Grants Portal Reference

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Grant Portal Reference

Grants Portal as It Pertains to Public Assistance

Recipient: *Tennessee Emergency Management Agency. The recipient, or pass-through entity, is a state or Indian tribal government that provides a subaward to a subrecipient to carry out an activity under the PA Program.*

Applicant: *a non-Federal entity (government, other legal entity, or certain private non-profit organization) that receives a subaward from a pass-through entity to carry out, and be accountable for, an activity under the PA program. Also referred to as subgrantee or subrecipient.*

The Recipient and the Applicant can use the Grants Portal to complete a wide range of tasks during the Public Assistance process, such as:

- Set up and manage organizational details
    - Add personnel
    - Upload documents
    - Assign staff
    - Collect and receive information from FEMA
    - Submit supporting documentation in one consolidated location
- Submit and manage Requests for Public Assistance
- Review the Damage Description and Dimensions
- Scope and cost a project
- Monitor project status
- Review and approve projects

Administrative Management of Grants Portal

FEMA provides an easy three-step process for the Recipient and Applicants to obtain access to the Grants Portal.

1. FEMA grants access to the Recipient
2. The Recipient grants access to the Applicant
3. The Recipient and Applicant manage their personnel

Overview, Goal, and Objectives

Welcome to the FEMA Grants Portal - Transparency at Every Step guide. This guide will provide in-depth training to Recipients and Applicants to bring clarity to the Public Assistance process, specifically regarding the use of the Public Assistance Grants Portal. The course will cover all information needed to substantiate a project in Grants Portal, including the documentation required for each phase of the Public Assistance process. By the end of the guide, State, Local, Tribal, and Territorial Recipients and Applicants will be able to use Grants Portal as it pertains to the Public Assistance Program.

Upon completion of this guide, participants will be able to:

- Demonstrate the benefits of transparency by using Grants Portal
- Explain how the Recipient and the Applicant can use Grants Portal to review and manage projects throughout their life cycle
- Describe the user-friendly approach to navigating Grants Portal

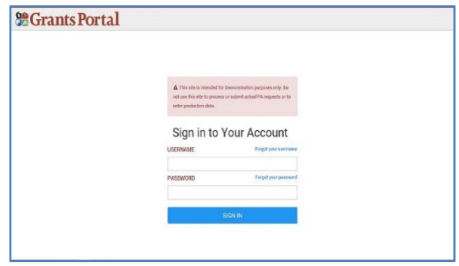
Chapter 1

This chapter provides an overview of administrative requirements, goal and objectives, and provides an overview of the management and coordination capabilities of Grants Portal.

Upon completion of this chapter, participants will be able to:

- Identify administrative requirements of the guide
- State the goals and objectives of the guide
- Describe the Grants Portal capabilities and benefits

Grants Portal



FEMA developed the Grants Portal to streamline the Public Assistance process and facilitate collaboration between FEMA, Recipient, and the Applicant. The system benefits the Recipient and the Applicant in the following ways:

- Facilitates full project visibility
  - Sign in to their account and view their project status during the Public Assistance process
- Enhances coordination and communication
  - Communicate with and set up meetings with their Program Delivery Manager via Grants Portal
- Streamlines work
  - Upload all work and documentation related to the Applicant's project into Grants Portal. It also sends automatic notifications when there are tasks to complete
- Improves document collection and retention
  - Upload pertinent documentation and store it in the system for future use. These can be updated at any time

Grants Portal as It Pertains to Public Assistance

The Recipient and the Applicant can use the Grants Portal to complete a wide range of tasks during the Public Assistance process, such as:

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  - Upload documents
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Administrative Management of Grants Portal

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2. The Recipient grants access to the Applicant
3. The Recipient and Applicant manage their personnel

Support Hotline for Grants Portal

The Grants Portal also has a support hotline, which can be reached at 1-866-337-8448. A Recipient or Applicant should use this if they have any questions about Grants Portal.

Chapter 2

This chapter provides an overview of the capabilities of the Grants Portal and covers the necessary information to establish and manage profile accounts. This chapter also describes information management in the Grants Portal including receiving notifications and uploading required documentation.

Upon completion of this chapter, participants will be able to:

- Describe various procedures for profile account initiation within Grants Portal
- Review best practices for account management within Grants Portal

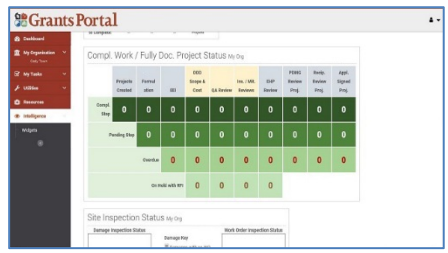
Technical Capabilities of Grants Portal

Grants Portal is a web-based project tracking system used by FEMA and its stakeholders. Grants Portal acts as a collection and retention center for documentation required by FEMA for an Applicant to obtain grant funding.

Grants Portal:

- Facilitates full project visibility
- Enhances coordination and communication
- Streamlines work
- Improves document collection and retention

FEMA recommends Recipients and Applicants use the Internet browser Mozilla Firefox to fully utilize all technical capabilities and to ensure optimal performance of Grants Portal.



Full Project Visibility

Within Grants Portal, both Recipient and Applicant can view the status of projects. Grants Portal shows if FEMA is reviewing the project, if FEMA ordered a site inspection, and if FEMA obligated or denied a project.

Coordination and Communication

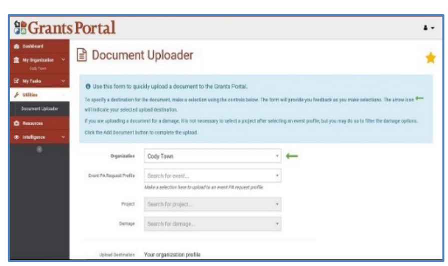
Grants Portal allows FEMA, Recipient, and Applicant to communicate and coordinate with one another on all tasks related to the Applicant's project. Some examples are as follows:

- The Program Delivery Manager creates and sends calendar updates for meetings, such as the Recovery Scoping Meeting, via Grants Portal
- The Program Delivery Manager submits Essential Elements of Information and Requests for Information via Grants Portal
- The system notifies the Applicant of the new tasks through the notification bell

Streamlined Work

Grants Portal streamlines work and provides a central location in which all participating parties carry out their tasks. These capabilities include:

- Setting up and managing organizational details in advance of an event
  - Adding personnel
  - Uploading insurance documents
  - Assigning staff
  - Collecting and receiving information from FEMA
  - Submitting supporting documentation in one consolidated location
- Submitting and managing Requests for Public Assistance
- Reviewing and signing the Damage Description and Dimensions
- Scoping and costing a project
- Reviewing and signing the scope of work and cost estimate
- Monitoring a project's status
- Reviewing and approving submitted grants



Documentation Collection and Retention

Applicants can also upload and store documentation in the system at any time before a disaster is declared. When an event occurs and they have an approved Request for Public Assistance, then the Applicant receives an Event Profile and can upload information that pertains to that event.

Documentation may include:

- Payroll policies
- Insurance policies
- Mutual Aid agreements, if applicable
- Purchasing/procurement policies

Obtaining Access to Grants Portal

As discussed in the previous chapter, FEMA provides an easy three-step process for Recipient and Applicants to obtain access to Grants Portal and create an organization account:

1. FEMA grants access to the Recipient
2. Recipient grants access to the Applicant
3. Recipient and Applicant manages their personnel

Grants Portal Organization Account

The organization account is a central location where Public Assistance processes are documented and monitored, as well as a tool that FEMA, Recipient, and Applicant can use to interact with each other. This centralized workspace greatly facilitates the Public Assistance process.

The first step to set up an organization account for both the Recipient and Applicant occurs after FEMA and the Recipient have their initial meeting. This occurs at the beginning of an incident for Recipients and Applicants who have not already created an account in Grants Portal or who have not received an invite during a non-event.

Once FEMA has established the Recipient account, the Recipient will send the Applicant an invitation via Grants Portal that will send an email:

- The Applicant should regularly check their email they provided to the Recipient

The Applicant should:

- Open the email that was generated from Grants Portal with the email address of support@pagrants.fema.gov
- Read the email thoroughly
- Select the link in the text to begin creating an organization account

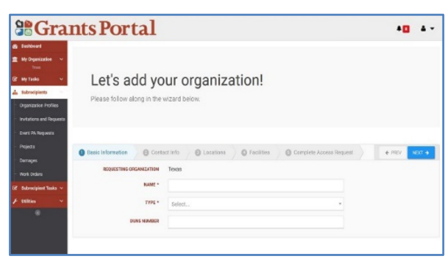
To create and submit an organization account request, an Applicant must provide the following information in Grants Portal:

- Organization information
- Contact information
- Location information
- Applicable counties

Obtaining Access to Grants Portal

FEMA to Recipient

Recipients receive initial access to Grants Portal once an event occurs.



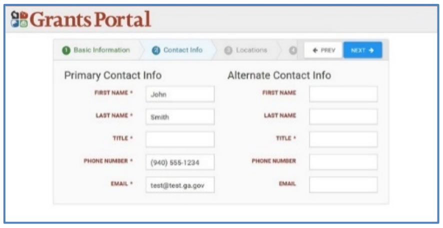
Once the Recipient selects the link in their email, the hyperlink brings them to the Grants Portal site to register their organization. The first screen asks for the Recipient to input their basic information.

Directions for inputting basic information:

- Ensure the requesting organization is correct
- Input the organization name (e.g., Georgia Emergency Management Agency)
- Select the type of organization represented (e.g., State government, U.S. Territory or possession, or Native American Tribal government)
- Enter the organization Dun and Bradstreet (DUNS) number

- Select the "Next" button to move onto the next screen when ready

Recipient to Applicant



Agencies, private nonprofits, and other organizations who incurred costs or damages related to the incident attend the Applicant Briefing, led by the Recipient.

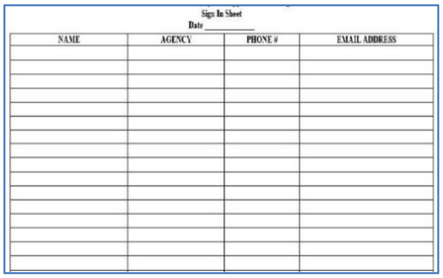
The Recipient is responsible for collecting the Applicant's name, agency name, phone number, and email address on a sign-in sheet.

The Recipient then uses their rights granted by FEMA to invite or directly enter Applicants into Grants Portal. Applicants should regularly check the email for the invitation or notification to join Grants Portal.

Once the Applicant selects the link in their email, the hyperlink brings them to the Grants Portal site to register their organization. The first screen asks the Applicant to input their basic information.

Directions for inputting basic information:

- Ensure the requesting organization is correct
- Input the organization name (e.g., Dallas, City of)
- Select the type of organization represented (e.g., City, County, Private Nonprofit)
- Enter the organization DUNS number
- Select the "Next" button to move onto the next screen when ready


Sign In Sheet
Date

NAME	AGENCY	PHONE #	EMAIL ADDRESS

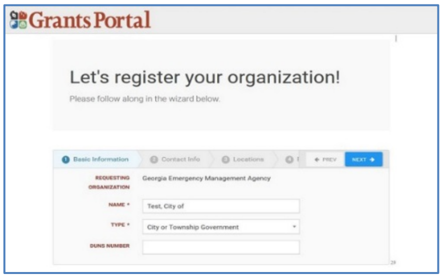
After Applicants create an account, the Recipient must approve it. Grants Portal sends an organization account request email to Recipients that informs them that a request was added to their workflow.

Note: The process by which the Recipient Invites Applicants to join Grants Portal will be discussed later in this chapter.

Grants Portal Organization Account

Contact Information

Once the Applicant selects the "Next" button on the screen asking for basic information, a new screen loads asking for the organizations primary contact information.



Directions to enter primary contact information:

- Enter first name
- Enter last name
- Enter title
- Enter phone number
- Enter primary email
- Either select the "Next" button to move onto the next screen when ready, or enter information for an alternate contact

The contact information section also allows the Applicant to input information for an alternate contact. The alternate contact should be someone who can act as the primary contact if the primary contact is unavailable.

Directions to enter alternate contact information:

- Enter first name
- Enter last name
- Enter title
- Enter phone number
- Enter email
- Select the "Next" button to move onto the next screen when ready

Organization Location

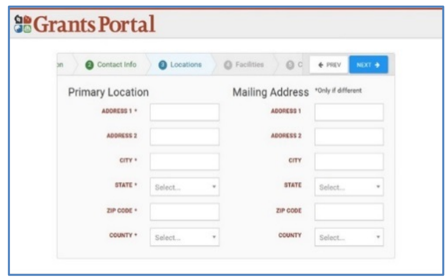
Grants Portal directs the Applicant to the organization location screen once they select the "Next" button on the contact information screen.

The Applicant enters the primary location address of their organization. The Applicant also inputs their mailing address, but only if it differs from the primary location address (e.g., An Applicant who has a P.O. Box should provide this information as their mailing address).

Directions to enter primary location of your organization:

- Enter address 1 of the organization's location (e.g., 500 C Street SW)
- Enter address 2 of the organization's location, as needed (e.g., Suite 400)
- Enter the city in which the organization resides
- Enter the state in which the city is located
- Enter the zip code of the organization's location
- Enter the county of the organization's location
- Either select the "Next" button to move onto the next screen when ready, or enter information for a mailing address, as needed

If an Applicant's organization has a different mailing address than the primary address of the organization, they also input the mailing address.

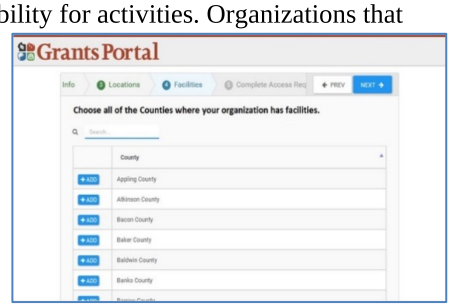


Directions to enter the organization's mailing:

- Enter the organization's address 1 of where it receives mail (e.g., P.O. Box 45)
- Enter the organization's address 2 of where it receives mail, as needed (e.g., 500 C Street SW)
- Enter the city in which the organization resides
- Enter the state in which the city is located
- Enter the zip code of the organization's location
- Enter the county of the organization's location
- Select the "Next" button to move onto the next screen when ready

Facilities Location

Once the Applicant selects the "Next" button, Grants Portal takes them to the facilities location section. Here, the Applicant adds the county location of their facilities or counties in which they have responsibility for activities. Organizations that have Statewide responsibilities have different steps to take than organizations that have facilities or responsibility for activities in a limited number of counties.



Directions for organizations who have statewide responsibilities:

- Select the "Mark Statewide" button
- Select the "Next" button to move onto the next screen when ready

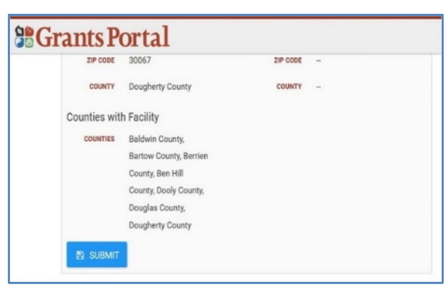
Directions for organizations that have facilities or responsibility for activities in a limited number of counties:

- Select the "Add" button next to the counties the organization has either facilities in or responsibility for activities
- Select the "Next" button to move onto the next screen when ready

Complete Access Request

When selecting the "Next" button, Grants Portal loads a page that completes the access request. The Applicant reviews the information on the page to make sure it is correct.

To review organization information:



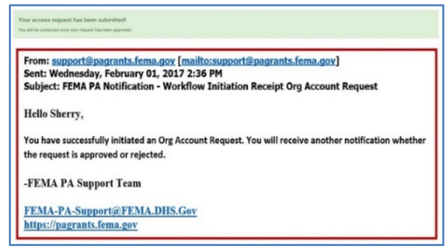
- Read the information provided on the screen and ensure it is all correct
- If any information is incorrect, use the "Previous" button to go back to the section which needs editing
- Select the "Submit" button at the bottom of the webpage

Completion

Once the Applicant selects the "Submit" button, a congratulations screen appears. The Applicant has completed their organization account.

Recipients:

- Upon completion, Grants Portal sends a message and task to FEMA personnel, indicating that the Recipient completed their organization account
- Grants Portal immediately sends an email to the Recipient that states they successfully initiated an organization account request
- FEMA then reviews the organization account request, approves it, and Grants Portal sends the Recipient an email which prompts them to add additional personnel.


Your access request has been submitted!
You will be contacted once your request has been approved.

From: support@pagrants.fema.gov [mailto:support@pagrants.fema.gov]
Sent: Wednesday, February 01, 2017 2:36 PM
Subject: FEMA PA Notification - Workflow Initiation Receipt Org Account Request

Hello Sherry,

You have successfully initiated an Org Account Request. You will receive another notification whether the request is approved or rejected.

-FEMA PA Support Team

FEMA-PA-Support@FEMA.DHS.Gov
https://pagrants.fema.gov

Applicants:

- Upon completion, Grants Portal sends a message and task to the Recipient, indicating that the Applicant completed their organization account
- Grants Portal immediately sends an email to the Applicant that states they successfully initiated an organization account request
- The Recipient reviews the organization account request and approves it
- Grants Portal sends another email to the Applicant prompting them to create their account and add personnel

Grants Portal Account Activation

Once an organization account is successfully created, the Applicant will be able to create individual user accounts. The individual user accounts are the entry point where most of the work is conducted. Grants Portal will send emails containing log in information to each new user, where they will need to follow the instructions to log into the system.

The subsequent outline the activation process.

Activating a Grants Portal Account

Activation Email

The next step in acquiring access to Grants Portal is setting up a personal Grants Portal account.


From: support@pagrants.fema.gov [mailto:support@pagrants.fema.gov]
Sent: Thursday, November 23, 2017 3:11 PM
Subject: FEMA PA Notification – Org Account Request Approved

Hello Sherry,

Your organization account request has received final approval. You may now log in to the Grants Portal with the temporary username and password:

Username: comanager@subrecipientcountyga.com
Password: LJE1kAvc!%

Please click https://pagrants.fema.gov to sign in with your temporary password. You will be required to change your password upon login.

-FEMA PA Support Team

FEMA-PA-Support@FEMA.DHS.Gov
https://pagrants.fema.gov

Recipients:

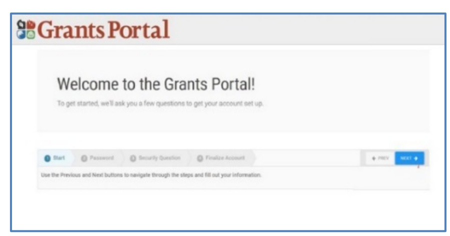
Recipient personnel will receive an email with a username and temporary password which they use to log in to Grants Portal.

Applicants:

Upon obtaining Recipient approval for the organization account, individual users receive an email with a username and temporary password which they use to log in to Grants Portal.

Directions to activate Grants Portal account:

- Open the email from FEMA
- Review the email and take note of the username and temporary password
- Select the link that says to sign in with the temporary password.

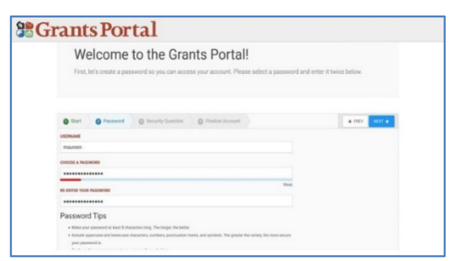


Welcome Screen

When the individual user selects the link in their email, it brings them to Grants Portal to set up their account.

Directions to activate a Grants Portal account:

- Read the screen that welcomes the user
- Select the "Next" button to move to the next screen when ready



Choosing a Password

After the individual user selects the "Next" button, Grants Portal directs them to a screen that allows them to set up the password for their account.

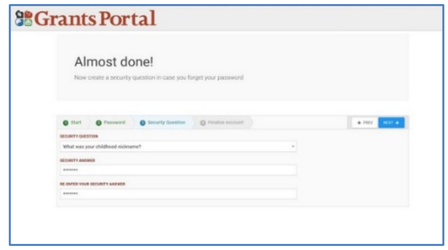
Directions to create a password:

- Ensure the username is correct
- Choose and enter a password
    - The password must be at least eight characters long

- The password may include uppercase and lowercase characters, numbers, punctuation marks, and symbols

- Re-enter the password to confirm it
- Select the "Next" button to move to the next screen when ready

Selecting a Security Question

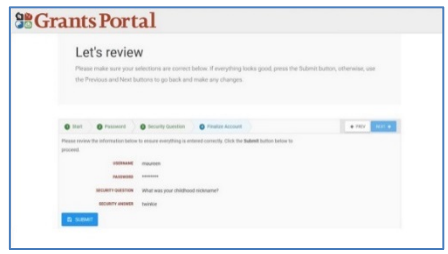


Selecting the "Next" button brings the individual user to a screen that asks the individual user to select a security question and answer.

Directions for setting a security question and answer:

- Select a security question (e.g., What is your oldest sibling's middle name?)
- Enter a personal answer to the question
- Re-enter the security answer to confirm it
- Select the "Next" button

Review Screen



After the individual user selects the "Next" button they review the information provided to activate their Grants Portal account.

Directions to review activation information:

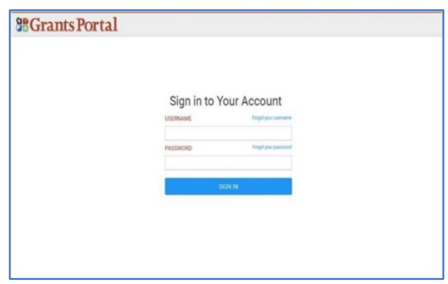
- Review the username
- Ensure that the password is correct
- Review the security question

Ensure the security question answer is correct

Congratulations Screen

Selecting the "Next" button brings the individual user to the final activation screen. This screen congratulates the individual user for activating their account. The individual user now has access to Grants Portal.

Logging in to Grants Portal



Once a Recipient or Applicant sets up their organization account and completes their personal account, they can sign in to Grants Portal.

Directions to sign in to Grants Portal:

- Open an Internet browser
- Select the Internet browser's address bar and type in the Grants Portal website.
- Type in the individual user username
- Type in the individual user password
- Select the "Sign In" button

Privacy Notice Pop-Up

After selecting the "Sign In" button, a pop-up window with a privacy notice window will appear. The privacy notice informs the individual user that FEMA collects the information in Grants Portal for grants purposes.

Directions to access Grants Portal:

- Read the privacy notice
- Select the "Accept" button

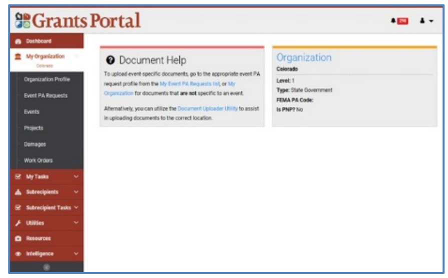
Attention Pop-Up

After selecting the "Accept" button, a pop-up window with an attention notice will appear. The attention notice informs the individual user that they are accessing a United States Government information system.

Directions to access Grants Portal:

- Read the attention notice
- Select the "Accept" button

Grants Portal Dashboard



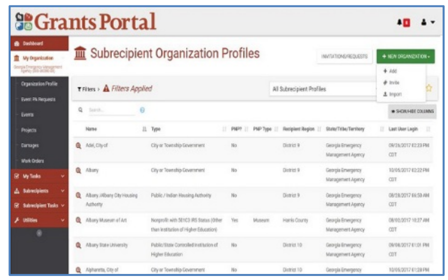
After the account setup process is complete, the individual user will be taken to the Grants Portal Dashboard. This is the main screen where the individual user will be able to navigate to other parts of Grants Portal.

It is important to note that the Dashboard is completely customizable depending on the user's preference. There will be more information on customizing the Grants Portal Dashboard in a later chapter of this guide.

Recipient (TEMA) Provides Access to Applicant

After an incident occurs and the President declares an emergency or major disaster, TEMA will request Applicants submit a Designation of Applicant Agent form. The form is collected prior to, during, or after the Applicant Briefing. They then use the information to invite the designated individuals to create organization accounts and personnel accounts in Grants Portal.

TEMA Directions to invite an Applicant to the Grants Portal:

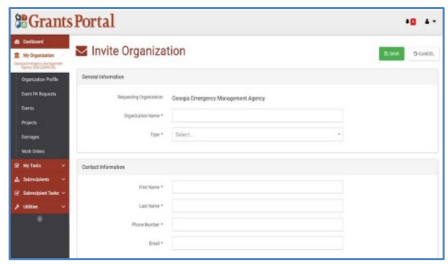


- Select the "My Organization" tab on the left side of the dashboard
- Select the "Organization Profile" under the "My Organization" tab
- Select the "Manage" button to the right of the subrecipient organization profiles drop-down list

  After the Recipient selects the "Manage" button, the "Subrecipient Organization Profiles" page loads.

- Select the "New Organization" button
- Select "Invite" from the drop-down list

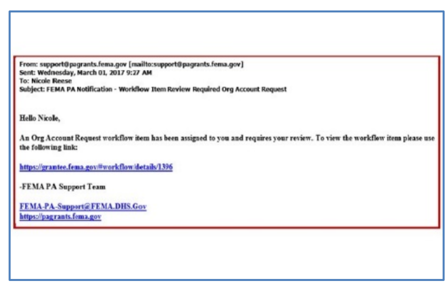
  After the Recipient selects "Invite" in the drop-down list, Grants Portal directs them to the "Invite Organization" page.



- Review the requesting organization to ensure the Recipient's organization is inviting the Applicant
- Select the text box next to "Organization Name" and input the Applicant's organization
- Select the drop-down list next to "Type" and choose the appropriate type of organization to represent the Applicant
- Select the text box next to "First Name" and enter the contact's first name (i.e., this should be the Applicant’s Agent or Primary Point-of-Contact)
- Select the text box next to "Last Name" and enter the contact's last name
- Select the text box next to "Phone Number" and enter the contact's phone number
- Select the text box next to "Email" and enter the contact's email
- Select the "Save" button in the top-right corner of Grants Portal once done entering information

  After saving the invitation, Grants Portal automatically sends an email invitation to the Applicant. Grants Portal also loads the "Organization Invitation" page for the Recipient to review the information input for the Applicant.

- Review to ensure all information is correct



From: support@pagrants.fema.gov [mailto:support@pagrants.fema.gov]
Sent: Wednesday, March 01, 2017 9:27 AM
To: Nicole Reese
Subject: FEMA PA Notification - Workflow Item Review Required Org Account Request

Hello Nicole,

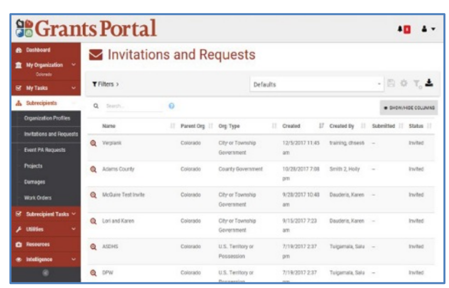
An Org Account Request workflow item has been assigned to you and requires your review. To view the workflow item please use the following link:

https://grantee.fema.gov/#workflow/details/1396

-FEMA PA Support Team

FEMA-PA-Support@FEMA.DHS.Gov
https://pagrants.fema.gov

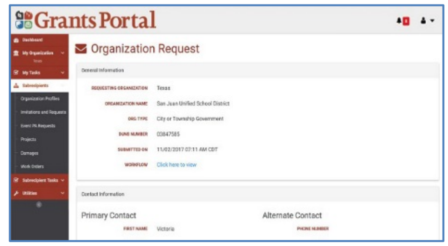
Reviewing the Applicant's Organization Account Request



After the Applicant completes the organization account request, Grants Portal notifies the Recipient (TEMA) that they have an organization account request task to complete in Grants Portal.

- Read the email
- Select the link in the email to go to Grants Portal
- Sign in to Grants Portal
- Select the "Subrecipients" tab on the left side of Grants Portal
- Select the "Invitations and Requests" tab located under "Subrecipients"

- Select the magnifying glass next to the name of the organization for the organization account you want to review

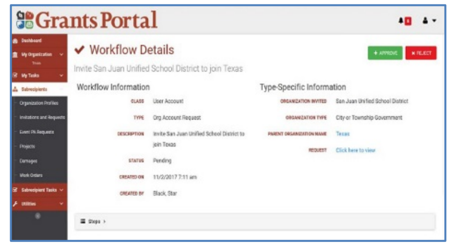


  Grants Portal loads the "Organization Request" page once the Recipient selects the magnifying glass. Here, the Recipient reviews an organization's information and navigates to the organization's workflow.

- Review the organization's information
- Select the link next to "Workflow"

  After the Recipient selects the link next to "Workflow," Grants Portal directs the Recipient to the "Workflow Details" page. The Recipient approves or rejects the organization account request at this time.

- Review the workflow information and type-specific information on the screen



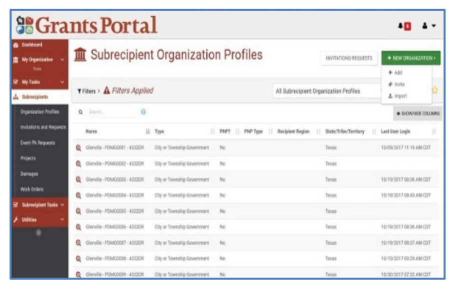
- Select the "Approve" button at the top right of the screen if the organization account is approved
- Select the "Reject" button at the top right of the screen if the organization account is not approved

  Once the Recipient either chooses to accept or reject the organization account request, a pop-up window appears asking if the Recipient is sure of their determination.

- Select the "Yes" button in the pop-up window

Once the Recipient approves the Applicant's organization account, Grants Portal sends the Applicant an email with a username and temporary password to set up their personal account.

Creating an Organization Profile for the Applicant



A second way for the Recipient (TEMA) to invite an Applicant to the Grants Portal is by creating an organization account for them. This typically occurs if the Applicant does not have access to the internet or cannot complete the organization account for another reason.

- Select the "My Tasks" tab on the left side of the screen
- Select the "Subrecipients" tab under "My Tasks"
- Select the "Organization Profiles" tab under "Subrecipients"
- Select the "New Organization" button in the top-right corner of Grants Portal

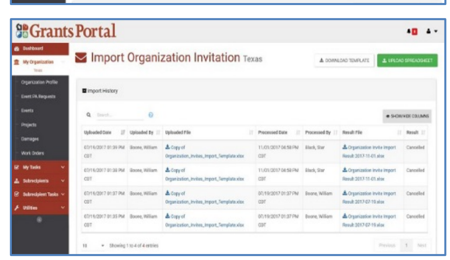
  After the Recipient completes the organization account, the Applicant receives an email which states that the Recipient approved their organization account and provides them with a username and temporary password.

Inviting Multiple Applicant Organizations

Recipients have a third option to invite Applicants to join Grants Portal. This option is helpful when a Recipient wants to invite multiple Applicants at once.

This most often occurs after the Applicant Briefing. A Recipient has numerous organizations to invite once they collect information on the sign-in sheet at the briefing.

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the Subrecipient organization profiles drop-down list

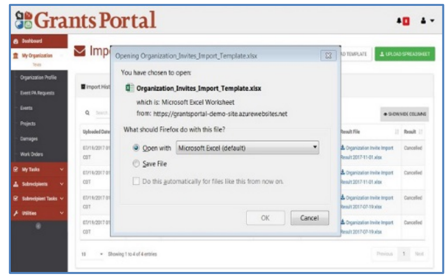


- Select the "New Organization" button in the top-right corner of Grants Portal
- Select "Import" from the drop-down list

  Once the Recipient selects "Import" in the drop-down list, Grants Portal directs them to the "Import Organization Invitation" page. The Recipient downloads the invitation template and uploads it to Grants Portal.

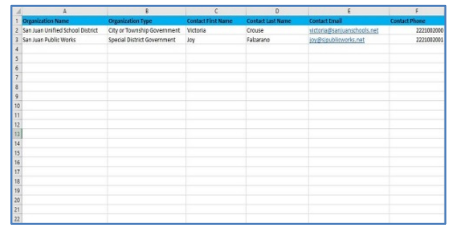
- Select the "Download Template" button in the top-right corner of Grants Portal

A pop-up window appears once the Recipient selects the "Download Template" button asking the Recipient to open the spreadsheet which holds the template.



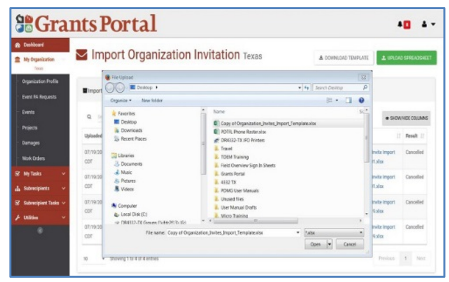
- Select the "OK" button in the pop-up window

The template opens in Microsoft Excel once the Recipient selects "OK" in the pop-up window. The Recipient enables editing of the document before they populate the spreadsheet. The Recipient then inputs the following information into the template for the multiple organizations they want to invite to Grants Portal:



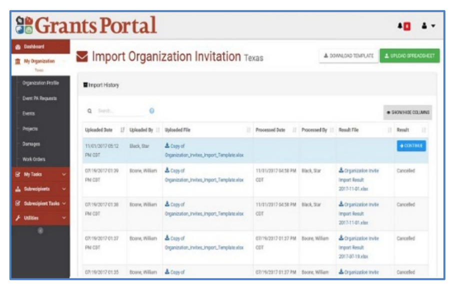
- Organization name
- Organization type
- Contact's first name
- Contact's last name
- Contact's email
- Contact's phone number
- Select the "Enable Editing" button in the task bar
- Enter the appropriate information for all organizations to be invited to Grants Portal
- Save the template as a file that can be uploaded later
- Exit out of the file

After completing and saving the organization invitation template, the Recipient navigates back into Grants Portal to the "Import Organization Invitation" page.



- Navigate to the "Import Organization Invitation" page in Grants Portal
- Select the "Upload Spreadsheet" in the top-right corner of Grants Portal

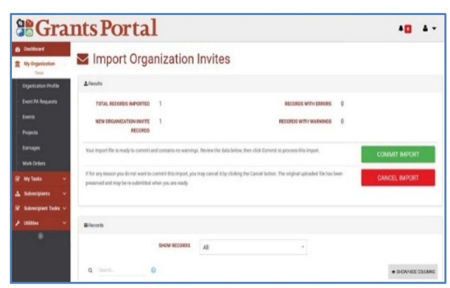
The File Explorer window then pops up. The Recipient navigates their files to find the saved file. The completed template can now be uploaded into Grants Portal.



- Navigate File Explorer to find the saved completed template
- Select the file that holds the organizations' information.
- Select the "Open" button

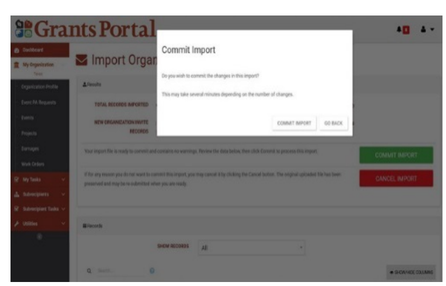
After the Recipient selects the "Open" button, a row appears under "Import History" in the "Import Organization" page. The row is highlighted in blue. The Recipient continues the process to upload the information from the document into Grants Portal.

- Look for the blue highlighted row on the screen for the file uploaded into Grants Portal. It is the top row
- Select the "Continue" button in the row on the right-side of Grants Portal



When the Recipient selects the "Continue" button, Grants Portal populates with the organization information from the uploaded spreadsheet. Grants Portal runs a scan for misinformation in the spreadsheet. The system then notifies the Recipient of the following information:

- Total records imported
- New organization invite records
- Records with errors
- Records with warnings
- Review the information provided by Grants Portal to identify if any errors or warnings exist in the spreadsheet
- Select the "Cancel Import" button if errors or warnings exist in the spreadsheet (note: review the organization information in the spreadsheet for any errors and then repeat the process of uploading the spreadsheet)
- Select the "Commit Import" button if no errors or warnings exist



After the Recipient selects the "Commit Import" button, a pop-up window appears asking if the Recipient is sure they want to import the file.

- Review the pop-up window information

- Select the "Commit Import" button on the pop-up window

  Once the Recipient imports the spreadsheet, Grants Portal will send an email to all of the organizations requesting they set up an organization account.

Editing Your Organization Information: Both Applicants and Recipients

Organization Account

The following will explain how to manage different parts of the organization account such as:

- Setting up and editing your Organization Profile
- Editing and managing locations
- Uploading pertinent documentation to Grants Portal

Familiarity with the features of Grants Portal is important for the Recipient and Applicant before starting the Request for Public Assistance and other items later in the grant application process.

Organization Profile

Recipients (TEMA) and Applicants who have a Grants Portal account have the option to set up and edit their organization profile. From the organization profile, the Recipient and Applicant can manage which of their personnel have access to Grants Portal. These personnel should be trusted and have in-depth knowledge of the damages caused by the event.

- Select the "My Profile" tab on the left side of the Grants Portal screen
- Select the "Organization Profile" tab on the left side of the Grants Portal screen

  Once a Recipient or Applicant selects the "Organization Profile" tab, Grants Portal directs them to their "My Organization Profile." Here, a Recipient or an Applicant sets up and edits anything they need including:

- General information
  - "State/Tribe/Territory" designation (e.g., Colorado)
  - "Level 2" designation (e.g., Fort Collins) - only in Applicant Grants Portal account
  - "Type" designation (e.g., city or township government, State government)
  - "Is Active" designation
  - "FEMA PA Code" designation
  - "DUNS Number"
- Recipient Regions - only in Recipient Grants Portal account
- Subrecipient Organization Profiles - only in Recipient Grants Portal account
- Personnel
- Locations
- Counties with Facility
- Insurance Profile
- Applicant Event Profiles
- Documents
- Events - Note that if the Applicant has been in multiple events, those will be listed here. However, the Applicant cannot edit this section.

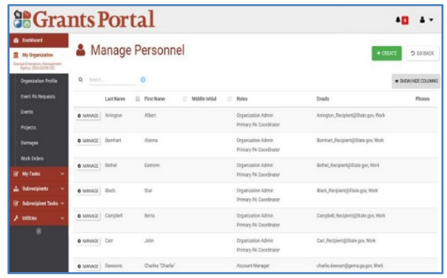
Adding Personnel User Accounts

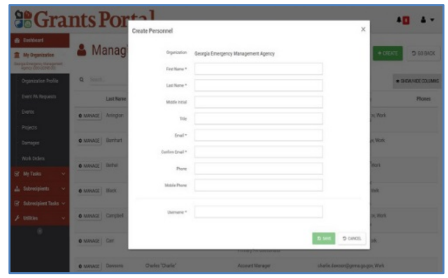
Another function of Grants Portal is that Recipients and Applicants can add personnel user accounts so that multiple people have access to the system from their organization. To add personnel user accounts:

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" on the left side of the Grants Portal
- Select the "Manage" button located to the right of the Personnel drop-down list

  After the Recipient or Applicant selects the "Manage" button, Grants Portal directs them to the "Manage Personnel" page. This page displays all personnel user accounts linked to their organization.

- Select the "Create" button in the top-right corner of Grants Portal





A pop-up window requesting the Recipient or Applicant to input the new personnel user account information appears.

- Select the text box next to "First Name" and input the person's first name
- Select the text box next to "Last Name" and input the person's last name
- Select the text box next to "Middle Initial" and input the person's middle initial
- Select the text box next to "Title" and input the person's title
- Select the text box next to "Email" and input the person's email
- Select the text box next to "Confirm Email" and re-enter the person's email
- Select the text box next to "Phone" and enter the person's phone number
- Select the text box next to "Mobile Phone" and enter the person's mobile phone number
- Select the text box next to "username" and enter the person's username
- Select the "Save" button once you enter all information

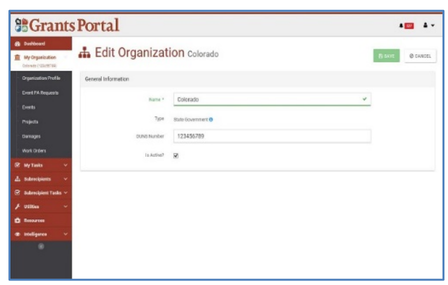
General Information

If a Recipient or Applicant in charge of their organization profile needs to change the general information of their organization, they do so in the "My Organization Profile" section of Grants Portal.

- Select the "Edit" button in the top-right corner of the screen

  After the Recipient or Applicant selects the "Edit" button, Grants Portal directs them to the "Edit Organization" page. On this page, the Recipient or Applicant edits the:

- "Name" designation (e.g., Colorado, Fort Collins)
- "Type" designation (e.g., State government, city or township government)
- "DUNS Number"
- "Active" designation
- To edit the "Name" designation:
  - Select the text box next to "Name"
  - Type in your new organization's name
- To edit the "Type" designation:
  - Select the drop-down list next to "Type"
  - Select the type of entity your organization is

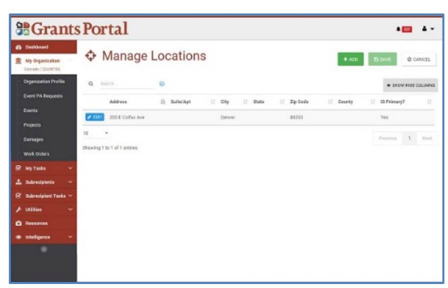


- To edit the "DUNS Number":
  - Select the text box next to "DUNS Number"
  - Enter your organization's DUNS Number
- To edit your "Active" designation:
  - Check or uncheck the checkbox next to "Active"
  - Select the "Save" button to save all edits. Once the Recipient or the Applicant selects the "Save" button, Grants Portal immediately directs them to the "My Organization Page."

Editing Your Organization Profile

Manage Locations

Another option the Recipient or Applicant has on the "My Organization Profile" page is to edit the locations of their facility.

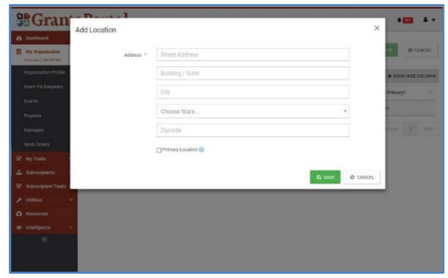


- Select the "Manage" button opposite the location drop-down list

  After the Recipient or Applicant selects the "Manage" button, Grants Portal redirects them to the "Manage Locations" page. Here, the Recipient or Applicant edits or adds organization locations.

- Select the "Edit" button next to the address of the location you want to edit
- Select the "Add" button in the top-right corner of the screen

  Once the Recipient or Applicant selects the "Edit" button next to their *location address or the "Add" button in the top-right corner, a pop-up window appears. The Recipient or Applicant edits or inputs any of the following information within the pop-up window:*



- Address
- Secondary Address (e.g., building, suite)
- City
- State
- Zip Code
- County
- Primary Location
- To edit or input address information:
    - Select the text box next to "Address"
    - Delete unwanted information
    - Input the correct information
- To edit or input secondary address information:
    - Select the text box below the address text box
    - Delete unwanted information
    - Input the correct information for a secondary address
- To edit or input city information:
    - Select the text box below the secondary address text box
    - Delete unwanted information
    - Input the correct city

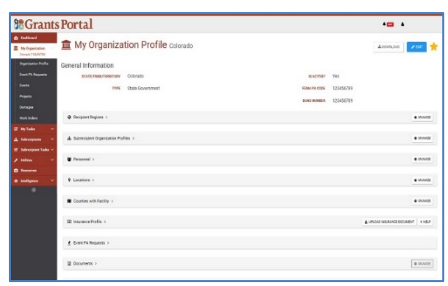
The Recipient or Applicant continues to edit or add organization locations.

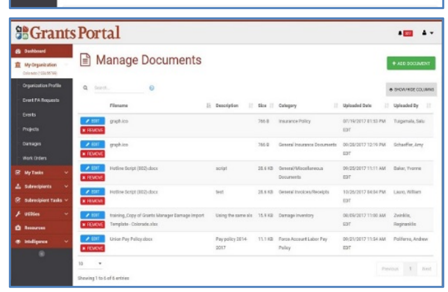
- To edit or input State information:
    - Select the drop-down list for States
    - Select the appropriate State
- To edit or input zip code information:
    - Select the text box under the State drop-down list
    - Delete unwanted information
    - Input the correct information
- To edit or input "Primary Location" designation:
    - Check or uncheck the box next to "Primary Location"

Once the Recipient or Applicant completes all the changes, they select the "Save" button. Grants Portal brings the Recipient or Applicant back to the "Manage Locations" page.

The Recipient or Applicant selects the "Save" button again on the "Manage Locations" page to ensure all changes are made. Upon selecting the "save" button, Grants Portal directs Recipients or Applicants to the "My Organization Profile" screen.

Uploading Documents





The Recipient or Applicant can upload other documents on the "My Organization Profile" screen of Grants Portal. Some examples of these documents are:

- Procurement and payroll policy
- Annual purchase agreements

Private nonprofit organizations can also upload pertinent documentation required by FEMA for eligibility purposes. These include:

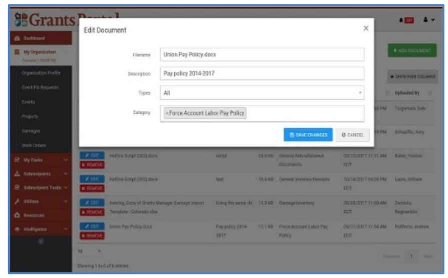
- Accreditation
- Insurance Policy
- Charter and By-Laws
- Tax Exemption certificate

Directions to upload documents:

- Select the "Manage" button to the right of the document drop-down list

Once the Recipient or Applicant selects the "Manage" button, Grants Portal directs them to the "Manage Documents" page. The Recipient or Applicant now edits, removes, or uploads their project-specific *documentation on this page.*

Directions to remove documents:



- Select the "Remove" button next to the document you wish to remove
- Select the "Yes" button when a pop-up window appears asking if you are sure you want to delete the document

Directions to edit documents:

- Select the "Edit" button next to the document

Directions to upload documents:

- Select the "Add Document" button in the top-right corner of the page

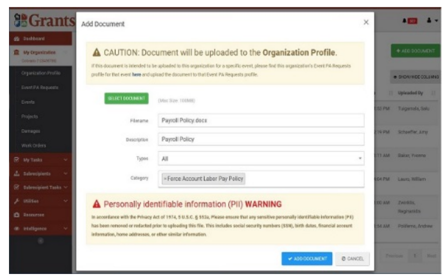
When the Recipient or Applicant selects the "Edit" button, a pop-up window appears.

Directions to edit your document:

- Select the text box next to "Filename" and enter the correct name of the file
- Select the text box next to "Description" and enter a description of the document
- Select the drop-down list next to "Types" and select the appropriate type for the document you previously uploaded
- Select the drop-down list box next to "Category" and select the appropriate category for the document
- Select the "X" next to inappropriate categories to delete them
- Select the "Save" button

When the Recipient or Applicant selects the "Add Document" button, a pop-up window appears.

Directions to upload a document:



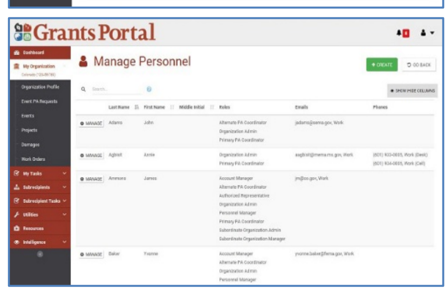
- Select the "Drag and drop a file here" box and choose the appropriate document from the saved location. The user can also drag and drop the appropriate document into the dotted "Document Upload" box
- Select the text box next to "Filename" and enter the correct name of the file
- Select the text box next to "Description" and enter a description of the document
- Select the drop-down list next to "Category Filter" and select the appropriate Category Filter for the document previously uploaded
- Select the drop-down list box next to "Category" and select the appropriate category for the document
- Select the "X" next to inappropriate categories to delete them
- Select the "Save" button

Managing Staff Roles, Contact Information, and Logins

Beyond inviting Applicants and other personnel to Grants Portal and editing the organization profile, Recipients and Applicants can manage their staff.

<u>Roles</u>

Recipients and Applicants have the option to manage staff roles of the personnel they invite to use Grants Portal and who are affiliated with their organization. Recipients and Applicants use this function to limit or to provide authorities within Grants Portal so personnel can accomplish their job.



To manage staff roles, the Recipient or Applicant must sign in to Grants Portal and navigate to the "Manage Personnel" page.

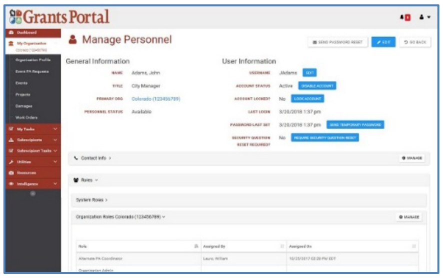
- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the "Personnel" drop-down list

Once the Recipient or Applicant selects the "Manage" button, the "Manage Personnel" page loads. On this page, the Recipient or Applicant chooses the person and roles to edit.

- Choose the staff and roles to manage

- Select the "Manage" button to the left of the person's last name

  After the Recipient or Applicant selects the "Manage" button, the specific staff's "Manage Personnel" page loads. This screen contains the general information and user information for the staff member. A Recipient or Applicant edits any of the following for the staff on this page:



- General information
- User information
- Contact information
- Roles
- Password reset requests
- Login history
- Select the roles drop-down list
- Select the "Manage" button to the right of the organization roles drop-down list for the staff roles to manage

  After the Recipient or Applicant selects the "Manage" button for the staff's organization roles to edit, a pop-up window appears in Grants Portal, with the specific roles the personnel have related to grants management.

  The Recipient or Applicant edits the staff's role by checking and unchecking boxes next to the roles the staff should have in Grants Portal. Staff can have multiple roles in Grants Portal.

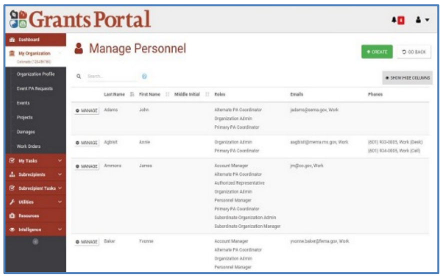
  If a Recipient or Applicant has any questions about the responsibilities and abilities a role provides to a staff member in Grants Portal, place the cursor over the question mark to the right of the role, and Grants Portal informs them.

- Select and unselect check-boxes for the roles the staff member should or should not undertake
- Select the "Save" button

Contact Information

Recipients and Applicants have the option to manage contact information for the personnel they invite to use Grants Portal and who are affiliated with their organization. Recipients and Applicants use this function in case a staff member cannot.

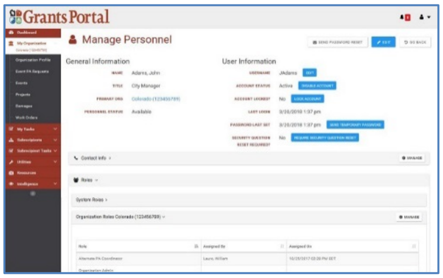
To manage staff roles, the Recipient or Applicant must sign in to Grants Portal and navigate to the "Manage Personnel" page.



- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the "Personnel" drop-down list

  Once the Recipient or Applicant selects the "Manage" button, the "Manage Personnel" page loads. On this page, the Recipient or Applicant chooses a person on their staff with the roles they want to edit.

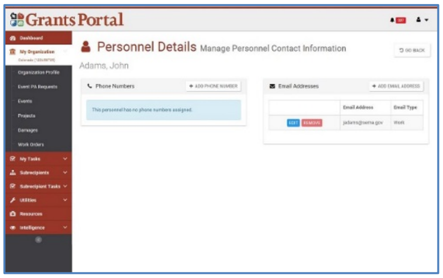
- Choose the staff and roles to manage
- Select the "Manage" button to the left of the person's last name



  After the Recipient or Applicant selects the "Manage" button, the specific staff's "Manage Personnel" page loads. This screen contains the general information and user information for the staff member. A Recipient or Applicant can edit any of the following for the staff on this page:

- General information
- User information
- Contact information
- Roles
- Password reset requests
- Select the "Manage" button to the right of the contact information drop-down list

  Once the Recipient or Applicant selects the "Manage" button, Grants Portal loads the "Personnel Details" page. The Recipient or Applicant adds, edits, and removes phone numbers and email addresses linked to the staff member.



- Select the "Edit" button under "Phone Numbers" to edit the staff member's phone number
- Select the "Remove" button under "Phone Numbers" to remove the staff member's phone number
- Select the "Add Phone Number" button, to add a phone number for the contact
- Select the "Edit" button under "Email Addresses", to edit the staff member's email address
- Select the "Remove" button under "Email Addresses", to remove the staff member's email address
- Select the "Add Email Addresses" button, to add an email address for the contact

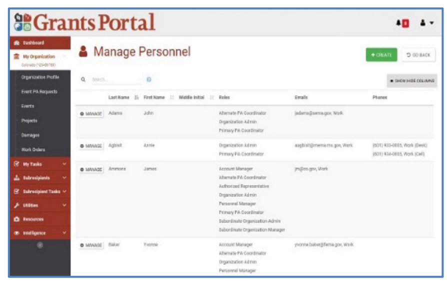
Login Information

Recipients and Applicants have the option to manage staff login information of the personnel they invite to use Grants Portal and who are affiliated with their organization. Recipients and Applicants use this function in case a staff member forgets their password or gets locked out of their account.

In order to manage staff login information, the Recipient or Applicant must sign in to Grants Portal and navigate to the "Manage Personnel" page.

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the "Personnel" drop-down list

  Once the Recipient or Applicant selects the "Manage" button, the "Manage Personnel" page loads. On this page, the Recipient or Applicant chooses which person to manage login information for.

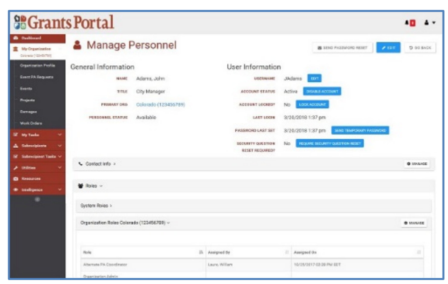


- Choose the staff login to manage
- Select the "Manage" button to the left of the person's last name

  After the Recipient or Applicant selects the "Manage" button, the specific staff's "Manage Personnel" page loads. This screen contains the general information and user information for the staff member. A Recipient or Applicant edits any of the following for the staff on this page:

- General information
- User information
- Contact information
- Roles
- Password reset requests

  Under "User Information," a Recipient or Applicant resets the staff member's password by sending them a temporary password.



- Select the "Send Temporary Password" button under "User Information"

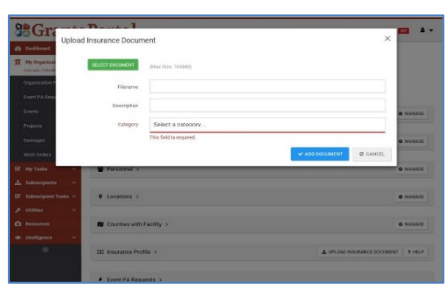
Editing Your Organization Profile: Uploading Insurance Documents

From the "My Organization Profile" screen, a Recipient or Applicant uploads their insurance documents.

Directions to upload insurance documents:

- Select the "Upload Insurance Document" button to the right of the insurance profile drop-down list
- Select the "Help" button to the right of the insurance profile drop-down list if you need help with the action

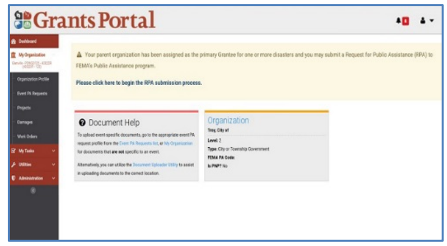
  Once the Recipient or Applicant selects the "Upload Insurance Document" button, a pop-up window appears in which they can upload their insurance documents.



- Select the "Select Document" button
- Navigate to the appropriate document from the saved location and select "Open"
- Select the text box next to "Filename" and enter the name of the file
- Select the text box next to "Description" and provide an accurate short description of the document
- Select the category drop-down list and select the accurate category that represents the insurance document
- Select the "Add Document" button

Chapter 3

The chapter describes submitting a Request for Public Assistance, and the information requirements to validate the request and initiate project formulation in Grants Portal.



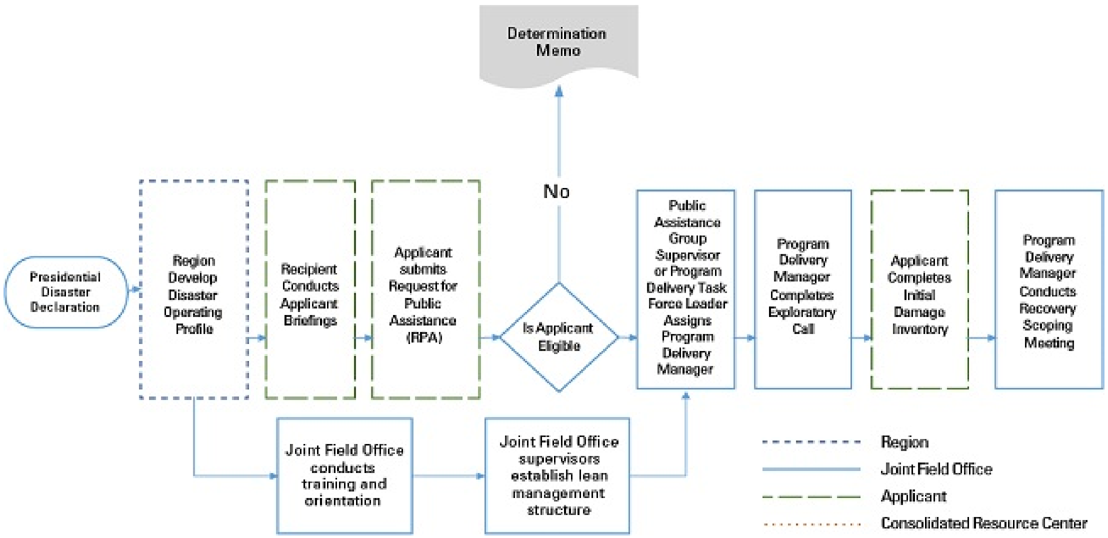
Upon completion of this chapter, participants will be able to:

Explain how to use Grants Portal during Phase I of the Public Assistance process.

Phase I: Operational Planning

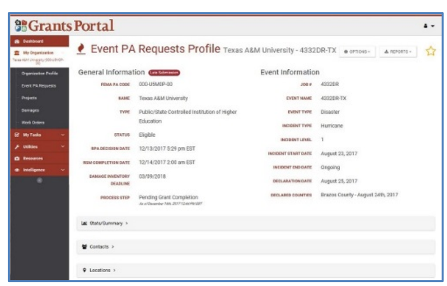
This is Phase I of the Public Assistance process: Operational Planning.

The objective for this phase is to identify the Applicants' disaster impacts and recovery priorities. FEMA gathers information to determine the operational needs of the incident.



In Phase I of the Public Assistance process, Recipients and Applicants carry out many tasks in Grants Portal. These include the following:

- Review the Event Profile
- Submit a Request for Public Assistance
- Approve the Request for Public Assistance
- Develop the Damage Inventory



Reviewing the Event PA Requests Profile

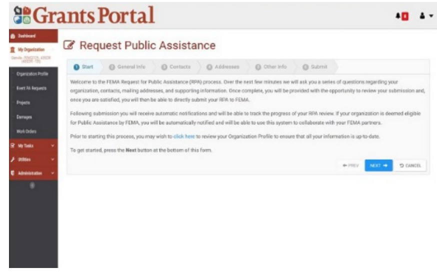
Grants Portal houses the Event PA Requests Profile, an Applicant's profile for an event. Applicants can upload their Damage Inventory and other documents pertinent to the event, as well as review the summary of the event as it pertains to their damage in the profile. The Event PA Requests Profile provides General and Event Information.

General Information

- FEMA Public Assistance Code
- State Government
- Status
- Request for Public Assistance Date
- Process Step

Event Information

- Job Number
- Event Name
- Event Type
- Incident Type
- Incident Level

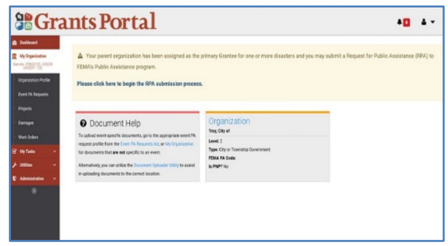


- Incident Start Date
- Incident End Date
- Declaration Date
- Declared Counties

There are also several drop-down menus below, including the Stats/Summary section, Contacts, Locations, Damage Inventory, EHP Profile, Documents, Comments, Requests for Information, Discussion, and Process Status History sections. All of these bars can be expanded by selecting on the arrow to the right of the bar title.

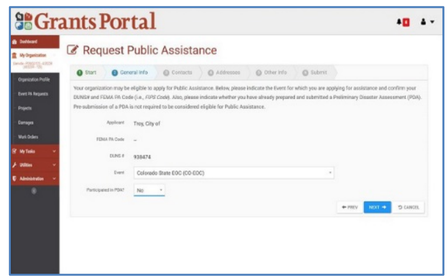
Submitting a Request for Public Assistance

To begin submitting a Request for Public Assistance, the Applicant signs in to Grants Portal, which loads their Dashboard. There will be a notification at the top of the page stating that the Applicant may submit a Request for Public Assistance.



This notification will only appear if a location in a designated county for the event is listed in the Applicant's Event PA Requests Profile. Grants Portal will also send out an email notifying the Applicant that they may submit a Request for Public Assistance. Before submittal, the Applicant should review their Organizational Profile to ensure the information and contacts are listed correctly.

Steps to submit a Request for Public Assistance. The Applicant should:

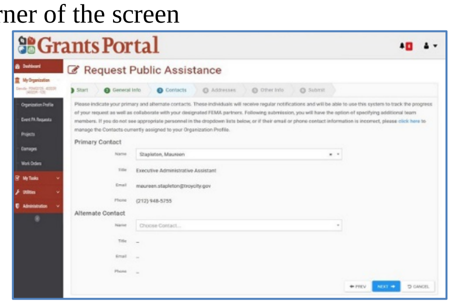


- Select the hyperlinked text that states, "Please click here to begin the RPA submission process"

  This brings the Applicant to the "Request for Public Assistance" page. Instructions are provided on this page, explaining that the Applicant must answer a series of questions regarding their organization, contacts, mailing addresses, and supporting information. Once completed, the Applicant reviews the overall submission. After reviewing, they submit the request to FEMA.

  Once submitted, the Applicant receives notifications through Grants Portal regarding their Request for Public Assistance status.

- Read the instructions and select the blue "Next" button at the bottom right corner of the screen

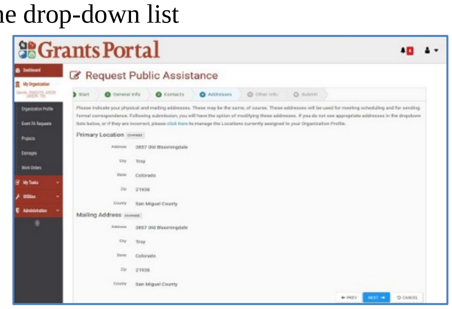


  The Applicant then arrives at the "General Information" tab. Here, Grants Portal displays the General Information associated with the Applicant's request. This includes the Applicant name, FEMA PA Code, DUNS Number, Event Name, and the Participated in PDA drop-down list.

- Select the applicable event in the Event drop-down list
- Select Yes or No in the "Participated in PDA" drop-down list
- Select the blue "Next" button in the bottom-right corner of the screen

  At this stage, the Applicant is at the "Contacts" tab. Here, the Applicant must indicate their primary and alternate contacts for this event. The indicated contacts will receive regular notifications and will be able to use Grants Portal to track the request progress as well as interact with designated FEMA partners such as the FEMA Program Delivery Manager.

- Under "Primary Contact," select the desired name from the drop-down list
- The name, title, email address and phone number will be displayed beneath the drop-down list

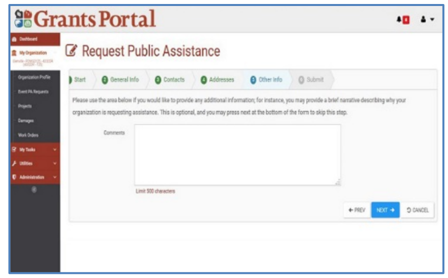


- Under "Alternate Contact," select the desired name from the drop-down list
- Select the blue "Next" button at the bottom right corner of the screen

  After completing the "Contacts" tab, the Applicant adds information for their primary location and mailing address in the "Addresses" tab. These addresses will be used for scheduling meetings and sending formal written correspondence.

  If the Applicant needs to modify the addresses, they will have to begin the Request for Public Assistance process again after entering the correct information in their Organizational Profile.

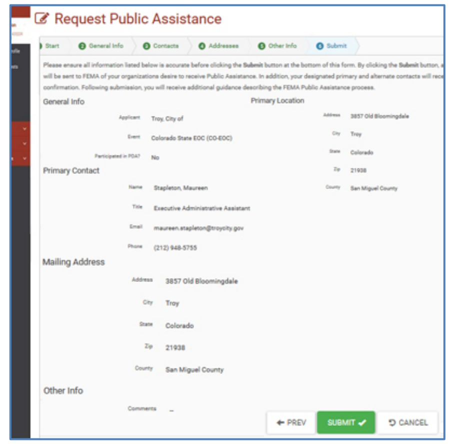
- Verify Primary Location or select the "Change" button



- Verify the mailing address or select the "Change" button
- Select the blue "Next" button in the bottom right corner of the screen once all the information is complete

After completing the "Addresses" tab, Grants Portal loads the "Other Information" tab. Here, the Applicant can provide any additional information, such as a brief narrative describing the reasons for requesting assistance.

Steps to Submit a Request for Public Assistance. The Applicant should:



- If necessary, enter any additional information in the text box

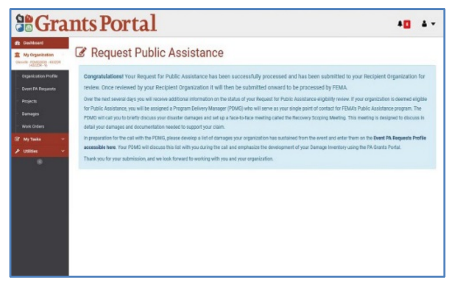
This section is optional and may be skipped by selecting on the blue "Next" button in the bottom right corner of the screen

After completing the "Other Information" tab, the Applicant reviews the information from all tabs in its entirety. The Applicant must review all information for accuracy before selecting the green "Submit" button in the bottom right corner of the screen.

- Review all information
- Select the "Submit" button

After selecting "Submit," a Congratulations Screen appears. It states that the Request for Public Assistance has been successfully processed and submitted to the Recipient organization for review. The application is complete by submitting a Request for Public Assistance.

Reviewing the Request for Public Assistance



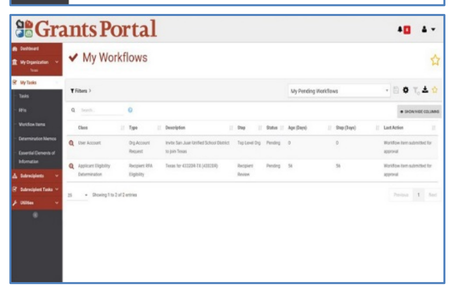
Once the Applicant submits the Request for Public Assistance, the Recipient receives an email from Grants Portal stating they have a Request for Public Assistance to review. Grants Portal also notifies the Recipient via their "My Tasks" tab in the system.

The Recipient reviews the submission and either approves or denies the Request for Public Assistance.

If the Recipient approves the Request for Public Assistance, it is forwarded to

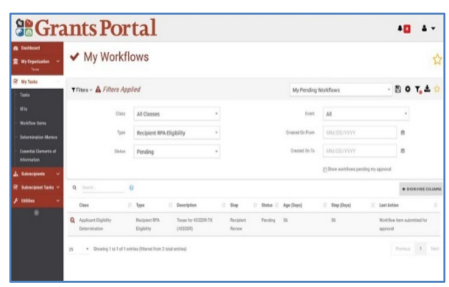
FEMA for review.

Approval of Request for Public Assistance



The following outline the review and approval process of the Request for Public Assistance from the Recipient perspective.

The Recipient must navigate to the "My Tasks" section in the "My Organization" pane on the left side of the screen. This is where workflow items can be viewed.



- Select "Workflow Items" from the "My Tasks" section on the left side of the screen

Once "Workflow Items" is selected, Grants Portal redirects the Recipient to the "My Workflows" page. Here the active project workflows can be viewed, and search filters applied.

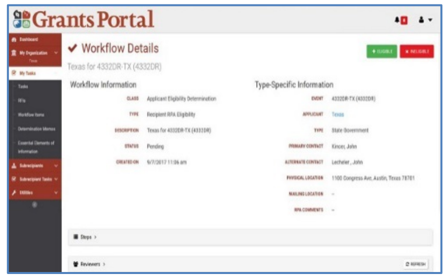
- Select the "Filters" drop-down to expand the section
- Select "Recipient RPA Eligibility Type" from the "Type" dropdown
- Select the magnifying glass to the left of the relevant workflow

The Recipient can now view the Workflow Details including Workflow Information such as:

  - Class
  - Type
  - Description
  - Status

- o Created on (date)

They can also view Type-Specific Information such as:



- o Event title
- o Applicant
- o Type
- o Primary Contact
- o Alternate Contact
- o Physical Location
- o Mailing Location
- o RPA Comments

- After verifying all information is accurate, select the green "Eligible" button or the red "Ineligible" button at the top right of Grants Portal

  If the Recipient determines that the Applicant's Request for Public Assistance is eligible, a pop-up box will appear, asking if they are sure of the determination.

- Fill out the "Reason" text box, providing an explanation why the Applicant has been determined to be eligible
- Select the "Yes" button

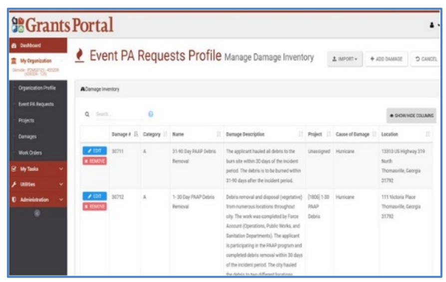
  If the Recipient determines that the Applicant's Request for Public Assistance is ineligible, a pop-up box will appear, asking if they are sure of the determination.

- Fill out the "Reason" text box, providing an explanation of why the Applicant has been determined to be ineligible
- Select the "Yes" button

Developing the Damage Inventory

The Damage Inventory provides initial information on the damages the Applicants believe were caused by the event. During the Exploratory Call, the Program Delivery Manager will introduce the Applicant to the Damage Inventory and review in greater detail during the Recovery Scoping Meeting.

The Applicant has 60 days from the Recovery Scoping Meeting to identify damages from the event and enter the Damage Inventory to Grants Portal.

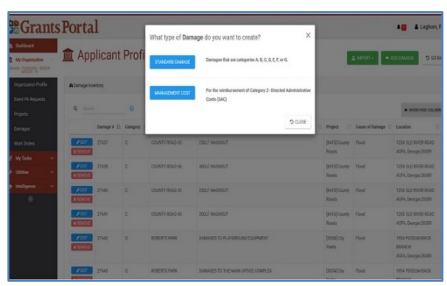


Adding Damages

To begin adding single damages to the Damage Inventory, the Applicant navigates to the "My Organization" pane.

- Select "Applicant Event Profiles" in the "My Organization" pane
- Then select the magnifying glass on the left of the Event number

  After selecting on the magnifying glass, the Applicant can see the project details.



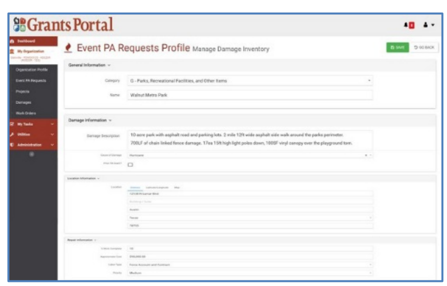
- Scroll down to the Damage Inventory bar
- Select the "Manage" button in the bottom right corner of the screen

  Once the Applicant selects "Manage," the Damage Inventory and all current entries can be viewed. To add a single damage,

- Select the "Add Damage" button in the top right corner of the screen

  Selecting "Add Damage" causes a pop-up window to appear. It asks, "What type of Damage do you want to create?" and displays two options: Standard Damage and Management Cost.

  Standard Damage entails damages that are categories A-G. Management costs pertain to reimbursement of Category Z- Directed Administrative Costs.



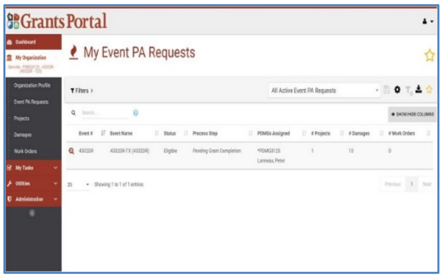
- Select "Standard Damage"

  The pop-up window will disappear after the Applicant selects "Standard Damage." The Applicant returns to the Event PA Requests Profile with the General Information and the Event Information. Complete the fields for the Category of Work, the facility name, the Damage Description, location, and repair information.

- Once all information is complete, it can be saved in Grants Portal

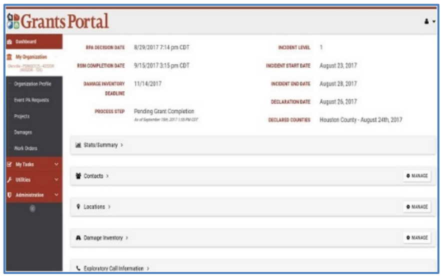
- Select the green "Save" button in the top right corner of the screen

Event PA Requests



To access the Damage Inventory, the Applicant follows the same steps as the previous process. First, navigate to the My Organization Profile in the task pane.

- Select the "My Organization" tab
- Select the "Organization Profile" tab
- Select "Applicant or Recipient Event Profiles" Requests.
- Select the magnifying glass to the left of the Event title to access the project details

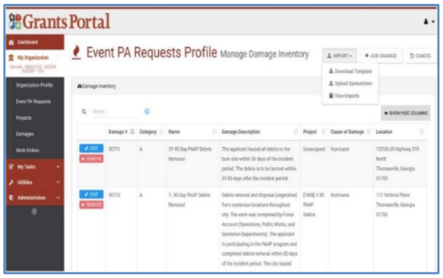


Adding multiple damages at one time is significantly easier when using the Damage Inventory Template. The following steps show the Applicant how to use the template to upload multiple damages at once to Grants Portal.

Once the Applicant selects an Event Title, project details such as the Request for Public Assistance decision date, the Recovery Scoping Meeting completion date, the Damage Inventory deadline, and the current process step can be viewed.

- Scroll down to the Damage Inventory
- Select the "Manage" button on the right side of the screen

Downloading Template



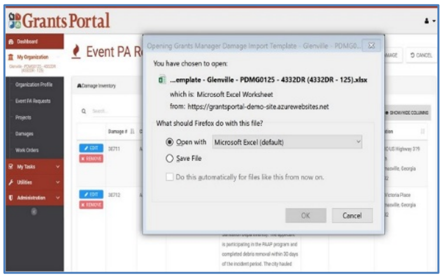
Once the Applicant has navigated to the "Damage Inventory" bar, the list of current damages associated with the project can be viewed.

- To download the Damage Inventory template, select the "Import" button at the top right corner of the screen
- A drop-down list will appear. Select the "Download Template" option on that drop-down list

  After selecting on the "Download Template" option, a pop-up window appears.

- Select the "Open With" option and ensure that it is set to open with Microsoft Excel
- Select "OK"

Enable Editing



Once the Applicant has downloaded the Damage Inventory template, the file download opens with Excel and the Applicant is able to view the spreadsheet template.

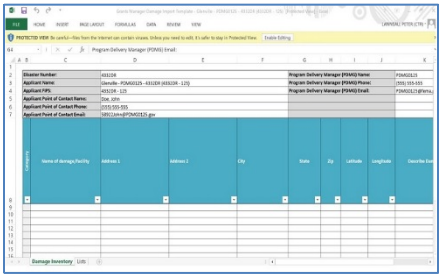
- Select "Enable Editing" in the "Protected View" bar at the top of the spreadsheet

  Once the Applicant enables editing to the spreadsheet, the template is automatically populated with the necessary damage information:

  - Incident Number
  - Applicant Name
  - Applicant Point of Contact information

  Additionally, the following damage information can be edited:

  - Category of Work
  - Address of damaged site and GPS coordinates
  - Detailed damage description

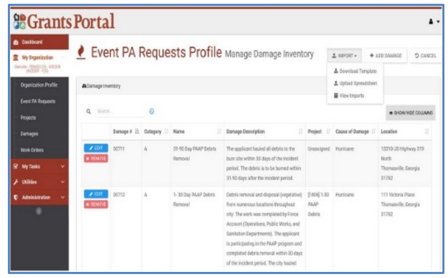


Filling the Template

The Applicant completes each of the columns in the spreadsheet and ensures that the updated Microsoft Excel spreadsheet is saved to their desktop.

It is extremely important that the Applicant does not modify or change the spreadsheet template in any way, or skip rows when entering damage information.

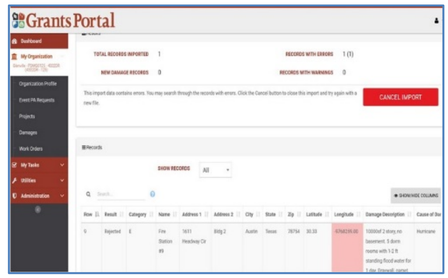
Uploading the Template



The Applicant returns to Grants Portal to upload the completed Damage Inventory Spreadsheet.

- In the "Applicant or Recipient Event Profile" on the same page where the Damage Inventory template was downloaded, select the "Import" button at the top right corner of the screen
- From the drop-down list, select "Upload Spreadsheet"
- A File Upload pop-up window will appear. Locate where the Damage Inventory template was saved.
- Select the file template
- Select "Open"

If Errors Exist

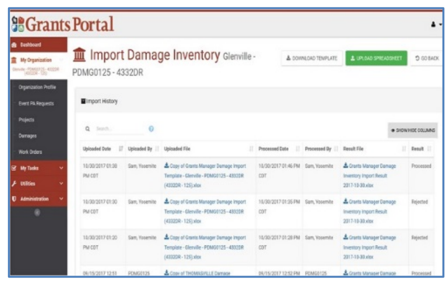


Grants Portal will detect errors if any information was entered incorrectly into the template when the Applicant uploads the template. There will be a notification in the top of the Applicant Event Profile of the number of records with errors.

Applicants should scroll down to review the red boxes at the bottom of the screen to view what items the Grants Portal has deemed as an error. This will assist you to be able to correct these items.

- Verify the errors or warnings
- Select the red "Cancel Import" button on the right side of the screen

  The "Cancel Import" pop-up window appears. It asks, "Do you wish to cancel this import?"



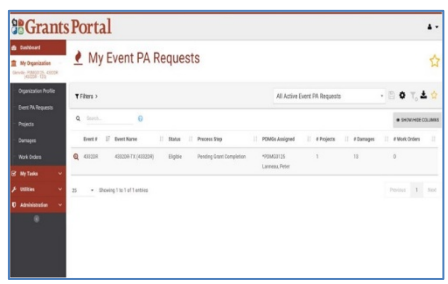
- Select the red "Cancel Import" button
- Resolve any errors on the Microsoft Excel worksheet
- Save the spreadsheet to their computer and then re-upload the correct spreadsheet

If Errors Do Not Exist

If the Damage Inventory template has no errors, there will be no error or warnings in the Import Damage Inventory section.

- Select the green "Commit Import" button

  After selecting on the "Commit Import" button, the pop-up window will appear. It asks, "Do you wish to commit the changes in this import?"

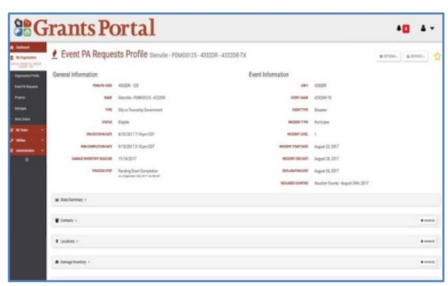


- Once ready, select the "Commit Import" button

  The Applicant's newly uploaded Damage Inventory is visible in the "Import Damage Inventory" section.

Editing Submitted Damage Inventory

The Applicant may wish to edit a Damage Inventory that has already been uploaded to Grants Portal. Much like the previous process, the Applicant will navigate to the "My Organization" pane.

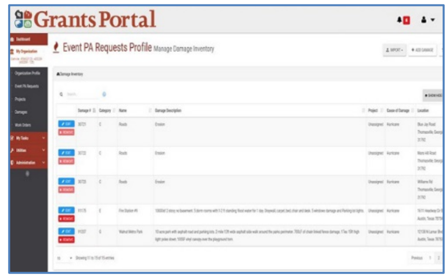


- Select "Event PA Requests" from the "My Organization" pane on the left side of the screen
- Select the magnifying glass next to the current Event

  The Applicant is now in the "My Applicant or Recipient Events Profile" of the event selected to edit. The Applicant can scroll down to the "Damage Inventory" bar.

- Scroll down to the "Damage Inventory" bar
- Select the "Manage" button on the right side of the screen on the "Damage Inventory" bar

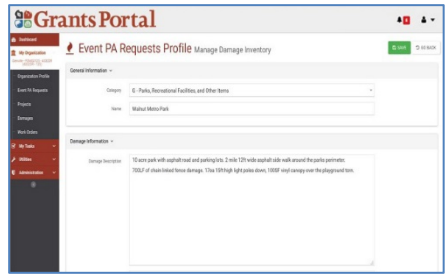
Once the Applicant is in the Manage Damage Inventory page, all the uploaded damages can be viewed.



- Select the blue "Edit" button on the left of the Damage Inventory to be edited

Now the Applicant can edit the General or Damage Information as needed.

- Select the text box next to the "Damage Description" and edit it as needed
- When finished, select the green "Save" button at the top right corner of the screen



The "Save Changes" pop-up window will appear.

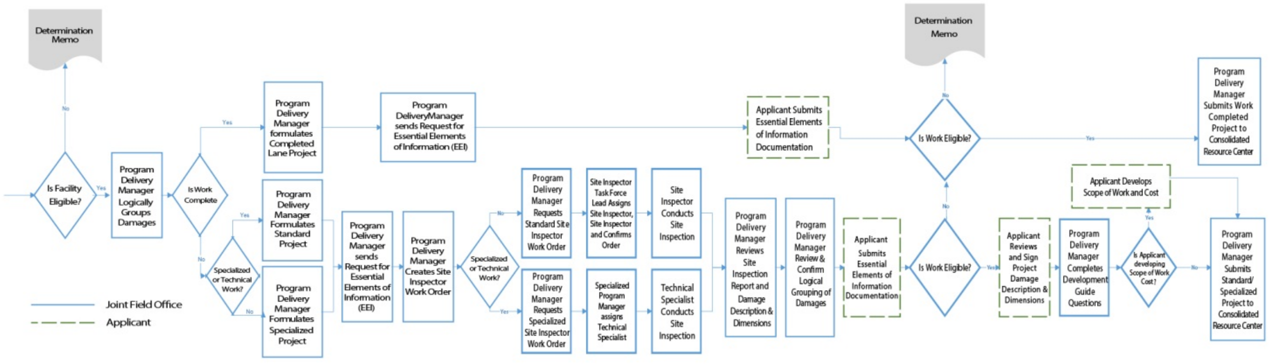
- If the Applicant has made all necessary edits to the Damage Inventory, select the blue "Yes" button

Chapter 4

Phase II: Damage Intake and Eligibility Analysis

This is Phase II of the Public Assistance process: Damage Intake and Eligibility Analysis.

The objective is to capture the Applicant's incident-related damage and determine eligibility within sixty days of the Recovery Scoping Meeting.



Phase I Transition to Phase II

In the previous chapters, participants learned about Grants Portal activities for Phase I: Operational Planning.

At the end of Phase I, the following should have occurred:

- The Applicant's incident-related damage, which were placed into projects or multiple projects, will be moved to processing lanes based on the complexity of the work
- Finalization of the Damage Inventory
- A project will either be routed to the field or the Consolidated Resource Center, based on work completed
- The FEMA Program Delivery Manager will group similar damages into projects with the Applicant to prepare for Phase II.

Introduction to Phase II

In Phase II of the Public Assistance process, FEMA captures all the Applicant's disaster-related damage within 60 days of the Recovery Scoping Meeting.

The Program Delivery Manager begins the phase by making eligibility recommendations regarding the Applicant's facility to the Public Assistance Field Leadership. When the facility is determined eligible, the Program Delivery Manager logically groups damages into projects and places them into one of three lanes based on complexity.

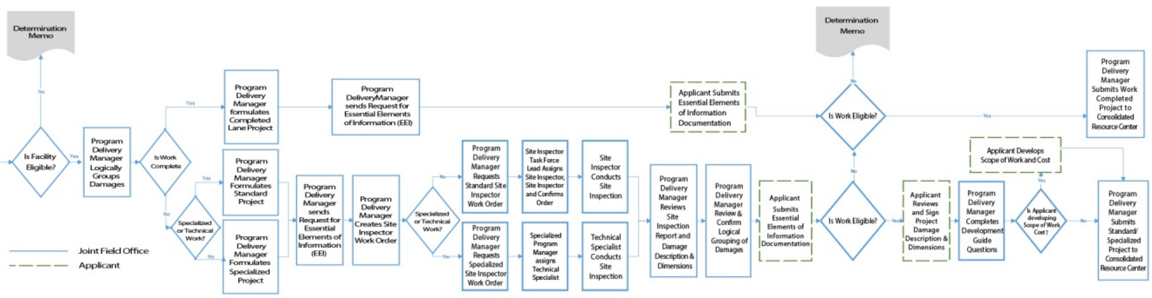
- Projects that are 100% complete move into the Completed/Fully Documented Lane
- Projects with work to be completed are placed in the Standard or Specialized Lane

The lane in which the Program Delivery Manager places the project determines the process of Phase II. The next screen describes the actions completed in each lane in Phase II.

<u>Completed/Fully Documented Lane</u>:

- The Program Delivery Manager requests Essential Elements of Information, also known as supporting documentation
- The Applicant submits required Essential Elements of Information
- The Program Delivery Manager reviews the documents loaded into the Essential Elements of Information to ensure they support the claimed damages

If the work is deemed eligible by Field Public Assistance Leadership, the Program Delivery Manager routes the project(s) to the Consolidated Resource Center



Standard and Specialized Lanes:

- The Program Delivery Manager requests Essential Elements of Information
- The Program Delivery Manager creates Site Inspection Work Orders
- FEMA and the Applicant conduct the site inspection
- The Site Inspector/Technical Specialist develops the Site Inspector Report and the Damage Description and Dimensions
- The Program Delivery Manager reviews the Site Inspector's Damage Descriptions and Dimensions
- The Program Delivery Manager ensures the Applicant's damages are grouped appropriately
- The Applicant completes the submission of all Essential Elements of Information
- The Program Delivery Manager reviews the documents uploaded and verifies the Essential Elements of Information are received
- The Applicant reviews and signs the Damage Description and Dimensions
- The Program Delivery Manager completes the Development Guide Questions with the Applicant
- The Applicant may decide to develop their own scope of work and cost estimate

The Program Delivery Manager forwards the project to the Consolidated Resource Center

Phase II Grants Portal Activities

Throughout the actions in the Completed/Fully Documented, Standard, and Specialized Lanes in Phase II of the Public Assistance Delivery Model, the Applicant uses Grants Portal. The rest of this chapter covers Grants Portal activities involved in these lanes.

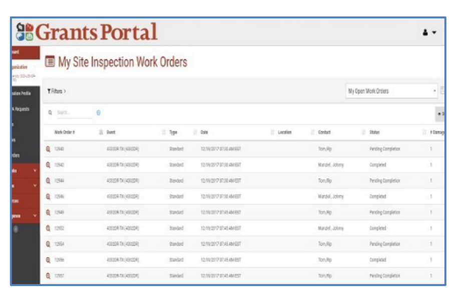
Grants Portal activities for Phase II include:

- Monitoring Site Inspection Work Orders
- Monitoring projects
- Reviewing and approving Damage Description and Dimensions
- Completing requests for Essential Elements of Information
- Managing Requests for Information

Site Inspection Work Orders

For work to be completed, placed in the Standard or Specialized lanes, the Program Delivery Manager schedules a site inspection with the appropriate personnel. The Site Inspection Work Orders are sent to the FEMA Site Inspection Task Force Leader who assigns a FEMA Site Inspector.

Monitoring Site Inspection Work Orders

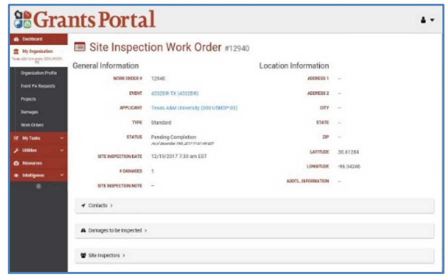


Tracking Site Inspection Work Orders in the Grants Portal is important for coordinating with the FEMA Program Delivery Manager and Site Inspector to accurately record incident-related damage in a timely manner. The Applicant can monitor Site Inspection Work Orders in Grants Portal.

- Navigate to the Grants Portal Dashboard page
- Select the "Work Orders" tab under the "My Organization" pane

  Once the Applicant selects the Work Order, Grants Portal directs them to the "My Site Inspection Work Orders" page. The "My Site Inspection Work Orders" page displays information regarding the status, number of damages, and contact information for each Site Inspection Work Order that has been scheduled for the Applicant.

Steps to track a Site Inspection Work Order.

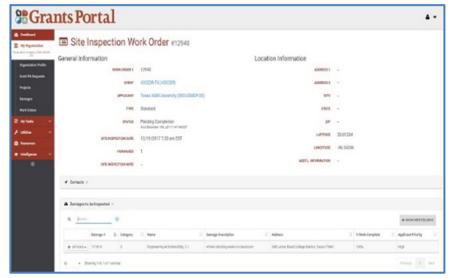


- Select the magnifying glass near the Work Order number to display additional details regarding each Site Inspection Work Order

  From this page, the Applicant can view general information regarding the individual Site Inspection Work Order as well as detailed information regarding:

  - Contacts
  - Damages to be Inspected
  - Site Inspectors

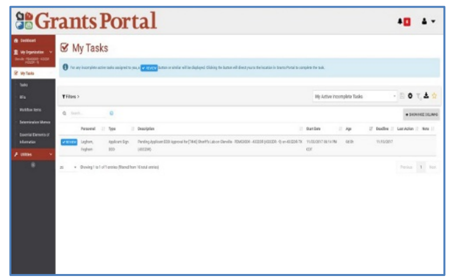
  The Applicant is encouraged to review the Damages to be Inspected for each Site Inspection Work Order prior to the Site Inspection. This helps in planning a time effective strategy or plan to see all the designated sites.



Site Inspection Conduct

Site inspections are required for identifying and recording incident-related damages timely and accurately for all work to be completed.

During site inspections, the Applicant and FEMA inspect the damages identified in Grants Portal, specifically the Damage Inventory.

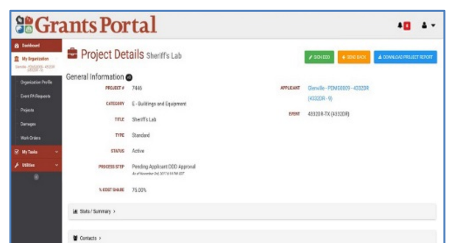


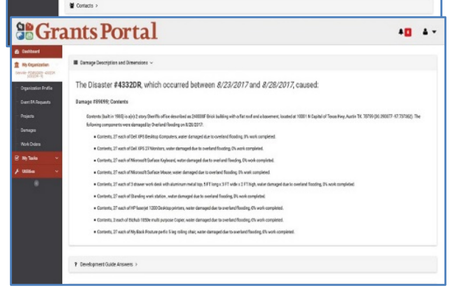
Damage Description and Dimensions

Following the site inspection, the Site Inspector develops the Damage Description and Dimensions using information from the Site Inspection Report. The information gathered during the site inspection will be entered into Grants Portal and automatically generate the Damage Description and Dimensions.

The Program Delivery Manager reviews the Damage Description and Dimensions and discusses it with the Site Inspector if there are any questions.

The Program Delivery Manager then approves the Damage Description and Dimensions and notifies the Applicant, via Grants Portal, that it is ready for review and electronic signature.





Notification

The Applicant will receive notifications through Grants Portal via email that the Damage Description and Dimensions is complete and ready for review and signature.

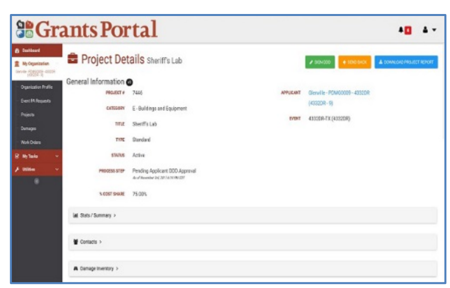
Applicants can also track and monitor projects by selecting the "My Tasks" tab on the Dashboard of Grants Portal.

Viewing

In order to continue the Public Assistance process after the Site Inspection, the Applicant must agree to the Damage Description and Dimensions. To review and sign the Damage Description and Dimensions, the Applicant navigates Grants Portal. Steps to review the Damage Description and Dimensions are:

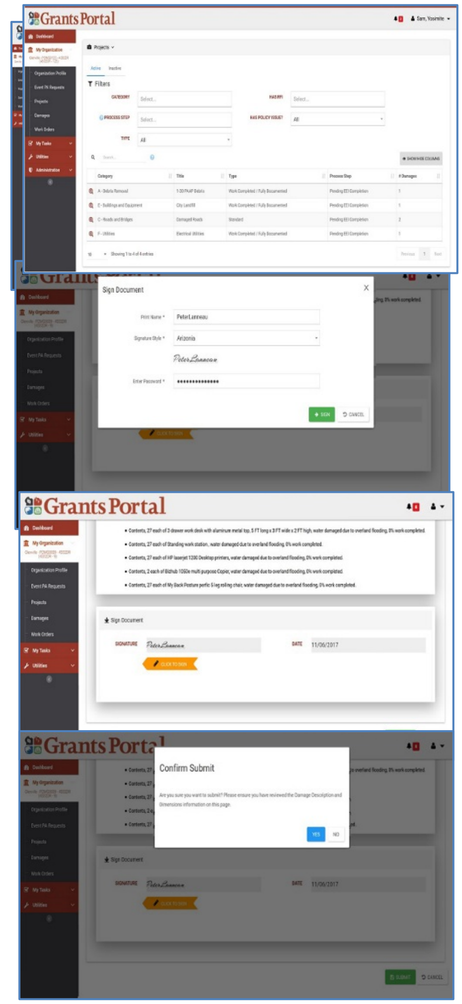
- Select the "My Organization" tab on the left side of the screen
- Select the "Projects" button, then select a Damage Description and Dimensions for review

  Once the Applicant selects the project, Grants Portal directs them to the Project Details page. From this page, the Applicant loads the Damage Description and Dimensions.



- Scroll down to the Damage Description and Dimensions bar on the "Project Details" page
- Select the "Damage Inventory" drop-down list
- Review the Damage Descriptions and Dimensions

Signing



After reviewing the Damage Description and Dimensions, the Applicant either reach out to their Program Delivery Manager if there are any questions or sign it if the Applicant concurs.

Steps to sign the Damage Description and Dimensions: The Applicant should:

- Scroll to the top of the "Project Details" page
- Select the yellow "Send Back" button if changes are needed
- Select the green "Sign DDD" button to sign the Damage Description and Dimensions

Project Signature

When the Applicant selects the "Sign DDD" button, Grants Portal navigates to the Sign Document drop-down list. The Applicant signs here.

- Select the "Select to Sign" Ribbon

  Once the Applicant selects the "Select to Sign" ribbon a pop-up window appears.

- Select the text box next to "Print Name" and enter the signees name
- Select the drop-down list next to "Signature Style" and choose the handwriting style for the signature
- Enter the account password
- Select the "Sign" button
- Select the "Submit" button

  After the Applicant selects the "Submit" button, a pop-up window appears and asks the Applicant to confirm the submittal.

- Select the "Yes" button

Essential Elements of Information (EEI)

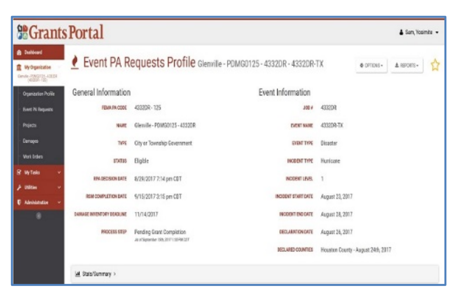
During the Recovery Scoping Meeting, the Program Delivery Manager discusses documentation that the Applicant must submit to support their facility, work, and cost claims. Based on this conversation, the Program Delivery Manager indicates required documentation needed to learn more about the damage claims, which serves as the request for Essential Elements of Information.

The Program Delivery Manager will enter the Essential Elements of Information in Grants Portal after the Recovery Scoping Meeting and logically group all damage line items into projects. Depending on the project's Category of Work, the Program Delivery Manager may select additional Essential Elements of Information based on the categories of damages included in the project. The Applicant will then be able to upload requested documents that support damage claims.

In order to make eligibility recommendations to Public Assistance Field Leadership, the Program Delivery Manager needs all Essential Elements of Information. Throughout Phase II of the Public Assistance Delivery Model, the Applicant submits the Essential Elements of Information. Without the required information, the Applicants grant funding is jeopardized.

The following will outline processes for the Essential Elements of Information in the Grants Portal.

Accessing EEI



After the Recovery Scoping Meeting occurs, the Applicant must upload supporting documentation for their facility, work, and cost claims, and answer any Essential Elements of Information from FEMA.

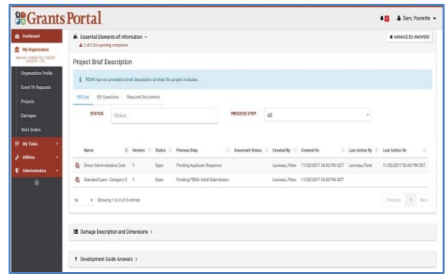
- Navigate to the My Organization section on the task pane and select "My Organization"
- Select "Event PA Requests"
- Select the magnifying glass to the left of the project you are working on

  The Applicant is now able to view the Event PA Requests Profile, which contains General Information as well as Event Information.

- Scroll down to the "Projects" bar

- After the Applicant has scrolled down to the "Projects" bar within the "Event PA Requests Profile", select the down arrow to expand the "Projects" bar

  Once the "Projects" bar is expanded, the Applicant can view the projects which have pending Essential Elements of Information.



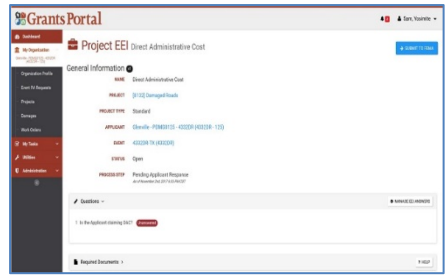
- Select the magnifying glass next to the project to work on

  Now that the Applicant opened the project to work on, locate the project's requested Essential Elements of Information.

  There will be a notification at the top of the screen stating, "This project is pending EEI Completion."

- Select the text below the notification that states, "View Project EEI"

  Alternatively, the Applicant can scroll down to the "Essential Elements of Information" bar



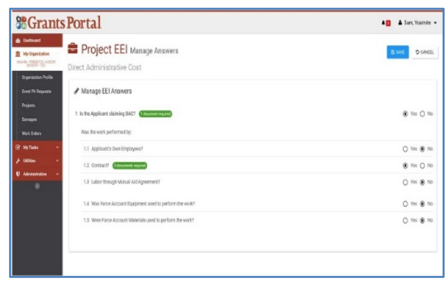
Review Unanswered Questions

In the "Essential Elements of Information" bar, the Applicant can see the list of the required Essential Elements of Information.

- Select the magnifying glass next to the Essential Element of Information to be completed

  The Applicant is now in the Project EEI section and must complete the Unanswered Questions.

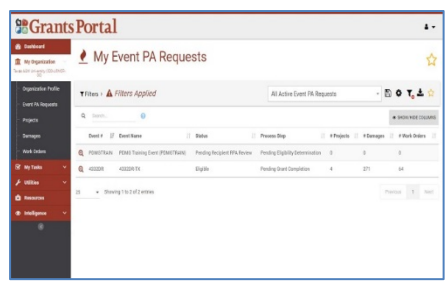
- Expand the "Questions" bar by selecting on the arrow to the right
- Select "Manage EEI Answers"



Answer Questions

Once the Applicant selects "Manage EEI Answers" the unanswered questions can be answered.

- Ensure that all questions are answered
- Select the blue "Save" button at the top right corner of the screen when all the questions have been answered

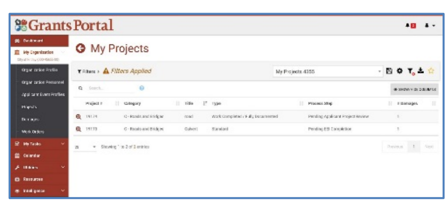


Review and Verify

Once the Applicant answers all the unanswered questions, review and verify the answers.

The Applicant verifies and confirms that the answers are correct by reviewing them again

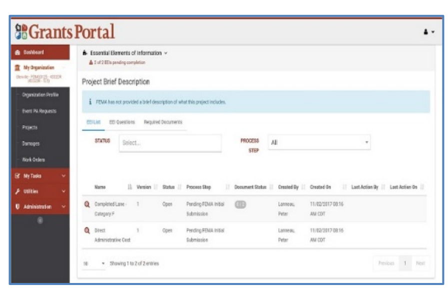
Document Upload



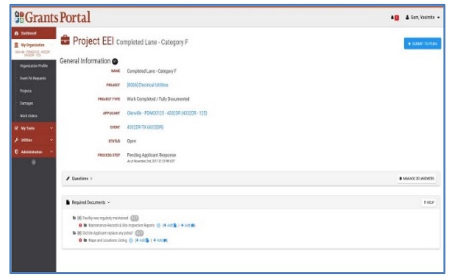
Now that the Applicant has completed the answers for all requested Essential Elements of Information, supporting documentation must be uploaded or attached.

- As before, navigate to "My Organization" on the left
- Select "Event PA Requests"
- Select the magnifying glass next to the project to upload documentation
- Scroll down to the specific project to be updated.
- Scroll down to the Projects bar
- Locate the specific project and required Essential Elements of Information.
- Expand the "Projects" bar
- Select the magnifying glass next to the project to update
- Select the "View Project EEI" or simply scroll down and expand the "Essential Elements of Information" bar

  After selecting "View the Project EEI", the Applicant can see the Project

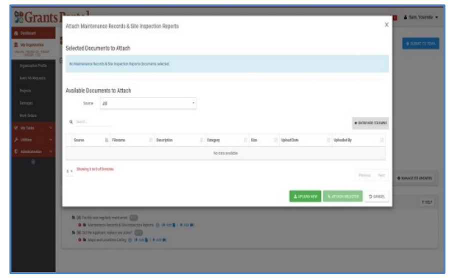


Brief Description.



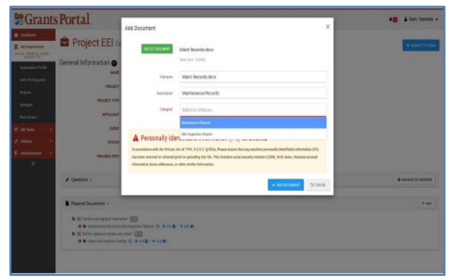
- Locate the Essential Element of Information to be updated and select the magnifying glass on the left
- Review the questions and prepare the appropriate documents to be uploaded
- Scroll down to the "Required Documents" bar and expand it by selecting on the down arrow
- Select the blue "Add" button next to the Essential Elements of Information

A pop-up window appears labeled "Attach Maintenance Records and Site Inspection Reports."



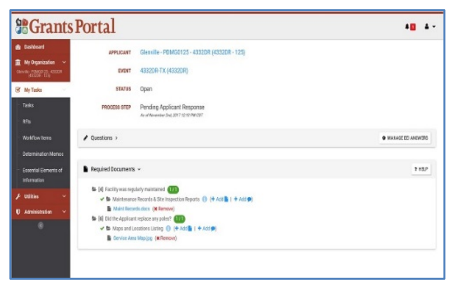
- Select the green "Upload New" button in the bottom right corner of the pop-up window or drag and drop a file into the dotted box at the top of the pop-up window.
- Select the appropriate document
- Select "Open"
- Type the description of the document
- Select "Category" to add a document tag
- Select the blue "Add Document" button
- Verify it is the correct document by placing the mouse over the file name

A File Details box will pop up and show the Description, Category, and file size of the document



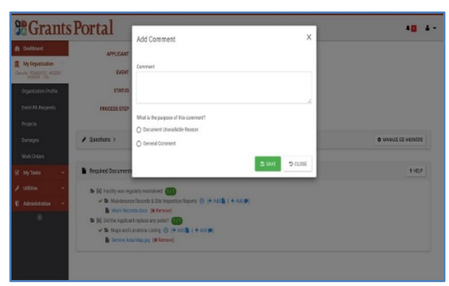
- Select the green "Attach Selected" button

Remove Documents



The Applicant can also remove a document. To remove a document that was attached to an Essential Element of Information, the Applicant can select the red "Remove" button to the right of the document.

Add Comments



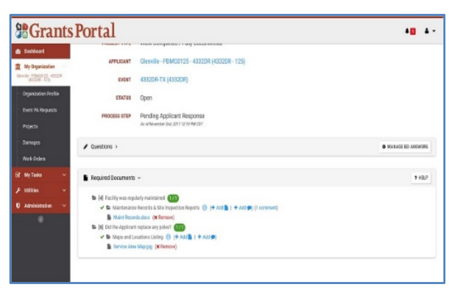
Adding comments to an Essential Element of Information is an easy process. An Applicant should add a comment if there is no supporting documentation, or if they want to refer FEMA to a different document that was uploaded.

- Navigate to the "Required Documents" bar within the Essential Element of Information and select the "Add" comment bubble to the right of the "Add" document

This will cause an "Add Comment" pop-up window to appear. In the comment box, the Applicant can:

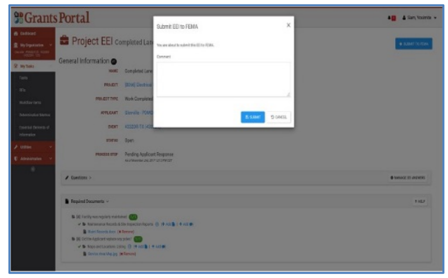
- Type the comment
- Select the type of comment
  - o Document Unavailable - Reason
  - o General Comment
- Then select the green "Save" button to close the pop-up window
- The Applicant selects on the comment that now appears to the right of the "Add" comment bubble to verify that the comment added is accurate

Send to FEMA



Once all documents are attached to the Project EEI, the Applicant is now ready to send the Essential Elements of Information back to FEMA. There will be green checkmarks that confirm everything is complete next to each Essential Element of Information item.

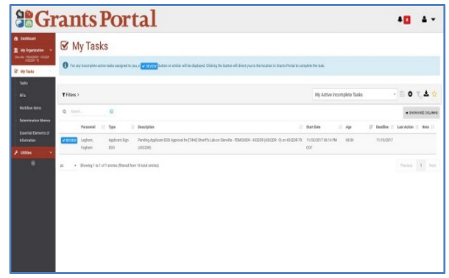
- Confirm that the documents are attached
- Select the blue "Submit to FEMA" button at the top right corner of the page



A pop-up window will appear asking if the Applicant is ready to submit the Essential Element of Information to FEMA.

- Enter any further comments necessary into the text field
- When complete, select the blue "Submit" button

Requests for Information



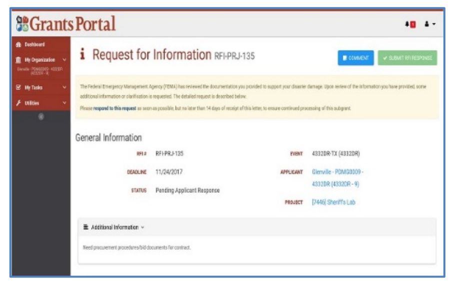
If the Applicant does not provide the documentation for Essential Elements of Information in a timely manner, or if FEMA staff determines that more documentation is needed, FEMA may issue a Request for Information.

The Request for Information process occurs in Grants Portal. There is a 30-day deadline for the Applicant to respond to the Request for Information in Grants Portal.

Locating

Once FEMA issues a Request for Information, the Applicant receives a notification through Grants Portal and via email. The Applicant should:

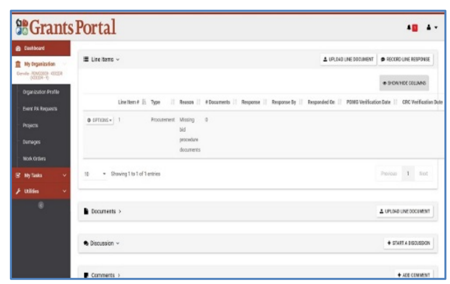
- Sign in to Grants Portal
- Select the bell icon located in the top right corner of the screen
- Select the "Review" button to the left of the Request for Information



Viewing

Once the Applicant selects the "Review" button, Grants Portal loads the Request for Information page. A notification at the top of the page details the deadline to reply to the Request for Information

- Expand the "Additional Information" drop-down list
- Review the requested documentation under the "Additional Information" drop-down list
- Scroll down to the "Line Items" drop-down list

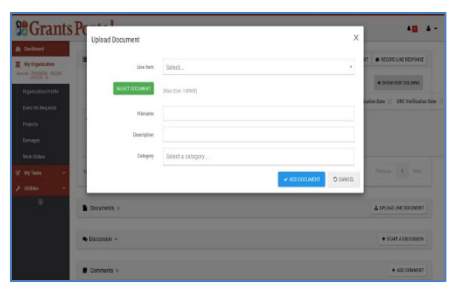


Upload Documentation

After scrolling down to the "Line Items" drop-down list, the Applicant begins the upload process.

- Expand the "Line Items" drop-down list
- Select the "Upload Line Document" button

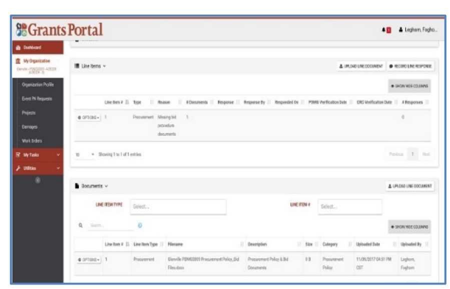
Once the Applicant selects the "Upload Line Document", a pop-up window titled "Upload Document" appears.



- Select the "Select Document" button or drag and drop the document into the dotted box to upload it.
- Select the desired document and select "Open"

Once the Applicant selects the appropriate document, the document information is completed.

- Select the Line Item from the drop-down list
  - o This defines the document (e.g., procurement)
- Add the document description
- Add document category type
- Select the "Add Document" button



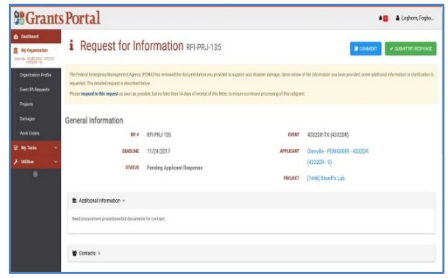
Once the Applicant selects the "Add Document" button the window disappears they confirm that the document uploaded properly.

- Expand the "Documents" drop-down list
- Review and confirm uploaded document
- Scroll to the top of the page

Submit Response

After the Applicant ensures the document was uploaded correctly, the Request for Information response is submitted.

- Select the "Submit RFI Response" button at the top right of Grants Portal
- After the Applicant selects the "Submit RFI Response" button, a pop-up window appears.
- Steps to complete the Request for Information. The Applicant should:
- Select the blue "Yes" button from the pop-up window



Chapter 5

This chapter describes development of the scope of work and cost estimates for Standard and Specialized work in the Grants Portal. This chapter also covers the use of Grants Portal to monitor the approval process for scope of work and cost estimates.

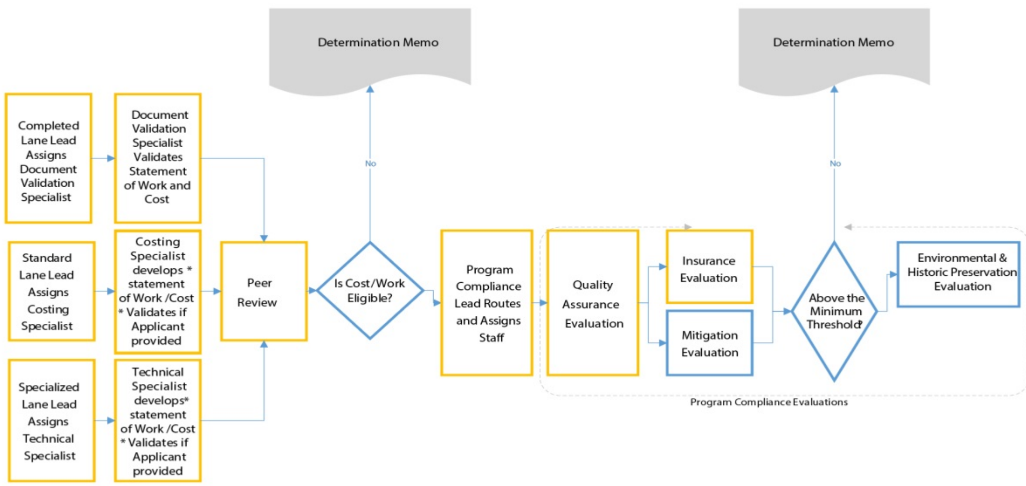
Upon completion of this chapter, participants will be able to:

Describe the key steps for developing the scope of work and cost estimate in the Grants Portal

Phase III: Scoping and Costing

This is Phase III of the Public Assistance process: Scoping and Costing.

The objectives are for either FEMA or the Applicant to develop and validate the project scope of work and cost estimates.



The Three Project Lanes

As mentioned in the previous chapter, the Public Assistance process segments projects into three lanes based on complexity.

- Completed Work Lane
- Standard Lane
- Specialized Lane

Projects in the Standard or Specialized Lane require the scope of work and cost estimate to be built. Either the Applicant or FEMA, based on the Applicant's decision, will write the scope of work and cost estimate.

The Consolidated Resource Center is a centralized location where subject-matter experts are available to process grant applications across multiple incidents. This is where FEMA reviews and creates a project's scope of work and cost estimate. Based on the review, FEMA determines eligibility. If the project is eligible, it moves onto Phase IV.

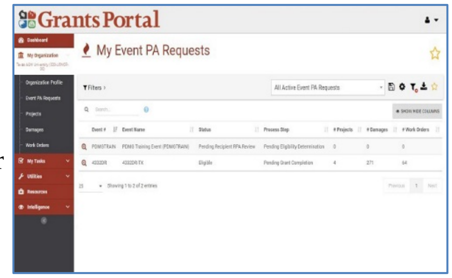
Completed Work

During Phase III of the Public Assistance process, the objective is to validate or develop the scope of work and cost estimate of a project based on codified damages. Pending grant obligation, no further actions are necessary for Completed Work during this phase. The Completed Work lane can cover all Categories of Work and may require site inspections, though generally they do not.

Standard and Specialized Work

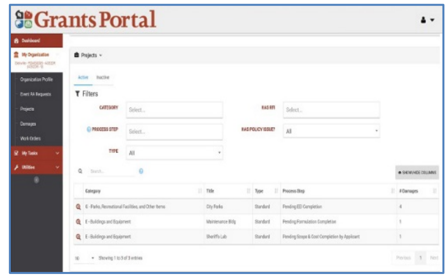
At the beginning of Phase III, the Applicant will decide between two choices for scoping and costing project(s).

- FEMA (via the personnel at the Consolidated Resource Center) will develop the scope of work and cost estimate based on the Damage Description and Dimensions on the Applicant's behalf
- The Applicant can choose to develop the scope of work and cost estimate themselves and submit to FEMA for review



In the case where the Applicant chooses to develop the scope of work and cost estimate, FEMA will validate both items and conduct a compliance review. Personnel from Environmental and Historic Preservation, Hazard Mitigation, and Insurance, will also conduct a review if necessary.

If additional information is required throughout project formulation, or during FEMA's review, the Consolidated Resource Center may process the Request for Information and the Applicant will receive a notification through the Grants Portal via email. The Applicant will be able to monitor the progress through the program compliance review process on the Grants Portal.

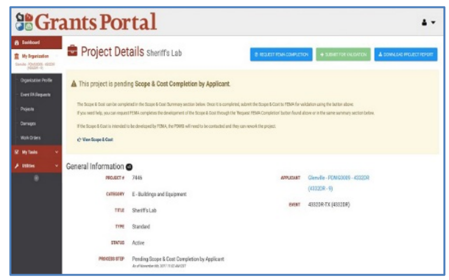


Applicant-Developed Scope of Work and Cost Estimates

The Applicant works in Grants Portal to develop the scope of work and cost estimate. If the Applicant chooses to develop their own scope of work and cost estimates for their project, there are certain considerations that should be kept in mind.

- Does the Applicant have a certified engineer or qualified cost estimator?
- Are documented local costs (unit costs) readily available?
- Are the recovery operations on a scale, where taking on scoping and costing is beyond capacity?
- Does the work require specialized expertise, factors, or considerations?

The answers to these questions may affect how the Applicant chooses to approach their scope of work and cost estimate development.



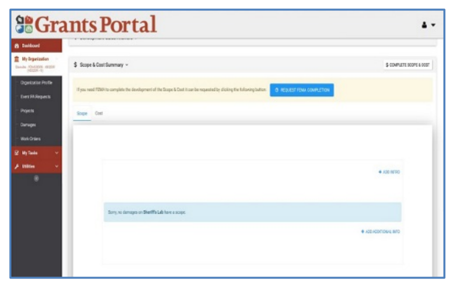
Navigate to the Project

To begin developing the scope of work, the Applicant navigates to the Organization tab in Grants Portal and completes the following steps:

- Select "My Organization"
- Select "Applicant Event Profiles"
- Select the magnifying glass next to the appropriate event

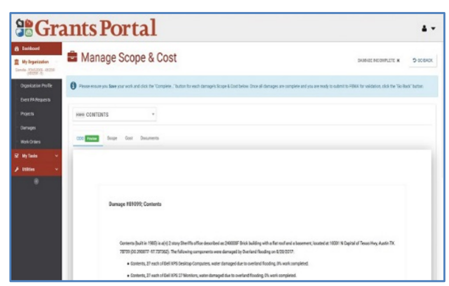
  Once the Applicant selects the magnifying glass next to the event, Grants Portal directs them to the "Applicant Event Profile" page.

- Select the "Expand Projects" drop-down list to expand it
- Select the magnifying glass to the left of the selected project



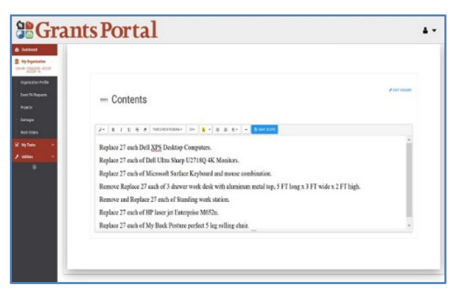
Project Details

Now the Applicant can view the Project Details in Grants Portal. Grants Portal displays a notification at the top of the screen stating, "This project is pending Scope & Cost Completion by Applicant."



Scope & Cost Summary

- Scroll down to the "Scope & Cost Summary" drop-down list
- Expand the "Scope & Cost Summary" drop-down list
- Select the "Complete Scope & Cost" button

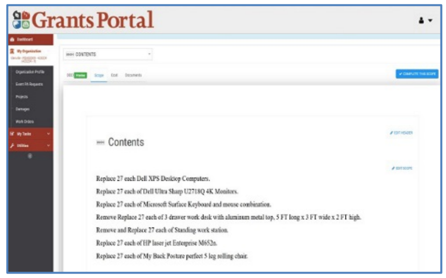


Manage Scope & Cost

Once the Applicant selects the "Complete Scope & Cost" button, Grants Portal directs them to the "Manage Scope & Cost" page.

- Select the "Scope" tab
- Select the "Add Scope" button

Enter Scope of Work

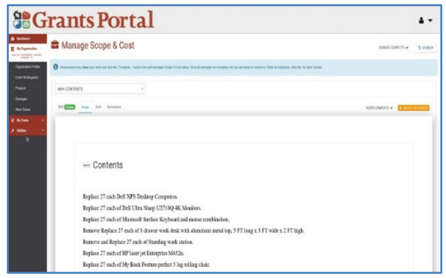


Now the Applicant is now able to enter the scope of work for the project in the text field.

- Enter the scope of work
- Select the "Save Scope" button

The Applicant should always be sure to save all their work when they are finished entering the pertinent information for the scope of work.

Review and Edit



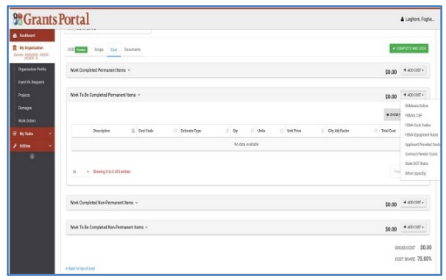
After entering and saving the scope of work, the Applicant completes the process of submitting their scope of work. The Applicant has two options: submit the scope of work or edit the scope of work if they see something is wrong.

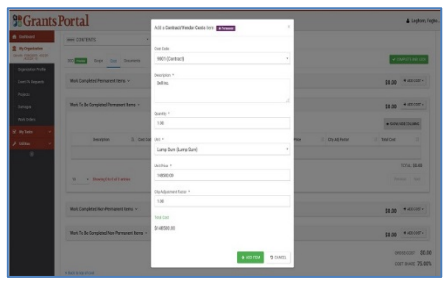
- Select the "'Complete this Scope'" button in the top right corner of the screen; or
- If any edits need to be made, select the "'Edit Scope'" button

  If the Applicant selected to edit their scope of work rather than submit it, they follow this next step the scope of work is updated by unlocking it, making the necessary changes, and repeat, then go through the process of submitting the scope of work again.

- Select the "'Unlock for Rework'" button
- Edit the scope of work
- Select the "'Save Scope'" button
- Select the "'Complete this Scope'" button

Add the Project Cost

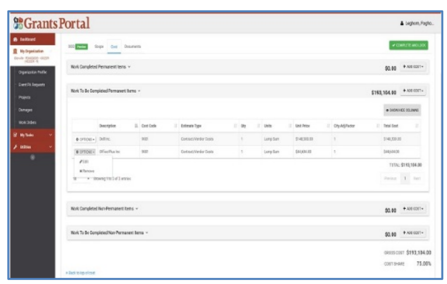




Adding the cost estimate is very similar to the process of adding a scope of work to a project. The Applicant adds the costs on the "Manage Scope & Cost" page, the same location where the scope of work was added.

- Select the "Cost" tab
- Expand the "Work to be Completed" drop-down list
- Select the "Add Cost" drop-down list
- Select cost source (e.g. FEMA Cost Codes, Applicant Provided Costs, Contract/Vendor Costs etc.)
- Select "Contract/Vendor Costs"

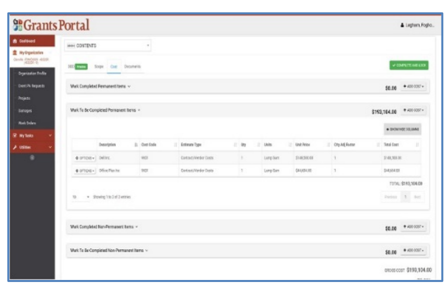
Enter Cost Information



After selecting the "Contract/Vendor Costs" a pop-up window appears. From the pop-up window, the Applicant can enter all relevant cost information.

- Select "FEMA Cost Code"
- Enter the cost description in the appropriate field
- Enter the quantity
- Select the unit
- Enter the unit price
- Enter the city adjustment factor (if applicable)
- Select "Add Item" at the bottom of the pop-up window

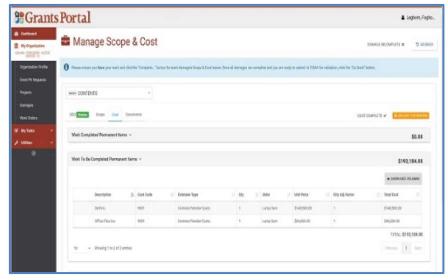
Edit or Remove a Cost Line Item



Once the Applicant selects the "Add Item" button, the pop-up window disappears. The Applicant also has the option to edit or remove costs instead of adding a cost.

- Select the "Options" drop-down list on the left side of the screen
- Select "Edit" or "Remove" depending on the necessary action

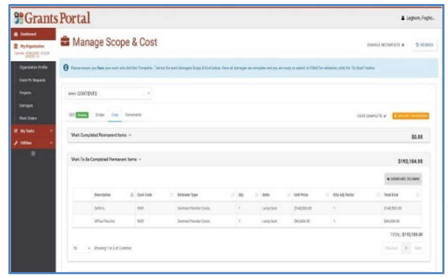
Scope and Cost



Once the Applicant completes all edits or removes unwanted costs, the costs are locked in.

- Select the green "Complete and Lock" button in the top right corner of the screen once ready

Manage Scope and Cost



The Applicant can make any last-minute changes to the cost estimate on the "Manage Scope and Cost" page.

- Select the orange "Unlock for Rework" button in the top right corner of the "Manage Scope & Cost" page
- Select the "Cost" tab
- Make the necessary changes
- Select the "Save Scope" button
- Select the "Complete this Scope" button

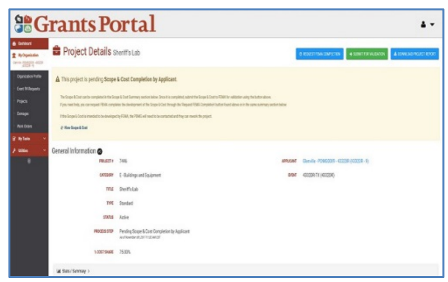
Finalizing and Submitting

Once all edits are saved the Applicant is ready to submit the scope and cost to FEMA.

- Select the "Go Back" button

  The previous step will bring the Applicant back to the "Project Details" page.

- To submit the scope and cost, select the green button in the top right corner of the screen labeled "Submit for Validation."

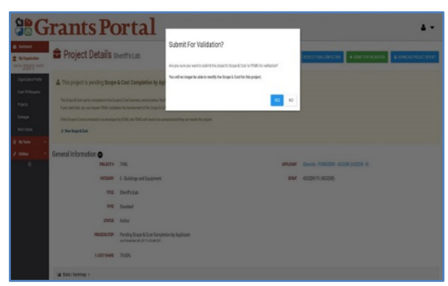
  The general project information such as the Project Number, Category of Work, Project Title and type, and status are visible in the screen. The Applicant should verify that these details are all correct, and if not, make the necessary edits.

- If everything is correct, select "Submit for Validation"

  After selecting on the "Submit for Validation", a confirmation window will appear on the screen. It will read, "Are you sure you want to submit the project's Scope and Cost to FEMA for validation? You will no longer be able to modify the Scope and Cost for this project."

- If ready to submit, select "Yes"

FEMA Review of the Scope of Work and Cost Estimate



After submitting the scope of work and cost estimate, FEMA will conduct a compliance review. If additional information is required throughout project formulation, the Consolidated Resource Center will process the Request for Information and the Applicant will receive a notification through Grants Portal via email.

Throughout the scoping and costing process, the FEMA Program Delivery Manager will continue to work with and support the Applicant. The Program Delivery Manager will coordinate with the Consolidated Resource Center personnel regarding project development.

The Program Delivery Manager is responsible for:

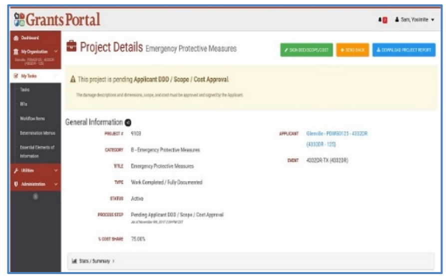
- Ensuring the correct documents (scope of work and cost estimate) are uploaded into Grants Portal
- Coordinating with Consolidated Resource Center personnel, sharing information and maintaining situational awareness
- Following up with the Request for Information documents requested to the Applicant
- Reviewing the draft scope of work and cost estimate
- Reviewing the project with the Applicant and discussing any edits

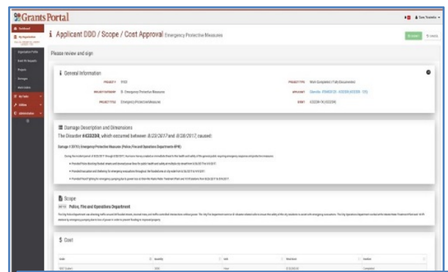
Recipient Review of the Project and Applicant Approval

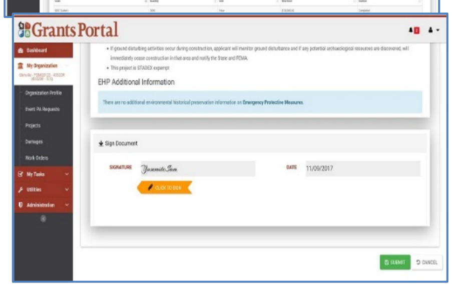
The Recipient will review the project (including the most important sections of the project such as the Damage Description and Dimensions, scope of work, and cost estimate) in Grants Portal. The Applicant will receive a notification when the scope of work and cost estimate are complete through Grants Portal via an email notification. The Applicant will review and electronically sign the scope of work and cost estimate in Grants Portal.

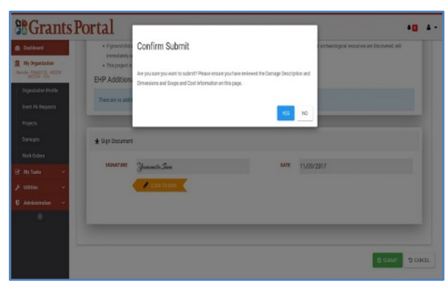
The following outline the process for reviewing and submitting a project with a complete scope of work and cost estimate.

Reviewing, Signing, and Submitting a Project









Signing

When the Applicant is notified that the scope of work and cost estimate require approval, navigate back to the "Project Details" section.

- Select the green "Sign DDD/Scope/Cost" button.
- Sign Document Bar

- The Applicant is now in the "Applicant DDD/Scope/Cost Approval" section, where they scroll down to the "Sign Document" bar.
- After the Applicant reviews the contents of the scope of work, cost estimate, and all other components of the project, select the button to sign and submit the project

  At the bottom of the section in the "Sign Document" bar, there is a text field where the Applicant types their name, the date of signature, and selects on the orange button labeled "Click to Sign"

  After selecting the "Click to Sign" button, the "Sign Document" pop-up window will appear.

- Enter the Applicant's full name in the "Print Name" text field
- Select the "Signature Style" from the drop-down menu
- Enter the Applicant's Grants Portal password
- Select the green "Sign" button at the bottom of the pop-up

Submit

The "Sign Document" bar should now contain the appropriate information.

If the Applicant is ready to submit the final project, select the green "Submit" button in the bottom right corner of the screen

After selecting the "Submit" button, the "Confirm Submit" pop-up window will appear.

- Select the blue "Yes" button to submit, or "No" in order to return to the project and make any final edits

  When selecting "Confirm Submit" the Grants Portal will state: "Are you sure you want to Submit? Please ensure you have reviewed the Damage Description and Dimensions and Scope and Cost Information on this page."

Best Practices

When reviewing, submitting, and signing a project in Grants Portal, the Applicant should use the following best practices to ensure everything is correct.

- Compare the Damage Description and Dimensions to the Scope of Work to ensure all items that were damaged are included in both areas even if the repair has been completed
- When reviewing the cost estimate, ensure all costs from the provided documentation are included in the cost estimate (e.g., freight/shipping, mobilization/demobilization, contract costs)
- Review any Hazard Mitigation Proposal and coinciding documents

If any items are not correct or included, the Applicant should notify and discuss the issue with their Program Delivery Manager immediately.

FEMA-Developed Scope of Work and Cost Estimate

If the Applicant chooses to have FEMA complete the scope of work and cost estimate on their behalf, FEMA will have the following responsibilities throughout the formulation process.

The FEMA Program Delivery Manager is responsible for:

- Meeting with the Applicant to achieve full document disclosure
  - Achieved through continued use of Essential Elements of Information
  - May be requested through the Request for Information process
- Assisting the Applicant with uploading supporting documents into Grants Portal
- Coordinating with Consolidated Resource Center personnel, sharing information and maintaining situational awareness
- Work to resolve the Request for Information sent to the Applicant
- Reviewing the draft scope of work and cost estimate
- Reviewing the project with the Applicant and discussing any edits

Once the project reviews are complete and the Program Delivery Manager concurs with the project, the Recipient Point of Contact is notified. Once the Recipient concurs on the project, the Program Delivery Manager approves the project and sends the project to the Applicant for review and concurrence in Grants Portal. The Program Delivery Manager will contact the Applicant to discuss the project.

Applicant Responsibilities under a FEMA-Developed Scope of Work and Cost Estimate

The Applicant is responsible for:

- Answering the Requests for Information by uploading the requested documentation in Grants Portal and notifying the Program Delivery Manager
- Reviewing the project and providing concurrence in Grants Portal
- Being proactive in communicating any issues with the Program Delivery Manager

If the Applicant wants changes made to the project, the Applicant will send the project back through Grants Portal and contact the Program Delivery Manager.

Chapter 6

The chapter describes the use of the Grants Portal to monitor the approval process for scope of work and cost estimates.

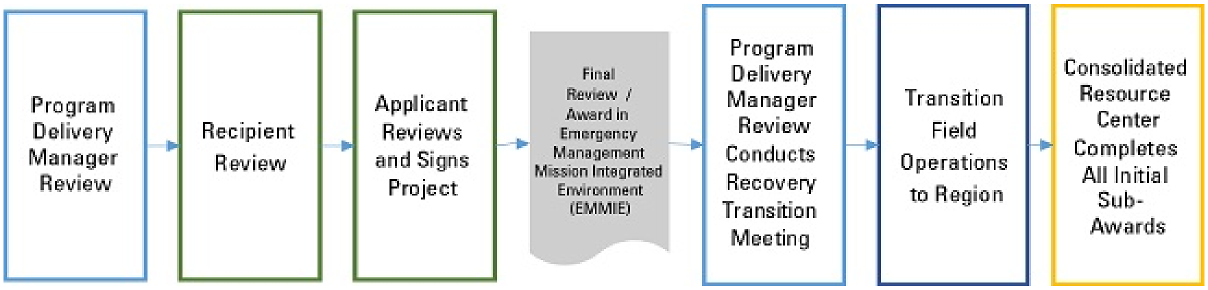
Upon completion of this chapter, participants will be able to:

- Explain the reviews and obligation processes in Emergency Management Mission Integrated Environment
- Define the reporting and monitoring process as it relates to Grants Portal

Phase IV: Obligation

This is Phase IV of the Public Assistance process: Obligation.

The objective is to obligate projects, complete the Recovery Transition Meeting with the Applicant, and transition Field Operations to the Region.



Note: All Projects are completed in EMMIE

Emergency Management Mission Integrated Environment (EMMIE) as the System of Record

EMMIE is the software that the Recipient will use to complete the process of the funding and approval of grants.

All information from Grants Portal including project documents will be copied and entered into EMMIE. Once all additional reviews, including Recipient review in this software, are complete, the project is then copied and transferred into Grants Portal for Applicants to be able to see the final version of the project prior to grant obligation.

The Recovery Transition Meeting

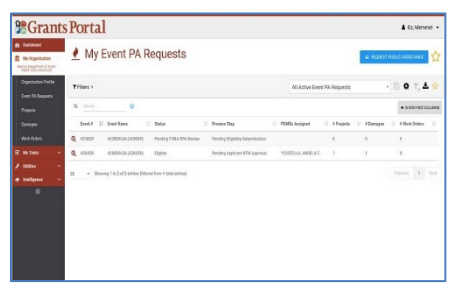
This phase is the conclusion of the Public Assistance process with FEMA and Applicant will be able to view the details of the Recovery Transition Meeting in Grants Portal. The Recipient and the Applicant should come prepared to the Recovery Transition Meeting to ask any last questions to the Program Delivery Manager.

Recipient Responsibilities:

- Coordinate with the Program Delivery Manager in order to attend the Recovery Transition Meeting
- Assist the Applicant by asking questions of the Program Delivery Manager
- Ensures all the required Recipient forms are completed

Applicant Responsibilities:

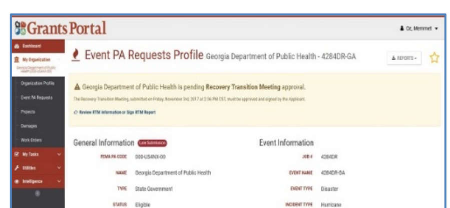
- Ask clarifying questions about the closeout process
- Identify audit requirements
- Ensure that all damages have been captured and placed into a grant
- Sign the Recovery Transition Meeting form during the meeting and then electronically sign in Grants Portal

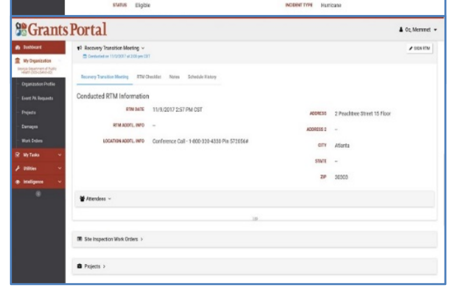


Signing the Recovery Transition Meeting

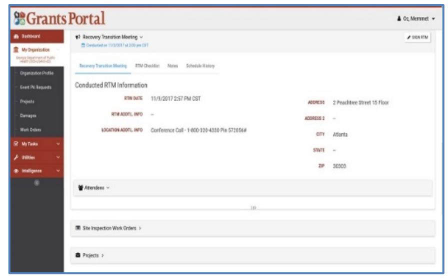
The following outline how to sign a Recovery Transition Meeting in Grants Portal. To start the process, navigate to "My Organization."

- Select "Event PA Requests" from the "My Organization" pane on the left side of the screen
- Select the magnifying glass to the left of the event





There will be a notification at the top of the section containing general information about the project. The notification will state that the project is "pending Recovery Transition Meeting approval."

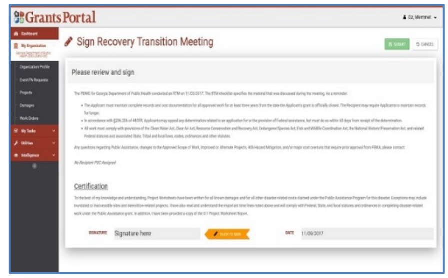


- Select "Review RTM or Sign RTM Report"

The Applicant is now able to view the "Recovery Transition Meeting" section. There are tabs across the top labeled:

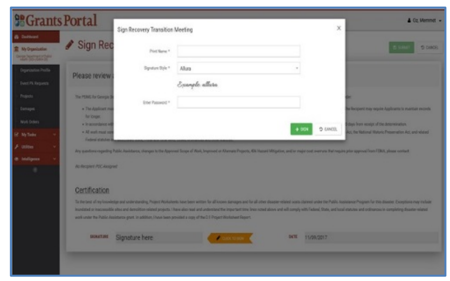
- "Recovery Transition Meeting"
- "RTM Checklist"
- "Notes"
- "Schedule History"

Instructions to review and verify the Recovery Transition Meeting:



- Select each of these tabs to review and verify that the information provided is correct
- After verifying that the information contained in all four tabs is accurate, the Applicant selects the "Sign RTM" button on the top right corner of the screen.

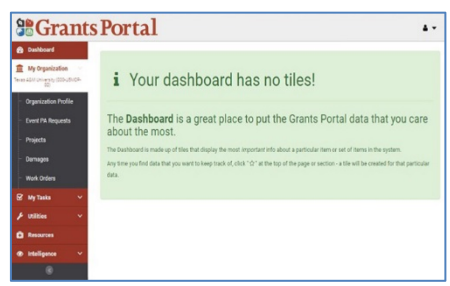
After selecting the "Sign RTM" button, the "Sign Recovery Transition Meeting" page will appear and a summary of the Recovery Transition Meeting details will be at the top of the page. There will also be reminders for the Applicant regarding how to reach the Program Delivery Manager. The Program Delivery Manager upon the completion of the Recovery Transition Meeting, will answer questions in the Grants Portal based on the information from that meeting. The Program Delivery Manager will then send via Grants Portal the information to the Applicant to sign.



- After reviewing the information, the Applicant selects the orange "Click to Sign" button at the bottom of the page to sign the Recovery Transition Meeting

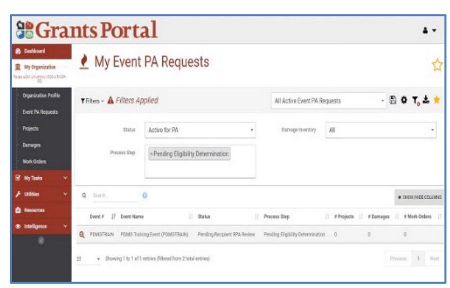
After selecting the "Click to Sign" button, a pop-up window will appear. There is a series of fields that must be completed with the following information.

  - o Type the Applicant's name
  - o Select the desired font style for your signature
  - o Enter the Grants Portal password
  - o Select the green "Sign" button
  - o Once the Applicant has signed the Recovery Transition Meeting, the pop-up box will close, and Grants Portal will return to the "Sign Recovery Transition Meeting" page.
  - o Once ready, the Applicant can select the green "Submit" button in the top right corner of the screen



Customizing the Grants Portal Dashboard

The Dashboard in Grants Portal is easily customizable, so the Applicant and Recipient will be able to quickly locate and access different parts of the system. Tiles serve as shortcuts to data that the Applicant or Recipient wish to access quickly.



Creating Tiles

- The Applicant/Recipient logs into Grants Portal and navigates to "Applicant Event Profiles."
- Select the "Filters" arrow to expand it and filter the items to create the tile
- Select items to be filtered
- Select the yellow star icon in the top right corner of the "Filters" arrow

Selecting the yellow star icon will result in creating a tile on the Dashboard. When the Recipient/Applicant navigates back to the Dashboard the new tile will appear.

Creating Widgets

Widgets are applications or components of an interface, that enable a user to perform a function or access a service.

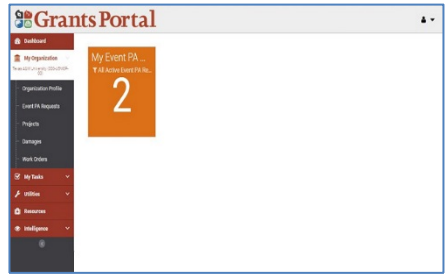
Applicants and Recipients can locate and add widgets to their dashboard by navigating to the task pane on the left side of the dashboard.

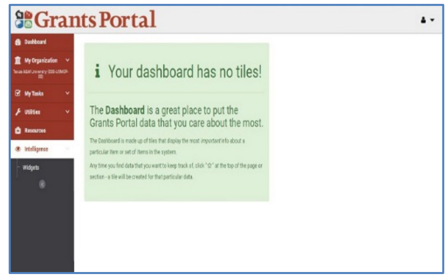
- Select "Intelligence"
- Select "Widgets"
- On the "Widgets" page, the Recipient can view the complete list of widgets available.
- Select the green "Add to Dashboard" button

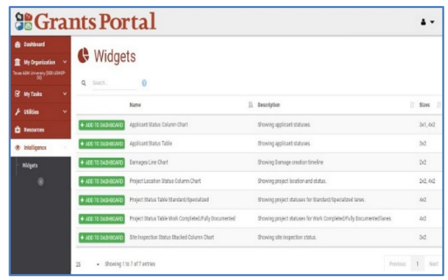
After selecting the green "Add to Dashboard" button, the "Select Widgets" pop-up window will appear.

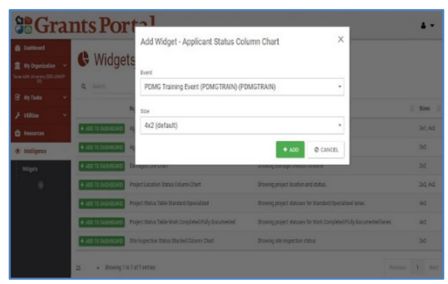
- Select the event from the drop-down list
- Select the Widget size
- Select the green "Add" button

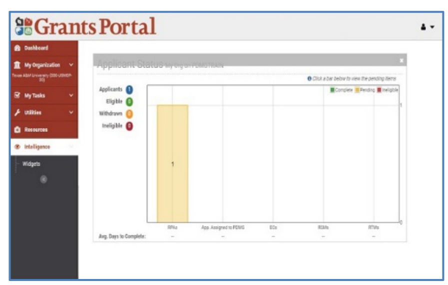
The Applicant or Recipient navigates back to the Dashboard in order to view and confirm the creation of the new widget.











Exporting Information from Grants Portal

There are no printing capabilities in Grants Portal, however, it is possible to export information when there is an option to download certain components/documents.

Grants Portal Hotline

Technical assistance is available through the Support Helpline at 866-337-8448.