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Introduction

This guide is intended for applicants who wish to apply for any grant program offered by the Public Service Commission (PSC) of Wisconsin. This guide will walk you through all steps in the grant application and management process in the PSC’s online grants system. Consider keeping this guide in a handy place to reference as you work with the system through different aspects of the grant process.

Create an Account

PSC Grants System users must also have an account on the PSC’s Electronic Records Filing system (ERF) to access the PSC Grants System. That means that prior to registering in the Grants System, you must create and validate an ERF account if you do not already have one. The PSC Grants System login page has links so you can complete both tasks.

Step 1 – Login Page

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

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

- If you already have an ERF account, follow the link to validate your ERF Account.
- If you need to create an ERF account, follow the link to create an ERF Account, then return to the login page and follow the link to validate your ERF Account.

Step 2 – Validate your ERF account

- Enter your ERF Login ID and ERF Password and click ‘Validate’. 
Step 3 – Create PSC Grants System User and Login to the system

Once you’ve validated your ERF account, you can 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. Check your SPAM filter(s) if you do not receive the email; the confirmation email will be from a ‘@wisconsin.gov’ email address (could also display as '@wi.gov.')
- When you have confirmed your email address, click the ‘You can now login to the PSC Grants System’ link to begin using the PSC Grants System.
Apply For a Grant

Once you have logged into the PSC Grants System, grant programs currently accepting applications will be displayed in the Available Grants section of the home page. Locate the grant you wish to apply for and click ‘Apply’ to begin a grant application.

When you start an application, it will be listed with a status of Active under the My Grant Applications section of the home page. You can continue to make updates and edits to a grant in Active status up until the application deadline or until you submit the application. Click the hyperlink in the Project Name column to open an application in progress or to view a submitted grant.
Grant Details Page

You must enter initial details in the Grant Application Details page before additional tabs will be displayed for the grant application. The Applicant Entity Legal Name must be the entity that will sign the grant agreement, submit reimbursement requests, and receive grant disbursements.

Note: Fields with a red asterisk must be filled in before you can navigate to other section tabs. Grant Amount Requested, Recipient & Partner Contributions, and Total Project Cost are not required until you submit the application. Upon submission the system will validate that the values in these fields match the calculated subtotals on the Contributions Page and Budget Page.

Enter the required details and click ‘Create’ to save the application. You will now see additional tabs for entering application information.

Contacts Page

On the Contacts Page enter all contacts related to the application. Click ‘Add New Contact’ to enter a contact. You must designate at least one Primary contact.

• Primary: The person submitting the application into the System. By default, only this person will have access to the grant application in the system.
• Secondary: a backup contact for the Primary.
• Financial Manager: 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: 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.
• **Authorized Representative**: The individual authorized to sign the grant agreement.

• **Contractor**: If a contracted consultant prepared your application, enter their contact information.

### Contributions Page

Contributions of the Applicant and its Partners, often referred to as “match,” are important to understanding the project and will be discussed on multiple Tabs:

- **Details Tab**: Subtotal of Applicant + Contributor portion of overall project budget.
- **Contributions Tab**: Details on contributions organized by entity, Applicant and Contributors
- **Budget Tab**: Details on overall budget, including a subtotal of Applicant and Partner contributions, organized by item cost type (“line item” e.g. salary, equipment)

These subtotals must validate across pages. All in-kind contributions require a description.

**Note:**

1. If the subtotal for Recipient & Contributions on the Budget Page does not match the subtotal on the Recipient & Contributions Page, the system will warn you. You cannot submit an application until the values match.

2. If the total value on the Recipient & Contributions Page does not match the Recipient & Contributions amount entered on the Grant Details Page, the system will warn you. You can continue to work on other parts of the application with these numbers not matching but the amounts must match in order to successfully submit your application.

### Budget Page

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 funds. All fields require an entry. Enter zero if there are no costs for the field.

**Note:** Be sure to click ‘Save Changes’ before navigating away from this page or you will need to re-enter!
Note:

1. If the subtotals on the Budget Page do not match the Contributions total and Grant Amount you entered on the Grant Details Page, the system will warn you. You cannot submit an application until the values match. (See section on Contributions Page)

2. If the subtotal for Contributions on the Budget Page does not match the subtotal on the Contributions Page, the system will warn you. You cannot submit an application until the values match.

Communities Page

On the Communities Page, enter the county/counties and municipalities to be served by the project. Both fields are required.

**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 ‘State Wide’ in both the ‘County’ dropdown and the ‘Municipality’ dropdown menus.

Select ‘Update’ to save changes on the Communities Page.
Narrative Page
The Narrative Page includes questions and can consist of multiple pages. Be sure to click ‘Save’ before navigating to another page in the tab or another tab in the application or you will lose your progress.

Note:
1. All questions require an answer before an application can be submitted.
2. Enter N/A for questions that do not apply.

Upload Page
Upload any additional documents as required by the Application Instructions for the grant program to which you are applying. Once the application is submitted, uploaded documents are stored in the PSC’s ERF system.

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 details and all document uploads become searchable public documents on ERF.

To upload a public document, click ‘Upload Public Document’. 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.

You can upload confidential attachments, provided that the record satisfies one or more of the criteria provided in Wis. Stat. § 19.36(5) or another provision of the Wisconsin Public Records Law, Wis. Stat. § 19.31 to 19.39 related to confidentiality. You may not file an entire application confidentially. A confidential filing requires you to file both the original document and a redacted version that is made available to the public on ERF. Only PSC staff can view the original document. No one else—not even the applicant—can view the original confidential document once it is submitted to the grant system or ERF. Filing confidential documents requires the presence of a Notary Public with the upload or a notarized attachment.

To upload a confidential document, click ‘Upload Confidential Document’ and follow the instructions on the screen.
Submit Page

Validate Application

You must click ‘Validate Application’ before you can submit your application. 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. You can also use “Export to Excel” to obtain a spreadsheet of the validation errors.

You will need to correct all validation errors before “Submit Application” option will appear.

Submit Application

Once all validation errors have been corrected, a ‘Submit Application’ button will appear. Click ‘Submit Application’ to submit your application. You may not make changes to your application once it is submitted.

When you submit your application, the individual who created the application will receive an email confirmation that the submission is complete. There may be a slight delay between clicking ‘Submit Application’ and your application documents appearing on ERF. A document containing your application responses will be auto generated and stored on ERF when you submit.
Manage your Project – Grant Recipients

When a grant application has been awarded funds, PSC staff create a project in the system. You will see your project(s) under ‘My Grant Projects’ on the homepage. Click the hyperlink for your project in the ‘My Grant Projects’ grid to open the project.

By default, the same user who created the application will have access to the Grant Project in the PSC Grants System. If you wish to add additional users to your Grant Project, contact PSC staff.

Once you open your project, you will see six tabs for managing your grant. Project Details, Budget and Reimbursements are read-only pages.

Project Detail Page
The Project Detail Page is read-only for Grant Recipients. Only PSC grant managers can make changes to this information. Changes will be reflected on this page as it is updated by PSC staff.

Contacts Page
Grant applicants can add new contacts to their projects and edit the information for existing contacts. This functionality is the same as it is in the application process. See contact definitions on page 5.

Budget Page
The Budget Page is read-only for Grant Recipients. The budget will reflect what was submitted in the Grant Application. Only the Grant Manager can make changes to the project budget, and may do so if the Commission makes a partial award or there is a budget amendment processed. The values in the Pending, Approved and Available column automatically update as reimbursement requests are received.
and processed. (See “Reimbursements Page” Section on p.15)

Reimbursements Page
Use the Reimbursements Page to request reimbursements and track the status of your reimbursement requests. To be clear, this guide is a “how to use our grant management system” guide. Consult your grant agreement and other program resources to understand the reimbursement policy, requirements, and details. (Such as, how many reimbursement requests are allowed, what is an eligible expense, the type of support required, etc.)

To submit a reimbursement request, have your Excel workbook completed and all support documents ready for uploading. The system only accepts .pdf and .xlsx documents. Other file types (.jpg, .tif, Word documents, etc.) are not accepted.

Note: If your support document is an Excel spreadsheet, upload it as a spreadsheet instead of converting to a PDF.

Once your files are ready, click ‘Create Reimbursement Request’.

In your reimbursement request, enter the amounts requested by 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 Page. Uploads to the Reimbursement Page do not get stored on ERF. They will only be stored and accessible in the Grants System.
PSC staff will review and either accept or reject your reimbursement request. They cannot return a reimbursement request for modification nor make any modifications to your request. If a reimbursement request needs to be updated, PSC staff will reject the entire submission and you will need to create a new reimbursement request and upload all documentation. You will receive an email confirming whether or not your reimbursement request is approved or rejected. If rejected, the email will provide a brief description of the reason for the denial.

**Uploads Page**

Use the Uploads Page to submit any additional documents related to your project, such as grant amendment requests and Interim and Final Project Status reports.

Once a file is uploaded, it will appear in the Related Documents Page. See the table below for which Document Types will be stored in ERF. See Public Records & Confidentiality in the Upload Page section beginning on Page 8 for more information on uploading confidential documents.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>ERF</th>
<th>Grant System Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Agreement</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Grant Agreement Amendment</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Grant Agreement Request</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Status Report Interim</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Status Report Final</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Related Documents Page
The Related Documents Page includes all documents relevant to your project, including those that were uploaded with your original application.