



# Enterprise Grants Management System (EGMS) Training and Networking Event

June 26, 2019 | Tara Dewan-Czarnecki



# Agenda

- Welcome and Introductions
- Enterprise Grants Management System (EGMS) Overview
- Registering as a Vendor/User
- Completing Central Data
- Navigating EGMS
- EGMS Tips
- Grant Administration



# EGMS Overview



**Enterprise Grants Management System**

- DC Government grant-management system for application and grants management
- Link: <http://grants.osse.dc.gov>
- Registration is a one-time event
- EGMS training guides and videos:  
<http://grants.osse.dc.gov/info/training>
- Vendor and user credential guide:  
<http://grants.osse.dc.gov/info/credentials>



# Registering as a Vendor/User

- **Step 1: Register:** You will need your organization's Federal Employee Identification Number (FEIN).

## EGMS REGISTRATION

For both New Vendor and New User requests the first few steps are the same.

Username/Email

Password [Forgot Password](#)

**LOGIN**

[New User](#)

- In your browser window, type the following: [grants.osse.dc.gov](https://grants.osse.dc.gov).
- Click on the **New User** link.
- A pop-up will appear requesting the Federal Employee Identification Number (FEIN). The FEIN will be used to pull the vendor information if already registered, or activate New Vendor registration fields.
- Input the FEIN and click **Search**.
  - Please note: if your organization is a local District government agency the FEIN may be **#536001131**, multiple organizations in the district use this number. If this is your number please contact the help desk [(202) 719-6500 or [osse.callcenter@dc.gov](mailto:osse.callcenter@dc.gov)] for both New Vendor and New User requests.

**NEW VENDOR REQUEST**

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Prior to processing a new vendor request an **IRS W-9** form needs to be completed and uploaded to the GMS. A link to the form can be found [here](#).

Prior to processing a new vendor request a **Master Collection Forms (MCF)** document also needs to be completed and uploaded to the GMS.

**BROWSE W-9**



# Registering as a Vendor/User

- **Step 2:** EGMS will determine if you are a new vendor or a new user.
  - a. New vendor: Organization and user are new to EGMS.

## NEW VENDOR

Upon entering the FEIN and clicking **Search** if the organization is not already registered as a vendor the system will return the following message:

"Unable to find an organization with the provided search criteria. If you would like to request a new organization be added to the GMS, click the request button."

- Recheck the FEIN to ensure it is correct.
  - If incorrect, input the correct FEIN.
- Click the **Request** button.
  - Additional fields open for the NEW VENDOR REQUEST.

- b. New user: Organization is registered but individual entering information does not have EGMS credentials.

### NEW USER

Actions in EGMS require specific roles. Users will request credentials through the NEW USER REQUEST.

Upon entering the FEIN and clicking **Search** if the organization is already registered as a vendor the system will display the name of the organization return the following message:

"Unable to find any local security admins with the provided search criteria. If you would like to request a new organization be added to the GMS, click the request button."

**NEW USER**

It may take up to 60 hours to complete the setup of New Users - New Admins.

In order to confirm if your LEAC/BO is already registered in the GMS, please enter the FEIN of your organization and click search.

FEIN:  **SEARCH**

Test DC District

Unable to find any local security admins with the provided search criteria. If you would like to request a login to the GMS, click the request button.

**REQUEST** **CLOSE**

- Click the **Request** button.
  - Additional fields open for the NEW USER REQUEST.
- Input:
  - First Name
  - Last Name
  - Email
- Select the role:
  - View Only: users are able to view all data but are unable to make edits or changes.
  - Data Entry: users are able to create applications, reimbursement requests, and may save data. Data Entry users are unable to submit applications or reimbursement requests.
  - Authorized Rep: users have all the functions of the above roles and are able to agree to assurances and submit applications and reimbursement requests. Users must be an employee of the organization and not a third-party vendor.
    - Authorized Representative requests should come from leaders at an organization. This person's name should appear on the organization's website. If this is not the case, OSSE will request an email confirmation from a leader in the organization to approve the role.
- Confirm all the information is correct.
- Click the **Submit** button.
- Please note the request may take up to 2 business days to complete. Please plan appropriately.



# Registering as a Vendor/User

- **Step 3:** Once your organization is registered and you have credentials, determine who else in your organization needs access to EGMS.
- **EGMS roles:**
  - View only: Users are able to view all data but are unable to make edits or changes.
  - Data entry:
    - Users are able to create applications, reimbursement requests and may save data.
    - Users are unable to submit applications or reimbursement requests.
  - Authorized representative:
    - Users have all the functions of the above roles and are able to agree to assurances and submit applications and reimbursement requests.
    - Users must be an employee of the organization and not a third-party vendor.
    - Authorized representative requests should come from leaders at an organization.
    - This person's name should appear on the organization's website. If not, OSSE will request an email from a leader in the organization to approve the role.



# Registering as a Vendor/User

- **Step 3** (continuation):
  - You can also contact the EGMS help desk to determine who currently has credentials at your organization or to add additional users.
    - Contact the help desk at [osse.callcenter@dc.gov](mailto:osse.callcenter@dc.gov) or (202) 719-6500.
    - Requests for determining who has existing credentials must come from an authorized representative.
  - Important links for registration:
    - FEIN: <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-online>
    - DUNS: <http://fedgov.dnb.com/webform/displayHomePage.do>
    - System for Award Management (SAM): <https://www.sam.gov/SAM/>
  - Note: If awarded, the grant monitor will share a master supplier form and W-9. They are not needed at the time of application.



# Completing Central Data

- **Step 4:** You will need a SAM expiration data and DUNS number for this step.
  - Central data captures information common to the applicant's organization across all grant programs.
  - It must be completed annually by any organization wishing to apply for a grant within EGMS.
  - It should be completed and submitted to OSSE prior to completing the first grant application.
  - The authorized representative must be the user to accept/submit the central data.



# Completing Central Data

- **Step 4** (continuation):
  - What do you need?
    - Contact information for your organization’s “central contacts;”
    - A DUNS number and SAM expiration date; and
    - A current copy of your organization’s “entity overview” record from SAM.gov.
  - Tips on document uploads: Save in DOCX, DOC, XLSX, XLS, PDF; file must be less than 6 MB; do not use special characters in the file name.
  - Review certifications and assurances, click “legal entity agrees.”  
Navigate to the “submit” tab.
  - Run a “consistency check.”
  - If no errors exist, the blue “submit” button will then appear. Click “submit.”



# Completing Central Data

The application has been submitted. No more updates will be saved for the application.

OVERVIEW

CENTRAL CONTACTS

DUNS NUMBER

CERTIFICATIONS  
AND ASSURANCES

ALLOCATIONS AND  
FUNDING SUMMARY

SUBMIT

CENTRAL DATA  
HISTORY

CENTRAL DATA  
PRINT

## Central Data Overview

### Purpose:

The Central Data Collection is designed to capture information that applies across multiple funding applications and other collections for each LEA / CBO or other applicants throughout the Fiscal Year.

Common Assurances must be agreed to by ANY applicant that wishes to submit one or more Funding Applications within this Fiscal Year to OSSE. Such assurances are located within Central Data so that each applicant need only complete these in one location, rather than in multiple applications during the year. Additional Assurances that are specific to one program may also be required within their respective Funding Application.

Local Education Agencies completing the ESEA Consolidated Application (ConApp) or the IDEA Part B Consolidated Application MUST also complete Assurances specific to those programs in order to achieve Substantially Approved status and to be allowed to begin obligating funds starting on July 1st of each year. Failure to complete these separate assurances will result in rejection of Reimbursement Requests for expenditures that occurred prior to the acceptance of these assurances.

### General Information:

Funding Applications cannot be budgeted until Central Data is completed. If assistance is required to complete the Central Data collection, please contact the Office of the State Superintendent of Education, Office of Grants Management and Compliance by email at [osse.egmssupport@dc.gov](mailto:osse.egmssupport@dc.gov).



# Completing Central Data

PROGRAM SPECIFIC  
ASSURANCES

ORGANIZATION  
SPECIFIC  
ASSURANCES

ASSURANCES  
AGREEMENT

## Assurances

The authorized representative of the applicant certifies that he or she has read, understood and will comply with all of the provisions of the following assurances.

NOTE: These checkboxes will be automatically filled in as each of the separate certifications/assurances are read and agreed to.

8/14/2018 Central Data Collection Common Assurances - Common Assurances are agreed to in the Central Data Collection. These 21st Century specific assurances may not be agreed to unless the Common Assurances have previously been agreed to.

- Program Specific Assurances
- Organization Specific Assurances

The assurances were fully agreed to on this date:

LEGAL ENTITY AGREES



# Navigating EGMS

- **Step 5:** Familiarize yourself with EGMS in advance of the grant application opening.
  - Once you log in, you will see your main grant dashboard.
  - Please see example below:

**EGMS** Enterprise Grants Management System

District of Columbia Office of the State Superintendent of Education

Click to Return to Organization Selection | Click to Return to Menu List / Sign Out

Enterprise Grants Management System -- Access Select

106 Booker T. Washington PCS [Click for Instructions](#)

Select Fiscal Year: 2020 [Click to view Funding Summary](#)

**Created**

Assurances and Central Data

Application Name	Revision	Status	Date	Actions
Central Data	Original Application	Final Approved	4/12/2019	OPEN REVIEW SUMMARY

Formula Grant

There currently aren't any Formula Grant applications created.

Competitive Grant

Application Name	Revision	Status	Date	Actions
21st Century	Original Application	Final Approved View GAN	5/1/2019	OPEN PAYMENTS
SAT and ACT Preparation Expansion Grant	Original Application	Final Approved View GAN	5/2/2019	OPEN PAYMENTS

Continuation Grant

There currently aren't any Continuation Grant applications created.



# Navigating EGMS

- **Step 5 (continuation):** Familiarize yourself with EGMS in advance of the grant application opening.

The screenshot displays the EGMS interface. At the top, a blue header bar contains a dropdown menu labeled "Available", which is circled in red. Below this, a section titled "Assurances and Central Data" features a blue message bar stating "There currently aren't any Assurances and Central Data applications available." The main content area is divided into three sections: "Formula Grant", "Competitive Grant", and "Continuation Grant". Under "Formula Grant", there is one entry: "HIV-STD Prevention and PE" with a submission deadline of "9/30/2018". Under "Competitive Grant", there are five entries: "DC Career Academy Network" (1/15/2019), "DC School Garden Grant" (9/30/2018), "EC-Child Development Associate" (9/30/2018), "WNS Farm Field Trip Program" (9/30/2018), and "WNS\_Community\_Schools" (9/30/2018). A blue "CREATE" button, also circled in red, is located on the right side of the interface. The "Continuation Grant" section is partially visible at the bottom.

Grant Type	Grant Name	Submission Deadline
Formula Grant	HIV-STD Prevention and PE	9/30/2018
Competitive Grant	DC Career Academy Network	1/15/2019
	DC School Garden Grant	9/30/2018
	EC-Child Development Associate	9/30/2018
	WNS Farm Field Trip Program	9/30/2018
	WNS_Community_Schools	9/30/2018
Continuation Grant		



# Navigating EGMS

**Submitting to OSSE:** The submit tab has a few components.

1. First click the “consistency check” and this will alert you to any errors you have that are holding up the application.
2. Then click “lock application” and the “submit” button will appear.
3. Then click “submit.”

Application: 2017-2018 Access to QCC Expansion - 00-  
Cycle: Original Application [Printer-Friendly](#)  
[Click to Return to GMS Access/Select Page](#)  
[Click to Return to Menu List / Sign Out](#)

OVERVIEW CONTACT INFORMATION FUNDING DISTRIBUTION PROGRAM INFORMATION DETAILED PLANNED EXPENDITURES ASSURANCES SUBMIT APPLICATION HISTORY APPLICATION PRINT

Submit

**The application has been submitted for review.**

**CONSISTENCY CHECK** **LOCK APPLICATION** **UNLOCK APPLICATION**

Assurances	10/19/2017
Consistency Check was run on:	10/19/2017
Organization Data Entry	
Organization Administrator submitted the application to OSSE on:	10/19/2017
Grant Administrator	
Grant Admin - Final Review	



# Navigating EGMS

- On the main dashboard, you will see grants grouped by “created” and “available.” Within these two categories, you will also see:
  - Assurances and central data.
  - Formula grant: Grants for which only particular organizations are eligible. Grant amount usually based on a “per student” formula.
  - Competitive grant: Grants with a request for application (RFA) that are being competitively bid out and awarded.
  - Continuation grant: Grants continuing to existing grantees under a multiple year grant.
- Any available grant applications and central data will start under “available” until you click the blue button, “create.” After that point, they will move to “created.” You will click “open” to open and edit your application.
- If the RFA has not yet been posted for the competitive grant for which you are applying, it will not appear yet in “available.” You can still complete central data during this time.



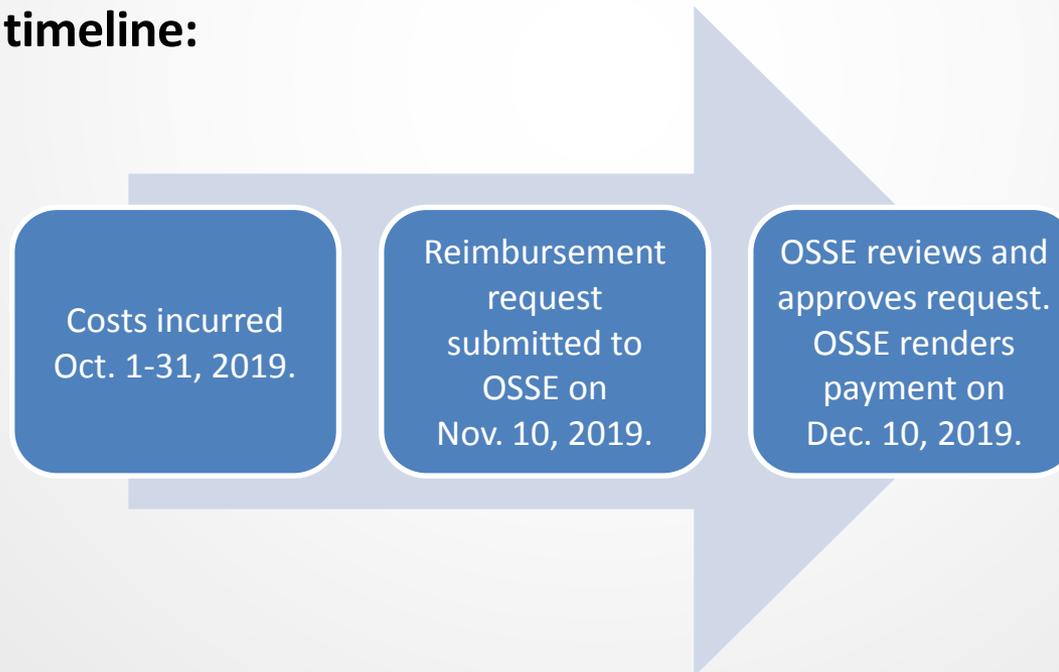
# EGMS Tips

- Save early and often: EGMS times out after 60 minutes of inactivity.
- Printing: If you would like to print the application, go to the “application print” tab. The application will be available for you to print at the top of each hour.
- Start and submit early: Avoid last-minute technical submission issues by submitting early to ensure there is time to address issues if they arise. Grants are due at 3 p.m. on the submission date.
- Narrative responses may not exceed the stated character limit. If you cut and paste from a Word document, double-check that final sentences/paragraphs are not cut off.
- Tips on document uploads: Save in DOCX, DOC, XLSX, XLS, PDF; file must be less than 6 MB; do not use special characters in the file name.
- Contact the EGMS help center: [OSSE.CallCenter@dc.gov](mailto:OSSE.CallCenter@dc.gov) (202) 719-6500; available Monday-Friday from 7:30 a.m.-5:30 p.m.
- Note: A record of contact with EGMS will not excuse missing the review submission deadline.



# Grant Administration

- **OSSE grants are cost reimbursable.** Grantees incur costs and then submit a request for reimbursement of funds along with necessary supporting documentation.
- **DC Government payments proceed according to the 30-day quick payment act.** Payments are rendered 30 days from the submission of the final, correct request.
- **Sample timeline:**





# Contact Information

## FIND US

### ADDRESS:

1050 First St. NE  
Washington, DC 20002

### POC:

OSSE Customer Service  
[osse.callcenter@dc.gov](mailto:osse.callcenter@dc.gov)  
202-719-6500

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 [www.osse.dc.gov](http://www.osse.dc.gov)



Q&A