Grants System User's Guide:
Grant Applicants and Recipients

v.20250107.4.v2

# Table of Contents

# Introduction

This guide is intended for Grants System Users who wish to apply for any grant, or subsequently manage an active grant project, from a grant program offered by the Public Service Commission (PSC) of Wisconsin. This guide will walk Grants System Users through all steps in the grant application and grant project management process in the online PSC Grants System. Consider keeping this guide in a handy place to reference as while working with the system through different aspects of the grant process.

# Getting Started

PSC Grants System users must also have an account on the PSC's Electronic Records Filing system (ERF) to access the PSC Grants System.

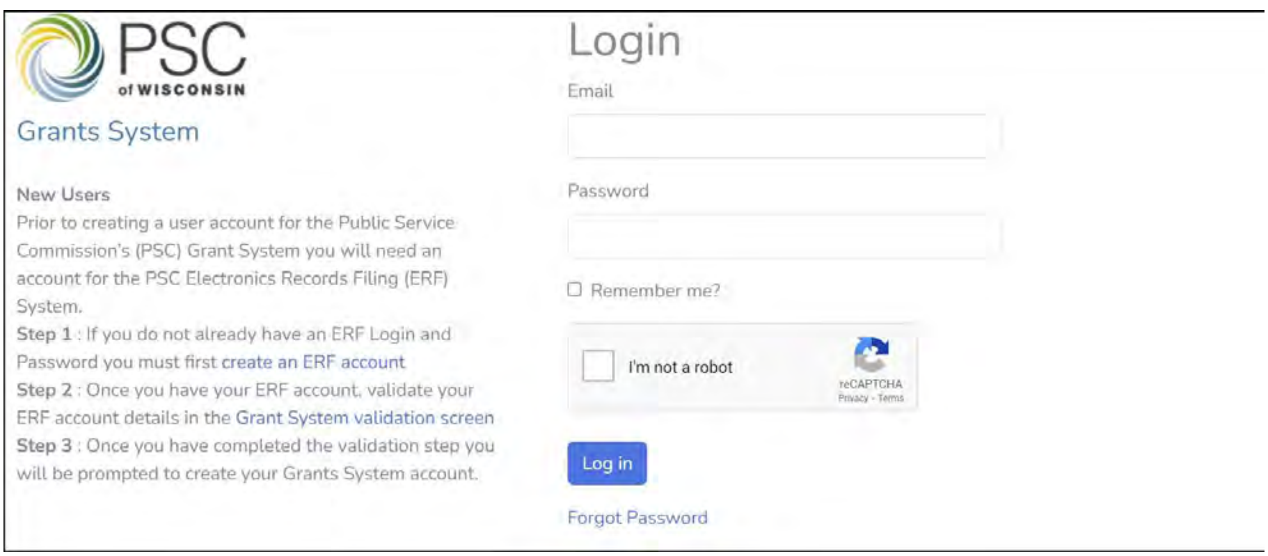
Use the link in Step 1 to log in and get started if the account is already set up and the log in is established.

New users must create and validate an ERF account if one does not already exist. The PSC Grants System login page has links so both tasks can be completed.

### Step 1 – Login Page

To create an account in the PSC Grants System, enter the following URL in a web browser:

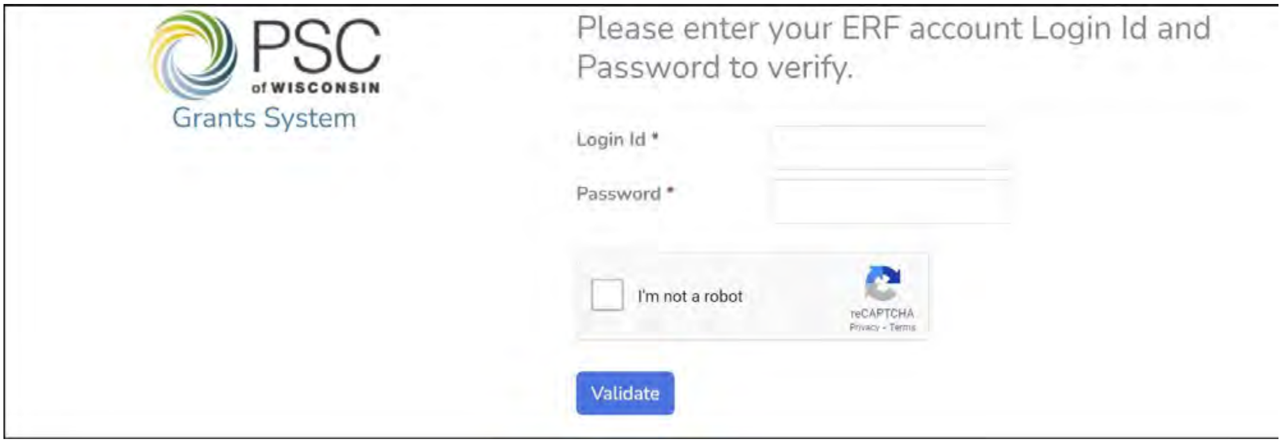
URL: https://apps.psc.wi.gov/apps/grants




- If an ERF account exists, log in to access available grants.
- If an ERF account needs to be created, follow the link to create an ERF Account, then return to the login page and follow step 2 to validate your ERF Account.

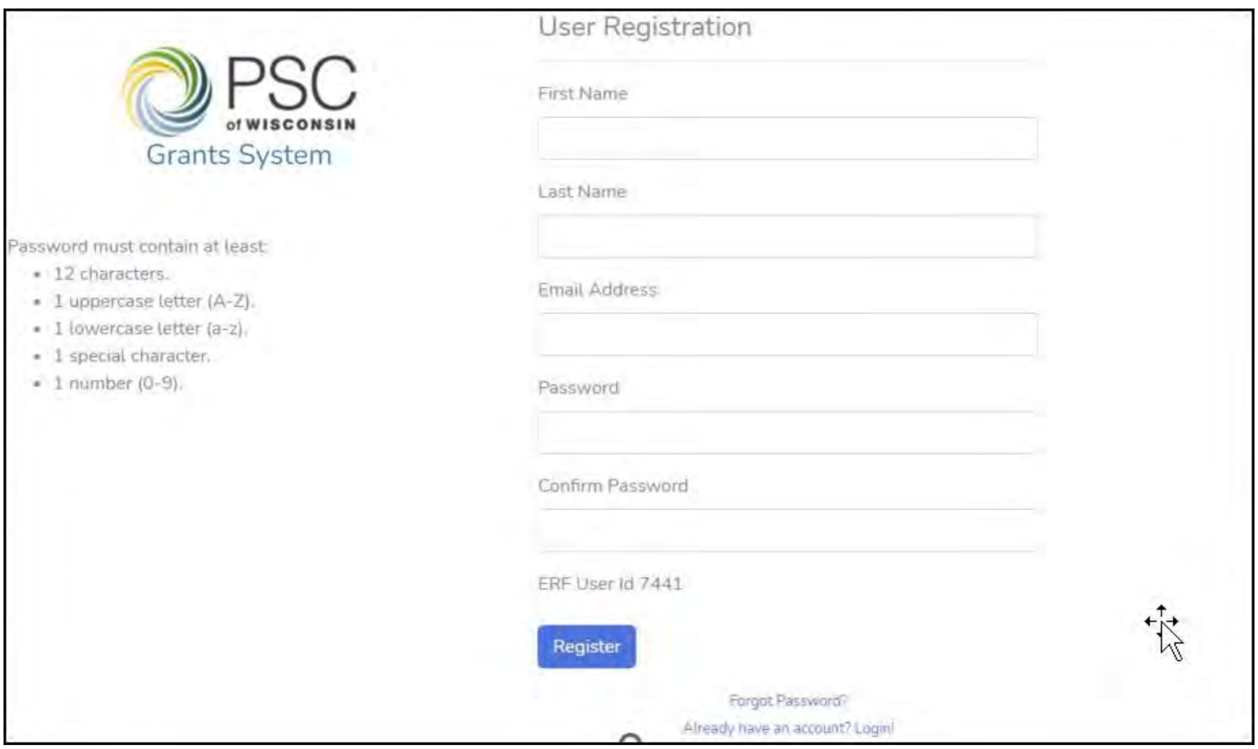
## Step 2 – Validate your ERF account.

Enter an ERF Login Id, the ERF Password, and click ‘Validate’.



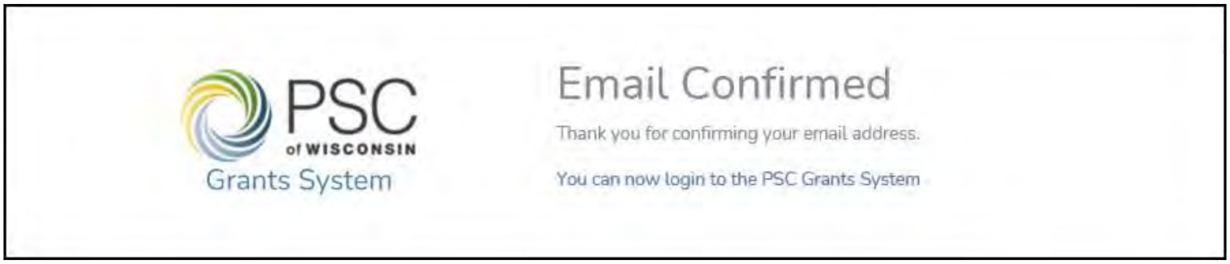

## Step 3 – Create PSC Grants System User Account and Login to the system.

Once the ERF account has been validated, register as a new user in the PSC Grants System.




- Click ‘Register’. You will be asked to verify your email to complete your registration.
- Check your email to get the confirmation link and click on the link in the email to complete your registration.

A confirmation email will be sent to the email address entered and the next step is to click the 'You can now login to the PSC Grants System' link to begin using the PSC Grants System.

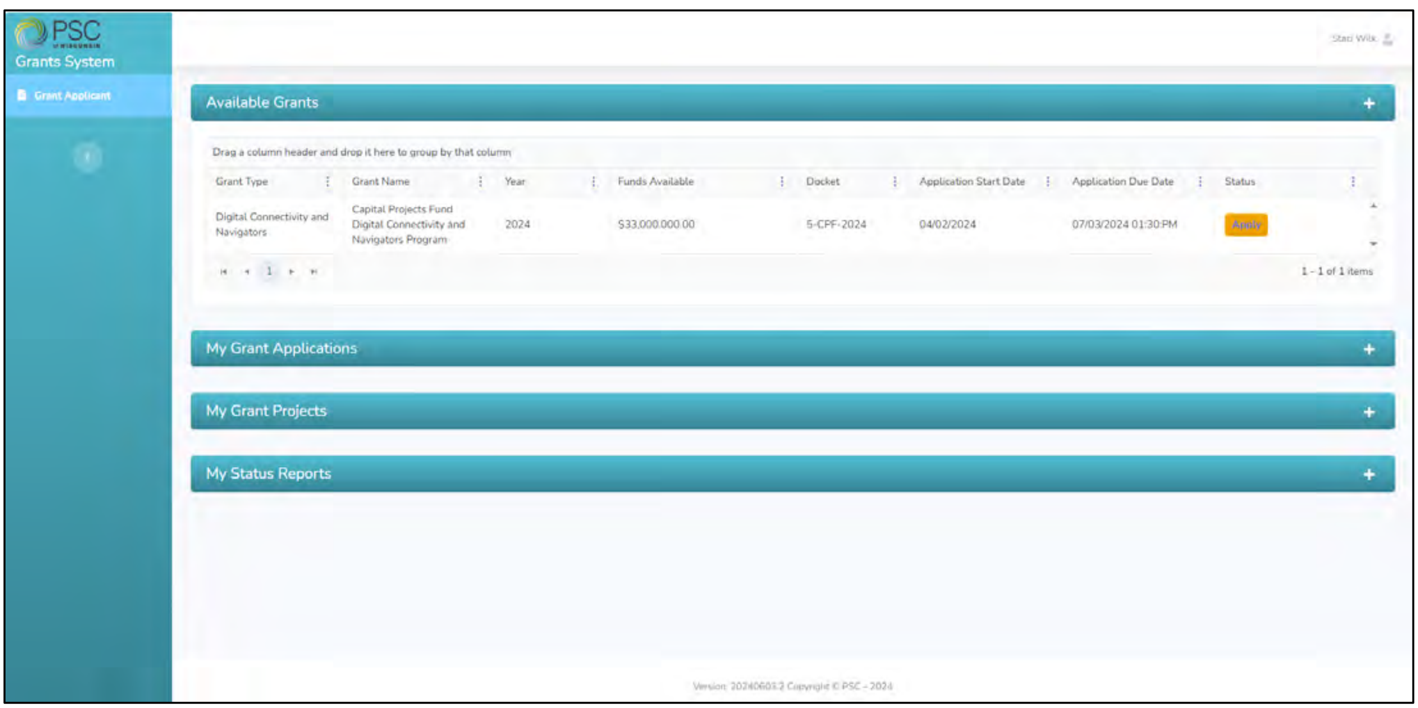



## PSC Grant Application Submission Expectations

All grant applications have a due date and time associated with the submission. This will require a grant applicant to submit an application by a date and time specified to accept the submission. The Grants System will accept applications submitted through the final minute identified, but please be aware that the time used will be according to the PSC server time, not an applicant's personal computer. Grant applicants are encouraged to submit applications before the specified due date and time to avoid any potential issues with submission.  Applications submitted after the specified date and time of submission for the grant will be rejected.

# Grant Applicant Landing Page

Log into the PSC Grants System and the available grant programs currently accepting applications will be listed under the Available Grants section. Choose the grant to apply for and click the 'Apply' button to begin a grant application.

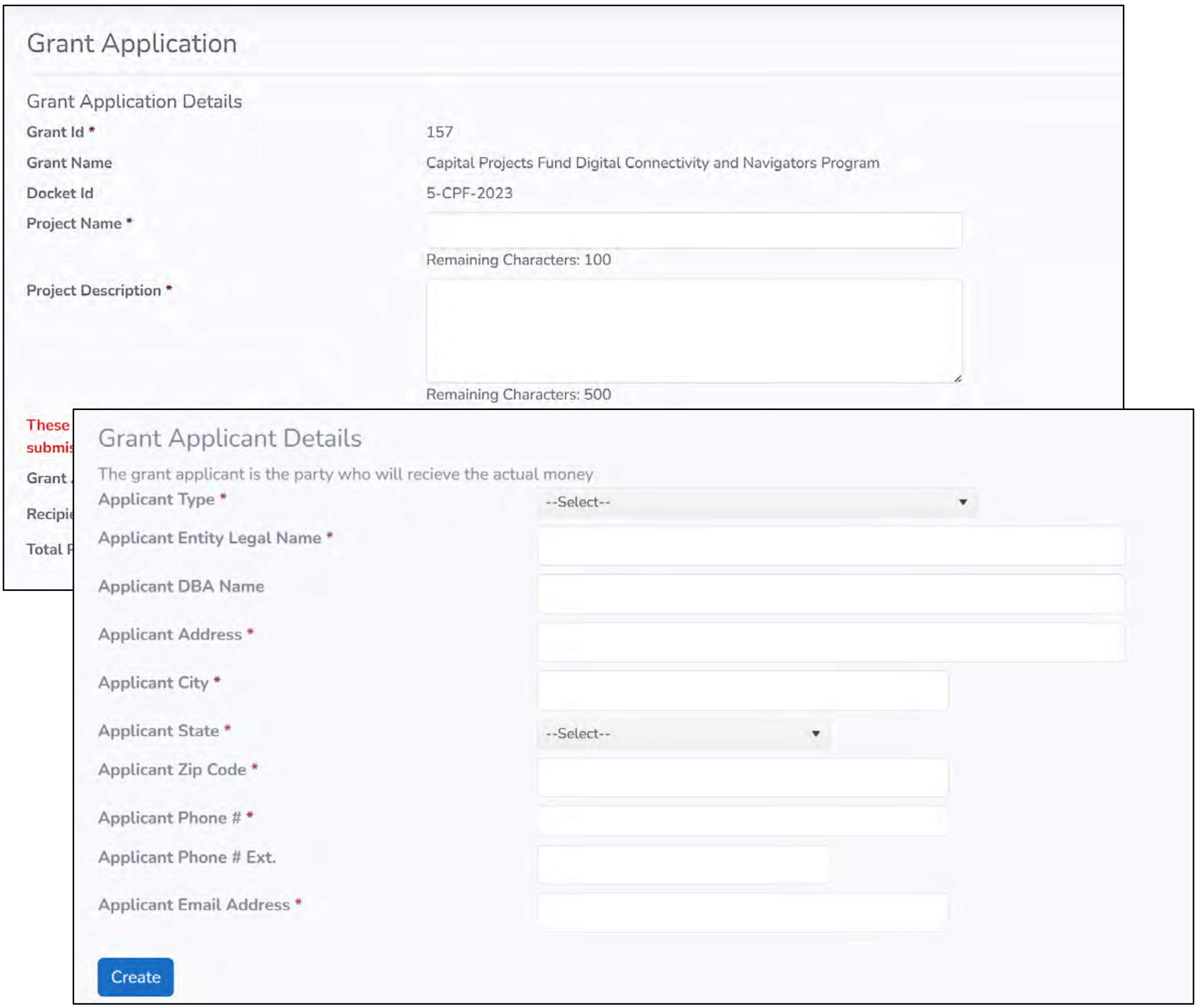


# Grant Application Details tab

On the first tab, fill out both sections of the ‘Grant Applicant Details’. Once both sections have been completed, click on the ‘Create’ button at the bottom of the page to continue through the Grant application.

**NOTE**: The Applicant Entity Legal Name **must** be the entity that will sign the grant agreement, submit reimbursement requests, and receive grant disbursements.

Fields with a red asterisk are required fields. Grant Amount Requested, Recipient & Partner Contributions (if applicable), and Total Project Cost are not required until the time of submission, where these values will be expected to match the subtotals on the Budget tab.



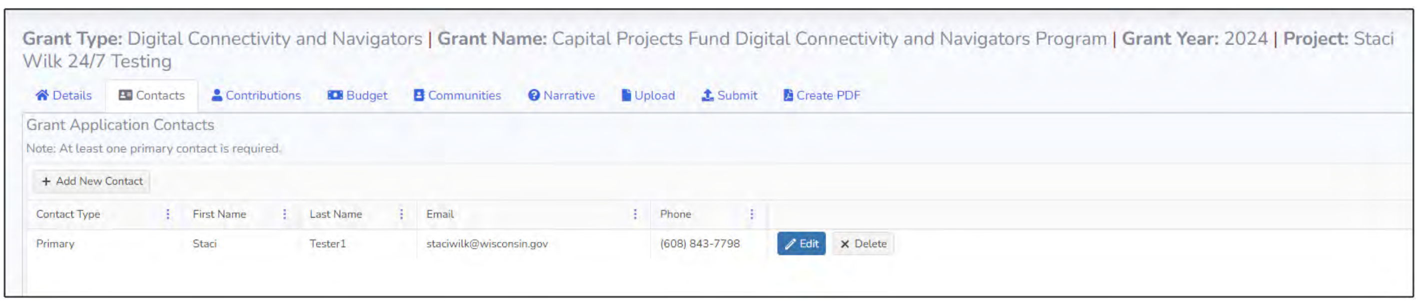
# Additional Grant Application Tabs

Once the information on the Details Tab is saved, additional tabs will appear on the screen. Click on each tab to enter the information requested to complete your grant application.

**NOTE**: Not every grant program will include all tabs below, a good example is the Communities tab. If this is not included in the grant program being considered, it may not show. Please refer to the grant application instructions or contact the appropriate PSC staff for questions regarding the application process.


## Contacts Tab

On the Contacts tab, enter all contacts related to the application. Click ‘Add New Contact’ to enter a contact. At least one Primary contact must be designated and one Authorized Representative, which may or may not be the same person.



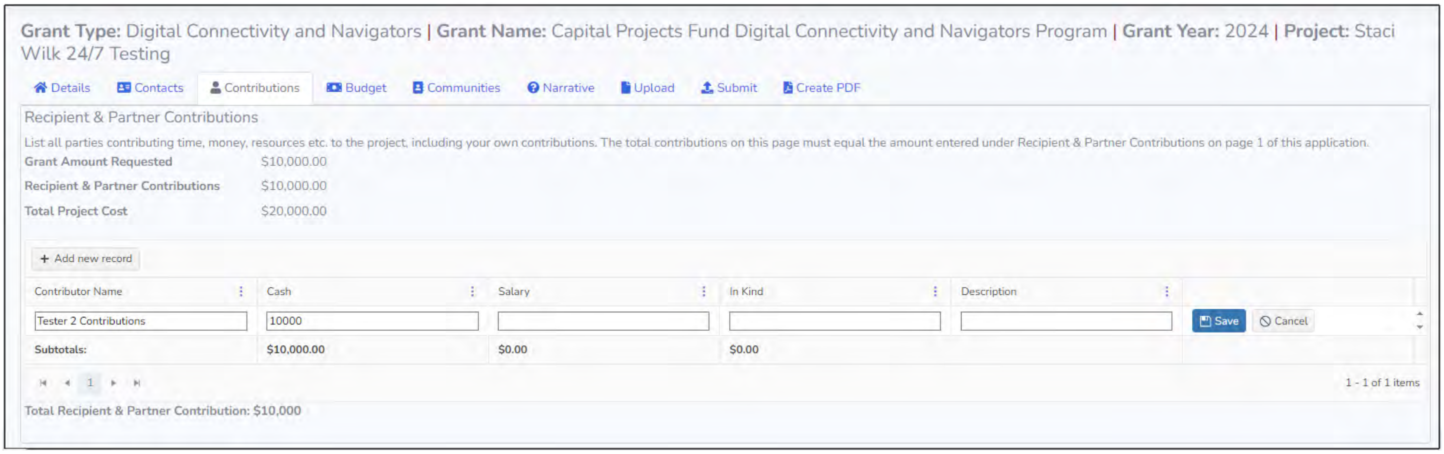

Contact Types to add include:

- **Authorized Representative:** the person legally authorized to represent the organization when signing the grant agreement/contract with the PSC.
- **Primary:** The Grant Recipient’s employee responsible for the administration of the Grant Agreement. This person should represent the Grant Recipient’s interest regarding Agreement performance, financial records, and related considerations.
  **Secondary:** If applicable, a backup contact for PSC staff to contact.
- **Financial Manager:** If applicable, the person who will send reimbursement requests and who the PSC should contact about those requests. If none is entered, the Primary contact will be used by PSC staff.
- **Grants Manager:** If applicable, the person responsible for managing the grant project and submitting progress status reports. If none is entered, the Primary contact will be used by PSC staff.
- **Contractor/Consultant:** If a third-party consultant assisted in the preparation of your application or is otherwise closely involved in the day-to-day management of your grant project, enter their contact information.

## Contributions Tab

Contributions, often referred to as "match," throughout the system is important to understanding the full scope of a project. It is discussed on multiple tabs:

- Details Tab: Subtotal of Applicant + Contributor portion of overall project budget.
- Contributions Tab: Summary of contributions organized by Contributor Name and categorized by Cash, Salary or In Kind, which refers to what will be contributed.
- Budget Tab: Details on overall budget which includes a subtotal of the grant funds + match.




**NOTE:** All In Kind contributions, which are contributions similar to, but different than money, require a description to denote what that contribution will be.

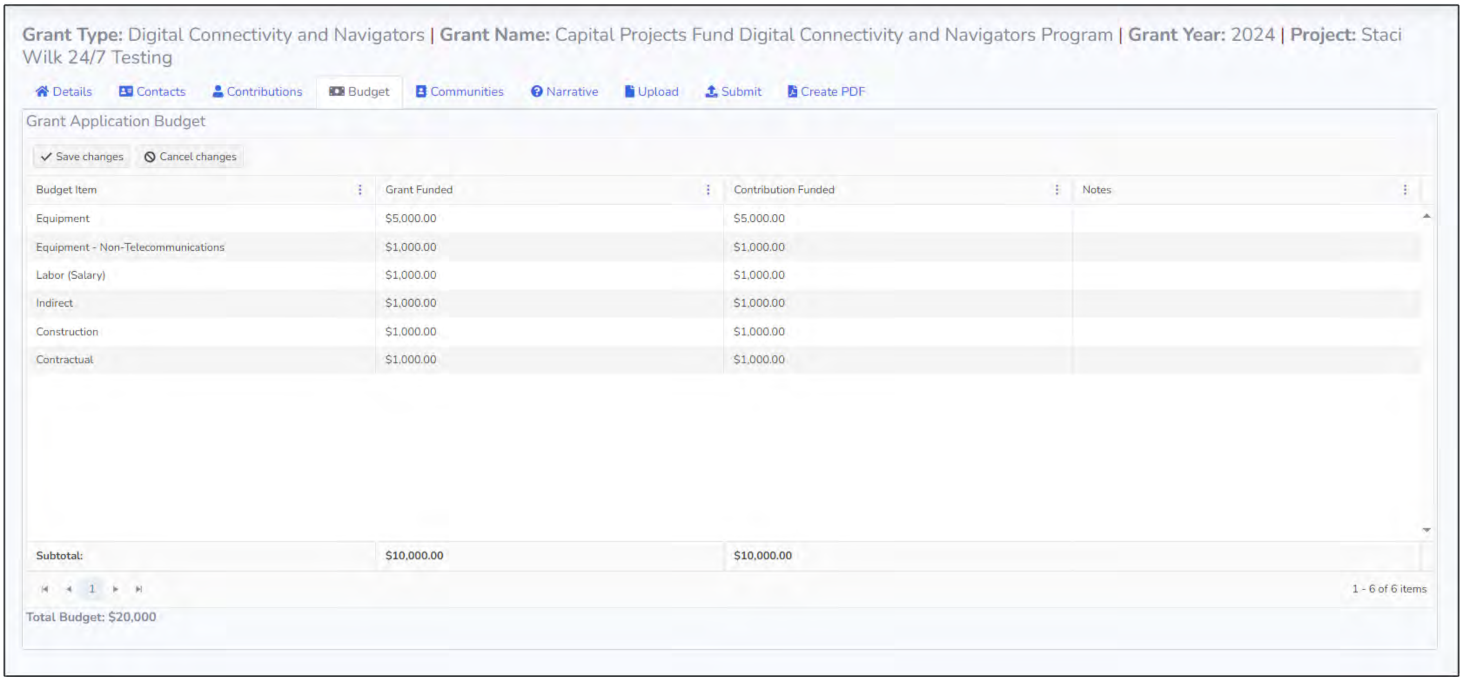
**Validation Step**

1. If the subtotal for Recipient & Contributions on the Budget tab does not match the subtotal on the Recipient & Contributions tab, the system will display a warning. An application cannot be submitted until the values match across the tabs.
2. If the total value on the Recipient & Contributions tab does not match the Recipient & Contributions amount entered on the Grant Details tab, the system will display a warning. Work can continue with other parts of the application with these numbers not matching; however, the amounts must match to successfully submit the application.

## Budget Tab

For each Budget Item, enter the amount that will be covered by grant funds as well as the amount that will be covered by contributed ("match") funds. All costs entered on the budget should be considered allowable, allocable, and reasonable. All fields require an entry. Enter zero if there are no costs for the field.

**Note**: Be sure to click 'Save Changes' at the top before navigating away from this page or information will not save.


**Grant Type:** Digital Connectivity and Navigators | **Grant Name:** Capital Projects Fund Digital Connectivity and Navigators Program | **Grant Year:** 2024 | **Project:** Staci Wilk 24/7 Testing

Details Contacts Contributions Budget Communities Narrative Upload Submit Create PDF

Grant Application Budget

Save changes Cancel changes

| Budget Item | Grant Funded | Contribution Funded | Notes |
|---|---|---|---|
| Equipment | $5,000.00 | $5,000.00 | |
| Equipment - Non-Telecommunications | $1,000.00 | $1,000.00 | |
| Labor (Salary) | $1,000.00 | $1,000.00 | |
| Indirect | $1,000.00 | $1,000.00 | |
| Construction | $1,000.00 | $1,000.00 | |
| Contractual | $1,000.00 | $1,000.00 | |
| Subtotal: | $10,000.00 | $10,000.00 | |

1 - 6 of 6 items

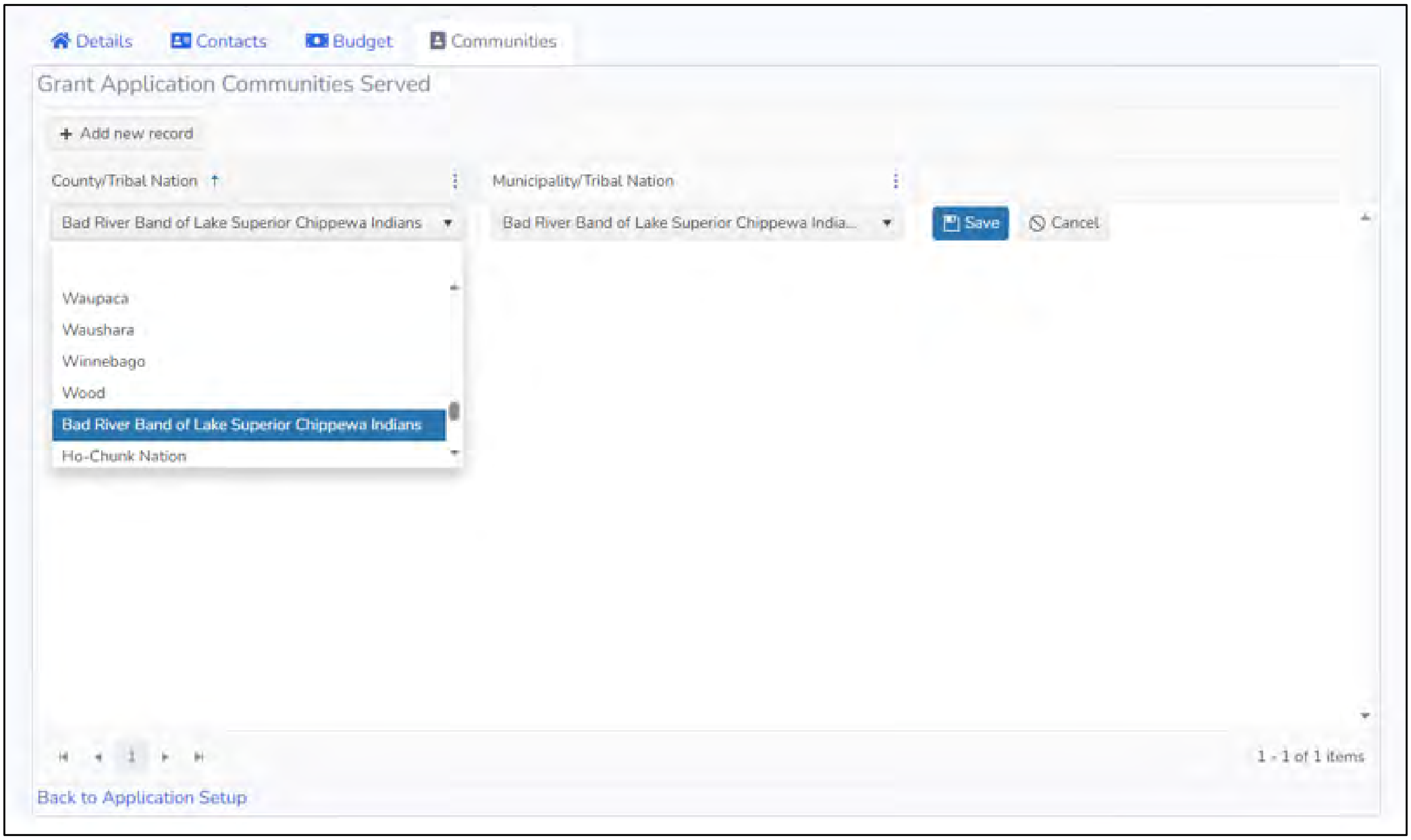
Total Budget: $20,000

**Validation steps**

1. If the subtotals on the Budget tab do not match the Contributions tab total and the Grant Amount entered on the Grant Details tab, the system will display a warning. An application cannot be submitted until the values match.
2. If the subtotal for Contributions added to the Budget tab does not match the subtotal on the Contributions tab, the system will provide a warning. An application cannot be submitted until the values match.

## Communities Tab

If identification of the communities that will be served is required in the grant application instructions, enter each County/Tribal Nation and the Municipality/Tribal Nation by adding a new record on the communities tab. Both fields are required. In some cases, this tab is not applicable to the grant.




Multiple Counties and Municipalities or Tribal Nations and Tribes can be added if that is applicable.

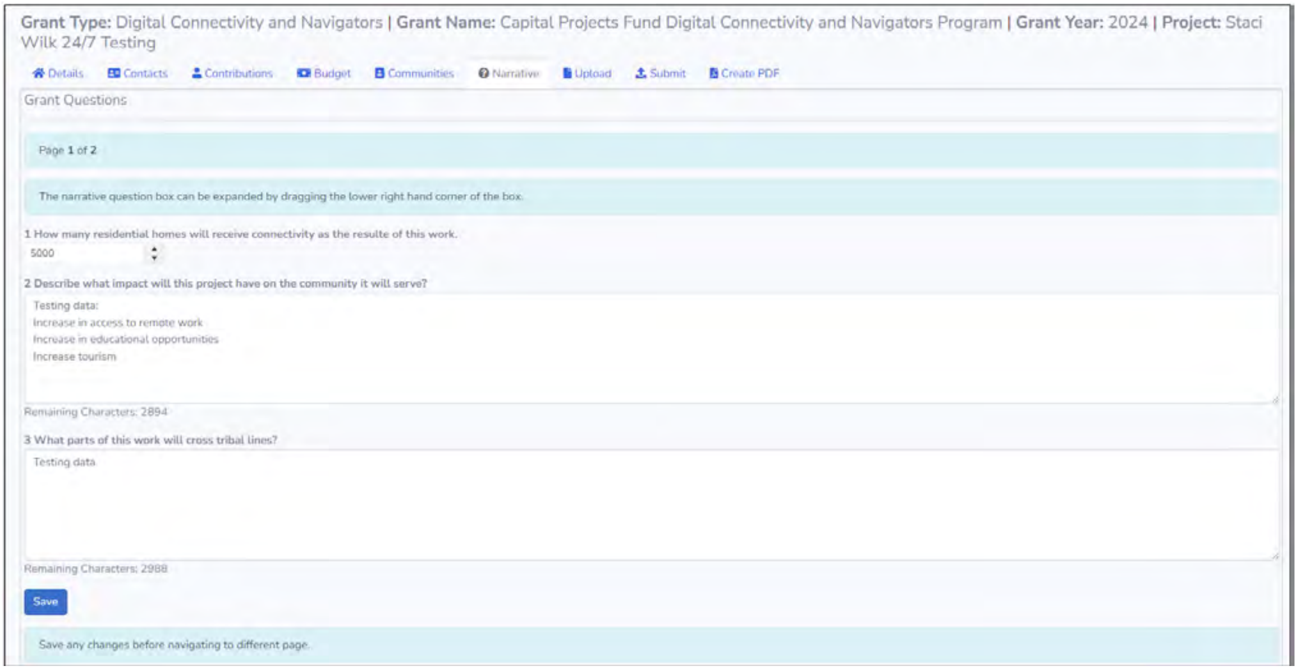
**Countywide projects**: If your project proposes to serve the entire county, select the county in both the 'County' dropdown and the 'Municipality' dropdown menus.

**Statewide projects:** If your project proposes to serve the entire state, choose 'Statewide' in both the 'County' dropdown and the 'Municipality' dropdown menus.

Select the 'Save' button to save changes on the Communities Tab.

## Narrative Tab

The Narrative Tab includes multiple questions on the project work proposed as a part of the application process. This section can consist of multiple pages of questions. Be sure to click the 'Save' button before navigating away from the bank of questions showing on the screen or to another the tab in the application so that work in progress will not be lost.




**Validation Step**

1. All questions require an answer before an application can be submitted.
2. Refer to the grant application instructions of the grant program for direction on any questions, including whether a particular question may apply. At a minimum, the system will require some entry, e.g. "N/A," before clicking the 'Save' button.

## Upload Tab

The Upload tab can be used to add any documents as required by the grant application instructions for the grant program to which you are applying. Once the application is submitted, uploaded documents are published on the PSC's ERF system which is available to the public.

Upload requirements:

- Only .pdf and .xlsx file extensions are allowed
- Maximum file size for any single file is 4MB
- A maximum of 10 files can be uploaded per grant application

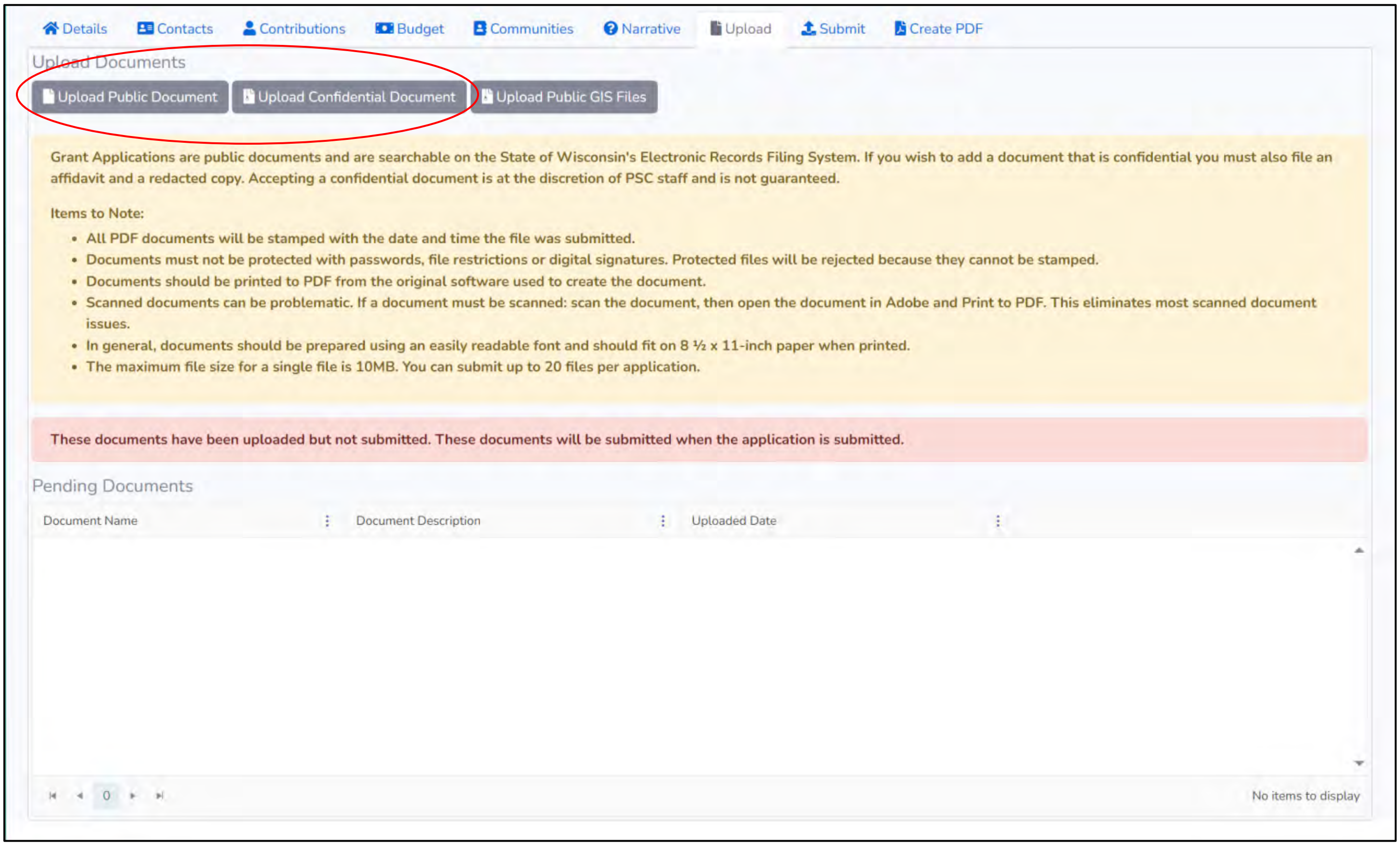
**Public Records & Confidentiality**

Once an application is submitted, the grant application and all documents uploaded with the application become searchable public documents on ERF.

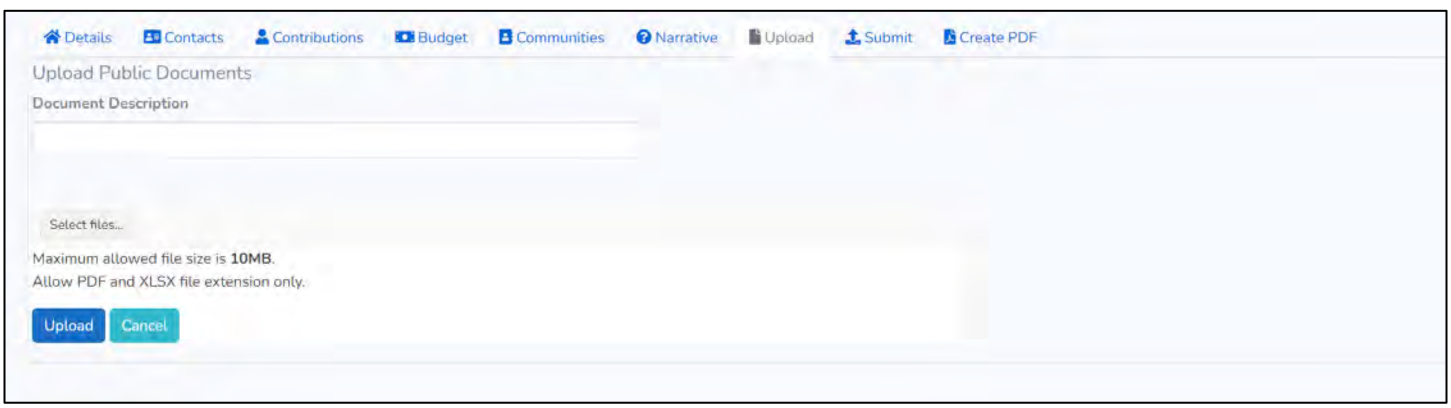
Certain attachments can be uploaded using the 'Upload Confidential Document' button to *request* confidential handling in limited circumstances. ***Important Note:*** Filing confidential documents requires the presence of a Notary Public with the upload or a notarized attachment. See the application instructions for specific direction or confidentiality requirements or limitations for specific programs.

Upon receipt of this request, the disposition of any requests for confidentiality will be determined by the PSC's legal staff. For redacted documents, the information redacted within the document must specifically be marked within the document for each confidential filing requested; An entire document may not be filed confidentially. Also, a confidential filing requires both the original document and a redacted version to be filed and made available to the public on ERF. Only PSC staff can view the original document in the grant system and on ERF. No external parties – not even the applicant (or recipient) – can view the original confidential document in the grant system or ERF.

To upload a public document or confidential document, click the appropriate ‘Upload Public Document’ or Upload Confidential Document’ button.

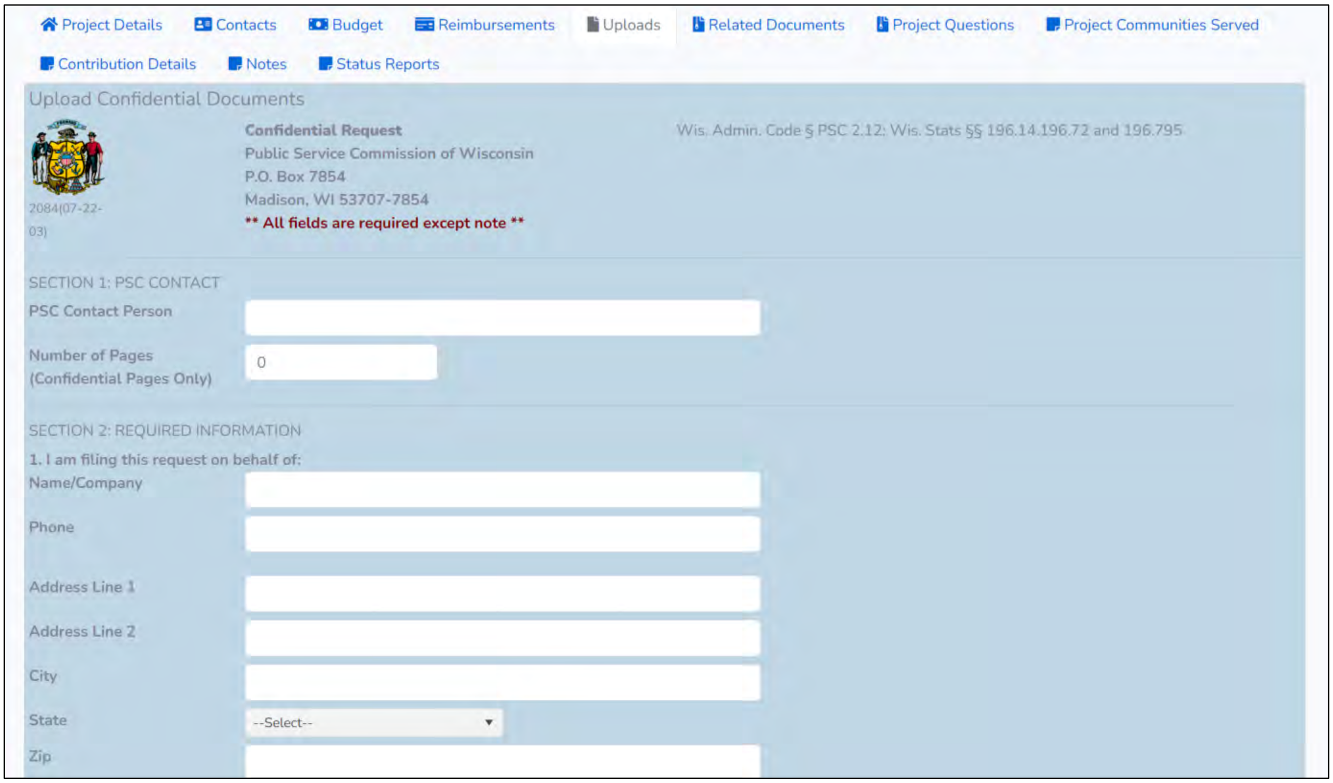



When uploading a public document, the screen allows will look as follows:

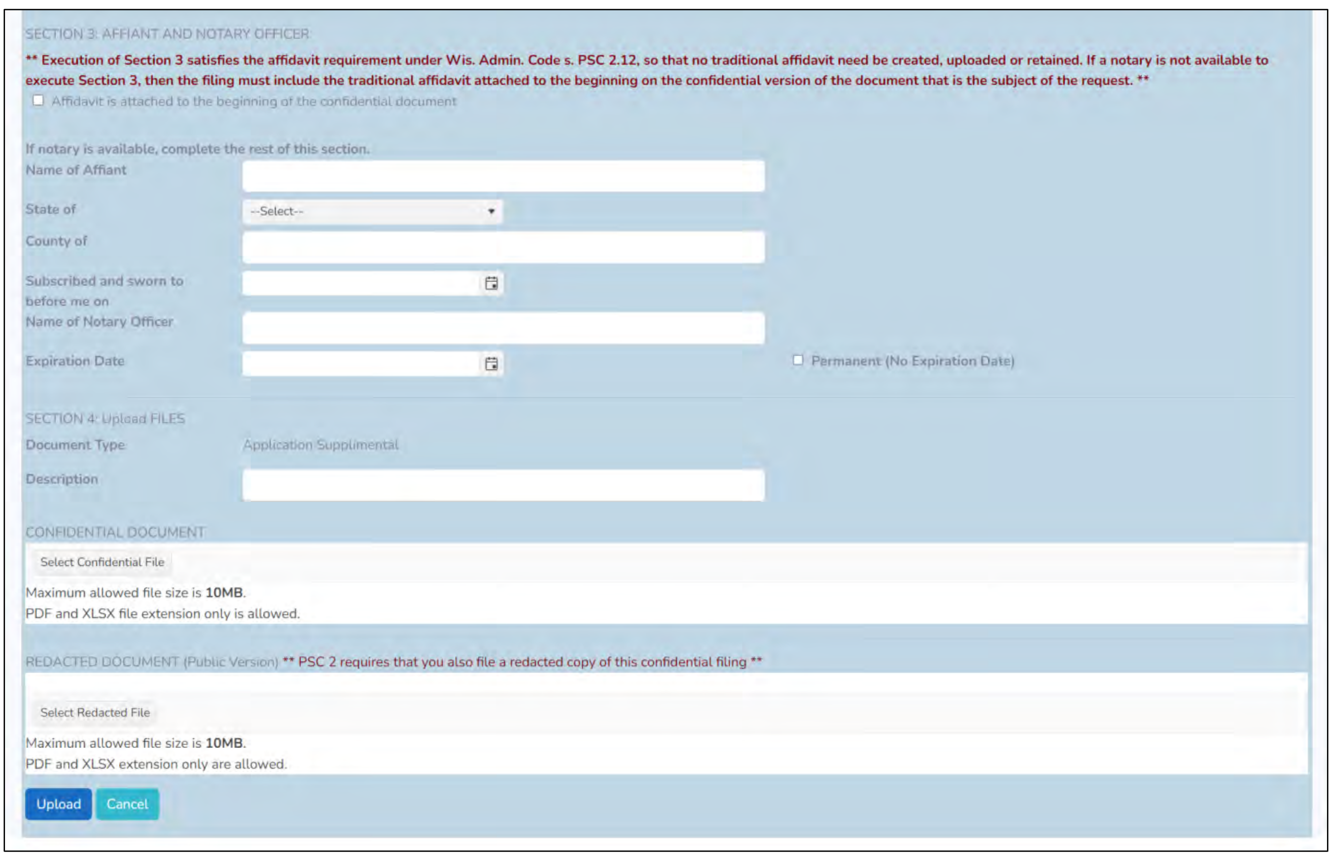



Enter a description, click the ‘Select Files’ button to select the .pdf or .xlsx file you want to upload, and then click the ‘Upload’ button.

When uploading a confidential document, the screen will show a form that must be completed. The first two sections require PSC Contact and information explaining why the filing should be considered confidential.




The third section explains the process and involvement of a notary officer.

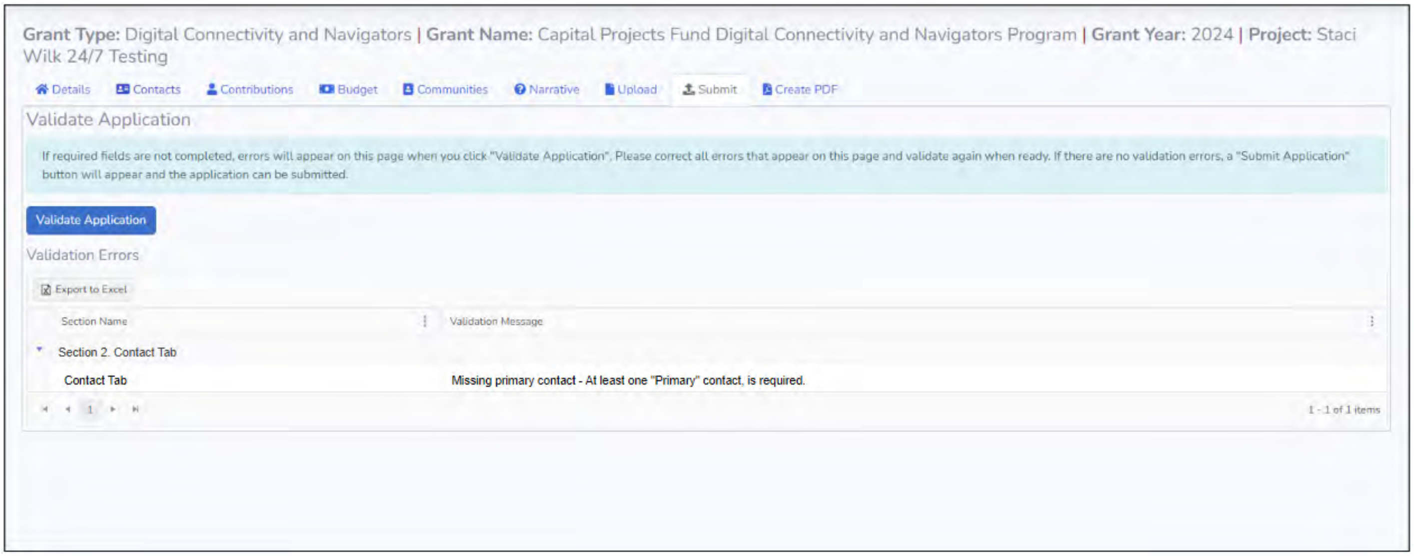


## Submit Tab

### Validate Application

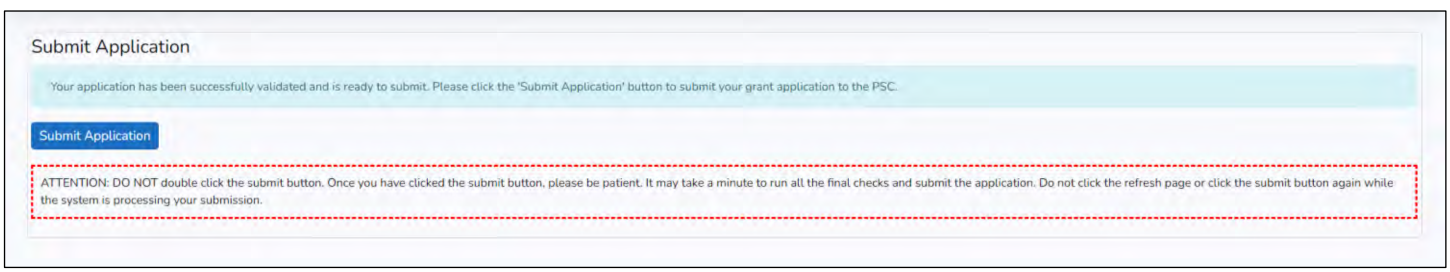
An application must be validated before submission. To do this, click the 'Validate Application' button once all information and questions on each tabs have been completed. The system will check that all required fields contain entries and that budget details match in the Grants Detail, Contributions and Budget Pages.

Items needing correction will appear in the 'Validation Errors' grid. If needed, use the "Export to Excel" button to obtain a spreadsheet of the validation errors.




### Submit Application

Once all validation errors have been corrected, if any, a 'Submit Application' button will appear. Click the 'Submit Application' button to finish the application process and submit the application. No changes can be made to an application once it is submitted.



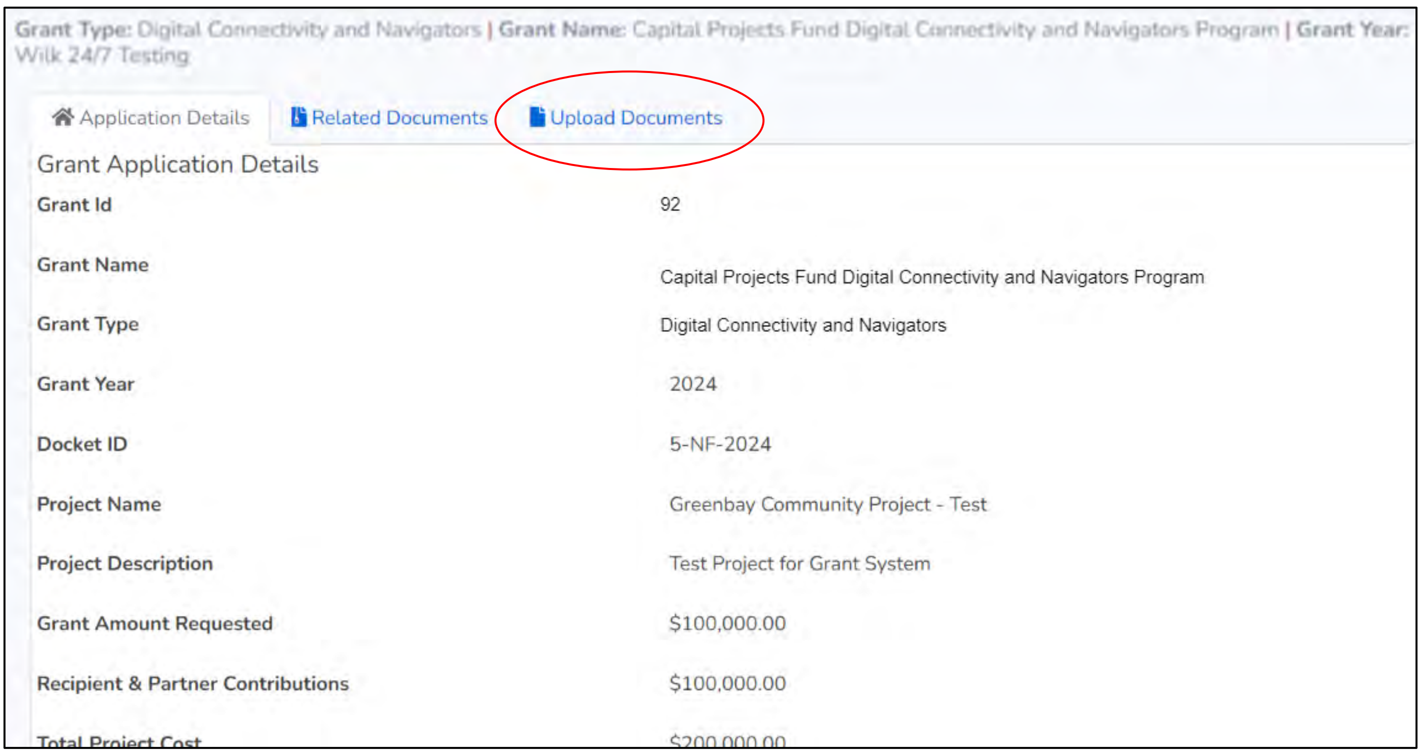

When an application is submitted the individual who created the application will receive a confirmation screen that the submission is complete. There may be a slight delay between clicking the 'Submit Application' button and application documents appearing on ERF. A document containing application responses will be auto generated and stored on ERF upon submission as well.

**Request to Cure Application**

After submission of your Application, Commission staff may request “a cure” through an email. Curing in this context means either revising or providing additional information either before or after the funding awards are taken up by the Commission at an Open Meeting.

If a cure request is sent via email to the applicant, it is imperative that the applicant login to the PSC Grants System and respond to the request to cure within the allotted timeframe. Often there is additional information required and a Grant Staff will use an Admin feature to Enable an upload, which will allow the additional information to be uploaded for review.

When the application is clicked on the Upload Documents tab will appear so that additional or supporting information can be uploaded:

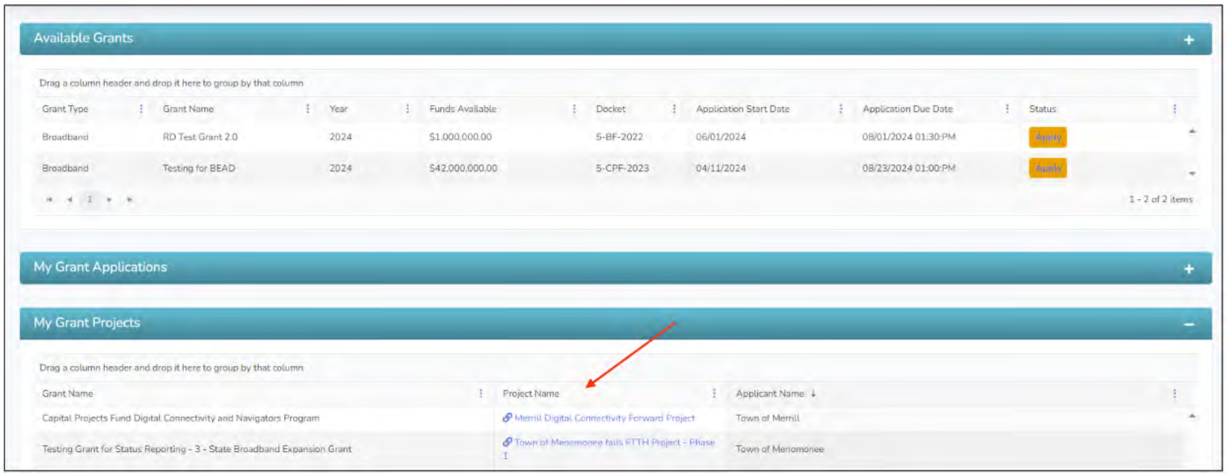



# Grant Recipient Onboarding

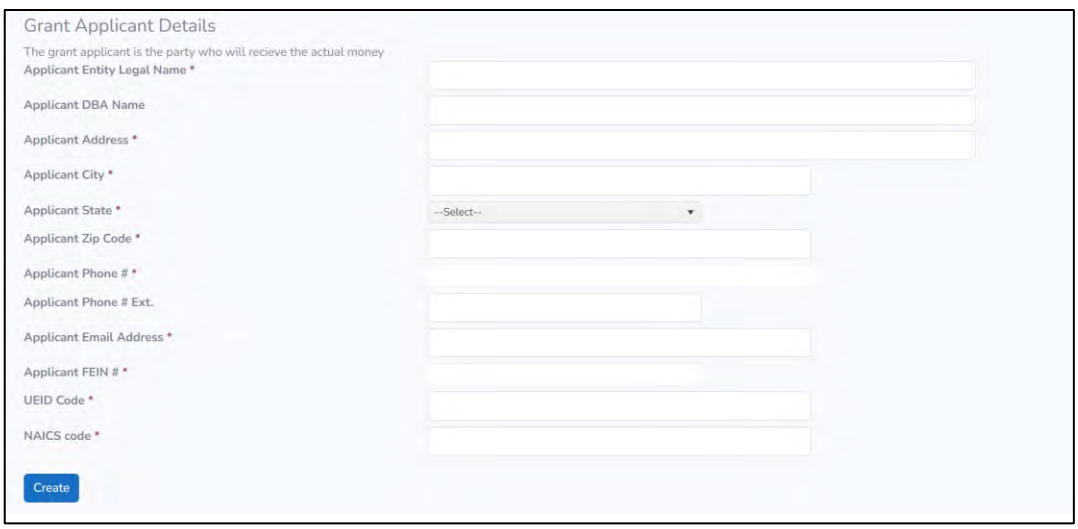
Grant applications selected for funding will be notified by Commission staff after the Commission Order has been published on ERF. The Grant Recipient can expect to receive a welcome package via email which will likely request some additional information and onboarding document uploads.

# Managing a Project

During the onboarding process PSC staff will create a project in the system for applications that are selected for funding.  Once notified of an award selection, Grant Recipients will be directed to review project(s) under ‘My Grant Projects’ on the homepage. Click the hyperlink to a project in the ‘My Grant Projects’ grid to open the project.




By default, the grant applicant added to the Grant Applicant Details during the application process will have access to the Grant Project in the PSC Grants System because they will be associated with the account that is set up.

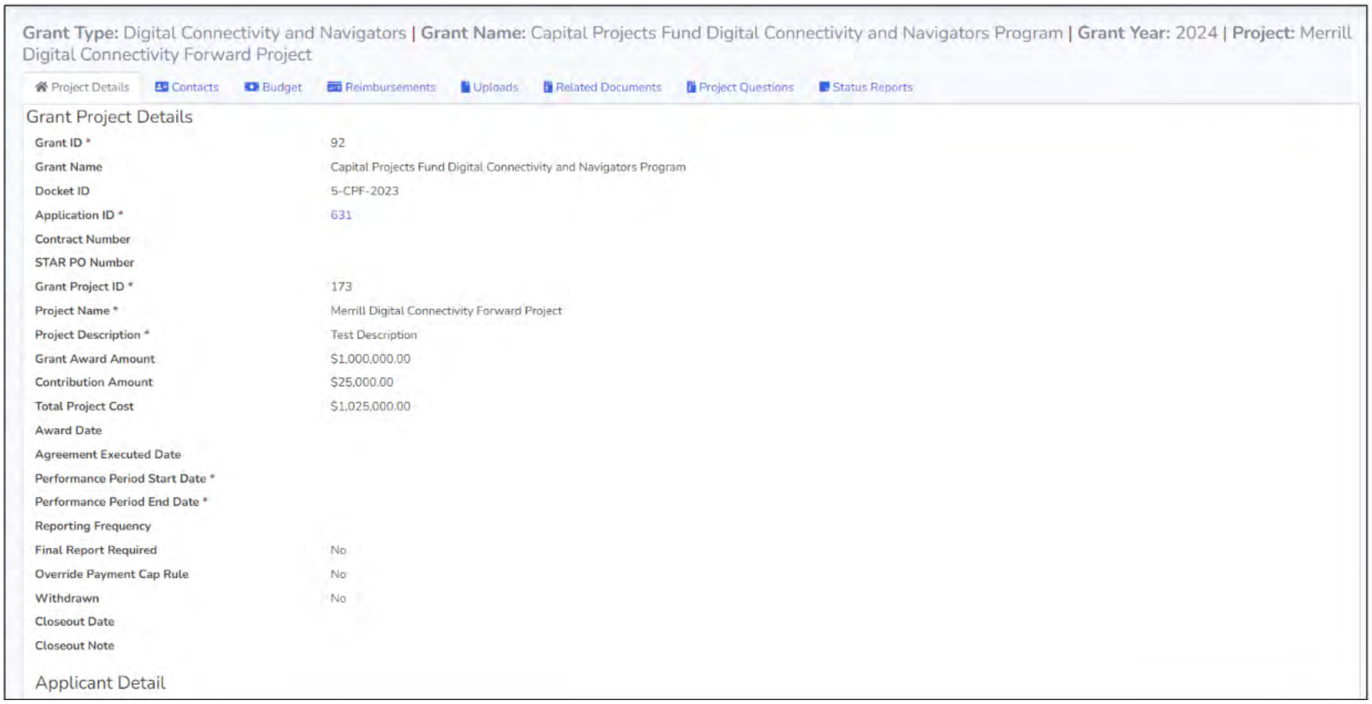



Within a project, there are multiple tabs for managing the information associated that was submitted through the application process.

**NOTE:** If additional users need to access the grant application or project other than the grant applicant identified on the screen above, contact the PSC staff to have them added as grant application owners.  This can be done after the application is submitted.

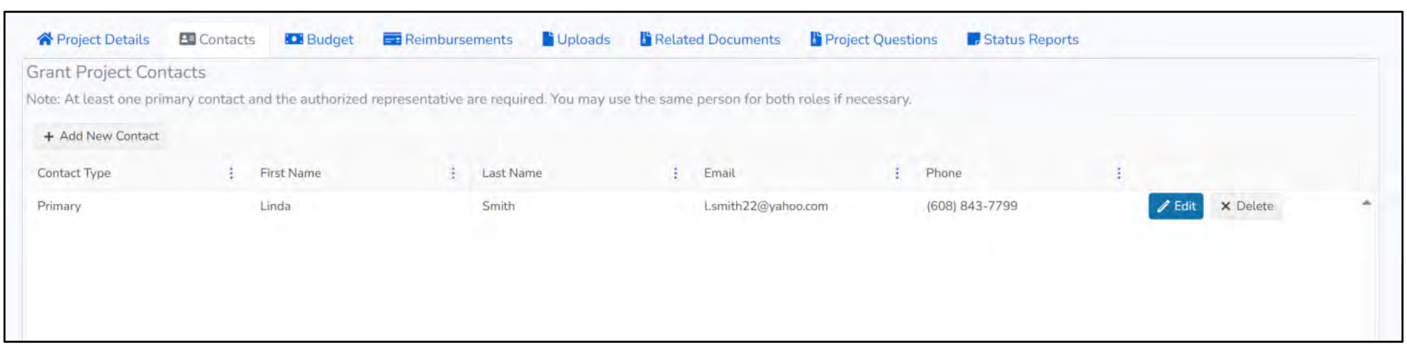
## Project Detail Tab – Applicable for all grants

The Project Detail tab is read-only for Grant Recipients. Only PSC grant managers can make changes to this information at this point. Changes to the Award date, Agreement Executed Date, the Performance Period Start and End Date, any status of an application or Award amounts, grant funded or contribution will all be reflected on this page and only updated by PSC staff.



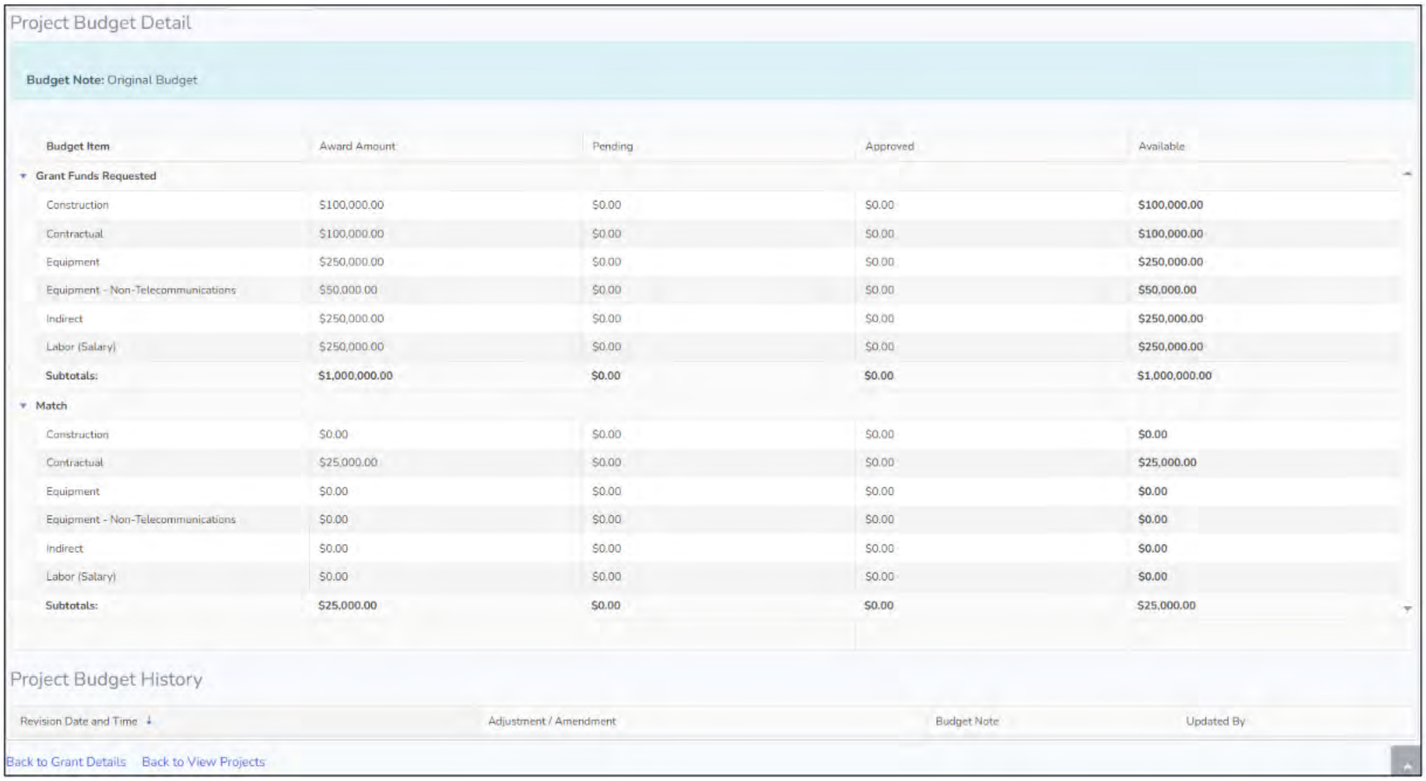

## Contacts Tab – Applicable for all grants

The Contacts tab will continue to be editable for a Grant Recipient so they can add new contacts to their projects and edit the information for existing contacts that were submitted with the application. This functionality is the same as it is in the application process. See contact definitions on page 6.



## Budget Tab – Applicable for all grants

The Budget tab is read-only for Grant Recipients. The budget will reflect what was submitted in the Grant Application. Only PSC staff can make changes to the project budget and may do so if the Commission makes a partial award or if an amendment is needed. The values in the Pending, Approved and Available column automatically update as reimbursement requests are received and processed. (See "Reimbursements tab" on p.19)



Project Budget Detail

**Budget Note:** Original Budget

| Budget Item | Award Amount | Pending | Approved | Available |
|---|---|---|---|---|
| **Grant Funds Requested** | | | | |
| Construction | $100,000.00 | $0.00 | $0.00 | **$100,000.00** |
| Contractual | $100,000.00 | $0.00 | $0.00 | **$100,000.00** |
| Equipment | $250,000.00 | $0.00 | $0.00 | **$250,000.00** |
| Equipment - Non-Telecommunications | $50,000.00 | $0.00 | $0.00 | **$50,000.00** |
| Indirect | $250,000.00 | $0.00 | $0.00 | **$250,000.00** |
| Labor (Salary) | $250,000.00 | $0.00 | $0.00 | **$250,000.00** |
| **Subtotals:** | **$1,000,000.00** | **$0.00** | **$0.00** | $1,000,000.00 |
| **Match** | | | | |
| Construction | $0.00 | $0.00 | $0.00 | **$0.00** |
| Contractual | $25,000.00 | $0.00 | $0.00 | **$25,000.00** |
| Equipment | $0.00 | $0.00 | $0.00 | **$0.00** |
| Equipment - Non-Telecommunications | $0.00 | $0.00 | $0.00 | **$0.00** |
| Indirect | $0.00 | $0.00 | $0.00 | **$0.00** |
| Labor (Salary) | $0.00 | $0.00 | $0.00 | **$0.00** |
| **Subtotals:** | **$25,000.00** | **$0.00** | **$0.00** | $25,000.00 |

Project Budget History

| Revision Date and Time | Adjustment / Amendment | Budget Note | Updated By |
|---|---|---|---|

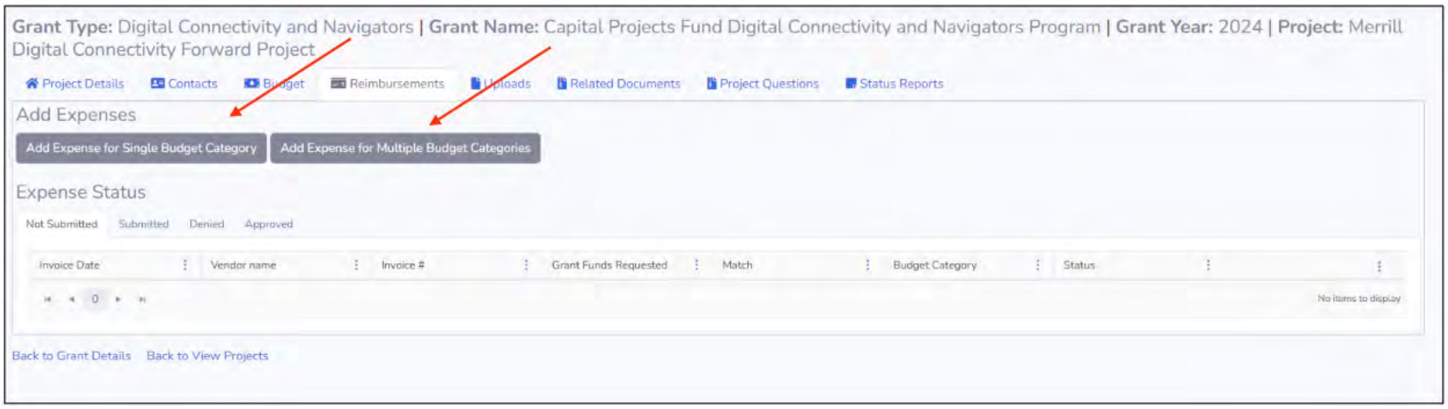
Back to Grant Details Back to View Projects

## Reimbursements Tab – Applicable for all grants

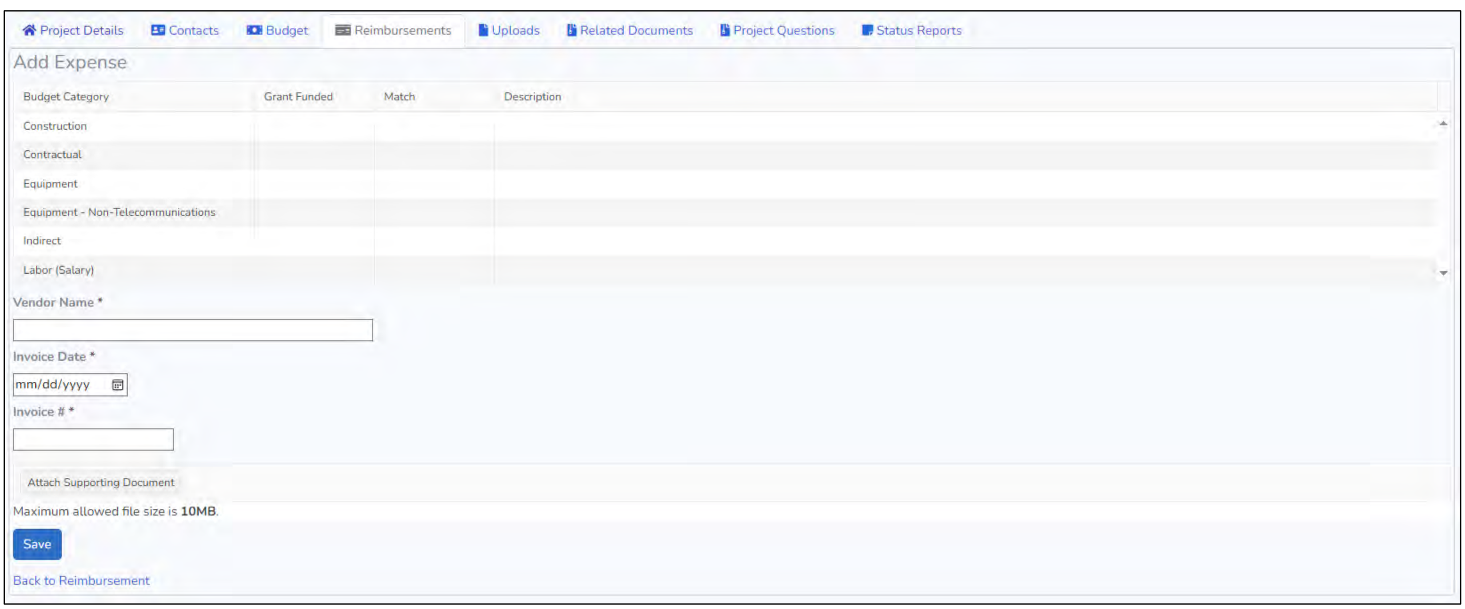
The Reimbursements Page is used to request reimbursements and track the status of reimbursement requests. To submit a reimbursement request, have all supporting documents or excel workbooks ready for uploading. The system only accepts .pdf and .xlsx documents. Other file types (.jpg, .tif, Word documents, etc.) are not accepted.

**Note**: If the support document is an Excel spreadsheet, upload it as spreadsheet instead of converting to a PDF. Also, for each reimbursement request, the required attestation will need to be completed prior to submission.

Once the files are ready, select the type of expense report that best fits with what is being submitted.  The options are either a single budget category expense or a multiple category expense.



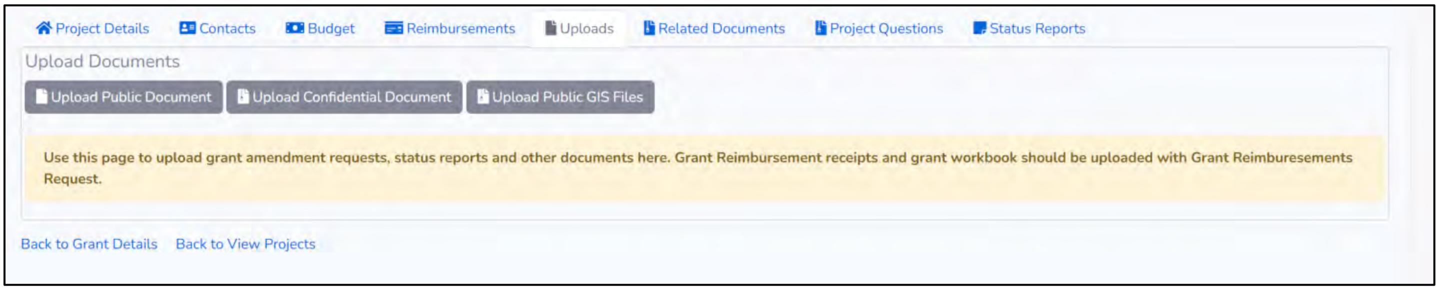

In the reimbursement request, enter the amounts by budget category type, including both the grant funds requested and the matching contributions applied to each type. Once a file is uploaded, it will appear in the Related Documents tab. Uploads to the Reimbursement tab are not published to ERF. They will only be stored in the Grants System.




Grants staff will review and either accept or reject the reimbursement request. If a reimbursement request needs to be modified, the entire submission will be rejected. When a new reimbursement request is changed and resubmitted, all documentation will need to be reloaded.

## Uploads and Related Documents Tab – Applicable for all grants

The Uploads tab is used to submit documents related to a project proposed during the application process and will disappear once an application is submitted. If an application is awarded funds as a project, this tab will be presented again and will allow public documents or confidential documents to be uploaded just as it did during the application phase. (See page 11 and 12) Some projects may require public geographic information systems (GIS) files. If this is applicable, the system will zip the files and they can be uploaded in this tab as well:



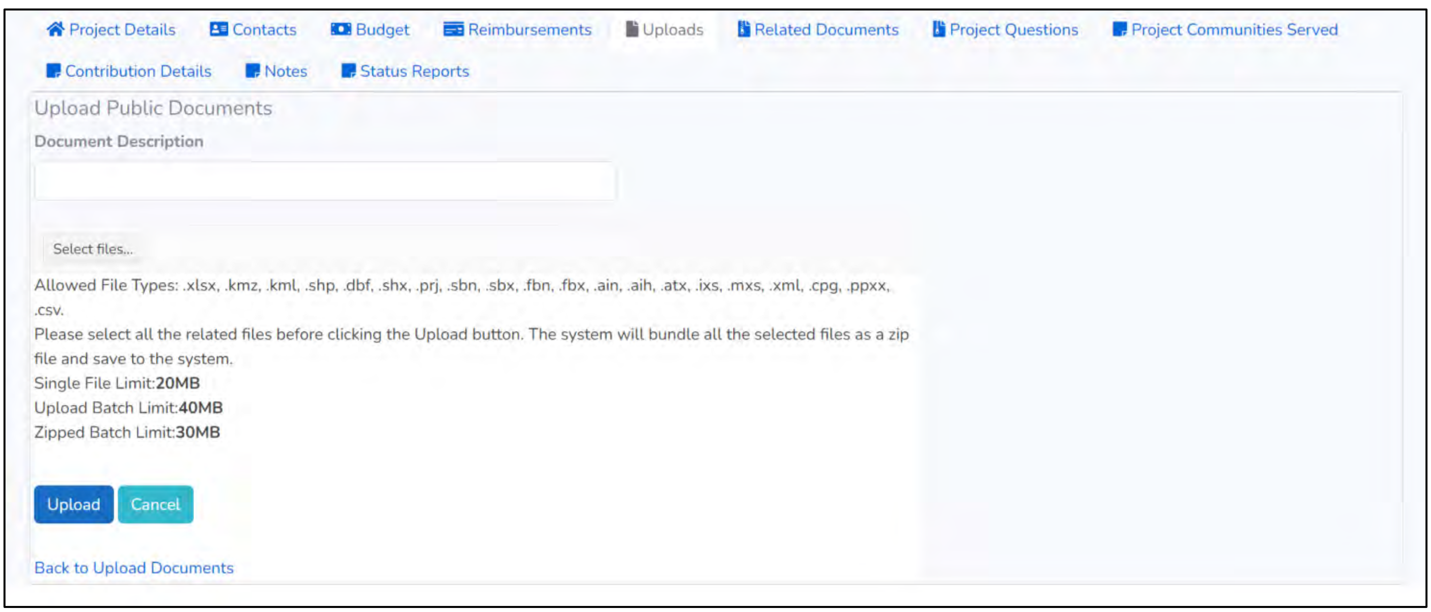
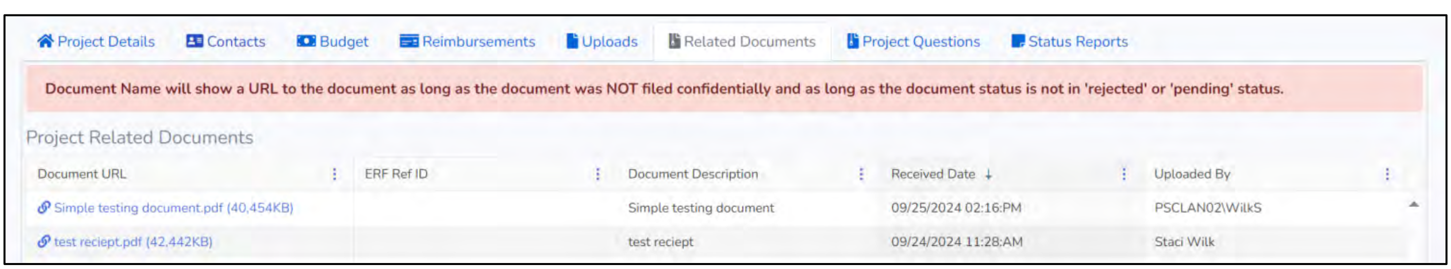




*Image of Public Document Upload 1*

Files that are uploaded will appear in the Related Documents tab. (See Public Records & Confidentiality in the Upload Page section for more information on uploading confidential documents.)



## Document Types

During the life cycle of a Grant, different document types may be requested by the PSC Commission from a Grant Applicant or Recipient. Below are 2 columns to outline the documents:

- The first column is intended show all documents associated with a grant that will be uploaded to ERF through the grant system during the grant life cycle.
- The second column shows all other Document Types that could potentially be requested or required depending on your Grant guidelines. These will not upload to ERF.

Each Grant Agreement or other written notification from Commission staff will indicate which documents are relevant to each grant program.

| Document Types that will upload to ERF | Document Types that will NOT upload to ERF |
|---|---|
| Grant application | Grant Amendment Request |
| Grant application – supplemental documents | Reimbursement Request Documentation |
| Grant Agreement | Reimbursement Workbook |
| Grant Agreement Amendment | Reimbursement Supplement |
| Status Report | Environmental Screening Tool |
| Status Report - Final | NEPA Environmental Questionnaire |
| Close Out Letter | Onboarding Documents |
| Affirmative Action Documents | Publications |
| Audit Report | GIS Files |
| Data Request | |
| Attestation | |

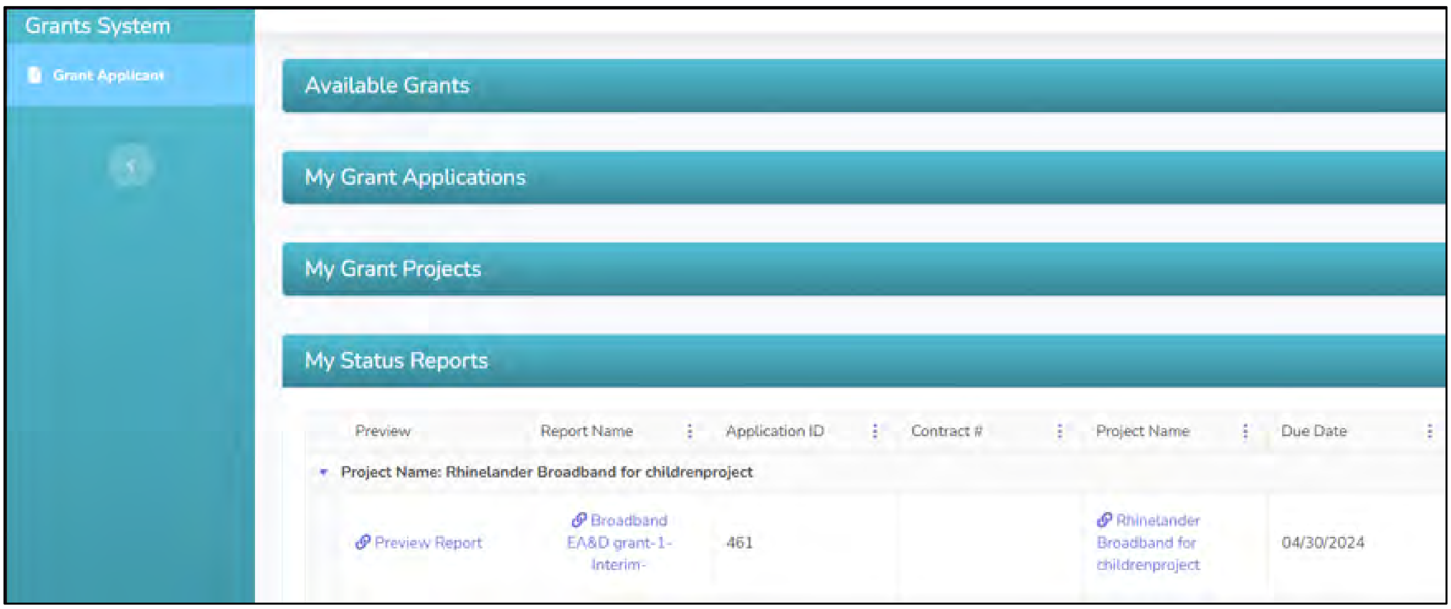
### Status Reports Tab – Applicable with the Grants System Status Reporting feature

The Status Reporting tab will show questions and answers to a status report that has been submitted for grants that use the Grant System to report progress on their projects. An actual status report, when available, will be presented in the My Status Reports section on the home page. Questions and answers submitted through the report will accessible on this tab AFTER a report has been submitted from the My Status Reports section.

## Project Reporting – Applicable if using system Status Reports

### Status Report Delivery – Applicable for certain grants

The Grants System introduced internal reporting as of June of 2024. For certain grants, PSC Staff will create interim, final, and other Status Report templates in alignment with the requirements of the Grant Agreement for each project. Once a report is published by PSC Staff, it will be available to Grant Recipients in the My Status Reports section on the PSC Grants System Customer Portal landing page:

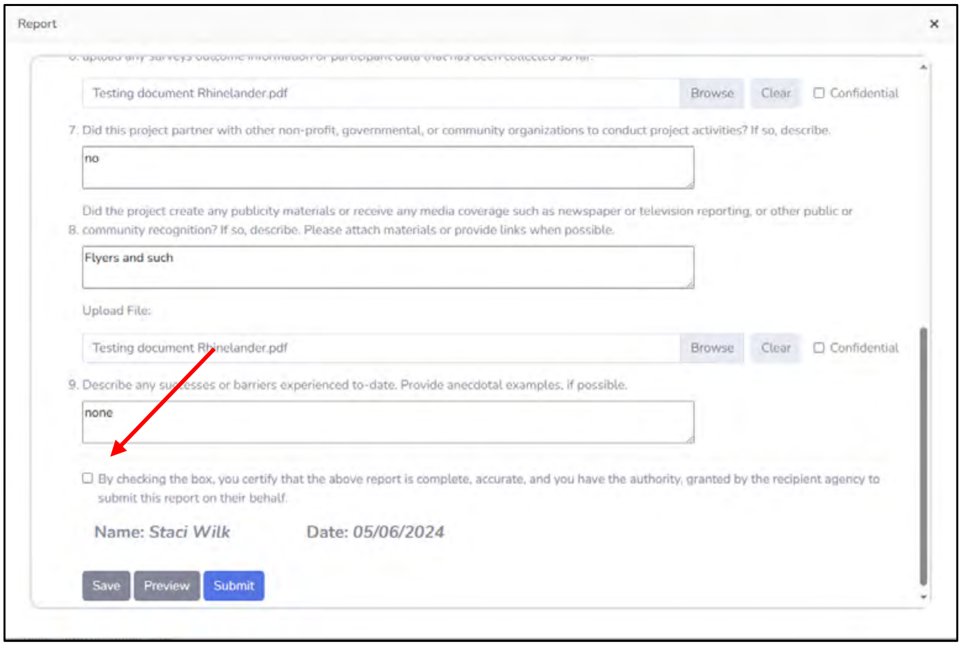



There are three hyperlinks that a Grant Recipient can use to navigate from this section.

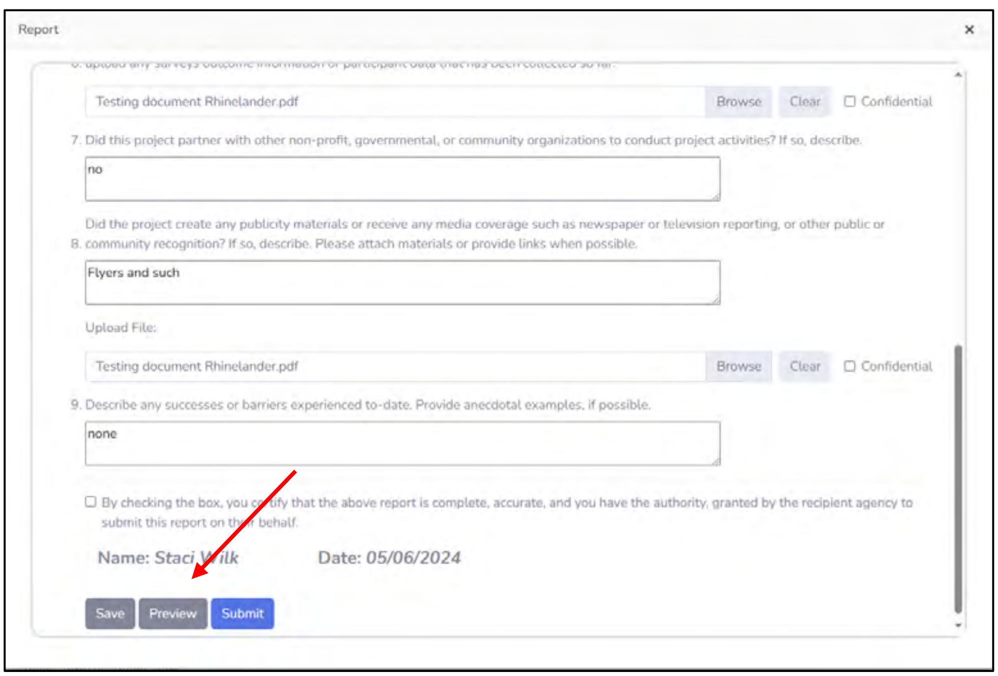
- Preview Report link: This link will provide a download of the report in case this report needs to be reviewed with others prior to completing or in general if a .pdf is preferred. Upon clicking the link, the report will be available in the downloads section of your computer.
- Report Name link: This links directly to the report and will present as a pop-up window with questions related to the reporting period for which the report was generated.
- Project Name link: This links directly to the project and will display all associated tabs to the project.

## Completing a Status Report – Applicable for certain grants

For each report, once the Grant Recipient provides a response to the questions provided, the attestation will need to be completed prior to submitting their report. Name and Date will auto populate from the log in.




Grant Recipients can preview the questions through the 'Preview' button in case they need to collaborate with coworkers or contractors on providing an answer. Once the 'Preview' button is clicked, the input screen will download to their machine as a .PDF for review or printing.



The Grant Recipient will be notified via email at four touchpoints throughout their project's life cycle:

- When the Status Report is available.
- When a Status Report is coming due for them, 1-day prior.
- A reminder that the report is due, one day past the due date.
- Anytime a Status Report needs to be cured.

The messages are sent from PSC E-Services Mail noreply.eservices@wisconsin.gov and the triggers and messages for the notifications are as follows:

| **Courtesy Notification Type** | **Trigger** | **message** | **PSC Grant Staff notification** |
|---|---|---|---|
| Recipient Notification - Your Status Report is Available | [Publish date] set by Grant Staff | Subject: Your Project Status Report for [Report Name] is available<br><br>Hello,<br><br>Your report, [Report Name], is available.  Please complete and submit your report by [Due Date] and your Grant Manager will be notified.<br><br>Thank you for your attention in advance. | CC shared inbox for grant staff |
| **Courtesy Notification Type** | **Trigger** | **Message** | **PSC Grant Staff notification** |
| Recipient Notification - Your Status Report is coming due | 1 day prior to the [Due Date] | Subject: Your Project Status Report for [Report Name] is coming due<br><br>Hello,<br><br>Your report, [Report Name], is coming due.  Please complete and submit your report by [Due Date] and your Grant Manager will be notified.<br><br>Failure to submit reports in a timely manner may result in a delay in reimbursement payment or non-compliance measures. If you have already submitted your reports, please disregard this | CC shared inbox for grant staff |

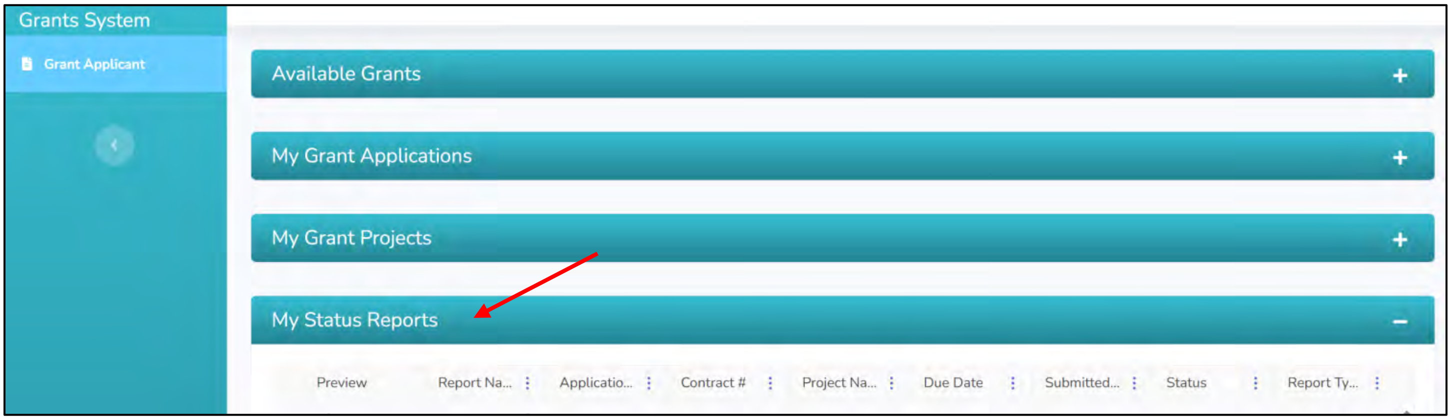
| | | | |
|---|---|---|---|
| | | message.<br><br>If you experience any issues submitting documentation, please contact your Grant Manager.<br><br>Thank you for your attention in advance. | |

| **Courtesy Notification Type** | **Trigger** | **Message** | **PSC Grant Staff notification** |
|---|---|---|---|
| Recipient Notification - Your Status Report is due | 1 day after the [Due Date] | Subject: Action Required - Your Project Status Report is due for: [Report Name]<br><br>Hello,<br><br>We did not receive your interim status report on [Due Date].<br><br>This is your reminder to submit the report within the PSC Grant System Customer Portal within 10 business days of receipt of this email.<br><br>As always if you have questions or need assistance completing the report, please contact your Grant Manager. | CC shared inbox for grant staff |

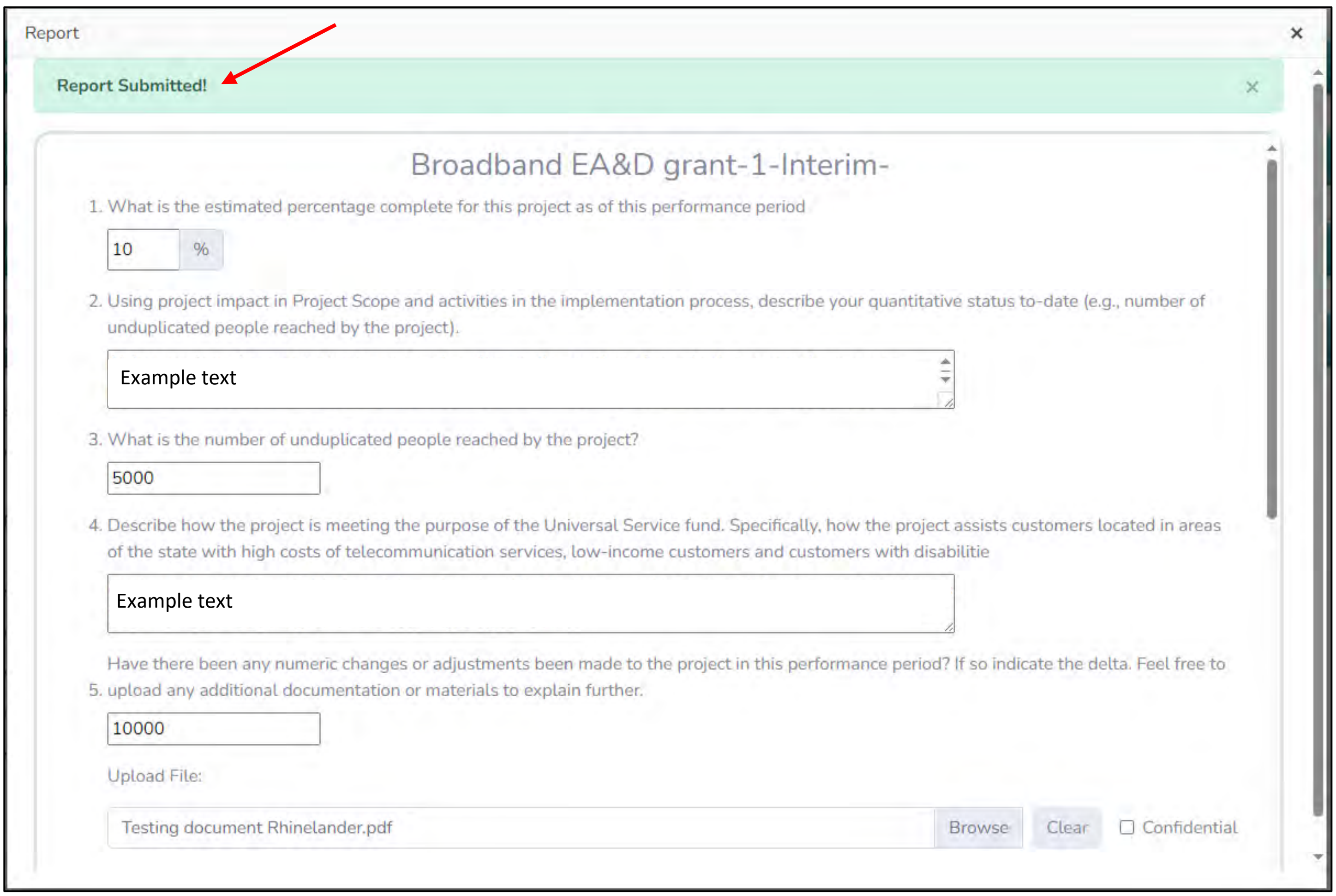
| Courtesy Notification Type | Trigger | Message | PSC Grant Staff notification |
|---|---|---|---|
| Recipient Notification - When a report requires a cure | Anytime, system generated by Grant Manager | Subject: Action Required - Request to cure for Project Status Report: [Report Name]<br><br>Hello,<br><br>The Public Service Commission of Wisconsin is requesting additional information for your project status report: [Report Name].<br><br>Please complete this request by logging into the PSC Grants System Customer Portal and navigate to the My Status Report section to cure and submit the refile version of this report.<br><br>As always, if you have questions or need assistance completing the report, please contact your Grant Manager. | CC shared inbox for grant staff |

All emails will have the note: ** Please do not reply to this email. It is sent from an unmonitored mailbox. **

When a Grant Recipient is notified, they will be directed to log into the PSC Grants System Customer Portal, navigate to the My Status Reports section to complete the report.




Grant Recipients can click into the Report Name and update from this page. Functionality includes saving, leave & return, and submit from this report pop up. When the report has submitted, a notification will be presented:

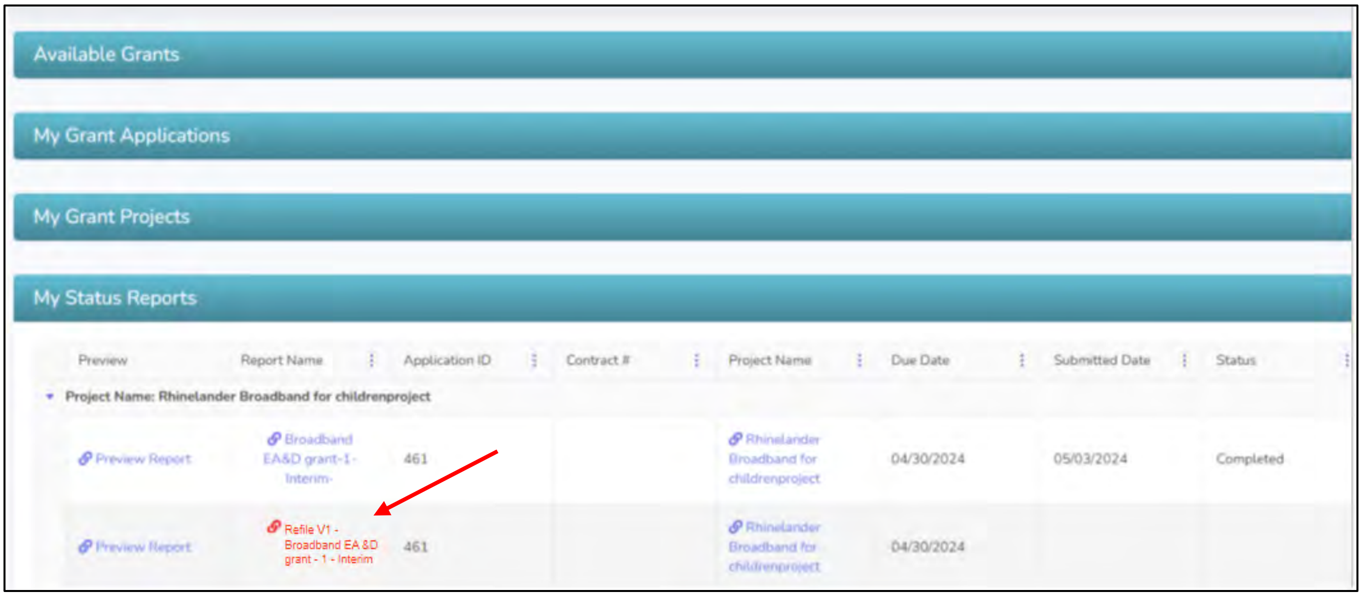


## Refiling a Status Report – Applicable for certain grants

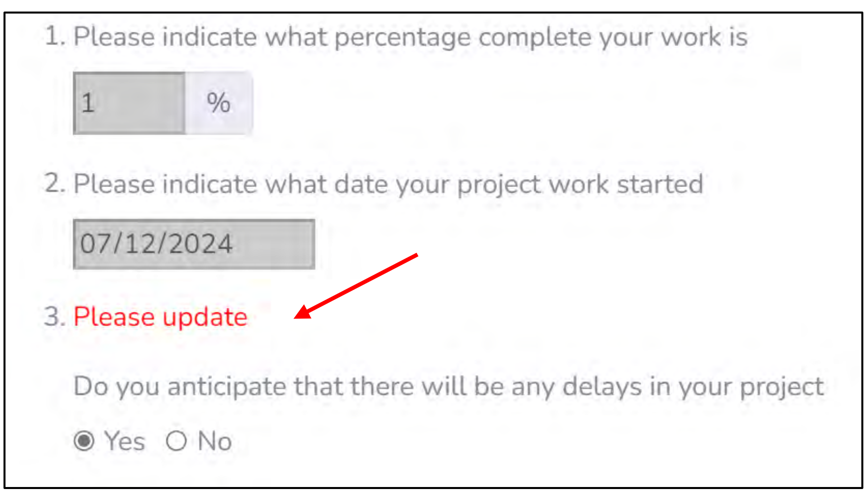
When a status report requires additional attention, the Grant Manager may request what is referred to as a refile. A refile is intended to elicit additional information regarding an answer. A Grant Recipient will receive an email to request that they log into the PSC Grants System Customer Portal to revise their Status Report questions and “refile” the report.

To complete this step:

1. Log into the PSC Grants System Customer Portal and navigate the My Status Report Section. A new version of the Report with the word Refile in the Name will appear in red as a visual cue to indicate that this report requires attention.




2. Click on the Report Name link and update the questions in red. The others will remain locked:



3. Replace the original answer with the updated answer for only the questions that have been requested.
4. Scroll to the bottom of the report and check the box to attest to the accuracy of the updated information.
5. Once you have completed the attestation, click submit.