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Introduction

Welcome to Grants Management System (GMS), which you will use in partnership with the San Francisco Mayor’s Office of Housing and Community Development and/or Office of Economic and Workforce Development to propose, set up, and report on grants provided to you by those City departments.

The new system is being developed in phases. The following tools are available now, and instructions for each are included in this guide:

✓ User account administration
✓ Agency information
✓ Project information
✓ Project contact information
✓ Project negotiation
✓ Agency Document Upload
✓ Grant Agreement
✓ Budget Fund Source Allocation
✓ Reporting and Invoicing (Capital and Non-Capital Projects)
✓ Budget Revisions
✓ Entering and viewing client information one-by-one
✓ Entering multiple client’s at once
✓ Enrolling clients in activities
✓ Reporting non-client activity progress

If you ever have any technical questions using this Grants Management System, please call Cityspan’s Help Desk toll-free at: 866-469-6884
(Monday through Friday, 8:00 AM – 5:00 PM, Pacific Time)

If you ever have any questions regarding project information, what to enter, submission deadlines, or any other administrative items, please contact your Grant Coordinator.
Grants Management System Access

Your Grants Management System (GMS) user account information is sent to you via a Welcome email. To obtain access, please contact one of your organization’s Signatory level users (a user at your agency with access to all screens and ability to submit all forms).

User Levels

To start, only two User Levels will be implemented – these are the only two levels that have access to GMS. These levels are:

*Signatory* – this is the highest level user at an organization; this user has access to all screens and ability to edit, save and submit all forms; this level should be assigned only to those with sign-off authority, as they can sign-off on proposal submissions, as well as reporting and reimbursement requests. An agency can create multiple Signatory users, who are the only users with permission to create, modify, and delete agency user accounts.

*Agency Admin* – this level has access to all screens and ability to edit and save all forms; this level cannot submit forms that require authorized sign-off (i.e., proposal submissions, reporting/reimbursement requests).

Logging In

To login to GMS:
1. Go to gms.sfmohcd.org
2. Enter the Username and temporary Password sent to you by email (if you do not yet have a Username, please contact one of your organization’s Signatory level users to set you up with access to the system)
   
   If you forget your password, click ‘forgot password’ and follow the instructions.
3. Click Enter System
4. The first time you log in, the system will prompt you to enter a new password; passwords must be at least eight characters in length.
Logging Out and Timing Out

To logout, click **Logout** in the upper right corner.

For security, GMS will timeout after 90 minutes of inactivity. If you time out, then you will be logged out automatically. Before auto-login, the system displays a warning message to you letting you know what time auto-login will occur if there is no further activity.

GMS Account Administration

You may change your own username, password, email address, and other account information.

View/Update Your Own Account Information

To administer your own account:
1. After logging in, click **My Account Settings** in the left side menu
2. Enter updated information and then click **Save**
Administering Users at Your Agency

All users may view the list of their own agency’s users; however, only a *Signatory* level user may make any changes, including add/edit/delete. Your Grant Coordinator can also help with your agency’s user accounts.

### To view all user accounts at your agency:

1. Click **Agency Users** in the left side menu
2. View the list

### To administer user accounts at your agency (*Signatory* level users only):

**Currently, only Add a New User is available (edit and delete will be available soon)**

1. Click **Agency Users** in the left side menu
2. To create a new user, enter all information under “Create a new agency user,” then click ‘create a new user’ – the system will send an email to the new user’s email address with their login information

   To change a user’s level, find that user in the user list, then click the radio button under the new level and, finally, click ‘update agency user roles’

   To deactivate a user, find that user in the user list, then click the radio button in the “Inactive” column and, finally, click ‘update agency user roles’
Agency Information

You are able to view and update your agency’s information, including contact info.

View/Update Your Agency Information

To view/update Agency information:
1. After logging in, click **Agency Information** in the left side menu
2. Review/update information in the available fields
3. If you select No to “Is the Executive Director your primary contact?” then a section for “Primary Contact” information will appear – complete the fields
   - Fields in the “Vendor Compliance” section are editable only by the City.
4. Click **Save** to save your entries
Project Information

You are able to view information regarding your agency’s projects with MOHCD/OEWD. There are two sections: “CCSF Project Setup” and “Work Plan.” Only MOHCD and OEWD can edit project setup information. If you find an error or need an update in this section, please contact your Grant Coordinator.

View Project Information

To view project information:
1. After logging in, click Agency Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view; you will be taken to the Project Documents screen

Note: Only MOHCD and OEWD can update the items in the section titled “CCSF Project Setup,” which include Project Information and Fund Sources. You may view this information at any time; if you find an error or need an update, please contact your Grant Coordinator.
4. Click ‘Project Information’

**Funding Sources Information**

You are able to view information regarding your agency’s projects with MOHCD/OEWD. There are two sections: “CCSF Project Setup” and “Work Plan.” Only MOHCD and OEWD can edit fund source information. If you find an error or need an update in this section, please contact your Grant Coordinator.

**View Funding Sources Information**

To view funding sources information:
1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view; you will be taken to the Project Documents screen

![Project Documents](image)

Note: Only MOHCD and OEWD can update the items in the section titled “CCSF Project Setup,” which include Project Information and Fund Sources. You may view this information at any time; if you find an error or need an update, please contact your Grant Coordinator.

4. Click ‘Funding Sources’

![Funding Sources](image)

### Project Contact Information

#### View/Edit Project Contact Information

For each of your agency’s projects, you may view and edit the project’s contact information. *Whoever is the Project Contact will receive communications regarding that project’s negotiations, status updates, etc.* – you may designate someone else as a Negotiation Contact if necessary (see instructions below).
To view project contact information:
1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click ‘**Project Contact Information**’

To edit project contact information:
1. After logging in, click **Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click ‘**Project Contact Information**’
5. **Enter information**
   If the Project Contact you entered will not be involved with negotiation, then click the “Yes – different people” radio button under “Is Negotiation Contact a different person than Project Contact?” and enter the Negotiation Contact’s information (this person will receive all negotiation emails).

6. **Click a button at the top of the screen, as follows:**

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Save</strong></td>
<td>saves your work and allows you to come back later to complete</td>
</tr>
<tr>
<td><strong>Save and Return</strong></td>
<td>saves your work, allows you to come back later to complete, and returns you to the previous screen</td>
</tr>
<tr>
<td><strong>Submit</strong></td>
<td>submits the completed item and locks you from further changes unless you click <strong>Unlock</strong></td>
</tr>
<tr>
<td><strong>Return</strong></td>
<td>returns you to the previous screen <strong>without saving any changes</strong></td>
</tr>
</tbody>
</table>

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(Monday through Friday, 8:00 AM – 5:00 PM, Pacific Time)

If you ever have any questions regarding project information, what to enter, submission deadlines, or any other administrative items, please contact your Grant Coordinator.
Negotiation

Negotiation is where project details are agreed upon by the grantee (you) and the City (MOHCD or OEWD) and then finalized before going live. Agreed-upon negotiated items will appear in the Grant Agreement.

Negotiation Overview

Negotiated items include each project’s:
1. Narrative
2. Activities & Outcomes
3. Neighborhoods Served
4. Budget

You will update or accept entries for each of these items in a back-and-forth fashion with your Grant Coordinator until you both agree on all details.

Your agency’s Negotiation Contact will receive an email whenever a negotiated item within a project is ready for your agency’s review. Your Negotiation Contact is either the Project Contact or Negotiation Contact set up within Project Information – instructions to view and edit Project Contact Information are on page 7 of this document.

Only those at your agency assigned user level Signatory or Agency Admin are able to perform project negotiations. For user account and access level needs, please contact one of your agency’s Signatory level users, who can set up and edit accounts at your agency. See Administering Users at Your Organization.

During project negotiation, only one side may work on each of the negotiated items at a time. You can see who’s turn it is by selecting one of your agency’s projects and then looking to the right of each negotiated item, where the system will show the status, “Held By:” followed by either “Grantee” or “City” – if it says “Held By: Grantee,” then it is your turn to take action; if it says “Held By: City,” then your Grant Coordinator must take action.

Once both you and your Grant Coordinator agree on all details for all items (you both submitted all items with no further changes), the project will undergo MOHCD/OEWD Fiscal review. If the proposed budget is not approved, Fiscal will provide a reason and send it back to your Grant Coordinator who will work with you to resolve any issues. Once Fiscal approves, the project will undergo MOHCD/OEWD Manager final review. If the proposed project is not approved, the Manager will provide a reason and send it back to your Grant Coordinator who will work with you to resolve any issues. Once the Manager approves, you will be able to print and sign the Grant Agreement and the project setup may be finalized by your Grant Coordinator to go live.
First Things First: Who Goes First?

In most cases, you will start the negotiation for each item. There are certain situations, however, the City needs to start. You can tell who starts by looking at the Project Information screen under the “Who Starts Negotiation” section.

To view settings on Who Starts Negotiation for a project:
1. After logging in, click Agency Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click Project Information
5. Review the “Who Starts Negotiation” section, where you will see an indication of who will start negotiation for each item (if you need any of these to be changed, please contact your Grant Coordinator)

Negotiation Basics

The negotiation process may begin once your Grant Coordinator finalizes and submits Project Information. When that occurs, a status of “Submitted” will appear next to ‘Project Information’ on the Project Documents screen. The Negotiation Contact at your agency will receive an email when negotiations may begin.
Once the Project Information is submitted, all the negotiation items (Narrative, Activities & Outcomes, Neighborhoods Served, Budget) are ready for review and responses. To the right of each item, you will see a status that tells whose turn it is to review (you or the City – whoever is noted after “Held By:”).

<table>
<thead>
<tr>
<th>WORK PLAN</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Contact Information</td>
<td>Not Submitted</td>
</tr>
<tr>
<td>Narrative</td>
<td>Held By: GRANTEE</td>
</tr>
<tr>
<td>Activities and Outcomes</td>
<td>Held By: GRANTEE</td>
</tr>
<tr>
<td>Neighborhoods Served</td>
<td>Held By: CITY</td>
</tr>
<tr>
<td>Budget</td>
<td>Held By: CITY</td>
</tr>
</tbody>
</table>

You may review and respond only to those items that say “Held by: GRANTEE”

If at any time during the negotiation process, you would like to see an overview of all the latest details for the project and all negotiation items in one place, you may click the link ‘Summary of Latest Version’ which will open a PDF with those details.

When you are in edit mode for any of your negotiation items, you will have access to four buttons, each of which has a different result, as follows:

- **Save**: saves your work and allows you to come back later to complete; the item remains held by **you**
- **Save and Return**: saves your work, allows you to come back later to complete, and returns you to the previous screen; the item remains held by **you**
- **Submit**: submits the completed item and locks you from further changes until the City takes action; the item transfers to the **City**
- **Return**: returns you to the previous screen **without saving any changes**; the item remains held by **you**
Negotiating Narrative

To review and respond to Narrative:
1. After logging in, click Agency Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click ‘Narrative’
5. If you are reviewing a response from the City, you will see two buttons: Revise and Accept

Click Revise to make changes to the responses and continue negotiation
Click Accept if you agree with all responses (this will lock Narrative from further negotiation; in case of error, your Grant Coordinator can unlock)
6. If you are starting the negotiation or if you clicked Revise as noted in step 5, then you will be back in edit mode to enter/update responses to each item; answers should be brief – there are character limits noted under each text box
7. Click a button at the top of the screen, as follows:

| Save |

saves your work and allows you to come back later to complete; the item remains held by you
saves your work, allows you to come back later to complete, and returns you to the previous screen; the item remains held by you

Submit

submits the completed item and locks you from further changes until the City takes action; the item transfers to the City

Return

returns you to the previous screen without saving any changes; the item remains held by you

Negotiation Comments for Narrative:
With each response, you may include comments in the “Negotiation Comments” section of Narrative. These comments can be viewed by your Grant Coordinator. You may also review comments entered by your Grant Coordinator. All comments will remain throughout the negotiation, but will not appear anywhere else in the system or in your final Grant Agreement.

Your comments will be saved or submitted with the rest of your responses when you click the Save or Submit button.

Viewing Previous Versions of the Narrative Negotiation:
During negotiations, as you go back and forth with your Grant Coordinator, you may find it helpful to view an earlier submitted version of Narrative. To do so, click the header “+ Versions of this Form” which will cause that section to expand.

You may click on any of the listed versions to view its information (you will be able to view only, not edit). The note “currently viewing” will appear after the item you have
selected. To get back to the current version you are negotiating, you may click the one item listed under the “Current Version” section.

Negotiating Activities and Outcomes

To review and respond to Activities and Outcomes:
1. After logging in, click Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click ‘Activities and Outcomes’
5. If you are reviewing a response from the City, you will see two buttons: Revise and Accept
   Click Revise to make changes to the responses and continue negotiation
Click **Accept** if you agree with all responses (this will lock Activities and Outcomes from further negotiation; in case of error, your Grant Coordinator can unlock)

6. If you are starting the negotiation or if you clicked **Revise** as noted in step 5, then you will be back in edit mode to enter/update Activity and Outcome details. Depending on which Activity you select, you may also see fields for “Activity Sub Category” or “Outcomes” – please complete as appropriate (if you need help in regards to what to enter, please contact your Grant Coordinator)

7. To add a new Client Activity, under the Client Activities section, click **Add a Client Activity** or to delete a Client Activity, click **Delete this Activity** under the Client Activity to be deleted

   To add a new Non-Client Activity, under the Non-Client Activities section, click **Add a Non-Client Activity** or to delete an Non-Client Activity, click **Delete this Activity** under the Non-Client Activity to be deleted

8. Click a button at the top of the screen, as follows:

   - **Save** saves your work and allows you to come back later to complete; the item remains held by **you**
   - **Save and Return** saves your work, allows you to come back later to complete, and returns you to the previous screen; the item remains held by **you**
   - **Submit** submits the completed item and locks you from further changes until the City takes action; the item transfers to the **City**
   - **Return** returns you to the previous screen without saving any changes; the item remains held by **you**

**Negotiation Comments for Activities and Outcomes:**

With each response, you may include comments in the “Negotiation Comments” sections that appear under each individual Activity (Client and Non-Client). These comments can be viewed by your Grant Coordinator. You may also review comments entered by your Grant Coordinator. All comments will remain throughout the negotiation, but will not appear anywhere else in the system or in your final Grant Agreement.
Your comments will be saved or submitted with the rest of your responses when you click the **Save** or **Submit** button.

**Viewing Previous Versions of the Narrative Activities and Outcomes:**
During negotiations, as you go back and forth with your Grant Coordinator, you may find it helpful to view an earlier submitted version of Activities and Outcomes. To do so, click the header “**+ Version of this Form**” which will cause that section to expand.

You may click on any of the listed versions to view its information (you will be able to view only, not edit). The note “currently viewing” will appear after the item you have selected. To get back to the current version you are negotiating, you may click the one item listed under the “Current Version” section.

**Negotiating Neighborhoods Served**

![Image of Negotiating Neighborhoods Served section]
To review and respond to Neighborhoods Served:
1. After logging in, click Agency Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click ‘Neighborhoods Served’
5. If you are reviewing a response from the City, you will see two buttons: Revise and Accept
   - Click Revise to make changes to the responses and continue negotiation
   - Click Accept if you agree with all responses (this will lock Neighborhoods Served from further negotiation; in case of error, your Grant Coordinator can unlock)
6. If you are starting the negotiation or if you clicked Revise as noted in step 5, then you will be back in edit mode to enter/update Neighborhoods Served
7. To add a new Neighborhood, click Add a Neighborhood or to delete a Neighborhood, click Delete this Neighborhood under the Neighborhood to be deleted.
8. Click a button at the top of the screen, as follows:
   - Save saves your work and allows you to come back later to complete; the item remains held by you
   - Save and Return saves your work, allows you to come back later to complete, and returns you to the previous screen; the item remains held by you
   - Submit submits the completed item and locks you from further changes until the City takes action; the item transfers to the City
   - Return returns you to the previous screen without saving any changes; the item remains held by you

Negotiation Comments for Neighborhoods Served:
With each response, you may include comments in the “Negotiation Comments” section of Neighborhoods Served. These comments can be viewed by your Grant Coordinator. You may also review comments entered by your Grant Coordinator. All
comments will remain throughout the negotiation, but will not appear anywhere else in the system or in your final Grant Agreement.

<table>
<thead>
<tr>
<th>Negotiation Comments - City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some comments from your Grant Coordinator regarding my response to some of these items.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Negotiation Comments - Grantee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some comments from your Grantee explaining why I entered what I entered above. If all makes sense, let’s agree to this Narrative.</td>
</tr>
</tbody>
</table>

Your comments will be saved or submitted with the rest of your responses when you click the **Save** or **Submit** button.

**Viewing Previous Versions of the Neighborhoods Served Negotiation:**
During negotiations, as you go back and forth with your Grant Coordinator, you may find it helpful to view an earlier submitted version of Neighborhoods Served. To do so, click the header “**+ Version of this Form**” which will cause that section to expand.

<table>
<thead>
<tr>
<th>- VERSIONS OF THIS FORM</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Version</strong></td>
</tr>
<tr>
<td>Owner</td>
</tr>
<tr>
<td>GRANTEE (currently viewing)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Previous Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner</td>
</tr>
<tr>
<td>CITY</td>
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<tr>
<td>CITY</td>
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<tr>
<td>CITY</td>
</tr>
<tr>
<td>CITY</td>
</tr>
<tr>
<td>GRANTEE</td>
</tr>
</tbody>
</table>

You may click on any of the listed versions to view its information (you will be able to view only, not edit). The note “currently viewing” will appear after the item you have selected. To get back to the current version you are negotiating, you may click the one item listed under the “Current Version” section.
Negotiating Budget

To review and respond to Budget:
1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view
4. Click ‘**Budget**’
5. If you are reviewing a response from the City, you will see two buttons: **Revise** and **Accept**

Click **Revise** to make changes to the responses and continue negotiation
Click **Accept** if you agree with all responses (this will lock Budget from further negotiation; in case of error, your Grant Coordinator can unlock)

6. If you are starting the negotiation or if you clicked **Revise** as noted in step 5, then you will be back in edit mode to enter/update Budget information
7. Select which line items you are budgeting by clicking next to the ones you will use in the “Setup: Select line items” section; as you check the boxes, the sections and
fields for those line items will appear below (to remove a line item, unselect it from this list)

<table>
<thead>
<tr>
<th>Setup: Select line items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary</td>
</tr>
<tr>
<td>Fringe</td>
</tr>
<tr>
<td>Contractual Service</td>
</tr>
<tr>
<td>Equipment</td>
</tr>
<tr>
<td>Insurance</td>
</tr>
<tr>
<td>Travel and Conferences</td>
</tr>
<tr>
<td>Space Rental</td>
</tr>
<tr>
<td>Telecommunications</td>
</tr>
<tr>
<td>Utilities</td>
</tr>
<tr>
<td>Supplies</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Indirect Costs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Grant Award</th>
<th>Currently Budgeted Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$75,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

8. Note the Total Grant Award and Currently Budgeted Amount entries; you may save interim budgets that do not yet balance, but the two numbers must match in order for you to submit the budget.

<table>
<thead>
<tr>
<th>Total Grant Award</th>
<th>Currently Budgeted Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$75,000.00</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

9. For each line item, complete the fields in that line item’s section; each line item requires an explanation – see the yellow highlighted instructions at the top of the line item explaining what you should enter into the “Explanation” field. Using Telecommunications as an example:

<table>
<thead>
<tr>
<th>Telecommunications</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Telecommunications</td>
</tr>
<tr>
<td>Explanation</td>
</tr>
</tbody>
</table>

For line items that may have multiple entries (Salaries, Contractual Services, Equipment, Travel and Conferences, and Other), you may provide additional entries by clicking the Add...row button that appears below the line item (for example, to add more employees into the Salaries line item, you would click Add Salary Row)

<table>
<thead>
<tr>
<th>Salaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee First Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Explanation</th>
</tr>
</thead>
</table>

Add Salary row
10. Click a button at the top of the screen, as follows:

- **Save**: saves your work and allows you to come back later to complete; the item remains held by **you**
- **Save and Return**: saves your work, allows you to come back later to complete, and returns you to the previous screen; the item remains held by **you**
- **Submit**: submits the completed item and locks you from further changes until the City takes action; the item transfers to the **City**
- **Return**: returns you to the previous screen without saving any changes; the item remains held by **you**

**Negotiation Comments for Budget:**

With each response, you may include comments in the “Negotiation Comments” section of Budget. These comments can be viewed by your Grant Coordinator. You may also review comments entered by your Grant Coordinator. All comments will remain throughout the negotiation, but will not appear anywhere else in the system or in your final Grant Agreement.

![Negotiation Comments Table]

Your comments will be saved or submitted with the rest of your responses when you click the **Save** or **Submit** button. Remember, Total Grant Award and Currently Budgeted Amount entries must balance in order for you to **submit** the budget to the City for review.

**Viewing Previous Versions of the Budget Negotiation:**

During negotiations, as you go back and forth with your Grant Coordinator, you may find it helpful to view an earlier submitted version of Budget. To do so, click the header “**+ Version of this Form**” which will cause that section to expand.
You may click on any of the listed versions to view its information (you will be able to view only, not edit). The note “currently viewing” will appear after the item you have selected. To get back to the current version you are negotiating, you may click the one item listed under the “Current Version” section.

If you ever have any technical questions using this Grants Management System, please call Cityspan’s Help Desk toll-free at: 866-469-6884
(Monday through Friday, 8:00 AM – 5:00 PM, Pacific Time)

If you ever have any questions regarding project information, what to enter, submission deadlines, or any other administrative items, please contact your Grant Coordinator.
Agency Docs

Instead of photocopying and sending paper versions of required documentation, you may upload your Agency documents on the Agency Docs screen. For most of the types of documents, you may upload more than one version throughout the grant.

The Agency Docs Screen

The Document types are organized on the screen as follows:

**Organization Financial Documents**
- First Source
- Agency Global Budget
- Allocation Plan
- Lease (if ‘Yes’ to “Does one or more of your projects have space rental costs?”)
- Agency Funding Through CCSF (less than or greater than/equal to $250,000)

**Board Meetings Documents**
- Board Meetings File

**Board List Documents**
- Board Member List File

**Form 990**
- Form 990

**Audit**
(you will select Audit document type – OMB A-133, Standard, or No Audit)

**Certificates of Insurance**
- Lability Certificate
- Auto Certificate
- Workers Comp Certificate
- Property Certificate
Specific instructions for various document types are presented in yellow boxes just below the document type name. For example:

990
Prior Year IRS Form 990, Return of Organization Exempt From Income Tax, and Schedule A of Form 990, if prior year is not yet available, copy of Request for Extension (if applicable) and latest Form 990 available.

## Uploading and Deleting Documents

Before uploading or deleting documents, make sure your Agency Docs screen indicates the correct project year:

If you are not seeing the correct project year, then go to your projects list, select the year you want in the Project Year dropdown, then select Agency Docs.

### To upload a document:

1. After logging in, click **Agency Docs** in the left side menu
2. You will see the Agency Docs screen organized as described above
3. Click ‘upload file’ within the section your document is related (for example, if you are uploading your Agency Global Budget, then click ‘upload file’ underneath the section titled “Agency Global Budget”

### AGENCY DOCS

<table>
<thead>
<tr>
<th>Demo Agency 1</th>
<th>Save</th>
<th>Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Global Budget</td>
<td>Upload file</td>
<td></td>
</tr>
<tr>
<td>Allocation Plan</td>
<td>Upload file</td>
<td></td>
</tr>
</tbody>
</table>
4. The following popup window will appear:

![Popup Window](image)

5. Click **Choose File** then navigate to the file you want to upload and then select that file (files may not be larger than 20 MB).

6. Optionally, you may enter a description of the file.

7. When done, click **Upload**

8. Your file will appear (you will see the file name) along with a description if you entered one.

![Upload Example](image)

9. If there is a date field, then enter the date of the document being uploaded (for Insurance documents, you will enter the Expiration Date for each)

10. For Board Meetings and Board Members List, you will see **Add** buttons so you may upload more than one of that type of document (i.e., if you have changes during the grant term) – to do so, click the **Add** button, then follow the above steps

![Board Meetings Example](image)

11. Click a button at the top of the screen, as follows:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Save" /></td>
<td>saves your work and allows you to come back later to upload more documents</td>
</tr>
<tr>
<td><img src="image" alt="Submit" /></td>
<td>submits the completed set of Agency Docs (all required items must be included)</td>
</tr>
</tbody>
</table>
To delete or replace a document:
1. After logging in, click **Agency Docs** in the left side menu
2. You will see the Agency Docs screen
3. Click the **Delete File** button next to the file you want to delete or replace
4. In a popup window, you are asked if you are sure you want to delete the file:
   5. if yes, click **OK**
   6. if you do not want to delete the file, click **Cancel**

**Audit Documents**
For Audit documents, you must first select the type of Audit document you are uploading: OMB A-133, Standard Audit, No Audit Letter. Once you make your selection, the ‘upload file’ link will appear.

**Lease Documents**
The ‘upload file’ link within the “Lease” section will appear only if you answer ‘Yes’ to “Does one or more of your projects have space rental costs?”

**Certificates of Insurance**
In addition to uploading insurance certificates in this section, you will also enter the Expiration Date and Coverage Amount for each insurance type.
Printing and Signing Your Grant Agreement

Once Project Negotiation is complete and approved by a MOHCD Grant Coordinator, Fiscal Reviewer, and Manager, you may print and sign your Grant Agreement. You will receive an email with instructions to do so.

View/Print Your Grant Agreement

To view and print your Grant Agreement:
1. Click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click ‘**Grant Agreement**’
5. A PDF version of your Grant Agreement will appear or download, depending on your system settings; you may print and sign.

Budget Fund Source Allocation

After Project Negotiation is complete and approved by a MOHCD Grant Coordinator, Fiscal Reviewer, and Manager, the Budget Allocation tool will become available. Budget Allocation is where budgeted line item amounts get allocated among your project’s fund sources. You may make and save changes to your budget allocation, but only Grant Coordinators may submit the final version.

If your project is funded by only one fund source, then the allocation is done automatically by the system. If your project is funded by more than one fund source,
the system will allocate each line item amount proportionally among the fund sources. You may keep this as-is or make changes as long as each line item and fund source remains in balance. When ready, Grant Coordinators will submit complete Budget Allocations.

**View Your Project’s Budget Allocation**

<table>
<thead>
<tr>
<th>WORK PLAN</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Contact Information</td>
<td>Submitted</td>
</tr>
<tr>
<td>Narrative</td>
<td>ACCEPTED</td>
</tr>
<tr>
<td>Activities and Outcomes</td>
<td>ACCEPTED</td>
</tr>
<tr>
<td>Neighborhoods Served</td>
<td>ACCEPTED</td>
</tr>
<tr>
<td>Budget</td>
<td>ACCEPTED</td>
</tr>
<tr>
<td>Summary of Latest Version</td>
<td></td>
</tr>
<tr>
<td>Approvals</td>
<td>APPROVED</td>
</tr>
<tr>
<td>Grant Agreement</td>
<td></td>
</tr>
<tr>
<td><strong>Budget Allocation</strong></td>
<td>Not Submitted</td>
</tr>
</tbody>
</table>

**To view your project’s Budget Allocation:**

1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list

3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click ‘**Budget Allocation**’ (this will appear only after Project Negotiation is complete and fully approved)
For Projects Funded By Only One Fund Source

If your project is funded by only one fund source, then the allocation is done automatically by the system. Your Grant Coordinator will submit the allocation, so you may Report and Invoice. Clicking Return at the top returns you to the previous screen.

For Projects With More Than One Fund Source

If your project is funded by more than one fund source, the system will initially allocate each line item amount proportionally among the fund sources. You may keep this as-is or make changes as long as each line item and fund source remains in
balance. You may make and save changes to your budget allocation, but only Grant Coordinators may submit the final version.

**To change your project’s multi-fund source Budget Allocation:**
1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list

3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click ‘**Budget Allocation**’
5. You will see a screen showing each line item and line item detail set up and approved in negotiation; you will also see the addition of one column for each fund source used to fund the project.

6. Initially, when you view your project’s multi-fund source budget allocation, the system will have automatically entered amounts for each fund source for each line item proportional to the total fund source amount assigned to the project.
7. The first time you enter the Budget Allocation form, the Allocation Total (right-most column) will appear as 0 for each line item; click **Save** to update.
8. You may change the auto-calculated amounts by entering new amounts in the line item funds source fields you want to change. When doing so, upon saving, you must make sure all items remain in balance and all fields have a value - no blanks (if you are allocating no money anywhere, enter 0):

   No fields may be left blank – if you intend to zero out an amount within a particular line item fund source, then enter 0. If you leave a line item fund source field blank, then upon save, it will revert to its original value.
The sum of amounts allocated to each line item fund source (Allocation Total) must equal that line item’s Total Amount. If not, you will see an error, “Allocation Total does not equal Total Amount” as shown below:

The total amount assigned to each fund source may not exceed the total amount budgeted for that fund source for that project. If you over-budget a fund source, you will see an error similar to the following at the bottom of the screen:

9. If when you click Save there are no errors, your allocation is in balance. Your Grant Coordinator will submit the complete budget.

The Occasional Auto-Proportion Rounding Anomaly:
When the system auto-calculates proportionally among more than one fund source, on occasion, the total fund source amounts may be off by a penny or two. This is due to rounding. To solve, simply move 0.01 or 0.02 (or the total amount of the imbalance) from the over-balance fund source(s) to the under-balance fund source(s) within the same line item(s), then click Save.

Reporting and Invoicing
Once projects are completely set up and approved, including fund source allocations and final fiscal entries, you may submit your periodic reports and invoices. These include:

Executive Summary
Activities and Outcomes
Invoice
All three forms must be submitted (not just saved) in order for the month’s report becomes ready for Signatory level approval. A Signatory level user must approve before your grant coordinator can review.

Forms only in months that are current and prior and that have been approved are available for edit and submission (i.e., you will not have access to future months until they arrive or current/past months until they are approved).

While you may edit and submit Executive Summary and Activities and Outcomes forms in any month order, Invoices may be submitted in month order only (for each month, the Invoice has to be submitted and the entire month’s report has to be approved by a Signatory level user at your agency before the next month’s Invoice and entire report may be submitted and approved). The reason for these rules is to make sure balances always remain accurate.

If you have nothing to report for a particular month (i.e., you report quarterly instead of monthly) the system still requires each month to be submitted and approved – you may submit with a $0 invoice.

**Executive Summary**

**To view or report your Executive Summary:**

1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click **Reporting** in the left side menu
5. You will see sets of reporting items for each month of your grant term
6. Within the month you want to report, click **Executive Summary**
7. Executive Summary questions will appear. Questions are different depending on your project’s program.

![Executive Summary Example]

8. Answer each item (those with a red left border are required)
9. Click a button at the top of the screen, as follows:

- **Save** saves your work and allows you to come back later to complete
- **Save and Return** saves your work, allows you to come back later to complete, and returns you to the previous screen
- **Submit** submits the completed item and locks you from further changes (your Grant Coordinator may unlock if you need to make corrections)
- **Return** returns you to the previous screen without saving any changes

**Activities and Outcomes**

To view or report your Activities and Outcomes:
1. After logging in, click **Agency Projects** in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list

![Projects Example]

3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click **Reporting** in the left side menu
5. You will see sets of reporting items for each month of your grant term
6. Within the month you want to report, click ‘**Activities and Outcomes**’
7. The Activities and Outcomes form will appear. Client Activities are listed at the top of this form. Client Activities are read-only and are based on the clients you have enrolled for activities and outcomes through the Client Activities tab.

The form provides a count of new clients enrolled this month, along with the total Year-To-Date (YTD) count and the percent of annual goal completed year-to-date. This information is provided first for total unduplicated clients served, and then for each activity and outcome.

Please review this information for accuracy. If it does not appear that all clients enrolled have been counted, please return to the Client Activities left menu tab and review the enrollment information for each activity and add any missing clients before submitting this form.

8. For Non-Client Activities, you will use this form to report your monthly deliverables. Each month in the “Month # or Completion Date” field please enter either a) the number achieved during the reporting month, if the Non-Client Activity has a number goal, or b) the completion date if the goal is a date by which this activity will be completed.

9. Click a button at the top of the screen, as follows:

- **Save** saves your work and allows you to come back later to complete
- **Save and Return** saves your work, allows you to come back later to complete, and returns you to the previous screen
- **Submit** submits the completed item and locks you from further changes (your Grant Coordinator may unlock if you need to make corrections)
- **Return** returns you to the previous screen without saving any changes
Invoicing (Non-Capital Projects)

To view or report your NON-CAPITAL PROJECT Invoice:

1. After logging in, click **Agency Projects** in the left side menu.
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list.
3. Click on the project you want to view; you will be taken to Project Documents.
4. Click **Reporting** in the left side menu.
5. You will see sets of reporting items for each month of your grant term.
6. Within the month you want to report, click ‘**Invoice**’.
7. The Invoice grid will appear. You will see total balances at the top followed by each line item with a line for each detail (i.e., the Salary line item has a line for each employee). You will also see entry fields under each fund source used for your project – this is where you will enter your request amounts.

---

**The top of the invoice form shows current totals**

**Below the current totals, the year-to-date summaries appear for fund sources and for each line item by fund source.**
For each main line item, the system shows each sub item description and total original budget for the project and for each fund source.

For each main line item, the system provides fields for you to enter request amounts by fund source; also shown are year-to-date request amounts for each fund source.

8. Enter reimbursement request amounts in fields in the fund source column(s). For Salaries, first enter the “Invoice Total” for each employee, then, in the “Salary Total” section, enter how much of the Salaries total should be applied to each fund source.

Enter the selected month’s Invoice Total for each employee listed under Salaries (if 0, enter 0)
9. Click a button at the top of the screen, as follows:

- **Save** saves your work and allows you to come back later to complete
- **Save and Return** saves your work, allows you to come back later to complete, and returns you to the previous screen
- **Submit** submits the completed item and locks you from further changes (your Grant Coordinator may unlock if you need to make corrections)
- **Return** returns you to the previous screen without saving any changes

To Add Employees to the Salary Line Item Details (on Un-Submitted Invoices Only):

1. Click **Add Salary (person)**
2. Complete all the fields (Employee First Name, Employee Last Name, Employee Title, Hourly Rate, Explanation, and the Invoice Total for the selected month
3. To add more employees, click the **Add Salary (person)** button again for each
4. Save your entries by clicking the **Save**, **Save and Return**, or **Submit** button (remember to complete the rest of your invoice entries before you submit)

To Delete Employees from Salary Line Item Details (on Un-Submitted Invoices Only):

1. Click **Add Salary (person)**
2. Click the **Delete** button that appears next to the employee(s) you want to delete
3. A message will appear asking if you are sure you want to delete – if so, click **OK**; if not, click **Cancel** (once you click **OK**, the deletion will be immediate, so be careful)

To Edit Employee Information (on Un-Submitted Invoices Only):

1. Click right into the field you want to edit
2. Enter the new information
3. Save your entries by clicking the **Save**, **Save and Return**, or **Submit** button (remember to complete the rest of your invoice entries before you submit)
Invoicing (Capital Projects)

To view or report your CAPITAL PROJECT Invoice:
1. After logging in, click Agency Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click Reporting in the left side menu
5. You will see sets of reporting items for each month of your grant term
6. Within the month you want to report, click ‘Invoice’
7. The Invoice grid will appear. You will see total balances at the top followed by Benefiting Programs information as originally set up. Lastly, you will see each reimbursement item you set up for your capital project. You will also see entry fields under each fund source used for your project – this is where you will enter your request amounts.
For each reimbursement item, the system provides fields for you to enter request amounts by fund source; also shown are the item total request amount for each invoice.

8. Enter reimbursement request amounts in fields in the fund source column(s).
9. Click a button at the top of the screen, as follows:

- **Save**: saves your work and allows you to come back later to complete.
- **Save and Return**: saves your work, allows you to come back later to complete, and returns you to the previous screen.
- **Submit**: submits the completed item and locks you from further changes (your Grant Coordinator may unlock if you need to make corrections).
- **Return**: returns you to the previous screen without saving any changes.

**Reviewing Your Entries**

To view all saved or submitted entries in one place:
1. After logging in, click **Agency Projects** in the left side menu.
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list.

3. Click on the project you want to view; you will be taken to the Project Documents screen.
4. Click **Reporting** in the left side menu.
5. You will see sets of reporting items for each month of your grant term.
6. Within the month you want to view information, click ‘Report & Invoice Totals’.
7. A pdf showing all current entries for all reporting items (Executive Summary, Activities and Outcomes, and Invoice) will appear.
Approving and Submitting

When all information has been entered into your report and all the forms (Executive Summary, Activities and Outcomes, and Invoice) have been submitted, a Signatory level user at your agency must provide final approval for the whole submission before your reimbursement request can be processed.

To provide final approval and submit a month’s reporting and invoice:
1. After logging in, click Agency Projects in the left side menu
2. You will see a list of your agency’s projects for the current grant year – to see projects from a different grant year, select the year from the fiscal year list
3. Click on the project you want to view; you will be taken to the Project Documents screen
4. Click Reporting in the left side menu
5. You will see sets of reporting items for each month of your grant term only for those months that have already arrived
6. Within the month you want to review and approve, review items one by one by clicking on each item to see what was submitted, or review all at once by clicking ‘Report & Invoice Details’ (if corrections are needed, your Grant Coordinator may unlock the form(s) for you)
7. Within the month you want to report, click ‘Approval’ (this must be done in month order)
8. Click Submit Reporting and Invoice
9. Your Grant Coordinator will receive notification of your submission and process accordingly
Budget Revisions

Budget Revisions are adjustments to the balances left among your budget’s line items. They are subject to policy and regulations.

Before any Budget Revision, Keep Aware:

No other budget revisions or administrative adjustments may be pending (not yet final approved by City fiscal team members). No monthly report that has one or more submitted forms may be pending (not yet final approved by a MOHCD or OEWD manager).

Once a budget revision is initiated, all users will be locked out from viewing and updating monthly reporting forms. Monthly reporting will remain inaccessible until the budget revision gets final City fiscal approval or is cancelled.

Invoices for all reporting months up to the budget revision month must be submitted (for months for which there are no reimbursements, be sure the invoice is completely zeroed out). This must be done to keep balances accurate.

Initiating a Budget Revision

Only City personnel may initiate a budget revision in GMS. Please make your budget revision request directly to your Grant Coordinator.

Once a budget revision is initiated, all Signatory level users at your agency will receive email notification.

The Budget Revision GMS Form Layout

You may view past and pending budget revisions by clicking Budget Revision in the left side menu. After a budget revision is initiated, a new budget revision section is added to the page. You will see 5 forms listed:

- Funding Sources
- Budget
- Budget Allocation
Fiscal Setup
Revision Approval

Also shown is the Budget Revision Effective Date.

![Budget Revision Form]

Funding Sources and Fiscal Setup are accessible for viewing information only, but as indicated by the green **Submitted** status, they are not editable. These items are never changed for budget revisions.

In order, you and your GC will work on Budget, followed by Budget Allocation, followed by Revision Approval.

You may cancel and undo all settings for a budget revision by clicking the **Delete** button above the forms. This will remove all entries made into the deleted set of forms and make your normal monthly reporting once again accessible.

In addition, you will see a set of forms (Funding Sources, Budget, Budget Allocation, and Fiscal Setup) in a read-only state before the first budget revision or below existing revisions. These forms show the initial setup for your reference.

**Budget Revision: The Budget Form**

It may make the process simpler if you use a spreadsheet showing line items and new balances based on budget revision changes. There is a pre-set “Budget Revision Worksheet” you may obtain by scrolling to the bottom of any budget revision **Budget** form.

**Entering budget revision changes on the Budget form:**
1. After logging in, select the project for which you requested a budget revision
2. Click **Budget Revision** in the left side menu
3. You will see the main Budget Revision screen, including a new budget revision if initiated by the City
4. Click **Budget**
5. The editable Budget form appears with several sections: Explanation for all proposed changes, Revision Effective Date, Line Item Selection, Total Amounts, Year-to-Date Summary, and each line item available for budget revision changes.

6. Enter the explanation for all changes taking place in this budget revision and save your work by clicking **Save**

![Budget Form](image)

7. Notice the effective date of the revision

![Revision Effective Date](image)

8. Line items existing in your current budget will appear with a checked box; you may uncheck (no longer use) a line item by clicking the checked box – this is possible only for those line items for which no reimbursement request has yet been made; you may add line items by clicking empty boxes (the new line items will appear below)

![Line Item Selection](image)

9. Notice the total grant and currently budgeted amounts. The currently budgeted amount will change according to your line item amount entries (upon clicking **Save**); in order to submit your changes, the two numbers must be the same.

![Total Grant and Currently Budgeted Amount](image)

10. The Year-to-Date summary shows budget and balance information for each line items used in the last approved budget.

![Year-to-Date Summary](image)
11. The line items appear next
   If changing Salaries: enter new values in the “Total Amount” fields. The Salary Total will update when you Save or Submit. You may delete or add employees by clicking the corresponding Delete or Add Salary Row button.
   If changing Fringe Benefits: enter new values in the “Total Amount” field for each benefit type being changed.
   If changing any other line item: enter new values in the “Total Amount” fields. For line items that have a breakdown of sub line items (i.e., Travel and Conferences, Equipment, etc.), you must enter values for each sub item. Further, you may delete or add new sub line items by clicking the corresponding Delete or Add Row button (you may not delete any item that has invoicing against it).

12. When you have completed the budget revision changes, click Save and check that the “Total Grant Award” and “Currently Budgeted Amount” are the same – if they are not, then adjust your values until they are (you will not be able to submit the budget revision if these two numbers are out of balance).

13. When your revisions are complete and in balance, click Submit then click OK in the popup window (click Cancel to go back to make changes).

14. You will be taken back to the Budget Revisions forms page, where the Budget form will show a status of Submitted.

15. Next, you will work on the Budget Allocation form

   **Budget Revision: The Budget Allocation Form**

   If your budget uses only one fund source, then the budget allocation will be handled automatically – you need only submit the form. If, however, your budget uses more than one fund source, each line item amount has to be allocated among each fund source.

   **Entering budget revision changes on the Budget Allocation form:**
   1. After logging in, select the project for which you requested a budget revision
   2. Click Budget Revision in the left side menu
   3. You will see the main Budget Revision screen with the current budget revision appearing at the top
   4. Click Budget Allocation
   5. The editable Budget Allocation form appears with the following sections:
      - Revision Effective Date, Total Amounts, Year-to-Date Summary by Line Item,
      - each line item detail for which to enter values by fund source, Year-to-Date Summary for each Fund Source for each Line Item, downloadable “Budget Revision Worksheet” and “Export to Excel” Spreadsheets, and Balances for each Fund Source by Line Item
6. For all line item details, except those under Contractual Services, the actual allocation among fund sources is flexible – the only rules are the detailed fund source amounts must sum up to the new line item amount you entered on the Budget form and no fund source amount may go lower or higher than its current balance.

7. If the budget uses only one fund source, click **Submit** and you are done with the budget allocation.

8. If the budget uses more than one fund source, the easiest way to figure out the values for each fund source is to download the “Budget Revision Worksheet” and “Export to Excel” spreadsheets. “Export to Excel” provides line item Previous Budget and YTD Balance for each of the budget’s fund sources.

9. By fund source, copy the currency values for each line item (both Previous Budget and YTD Balance); then, paste the values in the “Budget Revision Worksheet” under the “Original Annual Budget” and “Balance as of” columns (be sure to select the correct Budget Revision Worksheet tab to match the number of fund sources used in the budget.

10. Next, on the Budget Revision Worksheet, enter the Proposed Change for the fund source for each line item (you may not enter more than the original total fund source amount or subtract more than the line item balance). If the Proposed Change amount within a fund source for a line item covers the entire line item value change, then you are done with that fund source. If not, continue with the Proposed Change balance on the next fund source. In other words, if you are able to make all proposed changes within one fund source, that will make the process much simpler.

11. Once your entries are complete, you may use the Proposed Change amounts for each fund source / line item to enter into the GMS Budget Allocation form. Your goal is to get the “Target Allocation Amount” and “Current Allocation Total” for each line item detail to match.

12. When done with the Budget Allocation form, click **Submit**

**Budget Revision: Revision Approval**

After the **Budget** and **Budget Allocation** forms are submitted, the last set of steps are for grantee and City approvals. When the approvals are all done, the budget revision is complete, and all monthly reporting forms become viewable showing the new balances for each line item.

**Approving a Budget Revision:**

1. Once all budget revision forms are submitted, a Signatory level user may click **Revision Approval**
2. Under “Agency Signatory,” click Approve (if corrections need to be made, before clicking Approve, you may re-open Budget Allocation and Budget by clicking Unlock at the top of each form – if only the Budget Allocation form needs corrections, then you need unlock only that form; if, however, the Budget form needs correction, then you must unlock both forms)

3. After your Signatory approval, MOHCD or OEWD staff will review and approve the budget revision (if any corrections are needed, staff may reject the budget revision, which unlocks all forms)

Project Amendments

Project Amendments are adjustments to the workplan items of your project (Activities and Outcomes, Narratives, and Neighborhoods Served).

Initiating a Project Amendment

Only City personnel may initiate a project amendment in GMS. Please make your project amendment request directly to your Grant Coordinator.

Once a budget revision is initiated,

Client Setup: One-by-One

Client information must be entered into the system in order for you to get credit towards serving those clients under one or more of your activities. Further, client information is required for reporting purposes.

There are two ways to enter clients into the system: 1) one-by-one using the “Clients” screens or 2) multiple clients at once using the upload feature. The one-by-one methods are described below for each client type (people clients, business clients, and non-profit clients). The upload method is described in its own section.

For one-by-one setup, you will use the appropriate tab(s) as shown in the screenshot below to set up each kind of client.
Enter/Edit People Clients One-by-One

To enter people clients one-by-one:
1. After logging in, click **Clients** in the left side menu
2. You will see the main “Clients” screen with search functionality
3. To start entering a person client, click the ‘Add People’ tab.
4. Enter information; all fields with a red asterisk are required
5. The “Upload ID” field requires a unique ID number for each of your client records. This is used for the system to be able to match existing clients in case you ever use the upload feature to upload multiple clients at once. You may enter your own unique number, or click Auto Generate for the system to generate a unique number for you.
6. Click a button at the top or bottom of the screen, as follows:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Record</td>
<td>saves the client record with the information you entered or updated</td>
</tr>
<tr>
<td>Cancel</td>
<td>cancels any changes made to the client record</td>
</tr>
</tbody>
</table>

**Workforce Development Clients**

If the client you are entering will be involved with any Workforce Development projects, then after adding the client record, please complete the information under the ‘Workforce Development,’ ‘Training,’ and ‘Placement’ tabs. Click Save to save your entries.

**Enter/Edit Business Clients One-by-One**

Business client records have three parts: 1) information about the business; 2) information about the businesses’ principal(s); and 3) information about each employee. Once a business is added, you may add as many principals and employees to that business as needed.

**To enter business clients one-by-one:**
1. After logging in, click Clients in the left side menu
2. You will see the main “Clients” screen with search functionality
3. To start entering a business client, click the ‘Add Business’ tab.
4. Enter information; all fields with a red asterisk are required
5. The “Upload ID” field requires a unique ID number for each of your client records. This is used to match clients in case you ever use the upload feature to upload multiple clients at once. You may enter your own unique number, or click Auto Generate for the system to generate a unique number for you.

6. Click a button at the top or bottom of the screen, as follows:

```
Add Record  saves the client record with the information you entered or updated
Cancel       cancels any changes made to the client record
```

To enter business principals one-by-one:

**The business with which principals are associated must be set up first.**

1. After logging in, click **Clients** in the left side menu
2. You will see the main “Clients” screen with search functionality
3. To start entering a business principal, click the ‘Add Principal’ tab
4. Enter information; all fields with a red asterisk are required
5. Make sure you select the correct business name in the Business drop down field
6. The “Upload ID” field requires a unique ID number for each of your client records. This is used to match clients in case you ever use the upload feature to upload multiple clients at once. You may enter your own unique number, or click Auto Generate for the system to generate a unique number for you.

7. Click a button at the top or bottom of the screen, as follows:
   - **Add Record**: saves the client record with the information you entered or updated
   - **Cancel**: cancels any changes made to the client record

**To enter business employees one-by-one:**

**The business with which employees are associated must be set up first.**

1. After logging in, click **Clients** in the left side menu
2. You will see the main “Clients” screen with search functionality
3. To start entering a business principal, click the ‘**Add Employee**’ tab
4. Enter information; all fields with a red asterisk are required
5. Make sure you select the correct business name in the Business drop down field
6. The “Upload ID” field requires a unique ID number for each of your client records. This is used to match clients in case you ever use the upload feature to upload multiple clients at once. You may enter your own unique number, or click Auto Generate for the system to generate a unique number for you.

7. Click a button at the top or bottom of the screen, as follows:
   - **Add Record** saves the client record with the information you entered or updated
   - **Cancel** cancels any changes made to the client record

**Enter/Edit Business Loan Information**

Business clients may receive loans, and for each loan funded, must report:
- Loan Amount
- Lender Organization Type and Name
- Terms of Loan (interest rate, use of loan, term)
Number of Jobs Created and/or Retained as a Result of the Loan
Date Funded

To enter funded loan information for a business:
1. After logging in, click Clients in the left side menu
2. You will see the main “Clients” screen with search functionality
3. Search for and click on the name of the business
4. Click the ‘Loans’ tab
5. Enter funded loan information in the fields provided
6. Click Save
7. If you need to enter information for more than one loan, click **Click here to add Loan** and repeat the above

**Enter/Edit Non-Profit Clients One-by-One**

To enter non-profit clients one-by-one:
1. After logging in, click **Clients** in the left side menu
2. You will see the main “Clients” screen with search functionality
3. To start entering a non-profit client, click the ‘Add Non-Profit’ tab
4. Enter the name of the Organization
5. Click a button at the top or bottom of the screen, as follows:
   - **Add Record** saves the client record with the information you entered or updated
   - **Cancel** cancels any changes made to the client record

To enter non-profit organization attendee names:
1. After logging in, click **Clients** in the left side menu
2. You will see the main “Clients” screen with search functionality
3. Search for the non-profit for which you want to add attendees
4. Select the non-profit name to view its details
5. Click ‘**Click here to add Attendees**’
6. Enter Attendee first name, last name, and/or title
7. Click Save

**Search / View Clients**

To search for and view client information:
1. After logging in, click Clients in the left side menu
2. You will see the main “Clients” screen with search functionality; you may view clients by client type, first initial of last name, or search by name:

![Client Search Menu](image)

To view a list of clients by type, select a type in the “View by Type” section. A list of clients within that type will appear. You may search by initial from this screen by clicking a letter at the top of the screen. Click ‘All’ to view the entire list.

![Client Types](image)

To view a list of clients by last name initial, click the first letter of the last name in which you are interested in the “View by Last Name Initial” section. A list of clients whose last name begins with the selected letter will appear. You may select a different last name initial right from the top of the screen. Click ‘All’ to view the entire list.

![Last Name Initials](image)
To find a client by name, within the “Search” section, enter all or part of the client’s first and/or last name or client ID, then click the Find Client button. If there is a record of any client whose name includes your search parameters, that client’s name will appear. For business and non-profit clients, use the “Last Name or Client ID” field. You may search by initial from this screen by clicking a letter at the top of the screen. Click ‘All’ to view the entire list.

3. When you see the client name(s) appear, you may click on a name to view or edit that client’s details.

Client Setup: Upload Multiple Clients at Once

Using the system’s upload feature, you may upload records for multiple clients all at once. In order to do so, you must use the spreadsheet templates available from the GMS upload window.

Further, the type of data that gets entered into each cell must match the type of data that cell requires (for example, if the field is a date, then a date must be entered). If any records contain invalid or improperly formatted data, those records will not be uploaded (a message will indicate there were invalid records, and a downloadable spreadsheet will list these records for you).
There are four main steps to uploading multiple clients (see below for details):

1) Complete and save the records template
2) Select the saved template
3) Select the client type
4) Upload

**Working with Records Templates**

A records template is a pre-made Excel spreadsheet that contains the necessary fields for your upload. In GMS, there are four templates – one for clients who are people and three for clients who are businesses (business info, principal info, and employee info). You may obtain any of these templates from the Data Upload Tool window.

**How to Use Records Templates**

The first sheet of the template, called “Clients,” contains the fields that apply to the type of client you are uploading along with a sample row (be sure to delete the sample row prior to uploading). Required items are **bold** and **highlighted yellow**.

The second sheet of the template is the data dictionary. This describes what kind of data may be used in each field and whether or not the field is required. The information includes:

- **Field Required?** (“Yes” indicates a required field)
- **Column Header** (the system name for each field that appears on the upload sheet)
- **Label** (the name of the field on GMS screens)
- **Field Type** (what kind of data may be entered, i.e., date, numbers, etc.)
- **Value Options** (for dropdown or radio button fields, only listed items may be used)

A unique characteristic of uploading multiple clients at once is the necessity for an **Upload ID** for each client record. You may use your own Upload ID made up of numbers and/or letters – each and every client record’s Upload ID must be unique.

If your upload list contains records that have previously been uploaded, those records must contain their original Upload ID’s or you will be at risk of creating duplicate client records. You may check a client record’s Upload ID by viewing the “Upload ID” field at the bottom of that client’s record screen.
### People Client Upload Template Entries

The people client fields that appear as columns on the people client upload template are as follows (this includes what you may enter, an example, and whether or not the field is required):

<table>
<thead>
<tr>
<th>Field / Column Name</th>
<th>What to Enter</th>
<th>Example</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>UploadID</td>
<td>Unique combination of letters and/or numbers, or the Upload ID already present in the client’s record if already existing</td>
<td>aa12345</td>
<td>Y</td>
</tr>
<tr>
<td>FirstName</td>
<td>Client’s first name</td>
<td>Pete</td>
<td>N</td>
</tr>
<tr>
<td>LastName</td>
<td>Client’s last name or ID (ID is used by some agencies who need to keep client identifications confidential)</td>
<td>Zapai or 551278</td>
<td>Y</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>Client’s address number, street name, and street type</td>
<td>123 Main Street</td>
<td>Y</td>
</tr>
<tr>
<td>UnitNumber</td>
<td>Client’s unit number, if any</td>
<td>3D</td>
<td>N</td>
</tr>
<tr>
<td>City</td>
<td>Client’s city</td>
<td>San Francisco</td>
<td>Y</td>
</tr>
<tr>
<td>Zip</td>
<td>Client’s zip code</td>
<td>94123</td>
<td>Y</td>
</tr>
<tr>
<td>Phone</td>
<td>Client’s phone number</td>
<td>415-555-1212</td>
<td>N</td>
</tr>
<tr>
<td>Email</td>
<td>Client’s email address, if any</td>
<td><a href="mailto:pete@email.com">pete@email.com</a></td>
<td>N</td>
</tr>
<tr>
<td>Birthdate</td>
<td>Client’s birthdate</td>
<td>3/2/1965</td>
<td>Y</td>
</tr>
<tr>
<td>Gender</td>
<td>Must use a selection listed as a value option for “Gender” in the data dictionary</td>
<td>Male</td>
<td>Y</td>
</tr>
<tr>
<td>IsGayLesbianBisexual</td>
<td>Y or N (do not use “Yes” or “No”)</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>IsHispanic</td>
<td>Y or N (do not use “Yes” or “No”)</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Race</td>
<td>Must use a selection listed as a value option for “Race” in the data dictionary</td>
<td>American Indian/Alaskan Native</td>
<td>Y</td>
</tr>
<tr>
<td>CulturalAffiliation</td>
<td>Client’s cultural affiliation or nationality</td>
<td>Italian</td>
<td>N</td>
</tr>
<tr>
<td>PrimaryLanguage</td>
<td>Must use a selection listed as a value option for “Primary Language” in the data dictionary</td>
<td>Italian</td>
<td>N</td>
</tr>
<tr>
<td>SecondaryLanguage</td>
<td>Must use a selection listed as a value option for “Primary Language” in the data dictionary</td>
<td>English</td>
<td>N</td>
</tr>
<tr>
<td>FamilyMemberCount</td>
<td>Number (1 – 10) indicating how many client family members live at the client’s home address</td>
<td>3</td>
<td>Y</td>
</tr>
<tr>
<td>FamilyIncome</td>
<td>Total annual income of all family members at client’s home address (no $)</td>
<td>32000</td>
<td>Y</td>
</tr>
<tr>
<td>Field / Column Name</td>
<td>What to Enter</td>
<td>Example</td>
<td>Required?</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------</td>
<td>---------</td>
<td>-----------</td>
</tr>
<tr>
<td>BusinessUploadID</td>
<td>Unique combination of letters and/or numbers, or the Upload ID already present in the client’s record if already existing</td>
<td>aa12345</td>
<td>Y</td>
</tr>
<tr>
<td>BusinessName</td>
<td>Business name</td>
<td>ABC, Inc.</td>
<td>Y</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>Business address number, street name, and street type</td>
<td>123 Main Street</td>
<td>Y</td>
</tr>
<tr>
<td><em>UNITNUMBER</em></td>
<td>Business unit number, if any</td>
<td>300</td>
<td>N</td>
</tr>
<tr>
<td>City</td>
<td>Business city</td>
<td>San Francisco</td>
<td>Y</td>
</tr>
<tr>
<td>Zip</td>
<td>Business zip code</td>
<td>94123</td>
<td>Y</td>
</tr>
<tr>
<td>Phone</td>
<td>Business phone number</td>
<td>415-555-1212</td>
<td>Y</td>
</tr>
<tr>
<td>YearInBusiness</td>
<td>First year in business (if Pre-Startup, enter 0)</td>
<td>2008</td>
<td>Y</td>
</tr>
<tr>
<td>BusinessStatus</td>
<td>Must use a selection listed as a value option for “Status” in the data dictionary</td>
<td>Existing - Expanding</td>
<td>Y</td>
</tr>
<tr>
<td>LegalStructure</td>
<td>Must use a selection listed as a value option for “Gender” in the data dictionary</td>
<td>Male</td>
<td>N</td>
</tr>
<tr>
<td>OfferHealthBenefits</td>
<td>Yes or No</td>
<td>Yes</td>
<td>N</td>
</tr>
<tr>
<td>DunsNumber</td>
<td>Business DUNS number</td>
<td>12-345-6789</td>
<td>N</td>
</tr>
<tr>
<td>HasLease</td>
<td>Yes or No</td>
<td>Yes</td>
<td>Y</td>
</tr>
<tr>
<td>MonthsRemaining</td>
<td>Number of months remaining on lease (required if the answer to Has Lease is Yes)</td>
<td>20</td>
<td>Y (if Has Lease? is Yes)</td>
</tr>
</tbody>
</table>

**Business Client Upload Template Entries**
The business client fields that appear as columns on the business client upload template are as follows (this includes what you may enter, an example, and whether or not the field is required):

<table>
<thead>
<tr>
<th>Field / Column Name</th>
<th>What to Enter</th>
<th>Example</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>BusinessUploadID</td>
<td>Unique combination of letters and/or numbers, or the Upload ID already present in the client’s record if already existing</td>
<td>aa12345</td>
<td>Y</td>
</tr>
<tr>
<td>BusinessName</td>
<td>Business name</td>
<td>ABC, Inc.</td>
<td>Y</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>Business address number, street name, and street type</td>
<td>123 Main Street</td>
<td>Y</td>
</tr>
<tr>
<td>UNITNUMBER_</td>
<td>Business unit number, if any</td>
<td>300</td>
<td>N</td>
</tr>
<tr>
<td>City</td>
<td>Business city</td>
<td>San Francisco</td>
<td>Y</td>
</tr>
<tr>
<td>Zip</td>
<td>Business zip code</td>
<td>94123</td>
<td>Y</td>
</tr>
<tr>
<td>Phone</td>
<td>Business phone number</td>
<td>415-555-1212</td>
<td>Y</td>
</tr>
<tr>
<td>YearInBusiness</td>
<td>First year in business (if Pre-Startup, enter 0)</td>
<td>2008</td>
<td>Y</td>
</tr>
<tr>
<td>BusinessStatus</td>
<td>Must use a selection listed as a value option for “Status” in the data dictionary</td>
<td>Existing - Expanding</td>
<td>Y</td>
</tr>
<tr>
<td>LegalStructure</td>
<td>Must use a selection listed as a value option for “Gender” in the data dictionary</td>
<td>Male</td>
<td>N</td>
</tr>
<tr>
<td>OfferHealthBenefits</td>
<td>Yes or No</td>
<td>Yes</td>
<td>N</td>
</tr>
<tr>
<td>DunsNumber</td>
<td>Business DUNS number</td>
<td>12-345-6789</td>
<td>N</td>
</tr>
<tr>
<td>HasLease</td>
<td>Yes or No</td>
<td>Yes</td>
<td>Y</td>
</tr>
<tr>
<td>MonthsRemaining</td>
<td>Number of months remaining on lease (required if the answer to Has Lease is Yes)</td>
<td>20</td>
<td>Y (if Has Lease? is Yes)</td>
</tr>
</tbody>
</table>

**Business - Principal Upload Template Entries**
The business-principal fields that appear as columns on the business-principal upload template are as follows (this includes what you may enter, an example, and whether or not the field is required):

<table>
<thead>
<tr>
<th>Field / Column Name</th>
<th>What to Enter</th>
<th>Example</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>BusinessUploadID</td>
<td>Upload ID number of the business with which this principal is associated</td>
<td>a1236</td>
<td>Y</td>
</tr>
<tr>
<td>Field / Column Name</td>
<td>What to Enter</td>
<td>Example</td>
<td>Required?</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------</td>
<td>---------</td>
<td>-----------</td>
</tr>
<tr>
<td>PrincipalID</td>
<td>Unique combination of letters and/or numbers, or the Principal ID already present in the client’s record if already existing</td>
<td>aa12345</td>
<td>Y</td>
</tr>
<tr>
<td>FirstName</td>
<td>Principal’s first name</td>
<td>Pete</td>
<td>N</td>
</tr>
<tr>
<td>LastName</td>
<td>Principal’s last name</td>
<td>Zapai</td>
<td>Y</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>Principal’s address number, street name, and street type</td>
<td>123 Main Street</td>
<td>Y</td>
</tr>
<tr>
<td>UnitNumber</td>
<td>Principal’s unit number, if any</td>
<td>3D</td>
<td>N</td>
</tr>
<tr>
<td>City</td>
<td>Principal’s city</td>
<td>San Francisco</td>
<td>Y</td>
</tr>
<tr>
<td>State</td>
<td>Principal’s state</td>
<td>CA</td>
<td>Y</td>
</tr>
<tr>
<td>Zip</td>
<td>Principal’s zip code</td>
<td>94123</td>
<td>Y</td>
</tr>
<tr>
<td>Phone</td>
<td>Principal’s phone number</td>
<td>415-555-1212</td>
<td>Y</td>
</tr>
<tr>
<td>Email</td>
<td>Principal’s email address</td>
<td><a href="mailto:pete@email.com">pete@email.com</a></td>
<td>Y</td>
</tr>
<tr>
<td>IsHispanic</td>
<td>Yes or No</td>
<td>No</td>
<td>Y</td>
</tr>
<tr>
<td>Race</td>
<td>Must use a selection listed as a value option for “Race” in the data dictionary</td>
<td>American Indian/Alaskan Native</td>
<td>Y</td>
</tr>
<tr>
<td>CulturalAffiliation</td>
<td>Client’s cultural affiliation or nationality</td>
<td>Italian</td>
<td>N</td>
</tr>
<tr>
<td>PrimaryLanguage</td>
<td>Must use a selection listed as a value option for “Primary Language” in the data dictionary</td>
<td>Italian</td>
<td>Y</td>
</tr>
<tr>
<td>SecondaryLanguage</td>
<td>Must use a selection listed as a value option for “Primary Language” in the data dictionary</td>
<td>English</td>
<td>N</td>
</tr>
<tr>
<td>FamilyMemberCount</td>
<td>Number (1 – 10) indicating how many client family members live at the client’s home address</td>
<td>3</td>
<td>N</td>
</tr>
<tr>
<td>FamilyIncome</td>
<td>Total annual income of all family members at client’s home address (no $)</td>
<td>32000</td>
<td>N</td>
</tr>
<tr>
<td>FamilyHead</td>
<td>Must use a selection listed as a value option for “Family Head” in the data dictionary</td>
<td>Dual Headed Family</td>
<td>N</td>
</tr>
</tbody>
</table>

**Business - Employee Upload Template Entries**

The business-employee fields that appear as columns on the business-employee upload template are as follows (this includes what you may enter, an example, and whether or not the field is required):

<table>
<thead>
<tr>
<th>Field / Column Name</th>
<th>What to Enter</th>
<th>Example</th>
<th>Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>BusinessUploadID</td>
<td>Upload ID number of the business with which this employee is associated</td>
<td>a1236</td>
<td>Y</td>
</tr>
<tr>
<td>EmployeeID</td>
<td>Unique combination of letters and/or numbers, or the Employee ID already present in</td>
<td>aa12345</td>
<td>Y</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Value</td>
<td>Type</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------</td>
<td>------</td>
</tr>
<tr>
<td>FirstName</td>
<td>Employee's first name</td>
<td>Pete</td>
<td>N</td>
</tr>
<tr>
<td>LastName</td>
<td>Employee's last name</td>
<td>Zapai</td>
<td>Y</td>
</tr>
<tr>
<td>Title</td>
<td>Employee's job title</td>
<td>Admin Assistant</td>
<td>N</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>Employee's address number, street name, and street type</td>
<td>123 Main Street</td>
<td>Y</td>
</tr>
<tr>
<td>UnitNumber</td>
<td>Employee's unit number, if any</td>
<td>3D</td>
<td>N</td>
</tr>
<tr>
<td>City</td>
<td>Employee's city</td>
<td>San Francisco</td>
<td>Y</td>
</tr>
<tr>
<td>State</td>
<td>Employee's state</td>
<td>CA</td>
<td>Y</td>
</tr>
<tr>
<td>Zip</td>
<td>Employee’s zip code</td>
<td>94123</td>
<td>Y</td>
</tr>
<tr>
<td>Phone</td>
<td>Employee’s phone number</td>
<td>415-555-1212</td>
<td>N</td>
</tr>
<tr>
<td>IsHispanic</td>
<td>Y or N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Race</td>
<td>Must use a selection listed as a value option for “Race” in the data dictionary</td>
<td>American Indian/Alaskan Native</td>
<td>Y</td>
</tr>
<tr>
<td>StartDate</td>
<td>Employee’s start date</td>
<td>2/2/2014</td>
<td>Y</td>
</tr>
<tr>
<td>HourlyRate</td>
<td>Employee’s hourly rate (no $)</td>
<td>21.25</td>
<td>Y</td>
</tr>
<tr>
<td>HoursPerWeek</td>
<td>Employee’s hours per week</td>
<td>35</td>
<td>Y</td>
</tr>
<tr>
<td>NewOrExistingPosition</td>
<td>Must use a selection listed as a value option for “New or Existing Position?” in the data dictionary</td>
<td>Existing Position</td>
<td>Y</td>
</tr>
<tr>
<td>JobType</td>
<td>Must use a selection listed as a value option for “Type of Job” in the data dictionary</td>
<td>Office and Clerical</td>
<td>Y</td>
</tr>
<tr>
<td>FamilyMemberCount</td>
<td>Number (1 – 10) indicating how many client family members live at the client’s home address</td>
<td>3</td>
<td>Y</td>
</tr>
<tr>
<td>FamilyIncome</td>
<td>Total annual income of all family members at client’s home address</td>
<td>32000</td>
<td>Y</td>
</tr>
<tr>
<td>PreviouslyUnemployed</td>
<td>Y or N</td>
<td>Y</td>
<td>Y</td>
</tr>
<tr>
<td>HealthBenefits</td>
<td>Y or N</td>
<td>Y</td>
<td>Y</td>
</tr>
</tbody>
</table>

To obtain a Records Template:
1. After logging in, click **Upload** in the left side menu
2. The Data Upload Tool window will appear
3. At the bottom of the window, links to each kind of available template appear
4. Click the link of the type of template you want to use
5. Download and save the template, which is an Excel file

**Uploading Multiple Clients at Once**

To upload multiple clients all at once:
1. Follow the steps under “To obtain a Records Template” above to download and save the template
2. Open the template in Excel (you may see a warning message about the file name and extension not matching – select ‘Yes’ to open anyway)
3. Enter your client information into the spreadsheet using the column headers as your field names (see the above in this manual or the data dictionary included with the template) for field name specifics; the first row has entries you may use as a sample. Required columns are bold and highlighted yellow.
4. When done with your entries, delete the sample entry in the first row
5. Save your file
6. In GMS, click **Upload** in the left side menu
7. The Data Upload Tool window will appear
8. Click **Choose File** or **Browse**
9. Find your upload file, select it, then click **Select** or **Choose**
10. Click the radio button next to the client type you are uploading (People, Businesses, Business Principals, Business Employees)
11. Click **Begin Upload**
12. When the upload is complete, you will be presented with a message indicating success and how many records were successfully uploaded

If there is an issue with any field in any record, a message will appear indicating there are invalid records, how many records have errors, and a downloadable Excel file that shows a list of those records with errors (those without errors have been uploaded)
If you ever have any technical questions using this Grants Management System, please call Cityspan’s Help Desk toll-free at: 866-469-6884
(Monday through Friday, 8:00 AM – 5:00 PM, Pacific Time)

If you ever have any questions regarding project information, what to enter, submission deadlines, or any other administrative items, please contact your Grant Coordinator.

Activities and Outcomes: Client Activities

Your project’s Activities and Outcomes were established during the negotiation period of the project set up process. In order to record client enrollment with activities and achievement of outcomes, please make sure your clients are set up in GMS first.

Clients are not linked to activities or outcomes until a date is entered and saved.

Enrolling Clients in Activities

To enroll clients in activities:
1. After logging in, select the project which has the activities to which you want to enroll clients
2. Click Client Activities in the left side menu
3. A list of your selected project’s activities will appear

4. Click on the name of the activity to which you want to enroll clients

5. In the “Enrollment” section, click ‘Click here to enroll clients’
   Clients must be set up in GMS before they can be enrolled.

6. Use the Find Clients tool to find the client or clients you want to enroll

7. Based on your search, one or more clients will be listed, each with an Enroll checkbox to its left (you will also see Date of Birth for people clients, which is included to help confirm identity such as when two people have the same name)

8. Click the box(es) to the left of the individual client(s) you want to enroll (if you want to enroll all listed clients at once, click the ‘All’ link at the top – you may uncheck all boxes at once by clicking the ‘None’ link at the top
9. When done, click **Next Step**

10. On the next screen, “Step 3: Select Enroll Date(s),” enter the start date for each client (you may enter a date by typing into the field in mm/dd/yy format, or you may click the calendar icon to select a date) – a start date is required; you may automatically set the same date (either today’s date or the date of the beginning of the activity) by clicking the corresponding link at the top

Clients are not linked to activities or outcomes until a date is entered and saved.

11. When done, click **Next Step**

12. Check the information on the confirmation page, and if all is correct, click **Done** (if there are any errors, you may view and edit a client’s activities – see below)

### Viewing / Editing Client Activity Enrollment

To view enrollees, update start dates, unenroll clients, or enter optional end dates:

1. Follow the steps in “Adding Clients to Activities” above
2. In the “Current Enrollees” section, click ‘Click here to view enrollees, update start dates, or enter optional end dates’
3. You will see a list of the clients you enrolled, as well as the start date you entered into the system – you may edit the start date; you may also click ‘Un-enroll’ to remove a client from the activity.

4. You will also see a field for “End Date” – you may enter the date your client completed the activity.

5. When done with your entries, click **Save**

**Viewing / Editing Client Outcomes**

To view enrollees, update start dates, or enter optional end dates:

1. Follow the steps in “Adding Clients to Activities” above
2. If the selected activity has outcomes associated with it, they will appear as the last set of items on the Activity screen.
3. Find the outcome for which you want to record client achievement, then click ‘Click here to record outcomes and dates’
4. You will see a list of clients you enrolled in the selected activity

Clients are not linked to activities or outcomes until a date is entered and saved.

5. You may enter the date the client achieved the outcome into the “Outcome Date” field
6. When done with your entries, click Save

**Viewing Client Activities / Outcomes Records**

To view enrollees, update start dates, or enter optional end dates:
1. After logging in, **Clients** in the left side menu
2. Use the search tools to find the client whose record you want to review
3. Select an individual client by clicking on the name
4. Click the ‘Activities’ tab
5. You will be presented with a list of the activities for which the selected client is enrolled, as well as outcomes
Activities and Outcomes: Non-Client Activities

Your project’s Activities and Outcomes were established during the negotiation period of the project set up process. Non-client activities are those that have as goals a number of services that a grantee provides (for example number of meals, number of meetings, number of rides).

Non-client activities are recorded on the monthly Activities and Outcomes forms on the Report and Reimbursement screen.

**Reporting Non-Client Activity Fulfillment**

Non-client activity progress is reported by entering the number of a particular activity that occurred during the reporting month or the date of completion.

**To report monthly non-client activity progress:**
1. After logging in, select the project which has the non-client activities for which you want to report progress.
2. Click **Reporting** in the left side menu.
3. Within the report month you want to enter non-client activity progress, click **Activities and Outcomes**.
4. Find the non-client activity for which you would like to report progress (non-client activities appear after all client activities on this screen).
5. In the “Month # or Completion Date” field, enter either the number that occurred that month, or if complete, enter the date of completion in format mm/dd/yyyy.

6. Click a button at the top of the screen, as follows (you may save and return to view or edit as often as you want, but you must click Submit for your Activities and Outcomes to be reported for the selected month):

- **Save** saves your work and allows you to come back later to complete
- **Save and Return** saves your work, allows you to come back later to complete, and returns you to the previous screen
- **Submit** submits the completed form and locks you from further changes
- **Return** returns you to the previous screen without saving any changes

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If you ever have any questions regarding project information, what to enter, submission deadlines, or any other administrative items, please contact your Grant Coordinator.