



## Electronic Grant Management System (EGMS) External User Guide

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Oregon Department of Education  
Office of Finance and Information Technology  
255 Capitol Street NE  
Salem, OR 97310



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### EGMS Support

[ode.egms@ode.oregon.gov](mailto:ode.egms@ode.oregon.gov)

971-208-0133

<https://odedistrict.oregon.gov/Applications/Pages/egms.aspx>

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## Introduction

Welcome to the Oregon Department of Education's Electronic Grant Management System, also known as EGMS ("ee-gums"). This system will enable you to access an online interface to view your subgrants and award notifications, and to enter claims.

## Obtaining Access to EGMS

### ***Only: School Districts, Charter Schools Affiliated with School Districts, and ESDs***

If you are with a school district, charter school affiliated with a school district, or Educational Service District (ESD), *you will first need to contact your District Security Administrator (DSA) to obtain a username and password to login. Your DSA will also need to add EGMS Read/Insert/Update permissions to your account in Web Security.* Once that is done, then follow the instructions below.

### ***All Users: Complete the Form***

To use EGMS, your organization must grant you permissions using the EGMS Access Request Form. For each person listed on the form, please indicate what type of permissions they will need, or if they are having permissions removed. ***Each organization will need at least one person designated as a Claim Administrator to be able to request reimbursements.*** Claim Administrators are the only people who can enter claims (requests for reimbursement) in the system.

Any time your authorized EGMS users change, please submit a revised EGMS Access Request Form specifically deleting (removing permissions from) the staff member(s) to be removed. Unused accounts will eventually be end-dated in the ODE system if no action is taken. *Do not share your login information. If another user needs EGMS access, please complete the EGMS Access Request Form for them to get their own login.*

The form may also be used to add, change, or replace contacts listed on a subgrant. These may or may not be the same people as your Claim Administrators. Each subgrant usually lists an agency head and a fiscal contact. These are the people who get email notifications about changes to the subgrant(s). ODE staff do not have any way of knowing who the correct fiscal contact is for a grantee organization and cannot guarantee that subgrants will list the correct person at your agency if multiple people with fiscal titles are in the list of available contacts.

### ***Get the Form Signed***

Because this form authorizes people to make claims on grants on behalf of their organization, legally attesting to the validity and appropriateness of those claims, the form needs to be signed by the agency head/director/superintendent (at least a one-level-up signature authority from the person receiving the user permissions).

*If two people are listed as needing Claim Administrator permissions, they may not sign for each other. A person also may not sign for themselves. If the agency head/director/superintendent is*

*requesting Claim Administrator access, the form needs to be signed by a (different) member of the entity's Board of Directors.*

### **Return the Completed Form**

Once the form is completed and signed, please send it back to [ode.egms@ode.oregon.gov](mailto:ode.egms@ode.oregon.gov).

### **Look for Notification**

EGMS staff will add the necessary permissions to the system and notify you when your permissions are ready. This usually involves a system-generated password email and a personalized welcome email. If you don't hear from EGMS staff in a timely manner, or if you are unsure of your username, please follow up by emailing [ode.egms@ode.oregon.gov](mailto:ode.egms@ode.oregon.gov).

### **Resetting Password**

If your password expires or you need to reset it, please go here:

<https://district.ode.state.or.us/apps/login/AccountReset.aspx>

## **Getting Into the Online EGMS System**

### **Login**

Once permissions have been granted for you to access EGMS and you have a user name and a password, go here to login:

<https://district.ode.state.or.us/CentralLogin>

The screenshot displays the 'Central Login' interface for the ODE System. At the top, there's a navigation bar with 'Quick Links', 'Training', and 'Help' tabs. Below this, the 'Central Login' title is prominently displayed. A section titled 'ODE SYSTEM USE NOTIFICATION' contains a paragraph about agreeing to state and federal privacy laws, followed by a numbered list of four terms and conditions. The login form itself includes two input fields: 'Username' and 'Password'. Below these fields is a checkbox labeled 'Remember this device'. A 'Login' button is positioned at the bottom center of the form area. The page also features a 'Log In' link and a 'Help' link in the top right corner.

Enter your username and password in the boxes—these are case sensitive. You will select your own new password once you have logged in.

## Applications

You have been granted access to the items displayed in this list. To access an application, select it from the list.


CIP Budget Narrative - ODE Grants Management System

EGrant Management System (EGMS) - ODE Grants Management System

Secure File Transfers

From the list of Applications, select EGrant Management System (EGMS)—if that is not available, contact your District Security Administrator (if you are with a school district, charter school affiliated with a school district, or ESD), or [ode.egms@ode.oregon.gov](mailto:ode.egms@ode.oregon.gov) (for all other users) to get your permissions fixed.

[Home](#) > **Online EGMS**

 <b>EGMS</b>	<b>EGrant Management System (EGMS)</b>	
	<b>Main Function</b>	<b>Task and Reports</b>
Help? <a href="mailto:ode.egms@ode.oregon.gov">ode.egms@ode.oregon.gov</a> Fiscal Grants Team EGMS Staff  971-208-0133 <a href="#">Download User's Guide</a>	Web - Claims Web - Reports Web - Sub Grant	

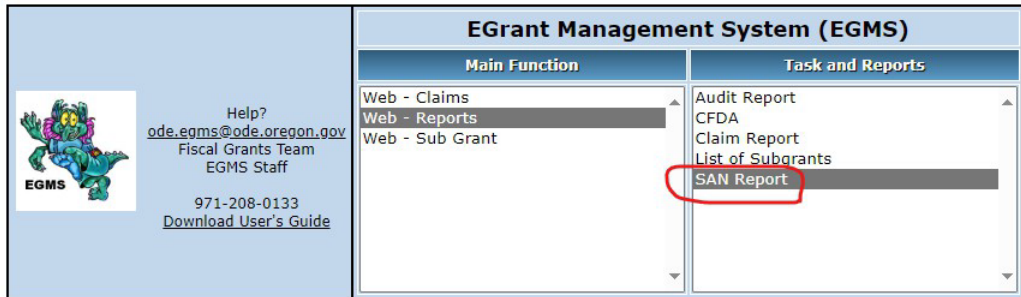
Once you are in the system, this is what the home page looks like. To get back to the home page from any screen, click on the EGMS monster.



# Reading Subgrant Award Notifications

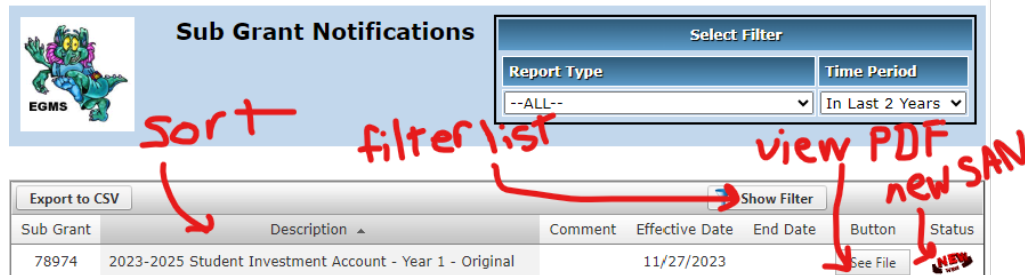
## Required Reading

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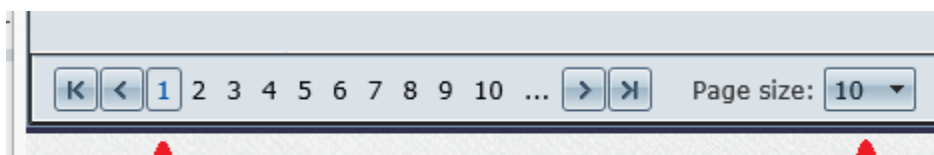


Your organization must open/read any unopened Subgrant Award Notification Report(s) (SANs) for a subgrant before you will be able to make a claim (otherwise the Edit button will be grayed out). To get to the SAN Reports from the home page, go to Web - Reports/SAN Report. (The “SAN Report” option on the right side will not be visible until you’ve selected Web - Reports on the left side.)

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If the subgrant you are seeking is not visible on this screen (usually due to a long grant history), you can choose to use the Show Filter button, which will allow you to enter the subgrant number that you’re seeking. You can click on any of the headers to sort the results in ascending or descending order. Sorting by the Sub Grant header may be the most useful—if you click that header twice, it will sort by subgrant number in descending order (with the most recent ones first).



Use the page numbers at the bottom of the page to show additional pages of grants and/or use the pulldown to change how many grants are listed on each page.

You may also need to use the pagination at the bottom and move to a different page until you find the one you're seeking.



Look for the subgrant number upon which you wish to make a claim. If any of the SAN Reports for that grant number have a spinning red ring in the right-hand Status column, that means they are unopened and need to be read. Click on See File to open each unread PDF for that grant number and *save a copy for your internal records*. The SAN Report contains the details that describe your subgrant funding.

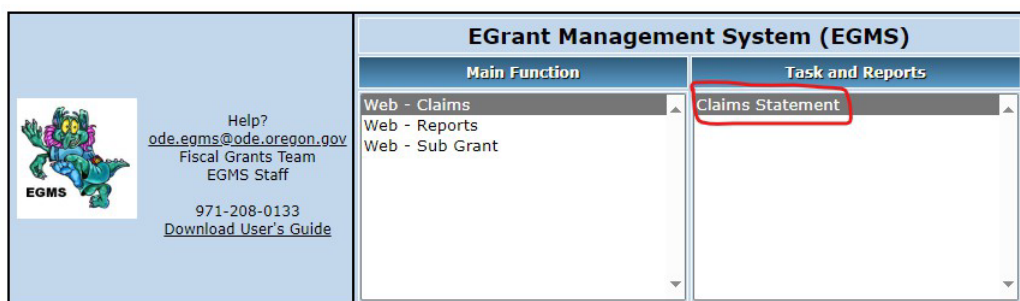
Federal formula pass-through grants will have grant agreement language embedded in the SAN Report, and in those cases, the SAN will be your only grant agreement. All other grants should have a separate, full grant agreement generated by ODE's Procurement Unit and executed by the grantee and ODE.

Once you have opened the SAN Report, the spinning red ring will go away and when you go to make a claim, the Edit button should be available for use.

## Making Claims

### Getting to the Claims Screen

[Home](#) > [Online EGMS](#)



Click on the EGMS monster to get to the home page.

From the home page, click on Web - Claims/Claims Statement. (The "Claims Statement" option on the right side will not be visible until you've selected Web - Claims on the left side.)

Home > EGrant Management System > Sub Grant Detail > Sub Grant Claims



### Sub Grant Claims Statement

1st →

filter →

make claim →

sort →

navigate pages →

Select an Office

Office of Education, Innovation & Improvement ▼

Export to CSV

Show Filter

Edit	Detail	Sub Grant #	Sub Grant Title	End Date	Award Amount	% Approved	Claims Amt	Balance	Final Claim Date
<a href="#">Edit</a>	<a href="#">Detail</a>	78974	2023-2025 Student Investment Account - Year 1	9/30/2024	\$39,694.76	100	\$19,847.38	\$19,847.38	6/30/2024
Totals:					\$39,694.76		\$19,847.38	\$19,847.38	

Page size: 10

1 items in 1 pages

[SAN Reports](#)

You'll need to select an office from the pulldown box in the top right corner. (You might have subgrants associated with different Oregon Department of Education offices, so be sure to try a different office if you can't see your subgrant).

### Finding Your Subgrant

You can click on any of the headers to sort the results in ascending or descending order, use the Show Filter button on the right to limit results, or use the pagination at the bottom of the page to find additional grants.

*Please note, your anticipated grant(s) may not have been built yet in EGMS. Please contact your Grant Manager for more details if you do not find the grant(s) you are expecting to find in EGMS.*

### Entering a Claim

To make a claim, you'll need to click on the Edit button.

*If the Edit button is grayed out, hover your mouse over the button for a few seconds to see the error message.* Error messages might include:

- **"Read SAN Report"**—follow the instructions above to get to your SAN Reports.
- **"Inst mgr mismatch"**—the entity you logged in as is not the fiscal agent for these grants (you'll need to work with your fiscal agent to get those funds claimed on your behalf).
- **"Past final claim date"**—the final claim deadline for this grant has passed. In some cases, it may be possible to get this date extended. Please talk to your Grant Manager.
- **"Final claim flag set"**—your last claim was marked as final. As a result, you'll need to talk to your Grant Manager about getting the final flag removed from the grant to enable you to make an additional claim on any remaining funds.
- **"Subgrant on hold"**—this grant has been placed on hold by ODE. Please talk to your Grant Manager to find out why. Holds are often because of pending grant agreements.
- **"Please contact Grant Manager"**—your grant has more than one issue and you should talk to your Grant Manager for more information.

Once the Edit button is available and error messages have been resolved, click on the Edit button for the subgrant for which you want to submit a claim.

There will be three items to enter.

*usually leave blank*      *last day of claim*      *amount*

Edit	Detail	Sub Grant #	Sub Grant Title	End Date	Award Amount	% Approved	Claims Amt	Balance	Enter Y if final claim	Period Covered (mm/dd/yyyy)	Claim Amount	Final Claim Date
Submit Cancel		78974	2023-2025 Student Investment Account - Year 1	9/30/2024	\$39,694.76	100	\$19,847.38	\$19,847.38				6/30/2024
Totals:					\$39,694.76		\$19,847.38	\$19,847.38				

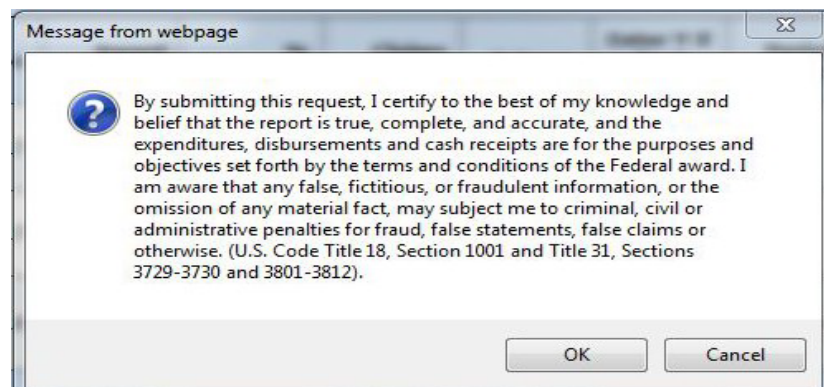
Page size: 10      1 Items in 1 pages

In the “Enter Y if final claim” box, **LEAVE THIS BLANK UNLESS...you are absolutely certain that this is the last claim you will ever need to make on this subgrant and don’t expect new funding to be added to the subgrant. If you enter a Y, this has the potential to liquidate (remove) the remainder of your funding!!**

In the Period Covered box, this should be the date through which the expenditures were incurred. This must be a date prior to the date of entry and it cannot be a future date. The date must be entered as MM/DD/YYYY.

In the Claim Amount box, enter the dollar amount with a decimal point. **Do not add the dollar sign or commas. Do not enter negative amounts.**

When you click Submit, the following message will pop up:



You must click OK for the claim to be completed. By clicking OK, your (the current user’s) login will be attached to that claim. **Do not share your login information. If another user needs EGMS access, please complete the EGMS Access Request Form for them to get their own login.**



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To view your transaction and other details about your subgrants, click on the monster to go to the home page. On the main menu, click on Web – Sub Grant/Sub Grant List. (The “Sub Grant List” option on the right side will not be visible until you’ve selected Web – Sub Grant on the left side.)

Use the headers to sort the subgrants and click on Select for the grant you'd like to see. Your Grant Manager's contact information and other important grant details can be found here.

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