

## Course Overview, Course Goal, and Objectives

Welcome to the FEMA Grants Portal - Transparency at Every Step course.

This course will provide in-depth training to Recipients and Applicants to bring clarity to the Public Assistance process, specifically regarding the use of the Public Assistance Grants Portal. The course will cover all information needed to substantiate a project in Grants Portal, including the documentation required for each phase of the Public Assistance process. By the end of the course, State, Local, Tribal, and Territorial Recipients and Applicants will be able to use Grants Portal as it pertains to the Public Assistance Program.

Upon completion of this course, participants will be able to:

- Demonstrate the benefits of transparency by using Grants Portal
- Explain how the Recipient and the Applicant can use Grants Portal to review and manage projects throughout their life cycle
- Describe the user-friendly approach to navigating Grants Portal

## Lesson 1 Overview and Objectives

This lesson provides an overview of administrative requirements, course goal and objectives, and provides an overview of the management and coordination capabilities of Grants Portal.

Upon completion of this lesson, participants will be able to:

- Identify administrative requirements of the course
- State the goals and objectives of the course
- Describe the Grants Portal capabilities and benefits

## Grants Portal

FEMA developed the Grants Portal to streamline the Public Assistance process and facilitate collaboration between FEMA, Recipient, and the Applicant. The system benefits the Recipient and the Applicant in the following ways:

- Facilitates full project visibility
  - Sign in to their account and view their project status during the Public Assistance process
- Enhances coordination and communication
  - Communicate with and set up meetings with their Program Delivery Manager via Grants Portal
- Streamlines work
  - Upload all work and documentation related to the Applicant's project into Grants Portal. It also sends automatic notifications when there are tasks to complete
- Improves document collection and retention
  - Upload pertinent documentation and store it in the system for future use. These can be updated at any time



## Grants Portal as It Pertains to Public Assistance

The Recipient and the Applicant can use the Grants Portal to complete a wide range of tasks during the Public Assistance process, such as:

- Set up and manage organizational details
  - Add personnel
  - Upload documents
  - Assign staff
  - Collect and receive information from FEMA
  - Submit supporting documentation in one consolidated location
- Submit and manage Requests for Public Assistance
- Review the Damage Description and Dimensions
- Scope and cost a project
- Monitor project status
- Review and approve projects

## Administrative Management of Grants Portal

FEMA provides an easy three-step process for the Recipient and Applicants to obtain access to the Grants Portal.

1. FEMA grants access to the Recipient
2. The Recipient grants access to the Applicant
3. The Recipient and Applicant manage their personnel

From: [support@pagrants.fema.gov](mailto:support@pagrants.fema.gov) [mailto:[support@pagrants.fema.gov](mailto:support@pagrants.fema.gov)]  
Sent: Thursday, November 23, 2017 3:11 PM  
Subject: FEMA PA Notification – Org Account Request Approved

Hello Sherry.

Your organization account request has received final approval. You may now log in to the Grants Portal with the temporary username and password:

Username: [comanager@subrecipientcountyga.com](mailto:comanager@subrecipientcountyga.com)  
Password: LJE1kAvc!%

Please click <https://pagrants.fema.gov> to sign in with your temporary password. You will be required to change your password upon login.

-FEMA PA Support Team

[FEMA-PA-Support@FEMA.DHS.Gov](mailto:FEMA-PA-Support@FEMA.DHS.Gov)  
<https://pagrants.fema.gov>

## Support Hotline for Grants Portal

The Grants Portal also has a support hotline, which can be reached at 1-866-337-8448. A Recipient or Applicant should use this if they have any questions about Grants Portal.



## Lesson 1 Summary

This lesson provided an overview of the administrative requirements, goals, and objectives of the course as well as an overview of the management and coordination capabilities of the Grants Portal.

The next lesson provides an overview of the capabilities of Grants Portal including account management.

## Lesson 2 Overview and Objectives

This lesson provides an overview of the capabilities of the Grants Portal and covers the necessary information to establish and manage profile accounts. This lesson also describes information management in the Grants Portal including receiving notifications and uploading required documentation.

Upon completion of this lesson, participants will be able to:

- Describe various procedures for profile account initiation within Grants Portal
- Review best practices for account management within Grants Portal

## Technical Capabilities of Grants Portal

Grants Portal is a web-based project tracking system used by FEMA and its stakeholders. Grants Portal acts as a collection and retention center for documentation required by FEMA for an Applicant to obtain grant funding.

Grants Portal:

- Facilitates full project visibility
- Enhances coordination and communication
- Streamlines work
- Improves document collection and retention

FEMA recommends Recipients and Applicants use the Internet browser Mozilla Firefox to fully utilize all technical capabilities and to ensure optimal performance of Grants Portal.



## Obtaining Access to Grants Portal

As discussed in the previous lesson, FEMA provides an easy three-step process for Recipient and Applicants to obtain access to Grants Portal and create an organization account:

1. FEMA grants access to the Recipient
2. Recipient grants access to the Applicant
3. Recipient and Applicant manages their personnel

## Grants Portal Organization Account (1 of 2)

The organization account is a central location where Public Assistance processes are documented and monitored, as well as a tool that FEMA, Recipient, and Applicant can use to interact with each other. This centralized workspace greatly facilitates the Public Assistance process.

The first step to set up an organization account for both the Recipient and Applicant occurs after FEMA and the Recipient have their initial meeting. This occurs at the beginning of an incident for Recipients and Applicants who have not already created an account in Grants Portal or who have not received an invite during a non-event.

## Grants Portal Organization Account (2 of 2)

Once FEMA has established the Recipient account, the Recipient will send the Applicant an invitation via Grants Portal that will send an email:

- The Applicant should regularly check their email they provided to the Recipient

The Applicant should:

- Open the email that was generated from Grants Portal with the email address of support@pagrants.fema.gov
- Read the email thoroughly
- Select the link in the text to begin creating an organization account

To create and submit an organization account request, an Applicant must provide the following information in Grants Portal:

- Organization information
- Contact information
- Location information
- Applicable counties

## Obtaining Access to Grants Portal: FEMA to Recipient

Recipients receive initial access to Grants Portal once an event occurs.

Once the Recipient selects the link in their email, the hyperlink brings them to the Grants Portal site to register their organization. The first screen asks for the Recipient to input their basic information.

Directions for inputting basic information:

- Ensure the requesting organization is correct
- Input the organization name (e.g., Georgia Emergency Management Agency)
- Select the type of organization represented (e.g., State government, U.S. Territory or possession, or Native American Tribal government)
- Enter the organization Dun and Bradstreet (DUNS) number
- Select the "Next" button to move onto the next screen when ready



Once the Applicant selects the "Next" button on the screen asking for basic information, a new screen loads asking for the organizations primary contact information.

Directions to enter primary contact information:

- Enter first name
- Enter last name
- Enter title
- Enter phone number
- Enter primary email
- Either select the "Next" button to move onto the next screen when ready, or enter information for an alternate contact

The contact information section also allows the Applicant to input information for an alternate contact. The alternate contact should be someone who can act as the primary contact if the primary contact is unavailable.

Directions to enter alternate contact information:

- Enter first name
- Enter last name
- Enter title
- Enter phone number
- Enter email
- Select the "Next" button to move onto the next screen when ready

Grants Portal

Basic Information | Contact Info | Locations

← PREV | NEXT →

Primary Contact Info	Alternate Contact Info
FIRST NAME * John	FIRST NAME
LAST NAME * Smith	LAST NAME
TITLE *	TITLE *
PHONE NUMBER * (940) 555-1234	PHONE NUMBER
EMAIL * test@test.ga.gov	EMAIL

## Grants Portal Organization Account: Organization Location (1 of 2)

Grants Portal directs the Applicant to the organization location screen once they select the "Next" button on the contact information screen.

The Applicant enters the primary location address of their organization. The Applicant also inputs their mailing address, but only if it differs from the primary location address (e.g., An Applicant who has a P.O. Box should provide this information as their mailing address).

Directions to enter primary location of your organization:

- Enter address 1 of the organization's location (e.g., 500 C Street SW)
- Enter address 2 of the organization's location, as needed (e.g., Suite 400)
- Enter the city in which the organization resides
- Enter the state in which the city is located
- Enter the zip code of the organization's location
- Enter the county of the organization's location
- Either select the "Next" button to move onto the next screen when ready, or enter information for a mailing address, as needed

2 Contact Info   3 Locations   4 Facilities   5 C   ← PREV   ▶ NEXT

Primary Location	Mailing Address <small>*Only if different</small>
ADDRESS 1 *	ADDRESS 1
ADDRESS 2	ADDRESS 2
CITY *	CITY
STATE * <small>Select...</small>	STATE <small>Select...</small>
ZIP CODE *	ZIP CODE
COUNTY * <small>Select...</small>	COUNTY <small>Select...</small>

## Grants Portal Organization Account: Organization Location (2 of 2)

If an Applicant's organization has a different mailing address than the primary address of the organization, they also input the mailing address.

Directions to enter the organization's mailing:

- Enter the organization's address 1 of where it receives mail (e.g., P.O. Box 45)
- Enter the organization's address 2 of where it receives mail, as needed (e.g., 500 C Street SW)
- Enter the city in which the organization resides
- Enter the state in which the city is located
- Enter the zip code of the organization's location
- Enter the county of the organization's location
- Select the "Next" button to move onto the next screen when ready

## Grants Portal Organization Account: Facilities Location

Once the Applicant selects the "Next" button, Grants Portal takes them to the facilities location section. Here, the Applicant adds the county location of their facilities or counties in which they have responsibility for activities. Organizations that have Statewide responsibilities have different steps to take than organizations that have facilities or responsibility for activities in a limited number of counties.

Directions for organizations who have statewide responsibilities:

- Select the "Mark Statewide" button
- Select the "Next" button to move onto the next screen when ready

Directions for organizations that have facilities or responsibility for activities in a limited number of counties:

- Select the "Add" button next to the counties the organization has either facilities in or responsibility for activities
- Select the "Next" button to move onto the next screen when ready

Info   3 Locations   4 Facilities   5 Complete Access Req   ← PREV   ▶ NEXT

**Choose all of the Counties where your organization has facilities.**

q SEARCH

County
<span>+</span> ADD Appling County
<span>+</span> ADD Atkinson County
<span>+</span> ADD Bacon County
<span>+</span> ADD Baker County
<span>+</span> ADD Baldwin County
<span>+</span> ADD Banks County
<span>+</span> ADD Barrow County

## Grants Portal Organization Account: Complete Access Request

When selecting the "Next" button, Grants Portal loads a page that completes the access request. The Applicant reviews the information on the page to make sure it is correct.

To review organization information:

- Read the information provided on the screen and ensure it is all correct
- If any information is incorrect, use the "Previous" button to go back to the section which needs editing
- Select the "Submit" button at the bottom of the webpage

**Grants Portal**

ZIP CODE	30067	ZIP CODE	-
COUNTY	Dougherty County	COUNTY	-

Counties with Facility

COUNTIES	Baldwin County, Bartow County, Berrien County, Ben Hill County, Dooly County, Douglas County, Dougherty County
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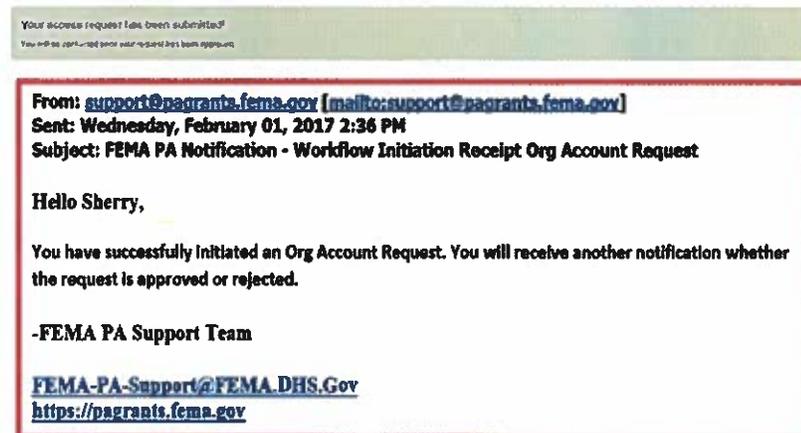
**SUBMIT**

## Grants Portal Organization Account: Completion (1 of 2)

Once the Applicant selects the "Submit" button, a congratulations screen appears. The Applicant has completed their organization account.

Recipients:

- Upon completion, Grants Portal sends a message and task to FEMA personnel, indicating that the Recipient completed their organization account
- Grants Portal immediately sends an email to the Recipient that states they successfully initiated an organization account request
- FEMA then reviews the organization account request, approves it, and Grants Portal sends the Recipient an email which prompts them to add additional personnel.



## Grants Portal Organization Account: Completion (2 of 2)

Applicants:

- Upon completion, Grants Portal sends a message and task to the Recipient, indicating that the Applicant completed their organization account
- Grants Portal immediately sends an email to the Applicant that states they successfully initiated an organization account request
- The Recipient reviews the organization account request and approves it
- Grants Portal sends another email to the Applicant prompting them to create their account and add personnel

Your access request has been submitted!  
You will be contacted once your request has been approved.

From: [support@pagrants.fema.gov](mailto:support@pagrants.fema.gov) [mailto:[support@pagrants.fema.gov](mailto:support@pagrants.fema.gov)]  
Sent: Wednesday, February 01, 2017 2:36 PM  
Subject: FEMA PA Notification - Workflow Initiation Receipt Org Account Request

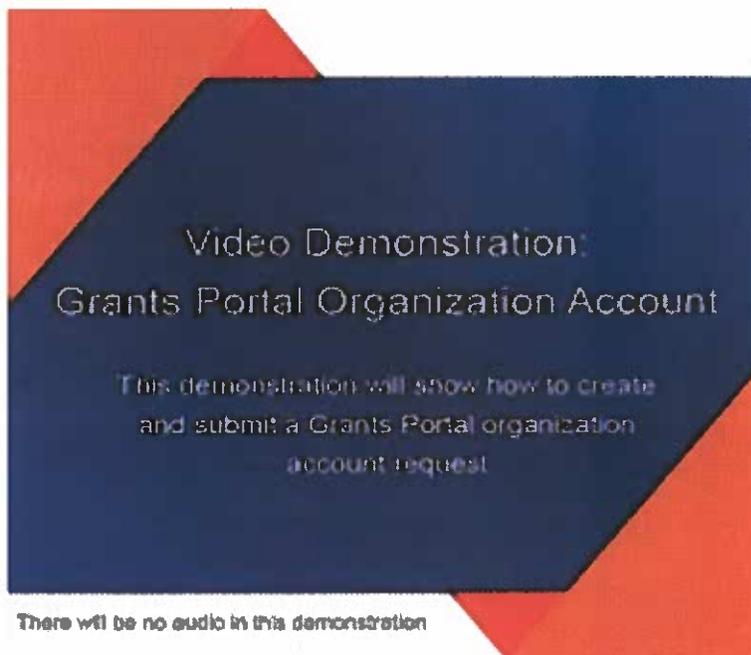
Hello Sherry,

You have successfully initiated an Org Account Request. You will receive another notification whether the request is approved or rejected.

-FEMA PA Support Team

[FEMA-PA-Support@FEMA.DHS.Gov](mailto:FEMA-PA-Support@FEMA.DHS.Gov)  
<https://pagrants.fema.gov>

## Grants Portal Organization Account: Video Example



Please watch the video to review how to create and submit a Grants Portal organization account request.

## Grants Portal Account Activation

Once an organization account is successfully created, the Applicant will be able to create individual user accounts. The individual user accounts are the entry point where most of the work is conducted. Grants Portal will send emails containing log in information to each new user, where they will need to follow the instructions to log into the system.

The subsequent slides outline the activation process.

## Activating a Grants Portal Account: Activation Email

The next step in acquiring access to Grants Portal is setting up a personal Grants Portal account.

Recipients:

Recipient personnel will receive an email with a username and temporary password which they use to log in to Grants Portal.

Applicants:

Upon obtaining Recipient approval for the organization account, individual users receive an email with a username and temporary password which they use to log in to Grants Portal.

Directions to activate Grants Portal account:

- Open the email from FEMA
- Review the email and take note of the username and temporary password
- Select the link that says to sign in with the temporary password.

From: [support@pagrants.fema.gov](mailto:support@pagrants.fema.gov) [mailto:[support@pagrants.fema.gov](mailto:support@pagrants.fema.gov)]  
Sent: Thursday, November 23, 2017 3:11 PM  
Subject: FEMA PA Notification – Org Account Request Approved

Hello Sherry,

Your organization account request has received final approval. You may now log in to the Grants Portal with the temporary username and password:

Username: [comanager@subrecipientcountyga.com](mailto:comanager@subrecipientcountyga.com)  
Password: LJE1kAvc!%

Please click <https://pagrants.fema.gov> to sign in with your temporary password. You will be required to change your password upon login.

-FEMA PA Support Team

[FEMA-PA-Support@FEMA.DHS.Gov](mailto:FEMA-PA-Support@FEMA.DHS.Gov)  
<https://pagrants.fema.gov>

## Activating a Grants Portal Account: Welcome Screen

When the individual user selects the link in their email, it brings them to Grants Portal to set up their account.

Directions to activate a Grants Portal account:

- Read the screen that welcomes the user
- Select the "Next" button to move to the next screen when ready

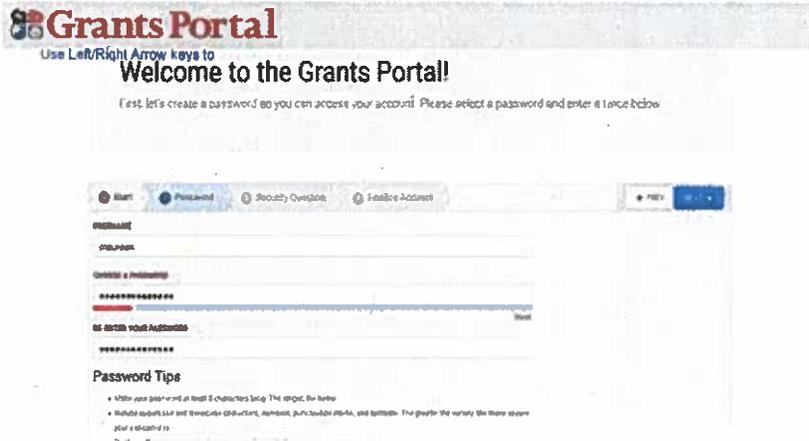


## Activating a Grants Portal Account: Choosing a Password

After the individual user selects the "Next" button, Grants Portal directs them to a screen that allows them to set up the password for their account.

Directions to create a password:

- Ensure the username is correct
- Choose and enter a password
  - The password must be at least eight characters long
  - The password may include uppercase and lowercase characters, numbers, punctuation marks, and symbols
- Re-enter the password to confirm it
- Select the "Next" button to move to the next screen when ready



## Activating a Grants Portal Account: Selecting a Security Question

Selecting the "Next" button brings the individual user to a screen that asks the individual user to select a security question and answer.

Directions for setting a security question and answer:

- Select a security question (e.g., What is your oldest sibling's middle name?)
- Enter a personal answer to the question
- Re-enter the security answer to confirm it
- Select the "Next" button



## Activating a Grants Portal Account: Review Screen

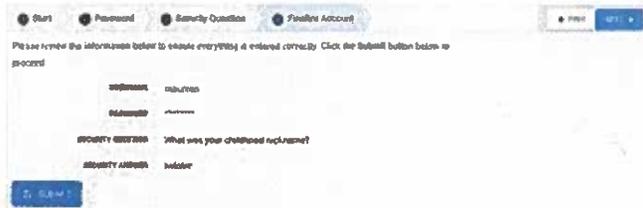
After the individual user selects the "Next" button they review the information provided to activate their Grants Portal account.

Directions to review activation information:

- Review the username
- Ensure that the password is correct
- Review the security question
- Ensure the security question answer is correct

### Let's review

Please make sure your selections are correct below. If everything looks good, press the Submit button, otherwise, use the Previous and Next buttons to go back and make any changes.



The screenshot shows a review screen with a progress bar at the top containing four steps: Start, Password, Security Questions, and Finalize Account. The 'Finalize Account' step is currently active. Below the progress bar, there is a 'PREV' button on the left and a 'NEXT' button on the right. The main content area contains the text: 'Please review the information below to ensure everything is entered correctly. Click the Submit button below to proceed.' Below this text are four rows of information, each with a label and a value: 'USERNAME' with 'mduffy', 'PASSWORD' with '\*\*\*\*\*', 'SECURITY QUESTION' with 'What was your childhood nickname?', and 'SECURITY ANSWER' with 'miller'. At the bottom left of the form is a blue 'SUBMIT' button.

## Activating a Grants Portal Account: Congratulations Screen

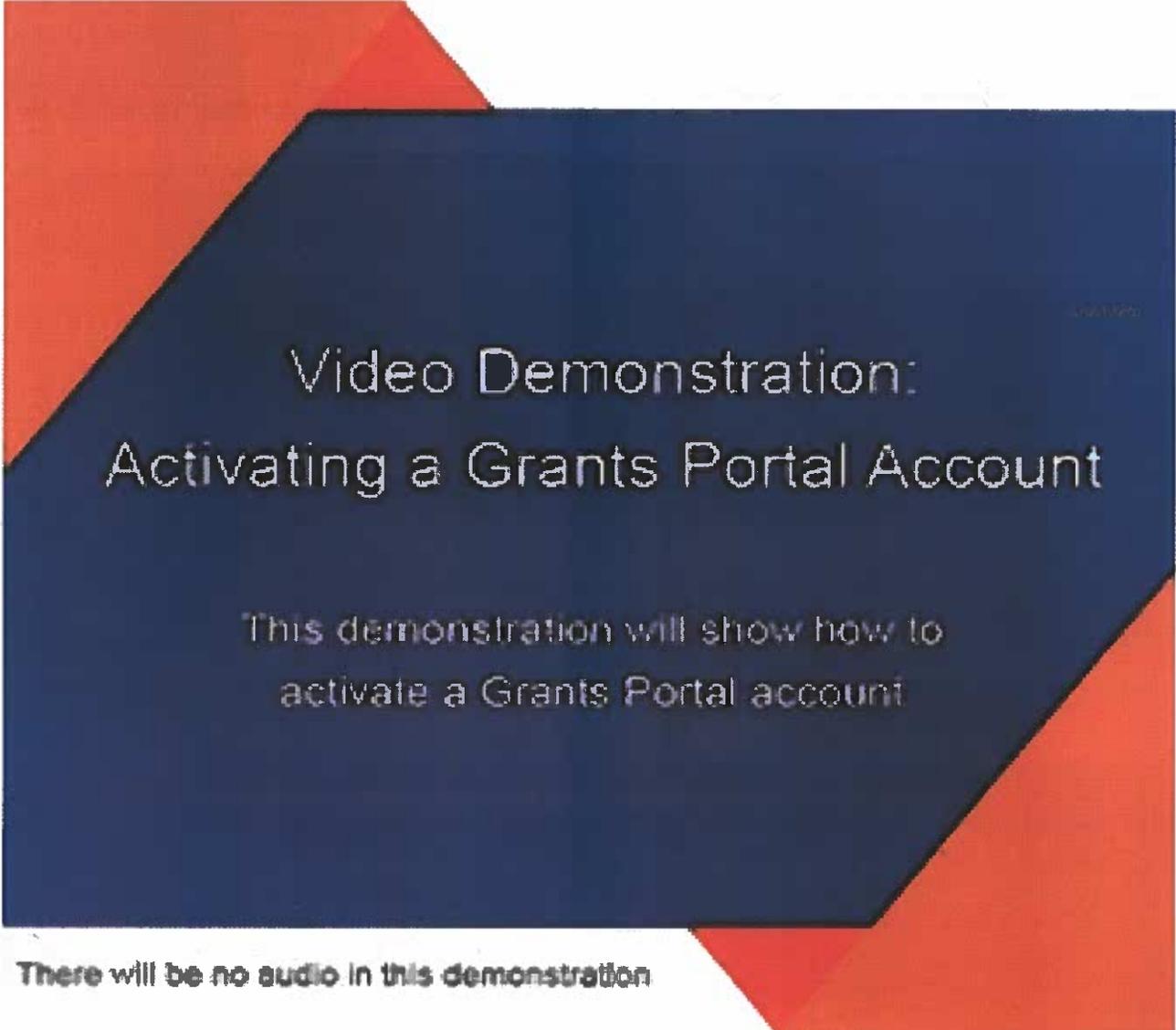
Selecting the "Next" button brings the individual user to the final activation screen. This screen congratulates the individual user for activating their account. The individual user now has access to Grants Portal.

### Congratulations!

Your account has been activated. Use this button below to continue.

[Click here to log in.](#)

## Activating a Grants Portal Account: Video Example

The slide features a dark blue central area with white text, set against a background of red and blue geometric shapes. The text is centered and reads: "Video Demonstration: Activating a Grants Portal Account".

## Video Demonstration: Activating a Grants Portal Account

This demonstration will show how to  
activate a Grants Portal account

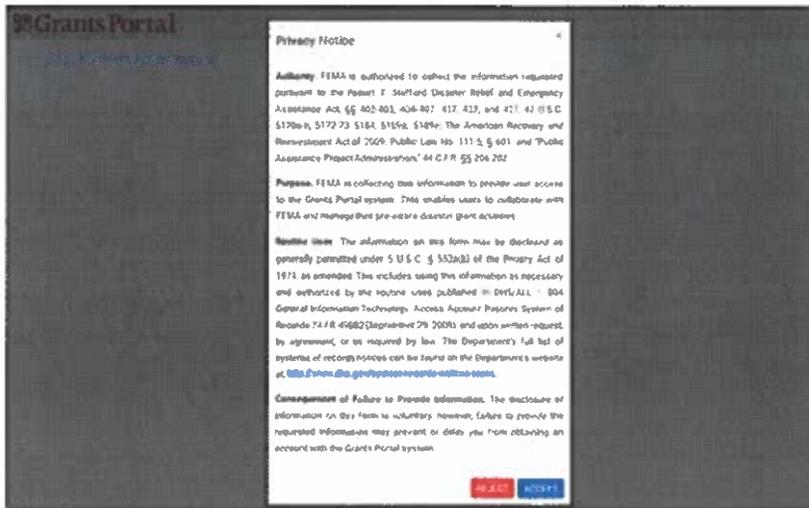
**There will be no audio in this demonstration**

### **Logging in to Grants Portal: Privacy Notice Pop-Up**

After selecting the "Sign In" button, a pop-up window with a privacy notice window will appear. The privacy notice informs the individual user that FEMA collects the information in Grants Portal for grants purposes.

Directions to access Grants Portal:

- Read the privacy notice
- Select the "Accept" button

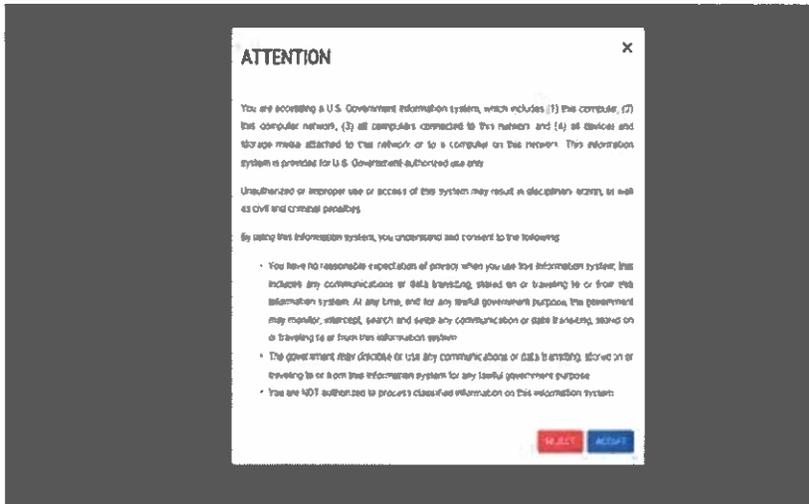


## Logging in to Grants Portal: Attention Pop-Up

After selecting the "Accept" button, a pop-up window with an attention notice will appear. The attention notice informs the individual user that they are accessing a United States Government information system.

Directions to access Grants Portal:

- Read the attention notice
- Select the "Accept" button



## Grants Portal Dashboard

After the account setup process is complete, the individual user will be taken to the Grants Portal Dashboard. This is the main screen where the individual user will be able to navigate to other parts of Grants Portal.

It is important to note that the Dashboard is completely customizable depending on the user's preference. There will be more information on customizing the Grants Portal Dashboard in a later lesson of this course.



## Inviting an Applicant to the Grants Portal (1 of 5)

After an incident occurs and the President declares an emergency or major disaster, Recipients hold an Applicant Briefing. At this meeting, the Recipient collects information from attendees. They then use the information to invite the Applicants to create organization accounts and personnel accounts in Grants Portal.

Directions to invite an Applicant to the Grants Portal:

- Select the "My Organization" tab on the left side of the dashboard
- Select the "Organization Profile" under the "My Organization" tab



## Inviting the Applicant to the Grants Portal (2 of 5)

Once Grants Portal loads the "Organization Profile," the Recipient then manages their subrecipient organizations' profiles to add an Applicant.

Directions to invite an Applicant to the Grants Portal:

- Select the "Manage" button to the right of the subrecipient organization profiles drop-down list



## Inviting the Applicant to the Grants Portal (3 of 5)

After the Recipient selects the "Manage" button, the "Subrecipient Organization Profiles" page loads.

Directions to invite an Applicant to the Grants Portal:

- Select the "New Organization" button
- Select "Invite" from the drop-down list

Name	Type	FFP?	FFP Type	Recipient Region	State/Territory	Last Seen Login
Adel, City of	City or Township Government	No	Direct	GA	Georgia Emergency Management Agency	09/26/2017 02:22 PM CDT
Albany	City or Township Government	No	Direct	GA	Georgia Emergency Management Agency	10/02/2017 01:12 PM CDT
Albany-Albany City Housing Authority	Public / Indian Housing Authority	No	Direct	GA	Georgia Emergency Management Agency	09/26/2017 06:58 AM CDT
Albany Museum of Art	Nonprofit (501)(C)(3) Not a State or Other than Institution of Higher Education	Yes	Match	GA	Georgia Emergency Management Agency	08/02/2017 11:21 AM CDT
Albany State University	Public/State Controlled Institution of Higher Education	No	Direct	GA	Georgia Emergency Management Agency	08/08/2017 07:01 PM CDT
Aphrissville, City of	City or Township Government	No	Direct	GA	Georgia Emergency Management Agency	10/02/2017 01:20 PM CDT

## Inviting the Applicant to the Grants Portal (4 of 5)

After the Recipient selects "Invite" in the drop-down list, Grants Portal directs them to the "Invite Organization" page.

Directions to invite an Applicant to the Grants Portal:

- Review the requesting organization to ensure the Recipient's organization is inviting the Applicant
- Select the text box next to "Organization Name" and input the Applicant's organization
- Select the drop-down list next to "Type" and choose the appropriate type of organization to represent the Applicant
- Select the text box next to "First Name" and enter the contact's first name (i.e., The person who attended the Applicant Briefing)
- Select the text box next to "Last Name" and enter the contact's last name
- Select the text box next to "Phone Number" and enter the contact's phone number
- Select the text box next to "Email" and enter the contact's email
- Select the "Save" button in the top-right corner of Grants Portal once done entering information

## Inviting the Applicant to the Grants Portal (5 of 5)

After saving the invitation, Grants Portal automatically sends an email invitation to the Applicant. Grants Portal also loads the "Organization Invitation" page for the Recipient to review the information input for the Applicant.

Directions to invite an Applicant to the Grants Portal:

- Review the information to ensure all information is correct



## Reviewing the Applicant's Organization Account Request (1 of 5)

After the Applicant completes the organization account request, Grants Portal notifies the Recipient that they have an organization account request task to complete in Grants Portal.

Directions to review the Applicant's organization account:

- Read the email
- Select the link in the email to go to Grants Portal
- Sign in to Grants Portal

From: support@grants.fema.gov [mailto:support@grants.fema.gov]  
Sent: Wednesday, March 01, 2017 9:17 AM  
To: Nicole Rines  
Subject: FEMA PA Notification - Workflow Item Review Required Org Account Request

Hello Nicole,

An Org Account Request workflow item has been assigned to you and requires your review. To view the workflow item please use the following link:

<https://grants.fema.gov/workflow/details/136>

-FEMA PA Support Team

[FEMA-PA-Support@FEMA.DHS.Gov](mailto:FEMA-PA-Support@FEMA.DHS.Gov)  
<https://grants.fema.gov>

## Reviewing the Applicant's Organization Account Request (2 of 5)

After the Recipient selects the link in their email and signs in to Grants Portal, they navigate to the "Invitations and Requests" tab.

Directions to review the Applicant's organization account:

- Select the "Subrecipients" tab on the left side of Grants Portal
- Select the "Invitations and Requests" tab located under "Subrecipients"
- Select the magnifying glass next to the name of the organization for the organization account you want to review

Name	Parent Org	Org Type	Created	Created By	Submitted	Status
Verplex	Colorado	City or Township Government	12/5/2017 11:45 am	Samuel, Shanté		Invited
Adams County	Colorado	County Government	10/23/2017 7:06 pm	Smith, Kelly		Invited
Midstate Real Estate	Colorado	City or Township Government	9/26/2017 10:48 am	Dauvrie, Karen		Invited
Lon and Karen	Colorado	City or Township Government	8/15/2017 7:23 am	Dauvrie, Karen		Invited
ASH&S	Colorado	U.S. Territory or Possession	7/19/2017 2:27 pm	Tajemala, Sals		Invited
DFW	Colorado	U.S. Territory or Possession	7/19/2017 2:17 pm	Tajemala, Sals		Invited

## Reviewing the Applicant's Organization Account Request (3 of 5)

Grants Portal loads the "Organization Request" page once the Recipient selects the magnifying glass. Here, the Recipient reviews an organization's information and navigates to the organization's workflow.

Directions to review the Applicant's organization account:

- Review the organization's information
- Select the link next to "Workflow"

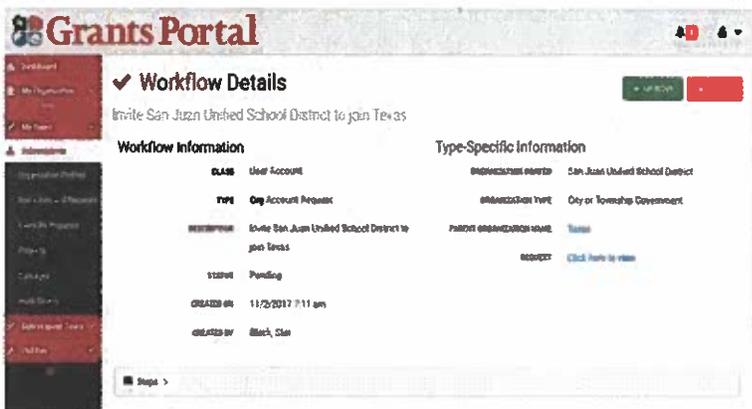


## Reviewing the Applicant's Organization Account Request (4 of 5)

After the Recipient selects the link next to "Workflow," Grants Portal directs the Recipient to the "Workflow Details" page. The Recipient approves or rejects the organization account request at this time.

Directions to review the Applicant's organization account:

- Review the workflow information and type-specific information on the screen
- Select the "Approve" button at the top right of the screen if the organization account is approved
- Select the "Reject" button at the top right of the screen if the organization account is not approved



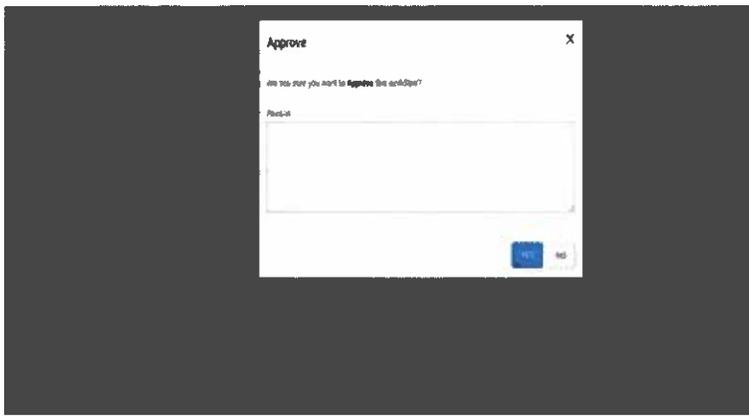
## Reviewing the Applicant's Organization Account Request (5 of 5)

Once the Recipient either chooses to accept or reject the organization account request, a pop-up window appears asking if the Recipient is sure of their determination.

Directions to review the Applicant's organization account:

- Select the "Yes" button in the pop-up window

Once the Recipient approves the Applicant's organization account, Grants Portal sends the Applicant an email with a username and temporary password to set up their personal account.



## Reviewing the Organization Account Request: Video Example

# Video Demonstration: Reviewing the Organization Account Request

This demonstration will show how to review  
the organization account request  
submitted by the Applicant

**There will be no audio in this demonstration**

00:00 | 02:14

Please watch the video on reviewing the organization account request submitted by the Applicant.

## Creating an Organization Profile for the Applicant

A second way for the Recipient to invite an Applicant to the Grants Portal is by creating an organization account for them. This typically occurs if the Applicant does not have access to the internet or cannot complete the organization account for another reason.

Directions to add an organization account for Applicants:

- Select the "My Tasks" tab on the left side of the screen
- Select the "Subrecipients" tab under "My Tasks"
- Select the "Organization Profiles" tab under "Subrecipients"
- Select the "New Organization" button in the top-right corner of Grants Portal

After the Recipient completes the organization account, the Applicant receives an email which states that the Recipient approved their organization account and provides them with a username and temporary password.



Name	Type	PMP#	PMP Type	Recipient Region	State/Territory	Last User Login
Gladwin - PMA2001-4320A	City of Township Government	No			Texas	10/25/2017 11:15 AM CDT
Gladwin - PMA2001-4320A	City of Township Government	No			Texas	
Gladwin - PMA2001-4320A	City of Township Government	No			Texas	10/16/2017 08:28 AM CDT
Gladwin - PMA2004-4320A	City of Township Government	No			Texas	10/15/2017 06:48 AM CDT
Gladwin - PMA2005-4320A	City of Township Government	No			Texas	
Gladwin - PMA2009-4320A	City of Township Government	No			Texas	10/16/2017 02:39 AM CDT
Gladwin - PMA2017-4320A	City of Township Government	No			Texas	10/16/2017 09:32 AM CDT
Gladwin - PMA2006-4320A	City of Township Government	No			Texas	10/15/2017 09:29 AM CDT
Gladwin - PMA2009-4320A	City of Township Government	No			Texas	10/16/2017 07:52 AM CDT

## Creating an Organization Account for the Applicant: Video Example

# Video Demonstration: Creating an Organization Account for the Applicant

This demonstration will show how to create  
an organization account for  
the Applicant

There will be no audio in this demonstration

The screenshot shows the 'Subrecipient Organization Profiles' page in the Grants Portal. The page header includes 'YPM - East Government' and 'YPM FUNDING ID: 001/2021-22'. Below the header, there are five rows of information, each with a dropdown menu and a 'Save' button:

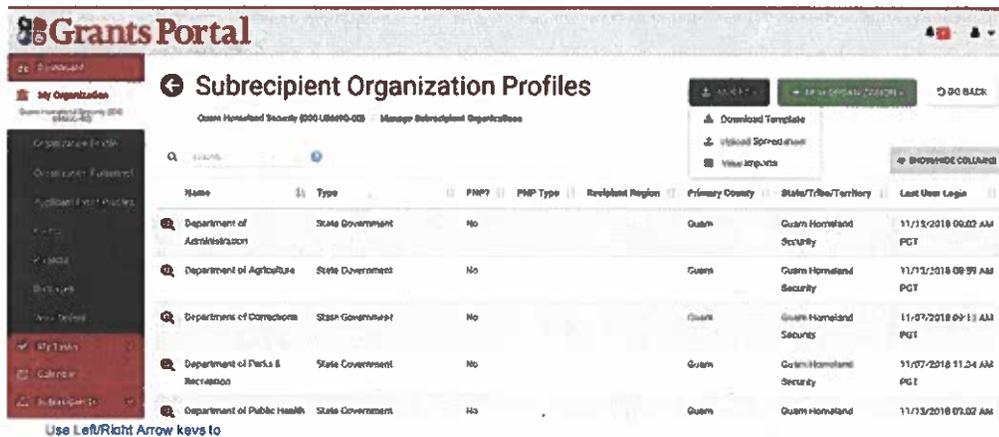
Organization Name	Organization Type	Organization Address	Organization City	Organization State
Recipient Agency	▼	▼	▼	▼
Subrecipient Organization Profile	▼	▼	▼	▼
Personnel	▼	▼	▼	▼
Location	▼	▼	▼	▼
Contacts with Family	▼	▼	▼	▼

## Inviting Multiple Applicant Organizations (3 of 11)

Once the "Subrecipient Organization Profiles" page loads, the Recipient begins the process of importing the list of the Applicants they want to invite to Grants Portal.

Directions to invite multiple Applicants to join Grants Portal:

- Select the "New Organization" button in the top-right corner of Grants Portal
- Select "Import" from the drop-down list



## Inviting Multiple Applicant Organizations (4 of 11)

Once the Recipient selects "Import" in the drop-down list, Grants Portal directs them to the "Import Organization Invitation" page. The Recipient downloads the invitation template and uploads it to Grants Portal.

Directions to invite multiple Applicants to join Grants Portal:

- Select the "Download Template" button in the top-right corner of Grants Portal

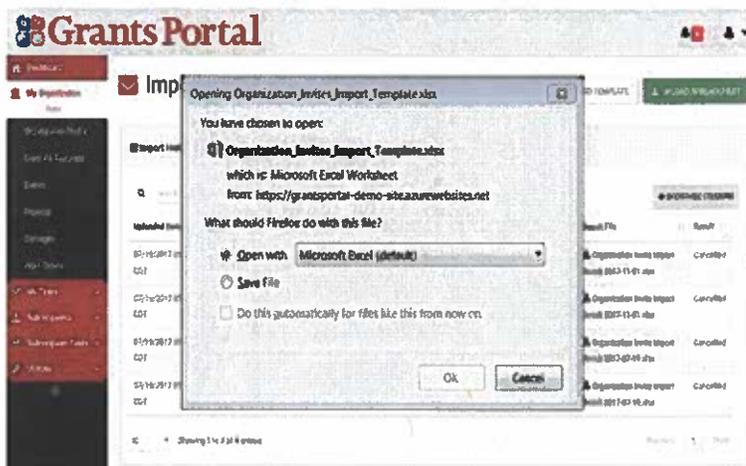


## Inviting Multiple Applicant Organizations (5 of 11)

A pop-up window appears once the Recipient selects the "Download Template" button asking the Recipient to open the spreadsheet which holds the template.

Directions to invite multiple Applicants to join Grants Portal:

- Select the "OK" button in the pop-up window



## Inviting Multiple Applicant Organizations (6 of 11)

The template opens in Microsoft Excel once the Recipient selects "OK" in the pop-up window. The Recipient enables editing of the document before they populate the spreadsheet. The Recipient then inputs the following information into the template for the multiple organizations they want to invite to Grants Portal:

- Organization name
- Organization type
- Contact's first name
- Contact's last name
- Contact's email
- Contact's phone number

Directions to invite multiple Applicants to join Grants Portal:

- Select the "Enable Editing" button in the task bar
- Enter the appropriate information for all organizations to be invited to Grants Portal
- Save the template as a file that can be uploaded later
- Exit out of the file

	A	B	C	D	E	F
1						
2	San Juan Unified School District	City or Township Government	Victoria	Oroville	<a href="mailto:vic@sanjuanunified.org">vic@sanjuanunified.org</a>	2222682009
3	San Juan Public Works	Special District Government	Joy	Tafelberg	<a href="mailto:joy@sanjuanpubworks.org">joy@sanjuanpubworks.org</a>	2222682009
4						
5						
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22						

### Inviting Multiple Applicant Organizations (7 of 11)

After completing and saving the organization invitation template, the Recipient navigates back into Grants Portal to the "Import Organization Invitation" page.

Directions to invite multiple Applicants to join Grants Portal:

- Navigate to the "Import Organization Invitation" page in Grants Portal
- Select the "Upload Spreadsheet" in the top-right corner of Grants Portal

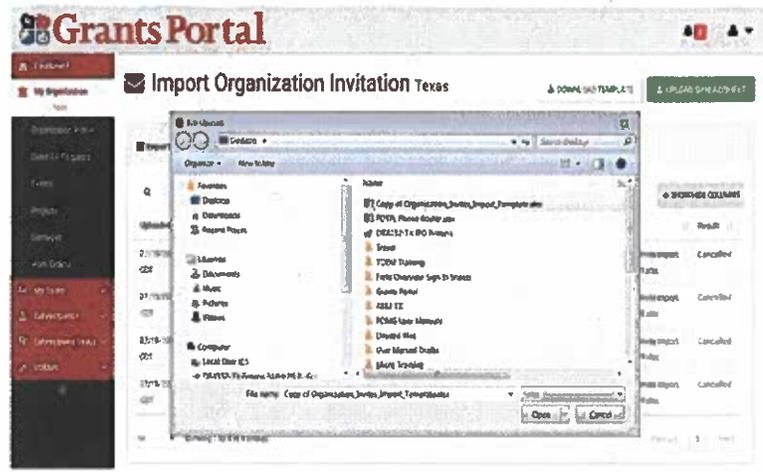


### Inviting Multiple Applicant Organizations (8 of 11)

The File Explorer window then pops up. The Recipient navigates their files to find the saved file. The completed template can now be uploaded into Grants Portal.

Directions to invite multiple Applicants to join Grants Portal:

- Navigate File Explorer to find the saved completed **template** - Arrow keys to
- Select the file that holds the organizations' information.
- Select the "Open" button

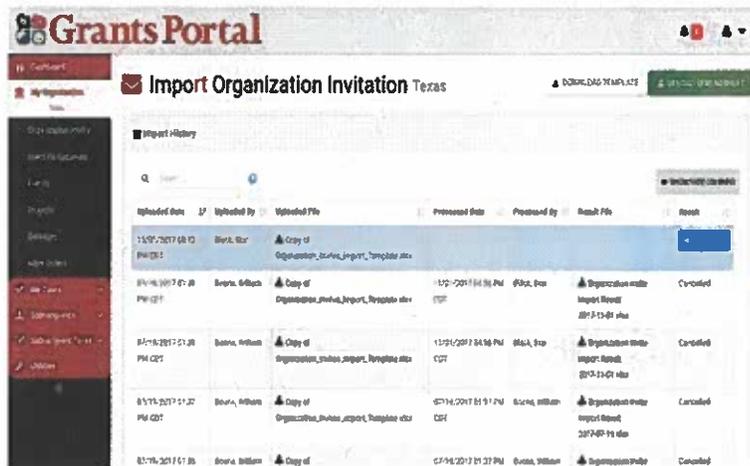


## Inviting Multiple Applicant Organizations (9 of 11)

After the Recipient selects the "Open" button, a row appears under "Import History" in the "Import Organization" page. The row is highlighted in blue. The Recipient continues the process to upload the information from the document into Grants Portal.

Directions to invite multiple Applicants to join Grants Portal:

- Look for the blue highlighted row on the screen for the file uploaded into Grants Portal. It is the top row
- Select the "Continue" button in the row on the right-side of Grants Portal



## Inviting Multiple Applicant Organizations (10 of 11)

When the Recipient selects the "Continue" button, Grants Portal populates with the organization information from the uploaded spreadsheet. Grants Portal runs a scan for misinformation in the spreadsheet. The system then notifies the Recipient of the following information:

- Total records imported
- New organization invite records
- Records with errors
- Records with warnings

Directions to invite multiple Applicants to join Grants Portal:

- Review the information provided by Grants Portal to identify if any errors or warnings exist in the spreadsheet
- Select the "Cancel Import" button if errors or warnings exist in the spreadsheet (note: review the organization information in the spreadsheet for any errors and then repeat the process of uploading the spreadsheet)
- Select the "Commit Import" button if no errors or warnings exist



## Inviting Multiple Applicant Organizations (11 of 11)

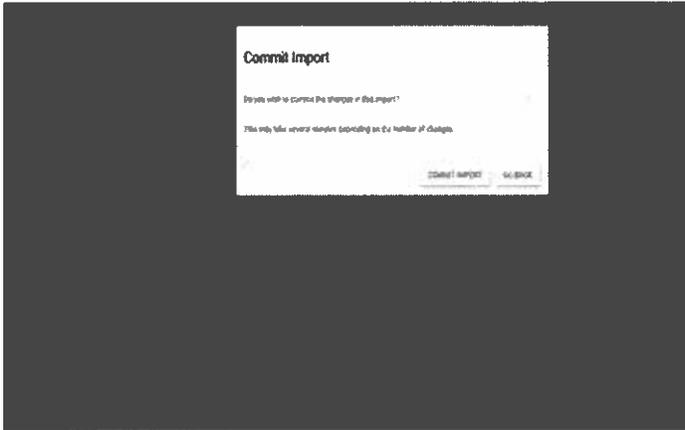
After the Recipient selects the "Commit Import" button, a pop-up window appears asking if the Recipient is sure they want to import the file.

Directions to invite multiple Applicants to join Grants Portal:

- Review the pop-up window information

- Select the "Commit Import" button on the pop-up window

Once the Recipient imports the spreadsheet, Grants Portal will send an email to all of the organizations requesting they set up an organization account.



## Inviting Multiple Applicant Organizations: Video Example

# Video Demonstration: Inviting Multiple Applicant Organizations

This demonstration will show how to invite  
multiple Applicant organizations to  
Grants Portal

There will be no audio in this demonstration

## Setting Up and Editing Your Organization Profile (2 of 2)

Once a Recipient or Applicant selects the "Organization Profile" tab, Grants Portal directs them to their "My Organization Profile."

Here, a Recipient or an Applicant sets up and edits anything they need including:

- General information
  - "State/Tribe/Territory" designation (e.g., Colorado)
  - "Level 2" designation (e.g., Fort Collins) - only in Applicant Grants Portal account
  - "Type" designation (e.g., city or township government, State government)
  - "Is Active" designation
  - "FEMA PA Code" designation
  - "DUNS Number"
- Recipient Regions - only in Recipient Grants Portal account
- Subrecipient Organization Profiles - only in Recipient Grants Portal account
- Personnel
- Locations



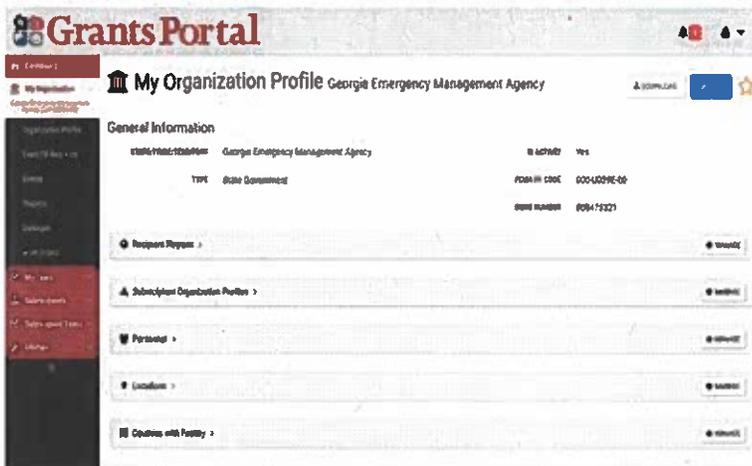
- Counties with Facility
- Insurance Profile
- Applicant Event Profiles
- Documents
- Events - Note that if the Applicant has been in multiple events, those will be listed here. However, the Applicant cannot edit this section.
- Action Log

## Adding Personnel User Accounts (1 of 3)

Another function of Grants Portal is that Recipients and Applicants can add personnel user accounts so that multiple people have access to the system from their organization.

To add personnel user accounts:

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" on the left side of the Grants Portal
- Select the "Manage" button located to the right of the Personnel drop-down list

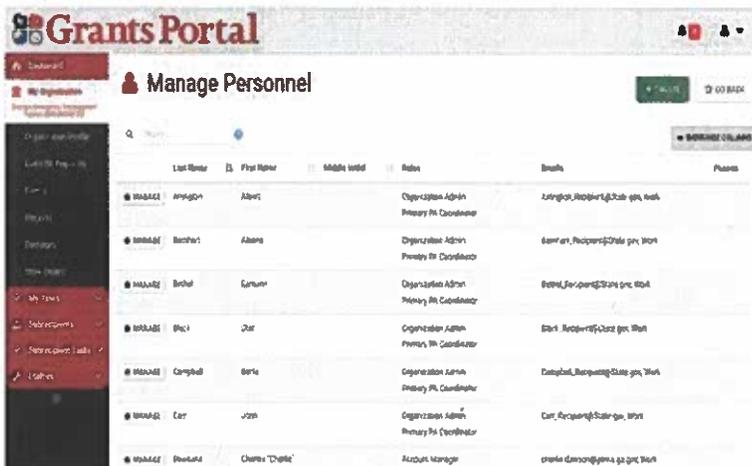


## Adding Personnel User Accounts (2 of 3)

After the Recipient or Applicant selects the "Manage" button, Grants Portal directs them to the "Manage Personnel" page. This page displays all personnel user accounts linked to their organization.

To add personnel user accounts:

- Select the "Create" button in the top-right corner of Grants Portal



## Adding Personnel User Accounts (3 of 3)

A pop-up window requesting the Recipient or Applicant to input the new personnel user account information appears.

To add personnel user accounts:

- Select the text box next to "First Name" and input the person's first name
- Select the text box next to "Last Name" and input the person's last name
- Select the text box next to "Middle Initial" and input the person's middle initial
- Select the text box next to "Title" and input the person's title
- Select the text box next to "Email" and input the person's email
- Select the text box next to "Confirm Email" and re-enter the person's email
- Select the text box next to "Phone" and enter the person's phone number
- Select the text box next to "Mobile Phone" and enter the person's mobile phone number
- Select the text box next to "username" and enter the person's username
- Select the "Save" button once you enter all information



The screenshot shows a web form titled "Create Personnel" for the "George Emergency Management Agency". The form includes the following fields:

- Organization: George Emergency Management Agency
- First Name \*
- Last Name \*
- Middle Initial
- Title
- Email \*
- Confirm Email \*
- Phone
- Mobile Phone
- Username \*

At the bottom right of the form, there is a green "Save" button and a "Cancel" button.

Use Left/Right Arrow keys to

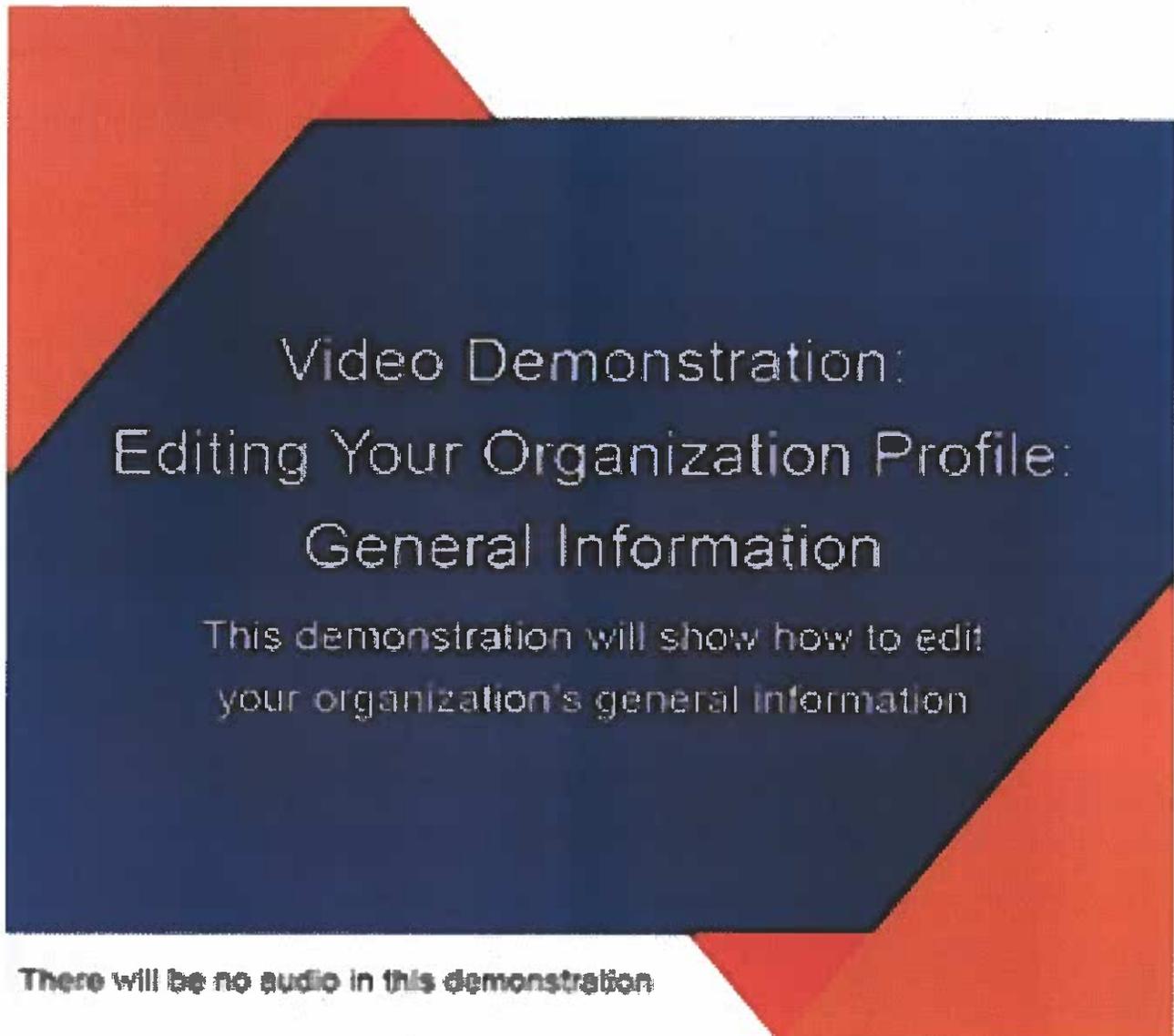
## Adding Personnel User Accounts: Video Example



- Check or uncheck the checkbox next to "Active"

Select the "Save" button to save all edits. Once the Recipient or the Applicant selects the "Save" button, Grants Portal immediately directs them to the "My Organization Page."

## Editing Your General Information: Video Example



Please watch the video to review how to edit your organization's general information.

## Editing Your Organization Profile: Manage Locations (1 of 4)

Another option the Recipient or Applicant has on the "My Organization Profile" page is to edit the locations of their facility.

Directions to edit the organization location:

- Select the "Manage" button opposite the location drop-down list



## Editing Your Organization Profile: Manage Locations (2 of 4)

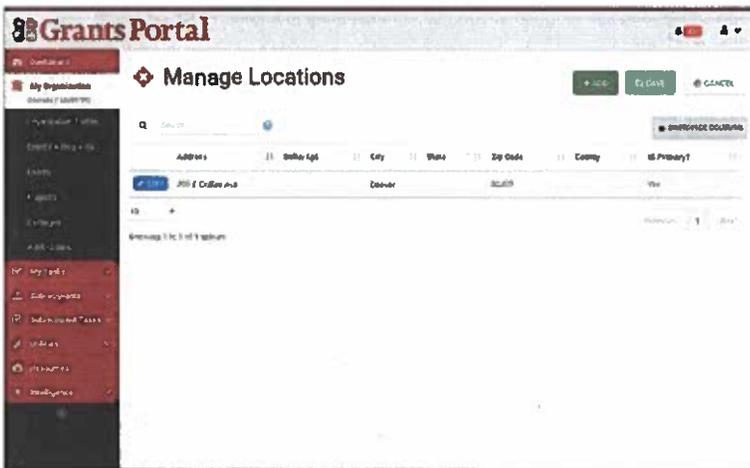
After the Recipient or Applicant selects the "Manage" button, Grants Portal redirects them to the "Manage Locations" page. Here, the Recipient or Applicant edits or adds organization locations.

Directions to edit an organization location:

- Select the "Edit" button next to the address of the location you want to edit

Directions to add an organization location:

- Select the "Add" button in the top-right corner of the screen



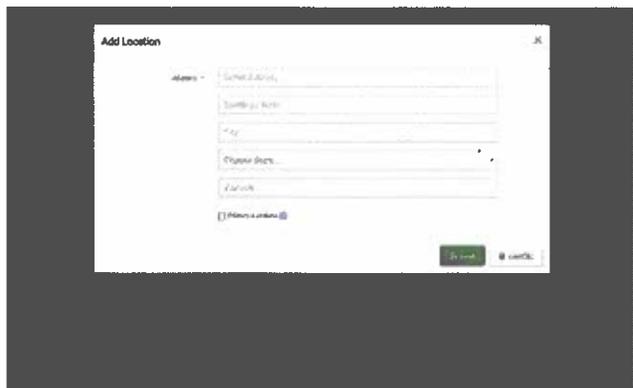
## Editing Your Organization Profile: Manage Locations (3 of 4)

Once the Recipient or Applicant selects the "Edit" button next to their location address or the "Add" button in the top-right corner, a pop-up window appears. The Recipient or Applicant edits or inputs any of the following information within the pop-up window:

- Address
- Secondary Address (e.g., building, suite)
- City
- State
- Zip Code
- County
- Primary Location

Directions to edit or input address information:

- Select the text box next to "Address"
- Delete unwanted information
- Input the correct information



Directions to edit or input secondary address information:

- Select the text box below the address text box
- Delete unwanted information
- Input the correct information for a secondary address

Directions to edit or input city information:

- Select the text box below the secondary address text box
- Delete unwanted information
- Input the correct city

## Editing Your Organization Profile: Manage Locations (4 of 4)

The Recipient or Applicant continues to edit or add organization locations.

Directions to edit or input State information:

- Select the drop-down list for States
- Select the appropriate State

Directions to edit or input zip code information:

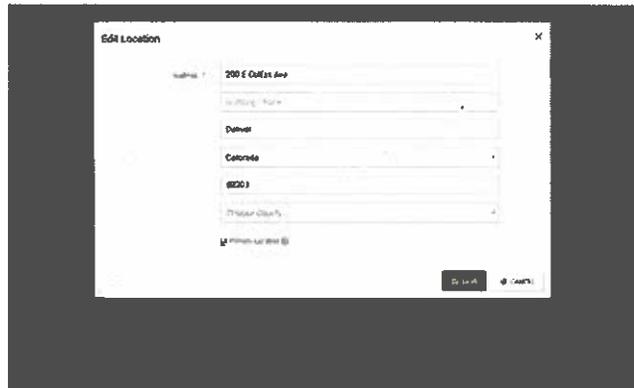
- Select the text box under the State drop-down list
- Delete unwanted information
- Input the correct information

Directions to edit or input "Primary Location" designation:

- Check or uncheck the box next to "Primary Location"

Once the Recipient or Applicant completes all the changes, they select the "Save" button. Grants Portal brings the Recipient or Applicant back to the "Manage Locations" page.

The Recipient or Applicant selects the "Save" button again on the "Manage Locations" page to ensure all changes are made. Upon selecting the "save" button, Grants Portal directs Recipients or Applicants to the "My Organization Profile" screen.



The screenshot shows a modal window titled "Edit Location" with a close button (X) in the top right corner. The form contains the following fields:

- Address: 200 E Colfax Ave
- City: Denver
- State: Colorado
- Zip Code: 80202
- Primary Location:

At the bottom right of the form, there is a "Save" button and a "Cancel" button.

## Manage Locations: Video Example

Use Left/Right Arrow keys to

# Video Demonstration: Editing Your Organization Profile: Manage Locations

This demonstration will show how to edit  
Applicant locations in Grants Portal

There will be no audio in this demonstration

## Editing Your Organization Profile: Uploading Documents (2 of 4)

Once the Recipient or Applicant selects the "Manage" button, Grants Portal directs them to the "Manage Documents" page. The Recipient or Applicant now edits, removes, or uploads their project-specific documentation on this page.

Directions to remove documents:

- Select the "Remove" button next to the document you wish to remove
- Select the "Yes" button when a pop-up window appears asking if you are sure you want to delete the document

Directions to edit documents:

- Select the "Edit" button next to the document

Directions to upload documents:

- Select the "Add Document" button in the top-right corner of the page

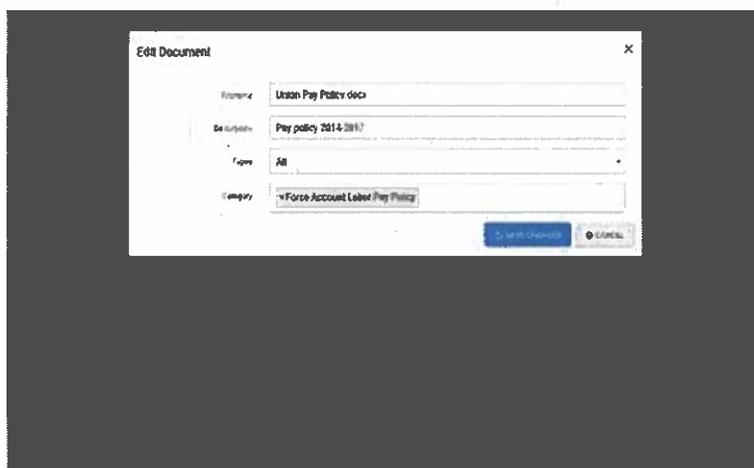
Filename	Description	Size	Category	Upload Date	Uploaded By
gach-100		796 B	Insurance Policy	9/15/2017 8:52 PM	Tygerman, Sara
gach-100		796 B	General Insurance Documents	8/28/2017 11:13 PM	Schaefer, Amy
Hollow (1) of (2) doc		100 B	General Insurance Documents	8/28/2017 11:13 AM	Burns, Yvonne
Hollow (2) of (2) doc		100 B	General Insurance Documents	8/28/2017 11:13 AM	Burns, Yvonne
Hollow (3) of (2) doc		100 B	General Insurance Documents	8/28/2017 11:13 AM	Burns, Yvonne
Hollow (4) of (2) doc		100 B	General Insurance Documents	8/28/2017 11:13 AM	Burns, Yvonne
Hollow (5) of (2) doc		100 B	General Insurance Documents	8/28/2017 11:13 AM	Burns, Yvonne
Hollow (6) of (2) doc		100 B	General Insurance Documents	8/28/2017 11:13 AM	Burns, Yvonne

## Editing Your Organization Profile: Uploading Documents (3 of 4)

When the Recipient or Applicant selects the "Edit" button, a pop-up window appears.

Directions to edit your document:

- Select the text box next to "Filename" and enter the correct name of the file
- Select the text box next to "Description" and enter a description of the document
- Select the drop-down list next to "Types" and select the appropriate type for the document you previously uploaded
- Select the drop-down list box next to "Category" and select the appropriate category for the document
- Select the "X" next to inappropriate categories to delete them
- Select the "Save" button

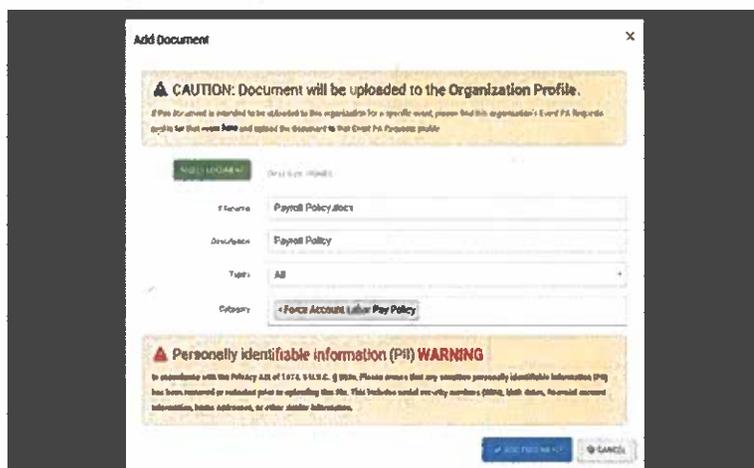


## Editing Your Organization Profile: Uploading Documents (4 of 4)

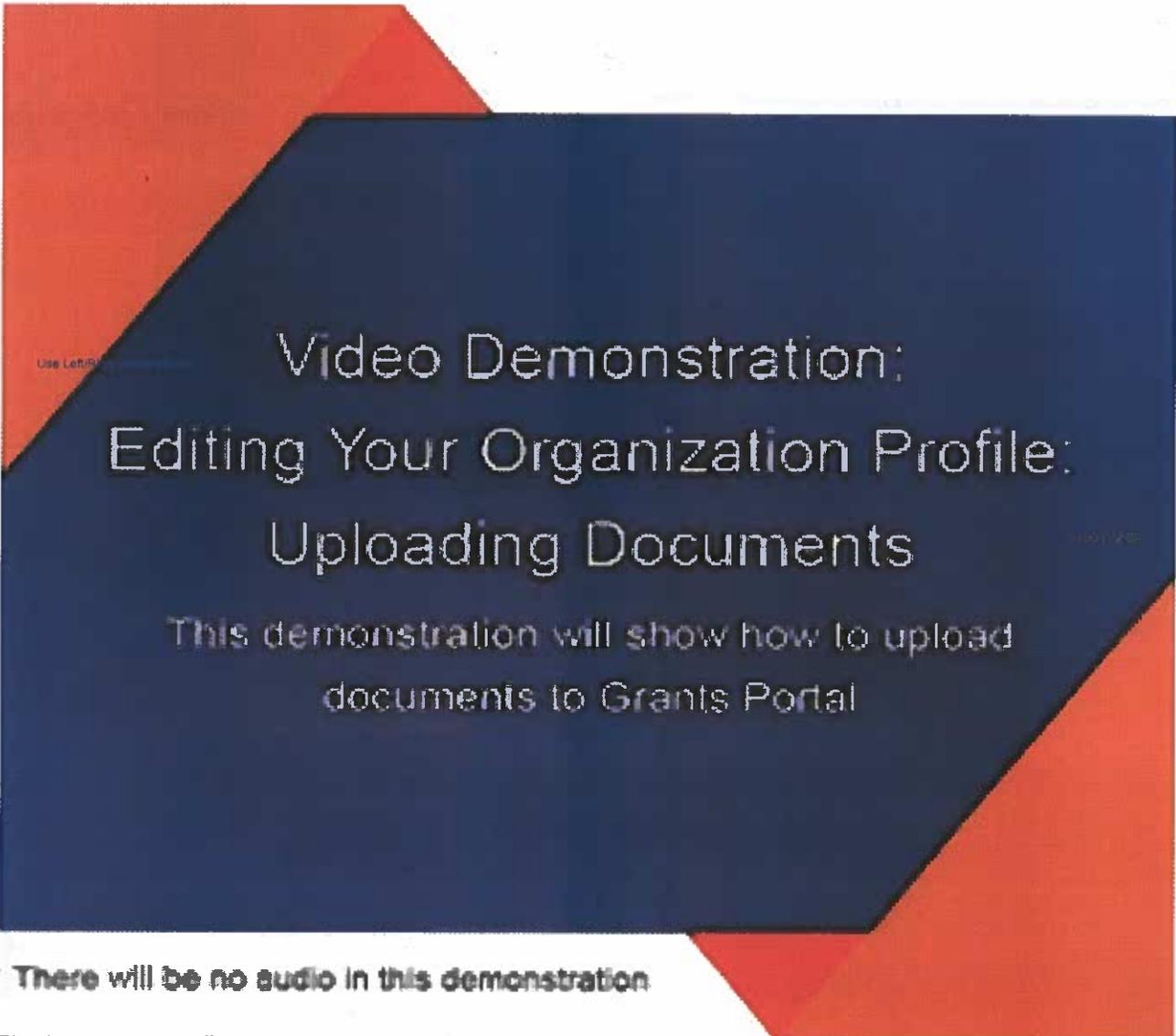
When the Recipient or Applicant selects the "Add Document" button, a pop-up window appears.

Directions to upload a document:

- Select the "Drag and drop a file here" box and choose the appropriate document from the saved location. The user can also drag and drop the appropriate document into the dotted "Document Upload" box
- Select the text box next to "Filename" and enter the correct name of the file
- Select the text box next to "Description" and enter a description of the document
- Select the drop-down list next to "Category Filter" and select the appropriate Category Filter for the document previously uploaded
- Select the drop-down list box next to "Category" and select the appropriate category for the document
- Select the "X" next to inappropriate categories to delete them
- Select the "Save" button



## Uploading Documents: Video Example



# Video Demonstration: Editing Your Organization Profile: Uploading Documents

This demonstration will show how to upload  
documents to Grants Portal

**There will be no audio in this demonstration**

Directions to manage staff roles:

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the "Personnel" drop-down list



## Managing Staff Roles (2 of 4)

Once the Recipient or Applicant selects the "Manage" button, the "Manage Personnel" page loads. On this page, the Recipient or Applicant chooses the person and roles to edit.

Directions to manage staff roles:

- Choose the staff and roles to manage
- Select the "Manage" button to the left of the person's last name



## Managing Staff Roles (3 of 4)

After the Recipient or Applicant selects the "Manage" button, the specific staff's "Manage Personnel" page loads. This screen contains the general information and user information for the staff member. A Recipient or Applicant edits any of the following for the staff on this page:

- General information
- User information
- Contact information
- Roles
- Password reset requests
- Login history

Directions to manage staff roles:

- Select the roles drop-down list
- Select the "Manage" button to the right of the organization roles drop-down list for the staff roles to manage



## Managing Staff Roles (4 of 4)

After the Recipient or Applicant selects the "Manage" button for the staff's organization roles to edit, a pop-up window appears in Grants Portal, with the specific roles the personnel have related to grants management.

The Recipient or Applicant edits the staff's role by checking and unchecking boxes next to the roles the staff should have in Grants Portal. Staff can have multiple roles in Grants Portal.

If a Recipient or Applicant has any questions about the responsibilities and abilities a role provides to a staff member in Grants Portal, place the cursor over the question mark to the right of the role, and Grants Portal informs them.

Directions to manage staff roles:

- Select and unselect check-boxes for the roles the staff member should or should not undertake
- Select the "Save" button



## Managing Staff Roles: Video Example

# Video Demonstration: Managing Staff Roles

This demonstration will show how to  
manage staff roles in Grants Portal

There will be no audio in this demonstration

Please watch the video to review how to manage staff roles.

## Managing Staff Contact Information (1 of 4)

Recipients and Applicants have the option to manage contact information for the personnel they invite to use Grants Portal and who are affiliated with their organization. Recipients and Applicants use this function in case a staff member cannot.

To manage staff roles, the Recipient or Applicant must sign in to Grants Portal and navigate to the "Manage Personnel" page.

Directions to manage staff contact information:

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the "Personnel" drop-down list



## Managing Staff Contact Information (2 of 4)

Once the Recipient or Applicant selects the "Manage" button, the "Manage Personnel" page loads. On this page, the Recipient or Applicant chooses a person on their staff with the roles they want to edit.

Directions to manage staff contact information:

- Choose the staff and roles to manage
- Select the "Manage" button to the left of the person's last name



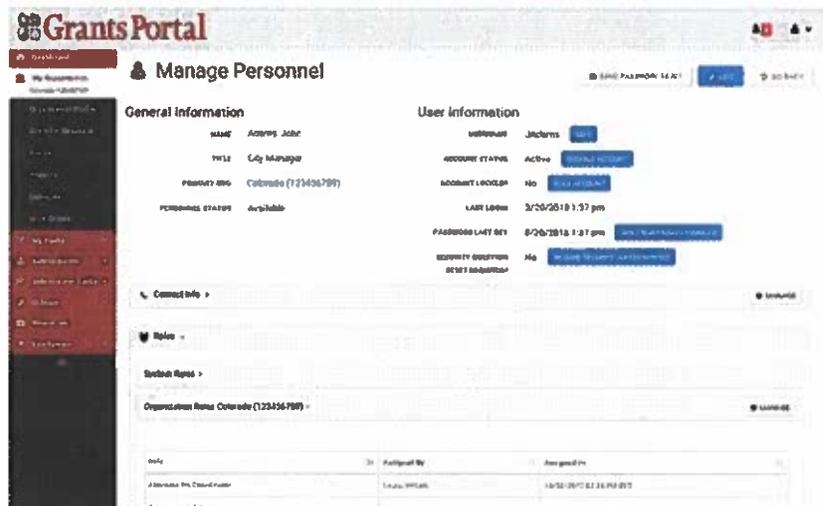
## Managing Staff Contact Information (3 of 4)

After the Recipient or Applicant selects the "Manage" button, the specific staff's "Manage Personnel" page loads. This screen contains the general information and user information for the staff member. A Recipient or Applicant can edit any of the following for the staff on this page:

- General information
- User information
- Contact information
- Roles
- Password reset requests

Directions to manage staff contact information:

- Select the "Manage" button to the right of the contact information drop-down list



## Managing Staff Contact Information (4 of 4)

Once the Recipient or Applicant selects the "Manage" button, Grants Portal loads the "Personnel Details" page. The Recipient or Applicant adds, edits, and removes phone numbers and email addresses linked to the staff member.

Directions to manage staff contact information:

- Select the "Edit" button under "Phone Numbers" to edit the staff member's phone number
- Select the "Remove" button under "Phone Numbers" to remove the staff member's phone number
- Select the "Add Phone Number" button, to add a phone number for the contact
- Select the "Edit" button under "Email Addresses", to edit the staff member's email address

- Select the "Remove" button under "Email Addresses", to remove the staff member's email address
- Select the "Add Email Addresses" button, to add an email address for the contact



## Managing Staff Contact Information: Video Example

# Video Demonstration: Managing Staff Contact Information

This demonstration will show how to  
manage staff contact information in  
Grants Portal

**There will be no audio in this demonstration**

00:00 | 03:24

Please watch the video to review how to manage staff's contact information.

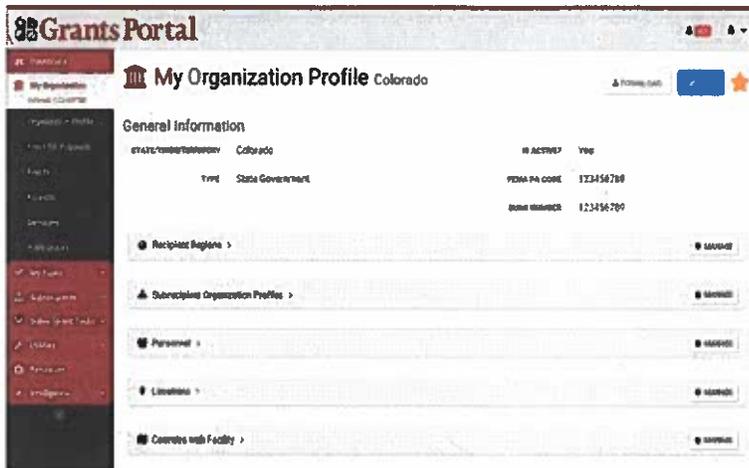
## Managing Staff Login Information (1 of 3)

Recipients and Applicants have the option to manage staff login information of the personnel they invite to use Grants Portal and who are affiliated with their organization. Recipients and Applicants use this function in case a staff member forgets their password or gets locked out of their account.

In order to manage staff login information, the Recipient or Applicant must sign in to Grants Portal and navigate to the "Manage Personnel" page.

Directions to manage staff login information:

- Sign in to Grants Portal
- Select the "My Organization" tab on the left side of Grants Portal
- Select the "Organization Profile" tab under "My Organization"
- Select the "Manage" button to the right of the "Personnel" drop-down list



## Managing Staff Login Information (2 of 3)

Once the Recipient or Applicant selects the "Manage" button, the "Manage Personnel" page loads. On this page, the Recipient or Applicant chooses which person to manage login information for.

Directions to manage staff login information:

- Choose the staff login to manage
- Select the "Manage" button to the left of the person's last name



## Managing Staff Login Information (3 of 3)

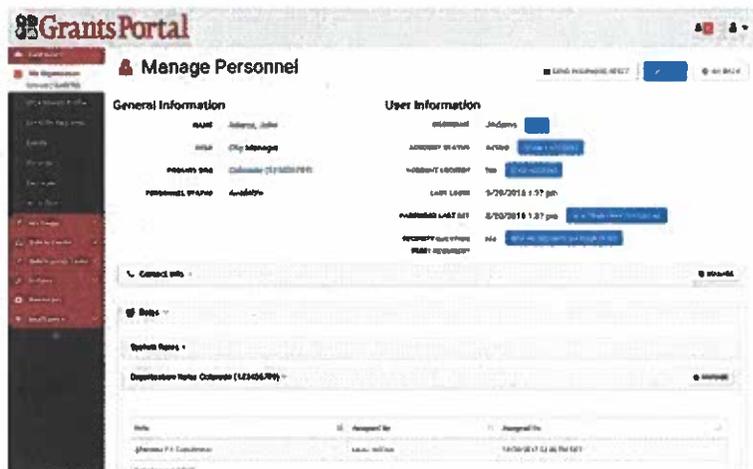
After the Recipient or Applicant selects the "Manage" button, the specific staff's "Manage Personnel" page loads. This screen contains the general information and user information for the staff member. A Recipient or Applicant edits any of the following for the staff on this page:

- General information
- User information
- Contact information
- Roles
- Password reset requests

Under "User Information," a Recipient or Applicant resets the staff member's password by sending them a temporary password.

Directions to manage staff login information:

- Select the "Send Temporary Password" button under "User Information"



## Managing Staff Login Information: Video Example

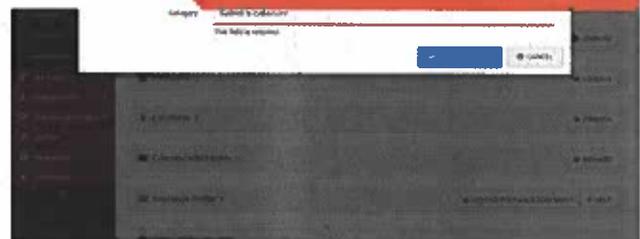
Use Left/Right Arrow keys to

# Video Demonstration: Managing Staff Login Information

This demonstration will show how to  
manage staff login information in  
Grants Portal

**There will be no audio in this demonstration**

- Select the "Select Document" button
- Navigate to the appropriate document from the saved location and select "Open"
- Select the text box next to "Filename" and enter the name of the file
- Select the text box next to "Description" and provide an accurate short description of the document
- Select the category drop-down list and select the accurate category that represents the insurance document
- Select the "Add Document" button



The screenshot shows a web form for adding a document. At the top, there is a "Select Document" button. Below it, there is a "The file name:" label followed by a text input field and an "Add" button. Underneath, there is a "Category:" label followed by a dropdown menu. The dropdown menu is open, showing several categories: "All Documents", "All Insurance Documents", and "All Insurance Policies". At the bottom right of the form, there is an "Add Document" button.

## Uploading Insurance Documents: Video Example