

# eGrants

The Office of the Governor (OOG) is pleased to announce a new feature in [eGrants](#) to assist with uploading documents into eGrants for one or more projects.

## Requirements

### State Requirement

**ALL** applicants are required to upload the organization's vendor information into eGrants **BEFORE** a grant official will be able to submit your initial application in eGrants.

- For State Agency or Senior University: one form is required - **Texas Payee ID** form
- For All Other Organizations: three forms are required - **Direct Deposit, Texas Payee ID** and **W-9** forms

Most applicants are required to upload other documents to support one or more projects depending on the source of funding and program requirements. All grant officials listed on the **Profile/Details** tab can upload files using this feature.

### Action Required

Grant officials should make note of the application and grant award requirements and make plans for updating the projects at the appropriate time each year.

## eGrants Instructions

For instructions on the new Upload Documents feature, log into eGrants, click the **My.Home** tab, and then expand the topic titled "How Do I Upload a Document to Multiple Projects?".

[Collapse How Do I Upload a Document to Multiple Projects?](#)

### Upload Documents Feature

Complete this section to [upload documents](#) to one or more pending applications and/or active grants in eGrants.

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Most applicants are required to upload other documents to support one or more projects depending on the source of funding and program requirements. All grant officials listed on the **Profile/Details** tab can upload files using this feature.

**Step 1** Check the box next to "Display Upload Documents Feature" to view a list of pending applications and/or active grants available for update

Upload Documents

**Display Upload Documents Feature**  

**Step 2** Select the appropriate "option" from the two types – **Upload Files** or **Grant Vendor**

**Step 3** Select one or more projects from the list

Upload Documents

**Display Upload Documents Feature**

Complete this section to upload documents to one or more pending applications and/or active grants within eGrants.

Upload Files Option

If you choose to upload files - other than banking documents - to one or more projects, the option titled "Other" will be selected by default. Once uploaded successfully, that file will be saved to each project's **Upload.Files** tab.

Grant Vendor Option

If you choose to upload banking files - Direct Deposit, Texas Payee ID, and W9 forms - to one or more projects, select the option titled "Direct Deposit", "Texas Payee ID", or "W9". Once uploaded successfully, that file will be saved to each project's **Grant.Vendor** tab. The forms are available above under the General Information and Instructions area.

Choose file type to upload:

Upload Files Option Grant Vendor Option  
 Other  Direct Deposit  Texas Payee ID  W9

Select One or More Records

Record Count: 46

10 Items per Page Select the number of records to display per page.

Select	Grant #	Type	Current Status	Fund Source	Start Date	End Date	Project Title	Grantee Name	Grant Manager/Email
<input checked="" type="checkbox"/>		Grant	Active Grant[FUND HOLD]	SF	9/1/2017	8/31/2018			<a href="#">Marta Salinas</a>
<input checked="" type="checkbox"/>		Application	Application Pending AO Certification	BG	1/1/2018	1/31/2019			
<input checked="" type="checkbox"/>		Application	Pending OOG Review	HS	10/1/2017	9/30/2018			<a href="#">Daisy Saenz-Rodriguez</a>
<input checked="" type="checkbox"/>		Application	Pending OOG Review[FUND HOLD]	CD	1/1/2018	9/30/2018			<a href="#">Sylvia Garcia</a>

**Step 4** Enter the "Description of the File" you intend to upload when selecting the option titled "Other"; **or** skip this step when selecting any option under **Grant Vendor** type as the description will be filled in automatically – see screenshot below

Choose file type to upload:

Upload Files Option Grant Vendor Option  
 Other  Direct Deposit  Texas Payee ID  W9

Select One or More Records

<input type="checkbox"/>		Application	Pending AO Acceptance of Award	SF	9/1/2017	8/31/2018			<a href="#">Maritza Ramirez</a>
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Enter the Description of the File to be uploaded, then click the Browse button:

Direct Deposit

**Step 5** Click the Choose File (or Browse) button. Browse to the location where that document is stored on your computer or network and click Open to pick that file.

Enter the Description of the File to be uploaded, then click the Browse button:  
Over Summary

When the Name of the File displays in the box below select the Upload button:  
Choose File No file chosen Upload

**Step 6** Click on the Upload button to load this document into each project you selected in an earlier step

Enter the Description of the File to be uploaded, then click the Browse button:  
Overtime Summary

When the Name of the File displays in the box below select the Upload button:  
Choose File Personnel\_OT\_Summary\_v2016-3.xlsm Upload

**Confirmation** Once your file has been uploaded to the **Upload.Files** tab for one or more projects, OOG sends an email notice to the applicable OOG Grant Manager (as listed on your **My.Home** tab).

*Note: The email notice is sent **ONLY** when files are uploaded to the **Upload.Files** tab **AND** the OOG Grant Manager has been assigned, and **NOT** when files are uploaded to the **Grant.Vendor** tab.*

## History of Uploads

Once your file has been uploaded successfully, each project will display that file accordingly – see screenshots below.

### Upload.Files Tab

**Uploaded Documents**

This section displays all of the files that you have uploaded to eGrants to date. To view the contents of your file, click on the link in the 'Click to View' column.

10 Items Per Page ▾ Select the number of records to display per page.

<a href="#">Click to View</a>	<a href="#">File Description</a>	<a href="#">Uploaded By User Name</a>	<a href="#">Date / Time File Uploaded</a>	<a href="#">Size of File</a>
<a href="#">Resolution and Briefing.pdf</a>	Resolution and Briefing		4/27/2016 3:53:13 PM	920670
<a href="#">Audit.pdf</a>	Audit		7/11/2016 1:51:52 PM	1254790
<a href="#">Signed Resolution.pdf</a>	Signed Resolution		8/9/2016 2:09:55 PM	420674

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**Refresh List**

### Profile/Grant.Vendor Tab

**Uploaded Documents**

<a href="#">File Description</a>	<a href="#">Uploaded By User Name</a>	<a href="#">Date / Time File Uploaded</a>	<a href="#">Size of File</a>
Vendor Info: Direct Deposit		2/16/2017 11:47:53 AM	456919
Vendor Info: Texas Payee ID		2/16/2017 11:48:12 AM	446856
Vendor Info: W9		2/16/2017 11:48:28 AM	562511