WEST VIRGINIA HIGHER EDUCATION POLICY COMMISSION

HEALTH SCIENCES DIVISION

GRANTS PORTAL USER GUIDE

WEST VIRGINIA
Higher Education
Policy Commission

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Setting up your account

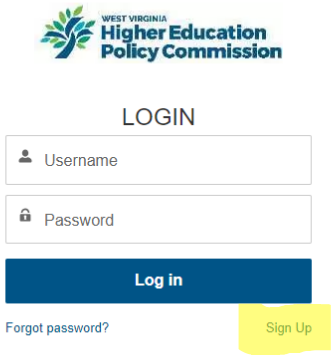
Requirements prior to signing up for an account

Prior to registering for a user account in the portal, please make sure that your organization is registered in wvOASIS as a vendor with the state of West Virginia. If your organization is registered, you will have a vendor number and organization name. If you are unsure, check with your fiscal office to obtain this information before creating an account.

- If your organization is not registered as a vendor with the state, it must register to receive electronic payments from the state before registering. Please visit http://www.state.wv.us/admin/purchase/vendorreg.html to register as a vendor with the state.
- Additionally, we recommend all grant applicants, both those already registered as state vendors and those who are newly registering sign up to receive electronic fund transfers. Being signed up for electronic fund transfers will speed up the time by which you will receive your grant awards from our division and from other state agencies. The instructions for signing up for electronic fund transfers can be found here: https://www.wvsao.gov/ElectronicPayments/Default.

Registering as a user in the Health Sciences Grant Portal

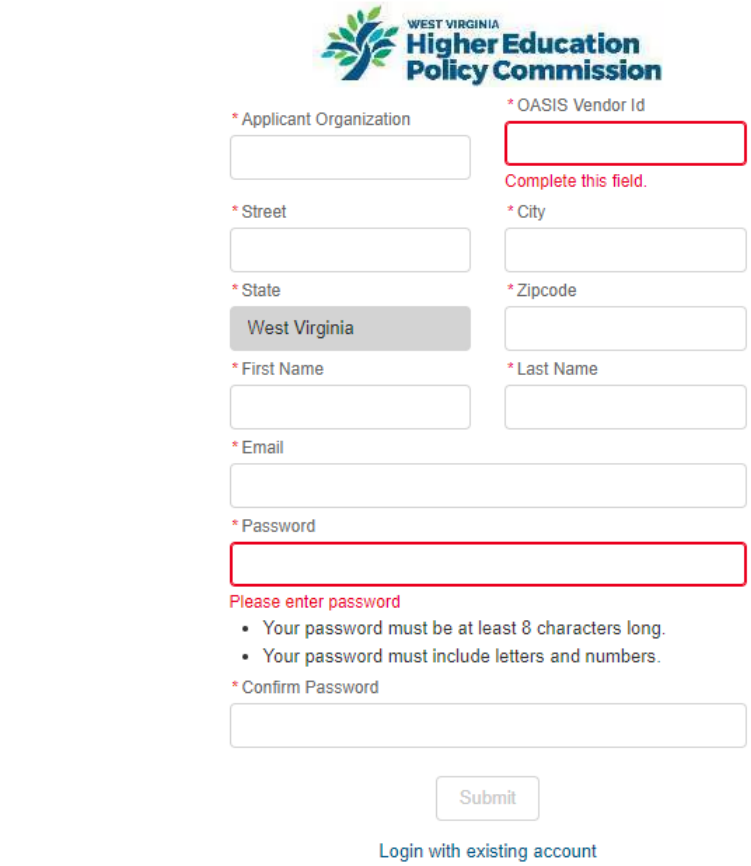
You must register as a Health Sciences Grant Portal user to apply for grants and manage all grant functions, including applications, reports, invoices, and change orders. You must register for Sciences Grant Portal user to apply for grants and manage all grant functions, including applications, reports, invoices, and change orders. To start the process, first access the grants portal at https://HSGrants.force.com. You will see the screen below each time you access the portal:



To register for an account, click “Sign Up,” in the lower right corner below the login fields. When signing up, you will need the following information:

- Make sure every space with an asterisk (*) is completed.
- Organization name (please be sure this matches **EXACTLY** as it is stated with your wvOASIS vendor number; if it does not match exactly, we will encounter issues processing any grant payments for your awards)
- Organizational address (please be sure this matches **EXACTLY** as it is stated with your wvOASIS vendor number and should be where you want your check mailed if you are not set up for electronic fund transfers; if it does not match exactly, we will encounter issues processing any grant payments for your awards)
- wvOASIS vendor ID number; this number MUST be 12 digits in length and the first two spaces may contain VC or VS in lieu of digits.
- Your name and contact information

If your college or university will be using a Research Corporation to receive and manage your grant funding, please be sure to list the organization associated with your account as the Research Corporation (along with their address and vendor number) to ensure that funds are transmitted to the correct entity.

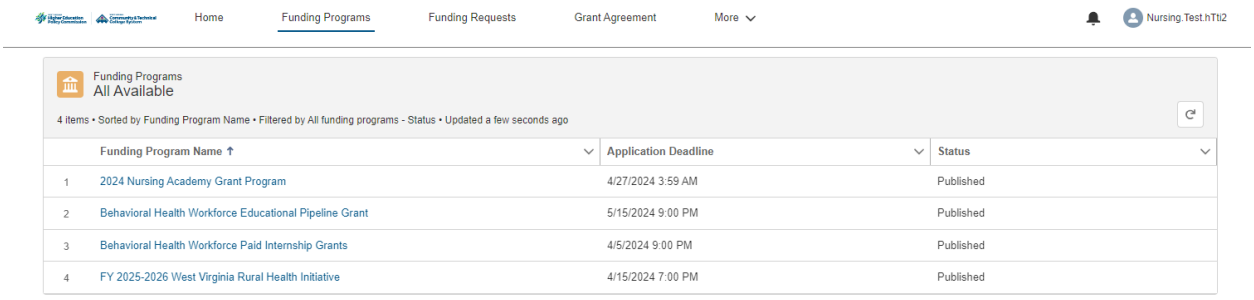


You will also need to set up a password. This password, along with your email address, will be used each time you login to the account after registering. Please DO NOT share your login credentials with others. Each user in the system should register themselves and have their own login credentials.

Applying for a grant using the Health Sciences Grants Portal

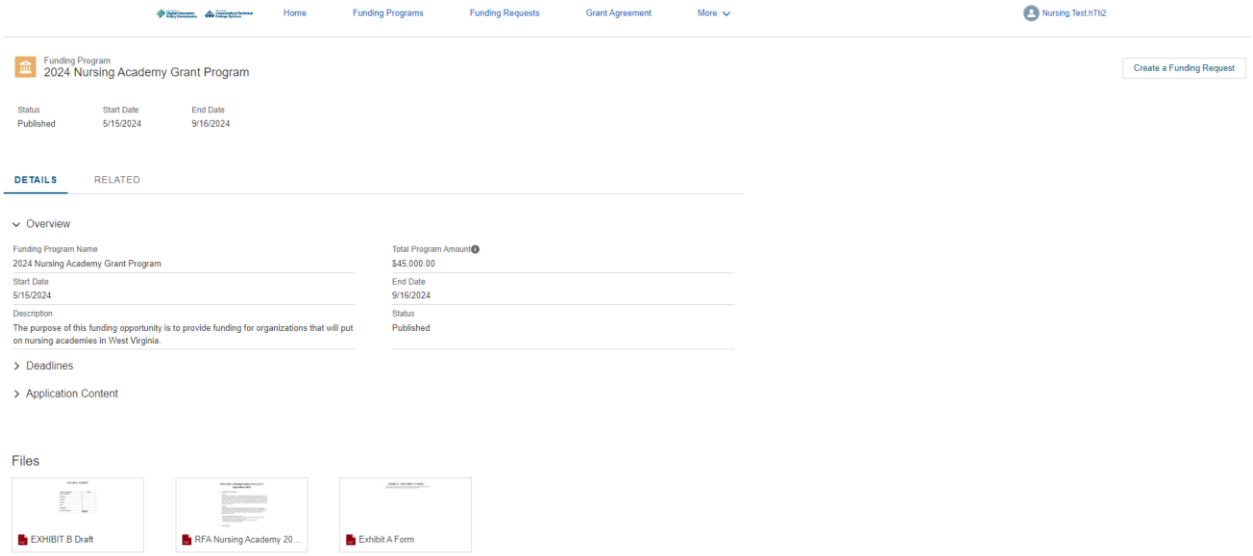
Viewing open grant opportunities

After creating your account, you will see the above home page when logging in. To view open grant opportunities, select, "Funding Programs," at the top of your screen. You can also select the, "Apply for a Grant" button under the "Overview" section. See the photo below to see an example of what your available funding programs will look like.



To view the contents of an open funding opportunity, click on the funding program name. On this screen, you will see basic grant opportunity information, including the state and end dates for the grant, the total program funding available for the program, report deadlines, invoice deadlines, and request for application details. Attached to

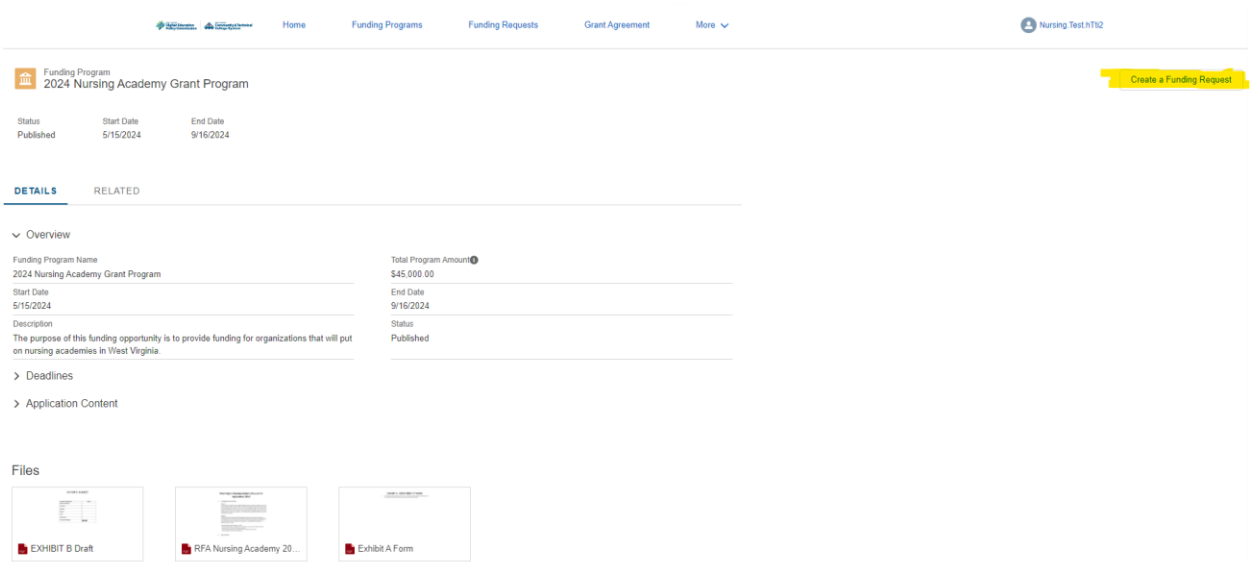
each funding program, there will be a Request for Applications that details specific information that should be included in the grant application.



Applying for a grant

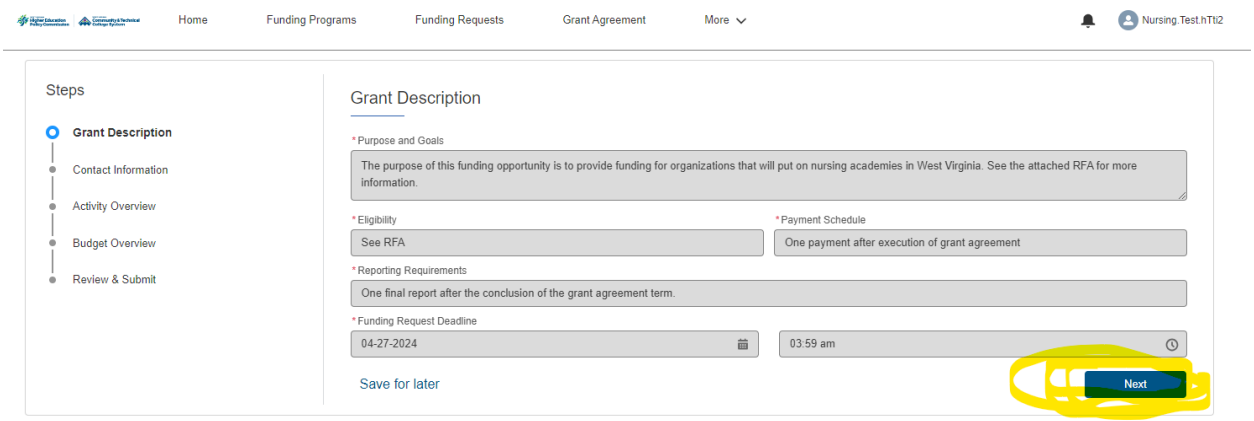
One important thing to note before you apply for a funding request is that if you are the applying individual, you will also be the only user associated with this grant who can edit your grant agreement information, upload reports, and submit change orders. If you do not want to be the person responsible for this, please be sure another in your organization applies instead.

Once you have found a grant opportunity you would like to submit an application for, click on the funding program name and click on the, “Create a Funding Request” button in the top right side of your screen.



Grant Description

After clicking the button to create a funding program, you will be taken to the funding request application. The first screen will be pre-populated with the grant information. Please select, "Next" to proceed to the next step.

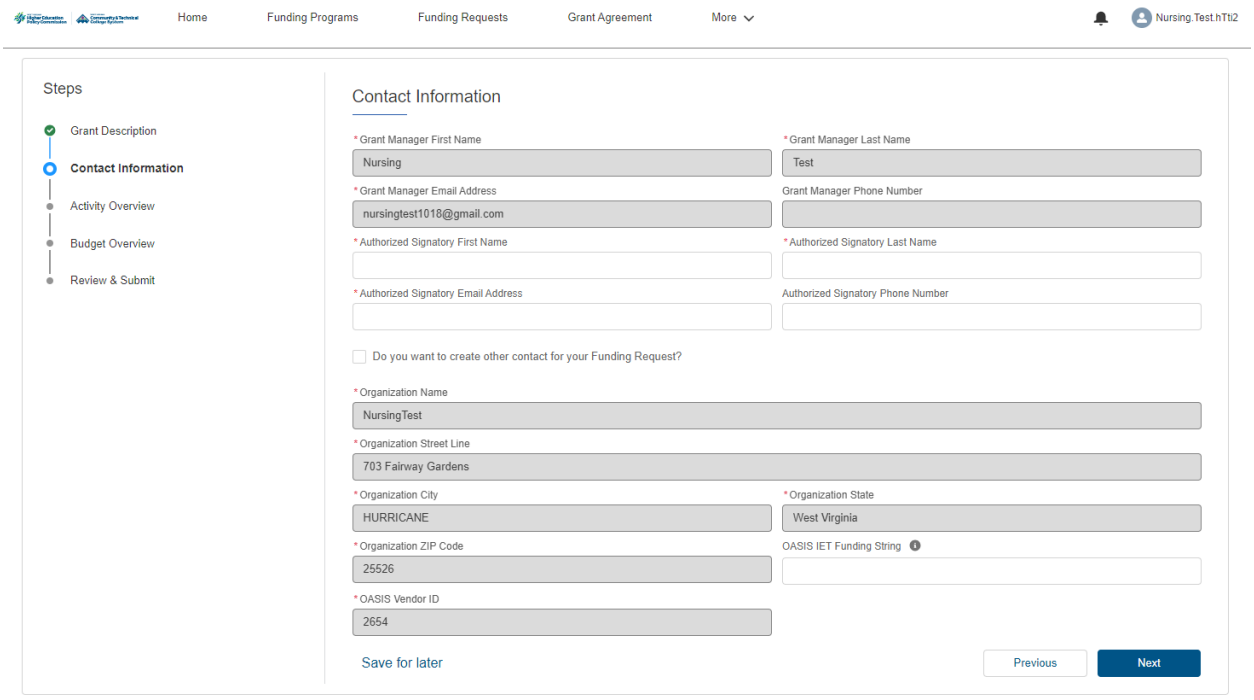


Contact Information

On the next screen for "Contact Information," you will find some pre-populated information based on your super account along with some other fields you will need to fill out. If any of the greyed-out fields look incorrect, please contact Deloris Vance at Deloris.vance@wvhepc.edu to have your user information corrected.

- You will be asked to provide an authorized signatory for your grant. This person will be with your organization authorized to sign off on grant agreements. Once a grant agreement is generated, they will be sent a SignNow form to complete the grant agreement.

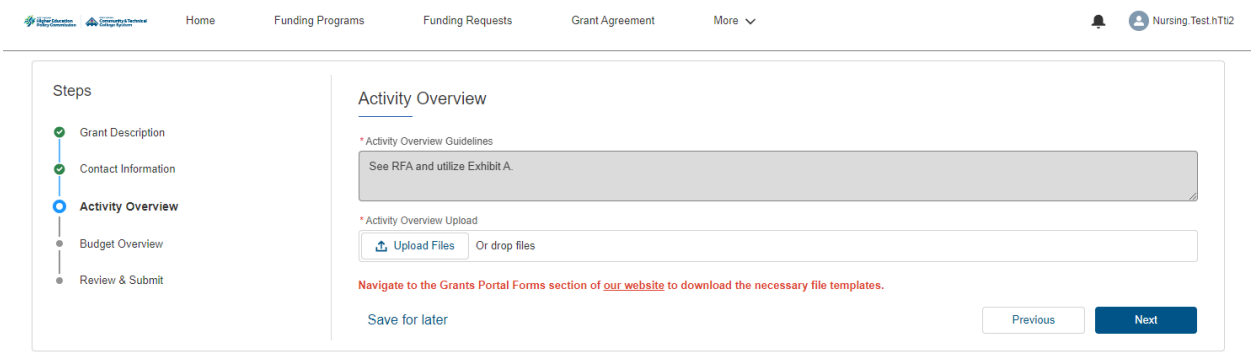
- You have the option to list other contacts for your funding request. Click on the check box for "Do you want to add other contacts to the funding request?" Be aware that other contacts must be existing users of the portal. If they have not already signed up as users, you will not be able to add them as other contacts. Please Note: If a contact(s) is not added at the initial setup of the fund request and are added later they will not be able to upload any documentation because the system doesn't re-activate back to the beginning. Other contacts can view grant applications and information but cannot edit a grant application. But they will be able to upload reports and change orders. If your organization has a pre-award or award portal, please put the contact(s) name and the email associated with the portal.
- If you are a state agency and can receive grant funds through IETs, you must supply your wvOASIS IET funding string. It is ESPECIALLY important that you allow us to provide your funds through electronic fund transfer and allow you to access your funds more quickly. If you are unsure of what this number is, check with your business office.
- Once you have filled out the required fields, click the Next button at the bottom of your screen.



Activity Overview

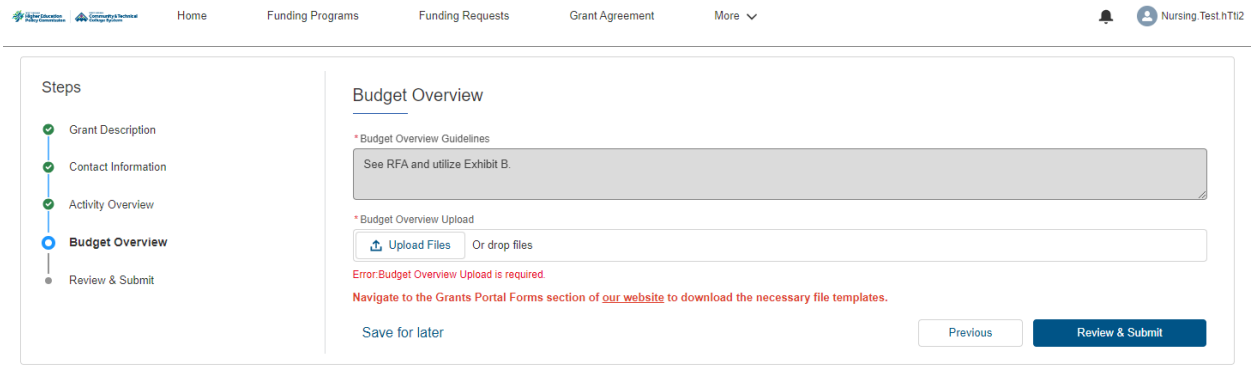
Once you have hit next on the last string, you will proceed forward to the Activity Overview. On this screen, you are expected to upload documents per the instructions found on your RFA (Request for Application). If specific documents are not included in the files within the funding opportunity, visit our website to download the necessary file templates.

When you want to upload a document, either click the Upload Files button or drag files over to the field to upload them. Once you have finished uploading your required documents, click the Next button at the bottom right of the screen.



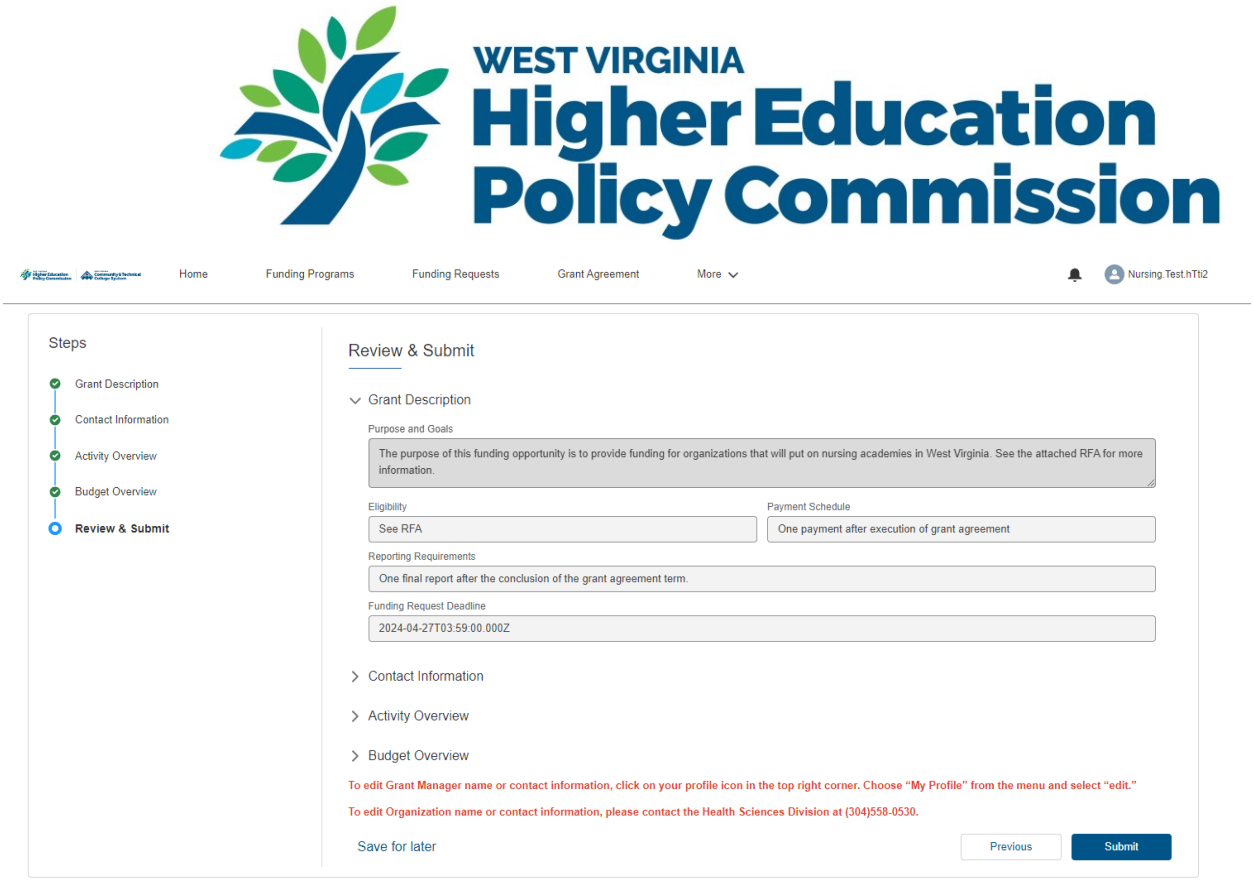
Budget Overview

Once you have hit next on the last screen, you will proceed forward to the Budget Overview. On this screen, you are expected to upload documents per the instructions found on your RFA. If specific documents are not included in the files within the funding opportunity, visit our website to download the necessary file templates. When you want to upload a document, either click the Upload Files button or drag files over to the field to upload them. Once you have finished uploading your required documents, click the Next button at the bottom right of the screen.

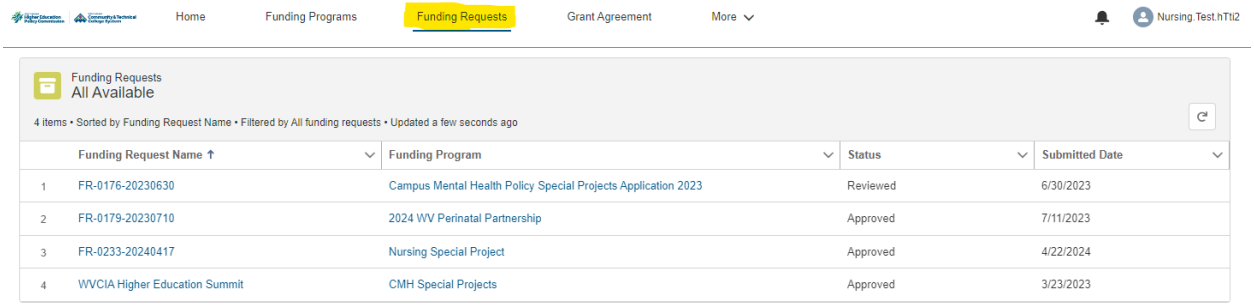


Review and Submit

Once you have clicked Next on the last page, you will be taken to the Review and Submit section. Within this section, you will see all the information you provided for your application. Please be sure to review each section to ensure everything is correct.

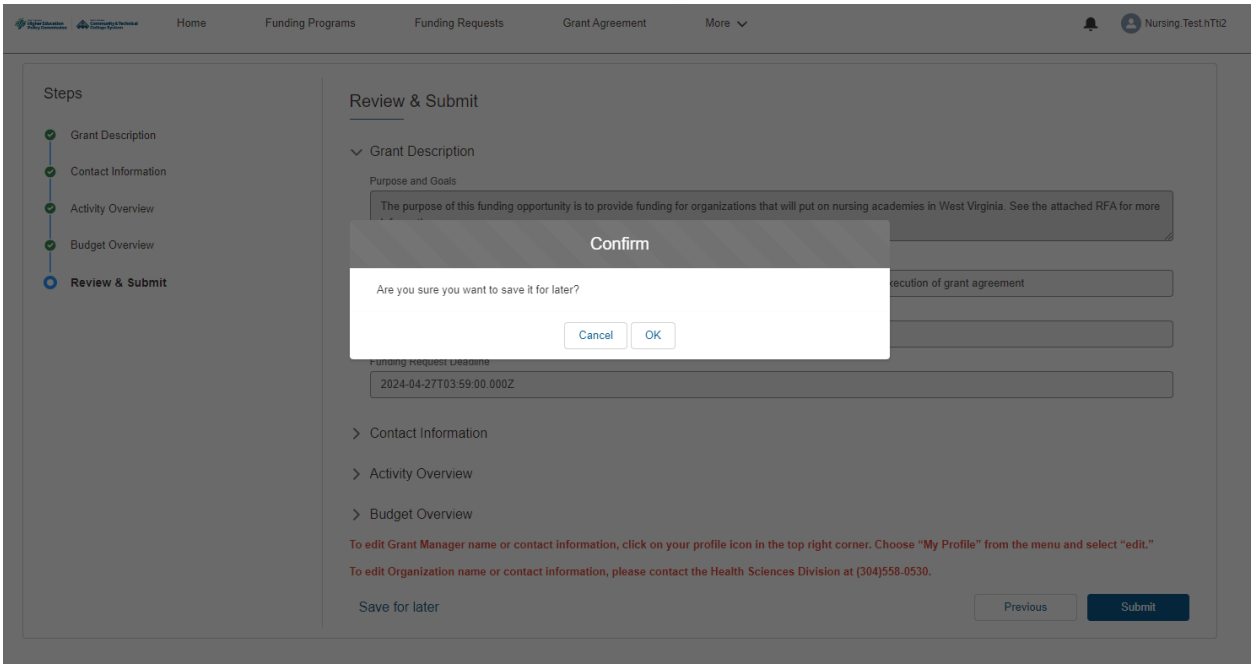


Once you are sure that everything is correct, hit the submit button. After hitting submit, you can view your funding request by clicking on the "Funding Requests" tab at the top of the portal.



Saving your application for later

At any point when submitting a funding request, you can save your application for later. When clicking the button, you will be asked if, you are sure. If you click Ok, you will proceed to another webpage. If you select cancel, your application will not be saved for later and you will return to the existing webpage.



If you clicked okay, your page would look like the photo below. You will be given a link to your saved funding request to edit later and have the option of having the link emailed to you so that you are able to access it later.

Funding request next steps

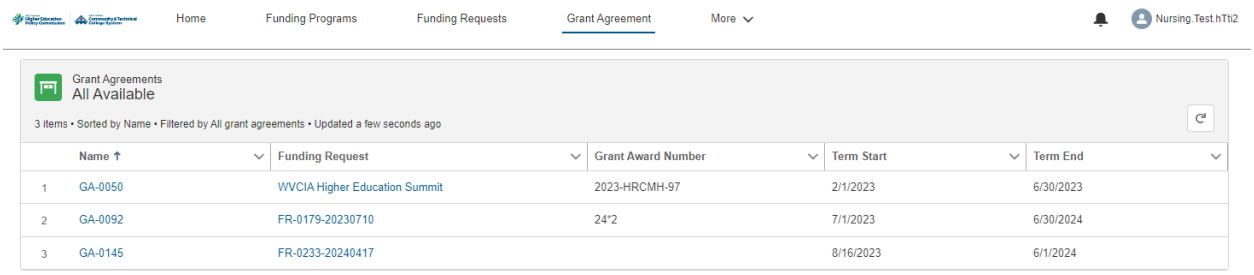
Once submitted, your funding request will be reviewed by staff within the Health Sciences Division. Under funding requests, you will be able to see the funding request status. The possible statuses are:

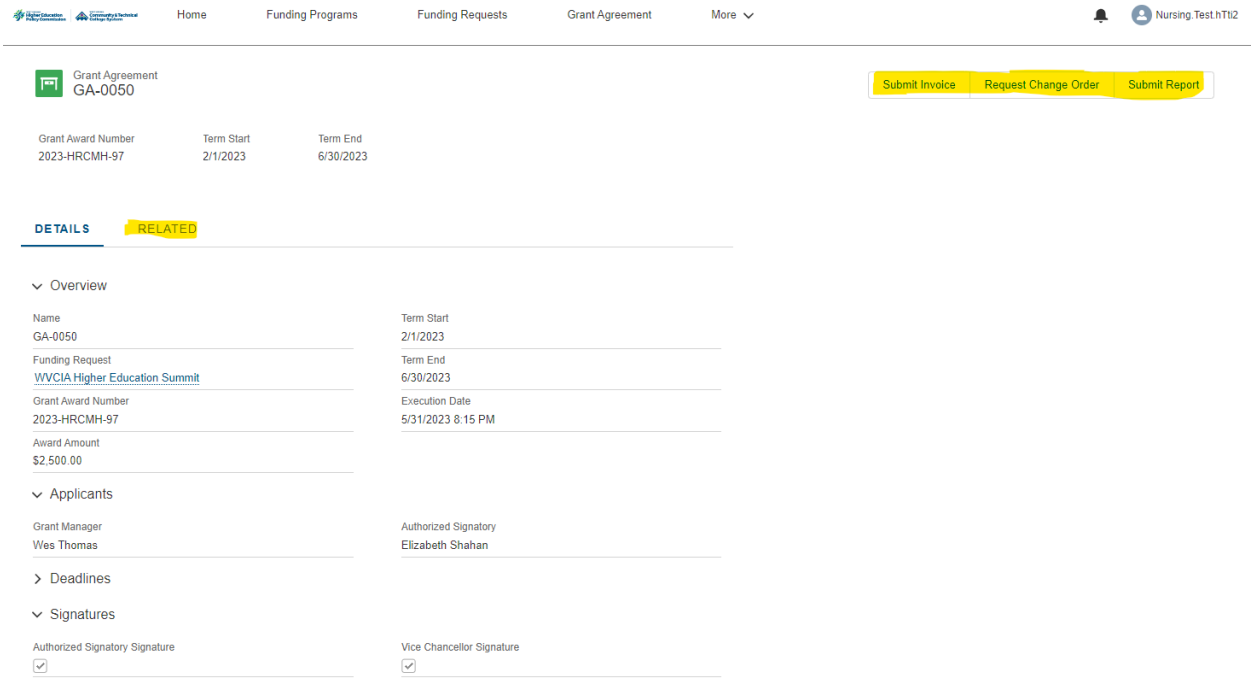
- Submitted – you have submitted your application, and it is pending moving into the review status.
- In review – your application is within the review process and is pending an award decision.
- Needs revisions – staff have contacted you about a revision needed within your application before it can be approved. You must upload any requested changes to the related tab within your funding request.
- Approved – your application has been approved. Staff will be in touch with you regarding executing the Notice of Grant Agreement (NGA).

Grant Agreement Execution

If your funding request is approved, your authorized signatory will need to sign off on the Notice of Grant Award (NGA) before the grant can proceed forward. The NGA will be sent to your indicated authorized signatory that was provided on the grant application and will be sent via SignNow. The NGA should be reviewed and signed as soon as possible as your grant activities cannot start before the NGA is fully executed.

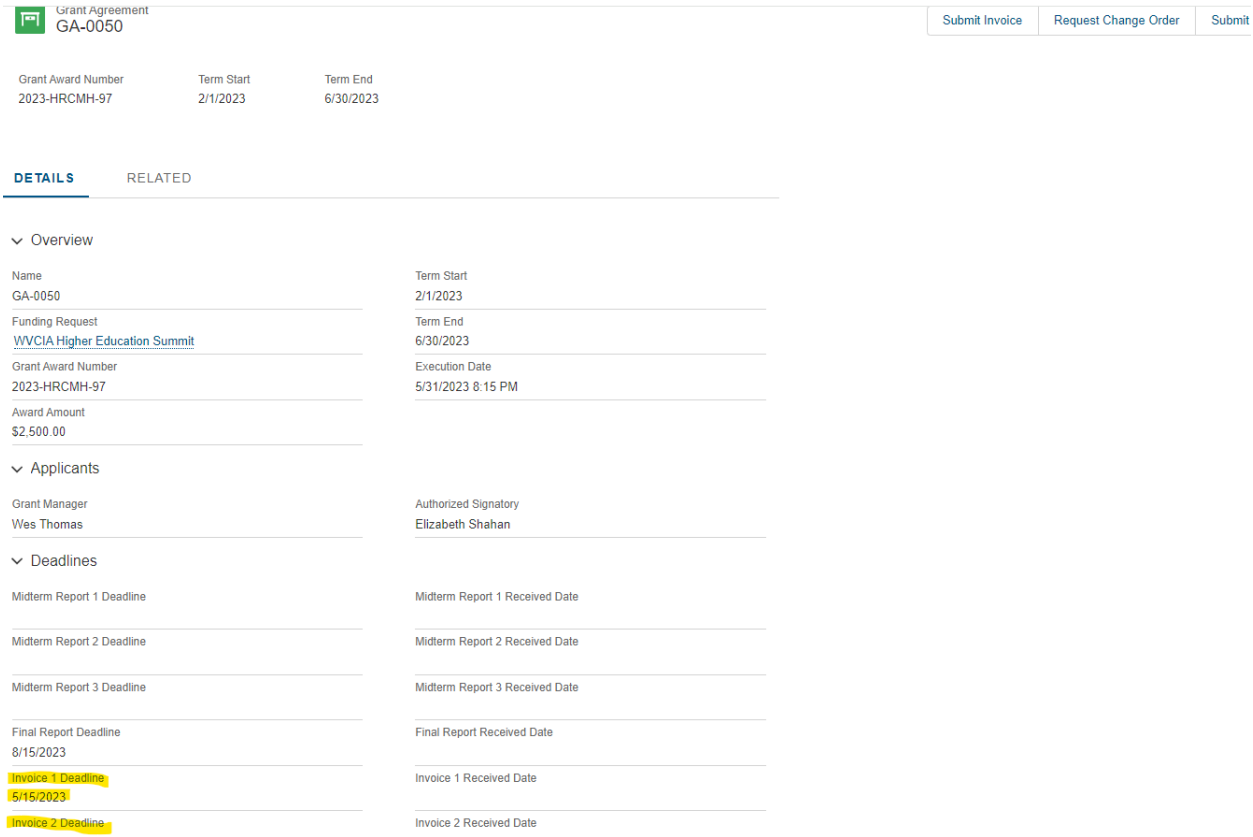
Once the NGA has been signed by all parties, a copy of your executed grant agreement can be found under the Grant Agreement tab. Click on the grant agreement number and click on the related tab to see your executed grant agreement. Reminder: That invoice(s) submitted prior to full execution of the grant agreement cannot be processed for payment.



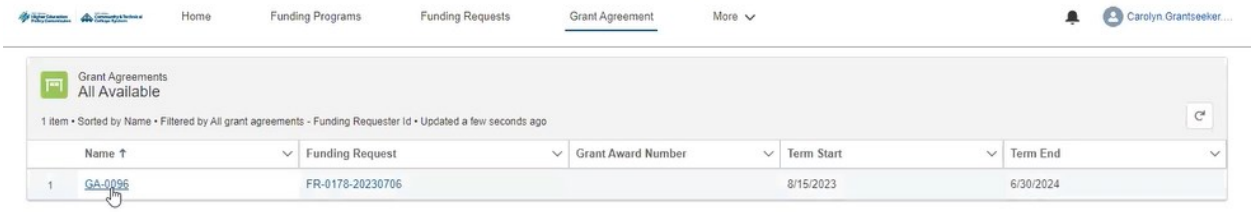


Submitting an Invoice

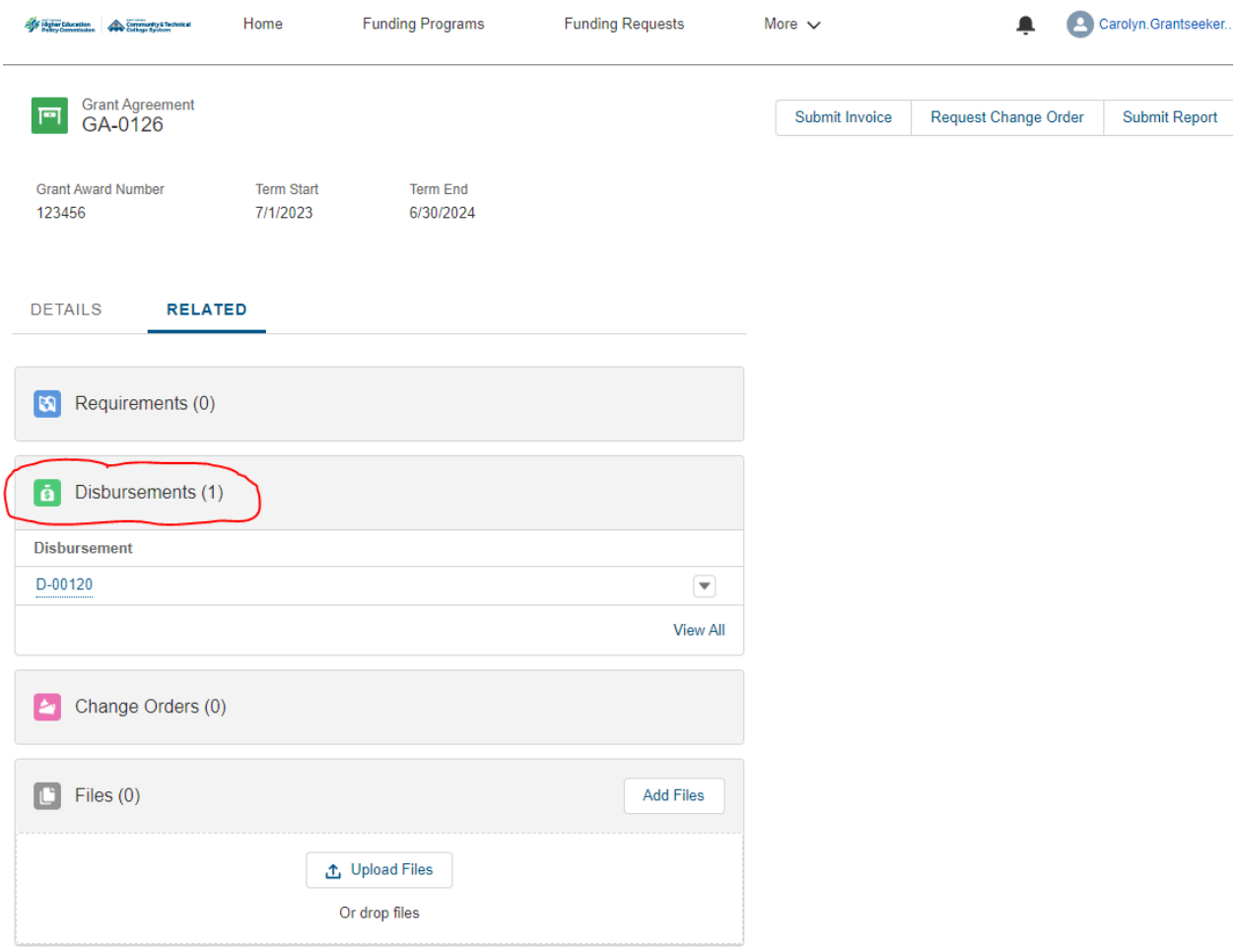
Invoices should be submitted based on the schedule detailed within your NGA. Most grants require a single invoice, but others may be spread throughout the year. To view the due dates for your invoices, Check the Deadlines section of your Grant Agreement. All invoices should be submitted within 15 days (about 2 weeks) following the execution of a grant agreement. Invoices received later than 45 days (about 1 and a half months) following the end of a grant agreement may not be honored. Timely submission of invoices is essential to ensuring the availability of funds.



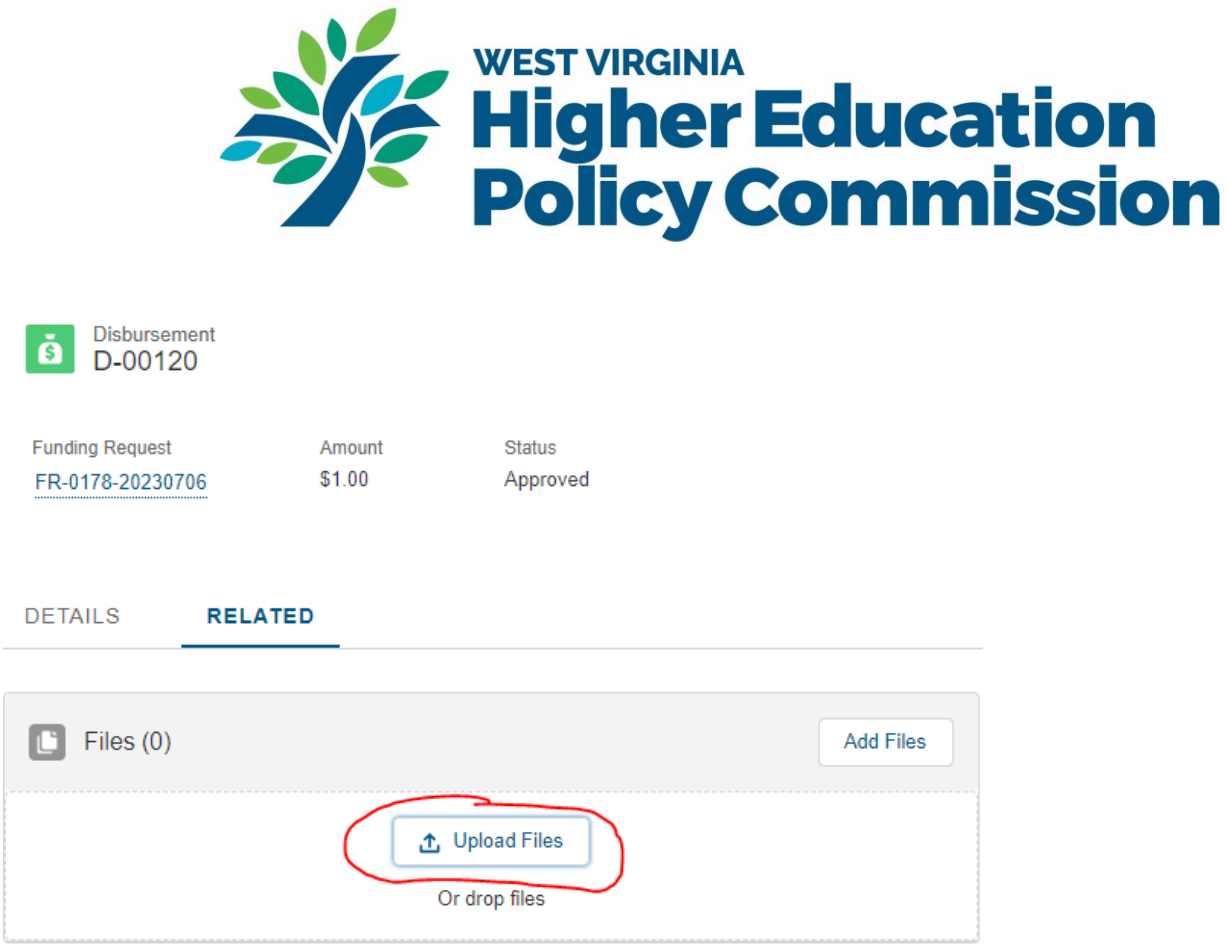
To submit an invoice, you should access your grant agreement under the Grant Agreements tab on your home page. Click on the grant agreement number.



Once you have selected your grant agreement, you want to click on the Related tab. On the related tab, you will see a disbursement listed under the Disbursements section. Click on the Disbursement number.



Once within the Disbursement, you will select the Related tab and upload your invoice in the files section.



We have a fillable invoice PDF on our website. You may use your own invoice template, but it should include all the following:

- Organization name (should match both NGA and wvOASIS vendor number)
- Vendor number
- Invoice number
- Invoice date
- Organizational address
- Organizational phone number
- Lead contact email address
- A "to" section with the following: West Virginia Higher Education Policy Commission Attn: Deloris Vance 1018 Kanawha Blvd. East, Suite 700 Charleston, WV (West Virginia), 25301
- Payment of award number
- Amount of invoice
- Dates of service
- A brief description of the award being invoiced for
- IET funding code (if applicable)
- Signature
- Printed name

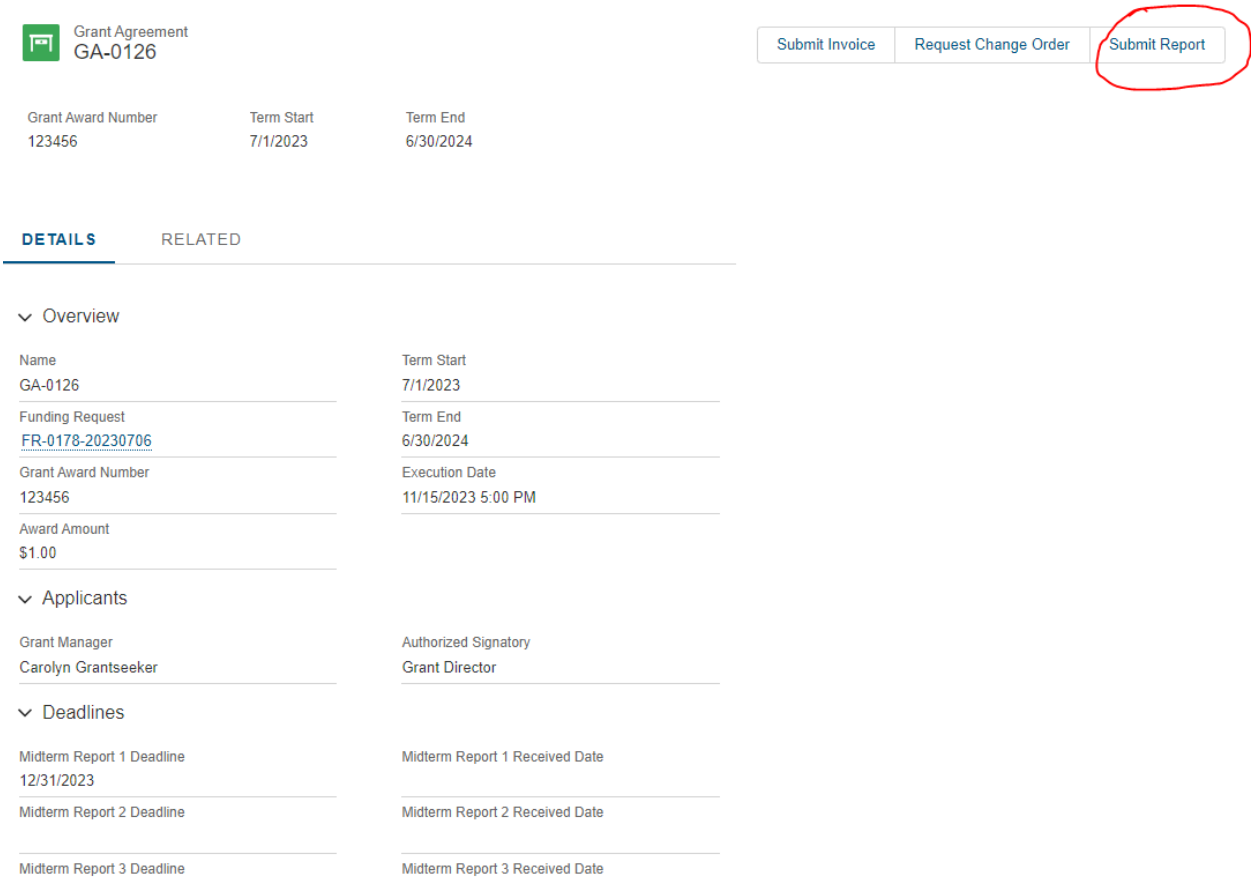
Reporting

Most grants will require both mid-term reports and final reports. See your grant agreement deadlines in the portal to see when your reports are due and ensure they are submitted by the due date. If you have a report that does not require a budget narrative, please upload the progress narrative twice, once in each required field, to satisfy requirements within the grants portal.

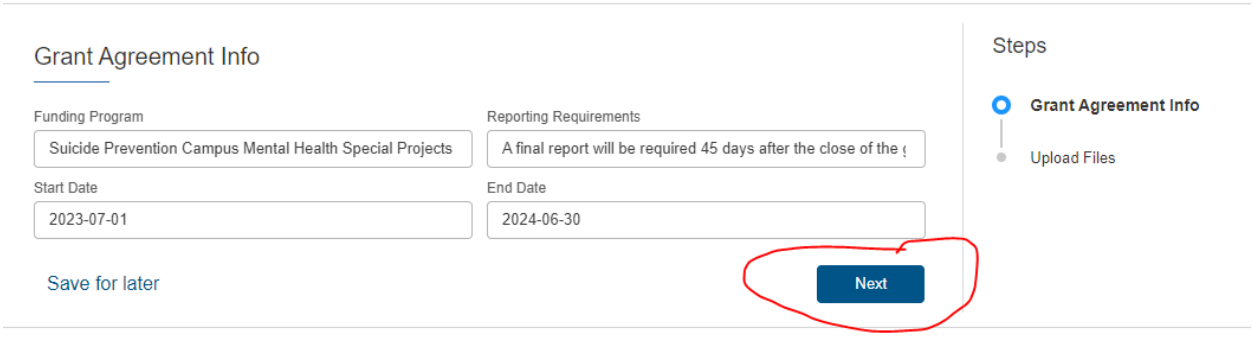
Templates for reports can be found on our website.

Both mid-term and final reports should be detailed. Most midterm reports will only require a narrative report on how the grant is progressing based on the statement of work you provided previously. Final reports will require both a narrative and a final budget justification. For more specifics about the required reporting, consult the RFA and email programmatic staff for instructions if you are unsure what is required.

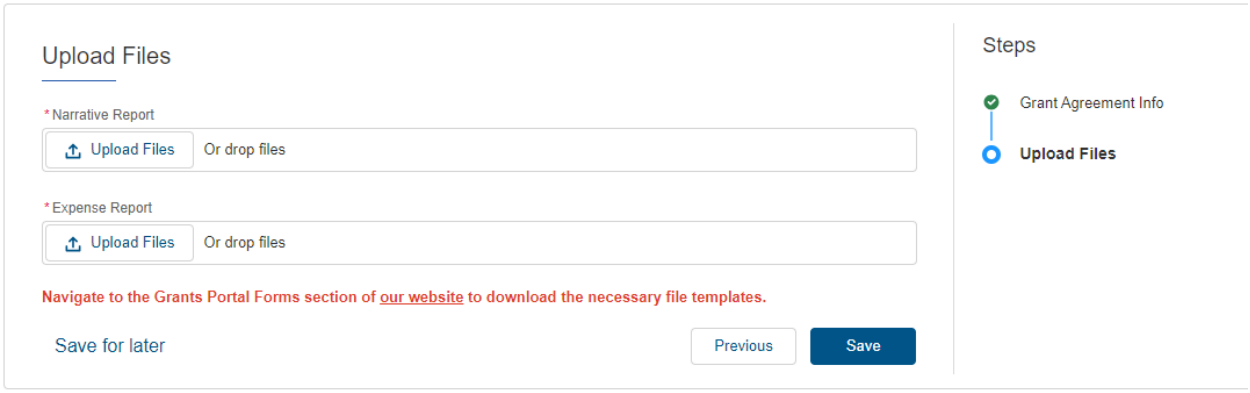
To upload a report, you will need to select your grant agreement from the Grant Agreements tab on your home page. In the upper right-hand corner, you will select, submit a report.



On the next screen you will see a section for grant agreement information. The first step will be prepopulated with information from the grant agreement. Click Next to proceed.



On the next screen you will upload your report documents. If only a narrative report is required, please upload a narrative report in the expense report section. Once you have uploaded your documents, click the save button.



Health Sciences Division staff will contact you if you need to submit amendments to your reports.

Change Order Requests

The following situations require change order requests to be submitted:

- No Cost Extension of End Date - The project timeline is moving slower than anticipated and the grantee needs additional time to complete the work and/or expend all the project funds (a no cost extension of the end date).
- Change of Scope - A change in the scope of the grant agreement has occurred. A change in scope is a meaningful change in activity from what was originally described in the statement of work or workplan contained in the grant agreement. An example of a change in scope may include an activity initially budgeted for that can no longer be completed due to unavoidable circumstances and a request for those funds to be redistributed to a new, entirely different activity.
- Transferring more than 10 percent of the total approved budget between expense (and where applicable functional) categories. (i.e., the categories listed within your budget table on your budget justification)
- You are requesting a new purchase of equipment that is $1,000.00 or more and was not included in the initial grant request.
- Increase or decrease in the cost/grant award amount.
- The grantee encounters circumstances necessitating that it terminates the agreement.

To request a change order, please follow the link below to access the appropriate form. This form will allow you to provide the information required to review your request. Once you have completed the form, a copy of the form will be sent to you via email from AirSlate. You should upload the copy of this form to your change order request.

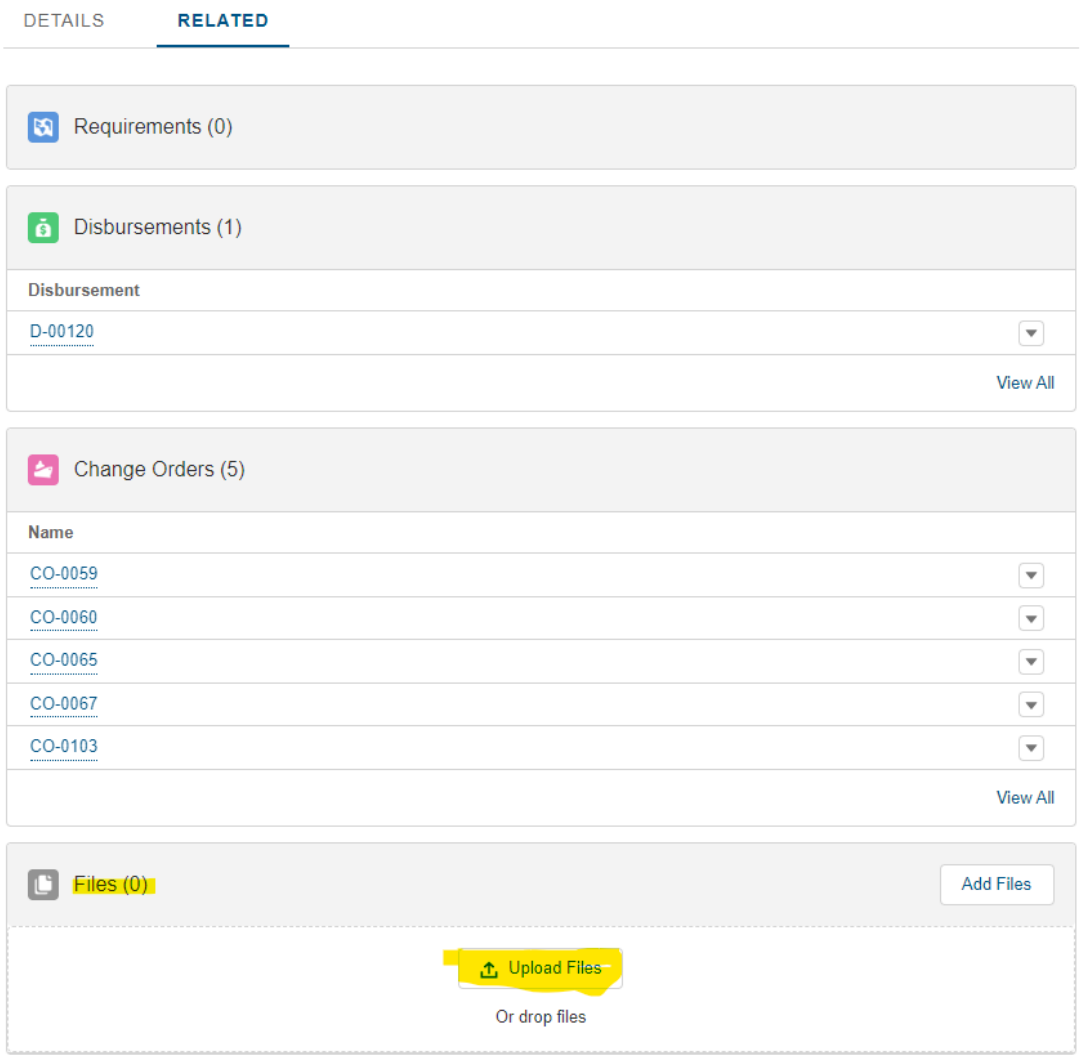
In order to upload a change order request into the grants portal, you must be listed as the applying contact for the funding request. If you are not the applying contact, please contact your applying contact to complete this process in the grants portal.

Change Order Request Form: https://arsl.at/l91Xd64l

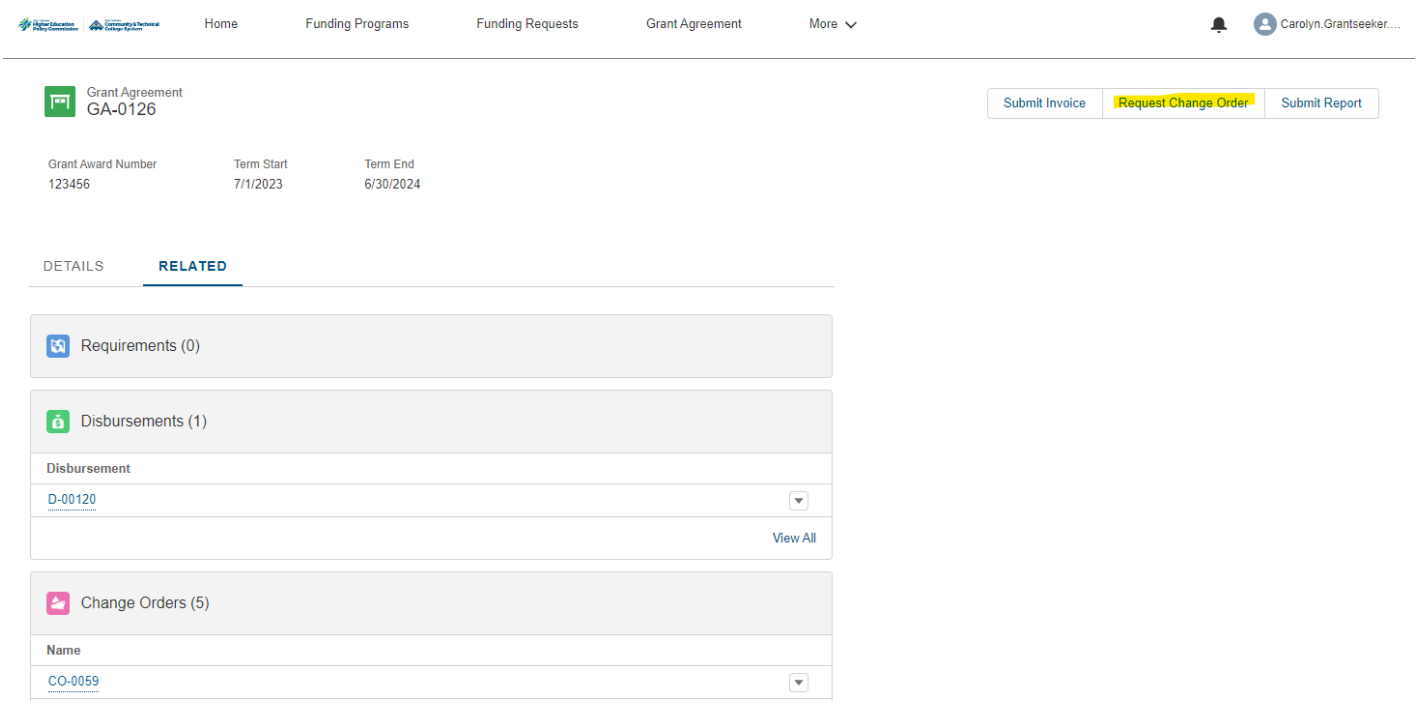
After obtaining the form from AirSlate, you will need to do two things in the portal to complete your request process.

1. Upload your change order request form into the files section of your Grant Agreement:
    a. To upload your file, first access your grant agreement by clicking the Grant Agreement tab at the top of your home page and then clicking on the grant agreement number to access your grant agreement information.

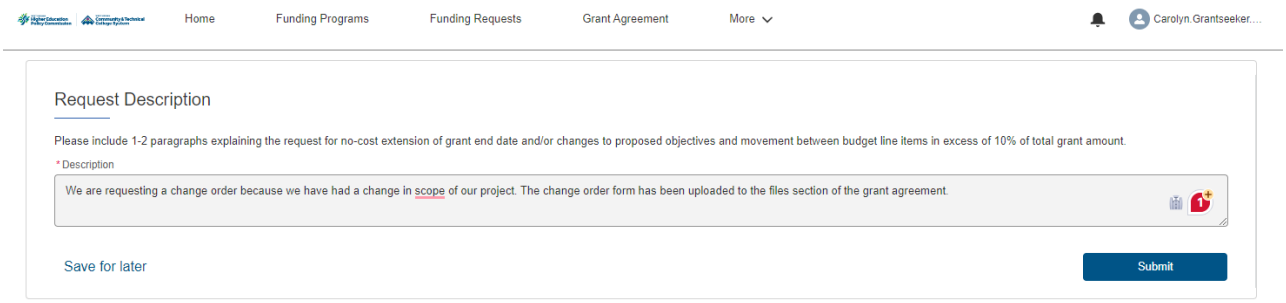
b. Once you have accessed your grant information, click on the related tab, and upload your change order form in the files section.



2. After uploading your change order form into the files section of your grant agreement, then you must click the Request Change Order button in upper right corner of your screen.



a. After clicking the button, a new tab will open in your web browser, and you will be prompted to enter a description of your change order. Please state the broad reason you are requesting a change order and state that the change order form is uploaded in the files section of your grant agreement. Click submit to finish the process.



After completing the change order request, your authorized signatory will be sent a form in SignNow to finalize the change order. Be sure they review and sign the form quickly so the change order can go into effect.

Contact Information

If you have questions about the grant's portal or the content of our grants, please feel free to reach out to us at any time.

- For technical assistance with the grants process (application, invoicing, change orders, etc.), please contact Deloris Vance at Deloris.Vance@wvhepc.edu.
- For programmatic questions about large RHI (Rural Health Initiative) grants and special projects grants, please contact Amanda McCarty at Amanada.Mccarty@wvhepc.edu.
- For programmatic questions about behavioral health grants, please contact Carolyn Canini at Carolyn.Canini@wvhepc.edu or Candace Layne at Candace.Layne@wvhepc.edu
- For programmatic questions about nursing grants, please contact Jordyn Reed at Jordyn.Reed@wvhepc.edu.