



## **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**  
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## Revisions to Manual

### 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:

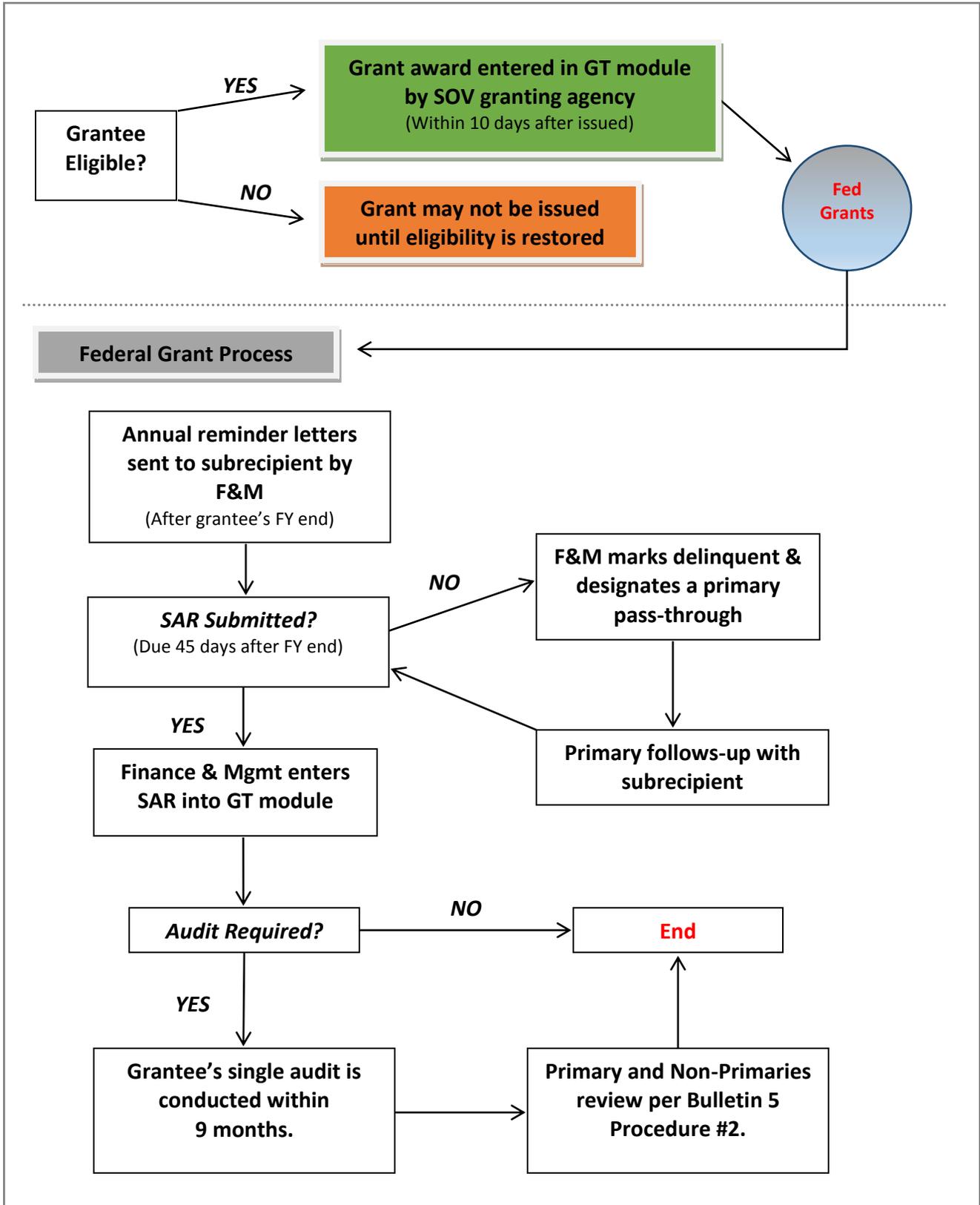
- Monthly, the Department of Finance & Management generates letters to all grantees whose fiscal year ended in the prior month. These letters request that they submit the Subrecipient Annual Report to Finance & Management within 45 days after the end of their fiscal year.
- Completed reports are entered 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.

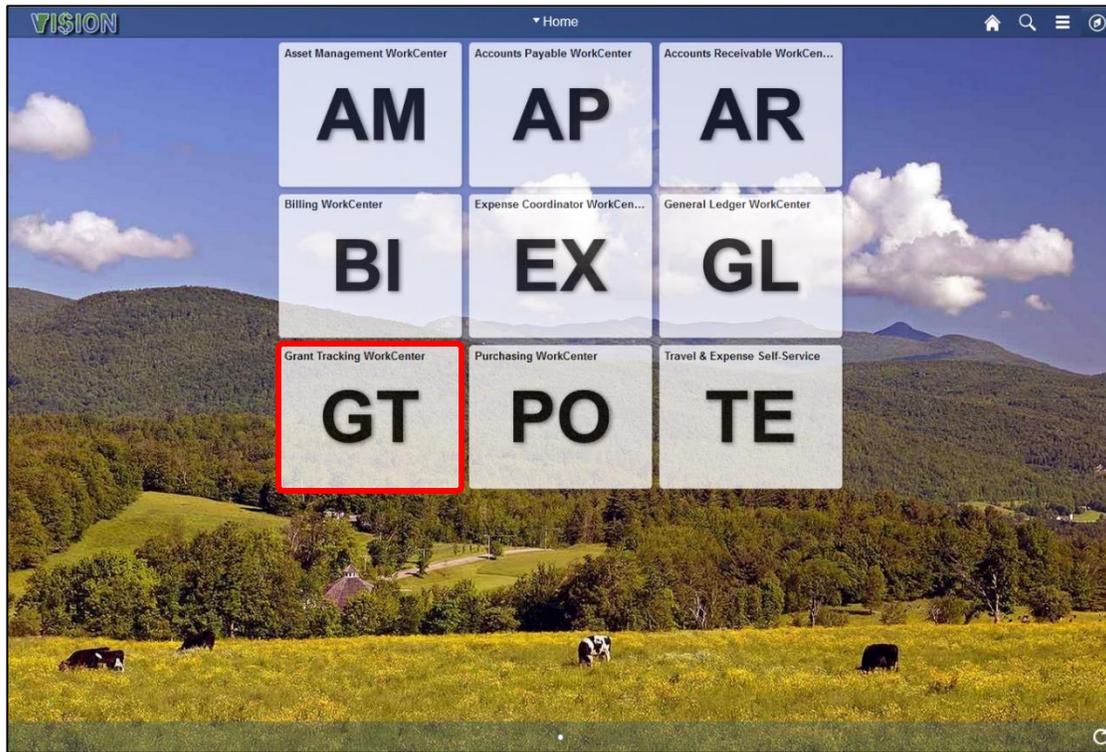
Refer to the [Grant Guidelines](#) page of the Finance & Management website for related procedures and information pertaining to grant issuance and monitoring.

## Grant Process Flow

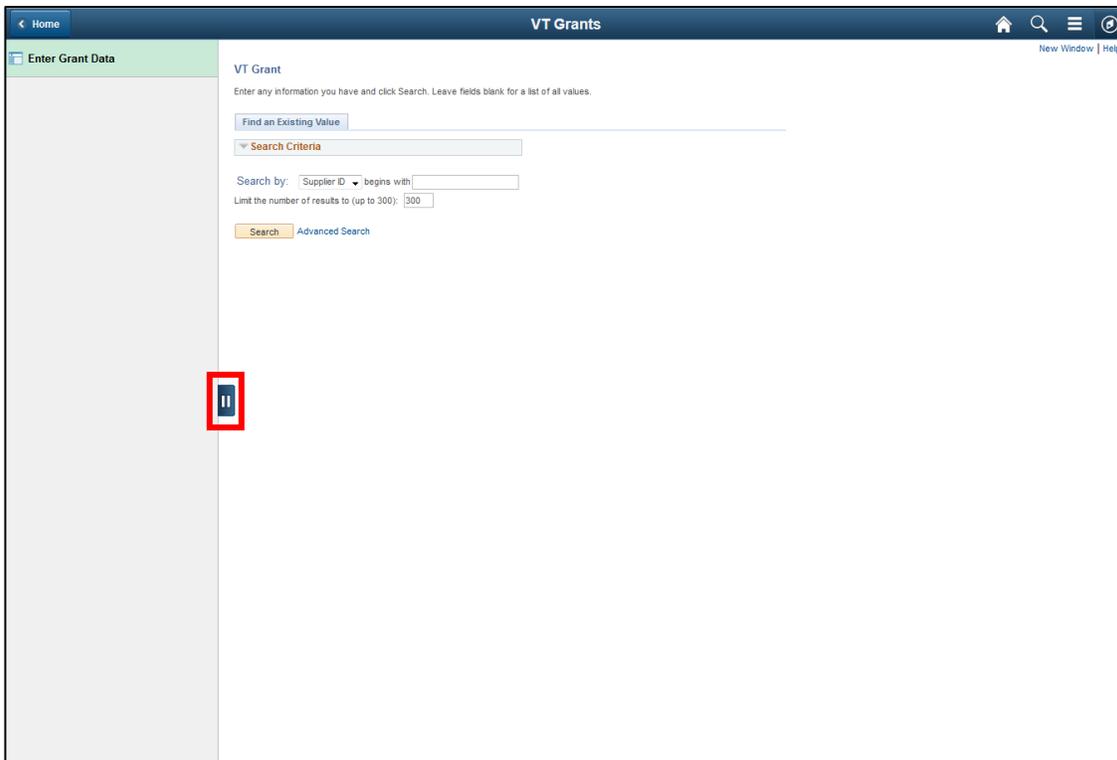


# Grant Tracking WorkCenter

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

**GRANT TRACKING MODULE**  
Grant Awards

Active/Inactive: Active

Grantee Supplier ID: 0000041553 Supplier name: Lamoille County Clerk Federal Grantee Fiscal Year End Month:

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

Business Unit:  BU Name:

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

Start date:  End Date:  Issued Date:  Date entered: 10/09/2018

Grant Title/Description:

\*Address:  Box 490

City: Hyde Park State: VT Zip: 05655

BU Contact Name:  Phone:

General Comments:  Total Amount: 0.00

**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:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Sequence	Attached File	Date Added	Add
1	1	10/09/2018	<input type="button" value="Add"/>

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

Award | **Review**

### GRANT TRACKING MODULE

#### 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  Rev.  
 Annual Report Extension Granted  
 Audit Required?

Delinquent Fiscal Year:  
 Ext. date:   
 Comments 2

Comments 1

Primary Pass-Through: Comments on Findings

<input type="checkbox"/> Audit Received	Dates <input type="text"/>
<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"/>

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
1	1	10/09/2018

Save
 Return to Search
 Previous in List
 Next in List
 Notify

Award | **Review**

## 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 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.

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

The screenshot shows the 'VT Grant' search page. At the top, it says 'Enter any information you have and click Search. Leave blank for all.' Below this is a 'Find an Existing Value' button. Underneath is a 'Search Criteria' section with a dropdown arrow. The search criteria are set to 'Search by: Supplier ID' and 'begins with 0000041553'. There is a checkbox for 'Case Sensitive' and a text box for 'Limit the number of results to (up to 300): 300'. At the bottom, there are 'Search' and 'Advanced Search' buttons. Two red callout boxes with arrows point to the search criteria and the 'Search' button. Callout 1 says 'Enter a 10-digit (including the leading zeros) valid supplier ID number'. Callout 2 says '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:

The screenshot shows the 'VT Grant' search page. At the top, it says 'Enter any information you have and click Search. Leave blank for all.' Below this is a 'Find an Existing Value' button. Underneath is a 'Search Criteria' section with a dropdown arrow. The search criteria are set to 'Search by: Name 1' and 'begins with Child%'. There is a checkbox for 'Case Sensitive' and a text box for 'Limit the number of results to (up to 300): 300'. At the bottom, there are 'Search' and 'Advanced Search' buttons. Two red callout boxes with arrows point to the search criteria and the 'Search' button. Callout 1 says 'Select Name 1 from the drop-down menu and enter your search criteria.' Callout 2 says '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	
View All	First 1-22 of 22 Last
Name 1	Supplier ID
Child & Adult Care Food Program National	0000051323
Child & Family Services of New Hampshire	0000018323
Child Care Center In Norwich	0000000311
<b>Child Care Resource</b>	<b>0000006962</b>
Child Care of the Berkshires, Inc.	0000328385
Child Development Services	0000363180
Child First Advocacy Center	0000004360
Child Heart Associates LLC	0000334982
Child Support-Garnishments	0000047458
Child Support-Satellite Payments	0000044026
Child Trends Incorporated	0000340934
Child Welfare League of America	0000008910
Children and Family Futures, Inc	0000348570
Children's Choice, Inc.	0000361763
Children's Hospital Corp	0000042114

**NOTE:** If your search by name produces no results, call VISION Finance Support at 828-6700, Option 2, 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:

Award | Review

### 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	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'. The main heading is 'Grant Awards'. On the right, there is a dropdown menu for 'Active/Inactive' set to 'Active' and a 'SEARCH' button. Below this, the 'Grantee Supplier ID' is 0000000086 and the 'Supplier name' is Brattleboro Retreat. The 'Fiscal Year End' is 12. 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/Inactive' dropdown with the text 'Active grants are visible'. The 'Award Information' section shows 'Business Unit: 03420', 'Grant #: 03420-5644S', 'Active/Inactive: Active', and 'Grant contains performance measures? Yes No'. 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'. At the bottom right, there is a pagination control showing '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'. The main heading is 'Grant Awards'. On the right, there is a dropdown menu for 'Active/Inactive' set to 'Inactive' and a 'SEARCH' button. 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, the 'Grantee Supplier ID' is 0000000086 and the 'Supplier name' is Brattleboro Retreat. The 'Federal Grantee Fiscal Year End' is 12. A blue callout box points to the 'Active/Inactive' dropdown with the text 'Inactive grants are visible'. The 'Award Information' section shows 'Business Unit: 02240', 'Grant #: 02240-ASEP-REN-019', 'Active/Inactive: Inactive', and 'Grant contains performance measures? Yes No'. 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'. At the bottom right, there is a pagination control showing '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:

The screenshot shows the 'Award' and 'Review' tabs at the top. A red callout box with an arrow points to the 'Active/Inactive' dropdown menu, which is currently set to 'Both'. A red box highlights the 'SEARCH' button next to it. Below the callout, the 'Grant Information' section is visible, showing 'Business Unit: 02240', 'BU Name: Public Service Department', and 'Grant #: 02240-ASEP-REN-019'. The 'Active/Inactive' dropdown is 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'. At the top right, there is a 'Federal Grantee Fiscal Year End' field set to '12' and a 'Month' field. A pagination bar shows 'First', '1 of 36', and 'Last'.

*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.

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 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: 0000040598 Supplier name: Waterbury Town Treasurer

Award Information

Business Unit: 01130 BU Name: Libraries

Grant #: 01130-COURIER-1.68 Active/Inactive: Active Grant contains performance measures? Yes No

Start date: 01/25/2016 End Date: 08/31/2016 Issued Date: 03/23/2016 Date entered: 03/23/2016

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 in which order the row is inserted.

A new, blank award row will appear:

[Award](#) | [Review](#)

### GRANT TRACKING MODULE

#### Grant Awards

Active/Inactive: Active

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:  BU Name:

Grant #:  Active/Inactive: Active 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    First 1 of 1 Last

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

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

Sequence	Attached File	Date Added	Add
1		11/13/2018	<input type="button" value="Add"/>

[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 the following fields:

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

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.

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' interface. At the top, there are tabs for 'Award' and 'Review'. The main header includes 'GRANT TRACKING MODULE Grant Awards', 'Active/Inactive' dropdown set to 'Active', and a 'SEARCH' button. Below this, there are fields for 'Grantee Supplier ID: 0000040598', 'Supplier name: Waterbury Town Treasurer', and 'Federal Grantee Fiscal Year End' set to '12' with a 'Month:' label. The 'Award Information' section contains a search bar for 'Business Unit' (01130) and 'BU Name: Libraries'. The 'Grant #' field is '01130-TRAINING-02', with 'Active/Inactive' set to 'Active' and a 'Grant contains performance measures?' checkbox checked. Dates for 'Start date', 'End Date', 'Issued Date', and 'Date entered' are provided. The 'Title/Description' is 'Training Test'. The '\*Address:' field is populated with 'Waterbury Public Library'. Below this, 'City: Waterbury', 'State: VT', and 'Zip: 05676' are shown. The 'BU Contact Name:' is 'Test,Robert' and 'Phone:' is '828-4047'. A 'General Comments:' text area is present, and the 'Total Amount:' is '4,500.00'. The 'Grant Lines' section shows a table with columns for '\*Fund Type', '\*Amount', 'CFDA #', 'S.A.', 'FFATA', 'Amend.', 'Amend.#', 'Amend. date', and 'Other Fund Type Description:'. The 'Attachments' section shows a table with columns for 'Sequence', 'Attached File', 'Date Added', and 'Add' buttons. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.

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

**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: 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:
S-Fund	4,500.00		<input 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		11/13/2018	Add

Save Return to Search Notify

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:

**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:
Other	4,500.00		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

**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		10/10/2018	<b>Add</b>							

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

**File Attachment** ×

[Help](#)

**Browse...** Test Grant Doc.docx

**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	<b>View</b>	<b>Delete</b>						

18. Click **Save**:

**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 Title/Description: Training Test

\*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:
S-Fund	4,500.00		<input 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		11/13/2018	<b>Add</b>

**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 [v] [SEARCH]

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:

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' interface. At the top, there are tabs for 'Award' and 'Review'. Below the title, there are search and filter options, including a dropdown for 'Active/Inactive' set to 'Active' and a 'SEARCH' button. The main form area contains fields for 'Grantee Supplier ID: 0000357413', 'Supplier name: Adult & Child Mental Health Center, Inc', and 'Federal Grantee Fiscal Year End Month: 12'. The 'Award Information' section includes fields for 'Business Unit: 03460', 'BU Name: Disabilities Aging Ind. Living', 'Grant #: 03460-TRN-06-01', 'Active/Inactive: Active', and 'Grant contains performance measures? Yes (selected) No'. There are also date pickers for 'Start date: 07/01/2018', 'End Date: 06/30/2019', 'Issued Date: 10/11/2018', and 'Date entered: 10/11/2018'. A red callout box with the text 'Click the + to add a new award row' points to a red-bordered box containing a '+' sign and a '-' sign in the upper right corner of the form.

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:

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' interface after a new award row has been added. The 'Award Information' section is now mostly blank, with only 'Date entered: 11/11/2018' populated. The 'Grant Lines' section is also blank. The 'Attachments' section shows a table with one row: Sequence 1, Attached File, Date Added 11/11/2018, and an 'Add' button. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. The 'Award' and 'Review' tabs are visible at the top.

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' form. It includes fields for Business Unit, Grant #, Active/Inactive status, performance measures, start/end/issued dates, grant title, address, contact information, and a table for Grant Lines. Red circles with numbers 1 through 8 are placed over the form, with arrows pointing to the following fields: 1. Business Unit, 2. Grant #, 3. Active/Inactive dropdown, 4. Grant contains performance measures? radio buttons, 5. Start date, 6. End date, 7. Issued date, and 8. Grant Title/Description.

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.

The screenshot shows the 'Award Information' section of the Grant Tracking Module. The interface includes fields for Business Unit (03460), BU Name (Disabilities Aging Ind. Living), Grant # (03460-TRN-06-01), and various dates. The address field is populated with '8320 Madison Ave' in Indianapolis, IN, with a zip code of 46227. The BU Contact Name is 'Test,Robert' and the phone number is '828-0407'. The Total Amount is 6,300.00. The Grant Lines section shows one line with a Fund Type of 'F-Fund', Amount of 6,300.00, and CFDA # 84.026. The Attachments section is currently empty.

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

The screenshot shows the 'Grant Lines' section of the 'GRANT TRACKING MODULE'. The 'Grant Lines' table has the following data:

*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"/>				

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	<input type="button" value="Add"/> <input type="button" value="+"/> <input type="button" value="-"/>							

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

**File Attachment** x

[Help](#)

Test Grant Doc.docx

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	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="button" value="+"/>	<input type="button" value="-"/>				

Click **Save**:

**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

---

**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	<input type="button" value="View"/>	<input type="button" value="Delete"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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.*

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' page. At the top, there is a search bar with 'Active/Inactive' set to 'Active' and a 'SEARCH' button. Below this, the 'Grantee Supplier ID' is 0000040598 and the 'Supplier name' is 'Waterbury Town Treasurer'. A red box highlights the 'Federal Grantee Fiscal Year End Month' field, which contains the value '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:**

The screenshot shows the 'Award Information' section of the Grant Awards page. It displays a list of existing grants for the supplier 'Behavioral Health Network of Vermont'. The first grant is highlighted, showing details like 'Business Unit: 03150', 'Grant #: 03150-A5036-FY14', and 'Start date: 06/01/2013'. A red callout box with a white border points to a '+' button in the table's column headers, with the text '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:**

The screenshot shows the 'GRANT TRACKING MODULE' interface for 'Grant Awards'. At the top, there are tabs for 'Award' and 'Review', and a 'SEARCH' button. Below this, the 'Active/Inactive' status is set to 'Active'. The main header displays 'Grantee Supplier ID: 0000267536', 'Supplier name: Behavioral Health Network of Vermont', and 'Federal Grantee Fiscal Year End Month: 6'. The 'Award Information' section includes fields for 'Business Unit', 'BU Name', 'Grant #', 'Active/Inactive' (set to 'Active'), and a checkbox for 'Grant contains performance measures?'. It also features date pickers for 'Start date', 'End Date', and 'Issued Date', along with a 'Date entered' field showing '10/11/2018'. The 'Grant' title is 'Training', and the 'Title/Description' is empty. The address is '137 Elm Street', 'Montpelier, VT 05602'. The 'BU Contact Name' is 'Test, Robert' and the 'Phone' is '828-0407'. The 'General Comments' field is empty, and the 'Total Amount' is '0.00'. Below this is the 'Grant Lines' section with a table for adding new lines. At the bottom, there is an 'Attachments' table with one entry and a 'Save' button.

This screenshot is an annotated version of the previous one, with red circles containing numbers 1 through 12 and arrows pointing to specific fields. The annotations are as follows: 1 points to the 'Business Unit' field (03410); 2 points to the 'Grant #' field (03410-TRN-07-01); 3 points to the 'BU Name' field (Vermont Health Access); 4 points to the 'Grant contains performance measures?' checkbox (checked 'Yes'); 5 points to the 'Start date' field (01/01/2018); 6 points to the 'End Date' field (12/31/2018); 7 points to the 'Issued Date' field (10/11/2018); 8 points to the 'BU Contact Name' field (Test, Robert); 9 points to the 'General Comments' field; 10 points to the 'Title/Description' field; 11 points to the 'Total Amount' field (0.00); and 12 points to the 'Date entered' field (10/11/2018).

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 = 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

*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"/>			

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 a single row in the 'Grant Lines' 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"/>			

The bottom screenshot shows a table with four rows:

*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:

**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 2 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: 12/31/2018 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: **Total Amount: 25,775.00**

**Grant Lines** Find | View All First 1-4 of 4 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"/>			
GC-Fund	100.00	93.778	<input type="checkbox"/>	<input type="checkbox"/>			
S-Fund	100.00		<input type="checkbox"/>	<input type="checkbox"/>			
Other	75.00		<input type="checkbox"/>	<input type="checkbox"/>			Test Fund

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

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

Save Return to Search Notify

## Attachments Section

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

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

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

**File Attachment** X

Help

Browse... Test Grant Doc.docx

Upload Cancel

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

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/Inactive: Active

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

Award Information
Find | View All    First 2 of 4 Last

Business Unit:     BU Name: Vermont Health Access

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

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

Grant Title/Description:

\*Address:  137 Elm Street

City: Montpelier    State: VT    Zip: 05602

BU Contact Name:     Phone:

General Comments:

Total Amount: 25,775.00

Grant Lines
Find | View All    First 1-4 of 4 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

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	<input type="button" value="View"/>	<input type="button" value="Delete"/>
2	2 Test_Grant_Doc.docx	10/11/2018	<input type="button" value="View"/>	<input type="button" value="Delete"/>
3	3 Test_Grant_Doc.docx	10/11/2018	<input type="button" value="View"/>	<input type="button" value="Delete"/>

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 in 'Review' mode. The main title is 'Grant Awards'. The interface is divided into several sections:

- Grant Information:** Includes fields for Business Unit (03410), BU Name (Vermont Health Access), Grant # (03410-TRN-07-01), and various dates (Start date: 01/01/2018, End Date: 03/31/2019, Issued Date: 10/11/2018, Date entered: 10/11/2018). It also has checkboxes for 'Grant contains performance measures?' (Yes/No) and 'FFATA'.
- Award Information:** Contains a search bar and navigation controls: 'Find | View All | First | 3 of 4 | Last'. A red box highlights these controls.
- Grant Lines:** A table with columns: \*Fund Type, \*Amount, CFDA #, S.A., FFATA, Amend., Amend.#, Amend. date, and Other Fund Type Description. It lists three rows: F-Fund (25,500.00), GC-Fund (100.00), and S-Fund (100.00).
- Attachments:** A table with columns: Sequence, Attached File, Date Added, View, and Delete. It lists three attachments: '1 Test\_Grant\_Doc.docx', '2 Test\_Grant\_Doc.docx', and '3 Test\_Grant\_Doc.docx'.

At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. The footer shows 'Award | Review'.

The screenshot displays the 'GRANT TRACKING MODULE' interface for 'Grant Awards'. It includes a search bar, filters for 'Active/Inactive' and 'Active', and a 'SEARCH' button. The main area shows 'Award Information' for Business Unit '03410' and 'Vermont Health Access'. The 'Grant #' is '03410-TRN-07-01' and is 'Active'. The 'Start Date' is '01/01/2018' and the 'End Date' is '03/31/2019'. The 'Grant Title/Description' is 'Training'. The 'BU Contact Name' is 'Test,Robert' and the 'Phone' is '828-0407'. The 'General Comments' section contains the text 'Amendment #1: Extend grant period to 3/31/2019 and add Fed funds of \$40,000'. The 'Grant Lines' table lists four fund types: F-Fund (25,500.00), GC-Fund (100.00), S-Fund (100.00), and F-Fund (40,000.00). The 'Attachments' section shows three files named 'Test\_Grant\_Doc.docx'. Red circles with numbers 1-5 highlight specific fields: 1. End Date, 2. General Comments, 3. Plus sign in Grant Lines table, 4. Fund Type and Amount columns, 5. Amend checkbox and Amend Date field.

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.

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

Attachments								Personalize   Find   View 3   [Print] [Refresh]		First	1-4 of 4	Last
Sequence	Attached File	Date Added	Add	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	+	-					
4	4	10/13/2018	Add			+	-					

- Click **Browse** to find your attachment and click **Upload**:

**File Attachment** X

[Help](#)

Browse... Amended Test Grant Doc.d

Upload Cancel

- Click **Save**:

**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"/>			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 | [Print] [Refresh]    First 1-4 of 4 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	+	-
4	4 Amended_Test_Grant_Doc.docx	10/13/2018	View	Delete	+	-

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 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 displays the 'GRANT TRACKING MODULE Grant Awards' form. Key elements include:

- 1:** The 'Active/Inactive' dropdown menu is set to 'Inactive'.
- 2:** The 'End Date' field is set to 11/09/2018.
- 3:** The 'General Comments' field contains the text 'Grant inactivated 11/9/2018 - project cancelled'.
- 4:** The 'Save' button is highlighted with a red box.

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 Fiscal Year End: 6  
Month:

Award Information: 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/ROSIRUTLAND

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

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

The screenshot displays the 'GRANT TRACKING MODULE' interface for 'Grant Awards'. At the top, there are tabs for 'Award' and 'Review', and a search bar with a 'SEARCH' button. Below this, the 'Active/Inactive' status is set to 'Active'. The main header shows 'GRANT TRACKING MODULE' and 'Grant Awards'. The 'Grantee Supplier ID' is 0000004360, the 'Supplier name' is 'Child First Advocacy Center', and the 'Federal Grantee Fiscal Year End' is 6. The 'Award Information' section includes fields for 'Business Unit' (02130), 'BU Name' (State's Attorneys and Sheriffs), 'Grant #' (02130-2018-VTSIU-PS-06), 'Active/Inactive' (Active), and 'Grant contains performance measures?' (Yes). It also shows 'Start date' (07/01/2017), 'End Date' (06/30/2018), 'Issued Date' (07/05/2017), and 'Date entered' (07/05/2017). The 'Grant' field contains 'CHILD FIRST ADVOCACY/ROSVRUTLAND'. The 'Title/Description' field is empty. The '\*Address' field contains '2 PO Box 6822'. The 'City' is 'Rutland', 'State' is 'VT', and 'Zip' is '05702-6822'. The 'BU Contact Name' is 'BERNARDINI, BARBARA' and the 'Phone' is '802/828-2892'. The 'General' field contains 'FY18 1ST INSTALLMENT' and the 'Total Amount' is '62,315.00'. The 'Grant Lines' section shows a table with one row: '\*Fund Type' (G-Fund), '\*Amount' (62,315.00), 'CFDA #', 'S.A.', 'FFATA', 'Amend.', 'Amend.#', 'Amend. date', and 'Other Fund Type Description'. The 'Attachments' section shows a table with one row: 'Sequence' (1), 'Attached File', 'Date Added' (10/13/2018), and 'Add' button. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. The 'Save' button is highlighted with a red box.

**⊗ 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.

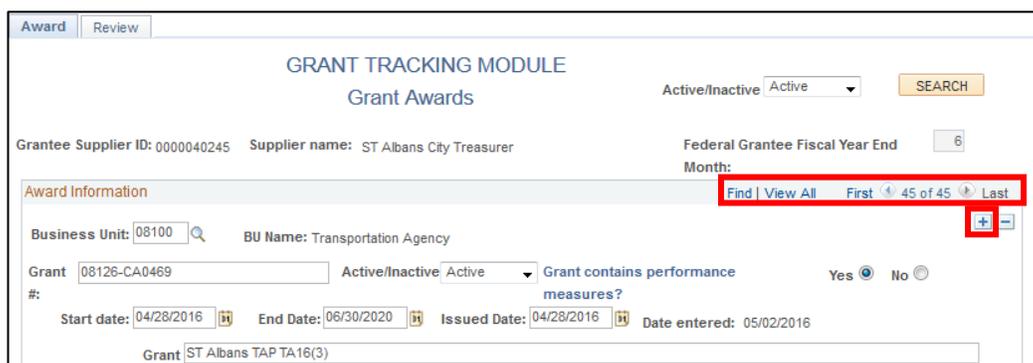
**Example:** A grant to the Town of St. Albans was incorrectly entered under the City of St. Albans’s supplier number.

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

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

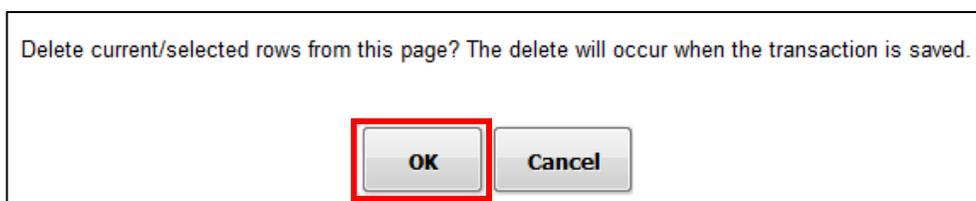
Deleting the Original Grant Award:

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:



The screenshot shows the 'GRANT TRACKING MODULE' interface. At the top, there are tabs for 'Award' and 'Review'. Below the title, there are filters for 'Active/Inactive' (set to 'Active') and a 'SEARCH' button. The main area displays 'Grant Awards' for 'Grantee Supplier ID: 0000040245' and 'Supplier name: ST Albans City Treasurer'. The 'Award Information' section includes fields for 'Business Unit' (08100), 'BU Name' (Transportation Agency), 'Grant #' (08126-CA0469), 'Active/Inactive' (Active), and 'Grant contains performance measures?' (Yes/No). There are also date fields for 'Start date', 'End Date', 'Issued Date', and 'Date entered'. At the bottom, it shows 'Grant ST Albans TAP TA16(3)'. In the top right of the award list area, there are navigation controls: 'Find | View All | First | 45 of 45 | Last'. The 'View All' button and the minus sign icon are highlighted with red boxes.

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



The screenshot shows a confirmation dialog box with the text: 'Delete current/selected rows from this page? The delete will occur when the transaction is saved.' Below the text are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

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.)

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' interface. At the top, there are tabs for 'Award' and 'Review'. The page title is 'GRANT TRACKING MODULE Grant Awards'. Below the title, there are fields for 'Active/Inactive' (set to 'Active') and a 'SEARCH' button. The main content area is divided into several sections: 'Award Information', 'Grant Lines', and 'Attachments'. The 'Award Information' section includes fields for 'Business Unit' (08126), 'BU Name' (AOT Project Development), 'Grant #' (08126-CA0194), 'Active/Inactive' (Active), 'Grant contains performance measures?' (Yes), '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' (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), and 'Total Amount' (2,213,904.00). The 'Grant Lines' section is a table with columns: '\*Fund Type', '\*Amount', 'CFDA #', 'S.A.', 'FFATA', 'Amend.', 'Amend.#', 'Amend. date', and 'Other Fund Type Description:'. It contains two rows of data. The 'Attachments' section is a table with columns: 'Sequence', 'Attached File', 'Date Added', and 'Add'. It contains one row of data. At the bottom left, there are three buttons: 'Save' (highlighted with a red box), 'Return to Search', and 'Notify'. The bottom of the page shows 'Award | Review'.

Re-entering the award under the correct supplier number:

See Open 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:

The screenshot shows the 'GRANT TRACKING MODULE Grant Awards' interface. At the top, there are tabs for 'Award' and 'Review'. The page title is 'GRANT TRACKING MODULE Grant Awards'. Below the title, there are fields for 'Active/Inactive' (set to 'Active') and a 'SEARCH' button. The main content area is divided into several sections: 'Award Information', 'Grant Lines', and 'Attachments'. The 'Award Information' section includes fields for 'Business Unit' (01140), 'BU Name' (Tax), 'Grant #' (01140-99STALBANSTOWN), 'Active/Inactive' (Active), 'Grant contains performance measures?' (Yes), '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' (PO Box 37), 'City' (ST Albans Bay), 'State' (VT), 'Zip' (05481), 'BU Contact Name' (Lewis, Alexa), 'Phone' (828 0587), 'General Comments', and 'Total Amount' (413.69). The '+' icon in the 'Award Information' section is highlighted with a red box. The bottom of the page shows 'Award | Review'.

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**:

The screenshot displays the 'GRANT TRACKING MODULE' interface. At the top, there are tabs for 'Award' and 'Review'. The main header shows 'Grant Awards' and a search bar. Below this, the 'Grantee' information is listed: Supplier ID: 0000040253, Supplier name: ST Albans Town Treasurer, and Federal Grantee Fiscal Year End: 6. The 'Award Information' section includes fields for Business Unit (08100), BU Name (Transportation Agency), Grant # (08126-CA0469), and various dates (Start: 07/28/2016, End: 06/30/2020, Issued: 04/28/2016, Date entered: 10/15/2018). The 'General Comments' box is highlighted with a red rectangle and contains the text: 'GRANT ORIGINALLY ENTERED UNDER VENDOR #40245 IN ERROR ON 5/2/2016.' The 'Grant Lines' table shows one line with Fund Type 'F-Fund', Amount '300,000.00', CFDA # '20.205', and S.A. checked. The 'Attachments' table is empty. At the bottom, the 'Save' button is highlighted with a red rectangle.

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 'Review' tab selected in the 'Award' section of the 'GRANT TRACKING MODULE'. The page displays details for a grant award with the following information:

- Grant Awards** (Active/Inactive: Active)
- Grantee Supplier ID:** 0000018323
- Supplier name:** Child & Family Services of New Hampshire
- Federal Grantee Fiscal Year End Month:** 12
- Award Information:** Find | View All | First | 1 of 11 | Last
- Business Unit:** 02160 (BU Name: Crime Victims' Services Center)
- Grant #:** 02160-SVP17-18323-4 (Active/Inactive: Active)
- Grant contains performance measures?** Yes (selected) / No
- Start date:** 07/01/2016 | **End Date:** 06/30/2017 | **Issued Date:** 06/27/2016 | **Date entered:** 08/19/2016
- Grant Title/Description:** State Supervised Visitation Program FY 2017
- \*Address:** 2 Accounting Dept
- City:** Manchester | **State:** NH | **Zip:** 03105-0448
- BU Contact Name:** Brochu, Carol | **Phone:** 2411250 x107
- General Comments:** (Empty text area)
- Total Amount:** 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 Rev.  02/15/2017
 Delinquent

Fiscal Year: 2016

Annual Report Extension  
 Ext. date:

Comments 1

Comments 2

Primary 03440 Children and Families
Dates

Pass-Through:  
 Comments on Findings  
 Audit received by IAG mm- no findings

Audit Received 06/19/2017  
 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	<a href="#">View</a>

[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  
 **Audit Required?** No  Comments 2

Primary 03420 Health Dates  
 Pass-Through:  Audit Received   
 Comments on Findings  Audit Reviewed   
 Audit Accepted   
 Mgt. Decision Letter Issued   
 Audit Contains Findings/Issues   
 Corrective Action Plan Requested   
 Corrective Action Plan Received

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 the following information:

- GRANT TRACKING MODULE** / Grant Awards
- Active/Inactive: Active (dropdown)
- SEARCH button
- Grantee Supplier ID: 0000000086 / Supplier name: Brattleboro Retreat
- Federal Grantee Fiscal Year End: 12 / Month:
- Award Information** section with Find | View All | First | 1 of 23 | Last navigation.
- Business Unit: 03420 / BU Name: Health
- Grant #: 03420-5644S / Active/Inactive: Active / Grant contains performance measures?: Yes (radio) / No (radio)
- Start date: 07/01/2010 / End Date: 06/30/2011 / Issued Date: 07/01/2010 / Date entered: 07/01/2010
- Grant Title/Description: Hospital Preparedness Program
- \*Address: 9 / 1 Anna Marsh Lane
- City: Brattleboro / State: VT / Zip: 05302
- BU Contact Name: Bronson, Mary / Phone: 657-4237
- General Comments: (text area)
- Total Amount: 17,710.00

### Audit Section

The screenshot shows the 'Audit Section' in the Grant Tracking Module. The page displays the following information:

- Grantee Supplier ID: 0000000086 / Brattleboro Retreat
- Federal Grantee Fiscal Year End Month: 12
- Audit Section** with Find | View All | First | 1 of 14 | Last navigation.
- Rev.  Subrecipient Annual Report Received /  Delinquent / Fiscal Year: 2004
- Annual Report Extension / Ext. date: / Comments 1 (text area)
- Audit Granted: No / Comments 2 (text area)
- Audit Required?: (checkbox)

**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"/>
<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>			<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.

Expenditures Section				Total Amount
CFDA Number	Granting Agency	Grant Number	Expended Amount	
			0.00	

### Attachments

Sequence	Attached File	Date Added	View
1	1 0787_001_2.pdf	02/11/2016	<input type="button" value="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 Month: 12

Audit Section
Find | View All
First 2 of 4 Last

Subrecipient Annual Report Received

Annual Report Extension Granted

Audit Required? Yes

Rev.  02/12/2016

Ext. date:

Comments 2

Delinquent

Fiscal Year: 2015

Comments 1

Primary Pass-Through: 03440 Children and Families
Dates

Comments on Findings

Audit received by IAG mm- no findings

Audit Received 04/29/2016

Audit Reviewed 05/09/2016

Audit Accepted 05/09/2016

Mgt. Decision Letter Issued

Audit Contains Findings/Issues

Corrective Action Plan Requested

Corrective Action Plan Received

Expenditures Section
Total Amount
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	<a href="#" style="background-color: #f4a460; padding: 2px 5px;">View</a>

[Save](#)
[Return to Search](#)
[Notify](#)

[Award](#) | [Review](#)