Louisiana Community and Technical College System (LCTCS)

eGrants Applicant/Grantee User Guide

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GUIDE LEGEND

Symbol	Description
	Highlights an important part in a figure, referenced in the text.
	Indicates an alert for the user to be aware of.
	An important reference or reminder for the user.
	Arrow points to a key part in a figure.

1 APPLICANT / GRANTEE USER REGISTRATION
Registration Process

This section contains a step-by-step guide for the Grantee on how to submit a request for an account with the Louisiana's Community and Technical Colleges Systems (LCTCS) eGrants Applicant Portal and how to set login credentials once the account has been approved.

1.1 Accessing the Applicant Portal
Applicable to: Primary and Secondary applicant

In order to access the LCTCS eGrants Applicant Portal, the user should enter the following URL in to a supported web browser: lctcs-egms.force.com .

> **The LCTCS Portal is supported by the following browser versions:**
> - Microsoft ® Internet Explorer ® Version 11
> - Mozilla ® Firefox ® version 35 & above (Most recent and stable version recommended)
> - Google Chrome ™ version 30 & above (Most recent and stable version recommended)

There are two blocks available (Fig. 1); the left panel [1] contains **Useful Links** set up by LCTCS for the user to refer to at any time, and the right [2] contains a button where the user can register for a new account along with fields to login as an existing user.

Figure 1: LCTCS Login Screen

1.2 Registering as a New User
Applicable to: Primary and Secondary applicant

Once the LCTCS Applicant Portal has been accessed, the user can register for an account. To begin, click on the **Register** button, as highlighted in Figure 2.

⚠ <u>DO NOT</u> wait until the last minute to register before the application deadline. Registration approval may take <u>up to 2 weeks</u>.

Figure 2: Registering as a New User

1. Next, review the **Applicant Non-Disclosure Agreement** (Fig. 3). Click **Agree** to proceed. If the user chooses to **Disagree**, they will not be able to continue with the registration process.

Figure 3: Non-Disclosure Agreement

2. To search for an organization, enter the **EIN** and **DUNS** numbers for your organization and click on the **Search** button, as highlighted in Figure 4.

- The EIN number is a nine-digit number, and should be entered without any spaces or commas;
- The DUNS number is a nine _or_ thirteen-digit number, and should be entered without any spaces or commas.
- If the user is applying for Perkins funds, make sure the **Program Type** is selected as **Perkins**.

> Fields marked with an asterisk (*****) indicate that the field entry is required.

Figure 4: Organization Search

Entering a valid EIN/DUNS number combination will result in the respective organization being populated in the search results (Fig. 5). Click on the **Continue to Register** button to proceed.

Figure 5: Organization Search Results

3. In the next screen, the user will be required to complete basic applicant information (Fig. 6). In the **Role** field, the user may select their role as either a *Primary* or *Secondary* user, depending on the specifications of their respective organization. Both Primary and Secondary users can access and edit information in the eGrants Portal but *only* the Primary user can submit applications and other required forms/information requested by LCTCS.

> If you have any questions regarding any of the fields, hover your mouse over the blue question bubble to view a brief description.

Figure 6: Applicant Profile Screen

> The email address must be valid in order to receive access to the account. The username can be anything as long as it is in the "email" format (i.e. name@email.com).

4. Before proceeding, the user must complete the CAPTCHA (**C**ompletely **A**utomated **P**ublic **T**uring test to tell **C**omputers and **H**umans **A**part) field, indicated with the red box in Figure 6. The CAPTCHA test is a safety feature which allows the system to determine whether the user is a human or computer. This feature prevents spam and wrongful access in to the system. If there is difficulty reading the test in the CAPTCHA box, click the "Get New Challenge" button or the audio button to hear the displayed text. Click **Next** to continue.

5. If all the information has been entered in correctly, the user will be prompted with a confirmation screen (Fig. 7). The registration process is now complete. Upon approval from LCTCS, the Applicant will receive instructions on setting login credentials.
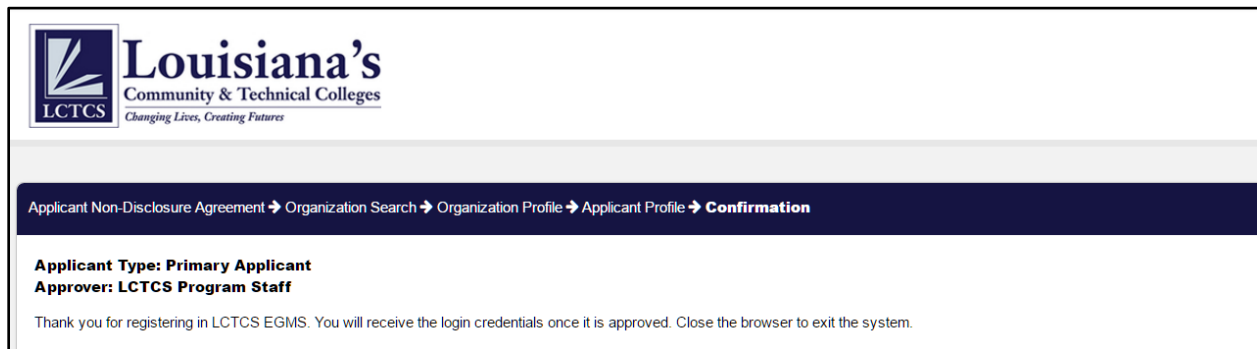
Figure 7: Confirmation Screen

1.3 Activating an Approved Account
Applicable to: Primary and Secondary Applicant

This section will explain the process of activating the Primary or Secondary Applicant account, once an approval message has been received.

1. Once the account has been approved by LCTCS, the applicant will receive the following email of approval and a link to set login credentials (Fig. 8). Click on the "here" link to begin.
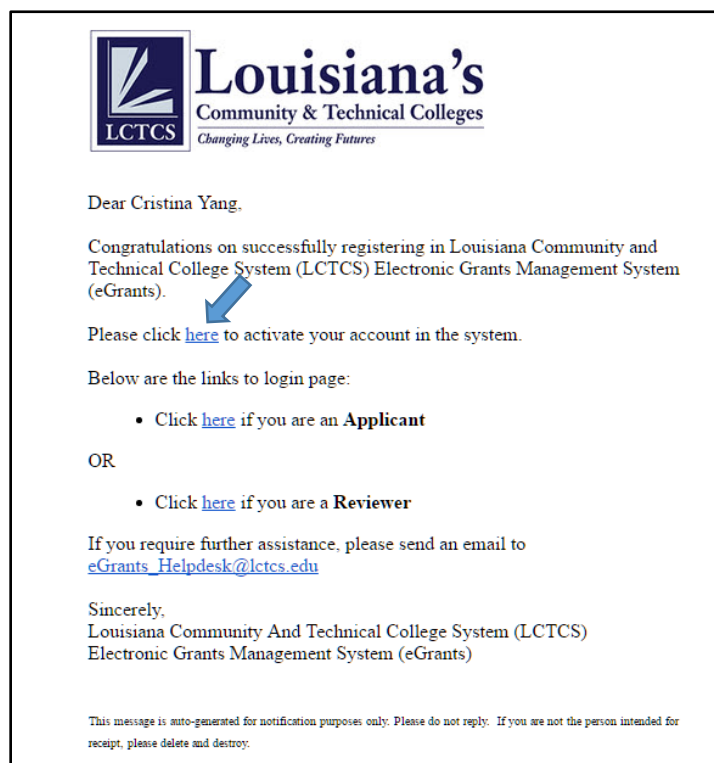
Figure 8: Account Approval Email

2. By clicking the link, the applicant will be taken to the LCTCS eGrants Portal, where the user will be asked to set their password (Fig. 9).

Figure 9: Setting Login Credentials

3. In order to set the password, it must meet the following criteria:
   a. At least 8 characters
   b. At least 1 letter
   c. At least 1 number

4. Once the chosen password has met the minimum requirements, a confirmation notice will appear in each field, as shown in Figure 10. Click **Change Password** to proceed.

Figure 10: Changing the Password

5. Clicking the **Change Password** button will automatically log the applicant in to the eGrants Portal. The registration process is now complete. The user will arrive at the **Contact View** page in the eGrants Portal (Fig. 11). Review all the entered information and click on the **Home** tab.

Figure 11: Contact View

2 HOW TO RESET PASSWORD

If at any time the user has forgotten the password or needs to be reset, the user may do so from the LCTCS eGrants login portal. In the right block, click on the **Forgot Password** link (Fig. 12).

Figure 12: Forgot Password Link

Clicking on the **Forgot Password** link will take the user to **Password Reset** screen (Fig. 13). Here, the user should enter in their username and click on the **Reset Password** button.

Figure 13: Password Reset

After clicking on the **Reset Password** button, the user will be prompted with a confirmation message informing them that their request for a password reset has been received (Fig. 14).
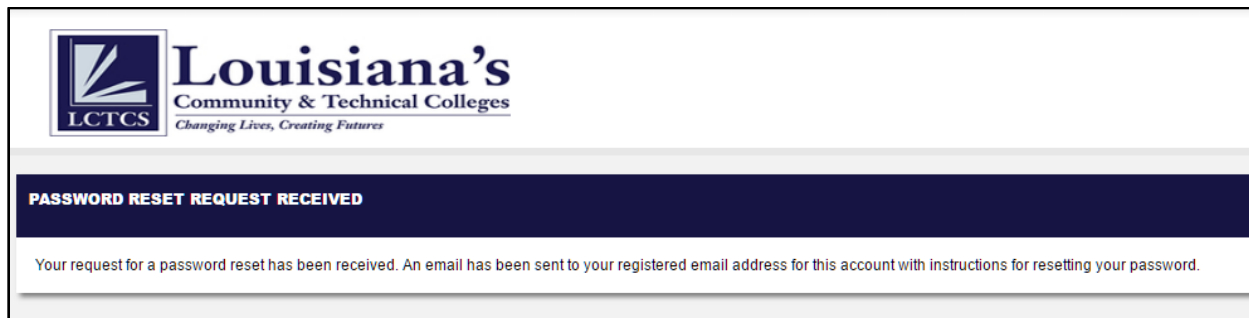
Figure 14: Password Reset Request Received

The user will then receive an email with instructions on how to reset the password (Fig. 15). Click on the hyperlink to proceed.
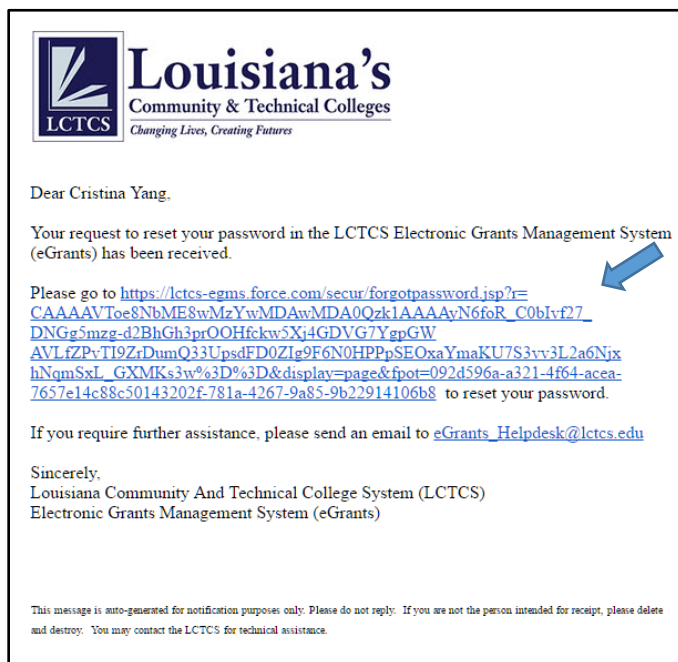
Figure 15: Reset Password Email

The user will be taken to the eGrants Portal, where they can set their password once again (Fig. 16). *The user may not use a password that has been previously used*. Enter in a password and click **Change Password** to complete the password reset/recovery process.
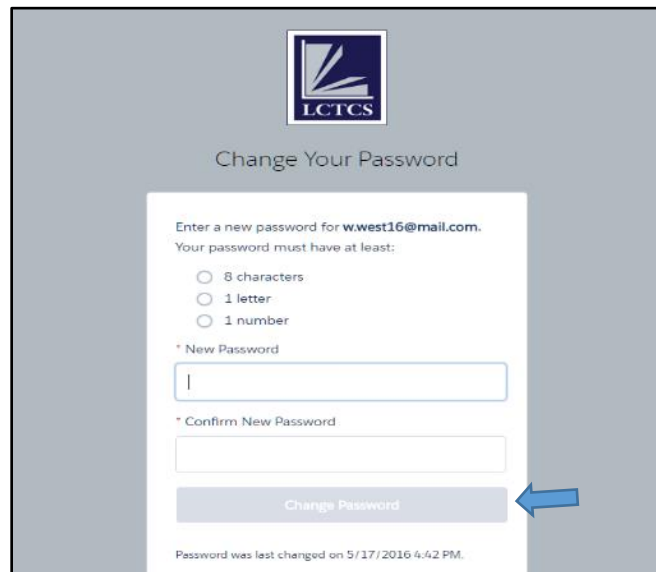
Figure 16: Change Your Password

3 SUBMITTING AN APPLICATION

To begin with the application submission process, access the external LCTCS eGrants portal.
Enter the following URL in to a supported browser: lctcs-egms.force.com .

Both the Primary and Secondary users may log in and access the FO. The user will also receive an
email notification (Fig. 17) inviting them to apply for the Funding Opportunity. Click on the
"here" link to proceed.
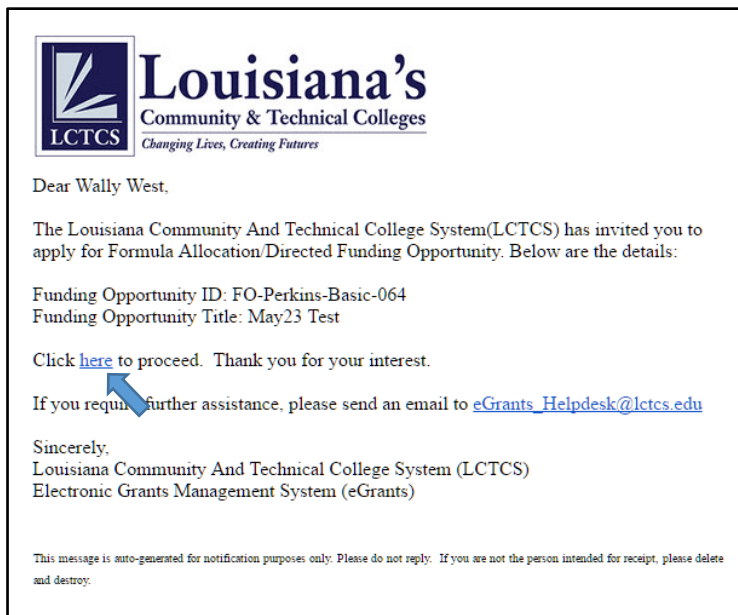
Figure 17: FO Invitation Notification

Next, the information for the Funding Opportunity will be displayed on the LCTCS eGrants Portal
(Fig. 18). If the user decides to proceed with applying for the FO, click on the **Create Application**
button.
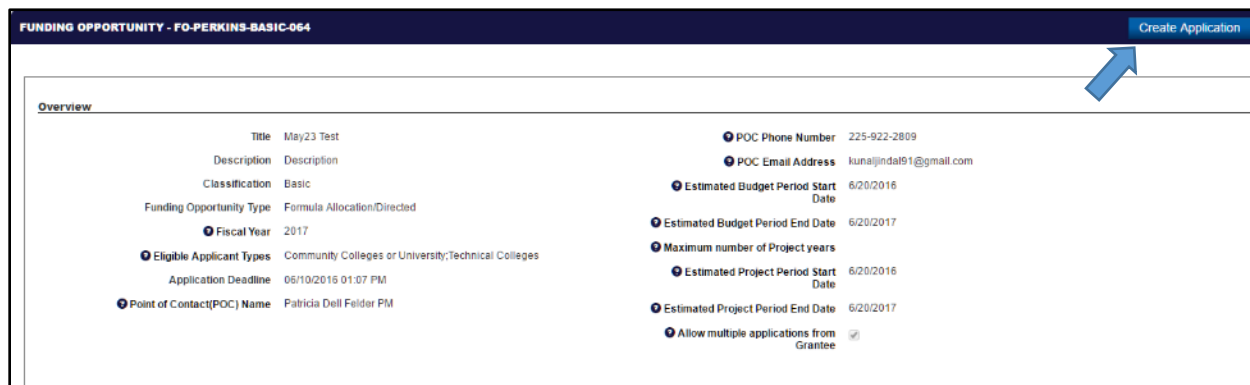
Figure 18: Funding Opportunity Information

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Clicking the **Create Application** button will begin the application process. In the **Application Edit** screen, the first tab is the **Grant Narrative** tab. This tab contains eleven question in which the user will describe their proposal for applying for the FO and how they plan to use the funds (Fig. 19). The questions will vary based on whether a Basic and CCTC FO has been selected. Complete all the required fields. **Note: Click on the Save button before proceeding to on another tab – otherwise all data entry will be lost.**

Figure 19: Grant Narrative tab

The **Performance Evaluation** tab contains several indicators that measure the level of performance (Fig. 20). If the performance level for any indicator is **below 90%**, the user will need to attach an improvement plan. To edit an indicator, click on **Edit** icon next to the **Core Indicator of Performance** and complete all the editable fields.

Figure 20: Performance Evaluation tab

The third tab is the **Required Uses of Funds** tab (Fig. 21). Click on the **Edit** button next to each **Required Use** and indicate whether Perkins dollars were used to support the activity or other sources. Click on the **Save – Required Uses of Funds** button once complete.

Figure 21: Required Uses of Funds tab

In the **Summary Budget** tab, enter in dollar amounts for each budget category (Fig. 22). Click on the **Edit** icon to complete the fields.

Figure 22: Summary Budget tab

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Finally, the last two tabs contain **Assurances** and a **Certification**. Read through the language and click on "**I hereby assure/certify that**" to agree to the Assurance and Certification (Fig. 23). Click **Save** once complete.

Figure 23: Assurances and Certification tab

Clicking **Save** will populate a progress bar and two more tabs for the application (Fig. 24). The **Forms Template** tab will contain applicable forms (required and optional). Click on the **Download Template** icon in the **Actions** column. Complete the information in the downloaded forms.

Figure 24: Forms Template tab

The **required** and **optional** documents will vary based on the budget categories selected. Table 1 provides a brief description for each document, requirements based on a Basic of CCTC application and additional comments regarding the requirements.

Table 1

#	Attachment classification	REQUIRED for Basic	REQUIRED for CCTC	additional comments
1	Cover Sheet	Yes	Yes	**Common** to Basic and CCTC. Submitted as an attachment with official signatures
2	Program Inventory	Yes	Not Applicable for CCTC	
3	Basic Grant Budget Narrative	Yes	Not Applicable for CCTC	
4	CCTC Grant Budget Narrative	Not Applicable for Basic	Yes	
5	Partnership Summary and Attestation	Yes	Not Applicable for CCTC	
6	Partnership Summary	Yes	Not Applicable for CCTC	
7	Personnel Activity Report (PAR)	Optional	Optional	*Required if personnel are funded)*
8	Improvement Plan	Optional	Not Applicable for CCTC	*Required if any of the performance levels indicators are less than 90%*
9	Position Description	Optional	Optional	*Required if personnel are funded)*
10	Position Description Roster	Optional	Optional	*Required if personnel are funded)*
11	Travel Form	Optional	Optional	*Required if Travel is funded)*
12	Consumables	Optional	Optional	*Required if consumables are funded*
13	Non-consumables	Optional	Optional	*Required if non-consumables are funded)*
14	Property	Optional	Optional	*Required if Property is funded*

Once the user has completed all the required and optional documents, click on the **Checklist and Attachments** tab (Fig. 25). The user can attach documents in this tab and also track the requirements of the application on a **Submission Checklist**. Add the completed documents from the Forms Template tab by clicking the **Add Attachments** button. In the **Checklist** block, verify when a task has been completed by clicking the **Edit** button in the **Actions** column next to the respective tab name. Click **Save** once complete.

Figure 25: Checklist and Attachment tab

After completing the requirements and uploading all the necessary documents, click on the **Submit Application** button. The application will be sent to LCTCS and undergo a review process. The Progress bar will advance to "**Submitted**" (Fig. 26).

Figure 26: Application Submitted

4 REVISE APPLICATION

Applicable to: Primary and Secondary user

Once an application has been approved, the Program Manager (PM) will initiate a **Pre-Award Revision Request**. This request will contain a description on what areas need to be revised, modified or negotiated. Only the sections selected by the PM will be editable by the applicant. The applicant will receive an email notification and Pending Task (Fig. 27).
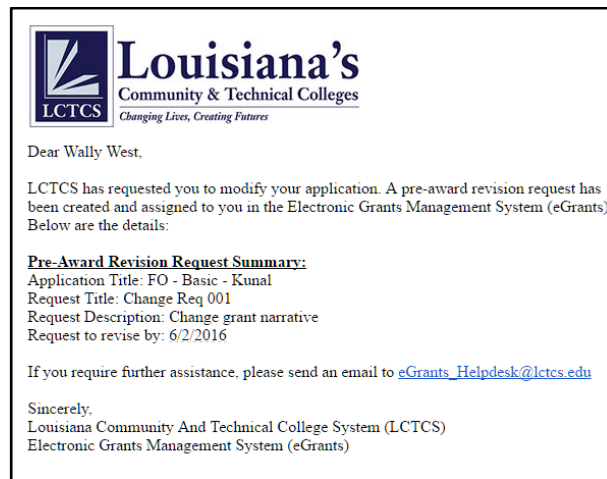
Figure 27: Pre-Award Request Email Notification

To begin, access the External LCTCS eGrants Portal. From the **Home** page, click on the **Applications** tab and click on **Pending Tasks** (Fig. 28). Click on the **Start** link in the **Actions** column for the Task Type, **Pre-Award Revision Submission Request**.
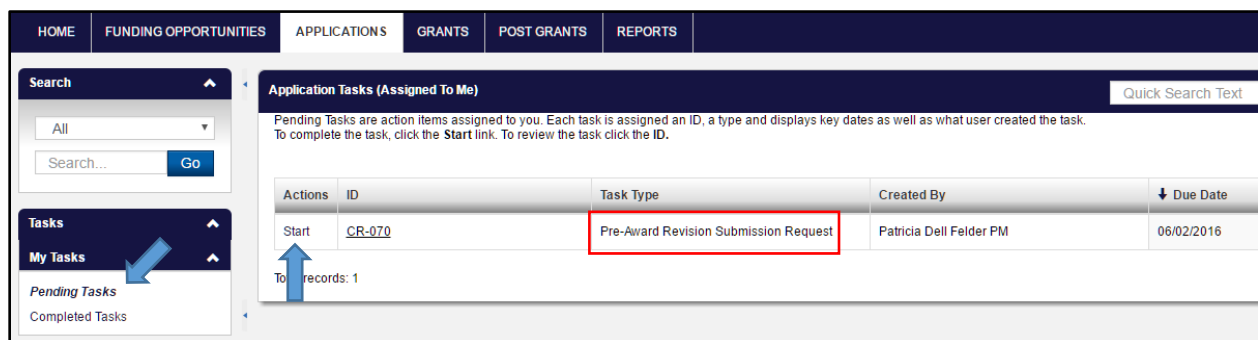
Figure 28: Pre-Award Revision Submission Request

The next screen will display information regarding the **Pre-Award Request** (Fig. 29). Review the details and click on the **Revise Application** button.

Figure 29: Pre-Award Revision Request

To begin the **Pre-Award Request**, click on the **Edit** button in the **Application View** screen (Fig. 30).

Figure 30: Application View Screen

The next screen will populate the application tabs (Fig. 31). Again, **only** the tabs selected by the PM to be revised will be editable. Make the changes/revisions to the respective sections and click **Save** once complete.

Figure 31: Application Edit screen

After all the revisions have been made, click on the **Pre-Award Revisions** tab. In the **Actions** column, click on the **Comments** icon next to the request. The Applicant will be presented with an **Applicant Response** field (Fig. 32). Enter comments pertaining to the revisions that were made. Click the **Save** button to continue.

Figure 32: Applicant Response Field

Finally, click on the **Resubmit Application** button, indicated in red in Figure 30. The **Pre-Award Request** has now been submitted. In the **Pre-Award Revisions** tab, the status will be updated to 'Submitted by Applicant' (Fig. 33).

	Applicant Profile	Grant Narrative	Performance Evaluation	Required Uses of Funds	Summary Budget	Assurances	Pre-Award Revisions

Pre-Award Revision Requests

👁 View 💬 Comments

Actions	ID	Request Title	Status	Due Date	Last Updated Date
👁	CR-070	Change Req 001	Submitted By Applicant	06/02/2016	05/25/2016 4:53:PM

Figure 33: Pre-Award Request Submitted

5 SUBMITTING A PAYMENT REQUEST

Applicable to: Primary or Secondary user

Once a grant award has been issued, the grantees can submit **Reimbursement Payment Requests**, which are based on the reporting cycle frequency set by LCTCS. The tasks will be created automatically by the eGrants System for both Primary and Secondary users on the **last day of the month**. It is expected for the payment requests to be submitted regularly, on a **monthly basis**. If a request submission is delayed/missed, the system enforces a sequential order for submission. The first one must be submitted before submitting a new one. Only one payment request can be made at a time. One request must be processed and approved by LCTCS before another can be made. *Failure to submit requests on a regular basis will delay payments*. Both the Primary and Secondary users may access and edit the task, but **only** the Primary user may submit the payment request.

To begin a payment request, access the External LCTCS eGrants Portal and log in as the Primary or Secondary user. From the **Home** page, click on the **Post Grants** tab and then, **Pending Tasks**.

In the **Actions** column, click on the **Start** link for the Task Type, **Submit Reimbursement Request** (Fig. 34).

Figure 34: Reimbursement Request

Next, the user will be taken to the **Reimbursement Request** screen (Fig. 35). Click on the **Edit** button to begin.

Figure 35: Reimbursement Request Screen

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In the **Overview** tab, scroll down to accept the **Terms and Agreement** (Fig. 36).

Figure 36: Terms and Agreement

In the **Expense Details** tab, enter in the reimbursement amount in the **Requested Expense** column for the respective budget category (Fig. 37). The requested amount *cannot* be greater than the Remaining Budget amount. Click **Save** once complete.

Figure 37: Expense Details tab

After all necessary information for the reimbursement request has been entered, click on the **Submit for Approval** button (Fig. 38).

Figure 38: Submitting Reimbursement Request

5.1 How to Initiate a Refund

If near the end of the billing period there is an award amount left over which was not used, the grantee can refund the unused money back to LCTCS.

In order to initiate a refund, enter the following URL in to a supported browser to access the External LCTCS eGrants System: lctcs-egms.force.com . The user will arrive at the LCTCS eGrants Home tab (Fig. 39).

Figure 39: LCTCS eGrants Home tab

Once logged in, click on the **Grants** tab. Click on the **Active Grants** link in the left navigation menu (Fig. 40). Select the grant for which you would like to initiate a refund and click the hyperlink in the Grant ID column.

Figure 40: Active Grants

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In the **Grant** view screen, click on the **Reimbursement Requests** tab (Fig. 41). Click on the **Initiate Refund** button to begin the process.
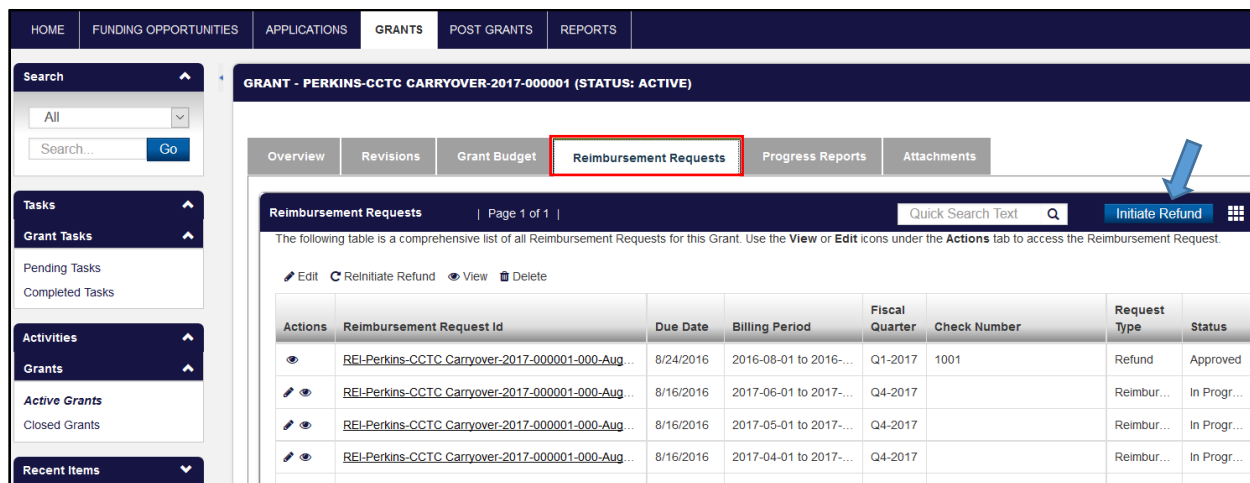
Figure 41: Reimbursement Request tab

In the next screen, the user will be presented with four tabs: **Overview**, **Expense Details**, **Attachments** and **Approval History** (Fig. 42).
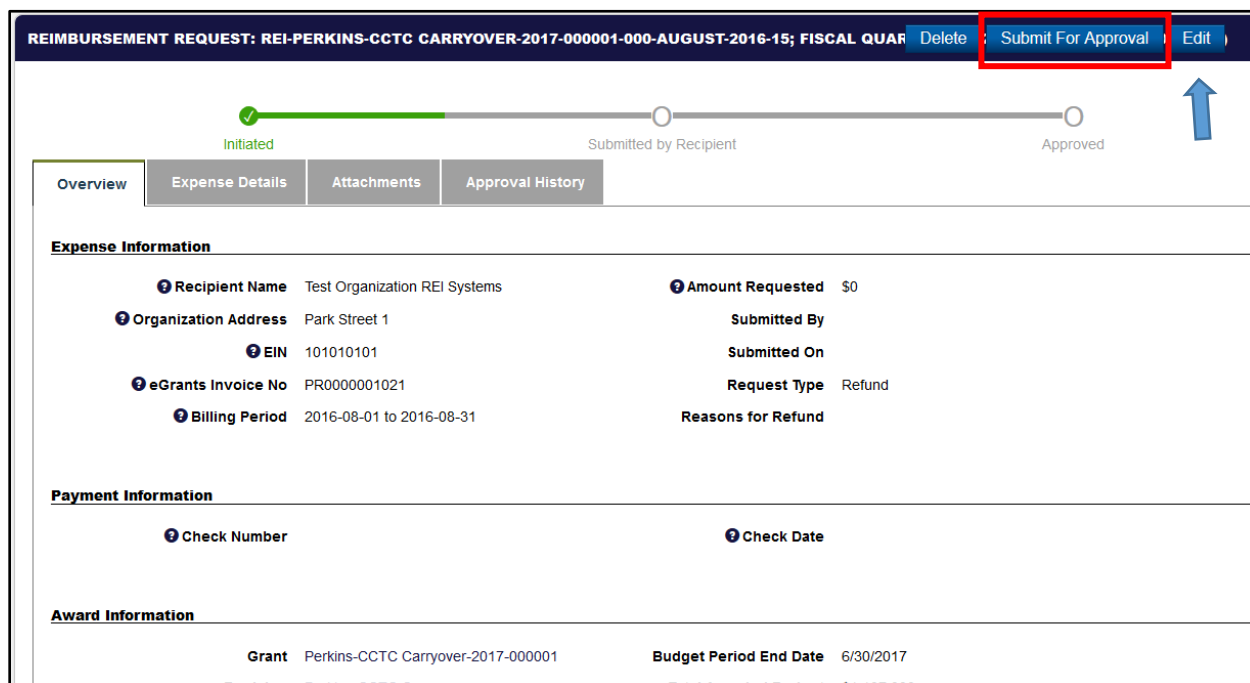
Figure 42: Reimbursement Request (Refund) Form

Click on the **Edit** button to enter a **Reason for Refund**, **Check Number**, and **Check Date** (Fig. 43). Scroll down and complete the **Terms and Agreement** block (Fig. 44).

Figure 43: Expense and Payment Information

Figure 44: Terms and Agreement Block

In the **Expense Details** tab, enter in the refund amounts for the respective **Budget Categories** (Fig. 45). Once the refund amounts have been entered, click the **Save** button to proceed.

Figure 45: Expense Details tab

The user may upload any relevant documents in the **Attachments** tab as needed. Once complete, click the **Submit for Approval** button, highlighted in red in Figure 42.

6 SUBMITTING A PROGRESS REPORT

During the Award Issuance phase, the Program Manager establishes a **Reporting Cycle** for various reports, which creates these requests based on a particular frequency.

In order to submit a **Progress Report**, navigate to the **External LCTCS eGrants Portal** by entering the following URL in to a supported browser: lctcs-egms.force.com (Fig. 46). Log in using the Grantee credentials.

Figure 46: External User Log In

Once you have logged in, click on the **Post Grants** tab and then click on **Pending Tasks** in the left navigation menu (Fig. 47). Select the **Task Type**, **Submit Progress Report**, for the grant for which a progress report needs to be submitted. Click **Start** in the **Actions** column to proceed.

Figure 47: Progress Report Pending Task

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The next screen will populate the **Progress Report** (Fig 48 and 49). Review all the information in the **Progress Details** tab. The block titled **Current Quarter Reimbursement Requests** contains a list of all reimbursements and refunds that have been processed during the Billing Period.

Figure 48: Progress Report

Scrolling down the page of the Progress Report contains a section titled, **Progress Update**. In order to enter text and provide details regarding the Progress Report, click on the **Edit** button, which will refresh the page and populate text fields for both questions. Once complete, click **Save**.

Figure 49: Current Quarter Reimbursements and Progress Update

The second tab in the Progress Report is the **Attachments** tab. The user may upload any necessary documents by clicking on the **Add Attachments** button (Fig. 50).
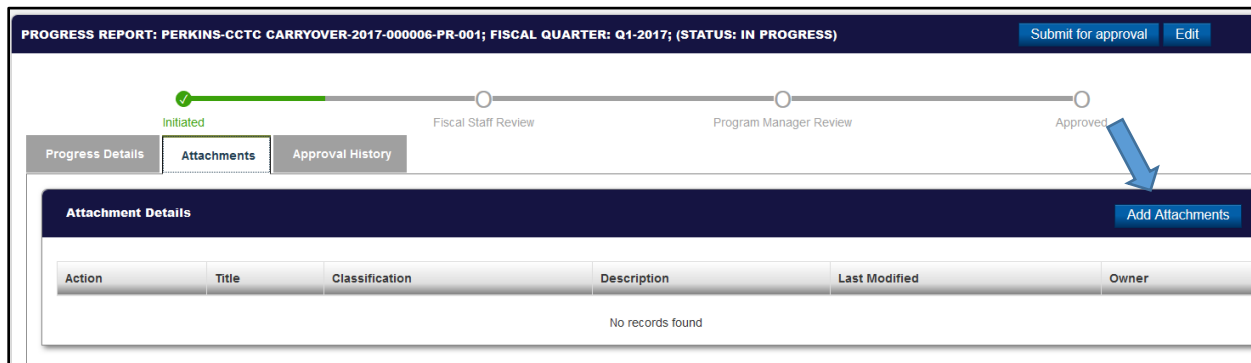
Figure 50: Attachments Tab

Clicking on the button will open a **Documents Upload** window. Complete all the required information and upload the document (Fig. 51). Click **Save** once complete.
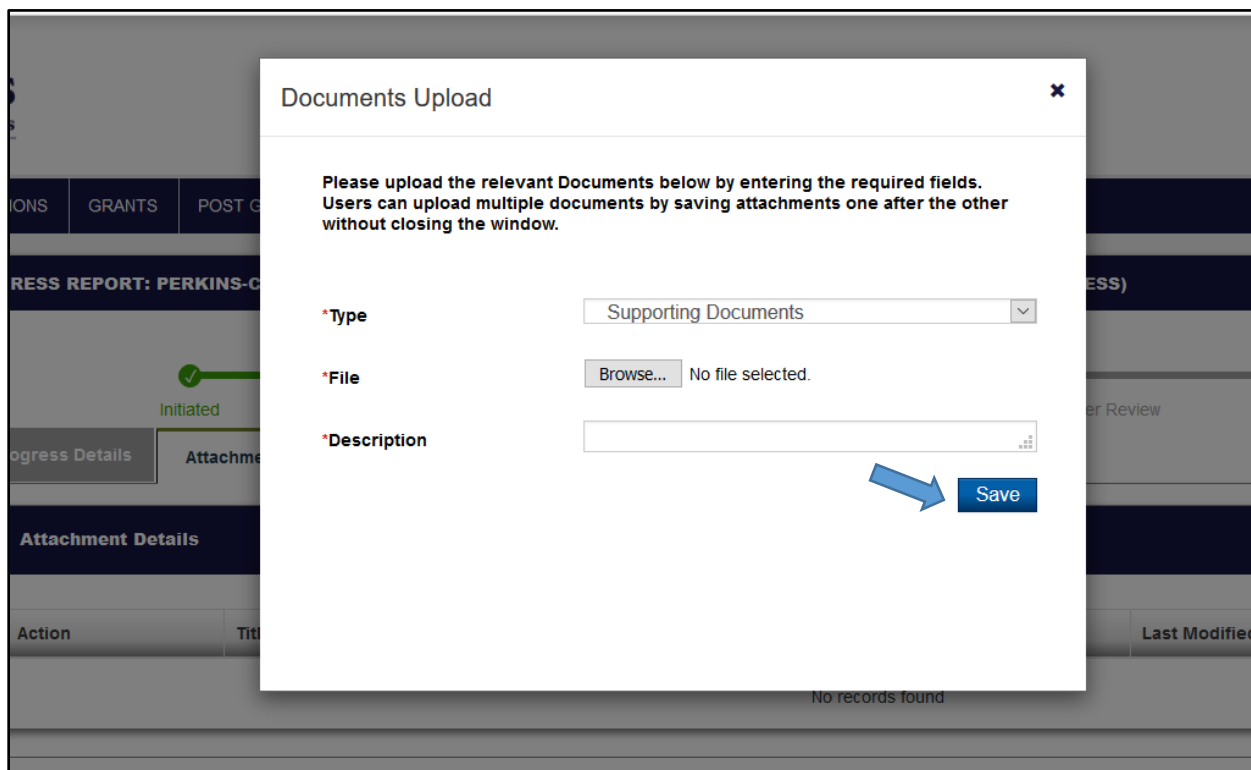
Figure 51: Upload Document

The final tab is the **Approval History** tab, which will display the status of approvals of the Progress Reports once it has been submitted (Fig. 52). Once all tabs have been completed, click on the **Submit for Approval** button.

Figure 52: Approval History Tab

7 SUBMITTING AN AMENDMENT REQUEST

If at any time during the Post Award phase a rearrangement pf the budget is required, the grantee may submit an **Amendment** request. This will **not** change the overall budget amount but instead, will allow the grantee to reallocate dollar amounts between budget categories.

To begin, log in to the **External LCTCS eGrants System** by entering the following URL in to a supported browser: lctcs-egms.force.com .

Once the user has logged in, click on the **Grants** tab and then, the **Active Grants** link in the left navigation menu. Click the hyperlink for Grant for which an **Amendment** needs to be submitted (Fig. 53).

Figure 53: Active Grants

In the **Grant** view screen, click on the **Revisions** tab (Fig. 54). In the **Amendment Request** block, click on the **New** button to continue.
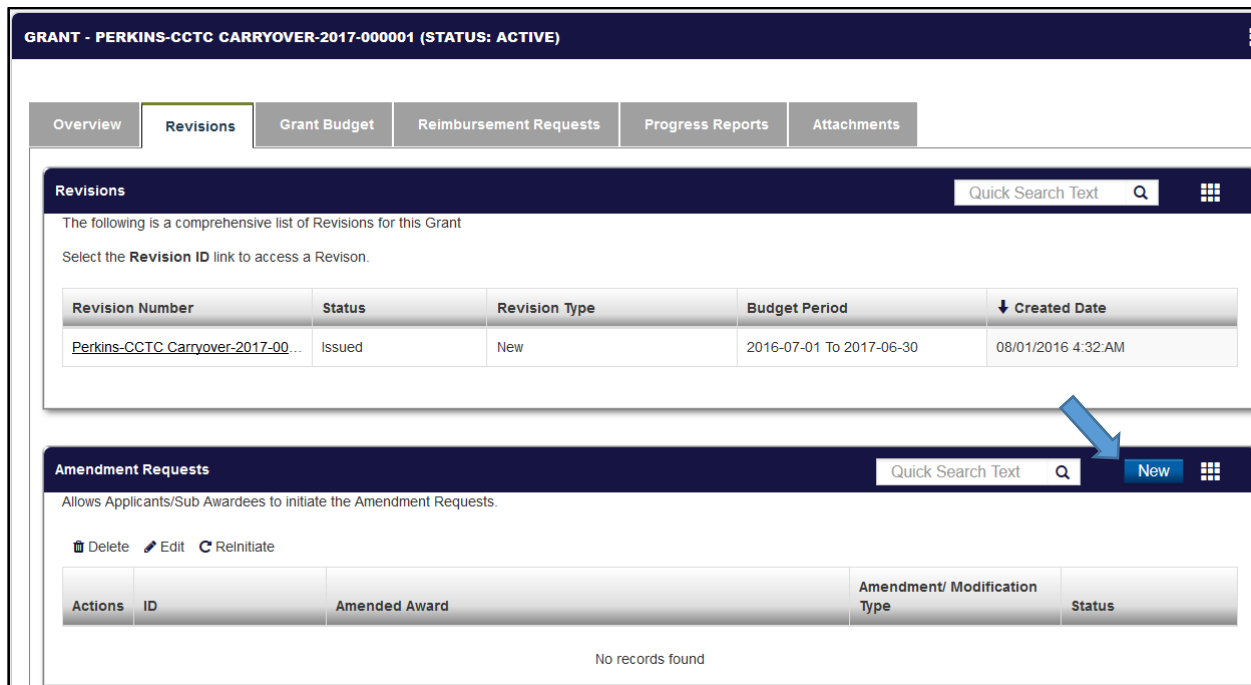
Figure 54: Revisions Tab

Clicking the **New** button will open a new tab in your browser. In the overview tab, complete the **Amendment Details** block by selecting the **Amendment/Modification Type** and enter a **Reason for the Amendment** (Fix. 55). Click **Save** to continue.
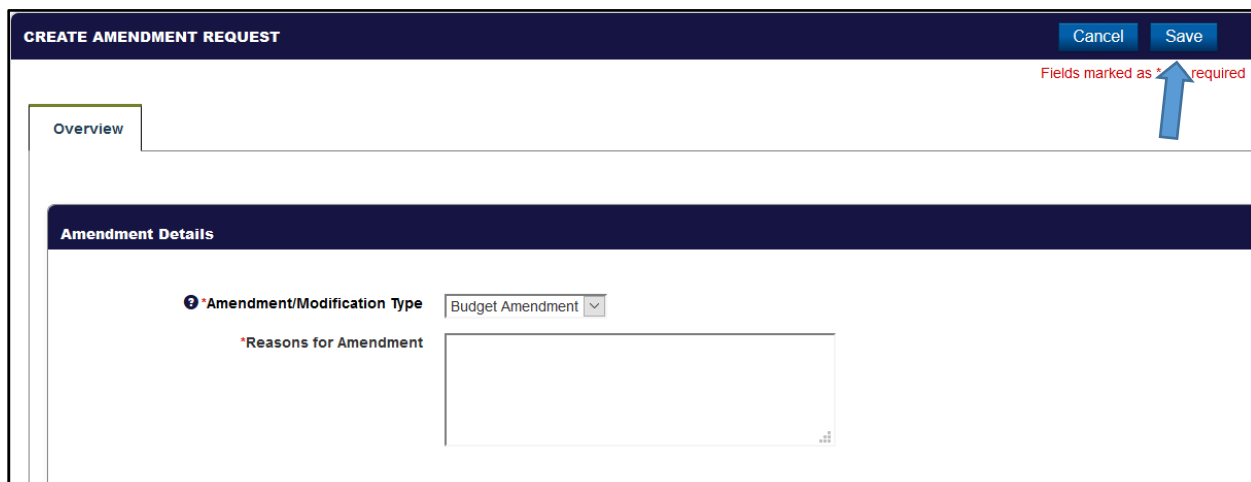
Figure 55: Amendment Request

Clicking **Save** will refresh the page and populate additional tabs. Click **Edit** to begin. In the **Summary Budget** tab, click on the "pencil" icon in the **Details** column (Fig. 56).

| Category Name	Budgeted Amount	Year to Date Spent	Remaining Budget	Requested Revised Budget	Details	Adjustment
1. SALARIES	100,000.00	6,500.00	93,500.00	100,000.00	✏	0.00
2. EMPLOYEE BENEFITS	100,000.00	10,500.00	89,500.00	100,000.00	✏	0.00
3. PROFESSIONAL SERVICES	100,000.00	23,500.00	76,500.00	100,000.00	✏	0.00
4. OPERATING SERVICES/PURCHASED PROPERTY SERVICES	100,000.00	27,000.00	73,000.00	100,000.00	✏	0.00
5. TRAVEL/OTHER PURCHASED SERVICES	100,000.00	32,000.00	68,000.00	100,000.00	✏	0.00
6 a. CONSUMABLE SUPPLIES	100,000.00	25,000.00	75,000.00	100,000.00	✏	0.00

Figure 56: Summary Budget tab

Enter the adjustment amounts in the **Requested Revised Budget** column (Fig. 57). Please remember that the net of adjustments must equal to zero (0). The user is simply reallocating dollar amounts from one budget category in to another. Click **Save** once complete.

Figure 57: Detailed Summary Budget

In the **Attachments** tab, the user may upload any revised documents. Once all the required fields have been completed, click on the **Submit for Approval** button to complete the Amendment Request process.

8 REPORTS

The Primary and Secondary users may access certain reports in the **LCTCS eGrants Portal**. Once logged in, click on the Reports tab (Fig. 57). Clicking on the Report Name link will open a new window and will display the respective report.

Figure 58: Reports

8.1 Submit Annual Performance Report
Applicable to: Grantee

Once the PM has created the **Annual Performance Report**, an email notification will be sent to both the Primary and Secondary users to complete the report and provide Annual Performance Indicators (Fig. 59). A corresponding Pending Task will also be created for both users.
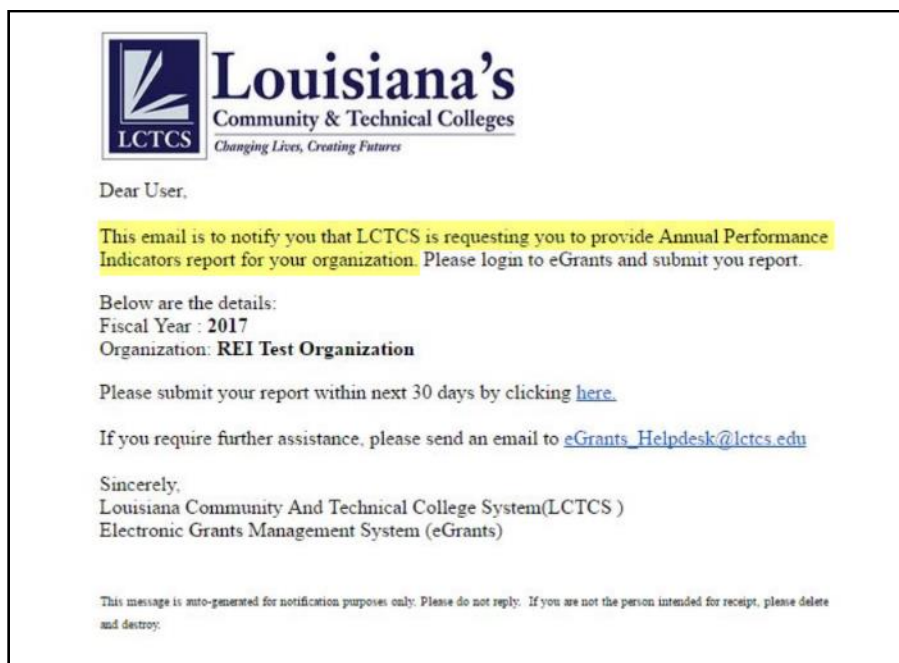
Figure 59: Email notification for Annual Performance Indicators

To begin, log in to the External LCTCS EGMS Portal using the previously established credentials (Fig. 60).

Figure 60: External Login Portal

Click on the **Post Grants** tab and then, click on the **Pending Tasks** link in the left navigation menu. Click **Start** in the **Actions** column next to the **Submit Annual Performance Report** task type (Fig. 61).

Figure 61: Pending Task

The next screen will display the **Annual Performance Report**, to be completed by the user. In the **Performance Section**, click on the **Edit** Icon (Fig. 62).

<u>Important Notes</u>

Unless the conditions below are met, the system will not allow the user to submit the report

1. When entering values for the **Numerator/Denominator**, do not leave any field "empty/blank". If there is no value to enter, **please enter a "0" for that field**.

2. The value for the **Gender** Section Name must match the value of the **Race/Ethnicity** Section Name.

3. The value of the **Numerator** _cannot be greater_ than the Denominator. The calculated percentage cannot be greater than 100%.

Figure 62: Performance Section Table

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In the pop-up window, complete all the required data. Click the **Save** button once complete (Fig. 63).

Figure 63: Edit Section

Complete the **Performance Section** for <u>all tabs</u>. Once complete, click on the **Submit for Approval** button. The tab specifications are described in the chart below.

Performance Level Name	Core Indicator
1P1	Technical Skill Attainment
2P1	Credential, Certificate, or Degree (Completion)
3P1	Student Retention and Transfer
4P1	Student Placement (employment, military, or apprenticeship)
5P1	Nontraditional Participation
5P2	Nontraditional Completion
Post-Secondary Concentrators	Post-Secondary Concentrators
All Post-Secondary Participants	All Post-Secondary Participants

Upon successful submission of the report, the user will receive a confirmation message (Fig. 64).

Figure 64: Confirmation Message

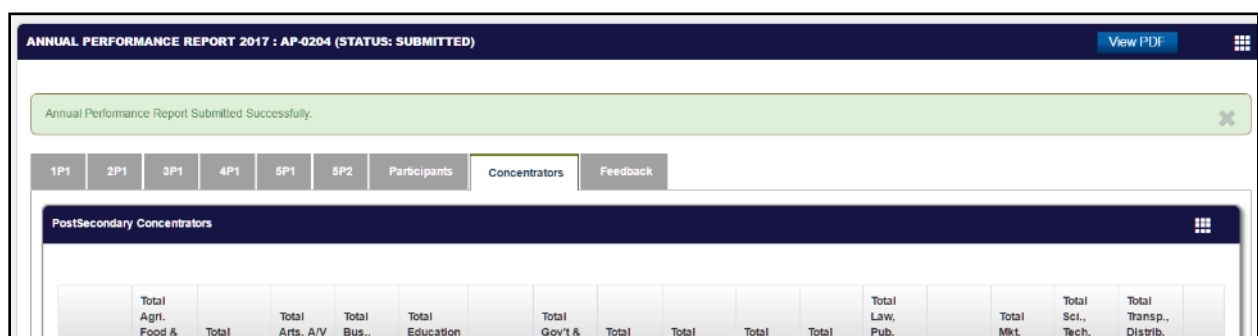## 8.2 Rejected Annual Performance Report
Applicable to: Grantee

If a submitted Annual Performance Report is rejected by the PM, the Primary and Secondary users will receive an email notification (Fig. 65). Both users will also have corresponding Pending Tasks, **Revise Annual Performance Report**. The users will access the task as before, review the feedback regarding the corrections and resubmit the report.
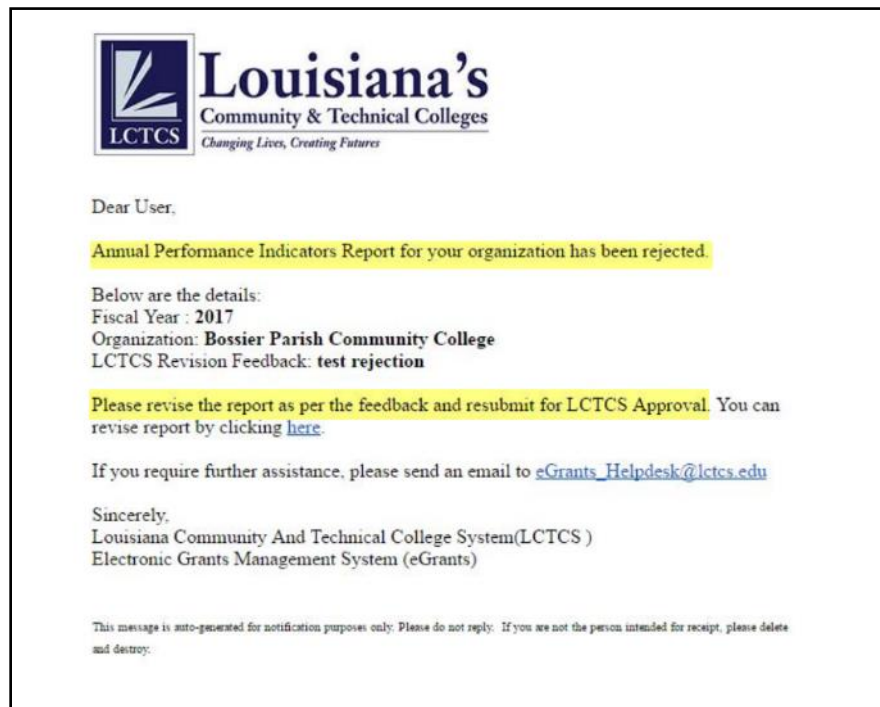
Figure 65: Rejection Email Notification

9 SUBMIT CLOSEOUT

When the Project is completed, the LCTCS Fiscal Staff initiates a Closeout process and sends it to the Recipient for consent. The Recipient receives an email and a Pending task to Submit the Closeout details.

Login to the external **portal** https://lctcs-egms.force.com/ as a Recipient. Click on the **Post Grants** tab and then click on *Pending Tasks* on Left navigation menu.
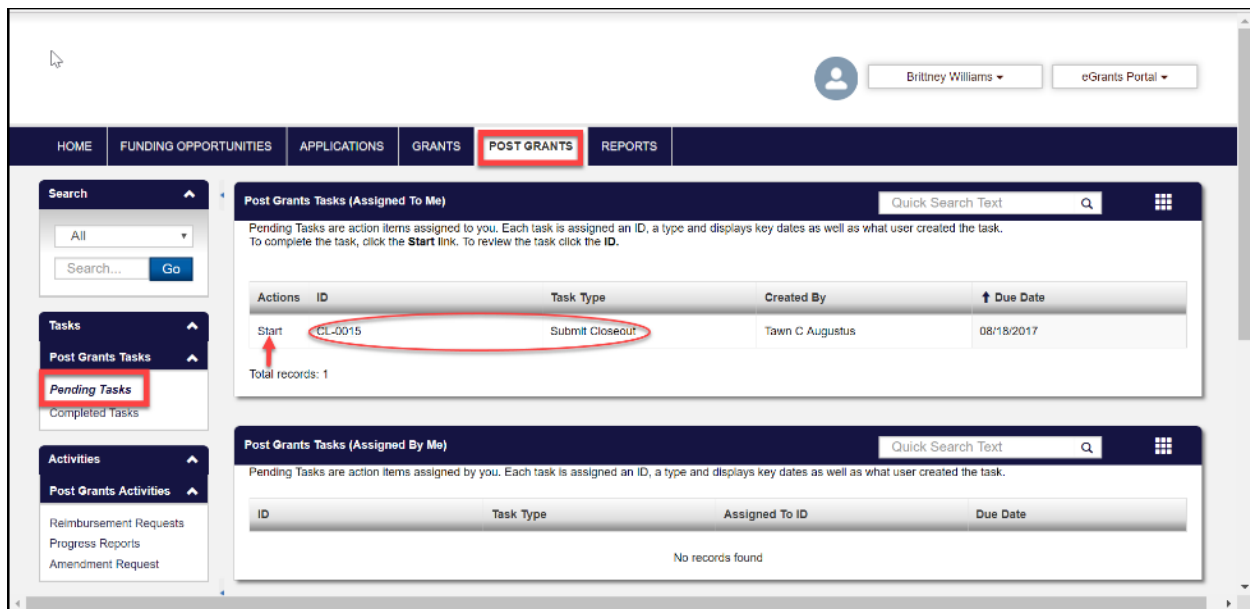
Figure 66: Identifying the task for submitting closeout

The system will display two sections: **Post Grants Tasks (Assigned To Me)** and a **Post Grants Tasks (Assigned By Me).** Under **Post Grants Tasks (Assigned To Me)**. Click on the Start action beside the task type **Submit Closeout** for your Grant. Upon clicking on Start, the System will open a view page with 6 tabs as seen in figure 67.
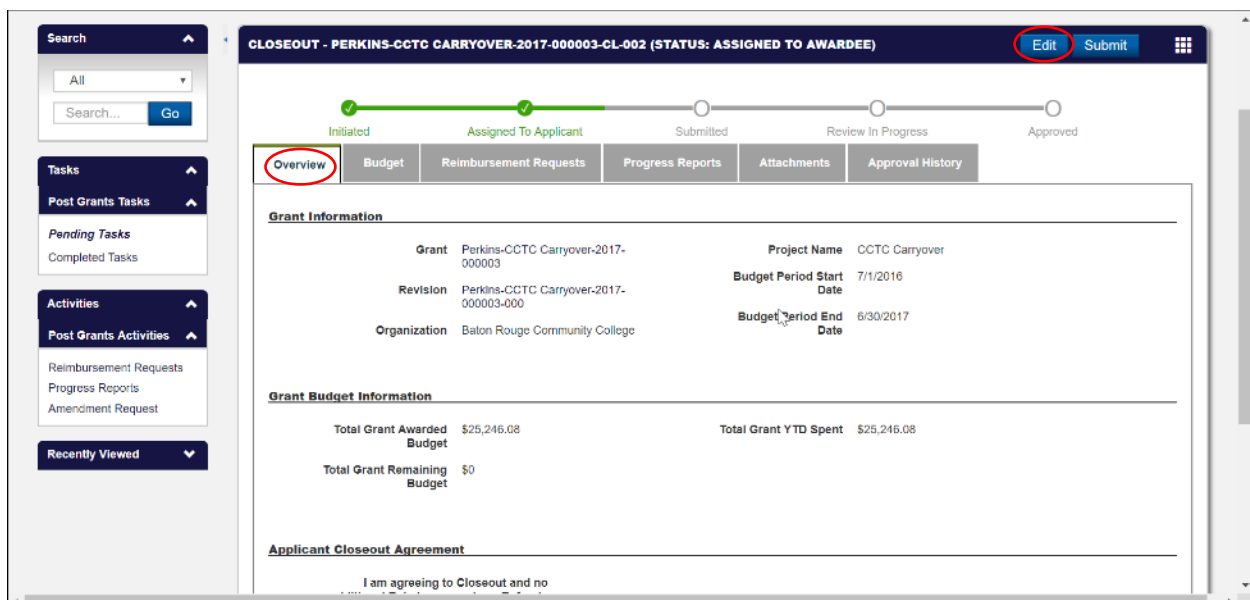

Figure 67: View Page of the tabs

Select the **Overview** tab and click the **Edit** button – highlighted in figure 67. The Overview tab will be the only tab visible. In the **Applicant Closeout Agreement** section of the Overview tab (scroll down to bottom of page), select **Yes/No** in the decision dropdown, to proceed with the Closeout.

Figure 68: Closeout decision

9.1 Choosing to closeout

If you choose to proceed with the closeout, Select **Yes** and click on the **Save** button

Figure 69: Deciding to closeout

Upon clicking **Save**, all previously hidden tabs will be displayed again (Budget, reimbursement request, progress reports, attachments, and approval history). Review the information in all these tabs and click on the **Submit** button. Upon clicking on Submit, the Internal Staff will receive a notification to review and approve the closeout. Upon Final closeout by the Internal Staff, you will receive an email notification.

Figure 70: Submitting the closeout

9.2 Choosing not to closeout

If you choose not to move on with the closeout, select an appropriate reason *(requesting to submit final reimbursement/requesting to submit final refund)* from the dropdown beside **Reasons for not agreeing to closeout field**. Click on the **Save** button.

Figure 71: Deciding not to closeout

Upon clicking **Save**, all previously hidden tabs will be displayed again (Budget, reimbursement request, progress reports, attachments, and approval history). Review the information in all these tabs and click on the **additional Request LCTCS Assistance button**. Upon requesting, the Internal Staff will receive a task to **Initiate Final refund** or **Initiate final reimbursement** based on the reason you chose.

9.2.1 Submit refund

Once the Fiscal Staff initiates the Final refund, you will receive an email notification and a Pending task. Click on the **Post Grants** tab and click on **Pending Tasks** in the left panel of the screen. Click on the **Start** action beside the task type **Submit Refund Request** for your Grant.
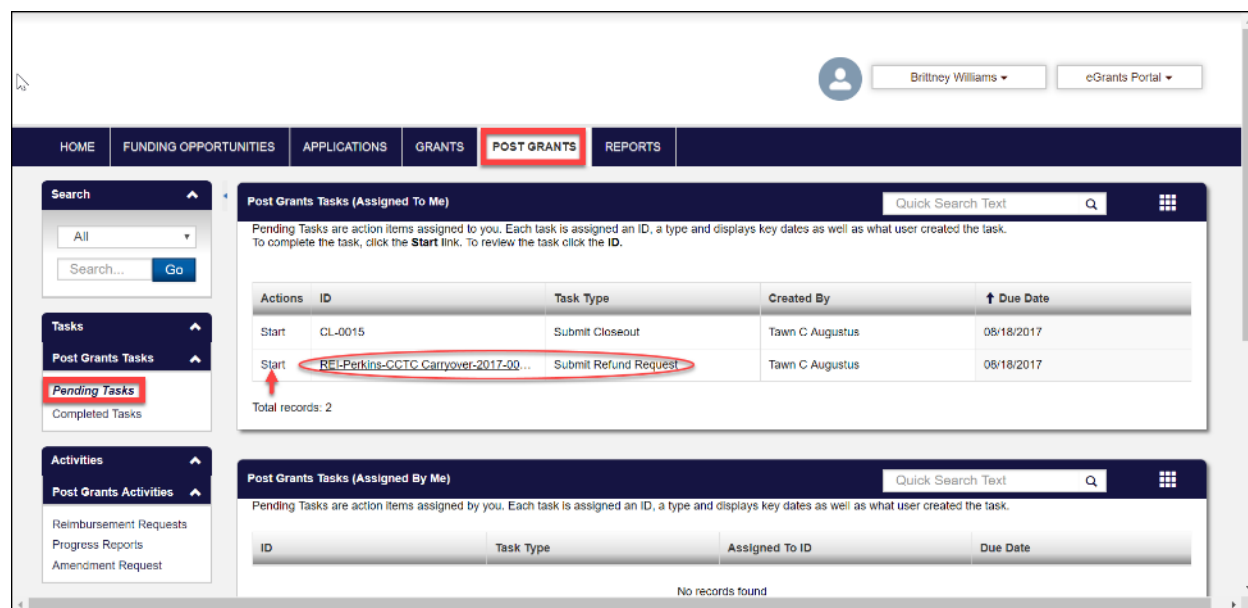

Figure 72: Identifying the task to Submit Refund Request

9.2.1.1 Overview tab

Upon clicking **Start**, two tabs **(Overview and Expense)** will be displayed. Click on the **Overview** tab. In the **Expense Information** section, fill relevant details in the **Reason for refund** text box.

Figure 73: Expense Information section

In the **Payment Information** section, enter the **Check Number and Check Date** (optional). The **Grant information** section has auto populated details about the Grant.

Figure 74: Payment Information section

In the **Fiscal Review** section, click on the check box to confirm that all the data has been entered and the monthly reimbursement and revision is completed and available for the Internal users to review and approve.

Figure 75: Fiscal Review section

In the **Terms & Agreement** section, click on the check boxes to confirm that all the amount claimed are true. Upon filling details in all the sections, click on the **Save** button.

9.2.1.2 Expense tab

Click on the **Expense Details** tab. Fill in the **Requested Expense** column for the Budget categories you would request refund for. Upon filling all the details, click on the Save button. The Internal Staff will receive an email notification to review and approve the Refund request and complete the closeout process. Upon Final closeout by the Internal Staff, you will receive an email notification.

Figure 76: Expense details tab

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9.2.2 Submit reimbursements

Once the Fiscal Staff initiates the Final reimbursement, you will receive an email notification and a Pending task. Click on the **Post Grants** tab and click on **Pending Tasks** in the left panel of the screen. Click on the **Start** action beside the task type **Submit Reimbursement Request** for your Grant.
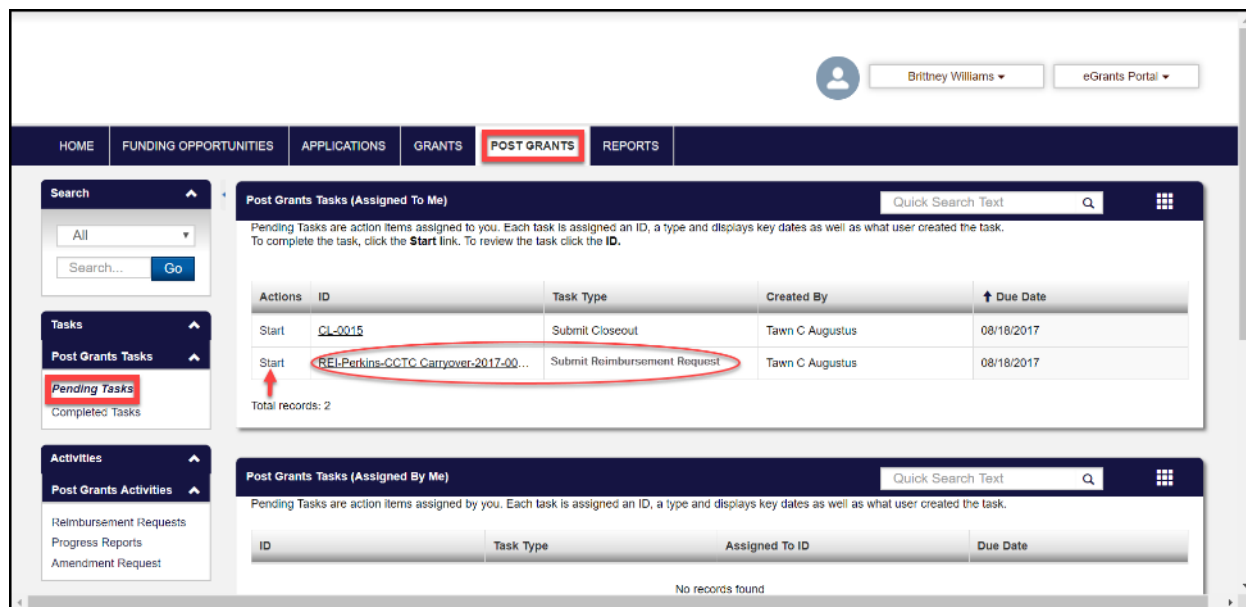

Figure 77: Identifying the task to Submit Reimbursement Request

9.2.2.1 Overview tab

Upon clicking Start, you will be able to see four tabs. Click on the **Overview** tab with auto populated details about the Grant. Review them and click on the **Save** button.

Figure 78: Overview tab

9.2.2.2 Expense tab

Click on the Expense tab and click on the Edit button to enter the **Requested Expense** column for the Budget categories you would request refund for. Click on the **Save** button upon filling all the expense details.

Figure 79: Expense details tab

9.2.2.3 Attachments tab

You may upload any relevant documents in the **Attachments** tab as needed. Click on the Add Attachments button in the **Attachment** table.

Figure 80: Adding Attachments

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Clicking on the **Add Attachment** button will open a new screen to choose and attach documents. Click on the **Save** button when done.
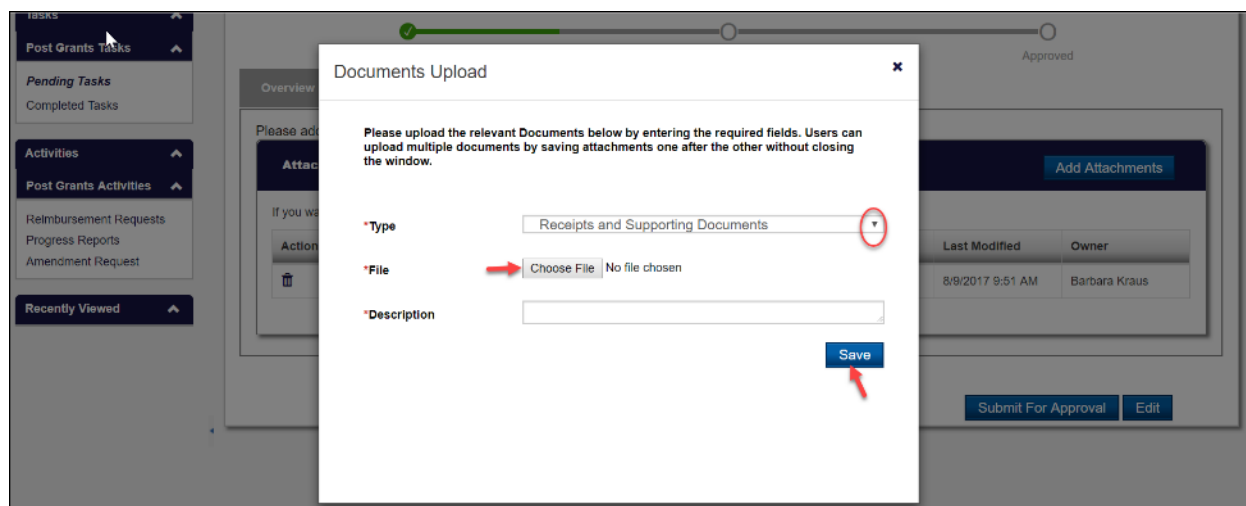

Figure 81: Uploading Attachments

9.2.2.4 Approval History tab

The last tab is the Approval History tab which will display the status of approvals of the Reimbursement requests once it has been submitted. Once all tabs have been completed, click on the **Submit for Approval** button. The Internal Staff will receive an email notification to review and approve the Reimbursement request and complete the closeout process. Upon Final closeout by the Internal Staff, you will receive an email notification.