



NEW: SSA Fiscal Agent Management

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The new Shared Service Arrangement (SSA) Fiscal Agent Management feature provides fiscal agents a more efficient way to handle grant budget revision requests and reimbursement requests from SSA members. ESCs and LEAs can both serve as a fiscal agent.

District Administration > Tables > Electronic Signatures

☐ Added **GP** to the application list allowing the upload of electronic signatures to be used in the Grants and Projects application.

Tables > Electronic Signatures

Save

Signature Name: Browse

Password:

File Name:

AR ☐ FIN ☐ **GP** ☐ HR ☐ PUR ☐ WHSE ☐

Delete	Signature Name	File Name	AR	FIN	GP	HR	PUR	WHSE
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Grants and Projects > Tables > Grants and Projects Table

☐ Renamed this menu item from Grants and Projects Tables to Grant/Project Profile.

Grants and Projects > Tables > SSA Grants > Grant Types

□ Added this tab to allow fiscal agents to maintain a list of grant types and descriptions, which can be used to facilitate the appropriate workflows and member notifications for each grant type.

Grants and Projects > Tables > SSA Grants > Payment Dates

□ Added this tab to allow fiscal agents to maintain a list of cut-off dates and expected payment dates for each grant type per member.

☐ Added this page to create and maintain the sequence or hierarchy of approvers for member grant budget revision requests and reimbursement requests.

Tables > SSA Approval Path

Grants And Projects

Save

Grant Type: Retrieve

Reminder Days:

**Note - If Reminder Days value is greater than zero, Approver has that many days in order to respond to Approval before reminder email is sent to Approver. Subsequent emails will be sent daily after initial email. **

WARNING
Changing the approval path will update all pending requests for the selected Workflow Grant Type when the Save button is clicked. Please inform all users to halt all workflow processing prior to save.

Grant Type:

Approver	Email Opt-Out
No Rows	

** DRAG-AND-DROP **
Press and hold down the left mouse button on the desired row to "Grab" it. "Drag" the row to the desired location. "Drop" the row by releasing the mouse button.

☐ Added this page to assign alternate approvers to approvers who are unable to perform their assigned approval duties during a specified timeframe for member grant budget revision requests and reimbursement requests.

Tables > SSA Alternate Approvers
 Grants And

Grant Type:

Grant Type:

Clear	Approver Emp Nbr	Approver Name	Use Alternate	Alternate Emp Nbr	Alternate Approver Name	From Date	To Date
No Rows							

Grants and Projects > Tables > SSA Members > Member Information

☐ Added this tab to allow fiscal agents to maintain member data records.

Tables > SSA Members
 Grants And Projects

Member:

MEMBER INFORMATION

BANK CODE

Member Information:

County District Nbr:
Member Name:

Region:
Vendor:

Status:

Main Contact:

Contact Name:
E-mail:

Title

First

Last

Grants and Projects > Tables > SSA Members > Bank Code

☐ Added this tab to allow fiscal agents to maintain bank information for members receiving payments via electronic funds transfer. In addition, the fiscal agent can use the Security Administration application to limit the users who can access this information.

Tables > SSA Members Grants And Projects

Save

Member: Retrieve Directory Add

MEMBER INFORMATION BANK CODE

Bank Information:

EFT E-mail:

Delete Bank Bank Acct Nbr Bank Acct Type PreNote

☐ ☐

Grants and Projects > Tables > Manage Users

☐ Added this page to manage MemberPortal user accounts. Member users can create an account via the MemberPortal; however, they will not have access to any grant information until the fiscal agent completes their user profile on this page.

Tables > Manage Users Grants And Projects

Save Add User

Users:

First Name: Last Name: Retrieve Clear

Member: Admin: ☐ Include Inactive: ☐

Results:

Delete	Detail	▲First Name	Last Name	Member	Status
First	◀	<input type="text"/>	/0	▶	Last

Grants and Projects > Maintenance > Member Grants > Grant Maintenance

☐ Added this tab to allow fiscal agents to view and maintain various details related to a specified grant year, ID, type, or member (county district) record.

Home Maintenance > Member Grants
 Grants And

Year: Grant ID:

GRANT MAINTENANCE

OBJECT MAINTENANCE

Year: Grant ID:

Member: Status:

Grant Type:

Expense Account:

Fund

Func

Obj

Sobj

Org

-----Prog-----

Dates

Begin Date:

End Date:

Reserve

Reserved Percent:

Reserved Amount:

Final Report

Due Date:

Processed Indicator: ☐

Summary

Total Award: 0.00

Reimbursements: 0.00

Pending Reimbursements: 0.00

Eligible Remaining: 0.00

Matching Funds: 0.00

Transactions

Detail	Doc	Date	Type	Status	Budget Amount	Reimbursement Amount	Payment Date
No Rows							

Grants and Projects > Maintenance > Member Grants > Object Maintenance

☐ Added this tab to allow fiscal agents to add budget details allocated by object class for a specified year and grant ID.

Maintenance > Member Grants
 Grants A

Year: Grant ID: :

GRANT MAINTENANCE

OBJECT MAINTENANCE

Year: Grant ID: Member:

Object	Total Award	Reimbursements	Pending Reimbursements	Eligible Remaining	Matching Funds	Over Expend %
61XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
62XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
63XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
64XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
65XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
66XX	0.00	0.00	0.00	0.00	0.00	<input type="text" value="0%"/>
Total:	0.00	0.00	0.00	0.00	0.00	<input type="text"/>



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