



The New Grant Management System

How to Complete Phase 1 of the Grant Process

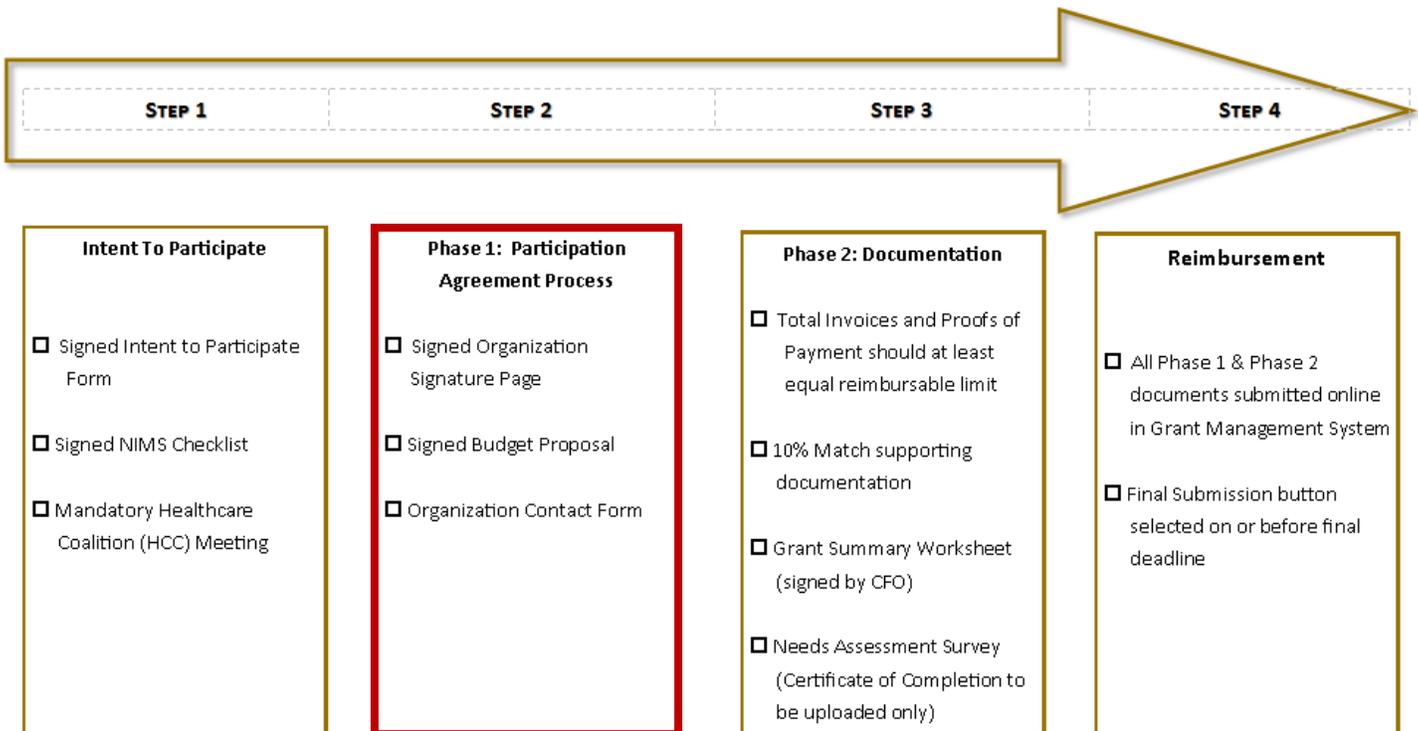


User Guide Version 4
September 2015

Introduction

This lesson walks the average hospital or EMS user through Phase 1 of the new Hospital Preparedness Program (HPP) grant year and process. This first phase consists of submitting the Participation Agreement (PA) and other required documents to the Hospital Preparedness Program (HPP) Grant staff so that funds can be spent against that PA.

The Overall Phase 1 Process



Accessing New Grant Management System

Go to LHA-foundation.org, click the ESF-8 Portal logo on the Emergency Preparedness page to link to the main login screen.



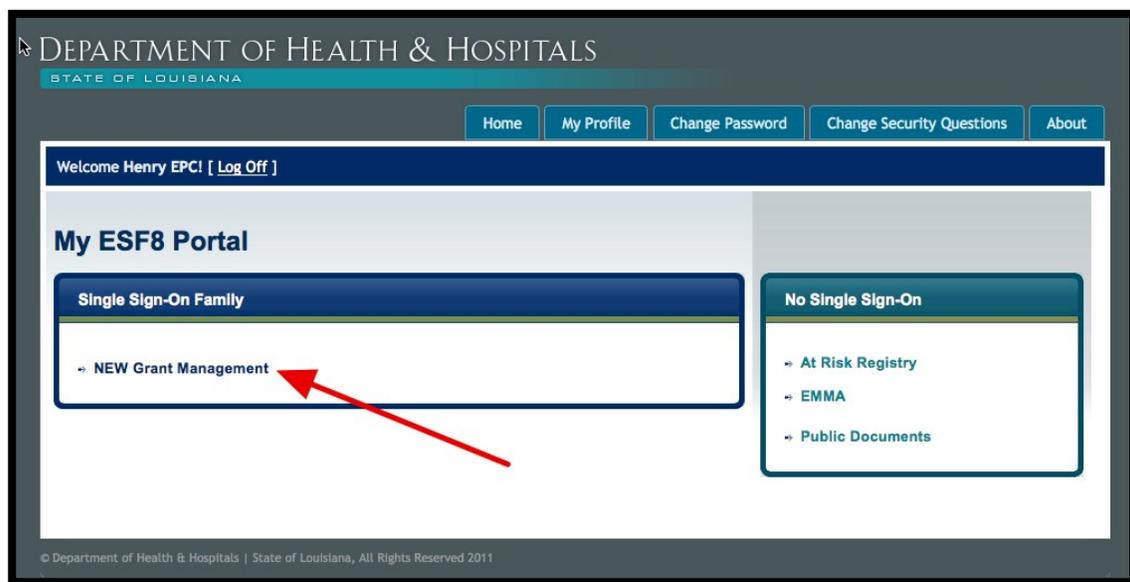
BEFORE GETTING STARTED

The New Grant Management System is included as part of the single sign-on section of the ESF 8 Portal. As with other ESF 8 applications, you will need the **Microsoft Silverlight™** plug-in for Internet Explorer or any other browser your facility uses. If you or your facility's IT staff need assistance with this process, please email esf8help@la.gov, and we will assist you in getting the access you need.

ACCESSING GMS

To access GMS, you will need to log on to the ESF 8 Portal. A quick link to the Portal is at the bottom of the LHA homepage. Click on the box labeled "ESF-8 Portal". Once the link is clicked, you will be brought to the login page of the ESF-8 Portal. If you do not have a username and password, you will need to contact your Facility Point of Contact or the LHA Hospital Preparedness Program (HPP) Grant Staff at 225-927-1228.

The ESF 8 Portal Home Page



The Facility Dashboard



The dashboard shows the current grant information i.e. the status, reimbursable limit, obligation amount, and a link to the Participation Agreement documents. Select the "Grant Detail" button to see additional grant details. (Be sure the current year's grant is highlighted first).

Step 1: The Participation Agreement

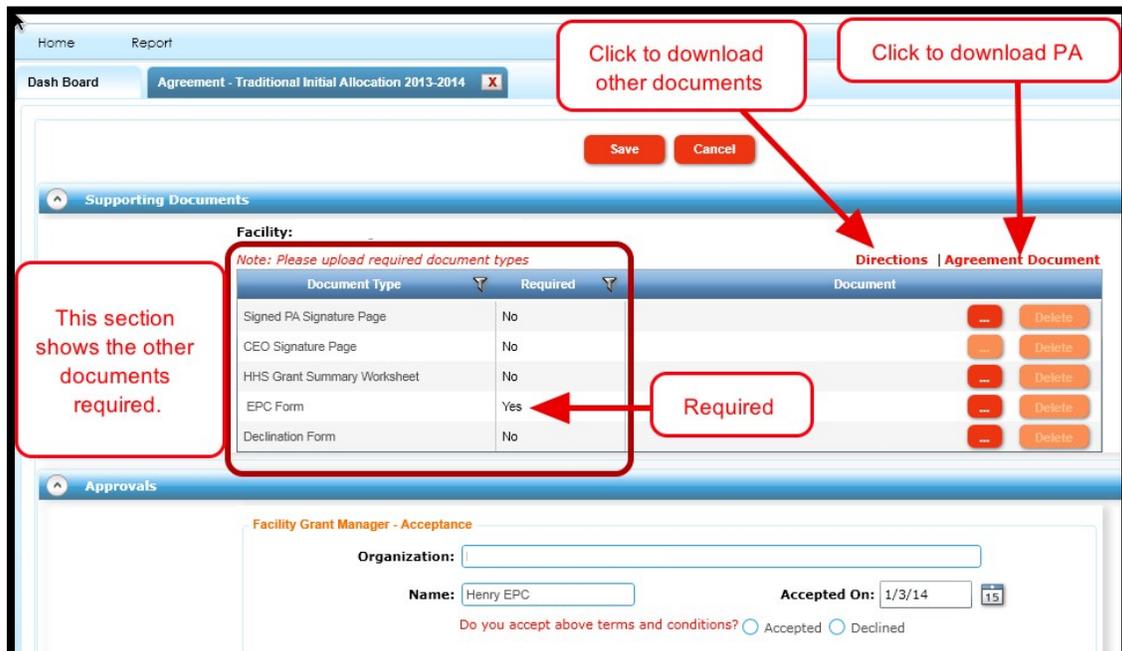


To participate in the grant program, you must submit a signed Participation Agreement both electronically along with a hard copy.

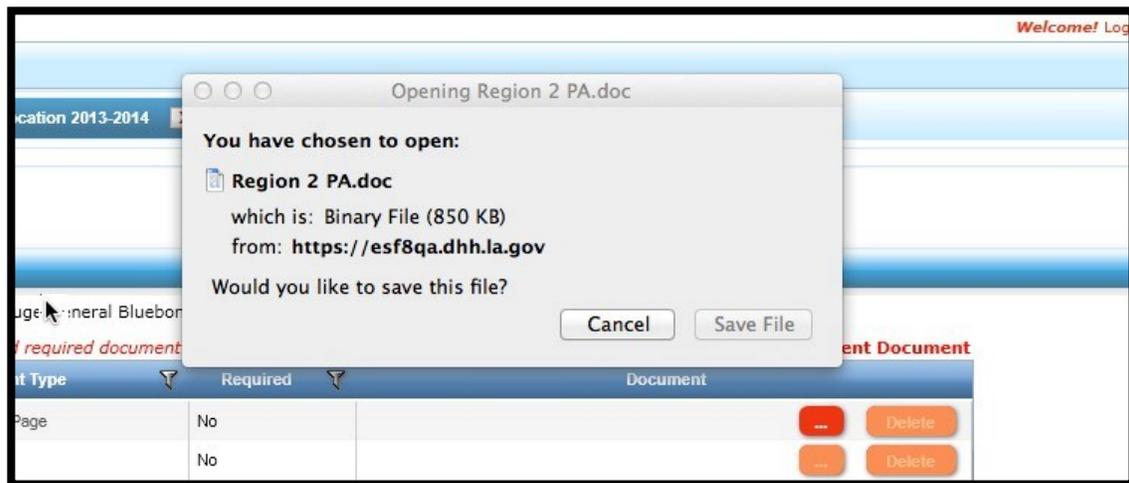
1. Click "Agreement Document" to obtain a copy of the signature page to print and upload into the system.
2. Mail a physical copy of the signature page of the Participation Agreement to LHA via postal mail.

To download a copy of your facility's Participation Agreement, click on "**Agreement Document**" on the Dashboard screen. If your facility is eligible to receive grant funds, the status is labeled "**New Allocation**". Additional documentation will be required. Check the *Supporting Documents* box to see what documentation is required in order to proceed. By clicking "Directions", the user can download blank copies of additional required documentation.

Downloading the Document(s)

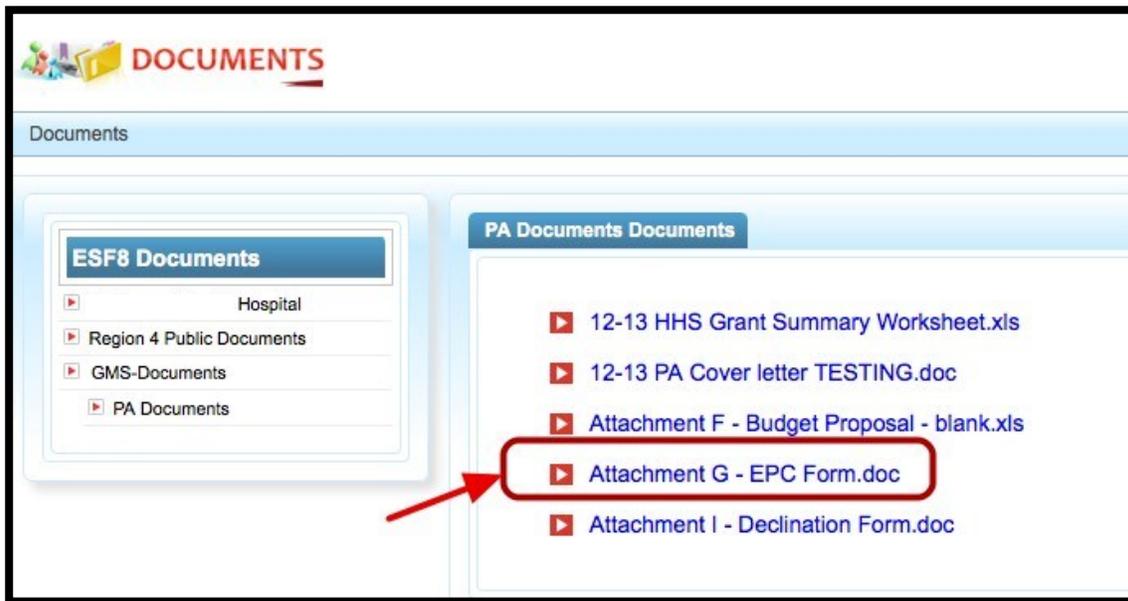


Saving the PA Document to Your Computer



After clicking the "Agreement Document" link, the computer will prompt users to save the file to the hard drive. On some machines, this will default to your Downloads folder.

Getting other Documents Needed



After you click on the "Directions" link, the application will open to the Document Portal where you can select any documents to download. Click on the link for the document needed. In our example, we want to click on the "Attachment G --- EPC Form.doc." You may have the option to Save or Open the document.

Open the Participation Agreement Document and Review

Health and Human Services (HHS) Hospital Preparedness Grant 2013-2014 (Round 11) Participation Agreement	
Region 2 Hospitals	
<p><i>*Any costs submitted by your facility over the Total Obligation Amount may be used to satisfy Louisiana's HHS match requirement for the Administrative Designated Regional Coordinator (ADRC) positions and/or regional projects. Therefore, any match/overage your facility submits cannot be used for any other federal grant or procurement contract or any other federal or state reimbursement.</i></p>	
*TOTAL OBLIGATION AMOUNT:	\$23,221.06
Reimbursable Limit:	\$23,197.86
Match Amount (0.10%):	\$23.20
Hospital Name:	Test Hospital
Hospital CEO:	
Hospital Type:	T-1
Designated Regional Coordinator (DRC):	Norris Yarbrough,
Designated Regional Coordinator (DRC):	Denice Eshleman,
Coordinator (ADRC):	Cynthia Davidson,

In order to participate in the grant program, this Participation Agreement and Budget Proposal must be signed and returned, along with the enclosed Emergency Preparedness Contact (EPC) Form to the Louisiana Hospital Association, Research & Education Foundation by **DATE 2012**. The signed Participation Agreement, signed Budget Proposal, and EPC Form may be faxed to: (225) 927-1230.

The PA document downloaded will be prepopulated with facility and grant specific information using each Region's particular template. This example shows a sample page one with grant information merged into the PA.

Print the Signature Page

SIGNATURE PAGE		
<p>DIRECTIONS: Please sign and return this page only! This signature page must be completed and uploaded into the electronic Grant Management System (GMS) on or before DATE. If you fail to upload this page and the supporting documents mentioned below into the GMS by DATE, your facility will forfeit the grant funds.</p>		
<p>AGREEMENT STATEMENT AND RECEIPT DEADLINES: VERY IMPORTANT! By signing below, your hospital agrees to spend the HHS grant funds as mentioned in their 2012-2013 HHS Participation Agreement and as listed on your budget proposal. Approved Acceptable Documentation of Proof of Payment must be dated from July 1, 2012 to May 31, 2013. Expenditures before or after this time period are NOT allowable purchases. In addition, your hospital agrees to submit the following to the Louisiana Hospital Association Research and Education by one of the documentation dates below but no later than May 31, 2013:</p>		
DOCUMENTATION DEADLINES		
March 30, 2013	April 30, 2013	May 31, 2013
<ul style="list-style-type: none"> HHS Grant Summary Worksheet – signed by the CFO; Acceptable Documentation of Proof of Payment – dated from July 1, 2012 to May 31, 2013; and HHS Grant Survey - submitted online using the survey module in the ESF 8 Portal. 		
Organization:		
Chief Executive Officer:		
Phone/Fax/Email:		
Signature:		
Date:		
<p>Please fax this form along with the items listed below to (225) 927-1230 or mail to HHS Grant Program; LHA Research & Foundation; 9521 Brookline Avenue; Baton Rouge, LA; 70809 by DATE 2012.</p>		
<ol style="list-style-type: none"> Signed 2012-2013 Participation Agreement; Signed Budget Proposal; Emergency Preparedness Contact (EPC) Form; and Letter to support changes in administration w/effective dates OR letter providing signature authorization (if someone other than the CEO signs Participation Agreement), if applicable. 		
<p>***LHA must receive all 3 items (including item 4, if applicable) before the 2012-2013 Participation Agreement will be approved.***</p>		
<p><i>Thank you for your participation in the HHS program!</i></p>		

- If the prepopulated information in the document is correct, navigate to the last page, print it out and obtain the facility's signatures.

- Follow this same procedure for any other Required Documents (edit, fill in requested information, get signatures, etc.)

Uploading Required Supporting Documents

Facility: Baton Rouge General Bluebonnet

Note: Please upload required document types

Directions | Agreement Document

Document Type	Required	Document
Signed PA Signature Page	No	... Delete
CEO Signature Page	No	... Delete
HHS Grant Summary Worksheet	No	... Delete
EPC Form	Yes	... Delete
Declination Form	No	... Delete

Select the “...” button seen above to attach and upload the documentation. Be sure all documents you intend to upload are saved in a folder familiar to the user.

After the Upload

Note: Please upload required document types

Directions | Agreement Document

Document Type	Required	Document
Signed PA Signature Page	No	Region 2 PA-SignaturePage.pdf ... Delete
CEO Signature Page	No	... Delete
HHS Grant Summary Worksheet	No	... Delete

As documents are successfully uploaded, they will appear in blue as attachments. The user can review the documents uploaded for each corresponding document type listed.

Final Step - Accepting the Agreement

The Next section is the *Approvals* section, where the Grant Manager will electronically accept the grant on behalf of the organization. Select the radio button. At this time, an organization may also Decline the grant (see details on the next page).

Approvals

Facility Grant Manager - Acceptance

Test Hospital

Name: Henry EPC Accepted On: 1/3/14

Do you accept above terms and conditions? Accepted Declined

Administrative Purposes Only: Do not complete below sections.

Grant Staff - Verification

Organization:

Name: Updated On: <M/d/yy>

Verified Need More Info Forfeited

Managing Agency - Final Approval

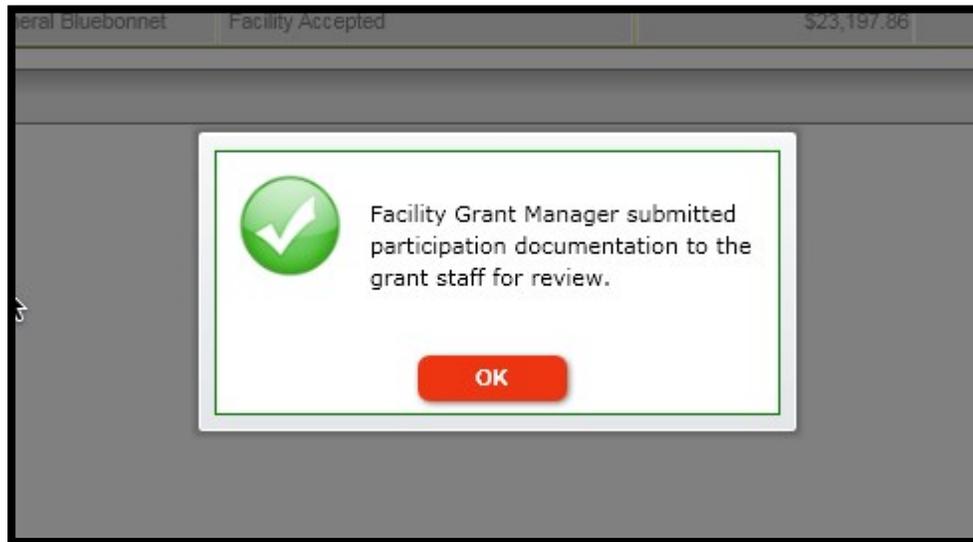
Organization:

Name: Approved On: <M/d/yy>

Do you accept above terms and conditions? Approved Declined

Click "Save" Save Cancel

Confirming Success



After clicking "Save", and all information required is successfully uploaded, users will see this pop-up window. The LHA Hospital Preparedness Program Grant Staff will review documentation and approvals.

Declining Grant Funds

A screenshot of a web form titled "Facility Grant Manager - Acceptance". The form contains several fields: "Organization:" with the value "Test Hospital", "Name:" with the value "Henry EPC", and "Declined On:" with the value "1/3/14" and a calendar icon. Below these fields is a question: "Do you accept above terms and conditions?" with two radio button options: "Accepted" and "Declined". The "Declined" option is selected. A red arrow points to the "Declined" radio button. Below the question is a note: "Note: Please upload supporting declination document in the above section." Below the note is a "Comments:" field with a text area containing the text: "If you choose to decline, you are presented with instructions on how to proceed." A red arrow points to the "Comments:" field.

If your facility does not wish to participate and accept grant funds, you must complete and upload a Declination Form. The Declination Form can be found in the "Directions" link with the other supporting document templates. Once you select "Declined", your facility will no longer be able to access the funds.

Additional Helpful Features of the New Grant Management System

Grant Detail Screen

The screenshot displays the Grant Detail Screen with three main sections:

- Grant Information:** Reimb Limit: \$23,197.86, Match Amt: \$23.20 (0.10 %), Total Obli Amt: \$23,221.06, Cash Amt Spent: \$0.00, InKind Amt Spent: \$0.00, Total Amt Spent: \$0.00, Declined Amt: -N/A-, Total Obli Amt Remaining: \$23,221.06
- Status Update:** Status: Facility Accepted. A table shows the progress of the grant in the approval process.
- Agreement:** Agreement Start Date: 7/1/13, Agreement End Date: 2/10/14, Documentation Start Date: 7/1/13, Documentation End Date: 4/30/14

Accepted By Facility	Pending Approval	Documentation Submitted	Documentation Approved	Check Date
1/3/14				

On the Dashboard, you have an option titled "Grant Detail". You can click this button to get a detailed look at your grant information:

1. The Grant Information section shows the financial details of your grant.
2. The Status Update section shows the progress of your grant in the approval process
3. The Agreement section shows the relevant dates for your grant.

You can click the "Close" button to return to the Dashboard view.

Comments

The screenshot shows the Dashboard with a search bar and a table of grants. A red arrow points to the "Comments for EPC (Grant Manager)" button. The table below shows the details of the selected grant.

Grant	Facility Name	Status	Reimb Limit	Obligation Amount	Agreement Document
Initial Allocation Traditional 2013-2014		Facility Accepted	\$23,197.86	\$23,221.06	Agreement Document

There are other options in the application that you can access during the LHA approval process. For example, you can send a message to the Grant Staff if needed by clicking on the "Comments for EPC (Grant Manager)". This will allow you to message specific or all staff at LHA about any grant issues or questions you have. You can also access reports to get detail on your grant allocation.

Accessing Electronic Copies of Documentation for Phase 1

The screenshot shows the 'GRANT MANAGEMENT' interface. At the top, there are 'Home' and 'Report' tabs, with 'Report' circled in red. Below the navigation bar, there's a 'Participation Agreement Report' section. On the left, there's a sidebar with 'Participation Agreement', 'Documentation', and 'Status'. The main content area has several filter sections: 'Grant Years' with checkboxes for --All--, 2015-2016, 2014-2015, 2013-2014 (checked), and 2012-2013; 'Sub Grants' with a radio button for 'Initial Allocation Traditional 2013-2014'; 'Facility Types' with checkboxes for --All-- and Hospital (checked); 'Regions' with checkboxes for --All-- and Region 2 (checked); and 'Facilities' with a dropdown menu showing 'Region 2'. A red arrow points to a 'Generate Report' button on the right.

Select the "Report" tab at the top left-hand side of the screen. Click on "Participation Agreement" and select the information requested in each section. Your facility name should appear in the *Facilities* box.

Saving the Electronic PA Report

The screenshot shows a confirmation dialog box in the center of the screen. The dialog box has a yellow question mark icon and the text: 'Report generated successfully. Do you want to save the document?'. Below the text are two buttons: 'Yes' and 'No'. A red arrow points to the 'Yes' button. In the background, the 'Generate Report' button is visible, and the 'Facility Types' section shows 'Hospital' selected.

After clicking the "Generate Report" button, the application will assemble the file. Click "Yes" to save the document to your local machine. This PDF file will be a compilation of all the documents submitted in this Phase, including any comments.

NOTE: The application packages your download in a compressed file format known as a "zip" file generally due to the large size. You may have to save the document prior to unzipping and opening the file.