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INTRODUCTION

This document is a guide to the Grants application in the Texas CASA on-line data manager (ODM) for Texas CASA grant managers (GMs), the grants management director (GMD), and local CASA programs (LCPs). During the grant application, contract, and reimbursement processes, tasks flow “back-and-forth” between GMs and LCPs. Each section is labelled either "GM" or "LCP" to reflect these interactions.¹

This guide does not include Administrator or design notes. Information pertinent to the ODM Administrator is included in the “Texas CASA Salesforce Admin Documentation” document.

Section 1 on the ODM structure is optional. Instructions begin in Section 2 with the ODM login.

1. THE ON-LINE DATA MANAGER (ODM) STRUCTURE

1.1. Objects and Records

The ODM application is built on the force.com platform. The data are stored in Objects. Objects contain the functionality of a relational database table, with additional enhancements that make them more powerful and versatile. Data are stored in Records of the object, which correspond to rows in a database table.

Objects can also have validation rules, custom page layouts, workflows, approval processes, triggers and other custom coded features.

The following objects are in the ODM: Account, Contact, County, Grant, Budget, Budget Line Item, RFR, Direct Grant, DR Line Item, Direct Reimbursement, Performance Measures, Job Description, Cash Match Source, Annual Audit, and Cooperative Working Agreement.

1.2. Fields

Data are entered and stored in Fields in each Object. Each Object comprises a number of Fields, which correspond to columns in a database table.

Required Fields

Required Fields are marked with a red line on the left-hand edge of the Field data entry box. A record cannot be saved if a required Field is blank.

Field Help

Most data fields provide Field Help. There is a small, yellow bubble immediately to the left of any data field for which Help is available. Hovering over the bubble causes the Help to appear.

Field Tracking

In some Fields, changes in values are tracked. Changes in field values—with time stamps—are listed in the History section at the bottom of an Object page. Grants Management tracks changes in Status fields.

¹ “Admin” refers to the Texas CASA administrator of the on-line data manager and its database.
1.3. Record Types

An Object can have more than one Record Type. Each Record Type displays a specific set of fields. Fields that are not needed are hidden.

For example, the Grant Object has three record types:

1. State Crime Victims Compensation (CVC) grants
2. Federal Victims of Crime Act (VOCA) grants, and
3. State License Plate (LP) grant.

Similarly, the Budget Object has several record types:

1. CVC budgets
   a. Active budgets
   b. Budget revisions
   c. Inactive budgets
2. VOCA budgets
   a. Active budgets
   b. Budget revisions
   c. Inactive budgets
3. LP budgets
4. Operating budgets

Budgets created for Grants with a CVC Record Type are always Budgets with one of the CVC budget Records Types.

The record type is displayed in the System Information section of an Object record. Do not change a Record Type. Contact TCIMS@texascasa.org to correct an incorrect Record Type.
1.4. Relationships and Lookup Fields

Objects can be related to one another. For example, a Contact is related to an Account. When a Contact record is created, it must be related to an Account. The Account Name field on a Contact record is a Lookup Field. The field establishes the relationship to the related object.

A Lookup Field always has a magnifying glass next to it in Edit Mode. Clicking the magnifying glass brings up the correct, related record.

**TIP:** To find a record in a Lookup Search box, enter at least 2 characters. Use * as a wildcard character.

The Lookup Field appears as a link on the related record.
One of the records in a relationship is the **Parent Object** and one is the **Child Object**. One parent record can have multiple child records. For example, an **Account** record can have multiple Contact records and multiple Job Description records.

A **Budget** has multiple **Budget Line Items**. A **Direct Grant** has multiple **Direct Reimbursements**.

Often objects have more than one lookup field. An RFR is related to both a Grant and a Budget so that RFRs are viewable from both a Grant record and the active Budget record.
The hierarchy of records can extend more than one level deep, as is the case in the Grants Management ODM.

2. **ACCESS TO THE ODM**

2.1. **GM: Log in to the ODM**

1. Go to the URL appropriate for Production or for the Sandbox:
   - Sandbox: https://test.salesforce.com
   - Production: https://login.salesforce.com
2. Select Grants from the list of applications in the dropdown list below the Username in the upper, right-hand corner of the screen.

*Expected Results:* The Home Page appears.

*TIP:* To view the ODM from the perspective of an LCP, navigate to a program user’s Contact record, click the Manage External User button/dropdown and select “Log in to Community as User.”

2.2. **LCP: Log in to the Community Portal**

Each LCP has access to the Texas CASA ODM as a member of the ODM Community. Each Community member has a Username and Password.

1. The LCP receives an email from the ODM with a Username and a link. Click on the link and set a Password.
2. Open a web browser. The ODM works with Google Chrome, Microsoft Internet Explorer, or Mozilla Firefox.


*Expected Results:* The Community Home Page appears.

### 2.3. LCP: Navigate the Community Portal

#### The Home Page

1. The ODM Home Page includes a left sidebar with helpful updates and reminders, links, and contact information.

2. Use the small arrow to collapse or expand the sidebar.

---

**Tabs**

Across the top of the page are Tabs, including the Home Page and Reports Page. The other Tabs provide access to the Home Pages of Objects:

- Accounts
- Contacts
- Direct Grants

Other objects, such as Grants or Contacts, are accessed through the Account Object. Click on a Tab to go to the Home Page of an Object.

**List views**

By default, a list of Recently Viewed records of that object type are displayed in the lower section of the screen.

To view a list of records other than Recently Viewed, select a view from the View Menu in the upper section of the screen and click Go!
Click on a column header to sort the records in ascending order. Click again to change the order to descending.

After sorting on a column header, use the letter links in the upper, right-hand of the list screen to show only those items that begin with the chosen letter. Click All to see all records again.

**Object Detail Page and Object Edit Page**

When initially opened, an **Object** record is displayed as a **Detail** page. The data can be viewed, but is not editable.

Editing can occur only when the **Object** is in **Edit** mode. To enter **Edit** mode, click the **Edit** button at the top of the page of an **Object** record in **Detail** mode.

**Related Lists**

Scroll down while on a **Detail** page. Related records appear in the **Related Lists** at the bottom of the **Detail** page.
Hover Links

Hover Links appear at the top of a record detail page, and give you a shortcut to the Related Lists at the bottom of the page.

Hovering over a hover link will display the first few related records for the object associated with the hover link. Records can be created or edited in the hover link box.

Search

At any time, the Search feature—an oval at the top of the page next to the Texas CASA logo—can be used to search for an Object by Name.

3. Routine Local Program Updates

3.1. LCP: Update Address

1. Make any necessary changes to the Address, Phone, and Fax fields.
2. The Account Name in the ODM must never be changed by the LCP. Please contact TCIMS@texascasa.org to request a change in Account Name.
3. Contact TCIMS@texascasa.org to request corrections in any fields that cannot be edited.

Expected Results: The Account record is up to date.

3.2. LCP: Update Local Program Contacts

1. Go to the Accounts tab.
2. Scroll down to the Contacts Related List.

Note: Please ignore the "Program" contact. It is needed for the program login.
3. To edit an existing Contact record, click the Edit link to the left of the Contact Name.
4. Update the fields as needed.
5. To create a new Contact record, click the New Contact button.
6. On the next page select the contact record type from the menu; either "Board" or "Staff."
7. Enter the requested information. Board members must have home or work addresses other than the program address.
8. Check the box for Active Contact. To remove a Contact, uncheck the box for Active Contact.
9. Never try to change the Account Name.
10. Click Save.
11. To see a list of active board members, go to the Contacts tab.
12. Locate the View: Menu.
13. Select the Program Active Board Members view and click Go!
14. To see staff members, select the Program Active Staff Members view and click Go!

Expected Results: Each grant official has a Contact record with a correct email address.

3.3. LCP: Update Program Leadership

1. Go to the Accounts tab.
2. Choose the All CASA Programs view then click Go! to view the program Account record. (Only one record should appear.)
3. Click the Account Name link to open the Account Detail Page.
4. Click the Edit button.
5. Go to the Leadership section.
6. In Edit View, use the Lookup magnifying glass to select the appropriate Contact for each applicable field in the Leadership section.
7. Click Save.

3.4. LCP: Update Local Program Authorized Signers

1. Go to the Accounts tab.
2. Choose the All CASA Programs view then click Go! to view the program Account record. (Only one record should appear.)
3. Click the Account Name link to open the Account Detail Page.
4. Click the Edit button.
5. In Edit View, use the Lookup magnifying glass to select the appropriate Contact for each Signer field in the Authorized Signers section.
6. Click Save.

TIP: The Lookup Pop-up window can be resized for easier reading.
7. It is imperative that every Signer’s email address is correct on the Contact record.

**TIP:** Contacts designated as Signers are flagged with a special icon on the Contact record and in some lists.

**Note:** A designee or alternate may be listed as a Signer.

**Expected Results:** Three Signers appear on the Account record. The Email addresses on their Contact records are correct.

### 3.5. LCP: Update Program Contacts for Functional Areas

1. Go to the Accounts tab.
2. Choose the All CASA Programs view then click Go! to view the program Account record. (Only one record should appear.)
3. Click the Account Name link to open the Account Detail Page.
4. Click the Edit button.
5. Go to the section labelled Program Contacts for Functional Areas.
6. In Edit View, use the Lookup magnifying glass to select the appropriate Contact for each applicable field in the Functional Areas section.
7. Click Save.

### 3.6. LCP: Enter or Update Job Descriptions

1. Open the Account record.
2. Navigate to the Job Descriptions Related List using the hover links or by scrolling down to the list.
3. To create a new Job Description record, click the New Job Description.
a) LCP is automatically populated with the program Name. Do not change this field.

b) Enter Job Title and Job Description.

c) Click Save. Or, click Save & New to open a new, blank record.

4. To edit an existing Job Description record, click the Edit link next to the record in the Related List.

5. To prepare to budget volunteer time as an in-kind match in a VOCA grant, create a Job Description with “Volunteers” (only) in the Job Title.

<table>
<thead>
<tr>
<th>Job Description Detail</th>
<th>Edit</th>
<th>Delete</th>
<th>Clone</th>
</tr>
</thead>
<tbody>
<tr>
<td>LCP</td>
<td>CASA of Williamson County, Texas</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Description</td>
<td>Advocate Supervisor 1 will supervise the volunteers.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TIP:** Use a number or letter to distinguish otherwise identical Job Titles, such as Supervisor 1, Supervisor 2, etc.

**TIP:** Job Description is the object name. The object contains both Job Title and Job Description fields. The Job Title is the name of the record.

---

### 4. CREATE AN ANNUAL GRANT SETUP

#### 4.1. GM: Create an Annual Grant Setup

1. Go to Annual Grant Setup tab

2. Click New Annual Grant Setup. Select the Record Type for a CVC, VOCA, or LP grant.

3. Use the standard naming convention for the Annual Grant Setup Name. That is, <Grant short code> <FY20nn> Setup. For example, CVC-FY2018-Setup, VOCA-FY2018-Setup, and LP-FY2018-Setup.

4. Fill in all required fields

5. Click Save.

6. To Clone an existing setup record, choose the All view then click Go!

   From the View, click on the Name of a record of the same Record Type to be cloned. In Detail View, click the Clone.

7. Enter changes and click Save.

**Expected Results:** A new Annual Grant Setup record is created.

---

### 5. CREATE A GRANT

#### 5.1. GM: Calculate CVC or VOCA Awards

Enabler4Excel instructions go here.
5.2. GM: Create CVC or VOCA Grants

1. Insert the CVC or VOCA spreadsheet with LCP awards using Enabler4Excel.

*Expected Results:*
- CVC and VOCA Grants for eligible LCPs are created with Award Amounts. The grant *Status* field value is *Created*.
- The required Budget records are created tied to each grant.
- The grant budget is marked as *Active*.

5.3. GM: Notify LCPs of CVC and VOCA Grant Awards

1. Open the *Annual Grant Setup*.
2. Review all grant award amounts.
3. Click *Edit* on the Annual Grant Setup record and check the *Notify LCPs of Award* checkbox.
4. Click *Save*.

*Expected Results:*
Notifications of grant awards are sent to the ED-level Signers.

5.4. GM: Create License Plate (LP) Grants and Notify LCPs

1. Enter license plate counts in the *County* records.
2. Make *County* records for the current fiscal year *Active*.
3. Run the *LCP # Counties Served and # of Plates* report.
4. Verify *Award Amount per LP*.
5. Open the *Annual Grant Setup*.
6. Click *Edit* on the Annual Grant Setup record and check the *Create LCP LP Grants* checkbox.
7. Click *Save*.

*Expected Results:*
A new *LP Grant* for each eligible LCP with an *Award Amount*. A Budget record with a single *Budget Line Item* is created for each new LP Grant. The ED-level Signer for each LCP receiving an award is notified by email.

6. **COMPLETE A CVC OR VOCA GRANT APPLICATION**

6.1. LCP: Complete a CVC Grant Application

**Review CVC grant application instructions**

The LCP receives an email notification that CVC grant applications are on-line.

1. Login to the ODM Community portal.
2. Go to the *Account* tab.
3. Select any view, and select your *Account Name* to open your Account record.
4. Scroll down to the *Related List* of Grants.
5. Click the **Grant Number** link for the new CVC Grant to open the **CVC Grant Detail** page.

6. Check the program grant officials by clicking on the **Button** at the top to **View Program Contacts**.

7. Scroll down to the **Budget Related List** to locate the Grant Budget shell.

**Answer prompts on the CVC grant application**

1. From the **CVC Grant Detail** page, click **Edit**.

2. In the Instructions Section, click on the link to read the guidelines on eligible expenses for Title IV-E PSVT.

3. Answer the questions about PSVT participation and certification of board members and staff.

4. Do **not** yet check the **Application Complete** checkbox.

5. Click **Save**.

**Create a Budget Line Item for the CVC grant budget**

1. Scroll down to the **Budgets Related List** on the CVC Grant page.

2. Click on the **Budget Name** of the budget flagged as the **Active Budget** to open the **Budget Detail** page.

3. Click the **New CVC Budget Line Item** to create a new line item.

4. Do **NOT** change the **Budget** field.

5. Select the **Category** of the line item.

6. Provide a **Line Item Description**.

7. **Personnel** category line items require a **Job Title** lookup from program **Job Descriptions**. The **Line Item Description** is then filled automatically.

8. A **Fringe** category line item is created automatically for each **Personnel** category line item.

9. To enter **Grant Budget Amounts** in Fringe line items, go to the **Budget Detail** page and click **Edit** link to the left of the **Fringe** line items.

10. Use the **Personnel/Fringe Check** button on the Budget Detail page to view a summary report. Identify duplicate or missing **Fringe** line items.

11. To budget mileage, use **Category 4. Travel & Training**. The **Line Item Description** must contain the word “Mileage” or “mileage”. Do not include other travel and training expenses in a line item with mileage.

12. Use the optional **PSVT-Growth Field** to identify pre-service volunteer training (PSVT) items eligible for additional Title IV funding. **Note**: Expenses partly eligible must be divided into separate line items.

13. **Annual Gross Amount** is required for all line items except **Travel & Training**.

14. Provide the **Grant Budget Amount** for each line item.

---

**TIP:** A **Fringe** line item is created automatically when a **Personnel line item** is created. It is never necessary to create a **Fringe line item**.
15. Click the **Grant Budget Summary** button on the **Budget Detail** page to view a report of the budget items summarized by **Category**. Use the **Show Details** button to see individual line items. Use the **Hide Details** button to see totals by **Category**.

**Expected Results:** A **Budget Line Item** is completed for the CVC Grant **Budget**. The **Grant Budget Grand Total** on the **Budget Detail** reflects the total of all grant budget line items.

**Create a Budget Line Item for the CVC grant budget with the Clone button**

1. After saving the first line item, you can use the **Clone** button on the **Budget Line Item Detail** page to create a line item.

2. Scroll to the **BLI** list.

3. Click on a **BLI** link.

4. Update the **Category**, **Line Item Description** or **Job Title**, **Annual Gross Amount**, and **Grant Budget Amount** as needed.

5. Follow the rules in steps 4 through 15 in the section immediately above.

6. Click **Save**.

**Expected Results:** A **Budget Line Item** is created for the CVC Grant **Budget**. The **Grant Budget Grand Total** shows the total of all grant budget line items.

**Validate a CVC grant application**

The total of all **Grant Budget Amounts** must equal the CVC Grant **Award Amount**. A green checkmark next to the **Valid Grant Budget Total?** on the CVC **Budget Detail** page indicates the total is valid. A red X indicates the total of **Grant Budget Amounts** is not equal to the grant **Award Amount**.

**Submit a CVC grant application**

1. Click on the “Grant” link on the **Budget Detail** page to open the CVC **Grant Detail** page.

2. Ensure all boxes in the **Grant Application Status** section are checked except for Application Complete.

3. Click **Edit**.

4. Check **Application Complete** and click **Save**.

5. If there are no errors, click **Submit for Approval**.

**Expected Results:** The CVC grant application is submitted to the Grant Manager for approval. The Approval History section of the **Grant** page shows the current approver and approval status of Pending. The Grant and its budget(s) are locked. The grant **Status Field** is set to **Submitted**.

6.2. **LCP: Complete VOCA Grant Application**

**Review VOCA grant application requirements**

The LCP receives an email notification that VOCA grant applications are on-line.

1. Login to the ODM Community portal.

2. Go to the **Account** tab.

3. Select any view, and select your **Account Name** to open your Account record.
4. Scroll down to the Related List of Grants.
5. Click the Grant Number link for the new VOCA Grant to open the VOCA Grant Detail page.
6. Check the program grant officials by clicking on the Button at the top to View Program Contacts.
7. Scroll down to the Budget Related List to locate the Grant Budget.
8. Review the instructions and certifications shown on the form, including information provided in the form of a linked document.

Create a Budget Line Item for the VOCA grant budget

1. Scroll down to the Budgets Related List on the VOCA Grant page.
2. Click on the Budget Name of the budget flagged as the Active Budget to open the Budget Detail page.
3. Click the New VOCA Budget Line Item to open a new line item.
4. Do NOT change the Budget field.
5. Select the Category of the line item.
6. Provide a Line Item Description.
7. Personnel category line items require a Job Title lookup from program Job Descriptions. The Line Item Description is then filled automatically.
8. A Fringe category line item is created automatically for each Personnel category line item.
9. To enter Grant Budget Amounts in Fringe line items, go to the Budget Detail page and click Edit link to the left of the Fringe line items.
10. To prepare to budget volunteer time as an in-kind match in a VOCA grant, create a Job Description with “Volunteers” (only) in the Job Title.
11. Use the Personnel/Fringe Check button on the Budget Detail page to view a summary report. Identify duplicate or missing Fringe line items.
12. To budget mileage, use Category 4. Travel & Training. The Line Item Description must contain the word “Mileage” or “mileage”. Do not include other travel and training expenses in a line item with mileage.
13. Use the optional PSVT-Growth Field to identify pre-service volunteer training (PSVT) items eligible for additional Title IV funding. Note: Expenses partly eligible must be divided into separate line items.
14. Annual Gross Amount is required for all line items except Travel & Training.
15. Provide the Grant Budget Amount for each line item.
16. Fill in the Cash Match amount if applicable.
17. Fill in the In-Kind Match amount if applicable.

TIP: A Fringe line item is created automatically when a Personnel line item is created. It is never necessary to create a Fringe line item.
18. Click the Grant Budget Summary button on the Budget Detail page to view a report of the budget items summarized by Category. Use the Show Details button to see individual line items. Use the Hide Details button to see totals by Category.

**Expected Results:** A Budget Line Item is created for the VOCA Grant Budget. The Grant Budget Grand Total on the Budget Detail page shows the total of all grant Budget Line Items.

**Create a Budget Line Item for the VOCA grant budget with the Clone button**

1. After saving the first line item, you can use the Clone button on the Budget Line Item Detail page to create a line item.
2. Scroll to the BLI list.
3. Click on a BLI link.
4. Update the Category, Line Item Description or Job Title, Annual Gross Amount, and Grant Budget Amount as needed.
5. Follow the rules in steps 4 through 18 in the section immediately above.
6. Click Save.

**Expected Results:** A Budget Line Item is created for the VOCA Grant Budget. The Grant Budget Grand Total on the Budget detail reflects the total of all grant budget line items.

**Create Cash Match Sources from the Budget**

1. Go to the VOCA Budget Detail page.
2. Scroll down to the Cash Match Sources related list and click on the New Cash Match Source button.
3. Add a record for each cash match source associated with the VOCA grant. Use the New button or the Clone button to add records. Validate the Budget
4. On the VOCA Grant page, scroll down to the Budget Related List.
5. Review the validations fields for the Active VOCA Grant Budget. A green checkmark indicates the total is valid. A red X indicates the total budget is not valid.

**Expected Results:**

- The Valid Grant Budget Total? shows a green checkmark.
- The Valid Cash Match Source Total? shows a green checkmark.
- The Valid Match Percentage? shows a green checkmark.
- The Valid Budget and Match Total? shows a green checkmark.

**Submit the VOCA grant application**

1. To navigate back to the parent Grant record, click on the “Grant” link on the Budget Detail page.
2. From the Grant Detail page, you are now ready to complete and submit your application.
3. Review the Grant Application Status section of the grant record. The VOCA Budget Totals Valid checkbox must show checked before you can mark your application complete. If this box is not
checked, open the grant’s budget record and review the reasons (as indicated by red x’s in the Grand Totals section). Make any necessary changes to the budget before proceeding.

4. Follow instructions under the Cooperative Working Agreement Purpose and Participants section to add Cooperative Working Agreement records using the related list on the grant (if applicable).

5. Click the Edit button at the top of the Grant Detail page and fill in all information as required. You can save the application without completing it, and come back to it as you have time. Only the fields marked with a red line will be required even for the initial save. The other items can be completed later.

6. Once you are ready to submit the application, click Edit, check Application Complete and click Save. The ODM will alert you to any problems, which you should remedy.

7. Click Submit for Approval.

Expected Results: The VOCA grant application is submitted to the Grant Manager for approval, and the Approval History section shows the current approver and approval status of “Pending”. The Grant and its budget(s) are locked so that the LCP cannot make edits. The grant’s Status field is set to “Submitted”.

7. **CREATE A CVC GROWTH APPLICATION**

7.1. **LCP: Create a CVC Growth Application**

The LCP receives an email notification that CVC grant applications are on-line.

1. Use the link in the email to review the CVC Growth Funds RFP Instructions on the use of CVC Growth funds.

2. Login to the ODM Community portal.

3. Go to the Account tab.

4. Select any view, and select your Account Name to open your Account record.

5. Scroll down to the Related List of Grants.

6. Click the Grant Number link for the current CVC Grant to open the CVC Grant Detail page.

7. Click the Create CVC Growth App button to create and display the new grant application.

8. Read all instructions and upload the required documentation under Notes & Attachments. CVC Growth Data are provided in the Projection section.

9. Click Edit to open the CVC Growth Grant Edit page.

10. Fill in the required fields and Save.

11. Click on the Budget to open the Budget page.

12. Add Budget Line Items.

13. The total budget amount must equal the additional funding requested.

14. Click Edit to open the CVC Growth Grant Edit page.

15. Check the Application Complete box.
16. Click **Save**.

17. Click **Submit for Approval**.

### 8. **CERTIFY A GRANT APPLICATION**

#### 8.1. GM: Generate Certification Documents for Grant Application

1. View a grant with **Status** as **Submitted**.
2. Open the **Grant Detail** page.
3. Click **Generate Documents** to show the Dynamic Document Package (DDP) name and Signer roles.
4. Include Attachments as part of the DDP for a CVC Growth application.
5. Accept the default delivery method **Send with Docusign**.
6. Click **Run**.

**Expected Results:** The grant application certification document is sent to the signers designated by the LCP. The **Status** field is set to **Pending LCP Certification**. A **DocuSign Status** record with related recipients is added to the grant. (It takes a minute).

#### 8.2. LCP: Sign Certification Documents for Grant Application

Grant officials designated by the LCP receive emails for signature from Docusign in succession.

1. Follow Docusign instructions to review and sign the grant application to signify approval of the Grant application and proposed budget.

**Expected Results:** After all signatures are complete, the Docusign Status record reflects an Envelope Status of **Completed**, and the grant’s **Status** field is set to **Certified**. All signers and the sender receive an email with signed pdf attached from Docusign. The signed PDF is automatically attached to the grant record under Notes & Attachments.

### 9. **APPROVE A GRANT APPLICATION**

#### 9.1. GM: Approve or Reject a Grant Application

**Note:** Do not take approval or rejection action on a grant that is **Submitted**, but not yet **Certified**.

1. View a grant application with **Status** of **Certified**.
2. Click on the Grant Number to open the **Grant Detail** page.
3. Review the application and budget(s).
4. If minor revisions are required, the GM corrects the application, notes the revisions, and rejects the application to notify the LCP of the revisions.
5. If major changes are required, the GM rejects the application.
6. If no corrections are required, the GM approves the application.

**Note:** Grant and Budget records are locked during the approval process. The GM or System Administrator can click **Edit** to make changes.

7. Scroll down to the **Approval History** section on the Grant detail page.

8. Click the **Approve/Reject** link to open a page and add comments to advise the LCP of minor revisions made or major revisions required.

**Expected Results:** The grant application **Approval History** reflects the approval status. If approved, the grant’s **Status** field is set to **GM Approved**. If rejected, the **Status** is set to **Returned**. The ED-level Signer is notified if the application is rejected.

### 9.2. LCP: Review, Correct, and Resubmit a Grant Application

1. Open to **Grant Detail** page.
2. Scroll down to the **Approval History** section or use the Approval History hover.
3. View the Comments associated with the rejection.
4. Revise the application and budget.
5. Click **Submit for Approval**.

**Expected Results:** The updated grant application **Approval History** Status is **Pending**. The grant and budget are locked and the **Status** is **Revised**.

### 10. Sign a Grant Contract

#### 10.1. GM: Generate Contract Document for Grant

1. View a grant with **Status** as **GM Approved**.
2. Open the **Grant Detail** page.
3. Click **Generate Documents** to show the Dynamic Document Package (DDP) name and Signer roles.
4. Accept the default delivery method **Send with DocuSign**.
5. Click **Run**.

**Expected Results:** The grant application contract document is sent to the designated grant officials. The **Status** field is set to **Pending Contract Signature** or **Pending Amendment Signature**. A new **DocuSign Status** record (and related recipients) is added to the grant.

#### 10.2. LCP: Sign Contract

1. Grant officials designated by the LCP receive email for signature from DocuSign in succession.
2. Follow DocuSign instructions to review and sign the contract document.
**Expected Results:** After all signatures are complete, the Docusign Status record reflects an Envelope Status of Completed, and the grant’s Status field is set to Active. CVC growth funds are added to the original CVC Award Amount. CVC Line Items are incorporated in the CVC active budget.

### 11. Budget Revision Request

#### 11.1. LCP: Create a Budget Revision

**Note:** A Budget Revision cannot be created for a Grant with an open RFR or an open Budget Revision request. Only one Formal Budget Revision request can be submitted for a grant in a quarter.

1. Navigate to the active Budget record.

2. Click the Budget Name link to open the Budget Detail page.

3. Click the Request Budget Revision button on the top of the Budget Detail page to open a new Budget Revision.

**Expected Result:** A Budget Revision name fills automatically as `<original Budget name>` + ‘Budget Revision’ + `<Date of request>`.

4. Click the Revise Budget Line Items button to access the Budget Revision spreadsheet. A Budget Revision spreadsheet has four components: (1) Buttons, (2) Validation Statements, (3) Grant and Budget Revision information, and (4) Budget Line Items spreadsheet.

5. The Budget Line Items display in the spreadsheet (4) as they appear in the approved Active Budget and cannot be edited.

6. The Type of Revision Request in section (3) is a Conventional Revision Request by default.
11.2. LCP: Enter Change Request(s)

1. Enter change requests in the Change Request Amount column (CVC or VOCA Grants).
2. Enter change requests in the Reported Cash Match Amount column and Reported In-Kind Match Amount column if applicable (VOCA Grants only).
3. At any time, click the Grant Budget Summary button to view of pop-up report of the revised Budget Line Items grouped by category.
4. Click Save button.
5. To exit the Budget Revision Line Items page, click the Return to Budget button. To return later to continue work, click the Revise Budget Line Items button on the Budget Revision page.

Expected Result: Error-free change requests are saved to the Budget Revision. An error message identifies Budget Line Items errors. The Budget Line Items with errors are not saved and the data are cleared.

If the change requests are greater than 10 percent of the Award Amount, or if there is a change in Equipment or Contractual categories, the Type of Budget Revision automatically changes from Conventional Revision Request to Formal Revision Request.

11.3. LCP: Add Budget Line Item(s)

1. To add a new Budget Line Item to the Budget, click the Add CVC/VOCA Budget Line Item button.
2. At any time, click the Grant Budget Summary button to view of pop-up report of the revised Budget Line Items grouped by category.
3. Click Save button.
4. To exit the Budget Revision Line Items page, click the Return to Budget button. To return later to continue work, click the Revise Budget Line Items button on the Budget Revision page.

Expected Result: Error-free change requests are saved to the Budget Revision. An error message identifies Budget Line Items errors. The Budget Line Items with errors are not saved and the data are cleared.

The Type of Budget Revision automatically changes from Conventional Revision Request to Formal Revision Request.

11.4. Validate and Submit a Budget Revision

The condition statements in section (2) must be satisfied before the Budget Revision can be submitted. A green checkmark✓ indicates the condition is satisfied. A red X indicates the condition is not satisfied.

1. Review all condition statements.
2. If red X appears, revise the data.
3. When all condition statements show a green checkmark✓, click Save.
4. Click the Return to Budget button to go to the Budget Revision page.
5. On the Budget detail page, click Edit.
6. Enter the Revision Justification and Month of Budget Revision.
7. Check the Revision Request Complete checkbox.
8. Click Save.
9. Click Submit for Approval.

**Expected Results:** The Budget Revision is sent for GM approval. The Approval History section shows the current approver and an approval status of Pending. The Status field is set to Submitted.

### 11.5. GM: Generate Certification Documents for Budget Revision

1. View a Budget Revision with Status as Submitted.
2. Open the Budget Detail page.
3. Click Generate Documents to show the Dynamic Document Package (DDP) name and Signer roles.
4. Accept the default delivery method Send with DocuSign.
5. Click Run.

**Expected Results:** The Budget Revision certification document is sent to the designated grant officials. The Status field is set to Pending LCP Certification or Pending Amendment Signature. A new DocuSign Status record (and related recipients) is added to the grant.

### 11.6. LCP: Sign Certification Documents for Budget Revision

Grant officials designated by the LCP receive email for signature from DocuSign in succession.

1. Signers follow DocuSign instructions in the email to review and sign the document to signify approval of the Budget Revision.

**Expected Results:** After all signatures are complete, the Docsign Status record reflects an Envelope Status of Completed, and the Budget Revision Status field is set to Certified. All signers and the sender receive an email (with signed pdf attached) from DocuSign. The signed PDF is automatically attached to the grant record under Notes & Attachments.

### 11.7. GM: Approve or Reject a Budget Revision

**Note:** Do not take approval or rejection action on a grant that is Submitted, but not yet Certified.

1. View a Budget Revision with status of Certified.
2. Review the Budget Revision.
3. If minor revisions are required, the GM corrects the Budget Revision, notes the corrections, and rejects the application to notify the LCP of the corrections.
4. If major corrections are required, the GM rejects the budget revision.
5. If no corrections are required, the GM approves the budget revision.
Note: Budget Revisions are locked during the approval process. The GM or System Administrator can click Edit to make changes.

6. Scroll down to the Approval History section on the Budget Revision Detail page.
7. Click the Approval/Reject link to open a page and add comments to advise the LCP of minor revisions made or major revisions required.

11.8. GMD: Approve or Reject a Formal Budget Revision

1. View a Budget Revision with status of GM Approved.
2. Review the Budget Revision.
3. Scroll down to the Approval History section on the Budget Revision Detail page.
4. Click the Approval/Reject link to open a page and add comments to advise the LCP of minor revisions made or major revisions required.

Expected Results: The Approval History of the Budget Revision reflects the approval audit trail. The LCP is notified of approval or rejection. If rejected, the Status is set to Returned. If approved, the Status field is set to Approvals Complete. The original Budget is renamed and becomes Inactive. All line items are copied into a revised, Active Budget.

Two fields are populated in the System Information section: Original Budget Record used for revision and New Budget created using this Revision.

11.9. LCP: Correct and Resubmit Budget Revision

1. Click on the Grant Number associated with the rejected Budget Revision.
2. Scroll to Budgets in the Related Lists.
3. Click on the Budget Revision with a status of Returned.
4. Scroll down to the Approval History section on the Budget Detail page.
5. View the Comments.
6. Make any requested changes to the Budget Revision and click Submit for Approval.

Expected Results: The Approval History of the Budget Revision shows Pending. The Status is Revised.

12. REQUEST FOR REIMBURSEMENT (RFR)

12.1. LCP: Create a CVC or VOCA Request for Reimbursement

Note: An RFR cannot be created for a Grant with an open RFR or an open Budget Revision request. Only one RFR can be submitted for expenses in a given month.
1. Navigate to the active Budget record.

<table>
<thead>
<tr>
<th>Action</th>
<th>Budget Name</th>
<th>Active Budget</th>
<th>Record Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>CVC-2016-69 Budget</td>
<td></td>
<td>CVC Budget</td>
</tr>
<tr>
<td>Del</td>
<td>CVC-2016-69 Operating Budget</td>
<td></td>
<td>CVC Operating Budget</td>
</tr>
<tr>
<td>Edit</td>
<td>CVC-2016-69 Budget REVISED 2016-10-27</td>
<td></td>
<td>CVC Budget Revision</td>
</tr>
<tr>
<td>Del</td>
<td>CVC-2016-69 Budget INACTIVE 2016-10-27</td>
<td></td>
<td>CVC Budget Inactive</td>
</tr>
</tbody>
</table>

1. Click the Budget Name link to open the Budget Detail page.
2. Click the Reimbursement Request button on the top of the page.

**Expected Result:** A Request for Reimbursement (RFR) is created.

3. The Enter Reimbursement Amounts button opens a spreadsheet with three sections: (1) buttons, (2) Grant Name, and (3) a spreadsheet of the Budget Line Items in the Active Budget.
4. The RFR Line Items display in the spreadsheet (3) as the Budget Line Items appear in the approved Active Budget and cannot be edited.

### 12.2. LCP: Enter Reimbursement Request Amounts

1. For CVC and VOCA grants, enter amounts for Actual Gross Monthly Salary and Requested Amount Charged to Grant.
2. If the Category is Travel & Training and the Line Item Description has “mileage,” enter data in the Add Rates column.
3. For VOCA grants, if the Category is Personnel and the Line Item Description has Volunteers, enter data in the Add Rates column.
4. For VOCA grants, enter amounts for Reported Cash Match Amount and Reported In-Kind Match Amount, if applicable.
5. Click Save button.
6. To exit the **Enter Reimbursement Amounts** page and return to the **Reimbursement Detail** view, click the **Go to RFR** button. To return later to continue work, click the **Enter Reimbursement Amounts** button on the RFR page.

**Expected Result:** Error-free change requests are saved to the RFR. An error message identifies RFR Line Items errors. The lines with errors are not saved and the data are cleared.

### 12.3. LCP: Attach Documentation

1. Go to **Reimbursement Detail** view.
2. Click **RFR Summary** to view a pop-up report of requested reimbursements amounts grouped by Category.
3. Click **Cash Match Summary** to view a pop-up report of cash match amounts grouped by Category.
4. Click **In-Kind Summary** to view a pop-up report of in-kind match amounts grouped by Category.
5. Attach required documentation in the **Notes & Attachments** section.
6. Click **Edit** on the **RFR Detail** page.
7. Check the **Supporting Documentation Attached?** Checkbox.
8. Enter the **Month of Expense**.
9. Check the **RFR Complete?** Checkbox.
10. Click **Save**.
11. Click **Submit for Approval**.

**Expected Results:** The RFR is sent for GM and GMD approval. The Approval History section shows the current approver and Approval Status of Pending. The Status is set to Submitted.

### 12.4. LCP: Create a Request for Reimbursement for a License Plate (LP) Grant

#### Create an LP RFR

**Note:** Only one LP RFR can be submitted in a fiscal year.

1. Navigate to the **Active Budget**. Do not attempt to change the **Active Budget**. The **Active Budget** has been generated automatically and has one **Budget Line Item** that reads “General: License Plate Budget Item.”
2. Click the **Request for LP Reimbursement** button and open the LP RFR.
3. Fill in the **Month of Expense**.
4. Click **Save**.

#### Add RFR Line Item(s)

1. Scroll down to the **Related List** of RFR Line Items.
2. Click the **New LP RFR Line Item** button.
3. Fill in the required fields.
Note: The mileage and reimbursement rate can be used to calculate the Requested Amount Charged to Grant. The Category must be 4. Travel & Training. The Line Item Description must contain the word “Mileage” or “mileage.”

4. Click Save.

5. Add additional line items with the New LP RFR Line Items button on the RFR page or with the Clone button on an RFR Line Item page.

Upload supporting documentation

1. On the RFR page, scroll down to the Notes & Attachments section and upload any required supporting documentation.

2. After uploading documentation, click Edit on the RFR record and check the “Supporting Documentation Attached?” and “RFR Complete?” checkboxes.

3. Click Submit for Approval.

Expected Results: The RFR is sent for GM and GMD approval. The Approval History section shows the current approver and approval status of Pending. The Status is Submitted.

12.5. GM: Generate Certification Documents for RFR

1. View an RFR with Status as Submitted or Revised.

2. Open the RFR Detail page.

3. Click Generate Documents to show the Dynamic Document Package (DDP) name and Signer roles.

4. Accept the default delivery method Send with DocuSign.

5. Click Run.

Expected Results: The RFR certification document is sent to the signers designated by the LCP. The Status is set to Pending LCP Certification. A DocuSign Status record with related recipients is added to the RFR.

12.6. LCP: Sign Certification Documents for RFR

Grant officials designated by the LCP receive emails for signature from DocuSign in succession.

1. Follow DocuSign instructions to review and sign the RFR to signify approval.

Expected Results: After all signatures are complete, the DocuSign Status record reflects an Envelope Status of Completed, and the RFR Status is Certified. All signers and the sender receive an email with signed pdf attached from DocuSign. The signed PDF is automatically attached to the RFR record under Notes & Attachments.

12.7. GM: Approve or Reject an RFR

Note: Do not take approval or rejection action on an RFR that is Submitted, but not yet Certified.

1. View an RFR with status of Certified.
2. Open and review the RFR.

3. If minor revisions are required, the GM corrects the RFR, notes the corrections, and rejects the RFR to notify the LCP of the corrections.

4. If major corrections are required, the GM rejects the RFR.

5. If no corrections are required, the GM approves the RFR.

Note: RFRs are locked during the approval process. The GM or System Administrator can click Edit to make changes.

6. Scroll down to the Approval History section on the RFR Detail page.

7. Click the Approval/Reject link to open a page and add comments to advise the LCP of minor revisions made or major corrections required.

**Expected Results:** If approved, the Status is GM Approved. If rejected, the Status is set to Returned. The Approval History on the RFR reflects the approval audit trail. The LCP is notified of approval or rejection.

### 12.8. GMD: Approve or Reject an RFR

1. View an RFR with status of GM Approved.

2. Review the RFR.

3. Scroll down to the Approval History section on the RFR page.

4. Click the Approval/Reject link to open a page and add comments to advise the LCP of minor revisions made or major revisions required.

**Expected Results:** If approved, the Status field is set to Approvals Complete. If rejected, the Status is set to Returned. The Approval History of the RFR reflects the approval audit trail. The LCP is notified of approval or rejection.

The values of Current Grant Balance on the Budget Line Items is updated.

Updated sum of RFR amounts and the percentage reimbursed are visible on the Active Budget and Grant records.

### 12.9. LCP: Correct and resubmit an RFR

1. Open the Account and scroll to the Related List of Grants.

2. Click on the Grant Number associated with the rejected RFR.

3. Scroll to the Related list of Reimbursements.

4. Click on the RFR with a status of Returned.

5. Scroll down to the Approval History section on the RFR Detail page.

6. View the Comments.

7. Make any requested changes to the RFR and click Submit for Approval.

**Expected Results:** The Approval History of the RFR shows Pending. The Status is Revised.
12.10. GM: Enter RFR payment date

1. Enter Date Paid.

*Expected Result:* The Payment Status is Paid. The ED-level Signer is notified.

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### 13. CREATE A DIRECT GRANT

#### 13.1. GM: Create Direct Grant

1. Go to Direct Grants tab.
2. Choose the View named All and click Go!
3. Click New Direct Grant.
4. Fill in all required fields. Include the fiscal year in the Direct Grant Name field.
5. Click Save.

*Expected Results:* New Direct Grant record created with a Name following the naming convention.

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### 14. REQUEST FOR DIRECT REIMBURSEMENT (DR)

#### 14.1. LCP: Create Direct Reimbursement

1. Go to Direct Grants tab.
2. Choose the View named All and click Go!
3. Click the Direct Grant Name to open Direct Grant Detail page.
4. Review the required supporting documentation under Instructions and Forms.
5. In the Totals section, verify the funds balance.
6. Scroll down to the Direct Reimbursements Related List.
7. Click the New Direct Reimbursement button.
8. Fill in all required fields
9. Click Save.

*Expected Results:* A new Direct Reimbursement is created with a Name following the naming convention DIRECT + <Name> + <Administrative Identification Number>.

#### 14.2. LCP: Add Budget Line Items

1. Scroll down to the DR Line Items Related List
2. Click the New DR Line Item button.
3. Fill in the required fields.

*Tip:* Do NOT use the Save & New button.
4. Click Save.
   Note: The mileage and reimbursement rate are used to calculate the Requested Amount Charged to Grant.

5. Use the New DR Line Item button on the DR Detail page or the Clone button on a DR Line Item to create additional line items.

6. The Line Item Description must contain the word “Mileage” or “mileage” to trigger the calculation of a reimbursable amounts for mileage.

7. In DR Detail view, scroll down to the Notes & Attachments section and upload supporting documentation to the DR.
   Note: There is a link on the DR Detail page that is linked to forms on the Texas CASA website required by Texas CASA for direct reimbursements.

8. Click Edit.


10. Click Save.

11. Click Submit for Approval.

   Expected Results: The Direct Reimbursement is created with DR Line Items and supporting documentation. The DR is sent for approval. The Approval History section shows the current approver and an approval status of Pending. The DR Status is Submitted.

14.3. GM: Generate Certification Documents for DR

1. View a DR with Status as Submitted.

2. Open the DR Detail page.

3. Click Generate Documents to show the Dynamic Document Package (DDP) name and Signer roles.

4. Accept the default delivery method Send with Docusign.

5. Click Run.

   Expected Results: The DR certification document is sent to the signers designated by the LCP. The Status is set to Pending LCP Certification. A DocuSign Status record with related recipients is added to the DR.

TIP: To preview a certification document without sending it, choose the Download delivery method.

14.4. LCP: Sign Certification Documents for DR

Grant officials designated by the LCP receive emails for signature from DocuSign in succession.

1. Follow DocuSign instructions to review and sign the grant application to signify approval of the Grant application and proposed budget.

   Expected Results: After all signatures are complete, the Docusign Status record reflects an Envelope Status of Completed, and the DR Status is Certified. All signers and the sender receive an email with signed pdf attached from DocuSign. The signed PDF is automatically attached to the DR record under Notes & Attachments.
14.5. GM: Approve or Reject a DR

**Note:** Do not take approval or rejection action on a grant that is *Submitted*, but not yet *Certified*.

1. View a DR with status of *Certified*.
2. Open and review the DR.
3. If minor revisions are required, the GM corrects the DR, notes the corrections, and rejects the application to notify the LCP of the corrections.
4. If major corrections are required, the GM rejects the DR.
5. If no corrections are required, the GM approves the DR.

**Note:** DRs are locked during the approval process. The GM or System Administrator can click Edit to make changes.

6. Scroll down to the Approval History section on the DR Detail page.
7. Click the Approval/Reject link to open a page and add comments to advise the LCP of minor revisions made or major corrections required.

**Expected Results:** If approved, the Status is *GM Approved*. If rejected, the Status is set to *Returned*. The Approval History on the DR reflects the approval audit trail. The LCP is notified of approval or rejection.

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14.6. GMD: Approve or Reject a DR

1. View a DR with status of *GM Approved*.
2. Review the DR.
3. Scroll down to the Approval History section on the DR page.
4. Click the Approval/Reject link to open a page and add comments to advise the LCP of minor revisions made or major revisions required.

**Expected Results:** If approved, the Status field is set to Approvals Complete. If rejected, the Status is set to *Returned*. The Approval History of the DR reflects the approval audit trail. The LCP is notified of approval or rejection.

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14.7. LCP: Update and resubmit a DR

1. Click on the DR with a status of *Returned*.
2. Scroll down to the Approval History section on the DR Detail page.
3. View the Comments.
4. Make any requested changes to the DR and click Submit for Approval.

**Expected Results:** The Approval History of the DR shows Pending. The Status is Revised.

---

14.8. GM: Enter RFR payment date

1. Enter Date Paid.
**Expected Result:** The **Payment Status** is **Paid**. The ED-level **Signer** is notified.
15. OPERATING BUDGET

This Section under construction.

Create first Budget Line Item (BLI) for operating budget(s)

1. On the Account Detail page, Scroll down to the Operating Budget Related List.
2. Click on the Operating Budget Name to open the operating budget record.
3. Scroll down to the Related List of Operating Budget Line Items.
4. Use the New Operating Budget Line Item button to create the first line item in the operating budget.
5. Do not change the Budget field.
6. Fill in all remaining fields, including Operating Budget Amount.
7. Click Save. Do not click Save & New.

Expected Results: The first Budget Line Item is created. The BLI Edit View closes and the BLI Detail View appears.

Use Clone button to create additional Budget Line Items (BLIs) for the operating budget(s)

1. Go to the Budget Line Item Detail page and click the Clone button to create a copy of the BLI.
2. Update the Category, Operating Funds Source and/or Operating Budget Amount as needed.
3. Click Save.
4. Repeat Steps 1 through 3 as needed.
5. Click the Grant Budget Summary button on the Budget Detail page to view a report of the budget items summarized by fund source and category.

Use New Operating Line Item button to create additional Budget Line Items (BLIs) for the operating budget(s)

1. Alternatively, go to the Budget Detail page.
2. Use the New Budget Line Item Button to add new budget line items.
3. Repeat Steps 1 and 2 as needed.
4. Click the Grant Budget Summary button on the Budget Detail page to view a report of the budget items summarized by fund source and category.

Note: Umbrella programs prepare an operating budget for the CASA program and for the umbrella organization.

Expected Results: Budget Line Items are complete. The Operating Budget Grand Total on the Budget Detail page reflects the total of all operating budget line items.
16. ANNUAL AUDIT

16.1. LCP: Create Annual Audit Record

1. Go to the Accounts tab.
2. Choose the All CASA Programs view.
3. Click Go! to view the LCP Account.
4. Click the Account Name to open the Account Detail page.
5. Scroll down to the Annual Audits Related List.
6. Click the New Annual Audit button.
7. Fill in all required fields.
8. Select Audit Method (“Accrual”)
9. Click Save.

Expected Result: An Annual Audit is created with an auto-filled Annual Audit Name.

10. Scroll down to the Notes & Attachments section.
11. Upload required documents as outlined in the Instructions section.
12. Click Submit for Approval.

Expected Results: An Annual Audit with supporting documents is created. The audit is sent for approval. The Approval History section shows the current approver and approval status of Pending. The Annual Audit Status is Submitted.

16.2. GMD: Complete an Annual Audit

1. View an Annual Audit with Status Submitted.
2. Click on the Annual Audit Name to open the record.
3. Review Annual Audit and attached document.
4. Click Edit.
5. Complete fields on the Annual Audit page.
6. Click Save.

TIP: Complete all fields before approving an Annual Audit. The Annual Audit record cannot be edited after approval.

16.3. GMD: Approve an Annual Audit

1. Scroll down to the Approval History section on the Annual Audit detail page.
2. Click the Approve/Reject link.
3. Add comments.
4. Click Approve.

Expected Results: The Annual Audit Approval History reflects the approval status Approved. The Status is GMD Approved.
16.4. GMD: Reject an Annual Audit

1. Scroll down to the Approval History section on the Annual Audit detail page.
2. Click the Approve/Reject link.
3. Add comments.
4. Click Reject.

Expected Results: The Annual Audit Approval History approval status is Rejected. The Status is Returned. The ED-level Signer is notified.

17. CHANGE AWARD AMOUNT IN A GRANT

17.1. Admin: Change Award Amount

Note: Active Grants are not editable by GMs.

1. Open the Grant.
2. Click Edit.
3. Fill in the fields in the Additional Award Amount section.

Note: Use a data upload to add additional dollar amounts to multiple grants.

4. If this is not the first change in the Award Amount, go to Edit view and clear the Additional Dollar Amount field. Save the record. Return to Edit view, and enter the new Additional Dollar Amount.

Expected Results: The Award Amount includes the Additional Dollar Amount. The Grant History section shows the previous Award Amount and date of change.

17.2. GM: Generate Contract Document for Grant

1. Open the Grant Detail page.
2. Click Generate Documents to show the Dynamic Document Package (DDP) name and Signer roles.
3. Accept the default delivery method Send with DocuSign.
4. Click Run.

Expected Results: The grant application contract document is sent to the designated grant officials. The Status field is set to Pending Amendment Signature. A new DocuSign Status record (and related recipients) is added to the grant.

17.3. LCP: Sign Contract

Grant officials designated by the LCP receive email for signature from DocuSign in succession.

1. Follow DocuSign instructions to review and sign the contract document.

Expected Results: After all signatures are complete, the Docusign Status record reflects an Envelope Status of Completed, and the grant’s Status field is set to Active.

TIP: To preview a certification document without sending it, choose the Download delivery method.
## 18. Reference: Statuses

ODM records that move through approval processes are assigned relevant Status values along the way. Below is a list of the statuses for each type of object.

<table>
<thead>
<tr>
<th>Grant Application (VOCA and CVC non-growth)</th>
<th>Activity during the period</th>
<th>Record Locked</th>
<th>Status at the end of the activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant application has been set up by GM.</td>
<td>No</td>
<td>CREATED</td>
<td></td>
</tr>
<tr>
<td>Grant application (including budget) has been filled out and submitted by LCP.</td>
<td>Yes</td>
<td>SUBMITTED</td>
<td></td>
</tr>
<tr>
<td>GM will initiate the Drawloop process to create the PDF. Drawloop will send the PDF via DocuSign to obtain certification signatures from LCP.</td>
<td>Yes</td>
<td>PENDING LCP CERTIFICATION</td>
<td></td>
</tr>
<tr>
<td>LCP has certified the application/budget via DocuSign.</td>
<td>Yes</td>
<td>CERTIFIED</td>
<td></td>
</tr>
<tr>
<td>Grant application has been reviewed and returned by GM.</td>
<td>No</td>
<td>RETURNED</td>
<td></td>
</tr>
<tr>
<td>Grant application has been revised and re-submitted by the LCP.</td>
<td>Yes</td>
<td>REVISED</td>
<td></td>
</tr>
<tr>
<td>Grant application has been reviewed and approved by GM.</td>
<td>Yes</td>
<td>GM APPROVED</td>
<td></td>
</tr>
<tr>
<td>GM will initiate the Drawloop process to create the Contract PDF and send the PDF to DocuSign to obtain signatures from LCP.</td>
<td>Yes</td>
<td>PENDING CONTRACT SIGNATURE</td>
<td></td>
</tr>
<tr>
<td>Contract has been signed by LCP and Texas CASA CEO.</td>
<td>Yes</td>
<td>ACTIVE</td>
<td></td>
</tr>
<tr>
<td>(Optional) GM will initiate the Drawloop process to create a Contract Amendment PDF and send the PDF to DocuSign to obtain signatures from LCP.</td>
<td>Yes</td>
<td>ACTIVE – PENDING AMENDMENT SIGNATURE</td>
<td></td>
</tr>
<tr>
<td>(If above step happens) Contract amendment has been signed by LCP and Texas CASA CEO.</td>
<td>Yes</td>
<td>ACTIVE</td>
<td></td>
</tr>
<tr>
<td>End date of grant has passed.</td>
<td>Yes</td>
<td>CLOSED</td>
<td></td>
</tr>
<tr>
<td>Activity during the period</td>
<td>Record Locked</td>
<td>Status at the end of the activity</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------------------</td>
<td>---------------</td>
<td>----------------------------------</td>
<td></td>
</tr>
<tr>
<td>Grant application is created by LCP via button on their CVC grant.</td>
<td>No</td>
<td>CREATED</td>
<td></td>
</tr>
<tr>
<td>Grant application (including budget) has been filled out and submitted by LCP.</td>
<td>Yes</td>
<td>SUBMITTED</td>
<td></td>
</tr>
<tr>
<td>GM will initiate the Drawloop process to create the PDF and send the PDF via DocuSign to obtain certification signatures from LCP.</td>
<td>Yes</td>
<td>PENDING LCP CERTIFICATION</td>
<td></td>
</tr>
<tr>
<td>LCP has certified the application/budget via DocuSign.</td>
<td>Yes</td>
<td>CERTIFIED</td>
<td></td>
</tr>
<tr>
<td>Grant application has been reviewed and returned by GM.</td>
<td>No</td>
<td>RETURNED</td>
<td></td>
</tr>
<tr>
<td>Grant application has been revised and re-submitted by the LCP.</td>
<td>Yes</td>
<td>REVISED</td>
<td></td>
</tr>
<tr>
<td>Grant application has been reviewed and approved by GM.</td>
<td>Yes</td>
<td>GM APPROVED</td>
<td></td>
</tr>
<tr>
<td>GM will initiate the Drawloop process to create the CVC Contract Amendment PDF and send the PDF to DocuSign to obtain signatures from LCP.</td>
<td>Yes</td>
<td>PENDING AMENDMENT SIGNATURE</td>
<td></td>
</tr>
<tr>
<td>Contract Amendment has been signed by LCP and Texas CASA CEO.</td>
<td>Yes</td>
<td>ACTIVE</td>
<td></td>
</tr>
<tr>
<td>End date of grant has passed.</td>
<td>Yes</td>
<td>CLOSED</td>
<td></td>
</tr>
<tr>
<td>Activity during the period</td>
<td>Record Locked</td>
<td>Status at the end of the activity</td>
<td></td>
</tr>
<tr>
<td>----------------------------</td>
<td>---------------</td>
<td>----------------------------------</td>
<td></td>
</tr>
<tr>
<td>Request for reimbursement form (RFR) for the month has been set up (or created) by the LCP.</td>
<td>No</td>
<td>CREATED</td>
<td></td>
</tr>
<tr>
<td>RFR has been filled out and submitted by the LCP.</td>
<td>Yes</td>
<td>SUBMITTED</td>
<td></td>
</tr>
<tr>
<td>GM will initiate the Drawloop process to create the PDF and send the PDF to DocuSign to obtain certifications from LCP.</td>
<td>Yes</td>
<td>PENDING LCP CERTIFICATION</td>
<td></td>
</tr>
<tr>
<td>LCP has certified the application/budget via DocuSign.</td>
<td>Yes</td>
<td>CERTIFIED</td>
<td></td>
</tr>
<tr>
<td>RFR has been reviewed and returned by the GM.</td>
<td>No</td>
<td>RETURNED</td>
<td></td>
</tr>
<tr>
<td>RFR has been revised and submitted by the LCP.</td>
<td>Yes</td>
<td>REVISED</td>
<td></td>
</tr>
<tr>
<td>RFR has been reviewed and approved by GM.</td>
<td>Yes</td>
<td>GM APPROVED</td>
<td></td>
</tr>
<tr>
<td>RFR has been reviewed and approved by DGM.</td>
<td>Yes</td>
<td>DIRECTOR APPROVED</td>
<td></td>
</tr>
</tbody>
</table>
## Budget Revision

<table>
<thead>
<tr>
<th>Activity during the period</th>
<th>Record Locked</th>
<th>Status at the end of the activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget revision has been requested (by LCP).</td>
<td>No</td>
<td>CREATED</td>
</tr>
<tr>
<td>Budget revision has been filled out and submitted by the LCP.</td>
<td>Yes</td>
<td>SUBMITTED</td>
</tr>
<tr>
<td>GM will initiate the Drawloop process to create the PDF and send the PDF to DocuSign to obtain certifications from LCP.</td>
<td>Yes</td>
<td>PENDING LCP CERTIFICATION</td>
</tr>
<tr>
<td>LCP has certified the application/budget via DocuSign.</td>
<td>Yes</td>
<td>CERTIFIED</td>
</tr>
<tr>
<td>Budget revision has been reviewed and returned by GM.</td>
<td>No</td>
<td>RETURNED</td>
</tr>
<tr>
<td>Budget revision has been revised and submitted by the LCP.</td>
<td>Yes</td>
<td>REVISED</td>
</tr>
<tr>
<td>Budget revision has been reviewed and approved by GM.</td>
<td>Yes</td>
<td>GM APPROVED</td>
</tr>
<tr>
<td>Formal budget revision has been reviewed and approved by DGM.</td>
<td>Yes</td>
<td>DIRECTOR APPROVED</td>
</tr>
<tr>
<td>All necessary approvals have been completed (DGM for formal, GM otherwise).</td>
<td>Yes</td>
<td>APPROVALS COMPLETE</td>
</tr>
</tbody>
</table>

## Annual Audit

<table>
<thead>
<tr>
<th>Activity during the period</th>
<th>Record Locked</th>
<th>Status at the end of the activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Audit for a fiscal year has been created (either via data upload or by the LCP, to be determined).</td>
<td>No</td>
<td>CREATED</td>
</tr>
<tr>
<td>Annual Audit has been filled out (with attachments added) and submitted by the LCP.</td>
<td>Yes</td>
<td>SUBMITTED</td>
</tr>
<tr>
<td>Annual Audit has been reviewed and returned by the GMD.</td>
<td>No</td>
<td>RETURNED</td>
</tr>
<tr>
<td>Annual Audit has been revised and submitted by the LCP.</td>
<td>Yes</td>
<td>REVISED</td>
</tr>
<tr>
<td>Annual Audit has been reviewed and approved by GMD.</td>
<td>Yes</td>
<td>GM APPROVED</td>
</tr>
</tbody>
</table>
19. REFERENCE: TRAINING RESOURCES