ZOOMGRANTS BOARD/COUNCIL APPLICATION REVIEW TRAINING REVISED 03/06/2018

The Division of Criminal Justice (DCJ) retired the Colorado Grants Management System (COGMS) effective October 2016, and launched ZoomGrants in October 2016. These instructions are intended to assist with the Basic Navigation of Board/Council members during Application Review within ZoomGrants. A supplemental Job Aid will be made available for specific Grant Programs.

ZG Board/Council Training

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I. Log into ZoomGrants

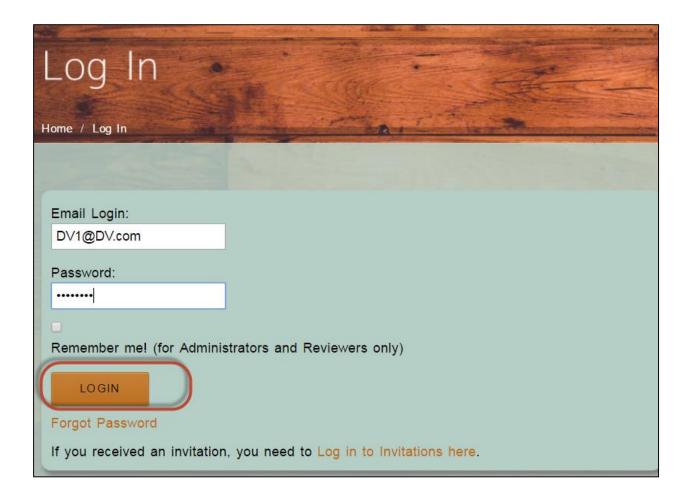
Go to ZoomGrants.com and login using the credentials that were provided to you by DCJ.

Log in to <u>ZoomGrants.com</u>, click on Login in the top right corner. You may use any **up to date** browser (Internet Explorer, Mozilla Firefox, Safari, etc.). Chrome is preferred.



• It is recommended that you use the Remember me! Feature DCJ set up a generic password for you. You may change this at any time to something more secure. If you need to reset your password, click on the Forgot Password option on the main ZoomGrants.com page.

ZoomGrants requires all users to maintain a Security Profile to aid in the retrieval of passwords. If you forget your password, answering those three questions correctly will allow you to reset your password. If you have yet to set up your Security Profile, you will receive your password in an email from Notices@ZoomGrants.com.



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II. ZoomGrants Structure

The ZoomGrants (ZG) structure is a tab system. There are a series of tabs that drill down from general to specific. **Note:** In ZoomGrants the term **Program** is equivalent to a **Funding Opportunity.**

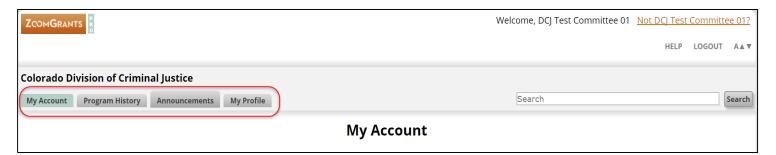
Administrative Tabs: Tabs contain information across all Programs you have access to (i.e. not program specific).

Dashboard/Program Tabs: Tabs contain information across all Applications within a Program that you have access to (i.e. not application specific).

Application/Project Tabs: Tabs contain information to a specific Application.

III. Navigation Administration Tabs

Once you log in, you will see the tabs and Programs that are available to you. This will always be what you see when you log in and is considered your home page. Note: Your tabs will wrap onto a new line if you increase the font size on your page, but the content remains the same.



A. My Account

Provides a quick snapshot of the number of applications Submitted, Incomplete and the Total Awarded for each Program for which you are assigned. It also provides access to the Dashboard.

- Incomplete Applications after the application deadline will NOT be scored.
- Total Awarded will not appear until after the Funding Conference.

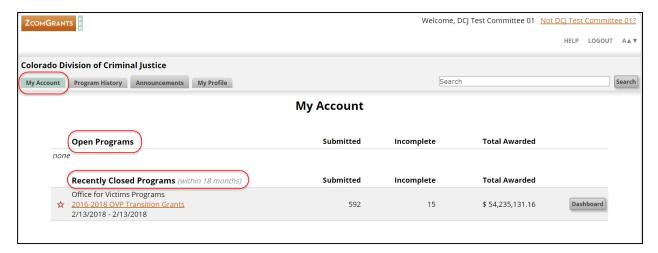
The yellow-highlighted "New" means there are grants that you have not opened or there has been a change in them since you last opened it. This is specific to each user.

Note: In ZoomGrants the term **Program** is equivalent to a **Funding Opportunity**.

- **Programs Waiting to Open: (Not visible in the example below)** The Program has been created, but is not yet accepting applications. Only those programs that you've been assigned to will appear here. *No action required for the Board/Council Reviewer*.
- **Open Programs**: Any Program that is actively accepting applications. Only those programs that you've been assigned to will appear here. *No action required for the Board/Council Reviewer*.

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• **Recently Closed Programs**: The application deadline has passed. Only those programs that you've been assigned to will appear here. *These are the applications that will be scored*.



B. Program History

All Programs (including the current Program for which you are reviewing applications) will appear here. After a Program has been closed for 18 months it will <u>only</u> appear here and <u>not</u> be visible on the My Account tab.

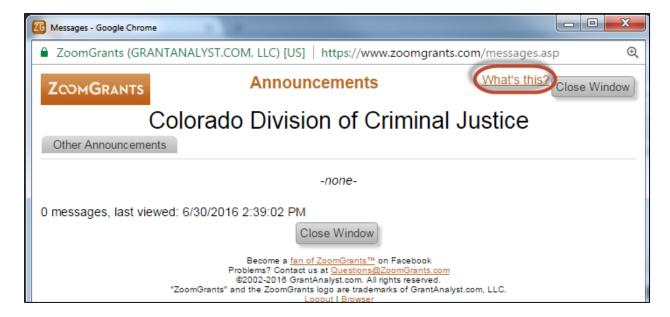
C. Announcements

Announcement will contain important notifications from DCJ to Council members reviewing the Applications. This is also how ZoomGrants will push out announcements, especially new features. Click on the tab and a new pop-up window appears. Pop-up windows may be exited out of by clicking the X button in the top right corner.

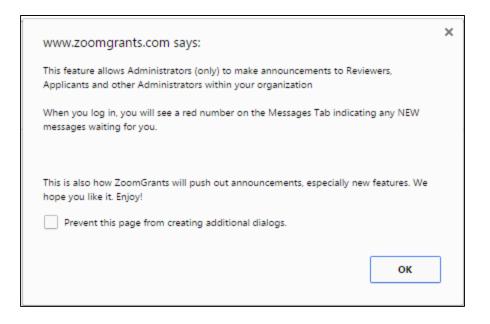


If the windows do not pop-up check the pop-up blocker associated with your browser.

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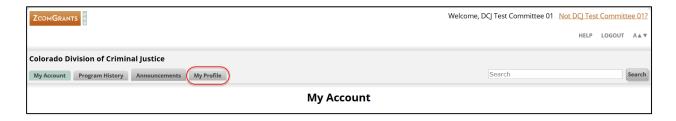
Click on the "What's this?" link:



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D. My Profile

My Profile contains your personal and organizational information. Since Reviewers will be using a generic account that is created for you, we suggested that you DO NOT populate this information. NOTE: If you do populate this information, please keep in mind that your information will be on a generic account that may be repurposed in the future.

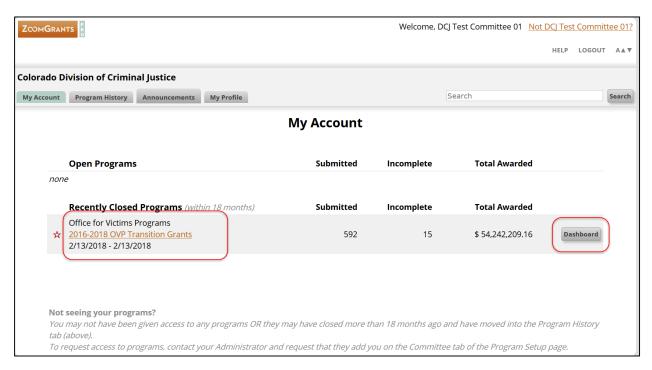


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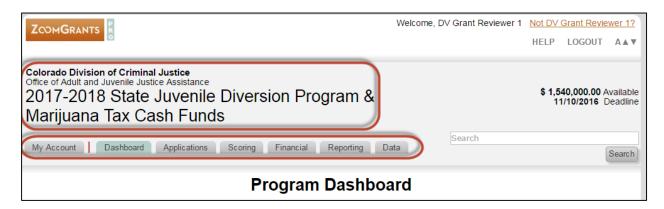


IV. Navigation-Program Tabs

Open the grant Program that contains the grants you will be reviewing. To access a Program Dashboard (Dashboard) you may click on **Dashboard** or the **Hyperlink** of the name of the Program from your Home Page (My Account).



Once you click on Dashboard you will be taken to a series of **Program tabs** for the selected Program. At the top of every page you will see the name of the Program that is open. To return to the Home Page click on My Account.

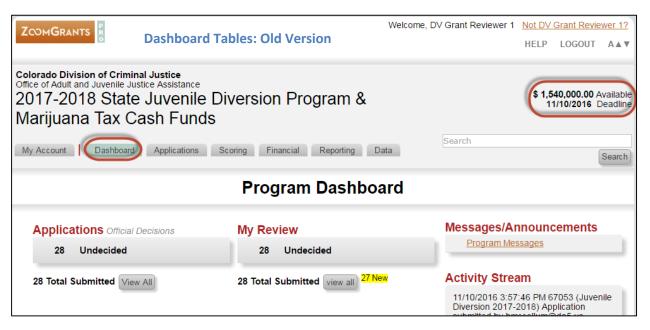


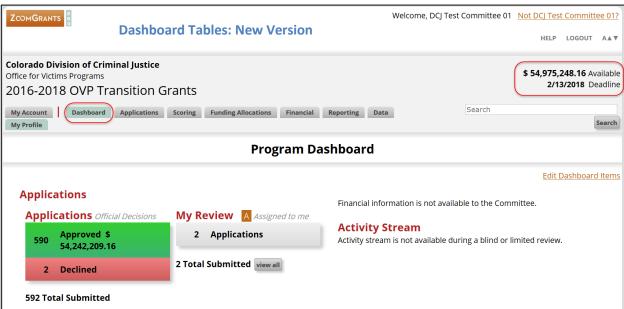
A. Dashboard Tab

The Dashboard tab provides quick links to the applications by a variety of filters. All the Program tabs provide summary data (Available amount and Deadline date) for the Program.

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- **Available**: The amount available (this includes Administrative Funds) and is not the amount that will be granted out to applicants. DCJ staff will inform you of the actual amount available.
- Deadline: The date the applications were due.

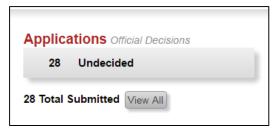




1. Applications - Official Decisions

Applications will be listed as either Undecided, Approved or Declined. This reflects the final Board/Council decision. During your Board/Council Review all Applications will be marked Undecided.

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- Click on **Undecided:** you will go to Submitted Applications, but your filter will be set to Undecided.
- Click **View All:** you will go to Submitted Applications and will see all submitted application regardless of status.

Un-submitted Applications are not visible.

NOTE: Depending on the program you may only see the projects that have been assigned to you. Please the job aid for each particular program for more information.

2. My Review

Applications under My Review will be listed as either Undecided, Approved, Declined, or Abstain/Recuse. Clicking on any category will take you to the Applications tab and apply the filter of the category you selected.

My Review applies only to your review of the record. You will not be able to see other Board/Council member's progress.



that you marked Abstain/Recuse.

- Click on **Undecided:** you will go to the Application Tab and your filter will be set to Undecided.
- Click on **Approved:** you will go to the Application Tab and your filter will be set to Approved.
- Click on **Declined:** you will go to the Application Tab and your filter will be set to Declined.

- Click **View All:** you will go to the Application Tab and will see all submitted Applications regardless of status. **You will need to select this option to view Applications**

NOTE: Depending on the program you may only see the projects that have been assigned to you. Please the job aid for each particular program for more information.

3. Judicial District

This quick link was built by DCJ and maybe different for each grant program; see the job aid for each



particular program for more information. Note: that the quick link takes you to the Applications tab and applies the filter that you selected. In this example: The quick link will take you to all submitted Applications assigned to a particular judicial district.

In this example there are four (4) applications Not Assigned, two (2) applications in Judicial district 9, one (1) application in Judicial district 10, etc.

"NA" is reserved for DCJ Administrative Funds.

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4. Award Classification

This quick link here will take you to all submitted Applications assigned to a particular award



classification. Not all classifications apply to all grant programs, see the job aid for each particular program for more information. Note: that the quick link takes you to the Applications tab and applies the filter that you selected.

In this example there are four (4) applications Not Assigned, one (1) Administrative application, and five (5) Passthrough –

Standard applications.

NOTE: Depending on the program you may only see the projects that have been assigned to you. Please the job aid for each particular program for more information.

5. Grant Program Manager

Grant Program Manager is assigned by the grant manager at various times depending on the grant program, often times it is not done until after the final Board/Council decisions therefore you may not see this populated during your review. This quick links here will take you to all submitted Applications assigned to a particular grant manager.

NOTE: Depending on the program you may only see the projects that have been assigned to you. Please the job aid for each particular program for more information.

6. Project Status

Project Status is assigned by the grant manager at the time the award is setup (after applications are submitted) and updated when the project is closed. This quick link will take you to all submitted Applications assigned to a particular award classification.



In this example there are 378 applications Open and 275 Closed applications. During your Board/Council Review all Applications will be marked Open.

NOTE: Depending on the program you may only see the projects that have been assigned to you. Please the job aid for each particular program for more information.

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7. Saved Reports

Saved Reports will take you to the reports that you created and saved in Data. Not all programs will have saved reports, see the Job Aid associated with the program you are reviewing for any saved reports.



8. Edit Dashboard Items

Each user may tailor your Dashboard. Click on Edit Dashboard Items and a menu will appear and you may uncheck any items that you don't want visible on your dashboard. You may also switch between the Old and New version of the Dashboard Tables. Greyed out checked boxes are permanent and you cannot unselect those.



9. Activity Stream

The Activity Stream contains the latest activities within that program (meaning ALL Projects in this

S/4/2016 9:46:06 AM 61541 (2015-VW-14-008919-05 / Victim Services for Advocates of Lake County (CY (16)) PreApp submitted by Jenny@CO.L.com 8/4/2016 9:31:29 AM 61541 Application created by Jenny@CO.L.com 8/3/2016 3:58:39 PM 61479 (2014-VA-14-008916-14 / Victim Services & Latino/Immigrant Outreach Services (CY 16)) Application submitted by Diane@dcj.com 8/3/2016 1:53:04 PM 60813 (2015-VA-14-008974-09 / Victim Service Project (CY 16)) Report 4 submitted by Julia@dcj.com 8/3/2016 1:51:47 PM 60813 (2015-VA-14-008974-09 / Victim Service Project (CY 16)) Report 3 submitted by Julia@dcj.com 8/3/2016 1:51:47 PM 60813 (2015-VA-14-008974-09 / Victim Service Project (CY 16)) Report 2 submitted by Julia@dcj.com 8/3/2016 1:46-33 PM 60813 (2015-VA-14-008974-09 / Victim Service Project (CY 16)) Report 1 submitted by Julia@dcj.com 8/3/2016 1:55-42 PM 60813-14812 (2015-VA-14-008974-09 / Victim Service Project (CY 16)) Invoice 2016 Payment Request Apr-Jun submitted by S/3/2016 1:24-24 PM 60813-14811 (20... Show More Sortable Version

Add Comment

program). Click Show More to view additional activities or click Sortable Version to open the complete Activity Stream in a new window.

The activity streams shows users and update to the ZG project file/application.

NOTE: This may not populate during a blind or limited review.

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10. Group Messages Sent

This Dashboard item will only appear if a group message has been sent to the Applicants from DCJ staff for the Program you a reviewing.



By clicking on the hyperlink you can see the message details:



11. Map

The map shows the locations of the organizations that submitted applications (Organization information located on the application summary, not the legal entity information collected on the Organizational Details tab). ZoomGrants will update the map after the application deadline passes.



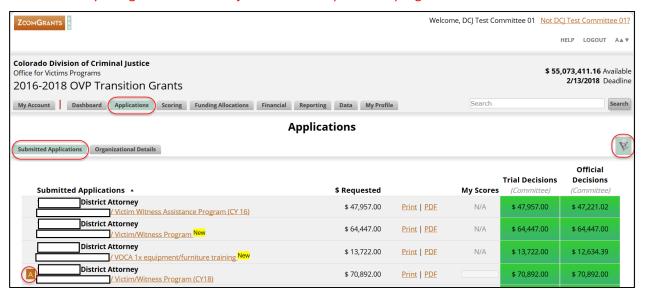
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B. Applications

The Applications tab provides access to all submitted applications for a program. If you click on the Applications Tab you will get an unfiltered view of all the applications. If you used one of the quick links on the Dashboard, then filters will be applied according to the quick link you selected.

Example: If you selected the quick link for all approved application on your Dashboard, you will go to the Applications tab, but only see the Approved Applications.

NOTE: Depending on the program you may only see the projects that have been assigned to you, which are notated by a large 'A'. Please the job aid for each particular program for more information.



The Applications tab contains subtabs for:

- Submitted Application
- Pre-Application/Organization Details

At any time you may use your filters button. Using the quick links on the first page will provide some filtering, but if you want to apply multiple filters, use your filters button. Once you click on the filters button a box will appear, chose the criteria, and select Set Filter. Your filters will be applied.

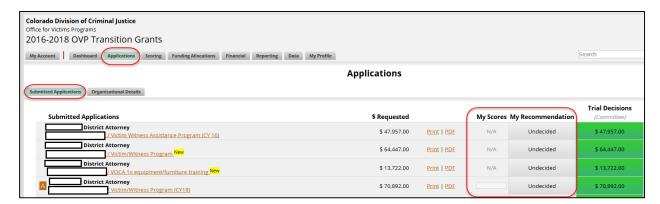
You also have the option to clear your filters to view all the applications under a specific tab (submitted, pre-app, incomplete). If you can't find a project clear your filters.

1. Submitted Applications

The Submitted Applications tab provides an overview of all submitted applications and the corresponding Requested amount, Votes, My Score, Trial decision, Official decision; as well as the ability to open, print, or pdf an individual project/application.

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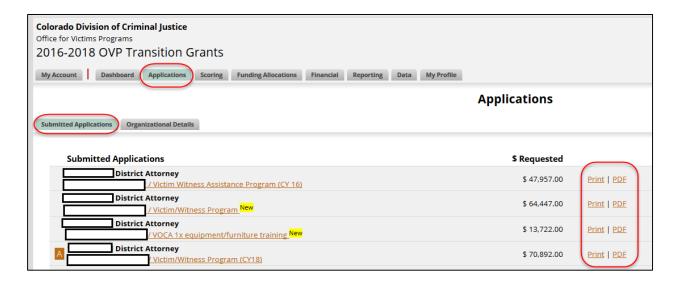
NOTE: Depending on the program you may only see the projects that have been assigned to you. Please the job aid for each particular program for more information.





Open, Print, or PDF an application

Click on the appropriate hyperlink to Open, PDF or print an application/project.



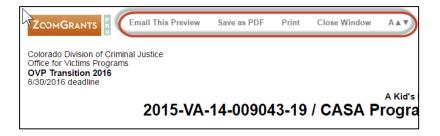
Open an Application:

Click on the name of the Application to open it. This will allow you to view all aspects of a particular application/project. Scoring is done within the Application; therefore, each application should be opened and reviewed prior to scoring. See section V. Application/Project Tabs for more information on scoring.

Print an Application:

This opens a pop-up box and contains ALL the project information for particular project. From this pop-up window you may Email, save, print, etc.

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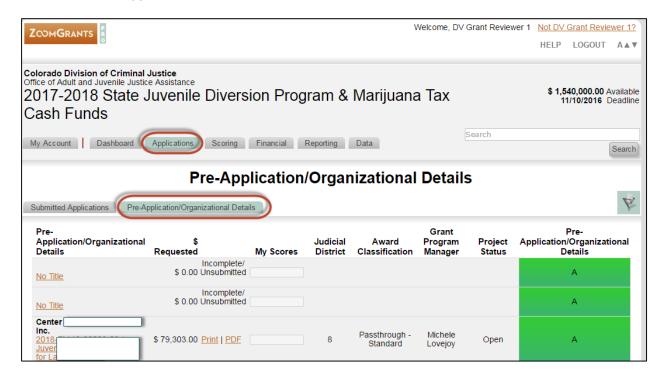


PDF an Application:

This creates a PDF of the ALL the project information for particular project.

C. Pre-Application/Organizational Details

The Pre-Application/Organization Details tab shows information for submitted and un-submitted Applications. As a reviewer, you do not need to utilize this tab unless you want to. It is just another way to view/filter the applications.

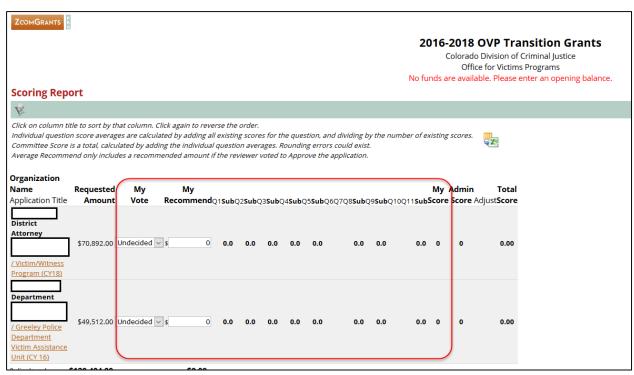


D. Scoring

Clicking on the Scoring tab will launch a new pop-up window that allows you to score/update in bulk, and to view a snapshot of your review outcomes. **See section V. Application/Project Tabs for more information on scoring.**

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See section V. Application/Project Tabs for more information on scoring.

My Vote: Each application may be marked as: Undecided, Approved, Denied, or Abstain/Recuse. The status will update after you enter your recommendation for a particular project.

My Recommend (ed amount): Is the amount of grant funding you recommend for each application. Not all grant programs will have this field visible.

My Score: As a reviewer you may have up to 20 questions to answer to score the Application. The content, number and usage of scoring criteria may vary from grant program to grant program. In this example there are ten (10) questions Q1, Q2, etc.

Admin Score: Reflects DCJ staff scoring. Each grant program will utilize these questions differently and may or may not have them populated at the time of your review.

E. Financial, Reporting & Data

These tabs will not be used during the Board/Council Application Review process.

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F. My Profile

My Profile contains your personal and organizational information. Since Reviewers will be using a generic account that is created for you, we suggested that you DO NOT populate this information. NOTE: If you do populate this information, please keep in mind that your information will be on a generic account that may be repurposed in the future.

V. Application Tabs

You may open an Application from several different places as seen in the above instructions. Regardless of how you open the Application, you will always see the same information. There are a series of tabs associated with each Application.

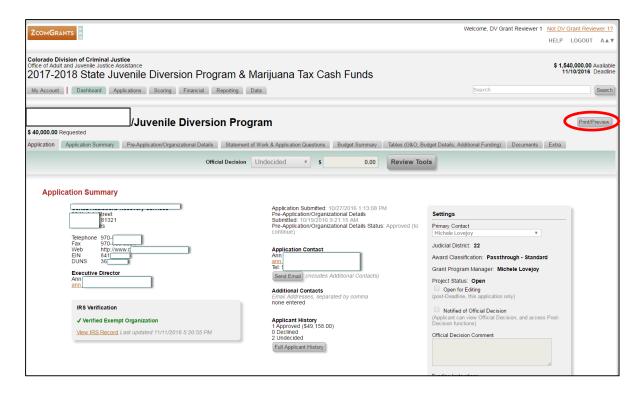
Once you open an Application there are Program tabs at the top and another row of Application Tabs below. The Application Tabs are specific to the Application you have open. To move from one application to another use the Program Tabs. To move within and application use the Application tabs.



A. Application Summary

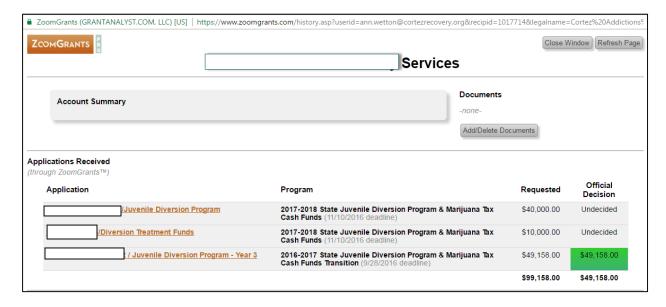
Once you open an application, you will be on the Application Summary page. This tab contains basic information about the grantee and the application. An easy way to view the entire application without tabbing through the application is to use the Print/Preview button. This generates a PDF of all the information on each of the tabs.

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Send Email: This functionality is part of ZG, but not DCJ policy. Please do not send an email to the grantee.

Full Applicant History: Launches a pop-up window with a history of the grantee's funding/applications through DCJ since the start of ZoomGrants. This information may show grant programs other than the grant program you are reviewing.



Add/Delete Documents: This functionality is part of ZG, but not DCJ policy. Please do not add or deleted Documents on this page.

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1. Header Information- Located on each tab

Once you open an application you will see header information for the project you have opened.



2. Official Decision

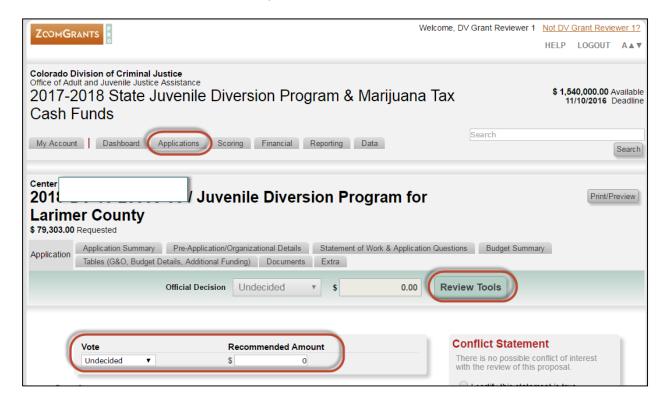
The **Official Decision** is populated by DCJ grant managers after the Board/Council has completed the application reviews and the appropriate funding meeting/final decisions have been made.

3. Review Tools

This opens the scoring tab for this project. There is not a specific tab for the Review Tools. You must drill down to the Review Tools from the application Header underneath the Application Tabs. Depending on the grant program you may be prompted to enter Trial Information. See the job aid to see if Trial scores are used with the program you are reviewing.

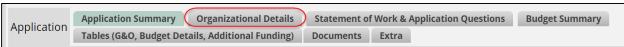
To return to the rest of the application click on any Application tab.

See the Job Aid to determine how to complete this section.



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B. Organizational Details



Often times a grantee will have a Legal Entity Name that is different than the doing business as name and we need to capture both. This tab collects legal entity information.

C. Statement of Work & Application Questions



This section contains all the Application questions with the exception of those housed in Budget Summary, Tables, and Documents.

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

D. Budget Summary



This section contains a snapshot of the Budget, the budget details are part of tables 2 & 3 (Personnel: Budget & Budget Narrative Details & Non-Personnel: Budget & Budget Narrative Details) under the Tables Tab.

E. Tables



This section contains six (6) different tables. The Tables tab editing ability is controlled by the grant manager who may open up columns for editing at specific times.

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

1. Goals & Objectives

Goals and Objectives related to the project are housed here.

2. Personnel: Budget & Budget Narrative Details

Personnel Budget details are housed here.

3. Non-Personnel: Budget & Budget Narrative Details

All other Budget Details, excluding personnel, are housed here.

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4. Additional Project Funding

This table provides information about the applicant's use of additional funds to support the project described in the application.

5. Prior Funding for the grant project

If the grantee has received prior funding for the application put forth it should be located here.

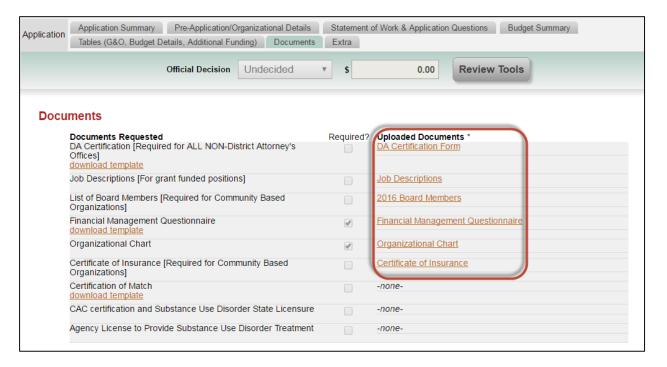
6. Additional Financial Details

This allows grantees to expand on whether or not they are Continuation Applicants or New Applicants.

F. Documents



All the documents that the applicant was required to attach will be attached here. You open each attachment by clicking on the hyperlink associated with the document. This will open a pop-up window with the ability to open the document.



G. Extra

Is not being utilized.

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