

## Budget Detail Access Information for School Entities Applying for ONLY Part A OR Part B

Use this guide to properly set up the Budget Details section of the application. **Please note that this guide is for applicants applying for ONLY Part A or Part B, but NOT BOTH.**

**\*School districts applying for BOTH Part A and Part B: Please see Appendix A of the funding announcement for information on how to set up the budget section.**

For the Budget Detail section (and all other application sections) to become available for data entry, applicants must complete two mandatory data entry fields and enter at least one recipient agency as shown in this guide.

ABC School District is the example Applicant Agency.

**Step 1:** Complete the Short Project Title and Brief Project Description fields in the Main Summary section.

The screenshot shows the 'Main Summary' section of an application form. At the top, there is a 'Name Title' label. Below it, there are several date and amount fields: 'Application Invitation Date', 'Continuation Invitation Date', 'Application Received Date', 'Application Award Date', 'Advisory Committee Meeting Date', 'Application Amount', 'Commission Meeting Date', and 'Notification of Award Date'. The 'Start Date' and 'End Date' fields are empty. Below these are 'Signature Paper Received Date' and 'Returned Date' fields. The 'Short Project Title' field is marked with an asterisk and contains the text 'test'. The 'Brief Project Description' field is also marked with an asterisk and contains the text 'test', with a note '(maximum 320 characters)'. Red arrows point from the text in the instructions to these two fields.

**Step 2:** Click Add Applicant Agency as Recipient Agency. This will add ABC School District as a Recipient Agency. If your application requires recipient agencies in addition to your school entity, continue using this guide. Otherwise, you have finished adding the only recipient agency and may begin entering information in the Budget Detail section.

The screenshot shows the 'Recipient Agency' section of the application form. It includes fields for 'Section Point Value' (0), 'Completion Status' (In Process), 'SubGrant ID' (--), 'Applicant Agency' (ABC School District), and 'FID #' (111111111). The 'Recipient Agency' section is currently empty. Below this are fields for 'Project Director', 'Financial Officer', and 'Primary Contact', each with a dropdown menu and a 'Details' link. A red arrow points from the text in the instructions to the 'Add Applicant as Recipient Agency' button.

After completing Step 2, you should have access to the Budget Detail section. If you need to add additional recipient agencies to the budget, complete steps 3 through 7. Your

application would require additional recipient agencies if you are passing funds through to another entity.

**Step 3:** Only continue to this step if you need to add Recipient Agencies in addition to the school entity entered in Step 2. Click Add Recipient.

Section Point Value: 0  
Completion Status:    
Created By: Mr. Chris Epoca  
Last Update By: Mr. Chris Epoca  
Created Date: 9/6/2018 11:02:12 AM  
Last Update Date: 9/6/2018 11:02:29 AM  
SubGrant ID: --  
Applicant Agency: [ABC School District](#)  
FID #: 111111111  
Recipient Agency:  
Project Director:   [Details](#) Project Director not listed in dropdown?   
Financial Officer:   [Details](#) Financial Officer not listed in dropdown?   
Primary Contact:   [Details](#) Primary Contact not listed in dropdown?   
[Additional Contacts \(0-PCCD\)](#)

**Step 4:** Enter search criteria in one or more of the fields. When searching by Recipient Agency Name, use a minimal amount of the agency name which will enhance search results. Click Search.

RECIPIENT SEARCH

Search Criteria

Recipient Agency Name:    
City:   
County:    
Zip Code:   
Federal ID Number:

Applicant Name	Federal ID Number	Address	City	County	Zip
<a href="#">Test Agency</a>		1 Main St	Test	Adams	11111

If the search results yield the correct recipient agency, click the link associated with the correct agency name and proceed to **step 5**. If the correct agency is **NOT** in the search results, click Add New Recipient and proceed to **Step 6**.

**Step 5:** Review the agency details displayed on the page. If the agency is the correct agency to be added as a Recipient Agency, click the Save button, otherwise click Cancel and search again. Repeat this process to add additional agencies.

Grant ID: 28533  
 Status: Open - Draft

Project Title: test  
 Fund Announcement: [School Safety and Security Commit](#)

[Remain](#)

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**RECIPIENT AGENCY DETAILS**

Agency Name: Test Agency  
 Federal ID Number:  
 Preferred Contact Method: Mail  
 Agency Type: Educational (Not SSHE)  
 DUNS Number:  
 Faith Based Agency: No  
 ORI Number:  
 Funding Agency: N  
 Email Address:  
 Fiscal Year Ending (last day of):  
 US Congressional District:

Last Update By: Mr. Chris Epoca  
 Last Update Date: 9/24/2018 2:52:00 PM  
 Status: Y

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**Address Listing**

pes/Labels , Test Agency, 1 Main St, , Test, Adams, Pennsylvania, 11111, UNITED STATES

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Location	Phone Number	Extension

**Step 6:** This step should only be completed if no search results are found in Step 4. Enter the agency name, change the preferred contact method to Mail and enter the Agency's address. Click Save. Repeat the process starting with step 4 to add additional agencies.

View History Save Delete Cancel

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Agency Name:  Last Update B  
Last Update Dat  
Status: Active

Federal ID Number:

Preferred Contact Method:

Agency Type:

DUNS Number:

Faith Based Agency: \*

**JURIS Number:** JURIS Non-Compliant

ORI Number:

Email Address:

Fiscal Year Ending (last day of):

US Congressional District:  (Ex: PA02)

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**Address List**

Select Delete Envelopes/Labels, Test Agency 2, , 1 Main Street, , Harrisburg, Dauphin, Pennsylvania, 17111, UNITED STATES

Add Phone Number

**Telephone Number Listing**

Location	Phone Number	Extension

View History Save Delete Cancel

**Step 7:** If you added more than one recipient agency, you will see the screen below when you open the Budget Details screen for the first time. Select the appropriate type of budget for each agency and click Save.

**BUDGET SETUP**

**BUDGET SETUP DEFINITIONS**

**Agency Budget** - Provides a separate budget(s) within the Master Budget, allowing specific departments within a county to input their budget line item detail (Agency Budget) separate from the Master Budget. These costs will then be consolidated into the Master Budget categories.

**Pass Through Budget** - Select when funds are being passed through the applicant agency to other organizations or contractors (service providers). Allows for the input of a separate budget, including budget line item details, for these organizations. The total of each Pass Through Budget will be incorporated into the Consultant category of the Master Budget.

Click the Help button in the upper right corner for examples.

Recipient Agency Name	Agency Budget	Pass Through Budget
ABC School District	<input type="radio"/>	<input type="radio"/>
Test Agency	<input checked="" type="radio"/>	<input type="radio"/>

**Step 8:** You will now be able to add budget line items for each recipient agency you established. There will be a link for each recipient agency budget. Click the link for the budget you wish to build and/or modify.

System will time out at: 09:55:58 AM.  
Remaining time: 19:47

Grant ID: 28533      Project Title: test  
 Status: Open - Draft      Fund Announcement: [School Safety and Security Committee](#)

**BUDGET SUMMARY**

Section Point Value: 0      Created By: Mr. Chris Epoca      Created Date: 9/24/2018 2:55:08 PM  
 Completion Status:       Last Update By: Mr. Chris Epoca      Last Update Date: 9/25/2018 9:35:58 AM

BY RECIPIENT AGENCY	YEAR1	YEAR2	TOTAL
<a href="#">ABC School District (Agency Budget)</a>	0.00	0.00	0.00
<a href="#">Test Agency (Agency Budget)</a>	0.00	0.00	0.00
Total:	0.00	0.00	0.00

  

BY CATEGORY	YEAR1	YEAR2	TOTAL
Personnel	0.00	0.00	0.00
Employee Benefits	0.00	0.00	0.00
Travel (Including Training)	0.00	0.00	0.00
Equipment	0.00	0.00	0.00
Supplies & Operating Expenses	0.00	0.00	0.00