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Logging In
The AmeriCorps Office of Monitoring WebGrants site can be accessed here:

Pre-Authorized Users
I. You will have received an email with a username and password from either AmeriCorps or WebGrants. Use the username and password to initially log in. After logging in, you will be prompted to change your password to a secure password of your choice that has at least 8 characters and must include at least:
   A. one letter,
   B. one number,
   C. and one symbol
II. Once password has been reset, you will be prompted to login again using the newly created password to enter the WebGrants portal.

Add Additional Users
You can add additional WebGrants users by clicking on the Click here to Register button on the entry screen.
You will be prompted to complete a Registration Form asking for Personal Contact Information and Organization Information. **NOTE: Fields in Red are mandatory fields.**

Once you click **Save Registration Information**, a person in AmeriCorps will review and approve your registration request ensuring that you are associated with the correct organization.
NOTE: Until approval is complete, the new registrant will not be able to login. Once the approval is complete the system will send the new user two automated emails with their Username and Password.

Grantee Dashboard
When you login you’ll immediately see your User Dashboard. The Dashboard sections are standard for all users and cannot be modified. The Primary sections in the Dashboard are:
1. Approaching Deadlines (Next 30 Days)
2. Open for Editing (Due within 30 Days)
3. Recent Correspondence (Due within 30 Days)
4. My Site Visits (Inbox)
5. Organization Compliance

Accessing Grants
1. Select the Grant from the Navigation Bar on the left.
2. Select the grant you are looking for by clicking on the grant.

3. Each active grant will have the following characteristics:
   a. Status: Underway
   b. Grant Components
      i. General Information - The information in this section will be imported.
         1. The Monitoring Officer
         2. Grantee Contact: To select an additional contact within your organization, click on the green Additional Contacts button in the top left of the General Information form.
Note: People will have to have registered and been approved already (see Add Additional Users) to show as an option when selecting Additional Contacts.

ii. Monitoring Activities- This is where the majority of you forms associated with Monitoring will be located

iii. Correspondence – All correspondence conducted between the (A)MO and the grantee in the system will be accessible here.

iv. Monitoring Closeout- This section has not been built out yet.

v. Monitoring Activity Information - This section provides basic information on the Monitoring Activity. Information on the Monitoring Officer (phone number and email) can be found here as well.

Monitoring Activities
1. Select Monitoring Activities under Grant Components

2. In the Monitoring Activities component, you will see all Monitoring Activity types assigned to you. A full AmeriCorps Monitoring will include multiple types of activities throughout the monitoring process.

<table>
<thead>
<tr>
<th>Monitoring Activity Type</th>
<th>Purpose</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Monitoring Activity Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Request</td>
<td>The Document Request is the initial request for compliance documentation.</td>
</tr>
<tr>
<td>Uniform Monitoring Package (UMP)</td>
<td>Once the Documents have been received the MO will review grantee Compliance in the UMP - Monitoring Activity.</td>
</tr>
<tr>
<td>Corrective Action Plan (CAP)</td>
<td>The CAP Monitoring Activities are assigned for each compliance finding that is found in the UMP review. Each CAP will be assigned and tracked separately as some findings may take longer to accomplish and will vary in complexity to complete.</td>
</tr>
</tbody>
</table>

**Note:** Onsite Grantees may have multiple monitoring activities assigned to them.

**Submitting Documents**
Access the Document Request form following the steps listed in the Monitoring Activities section then select corresponding Document Request.

**Monitoring Activity Details**
When you pull up the Monitoring Activity in the Monitoring Activity components, a Monitoring Activity Details summary is the first page you’ll see. This page provides a view of all the forms in the Monitoring Activity and is not editable. To access and edit the forms, click on the green Edit Monitoring Activity button in the top right.

**Editing Forms**
Select the Document Request form below the Component section.
Note: General Information is a default form associated with each Monitoring Activity. This information is pulled from the grant and used to create the Monitoring Activity but is not editable.

### Document and Supplemental Requests

To access the Document and Supplemental Requests, follow the directions above and select the Document Request Form. Document names & descriptions are provided with the instructions above the form.

The first three columns of the Document Request form (Grantee Requested Document Upload, Grantee Notes, and Submitted Status) are completed by the Grantee. **Submitted Status is a required field for all Requested Documents. The grantee must indicate if the document has been Submitted or is Not Applicable to the specific grant type.**
Please Note: Some requested documents may require the grantee to submit more than one file. Due to system constraints only one file can be uploaded in the Requested Document’s Grid. Additional documents can be uploaded in the Additional Documents section below the grid. Please save the additional documents after you are finished editing the grid as you will need to click on the green **Save Grid** button to add additional documents to the Additional Documents section.

### Change Document Uploaded
If the wrong document is uploaded and the grid has not been saved the grantee can change the document uploaded by clicking on the change button.
If the wrong document is uploaded and the grid has been saved the grantee can change the document uploaded by clicking on the green Edit Grid button and clicking upload again. By uploading a new document, you will override the previous document uploaded.

**Add Additional Documents**

To add additional documents, scroll down to the Additional Documentation Multi List. Click the green **Add Entry** button for each document to be uploaded. **Note:** If you do not see the Add Entry button for the Additional Documentation section it is likely the Grid above is in Editing status and needs to be Saved.

Complete all fields in the form.

Once the form is complete, follow the **Save, Mark as Complete, and Submit** Instructions.
Save, Mark as Complete, and Submit

1. When the form is complete select the green **Save** button at the bottom or top of the screen.

Note: There are three (3) more steps to perform before the form is considered complete and ready for Monitoring Officer review.

2. Mark the form as complete by clicking the orange **Mark as Complete** button at the top of the screen.

3. Once all assigned monitoring activities are Marked As Complete and you are ready to submit to the monitoring officer for review, click the orange ‘Submit Monitoring Activity’ button at the top of the Monitoring Activity Details screen.

**NOTE:** Please **do not** click “**Withdraw**” or “**Copy**” buttons.
4. Click “Submit” as the final step to complete your form submission when the “Please Confirm” pop-up message opens.

5. You will receive an email alert confirming that your document has been submitted.

Negotiating a Monitoring Activity
If a Supplemental Document, more information and/or corrected information are needed, the Monitoring Officer will ‘Negotiate’ the Activity. An email notice will be sent to the email of the user on file.
Once you’ve logged into WebGrants, the Home Page (Dashboard>Work Assignments) will show the Activity in the “Open for Editing” section with status “Correcting”. Click on the Monitoring Activity listed and follow the Monitoring Activities instructions.

NOTE: If the form is not on the Home Page, return to the Grant section of this guide and follow those instructions.
Your Monitoring Officer will have notes explaining why the form is in Negotiation status. If a Supplemental Document is requested, follow the “Add Additional Documents” section and choose the requested document from the dropdown list.

Grantee UMP/CAP Forms
Once the (A)MO has completed the review of submitted documentation they will send a Monitoring Report to the grantee. If there are compliance findings found while the Monitoring Officer is completing the UMP, the grantee will receive a notification from the (A)MO giving directions on completing the CAP. The (A)MO will create a CAP for each finding. Webgrants will notify the grantee of a pending CAP Due date at the following intervals 15, 5, and 1 days prior to due date as well as 1, and 5 days after due date.
Access UMP/CAP Form
You can access the UMP/CAP form in two ways:
1. Follow the directions above (Grant, Monitoring Activities, Monitoring Activity Details, Editing Forms) to access the UMP/CAP Form.
2. Click on the UMP/CAP under Recent Negotiation section of the Dashboard. Follow the directions in Monitoring Activity Details, Editing Forms above.

Grantee CAP Form
All Corrective Action Plan Forms consist of the following components:

UMP Question & Issue Statement

Root Cause

- What is causing the problem at hand?
- Are there flaws in the work processes that led to the issues?
- Has this type of issue occurred before and, if so, what caused it to reoccur?
- What should actually be happening?
Required Plan of Action

Describe the procedures used to implement the corrective measures (specific, measurable, attainable, realistic, timebound)

- Who is doing what?
- How will the plan be implemented?
- What supporting documentation will be needed to ensure implementation?

Required Plan of Action:

500 character(s) left

Evaluation/Follow-Up

How will grant recipients know if corrective measures are working or not?

- What is the plan/procedure to evaluate the plan implemented?
- How often will the plan be evaluated?
- What are the desired results?

Action Plan:

500 character(s) left

Planned to submit date:

Person(s) Responsible for Implementation:

Planned to Submit Date

Person(s) Responsible for Implementation

Planned to submit date:

Person(s) Responsible for Implementation:

Document uploads needed?: Yes No
If the grantee indicates that they have documents to upload, they can attach up to 10 documents.

Save, Mark as Complete, and Submit
Once the form is complete, follow the Save, Mark as Complete, and Submit Instructions.

FAQ
What is the + Add Monitoring Activities button for in Monitoring Activities?
There is a green button at the top of Monitoring Activities component labeled + Add Monitoring Activities, this button is hard coded into the system and we were unable to remove/hide it in the grantee portal. Please do not assign additional Monitoring Activities to your organization, as there is no need to add activities.
If you have already added an additional Monitoring Activity you can reach out to your monitoring representative to request the Monitoring Activity be removed.

**What are the Copy and Withdraw buttons for in Monitoring Activity Details?**

There is orange Copy and Withdraw buttons on the top of the Monitoring Activity Details page, these buttons are hard coded into the system, and we are unable to remove/hide them in the grantee portal. Please do not Copy or Withdraw your Monitoring Activity.

If you have erroneously clicked on these buttons, please notify your monitoring representative.

**Why do I get an error message?**

While there are multiple reasons an error message may occur, we have noticed with Webgrants that if you click between screens too fast and do not allow the screen to finish loading this may lead to the message below. This message can be avoided by allowing the screens to fully load.
If you are getting a different error message and you think you’re experiencing a different issue, please reach out to your monitoring@cns.gov.