



DCJ_Job Aid

Job Aid	Setting up Tasks
Grant Programs	DV
Publication Date	11/18/2016
Revision Date	NA
Description	This job aid provides instructions on how to set up tasks in ZoomGrants (ZG). ZG does not have workflow or tracking mechanism to mark reports or other submitted documents as reviewed, complete, in progress, etc. DCJ will utilize the Tasks function to manage these processes.

- I. Purpose 0
- II. Setting up Tasks for Report Tracking 0
 - A. Access the Grant Program 1
 - B. Open the Application 1
 - C. Open the Task tab & Create Tasks 2
 - D. Update Internal Research Question..... 4
- Appendix I: 2016 Colorado Justice Assistance Grant -Task Setup 0
- Appendix II: 2016 National Criminal History Improvement Program - Task Setup 1
- Appendix III: 2016 Paul Coverdell Forensic Sciences Program - Task Setup..... 2
- Appendix IV: 2016-2017 State Juvenile Diversion Program & Marijuana Tax Cash Funds Transition - Task Setup 3
- Appendix V: 2017-2018 State Juvenile Diversion Program & Marijuana Tax Cash Funds Transition - Task Setup 4

I. Purpose

There is not a workflow associated with report processing. There is not a central location to designate that a report or other document has been approved. DCJ will utilize tasks to manage this process.

Additional, tasks may be used for a variety of other “reminders” for yourself or for other grant managers.

II. Setting up Tasks for Report Tracking

[Required for all Approved Awards] Tasks may be setup once the grantee has agreed to accept funding (i.e. after funding decision notification and grantee’s intent to accept funding), but no later than fifteen (15) days after the start of the project.

A. Access the Grant Program

Note: Program in ZoomGrants (ZG) is equivalent to Funding Opportunity (i.e. a group of applications group within the same funding cycle).

From the **My Account** page open the program by clicking **Dashboard** or name of the Program.

Open Programs	Submitted	Incomplete	Need Attention	Total Awarded	
Office of Adult and Juvenile Justice Assistance 2016 OAJJA Transition (JAG, NCHIP, COV) 8 New 11/16/2016 - 12/10/2016	18	41	0	\$ 643,563.00	Dashboard Program Setup
Recently Closed Programs (within 18 months)	Submitted	Incomplete	Need Attention	Total Awarded	
Office for Victims Programs 2016 OVP Transition (CVS (CY16-17) & VOCA one-time) 32 New 5/4/2016 - 12/2/2016	56	26	0	\$ 3,475,227.00	Dashboard Program Setup
Office of Adult and Juvenile Justice Assistance 2017-2018 State Juvenile Diversion Program & Marijuana Tax Cash Funds 14 New 10/11/2016 - 11/10/2016	28	6	0	0	Dashboard Program Setup
Office of Adult and Juvenile Justice Assistance 2016-2017 State Juvenile Diversion Program & Marijuana Tax Cash Funds Transition 11/16/2015 - 9/28/2016	29	1	0	\$ 1,641,139.00	Dashboard Program Setup

B. Open the Application

1. From the **Dashboard** page click on **Applications**.
2. Applications will be in **Submitted Applications**. **Note:** you will only set up report tracking tasks for approved projects.
3. Notes on Filters:
 - a. Use your filter button to find only Approved applications.
 - b. If you can't find something, clear your filters.



Colorado Division of Criminal Justice
Office of Adult and Juvenile Justice Assistance
2016 OAJJA Transition (JAG, NCHIP, COV)

My Account | Dashboard **Applications** Scoring Funding Allocations Financial Reporting Data
Program Setup

Applications

Submitted Applications Organizational Details Incomplete Applications

4. Click on the name of the **Application**.

Submitted Applications Organizational Details Incomplete Applications

- Submitted Applications
- 19th Judicial District Probation Department**
2016-DJ-16-013659-04-1 / JAG16 19th Judicial Probation SPACKLE for Mentally Ill
- Adams County**
2016-DJ-16-013907-06-2 / Adams County CJCC JIS Federated Portal
- Aurora Judicial Administration - Aurora Municipal Court**
2016-DJ-16-013591-02-3 / Aurora Cross Jurisdictional Mental Health Wellness Court Planning Grant

C. Open the Task tab & Create Tasks

Once an individual application is open you have access to the application tabs. Click on the **Tasks** tab.

Colorado Division of Criminal Justice
Office of Adult and Juvenile Justice Assistance
2016 OAJA Transition (JAG, NCHIP, COV)

My Account | Dashboard | Applications | Scoring | Funding Allocations | Financial | Reporting | Data | Program Setup

Adams County
2016-DJ-16-013907-06-2 / Adams County CJCC JIS Federated Portal
\$ 42,500.00 \$ 42,500.00 Requested

Application Application Summary Organizational Details Questions / Statement of Work Budget Summary Tables (G&O, Budget Details, Additional Funding) Documents Extra

Post-Decision Grant Agreement Financial Report (Post Award Submissions) **Tasks**

Official Decision ✓ Approved \$ 42,500.00 Review Tools

Tasks

1. Enter the first task based on the task list. Each Grant Program will have a different reporting schedule and therefore a different task schedule. See the appendix for the standard task listings.

Sample task list:

Task Setup			
10/01/2016 to 09/30/2017			
#	Title	Due	Assigned To
	[insert Grant Number] - Financial Report (1-A) - Quarterly - Oct-Dec 2016	01/30/2017	Financial Manager
	[insert Grant Number] - Narrative Report - Quarterly - Oct-Dec 2016	01/30/2017	Program Manager

Entry in ZoomGrants:

Tasks

Title
2016-DJ-16-013907-06-2 - Financial Report (1-A) - Quarterly - Oct-Dec 2016

Due 01/30/2017 **Assigned to** Cindy A. Johnson

Description
Review & Approve Financial Quarterly Report
This should be on Report Tab #1

Completed	Due	Title	Assigned to
None exist.			

2. Select **Add to Tasks**

Note: ZG is “glitchy” at this stage. I do not know why, but it will just keep flashing the “Saving....” Button.

Tasks

Title 2016-DJ-16-013907-06-2 - Financial Report (1-A) - Quarterly - Oct-Dec 2016

Due 01/30/2017 **Assigned to** Cindy A. Johnson

Description
Review & Approve Financial Quarterly Report
This should be on Report Tab #1

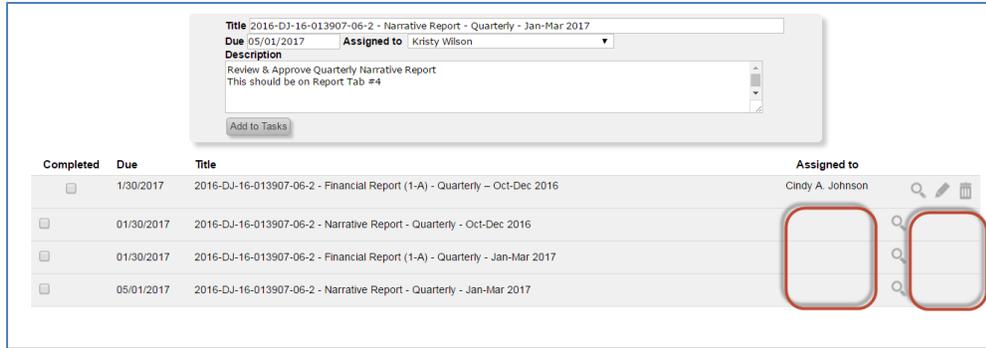
Completed	Due	Title	Assigned to
None exist.			
<input type="checkbox"/>	01/30/2017	2016-DJ-16-013907-06-2 - Financial Report (1-A) - Quarterly - Oct-Dec 2016	

3. Double-Click anywhere on the page to get out of this loop. Once you double-click your entry will appear as a task below and the information will remain in the entry box.

4. Enter the next task by overwriting the text in the entry box and repeating step 2.

5. Continue until all tasks are entered.

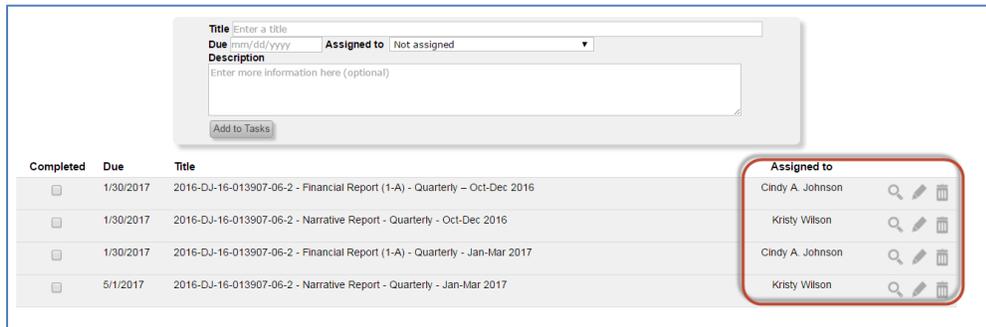
- a. Another “glitch” item is that not all the fields will appear while you are entering the information using the process above.



Refresh the browser using the browser refresh button. This may look different depending on the browser you are using.



Once you refresh, you will be taken back to the **Application Summary** tab. Click on the Task tab again to return. The task should now have the complete information that you entered.



6. Once all tasks are complete refresh and make sure the list is complete.

D. Update Internal Research Question

1. Go to the **Application Summary** tab.

Colorado Division of Criminal Justice
Office of Adult and Juvenile Justice Assistance
2016-2017 State Juvenile Diversion Program & Marijuana Tax Cash Funds Transition

My Account | Dashboard | Applications | Scoring | Funding Allocations | Financial | Reporting | Data | Program Setup

Center for Family Outreach Inc.
2017-DV-17-010289-08 / Juvenile Diversion Program for Larimer County - Year 3
\$ 63,251.00 \$ 63,251.00 Requested

Application | **Application Summary** | Pre-Application/Organizational Details | Questions / Statement of Work | Budget Summary | Tables | Documents | Extra

Post-Decision | Grant Agreement | Financial | Report (Post Award Submissions) | Tasks

Official Decision | ✓ Approved | \$ 63,251.00 | Review Tools

Application Summary

2. Scroll down to the **Internal Research Questions**
3. Find the field **“Reporting Tasks entered”** and enter **your name and date**. Click out of the field to save.

Note: the internal research questions are different for each grant, but this question will be present on all.

**Your answers will be saved automatically when a change is made*

DCJ Grant Number (on Payment Request)
2017-DV-17-010289-08

Match Required (on Payment Request)
Yes

Financial Grant Manager (on Payment Request)
Gary Fugo

Funding Entity Type (on Payment Request)
State of Colorado

Payment Frequency (on Payment Request)
Monthly

Match Percentage
25.00%

Type of Funding for this Project (New vs Continuation)
Continuation

Reporting Tasks entered?

Appendix I: 2016 Colorado Justice Assistance Grant -Task Setup

Standard Task Setup for the **Colorado Justice Assistance Grant 2016** with a standard award period of: **10/01/2016 to 09/30/2017**.

Note: Tasks will change if the award period is something other than what is listed above. The Grant Program Manager (GPM) & Grant Financial Manager (GFM) will need to determine the tasks listing for those grants.

Title	Due	Assigned To	Description
[insert Grant Number] - Financial Report (1-A) - Quarterly – Oct-Dec 2016	01/30/2017	Financial Manager	Review & Approve Financial Quarterly Report This should be on Report Tab #1
[insert Grant Number] - Narrative Report - Quarterly - Oct-Dec 2016	01/30/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #2
[insert Grant Number] - Financial Report (1-A) - Quarterly - Jan-Mar 2017	05/01/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #3
[insert Grant Number] - Narrative Report - Quarterly - Jan-Mar 2017	05/01/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #4
[insert Grant Number] - Financial Report (1-A) - Quarterly - Apr-Jun 2017	07/31/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #5
[insert Grant Number] - Narrative Report - Quarterly - Apr-Jun 2017	07/31/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #6
[insert Grant Number] - Financial Report (1-A) - Quarterly – Jul-Sep 2017	10/30/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #7
[insert Grant Number] - Narrative Report - Quarterly - Jul-Sep 2017	10/30/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #8
[insert Grant Number] - Financial Report (1-A) - Final	11/30/2017	Financial Manager	Review & Approve Final Financial Report This should be on Report Tab #9
[insert Grant Number] - Narrative Report - Final	11/30/2017	Program Manager	Review & Approve Final Narrative Report This should be on Report Tab #10
[insert Grant Number] – Review & Setup any additional Tasks	01/30/2017	Program Manager	General tasks have been setup for you. Review GPM tasks and add any additional tasks to accommodate any other project specific forms. (e.g. Forms 16, 5, 13, 30, 1-B, etc.)
[insert Grant Number] – Complete Closeout Checklist	01/15/2018	Program Manager	Complete Paper Closeout Checklist. Attach to ZG.
[insert Grant Number] – Complete Closeout Checklist	12/15/2017	Financial Manager	Complete Paper Closeout Checklist & Attach to ZG. Closeout Grant & Send notification to grantee
[insert Grant Number] – Approve Closeout	02/15/2018	Meg	Double check the closeout

Appendix II: 2016 National Criminal History Improvement Program - Task Setup

Standard Task Setup for the [National Criminal History Improvement Program 2016](#).

- 2016-RU-16-013702 / 2016 Criminal History Update – (7/1/17 to 6/30/18) - see task list below
- 2016-RU-16-013701 / 2016 Rap Y – (7/1/17 to 6/30/18) - see task list below
- 2016-RU-16-013777 / Convert DA to ACTION – (10/1/16 to 9/30/17) - follow JAG 16 task list above

Title	Due	Assigned To	Description
[insert Grant Number] - Financial Report (1-A) - Quarterly – Jul-Sep 2017	10/30/2017	Financial Manager	Review & Approve Financial Quarterly Report This should be on Report Tab #1
[insert Grant Number] - Narrative Report - Quarterly – Jul-Sep 2017	10/30/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #2
[insert Grant Number] - Financial Report (1-A) - Quarterly - Oct-Dec 2017	01/30/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #3
[insert Grant Number] - Narrative Report - Quarterly - Oct-Dec 2017	01/30/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #4
[insert Grant Number] - Financial Report (1-A) - Quarterly - Jan-Mar 2018	04/30/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #5
[insert Grant Number] - Narrative Report - Quarterly - Jan-Mar 2018	04/30/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #6
[insert Grant Number] - Financial Report (1-A) - Quarterly – Apr-Jun 2018	07/30/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #7
[insert Grant Number] - Narrative Report - Quarterly - Apr-Jun 2018	07/30/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #8
[insert Grant Number] - Financial Report (1-A) - Final	08/30/2018	Financial Manager	Review & Approve Final Financial Report This should be on Report Tab #9
[insert Grant Number] - Narrative Report - Final	08/30/2018	Program Manager	Review & Approve Final Narrative Report This should be on Report Tab #10
[insert Grant Number] – Review & Setup any additional Tasks	01/30/2017	Program Manager	General tasks have been setup for you. Review GPM tasks and add any additional tasks to accommodate any other project specific forms. (e.g. Forms 16, 5, 13, 30, 1-B, etc.)
[insert Grant Number] – Complete Closeout Checklist	11/15/2018	Program Manager	Complete Paper Closeout Checklist. Attach to ZG.
[insert Grant Number] – Complete Closeout Checklist	10/15/2018	Financial Manager	Complete Paper Closeout Checklist & Attach to ZG Closeout Grant & Send notification to grantee
[insert Grant Number] – Approve Closeout	12/15/2018	Meg	Double check the closeout

Appendix III: 2016 Paul Coverdell Forensic Sciences Program - Task Setup

Standard Task Setup for the [Paul Coverdell Forensic Sciences Program 2016](#) with a standard award period of: [01/01/2017 to 12/31/2017](#).

Note: Tasks will change if the award period is something other than what is listed above. The Grant Program Manager (GPM) & Grant Financial Manager (GFM) will need to determine the tasks listing for those grants.

Title	Due	Assigned To	Description
[insert Grant Number] - Financial Report (1-A) - Quarterly – Jan-Mar 2017	05/01/2017	Financial Manager	Review & Approve Financial Quarterly Report This should be on Report Tab #1
[insert Grant Number] - Narrative Report - Quarterly - Jan-Mar 2017	05/01/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #2
[insert Grant Number] - Financial Report (1-A) - Quarterly - Apr-Jun 2017	07/31/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #3
[insert Grant Number] - Narrative Report - Quarterly - Apr-Jun 2017	07/31/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #4
[insert Grant Number] - Financial Report (1-A) - Quarterly - Jul-Sep 2017	10/30/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #5
[insert Grant Number] - Narrative Report - Quarterly - Jul-Sep 2017	10/30/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #6
[insert Grant Number] - Financial Report (1-A) - Quarterly – Oct-Dec 2017	01/30/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #7
[insert Grant Number] - Narrative Report - Quarterly - Oct-Dec 2017	01/30/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #8
[insert Grant Number] - Financial Report (1-A) - Final	03/01/2018	Financial Manager	Review & Approve Final Financial Report This should be on Report Tab #9
[insert Grant Number] - Narrative Report - Final	03/01/2018	Program Manager	Review & Approve Final Narrative Report This should be on Report Tab #10
[insert Grant Number] – Review & Setup any additional Tasks	01/30/2017	Program Manager	General tasks have been setup for you. Review GPM tasks and add any additional tasks to accommodate any other project specific forms. (e.g. Forms 16, 5, 13, 30, 1-B, etc.)
[insert Grant Number] – Complete Closeout Checklist	04/15/2018	Program Manager	Complete Paper Closeout Checklist. Attach to ZG.
[insert Grant Number] – Complete Closeout Checklist	03/15/2018	Financial Manager	Complete Paper Closeout Checklist & Attach to ZG. Closeout Grant & Send notification to grantee
[insert Grant Number] – Approve Closeout	05/15/2018	Meg	Double check the closeout

Appendix IV: 2016-2017 State Juvenile Diversion Program & Marijuana Tax Cash Funds Transition - Task Setup

Standard Task Setup for the [2016-2017 State Juvenile Diversion Program & Marijuana Tax Cash Funds](#) with a standard award period of: [07/01/2016 to 06/30/2017](#).

Note: Tasks will change if the award period is something other than what is listed above. The Grant Program Manager (GPM) & Grant Financial Manager (GFM) will need to determine the tasks listing for those grants.

Title	Due	Assigned To	Description
[insert Grant Number] - Financial Report (1-A) - Quarterly – Jul-Sep 2016	10/30/2016	Financial Manager	Review & Approve Financial Quarterly Report This should be on Report Tab #1
[insert Grant Number] - Narrative Report - Quarterly - Jul-Sep 2016	10/30/2016	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #2
[insert Grant Number] - Financial Report (1-A) - Quarterly - Oct-Dec 2016	01/30/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #3
[insert Grant Number] - Narrative Report - Quarterly - Oct-Dec 2016	01/30/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #4
[insert Grant Number] - Financial Report (1-A) - Quarterly - Jan-Mar 2017	05/01/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #5
[insert Grant Number] - Narrative Report - Quarterly - Jan-Mar 2017	05/01/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #6
[insert Grant Number] - Financial Report (1-A) - Quarterly – Apr-Jun 2017	07/31/2017	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #7
[insert Grant Number] - Narrative Report - Quarterly - Apr-Jun 2017	07/31/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #8
[insert Grant Number] - Financial Report (1-A) - Final	08/30/2017	Financial Manager	Review & Approve Final Financial Report This should be on Report Tab #9
[insert Grant Number] - Narrative Report - Final	08/30/2017	Program Manager	Review & Approve Final Narrative Report This should be on Report Tab #10
[insert Grant Number] – Review & Setup any additional Tasks	01/30/2017	Program Manager	General tasks have been setup for you. Review GPM tasks and add any additional tasks to accommodate any other project specific forms. (e.g. Forms 16, 1-B, etc.)
[insert Grant Number] – Complete Closeout Checklist	10/15/2017	Program Manager	Complete Paper Closeout Checklist. Attach to ZG.
[insert Grant Number] – Complete Closeout Checklist	09/15/2017	Financial Manager	Complete Paper Closeout Checklist & Attach to ZG. Closeout Grant & Send notification to grantee
[insert Grant Number] – Approve Closeout	11/15/2017	Meg	Double check the closeout

Appendix V: 2017-2018 State Juvenile Diversion Program & Marijuana Tax Cash Funds Transition - Task Setup

Standard Task Setup for the [2017-2018 State Juvenile Diversion Program & Marijuana Tax Cash Funds](#) with a standard award period of: [07/01/2017 to 06/30/2018](#).

Note: Tasks will change if the award period is something other than what is listed above. The Grant Program Manager (GPM) & Grant Financial Manager (GFM) will need to determine the tasks listing for those grants.

Title	Due	Assigned To	Description
[insert Grant Number] - Financial Report (1-A) - Quarterly – Jul-Sep 2017	10/30/2017	Financial Manager	Review & Approve Financial Quarterly Report This should be on Report Tab #1
[insert Grant Number] - Narrative Report - Quarterly - Jul-Sep 2017	10/30/2017	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #2
[insert Grant Number] - Financial Report (1-A) - Quarterly - Oct-Dec 2017	01/30/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #3
[insert Grant Number] - Narrative Report - Quarterly - Oct-Dec 2017	01/30/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #4
[insert Grant Number] - Financial Report (1-A) - Quarterly - Jan-Mar 2018	05/01/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #5
[insert Grant Number] - Narrative Report - Quarterly - Jan-Mar 2018	05/01/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #6
[insert Grant Number] - Financial Report (1-A) - Quarterly – Apr-Jun 2018	07/31/2018	Financial Manager	Review & Approve Quarterly Financial Report This should be on Report Tab #7
[insert Grant Number] - Narrative Report - Quarterly - Apr-Jun 2018	07/31/2018	Program Manager	Review & Approve Quarterly Narrative Report This should be on Report Tab #8
[insert Grant Number] - Financial Report (1-A) - Final	08/30/2018	Financial Manager	Review & Approve Final Financial Report This should be on Report Tab #9
[insert Grant Number] - Narrative Report - Final	08/30/2018	Program Manager	Review & Approve Final Narrative Report This should be on Report Tab #10
[insert Grant Number] – Review & Setup any additional Tasks	07/15/2017	Program Manager	General tasks have been setup for you. Review GPM tasks and add any additional tasks to accommodate any other project specific forms. (e.g. Forms 16, 1-B, etc.)
[insert Grant Number] – Complete Closeout Checklist	10/15/2018	Program Manager	Complete Paper Closeout Checklist. Attach to ZG.
[insert Grant Number] – Complete Closeout Checklist	09/15/2018	Financial Manager	Complete Paper Closeout Checklist & Attach to ZG. Closeout Grant & Send notification to grantee
[insert Grant Number] – Approve Closeout	11/15/2018	Meg	Double check the closeout

