

Grantee Instructions on Navigating WebGrants

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Submitting a Self-Assessment Report (SAR)

- Login to WebGrants at <http://grants.tajf.org>.
- From the Main Menu, go to *My Grants* and select **20XX SAR** from the list.
- From the list of components, chose *Status Reports*:

Grant Components

The components below are associated with the current Funding Opportunity. You may associate specific forms in the Associated Forms section above this grant and you can export the raw data.

Component
General Information
Status Reports
Opportunity

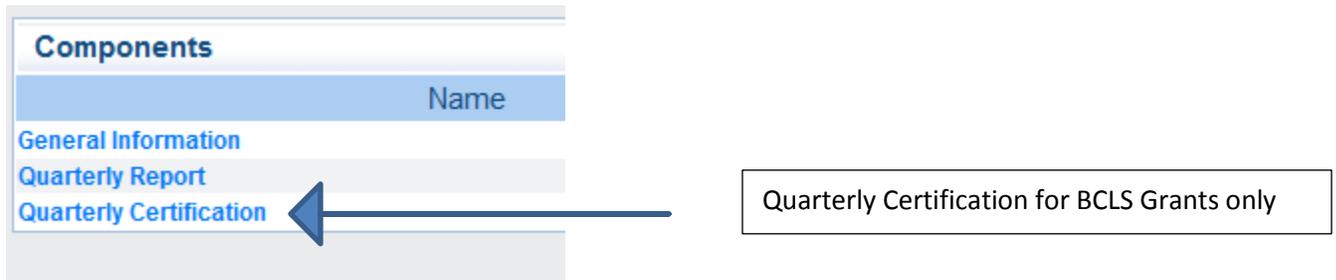
- Select the status report ending in ‘20XX SAR-01’ to access all forms.

Components Preview Submit		
<i>Complete each component of the status report and mark it as complete. Click Submit when you are done.</i>		
Name	Complete?	Last Edited
General Information	✓	
Executive Summary		
Cover Sheet		
Governing Body		
Funded Activities Pt. 1		
Funded Activities Pt. 2		
Success Story		
Annual Closed Case Summary Report		
Client Profile		
Cases Closed by County		
Open Cases by County		
Self Represented		
Major Benefits		
Legal Services In-House Staffing		
Volunteer Statistics		
Benefits From Legal Representation		
Dollar Outcomes		
Financial Report		
Sources of Funding for Legal Services Activities		
Number of Legal Cases Closed		

- Within a component, you may need to select *Edit* in the top right to open data fields. Once you complete each form, be sure to *Save* and *Mark as Complete*. You must mark all components as complete in order to *Submit* your report.
- You may complete one component at a time within your SAR. You must fill all fields within a component before saving it.

Submitting Quarterly Reports

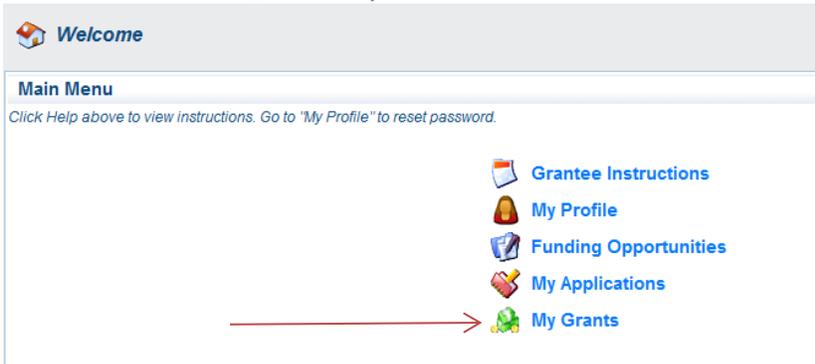
- Log in. From the Main Menu, go to [My Grants](#) and chose the appropriate grant by clicking on its name.
- Click on the [Status Report](#) component.
- Select the quarterly report that has been scheduled for you.
IMPORTANT!!! Do not add a new report to the list. I will schedule quarterly reports for subsequent quarters.
- Complete each component within the quarterly report. **BCLS grants have a quarterly certification,** and **CVCLS grants have programmatic** components. You may need to select [Edit](#) on the top right to open fields.
- In the [Quarterly Report](#) component, **enter expenditures.** Even if you have no expenditures for the period, you need to [Save](#) the form. **Remember,** do not report spending more than you have received so far for the grant year.



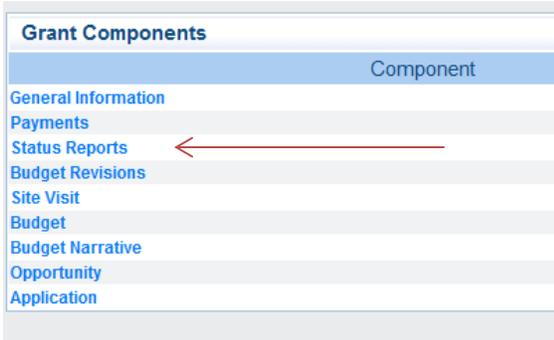
- For **carryover grants**, select the appropriate grant, and [Add](#) a status report. Include the *Report Period* and *Type, Quarter 5 Carryover Expenditure Report*.
- After reviewing each component, [Mark as Complete](#) and [Go to Status Report Forms](#).
- Review the report by selecting [Preview](#), then [Submit](#).

Submitting a Carryover Request

From the *Main Menu*, select *My Grants*.



Choose the appropriate grant and select *Status Reports* from the list of components.



Select *+Add* in the top right to add a *Carryover Request* status report. Leave *Report Period* blank and be sure to select *Carryover Request* as the status report type.

From the list of components, select *Budget Carryover Request* to input data. ****Remember, if you are unable to input data into the fields, click on *Edit* in the top right.** Once you select *Save* in the top right, two columns with totals will appear. If you need to edit fields, simply select *Edit*.

Complete *Budget Narrative* Component and *Mark as Complete*.

After reviewing components, ensure each has a checkmark in the *Complete* column, and select *Preview & Submit*.

Submitting Reason-not-Accepted (RNA) Report through WebGrants

From the *Main Menu*, go to *My Grants*.

Menu |
 Help |
 Log Out

 Back |
 Print |
 Add |
 Delete |
 Edit |
 Save

Welcome

Main Menu
 Click Help above to view instructions. Go to "My Profile" to reset password.

- Instructions
- My Profile
- Funding Opportunities
- My Applications
- My Grants ←

From the list of current grants, select title *RNA Report*.

Choose *Status Reports* and select status report ending in **01** (for example, ABC--RNA-01) with due date 12/15/2012.

Grant Components

The components below are associated with the current Funding Opportunity. You can change these components. You may associate specific forms in the Associated Forms section above. You can define your own alerts for this grant and you can export the raw data.

Component
General Information
Status Reports ←
Opportunity

Do NOT Add a new report. The system schedules subsequent reports each month.

From the list of components, select *RNA Report*.

Components Preview | Submit

Complete each component of the status report and mark it as complete. Click Submit when you are done.

Name	Complete?	Last Edited
General Information		
RNA Report ←		

If you are not able to enter values into fields, simply click *Edit* in the top right.

Once you complete the form, be sure the *Save* it.

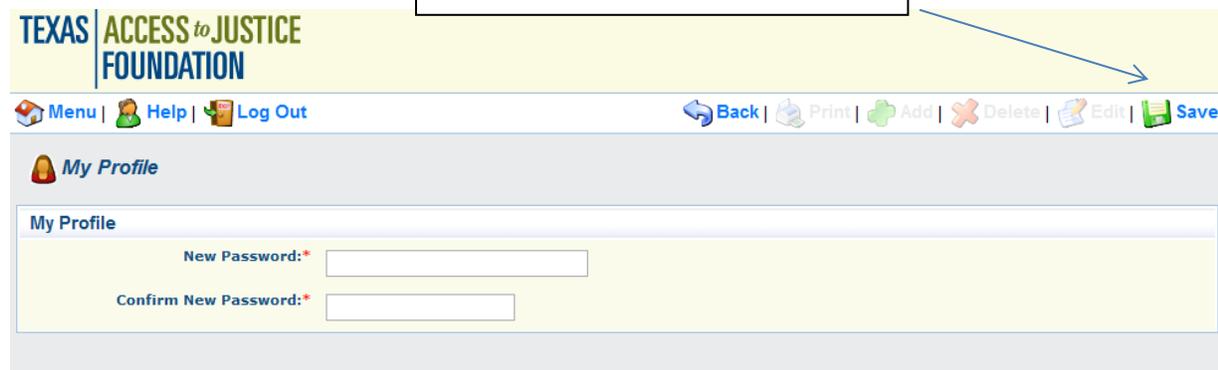
Review the form and *Mark as Complete*.

Submit your report from the *Components* screen by the due date.

Register for Grants System

- Click on the [Register Here](#) link, unless you are already registered.
- Complete all information including the Executive Director and Board Chair fields.
- Click on the [Register](#) link.
- Once registration is approved, you will receive an email containing your username and temporary password.
- To change your password, log in, go to [My Profile](#) in the main menu, and click on [the Reset Password](#) link.

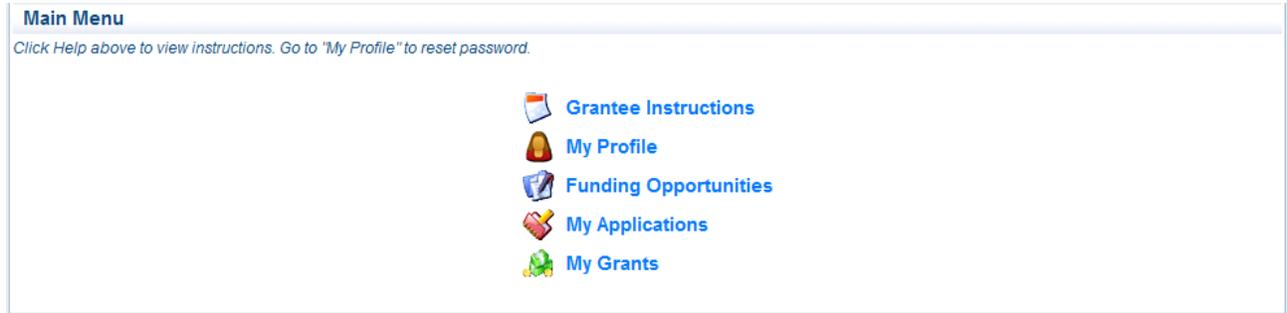
Be sure to [Save](#) your new password.



The screenshot shows the 'My Profile' page of the Texas Access to Justice Foundation. At the top, there is a navigation bar with 'Menu | Help | Log Out' on the left and 'Back | Print | Add | Delete | Edit | Save' on the right. Below the navigation bar, the page title is 'My Profile'. The main content area contains two input fields: 'New Password:*' and 'Confirm New Password:*'. A callout box with an arrow points to the 'Save' button in the navigation bar, with the text 'Be sure to Save your new password.'

Apply for Grant

- From the main menu, click on [Funding Opportunities](#).



- Select the appropriate [Opportunity Title](#).
- In the upper right hand corner, select [Start a New Application](#).

Opportunity Details [Copy Existing Application](#) | [Start a New Application](#)

- The link [Copy Existing Application](#) can be used in subsequent applications if you change applicable information with each application.
- Do not change the information populated in the *General Information* component. Simply click [Save](#).
- On the next screen, click on [Go to Application Forms](#).
- You will need to complete each component before submitting, including those for new applicants. You can preview your application at any time.
- Complete all questions in each component and click [Save](#) in the top right. You may paste from an existing document by selecting Ctrl-v on your keyboard.
- If you need to go back and edit this component, click [Edit](#).

Application

*IOLTA Low Income--2011-2012

Project Title: *IOLTA Low Income--2011-2012

Program Area: Interest on Lawyers Trust Accounts (IOLTA) - Low Income Population

Proposal Deadline: Accepted on a Continual Basis

Instructions

To paste a selection, press Ctrl-v.

Recent Changes and Accomplishments

[Mark as Complete](#) |
 [Go to Application Forms](#)

Changes in Organization*

Please highlight any material changes in your organization throughout the previous grant year and include any material changes in your legal services program for this year.

Your response here

Snapshot of Accomplishments in your Legal Services Program*

Summarize your organizations most significant achievement(s) in the previous year. Include

- Numbers of people who benefited;
- Policies or procedures changed to benefit the low-income community;
- Improvements in the administration of justice for the poor;

Your response here

Outcomes*

Discuss, elaborate or highlight some of your outcomes (reported in your last Self Assessment Report)- Provide in Bullet Points

- Extended Representation Outcomes
- Brief Representation Benefits (Including Advice & Counsel)
- Dollar Benefits Achieved for Clients

Your response here

- Click [Mark as Complete](#) to return to the list of components.
- Proceed to the next component until all are complete. If you're unable to [Save](#) and [Mark as Complete](#), select the [Edit](#) button on the top right, [Save](#), and try again.
- Before [Submitting](#) your application, [Preview](#) it.

Application Forms		Preview Submit	
	Form Name	Complete?	Last Edited
General Information		✓	12/21/2011

How to request a budget revision

To request a budget revision, contact TAJF via email with a brief narrative indicating your need for a budget revision. You will then be able to revise your budget in WebGrants. The request must fully delineate the reasons for the request, why it is necessary, and its effect on the grantee. TAJF may request additional information. Remember, you may not spend money in unapproved line items or for unapproved amounts. For more information see [Sample Request for Budget Revision Template](#).

Once you receive approval to revise your budget, your budget and budget narrative will open for editing. From the [Main Menu](#), select [My Grants](#) and select the appropriate grant.

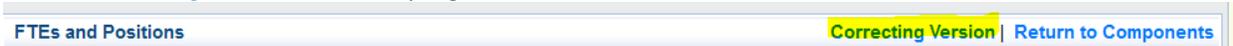
-  [Instructions](#)
-  [My Profile](#)
-  [Funding Opportunities](#)
-  [My Applications](#)
-  [My Grants](#)

From the list of [Grant Components](#), select [Budget](#) and [Budget Narrative](#) at separate times.



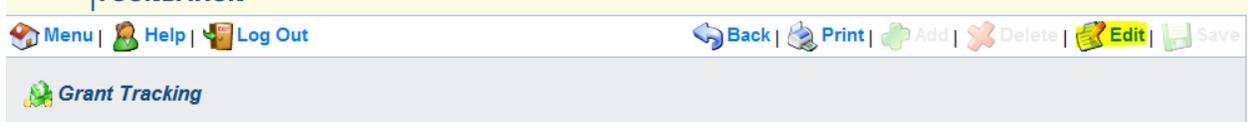
The screenshot shows a vertical menu titled "Grant Components". Below the title is a sub-header "You can define your own alerts". The menu items are: "General Information", "Signed Grant Agreement", "Correspondence", "Budget", "Budget Narrative", "Status Reports", "Budget Revisions", "Opportunity", and "Application". The "Budget" and "Budget Narrative" items are highlighted with a yellow background.

Select [Correcting Version](#) at the top right.

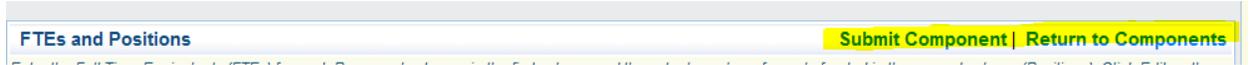


The screenshot shows a horizontal navigation bar. On the left, it says "FTEs and Positions". On the right, there are two buttons: "Correcting Version" (highlighted in yellow) and "Return to Components".

Click [Edit](#) to make changes to the budget and narrative.



Once you make necessary changes, click [Submit Component](#) and [Return to Components](#).



Notify TAJF once you have submitted both your budget and budget narrative.