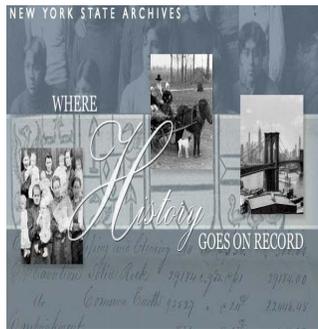


New York State Education Department  
New York State Archives  
Grants Administration Unit



New York State Archives'  
LGRMIF eGrants System

Reviewer User Manual

Cultural Education Center  
Grants Administration Unit  
Albany, NY 12203  
(518) 474-6926

January 2016

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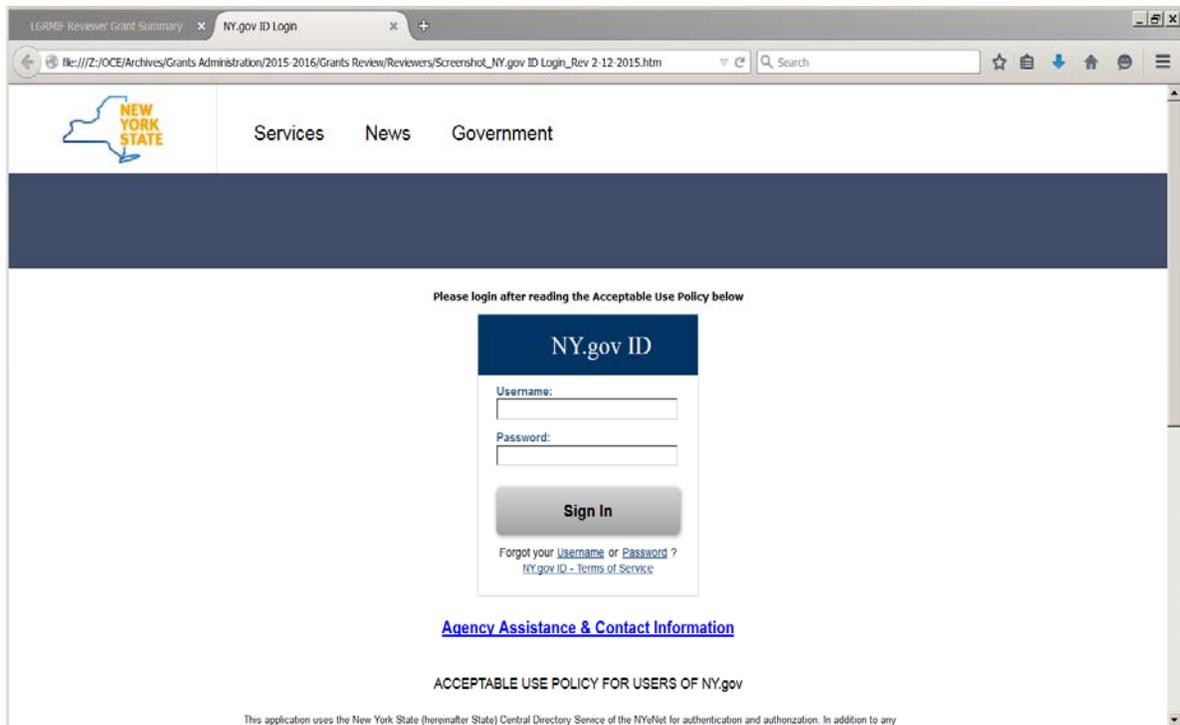
# Introduction

## How to Login to LGRMIF Online Grant System

The URL to the LGRMIF online grant system, eGrants, is <https://eservices.nysed.gov/ldgrants>. To login into eGrants you must have an NYSDS username and password. If you do not have a NYSDS username and password, you must register for one at:

<https://eservices.nysed.gov/ldgrants/ldgext/cnRegistration.do>.

Your username and temporary password will be sent to you via email.



1. Enter your username and password and click the “Sign In” button. Generally, the username is firstName.lastName, with a period between first and last names.
2. If you are logging in for the first time, you may be asked to change your password and set up security questions. The questions will be used to reset your password in case you forget it. Password requirements are:
  - a. Must be at least 8 characters long; one of which must be a numeric character
  - b. Cannot be the same as your username or default password

3. **If you forget your password**, click on the link labeled ‘I forgot my password.’ You will need to answer your security questions in order to reset the password. If you need additional help logging into the system please contact Denis Meadows at [Denis.Meadows@nysed.gov](mailto:Denis.Meadows@nysed.gov) or Stefanie Husak at [Stefanie.Husak@nysed.gov](mailto:Stefanie.Husak@nysed.gov).

## How to Update your Contact Information

1. It is very important to keep your contact information current, as you will be receiving notifications via the email address and mailing address you provide.
2. On the Reviewer Home page, click on the menu link ‘Contact Information’.

The screenshot shows a web browser window with the URL `file:///Z:/OCE/Archives/Grants Administration/2015-2016/Grants Review/Reviewers/Screenshot_LGRMIF Reviewer Contact Information.htm`. The page header includes the NYSED logo and navigation links: Home, Reviewer Home, Contact Information, At-Home Evaluation, Panel Deliberation, Decision Notes for Region, and Reports. The main content area is titled 'Update Contact Information' and contains a form with the following fields:

Salutation	
First Name	Mickey
Middle Name	
Last Name	Rooney
Title	Archives
Affiliation	NYSED
Phone (format 111-111-1111)	518-474-6926
Phone Extension	
Email	mickey.rooney@nysed
Address	CEC
City	Albany
State	NY
Zip Code	12230
Social Security ID (format 111-11-1111)	123-45-67
Vendor ID	

3. If any of the fields are incorrect, enter your updated data. The email address is a **required** field, as the system will send notifications to this address. **Note:** You only need to enter the first 7 digits of your Social Security Number.
4. Click “Submit” to enter and save any changes.

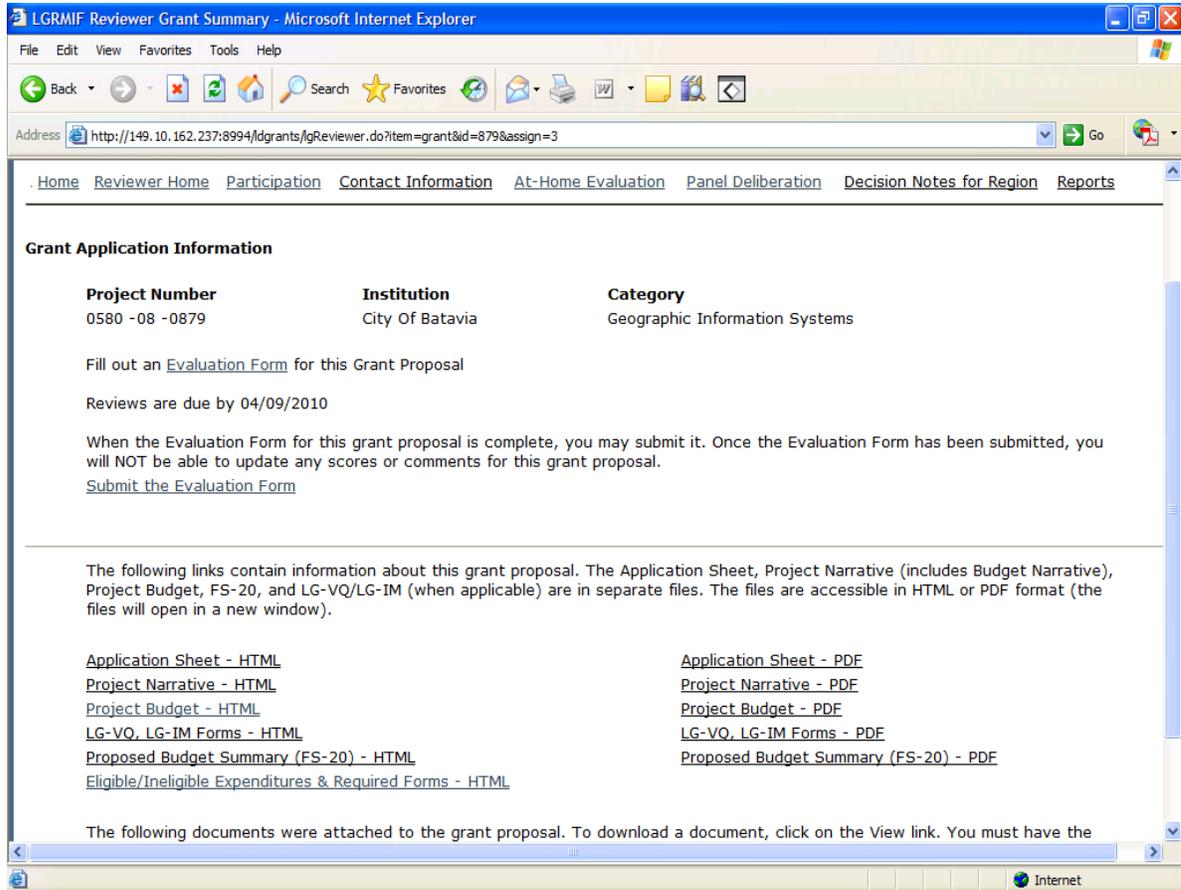


log back in, any data that was entered but not saved beforehand will need to be re-entered.

5. You can also access the Evaluation Form by clicking on the Project Number link of the corresponding application. This will take you to the 'Grant Application Information' page (see next section). Both the 'Form' and the 'Project Number' link will provide access to the application information for a particular proposal, such as the budget, narrative, attached documents, etc. Most parts of the application are available in both HTML and PDF format.
6. You may save an evaluation in progress, and return to it at another point in time. Additionally, it is not necessary to complete and/or submit your evaluations in any order per se, but please be sure that they are all completed and submitted by the required due date. **Exception:** Any evaluation that you have noted on your Conflict of Interest form should not be completed nor submitted by you. You should simply leave these reviews blank.
7. The column labeled 'Evaluation Submitted' will reflect 'Yes' if the evaluation form has been submitted to the Grants Administration Unit, and 'No' if the form has not been submitted. You **cannot** update an evaluation form that has been submitted.

## How to View an individual Grant Application

1. On the Reviewer's Grant Assignments page, click on the project number link for the grant application you wish to view. You will be sent to the following page:



2. The Grant Application Information page also has links to complete and submit the Evaluation Form for this proposal, and to view a PDF version of the Evaluation Form.
3. The bottom section includes HTML and PDF links to the four main parts of the grant application: the Application Sheet, Project Budget, Project Narrative (includes Budget Narrative as well), and the Proposed Budget (FS-10). A link to the Vendor Quote (LG-VQ) form is also available, when applicable. Additionally, there is also a link for Eligible/Ineligible Expenditures and Required Forms to assist you in determining appropriate expenditures and required forms necessary for each application.

There are also links to download documents that were attached to the grant application, if applicable. Click the link labeled 'View' to open or save the document. The document type column will contain information on the type of document that was attached. You must have the appropriate software in order to open the document type.

## How to Complete an Evaluation Form

1. On the Reviewer's Grant Assignments page, click on the link 'Form' to complete an evaluation for the corresponding grant application. On the Grant Application Information page the link to 'Fill out an Evaluation form' is found at the top of the page.
2. Enter your scores and comments for each section of the criteria, including subsections (a, b, etc.). Each criterion is based on a scale of 0-5, with 5 being the best score. You must assign scores of **0-5 only**, as the system will automatically calculate the total value for each criterion in the 'Total Score' field where multiples are involved.
3. Reviewers **must** now submit comments for any assigned score, as required by the Office of the State Comptroller (OSC). This information will allow us to explain and document to applicants why their application scored high, yet it is not being recommended for funding. It will also form the basis of debriefing letters, which all applicants may now request.

**Scores Defined**

5 = Outstanding  
4 = Good  
3 = Adequate  
2 = Fair  
1 = Poor  
0 = Unresponsive

**Rating Guidelines**

**Interpretation**

Applicant addresses the criterion with distinction  
Applicant has provided a cogent and convincing response to the criterion  
Applicant has addressed the criterion only competently  
Applicant may have addressed the criterion but is far from convincing, or the project is inherently weak in this regard  
Applicant has offered a few words in response to the criterion, but the words show little to no understanding of the issues  
Applicant does not address the criterion directly or indirectly

**Criteria**

**1. Statement of the Problem (20 Points)**

a. Describes the specific records management problem the project will address, provides qualitative descriptions and quantitative data about the problem and explains why the project is a high priority [10 points] (Assign score of 0-5, as the system will calculate the total value in the final score )

b. Identifies specific records that will be involved, and any previous grant-funded projects related to these records and this project. [5 points]

c. Explains why funding from this grant program is essential to accomplishing the project (For example, explains why funding is needed if funding was previously awarded for a similar project.) [5 points]

Comments:

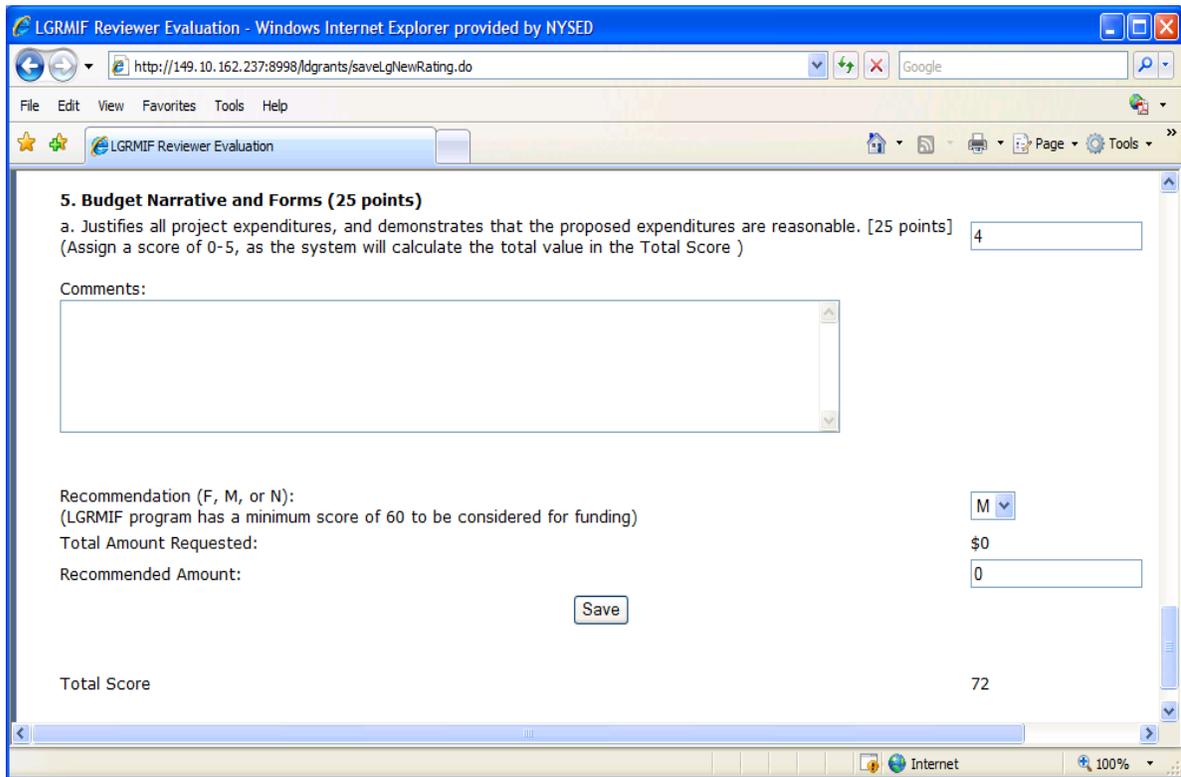
The description of the problem the project will address was insufficient. In addition, not all of the records series were identified. Finally, it was unclear why funding was essential to accomplishing the project, one that was similar to a project funded earlier by the LGRMIF.

**2. Intended Results (10 Points)**

a. Identifies each intended result and describes the anticipated benefits [5 points]

4. In section '5.', titled 'Budget Narrative and Forms', you should also provide here details of your recommended award amounts **by budget code, if necessary**. Additionally, but not in place of, you may also print a copy of the FS-10 for each proposal to mark-up and bring with you to the panel deliberation.

5. From the dropdown box select a funding recommendation (F, M, or N) for each proposal, and enter your **total** recommended award amount in the field that follows your fund recommendation. **Important:** Grants must have a minimum score of **60** to be considered for funding, full (F) or modified (M). **Note:** The default setting is no funding (N), so be sure you have selected the correct funding recommendation before saving and navigating away from this page.



6. For shared services grants, preference will be given to applications proposing to establish new shared services consortiums for the management of records and applications that propose to add additional local governments to an existing shared services consortium. Reviewers should add ten bonus points for any shared services application that meet this preference criteria.
7. Remember to click the “Save” button to save your evaluations before navigating away from this page. The totals for each category will be updated when you click Save. You can save your work and return to the form at a later date. Please remember that
  - a. You cannot update an Evaluation Form once it has been submitted.
  - b. You should save your work regularly, as the system will log you out if there is no activity for more than any 30 minute period. Additionally, any data that was entered but not saved will need to be re-entered.

## How to Submit an Evaluation Form

1. On the Reviewer's Grant Assignments page click on the project number link of the grant application you need to submit. On the Grant Application Information page click the link 'Submit the Evaluation Form'. **Note:** You **cannot** update an Evaluation Form after it has been submitted.
2. Click the "Submit" button to confirm you want to submit the evaluation form.

The screenshot shows a web browser window titled "LGRMIF Submit Reviewer Rating - Microsoft Internet Explorer". The address bar shows the URL: <https://eservices.nysed.gov/ldgrants/gReviewer.do?item=submit&p=lg>. The page header includes the NYSED logo and navigation links: Archives Partnership Trust, Office of Cultural Education, Online Catalog, Search, and Home. The main content area is titled "NEW YORK STATE ARCHIVES WHERE History GOES ON RECORD". Below this is a navigation menu with links: Home, Reviewer Home, Participation, Contact Information, At-Home Evaluation, Panel Deliberation, Decision Notes for Region, and Reports. The main section is titled "Reviewer Rating Form Submission" and displays the following information:

<b>Project Number</b>	0580 -08 -879
<b>Sponsoring Institution</b>	City Of Batavia
<b>Project Title</b>	Geographic Information Systems

Once the Rating Form and comments are submitted, you will NOT be able to update any scores or comments for this grant proposal. Click the Submit button to submit this Rating Form or Cancel to return to the Reviewer Assignments.

Do you want to submit the Rating Form and Comments for this Grant Proposal?

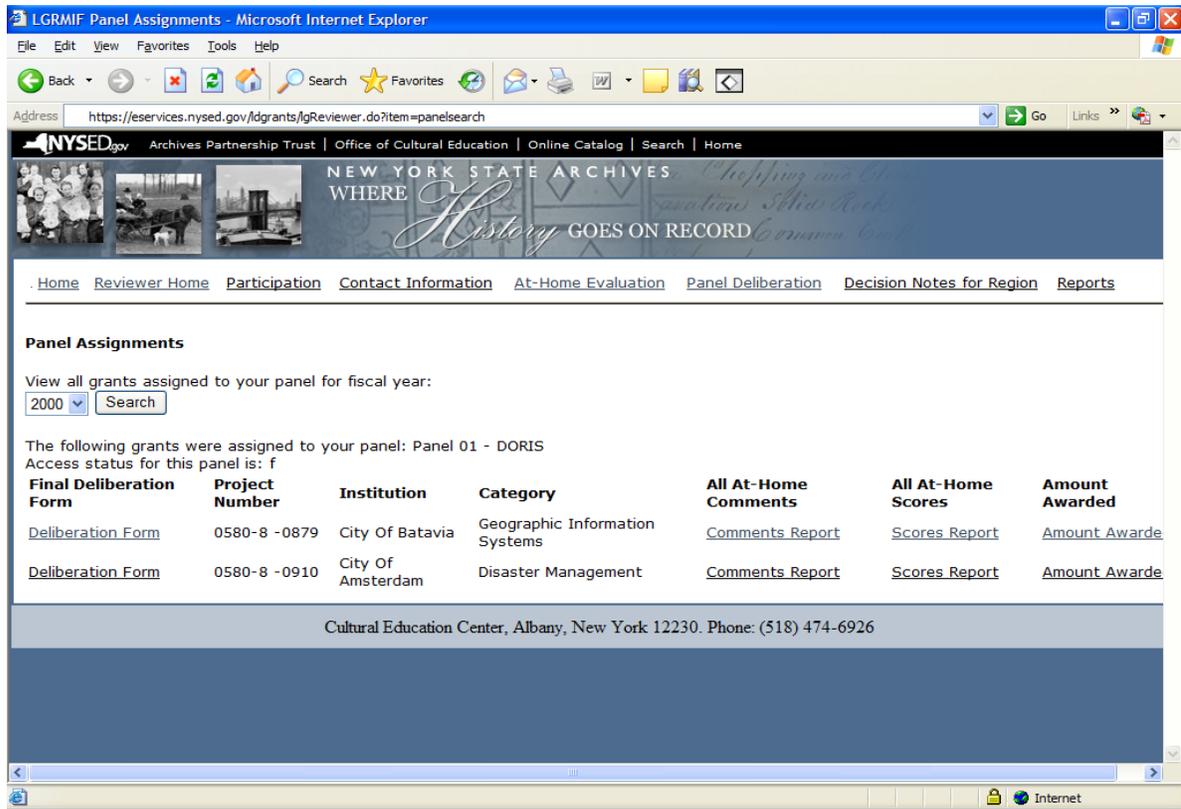
Cultural Education Center, Albany, New York 12230. Phone: (518) 474-6926

3. You will receive an email from eGrants confirming that the Evaluation Form was received by the Grants Administration Unit. In addition, under the 'Evaluation Submitted' heading on the Reviewer's Grant Assignments page, this column should change from 'No' to 'Yes' each time you complete and submit an evaluation form. Please be sure your email address is current. Again, you can update your contact information using the menu link 'Contact Information'.

# Panel Deliberation

## How to View Grants Assigned to the Panel

1. All members of a panel will be granted access to each other's reviews (see Comments Report and Scores Report for each proposal) 2 weeks before the final panel deliberation day.



2. On the Reviewer Home page, click the menu link 'Panel Deliberation'. At the dropdown menu, select the appropriate fiscal year (**the second year in a particular grant cycle; e.g., the 2016-2017 grant cycle will be listed only as 2017**), and click 'Search'. You should see a listing of the grant applications that your panel has been assigned to review.
3. To complete a deliberation form, click on the link 'Deliberation Form' next to the corresponding grant application. **Please remember to save your work regularly, as the system will log you out if there is no activity for more than any 30 minute period.** If you are required to log back in, any data that was entered but not saved beforehand will need to be re-entered.
4. To view application information for a particular proposal, such as the budget or narrative, click on the corresponding HTML or PDF link on the page.

## Panel Evaluations

### How to View an individual Grant Application

Once you are on the 'Panel Assignments' page, you will see links for the following: 'Deliberation Form', 'Comments Report', 'Scores Report', and 'Amount Awarded'.

The screenshot shows a web browser window titled "LGRMIF Panel Assignments - Microsoft Internet Explorer". The address bar shows the URL: <https://eservices.nysed.gov/ldgrants/fgReviewer.do?item=panelsearch>. The page content includes a navigation menu with links like Home, Reviewer Home, Participation, Contact Information, At-Home Evaluation, Panel Deliberation, Decision Notes for Region, and Reports. The main section is titled "Panel Assignments" and contains a search box for the fiscal year (set to 2000) and a search button. Below this, it states: "The following grants were assigned to your panel: Panel 01 - DORIS. Access status for this panel is: f". A table follows with the following data:

Final Deliberation Form	Project Number	Institution	Category	All At-Home Comments	All At-Home Scores	Amount Awarded
<a href="#">Deliberation Form</a>	0580-8 -0879	City Of Batavia	Geographic Information Systems	<a href="#">Comments Report</a>	<a href="#">Scores Report</a>	<a href="#">Amount Awarde</a>
<a href="#">Deliberation Form</a>	0580-8 -0910	City Of Amsterdam	Disaster Management	<a href="#">Comments Report</a>	<a href="#">Scores Report</a>	<a href="#">Amount Awarde</a>

At the bottom of the page, contact information is provided: "Cultural Education Center, Albany, New York 12230. Phone: (518) 474-6926".

1. Each grant application contains a:
  - a. **Deliberation Form**, which includes HTML and PDF links to the four main parts of the grant application: the Application Sheet, Project Budget, Project Narrative (includes Budget Narrative as well), and the Proposed Budget (FS-10). A link to the Vendor Quote (LG-VQ) form, when applicable, is also available. Additionally, the deliberation form contains the average scores per criterion from the At-Home review for the panel, along with a total average score and total average recommended award amount.
  - b. **Comments Report**, which details all of the At-Home comments associated with each grant application for each reviewer on the panel, including their name, funding recommendation (F, M, N), and recommended award amount.
  - c. **Scores Report**, which details all of the At-Home scores assigned to each grant application for each reviewer on the panel.

- d. **Amount Awarded** (Project Budget), where **each** budget code record with an ‘AmtRequested’ field populated **must** have the corresponding ‘AmtAwarded’ field completed. The total amount awarded for a proposal should equal the panel’s award recommendation in the ‘Recommended Amount’ field on the Evaluation Form. You will be able to view the grand totals for all budget category codes as you proceed with awarding each budget code with an award amount.
- e. **Amount Available and Awarded.** Right below the category grand totals you will see the amount available to the panel to begin the day, the amount awarded by the panel at any given point in time, and the amount of money that remains available to the panel to award (Difference). Again, the AmtAwarded field must be completed by the panel for each budget record submitted by the applicant, especially those applications recommended for modified (M), and no (N) funding. For (N) recommendations, all appropriate individual budget code records must be zeroed out.

The screenshot shows the 'LGRMIF Reviewer - Budget Approvals' web application. The main content area displays the following information:

Name	Title	Rate of Pay	Hours Worked
TBD	Clerk	\$20.00	1000.0
AmtRequested	AmtAwarded		
\$20,000	<input type="text" value="20000"/>		

**Professional Salaries Totals (Code 15)**

Amount Requested	Amount Awarded
\$20,000	\$20,000

**Grand Totals for all Budget Categories**

Amount Requested	Amount Awarded
\$20,000	\$20,000

**Amount available to panel:** \$1,000,000  
**Amount awarded by panel:** \$102,691  
**Difference:** \$897,309

**1. Professional Salaries (Code 15)**

## How to Complete a Deliberation Form

1. Click on the 'Deliberation Form' link for the grant application you wish to review.
2. The 'Decision Notes' field can be found near the bottom of the page. The text entered here will ultimately end up in the modified funding or no-funding letter to the applicant.

4. Email Management projects (5 points)

Total Final Score	58.0	58
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**Application Approval**  
Each application must be checked as approved or denied

Application Approved  
 Application Denied

**Justification for change, if any, from the Average of the At-Home Score**

no change from at-home score.

**Decision Notes**

Project not fundable because it lacked sufficient detail throughout the narrative. Additionally, three vendor quotes were required but not submitted.

3. After discussing each evaluation, the following fields must be completed by the panel:
  - a. **Recommendation** – Select F (Full Fund), M (Modified) or N (No Fund) from the dropdown menu. Again, grants must have a minimum score of **60** to be considered for funding, full (F) or modified (M).
  - b. **Recommended Amount** – Enter the panel's recommended total award amount.
  - c. **Total Score** – Enter the panel's "Total Score" for the proposal. **Important:** If there is a difference between the panel's at-home average 'Total Score' and the final panel deliberation 'Total Score', then an explanation must be provided in the 'Justification for Change' field as to why the score changed. If there is no difference between the at-home score and the final deliberation score, this field can be left blank.

- d. **Application Approved or Denied** – The system will check ‘Application Approved’ if the recommendation is to fund the application (F or M) or ‘Application Denied’ if the proposal is not recommended (N) for funding.

Criteria	At-Home Average	Final Deliberation
Recommendation (F, M, or N): (LGRMIF program has a minimum score of 60 to be considered for funding)		N
Recommended Amount:	\$11,024	0
Total Panel Score (rounded to the nearest integer)	54	54
<b>Bonus Scoring</b>		
1. Cooperative Project (10 Points)		
2. 1st Time Inventory & Planning (5 points)		
3. Electronic records inventory projects (5 points)		
4. Email Management projects (5 points)		
Total Bonus Points	0	0
<b>Total Final Deliberation Score</b>	<b>54</b>	<b>54</b>

**Application Approval**  
Each application must be checked as approved or denied

Application Approved  
 Application Denied

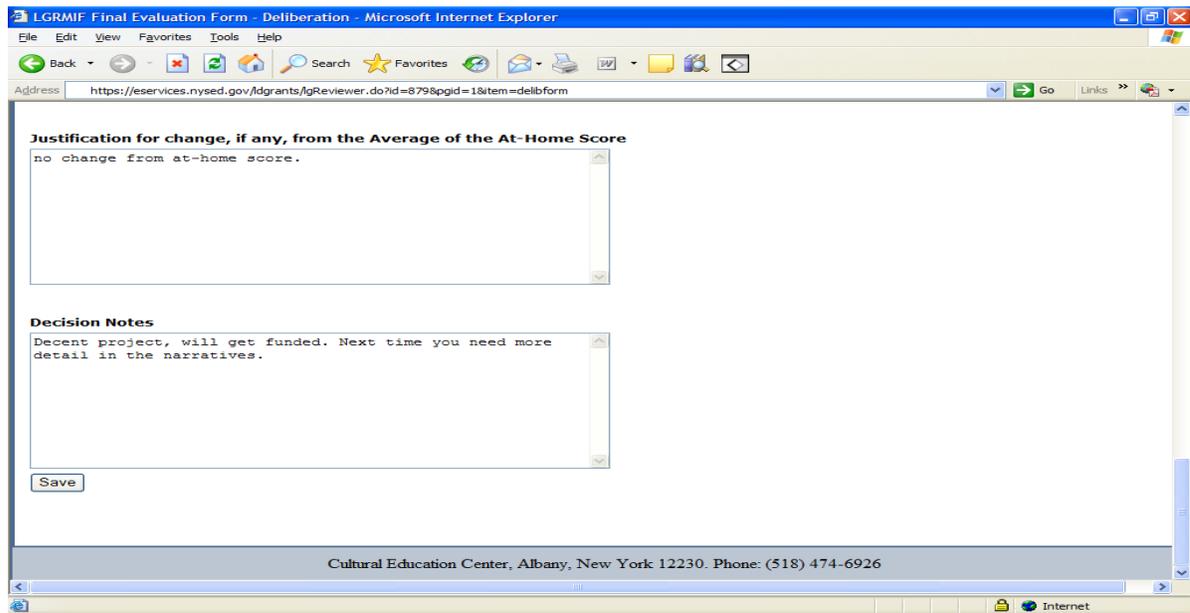
**Justification for change, if any, from the Average of the At-Home Score**

no change from at-home score.

- e. **Amount Awarded** - As a final reminder, on the ‘Panel Assignment’ page, **each** budget category code with an “AmtRequested” field populated **must** also have the corresponding “AmtAwarded” field completed by a panel member. The total amount awarded for a proposal should equal the panel’s award recommendation in the ‘Recommended Amount’ field on the evaluation form. If the amounts are not equal, you will receive a red error message. Be sure to correct the error before you move onto the next application.
4. **Remember** to click the Save button to save your evaluations before navigating away from this page. The totals for each category will be updated when you click Save. You can save your work and return to the form at a later time. Please remember that:
- a. You should save your work regularly, as the system will log you out if there is no activity for more than any 30 minute period. Additionally, any data that was entered but not saved will need to be re-entered.

## How to Submit a Deliberation Form

1. On the 'Panel Assignments' page click on the Deliberation Form link of the grant application you wish to submit. On the 'LGRMIF Final Evaluation Form (Deliberation)' page click the 'Save' button at the bottom of the form. There is no 'Submit' button; the form is simply saved to the system.
2. Your panel can update a Deliberation Form after it has been saved, as "full" access to a Deliberation Form, to make all allowable changes, will be granted to the panel for the entire day of panel deliberations.



The screenshot shows a web browser window titled "LGRMIF Final Evaluation Form - Deliberation - Microsoft Internet Explorer". The address bar contains the URL: <https://eservices.nysed.gov/dgrants/fgReviewer.do?id=8798pgid=18&item=delibform>. The main content area has two text input fields. The first field is labeled "Justification for change, if any, from the Average of the At-Home Score" and contains the text "no change from at-home score.". The second field is labeled "Decision Notes" and contains the text "Decent project, will get funded. Next time you need more detail in the narratives.". Below the second field is a "Save" button. At the bottom of the page, there is a footer that reads "Cultural Education Center, Albany, New York 12230. Phone: (518) 474-6926".

3. After final deliberations are complete, all panels will be relegated to a "partial" access status. This status will permit panel liaisons to make text changes only. Any changes beyond text should be referred to the Grants Administration Unit.
4. Partial access will remain in place for each panel liaison and/or Regional Advisory Officer (RAO), up until the latter completes their weeklong review of the text for the grants in their respective regions. The level of access after this review period will then be "none" for everyone.

## Additional Information

### Accessing Documents LGRMIF Grant Review Documents

1. The Reviewer Home page and the Help page both contain links to documents regarding the LGRMIF grant review.
2. The Help page has a link to the LGRMIF Online Grant System Reviewer Help manual. The manual has instructions and screenshots for reviewer-specific web pages.
3. The LGRMIF Reviewer Evaluation Form (At-Home) document is a blank version of the Evaluation Form listing each of the evaluation criteria. You can print this out and write in scores as you review the grant proposal, then just type the scores into the online Evaluation Form.
4. The LGRMIF Summary Evaluation Form (Deliberation) document is a blank version of the Evaluation Form that will be used as a summary template for each grant application that has been submitted for review.
5. The Conflict of Interest Form document (pdf is a fillable version), which should be completed by a reviewer IF there is a conflict of interest in reviewing a particular proposal(s). Only **one** completed form per reviewer, regardless of the number of conflicts identified, should then be submitted via email to [archgrants@nysed.gov](mailto:archgrants@nysed.gov).
6. The Eligible/Ineligible Expenditures and Required Forms document is available here to assist you in determining appropriate expenditures and required forms necessary for each application. A link to this document is also available in eGrants for each application.

## Additional Help

1. For instructions on using the LGRMIF Online Grant System, consult the Reviewer User Manual on the Help page, or any of the other attached documents.
2. If you have a question regarding the LGRMIF grant program, the review process, types of eligible funding, etc. please contact the Grants Administration Unit at [archgrants@nysed.gov](mailto:archgrants@nysed.gov) or 518-474-6926.
3. If you need to report an error message, issue, or question regarding the Online Grant System, contact:
  - Denis Meadows at [denis.meadows@nysed.gov](mailto:denis.meadows@nysed.gov) or 518-474-5614,
  - Mark Maniak at [mark.maniak@nysed.gov](mailto:mark.maniak@nysed.gov) or 518-474-4485, or
  - Stefanie Husak at [stefanie.husak@nysed.gov](mailto:stefanie.husak@nysed.gov) or 518-474-5839

Please include a description of which page you are viewing, the complete error message, or a screenshot of the page in question.