								More •
Summary Expenses										
Funding	Quick	Search:						0 results	• 🕎	8 8
	- #	Туре	Contractor	R	Reference #	Amount	Eligible A	RFR #	Workfl	ow Step
Expenses										
👸 Payments					No Results					

- 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.

Create 🥼	Cancel			
▲ 0.000 (N	Cancer			
📱 ¥ Form	>	Form		
d		Туре: а	Select One	
		Amount Requested:	S 0.00 Project Eligible Obligated \$135,853.46, Federal Obligated \$135,853.46, Expended \$0.00	
			<ul> <li>repres argume designed e recidents () i danse designed e recidents (), anjened ester</li> </ul>	
		Comments:	A	
		c	<b>→</b>	
			-	
				e
es & Comments			Add Note No Uploaded Documents	Add Docu

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.

		VISION OF EMERGENCY N ACT WORK SUMMAR				Page	1	of	1
I. APPLICANT		2. PA ID	3. PW#			4. DISAST	ER NUMBER		
Any Texas Town		000-TEST0-00	10			9999			
5. LOCATION/SITE			<ol><li>CATEGORY</li></ol>			7. PERIOD			
Any County			F			12-29-17 to 1	-16-18		
Repaired and repl rash	IN OF WORK PERFORMED aced damaged X arms and Utility F	oles. Pulled the utility truck		Load haul	and dispose of dam	naged poles, r	all wire on pol	es and clear	up misc.
DATES WORKED	CONTRAC	TOR	BILLING/INVOICE		MOUNT		COMMENT	S-SCOPE	
12-29-2017 to 1- 16-2018	Joe Contractor		43762	\$	415,260.88	See attache	d invoices wit	h back up	
1-7-18 to 1-15- 18	Jim Contractor		43697	\$	12,420.00	See attache	d invoices wit	h back up	
1-3-18 to 1-7-18	J & M Contracting		44057	ş	7,950.00	105 poles @	75.00/pole		
to			_	ş					
to				s					
to				s					
to				ş					
10				\$					
to				s					
to				s					
		GRAND TOTAL		\$	435,630.88				
I CERTIF	Y THAT THE ABOVE INFORMAT	ION WAS OBTAINED FRO	M PAYROLL RECORDS, IN	VOICES, OF	OTHER DOCUME	ENTS THAT A	RE AVAILAE	LE FOR AU	IDIT.
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 <u>not</u> 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

Create New Expe	nse	
Create Cancel		
Form >	Form	
	Type: Vendor/Contractor: Invoice Number: Invoice Date: Amount Requested:	Contract Work Summary  Type to Search  S 0.00 Project Eligible Obligated \$286,797.64, Federal Obligated \$215,098.23, Expended \$0.00
	Comments:	

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

Create New Expense

Create Cancel		
Form >	Form	
	Type: Document Number: Effective Dates: Amount Requested:	Force Account Labor         v           Io         Io           S         0.00           Project Eligible Obligated \$286,797.64, Federal Obligated \$215,098.23, Expended \$0.00
	Comments;	

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.



Create New	Expense	9	
Create 🕼 🤇	Cancel		
🛐 Form	>	Form	
		Type: Document Number: Effective Dates: Amount Requested:	Force Account Equipment         •           Image: state
		Equipment Type: Comments:	

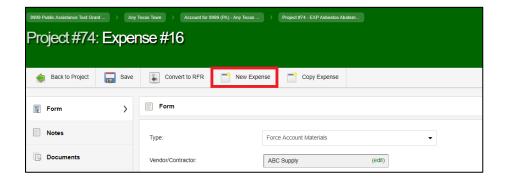
FAE and FAE DAC - enter the date range the Summary Record covers, enter the Grand Total from the Summary Record into **"Amount Requested,"** and any pertinent comments.

	Figure 4						
Create New	xpense						
Create 🕼	el						
🛐 Form	> Form						
	Force Account Materials						
	Type: Force Account Materials Vendor/Contractor. Type to Search						
	Invoice Date:						
	Amount Requested: \$ 0.00						
	Project Eligible Obligated \$286,797 64, Federal Obligated \$215	,098.23, Expended \$0.00					
	Material Description:						
	Comments:						

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."* 

$\begin{array}{l} \mbox{sequence} \\ \mbox{sequence} \\ \mbox{Project \#15 - Test (L} \\ \mbox{open} \end{array}$		r 9999 (PA) - Any Texas Coun		<b>N</b> I NO	
Create New Request				More	
Summary >	Project Details			🧇 Grant 🔹	
Funding	Number:	F# 15		9999 Public Assistance Test Grant Public Assistance	
Expenses	Title:	Test E - Public Buildings & Equipment		Declared: August 25, 2017 Emergency Deadline: February 25, 201 Permanent Deadline: February 25, 2019	
	Type:				
👸 Payments	Reference Number:	Test		Applicant -	
31 Progress Monitoring	Eligible Obligated:	\$143,368.84 (L)	Expand		
in rogress monitoring	Federal Obligated:	\$107,526.63 (75.00%)	Expand	Any Texas County Sherman County (5 - Northwest Texas	
Contacts	State Obligated:	\$0.00 (0.00%)		Region Region) FIPS #: 111-TEST0-00	
Notes	Local Share:	\$35,842.21 (25.00%)		State #: 93064 FEIN #: 000000000 Vendor #:	
	Advances Requested:	\$0.00	Expand	DUNS #: 333222111 Type: County	
Documents	Work Complete %:	98.00%		Physical/Mailing: 2 County Rd 1 Sherman, TX,	
1 History		Quarterly Report is 0.00% complete. Project Version 0 is 98.00% complete.			
	Work Deadline:	February 25, 2019 Overdue by 231 days			
	In Process Requests:	Quarterly Report (1)	Expand		

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

9999 Public Assistance Test Grant (PA) >> Any Texas County >> Account for 9999 (PA) - Any Texas Coun.											
Project #15 - Test (L, Cat E)											
See Create Expense Create New Request More •											
Summary			Expenses								
Funding		Quick	Search:					2 results	• 🍸 🔊 📇		
		- #	Туре	Contractor	Reference #	Amount	Eligible A	RFR #	Workflow Step		
Expenses	>	5	Contract W	ABC Consulting	123	\$500.00	\$0.00	Draft	1) Submission		
👸 Payments		6	Debris Re	Vendor 123	987	\$1,000.00	\$0.00				
						\$1,500.00	\$0.00				

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

9999 Pathe Assistance Test Guart Any Trava County Account for 9999 (PAU-Any Texas > Project #5.5-Test (S, Cat E) Project #15: Expense #5								
Back to Project 🔚 Sa	ve 👔 Convert to RFR 📄 New Ex	pense 📑 Copy Expense						
Form >	Form							
Notes	Туре:	Contract Work Summary						
Documents	Vendor/Contractor:	ABC Consulting (edit) 123						
③ History	Invoice Number:							
	Invoice Date:	Feb 1, 2019						
	Amount Requested:	\$ 500.00						
	Comments:	Enter Comments						

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.

<ul> <li>Convert to an RFR</li> </ul>	
Are you sure you want to convert this expense to an RFR?	
Yes Can	cel

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.

1999 Puez Annelesen Tent Canel () Any Tenas Courty () Account for 1990 (PA) - Any Tenas () Project #15 - Tent 1. Cares Project #15: Reimbursement Request Dot							
🕐 Submit 🛛 📷 Delete	Expense Options •			More +			
	New Expense						
Summary	Link Existing						
Expenses	Move Expenses			7 🗿 🔒			
-	Conv Evenances	tor	Reference #	Amount			
Notes	Copy Expenses	nsulting	123	\$500.00			
Documents							

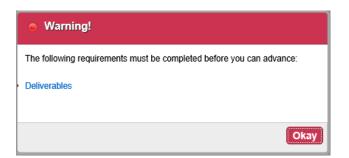
6. Select all expenses associated with the current Reimbursement Request (RFR) (the Ctrl key allows selection of multiple expenses). Once all expenses to be converted to the Reimbursement Request have been selected, click the "Link" button.

Link an Existing Expense	
6. Debris Removal (\$1,000.00)	A
	• •
	Link Cancel

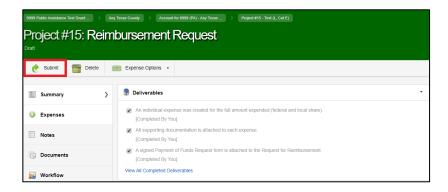
- Click the "Summary" tab on the left side menu to view the Deliverables. Verify that you have completed <u>all</u> deliverables by clicking on the box next to the Deliverable. This will place a check mark in the box to indicate that you completed that specific deliverable.
  - *Note:* Each *Deliverable* must be checked off/completed before the form can be submitted.

Project #15: R	leimbursement Request	eon	
🥐 Submit 📷 Dele	te m Expense Options •	More	
Summary	> Beliverables -	🧇 Grant	
Expenses	An individual expense was created for the full amount expended (federal and local share).     [Complete by Yval]     All supporting documentation is attached to each expense.     All supporting documentation is attached to be Request for Reinbursement.	9999 Public Assistance Test Grant Public Assistance Declared: August 25, 2017 Emergency Deadline: February 25, 20 Permanent Deadline: February 25, 20	
Documents	View All Completed Deliverables	Applicant	
Workflow	Reimbursement Request Details	Any Texas County Sherman County (5 - Northwest Texas	
S History	This form requests funding from the State on a given project. Please attach copies of invoices, recepts, checks or payroil documents to support the requested amount for reimbursement.	Region Region) FIPS #: 111-TEST0-00 State #: 93064 FEIN #: 000000000 Vendor #:	
	Expense Count: 2	DUNS #: 333222111 Type: County	
	Total Requested: \$1,500.00	Physical/Mailing: 2 County Rd 1 Sherman, TX,	
	Total Eligible Later: \$0.00		
	Total ineligible: \$0.00	A Project	

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**.



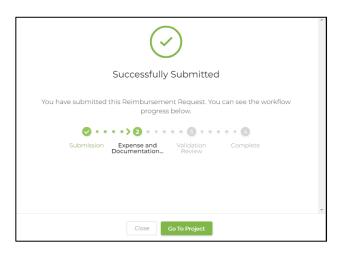
9. Click the *"Submit"* button when all of the **Deliverables** have been completed.



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

Submit this Reimbursement Request						
Before Submitting this Reimbursement Request please fill out the necessary information below.						
	Leave a note:					
		÷				
Cancel	Submit					

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



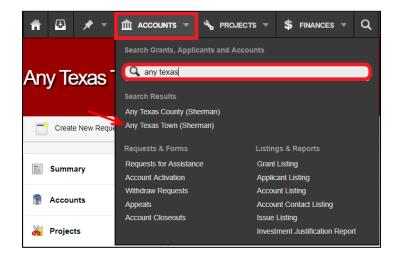
**Note:** If you made an error and need to unlink or delete an expense, submit a Support Ticket.

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

 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.

Any Texas Town	C Submit New Reimbursement Re	ned		ecoary More
		Annua -		more -
Summary	> Applicant Details		•	Apply for a Grant *
Accounts	Unique Applicant ID:	2501		There are currently 12 Grants open. If you wish to apply, please click the Apply Now
🔏 Projects	FEIN #:	11111111		button below.
	DUNS #:	111222333		Apply Now
Payments	Account Count:	2 Accounts Open		
II Quarterly Reports	Project Count:	8 Projects 6 Unobligated 2 Obligated - Large (All Open)		
Contacts	Quarterly Report Count:	No Active QRs (View All) 1 Overdue Quarterly Report		
Notes	Eligible Obligated:	\$377.781.90		
Documents	Federal Obligated:	\$990,781.78 (262.26%) View Graph		
③ History	State Obligated:	\$24,192.84 (6.40%) View Graph		
	Local Share:	\$36,289.27 (-168.66%)		

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

ny Texas Town										READ OF
Create New Request	Submit	New Reimb	oursement R	equest						More
🖺 Summary 😂 Payments » Payables										
Accounts	Quit	ck Search:							0 results 🔹 🍸	8
Accounts		• Pr	Grant #	Pay #	Proj #	Fed Amt	AY	Approved	Workflow Step	Days
Projects	Г	PA	4332	1	464	\$492,563.51	2019	Feb 5, 2019	7) Complete	52
Payments >										
<ul> <li>Payables</li> </ul>										
Receivables										
Payables & Receivables										
Payments by Transaction										
Ready to Pay										
Advance of Funds Requests										
Reimbursement Requests										
Expenses										

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

COOR Scores Starm (PA) > Any Texas Town > And Project #464: Paya Routing Complete		en fødd - Cull Basse pelez			
					More -
Summary >	🗐 Details			•	🦻 Grant 🔹
Transactions     Advanced Edit	Total Funds:         \$492,553.51           Federal Funds:         \$492,553.51 Voccher #: 94698203 (Feb 4, 2019) Payment #: 3895547 (Feb 4, 2019)           Project Count:         1 Project				9999 Public Assistance Test Grant Public Assistance Declared: January 18, 2017 Emergency Deadline: July 18, 2021 Permanent Deadline: January 18, 2023
Notes					Applicant -
Documents	Payment Batch:	Payment Batch #020.			Any Texas Town
😡 Workflow	Workflow Summary •				Sherman County (5 - Northwest Texas Region Region) FIPS #: 000-TEST0-00
③ History	Current Step:	7) Complete Extended Description: Complete, Funds have been paid to subrecipient.			State #: 90052 FEIN #: 111111111 Vendor #: DUNS #: 111222333 Type: City
	Last Advanced:	Feb 5, 2019 at 8:09 AM by System Admin	52 days ago		Physical/Mailing: 1 Longhorn Drive Sherman, TX,
	Submission:	Jan 31, 2019 at 10:04 AM by System Admin	57 days ago		
					Project •
					F #464 Cat B issues performed during Hurrcane harvey B Emergency Protective Measures Work Deadine: February 25, 2018 Eliphies 4920258351 (L) Federal: \$492,563,51 (100%) Un-Expended Eligible: \$0.00

# **Quarterly Reports**

 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.

Ĥ	🗗 🖈 🕆 🏛	Z ACCOUN	ts 🥆 🔧 projects 🕚	r \$ finances ▼ Q		Maria Sal	azar logged in as User 1 Test 🔺 (LOBOUT) 💡
An	y Texas Co	ounty					RADONY
	Create New Request		ubmit New Reimbursement Re	quest			More •
Ĩ	Summary	>	Applicant Details			•	Apply for a Grant *
	Accounts		Unique Applicant ID:	4116			There are currently <b>15</b> Grants open. If you wish to apply, please click the Apply Now
*	Projects		FEIN #:	000000000			button below.
_			DUNS #:	333222111			Apply Now
1	Payments		Account Count:	1 Account Open			
31	Quarterly Reports		Project Count:	5 Projects 5 Obligated - Large (All Open) 6 5 overdue (view)			
	Contacts		Quarterly Report	No Active QRs (View All)	1		
	Notes		Count:	1 Overdue Quarterly Report			
Ē	Documents		Eligible Obligated:	\$770,243.49			
	History		Federal Obligated:	\$673,481.99 (87.44%) View Graph			
0	TISTOLY		State Obligated:	\$0.00 (0.00%)			
			Local Share:	\$96,761.50 (12.56%)			

 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."

Any Texas Cou	inty	1								READ-CINLY
Create New Request	<u>600</u> S	Submit N	lew Reimburs	ement Reques	t					More •
Summary	Summary Guarterly Reports									
Accounts		Quick	Search:						1 results 🔹 🍸	8 8
			Program	▼ Grant #	Period	Proj Count	Proj F#	Submitted	Workflow Step	Days
Hrojects			PA	9999	FFY2019 Q1: Oct 2018 - Dec 2018	5	multiple		1) Report Submission	283
is Payments										
Quarterly Reports	>									

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

FFY2019 Q1: Oct Routing in Progress: Report Submission (Ste		LOTING
🥐 Submit		More -
Summary >	Deliverables	🧇 Grant 🔹
Projects	Entered the status of each project listed in the Quarterly Report.     A Time Extension Request is in process for each project with an estimated completion date greater than the project work deadline.     A Scope/Cost Modification Request is in process for each project whose scope will deviate from the original scope or cost.     A Project Closeout Request is in process for each project 100% complete.	9999 Public Assistance Test Grant Public Assistance Declared: August 25, 2017 Emergency Deadline: February 25, 2018 Permanent Deadline: February 25, 2019
Notes	The Submission Consent box was selected at the bottom of each project status page.	Applicant -
Documents	View All Completed Deliverables	Any Texas County Sherman County (5 - Northwest Texas
Workflow	Quarterly Report Details	Region Region) FIPS #: 111-TEST0-00 State #: 93064 FEIN #: 000000000
History	This form is to report the progress of projects on a quarterly basis. The quarter end dates are December 31, March 31, June 30, September 30 and this form is due within 15 days of each end date.	Vendor #: DUNS #: 333222111 Type: County Physical/Mailing: 2 County Rd 1
	Period: 2019 Q1 (Oct 1, 2018 - Dec 31, 2018)	Sherman, TX,
	Project Count: 5	
	Viewed Count: 4 Projects (80.0%)	
	100% Complete Count: 0 Projects (0.0%)	
	Fully Closed Count: 0 Projects (0.0%)	

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

WH Natic Leaders Not Care 790 1         My Natic Care Care 791 1         My Natic Care Care 791 1         My Natic Care Care 791 1         My Natic Care 791 1 <t< th=""><th></th></t<>								
🥐 Submit								More
Summary			Projects					
Projects	``	Quick Search			5 results 🔹 🍸 📓 📇			
			Proj #	• Туре	Title	% Complete	Completion D	Is Certified
🛒 ¥ Form			210	в	DR-4332-City Emergency Protective	0		
Notes			130	в	Emergency Protective Measures City Wide	0		
_			80	в	EXP Asbestos Abatement and E	0		
Documents			15	Е	Test	0		
Workflow			495	G	Harry Park Trail	0		

- 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.

General	
Current Percent Complete:	0         %           The percentage of actual work that has been completed at the end of the reporting period (not a % of funds expended).           Last Counter: 10%
Total Funds Expended to Date:	\$ The amount that has been spent on the project to date.
Anticipated Final Amount:	S Under Budget By \$143,368.84
Anticipated Completion Date:	The date you expect the work to be completed.

*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.* 

General	
Current Percent Complete:	100 % The percentage of actual work that has been completed at the end of the reporting period (not a % of funds expended).
Total Funds Expended to Date:	S The amount that has been spent on the project to date.
Actual Final Amount:	S Under Budget By \$143,368.84
Actual Completion Date:	The date you expect the work to be completed.

 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%.

Status		
Work Status:	Select One	
Project Status Comments: Cost Status:	Select One Completed On Schedule Delayed Suspended Cancelled Closed Other (please specify)	
Comments:	(P)	*
	Please provide any important information regarding the progress of this proje	ct

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

Project Status Comments:	*
	1

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

Status		
Work Status:	Select One	<b>v</b>
Cost Status:	Select One Cost Unchanged	
Comments:	Cost Overrun Cost Underrun Other (please specify)	

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

Status		
Work Status:	Select One	
Cost Status:	Select One	
Comments:		~
		$\sim$
	0 OF 8000 CHARACTERS USED	
	Please provide any important 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.

9999 Public Assistance Test Grant (PA) FFY2019 Q1: Routing in Progress. Report Subr	Oct	2018 - Dec	artho 9999 (94). Any Tenan Count. : 2018	EDTING
🔚 Save 🥐 Subm	it			More ·
Summary		Form		
Projects		Previous Project	4 of 5 - #210 DR-4332-City Emergency Protective   Large Project Filter: ○ +100% Complete ○ 100% Complete	Next Project
🛒 Form	>		You've made changes to this form. To accept the changes, you must click the save button.	<b></b>
Notes		F #210 - DR-4 Category:	1332-City Emergency Protective (View Project) B Emergency Protective Measures	Last Viewed By: User 1 Test ( Oct 24, 2019 )
Documents		Eligible Amount:	S169,066.87	Last viewed by. Oser T Test ( Oct 24, 2019 )
Workflow		Work Deadline:	February 25, 2018	

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."* 

Are you sure?	
Are you sure you want to save all these changes?	
	Save Cancel

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.

WM Plake Analysis Terr Clearly         2 Analysis Terr Clearly         2 Analysis Terr Clearly         2 Analysis Terr Clearly         2 Analysis         2 An								
🔚 Save 🅐 Submit			More -					
Summary	Form							
Projects	Previous Project	4 of 5 - #210 DR-4332-City Emergency Protective Large Project Filter: ○ < 100% Complete ○ 100% Complete	Next Project					
Form >		You've made changes to this form. To accept the changes, you must click the save button.						
Notes	F #210 - DR-4	1332-City Emergency Protective (view Project) B Emergency Protective Measures	Last Viewed By: User 1 Test ( Oct 24, 2019 )					
Documents	Eligible Amount:	\$169.066.87	Last viewed by: One Price (Oct 24, 2015)					
Workflow	Work Deadline:	February 25, 2018						

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 <i>deadline," even though you will not be completing a Time Extension Request.* 

Routing in Progress: Report Submi	Any Texas County     Account for 9999 (PA) - Any Texas Coun  Oct 2018 - Dec 2018  ssion (Step 1 of 4)
C Submit	
Summary	> Beliverables -
Projects	Entered the status of each project listed in the Quarterly Report.     A Time Extension Request is in process for each project with an estimated completion date greater than the project work deadline.
🛒 Form	A Scope/Cost Modification Request is in process for each project whose scope will deviate from the original scope or cost.
Notes	A Project Closeout Request is in process for each project 100% complete.     The Submission Consent box was selected at the bottom of each project status page.
Documents	View All Completed Deliverables
🙀 Workflow	Quarterly Report Details -
1 History	This form is to report the progress of projects on a quarterly basis. The quarter end dates are December 31, March 31, June 30, September 30 and this form is due within 15 days of each end date.

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

9999 Public Assistance Test Grant (PA) FFY2019 Q1: C Routing in Progress: Report Submissi	Oct 2018 - Dec 2018
👌 Submit	
Summary	> Beliverables -
Projects	<ul> <li>Entered the status of each project listed in the Quarterly Report.</li> <li>[Completed By You]</li> </ul>
🛒 Form	A Time Extension Request is in process for each project with an estimated completion date greater than the project work deadline. [Completed By You]
Notes	A Scope/Cost Modification Request is in process for each project whose scope will deviate from the original scope or cost. [Completed By You]
Documents	<ul> <li>A Project Closeout Request is in process for each project 100% complete.</li> <li>[Completed By You]</li> </ul>
😡 Workflow	The Submission Consent box was selected at the bottom of each project status page. [Completed By You]
🕥 History	View All Completed Deliverables

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

Submit this	Quarterly Report	
Before Submitting	this Quarterly Report please fill out the necessary information below.	<b></b>
	Leave a note:	
		Ŧ
Cancel	Submit	

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

Successfully Submitted	*
You have submitted this Quarterly Report. You can see the workflow progress below.	
Close Go To Account	4