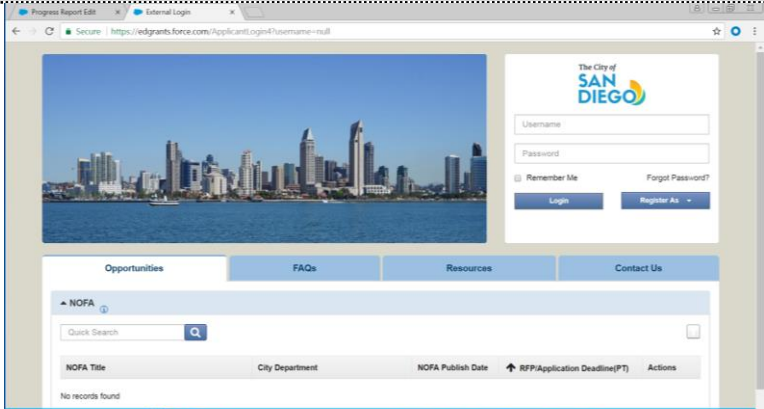
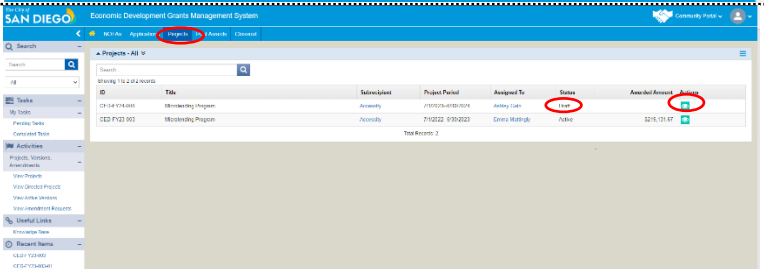
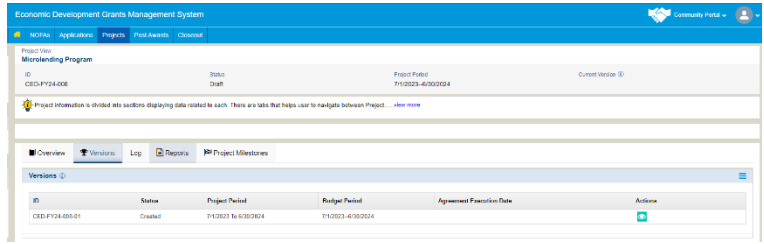
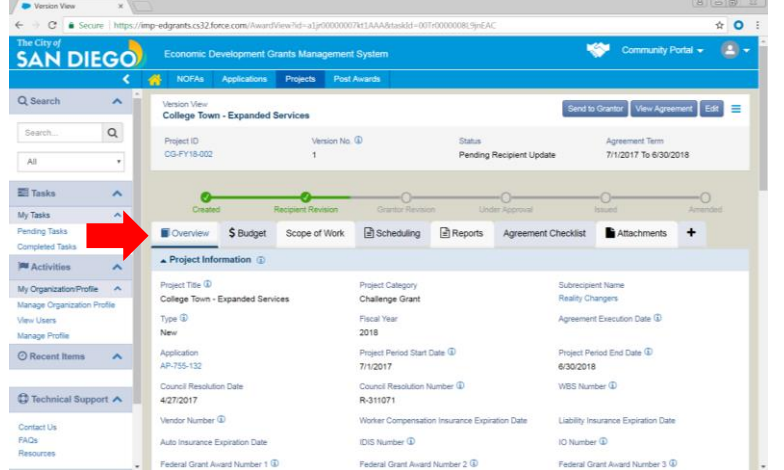
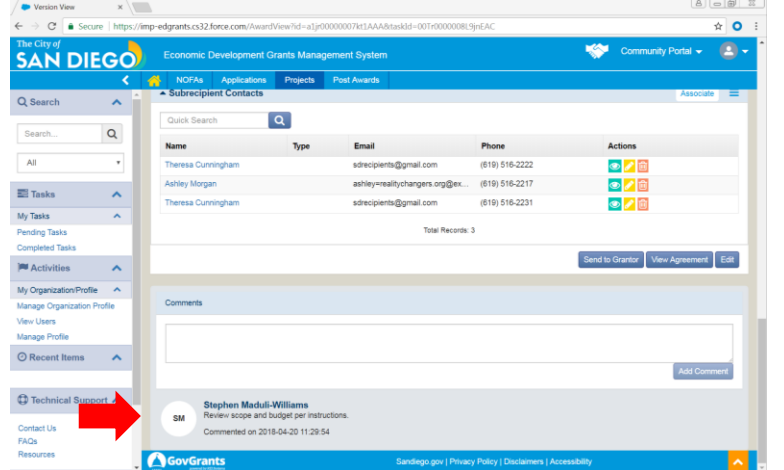
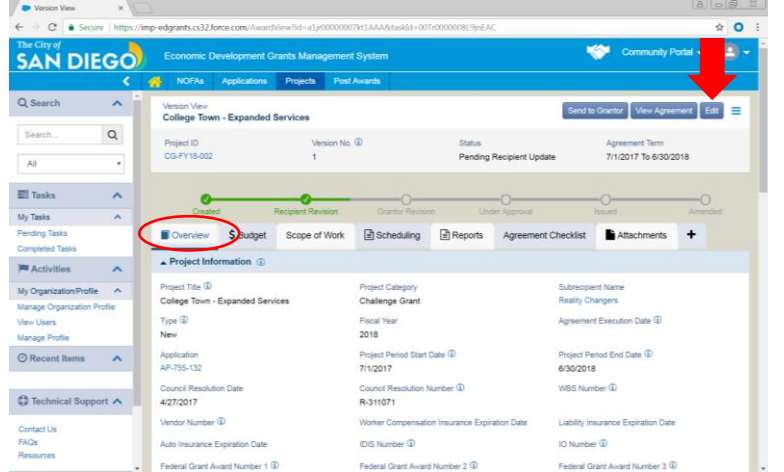


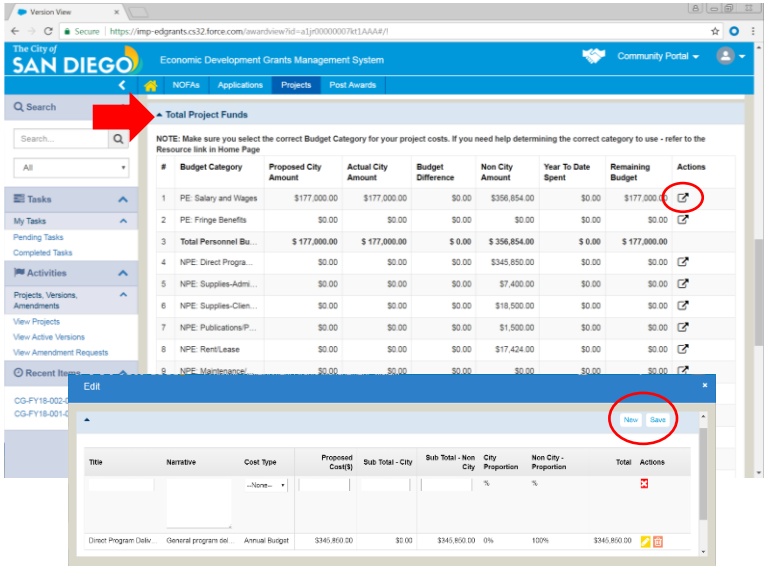
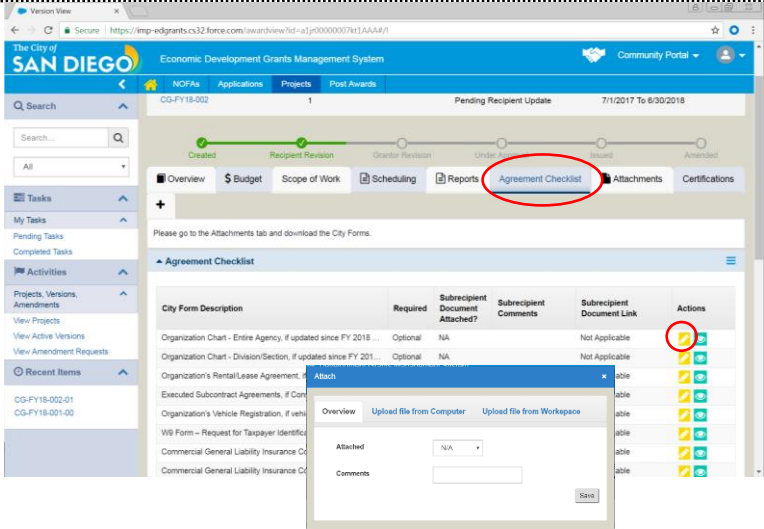
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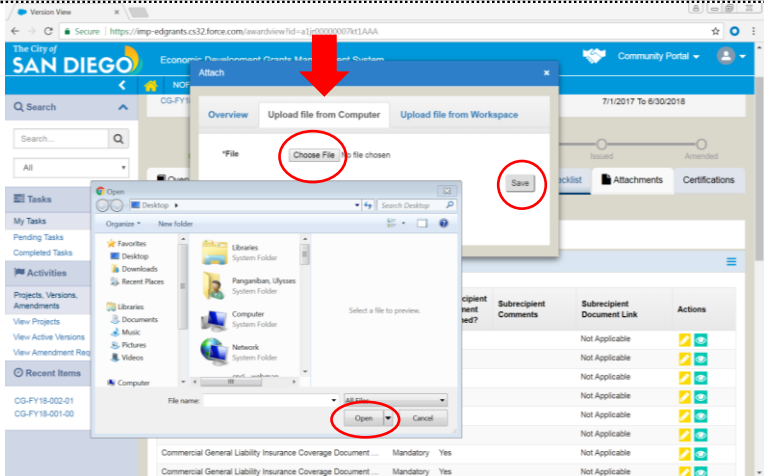
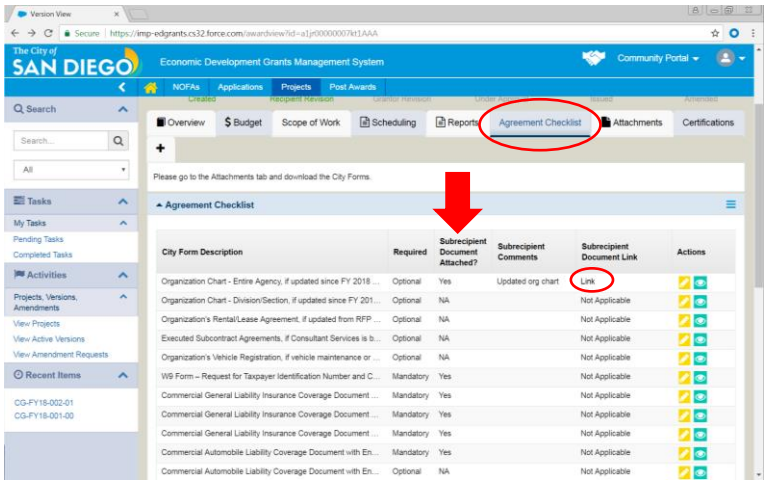
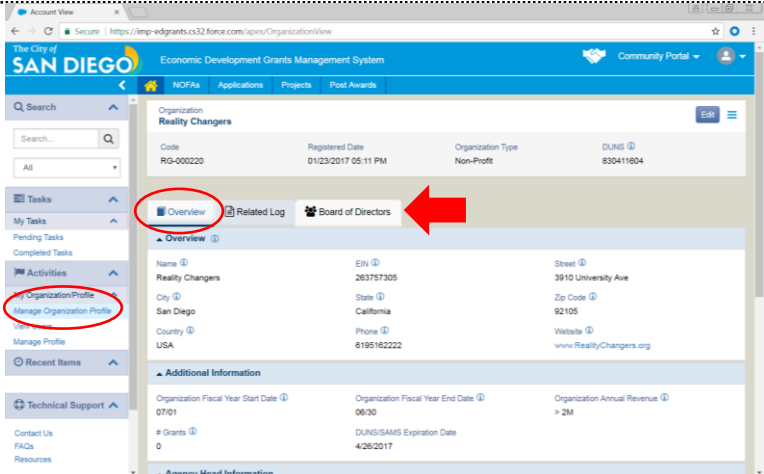
- How to review and edit a draft CDBG agreement in ED Grants
- How to add milestones/tasks and target dates to the project schedule of a draft CDBG agreement in ED Grants
- How to edit your organization’s Board of Directors information in ED Grants
- How to approve (electronically sign) a CDBG agreement in ED Grants

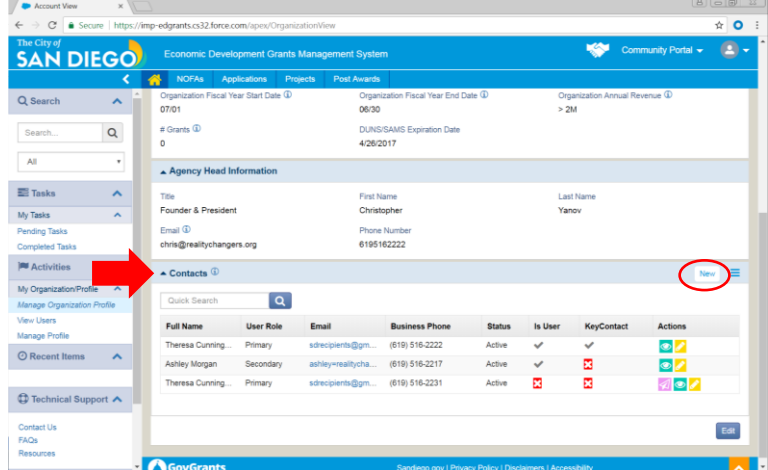
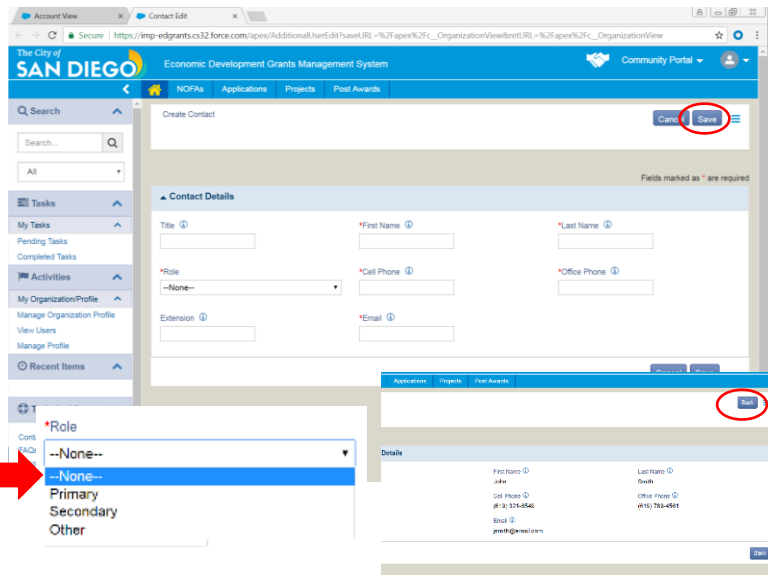
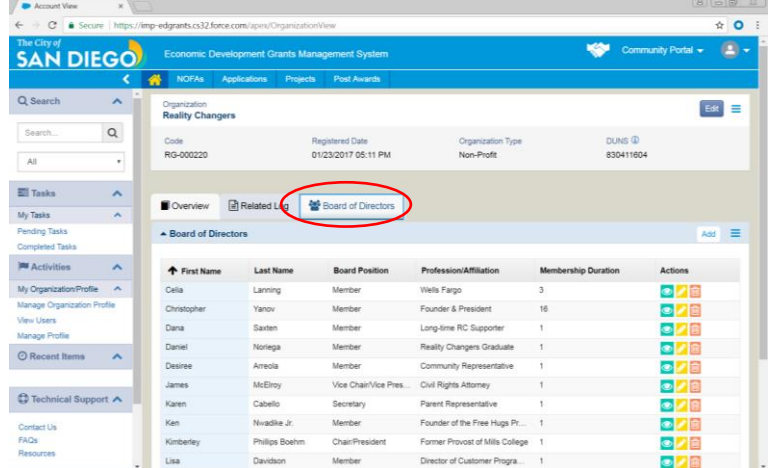
Step	Description	Screenshot
1	<p>Log into ED Grants using the credentials for either the Primary Representative or Secondary Representative of your organization. NOTE: While both the Primary Representative and Secondary Representative are able to work on the draft CDBG agreement, only the Primary Representative will be able to officially approve it and send the draft back to the City. ED Grants is optimized to function using the Google Chrome browser.</p>	
2	<p>Go to the ‘Projects’ tab. Look for the project containing ‘Draft’ in the ‘Status’ column. Click on the corresponding eyeball icon (👁️) under the ‘Actions’ column to open it.</p>	
3	<p>Go to the ‘Versions’ tab. Look for the project containing ‘Created’ in the ‘Status’ column. Click on the corresponding eyeball icon (👁️) under the ‘Actions’ column to open it.</p>	

Step	Description	Screenshot
4	<p>You should now see the draft agreement in view mode only with the following tabs: 'Overview,' 'Budget,' 'Scope of Work,' 'Scheduling,' 'Agreement Checklist,' 'Attachments,' 'Certifications,' and 'Project Milestones.' Click on each tab to review the content for accuracy.</p>	
5	<p>Scroll to the bottom of the agreement and look for the 'Comments' field and log. Review any comments and instructions provided by your assigned City project manager.</p>	
6	<p>Scroll back to the top of the agreement and click on the 'Overview' tab to display its fields. Next, click on the 'Edit' button near the top-right corner to open the fields you can populate. These fields include the insurance expiration dates in the 'Project Information' section and the project location fields in the 'Subrecipient Information' section.</p>	

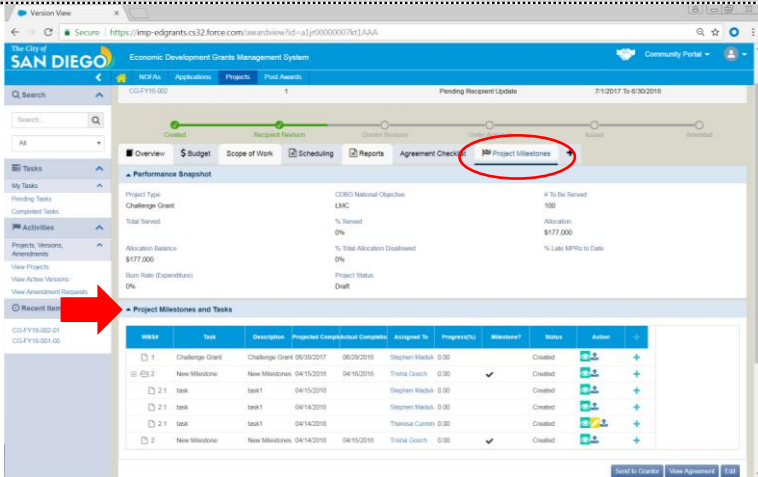
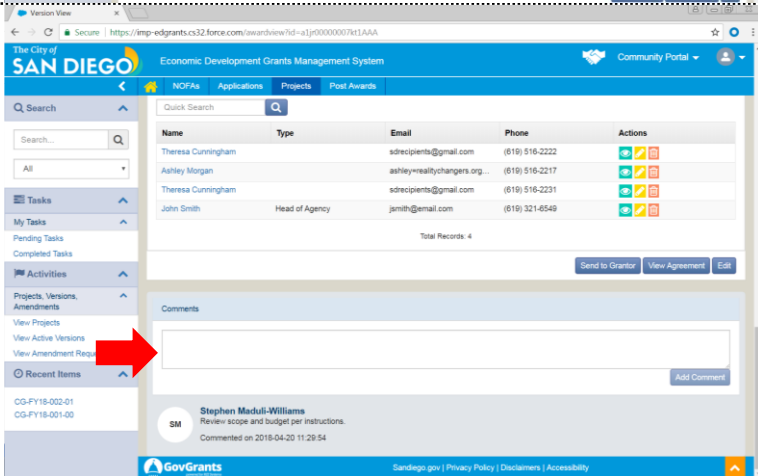
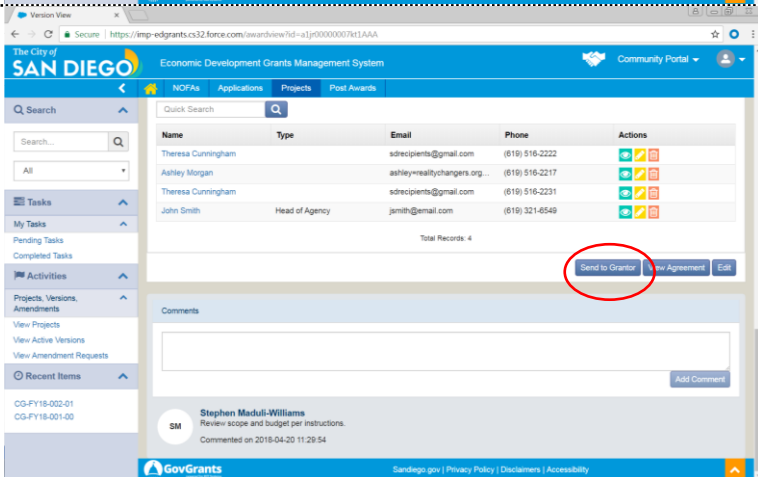
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7	<p>Populate the open fields with the correct information and then click on the 'Save' button near the top-right corner to preserve your work.</p>																																																																	
8	<p>While still in the 'Overview' tab, scroll to the 'Project Locations' section. You will need to enter at least one site where your organization's project will be implemented or constructed. Click on the 'New' button to open a line and populate the fields. When finished, click on the 'Save' button to preserve your work. Repeat this step as many times as necessary to enter all the project sites. NOTE: For single-family housing rehabilitation (SHR) projects, each house to be rehabilitated should be entered as its own line.</p>																																																																	
9	<p>Scroll back to the top of the agreement and click on the 'Budget' tab to display its fields. You may modify the 'Total Project Budget Information by Funding Sources' section by adding new funding sources only, if needed. Click on the 'New' button to add a new funding source line and populate the fields. Click on the 'Save' button to preserve your work. NOTE: Any other modifications without prior City authorization will be rejected by City staff.</p>	<table border="1"> <thead> <tr> <th>Sequence</th> <th>Funding Source Name</th> <th>Amount Secured</th> <th>Amount Unsecured</th> <th>% of Total Budget</th> <th>City Total</th> <th>Non City Total</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>City of San Diego FY ...</td> <td>\$0.00</td> <td>\$177,000.00</td> <td>18.94</td> <td>\$177,000.00</td> <td>\$0.00</td> <td>[Icons]</td> </tr> <tr> <td>2</td> <td>AT&T</td> <td>\$240,000.00</td> <td>\$0.00</td> <td>25.69</td> <td>\$0.00</td> <td>\$240,000.00</td> <td>[Icons]</td> </tr> <tr> <td>3</td> <td>The California Wellne...</td> <td>\$125,000.00</td> <td>\$0.00</td> <td>13.38</td> <td>\$0.00</td> <td>\$125,000.00</td> <td>[Icons]</td> </tr> <tr> <td>4</td> <td>King Philanthropies</td> <td>\$75,000.00</td> <td>\$0.00</td> <td>8.03</td> <td>\$0.00</td> <td>\$75,000.00</td> <td>[Icons]</td> </tr> <tr> <td>5</td> <td>The Dammeyer, Freu...</td> <td>\$71,000.00</td> <td>\$0.00</td> <td>7.6</td> <td>\$0.00</td> <td>\$71,000.00</td> <td>[Icons]</td> </tr> <tr> <td>6</td> <td>The Blumkin, Dum. a...</td> <td>\$30,281.00</td> <td>\$0.00</td> <td>3.24</td> <td>\$0.00</td> <td>\$30,281.00</td> <td>[Icons]</td> </tr> <tr> <td>7</td> <td>Seaworlds</td> <td>\$28,711.00</td> <td>\$0.00</td> <td>2.88</td> <td>\$0.00</td> <td>\$28,711.00</td> <td>[Icons]</td> </tr> </tbody> </table>	Sequence	Funding Source Name	Amount Secured	Amount Unsecured	% of Total Budget	City Total	Non City Total	Actions	1	City of San Diego FY ...	\$0.00	\$177,000.00	18.94	\$177,000.00	\$0.00	[Icons]	2	AT&T	\$240,000.00	\$0.00	25.69	\$0.00	\$240,000.00	[Icons]	3	The California Wellne...	\$125,000.00	\$0.00	13.38	\$0.00	\$125,000.00	[Icons]	4	King Philanthropies	\$75,000.00	\$0.00	8.03	\$0.00	\$75,000.00	[Icons]	5	The Dammeyer, Freu...	\$71,000.00	\$0.00	7.6	\$0.00	\$71,000.00	[Icons]	6	The Blumkin, Dum. a...	\$30,281.00	\$0.00	3.24	\$0.00	\$30,281.00	[Icons]	7	Seaworlds	\$28,711.00	\$0.00	2.88	\$0.00	\$28,711.00	[Icons]
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Step	Description	Screenshot
10	<p>The 'Total Projects Funds' section outlines the anticipated uses of the project funds (both CDBG and non-CDBG). The amounts in the 'Proposed City Amount' column are the same as originally entered in the RFP response. The amounts in the 'Actual City Amount' column and 'Budget Difference' column reflect the modifications to those amounts by City staff and your organization. The amounts in the 'Non-City Amount' column show how much of that line item budget is coming from non-CDBG sources. Click on the arrow icon in the 'Actions' column to modify the corresponding line item's narrative and/or amount. Click on the 'Save' button to preserve your work. NOTE: Any modifications without prior City authorization or counter to City instructions will be rejected by City staff.</p>	 <p>The screenshot shows the 'Total Project Funds' section of the system. A table lists various budget categories with columns for Proposed City Amount, Actual City Amount, Budget Difference, Non City Amount, Year To Date Spent, and Remaining Budget. An 'Actions' column contains arrow icons. A red arrow points to the 'Total Project Funds' tab. A red circle highlights the 'Save' button in the edit popup window.</p>
11	<p>Scroll back to the top of the agreement and click on the 'Agreement Checklist' tab to display its fields. Here you will need to upload the required documents. To upload a document, click on the pencil icon to call up a popup window. In the popup window, click on the 'Overview' tab. For the 'Attached' field, select 'Yes' if you are uploading a document or 'N/A' if you are not. Populate the 'Comments' field with a description of the document or why your organization is not required to upload a document. NOTE: Documents uploaded should be named according to the naming convention found in the Execution Handbook. All items on the list have at least a comment, regardless if they are mandatory or optional.</p>	 <p>The screenshot shows the 'Agreement Checklist' tab selected. It displays a list of items with columns for City Form Description, Required, Subrecipient Document Attached?, Subrecipient Comments, and Subrecipient Document Link. A red circle highlights the 'Agreement Checklist' tab. Another red circle highlights the 'Save' button in the popup window.</p>

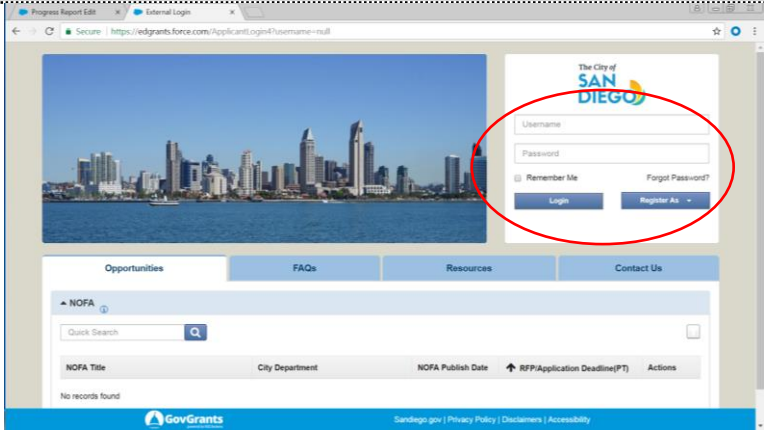
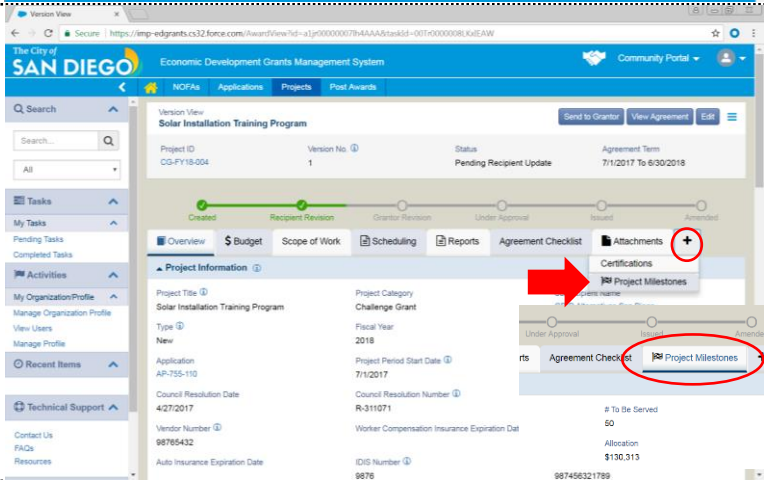
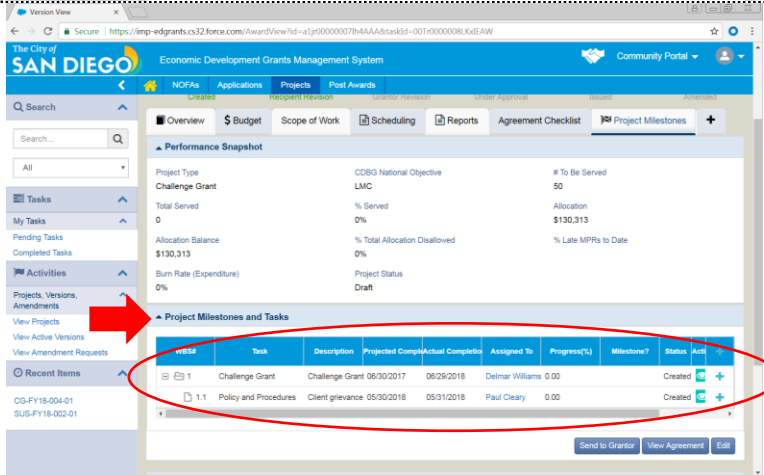
Step	Description	Screenshot
12	<p>In the popup window, click on the 'Upload File from Computer' tab. Click on the 'Choose File' button to navigate to the file you would like to upload from your local computer and then click on the 'Open' button to upload the file to the system. Click on the 'Save' button to complete the task. NOTE: The 'Upload File from Workspace' tab can be used to select from a list of previously uploaded documents that are available for use again.</p>	
13	<p>Review the 'Agreement Checklist' tab once you have uploaded all the required documents. A 'Yes' in the 'Subrecipient Document Attached' column indicates a document has been uploaded to that checklist item, while an 'N/A' indicates no document has been uploaded. To view previously uploaded documents, click on the corresponding 'Link' in the 'Subrecipient Document Link' column. NOTE: If you need to replace a previously uploaded document, you may do so by repeating steps 10 and 11. The system will preserve the previous version in the 'Attachments' tab, but the new version will now be linked to the corresponding checklist item.</p>	
14	<p>To add staff from your organization to the 'Subrecipient Contacts' section of the 'Overview' tab, click on the 'Home' tab (🏠) and then click on 'Manage Organization Profile' along the left side. You should now see the following three tabs: 'Overview,' 'Related Log,' and 'Board of Directors.' Click on the 'Overview' tab.</p>	

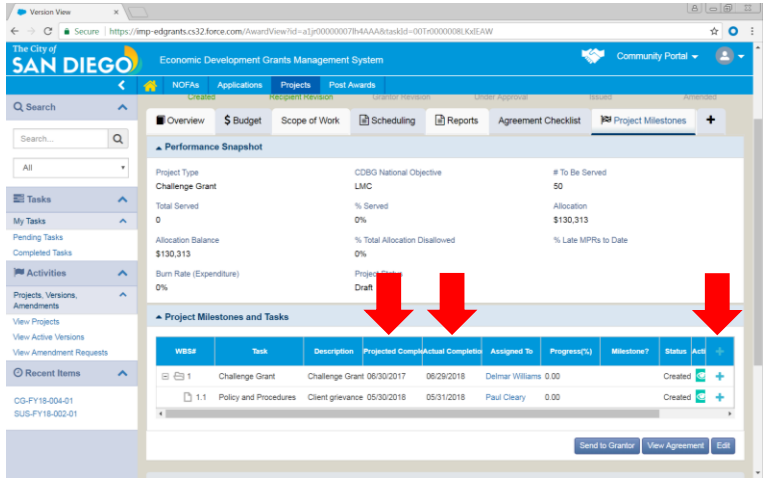
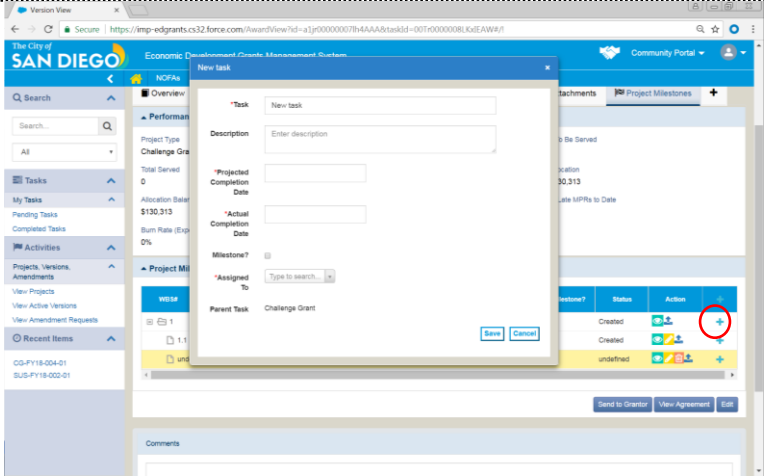
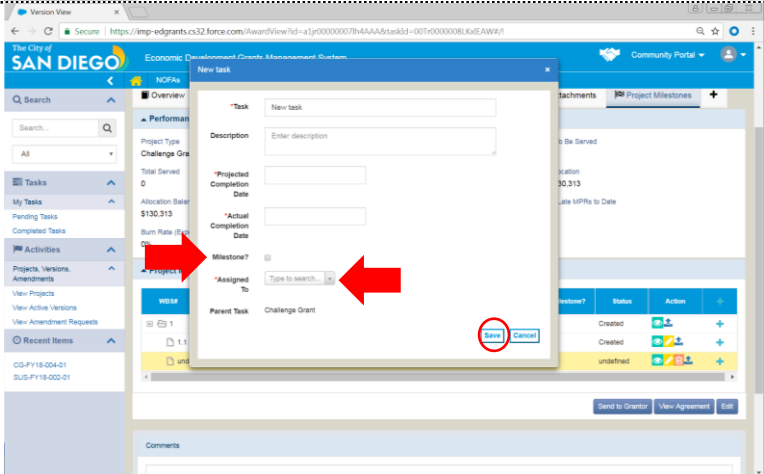
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15	<p>Within the 'Overview' tab, scroll down to the 'Contacts' section. Click on the 'New' button.</p> <p>NOTE: The Primary Representative and the Secondary Representative should already be listed here at the very least.</p>																																																																			
16	<p>ED Grants will open a new screen where you can enter all the details for the new contact. Enter all required information. Fields with a red asterisk are required. Once you are finished, click on the 'Save' button. Click on the 'Back' button to return to the 'Overview' tab of the 'Organization Profile' screen. Do not use your browser's back button. Repeat this step to add as many contacts as needed.</p> <p>NOTE: You can assign a 'Primary' or 'Secondary' role to each new contact. However, there should only be one 'Primary' contact at any given time. All other contacts should be 'Secondary.' Contacts added here cannot be deleted by you. If you need to delete a contact or change the email address after saving, send your request to City staff.</p>																																																																			
17	<p>TIP: While you are on the 'Organization Profile' page, you may also consider reviewing the 'Board of Directors' tab and making any necessary updates since the RFP phase.</p>	 <table border="1"> <thead> <tr> <th>First Name</th> <th>Last Name</th> <th>Board Position</th> <th>Profession/Affiliation</th> <th>Membership Duration</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Celia</td> <td>Lanning</td> <td>Member</td> <td>Wells Fargo</td> <td>3</td> <td>[Icons]</td> </tr> <tr> <td>Christopher</td> <td>Yanov</td> <td>Member</td> <td>Founder & President</td> <td>16</td> <td>[Icons]</td> </tr> <tr> <td>Dana</td> <td>Saxten</td> <td>Member</td> <td>Long-time RC Supporter</td> <td>1</td> <td>[Icons]</td> </tr> <tr> <td>Daniel</td> <td>Noriega</td> <td>Member</td> <td>Reality Changers Graduate</td> <td>1</td> <td>[Icons]</td> </tr> <tr> <td>Desiree</td> <td>Arreola</td> <td>Member</td> <td>Community Representative</td> <td>1</td> <td>[Icons]</td> </tr> <tr> <td>James</td> <td>McElroy</td> <td>Vice Chair/Vice Pres.</td> <td>Civil Rights Attorney</td> <td>1</td> <td>[Icons]</td> </tr> <tr> <td>Karen</td> <td>Cabello</td> <td>Secretary</td> <td>Parent Representative</td> <td>1</td> <td>[Icons]</td> </tr> <tr> <td>Ken</td> <td>Nvadkie Jr.</td> <td>Member</td> <td>Founder of the Free Hugs Pr...</td> <td></td> <td>[Icons]</td> </tr> <tr> <td>Kimberley</td> <td>Phillips Boehm</td> <td>Chair/President</td> <td>Former Provost of Mills College</td> <td>1</td> <td>[Icons]</td> </tr> <tr> <td>Lisa</td> <td>Davidson</td> <td>Member</td> <td>Director of Customer Progra...</td> <td>1</td> <td>[Icons]</td> </tr> </tbody> </table>	First Name	Last Name	Board Position	Profession/Affiliation	Membership Duration	Actions	Celia	Lanning	Member	Wells Fargo	3	[Icons]	Christopher	Yanov	Member	Founder & President	16	[Icons]	Dana	Saxten	Member	Long-time RC Supporter	1	[Icons]	Daniel	Noriega	Member	Reality Changers Graduate	1	[Icons]	Desiree	Arreola	Member	Community Representative	1	[Icons]	James	McElroy	Vice Chair/Vice Pres.	Civil Rights Attorney	1	[Icons]	Karen	Cabello	Secretary	Parent Representative	1	[Icons]	Ken	Nvadkie Jr.	Member	Founder of the Free Hugs Pr...		[Icons]	Kimberley	Phillips Boehm	Chair/President	Former Provost of Mills College	1	[Icons]	Lisa	Davidson	Member	Director of Customer Progra...	1	[Icons]
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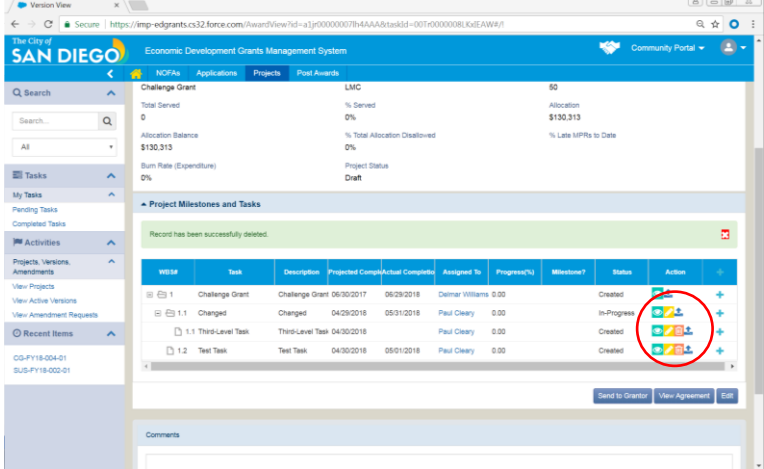
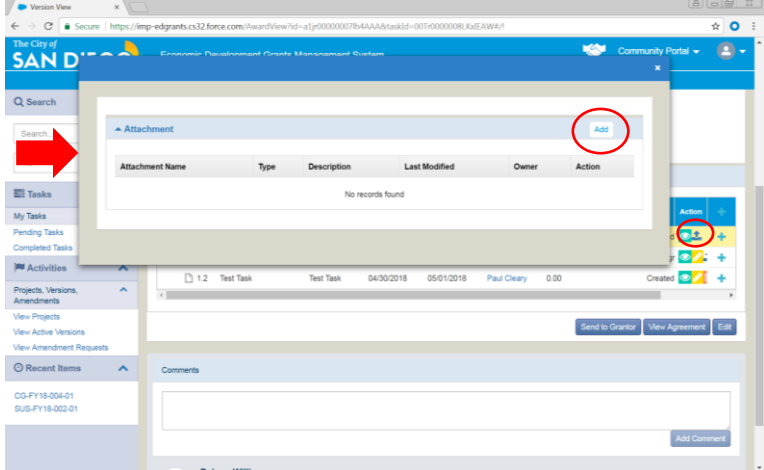
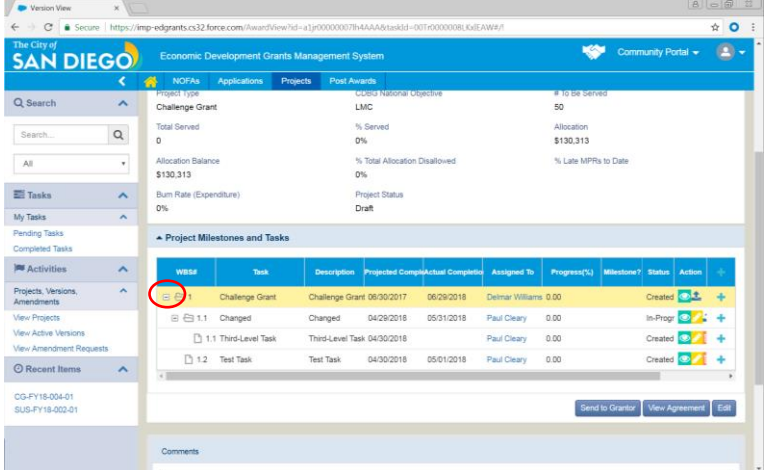
Step	Description	Screenshot
18	<p>Once the new contact(s) have been added to the 'Organization Profile' page, navigate back to the 'Overview' tab of the draft agreement and scroll to the 'Subrecipient Contacts' section.</p>	
19	<p>Click on the 'Associate' button to call up a popup window. In the 'Contact' field, search for and select the contact person's name you would like to associate with the agreement. In the 'Type' field, select the contact's role with regard the agreement. Click on the 'Save' button to complete the association. NOTE: Make sure to indicate a 'Type' for each name already listed in the 'Subrecipient Contacts' section by clicking on the pencil icon corresponding to each name.</p>	
20	<p>Click on the 'Certifications' tab and then click on the 'Edit' button to open the acknowledgement field. The tab lists the laws, regulations, and orders your organization must agree to comply with to receive CDBG funds. They are the same ones incorporated into the CDBG agreement that you may review by clicking on the 'View Agreement' tab. To indicate acknowledgement, click on the check box next to the statement towards the bottom of the screen. Then click on 'Save.' NOTE: If you do not indicate acknowledgement, the system will display an error message upon submission of the draft award back to the City, and the agreement will be precluded from being executed.</p>	

Step	Description	Screenshot
21	<p>Click on the 'Project Milestones' tab and refresh the page to populate the 'Project Milestones and Tasks' section. Follow the steps on how to enter milestones and tasks below to complete this section. NOTE: Consult with your assigned City project manager for any questions on the milestones and tasks.</p>	
22	<p>Once you have completed your review of the draft agreement but before you send it back to the City, you must scroll to the bottom of the agreement and enter a description of the information or modifications you made in the 'Comments' field and any questions you may have for City staff. Click on the 'Add Comment' button to save your entry. NOTE: Comments, once saved, cannot be edited or deleted.</p>	
23	<p>After saving your comments, click on the 'Submit to Grantor' button to return the draft agreement to your assigned City project manager for review.</p>	
24	<p>The above steps may be repeated as many times needed until your assigned City project manager is satisfied with the agreement and all required documents have been uploaded.</p>	<p style="text-align: center;">End</p>

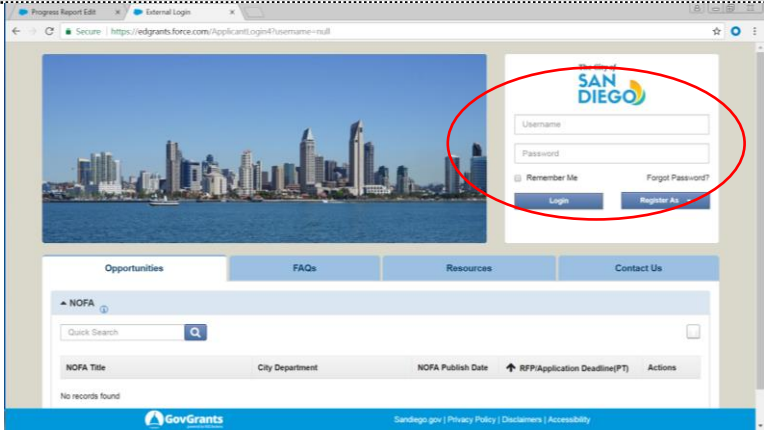
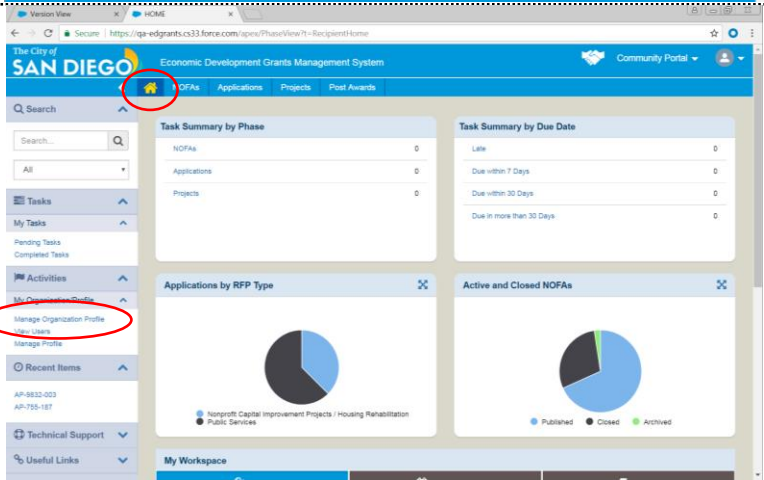
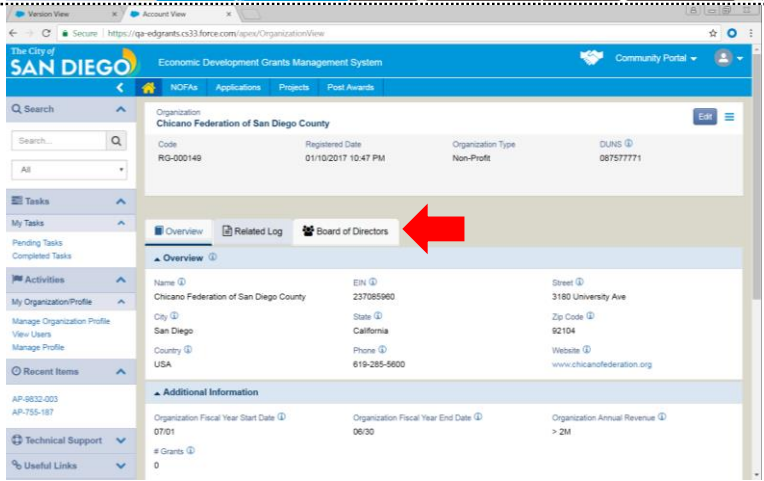
How to add milestones/tasks and target dates into the project schedule:

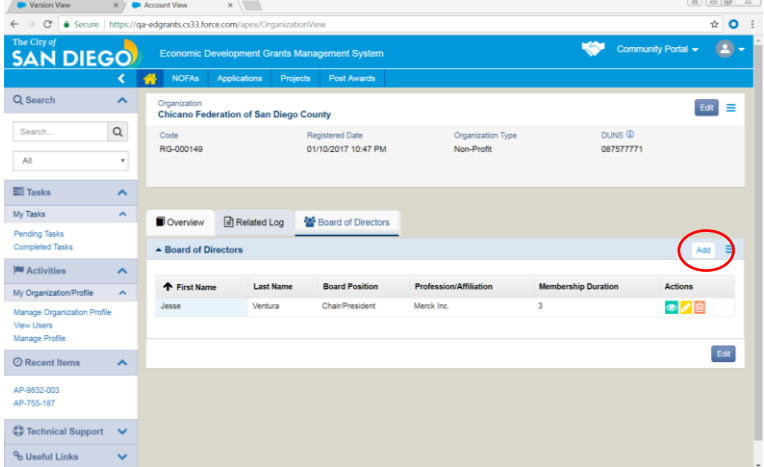
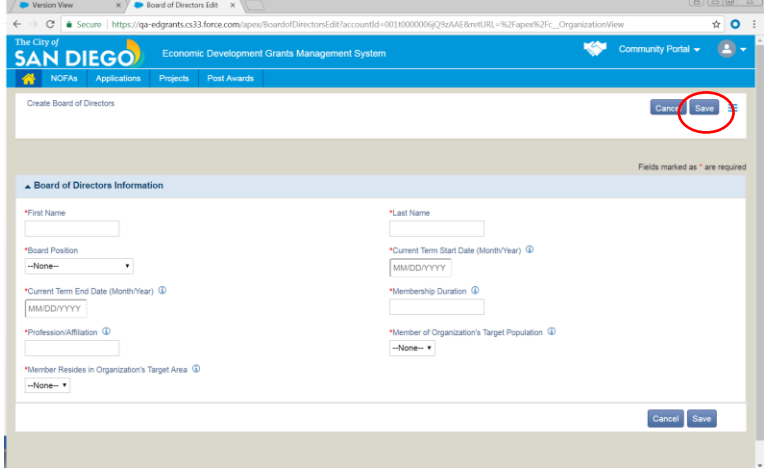
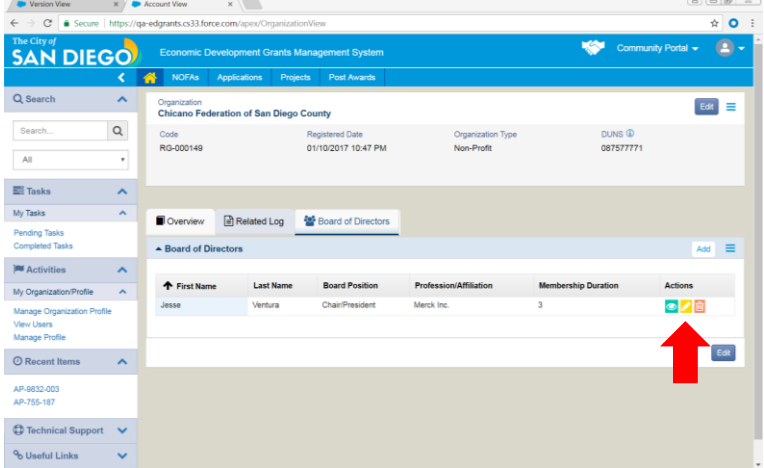
Step	Description	Screenshot																														
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2	<p>Depending on the display size of your screen, you may need to click on the '+' tab to display the 'Project Milestones' tab. Click on the 'Project Milestones' tab when visible.</p>																															
3	<p>Click on your keyboard's F5 button or your browser's refresh icon to activate the milestones and tasks in the 'Project Milestones and Tasks' section. NOTE: If you do not refresh the screen, you will only see a blank box.</p>	 <table border="1" data-bbox="893 1690 1510 1795"> <thead> <tr> <th>ID</th> <th>Task</th> <th>Description</th> <th>Projected Comp</th> <th>Actual Complete</th> <th>Assigned To</th> <th>Progress(%)</th> <th>Milestone?</th> <th>Status</th> <th>Act</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Challenge Grant</td> <td>Challenge Grant</td> <td>06/30/2017</td> <td>06/29/2018</td> <td>Delmar Williams</td> <td>0.00</td> <td></td> <td>Created</td> <td>+</td> </tr> <tr> <td>1.1</td> <td>Policy and Procedures</td> <td>Client grievance</td> <td>05/30/2018</td> <td>05/31/2018</td> <td>Paul Cleary</td> <td>0.00</td> <td></td> <td>Created</td> <td>+</td> </tr> </tbody> </table>	ID	Task	Description	Projected Comp	Actual Complete	Assigned To	Progress(%)	Milestone?	Status	Act	1	Challenge Grant	Challenge Grant	06/30/2017	06/29/2018	Delmar Williams	0.00		Created	+	1.1	Policy and Procedures	Client grievance	05/30/2018	05/31/2018	Paul Cleary	0.00		Created	+
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Step	Description	Screenshot
4	<p>After the refresh, you will see a list of default milestones and tasks listed. Each milestone can be composed of one or more tasks with a projected completion date associated with it. It will be your responsibility during project implementation to track the milestones and tasks and enter a completion date for each one during the appropriate times. You may also upload documents associated with each milestone or task. Your assigned City project manager will be using this tracker to monitor the progress of the implementation of your project. NOTE: You may need to adjust the column widths of the columns of the tracker to view all the columns, including the '+' column to be able to add new milestones and tasks.</p>	
5	<p>Review the default milestones and tasks. If you have any questions or requested edits, contact your assigned City project manager to discuss your question or request prior to making any edits to the tracker. He or she will determine whether or not to authorize any edits. To add a milestone or task, click on the '+' icon in the right-most column to activate a popup window. NOTE: Authorized edits are limited to adding new milestones and tasks and updating the projected completion date of existing ones.</p>	
6	<p>Populate the fields of the popup window. If this is a new milestone, select the 'Milestone?' option; if it is a new task, do not check the option. You may optionally assign a task or milestone to a specific person listed as a project contact in ED Grants. Once you are finished, click on 'Save.' NOTE: New tasks will be filed under the parent milestone or task corresponding to the '+' icon clicked on to activate the popup window.</p>	

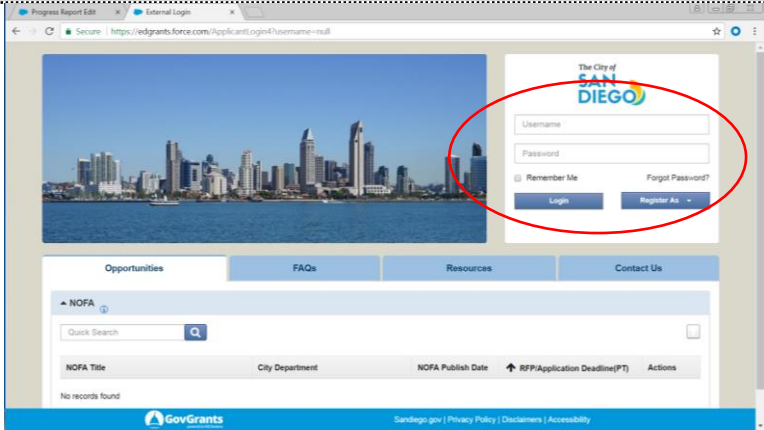
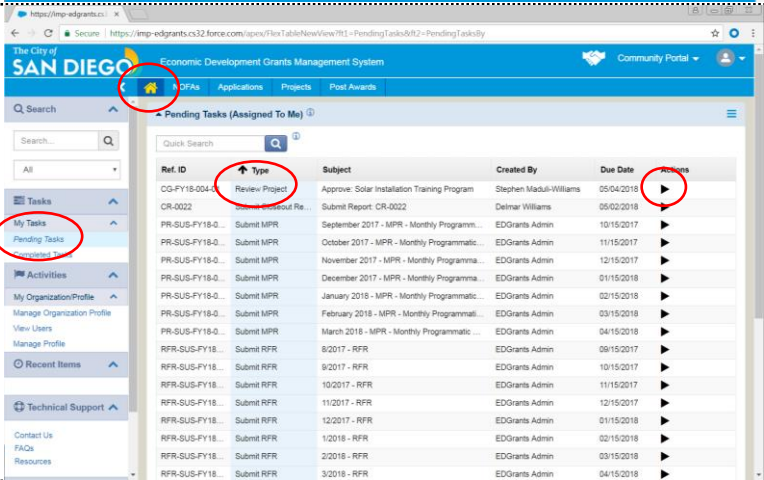
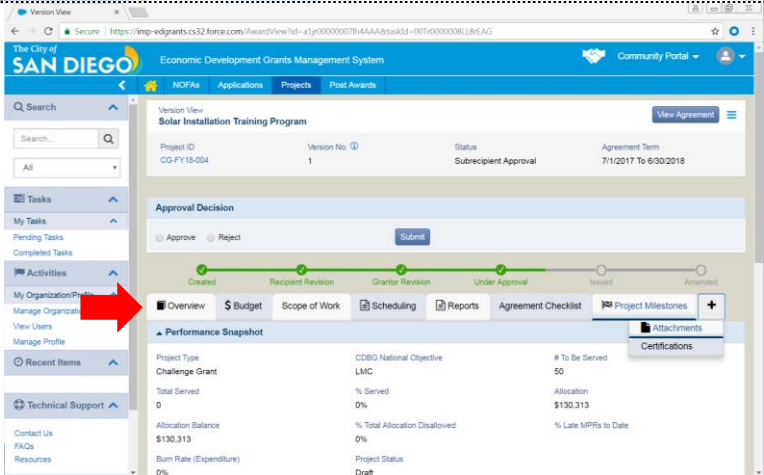
Step	Description	Screenshot
7	<p>You may use the eyeball (👁️), pencil (✎️), or trash (🗑️) icon to view, edit, or delete, respectively, the milestone or task created.</p> <p>NOTE: You can delete only the tasks or milestones that you have created.</p>	
8	<p>You will notice that there is an upward-pointing arrow icon (⬆️) for each milestone and task. Click on this icon to activate a popup window to upload a document associated with that particular milestone or task during project implementation. Click on the 'Add' button and follow the prompts to upload your document.</p>	
9	<p>Repeat steps 6 and 7 above for each authorized milestone or task. Once you are finished, review the tracker, making sure to expand all the folders of the parent milestones and tasks to view their children. The milestones, tasks, and projected completion dates should all together accurately reflect the implementation schedule of your project against which the City can evaluate the progress of the implementation, during which you will be able to enter actual completion dates and, if necessary, upload corresponding documents.</p>	
10	<p>Once the agreement has been executed, only your assigned City project manager will be able to add or delete milestones and tasks.</p>	<p style="text-align: center;">End</p>

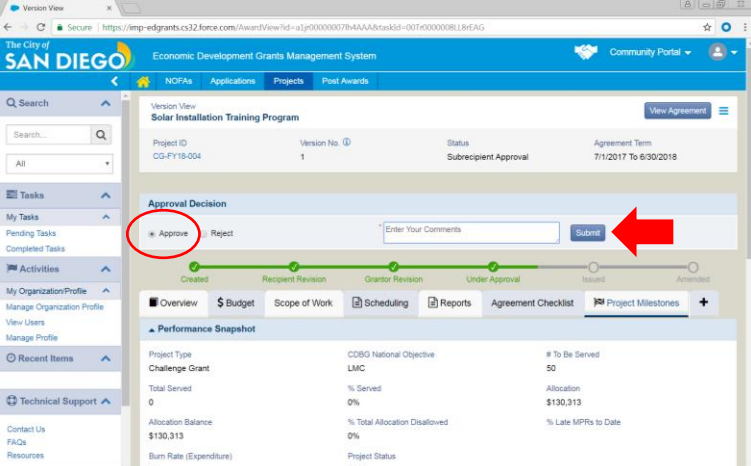
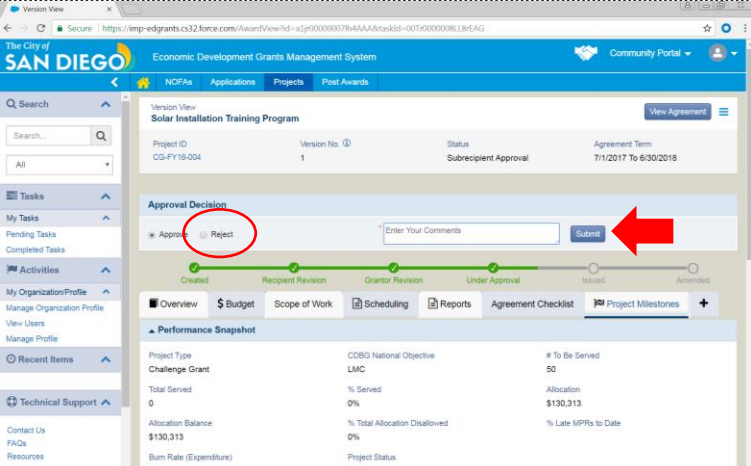
How to edit your organization's Board of Directors information:

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials the Primary Representative of your organization.	
2	Click on the 'Home' tab (🏠) and then click on 'Manage Organization Profile' along the left side.	
3	You should now see three tabs: 'Overview,' 'Related Log,' and 'Board of Directors.' Click on the 'Board of Directors' tab.	

Step	Description	Screenshot
4	Click on the 'Add' button to open a page where the profile of one board member may be entered.	 <p>The screenshot shows the 'Board of Directors' section of the system. A table lists board members, and an 'Add' button is circled in red in the top right corner of the table area.</p>
5	Fill out the fields on the page, using the help text icons provided (i) for guidance and clarification. When you are finished, click on the 'Save' button. Repeat steps 3–5 for each board member until all members have been entered.	 <p>The screenshot shows the 'Create Board of Directors' form. The 'Save' button is circled in red. The form includes fields for First Name, Last Name, Board Position, Current Term Start Date, Current Term End Date, Membership Duration, Profession/Affiliation, and Member of Organization's Target Population.</p>
6	To edit a board member profile previously entered, click on the 'Board of Directors' tab and one of the icons in the 'Actions' column. The trash can icon (🗑️) deletes the entire existing profile from the system. The pencil icon (✎️) opens the profile for editing, after which the 'Save' button should be clicked to preserve the changes. The eyeball icon (👁️) opens the profile for viewing only.	 <p>The screenshot shows the 'Board of Directors' table. A red arrow points to the 'Actions' column, which contains icons for adding, editing, deleting, and viewing a board member.</p>
7	You may update the 'Board of Directors' tab at any time by following the above steps.	<p>End</p>

How to approve (electronically sign) a CDBG agreement in ED Grants:

Step	Description	Screenshot																								
1	<p>Log into http://edgrants.force.com using the credentials for the Primary Representative of your organization. NOTE: While both the Primary Representative and Secondary Representative are able to work on the draft CDBG agreement, only the Primary Representative will be able to officially approve it. ED Grants is optimized to function using the Google Chrome browser.</p>																									
2	<p>Go to the 'Home' tab and then click on 'Pending Tasks' along the left side. Look for 'Review Project' in the 'Type' column and click on the corresponding 'Start' icon (right-pointing arrow) to open it.</p>																									
3	<p>You should now see the final draft agreement in view mode only with the following tabs: 'Overview,' 'Budget,' 'Scope of Work,' 'Scheduling,' 'Reports,' 'Agreement Checklist,' 'Attachments,' 'Certifications,' and 'Project Milestones.' Click on each tab to review the content for accuracy.</p>	 <table border="1" data-bbox="893 1680 1380 1831"> <caption>Performance Snapshot</caption> <thead> <tr> <th>Item</th> <th>Value</th> <th>Target/Status</th> </tr> </thead> <tbody> <tr> <td>Project Type</td> <td>Challenge Grant</td> <td>CDBG National Objective</td> </tr> <tr> <td>Total Served</td> <td>0</td> <td>LMC</td> </tr> <tr> <td>Allocation Balance</td> <td>\$130,313</td> <td># To Be Served: 50</td> </tr> <tr> <td>Burn Rate (Expenditure)</td> <td>0%</td> <td>% Served: 0%</td> </tr> <tr> <td></td> <td></td> <td>Allocation: \$130,313</td> </tr> <tr> <td></td> <td></td> <td>% Total Allocation Disallowed: 0%</td> </tr> <tr> <td></td> <td></td> <td>% Late MPRs to Date: 0%</td> </tr> </tbody> </table>	Item	Value	Target/Status	Project Type	Challenge Grant	CDBG National Objective	Total Served	0	LMC	Allocation Balance	\$130,313	# To Be Served: 50	Burn Rate (Expenditure)	0%	% Served: 0%			Allocation: \$130,313			% Total Allocation Disallowed: 0%			% Late MPRs to Date: 0%
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4	<p>Once the review is complete and the organization is ready to approve the agreement, scroll to the top of the agreement and select 'Approve' in the 'Approval Decision' section. Enter a comment in the text field and then click on the 'Submit' button.</p> <p>Click on the 'View Agreement' button to access a PDF version of the agreement.</p>	
5	<p>If the organization does not want to approve the agreement, select 'Reject' in the 'Approval Decision' section. Enter a comment in the text field explaining why and then click on the 'Submit' button. Doing so will stop the agreement execution process and your organization must reach out to its assigned City project manager for the next steps.</p>	
6	<p>If the agreement is approved, it will be forwarded to the other approvers for their action.</p>	<p>End</p>

For additional support, email CDBG@sandiego.gov or visit the 'Resources' tab at edgrants.force.com.