



GOVERNOR'S OFFICE OF  
CRIME CONTROL & PREVENTION

Governor's Office of  
Crime Control & Prevention

Grant Management System

Complete User Manual

Version 4.9

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# 1 Introduction

The web-based GOCCP Grant Management System (GMS) provides a single portal through which all of the tasks associated with applying, awarding, and managing of GOCCP grants are performed. Actual access to certain sections of the GMS are based on permissions assigned to each user.

Internal GOCCP staff use the system to:

- Manage all funding programs and grant funding distribution information
- Make funding available for applicants
- View, administer, and manage all grant applications and grant awards
- Manage the contacts and organizations databases
- Administer user access to the system
- Create and process reports

External organizations (sub-recipients) use the system to:

- Input and manage information pertaining to their organization
- View/search for available funding
- Apply for grants
- View the status of grant applications
- Manage / maintain compliance information for awarded grants

## 1.1 Record Locking

GMS is a multi-user system – many internal and external users may be logged on and working in the system simultaneously. For this reason, GMS uses record-locking to avoid two users editing the same application, award, funding program or other system features at the same time.

- If you attempt to edit a record in GMS and you receive an error message indicating the record is locked, check with other users in your organization to be sure no one else is editing the same record.
- If this does not solve the problem, please email us by clicking the red question mark icon shown in the top right corner of every screen and clicking the **contact support** link.

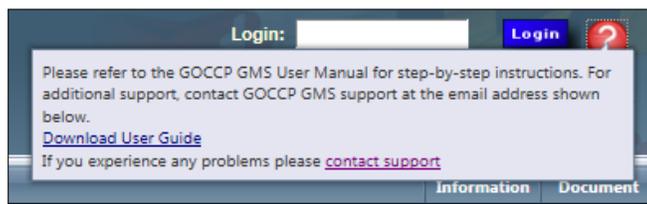


Figure 1 - Contact Support

## 2 Purpose

This manual describes all GMS processes and procedures, including the grant application process, and is available only to internal users. Information from this manual that is applicable to external users is provided in a separate manual.

Internal users are members of the GOCCP grant management team and are responsible for the following tasks:

- Identifying and maintaining the GOCCP Organizations and Contacts databases
- Enabling external users and administering rules (user roles and actions)
- Identifying and maintaining the GOCCP Funding Programs, Related Funding Year, GFDs and relative NOFAs
- Defining and managing the Grant Application Process
- Defining and managing the Grant Award Process, including Award notification
- Defining and Managing the Grant Management System Process

### 3 Getting Started – the GOCCP Grant Management Home Page

The GOCCP Grant Management home page is accessible to the public and provides a summary of the active NOFAs (Notice of Funding Availability) along with an area for authorized users to log into the secure GMS.

- It is a non-secure web page and as such only provides a list of available NOFAs and the parameters associated with each.
- You can view detailed NOFA information upon successful login with a valid Login and Password.



Figure 2 - Public View of GOCCP GMS Website

- Available GOCCP NOFAs are listed on the page with its Eligible community and the Grant Application Deadline date. Each NOFA also contains two additional sources of information for the user:
  - NOFA Detail Summary is accessible from the Information column by clicking the magnifying glass icon. This view provides initial parameters on the available funds such as Start Date, End Date, Online Application Deadline, Hardcopy Application Deadline, Funding Year, Eligibility Description and Deadline Description.
  - If additional documentation for a NOFA is available, a document download icon appears in the Document column of the NOFA record.
- If there are more NOFA records than can be displayed on one page, a page navigation tool is provided at the bottom of the Home Page to help you navigate through the entire list of NOFAs.



Figure 3 - Page Navigation Tool

Please refer to the section *Navigating GMS* for a more detailed description of navigation features in GMS.

## 3.1 Register as a GMS User

### 3.1.1 Create a GMS Login

Create a Login that will uniquely identify you in GMS.

- Choose a user name you will easily remember, for example your first initial + last name
- Use only alphanumeric characters (a-Z, A-Z, 0-9) – special characters (#, !, ?, etc.) are not accepted

### 3.1.2 Create a Password

Your password must be at least **8** characters in length with at least **1** special character (non-alphanumeric characters such as &, \$, #, %, etc.). If the password you enter does not meet these requirements, you will see the following error message:

Password: Minimum characters required: 8 non-alphanumeric characters required: 1

**Note:** Passwords are case-sensitive.

## 3.2 Log Into GMS

Enter your Login (GOCCP-assigned User ID) and Password in the top right hand corner of the GOCCP Home page and click on the Login button to access GMS.

The image shows a login form with two input fields: 'Login:' and 'Password:'. To the right of the 'Login:' field is a blue 'Login' button and a red circle with a white question mark. Below the 'Password:' field is a blue link that says 'Forgot Password?'. The background of the form is a dark blue gradient.

Figure 4 - GMS Login

### 3.2.1 I Forgot My GMS Password

Your GMS user account will be locked if you attempt to log in with an incorrect password **five** times in any **ten** minute period.

If you forget your password and have not made enough attempts to cause your account to be locked, you can request a password reset:

1. Click on the Forgot Password? link shown in Figure 4.
2. Enter your User Name (this is the User ID you log into GMS with, not the email address associated with your User ID) then click the Submit button.



3. The Identify Confirmation dialog box is displayed next. Type the answer to the security question you chose when setting up your GMS account, then click the Submit button.



4. You will then receive a confirmation message that your request has been received.



5. A new password will be sent to the email address registered with your User ID.
6. Return to the GMS Login screen and log in with your User ID and the new password that was emailed to you.

**Note:** If you've made *five* attempts within a *ten* minute period and your account has been locked, contact GOCCP Admin Support Staff. With proper verification, they will unlock your account and reset your password.

## 4 Quick Reference

The following quick reference sheet provides a high-level overview of commonly used GMS features:

### Maryland GOCCP Grant Management System Quick Reference

**Navigation Bar**  
Float your cursor over a menu item to see choices.

**Location Bar**  
Changes to show you where you are in the system.

**Sort Fields**  
Click on any column heading in a dashboard to sort the display by that heading. Click once for ascending, twice for descending order.

**Search Fields**  
Type text into search boxes under column headings (when available) the hit ENTER to return records that match (exact or partial).

**Drop-Down Lists**  
Click the arrow on a drop-down list and select an item to narrow the list of records.

**Dashboards**  
Available Funding  
Applications  
Grant Awards

**Home Screen**

**Function Menus**

Context-sensitive Menus guide you through the process of applying for a grant or managing funding programs & grants. When you click an item in the menu, the right-side window displays fields for required information associated with the menu item. If you see a SAVE button, you must click it when you are finished, or you will lose the information you entered. If you do not see a SAVE button, the information is automatically saved when you enter it.

**Context Menus**

**Other Navigation Tips**

**Drag & Drop**  
Example: Add an organization to a Grant Fund Distribution (GFD) by clicking and holding on the organization in the Available Organizations pane, dragging it to the top of the Eligible GFD Organizations pane, and releasing when you see the dotted line.

**Add New Records**  
The + Add new record button appears anywhere in the GMS that you are able to add new records. Click on the + icon, and the fields to enter the new information into will appear directly below "Add new record".

*If there is a Save button, you must click it to save your work before moving on.*

Information in this pane changes according to the item you click in the Context Menu.

## 5 Navigating GMS

### 5.1 GMS and Your Computer

GMS is a web-based application designed to run entirely from within your web browser. The GMS user community is comprised of many different individuals and organizations using various types of computers, operating systems, monitors, screen resolutions, and web browser settings.

Based on your computing environment, the appearance of some GMS screens can vary from what is shown in this manual. The functionality does not change, but some screens can vary in appearance. For example, on one computer the Grant Award Face Sheet will display data entry fields *beside* their labels, as shown in Figure 5:

The screenshot displays the 'GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION' interface. The main content area shows a 'Grant Award Face Sheet' for grant number VAWA-2011-1021. The 'PROJECT DATES' section is highlighted with a red box, showing data entry fields placed to the right of their labels:

Field	Value
GFD Code	VAWA
GFD Title	Violence Against Women - 2011
Funding Start Date	7/1/2011
Funding End Date	6/30/2013
Start Date	10/1/2011
End Date	9/30/2013

Other sections visible include 'GRANT SEQUENCE NUMBER', 'PROJECT TITLE', 'APPLICANT AGENCY', 'IMPLEMENTING AGENCY', 'COUNTY/MUNICIPALITY', and 'GRANT ROLES'. The 'AWARD DATES' section shows a timeline of events from 9/18/2011 to 10/31/2011.

Figure 5 - GMS Screenshot: Data Fields Appear Beside Labels

While on another computer – one that uses a different screen resolution or different web browser settings – the data entry fields are displayed *below* their labels, as shown in Figure 6:

GOVERNOR'S OFFICE OF  
MARYLAND CRIME CONTROL & PREVENTION

Welcome back, superadmin! Logout

Home Grant Management Funding Management Address Book Reports Admin Logout

Grant Management > Award Search

Grant Number: VAWA-2011-1021    Awarded: \$62,000.00    Award Reported %: 100.00 %    Match: \$103,757.00    Match Reported %: 71.65 %    Project Dates: 10/01/2011 - 09/30/...    Title: Domestic Violence Pr...    Grant Award Status: Award In Compliance

**GRANT SEQUENCE NUMBER**  
Sequence Number: 1021

**PROJECT TITLE**  
Project Title: Domestic Violence Prosecution

**APPLICANT AGENCY**  
 Is service site?  
 Address: 225 North Center Street, Room 300  
 City, State Zip: Westminster, MD 21157  
 Org. Type: Local Government  
 County: Carroll  
 Auth. Official: J. Douglas Howard

**IMPLEMENTING AGENCY**  
 Is service site?  
 Address: 225 North Center Street, Room 300  
 City, State Zip: Westminster, MD 21157  
 Org. Type: Local Government  
 County: Carroll  
 Auth. Official: J. Douglas Howard

**COUNTY/MUNICIPALITY**  
 County: Carroll  
 Municipality: [Select One]

**PROJECT DATES**  
 GFD Code: VAWA  
 GFD Title: Violence Against Women - 2011  
 Funding Start Date: 7/1/2011  
 Funding End Date: 6/30/2013  
 Start Date: 10/1/2011  
 End Date: 9/30/2012

**AWARD DATES**  
 Approved Letter Pending: 9/19/2011  
 Award Letter Sent: 9/26/2011  
 Award Accepted: 10/31/2011  
 Accept Package Sent: 9/26/2011  
 Proj Commencement Recvd: 10/31/2011

**INVENTORY**  
 BRIEF Received

Figure 6 - GMS Screen: Data Fields Appear Below Labels

The functionality has not changed – only the location of the data entry fields have.

When differences in displays or resolution cause fields to be pushed down the page, a vertical scroll bar will appear; simply scroll down the page to see the additional fields.

## 5.2 The GMS Home Page

The secure GMS Home Page is displayed upon successful login:

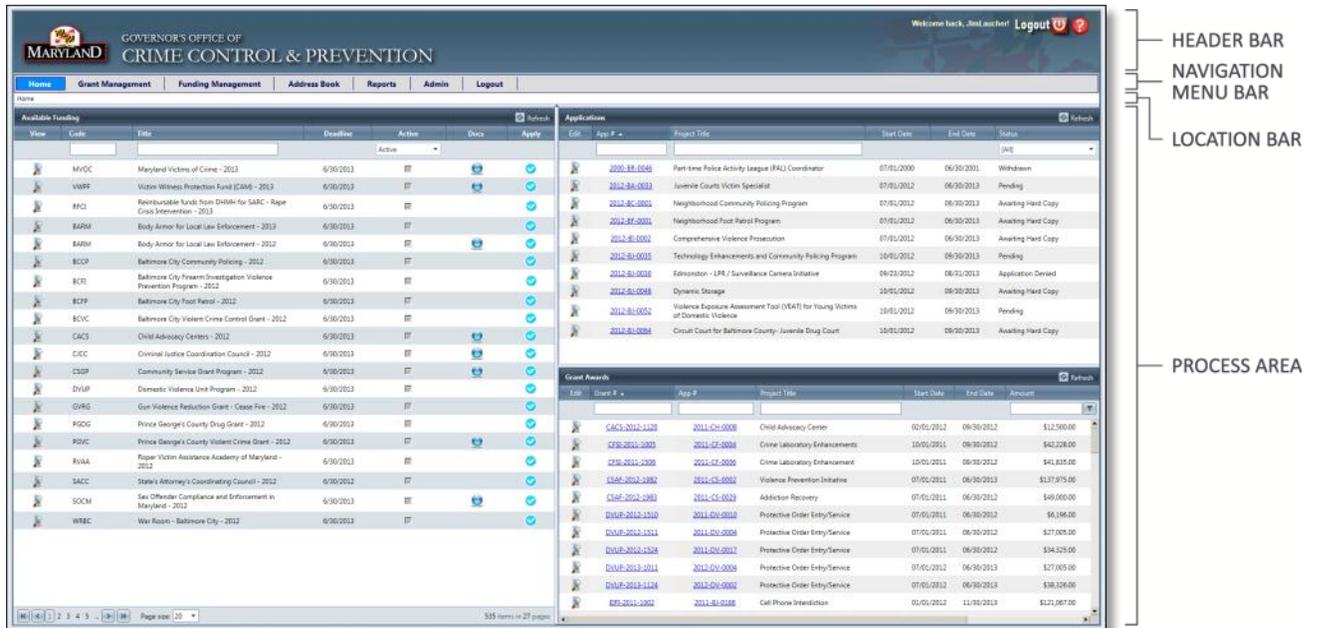


Figure 7 - GMS Home Page

The GMS interface consists of the *Header Bar*, *Navigation Menu Bar*, and *Location Bar* which are fixed in place and appear at the top of every screen throughout GMS. The *Process Area* changes based on the task you are currently performing.

### 5.2.1 Header Bar

The Header Bar displays the GOCCP logo and appears at the top of every screen in GMS. It contains links for logging in & out of GMS, accessing a PDF version of this manual, and contacting customer support.



Figure 8 - GMS Header Bar

- Click the Logout button at any time to leave GMS, which will log you out regardless of where you are in the system. Be sure to SAVE your work BEFORE clicking the button.
- Click on the Help button (question mark in the red bubble) if you need help with a procedure or wish to contact technical support at any time while using GMS.



Figure 9 - GMS Help Button

- Within the Help button pop up box, click the *Download User Guide* link to download a PDF version of the GMS User Manual, or
- Click the *Contact Support* link to send an email to support. Doing this will create a new message addressed to *GMSsupport@goccp.state.md.us* using your default email program. NOTE: If your default email program does not open when you click on the Contact Support link, you can copy this email address, create a new email as you normally would, and paste this email address into the TO: line.

Note: You can hide the Header Bar at any time by clicking on the center-arrow on the bottom border of the Header:

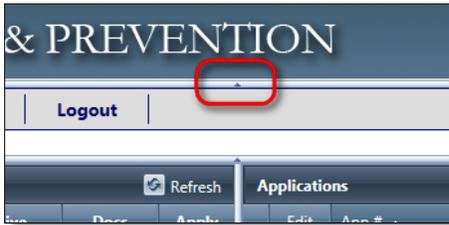


Figure 10 – Header Bar Center-Arrow

Click the center-arrow once to hide the Header Bar:

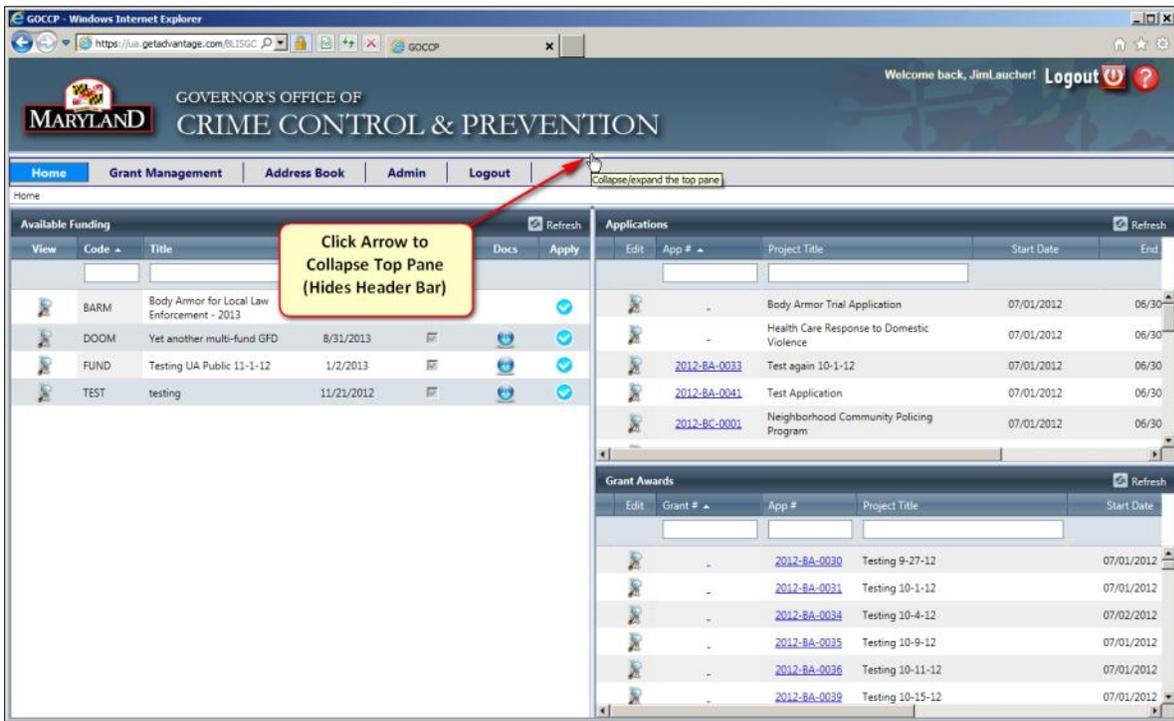


Figure 11 – Click Center-Arrow to Hide Header Bar

Click the center-arrow again to show the Header Bar:

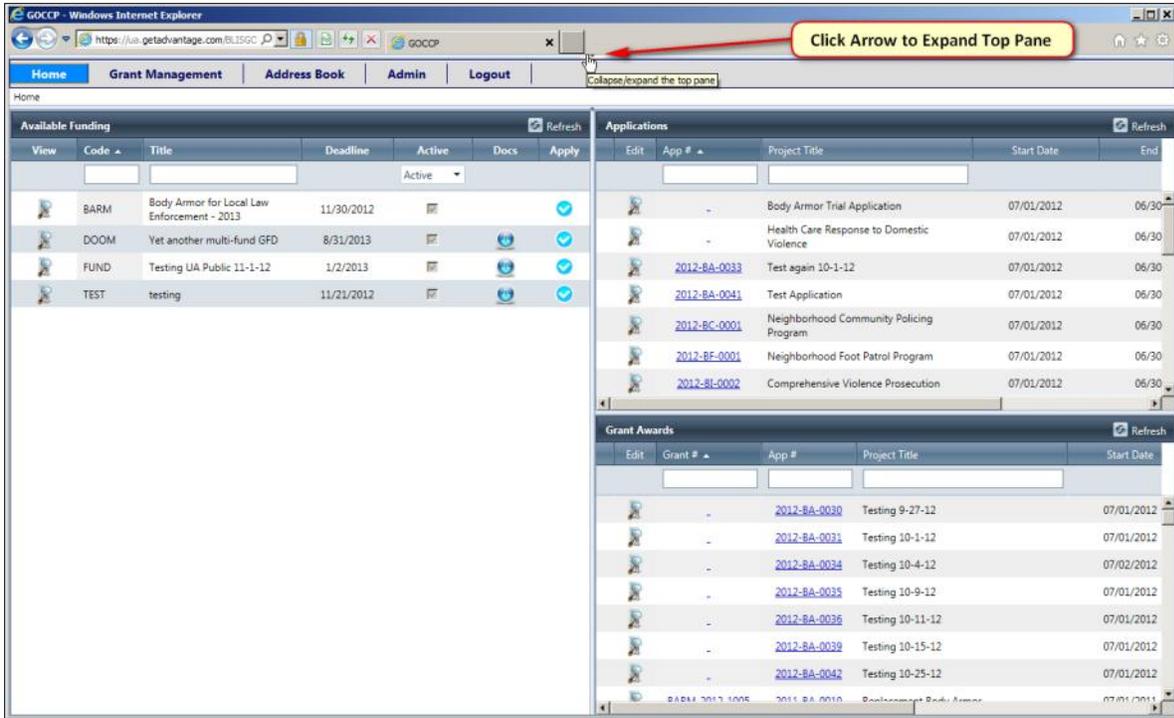


Figure 12 – Header Bar Hidden

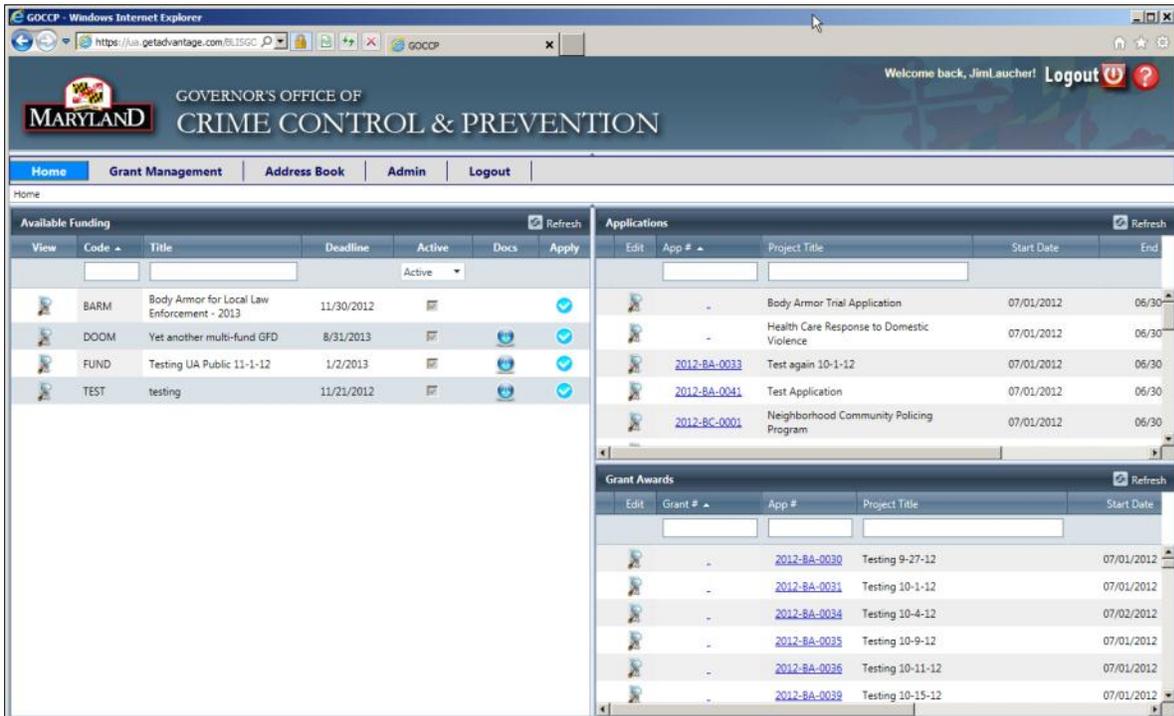


Figure 13 – Header Bar Shown

## 5.2.2 Navigation Menu Bar

The Navigation Menu Bar displays links to the different functional areas of GMS as menu and sub-menu items, and appears below the Header Bar on every screen in the GMS.



Figure 14 - GMS Navigation Menu Bar

Move your pointer over a menu item to highlight it. If a menu item has a sub-menu, it will automatically appear. When the menu or sub-menu item you wish to choose is highlighted, click the left mouse button.

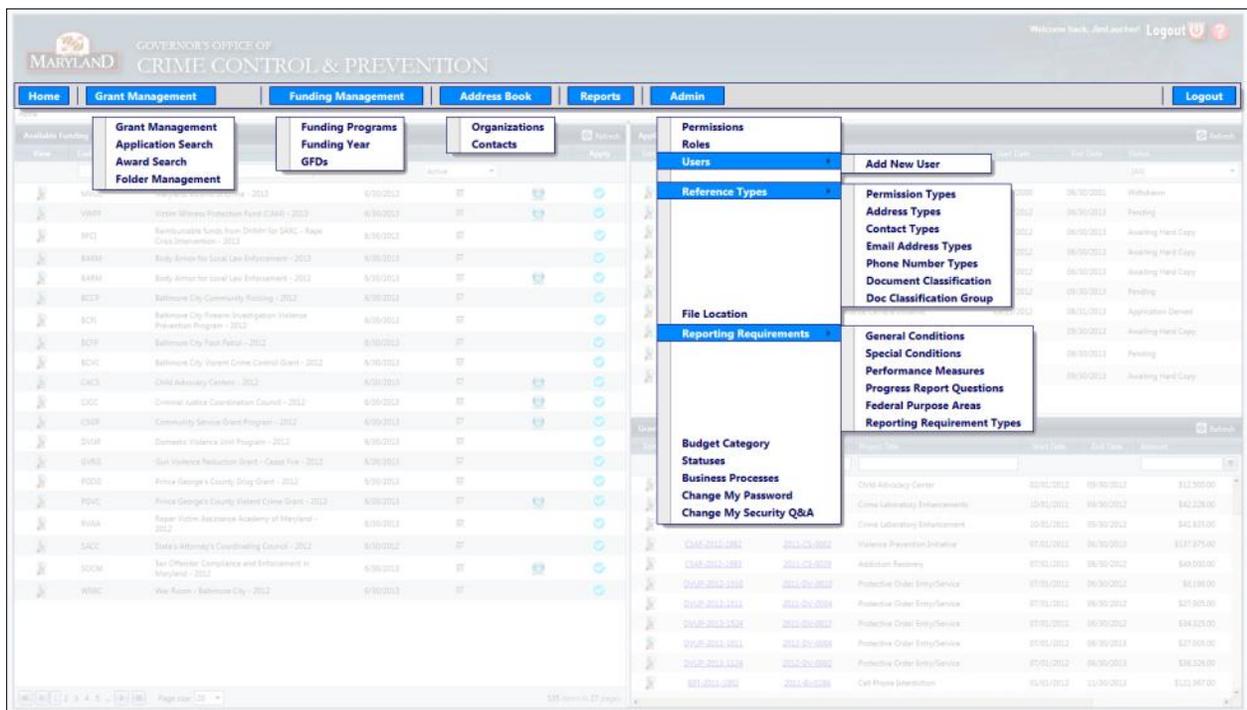


Figure 15 - Navigation Menu and Sub-Menu Items (Not all items are available to all users.)

**NOTE:** The menu and sub-menu items available to you depend upon the permissions assigned to your User ID. For example, a GOCCP Funding Manager will see the Funding Management menu & sub-menu, while an organization external to the GOCCP who is applying for a grant will not, and the Admin menu & sub-menu items will only be available to GOCCP and system administrators.

- Clicking *Home* on the Navigation Menu Bar will return you to your GMS Home Page from wherever you are in the system.
- Clicking *Logout* on the Navigation Menu Bar will log you out of GMS and return you to the GOCCP Home Page.

## 5.2.3 Location Bar

The Location Bar is a road map that shows you where you are within GMS. Like the Header Bar and Navigation Menu Bar, the Location Bar is fixed in place and appears on every GMS screen.

Grant Management > Application Search

Figure 16 - GMS Location Bar

- For example, if you select *Application Search* from the *Grant Management* menu, you are taken to the GMS Application Search screen and the location bar will be updated to indicate your new location within the system, as shown in Figure 16.

### 5.2.4 Process Area

The Process Area is located beneath the Location Bar and is the primary working area within GMS. Its appearance changes based on where you are in the system – every task that you perform in GMS has one or more screens associated with it, and those screens are displayed in the Process Area.

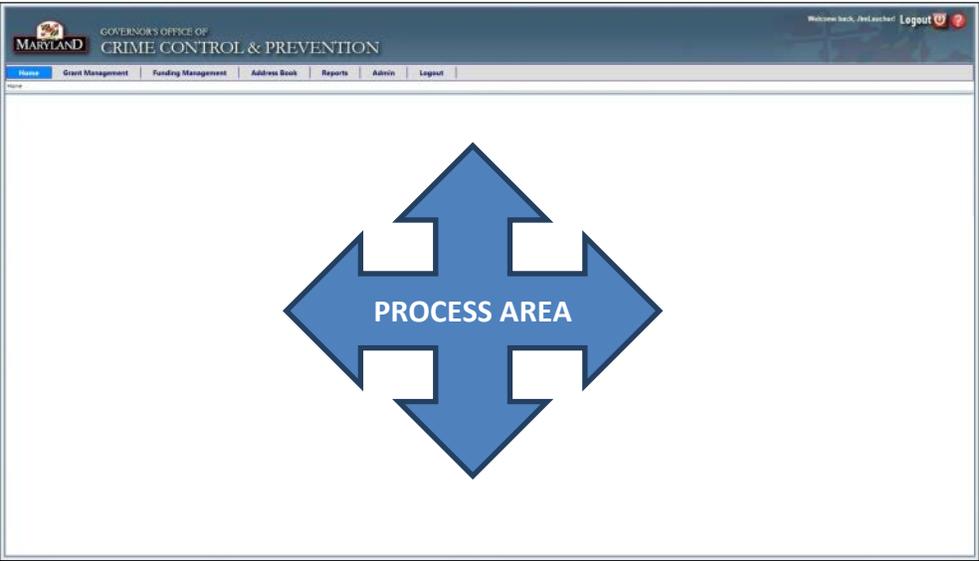


Figure 17 - GMS Process Area

## 5.2.4.1 Dashboards

The Process Area of your GMS Home Page is divided into three sections called Dashboards:

The screenshot displays three dashboards side-by-side. The 'Available Funding' dashboard on the left lists various funding opportunities with columns for Code, Title, Deadline, Action, Docs, and Apply. The 'Applications' dashboard in the middle shows a list of grant applications with columns for App #, Project Title, Start Date, End Date, and Status. The 'Grant Awards' dashboard on the right lists awarded grants with columns for Grant #, App #, Project Title, Start Date, End Date, and Amount. Each dashboard has a yellow callout box with its name: 'AVAILABLE FUNDING DASHBOARD', 'APPLICATIONS DASHBOARD', and 'GRANT AWARDS DASHBOARD'.

Figure 18 - GMS Home Page Dashboards

- The Available Funding Dashboard displays a list of current funding opportunities. The Applications Dashboard contains a list of grant applications your organization has created.
- The Grant Awards Dashboard displays a list of grants your organization has been awarded.

Each dashboard presents information in a format similar to a table or a spreadsheet – in rows and columns, and is made up of the following components shown in Figure 19:

The diagram shows a close-up of the 'Applications' dashboard with labels pointing to its components. The components are: Dashboard Header (Applications), Column Headings (Edit, App #, Project Title, Start Date, End Date, Status), Search/Filter Fields (input boxes and a dropdown menu), and Records (the data rows). The records shown are for application 2000-BR-0046 and 2012-BA-0033.

Figure 19 - GMS Home Page Dashboard Components

- **Dashboard Header:** Identifies the dashboard
- **Column Headings:** The columns determine which fields of a record are displayed. For example, a complete grant application record may contain over 20 fields of information, but in the Applications dashboard only the high-level information is shown (the Application Number, Project Title, Start Date, End Date, and Status fields). NOTE: You can sort the records in your dashboard by the column headings – refer to the section [Sorting Records in GMS](#) for instructions.
- **Search/Filter Fields:** Using these fields, you can search for specific records or narrow the list of records shown by creating a filter. Refer to the section [Filtering and Searching for Records in GMS](#) for instructions on searching and filtering records.

- **Records:** Individual funding opportunities, grant applications, or grant awards, depending on which dashboard you are viewing. Each record is displayed in its own row.
- **Action Columns:** Each dashboard may have one or more columns which display an icon in each record. In these columns, the fields do not contain information about a record, but rather allow you to perform an action on the record. For example, in the Application dashboard shown in Figure 19, the first column is the Edit action column; clicking the icon in that column in a specific row will allow you to edit that application.
- **Scroll Bars:** If a dashboard has more columns than will fit in the current frame, a horizontal scroll bar will appear. By moving your pointer over the scroll bar then clicking and holding the left mouse button down, you can drag the scroll bar to the right in order to view any columns that don't fit within the frame. The same is true for records – if the dashboard contains more rows than will fit in the frame, a vertical scroll bar will appear which will allow you to scroll up and down through the records.



Figure 20 - GMS Home Page Dashboard Scroll Bars

- **Resizable Frames:** Each dashboard is surrounded by a thin frame. You can change the number of columns or rows displayed in a dashboard by moving your pointer over the frame until it changes to the double-sided arrow, clicking and holding the left mouse button, dragging the frame to either side or up/down, then releasing the mouse button.

NOTE: You can re-size the width of any column by placing your pointer between columns in the Headings Section:



Figure 21 - Resize Dashboard Column Headings

- **Page Navigation Tool:** The Available Funding dashboard displays a tool at the bottom of the frame which allows you to change the number of records shown per page and easily navigate to any page. Figure 22 shows the action each button performs:

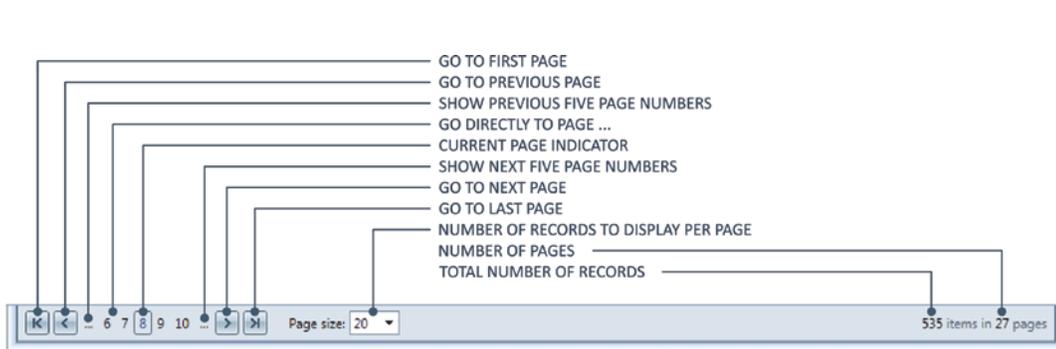


Figure 22 - Page Navigation Tool

This navigation tool is shown throughout GMS where there are many records to navigate (for example in the Application Search and Award Search screens).

- Control the number of records displayed in the current frame by clicking on the drop-down list beside Page Size and selecting 10, 20, or 50. The total number of records stays the same, but the number of pages (shown in the lower right side) updates based on how many records per page you select.
- Click on any of the navigation arrow boxes to move through the pages of records, or select a specific page by clicking on the page number as shown in Figure 22.

### 5.2.4.1.1 The Available Funding Dashboard

The Available Funding dashboard displays a list of funding programs (Notice of Funding Availability – NOFAs) that you can use to apply for a grant, as shown in Figure 23.

View	Code	Title	Deadline	Active	Docs	Apply
	CICC	Criminal Justice Coordination Council - 2012	6/30/2013	<input checked="" type="checkbox"/>		
	CSGP	Community Service Grant Program - 2012	6/30/2013	<input checked="" type="checkbox"/>		
	DVUP	Domestic Violence Unit Program - 2012	6/30/2013	<input checked="" type="checkbox"/>		

Figure 23 - GMS Home Page - Available Funding Dashboard

The following fields are shown in columns for each NOFA record:

**View:** Click the magnifying glass icon in this column to display a popup window the basic parameters of the funding program as shown in Figure 24, including a Summary, Start and End Date, Grant Application Deadline Dates, and Eligibility Requirements.



Figure 24 - NOFA Basic Parameter Information Pop-up Window

- Code:** A 4-letter code assigned by GOCCP to each funding opportunity.
- Title:** The title of the NOFA – the name of the funding program and the funding year.
- Deadline:** The date that all grant applications based on the NOFA must be submitted by.
- Active:** The checkbox in this column indicates whether or not the NOFA is currently active. To view only NOFA records that are active, select *Active* from the drop-down box directly beneath the column heading.
- Docs:** A blue marble icon is shown in this field if a NOFA has supporting documentation associated with it. Click on the icon to download and review the document.
- Apply:** Click on the checkmark icon in this field to create an application for a grant based on this NOFA. Refer the section [Apply for a Grant](#) for detailed instructions.

You can sort/filter and search for records shown in this dashboard using the column headings and fields directly below them. Refer to the section [Sorting, Filtering, and Searching for Records](#) for details.

### 5.2.4.1.2 The Applications Dashboard

The Applications Dashboard contains a list of grant applications your organization has created. NOTE: Applications that you submitted, which have been approved and awarded to your organization, are not shown in this dashboard.

Edit	App #	Project Title	Start Date	End Date	Status
	<input type="text"/>	<input type="text"/>			[All]
	<a href="#">2000-BR-0046</a>	Part-time Police Activity League (PAL) Coordinator	07/01/2000	06/30/2001	Withdrawn
	<a href="#">2012-BA-0033</a>	Juvenile Courts Victim Specialist	07/01/2012	06/30/2013	Pending
	<a href="#">2012-BC-0001</a>	Neighborhood Community Policing Program	07/01/2012	06/30/2013	Awaiting Hard Copy
	<a href="#">2012-BF-0001</a>	Neighborhood Foot Patrol Program	07/01/2012	06/30/2013	Awaiting Hard Copy

Figure 25 - GMS Home Page - Applications Dashboard

The following fields are shown in columns for each Application record:

**Edit:** Click the magnifying glass icon in this column to view/edit an application’s contents. You will leave your GMS home page and be taken to the Grant Application Menu where you can continue working on the application.

The screenshot shows the 'Grant Application Menu' for application 2000-BR-0046. It includes sections for:

- PROJECT TITLE:** Part-time Police Activity League (PAL) Coordinator
- APPLICANT AGENCY:** Juvenile Courts Victim Specialist
- IMPLEMENTING AGENCY:** Neighborhood Community Policing Program
- PROJECT DATES:** GPD Code, GPD Title, GPD Start Date, GPD End Date, Proposed Start Date, Proposed End Date
- FUNDING YEAR:** Program Year
- PREPARER INFORMATION:** Preparer's Name, Preparer's Phone
- AUDIT REQUIREMENTS:** A note about audit requirements.

Figure 26 - Grant Application Menu

- Refer to the section **Apply for a Grant** for detailed instructions on how to use this screen.
- You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

**App #:** The unique identifier code assigned to an application when you create it. The format represents the year you applied, the funding application code and a four-digit system generated number. The application number is underlined; click on it to view summary information about the application, as shown in Figure 27.



Figure 27 - Application Summary Popup

- Project Title:** The title your organization provided for the grant application when creating it.
- Start Date:** The date the project will start (defined by NOFA).
- End Date:** The date the project will end (defined by NOFA).
- Status:** Shows the status of each grant application in the dashboard. Each application shown in the dashboard will be in one of the following four statuses:
- **Pending:** The application is still in progress and has not yet been submitted.
  - **Pending Revision:** The application was submitted but returned to the applicant for revision.
  - **Awaiting Hardcopy:** The application has been submitted electronically and the GOCCP is currently awaiting the paper copy.

You can sort/filter and search for records shown in this dashboard using the column headings and fields directly below them. Scrolling up/down or left/right is available to access all information provided. For example, you can filter the list of records to only display those with a status of *Awaiting Hardcopy*. Refer the section [Sorting, Filtering, and Searching for Records](#) for details.

The Applications dashboard does not show applications that have been approved and awarded as grants. However, you can view all applications your organization has created regardless of status using the Application Search feature of GMS.

From your GMS Home Page, select Application Search from the Grant Management menu:



Figure 28 - Access the Application Search Feature

This displays the Application Search screen, which is a more detailed listing than shown in the Applications dashboard:

App #	App Name	Implementing Agency	Project Title	Start Date	End Date	Project Manager	Amount	County	Status
2010-09-20-06	Baltimore County Hospital	Baltimore County Police Department	Baltimore County - Elder Abuse Protocol - Community Training	11/01/2010	11/01/2010	Roger Clarke	\$79,421.00	Baltimore County	Awarded
2010-09-20-07	Baltimore County Hospital	Baltimore County Police Department	Baltimore Co. - Anti-Bullying - Community Training	11/01/2010	11/01/2010	Spencer Lee	\$49,100.00	Baltimore County	Awarded
2010-09-20-08	Baltimore County Hospital	Baltimore County Department of Health	Baltimore Co. - Recreational Youth Program	09/01/2010	08/31/2011	Girshak, Michael	\$28,210.00	Baltimore County	Awarded
2010-09-20-09	Baltimore County Hospital	Baltimore County Department of Health	Baltimore Co. - Recreational Youth Program - Summer Session	08/01/2010	08/31/2010	Girshak, Michael	\$17,747.00	Baltimore County	Awarded
2010-09-20-10	City of Baltimore	Office of the State Attorney for Baltimore City	Whistle, Anti-Corruption and Economic Development Initiative	01/01/2010	12/31/2010	Wood, Aar	\$20,000.00	Baltimore City	Awarded
2010-09-20-11	Frederick City Police Department	Frederick City Police Department	Domestic Violence Protective Order Dry & Spray Paint	11/01/2010	11/01/2010	Bel, Vanessa	\$18,000.00	Frederick	Awarded
2010-09-20-12	City of Baltimore	Baltimore Police Department	Baltimore Domestic Violence Protective Order Dry & Spray Paint	10/01/2010	10/01/2010	Taly, Amber	\$17,000.00	Baltimore City	Awarded
2010-09-20-13	Baltimore Police Department	Baltimore Police Department	Domestic Violence Court Liaison Program	11/01/2010	11/01/2010	Hecker, Margaret	\$40,000.00	Baltimore City	Awarded
2010-09-20-14	Baltimore County Hospital	Baltimore County Police Department	Baltimore County - Youth - Anti-Corruption - Support for Anti-Bullying Program	08/01/2010	08/01/2010	Vaughan, Stephen	\$40,000.00	Baltimore County	Awarded
2010-09-20-15	Baltimore County Hospital	Baltimore County Department of Health	Baltimore County - Youth - Anti-Corruption - Support for Anti-Bullying Program	08/01/2010	08/01/2010	Girshak, Michael	\$13,314.00	Baltimore County	Awarded
2010-09-20-16	Baltimore County Hospital	Community Conservation Office	Baltimore County - Wilderness - Community Training	05/01/2010	05/01/2010	Robb, Harold	\$18,000.00	Baltimore County	Awarded
2010-09-20-17	Baltimore County Hospital	Baltimore County Police Department	Baltimore County - Wilderness - Community Training	05/01/2010	05/01/2010	Wade, Richard	\$17,917.00	Baltimore County	Awarded
2010-09-20-18	Baltimore County Hospital	Baltimore County Department of Health	Baltimore County - Wilderness - Community Support for Anti-Bullying Program	05/01/2010	05/01/2010	Girshak, Michael	\$13,314.00	Baltimore County	Awarded
2010-09-20-19	Baltimore County Hospital	Community Conservation Office	Baltimore County - Wilderness - Community Training	05/01/2010	05/01/2010	Engler, Tim	\$18,000.00	Baltimore County	Awarded
2010-09-20-20	Baltimore County Hospital	Baltimore County Police Department	Baltimore County - Wilderness - Community Support for Anti-Bullying Program	05/01/2010	05/01/2010	Suber, Catherine	\$14,000.00	Baltimore County	Awarded
2010-09-20-21	Baltimore County Hospital	Baltimore County Department of Health	Baltimore County - Wilderness - Community Support for Anti-Bullying Program	05/01/2010	05/01/2010	Girshak, Michael	\$13,314.00	Baltimore County	Awarded
2010-09-20-22	City of Baltimore	Frederick City Police Department	Baltimore County - Wilderness - Community Support for Anti-Bullying Program	05/01/2010	05/01/2010	Travis, Patricia	\$44,223.00	Frederick	Awarded
2010-09-20-23	City of Baltimore	Baltimore Police Department	Domestic Violence Intervention Program	08/01/2010	07/01/2011	Chapman, Edward	\$6,000.00	Baltimore City	Awarded
2010-09-20-24	City of Baltimore	Frederick City Police Department	Domestic Violence Intervention Program - Feedback Survey	11/01/2010	10/31/2010	Hoffman, Lyle	\$62,400.00	Frederick	Awarded
2010-09-20-25	City of Frederick	Frederick City Police Department	Domestic Violence Intervention Program - Feedback Survey	11/01/2010	10/31/2010	Hoffman, Lyle	\$40,000.00	Frederick	Application Denied

Figure 29 - Application Search Screen

You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

5.2.4.1.3 The Grant Awards Dashboard

The Grant Awards dashboard displays a list of grants your organization has been awarded.

Edit	Grant #	App #	Project Title	Start Date	End Date	Amount	Status
	<input type="text"/>	<input type="text"/>	<input type="text"/>			<input type="text"/>	[All]
	<a href="#">GVRG-2013-1910</a>	<a href="#">2012-GV-0020</a>	Overtime Support	07/01/2012	06/30/2013	\$40,000.00	Award Packets Pending
	<a href="#">GVRG-2013-1940</a>	<a href="#">2012-GV-0021</a>	Personnel Support	07/01/2012	06/30/2013	\$84,875.00	Award In Compliance
	<a href="#">JARG-2009-1101</a>	<a href="#">2011-JG-0003</a>	Juvenile Drug Court	07/01/2011	06/30/2012	\$131,965.00	Acceptance Documents Due
	<a href="#">JINT-2009-1304</a>	<a href="#">2011-JG-0022</a>	Respondent Notification	07/01/2011	06/30/2012	\$32,839.00	Acceptance Documents Due

Figure 30 - GMS Home Page - Grant Awards Dashboard

The following fields are shown in columns for each Grant Award record:

**Edit:** Click the magnifying glass icon in this column to view/edit an award. You will leave your GMS home page and be taken to the Grant Award Menu where you can manage the award and perform programmatic and financial reporting.



Figure 31 - Edit Grant Award Information

- Refer to the section **Maintaining Grant Awards** for detailed instructions on how to use this screen.
- You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

**Grant #:** The unique identifier code assigned to a grant when it is awarded. The grant award number is underlined; click on it to view summary information about the award.

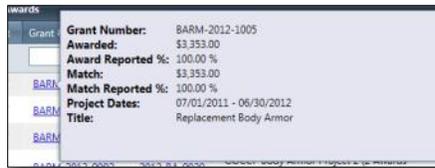


Figure 32 – Grant Award Summary PopUp

**App #:** The application number of the application that the grant award was based on. The application number is underlined; click on it to view summary information about the application for this grant award.



Figure 33 - Application Summary PopUp for a Grant Award

- Project Title:** The title of the awarded grant.
- Start Date:** The start date of the grant award.
- End Date:** The end date of the grant award.
- Amount:** The grant funds awarded to the grant.
- Status:** Shows the status of each grant award in the dashboard. Each award shown in the dashboard will be in one of the following three statuses:
- **Acceptance Documents Due:** The grant has been awarded and the GOCCP is currently awaiting the acceptance documents from your organization.
  - **Award in Compliance:** The grant award terms are currently satisfied.

- **Award Not in Compliance:** The grant award terms are currently not satisfied – often this indicates that financial and programmatic reports are overdue.

You can sort/filter and search for records shown in this dashboard using the column headings and fields directly below them. For example, you can filter the list of records to only display those with a status of *Award Not in Compliance*. Refer to the section *Sorting, Filtering, and Searching for Records* for details.

The Grant Awards dashboard does not show awards that have been closed, or are in a status other than the three described above. However, you can view all awards your organization has received regardless of status by using the Award Search feature of the GMS.

From your GMS Home Page, select Award Search from the Grant Management menu:



Figure 34 - Access the Award Search Feature

This displays the Award Search screen, which is a more detailed listing than shown in the Grant Awards dashboard:

Agency	Agency Name	Project Title	Start Date	End Date	Project Director	Amount	County	Status
Baltimore County	Baltimore County Police Department	Baltimore County - Widespread Profound Community Policing	12/01/2018	12/31/2018	Mark Clarke	175,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Police Department	Baltimore County - Widespread Profound Community Policing	12/01/2018	12/31/2018	Scott Lutz	160,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Department of Health	Baltimore County - Baltimore High Performance	09/01/2018	08/31/2019	Gracie Michael	120,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Department of Health	Baltimore County - Resilient, Ready to Thrive	08/01/2018	08/31/2019	Gracie Michael	125,747.00	Baltimore County	Awarded
City of Baltimore	Office of the Mayor's Advisory Committee	Widening, Improving and Modernizing Baltimore's Public Transit	01/01/2018	12/31/2018	Wanda Aze	120,000.00	Baltimore County	Awarded
Frederick City	Frederick City Police Department	Domestic Violence Response Order Drug & Court Case	11/01/2018	10/31/2018	Red Hennessy	618,000.00	Frederick	Awarded
City of Baltimore	Baltimore Police Department	Baltimore Domestic Violence Response Order Drug & Court Case	10/01/2018	09/30/2018	Taty Hester	617,500.00	Baltimore City	Awarded
Baltimore Police Department	Baltimore Police Department	Domestic Violence Response Order Drug & Court Case	10/01/2018	10/31/2018	Patricia Huggins	600,000.00	Baltimore City	Awarded
Baltimore County	Baltimore County Police Department	Baltimore County - South Beach Community Support for Addiction	08/01/2018	08/31/2018	Stephanie Neenan	145,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Department of Health	Baltimore County - South Beach Community Support for Addiction	08/01/2018	08/31/2018	Gracie Michael	122,240.00	Baltimore County	Awarded
Baltimore County	Community Connection Office	Baltimore County - Widespread Community Mobilization	05/01/2018	05/31/2018	Mark Hester	130,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Police Department	Baltimore County - Widespread Community Mobilization	05/01/2018	05/31/2018	Mark Hester	117,710.00	Baltimore County	Awarded
Baltimore County	Baltimore County Department of Health	Baltimore County - Widespread Community Support for Addiction Services	05/01/2018	05/31/2018	Gracie Michael	110,000.00	Baltimore County	Awarded
Baltimore County	Community Connection Office	Baltimore County - Widespread Community Mobilization	05/01/2018	05/31/2018	Kristina Tarr	110,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Police Department	Baltimore County - Widespread Community Mobilization	05/01/2018	05/31/2018	Brian Lammert	100,000.00	Baltimore County	Awarded
Baltimore County	Baltimore County Police Department	Baltimore County - Widespread Community Support for Addiction Services	05/01/2018	05/31/2018	Gracie Michael	100,000.00	Baltimore City	Awarded
City of Frederick	Frederick City Police Department	Frederick City - Widespread Community Support for Addiction Services	05/01/2018	04/30/2018	Chris Parris	100,000.00	Frederick	Awarded
City of Baltimore	Baltimore Police Department	Baltimore County - Widespread Community Support for Addiction Services	05/01/2018	04/30/2018	Christina Howard	90,000.00	Baltimore City	Awarded
City of Frederick	Frederick City Police Department	Frederick City - Widespread Community Support for Addiction Services	11/01/2018	10/31/2018	Matthew Lutz	142,400.00	Frederick	Awarded
City of Frederick	Frederick City Police Department	Frederick City - Widespread Community Support for Addiction Services	07/01/2018	06/30/2018	Matthew Lutz	142,400.00	Frederick	Awarded

Figure 35 - Award Search Screen

You can return to your home page and dashboards at any time by clicking Home on the Navigation Menu Bar.

### 5.3 Sorting, Filtering, and Searching for Records

The screens, as well as the columns available to you, will vary based on your permissions as a GMS user, but the procedures described in this section work the same way in every area of GMS that presents a list of records, including the Home Page dashboards and the Application and Award Search screens.

The Award Search screen is used for the examples in this section. GOCCP personnel can use this screen to search for all grants awarded through the agency, while external organizations (sub-recipients) will see only grants that have been awarded to their organization.

Edit	Reports	Grant #	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Project Director	Amount	County	Monitor	Status
		BAL-2005-1006	2005-BA-0030	Baltimore Police Department	Baltimore Police Department	Neighborhood Community Policing Program	07/01/2005	06/30/2011	Goldstein, Sheryl	\$2,974,000.00	Baltimore City	Weems, Zina	Award Closed
		BAL-2012-1301	2011-BA-0005	Baltimore Police Department	Baltimore Police Department	Neighborhood Community Policing	07/01/2011	06/30/2012	Goldstein, Sheryl	\$1,974,000.00	Baltimore City	Melvin, Sharon	Award In Compliance
		BAL-2008-2001	2009-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution (CVP-State)	07/01/2009	06/30/2009	Ludwig, Doug	\$1,875,000.00	Baltimore City	Ingram, Herman	Award Closed
		BAL-2007-1001	2006-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution (CVP-State)	07/01/2006	06/30/2007	Ludwig, Doug	\$1,985,000.00	Baltimore City	Carpentier, Argee	Award Closed
		BAL-2008-1301	2007-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution (CVP-State)	07/01/2007	06/30/2008	Ludwig, Doug	\$1,985,000.00	Baltimore City	Arnold, Debra	Award Closed
		BAL-2009-1401	2009-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution (CVP-State)	07/01/2009	06/30/2009	Fraling, Matthew	\$1,950,961.81	Baltimore City	Ingram, Herman	Award Closed
		BAL-2009-1501	2009-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution (CVP-State)	07/01/2009	06/30/2009	Fraling, Matthew	\$1,950,025.60	Baltimore City	Weems, Zina	Award Closed
		BAL-2011-1301	2010-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	07/01/2010	06/30/2011	Glass, Julie	\$1,959,195.00	Baltimore City	Weems, Zina	Award Closed
		BAL-2012-1301	2011-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	07/01/2011	06/30/2012	Glass, Julie	\$1,959,195.00	Baltimore City	Melvin, Sharon	Award In Compliance
		BAL-2013-1301	2012-BA-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	07/01/2012	06/30/2013	Solomon, Gregg	\$1,959,195.00	Baltimore City	Melvin, Sharon	Acceptance Documents Due
		BAL-2006-1001	2004-BA-0001	Baltimore Police Department	Baltimore Police Department	Neighborhood Foot Patrol Program	07/01/2004	06/30/2005	Amrose, Edward	\$2,800,000.00	Baltimore City	Teewey, John	Award Closed
		BAL-2006-2001	2005-BA-0001	City of Baltimore	Baltimore Police Department	Baltimore City - Neighborhood Foot Patrol Program	07/01/2005	06/30/2006	Mahoney, Kristen	\$2,700,000.00	Baltimore City	Ingram, Herman	Award Closed
		BAL-2007-2001	2006-BA-0001	City of Baltimore	Baltimore Police Department	Baltimore City - Neighborhood Foot Patrol Program	07/01/2006	06/30/2007	Goldstein, Sheryl	\$2,793,796.24	Baltimore City	Carpentier, Argee	Award Closed
		BAL-2008-2401	2007-BA-0001	Baltimore Police Department	Baltimore Police Department	Baltimore City - Neighborhood Foot Patrol Program	07/01/2007	06/30/2008	Goldstein, Sheryl	\$2,800,000.00	Baltimore City	Arnold, Debra	Award Closed
		BAL-2009-2501	2008-BA-0001	Baltimore Police Department	Baltimore Police Department	Neighborhood Foot Patrol Program	07/01/2008	06/30/2009	Goldstein, Sheryl	\$2,800,000.00	Baltimore City	Ingram, Herman	Award Closed
		BAL-2010-2401	2009-BA-0001	Baltimore Police Department	Baltimore Police Department	Neighborhood Foot Patrol	07/01/2009	06/30/2010	Goldstein, Sheryl	\$2,763,800.00	Baltimore City	Weems, Zina	Award Closed
		BAL-2011-2301	2010-BA-0001	Baltimore Police Department	Baltimore Police Department	Neighborhood Foot Patrol	07/01/2010	06/30/2011	Goldstein, Sheryl	\$2,763,800.00	Baltimore City	Weems, Zina	Award Closed
		BAL-2012-2301	2011-BA-0001	Baltimore Police Department	Baltimore Police Department	Neighborhood Foot Patrol	07/01/2011	06/30/2012	Goldstein, Sheryl	\$2,763,800.00	Baltimore City	Melvin, Sharon	Award In Compliance
		BAL-2005-1001	2004-BA-0001	Baltimore Police Department	Baltimore Police Department	Violent Crime Reduction Through Drug Interdiction Initiative	07/01/2004	06/30/2005	Amrose, Edward	\$2,084,500.00	Baltimore City	Teewey, John	Award Closed
		BAL-2006-1001	2005-BA-0001	City of Baltimore	Baltimore Police Department	Violent Crime Reduction Through Drug Interdiction Initiative	07/01/2005	06/30/2006	Mahoney, Kristen	\$2,018,587.00	Baltimore City	Teewey, John	Award Closed
		BAL-2008-1301	2008-BA-0001	Baltimore Police Department	Baltimore Police Department	Violent Crime Reduction - Drug Interdiction Initiative	07/01/2008	06/30/2009	Goldstein, Sheryl	\$2,500,000.00	Baltimore City	Ingram, Herman	Award Closed
		BAL-2010-1901	2009-BA-0001	Baltimore Police Department	Baltimore Police Department	Violent Crime Reduction - Drug Interdiction Initiative	07/01/2009	06/30/2010	Goldstein, Sheryl	\$2,454,677.00	Baltimore City	Weems, Zina	Award Closed

Figure 36 - Sorting, Filtering, and Searching using the Award Search Screen

### 5.3.1 Sorting Records in GMS

Record lists can be sorted by a column in ascending order (A at the top, Z at the bottom), descending order (Z at the top, A at the bottom) or not at all. If a scrollbar is present at the bottom or to the right, there are additional items to select from.

When a list is sorted by a column, a small white arrow is displayed to the right of the column heading text.

- If the arrow points upward, the list is sorted by the values in this column in ascending order.
- If the arrow points downward, the list is sorted by the values in this column in descending order.
- If there is no arrow beside the column heading text, the list is not sorted by the values in this column.



Figure 37 - Click Column Heading Text to Sort

If a listing of records in GMS is sorted by default, the arrow right is displayed immediately when you first access the screen. In Figure 37 the grant awards list is sorted by Grant Number, in ascending order, by default.

To sort your list by a specific column:

1. Move your pointer directly over the text description in the column heading until it changes into the hand shape.
2. Click the left mouse button.
3. Click again to change the sort order from ascending to descending, and once again to remove the column from sorting.

By clicking on the text description in a column heading repeatedly, you can cycle through sorting your list by that column in ascending order, descending order, or not at all.

### 5.3.1.1 Additive Sorting

You can sort your list of records by more than one column. For example, to sort all grant awards by End Date (most recent first), and sort those results by Status, do the following:

1. Click the End Date column heading once to sort the list in ascending order
2. Click End Date again to sort in descending order
3. Click the Status column heading once to sort in ascending order

Notice in Figure 32 the descending arrow beside the End Date column heading and the ascending arrow beside the Status column heading.

Project Title	Start Date	End Date	Project Director	Amount	County	Monitor	Status
Phone Interdiction	01/01/2012	11/30/2013	Hitchner, Kristen	\$121,067.00	Baltimore City	Melvin, Sharron	Award In Compliance
Comprehensive Violence Prosecution	07/01/2012	06/30/2013	Solomon, Gregg	\$1,959,195.00	Baltimore City	Melvin, Sharron	Acceptance Documents Due
Street Patrols/Public Awareness	08/01/2012	06/30/2013	Wilson, Woodland	\$30,000.00	Baltimore County	Eaddy, Latonya	Acceptance Documents Due
Victim Advocate	07/01/2012	06/30/2013	Widgeon, Pamela	\$17,500.00	Baltimore City	Melvin, Sharron	Award In Compliance
ng 10-11-12	07/01/2012	06/30/2013	Bell, Veronica	\$11.00	Frederick	Cesar, Olga	Award In Compliance
ng 10-15-12	07/01/2012	06/30/2013	Bell, Veronica	\$1.00	Frederick	Carpintieri, Angee	Award In Compliance
ng 10-1-12	07/01/2012	06/30/2013	Bell, Veronica	\$100.00	Frederick	Finley, Michael	Award In Compliance
Crime Prevention Initiative	07/01/2011	06/30/2013	Cohen, Evan	\$137,975.00	Baltimore County	Eaddy, Latonya	Award In Compliance

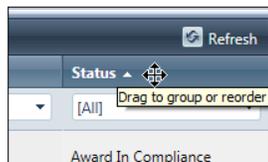
Figure 38 - Grant Award List Sorted by End Date (Descending) and Status (Ascending)

The result is a list of all the grant awards sorted by end date, where all the awards with the same end date are sorted by status.

### 5.3.1.2 Reordering Columns

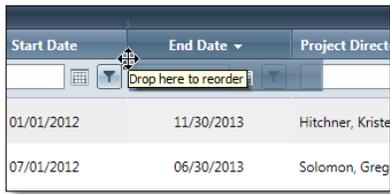
At times you may wish to see one column beside another to make viewing pertinent information easier. Using the example from Figure 38, to move the Status column in front of the End Date column:

1. Move your pointer into the heading of the Status column until your pointer changes to the 4-way directional arrow.

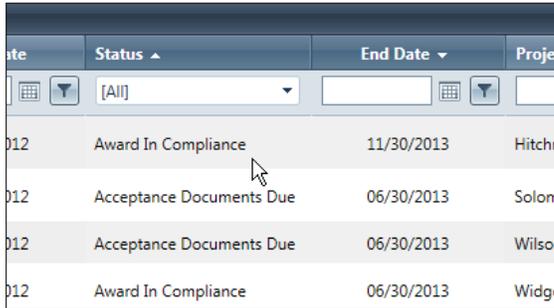


2. When your pointer changes to this shape, click and hold your mouse button down.

3. Drag the column to its desired location until you see the text popup that says Drop Here To Reorder.



4. Release the mouse button. The column will appear in the new location.



*It's important to note that by re-ordering columns, you have not changed how the list was sorted.* In this example, the list was sorted first by End Date, then by Status. Even though the Status column was moved in front of the End Date column, the list is still sorted first by the End Date, then within those results, by Status.

### 5.3.1.3 Clearing the Sort

Additive (multi-column) sorting in GMS is a powerful tool that can help you view data exactly the way you want, and it can also produce complex results.

If the results of a multi-column sort don't display the anticipated data, look at all the column headings and make sure only the columns you wish to sort by contain an ascending or descending arrow beside the heading text.

- If you sort by a column, the records will continue to be sorted by that column until you clear it by clicking on the heading text until the sort arrow disappears.
- For example, from the sort shown in Figure 37 above, the Grant Award Search screen is automatically sorted ascending by Grant#. By not clearing Grant# as a sort column first, the actual result of that sort would be the list of records sorted first by Grant#, then End Date, then Status as shown below – instead of just End Date then Status.

Grant #	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	Status	End Date
8CF-2012-1801	2012-BF-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	07/01/2012	Acceptance Documents Due	06/30/2013
SBSE-2013-1521	2012-SE-0047	Baltimore County, Maryland	Baltimore County Police Department	Targeted Patrols/Public Awareness	08/01/2012	Acceptance Documents Due	06/30/2013
-	2012-BA-0034	Frederick City Police Department	Frederick City Police Department	Testing 10-4-12	07/02/2012	Award In Compliance	06/29/2013
-	2012-BA-0030	Frederick City Police Department	Frederick County Board of Education	Testing 9-27-12	07/01/2012	Award In Compliance	06/29/2013
-	2012-BA-0036	Frederick City Police Department	Frederick City Police Department	Testing 10-11-12	07/01/2012	Award In Compliance	06/30/2013
-	2012-BA-0039	Frederick City Police Department	Frederick County Board of Education	Testing 10-15-12	07/01/2012	Award In Compliance	06/30/2013
-	2012-BA-0031	Frederick City Police Department	Frederick County Department of Social Services	Testing 10-1-12	07/01/2012	Award In Compliance	06/30/2013

## 5.3.2 Filtering and Searching for Records in GMS

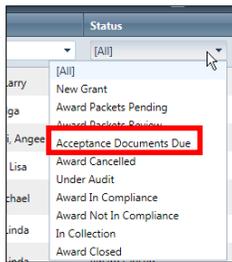
In addition to sorting, you can use filtering to find specific records or to narrow the list down based on criteria that you can type in or select from a drop-down list.

Any columns that you can use to filter your list have a white text box directly below the column heading. Boxes that have an arrow in them are drop-down lists with specific values in them that you can select.

### 5.3.2.1 Filtering by Selecting Values from a Drop-down List

For example, if you want to see all grant awards in your list which have a status of Acceptance Documents Due:

1. Click on the arrow on the drop-down box under the Status column heading.
2. Click on Acceptance Documents Due in the list.



This has filtered the list so that now the only records displayed are those that have a status of Acceptance Documents Due:

Project Title	Start Date	Status	End Date	Project Director
		Acceptance Documents Due		
Comprehensive Violence Prosecution	07/01/2012	Acceptance Documents Due	06/30/2013	Solomon, Gregg
Targeted Patrols/Public Awareness	08/01/2012	Acceptance Documents Due	06/30/2013	Wilson, Woodland

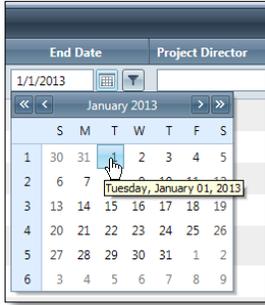
Figure 39 - Grant Award Records Filtered by Status

**Important:** Note that the results of the filter shown in Figure 39 are still being sorted by the End Date and Status columns as shown in the previous example (Figure 38). This is another example of *additive* sorting and filtering – the records were originally sorted by End Date, then Status and lastly filtered to show only one status.

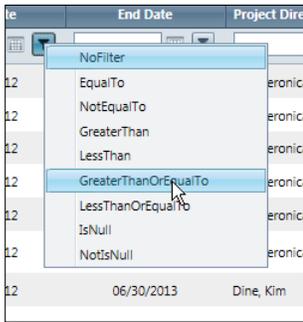
### 5.3.2.2 Filtering using Dates

Filtering by Date is a two step process. For example, to see all grants that were awarded that end on or after January 1<sup>st</sup> 2013:

1. Type **1/1/2013** into the date box below the End Date column heading, or alternatively choose the date by clicking on the calendar icon, navigating to the month and year, and selecting the day.



2. Click the filter icon beside the calendar and click on GreaterThanOrEqualTo in the list.

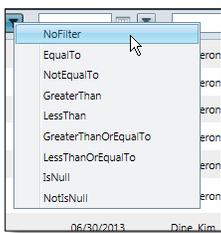


This has filtered the list so that now the only records displayed are those that have an End Date of 1/1/2013 or later.

Sorts	Grant #	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date
							1/1/2013
	BARM-2013-1301	2012-BA-0032	Frederick City Police Department	Frederick City Police Department	Testing 10-1-12 v2	07/01/2012	06/30/2013
	BCFI-2013-1801	2012-BR-0001	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	07/01/2012	06/30/2013
	CSAF-2012-1992	2011-CS-0002	Baltimore County, Maryland	Baltimore County Police Department	Violence Prevention Initiative	07/01/2011	06/30/2013
	DVIP-2013-1011	2012-DV-0004	Baltimore County, Maryland	Baltimore County Police Department	Protective Order Entry/Service	07/01/2012	06/30/2013
	DVIP-2013-1124	2012-DV-0002	Baltimore Police Department	Baltimore Police Department	Protective Order Entry/Service	07/01/2012	06/30/2013
	EFJ-2011-1002	2011-BJ-0186	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Cell Phone Interdiction	01/01/2012	11/30/2013
	GVRS-2013-1012	2012-GV-0004	Baltimore County, Maryland	Baltimore County State's Attorney's Office	Prosecution Support	07/01/2012	06/30/2013
	GVRS-2013-1715	2012-GV-0012	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	Project EXILE	07/01/2012	06/30/2013
	GVRS-2013-1910	2012-GV-0020	Baltimore County, Maryland	Baltimore County Police Department	Overtime Support	07/01/2012	06/30/2013
	GVRS-2013-1950	2012-GV-0021	Baltimore Police Department	Baltimore Police Department	Personnel Support	07/01/2012	06/30/2013

Figure 40 - Grant Award Records Filtered by End Date

To clear filter data from Date fields, you don't need to remove the date you typed in - just click on the filter icon and select No Filter.



### 5.3.2.3 Partial and Full Match Searching/Filtering

Any columns that you can use to search/filter your list have an empty white text box directly below the column heading.

- You can enter a full text string so that the resulting list contains only those records that contain the exact string in that column, or
- You can enter just a few characters so all records that contain those characters in that field will be displayed.

For example, if you are searching for a specific grant award and you don't know the Grant # but you know that the Project Title contains the word Advocacy, you can narrow the list of records as follows:

1. Type the word **Advocacy** into the text box beneath the Project Title column heading.

Project Title	Start
Advocacy	
Replacement Body Armor	07/01
Body Armor Replacement	07/01
GOCCP Body Armor Project	07/01
GOCCP Body Armor Project 2 (2 Awards)	

2. Press the Enter key to perform the search/filter.

This has filtered the list so that now the only records displayed are those that have the word Advocacy in the Project Title.

Implementing Agency	Project Title	Start Date
	Advocacy	
Baltimore County Department of Social Services	Child Advocacy Center	02/01/201
Office of the State's Attorney for Baltimore City	Domestic Violence Advocacy & Support	05/01/200
Office of the State's Attorney for Baltimore City	Domestic Violence Advocacy & Support	10/01/200
Office of the State's Attorney for Baltimore City	Domestic Violence Advocacy, Prosecution, and Support	02/01/201

Figure 41 - Grant Awards Filtered with Partial Match

NOTE: To clear a search, you must delete the text you typed into the filter field and press the Enter key. The resulting list will no longer be filtered by the text only *AFTER THE ENTER KEY IS PRESSED*.

### 5.3.3 Combining Sorting and Filtering

The following example illustrates combining sorting and filtering to produce exact search results. To see a list of Grant Award records, sorted by End Date (most recent first) for which the Implementing Agency contains Baltimore, the Project Title contains the word Armor, and the award End Date is on or after 1/1/2006, you would do the following:

1. Click on the Grant # column heading TWICE (by default, the list is sorted ascending by Grant # so you must click the heading twice to remove sorting by this column).

2. Type **Baltimore** into the text box below the Implementing Agency column heading.
3. Press the Enter Key.
4. Type **Armor** into the text box below the Project Title column heading.
5. Press the Enter Key
6. Type **1/1/2006** into the text box below the End Date column heading.
7. Click on the filter icon beside the calendar icon and select **GreaterThanOrEqualTo**.
8. Click on the End Date column heading TWICE (first click makes the sort Ascending, second makes it Descending).

MARYLAND GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION									
Home Grant Management Address Book Admin Logout									
Grant Management > Award Search									
Edit	Reports	Grant #	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Pro
					Baltimore	Armor		1/1/2006	
		<a href="#">BARM-2012-1719</a>	<a href="#">2011-BA-0012</a>	Baltimore County, Maryland	Baltimore County Police Department	Body Armor Replacement	07/01/2011	06/30/2012	Woc
		<a href="#">BARM-2012-1005</a>	<a href="#">2011-BA-0010</a>	Baltimore County, Maryland	Baltimore County Sheriff's Office	Replacement Body Armor	07/01/2011	06/30/2012	Brou
		<a href="#">BARM-2006-1013</a>	<a href="#">2005-BA-0013</a>	Baltimore Police Department	Baltimore Police Department	Body Armor for Baltimore Police Department	07/01/2005	06/30/2006	Mat

Figure 42 - Grant Award List - Multicolumn Filter and Sort

## 6 Funding Management (Accessibility based on permissions)

### 6.1 Introduction

The Funding Management process makes Federal and State dollars awarded to GOCCP available in the GOCCP GMS for specific programs and/or projects throughout the State of Maryland. GOCCP traditionally initiated funding in the form of Notice of Funding Availability documents. While NOFAs will still exist, they will be preceded by a GFD (Grant Funding Distribution) which will allocate the funding for each relative NOFA.

GFDs are made available to sub-recipients in the Available Funding Dashboard of the GMS home screen, which will provide parameters of the available funds. Each GFD has a NOFA document attached to it that sub-recipients can view for details and application requirements.

### 6.2 Funding Programs

#### 6.2.1 Create a Funding Program

Creating a new Funding Program is the first step to creating a record of monies administered by GOCCP.

##### 6.2.1.1 Add a New Funding Program Record

1. From the Funding Programs list, click on the *Add new record* link in the upper left hand corner of the Funding program process area, above the column headers.



Upon clicking *Add new record*, a data entry screen appears:

Figure 43 - Create New Funding Program – Initial Data Entry Screen

2. Complete each field in the initial data entry screen for the new Funding Program as follows:

- Grant Code – Internally defined Grant code (Required)
- Program Title – Name of the Program (Required)
- Funding Agency – Selected from a drop-down list (Required)
- Funding Sub-agency – Selected from a drop-down list
- CFDA – Numeric code or “State”
- CFDA Description – Free format description
- SubObj – State category code
- Active – Check box; click on the box for active, click again on the box for not active (box will be blank); default has box checked for Active Program.
- GOCCP Only – Check box, default is empty; click on the box if program is GOCCP only (in-house funds not visible externally)
- Funding Code – Either 1 – State; 3 – Special; 5 - Federal; or 9- Reimbursable
- App Code – Internally created Application Code
- Programmatic Reporting Frequency – Select either Monthly (default), Quarterly, Semi-Annually or Annually from the drop-down menu
- Financial Reporting Frequency – Select either Monthly (default), Quarterly, Semi-Annually or Annually from the drop-down menu
- Notes – Text box for data entry

3. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the Funding Program.



Press the X to cancel – you will lose any information you entered for the new program if you cancel.

**Note:** At a minimum, you must supply a Grant Code, Application Code, Program Title and Funding Agency in order to Save the new Funding Program.

4. Upon saving the new Funding Program, you are returned to the Funding Program screen.

Note: This completes the initial creation of the new Funding Program. In order to complete it and make it available to the GFD creation process, you must provide the following detailed program information:

- Contacts
- Special Conditions
- Performance Measures
- Progress Reports
- Federal Purpose
- Activity Log
- Documents

To begin, locate the new Funding Program record in the list and click the View icon associated with it. The Program Menu appears to the left of the screen, and the process area corresponding to the Contacts menu item appears in the right pane of the screen.

### 6.2.1.2 Add Contacts to a Funding Program (Based on assigned permissions)

1. Add Contacts to the new Funding Program Contacts link by clicking Contacts in the Program Menu. All of the appropriate Contact Titles that can be used for the Funding Program appear in the process area. Contact Titles appear for GOCCP representatives and Federal representatives.

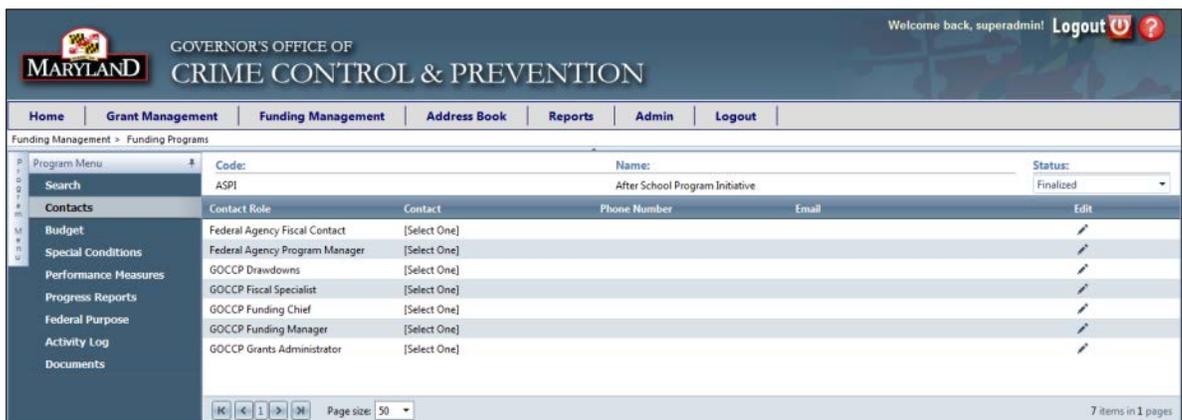


Figure 44 - Add Contacts to a Funding Program

2. Click on the pencil icon (Edit) to add the appropriate Contact by Title to the new Funding Program.



- Contacts for a given title are pre-designated in the system by roles and are provided in a drop-down menu.
- Only one Contact can be added for each title and not all titles need to have a Contact assigned.

3. Click the arrow on the drop-down list and click on a contact to select it. Then save the contact by clicking on the checkmark icon in the lower right hand corner of the Contact Title section.

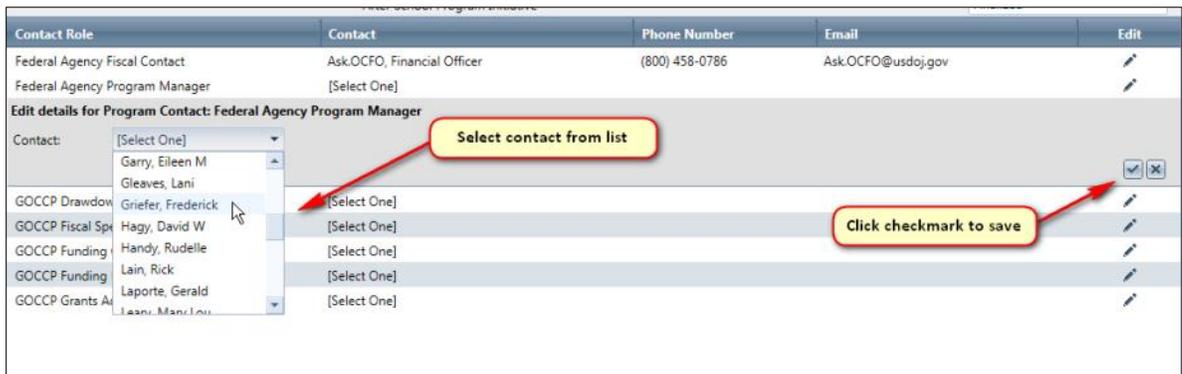


Figure 45 - Select a Contact to Assign to Funding Program

4. Repeat steps 1 through 3 for each required contact for the Funding Program.

### 6.2.1.3 Add Special Conditions to a Funding Program

The Special Conditions screen is used to define requirements set by the Funding Source in order to utilize the monies from the Funding Program.

1. Click Special Conditions in the Program Menu to the left of the screen.

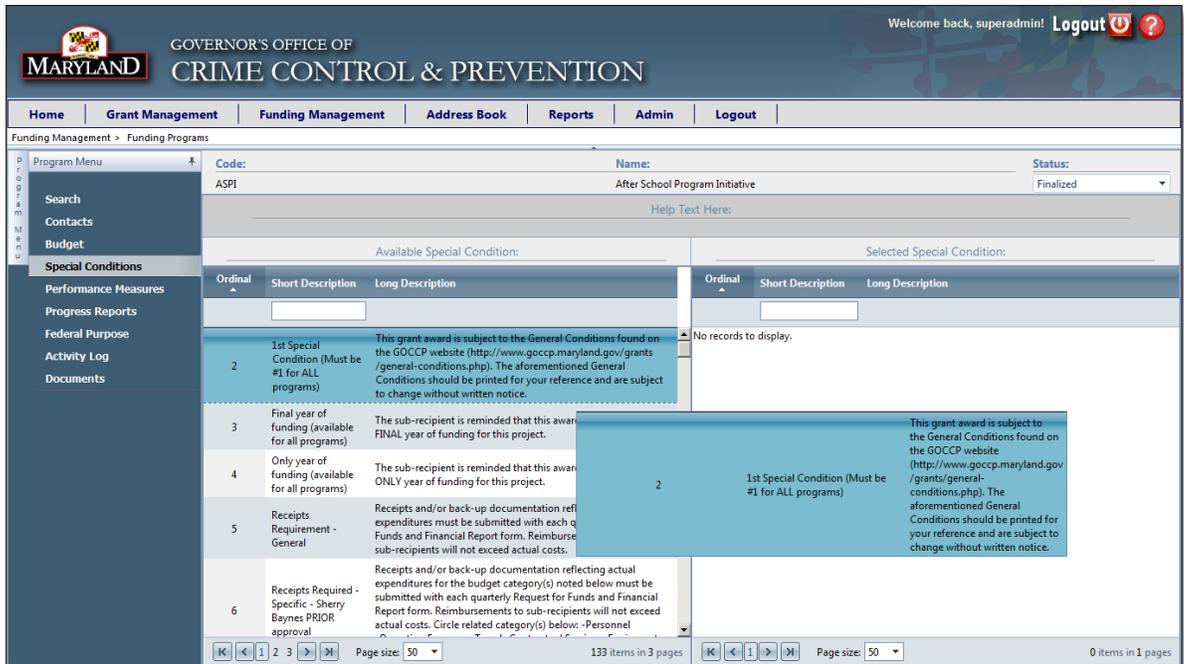


Figure 46 - Add Special Conditions to a Funding Program

- The **Available Special Conditions** pane provides a complete list of special conditions in the GMS database. Special Conditions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Special Conditions** pane is a list of special conditions that apply to this funding program.

To add a Special Condition to the Selected pane:

1. Locate the Special Condition you wish to select for this funding program. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
2. Left click on the Special Condition and hold the mouse button down.
3. Drag it over to the Selected Special Condition Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Special Condition you wish to select for this funding program.

#### 6.2.1.4 Add Performance Measures to a Funding Program

The Performance Measures screen is used to define questions the sub-recipient will answer while utilizing monies from the Funding Program.

1. Click Performance Measures in the Program Menu to the left of the screen.

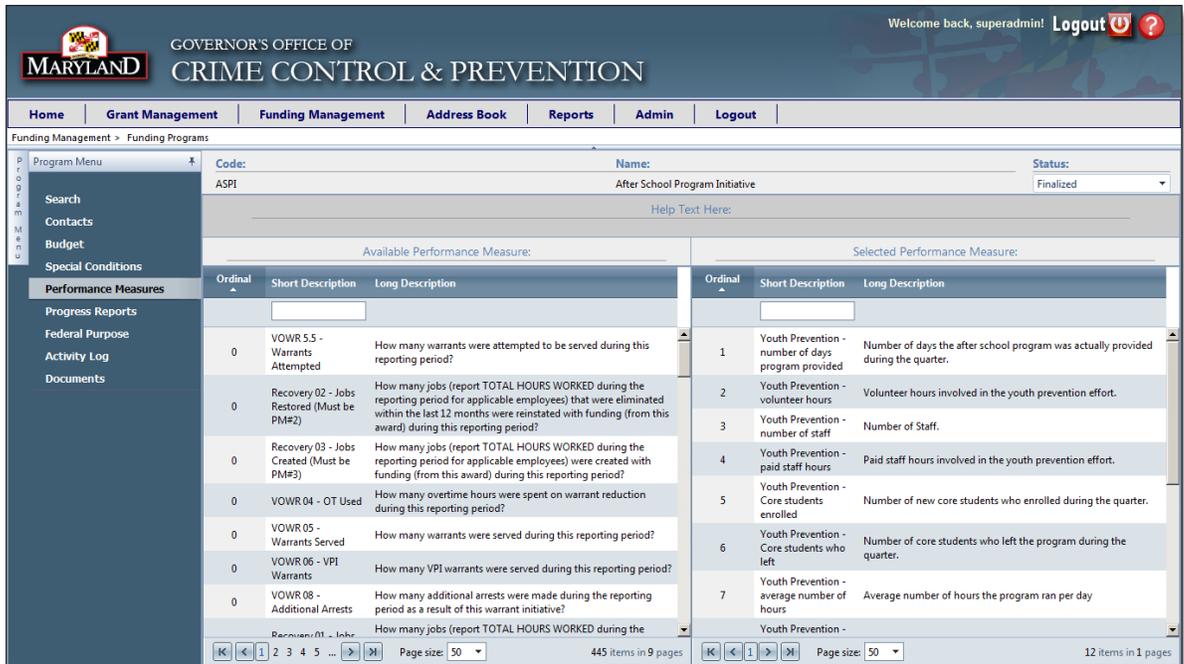


Figure 47 - Add Performance Measures to a Funding Program

- The **Available Performance Measures** pane provides a complete list of performance measures in the GMS database. Performance Measures not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Performance Measures** pane is a list of performance measures that apply to this funding program.

To add a Performance Measure to the Selected pane:

1. Locate the Performance Measure record you wish to select for this funding program. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
2. Left click on the record and hold the mouse button down.
3. Drag it over to the Selected Performance Measure Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Performance Measure you wish to select for this funding program.

### 6.2.1.5 Add Progress Report Questions to a Funding Program

Adding Progress Report Questions is similar to the processes of adding Performance Measures or Special Conditions to a Funding Program.

1. Click Progress Reports in the Program Menu to the left of the screen.

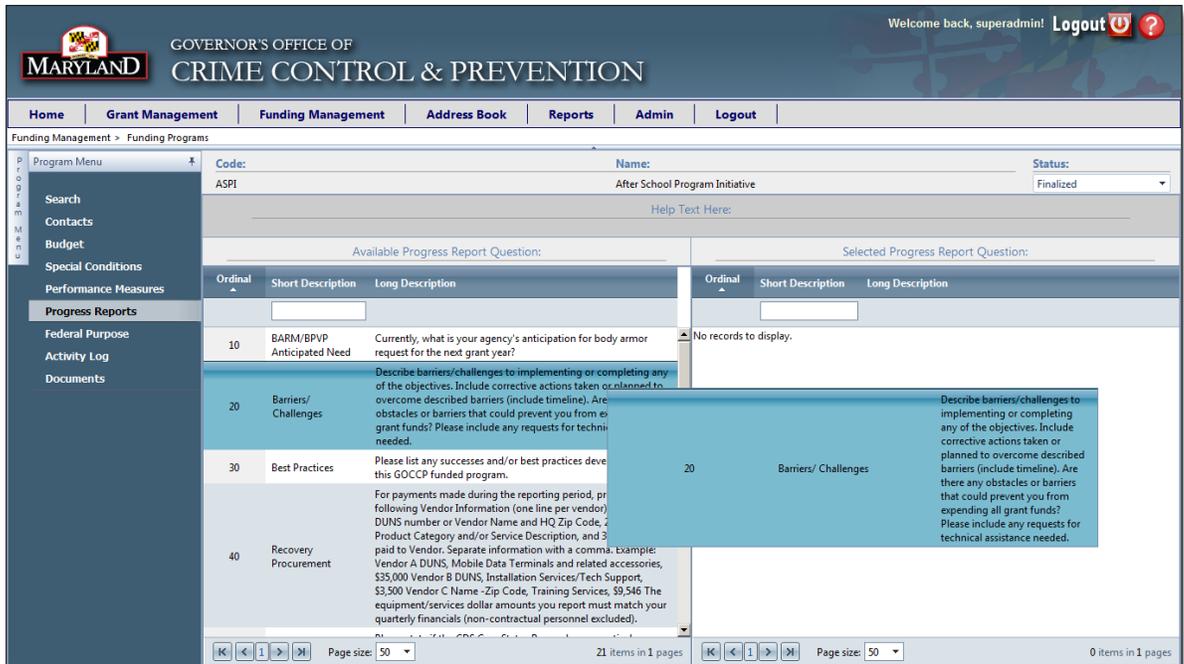


Figure 48 - Add Progress Report Questions to a Funding Program

- The **Available Progress Report Questions** pane provides a complete list of progress report questions measures in the GMS database. Progress report questions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Progress Report Questions** pane is a list of progress report questions that apply to this funding program.

To add a Progress Report Question to the Selected pane:

1. Locate the Progress Report Questions record you wish to select for this funding program. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
2. Left click on the record and hold the mouse button down.
3. Drag it over to the Selected Progress Report Questions Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Progress Report Question you wish to select for this funding program.

#### 6.2.1.6 Add Federal Purpose Area(s) to a Funding Program

Adding Federal Purpose Area(s) is similar to the processes of adding Performance Measures, Special Conditions or Progress Report Questions to a Funding Program.

1. Click Federal Purpose in the Program Menu to the left of the screen.

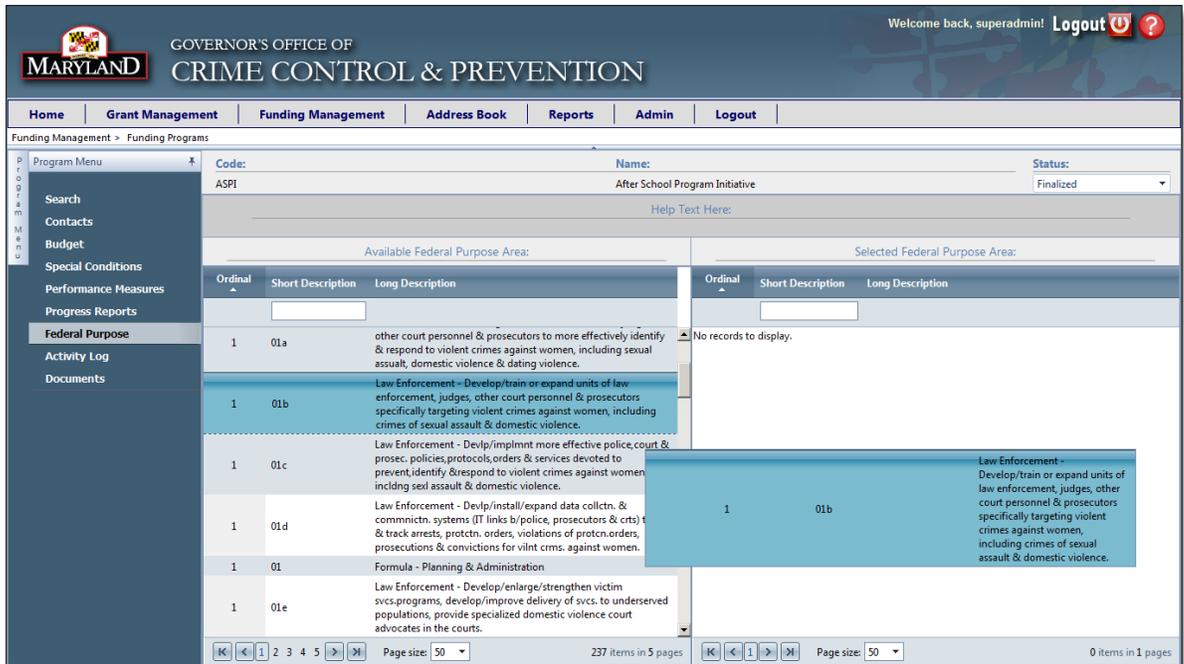


Figure 49 - Add Federal Purposes to a Funding Program

- The **Available Federal Purpose Areas** pane provides a complete list of federal purpose areas in the GMS database. Federal purpose areas not already in the database must be added to GMS using the Admin -> Reporting Requirements tool in order to appear here.
- The **Selected Federal Purpose Areas** pane is a list of federal purpose areas that apply to this funding program.

To add a Federal Purpose Area to the Selected pane:

1. Locate the Federal Purpose Area record you wish to select for this funding program. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
2. Left click on the record and hold the mouse button down.
3. Drag it over to the Selected Federal Purpose Areas Pane.
4. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
5. Repeat steps 1 through 4 for each Federal Purpose Area you wish to select for this funding program.

### 6.2.1.7 Add an Activity Log entry to a Funding Program

Activity Log entries can be added to a Funding Program to keep track of administrative actions that occur.

1. Click Activity Log in the Program Menu to the left of the screen.

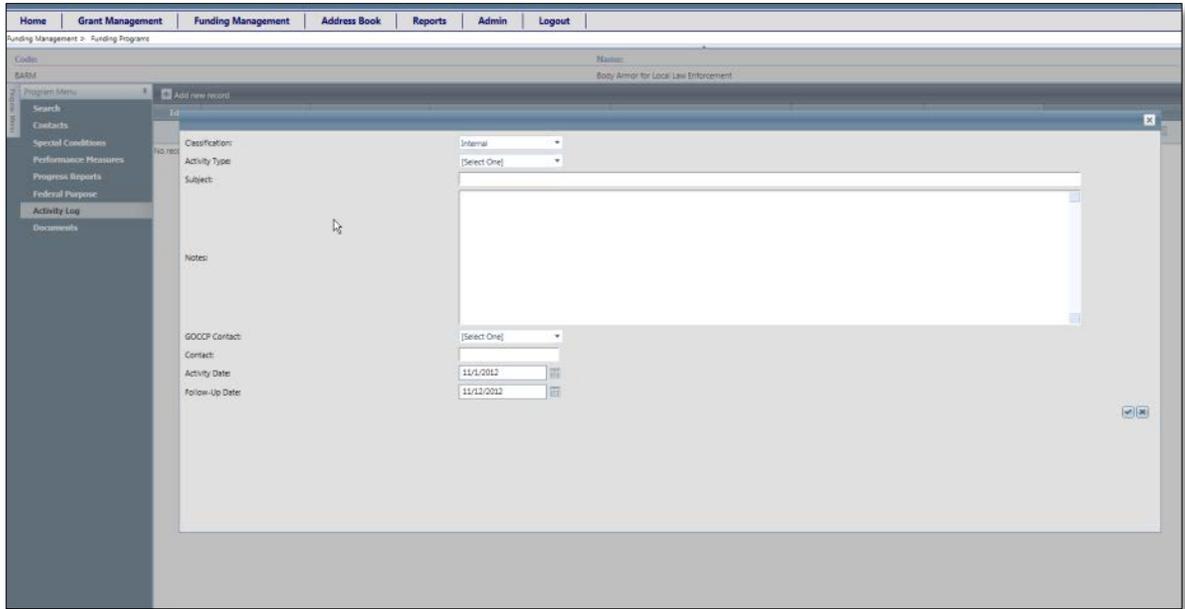


Figure 50 - Add Activity Log Entry to Funding Program

### 6.2.1.8 Add Documents to a Funding Program

Use this screen to attach supporting documents to a funding program.

1. Click Documents in the Program Menu to the left of the screen.

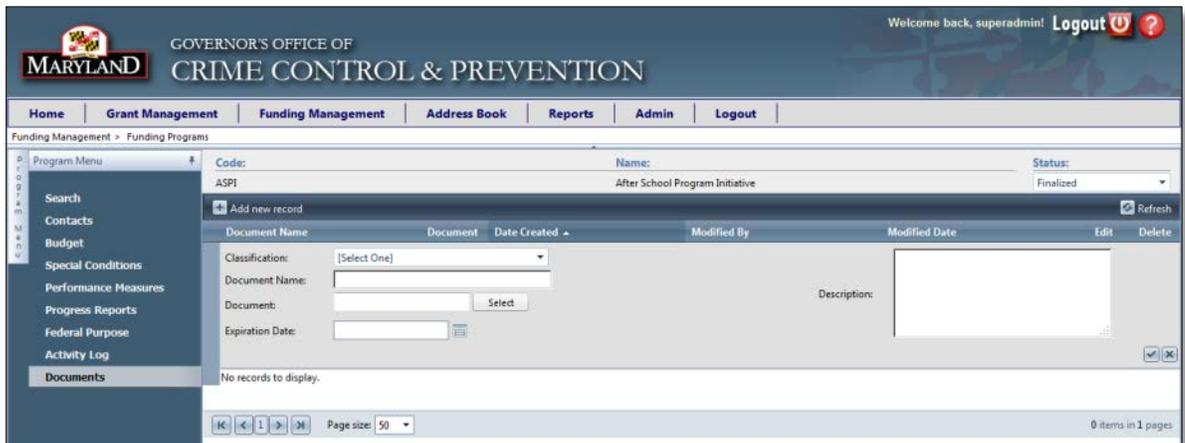


Figure 51 - Add Documents to Funding Program

2. Click the Add New Record icon to display the data entry screen.
3. Select a classification for the document from the Classification drop-down list.
4. Type a descriptive name for the document in the Document Name field.
5. Click the Select button beside the Document field. This brings up a standard dialog box that allows you to search for the document on your hard disk and select it.
6. If applicable, click the calendar icon next to the Expiration Date field and choose a date by clicking on it
7. Type a description into the Description field.

- Click the checkmark icon to the lower left of the screen to upload and save the document to the Funding Program. If you click on the cancel icon (X), the document will not be uploaded or saved and you'll be returned to the previous screen.

## 6.2.2 View Funding Programs

Place the cursor over the Funding Management menu item, then select Funding Programs from the drop-down list to Add, View, Edit, Delete and Search Funding Programs. The system displays the current list of all Funding Programs (by default initially displays only Active programs).



**Note:** You must have appropriate system permissions to Add, Edit or Delete Funding Programs.

All funding programs are displayed in the process area as shown below:

Edit	Grant Code	Program Title	Funding Agency	Funding Subagency	CFDA	Funding Code	Application Code	Active	View	Delete
			[All]	[All]		[All]		Active		
	ASPI	After School Program Initiative	Temp Value	Temp Value	State	01 - State	AS	<input checked="" type="checkbox"/>		
	BARM	Body Armor for Local Law Enforcement	Temp Value	Temp Value	State	01 - State	BA	<input checked="" type="checkbox"/>		
	BCCP	Baltimore City Community Policing	Temp Value	Temp Value	State	01 - State	BC	<input checked="" type="checkbox"/>		
	BCFI	Baltimore City Firearm Investigation Violence Prev.	Temp Value	Temp Value	State	09 - Reimbursable	BI	<input checked="" type="checkbox"/>		
	BCFP	Baltimore City Foot Patrol	Temp Value	Temp Value	State	01 - State	BF	<input checked="" type="checkbox"/>		
	BCVC	Baltimore City Violent Crime Control Grant	Temp Value	Temp Value	State	01 - State	BV	<input checked="" type="checkbox"/>		
	BIAG	Byrne - Justice Assistance Grant (JAG) Program	Office of Justice Programs (OJP)	Bureau of Justice Assistance (BJA)	16.738	05 - Federal	BJ	<input checked="" type="checkbox"/>		
	BIAS	Byrne - Justice Assistance Grant (JAG-SUPP)	Office of Justice Programs (OJP)	Bureau of Justice Assistance (BJA)	16.738	05 - Federal	BS	<input checked="" type="checkbox"/>		
	BJNT	BJNT - Interest for BJAG Sub-awards	Office of Justice Programs (OJP)	Bureau of Justice Assistance (BJA)	16.738	05 - Federal	BN	<input checked="" type="checkbox"/>		
	BJRA	Byrne Justice Recovery Act	Office of Justice Programs (OJP)	Bureau of Justice Assistance (BJA)	16.803	05 - Federal	BB	<input checked="" type="checkbox"/>		
	BPVP	Bullet Proof Vest Program	Office of Justice Programs (OJP)	Bureau of Justice Assistance (BJA)	16.607	05 - Federal	BP	<input checked="" type="checkbox"/>		
	BRIN	BRIN - Interest for BJRA Sub-awards	Temp Value	Temp Value	16.803	05 - Federal	BT	<input checked="" type="checkbox"/>		
	BYRN	Byrne Memorial Formula Grant Program	Office of Justice Programs (OJP)	Bureau of Justice Assistance (BJA)	16.579	05 - Federal	BR	<input checked="" type="checkbox"/>		
	CACS	Child Advocacy Centers	Temp Value	Temp Value	State	01 - State	CH	<input checked="" type="checkbox"/>		

Figure 52 - Funding Management -> View Funding Program List

Each Funding Program is displayed on a separate row, and is uniquely identified by a Grant Code. Information about each program is displayed in the following columns:

- Grant Code – GOCCP assigned Code
- Program Title – User created Program Title
- Funding Agency – Valid list of Funding Agencies
- Funding Sub-agency - Federal Bureau or Agency charged with the direct oversight of specific funding source(s)

- CFDA - Catalog of Federal Domestic Assistance is a numeric code identifying Federal funds (required for audits), if not numeric it will have "State," which identifies the funding as State not Federal
- Funding Code – Identifies the source of the appropriation
- Application Code – Two letter code that specifically identifies what program the applicant is applying for
- Active/Inactive Box

Each program has three icons associated with it, shown in the following columns:

- Edit (Pencil) - Click to edit the high-level details of the Funding Program
- View (Magnifying Glass) – Click to open the Program menu; from here you can edit individual items for a Funding Program (modify Budget items, assign Special Conditions, etc.)
- Delete (X icon) - Click to delete the Funding Program record

### 6.2.3 Edit a Funding Program

Click on the Edit icon for a Funding Program to edit the high-level details for the program. Make any required edits, and then click on the checkmark icon to save the edits, or the X icon to cancel the editing process.

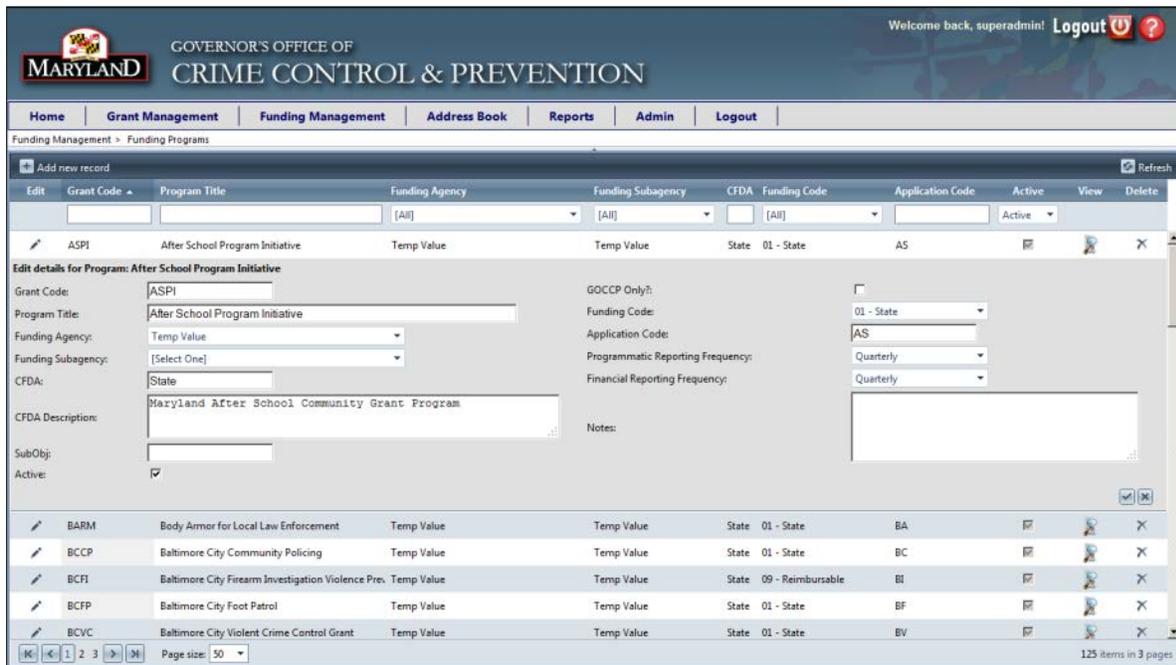


Figure 53 - Edit Funding Program

### 6.2.4 Delete a Funding Program

With proper system permission, you can delete a Funding Program by clicking on the X icon in the Funding Program row.



Figure 54 - Delete Funding Program

After clicking the X, a “Delete this Project?” confirmation message is displayed.

- Click the OK button to delete the Funding Program.
- If you click the Cancel button, the program is not deleted and you are returned to the Funding Program list.

## 6.3 Funding Years

The life of any Funding Program may span several years, with GOCCP receiving an annual amount of money to make available to sub-recipients applying for a grant based on that funding program.

- Once a Funding Program is established in the GMS, those annual dollars (or a portion of them) received by GOCCP for that program must be assigned to that program in the GMS in order to prepare a Grant Funding Distribution (GFD) that sub-recipients can apply to.
- This is accomplished by creating a Funding Year record.

Note: You must have appropriate system permissions to Add, Edit, or Delete Funding Years.

### 6.3.1 Create a Funding Year

A Funding Year is applied to a specific Funding Program. If you are creating a Funding Year for a *new* funding program, be sure that the new Funding Program has already been created and finalized.

#### 6.3.1.1 Add a New Funding Year Record

1. From the Funding Year list, click on the *Add new record* link in the upper left hand corner of the Funding Year process area, above the column headers.



Upon clicking *Add new record*, the data entry screen appears:

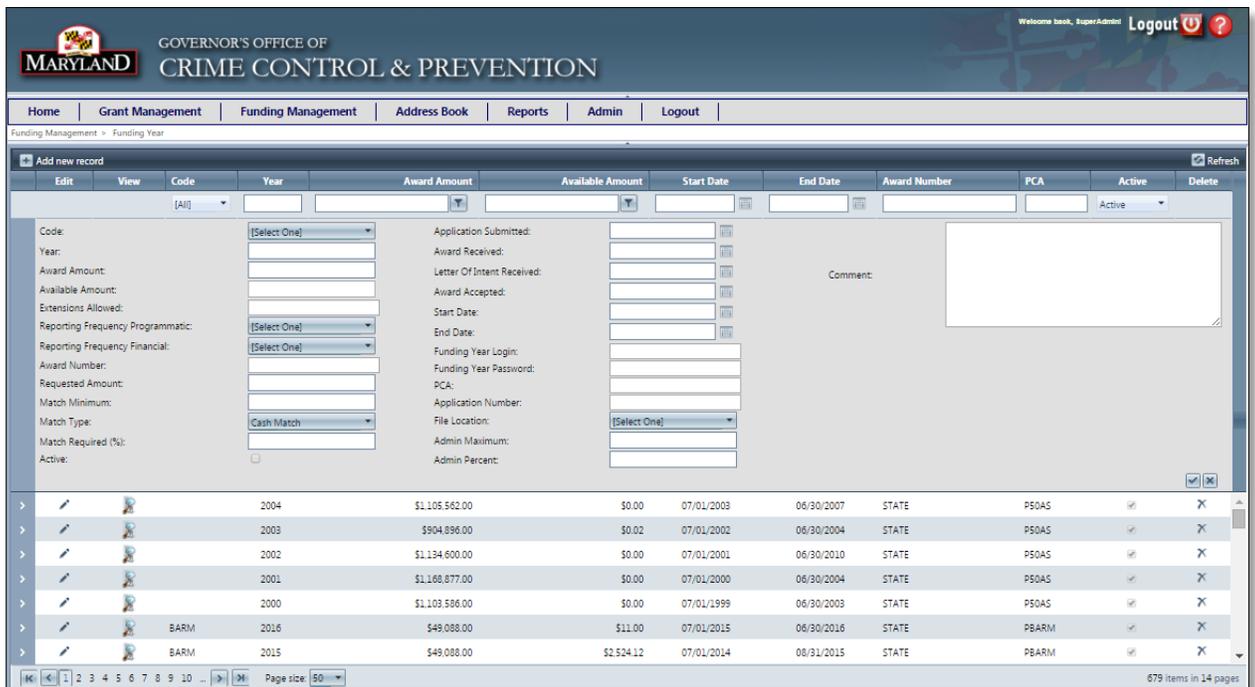


Figure 55 - Create New Funding Year – Initial Data Entry Screen

- Complete each field in the initial data entry screen for the new Funding Year as follows:

FUNDING YEAR – “ADD NEW RECORD” FIELDS	
Code	Dropdown List: Select the code for the <b>Funding Program</b> that this Funding Year will be based upon.
Year	Type in the four-digit year that applies to this Funding Year record.
Award Amount	Type in the total amount that GOCCP has received for the funding program selected for this Funding Year record.
Available Amount	Display Only: This field displays the <b>Award Amount</b> of this Funding Year record minus: 1) The amount already awarded to sub-recipients of the GFD based on this funding year and 2) The amount reserved for administration by GOCCP.
Extensions Allowed	This is a free-form text field. Enter YES, NO, or a comment if required for this record.

Reporting Frequency Programmatic	Select the frequency with which sub-recipients will be required to perform <b>Programmatic</b> Reporting for awarded grants based on this Funding Year. The choices are <b>Monthly, Quarterly, Semi-Annually, and Annually</b> .
Reporting Frequency Financial	Select the frequency with which sub-recipients will be required to perform <b>Financial</b> Reporting for awarded grants based on this Funding Year. As with programmatic reporting, the choices are <b>Monthly, Quarterly, Semi-Annually, and Annually</b> .
Award Number	This is a free-form text field. Enter the Federal assigned Award Number which is tied to the Funding Program for this Funding Year record.
Requested Amount (initial app)	Enter the amount that GOCCP originally requested for this Funding Year record. This may or may not equal the <b>Award Amount</b> for this record.
Match Type	A sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food). Select the match type from the drop-down list: Select either <b>Cash Match, In-Kind Match, or Both</b> .
Match Minimum	Enter the dollar amount a sub-recipient must provide in matching funds for a grant based on this funding year. If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in the <b>Match Required (%)</b> field and the dollar amount will automatically be added in this field.
Match Required (%)	If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the <b>Match Minimum</b> field.
Active	Click the checkbox to make this Funding Year record <b>Active</b> .
Application Submitted	Enter the date the application for this Funding Year was submitted.
Award Received	Enter the date this Funding Year award was received.
Letter of Intent Received	Enter the date that the Letter of Intent for this Funding Year was received.
Award Accepted	Enter the date this Funding Year award was accepted.
Start Date	Enter the date of the first day that funding will be available for this Funding Year and associated GFD.
End Date	Enter the date of the last day that funding will be available for this Funding Year and associated GFD.
Funding Year Login	Enter the Login that GOCCP uses to access the system responsible for awarding funds for the Funding Program used in this Funding Year record.
Funding Year Password	Enter the Password associated with the <b>Funding Year Login</b> in this record.
PCA	Enter the Program Cost Account (PCA) associated with this Funding Year record. This is generally the four-digit Funding Program code associated with this Funding Year record preceded by a "P", for example <b>PATFP</b> .
Application Number	Enter the application number that the funding agency assigned to your application for funding year dollars for the Funding Program in this record.
File Location	Choose either " <b>Grant Manager's Room</b> ", " <b>Archives A8</b> ", " <b>File Room 1</b> " or " <b>File Room 2</b> " from the drop-down list to select the physical location of the file for this Funding Year record.
Admin Maximum	Enter the maximum portion (in dollars) of the <b>Award Amount</b> for this Funding Year that can be allocated to GOCCP for administrative purposes. If you do not have a dollar amount but rather a percentage, enter the percentage in the <b>Admin Percent</b> field in this record; doing so will automatically populate this field with the correct dollar amount.
Admin Percent	If the Admin Maximum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the <b>Admin Maximum</b> field.
Comment	This is a free-form text field. Enter any notes or comments regarding this funding year that you would want other users to see when they view or edit

this Funding Year record.

- Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the Funding Year.

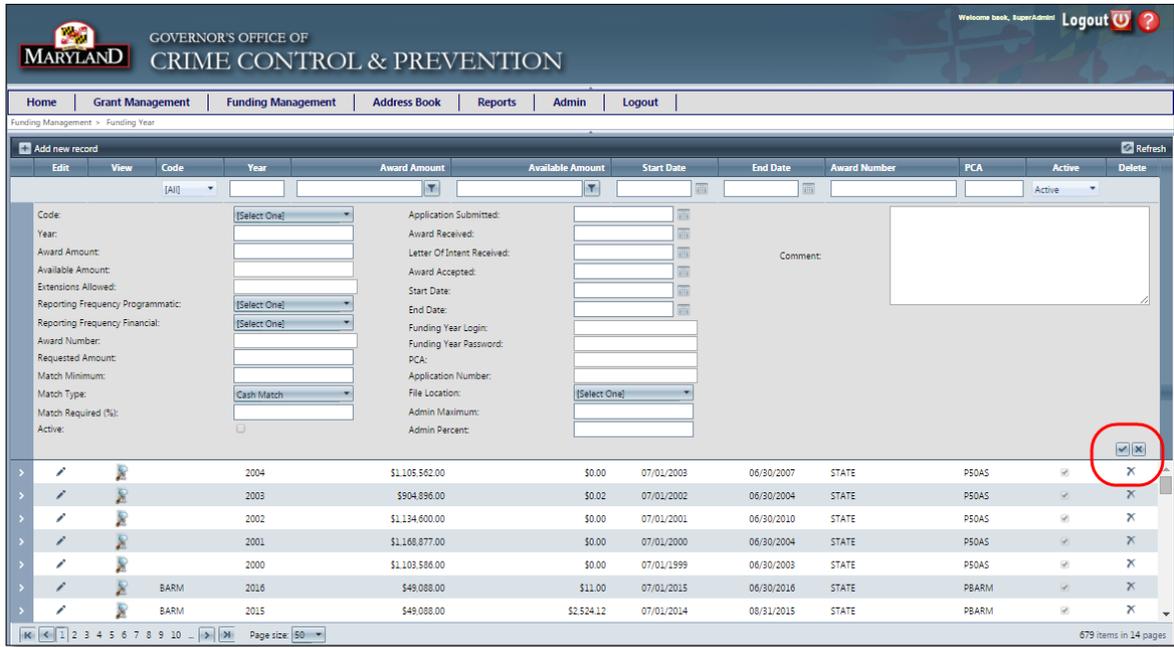


Figure 56 - Save new Funding Year record

Press the X to cancel – you will lose any information you entered for the new funding year if you cancel.

- Upon saving the new Funding Year, you are returned to the Funding Year screen. To find your new record easily, filter the list by selecting the Funding Program code for the Funding Year record you just added from the Code drop-down list.

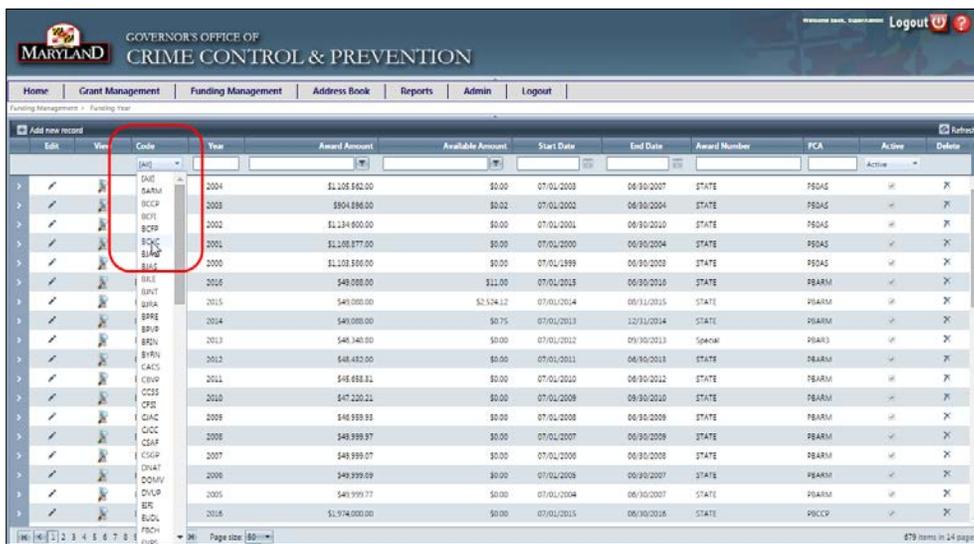


Figure 57 - Filter the Funding Year by Selecting a Funding Program Code

5. After creating the new Funding Year record, you can further define the Funding Year by adding the following types of information to it:

- Funding Source Breakdown
- Documents
- GAN
- Activity Log
- Admin Allowance (Admin Allowance is it's own process – please refer to section 6.3.2 for detailed instructions on using Admin Allowances.)

To further define the Funding Year, click on the magnifying glass icon in the View column of the Funding Year record you wish to add information to:



Figure 58 - Add Detail to Funding Year

6. The Funding Year Menu and Data Entry screen is displayed. Refer to the sections immediately following this one for instructions on adding new detailed information to a Funding Year.

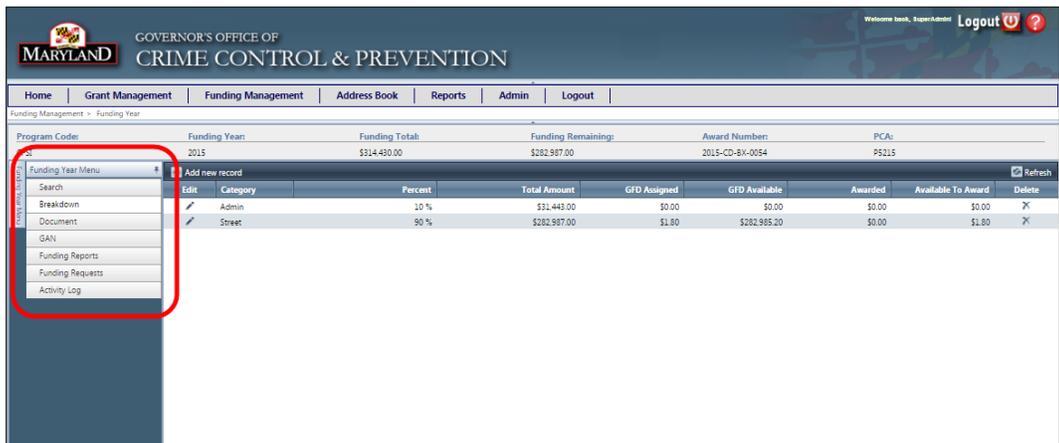


Figure 59 - Access the Funding Year Menu and Data Entry Screen

### 6.3.1.2 Add a Breakdown Record to a Funding Year

Funding years are further identified by various categories. Funding Source Breakdowns allows funds to be designated into Street, Admin, Passthrough, or Mandated groups.

1. Click on Breakdown in the Funding Year Menu.



Figure 60 – Access Breakdown from Funding Year Menu

Any existing Breakdown records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

BREAKDOWN RECORD DISPLAY FIELDS	
Edit	Click the pencil icon in this column to edit an existing Breakdown record.
Category	This field displays the category for an existing Breakdown record: <b>Street, Admin, Pass-through, or Mandate.</b>
Percent	This field displays the percentage of the Award Amount for the Funding Year record you are currently viewing that has been allocated to this breakdown record.
Total Amount	This field displays the total dollar amount allocated to this breakdown record of the Award Amount for the Funding Year record you are currently viewing.
GFD Assigned	This field displays the dollar amount <b>for this breakdown</b> record that has been allocated to a GFD.
GFD Available	This field displays the dollar amount <b>for this breakdown</b> record that is available to be allocated to a GFD.
Awarded	This field displays the total dollar amount for the <b>Funding Year</b> you are viewing that has been awarded to sub-recipient grants.
Available to Award	This field displays the total dollar amount for the <b>Funding Year</b> you are viewing that is available to be awarded for grants to sub-recipient.
Delete	Click the X icon in this column to delete an existing Breakdown record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

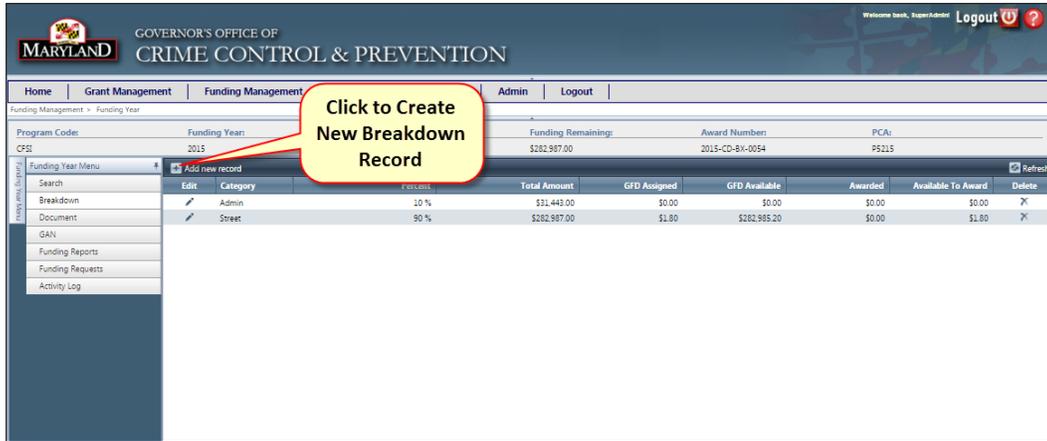


Figure 61 - Add New Breakdown Record

Upon clicking *Add new record*, the data entry screen appears:

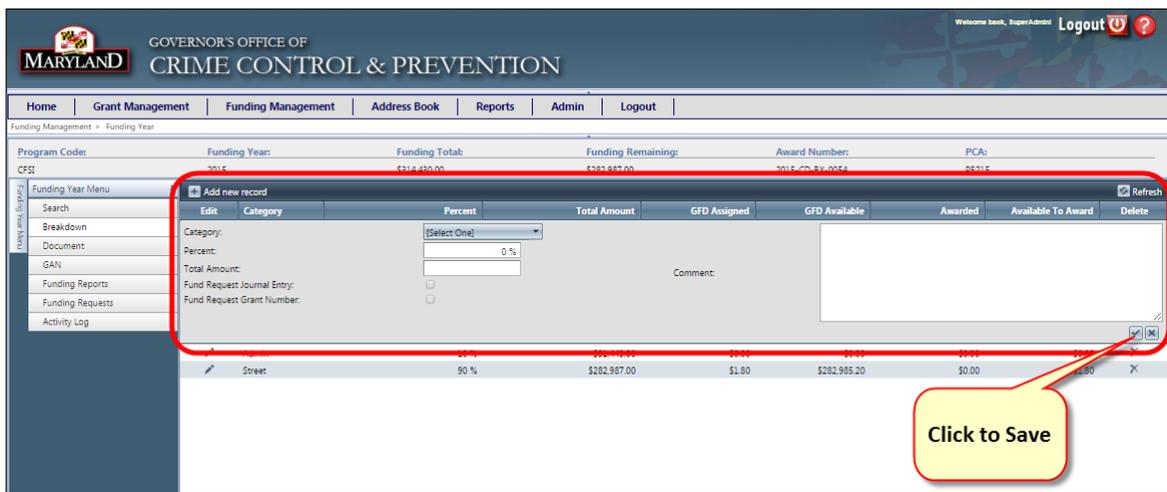


Figure 62 - Add New Breakdown Record - Data Entry Screen

3. Complete each field in the data entry screen for the new Breakdown record as follows:

BREAKDOWN – “ADD NEW RECORD” FIELDS	
Category	Select the category for this existing Breakdown record from the drop-down menu: <b>Street, Admin, Pass-through, or Mandate.</b>
Total Amount	Enter the amount in dollars of the <b>Award Amount</b> for this Funding Year that is to be allocated to this Breakdown record. If you do not have a dollar amount but rather a percentage, enter the percentage in the <b>Percent</b> field in this record; doing so will automatically populate this field with the correct dollar amount.
Percent	If the <b>Total Amount</b> is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be displayed in the <b>Total Amount</b> field.
Fund Request Journal Entry	<b>TBD</b>
Fund Request Grant Number	Click in the checkbox in this column to indicate that the breakdown is GFD eligible.
Comment	This is a free-form text field. Enter any notes or comments regarding this funds breakdown that you would want other users to see when they view or edit this Breakdown record.

- Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Funding Year Breakdown record.

### 6.3.1.3 Attach a Document to a Funding Year

You can attach relevant documentation in various forms (word processing document, spreadsheet, email message, etc) to a Funding Year record.

- Click on Document in the Funding Year Menu.

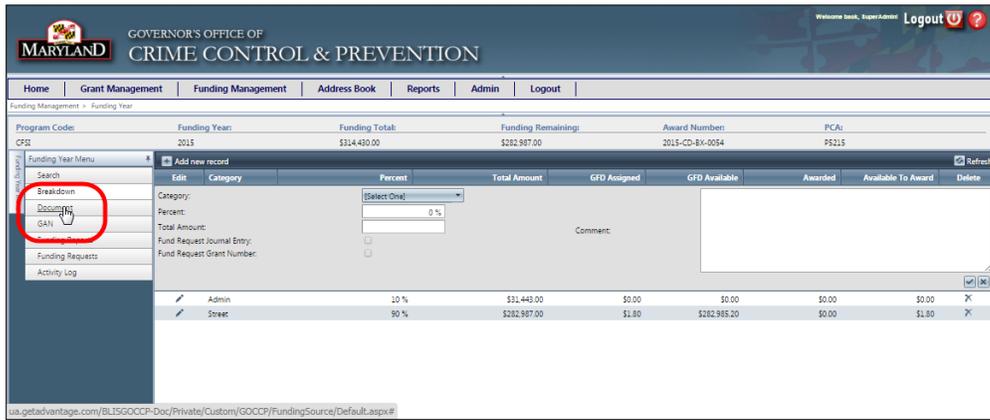


Figure 63 - Access Documents from Funding Year Menu

Any existing Document records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

DOCUMENT RECORD DISPLAY FIELDS	
NOTE: Documents are classified into various groups (you classify a document when you attach it to a Funding Year). All documents in a group are displayed below a blue-shaded header row that identifies the classification.	
Edit	Click the pencil icon in this field to edit the information associated with an existing document attached to this Funding Year.
Document	When viewing Document records, this field contains a <b>Download</b> link, which you can click on to download that document.
Document Name	The name assigned to the document when it was attached (not a file name).
Created	This field displays the date the document was attached.
Modified	This field displays the date the document record was last edited.
Modified By	This field displays the user name of the person who last edited the document record.
Delete	Click on the pencil in this column to delete this Document record, which will un-attach the attached document.

- Click the Add new record icon in the top left corner of the Data Entry screen.

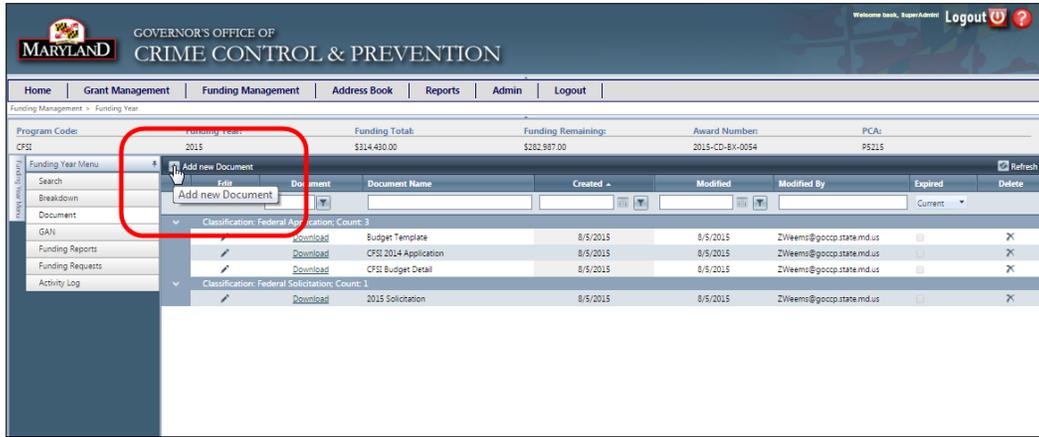


Figure 64 - Add New Document Record

Upon clicking *Add new record*, the data entry screen appears:

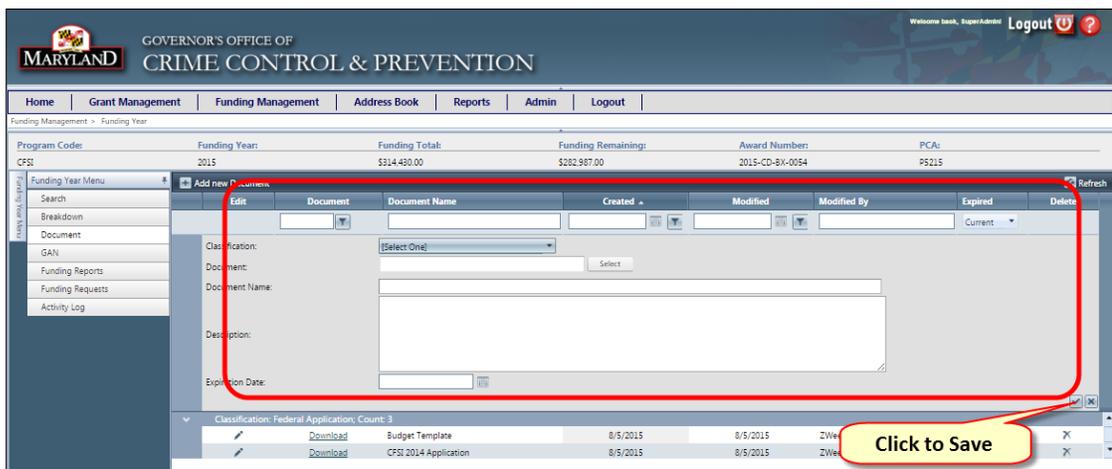


Figure 65 - Add New Document Record - Data Entry Screen

3. Complete each field in the data entry screen for the new Document record as follows:

DOCUMENT – “ADD NEW RECORD” FIELDS	
Classification	Click the <b>dropdown list</b> and select a classification for this document (General Document, etc.).
Document	Click on the <b>Select</b> button beside this field to bring up a standard dialog box which allows you to choose a document from your hard drive to attach to this Funding Year.
Document Name	After selecting the file to upload, type in a descriptive name for this document in this field. The Document Name you choose does not have to be the same name as the file you uploaded.
Description	Enter a detailed description of the document in this field. It is a free-form text field so you can make the description as detailed as you'd like.
Expiration Date	Click on the calendar icon beside this field to choose the date this document will no longer be available for viewing in this Funding Year record. Alternatively you can type the date directly into the field.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to attach the new document to this Funding Year and save the new Document record.

### 6.3.1.4 Add a Grant Adjustment Notice (GAN) to a Funding Year

1. Click on GAN in the Funding Year Menu.

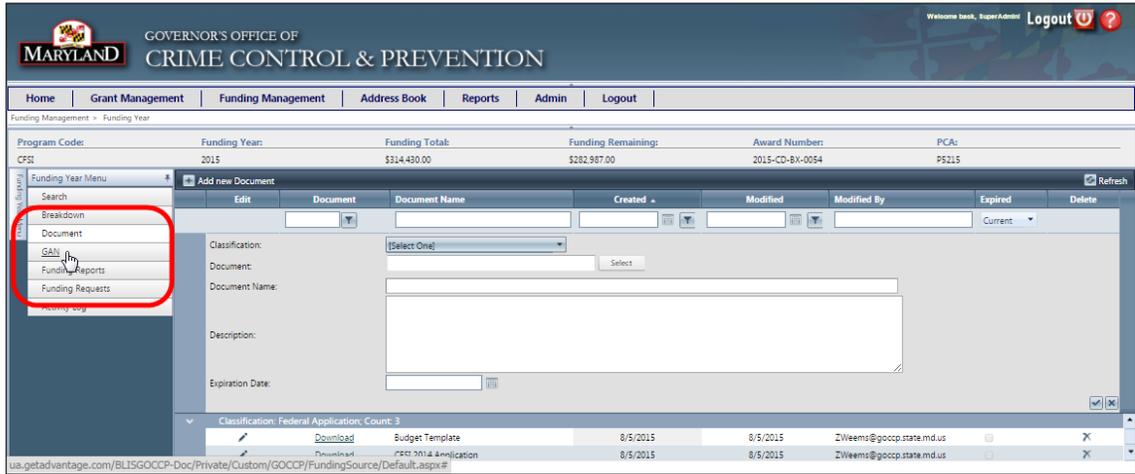


Figure 66 – Access GAN from Funding Year Menu

Any existing GAN records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

GAN RECORD DISPLAY FIELDS	
GAN Number	This field displays the unique GAN number that was assigned to this record when it was added (set automatically).
Federal GAN Number	This field displays the federal-assigned GAN number.
Approved Date	This field displays the date this GAN record was approved.
REOB/DEOB Amount	This field displays the dollar amount of the funding amendment de-obligation / re-obligation defined in this GAN record.
Start Date	This field displays the new start date (if applicable).
End Date	This field displays the new end date (if applicable).
Status	This field displays the status of this GAN record – <b>New</b> or <b>Approved</b> .
Last Update	This field displays the date that this GAN record was <b>last</b> updated – dates of prior revisions are not displayed.
Active	This field displays whether this GAN is <b>Active</b> or <b>Inactive</b> .
View	Click the magnifying glass icon in this field to edit detailed information for this GAN.
Edit	Click the pencil icon in this field to edit high-level information associated with this GAN.
Delete	Click the X icon in this field to delete this GAN record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

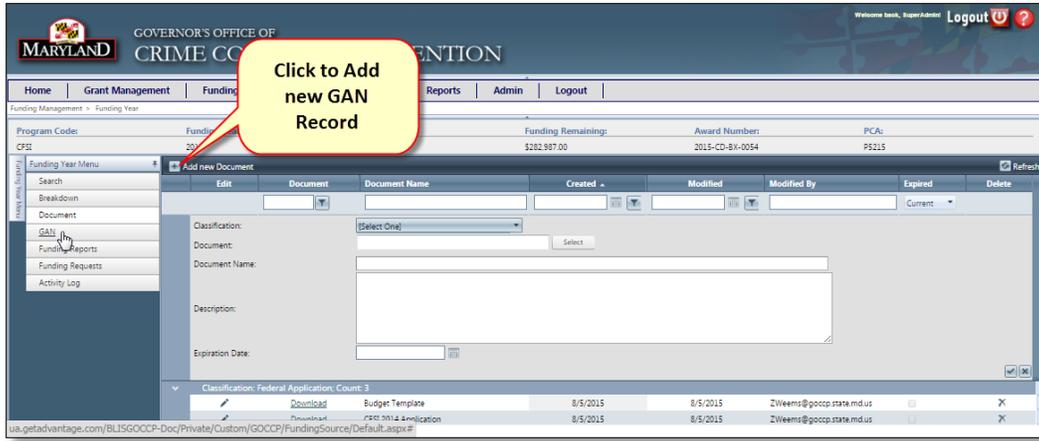


Figure 67 - Add New GAN Record

Upon clicking *Add new record*, the data entry screen appears:

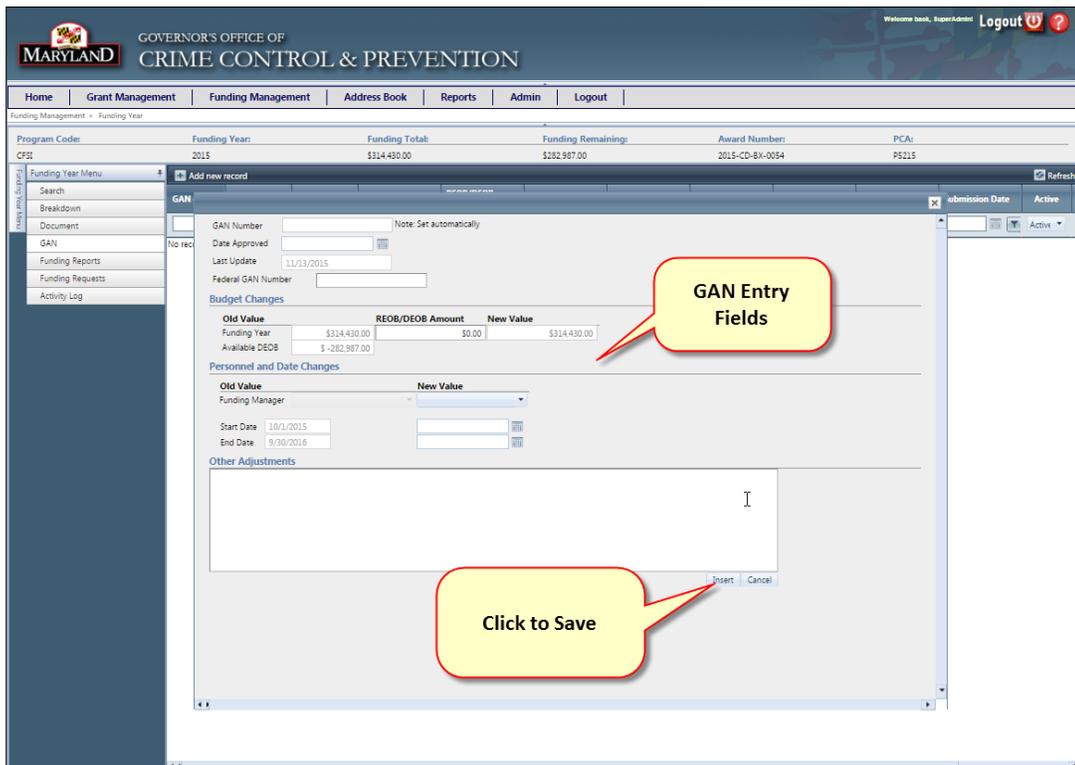


Figure 68 - Add New GAN Record - Data Entry Screen

- Complete each field in the data entry screen for the new GAN record as follows:

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	Enter the date this GAN was approved.
Federal GAN Number	Enter the federal-assigned GAN number.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this

	field.
<b>Budget Changes</b>	
<b>Funding Year</b>	
REOB/DEOB Amount	Enter the dollar amount of the REOB/DEOB funding for this GAN.
Old Value	Display only: Displays the original total dollar amount allocated to this Funding Year.
New Value	Display only: Displays the new total dollar amount allocated to this Funding Year after the REOB/DEOB amount is entered.
Available DEOB	Display only: Displays the available DEOB dollar amount.
Available REOB	Display only: Displays the available REOB dollar amount.
<b>Personnel and Date Changes</b>	
<b>Start Date</b>	
Old Value	Display only: Displays the original Start Date of the Funding Year.
New Value	Enter the new Start Date for this Funding Year record.
<b>End Date</b>	
Old Value	Display only: Displays the original End Date of the Funding Year.
New Value	Enter the new End Date for this Funding Year record.
Other Adjustments	This is a free-form text field. Enter any other miscellaneous adjustments or amendments to the Funding Year based on this GAN.
Insert/Cancel	After entering the required information for this GAN, click on the <b>Insert</b> button to save the record or click the <b>Cancel</b> button to cancel adding this GAN. If you hit the Cancel button, your changes will be lost.

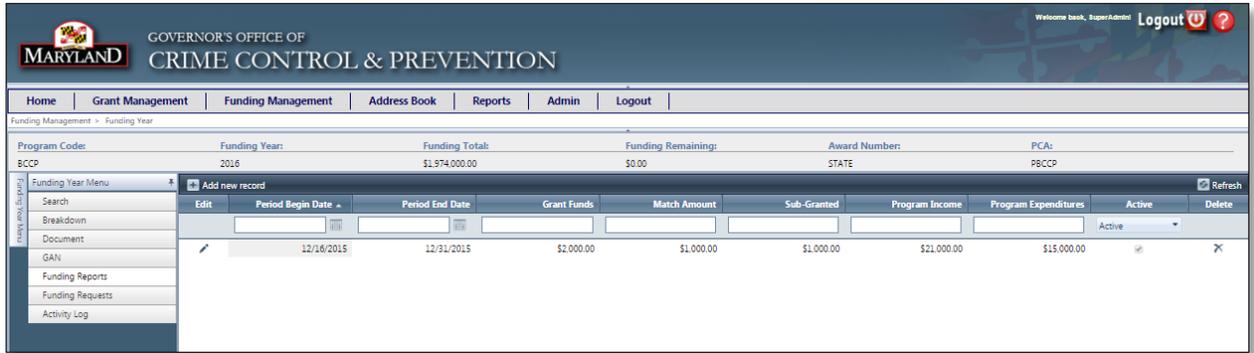
4. Click the Insert button located in the lower right hand corner of the Data Entry screen to save the new GAN record.
5. A GAN can also be added to an individual award, please see Section 7.8.8 of this document.

### 6.3.1.5 Add a Funding Report to a Funding Year

1. Click on Funding Reports in the Funding Year Menu.



Figure 69 – Access Funding Reports from Funding Year Menu



Any existing Funding Report records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

FUNDING REPORT RECORD DISPLAY FIELDS	
Period Begin Date	Begin date of financial reporting period.
Period End Date	End date of financial reporting period.
Grant Funds	Amount of grant funds expended this period.
Match Amount	Amount of match funds reported this period.
Program Income	Amount of program income earned during this period.
Program Expenditures	Amount of program income expended during this period.
Active	This field displays whether this Report is <b>Active</b> or <b>Inactive</b> .
Edit	Click the pencil icon in this field to edit high-level information associated with this Report.
Delete	Click the X icon in this field to delete this Report record.

2. Click the Add new record icon in the top left corner of the Data Entry screen.

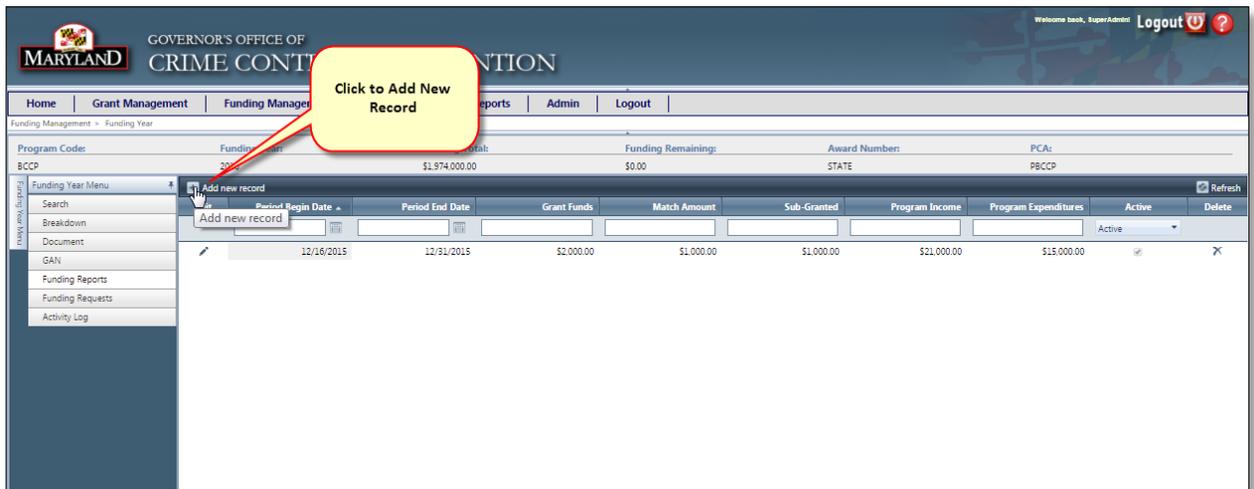


Figure 70 - Add New Funding Report Record

Upon clicking *Add new record*, the data entry screen appears:

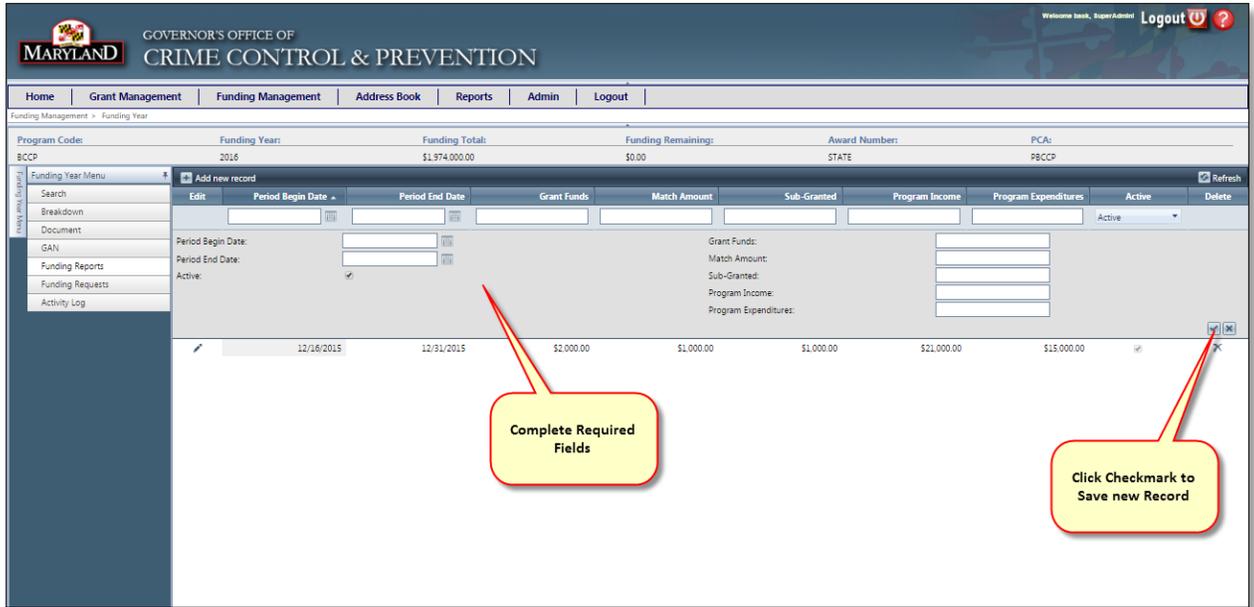


Figure 71 - Add New Funding Report Record - Data Entry Screen

- Complete each field in the data entry screen for the new FUNDING REPORT record as follows:

FUNDING REPORT "ADD NEW RECORD" FIELDS	
Period Begin Date	Begin date of financial reporting period.
Period End Date	End date of financial reporting period.
Active	This field displays whether this Report is <b>Active</b> or <b>Inactive</b> .
Grant Funds	Amount of grant funds expended this period.
Match Amount	Amount of match funds reported this period.
Program Income	Amount of program income earned during this period.
Program Expenditures	Amount of program income expended during this period.
Checkmark Button	Click to save new funding report record.
x Button	Click the X icon in this field to cancel adding new funding report record.

- Click the Checkmark button located in the lower right hand corner of the Data Entry screen to save the new Funding Report record.

### 6.3.1.5.1 Editing or Deleting a Funding Report Record

- To delete a Funding Report record, click the X icon in the Delete column of the record you wish to delete.
- To edit a Funding Report record, click the Pencil icon in the Edit column of the record you wish to edit.



### 6.3.1.6 Add a Funding Request to a Funding Year

1. Click on **Funding Request** in the Funding Year Menu.

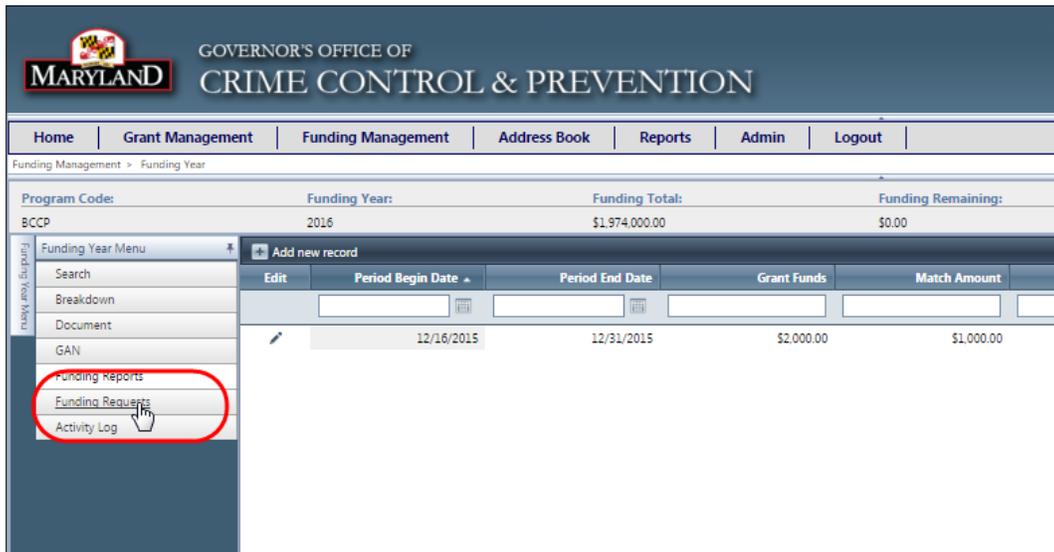
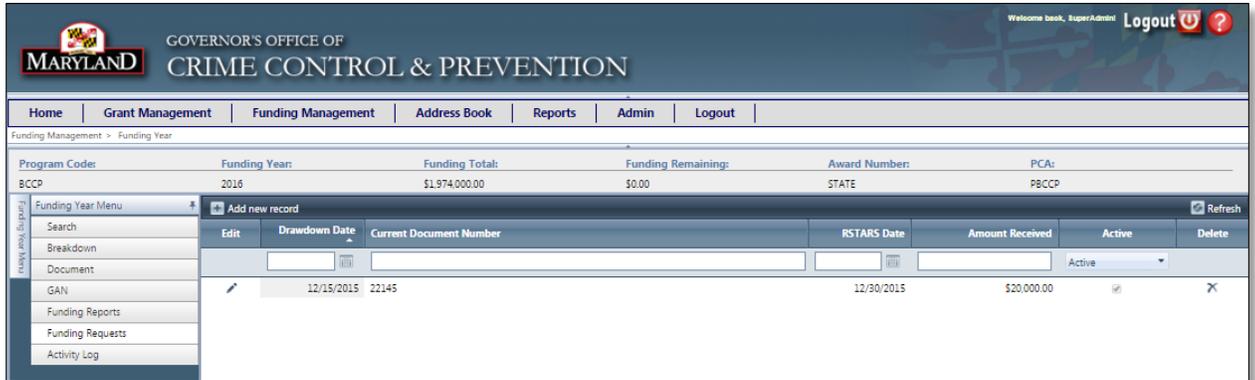


Figure 72 – Access Funding Request from Funding Year Menu



Any existing Funding Request records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

FUNDING REQUEST RECORD DISPLAY FIELDS	
Drawdown Date	Date funds were drawn down from Federal Government.
Current Document Number	FMIS Identification Number.
RSTARS Date	Date funds were processed in FMIS.
Amount Received	Amount received by the Comptroller in relation to this drawdown.
Active	This field displays whether this Request is <b>Active</b> or <b>Inactive</b> .
Edit	Click the pencil icon in this field to edit high-level information associated with this Request.
Delete	Click the X icon in this field to delete this Request record.

- Click the Add new record icon in the top left corner of the Data Entry screen.



Figure 73 - Add New Funding Report Record

Upon clicking *Add new record*, the data entry screen appears:

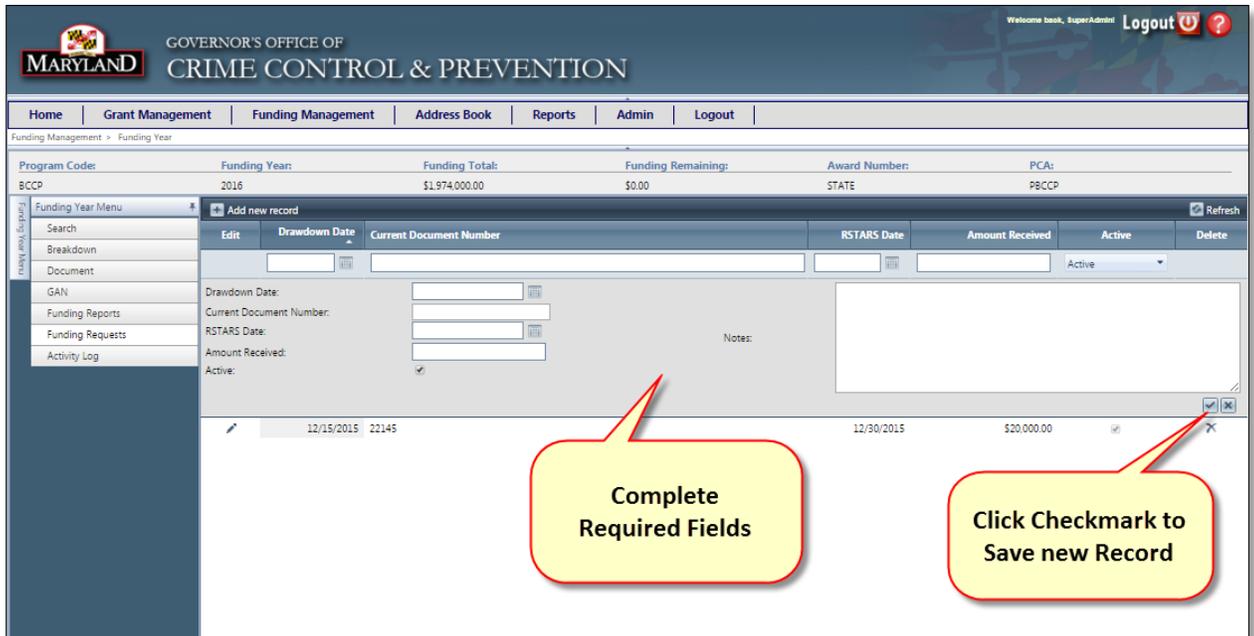


Figure 74 - Add New Funding Request Record - Data Entry Screen

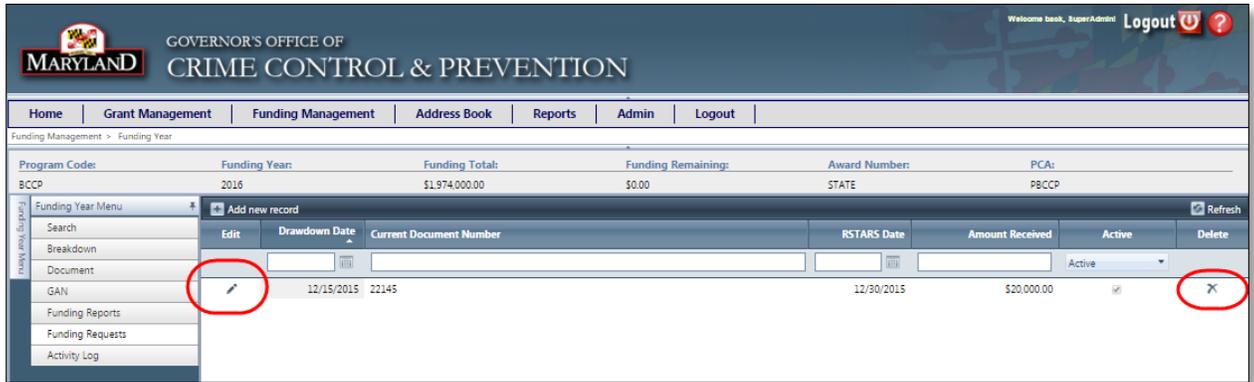
- Complete each field in the data entry screen for the new FUNDING REQUEST record as follows:

FUNDING REQUEST "ADD NEW RECORD" FIELDS	
Drawdown Date	Date funds were drawn down from Federal Government.
Current Document Number	FMIS Identification Number.
RSTARS Date	Date funds were processed in FMIS.
Amount Received	Amount received by the Comptroller in relation to this drawdown.
Notes	Add any additional information related to the drawdown record.
Active	This field displays whether this Request is <b>Active</b> or <b>Inactive</b> .
Edit	Click the pencil icon in this field to edit high-level information associated with this Request.
Delete	Click the X icon in this field to cancel adding this Request record.

- Click the Checkmark button located in the lower right hand corner of the Data Entry screen to save the new Funding Request record.

### 6.3.1.6.1 Editing or Deleting a Funding Request Record

- To delete a Funding Request record, click the X icon in the Delete column of the record you wish to delete.
- To edit a Funding Request record, click the Pencil icon in the Edit column of the record you wish to edit.



### 6.3.1.7 Add an Activity Log entry to a Funding Year

1. Click the Activity Log tab to highlight it.

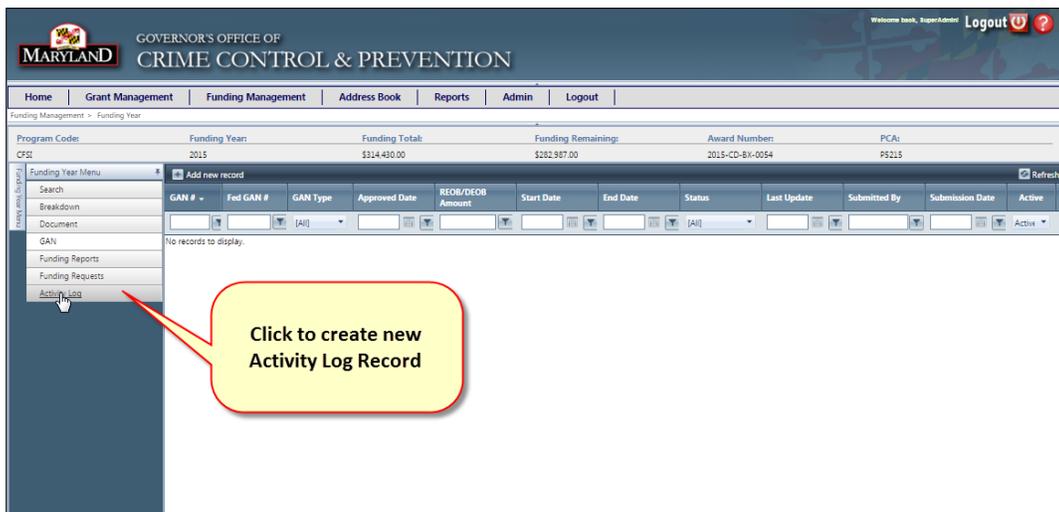


Figure 75 – Access Activity Log from Funding Year Menu

Any existing Activity Log records are displayed in the Data Entry screen on the right. The following information is displayed in columns for each record:

ACTIVITY LOG RECORD DISPLAY FIELDS	
Classification	This field displays the classification for an activity log record – <b>Internal</b> or <b>External</b> .
Activity Type	This field describes the nature of the activity log record – Types include <b>Info Requested, Info Received, Sent Non-Funding, Correspondence, Phone Conversation, Site Visit, Application Notes, Meeting Note, Other, Email, Award Note, Close Out, and GAN</b>
Subject	This field displays the subject that was entered when the record was created.
Notes	This field displays the free-form text notes that were entered when the record was created.

GOCCP Contact	This field displays the GOCCP contact that was selected when the record was created.
Contact	Enter the name of the external contact (if applicable).
Activity Date	This field displays the date the record was created.
Follow-Up Date	This field displays the follow-up date that was assigned when the record was created, if applicable.
Follow-Up	This field displays a checkmark in the box if the log entry was followed-up upon.
Edit	Click the pencil icon in this field to edit details of this activity log record.
Reply	Click the green plus sign icon in this field to create a <b>New Activity Log</b> record that will be tied to the log in this record.

- Click the Add new record icon in the top left corner of the Data Entry screen.

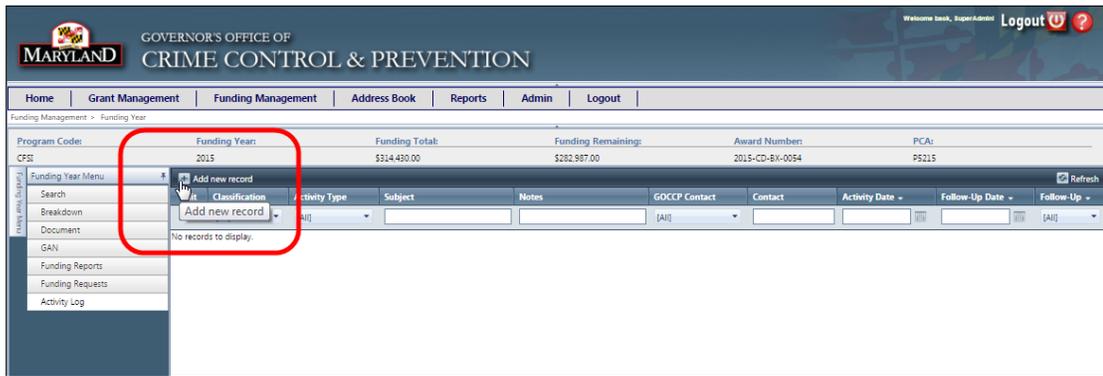


Figure 76 - Add New Activity Log Record

Upon clicking *Add new record*, the data entry screen appears:

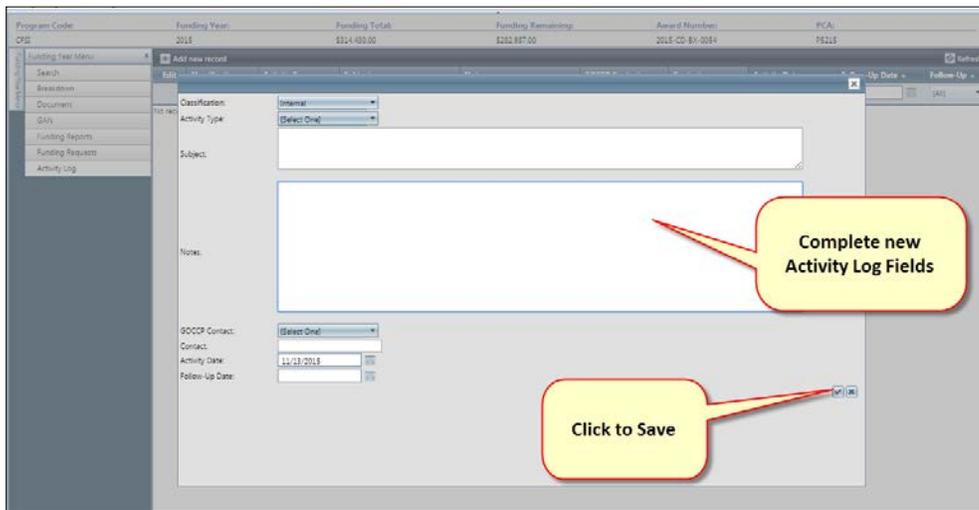


Figure 77 - Add New Activity Log Record - Data Entry Screen

- Complete each field in the initial data entry screen for the new Activity Log record as follows:

ACTIVITY LOG TAB – “ADD NEW RECORD” FIELDS	
Classification	Click the dropdown list and select either <b>Internal</b> or <b>External</b> .
Activity Type	Click the dropdown list and select one of the following Activity Types: <b>Info Requested</b> , <b>Info Received</b> , <b>Sent Non-Funding</b> , <b>Correspondence</b> , <b>Phone Conversation</b> , <b>Site Visit</b> , <b>Application</b>

	<b>Notes, Meeting Note, Other, Email, Award Note, Close Out, and GAN.</b>
GOCCP Contact	Click the dropdown list and select the GOCCP contact relevant to this record.
Contact	Enter your name here as the creator of the activity log record.
Activity Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Follow-Up Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Subject	Enter a brief description of the subject of this activity log entry into this field.
Notes	Enter any relevant notes regarding the activity into this field.

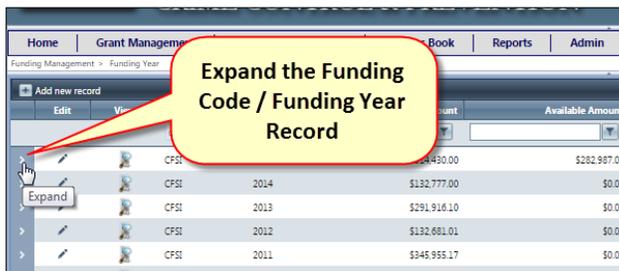
4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Activity Log record.

### 6.3.2 Admin Allowances (Access based on permission)

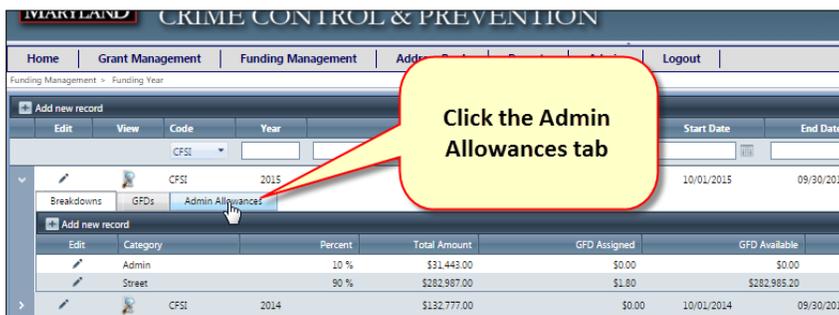
Admin Allowances are a new entity that function like an application that admin funding source breakdown funds can be applied to. They have a budget and their funds are gradually expended (like a financial report on a grant).

To create an Admin Allowance for a funding year:

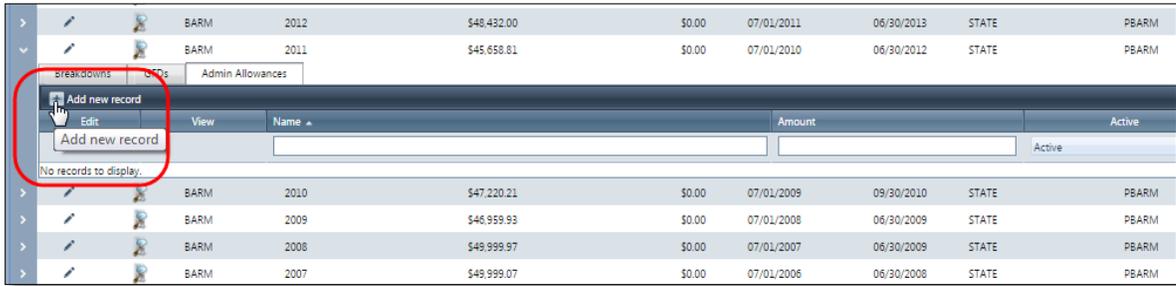
1. Locate and expand the funding code / funding year for which you want to add an Admin Allowance:



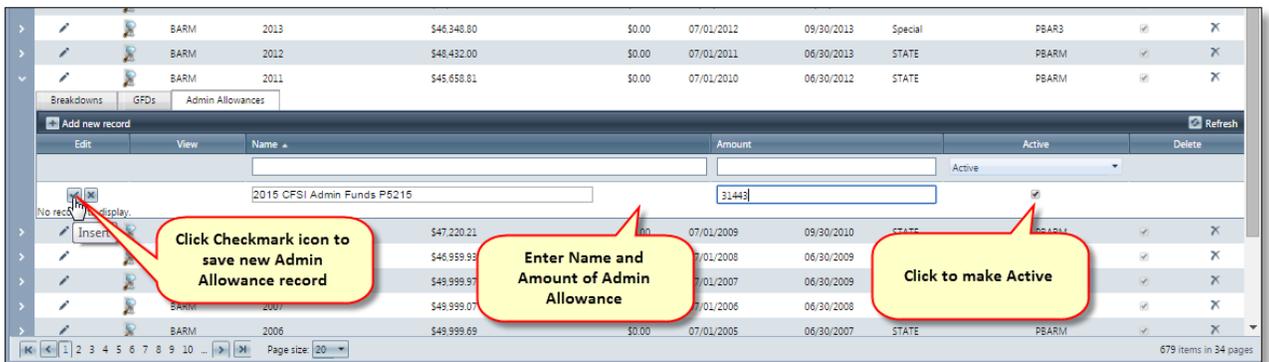
2. Click on the Admin Allowances tab:



- The empty fields associated with an Admin Allowance are shown. To add a new Admin Allowance, click on the Add new record button:



- Enter the Name and Amount of the Admin Allowance in the appropriate fields. To make the Admin Allowance active, click the checkbox under the Active column. When you are finished, click the Checkmark icon on the right side to save your record.



- The new Admin Allowance record appears under the funding code / funding year under which it was created:



### 6.3.2.1 Managing Admin Allowances

Because you can perform most activities of a Funding Year to an Admin Allowance, the Admin Allowance has its own menu. To access the Admin Allowances menu:

1. Expand the funding year which contains the Admin Allowance:

The screenshot shows a table with columns for funding year, organization code, award amount, available amount, and start/end dates. A yellow callout box labeled 'Expand Funding Year' points to the 'Expand' icon on the left side of the row for BARM 2015.

Organization	Year	Award Amount	Available Amount	Start Date	End Date
BARM	2013	\$46,348.80	\$0.00	07/01/2012	
BARM	2012	\$48,432.00	\$0.00	07/01/2011	
BARM	2011	\$58.81	\$0.00	07/01/2010	
BARM	2010	\$0.21	\$0.00	07/01/2009	
BARM	2009	\$9.93	\$0.00	07/01/2008	
BARM	2008	\$9.97	\$0.00	07/01/2007	
BARM	2007	\$9.07	\$0.00	07/01/2006	
BARM	2006	\$99.69	\$0.00	07/01/2005	
BARM	2005	\$49,999.77	\$0.00	07/01/2004	
BCCP	2016	\$1,974,000.00	\$0.00	07/01/2015	
BCCP	2015	\$1,974,000.00	\$0.00	07/01/2014	
BCCP	2014	\$1,974,000.00	\$0.00	07/01/2013	

2. Click on the Admin Allowances tab:

The screenshot shows the 'Admin Allowances' sub-table for the 2015 BARM funding year. A yellow callout box labeled 'Click on the Admin Allowances Tab' points to the 'Admin Allowances' tab in the sub-menu.

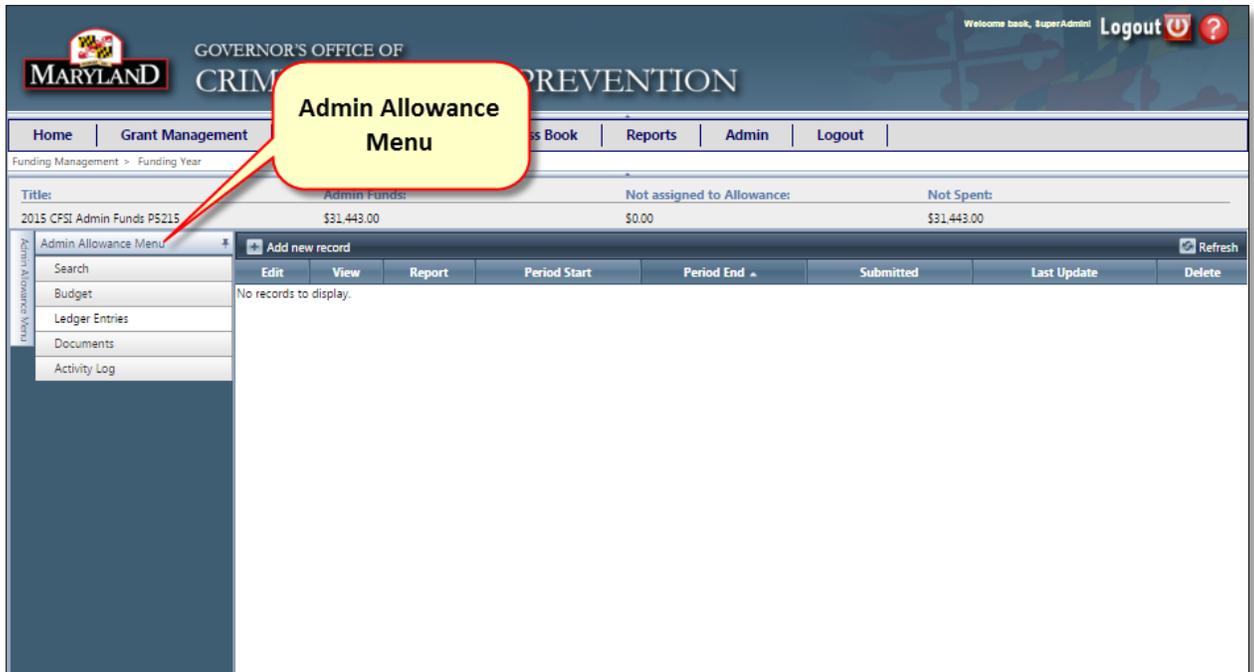
Category	Percent	Awarded	GFD Available	Awarded
Admin	10 %	\$0.00	\$0.00	\$0.00
Street	90 %	\$1.80	\$282,985.20	\$0.00

3. Click on the Magnifying Glass icon in the Admin Allowance row you wish to see:

The screenshot shows a list of Admin Allowance rows. A yellow callout box labeled 'Click on the Magnifying Glass icon in the Admin Allowance row' points to the magnifying glass icon on the left side of the row for '2015 CFSI Admin Funds P5215'.

Year	Amount	Active	Delete
2015 CFSI Admin Funds P5215	\$31,443.00	Active	X
2014 CFSI	\$132,777.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$0.00	Active	X
CFSI	\$300,915.44	Active	X

4. The Admin Allowance you selected is shown on the screen with its own menu – the Admin Allowance Menu:



From here, you can create budget and ledger entries, add documents and add logs of your activity on this Admin Allowance.

### 6.3.3 View Funding Years

1. From your Home screen, select **Funding Year** from the Funding Management menu.



2. The Funding Year page displays all Funding Year records, each uniquely identified by the combination of the Funding Program and Year. If the life of a Funding Program spans several years, there will be one record for each year that program has been funded. Refer to the table below for a description of the column headings for each Funding Year record.

Figure 78 - Funding Year Main Page

FUNDING YEAR TOP-LEVEL SCREEN DISPLAY FIELDS	
Edit	Click on the pencil icon in this column to edit an existing Funding Year record (refer to the procedure <a href="#">Edit a Funding Year</a> later in this section).
View	Click on the magnifying glass icon in this column to enter the Funding Year Menu and Data Entry Screen for an existing Funding Year record.
Code	This field displays the system code that uniquely identifies a Funding Program in GMS, which is set up and maintained in the Funding Management → Funding Programs menu. For example, <b>BCCP</b> is the code for the <b>Baltimore City Community Policing</b> Funding Program.
Year	This field displays the year that GOCCP has received dollars for the Funding Program in this record. As shown with <i>example data</i> in the figure above, the BCCP Funding Program has been funded for nine years so far (2005 – 2013) so there are nine Funding Year records, one for each program+year ( <b>BCCP+2005</b> , <b>BCCP+2006</b> , etc.).
Award Amount	This field displays the total amount that GOCCP has received for the funding program and the year defined in this Funding Year record.
Available Amount	This field displays the <b>Award Amount</b> of this Funding Year record minus: 1) The amount already awarded to sub-recipients of the GFD based on this funding year and 2) The amount reserved for administration by GOCCP.
Start Date	This field displays the first day that funding will be available for this Funding Year and associated GFD.
End Date	This field displays the last day that funding will be available for this Funding Year and associated GFD.
Award Number	This field displays a GOCCP-assigned Award Number which is tied to the Funding Program for this Funding Year record. It is a free-form text field, example values are <b>STATE</b> for a state funding program, or <b>2011-JB-xx-xxxx</b> (funding year, funding program code + etc.)
PCA	This field displays the Program Cost Account (PCA) associated with this Funding Year record.
Active	This field indicates whether this Funding Year record is <b>Active</b> or <b>Inactive</b> .
Delete	Click on the X icon in this column to delete an existing Funding Year record (refer to the procedure <a href="#">Delete a Funding Year</a> later in this section).

### 6.3.4 Edit a Funding Year

You can edit a Funding Year record at any time; you can edit the high-level details by clicking the pencil icon in the Edit column, or you can View, Edit, or Add Breakdown, Document, GAN, or Activity Log records for a Funding Year by clicking on the magnifying glass icon in the View column:

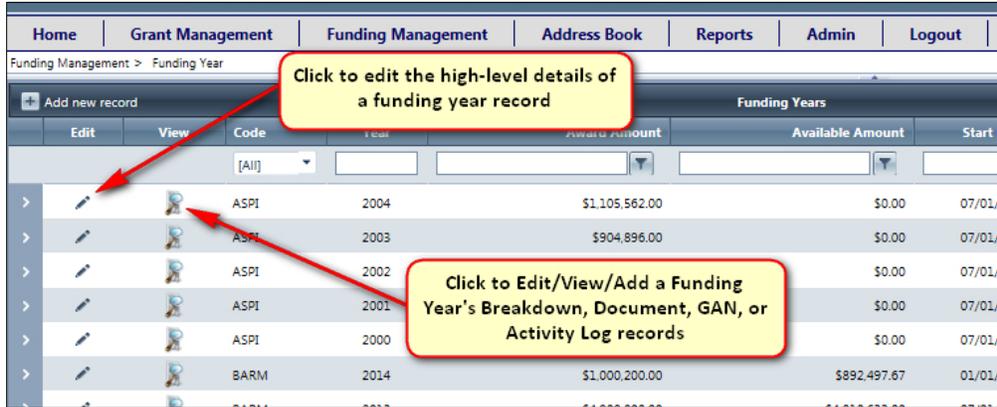


Figure 79 - Edit a Funding Year Record

To edit detail records (GAN/Breakdown/etc) for a Funding Year, refer to the instructions in the sections **Add a Breakdown Record to a Funding Year**, **Attach a Document to a Funding Year**, **Add a Grant Adjustment Notice (GAN) to a Funding Year**, and **Add an Activity Log entry to a Funding Year**. In the screens for each of these procedures, instead of clicking on Add New Record, locate the record you wish to edit and click on the pencil icon in the Edit column.

To edit the high-level details of a Funding Year record:

1. From your Home screen, select **Funding Year** from the Funding Management menu.



2. The Funding Year page displays all Funding Year records, each uniquely identified by the combination of the Funding Program and Year. If the life of a Funding Program spans several years, there will be one record for each year that program has been funded. Refer to the table below for a description of the column headings for each Funding Year record.

Edit	View	Code	Year	Award Amount	Available Amount	Start Date	End Date	Award Number	PCA	Active	Delete
>		ASPI	2004	\$1,105,562.00	\$0.00	07/01/2003	06/30/2007	STATE	PSOAS	<input checked="" type="checkbox"/>	
>		ASPI	2003	\$904,896.00	\$0.00	07/01/2002	06/30/2004	STATE	PSOAS	<input checked="" type="checkbox"/>	
>		ASPI	2002	\$1,134,600.00	\$0.00	07/01/2001	06/30/2010	STATE	PSOAS	<input checked="" type="checkbox"/>	
>		ASPI	2001	\$1,168,877.00	\$0.00	07/01/2000	06/30/2004	STATE	PSOAS	<input checked="" type="checkbox"/>	
>		ASPI	2000	\$1,103,586.00	\$0.00	07/01/1999	06/30/2003	STATE	PSOAS	<input checked="" type="checkbox"/>	
>		BARM	2014	\$1,000,200.00	\$892,497.67	01/01/2012	11/30/2012	212-BXP-A4321		<input checked="" type="checkbox"/>	
>		BARM	2013	\$4,908,800.00	\$4,810,633.00	07/01/2012	06/30/2013	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2012	\$49,088.00	\$95.50	07/01/2011	06/30/2013	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2011	\$45,658.81	\$0.00	07/01/2010	06/30/2012	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2010	\$47,220.21	\$0.00	07/01/2009	06/30/2010	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2009	\$46,959.93	\$0.00	07/01/2008	06/30/2009	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2008	\$49,999.97	\$0.00	07/01/2007	06/30/2009	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2007	\$49,999.07	\$0.00	07/01/2006	06/30/2008	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2006	\$49,999.69	\$0.00	07/01/2005	06/30/2007	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BARM	2005	\$49,999.77	\$0.00	07/01/2004	06/30/2007	STATE	PBARM	<input checked="" type="checkbox"/>	
>		BCCP	2013	\$1,974,000.00	\$1,974,000.00	07/01/2012	06/30/2013	STATE	PBCCP	<input checked="" type="checkbox"/>	
>		BCCP	2012	\$1,974,000.00	\$0.00	07/01/2011	06/30/2013	STATE	PBCCP	<input checked="" type="checkbox"/>	
>		BCCP	2011	\$1,974,000.00	\$0.00	07/01/2010	06/30/2012	STATE	PBCCP	<input checked="" type="checkbox"/>	
>		BCCP	2010	\$1,974,000.00	\$0.00	07/01/2009	06/30/2010	STATE	PBCCP	<input checked="" type="checkbox"/>	
>		BCCP	2009	\$2,000,000.00	\$0.00	07/01/2008	06/30/2009	STATE	PBCCP	<input checked="" type="checkbox"/>	

Figure 80 - Funding Year Main Page

3. Click the pencil icon in the Edit column of the record you wish to edit.

Code:	ASPI	Application Submitted:	4/15/2003
Year:	2004	Award Received:	1/1/2000
Award Amount:	\$1,105,562	Letter Of Intent Received:	
Available Amount:	\$0	Award Accepted:	1/1/2000
Extensions Allowed:	0	Start Date:	7/1/2003
Reporting Frequency Programmatic:	Quarterly	End Date:	6/30/2007
Reporting Frequency Financial:	Quarterly	Funding Year Login:	
Award Number:	STATE	Funding Year Password:	
Requested Amount:	\$0	PCA:	PSOAS
Match Minimum:	\$0	Application Number:	N/A
Match Type:	Cash Match	File Location:	[Select One]
Match Required (%):		Admin Maximum:	\$0
Active:	<input checked="" type="checkbox"/>	Admin Percent:	0 %

Figure 81 - Edit a Funding Year

4. Make changes to any of the information in data entry screen fields for the Funding Year as follows:

**FUNDING YEAR – “EDIT” FIELDS**

Code	Dropdown List: Select the code for the <b>Funding Program</b> that this Funding Year will be based upon.
Year	Type in the four-digit year that applies to this Funding Year record.
Award Amount	Type in the total amount that GOCCP has received for the funding program selected for this Funding Year record.
Available Amount	Display Only: This field displays the <b>Award Amount</b> of this Funding Year record minus: 1) The amount already awarded to sub-recipients of the GFD based on this funding year and 2) The amount reserved for administration by GOCCP.
Extensions Allowed	This is a free-form text field. Enter YES, NO, or a comment if required for this record.
Reporting Frequency Programmatic	Select the frequency with which sub-recipients will be required to perform <b>Programmatic</b> Reporting for awarded grants based on this Funding Year. The choices are <b>Monthly, Quarterly, Semi-Annually, and Annually</b> .
Reporting Frequency Financial	Select the frequency with which sub-recipients will be required to perform <b>Financial</b> Reporting for awarded grants based on this Funding Year. As with programmatic reporting, the choices are <b>Monthly, Quarterly, Semi-Annually, and Annually</b> .
Award Number	This is a free-form text field. Enter the GOCCP-assigned Award Number which is tied to the Funding Program for this Funding Year record.
Requested Amount	Enter the amount that GOCCP originally requested for this Funding Year record. This may or may not equal the <b>Award Amount</b> for this record.
Match Type	A sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food). Select the match type from the drop-down list: Select either <b>Cash Match, In-Kind Match, or Both</b> .
Match Minimum	Enter the dollar amount a sub-recipient must provide in matching funds for a grant based on this funding year. If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in the <b>Match Required (%)</b> field and the dollar amount will automatically be added in this field.
Match Required (%)	If the match minimum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the <b>Match Minimum</b> field.
Active	Click the checkbox to make this Funding Year record <b>Active</b> .
Application Submitted	Enter the date the application for this Funding Year was submitted.
Award Received	Enter the date this Funding Year award was received.
Letter of Intent Received	Enter the date that the Letter of Intent for this Funding Year was received.
Award Accepted	Enter the date this Funding Year award was accepted.
Start Date	Enter the date of the first day that funding will be available for this Funding Year and associated GFD.
End Date	Enter the date of the last day that funding will be available for this Funding Year and associated GFD.
Funding Year Login	Enter the Login that GOCCP uses to access the system responsible for awarding funds for the Funding Program used in this Funding Year record.
Funding Year Password	Enter the Password associated with the <b>Funding Year Login</b> in this record.
PCA	Enter the Program Cost Account (PCA) associated with this Funding Year record. This is generally the four-digit Funding Program code associated with this Funding Year record preceded by a "P", for example <b>PATFP</b> .
Application Number	Enter the application number that the funding agency assigned to your application for funding year dollars for the Funding Program in this record.
File Location	Choose either " <b>Grant Manager's Room</b> ", " <b>Archives A8</b> ", "File Room 1" or "File Room 2" from the drop-down list to select the physical location of the file for

	this Funding Year record.
Admin Maximum	Enter the maximum portion (in dollars) of the <b>Award Amount</b> for this Funding Year that can be allocated to GOCCP for administrative purposes. If you do not have a dollar amount but rather a percentage, enter the percentage in the <b>Admin Percent</b> field in this record; doing so will automatically populate this field with the correct dollar amount.
Admin Percent	If the Admin Maximum amount is provided to you as a percent of the overall funding year amount, enter that percentage in this field. The calculated dollar amount will automatically be added to the <b>Admin Maximum</b> field.
Comment	This is a free-form text field. Enter any notes or comments regarding this funding year that you would want other users to see when they view or edit this Funding Year record.

- Click the checkmark icon located in the lower right hand corner of the Data Entry screen to update the Funding Year.

### 6.3.5 Delete a Funding Year

With proper system permission, you can delete a Funding Year by clicking on the X icon in the Funding Year row. After clicking the X, a “Delete this Funding Year?” confirmation message is displayed.

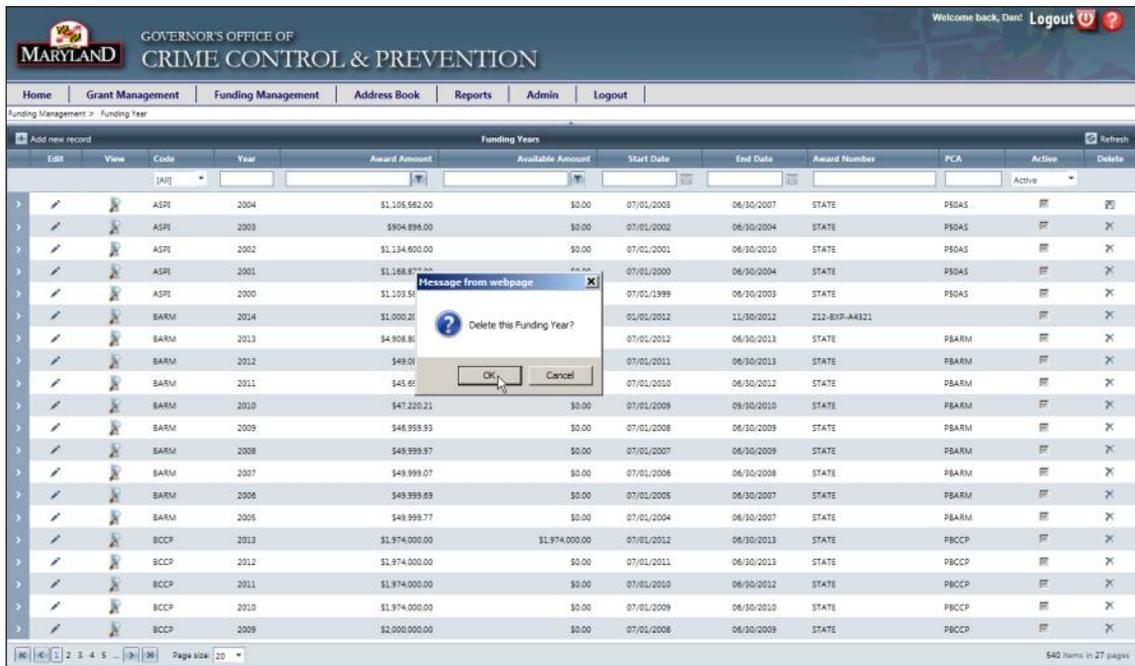


Figure 82 - Delete a Funding Year

- Click the OK button to delete the Funding Year.
- If you click the Cancel button, the record is not deleted and you are returned to the Funding Year list.

## 6.4 Grant Funds Distributions (GFD)

Grant Funds Distribution records appear in the Available Funding dashboard of all GMS users' Home Page. They are based on Funding Programs/Funding Years, and each has a NOFA document attached to it that is the printable, hardcopy guide to the available funding. After creating a Funding Source Breakdown based on funds allocated through a Funding Year, you can create a GFD that sub-recipients will use to apply for a grant.

This section provides instructions for viewing, creating, editing, and deleting GFDs.

### 6.4.1 Create a GFD

A GFD is created from a Funding Program & Funding Year. If you are creating a new GFD, be sure that the new Funding Program has already been created and finalized and has money allocated to it via a Funding Year.

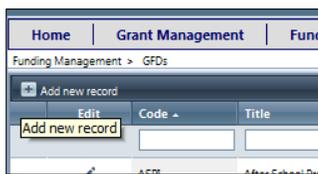
The first step in creating a new GFD is to add a new GFD record and provide high-level detail information. After that, you will edit the record and provide the following information:

- Funding (Allocate money to the GFD)
- Budget (Select budgetary items that sub-recipients will need to supply)
- Organizations (Designate specific organizations that can apply for grants based on the GFD. Note: if you do not designate organizations, all organizations can apply.)
- Documents (Attach a NOFA and, optionally, other documents to the GFD)
- Activity Log (Optionally create activity log entries that detail correspondence or other items)

After you complete these tasks, you can Finalize the GFD and make it available. Instructions for performing each of these tasks are provided in the following sections.

#### 6.4.1.1 Add a New GFD Record

1. From the GFD list, click on the *Add new record* link in the upper left hand corner of the Funding Year process area, above the column headers.



Upon clicking *Add new record*, the data entry screen appears:

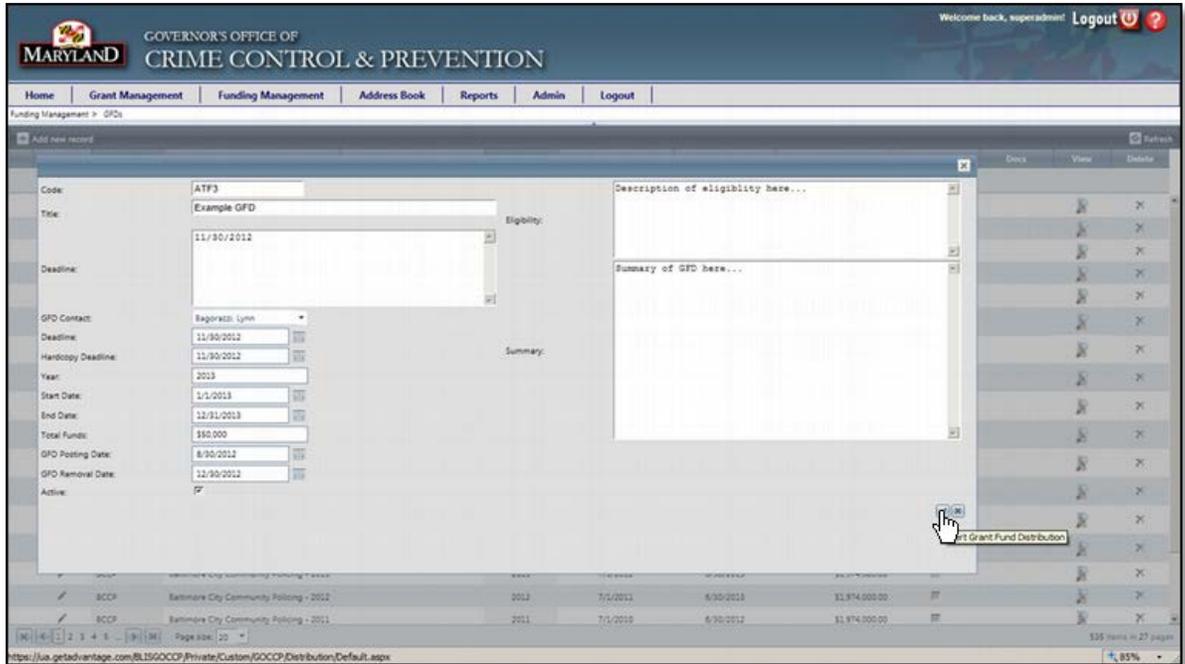


Figure 83 - Add New GFD - Data Entry Screen

- Complete each field in the initial data entry screen for the new GFD as follows:

GFD - "ADD NEW RECORD" FIELDS	
<sup>1,2</sup> Code	Enter the 4 to 9 Character NOFA code (usually the primary funding program).
<sup>1,2</sup> Title	Enter the <b>Funding Year</b> title that the GFD is based on.
<sup>1</sup> Deadline	Verbose description of deadlines (hardcopy and electronic dates/times). Free form text box.
<sup>2</sup> GFD Contact	Select the name of the GOCCP contact who is responsible for managing the GFD from the dropdown list.
<sup>1,2</sup> Deadline	Enter the date by which all grant applications based on this GFD must be submitted electronically.
<sup>1,2</sup> Hardcopy Deadline	Enter the date that GOCCP must receive hardcopies of grant applications by in order to be considered for awarding.
<sup>1,2</sup> Year	Enter a NOFA year (usually the same as the primary funding source's year).
<sup>1</sup> Start Date	Enter the date sub-awards would start.
<sup>1</sup> End Date	Enter the date sub-awards would end.
Total Funds	Enter the <b>Total Amount</b> of funding that will be available for sub-recipients to apply for grants against for the GFD. This is not visible to external users.
GFD Posting Date	Enter the date that the GFD will become available and be displayed in the Available Funding dashboard of the GMS home page.
GFD Removal Date	Enter the date that the GFD will be removed and no longer available.
<sup>1</sup> Active	Click to place a checkmark in the box and designate the GFD as <b>Active</b> .
<sup>1</sup> Eligibility	This is a free-form text box. Enter any special eligibility requirements that sub-recipients must be made aware of when applying for a grant based on the GFD.
<sup>1</sup> Summary	This is a free-form text box. Enter a brief summary of the GFD that users will see when they click on the View icon for a GFD in the Available Funding dashboard.

<sup>1</sup>Denotes fields which will be visible to external users

<sup>2</sup>Denotes fields which are required to save the initial GFD record

- Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the GFD.



Press the X to cancel – you will lose any information you entered for the new GFD if you cancel.

- Upon saving the new record, you are returned to the GFD home screen and will see the new record in the list.

Edit	Code	Title	GFD Contact	Year	Start Date	End Date	Total Funds	Active	Docs	View	Delete
/	ASPI	After School Program Initiative - 2004		2004	7/1/2003	6/30/2007	\$1,205,662.00	☑		👤	✕
/	ASPI	After School Program Initiative - 2003		2003	7/1/2002	6/30/2004	\$904,896.00	☑		👤	✕
/	ASPI	After School Program Initiative - 2002		2002	7/1/2001	6/30/2010	\$1,134,600.00	☑		👤	✕
/	ASPI	After School Program Initiative - 2001		2001	7/1/2000	6/30/2004	\$1,168,877.00	☑		👤	✕
/	ASPI	After School Program Initiative - 2000		2000	7/1/1999	6/30/2003	\$1,203,586.00	☑		👤	✕
/	ATFS	Example GFD	Bagonzzi, Lynn	2013	1/1/2013	12/31/2013	\$50,000.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2013	Aboodine, Noerena	2013	7/1/2012	12/30/2013	\$49,088.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2012		2012	7/1/2011	6/30/2013	\$49,088.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2011		2011	7/1/2010	6/30/2012	\$46,659.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2010		2010	7/1/2009	6/30/2010	\$47,220.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2009		2009	7/1/2008	6/30/2009	\$46,960.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2008		2008	7/1/2007	6/30/2009	\$50,000.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2007		2007	7/1/2006	6/30/2008	\$49,999.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2006		2006	7/1/2005	6/30/2007	\$50,000.00	☑		👤	✕
/	BARM	Body Armor for Local Law Enforcement - 2005		2005	7/1/2004	6/30/2007	\$50,000.00	☑		👤	✕
/	BCCP	Baltimore City Community Policing - 2013		2013	7/1/2012	6/30/2013	\$1,974,000.00	☑		👤	✕
/	BCCP	Baltimore City Community Policing - 2012		2012	7/1/2011	6/30/2013	\$1,974,000.00	☑		👤	✕

Figure 84 - View New GFD Record in List

Before you can finalize a new GFD and make it available for grant applications, you must allocate money, select budget items, attach a NOFA, and optionally, designate organizations that can see the GFD and add any activity log items.

To begin, locate the new GFD record in the list and click the View icon associated with it. The GFD Menu appears to the left of the screen, and the process area corresponding to the Funding menu item appears in the right pane of the screen as shown below:

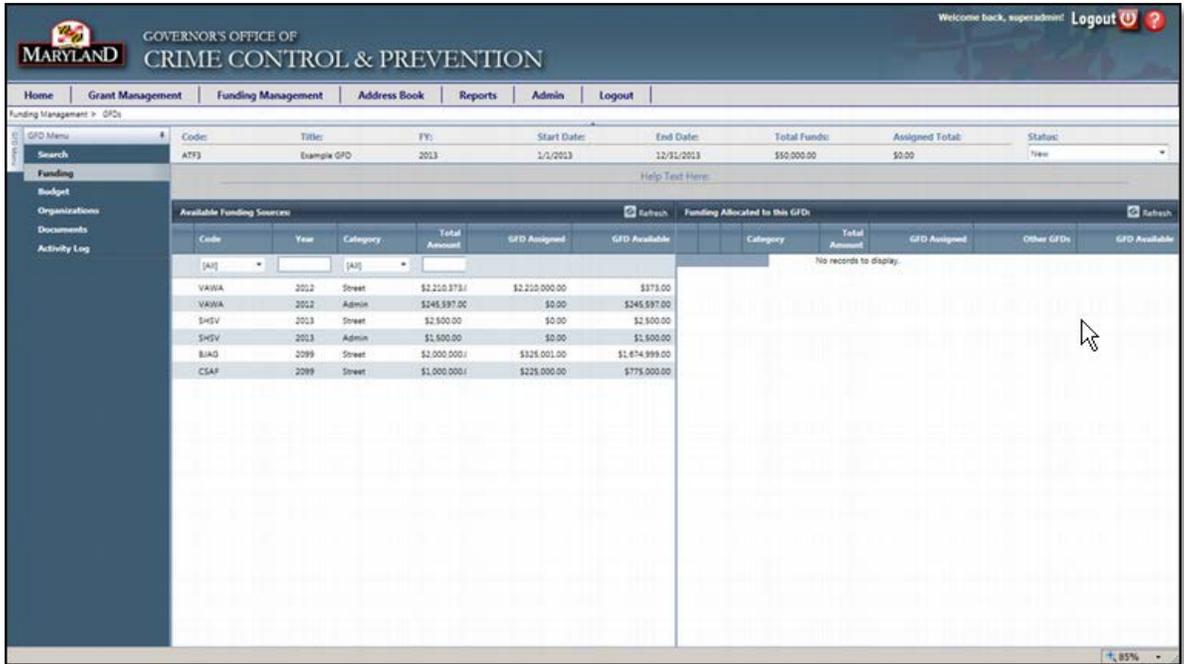


Figure 85 - GFD Menu and Process Area

#### 6.4.1.2 Assign Funding to a GFD

1. After clicking on Funding in the GFD Menu, the process area is divided into two parts. The left panel provides a list of Available Funding Sources. The right panel is "Funding Allocated to this GFD". Select the funding source from the left panel by clicking on the item and holding the mouse button down.

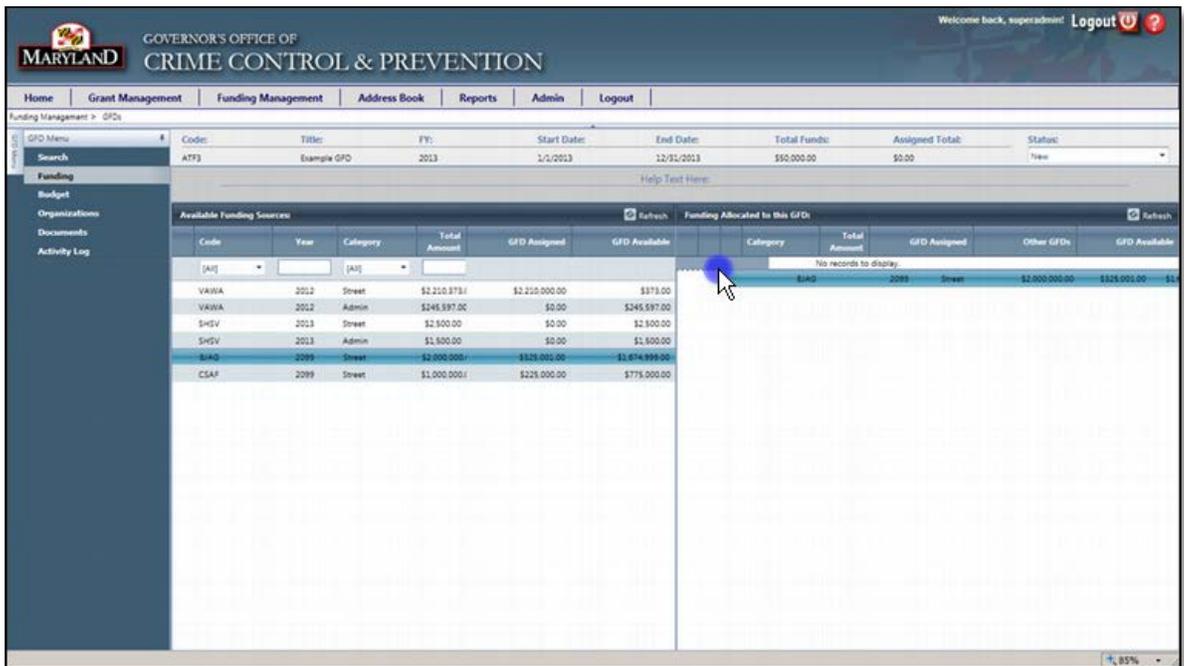


Figure 86 - GFD Menu -> Funding

- Drag the funding source item over to the right panel and release the mouse button. The “Specify Amount” dialog box appears – enter the dollar amount of the funding source you wish to allocate to this GFD, then click the Save button.

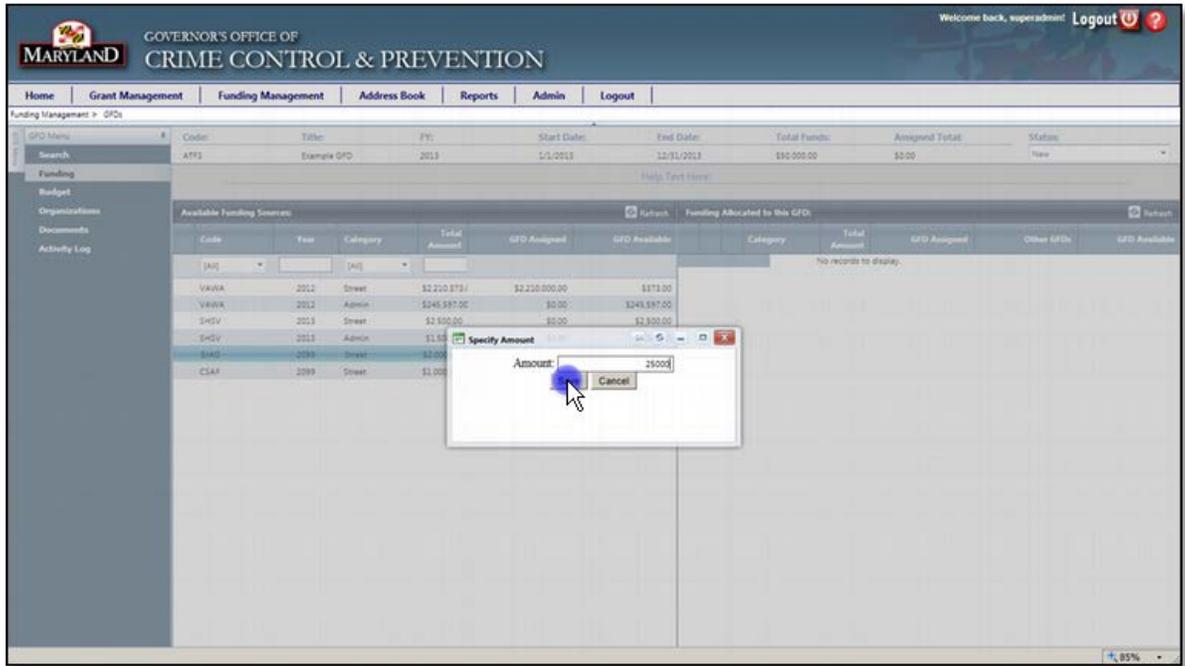


Figure 87 - Specify Amount of Allocation

- Your selection and the amount you chose for that funding source now appears in the right panel as funding allocated to this GFD.

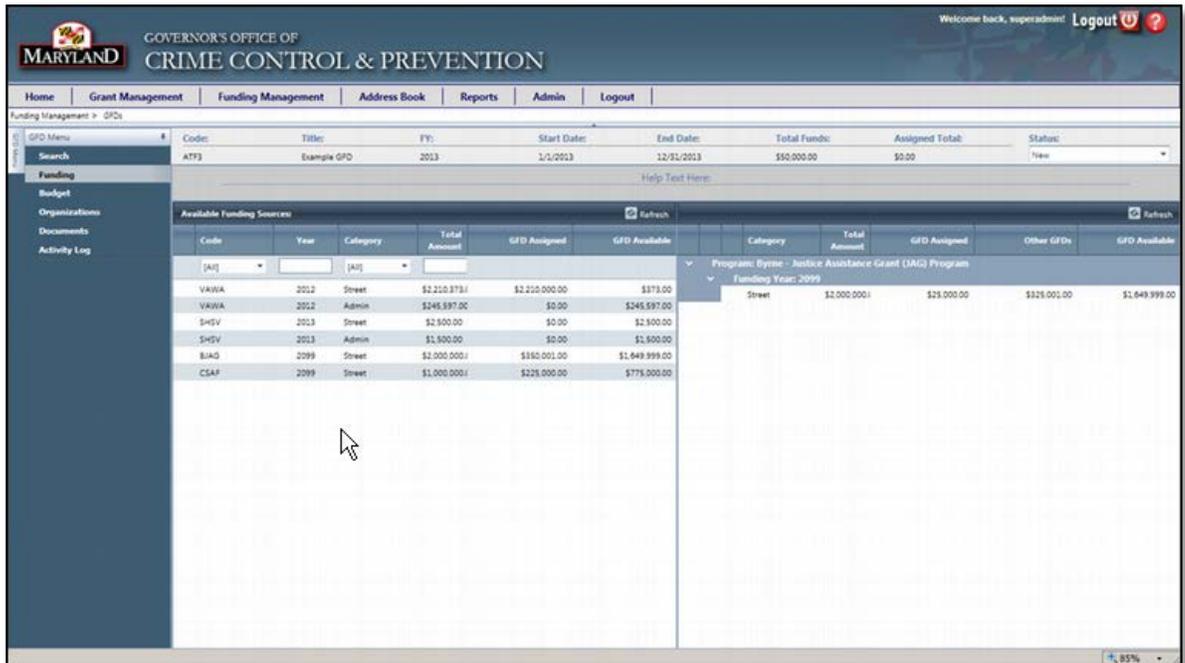


Figure 88 - Funding Successfully Allocated to GFD

- Because you can allocate multiple sources of funding for any given GFD, the funding records in the Funding Allocated to this GFD panel are grouped, first by Funding Program title, then by Funding Year:

Funding Allocated to this GFD: <span style="float:right">Refresh</span>				
Category	Total Amount	GFD Assigned	Other GFDs	GFD Available
Program: Body Armor for Local Law Enforcement				
Funding Year: 2013				
Street	\$49,053.00	\$49,053.00	\$0.00	\$0.00

Figure 89 - Funding Allocated to a GFD - Groupings

- In this example, the Funding Program chosen is Body Armor for Local Law Enforcement. The Funding Year set up for that program and used for this GFD is 2013. If another Funding Year for that program is chosen to fund this GFD as well, that funding year would be displayed as another sub-grouping of the funding program. This holds true if several Funding Programs/Years are used to fund this GFD – each Funding Program will display as its own group.

4. Repeat the procedure if you want to allocate funds from another source to this GFD:

Code	Year	Category	Total Amount	GFD Assigned	GFD Available
[AI]	[AI]				
VARI	2012	Street	\$2,210,373.00	\$2,210,000.00	\$373.00
VARI	2012	Admin	\$245,597.00	\$0.00	\$245,597.00
SHV	2013	Street	\$2,500.00	\$0.00	\$2,500.00
SHV	2013	Admin	\$1,500.00	\$0.00	\$1,500.00
BIAG	2099	Street	\$1,000,000.00	\$150,001.00	\$1,649,999.00
CSAF	2099	Street	\$1,000,000.00	\$225,000.00	\$775,000.00

Figure 90 - Add an additional funding source

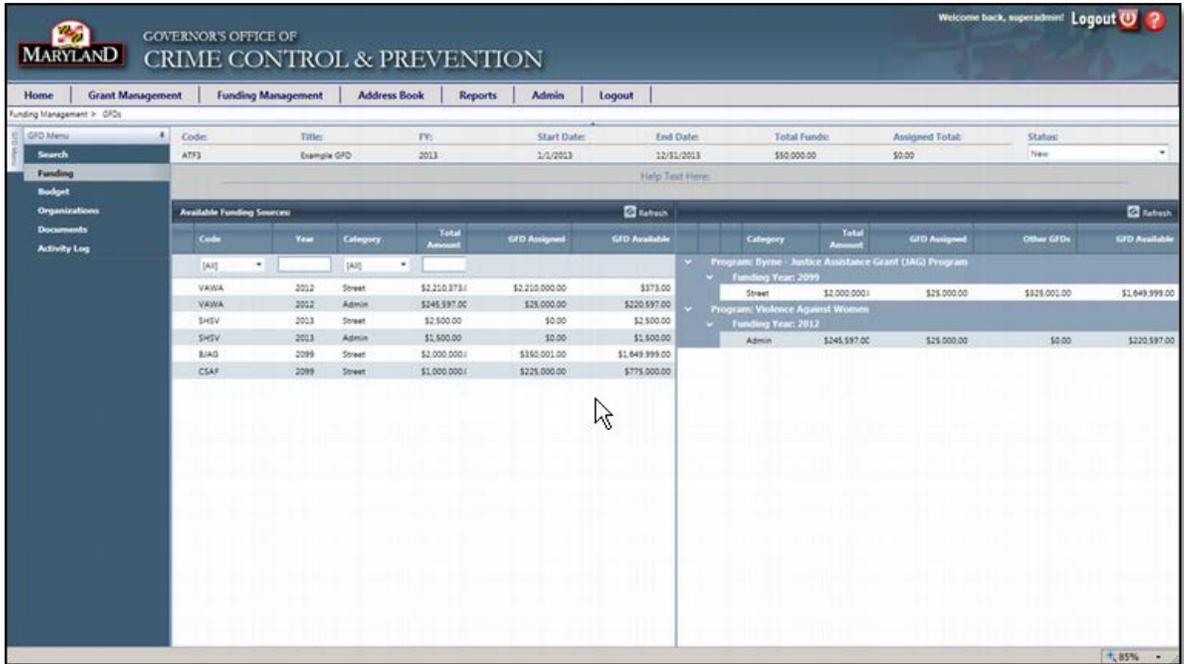


Figure 91 - Multiple Sources Allocated to a GFD

- At any time you can drag a selected funding source back to the Available panel to remove it from the Allocated panel if you selected it in error. Simply click on the item in the Allocated panel and hold the mouse button, drag it back over to the Available panel and release the mouse button as shown below.

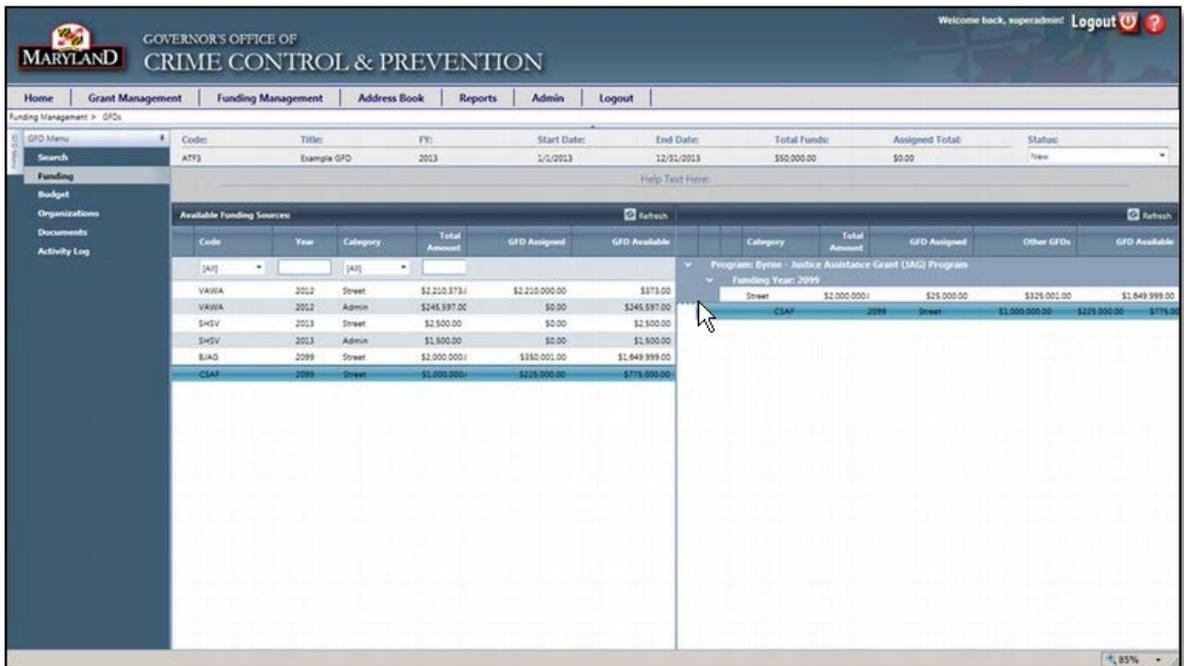


Figure 92 - Removing a Funding Source from the Allocated Panel – Click and Hold the mouse button down

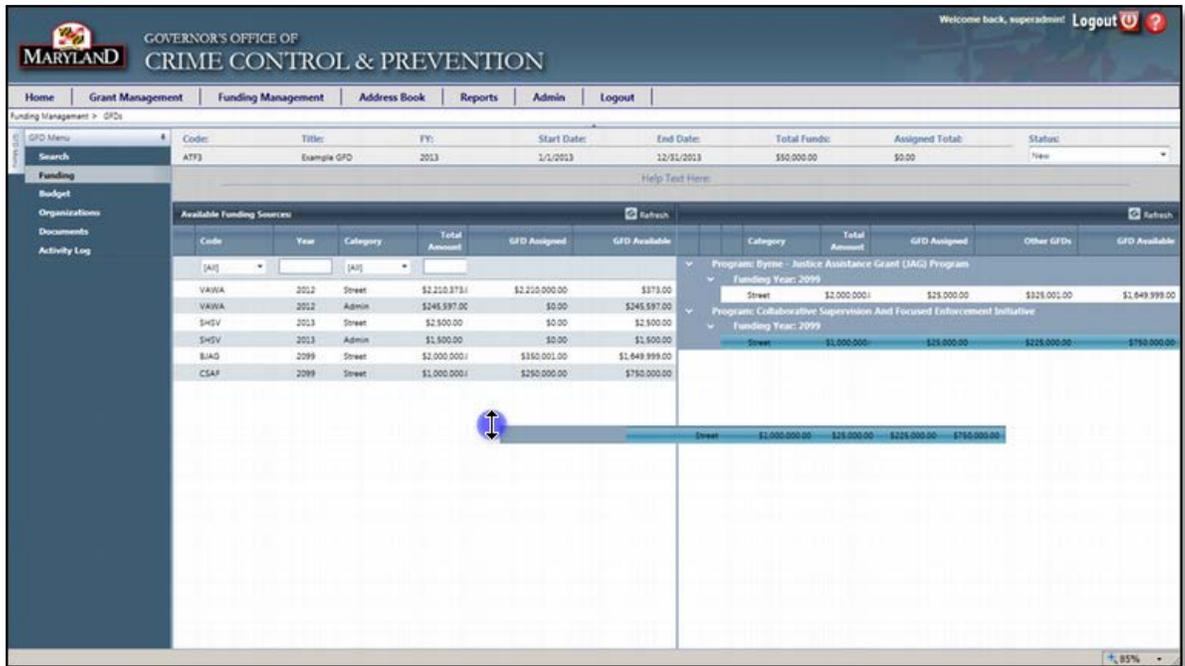


Figure 93 - Drag back to Available Panel & release mouse button

6. Allocating funding is persistent – changes are saved immediately.

#### 6.4.1.3 Assign Budget Categories to a GFD

1. Click the Budget menu item in the GFD Menu to assign budget categories to the GFD. This will define the categories that can be used in applications (i.e., BARM would have only equipment selected).

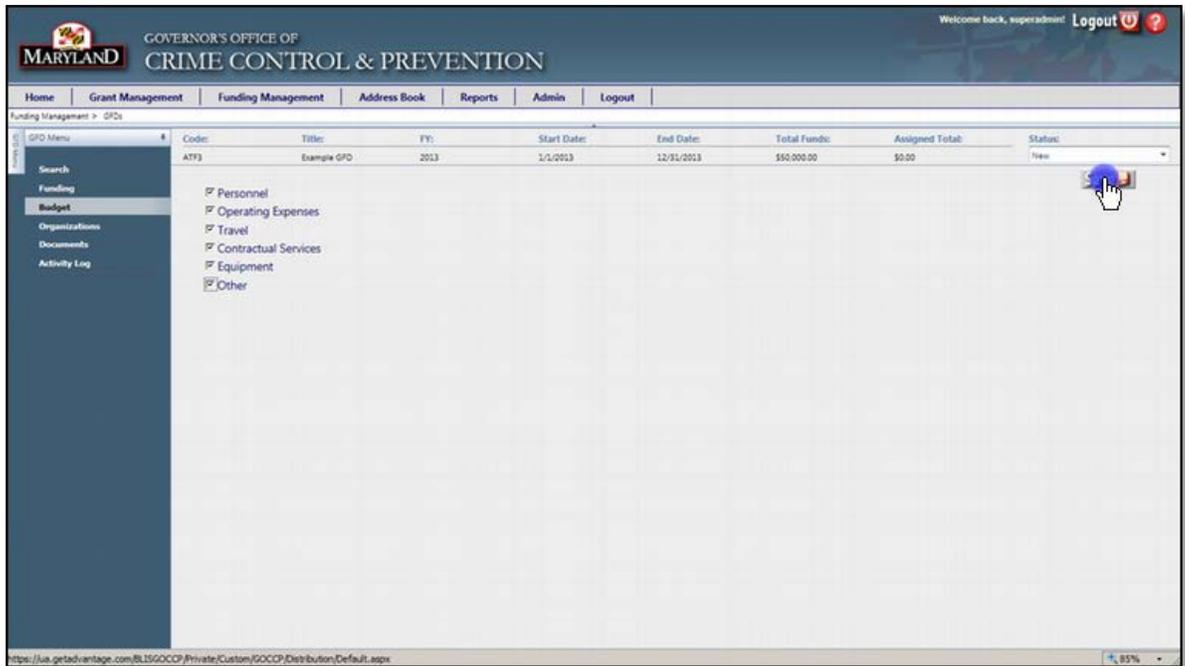


Figure 94 - Select Budget Items for the GFD

2. Click to place a checkmark in the Budget items you want to select for the GFD. When you are finished, click on the Save button to save your changes.

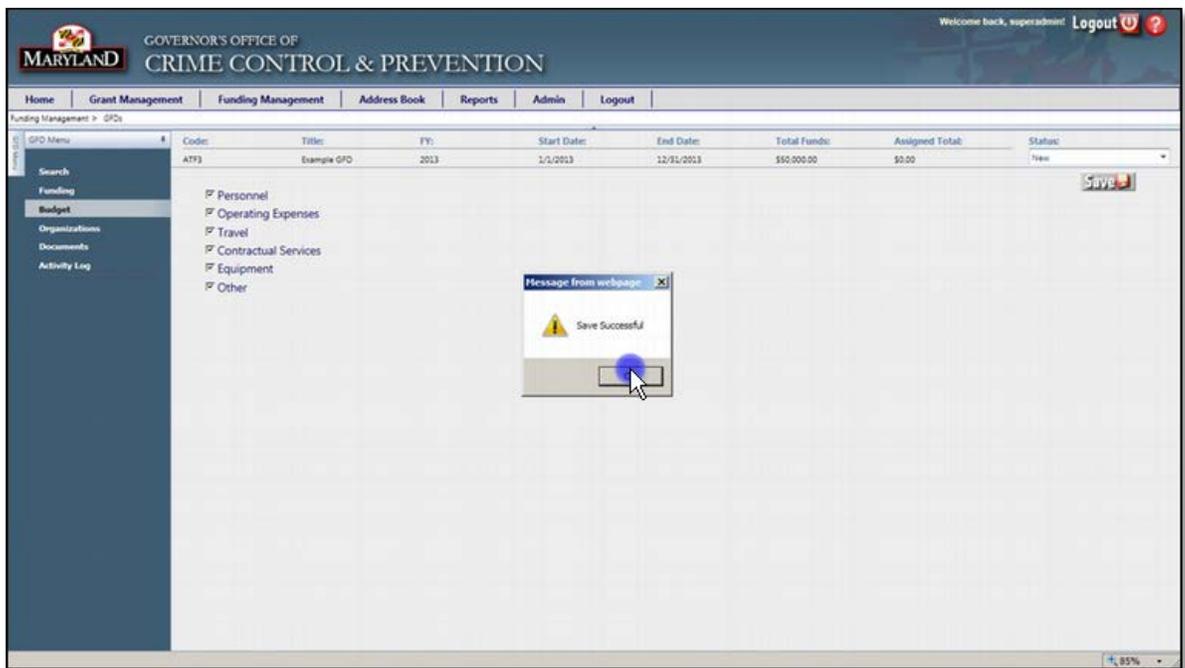


Figure 95 - Save Budget Category Selections

### 6.4.1.4 Add Organizations to a GFD

1. Click on Organizations in the GFD Menu to designate specific organizations that can apply for grants based on the GFD. This feature is helpful for continuation grants (MVOC), one-offs (PGVC), or narrowing to a specific sector (CAC). Note: if you do not designate any organizations, all can apply.

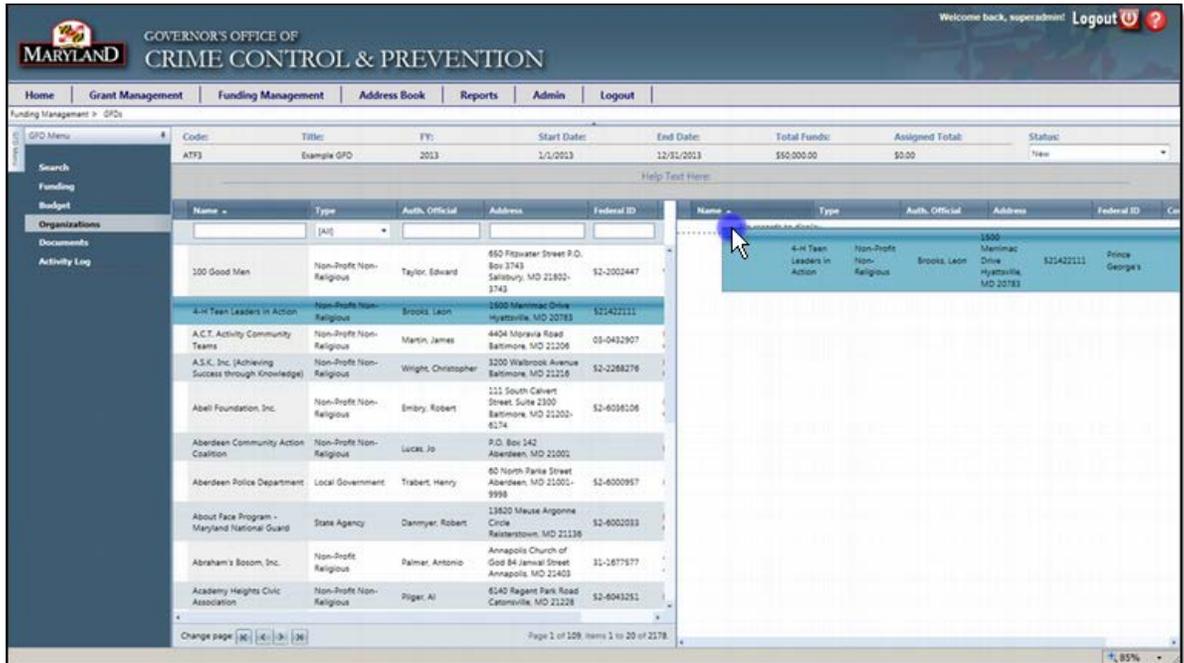


Figure 96 - Add Organizations to a GFD

2. Locate the Organization you wish to select for this GFD.
3. Left click on the record and hold the mouse button down.
4. Drag it over to the Selected Organizations panel.
5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
6. Repeat steps 2 through 5 for each Organization you wish to select for this funding program.

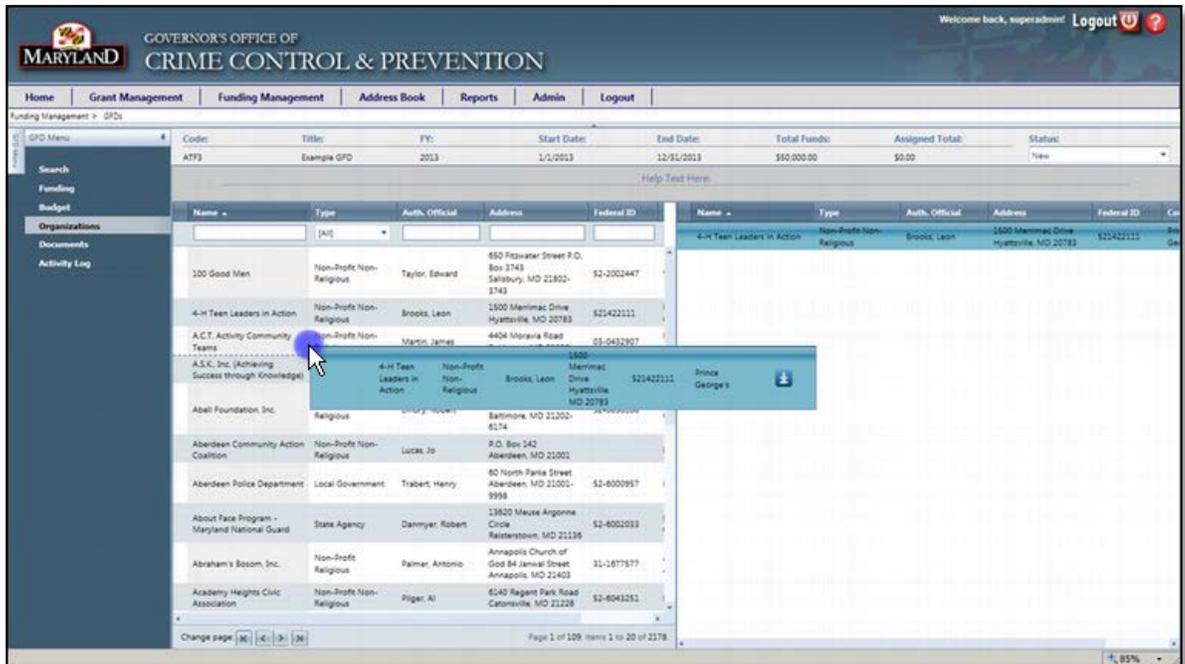


Figure 97 - Add Multiple Organizations to a GFD

### 6.4.1.5 Add Documents to a GFD

Use this screen to attach a NOFA and other supporting documents to a GFD.

1. Click Documents in the GFD Menu to the left of the screen.

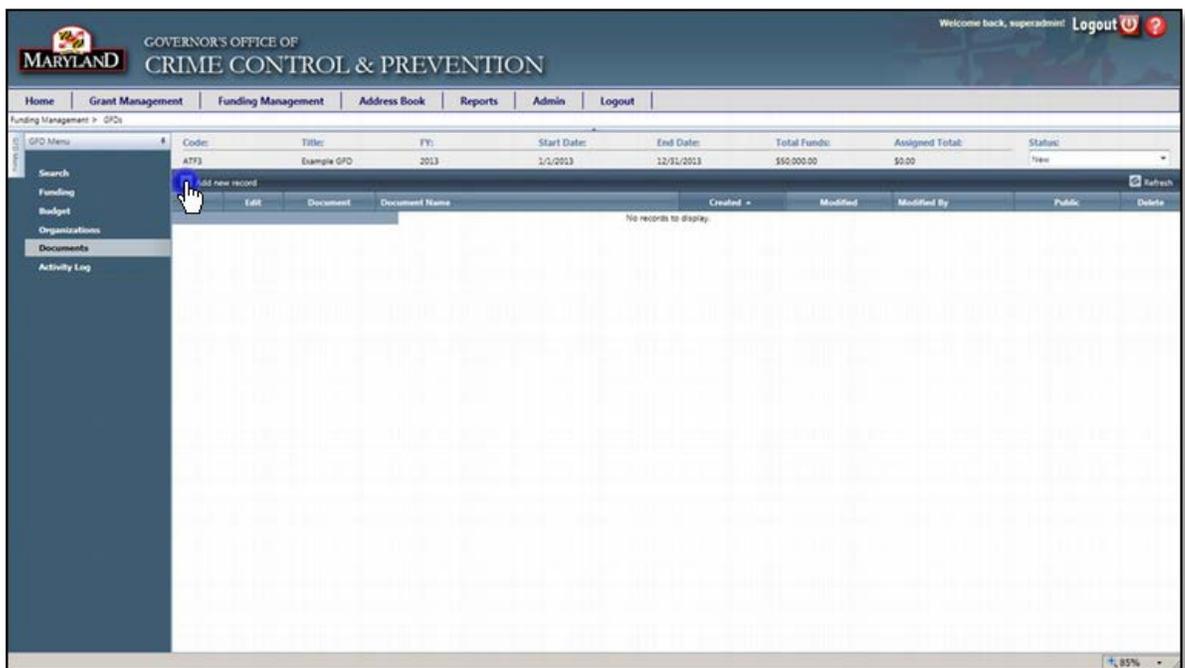


Figure 98 - Attach a Document to a GFD

2. Click the Add New Record icon to display the data entry screen. The data entry screen is shown:

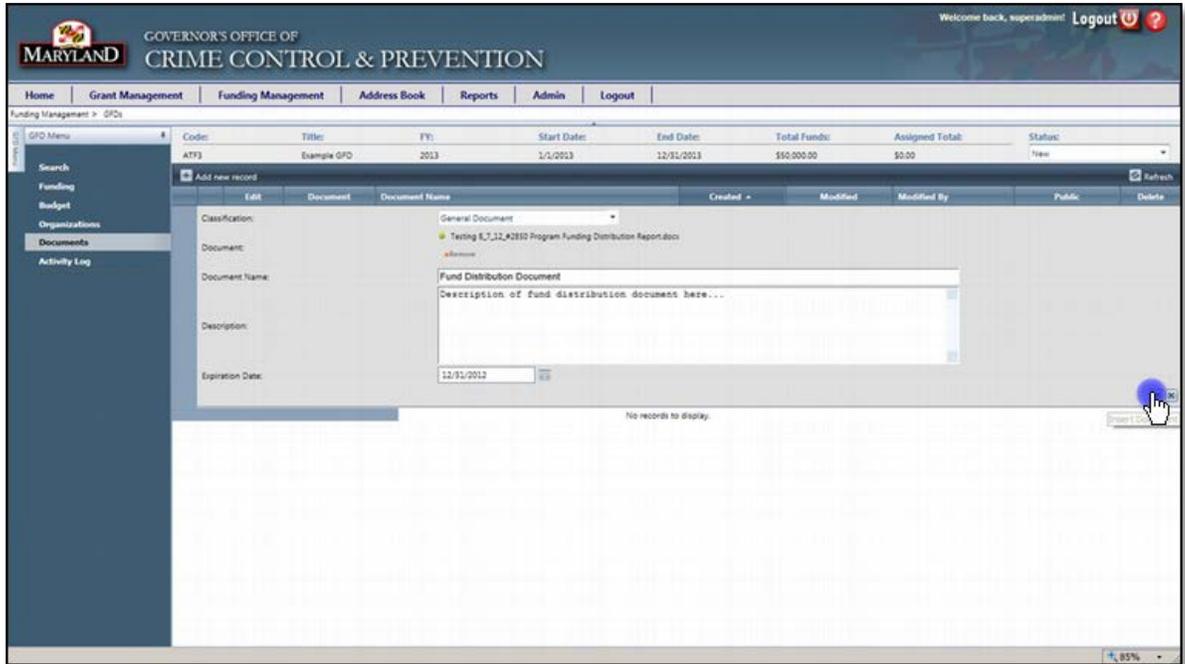


Figure 99 - Add Documents - Data Entry Screen

3. Select a classification for the document from the Classification drop-down list.
4. Type a descriptive name for the document in the Document Name field.
5. Click the Select button beside the Document field. This brings up a standard dialog box that allows you to search for the document on your hard disk and select it.
6. If applicable, click the calendar icon next to the Expiration Date field and choose a date by clicking on it
7. Type a description into the Description field.
8. Click the checkmark icon to the lower left of the screen to upload and save the document to the GFD. If you click on the cancel icon (X), the document will not be uploaded or saved and you'll be returned to the previous screen.

**Important Note:** As of 3/7/2013, if attaching multiple documents, the NOFA must be the last document attached. The last document attached will appear on the GMS homepage.

#### 6.4.1.6 Add an Activity Log entry to a GFD

1. Click the Activity Log tab to highlight it.

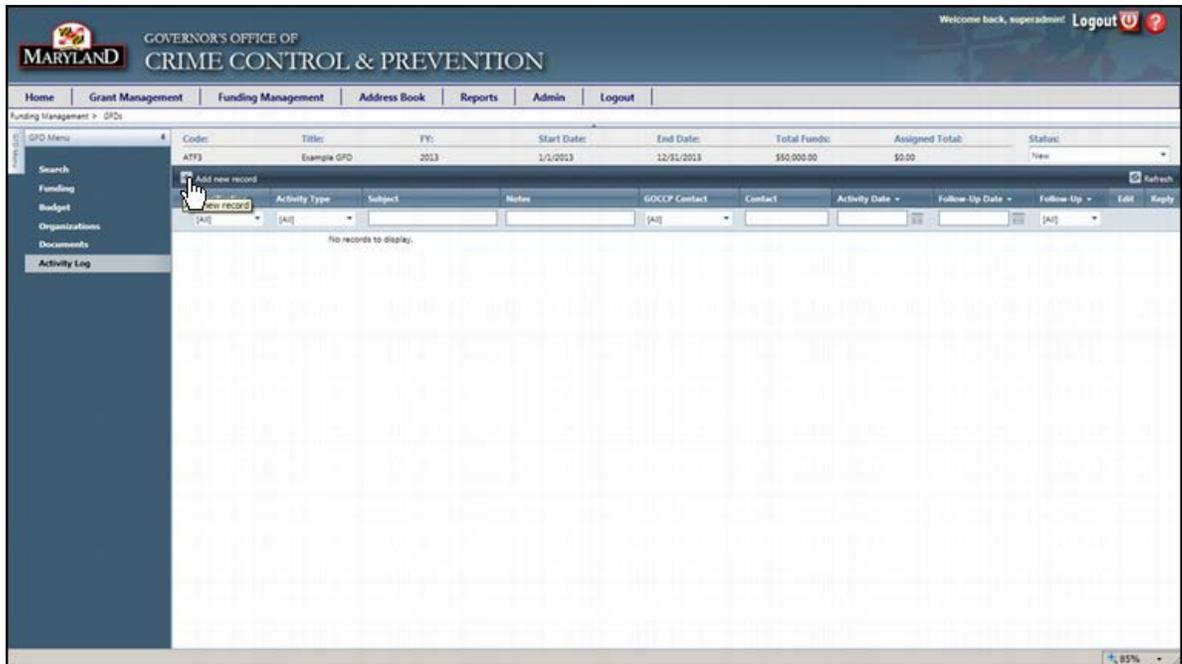


Figure 100 - Add an Activity Log entry to a GFD

2. Click Add new record below the Activity Log tab. Upon clicking *Add new record*, the data entry screen appears:

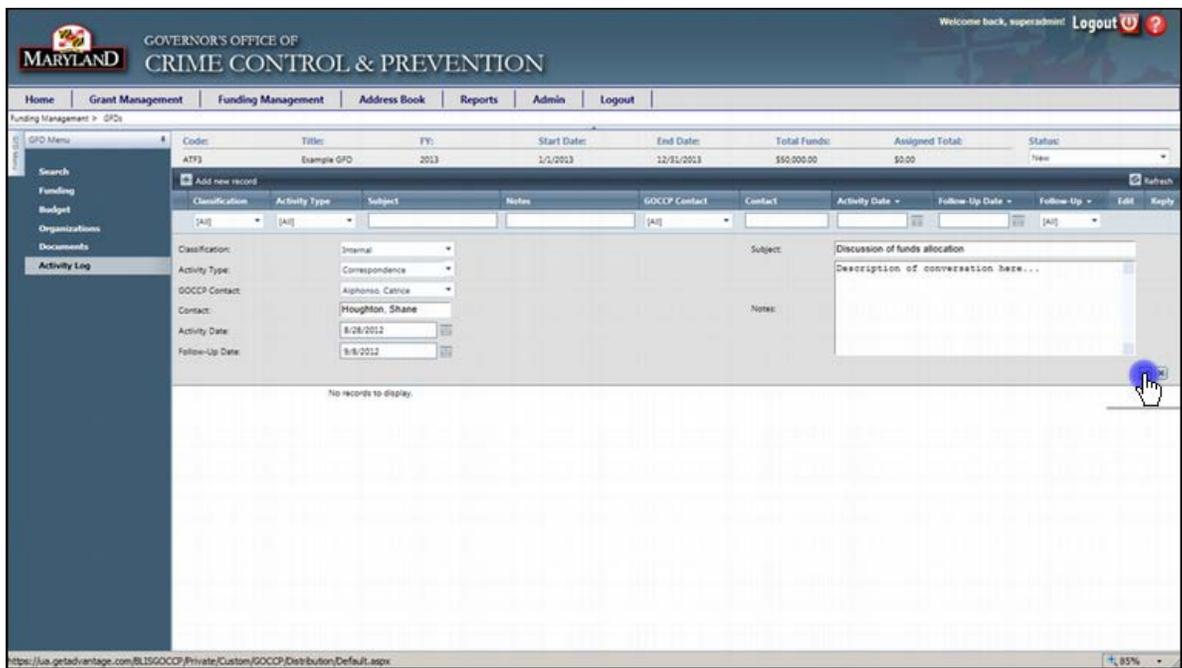


Figure 101 - GFD Activity Log - Data Entry Screen

3. Complete each field in the initial data entry screen for the new Activity Log entry as follows:

**ACTIVITY LOG ENTRY FIELDS**

Classification	Click the dropdown list and select either <b>Internal</b> or <b>External</b> .
Activity Type	Click the dropdown list and select one of the following Activity Types: <b>Info Requested, Info Received, Sent Non-Funding, Correspondence, Phone Conversation, Site Visit, Application Notes, Meeting Note, Other, Email, Award Note, Close Out, and GAN</b> .
GOCCP Contact	Click the dropdown list and select the GOCCP contact relevant to this record.
Contact	Enter the name of the external contact (if applicable).
Activity Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Follow-Up Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Subject	Enter a brief description of the subject of this activity log entry into this field.
Notes	Enter any relevant notes regarding the activity into this field.

4. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Activity Log record.

#### 6.4.1.7 Finalize a GFD

When you have completed each of the menu items in the GFD Menu, the GFD is ready for finalization in the GMS. Once final, it will appear in the Available Funding dashboard of users' GMS home page.

1. Click the Status dropdown box and select Finalize:

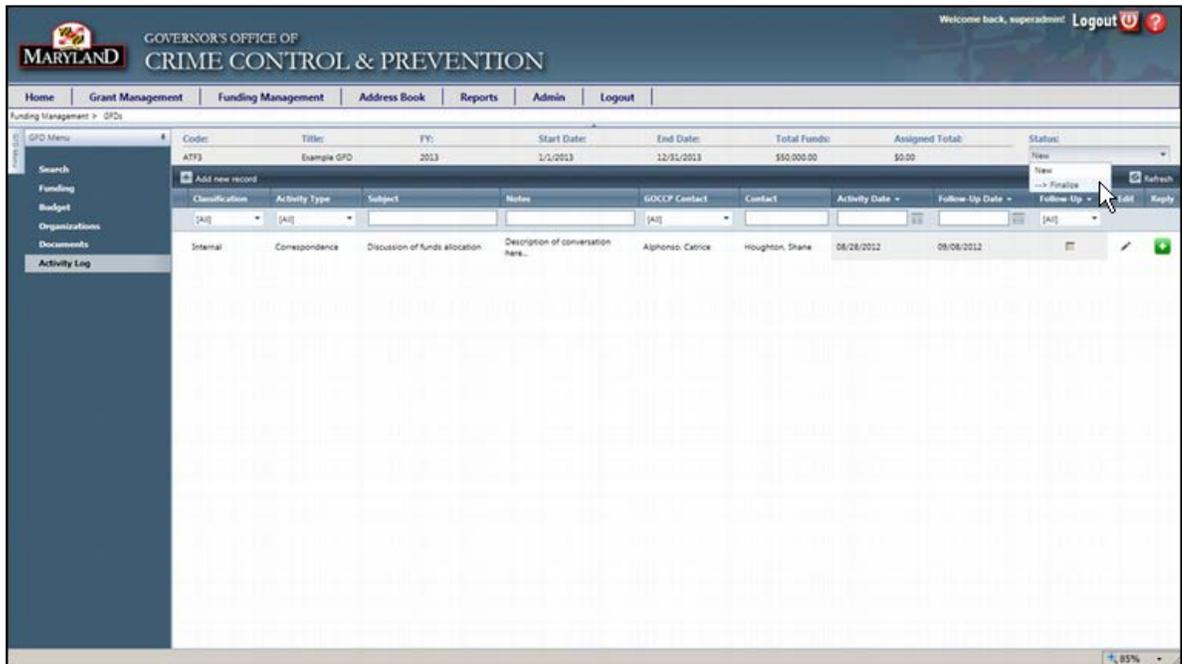


Figure 102 - Finalize a GFD

2. Click OK when the Grant Funding Distribution successfully saved Dialog Box appears.

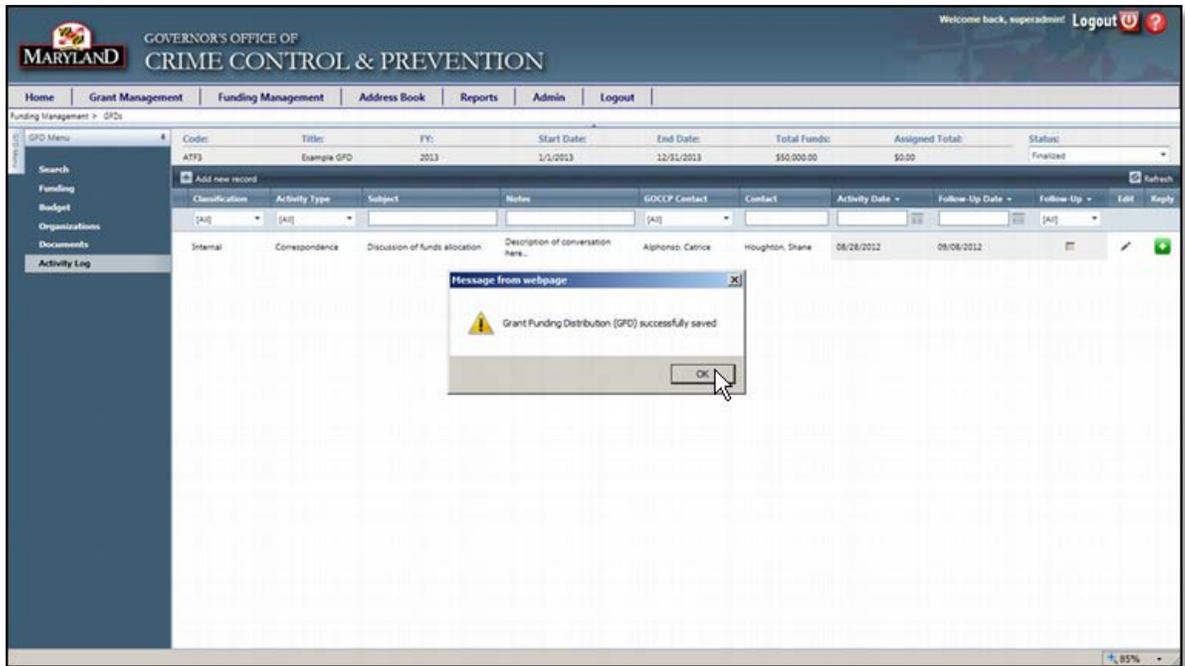


Figure 103 - GFD Finalization Confirmation

## 6.4.2 View GFDs

1. From your Home screen, select **GFDs** from the Funding Management menu.



2. The GFD home screen displays all existing GFD records. Refer to the table below for a description of the column headings for each Funding Year record.

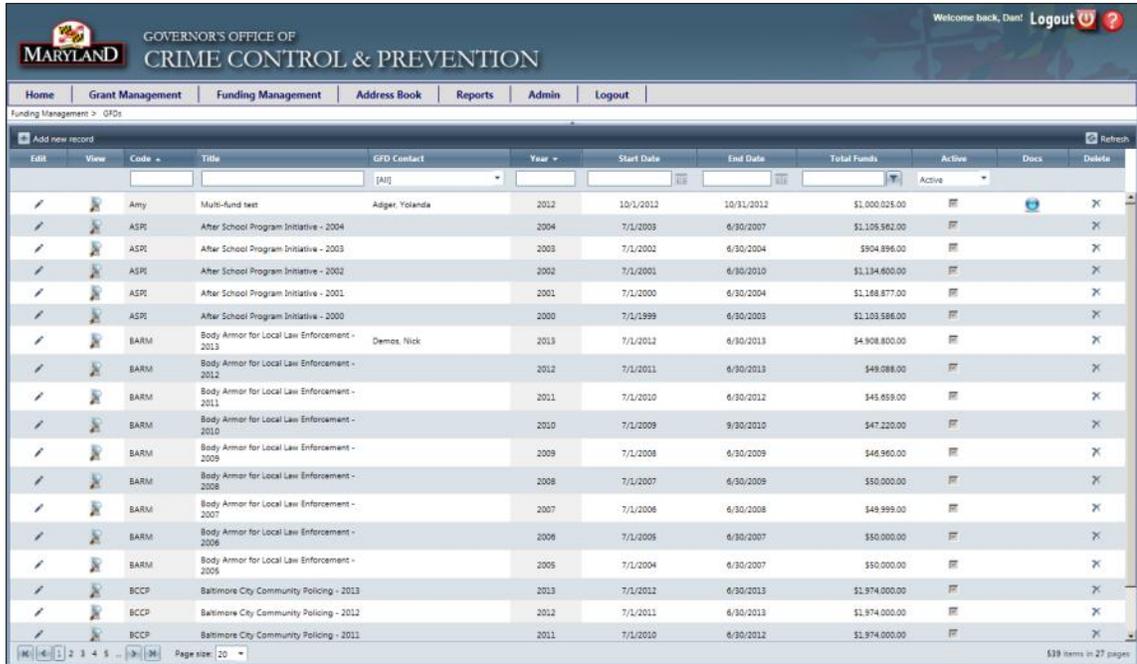


Figure 104 – GFD Home Screen

GFD TOP-LEVEL SCREEN DISPLAY FIELDS	
Edit	Click on the pencil icon in this column to edit an existing GFD record (refer to the procedure <a href="#">Edit a GFD</a> later in this section).
Code	This field displays the 4 Character NOFA code (usually the primary funding program).
Title	This field displays the <b>Funding Year</b> title that the GFD is based on.
GFD Contact	This field displays the GOCCP contact who is responsible for managing the GFD.
Year	This field displays the NOFA year (usually the same as the primary funding source's year).
Start Date	This field displays the date sub-awards would start.
End Date	This field displays the date sub-awards would end.
Total Funds	This field displays the <b>Total Available Amount</b> of funding that remains for sub-recipients to apply for grants against for the GFD.
Active	This field indicates whether this GFD record is <b>Active</b> or <b>Inactive</b> .
Docs	Click on the magnifying glass icon in this field to view the NOFA document attached to the GFD.
View	Click on the icon in this field to edit the details of the GFD and manage them via the <b>GFD Menu (Funding, Budget, Organizations, Documents, and Activity Log)</b> .
Delete	Click on the X icon in this column to delete an existing GFD record (refer to the procedure <a href="#">Delete a GFD</a> later in this section).

### 6.4.3 Edit a GFD

To edit the high-level details of a GFD record:

1. From your Home screen, select **GFDs** from the Funding Management menu.



2. The GFD screen displays all GFD records.

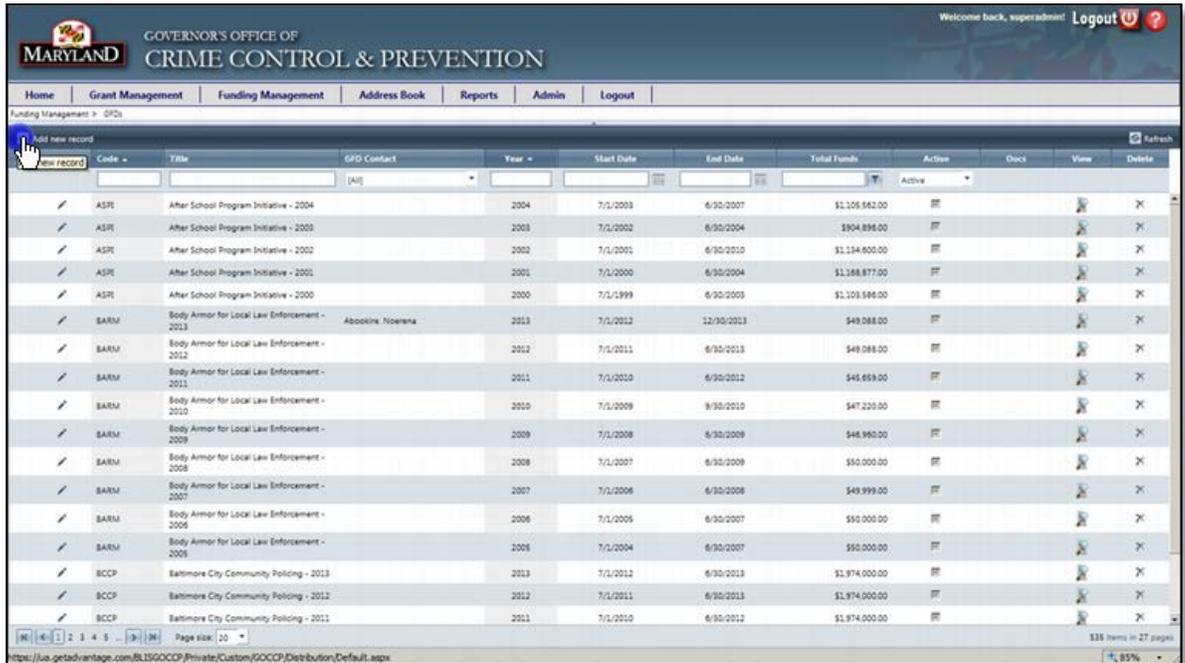


Figure 105 - GFD Home Screen

3. Click the pencil icon in the GFD record you wish to edit. The high-level GFD data entry is shown.

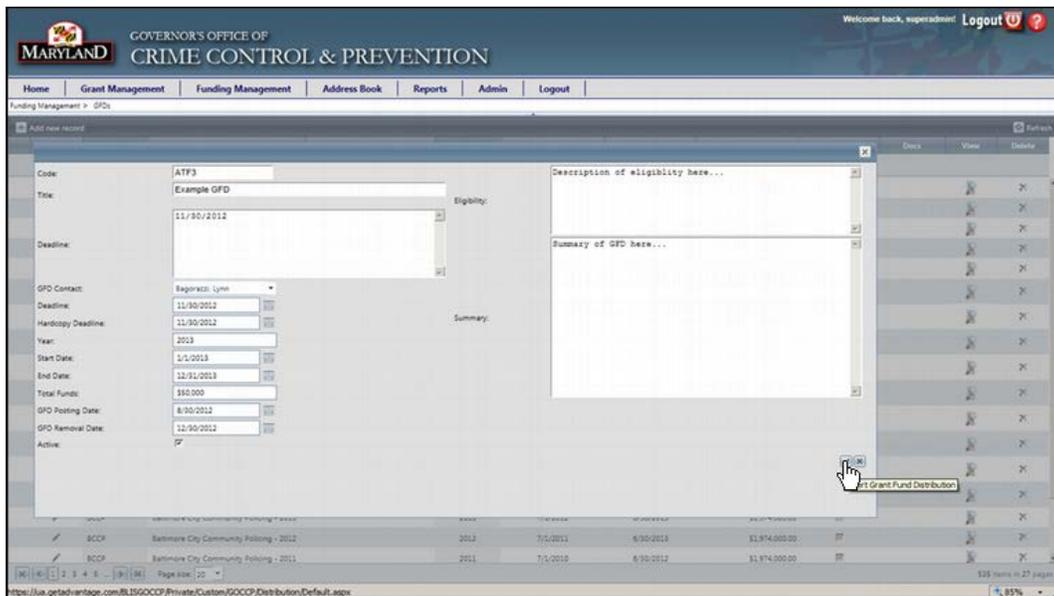
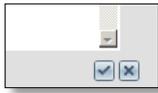


Figure 106 - Edit a GFD

4. Edit data in any of the data entry screen fields for the GFD as follows:

GFD - "ADD NEW RECORD" FIELDS	
Code	Enter the 4 Character NOFA code (usually the primary funding program).
Title	Enter the <b>Funding Year</b> title that the GFD is based on.
Deadline	Verbose description of deadlines (hardcopy and electronic dates/times). Free form text box.
GFD Contact	Select the name of the GOCCP contact who is responsible for managing the GFD from the dropdown list.
Deadline	Enter the date by which all grant applications based on this GFD must be submitted.
Hardcopy Deadline	Enter the date that GOCCP must receive hardcopies of grant applications by in order to be considered for awarding.
Year	Enter a NOFA year (usually the same as the primary funding source's year).
Start Date	Enter the date sub-awards would start.
End Date	Enter the date sub-awards would end.
Total Funds	Enter the <b>Total Amount</b> of funding that will be available for sub-recipients to apply for grants against for the GFD.
GFD Posting Date	Enter the date that the GFD will become available and be displayed in the Available Funding dashboard of the GMS home page.
GFD Removal Date	Enter the date that the GFD will be removed and no longer available.
Active	Click to place a checkmark in the box and designate the GFD as <b>Active</b> .
Eligibility	This is a free-form text box. Enter any special eligibility requirements that sub-recipients must be made aware of when applying for a grant based on the GFD.
Summary	This is a free-form text box. Enter a brief summary of the GFD that users will see when they click on the View icon for a GFD in the Available Funding dashboard.

5. Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the GFD.



Press the **X** to cancel – you will lose any information you modified for the GFD if you cancel.

#### 6.4.4 Delete a GFD

1. With proper system permission, you can delete a GFD by clicking on the X icon in the GFD row.

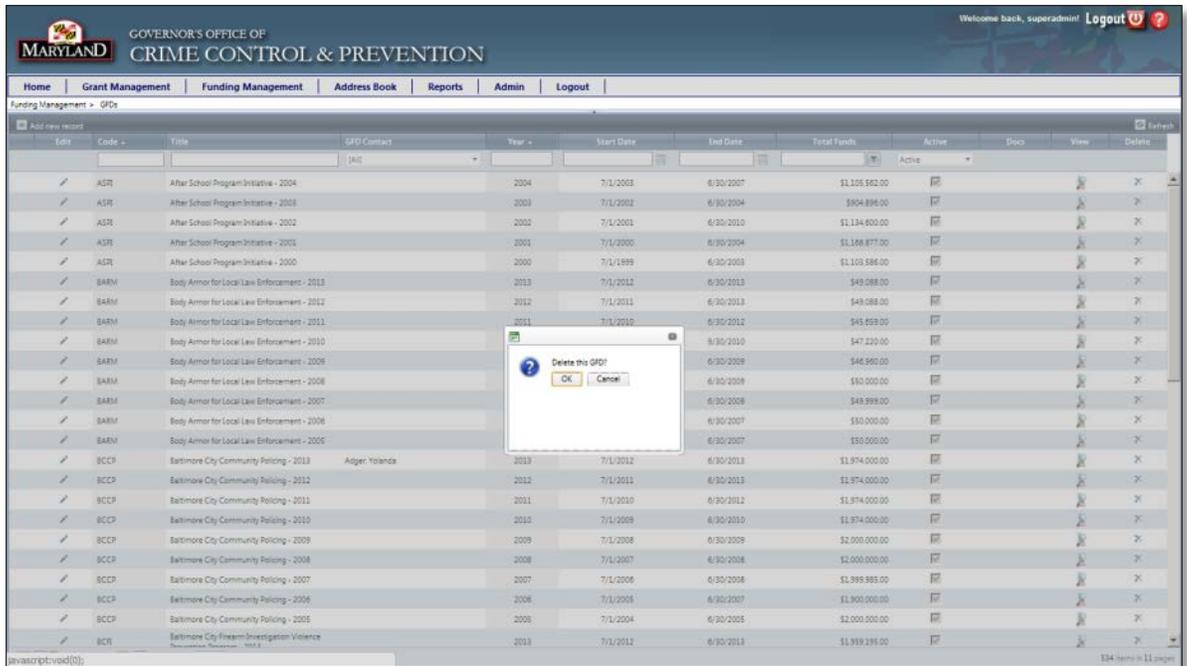


Figure 107 - Delete a GFD

2. After clicking the X, a “Delete this GFD?” confirmation message is displayed.
  - Click the OK button to delete the GFD.
  - If you click the Cancel button, the GFD is not deleted and you are returned to the GFD list.

## 7 Grant Management

### 7.1 Introduction

GMS provides full life-cycle support for the GOCCP Grant Application and Awarding Process. This section of the User Manual is presented in four parts:

- Creating Grant Applications provides detailed instruction on how to create, complete, and electronically submit a grant application, as well as how to withdraw an application. These procedures are included in the User Manual that is available to the public on the GOCCP GMS Public Home Page.
- Managing Grant Applications guides the internal GOCCP user through the process of turning a grant application into a grant award, including logging the initial receipt of a grant application, updating its status through the various reviews, and awarding the grant.
- Performing a Grant Award Review describes the process of preparing the award and making it available to the sub-recipient by assigning funds, goals, and objectives, and linking the award to any pertinent previous grants awarded to the same organization.
- Maintaining Grant Awards focuses on the procedures for managing awarded grants from the initial awarding through the life of the award to its closure, including topics like logging site visits and audits, disputes and grant adjustment notices, and report reviewing. This includes the procedure for programmatic reporting, which is also included in the User Manual available to the public.

### 7.2 Searching for a Grant Application

If an application you are searching for is not displayed in your Applications dashboard on the GMS Home Page, you can see a full listing of applications by accessing the Application Search screen from the Grant Management menu:

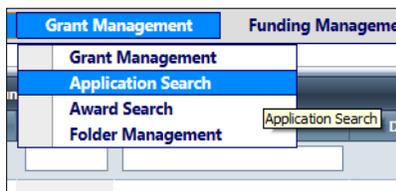


Figure 108 - Access Grant Management -> Application Search

The Application Search screen is displayed. It contains more fields than the Applications dashboard, and allows you to view applications with all statuses.

App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Project Director	Amount	County	Misc Fee	Status
1009-B-0024	MD Department of Juvenile Services	MD Department of Juvenile Services	Operation: Stop the Neighborhood Accountancy Board (HCPD)	05/01/2000	04/30/2001	Schmitt, Danae	\$40,096.00	St. Mary's	Alphonso, Carole	Awarded
1009-B-0024	MD Department of Juvenile Services	MD Department of Juvenile Services	"Project RESHARE - A Violence and Juvenile Delinquency Reduction Program"	05/01/2000	04/30/2001	Maynor, Sheila	\$48,558.00	Baltimore City	Alphonso, Carole	Application Denied
1009-B-0024	MD Department of Juvenile Services	MD Department of Juvenile Services	Frederick Heritage Community Juvenile Intervention Initiative	05/01/2000	04/30/2001	Smith, Ronald	\$2,592.00	Frederick	Alphonso, Carole	Awarded
1009-B-0027	MD Department of Juvenile Services	MD Department of Juvenile Services	Washington County Mentoring Program	05/01/2000	04/30/2001	Wesker, Robert	\$43,000.00	Washington	Alphonso, Carole	Awarded
1009-B-0028	MD Department of Juvenile Services	MD Department of Juvenile Services	Enhancement of Victim Services	07/01/2000	06/30/2001	Curtis, Terry	\$129,632.00	0 - State-wide	Alphonso, Carole	Awarded
1009-B-0029	MD Department of Juvenile Services	MD Department of Juvenile Services	Intensive Case Management Heroin-Addiction Project	05/01/2000	04/30/2001	Tucker, David	\$40,000.00	Carroll	Alphonso, Carole	Awarded
1009-B-0030	MD Department of Juvenile Services	MD Department of Juvenile Services	Commission on Juvenile Justice Jurisdiction Testimony Support	03/01/2000	02/28/2001	Mauritoy, Kayna	\$27,541.00	0 - State-wide	Alphonso, Carole	Awarded
1009-B-0031	MD Department of Juvenile Services	MD Department of Juvenile Services	Spotlight on School Drug Testing Initiative	07/01/2000	06/30/2001	Phillips, Ruth	\$1,023,727.00	0 - State-wide	Alphonso, Carole	Awarded
1009-B-0032	MD Department of Juvenile Services	MD Department of Juvenile Services	Project Response Ability - A Bi-County Job Development and Victim Restitution Program	03/01/2000	02/28/2001	Mitar, Donna	\$126,953.00	Cavert	Alphonso, Carole	Awarded
1009-B-0033	City of Baltimore	City of Baltimore	BCPS Project Pride	07/01/2000	06/30/2001	Maddon, Sally	\$75,520.00	Baltimore City	Alphonso, Carole	Awarded
1009-B-0034	Montgomery County Office of the County Executive	Montgomery County State's Attorney's Office	Gang Prosecution- Montgomery County	06/30/2000	06/29/2001	Geniet, Douglas	\$66,164.00	Montgomery	Alphonso, Carole	Awarded
1009-B-0035	Baltimore County, Maryland	Baltimore County Police Department	Juvenile Offenders in Need of Supervision (JONS)	07/01/2000	06/30/2001	Schwartz, Ronald	\$124,922.00	Baltimore County	Alphonso, Carole	Awarded
1009-MV-0005	Wisconsin County State's Attorney's Office	Wisconsin County State's Attorney's Office	District Court Victim/Witness Coordinator	07/01/2000	06/30/2001	Ruak, Denis	\$26,500.00	Wisconsin	McCam, Denise	Awarded
1009-MV-0006	Carroll County State's Attorney's Office	Carroll County State's Attorney's Office	Victim Service Case Management	07/01/2000	06/30/2001	Schaum, Joyce	\$80,929.00	Carroll	McCam, Denise	Awarded
1009-MV-0009	Anne Arundel County Victim-Witness Assistance Unit	Anne Arundel County Police Department Headquarters	Victim Assistance Education & Outreach	07/01/2000	06/30/2001	Tali, Dennis	\$23,000.00	Anne Arundel	McCam, Denise	Awarded
1009-MV-0004	City of Salisbury - Office of the Mayor	City of Salisbury - Office of the Mayor	Victim assistance Services	07/01/2000	06/30/2001	Bradley, Sandra	\$12,484.00	Wisconsin	McCam, Denise	Awarded
1009-MV-0005	Office of the State's Attorney for Baltimore City	Office of the State's Attorney for Baltimore City	City Domestic Violence Unit	07/01/2000	06/30/2001	Brown, Violette	\$48,322.00	Baltimore City	McCam, Denise	Awarded
1009-MV-0006	Washington County State's Attorney's Office	Washington County State's Attorney's Office	Juvenile Court Victim/Witness Coordinator	07/01/2000	06/30/2001	Ritter, Jill	\$98,376.00	Washington	McCam, Denise	Awarded
1009-MV-0007	Kent County Board of County Commissioners	Kent County Sheriff's Office	Kent County Sheriff's Office - Victim Witness Assistance	07/01/2000	06/30/2001	Price, John	\$20,896.00	Kent	McCam, Denise	Awarded
1009-MV-0008	Howard County, Maryland	Howard County State's Attorney's Office	District Court Victim Advocate	07/01/2000	06/30/2001	Wes, Michael	\$45,519.00	Howard	McCam, Denise	Awarded
1009-MV-0008	Charles County Government	Charles County Government	Charles County Sheriff's Office Victims Services Liaison	07/01/2000	06/30/2001	Wyant, Michael	\$45,778.00	Charles	McCam, Denise	Awarded
1009-MV-0010	Howard County Government, Finance Dept.	Howard County Government, Finance Dept.	Domestic Violence Victims Advocate Program	07/01/2000	06/30/2001	Timmons, Andrew	\$45,980.00	Howard	McCam, Denise	Awarded
1009-MV-0011	Anne Arundel County, Maryland	Anne Arundel County State's Attorney's Office	Victim Identification Specialist	07/01/2000	06/30/2001	Grimer, Lauren	\$30,875.00	Anne Arundel	McCam, Denise	Awarded

Figure 109 - GMS Grant Application Search Screen

Please refer to the section *Sorting, Filtering, and Searching for Records* for help with finding a grant application.

## 7.3 Creating Grant Applications

### 7.3.1 Apply for a Grant

The following procedure describes in detail how to apply for a grant based on funding opportunities/NOFAs made available through the GOCCP. The major steps include:

1. Locate Funding Source for your Project
2. Create new Grant Application Record
3. Complete Project Face Sheet
4. Assign Officers
5. Add Service Sites
6. Add Project Summary
7. Add Project Narrative
8. Create Project Budget
9. Attach Documents to Grant Application
10. Electronically Submit Grant Application to GOCCP
11. Print Grant Application for Hardcopy Submission

As with any type of application, this is an iterative process where at times the application is returned by the grant manager to the applicant for clarification or more detail. You can use the processes described in this section when you are revising or updating an application and re-submitting it for approval.

#### 7.3.1.1 Locate Funding Source for your Project

1. Locate the NOFA you want to use to fund your new project in the Available Funding Dashboard.

- To narrow the list down to Active NOFAs, click on the drop-down list in the Available Funding Dashboard and select **Active**. The resulting list displays only active NOFAs.

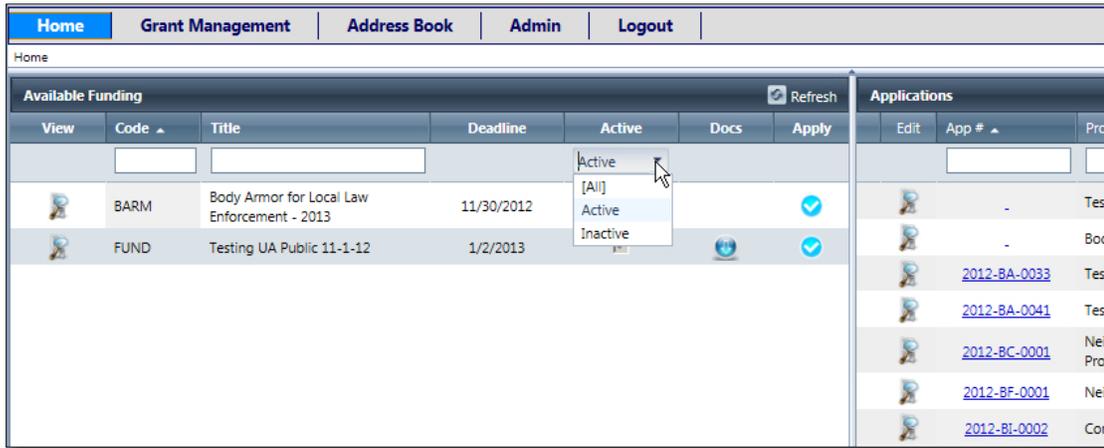


Figure 110 – View only Active NOFAs

- If the NOFA list is very long, search by Code or Title. If you know the NOFA Code, type it into the Code field and press Enter. The resulting list displays only the NOFA that matches the Code you entered.
- If you don't know the Code, type any keywords that might be in the NOFA title into the Title field and press Enter. The resulting list displays only NOFAs that contain your keywords in their title.

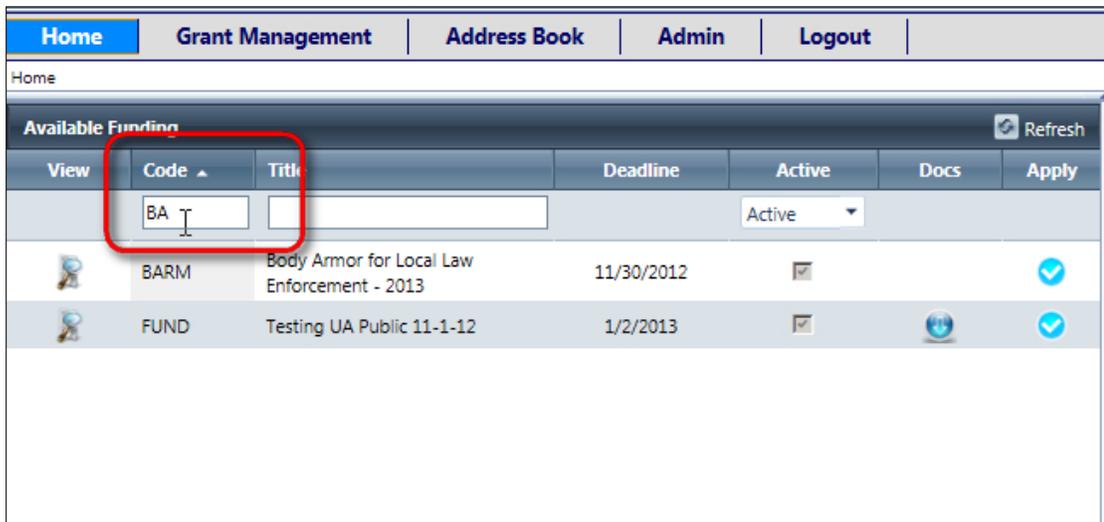


Figure 111 - Search for NOFAs by Code or Title

- Click on the View button to display overview information for a NOFA. Click on the X to close the pop-up Display window.

Home						
Grant Management		Address Book		Admin	Logout	
Home						
Available Funding <span style="float: right;">Refresh</span>						
View	Code	Title	Deadline	Active	Docs	Apply
	BA			Active		
	ARM	Body Armor for Local Law Enforcement - 2013	11/30/2012	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
	FUND	Testing UA Public 11-1-12	1/2/2013	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

Figure 112 - View NOFA Overview Information

Home						
Grant Management		Address Book		Admin	Logout	
Home						
Available Funding <span style="float: right;">Refresh</span>						
Body Armor for Local Law Enforcement - 2013						
Summary:						
Start Date: 7/1/2012						
End Date: 6/30/2013						
Online Application Deadline: 11/30/2012						
Hardcopy Application Deadline: 11/30/2012						
Funding Year: 2013						
Eligibility Description: Testing in UA Public						
Deadline Description:						

Figure 113 - NOFA Information Pop-Up Window

- If you would like to review/print the hardcopy NOFA for this record, click on the icon in the Docs column of the record. The hardcopy NOFA contains program specific requirements needed to complete a grant application. The application cannot be accurately completed without following the instructions provided in the hardcopy NOFA. A standard browser dialog box will appear, prompting you to either view or save the document to your hard disk.

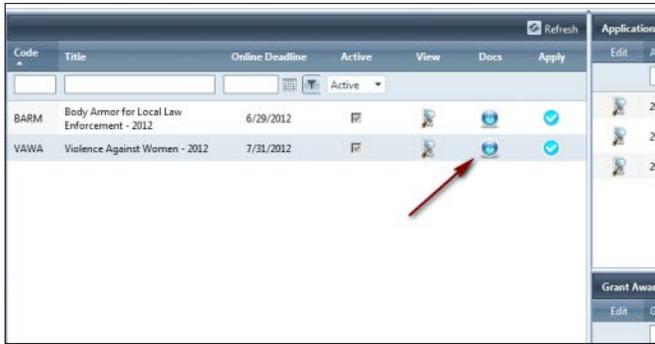


Figure 114 - View the harcopy NOFA

### 7.3.1.2 Create new Grant Application Record

1. Once you have located the appropriate NOFA in the Available Funding Dashboard, click the Apply button associated with it to begin the application process.



Figure 115 – Click Apply on NOFA to Begin Application Process

- The Initial Grant Application Screen (Face Sheet) is displayed.

Figure 116 - Initial Grant Application Screen (Face Sheet)

### 7.3.1.3 Complete Project Face Sheet

NOTE: After entering the required information in this screen, you must click the Save button in order to enter additional Grant Application information.

- Enter a brief (one line only), descriptive title of the program you are proposing for funding into the Project Title box. See *hardcopy NOFA guidelines for proper naming of a project*.

Figure 117 - Enter Project Title

- Your Applicant Agency is assigned to you based on your User ID and cannot be changed.

**PROJECT TITLE**  
Project Title: Domestic Violence Awareness and Prevention

**APPLICANT AGENCY**  
 Is service site?  
 Organization: Baltimore County, Maryland  
 Address: Baltimore County, Maryland  
 Office of the County Executive  
 400 Washington Avenue  
 City, State Zip: Towson, MD 21204  
 Org. Type: Local Government  
 County: Baltimore County  
 Auth. Official: Kevin Kamenetz  
 DUNS Number: [ ]  
 SAM Expiration Date: [ ]

**IMPLEMENTING AGENCY**  
 Baltimore County Police Department  
 Is service site?  
 Organization: Baltimore County Police Department

**PROJECT DATES**  
 GFD Code: LETS  
 GFD Title: Law  
 GFD Start Date: 4/2/  
 GFD End Date: 4/2/  
 Proposed Start Date: 4/2/  
 Proposed End Date: 4/2/

**PREPARER INFORMATION**  
 Preparer's Name: [ ]  
 Preparer's Phone: [ ]

Figure 118 - View Applicant Agency Information

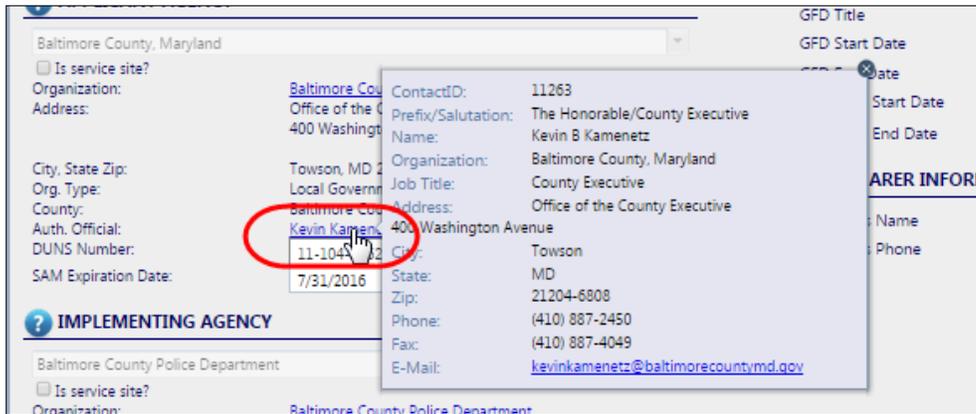
- If your Applicant Agency is a Service Site (services are provided at the applicant agency's physical location), click on the **Is Service Site** checkbox to place a checkmark in it. Additional service sites may be entered later in the application process.

**APPLICANT AGENCY**  
 Baltimore County, Maryland  
 Is service site?  
 Organization: Baltimore County, Maryland  
 Address: Baltimore County, Maryland  
 Office of the County Executive  
 400 Washington Avenue  
 City, State Zip: Towson, MD 21204  
 Org. Type: Local Government  
 County: Baltimore County  
 Auth. Official: Kevin Kamenetz  
 DUNS Number: 11-104-0662  
 SAM Expiration Date: 7/31/2016

Figure 119 - Designate Applicant Agency as a Service Site

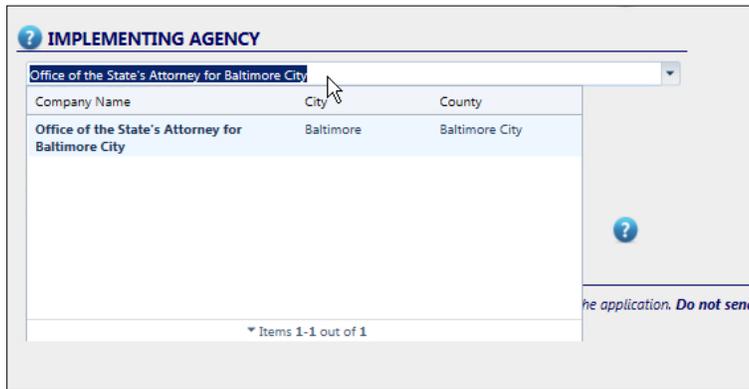
- Enter the **DUNS Number**, which is a unique nine-digit identification number representing the physical location of your organization
- Enter the **SAM Expiration Date** – your organization's System for Award Management registration.

Click on the authorized official of the Applicant Agency to view contact information for that person.



- The Implementing Agency for the new grant defaults to the Applicant Agency location. If the Implementing Agency is different from, or a sub-agency of the Applicant Agency, select it from the drop-down list as follows:

1. Select the text currently in the Implementing Agency box.



2. Press the Delete key to clear the field.



3. When the field is cleared, the drop-down list will be populated with valid agencies. Click on an agency to select it as the Implementing Agency.
  - As with your Applicant Agency, if you're Implementing Agency is a Service Site (services are provided at the implementing agency's physical location), click on the **Is Service Site** checkbox to place a checkmark in it. Additional service sites may be entered later in the application process.
  - As with your Applicant Agency, to display Contact Information for the authorized official of the Implementing Agency, click on the **Question Mark** button next to their name.

Expiration Date: 7/31/2016

**IMPLEMENTING AGENCY**

Baltimore County Police Department

Is service site?

Organization: [Baltimore County Police Department](#)

Address: 700 East Joppa Road

City, State Zip: Towson, MD 21286

Org. Type: Local Government

County: Baltimore County

Auth. Official: [James Johnson](#)

**AUDIT REQUIREMENTS**

Figure 120 - Designate Implementing Agency as a Service Site

- Click on the authorized official of the Implementing Agency to view contact information for that person.

**IMPLEMENTING AGENCY**

Baltimore County Police Department

Is service site?

Organization: [Baltimore County Police Department](#)

Address: 700 East Joppa Road

City, State Zip: Towson, MD 21286

Org. Type: Local Government

County: Baltimore County

Auth. Official: [James Johnson](#)

**AUDIT REQUIREMENTS**

*Applicants must submit copies of any Audit Findings and a corrective action plan is required.*

**Contact Information Pop-Up Window:**

ContactID: 427

Prefix/Salutation: Chief/Chief

Name: James W Johnson

Organization: Baltimore County Police Department

Job Title: Chief of Police

Address: 700 East Joppa Road

City: Towson

State: MD

Zip: 21286-5505

Phone: (410) 887-2214

Fax: (410) 821-8887

E-Mail: [jwjohnson@baltimorecountymd.gov](mailto:jwjohnson@baltimorecountymd.gov)

Figure 121 - Display the Contact Information Pop-Up Window

- To close the Contact Information pop-up window, click on the **X** in the upper-right corner of the window.

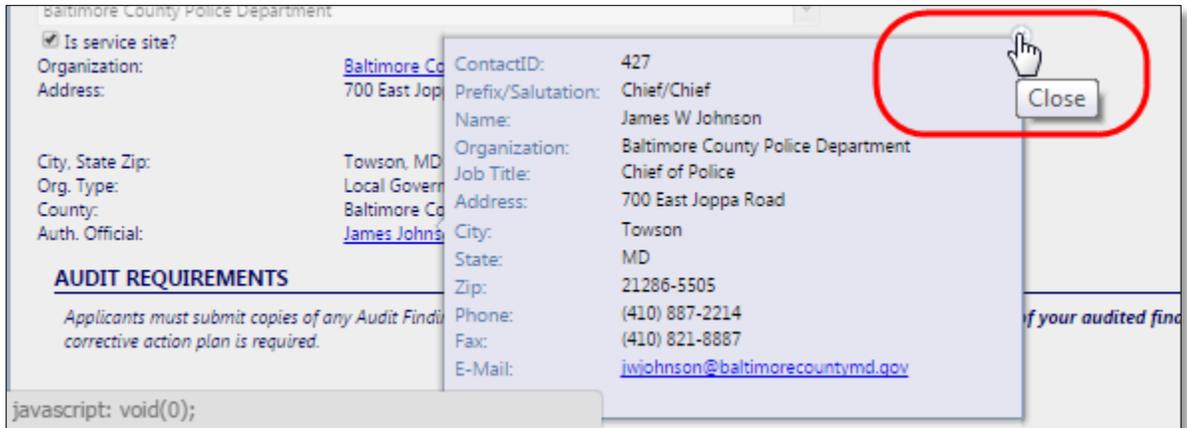


Figure 122 – Close the Contact Information Pop-Up Window

- Enter the Proposed Start and End Dates for your project by clicking on the calendar icon next to each date field. The default displayed start and end dates are taken directly from the dates provided in the NOFA. These dates are required to proceed with the application process, and may be modified using the following guidelines:
  - Proposed Start Date must be *greater than or equal to* NOFA start date
  - Proposed End Date must be *less than or equal to* NOFA end date

Before you submit your application, you may change these dates at will. Once your grant has been awarded, you must go through the Grant Modification process as detailed in section 7.8.7.

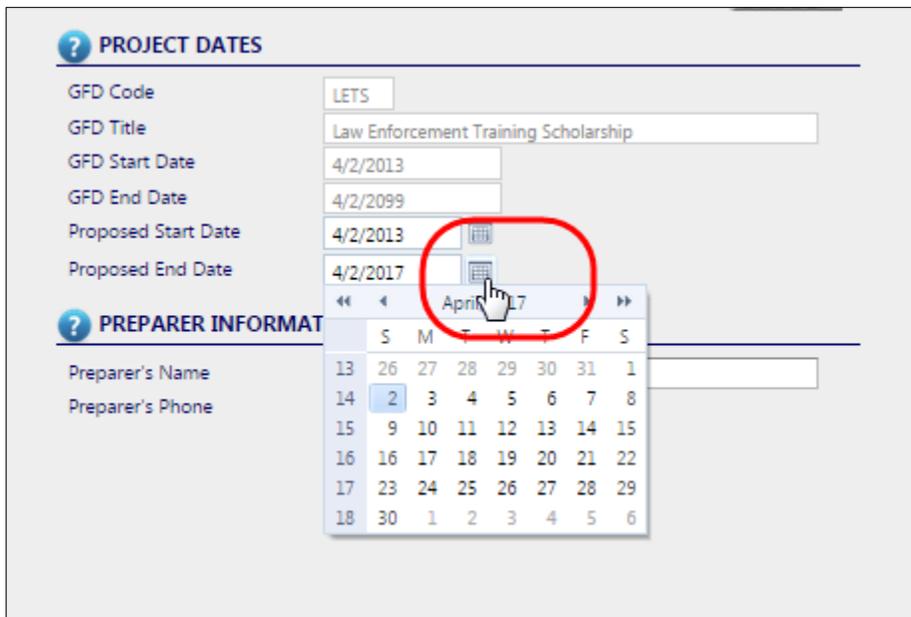


Figure 123 - Enter Proposed Start and End Dates

- Click in the Preparer's Name field and enter your name (or the name of the primary Preparer if it is someone else in your organization). Click in the Preparer's Phone field and enter the

corresponding phone number. Note: Type only the digits of the phone number into the field; the field is set up to automatically format the number with parenthesis, spaces, and a dash.

Proposed Start Date 4/2/2013  
Proposed End Date 4/2/2017

**? PREPARER INFORMATION**

Preparer's Name John Smith  
Preparer's Phone (717) 555-1212

Figure 124 - Enter Preparer's Contact Information

- Click on the **Save** button to save the application as a draft, then click **OK** on the confirmation pop-up window when it is displayed to access the Detailed Grant Application Screen.

Welcome back, adavis@baltimorecountymd.gov Logout

**F**  
**TROL & PREVENTION**

Admin Logout

Save

**? PROJECT DATES**

GFD Code LETS  
GFD Title Law Enforcement Training Scholarship  
GFD Start Date 4/2/2013  
GFD End Date 4/2/2099  
Proposed Start Date 4/2/2013  
Proposed End Date 4/2/2017

**? PREPARER INFORMATION**

Preparer's Name John Smith  
Preparer's Phone (717) 555-1212

Figure 125 - Save the Application

- When the application draft is successfully saved, you are taken to the Detailed Grant Application Screen.

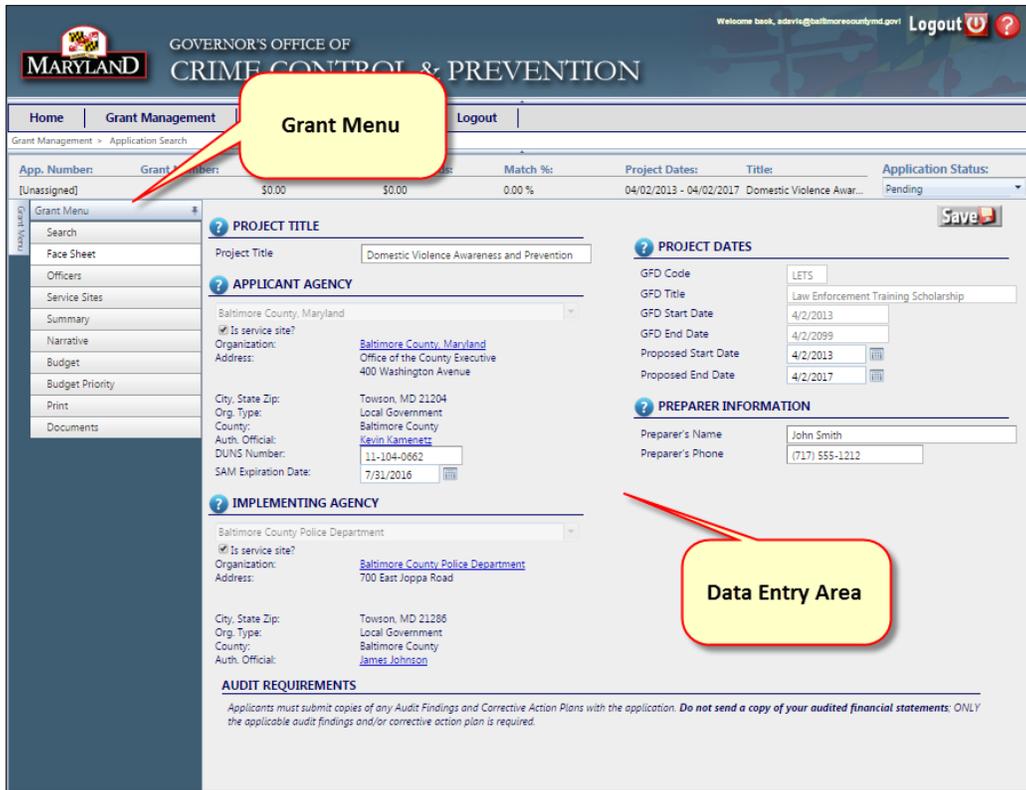


Figure 126 - Detailed Grant Application Screen

The Detailed Grant Application screen is divided into two areas – the Grant Menu sidebar and the Data Entry Area.

- The Grant Menu sidebar displays a list of sections required to complete a grant application.
- The Data Entry Area displays all of the required fields for each section in the Grant Menu list.

**Note:** To successfully complete and submit a grant application, you must provide all of the required information in each Grant Menu category as described in the remaining steps of this process.

The Grant Application Screen displays the Face Sheet first by default. The Face Sheet is the screen where you began the application process. If you need to update any face sheet information (i.e., Project Title, Dates, or Application / Implementing Agency information), you can do that here.

Welcome back, sdavis@baltimorecountymd.gov! [Logout](#)  

**MARYLAND** GOVERNOR'S OFFICE OF  
**CRIME CONTROL & PREVENTION**

Home | **Grant Management** | Address Book | Admin | Logout

Grant Management > Application Search

App. Number:	Grant Number:	Req. Funds:	Match Funds:	Match %:	Project Dates:	Titles:	Application Status:
[Unassigned]		\$0.00	\$0.00	0.00 %	04/02/2013 - 04/02/2017	Domestic Violence Awar...	Pending

Grant Menu

- Search
- Face Sheet
- Officers
- Service Sites
- Summary
- Narrative
- Budget
- Budget Priority
- Print
- Documents

**PROJECT TITLE**

Project Title:

**APPLICANT AGENCY**

Baltimore County, Maryland

Is service site?

Organization: [Baltimore County, Maryland](#)  
Office of the County Executive  
400 Washington Avenue

Address:

City, State Zip: Towson, MD 21204  
Org. Type: Local Government  
County: Baltimore County  
Auth. Official: [Kevin Kamenetz](#)  
DUNS Number:   
SAM Expiration Date:

**PROJECT DATES**

GFD Code:

GFD Title:

GFD Start Date:

GFD End Date:

Proposed Start Date:

Proposed End Date:

**PREPARER INFORMATION**

Preparer's Name:

Preparer's Phone:

**IMPLEMENTING AGENCY**

Baltimore County Police Department

Is service site?

Organization: [Baltimore County Police Department](#)  
700 East Joppa Road

Address:

City, State Zip: Towson, MD 21286  
Org. Type: Local Government  
County: Baltimore County  
Auth. Official: [James Johnson](#)

**AUDIT REQUIREMENTS**

*Applicants must submit copies of any Audit Findings and Corrective Action Plans with the application. Do not send a copy of your audited financial statements; ONLY the applicable audit findings and/or corrective action plan is required.*

**Save** 

Figure 127 - Grant Menu Face Sheet Screen

Note: Make sure you click the **Save** button to save any changes you make here before moving to the next item in the Grant Menu. If you don't, you will lose any changes you've made.

### 7.3.1.4 Assign Officers

1. Click **Officers** in the Grant Menu to designate the officers for your project.

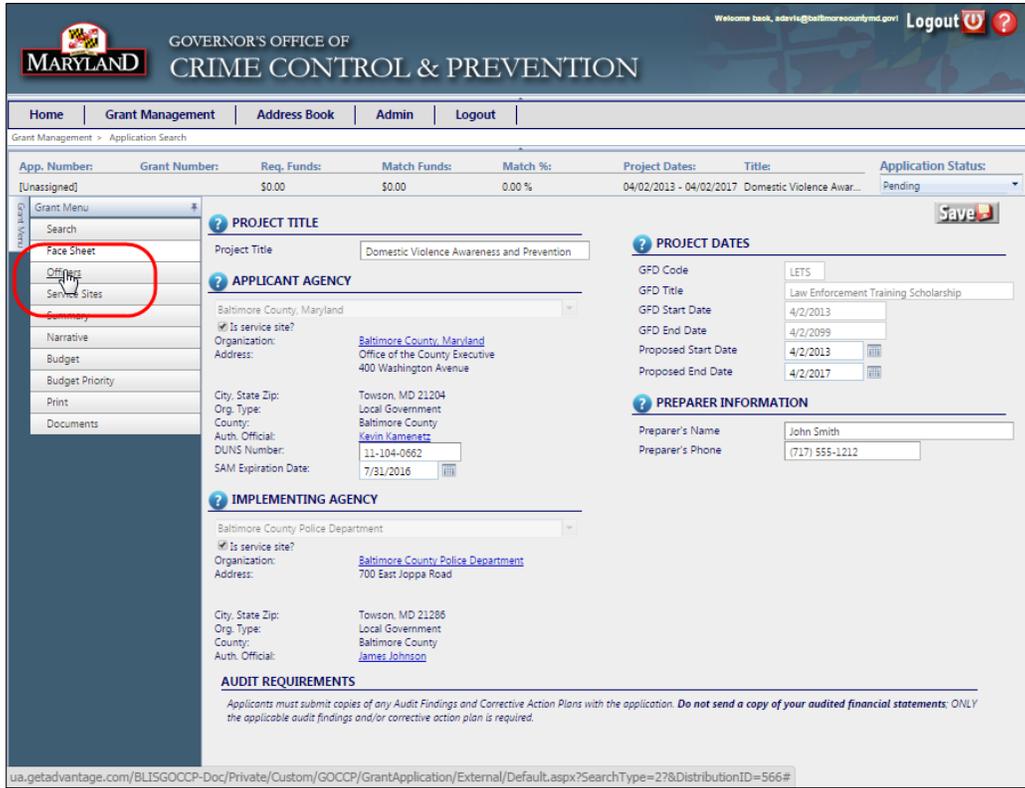


Figure 128 - Click Officers in Grant Menu

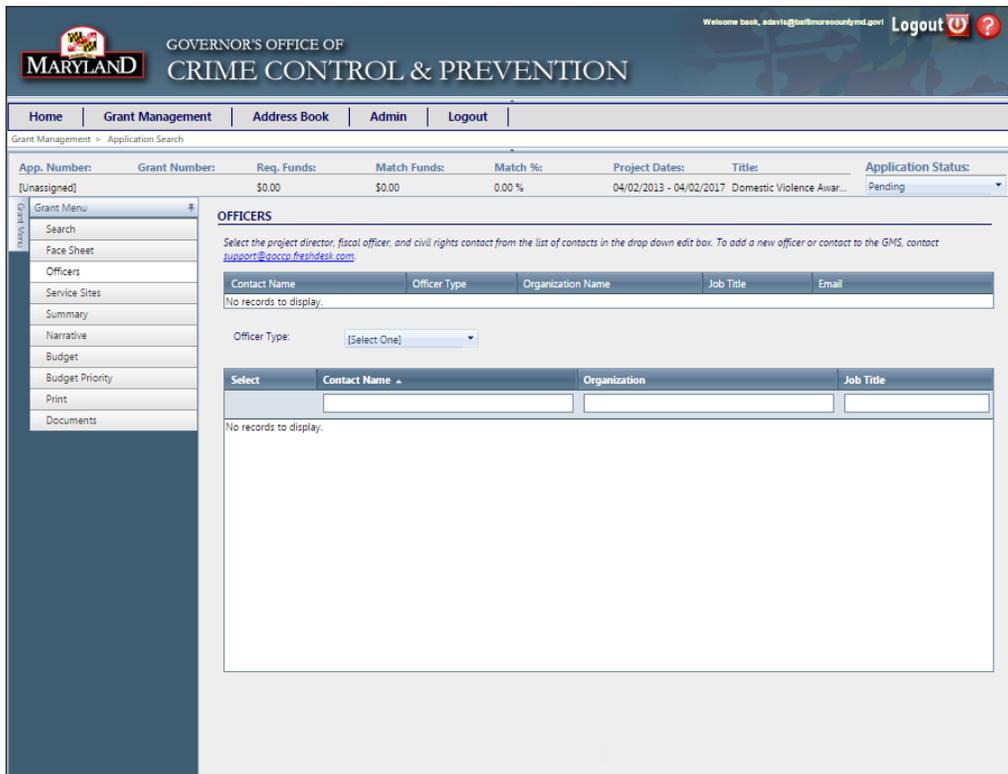


Figure 129 - Grant Menu Officers Screen

- A Project Director, Fiscal Officer, and Civil Rights Contact are required by GOCCP for every grant application.

2. Select **Project Director** from "Officer Type" drop-down list.

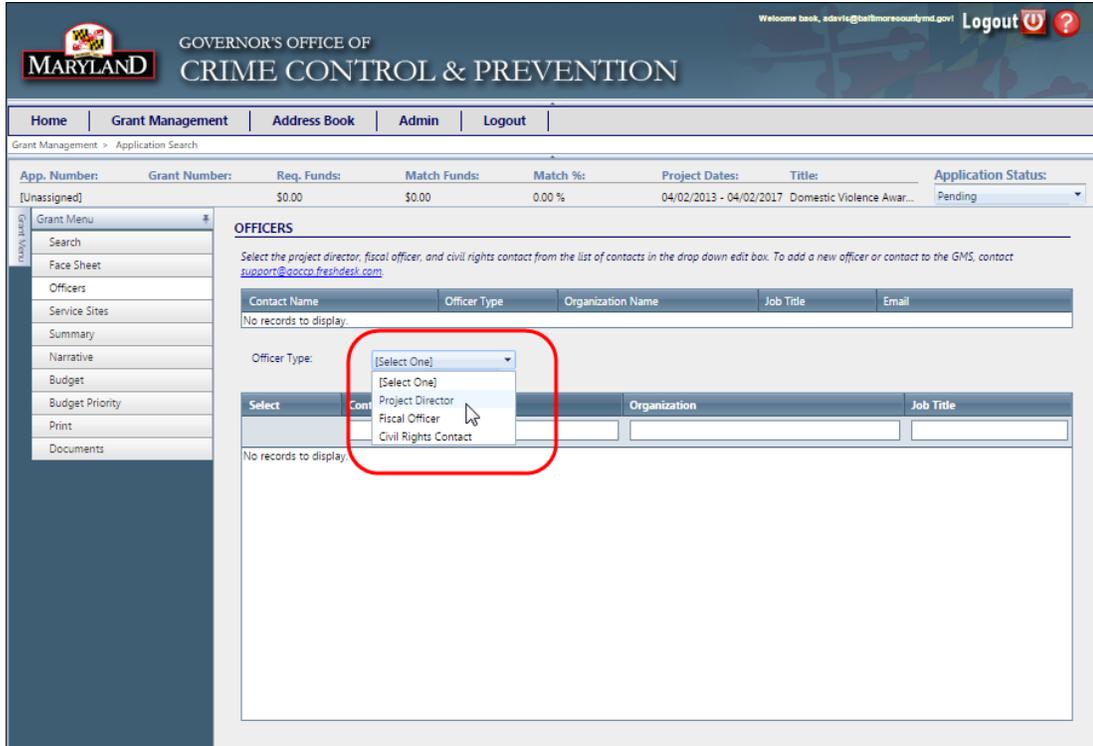


Figure 130 - Select Project Director from Officer Type Drop-down List

3. Navigate through the list of names to find and select your Project Director.

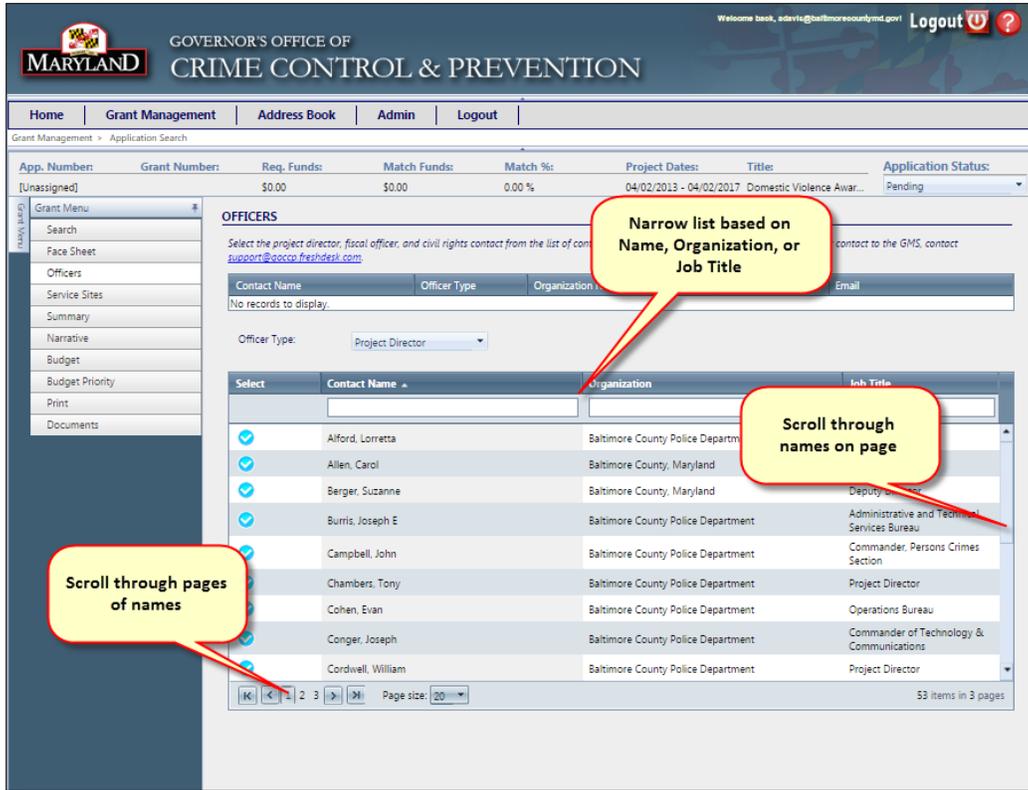


Figure 131 - Find a Contact to Designate as an Officer

You can scroll through the contact names on the current page by dragging the slider up and down, and you can scroll through the pages of names by clicking the next and previous buttons or select a specific page in the page number drop-down list.

You can also narrow the list by typing information in the Contact Name, Organization, or Job Title fields.

- It is not necessary to enter any of this information in full – the search will locate any contacts that contain any of the information you typed in.
- For example, if you know your Project Director’s Job Title has the word “clerk” in it, like Account Clerk, type the word clerk into the Job Title field and press Enter. The search will return any contacts with clerk in their Job Title, as shown below.

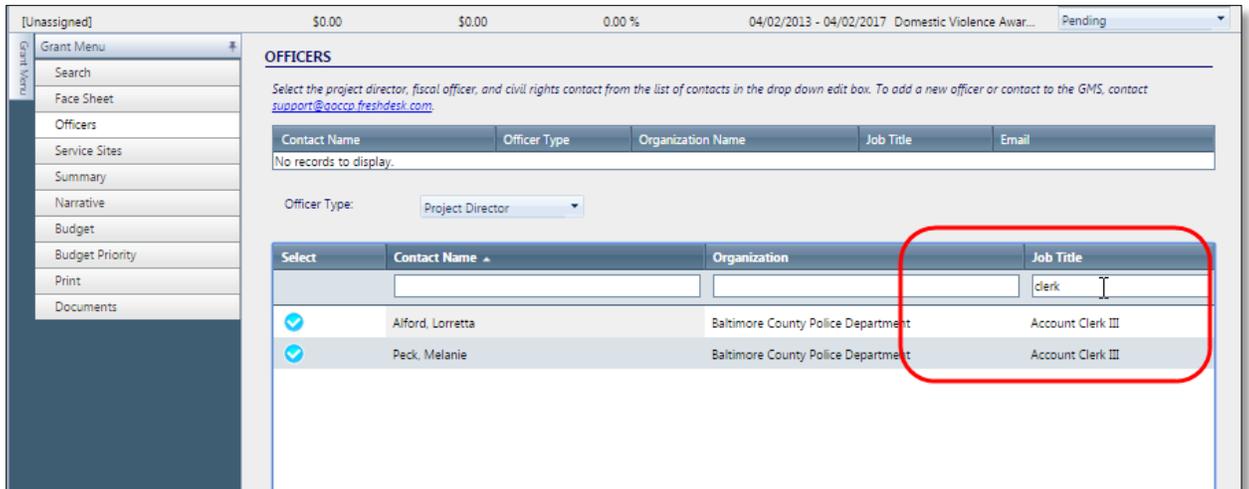


Figure 132 - Search Contacts using Keywords

4. Click the **Check Box** next to Contact Name to add that contact as the Project Director.

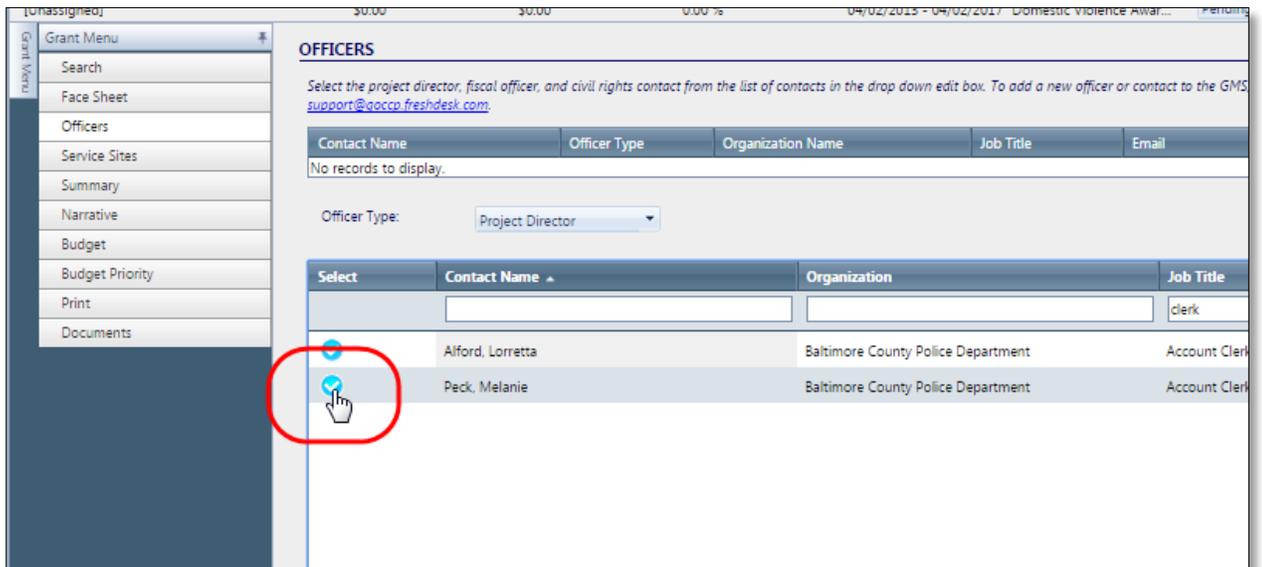


Figure 133 - Click Check Box to Select Contact

When the contact is selected, the Officers field is updated to display the selection. In this example, the contact was added as the Project Director.

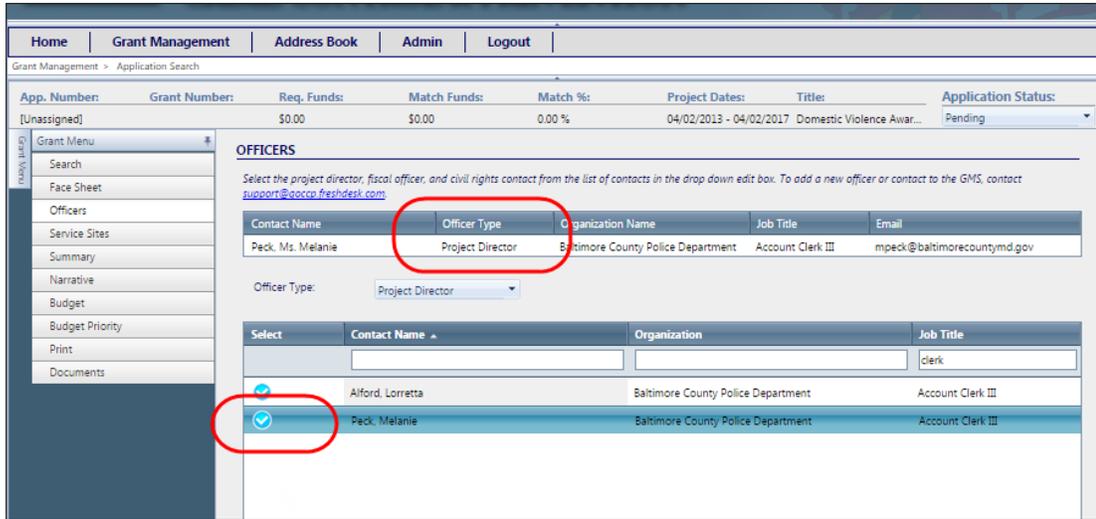


Figure 134 - Officer Added to Project

**Note:** the contact is added to the Officers list as soon as it is selected, so there is no **Save** button on this screen.

If you select the wrong contact by accident, repeat the search starting with selecting **Project Director** from the **Officer Type** drop-down list and clicking **Select** once you've found the correct contact. The Project Director line in the Officers field is updated to the new selection.

- Repeat steps 2-4 to assign the **Fiscal Officer** and **Civil Rights Contact** for your project.

Before you submit your application, you may change these contacts at will. Once your grant has been awarded, you must go through the Grant Modification process as detailed in section 7.8.7.

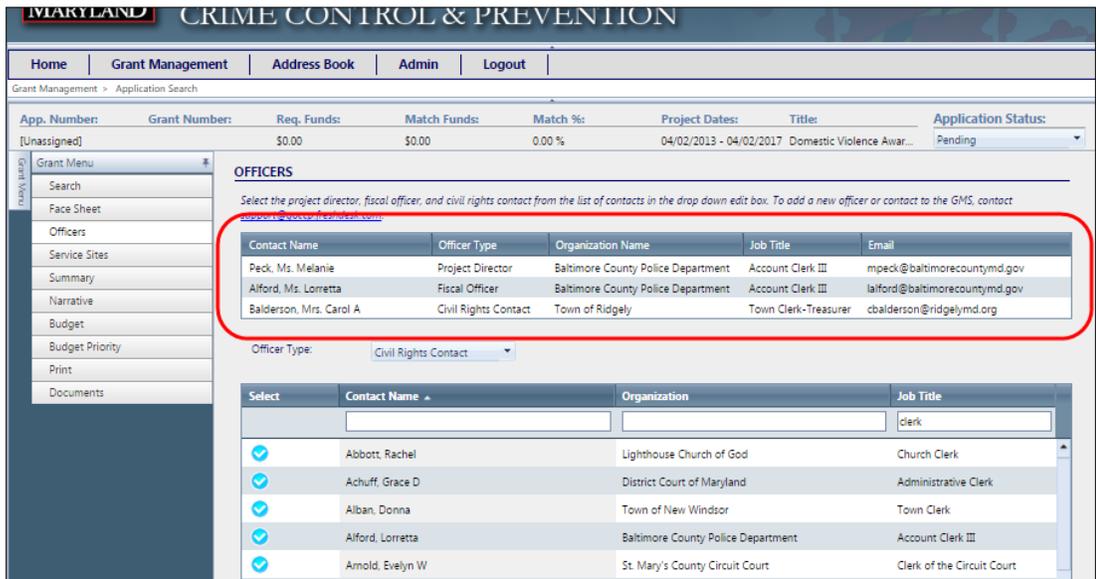


Figure 135 - Project Director, Fiscal Officer, and Civil Rights Contact Added to Application

### 7.3.1.5 Add Service Sites

1. Click **Service Sites** in the Grant Menu to view and add service sites to your project.

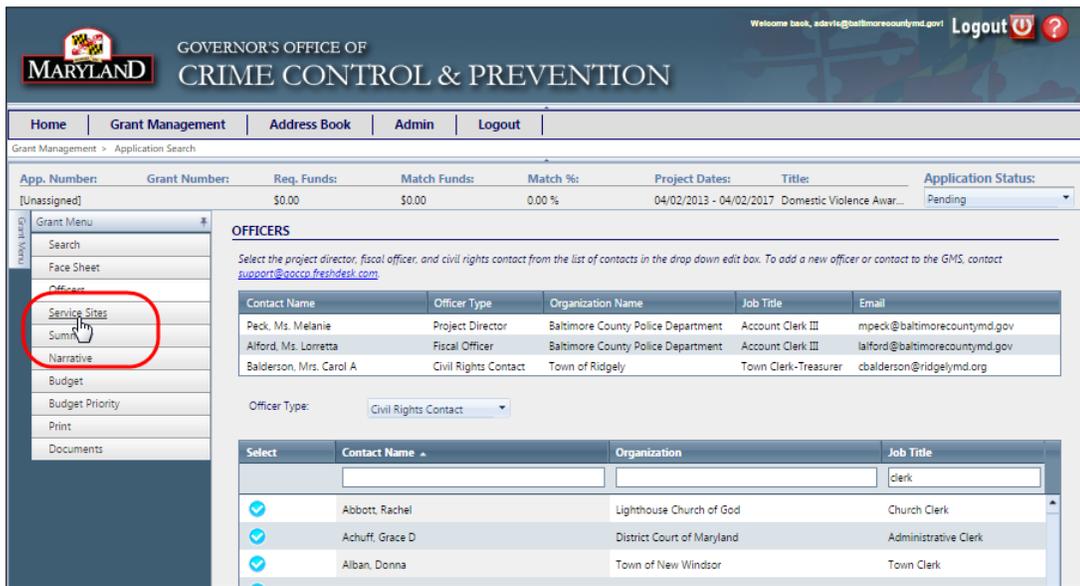


Figure 136 – Click Service Sites in Grant Menu

- Note: Any Service Sites indicated on the Face Sheet will automatically be displayed on this screen.

2. Click **Add new record** to add a service site to your project.

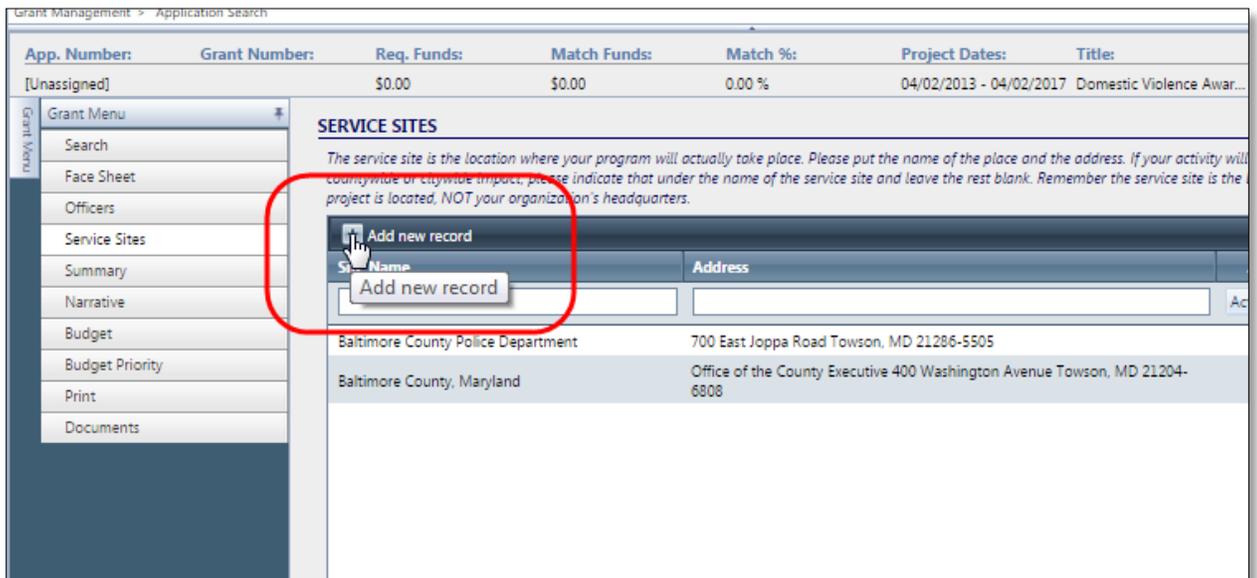


Figure 137 - Add a New Service Site Record

3. Enter the site name and address then click the **Checkmark** to save or the **X** to cancel.

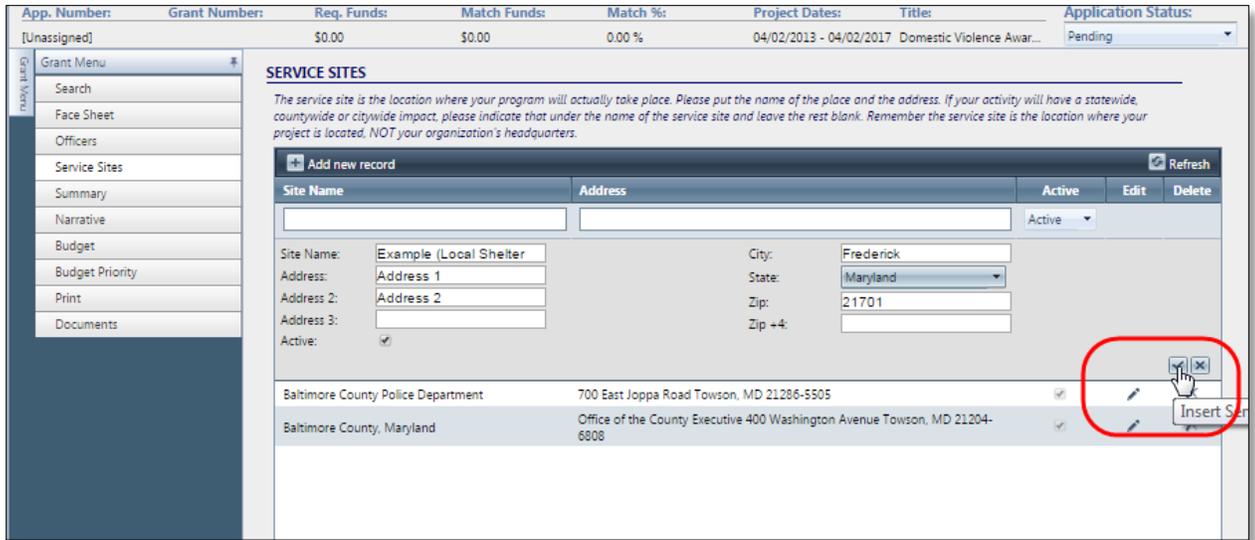


Figure 138 - Click Checkmark to Save New Service Site Record

### 7.3.1.6 Add Project Summary

1. Click on **Summary** in the Grant Menu to add a brief project summary. Instructions for writing the Project Summary appear in the hardcopy NOFA.

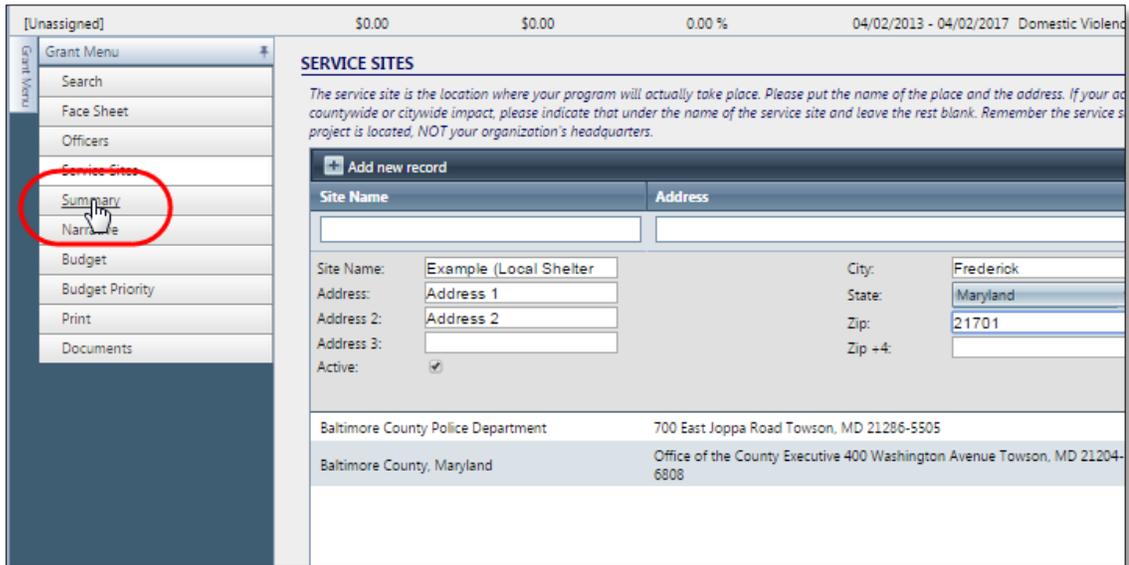


Figure 139 - Click Summary in Grant Menu

Based on the parameters outlined in the hardcopy NOFA, enter a summary of your project in the Summary box and click the Save button.

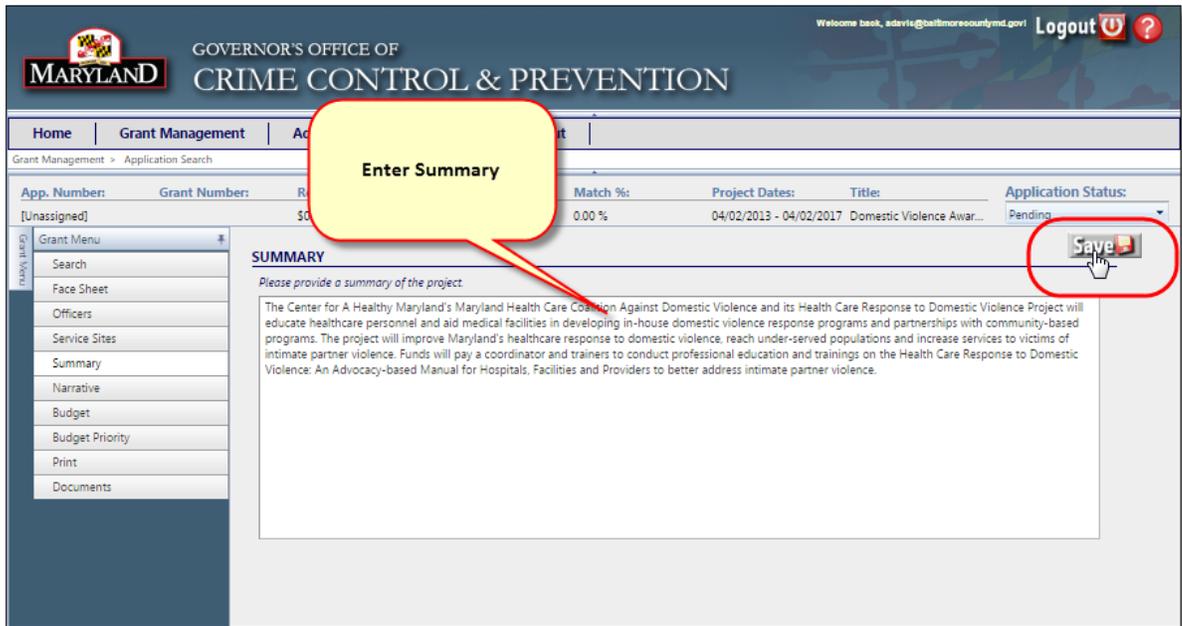


Figure 140 - Add Project Summary

### 7.3.1.7 Add Project Narrative

1. Click **Narrative** in the Grant Menu to enter a detailed description of your project. Detailed instructions for completing the Narrative appear in the hardcopy NOFA.

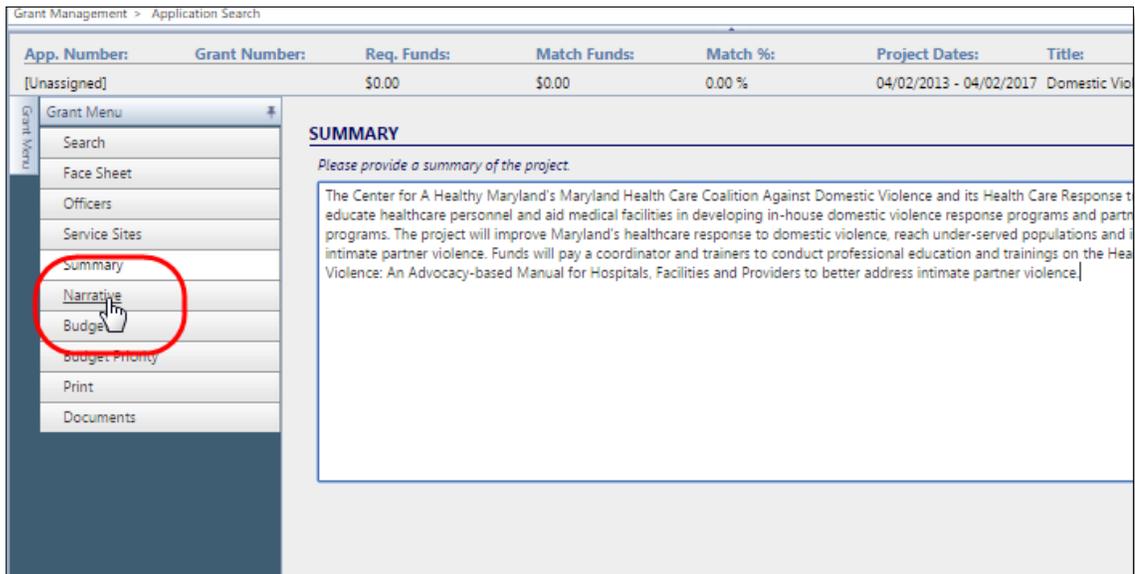


Figure 141 - Click Narrative in Grant Menu

2. Click in the text box below the Editing Toolbar to begin typing in the detailed narrative for your project. Click the **Save** button when you are finished.

- The format content requirements for the Project Narrative are explained in the Notice of Funding Availability (NOFA) for this grant. Failure to provide a properly prepared narrative (as dictated by the NOFA) could delay the processing of your application. Completing this section of the application is mandatory.
- Text for the narrative is stored as *rich text*, or formatted text, which means that you can paste narrative into the application from a word-processing program. If you type your narrative text directly into this application, you can still format it like you would in a word processor, using bullet and numbered lists, indentation, and bold/italic characters, all accessible from the Editing Toolbar.

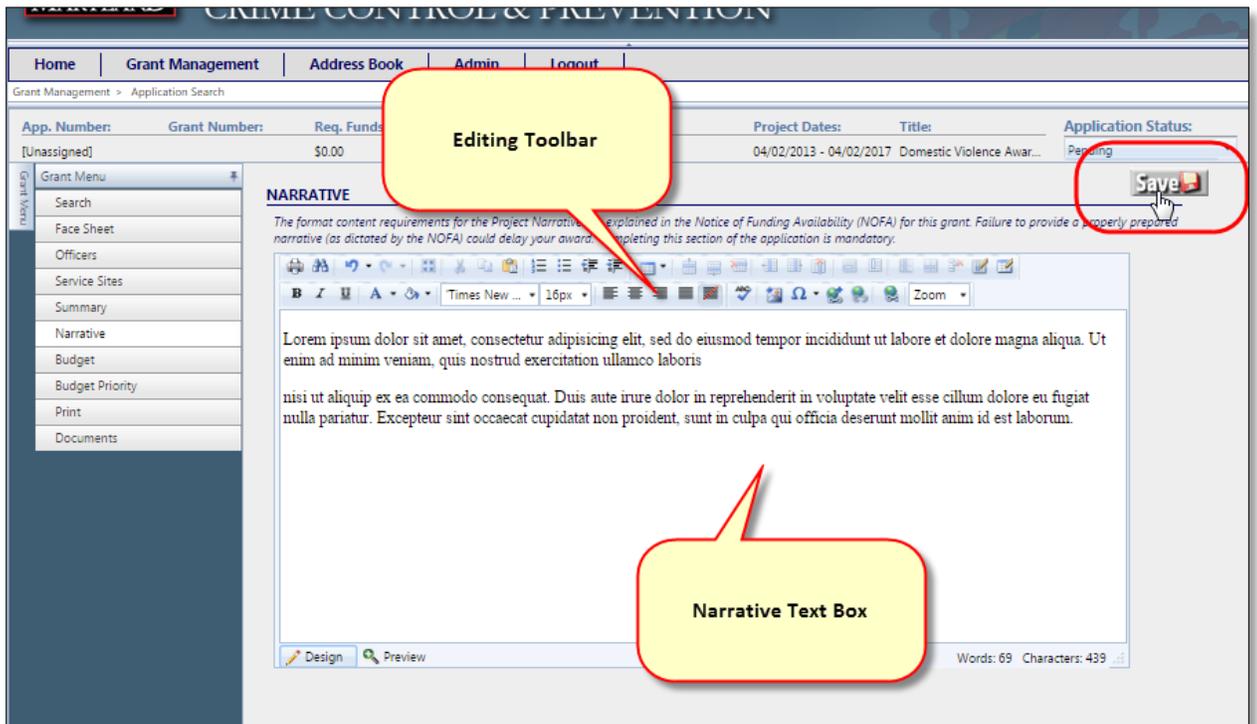


Figure 142 - Add Narrative to your application

### 7.3.1.8 Create Project Budget

A project budget must be included with every grant application. You must enter budget information into at least one of the following categories:

- Personnel
- Operating Expenses
- Travel
- Contractual Services
- Equipment
- Other

Note: Not all categories may be available (based on the parameter established in the NOFA).

The following procedure shows an example of creating a project budget containing a line item in the Personnel budget category and providing the related budget justification. Repeat this procedure for each category and line item associated with your proposed budget.

1. Click **Budget** in the Grant Menu.

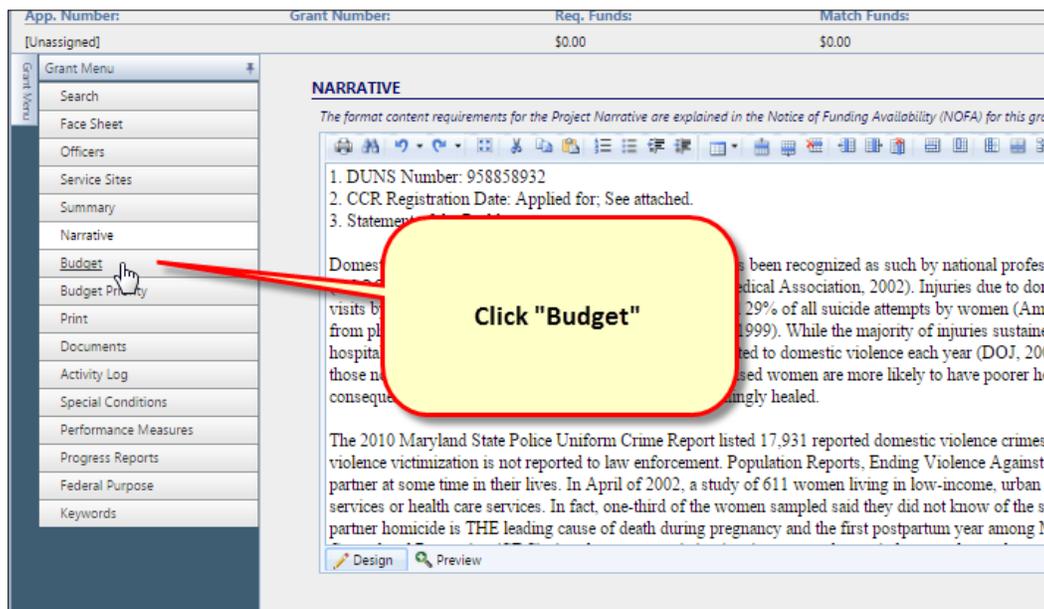


Figure 143 - Click Budget in the Grant Menu

- The Original Grant Application Budget screen is displayed:

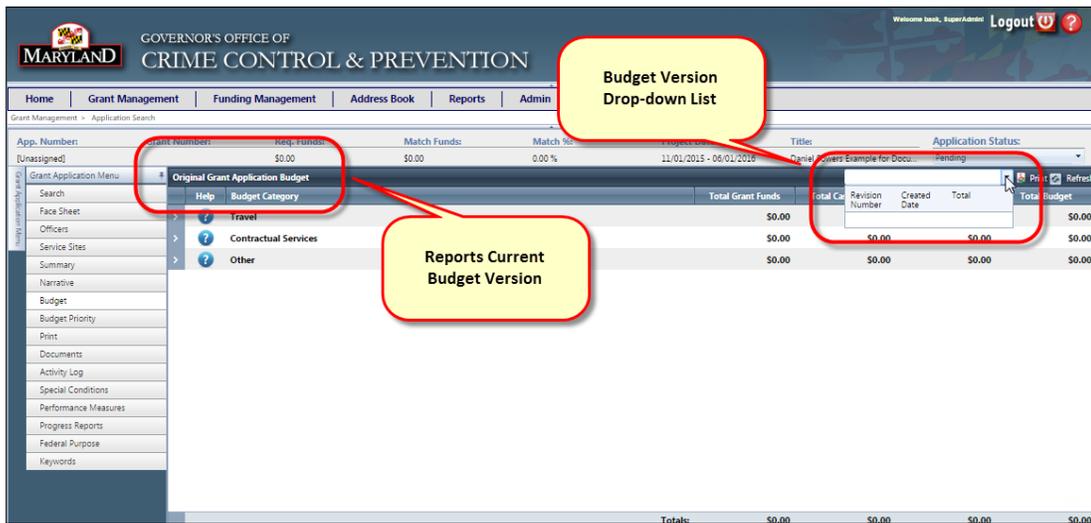


Figure 144 - Original Grant Application Budget Screen

Note two special areas of the Application Budget Screen: The current budget revision number is reported in the upper-left area of the screen. When entering a budget for the first time, this will read "Original Grant Application Budget". The second special area is the budget version drop-down list. If you've revised your original budget any number of times, you can select which version you want to view using this drop-down list. The budget version drop-down list is described in detail in section **7.3.3 - Add a Budget Revision**.

- To begin entering your original project budget, click the **Expand** icon next to the Budget Category you want to add a new entry for. For this example procedure, click the **Expand** icon next to the **Personnel** Budget Category. Then click the **+** icon beside **Add New Record**.



Figure 145 - Expand Budget Category and Add New Record

- Add the required information to the new Personnel record as described below.



Figure 146 - Add Line Item Information

- **Description:** Briefly describe the person’s role (for example: New Admin Assistant)
- **Salary Type:** Indicate whether the line item is considered Salary, Fringe, or Overtime
- **Wage Type:** Indicate whether the line item is Salary or Hourly
- **Funding:** Select the means by which the position will be funded – Grant Funds, Cash Match, or In-Kind Match.

**The following provisions apply to match requirements:**

- ⇒ The sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or
- ⇒ IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food)
- ⇒ Funds from other Federal sources may not be used to meet the match requirement.
- ⇒ Funds or in-kind resources used as match must be directly related to the project goals and objectives.
- ⇒ Sub-recipients must maintain records which clearly show the source, the amount, and the timing of all matching contributions.
- ⇒ Sources of match are restricted to the same requirements as funds allocated under the federal program and must be documented in the same manner as federal program funds, including financial and programmatic reports.

- **Annual Salary:** Enter the annual salary for the position. If it is an hourly position, you must annualize it to calculate the annual salary and enter it here.
- **Requested Amount:** Enter the amount of funds you are requesting for this resource.

5. Click the **Checkmark** below **Edit** to add the new line item to the Personnel budget category. If you click the **X** button instead, the information you entered for this line item will be lost and you will be returned to the [Original Grant Application Budget](#) screen.



Figure 147 - Save new budget line item

6. After your new line item is saved, you are returned to the [Original Grant Application Budget](#) window:



### 7.3.1.9 Create Project Budget Justifications

In the previous section, we created a budget revision and added a line item within the Personnel budget category. To provide a justification for that item, do the following:

1. Click the **Expand** icon next to Personnel.

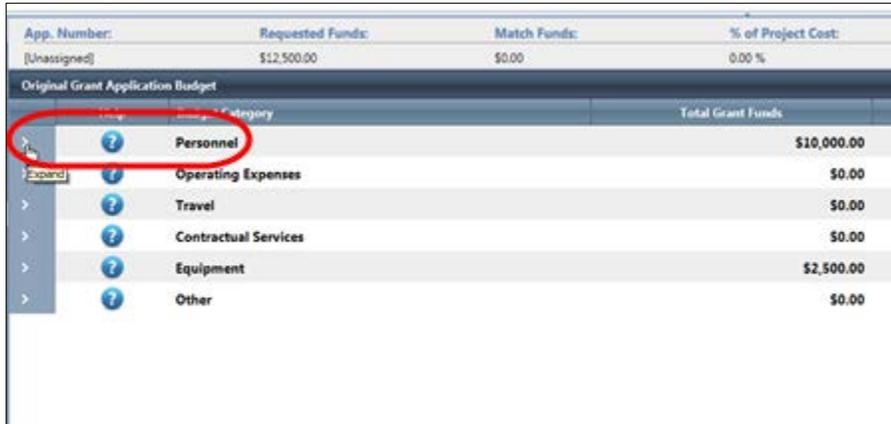


Figure 150 - Add Budget Line Item Justification - Expand Record

Records within the category are expanded automatically, and the line item you added is shown.

2. Click on the **Just** link next to the pencil icon to display the text box that you'll use to add your budget item justification.

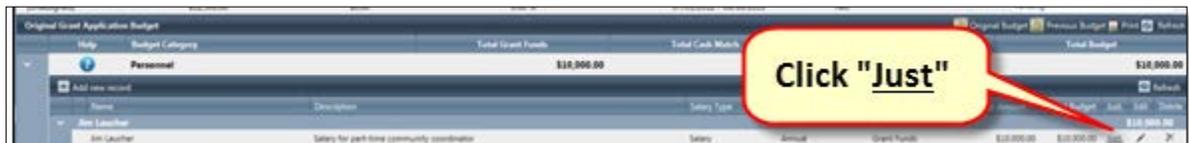


Figure 151 - Click JUST to Enter Line Item Justification

3. Click in the **Justification text box** and type in the justification for the specific budget item you just added, then click the **Save** button.

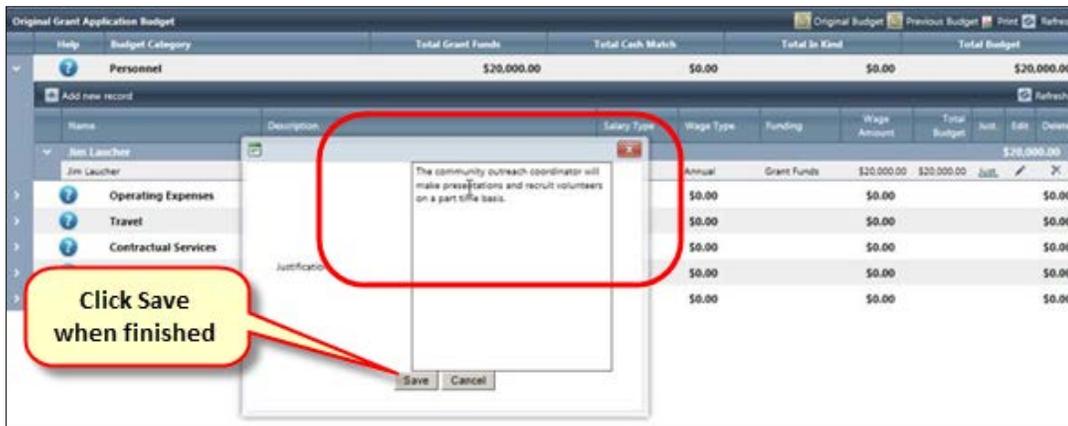


Figure 152 - Type in justification and hit Save

- Repeat this procedure to add a justification to every budget line item you created in your new budget revision.
- After creating a new budget revision, adding all required line items, and providing a justification for each line item, proceed to the next steps to complete and finalize the application.

### Budget Priority

Description of Position	Salary Type	Funding	Wage Type	Wage Amount	Total Budget	Just.	Priority	Edit	Delete
<b>Physician</b>									<b>\$15,685.00</b>
Physician	Salary	Grant Funds	Annual	\$14,570.00	\$14,570.00	<a href="#">[View/Edit]</a>	3		
Physician	Fringe	Grant Funds	Annual	\$1,115.00	\$1,115.00	<a href="#">[View/Edit]</a>	4		
<b>Project Coordinator</b>									<b>\$76,866.00</b>
Project Coordinator	Salary	Grant Funds	Annual	\$66,206.00	\$66,206.00	<a href="#">[View/Edit]</a>	1		
Project Coordinator	Fringe	Grant Funds	Annual	\$10,660.00	\$10,660.00	<a href="#">[View/Edit]</a>	2		
<b>Substance Abuse Counselor</b>									<b>\$65,635.00</b>
Substance Abuse Counselor	Salary	Grant Funds	Annual	\$51,420.00	\$51,240.00	<a href="#">[View/Edit]</a>	5		
Substance Abuse Counselor	Fringe	Grant Funds	Annual	\$14,395.00	\$14,395.00	<a href="#">[View/Edit]</a>	6		

Figure 153 – Line Items will be prioritized as you enter them

While creating your budget, you will notice there is a section that shows a Priority Number. The system will automatically generate a number for each record that you enter into the system.

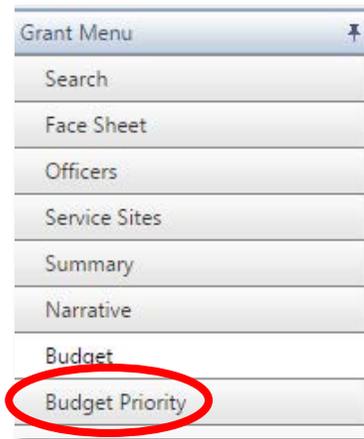


Figure 154 – Select Budget Priority from the Grant Menu

- Once the budget has been completed, under the Grants Menu, you can select “Budget Priority” and prioritize your line items from your budget.

**BUDGET PRIORITY**

Below is a list of budget line items that have been entered for this project. Sort them, by dragging and dropping, so that the most essential items are at the top of the list.

Priority	Description	Salary Type	Funding	Total Budget
1	Project Coordinator	Salary	Grant Funds	\$66,206.00
2	Project Coordinator	Fringe	Grant Funds	\$10,660.00
3	Physician	Salary	Grant Funds	\$14,570.00
4	Physician	Salary	Grant Funds	\$14,570.00
5	Substance Abuse Counselor	Salary	Grant Funds	\$51,240.00
6	Substance Abuse Counselor	Fringe	Grant Funds	\$14,385.00
7	Computer for Project Coordinator		Grant Funds	\$1,300.00
8	Medication (Vivrol)		Grant Funds	\$19,410.00
9	Local travel between ORCC & Adult Addictions		Grant Funds	\$333.00
10	Urine Drug Testing		Grant Funds	\$1,323.00

Figure 155 – Select Budget Priority from the Grant Menu

- From this section, you will be able to move the line items around from the most important to the least important. To do this, you will simply click on the line item and drag it to the proper location.

### 7.3.1.10 Finalize Grant Application

To summarize, the grant application process up to this point included the following tasks:

- Create Application
- Complete Project Face Sheet
- Assign Officers
- Add Additional Service Sites (if applicable)
- Add Project Summary
- Add Project Narrative
- Create Project Budget and Justifications
- Sort and Prioritize your Budget Line Items

Finalizing a grant application includes tasks you perform using GMS and those you will perform manually, as follows:

- Attach Documents to the Application (Optional)
- Review and Revise Application Prior to submitting it electronically in GMS
  - Generate a Draft (Pending Submission) Hardcopy
  - Review Draft Hardcopy
  - Revise Application in GMS if changes are required
  - Repeat a) through c) if necessary
- Submit Application Electronically using GMS
- Prepare and Deliver Hardcopy of Application
  - Print Hardcopy of Application using GMS
  - Collect Proper Signatures
  - Make Appropriate Number of Photocopies (as required by the NOFA)
  - Deliver Application Hardcopy to GOCCP

The tasks above that you perform in GMS are described in the following sections.

#### 7.3.1.10.1 Attach Documents to Grant Application

- Click **Documents** in the Grant Application Menu to the left of the screen.

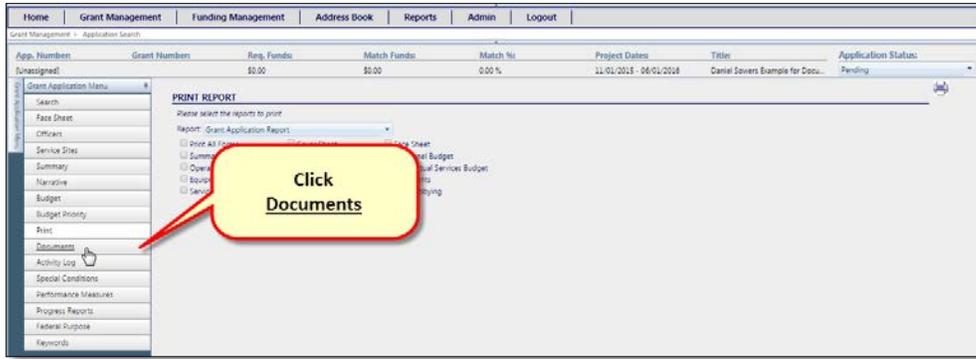


Figure 156 - Access Documents in Grant Application Menu

2. Click the **Add New Record** icon to display the data entry screen.

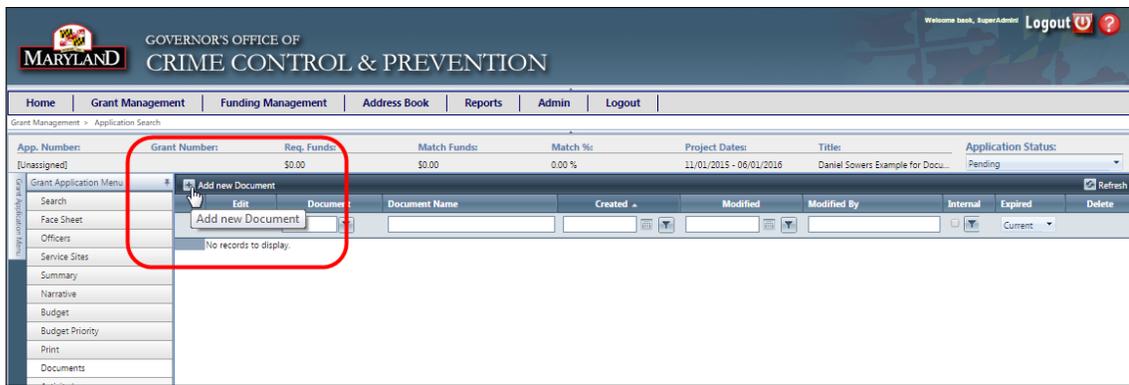


Figure 157 – Add New Document Record to Grant Application

Clicking Add New Record brings up the new document data entry screen:

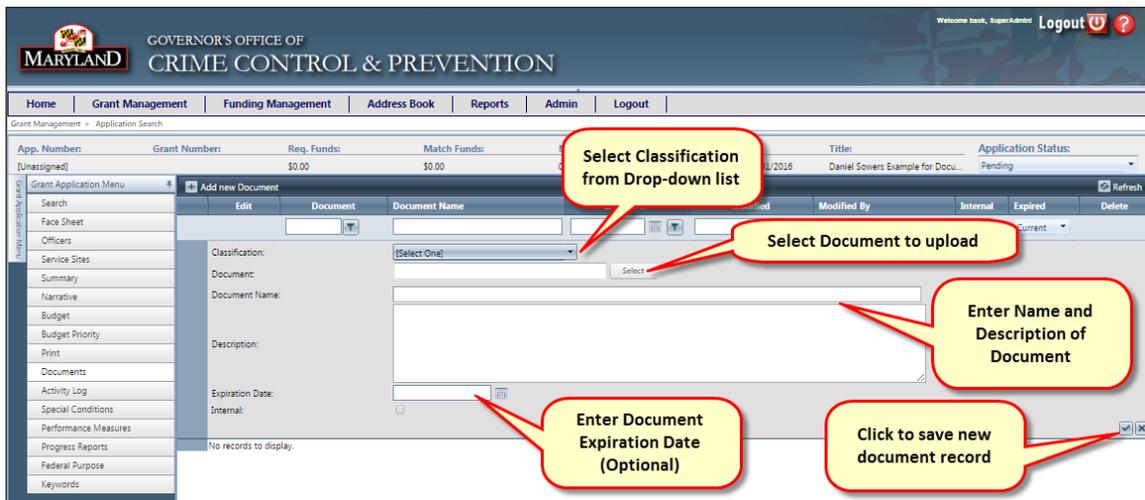


Figure 158 – New Document Data Entry Screen

3. Select a classification for the document from the Classification drop-down list.

- Click the Select button beside the Document field. This brings up a standard dialog box that allows you to search for the document on your hard disk and select it. If your computer runs the Microsoft Windows 7 operating system, the dialog will appear similar to the following figure:

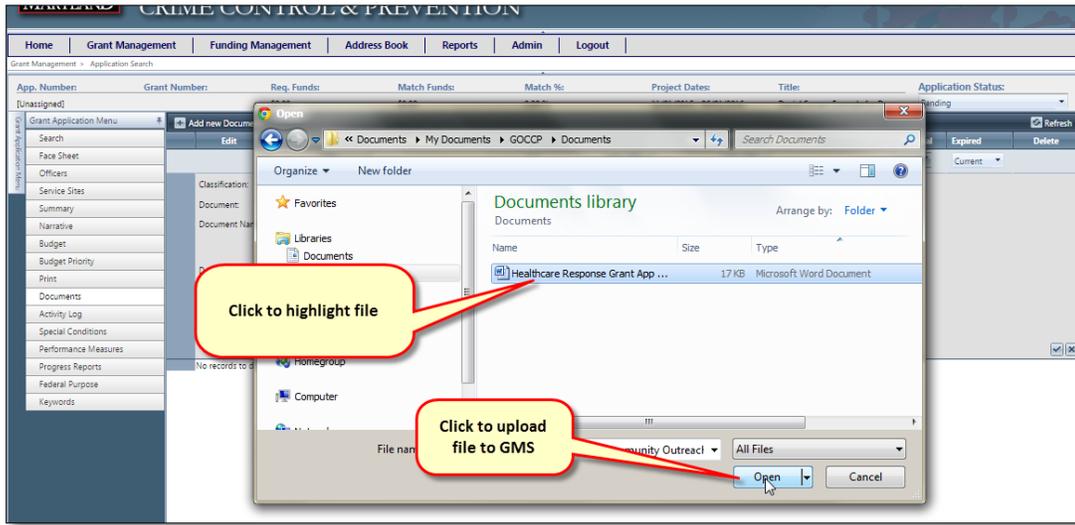


Figure 159 – Select File from Computer to Upload to GMS

- Browse your computer for the file you wish to upload. When you locate the file, click on it to highlight it, then click the Open button to upload the file to GMS.
- If your computer is running a different operating system, the dialog box may appear differently – you would still just browse for the file and select it to upload it.

After you select the document to upload, you are returned to the Data Entry screen and the document you uploaded is listed next to the Document label. Complete the remaining fields as follows:

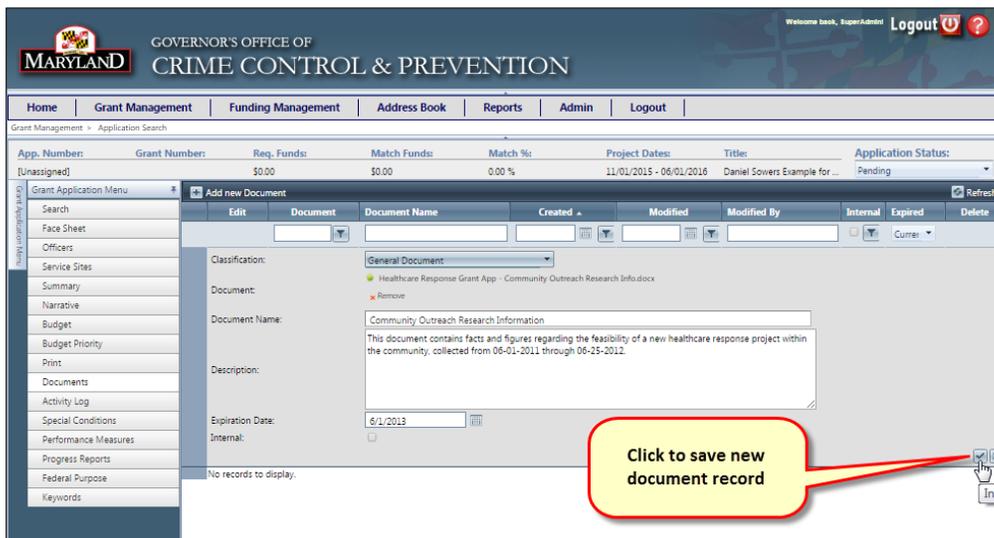


Figure 160 – Complete Remaining Data Entry

- Type a descriptive name for the document in the Document Name field.
- Type a detailed description of the document into the Description field.

7. If applicable, add a date that the document will no longer be available. Either click the calendar icon next to the Expiration Date field and choose a date by clicking on it, or type the date directly into the Expiration Date text field in the format MM/DD/YYYY (ex. 05/01/2013).
8. (Accessibility based on permission) Click to place a checkmark in the Internal checkbox to mark the document as Internal (GOCCP user only).
9. Click the checkmark icon to the lower left of the screen to upload and save the document to the Funding Program. If you click on the cancel icon (X), the document will not be uploaded or saved and you'll be returned to the previous screen. The newly added document is now displayed in the Documents list:



Figure 161 – New Document Record Displayed in List

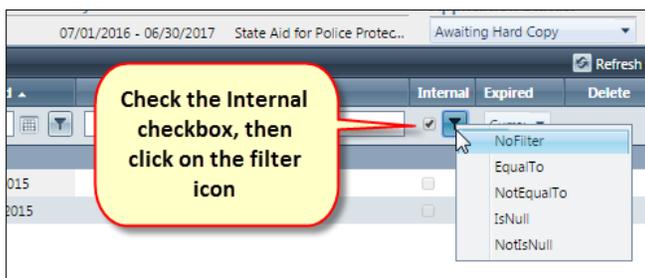
### 7.3.1.10.1.1 Working with Documents (Accessibility based on permission)

#### 7.3.1.10.1.1.1 Internal / External Documents

When documents are uploaded to GMS, they can be marked as Internal (see step 8 in prior procedure). Doing so will ensure that only GOCCP personnel can see the document. If a document is not checked as Internal, it is External by default and can be seen by whoever is viewing the application or award.

When viewing a list of documents, you can use the Filter in the Internal column to determine how you want to see internal or external documents:

1. When viewing the documents list, first click to place a check in the checkbox next to the filter in the Internal column heading. Then click the filter icon.



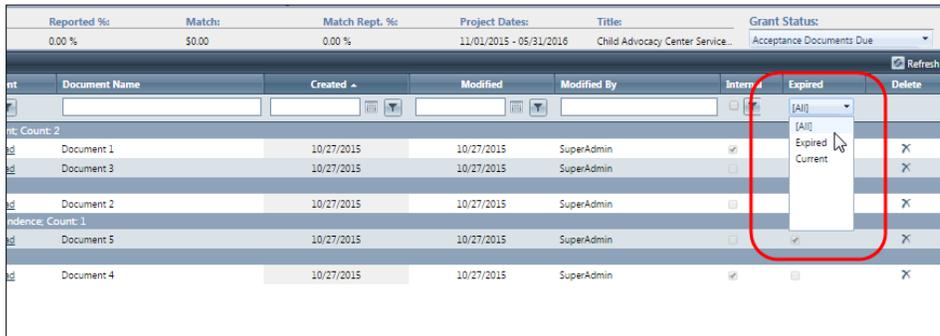
2. The filter allows you to specify how you want to view internal documents. Select:
  - a. EqualTo to show you every document that is checked as Internal
  - b. NotEqualTo to show you every document that is **not** checked as Internal

### 7.3.1.10.1.2 Expired Documents

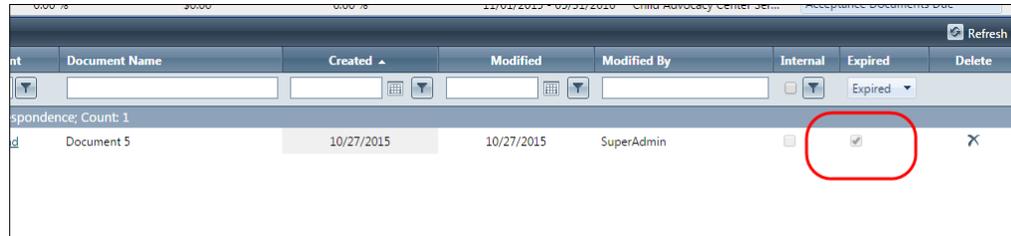
When a document is added to a grant award it can be assigned an expiration date. When viewing the list of documents for a grant award, you can apply a filter to view all documents, only current documents (documents that are not yet expired) or expired documents only.

To use the Expired filter:

1. Click the arrow on the drop-down list in the Expired column:



- a. Click **All** to view all documents regardless of their expiration status.
- b. Click **Expired** to view only expired documents. A checkmark will appear in the checkbox in the Expired column and only expired documents will be displayed.



- c. Click **Current** to view only documents that are not expired:



### 7.3.1.10.2 Generate and Review a Draft (Pending Submission) Hardcopy of the Grant Application

Hardcopies generated *before completing electronic submission* say “Pending Submission” and will not be accepted by GOCCP. Use this hardcopy of the application as a review tool. After you electronically submit the application, you can generate and print a final hardcopy, which you will deliver to the GOCCP manually.

1. Use the instructions in this section to generate a *draft* hardcopy of your complete application in PDF format.
2. Print the hardcopy or view the PDF on your computer and review it for completeness. If you notice incomplete or incorrect information, edit the relevant section of the application using the instructions in Sections 7.3.1.3 through 7.3.1.9.
3. Repeat the first two steps until the application is complete and all the information is correct. At this point you can proceed to the next section and electronically submit the application.

**To generate a draft hardcopy of your grant application in PDF format:**

1. Click **Print** in the Grant Application Menu.

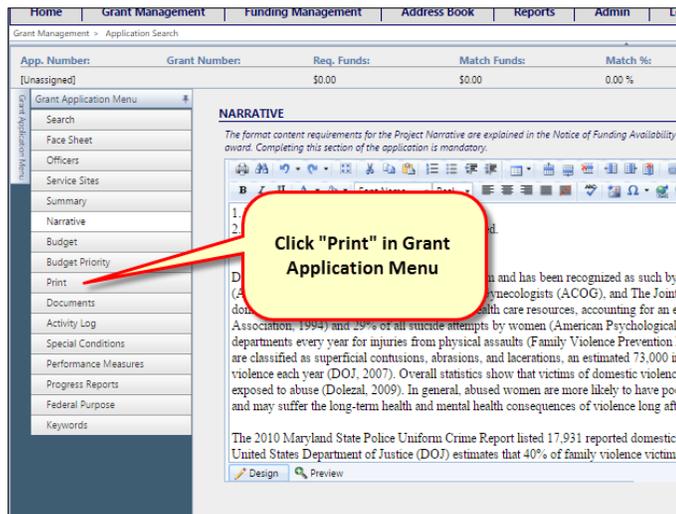


Figure 162 – Access Print from Grant Application Menu

2. Click the **Report** drop-down list arrow and select the report you want to print.

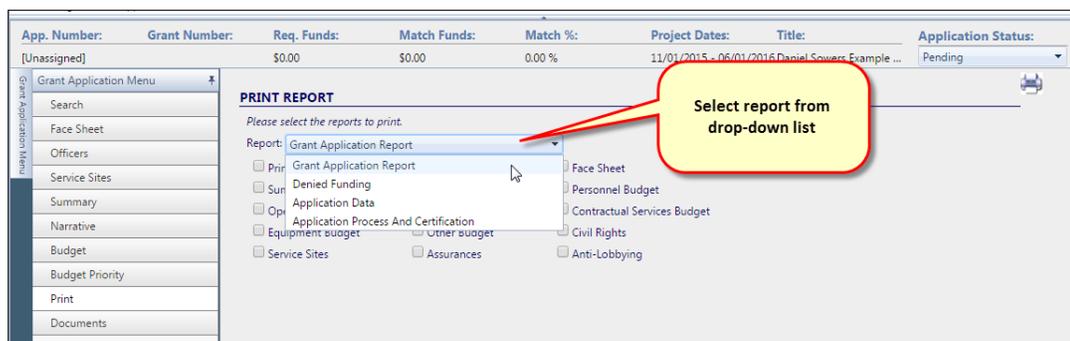


Figure 163 – Select Report from Drop-down List

- The "Grant Application Report" is a complete report of your application and contains several forms. Click in the checkbox beside each form you wish to be included in the report, or click in the checkbox beside "Print All Forms" to select all forms automatically.

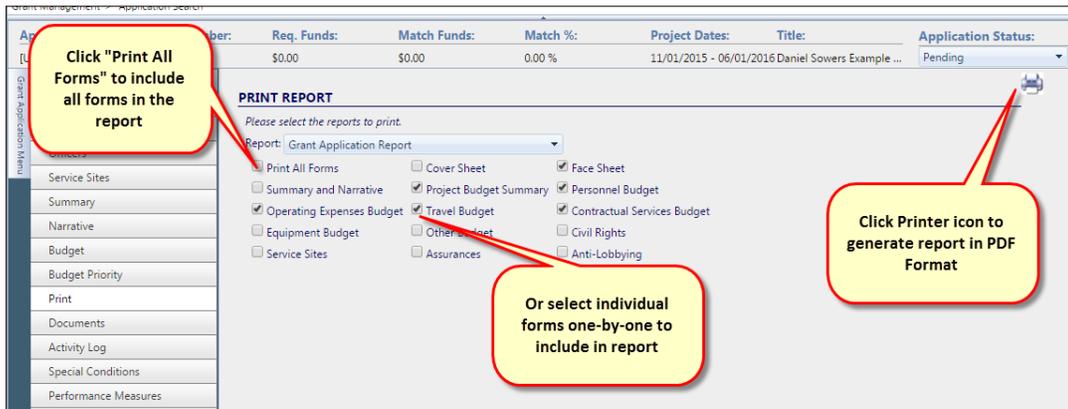


Figure 164 – Select Forms to Include in Report

- Click on the **Printer icon** to generate a report containing the items you selected.
- If you are using Microsoft Internet Explorer, a dialog box will appear at the bottom of the browser when the report is ready:

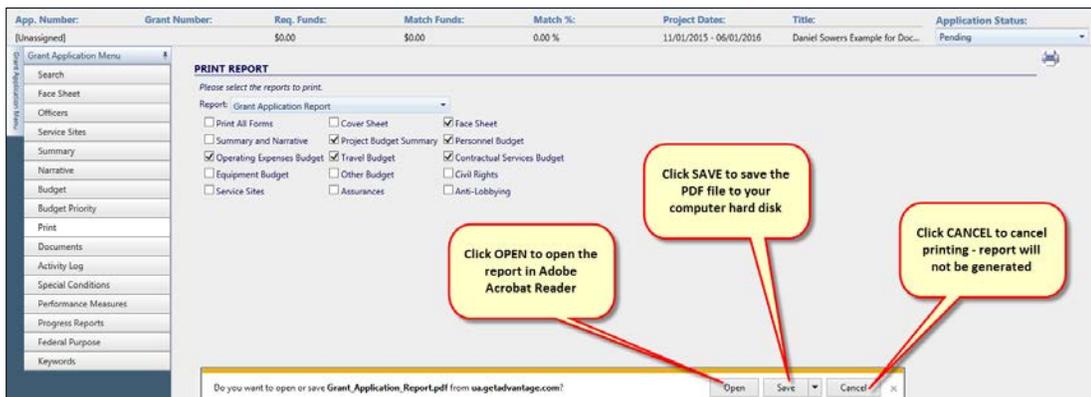


Figure 165 – Select Forms to Include in Report

- Click **OPEN** to view the report in Adobe Acrobat Reader, click **Save** to save the PDF file to your computer hard disk, or click **CANCEL** to cancel generation of the report.
  - If you use a different browser, you will still have the same options, but they may be presented differently.
- If you selected **OPEN**, the report will now be displayed in Adobe Acrobat Reader:

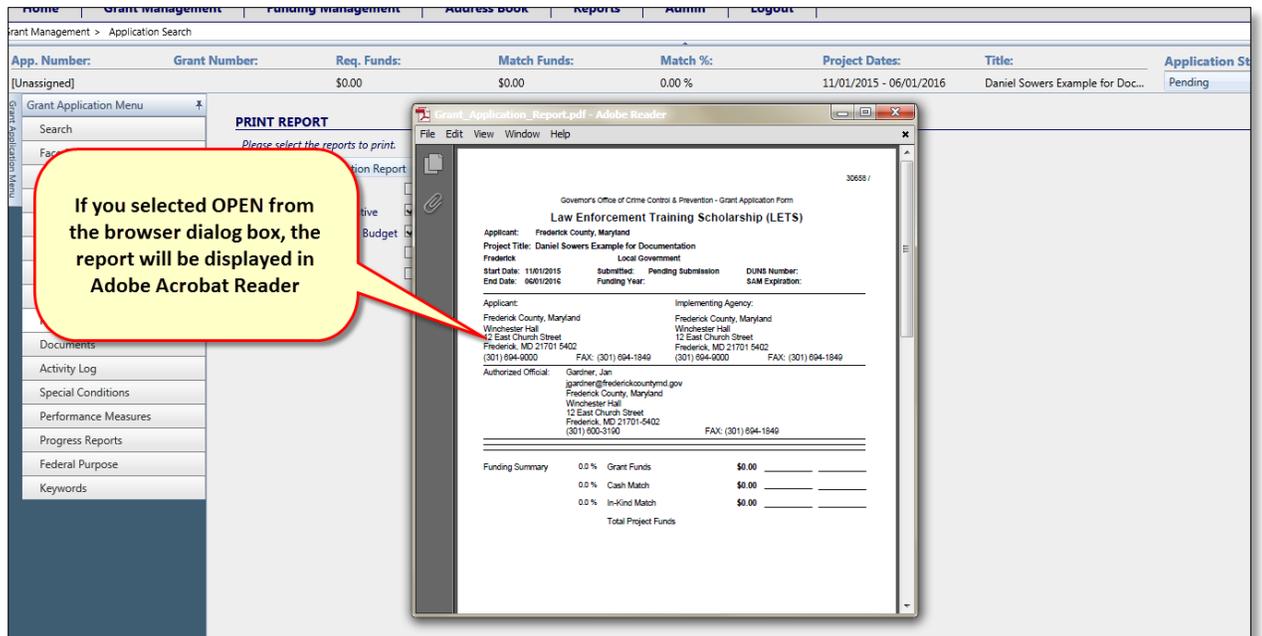


Figure 166 – Select Forms to Include in Report

## Review your Grant Application

Be sure to carefully review all of the forms you printed as part of your application.

In addition to checking it for completeness, ensure that contact names and addresses, email addresses, and signature lines are all present and correct. Often when any of these items are missing or incorrect, it means your user ID or other contact information may have not been set up correctly in GMS. For example:

- If the name of the Authorized official is missing from the signature line of the Assurances or Anti Lobbying forms, then an Authorized Official must be assigned to the Organization. Select Address Book, Organizations, Edit Organization, and use the drop down list to select an Authorized official (refer to Section Navigating GMS for further instructions if necessary). The application report will now include the name of the Authorized Official.
- If the email or address in a letter is missing, then your contact information in the GMS address book needs to be updated.
- If you (or your implementing agency) address is missing, then your organization's information needs to be updated in the GMS address book.
- If you notice any of these issues with your reports, please contact GMS support to have your information updated or corrected.

If you notice incomplete or incorrect information, edit the relevant section of the application using the instructions in Sections 7.3.1.3 through 7.3.1.9 accessible via the Grant Application Menu:

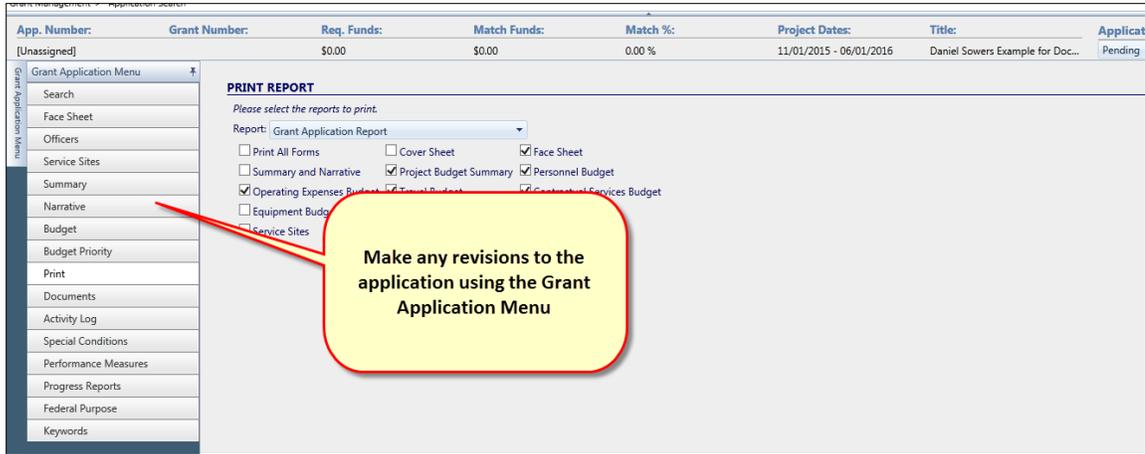


Figure 167 – Make Revisions using the Grant Application Menu

You can print a draft grant application report at any time after making revisions. When you have completed the application, proceed to the next step and electronically submit the application.

### 7.3.1.10.3 Electronically Submit Grant Application to GOCCP

1. Submit your application to GOCCP by clicking in the Status drop-down list and selecting **Submit Application**.

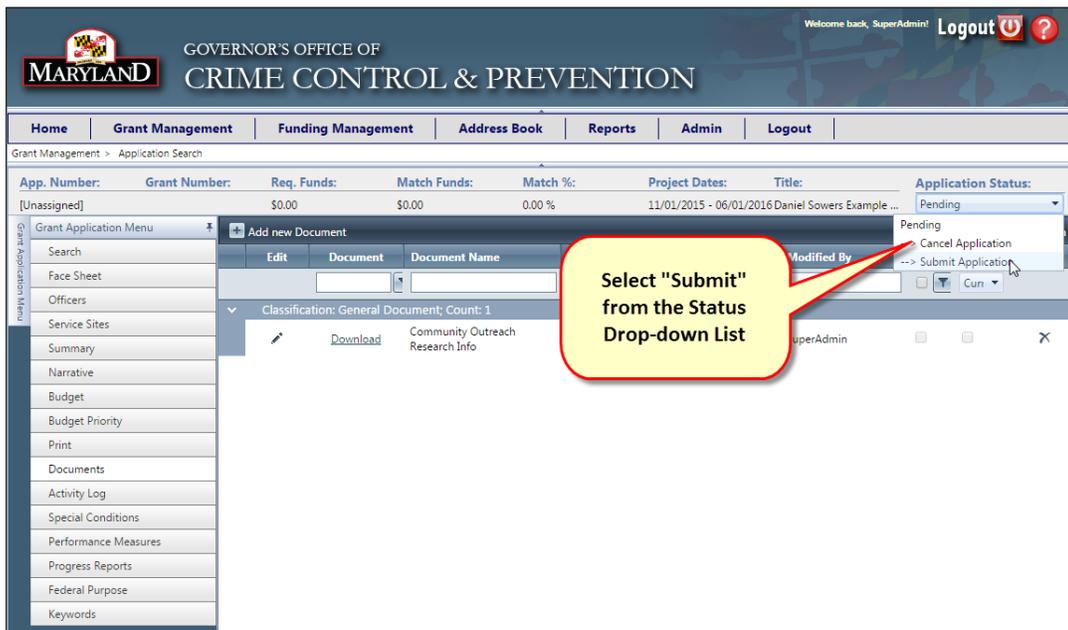


Figure 168 - Submit Application to GOCCP by Changing Status to Submit Application

2. The Submit Application process validates rules to make sure all required fields are completed and correct.
3. If validation fails, a list of required fields will display indicating what needs to be completed in Grant Application

4. When validation is successful, the status will change to “Application Submitted” and a message is displayed to confirm that your application has been submitted.

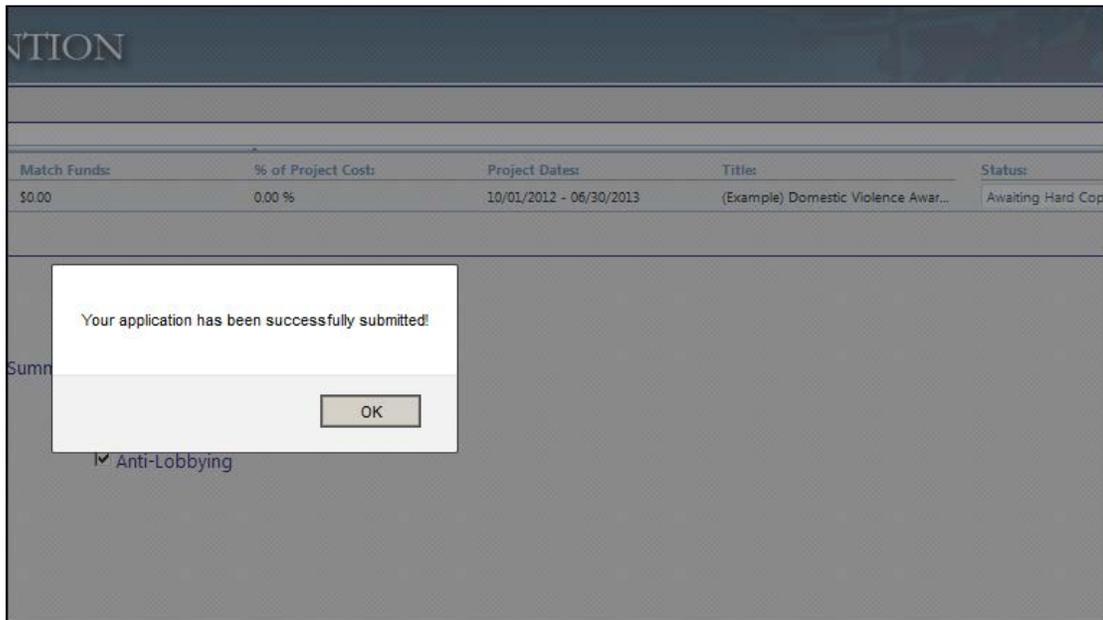


Figure 169 - Submission Confirmation Message

5. Click the OK button in the submission confirmation dialog box, which will bring you directly to the Print screen where you can print the final hardcopy which you will deliver to GOCCP manually, as described in the following section.

#### 7.3.1.10.4 Prepare and Deliver Hardcopy of Application

When you generate a report after successfully submitting the application in GMS, the report will no longer contain the text “Pending Submission”, and can be delivered to GOCCP in hardcopy format. Refer to the instructions in Section 7.3.1.10.2 for printing your hardcopy report. To complete the application process:

- Collect Proper Signatures (have the Authorized Official for the Applicant Agency sign in the appropriate places)
- Make Appropriate Number of Photocopies (as required by the NOFA) and attach any letters of support or other documents to the paper application
- Deliver Application Hardcopy to GOCCP: An original and appropriate number of copies need to be delivered to GOCCP by the hardcopy deadline. The number of copies and deadline dates are outlined in the hardcopy NOFA.

#### 7.3.1.11 View New Grant Application in Home Page

1. You can now view your newly submitted application.
2. Click **Home** to return to your home screen.



Figure 170 - Click Home to Return to your Home Screen

3. Your new application will appear in the Applications Dashboard, with the *Status of Awaiting Hardcopy*.

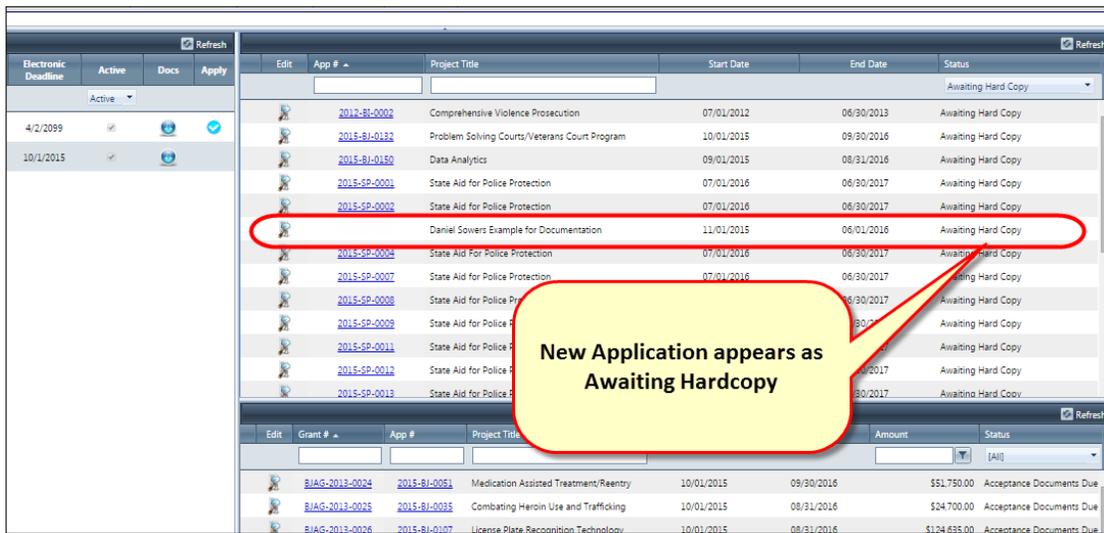


Figure 171 - New Application is displayed in Home Screen - Applications Dashboard

### 7.3.2 Withdraw a Grant Application (Internal Process)

GOCCP administrators with the appropriate permissions can withdraw an application any time before the grant is awarded.

1. Locate the application you want to withdraw in the Grant Applications Dashboard
2. Click the Edit icon to bring the application up in the Grant Application Menu
3. Click the Status drop-down box and select "Withdraw Application"
  - The grant application will automatically be withdrawn and the status will be changed to "Application Withdrawn".



Figure 172 - Withdraw Grant Application

### 7.3.3 Add a Budget Revision

#### 7.3.3.1 About Budget Revisions

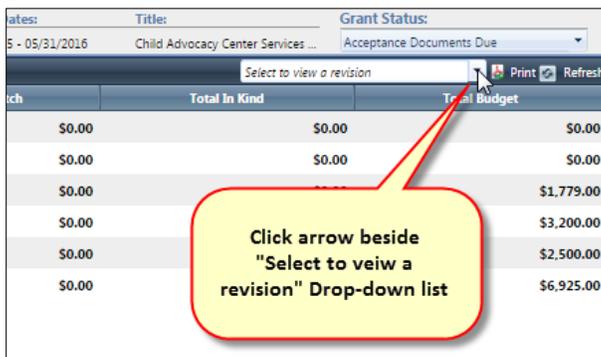
In GMS, the original (empty – unpopulated) budget for a grant application is called the **Original Grant Application Budget**. When you populate a budget for the first time, it is called **Budget Revision 0**.

- Any time you revise, update, or add line items to your project budget after it was originally submitted, a **Budget Revision** is created and an auto-incremented number follows (for example, Budget Revision 0, Budget Revision 1 and so on).
- This provides you with an audit trail of all changes made to your project budget; each revision can be viewed individually at any time from the main project budget screen by using the Budget Revision Drop-down List.

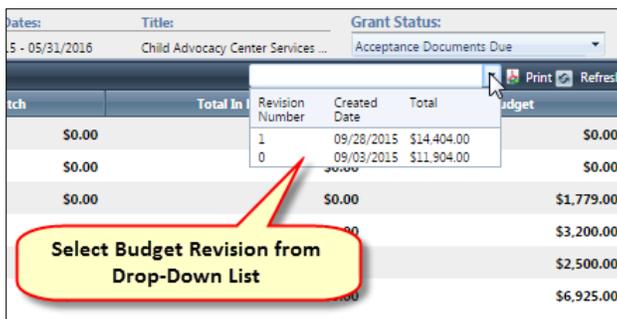
##### 7.3.3.1.1 Budget Version Drop-down List

To view prior versions of a budget using the Budget Version Drop-Down List:

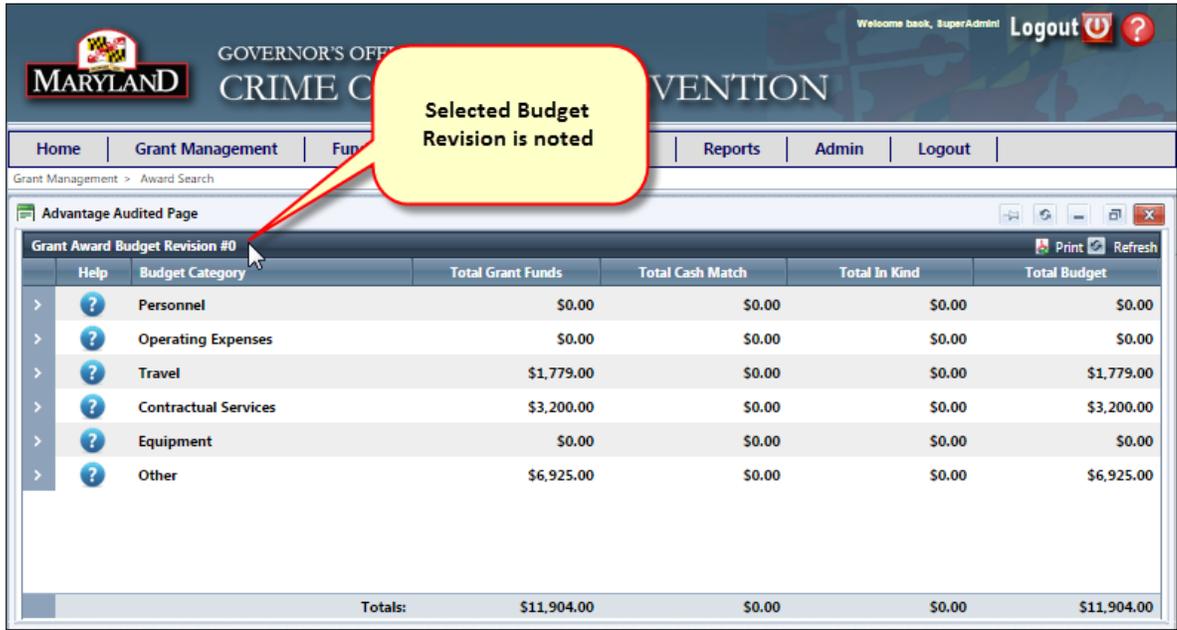
1. Locate the **Budget Version Drop-Down List** and click the arrow to bring up the list:



2. The drop-down list provides a list of all budget revisions – click on a revision to select it:



- The version of the budget you selected is now displayed. Note that in this example, budget revision number 0 was selected. This is reflected in the upper-left corner of the screen:



### 7.3.3.2 Creating a Budget Revision

Following is a summary of steps involved in creating a budget revision for your project:

NOTE: Before proceeding, it may be helpful to generate a printed budget notice.

- Begin by clicking on Add New Budget Revision. The Add New Budget Revision window is displayed:



Figure 173 - Add New Budget Revision

- The Add New Budget Revision window is displayed, maximized and pinned within the process area. In the upper-right corner of the windows are icons that allow you to resize the window so that you can simultaneously view the most recent version while you're editing the new revision:

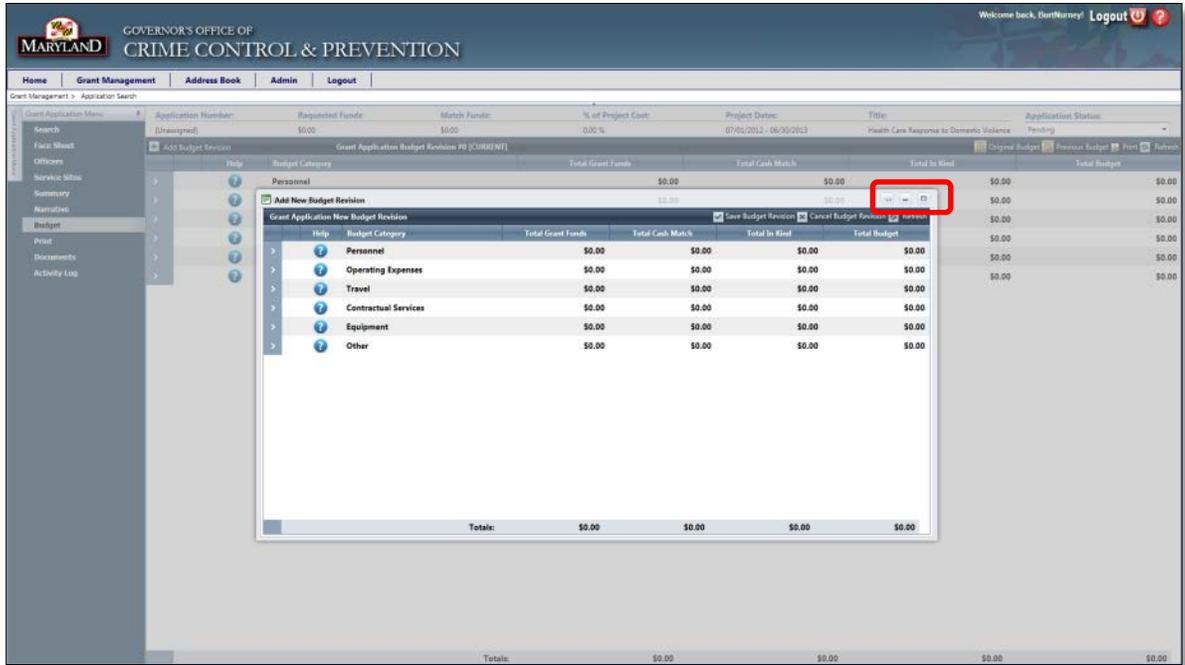


Figure 174 - Add New Budget Revision Window (Resized to view Current Budget Revision)

**NOTE:** Although you can view the most recent budget revision in the background, while the Add New Budget Revision window is active – maximized or not – you can only work within it; to get back to the main Budget Revision screen you must either save or cancel editing the new revision.

1. Click the **Expand** icon next to the Budget Category you want to add a new entry for. For this example procedure, click the **Expand** icon next to the **Personnel** Budget Category. Then click the **+** icon beside **Add New Record**.

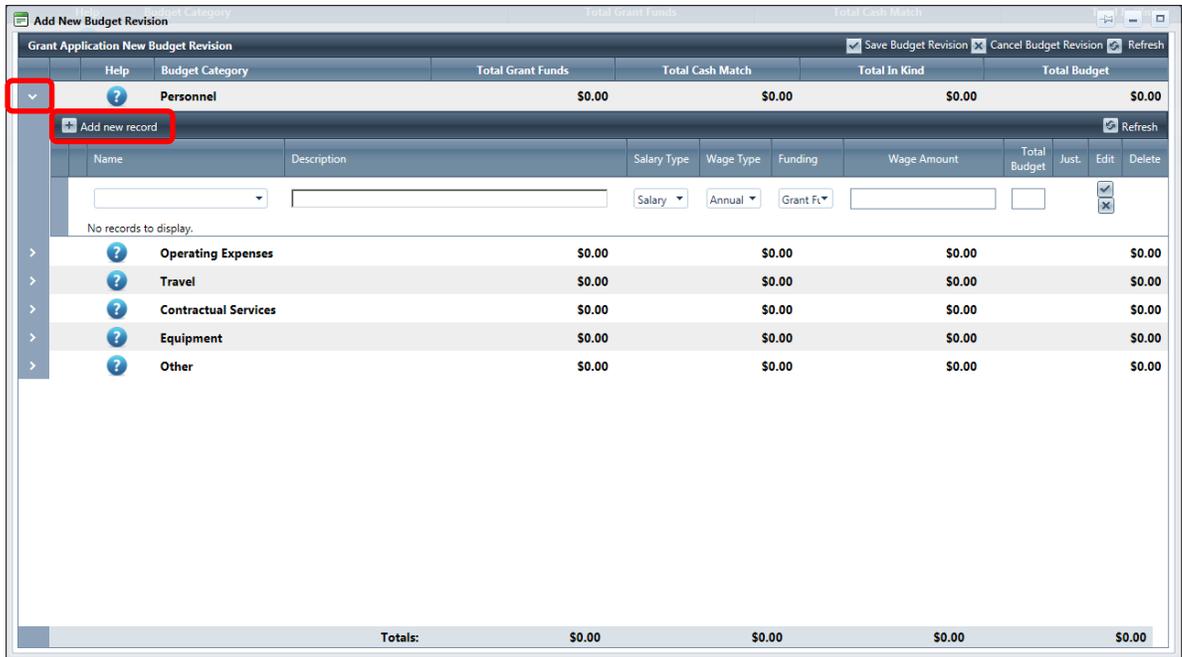


Figure 175 - Expand Budget Category and Add New Record

2. Add the required information to the new Personnel record as described below.



Figure 176 - Add Line Item Information

- **Name:** If available, type the name of the person in your organization you want to fund with this grant. If you have not yet hired the person or assigned someone to this position, leave this field blank.
- **Description:** Briefly describe the person's role (for example: New Admin Assistant)
- **Salary Type:** Indicate whether the line item is considered Salary, Fringe, or Overtime
- **Wage Type:** Indicate whether the line item is Salary or Hourly
- **Funding:** Select the means by which the position will be funded – Grant Funds, Cash Match, or In-Kind Match.

**The following provisions apply to match requirements:**

- ⇒ The sub-recipient may satisfy the match requirement with either CASH (e.g., funds contributed from private sources or State and local governments such as a portion of someone's salary) or
- ⇒ IN-KIND services (e.g., services or goods donated by the applicant organization or other entities such as a volunteer or donated food)
- ⇒ Funds from other Federal sources may not be used to meet the match requirement.
- ⇒ Funds or in-kind resources used as match must be directly related to the project goals and objectives.

- ⇒ Sub-recipients must maintain records which clearly show the source, the amount, and the timing of all matching contributions.
- ⇒ Sources of match are restricted to the same requirements as funds allocated under the federal program and must be documented in the same manner as federal program funds, including financial and programmatic reports.

- **Annual Salary:** Enter the annual salary for the position. If it is an hourly position, you must annualize it to calculate the annual salary and enter it here.
- **Requested Amount:** Enter the amount of funds you are requesting for this resource.

3. Click the **Checkmark** below **Edit** to add the new line item to the Personnel budget category. If you click the **X** button instead, the information you entered for this line item will be lost and you will be returned to the **Add New Budget Revision** window.



Figure 177 - Save new budget line item

4. After your new line item is saved, you are returned to the **Add New Budget Revision** window:

Help	Budget Category	Total Grant	Total Cash Match	Total In Kind	Total Budget
?	Personnel	\$10,000.00	\$0.00	\$0.00	\$10,000.00
?	Operating Expenses	\$0.00	\$0.00	\$0.00	\$0.00
?	Travel	\$0.00	\$0.00	\$0.00	\$0.00
?	Contractual Services	\$0.00	\$0.00	\$0.00	\$0.00
?	Equipment	\$0.00	\$0.00	\$0.00	\$0.00
?	Other	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals:</b>		<b>\$10,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$10,000.00</b>

Figure 178 - Budget Totals Updated based on New Line Item

The following budget amounts are updated to reflect the newly added line item:

- Budget Category Total for each Match Type
- Total of all Categories for each Match Type
- Total Project Budget

5. Similarly you can delete a previously entered budget item by clicking the X in the Delete column.

Description	Funding	Quantity	Unit Cost	Total Budget	Just.	Edit	Delete
DV Shelter repairs	Grant Funds	20	0.1	\$2,000.00	Justificat [...more...]		X

- Repeat the steps above for each budget entry you wish to make (expand category, add new record, enter line item information, and save the entry).

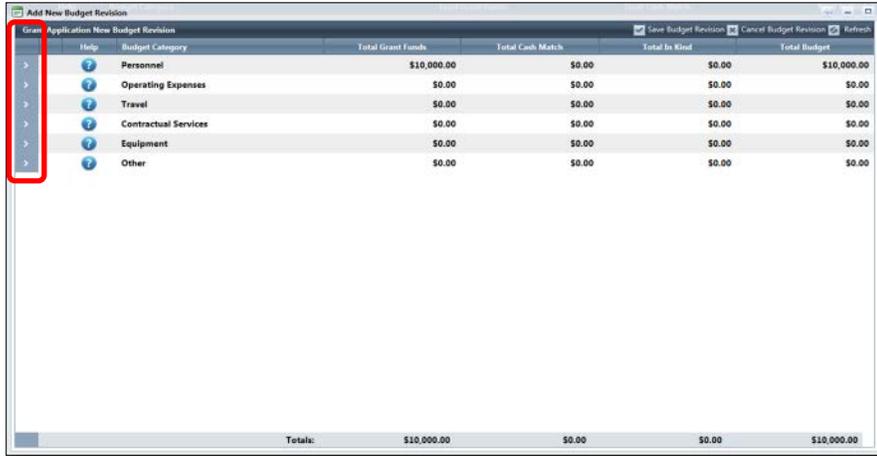


Figure 179 - Complete Remaining Budget Entries

- When you've entered all of your budget line items, click the **Checkmark** beside **Save Budget Revision**.

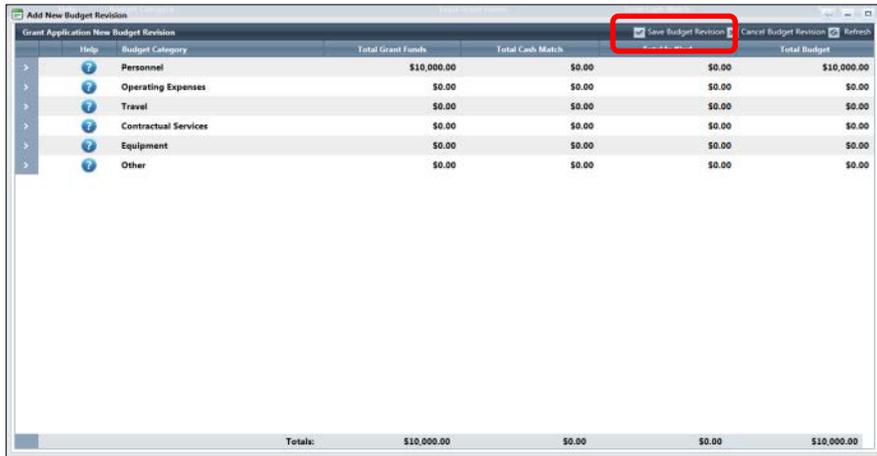


Figure 180 - Click Save Button to Save Budget Revision

- You are returned to the main **Budget Revision** screen and see a new Budget Version Number:

Help	Budget Category	Total Grant Funds	Total Cash Match	Total In Kind	Total Budget
?	Personnel	\$0.00	\$0.00	\$0.00	\$0.00
?	Operating Expenses	\$0.00	\$0.00	\$0.00	\$0.00
?	Travel	\$0.00	\$0.00	\$0.00	\$0.00
?	Contractual Services	\$0.00	\$0.00	\$0.00	\$0.00
?	Equipment	\$0.00	\$0.00	\$0.00	\$0.00
?	Other	\$2.00	\$0.00	\$0.00	\$2.00
Totals:		\$2.00	\$0.00	\$0.00	\$2.00

Figure 181 - Returned to main Budget Revision screen with a new budget version number

**NOTE:** While your new budget is saved, you must provide a justification for each entry in order to submit your application, as described in Section 6.2.1.9.

## 7.4 Viewing Grant Applications and Awards by Funding Year

The GMS Grant Management screen provides a central location to view all Funding Years and any grant applications and awards associated with them. To access this screen:

1. Select Grant Management from the main Grant Management menu in the navigation bar:

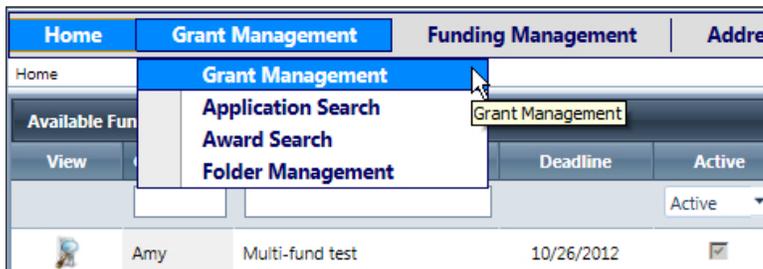


Figure 182 - Access the Grant Management Screen

2. The Grant Management screen is displayed:

Title	Online Deadline	Hard Copy Deadline	Funding Year
> Baltimore City Community Policing - 2005	09/30/2003	09/30/2003	2005
> Baltimore City Community Policing - 2006	09/30/2004	09/30/2004	2006
> Baltimore City Community Policing - 2007	09/30/2005	09/30/2005	2007
> Baltimore City Community Policing - 2008	09/30/2006	09/30/2006	2008
> Baltimore City Community Policing - 2009	09/30/2007	09/30/2007	2009
> Baltimore City Community Policing - 2010	09/30/2008	09/30/2008	2010
> Baltimore City Community Policing - 2011	09/30/2009	09/30/2009	2011
> Baltimore City Community Policing - 2012	09/30/2010	09/30/2010	2012
> Baltimore City Community Policing - 2013	09/30/2011	09/30/2011	2013
> Baltimore City Firearm Investigation Violence Prevention Program - 2006	09/30/2004	09/30/2004	2006
> Baltimore City Firearm Investigation Violence Prevention Program - 2007	09/30/2005	09/30/2005	2007
> Baltimore City Firearm Investigation Violence Prevention Program - 2008	09/30/2006	09/30/2006	2008
> Baltimore City Firearm Investigation Violence Prevention Program - 2009	09/30/2007	09/30/2007	2009
> Baltimore City Firearm Investigation Violence Prevention Program - 2010	09/30/2008	09/30/2008	2010
> Baltimore City Firearm Investigation Violence Prevention Program - 2011	09/30/2009	09/30/2009	2011
> Baltimore City Firearm Investigation Violence Prevention Program - 2012	09/30/2010	09/30/2010	2012
> Baltimore City Firearm Investigation Violence Prevention Program - 2013	09/30/2011	09/30/2011	2013
> Baltimore City Foot Patrol - 2005	09/30/2003	09/30/2003	2005
> Baltimore City Foot Patrol - 2006	09/30/2004	09/30/2004	2006

Figure 183 - GMS Grant Management Screen

3. Locate the Funding Year you wish to view, and click the Expand icon next to that Funding Year record. Any Grant Applications associated with the Funding Year are shown nested below the record and sorted by Application Number.

App Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Add Award
> 2012-BI-0001	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	Awarded	07/01/2012	06/30/2013	8		
> 2012-BI-0002	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	Awaiting Hard Copy	07/01/2012	06/30/2013	8		

Figure 184 - Expanded GFD Record in Grant Management Screen

4. To view grant awards associated with an application, click the Expand icon next to the application record. Awards associated with that application appear nested below the application record.

App Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Add Award
> 2012-BI-0001	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	Awarded	07/01/2012	06/30/2013	8		
> Award Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Reports
> BCFI-2013-1801	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	Acceptance Documents Due	07/01/2012	06/30/2013	8		
> 2012-BI-0002	Office of the State's Attorney for Baltimore City	Comprehensive Violence Prosecution	Awaiting Hard Copy	07/01/2012	06/30/2013	8		

Figure 185 - Grant Management -> GFD -> Application -> Award

5. To view details about, or edit the grant application associated with the Funding Year record, click on the magnifying glass icon in the Edit column of the Application list under the expanded record. NOTE: This causes you to exit the Grant Management screen. If you wish to edit a grant award listed below the application, skip to Step 7.

Baltimore City Community Policing - 2012				09/30/2010	09/30/2010	2012		
App Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Add Award
2011-BC-0005	Baltimore Police Department	Neighborhood Community Policing	Awarded	07/01/2011	06/30/2012	8		
Award Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Reports
BCCP-2012-1801	Baltimore Police Department	Neighborhood Community Policing	Award In Compliance	07/01/2011	06/30/2012	8		

Figure 186 - Edit an Application associated with a GFD

- Clicking the Application magnifying glass icon takes you to the Grant Application menu screen.

Welcome back, Dant! [Logout](#)

**MARYLAND** GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION

Home | Grant Management | Funding Management | Address Book | Reports | Admin | Logout

Grant Management > Grant Management

Grant Menu	App. Number:	Requested Funds:	Match Funds:	% of Project Cost:	Project Dates:	Title:	Application Status:
Search	2011-BC-0005	\$1,974,000.00	\$0.00	0.00 %	07/01/2011 - 06/30/2012	Neighborhood Community P...	Awarded

**PROJECT TITLE**

Project Title: Neighborhood Community Policing

**APPLICANT AGENCY**

Baltimore Police Department

Is service site?

Address: c/o Commissioner Frederick H. Bealefeld, III  
242 West 29th Street

City, State Zip: Baltimore, MD 21211  
Org. Type: Local Government  
County: Baltimore City  
Auth. Official: Anthony Barksdale

**IMPLEMENTING AGENCY**

Baltimore Police Department

Is service site?

Address: c/o Commissioner Frederick H. Bealefeld, III  
242 West 29th Street

City, State Zip: Baltimore, MD 21211  
Org. Type: Local Government  
County: Baltimore City  
Auth. Official: Anthony Barksdale

**COUNTY/MUNICIPALITY**

County: Baltimore City  
Municipality: Baltimore

**GRANT ROLES**

**PROJECT DATES**

GFD Code: BCCP

GFD Title: Baltimore City Community Policing - 2012

GFD Start Date: 7/1/2011

GFD End Date: 6/30/2013

Proposed Start Date: 7/1/2011

Proposed End Date: 6/30/2012

**FUNDING YEAR**

Program Year: 8th

**HARDCOPY RECEIVED DATE**

Hardcopy Received: 8/29/2011

**APPLICATION DATES**

Application Submitted: 8/25/2011

Submitted to Financial: 8/31/2011

**PREPARER INFORMATION**

Preparer's Name: Elise Odell

Preparer's Phone: (410) 396-2607

**DEFICIENCY STATUS**

Deficiency:

Deficiency Note:

Figure 187 - Grant Application Menu Screen

- To view details about, or edit the grant award associated with the application under the Funding Year record, click on the magnifying glass icon in the Edit column of the Award list under the expanded record.

Baltimore City Community Policing - 2012				09/30/2010	09/30/2010	2012		
App Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Add Award
2011-BC-0005	Baltimore Police Department	Neighborhood Community Policing	Awarded	07/01/2011	06/30/2012	8		
Award Number	Organization Name	Project Title	Status	Proposed Start Date	Proposed End Date	Funding Year	Edit	Reports
BCCP-2012-1801	Baltimore Police Department	Neighborhood Community Policing	Award In Compliance	07/01/2011	06/30/2012	8		

Figure 188 - Edit a Grant Award associated with a GFD

- Clicking on the Grant Award magnifying glass icon takes you to the Grant Award menu screen.

The screenshot displays the 'Grant Award Menu Screen' for grant BCCP-2012-1801. The header includes the Maryland logo and 'GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION'. The navigation menu on the left includes options like Search, Face Sheet, Funding, Officers, Service Sites, Summary, Narrative, Goals/Objectives, Budget, Print, Documents, Activity Log, Special Conditions, Performance Measures, Progress Reports, Federal Purpose, Site Visits, Audits, Notice of Dispute, Keywords, Grant Links, Close Out, Reports, and Grant Award GAN.

The main form area contains the following sections:

- Grant Information:** Grant Number: BCCP-2012-1801, Awarded: \$1,974,000.00, Award Reported %: 87.06 %, Match: \$0.00, Match Reported %: 0.00 %, Project Dates: 07/01/2011 - 06/30/2012, Title: Neighborhood Commun..., Grant Award Status: Award In Compliance.
- GRANT SEQUENCE NUMBER:** Sequence Number: 1801.
- PROJECT TITLE:** Project Title: Neighborhood Community Policing.
- APPLICANT AGENCY:** Baltimore Police Department. Address: c/o Commissioner Frederick H. Bealefeld, III, 242 West 29th Street, Baltimore, MD 21211. Org. Type: Local Government, County: Baltimore City, Auth. Official: Anthony Banksdale.
- IMPLEMENTING AGENCY:** Baltimore Police Department. Address: c/o Commissioner Frederick H. Bealefeld, III, 242 West 29th Street, Baltimore, MD 21211. Org. Type: Local Government, County: Baltimore City, Auth. Official: Anthony Banksdale.
- COUNTY/MUNICIPALITY:** [Select One]
- PROJECT DATES:** GFD Code: BCCP, GFD Title: Baltimore City Community Policing - 2012, Funding Start Date: 7/1/2011, Funding End Date: 6/30/2013, Start Date: 7/1/2011, End Date: 6/30/2012.
- AWARD DATES:** Approved Letter Pending: 8/31/2011, Award Letter Sent: 9/8/2011, Award Accepted: 9/19/2011, Accept Package Sent: 9/8/2011, Proj Commencement Recvd: 9/19/2011.
- INVENTORY:** PIRF Received: [Field]
- RISK ASSESSMENT:** Risk Assessment: Regular.
- INITIATIVE:** Initiative: [Select One]

Figure 189 - Grant Award Menu Screen

## 7.5 Managing Grant Applications

This section guides the internal GOCCP user through the process of turning a grant application into a grant award, including logging the initial receipt of a grant application, updating its status through the various reviews, and awarding the grant.

### 7.5.1 Log Receipt of Grant Application Hardcopy

After a sub-recipient successfully submits a grant application, the status of that application within GMS is changed to Awaiting Hardcopy. Once the hardcopy arrives at GOCCP the status of the application to Hardcopy Received will initially be changed by the Control Desk staff. Future changes may include Program staff.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter.

The screenshot shows the 'Application Search' screen. The table below contains the search results:

Edit	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Project Director	Amount	County
	2012-BC-0018	Center for a Healthy Maryland	Center for a Healthy Maryland	HealthCare Response to Domestic Violence	08/01/2012	05/30/2013	Abraham, Meena	\$12,500.00	Baltimore City

Figure 190 - Search for Grant Application

- Click the Edit icon beside the application record to bring up the Grant Application Menu.
- Enter the date you received the hardcopy into the Hardcopy Received Date field, then click the SAVE button.

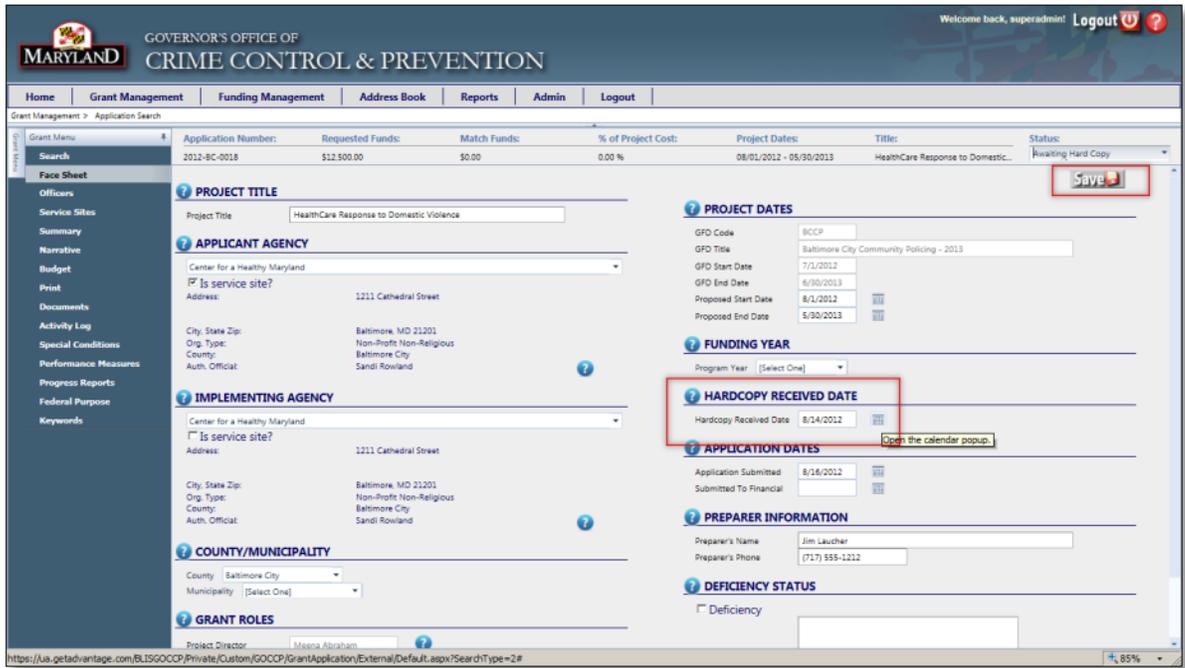


Figure 191 - Enter Hardcopy Received Date and Save

- Click on the Status drop-down box and select "Receive Hardcopy".



Figure 192 - Change Status to Receive Hardcopy

- Click the Save button when done.

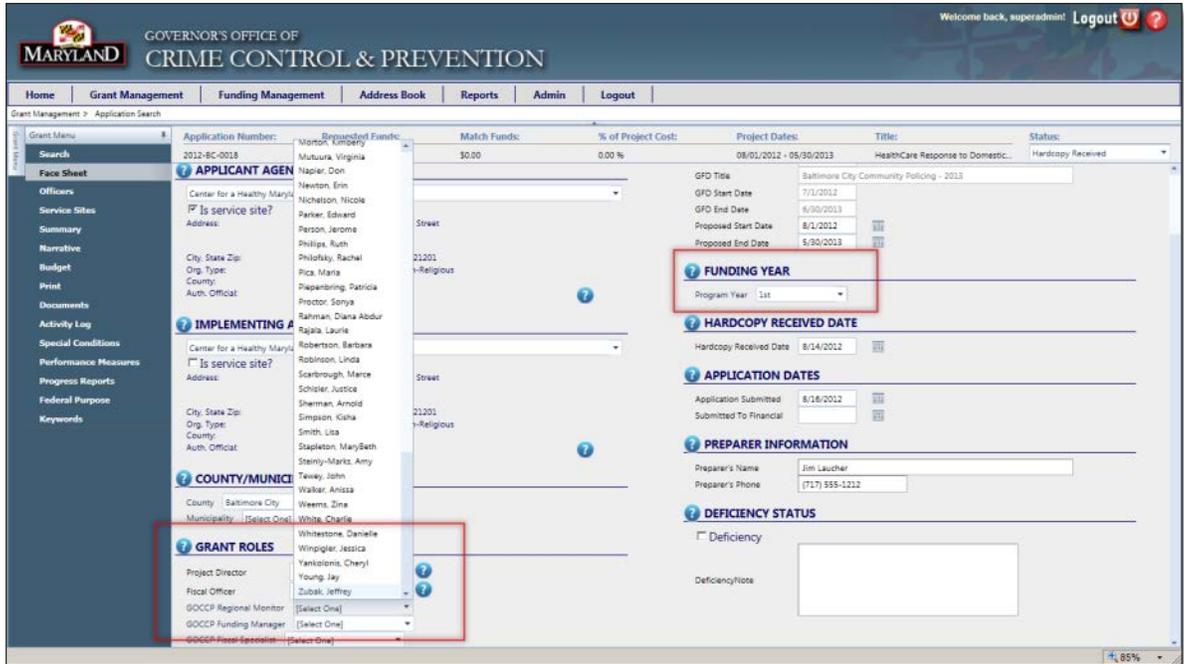


Figure 193 - Select Funding Year and Assign GOCCP Grant Roles

6. Program staff will change the status based on the completeness and correctness of the application.



Figure 194 - Change Status of Application

- Return to Awaiting Hardcopy: Use if sub-recipient has errors in the hardcopy application and must correct & resubmit. This will change the application status to Pending in the user's Grant Applications Dashboard.
- Withdraw Application: Use to cancel the application at sub-recipient request. This will not delete the application – the system will retain it and mark it as withdrawn.
- Return to Applicant: Use to unlock the application record so the user can make revisions in any part of the application and resubmit when ready.
- Begin Internal Review: Use to start the Internal Review process.

### 7.5.2 Perform an Internal Review (Peer Review)

After a sub-recipient successfully submits a grant application and the GFD Point of Contact has formally received the hardcopy, you can proceed with the Internal/Peer Review phase of the application process.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting “Hardcopy Received” from the Status drop-down list, as this will be the status of any application ready for the Internal Review (Peer Review) process. The GFD Point of Contact moves related applications from Hardcopy Received to Internal Review to indicate the reviews have begun.



Figure 195 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.
3. To proceed to the Internal/Peer Review, change the Status of the application to “Begin Internal Review”.



Figure 196 - Change Status to Begin Internal Review

The status of the application will change to “Internal Review” and will remain in this status until it is ready for the next process, which is the Pink Sheet Review. The Internal Review process includes: Budget Review, External Board/Peer Review, Executive Director Review, etc.

- Once in “Internal Review” status, the application will no longer appear in the sub-recipients Grant Applications Dashboard, as it cannot be edited while in review.

### 7.5.3 Perform a Pink Sheet Review

When a grant application has passed successfully through the Internal Review process, it moves on to the Pink Sheet Review phase, which may be assigned to program staff other than the Funding Manager. It is normally during this phase that programmatic reporting requirements (Performance Measurements and Progress Report Questions) are assigned to the application. If the grant is awarded, the sub-recipient will be responsible for completing and submitting these requirements on a quarterly basis to keep their grant in compliance.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by

selecting “Internal Review” from the Status drop-down list, as this will be the status of any application ready for the Pink Sheet Review process.



Figure 197 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.
3. To proceed to the Pink Sheet Review, change the Status of the application to “Begin Pink Sheet Review”.

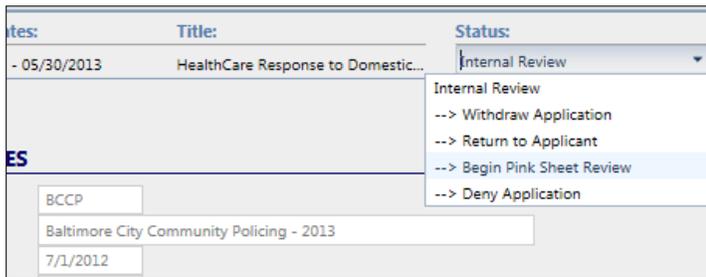


Figure 198 - Change Status to Begin Pink Sheet Review

The status of the application will change to “Pink Sheet Review” and will remain in this status until it is ready for the next process, which is Submit to Grants Manager for Review.

- While in “Pink Sheet Review” status, the application will no longer appear in the sub-recipients Grant Applications Dashboard, as it cannot be edited while in review.

After the Pink Sheet Review is initiated, you assign Programmatic Reporting requirements and Keywords to the grant application before moving on to the Grants Manager Review/Award phase:

### 7.5.3.1 Add Special Conditions to a Grant Application

1. Click Special Conditions in the Grant Menu to the left of the screen.

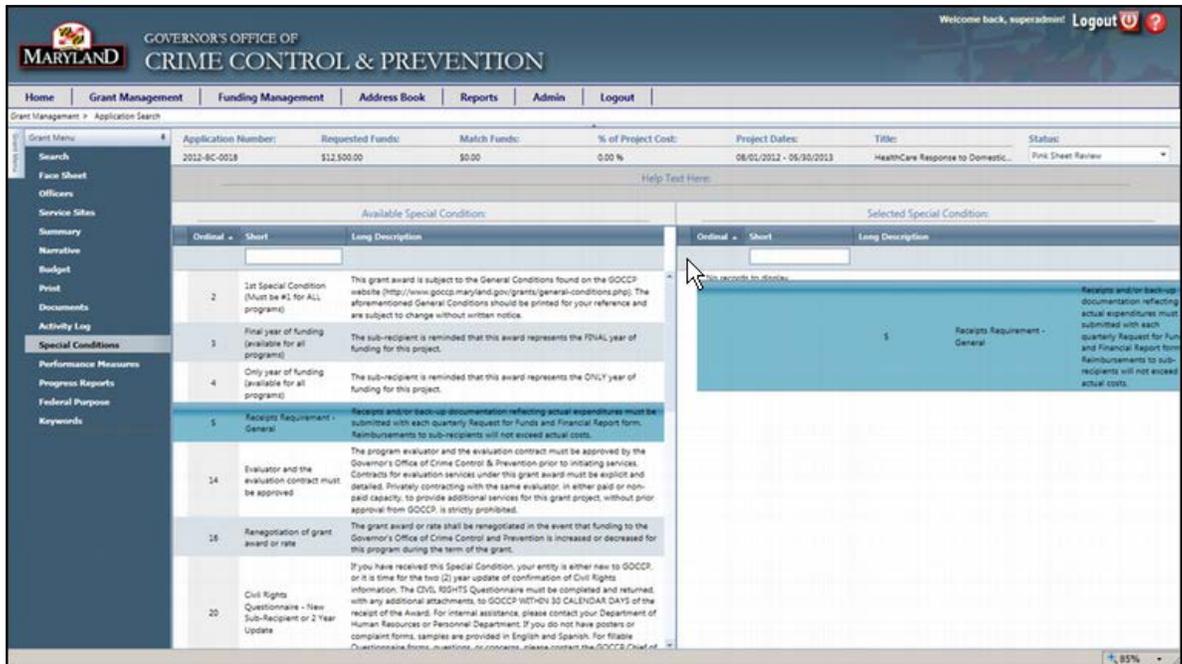


Figure 199 - Add Special Conditions to a Grant Application

- The **Available Special Conditions** pane provides a complete list of special conditions in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Special Conditions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.3) in order to appear here.
  - The **Selected Special Conditions** pane is a list of special conditions that apply to this grant application.
2. Locate the Special Condition you wish to select for this grant application. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
  3. Click on the Special Condition and hold the mouse button down.
  4. Drag it over to the Selected Special Condition Pane.
  5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
  6. Repeat steps 1 through 4 for each Special Condition you wish to select for this grant application.

### 7.5.3.2 Add Performance Measures to a Grant Application

1. Click Performance Measures in the Grant Menu to the left of the screen.

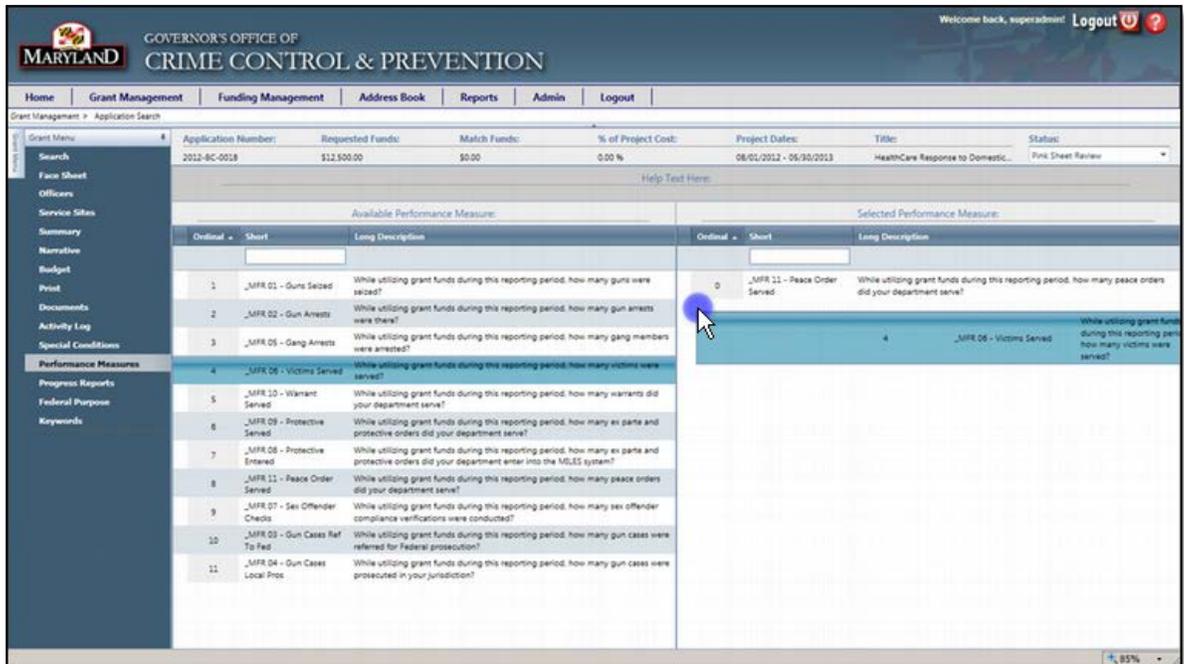


Figure 200 - Add Performance Measures to a Grant Application

- The **Available Performance Measures** pane provides a complete list of performance measures in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Performance Measures not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.4) in order to appear here.
  - The **Selected Performance Measures** pane is a list of performance measures that apply to this grant application.
2. Locate the Performance Measure record you wish to select for this grant application. Refer to the section *Sorting, Filtering, and Searching for Records* for tips on filtering and searching the list.
  3. Click on the record and hold the mouse button down.
  4. Drag it over to the Selected Performance Measure Pane.
  5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
  6. Repeat steps 1 through 4 for each Performance Measure you wish to select for this grant application.

### 7.5.3.3 Add Progress Report Questions to a Grant Application

1. Click Progress Report Questions in the Grant Menu to the left of the screen.

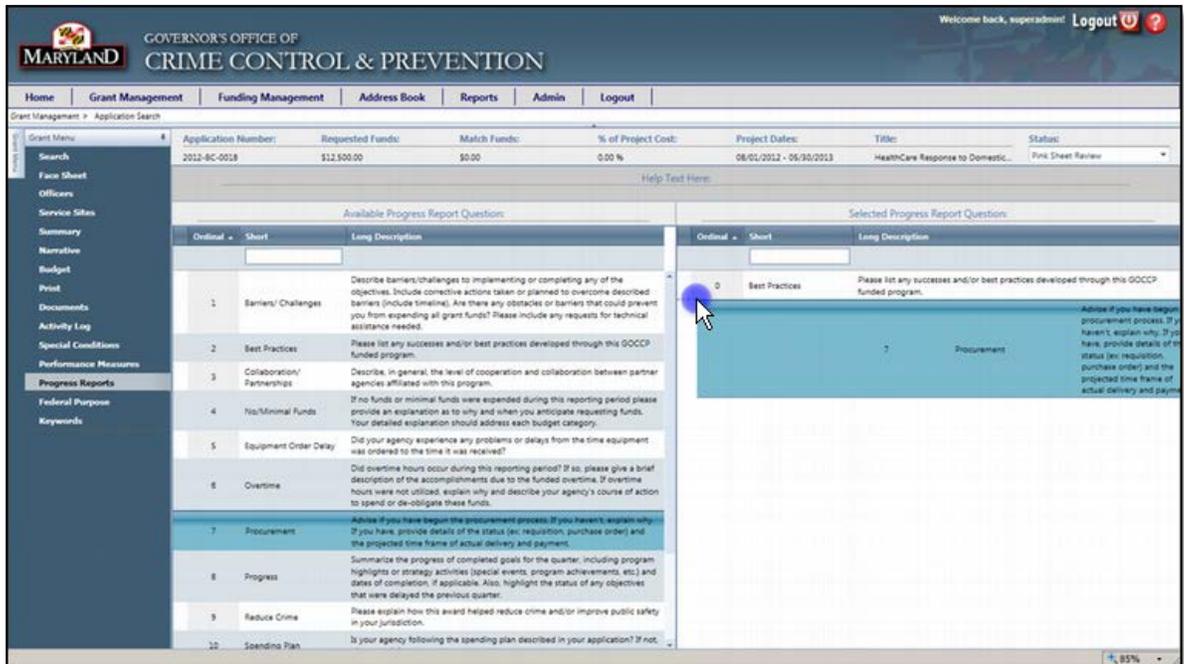


Figure 200 - Add Progress Report Questions to a Grant Application

- The **Available Progress Report Questions** pane provides a complete list of progress report questions in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Progress Report Questions not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.5) in order to appear here.
  - The **Selected Progress Report Questions** pane is a list of progress report questions that apply to this grant application.
2. Locate the Progress Report Questions record you wish to select for this grant application. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
  3. Click on the record and hold the mouse button down.
  4. Drag it over to the Selected Progress Report Questions Pane.
  5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
  6. Repeat steps 1 through 4 for each Progress Report Question you wish to select for this grant application.

### 7.5.3.4 Add Federal Purpose Areas to a Grant Application

1. Click Federal Purpose in the Grant Menu to the left of the screen.

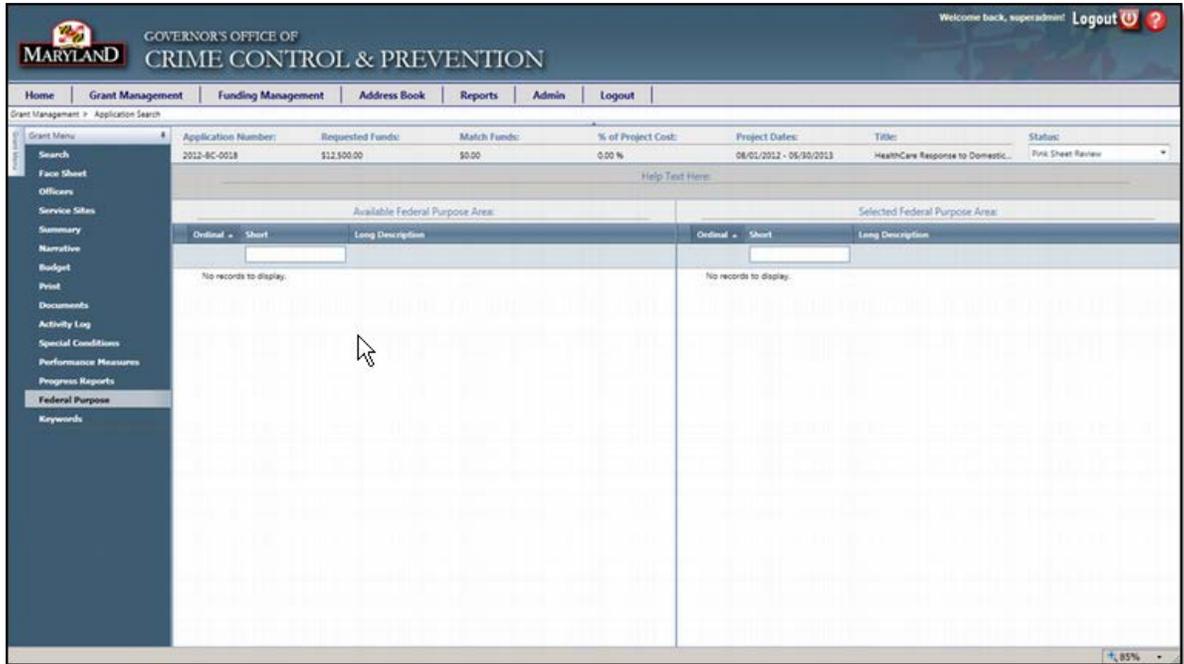


Figure 201 - Add Federal Purpose Areas to a Grant Application

- The **Available Federal Purpose Areas** pane provides a complete list of federal purpose areas in the GMS database that are associated with the Funding Program used to create the GFD on which the application is based. Federal Purpose Areas not already in the database must be added to GMS using the Admin -> Reporting Requirements tool and associated with the Funding Program (refer to Section 6.2.1.6) in order to appear here.
  - The **Selected Federal Purpose Areas** pane is a list of federal purpose areas that apply to this grant application.
2. Locate the Federal Purpose Area record you wish to select for this grant application. Refer to the section **Sorting, Filtering, and Searching for Records** for tips on filtering and searching the list.
  3. Click on the record and hold the mouse button down.
  4. Drag it over to the Selected Federal Purpose Areas Pane.
  5. When you see a dotted line appear beneath the header row, release the mouse button to drop the record into the list.
  6. Repeat steps 1 through 4 for each Federal Purpose Area you wish to select for this grant.

### 7.5.3.5 Add Keywords to a Grant Application

You must select at least one Keyword in order to process a Grant Application.

1. Click Keywords in the Grant Menu to the left of the screen.

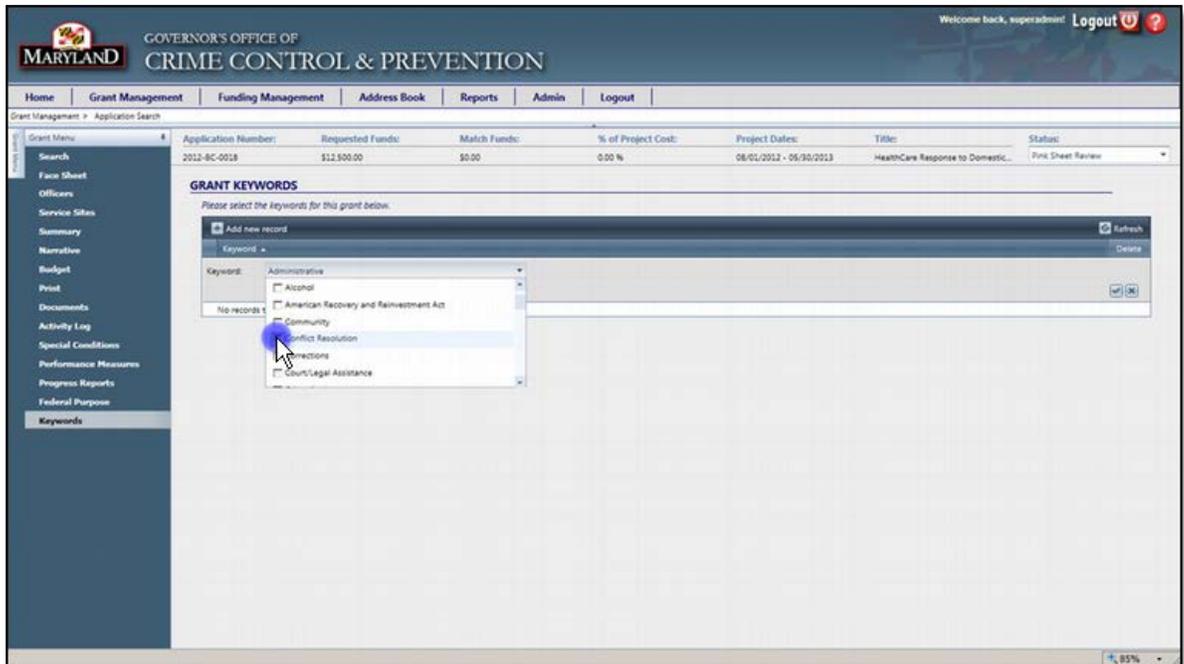


Figure 201 - Add Keywords to a Grant Application

2. Click on Add New Record
3. Click the Keywords drop-down list and select one or more keywords by clicking to place a checkmark in the box beside the keyword(s) – select all that apply.
4. When you've selected the Keywords, click on the checkmark icon to SAVE your keywords.

After you've successfully added programmatic reporting requirements and keywords to the grant application, you can proceed to the next phase, which is the Grants Manager Review.

#### 7.5.3.6 Assign Funding Year and GOCCP Grant Roles on Face Sheet

Based on permissions, complete the Face Sheet by selecting the Funding Year and assigning the following GOCCP Grant Roles:

- Regional Monitor
- Funding Manager
- Fiscal Specialist

**GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION**

Home Grant Management Funding Management Address Book Reports Admin Logout

Grant Management > Application Search

App. Number: 2012-BI-0018 Grant Number: Req. Funds: \$13,388.00 Match Funds: \$0.00 Match %: 0.00 % Project Dates: 09/01/2012 - 12/31/2012 Title: Technology Improvement Application Status: Pink Sheet Review

**PROJECT TITLE**  
Project Title: Technology Improvement

**APPLICANT AGENCY**  
City of Brunswick  
Is service site?   
Address: 1 West Potomac Street  
City, State Zip: Brunswick, MD 21716  
Org. Type: Local Government  
County: Frederick  
Auth. Official: Carroll Jones

**IMPLEMENTING AGENCY**  
Brunswick Police Department  
Is service site?   
Address: 20 A Street  
City, State Zip: Brunswick, MD 21716  
Org. Type: Local Government  
County: Frederick  
Auth. Official: Milton French

**COUNTY/MUNICIPALITY**  
County: Frederick  
Municipality: Brunswick

**GRANT ROLES**  
Project Director: Bryan Brown  
Fiscal Officer: Kimberly Cummitts  
GOCCP Regional Monitor: Rajala, Laurie  
GOCCP Funding Manager: Lovitt, Tammy  
GOCCP Fiscal Specialist: Muboura, Virginia

**PROJECT DATES**  
GFD Code: BIAG  
GFD Title: Byrne - Justice Assistance Grant (JAG) Program - 2012  
GFD Start Date: 10/1/2011  
GFD End Date: 9/30/2015  
Proposed Start Date: 9/2/2012  
Proposed End Date: 12/31/2012

**FUNDING YEAR**  
Program Year: List

**COPY RECEIVED DATE**  
Copy Received: 6/11/2012

**APPLICATION DATES**  
Application Submitted: 5/14/2012  
Submitted to Financial:

**PREPARER INFORMATION**  
Preparer's Name: Lt. Bryan C. Brown  
Preparer's Phone: (301) 834-9101

**DEFICIENCY STATUS**  
Deficiency:   
Agency Note:

Figure 202 – Assign GOCCP Grant Roles and Select Funding Year

### 7.5.4 Enter Goals and Objectives for a Grant Application

1. Click on Goals/Objectives in the Grant Menu.
2. Enter the goals/objectives text in the process area then click the Save button.

**GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION**

Home Grant Management Funding Management Address Book Reports Admin Logout

Grant Management > Award Search

Grant Number: [Unassigned] Awarded: \$12,900.00 Award Reported %: 0.00 % Match: \$0.00 Match Reported %: 0.00 % Project Dates: 08/01/2012 - 08/30/2013 Title: HealthCare Response to Do... Status: New Grant

**GOALS AND OBJECTIVES**  
Enter the goals and objectives for this grant.

(Example) local shelter is seeking funding to prepare an awareness and prevention campaign. The shelter provides services to all adult domestic abuse victims. Since the shelter was formed in 2001, we have assisted over 2000 victims of domestic abuse. These numbers clearly reflect the need to provide awareness and prevention education throughout the community.

Words: 54 Characters: 354

Figure 203 - Add Goals & Objectives to Grant Award

## 7.5.5 Submit a Grant Application to the Grants Manager

An application submitted to the Grants Manager has been completely reviewed and approved for funding.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting “Pink Sheet Review” from the Status drop-down list, as this will be the status of any application ready for the Grants Manager Review/Award process.

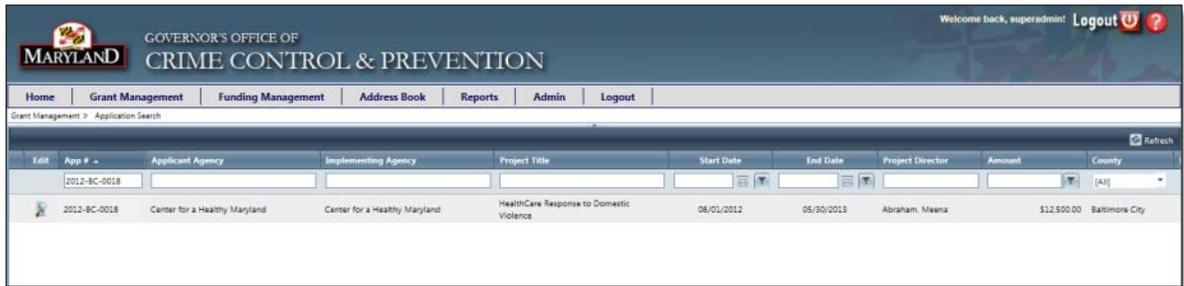


Figure 204 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.
3. Click the Status drop-down list and select “Submit to Grants Manager”.
4. (Internal Business Process) Physically deliver the packet to the Grants Manager. The packet must contain the following (in the order listed below):
  - a. Application Processing & Certification Form
  - b. Application Processing Checklist (Pink Sheet)
  - c. Application (Face Sheet on top)
  - d. All Peer/Internal Review Documents

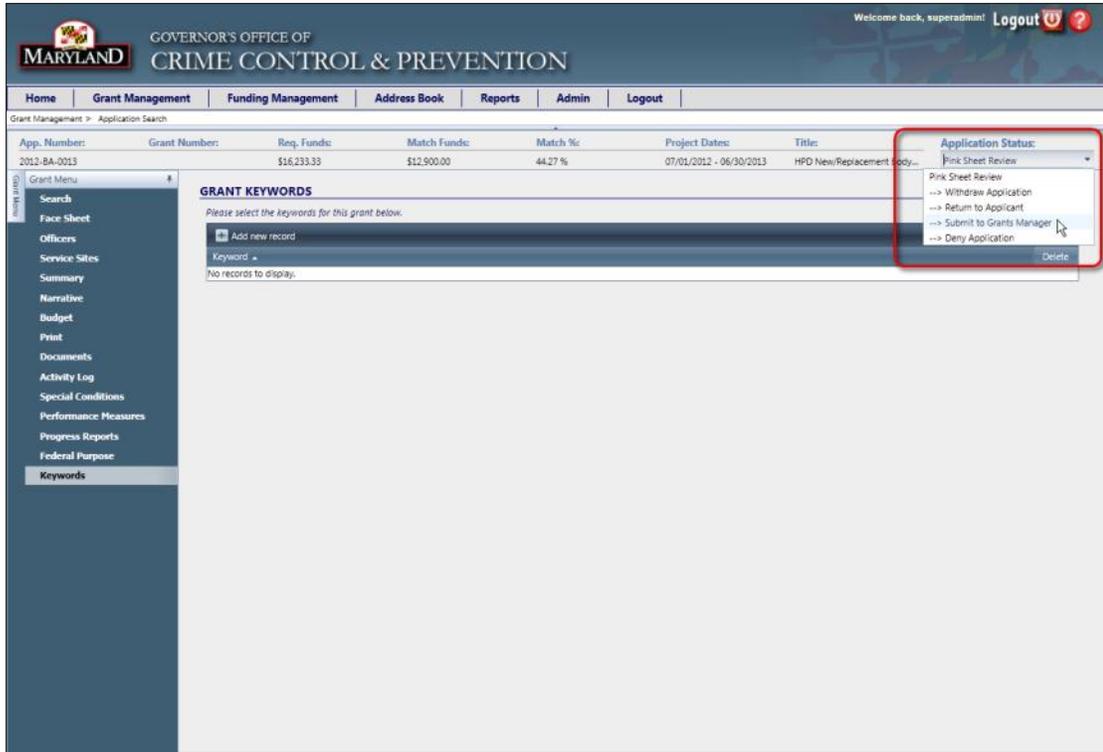


Figure 205 - Submit Grant Application to Grants Manager for Review

- The Status will change to Pending Award
5. The Grants Manager can now Award the application, after a final review of the Face Sheet and all other data associated with the Grant Application.

## 7.6 Grants Manager Awarding Process (Based on Permissions)

### 7.6.1 Award a Grant Application

When a grant application has passed successfully through the Grants Manager Review process, the final step is to award the grant in GMS.

1. Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter. You can narrow the list down by selecting "Pending Award" from the Status drop-down list, as this will be the status of any application ready for the Awarding process.



Figure 206 - Search for Grant Application

2. Click the Edit icon beside the application record to bring up the Grant Application Menu.
3. Click the Status drop-down list and select "Award Application".

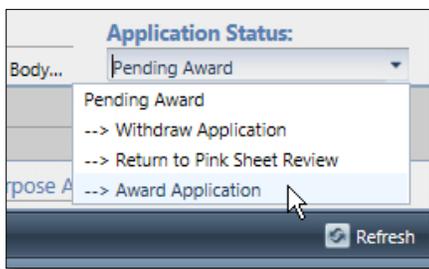


Figure 207 - Click Award Application

4. The sub-recipient will not see the new grant award in their Grant Awards dashboard until the Grant Award Award Packets have been printed and the Grant Award is in Acceptance Documents Due status.

When a grant application has first been awarded in GMS, a Grant Award is created which is linked within the system to the application.

After awarding an application, the system will return you to the Application Search Grid. You may continue to award applications using the steps outlined above, or you may proceed with the next steps in the grant award processing phase.

To continue with the grant award processing phase, navigate to the award for the grant via Grant Management > Award Search (refer to Section [Searching for a Grant Award](#) for further instructions).



Search using the application number or project title. Once located, click on the edit icon in the search grid to view the details of the award.

Please refer to the section [Sorting, Filtering, and Searching for Records](#) for help with finding a grant award.

## 7.6.2 Assign Funding Sources to a Grant Award (Based on Permissions)

1. Click on Funding in the Grant Menu.
2. Click and hold on the funding source in the Available Distribution Details panel.
3. Drag the source over to the Selected Distribution Details panel.

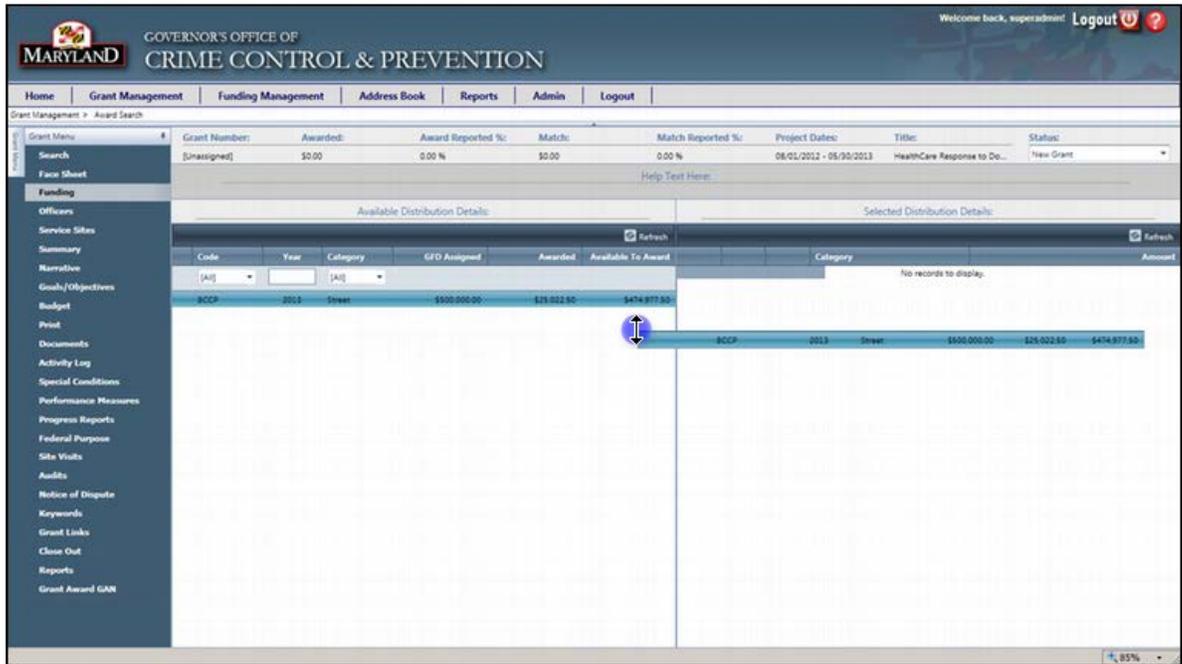


Figure 208 - Allocate Funding to a Grant Award

4. Enter the grant budget amount in the popup text box. This amount should match the value of the Awarded field in the Grant Award header panel in the figure above.

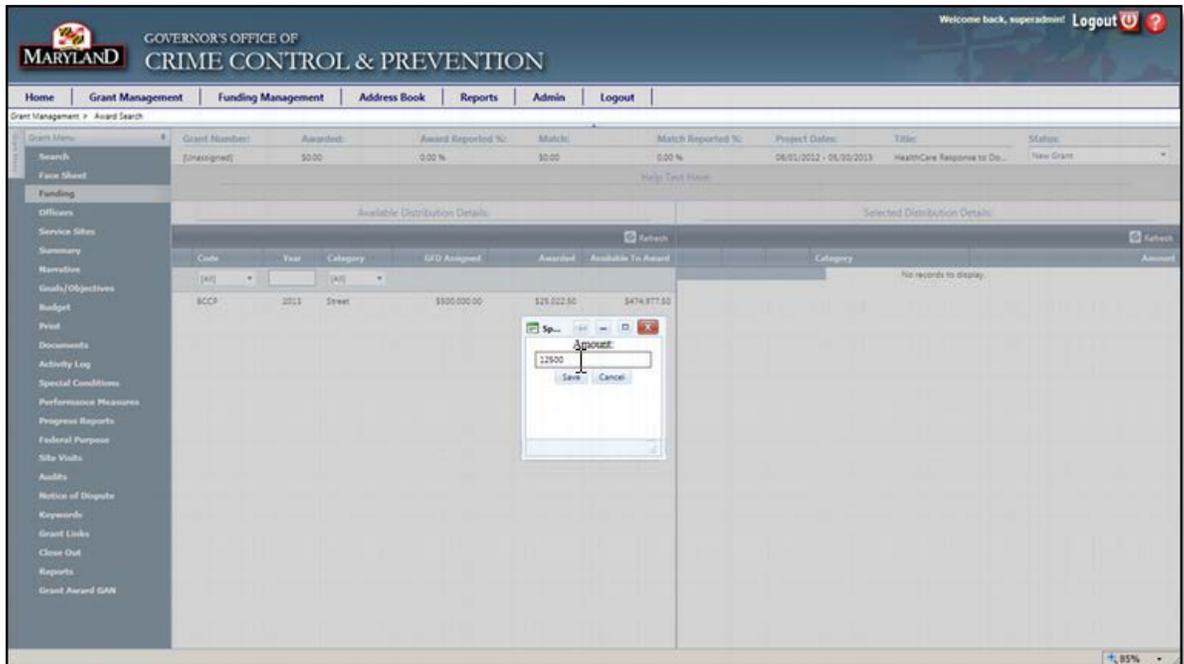


Figure 209 - Enter Allocation Amount for Grant Award

5. The funds distribution is now displayed in the Selected Distribution Details panel.

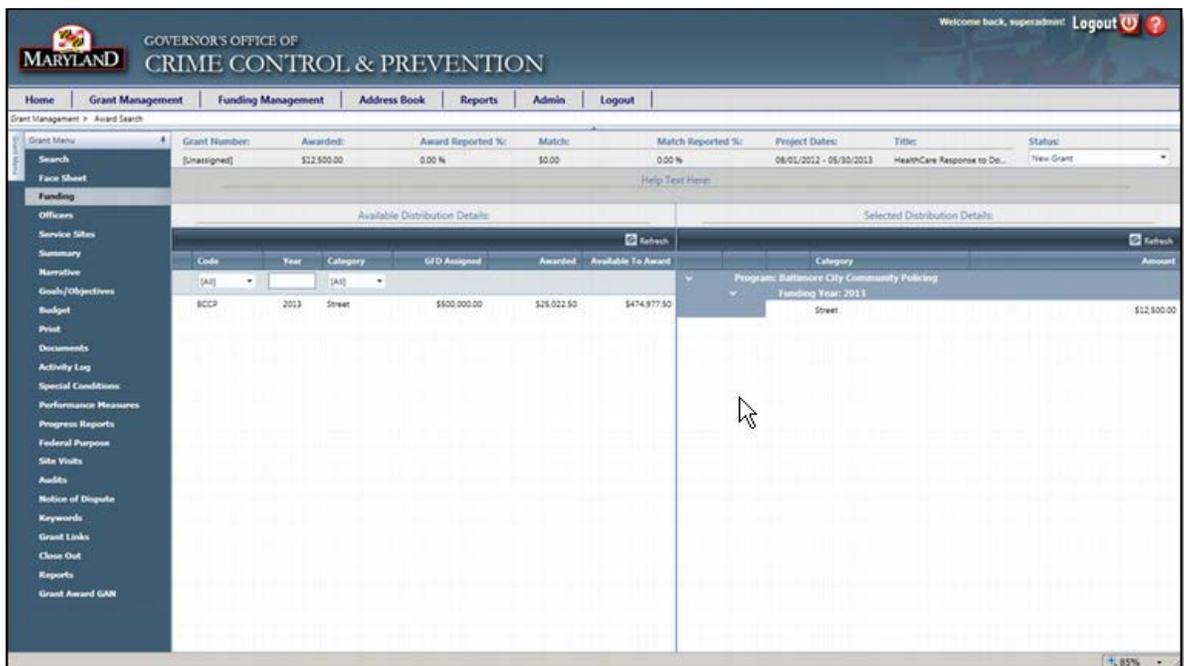


Figure 210 - Verify Funding Allocation Selection

### 7.6.3 Link Grant Awards (done by the Grants Manager immediately after Assigning Funding)

1. Click on Grant Links in the Grant Menu.
2. Click and hold on the grant you wish to link from the Available Grants panel.

3. Drag the item to the Selected Grants panel and release the mouse button.

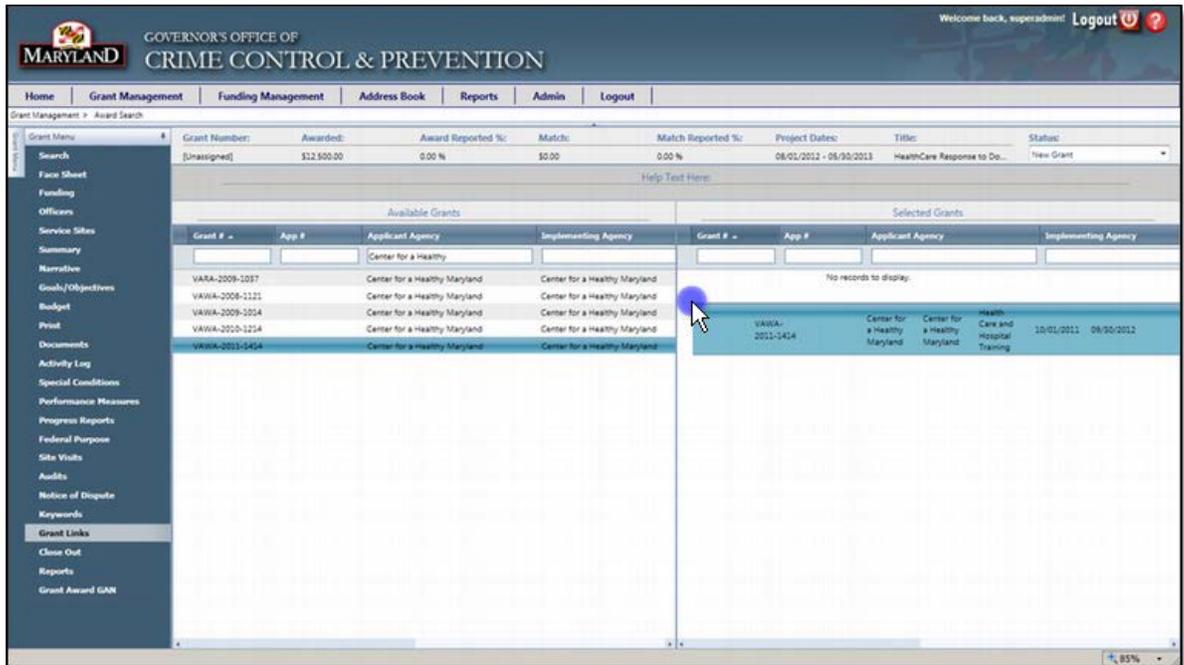


Figure 211 - Link Grant Awards

4. Click the Status drop-down list and select Funding Assigned.

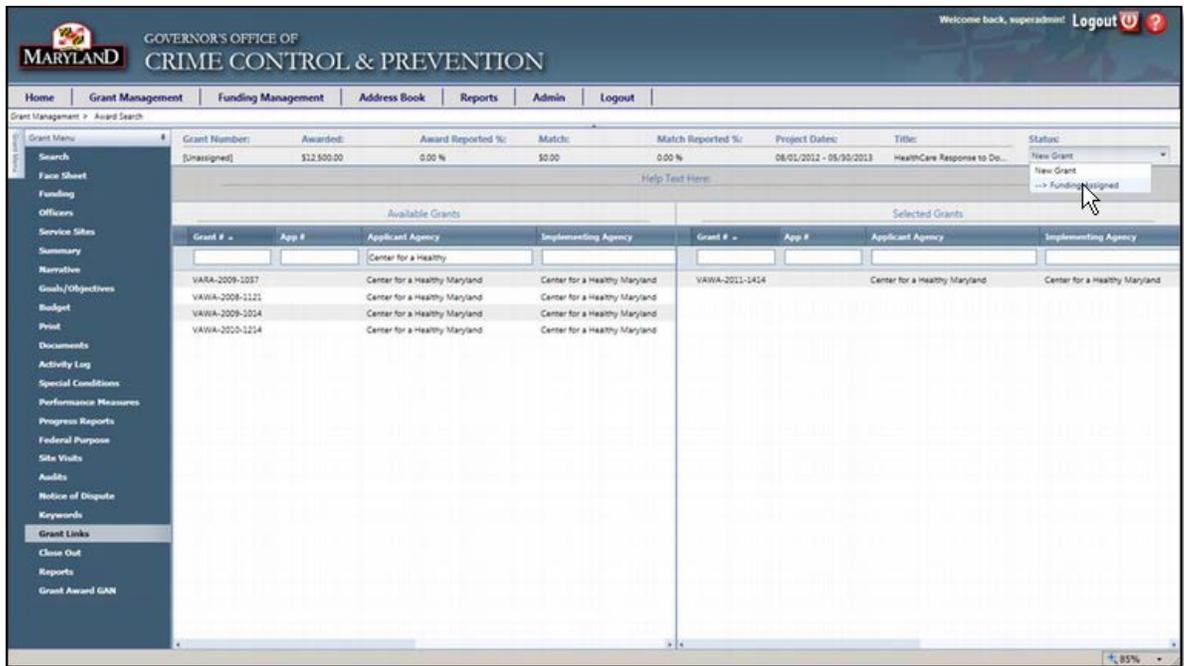


Figure 212 - Select Funding Assigned

5. The Status of the award is changed to Award Packets Pending: (at this point the Grants Manager gives the awarded application to the Control Desk to print the award packets)

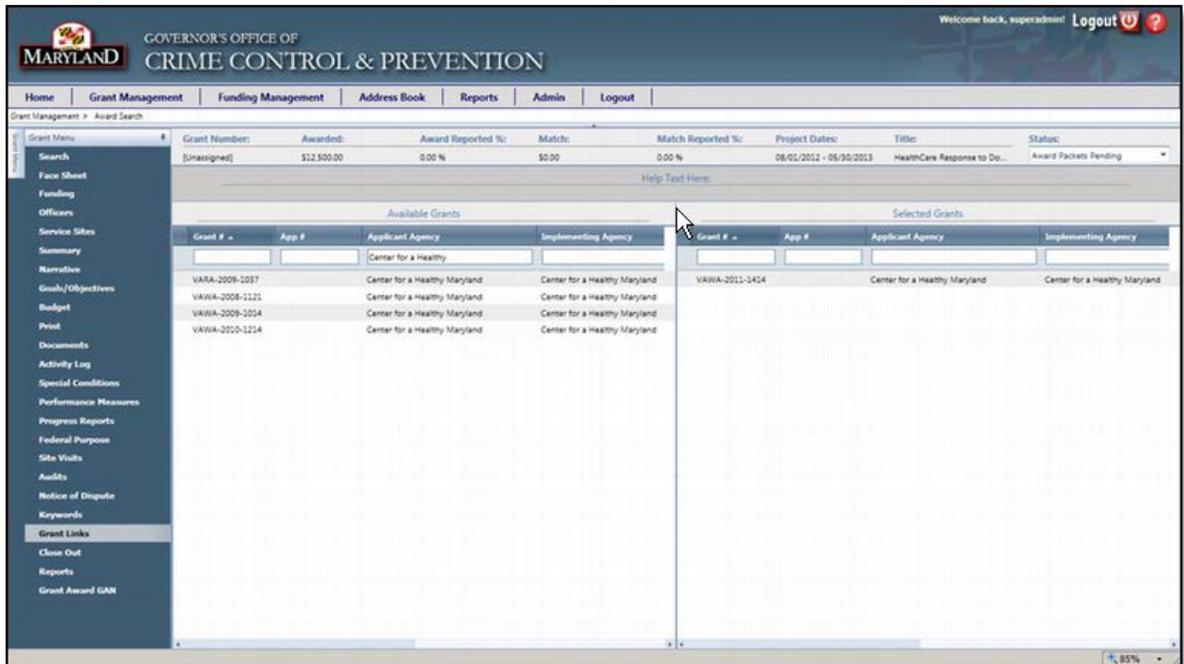


Figure 213 - Award Packet Pending Status Update

- After the grant award packets have been printed, click on the status drop-down list and select Print Packets.

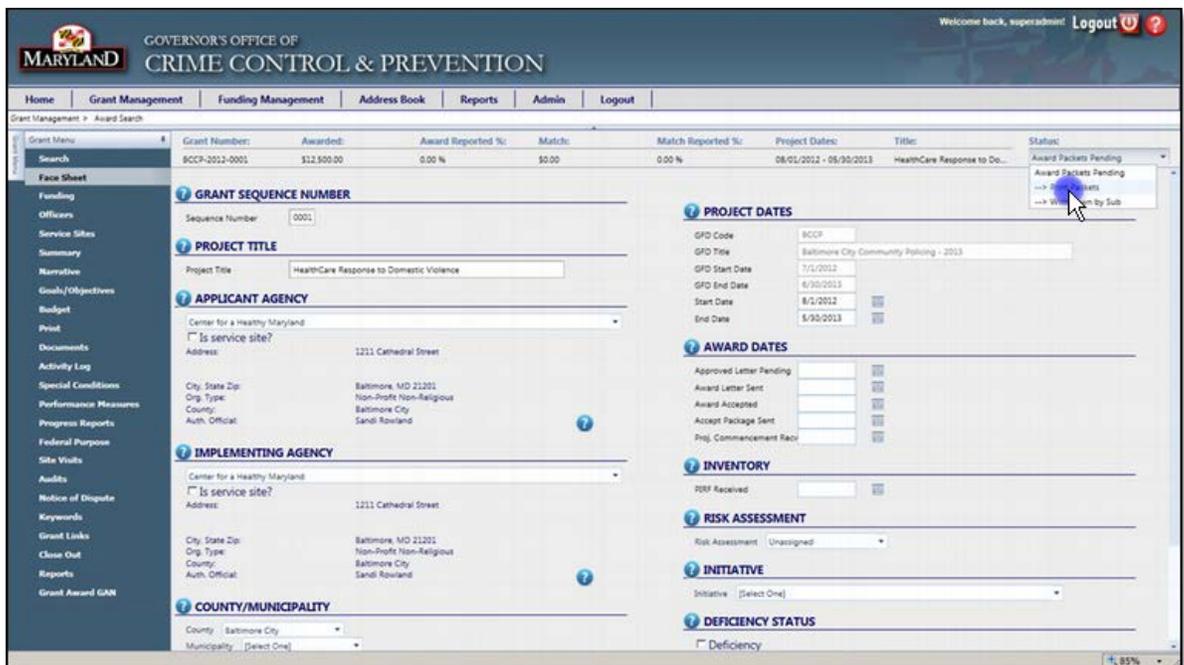


Figure 214 - Change Status to Print Packets for Internal Review

- The status changes to Award Packets Review (printed award packets are compiled and sent for quality review by specific staff listed on the Quality Review sheet):

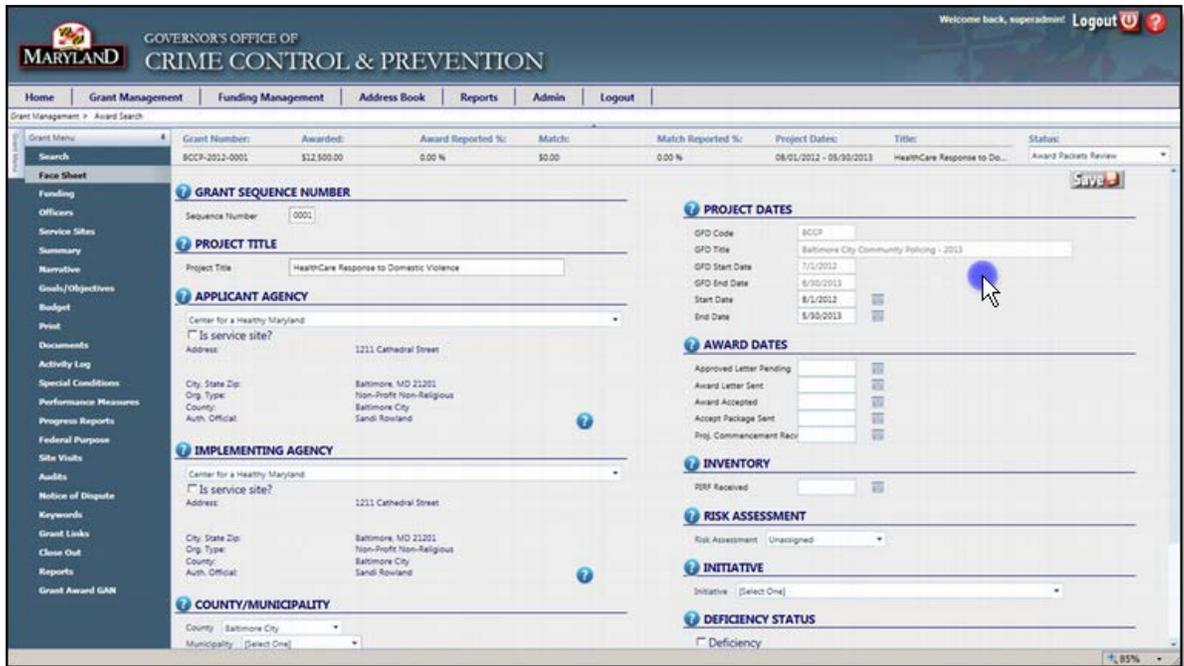


Figure 215 - Award Packet Review Status

- When the award packet has completed the Quality Review it is returned to the Control Desk. The Control Desk Administrator changes the status of the award to Mail Award Packets.

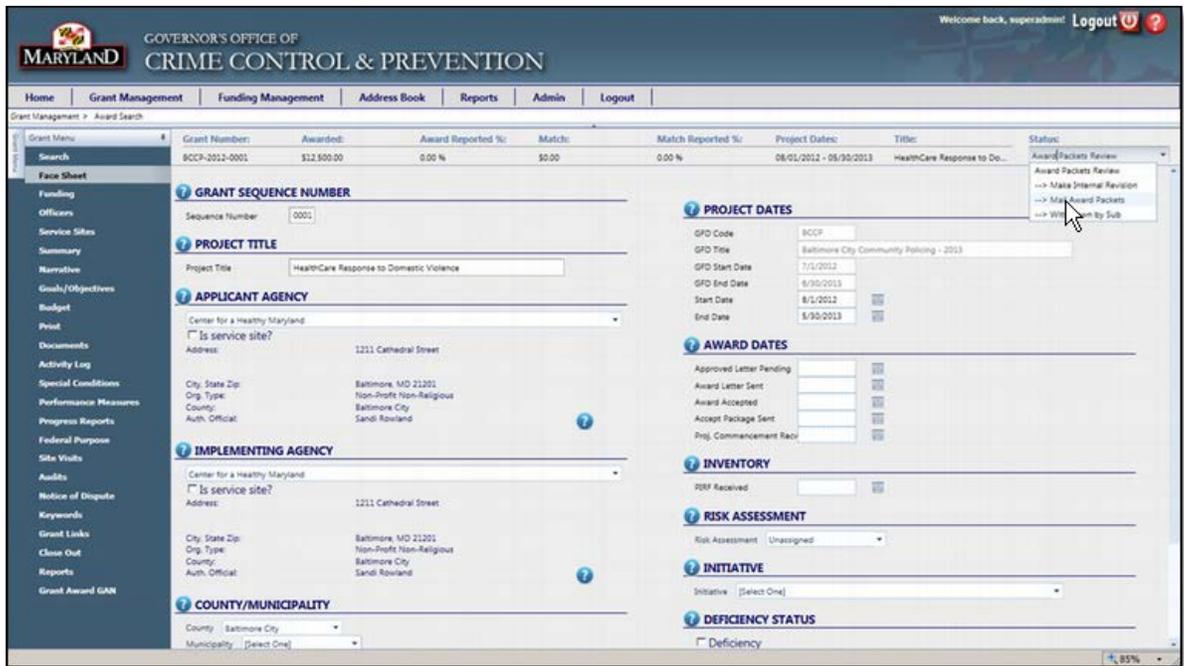


Figure 216 - Mail Award Packets

- The status changes to Acceptance Documents Due.

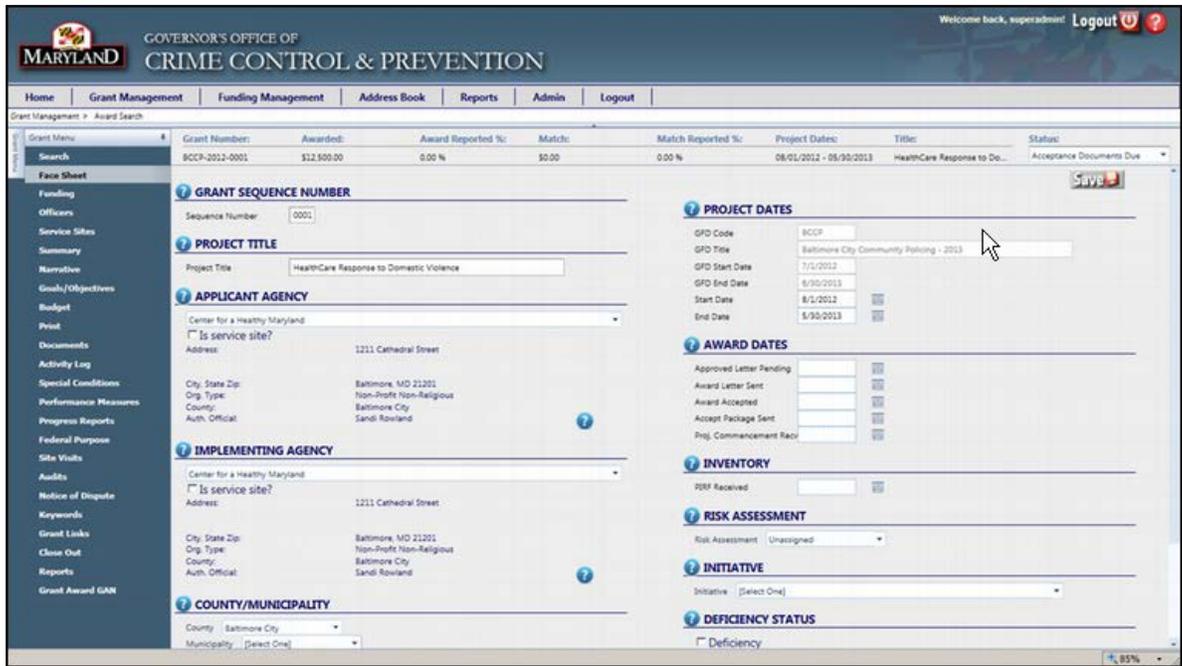


Figure 217 - Acceptance Documents Due Status

10. When the sub-recipient returns the signed Award Acceptance and Project Commencement, the Control Desk Administrator will log this information by completing the Award Dates fields and clicking SAVE, then changing the status to “Acceptance Documents Received”.

- Note: The Award Accepted and Project Commencement Received dates must be entered in order to change the status to “Acceptance Documents Received”.

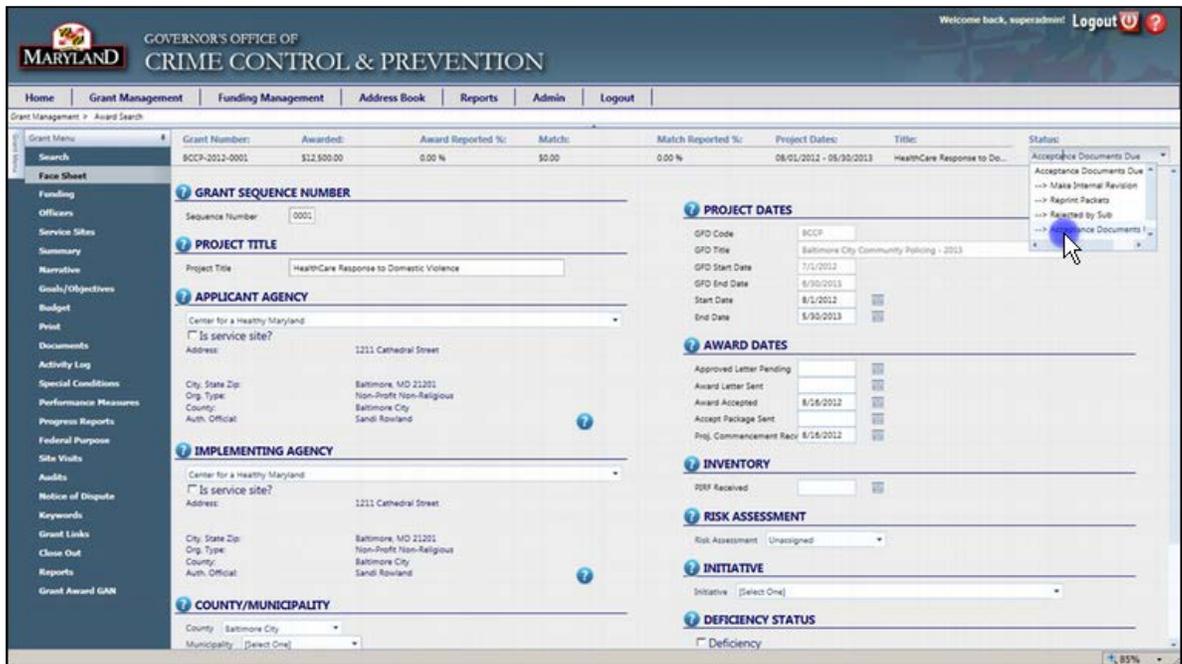


Figure 218 - Change Status to Acceptance Documents Received

- The new award is now in compliance.

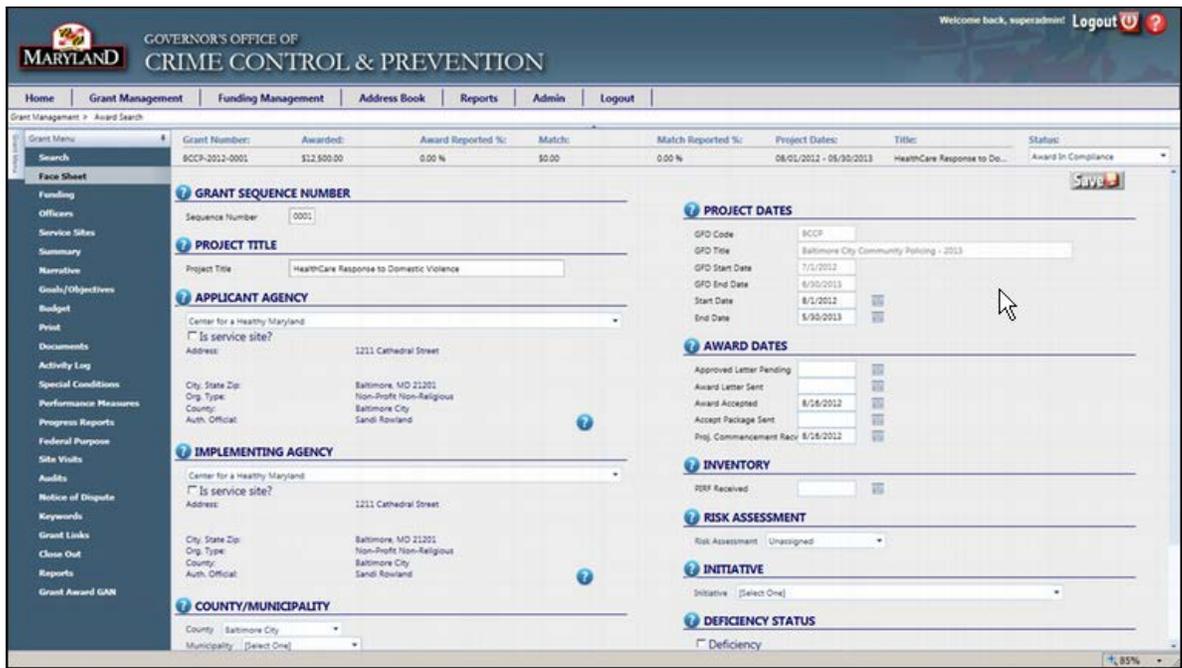


Figure 219 - Award in Compliance

## 7.6.4 Deny a Grant Application

If the decision is made to deny the grant application, Program staff will forward the required paperwork to the Grants Manager. The following is required: “Application – Denied Funding” form, a copy of the denial letter (from the Executive Director), the original application, and all other review paperwork. The Grants Manager will change the application status to “Deny Application”.

- Search for the application in the Application Search module by entering the Application Number on the hardcopy into the App# field and pressing Enter.



Figure 220 - Search for Grant Application

- Click the Edit icon beside the application record to bring up the Grant Application Menu.
- To deny the application, change the Status of the application to “Deny Application”.



Figure 221 - Change Application Status to Deny Application

The status of the application will change to “Application Denied”.

## 7.7 Searching for a Grant Award

If a grant award you are searching for is not displayed in your Awards dashboard on the GMS Home Page, you can see a full listing of awards by accessing the Award Search screen from the Grant Management menu:



Figure 222 - Access Grant Management -> Award Search

The Award Search screen is displayed. It contains more fields than the Awards dashboard, and allows you to view awards with all statuses.

Grant #	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Project Director	Amount	County	Misc	Status
ASP-2000-0006	2003-AS-0006	St. Mary's County Public Schools	St. Mary's County Public Schools	Safe and Smart Together Club	08/01/1999	08/30/2000	Smith, Mark	\$30,000.00	St. Mary's	Alexander, Andrea	Award Closed
ASP-2000-0007	2003-AS-0007	Boys & Girls Clubs of Washington County, Inc.	Boys & Girls Clubs of Washington County, Inc.	Boys & Girls Club After School Program - Pennsylvania Avenue	08/01/1999	06/30/2000	Browning, Buck	\$30,000.00	Washington	Alexander, Andrea	Award Closed
ASP-2000-0008	2003-AS-0008	Family Services Agency, Inc.	Family Services Agency, Inc.	Parents in Caring	08/01/1999	06/30/2000	Jones, Sally	\$30,000.00	Montgomery	Alexander, Andrea	Award Closed
ASP-2000-0009	2003-AS-0009	Catholic Charities of the Archdiocese of Washington DC	Family Services Agency, Inc.	Woodland Springs After-school Program	08/01/1999	06/30/2000	Hart, Thomas	\$24,840.36	Montgomery	Alexander, Andrea	Award Closed
ASP-2000-0010	2003-AS-0010	Baltimore City Dept. of Recreation and Parks-Mount Royal	Baltimore City Dept. of Recreation and Parks-Mount Royal	Mt. Royal Latchkey After School Program	08/01/1999	12/31/2000	McLendon, Janella	\$24,900.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0011	2003-AS-0011	Baltimore City Dept. of Recreation and Parks-Cani	Baltimore City Dept. of Recreation and Parks-Cani	Cani Performing Arts Latchkey Program	08/01/1999	08/31/2000	McLendon, Janella	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0012	2003-AS-0012	Maryland Center for Youth and Family Development, Inc.	Maryland Center for Youth and Family Development, Inc.	"Stars" After School Program	08/01/1999	03/31/2000	Mason, Christy	\$15,507.96	Prince Georges	Alexander, Andrea	Award Closed
ASP-2000-0013	2003-AS-0013	Worcester County Health Department	Worcester County Health Department	Discover After School Program	08/01/1999	06/30/2000	Putzy, Mary	\$30,000.00	Worcester	Alexander, Andrea	Award Closed
ASP-2000-0014	2003-AS-0014	Mount Calvary African Methodist Episcopal Church	Mount Calvary African Methodist Episcopal Church	Mount Calvary Tower's BEST After School Program	08/01/1999	08/30/2000	Lighthouse, Ann	\$28,606.39	Baltimore County	Alexander, Andrea	Award Closed
ASP-2000-0015	2003-AS-0015	Immanuel Temple AME Church	Immanuel Temple AME Church	Empowering the Seed	08/01/1999	06/30/2000	Walt, Peggy	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0016	2003-AS-0016	Boys & Girls Clubs of Greater Washington-Montgomery	Boys & Girls Clubs of Greater Washington-Montgomery	Boys & Girls Club Education/Social Development Initiative	08/01/1999	08/30/2000	Blirt, James	\$28,463.47	Montgomery	Alexander, Andrea	Award Closed
ASP-2000-0017	2003-AS-0017	Somerset County Health Department	Somerset County Health Department	Greenwood After School Program	08/01/1999	06/30/2000	Larkford, Gal	\$30,000.00	Somerset	Alexander, Andrea	Award Closed
ASP-2000-0018	2003-AS-0018	Sheppard Pratt Health System, Inc.	Sheppard Pratt Health System, Inc.	Sheppard Pratt PROUD Program - Germantown	08/01/1999	06/30/2000	Mayer, Cassen	\$30,000.00	Montgomery	Alexander, Andrea	Award Closed
ASP-2000-0019	2003-AS-0019	Sheppard Pratt Health System, Inc.	Sheppard Pratt Health System, Inc.	Sheppard Pratt PROUD Program - Walter & Millicent Elementary School	08/01/1999	06/30/2000	Mayer, Cassen	\$29,999.00	Anne Arundel	Alexander, Andrea	Award Closed
ASP-2000-0020	2003-AS-0020	Associated Catholic Charities, Archdiocese of Baltimore	Associated Catholic Charities, Archdiocese of Baltimore	Catholic Charities After-school Program	08/01/1999	08/30/2000	Moses, Janai	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0021	2003-AS-0021	Kathonia Baptist Church	Kathonia Baptist Church	Project Save Haven	08/01/1999	06/30/2000	Miles, Douglas	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0022	2003-AS-0022	New Mark of Excellence School, Inc.	New Mark of Excellence School, Inc.	Rap Around Children's Education	08/01/1999	06/30/2000	Davis, Beverly	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0023	2003-AS-0023	Children's Guild, Inc., The	Children's Guild, Inc., The	The Children's Guild After School Enrichment Program	08/01/1999	06/30/2000	Wilson-Dooan, Terry	\$30,000.00	Baltimore County	Alexander, Andrea	Award Closed
ASP-2000-0024	2003-AS-0024	Woodbourne Center, Inc.	Woodbourne Center, Inc.	Achieves After School	01/01/2002	06/30/2002	Frierson, Jacqueline	\$7,500.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0025	2003-AS-0025	Academy of Success, Inc.	Academy of Success, Inc.	The Pathfinders Club	08/01/1999	09/30/2000	Bratton, Joel	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0027	2003-AS-0027	St. Vincent de Paul of Baltimore, Inc.	St. Vincent de Paul of Baltimore, Inc.	St. Antoinette Family Outreach-Center After School Program	08/01/1999	06/30/2000	Kirke, Charmaine	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed
ASP-2000-0028	2003-AS-0028	Maryland National Guard	Maryland National Guard	About Face, Northwest Middle School	08/01/1999	06/30/2000	AKBee, Lawrence	\$30,000.00	Baltimore County	Alexander, Andrea	Award Closed
ASP-2000-0029	2003-AS-0029	New Market Friends with Babies, Inc.	New Market Friends with Babies, Inc.	New Market After School Breakfast	08/01/1999	06/30/2000	McIntosh, Cynthia	\$30,000.00	Baltimore City	Alexander, Andrea	Award Closed

Figure 223 - GMS Grant Award Search Screen

Please refer to the section *Sorting, Filtering, and Searching for Records* for help with finding a grant award.

## 7.8 Maintaining Grant Awards

### 7.8.1 Define Financial Reporting Frequency (Accessibility based on permissions)

GMS Administrators can define the financial reporting frequency (monthly or quarterly) for every grant award so that financial reports and future notifications accurately reflect reporting deadlines and overdue reports.

To define financial reporting frequency for a grant award:

1. Locate the grant award and click the icon in the **Edit** column of the grant award listing. You will automatically be taken to the Face Sheet of the selected Grant Award.

Grant Number	App. Number	Category	Date
<a href="#">BJAG-2013-0026</a>	<a href="#">2015-BJ-0107</a>	License Plate Recognition Technology	10/01/2
<a href="#">BJAG-2013-1301</a>	<a href="#">2015-MS-0016</a>	CCIU Prosecutor	07/01/2
<a href="#">CACs-2016-1801</a>	<a href="#">2015-CH-0017</a>	Family Advocacy	10/01/2
<a href="#">CACs-2016-1802</a>	<a href="#">2015-CH-0001</a>	Child Advocacy Center Services	10/01/2
<a href="#">CACs-2016-1804</a>	<a href="#">2015-CH-0002</a>	Child Advocacy Center Services (Example Grant for Documentation)	11/01/2
<a href="#">CACs-2016-1805</a>	<a href="#">2015-CH-0019</a>	Victims Advocate	10/01/2

2. Or, if you are already viewing/editing a specific grant award, click **Face Sheet** in the Grant Award Menu.

Code	Year	Category	GFD As
CACS	2016	Street	\$250

3. Click the drop-down list under **Reporting Frequencies** and select **Monthly** or **Quarterly**.

**REPORTING FREQUENCIES**

Programmatic Frequency: Quarterly

Financial Frequency: [Select One] (Monthly selected)

4. Scroll to the top of the Face Sheet and click the **Save** button.



## 7.8.2 Perform Financial and Programmatic Reporting

Access the GMS programmatic reporting tools to complete and submit the regular report forms (Performance Measurements, Progress Reports, and Financial Reports) required by GOCCP for grant award compliance.

In short, programmatic reporting involves the following steps:

1. Answer, Save, and electronically Submit Performance Measure Questions
2. Print hardcopies of your work, sign, and mail to GOCCP
3. Answer, Save, and electronically Submit Progress Report Questions
4. Print hardcopies of your work, sign, and mail to GOCCP

Financial reporting involves the following steps:

1. Complete, Save, and electronically Submit Budget/Financial Report
2. Print hardcopies of your work, sign, and mail to GOCCP

### 7.8.2.1 Access the Grant Award Reporting Tools

1. Locate the grant that you want to submit reports for in the Grant Awards Dashboard and click the magnifying glass in the Edit column for this grant.

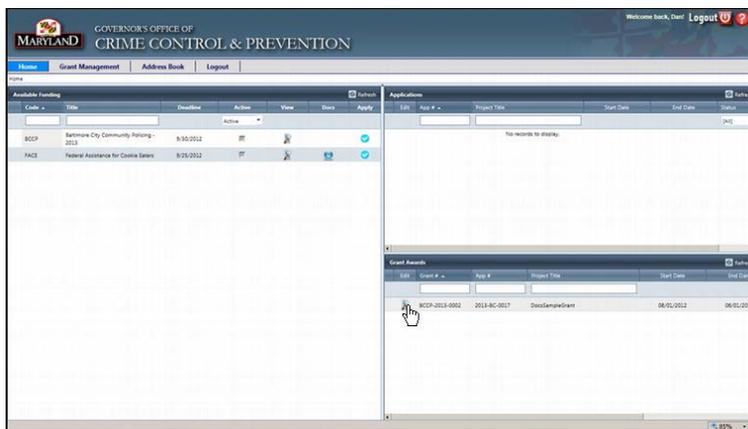


Figure 224 - Edit Grant Award

- This takes you to the Grant Award screen, which is displayed in two panels:
  - On the left is the Grant Award Menu, which displays a list of categories of information specific to the grant award you selected from my home page.
  - Clicking on any category displays detailed information about your grant pertaining to that category in the right panel of the screen.
  - By default, this screen takes you to the Face Sheet item in the Grant Award Menu.

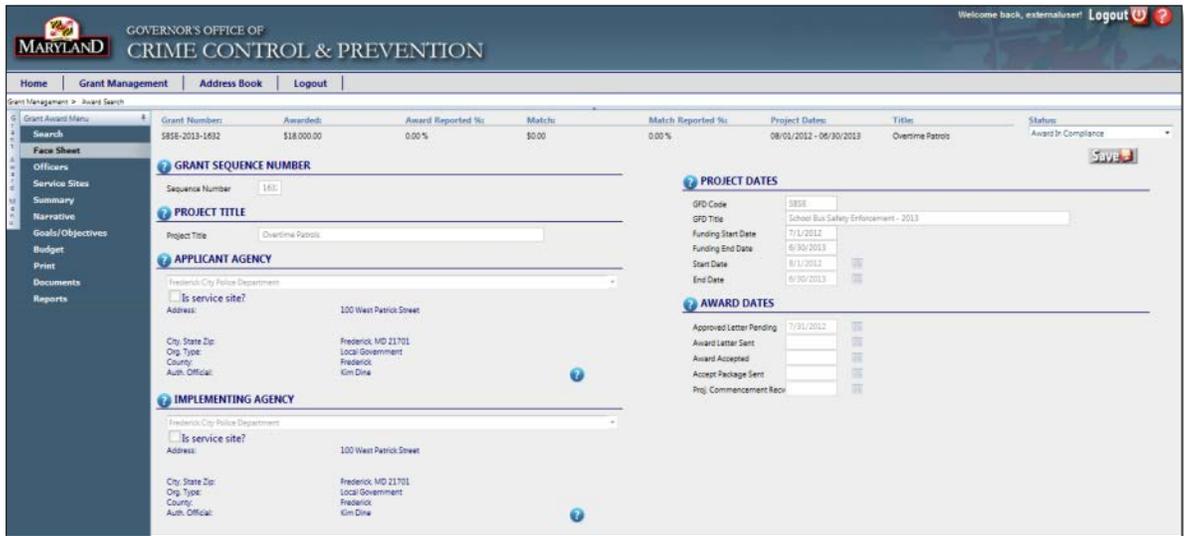


Figure 225 - Grant Award Menu and Process Area

- Click on the Reports category in the Grand Award Menu to access the programmatic reporting tools.

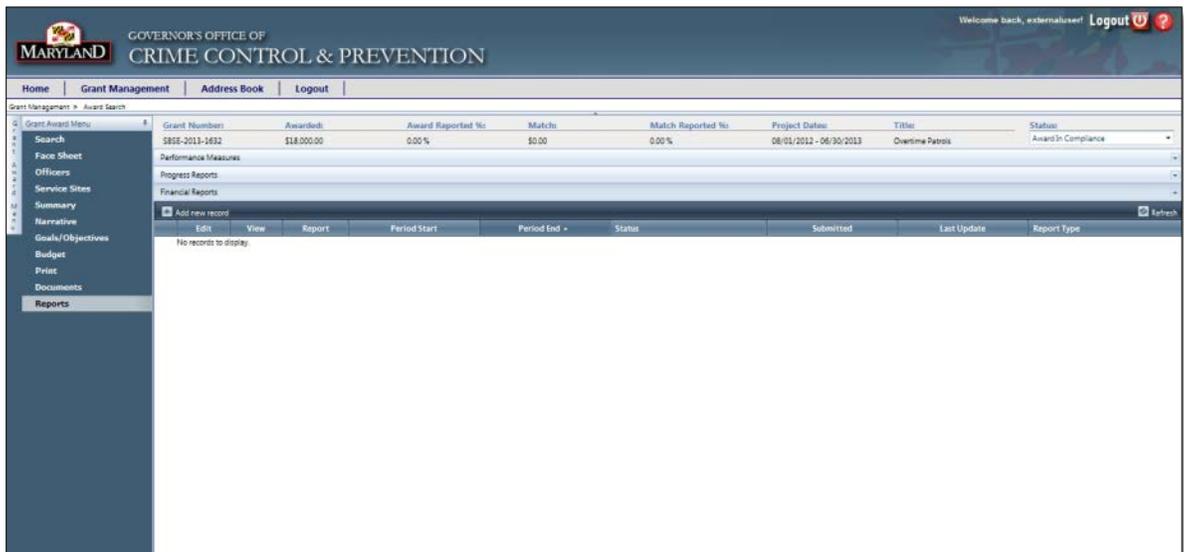


Figure 226 - Grant Award Menu - Reports Item

The types of reports you'll submit to keep your grant award in compliance are highlighted in light blue in the panel on the right. In general you'll need to submit three types of reports:

- Performance Measures
- Progress Reports
- Financial Reports.

NOTE: When performing programmatic and financial reporting, you use the Add New Record feature under each category to add new reporting entries. Once you've added a new record, if for any reason you need to delete the entry and start over by adding a new one, you can delete the record you just added by clicking the X icon in the Delete column, as shown below. You must do this prior to submitting the entry for review.

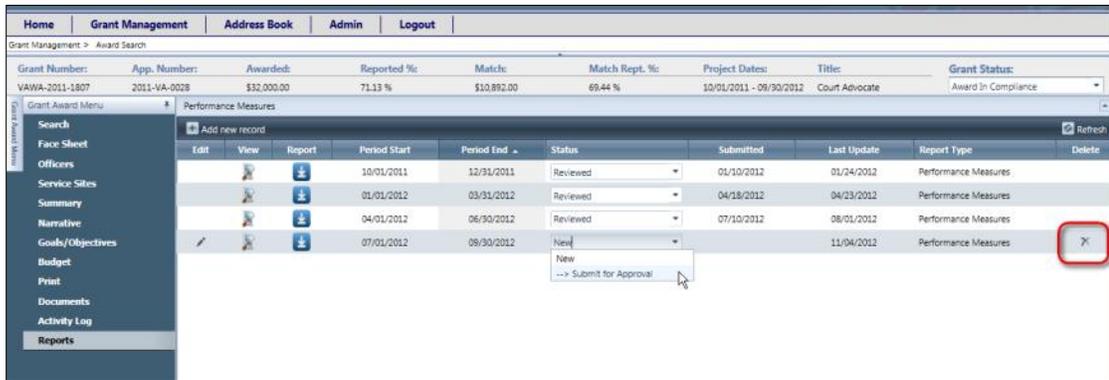


Figure 227 - Deleting a Newly Added Record (Must delete before submitting for approval)

### 7.8.2.2 Answer, Save, and Submit Performance Measure Questions

1. Click on the Performance Measures bar highlighted in light blue in the process area to expand the section.



Figure 228 - Add New Performance Measure Record

2. Click on the Add New Record icon to add a new Performance Measures record.

- The system automatically fills the period start and end date. The period start date is the first day of the first month of the quarter you're reporting. The period end date is the end date of the standard quarterly reporting period (which may be less the 3 months if the project started in the middle of one of the standard reporting periods) or the project end date, whichever is sooner.
- Click the checkmark to save the dates. Doing this adds a new record for the reporting quarter.
- Click on the Magnifying glass icon in the View column of the record you just added to view the performance measure questions.

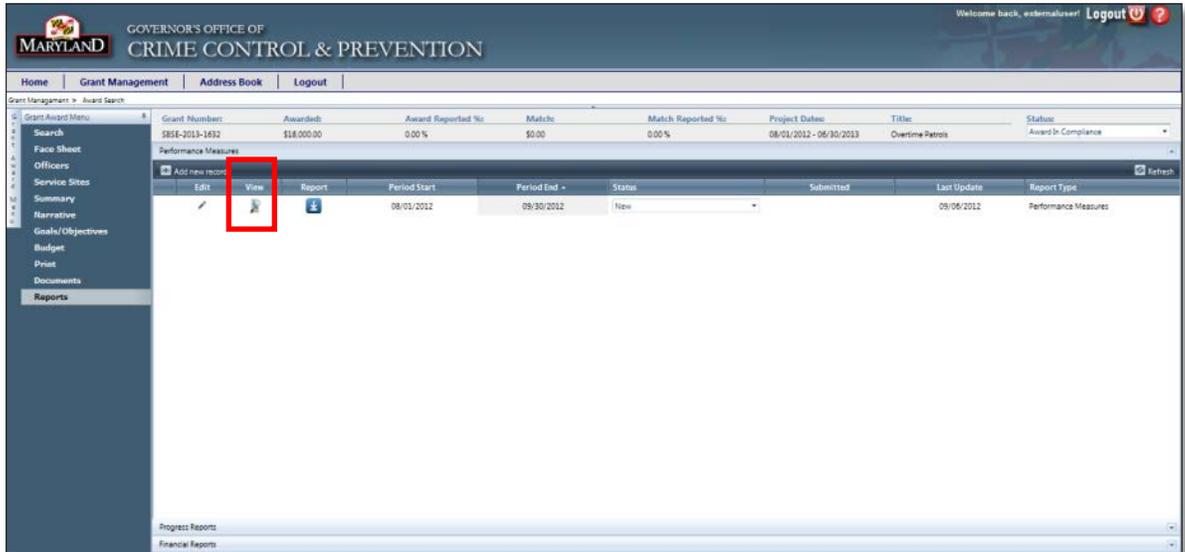


Figure 229 - View New Performance Measure Record Detail

- Provide answers to the questions, and click the Save button when you're done.

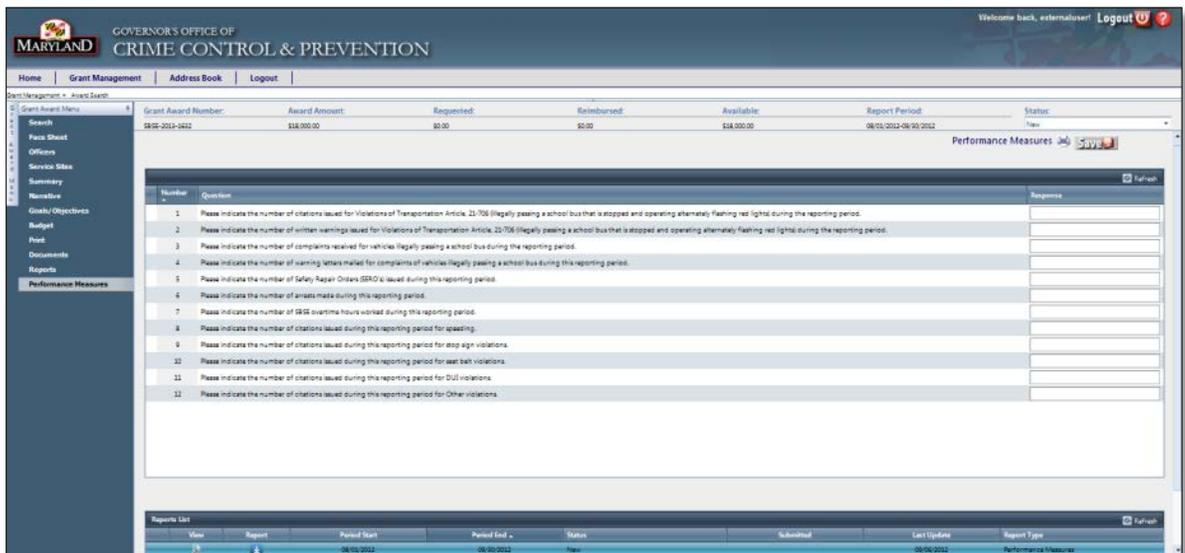


Figure 230 - Answer Performance Measure Questions

- Submit your completed quarterly Performance Measures for approval by clicking the drop-down list under the Status column and select "Submit for Approval". After doing this, the Status will change to Submitted.



Figure 231 - Submit Performance Measure Questions for Approval

### 7.8.2.3 Answer, Save, and Submit Progress Report Questions

1. Click on Reports in the Grant Award Menu to return you to the Reports process area screen.

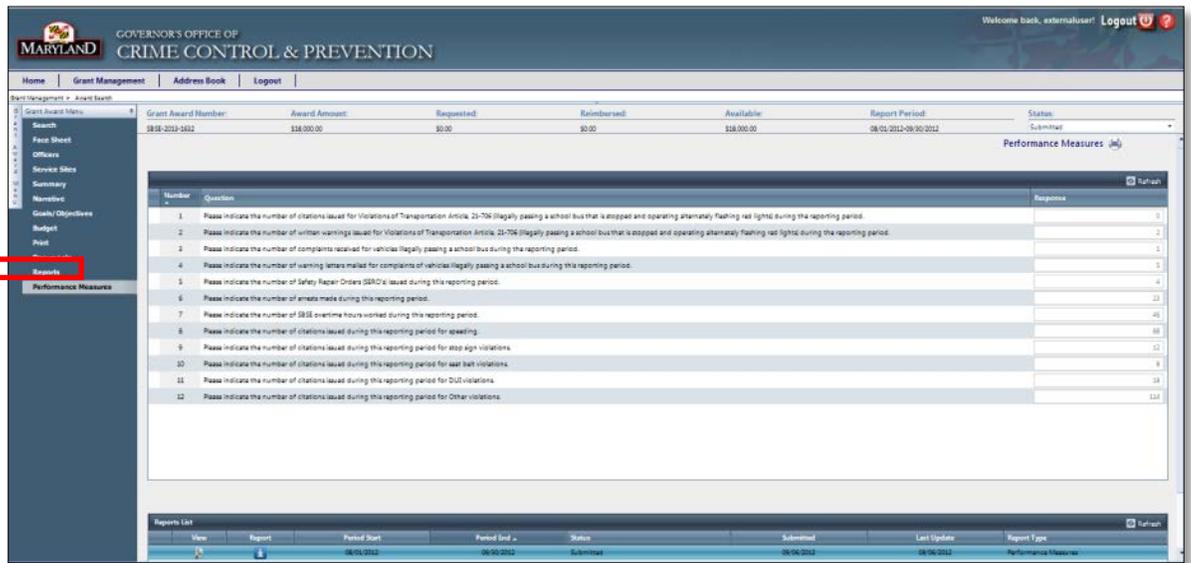


Figure 232 - Access Grant Award Menu Reports

2. Click on the Progress Report bar highlighted in light blue in the process area to expand the section.

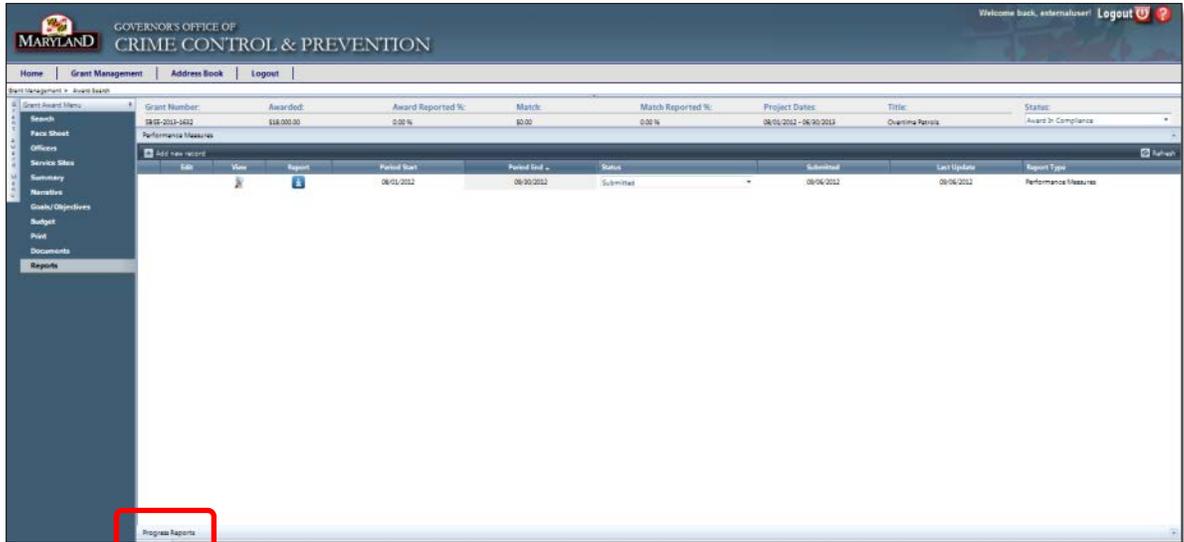


Figure 233- Click on the Progress Report bar highlighted in light blue to expand the section

3. Click on the Add New Record icon to add a new Progress Report record.
4. The system automatically fills the period start and end date. The period start date is the first day of the first month of the quarter you're reporting. The period end date is the end date of the standard quarterly reporting period (which may be less the 3 months if the project started in the middle of one of the standard reporting periods) or the project end date, whichever is sooner.
5. Click the checkmark to save the dates. Doing this adds a new record for the reporting quarter.

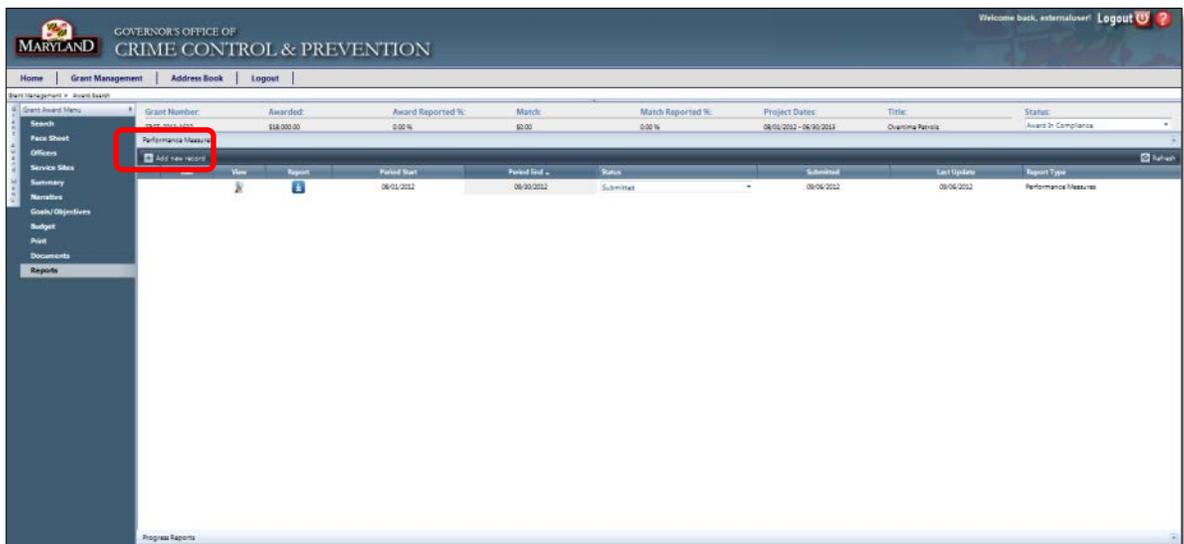


Figure 234 - Add New Progress Report Record



Figure 235-Insert a new Progress Report

- Click on the Magnifying glass icon in the View column of the record you just added to view the progress report questions.

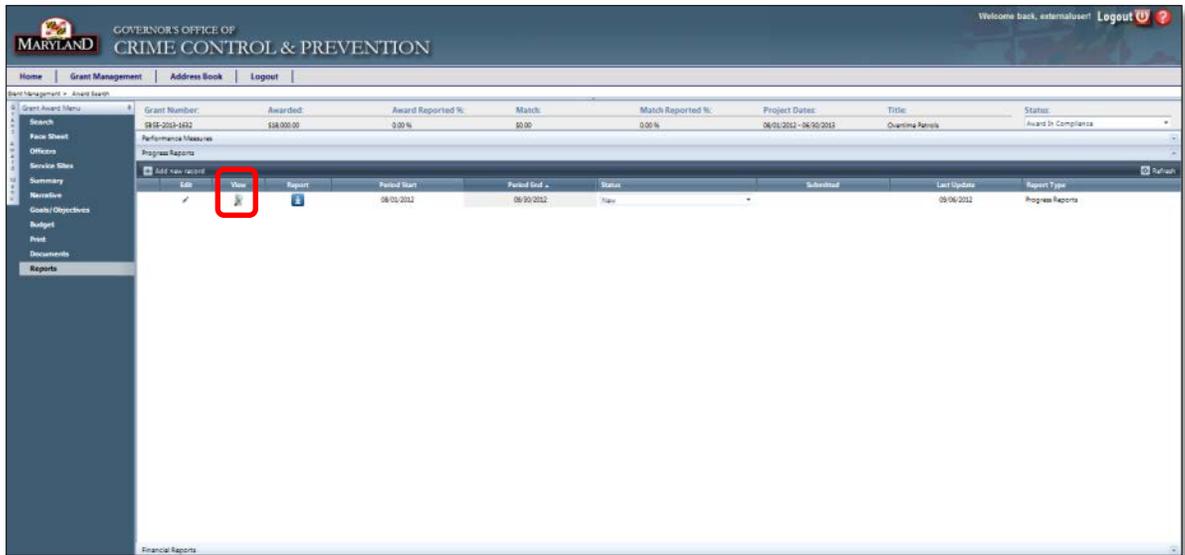


Figure 236 - Edit Progress Report Record Detail

- Provide answers to the questions, and click the Save button when you're done.

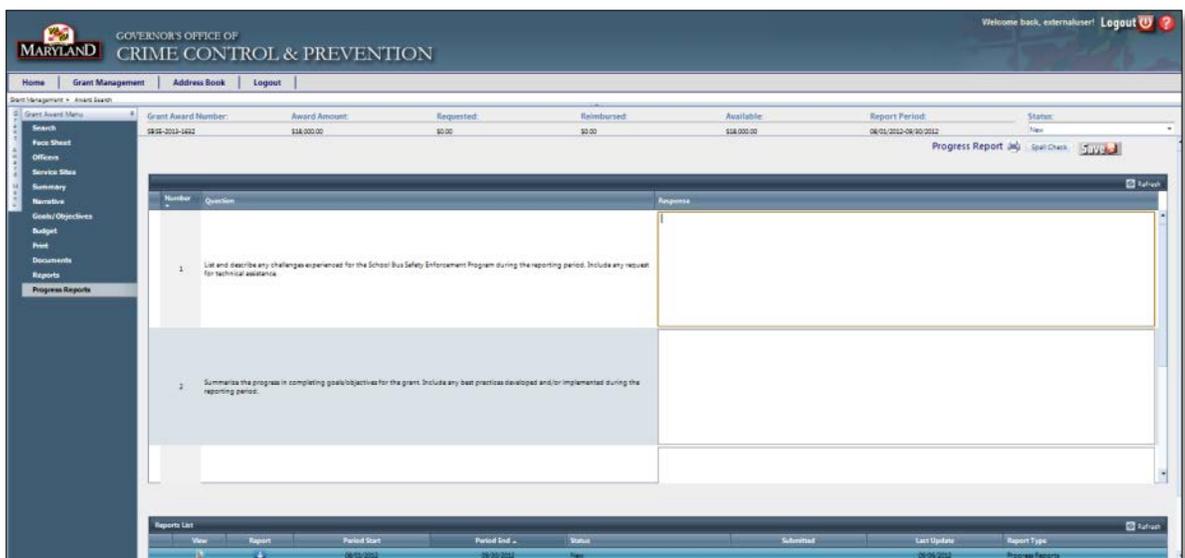


Figure 237 - Answer Progress Report Questions

- Submit your quarterly Progress Report for approval by clicking the drop-down list under the word Status and select "Submit for Approval". After doing this, the Status will change to Submitted.

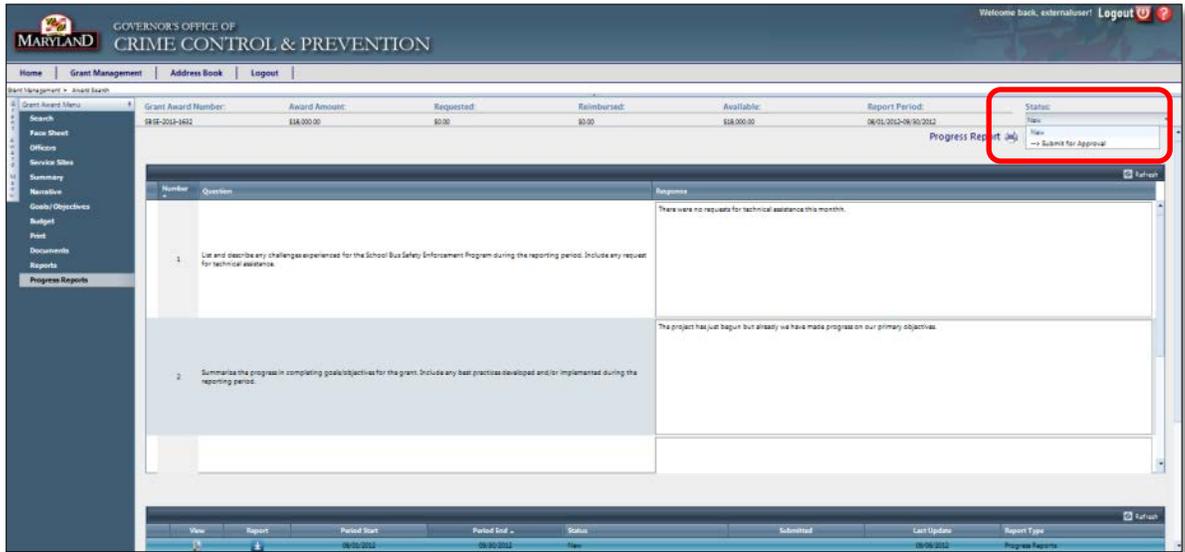


Figure 238 - Submit Progress Report Answers for Approval

#### 7.8.2.4 Complete, Save, and Submit Financial Reports

- Click on Reports in the Grant Award Menu to return you to the Reports process area screen.
- Click on the Financial Reports bar highlighted in light blue in the process area to expand the section.

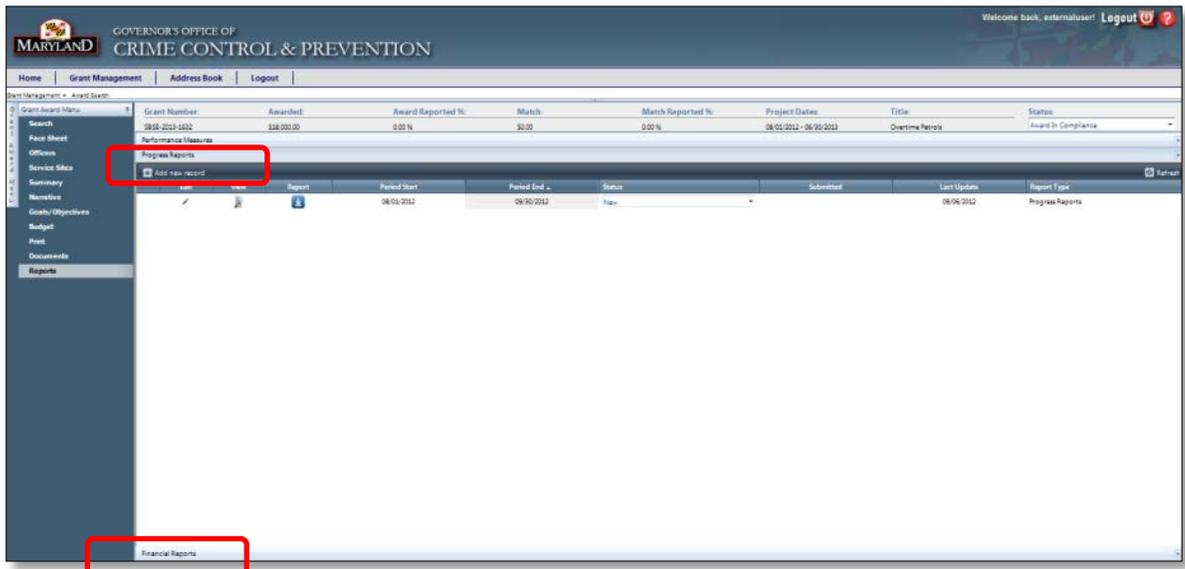


Figure 239 - Access Financial Reports Area

- Click on the Add New Record icon to add a new Financial Report record.

- The system automatically fills the period start and end date. The period start date is the first day of the first month of the quarter you're reporting. The period end date is the end date of the standard quarterly reporting period (which may be less the 3 months if the project started in the middle of one of the standard reporting periods) or the project end date, whichever is sooner.
- Click the checkmark to save the dates. Doing this adds a new record for the reporting quarter.



Figure 240-Insert new Financial Report

- Click on the Magnifying glass icon in the View column of the record you just added to view the financial reporting area.

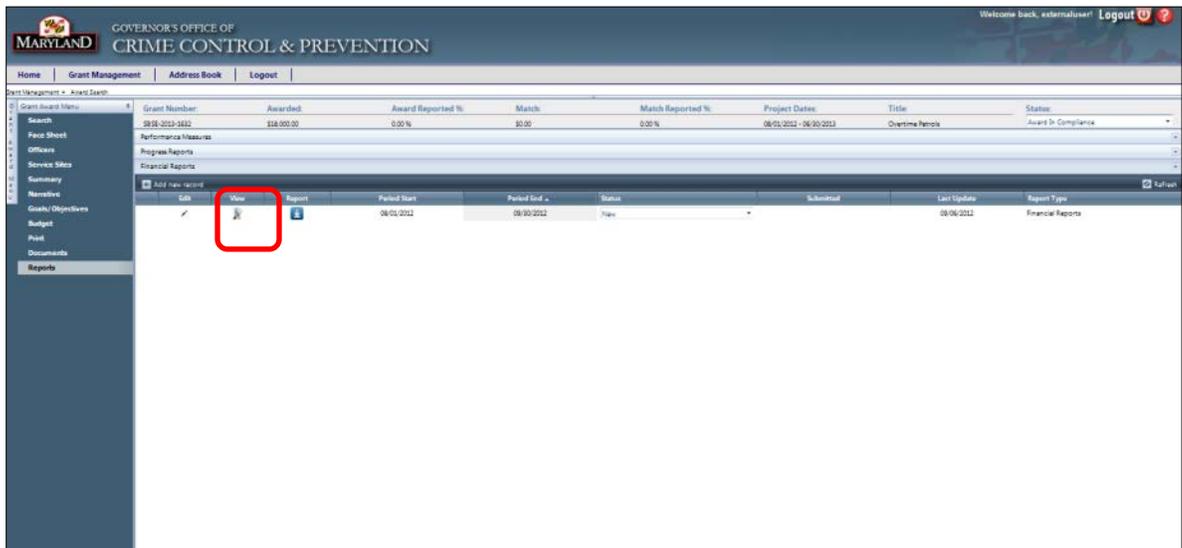


Figure 241 - Edit New Financial Reports Record

- The Grant Financial Report area is displayed and shows each budget category that was chosen when applying for your grant in a list on the left hand side. Enter your quarterly expenses into the blank text boxes next to each applicable category.

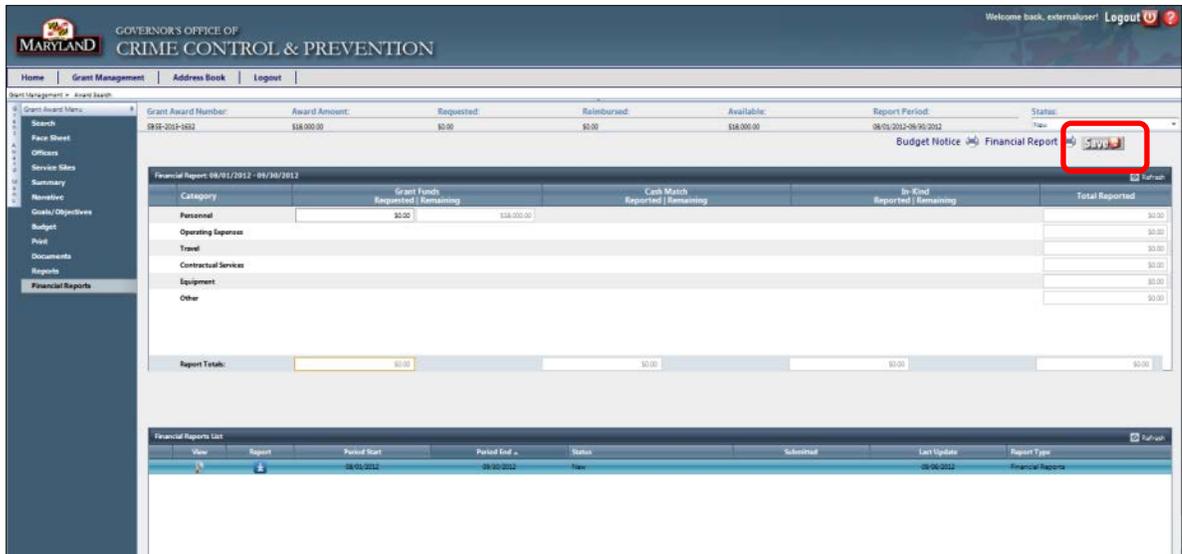


Figure 242 - Enter Budget Items into Financial Report

- In the example shown in this figure, the project is funded entirely by grant dollars, so text boxes are only available in the Grant Dollars section.
  - If any of the funding for your project comes from Cash Match or In-Kind Match, text boxes will be available in those sections.
  - Dollars entered for each budget category in each area are summed and displayed in the Total Reported column on the right side of the process area.
8. When you've completed entering your budget information, click the SAVE button, in the upper right corner, to SAVE your work. NOTE: If you do not click Save before moving to a different item in the Grant Award Menu, you will lose your work.
  9. Submit your quarterly Financial Report for approval by clicking the drop-down list under the word Status and selecting "Submit for Approval". After doing this, the Status will change to Submitted.

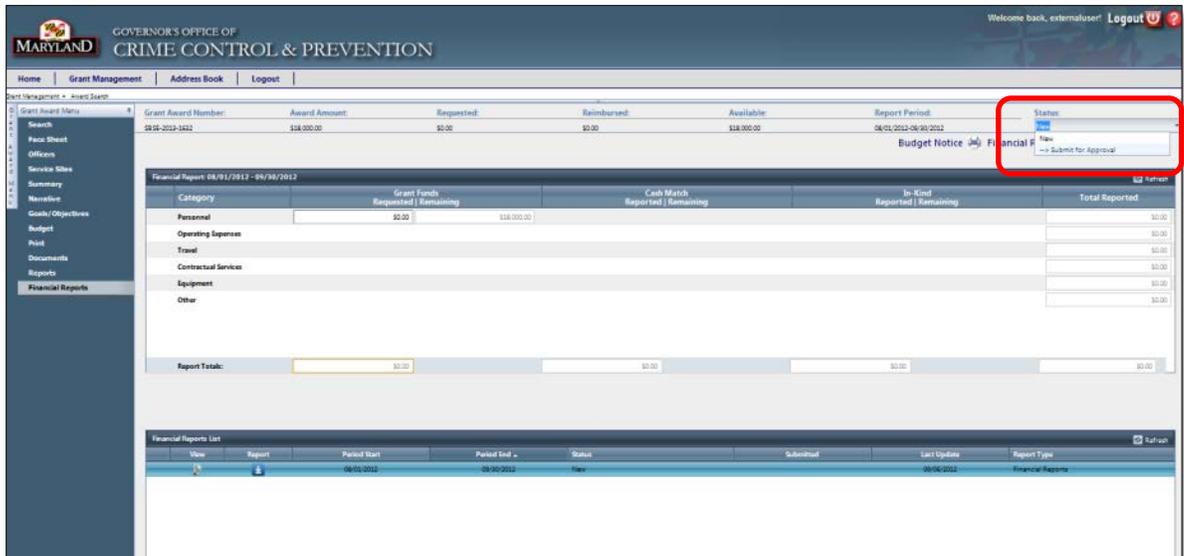


Figure 243 – Submit Financial Report for Approval

### 7.8.2.5 Print Programmatic Reports for Signature and Submission by Mail

The final step in Programmatic Reporting is to print, sign, and mail in your quarterly reports.

1. Click Reports in the Grant Award Menu to return to the Reports process area.
2. For each reporting category you completed, locate the record you just added and click on the Print icon in that record as shown in the figure below.

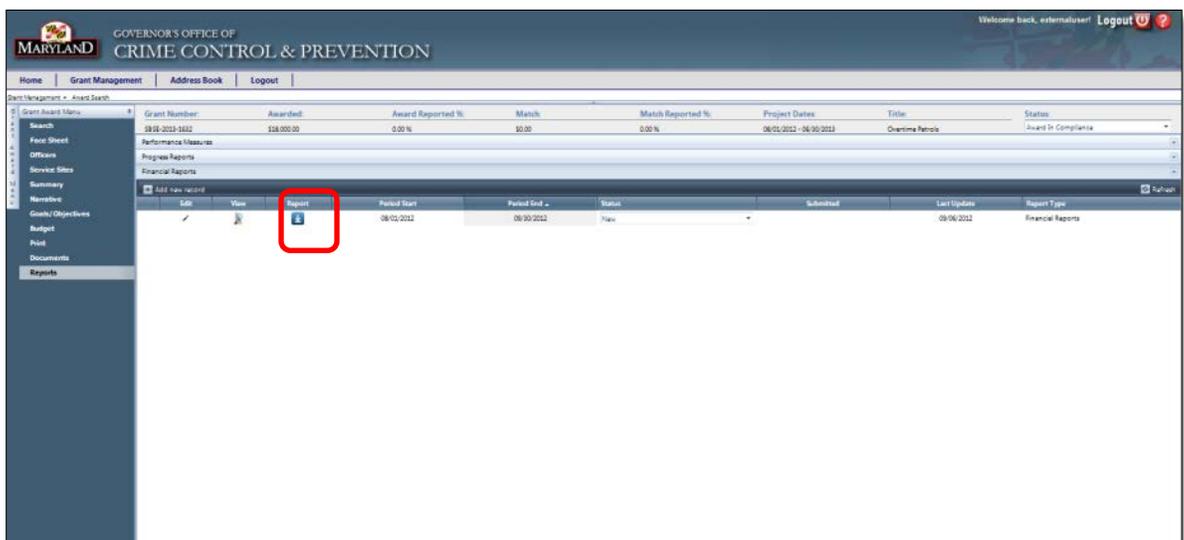


Figure 244 – Print Programmatic Reports

3. When your browser prompts you (as shown in the figure below) either click Save to save the PDF report to your hard disk or click Open to open the report in Adobe Acrobat.

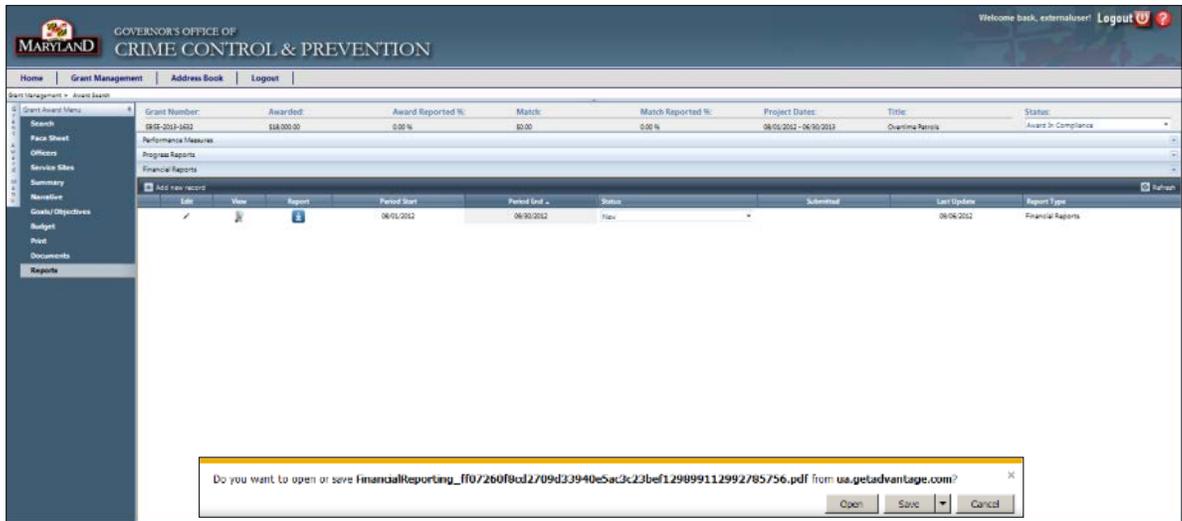


Figure 245 - Saving /Opening Programmatic Reports from Browser

4. Print your report, sign where applicable, and mail to GOCCP.

### 7.8.3 Create or Edit an Grant Award Activity Log Item

1. Click the Activity Log tab to highlight it.
2. Click Add new record below the Activity Log tab. Upon clicking *Add new record*, the data entry screen appears:

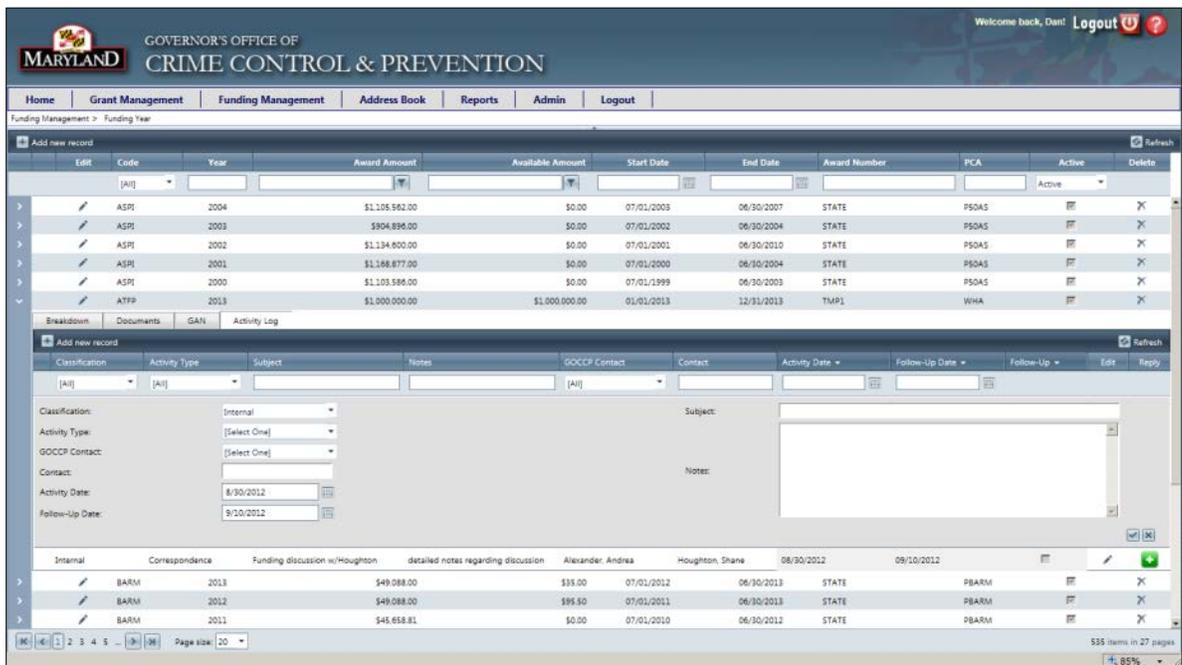


Figure 246 - Activity Log Tab - Data Entry Screen

3. Complete each field in the initial data entry screen for the new Activity Log record as follows:

ACTIVITY LOG TAB – “ADD NEW RECORD” FIELDS	
Classification	Click the dropdown list and select either <b>Internal</b> or <b>External</b> .
Activity Type	Click the dropdown list and select one of the following Activity Types: <b>Info Requested, Info Received, Sent Non-Funding, Correspondence, Phone Conversation, Site Visit, Application Notes, Meeting Note, Other, Email, Award Note, Close Out, and GAN</b> .
GOCCP Contact	Click the dropdown list and select the GOCCP contact relevant to this record.
Contact	Enter the name of the external contact (if applicable).
Activity Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Follow-Up Date	Click on the calendar icon and select the date you wish assigned to this activity. Alternatively you can type the date directly into the date field.
Subject	Enter a brief description of the subject of this activity log entry into this field.
Notes	Enter any relevant notes regarding the activity into this field.

- Click the checkmark icon located in the lower right hand corner of the Data Entry screen to save the new Activity Log record.

To modify an existing Activity log entry, click the pencil icon in the Edit column, open and save. Where you see “more....” in blue, hover with your mouse to display the full Notes section.



Figure 247 - Edit an existing Activity Log Entry within a Grant Award; see full notes without opening

## 7.8.4 Create a Grant Award Notice of Dispute

The Notice of Disputes page displays data pertaining to Disputes for the Award; you will soon see that Site Visits and Audits pages work similarly in functionality.

- Click the Add New Record icon in the upper left section of the page to load a form the User can use to record details for new Notice of Disputes.
- Use the form to enter calendar fields and free text fields to annotate:
  - Period Begin Date - calendar feature
  - Period End Date - calendar feature
  - Notice Sent Date - calendar feature
  - Dispute Sent To - Drop-down menu of recipient roles, Project Director, Fiscal Officer
  - Dispute Type - Drop-down list of types allows multiple selections via check box
  - Notes - free text field

- Additional Information - free text field
- Document Types – Indicates the type of document associated with the notice (Financial Report, Award Acceptance, etc)

**Note:** If you select the Dispute Type “Other”, the resulting report will not include any text entered in the Notes field; it will include any text entered in the Additional Information field. If you select any other Dispute Type, the report will include text entered in the Notes field and not text entered in the Additional Information field.

3. At the bottom right of the data entry form is a check mark to save the record or an x to cancel the entry.
4. When the record is saved, Notice of Dispute Data displays in the window below the form (when a New Record is open) or at the top of the web page.

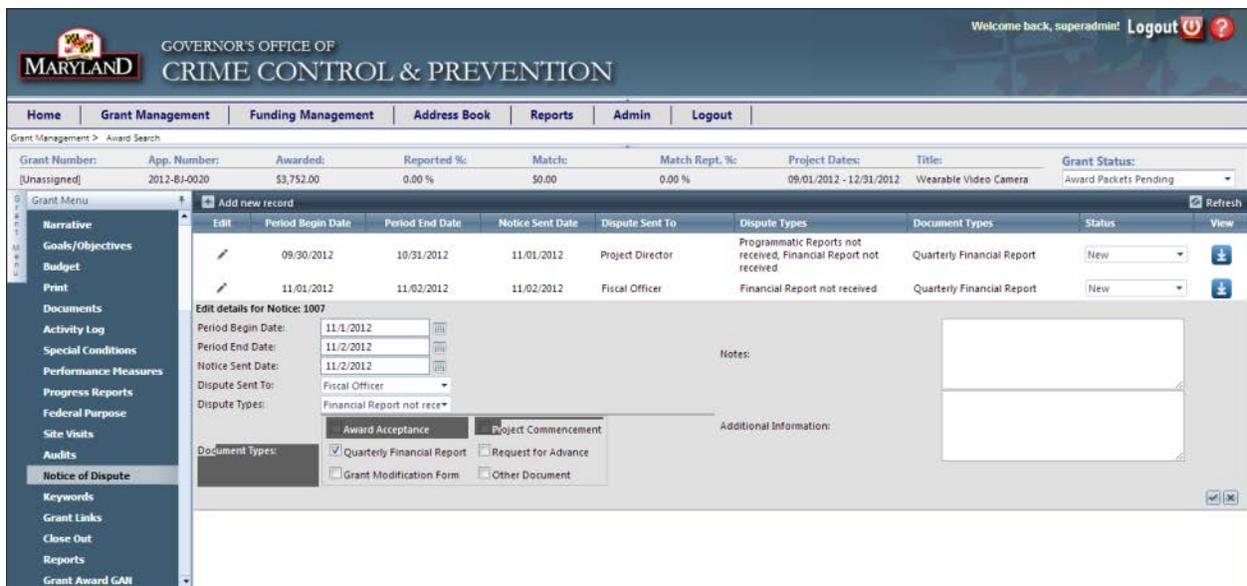


Figure 248 - Grant Award Notice of Disputes Screen

5. In the window above the data entry form, the User can view previous Notice of Dispute records.
6. To the right of Notice of Dispute listings are three features:
  - a. From the drop-down Status menu that displays New for newly saved entries, which can be changed to Submit for Approval
  - b. A View icon to save the record to your hard drive or to print the report
  - c. An Edit icon to make changes to the record

### 7.8.5 Log Grant Award Site Visits

The Site Visit page displays data pertaining to Site Visits.

1. Click the Add New Record icon in the upper left section of the page to load a form the User can use to record details for new Site Visits.
2. Enter the data the form supports including calendar fields and free text fields to annotate:

- Assigned Date - calendar feature
  - Initiated Date - calendar feature
  - Site Visit Date - calendar feature
  - Date of Report - calendar feature
  - Monitor - drop-down menu of GOCCP staff names
  - Narrative - free text field
  - Comments free text field
  - Recommendations - free text field
3. At the bottom right of the data entry form is a check mark to save the record or an x to cancel the entry.
  4. When the record is saved, Site Visit Data displays in the window below the form (when a New Record is open) or at the top of the web page.
  5. In the window below the data entry form, the User can view previous Site Visit records.

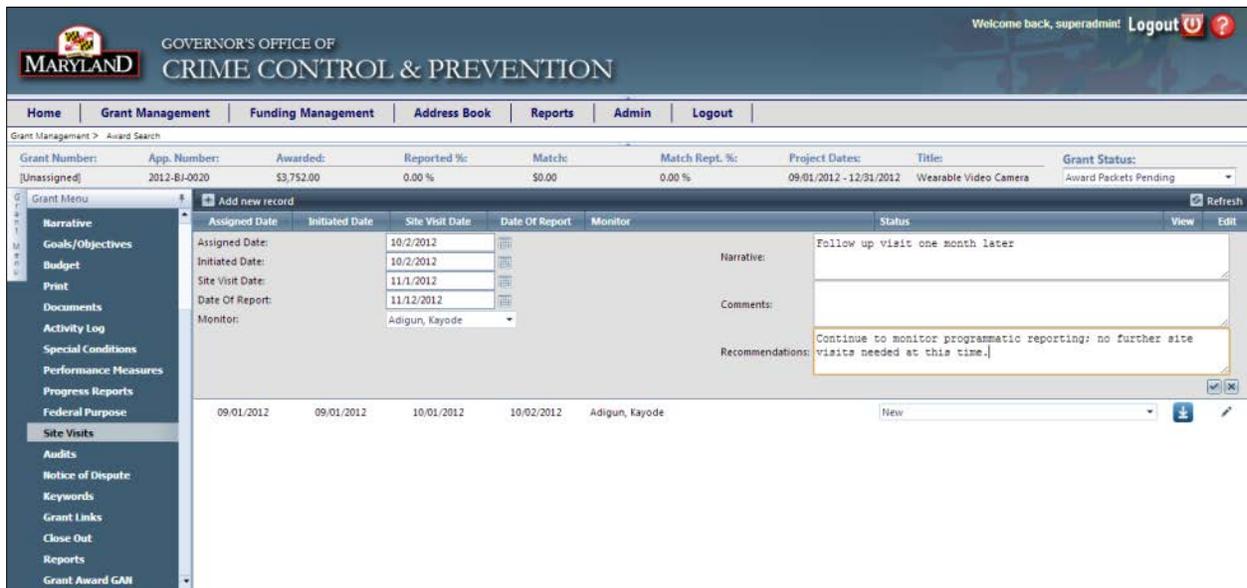


Figure 249 - Grant Award Site Visits Screen

6. To the right of Site Visit listings are three features:
  - A drop-down Status menu that displays New for newly saved entries, which can be changed to Submit for Approval, and Approved.
  - A Download icon to save the record to your hard drive or to print the report
  - An Edit icon to make changes to the record

### 7.8.6 Log Grant Award Audits

Similar to the Site Visits page in functionality, the Audits page displays data pertaining to Audits performed for the Award.

1. Begin by clicking the Add New Record icon in the upper left section of the page to load a form the User can use to record details for new Audits. The form supports calendar fields and free text fields to annotate:
  - Assigned Date - calendar feature
  - Initiated Date - calendar feature
  - Site Visit Date
  - Closing Letter Sent Date - calendar feature
  - Date of Report - calendar feature
  - Auditor - Drop-down menu of GOCCP staff names
  - Decision - Satisfactory or Unsatisfactory
  - Scope of Audit - free text field
  - Findings - free text field
  - Recommendations - free text field
2. At the bottom right of the data entry form is a check mark to save the record or an x to cancel the entry.
3. When the record is saved, Audit Data displays in the window below the form (when a New Record is open) or at the top of the web page.
4. In the window above the data entry form, the User can view previous Audit records.

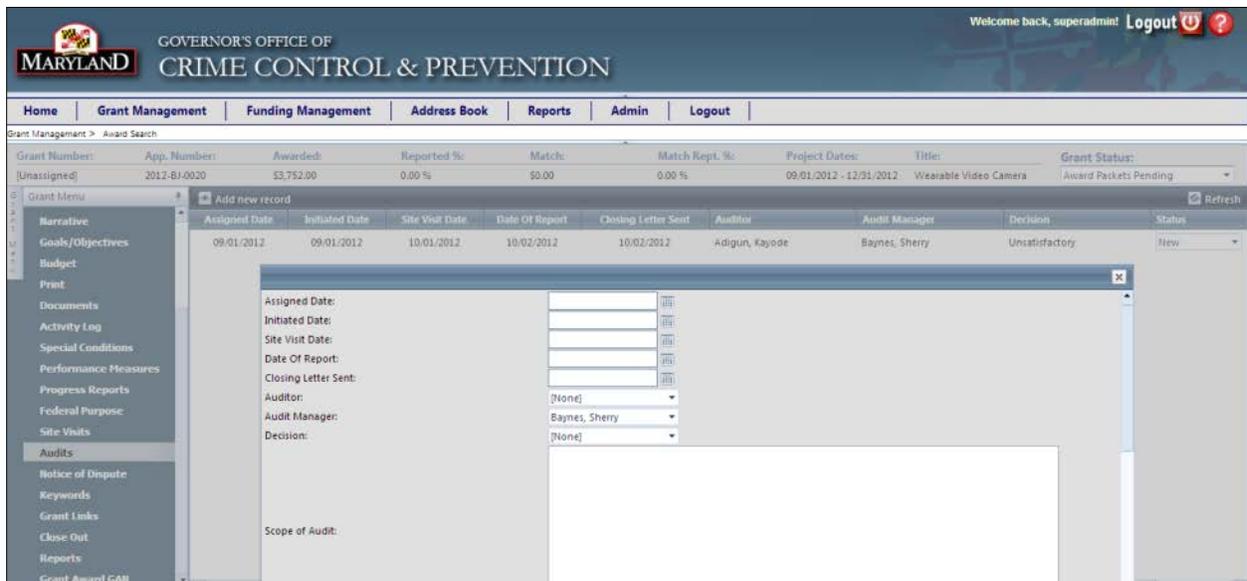


Figure 250 - Grant Award Audits Screen

5. To the right of Audit listings are three features:
  - A drop-down Status menu that displays New for newly saved entries, which can be changed to Submit for Approval or Approved
  - A Download icon to save the record to your hard drive or to print the report
  - An Edit icon to make changes to the record

## 7.8.7 Create a Grant Award Grant Adjustment Notice (GAN) (Accessibility based on Permissions)

Use the online Grant Adjustment Notice (GAN) feature to make changes to your Grant Award directly within GMS:

- Create a General GAN to make changes to your grant's Start and End Date, Fiscal Officer, Project Director, Regional Monitor or Funding Manager.
- Create a Budget GAN to make revisions to your grant award budget.

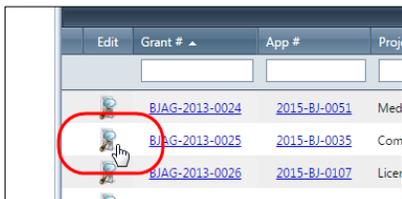
Use the procedure below to create a new GAN.

### NOTES

- You will create the GAN first, then you'll select whether it is a General or a Budget GAN.
- If you switch from General to Budget or vice-versa, you will lose any information you've input thus far
- You may only have one GAN of each type open at a time.
- When doing a budget GAN, if you change a salary, you must MANUALLY adjust the fringe benefits accordingly; they will not automatically adjust.

To add a new GAN:

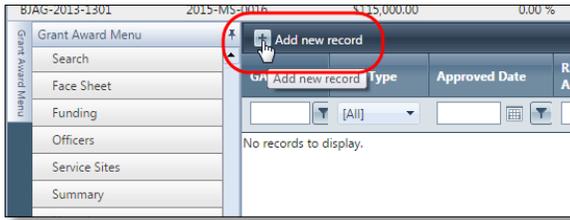
1. Locate the Grant Award for which you want to add a new GAN in the list of awards on the GMS Home Screen and click the Edit icon.



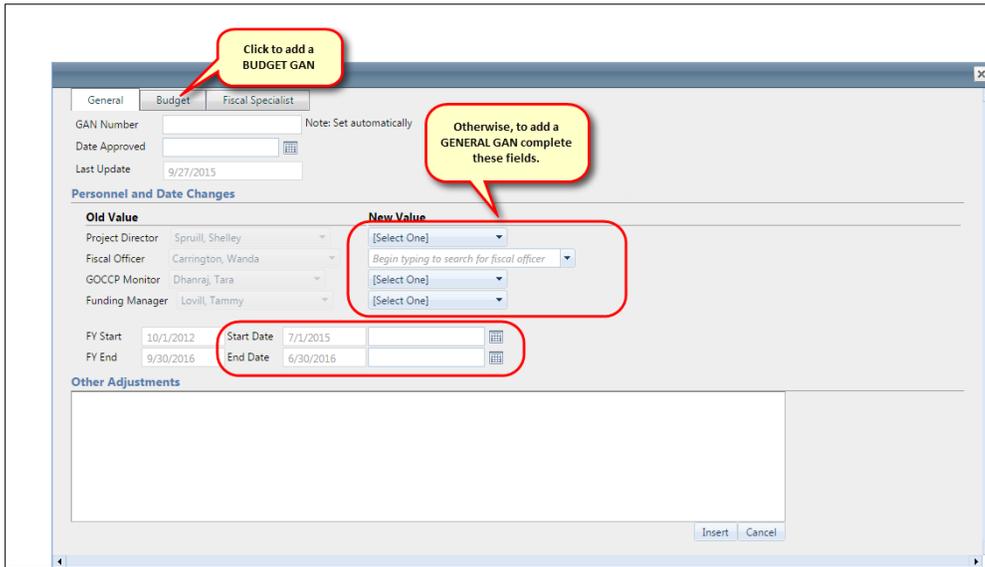
2. In the Grant Award Menu, scroll down and click on Grant Award GAN.



- Click on Add New Record.



- The GAN screen is displayed. If you are creating a BUDGET GAN, click on the **Budget** tab and skip to step 5. If you are creating a GENERAL GAN, continue with this step. NOTE: The **Fiscal Socialist** can only be changed by GOCCP internal staff, so you may not see that tab.

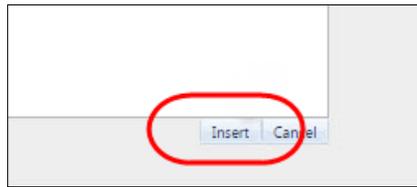


- Complete the **Personnel and Date Changes** section, using the following table as a guide:

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	The date this GAN was approved will appear in this field.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this field.
<b>Personnel and Date Changes</b>	
<b>Project Director</b>	
Old Value	Display only: Displays the person currently assigned to the Project Director role for this Grant Award.
New Value	Select the new Project Director from the drop-down list.
<b>Fiscal Officer</b>	
Old Value	Display only: Displays the person currently assigned to the Fiscal Officer role for this Grant Award.
New Value	Click in this field and begin typing the first few letters of the last name of the fiscal officer you want to assign to this role, then select the name from the resulting list.

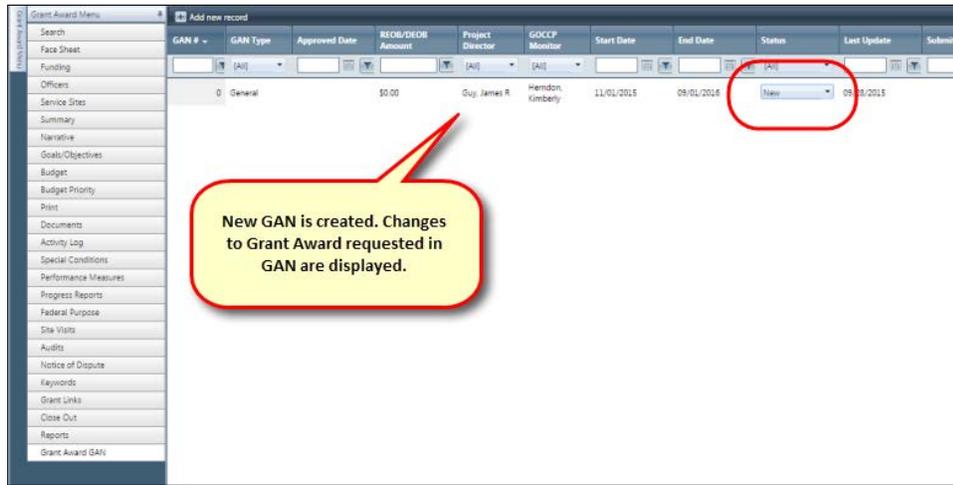
<b>GOCCP Monitor</b>	
Old Value	Display only: Displays the GOCCP staff member currently assigned to the Regional Monitor role for this Grant Award.
New Value	Select the new GOCCP Regional Monitor from the drop-down list. Can only be edited by Internal Staff
<b>Funding Manager</b>	
Old Value	Display only: Displays the person currently assigned to the Funding Manager role for this Grant Award. Only visible to Internal Staff.
New Value	Select the new Funding Manager from the drop-down list. Only visible to Internal staff.
<b>Start Date</b>	
Old Value	Display only: Displays the original Start Date of the Grant Award.
New Value	Enter the new Start Date for this Grant Award. NOTE: The New Start Date must occur <b>on or after</b> the value in the FY Start date box
<b>End Date</b>	
Old Value	Display only: Displays the original End Date of the Grant Award.
New Value	Enter the new End Date for this Grant Award. NOTE: The New End Date must occur <b>on or before</b> the value in the FY End date box
Other Adjustments	This is a free-form text field. Enter any other miscellaneous adjustments or amendments to the Grant Award based on this GAN.

- b. When you're finished making changes to personnel and dates, click the **Insert** button below the Other Adjustments box to save your changes.

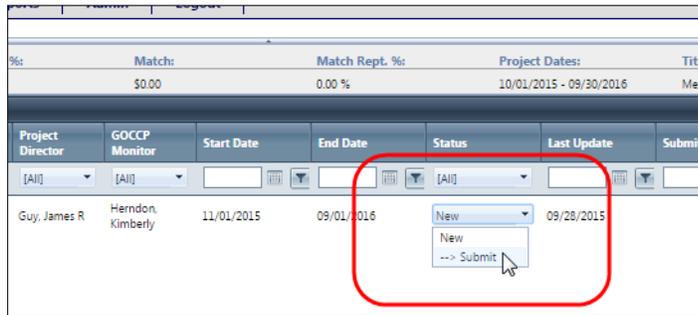


- c. The GAN is created, and you are returned to the Grant Award Menu. The GAN record is displayed and shows the new dates and/or people assigned to roles that you requested in the GAN.

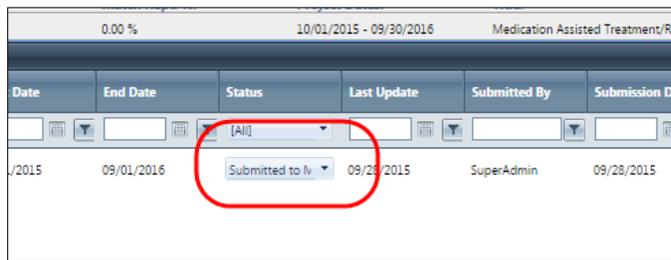
Note that the Status of the GAN is **New** and the GAN # will be **0** until it is executed or denied. You can edit or revise the GAN if you need to – refer to Section **7.8.8 Modifying Grant Award Grant Adjustment Notices (GANs)**.



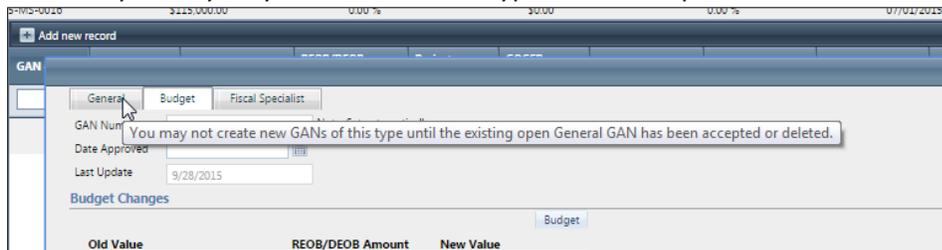
- d. To submit the GAN for approval, click the status dropdown arrow in the Status column, and select Submit.



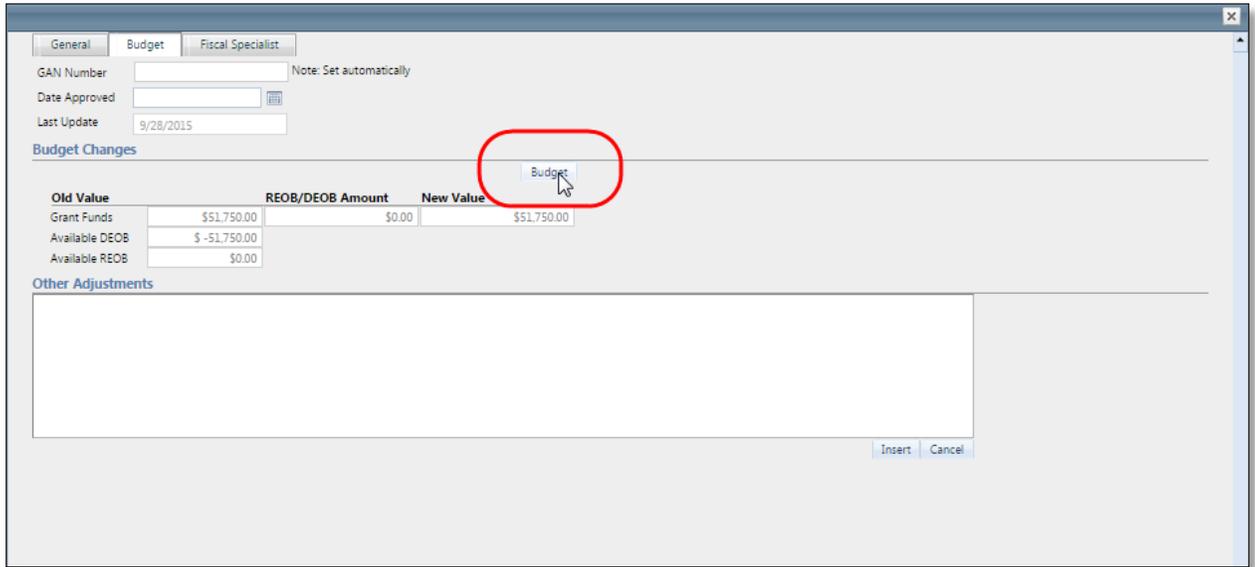
- e. The status will then change to **Submitted to Monitor**.



- f. Note that you may only have one GAN of type GENERAL open at one time:



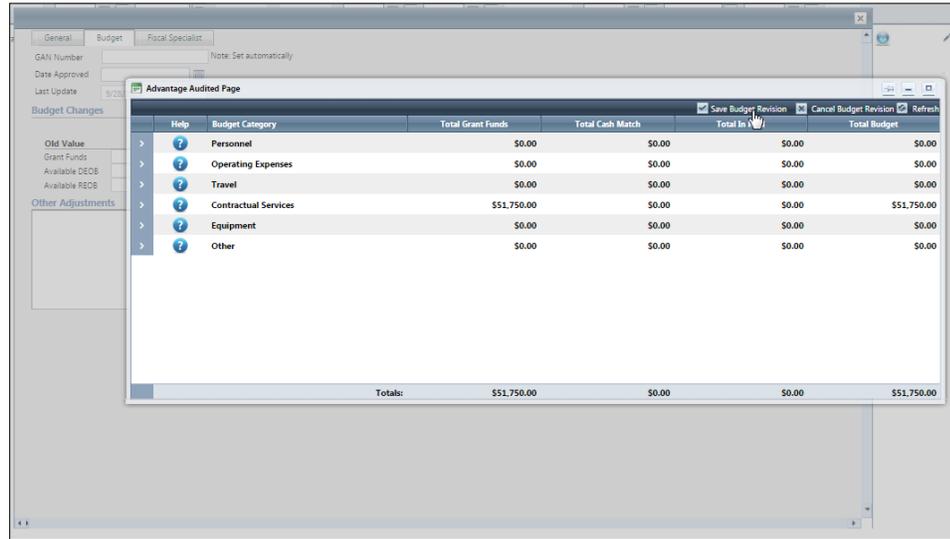
5. After clicking the Budget tab, the Budget GAN screen is displayed.



- a. The budget changes fields are display-only and will be updated upon successful creation of a budget GAN:

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	Enter the date this GAN was approved.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this field.
<b>Budget Changes</b>	
Grant Funds Old Value	Displays the original total dollar amount allocated to this Grant Award.
Grant Funds REOB/DEOB Amount	Displays the dollar amount of the REOB/DEOB funding for this GAN.
Grant Funds New Value	Displays the new total dollar amount allocated to this Grant Award after the REOB/DEOB amount is entered.
Available DEOB	Displays the available DEOB dollar amount.
Available REOB	Displays the available REOB dollar amount.

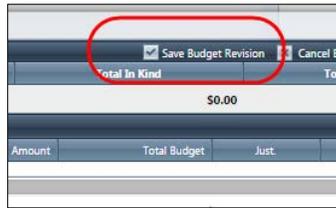
- b. To create a budget GAN, click on the Budget button shown directly under the Budget Changes line in the above figure. Doing this will take you to the Budget Revision screen.



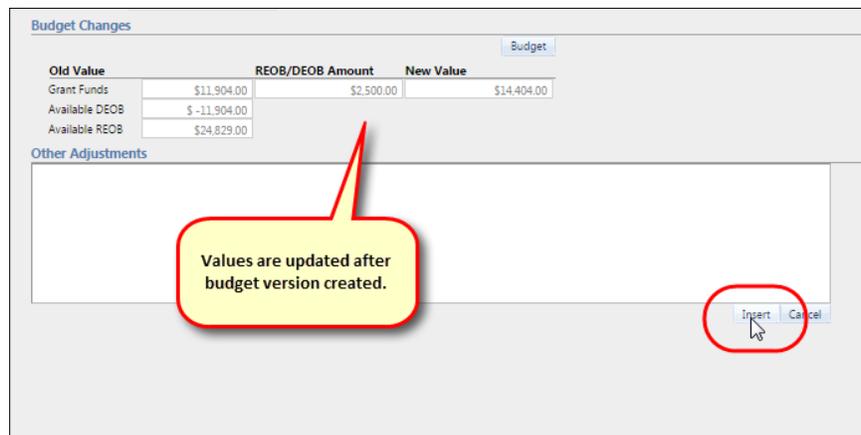
- c. Entering a budget revision is described in detail in **Section 7.3.3 – Add a Budget Revision** in this User Manual. In addition, a help video is available online at <https://youtu.be/ORqhp3aKRS8>

**HINT:** Be sure to add a justification for every budget line item you create!

- d. After creating your budget revision, click **Save Budget Revision**:



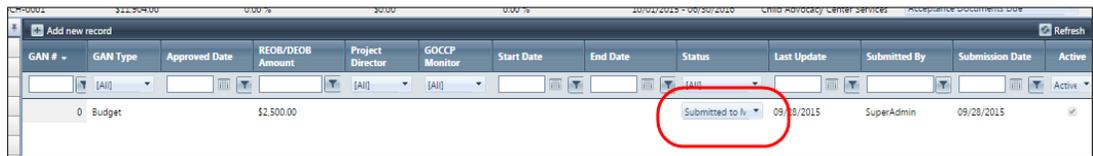
- e. You are then returned to the Budget GAN screen. Click the **Insert** button to save your budget GAN:



- f. To submit the GAN for approval, click the status dropdown arrow in the Status column, and select **Submit**.



- g. The status will then change to **Submitted to Monitor**.



### 7.8.8 Modifying Grant Award Grant Adjustment Notices (GANs)

If there are multiple completed GANs against a single grant award, you will see the most recent one on top; ordered numerically.

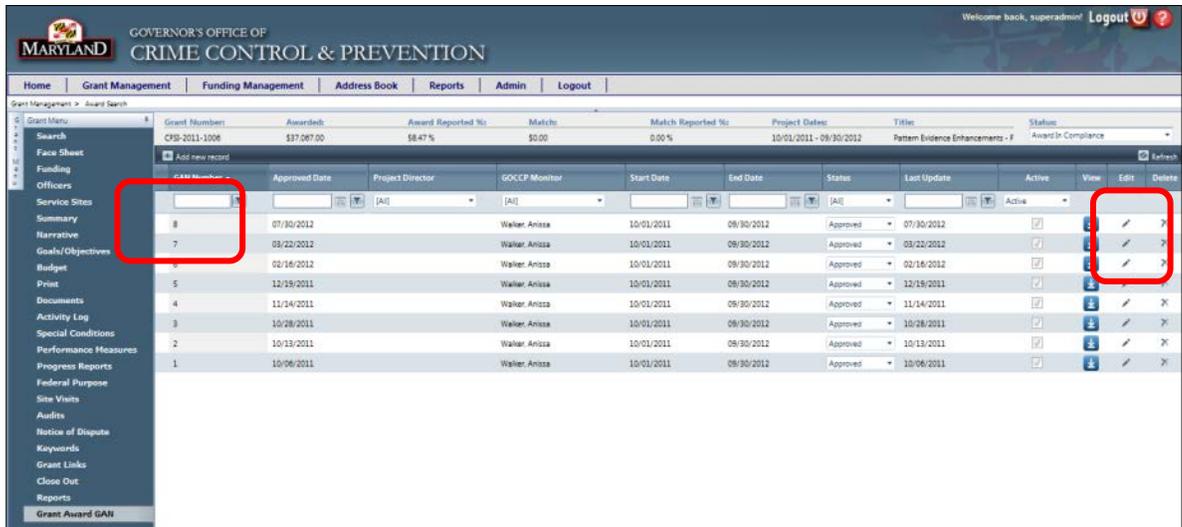
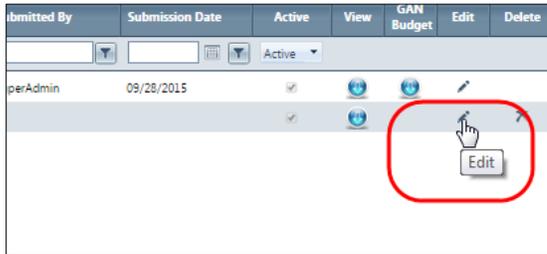


Figure 251 - Selecting a GAN to edit from List

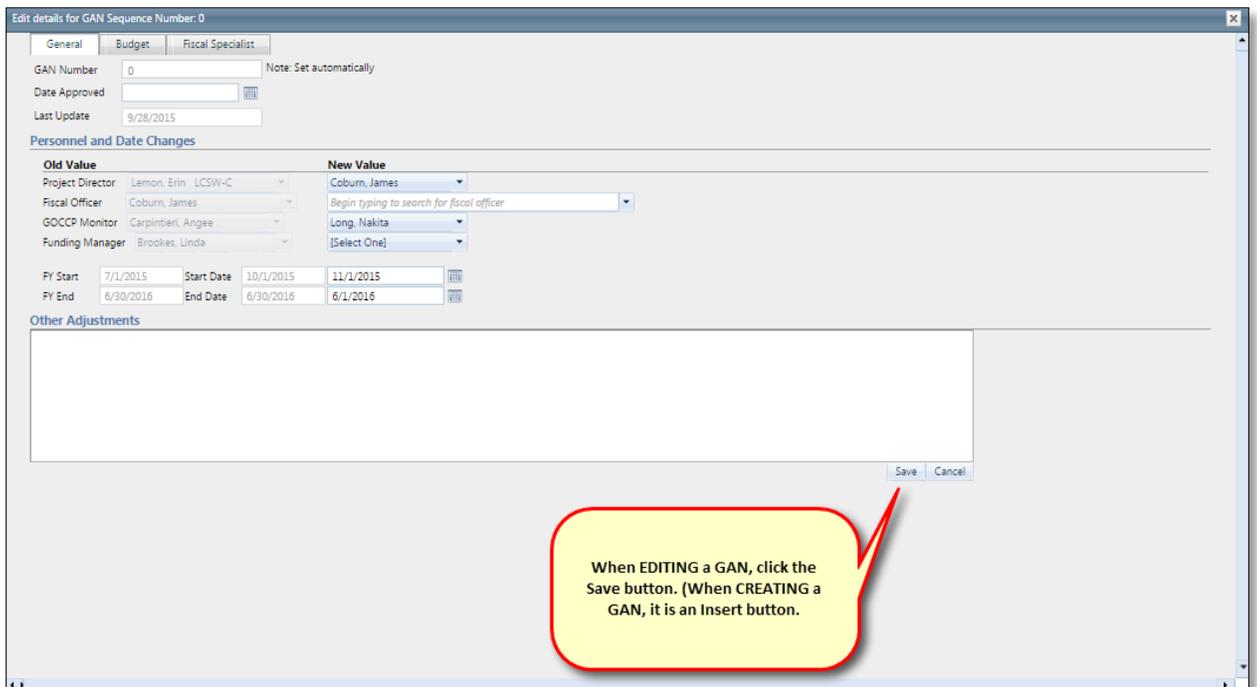
To Edit a GAN:

1. Locate the GAN you wish to edit, then click on the Pencil icon for that GAN:



2. The GAN edit screen appears. Whether the GAN is General or Budget, follow the instructions in the previous section to make your changes.

The only difference when you are Editing a Gan versus Creating one is that when you are ready to save your changes, instead of clicking the **Insert** button when you are finished, there will be a **Save** button instead. Click that to save the changes to your GAN.

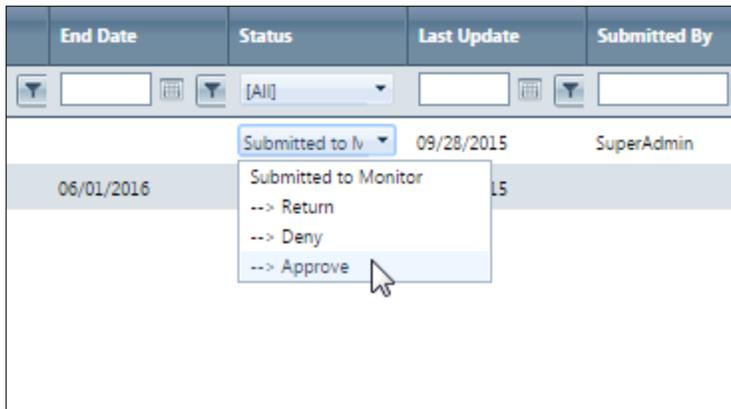


### 7.8.8.1 GAN Approval (Accessibility based on Permissions)

GAN's go through a chain of reviews prior to being executed or denied. Each role in the chain, for example Regional Manager and Funding Manager, has the opportunity to deny the GAN, return the GAN for revision, or approve the GAN. Once a role approves the GAN, it is submitted to the next role in the chain, until it reaches the Fiscal Specialist who Executes the GAN, which makes all changes to the Grant Award that were requested in the GAN, including changes to the Award Budget.

To approve a GAN:

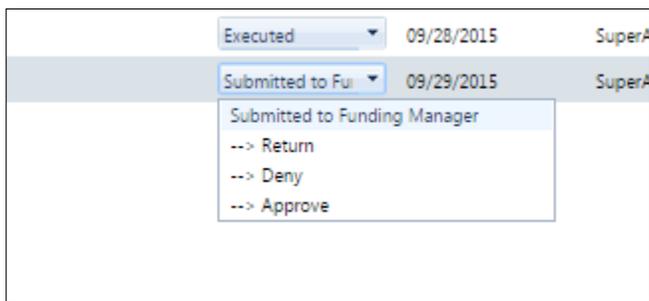
1. Locate the GAN, click the drop-down arrow under the Status column for that GAN:



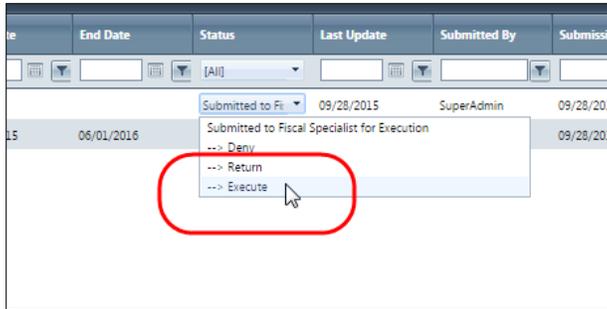
2. Select **Return** to return the GAN or revision, **Deny** to deny the GAN, and **Approve** to send it to the next role for review.

**NOTE:** If your role is Regional Monitor, selecting Return will return the GAN for revision to the user who originated it. If you are in any role other than Regional Monitor, selecting Return returns the GAN to the prior role in the chain who approved the GAN before sending it to you.

3. For example, once a user submits a GAN, the status of the GAN changes to **Submitted to Monitor**. The Regional Monitor sees that status, and when she clicks the drop-down arrow in the Status column of that GAN, she can then Return, Deny, or Approve. If she approves, the status will change once again, to **Submitted to Funding Manager**.



- This will continue, until at the last stage of approval, the Fiscal Specialist has the opportunity to Return, Deny, or **Execute**. Where other roles would select **Approve**, the Fiscal Specialist selects **Execute** – all approvals have been made, and all changes requested in the GAN are incorporated into the Grant Award when the GAN is executed.



### 7.8.8.2 Viewing GAN Budget Changes Immediately

Changes to the Grant Award budget made by a GAN can be viewed immediately after the GAN has been approved and executed. For example, if this is the original award budget, containing nothing in the Equipment section:

Original Grant Award Budget		Total Grant Funds	Total Cash Match	Total In Kind	Total Budget
>	Personnel	\$0.00	\$0.00	\$0.00	\$0.00
>	Operating Expenses	\$0.00	\$0.00	\$0.00	\$0.00
>	Travel	\$1,779.00	\$0.00	\$0.00	\$1,779.00
>	Contractual Services	\$3,200.00	\$0.00	\$0.00	\$3,200.00
>	Equipment	\$0.00	\$0.00	\$0.00	\$0.00
>	Other	\$6,925.00	\$0.00	\$0.00	\$6,925.00

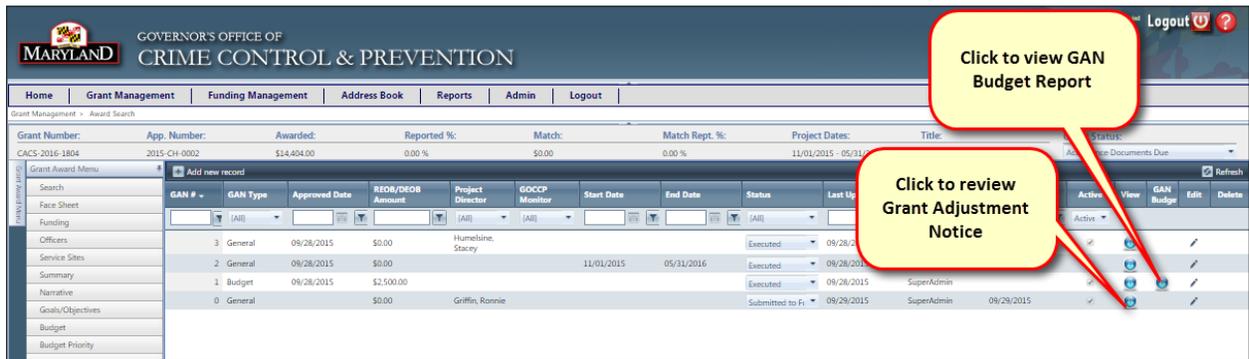
then by executing a Budget GAN that specifies \$2500 in Equipment:



we can immediately view the Budget (click Budget in the Grant Award Menu) and see the immediate impact of the GAN:

Current Grant Award Budget (#1)		Total Grant Funds	Total Cash Match	Total In Kind	Total Budget
>	Personnel	\$0.00	\$0.00	\$0.00	\$0.00
>	Operating Expenses	\$0.00	\$0.00	\$0.00	\$0.00
>	Travel	\$1,779.00	\$0.00	\$0.00	\$1,779.00
>	Contractual Services	\$3,200.00	\$0.00	\$0.00	\$3,200.00
>	Equipment	\$2,500.00	\$0.00	\$0.00	\$2,500.00
>	Other	\$6,925.00	\$0.00	\$0.00	\$6,925.00

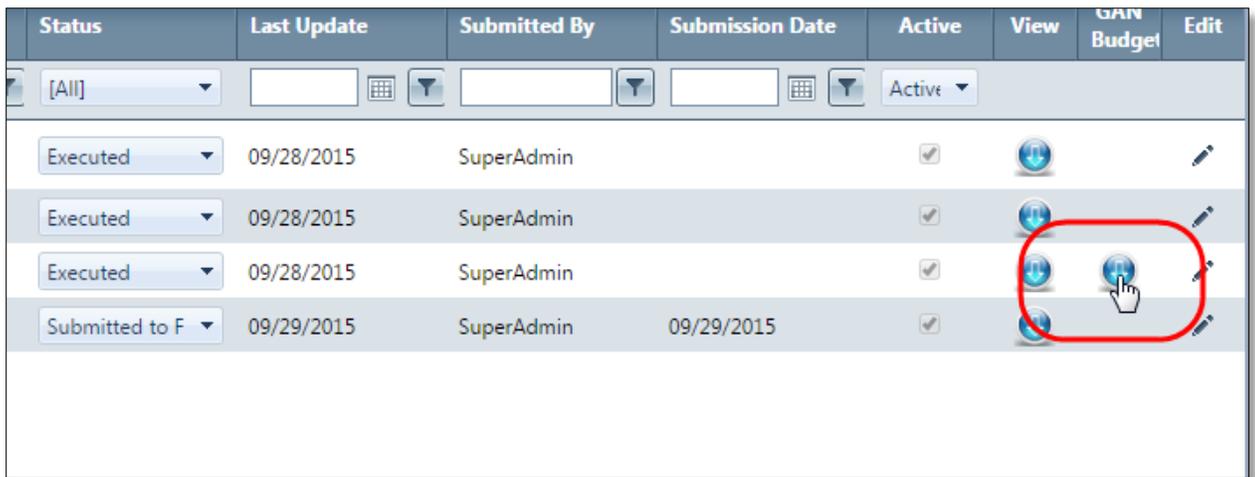
Another way of immediately viewing GAN-proposed budget changes to an award is to run the GAN Budget report. Similarly, you can view Grant Adjustment Notices for both General and Budget GANs (refer to **Section 7.8.8.2.2 – Grant Adjustment Notices**).



### 7.8.8.2.1 GAN Budget Report

To View the GAN Budget Report

1. Locate the Budget GAN in the list of GAN's
2. Click on the globe icon in the GAN Budget column of that GAN



3. The report will print to a PDF file and open in another tab of your browser, unless you save the file to your hard disk instead. Following is an example GAN Budget Report.

**NOTE:** GAN Budget Reports can span several pages. On each page, the top half of the page shows grant award information, followed by a funding summary. After that, each budget category is shown. Using the example from the previous section, we added a \$2500 entry for laptop computer in the Equipment section of the budget. This will be shown on the report:

**GAN Budget Report – Page 1**



Governor's Office of Crime Control & Prevention

GOCCP Regional Monitor: Blonder, Ellen  
GOCCP Fiscal Specialist: Galarza, Andrew

**Grant Award Information**

**GAN Budget Notice**

**Grant Award Number:** CACS-2016-1804  
**Sub-recipient:** Frederick County, Maryland  
**Project Title:** Child Advocacy Center Services  
**Implementing Agency:** Frederick County, Maryland  
**Award Period:** 11/01/2015 - 05/31/2016 CFDA: State

Funding Summary			Prior Total	Current Total	Difference
Grant Funds	100.0 %		\$11,904.00	\$14,404.00	\$2,500.00
Cash Match	0.0 %		\$0.00	\$0.00	\$0.00
In-Kind Match	0.0 %		\$0.00	\$0.00	\$0.00
<b>Total Project Funds</b>			<b>\$11,904.00</b>	<b>\$14,404.00</b>	<b>\$2,500.00</b>

Budget Version: 0

**Travel**

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Mid-Atlantic Conference on Child Abuse and Neglect - Lodging	Grant Funds	12	\$148.25	\$1,779.00	\$1,779.00	\$0.00
				Cash Match:	\$0.00	\$0.00
				Grant Funds:	\$1,779.00	\$1,779.00
				<b>Travel Total:</b>	<b>\$1,779.00</b>	<b>\$0.00</b>

**Contractual Services**

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Interpreter	Grant Funds	80	\$40.00	\$3,200.00	\$3,200.00	\$0.00
				Cash Match:	\$0.00	\$0.00
				Grant Funds:	\$3,200.00	\$3,200.00
				<b>Contractual Services Total:</b>	<b>\$3,200.00</b>	<b>\$0.00</b>

**Budget Sections**

**GAN-proposed Budget Changes are shown in the Difference Column**

**GAN Budget Report Page 2**



Governor's Office of Crime Control & Prevention

GOCCP Regional Monitor: **Blonder, Ellen**  
GOCCP Fiscal Specialist: **Galarza, Andrew**

**GAN Budget Notice**

**Grant Award Number:** CACS-2016-1804  
**Sub-recipient:** Frederick County, Maryland  
**Project Title:** Child Advocacy Center Services  
**Implementing Agency:** Frederick County, Maryland  
**Award Period:** 11/01/2015 - 05/31/2016

CFDA: State

Funding Summary				Prior Total	Current Total	Difference
Grant Funds				\$4,000.00	\$2,500.00	\$2,500.00
Cash Match	0.0 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
In-Kind Match	0.0 %	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Project Funds</b>			<b>\$11,904.00</b>	<b>\$14,404.00</b>	<b>\$2,500.00</b>	

Budget Version: 0

**Equipment**

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Laptop Computer	Grant Funds	1	\$2,500.00	\$0.00	\$2,500.00	\$2,500.00
				Cash Match:	\$0.00	\$0.00
				Grant Funds:	\$0.00	\$2,500.00
				<b>Equipment Total:</b>	<b>\$0.00</b>	<b>\$2,500.00</b>

**Other**

Description	Funding	Quantity	Unit Cost	Total Prior Budget	Total New Budget	Difference
Maryland Children's Alliance - Membership	Grant Funds	1	\$300.00	\$300.00	\$300.00	\$0.00
Mid Atlantic Conference on Child Abuse and Neglect - Registration	Grant Funds	11	\$375.00	\$4,125.00	\$4,125.00	\$0.00
National Children's Alliance - Membership	Grant Funds	1	\$500.00	\$500.00	\$500.00	\$0.00
NCATrak User Fee	Grant Funds	1	\$2,000.00	\$2,000.00	\$2,000.00	\$0.00
				Cash Match:	\$0.00	\$0.00
				Grant Funds:	\$6,925.00	\$6,925.00
				<b>Other Total:</b>	<b>\$6,925.00</b>	<b>\$0.00</b>

Line Item added in GAN

**GAN Budget Report Page 3**



Governor's Office of Crime Control & Prevention

GOCCP Regional Monitor: **Blonder, Ellen**  
GOCCP Fiscal Specialist: **Galarza, Andrew**

**GAN Budget Notice**

**Grant Award Number:** CACS-2016-1804  
**Sub-recipient:** Frederick County, Maryland  
**Project Title:** Child Advocacy Center Services  
**Implementing Agency:** Frederick County, Maryland  
**Award Period:** 11/01/2015 - 05/31/2016

CFDA: State

Funding Summary			Prior Total	Current Total	Difference
Grant Funds	100.0 %		\$11,904.00	\$14,404.00	\$2,500.00
Cash Match	0.0 %	\$0.00	\$0.00	\$0.00	\$0.00
In-Kind Match	0.0 %	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Project Funds</b>			<b>\$11,904.00</b>	<b>\$14,404.00</b>	<b>\$2,500.00</b>

Budget Version: 0

**Approved:** \_\_\_\_\_ **Effective Date:** 11/1/2015

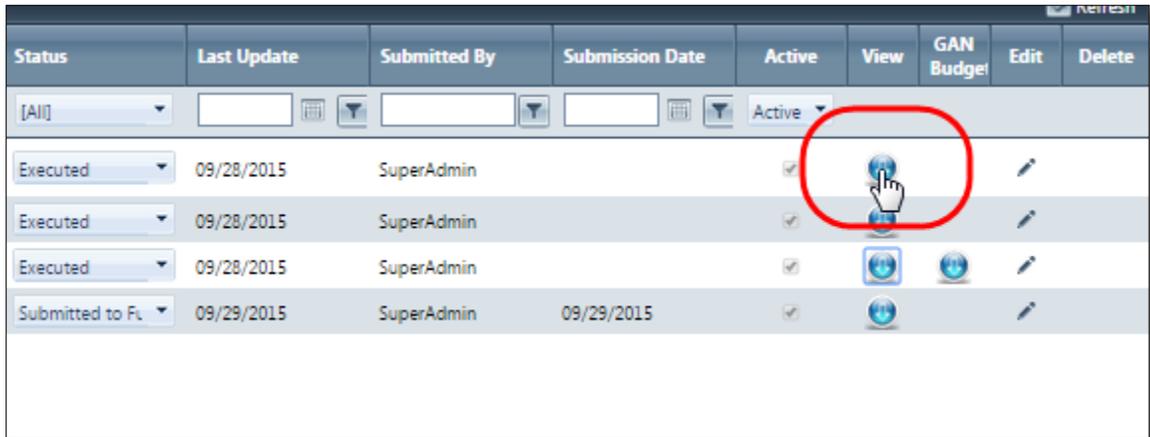
GOCCP Authorized Representative

### 7.8.8.2.2 Grant Adjustment Notices

Grant Adjustment Notices are small reports that summarize the changes to the grant award that will occur when a GAN is approved and executed.

To View the GAN Budget Report

1. Locate the GAN in the list of GAN's for which you want to view the report
2. Click on the globe icon in the **View** column of that GAN



The screenshot shows a table with the following columns: Status, Last Update, Submitted By, Submission Date, Active, View, GAN Budget, Edit, and Delete. The table contains four rows of data. The first three rows have a status of 'Executed' and a submission date of '09/28/2015'. The fourth row has a status of 'Submitted to FL' and a submission date of '09/29/2015'. All rows show 'SuperAdmin' as the submitter. A red circle highlights a globe icon in the 'View' column of the first row, with a mouse cursor pointing at it.

Status	Last Update	Submitted By	Submission Date	Active	View	GAN Budget	Edit	Delete
[All]				Active				
Executed	09/28/2015	SuperAdmin		✓				
Executed	09/28/2015	SuperAdmin		✓				
Executed	09/28/2015	SuperAdmin		✓				
Submitted to FL	09/29/2015	SuperAdmin	09/29/2015	✓				

3. The report will print to a PDF file and open in another tab of your browser, unless you save the file to your hard disk instead. Following are two **example Grant Adjustment Notices**.

Governor's Office of Crime Control and Prevention

CACS-2016-1804

Funding Year

CFDA: State

**GRANT ADJUSTMENT NOTICE**

Adjustment No: 1

**TITLE OF PROGRAM:** Child Advocacy Center Services  
**FUNDING AGENCY:** Frederick County, Maryland  
**FUNDING SUBAGENCY:** Frederick County, Maryland  
**FUNDING PERIOD:** 11/01/2015 To 05/31/2016

The GAN-proposed budget amount is shown here.

**SECTION I. DEOBLIGATIONS & REOBLIGATIONS:**

Previous Amount of Grant Award	\$11,904.00
Reobligation / Deobligation Amount	\$2,500.00
Adjusted Amount of Award	\$14,404.00

**Travel**

Description	Funding	Quantity	Unit Cost	Total Budget
Mid-Atlantic Conference on Child Abuse and Neglect - Lodging	Grant Funds	12	\$148.25	\$1,779.00
Travel Total:				\$1,779.00

**Contractual Services**

Description	Funding	Quantity	Unit Cost	Total Budget
Interpreter	Grant Funds	80	\$40.00	\$3,200.00
Contractual Services Total:				\$3,200.00

**Equipment**

Description	Funding	Quantity	Unit Cost	Total Budget
Laptop Computer	Grant Funds	1	\$2,500.00	\$2,500.00
Equipment Total:				\$2,500.00

**Other**

Description	Funding	Quantity	Unit Cost	Total Budget
Maryland Children's Alliance - Membership	Grant Funds	1	\$300.00	\$300.00
Mid Atlantic Conference on Child Abuse and Neglect - Registration	Grant Funds	11	\$375.00	\$4,125.00
National Children's Alliance - Membership	Grant Funds	1	\$500.00	\$500.00
NCATrak User Fee	Grant Funds	1	\$2,000.00	\$2,000.00
Other Total:				\$6,925.00

**SECTION II. CHANGES:**

No Changes to Project Director  
 No Changes to Fiscal Officer

**Grant Adjustment Notice (for a Budget GAN) Page 2**

No Changes to GOCCP Grant Monitor

No Changes to Fiscal Specialist

No Changes to Funding Manager

No Changes to Start Date

No Changes to End Date

---

**SECTION III. OTHER ADJUSTMENTS & INFORMATION:**

**Processed by:** \_\_\_\_\_

**Approved:** \_\_\_\_\_

Authorized Official Governor's Office of Crime Control and Prevention

**Date:** 9/28/2015

Grant Adjustment Notice (for a General GAN) Page 1 of 1

Governor's Office of Crime Control and Prevention

CACS-2016-1804  
Funding Year  
CFDA: State

GRANT ADJUSTMENT NOTICE

Adjustment No: 3

**TITLE OF PROGRAM:** Child Advocacy Center Services  
**FUNDING AGENCY:** Frederick County, Maryland  
**FUNDING SUBAGENCY:** Frederick County, Maryland  
**FUNDING PERIOD:** 11/01/2015 To 05/31/2016

---

**SECTION I. DEOBLIGATIONS & REOBLIGATIONS:**

Previous Amount of Grant Award	\$14,404.00
Reobligation / Deobligation Amount	\$0.00
Adjusted Amount of Award	\$14,404.00

---

**SECTION II. CHANGES:**

Change Project Director From: Davis, Lynn To: Humelsine, Stacey  
Change Fiscal Officer From: Davis, Lynn To: Marshall, Abigail  
No Changes to GOCCP Grant Monitor  
No Changes to Fiscal Specialist  
No Changes to Funding Manager  
No Changes to Start Date  
No Changes to End Date

---

**SECTION III. OTHER ADJUSTMENTS & INFORMATION:**

Processed by: \_\_\_\_\_  
Approved: \_\_\_\_\_  
Authorized Official Governor's Office of Crime Control and Prevention  
Date: 9/28/2015

**No Budget Changes**

**Personnel changes requested by GAN**

7.8.9 Review Grant Award Reports

Locate the award you wish to review reports for via Grant Management -> Award Search.

Edit	Reports	Grant #	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Project Director	Amount	County	Mod
		BARM-2012-1203	2011-BA-0017	Cecil County Sheriff's Office Law Enforcement Facility	Cecil County Sheriff's Office Law Enforcement Facility	New/Replacement Body Armor	07/01/2011	09/30/2012	Creek, Eric	\$3,703.00	Cecil	Broo
		BIAG-2009-1054	2010-BI-0080	Maryland Department of Public Safety and Correctional Services	Maryland Department of Public Safety and Correctional Services	Crime Intelligence Analyst Program	10/01/2010	05/31/2012	Dioders, Ronald	\$40,000.00	Baltimore County	Eadd
		BIAG-2009-1497	2011-BI-0003	Washington College	Washington College	Maryland Crime Mapping and Analysis	05/01/2011	04/30/2012	Bruce, Stewart	\$320,357.00	Kent	Broo
		BIRA-2009-1154	2009-BB-0296	Maryland Department of Public Safety and Correctional Services	Information Technology & Communications Division	Vine Protective Order System - JRA	01/01/2010	06/30/2012	Bhayankar, Ravi	\$387,669.66	O - State-wide	Litac
		BIRA-2009-1171	2010-BI-0267	Washington College	Washington College	Maryland Offender Management System - JRA2	01/01/2011	04/30/2012	Bruce, Stewart	\$264,247.00	Kent	Broo
		BIRA-2009-1178	2011-BI-0146	Fusion Partnerships, Inc.	Fusion Partnerships, Inc.	Victim Services to Prostituted Women - Bill	10/01/2011	09/30/2012	Robarge, Jacqueline	\$82,334.00	Baltimore City	Mah
		CACS-2012-1208	2011-CH-0012	Queen Anne's County Community Partnerships for Children and Families	Queen Anne's County Community Partnerships for Children and Families	Multi-Disciplinary Training	10/01/2011	09/30/2012	Coppage, Susan	\$12,440.00	Queen Anne's	Broo
		CIAC-2011-1004	2011-CC-0014	University of Maryland, Baltimore - ORD	University of Maryland, Baltimore - ORD	Child Maltreatment Training	10/01/2011	09/30/2012	Dubowitz, Howard	\$37,980.00	Baltimore City	Mah
		CSAF-2011-1005	2011-CS-0001	Maryland State Police	Maryland State Police	Statewide License Plate Reader Expansion - LPRE	03/01/2011	02/29/2012	Stasavage, Linda	\$452,811.00	Baltimore County	Eadd
		CSAF-2012-1436	2011-CS-0014	Havre de Grace Police Department	Havre de Grace Police Department	Violence Prevention Initiative	07/01/2011	06/30/2012	Humphrey, Everett	\$19,000.00	Harford	New
		SOCM-2012-1609	2011-SO-0017	Cecil County Sheriff's Office Law Enforcement Facility	Cecil County Sheriff's Office Law Enforcement Facility	Monitoring Support/Technology Enhancements	07/01/2011	06/30/2012	Creek, Eric	\$20,934.15	Cecil	Broo

Figure 252 - Locate Grant Award in Award Search screen

1. Click on the magnifying glass icon in the Edit column of the Award record.
2. This brings up the Award detail screen with the detailed Grant Menu – click on Reports in the menu.

Edit	View	Report	Period Start	Period End	Status	Submitted	Last Update	Report Type
			07/01/2011	09/30/2011	Reviewed	10/06/2011	10/11/2011	Financial Reports
			10/01/2011	12/31/2011	Reviewed	01/30/2012	02/02/2012	Financial Reports
			01/01/2012	03/31/2012	Reviewed	04/16/2012	04/19/2012	Financial Reports
			04/01/2012	06/29/2012	Reviewed		08/08/2012	Financial Reports
			04/01/2012	06/30/2012	Reviewed	07/16/2012	08/08/2012	Financial Reports

Figure 253 - Access Reports from the Grant Menu

### 7.8.9.1 Review Financial Reports

When you click on Reports from the Grant Menu, then the display panel defaults to Financial Reports. Click on the magnifying glass icon in the View column of the report you wish to review.

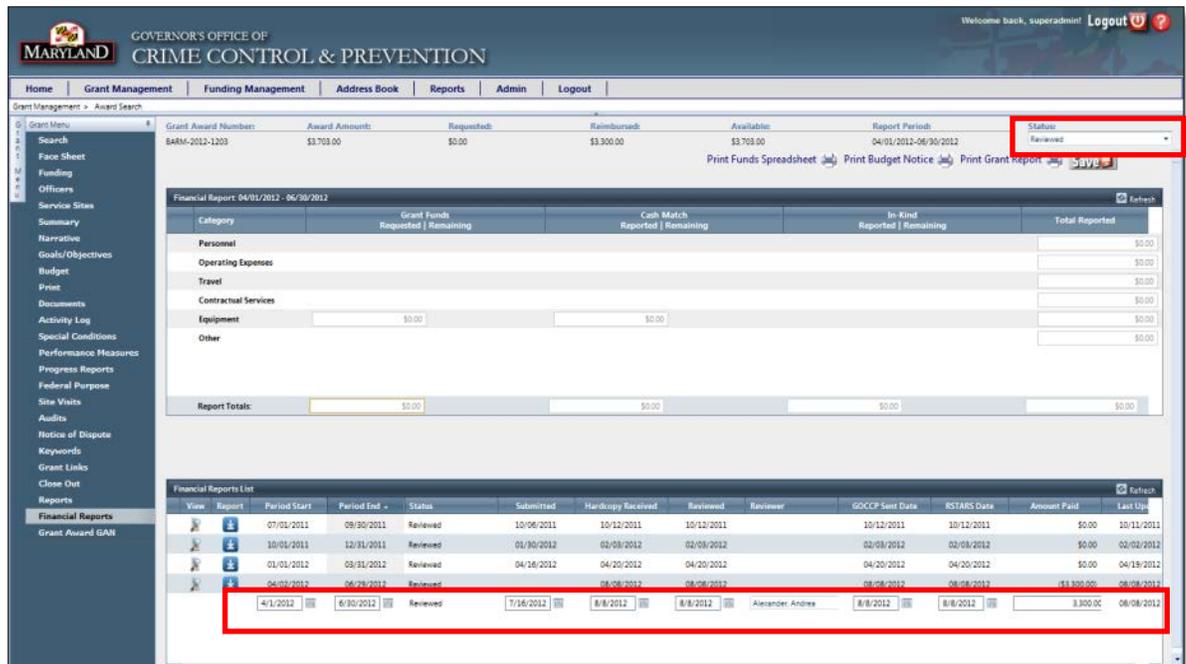


Figure 254 - Review Financial Reports

- Enter the dates for Hard copy received date, GOCCP Sent Date, Amount Paid, and the Reviewer's Name in the lower part of the panel. You can overwrite prepopulated period start and end dates if necessary; the rest of the fields are manually entered. These values should be entered before submitting for review when available.
- When you've reviewed the report and it is satisfactory, click on the Status dropdown menu and select "Reviewed".
- If the review of the report is not satisfactory, click on the Status dropdown menu and select "Return for Revision" and repeat the process until satisfactory. The last update date will be displayed on the right hand side.
- When the State Financial Management Information System (FMIS) reflects payment has been made, go back to the financial report of the relative sub-award (grant) and enter the RSTARS Date. This can be edited in Reviewed status if necessary.



Figure 255 - Return of Revision if necessary

Grant Numbers:	Awarded:	Requested:	Reimbursed:	Available:	Report Periods:	Fin. Rept. Status:
BARM-2012-1203	\$3,703.00	\$0.00	\$0.00	\$3,703.00	01/01/2012-03/31/2012	Reviewed
<b>Contractual Services</b>						\$0.00
<b>Equipment</b>		\$0.00	\$0.00			\$0.00
<b>Other</b>						\$0.00
<b>Slush</b>						\$0.00
<b>TEST</b>						\$0.00
<b>Report Totals:</b>		\$0.00	\$0.00		\$0.00	\$0.00

View	Report	Period Start	Period End	Status	Submitted	Hardcopy Rcvd	Reviewed	Amount Paid	Sent Date	RSTARS Date	Reviewer	Last Update
		07/01/2011	09/30/2011	Reviewed	10/06/2011	10/12/2011	10/12/2011	\$0.00	10/12/2011	10/15/2011	Beier, Michael	11/20/2012
		10/01/2011	12/31/2011	Reviewed	01/30/2012	02/09/2012	02/09/2012	\$0.00	02/09/2012	02/09/2012		02/02/2012
		1/1/2012	3/31/2012	Reviewed	4/16/2012	4/20/2012	4/20/2012	0.00	4/20/2012	4/20/2012		04/19/2012
		04/02/2012	06/29/2012	Reviewed		08/08/2012	08/08/2012	(\$3,300.00)	08/08/2012	08/08/2012		08/08/2012
		04/01/2012	06/30/2012	Reviewed	07/16/2012	08/08/2012	08/08/2012	\$3,300.00	08/08/2012	08/08/2012		08/08/2012

Figure 256 - View financial report details, edit dates or reviewer, see last update column

### 7.8.9.1.1 Generate Grant Modification Request Form

1. Within a grant award, navigate to the Reports, Financial Reports area, and click the magnifying glass icon to view an individual financial report.

Category	Grant Funds Requested   Remaining	Cash Match Reported   Remaining	In-Kind Reported   Remaining	Total Reported
Personnel				\$0.00
Operating Expenses				\$0.00
Travel				\$0.00
Contractual Services				\$0.00
Equipment				\$0.00
Other				\$0.00
<b>Report Totals:</b>	\$0.00	\$0.00	\$0.00	\$0.00

View	Report	Period Start	Period End	Status	Submitted	Hardcopy Rcvd	Reviewed	Amount Paid	Sent Date	RSTARS Date	Reviewer	Last Update
		7/1/2009	9/30/2009	Reviewed	10/10/2009	10/15/2009	10/15/2009	0.00	10/15/2009	10/15/2009		10/15/2009
		10/01/2009	12/31/2009	Reviewed	01/06/2010	01/13/2010	01/25/2010	\$2,879.71	01/14/2010	01/25/2010		01/29/2010

Figure 257 - Select an individual financial report to view

2. Within the financial report, click the printer icon next to the Grant Modification link at the top right of the page to generate a Grant Modification Request.
3. Download the file from your web browser; then save or print from Adobe Acrobat.

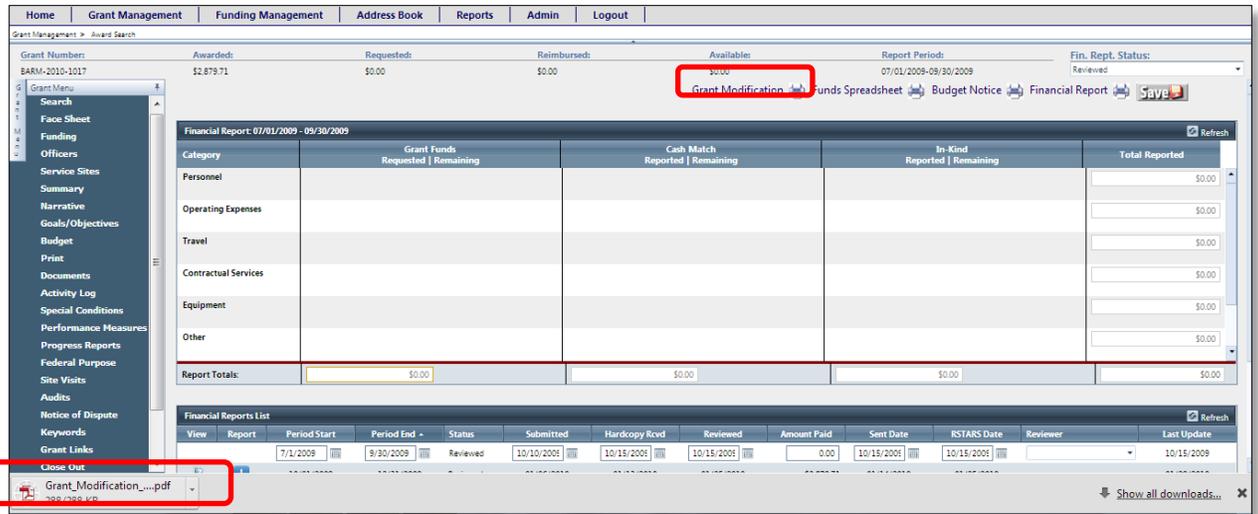


Figure 258 - Generate Grant Modification Form

### 7.8.9.1.2 Generate Grant Budget Notice

1. Within a grant award, navigate to the Reports, Financial Reports area, and click the magnifying glass icon to view an individual financial report.

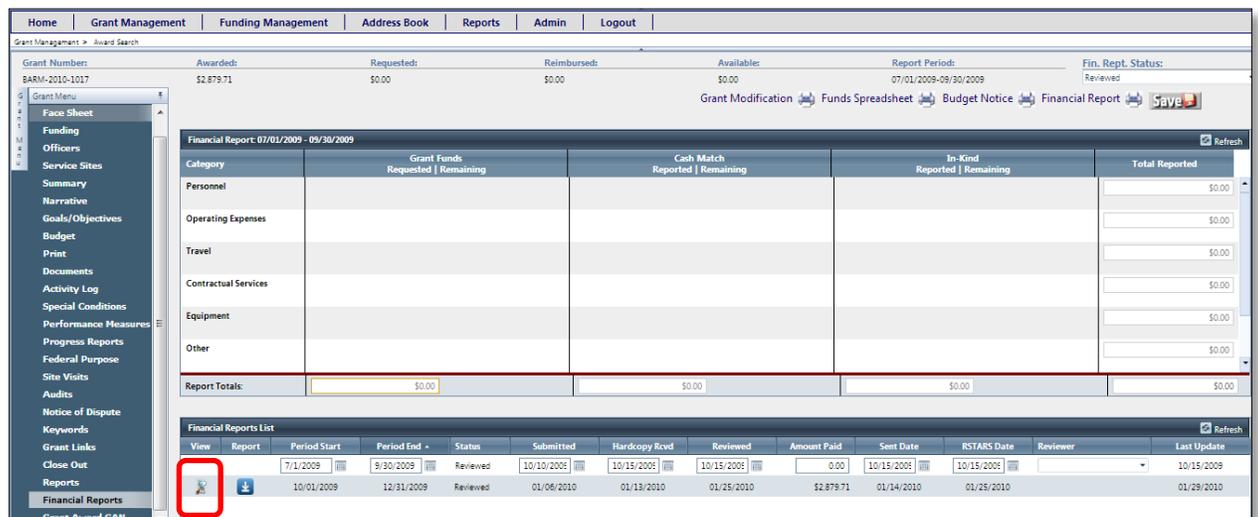


Figure 259 - Select an individual financial report to view

2. Within the financial report, click the printer icon next to the Budget Notice link at the top right of the page to generate a Grant Budget Notice.
3. Download the file from your web browser; then save or print from Adobe Acrobat.

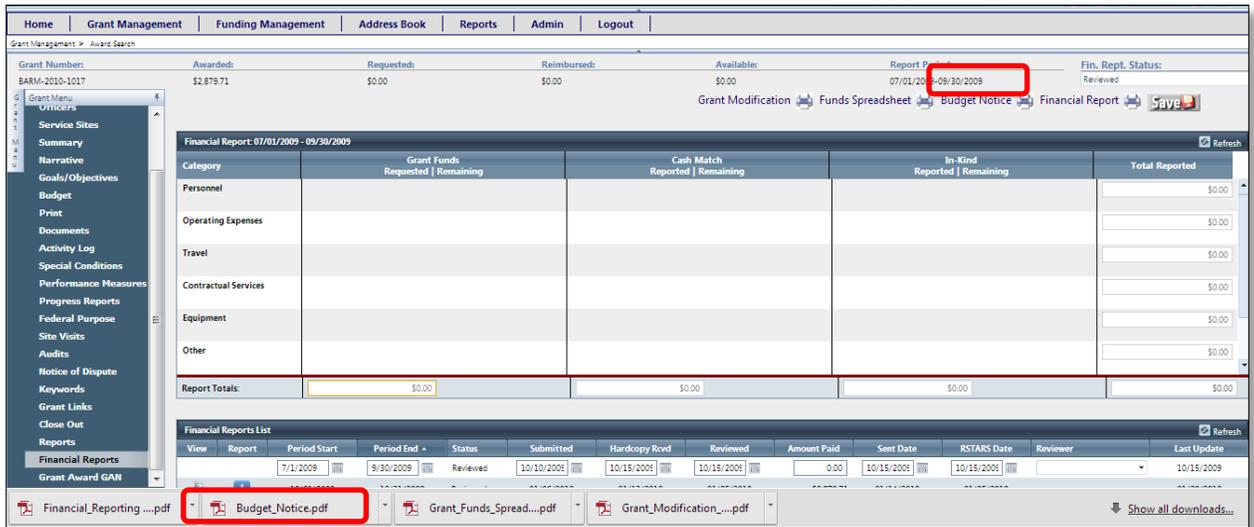


Figure 260 - Generate Budget Notice

### 7.8.9.1.3 Generate Funds Spreadsheet

1. Within a grant award, navigate to the Reports, Financial Reports area, and click the magnifying glass icon to view an individual financial report.

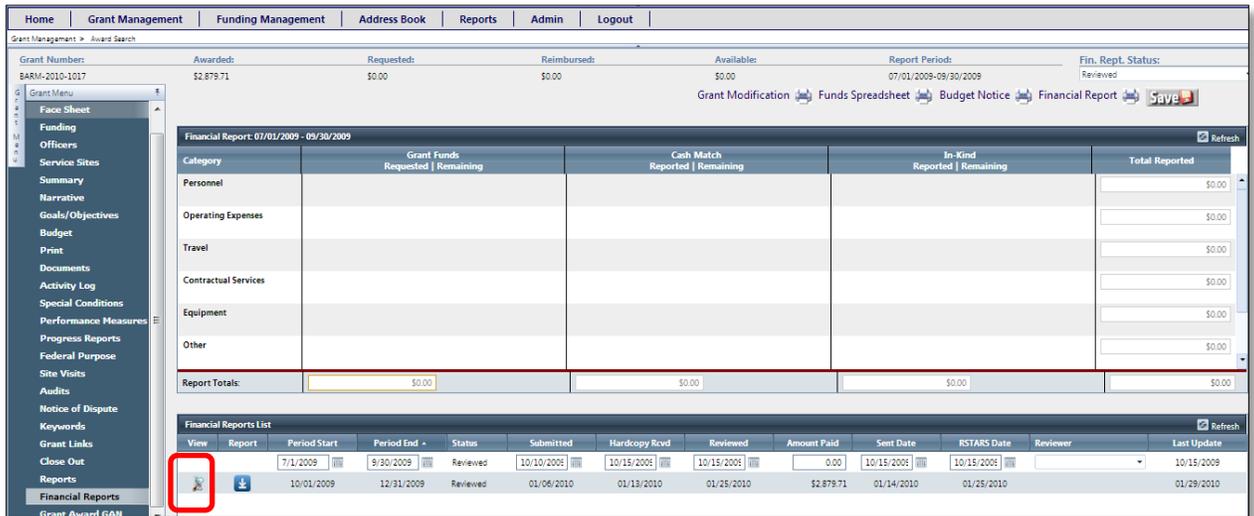


Figure 261 - Select an individual financial report to view

2. Within the financial report, click the printer icon next to the Funds Spreadsheet link at the top right of the page to generate a Grant Funds Spreadsheet.
3. Download the file from your web browser; then save or print from Adobe Acrobat.

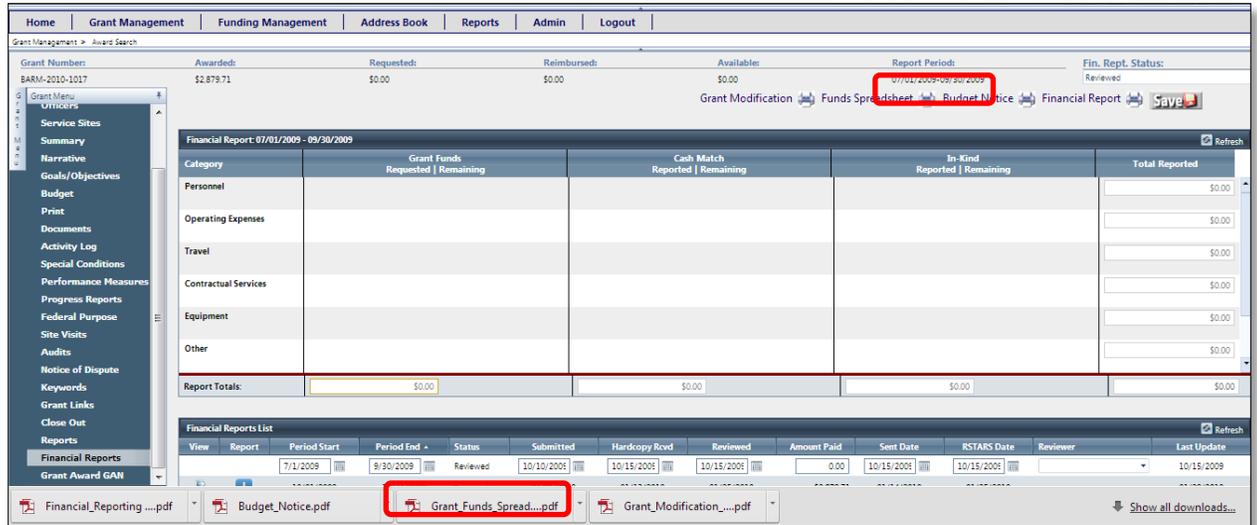


Figure 262 - Generate Grant Funds Spreadsheet

### 7.8.9.2 Review Progress Reports

1. Click Reports in the Grant Menu to return the display screen to the report type listing.
2. Click the blue-highlighted Progress Reports bar to expand the list of reports filed for this category.

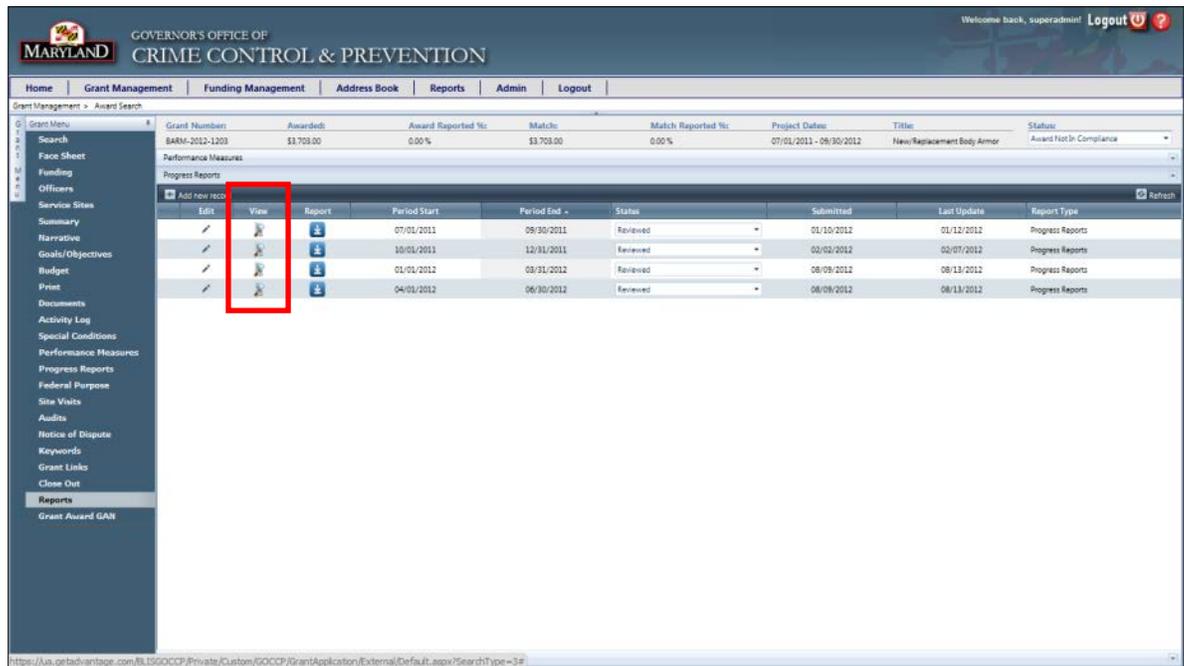


Figure 263 - Select Progress Reports

3. One can insert a new progress report; the period start and end dates are prepopulated but can be overwritten; all other fields are manually entered and should be entered before submitting for review. Last Update field is always system generated based on user actions saved.

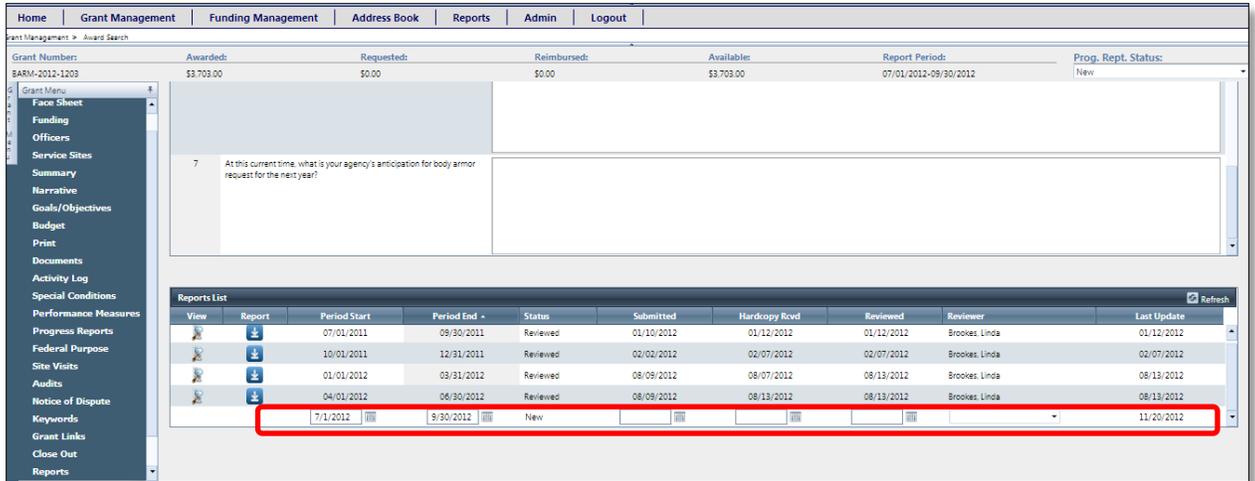


Figure 264 - View progress report details, edit dates, and see last update column

- Click on the magnifying glass icon in the View column of the Progress Report you wish to review.

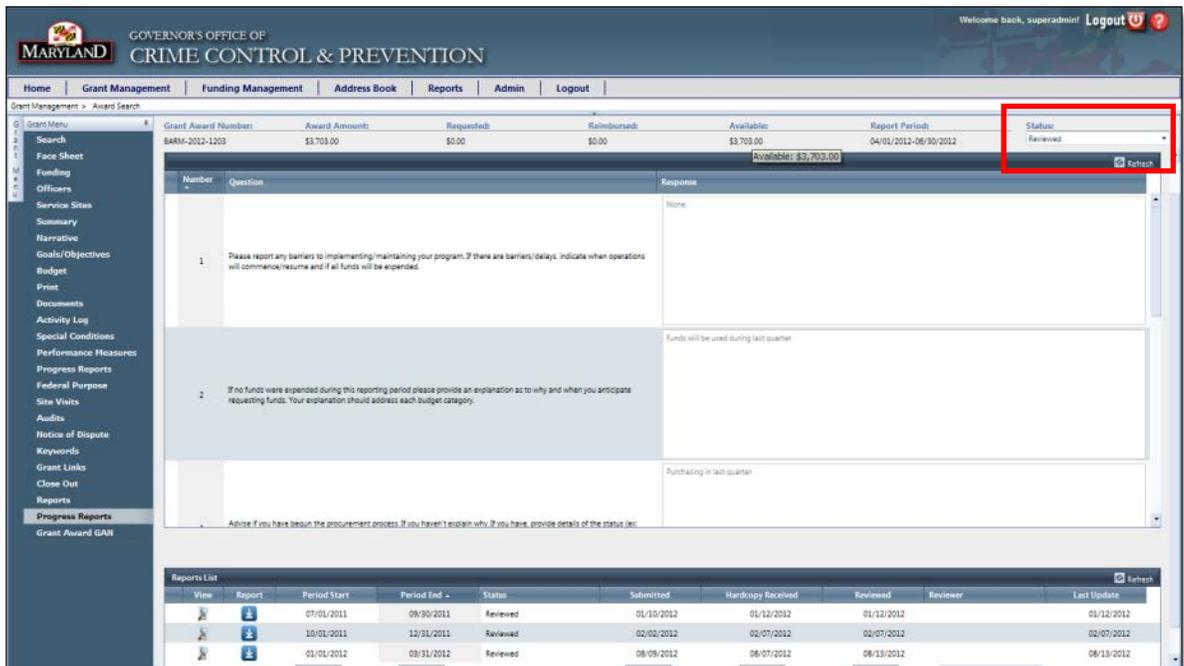


Figure 265 - Review Progress Report

- When you've reviewed the report and it is satisfactory, click on the Status dropdown menu and select "Reviewed".
- If the review of the report is not satisfactory, click on the Status dropdown menu and select "Return for Revision" and repeat the process until satisfactory.

### 7.8.9.3 Review Performance Measures

- Click Reports in the Grant Menu to return the display screen to the report type listing.

- Click the blue-highlighted Performance Measures bar to expand the list of reports filed for this category.

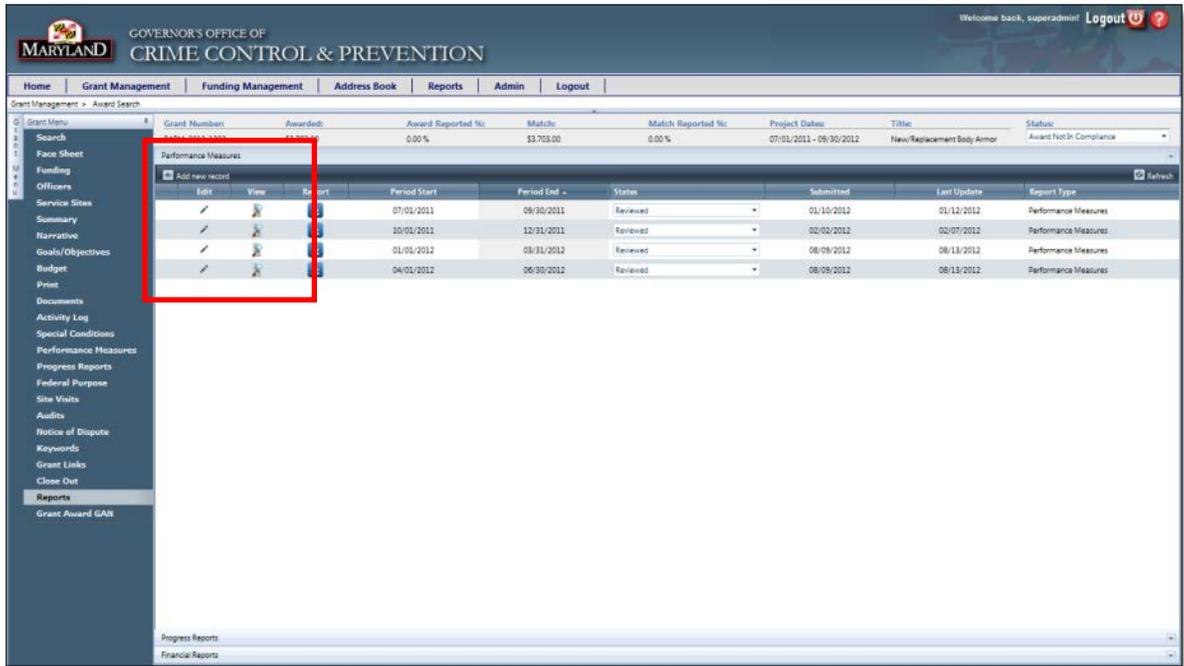


Figure 266 - Select Performance Measures

- Click on the magnifying glass icon in the View column of the Progress Report you wish to review.

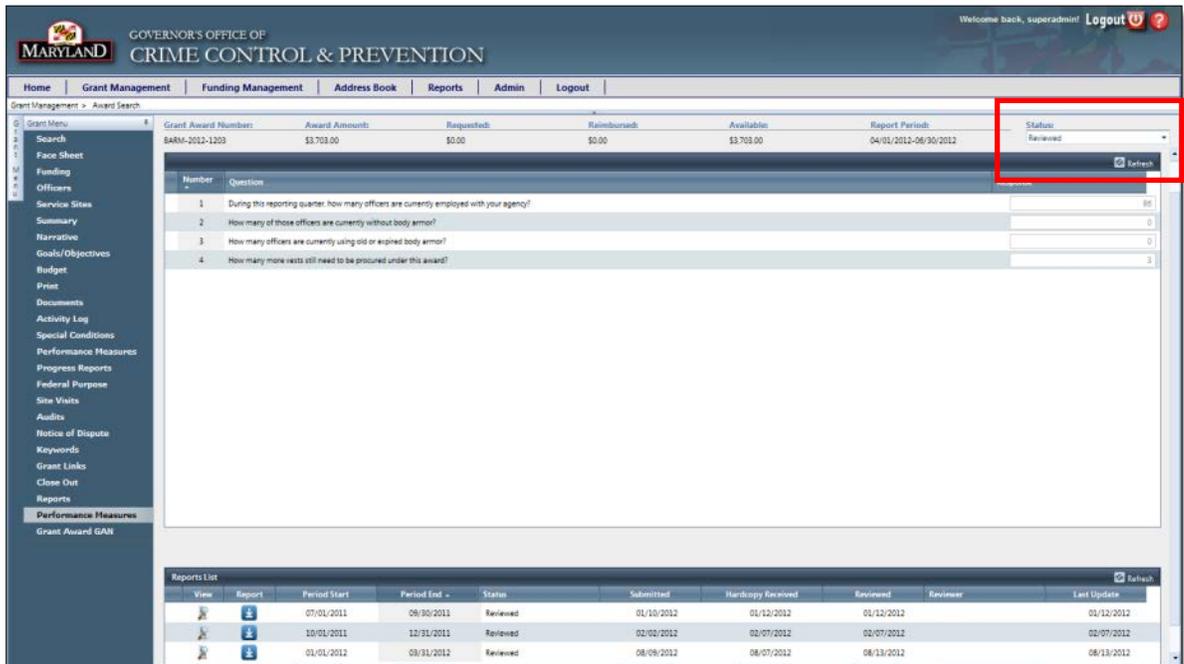


Figure 267 - Review Performance Measures

- One can insert a new performance measure; the period start and end dates are prepopulated but can be overwritten; all other fields are manually entered and should be entered before submitting for review. Last Update field is always system generated based on user actions saved.

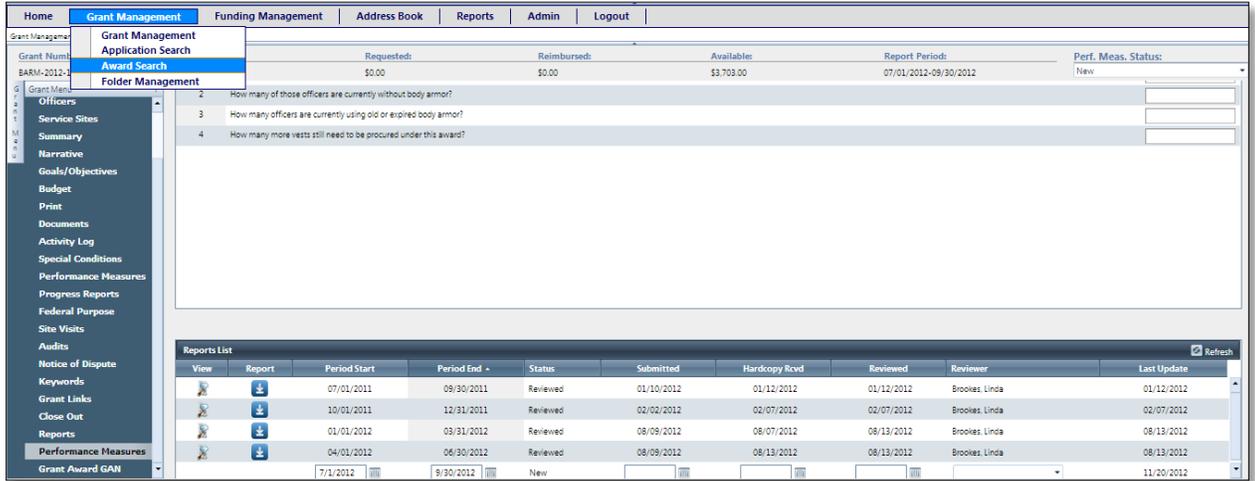


Figure 268 -View performance measure details, edit dates, and see last update column

- When you've reviewed the report and it is satisfactory, click on the Status dropdown menu and select "Reviewed".
- If the review of the report is not satisfactory, click on the Status dropdown menu and select "Return for Revision" and repeat the process until satisfactory.

### 7.8.10 Create a Grant Award Grant Adjustment Notice (GAN) (Accessibility based on Permissions)

Manage Grant Adjustment Notices (GANs) in this screen. Grant modification requests that have been submitted, reviewed and approved will be entered into the system and managed using this interface.

To add a new GAN:

- Click on Add New Record
- Enter the required data in the date approved and all other fields that apply: ReOb/DeOb funds, personnel changes FY start or end date changes, or other notes. Click Insert to add, or cancel to not add.

GAN "ADD NEW RECORD" FIELDS	
GAN Number	This is a display-only field. GMS automatically assigns a unique GAN number to a new GAN record.
Date Approved	Enter the date this GAN was approved.
Last Update	This is a display-only field. The date of the last update to this GAN record is displayed in this field.
<b>Budget Changes</b>	
<b>Funding Year</b>	
REOB/DEOB Amount	Enter the dollar amount of the REOB/DEOB funding for this GAN.
Old Value	Display only: Displays the original total dollar amount allocated to this Grant Award.

New Value	Display only: Displays the new total dollar amount allocated to this Grant Award after the REOB/DEOB amount is entered.
Available DEOB	Display only: Displays the available DEOB dollar amount.
Available REOB	Display only: Displays the available REOB dollar amount.
<b>Personnel and Date Changes</b>	
<b>Project Director</b>	
Old Value	Display only: Displays the person currently assigned to the Project Director role for this Grant Award.
New Value	Select the new Project Director from the drop-down list.
<b>GOCCP Monitor</b>	
Old Value	Display only: Displays the GOCCP staff member currently assigned to the Regional Monitor role for this Grant Award.
New Value	Select the new GOCCP Regional Monitor from the drop-down list.
<b>Start Date</b>	
Old Value	Display only: Displays the original Start Date of the Grant Award.
New Value	Enter the new Start Date for this Grant Award.
<b>End Date</b>	
Old Value	Display only: Displays the original End Date of the Grant Award.
New Value	Enter the new End Date for this Grant Award.
Other Adjustments	This is a free-form text field. Enter any other miscellaneous adjustments or amendments to the Grant Award based on this GAN.
Insert/Cancel	After entering the required information for this GAN, click on the <b>Insert</b> button to save the record or click the <b>Cancel</b> button to cancel adding this GAN. If you hit the Cancel button, your changes will be lost.

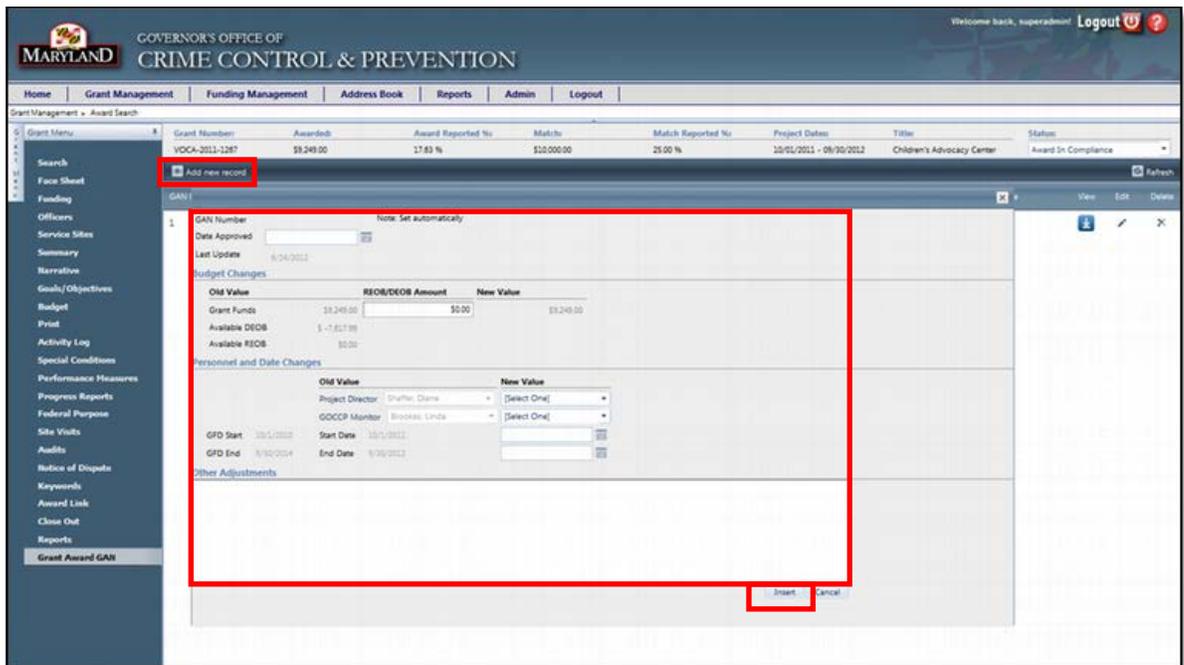


Figure 269 – Insert a new Grant Award Grant Adjustment Notice (GAN)

- Click on the Insert button. The GAN is assigned a GAN # after it is approved; before approval it will have a GAN# of zero (0).

### 7.8.11 Modifying Grant Award Grant Adjustment Notices (GANs)

If there are multiple versions of the GANs against a single grant award, you will see the most recent one on top; ordered numerically.

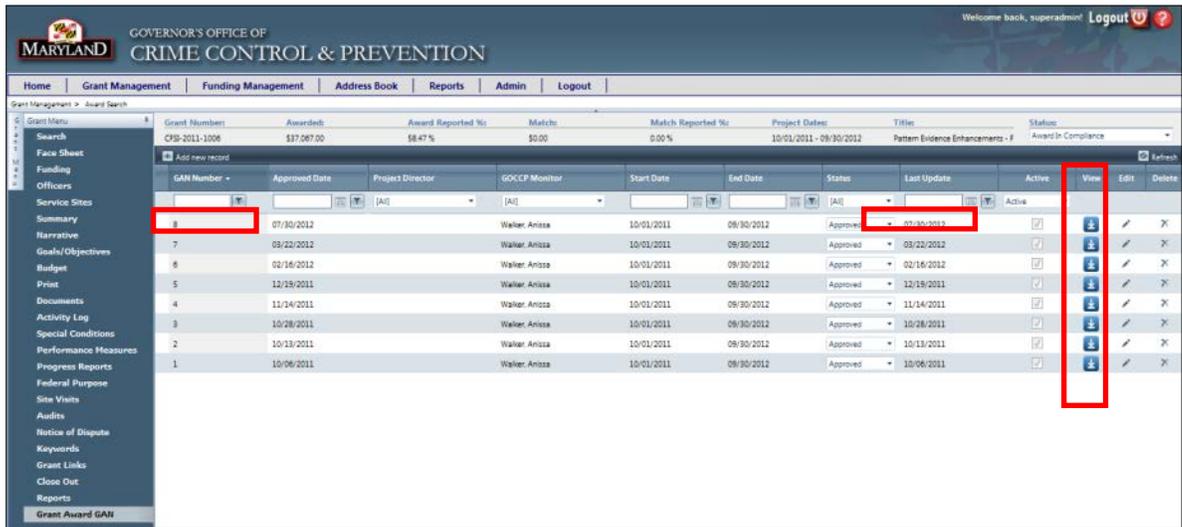


Figure 270 - Selecting a GAN to edit from List

- You can edit each by clicking the Pencil Icon. Please note that GANs can only be edited while in status 'New'. If they are status 'Approved' – clicking on the Pencil Icon will allow the user to view the data in read-only format.

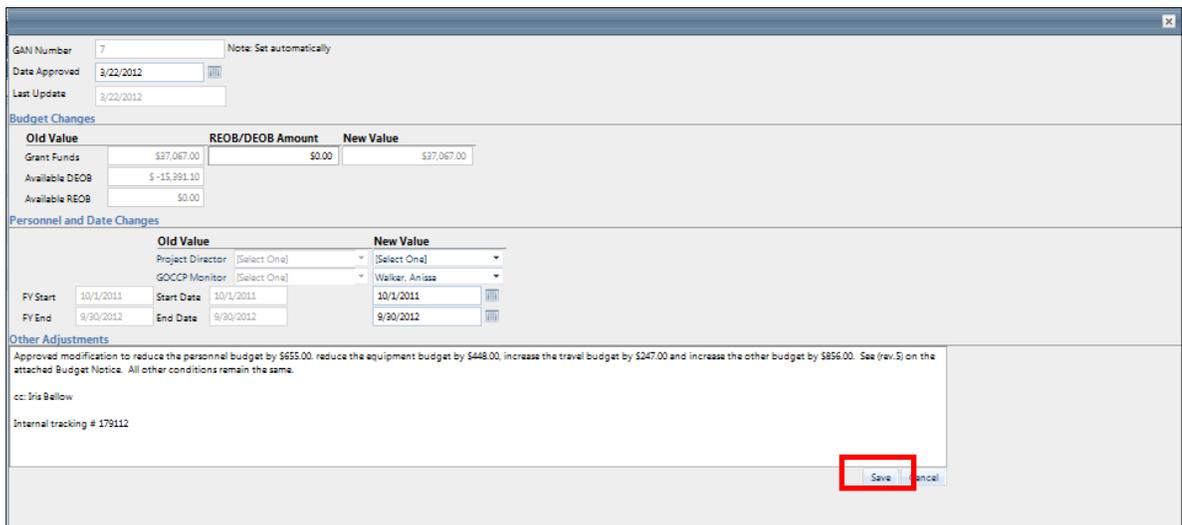


Figure 271 - Modify an existing GAN

- To approve the GAN, click on the Status drop-down list and select Approved. It is only after a GAN is approved that the changes made on the data entry form are applied to the grant award.



Figure 272 – Approve a GAN

### 7.8.12 Printing Grant Award Grant Adjustment Notices (GANs)

You can print each GAN by clicking the View icon to download to your local hard drive or print.

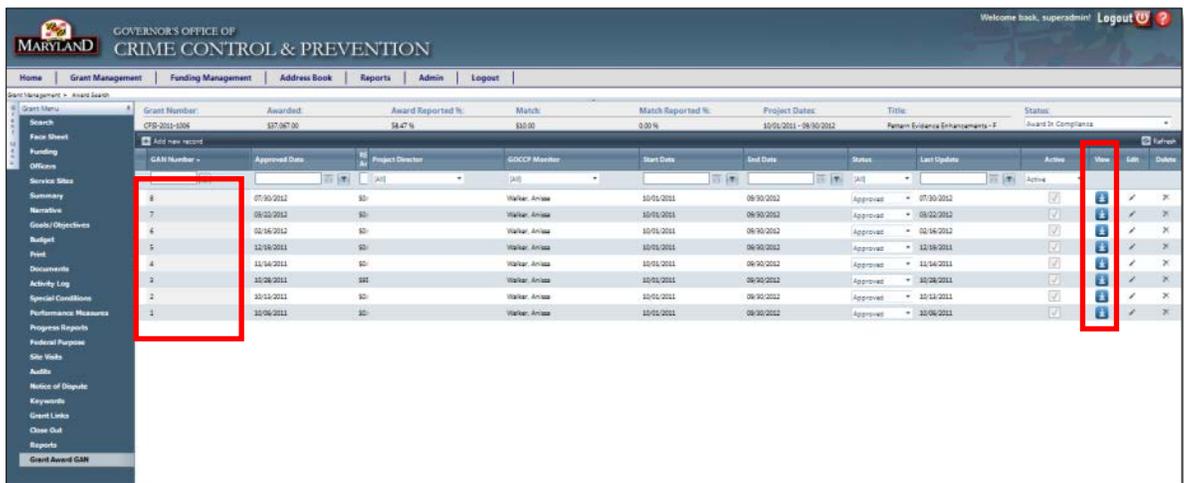


Figure 273 - Grant Award GAN print or download.

### 7.8.13 Close Out a Grant Award

The Close Out page provides a list of questions to be answered at the conclusion of the Award.

1. Select Close Out from the Grant Menu

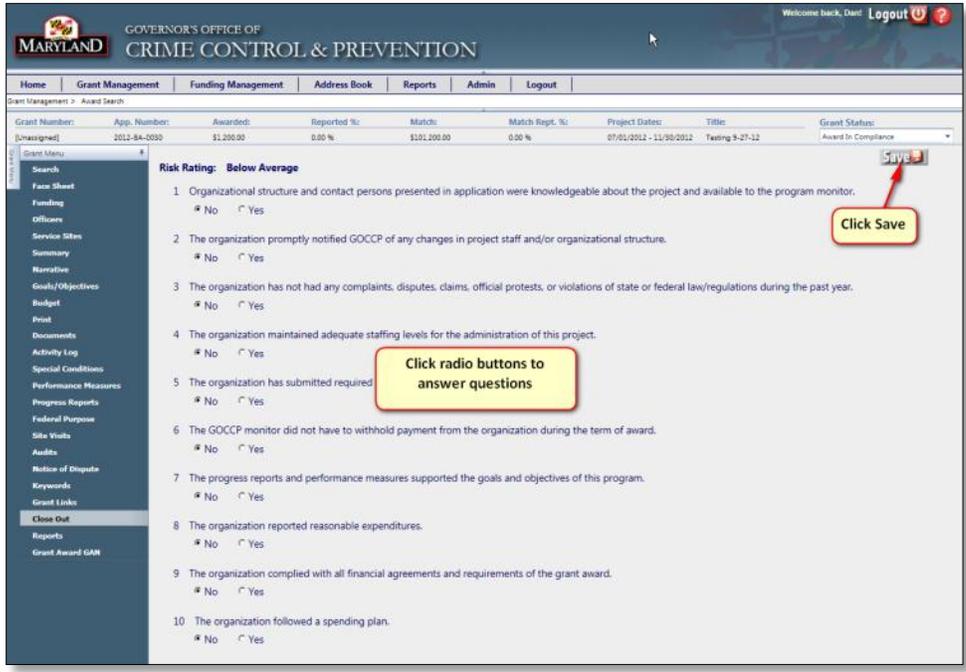


Figure 274 - Grant Award Closeout Screen

2. Answer each question by clicking on the Yes or No radio button beside each
3. Click the SAVE button
4. Click on the Grant Status drop-down menu and select Complete Closeout Process



Figure 275 - Grant Award Closeout Screen

5. Print the Close Out Form by clicking on Print in the Grant Menu and selecting Grant Award Close Out from the drop-down list.



Figure 276 – Print Grant Award Close Out Form

6. Submit sub-award (grant) folder and signed Close Out form to the Control Desk for assignment to the appropriate Fiscal Specialist.

## 7.9 Folder Management

The Folder Management feature of GMS allows you to track the location of the physical folders that contain hardcopies of grant awards through an electronic check-in and check-out system.

Access the Check-In and Check-Out features by selecting Folder Management from the Grant Management menu:

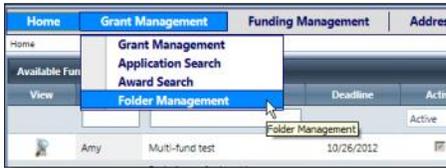


Figure 277 - Access the Folder Management Screen

The Folder Management screen is displayed:



Figure 278 - GMS Folder Management Screen

### 7.9.1 Check-Out Folders

1. If it is not already highlighted, click on the Check-Out tab. Click the drop-down box next to Select Employee and select a name from the list.
2. After selecting an employee, the Grant Award # text box appears.

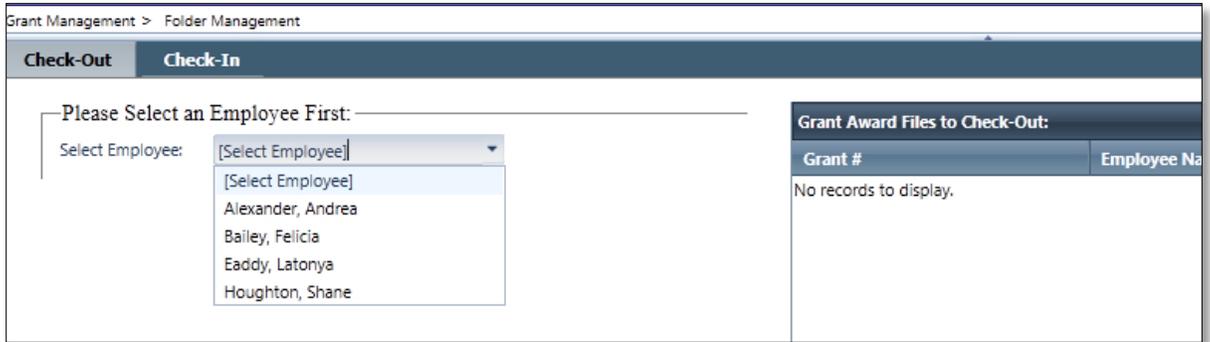


Figure 279 - Click Check-Out

3. Enter the Grant Award number in the text box beside Grant Award # and press the Enter Key.



Figure 280 - Enter Grant Award Number and Press the Enter Key

- NOTE: If you are using a barcode scanner, establish your cursor by clicking once inside the Grant Award # text box, and then proceed with scanning.

4. The Grant Award is added to the Grant Award Files to Check Out screen.



Figure 281 - Grant Award added to Check-Out List

- Repeat this process for each Grant Award you want to check out. When you finish adding items to the list, click on the Save icon to check the files out. NOTE: If you do not click Save, you will lose your selections and the award files will not be checked out.



Figure 282 - Click Save icon to Check Out Files

## 7.9.2 Check-In Folders

- Click on the Check-In tab.



Figure 283 - Click the Check-In Tab

- Enter the Grant Award number in the text box beside Grant Award # and press the Enter Key.



Figure 284 - Enter Grant Award Number and Press the Enter Key

- NOTE: If you are using a barcode scanner, establish your cursor by clicking once inside the Grant Award # text box, and then proceed with scanning.
- The Grant Award is added to the Grant Award Files to Check In screen.



Figure 285 - Grant Award added to Check-Out List

- Repeat this process for each Grant Award you want to check in. When you finish adding items to the list, click on the Save icon to check the files in. NOTE: If you do not click Save, you will lose your selections and the award files will not be checked in.



Figure 286 - Click Save icon to Check In Files

## 8 Address Book

### 8.1 Introduction

The GMS Address Book contains two databases – Organizations and Contacts:

1. The Organizations database is a central repository of all information about organizations that provide, utilize, or relate to Grant and Funding activities in GMS.

Edit	Name ^	Type	Auth. Official	Phone	Address	Federal ID	County	Active	Grants	Delete
	<input type="text"/>	[All]	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	[All]	Active		
	100 Good Men	Non-Profit Non-Religious	Taylor, Edward	(410) 543-4663	650 Fitzwater Street P.O. Box 3743 Salisbury, MD 21802-3743	52-2002447	Wicomico	<input checked="" type="checkbox"/>		
	4-H Teen Leaders in Action	Non-Profit Non-Religious	Brooks, Leon	(301) 868-9636	1500 Merrimac Drive Hyattsville, MD 20783	521422111	Prince George's	<input checked="" type="checkbox"/>		
	A.C.T. Activity Community Teams	Non-Profit Non-Religious	Martin, James	(410) 325-1902	4404 Moravia Road Baltimore, MD 21206	03-0432907	Baltimore City	<input checked="" type="checkbox"/>		
	A.S.K., Inc. (Achieving Success through Knowledge)	Non-Profit Non-Religious	Wright, Christopher	(410) 383-9633	3200 Walbrook Avenue Baltimore, MD 21216	52-2268276	Baltimore City	<input checked="" type="checkbox"/>		
	Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(410) 547-1300	111 South Calvert Street, Suite 2300 Baltimore, MD 21202-6174	52-6036106	Baltimore City	<input checked="" type="checkbox"/>		

Figure 287 - Address Book Organizations Database

2. The Contacts database stores information for all individual contacts that are associated with Organizations, Programs, Grants or Funding Sources in GMS.

Edit	Contact Name ^	Organization Name	Job Title	Phone	Fax	Email	Active	Delete
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Active	
	4a, RegressionUser	Aberdeen Police Department	Regression User	(410) 272-2121			<input checked="" type="checkbox"/>	
	6a, RegressionUser	Aberdeen Police Department	Regression User	(410) 272-2121			<input checked="" type="checkbox"/>	
	Abadia, Judy	Bureau of Governmental Research	Financial Coordinator	(301) 403-4403		jabadia@bgr.umd.dbu	<input checked="" type="checkbox"/>	
	Abaidoo, Kendra Watts	Ashburton Area Association, Inc.	President	(410) 664-7899		kendra.abaidoo@verizon.net	<input checked="" type="checkbox"/>	
	Abbott, Debbie	Town of Hurlock	Fiscal Officer	(410) 943-4181	(410) 943-8556	information@hurlockmd.net	<input checked="" type="checkbox"/>	
	Abbott, Doug	Carroll County Sheriff's Office	Fiscal Coordinator	(410) 386-2405	(410) 876-1152	dabbott@ccg.carr.org	<input checked="" type="checkbox"/>	
	Abbott, Douglas	Carroll County Board of County Commissioners	Fiscal Coordinator	(410) 386-2405	(410) 876-1152	dabbott@ccg.carr.org	<input checked="" type="checkbox"/>	

Figure 288 - Address Book Contacts Database

All information pertaining to Organizations and Contacts is added and updated via the Address Book in GMS. An organization or contact must be stored in these databases in order to be associated with grant applications and awards or funding programs.

3. In the Contacts database, you can associate an Organization with a contact.
4. Similarly, in the Organizations database, you can assign one or more contacts from the Contacts database to any given organization.

### 8.2 Organizations

Access the Organizations database by selecting Organizations from the Address Book menu:

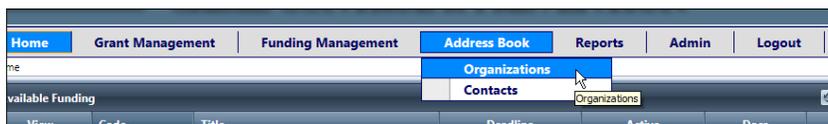


Figure 289 - Address Book -> Organizations

The Organizations screen is displayed:

Edit	Name	Type	Auth. Official	Phone	Address	Federal ID	County	Active	Grants	Delete
	100 Good Men	Non-Profit Non-Religious	Taylor, Edward	(410) 543-4663	650 Fitzwater Street P.O. Box 3743 Salisbury, MD 21802-3743	52-2002447	Wicomico	☑	↓	✕
	4-H Teen Leaders in Action	Non-Profit Non-Religious	Brooks, Leon	(301) 868-9636	1500 Merrimac Drive Hyattsville, MD 20783	521422111	Prince George's	☑	↓	✕
	A.C.T. Activity Community Teams	Non-Profit Non-Religious	Martin, James	(410) 325-1902	4404 Moravia Road Baltimore, MD 21206	03-0432907	Baltimore City	☑	↓	✕
	A.S.K., Inc. (Achieving Success through Knowledge)	Non-Profit Non-Religious	Wright, Christopher	(410) 383-9633	3200 Walbrook Avenue Baltimore, MD 21216	52-2268276	Baltimore City	☑	↓	✕
	Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(410) 547-1300	111 South Calvert Street, Suite 2300 Baltimore, MD 21202-6174	52-6036106	Baltimore City	☑	↓	✕
	Aberdeen Community Action Coalition	Non-Profit Non-Religious	Lucas, Jo	(410) 272-3500	P.O. Box 142 Aberdeen, MD 21001		Harford	☑	↓	✕
	Aberdeen Police Department	Local Government	Tablet, Henry	(410) 272-2121	80 North Park Street Aberdeen, MD 21001-9998	52-6000957	Harford	☑	↓	✕
	About Face Program - Maryland National Guard	State Agency	Dannyer, Robert	(410) 702-9883	13620 Meade Argonne Circle Reston, VA 20196	52-6020333	Baltimore County	☑	↓	✕
	Abraham's Bosom, Inc.	Non-Profit Religious	Palmer, Antonio	(410) 268-4200	Annapolis Church of God 84 Janual Street Annapolis, MD 21403	31-1677577	Anne Arundel	☑	↓	✕
	Academy Heights Civic Association	Non-Profit Non-Religious	Pfizer, Al		6140 Regent Park Road Catonsville, MD 21228	52-6043251	Howard	☑	↓	✕
	Academy of Success and Potential, The	Non-Profit Non-Religious	Janey, Linda	(410) 362-9200	125 North Wilson Street Baltimore, MD 21209	52-2029641	Baltimore City	☑	↓	✕
	Academy of Purpose, Inc.	Non-Profit Non-Religious	Barton, Joel	(410) 949-9502	P.O. Box 20548 Baltimore, MD 21223	52-2184518	Baltimore City	☑	↓	✕
	Academy of the Holy Cross	Non-Profit Religious	O'Connell, Barbara	(301) 963-7954	Home and School Association 4820 Strathmore Avenue Kingingston, MD 20885	52-0883113	Montgomery	☑	↓	✕
	Accident Community Planning Group	Non-Profit Non-Religious	Spencer, Deborah	(301) 786-6280	2942 Bumble Bee Road Accident, MD 21030	52-1878759	Garrett	☑	↓	✕
	Action Village Homeowners Association	Non-Profit Non-Religious	McFarlane, Kurt	(301) 843-4111	3353 Old Washington Road Wadon, MD 20622-3204	52-1301117	Charles	☑	↓	✕
	ACTS, Inc.	Non-Profit Non-Religious	Chotkai, Diane	(410) 625-8773	40 East Burke Avenue Baltimore, MD 21206	52-1578463	Baltimore County	☑	↓	✕
	Addiction Connections Resource, Inc.	Non-Profit Non-Religious	Williams, Linda	(410) 879-1548	3609 Oakbury Court Jarrettsville, MD 21084	52-2238274	Harford	☑	↓	✕
	Administrative Office of the Courts	Judiciary	Broccolina, Frank	(410) 260-3419	Maryland Judicial Center 580 Taylor Avenue Annapolis, MD 21401-3392	52-6002033	Anne Arundel	☑	↓	✕
	Administrative Office of the Courts - Court of Special Appeals	Judiciary	Krauser, Peter	(410) 260-3419	Robert C. Murphy Court of Appeal Building 361 Rowe Boulevard Annapolis, MD 21401	52-6002033	Anne Arundel	☑	↓	✕

Figure 290 - The Organizations Screen

From this screen, you can:

1. View all the available Organizations that can apply for or supply a Grant
2. Search for an Organization
3. View Contacts, Grants, and Documents associated with an Organization
4. Add Contacts to an Organization
5. Add a new Organization
6. Edit an Organization
7. Delete an Organization

Edit	Name	Type	Auth. Official	Phone	Address	Federal ID
	100 Good Men	Non-Profit Non-Religious	Taylor, Edward	(410) 543-4663	650 Fitzwater Street P.O. Box 3743 Salisbury, MD 21802-3743	52-2002447
	4-H Teen Leaders in Action	Non-Profit Non-Religious	Brooks, Leon	(301) 868-9636	1500 Merrimac Drive Hyattsville, MD 20783	521422111
	A.C.T. Activity Community Teams	Non-Profit Non-Religious	Martin, James	(410) 325-1902	4404 Moravia Road Baltimore, MD 21206	03-0432907
	A.S.K., Inc. (Achieving Success through Knowledge)	Non-Profit Non-Religious	Wright, Christopher	(410) 383-9633	3200 Walbrook Avenue Baltimore, MD 21216	52-2268276
	Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(410) 547-1300	111 South Calvert Street, Suite 2300 Baltimore, MD 21202-6174	52-6036106

Figure 291 - GMS Organization Fields

The following columns of information are displayed for each organization record:

1. Organization Name
2. Type of Organization – Funding Organization by type, Grantee or Prime Recipient
3. Authorized Official – Last Name, First Name
4. Organization Phone Number
5. Address (Street, City, State, Zip)
6. Federal ID

7. County
8. Active Status

Three action columns are also included in this view:

1. **Edit:** Click the pencil icon in this column to edit the information for an organization
2. **Grants:** Click the icon in this column to download a PDF file that lists any grant awards this organization has received.
3. **Delete:** Click the X icon in this column to delete an organization from the database. Contacts which were part of this organization will still exist but will no longer be linked to the deleted organization. Awards or applications which had listed the organization before it was deleted will still do so, but the organization will no longer be assignable for applications, awards or contacts.

### 8.2.1 Expand and View an Organization Record

Scroll through the list and use the search/filter fields to locate the organization you wish to view. Refer to the section *Sorting, Filtering, and Searching for Records* for help with sorting, filtering, and searching for records.

1. When you locate the organization you want to view, click the expand icon to the left of the record.

>		Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(41)
>		Aberdeen Community Action Coalition	Non-Profit Non-Religious	Lucas, Jo	(41)
>		Aberdeen Police Department	Local Government	Trabert, Henry	(41)

Figure 292 - Expand Organization Record

2. Organization information is displayed in tabs beneath the expanded record.

The screenshot shows the 'GOVERNOR'S OFFICE OF MARYLAND CRIME CONTROL & PREVENTION' website. The 'Address Book > Organizations' section is active. The 'Aberdeen Police Department' record is expanded, showing details such as 'Local Government', 'Trabert, Henry', '(410) 272-2121', and '60 North Parke Street, Aberdeen, MD 21001-9998'. Below the organization details, there are tabs for 'Contacts', 'Grants', and 'Documents'. The 'Contacts' tab is selected, displaying a list of contacts with columns for Name, Contact Type, and Job Title. The contacts listed include '4a. RegressionUser', '6a. RegressionUser', 'Cox, Kenneth', 'Laucher, Jim', 'Rudy, Randy', 'Severn, Albert', 'Trabert, Henry', and 'Wilson, Linda'. The 'Trabert, Henry' contact is highlighted in red.

Figure 293 - Expanded Organization Record

### 8.2.1.1 Expanded Organization Record – Contacts Tab

Upon expanding an organization record, the Contacts tab is displayed by default. This tab displays a record for each contact that is associated with the expanded organization.

Name	Contact Type	Job Title	Edit	Delete
4a, RegressionUser		Regression User	✎	✕
6a, RegressionUser		Regression User	✎	✕
Cox, Kenneth		Captain	✎	✕
Laucher, Jim		Project Writer	✎	✕
Rudy, Randy		Chief of Police	✎	✕
Severn, Albert		Administrative Sergeant	✎	✕
Trabert, Henry		Chief of Police	✎	✕
Wilson, Linda		Director of Finance	✎	✕

Figure 294 - Organization Record - Contacts Tab

The following columns are shown for each contact associated with the organization:

1. Name
2. Contact Type
3. Job Title

The following action columns are also displayed:

1. **Edit:** Click on the pencil icon in this column to edit the details of a contact.
2. **Delete:** Click the X in this column to delete a contact from the organization. This does not delete the contact from GMS or the Contacts database – it only deletes the association of the contact to the organization.

#### 8.2.1.1.1 Add a Contact to an Organization

You can add a contact from the GMS Contacts database to an organization. Note: Adding a new Contact requires that the Contact exist in the Contact Directory. If not, then the Contact should be added to the Contact Directory first, and then added as a Contact to the Organization record. If the checkbox for Employer is selected, and the Start Date is entered, then the organization's address record will be included within the contact's record.

Click to add a new contact to an organization.

Click to Save.

Figure 295 - Add a Contact to an Organization

1. Click on Add New Record at the top of the Contact tab.
2. Either select a Contact Name from the drop-down menu or begin to enter a Contact Name into Name box.
3. Enter a Job Title.

4. Enter the Start and End Date (if known) for the Contact. This information is important if a point of contact changes jobs but will still be participating with a grant's implementation.
5. The employer checkbox indicates if this person is an employee. It also updates the contact's address, phone and organization tabs to include the organization's values in each area as part of their own.



Figure 296 - Contact Record when Employer checkbox is checked



Figure 297 - Contact Record when Employer checkbox is not checked

6. Click on the checkmark icon in the lower right hand corner to save the contact record.

### 8.2.1.1.2 Edit a Contact Associated with an Organization

You can edit certain information about a contact from within the Organization database, including their Job Title, Employer status, Start Date, and End Date.

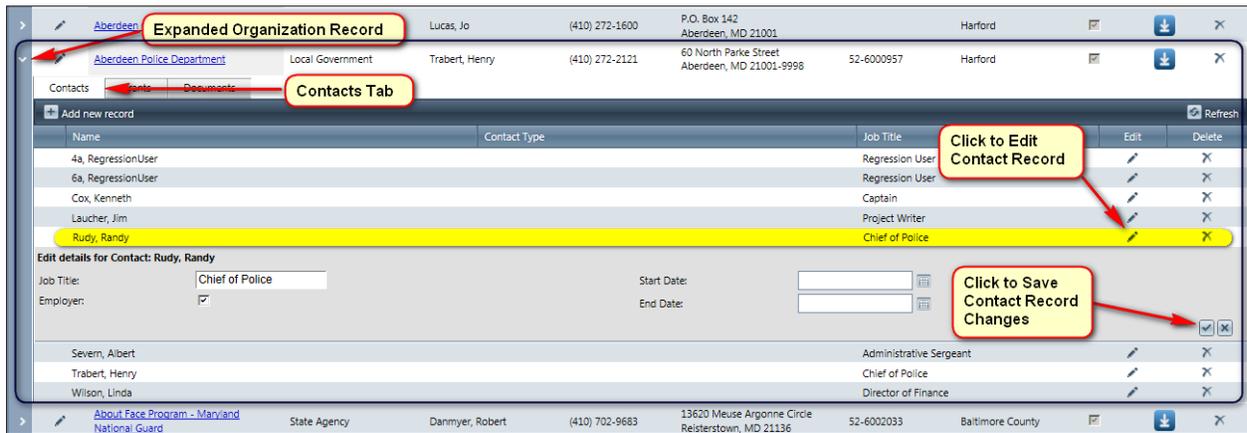


Figure 300 - Edit an Organization's Contact

1. Locate the contact you wish to edit and click on the pencil icon in the Edit column.
2. Make any appropriate changes to the contacts data.
3. Click on the checkmark icon in the lower right hand corner to save your changes, or click on the X button beside the checkmark to cancel the edit.

### 8.2.1.1.3 Delete a Contact from an Organization

You can delete a contact from an organization. The contact will remain in the GMS Contacts database, but will no longer be associated with the organization.

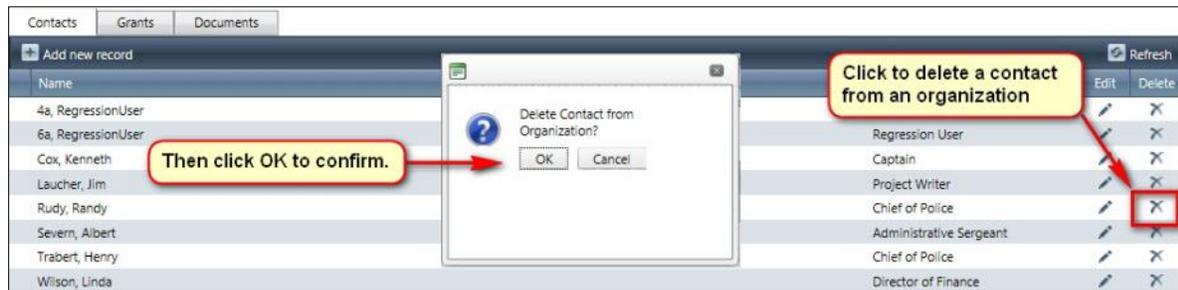


Figure 301 - Delete a Contact from an Organization

1. Locate the contact you wish to delete from the organization and click on the X icon in the Delete column.
2. When the "Delete Contact from Organization" dialog box appears, click the OK button to confirm or the Cancel button to cancel the delete process.

### 8.2.1.2 Expanded Organization Record – Grants Tab

Click on the Grants tab to view a list of all the grants awarded to the selected organization.

Edit	App #	Applicant Agency	Implementing Agency	Project Title	Start Date	End Date	Project Director
	<a href="#">BARM-2013-1030</a>	Aberdeen Police Department	Aberdeen Police Department	New/Replacement Body Armor	07/01/2012	06/30/2013	Severn, Albert
	<a href="#">BIAG-2007-0167</a>	Aberdeen Police Department	Aberdeen Police Department	CCTV/Pole Cameras (ETC)	01/01/2008	06/30/2009	Trabert, Henry
	<a href="#">BIAG-2009-1017</a>	Aberdeen Police Department	Aberdeen Police Department	Notification Software	10/01/2010	04/30/2012	Trabert, Henry
	<a href="#">BRIN-2009-1015</a>	Aberdeen Police Department	Aberdeen Police Department	LPR - Computer Replacement - LTR2	05/01/2012	06/30/2012	Severn, Albert
	<a href="#">HSCI-2000-0087</a>	City of Aberdeen	Aberdeen Police Department	Harford County/Aberdeen/Community Policing ?	01/01/2000	12/31/2000	Cox, Kenneth
	<a href="#">HSCI-2001-1015</a>	Aberdeen Police Department	Aberdeen Police Department	Harford-Aberdeen-Community Policing	02/01/2001	12/31/2001	Cox, Kenneth

Figure 302 - Organization Record - Grants Tab

The following columns are shown for each grant awarded to the organization:

1. Award Number (click to view grant summary in a popup window)
2. Applicant Agency
3. Implementing Agency
4. Project Title
5. Start Date
6. End Date
7. Project Director
8. Amount
9. County
10. Monitor
11. Status

The following action column is also displayed:

12. **Edit:** Click on the pencil icon in this column to edit the grant award. You will leave the Organizations database and be taken to the Grant Award Menu screen and you must navigate back to the address book menu item to return to the organization record:

The screenshot shows a detailed view of a grant award. The left sidebar contains navigation options like Home, Grant Management, Funding Management, Address Book, Reports, Admin, and Logout. The main content area is divided into several sections:

- GRANT SEQUENCE NUMBER:** Includes fields for Grant Number and Sequence Number.
- PROJECT TITLE:** Includes Project Title.
- APPLICANT AGENCY:** Includes fields for Applicant Agency Name, Address, City, State, Zip, County, and AUP Office.
- IMPLEMENTING AGENCY:** Includes fields for Implementing Agency Name, Address, City, State, Zip, County, and AUP Office.
- COUNTY/MUNICIPALITY:** Includes fields for County and Municipality.
- GRANT ROLES:** Includes fields for Project Director, Project Officer, GOCCP Regional Monitor, GOCCP Funding Manager, and GOCCP Fiscal Specialist.
- PROJECT DATES:** Includes fields for GFD Code, GFD Title, Funding Start Date, Funding End Date, Start Date, and End Date.
- AWARD DATES:** Includes fields for Approval Letter Issued, Approval Letter Sent, Award Accepted, Award Package Sent, and Proj. Contract/Invoice Sent.
- INVENTORY:** Includes a field for Inventory.
- RISK ASSESSMENT:** Includes a field for Risk Assessment.
- INITIATIVE:** Includes a field for Initiative.
- DEFICIENCY STATUS:** Includes a field for Deficiency Status and a Deficiency Note.

### 8.2.1.3 Expanded Organization Record – Documents Tab

Click on the Documents tab to view a list of all the documents associated with the selected organization.



Figure 298 - Organization Record - Documents Tab

The following columns are shown for each document associated with the organization:

- 13. Document Name
- 14. Created (Date the document was uploaded)
- 15. Modified Date the document record was last modified)
- 16. Modified By (Contact who last modified document record)

The following action columns are also displayed:

- 17. **Edit**: Click on the pencil icon in this column to edit the document record.
- 18. **Document**: Click on the Download link in this column to download a copy of the document.
- 19. **Delete**: Click the checkmark in this column to delete the document if you have uploaded the incorrect item.



Document records display grouped by classification, which is a value you can assign to a document when adding or editing a document record.

#### 8.2.1.3.1 Add a Document to an Organization

Adding a document to an organization involves uploading a file and providing information about it.

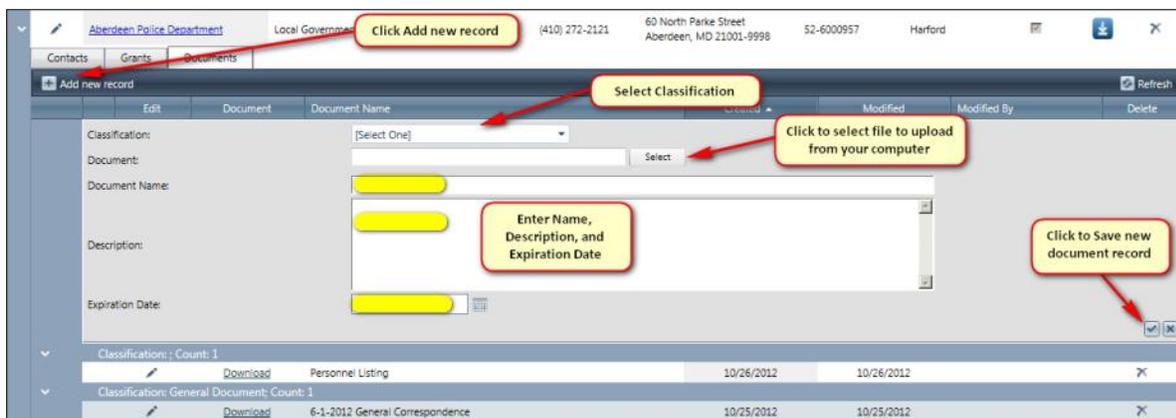


Figure 299 - Add Document to Organization

1. Click on Add New Record at the top of the Documents tab.
2. Select a Classification for the document from the drop-down menu.
3. Click the Select button. This will display a standard dialog box, shown in the figure below in the upper right corner that allows you to select a file from your computer to upload.

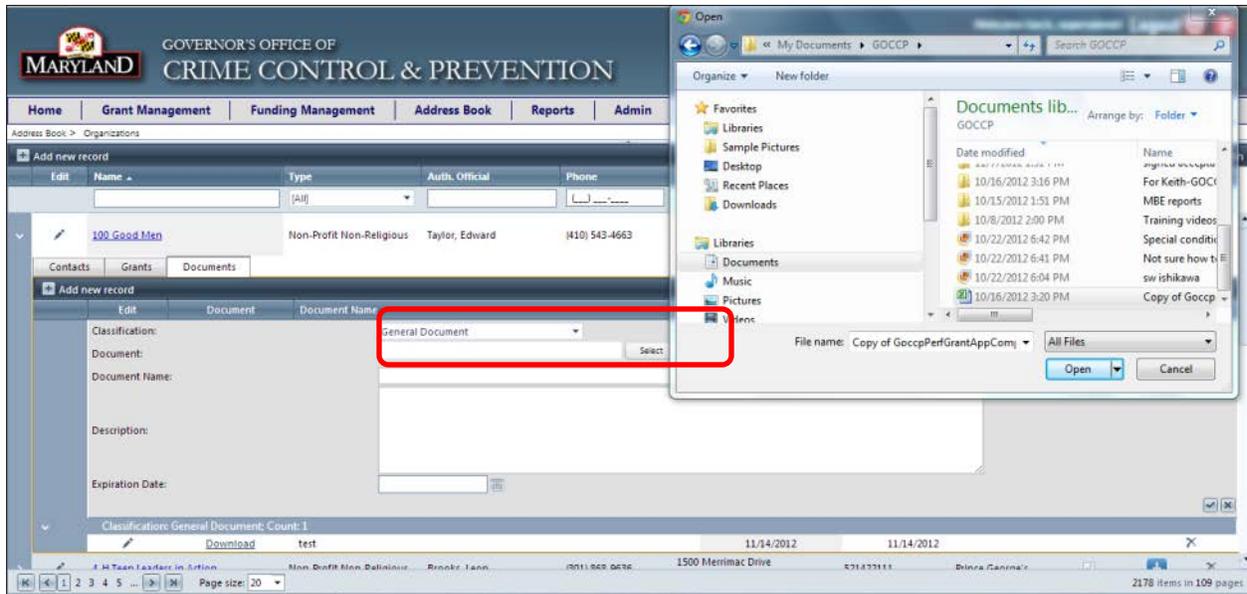


Figure 300. Upload document file

4. If there is a green dot next to the file name of the file you just selected, you are ready to upload. If there is a red dot next to the file name, then the file cannot be successfully uploaded due to format or connection errors. If there is a yellow dot next to the file name it is still loading.

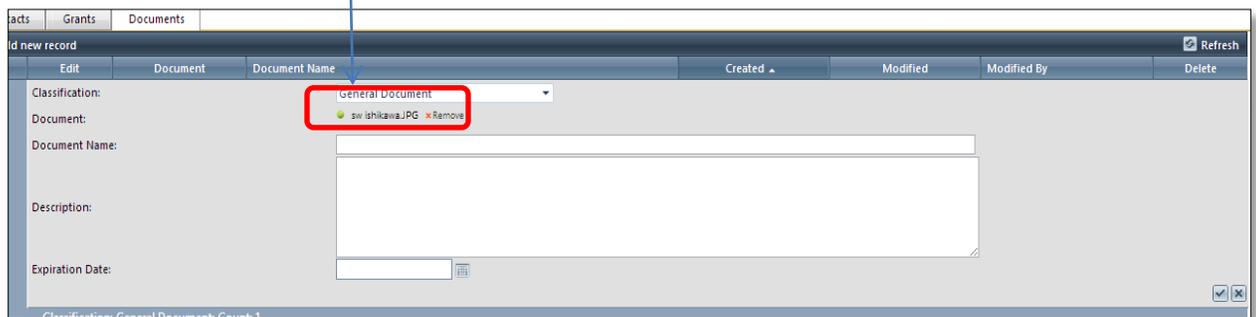


Figure 301. Document status indicators in uploading to the Documents section

5. Enter a descriptive name for the document. This will be the name of the document record and does not have to be the same name as the file you upload.
6. Enter a detailed description of the document into the Description field.
7. If applicable, enter a date into the Expiration Date field. This indicates the date after which the information in this document is no longer valid.
8. Click on the checkmark icon in the lower right hand corner to save the new document record.

### 8.2.1.3.2 Edit a Document Record in an Organization

You can edit certain information about a document record associated with an organization, including the documents classification and the records name, description, and expiration date.

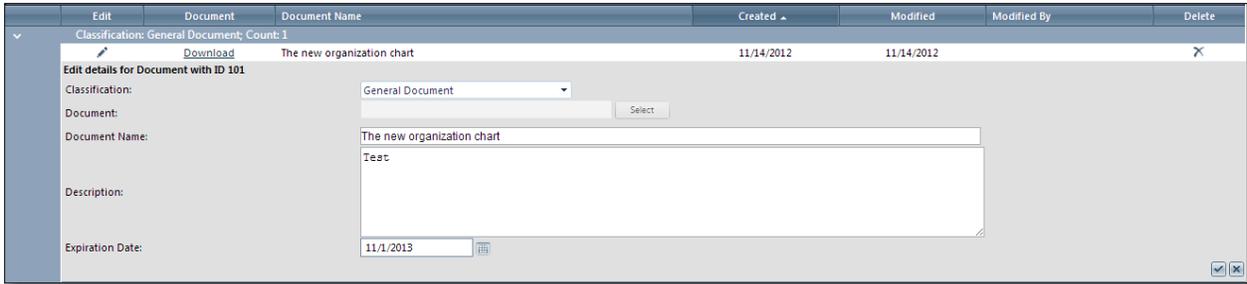


Figure 302 - Edit a Document Record for an Organization

1. Locate the document you wish to edit and click on the pencil icon in the Edit column.
2. Make any appropriate changes to the contacts data and optionally change the classification.
3. Click on the checkmark icon in the lower right hand corner to save your changes, or click on the X button beside the checkmark to cancel the edit.

### 8.2.1.3.3 View or Download a Document Record in an Organization

1. Locate the document you wish to view and click on the Download link. If the file name can be renamed if desired during download but by default is the same as shown in the download screen.

### 8.2.1.3.4 Delete a Document Record in an Organization

1. Locate the document you wish to delete and click on the checkmark in the Delete column to delete, click Ok to continue.

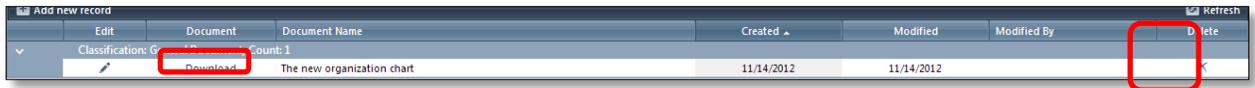


Figure 303- Download, View or Delete a Document record

## 8.2.2 Add an Organization

1. Access the Organizations database by selecting Organizations from the Address Book menu:



Figure 304 - Access the Organizations Screen

2. Click Add New Record from the Organizations screen.

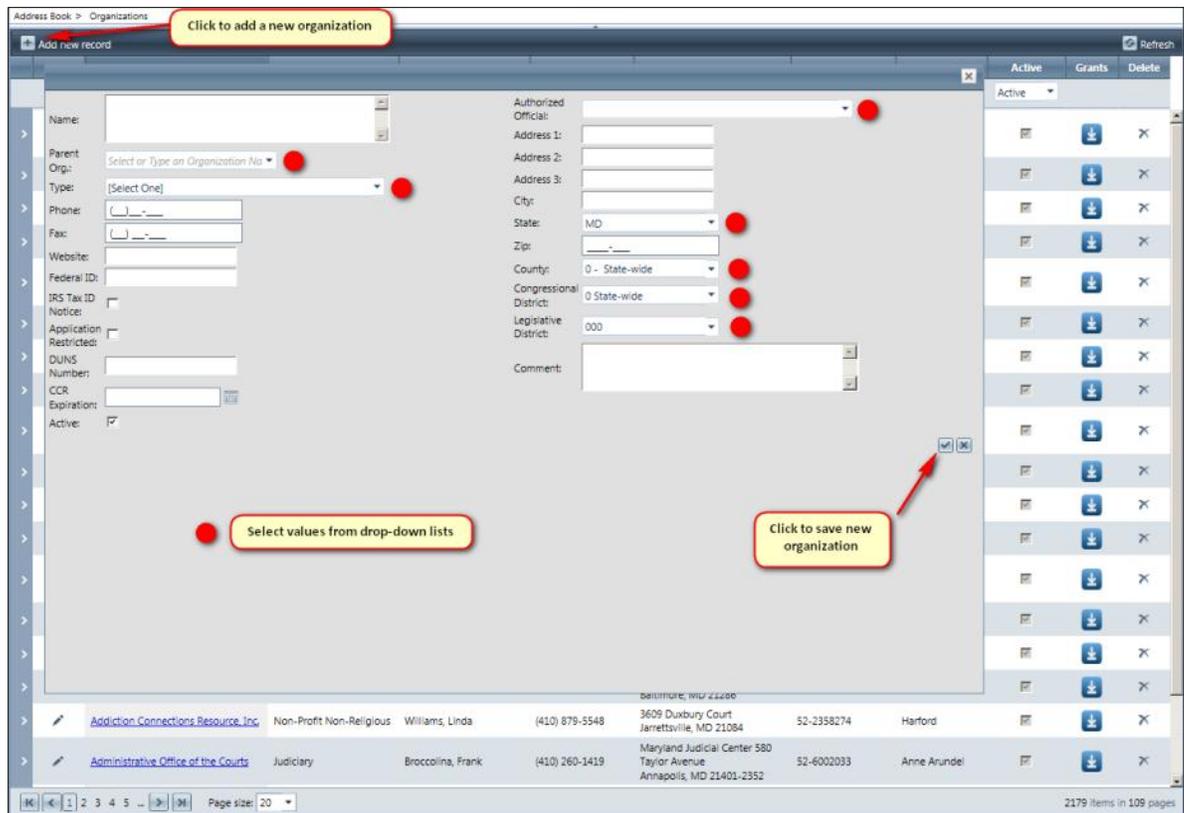


Figure 305 - Add New Organization

3. Enter information about the organization into the data fields as follows. Where applicable, select values from drop-down lists. *At a minimum, the Organization Name and Type are required to create an Organization record.*

- **Name:** Organization Name (required)
- **Parent Organization:** Select from drop-down list if applicable
- **Type:** Select from drop-down list (required)
- **Phone:** Provide primary phone number for organization
- **Fax:** Provide primary fax number for organization
- **Website:** Provide URL if the organization has a website
- **Federal ID:**
- **IRS Tax ID Notice:** Place a checkmark in this box if the organization has a W-9 on file
- **Application Restricted:** Place a checkmark in this box if applicable (requires Parent Organization)
- **DUNS Number:** Provide DUNS number (nine characters, no punctuation)
- **CCR Expiration:** Either type in the date or select it using the calendar icon
- **Active:** Place a checkmark in this box to make the organization active in GMS (default is checked)
- **Authorized Official:** Select a contact from the drop-down list. The contact must exist in the GMS contacts database to be selected here
- **Address Fields:** Enter the physical address of the authorized official for the organization
- **Congressional District:** Select from the drop-down list

- **Legislative District:** Select from the drop-down list
- **Comment:** Enter any notes or descriptions provided by the organization

**4. Save.**

### 8.2.3 Edit an Organization

1. Click on the pencil icon in the Edit column of the record you wish to edit.

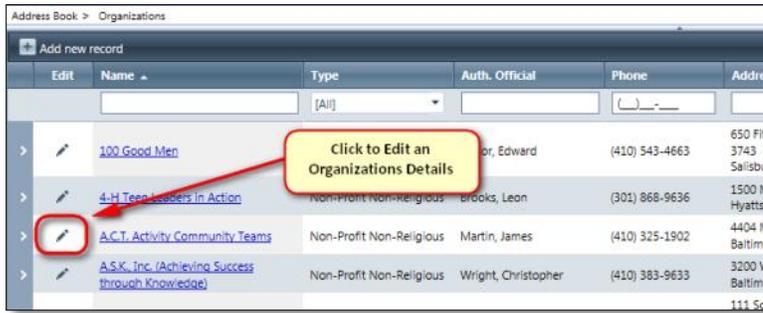
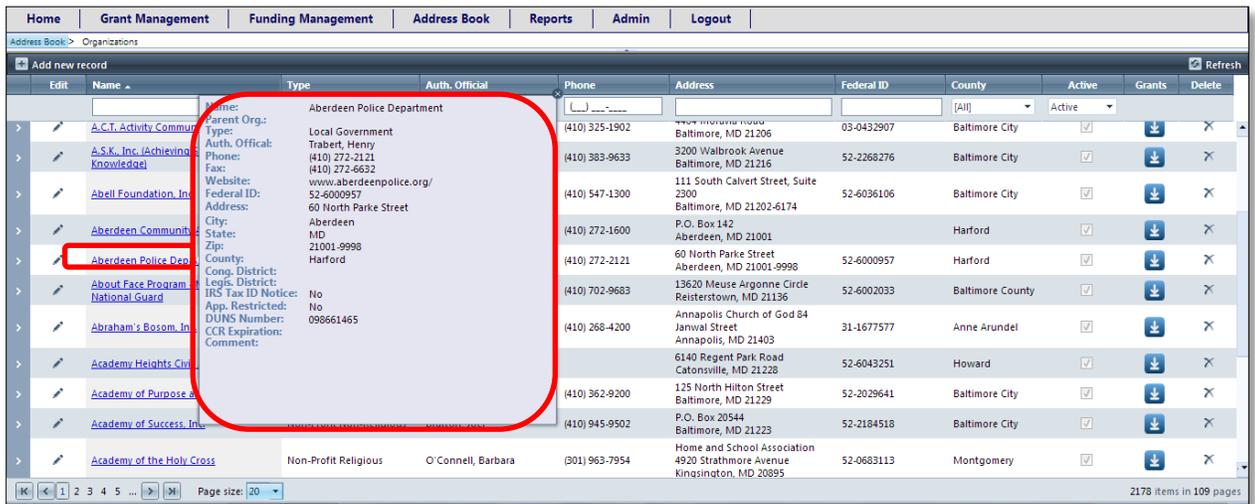


Figure 306 – Access the Organization Edit Screen

2. If you do not have the ability to edit an organization, click on the link for the organization name to see a tooltip with all of its details.



3. Modify any applicable fields, then click the checkmark to save your changes. Refer to the section **Add an Organization** above for descriptions of the data fields.

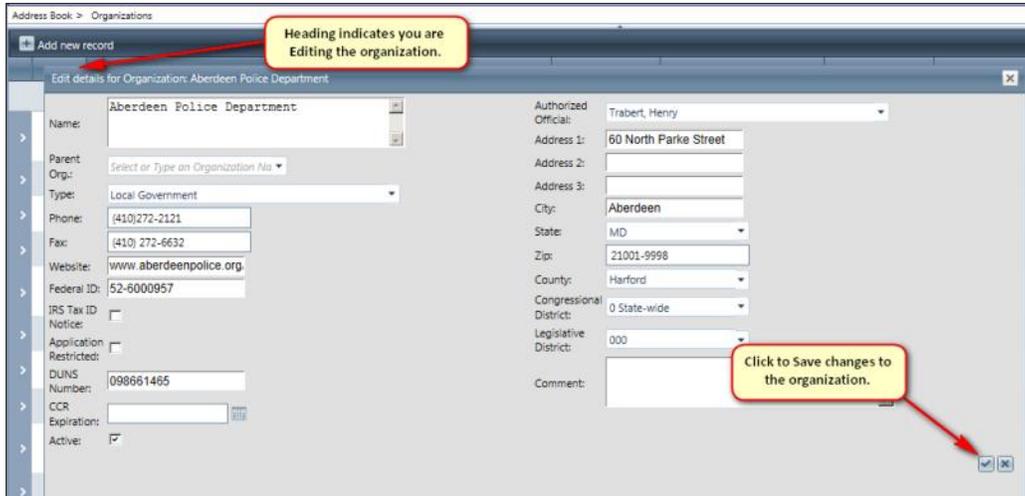


Figure 307 - Edit an Organization

## 8.2.4 Delete an Organization

You can delete an existing Organization from the GMS Organizations database. *However, deleting an Organization should go through internal approvals as all the related Program, Grant and activity data of the Organization will also be deleted.*

1. Click on the X icon in the Delete column of the record you wish to delete.

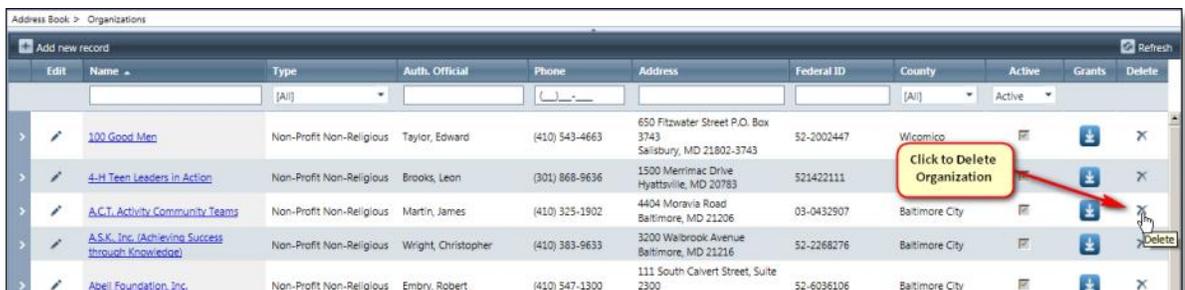


Figure 308 - Delete an Organization

2. Click the OK button when the delete-confirmation dialog box appears. If you click the Cancel button, the organization will not be deleted.

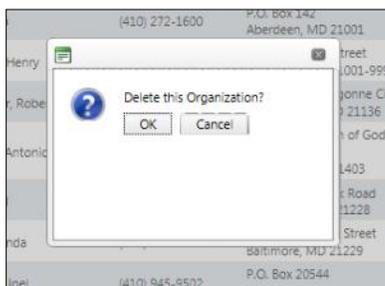


Figure 309 - Confirm Deletion of Organization

## 8.3 Contacts

Access the Contacts database by selecting Contacts from the Address Book menu:



Figure 310 - Address Book -> Contacts

The Contacts screen is displayed:

Edit	Contact Name	Organization Name	Job Title	Phone	Fax	Email	Active	Delete
>	<a href="#">Abel Sr, Ed</a>	Stoneleigh Citizens on Patrol (COP)		(410) 377-0501			☑	✕
>	<a href="#">Abel, Paul L</a>	Baltimore Police Department	Acting Fiscal Director	(410) 396-2498		Paul.abel@baltimorepolice.org	☑	✕
>	<a href="#">Abookire, Noerana</a>	Governor's Office of Crime Control & Prevention		(410) 821-2828			☑	✕
>	<a href="#">Abraham MSW, Meena</a>	Center for a Healthy Maryland	Executive Director	(410) 539-0872	(410) 547-0915	mabraham@medchi.org	☑	✕
>	<a href="#">Abraham, Mary</a>	Governor's Office of Crime Control & Prevention		(410) 821-2828			☑	✕
>	<a href="#">Abraham, Skaria P</a>	City of New Carrollton	Finance Director	(301) 459-6100	(301) 459-8172	skariaabraham199@hotmail.com	☑	✕
>	<a href="#">Abrams, Erwin E</a>	Hospice of the Chesapeake, Inc.	President and CEO	(410) 987-2129	(410) 987-3961		☑	✕
>	<a href="#">Abrams, Kerry Ann</a>	Town of Port Deposit		(410) 378-2121	(410) 378-9104	mayor@portdeposit.org	☑	✕
>	<a href="#">Abramson Ph.D., Lauren</a>	Community Conferencing Center	Executive Director	(410) 889-7400	(410) 889-0944	labramso@jhm.edu	☑	✕
>	<a href="#">Abramson, Carol</a>	Frederick County Government - Commissioners	Frederick County Grants Coordinator	(301) 600-1120	(301) 600-1302	cabramson@freddco-md.net	☑	✕
>	<a href="#">Abrims, Jack</a>	Woodside Garden Apartments Community Association	President	(410) 269-6563	(410) 269-0831		☑	✕
>	<a href="#">Acevedo-Harper, Sandra</a>	Montgomery County State's Attorney's Office	Victim-Witness Coordinator	(240) 777-7493	(240) 777-7413	sandra.acevedo-harper@montgomerycountymd.gov	☑	✕
>	<a href="#">Achuff, Grace D</a>	District Court of Maryland	Administrative Clerk	(410) 996-0720		grace.achuff@courts.state.md.us	☑	✕
>	<a href="#">Achuff, Richard</a>	Cecil County State's Attorney's Office	Chief Investigator	(410) 996-5335	(410) 392-7614		☑	✕
>	<a href="#">Acierno, Michael</a>	Town of Brookeville	President of Commission	(301) 570-4465	(301) 570-0355	acierno@dtm.ci.wv.edu	☑	✕
>	<a href="#">Ackerson, Angeia</a>	Cross Cultures Youth Day Camp	Director	(410) 341-4670	(410) 677-4489		☑	✕

Figure 311 - The Contacts Screen

From this screen, you can:

1. View all of the Contacts in the GMS database
2. Search for a Contact: (Please note when searching for a contact searches for a first and last name must be entered specifically as the data would be formatted in this column including suffix and all appropriate commas. For example, searching for the former Police Chief of Baltimore City Police: Frederick Bealefeld III would require the user to enter:

Bealefeld III, Frederick H

3. Add Contacts to an Organization
4. Add a new Contact
5. Edit a Contact
6. Delete a Contact

Edit	Contact Name	Organization Name	Job Title	Phone	Fax	Email	Active	Delete
	Abel Sr. Ed	Stoneleigh Citizens on Patrol (COP)		(410) 377-0501			Active	X
	Abel Paul L	Baltimore Police Department	Acting Fiscal Director	(410) 396-2498		Paul.abel@baltimorepolice.org		X
	Abookire Noerens	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Abraham MSW Meena	Center for a Healthy Maryland	Executive Director	(410) 539-0872	(410) 547-0915	mabraham@medchl.org		X

Figure 312 - GMS Contact Fields

If you do not see a pencil in the Edit column on the left side, then click the name of the contact to see the details about it.

Home	Grant Management	Funding Management	Address Book	Reports	Admin	Logout		
	Adigun Kavode	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Alexander Andrea	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Allen Haman	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Allison Ia	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Alphonso	Prefix/Salutation: / Names: Stephen Amos Organization: Governor's Office of Crime Control & Prevention Job Title: Address: 300 East Joppa Road, Suite 1105 City: Baltimore State: MD Zip: 21286-3012 Phone: (410) 821-2828 Fax: (410) 321-3116 E-Mail: User Name: Comment:		(410) 821-2828				X
	Alston Br	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Alston Ch	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Amos Ste	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Antal Jam	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Arnold D	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Baqorazu	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Baier Mic	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Baig Osman	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Bailey Felicia	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Baker-Simon Patricia	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Barmwell Benj	Governor's Office of Crime Control & Prevention		(410) 821-2828				X
	Baum Alisa	Governor's Office of Crime Control & Prevention		(410) 821-2828				X

Figure 313 - View contact details when you do not have the ability to edit

The following columns of information are displayed for each organization record:

1. Contact Name
2. Organization Name (organization that the contact is assigned to)
3. Job Title
4. Phone
5. Fax
6. Email
7. Active Status

Three action columns are also included in this view:

8. **Edit:** Click the pencil icon in this column to edit the information for an organization
9. **Delete:** Click the X icon in this column to delete an organization from the database.

### 8.3.1 Expand and View a Contact Record

Scroll through the list and use the search/filter fields to locate the contact you wish to view. Refer to the section *Sorting, Filtering, and Searching for Records* for help with sorting, filtering, and searching for records.

1. When you locate the contact you want to view, click the expand icon to the left of the record.

>		Abell Foundation, Inc.	Non-Profit Non-Religious	Embry, Robert	(41
>		Aberdeen Community Action Coalition	Non-Profit Non-Religious	Lucas, Jo	(41
>		Aberdeen Police Department	Local Government	Trabert, Henry	(41

Figure 314 - Expand Contact Record

- Contact information is displayed in tabs beneath the expanded record.

The screenshot shows the 'GOVERNOR'S OFFICE OF CRIME CONTROL & PREVENTION' web application. The 'Address Book' section is active, displaying a list of contacts. The contact 'Abraham MSW, Meena' is expanded, showing four tabs: Address, Phone Number, Email Address, and Organizations. The 'Address' tab is selected, displaying a table with the following information:

Address Type	Address Line 1	Address 2	Address 3	City	State	Zip	Primary	Edit	Delete
Work	Center for a Healthy Maryland: 1211 Cathedral Street			Baltimore	MD	21201	<input type="checkbox"/>		

Figure 315 - Expanded Contact Record

### 8.3.1.1 Expanded Contact Record – Information Tabs

A contact's information is displayed in four tabs beneath the contact record when it is expanded. Each tab contains one record for each information type, for example if the contact has several phone numbers (work, home, etc), each phone number will be displayed as a separate record within the Phone Number tab. The tabs are:

- Address
- Phone Number
- Email Address
- Organizations

Upon expanding a contact record, the Address tab is displayed by default. For descriptions of each tab, refer to the section **Edit a Contact**.

This close-up screenshot shows the 'Address' tab selected in the contact information section. The table below displays the contact's work address:

Address Type	Address Line 1	Address 2	Address 3	City	State	Zip	Primary	Edit	Delete
Work	Center for a Healthy Maryland: 1211 Cathedral Street			Baltimore	MD	21201	<input type="checkbox"/>		

Figure 316 - Contact Record – Contact Information Displayed in Tabs

### 8.3.2 Add a New Contact

- Click Add New Record from the Organizations screen.

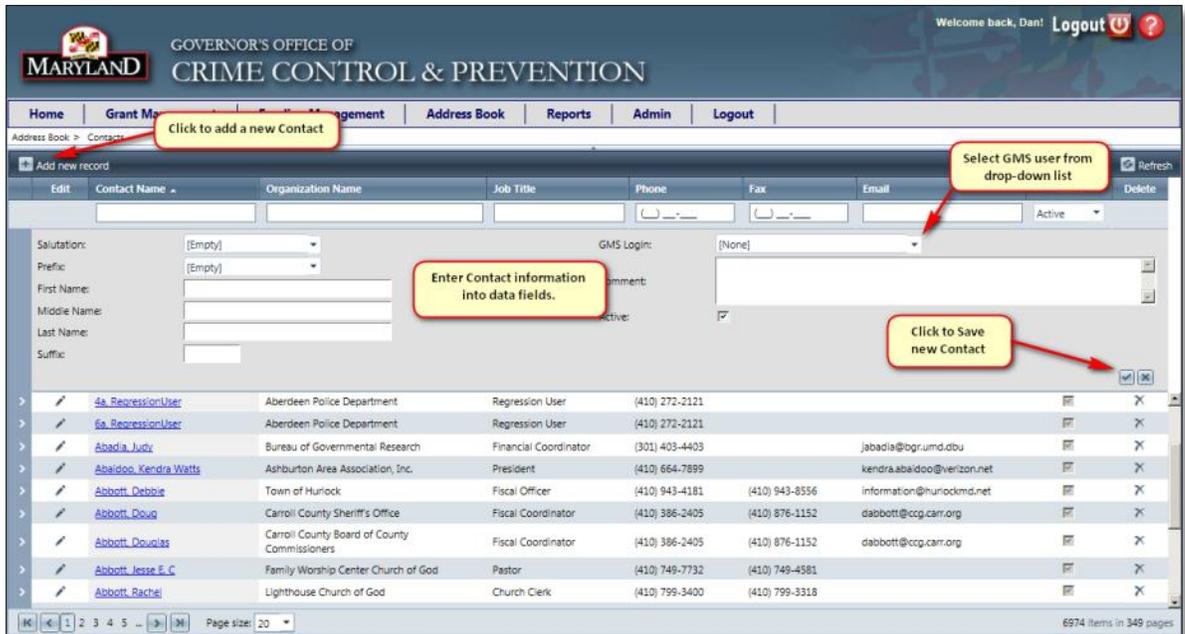


Figure 317 - Add New Contact

2. Enter information about the contact into the data fields as follows. Where applicable, select values from drop-down lists. *At a minimum, the First Name and Last Name are required to create a Contact record.*

- Salutation (optional)
- Prefix (optional)
- First Name (required)
- Middle Name (optional)
- Last Name (required)
- Suffix (optional)
- GMS login (Select from drop-down menu)
- Active status – defaulted with a check for Active

3. Click the checkmark icon in the lower right corner to save the new contact.

You are taken back to the main Contacts screen. At this point the new contact has been saved and is now in the GMS database, and you can now add addresses, phone numbers, and email addresses to the new contact, and associate the new contact with an organization. Refer to the section **Edit a Contact** for instructions on adding information to a contact.

4. To quickly locate the new contact you just added, type the full or partial name into the Contact Name field in the column heading and press Enter.

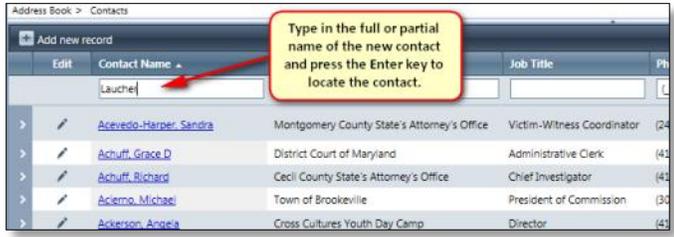


Figure 318 - Locate New Contact Record

5. The search executes and the newly added contact record is displayed. See the following section for instructions for adding additional information to the new contact.



### 8.3.3 Edit a Contact

Locate the contact you wish to edit – refer to the section *Sorting, Filtering, and Searching for Records* for help locating a contact in the database.

#### 8.3.3.1 Editing High-Level Contact Information

1. When you locate the contact you wish to edit, click the Expand arrow next to the record:



Figure 319 - Expand Contact Record

2. To edit high-level contact information, click the Pencil icon in the Edit column. This will display the high-level contact data entry screen – the same screen used when initially adding a contact.

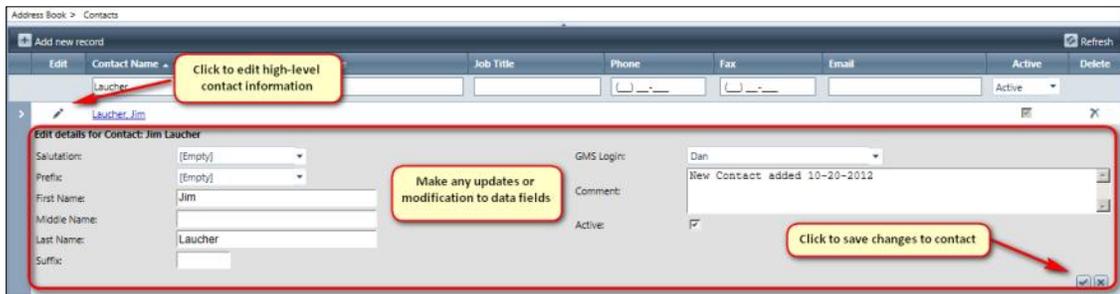


Figure 320 - Edit High-Level Contact Details

3. Click on the checkmark icon in the lower right corner to save changes to the contact.

### 8.3.3.2 Editing Contact Information in Tabs

Use the tabs located below the expanded contact record to add or edit a contact's addresses, phone numbers, and email addresses, and to assign the contact to an organization.



Figure 321 - Add New or Edit Existing Contact Information in Tabs

5. The following procedures describe how to add new information to a contact. The same procedures apply for editing records in tabs for a contact – you will just click the pencil icon in the Edit column of the record instead of clicking the Add New Record icon.

#### 8.3.3.2.1 Add an Address to a Contact

1. Click on the Address tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Address tab for the expanded contact record.

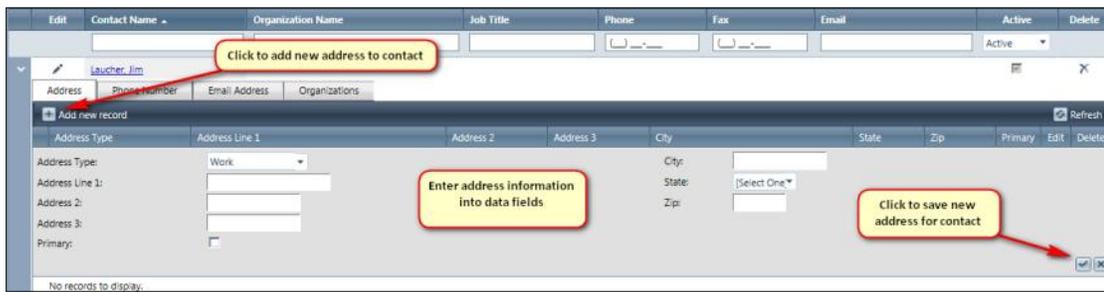


Figure 322 - Add a new Address to a Contact

3. Enter the new address information into the data fields. Place a checkmark into the Primary checkbox if this address is the contact's primary address.
4. Click on the checkmark in the lower right corner to save the new address.

#### 8.3.3.2.2 Add a Phone Number to a Contact

1. Click on the Phone Number tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Phone Number tab for the expanded contact record.



Figure 323 - Add a new Phone Number to a Contact

3. Select the Phone Number type from the drop-down list.

4. Type the area code and phone number into the Phone Number field. Enter an extension in the Extension field if applicable.
5. Place a checkmark into the Primary checkbox if this address is the contact's primary phone.
6. Click on the checkmark in the lower right corner to save the new phone number.

### 8.3.3.2.3 Add an Email Address to a Contact

1. Click on the Email Address tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Email Address tab for the expanded contact record.



Figure 324 - Add a new Email Address to a Contact

3. Select the Email Address type from the drop-down list.
4. Type the email address into the field.
5. Place a checkmark into the Primary checkbox if this is the contact's primary email address.
6. Click on the checkmark in the lower right corner to save the new email address.

### 8.3.3.2.4 Add an Organization to a Contact

1. Click on the Organizations tab if it is not currently highlighted and active.
2. Click the Add New Record icon directly beneath the Organizations tab for the expanded contact record.

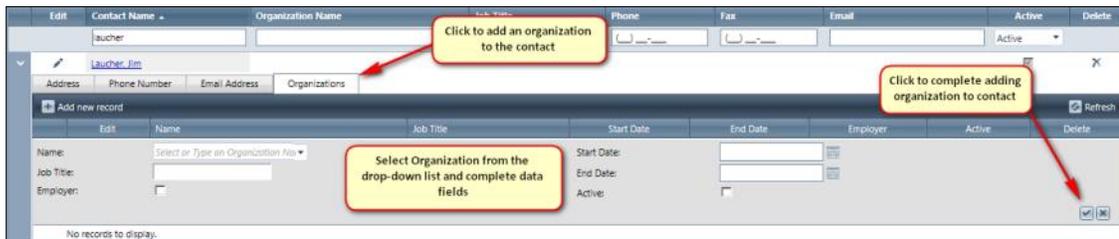


Figure 325 - Add an Organization to a Contact

3. Click on the Name drop-down list to display a listing of all the organizations in the GMS Organizations database that are available to you. If you know the organization name, you can begin typing it to find it in the list. When you find the correct organization, click on it to select it.
4. If the organization is the contact's employer, enter the contact's job title into that field and place a checkmark in the Employer box.

The employer checkbox indicates if this person is an employee. It also updates the contact's address, phone and organization tabs to include the organization's values in each area as part of their own.

The following logic pertains to the Employer checkbox on the association between Contact and Organization:

1. A contact may only have one (1) employer at a time. All previously selected Employer values for the given contact are cleared when a record is saved with the Employer checkbox checked.
2. The organization name shown on the Contact Search Grid is the one selected as Employer
3. Work Address and Work Phone Number are displayed from the Employer Organization record on the Employed Contact's Phone and Address lists.



Figure 326 - Contact Record when Employer checkbox is checked

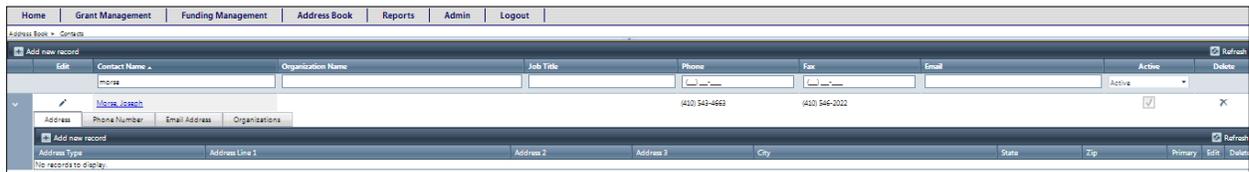


Figure 327 - Contact Record when Employer checkbox is not checked

1. Enter the date the contact started with the organization into the Start Date field, or select it by clicking on the calendar icon beside the field.
2. If the contact is no longer employed by the organization, enter a date into the End Date field.
3. Place a checkmark into the Active checkbox if this is the contact is currently associated with the organization.
4. Click on the checkmark in the lower right corner to save the new organization record.

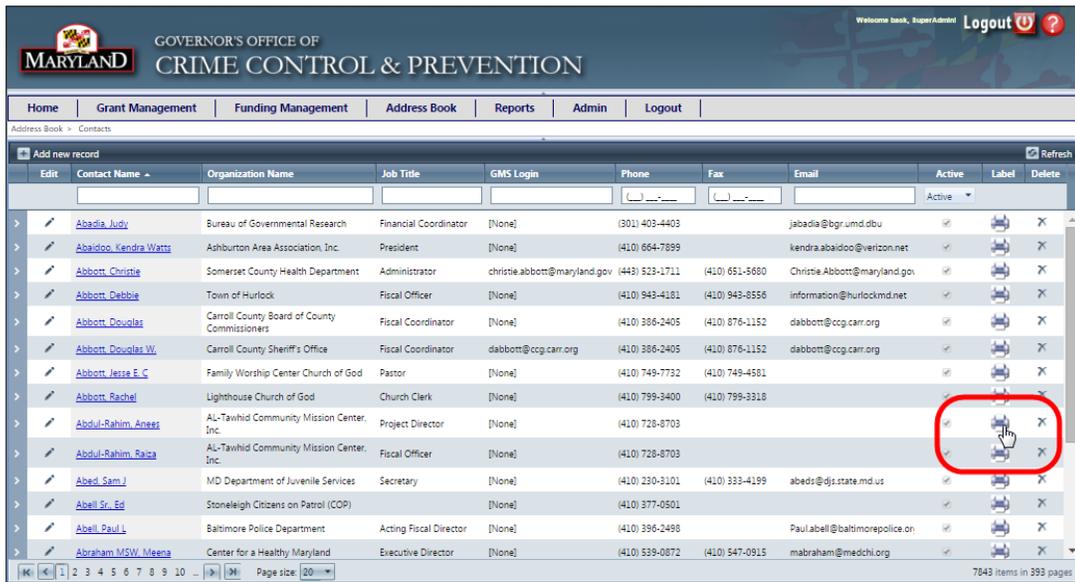
### 8.3.4 Print Contact Labels

To expedite the process of sending correspondence, you can print a contact's mailing address on an Avery 5163-compatible mailing label sheet. These sheets contain 10 mailing labels, and you can control which label you want to print the contact's address on.

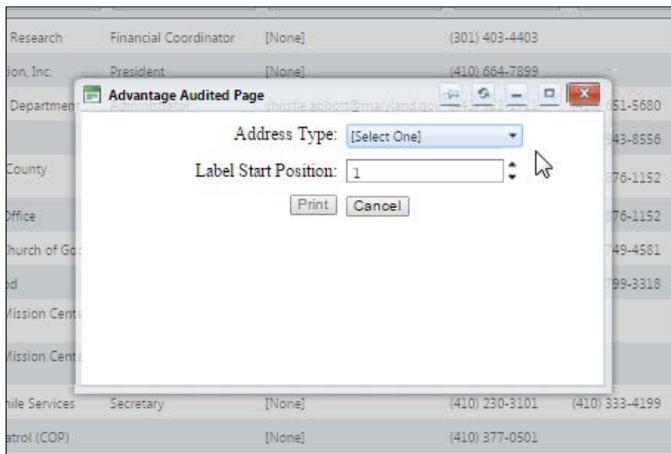


To print a mailing label for a contact:

1. In the **Address Book -> Contacts** listing, click the printer icon in the **Label** column for the contact you wish to print:



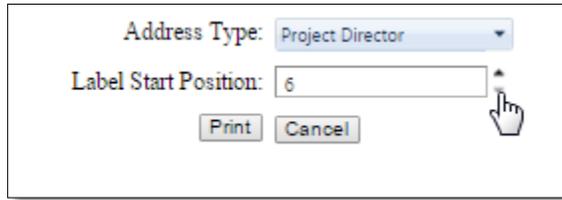
2. The print dialog box appears:



- a. Click on the drop-down box arrow beside **Address Type** and click to select:

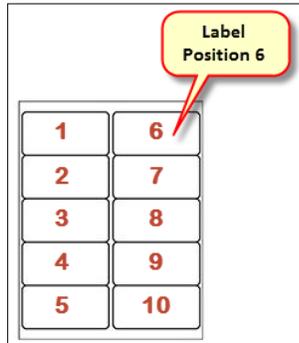


- b. Next, select the Label Start Position by clicking on the up or down arrows:



Address Type: Project Director  
Label Start Position: 6  
Print Cancel

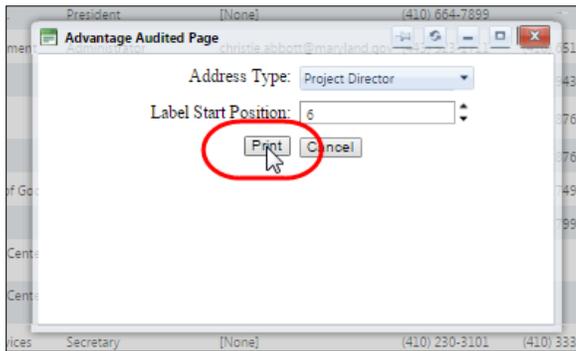
You can select where on the page you'd like the label to print. For example, if you select **Label Start Position 6**, your label will print on the label page as so:



1	6
2	7
3	8
4	9
5	10

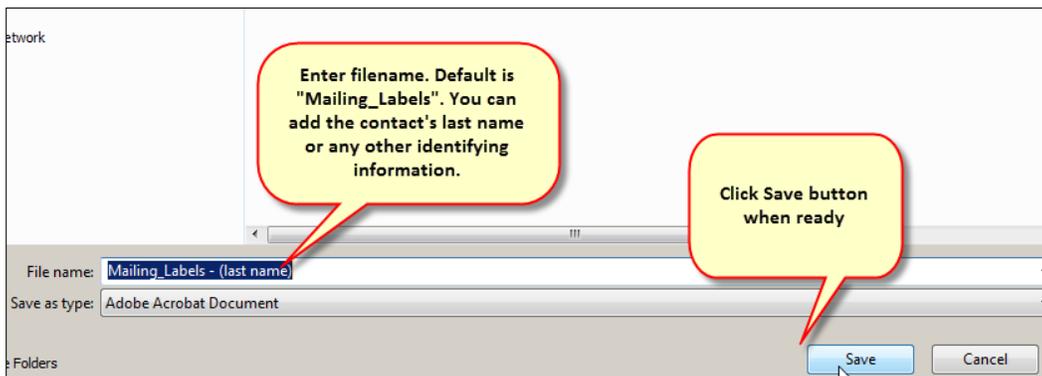
Label Position 6

3. When you've selected the label position, click on the **Print** button:



Advantage Audited Page  
Address Type: Project Director  
Label Start Position: 6  
Print Cancel

4. Type in the filename, then click the **Save** button.

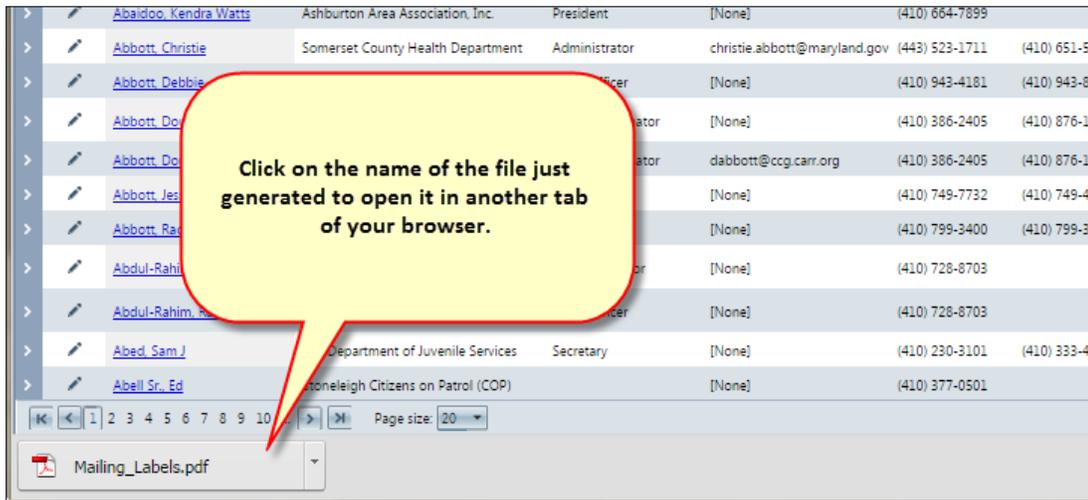


Enter filename. Default is "Mailing\_Labels". You can add the contact's last name or any other identifying information.

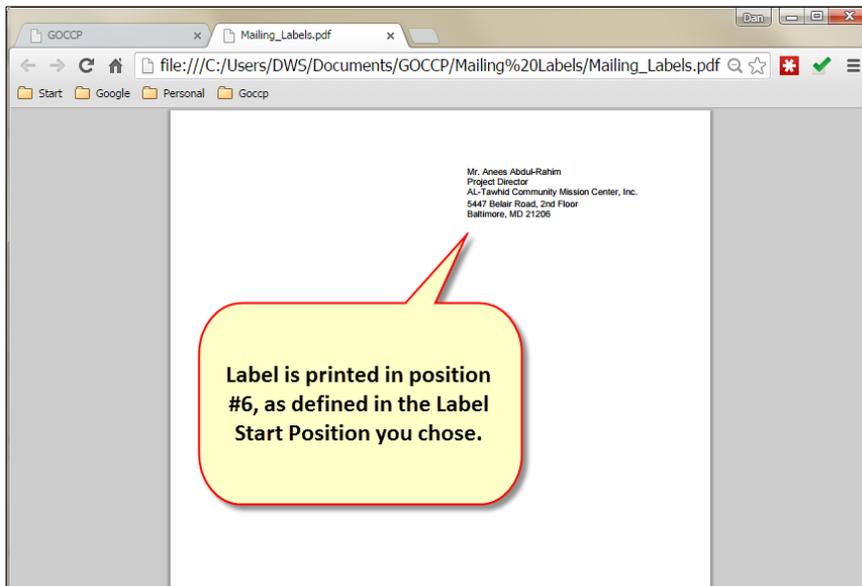
Click Save button when ready

File name: Mailing\_Labels - (last name)  
Save as type: Adobe Acrobat Document  
Save Cancel

5. Locate the file on your hard disk and click to open the PDF, or if your browser shows the file at the bottom, click on that to open the label report in a new tab:



6. From here you can print the sheet directly to your printer.



### 8.3.5 Delete a Contact

You can delete an existing Organization from the GMS Organizations database. *However, deleting an Organization should go through internal approvals as all the related Program, Grant and activity data of the Organization will also be deleted.*

1. Click on the X icon in the Edit column of the record you wish to delete.



Figure 328 - Delete a Contact

2. Click the OK button when the delete-confirmation dialog box appears. If you click the Cancel button, the contact will not be deleted.



Figure 329 - Confirm Deletion of Contact

## 9 Admin

GOCCP administrators and technical personnel use the tools provided in the Admin menu to control and configure GMS system-wide data and processes.

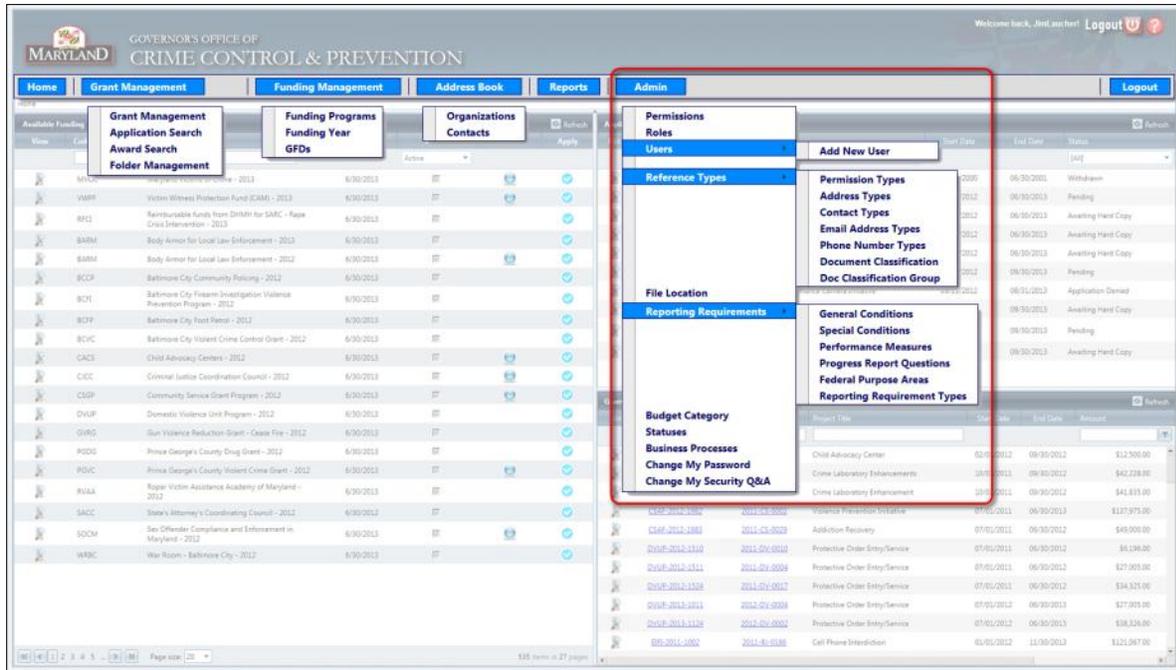


Figure 330 – GMS Admin Menu

GMS is a role-based system; users have access to system features like viewing screens, changing statuses, creating funding programs, and editing applications & awards based on what role is assigned to their user ID. All of the customizable information used to implement GMS businesses processes are defined in the Admin menu.

NOTE: The Business Process System (E&V) includes complex logic for dynamic processing of custom validation, events, and actions. Statuses, Flows, Events, Actions, etc. make up the Business Processing System. No changes should be made to any of those areas without the involvement of the development team to ensure dependencies are not broken and processing logic is maintained.

### 9.1 Admin Screens Illustration

This illustration demonstrates the following GMS screens:

6. Admin -> Users
7. Admin -> Roles
8. Admin -> Permissions
9. Admin -> Business Processes
10. Admin -> Statuses

To illustrate how information defined in the various Admin screens combine to define processes in GMS, consider the Grant Application process. After an application is initially created, it progresses through various statuses like Submitted, Pending, and Internal Review. Sometimes the application status changes

after the applicant takes action, like submitting or cancelling the application. Other times the application status will change when a GOCCP user takes action, like receiving the hardcopy or beginning an internal review of the application. Eventually the application is either denied or awarded as a grant and its status is changed accordingly.

1. In this illustration, there are several **Users** involved, including the applicant and the GOCCP user. Those users have been assigned **Roles** (the applicant could be assigned the role *External User*, the GOCCP user may be assigned the roles of *Internal Staff* and *Regional Monitor*. Users are set up in GMS in the [Admin -> Users](#) screen.



Figure 331 - Admin -> Users Screen

2. The GOCCP user has permission to view, edit, and change the status of the application because their User ID has the *Internal Staff* role assigned to it, and that role has been defined with those permissions. Roles are set up in GMS in the [Admin -> Roles](#) screen.



Figure 332 - Admin -> Roles Screen

3. Because the applicants User ID has been assigned the Role of *External User*, they have **Permission** to access the Grant Menu screens as well as to change the status of the application to Submitted or another status like Withdrawn. Similarly, because the GOCCP User ID has been assigned the Role of *Internal Staff*, they have the permission to view and edit the Grant

Application as well as to change its Status to Hardcopy Received, Internal Review, Awarded, or another status. Permissions are defined in the *Admin -> Permissions* screen.

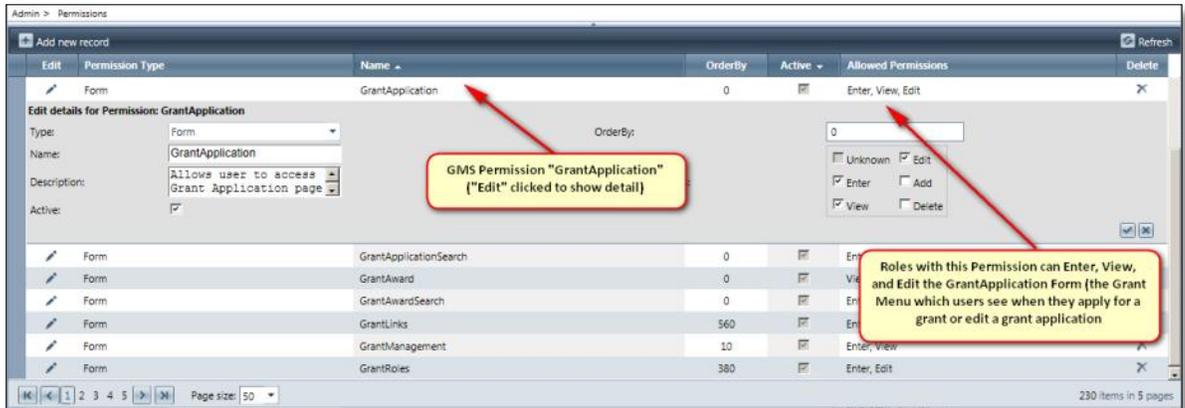


Figure 333 - Admin -> Permissions Screen (Permission to access a GMS Screen)



Figure 334 - Admin -> Permissions Screen (Permission to change an Application Status)

- The action of moving a grant application from one status to the next – in this case from *Hardcopy Received* to *Internal Review* – is called a Workflow in GMS. In a larger context, the entire Grant Application process is called a **Business Process** in GMS.

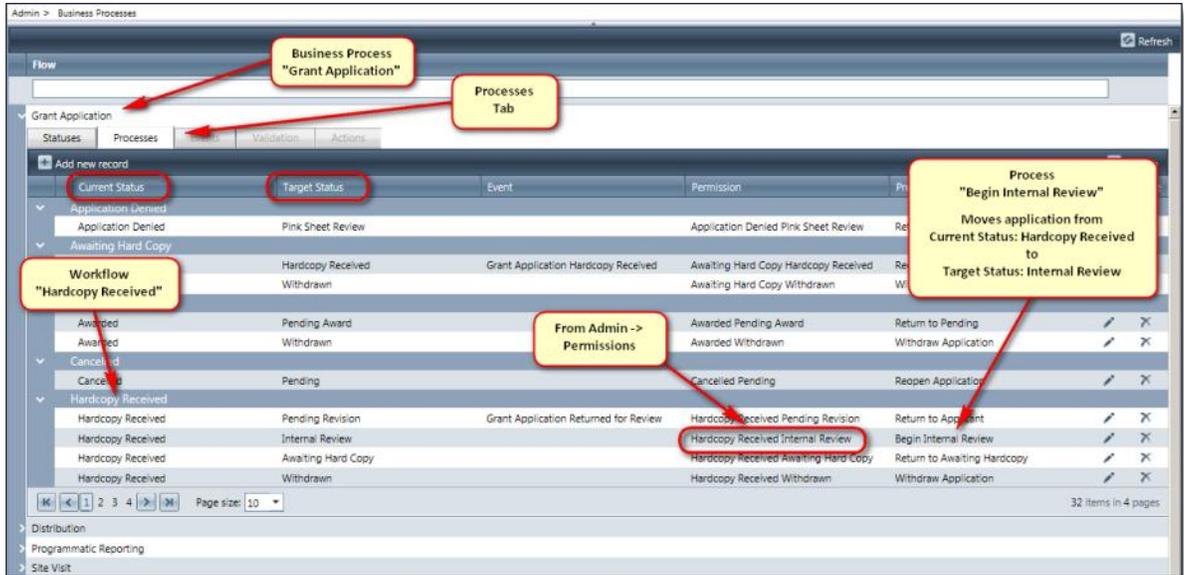


Figure 335 - Admin -> Business Processes Screen

- Business processes contain many workflows; the Hardcopy Received workflow is expanded and contains one record for each status that the application could be moved to from Hardcopy Received. For this illustration, the relevant record can be found under the *Grant Application* Business Process, the *Hardcopy Received* Workflow, and the *Begin Internal Review* process.
5. In order for Statuses to be available for creating workflows in Business Processes (and anywhere else within GMS) they must be defined in the [Admin -> Statuses](#) screen.



Figure 336 - Admin -> Statuses

## 9.2 Add a New GMS User

Create new GMS user by accessing the Add New User screen (Click Admin -> Users -> Add New User). Note that the new user can log into the system, but in order for them to apply for a grant or view any organizations' applications or awards, they must be associated with a Contact and an Organization.

### 9.2.1 Add new GMS Login

1. Access Add New User from the Admin menu.



Figure 337 - Admin -> Users -> Add New User

2. Enter the new users information.



Figure 338 - Enter New User Information

3. Click the Create User button in the lower right corner of the window.

## 9.2.2 Associate New GMS Login with a GMS Contact

1. Access the Contacts database by selecting Contacts from the Address Book menu:



Figure 339 - Access Address Book -> Contacts

2. Click Add new record

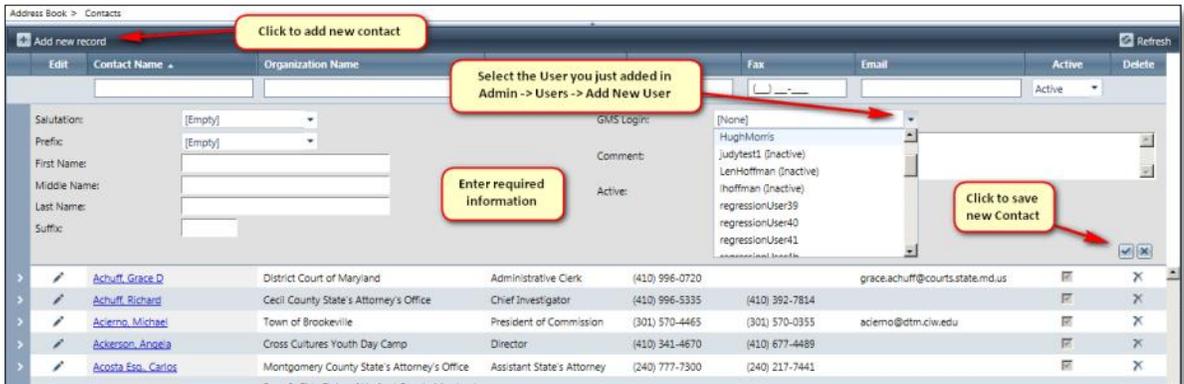


Figure 340 - Add New Contact Record and Select GMS User ID

3. Enter required information, associate the new contact with the new GMS user you added by selecting their User ID from the drop-down list, and click the Save icon.

### 9.2.3 Associate New Contact with a GMS Organization

1. Locate the contact you just added, and click the Expand icon next to the record to display the data tabs beneath it.

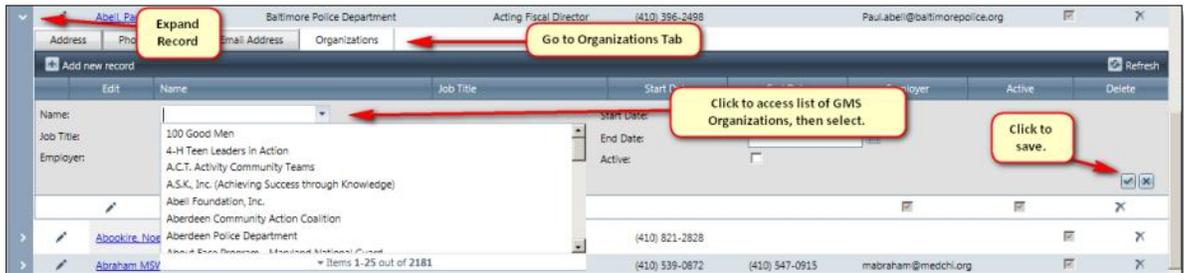


Figure 341 - Add an Organization to a Contact

2. Click on the Organizations tab if it is not currently highlighted and active.
3. Click the Add New Record icon directly beneath the Organizations tab for the expanded contact record.
4. Click on the Name drop-down list to display a listing of all the organizations in the GMS Organizations database that are available to you. If you know the organization name, you can begin typing it to find it in the list. When you find the correct organization, click on it to select it.
5. If the organization is the contact's employer, enter the contact's job title into that field and place a checkmark in the Employer box.
6. Enter the date the contact started with the organization into the Start Date field, or select it by clicking on the calendar icon beside the field.
7. If the contact is no longer employed by the organization, enter a date into the End Date field.
8. Place a checkmark into the Active checkbox if this is the contact is currently associated with the organization.
9. Click on the checkmark in the lower right corner to save the new organization record.

With these three steps complete, the new user will have permission to apply for a grant and will see the associated organizations' applications and awards in their home page dashboards.

## 9.3 Reference Types

Reference types are labels for categories of values that a particular object could potentially have. For example, if the object is a Phone Number, the reference types could be Home, Work, Cell, etc. In GMS, reference types are normally selected from a drop-down list. Using phone number as an example, when adding a phone number to a GMS Contact, you will be required to select a Phone Number Type from the drop-down list:

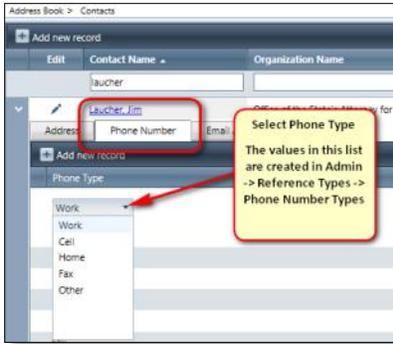


Figure 342 - Selecting a Reference Type from a Drop-down List

1. To add a new Phone Number Reference Type, go to Admin -> Reference Types -> Phone Number Types and click.

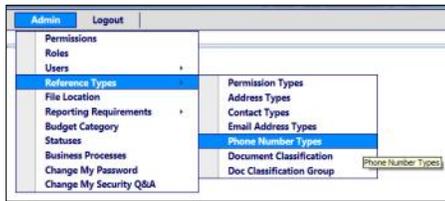


Figure 343 - Access Admin -> Reference Types -> Phone Number Types

2. Click the Add New Record icon, and enter the new type name.

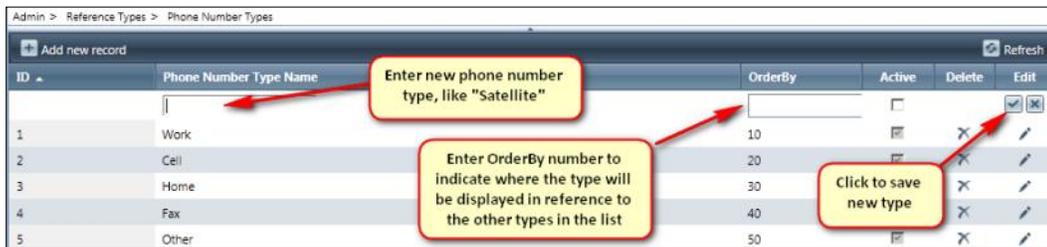


Figure 344 - Add New Phone Number Reference Type

3. Enter a number in the OrderBy field. This number will indicate where the new type will be displayed in reference to the other values in a drop-down list. For example, in Figure 304, if you entered "25" into the OrderBy field for the new value type, it would be displayed after Cell and before Home in a drop-down list.

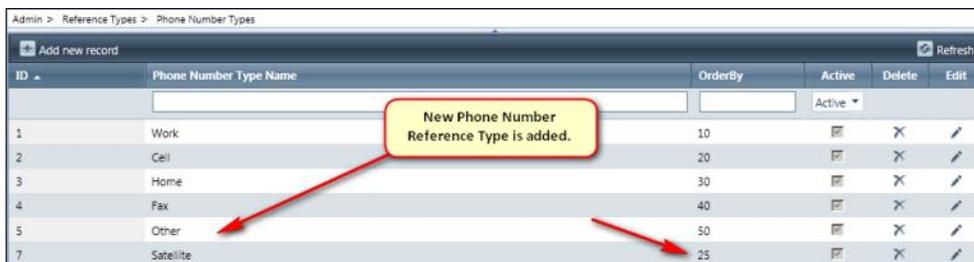


Figure 345 - New Reference Type Shown

- To verify the new reference type has been added correctly and appears where it should in a drop-down list, access the Address Book -> Contacts screen, expand a contact, select the Phone Numbers tab, click to Add New Record, then click the Phone Type drop-down list.



Figure 346 - Confirm New Reference Type Appears Correctly in Drop-down List

Follow the above procedure for adding other Reference Types.

## 9.4 File Location

The values in this list represent the locations where physical folders containing grant-related information reside. To add a new File Location:

- Access Admin -> File Location

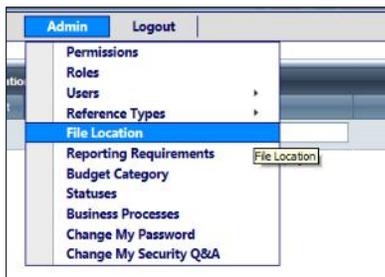


Figure 347 - Admin -> File Location

- Click Add New Record, enter new location into the File Location text field.

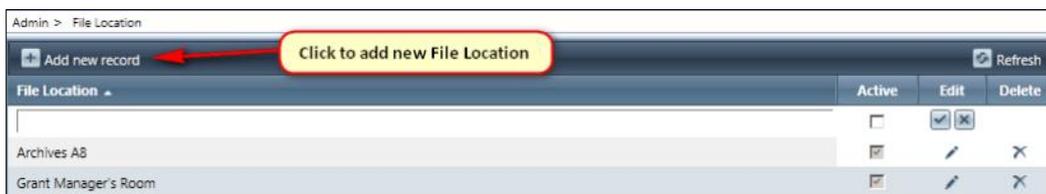


Figure 348 - Add New File Location

- Place a checkmark in the Active checkbox if you want the location to appear as active, then click the checkmark icon under Edit to save the new record.

## 9.5 Reporting Requirements

Reporting requirements are categories of information that are required by sub-recipients on a regular basis to maintain compliance with the terms of a grant award. When awarding a grant, you can specify which categories of reporting requirements, and which measures or questions within the categories that will be required of the sub-recipient:

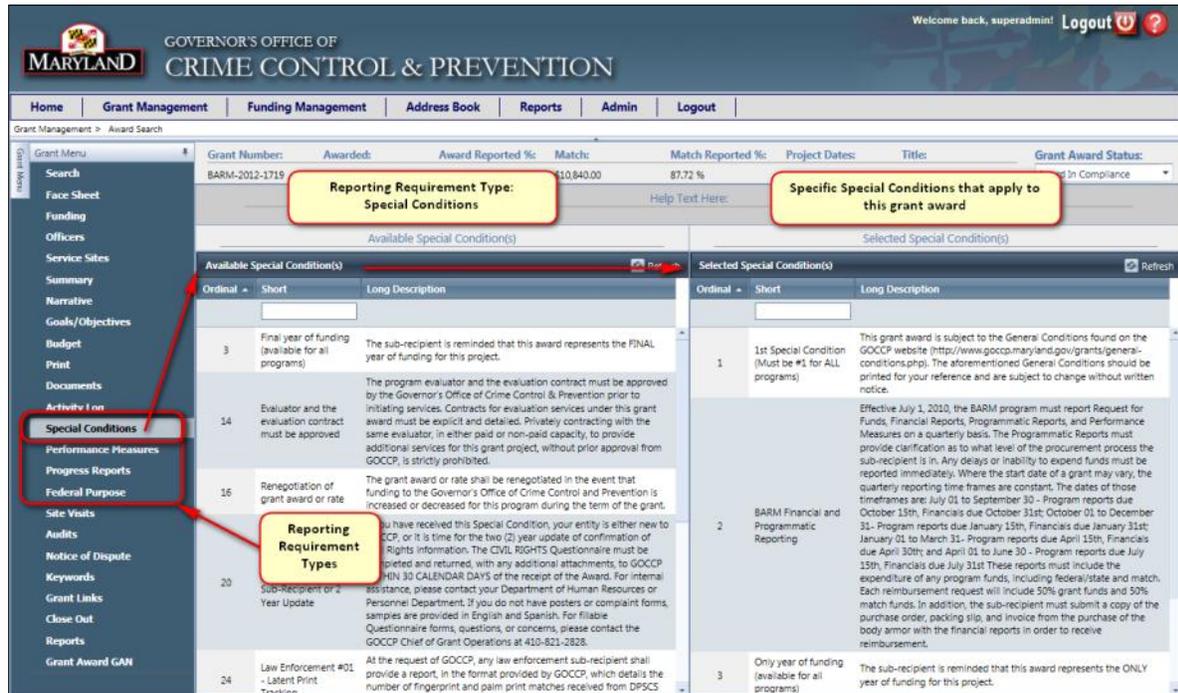


Figure 349 - Reporting Requirements Assigned to a Grant Award

In the Grant Menu and Award screen shown in Figure 309, the reporting requirement categories are shown in the menu down the left-hand side. Special Conditions is currently selected, so all of the special conditions that were added in Admin -> Reporting Requirements -> Special Conditions are displayed in the Available Special Conditions panel. By dragging a requirement from the Available panel to the Selected panel, that requirement is assigned to the current grant award. This works the same way for all of the reporting requirement categories:

Federal Purpose Areas	Defined Federal Program definitions that would be used to align a Grant Application and Award with Federal funding.
Performance Measures	The set of metrics that should be used to measure the implementation, effectiveness and success of a to be awarded or awarded Grant.
Progress Report Questions	Set of Questions whose answers represent a report of work accomplished during a specific time period.
Special Conditions	Set of rules and regulations that are specific to the funding source, funding year, and/or sub-award.
General Conditions	Rules and regulations for all sub-recipients regardless of funding source.

NOTE: The Reporting Requirements sub-menu has one item in addition to the requirement categories – the Reporting Requirement Types item. Use this to add a new category of requirement as follows:

1. Access Admin -> Reporting Requirements -> Reporting Requirement Types
2. Click Add New Record, enter new location into the File Location text field.

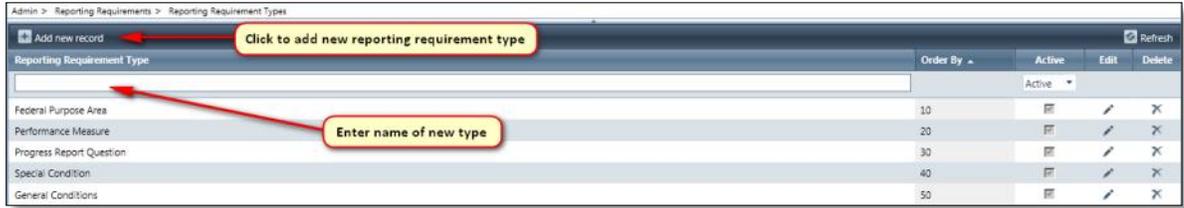


Figure 350 - Add New Requirement Reporting Type

3. Place a checkmark in the Active checkbox if you want the type to appear as active.
4. Enter a number in the OrderBy field. This number will indicate where the new type will be displayed in reference to the other types in the grant award screen.
5. Click the checkmark icon under Edit to save the new record.

### 9.5.1 Manage Reporting Requirements

You can manage the Reporting Requirement Types and items of each type via the Admin -> Reporting Requirements menu. General Conditions will be used in this example; all reporting requirements are added in the same manner.

1. Access Admin -> Reporting Requirements and select General Conditions from the sub-menu.



Figure 351 - Admin -> Reporting Requirements -> General Conditions

2. Enter a short description and long description, and click the checkmark in the lower-right corner to save the record.

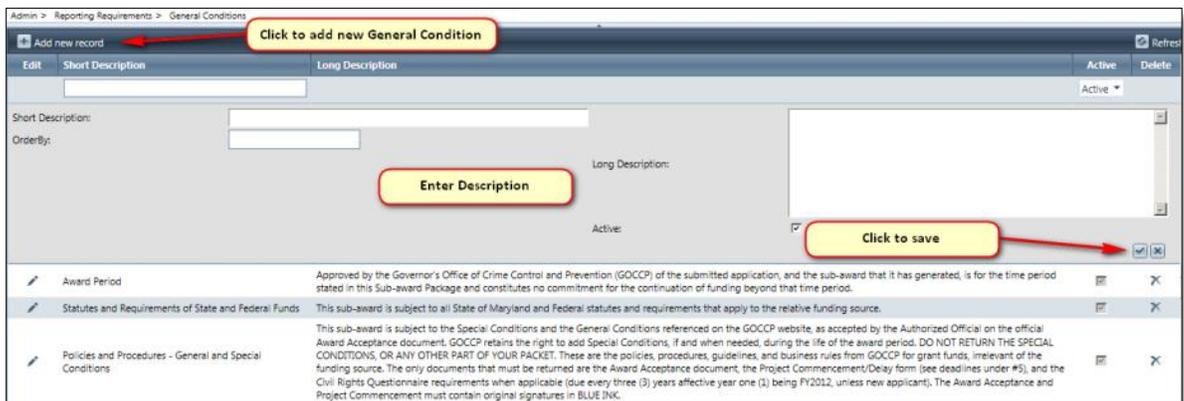


Figure 352 - Add New General Condition

- The new General Condition will now appear in the Grant Menu “Available General Conditions” panel.

## 9.6 Budget Category

The values in this list represent the categories of budget items that are required in a grant application:

App. Number:	Requested Funds:	Match Funds:	% of Project Cost:	Project Dates:
1999-JB-0001	\$78,630.00	\$0.00	0.00 %	09/01/2000 - 08
Current Grant Application budget (#3)				
Help	Budget Category	Total Grant Funds	Total Cash Match	
?	Personnel	\$64,355.00	\$0	
?	Operating Expenses	\$6,350.00	\$0	
?	Travel	\$1,775.00	\$0	
?	Contractual Services	\$0.00	\$0	
?	Equipment	\$0.00	\$0	
?	Other	\$6,150.00	\$0	

Figure 353 - Budget Categories shown in Grant Application Menu

To add a new Budget Category:

- Access Admin -> Budget Category

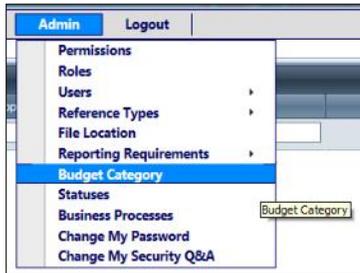


Figure 354 - Admin -> Budget Category

- Click Add New Record.

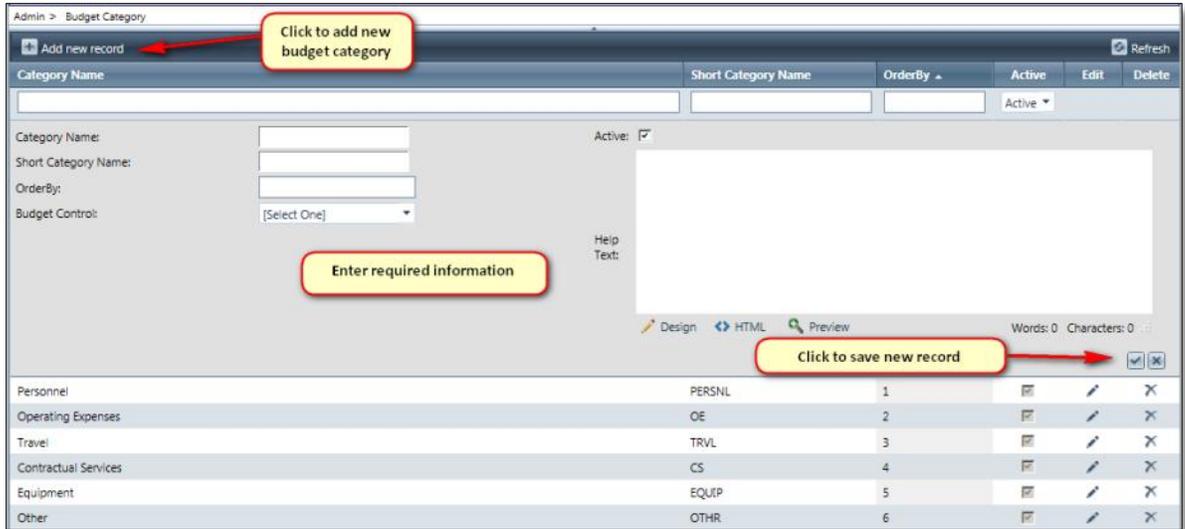


Figure 355 - Add New Budget Category

3. Enter a name for the new category, and a short name that will represent the category.
4. Enter text into the Help Text field that will appear as “Tool-Tip” help in a popup window when a user clicks the help button.
5. Click the checkmark icon in the lower right corner to save the new Budget Category.

## 9.7 Change My Password

If you want to change your GMS password at any point:

1. Access Admin -> Change My Password



Figure 356 - Admin -> Change My Password

2. Enter your current password. Then enter your new password, and re-enter it into the Confirm New Password field.

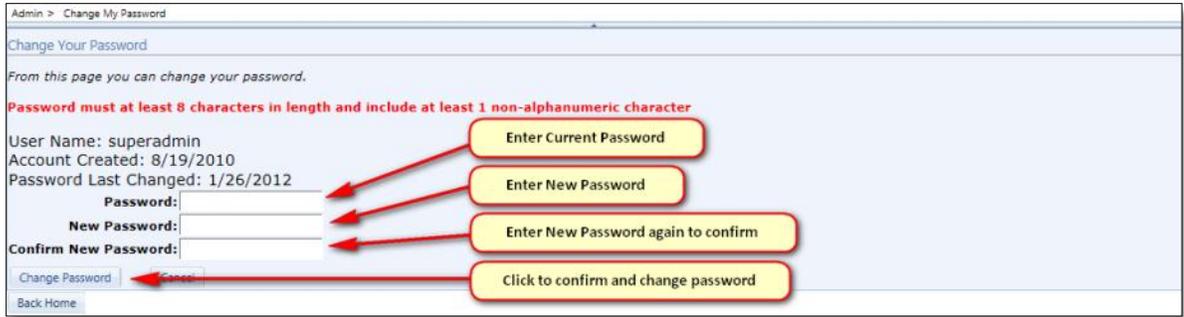


Figure 357 – Enter New Password

3. Click the Change Password button.

## 9.8 Change My Security Q&A

Security Q&A offers an added level of protection to your GMS account. You will be asked for the answer to your security question if you require technical support. If you want to change your GMS Security Question and Answer at any point:

1. Access Admin -> Change My Security Q&A

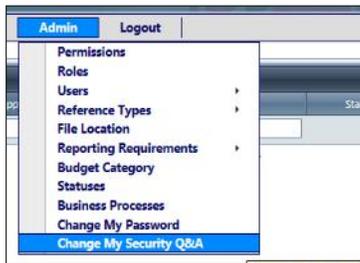


Figure 358 - Admin -> Change My Security Q&A

2. Enter your current password. Then enter your new question and the answer to your new question.

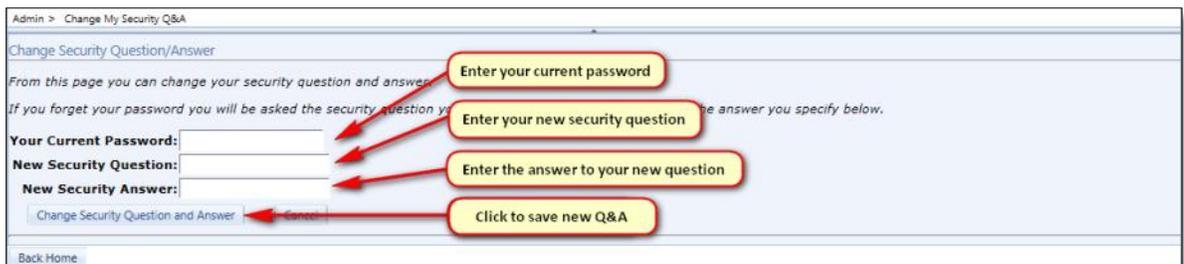


Figure 359 – Enter New Security Question and Answer

3. Click the Change Security Question and Answer button.

## 10 Reports

GMS provides internal users with the ability to print a wide variety of funding management, grant management, and administrative reports from one central location.

1. Click Reports from the GMS Home Screen to bring up the Reports screen.

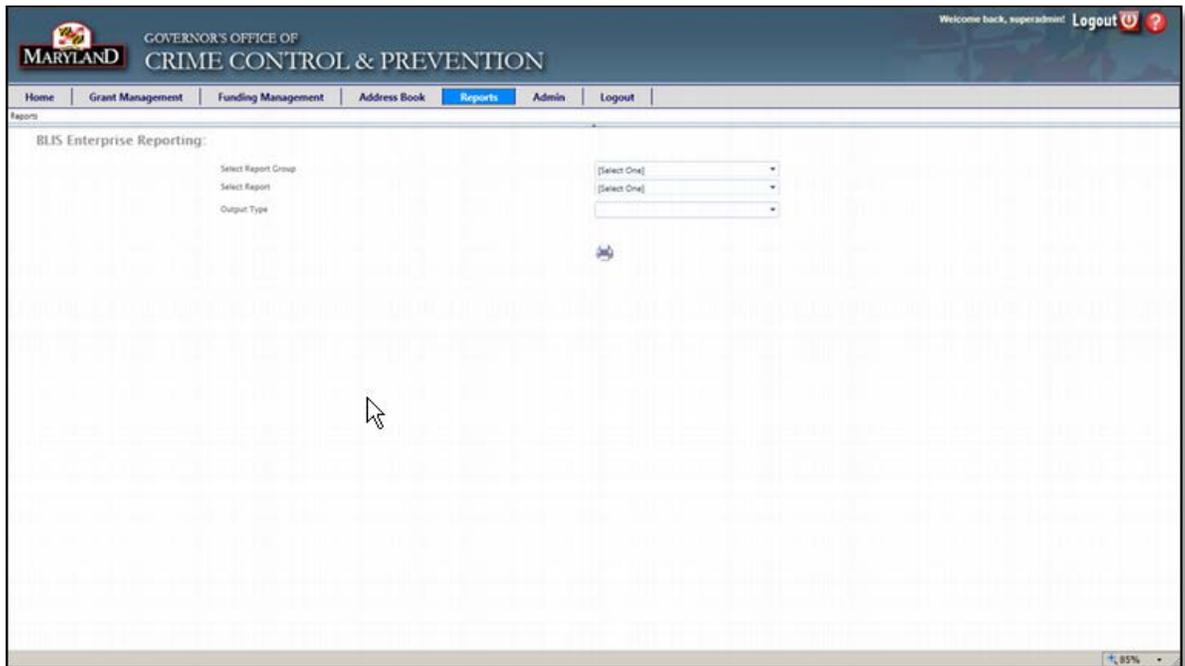


Figure 360 - GMS Reporting Screen

The reports screen is played out in such a way that the options that are displayed depend on the selection of the first category.

2. Begin by clicking the Select Report Group drop-down list. You are presented with the four report categories:
  - Admin Reports
  - Grant Applications
  - Grant Awards
  - Program Funds
3. Select a reporting group, for example Grant Awards

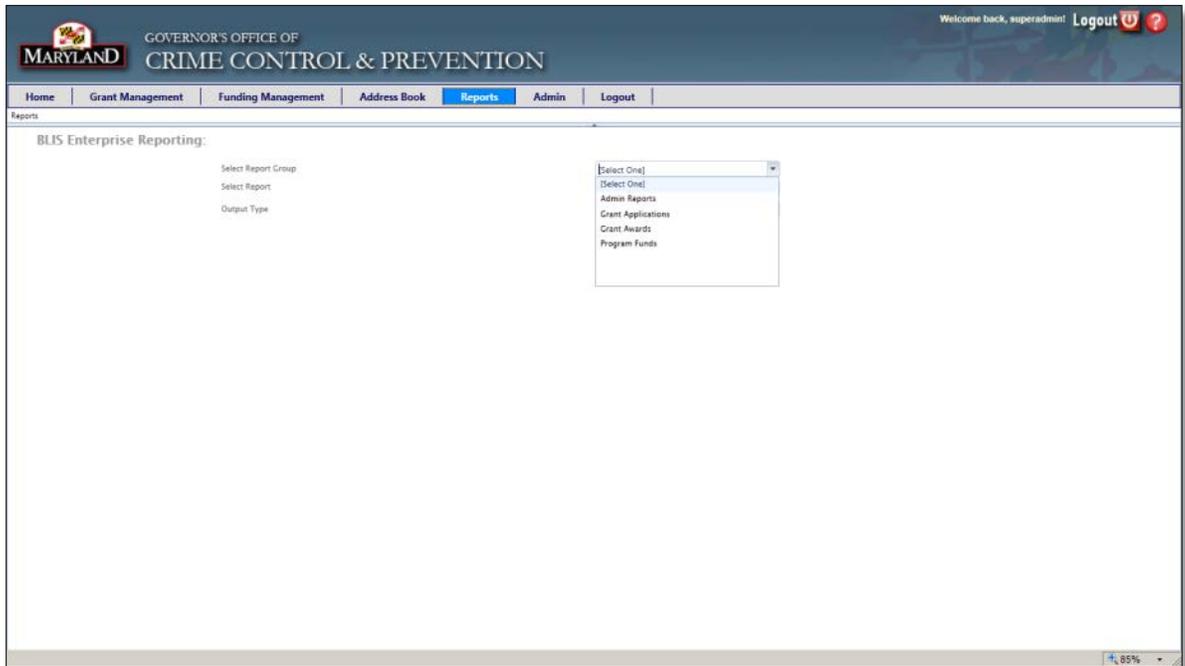


Figure 361 - Reports - Select Report Group

4. Based on the report group you selected, the list of reports available for that group will appear in the drop-down menu next to Select Report.

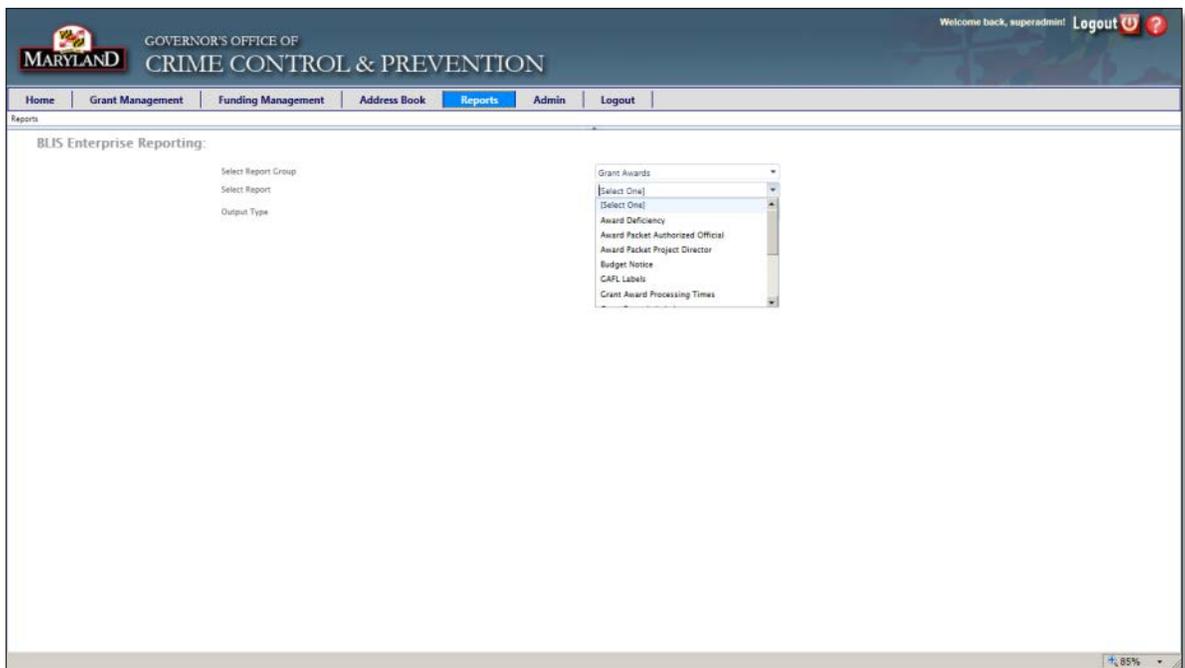


Figure 362 - Reports - Select Report Type

5. Click the drop-down menu next to Select Report and click to select the report, for example Award Deficiency

- Based on your report selection, different selection criteria are presented to you in the form of selection boxes:

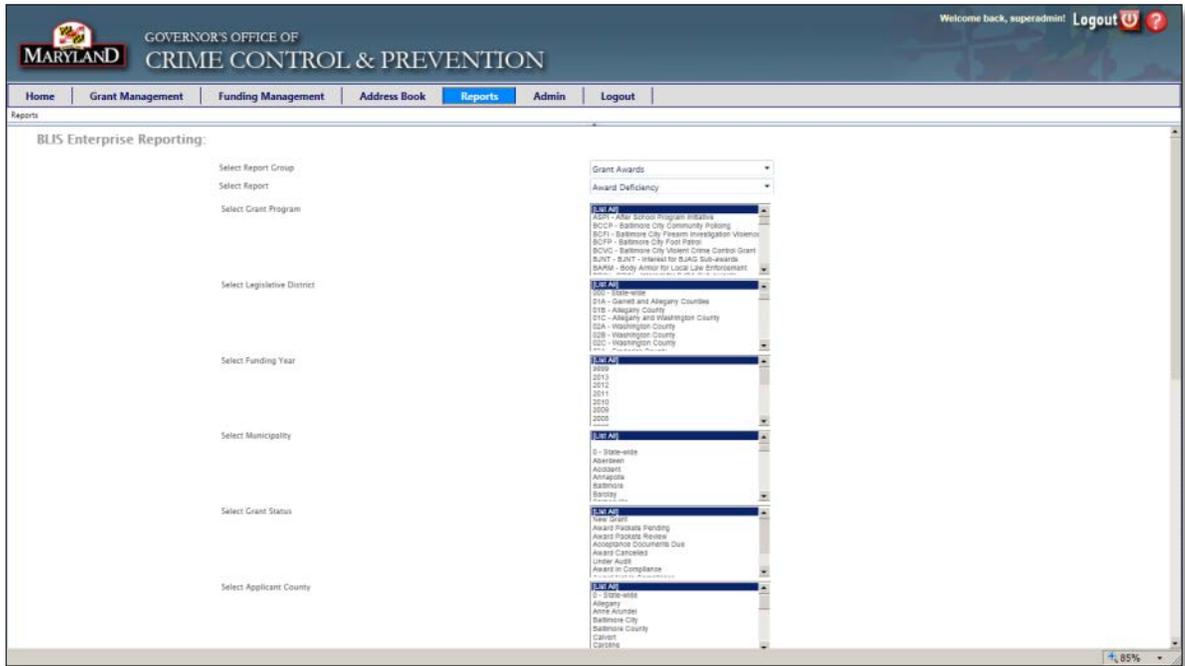


Figure 363 - Reports - Select Reporting Criteria

- Make your selections for each criteria by clicking on the drop-down list beside each criteria category.
- Scroll down the page to be sure you've covered all criteria selection.
- If you want to create the report for a specific Grant Award (works for grant applications as well) you can enter the Award # in the Grant Award Number field near the end of the list:

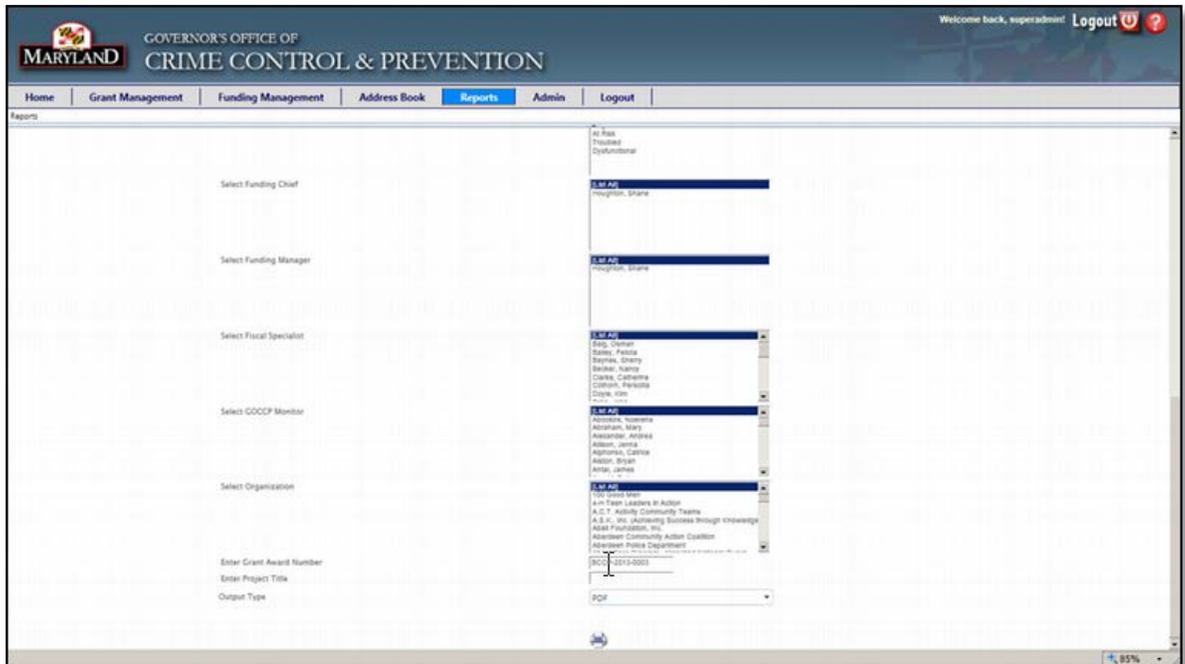
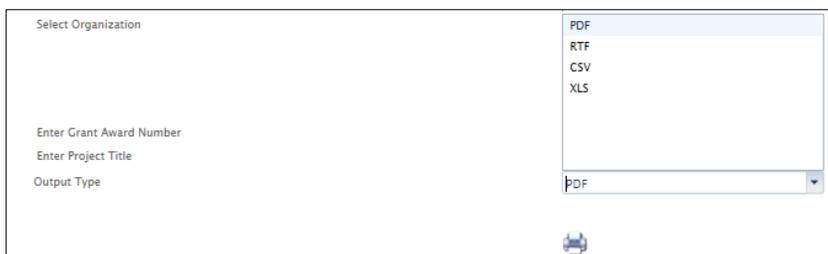


Figure 364 - Report on a specific Grant Award or Application Number

10. Click in the Output Type drop-down list and select:

- PDF (Adobe Acrobat Format)
- RTF (Rich Text Format)
- CSV (Comma Separated Variable Format)
- XLS (Excel Worksheet Format)

Then click the Printer icon to print the report.



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