



Minnesota Department of **Human Services**

Live Well at Home Grantee Training on the Enterprise Grants Management System (EGMS)

August 2016

How do I get paid?

When may I request funds?

Grantees submit quarterly expenditure reports during their funding period. (Reminder: program reports must be submitted prior to payment.)

(State Fiscal Calendar)	Due Date
Quarter 1 : July 1 – Sept. 30	October 15
Quarter 2: Oct 1 – Dec 31	January 15
Quarter 3: Jan 1 – March 31	April 15
Quarter 4: April 1 – June 30	July 15

Entering expenditures into the Enterprise Grants Management System (**EGMS**)

The web site for **EGMS** is
<http://egms.dhs.state.mn.us>

Sign up for your new account

<p>User Login</p> <p>Forgot My Password</p> <p>New User?</p>	<div data-bbox="716 425 1702 508">Please Log In</div> <p data-bbox="768 536 1025 575">User Name: <input data-bbox="1035 519 1547 591" type="text"/></p> <p data-bbox="794 622 1025 661">Password: <input data-bbox="1035 605 1522 676" type="password"/></p> <p data-bbox="726 701 1325 743"><input type="checkbox"/> Remember me next time.</p> <div data-bbox="1367 761 1702 839"><input type="button" value="Log In"/></div>
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Required information

Click on the “New User” link in the left navigation bar and fill in the required information

User Login	New User Registration	
Forgot My Password	Fields with * are required.	
New User?	*Vendor Number:	<input type="text" value="0000123456"/>
	*Grantee Name:	<input type="text" value="Three Bears"/>
	*Contact Name:	<input type="text" value="Goldi Locks"/>
	*Address1:	<input type="text" value="8 Porridge Lane"/>
	Address2:	<input type="text"/>
	*City:	<input type="text" value="Saint Paul"/>
	*State:	<input type="text" value="MN"/>
	*Zip:	<input type="text" value="55101"/>
	*Phone:	<input type="text" value="651-555-5555"/> xxx-xx-xxxx
	Fax:	<input type="text"/>
		<input type="button" value="Next"/>

Sign up for your new account

[User Login](#)

[Forgot My Password](#)

[New User?](#)

Sign Up for Your New Account

User Name: Goldi

Password: ●●●●●●●●

Confirm Password: ●●●●●●●●

E-mail: g.locks@threebears.com

Security Question: Favorite anything

Security Answer: Just right

Create User

Report expenditures

Select your grant

Be sure you select the correct Grant! Click on “Report Expenditures” under *My Grants* view.



Minnesota Department of **Human Services**

EGMS
Enterprise Grants Management System

Hello, Leni Wilcox. Welcome to EGMS.

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My Grants

		Number	Vendor Number	Title	Begin Date	End Date	Amount	Budget Setup Date
View	Report Expenditure	442011	07975000825	Three Bears	9/7/2009	9/6/2010	\$25,465.00	9/29/2009

Select budget period

Click on select. This will bring you to the next page listing the budget periods associated with your grant.

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	Number	Vendor Number	Title	Begin Date	End Date	Amount
View	442011	07975000825	Three Bears	9/7/2009	9/6/2010	\$25,465.00

Select a Budget Period

	GC Number	Start Date	End Date	Total Budget Amount
Select	442011	9/7/2009	9/6/2010	\$25,465.00

Select the reporting period

Click on the reporting period which corresponds to the period you wish to report.



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	Number	Vendor Number	Title	Begin Date	End Date	Amount
View	442011	07975000825	DHS10/WILDER FOUNDATION/J PEICHEL	9/7/2009	9/6/2010	\$25,465.00

Select a Budget Period

	GC Number	Start Date	End Date	Total Budget Amount
Select	442011	9/7/2009	9/6/2010	\$25,465.00

Select a Reporting Period

	Start Date	End Date	Report Due Date	Cash Advance	Expenditures
Report Expenditure ←	9/7/2009	9/30/2009	10/10/2009	\$0.00	No expenditures reported for this reporting period.
Report Expenditure	10/1/2009	12/31/2009	1/10/2010	\$0.00	No expenditures reported for this reporting period.
Report Expenditure	1/1/2010	3/31/2010	4/10/2010	\$0.00	No expenditures reported for this reporting period.

Enter expenditures

Enter your expenditures in the appropriate line items. Be sure you are entering the correct expenditures for **State** share and **Local** share.

81 Community Services - State Share		Expenditure Type	Budget Amount	Total Expenditures BPTD	Available	Reporting Period: 4/1/2009 - 6/30/2009	Shared Budget	Variance (%)	RI%
100	Communication & utilities	\$300.00	\$93.00	\$207.00	<input type="text"/>	False	10	100	
	Supplies	\$1,100.00	\$960.00	\$140.00	<input type="text"/>	False	10	100	
200	Contracts	\$68,000.00	\$49,270.00	\$18,730.00	<input type="text"/>	False	10	100	
	Other	\$6,300.00	\$4,990.00	\$1,310.00	<input type="text"/>	False	10	100	
Total:		\$75,700.00	\$55,313.00	\$20,387.00					
Community Services - Local Share		Expenditure Type	Budget Amount	Total Expenditures BPTD	Available	Reporting Period: 4/1/2009 - 6/30/2009	Shared Budget	Variance (%)	RI%
100	Personnel	\$60,488.00	\$58,525.00	\$1,963.00	<input type="text"/>	False	100	0	
	Travel	\$5,040.00	\$8,270.00	(\$3,230.00)	<input type="text"/>	False	100	0	
100	Communication & utilities	\$2,324.00	\$1,842.00	\$482.00	<input type="text"/>	False	100	0	
	building space	\$4,800.00	\$3,600.00	\$1,200.00	<input type="text"/>	False	100	0	
100	Supplies	\$600.00	\$428.00	\$172.00	<input type="text"/>	False	100	0	
	Contracts	\$12,100.00	\$13,925.00	(\$1,825.00)	<input type="text"/>	False	100	0	

Local share – also known as Match

- Required match for Live Well at Home grants is dollar for dollar.
- Match is the non-state share of costs that the grantee, or grantee's partners, are required to contribute to accomplish the purposes of the grant.
- Match can either be an actual expenditure (cash) or a virtual cost (in-kind contribution).
- In-kind match is typically in the form of the value of personnel, goods and services.
- Matching may not be used to match another federal or state grant; it may only be used as match one time.

Submit report

	Contracts	\$68,000.00	\$49,270.00	\$18,730.00	18730	False	10	100
	Other	\$6,300.00	\$4,990.00	\$1,310.00	1310	False	10	100
	Total:	\$75,700.00	\$55,313.00	\$20,387.00	\$20,387.00			

Community Services - Local Share	Expenditure Type	Budget Amount	Total Expenditures BPTD	Available	Reporting Period: 4/1/2009 - 6/30/2009	Shared Budget	Variance (%)	RI%
	Personnel	\$60,488.00	\$58,525.00	\$1,963.00	32978	False	100	0
	Travel	\$5,040.00	\$8,270.00	(\$3,230.00)	3033	False	100	0
	Communication & utilities	\$2,324.00	\$1,842.00	\$482.00	605	False	100	0
	building space	\$4,800.00	\$3,600.00	\$1,200.00	1200	False	100	0
	Supplies	\$600.00	\$428.00	\$172.00	200	False	100	0
	Contracts	\$12,100.00	\$13,925.00	(\$1,825.00)	5625	False	100	0
	Other	\$2,000.00	\$830.00	\$1,170.00		False	100	0
	Total:	\$87,352.00	\$87,420.00	(\$68.00)	\$43,641.00			

Total expenditures for this Reporting Period: \$64,028.00

Submit Report

Cancel

Check Total

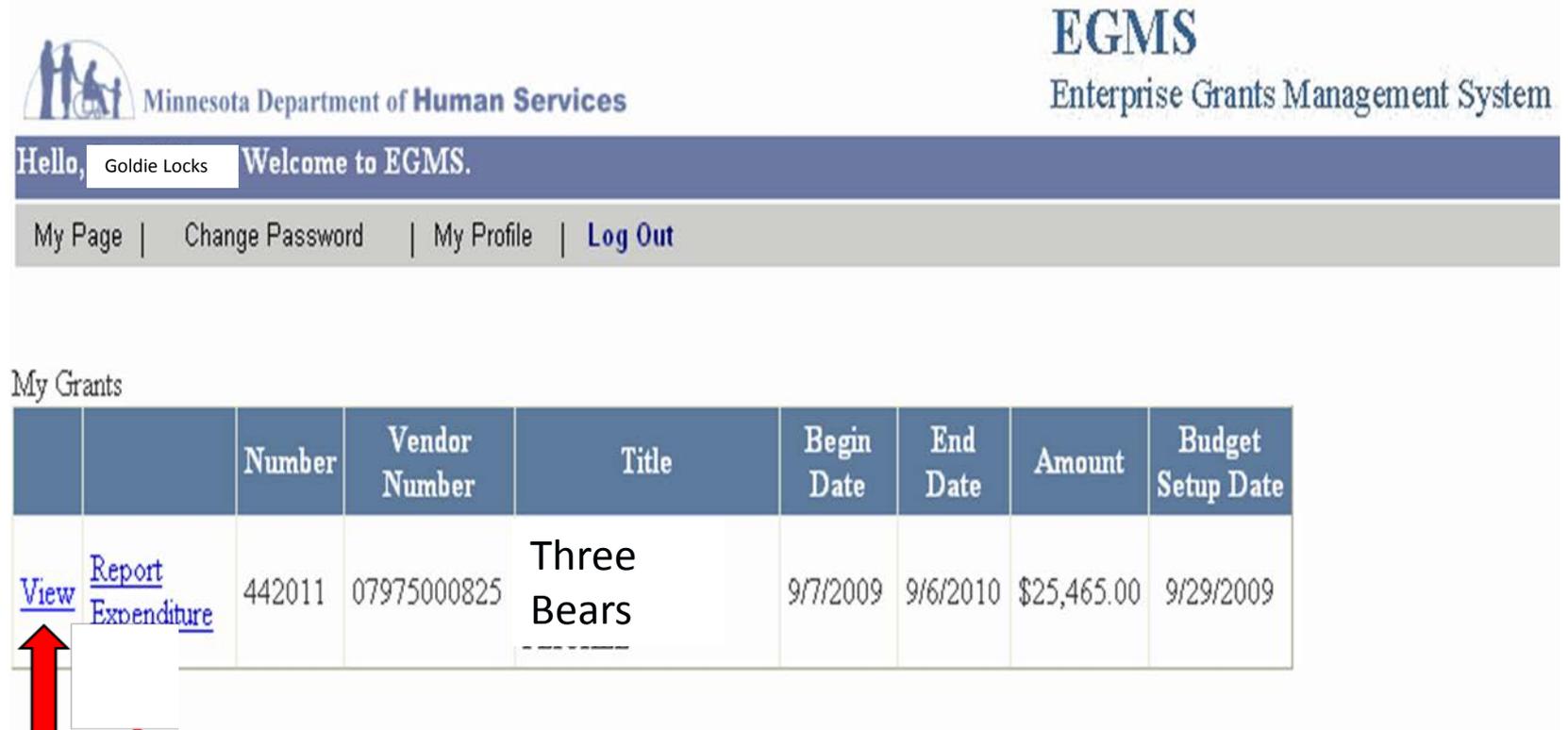


What happens next?

- Clicking on **submit report** will send the report to DHS for approval

Budget revisions

- Go back to your grant page and click on VIEW



Minnesota Department of **Human Services**

EGMS
Enterprise Grants Management System

Hello, Goldie Locks Welcome to EGMS.

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My Grants

		Number	Vendor Number	Title	Begin Date	End Date	Amount	Budget Setup Date
View	Report Expenditure	442011	07975000825	Three Bears	9/7/2009	9/6/2010	\$25,465.00	9/29/2009

View budget



Minnesota Department of **Human Services**

EGMS

Enterprise Grants Management System

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Grant Contract Detail

[Back To MyPage](#)

Budget Periods

			ID	GC Number	Start Date	End Date	Budget Amount
View Budget	View Expenditure Report	View Payment	729	442011	9/7/2009	9/6/2010	\$25,465.00



Grantee:	DHS10/...		
Contract Number:	442011	Vendor Number:	00000000
Contract Start Date:	9/7/2009	Contract Amount:	\$25,465.00
Contract End Date:	9/6/2010		
Grant Manager:	Bev Asher		
Grant Accountant:	Tami Strand		

Notes:

Select edit

Budgets, Reported Expenditures and Payments Page - Microsoft Internet Explorer provided by DHS, State of MN

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address http://egms.dhsintra.net/BudgetsAndExpenditureReports.aspx

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Minnesota Department of Human Services minnesota north star

Hello, David Hanson . Welcome to Deaf and Hard of Hearing. [Change ProgramUnit](#)

My Page | GrantContract Lookup | My Templates | Expenditure Report

Number	Vendor Number	Title	Begin Date	End Date	Amount	User Defined	Require SA	SA
442011	07975000825	DHS10/WILDER FOUNDATION/J PEICHEL	9/7/2009	9/6/2010	\$25,465.00		True	PWJAK58

[View Grantee Expenditures](#) [View Payments](#)

Budgets For Budget Period: 9/7/2009 - 9/6/2010

	Budget Type	Budget Status	Submitted Date	Submitted By	Grantee Approval	GM Approval	GA Approval	Secondary Approval
Edit	Current Budget	Approved	9/29/2009	David Hanson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Purpose	Budgets			
	Type	Current	Pending	Previous
Community Service - State Share	Personnel	\$20,300.00		
	Travel	\$165.00		
	Communication and Utilities	\$0.00		
	Building Space	\$0.00		
	Construction	\$0.00		
	Equipment	\$0.00		
	Supplies	\$0.00		
	Volunteers	\$0.00		
	Contracts	\$3,900.00		
	Other	\$1,100.00		
	Total:	\$25,465.00	\$0.00	\$0.00
Community Service - Local Share				
	Personnel	\$14,975.00		

Discussions Discussions not available on http://egms.dhsintra.net/

javascript: __doPostBack('ctl00\$btnChangeProgramUnit','')

Local intranet

Scroll down to the bottom and click on Revise Budget

Budgets, Reported Expenditures and Payments Page - Microsoft Internet Explorer provided by DHS, State of MN

Address: http://egms.dhsintra.net/BudgetsAndExpenditureReports.aspx

Equipment	\$0.00	\$0.00	10	100	False
Supplies	\$0.00	\$0.00	10	100	False
Volunteers	\$0.00	\$0.00	10	100	False
Contracts	\$3,900.00	\$0.00	10	100	False
Other	\$1,100.00	\$450.00	10	100	False
Total:	\$25,465.00	\$6,540.42			

Type	Budget Amount	Total Expenditures	Variance %	RI%	Shared Budget?
Personnel	\$14,875.00	\$4,909.77	100	0	False
Travel	\$785.00	\$49.50	100	0	False
Communication and Utilities	\$900.00	\$224.85	100	0	False
Building Space	\$3,100.00	\$1,250.00	100	0	False
Construction	\$0.00	\$0.00	100	0	False
Equipment	\$0.00	\$0.00	100	0	False
Supplies	\$714.00	\$378.00	100	0	False
Volunteers	\$0.00	\$0.00	100	0	False
Contracts	\$4,140.00	\$0.00	100	0	False
Other	\$2,500.00	\$0.00	100	0	False
Total:	\$27,014.00	\$6,812.12			

BudgetType: Submitted Date:

Budget Status: Submitted By:

Grantee Approval Grant Manager Approval Grant Accountant Approval Secondary Approval

Notes: [Insert Note](#)

Discussions not available on http://egms.dhsintra.net/

Local intranet

Enter revised budget

(only line items that are being revised need to be entered)

Budgets, Reported Expenditures and Payments Page - Microsoft Internet Explorer provided by DHS, State of MN

Address: http://egms.dhsintra.net/BudgetsAndExpenditureReports.aspx

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Minnesota Department of Human Services

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Number	Vendor Number	Title	Begin Date	End Date	Amount	User Defined	Require SA	SA
442011	07975000825	DHS10/WILDER FOUNDATION/J PEICHEL	9/7/2009	9/6/2010	\$25,465.00		True	PWJAK58

[Back To Budgets](#)

Purpose	Type	Budget Amount	Revised Budget Amount	Total Expenditures	Variance %	RI%	Shared Budget?
Community Service - State Share	Personnel	\$20,300.00	20300	\$6,090.42	0	100	False
	Travel	\$165.00	165	\$0.00	10	100	False
	Communication and Utilities	\$0.00	0	\$0.00	10	100	False
	Building Space	\$0.00	0	\$0.00	10	100	False
	Construction	\$0.00	0	\$0.00	10	100	False
	Equipment	\$0.00	0	\$0.00	10	100	False
	Supplies	\$0.00	0	\$0.00	10	100	False
	Volunteers	\$0.00	0	\$0.00	10	100	False
	Contracts	\$3,900.00	3900	\$0.00	10	100	False
	Other	\$1,100.00	1100	\$450.00	10	100	False
	Total:		\$25,465.00		\$6,540.42		
Community Service - Local Share	Type	Budget Amount	Revised Budget Amount	Total Expenditures	Variance %	RI%	Shared Budget?

Discussions not available on http://egms.dhsintra.net/

Done Local Intranet

Justify and submit your budget revisions

Submit the budget revision

Scroll down to the bottom of the page and press SAVE. This completes the budget revision request.

The screenshot shows a web browser window displaying a budget management interface. The page title is "Budgets, Reported Expenditures and Payments Page - Microsoft Internet Explorer provided by DHS, State of MN". The browser address bar shows the URL "http://pages.dhs.state.mn.us/budgets/expenseReports.asp".

The main content area contains two tables. The first table shows a summary of budget items:

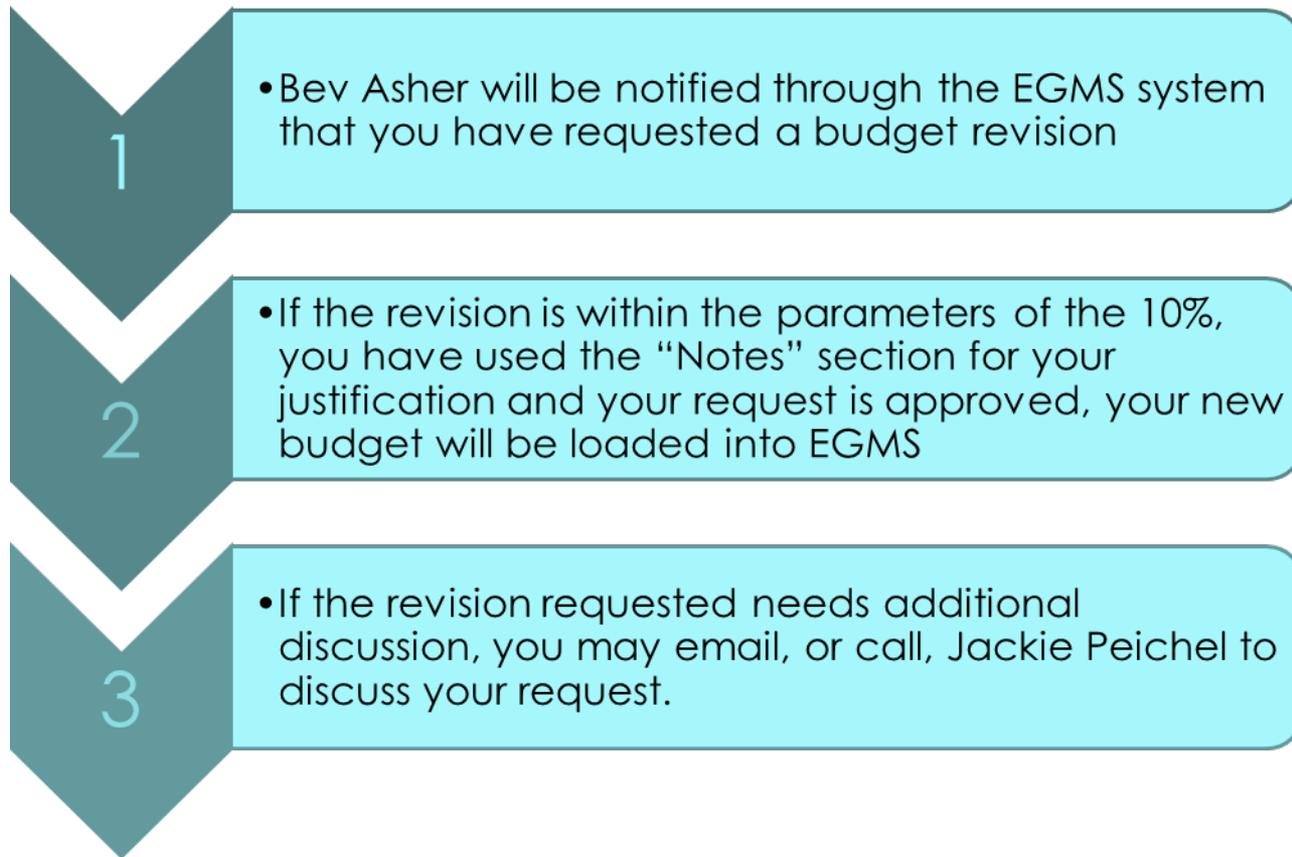
Category	Amount	Revised Amount	Total Expenditures	Variance %	RT%	Revised Budget?
Contracts	\$1,500.00	2000	\$1.00	00	000	False
Other	\$1,500.00	2100	\$400.00	00	000	False
Total	\$3,000.00		\$6,740.43			

The second table, titled "Community Service - Local Share", provides a detailed breakdown of expenditures:

Type	Budget Amount	Revised Budget Amount	Total Expenditures	Variance %	RT%	Revised Budget?
Personnel	\$14,275.00	14675	\$4,909.77	000	0	False
Travel	\$700.00	700	\$49.50	000	0	False
Communications and Utilities	\$300.00	300	\$224.85	000	0	False
Building Space	\$1,200.00	1200	\$1,250.00	000	0	False
Contracts	\$0.00	0	\$0.00	000	0	False
Equipment	\$0.00	0	\$0.00	000	0	False
Supplies	\$754.00	754	\$276.00	000	0	False
Volunteers	\$0.00	0	\$0.00	000	0	False
Outcasts	\$4,540.00	5540	\$0.00	000	0	False
Other	\$1,500.00	2000	\$0.00	000	0	False
Total	\$27,914.00		\$6,811.12			

Below the tables, there are fields for "Budget Type" (set to "Revised Budget") and "Budget Status" (set to "Pending"). A "Save" button is located at the bottom of the page, with a red arrow pointing to it.

What happens after I request a budget revision?



Reminders about budget revisions

The original budget is already loaded in the line items.

Only line items being changed need to be updated.

After making your changes in the line items, the total budget must remain the same or the system will not accept the change.

You may only make budget revisions within the 10% limit that is pre-set in EGMS. If a greater change is needed, you must talk with Jackie Peichel at 651-431-2583.

What if I need to change banks during the course of my grant?

- Make request using the [Bank Change form](http://mn.gov/mmb/assets/bank-change_tcm1059-126539.pdf) available at:
http://mn.gov/mmb/assets/bank-change_tcm1059-126539.pdf
- Copy and fill out the form and either mail it or fax it to:

Minnesota Management & Budget
File Maintenance – EFT
658 Cedar Street, Ste. 400
St. Paul, MN 55155
Fax number: 651-797-1305

Questions about this form?

Call the MMB EFT Helpline at 651-201-8106 or email at efthelpline.mmb@state.mn.us

Bank Change Request

http://www.mmb.state.mn.us/doc/swift/aap-bank-change.pdf state.mn.us

 **MINNESOTA Management & Budget**

Direct Deposit Authorization for Electronic Funds Transfer
AAP Bank Change Request

File Maintenance
400 Centennial Office Bldg
658 Cedar Street
St Paul, MN 55155

EFT Helpline 651-201-8106
Fax 651-797-1305
efthelpline.mmb@state.mn.us

Instructions for completing this form are on the back. Please print clearly and use black ink.

Mailing Address (General)

Name _____
Address _____
City _____
State _____ Zip Code _____ Vendor Number _____ Location _____

Contact Information - Please list person who can respond if additional information is required.

Contact Name _____
Email Address _____
Email Address for Payment Notification _____
(if different than above)
Phone _____ - _____ - _____ Ext _____ Fax _____ - _____ - _____

Tax Identification Information

Parent's SSN # _____ Parent's SSN # _____
Parent's Name _____ Parent's Name _____

Current Financial Institution Information *THIS INFORMATION IS REQUIRED*** Enter bank info we are currently depositing pmt to**

ABA Routing Number _____
Customer Account Number _____

Issues and Errors

YIKES!

Occasionally a user may encounter an error screen.



Minnesota Department of **Human Services**

EGMS

Enterprise Grants Management System

[Change ProgramUnit](#)

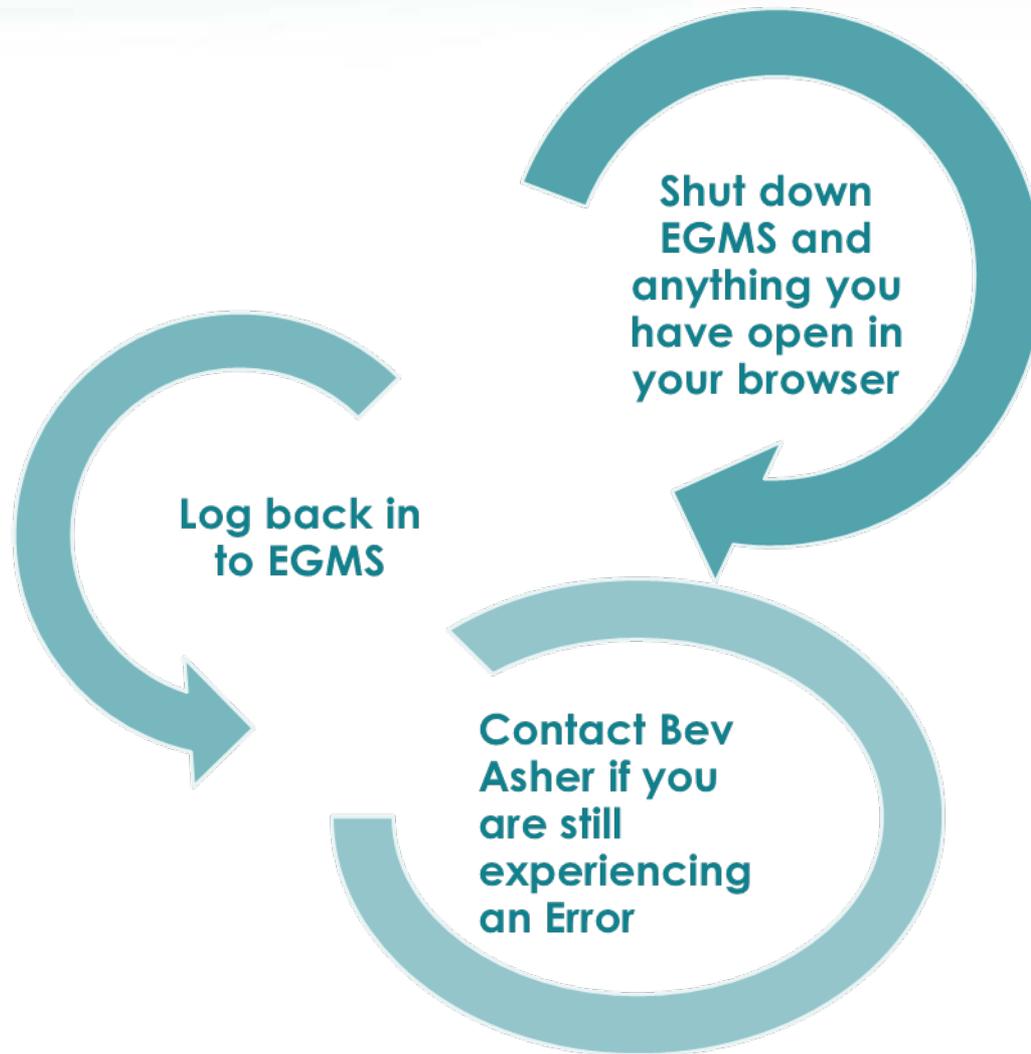
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An error occurred while processing your request!

The error has been logged and IT staff has been notified. We are sorry for any inconveniences this may have caused.

[Please click here to exit.](#)

What to do if the error does not clear



Change or removal of user

- A signed letter by your Board of Directors is needed to request a change of user of the EGMS system.
- Include the new user's name, address, email and phone number and email the letter to Bev Asher at bev.asher@state.mn.us
- Grantee shall also immediately inform STATE when an EGMS login and password is to be removed due to a staffing change

Final reminder/request

With the number of grants we process and service, it saves time and confusion for us if you include this information when sending an email or leaving a voice message:

- 1. Grant number**
- 2. Grant name**
- 3. Your email**
- 4. Phone number**

THANK YOU for helping us in this way!

Contact Information

Jacqueline Peichel 651-431-2583

jacqueline.s.peichel@state.mn.us

Bev Asher 651-431-4255

bev.asher@state.mn.us