

PCCD Egrants New User

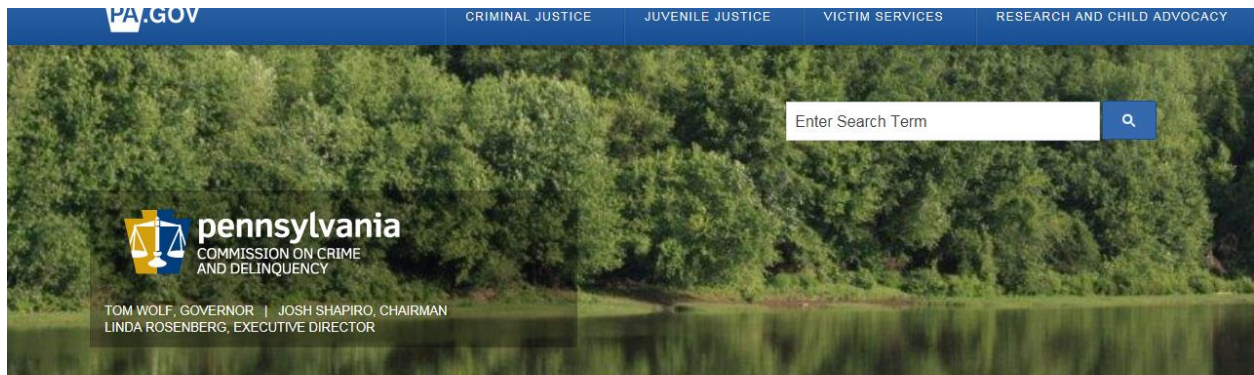
Quick Start Guide and Required Forms

5/13/2016

Revised for simplicity, this version of the User Guide is designed to assist first-time applicants and their supporting organization to register for the PCCD Egrants grant management system.

PCCD Egrants New User Quick Start Guide

1. Access the **PCCD Egrants site** by going to:
<http://www.pccd.pa.gov/Funding/Pages/Egrants-Home.aspx>
2. If the page you see does not look similar to the following page, you are not at the right spot. Call the Egrants Help Desk at (717) 787-5887 or toll-free within Pennsylvania at (800) 692-7292 and ask the operator to connect you with the EGRANTS help desk.



[PCCD](#) > [Funding](#) > Egrants Home

WELCOME TO PCCD EGRANTS

APPLY FOR AND MANAGE YOUR GRANTS ON THE WEB

[Login to Egrants](#)

[New User Quick Start](#) - An easy-to-follow guide for registering with Egrants includes both forms referenced below.

[New User Registration](#) - Register online for access to PCCD's Egrants system

[Agency Registration Request Form](#) - Your agency must be properly registered in Egrants if you intend to apply for a grant.
Use this form to register your agency in Egrants.

[New User Role Request Form](#) - This form is used to establish the necessary roles for your Egrants access.

For questions about the Egrants system, call the Help Desk at (717) 787-5887 or toll-free within Pennsylvania at (800) 692-7292 and ask for the Egrants Help Desk.
Please note: While Egrants will accept your application up until midnight of the due date, Help Desk staff will not be available after 4:00 p.m.

Figure 1

3. Choose the “ **New User Registration - Register online for access to PCCD's Egrants system**” link to proceed to the User Registration screen shown below in **Figure 2** . Fields that contain an asterisk are required and must have values entered. Note: The “County” field only requires completion if the “State” is identified as Pennsylvania. Please use upper and lower case letters to complete this form. Review the *Standards for Data Entry Quick Start Guide* on page 9 of this guide for additional tips. When you have completed all the required fields, click on the Submit button at the bottom of the screen.



PCCD Egrants User Registration

Fill in the form below to complete your registration into the PCCD Egrants system.
Already have an account? Please [Log in](#) now.

Courtesy Title: * [Courtesy Pick...](#)

First Name: *

Middle Initial/Name:

Last Name: *

Title: [Title Pick...](#)

Suffix: [Suffix Pick...](#)

Email Address: *

Preferred Contact Method: *

Address Type: Envelopes/Labels

Agency Name:

Floor/Suite/Building:

Street Address: *

P.O. Box:

City: *

State: * Zip Code: *

County: *

Country: *

Phone: * () - Extension:

Fax: () -

User ID: * ← **Note: The User ID must include 6-14 characters, beginning with a letter as the first character, followed by alphanumeric characters**

Password: *

Confirm Password: *

If you ever lose your User ID or Password, we will ask you the following question, and need to receive your chosen answer to confirm your identity.

Question: *

Answer: *

[Submit](#) [Start Over](#)

Remember your choice for the "User ID" and the "Password" you select, as you will need them later.

Figure 2

Please note: If your email address is already a registered user within the Commonwealth, and you attempt to register in Egrants, you will be transferred to the "Site Access" screen to login with your Commonwealth User ID and Password. Once you log in, you can follow along beginning with step 4 below.

- Once the previous step is completed, and you agree to the terms and conditions, you will be taken into the Egrants system to the page shown in **Figure 3**

Figure 3

You will not have access to the full Egrants system until security is established with PCCD. Until then, you will only be able to access User Management Profiles and the Work Manager tab.

5. To update the User Management Profiles and the Work Manager sections of the screen shown in Figure 3, you will need to reference the *User Management Access Request Quick Start Guide* on page 11 of this guide

There are two important bits of information you will need to know in order to proceed:

- Has your agency or organization ever applied for a grant via PCCD’s Egrants system?
 - Does your agency or organization have an existing Egrants “User Manager”?
- A. **If your agency has never applied for funding from PCCD through the PCCD Egrants system** you must have someone complete the Egrants Agency Registration Request Form found on page 17 before you can proceed. You should log off the Egrants system until your agency or organization is established.
 - B. **If your agency does not have a User Manager**, Update your profile information by choosing the ‘Profiles’ link in the top center of the screen (see Figure 3). This information should have been copied from when you completed step 3 above. Be certain to verify all information and press the save button at the bottom of the page. Then choose the ‘Access Requests’ link in the top center and

follow the steps in the PCCD Egrants *User Management Access Request Quick Start Guide* found on page 9. You will only get to step 5 of the *User Management Access Request Quick Start Guide* before you determine that your agency or organization has no 'User Manager'.

At that point you must complete the *Egrants User Role Request Form* found on page 16 and return it to PCCD Egrants Support by FAX (717) 783-7165 or by email to RA-eGrantsSupport@pa.gov

- PCCD will process your security request.
- Egrants Support Staff will contact you either by email or phone once your roles are established. Once those roles are established, you will have full access to the Egrants system.

C. **If your agency has a User Manager,** Update your profile information by choosing the 'Profiles' link in the top center of the screen (see Figure 3). This information should have been copied from when you completed step 3 above. Be certain to verify all information and press the save button at the bottom of the page. Then choose the 'Access Requests' link in the top center and follow the steps in the PCCD Egrants User Management Access Request Quick Start Guide found on page 11 to:

- Make your User Manager aware of which grants that you would like access to.
- Select the role(s) that you are requesting within the agency.
- When you are finished selecting roles, submit the request to your User Manager.
- Egrants will notify your User Manager via Work Manager in Egrants to review your request.
- You will receive an Alert via Egrants Work Manager when you are provided with security. You may then proceed to assess Egrants fully. Your User Manager may also contact you.

*Appendix of
Supporting
Documents*

The purpose of this guide is to provide a quick reference for Egrants User Managers as they manage access to their agency's projects within the Egrants system. Additional information on the registration process and user management is available on the Egrants website at: <http://www.pccd.pa.gov/Funding/Pages/How-to-Get-and-Manage-Funds.aspx>.

In order to provide as much flexibility as possible to applicant agencies, security within the Egrants system is role-based. There are six security roles available to applicant agencies, and individual users may have any combination (including all) of these roles. In addition, User Managers may choose to assign roles on a project-by-project basis, or they may assign roles to a user for all of the agency's projects.¹

The six roles are as follows:

<u>ROLE</u>	<u>DESCRIPTION</u>
1. PROGRAM READER	This role allows a user READ-ONLY access to all programmatic data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all narrative sections not specifically associated to the budget; and all sections devoted to performance measurement. Examples include, but are not limited to: Problem Description; Project Description; and Performance Measures.
2. PROGRAM CREATOR	This role allows a user READ/WRITE access to all programmatic data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all narrative sections not specifically associated to the budget; and all sections devoted to performance measurement. Examples include, but are not limited to: Problem Description; Project Description; and Performance Measures. This role can also submit program reports.
3. FINANCIAL READER	This role allows a user READ-ONLY access to all financial data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all budget sections and line items; and some contractual sections such as Recipient Agency Budget.

¹ Users do not have to be employees of an agency to receive access. If an applicant agency is working on a project with another agency (via pass-through or other contractual arrangement) the applicant's User Manager can grant access to that project to a member of the other agency provided that person has registered on the Egrants system and requests access.

ROLE

DESCRIPTION

4. FINANCIAL CREATOR This role allows a user **READ/WRITE** access to all financial data within a project. This includes all summary project data (the kind of information that would, in the past, have appeared on the first page of a printed application); all budget sections and line items; and some contractual sections such as Recipient Agency Budget. This role can also submit fiscal reports.
5. SUBMISSION This role allows a user to **SUBMIT** applications, modifications, and continuations. A user without this role may work on a project, but will not be able to submit it to PCCD. Similarly, if a project were returned to the applicant for revisions, only users with this role could re-submit the revised project. This role can allow agencies (particularly larger ones) to enforce some level of review over what is submitted to PCCD.
6. USER MANAGER Though the title can be somewhat confusing, this role allows a user to **MANAGE SECURITY ROLES** (access) for an agency's projects. While agencies can have as many User Managers as they need to accommodate their business processes, PCCD will only set up the first User Manager per agency. Because we make over 1300 grants per year, some to very large agencies, we cannot handle user management tasks for all our applicants. Each applicant agency registering in the Egrants system will be required to designate a person as their User Manager, and PCCD will establish the appropriate role(s) for that person. That person then assumes the responsibility for managing users for the applicant agency's projects. (We strongly recommend that the agency have more than one User Manager to cover in case of illness/accident, but it would be the initial User Manager's responsibility to create second and subsequent User Managers.)

NOTE ON ACCESS REQUESTS: In order for a User Manager to grant access to a project, a system user must first request access. Several agencies have asked that we give User Managers the ability to grant access without first receiving this request. We CAN NOT do this. To do so, we would have to allow a User Manager to search through personal demographic data for all people stored in our system. Because the system maintains some data that is not associated with public documents, we cannot allow this. We apologize for any inconvenience this may cause.

Appendix B Egrants Data Entry Quick Start Guide

These standards have been compiled to ensure that all users enter data in a uniform manner, to avoid duplication.

In order to prevent multiple entries, **it is imperative that you do a thorough search to make sure the individual or agency you are planning to enter is not already in the system.** However, please keep in mind that some of the converted data in our Egrants system might not conform to these standards; therefore, your search criteria should be as broad as possible to take other variations into consideration. For example, if “Pennsylvania” is part of your agency’s name, before entering it you should search for “Penn” and “Pa” to see whether it is listed. If you find the individual or agency you are looking for but the entry does not conform to these standards, please make the appropriate modifications, i.e., if Pennsylvania is part of your agency’s name but the current entry shows Pa, change it to read Pennsylvania..

General

- Do not use abbreviations unless it is part of the corporate/agency title
- Do not change the default font style or size.

Titles

The title “Honorable” should be used for elected and highest-ranking appointed officials such as: Governor, Lieutenant Governor, Cabinet members, and elected officials such as state legislators, members of Congress, district attorneys, district justices, judges, and county commissioners.

The following titles should appear in the “**courtesy title**” block (rather than using Mr. or Ms. and putting a title in the “**title**” block): Chief, Warden, Sheriff, Superintendent (State Correctional Institutions, and School Districts), Commissioner (as in Police Commissioner), etc. For example:

Chief Samuel Blank
Pikesburg Police Department

Warden Arthur Shepherd
Blattstown Prison

Superintendent Charles
Spotsylvania School District

Justice Sheriff Max Hollie
Orange County Sheriff’s Office

You can use Mr. or Ms. or any other courtesy title and place information in the “**Title**” box if they are different, Example: Mr. in “**Courtesy Title**” box and Executive Director in the “**Title**” box . Do not use Chief in the “**Courtesy Title**” box and then Chief of Police in the “**Title**” box.

As indicated in paragraph two, if you notice a particular entry does not conform to these standards, in the interest of uniformity, please make the necessary change(s) to bring it into compliance.

Agency Name

- Do not include “The” or “A” unless it is part of the agency’s official name.
- The name of the county/city/township/borough, etc. should come first, i.e., Lehigh County as opposed to County of Lehigh.
- Add county name to offices within that county, i.e., Allegheny County Court of Common Pleas, Bucks County District Attorney’s Office, Cambria County Public Defender’s Officer, etc.

Physical Location/Address

- Courthouse (one word)

- When identifying room numbers in a building, use Room “[#]” then building name, i.e., Room 25 Municipal Services Building rather than 25 Municipal Services Building or Municipal Services Building - Room 25.
- Suite numbers should come after the building name. If there is no building name, it should follow the street address (on the same line).

Email Address

Email addresses are required. This helps us to contact you with any information as fast as possible. If you do not have an email address there is a default address that can be used, **yourlastname@example.com** (**Example: smith@example.com**), if you use this address you will not be contacted by email with any information but will receive a hard copy in the mail, this will take longer for you to receive the information

Appendix C PCCD Egrants User Management Access Request Quick Start Guide

Note: Some User Managers have asked us if they can just grant access to their users without users first having to request access. Unfortunately, this would require User Managers to search through our entire database of people. This would mean a User Manager would have access to names, addresses, and phone numbers for everyone in our database (over 7000 people). In some cases, this includes confidential addresses and home and cell phone numbers. Therefore in order to protect our clients' privacy, we must require that individual users initiate the requests.

- A. Once you have completed and saved your profile, click on the **“User Management”** tab on the menu bar. You will be transferred to the **“User Access Request”** page. (You can also click on the **“Access Requests”** link below the tabs for the same result.)
- B. Click on the **“Join New Agency”** button. You will be transferred to the **“Join Agencies Search”** page.

Back Button will not take you back pages, instead use the application menus and controls.

[Main Menu](#) | [User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Work Manager](#)

[Profiles](#) | [Access Requests](#)

User ID: 0477
User Name: User Manager

USER ACCESS REQUEST

Current Agency/Project Roles Access

Click "Join New Agency" button to request a role(s) for a new agency or select an "Agency" table link to request role modification at an existing agency.

Agency	GrantID	User Role
Request for Role Modification	[All]	Agency Program Creator, Agency Submission

Filter Criteria:
Request History Status: [All] ▼

Request History

Agency	GrantID	User Role	Requested Date/Time	User Manager	Status
Request for Role Modification	[All]	Agency Program Creator, Agency Submission	9/8/2014 11:37:53 AM	Mr. Holly Bennett	Completed

Please send technical comments and problems to [EGRANTS_Support@Current_Development_STI](#)

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- C. Enter some information about your agency in the search criteria boxes. You may search on the **“Agency Name”**, **“City”** or select a county from the **“County”** dropdown list. (You can also enter partial information in the text boxes. For example if you want a listing of all agencies that begin with the letter **“P”** just enter **“P”** in the **“Agency Name”** box.) You may use any combination of criteria to search.

Back Button will not take you back pages, instead use the application menus and controls.

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User ID: -8477

JOIN AGENCIES SEARCH

Search Criteria:

Agency Name:

Tax ID:

City:

County:

State:

Agency Name	Tax ID	Address	County	City	State
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D. Click on the “Search” button. Records that match your criteria will be displayed in the grid. If there are no records that match your criteria the message “No records found!” will be displayed above the grid. In many cases, this might happen if you spell your agency name differently than it is entered in the system. For example, if you enter “PA” the system won’t find “Pennsylvania.” It’s best to use fewer letters to find your agency.

Back Button will not take you back pages, instead use the application menus and controls.

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User ID: -8477

JOIN AGENCIES SEARCH

Search Criteria:

Agency Name:

Tax ID:

City:

County:

State:


Agency Name	Tax ID	Address	County	City	State
Big Brothers Big Sisters of Beaver County	0000000000	1000000000	Beaver	New Brighton	Pennsylvania
Big Brothers Big Sisters of Bradford County	0000000000	1000000000	Bradford	Towanda	Pennsylvania
Big Brothers Big Sisters of Bucks County, Inc.	0000000000	0000000000	Bucks	Jamison	Pennsylvania
Big Brothers Big Sisters of Greater Pittsburgh	0000000000	0000000000	Allegheny	Pittsburgh	Pennsylvania
Big Brothers Big Sisters of Indiana County, Inc.	0000000000	0000000000	Indiana	Indiana	Pennsylvania
Big Brothers Big Sisters of Lancaster County	0000000000	0000000000	Lancaster	Litz	Pennsylvania
Big Brothers Big Sisters of Lycoming County	0000000000	0000000000	Lycoming	Williamsport	Pennsylvania
Big Brothers Big Sisters of Montgomery County	0000000000	0000000000	Montgomery	Normstown	Pennsylvania
Big Brothers Big Sisters of the Capital Region	0000000000	0000000000	Dauphin	Harrisburg	Pennsylvania
Big Brothers Big Sisters of the Central Susquehanna Valley	0000000000	0000000000	Northumberland	Sunbury	Pennsylvania
Big Brothers Big Sisters of the Lehigh Valley, Inc.	0000000000	0000000000	Lehigh	Allentown	Pennsylvania
Big Brothers Big Sisters of York County, Inc.	0000000000	0000000000	York	York	Pennsylvania
Big Brothers Big Sisters Southeastern Pennsylvania	0000000000	0000000000	Philadelphia	Philadelphia	Pennsylvania

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E. Click on the “Agency Name” for the agency that you wish to join. You will be transferred to the “Join Agency” page. The agency information will be filled in on the page automatically. If this is not the correct agency, click on the “Cancel” button to be returned to the previous page. **Note: The address displayed is for the agency not the user.**

Note: If the User Manager(s) reflects “None,” your agency does not have a user manager and PCCD must process your security request. Complete the “PCCD Egrants User Role Request Form,” found on page 16 and FAX to PCCD Egrants Support at (717) 783-7165.

- F. Enter a reason for the request for access to this agency in the “Reason For Request:” text box in the middle of the page. If you do not enter a reason you will receive a validation message – **“Must enter request reason.”**
- G. Select the “GrantID” or “All” in the “Requests” section of the page. This dropdown will have all of the grants for the agency that you are requesting access to. If there are no grants yet for this agency, the dropdown will only have “All” listed. You may be granted access to only a specific grant if that is the only one you are working with. The agency “User Manager” is the one who will make the decision as to what you have access to.
- H. Select the role that you are requesting for this agency from the “Roles Requested” dropdown. There are 6 to choose from. You may request more than one role. Select the first one you wish to add by clicking on it (it will receive the focus and be highlighted in blue) and then click the “Add Role Request” button. Do this for as many roles as you are requesting. See the section *entitled PCCD Egrants Security Roles Quick Start Guide* on page 9 above for more information about the roles.


System will time out at: 11:12:08
Remaining time: 12:01

(System Test/Curr) [Logout](#)

Back Button will not take you back pages, instead use the application menus and controls.

[Main Menu](#) | [User Management](#) | [Funding Announcement](#) | [Project Management](#) | [Work Manager](#)

[Profiles](#) | [Access Requests](#)

User ID: 6477

JOIN AGENCY

Agency Name: Big Brothers Big Sisters of Bradford County
 Street Address 1: 10 Park Street
 Street Address 2:
 County:
 City:
 State:
 Zip Code:
 User Manager(s):
 Reason For Request*:

Requests

GrantID-Project:

Roles Requested:

Requested Action	Requested GrantID-Project	Requested Role

Current GrantID-Project	Current Roles	Current Role

Please send technical comments and problems to [EORANTS Support \(Current Development ST\)](#)
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 v3.1.938.0 / fr1.5.136.5 / rev4.1.3.0

- I. When you are finished adding roles, click on the “Submit Request” button at the bottom of the page. You will be transferred back to the “**User Access Request**” page. The request will now display in the “Request History” section of the page. The system will place a task in the User Manager’s “Work Manager” to review your request, but it is advisable to let the User Manager know you have completed a request.

*PCCD Egrants Forms
Section*

IMPORTANT

DO NOT SUBMIT THIS FORM TO PCCD UNTIL YOU HAVE COMPLETED STEPS 1 THROUGH 4 LISTED ON THE PCCD Egrants New User Quick Start Guide

Submission of this form is Step 5B of the PCCD EGRANTS NEW USER QUICK START GUIDE.

This form must be completed and sent to PCCD before appropriate permissions to the PCCD Egrants system can be assigned. There is a minimum of three roles that need to be assigned within your agency before you will be capable of applying online. Those roles include: Program Creator, Financial Creator and Submission. These roles may be assumed by one person or by three different individuals. **A separate form must be completed and submitted for EACH PERSON in your agency who will be working in the Egrants system.**

Please type or print:

Individual Name:	
Applicant Agency Name (<i>appearing on the Grant</i>):	
User ID: (The one you chose in Step 3 of <i>PCCD Egrants New User Quick Start Guide</i>)	
Telephone: (with area code)	
Email address:	
County (if state is Pennsylvania)	

Please refer to the *PCCD Egrants Security Roles Quick Start Guide* for roles and descriptions when completing the table below.

Grant Number	Program Reader	Program Creator	Financial Reader	Financial Creator	Submission
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Select the roles desired and identify the grant number(s) or specify 'All' to request the security role(s) for all grants for the Applicant Agency identified.

Check this box for access to the Egrants Training Area

When fully completed, submit this form to **PCCD Egrants Support** by FAX to (717) 783-7165.

If you have any questions regarding this form, please contact the **PCCD Egrants Help Desk** by calling (717) 787-5887 or, in PA, dial toll-free (800) 692-7292 and ask for the Egrants Help Desk

I hereby authorize the above named individual to be granted access permissions as identified on this request for the agency/organization listed hereon.

_____	_____
Printed Name of Authorized Official	Signature
_____	_____
Title of Authorized Official	Date

For PCCD use only:

Date Received	Verification (if necessary)	Date Roles Enabled	Roles Enabled By

This form must be completed and faxed or emailed to PCCD if your agency has never applied for a grant via PCCD's Egrants system.

Please type or print. All fields and questions MUST be completed unless otherwise noted.

Complete Legal Agency Name	
Agency Address Line 1	
Agency Address Line 2	
City, State, Zip+4 (plus 4 required)	
Agency Federal ID Number	
Agency Fiscal Year End Date	
Agency Phone Number	
Agency Fax Number	
US Congressional District (Ex. PA10)	
Agency County	
Name of person completing this form	
Contact Person's Phone Number	
Contact Person's Email Address	
DUNS Number (if available)	

When fully completed, submit this form to PCCD Egrants Support by FAX to (717) 783-7165 or by email to RA-eGrantsSupport@pa.gov

If you have any questions regarding this form, please contact the PCCD Egrants Help Desk by calling (717) 787-5887 or, in PA, dial toll-free (800) 692-7292 and ask for the Egrants Help Desk.

I hereby request the above agency be registered in Egrants in order to submit a concept paper and/or application to PCCD via PCCD's Egrants system:

Printed Name of Authorized Official

Signature

Title of Authorized Official

Date

For PCCD use only:

Date Received	Verification (if necessary)	Date Agency Registered	Agency Registered By