Applicant and Grantee

Grants Management System (GMS)

User Guide

11/1/2022

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Applicants

If you are already a Registered User, skip to Applicant is Registered in DOEE Grants Management System.

Applicant is New to DOEE's Grants Management System

Step 1: From the Active Grants Application Portal, Click [New User]

You will be brought to a page where you will be asked to register your organization. The fields that have red asterisks after it is required.

Welcome to DOEE

ORGANIZATION INFORMATION

All applicants should complete each field with organizational information.

Organization Name

Acronym *

EIN NO. *

UEI

DBA

Organization Fiscal Year

FY Start

mm-dd-yyyy

FY End

mm-dd-yyyy

Fiscal Year
thru

Mailing Address

Search for an address

Street 1

Street 2

City

Select a State/Region...

Postal Code

Website

Eligibility

☐ Nonprofit Organization

☐ Faith-based Organization

Step 2: Include the following in the appropriate fields (see the corresponding red letters):

- **A.** The name of your organization.
- **B.** The acronym your organization uses. (If your organization is awarded a grant, this acronym becomes part of your Grant Award Notification [GAN] number.)
- **C.** Your Employer Identification Number or Federal Tax Identification.
- **D.** The Unique Entity Identifier (UEI) is a 12-character, alphanumeric value that serves as the official identifier for doing business with the U.S. Government. For more information regarding a UEI, go to sam.gov.
- **E.** If your organization is doing business as (DBA) or using a name different than what you put in the Organization Name field, put that name in the DBA field.

Organization Name		Acronym *
A.		**B.**
EIN NO. *		UEI
C.		**D.**
DBA		
E.		

Step 3: In the Organizational Fiscal Year fields, select the month and day your agency's current fiscal year begins and the month and day it ends. The Fiscal Year below the FY Start calendar box will auto-populate your organization's fiscal year.

Organization Fiscal Year

FY Start	FY End
mm-dd-yyyy 📅	mm-dd-yyyy 📅

Fiscal Year
thru

Step 4: Enter your organization's mailing address in the first line to search for your organization. As you begin typing, the database will search for the correct address. Select the correct address. The address will auto-populate the second and last fields. Be sure to include any information in the third field, such as suite, room, or floor number in the third field. A map of your organization's location will appear next to the address.

Mailing Address

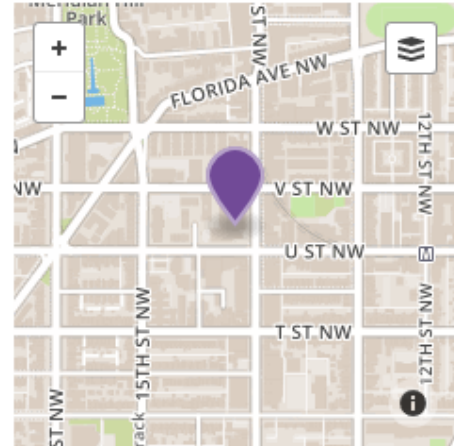|	
Search for an address	
2000 14th Street Northwest	
Suite 200	
Washington	
District of Columbia	20009

Step 5: Put your organization's website in the website field.

Step 6: Check your organization's eligibility:

Please note, a nonprofit organization is a tax-exempt or charitable organization with IRS 501(c)(3) or 501(c)(4) determinations.

Eligibility

☐ Nonprofit Organization

☐ Faith-based Organization

☐ Government Agencies

☐ Universities/Educational Institutions

☐ Private Enterprises

Step 7: Click the box if your organization is a Certified Business Enterprise (CBE).

If your organization is a CBE, you must upload a copy of your certificate from the Department of Small and Local Business Development (DSLBD).

> Don't know if your organization is a CBE or qualifies as one, find more information at https://dslbd.dc.gov/page/get-certified.

Click here if your organization is a Certified Business Enterprise and upload evidence of the DSLBD certificate.

☐ Certified Business Enterprises

CBE Certificate

Choose File | No file chosen

Step 8: **Click here if your organization is a registered vendor with DC Government**

☐ Yes

☐ No

If you don't know if your organization is a registered vendor with DC Government, call the Procurement Center of Excellence at 202-724-4477 and have your Tax ID Number or Social Security Number available. A representative will be able to look up your organization.

Step 9: Begin entering the information about your organization's highest ranking. Enter the first and last name, title, email address, and phone in the appropriate fields.

Please enter the information about your organization's highest officer.

Prefix		First Name *		Last Name *
⌄				

Executive Full Name

Title *

Email Address *   Phone Number *

Step 10: The person completing the online form must complete the section that reads:

Please enter the name of the person completing this form.

☐ The person below attests that he/she is the authorized organizational representative. *

The person completing the form must be an authorized representative of the organization and can submit a grant to DOEE on behalf of the organization.

Click the button that attests that the person completing the form is an authorized organizational representative.

Step 11: Create a login Email Address that all members of your team will use. DOEE recommends something similar to DOEEgrants@yourorganization.org. Click the submit button.

Please note, if awarded a grant, your organization will be required to submit reports and invoices through this system. An email address that includes a person's name will be subject to higher scrutiny during the approval process. Allow two business days to gain access to the system.

Each organization can only have one email address associated with it. You will get an error message if your organization is already registered.

Step 12: You will receive an email thanking you for your submission. This email will also inform you that a notification will be sent to the email you provided with the next steps to access the application.

Step 13: Once approved in the Quick Base system, you receive an email like the one below.
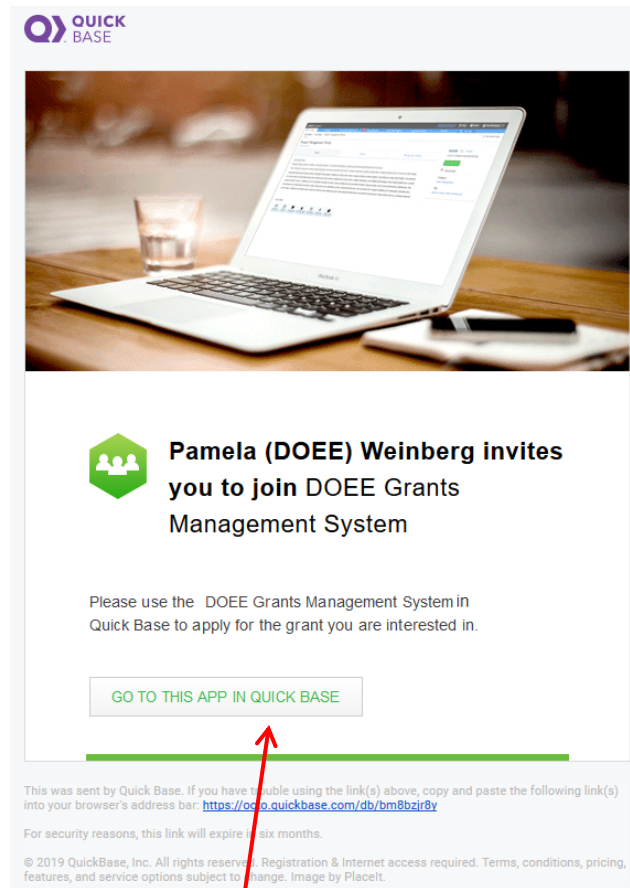
Click the "Go to this App in Quick Base" button.

Step 14: A new screen will open with the First name, Last name and email address of the person who completed the web form auto-populated.

Sign Up for Quick Base

All fields marked with an asterisk (*) are required.

First name *   Elais

Last name *   Nevid

Email address   nevid@verizon.net

Choose a password *

Retype password *

Password strength: _____

✔ Must be at least 8 characters

✔ Must include both numbers and letters

Please set up a security question in case you ever need to reset your password.

Question: *   Select a question...

Answer: *

Retype Answer: *

✔ Security answers must match

Your answer is not case sensitive.

*☐ I have read and agree to the Quick Base Terms of Service and the Quick Base Privacy Policy

Register

Step 15: Create a password that is at least eight characters long. You must include numbers and letters; however, no special characters are required.

Choose a password *

Retype password *

Password strength: _____

✔ Must be at least 8 characters

✔ Must include both numbers and letters

Step 16: Set up a security question by selecting a question from the options in the dropdown window. Type the answer twice to ensure that the answers match each other.

Please set up a security question in case you ever need to reset your password.

Question: *   Select a question...

Answer: *

Retype Answer: *

✓ Security answers must match
Your answer is not case sensitive.

Step 17: Once you have read the Terms of Service and the Privacy Policy, click the box.

I have read and agree to the Quick Base Terms of Service and the Quick Base Privacy Policy
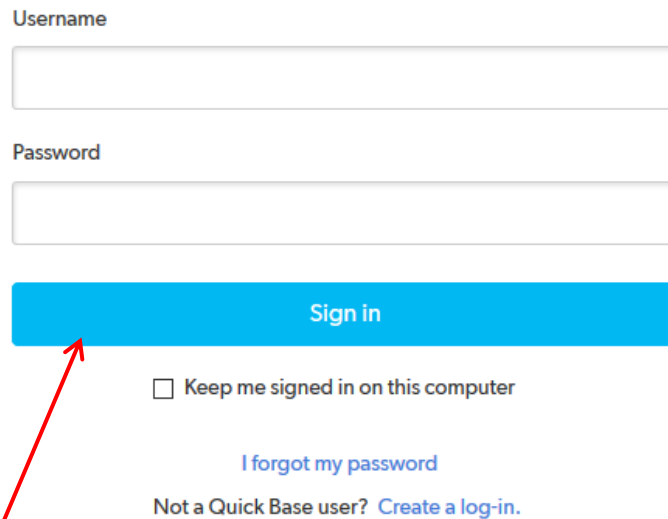
Register

Step 18: Click the register button.

You will be brought to your organization's dashboard.

Please follow the "Responding to an RFA" instructions below.

Applicant Registered in DOEE's Grants Management System

Step 1: Click on the Existing Applicant/Grantee button. You will be brought to the Sign-in screen. Log in with your username (log-in email address) and Password.

Username

Password

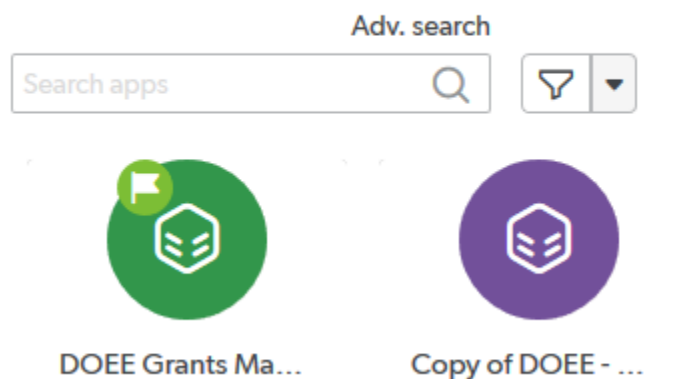Sign in

☐ Keep me signed in on this computer

I forgot my password

Not a Quick Base user? Create a log-in.

Step 2: Click Sign-in.

Step 3: You will be brought to a page that reads "My apps". Click on the DOEE Grants Management System.

My apps

Adv. search

Search apps

DOEE Grants Ma…   Copy of DOEE - …

Step 4: You will be brought to your dashboard, which reads "Welcome Applicants." If you do not come to this dashboard, you may be in the system as a grantee. Email DOEE at the RFA email address and request to have your role changed.

Step 5: Continue to Respond to an RFA below.

Responding to an RFA

Step 1: Select Start Your New Application.

Start your New Application

	Organization Name	Acronym	Organization Fiscal Year	Applicant Full Name	Login Email Address	Register User	ADD APPLICATION
✏ 👁	My Test Nonprofit	MTN	130	Ms. Pamela Weinberg	doeegrants@mytestnp.org	Weinberg, Pamela	START YOUR NEW APPLICATION

View your Submitted/ In Progress Applications

	Application Status	Application Number	Project Title	RFA Number.	RFA Full Name	RFA Email Address	RFA Fiscal Year	Date Created	Status Indicator
👁		APP-57-MTN/RFA-FY19-DBD-751	Resilient, Innovative and Affordable Test Project	RFA-FY19-DBD-751	Resilient, Innovative, Affordable Electrification in the District of Columbia	DCElectrificationRoadmap@dc.gov	2019	02-11-2019 11:57 AM	

Step 2: You will be brought to a new page. On that page, under the heading **Select RFA**, select the RFA for which you are applying.

Once the RFA is selected, the information under the heading **Official Application** auto-populates. The information under the heading **Organization Information** will also be auto-populated. Please note, you will not be able to edit the information on this page. If you need to edit your organization's information, go back to the organization page, and follow the direction on page 3.

Step 3: Complete the application as follows:

Section 1. General Information

    A.   In the Project Title box, put the title of your project.

    B.   In the Project Summary box, provide a brief introduction (one or two paragraphs) that summarizes the proposal.

Section 1. General Information

Project Title

Project Summary

Section 2. Eligibility

Please note, you will not be able to update your organization's eligibility.

Section 2.5 Certificate of Good Standing

Upload a copy of your organization's Certificate of Good Standing.

Please note, DOEE requires that the submitted Certificate of Good Standing reflect a date within six months immediately preceding the application's submission. For more information on registering at the DC Department of Licensing and Consumer Protection, log onto CorpOnline, which is accessible via the *Access DC Portal*.

Section 2.6 Certificate of Clean Hands

Upload a copy of your organization's Certificate of Clean Hands. A copy of your organization's Certificate of Clean Hands may be obtained at MyTax.DC.gov.

Section 3. Proof of Non-profit Status

If your organization is tax-exempt, upload a copy of your organization's tax status letter.

Section 4. Financial Documents

A. Audited Financial Statements – If your organization has Audited Financial Statements completed within the past 24 months, upload those statements.
B. Unaudited Financial Documents and IRS Documents – If your organization does not have audited financial statements, then you must upload the following:
     i. Organization's Annual budget
     ii. Balance Sheet
     iii. IRS Filings
     iv. Income Statement

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Section 4.5 W-9

Upload a copy of your organization's W-9

Section 4.6 Indirect Cost Rate Supporting Documentation.

Upload a copy of your organization's

Section 5. SAM Registration

Upload the most recent evidence of your organization's System for Award Management (SAM) registration. For more information, see the RFA and go to www.sam.gov.

Section 6. Insurance

Check the box that your organization can attest to providing proof of insurance. If your organization cannot attest to proof of insurance, you cannot apply for the grant.

Section 7. General Terms and Conditions

A. Click on the link. You will be brought to DOEE's grant announcement page.
B. Scroll to the bottom of the page and read the General Terms and Conditions by clicking the link that reads "Appendix 1 General terms and Conditions".
C. Once satisfied, check the box acknowledging that you have read the terms and conditions.

Section 8. Signed PCA

A. Click on the link. You will be brought to DOEE's grant announcement page.
B. Scroll to the bottom of the page and read the Promises, Certifications, Assertions and Assurance (PCAs) by clicking the link "Appendix 2 - Promises, Certifications, Assertions and Assurance." link
C. Once you are satisfied, sign the last page of the PCAs.
D. Upload the first and last page of the signed Promises, Certifications and Assertions and Assurances.

Section 9. Target Area

Select one or more Wards in which your project will be implemented. At the bottom of the list is a box to check if your organization will implement a District-wide project.

Section 10. Scoring Criteria

Review the scoring criteria before you begin your application and prepare your application.

Section 11. Narrative

Use the space provided to enter your program application narrative.

Section 12. Proposed Budget

A. Under Budget Category, double-click to select the type of expense from the drop-down menu.

B. Put the amount of funds your organization is requesting in the Requested Funds Column for each budget line.
C. Include any non-federal match.
D. The total will auto-populate.
E. Explain the calculation that determines each line in the Budget Detail Column.
F. You must select save and keep working to see your budget total.

To edit a budget line after you have saved the application:
A. Click on the edit button (the pencil icon)
B. A new page will appear.
C. Make your edits under the **Select Budget Category** heading.
D. Click save and close (this does not bring you to a new window).
E. Click the RFA number under the Submit a budget for this Application heading to keep working on your application. If you are still working on the budget, you will need to scroll to that section of the application.
F. In the Budget Narrative, explain why these costs are necessary, justifying the expenses.

Budget Narrative
Please write a budget narrative justifying the expenses outlined in the numeric budget. The narrative should explain all costs requested in the line item budget. Link all items in the line item budget to program goals in the budget narrative

G. If your organization will be requesting an advance, click the box acknowledging the advance request. Once you click the box, the Amount and Justification fields will appear.

If your organization will need an advanced payment for this project, please read the advanced payment policy and check the box below.

☑ My organization requires an advance for this project
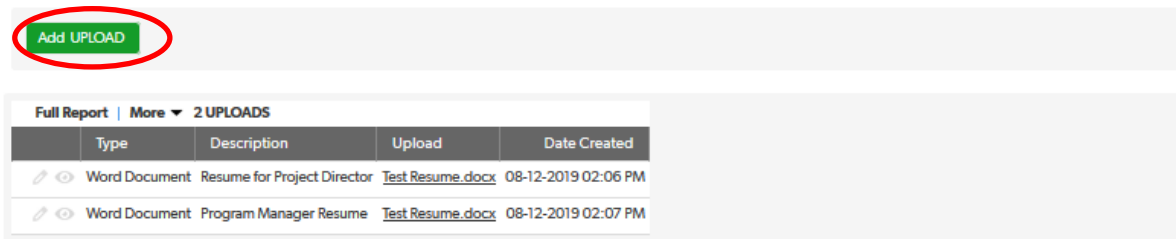Amount*

Justification for Advanced Payment*

Section 13. Uploads

Upload any other relevant documents such as staff résumés, letters of support, pictures and brochures
A. Clicking the Add UPLOAD button

Section 13. Uploads

Upload any additional relevant documents that support your application for funding, including images, resumes, letters of support, maps or other supplemental information.

Add UPLOAD

	Type	Description	Upload	Date Created
🖉 👁	Word Document	Resume for Project Director	Test Resume.docx	08-12-2019 02:06 PM
🖉 👁	Word Document	Program Manager Resume	Test Resume.docx	08-12-2019 02:07 PM

Full Report | More ▾ 2 UPLOADS

B. You will be brought to a new window

UPLOADS   Add UPLOAD

Submit Documents for this Application

RFA NUMBER RFA-FY19-WPD-764   RFA Full Name Community Stormwater Solutions Evaluation and Expansion Grant

Organization Name Pamela's Last Test Organization   DUNS NO.

Application Number APP-66-TNP2/RFA-FY19-WPD-764

Project Title Evaluation and Expansion Enterprise 3G

Upload additional supporting documents.

Type [⌄]   Description [ ]   Upload [Browse...] No file selected.

- CSV
- Excel
- Image
- JPG
- Maps
- Other
- PDF
- Pictures
- Word Document

C. Select the type of document you are uploading from the "Type" window and include a brief description of the document.

D. Once you have selected your document. Click the "Save & new" button to upload another document. Please note, if you click "Save & close" you will be brought to the top of the application. Scroll down to Section 13 - Uploads and click "Add UPLOADS" again.

Upload additional supporting documents.

Type [PDF ⌄]   Description [Annual Report]   Upload [Browse...] MyTest Nonprofit Annual Report.pdf

Save & new ▾   Cancel

- Save & close
- Save & new

E. Once you have completed all of the Uploads, click the "Save & close" button

To Replace or Delete a Document

- Click on the edit icon on the Uploads Report

	Type	Description	Upload	Date Created
🖊⊙	Word Document	Resume for Project Director	Test Resume.docx	08-12-2019 02:06 PM
🖊⊙	Word Document	Program Manager Resume	Test Resume.docx	08-12-2019 02:07 PM
🖊⊙	PDF	Annual Report	MyTest Nonprofit Annual Report.pdf	08-12-2019 02:34 PM

Full Report | More ▾ 3 UPLOADS

- You will be brought to a new window. From this window you can edit the type of document and the description.

UPLOADS   Edit UPLOAD #11

⌄ **Submit Documents for this Application**

RFA NUMBER	RFA-FY19-WPD-764	RFA Full Name	Community Stormwater Solutions Evaluation and Expansion Grant
Organization Name	Pamela's Last Test Organization	DUNS NO.	
Application Number	APP-66-TNP2/RFA-FY19-WPD-764		
Project Title	Evaluation and Expansion Enterprise 3G		

⌄ **Upload additional supporting documents.**

Type [Word Document ⌄]   Description [Resume for Project Director]   Upload Test Resume.docx 🔒 🕐
☐ Delete this file

Browse... No file selected.

[Save & close ▾] Cancel

- To replace the document, click the Browse button and Save & Close.
- To delete a file, click the "Delete this file" box and Save & Close.

Section 14. Print Application

This is optional if you are interested in keeping a hard copy of your application.

Section 15 Applicant Final Submission

A. If you are ready to submit your application, select "yes" from the drop-down menu in the section box.
B. Then Click the button FINAL SUBMIT.

Section 15. Applicant Final Submission

Are you ready for the final submission? If yes, please select the box.

[Yes   ▼]

Note: After you click this Final Submit button, you will no longer be able to edit the application

FINAL SUBMIT
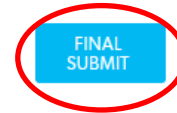
A pop box will appear if you successfully submitted your application.

DEPARTMENT OF ENERGY & ENVIRONMENT

Thank you for your application submission. The Department of Energy and Environment will inform you of any questions, if necessary.

Note: Please close the window. Thank you!

Grantees

Submitting a new Grant Application

From the Dashboard Page, click on the "Start Your New Application" button and follow the instructions in the "Responding to an RFA" section in the Applicant chapter of this user guide.

Reviewing and Accepting a Grant Award Notice (GAN)

Click the view or edit button from the Grantee Dashboard

Accepting a GAN

Once the GAN is released, you have 21 days to have your authorized representative submit a notice of disagreement. Please email the notice of disagreement to the GAN Program Manager.

Submitting Progress Reports

Step 1: From the Dashboard Page, select the GAN for which you will submit your report. This is done by clicking on the edit button under the heading My GAN(s).

Step 2: Click the button that reads "View Reporting Period". That takes you to the bottom of the page.

˅ Grant Award Information

VIEW REPORTING PERIOD

GRANTEE CANDIDATE - Record ID#   10

GAN NUMBER   GAN-FY19/MTN-57

Step 3: To submit a report, click the tab that reads "Submit Reports," then click the button that reads "Submit Report".

SUBMIT REPORTS   SUBMIT INVOICES

Grantee submit your reports

Submit Report

Step 4: You will be brought to a new screen. Enter the report period start and end date.
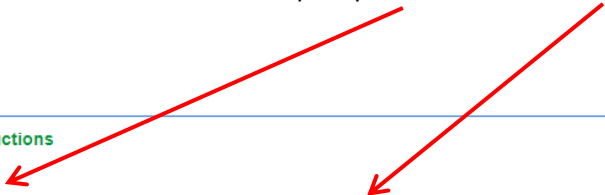
˅ Upload Report (Grantee Only)

Grantee Instructions

Report Date

Reporting Period Start Date   mm-dd-yyyy   Reporting Period End Date   mm-dd-yyyy   Upload Report   Choose File   No file chosen

Step 5: Choose a file to upload. For more information on what to include, see Attachment 3 of your award notification.

Step 6: Click the Save & close button.

Step 7: Verify that your report was correctly uploaded. Once the report is uploaded, you will be brought back to the Grant Award Information page. You can click view reporting period to be brought to the bottom of the page to double-check your report.

Step 8: Deleting a file, if necessary.

If you made a mistake on the report or need to update the report for any reason, click the edit icon ✎ on the report that you would like to change. Click Delete this file.
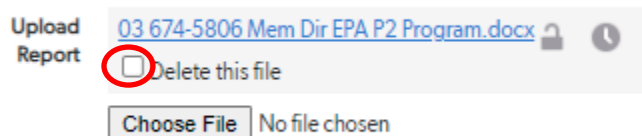
Once you delete the file, you will be brought back to the Grant Award Information page. You will need to click the same edit button as above. Repeat steps 6 – 8 above. **Please note, the maximum number of revisions you can submit is 3.**

Submitting Invoices

Step 1: To submit an invoice from the Dashboard Page, select the corresponding GAN for which you will be reporting. This is done by clicking on the edit button ✎ under the heading My GAN(s).

Step 2: Click the button that reads "View Reporting Period." That takes you to the bottom of the page.

Step 3: Click on the tab that reads "Submit Invoices," then click the button that reads "Submit Invoice."

Grantee Submit Reports

> **Reporting Section Instructions**

SUBMIT REPORTS (SUBMIT INVOICES) APPROVE AMOUNTS APPROVE AMENDMENT AMOUNT

(Submit Invoice)

Full Report | More ▾ 2 INVOICES

Step 4: You will be brought to a new screen. On this screen, enter the amount you are requesting to be reimbursed.

∨ Invoice Information (Grantee Only)

INVOICE ID# IN-GAN-FY/MTN-140 **Invoice Date**

Enter below the requested amount

Requested Invoice Amount [   ]

Upload invoice and all supporting documentation

Upload Invoice and Supporting Documentation [Browse...] No file selected.

Step 5: Upload your invoice and all supporting documentation. Be sure that the amount on the invoice and the amount you are requesting match.

For more information on supporting documentation, see your grant terms and conditions.

Step 6: Click Save & close. Once the invoice and supporting documentation is uploaded, you will return to the Grant Award Information page. You can click view reporting period and be brought to the bottom of the page, where you can verify that your invoice was correctly uploaded.

Step 7: Deleting a file, if necessary.

If you made a mistake on the invoice or need to update it for any reason, click the edit icon 🖉 on the report that you would like to change.

Click the delete this file button. Once you delete the file, you will be brought back to the Grant Award Information page. You will need to click the same edit button as above. Repeat steps 3 – 5 above. **Please note, the maximum number of revisions you can submit is 3.**

DOEE Grants Management System