



UTAH *grants*

Utah Grants Update

SPRING FINANCIAL TRAINING

MAY 12, 2020



Utah State Board of Education

ADA Compliant 5-28-2020

Timelines

Reimbursement Requests

June 10, 2020	Deadline for reimbursements to be paid on June allotment (SFY-2020 period 12)
July 10, 2020	Deadline for reimbursements to be paid on July allotment (SFY-2020 period 13)
August 11, 2020	Deadline for reimbursements for program ending June 30, 2020 (SFY-2021 period 1)

Watch **Project Period** dates. Expenditures must be incurred within the project period of performance.

Utah Grants Modules



Dashboards



Grant Summary Report



Assurances



Site Visits / Desktop Review



Risk Assessment

Dashboards and Tables



More information can be found here:

<https://www.schools.utah.gov/financialoperations/utahgrants>

1. Task Summary by Phase
2. Task Summary by Due Date
3. Organization Wide Pending-Tasks
4. Pending Applications by Status
5. Applications table
6. All Grants table
7. Pending Payment Requests – USBE
8. Monitoring Schedule Active Grants table

Grant Summary Report

The screenshot displays the 'Enterprise Grants Management System' interface. The top navigation bar includes 'HOME', 'Opportunities', 'Applications', 'Grants', and 'Monitoring', with a red box highlighting a circular refresh icon. The left sidebar contains 'Search', 'Activities', 'Reports', and 'Useful Links', with 'Grant Summary Report' highlighted under 'Reports'. The main content area shows a table of reports.

Report Name	Description	Format
USBE Payment Requests	USBE Payment Requests	Tabular
USBE Applications	USBE Applications	Tabular
USBE Awards	USBE Awards	Tabular

Grant Summary Report

Grant Summary Report By Program

(done)

Program Id	Program Title	Details By Subrecipient						
Subrecipient Id	Subrecipient Name	Awarded Amount	Total Payment	Adjustments	IDT	Remaining amount	Waiver amount	
PG-400-0001	19PRE IDEA Preschool	140	\$206,401.49	\$206,401.49	\$0.00	\$0.00	\$0.00	\$0.00
PG-400-0002	19FTFL IDEA School Age - Flow Through Formula	140	\$8,126,002.69	\$8,126,002.69	\$0.00	\$0.00	\$0.00	\$0.00
PG-400-0003	Perkins-Formula (High School)	140	\$441,618.00	\$441,618.00	\$0.00	\$0.00	\$0.00	\$0.00
PG-400-0007	Kindergarten	140	\$5,494,390.22	\$5,494,390.22	\$0.00	\$0.00	\$0.00	\$0.00
PG-400-0008	Flexible Allocation	140	\$5,881,071.67	\$5,881,071.67	\$0.00	\$0.00	\$0.00	\$0.00
PG-400-0009	Voted Local Levy	140	\$6,915,449.67	\$6,915,449.67	\$0.00	\$0.00	\$0.00	\$0.00

Assurances



LEA Assurances will be completed in Utah Grants



Assurance tasks will be available **June 1, 2020**



Task will be sent to the Utah Grants LEA Key Point of Contact



Can be modified/saved by any Utah Grants user prior to submission



Assurances are due to USBE by **July 1, 2020**

Assurances

Task to Key Point of Contact

The screenshot displays the Enterprise Grants Management System (EGMS) interface. The top navigation bar includes the Utah Grants logo, the system name, and a 'Grants Portal' dropdown. A secondary navigation bar contains 'HOME' (highlighted with a red box), 'Opportunities', 'Applications', 'Grants', and 'Monitoring'. A left sidebar lists various menu items, with 'Pending Tasks' (highlighted with a red box) selected. The main content area is divided into two sections: 'Pending Tasks (Assigned To Me)' and 'Pending Tasks (Assigned By Me)'. The first section contains a table with one record, where the 'EGMS ID' 'ASR-002' and the 'Subject' 'Complete and Submit Assurance for Fiscal Year 2020' are highlighted with a red box. The second section is currently empty.

Enterprise Grants Management System

Grants Portal

HOME Opportunities Applications Grants Monitoring

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Org wide Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Useful Links

Utah.gov

Grants.gov

REI Systems Inc

▲ Pending Tasks (Assigned To Me)

Search...

EGMS ID	Type	Subject	Assigned By	Due Date	Phase Name	Actions
ASR-002	Complete and Submit Assurance	Complete and Submit Assurance for Fiscal Year 2020	Rebecca Nielsen	05/27/2020	RecipientHo...	▶

Total Records: 1

▲ Pending Tasks (Assigned By Me)

Search...

Ref. ID	Type	Subject	Assigned To	Due Date
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No records found

Assurances

Accessing the Form

The screenshot displays the Assurance ASR-002 interface. At the top left, it shows 'Assurance ASR-002' and a 'Submit Assurance' button. Below this, the LEA Id is 040, the Status is Created, and the Fiscal Year is SFY-2020. A progress bar indicates the current status is 'Created', with other stages being 'Submitted to Grantor' and 'Approved'. The 'Form' tab is selected, showing a table with one record: 'Assurance Form 2020'. A red arrow points to the 'Actions' column for this record, which contains a green eye icon and a blue pencil icon. Below the table is an 'Attachments' section with a table header and a note that 'No Records Found'. A 'Submit Assurance' button is also present at the bottom right.

Assurance
ASR-002

LEA Id: 040 Status: Created Fiscal Year: SFY-2020

Submit Assurance

Created Submitted to Grantor Approved

Overview **Form**

Form

* Records are sorted by Last Modified Date DESC

Form Name	Actions
Assurance Form 2020	 

Attachments

Name	Type	Description	Date Attached	Attached By	Actions
No Records Found					

Submit Assurance

Assurances

Form Questions

Assurance Form 2020 Cancel Save

Form Name
Assurance Form 2020

LEA COMPLIANCE AND ASSURANCE CHECKLIST **For 2019 - 2020 School Year**

Utah public Local Education Agencies (LEAs) are legally responsible for compliance with or assurances regarding the following federal requirements, Utah State law, or Utah State Board of Education (USBE) Board rule, as described in the references within this document. Verification of compliance by USBE is authorized under Article X Section 3 of the Utah Constitution, Utah Code 53E-3-401, and USBE Board rule R277-108. Each local school board or charter school governing board shall provide, consistent with State law, written assurance of the following requirements through this submission, as well as through the Data Gateway "My Surveys" portal.
[view less](#)

▲ FINANCIAL OPERATIONS

The LEA assures that it has complied with each of the following requirements as outlined in Code and Rule... [view more](#)

1) School Emergency Response Plan
By July 1 of each year, the Emergency Preparedness Response Plan has been practiced at the school level and presented to and reviewed by its staff, administrators, students, parents, local public safety representatives and a copy has been filed with the LEA.

Authorizing, Implemented, or Interpreted Law
53G-4-402(18) R277-400

(Add *Link to LEA's policy and procedure in the comments section.)
 Yes No

Comments

Assurances

Declaration

▲ DECLARATION

The parties referred to in this document are all Federal agencies, including but not limited to the United States Department of Education, the [view more](#)

District Superintendent or Charter School Director

Date Submitted

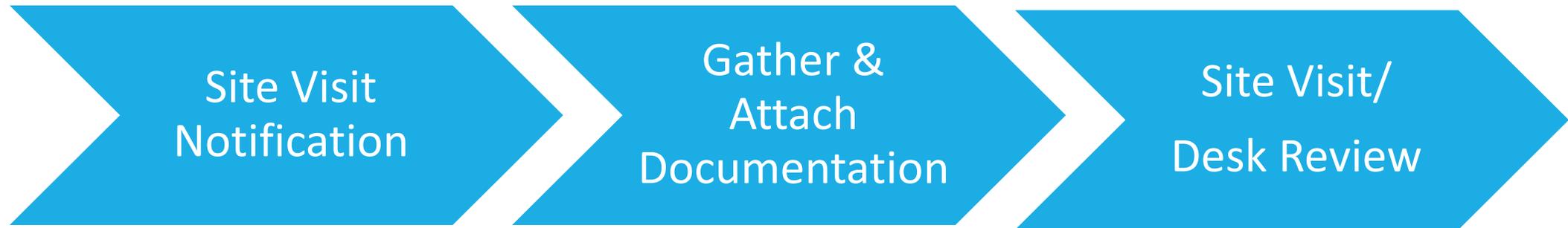
Assurances

Saved in Organization Profile

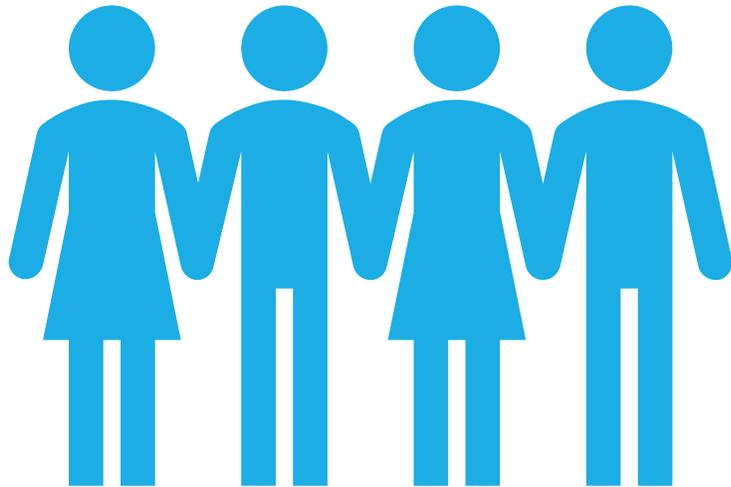
The screenshot displays the 'Enterprise Grants Management System' interface. The top navigation bar includes 'HOME', 'Opportunities', 'Applications', 'Grants', and 'Monitoring'. The left sidebar contains sections for 'Search', 'Tasks', 'Activities', and 'Useful Links'. The 'Manage Organization Profile' link is highlighted with a red box. The main content area shows the organization 'Cache Co School District' with details: ID 040, Registered Date 05/11/2018 11:32 AM, Status Active, and Parent Organization USBE. Below this, a tabbed interface has 'Assurances' selected and highlighted with a red box. The 'Assurances' table lists one entry: ASR-002 for SFY-2020, SubmittedBy, ReviewedBy, Status Created, and an Actions column with a green eye icon. A red arrow points to this icon.

Assurance Name	FiscalYear	SubmittedBy	ReviewedBy	Status	Actions
ASR-002	SFY-2020			Created	

Site Visits / Desk Reviews



Site Visits - Contacts

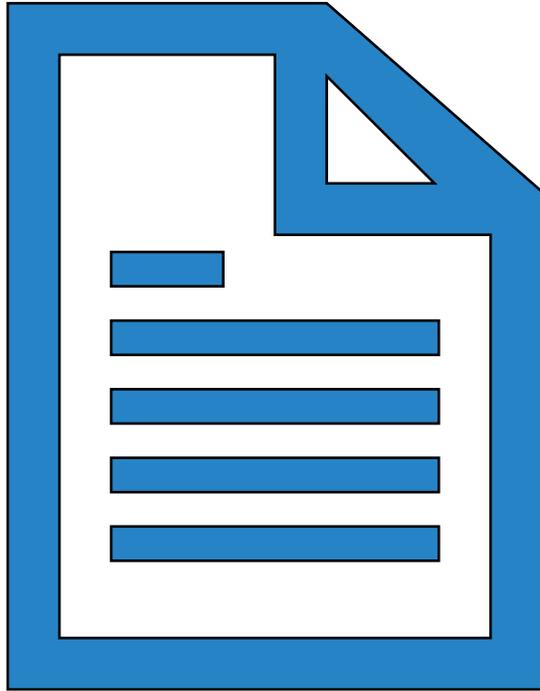


Notification email will be sent from Utah Grants to all Site Visit Contacts

Contacts do not need to be Utah Grants Users to receive notification

Site visit record can be accessed by any active system user

Expected that site visit will be managed by existing user

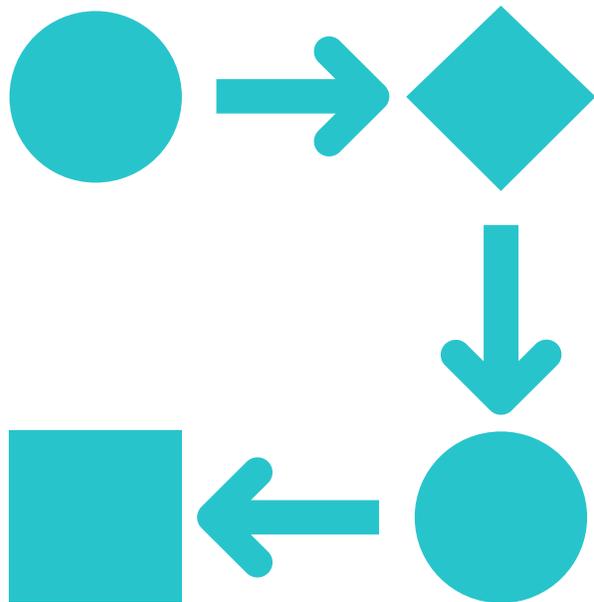


Site Visits - Documentation

USBE Program Offices can associate/link site visits with multiple programs for better coordination between programs

All documentation requested and documents provided are attached directly in Utah Grants

Attachments are to be included as per instructed by site-visit team (prior to audit or during the audit).



Site Visits - Process

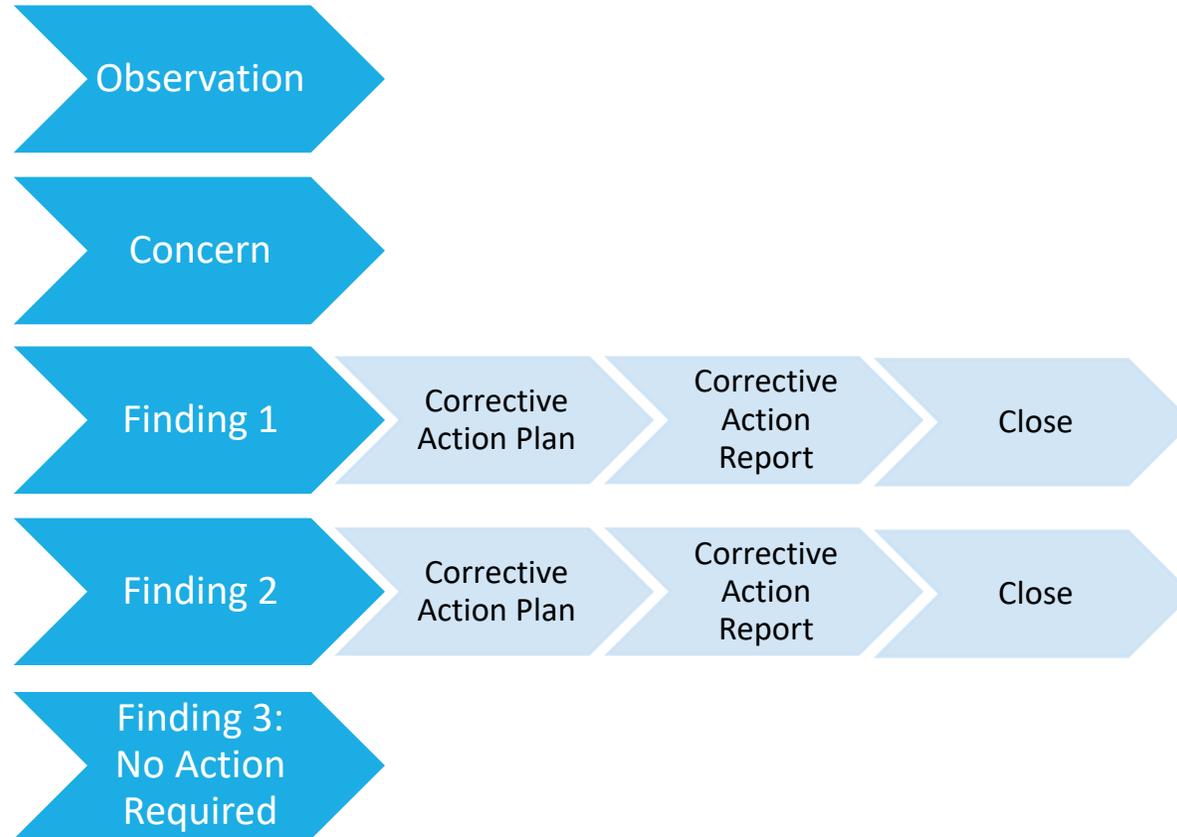
New workflows will take some getting used to. Program Staff and Utah Grants Team can be technical resources.

Program Staff will also be sending communications outside of Utah Grants while ramping-up.

Program Office determines if mandatory to use site visit module or send documentation via other means.

Comprehensive way to notify, document, and report on site visits

Site Visits – Outcomes



Risk Assessment



New form to be completed as part of SFY-2021 applications



Risk assessments will be used by section staff to determine monitoring activities

Risk Assessment

Risk Assessment Form Back Save

Fields marked as * are required

▲ Form

*When was your last Fiscal Monitoring Visit by USBE staff? (as of Nov 1)

- Last fiscal monitoring visit was three or more years ago.
- Last fiscal monitoring visit was between two and three years ago.
- Last fiscal monitoring visit was between one and two years ago
- Last fiscal monitoring visit was within the last year

*Has there been turnover with the Program Director position? (as of Nov 1)

- Program Director hired/started within the last year.
- Program Director hired/started between one and two years ago.
- Program Director hired/started between two and three years ago.
- Program Director has been in the position for three or more years.

Utah Grants Support

Questions?

Email: UtahGrants@schools.Utah.gov

Phone: 801-538-7604