



Guide to Accessing New & Existing Grants

Last Updated 7/8/2019

Overview

The following guide is intended to help WISEgrants Users and WISEgrants Administrators navigate common issues when accessing a newly added grant application in WISEgrants.

Many of these common login issues are also covered in the [Accessing WISEgrants FAQ](#) and the [WISEgrants Login Worksheet](#).

WISEgrants Application Security Manager - Adding New Users through Secure Home

Users who need access to WISEgrants must first create a [WAMS ID](#). Once the user has a WAMS ID, they can work with their agency's WISEgrants Application Security Manager to get access to roles within WISEgrants as either a [WISEgrants Administrator](#) or a [WISEgrants User](#). The agency WISEgrants Application Security Manager will need to follow these steps from DPI's Customer Service Team:

1. The agency's WISEgrants Application Security Manager logs in to [Secure Home](#).
2. Hover your mouse over "Manage Security" on the blue menu bar for a list of dropdown selections.
3. Click on "Assign an Application User to an application role."
4. If you are an Application Administrator for more than one application, click on the "Application" dropdown field and select the application you want to assign a user and role.
5. Click on "Search Users" and fill in a minimum of four characters total in any field(s) listed to find and choose a WAMS user you want to assign as an Application User.
6. If there is more than one WAMS user for the search criteria entered, click on the radio button next to the WAMS user from the list displayed.
7. Click on the "Role" dropdown field and select from the available application roles the role you want to assign to the user selected – **Available roles in WISEgrants are [WISEgrants Administrator](#) or [WISEgrants User](#).**
8. Click on the check box(es) next to the school(s) to add for the user and role combination. Note: Only one school can be assigned to each user and role combination. The display will not allow you to select a school that is already assigned for this user.
9. Click on the "Next" button.

10. Review the confirmation page that is displayed to verify the user, role and school(s) to be added.
11. If you do not want to send an email notification to the user you want to add, uncheck the checkbox next to the "Notify user by email."
12. If you are sending an email notification to the user and want to carbon copy one other person, type the email address of the other person in the "Optional CC:" field.
13. Click on the "OK" button.
14. The successful completion pop up is displayed and click on the "Close" button.

Grant Edit and View Access

By default WISEgrants will provide WISEgrants Users and Administrators with "View Only" access to the new grant applications. In order to save within the Application/Budgeting or Claiming Areas, a **WISEgrants Administrator** will need to provide grant level access and assign "Edit" or "View" rights to the new grant for each WISEgrants User and WISEgrants Administrator who requires access.

For example, WISEgrants Administrators and WISEgrants Users who cannot save data or submit a Fund Management selection in a grant application only have "View" access to the grant. Users that cannot view the grant have no access to that grant.

Fund Management Selection Carl Perkins CTE - \$9,138.26

If the user cannot Submit Selection or save any data, that user has View rights to the application.

Select one of the following methods to manage your Carl Perkins CTE funds:

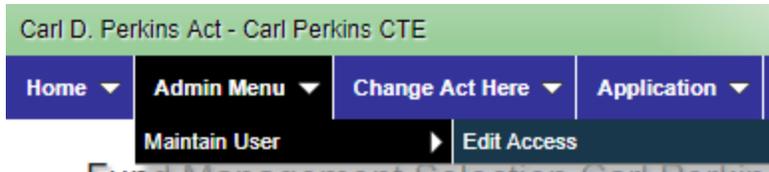
Select a Consortium Leader Cooperative Ed Serv Agcy 11 ▼

Surrender Funds to DPI

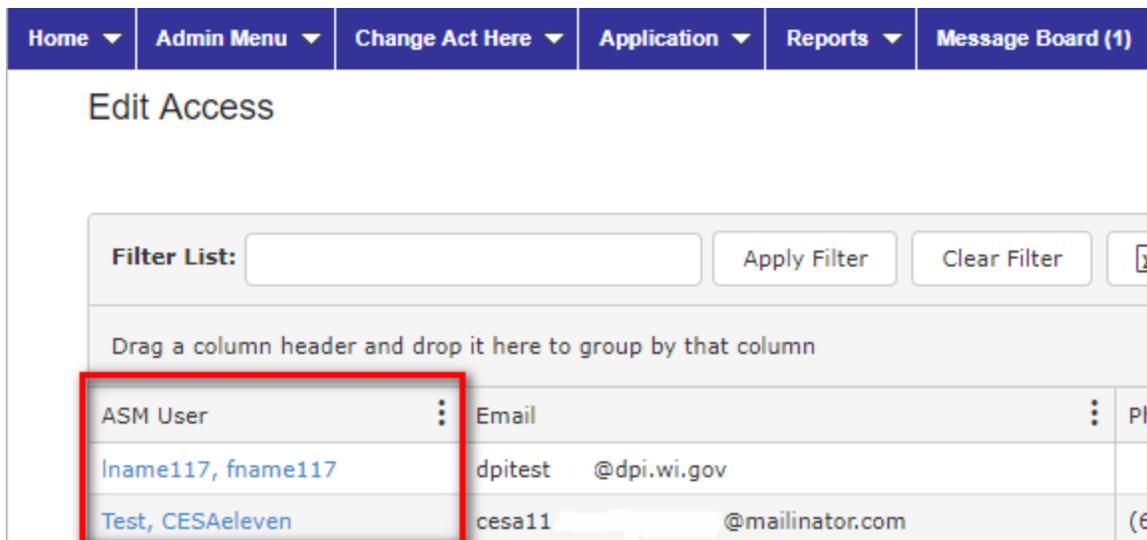


WISEgrants Administrators are the only users who can provide grant “Edit” or “View” access to other WISEgrants Administrators or WISEgrants Users within the local educational agency (LEA). WISEgrants Administrators with Maintain User access can follow these steps to provide “Edit” or “View” access in the Application/Budgeting and Claiming Areas for a new grant:

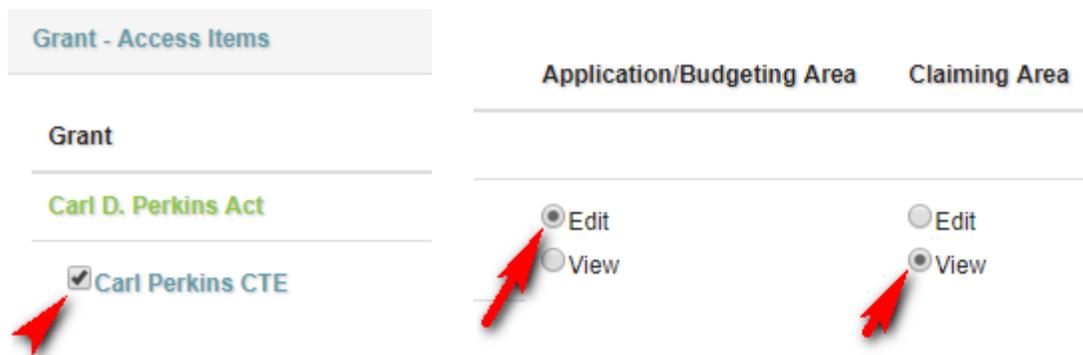
1. Log in to [WISEgrants](#).
2. In the blue menu bar hover over Admin Menu > Maintain User > and click Edit Access.



3. WISEgrants Administrators should see the names of all approved Application Security Managers (ASM Users) for the LEA. Select the name of the staff member whose access you wish to edit.



4. Down the page, in the Grant – Access Items section, the WISEgrants Administrator will need to check the box next to the grant to give access and grant “Edit” or “View” rights to the appropriate Application/Budgeting and/or Claiming Area.



5. Scroll to the bottom of the screen and click “Save.”
6. A message that the change was successfully saved will display.
7. The user whose credentials were edited must log out and log back in to reset the session. This will ensure the system saves the new grant Application/Budgeting and Claiming credentials and allows access where appropriate.

Authorizations Access

New Authorizers do not need to be assigned for a new grant because “Authorizations” are a “Global Access Item.” WISEgrants Administrators can see who has “Authorizations” access in the LEA on the Edit Access screen (Admin Menu > Maintain User > and click Edit Access). User roles and Authorizer status are indicated in the far right columns.

Role Name	Authorizer
WISEgrants Administrator	
WISEgrants User	X

WISEgrants users can also access the Subrecipient Authorizers list in the Reports Menu > Subrecipient Authorizers Report.

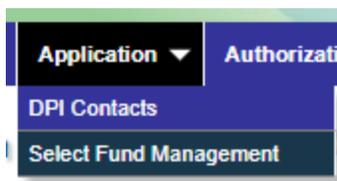
The screenshot shows the top navigation bar of the WISEgrants system. The 'Reports' menu is open, displaying a list of options: ESEA, Title I, Title II, Title III, Flowthrough, and Preschool. The 'Subrecipient Authorizers' option is highlighted with a red box. Below the navigation bar, the 'Subrecipient Authorizers' page is partially visible, showing introductory text and a table with one row containing 'ASM User'.

Authorizers have the ability to approve forms on behalf of the agency, including Assurances and Certifications, Debarment and Suspension, Anti-Lobbying, and Consortium Verification forms. Authorizer status should only be granted to those users who are designated by the School Board. WISEgrants Administrators can provide “Authorizations” privileges to new users by accessing the Edit Access screen and checking the Authorizations box for the designated user.

Consortium Verification

Authorizers (described above) can approve grant Consortium Verification forms.

1. In the blue menu bar hover on Change Act Here > select the appropriate Act and Grant
2. An application menu will appear in the blue bar and you can click Select Fund Management. Users can also click the Select Fund Management link near the bottom of the page in the currently selected Grant Application menu.



3. Choose the Consortium Leader
4. Click “Submit Selection” to set the fund management selection

Fund Management Selection Title IV-A - \$10,000.00

The screenshot shows a form titled "Select one of the following methods to manage your Title IV-A funds:". There are three radio button options: "Manage Own Funds", "Select a Consortium Leader", and "Select Third Party Grant Administrator". The "Select a Consortium Leader" option is selected, and a dropdown menu next to it shows "Cooperative Ed Serv Agcy 06". A red arrow points to the selected radio button.

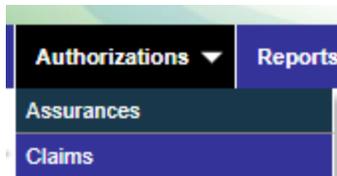
- This alerts the user to access the Authorizations > Assurances screen to authorize the Consortium Verification form.

Fund Management Already Selected

The sub-recipient has elected to join a consortium led by Cooperative Ed Serv Agcy . **The consortium will receive** School District's allocation pending verification by the district authorizer.

Please let your district authorizer know that the Consortium Verification Form needs to be authorized. The form will be found under the Assurances link of the Authorizations menu.

- In the blue menu bar hover on Authorizations and click Assurances.

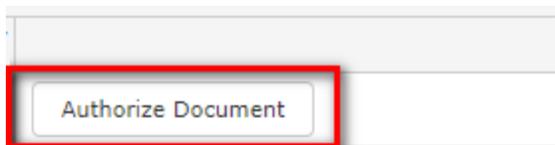


- Now that the LEA has selected fund management to join a consortium there is a Consortium Verification form available to authorize.

Documents To Be Authorized

Drag a column header and drop it here to group by that column		
Act	Grant	Document Name
ESEA	Title IV-A	Title IV-A Consortium Verification

- Click Authorize Document to approve that you are joining the consortium.

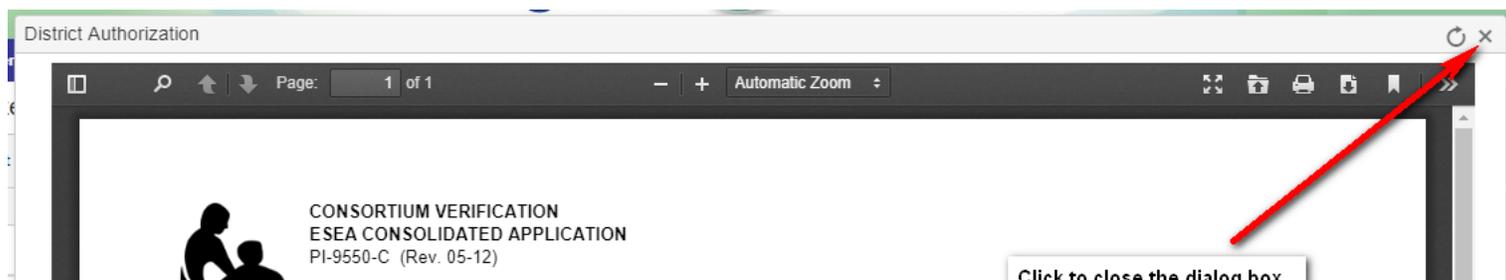


- The District Authorization dialog box will populate with the correct grant information. Review the document and click “Click to Add Digital Signature.”

Title IV-A Consortium Verification



- Click the X to close the dialog box.



11. The Consortium Verification now appears in the Authorized Documents section and the funds are available for the Consortium Leader to budget.

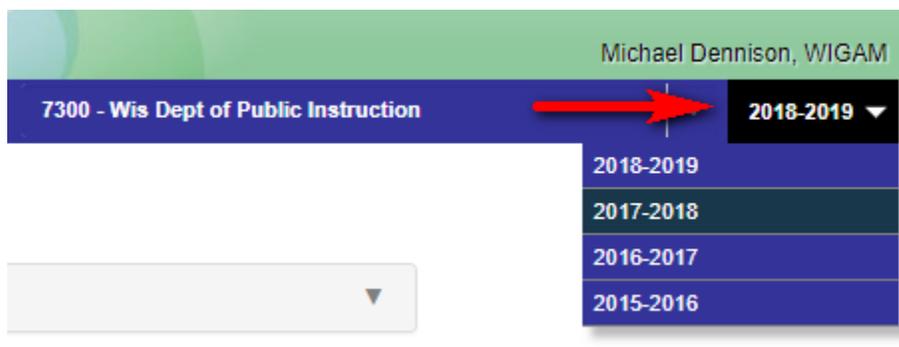
Authorized Documents

Drag a column header and drop it here to group by that column		
Act	Grant	Document Name
ESEA	Title IV-A	Title IV-A Consortium Verification

12. Consortium Leaders or any agency acting as a fiscal agent must also authorize Act Certifications and Assurances.

Fiscal Year

New grants are added for specific fiscal years during the course of the current fiscal year. For example, in 2017-2018 the Title IV, Part A grant under ESEA was added to the 2017-2018 fiscal year due to a delay in allocations from the Federal government. Also in 2017-2018, shortly after Title IV-A was opened, WISEgrants opened the Carl D. Perkins Career and Technical Education (CTE) grant for the 2018-2019 school year. WISEgrants Administrators and Users are encouraged to always check that they are working in the correct Fiscal Year, particularly as more grant applications are added to the system.



Contact DPI

For assistance with a specific grant, please utilize the DPI Contacts menu option within the Application menu to find contact information for the DPI consultant or grants specialist who works on your program.

