MONI Grant Electronic Application and Reporting System

GEARS

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

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

#### STEP 1: Saving Your Organization Details Page

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

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

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

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

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

4. Click on VTP Organization Details:

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



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

		SAVE AL	DD NOTE	CHECK GLOBAL ERRORS	
Seck Document Information: OD-2014-VTPTestCo-01875 Details You are here: > Organization Details Menu > Forms Menu					
Organization Information   Organization	Members   Organization Documents   Organization Details				
VTP ORGANIZATION DETAILS					
Please enter the following information and	click save.				
Federal ID:	999999999 *				
DUNS:	00000000 *				
Fiscal Year End:	Day <mark>31 ▼ </mark> * Month Jan ▼ *				
RDC:	CVEDC V				
Region:	Central 🔻 \star				
Business Size: (number of permanent, full-time employees	) <u>100-249</u> <b>*</b>				
Business Type:	C-Corp 🔻 \star				
SOV Vendor #: (VTP Staff will fill in)					
Click 'Save' before leaving page.					

## STEP 2: Initiating the Application

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

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



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

Home Grants/Incentives/ERs	Monitoring/Reporting	Requisitions/0	Claims/Invo	ices	Archive			
			Reports	Train	ing Materials	Organization(s)	<u>Profile</u>	Logout
							SH	IOW HELP
Welcome Test Financial Officer Change Picture	Instructions: Select the SHOW HELP bi > Applying for an Opportur > Using System Messages > Understanding your Tasl > Managing your awarded	utton above for d nity s ks I grant	etailed instr	uction	s on the follow	ing.		
Hello Test, please choose an option b	elow.							
View Available Gran	nts/Incentives,	/ERs						
Select the View Grants/Incentives/ERs bu	tton below to see what is av	ailable to your o	rganization.					
VIEW GRANTS/INCENTIVES/ERS								
😑 My Inbox								
You have 15 new messages. Select the Open Inbox button below to open	n your system message inb	<b>0</b> X.						
OPEN INBOX								
My Tasks								
You have 2 new tasks.								
You have 0 tasks that are critical. Select the Open Tasks button below to view	v your active tasks.							
OPEN TASKS								

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

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



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

# STEP 3: Completing the Application

Requested:

Approval:

Total Amount Pending

0

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

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



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

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

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

#### STEP 4: Submitting the Application

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

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

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

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



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

Priority	Sender	Subject	Date/Time
	System, Grant	VTP Application VTP-APP-B-2017- VTPTestCo-00002 Received	4/11/2016 3:09:11 PM
Recipien	nts		
Hello, Th Program VTPTest	nank you for submitt I (VTP). For your refe Co-00002.	ing an application for training funding to erence, your application number is: VTf	o the Vermont Training P-APP-B-2017-
VTP staf possible	f will review your ap	plication and get back to you with any o	questions as soon as
Thank yo	ou.		
IntelliGra VTP Dire	ants Site: <u>https://gra</u> ector: john.young@	ints.accd.vermont.gov ivermont.gov	
Related D	ocument: <u>VTP-APP-</u>	B-2017-VTPTestCo-00002 (1)	

If there are errors,

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



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

#### STEP 5: Review Process

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

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

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

## STEP 6: Grant Agreement Review & Acceptance

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

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

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

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

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



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

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

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

🕒 Menu 🛈 Forms Men	u 🕑 Status Changes 🕥 Management Tools 🔇 Related Documents and Messages
Back	Status Changes Status Changes Possible Statuses
Document Information Details	GRANT AGREEMENT MODIFICATIONS REQUIRED

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

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

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



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

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

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

	SAVE	SAVE & MOVE TO GRANT AGREEMENT ACCEPTED STATU	S PRINT VERSION	ADD NOTE	CHECK GLOBAL ERRORS
		3.			
O <u>Back</u>					
Document Inf	ormation: VTP-APP-B-2017-	<u>-VTCO-00005</u>			
Details					
You are here:	> VTP Business Application 20	)17 Menu > Forms Menu > Grant Agreement			
GRANT AGR	EEMENT ACCEPTANCE				
Please certify the Status' button.	at your have reviewed the grant ag	greement and accept the terms of the grant agreement	. Click 'Save & Move	to Grant Agree	ement Accepted
Grant Agreeme	nt:VTP-APP-B-2017-VTCO-00005	5			
Organization:	Vermont Company 123 St Thistown, VT 05000 Phone: (802) 000-0000 Fax: 8025055552				
Certification				_	4
I have reviewed	the grant agreement, and as signat	tory for the recipient organization, I accept this grant a	greement and all of i	ts terms. 🗹 🕇	1.
Organization Sig	natory:	Test SAO <b>*</b> 2.			
Signatory Title: Date:		Senior Authorized Official 9/8/2016			

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

Agreement	1
Please make a selection below to continue.	
Please confirm: I, Test FO, have reviewed the grant agreement, and as signatory for the recipient organization, I accept this grant agreement and all of its terms. If you would like to include notes about this status change, please supply them below. 0 of 2000 1 AGREE I DO NOT AGREE	



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

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

## STEP 7: ACCD Grant Approval

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

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