



Washington Office of Superintendent of
PUBLIC INSTRUCTION



EDUCATION GRANTS MANAGEMENT SYSTEM

EGMS Training for LEA Administrators

Districts, Charter Schools, Tribal Schools

May 3rd, 2022



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Welcome & Introduction

Introduce training instructor and panelists

Training Topics

Training format



Introductions

Training Instructor

- **Ivan Sacoto**, REI Systems, Functional Lead

Training Moderator

- **Vishal Agarwal**, REI Systems, EGMS Project Manager

Panelists

- **Eric Thornburgh**, OSPI EGMS Project Manager
- **Jason Miller**, OSPI EGMS Product Owner/Co-sponsor
- **Amy Harris**, OSPI EGMS Product Owner/Co-sponsor



Things to Note

- LEA EGMS Administrators are the key audience for today's training.
- Today's training is the first of multiple training opportunities for LEAs on the new EGMS to be used by OSPI.
- EGMS Admin for OSPI: Indumathi (Indu) Kandasamy
- For any assistance with the system, please send email to EGMS Support (EGMS.Support@k12.wa.us)
- OSPI has scheduled office hours on May 4th and May 5th to provide dedicated support (answer questions, discuss reported issues, etc.).
- For upcoming office hours and trainings for district administrators or assistance with the pre-application (SAS), please visit:

<https://www.k12.wa.us/policy-funding/grants-grant-management/education-grant-management-system-egms>



Training Topics

Topic	What's Covered?
EGMS Registration and Login	<ul style="list-style-type: none">• LEA admin registration• Logging into the system• Password resets
System Basic Overview	<ul style="list-style-type: none">• Basic navigation concepts• General features
Manage LEA Organization and Users	<ul style="list-style-type: none">• Registering additional LEA users• Adding and deactivating users



Training Format

- All attendees will be muted during the training.
- Questions are welcome!
 - Please use the Q&A feature for questions.
 - The training moderator will monitor questions and request the training instructor or the panelists to answer them at the end of each topic.
 - Answers will also be posted in OSPI website after session is completed.
- This training is being recorded and the recording will be made available by OSPI within few days.



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EGMS Registration and Login

LEA admin registration

Logging into the system

Password resets



LEA User Profiles in EGMS

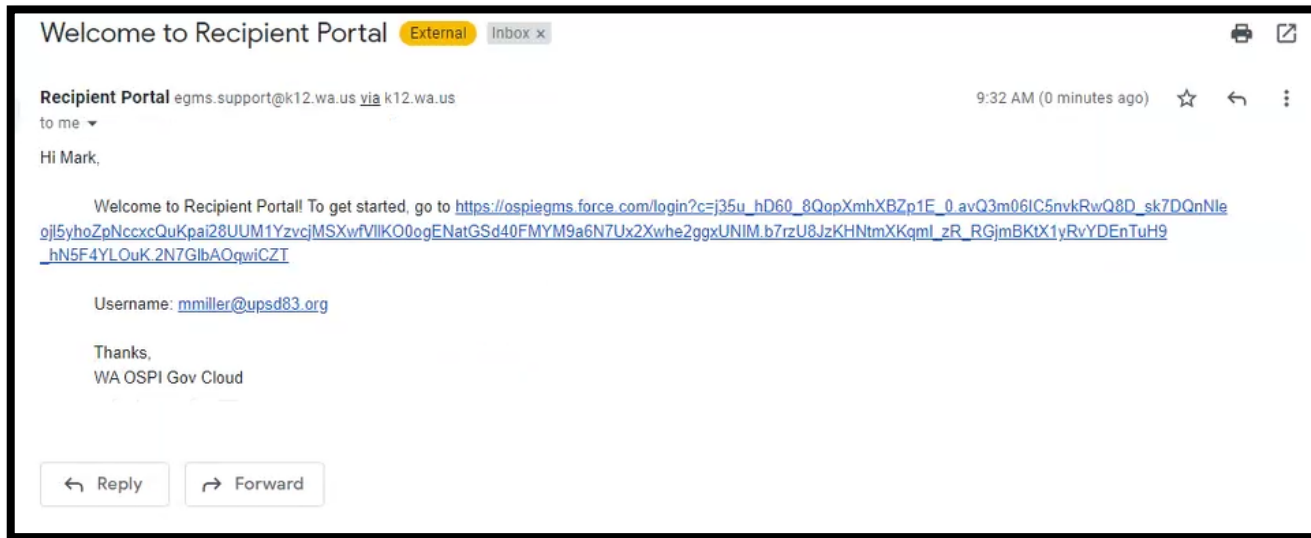
Profile	Description
LEA/District Administrator	<ul style="list-style-type: none">• EGMS admins will be users who are current iGrant District Admin users.• Admins can invite additional users to register as an EGMS user for their organization.• Admins can view and work on business records (e.g., applications, amendment requests, progress reports) within the EGMS.
Primary User	<ul style="list-style-type: none">• Primary users can view and work on business records (e.g., applications, amendment requests, progress reports) within the EGMS.• Primary users have minimum restrictions in the system.• We recommend designating your Fiscal Contact as a 'Primary User'.
Secondary User	<ul style="list-style-type: none">• Secondary users can view and work on business records (e.g., applications, amendment requests, progress reports) within the EGMS.• Secondary users cannot submit post-award amendments and progress reports in the system.
Non-User	<ul style="list-style-type: none">• When creating a contact who need not access the system as a user but may need to be referenced in the application, award, etc., use the "Non-User" option in the 'Contact Type' field.

Refer to 'LEA User Profiles and Permissions' document for complete details.



LEA Admin Registration Email

- By now you (LEA Admin) should have already received the following email from EGMS.



- Please check your spam or junk folder in your email system if you are yet to receive this email.
- If you can't find the email, please contact EGMS support.



EGMS Login

EGMS link: <https://ospiegms.force.com/>

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Username Password
 Remember Me Forgot Password?
LOGIN REGISTER

Welcome to the Education Grants Management System (EGMS), a "one-stop-shop" for the grant process.
To view current opportunities, click on the Opportunities tab below. To apply for an Opportunity, you must be a registered user of EGMS.
If you need to register your Organization, click the Register button.
If you have a Username and Password, log in by clicking the Login button in the upper right corner.

FAQs **Contact Us**

Office of Superintendent of Public Instruction (OSPI)
600 Washington Street SE,
Olympia, WA 98504

OSPI Education Grant Management System (EGMS) Team
EGMS.Support@k12.wa.us



Forgot Password?

Use Forgot Password link

The screenshot shows the login interface for the Education Grants Management System (EGMS). At the top left is the Washington Office of Superintendent of Public Instruction logo. The main content area contains a login form with fields for 'Username' and 'Password', a 'Remember Me' checkbox, and 'LOGIN' and 'REGISTER' buttons. A red box highlights the 'Forgot Password?' link located below the password field. Below the form is a light blue informational banner with the following text: 'Welcome to the Education Grants Management System (EGMS), a "one-stop-shop" for the grant process. To view current opportunities, click on the Opportunities tab below. To apply for an Opportunity, you must be a registered user of EGMS. If you need to register your Organization, click the Register button. If you have a Username and Password, log in by clicking the Login button in the upper right corner.' At the bottom, there are two tabs: 'FAQs' and 'Contact Us'. The 'Contact Us' tab is active, displaying the following information: 'Office of Superintendent of Public Instruction (OSPI), 600 Washington Street SE, Olympia, WA 98504' and 'OSPI Education Grant Management System (EGMS) Team, EGMS.Support@k12.wa.us'. The background of the page features a photograph of children's heads.



Forgot Password?

User clicks on the link received in the email to set up a new password.

Recipient Portal <egms.support@k12.wa.us> Reply Forward Html **Text** Print Delete
 Wednesday, April 06, 2022 7:31:47 PM

Hi Bethel,

Your password has been reset for Recipient Portal. Go to:

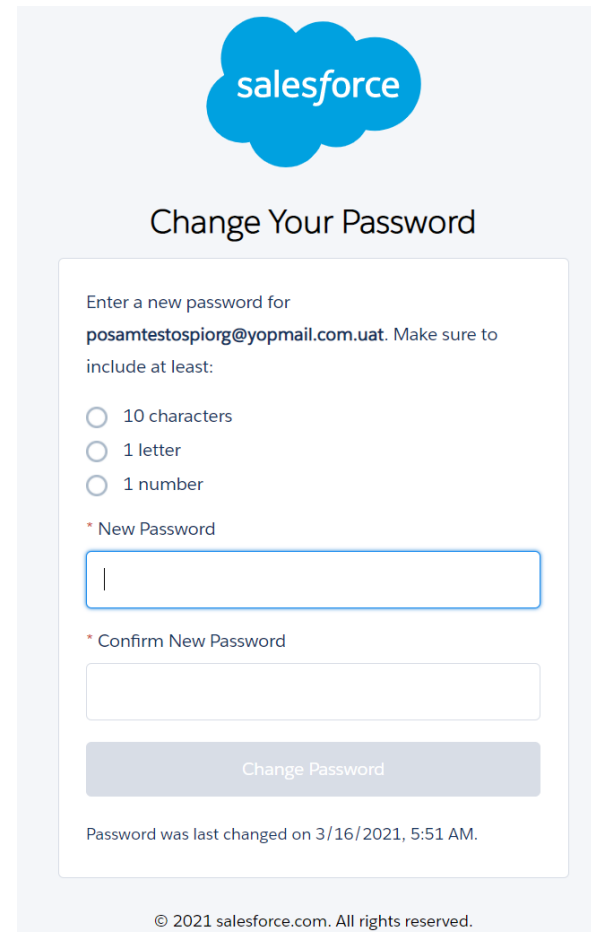
[https://uat-granteeportal.cs32.force.com/_nc_external/identity/ui/login/ForgotPasswordInterstitial?
r=00Dr00000009Eyv005r0000005ldnbCjwKMwoPMDBEcjAwMDAwMDA5RX12Eg8wMkd0MDAwMDAwMGdXTzYaDzAwNXIwMDAwMDA1bGRuYhj-
peCJgDASEP3dyHmHjJCJFqmqp5jTveQaDIwVvmehGyNm1B1T1iiI55yX-kxgNmCb3J2WOAZqWi44Ppt19K40JeqJ9t0dZwbQMqWkplFQtmuV7Mce1dwsJ90osgUA88u3p&display=page&fpot=2cb4d4ea-c40e-
416d-ba72-90637ae02c97f20f41cc-68a9-4837-9414-1effc770f946](https://uat-granteeportal.cs32.force.com/_nc_external/identity/ui/login/ForgotPasswordInterstitial?r=00Dr00000009Eyv005r0000005ldnbCjwKMwoPMDBEcjAwMDAwMDA5RX12Eg8wMkd0MDAwMDAwMGdXTzYaDzAwNXIwMDAwMDA1bGRuYhj-peCJgDASEP3dyHmHjJCJFqmqp5jTveQaDIwVvmehGyNm1B1T1iiI55yX-kxgNmCb3J2WOAZqWi44Ppt19K40JeqJ9t0dZwbQMqWkplFQtmuV7Mce1dwsJ90osgUA88u3p&display=page&fpot=2cb4d4ea-c40e-416d-ba72-90637ae02c97f20f41cc-68a9-4837-9414-1effc770f946)

Thanks,
WA OSPI Gov Cloud - UAT



Forgot Password?

Provide the new password



The image shows a screenshot of the Salesforce 'Change Your Password' interface. At the top is the Salesforce logo. Below it is the title 'Change Your Password'. The main content area contains the following elements:

- Text: 'Enter a new password for **posamtestospiorg@yopmail.com.uat**. Make sure to include at least:'
- Three radio button options:
 - 10 characters
 - 1 letter
 - 1 number
- Text: '* New Password' followed by an empty text input field.
- Text: '* Confirm New Password' followed by an empty text input field.
- A grey button labeled 'Change Password'.
- Text: 'Password was last changed on 3/16/2021, 5:51 AM.'

At the bottom of the form, there is a copyright notice: '© 2021 salesforce.com. All rights reserved.'



Locked Out of EGMS?

- The system will lockout a user after five successive invalid login attempts. The user must wait at least 15 minutes before trying to login again.
- Still not able to login? Send email to EGMS.Support@k12.wa.us with a request to unlock the account.
- You must provide your EGMS username to EGMS Support to request account unlocking.



Session Timeout

- The system will automatically logout a user in the absence of any activity (e.g., typing, clicking) from the user continuously for 2 hrs.
 - The system does not save any unsaved data automatically.
 - Users must save data in the EGMS every few minutes to avoid loss of data.
- The system will show a warning message to the user an hour before terminating the session.

The screenshot displays the Education Grants Management System (EGMS) interface. At the top, the header reads "Education Grants Management System" with navigation links for Planning, Announcements, Applications, Grants, and Monitoring. A search icon is visible on the left sidebar. The main content area is divided into three columns: "Task Summary By Phase", "Task Summary By Due Date", and "My Feed".

Phase	Count
Home	0
Planning	0
Announcements	0
Applications	0
Grants	0
Monitoring	0

Due Date Category	Count
Late	0
Due within 7 Days	0
Due within 30 Days	0
Due in more than 30 Days	0

My Feed
No feeds available.

Session Expiration Warning

Because you have been inactive, your session is about to expire.
Time remaining: 36m:39s

[Stay Logged In](#) [Log Out Now](#)

My Workspace

Calendar | Messages | Notes | Files

Today | April 2022



Updating User Profile

Go to 'My Profile' to update phone and address. To update name, email, and role (Primary or Secondary), contact EGMS Support at: EGMS.Support@k12.wa.us

Education Grants Management System

Grants Portal

Opportunities Applications Grants Monitoring

Adna AAENSON

Edit

Profile Information Attachments

User Information

First Name Adna	Last Name AAENSON	User Role Primary
Accessibility Mode <input type="checkbox"/>		

Contact Information

Email adnaggg@yopmail.com	Phone (789) 654-4568	Address Line 1 Adna null
Address Line 2	City Adna	State/Province Adna
Zip Code 47857	Country USA	

Edit

Adna AAENSON

My Profile

Logout

Adna AAENSON

Contact
adnaggg@yopmail.com

Contribution

2 Posts & Comments	0 Comments Received	0 Likes Received
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Updating Programs of Interest

Under **Organization Profile** → **Contacts**:

For any user, LEA admin can select one or more grant programs in the “Programs of Interest” section to receive notifications from EGMS for the formula opportunities that OSPI has published in the system for the selected grant programs.

The screenshot displays the Education Grants Management System interface. The left sidebar contains navigation options: Search, Tasks, My Tasks, Activities, Organization (highlighted), Recently Viewed, and Technical Support. The Organization section is expanded to show the Organization Profile, which includes a list of contacts. The 'Contacts' section is highlighted with a red box. The main content area shows the profile for Adna AAENSON, including contact information and an 'Associate' button (highlighted with a red box). Below this is the 'Programs of Interest' section, which contains a table with columns for EGMS ID, Program Name, and Type. The table currently shows 'No Records Found'.

EGMS ID	Program Name	Type
No Records Found		



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EGMS Basic Overview

Basic navigation concepts and general features in
EGMS



Basic Navigation Concepts and General Features

- Attendees are welcome to login to the EGMS at this point and follow along with the trainer on the system navigation concepts – to be covered next.
- Reminder – OSPI will schedule office hours to review navigation concepts and system features at a slower pace for users who require additional assistance.



Basic Navigation Concepts and General Features

- Navigating the EGMS menu (context-driven menus, expanding/collapsing menus and more)
- Home tab (Task Summary, My Feed, Calendar, Messages, Notes, Files)
- Accessing system records
 - Tasks
 - Global Search
 - Recently Viewed
- Data Refresh (page-level, section-level)
- Download data in Excel (.xls) and PDF format
- Basic components of a record in EGMS (Overview, Collab, Files, History, etc.)

Refer to Chapter 3 of the user guide for additional details on the common features in EGMS.



Basic Navigation Concepts and General Features

- Adding data in grids
 - Scrolling to the right to view available actions
 - Sorting
 - Filtering
 - Saving data
 - Hamburger menu
 - In-line edits Vs modal (or pop-up) windows
 - Saving data and closing modal windows
- Taking page-level actions
 - Actions buttons in the upper right corner.
 - Switching between View and Edit modes.
 - Forms Vs. regular pages
 - Editing and Validating a form
 - Hamburger menu



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Manage LEA Organization and Users

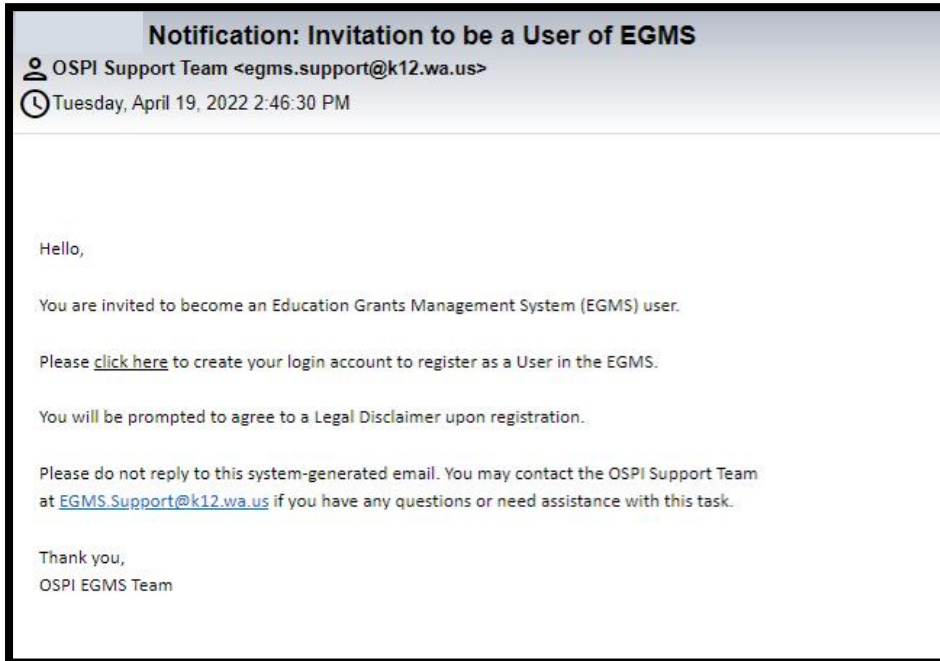
Registering additional LEA users

Adding and deactivating users

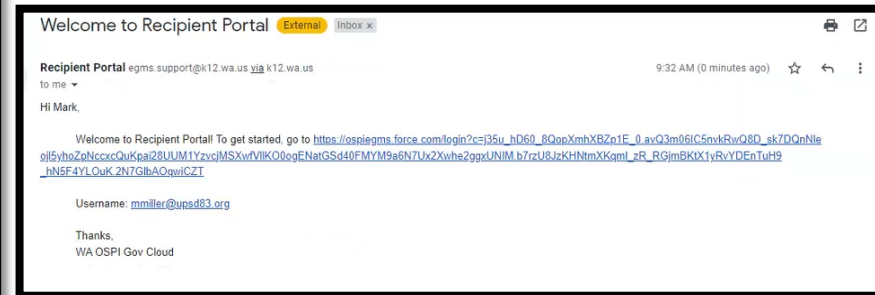


Inviting Additional Users to Register

- No limits on the number of LEA contacts that an LEA admin can add in EGMS
- Only an LEA administrator can invite contacts added in EGMS to register as EGMS users.



Registration Invitation Email



Password Setup Email

Refer to Chapter-6 of the EGMS User Guide for detailed steps.



Helping Users Access EGMS

Before you contact EGMS administrator for help:

- Double-check the email ID you used to invite users for registration.
- Ask users to check their spam or junk mail.



User Limits

- OSPI has established the maximum number of users your organization can register in EGMS. This limit includes LEA administrator and LEA business users (program and fiscal staff).
- To request additional user limit for your organization, please contact EGMS Support.

The screenshot displays the EGMS interface for the Adna School District organization profile. The left sidebar contains navigation options such as Search, Tasks, Activities, Organization (highlighted), and Recently Viewed. The main content area shows the organization details, including address, state, zip code, and organization type. A red box highlights the 'Maximum Users Allowed' field, which is set to 3. Below the details is a table of additional addresses and a contacts section.

Address Type	Address Line 1	City	State	Zip Code	Actions
Primary Address	PO BOX 118	ADNA	WA	98522	
Project Location	179 DIECKMAN RD	ADNA	WA	98522	



Deactivating a User Account

- Deactivating a user account frees up the user limit for your organization in the EGMS!
- Contact **EGMS Support** to deactivate an LEA user account.
- Consider deactivating user accounts in the following scenarios before registering the replacement staff in EGMS:
 - User is not working with the LEA.
 - User is on extended leave, and you need to register the backup user.



Changing LEA Administrator

- The LEA administrator can select another LEA user registered in EGMS as the new administrator.
- If the LEA administrator is out of office, please contact **EGMS Support** to update the administrator.
 - Send the organization name, new LEA administrator's first name, last name, and email.
- Only one LEA user registered in EGMS can be assigned as the LEA administrator at any given time.



Changing LEA Administrator

Washington Office of Superintendent of PUBLIC INSTRUCTION Education Grants Management System Grants Portal

Opportunities Applications Grants Monitoring

Search

Subrecipient Organization: **Bremerton School District** Cancel Save

Org Code: 18100 Status: Active EIN: NULL UEI: GMLVTEPLWH16

Overview Collab Assurances Files

Details

EIN: NULL	DUNS: 55697239	*Address Line 1: 134 MARION AVE N
*Address Line 2:	*City: BREMERTON	*State: Washington
Zip Code: 98312	County: NULL	*Phone: NULL
Organization Type: School District	SAM.Gov Expiration Date:	Statewide Vendor ID: SWV0012951-00
Organization Code: 18100	Maximum Users Allowed: 20	Organization DBA: Bremerton School District

Administrator:

Additional Addresses

Address Type	Address Line 1	City	State	Zip Code	Actions
Project Location	134 MARION AVE N	BREMERTON	WA	98312	
Primary Address	134 MARION AVE N	BREMERTON	WA	98312	

Total Records: 2



Reminders

- **Office Hours:** May 4th and May 5th
- **Next Training** is on May 10th for LEA staff who will work in the new EGMS on consolidated grants and consortiums. Attendees will receive an overview of the EGMS and learn how to navigate the system.
- **Next Step for LEA Admins** – Please invite your LEA staff to register in EGMS before the May 10th training.
- **Registration Link for May 10th Training:**

https://us02web.zoom.us/webinar/register/WN_VlsssY-BSEmEI8YUbceykg