



## Grant Tracking Module

This guide walks you through the Grant Tracking Module which includes entering/updating grant awards and entering review/monitoring data.

Contact VISION Finance Support at 828-6700 option 2

**State of Vermont**  
**Department of Finance & Management**

**February 2024**

## Revisions to Manual

### February 2024

- Updated for PeopleTools 8.6 upgrade

### December 2018:

- Manual written

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# Grant Tracking Module Overview

## History

In 2003, Bulletin 5 - *Single Audit Policy for Subgrants* was issued by the Secretary of Administration. This bulletin set forth requirements and procedures for State of Vermont agencies and departments to follow in accordance with Office of Management and Budget (OMB) Circular A-133 to manage and monitor Federal grants they issued. In conjunction with this bulletin, the Department of Finance and Management implemented the Subrecipient Grants module as a customized module in the VISION system as a means of tracking Federal subrecipient grant awards and monitoring requirements to ensure compliance with Circular A-133 and Bulletin 5.

In 2006, Bulletin 5.5 – *State Grant Monitoring Policy* was issued by the Secretary of Administration. This policy set forth policies and procedures to be used by State of Vermont agencies and departments to follow when issuing grants of State funds.

In 2009, Act 19 was passed which requires the Department of Finance & Management to issue reports of Federal and non-Federal grants issued. This act required an annual report of Federal grants issued to be published no later than January 31, 2010 and a report of all grants issued to be published no later than January 31, 2015 and annually thereafter.

In 2010, Acts 68 and 146 required the State of Vermont to increase the number of state-funded grants and contracts that contain performance measures. Our ability to track and report the number and percentage of contracts containing performance measures was met in 2010 with modifications to the Contract Module. Compliance for grants required modifications to the Subrecipient Grants module which were implemented in July 2011 (see below). The legislature's commitment to the use of performance criteria to achieve desired outcomes was reaffirmed in 2014 under Act 186.

Also in 2010, the Federal Funds Accountability and Transparency Act of 2006 (FFATA) went into effect which requires recipients of Federal funds to populate a Federal database with information about Federal grant awards they issue. In 2014, the Digital Accountability and Transparency Act (DATA Act) was passed by Congress to expand upon the Federal Funding Accountability and Transparency Act. Full implementation of the DATA Act was delayed and in 2017 a pilot phase began at the federal level.

In July 2011, the original VISION Subrecipient Grants module was replaced with the VISION Grant Tracking (GT) module. The Subrecipient Grants module allowed entry of only Federally funded grants while the GT module allows for the entry of non-Federal grants, identifies grants with performance measures, identifies awards subject to FFATA reporting, and facilitates compliance with the state and federal grant issuance and reporting requirements described above. In FY2012, use of the GT module provided a means for compliance with performance reporting as required in Acts 68 and 146 as stated above.

On December 26, 2013, OMB issued *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)* to replace seven existing circulars, including Circular A-133. The Uniform Guidance went into effect for states on December 26, 2014 and it contains numerous requirements that added or modified how states must issue Federal awards. To meet these new requirements, The Secretary of Administration issued a new version of Bulletin 5 – *Policy for Grant Issuance and Monitoring* which was also effective on December 26, 2014. This bulletin consolidated the previous Bulletins 5 and 5.5 into a single comprehensive grants policy and incorporated the new and

modified requirements of the Uniform Guidance. Although these new regulations necessitated numerous changes to issuance and monitoring policy and procedures, the State of Vermont was able to continue to utilize the GT module itself to document grant awards and monitoring activities with only slight modification.

## **Current Environment**

The Grant Tracking module went live in 2011, was slightly modified in FY2016 and was modified again as part of the VISION v9.2 Upgrade Project in FY2019. It serves two primary functions:

- 1) To document all grant awards issued and identify those that contain performance measures.
- 2) To document subrecipient monitoring activities, especially Single Audit review activities.

Award functionality is found on the [Award page](#). It provides a central database where all grant awards are entered by departmental grants staff. The awards entered here become the basis for fulfilling annual reporting requirements including those in statute and those related to the Comprehensive Annual Financial Report (CAFR). They also provide the basis for identifying which subrecipients require a single audit which is a requirement of the Uniform Guidance. The FY2019 module modification added functionality that allows for a copy of the grant agreement document to be attached to each award entry.

Subrecipient Monitoring functionality is found on the [Review page](#). It provides a centralized database in which to document which subrecipients require a single audit and to document review of single audit reports. The FY2016 module modification added functionality that allows for a copy of the Subrecipient Annual Report to be scanned and attached to each year's record. This makes a copy of the report filed by the subrecipient available to all users.

Activities in the module are divided between those carried out by departmental end-users and those carried out by Finance & Management. Access to the GT Module is restricted to certain users through VISION system security. The exercises in this manual describe the activities performed by departmental end-users only. Those activities performed by Finance and Management are restricted to users with Finance and Management level security and are not covered in this manual.

## Grantee Policies and Procedures

The following documents contain the state requirements pertaining to grantee monitoring including the official policies and other guidance issued by the Department of Finance & Management:

[Agency of Administration Bulletin #5: Policy for Grant Issuance and Monitoring](#) - Effective December 26, 2014

[Bulletin 5 Supplement-Granting Plan Guidelines](#) - Guidance for departments' granting plans

[2009 Act 19](#) – An act requiring the Dept. of Finance & Management to publish reports of grants issued

[2010 Act 68](#) and [2010 Act 146](#)- Challenges for Change and Implementation of Challenges for Change

[2014 Act 186](#) – Program-Level Performance Measure Reporting

[Bulletin 5 Procedures](#) – Procedures pertaining to Bulletin 5 issued by the Department of Finance and Management

## Grants Process

### Procedures for All Grants:

- Granting agencies/departments must determine a potential grantee's eligibility for a grant award by querying the GT module as outlined in Bulletin 5 Procedure #1.
- Once deemed eligible, the granting agency/department must issue the grant award in the proper Bulletin 5 format using Grant Agreement Parts 1 and 2.
- Once the award is issued, it must be entered in the Grant Tracking Module within 10 days after grant execution following the procedures outlined in this training manual.

### Additional Federal Grant Processes:

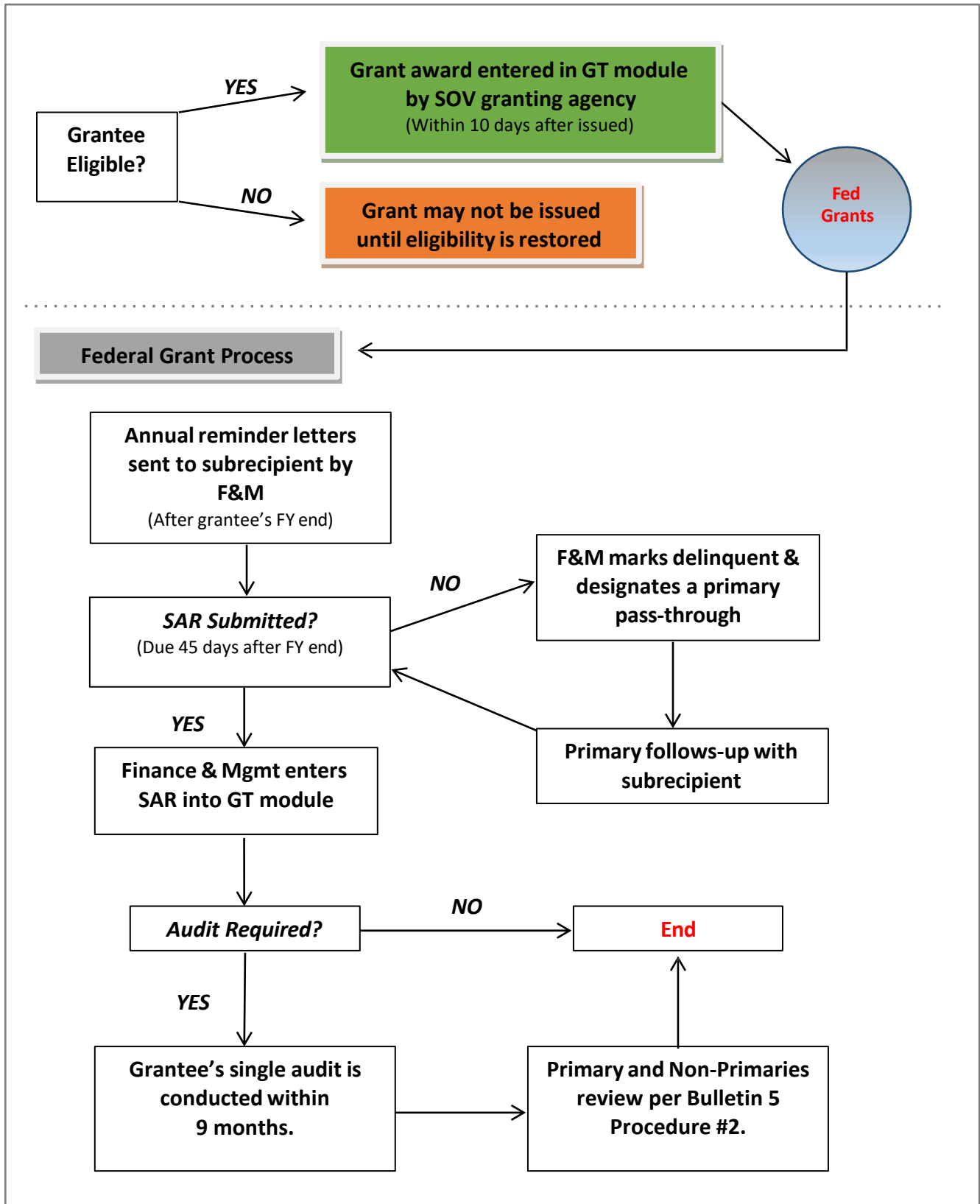
- Monthly, the Department of Finance & Management generates letters to all grantees whose fiscal year ended in the prior month. These letters request that they submit the Subrecipient Annual Report to Finance & Management within 45 days after the end of their fiscal year.
- Completed reports are entered in the GT Module by Finance & Management who also designates the Primary pass-through business unit.
- Delinquent subrecipients become ineligible for future grant agreements until the delinquency is resolved and it becomes the responsibility of the Primary pass-through entity to follow-up with the subrecipient to bring them into compliance.
- If a single audit is required, the subrecipient must complete their audit report and make it available to SOV granting agencies within 9 months.
- The primary pass-through business unit must coordinate and document review of single audit reports in accordance with Bulletin 5 Procedure #2. Single audit review must be completed within 6 months after the audit report was completed in order to meet Federal requirements.

### Reporting Processes:

- Reports of grants with and without performance measures will be generated by the Dept. of Finance & Management and submitted to the Vermont Legislature periodically as required.
- Grant balance information is reported by each business unit on the CAFR-7 form as part of the Comprehensive Annual Financial Report each year.
- An annual report of grant awards issued is produced and published on the Dept. of Finance & Management website in January of each year.
- Granting agencies can run various queries of data in the GT module at any time in order to assist them in their grants management activities.

Refer to the [Grant Guidelines](#) page of the Finance & Management website for related procedures and information pertaining to grant issuance and monitoring.

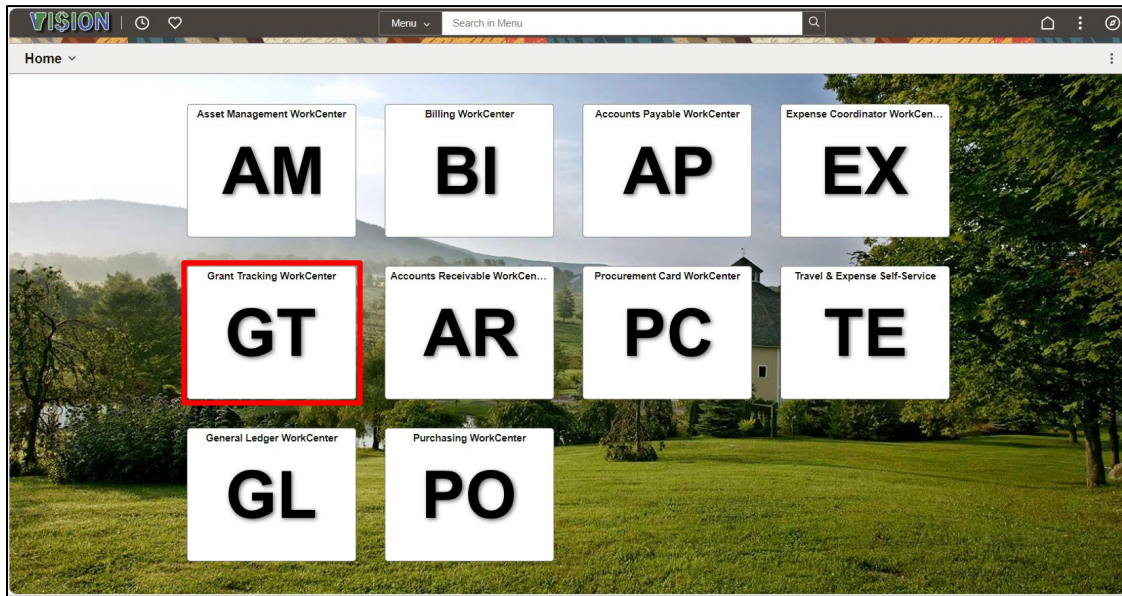
## Grant Process Flow



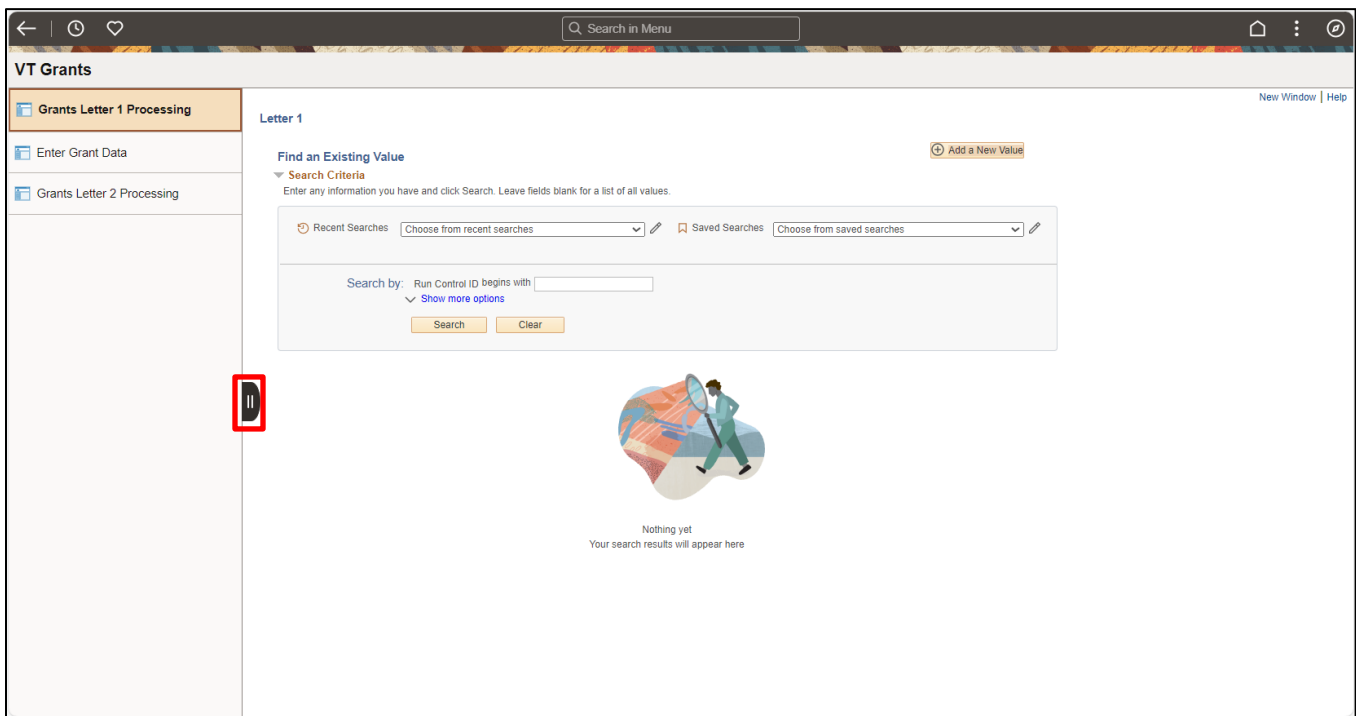


## Grant Tracking WorkCenter

Log in to VISION and Click the **Grant Tracking WorkCenter** tile on the Home Page:



Click the **Tab** to collapse and expand the left-side menu:



The Grant Tracking Module contains 2 pages: Award and Review. All data in the module is organized by Supplier ID (Supplier Number) using the same supplier number as other modules. This module will only allow entry for active suppliers which must be set up before data entry can occur in this module.

Grant Awards Page

AwardReview

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActiveSEARCH

Grantee Supplier ID: 0000006962Supplier name: Child Care ResourceFederal Grantee Fiscal Year End Month: 6

Award Information

Find | View AllFirst1 of 1Last

Business Unit:BU Name:

GrantActiveGrant contains performance measures?YesNo

#:

Start date:End Date:Issued Date:Date entered: 01/05/2024

Grant Title/Description:

\*Address: 300 Cornerstone Drive, Suite 128

City: WillistonState: VTZip: 05495

BU Contact Name:Phone:

General Comments:

Total Amount:0.00

Grant Lines

Find | View AllFirst1 of 1Last

\*Fund Type\*AmountALN S.A. FFATA Amend. Amend.# Amend. dateOther Fund Type Description:

Attachments

Personalize | Find | View All | Add

First1 of 1Last

Sequence	Attached File	Date Added	Add
1		01/05/2024	Add

SaveReturn to SearchNotify

Award | Review

Field Descriptions

Header Section:

**Supplier ID:** Enter the grantee’s Supplier ID. Only active suppliers may be selected. Grant data is stored at the supplier level, including grants issued to other state agencies/departments. This field is 10 characters long, and you must enter the leading 0’s.

**Federal Grantee Fiscal Year End Month:** This field is required only if a supplier receives one or more grants of federal funds. If the supplier receives only non-federal grants, the field may be left blank. Once a value has been entered in this field, it will be grayed out after saving and may only be updated by Finance & Management. If a supplier is receiving a grant of federal funds this field must be completed before the award record can be saved.

**Active/Inactive (View Selection):** Default view is “Active” awards. The user may select to view only “Inactive” awards, or “Both” to view both Active and Inactive awards. Note: If you select Inactive or Both, you will be prompted to save the page when you exit, even if no data has been changed.

## Award Information Section:

**Business Unit #: (REQUIRED)** Enter the GL Business Unit of the issuing department.

**Grant #: (REQUIRED)** Enter the unique Grant Agreement Number that will consist of the VISION Business Unit plus a minimum of one additional character (ex: 05100-1); maximum 30 alpha-numeric characters, hyphen optional. Except for the BU prefix, this number must correspond with the grant number on the grant agreement document. (Note: It is recommended that you tab out of this field so that an edit to prevent duplicate grant numbers will run properly. Failure to tab out of the field may result in an error message when saving the award.)

**Active/Inactive: (REQUIRED)** This will default to Active for all new grant awards.

**Performance Measures: (REQUIRED)** Identify whether the grant award contains performance measures. Refer to information on the [Performance Management](#) section of the Agency of Administration's website for more information.

**Start Date, End Date and Issued Date: (REQUIRED)** Enter the grant's Start and End Dates as shown on the Grant Agreement document. The Issued Date should be the date the award was signed and/or executed. The format is **MM/DD/YYYY**

**Date Entered:** This field will automatically populate on the day the grant award is originally entered in GT module and will not be overwritten if the award is later updated.

**Grant Title/Description: (REQUIRED)** Enter a title or brief description of the grant. Field length is 100 alphanumeric characters.

**Address: (REQUIRED)** The supplier's default address will populate from your supplier selection. If the address that has populated isn't the correct address for this particular grant award, select the correct supplier's address number from the drop-down list by clicking the magnifying glass to the right of the field. Only current active addresses are available for selection.

**BU Contact Name: (REQUIRED)** Enter the BU Contact Name in the PeopleSoft format: Lastname,Firstname. This is the main point of contact at the State of Vermont granting agency for this grant.

**Phone: (REQUIRED)** Enter the phone number for the BU Contact Name.

**General Comments: (OPTIONAL)** Enter comments pertaining to the grant award, if desired. This field will most often be used to document the reason for a grant amendment or other pertinent information not entered elsewhere.

## Grant Lines Section:

**Fund Type:** Enter the appropriate fund type from the drop-down menu. (F-Fund=Federal; G-Fund=General Fund; GC-Fund=Global Commitment; S-Fund=Special Fund; Other=any other type of fund. Note: If Other is selected, a description must be entered in the Other Fund Type Description field.)

**Amount: (REQUIRED)** Enter the amount granted for each fund type. Insert rows (using the + sign) for multiple funding sources. The Total Amount will automatically calculate and display based upon the information entered on the grant rows. *An unlimited combination of fund types is allowed.*

**CFDA #:** *(REQUIRED for F-Fund types, optional for GC-Fund types)* Enter the Catalog of Federal Domestic Assistance (CFDA) number under which the grant is funded. Format is **##. ###**.

**S.A. [SubAward]:** *(Replaces A-133 checkbox. It applies to F-Fund and GC-Fund types only)* When F-Fund is selected, this field automatically populates as checked. Only uncheck this field for F-Fund grants if the award is not subject to single audit reporting requirements. A *warning message* will appear if this box is unchecked. The field is also available for selection when GC-Fund is selected, but defaults as unchecked. This field is unavailable for all other fund types.

*Note: Federal grants to other state agencies/departments and those Federal grants not considered subrecipient per the Uniform Guidance **should be unchecked**.*

**FFATA:** *(Applies to F-Fund and GC-Fund types only)* If F-Fund is selected and the amount is \$25,000 or above, this field will default to checked. It may be unchecked if the grant is not subject to FFATA reporting requirements. This field is available for selection when GC-Fund is selected but does not default to checked regardless of the amount entered.

**Amend:** To enter an amendment, insert a row and check the Amend checkbox.

**Amend #:** Enter the amendment number or identification of the amendment.

**Amend Date:** Enter the date of the amendment. The default will be today's date, but this can be changed.

**Other Fund Type Description:** *(Applies to Other fund type only)* When "Other" is selected in the Fund Type field, a description must be entered of the fund type. Field length is 25 characters.

#### **Attachments Section:**

This section allows for scanned copies of Grant Agreement Part 1 to be attached. Due to its large size, Grant Agreement Part 2 should not be attached. If an amendment affects the contents of the original Grant Agreement Part 1, the revised version should also be uploaded, when applicable.

**Sequence:** A system-generated number that numbers the files in the order in which they are uploaded.

**Attached File:** Filename of the attached file.

**Date Added:** The date the file was uploaded.

Review Page

Review - Used for Federal Grants Only

Grantee Supplier ID: 0000041553

Lamoille County Clerk

Federal Grantee Fiscal Year End Month:

Audit Section

Find | View All

First 1 of 1 Last

☐ Subrecipient Annual Report Received

☐ Annual Report Extension Granted

Audit Required?

Rev.

☐

Ext. date:

Comments 2

☐ Delinquent

Fiscal Year:

Comments 1

Primary Pass-Through:

Comments on Findings

☐ Audit Received

☐ Audit Reviewed

☐ Audit Accepted

☐ Mgt. Decision Letter Issued

☐ Audit Contains Findings/Issues

☐ Corrective Action Plan Requested

☐ Corrective Action Plan Received

Dates

Total Amount

Find | View All

First 1 of 1 Last

Expenditures Section

ALN

Granting Agency

Grant Number

Expended Amount

0.00

Attachments

Sequence	Attached File	Date Added
1	1	01/05/2024

Save

Return to Search

Notify

Award

Review

Finance

Field Descriptions

Fields Completed by Finance & Management Only

(These fields are grayed out for non-Finance & management users)

**Fiscal Year:** The grantee's fiscal year period covered by the reports.

**Subrecipient Annual Report Received:** Indicates that the Subrecipient Annual Report (SAR) has been submitted by the supplier

**Rev:** Indicates that the current report is a revision of a previous submission.

**Date Received:** The date the latest report was received from the subrecipient.

**Delinquent:** Indicates that the grantee has not submitted the SAR and is in a delinquent status.

**Audit Required:** Indicates whether a single audit is required for this fiscal year period.

**Annual Report Extension Granted (Rarely Used):** Indicates that an extension was granted for the due date for the SAR.

**Ext Date (Rarely Used):** Indicates the extended due date.

**Comments1 and 2:** These comments boxes are used by Finance & Management to record comments pertaining to SAR submissions, changes in a supplier's fiscal year period, and changes in assignment of a primary pass-through entity.

### **Fields Completed by the Primary Pass-Through Entity**

The following checkboxes and date fields are completed by the primary pass-through entity regarding the review of the grantee's single audit report. All date fields default to the current date which may be manually overwritten.

**Audit Received and Date Received:** Indicates that the single audit report was received.

**Audit Reviewed and Date Reviewed:** Indicates that the audit report was reviewed and the date the review was completed.

**Audit Accepted and Date Accepted:** Indicates that the audit report contained no findings and was accepted or that the grantee's corrective action plan has been accepted. If a management decision letter was required (see Bulletin 5), it should be issued at this time.

**Mgt. Decision Letter Issued and Date:** Indicates that a management decision letter was issued by the primary pass-through entity. *(Note: Management decision letters must be issued within 6 months when the report contains findings.)*

**Audit Contains Findings/Issues:** Indicates that the audit report contained audit findings or had other issues which need resolution before the report could be accepted.

**Corrective Action Plan Requested:** Indicates that a corrective action plan was requested from the grantee.

**Corrective Action Plan Received:** Indicates that the corrective action plan was received by the primary pass-through.

### **Field Completed by Any User**

**Comments on Findings:** This comments box may be updated by any pass-through entity regarding review of their single audit report or to document any other monitoring activity conducted.

### **Expenditures Section**

These fields are completed by Finance & Management when the Subrecipient Annual Report is received. Beginning with reports for fiscal year ending 12/31/2015, only the total expenditures are entered and

the other fields are left blank. This change was made because the Attachments Section (see below) was added and a scanned copy of the report is now accessible to users.

**CFDA Nbr:** The CFDA number under which the expenditures occurred.

**Granting Agency:** The granting agency is the organization who granted the funds to the subrecipient. This is most often a State of Vermont agency, but may also be a Federal agency or other external organization.

**Grant Number:** The grant award number.

**Expended Amount:** The amount expended by the subrecipient during its fiscal year.

*The data entered in this section by Finance & Management is as reported by the subrecipient on their Subrecipient Annual Report. It is not audited, nor does the subrecipient provide backup documentation.*

## **Attachments Section**

This section allows for scanned copies of the Subrecipient Annual Report to be attached. If a report is revised, both the original report and the revision will be attached here.

**Sequence:** A system-generated number which numbers the files in the order in which they are uploaded.

**Attached File:** Filename of the attached file.

**Date Added:** The date the file was uploaded.

## Open/Start a Grantee Record

**Situation when this function is used:** Whenever information is to be accessed in the Grant Tracking module. This exercise is the first step in viewing or adding any information in this module.

**Note:** All grant recipient data is entered by supplier number and these suppliers must be set up in VISION prior to data entry. Only active suppliers are available for selection and if a supplier becomes inactive, it is no longer available for editing in this module. If an active supplier has not had a previous grant, you are brought to a blank award screen and can then enter all necessary information.

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

VT Grant

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches

Saved Searches Choose from saved searches

Search by: Supplier ID begins with 0000041553

Show more options

Search

1 Enter a 10-digit (including the leading zeros) valid supplier ID number

2 Click Search

The Award page will display. If you need to view the Review page, click the [Review](#) tab.

**Security:** Business unit level security exists on the awards in the GT module. This means that you are restricted to view and/or enter awards in the business units to which you have VISION security to access.

**Display:** The default display is for Active awards. This can be changed by modifying the Active/Inactive drop-down at the top of the page. (See [View Inactive Awards](#).)

**If Supplier Number is not known:**

Use the [Search By](#) criteria and the wildcard (% sign) to browse and select suppliers by name:

VT Grant

Find an Existing Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches

Saved Searches Choose from saved searches

Search by: Name 1 begins with Child%

Show more options

Search

1 Select Name 1 from the drop-down menu and enter your search criteria.

2 Click Search



Example: You are looking for Child Care Resource, but do not know the Supplier ID.  
You can enter “Child”, “%Child”, or “Child care%” to get a list of suppliers that contain or begin with Child Care. You then select the appropriate supplier from the list:

▼ Search Results

17 results   Name 1 "Child%"

View All

First

1-10 of 17

Last

Name 1	Supplier ID	
Child Care Center In Norwich	0000000311	>
Child Care Resource	0000006962	>
Child Care of the Berkshires, Inc.	0000328385	>
Child First Advocacy Center	0000004360	>
Child Support-Garnishments	0000047458	>
Child Support-Satellite Payments	0000044026	>
Child Welfare League of America	0000008910	>
Children Awaiting Parents Inc	0000399972	>
Children's Choice Childcare Center LLC	0000398769	>
Children's Home Society of North Carolin	0000405233	>

***Note: If your search by name produces no results, call VISION Finance Support at 828-6700, Option 2. Since only active suppliers are available for data entry, it is possible that the supplier is not currently active in VISION.***

## View the Award Page

**Situation when this function is used:** To review grant award information.

**Note:** All grant recipient data is entered by supplier number and these suppliers must be set up in *VISION* prior to data entry. Only active suppliers are available for selection and if a supplier becomes inactive, it is no longer available for editing in this module.

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See [Open a Grantee Record](#) to find a supplier.

If the supplier number is not known, click the drop-down arrow and change the **Search By field** to Name 1. Type the first few letters of the supplier name, click **Search**. You can also use the % sign as a wildcard. [See previous exercise.]

The **Award** page will display:

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active **SEARCH**

Grantee Supplier ID: 0000006962 Supplier name: Child Care Resource Federal Grantee Fiscal Year End: 6  
Month:

**Award Information** Find | View All First 1 of 17 Last

Business Unit: 03440 BU Name: Children and Family Services

Grant #: 03440-30028-12-SPTS Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 04/01/2011 End Date: 12/31/2011 Issued Date: 03/16/2011 Date entered: 07/25/2011

Grant Title/Description: Support for Starting Points - enhancing child care through networks of child care providers

\*Address: 181 Commerce St City: Williston State: VT Zip: 05495

BU Contact Name: Walker, Jan Phone: 802/241-2198

General Comments: Total Amount: 7,350.00

**Grant Lines** Find | View All First 1 of 1 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	7,350.00	93.596	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

**Attachments** Personalize | Find | View All First 1 of 1 Last

Sequence	Attached File	Date Added	Add
1		10/15/2018	Add

**Save** **Return to Search** **Notify**

**Award | Review**

## View Inactive Awards

**Situation when this function is used:** When a grant is inactivated, it no longer appears in the default view of active awards. To view inactive awards, the view must be changed.

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See [Open a Grantee Record](#) to find a supplier.

The Award page will display. The default view is that only awards with a status of “Active” are visible.

The screenshot shows the 'GRANT TRACKING MODULE' interface. At the top, there are tabs for 'Award' and 'Review'. Below the title, there's a 'Grant Awards' section. A dropdown menu labeled 'Active/Inactive' is set to 'Active'. A 'SEARCH' button is next to it. Below this, there's a section for 'Grantee Supplier ID: 0000000086' and 'Supplier name: Brattleboro Retreat'. A blue callout box points to the 'Active/Inactive' dropdown with the text 'Default view is Active awards only'. Another blue callout box points to the 'Active' status in the dropdown with the text 'Active grants are visible'. The 'Award Information' section shows 'Business Unit: 03420' and 'Grant #: 03420-5644S'. The 'Active/Inactive' dropdown is also set to 'Active'. The 'Grant contains performance measures?' section has 'Yes' and 'No' radio buttons, with 'No' selected. The 'Start date' is 07/01/2010, 'End Date' is 06/30/2011, and 'Issued Date' is 07/01/2010. The 'Date entered' is 07/01/2010. The 'Grant' field contains 'Hospital Preparedness Program'. A pagination bar at the bottom shows 'First 1 of 23 Last'.

*Note that there are **23** awards available in the current view of Active award*

To view inactive awards, the view must be changed:

The screenshot shows the 'GRANT TRACKING MODULE' interface. At the top, there are tabs for 'Award' and 'Review'. Below the title, there's a 'Grant Awards' section. A dropdown menu labeled 'Active/Inactive' is set to 'Inactive'. A 'SEARCH' button is next to it. A red callout box points to the 'Active/Inactive' dropdown with the text 'Select Inactive from the drop-down menu and click SEARCH'. Below this, there's a section for 'Grantee Supplier ID: 0000000086' and 'Supplier name: Brattleboro Retreat'. A blue callout box points to the 'Inactive' status in the dropdown with the text 'Inactive grants are visible'. The 'Award Information' section shows 'Business Unit: 02240' and 'Grant #: 02240-ASEP-REN-019'. The 'Active/Inactive' dropdown is also set to 'Inactive'. The 'Grant contains performance measures?' section has 'Yes' and 'No' radio buttons, with 'No' selected. The 'Start date' is 07/01/2010, 'End Date' is 10/01/2010, and 'Issued Date' is 07/01/2010. The 'Date entered' is 07/01/2010. The 'Grant' field contains 'ARRA Grant for new oil boiler'. A pagination bar at the bottom shows 'First 1 of 13 Last'.

*Note that the number of records to scroll through has changed from **23** to **13**.*

To view both Active and Inactive awards:

**Select Both from the drop-down menu and click SEARCH**

Grant Information: 1 of 36 records

Business Unit: 02240 BU Name: Public Service Department

Grant #: 02240-ASEP-REN-019 Active/Inactive: Inactive Grant contains performance measures? Yes No

Start date: 07/01/2010 End Date: 10/01/2010 Issued Date: 07/01/2010 Date entered: 07/01/2010

Grant: ARRA Grant for new oil boiler

*Note that there are now **36** award records available.*

To return to the default view of Active awards only, select **Active** from the drop-down list.

When you view Inactive awards, the view is changed for the current supplier and the current session only. If you close this supplier's record and select a new supplier number, the view will return to the default of Active-only.

Note: After changing the view to Inactive or Both, when you close the supplier's record, you will be prompted to Save, *even if you have not made changes*. Be sure to Save if you have made changes, but if you have not, you may disregard this message.

## Enter a New Non-Federal Grant Award

**Situation when this function is used:** To enter a new grant award for a grant recipient that is not funded with federal funds.

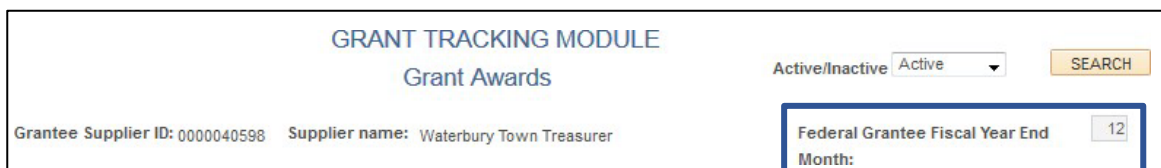
**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

**Note:** For ease of data entry, you will want to have the grant document at hand. All the information you will need to complete the steps below should be found there.

- ✓ All grant recipient data is entered by supplier and these suppliers must be set up in VISION prior to data entry. Only active suppliers are available for selection and when a supplier becomes inactive, it is no longer available for editing in this module. If the supplier number is not known, click the drop-down arrow and change the Search By field to Name 1. Type the first few letters of the supplier name and click Search. You can also use the % sign as a wildcard. (See [Open a Grantee Record](#).)

The Grant Tracking Module, Grant Awards Page will display.

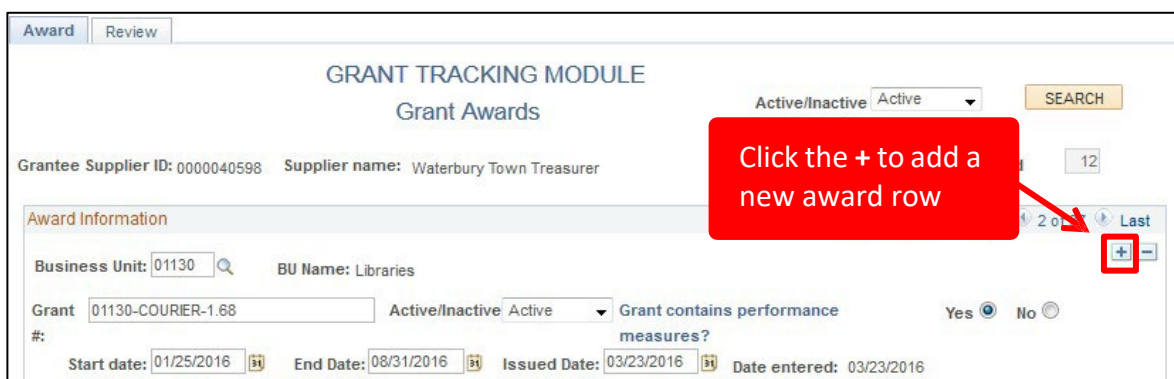
- ✓ The Federal Grantee Fiscal Year End Month field does not apply to non-federal grants, but if there are previous federal grants already entered in the module under this supplier number, you will note that this field will be filled in and grayed out.



### Award Information Section

If there are no grants previously entered for this supplier, the fields in the Award Information area will be blank and you can begin entering the grant award information.

If there are existing grants to this supplier:



After the record is saved, grants will be saved in numeric/alphabetic order by Grant Number, so it does not matter in which order the row is inserted.

A new, blank award row will appear:

Award

Review

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActive

SEARCH

Grantee Supplier ID: 0000040598Supplier name: Waterbury Town TreasurerFederal Grantee Fiscal Year End12Month:

Award Information

Find | View All

First2 of 39Last

Business Unit:

BU Name:

Grant #:

Active/InactiveActive

Grant contains performance measures?

Yes

No

Start date:

End Date:

Issued Date:

Date entered: 11/13/2018

Grant Title/Description:

\*Address:

28 North Main Street, Suite 1

City: Waterbury

State: VT

Zip: 05676

BU Contact Name:

Phone:

General Comments:

Total Amount: 0.00

Grant Lines

Find | View All

First1 of 1Last

\*Fund Type

\*Amount

CFDA #

S.A.

FFATA

Amend.

Amend.#

Amend. date

Other Fund Type Description:

Attachments

Personalize | Find | View All

First1 of 1Last

Sequence	Attached File	Date Added	Add
1		11/13/2018	Add

Save

Return to Search

Notify

Award | Review

Enter the following information on the new, blank grant award row:

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' form. Red circles with numbers 1 through 8 are placed around the form, with arrows pointing to specific fields:

- 1: Points to the 'Business Unit' field (01130).
- 2: Points to the 'Grant #' field (01130-TRAINING-02).
- 3: Points to the 'Active/Inactive' dropdown menu (Active).
- 4: Points to the 'Grant contains performance measures?' radio buttons (Yes selected).
- 5: Points to the 'Start date' field (07/01/2018).
- 6: Points to the 'End Date' field (06/30/2019).
- 7: Points to the 'Issued Date' field (11/13/2018).
- 8: Points to the 'Grant Title/Description' field (Training Test).

Other visible fields include: Gantee Supplier ID: 0000040598, Supplier name: Waterbury Town Treasurer, Federal Grantee Fiscal Year End: 12, Month: , BU Name: Libraries, Grant Title/Description: Training Test, \*Address: Waterbury Public Library, City: Waterbury, State: V, Zip: 05676, BU Contact Name: Test,Robert, Phone: 628-4047, Total Amount: 4,500.00, and a table for Attachments with one row showing a file added on 11/13/2018.

1. Enter your **Business Unit #**

2. Enter the **Grant Number**

Enter the unique Grant Number. Format = VISION Business Unit plus a minimum of one additional character (ex: 05100-1); maximum 30 alpha-numeric characters, hyphen optional. **This number must correspond with the grant number on the grant agreement document.**

3. **Active/Inactive**

Will default to Active. Accept default.

4. **Performance Measures** - Select Yes or No to indicate if the award contains performance measures.

5. Enter the **Start Date** - Enter the start date for the grant. Format = **MM/DD/YYYY**.

6. Enter the **End Date** - Enter the end date for the grant. Format = **MM/DD/YYYY**.

7. Enter the **Issued Date** - Enter the date the grant was issued or executed. Format = **MM/DD/YYYY**.

8. Enter the **Grant Title/Description** - Enter a title or brief description of the grant. Format = up to 100 alphanumeric characters.



**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000040598 Supplier name: Waterbury Town Treasurer Federal Grantee Fiscal Year End: 12  
Month:

**Award Information** Find | View All First 2 of 39 Last

Business Unit: 01130 BU Name: Libraries

Grant: 01130-TRAINING-02 Active/Inactive: Active Grant contains performance measures? Yes No

#:

Start date: 07/01/2018 End Date: 06/30/2019 Issued Date: 11/13/2018 Date entered: 11/13/2018

Grant: Training Test

Title/Description:

\*Address: 3 Waterbury Public Library

City: Waterbury State: VT Zip: 05676

BU Contact Name: Test,Robert Phone: 828-4047

General Comments:

Total Amount: 4,500.00

**Grant Lines** Find | View All First 1 of 1 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend.date	Other Fund Type Description:
F-Fund			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

**Attachments** Personalize | Find | View All | 1 of 1 Last

Sequence	Attached File	Date Added	Add
1		11/13/2018	Add

Save Return to Search Notify

Award | Review

9. **Address** will populate automatically from the default supplier address number. If this isn't the correct address for this grant award, you will need to choose the correct address number from the list.

Click the magnifying glass to bring up a list of active addresses for the grantee.

Select the correct address number for this grant.

In some cases, the same address will appear more than once on the list. You may select any one.

The City, State, Zip of the address selected will display on the page.

10. Enter the **BU Contact Name** - Enter the name of the main contact in the State of Vermont granting agency. PeopleSoft format: Lastname,Firstname
11. Enter the **Phone Number** for the contact person - Recommended format = ###-####
12. Enter **Comments**, if desired. Comments are primarily entered to provide an explanation when the award is modified due to an amendment or when being closed out. This field is typically left blank for initial award entry.



## Grant Lines Section

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' interface. The 'Award Information' section contains fields for Business Unit (01130), BU Name (Libraries), Grant # (01130-TRAINING-02), and various dates. The 'Grant Lines' section is highlighted with a red box and contains a table with columns: \*Fund Type, \*Amount, CFDA #, S.A., FFATA, Amend., Amend.#, Amend. date, and Other Fund Type Description. The first row shows 'S-Fund' with an amount of 4,500.00. Red callout boxes are numbered 13, 14, and 15. Box 13 points to the \*Fund Type dropdown menu. Box 14 points to the \*Amount input field. Box 15 points to the Other Fund Type Description input field.

13. Select the **Fund Type** from the drop-down list - **Note:** The *Other Fund Type Description* field is unavailable unless “Other” is selected from the Fund Type drop-down; this is a required field when Other is selected:

This close-up shows the 'Grant Lines' section with the \*Fund Type dropdown set to 'Other'. A red callout box with white text and arrows pointing to the 'Other Fund Type Description' field states: 'Other Fund Type Description must be completed if Other is selected as Fund Type'.

14. Enter the **Grant Amount** - Enter the amount granted for each fund type. Format = numeric with 2 decimal places. Commas will be auto-inserted where appropriate. Insert rows (using the + sign) for multiple federal funding sources. The Total Amount will automatically calculate and display based upon the information entered on the grant rows.
15. **Amend checkbox, Amend#, and Amend date** - These fields are used only when modifying an existing award. They should be left blank for initial award entry.

Attachments Section

16. Add an attachment by clicking on **Add**:

Attachments					Personalize	Find	View All			First	1 of 1	Last
	Sequence	Attached File	Date Added	Add								
1	1		10/10/2018	Add								

17. Click **Choose File** to find your attachment and click **Upload**:

File Attachment

Choose File

No file chosen

Upload

Cancel

Attachments					Personalize	Find	View All			First	1 of 1	Last
	Sequence	Attached File	Date Added	View	Delete							
1	1	Test_Grant_Doc.docx	10/10/2018	View	Delete							

18. Click **Save**:

Award

Review

GRANT TRACKING MODULE

Grant Awards

Active/Inactive

Active

SEARCH

Grantee Supplier ID: 0000040598

Supplier name: Waterbury Town Treasurer

Federal Grantee Fiscal Year End Month: 12

Award Information

Find | View All

First 2 of 39 Last

Business Unit: 01130

BU Name: Libraries

Grant #: 01130-TRAINING-02

Active/Inactive: Active

Grant contains performance measures? Yes No

Start date: 07/01/2018

End Date: 06/30/2019

Issued Date: 11/13/2018

Date entered: 11/13/2018

Grant Training Test

Title/Description:

\*Address: 3 Waterbury Public Library

City: Waterbury State: VT Zip: 05676

BU Contact Name: Test,Robert Phone: 828-4047

General Comments:

Total Amount: 4,500.00

Grant Lines

Find | View All

First 1 of 1 Last

\*Fund Type: S-Fund

\*Amount: 4,500.00

CFDA #

S.A.

FFATA Amend.

Amend.#

Amend. date

Other Fund Type Description:

Attachments

Personalize | Find | View All

First 1 of 1 Last

	Sequence	Attached File	Date Added	Add
1	1		11/13/2018	Add

Save

Return to Search

Notify

Award | Review

## Enter a New Federal Grant Award

**Situation when this function is used:** To enter a new Federal grant award for a subrecipient.

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

**Note:** *For ease of data entry, you will want to have the grant document at hand. All the information you will need to complete the steps below should be found there.*

- ✓ *All grant recipient data is entered by supplier and these suppliers must be set up in VISION prior to data entry. Only active suppliers are available for selection and when a supplier becomes inactive, it is no longer available for editing in this module. If the supplier number is not known, click the drop-down arrow and change the Search By field to Name 1. Type the first few letters of the supplier name and click Search. You can also use the % sign as a wildcard. (See [Open a Grantee Record.](#))*

The Grant Tracking Module, Grant Awards Page will display:

Enter the **Federal Grantee Fiscal Year End Month:**



GRANT TRACKING MODULE  
Grant Awards

Active/Inactive: Active

Grantee Supplier ID: 0000357413 Supplier name: Adult & Child Mental Health Center, Inc

Federal Grantee Fiscal Year End Month: 12

*This is the grantee's fiscal year end month period and it is **not necessarily the grant period**, nor is it necessarily the State's fiscal year period! This information must be obtained from the grantee and it is very important that it be correct.*

*If there are previous federal grants to the grantee already entered in the system, the fiscal year end month field will be filled in and grayed out. **If it is blank and you are entering a federal grant, you must enter the Fiscal Year Ending Month for the award to be saved.***

Format = numerals 1-12 - Example: End month = 9 for fiscal year ending on September 30.

Award Information Section

If there are no grants previously entered to this supplier, the fields in the Award Information area will be blank and you can begin entering the grant award information.

If there are existing grants to this supplier:

Click the + sign in the upper right corner of the visible grant award to insert a new blank row:

AwardReview

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActive

SEARCH

Grantee Supplier ID: 0000357413Supplier name: Adult & Child Mental Health Center, Inc

Award Information

Business Unit: 03460BU Name: Disabilities Aging Ind. Living

Grant #: 03460-TRN-06-01Active/InactiveActiveGrant contains performance measures? YesNo

Start date: 07/01/2018End Date: 06/30/2019Issued Date: 10/11/2018Date entered: 10/11/2018

Click the + to add a new award row

+ -

After the record is saved, grants will be saved in numeric/alphabetic order by Grant Number, so it does not matter where the row is inserted.

A new, blank award row will appear:

AwardReview

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActive

SEARCH

Grantee Supplier ID: 0000357413Supplier name: Adult & Child Mental Health Center, IncFederal Grantee Fiscal Year End Month: 12

Award Information

Find | View AllFirst2 of 2Last

Business Unit:BU Name:

Grant #:Active/InactiveActiveGrant contains performance measures? YesNo

Start date:End Date:Issued Date:Date entered: 11/11/2018

Grant Title/Description:

\*Address: 8320 Madison Ave

City: IndianapolisState: INZip: 46227

BU Contact Name:Phone:

General Comments:

Total Amount: 0.00

Grant Lines

Find | View AllFirst1 of 1Last

\*Fund Type

\*Amount

CFDA #

S.A.

FFATA

Amend.

Amend.#

Amend. date

Other Fund Type Description:

Attachments

Personalize | Find | View All | Add

First1 of 1Last

Sequence	Attached File	Date Added	Add
1		11/11/2018	Add

SaveReturn to SearchNotify

Award | Review

The screenshot shows the 'GRANT TRACKING MODULE' interface for 'Grant Awards'. It includes a search bar, a list of grant details, and a table for grant lines. Red circles with numbers 1 through 8 point to the following fields:

- 1: Business Unit (03460)
- 2: Grant # (03460-TRN-06-01)
- 3: Active/Inactive (Active)
- 4: Grant contains performance measures? (Yes)
- 5: Start date (07/01/2018)
- 6: End Date (06/30/2019)
- 7: Issued Date (10/11/2018)
- 8: Grant Title/Description (Training example)

1. Enter your **Business Unit #**

2. Enter the **Grant Number**

Enter the unique Grant Number. Format = VISION Business Unit plus a minimum of one additional character (ex: 05100-1); maximum 30 alpha-numeric characters, hyphen optional. **This number must correspond with the grant number on the grant agreement document.**

3. **Active/Inactive**

Will default to Active. Accept default.

4. **Performance Measures** - Select Yes or No to indicate if the award contains performance measures.

5. Enter the **Start Date** - Enter the start date for the grant. Format = **MM/DD/YYYY**.

6. Enter the **End Date** - Enter the end date for the grant. Format = **MM/DD/YYYY**.

7. Enter the **Issued Date** - Enter the date the grant was issued or executed. Format = **MM/DD/YYYY**.

8. Enter the **Grant Title/Description** - Enter a title or brief description of the grant. Format = up to 100 alphanumeric characters.

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000357413 Supplier name: Adult & Child Mental Health Center, Inc Federal Grantee Fiscal Year End: 12 Month:

**Award Information** Find | View All First 1 of 1 Last

Business Unit: 03460 BU Name: Disabilities Aging Ind. Living

Grant #: 03460-TRN-06-01 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 07/01/2018 End Date: 06/30/2019 Issued Date: 10/11/2018 Date entered: 10/11/2018

Grant: Training example

Title/Description:

\*Address: 1 8320 Madison Ave

City: Indianapolis State: IN Zip: 46227

BU Contact Name: Test,Robert Phone: 828-0407

General Comments:

Total Amount: 6,300.00

**Grant Lines** Find | View All First 1 of 1 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	6,300.00	84.026	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

**Attachments** Personalize | Find | View All | 1 of 1 | Add

Sequence	Attached File	Date Added	Add
1		10/11/2018	Add

Save Return to Search Notify

Award | Review

9. **Address** will populate automatically from the default supplier address number. If this isn't the correct address for this grant award, you will need to choose the correct address number from the list.

Click the magnifying glass to bring up a list of active addresses for the grantee.

Select the correct address number for this grant.

In some cases, the same address will appear more than once on the list. You may select any one.

The City, State, Zip of the address selected will display on the page.

10. Enter the **BU Contact Name** - Enter the name of the main contact in the State of Vermont granting agency. PeopleSoft format: Lastname,Firstname
11. Enter the **Phone Number** for the contact person - Recommended format = ###-####
12. Enter **Comments**, if desired.



## Grant Lines Section

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000357413 Supplier name: Adult & Child Mental Health Center, Inc. Federal Grantee Fiscal Year End: 12  
Month:

**Award Information** Find | View All First 1 of 1 Last

Business Unit: 03460 BU Name: Disabilities Aging Ind. Living

Grant #: 03460-TRN-06-01 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 07/01/2018 End Date: 06/30/2019 Issued Date: 10/11/2018 Date entered: 10/11/2018

Grant Title/Description: Training example

\*Address: 1 8320 Madison Ave

City: Indianapolis State: IN Zip: 46227

BU Contact Name: Test,Robert Phone: 828-0407

General Comments:

Total Amount: 6,300.00

**Grant Lines** Find | View All First 1 of 1 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	6,300.00	84.026	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

**Attachments** View All First 1 of 1 Last

Sequence	Added	Person
1	10/11/2018	

Save Return to Search Notify

Award | Review

13. Enter the **Fund Type** - Select **F-Fund** from the drop-down list.
14. Enter the **Grant Amount** - Enter the amount granted for each row. Format = numeric with 2 decimal places. Commas will be auto-inserted where appropriate. Insert rows (using the + sign) for multiple federal funding sources/CFDA#'s. The Total Amount will automatically calculate and display based upon the information entered on the grant rows.
15. **Enter the CFDA #** - Enter the Catalog of Federal Domestic Assistance (CFDA) number under which the grant is funded. Format = ##.###. **This is a required field when the grant is federal.**
16. **S.A.** – The Subrecipient Award box will default to checked when F-Fund is selected. **Uncheck** this box **only** for a non-Subrecipient Grant or a grant to another State of Vermont agency/department. A warning message will display if you uncheck this box.
17. **FFATA** – Defaults to checked if F-Fund is selected and the award amount is \$25,000 or greater - **Uncheck** this box only if the federal award is NOT subject to FFATA reporting requirements.
18. **Amend checkbox, Amend# and Amend date** - These fields are used only when modifying an existing award. They should be left blank for the initial award entry.

Attachments Section

19. Add an attachment by clicking on **Add**:

Attachments					Personalize	Find	View All	First	1 of 1	Last
Sequence	Attached File		Date Added		Add					
1			10/10/2018		Add					

20. Click **Choose File** to find your attachment and click **Upload**:

File Attachment

Choose File

No file chosen

Upload

Cancel

Attachments					Personalize	Find	View All	First	1 of 1	Last
Sequence	Attached File		Date Added		View	Delete				
1	1 Test_Grant_Doc.docx		10/10/2018		View	Delete				

Click **Save**:

Award | Review

GRANT TRACKING MODULE

Grant Awards

Active/Inactive: Active | SEARCH

Grantee Supplier ID: 0000357413 | Supplier name: Adult & Child Mental Health Center, Inc | Federal Grantee Fiscal Year End Month: 12

Award Information

Find | View All | First | 1 of 1 | Last

Business Unit: 03460 | BU Name: Disabilities Aging Ind. Living

Grant #: 03460-TRN-06-01 | Active/Inactive: Active | Grant contains performance measures? Yes No

Start date: 07/01/2018 | End Date: 06/30/2019 | Issued Date: 10/11/2018 | Date entered: 10/11/2018

Grant Title/Description: Training example

\*Address: 1 | 8320 Madison Ave

City: Indianapolis | State: IN | Zip: 46227

BU Contact Name: Test,Robert | Phone: 828-0407

General Comments: | Total Amount: 6,300.00

Grant Lines

Find | View All | First | 1 of 1 | Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	6,300.00	84.026	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Attachments

Personalize | Find | View All | First | 1 of 1 | Last

Sequence	Attached File	Date Added	View	Delete
1	1 Test_Grant_Doc.docx	10/11/2018	View	Delete

Save

Return to Search | Notify

Award | Review



## Enter a New Multi-Fund Grant Award

**Situation when this function is used:** To enter a new grant award that is funded with multiple fund types.

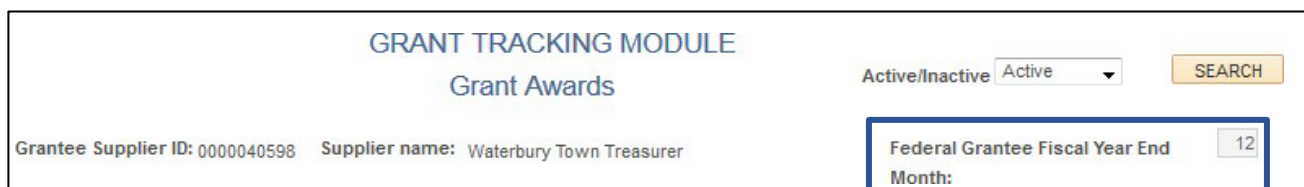
**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

**Note:** For ease of data entry, you will want to have the grant document at hand. All the information you will need to complete the steps below should be found there.

- ✓ All grant recipient data is entered by supplier and these suppliers must be set up in VISION prior to data entry. Only active suppliers are available for selection and when a supplier becomes inactive, it is no longer available for editing in this module. If the supplier number is not known, click the drop-down arrow and change the Search By field to Name 1. Type the first few letters of the supplier name and click Search. You can also use the % sign as a wildcard. (See [Open a Grantee Record.](#))

The Grant Tracking Module, Grant Awards Page will display.

If the grant award is funded with Federal funds, check to see if the **Federal Grantee Fiscal Year End Month** field has a value in it. If it is blank, **you must enter the Fiscal Year Ending Month before saving the award.**



GRANT TRACKING MODULE  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000040598 Supplier name: Waterbury Town Treasurer

Federal Grantee Fiscal Year End Month: 12

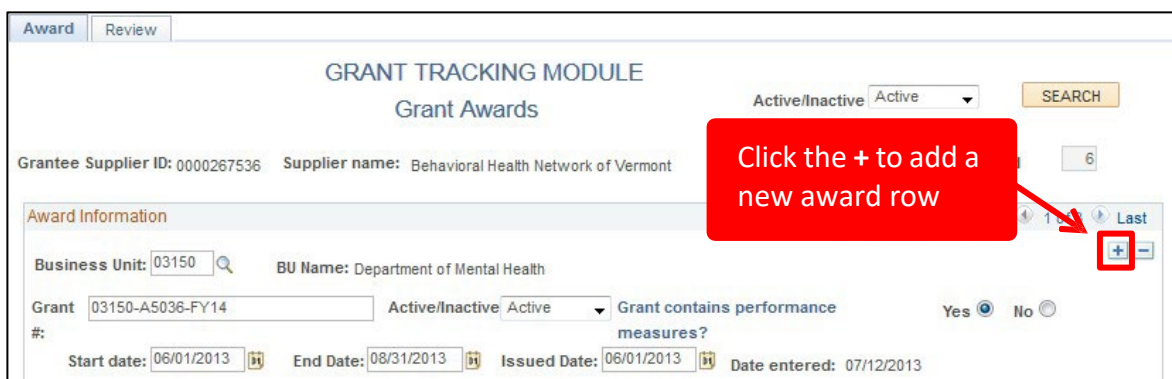
**Note:** This is the grantee's fiscal year period and it is **not necessarily the grant period**, nor is it necessarily the State's fiscal year period! This information must be obtained from the grantee and it is very **important that it be correct.**

Format = numerals 1-12 - Example: End month = 12 for fiscal year ending on December 31.

### Award Information Section

If there are no grants previously entered for this supplier, the fields in the Award Information area will be blank and you can begin entering the grant award information.

**If there are existing grants to this supplier:**



Award Review

GRANT TRACKING MODULE  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000267536 Supplier name: Behavioral Health Network of Vermont

Award Information

Business Unit: 03150 BU Name: Department of Mental Health

Grant #: 03150-A5036-FY14 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 06/01/2013 End Date: 08/31/2013 Issued Date: 06/01/2013 Date entered: 07/12/2013

Click the + to add a new award row

After the record is saved, grants will be saved in numeric/alphabetic order by Grant Number, so it does not matter where the row is inserted.

A new, blank grant award row will appear:

Award

Review

GRANT TRACKING MODULE

Grant Awards

Active/inactiveActive

SEARCH

Grantee Supplier ID: 0000267536Supplier name: Behavioral Health Network of VermontFederal Grantee Fiscal Year End6Month:

Award Information

Find | View AllFirst2 of 4Last

Business Unit:BU Name:

GrantActive/inactiveActiveGrant contains performance measures?YesNo

#:Start date:End Date:Issued Date:Date entered: 10/11/2018

GrantTitle/Description:

\*Address:137 Elm Street

City: MontpelierState: VTZip: 05602

BU Contact Name:Phone:

General Comments:Total Amount:0.00

Grant Lines

Find | View AllFirst1 of 1Last

\*Fund Type\*AmountCFDA #S.A.FFATA Amend.Amend.#Amend.dateOther Fund Type Description:

Attachments

Personalize | Find | View All620First1 of 1Last

Sequence

Attached File

Date Added

Add

1

1

10/11/2018

Add

Save

Return to Search

Notify

Award | Review

1

2

5

8

9

3

6

7

10

12

4

11

Award

Review

GRANT TRACKING MODULE

Grant Awards

Active/inactiveActive

SEARCH

Grantee Supplier ID: 0000267536Supplier name: Behavioral Health Network of VermontFederal Grantee Fiscal Year End6Month:

Award Information

Find | View AllFirst2 of 4Last

Business Unit:03410BU Name: Vermont Health Access

Grant03410-TRN-07-01Active/inactiveActiveGrant contains performance measures?YesNo

#:Start date:01/01/2018End Date:12/31/2018Issued Date:10/11/2018Date entered: 10/11/2018

GrantTrainingTitle/Description:

\*Address:137 Elm Street

City: MontpelierState: VTZip: 05602

BU Contact Name:Test,RobertPhone:828-0407

General Comments:Total Amount:

Grant Lines

Find | View AllFirst1 of 1Last

\*Fund Type\*AmountCFDA #S.A.FFATA Amend.Amend.#Amend.dateOther Fund Type Description:

Attachments

Personalize | Find | View All620First1 of 1Last

Sequence

Attached File

Date Added

Add

1

1

10/11/2018

Add

Save

Return to Search

Notify

Award | Review

1. Enter your **Business Unit #**
2. Enter the **Grant Number** - Enter the unique Grant Number. Format = VISION Business Unit plus a minimum of one additional character (ex: 05100-1); maximum 30 alpha-numeric characters, hyphen optional. **This number must correspond with the grant number on the grant agreement document.**
3. **Active/Inactive** - Will default to Active. Accept default.
4. **Performance Measures** - Select Yes or No to indicate if the award contains performance measures.
5. Enter the **Start Date** - Enter the start date for the grant. Format = **MM/DD/YYYY**
6. Enter the **End Date** - Enter the end date for the grant. Format = **MM/DD/YYYY**
7. Enter the **Issued Date** - Enter the date the grant was issued or executed. Format = **MM/DD/YYYY**
8. Enter the **Grant Title/Description:** Enter a title or brief description of the grant. Format = 100 alphanumeric characters
9. **Address** will populate automatically from the default supplier address number. If this isn't correct you will need to choose the correct address number from the list. Click the magnifying glass to bring up a list of active addresses for the grantee. Select the correct address for this grant. In some cases, the same address will appear more than once on the list. You may select either one, the City, State, Zip of the address selected will display on the page.
10. Enter the **BU Contact Name** - Enter the name of the main contact in the State of Vermont granting agency. PeopleSoft format: Lastname,Firstname
11. Enter the **Phone Number** for the contact person - Recommended format = ###-####
12. Enter **Comments**, if desired.

## Grant Lines Section

The screenshot shows the 'Grant Lines' form with the following fields and callouts:

- 13** points to the **\*Fund Type** dropdown menu, which currently shows 'F-Fund'.
- 14** points to the **\*Amount** text box, which contains '25,500.00'.
- 15** points to the **CFDA #** text box, which contains '97.007'.
- 16** points to the **S.A.** checkbox, which is checked.
- 17** points to the **FFATA Amend.** checkbox, which is checked.
- 18** points to the **Amend.#** text box, which is empty.

Other visible fields include **Amend.date** (empty), **Other Fund Type Description:** (empty), and navigation buttons (Find, View All, First, 1 of 1, Last).

13. Enter the **Fund Type** - Select F-Fund from the drop-down list
14. Enter the **Grant Amount** - Enter the amount granted for each row. Format = numeric with 2 decimal places. Commas will be auto-inserted where appropriate.
15. **Enter the CFDA #** - Enter the Catalog of Federal Domestic Assistance (CFDA) number under which the grant is funded. Format = **##.###**. **This is a required field when the grant is federal.**

16. **S.A.** - The Subrecipient Award box will default to checked when F-Fund is selected. **Uncheck** this box **only** for a non-Subrecipient Grant or a grant to another State of Vermont agency/department. A warning message will appear if this box is unchecked.
17. **FFATA** – Defaults to checked if F-Fund is selected and the award amount is \$25,000 or greater. **Uncheck** this box only if the federal award is NOT subject to FFATA reporting requirements.
18. **Amend checkbox, Amend# and Amend date** - These fields are used only when modifying an existing award. They should be left blank for the initial award entry.

Click the + sign on the far right of the grant lines section:

The top screenshot shows the 'Grant Lines' form with a single line for 'F-Fund'. The fields are: \*Fund Type (F-Fund), \*Amount (25,500.00), CFDA # (97.007), S.A. (checked), FFATA (checked), Amend. (unchecked), Amend.# (blank), Amend. date (blank), and Other Fund Type Description (blank). A red box highlights the '+' button on the far right.

The bottom screenshot shows the 'Grant Lines' form with a table of four rows. The table is highlighted with a red border. A red circle with the number '19' and an arrow points to the '+' button on the right side of the table.

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	25,500.00	97.007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Test Fund

19. Enter additional grant information adding an additional line for each grant. Note that boxes will be greyed out and/or appear depending upon the **Fund Type** selected.

Note: For the GC-Fund type (Global Commitment), the CFDA#, S.A. & FFATA fields are available for entry, but are not required fields. Complete these fields if the grant line contains federal GC funds that are subject to subrecipient reporting and leave them blank if the GC funds are state funds only.

The **Total Amount** updates automatically as each grant row is added:

AwardReview

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActiveSEARCH

Grantee Supplier ID: 0000267536Supplier name: Behavioral Health Network of VermontFederal Grantee Fiscal Year End Month: 6

Award Information

Find | View AllFirst2 of 4Last

Business Unit: 03410BU Name: Vermont Health Access

Grant #: 03410-TRN-07-01Active/Inactive: ActiveGrant contains performance measures? YesNo

Start date: 01/01/2018End Date: 12/31/2018Issued Date: 10/11/2018Date entered: 10/11/2018

Grant: Training

Title/Description:

\*Address: 137 Elm Street

City: MontpelierState: VTZip: 05602

BU Contact Name: Test,RobertPhone: 828-0407

General

Comments:

Total Amount: 25,775.00

Grant Lines

Find | View AllFirst1-4 of 4Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	25,500.00	97.007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Test Fund

Attachments

Personalize | Find | View All | AddFirst1 of 1Last

Sequence	Attached File	Date Added	Add
1		10/11/2018	Add

SaveReturn to SearchNotify

AwardReview

Attachments Section

20. Add an attachment by clicking on **Add**:

Attachments					Personalize   Find   View All   Add			First	1 of 1	Last
	Sequence	Attached File	Date Added	Add						
	1		10/11/2018	Add						

21. Click **Choose File** to find your attachment and click **Upload**:

File Attachment

Choose FileNo file chosen

UploadCancel

22. Click the **+** sign to upload additional attachments:

Attachments					Personalize   Find   View All   Add			First	1-2 of 2	Last
	Sequence	Attached File	Date Added	Add	View	Delete				
	1	Test_Grant_Doc.docx	10/11/2018		View	Delete				
	2		10/11/2018	Add						

23. Click **Save**

Award

Review

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActive

SEARCH

Grantee Supplier ID: 0000267536

Supplier name: Behavioral Health Network of Vermont

Federal Grantee Fiscal Year End6

Month:

Award Information

Find | View All

First2 of 4Last

Business Unit: 03410

BU Name: Vermont Health Access

Grant 03410-TRN-07-01

Active/InactiveActive

Grant contains performance measures?YesNo

#:

Start date: 01/01/2018

End Date: 12/31/2018

Issued Date: 10/11/2018

Date entered: 10/11/2018

Grant Training

Title/Description:

\*Address: 3137 Elm Street

City: Montpelier

State: VT

Zip: 05602

BU Contact Name: Test,Robert

Phone: 828-0407

General Comments:

Total Amount: 25,775.00

Grant Lines

Find | View All

First1-4 of 4Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	25,500.00	97.007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Test Fund

Attachments

Personalize | Find | View All

First1-3 of 3Last

Sequence	Attached File	Date Added	View	Delete
1	1 Test_Grant_Doc.docx	10/11/2018	View	Delete
2	2 Test_Grant_Doc.docx	10/11/2018	View	Delete
3	3 Test_Grant_Doc.docx	10/11/2018	View	Delete

Save

Return to Search

Notify

Award | Review



## Revise a Grant Award

**Situation when this function is used:** To revise/amend an existing grant award for a grantee. A revision is entered when an amendment is processed, or to correct a previously incorrectly entered grant award. *When a grant is being closed or canceled, follow the [Inactivate a Grant Award](#) exercise.*

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See Open a Grantee Record to find a supplier.

### Important Points:

- ✓ **Do not** change the Grant Lines section by overwriting existing data unless the revision is due to a previous data entry error. All other corrections to the Grant Lines section should be made by inserting a new row. There is no limit to the number of rows that can exist in the Grant Lines section.
- ✓ The Amendment number must match the amendment number on the grant award.
- ✓ No-cost time extensions are modified by amending the end-date but should be noted in the General Comments box and the amendment number should be entered as part of the comment.
- ✓ If reducing a federal fund row by entering a new negative row, be sure that the CFDA#, S.A. (Subrecipient Award) checkbox and FFATA checkbox matches the original row.

If the supplier has more than one award, you will need to scroll to the award to be modified. Use the **Arrows** to scroll one-by-one or choose **View All** to more quickly scroll through a long list of awards:

The screenshot displays the 'Grant Tracking Module' interface. At the top, there are tabs for 'Award' and 'Review'. Below the tabs, the title 'GRANT TRACKING MODULE' is centered, followed by 'Grant Awards'. On the right, there are filters for 'Active/Inactive' (set to 'Active') and a 'SEARCH' button. Below this, the 'Grantee Supplier ID' is 0000267536, the 'Supplier name' is 'Behavioral Health Network of Vermont', and the 'Federal Grantee Fiscal Year End' is 6. A red box highlights the navigation controls: 'Find | View All | First | 3 of 4 | Last'. Below this, the 'Award Information' section includes fields for 'Business Unit' (03410), 'BU Name' (Vermont Health Access), 'Grant #' (03410-TRN-07-01), 'Active/Inactive' (Active), 'Grant contains performance measures?' (Yes), 'Start date' (01/01/2018), 'End Date' (03/31/2019), 'Issued Date' (10/11/2018), and 'Date entered' (10/11/2018). The 'Title/Description' is 'Grant Training'. The 'Address' is '137 Elm Street', 'City' is 'Montpelier', 'State' is 'VT', and 'Zip' is '05602'. The 'BU Contact Name' is 'Test, Robert' and 'Phone' is '828-0407'. The 'General Comments' field is empty, and the 'Total Amount' is 25,775.00. Below this is the 'Grant Lines' section with a table of fund types and amounts. The 'Attachments' section at the bottom shows a list of three documents, each with a 'View' and 'Delete' button.

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	25,500.00	97.007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Test Fund

Sequence	Attached File	Date Added	View	Delete
1	1 Test_Grant_Doc.docx	10/11/2018	<a href="#">View</a>	<a href="#">Delete</a>
2	2 Test_Grant_Doc.docx	10/11/2018	<a href="#">View</a>	<a href="#">Delete</a>
3	3 Test_Grant_Doc.docx	10/11/2018	<a href="#">View</a>	<a href="#">Delete</a>

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000267536 Supplier name: Behavioral Health Network of Vermont Federal Grantee Fiscal Year End Month: 6

**Award Information** Find | View All First 3 of 4 Last

Business Unit: 03410 BU Name: Vermont Health Access

Grant #: 03410-TRN-07-01 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 01/01/2018 End Date: 03/31/2019 Issued Date: 10/11/2018 Date entered: 10/11/2018

Grant Title/Description: Training

\*Address: 137 Elm Street City: Montpelier State: VT Zip: 05602

BU Contact Name: Test,Robert Phone: 828-0407

General Comments: Amendment #1: Extend grant period to 3/31/2019 and add Fed funds of \$40,000 Total Amount: 65,775.00

**Grant Lines** Find | View 4 First 1-5 of 5 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	25,500.00	97.007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
F-Fund	40,000.00	94.001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	10/13/2018	Test Fund

**Attachments** Personalize | Find | View All First 1-3 of 3 Last

Sequence	Attached File	Date Added	View	Delete
1	1 Test_Grant_Doc.docx	10/11/2018	View	Delete
2	2 Test_Grant_Doc.docx	10/11/2018	View	Delete
3	3 Test_Grant_Doc.docx	10/11/2018	View	Delete

Save Return to Search Notify

Award | Review

Once the proper award is displaying, **modify** the needed grant award information:

1. If modifying a date or other non-amount field, simply click in the field to modify the existing data.
2. Enter a brief comment about the amendment in the **General Comments** box. Include the amendment number for easy reference.
3. To change an award amount: **Insert a row** in the Grant Lines section by clicking the **+** sign in the Grants Line section. - (**Do not** type over a previously entered amount to change the total.)
4. Select the **Fund Type** and enter the **Amount** (also enter the **CFDA#**, **S.A.** and/or **FFATA** if applicable for F-Fund amendments)
5. Click the **Amend** checkbox, fill in the **Amend.#** and modify the **Amend Date**, if necessary.



6. Click the + sign to add an additional attachment and click the Add button to upload the document:

Attachments							
Personalize   Find   View 3     First 1-4 of 4 Last							
Sequence	Attached File	Date Added	Add	View	Delete		
1	1 Test_Grant_Doc.docx	10/11/2018		<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>
2	2 Test_Grant_Doc.docx	10/11/2018		<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>
3	3 Test_Grant_Doc.docx	10/11/2018		<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>
4	4	10/13/2018	<a href="#">Add</a>			<a href="#">+</a>	<a href="#">-</a>

7. Click **Choose File** to find your attachment and click **Upload**:

File Attachment

Choose File

No file chosen

Upload

Cancel

8. Click **Save**:

Award | Review

GRANT TRACKING MODULE

Grant Awards

Active/Inactive Active 

SEARCH

Grantee Supplier ID: 0000267536 Supplier name: Behavioral Health Network of Vermont Federal Grantee Fiscal Year End Month: 6

Award Information

Find | View All First 3 of 4 Last

Business Unit: 03410 BU Name: Vermont Health Access

Grant #: 03410-TRN-07-01 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 01/01/2018 End Date: 03/31/2019 Issued Date: 10/11/2018 Date entered: 10/11/2018

Grant Training

Title/Description:

\*Address: 137 Elm Street

City: Montpelier State: VT Zip: 05602

BU Contact Name: Test,Robert Phone: 828-0407

General Comments: AMENDMENT #1: EXTEND GRANT PERIOD TO 3/31/2019 AND ADD FED FUNDS OF \$40,000

Total Amount: 65,775.00

Grant Lines

Find | View 4 First 1-5 of 5 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend. date	Other Fund Type Description:
F-Fund	25,500.00	97.007	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			Test Fund
F-Fund	40,000.00	94.001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	10/13/2018	

Attachments

Personalize | Find | View 3 | First 1-4 of 4 Last

Sequence	Attached File	Date Added	View	Delete		
1	1 Test_Grant_Doc.docx	10/11/2018	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>
2	2 Test_Grant_Doc.docx	10/11/2018	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>
3	3 Test_Grant_Doc.docx	10/11/2018	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>
4	4 Amended_Test_Grant_Doc.docx	10/13/2018	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">+</a>	<a href="#">-</a>

Save

Return to Search

Notify

Award | Review

## Inactivate a Grant Award

**Situation when this function is used:** When a grant expires or is closed, it should be inactivated. Awards are also inactivated when canceled prior to the original end date.

Important note about inactivation:

- ✓ If an award is canceled prior to the initial end date, you should edit the End Date and it **must equal the date of the cancellation**. Failure to do this will result in the award being picked up in queries and in the annual subrecipient letters sent by Finance & Management.

**General rule:** If an award is inactivated, it is closed, and the **end date cannot be in the future**.

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See [Open/Start a Grantee Record](#) to find a supplier.

Scroll to the award which needs to be inactivated or choose **View All** to find the award:

The screenshot shows the 'Grant Tracking Module' interface. At the top, there's a 'Grant Awards' section with a search bar and a dropdown menu for 'Active/Inactive' set to 'Active'. Below this, there's a list of awards. One award is selected, showing details for '08100-GR1198'. The 'Active/Inactive' dropdown is highlighted with a red circle and arrow labeled '1'. The 'End Date' is '11/09/2018', and the 'Start Date' is '10/01/2017'. The 'Grant Title/Description' is '2018 DRUG RECOGNITION EXPERT'. The 'General Comments' section contains the text 'Grant inactivated 11/9/2018 - project cancelled'. The 'Attachments' section shows one attachment. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. The 'Save' button is highlighted with a red circle and arrow labeled '4'. The 'Return to Search' button is highlighted with a red circle and arrow labeled '3'. The 'Notify' button is highlighted with a red circle and arrow labeled '2'.

1. Select **Inactive** from the **Active/Inactive** drop-down menu.
2. Verify that the End Date is not in the future. If an award is closed prior to its original end date (or is canceled after issuance), modify the end date so it matches the date the award is officially canceled/closed.

3. If desired, you may enter a comment in the **General Comments** section. This is especially helpful when an award is closed prior to the original end date or canceled and the end date may no longer match the end date on the official award document.
4. Click **Save**. Once inactivated, this award will no longer appear when you search for Active awards.

## Delete a Grant Award

**Situation when this function is used:** When a grant award was entered in error or was canceled prior to issuance. **Do not delete a grant award for any other reason.** An award should not be deleted if it was issued but later canceled or closed, even if the grantee did not incur expenses or receive payment against it. In this case, the award should be **inactivated**. (See previous exercise and notes about inactivation.)

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See [Open a Grantee Record](#) to find a supplier.

Scroll the correct Click the - icon in the upper right corner:



GRANT TRACKING MODULE  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000004360 Supplier name: Child First Advocacy Center Federal Grantee Fiscal Year End: 6 Month:

Award Information

Find | View All First 21 of 35 Last

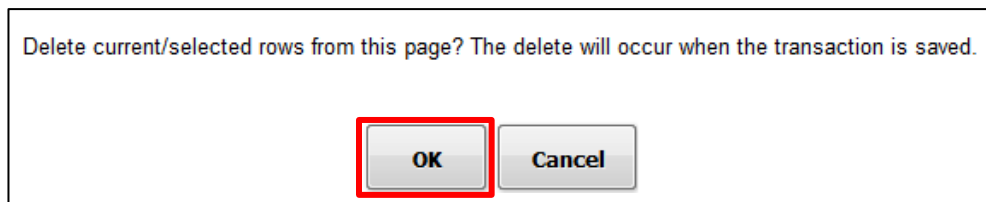
Business Unit: 02130 BU Name: State's Attorneys and Sheriffs

Grant #: 02130-2018-VTSIU-LE-02 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 07/01/2017 End Date: 06/30/2018 Issued Date: 12/06/2017 Date entered: 12/06/2017

Grant: 2018-VTSIU-LE-02 2ND INSTALLMENT

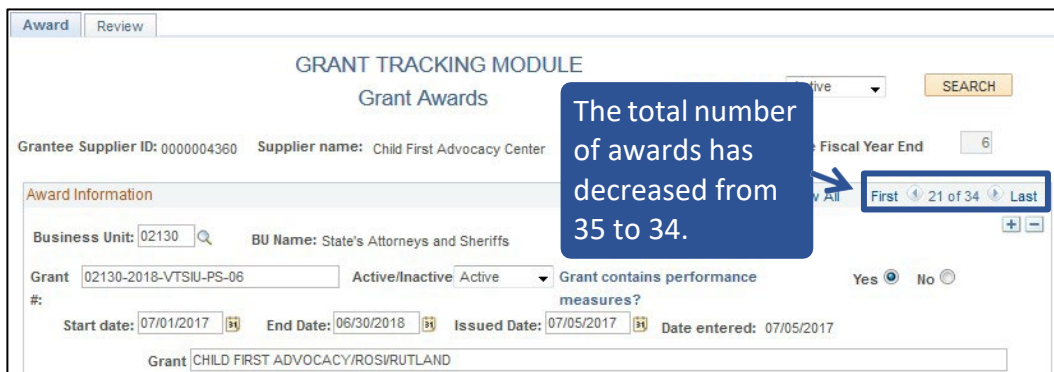
You will receive the following message, click **OK**:



Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK Cancel

Award will disappear from page:



GRANT TRACKING MODULE  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000004360 Supplier name: Child First Advocacy Center Federal Grantee Fiscal Year End: 6 Month:

Award Information

The total number of awards has decreased from 35 to 34.

First 21 of 34 Last

Business Unit: 02130 BU Name: State's Attorneys and Sheriffs

Grant #: 02130-2018-VTSIU-PS-06 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 07/01/2017 End Date: 06/30/2018 Issued Date: 07/05/2017 Date entered: 07/05/2017

Grant: CHILD FIRST ADVOCACY/ROS/RUTLAND

Click **Save**. (Although the award has disappeared from the page, it will not truly be deleted unless the page is saved.)

AwardReview

GRANT TRACKING MODULE

Grant Awards

Active/InactiveActiveSEARCH

Grantee Supplier ID: 0000004360Supplier name: Child First Advocacy CenterFederal Grantee Fiscal Year End6Month:

Award Information

Find | View AllFirst21 of 34Last

Business Unit: 02130BU Name: State's Attorneys and Sheriffs

Grant 02130-2018-VTSIU-PS-06Active/InactiveActiveGrant contains performance measures?YesNo

#:

Start date: 07/01/2017End Date: 06/30/2018Issued Date: 07/05/2017Date entered: 07/05/2017

Grant CHILD FIRST ADVOCACY/ROS/RUTLAND

Title/Description:

\*Address: 2 PO Box 6822

City: RutlandState: VTZip: 05702-6822

BU Contact Name: BERNARDINI, BARBARAPhone: 802/828-2892

General FY18 1ST INSTALLMENT

Comments:

Total Amount: 62,315.00

Grant Lines

Find | View AllFirst1 of 1Last

\*Fund Type\*AmountCFDA #S.A.FFATA Amend.Amend.# Amend. dateOther Fund Type Description:

G-Fund62,315.00

Attachments

Personalize | Find | View All1 of 1Last

SequenceAttached FileDate AddedAdd

1110/13/2018

Add

SaveReturn to SearchNotify

Award | Review

**⊗ Do not attempt to delete an award by blanking out the data in each field and saving. This will result in error messages and possibly cause erroneous data in the module. Follow the procedure above to delete an award by using the minus sign only.**

## Move a Grant Award from One Supplier to Another

**Situation when this function is used:** When a grant award was entered in error under the incorrect supplier number. There are also instances when two suppliers merge and all open grants under the old supplier number must be moved to the new supplier, or when Supplier Maintenance issues a new supplier number due to some other organizational change.

Grant awards cannot literally be “moved” from one supplier number to another. They must be deleted/inactivated under the incorrect supplier number and re-entered under the correct supplier number.

**Example:** A grant to the Town of St. Albans was incorrectly entered under the City of St. Albans’s supplier number.

**Navigation:** VT Grant Tracking > Enter Grant Data

See [Open/Start a Grantee Record](#) to find a supplier. Enter the **Supplier ID** where the original award was entered (St. Albans City Treasurer – Supplier ID 0000040245)

Deleting the Original Grant Award:

If the supplier has more than one award, you will need to scroll to the award to be deleted. Use the **Arrows** to scroll one-by-one or choose **View All** to more quickly scroll through a long list of awards and click the - icon in the upper right corner to delete the grant:

GRANT TRACKING MODULE  
Grant Awards

Active/Inactive: Active SEARCH

Gantee Supplier ID: 0000040245 Supplier name: ST Albans City Treasurer Federal Grantee Fiscal Year End: 6 Month:

Award Information Find | View All First 45 of 45 Last

Business Unit: 08100 BU Name: Transportation Agency

Grant #: 08126-CA0469 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 04/28/2016 End Date: 06/30/2020 Issued Date: 04/28/2016 Date entered: 05/02/2016

Grant ST Albans TAP TA16(3)

You will receive the following message, click **OK**:

Delete current/selected rows from this page? The delete will occur when the transaction is saved.

OK Cancel

The award will no longer appear under the St. Albans City Treasurer supplier number.



Click **Save**. (Do not close out without clicking Save to save the delete.)

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000040245 Supplier name: ST Albans City Treasurer Federal Grantee Fiscal Year End: 6  
Month:

**Award Information** Find | View All First 44 of 44 Last

Business Unit: 08126 BU Name: AOT Project Development

Grant #: 08126-CA0194 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 03/21/2007 End Date: 03/21/2028 Issued Date: 03/21/2007 Date entered: 03/21/2007

Grant: Design & construct of a new section of roadway

Title/Description:

\*Address: 1 PO Box 867

City: ST Albans State: VT Zip: 05478

BU Contact Name: Gosselin, Gnette Phone: 802/828-5696

General Comments: AMENDMENT 2 INCREASE COST Total Amount: 2,213,904.00

**Grant Lines** Find | View All First 1-2 of 2 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend.date	Other Fund Type Description:
F-Fund	560,000.00	20.205	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
F-Fund	1,653,904.00	20.205	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

**Attachments** Personalize | Find | View All | 1 of 1 Last

Sequence	Attached File	Date Added	Add
1		10/15/2018	Add

**Save** Return to Search Notify

Award | Review

Re-entering the award under the correct supplier number:

See [Open/Start a Grantee Record](#) to find a supplier. Enter the **Supplier ID** where the award should have been entered (Town of St. Albans)

Click the + icon to open a blank grant award row:

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000040253 Supplier name: ST Albans Town Treasurer Federal Grantee Fiscal Year End: 6  
Month:

**Award Information** Find | View All First 1 of 20 Last

Business Unit: 01140 BU Name: Tax

Grant #: 01140-99STALBANSTOWN Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 07/01/2013 End Date: 06/30/2014 Issued Date: 01/06/2014 Date entered: 12/18/2014

Grant: Lister Education Grants to Towns

Title/Description:

\*Address: 1 PO Box 37

City: ST Albans Bay State: VT Zip: 05481

BU Contact Name: Lewis, Alexa Phone: 828 0587

General Comments: Total Amount: 413.69

**+**

Enter the grant information as previously entered under the City of St. Albans's supplier, enter a comment in the **General Comments** box about the re-entered award and click **Save**:

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active SEARCH

Grantee Supplier ID: 0000040253 Supplier name: ST Albans Town Treasurer Federal Grantee Fiscal Year End Month: 6

**Award Information** Find | View All First 2 of 21 Last

Business Unit: 08100 BU Name: Transportation Agency

Grant #: 08126-CA0469 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 07/28/2016 End Date: 06/30/2020 Issued Date: 04/28/2016 Date entered: 10/15/2018

Grant: ST Albans TAP TA16(3)

Title/Description:

\*Address: 1 PO Box 37

City: ST Albans Bay State: VT Zip: 05481

BU Contact Name: Lessard,Rose Phone: 828-2988

**General Comments:** GRANT ORIGINALLY ENTERED UNDER VENDOR #40245 IN ERROR ON 5/2/2016. Total Amount: 300,000.00

**Grant Lines** Find | View All First 1 of 1 Last

*Fund Type	*Amount	CFDA #	S.A.	FFATA	Amend.	Amend.#	Amend.date	Other Fund Type Description:
F-Fund	300,000.00	20.205	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

**Attachments** Personalize | Find | View All | 1 of 1 | Last

Sequence	Attached File	Date Added	Add
1		10/15/2018	<span>Add</span>

Save Return to Search Notify

Award | Review

The award should look identical to the original award, except that the entered date will be the current date and there will be a comment in the General Comments box.

**Mergers/Organizational Changes:** When “moving” an award from one supplier to another due to a merger or organizational change:

1. Modify the End Date in the original supplier's award to the day prior to the effective date of the merger
2. Inactivate the award and enter a comment in the General Comments box
3. Enter the award under the new supplier as it was originally entered but make the Start Date the effective date of the merger
4. Enter a comment in the General Comments box



## Viewing the Review Page

**Situation when this function is used:** To view data entered regarding the Subrecipient Annual Report and other monitoring activities, including documentation of review of a grantee's single audit report.

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See Open a Grantee Record to find a supplier, if the Award page displays, click the **Review** Tab:

The screenshot shows the 'Grant Tracking Module' interface. At the top, there are two tabs: 'Award' and 'Review', with 'Review' highlighted by a red box. Below the tabs, the page title is 'GRANT TRACKING MODULE Grant Awards'. To the right of the title, there is a dropdown menu for 'Active/Inactive' set to 'Active' and a 'SEARCH' button. Below this, the 'Grantee Supplier ID' is 0000018323, the 'Supplier name' is 'Child & Family Services of New Hampshire', and the 'Federal Grantee Fiscal Year End Month' is 12. The 'Award Information' section includes a 'Find | View All' link and pagination '1 of 11'. The 'Business Unit' is 02160, and the 'BU Name' is 'Crime Victims' Services Center'. The 'Grant #' is 02160-SVP17-18323-4, and the 'Active/Inactive' status is 'Active'. There is a checkbox for 'Grant contains performance measures?' which is checked. The 'Start date' is 07/01/2016, the 'End Date' is 06/30/2017, the 'Issued Date' is 06/27/2016, and the 'Date entered' is 08/19/2016. The 'Grant' title is 'State Supervised Visitation Program FY 2017'. The 'Title/Description' field is empty. The '\*Address' is 2, and the 'Accounting Dept' is listed. The 'City' is Manchester, the 'State' is NH, and the 'Zip' is 03105-0448. The 'BU Contact Name' is Brochu, Carol, and the 'Phone' is 2411250 x107. The 'General Comments' field is empty. The 'Total Amount' is 32,152.00.

Completed Review Page - Single Audit Required

Award

Review

GRANT TRACKING MODULE

Review - Used for Federal Grants Only

Grantee Supplier ID: 0000018323    Child & Family Services of New Hampshire    Federal Grantee Fiscal Year End Month: 12

Audit Section

Find | View All    First 3 of 4 Last

☒ Subrecipient Annual Report Received    ☐ Delinquent    Fiscal Year: 2016

☐ Annual Report Extension    Ext. date:    Comments 1

Granted

Audit Required?

Yes

    Comments 2

Primary 03440    Children and Families

Pass-Through:    Dates

Comments on Findings    ☒ Audit Received    06/19/2017

Audit received by IAG mm- no findings    ☒ Audit Reviewed    07/05/2017

☒ Audit Accepted    07/11/2017

☐ Mgt. Decision Letter Issued

☐ Audit Contains Findings/Issues

☐ Corrective Action Plan Requested

☐ Corrective Action Plan Received

Total Amount

Expenditures Section

Find | View All    First 1 of 1 Last

CFDA Number	Granting Agency	Grant Number	Expended Amount
			0.00

Attachments

Sequence	Attached File	Date Added	View
1	1 18323.pdf	02/15/2017	<div>View</div>

Save

Return to Search

Notify

Award | Review

Single audit is required: Reporting expenditures is optional on the Subrecipient Annual Report. Therefore, that section is left blank on this page when it is entered by Finance & Management.

## Completed Review Page - Single Audit Not Required

GRANT TRACKING MODULE

Review - Used for Federal Grants Only

Grantee Supplier ID: 000008219

Association of Africans Living in

Federal Grantee Fiscal Year End Month: 12

Audit Section

Find | View All

First 11 of 13 Last

☒ Subrecipient Annual Report Received

Rev. ☒ 10/11/2016

☐ Delinquent

Fiscal Year: 2015

☐ Annual Report Extension

Ext. date:

Comments 1

Granted

Audit Required? No

Comments 2

Primary 03420 Health

Pass-Through: Comments on Findings

☐ Audit Received

☐ Audit Reviewed

☐ Audit Accepted

☐ Mgt. Decision Letter Issued

☐ Audit Contains Findings/Issues

☐ Corrective Action Plan Requested

☐ Corrective Action Plan Received

Dates

Total Amount \$733,950.91

Expenditures Section

Find | View All

First 1 of 1 Last

CFDA Number

Granting Agency

Grant Number

Expended Amount 733,950.91

Attachments

Sequence	Attached File	Date Added	View
1	1 0805_001_4.pdf	02/23/2016	View
2	2 8219_2015.pdf	10/11/2016	View

The Expenditures section is used by Finance & Management to record expenditures reported on the Subrecipient Annual Report, a copy of which may be downloaded from the Attachments section. The total expenditures are entered here as they were submitted by the subrecipient, and the data *has not been audited or verified in any manner*.

Note: For fiscal years ending prior to 12/31/2015, detailed expenditure information was entered in this section, and there are no attachments available.

**Data Entry:** For grantees that do not require a single audit, the only data entry on the Review page pertains to general monitoring. This information should be entered by pass-through entities in the **Comments on Findings** box.

In the example above, the supplier revised their report, and both versions are available for download and review. The most recent report is identified by the last Sequence number.

Total expenditures are entered in the Expenditures section when a Single Audit is not required.

## Entering Grant Review/Audit Data

**Situation when this function is used:** To enter single audit review information and other monitoring activities. (When a single audit is not required, no entry is necessary.)

**Navigation:** Grant Tracking WorkCenter > Enter Grant Data

See Open a Grantee Record to find a supplier.

The Award page displays, click the **Review** Tab.

The screenshot shows the 'Award' page in the Grant Tracking Module. The 'Review' tab is highlighted with a red box. The page displays grant information for 'Brattleboro Retreat' with a Gantee Supplier ID of 0000000086. The 'Award Information' section includes fields for Business Unit (03420), BU Name (Health), Grant # (03420-5644S), Active/Inactive status (Active), and Grant contains performance measures? (Yes/No). It also shows dates for Start date (07/01/2010), End Date (06/30/2011), Issued Date (07/01/2010), and Date entered (07/01/2010). The Title/Description is 'Hospital Preparedness Program'. The Address is '1 Anna Marsh Lane', City is 'Brattleboro', State is 'VT', and Zip is '05302'. The BU Contact Name is 'Bronson, Mary' and the Phone is '657-4237'. The Total Amount is '17,710.00'.

### Audit Section

The screenshot shows the 'Audit Section' of the Grant Tracking Module. It includes fields for Subrecipient Annual Report Received (checked), Annual Report Extension Granted (unchecked), Audit Required? (No), and Ext. date. There are also checkboxes for Delinquent and Fiscal Year (2004). The page includes a 'Comments 1' box and a 'Comments 2' box. The page is titled 'Audit Section' and has a 'Find | View All' button. The page number is '1 of 14'.

**This section is completed by Finance & Management and is grayed out for all other users.**

A single audit report is due within 9 months after the end of the grantee's fiscal year. Once the audit report has been received, the fields on this page are updated by the primary pass-through entity.

*Note: Per Bulletin 5, pass-through entities are expected to keep documentation for all monitoring activities, including single audit review, in their official grant files. Although it may be referenced on this page in GT module, the official documentation resides in the grant file and must be available for audit as required. The Comments on Findings box on this page may include brief comments from any pass-through entity.*

## Audit Review Section

Primary		03420	Health	Dates	
Pass-Through:			<input type="checkbox"/> Audit Received		<input type="text"/>
Comments on Findings			<input type="checkbox"/> Audit Reviewed		<input type="text"/>
			<input type="checkbox"/> Audit Accepted		<input type="text"/>
			<input type="checkbox"/> Mgt. Decision Letter Issued		<input type="text"/>
			<input type="checkbox"/> Audit Contains Findings/Issues		
			<input type="checkbox"/> Corrective Action Plan Requested		<input type="text"/>
			<input type="checkbox"/> Corrective Action Plan Received		<input type="text"/>

The Audit Review section is updated by the **primary pass-through** to document their single audit report review. This section is only available to be updated when **Audit Required = YES**

Audit monitoring information is entered on this page, checking all applicable checkboxes and entering comments as applicable. The Audit Received, Reviewed & Accepted boxes are mandatory for review to be considered complete.

*Checkboxes should be updated as review progresses. It is not expected that all checkboxes will be completed at the same time.*

### Review Checkboxes

Check the applicable **checkboxes**. Current date automatically populates when a checkbox is checked which may be changed if necessary.

- Check the **Audit Received** checkbox – When the audit is received, even if not reviewed. Adjust the date received if necessary.
- Check the **Audit Reviewed** checkbox – When audit report has been reviewed. Adjust the date reviewed if necessary.
- Check the **Audit Accepted** checkbox – If there are no findings, this may be checked when the Audit Review is complete. If there are findings, the acceptance of the audit may need to wait for further review of the corrective action plan or additional responses from the subrecipient. This will vary on a case-by-case basis. Update the date accepted as necessary.
- Check the **Mgt. Decision Letter Issued** checkbox – When/if a Management Decision Letter has been issued to the subrecipient. Not all audit reports require the issuance of a Management Decision Letter, so this field may be left blank in some instances.
- Check the **Audit Contains Findings** checkbox – If the audit report contains findings related to the State of Vermont's pass-through grants.
- Check the **Corrective Action Plan Requested** checkbox – When/if a corrective action plan is requested from the grantee. If the audit report itself includes a corrective action plan, request for a separate plan may not be necessary.

- Check the **Corrective Action Plan Received** checkbox – When a corrective action plan was received. It is not necessary to check this box if the audit report contained a corrective action plan.
- Enter comments in the **Comments on Findings** box as necessary.
- When all entry is complete, click **Save**.

### Expenditures Section

This section is usually left blank when an audit is required.

Total Amount

Expenditures Section

Find | View All    First 1 of 1 Last

CFDA Number	Granting Agency	Grant Number	Expended Amount
			0.00

### Attachments

Attachments			
Sequence	Attached File	Date Added	View
1	1 0787_001_2.pdf	02/11/2016	View

A scanned copy of the Subrecipient Annual report is attached to the fiscal year’s record. To download and view the report, click the **View** button.

Completed Review Page

Award

Review

GRANT TRACKING MODULE

Review - Used for Federal Grants Only

Grantee Supplier ID: 0000018323 Child & Family Services of New Hampshire

Federal Grantee Fiscal Year End 12

Month:

Audit Section

Find | View All

First 2 of 4 Last

☒ Subrecipient Annual Report Received

☐ Annual Report Extension Granted

Audit Required? Yes

Rev. ☐ 02/12/2018

Ext. date:

Comments 2

☐ Delinquent

Fiscal Year: 2015

Comments 1

Primary Pass-Through: 03440 Children and Families

Comments on Findings

Audit received by IAG mm- no findings

☒ Audit Received

☒ Audit Reviewed

☒ Audit Accepted

☐ Mgt. Decision Letter Issued

☐ Audit Contains Findings/Issues

☐ Corrective Action Plan Requested

☐ Corrective Action Plan Received

Dates

04/29/2016

05/09/2016

05/09/2016

Total Amount

Expenditures Section

Find | View All

First 1 of 1 Last

CFDA Number

Granting Agency

Grant Number

Expended Amount

0.00

Attachments

Sequence

Attached File

Date Added

View

1

1 0792\_001\_4.pdf

02/12/2016

View

Save

Return to Search

Notify

Award | Review