## How to Upload Beginning of Year Documents

Beginning of year documents must be uploaded into the GrantVantage system by CDVSA subgrantees, starting with State Fiscal Year 2023. This will provide a timestamp for when documents were submitted and will keep all documents in a central location accessible by CDVSA staff and subgrantees in live time.

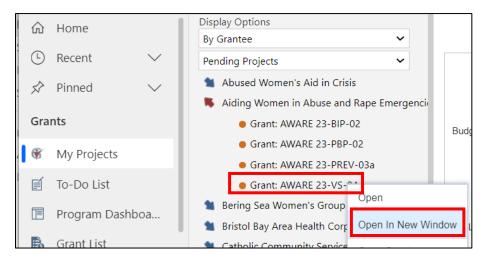
In the menu at the left of your home screen, click on **My Projects** to see a list of your grant awards (NOTE: Project = Grant Award). From this view, under display options, click on the drop down that says "Active Projects" and select instead "**Pending Projects**".

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Your agency's FY23 projects will appear under this view until the award budgets have been approved by CDVSA. Once the budget and all beginning-of-the-year documents are completed and uploaded, the status will change to Active.

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Ť	My Projects		Advocates for Victims of	
eí.	To-Do List		<ul> <li>Grant: AVV 23-PRE</li> <li>Grant: AVV 23-VS-</li> </ul>	
	IO-DO LIST		Grant: AVV 23-VS-	02

Right-click on a pending project you want to open (the award number should begin with "23") and select **Open in New Window**.



In the new window, the project/grant award detail page, single click on the **Related** tab and select **Agreements** from the drop-down menu.

22-DEMO-GV - Saved Grant	
Grant Details Budget Period Grant Users Sub-Projects	Related
☐ Fiscal/Budget Start Date*	Related - Project Management
7/1/2021	Objectives
合 Project Start Date <sup>★</sup>	Budgeting
7/1/2021	Ø Drawdowns & Disbursements
A Current Funding Year	🍒 Assessment
🔀 Year 1	Agreements
	📶 Reports

Make sure you are on the **Pre-Award** tab. Single click on **Upload Document** at the right.

Pre-Award	🐨 Funder 🛛 🗟 Corr	espondence 📝 N	Monitoring 🕞 Pe	erf. Reports	Financial F	Reports & Audits	📝 Editor		Ŷ	UPLOAD E	DOCUMENT
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Grant	-GV - Saved							<b>).00</b> oject Total	Active Grant Status	7/1/20 Project	

In the **Upload Document Window** that opens, enter the following:

- Agreement Start Date is the beginning of the fiscal year (July 1<sup>st</sup> of the current year)
- **Agreement End Date** is the last day of the fiscal year (June 30<sup>th</sup> of next year)
- Single click Choose Files to select the document(s) from your computer to upload

**IMPORTANT NOTE:** To be accepted by CDVSA, documents must be accurately labeled on your computer because once uploaded, you will not be able to change the document's label. Label documents according this this format:

## Subgrantee Acronym\_FYXX\_Name of Document

Example: CDVSA\_FY23\_Grant Award

	Upload Document		e, Anarca Reports & Adults (e) Egitor	🖰 🗵	3
t	Agreement Start Date * 7/1/2022 File *		Agreement End Date * 6/30/2023		te
E arc	Choose File: CDVSA_FY23_Grant Award.docx (only file type .xlsx, .xls, .xml, .csv, .pdf, .doc, .docx, .bmp, .	.gif, .img, .jbg	j, .jpe, .jpeg, .jpg, .png, .ppt, .pptx, .txt are allowed)		] [2
<u>s</u>					2

**HELPFUL NOTE:** Multiple files can be uploaded at one time. Hold the CTRL key to highlight (choose) multiple files from your computer to be uploaded simultaneously.

All Subgrantee Docs > CFRC > FY23 >	ٽ ~
	Correspondence En Monitoring En Peri. Rep
Name	Upload Document
PREV BOY	
2. CFRC VS 2023 CDVSA Authorizing Official (locked)	Agreement Start Date *
3. CFRC FY 2023 CDVSA Current Board Members (locked)	7/1/2022
A. CFRC FY 2023 CDVSA Subgrantee Points of Contact	File *
A. CFRC PREV. 2023 . CDVSA Subgrantee Points of Contact	Choose Files 6 files
5. CFRC FY 2023Required Federal Certifications (locked)	
6. CFRC FY 2023 Civil Rights Certification (locked)	(only file type .xlsx, .xls, .xml, .csv, .pdf, .doc, .docx, .t
8. CFRC PREV. 2023 CDVSA Prevention Award Assurances FY20	023
9. CFRC PREV 2023 CDVSA Prevention Award Conditions FY202	023
CFRC FY 2023 CDVSA Award Assurances (locked)	

Once files are selected (1), click on the disk icon to save (2). Documents upload quickly.

S adpsgrants.crm9.dynamics.com says		
←     □     □     Document is uploaded successfully.       OK	_	
SPHH 23-BIP-06 - Saved Grant		
Grant Details Budget Period Grant Users Sub-Projects Agreements Related		
Pre-Award		
Document Name	E ×	itus
Agreement Start Date * Agreement End Date * 6/30/2023		
1 Choose Files 0. Budget Overview and Narrative (locked).xlsx (only file type .xlsx, .xls, .xml, .csv, .pdf, .doc, .docx, .bmp, .glf, .img, .jbg, .jpg, .jpg, .jpg, .png, .ppt, .pptx, .txt are allowed)		

The following message appears once you have successfully uploaded a new document:

Save 🕐 Refresh	adpsgrants.crm9.dynamics.com says Document is uploaded successfully. ОК	+ \$0.00 Active
Budget Period	Grant Users Sub-Projects Agreements Related	Project Total Grant Status

When done uploading all your beginning of the year documents, correctly labeled, close the Upload Document window by clicking on the  $\mathbf{X}$  in the upper right corner. You should now see your uploaded documents in the Pre-Award Document list.

Pre	-Award Punder Corr	espondence 📝 🛛	Monitoring 📝 Pe	erf. Reports	5 📝 Financial I	Reports & Audits	📝 Editor		PUPLOA	By 22 Reuella Л Nierra 22 Reuella	
	Document Name	Document Owner	Document Date	E- Sign ID	Envelope ID	Envelope Status	Status	Last Status Check	Created On		
3	<u>1. AWARE GF FY22</u> Grant Award.pdf	Reuella Nierra	7/1/2021						3/12/2022 12:46 AM		
1	<u>CDVSA Award</u> Assurances (locked).pdf	Reuella Nierra	7/1/2021						3/23/2022 8:28 PM		
5	<u>EWS 22-VS-08 -</u> 12.DEC MFR.pdf	Reuella Nierra	7/1/2022						4/6/2022 8:02 PM	Reuella Nierra	
	CDVSA FY23 Grant Award.docx	Meggie Stogner	7/1/2022						4/13/2022 8:53 PM	Meggie Stogner	