



# Grants System Help Guide

Office of State Budget and Management (OSBM)  
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## Table of Contents

Basic Navigation .....	2
Login .....	2
Home Page & Navigation.....	3
Search Function.....	6
Customized Display Data.....	9
Add a CRIS Program.....	13
Add a Record to the Federal Grants Registry .....	26
Create Awards .....	31
Agreement Overview .....	32
Notes: Expected Outcomes & Specific Restrictions.....	41
Counties of Service.....	43
Award/Payment Amounts.....	45
Transaction History .....	46
Save Award.....	47
Change/Display Awards .....	48
Display Award .....	48
Edit Award.....	50
View & Edit Award/Payment Amounts .....	54
Create/Edit Recipient Account .....	56
Create Recipient Account .....	56
Edit a Recipient Account.....	66

# 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**.



NC Enterprise Business Services

User \*

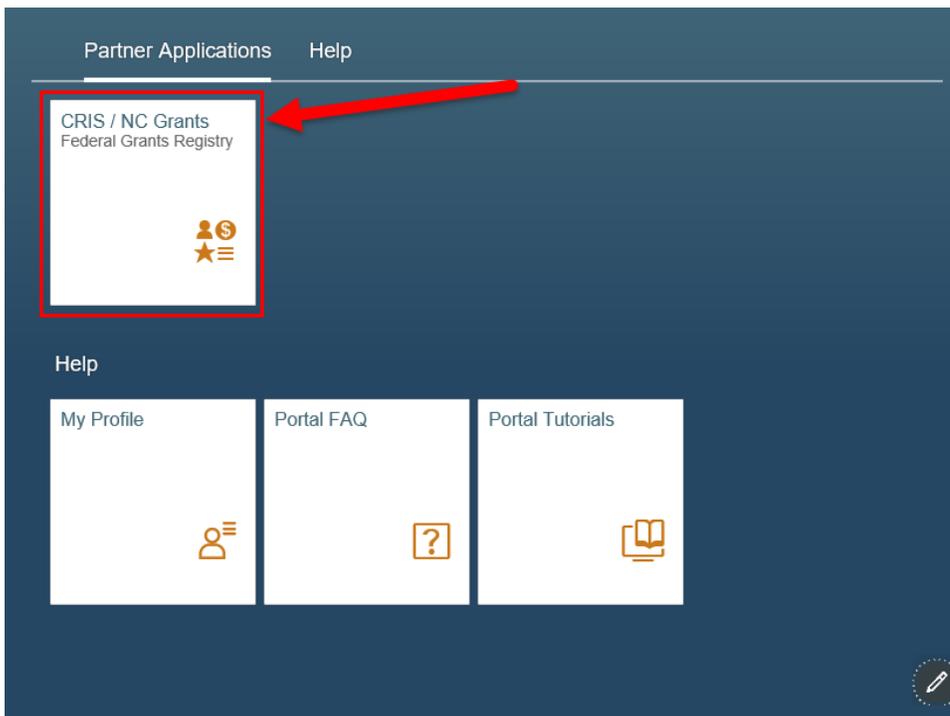
Password \*

Passwords are case sensitive

Log On

[Login Help](#) \* [Browser Support](#)

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.

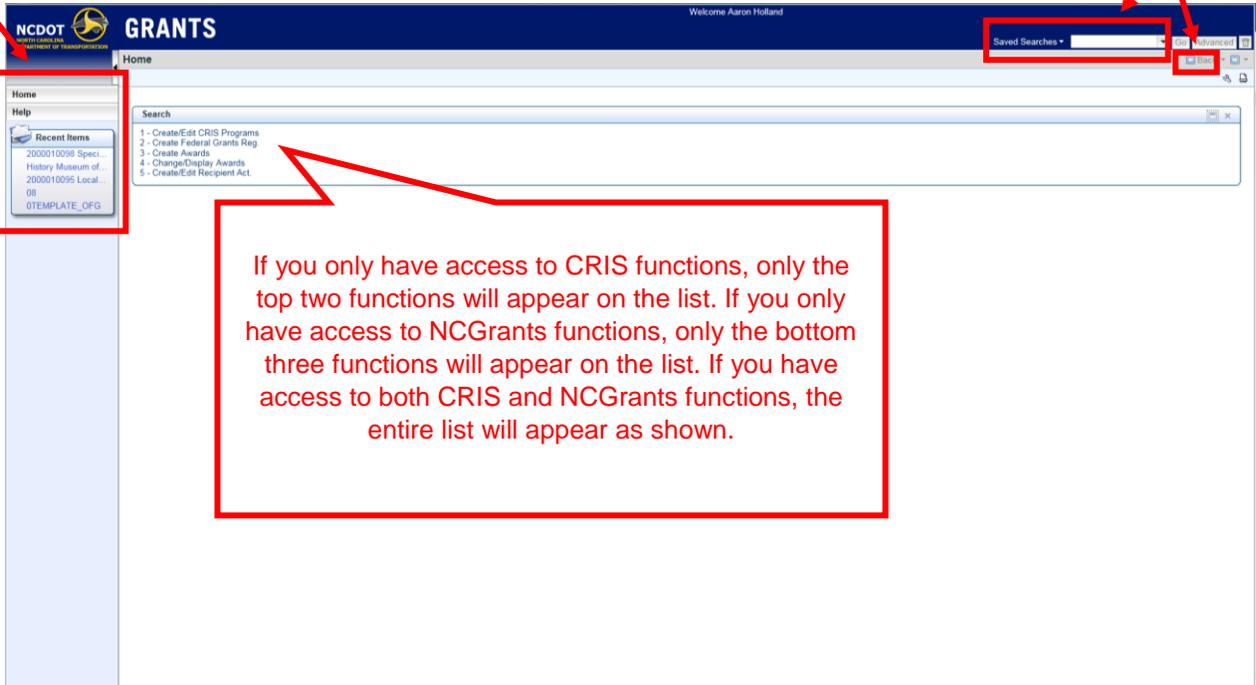
On the left-hand side of the screen, there is a list of quick links for “Home,” “Help,” and “Recent Items.” This display remains viewable throughout the use of the application. Each of the links does the following:

- 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.

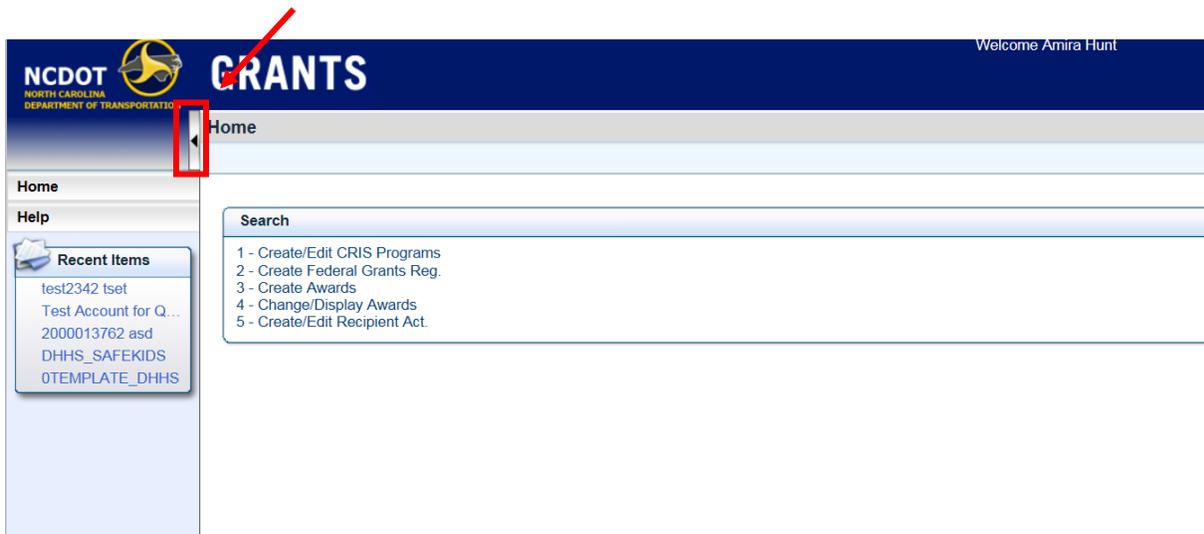
When using the application, you can click on “Back” to go back anytime.



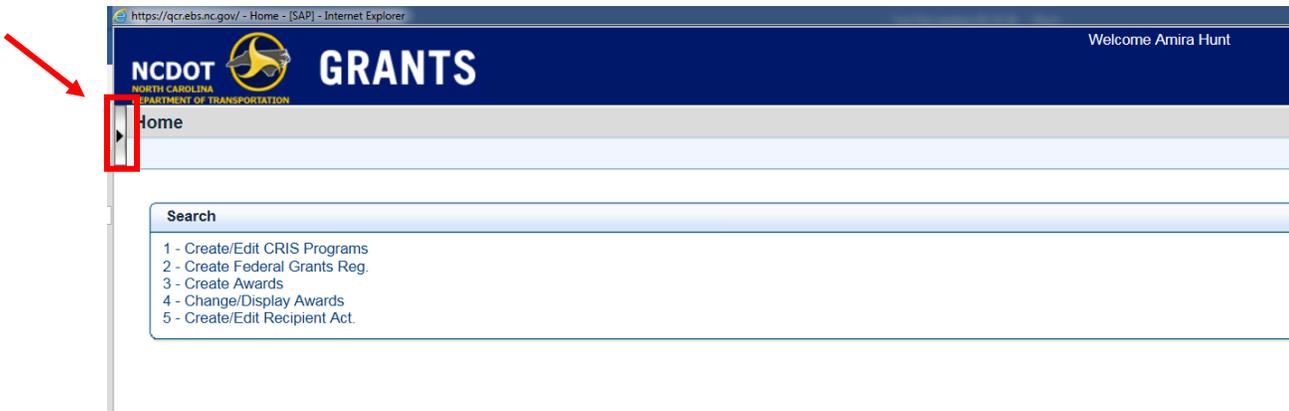
The screenshot shows the NCDOT GRANTS application interface. The top navigation bar includes the NCDOT logo, the word "GRANTS", and a user greeting "Welcome Aaron Holland". On the left, a sidebar contains links for "Home", "Help", and "Recent Items". The "Recent Items" list includes "2000010095 Spec", "History Museum of", "2000010095 Local", "08", and "0TEMPLATE\_OFG". The main content area features a "Search" section with a list of five functions: "1 - Create/Edit CRIS Programs", "2 - Create Federal Grants Reg", "3 - Create Awards", "4 - Change/Display Awards", and "5 - Create/Edit Recipient Act". A "Saved Searches" dropdown menu is visible in the top right corner. Red arrows and a text box highlight these elements.

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.

▼ Notes New

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

▼ 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](#)

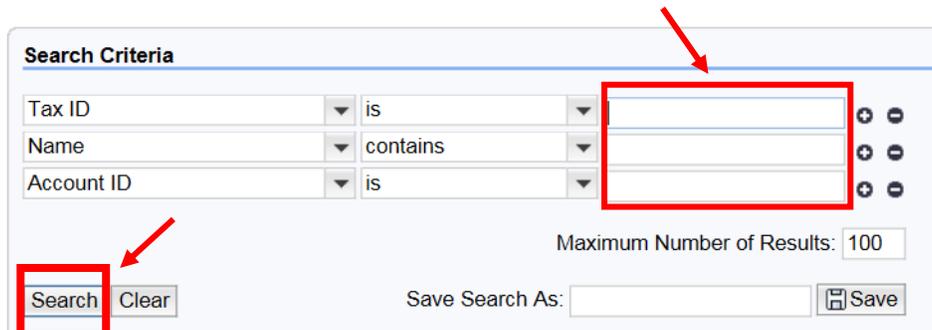
Actions	County
	Catawba
	Ashe
	Avery
	Bertie
	Bladen

Expand

◀ Back 1 2 3 4 5 Forward ▶

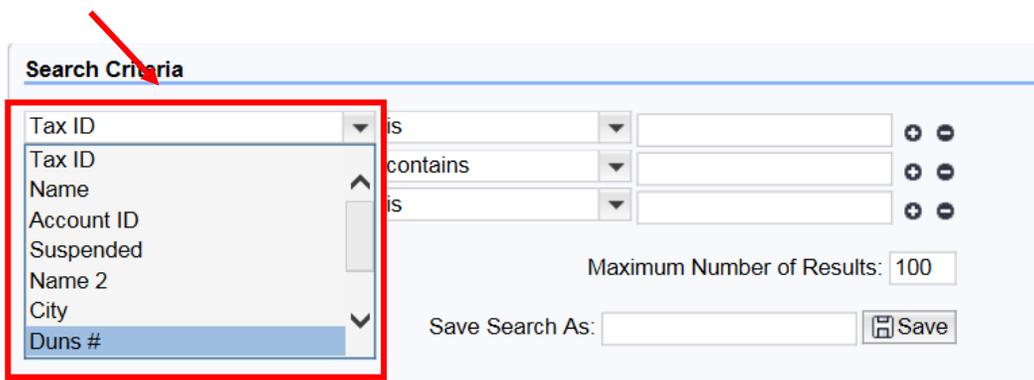
## Search Function

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.



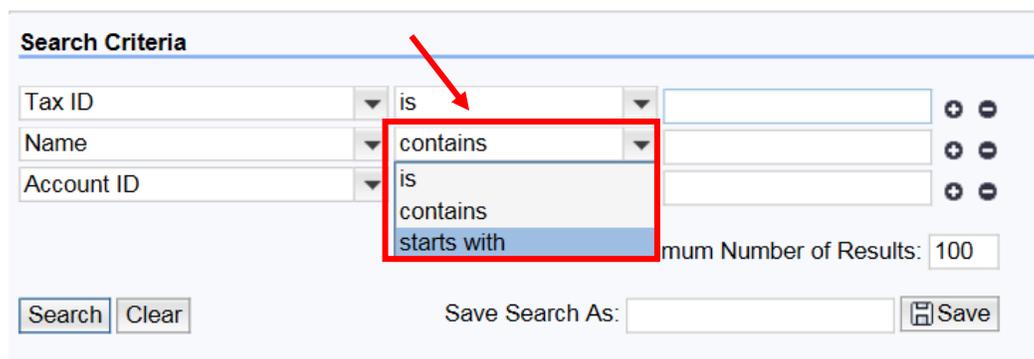
The screenshot shows the 'Search Criteria' form. It has three rows of search criteria: 'Tax ID' with filter 'is', 'Name' with filter 'contains', and 'Account ID' with filter 'is'. Each row has a text input field for the search term. A red box highlights the search input fields. Below the criteria, there is a 'Search' button (highlighted with a red box), a 'Clear' button, a 'Maximum Number of Results' field set to '100', and a 'Save Search As:' field with a 'Save' 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).



The screenshot shows the 'Search Criteria' form with the 'Tax ID' dropdown menu open. The menu lists several options: 'Tax ID', 'Name', 'Account ID', 'Suspended', 'Name 2', 'City', and 'Duns #'. A red box highlights the dropdown menu. The rest of the form, including the search input fields, filters, and buttons, is visible in the background.

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.



The screenshot shows the 'Search Criteria' form with the filter dropdown menu open for the 'Name' row. The menu lists three options: 'is', 'contains', and 'starts with'. A red box highlights the dropdown menu. The rest of the form, including the search input fields, filters, and buttons, is visible in the background.

When searching a grantee using its Tax ID, make sure to include the hyphen (i.e. xx-xxxxxxx).

**Search Criteria**

Tax ID	is	20-1709570	+	-
Name	contains		+	-
Account ID	is		+	-

Maximum Number of Results: 100

Search Clear Save Search As: Save

**Result List**

New Account

Tax ID	Account ID	Name	S
20-1709570	2000000191	A & R Investments of Burgaw, LLC DBA SPE	1

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.

**Search Criteria**

Agreement ID	is		+	-
CRIS Program ID	is		+	-
Grantee ID	is		+	-
NC Grants ID	is		+	-

Maximum Number of Results: 100

Search Clear Save Search As: Save

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

**Search Criteria**

Agreement ID	is		+	-
CRIS Program ID	is		+	-
Grantee ID	is		+	-
NC Grants ID	is		+	-
NC Grants ID	is		+	-

Maximum Number of Results: 100

Search Clear Save Search As: Save

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

**Search Criteria**

Agreement ID	is		+	-
CRIS Program ID	is		+	-
Grantee ID	is		+	-
NC Grants ID	is		+	-

Maximum Number of Results: 100

Search Clear Save Search As: Save

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.

**Search Criteria**

Agreement ID	is		+	-
CRIS Program ID	is		+	-
Grantee ID	is		+	-
NC Grants ID	is		+	-

Maximum Number of Results: 100

Search Clear Save Search As: DHHS\_2400 x Save

**Result List**

Award ID	Description	Gra...	Gra...	Program ID
2000005702	Hospital Flexibility Grant/33032	200...	A &...	DHHS_2400
2000005906	Critical Access Hospital/34578	200...	Pun...	DHHS_2400
2000005928	Hospital Flexibility Grant/#28327	200...	Joh...	DHHS_2400
2000005929	Rural Hospital Flexibility Grant/	200...	High...	DHHS_2400

It now shows up in the “Saved Searches” field.

Welcome Amira Hunt

**NCDOT NORTH CAROLINA DEPARTMENT OF TRANSPORTATION GRANTS**

Search: Grantor Agreements

Archive Search

Search 'DHHS\_2400' has been saved

**Saved Searches** DHHS\_2400

- 2017 Funding Year
- 2377
- 2377
- 2378
- DHHS\_2400

**Search Criteria**

Agreement ID	is		+	-
CRIS Program ID	is	DHHS_2400	+	-
Grantee ID	is		+	-
NC Grants ID	is		+	-

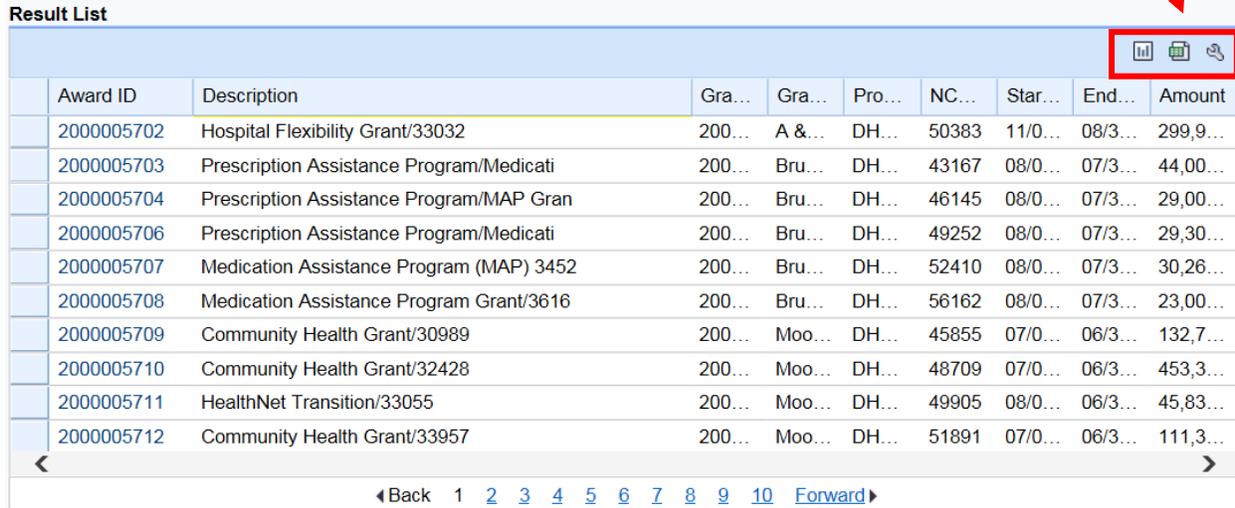
Maximum Number of Results: 100

## 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.

The screenshot shows a dialog box titled "Personalization -- Webpage Dialog". It contains a text area at the top explaining column selection and width settings. Below this is a section titled "Table Navigation" which is highlighted with a red box. This section includes three radio buttons: "Scrolling", "Paging", and "Both" (which is selected). Below the radio buttons are two input fields: "Number of Visible Rows Before Scrolling:" and "Number of Rows Before Paging:". Below the "Table Navigation" section are two columns: "Available Columns" and "Displayed Columns". The "Available Columns" list includes Name, Changed By, Changed On, FA Project Number, Created On, Created By, Posting Date, and User Status. The "Displayed Columns" list includes Name, Award ID, Description, Grantee ID, Grantee Name, Program ID, NC Grants ID, Start Date, End Date, and Amount. Below these columns is a "Sorting Definition" section with a "Sort By:" dropdown menu and two radio buttons: "Ascending" (selected) and "Descending". At the bottom of the dialog are three buttons: "Save", "Reset to Default", and "Cancel".

You can choose which columns should be displayed in the table. In addition, you can determine the order in which the columns are displayed. You can also define the relative (percentage) or absolute (pixel) width of each column compared to the available screen area. If you enter a number without a unit of measurement, the width is automatically determined in pixels. If you want to define the relative width, add '%' after the number. Fixed columns need an absolute (pixel) width value to be rendered correctly.

**Table Navigation**

Table Navigation:  Scrolling  Paging  Both

Number of Visible Rows Before Scrolling:

Number of Rows Before Paging:

**Available Columns**

Name
Changed By
Changed On
FA Project Number
Created On
Created By
Posting Date
User Status

**Displayed Columns**

Name	Width	Fix...	Filt...
Award ID		<input type="checkbox"/>	
Description			
Grantee ID			
Grantee Name			
Program ID			
NC Grants ID			
Start Date			
End Date			
Amount		<input type="checkbox"/>	

**Sorting Definition**

Sort By:   Ascending  Descending

Save Reset to Default Cancel

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.

The dialog box is titled "Personalization -- Webpage Dialog" and contains the following sections:

- Table Navigation:** Includes radio buttons for "Scrolling", "Paging", and "Both" (selected). Below are input fields for "Number of Visible Rows Before Scrolling:" and "Number of Rows Before Paging:".
- Available Columns:** A list of column names including Name, Changed By, Changed On, FA Project Number, Created On, Created By, Posting Date, and User Status.
- Displayed Columns:** A table with columns: Name, Width, Fix..., and Filt... The rows include Name, Award ID, Description, Grantee ID, Grantee Name, Program ID, NC Grants ID, Start Date, End Date, and Amount. At the top of this section are "Up" and "Down" buttons.
- Sorting Definition:** Includes a "Sort By:" dropdown menu and radio buttons for "Ascending" (selected) and "Descending".

Buttons at the bottom include "Save", "Reset to Default", and "Cancel".

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.

Personalization -- Webpage Dialog

You can choose which columns should be displayed in the table. In addition, you can determine the order in which the columns are displayed. You can also define the relative (percentage) or absolute (pixel) width of each column compared to the available screen area. If you enter a number without a unit of measurement, the width is automatically determined in pixels. If you want to define the relative width, add '%' after the number. Fixed columns need an absolute (pixel) width value to be rendered correctly.

**Table Navigation**

Table Navigation:  Scrolling  Paging  Both

Number of Visible Rows Before Scrolling:

Number of Rows Before Paging:

**Available Columns**

<input type="checkbox"/>	Name
<input type="checkbox"/>	Changed By
<input type="checkbox"/>	Changed On
<input type="checkbox"/>	FA Project Number
<input type="checkbox"/>	Created On
<input type="checkbox"/>	Created By
<input type="checkbox"/>	Posting Date
<input type="checkbox"/>	User Status

**Displayed Columns**

Up	Down			
<input type="checkbox"/>	<input type="checkbox"/>	Name	Width	Fi... Fil...
<input type="checkbox"/>	<input type="checkbox"/>	Award ID		<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Description		
<input type="checkbox"/>	<input type="checkbox"/>	Grantee ID		
<input type="checkbox"/>	<input type="checkbox"/>	Grantee Name		
<input type="checkbox"/>	<input type="checkbox"/>	Program ID		
<input type="checkbox"/>	<input type="checkbox"/>	NC Grants ID		
<input type="checkbox"/>	<input type="checkbox"/>	Start Date		
<input type="checkbox"/>	<input type="checkbox"/>	End Date		
<input type="checkbox"/>	<input type="checkbox"/>	Amount		<input type="checkbox"/>

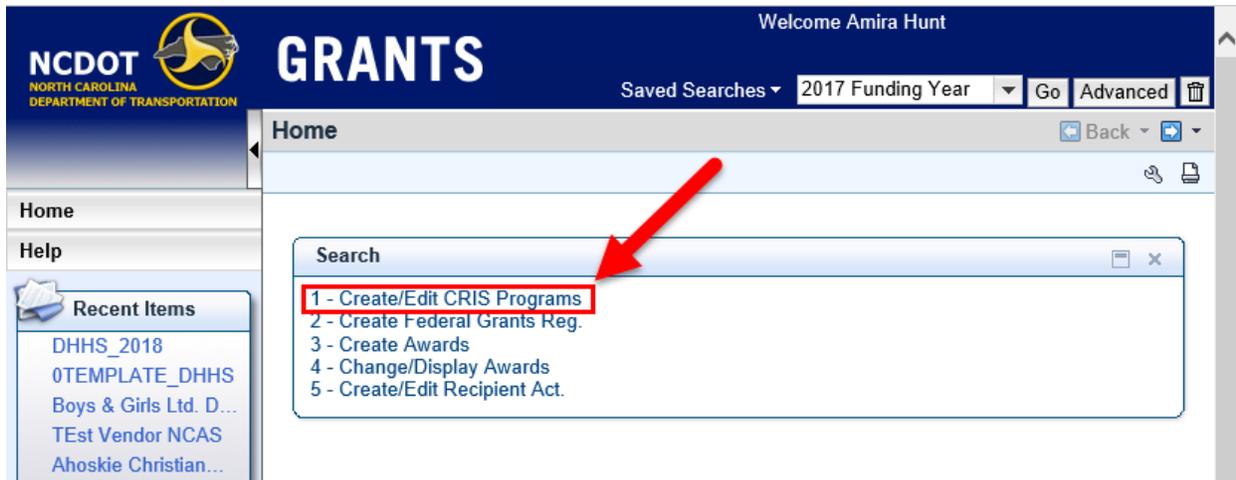
**Sorting Definition**

Sort By:   Ascending  Descending

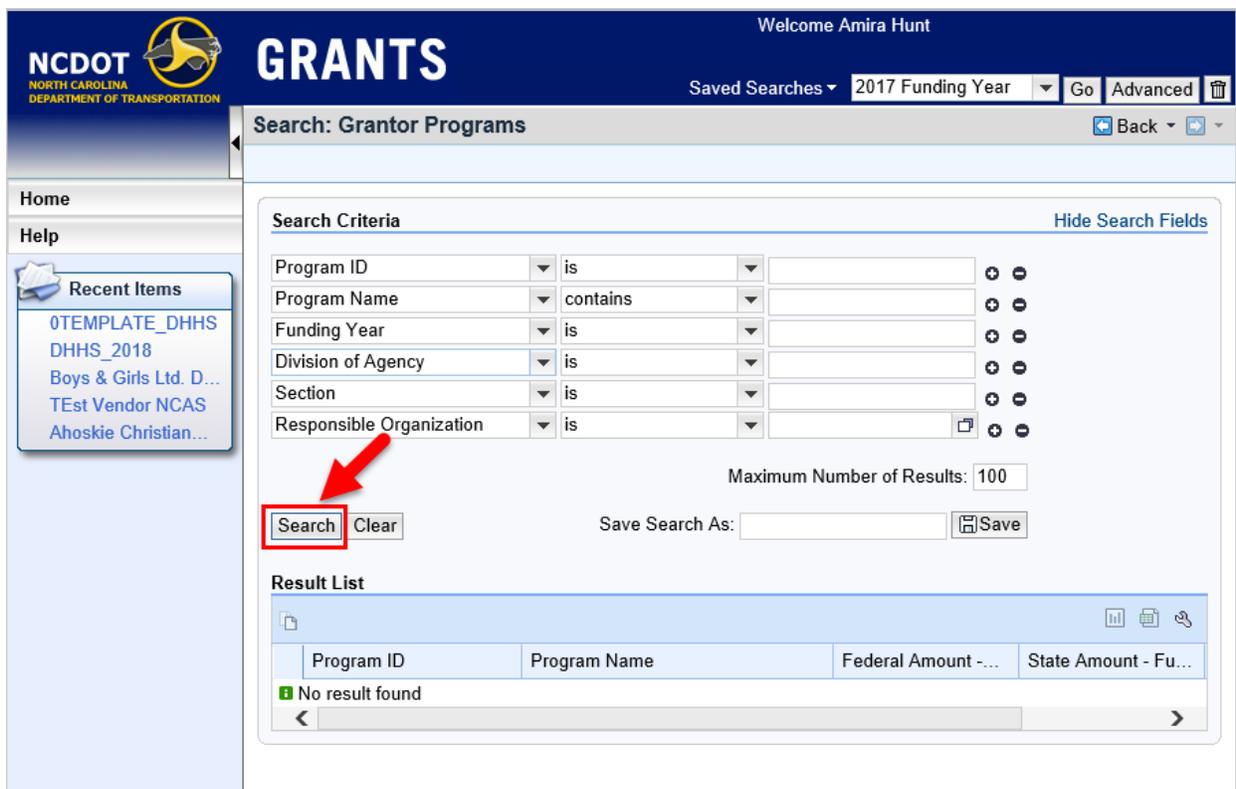
Save Reset to Default Cancel

# 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.



- 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.

Search: Grantor Programs

Search Criteria

Program ID is  
 Program Name contains  
 Funding Year is  
 Section is

Maximum Number of Results: 100

Search Clear Save Search As: Save

Result List

Program ID	Program Name	Fundin...	Federal Amount
<b>0TEMPLATE_DHHS</b>	DHHS_NewProgram	2019	70,000
DHHS_2018	DHHS_NewProgram	SFY18	75,000
DHHS_2300	Telecommunications Access Pro...	2008	

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

Grantor Program: 0TEMPLATE\_DHHS

Save Cancel **Copy icon** Refresh

Program Details Edit

Program ID: 0TEMPLATE\_DHHS Status: Released

Program Name:

CRIS Data

Department / Agency: 2000000007 / DHHS Division of Health &... Division of Agency:  
 Section: Federal Amount - Fun:  
 URL Path: State Amount - Funds:  
 Funding Year: Other Amount - Funds:

- 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.

The screenshot shows the NCDOT GRANTS interface. The main header includes the NCDOT logo and the word 'GRANTS'. A navigation bar at the top right shows 'Welcome Amira Hunt', 'Saved Searches', '2017 Funding Year', and 'Go Advanced'. The page title is 'Grantor Program: New'. Below the title is a toolbar with 'Save', 'Cancel', and 'Refresh' buttons. A yellow box highlights a message area containing the following alerts:

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

The form is divided into sections: 'Program Details' and 'CRIS Data'. In the 'Program Details' section, there are input fields for 'Program ID' and 'Program Name', and a dropdown menu for 'Status' set to 'Released'. The 'CRIS Data' section contains several input fields: 'Department / Agency' (2000000007 / DHHS Division of Health), 'Division of Agency', 'Section', 'URL Path', 'Funding Year', 'Federal Amount - Fun', 'State Amount - Funds', and 'Other Amount - Funds'.

- Program ID** – The new CRIS application requires you to enter a unique Program ID that is no longer than 24-characters (*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.

This screenshot shows the same NCDOT GRANTS interface as the previous one, but with the 'Program ID' field in the 'Program Details' section filled with the text 'DHHS\_RuralHousing'. A red arrow points to this field. The error messages from the previous screenshot are still visible in the yellow message box at the top.

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

GRANTS

Welcome Amira Hunt

2017 Funding Year

Grantor Program: New

Save | Cancel | Refresh

5 Messages

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

Program ID: \* DHHS\_RuralHousing

Program Name: \* Rural Housing in North Carolina

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

GRANTS

Welcome

Grantor Program: New

Save | Cancel | Refresh

5 Messages

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

Program ID: \* DHHS\_RuralHousing

Program Name: \* Rural Housing in North Carolina

Department / Agency: 2000000007 / DHHS Division of Health & Human Services

Section:

URL Path:

Funding Year: \*

Status for Programs: Active

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

The screenshot shows the NCDOT GRANTS interface. The header includes the NCDOT logo and the word 'GRANTS'. The page title is 'Grantor Program: New'. A navigation menu on the left includes 'Home', 'Help', and 'Recent Items'. The main content area has a toolbar with 'Save', 'Cancel', and 'Refresh' buttons. A yellow warning box contains the following messages:

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

The 'Program Details' section shows:

- Program ID: DHHS\_RuralHousing
- Program Name: Rural Housing in North Carolina

The 'CRIS Data' section is expanded, showing:

- Department / Agency: 2000000007 / DHHS Division of Health & Human Services
- Section: (empty field, highlighted with a red box and a red arrow)
- URL Path: (empty field)
- Funding Year: (empty field)
- Status for Programs: Active

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

The screenshot shows the NCDOT GRANTS interface. The header includes the NCDOT logo and the word 'GRANTS'. The page title is 'Grantor Program: New'. A navigation menu on the left includes 'Home', 'Help', and 'Recent Items'. The main content area has a toolbar with 'Save', 'Cancel', and 'Refresh' buttons. A yellow warning box contains the following messages:

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

The 'Program Details' section shows:

- Program ID: DHHS\_RuralHousing
- Program Name: Rural Housing in North Carolina

The 'CRIS Data' section is expanded, showing:

- Department / Agency: 2000000007 / DHHS Division of Health & Human Services
- Section: (empty field)
- URL Path: https://www.ncdhhs.gov/about/grant- (highlighted with a red box and a red arrow)
- Funding Year: (empty field)
- Status for Programs: Active
- Division of Agency: (dropdown menu)
- Federal Amount - Fun: 0.00
- State Amount - Funds: 0.00
- Other Amount - Funds: 0.00

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

The screenshot shows the NCDOT GRANTS system interface. The top navigation bar includes the NCDOT logo, the word 'GRANTS', and a user greeting 'Welcome Amira Hunt'. Below this, there are search filters for 'Saved Searches' and '2017 Funding Year'. The main content area is titled 'Grantor Program: New' and contains several sections:

- Messages:** A yellow banner with 5 messages, including 'Make an entry in field 'Funding Year'', 'Make an entry in field 'Program Name'', 'Make an entry in field 'Program ID'', 'Number missing', and 'Address of partner 2000000007 (Responsible Organization) does not have an address type'.
- Program Details:** Fields for 'Program ID:\*' (DHHS\_RuralHousing) and 'Program Name:\*' (Rural Housing in North Carolina).
- CRIS Data:** A table with fields for 'Department / A...' (2000000007 / DHHS Division of Health and Human Services), 'Section:', 'URL Path:' (https://www.ncdhhs.gov/about/), 'Funding Year:\*' (2017-18), and 'Status for Prog...' (Active). The 'Funding Year' field is highlighted with a red box and a red arrow.

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

- Active** (default) – These are active grant programs and will appear on the public facing CRIS site.
- 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.
- Inactive** – These are programs that are inactive but may still have open awards. These programs will not appear on the public facing CRIS site.

This screenshot shows a close-up of the 'Status for Programs' dropdown menu. The menu is open, showing three options: 'Active', 'Marked for Deletion', and 'Inactive'. The 'Marked for Deletion' option is highlighted with a red box and a red arrow. The background shows the same form as the previous screenshot, with the 'Funding Year' field still highlighted.

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

Grantor Program: New Back

Save | Cancel | Refresh

5 Messages

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

Program Details Edit

Program ID:

Program Name:

CRIS Data

Department / Agency:  Division of Agency:

Section:

URL Path:

Funding Year:

Status for Programs:

Federal Amount - Fun:

State Amount - Funds:

Other Amount - Funds:

Commission for Health Services  
Division Aging & Adult Services  
Division of Central Management & Support  
Child Development & Early Edu  
Health Service Regulation  
Medical Assistance

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

NCDOT NORTH CAROLINA DEPARTMENT OF TRANSPORTATION **GRANTS** Welcome Amira Hunt

Saved Searches | 2017 Funding Year | Go | Advanced

Grantor Program: New Back

Save | Cancel | Refresh

5 Messages

- Make an entry in field 'Funding Year'
- Make an entry in field 'Program Name'
- Make an entry in field 'Program ID'
- Number missing
- Address of partner 2000000007 (Responsible Organization) does not have an address type

Program Details Edit

Program ID:

Program Name:

CRIS Data

Department / Agency:  Division of Agency:

Section:

URL Path:

Funding Year:

Status for Programs:

Federal Amount - Fun:

State Amount - Funds:

Other Amount - Funds:

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.

▼ Program Details [Edit](#)

Program ID:\*   
Program Name:\*

▼ CRIS Data

Department / Agency:   
Section:   
URL Path:   
Funding Year:\*   
Status for Programs:

Division of Agency:   
Federal Amount - Fun:   
State Amount - Funds:   
Other Amount - Funds:

▼ Type of Assistance [Edit List](#)

**Insert**

Type of Assist ID

No result found

▼ Type of Assistance [Edit List](#)

**Insert**

Type of Assist ID

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.

The screenshot shows the 'Grantor Program: New' form in the NCDOT GRANTS system. The 'Type of Assistance' section is highlighted with a red box, showing a table with the following data:

Type of Assist ID	
project grants	
formula grants	

17. **Notes** – The notes section contains the grant program description and information on grantee eligibility.

- Description** – Click **Enter Description here** to enter information about the grant program.

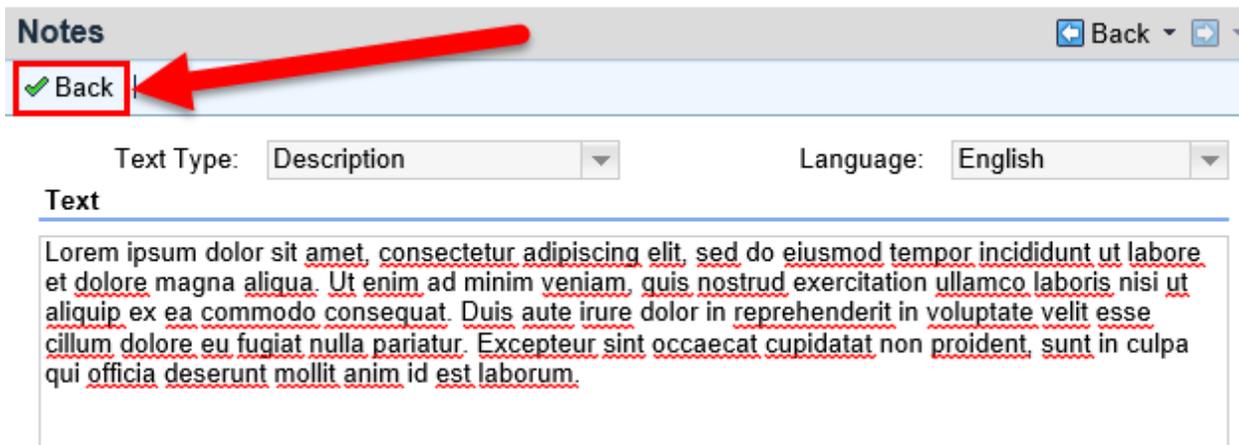
The screenshot shows the 'Notes' section in the NCDOT GRANTS system. A red arrow points to the 'Enter Description here' link in the 'Description' row of the table below:

Acti...	Text Type	Text
	Description	<a href="#">Enter Description here</a>
	Grantee Eligibility	<a href="#">Enter Description here</a>

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

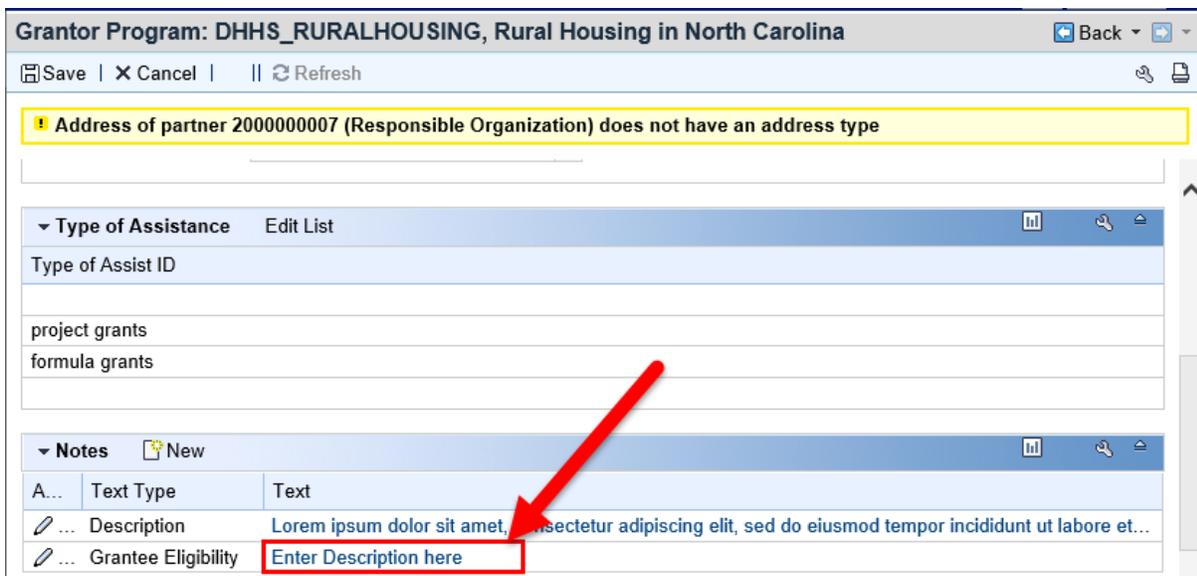
The screenshot shows the 'Notes' window in the NCDOT GRANTS system. The 'Text Type' is set to 'Description' and the 'Language' is set to 'English'. The text entry field contains the placeholder text 'Enter Description here'.

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



The screenshot shows a web application window titled "Notes". At the top left, there is a "Back" button with a green checkmark icon, highlighted by a red box and a red arrow pointing to it. Below the button, there are two dropdown menus: "Text Type:" set to "Description" and "Language:" set to "English". Underneath these is a text area with the placeholder text: "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum."

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

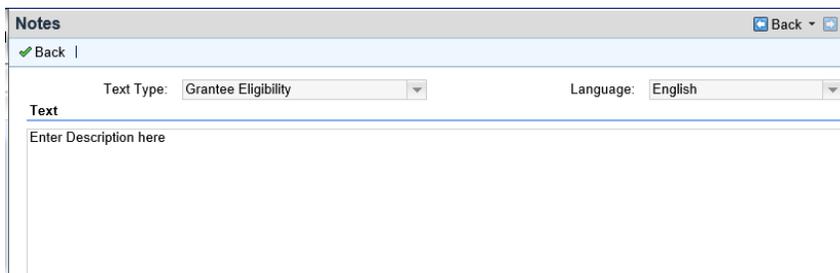


The screenshot shows a web application window titled "Grantor Program: DHHS\_RURALHOUSING, Rural Housing in North Carolina". At the top, there are buttons for "Save", "Cancel", and "Refresh". Below these is a yellow warning message: "Address of partner 2000000007 (Responsible Organization) does not have an address type". The main content area is divided into two sections: "Type of Assistance" and "Notes". The "Notes" section contains a table with the following data:

A...	Text Type	Text
...	Description	Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et...
...	Grantee Eligibility	<a href="#">Enter Description here</a>

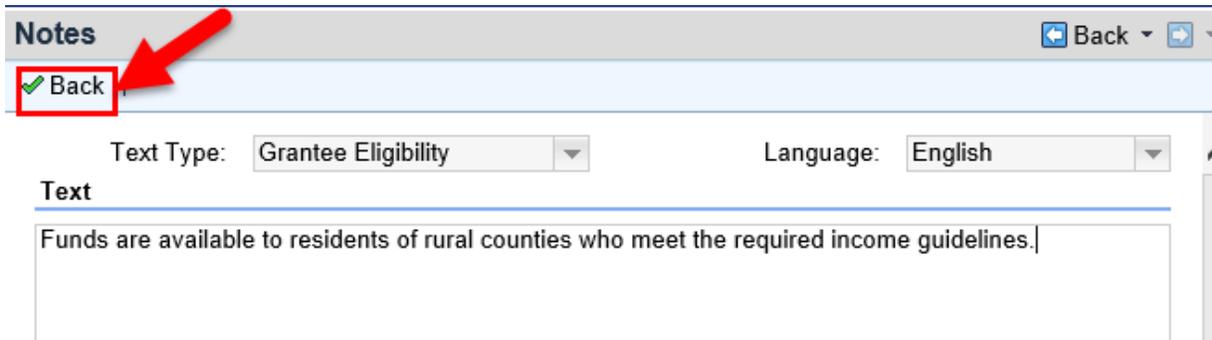
A red arrow points to the "Enter Description here" link in the "Grantee Eligibility" row.

A window will open that allows you to enter your description. You may enter text directly or copy and paste from Word or Notepad.



The screenshot shows a web application window titled "Notes". At the top left, there is a "Back" button with a green checkmark icon. Below the button, there are two dropdown menus: "Text Type:" set to "Grantee Eligibility" and "Language:" set to "English". Underneath these is a text area with the placeholder text: "Enter Description here".

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



**Notes** Back

**Back**

Text Type:  Language:

**Text**

Funds are available to residents of rural counties who meet the required income guidelines.

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**.



CFDA - For Federal Funds Only Edit List

**Insert**

CFDA Number	Program Title
No result found	

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

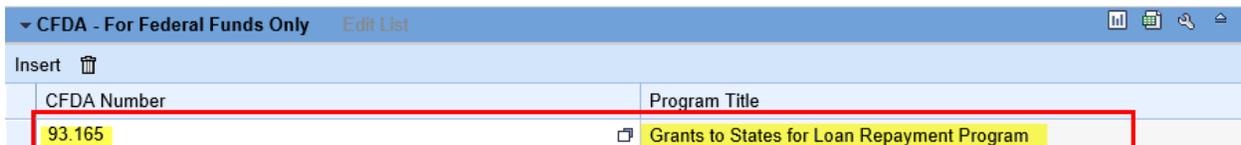


CFDA - For Federal Funds Only Edit List

**Insert**

CFDA Number	Program Title
<input type="text"/>	

20. The CFDA Number along with its Program Title will appear in the CFDA list as shown below.



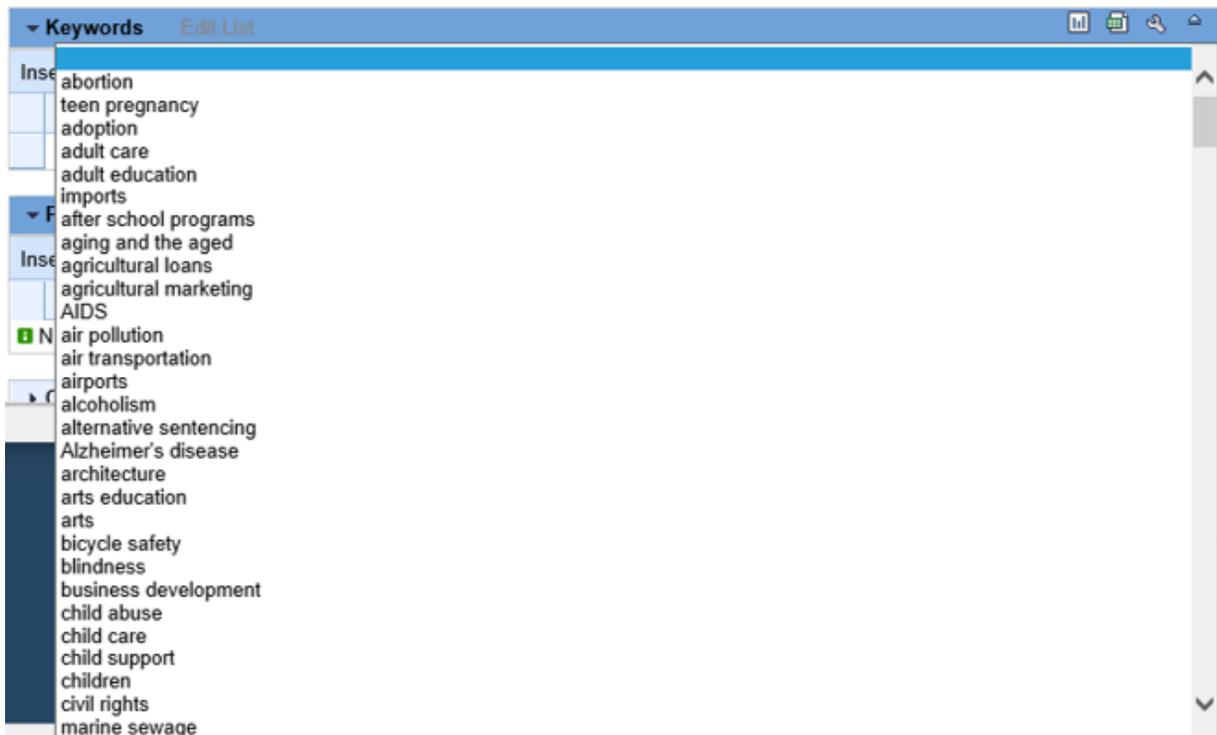
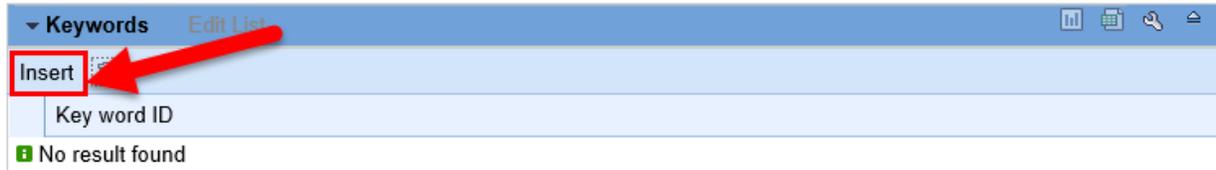
CFDA - For Federal Funds Only Edit List

**Insert**

CFDA Number	Program Title
93.165	Grants to States for Loan Repayment Program

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.

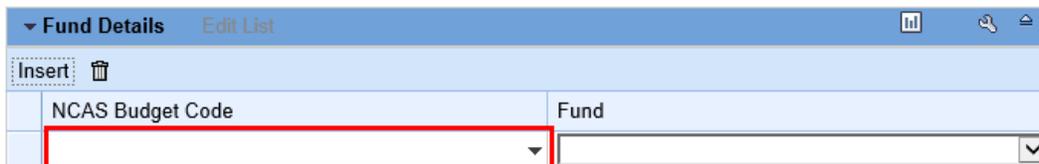


Key word ID
housing
adult care

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



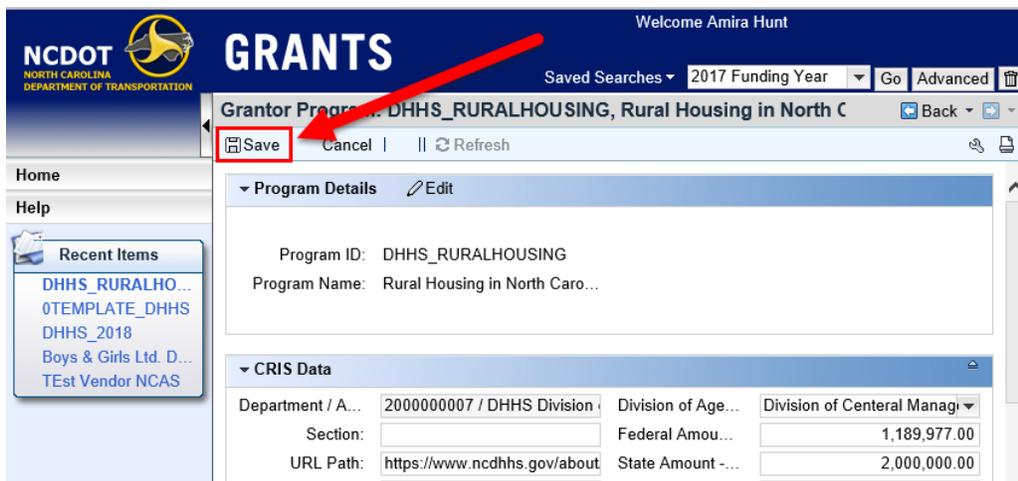
Then click to open the drop-down list of budget codes for your organization. Select the appropriate budget code.



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



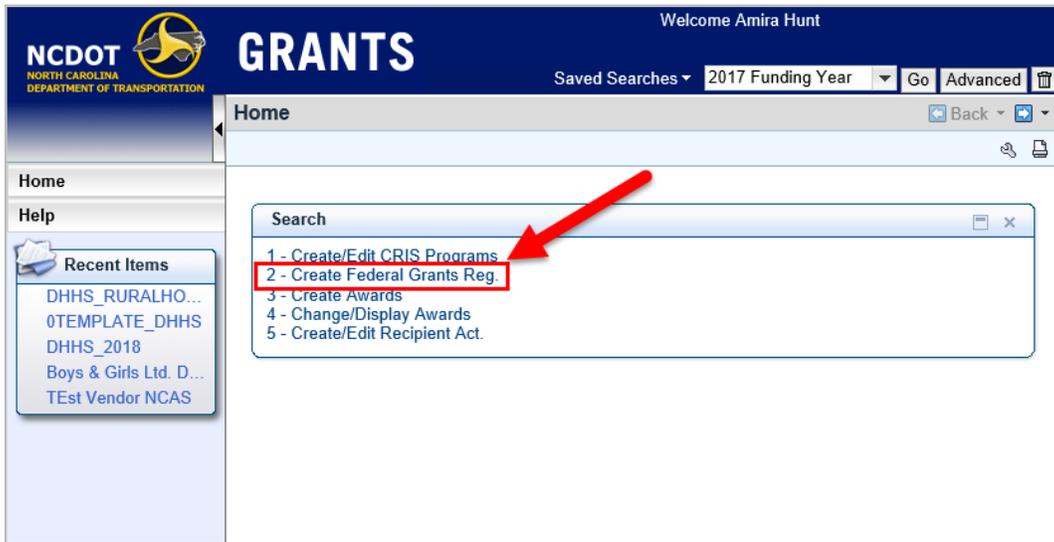
24. Once you are done, click **Save** to save your record.



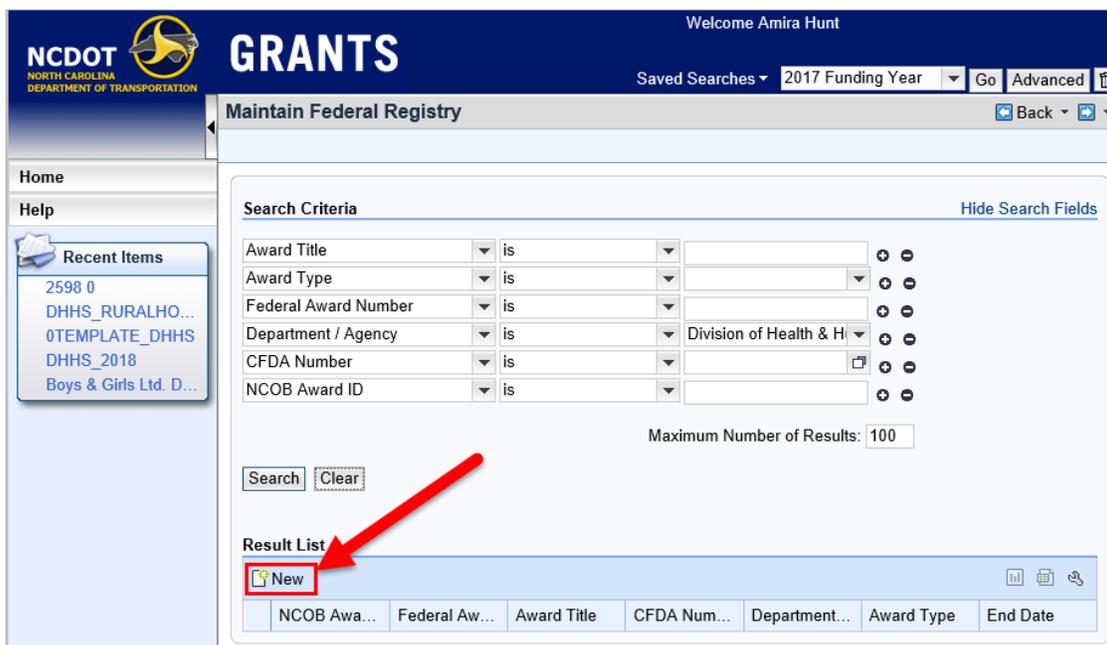
# Add a Record to the Federal Grants Registry

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.

The screenshot shows the NCDOT GRANTS interface. The header includes the NCDOT logo and the text 'GRANTS'. A navigation bar contains 'Saved Searches', '2017 Funding Year', 'Go', and 'Advanced'. The main content area is titled 'Maintain Federal Registry: 2599' and includes a 'Back' button. Below this is a toolbar with 'Save', 'Cancel', and 'New' options. The form is titled 'Federal Registry table for OSBM Grants' and contains several fields: 'NCOB Award ID' (2599), 'Award Title', 'Department / Ag...' (Division of Health & Human S), 'End Date', 'Company', 'Federal Award...', 'CFDA Number', 'Award Type', 'Fund', and 'Arra Flag' (0). The 'NCOB Award ID' field is highlighted with a red box.

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

This screenshot is similar to the previous one, showing the 'Maintain Federal Registry: 2599' form. In this view, the 'Federal Award...' field is highlighted with a red box and contains the value 'U50DP000799'. The 'NCOB Award ID' field now contains '2599'. The 'Recent Items' list on the left side of the interface includes '0TEMPLATE\_DHHS', 'DHHS\_2340', 'DHHS\_2301', 'DHHS\_2304', and 'DHHS\_2300'.

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

The screenshot shows the NCDOT GRANTS interface. The main header includes the NCDOT logo and the word 'GRANTS'. Below the header, there's a navigation bar with 'Saved Searches', '2017 Funding Year', and 'Go' and 'Advanced' buttons. The main content area is titled 'Maintain Federal Registry: 2599' and contains a form for 'Federal Registry table for OSBM Grants'. The form fields are: NCOB Award ID: 2599, Federal Award Number: U50DP000799, Award Title: National Asthma Awareness Program (highlighted with a red box), Department / Agency: Division of Health & Human Services, End Date: (empty), Company: (empty), CFDA Number: (empty), Award Type: (empty), Fund: (empty), and Arra Flag: 0. A sidebar on the left shows 'Recent Items' including '0TEMPLATE\_DHHS', 'DHHS\_2340', 'DHHS\_2301', 'DHHS\_2304', and 'DHHS\_2300'.

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

The screenshot shows the NCDOT GRANTS interface. The main header includes the NCDOT logo and the word 'GRANTS'. Below the header, there's a navigation bar with 'Saved Searches', '2017 Funding Year', and 'Go' and 'Advanced' buttons. The main content area is titled 'Maintain Federal Registry: 2599' and contains a form for 'Federal Registry table for OSBM Grants'. The form fields are: NCOB Award ID: 2599, Federal Award Number: U50DP000799, Award Title: National Asthma Awareness Program, Department / Agency: Division of Health & Human Services, End Date: (empty), Company: (empty), CFDA Number: 93.165 (highlighted with a red box), Award Type: (empty), Fund: (empty), and Arra Flag: 0. A sidebar on the left shows 'Recent Items' including '3000017163 Conve...', '2000005717 Com...', '2000005702 Hospit...', 'Alexander County...', and 'Alexander County...'.

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

The screenshot shows the NCDOT GRANTS interface. The main header includes the NCDOT logo and the word 'GRANTS'. Below the header, there's a navigation bar with 'Saved Searches', '2017 Funding Year', and 'Go' and 'Advanced' buttons. The main content area is titled 'Maintain Federal Registry: 2599' and contains a form for 'Federal Registry table for OSBM Grants'. The form fields are: NCOB Award ID: 2599, Federal Award Number: U50DP000799, Award Title: National Asthma Awareness Program, Department / Agency: Division of Health & Human Services (highlighted with a red box), End Date: (empty), Company: (empty), CFDA Number: 93.165, Award Type: (empty), Fund: (empty), and Arra Flag: 0. A sidebar on the left shows 'Recent Items' including '3000017163 Conve...', '2000005717 Com...', '2000005702 Hospit...', 'Alexander County...', and 'Alexander County...'.

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

NCDOT NORTH CAROLINA DEPARTMENT OF TRANSPORTATION  
**GRANTS**  
 Welcome Amira Hunt  
 Saved Searches 2017 Funding Year Go Advanced

**Maintain Federal Registry: 2599** Back

Save Cancel New

Federal Registry table for OSBM Grants Edit

NCOB Award ID:	2599	Federal Award N...:	U50DP000799
Award Title:	National Asthma Awareness Progr	CFDA Number:	93.165
Department / Age...:	Division of Health & Human Sei	<b>Award Type:</b>	Block Grant Co-operative Agreement Formula Grant Project Grant
End Date:		Fund:	
Company:		Arra Flag:	

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.

NCDOT NORTH CAROLINA DEPARTMENT OF TRANSPORTATION  
**GRANTS**  
 Welcome Amira Hunt  
 Saved Searches 2017 Funding Year Go Advanced

**Maintain Federal Registry: 2599** Back

Save Cancel New

Federal Registry table for OSBM Grants Edit

NCOB Award ID:	2599	Federal Award N...:	U50DP000799
Award Title:	National Asthma Awareness Progr	CFDA Number:	93.165
Department / Age...:	Division of Health & Human Sei	Award Type:	Block Grant
End Date:		Fund:	
Company:		Arra Flag:	0

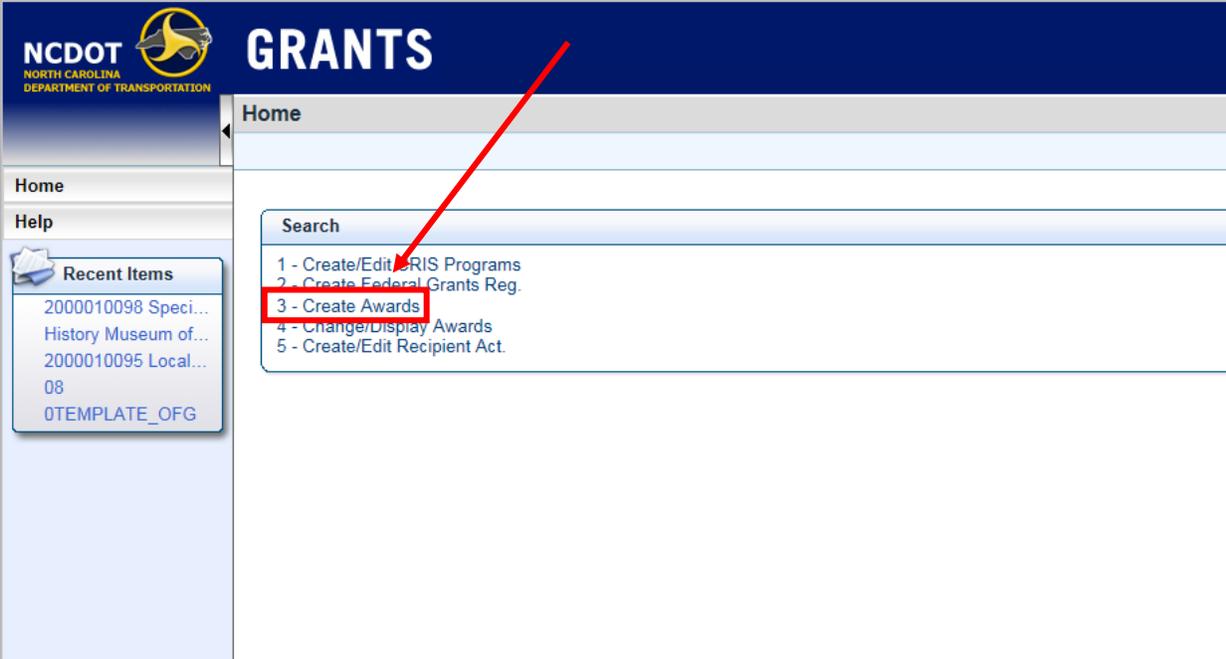
10. Click **Save** to finish.

The screenshot shows the NCDOT GRANTS system interface. The top navigation bar includes the NCDOT logo, the word "GRANTS" in large letters, and a "Welcome Amira Hunt" message. On the right side of the navigation bar, there are links for "Saved Searches", a dropdown for "2017 Funding Year", a "Go" button, and an "Advanced" link with a trash icon. Below the navigation bar, the main content area is titled "Maintain Federal Registry: 2599". A red arrow points to the "Save" button in the top left of this section. To the right of "Save" are "Cancel", "New", and "Back" buttons. Below the navigation bar, there is a sidebar with "Home" and "Help" sections. The "Recent Items" section lists several items with IDs and titles, such as "3000017163 Conve...", "2000005717 Com...", "2000005702 Hospit...", "Alexander County...", and "Alexander County...". The main content area contains a form titled "Federal Registry table for OSBM Grants" with an "Edit" link. The form fields are as follows:

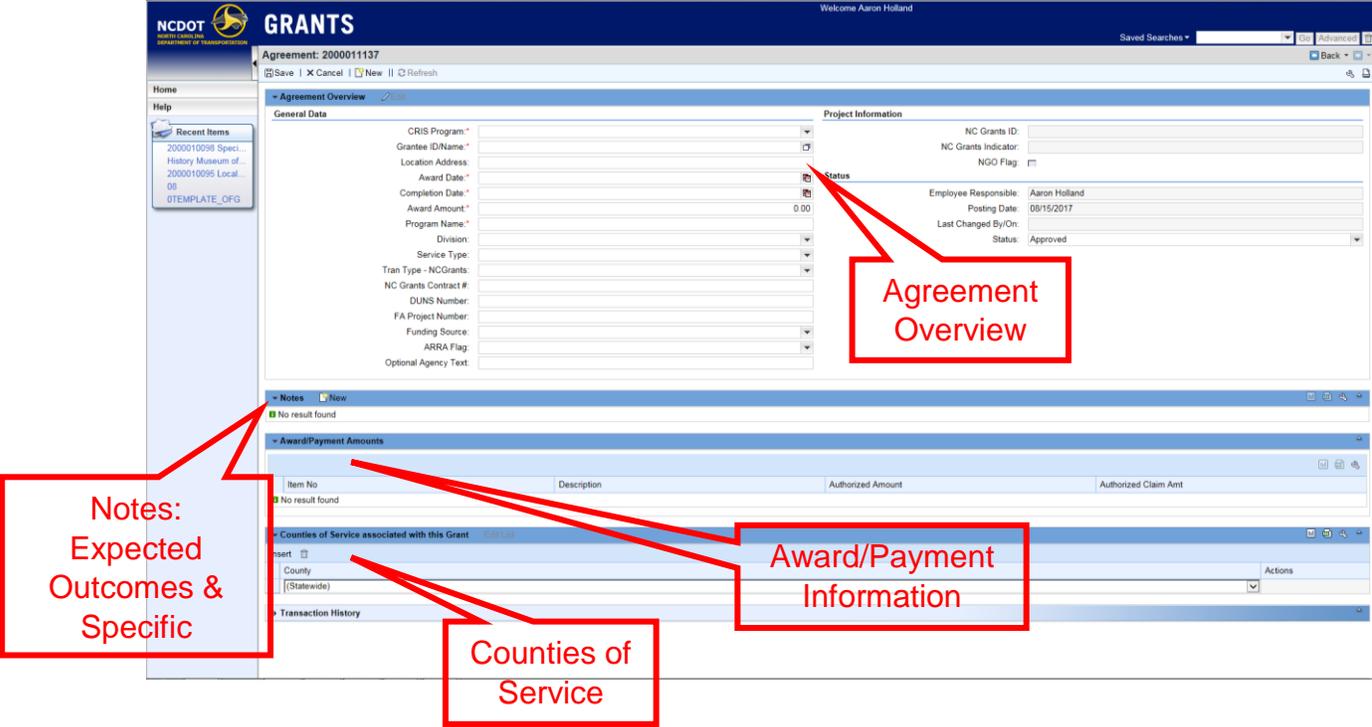
NCOB Award ID:	2599	Federal Award N...:	U50DP000799
Award Title:	National Asthma Awareness Progr	CFDA Number:	93.165
Department / Age...:	Division of Health & Human Ser	Award Type:	Block Grant
End Date:		Fund:	
Company:		Arra Flag:	0

# 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.

The screenshot shows the NCDOT GRANTS system interface. The top navigation bar includes the NCDOT logo, the word "GRANTS", and a user greeting "Welcome Aaron Holland". Below the navigation bar, the current agreement is identified as "Agreement: 2000011137". The main content area is titled "Agreement Overview" and is divided into three sections: "General Data", "Project Information", and "Status". A red box highlights the "General Data" section, and a red arrow points to the "CRIS Program" dropdown menu. The "General Data" section includes fields for Grantee ID/Name, Location Address, Award Date, Completion Date, Award Amount (0.00), Program Name, Division, Service Type, Tran Type - NCGrants, NC Grants Contract #, DUNS Number, FA Project Number, Funding Source, ARRA Flag, and Optional Agency Text. The "Project Information" section includes fields for NC Grants ID, NC Grants Indicator, and NGO Flag. The "Status" section includes fields for Employee Responsible (Aaron Holland), Posting Date (08/15/2017), Last Changed By/On, and Status (Approved). Below the main sections, there are tabs for "Notes" (No result found), "Award/Payment Amounts" (No result found), "Counties of Service associated with this Grant" (Insert, County, (Statewide), Actions), and "Transaction History".

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.

The screenshot shows the NCDOT GRANTS system interface. The top navigation bar includes the word "GRANTS" and a user greeting "Welcome Amira Hunt". Below the navigation bar, the current agreement is identified as "Agreement: 2000012413". The main content area is titled "Agreement Overview" and is divided into three sections: "General Data", "Project Information", and "Status". A red box highlights the "CRIS Program" dropdown menu, and a red arrow points to the "Cancel" button in the top navigation bar. The "General Data" section includes fields for Grantee ID/Name, Location Address, Award Date, Completion Date, Award Amount (0.00), Program Name, Division, Service Type, Tran Type - NCGrants, NC Grants Contract #, DUNS Number, Federal Project Number, Funding Source, ARRA Flag, and Optional Agency Text. The "Project Information" section includes fields for NC Grants ID, NC Grants Indicator, and NGO Flag. The "Status" section includes fields for Employee Responsible (Amira Hunt), Posting Date (08/23/2017), Last Changed By/On, and Status (Approved).

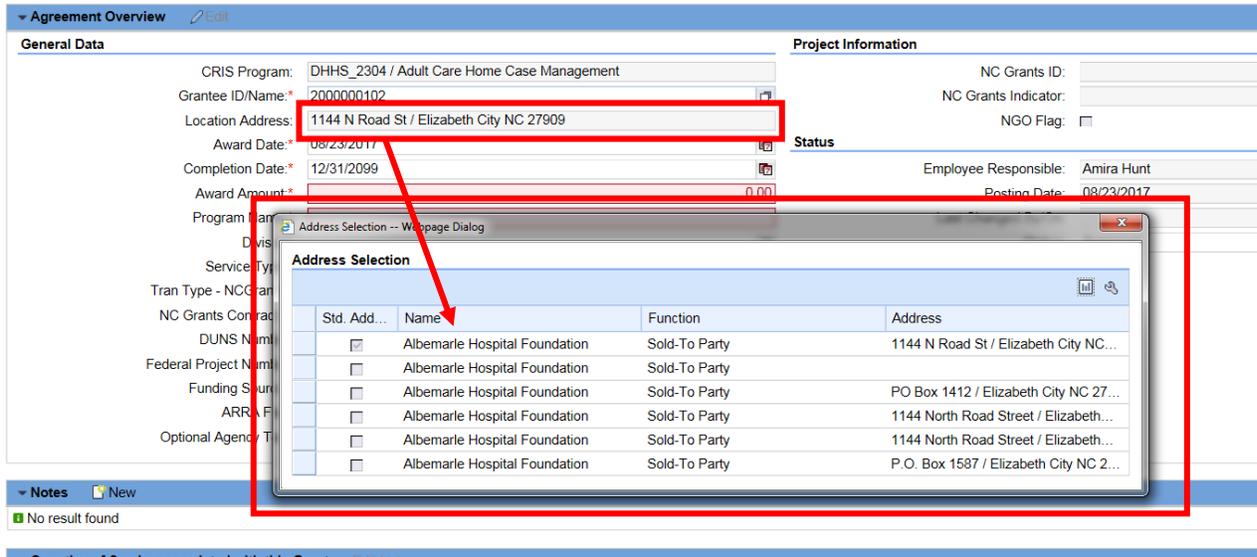
2. **Grantee ID/Name** – Select the grantee. When you click on the box in the right-hand side of Grantee ID/Name, a screen will open, such as the one below, where you can search for the grantee by name or tax ID. Select the correct grantee.

**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.](#)

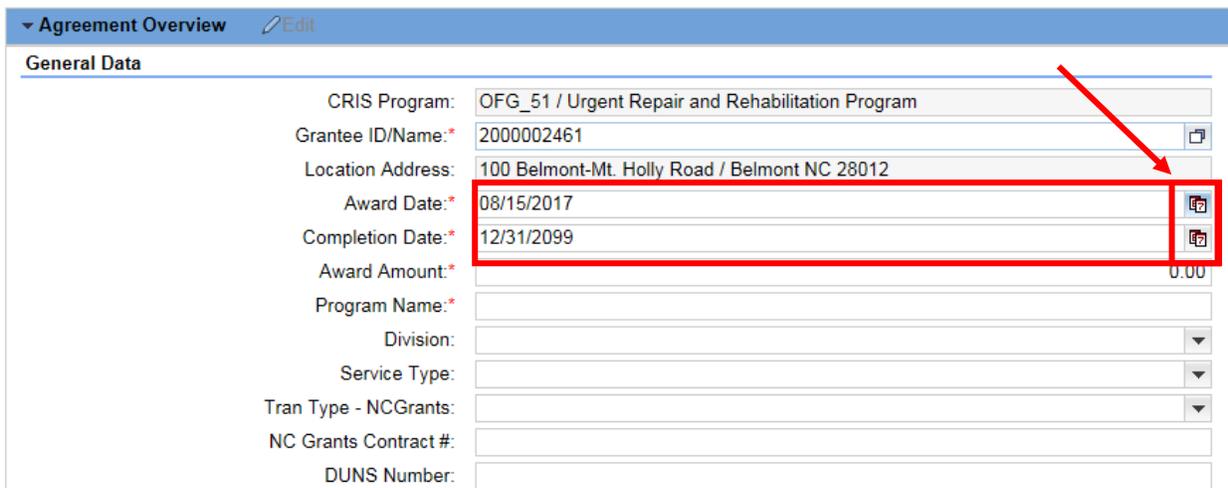
The screenshot displays the 'Agreement Overview' page with a search dialog for grantees. The background shows the 'General Data' and 'Project Information' sections. The 'Grantee ID/Name' field is highlighted with a red box, and a red arrow points to a search icon. The search dialog is open, showing search criteria for 'All Accounts' with 'Tax ID' and 'Name' options. The 'Search' button is highlighted with a red box and a red arrow. Below the search criteria is a 'Result List' table with columns for Tax ID, BP Number, Name, Street, City, Region, and Postal code.

Tax ID	BP Number	Name	Street	City	Region	Postal..
20-1709570	2000000191	A & R Investments of Burgaw, LLC DBA...	1001 R...	Burgaw	North C...	28425
20-5173144	2000000127	A Brighter Start Academy Inc.	113 Gal...	Point-H...	North C...	27964
26-0057395	2000000129	A C W L C II, Inc.	2005 Le...	Clemm...	North C...	27012
56-1884652	2000000187	Abundant Living Adult Day Care, Inc.	1416-A...	Salisbury	North C...	28144
58-1509483	2000000235	Adult Life Programs Inc	3390 S...	Maiden	North C...	28850
56-1835168	2000000086	Ahoskie Christian Center	P.O. Bo...	Ahoskie	North C...	27910
43-2031990	2000000102	Albemarle Hospital Foundation	1144 N...	Elizabet...	North C...	27909
56-0771084	2000000233	Alcohol/Drug Council Of NC	1201 N...	Durham	North C...	27701

- 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.



- 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.

▼ Agreement Overview [Edit](#)

**General Data**

CRIS Program:	DHHS_2304 / Adult Care Home Case Management
Grantee ID/Name:*	2000000127
Location Address:	113 Gallop Road / Point-Harbor NC 27964
Award Date:*	08/23/2017
Completion Date:*	12/31/2099
Award Amount:*	50000
Program Name:*	
Division:	
Service Type:*	
Tran Type - NCGrants:*	
NC Grants Contract #:	
DUNS Number:	
Federal Project Number:	
Funding Source:*	
ARRA Flag:	
Optional Agency Text:	

6. Program Name – Fill in the program name.

▼ Agreement Overview [Edit](#)

**General Data**

CRIS Program:	DHHS_2304 / Adult Care Home Case Management
Grantee ID/Name:*	2000000127
Location Address:	113 Gallop Road / Point-Harbor NC 27964
Award Date:*	08/23/2017
Completion Date:*	12/31/2099
Award Amount:*	50000
Program Name:*	Childcare Program 2017
Division:	
Service Type:*	
Tran Type - NCGrants:*	
NC Grants Contract #:	
DUNS Number:	
Federal Project Number:	
Funding Source:*	
ARRA Flag:	
Optional Agency Text:	

- 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.

▼ Agreement Overview [Edit](#)

**General Data**

CRIS Program: DHHS\_2304 / Adult Care Home Case Management

Grantee ID/Name:\* 2000000127

Location Address: 113 Gallop Road / Point-Harbor NC 27964

Award Date:\* 08/23/2017

Completion Date:\* 12/31/2099

Award Amount:\* 50000

Program Name:\* Childcare Program 2017

Division: 

Service Type:\*

Tran Type - NCGrants:\*

NC Grants Contract #: Division of Central Management & Support

DUNS Number: Child Development & Early Edu

Federal Project Number: Health Service Regulation

Funding Source:\* Medical Assistance

ARRA Flag:

Optional Agency Text:

- 8. Service Type** – Select the service type.

▼ Agreement Overview [Edit](#)

**General Data**

CRIS Program: DHHS\_2304 / Adult Care Home Case Management

Grantee ID/Name:\* 2000000127

Location Address: 113 Gallop Road / Point-Harbor NC 27964

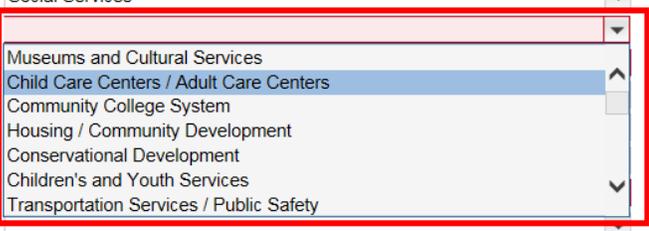
Award Date:\* 08/23/2017

Completion Date:\* 12/31/2099

Award Amount:\* 50000

Program Name:\* Childcare Program 2017

Division: Social Services

Service Type:\* 

Tran Type - NCGrants:\*

NC Grants Contract #:

DUNS Number: Housing / Community Development

Federal Project Number: Conservational Development

Funding Source:\* Children's and Youth Services

ARRA Flag:

Optional Agency Text:

9. Tran Type – NCGrants – Select the transaction type.

Agreement Overview [Edit](#)

**General Data**

CRIS Program:	DHHS_2304 / Adult Care Home Case Management
Grantee ID/Name:*	2000000127
Location Address:	113 Gallop Road / Point-Harbor NC 27964
Award Date:*	08/23/2017
Completion Date:*	12/31/2099
Award Amount:*	50000
Program Name:*	Childcare Program 2017
Division:	Social Services
Service Type:*	Child Care Centers / Adult Care Centers
Tran Type - NCGrants:*	<div style="border: 2px solid red; padding: 2px;">Direct Loans Direct Payments for Specified Use Direct Payments for Unrestricted Use Formula Grants Guaranteed/Insured Loans Project Grants</div>
NC Grants Contract #:	
DUNS Number:	
Federal Project Number:	
Funding Source:*	
ARRA Flag:	
Optional Agency Text:	

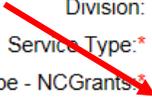


10. NC Grants Contract # - Fill in the contract number.

Agreement Overview [Edit](#)

**General Data**

CRIS Program:	DHHS_2304 / Adult Care Home Case Management
Grantee ID/Name:*	2000000127
Location Address:	113 Gallop Road / Point-Harbor NC 27964
Award Date:*	08/23/2017
Completion Date:*	12/31/2099
Award Amount:*	50000
Program Name:*	Childcare Program 2017
Division:	Social Services
Service Type:*	Child Care Centers / Adult Care Centers
Tran Type - NCGrants:*	Formula Grants
NC Grants Contract #:	123456789
DUNS Number:	
Federal Project Number:	
Funding Source:*	
ARRA Flag:	
Optional Agency Text:	



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

▼ Agreement Overview [Edit](#)

**General Data**

CRIS Program:	DHHS_2304 / Adult Care Home Case Management
Grantee ID/Name:*	2000000127
Location Address:	113 Gallop Road / Point-Harbor NC 27964
Award Date:*	08/23/2017
Completion Date:*	12/31/2099
Award Amount:*	50000
Program Name:*	Childcare Program 2017
Division:	Social Services
Service Type:*	Child Care Centers / Adult Care Centers
Tran Type - NCGrants:*	Formula Grants
NC Grants Contract #:	123456789
DUNS Number:	987654321
Federal Project Number:	
Funding Source:*	
ARRA Flag:	
Optional Agency Text:	

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

▼ Agreement Overview [Edit](#)

**General Data**

CRIS Program:	DHHS_2304 / Adult Care Home Case Management
Grantee ID/Name:*	2000000127
Location Address:	113 Gallop Road / Point-Harbor NC 27964
Award Date:*	08/23/2017
Completion Date:*	12/31/2099
Award Amount:*	50000
Program Name:*	Childcare Program 2017
Division:	Social Services
Service Type:*	Child Care Centers / Adult Care Centers
Tran Type - NCGrants:*	Formula Grants
NC Grants Contract #:	123456789
DUNS Number:	987654321
Federal Project Number:	77777777
Funding Source:*	
ARRA Flag:	
Optional Agency Text:	

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

Agreement Overview [Edit](#)

**General Data**

CRIS Program: DHHS\_2304 / Adult Care Home Case Management

Grantee ID/Name:\* 2000000127

Location Address: 113 Gallop Road / Point-Harbor NC 27964

Award Date:\* 08/23/2017

Completion Date:\* 12/31/2099

Award Amount:\* 50000

Program Name:\* Childcare Program 2017

Division: Social Services

Service Type:\* Child Care Centers / Adult Care Centers

Tran Type - NCGrants:\* Formula Grants

NC Grants Contract #: 123456789

DUNS Number: 987654321

Federal Project Number: 77777777

Funding Source:\* **State**

ARRA Flag: Federal

Optional Agency Text:

Notes [New](#)

No result found

Counties of Service associated with this Grant [Edit List](#)

Insert

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

Agreement Overview [Edit](#)

**General Data**

CRIS Program: DHHS\_2304 / Adult Care Home Case Management

Grantee ID/Name:\* 2000000127

Location Address: 113 Gallop Road / Point-Harbor NC 27964

Award Date:\* 08/23/2017

Completion Date:\* 12/31/2099

Award Amount:\* 50000

Program Name:\* Childcare Program 2017

Division: Social Services

Service Type:\* Child Care Centers / Adult Care Centers

Tran Type - NCGrants:\* Formula Grants

NC Grants Contract #: 123456789

DUNS Number: 987654321

Federal Project Number: 77777777

Funding Source:\* State

ARRA Flag: No

Optional Agency Text:

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.

Agreement Overview [Edit](#)

**General Data**

CRIS Program: DHHS\_2304 / Adult Care Home Case Management  
 Grantee ID/Name: 2000000127 / A Brighter Start Academy Inc.  
 Location Address: 113 Gallop Road / Point-Harbor NC 27964  
 Award Date: 08/30/2017  
 Completion Date: 12/31/2099  
 Award Amount: 50000  
 Program Name: Childcare Program 2017  
 Division: Division of Child Development & Early Ed  
 Service Type: Child Care Centers / Adult Care Centers  
 Tran Type - NCGrants: Formula Grants  
 NC Grants Contract #: 123456789  
 DUNS Number: 987654321  
 Federal Project Number: 777777777  
 Funding Source: State  
 Optional Agency Text:

**Project Information**

NC Grants ID:  
 NC Grants Indicator:  
 NGO Flag:   
 ARRA Flag:

Employee Responsible: Amira Hunt  
 Posting Date: 08/30/2017  
 Last Changed By/On:  
 Status: Approved

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.”

Agreement Overview [Edit](#)

**General Data**

CRIS Program: DHHS\_2304 / Adult Care Home Case Management  
 Grantee ID/Name: 2000000127  
 Location Address: 113 Gallop Road / Point-Harbor NC 27964  
 Award Date: 08/23/2017  
 Completion Date: 12/31/2099  
 Award Amount: 50000  
 Program Name: Childcare Program 2017  
 Division: Social Services  
 Service Type: Child Care Centers / Adult Care Centers  
 Tran Type - NCGrants: Formula Grants  
 NC Grants Contract #: 123456789  
 DUNS Number: 987654321  
 Federal Project Number: 777777777  
 Funding Source: State  
 ARRA Flag: No  
 Optional Agency Text:

**Project Information**

NC Grants ID:  
 NC Grants Indicator:  
 NGO Flag:

**Status**

Employee Responsible: Amira Hunt  
 Posting Date: 08/23/2017  
 Last Changed By/On:  
 Status:   
 Approved  
 Approved  
 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.

The screenshot shows the 'GRANTS' interface for 'Agreement: 2000013763, Childcare Program 2017'. The 'Notes' section at the bottom has a 'Text' type selected, with a red box around the text input area containing 'Enter Expected Outcomes Here' and 'Enter Special Restrictions Here'. A red arrow points to the 'Text' type selection.

Actions	Text Type	Text
	Expected Outcomes	Enter Expected Outcomes Here
	Specific Restrictions	Enter Special Restrictions Here

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.

The screenshot shows the 'Notes' screen with a 'Back' button highlighted by a red box. The 'Text Type' dropdown is set to 'Expected Outcomes', and the 'Text' input area contains the text 'The expected outcomes are...'. A red arrow points to the 'Back' button, and another red arrow points to the 'Text Type' dropdown.

Notes

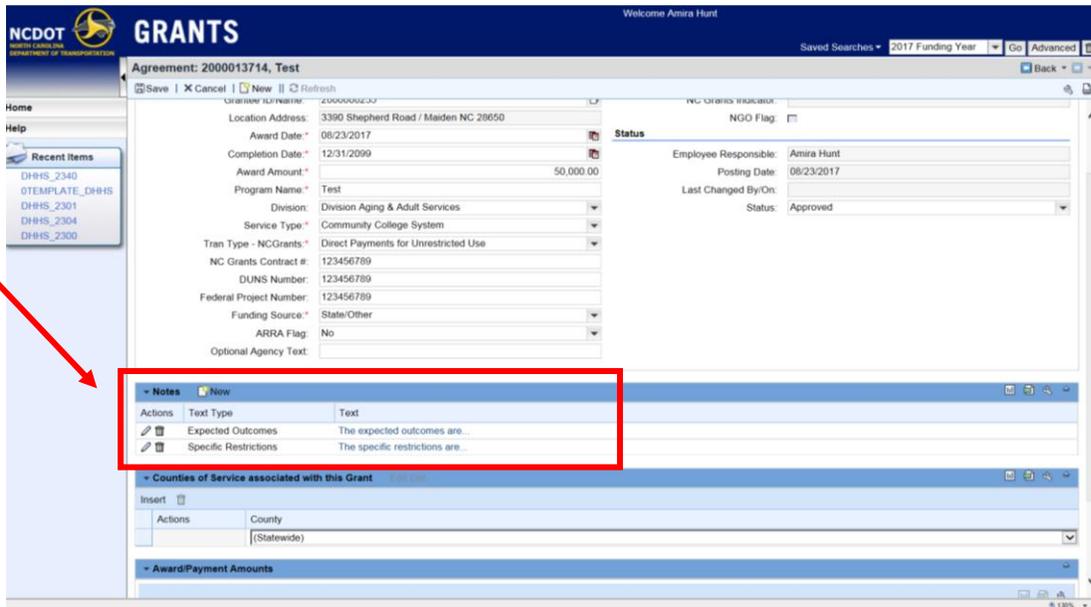
Back Cancel

Text Type: Expected Outcomes

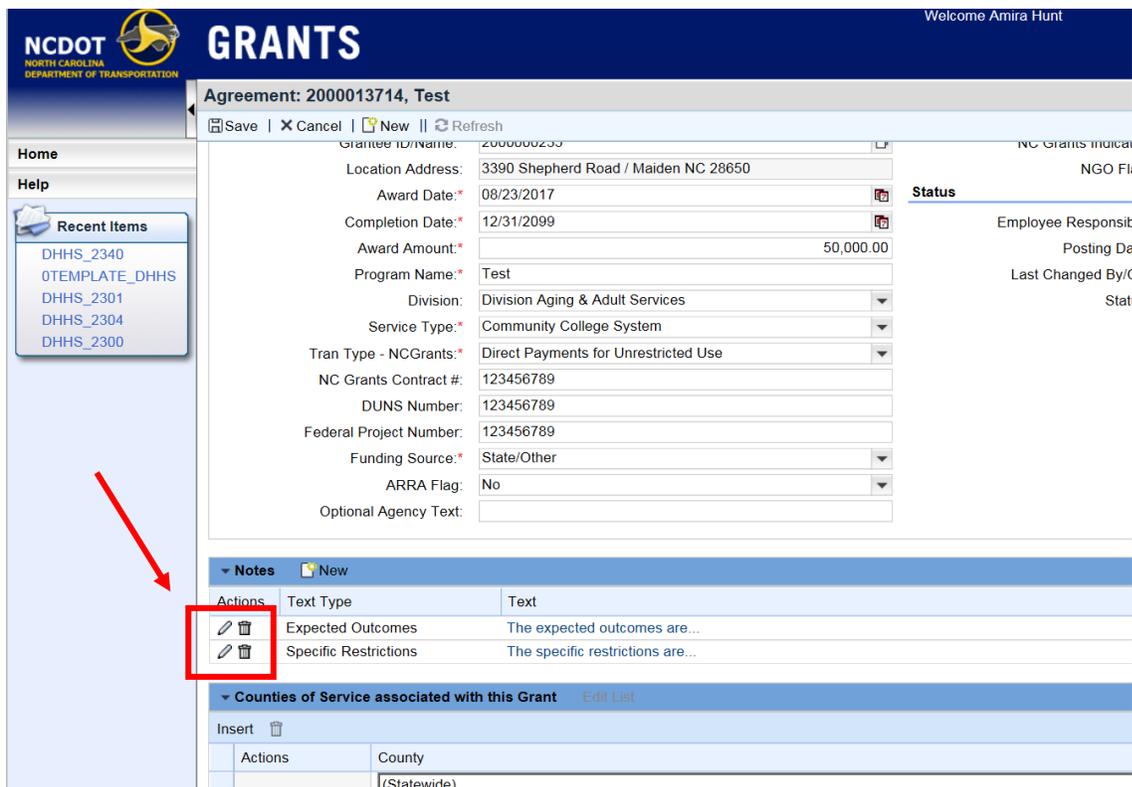
Text

The expected outcomes are...|

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.

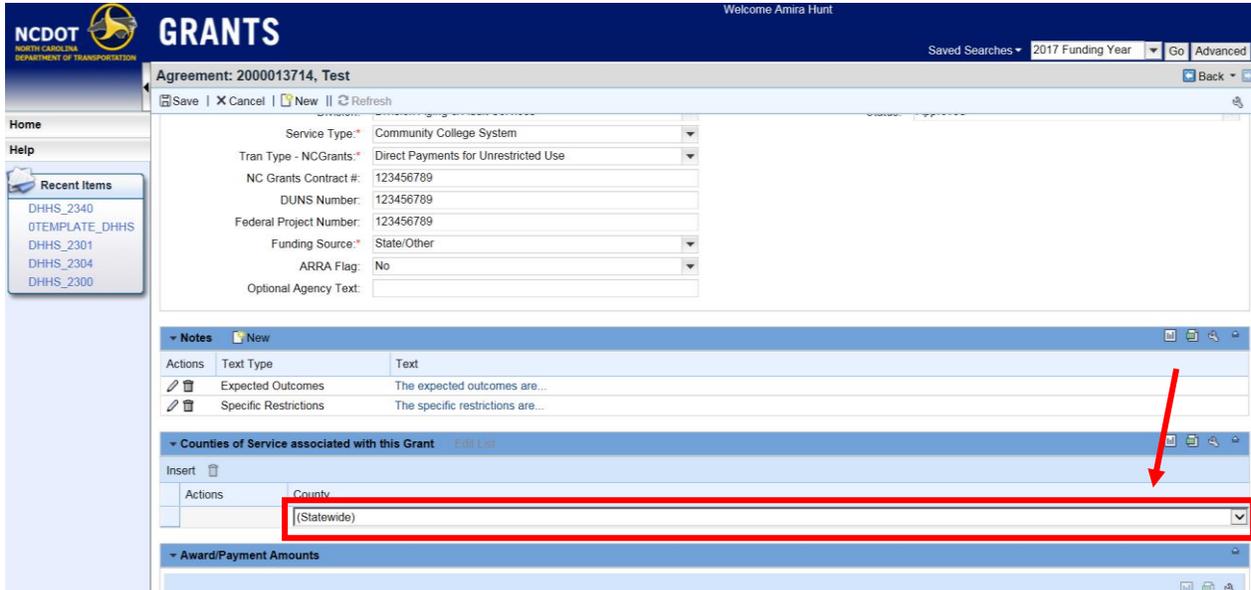


4. **Edit/Delete Expected Outcomes or Specific Restrictions** – To edit or delete expected outcomes or specific restrictions, click on the icon(s) located to the left under Actions.

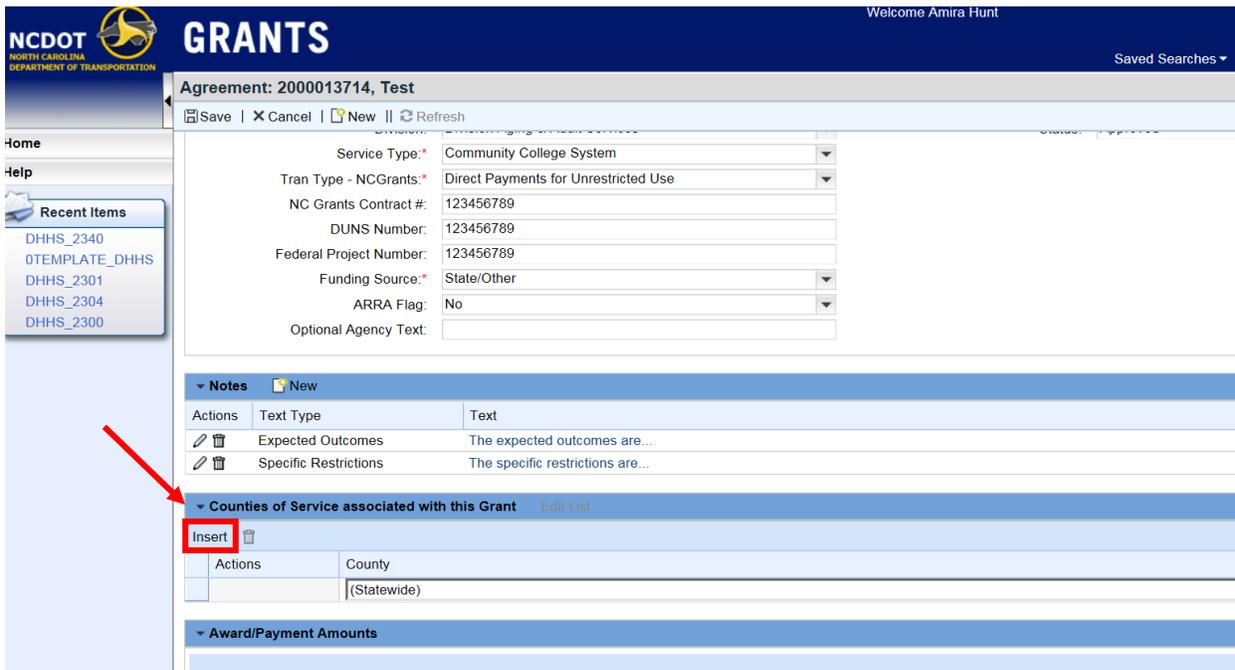


# Counties of Service

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.

The screenshot shows the NCDOT GRANTS application interface. The main content area displays details for Agreement 2000013714, Test. Below this, there is a 'Notes' section and a 'Counties of Service associated with this Grant' section. The 'Counties of Service' section contains a table with columns 'Actions' and 'County'. The 'Avery' county entry is highlighted with a blue box, indicating it is selected. A red arrow points from a text box below to this blue box.

Actions	County
	(Statewide)
	Avery

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.

This close-up screenshot focuses on the 'Counties of Service' table. The 'Avery' county entry is selected, as indicated by the blue box. A red box highlights the trash icon in the 'Actions' column for this entry, with a red arrow pointing to it. Another red arrow points to the 'Insert' button above the table.

Actions	County
	(Statewide)
	Avery

# 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.

The screenshot displays the NCDOT GRANTS system interface. The main content area is titled "Agreement: 2000011137" and is divided into several sections:

- General Data:** Includes fields for CRIS Program, Grantee ID/Name, Location Address, Award Date, Completion Date, Award Amount (0.00), Program Name, Division, Service Type, Tran Type - NCGrants, NC Grants Contract #, DUNS Number, FA Project Number, Funding Source, ARRA Flag, and Optional Agency Text.
- Project Information:** Includes fields for NC Grants ID, NC Grants Indicator, NGO Flag, Employee Responsible (Aaron Holland), Posting Date (08/15/2017), Last Changed By/On, and Status (Approved).
- Notes:** A section with a "New" button and a message "No result found".
- Award/Payment Amounts:** This section is highlighted with a red box. It contains a table with the following columns: Item No, Description, Authorized Amount, and Authorized Claim Amt. Below the table, it shows "No result found".
- Counties of Service associated with this Grant:** Includes an "Insert" button, a "County" dropdown menu (currently showing "(Statewide)"), and an "Actions" button.
- Transaction History:** A section at the bottom of the interface.

A red arrow points from the left sidebar towards the "Award/Payment Amounts" 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.

The screenshot displays the NCDOT GRANTS system interface. The top navigation bar includes the NCDOT logo, the word "GRANTS", and a user welcome message "Welcome Aaron Holland". The main content area is titled "Agreement: 2000011137" and contains several sections:

- Agreement Overview:** This section is divided into "General Data" and "Project Information".
  - General Data:** Fields include CRIS Program, Grantee ID/Name, Location Address, Award Date, Completion Date, Award Amount (0.00), Program Name, Division, Service Type, Tran Type - NCGrants, NC Grants Contract #, DUNS Number, FA Project Number, Funding Source, ARRA Flag, and Optional Agency Text.
  - Project Information:** Fields include NC Grants ID, NC Grants Indicator, NGO Flag, Employee Responsible (Aaron Holland), Posting Date (08/15/2017), Last Changed By/On, and Status (Approved).
- Notes:** A section with a "New" button and a message "No result found".
- Award Payment Amounts:** A table with columns for Item No, Description, Authorized Amount, and Authorized Claim Amt. A message "No result found" is displayed below the table.
- Counties of Service associated with this Grant:** A section with an "Insert" button and a dropdown menu for "County" (currently set to "(Statewide)").
- Transaction History:** A section at the bottom of the page, highlighted with a red rectangular box.

# Save Award

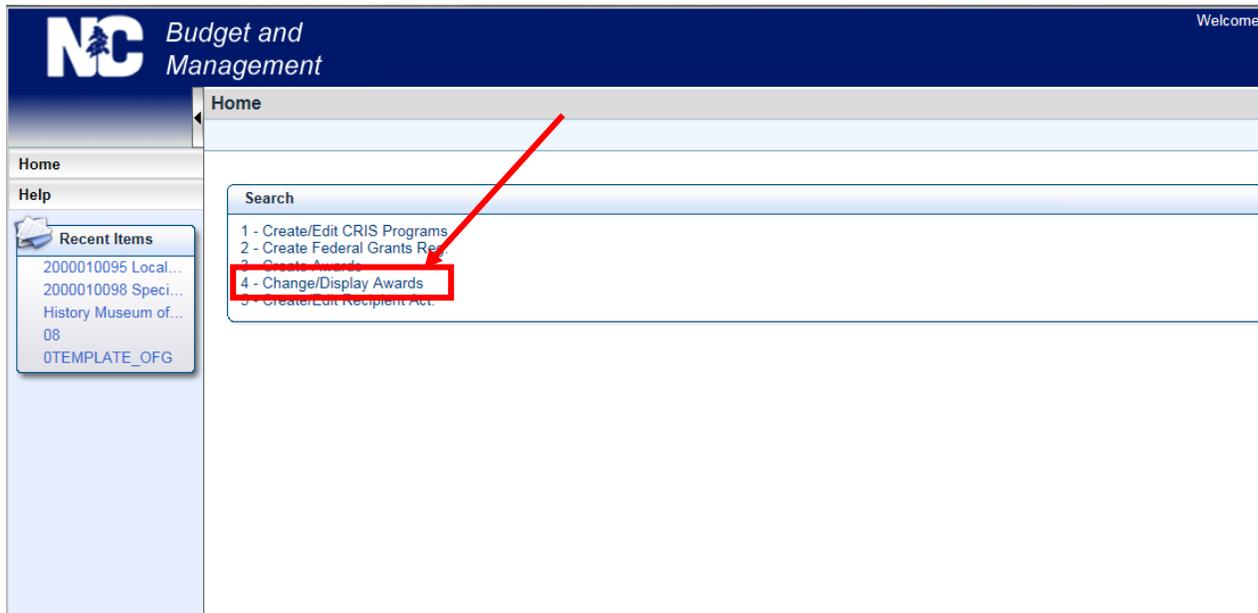
Once you have completed all the steps, you can save the award agreement by clicking on the save icon at the top. If you need to make any changes to the award, see the [Change/Display Awards](#) section.

The screenshot displays the NCDOT GRANTS application interface. At the top left, the NCDOT logo and 'GRANTS' title are visible. The user is logged in as 'Welcome Aaron Holland'. The browser address bar shows 'http://.../grant: 2000011137'. A red box highlights the 'Save' button in the top navigation bar, with a red arrow pointing to it. The main content area is titled 'Agreement Overview' and contains several sections: 'General Data' with fields for CRIS Program, Grantee ID/Name, Location Address, Award Date, Completion Date, Award Amount (0.00), Program Name, Division, Service Type, Tran Type - NCGrants, NC Grants Contract #, DUNS Number, FA Project Number, Funding Source, ARRA Flag, and Optional Agency Text; 'Project Information' with fields for NC Grants ID, NC Grants Indicator, and NGO Flag; and 'Status' with fields for Employee Responsible (Aaron Holland), Posting Date (08/15/2017), Last Changed By/On, and Status (Approved). Below these sections are tabs for 'Notes' (No result found), 'AwardPayment Amounts' (No result found), 'Counties of Service associated with this Grant' (with a 'View List' link), and 'Transaction History'.

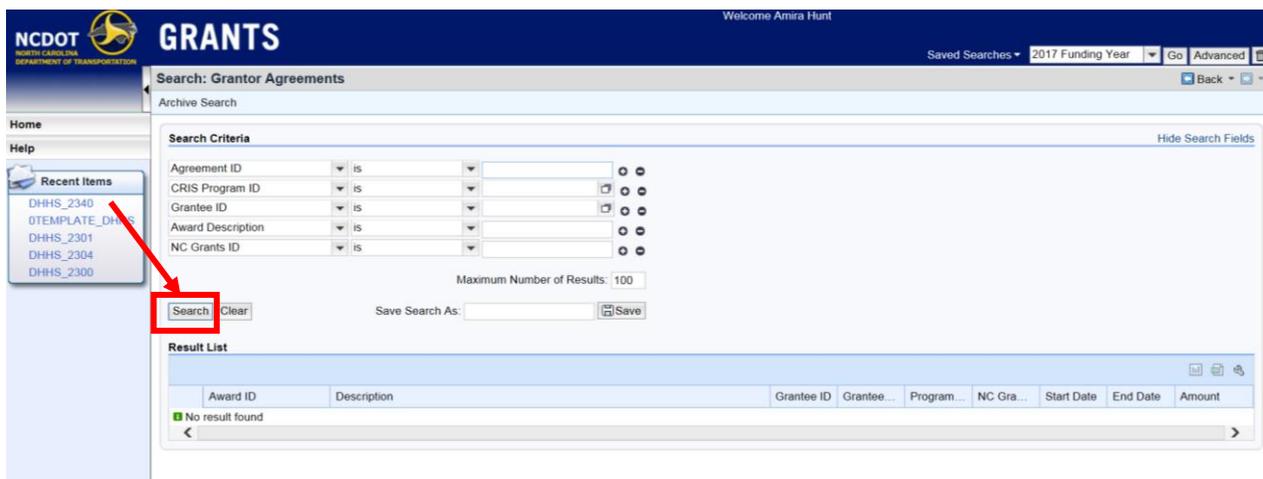
# Change/Display Awards

## 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.



- Select Award** – Once you've found the award you'd like to edit or display, click on the correct Award ID.

Search: Grantor Agreements

Archive Search

More than 100 entries found; limit search criteria or change settings

Search Criteria

Agreement ID is  
CRIS Program ID is  
Grantee ID is  
Award Description is  
NC Grants ID is

Maximum Number of Results: 100

Search Clear Save Search As: Save

Result List

Award ID	Description	Grantee...	Grantee...	Progra...	NC Gra...	Start Date	End D
2000005702	Hospital Flexibility Grant/33032	2000001...	Stroudw...	DHHS...	50383	11/01/20...	08/31/...
2000005703	Prescription Assistance Program/Medicati	2000001...	Brunswi...	DHHS...	43167	08/01/20...	07/31/...
2000005704	Prescription Assistance Program/MAP Gran	2000001...	Brunswi...	DHHS...	46145	08/01/20...	07/31/...
2000005706	Prescription Assistance Program/Medicati	2000001...	Brunswi...	DHHS...	49252	08/01/20...	07/31/...
2000005707	Medication Assistance Program (MAP) 3452	2000001...	Brunswi...	DHHS...	52410	08/01/20...	07/31/...
2000005708	Medication Assistance Program Grant/3616	2000001...	Brunswi...	DHHS...	56162	08/01/20...	07/31/...
2000005709	Community Health Grant/30989	2000000...	Moore F...	DHHS...	45855	07/01/20...	06/30/...
2000005710	Community Health Grant/32428	2000000...	Moore F...	DHHS...	48709	07/01/20...	06/30/...
2000005711	HealthNet Transition/33055	2000000...	Moore F...	DHHS...	49905	08/01/20...	06/30/...
2000005712	Community Health Grant/33957	2000000...	Moore F...	DHHS...	51891	07/01/20...	06/30/...

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

- 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.

Agreement: 2000005702, Hospital Flexibility Grant/33032

Save | X Cancel | New | Refresh

Home Help

Recent Items

Agreement Overview Edit

General Data

CRIS Program: DHHS\_2400 / Small Rural Hospital Improvement Program  
Grantee ID/Name: 2000001368 / Stroudwater Associates  
Location Address: 50 Sewall St, Suite 102 / Portland ME 04102  
Award Date: 11/01/2015  
Completion Date: 08/31/2018  
Award Amount: 299,990.00  
Program Name: Hospital Flexibility Grant/33032  
Division: Division of Central Management & Support  
Service Type: For-Profit Non-governmental Organizations  
Tran Type - NCGrants: Project Grants  
NC Grants Contract #: G20203303216CAH  
DUNS Number: 966381506  
Federal Project Number: 2H54R4000311700  
Funding Source: Federal  
ASRA Flag: No  
Optional Agency Text: PO #

Project Information

NC Grants ID: 50383  
NC Grants Indicator:  
NGO Flag:

Status

Employee Responsible: Firefighter All Functio  
Posting Date: 07/25/2017  
Last Changed By/On: FF\_FUNCTION / 07/25/2017  
Status: Approved

Notes

Expected Outcomes: 22 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 operations of critical access hospitals.

Award Payment Amounts

Item No	Description	Authorized Amount	Authorized Claim Amt
10	Awards	299,990.00 USD	0.00 USD

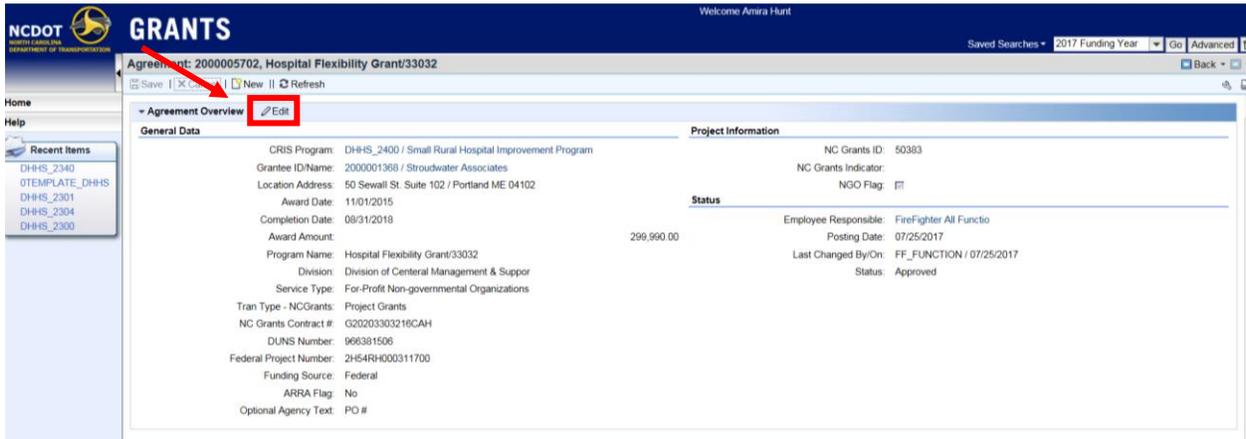
Counties of Service associated with this Grant Edit List

County
<input type="checkbox"/> Alleghany
<input type="checkbox"/> Ashe
<input type="checkbox"/> Avery
<input type="checkbox"/> Bertie
<input type="checkbox"/> Bladen

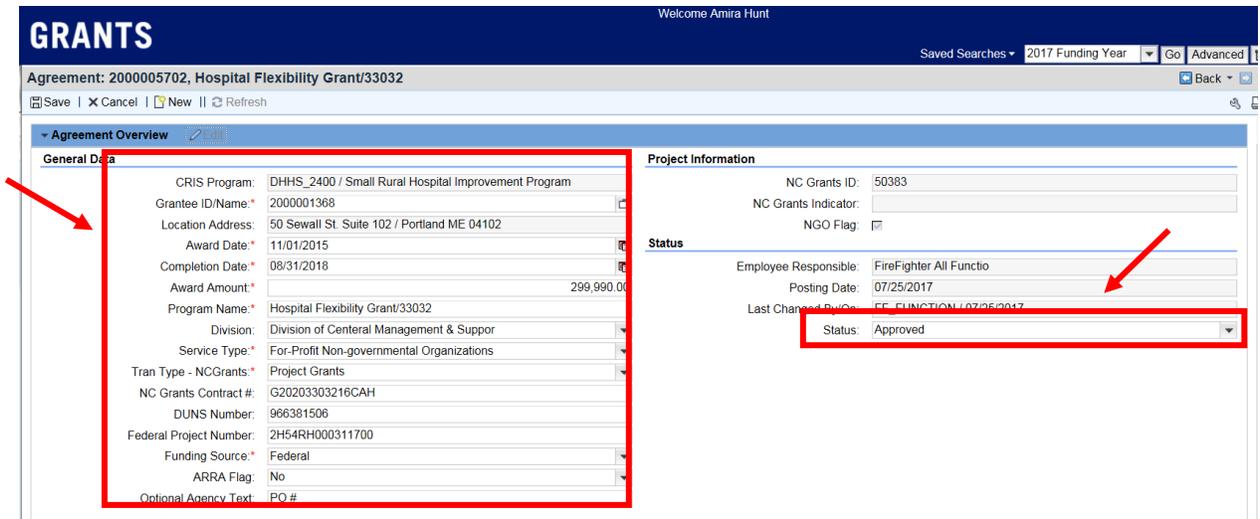
Transaction History

# 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.

GRANTS  
Welcome Amira Hunt  
Saved Searches 2017 Funding Year Go Advanced Back

Agreement: 2000005702, Hospital Flexibility Grant/33032  
Save Cancel New Refresh

Agreement Overview Edit

General Data	Project Information
CRIS Program: DHHS_2400 / Small Rural Hospital Improvement Program	NC Grants ID: 50383
Grantee ID/Name: 2000001368	NC Grants Indicator:
Location Address: 50 Sewall St. Suite 102 / Portland ME 04102	NGO Flag:
Award Date: 11/01/2015	Status
Completion Date: 08/31/2018	Employee Responsible: FireFighter All Functio
Award Amount: 299,990.00	Posting Date: 07/25/2017
Program Name: Hospital Flexibility Grant/33032	Last Changed By/On: FF_FUNCTION / 07/25/2017
Division: Division of Central Management & Suppor	Status: Approved
Service Type: For-Profit Non-governmental Organizations	
Tran Type - NCGrants: Project Grants	

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.

NCDOT GRANTS  
Welcome Amira Hunt  
Saved Searches 2017 Funding Year Go Advanced Back

Agreement: 2000005702, Hospital Flexibility Grant/33032  
Save Cancel New Refresh

Home Help

Recent Items  
DHHS\_2340  
TEMPLATE\_DHHS  
DHHS\_2301  
DHHS\_2304  
DHHS\_2300

General Data	Project Information
CRIS Program: DHHS_2400 / Small Rural Hospital Improvement Program	NC Grants ID: 50383
Grantee ID/Name: 2000001368 / Stroudwater Associates	NC Grants Indicator:
Location Address: 50 Sewall St. Suite 102 / Portland ME 04102	NGO Flag:
Award Date: 11/01/2015	Status
Completion Date: 08/31/2018	Employee Responsible: FireFighter All Functio
Award Amount: 299,990.00	Posting Date: 07/25/2017
Program Name: Hospital Flexibility Grant/33032	Last Changed By/On: FF_FUNCTION / 07/25/2017
Division: Division of Central Management & Suppor	Status: Approved
Service Type: For-Profit Non-governmental Organizations	
Tran Type - NCGrants: Project Grants	
NC Grants Contract #: G2003303216CAH	
DUNS Number: 962301506	
Federal Project Number: 2H54R-H000311700	
Funding Source: Federal	
ARRA Flag: No	
Optional Agency Text: PO #	

Notes New

Notes	Text Type	Text
	Expected Outcomes	22 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 operations of critical access hospitals.

Award Payment Amounts

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.

NCDOT GRANTS  
Welcome Amira Hunt

Notes  
Back

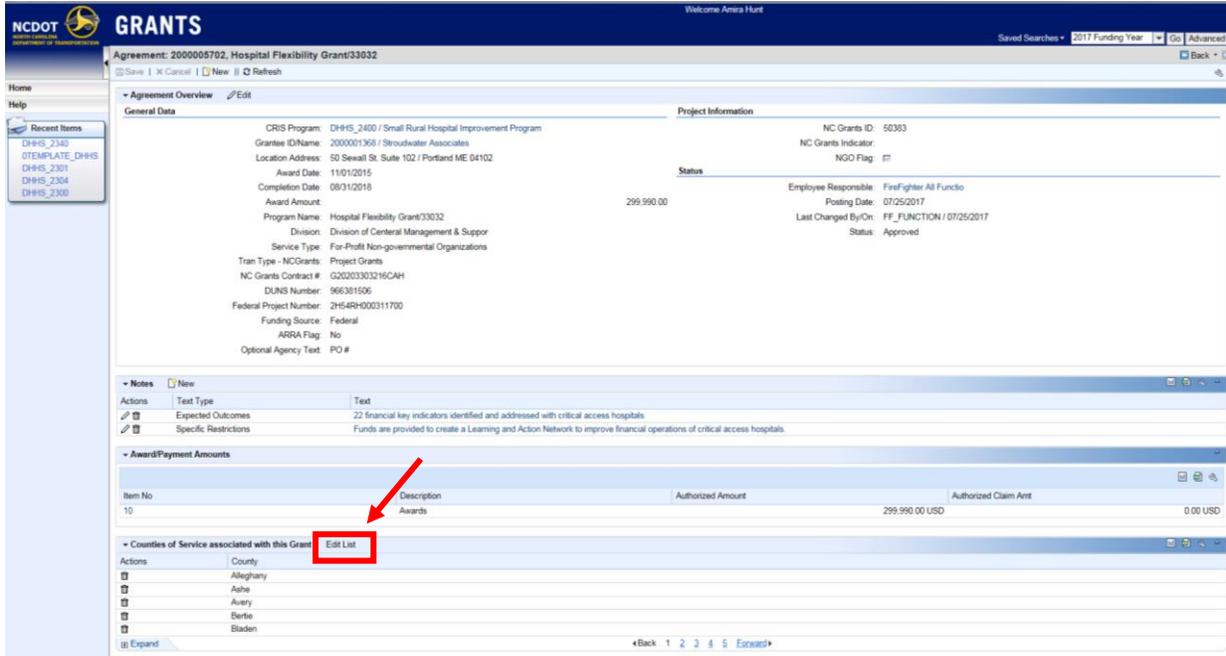
Home Help

Recent Items  
2000005702 Hospi...  
DHHS\_2340  
TEMPLATE\_DHHS  
DHHS\_2301  
DHHS\_2304

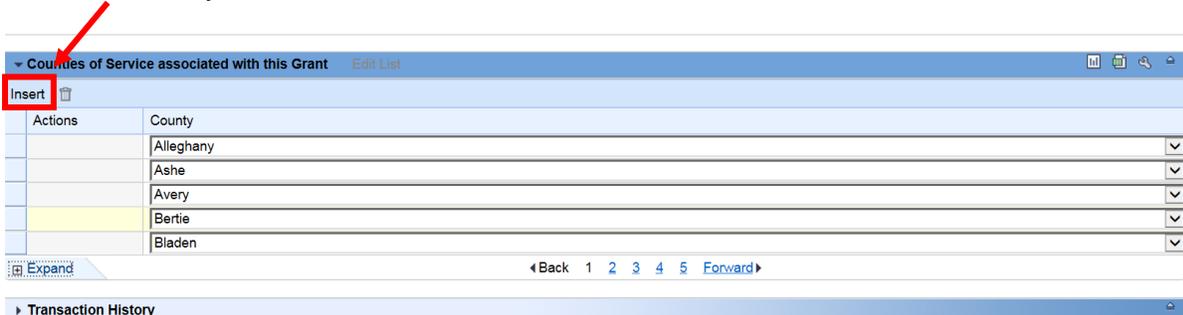
Text Type: Expected Outcomes

Text  
22 financial key indicators identified and addressed with critical access hospitals

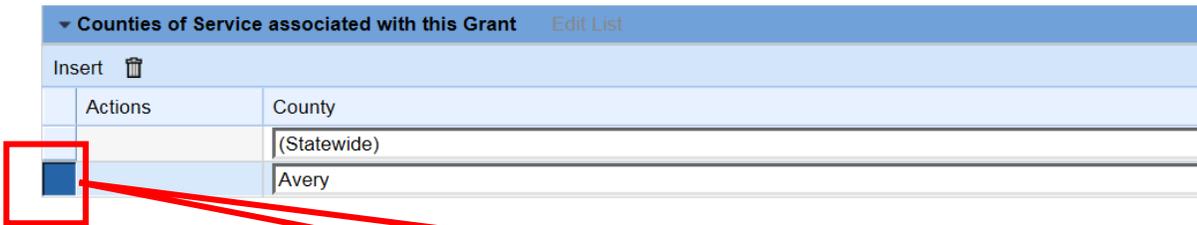
3. **Edit Award: Counties of Service associated with this Grant** – To edit the counties of service, click on Edit List at the top of the section.



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.

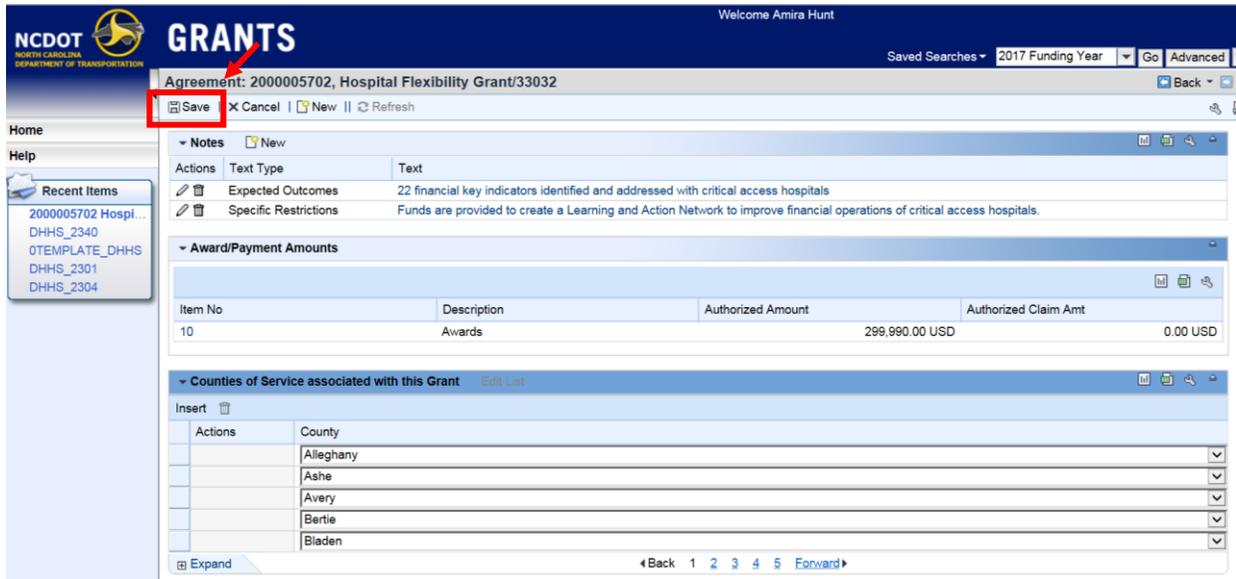


When a county is selected, the box next to it is filled in like in the example with Avery. If the county is selected, you will not be able to insert a new county. Be sure to unselect the county before inserting a new one.

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.

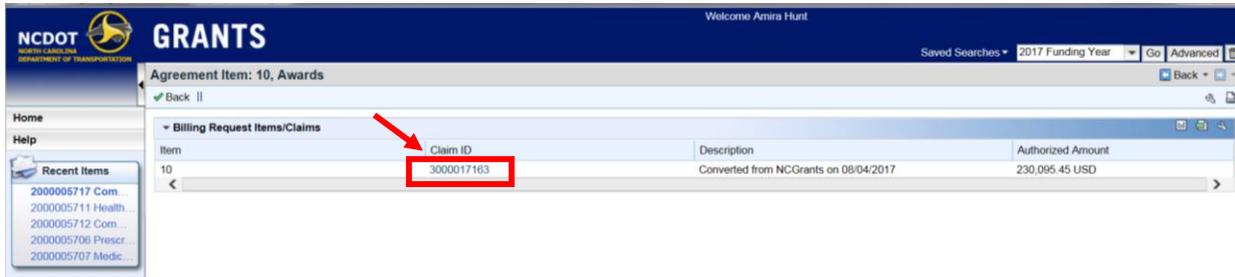
The screenshot shows the NCDOT GRANTS interface for Agreement 200005717, Community Care of NC/HealthNet/28003. The interface includes a sidebar with 'Recent Items' and a main content area with various fields and sections. A red arrow points to the 'Award/Payment Amounts' section, which is highlighted with a red box. This section contains a table with the following data:

Item No	Description	Authorized Amount	Authorized Claim Amt
10	Awards	242,000.00 USD	230,095.45 USD

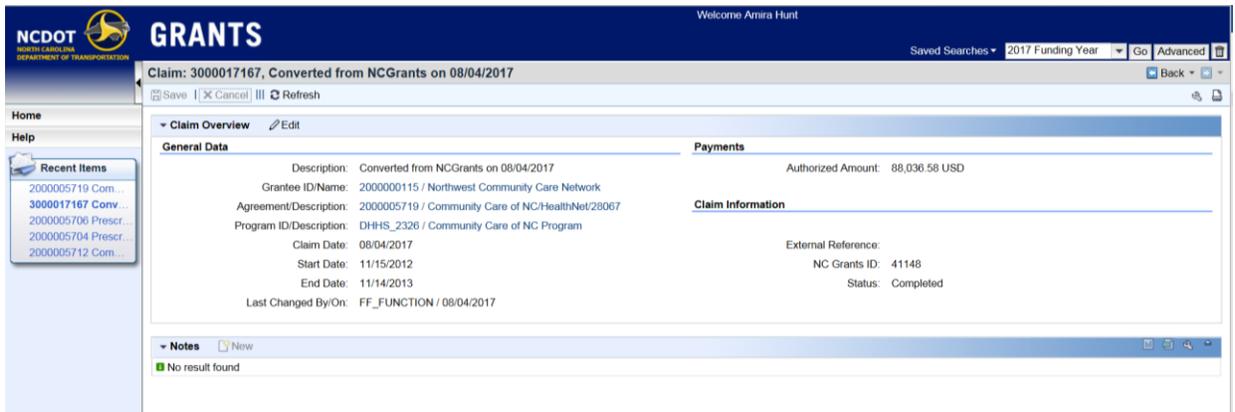
2. **View Claim** – To view more information on individual payments/claims, click on the item number associated with the specific claim.

This screenshot is similar to the first one but shows the 'View Claim' action. A red arrow points to the item number '10' in the 'Award/Payment Amounts' table, which is highlighted with a red box. The rest of the interface, including the sidebar and the main content area, remains the same as in the first screenshot.

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:



- Edit Payment Information** – Currently, OSBM and DOT are working adding a function to edit payment information in the system.

# Create/Edit Recipient Account

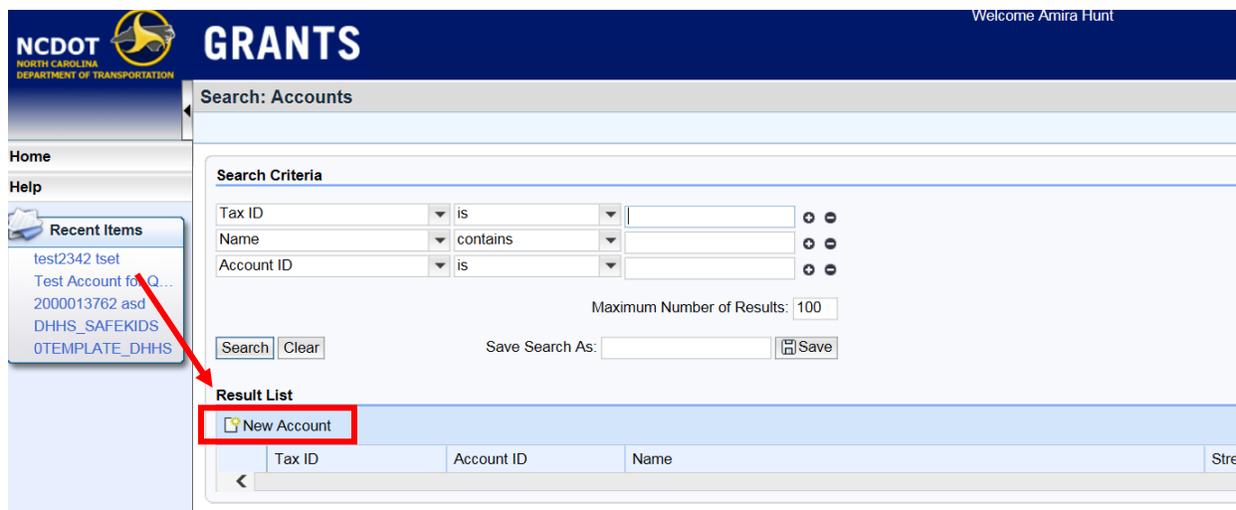
## Create Recipient Account

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.

The screenshot shows the 'Corporate Account: New' form. The 'Name 1' field is highlighted with a red box. A red arrow points from the 'Save' button area to the 'Name 1' field. The form includes sections for 'General Data' and 'Main Address and Communication Data'. The 'Name 1' field is currently empty.

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.

The screenshot shows the 'Corporate Account: New' form after the ID field has been populated with '200006857'. The ID field is highlighted with a red box, and a red arrow points to it. The 'Notes' section is also highlighted with a red box. The form includes sections for 'General Data' and 'Main Address and Communication Data'. The 'Name 1' field is now labeled 'Legal Name' and is highlighted with a red box. The 'Addresses' section at the bottom shows 'No result found'.

- 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.

The screenshot shows the 'GRANTS' system interface for creating a new corporate account. The 'General Data' section is highlighted with a red box, and a red arrow points to the 'Tax Number' field. The 'Main Address and Communication Data' section is also visible.

General Data	Main Address and Communication Data
ID: 2000006857	Street/House Number: <input type="text"/>
Name 1:* Legal Name	Zip Code/City: <input type="text"/>
Name 2: Legal Name 2	State: <input type="text"/>
Tax Number: 56-1234567	Country: <input type="text"/>
Duns Number: 0012456478	Phone/Extension: <input type="text"/>
Fiscal Month End: April	E-Mail: <input type="text"/>
Suspension Indicator: <input type="checkbox"/>	Website: <input type="text"/>
Suspension Reason: <input type="text"/>	

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

The screenshot shows the 'GRANTS' system interface for creating a new corporate account. The 'Main Address and Communication Data' section is highlighted with a red box, and a red arrow points to the 'Street/House Number' field. The 'General Data' section is also visible.

General Data	Main Address and Communication Data
ID: <input type="text"/>	Street/House Number: <input type="text"/>
Name 1:* <input type="text"/>	Zip Code/City: <input type="text"/>
Name 2: <input type="text"/>	State: <input type="text"/>
Tax Number: <input type="text"/>	Country: <input type="text"/>
Duns Number: <input type="text"/>	Phone/Extension: <input type="text"/>
Fiscal Month End: <input type="text"/>	E-Mail: <input type="text"/>
Suspension Indicator: <input type="checkbox"/>	Website: <input type="text"/>
Suspension Reason: <input type="text"/>	

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

Welcome Amira Hunt

Saved Searches 2017 Funding Year Go Advanced

Back

**Main Address and Communication Data**

Street/House Number:

Zip Code/City:

State:

Country:

Phone/Extension:

E-Mail:

Website:

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

Welcome Amira Hunt

Saved Searches 2017 Funding Year Go Advanced

Back

**Main Address and Communication Data**

Street/House Number:

Zip Code/City:

State:

Country:

Phone/Extension:

E-Mail:

Website:

Search Help -- Webpage Dialog

238 entries found

Country	Name
TN	Tunisia
TO	Tonga
TP	East Timor
TR	Turkey
TT	Trinidad, Tobago
TV	Tuvalu
TW	Taiwan
TZ	Tanzania
UA	Ukraine
UG	Uganda
UM	Minor Outl. Ins.
US	USA
UY	Uruguay
UZ	Uzbekistan
VA	Vatican City

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

Welcome Amira Hunt

Saved Searches 2017 Funding Year Go Advanced

Back

**Main Address and Communication Data**

Street/House Number: 111 11th Ave.

Zip Code/City: 27615 Raleigh

State:

Country: US USA

Phone/Extension:

E-Mail:

Website:

Another window will pop up with a list of states.

Saved Searches 2017 Funding Year Go Advanced

Back

**Main Address and Communication Data**

Street/House Number:

Zip Code/City:

Phone/Extension:

**59 entries found**

Description	Name	Region
Mississippi	USA	MS
Missouri	USA	MO
Montana	USA	MT
Nebraska	USA	NE
Nevada	USA	NV
New Hampshire	USA	NH
New Jersey	USA	NJ
New Mexico	USA	NM
New York	USA	NY
North Carolina	USA	NC
North Dakota	USA	ND
Northern Mariana Isl	USA	MP
Ohio	USA	OH
Oklahoma	USA	OK
Oregon	USA	OR

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

Street/House Number: 111 11th Ave.  
Zip Code/City: 27615 Raleigh  
State: NC North Carolina  
Country: US USA  
Phone/Extension:     
E-Mail:   
Website:

The 'Country' field is set to 'US' and 'USA'. A red arrow points to the 'Country' field. A red box highlights the selection icon (a small square with a right-pointing arrow) next to the 'Phone/Extension' field.

Street/House Number:   
Zip Code/City:   
State:   
Country:   
Phone/Extension:     
E-Mail:   
Website:

The 'Country' dropdown menu is open, showing a list of countries. A red arrow points to the 'US' entry in the list.

Country	Name
TO	Tonga
TP	East Timor
TR	Turkey
TT	Trinidad, Tobago
TV	Tuvalu
TW	Taiwan
TZ	Tanzania
UA	Ukraine
UG	Uganda
UM	Minor Outl. Ins.
US	USA
UY	Uruguay
UZ	Uzbekistan
VA	Vatican City
VC	St. Vincent
VE	Venezuela

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

The screenshot shows a web form titled "Main Address and Communication Data". At the top, there is a navigation bar with "Saved Searches", a dropdown menu set to "2017 Funding Year", and buttons for "Go", "Advanced", and a trash icon. Below this is a "Back" button and a search icon. The form fields are as follows:

Street/House Number:	111 11th Ave.		
Zip Code/City:	27615	Raleigh	
State:	NC	North Carolina	
Country:	US	USA	
Phone/Extension:	US	(919) 555-5555	x
E-Mail:			
Website:			

A red arrow points from the "Country" field to the "Phone/Extension" field. The phone number "(919) 555-5555" is highlighted with a red box.

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

The screenshot shows the same web form as above, but with the "E-Mail" and "Website" fields filled out. The "E-Mail" field contains "aa@aa.com" and the "Website" field contains "aa.com". Both fields are highlighted with a red box. A red arrow points from the "Country" field to the "Phone/Extension" field.

Street/House Number:	111 11th Ave.		
Zip Code/City:	27615	Raleigh	
State:	NC	North Carolina	
Country:	US	USA	
Phone/Extension:	US	(919) 555-5555	x
E-Mail:	aa@aa.com		
Website:	aa.com		

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

The screenshot shows the 'Corporate Account: New' form in the NCDOT GRANTS system. The form is divided into several sections: 'Account Details', 'General Data', and 'Main Address and Communication Data'. The 'Notes' section is highlighted with a red box. A red arrow points from the 'Recent Items' list on the left to the 'Notes' section.

Section	Field	Value	
General Data	ID	2000006857	
	Name 1*	Legal Name	
	Name 2	Legal Name 2	
	Tax Number	56-1234567	
	Duns Number	0012456478	
	Fiscal Month End	April	
	Suspension Indicator	<input type="checkbox"/>	
	Suspension Reason		
	Main Address and Communication Data		
	Street/House Number	123456 23th Ave.	
Zip Code/City	27615		
State	NC	North Carolina	
Country	US	USA	
Phone/Extension	751	1234567888	
E-Mail	aa@aa.com		
Website	aa.com		

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.

The screenshot shows the 'Corporate Account: New' form in the NCDOT GRANTS system. The 'Addresses' section is highlighted with a red box. A red arrow points from the 'Recent Items' list on the left to the 'Addresses' section.

Section	Field	Value	
General Data	ID	2000006864	
	Name 1*	name	
	Name 2		
	Tax Number		
	Duns Number		
	Fiscal Month End		
	Suspension Indicator	<input type="checkbox"/>	
	Suspension Reason		
	Main Address and Communication Data		
	Street/House Number	111 11th Ave.	
Zip Code/City	27615	Raleigh	
State	NC	North Carolina	
Country	US		
Phone/Extension	US	(919) 555-5555	
E-Mail	aa@aa.com		
Website	aa.com		

Section	Field	Value	
Addresses	Address	111 11th Ave. / Raleigh NC 27615	
	Phone/Ext.	+1 (919) 555-5555	
E-Mail			aa@aa.com

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.

The screenshot shows the 'Corporate Account: New - Addresses' form in the NCDOT GRANTS system. The form is divided into several sections: Address, Phone/Fax/Mobile Numbers, E-Mails, Web Sites, and Address Types. Each section has an 'Insert' button. A red box highlights the 'Insert' button in the Phone/Fax/Mobile Numbers section. Another red box highlights the 'Insert' button in the E-Mails section. A third red box highlights the 'Insert' button in the Web Sites section. A fourth red box highlights the 'Insert' button in the Address Types section. A red arrow points to the 'Back' button at the top left of the form area.

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

The screenshot shows the 'Corporate Account: New - Addresses' form in the NCDOT GRANTS system. The form is divided into several sections: Address, Phone/Fax/Mobile Numbers, E-Mails, Web Sites, and Address Types. A red box highlights the 'Back' button at the top left of the form area.

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

The screenshot shows the NCDOT GRANTS system interface. At the top, there is a navigation bar with the NCDOT logo, the word "GRANTS", and a user greeting "Welcome Amira Hunt". On the right side of the navigation bar, there are options for "Saved Searches", "2017 Funding Year", and "Go", along with an "Advanced" search icon. Below the navigation bar, the main content area is titled "Corporate Account: New". A red box highlights the "Save" button, and a red arrow points to it from the left. To the right of the "Save" button are "Cancel" and "New" buttons. Below the main title, there is a "Home" and "Help" sidebar on the left. The main content area is divided into two sections: "General Data" and "Main Address and Communication Data". The "General Data" section includes fields for ID (200006859), Name 1 (Legal Name), Name 2, Tax Number (56-1234567), Duns Number (1234567891), Fiscal Month End (October), Suspension Indicator, and Suspension Reason. The "Main Address and Communication Data" section includes fields for Street/House Number, Zip Code/City, State, Country, Phone/Extension, E-Mail, and Website. Below these sections is a "Notes" area with a text input field. At the bottom of the page, there is a "Addresses" section with a "New" button and "History Data" link, and a message "No result found".

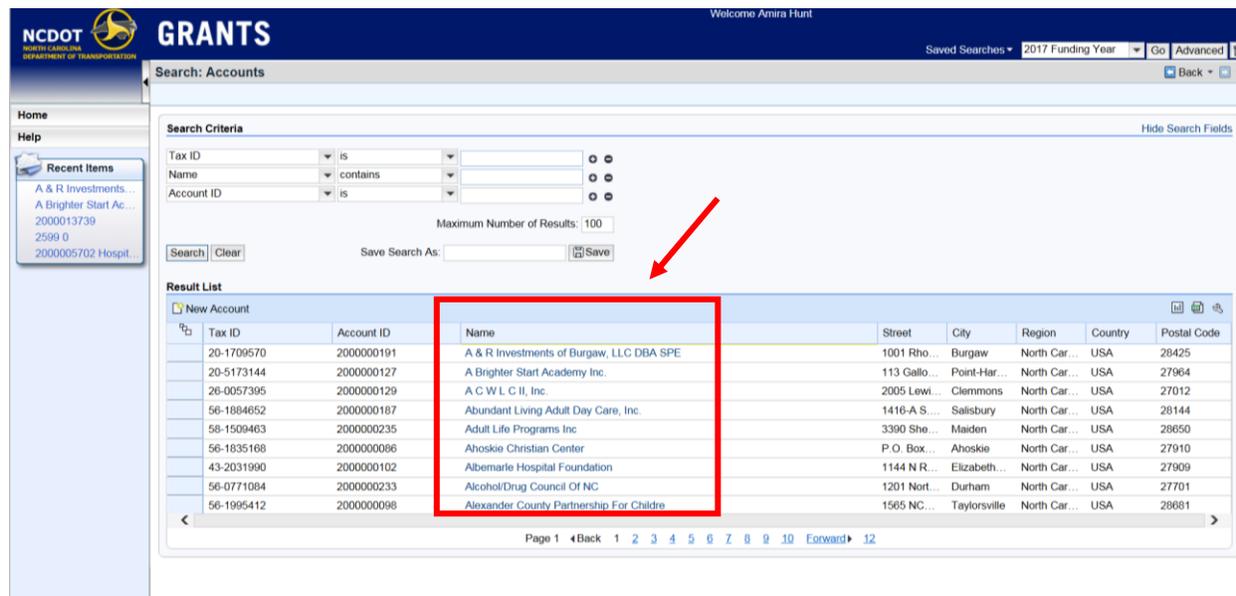
# Edit a Recipient Account

1. **Create/Edit Recipient Acct.** – To create or edit a recipient's 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.

The screenshot shows the NCDOT GRANTS interface. The header includes the NCDOT logo and 'GRANTS' text. The user is logged in as 'Amira Hunt'. The corporate account is 'Alexander County YMCA / Taylorsville NC 28681'. The 'Account Details' section is expanded, showing an 'Edit' icon. The 'General Data' section includes fields for ID (2000006618), Name 1 (Alexander County YMCA), Name 2, Tax Number (56-1036861), Duns Number, Fiscal Month End (December), Suspension Indicator, and Suspension Reason. The 'Main Address and Communication Data' section includes Street/House Number (260 Black Oak Ridge Road), Zip Code/City (28681 Taylorsville), State (NC North Carolina), Country (US), Phone/Extension (US), E-Mail, and Website. Below this is a 'Notes' section. At the bottom, there is an 'Addresses' table with columns for Actions, External number, Address, Phone/Ext., Mobile, and E-Mail. One address is listed with external number 10476 and address 260 Black Oak Ridge Road / Taylorsville...

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](mailto:Grants-OSBM@osbm.nc.gov) with IRS tax documentation of the changes. OSBM will make the changes in the system.

This screenshot is similar to the previous one but shows the 'Main Address and Communication Data' section and the 'Notes' section highlighted with a red box. The 'Main Address and Communication Data' section is a form with fields for Street/House Number (260 Black Oak Ridge Road), Zip Code/City (28681 Taylorsville), State (NC North Carolina), Country (US), Phone/Extension (US), E-Mail, and Website. The 'Notes' section is a large text area below the address information. A red arrow points to the 'Edit' icon in the 'Account Details' header.

- 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.

Corporate Account: Alexander County YMCA / Taylorsville NC 28681

Account Details

General Data

ID: 200000618  
 Name 1: Alexander County YMCA  
 Name 2:  
 Tax Number: 56-1036861  
 Duns Number:  
 Fiscal Month End: December  
 Suspension Indicator:  
 Suspension Reason:

Main Address and Communication Data

Street/House Number: 260 Black Oak Ridge Road  
 Zip Code/City: 28681 Taylorsville  
 State: NC North Carolina  
 Country: US  
 Phone/Extension: US  
 E-Mail:  
 Website:

Notes

Addresses

Actions	External number	Address	Phone/Ext.	Mobile	E-Mail
	10476	260 Black Oak Ridge Road / Taylorsville...			
		111 11th Street / Raleigh NC 27615	+1 (919)8888888		aa@nc.gov

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.

Corporate Account: Alexander County YMCA / Taylorsville NC 28681 - Addresses

Address

Street/House Number: 111 11th Street  
 Zip Code/City: 27615 Raleigh  
 State: NC North Carolina  
 Country: US USA

Phone/Fax/Mobile Numbers

Type	Country	Number	Extension	Standard
Telephone	US	9198888888		<input type="checkbox"/>

E-Mails

E-Mail	Standard
aa@nc.gov	<input type="checkbox"/>

Web Sites

Web Site	Standard
nc.gov	<input type="checkbox"/>

Address Types

Address Type	Standard
Billing Address	<input type="checkbox"/>

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

The screenshot shows the 'Addresses' page in the NCDOT GRANTS system. The page title is 'Corporate Account: Alexander County YMCA / Taylorsville NC 28681 - Addresses'. A red arrow points to a 'Back' button in the top navigation bar. The page contains several sections for entering contact information:

- Address:** Street/House Number: 111 11th Street, Zip Code/City: 27615 Raleigh, State: NC North Carolina, Country: US USA.
- Phone/Fax/Mobile Numbers:** A table with columns for Type, Country, Number, Extension, and Standard. One entry is shown: Telephone, US, 9196888888.
- E-Mails:** A table with columns for E-Mail and Standard. One entry is shown: aa@nc.gov.
- Web Sites:** A table with columns for Web Site and Standard. One entry is shown: nc.gov.
- Address Types:** A table with columns for Address Type and Standard. One entry is shown: Billing Address.

Click on save on the main screen.

The screenshot shows the 'Account Details' page in the NCDOT GRANTS system. The page title is 'Corporate Account: Alexander County YMCA / Taylorsville NC 28681'. A red arrow points to a 'Save' button in the top navigation bar. The page contains several sections for entering account information:

- General Data:** ID: 2000006618, Name 1: Alexander County YMCA, Name 2: Alexander County YMCA, Tax Number: 56-1036861, Duns Number: , Fiscal Month End: December, Suspension Indicator: , Suspension Reason: .
- Main Address and Communication Data:** Street/House Number: 260 Black Oak Ridge Road, Zip Code/City: 28681 Taylorsville, State: NC North Carolina, Country: US USA, Phone/Extension: US, E-Mail: , Website: .
- Notes:** A text area for entering notes.
- Addresses:** A table with columns for Actions, External number, Address, Phone/Ext., Mobile, and E-Mail. Two entries are shown: 10476, 260 Black Oak Ridge Road / Taylorsville..., +1 (919)6888888, aa@nc.gov.