ZOOMGRANTS SETUP FOR CURRENT DCJ ACTIVE GRANTS

TRANSITIONAL INSTRUCTIONS

REVISED 09/05/2018

Current DCJ Grantees that have active grants will either be transitioned to a paper process or to ZoomGrants for the remainder of the grant period. These instructions are provided for those Grantees that will be transitioning over to ZoomGrants in 2016.
Welcome to ZoomGrants

ZoomGrants (ZG) will offer you an opportunity to use an online system to submit your grant materials.

Who will be impacted? Grantees that have an active/open grant will either be transitioned to a fully paper process or into ZG. This determination is made by your grant manager and is based on factors such as length of time remaining on the grant. You will or already have received guidance from your grant manager about the use and submission of forms for active grants. If you are unsure of the method for submitting forms, please contact your grant manager.

What should I expect? If your grant was chosen to transition to ZG, you will receive communication from your grant manager and/or my office. The timing of the transition and subsequent communication will depend on the award period of your grant.

These grants are considered “Transition” grants for labelling purposes only and signify that data was migrated into ZG from another source. The instructions in this document apply only to those transition grants. New/future funding opportunities may or may not be announced in ZG. Additional information will be provided under separate cover regarding upcoming opportunities.

Where do I go to for help? DCJ will be keeping up to date instructions on the DCJ grants page https://www.colorado.gov/pacific/dcj/grants-training-materials. We encourage you to check back often for updates.

DCJ has been working hard to migrate data and make this transition as seamless as possible for you, the grantees; but as with the startup of any new system, we expect that there will be a few bumps in the road along the way and appreciate your patience and support.

Lyndsay J. Clelland, MS
Contracts, Grants & Compliance Coordinator
Colorado Department of Public Safety, Division of Criminal Justice

06/01/2017
Contents
ZoomGrants Account Structure ........................................................................................................... 4
  Account Owners ................................................................................................................................. 4
  Collaborators .................................................................................................................................. 4
  Additional Contacts ........................................................................................................................... 5
Log into ZoomGrants ............................................................................................................................ 5
  Account Owners - Login ..................................................................................................................... 5
  Collaborators - Login .......................................................................................................................... 6
Validate Applicant Profile - Account Owners Only .............................................................................. 6
  My Account Profile ............................................................................................................................ 6
  My Organization ............................................................................................................................... 8
  Change UserID/Password .................................................................................................................... 9
Opening a Grant .................................................................................................................................. 11
  Account Owners – Opening a Grant .................................................................................................... 11
  Collaborators – Opening a Grant ....................................................................................................... 11
Navigating and Validate your DCJ transition grant ........................................................................... 11
  My Account Home ........................................................................................................................... 12
  Funding Opportunity Tabs .................................................................................................................. 12
  Application Tabs .............................................................................................................................. 12
  Summary .......................................................................................................................................... 13
    Project Number/Title and Amount .................................................................................................... 14
    Applicant Information ...................................................................................................................... 14
    Organization Information ................................................................................................................. 15
  Pre-Application/Organizational Details ............................................................................................ 18
  Questions .......................................................................................................................................... 18
  Budget Summary .............................................................................................................................. 19
  Tables .............................................................................................................................................. 19
    Goals & Objectives .......................................................................................................................... 20
    Personnel: Budget & Budget Narrative Details ............................................................................... 20
ZoomGrants Account Structure

Grantees will log into ZoomGrants as either an Account Owner or a Collaborator. Additional Contacts may be added for communication purposes only.

- Zoomgrants accounts have been created for all “Transition” grants.
- DCJ will email the user ID and password to the singular Account Owner.
- Accounts are linked to a singular email address (Account Owner). There is no agency account in ZG; there are only individual accounts.

Account Owners

Accounts are linked to a singular email address.

- The userID is the email address. There is no agency account in ZG; there are only individual accounts and the userID is an email address.
- The Account Owner must add Collaborators and Additional Contacts at the Application level for each project.
- Individual accounts belong to the Grantee and are not specific to DCJ or even the State of Colorado. A grantee that has a ZG account may use that account to apply for any ZG opportunity regardless of whom the funder is and where the funder is located. However, an individual account may NOT be used as an administrator account and a Grantee account (i.e. if you give out grants and manage those grants with ZoomGrants, you may not use that same account/email address to apply for grants as a grantee).

Only the Account Owner may:

- Add, delete, modify Collaborators
- Create, delete or archive an Application
- Submit an Application
- An Account Owner may be changed to another email address (new Account Owner) at any time by the current Account Owner or by Zoomgrants staff upon request.

Collaborators

The Account Owner adds Collaborators on a project by project basis. The Account Owner must ensure that all the appropriate Project Officials and DCJ staff are added as Collaborators to each grant, and given the proper permissions.

- Collaborators cannot submit, archive, or delete an application.
- Collaborators can update a grant project, complete reports, and upload documents for a grant or a project if given the proper permissions.

A Collaborator may be given access to:

- **Application:** Edit the following tabs: 1) Summary, 2) Organizational Details, 3) Questions/Statement of Work, 4) Tables. **Note:** Once an application is submitted it cannot be edited unless it has been open for editing by a DCJ Grant Manager.
• **Financial:** Access payment requests (Payment Request Form 3).
• **Grant Agreement:** Access the grant agreement tab. This tab contains the Reporting Schedule, a copy of your current grant agreement, and any additional instructions provided by your DCJ Grant Manager.

**NOTE:** DCJ Staff are currently added as Collaborators and should not be deleted. This allows DCJ staff to provide more comprehensive technical support.

### Additional Contacts

The *Account Owner* adds *Additional Contacts* on a project by project basis. *Additional Contacts* may also be updated by *Collaborators* and DCJ Staff.

- *Additional Contacts* will receive any email Notification generated out of the ZG system. Notifications may include award letters, funding recommendations, and report late notices.
- *Additional Contacts* do not have access rights to the grant unless they are also included as a *Collaborator*.

**NOTE:** A generic Division of Criminal Justice email address will be added as an additional contact on each grant in ZG. Do not delete this email address.

### Log into ZoomGrants

- Account Owners and *Collaborators* log in using different URLs.
- You may use any [up to date](#) browser (Internet Explorer, Mozilla Firefox, Safari, etc.). Chrome is preferred.

#### Account Owners - Login

*Account Owner* Login: [https://zoomgrants.com/gprop.asp?donorid=2225](https://zoomgrants.com/gprop.asp?donorid=2225)
Collaborators - Login

Collaborator Login: http://www.zoomgrants.com/invitations.asp

Validate Applicant Profile - Account Owners Only

The Applicant Profile has been created for you. The Applicant Profile consists of the following sections (which will be covered in more detail below):

- My Account Profile – individual credentials for the Account Owner.
- My Organization – Agency information associated with the Account Owner.
- Change UserID/Password – individual credentials for the Account Owner.
- Manage Security Profile – password recovery questions for the Account Owner.

Portions of the Account Profile will be linked/populated in each Application associated with that account. If information is changed in the Application, it will also change in the Account Profile.

My Account Profile

Individual credentials for the user associated with the account.

1) Click on My Account Home

![My Account Home](image_url)
2) Click on **Account Profile**

![Account Profile Image]

3) **Review/Update My Account Profile**
- Check for typos and correct contact information.
- If you want to change this to someone else in your organization or an organization-wide email address, you may do so.
- If you have a change in Project Director you will need to complete a [Change in Project Officials (DCJ Form 4-B)](#) and upload the completed form on the **Documents** tab. You may still update the **Account Owner** here, but a change form will be required to change the project officials on each respective grant.

![Account Profile Section Image]
My Organization

Agency information associated with the user.

1) Click on My Organization
   If you have backed out and are coming back into the system following the path:
   My Account Home
   Account Profile
   My Organization

2) Review/Update My Organization as appropriate
   • Check for typos and correct contact information.
   • DCJ goes through an extensive validation process regarding Agency information. This includes verifying name consistency with the Colorado Secretary of State, CORE validation, etc. In ZoomGrants certain information may be updated at any time, but doesn’t mean it should.
   • See the screenshot below to determine which fields should be edited and which fields you should contact your grant manager about before changing.
   • Any inconsistent name could slow or even halt the processing of grant agreements and payments.
Change UserID/Password

Individual credentials for the user associated with the account.

1) Click on Change UserID/Password
   If you have backed out and are coming back into the system following the path:
   
   My Account Home
   Account Profile
   Change UserID/Password

2) Review/Update Change UserID/Password as appropriate
   • The email address should be associated with the individual listed in My Account Profile. The email address is the UserID. If you change it, you will change your access to the account.

   ![Image of My Account Home and Change UserID/Password]

   **NOTE:** If you change the Email UserID, you must log out and log back in using the new Account Owner information.

Manage Security Profile

ZoomGrants requires all users to maintain a Security Profile to aid in the retrieval of passwords. This profile consists of three security question/answer pairs. If you forget your password, answering those three questions correctly will allow you to reset your password.

1) Click on Manage Security Profile
   If you have backed out and are coming back into the system following the path:
   
   My Account Home
   Account Profile
   Manage Security Profile

2) Review/Update Manage Security Profile as appropriate
   • Update your questions and answers, then click the Save button.
NOTE: Account Owners will be prompted to create a Security Profile the first time they log into an account.
Opening a Grant
The steps followed to open a grant is different for Account Owners and Collaborators.

Account Owners – Opening a Grant

Click on the grant name to open the grant.

Collaborators – Opening a Grant

Click on View Application

- The grant will open in a new tab.
- To back out of the grant, close the tab.
- To open another grant as a Collaborator click on View Application next to each grant.

Navigating and Validate your DCJ transition grant

Once the grant is open the screens are the same for both the Account Owner and Collaborators. The Account Owner will have more permissions, visibility and access to items than the Collaborators.
My Account Home

My account home is only visible to Account Owners. This button backs the Account Owner out of the Application. Note: Collaborators do not have this feature because each Application opened by a Collaborator opens in a new tab.

Funding Opportunity Tabs

These tabs are associated with the Funding Opportunity and is the same for all Applications residing within the same Funding Opportunity. Note: Transition grants have been lumped into a few Funding Opportunities. New Funding Opportunities will reflect specific funding announcements.

Application Tabs

These tabs are associated with an individual application. The project information resides in 9 different tabs:

- Summary
- Organizational Details
- Questions
- Budget Summary
- Tables
- Documents
- Grant Agreement
- Financial
• Report
• Report Totals

NOTE: The application tab structure and functions are consistent between all applications, but may have different naming conventions between Programs/Funding Opportunities.

Follow the steps below to review each tab.

Note: You can view all project information in one document by clicking Print/Preview. You may save this version as a pdf on your computer. Prior to making any changes please backup your data by saving a copy of your project using the Print/Preview options.

Summary

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager.

- Grant title & Amount.
- Organizational details for ALL grants associated with the account. If it is changed here, it will change everywhere.
- Manage Collaborators and Additional Contacts.
### Project Number/Title and Amount

Review for accuracy and contact your grant manager if you see any errors. These fields may be updated by the *Account Owner* or any *Collaborator* that has been given access to the *Application*.

<table>
<thead>
<tr>
<th>Field</th>
<th>Content</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name/Project Title</td>
<td>Project Number and Project Name</td>
<td>Not editable unless application is unlocked for editing by grant manager</td>
</tr>
<tr>
<td>Amount Requested</td>
<td>Current Award Amount</td>
<td></td>
</tr>
</tbody>
</table>

### Applicant Information

You may make changes as needed. See [My Account Profile](#) for more information. These fields may be edited only by the *Account Owner*.

<table>
<thead>
<tr>
<th>Field</th>
<th>Content</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Information associated with the <em>Account Owner</em></td>
<td>Any changes here will change the information in <a href="#">My Account Profile</a></td>
</tr>
<tr>
<td>Last Name</td>
<td>Information associated with the <em>Account Owner</em></td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td>Information associated with the <em>Account Owner</em></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>UserID of the <em>Account Owner</em></td>
<td>Email associated with the account. It can only be changed in <a href="#">Change UserID/Password</a></td>
</tr>
</tbody>
</table>
Organization Information

- These fields may be edited only by the Account Owner.
- DCJ goes through an extensive validation process regarding Agency information. This includes verifying name consistency with the Colorado Secretary of State, CORE validation, etc. In the COGMS once a profile was validated by the state it was locked down. ZoomGrants allows you to edit these fields.
- Any inconsistent name could slow or even halt the processing of grant agreements and payments.
Fields highlighted in yellow should NOT be updated without consulting your grant manager. All other fields may be updated as needed.

<table>
<thead>
<tr>
<th>Field</th>
<th>Content</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Applicant Agency Name</strong></td>
<td>Name that the agency is doing business as.</td>
<td>Any changes here will change the information in My Organization and all other applications in this account</td>
</tr>
<tr>
<td></td>
<td>If you have a parent entity (Legal Entity, this information is entered on the Pre-Application/Organizational Details tab.</td>
<td></td>
</tr>
<tr>
<td>Address 1</td>
<td>Address associated with this agency</td>
<td></td>
</tr>
<tr>
<td>Address 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State/Province</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ZIP+4/Postal Code</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telephone</td>
<td>Primary contact for this agency</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>Primary contact for this agency</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td>Website for the agency</td>
<td></td>
</tr>
<tr>
<td><strong>EIN (XX-XXXXXXX)</strong></td>
<td>Tax ID for payment</td>
<td>Editable - this must match the coding in the state financial system. EIN must have the “-“ in the number (XX-XXXXXXX) or it won’t pass the IRS validation test.</td>
</tr>
<tr>
<td><strong>DUNS Number</strong></td>
<td>Federal DUNS number</td>
<td>Editable</td>
</tr>
<tr>
<td>SAM/DUNS Expiration (MM/DD/YYYY)</td>
<td>Date verified on sam.gov</td>
<td>Editable – must not be expired</td>
</tr>
<tr>
<td>CEO/Executive Director (If NA, enter Signature Authority)</td>
<td>Header</td>
<td></td>
</tr>
<tr>
<td>First Name</td>
<td>List the Executive Director of your agency. If you do not have an ED, list the Signature Authority information.</td>
<td>Any changes here will change the information in My Organization and all other applications in this account</td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**IRS Verification & SAM Verification**

ZoomGrants verifies the status of applicant organizations via the EIN and/or DUNS numbers. Using data released by the federal government, ZoomGrants completes an IRS verification (via each applicant’s EIN) and/or a SAM verification (via each applicant’s DUNS number) and presents the results for each applicant in the Application Summary tab of their applications.

The federal government releases this data every month, so the IRS and SAM checks are completed once an applicant submits their application and are automatically updated monthly, following the release of the new data.

The IRS verification will only appear in the Application Summary tab of an application if a valid EIN is entered. The SAM verification will only appear in the Application Summary tab on an application if a valid DUNS number is entered.

Contact ZG Tech Support desk – (866) 323-5404 x2, for questions on IRS & SAM verification.

**Adding Collaborators and Additional Contacts**

![Collaborators](image)

**Collaborators**

The **Collaborator** feature allows applicants *(Account Owners)* to invite others to work on the specific sections of the project.
• DCJ has added several DCJ staff as Collaborators to your grant. This will allow us to better assist you during this transition time. Please do not delete DCJ staff as Collaborators unless asked to do so by DCJ staff.
• You will want to add other individuals to your project such as the Financial Officer, and others who will work on the post award submissions (payment requests, narrative reports, etc.)
• ZoomGrants will auto generate an email invitation to each Collaborator, with a link to login to ZoomGrants.

Additional Contacts for this Application

Additional Contacts will be copied on all emails sent to the application owner regarding this application. Enter ONLY email addresses separated by a comma. No names. No titles. No phone numbers.

NOTE: DCJ will have a general email address added here for each grant. Do not delete.

Pre-Application/Organizational Details

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the Account Owner or any Collaborator that has been given access to the Application.

Often times a grantee will have a Legal Entity Name that is different than Applicant Agency Name and we need to capture both. This tab collects data formerly collected in the COGMS Applicant Profile and once it is approved it is locked down and cannot be edited unless the grant manager opens the Pre-Application/Organizational Details tab for editing. If you do business under the same name as the legal entity name, then this information will be the same as the My Organization Information.

• Check for typos and/or data entry errors; notify your grant manager of any errors.
• DCJ goes through an extensive validation process regarding Agency information. This includes verifying name consistency with the Colorado Secretary of State, CORE validation, etc.; however, during the data migration an error in entry may have occurred.

Questions

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the Account Owner or any Collaborator that has been given access to the Application.
• Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.
• The information contained here should match the information contained in Exhibit B1 – Statement of Work in your grant agreement.

Budget Summary

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the Account Owner or any Collaborator that has been given access to the Application.

This section contains a snapshot of the Budget. Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.

• The information contained here should match the information contained in Exhibit B2 – Budget and Budget Narrative in your grant agreement.

Tables

Once a project has been submitted it cannot be edited unless it is opened for editing by a DCJ grant manager. These fields may be updated by the Account Owner or any Collaborator that has been given access to the Application.

**NOTE:** This tab sections structure and functions are consistent between all applications, but may have different naming conventions and content between Programs/Funding Opportunities. As of 5/27/2017, Office of Victim’s Programs (OVP) grants will NOT be using the Tables tabs for their transition grants. During the migration some grants had this information populated. At this time due to process decisions, OVP grants will not use the information. You may disregard this section for OVP transitions grants.

This section contains five (5) different tables. The Tables tab editing ability is controlled by the grant manager who may open up columns for editing at specific times.
Goals & Objectives

- Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.
- The information contained here should match the information contained in Exhibit B1 – Statement of Work in your grant agreement.

Personnel: Budget & Budget Narrative Details

- Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.
- The information contained here should match the information contained in Exhibit B2 – Budget and Budget Narrative in your grant agreement.

Non-Personnel: Budget & Budget Narrative Details

- Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.
- The information contained here should match the information contained in Exhibit B2 – Budget and Budget Narrative in your grant agreement.

Additional Project Funding

- Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.
- The information contained here should match the information contained in Exhibit B2 – Budget and Budget Narrative in your grant agreement.

Prior JAG Funding

- Check for typos and/or data entry errors; notify your grant manager of any errors that may have occurred during the data migration.
- The information contained here should match the information contained in Exhibit B2 – Budget and Budget Narrative in your grant agreement.

Documents

Documents may be updated by the Account Owner or any Collaborator that has been given access to the Application. All uploaded documents will be housed here with the exception of the Narrative Report, which will be uploaded on the Report tab.
If you submitted documents via COGMS or paper, these documents may be uploaded here. (Note: Different grant programs have different attachment requirements.)

<table>
<thead>
<tr>
<th>Documents Requested</th>
<th>Required</th>
<th>Uploaded Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational Chart – with requested personnel highlight (including personnel which would be paid with matching funds)</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Job Descriptions for staff that would be paid for with OVP funds</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Job Descriptions for volunteer staff – if volunteers are used as match</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Job Descriptions for match staff – if paid staff is used as match</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Board Members list – non-profit agencies only</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Proof of non-profit status – new non-profit applicants only</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Sample timesheet currently used by the position(s) for which you are requesting OVP funding</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Sample timesheet currently used by the volunteer staff – if volunteers are used as match</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Budget Revision (DCJ Form 4-A)</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Change in Project Officials (DCJ Form 4-B)</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Change in Grant Award Period (DCJ Form 4-C)</td>
<td>-none-</td>
<td>Upload</td>
</tr>
<tr>
<td>Modification of Other Grant Agreement Terms (DCJ Form 4-D)</td>
<td>-none-</td>
<td>Upload</td>
</tr>
</tbody>
</table>

- Check to see if your document is appropriately attached, if one was originally submitted.
- You do not need to upload any documents unless a document was originally submitted and is not attached here. Audits have not been pre-populated, but if you have a link to your most recent audit/financial review, please update.

**Administrative Documents:** Where DCJ staff will upload Approved forms and other grant documents for your records.

**Grant Agreement**

This tab is only visible to awarded grants.

Documents may be updated by the *Account Owner* or any *Collaborator* that has been given access to the *Grant Agreement*. Report schedule, a copy of the unsigned grant agreement, and any other instructions from your DCJ Grant Manager will be here.
The content may be different than the screen shot below. Currently, the State of Colorado does not accept electronic signatures on grant agreement. Therefore, DCJ has re-tasked this section to provide instructions to the grantee.
**Grant Agreement – Grant Agreement & Signatures**

By signing the Grant Agreement tab you are certifying that you have read the information contained within the Grant Agreement box.

**Grant Agreement - Documents**

There are at least two Documents that you must review. Additional line items may be present. You must sign each item.

- **Grant Agreement** – This is an unsigned copy of your current Grant Award.
  - By signing this document you are acknowledging that the correct attachment is present. This does NOT replace any signed grant agreement in place (i.e. hard copy with wet signature).

- **Reporting Schedule** – The report schedule contains the reporting & payment request submissions that will be due during the life of your project.
  - Review the Reporting schedule. See [Sample Reporting Schedule](#) for more information.
  - By signing this document you are certifying that you understand the reporting requirements for this project.
**Special Projects Reporting Schedule**

**05/01/2017 to 12/31/2018**

*Do not submit a Payment Request for $0. Only submit a payment request if you have expenditures for that quarter.*

<table>
<thead>
<tr>
<th>Report Tab #</th>
<th>Report Type - Name given to report upon upload or entered in Payment Number</th>
<th>Period</th>
<th>Due Date</th>
<th>Required</th>
<th>Upload/Submit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Q1 - Financial Report (1-A) - Quarterly - May-Jun 2017</td>
<td>05/01/2017 – 06/30/2017</td>
<td>07/07/2017</td>
<td>Yes</td>
<td>Submit – No attachment</td>
</tr>
<tr>
<td>2</td>
<td>Q1 - Narrative Report - Quarterly - May-Jun 2017</td>
<td>05/01/2017 – 06/30/2017</td>
<td>07/17/2017</td>
<td>Yes</td>
<td>Upload - Attachment Required</td>
</tr>
<tr>
<td>Financial Tab</td>
<td>Q1 - Payment Request - Quarterly - May-Jun 2017</td>
<td>05/01/2017 – 06/30/2017</td>
<td>07/07/2017</td>
<td>No*</td>
<td>Submit Payment Request – No attachment</td>
</tr>
<tr>
<td>N/A</td>
<td>Q1 - Federal Performance Measurement Tool (PMT) due</td>
<td>05/01/2017 – 06/30/2017</td>
<td>07/17/2017</td>
<td>Yes</td>
<td>Submit via online system: <a href="https://opi.sco.gov/">https://opi.sco.gov/</a></td>
</tr>
<tr>
<td>3</td>
<td>Q2 - Financial Report (1-A) - Quarterly - Jul-Sep 2017</td>
<td>07/01/2017 – 09/30/2017</td>
<td>10/16/2017</td>
<td>Yes</td>
<td>Submit – No attachment</td>
</tr>
<tr>
<td>4</td>
<td>Q2 - Narrative Report - Quarterly - Jul-Sep 2017</td>
<td>07/01/2017 – 09/30/2017</td>
<td>10/16/2017</td>
<td>Yes</td>
<td>Upload - Reports tab - Attachment Required</td>
</tr>
<tr>
<td>Financial Tab</td>
<td>Q2 - Payment Request - Quarterly - Jul-Sep 2017</td>
<td>07/01/2017 – 09/30/2017</td>
<td>10/16/2017</td>
<td>No*</td>
<td>Submit Payment Request – No attachment</td>
</tr>
<tr>
<td>N/A</td>
<td>Q1 - Federal Performance Measurement Tool (PMT) due</td>
<td>05/01/2017 – 06/30/2017</td>
<td>10/16/2017</td>
<td>Yes</td>
<td>Submit via online system: <a href="https://opi.sco.gov/">https://opi.sco.gov/</a></td>
</tr>
<tr>
<td>5</td>
<td>Q3 - Financial Report (1-A) - Quarterly - Oct-Dec 2017</td>
<td>10/01/2017 – 12/31/2017</td>
<td>01/15/2018</td>
<td>Yes</td>
<td>Submit – No attachment</td>
</tr>
<tr>
<td>6</td>
<td>Q3 - Narrative Report - Quarterly - Oct-Dec 2017</td>
<td>10/01/2017 – 12/31/2017</td>
<td>01/15/2018</td>
<td>Yes</td>
<td>Upload - Reports tab - Attachment Required</td>
</tr>
<tr>
<td>Financial Tab</td>
<td>Q3 - Payment Request - Quarterly - Oct-Dec 2017</td>
<td>10/01/2017 – 12/31/2017</td>
<td>01/15/2018</td>
<td>No*</td>
<td>Submit Payment Request – No attachment</td>
</tr>
<tr>
<td>N/A</td>
<td>Q1 - Federal Performance Measurement Tool (PMT) due</td>
<td>05/01/2017 – 06/30/2017</td>
<td>01/15/2018</td>
<td>Yes</td>
<td>Submit via online system: <a href="https://opi.sco.gov/">https://opi.sco.gov/</a></td>
</tr>
<tr>
<td>7</td>
<td>Q4 - Financial Report (1-A) - Quarterly - Jan-Mar 2018</td>
<td>01/01/2018 – 03/31/2018</td>
<td>04/16/2018</td>
<td>Yes</td>
<td>Submit – No attachment</td>
</tr>
<tr>
<td>8</td>
<td>Q4 - Narrative Report - Quarterly - Jan-Mar 2018</td>
<td>01/01/2018 – 03/31/2018</td>
<td>04/16/2018</td>
<td>Yes</td>
<td>Upload - Reports tab - Attachment Required</td>
</tr>
<tr>
<td>Financial Tab</td>
<td>Q4 - Payment Request - Quarterly - Jan-Mar 2018</td>
<td>01/01/2018 – 03/31/2018</td>
<td>04/16/2018</td>
<td>No*</td>
<td>Submit Payment Request – No attachment</td>
</tr>
</tbody>
</table>
Financial = Payment Requests

This tab is only visible to awarded grants. Payment Requests may be completed by the Account Owner or any Collaborator that has been given access to Financial. The Project Director (PD) must submit the Payment Request.

Each submission in Zoomgrants will be tracked by the user that submitted the document and the IP address. This acts as the digital signature and the Project Director (either as an Account Owner or a Collaborator) is the only person who should submit the payment request. A financial officer or other official may complete the content of the payment request, but the PD must submit it.

Once a Payment Request has been submitted it cannot be edited unless it is “un-submitted” by a DCJ Grant Manager.

The Financial tab contains an overview of your total grant award (less match), the status of all payment requests, and the remaining balance. The Financial tab does NOT track match or expenditures by line item; this information is tracked on the Reports tab.

Depending on the timing of your grant, some payment request information may already be populated for you.

- If your grant manager has populated previous payments on this grant, review the information and confirm that it is correct. Notify your grant manager if the information is not correct. Review the content and the attachments.
## Payment Requests
Payment Requests open in a new window. You may submit a payment request either on the Financial tab or under the My Account Home- Approved grants tab.

### Payment

<table>
<thead>
<tr>
<th>Date</th>
<th>Number</th>
<th>Description</th>
<th>Payment Request Number</th>
<th>Status</th>
<th>Payment</th>
<th>Deposit</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/23/2016</td>
<td></td>
<td></td>
<td></td>
<td>CY16</td>
<td>Paid</td>
<td></td>
<td>$47,817.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Payment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7/18/2016</td>
<td></td>
<td></td>
<td></td>
<td>CY16</td>
<td>Paid</td>
<td></td>
<td>$31,472.03</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Payment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/30/2016</td>
<td>15-VA-9043-JUL-SEP</td>
<td>2016-1371</td>
<td>CY16 Payment Request Jul-Sep</td>
<td>Paid</td>
<td>$16,023.88</td>
<td>$15,448.15</td>
<td></td>
</tr>
<tr>
<td>2/13/2017</td>
<td>15-VA-9043-OCT-DEC</td>
<td>2016-1371</td>
<td>CY16 Payment Request Oct-Dec</td>
<td>Paid</td>
<td>$15,448.15</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

Total: $4,354.00 $64,354.00 $0.00

### Payment Request

<table>
<thead>
<tr>
<th>Payment Request Number</th>
<th>Date Submitted</th>
<th>Status</th>
<th>Requested</th>
<th>Approved</th>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY16 Payment Request Jan-Mar</td>
<td>3/29/2017</td>
<td>Paid</td>
<td>$16,536.75</td>
<td>$16,536.75</td>
<td>$16,536.75</td>
</tr>
<tr>
<td>CY16 Payment Request Apr-Jun</td>
<td>3/29/2017</td>
<td>Paid</td>
<td>$16,345.22</td>
<td>$16,345.22</td>
<td>$16,345.22</td>
</tr>
<tr>
<td>CY16 Payment Request Jul-Sep</td>
<td>4/28/2017</td>
<td>Paid</td>
<td>$16,023.88</td>
<td>$16,023.88</td>
<td>$16,023.88</td>
</tr>
<tr>
<td>CY16 Payment Request Oct-Dec</td>
<td>4/28/2017</td>
<td>Paid</td>
<td>$15,448.15</td>
<td>$15,448.15</td>
<td>$15,448.15</td>
</tr>
</tbody>
</table>

Total: $4,354.00 $64,354.00 $0.00
You will be prompted to populate all fields associated with Payment Request (DCJ Form 3) prior to submitting.

1. **Payment Request Contact Name:** the person submitting the form
2. **Payment Request Contact Email:** the person submitting the form
3. **Payment Request Contact Phone:** the person submitting the form
4. **Payment Request Number:** should follow the naming conventions indicated in your Reporting Schedule. If you are unsure of the naming convention for your grant, please review your Reporting Schedule.
5. **Requested Amount:** enter the amount you are requesting
6. Complete the electronic Payment Request (DCJ Form 3)
7. Submit the Payment Request
# 2015-VA-14-

**Project (CY 16)**

<table>
<thead>
<tr>
<th>DCJ Grant Number</th>
<th>2015-VA-14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Match Required</td>
<td>Yes</td>
</tr>
<tr>
<td>Financial Grant Manager</td>
<td>Laura Montoya</td>
</tr>
<tr>
<td>Funding Entity Type (VOCA, VAWA, SASP, State VALIE)</td>
<td>Victims of Crime Act (VOCA)</td>
</tr>
<tr>
<td>Match Percent Required</td>
<td>20%</td>
</tr>
<tr>
<td>Program Income Allowed</td>
<td>No</td>
</tr>
<tr>
<td>Federal CFDA Number</td>
<td>16.575</td>
</tr>
<tr>
<td>Federal Award Number (1)</td>
<td>2015-VA-OX-0040</td>
</tr>
<tr>
<td>Federal Award Number (2)</td>
<td>NA</td>
</tr>
</tbody>
</table>

## Your Agency address will appear here.

<table>
<thead>
<tr>
<th>Tel</th>
<th>970-945-</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fax</td>
<td>970-928-</td>
</tr>
<tr>
<td>EIN</td>
<td>84-104-</td>
</tr>
</tbody>
</table>

## Total Requested

| Amount | $ 0.00 |

## Payment Request Number

| 2016 Payment Request Jan-Mar |

## TIME PERIOD

| Calendar Year (2019 or 2020) | 2018 |
| Payment Frequency (Q = Quarterly or M = Monthly) | Q |
| Start Month for this Request (Jul-07, Aug=08,... Jun=06) | 04 |
| End Month for this Request (Jul-07, Aug=08,... Jun=06) | 06 |

## All Federal/State Dollars previously requested have been received?

- [ ] Yes
- [ ] No
You may check back at any time to see if the payment has been processed or returned for edits by clicking on the Financial tab.

As the payment is routed and processed you will see real time updates on the status of payment request and the overall balances of the award on the invoice/payment request itself.

Additionally, after you Refresh your page you will see balance and status information on the financial tab.
Report

This tab is only visible to awarded grants. Financial Report (1-A) and Project Income (1-B) may be completed by the Account Owner or any Collaborator that has been given access to Reports. The Project Director (PD) must submit the Financial Reports and Program Income Reports.

The Narrative report may be submitted by any authorized project official. The uploaded narrative report must be signed by the Project Director.

You may submit a Report either on the Reports tab or under the My Account Home- Approved grants tab. The forms Financial Report (1-A) and Project Income (1-B) will be completed electronically within the system; all other forms will be completed in PDF and electronically attached.

The Reports tab works like an electronic filing cabinet for all the reports submitted to DCJ. Within the tab there are several reports subtabs. Each of these subtabs has a due date that corresponds to the Reporting Schedule provided under Grant Agreements tab.

Depending on the timing of your grant, some report information may already be populated for you.

- If your grant manager has populated previous reports for this grant, review the information and confirm that it is correct. Notify your grant manager if the information is not correct. Review the content and the attachments.
- The report type selected in question 1 will determine which questions are visible for each report.

**NOTE:** You will never submit Financial Report and a Narrative Report on the same tab. Each report must be submitted on a separate tab according to the Reporting Schedule. Incorrect submissions or submission on the wrong tab will be returned for corrections.
Once a Report is submitted a green checkmark will appear:

If a report is overdue, red text will appear:
Financial Reports and Program Income Reports

Financial Report (1-A) and Project Income (1-B) reports do NOT require any attachments, and must be **submitted** by the Project Director.

Narrative Reports

Narrative reports must be attached.
Report Totals

The Report Totals provides a summary of all the reports submitted:

Report (Post Award Submissions) Totals

1. What type of Report is this?
   - Financial Report (DCJ Form 1-A) - Quarterly
   - Financial Report (DCJ Form 1-A) - Final
   - Statistical and Narrative Report (DCJ Form 2) - Quarterly
   - Statistical and Narrative Report (DCJ Form 2) - Final
   - Program Income Report (DCJ Form 1-B) - Quarterly
   - Program Income Report (DCJ Form 1-B) - Final

2. Prepared By:
   - Text questions are not calculated

3. Prepared By Phone Number:
   - Text questions are not calculated

4. Reporting Period
   - 10-01-2016 to 12-31-2016
   - 01-01-2017 to 03-31-2017
   - 04-01-2017 to 06-30-2017
   - 07-01-2017 to 09-30-2017
   - 10-01-2017 to 12-31-2017
   - 01-01-2018 to 03-31-2018
   - 04-01-2018 to 06-30-2018
   - 07-01-2018 to 09-30-2018
5. Is this report a Quarterly AND Final Report
☑ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ No ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ Yes

6. Expenditures This Quarter - Award

<table>
<thead>
<tr>
<th>Totals</th>
<th>Goal</th>
<th>%</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>13402.11</td>
<td>13792.61</td>
<td>0.00</td>
<td>13792.61</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
<th>Goal</th>
<th>%</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel</td>
<td>0.00</td>
<td>0.00</td>
<td>6%</td>
<td>0.00</td>
</tr>
<tr>
<td>Supplies &amp; Operating Expenditures</td>
<td>0.00</td>
<td>0.00</td>
<td>6%</td>
<td>0.00</td>
</tr>
<tr>
<td>Travel Expenditures</td>
<td>0.00</td>
<td>0.00</td>
<td>6%</td>
<td>0.00</td>
</tr>
<tr>
<td>Equipment Expenditures</td>
<td>0.00</td>
<td>0.00</td>
<td>6%</td>
<td>0.00</td>
</tr>
<tr>
<td>Consultants/Contracts Expenditures</td>
<td>0.00</td>
<td>0.00</td>
<td>6%</td>
<td>0.00</td>
</tr>
<tr>
<td>Indirect Expenditures</td>
<td>0.00</td>
<td>0.00</td>
<td>6%</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>27,274.72</td>
<td>49,590.00</td>
<td>55%</td>
<td>22,315.28</td>
</tr>
</tbody>
</table>
Summary of Post Award Submissions

DCJ Payment Request, Reports, and Forms Submissions in ZoomGrants

- Payment Request (DCI Form 8)
- Narrative Reports (DCI Form 2)
- Financial Reports (DCI Form 1-A)
- Program Income (DCI Form 1-D)
- Equipment Inventory/Retention Certification (DCI Form 5)
- Equipment Procurement Certification (DCI Form 13)
- Consultants/Contracts Certification (DCI Form 16)
- Certification of Compliance with Regulations - Office of Civil Rights - Department of Justice (DCI Form 30)
- Conference Policy and Certification (DCI Form 31)
- Certification of Match (DCI Form 32)
- Budget Revision (DCI Form 4-A)
- Change in Project Officials (DCI Form 4-B)
- Change in Grant Award Period (DCI Form 4-C)
- Modification of other Grant Agreement Terms (DCI Form 4-D)
- All other documents not listed elsewhere
- Supporting Documentation

Upload the above listed documents on Documents Tab within the project. Each document should be uploaded in the flow that corresponds to the document type.

Notes: backup documentation must be kept in the file and may be requested at anytime.

- Federal Performance Measurement Tools (PMT)
- Performance Measurement Platform (PMP)

Not in ZoomGrants
Separate link to the Federal reporting system.

Attachments are not required. The Payment Request contains all the required information to submit a payment request.

Notes: backup documentation must be kept in the file and may be requested at anytime.

Create & Submit a Payment Request from the Financial Tab within the project.

Or

Use the shortcut: Add Payment Request from the Approved Projects Tab on My Account Home.

Complete & Submit a Report from the Reports Tab within the project.

Or

Use the shortcut: Add Report from the Approved Projects Tab on My Account Home.

Attachments are not required. The Financial Reports contain all the required information to submit a financial or program income report.

Narrative Reports: Attachments REQUIRED.

Note 1: Each Report type MUST be on a separate Report Tab. See Report Schedule to determine which report should be completed for each report tab. Incorrect submissions will be returned.

Note 2: backup documentation must be kept in the file and may be requested at anytime.