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DEPARTMENT OF
EDUCATION

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Electronic Grant Management System (EGMS) External User Guide

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



EGMS Support
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.

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.

Resetting Password

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

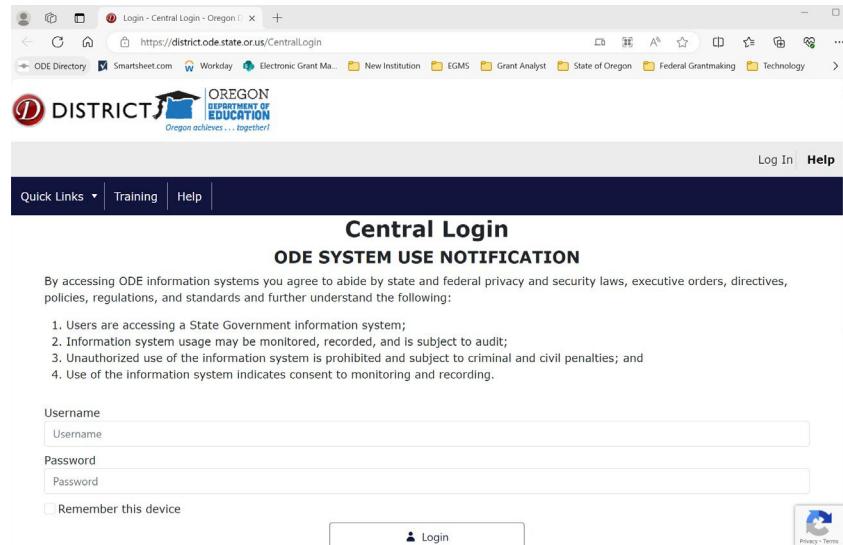
<https://district.ode.state.or.us/apps/login/AccountReset.aspx>

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 shows a web browser window with the URL <https://district.ode.state.or.us/CentralLogin>. The page is titled "Central Login" and "ODE SYSTEM USE NOTIFICATION". It contains a user agreement and a list of 4 rules. Below the rules are input fields for "Username" and "Password", a "Remember this device" checkbox, and a "Login" button. The page is part of the Oregon Department of Education's website, featuring the ODE logo and navigation links for various state programs.

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 (for all other users) to get your permissions fixed.

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

EGrant Management System (EGMS)	
Main Function	Task and Reports
Web - Claims Web - Reports Web - Sub Grant	

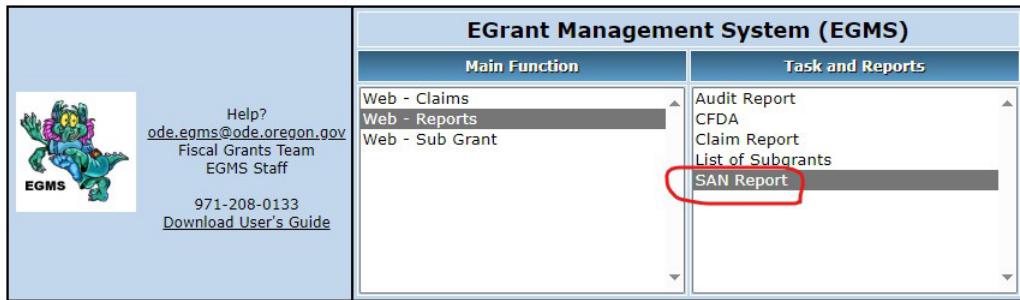
Once you are in the system, this is what the home page looks like. To get back to the home page from any screen, click on the EGMS monster.



Reading Subgrant Award Notifications

Required Reading

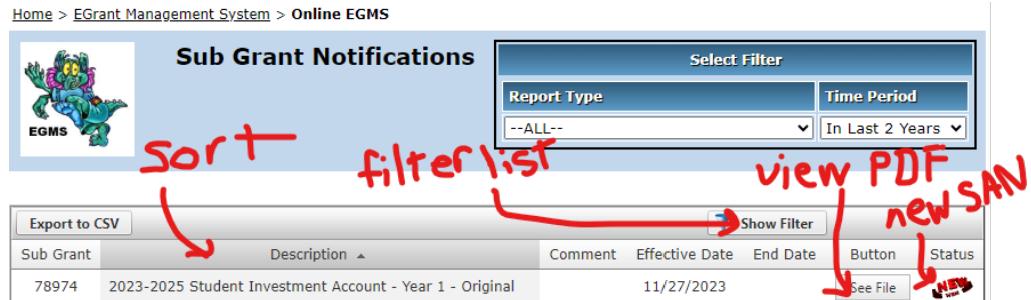
[Home](#) > [Online EGMS](#)



The screenshot shows the EGMS home page. On the left, there is a logo of a green dragon-like creature with the text 'EGMS'. On the right, there is a navigation menu. The 'Main Function' section has 'Web - Claims', 'Web - Reports' (which is highlighted in blue), and 'Web - Sub Grant'. The 'Task and Reports' section has 'Audit Report', 'CFDA', 'Claim Report', 'List of Subgrants', and 'SAN Report' (which is highlighted with a red box).

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.)

[Home](#) > [EGrant Management System](#) > [Online EGMS](#)



The screenshot shows the 'Sub Grant Notifications' page. At the top, there is a 'Select Filter' box with 'Report Type' set to '--ALL--' and 'Time Period' set to 'In Last 2 Years'. Below the filter is a table with columns: Sub Grant, Description, Comment, Effective Date, End Date, Button, and Status. A red arrow points to the 'Show Filter' button with the text 'filter list'. Another red arrow points to the 'Status' column with the text 'view PDF new SAN'.

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).

The screenshot shows the page footer. It includes navigation buttons for page numbers (1, 2, 3, 4, 5, 6, 7, 8, 9, 10, ...), a 'Page size' dropdown set to 10, and a 'See File' button. Two red arrows point to the page numbers and the page size dropdown with the text '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.

Status



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](#)

The screenshot shows the EGMS home page. On the left, there is a large green and blue cartoon monster icon with the text "EGMS" below it. To the right of the icon, there is contact information: "Help?", "ode,egms@ode.oregon.gov", "Fiscal Grants Team", "EGMS Staff", "971-208-0133", and a link to "Download User's Guide". On the right, the page is titled "EGrant Management System (EGMS)". It features a sidebar with "Main Function" and "Task and Reports" sections. The "Main Function" section lists "Web - Claims", "Web - Reports", and "Web - Sub Grant". The "Task and Reports" section lists "Claims Statement". The "Claims Statement" option is highlighted with a red box.

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

Select an Office (1st)

filter

make claim

sort

navigate pages

Show Filter

Sub Grant #	Sub Grant Title	End Date	Award Amount	% Approved	Claims Amt	Balance	Final Claim Date
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 SAN Reports 1 items in 1 pages

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

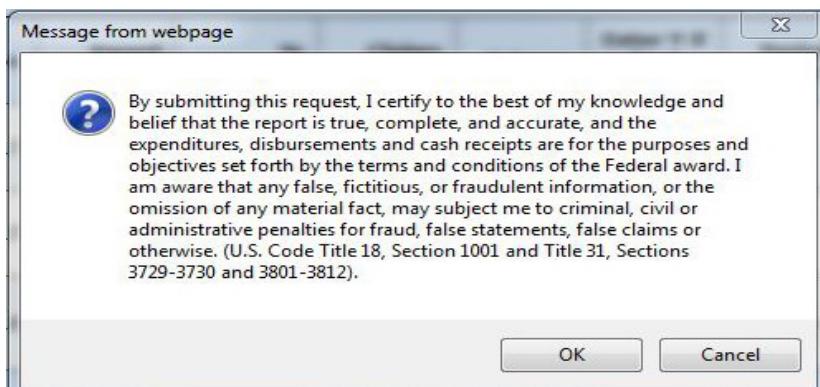
Export to CSV												Show Filter
Edit	Detail	Sub Grant #	Sub Grant Title	End Date	Award Amount	% Approved	Claims Amt	Balance	Enter Y if final claim	Period Covered (mm/dd/yyyy)	Claim Amount	Final Claim Date
<input type="button" value="Submit"/>		78974	2023-2025 Student Investment Account - Year 1	9/30/2024	\$39,694.76	100	\$19,847.38	\$19,847.38	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	6/30/2024
Totals:					\$39,694.76		\$19,847.38	\$19,847.38				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.*

Viewing Subgrant Detail

Home > Online EGMS



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.



Go to the bottom of the Sub Grant Detail Screen and click on Financial Detail to view financial transaction details.

Need Help?

If you make a mistake in the claim entry process and need help correcting it, contact your Grant Manager. *They cannot delete entered claims but they can reject them for you to re-enter.*

If you need help with using EGMS, contact ode.egms@ode.oregon.gov.