Grants System Help Guide

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Basic Navigation

Login

1. Log in at https://www.ebs.nc.gov/ (Live September 5th, 2017). DOT recommends you use Internet Explorer as your browser.

2. Enter your Username and password and click **Log On**.

3. At the main applications screen, select **CRIS / NC Grants**.
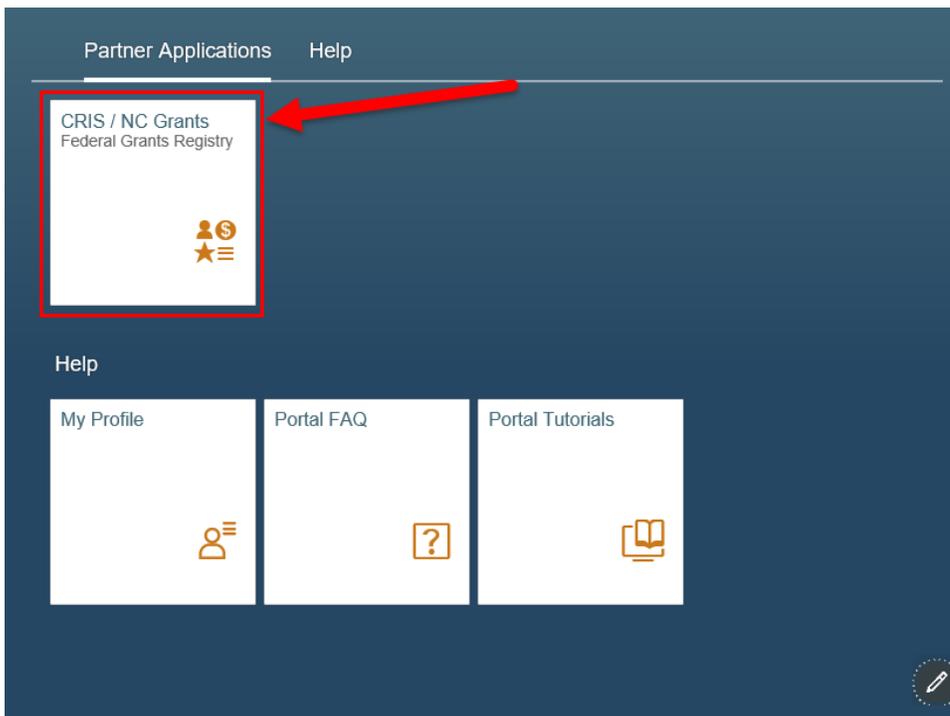
Home Page & Navigation

Once you click on "CRIS/NCGrants," a new window will appear that looks like the screen below.

On the left-hand side of the screen, there is a list of quick links for "Home," "Help," and "Recent Items." This display remains viewable throughout the use of the application. Each of the links does the following:

- Home: Clicking on this will bring you back to the home page.
- Help: Clicking on this will bring you to a screen with Help tools.
- Recent Items: Underneath this is a list of the most recent programs you edited.

In the main section of the screen, you will see a list of functions under "Search." Depending on whether you have access to CRIS and/or NCGrants functions, your list may have different functions listed below.

On the top right-hand side of the screen, there is a link for saved searches. Once you have created a saved search, it will appear in this list, and you will be able to click on it, quickly opening the search.

When using the application, you can click on "Back" to go back anytime.

If you only have access to CRIS functions, only the top two functions will appear on the list. If you only have access to NCGrants functions, only the bottom three functions will appear on the list. If you have access to both CRIS and NCGrants functions, the entire list will appear as shown.

Click on the arrow to minimize the left-hand screen.
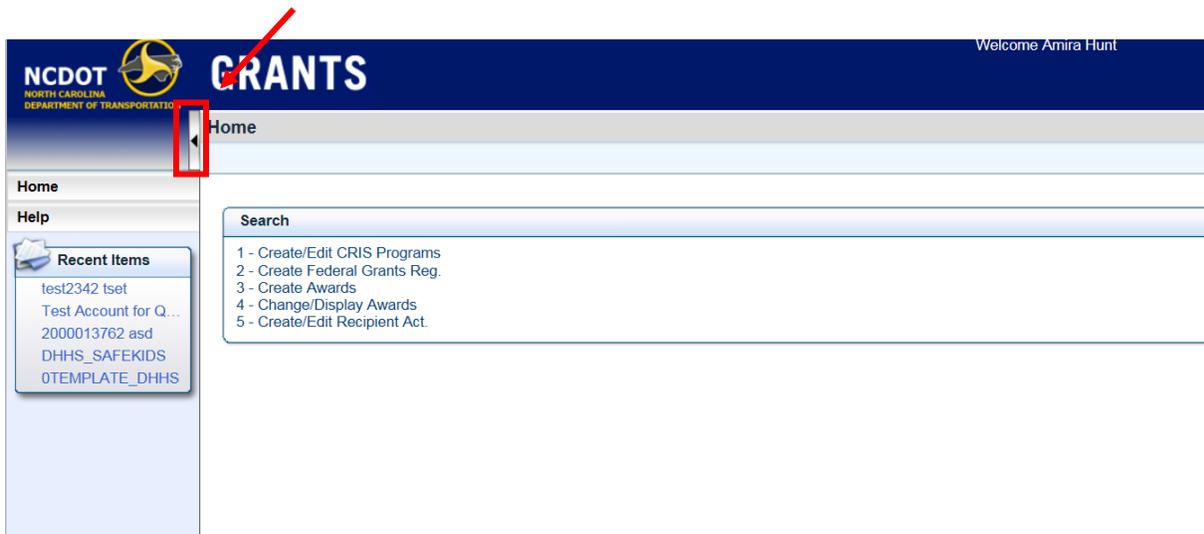
To re-open the left-hand screen, click on the same arrow.
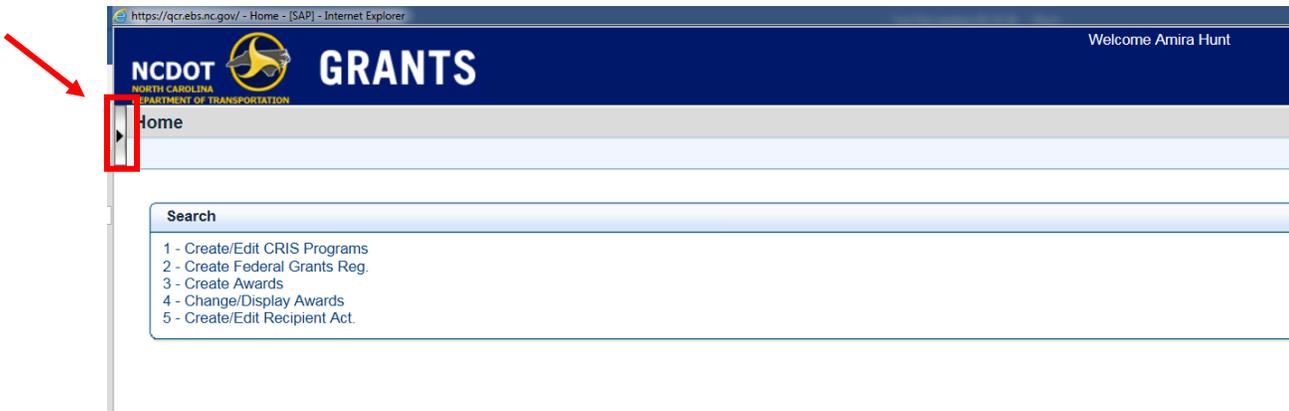
Click on the arrow to open a section.

Actions	Text Type	Text
✏ 🗑	Expected Outcomes	25 financial key indicators identified and addressed with critical access hospitals
✏ 🗑	Specific Restrictions	Funds are provided to create a Learning and Action Network to improve financial opera

▼ **Notes**   📋New

▼ **Award/Payment Amounts**

Item No	Description	Authorized Amount
10	Awards	

▶ Counties of Service associated with this Grant

▶ Transaction History

Click on expand to expand or collapse to see additional/less rows in the list. To see more table rows of the list, click on forward/back or the other page numbers.

▼ **Counties of Service associated with this Grant**   Edit List

Actions	County
🗑	Catawba
🗑	Ashe
🗑	Avery
🗑	Bertie
🗑	Bladen

⊞ Expand   ◀Back   1   2   3   4   5   Forward▶

Search Function

The search function allows users to search for a program/grantee/award by using multiple criteria. For example, when searching for a grantee, you can search with the tax ID, name, and/or account ID. Enter your search into the fields in the third column and click on the search button.
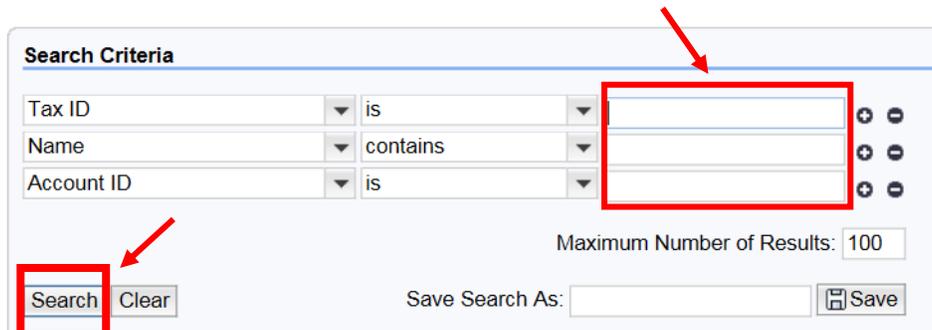
You can change the search criteria and filters by clicking on the drop-downs available. For example, when searching for a recipient, when you click on the search criterion of tax ID, you can see that it can be switched to other selections (see below).
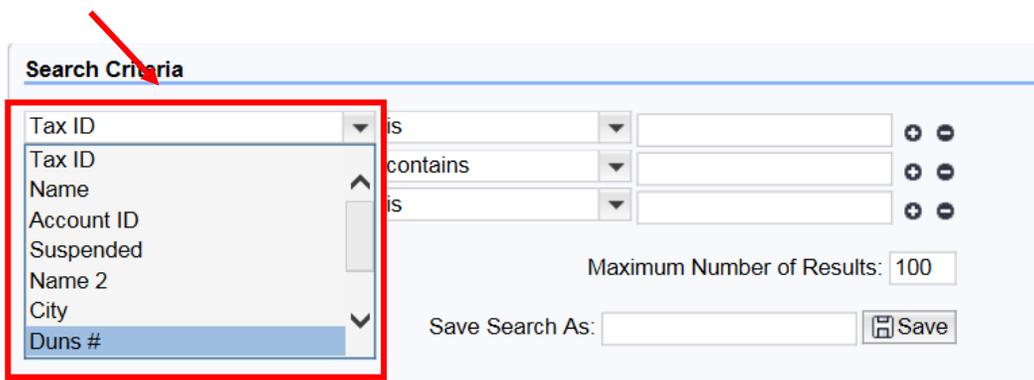
You can also change the filters. When using the search function, make sure to select the appropriate filter based on your search. For example, if you are searching for a grantee but only know part of its name, you may want to select "contains." If you select, "is," the search function will look for an exact match.
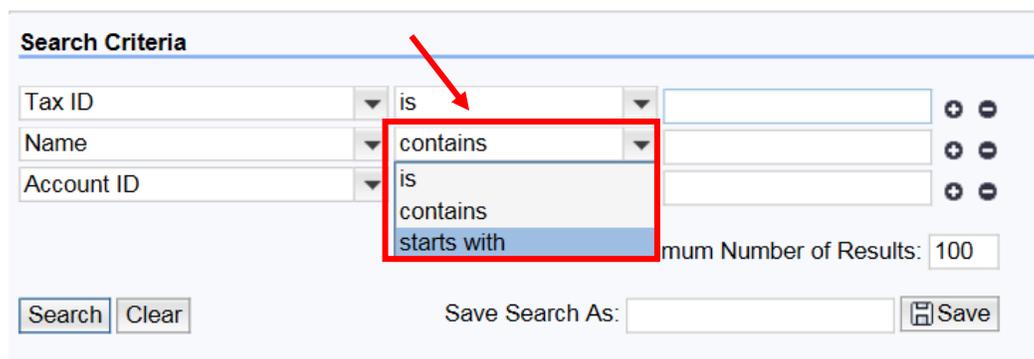
When searching a grantee using its Tax ID, make sure to include the hyphen (i.e. xx-xxxxxxx).

The search functions are set to a default based on what most users will find most useful. However, the search criteria can be modified. To add a new search field, click on the plus icon.

After clicking on the plus icon, a new row will appear with another search criterion (see below).

To delete a search field, click on the negative icon.

To save a search, type out how you would like the search saved as in the "Save Search As" field and click on "Save." It will now show up in your saved searches field at the top of your main navigation page. For example, if I wanted to run reports on all awards to the CRIS program ID of DHHS_2400, I could save a search with that criteria.

Note: Make sure to type out the keyword in the search before hitting save.

It now shows up in the "Saved Searches" field.

Customized Display Data

The system allows users to display charts, export data, and customize tables based on user preferences.

- To create a chart, click on the chart icon.
- To export a table into excel, click on the spreadsheet icon.
- To modify a table layout, click on the tool icon on the top right of the table.

Result List
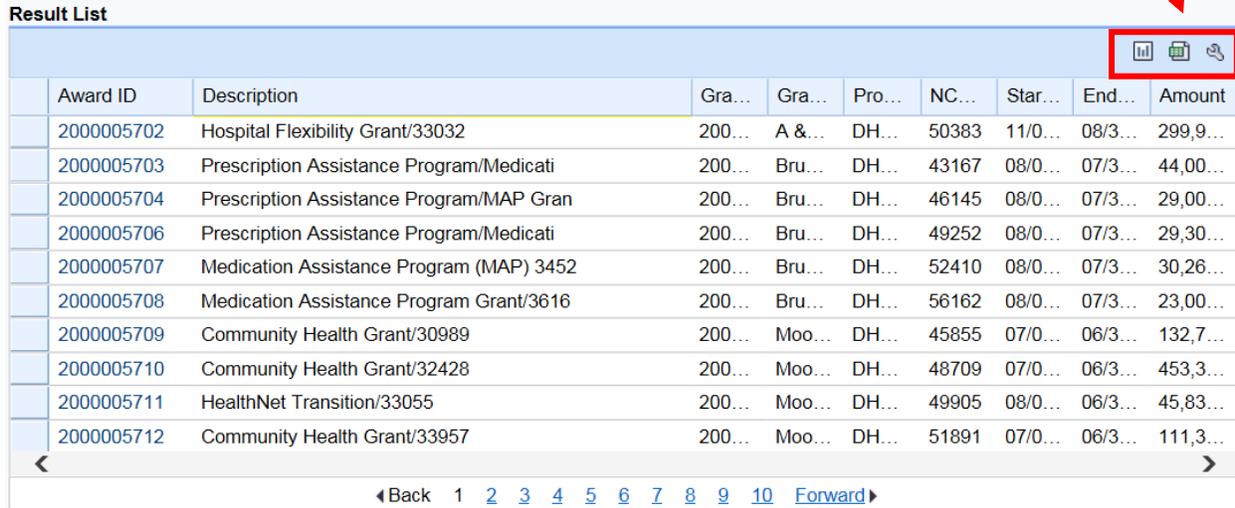
	Award ID	Description	Gra...	Gra...	Pro...	NC...	Star...	End...	Amount
	2000005702	Hospital Flexibility Grant/33032	200...	A &...	DH...	50383	11/0...	08/3...	299,9...
	2000005703	Prescription Assistance Program/Medicati	200...	Bru...	DH...	43167	08/0...	07/3...	44,00...
	2000005704	Prescription Assistance Program/MAP Gran	200...	Bru...	DH...	46145	08/0...	07/3...	29,00...
	2000005706	Prescription Assistance Program/Medicati	200...	Bru...	DH...	49252	08/0...	07/3...	29,30...
	2000005707	Medication Assistance Program (MAP) 3452	200...	Bru...	DH...	52410	08/0...	07/3...	30,26...
	2000005708	Medication Assistance Program Grant/3616	200...	Bru...	DH...	56162	08/0...	07/3...	23,00...
	2000005709	Community Health Grant/30989	200...	Moo...	DH...	45855	07/0...	06/3...	132,7...
	2000005710	Community Health Grant/32428	200...	Moo...	DH...	48709	07/0...	06/3...	453,3...
	2000005711	HealthNet Transition/33055	200...	Moo...	DH...	49905	08/0...	06/3...	45,83...
	2000005712	Community Health Grant/33957	200...	Moo...	DH...	51891	07/0...	06/3...	111,3...

◀Back   1   2   3   4   5   6   7   8   9   10   Forward▶

You can also change the settings so that additional table rows are displayed.

1. Select one of the following radio buttons:
   a. Scrolling – allows additional table rows to be displayed by moving a scroll bar on the right side of the section.
   b. Paging – allows additional table rows to be displayed a page at a time.
2. Enter the number of rows to display in the Number of Visible Rows Before Scrolling or Number of Visible Rows Before Paging field, if desired.

Once you click on the tool icon, a new window will open such as the following. To add categories to the table, select the category you want displayed from the available columns section and click on the right-hand arrow to move it to displayed columns. To remove categories to the table, select the category you want removed from the displayed columns section and click on the left-hand arrow to move it to available columns.

You can also move columns up or down by selecting the category and clicking on Up or Down located at the top of the section.

You can also change the settings so that your table is sorted by a specific column in either ascending or descending. Click on the Sort By drop-down and select which category by which you would like to sort and select ascending or descending.

Click save once you are finished. To reset it to default, click on Reset to Default.

Add a CRIS Program

1. Click **Create/Edit CRIS Programs**.
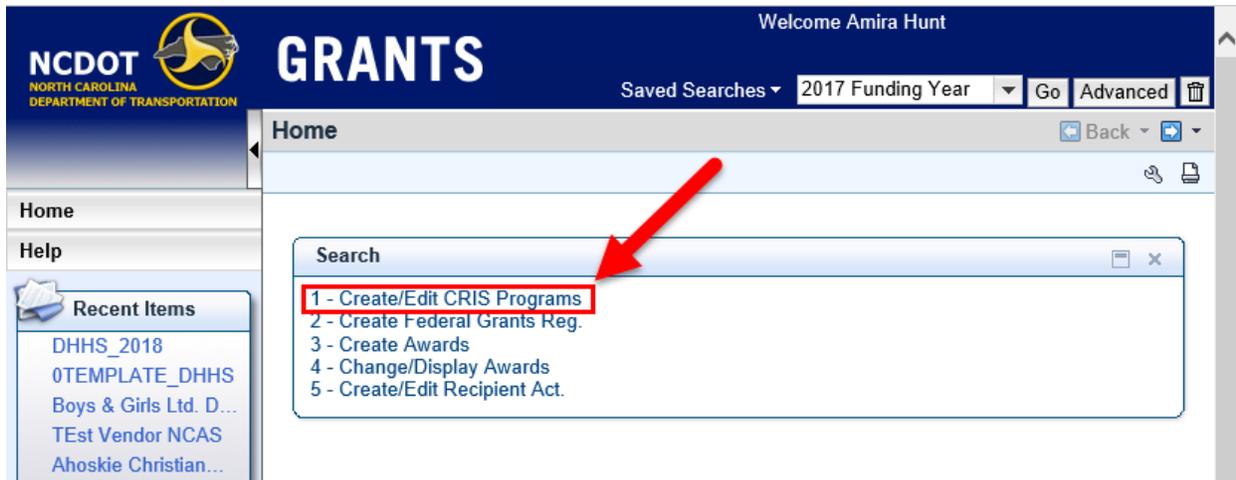
2. You will arrive at the main programs screen. Before you can create a new CRIS program, you must first open your agency's template and then copy it. To do that, click the Search button.
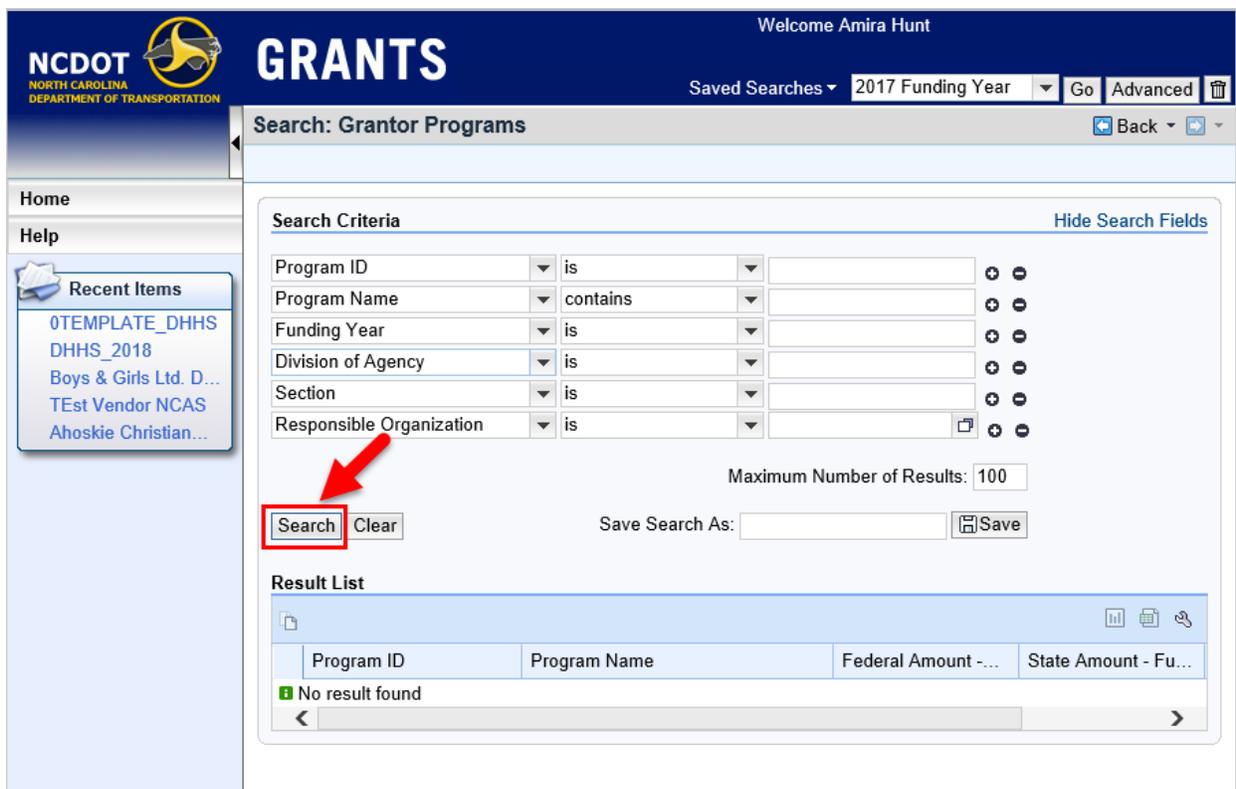
3. Your agency's template should appear as the first record in the Result List (*for this example, I am logged in as an HHS user*). Click on the template's link to open it.

4. Once your template opens, you will need to copy the template by clicking the **Copy icon** (   ) as shown below.

5. A blank form for creating your new CRIS program will display on the screen. You may see alerts similar to the ones highlighted below. Please disregard these as they will disappear as you enter the necessary data into the form.

6. **Program ID** – The new CRIS application requires you to enter a <u>unique</u> Program ID that is <u>no longer than 24-characters</u> (*the old CRIS program automatically generated a Program ID (CRIS ID) for you*). We suggest you devise an ID that consists of your agency's acronym and abbreviated program name (for example, "*DHHS_RuralHousing*"). If you attempt to create a Program ID that is already exists, you will receive an error message.

7. **Program Name** – Enter the grant program's name.

8. **Department / Agency** – This field will be pre-populated to the agency to which you are assigned and cannot be edited.

9. **Section** – Enter a Section for your agency if appropriate.

10. **URL Path** – Enter the URL to the website where visitors may learn more about the grant program.

11. **Funding Year –** Enter the funding year for which you are reporting.

12. **Status**: Status options include:

   a. **Active** (default) – These are active grant programs and will appear on the public facing CRIS site.

   b. **Marked for Deletion** – These are programs that no longer exist and for which there are no open awards. These programs will not appear on the public facing CRIS site.

   c. **Inactive** – These are programs that are inactive but may still have open awards. These programs will not appear on the public facing CRIS site.

13. **Divisions of Agency** (<u>DHHS only</u>) – Select the appropriate Division for the grant program from the drop-down list.

14. Enter fund amounts, in dollars, for this grant program.

15. **Type of Assistance** – There are 15 categories used by the Catalog of Federal Domestic Assistance (CFDA). To select the type of assistance, click **Insert**, and then click the **down-pointing arrow** to view the list of assistance categories.

16. Make your selection. If you need to select more than one, just repeat by clicking **Insert** to select an additional type. Once you are finished, your selections will be listed under Type of Assistance.

17. **Notes** – The notes section contains the grant program description and information on grantee eligibility.
    a. **Description** – Click **Enter Description here** to enter information about the grant program.

A window will open that allows you to enter your text.

Once you are finished entering your description, click the **Back** button to return to the main screen.

b. **Grantee Eligibility** – Click **Enter Description here** to enter grantee eligibility information.

A window will open that allows you to enter your description. You may enter text directly or copy and paste from Word or Notepad.
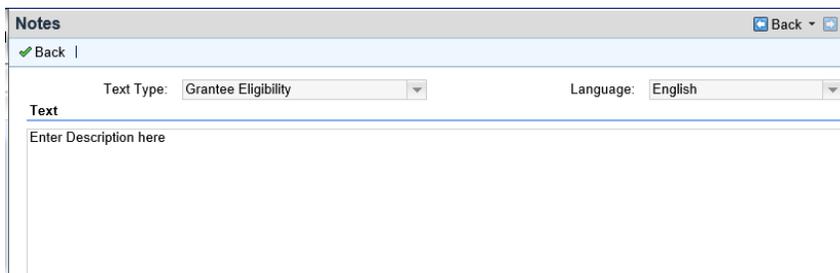
Once you are finished entering your description, click the **Back** button to return to the main screen.

18. **CFDA** (Catalog of Federal Domestic Assistance) - CFDA numbers are assigned to **federal** domestic assistance programs and can be found on award notification letters. If federal monies support this grant program, please enter the appropriate CFDA number(s) by clicking **Insert**.

19. Then enter the CFDA number in the field provide and then press the Enter key on your keyboard.

20. The CFDA Number along with its Program Title will appear in the CFDA list as shown below.
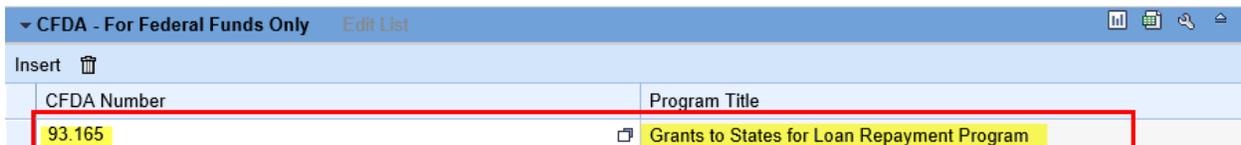
21. **Keywords** – The public facing CRIS site will use the keywords you select here to assist users when searching grant programs.

To select keywords from the drop-down list, click **Insert** and then select the drop-down arrow to reveal the list. Select the appropriate keyword. Repeat to select multiple keywords.
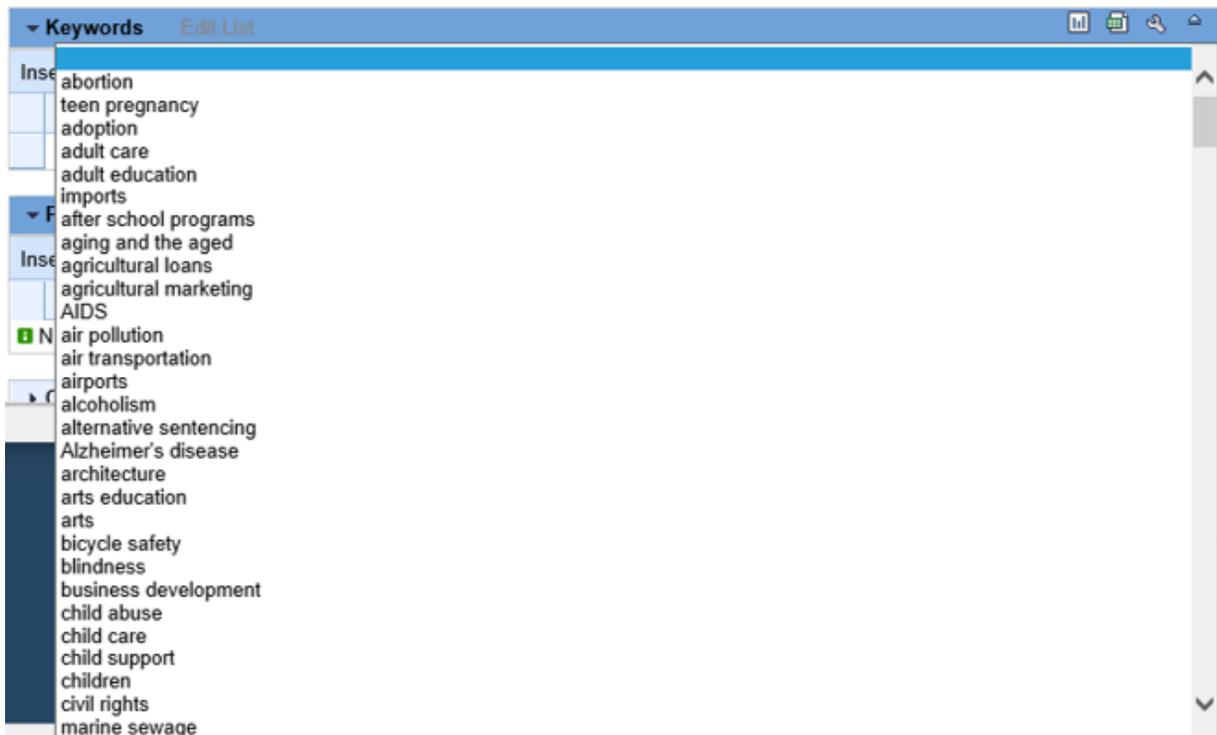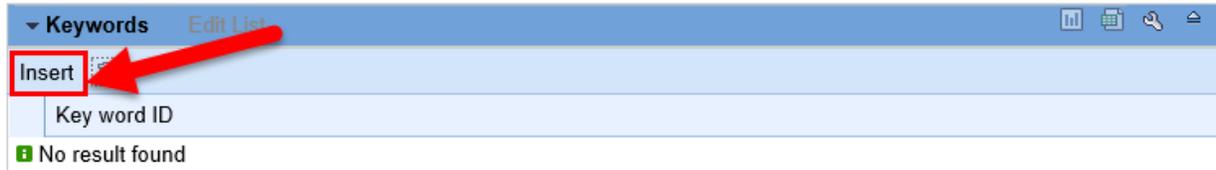
22. Once you are done, your keyword(s) will be listed as shown below.

23. **Fund Details** – Select the appropriate budget code and fund code combination from the drop-down list. To start, click **Insert**.

Then click to open the drop-down list of budget codes for your organization. Select the appropriate budget code.
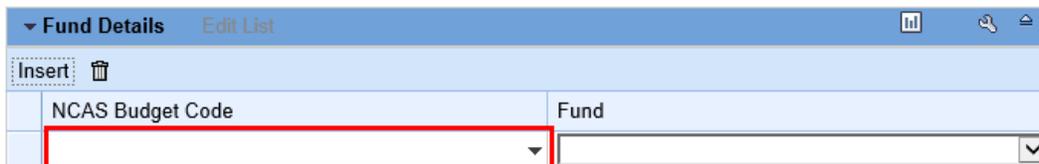
Now click to open the drop-down list of fund codes for your organization. Select the appropriate fund code.

24. Once you are done, click **Save** to save your record.
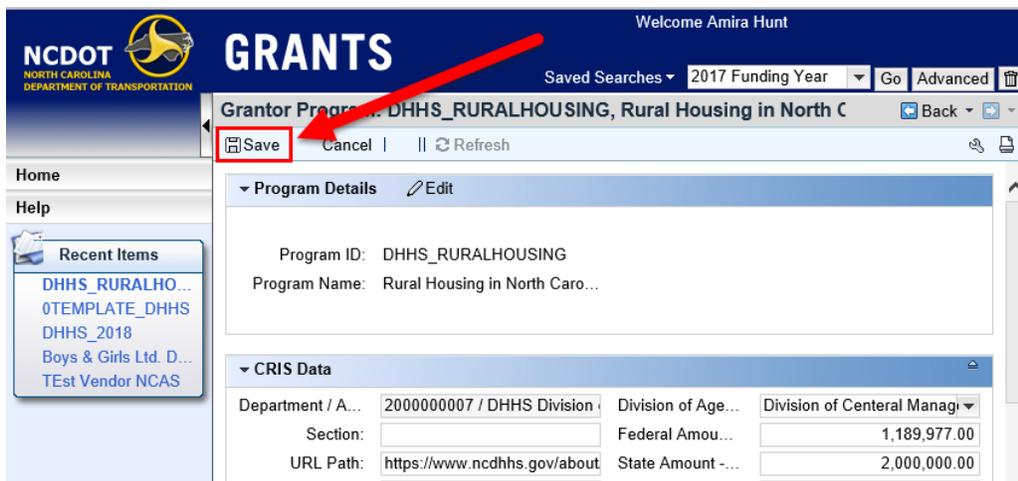
Add a Record to the Federal Grants Registry

The Federal Grants Registry is used to report grants your agency receives from the Federal Government. To make purchases against the grant through e-Procurement and payments through NCAS, you will need to have entered the grant in the Federal Grants Registry.

1. Click **Create Federal Grants Reg**.
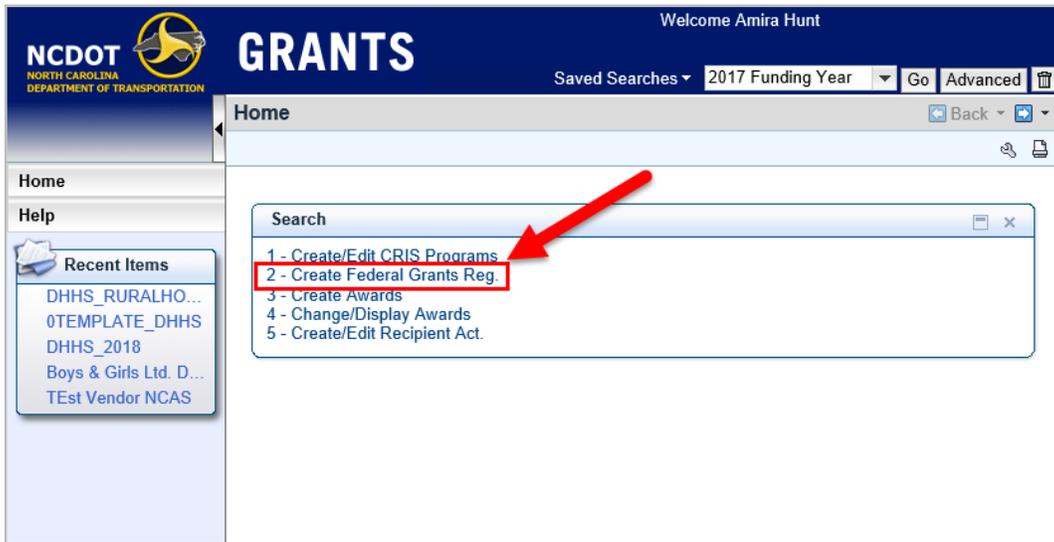
2. You will arrive at the Maintain Federal Registry screen. Click **New** to enter a new federal grant.
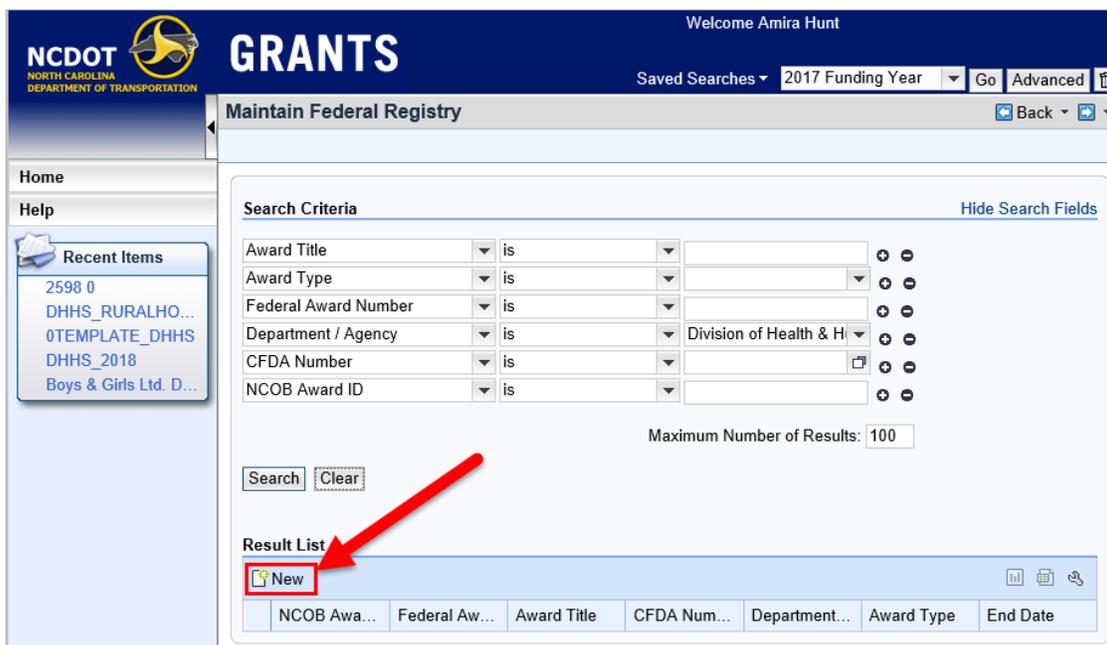
3. **NCOB Award ID** – This is a system-generated number and cannot be edited.

4. **Federal Award Number** – Enter the federal award number. The Federal Award Number can be found on the award notification letter.

5. **Award Title** – Enter the title of your federal award.

6. **CFDA Number** - CFDA numbers are assigned to **federal** domestic assistance programs and can be found on award notification letters.

7. **Department / Agency** – This field will be pre-populated for your particular agency.

8. **Award Type –** Select the award type for this federal grant. Your options are:
    a. Block Grant
    b. Co-operative Agreement
    c. Formula Grant
    d. Project Grant

9. **End Date –** Enter only when award ceases to exist and all agency payments using it have been complete. This will remove it from the list of federal grants available on the e-Procurement menus. For now, leave it blank and then come back when the grant ends and all agency payments using it have been completed.

10. Click **Save** to finish.

Create Awards

1. To create an award, click on **Create Awards** on the Home Page.
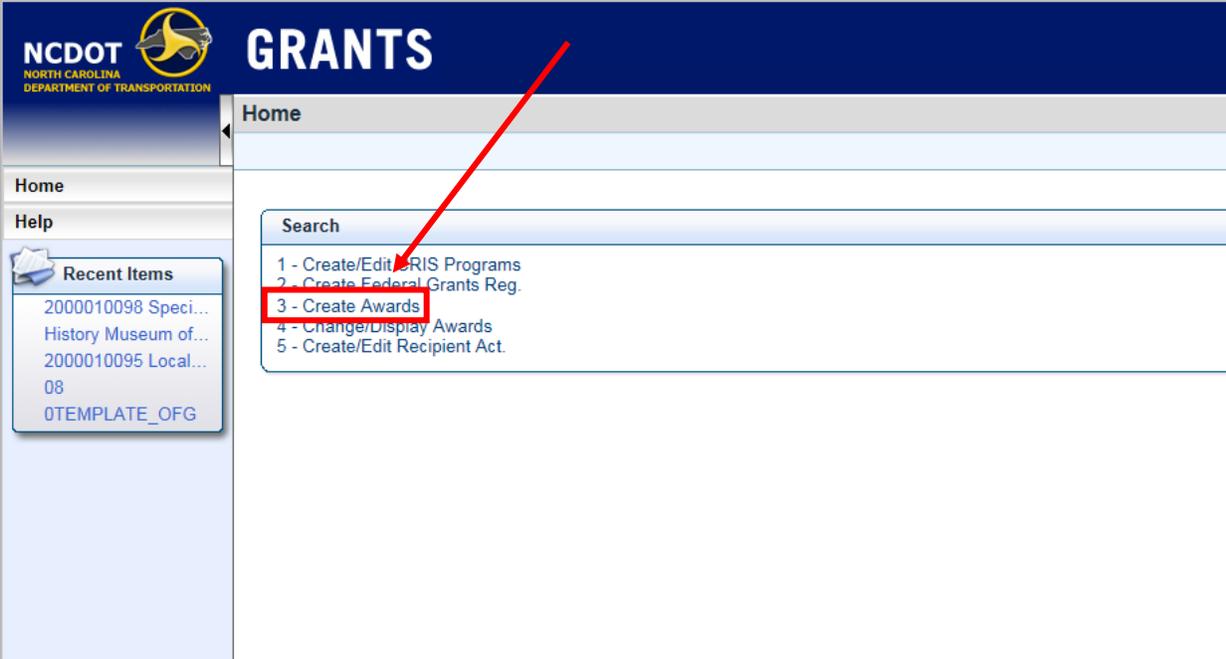
2. Once you click on Create Awards, the following screen will appear, with the following sections:
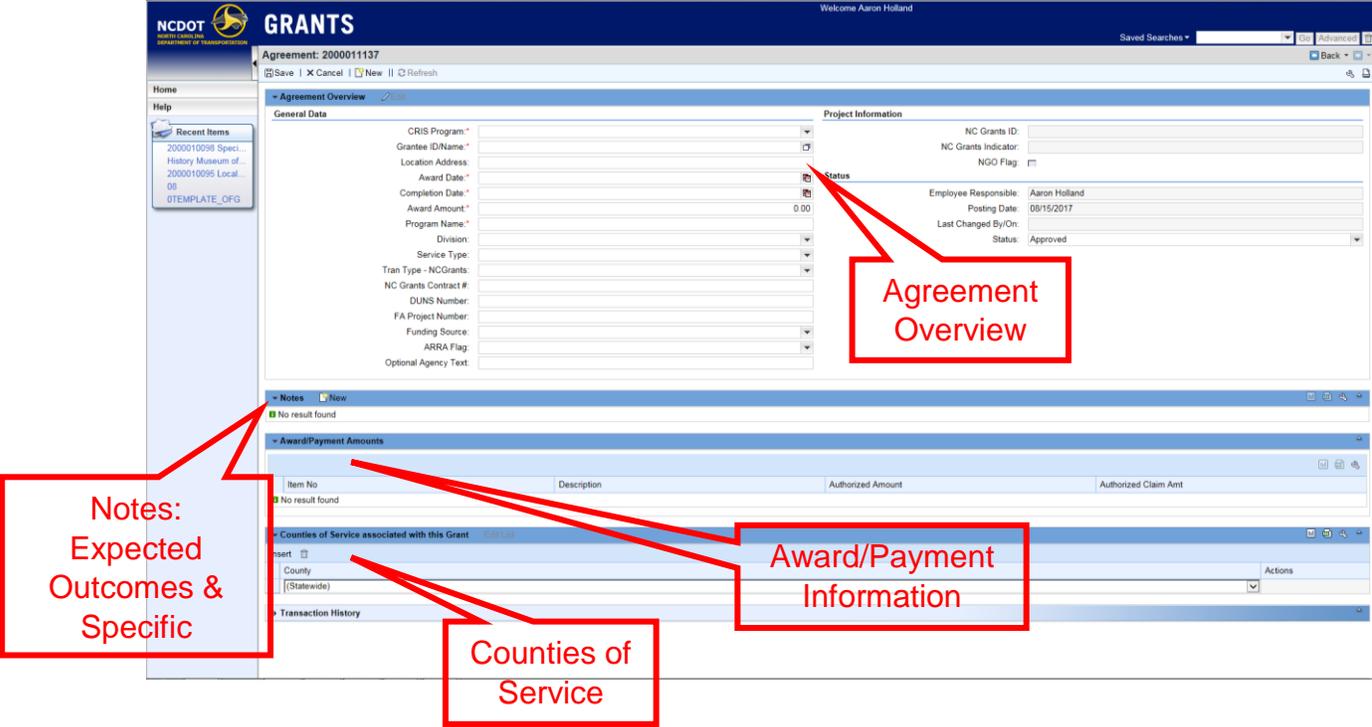
Agreement Overview

The first section under Create Awards is the Agreement Overview. It is located at the top and includes three sub-sections – General Data, Project Information, and Status.

1. **CRIS Program:** First, under General Data, select the **CRIS program** from the list. All CRIS programs created by your agency will appear in the list.

   Note: If you select the incorrect program, you will not be able to select a different one. Instead, click on cancel located at the top and start over.

2. **Grantee ID/Name** – Select the grantee. When you click on the box in the right-hand side of Grantee ID/Name, a screen will open, such as the one below, where you can search for the grantee by name or tax ID. Select the correct grantee.

Note: To see all grantees, hit enter/search leaving the search criteria blank. To search by tax ID, make sure to include the hyphen (i.e. xx-xxxxx). For more information on how to use search functions, see Search Function section. If grantee is not in the system, they will need to be added first under Create/Edit Recipient Acct.

3. **Location Address** – Once you select the grantee, the address of the grantee will populate in the "Location Address" field. If a grantee has more than one location, a window such as the following will show up. Select the correct location.
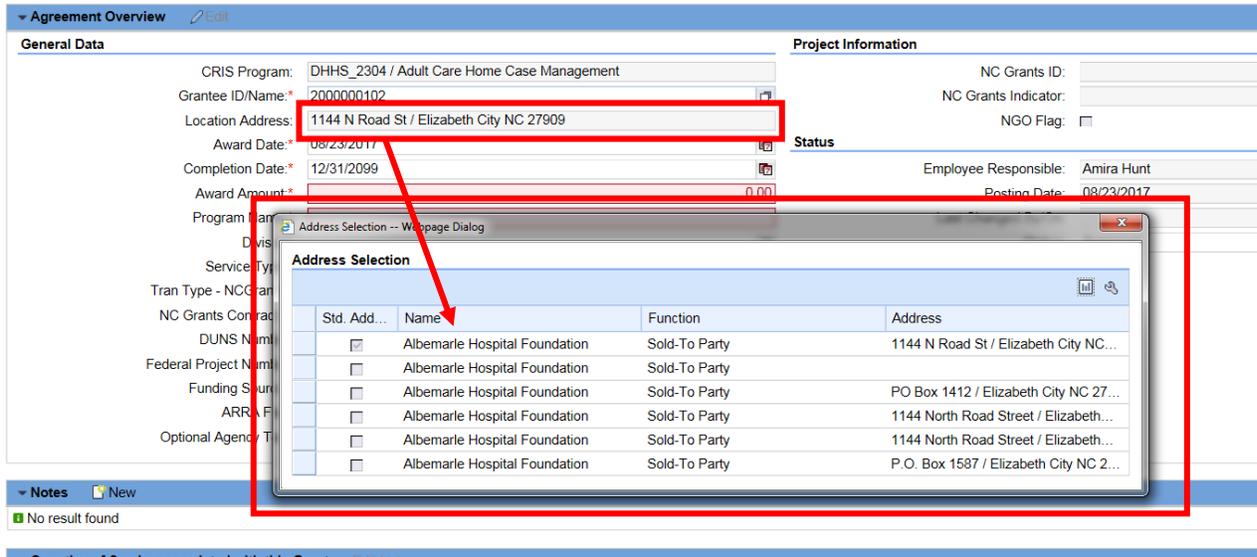
4. **Award Date/Completion Date –** Award date automatically fills in with the current date. Completion date automatically fills in with 12/31/2099. To change the dates, click on the box on the right-hand side and select the correct dates.
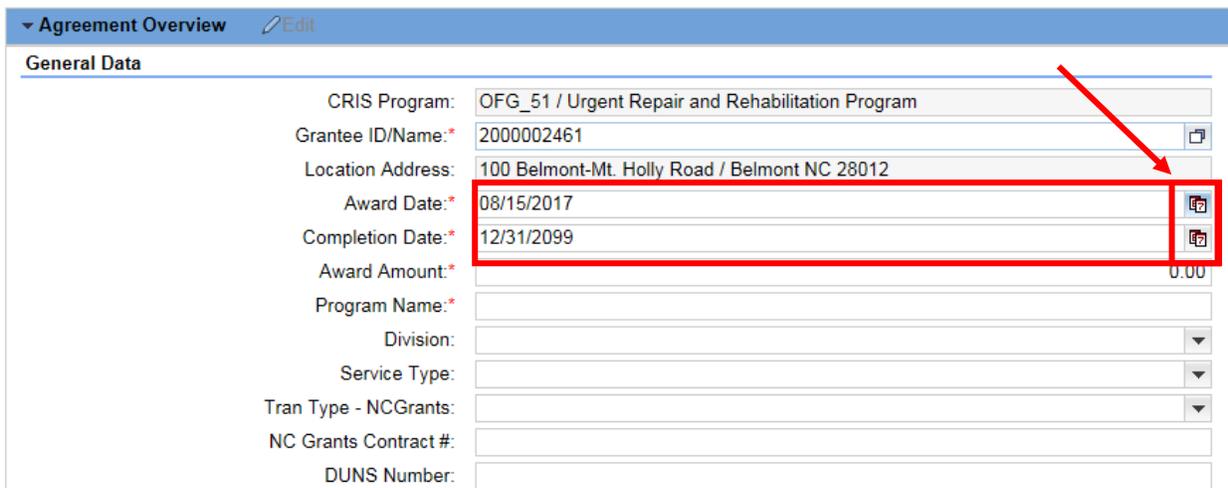
5. **Award Amount –** Fill in the award amount.

6. **Program Name** – Fill in the program name.

7. **Division** – Select the division (if applicable). If no divisions are listed, leave this section blank. **For DHHS users, you must select a division.** Since DHHS users now have access to all of DHHS' divisions, if a division is not selected when creating an award, the grant will default to the Central Admin code. This will impact the information sent over to e-procurement/NCAS, as the grant will then be under the Central Admin code (20), rather than the division code.

8. **Service Type** – Select the service type.
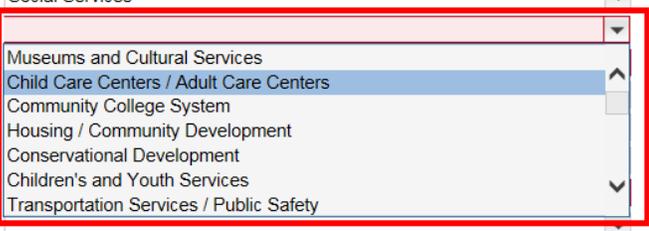
9. **Tran Type – NCGrants** – Select the transaction type.

10. **NC Grants Contract #** - Fill in the contract number.

11. **DUNS Number** – Fill in the DUNS number.

12. **Federal Project Number** – Fill in the federal project number (formerly called federal award ID in NCGrants).

13. **Funding Source** – Select the funding source.

14. **Optional Agency Text** – Fill in optional agency text if applicable.

15. **Project Information** – You will not be able to fill any of these fields out. They will be automatically populated once you create the award. NCGrants ID (formerly called Grant ID in NCGrants) will generate a 10-digit NC Grant ID for the award. For NCAS users, you should be able to follow the same process to get the 4-digit code, except you will use a 10-digit code for the Grant ID. The NC Grants Indicator will remain blank.

16. **Status** – The first three fields in this section will automatically update when any changes to an award have been made. For the field **Status**, you can switch it from "Approved" to "Completed." When first creating an award, it will default to "Approved." When the award has been completed, you may edit and switch to "Completed."

Notes: Expected Outcomes & Specific Restrictions

1. **Notes – Expected Outcomes & Specific Restrictions** – To add expected outcomes and specific restrictions, click on the text to the right of Expected Outcomes and Specific Restrictions, under Notes.

2. **Expected Outcomes** – Once you click on text, a new screen will pop up. Write out the expected outcomes under Text. Once completed, click on Back. This will save the expected outcomes.

3. **Specific Restrictions** – Follow the same steps (1-2) for Specific Restrictions. Once completed, both the expected outcomes and specific restrictions will show up on the main award page. See below for an example.
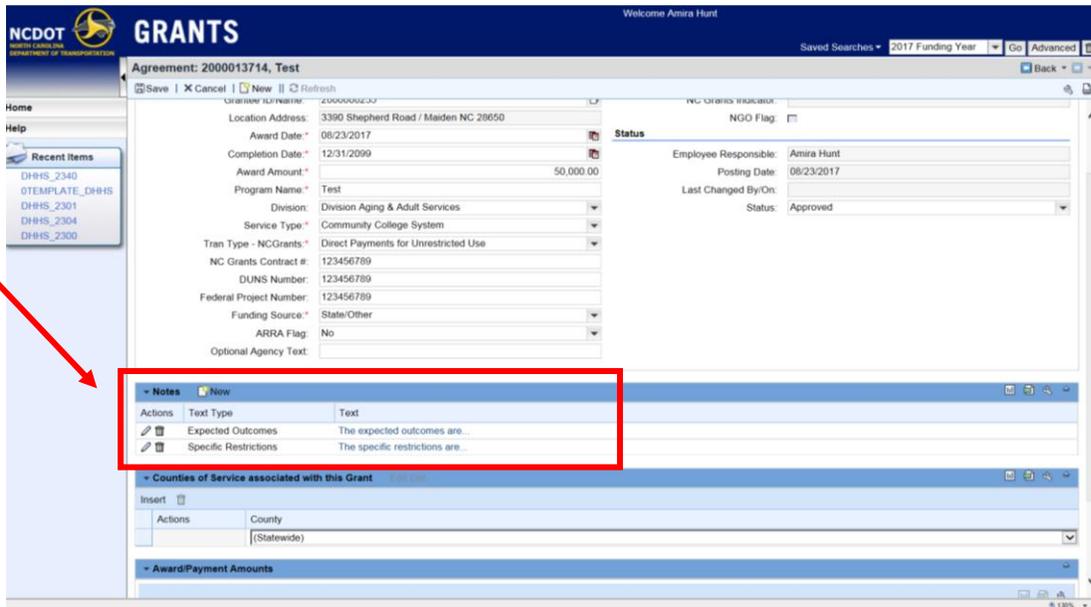
4. **Edit/Delete Expected Outcomes or Specific Restrictions** – To edit or delete expected outcomes or specific restrictions, click on the icon(s) located to the left under Actions.
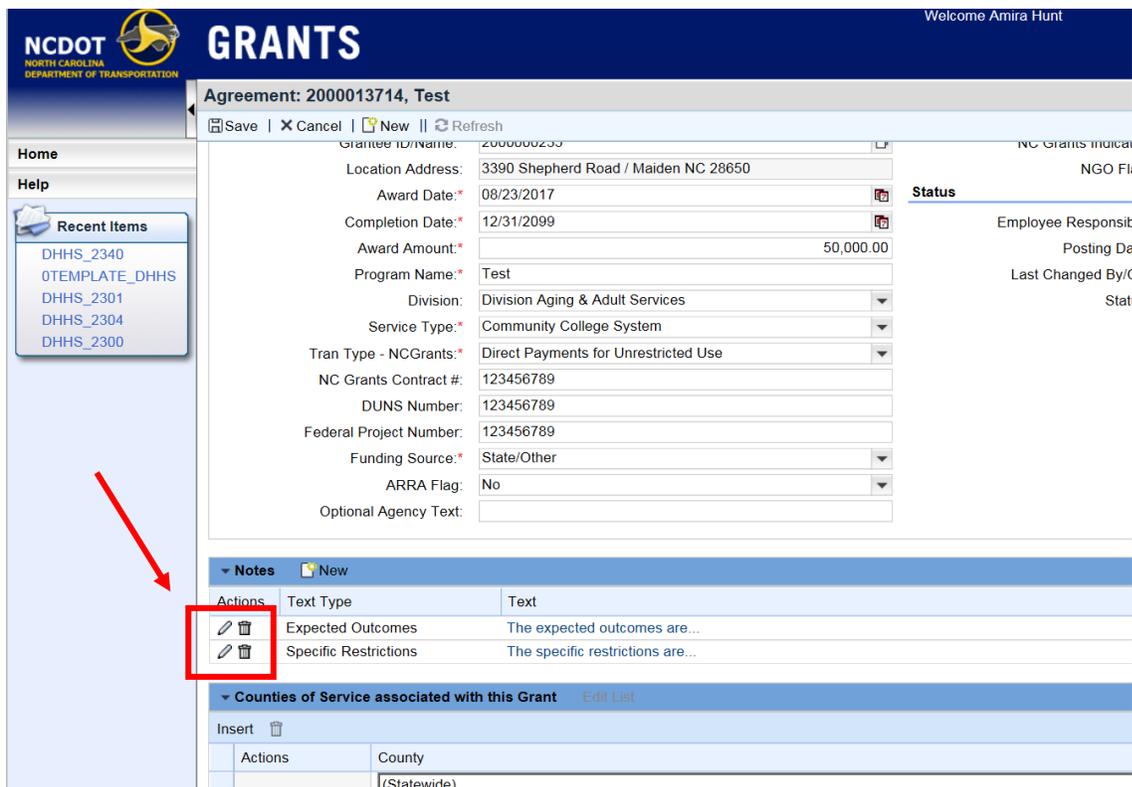
Counties of Service

1. **Counties of Service Associated with this Grant** – To add a county to the award agreement, select a county from the drop-down.
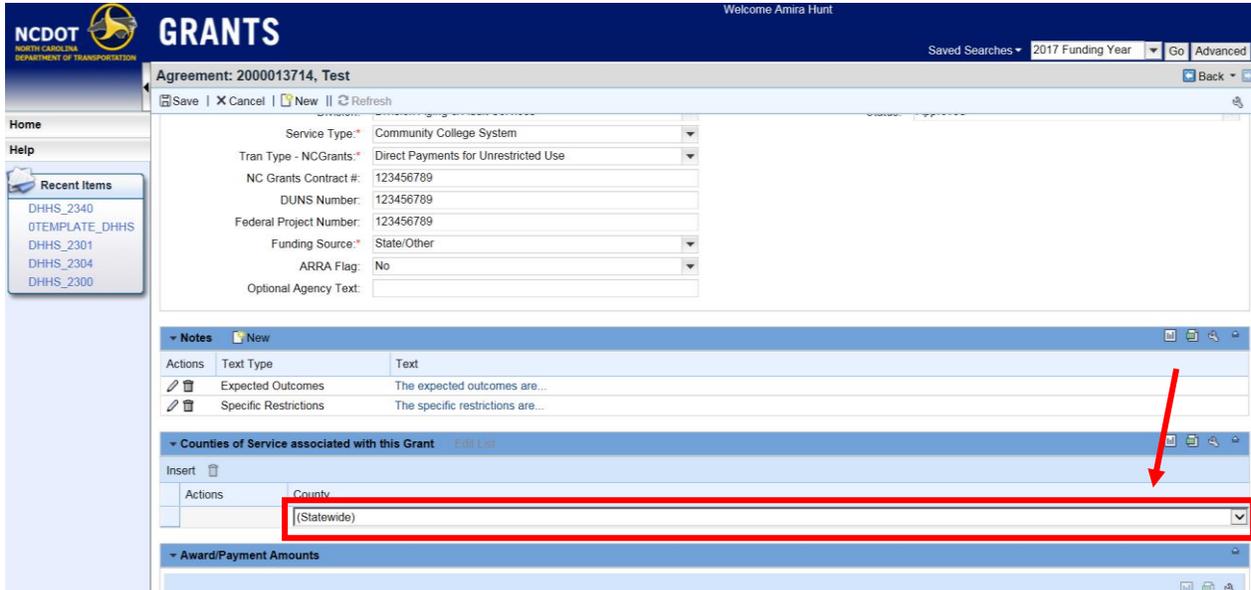
2. To add more than one county, click on "Insert," located on the left-hand side.

Note: Make sure no counties are selected when inserting additional counties. The application will not allow you to add more when one or more is currently selected.

When a county is selected, the box next to it is filled in like in the example with Avery. If the county is selected, you will not be able to insert a new county. Be sure to unselect the county before inserting a new one.

To delete a county, select the county and click on the trash icon.

Award/Payment Amounts

Once payments have been made to the grantee, the information from NCAS will be uploaded into this field. For more information on how to view and modify payments, see the Change/Display Awards section.

Transaction History

Transaction history shows all types of transactions that happen related to the award agreement, including information on the transaction type, date the transaction happened, and who created the transaction. This section is automatically generated.

Save Award

Once you have completed all the steps, you can save the award agreement by clicking on the save icon at the top. If you need to make any changes to the award, see the Change/Display Awards section.

Change/Display Awards

Display Award

1. **Change/Display Awards** – To edit or display an award, click on Change/Display Awards.
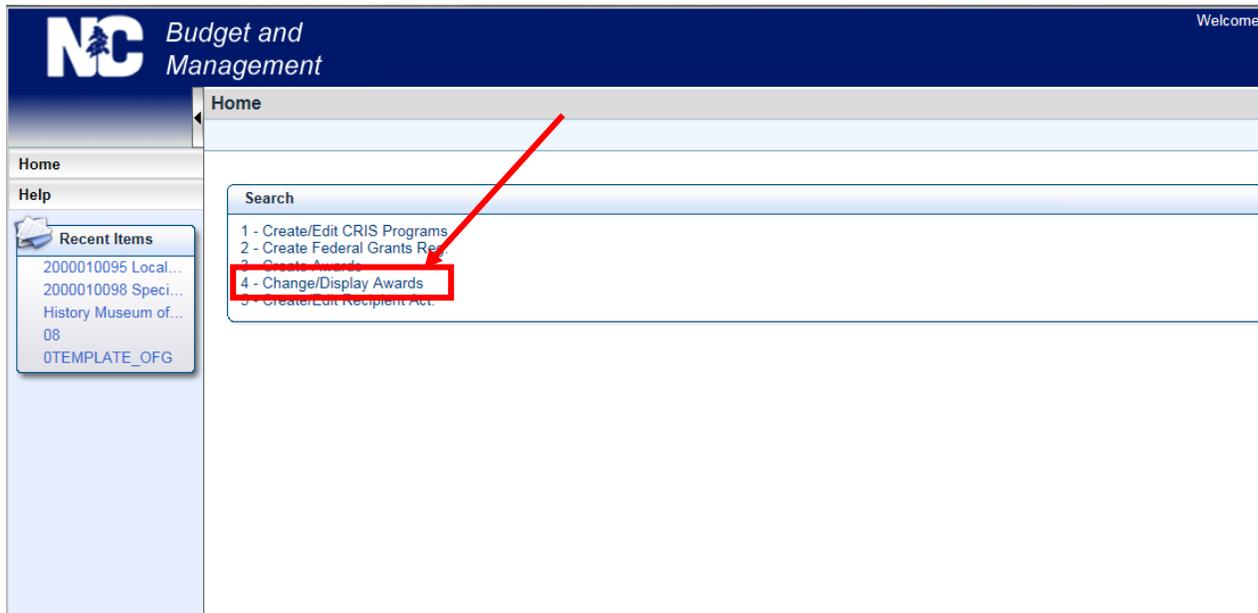
2. **Search for Award** – Once you click on Change/Display Awards, the following screen will appear. Enter your search criteria for searching for the award and click on search. For more information on how to use search functions, see the Search Function section.
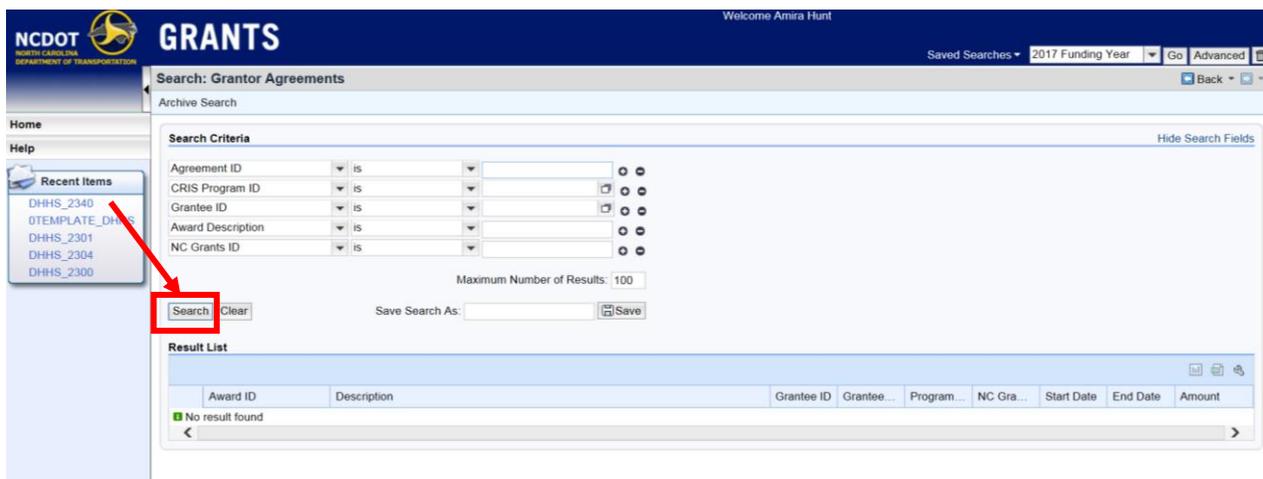
3. **Select Award** – Once you've found the award you'd like to edit or display, click on the correct Award ID.

4. **Display Award** – Once you have selected the correct award, you will be able to see all the information that was entered in the Create Award function, such as general data and award/payment information, specific to the award.

Edit Award

1. **Edit Award: Agreement Overview** – Once you have selected an award, there are edit icons for the agreement overview, notes, and counties sections. To edit the agreement overview, click on the edit icon next to the word Agreement Overview.
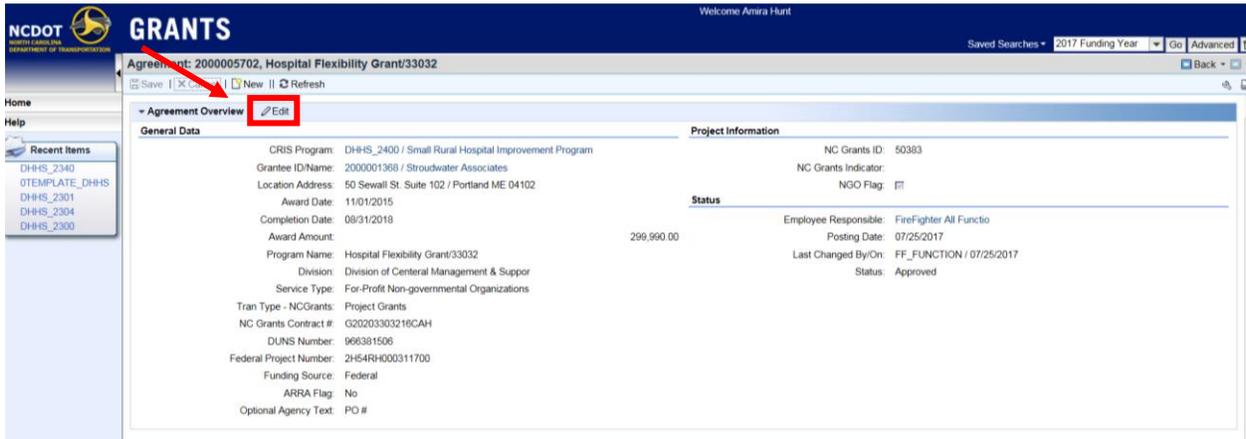
You can now edit various fields in the agreement overview section on the left-hand side. To change the status from approved to completed, click on the status drop-down and select completed on the right-hand side.

To save, click on the save icon located at the top.

2. **Edit Award: Expected Outcomes & Specific Restrictions** – To edit the expected outcomes and specific restrictions, there is an edit icon next to each under Notes. Click on the icon.

After clicking on the edit icon, a new screen will pop up with the expected outcomes/specific restrictions. Make the necessary changes and hit back to save.

3. **Edit Award: Counties of Service associated with this Grant** – To edit the counties of service, click on Edit List at the top of the section.
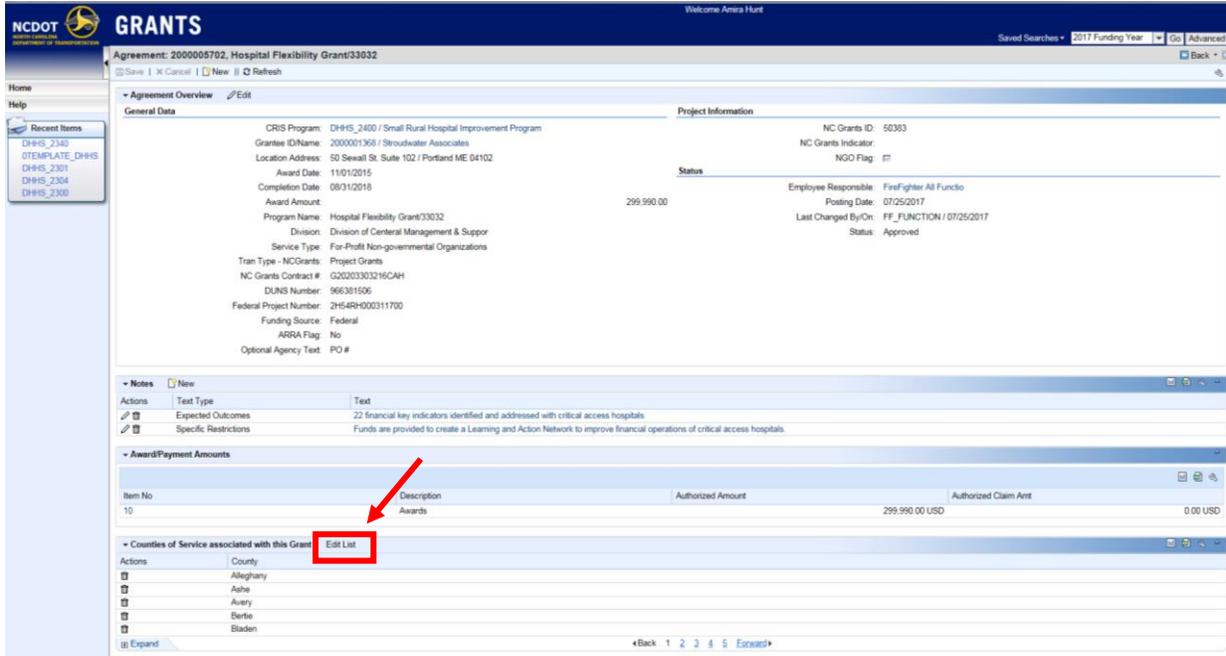
You can now change the counties selected by clicking on the drop-down. To add a county, click on insert.
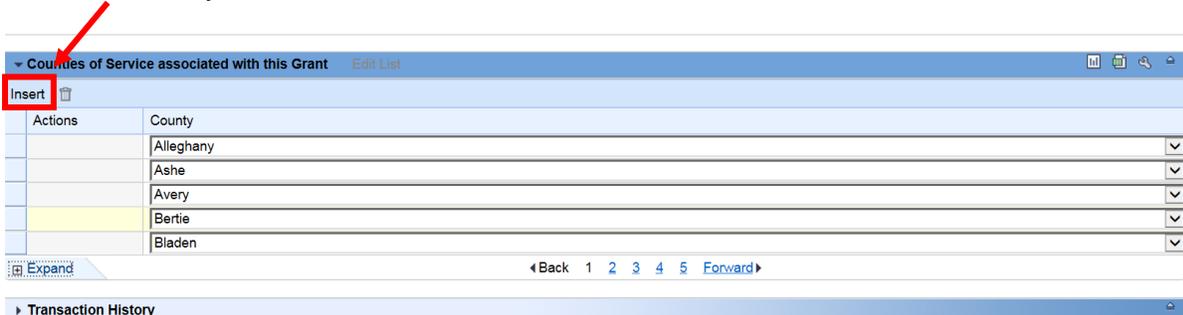
Note: Make sure no counties are selected when inserting additional counties. The application will not allow you to add more when one or more is currently selected.
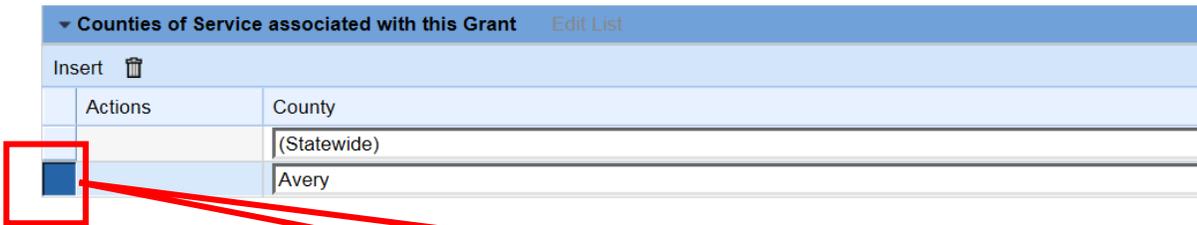

When a county is selected, the box next to it is filled in like in the example with Avery. If the county is selected, you will not be able to insert a new county. Be sure to unselect the county before inserting a new one.

To delete a county, select the county and hit the delete icon.

To save any changes, click on the save icon at the very top of the screen.
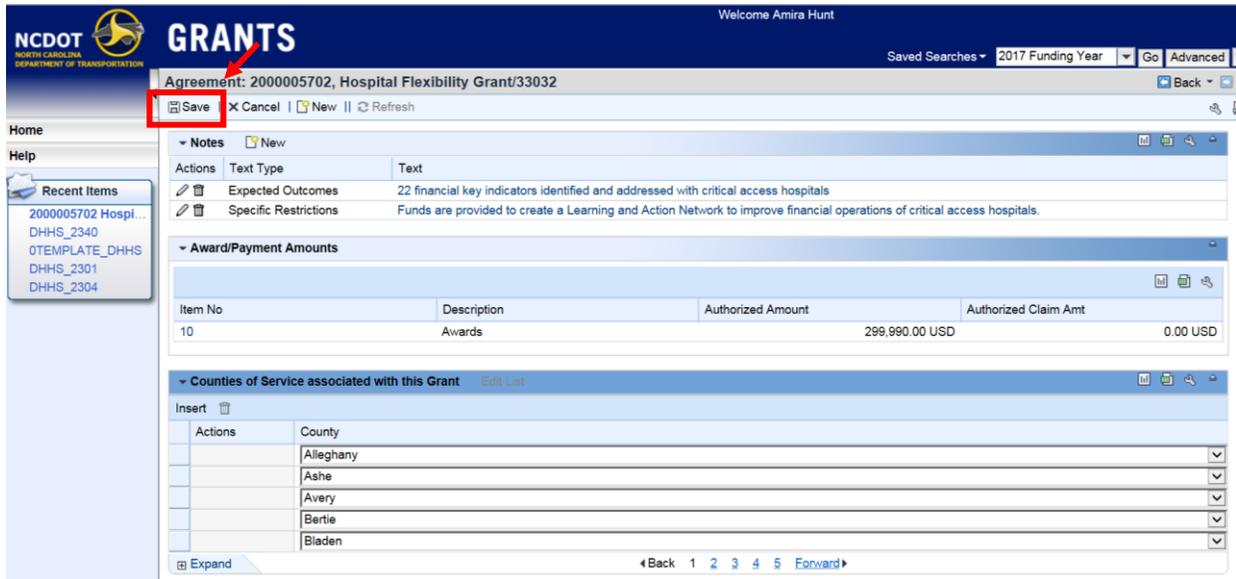
View & Edit Award/Payment Amounts

1. **Award/Payment Amounts** – All claims uploaded from NCAS will appear under Award/Payment Amounts under the Change/Display award screen within the individual award. Each claim will appear with an item number, the description, authorized amount, and the authorized claim amount. The authorized claim amount is the payment/receipt.

2. **View Claim** – To view more information on individual payments/claims, click on the item number associated with the specific claim.

Once you click on the item number, a new screen will pop up with the claim ID, description, and the authorized amount. You can get more information by clicking on the claim ID.
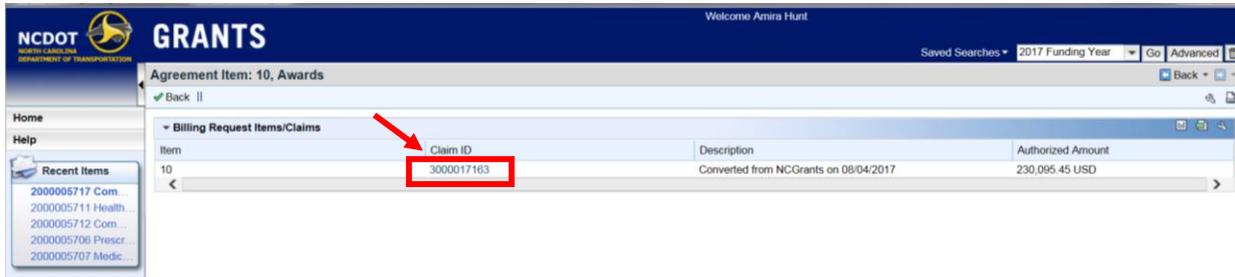
Once you click on the claim ID, you will see something like the following:
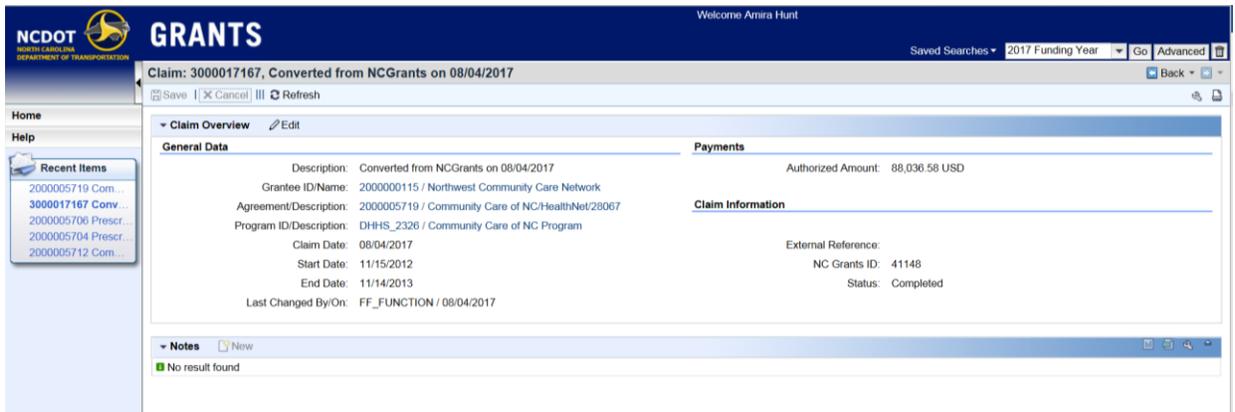
3. **Edit Payment Information** – Currently, OSBM and DOT are working adding a function to edit payment information in the system.

Create/Edit Recipient Account

Create Recipient Account

1. To create or edit a recipient' account information, click on Create/Edit Recipient Acct. on the Home Page.

2. **Create Recipient Account** – Once you click on Create/Edit Recipient Acct., a new screen will pop up. To add a new recipient, click on New Account.

    Note: Before adding a new recipient, confirm that they are not already in the system by using the search function.
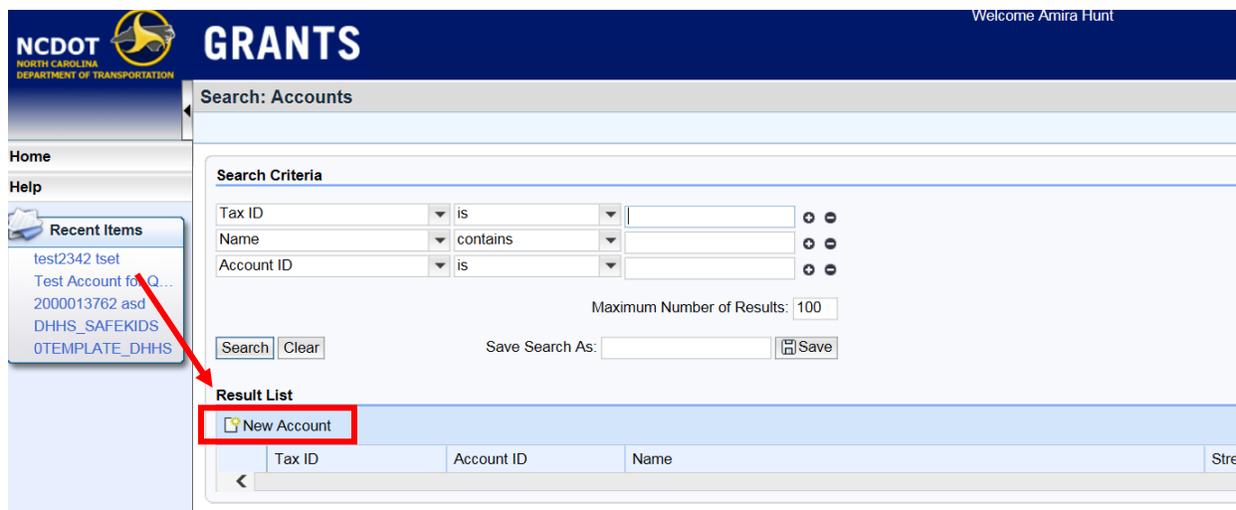
3. **Create Corporate Account** – Once you click on New Account, a new screen will pop up. Enter in the legal name of the recipient under Name 1. **Then click Enter.**

Note: If the recipient's name is more than 40 characters, enter the remainder of the recipient's name into Name 2.

Once you hit enter, a number will auto-generate for the ID field. Some of the fields will now be editable. A section for additional addresses at the bottom will also appear.

4. **General Data** – Fill in the remaining fields under general data – tax number, and fiscal month end.

   Note: You will not be able to edit Suspension Indicator or Suspension Reason.

5. **Main Address and Communication Data** – Fill in the address and communication data.

Note: When filling out the state/country, select country before state using the icon to the right (if country isn't already selected).

A new window will pop up with a list of countries. Select the correct country.

Once the country is selected, you can now select a state.

Another window will pop up with a list of states.

6. **Phone/Extension**: For phone number, first select the country using the icon to the right (if it isn't already selected).

Once the country is selected, add in the phone number with the area code.

7. **Email and Website** – Add in the email and website url.

8. **Notes** – You can add any notes under the section titled Notes.

9. **Additional Addresses** – Under Addresses, the main address and communication data will show up as the first line when you hit save. To add additional addresses, click on New.

Once you click on New, a window will pop up. Fill in the address, phone, email, website, and address type like you did above. To add additional phone numbers, emails, websites, and address types, click on insert within each section. To delete any, click on the delete icon within each section.

10. **Save additional addresses** – To save the additional addresses, click on Back.

11. **Save** – Once you have completed adding all the information of the recipient, click on Save, located at the top of the page.

Edit a Recipient Account

1. **Create/Edit Recipient Acct.** – To create or edit a recipient' account information, click on Create/Edit Recipient Acct. on the Home Page.

2. **Search/Edit a Recipient** – You can search for a recipient using the search criteria options. For more information on how to use the search function, see the Search Function section.

   Once you have found the correct recipient, click on its name to open its account information.
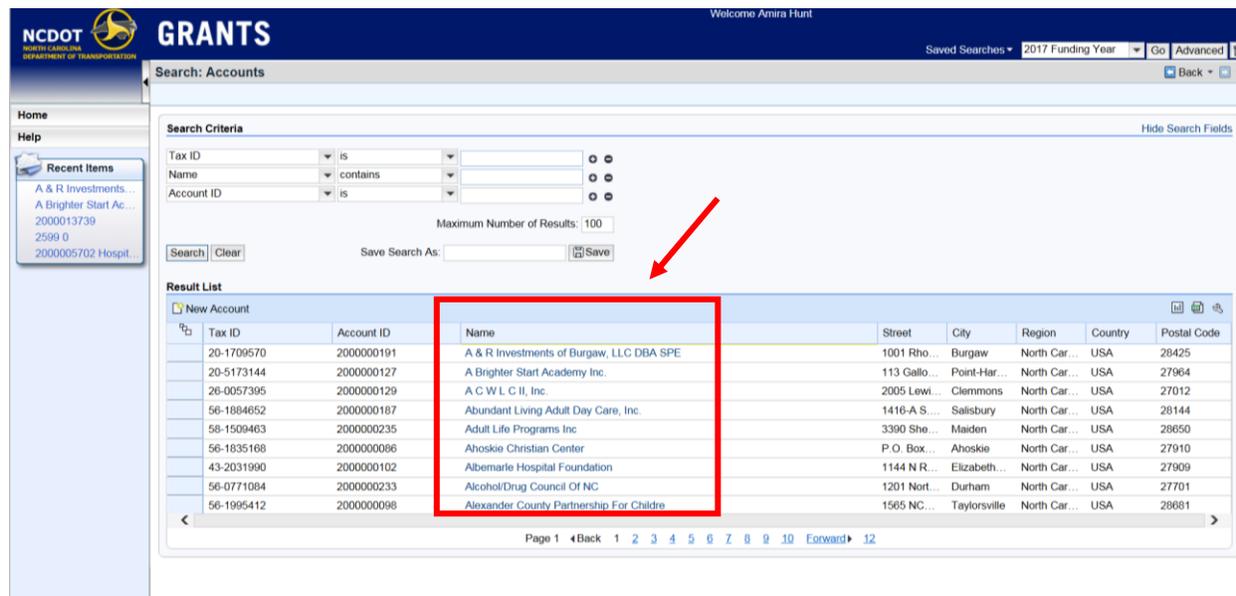
3. **Edit a Recipient: Main Address** – Once you have selected the recipient, you can now edit its address and other information. To edit its main address, click on the edit icon at the top.

You can now edit the address, phone number, email, and website. You can also edit the Notes section below. You will not be able to edit the name, tax ID, fiscal month end, or the suspension indicators. For more information on how to edit fields in this section, please see steps 5-8 in Create Recipient Account section.

Note: If a recipient changes its name or tax ID, please email NCGrants at Grants-OSBM@osbm.nc.gov with IRS tax documentation of the changes. OSBM will make the changes in the system.

4. **Edit a Recipient: Additional Addresses** – To edit additional addresses, click on the edit icon next to the address you'd like to edit.

   Note: The first address listed under Addresses is the Main Address from the section above.

   You can now edit all the fields for this address. For more information on how to edit fields in this section, please see steps 9-10 in Create Recipient Account section.

5. **Save** – To save any changes, click on the Back icon.

Click on save on the main screen.