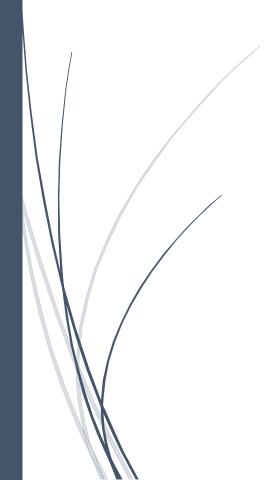


1/24/22

# 2021 GAR User Manual



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# 2021 Grantee Activity Report

# 1. Beginning the Grantee Activity Report

The Legal Services Corporation (LSC) Grantee Activity Report (GAR) is the largest and longest-running data collection effort on civil legal aid in the United States. Since 1976, LSC has recorded and reported data from grantees in a variety of ways. Grantees report these data using automated reporting forms in the LSC Grants online reporting platform each calendar year.

- Calendar Year (CY) 2021 Grantee Activity Reports are due to LSC by March 1, 2022.
- The <u>2021 GAR Guidance Document</u> provides substantive information regarding all the 2021 GAR data submission requirements.
- Users can access the Guidance Manual and additional resources for the 2021 GAR reporting cycle on the <u>Grantee Activity Reports</u> page on the LSC website.

# Updating the Grantee Profile for GAR Reporting

The first step in successfully completing your **Grantee Activity Report** in *GrantEase* is to update this grantee profile and add more details needed to complete the GAR.

This is a very important first step in completing your GAR. In order for LSC to have the most accurate information possible, we ask that users ensure that all data for the organization is up to date as of **December 31 of the GAR year**.

There are two ways for users to locate the Grantee Profile in *GrantEase*. Users should begin by clicking on the **HOME button** in the **2nd Tier Toolbar**. Users will see both **Grantee Profile** and **GAR Report** located under the Activities tab in the **Side Bar**. Users may select either option.



Figure 1: Image of the Home Screen and the Grantee Profile and GAR Report tabs in the Side Bar

Once users select either **Grantee Profile or GAR Report** under the Activities tab, they should select the **Overview tab**.

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Opportunities A	Applications Grants Mo	nitoring Closeout							
Grantee Organization Volunteer Lawyer	s Project of the Boston E	Bar Association							Edit
Status Active		EIN 22-2486215			rantee Number 22007				
Overview	₱ Subgrants & COVID	Other Grant Information	🛃 Oversight	SAR GAR	Attachments	🙅 Collab			
- Anization	Primary Address								
Add Line 1	pr		is Line 2				ston Igit Zip Code Extension		
MA Region		Zip Co					iew on Google Map		
East		USA							
<ul> <li>Organization</li> </ul>	Contact Information								
Organization Email A	Address	Intake	Phone Number 🛈			Sec	ondary Intake Phone Number 🛈		
Organization Phone	Number 🛈	Fax No	imber				anization Website		
State-Wide Website						http	os://vipnet.org		
<ul> <li>Organization</li> </ul>	Description								
Details									
Additional In	formation								
Signing Authority (3) Joanna Allison		Fiscal Year End Date 12/31		L	ast Audit Year		Category Non-Profit Organia	zation	
Organization Service Limited Service	2	Organization Board Committe Audit Committee Finance Committee Combined Audit/Finance							

Figure 2: Image of the Overview tab on the Grantee Profile

#### **Updating Office Information**

Once in the **Overview tab**, begin by scrolling down to the **Offices** section of the Grantee Profile. In this section, users will find each office location that was entered previously (all locations where any work is being conducted). If users do not see offices listed, they must click on the **NEW** button and proceed to add offices (this process is detailed in the Micromodule titled **Grantee Profile**).

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Grantee Organization	pject of the Boston Bar Association								Edi
Status		IN		Gra	antee Number				
Active	2	2-2486215		12	2007				
Overview 🗣 S	Subgrants & COVID	nt Information	rsight 📰 GAR	Attachm	ents 🗬 Collab				
Organization Print	nary Address								
- Organization Con	tact Information								
- Organization Des	aription								
011									
▲ Offices									New
▲ Offices	٩								
Offices     Shot     1 to 4 of 4 record	55								
·		Address	City	State	Phone	Person In Charge	Status	Actions	
Shore 1 to 4 of 4 record	ds	Address	City Boston	State MA	Phone	Person In Charge	Status Active	Actions	
Shop 1 to 4 of 4 record Office Number	ds Office Name ↑	Address test street	_		Phone	Person In Charge			
Should to 4 of 4 record Office Number	ds Office Name 🛧 Eastern Region Legal Intake		Boston	МА	Phone	Person In Charge	Active	• /	New
Show 1 to 4 of 4 record Office Number 03 01	ds Office Name ↑ Eastern Region Legal Intake Test Office	test street	Boston Test City	MA	Phone	Person In Charge	Active	•/	
Shop 1 to 4 of 4 record Office Number 03 01 04	ds Office Name ★ Eastern Region Legal Intake Test Office Test Office Volunteer Laywar's Project of	test street	Boston Test City Washing	MA AZ DC		Person in Charge	Active Active Active	•/ •/	
Shop 1 to 4 of 4 record Office Number 03 01 04	ds Office Name ★ Eastern Region Legal Intake Test Office Test Office Volunteer Laywar's Project of	test street	Boston Test City Washing	MA AZ DC MA		Person in Charge	Active Active Active	•/ •/	لتحصا
Shop 1 to 4 of 4 record Office Number 03 01 04	ds Office Name ★ Eastern Region Legal Intake Test Office Test Office Volunteer Laywar's Project of	test street	Boston Test City Washing	MA AZ DC MA		Person in Charge	Active Active Active	•/ •/	New

Figure 3: Image of the Offices Section of the Grantee Profile and the New Button

**NOTE:** The section lists the names and locations of all offices, office open and close dates, and the name, contact, and regular full-time working hours for the supervisor of each office. Existing fields should be updated if they contain information that is no longer relevant or accurate.

- If a grantee received funding for the first time in the current GAR reporting year, the office information will not be in **GrantEase**. In such cases, the grantee must create and complete a new office entry.
- If a grantee received funding for an additional service area for the first time during the GAR reporting year, the grantee should add any relevant office information for the acquired service area.

To edit office and staffing details for an existing office that are new to the *GrantEase* system, users must click on the **blue pencil icon** next to <u>each</u> office location and complete the following fields in the *GrantEase* system:

- Office Type, which includes denoting if this is the Main office or Branch office
  - All grantee organizations must submit <u>ONE</u> main office in order to submit the GAR application.
- Person in Charge of that office branch
- Regular Full Time Work Week Hours (for example, 9am -5pm)
- Status (this denotes whether the office is active or inactive)
- Open Date of the office
- Close Date of the office if the status of the office is inactive

(p	Grants Management S	system					As a Grantee 🗸	8-	LEGAL BERVICES CORPORATIO
>	Opportunities Application	ns Grants Monitoring Clos	eout 🕓 🗩						
Q 	Grantee Organization Volunteer Lawyers Project	of the Boston Bar Associatio	'n						Edit
•	Status Active	EIN 22-2486	215		Grantee Number 122007				
Ø	Overview <b>T</b> Grant	s 🖹 Other Grant Informatio	n 🛃 Oversigh	t 🔏 Atta	chments 🛛 🇠 Collab				
	Organization Primary	Address							
	➡ Organization Contact	Information							
	- Additional Information	1							
	- Organization Descript	ion							11
	▲ Offices								New
	Se th	Q							T
	Office Name 🛧	Address	City	State	Phone	Person in Charge	Status	Actions	
	Eastern Region Legal Intake		Boston	MA		Lola Remy, Esq.	Active	۰ ۶	
	Test Office	test street	Test City	AZ		Bob	Active	• 🖉	$\leftarrow$
	Test Office	2534 Test address	Washing	DC		Test Attorney	Active	۲ ک	
	Volunteer Laywer's Project of	f B	Boston	MA		Joanna Allison, Esq.	Active	۰ ۶	
					Total Records: 4				

Figure 4: Image of the Edit Icon on the Offices Section of the Grantee Profile

dit		د
		Save
		* Required for Save 🔒 A Required for Submit
Office Information		
*Office Name Central Support & Alameda County Regional Of	*Office Type Branch Office	*Address Line 1
Address Line 2	*City Oakland	*State CA V
*Zip Code	*Phone Number	*Person In Charge Genevieve Richardson
*Regular Full Time Work Week Hours 37.50	*Status Inactive	*Open Date 11/1/2020
▲ Closed Date 11/17/2020	- <u></u>	
	<b>.</b>	Save

Figure 5: Image of the New Office Location Pop-up Screen

Users should select the **SAVE** button once they enter all new data. Users should <u>repeat</u> this process <u>for each office location</u>.

# 2021 GAR Reporting Guidance

General Reporting Guidance regarding Offices and accompanying definitions can be found in the 2021 GAR Guidance Document.

#### **Updating Staff Contact Information**

Users will then proceed to the Organization Staff Contacts -All section.

<ul> <li>Organization Staff</li> </ul>	Contacts - All ⊗					Down	load Staff Contacts Upload Sta	If Contacts New
	r organization has designa esignation dropdown to id	Ited an individual as the Fiscal Officer. The Fi lentify this individual.	scal Officer is the person who	is primarily responsi	ible for the program's fin	ancial operations.	To make this designation, go to * Records are sorted by La	
Showing 1 to 10 of 45 re	cords							Page 1 of 5 📦
Full Name	Staff Position	Office / Station	Email	Phone	Status ①	Is User ①	Contact ID Number	Actions
Ms. Joanna Allison	Executive Director		jallison@yopmail.com		Active	~	C-0000401	•
Amy Anthony		Volunteer Laywer's Project of Boston Bar Associatio	aanthony@yopmail.com		Active	~	C-0008060	•
William Bean	Deputy Director	Volunteer Laywer's Project of Boston Bar Associatio	wbean@yopmail.com		Invitation Sent	×	C-0001240	• / 0
Stephanie Biggs		Volunteer Laywer's Project of Boston Bar Associatio	sbiggs@yopmail.com		New	×	C-0008043	• 1
Miranda Black	None of the Above	Volunteer Laywer's Project of Boston Bar Associatio	mblack@yopmail.com		New	×	C-0007951	• 1
Cate Brams		Eastern Region Legal Intake	cbrams@yopmail.com		New	ж	C-0001338	• /
Katherine Bryce		Volunteer Laywer's Project of Boston Bar Associatio	kbryce@yopmail.com		New	ж	C-0000990	• 1
Victoria DeLaney		Volunteer Laywer's Project of Boston Bar Associatio	vdelaney@yopmail.com		New	×	C-0007375	•
Derek Di Nardo		Volunteer Laywer's Project of Boston Bar Associatio	ddinardo@yopmail.com		New	×	C-0001344	• 1
Victoria Dorante		Volunteer Laywer's Project of Boston Bar Associatio	vdorante@yopmail.com		New	ж	C-0001363	• 1
Show 10 v Entr	les		Total Reco	rds:45				Page 1 of 5 Det

Figure 6: Image of the Organization Staff Contacts Section of the Grantee Profile

To provide the most detailed and up-to-date information, begin by making sure that <u>ALL</u> staff contact names are present. The 2020 information already exists the *GrantEase* system, but we ask that users verify that all staff rosters are accurate.

**NOTE:** Office Staffing information exists for all grantee offices reported on the prior year's submitted GAR forms. The section lists up-to-date, comprehensive data about grantees' workforces. Existing data fields should be updated if they contain information that is no longer relevant or accurate.

- If a grantee received funding for the first time in the current GAR reporting year, the office staffing information would not be in **GrantEase**. In such cases, the grantee must create and complete a new set of staffing entries.
- If a grantee received funding for an additional service area for the first time during the GAR reporting year, the grantee should add any relevant office staffing information for the acquired service area.

*GrantEase* allows **manual entry** of updates for each staff contact **OR** a **mass upload** of all updates for the organization.

#### **Updating Staff Contacts Using Manual Entry**

Manual updates allow users to edit each staff contact individually within the *GrantEase* system. In the **Organization Staff Contacts** section, users will see titles at the top of each column of the table outlining the information to be provided in that column.

After identifying contact information that needs editing, users should begin the update process by clicking on the **blue pencil icon** next to each staff contact name.

<ul> <li>Organization Staff</li> </ul>	Contacts - All ⊗					Down	oad Staff Contacts Upload Star	ff Contacts New
		ted an individual as the Fiscal Officer. The Fi	iscal Officer is the person who	is primarily respons	ible for the program's fin	ancial operations.	To make this designation, go to	your Grantee Pro
and use the Key Staff D Search	esignation dropdown to id	Q						
- Obaron		4						
							* Records are sorted by Las	
Showing 1 to 10 of 45 re								Page 1 of 5 🙌
Full Name	Staff Position	Office / Station	Email	Phone	Status 🕦	Is User 🕦	Contact ID Number	Actions
Ms. Joanna Allison	Executive Director		jallison@yopmail.com		Active	~	C-0000401	•
Amy Anthony		Volunteer Laywer's Project of Boston Bar Associatio	aanthony@yopmail.com		Active	~	C-0008060	• /
William Bean	Deputy Director	Volunteer Laywer's Project of Boston Bar Associatio	wbean@yopmail.com		Invitation Sent	×	C-0001240	۰ ۶۵
Stephanie Biggs		Volunteer Laywer's Project of Boston Bar Associatio	sbiggs@yopmail.com		New	×	C-0008043	
Miranda Black	None of the Above	Volunteer Laywer's Project of Boston Bar Associatio	mblack@yopmail.com		New	×	C-0007951	•
Cate Brams		Eastern Region Legal Intake	cbrams@yopmail.com		New	×	C-0001338	۰,
Katherine Bryce		Volunteer Laywer's Project of Boston Bar Associatio	kbryce@yopmail.com		New	×	C-0000990	• 1
Victoria DeLaney		Volunteer Laywer's Project of Boston Bar Associatio	vdelaney@yopmail.com		New	×	C-0007375	• /
Derek Di Nardo		Volunteer Laywer's Project of Boston Bar Associatio	ddinardo@yopmail.com		New	×	C-0001344	•
Victoria Dorante		Volunteer Laywer's Project of Boston Bar Associatio	vdorante@yopmail.com		New	×	C-0001363	• /

Figure 7: Image of the Edit Icon on the Organization Staff Contacts Section of the Grantee Profile

A pop-up window should appear. On this screen, users will need to scroll down first to the section labeled "Contact Information." Here, they will enter the following information: Birth Year, Gender, Race/Ethnicity, and Language (*see 2021 GAR Guidance Document for relevant definitions*.)

ew Contact			
			Sav
			<ul> <li>Required for Save</li> <li>A Required for Submit</li> </ul>
▲ Contact Information			
Organization	Prefix	<ul> <li>First Name</li> </ul>	Middle Name
Bay Area Legal Aid	None	~	
*Last Name	Suffix	Email	*Phone (1)
	None	~	
*Key Staff Designation	*Role 📵	<ul> <li>Office / Station</li> </ul>	*Birth Year
None	✓None	~	Q
*Gender	*Race / Ethnicity	*Attorney	
None	✓None	✓ O Yes O No	
Language *Languages Available 00 - English 10 - American Sign Langu 11 - Other West Germani 12 - Scandinavian languag 13 - Other Slavic languag 14 - Other Indo-Europear 16 - Other Asian language 17 - Other Pacific Island I	ges es s languages es	Chosen	

Figure 8: Image of the New/Edit Organization Staff Contacts Pop-up Screen

Then, users should complete the two new data entry sections: Employment Details and Experience and Service Areas.

For the first section, **Employment Details and Experience**, please complete all sections (each is marked with an <u>asterisk</u>), including: "Annual Salary," "Hours Per Week," "Annual Other Compensation," "Start Date," "Years of Experience at the Grantee," "Years of Experience at the Job," and the "Years of Professional Experience." As a reminder, if the staff member is no longer working at the organization, please select "**Resigned**" in the **Status box** and put the <u>last date of employment</u> in the field labeled "End Date" (see 2021 GAR Guidance Document for relevant definitions).

16 - Other Asian languages 17 - Other Pacific Island langu	guages S		
18 - African languages			
*Annual Salary	*Hours Per Week	<ul> <li>Annual Other Compensation</li> </ul>	*Start Date
	38.00	10.00	3/25/2019

Figure 9: Image of the Employment Details & Experience Section of the Staff Contacts Pop-up Screen

# Adding New Staff Contacts Manually

After users have updated existing staff contact information, they may begin to add New Staff Contacts to the *GrantEase* system.

To add a new staff contact, users should select the **NEW** button, complete all required fields in the "New Contact" pop-up, and then select the **Save** button.

Þ	Grants Management	System						As a Grantee 🗸	8.	LSC America's I for Equal 3	
-	Opportunities Application	ons Grants Monito	ring Closeout								
1	Organization Staff Co	ontacts - All 🛛 🗧						Download Staff Contacts Up	load Staff Cor	ntacts New	
		as a ensure that your organization has designated an individual as the Fiscal Officer. The Fiscal Officer is the person who is primarily responsible for the program's financial operations. To make this designation, go to your Genetee Profile due the Key Staff Designation dropdown to identify this individual.									
	Showing 1 to 10 of 45 record	*Records are sorted by Ame ascending order									
	Full Name	Staff Position	Office / Station	Email	Phone	Status 🕕	Is	New Staff	f Co	ntacto	
	Ms. Joanna Allison	Executive Director		jallison@yopmail.com		Active	~	New Stan		macis	
L	Amy Anthony	_	Volunteer Laywer's Project of Boston Bar Associatio	aanthony@yopmail.com		Active	~	But	ton		
	Amy Anthony William Bean	Deputy Director	Volunteer Laywer's Project of Boston Bar Associatio	wbean@yopmail.com		Invitation Sent	×	C=0001240			
L	Stephanie Biggs		Volunteer Laywer's Project of Boston Bar Associatio	sbiggs@yopmail.com		New	×	C-0008043		• /	
	Stephanie Biggs Miranda Black	None of the Above		sbiggs@yopmail.com mblack@yopmail.com		New New	×	C-0008043		• /	

Figure 10: Image of the New Button on the Organization Staff Contacts Section of the Grantee Profile

The same information that is required for an existing contact is required for a new contact, so please follow the process covered above.

#### **Updating Staff Contacts Using Mass Upload**

If users have many staff contact updates, they may update staff contact information using a single Excel file upload, which will allow a mass upload of data. Once users have successfully downloaded the Staff Contacts file, they will see titles at the top of each column outlining the information required for that column. Users should update any missing information using their ACMS or internal system.

NOTE: Users must NOT change ANY information in the first two columns (Contact ID, Organization) in the spreadsheet. Please do NOT change the names or the order of any columns in the spreadsheet or add new rows. Doing so will prevent the file from uploading into GrantEase with the updated information. Additionally, users must enter data in the format provided by the file. For example, the date format should be MM/DD/YYYY.

<u>Please do NOT use the upload function to add new staff to *GrantEase*</u>. All new staff should be added to *GrantEase* manually using the process described above. Please only use the upload function to update information for staff with existing *GrantEase* profiles.

*Please see* <u>2021 GAR Guidance Document</u> for more instructions on the specific cell formatting and data entry.

#### **Downloading the Staff Contacts File**

STEP 1: Click the "Download Staff Contacts" button on the upper right side of the screen.

STEP 2: Click on the downloaded file to open it.

<u>STEP 3:</u> After receiving a warning that the file format and extension do not match, click "Yes" to open the file.

Opportunities Applic	ations Grants Monito	ring Closeout									
🔺 Organization Staff Contacts - All 😣 🛛 🕹 Upload Staff Contacts - Upload Staff Contacts - New 🚍											
	Please ensure that your organization has designated an individual as the Fiscal Officer. The Fiscal Officer is the person who is primarily responsible for the program's financial operations. To make this designation, go to your Grantee Profile nod use the Key Staff Designation dropdown to identify this individual.										
Search	angliation troptown to it	Q									
							* Records are sorted by La	st Name ascending			
Showing 1 to 10 of 45 re	Showing 1 to 10 of 45 records							Page 1 of 5 📦			
Full Name	Staff Position	Office / Station	Emai	Download	Staff	s User 🗊	Contact ID Number	Actions			
Ms. Joanna Allison	Executive Director		jallisc	Dowinoau	Staff	-	C-0000401	۲ ک			
Amy Anthony		Volunteer Laywer's Project of Boston Bar Associatio	aanth	Contacts B	Button	~	C-0008060	• 1			
	ony	Volunteer Laywer's Project of Boston Bar	wbeangyopman		mylation Sent	×	C-0001240	۰ ۶ ۵			
William Bean	Deputy Director	Associatio		(one) Let 1111							
	Deputy Director	Associatio Volunteer Laywer's Project of Boston Bar Associatio	sbiggs@yopmail.c		New	×	C-0008043	•			
William Bean	Deputy Director None of the Above	Volunteer Laywer's Project of Boston Bar		zom	New	×	C-0008043 C-0007951	• /			

STEP 4: Enable editing (if that message appears) to begin entering data.

Figure 11: Image of the Download Staff Contacts Button on Staff Contacts Section of the Grantee Profile

William Bean	Deputy Director	Associatio	wbean@yopmail.com	Invitation Sent	×	C+0001240	
Stephanie Biggs		Volunteer Laywer's Project of Boston Bar Associatio	sbiggs@yopmail.com	New	×	C-0008043	• 1
Miranda Black	None of the Above	Volunteer Laywer's Project of Boston Bar Associatio	mblack@yopmail.com	New	ж	C-0007951	۰ ۶
Cate Brams		Eastam Renion Lenal Intake	chrams@woomail.com	New	ж	C-0001338	۰ ج
Katherine Bryce		Downloaded	Staff Contacts	New	×	C-0000990	•
Victoria DeLaney		L D	File	New	×	C-0007375	۰ ک
Derek Di Nardo		Г	ne	New	×	C-0001344	۲ ک
Victoria Dorante		Volunteer Laywer's Project of Boston Bar Associatio	vdorante@yopmail.com	New	×	C-0001363	• /
Show 10 V Entri	65		Total Records:45				Page 1 of 5 >>
Organization Boar	d No.			Export Board Members	Download Te	mplate Upload Organization E	Soard Members New
GovGrants			Terms of Use   Privacy Policy				

Figure 12: Image of the Downloaded Staff Contacts File

Micros	oft Excel
	The file format and extension of 'Staff Upload Template (1).xls' don't match. The file could be corrupted or unsafe. Unless you trust its source, don't open it. Do you want to open it anyway Yes Help

Figure 13: Image of the File Extension Warning from Opening the Excel File

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Figure 14: Image of the Opened Organization Staff Contacts File and the Enable Editing Banner

Users can continue entering data for **EACH** Staff Contact on the <u>same</u> Excel spreadsheet and continually save as they update the missing fields of the form.

**NOTE:** At this time, dropdowns for fields like "Role" and "Language" are not available within the spreadsheet. Users can download the <u>Fields for Staff Contacts Upload</u> file to see a complete list of fields; when updating a field that has many options, users can copy the appropriate value from the file and paste it into the desired cell in their Excel spreadsheet.

After users have updated information for <u>ALL</u> Staff Contacts and saved their completed file, they should go back to the *GrantEase* system and click on the "Upload Staff Contacts" button.

Be sure to double-check updated information and formattin	ng before uploading.
Be sure to abable check apaatea mior mation and for mater	ig servic aproading

Grants Manageme	ent System					an.	As a Grantee 🗸	EQAL SERVICES COP		
A Opportunities Appli	ications Grants Monito	ring Closeout								
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and use the Key Staff Search	Designation dropdown to id	ted an individual as the Fiscal Officer. The Fi entify this individual.	iscal Officer is the person who	o is primarily respon	sible for the program's finar	ncial operations. To		y Last Name ascending or		
Showing 1 to 10 of 45 r	Staff Position	Office / Station	Email	Phone	Unloa	d Staff	t ID Number	Actions		
		Office / Station	Email jallison@yopmail.com	Phone	Uploa	d Staff	t ID Number 401			
Full Name Ms. Joanna Allison Amy Anthony	Staff Position Executive Director	Office / Station Volunteer Laywer's Project of Boston Bar Associatio		Phone	Uploa Contact	d Staff s Butto	<b>t ID Number</b> 401 060	Actions		
Full Name Ms. Joanna Allison	Staff Position Executive Director	Volunteer Laywer's Project of Boston Bar	jallison@yopmail.com	Phone	Uploa Contact	d Staff s Butto	t ID Number 401 060 C-0001240	Actions		
Full Name Ms. Joanna Allison Amy Anthony Amy Anthony	Staff Position Executive Director	Volunteer Laywer's Project of Boston Bar Associatio Volunteer Laywer's Project of Boston Bar	jallison@yopmail.com aanthony@yopmail.com	Phone				Actions () (		

Figure 15: Image of Upload Staff Contacts Button in Staff Contacts Section of Grantee Profile

A pop-up screen will appear. Here, users will have to browse their folders for the saved **Staff Contacts** file.

Uplo	ad Staff Member	×
	Step 1: Instructions	
	Click the "Browse File" button to select the Downloaded Excel Template for Cases (.xlsx or .xls) file on your computer from which you wish to upload data. Once you select the file, please click the "Upload File" button to begin uploading the data.	
	Note : Date Format should be (MM/DD/YYYY)	
	Browse File	
		_

Figure 16: Image of the Organization Staff Contacts Upload Window and Locating the File

Once the file is located (the .XLS version of the file), users will see a **blue notification** that says, "The file has been attached." Users can then click on "**Upload**." The system will intuitively import the data into the correct fields in *GrantEase*.

Uplo	ad Staff Member	×
	Step 1: Instructions	
	Click the "Browse File" button to select the Downloaded Excel Template for Cases (.xlsx or .xls) file on your computer from which you wish to upload data. Once you select the file, please click the "Upload File" button to begin uploading the data.	
	Note : Date Format should be (MM/DD/YYYY)	
	The file has been attached. Click the Upload File button.	
	Browse File Resigned 1.xlsx	]
	Upload File	

Figure 17: Image of a Successfully Attached Organization Staff Contacts File Ready for Uploading

If there are errors (meaning the data was not entered correctly), validation errors will appear. Users can print a list of the validation errors, go back to their Excel spreadsheet, and rectify the errors.

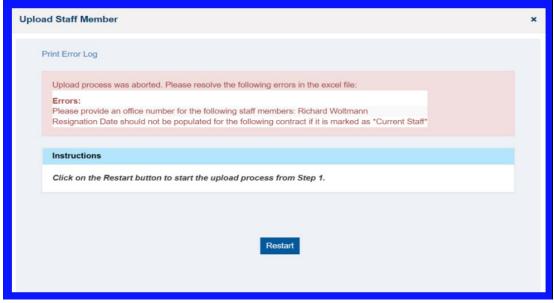


Figure 18: Image of Validation Error Messages for the Excel File and the Print Error Log Link

Users should then go through the process of uploading the file once all errors have successfully been rectified. When the file has been uploaded successfully, users can click on the **"X**" to return to the **Grantee Profile** screen.

Upload Staff Member	×
Success! 158 Rows inserted/updated successfully.	×
Instructions Click on the Continue button to start the upload process from Step 1.	
Continue	

Figure 19: Image of the Successful File Upload Message

Once users have finished with their uploads, they should see the updated information populated in the **Organization Staff Contacts** – **All** section.

#### 2021 GAR Reporting Guidance

General Reporting Guidance regarding Staffing Information and accompanying revised definitions can be found in the <u>2021 GAR Guidance Document</u>.

#### **Updating Subgrantee Organization Information**

After updating ALL staff contact fields, users should move onto the **Subgrantee Organization** section. Here we ask that users check and update all subgrantee office locations, including reviewing the address of the subgrantee and all other required information.

(f)	Grants Manager	nent System					As a Grantee 🗸		LSC America's Partner for Equal Justice LEGAL SERVICES CORPORATION
> "	Opportunities App	olications Grants Mon	itoring Closeout	¢ 🗩					
Q 1	<ul> <li>Subgrantee Org</li> </ul>	anizations							New 🗏
	Search	٩							۲
0	Subgrantee Organization	Subgrantee Address	Subgrantee Email	Subgrantee Primary Phone Number	Subgrantee Intake Phone Number	Subgrantee Website	Subgrantee Fax Number	Status	Actions
0	org x	111 5th , city, SC USA	email@email.c	(666) 666-6666	(555) 555-5555	www.website.com		Active	
	REI Test	REI Test REI Test USA	rei.test@yopm			lsc.gov		Active	1 •
				Tota	I Records: 2				
	▲ Service Areas								Ξ

Figure 20: Image of the Subgrantee Organizations Section of the Grantee Profile and the Edit Icon

Although the Subgrantee Start Date and End Date (*if inactive is selected*) aren't required, LSC would like to have that information.

ubgrant Organization		
		Required for Save     A Required for Save
▲ Subgrantee Information		
*Subgrantee Organization	*Address Line 1	Address Line 2
org x	111 5th	
*City	*State	*Zip Code
city	SC	▶ 22334
*Country	*Subgrantee Primary Phone Number	*Person in Charge
USA	(666) 666-6666	
*Subgrantee Intake Phone Number	*Subgrantee Email	Subgrantee Website
(555) 555-5555	email@email.com	www.website.com
Subgrantee Fax Number	DUNS Number	Subgrant Start Date
		mm/dd/yyyy
Subgrant End Date	*Status	Date Inactivated
mm/dd/yyyy	Inactive	✓ mm/dd/yyyy
Description		
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B I U I. A. M.		

Figure 21: Image of the Edit Subgrantee Organization Pop-up Screen

As a final note, if a subgrantee organization is **NOT** present, please click on the **NEW** button to add that subgrantee organization by filling out the same fields as mentioned above.

ntrease A	pplications Grants Mor	itoring Closeout	¢ 🗩					
▲ Subgrantee Or	ganizations							New
Search	Q							
Subgrantee Organization	Subgrantee Address	Subgrantee Email	Subgrantee Primary Phone Number	Subgrantee Intake Phone Number	Subgrantee Website	Subgrantee Fax Number	Status	Actions
org x	111 5th , city, SC USA	email@email.c	(666) 666-6666	(555) 555-5555	www.website.com		Active	s 🔹
REI Test	REI Test REI Test USA	rei.test@yopm			lsc.gov		Active	s 🕐

Figure 22: Image of the New Button on the Subgrantee Organizations Section of the Grantee Profile

# 2. Staff Case Services (and PAI Case Services if applicable)

#### Accessing the GAR

There are two ways for users to access the GAR in *GrantEase*. Users should begin by clicking on the **HOME button** in the **2nd Tier Toolbar**. Users will see both **Grantee Profile** and **GAR Report** located under the Activities tab in the **Side Bar**. Users may select either option and follow the steps below to access the GAR.

Search -	Task Summary By Phase		Task Summary By Due Date		My Feed	
aarchQ dl Tasks y Taska	Opportunities Applications Grants Monitoring	0 8 2 73	Late Due within 7 Days Due within 30 Days Due in more than 30 Days	80 0 4	AP-162 — Joanna Allison (Partner) Amy AnthonyHill Commet - Like - Hovember 13, 2020 at 3.01 AP-162 — Amy Acthory (Partner)	
ending Tasks omported Tasks easisign Tasks Activities – genezaron – rantee Profile AR Report Rocontily Viewend –	GAR	Report Tab			One Shekey Sout Does the application in Cannet + Lis - November 13, 2020 at 3 bit Ap-162 — Any Asthony (Partner) Jacros Alson 16 Jo How are you? Connet - Unas - November 13, 2020 at 3 bit You like this.	PM
R-GAR-2214 022 PBIF Transformation 022 PBIF Transformation Uninteer Lawyers Project R-GAR-2214 Uninteer Lawyers Project						
	My Workspace					

Figure 1: Image of the Home Screen and the Grantee Profile and GAR Report Tabs

If users select **GAR Report**, they will be taken directly to the **GAR** tab. If users select **Grantee Profile**, they must then select the **GAR** tab.

GRANTEASE	Grants Managem	ent System						As a Grante		LSC America's Par for Equal Jus
<	Opportunities	Applications Grants	Monitoring Closeout							
Q Search –	Grantee Organization Volunteer Lawyer	s Project of the Bost	on Bar Association							Edit
Search Q	Status Active		EIN 22-2486215		Grantee Nur 122007	mber				
i Tasks –	Overview	₱ Subgrants & COV	ID 🖹 Other Grant Information	🗠 Oversigh 🛛 🛢 G	AR 🗞 Atta	achments 🕯	Collab			
Ay Tasks – Pending Tasks	▲ Grantee Activ	vity Report (GAR) - A	II ¥							Ξ
Completed Tasks	Search		Q	1	Γ 1					۲
Reassign Tasks	Showing 1 to 3 of	3 records								
Activities –	EGMS ID	Schedule Name	Performance Period Start Date †	Performance P	Ind Date	Status	Created Date	Due Date	Date Submitted	Actions
Grantee Profile	PR-GAR-2214	SC-10010	01/01/2021	12/31/2021	_	Created	11/15/2021 9:59 AM	03/01/2022		۲
GAR Report	PR-GAR-2302	SC-10340	11/01/2021	11/30/2021		Created	12/02/2021 12:00 PM	11/24/2022		۲
Recently Viewed -	PR-GAR-2326	SC-10341	12/01/2021	12/31/2021		Created	12/16/2021 12:01 AM	12/25/2022		۲
Volunteer Lawyers Project				Total	Records:3					
Volunteer Lawyers Project PR-GAR-2214										
PR-GAR-2214										_
Volunteer Lawyers Project										Edit

Figure 2: Image of the GAR Tab on the Grantee Profile page

Once on the GAR tab, users will find their respective GAR link(s) organized by the following columns: "Schedule Name," "Performance Period Start Date," "Performance Period End Date," "Status," "Created Date," "Due Date," "Date Submitted," and "Actions."

To simply view the GAR reporting forms without editing, users should click on the **green** eyeball icon.

To begin editing the GAR reporting forms, users should click on the **blue pencil icon** next to the appropriate GAR.

GRANTEASE	Grants Managen	nent System						As a Grantee		America's Partner for Equal Justice
<	A Opportunities	Applications Grants	Monitoring Closeout							
Q Search -	Grantee Organization Volunteer Lawye	rs Project of the Bosto	n Bar Association							Edit
Search Q	Status Active		EIN 22-2486215		Grantee Numbe 122007	r				
📑 Tasks 🛛 –	Cverview	P Subgrants & COVI	D 🗄 Other Grant Information	🛃 Oversight 🛛 🗃 GAR	Attach	ments	Collab			
My Tasks – Pending Tasks	▲ Grantee Act	ivity Report (GAR) - All	*							≡
Completed Tasks	Search		Q							۲
Reassign Tasks	Showing 1 to 3 o	of 3 records								
Organization –	EGMS ID	Schedule Name	Performance Period Start Date 1	Performance Period Er	nd Date	Status	Created Date	Due Date	Date Submitted	Actions
Grantee Profile	PR-GAR-2214	SC-10010	01/01/2021	12/31/2021		Created	Edit	[con		
GAR Report	PR-GAR-2302	SC-10340	11/01/2021	11/30/2021		Created	12/02/2021 12:00 PM	11/24/2022		
Recently Viewed -	PR-GAR-2326	SC-10341	12/01/2021	12/31/2021		Created	12/16/2021 12:01 AM	12/25/2022		
Volunteer Lawyers Project				Total Rec	cords:3		View	Icon	V	
Volunteer Lawyers Project PR-GAR-2214							view	ICOII		
PR-GAR-2214										<b>5</b> .0
Volunteer Lawyers Project										Edit

Figure 3: Image of the GAR Tab of the Grantee Profile and the View and Edit Icons

Once in the GAR, users will see several tabs: *Overview*, *GAR-Staff Case Services*, *GAR-PAI Case Services (if applicable)*, *Other GAR Forms*, and *Collab*.

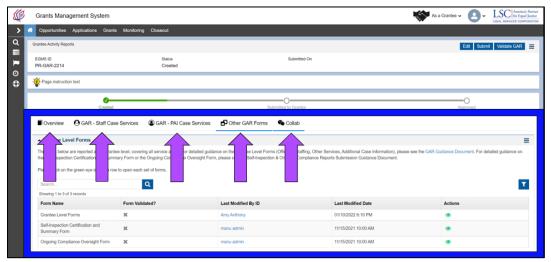


Figure 4: Image of the Grantee Activity Report Tabs

#### The Overview Tab

Begin by reviewing the **Overview tab**. This Overview tab will provide details on the GAR process and components.

As a reminder, the LSC Grantee Activity Report or GAR in the *GrantEase* system consists of a series of forms and sections that collect information at two different levels: Grantee and Service area.

Below the information about the GAR, users will find links to GAR resources and contact information. Users can click on each link to learn more.

(C)	Grants Management System			🐝 As a Grantee 👻 🙆 🖌	LSC America's Partner for Equal Justice
> 1	Opportunities Applications Grants	Monitoring Closeout			
۹ ا	Grantee Activity Reports				Cancel Save
	EGMS ID PR-GAR-2214	Status Created	Submitted On		
•	Page instruction text				
	<b>⊘</b> Creat	led	Submitted to Grantor	Approved	
	Overview Overview Overview	e Services 🕃 GAR - PAI Case Services 🗗 Other G	AR Forms 🛛 🐴 Collab	+ Required to Save	A Required to Submit
		of a series of forms that collect information at two different levels: grant te. Service area-level forms solicit information on Expenses, Revenue,	ee and service area. Grantee-level forms solicit information on other services provided Case Bervices, Open Cases, and Demographics each service area—Basic Field, Agricu		
			manual with guidance for navigating and submitting GAR data in GrantEase is <u>here</u> . The be accessed on the <u>Grantee Activity Reports</u> page as well as the <u>LSC Training Landing</u> .		arding all the GAR
	2 A Energianity Asked Calestons (EAC) do	p guidance for submitting data into the GrantEase system. Topics include e available by email from <u>Gathelp@isc.gos</u>	ie updating your Girantee Profile, completing GAR forms in the new system, uploading d a requirements and proteins they have encountered submitting data will be available J.	iata, etc. anuary 22, 2021.	
	Recipient Information				
	Recipient Number: 122007		Year 2021		
	Recipient Name: Volunteer Lawyers Project of the Boston	n Bar Association			
					Cancel Save

Figure 5: Image of the Introduction Section of the Overview Tab and Additional Resource Links for the GAR Reporting Forms

# **GAR-Staff Case Services Tab**

After reviewing the **Overview** tab, users should navigate to the **GAR-Staff Case Services** tab.

The Staff Case Services form allows manual entry of case services data for each service area that grantees receive funding for during the GAR reporting cycle. This tab also allows for an upload of case services data for all the service areas the grantee managed during the GAR reporting cycle for this GAR report.

On the **GAR-Staff Case Services** tab, users will see information about the Staff Case Services Form and the **Staff Cases Services** data section.

(C)	Grants Mana	agement System				1	😽 As a Grantee 🗸 🙆	<ul> <li>LSC America's Partner for Equal Justice</li> <li>LEGAL BERVICES CORPORATION</li> </ul>
> 1	Opportunities	Applications Grants Monitorin	ng Closeout					
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•	Overview	O GAR - Staff Case Services	GAR - PAI Case Services	Other GAR Forms	🌯 Collab			
	problems they ex	perience. Please report all LSC-eligible	grantee staff during calendar year 2021. C cases, regardless of whether they were in Chapter VII of the Handbook. Further guid	supported with any LSC funds.	For problem category and code defin	nitions, please see Chapter IX of the 2		
	First, click on the	plus sign button to the left of a Service	Area name to expand the table. The Staf	ff Case Services data can be up	odated either manually or via bulk up	load.		
			ight side of each row and make the appro- ight corner to save your changes before r			e entered in every field in the row in o	rder to save the changes. When you	are done, please be sure
	finished, save the	template. Return to GrantEase and clic	button in the top right corner of the scree ck the "Upload Cases" button in the top ri w display the same data from the templat	ight corner, then click *Browse F				
		r button on the right side of the screen to e used to change the number of rows ("e	o filter the table by specific criteria. Click entries") displayed at one time.	on any column header to sort th	he column in ascending or descendin	ng order. Use the navigational arrows t	to flip between pages; the dropdown	a in the bottom left corner of
	A Staff Case	Services					Download Templat	e Upload Cases
	Parent Flex Tabl							_
	Search		Q					<b>*</b>
							* Records are sorted by Creat	ted Date ascending order
	Showing 1 to 1	of 1 records						
	Title					Туре		
	Service	Area : MA-11		T-1-	al Records:1	General		
				102	al Poicords: 1			
							Edit	Submit Validate GAR

Figure 6: Image of the Service Areas Listed under the Staff Case Services Tab

In the **Staff Case Services** section, users will see each service area associated with the grantee. Users should click on the plus sign (+) next to each service area to expand each service area.

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<b>₽</b> ⊙		Created		Sut	bmitted to Grantor		Approved	
0	Overview	O GAR - Staff Case Services	GAR - PAI Case Services	Other GAR Forms	🐁 Collab			
	problems they exp	erience. Please report all LSC-eligible		supported with any LSC funds.	. For problem category and code del	ent of legal assistance grantees provide LS initions, please see Chapter IX of the 2008 rice Reporting (CSR).		
	First, click on the p	olus sign button to the left of a Service	Area name to expand the table. The Sta	ff Case Services data can be u	pdated either manually or via bulk u	oload.		
			ght side of each row and make the app ght corner to save your changes before			be entered in every field in the row in order	to save the changes. When you an	e done, please be sure
	finished, save the	template. Return to GrantEase and clic		ight corner, then click *Browse		e and update the data for each problem co le from your computer. Click "Upload" and		
	Use the blue filter I the screen can be		and Icon	h any column header to sort t	the column in ascending or descend	ing order. Use the navigational arrows to flip	p between pages; the dropdown in	the bottom left corner of
	Staff Case S	iervices					Download Template	Upload Cases
	Parent Flex Table		Q					
			4				* Records are sorted by Created	Date ascending order
	Showl	of 1 records						
	ntle					Туре		
	🕀 Service A	rea : MA-11				General		
				To	tal Records:1			
							Edit	Submit Validate GAR

Figure 7: Image of the Expand Icon for a Service Area Listed under the Staff Case Services Tab

Users will see the first <u>ten</u> entries displayed; however, if users would like to view <u>ALL</u> problem code entries on one screen, they should click on the box that says, "Show X number of entries," and select <u>ALL</u>.

		A. Counsel	B. Limit	F. Negot	G. Negot	H. Agency	I(a) Court	I(b) Cou			L. Extensive		
Pre	blem Code	and Advice	Action	Settlement w/o Litig	Settlement w/ Litig	Decision	Decision Uncontested	Decision			Services	Total	Actio
Pro	blem Category : 00 Con	sumer											
01	Bankruptcy/Debt Relief	0	6			0	0	0	0	0	0	0 0	
02 Co	lections/Repossessions	0		5		0	0	0	0	0	0	0 0	
03	Contracts/Warranties	0		🗸 10		0	0	0	0	0	0	0 0	0 🕜
Pri	Collection ctices/Creditor assment	O		20		0	0	0	0	0	0	0 0	•
	Pred. Lending Practices ( Mortgages)	0		50		0	0	0	0	0	0	0 0	0 0
	Loans/Install. Purch. t Collections)	0				0	0	0	0	0	0	0 0	0 /
07	Public Utilities	0		100		0	0	0	0	0	0	0 0	
	Unfair/Deceptive es/Practices (Not Real p.)	C		All		0	0	0	0	0	0	0 0	
09	Oth. Consumer/Finance	/				0	0	0	0	0	0	0 0	
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		o ک		0 0	D	0	0	0	0	0	0	0 0	)
	Show 10 🗸 Entries					Total	Records:79					Page 1 of	18 HH
						Tele10	ecords:1						

Figure 8: Image of Selecting "Display All Entries" on the Staff Case Services Tab

To begin the data entry process, users must decide if they would like to enter their data for EACH service area manually or if they would like to upload an LSC template to enter the data.

Keep in mind *users will still be able to edit any uploaded information manually* if choosing the upload option.

The next section will go through each option and detail the benefits of each data entry method.

#### Manual Case Service Data Entry

If users decide that they would prefer to enter the data manually, they should begin by scrolling through **EACH** applicable problem code.

The columns are organized by

- Problem Category,
- Problem Codes A, B, F, G, H, Ia, Ib, Ic, K, L,
- Total,
- and Actions.

Þ	Gra	ants Manag	ement Syste	m								As a	Grantee 🛩		LEGAL BERVICES C	
	O;	pportunities	Applications C	Frants Monitorin	g Closeout											
	•	Staff Case S	ervices										Download Ten	nplate Up	load Cases	≡
	S	earch			۹							* Records	s are sorted by C	Created Dat		<b>▼</b> order
	5	Showing 1 to 1 o Title	f 1 records								Туре					
	E	Service Ar	ea : MA-11								General					
										* Records a	re sorted by Proble	n Category ascer	nding order, So	rt Order as	cending order	ļ
		Probler	n Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision	I(a) Court Decision Uncontested	I(b) Court Decision Contested	I(c) Court Decision Appeals	K. Other Closure Method	L. Extensive Services	Total	Actions	
		Probler	n Category : 00 C	onsumer									<b>л</b>			1

Figure 9: Image of the Data Entry Columns for the Service Area

To begin entering data, users should click on the **blue pencil icon** next to each problem category. This will open up the data entry fields. Users can then proceed to input their data field by field.

	Title								Туре				
	Service Area : MA-11								General				
								* Records a	e sorted by Proble	n Category ascer	nding order, Sort C	)rder asce	nding
	Problem Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision	I(a) Court Decision Uncontested	I(b) Court Decision Contested	l(c) Court Decision Appeals	K. Other Closure Method	L. Extensive Services	Total	Acti
ľ	Problem Category : 00 Con 01 Bankruptcy/Debt Relief	isumer 0	0	0	0	0	0	0	0	0	0	0	C
	02 Collections/Repossessions	0		0	0			0	0	0	0	7.	0
	03 Contracts/Warranties	0	0	0	0	0	0	0	0	0		0	1
	04 Collection Practices/Creditor Harassment	0	0	0	0	0	0	0	E	dit Icc	on 💿	0	1
	05 Pred. Lending Practices												

Figure 10: Image of the Edit Icon for Manual Data Entry of a Service Area

# 2021 GAR Reporting Guidance

General Reporting Guidance regarding definitions can be found in the 2021 GAR Guidance Document.

# NOTE:

- The system will <u>NOT</u> allow for negative values.
- The system will allow you to enter numbers as large as 99 billion (11 digits), so please be very careful when entering numbers.

Problem Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision
Problem Category : 00 Consur	mer		• •		
01 Bankruptcy/Debt Relief	0			0	0
02 Collections/Repossessions	0	0	0	0	(

Figure 11: Image of Incorrect Data Entered for a Service Area

If users enter a number in error, they should click on the **UNDO icon** to remove the data and start again.

	Title								Type				
Θ	Service Area : MA-11								Genera	si.			
								* Recon	ds are sorted by F	Problem Category	ascending order, Soi		
	Problem Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision	I(a) Court Decision Uncontested	I(b) Court Decision Contested	I(c) Court Decision Appeals		L. Extensive Services	Page 1 o	Actio
	Problem Category : 00 Cor	nsumer											
	01 Bankruptcy/Debt Relief	0	0	0	0	0	0		0	0	0 0	-	( )
	02 Collections/Repossessions	0	0	0	0	0	0		0	0	0	1	Y
	03 Contracts/Warranties	0	0	0	0	0	0		0	0	0	0 0	0 /
	04 Collection Practices/Creditor Harassment	0	0	0	0	0	0	τ	Indo	Icon		0	
	05 Pred. Lending Practices (Not Mortgages)	0	0	0	0	0	0		Jindo	reon	·	0	•
	06 Loans/Install. Purch. (Not Collections)	0	0	0	0	0	0		0	0	0	0	
	07 Public Utilities	0	0	0	0	0	0		0	0	0	0 0	0 🥒
	08 Unfair/Deceptive Sales/Practices (Not Real	0	0	0	0	0	0		0	0	0	0	

Figure 12: Image of the Undo Icon on a Service Area Data Entry Row

Users do not need to enter data if it is not relevant to their case service data. While users are entering data into the entry fields, they should click the **SAVE Button** consistently to avoid losing data. This will ensure no data is lost and allow a user to leave the computer and return to complete the process at a later time.

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*	Oppor	tunities Applications C	Brants Monitorin	g Closeout										
		f Case Services									Dow	mload Template	Ipload Case	Save
	Searc	Flex Table info		۹							* Reco	rds are sorted by Cr	eated Date	asce g order
		Title								Туре				
	Θ	Service Area : MA-11								General				Save
									* Records	are sorted by Proble	em Category aso	ending order, Sort		Save Sutton
L		Problem Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision	I(a) Court Decision Uncontested	I(b) Court Decision Contested	I(c) Court Decision Appeals	K. Other Closure Method	L. Extensive Services	Total	Actions
		Problem Category : 00 C	opsumer											

Figure 13: Image of Selecting the Save Button after Entering Data Manually

When users have finished **ONE** service area, they can downsize that section by clicking on the minus sign (-), then move onto the next service area by expanding it with the plus sign (+) and repeating the data entry process.

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Search		Q																
														* Rec	ords are sort	ed by Cre	ated Date	ascending or
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Title												Type						
( 🗆 ))ervie	ice Area : MA-11											General						
										* Record	ls are	sorted by Proi	blem C	ategory as	scending on	ler, Sort	Order asc	ending order
52	howing 1 to 10 of 70																Page 1 c	H444 81
Pro	oblem Code	Co	ollapse Icon		G. Negot Settlement w/ Litig	H. Age Decisi		I(a) Court Decision Uncontested		I(b) Court Decision Contested		I(c) Court Decision Appeals	0	Cother Closure Method	L. Extension		Total	Actions
Pro	oblem Category : 00 Consu	00	Jinapse															
01	Bankruptcy/Debt Relief		Loon		0	0	0		0		0		0		0	0		0 /
02 Col	lections/Repossessions	1	ICOII		0	D	0		0		0		0		0	0		0 /
03	Contracts/Warranties	0	0	0	(	0	0		0		0		0		0	0		0 /
and the second second	Collection	0	U.	~			0				*							

Figure 14: Image of the Collapse Icon to Minimize a Service Area

# **Uploaded Template for Case Service Data Entry**

If users decide that they would like to use a template to pull from their CMS, then they should follow the next few steps.

Keep in mind one very important note: The service areas will ALL appear on one Excel file.

This means users will see many more rows if they have multiple service areas.

The next section will discuss the two different approaches to downloading and then uploading this template, but first, users should go through the process of downloading the template.

# **Downloading the Template**

<u>STEP 1:</u> Click the "Download Template" button on the upper right side of the screen. STEP 2: Click on the downloaded file to open it.

<u>STEP 3:</u> After receiving a warning that the file format and extension do not match, click "Yes" to open the file.

<u>STEP 4:</u> Enable editing (if that message appears) to begin entering data.

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-	Орр	ortunities Applications Gr	ants Monitorin	g Closeou	đ													
	- St	aff Case Services													Download	Template	Upload	Cases
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	50														_			
		Title Type																
	Θ	Service Area : MA-11											General	1				
		Showing 1 to 10 of 79 record					6 No. 1			Kel Caust			s are sorted by P	Dow	nload But		np	late
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		Problem Code																
		Problem Code	and Advice	Action	w/o Litig		Litig	Decision		Uncontested		Contested	Appeals	Method	Gerrices	e		
		Problem Code Problem Category : 00 Co	and Advice					Decision		Uncontested		Contested	Appeals	Method	Services	5		
			and Advice	Action		0	Litig	Decision	0		0	Contested	Appeals 0	Method	0	0	0	

Figure 15: Image of the Staff Case Services Download Template Button

	ants Monitoring Closeout		
Grantee Activity Reports			Cano
EGMS ID PR-GAR-2214	Statun Created	Submitted On	
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	<b>0</b>	0	0
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To update manually, click on the blue pering on right of bottom right commer to save you to bugdate in blue, pensae click the "Down's to Grantfase and click the "Upload Cases stata from the template file. Use the blue file button on the right side, the number of rows ("terrifies") displayed a Staff Case Services	cil bion on the right side of each now and make the appropriate changes for the pro- ur changes before manylating away from this screen. case Tempetate button in the log right comer of the screen and save the Excet tempe of button in the log right comer, then click "Browse First" to select the saved temps of the screen to their the table by specific citeria. Click on any column header to a direct temp.	oblem code. Please note that data must be entered in every field in plate to your computer. Open the template and update the data for all file from your computer. Click "Upload" and then "Continue". W	each problem code; each cell has a zero entered by default. When you are finished, save the temp en the file has been successfully uploaded, close the pop-up window. The table should now displa
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Figure 16: Image of the Downloaded Staff Case Services Template



Figure 17: Image of Selecting "Yes" on the File Extension Alert Message

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Figure 18: Image of the Opened Staff Case Services Excel Spreadsheet

#### **Completing the Case Services Data Template**

Once users have successfully downloaded the template, they should proceed to open it.

The information that users must enter can be pulled directly from their CMS, and the format should be set up in a duplicative format.

The rows mirror the manual entry fields, including the Service Area in question, the Problem Category, followed by the possible Problem Codes. Be sure not to enter any negative values or use characters other than numbers (e.g., letters or punctuation).

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Figure 19: Image of the Row/Column Labels on the Staff Case Services Excel Spreadsheet

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Figure 20: Image of Multiple Service Areas Listed in the Staff Case Services Excel Spreadsheet

If users do use negative values, *GrantEase* will not be able to upload the file. Again, if there are no cases closed within a certain category, users may leave it blank or type in "0." Users should be sure to check all of the fields in each service area.

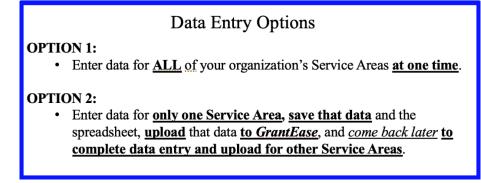


Figure 21: Image of the Data Entry Options for the Staff Case Services Excel Spreadsheet

At this point, once users have entered in data for the first service area, they can either save the file to their desktop using the "**Save As**" function and select from the dropdown options the Excel Workbook format (.XLSX or .XLS)

Save As: StaffCaseServices (1)
Tags:
Where: 📔 Desktop — iCloud 📀 🐱
Online Locations File Forma : Excel 2004 XML Spreadsheet (.xml)
Options
Cancel Save

Figure 22: Image of Save Screen for the Staff Case Services Excel Spreadsheet



Figure 23: Image of the Correct File Formats for Saving the Staff Case Services Excel Spreadsheet

<u>**OR**</u> – Users can *continue entering data for the EACH service area* on the <u>same</u> Excel spreadsheet and follow the same saving steps.

The system will intuitively import the data into the correct service areas in GrantEase.

Once users have either completed one service area or <u>ALL</u> service areas, they should go back to the *GrantEase* system and click on the "Upload Cases" link. This will produce a pop-up screen. Here users will have to browse their folders for the file.

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	LSC-eligible cases, regardless of whether the		losed cases data are the primary measure of the amount and extent of legal assistant adegory and code definitions, please see Chapter IX of the 2008 Edition of the LSC C orting (CSR).	Upload Service Area Data	iase report al he
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		con on the right side of each row and make the approphanges before navigating away from this screen.	priate changes for the problem code. Please note that data must be entered in every t	Button	button in the
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Figure 24: Image of the Upload Service Area Data Button

Upload Staff Case Services	×
Step 1: Instructions	
Click the "Browse File" button to select the Downloaded Excel Template for Cases (.xlsx or .xls) file on your computer from which you wish to upload data. Once you select the file, please click the "Upload File" button to begin uploading the data.	
Browse File	

Figure 25: Image of Browsing for the Staff Case Services Excel File

Once the file is located (the .XLSX or .XLS version of the file), users will see a **blue notification** that says, "The file has been successfully attached." Users can then click on "**Upload**."

Up	load Staff Case Services	×
	Step 1: Instructions	
	Click the "Browse File" button to select the Downloaded Excel Template for Cases (.xlsx or .xls) file on your computer from which you wish to upload data. Once you select the file, please click the "Upload File" button to begin uploading the data.	
	The file has been attached. Click the Upload File button.	
	Browse File StaffCaseServices (1).xls	
	Upload File	

Figure 26: Image of the Attached Staff Case Services Excel File Ready for Upload

If there are errors (meaning the data includes letters or negative values), validation errors will appear. Users can print a list of the validation errors, go back to their Excel spreadsheet, and rectify the errors.

Upload Staff Case Services Print Error Log Upload process was aborted. Please r	Print Validation Error Codes to Review and Correct	×
<b>Errors:</b> Row Number - 2 - Data reported must Row Number - 4 - Data reported must	be numeric value in "A. Counsel and Advice". be numeric value in "G. Negot Settlement w/ Litig". be numeric value in "I(c) Court Decision Appeals".	
Click on the Continue button to star	t the upload process from Step 1.	
	Continue	

Figure 27: Image of Validation Error Messages for the Excel File and the Print Error Link

Users should then go through the process of uploading the file once they have successfully rectified all errors. When the file has been uploaded successfully, users can click on the "X" to return to the main GAR-Staff Case Services screen.

Upload Staff Case Services	×
SuccessI 158 Rows inserted/updated successfully.	×
Click on the Continue button to start the upload process from Step 1.	
Continue	

Figure 28: Image of the Successful File Upload Message

It is imperative that users know that this file <u>IS NOT LOCKED</u>. This means that <u>whatever</u> <u>users enter is what will appear upon uploading the document</u> into *GrantEase*.

#### **BE SURE TO DOUBLE-CHECK EACH DATA ENTRY!**

If users have decided to enter data for each service area one by one, they will need to upload the spreadsheet as many times as they have service areas and <u>ONLY</u> fill out the respective service area (although all service areas will be listed).

\* We recommend that users work with one single document, input data, and return to the same document to input the next service area's data. This should eliminate any confusion. \*

Once users have finished with their uploads, they should click on the SAVE button.

Applications Grants Overview Staff Case Services		Closeout Case Serv		Forms 💊									
	es 🕲 PAI	Case Serv	ices 🗗 GAR	Forms 💊									
Staff Case Services					Collab								
										Download Templ	ate Unio	ad Cases	
										bottmodal tomp	and opion		
Search	Q												
									* Records :	are sorted by Cre	ated Date a	scending o	
								Tupo					
Service Area : CA-1								General					
	A.	в.	F. Negot	G. Negot	н.	I(a) Court	I(b) Court	I(c) Court	K. Other	L.			
Problem Code	and Advice	Limit Action	Settlement w/o Litig	Settlement w/ Litig	Agency Decision	Decision Uncontested	Decision Contested	Decision Appeals	Closure Method	Extensive Services	Total	Actions	
Problem Category : 00 Consum	ner												
01 Bankruptcy/Debt Relief	1	1	1	1	1	1	1	1	1	1	10		
02 Collections/Repossessions	2	2	2	2	2	2	2	2	2	2	20	1	
03 Contracts/Warranties	3	3	3	3	3	3	3	3	3	3	30	ø	
04 Collection Practices/Credi	4	4	4	4	4	4	4	4	4	4	40	1	
05 Pred. Lending Practices (	5	5	5	5	5	5	5	5	5	5	50	1	
06 Loans/Install. Purch. (Not	0	6	6	e	6	6	6	6	6	6	54	ø	
07 Public Utilities	7	7	7	7	7	7	7	7	7	7	70		
08 Unfair/Deceptive Sales/Pr	8	8	8	8	8	8	8	8	8	8	80	1	
09 Oth. Consumer/Finance	9	9	9	g	9	9	9	9	9	9	90	ø	
	01 Bankruptcy/Debt Relief 02 Collections/Repossessions 03 Contracts/Warannies 04 Collection Practices/Credi 05 Pred. Lending Practices ( 05 Leans/Install. Purch. (Not 07 Public Utilities 08 Unfair/Deceptive Sales/Pr	Service Area : CA-1  Froblem Code  A. Counsel  A. Counsel  Counsel	Bervice Area : CA-1       Problem Code     A Counsel advice     B. Limit Action       Problem Category : 00 Consur- Unit Bankruptcy/Dobt Releif     1     11       01 Bankruptcy/Dobt Releif     1     2       02 Collections/Repossessions     2     2       03 Contracts/Warranties     3     3       04 Collections/Ratil: Purch. (Not     0     6       05 Predi. Lending Practices (     5     5       06 Loans/Install: Purch. (Not     0     6       07 Public Utilities     7     7       08 Unflair/Deceptive Sales/Pr     8     8       09 Oth. Consumer/Finance     9     9	Benice Area : CA-1         Problem Code       Acoursel and Action       B. Limit Action       F. Negot Settlement Action         Problem Category : 00 Consumer       B. Limit Action       Settlement Work Litig         Problem Category : 00 Consumer       1       1       1         O1 Bankruptor/Debt Relief       1       1       1       1         102 Collections/Repossesions       2       2       2       2       2       2       2       2       2       2       2       3	Service Area : CA-1         Problem Code       A. Courseil and Advice       B. Limit Action       F. Negot Settlement w/ Litig       G. Negot Settlement w/ Litig         Problem Category : 00 Consumer       1       1       1       1       1       1       2	Service Area : CA-1         Problem Code       A Consel and Advice       B Limit Advice       F. Negot Settlement work Litig       G. Negot Settlement work Litig       H Agency work Litig         Problem Category : 00 Consumer       1	Benvice Area : CA-1         Problem Code       A. Oranel and Advice       F. Negot Advice       G. Negot Settlement W/ Litig       H. Agency Decision       U(a) Court Decision         Problem Category : 00 Consumer       B. Linit Advice       Settlement W/ Litig       B. Settlement Decision       Uncontested         Problem Category : 00 Consumer       1       1       1       1       1         Of BankrytoryDobt Relief       1       1       1       1       1         O2 ColoncytoryDobt Relief       1       1       1       1       1         O3 Contracts/Warranties       3       3       3       3       3       3         O4 Collocation Practices/Credi       4 <td>Benicica Ana : CA-1         Service Ana : CA-1         Problem Code       A.: and Advice       B.: binit Advice       F. Negot Settlement work Litig       G. Negot Settlement with Litig       H.: Benice Settlement with Litig       H.: Benice Settlement with Litig       Negot Settlement with Litig       H.: Benice Settlement with Litig       Negot Settlement with Litig       G. Negot Settlement with Litig       H.: Benice Settlement with Litig       Negot Settlement With Litig       Magen With Settlement With Litig       Negot Medication With Litig       Negot Medication With Litig       Negot Medication With Litig       Negot Medication With Litig       Magen With Medication With Litig       Negot Medication With Litig       Negot Medicatio With Litig       Negot Medicatio W</td> <td>Benice Area : CA-1       General         Service Area : CA-1       General         Problem Code       Acouseil and Active       F. Negot Settlement Model Settlement Wolltig       Alegony Decision Ducontested       Negony Decision Appeals         Problem Code       Acouseil Active       F. Negot Settlement Wolltig       G. Negot Willig       Negony Decision Ducontested       Negony Decision Appeals       Negony Decision Appeals         Problem Category : Do Consumer       I       1       1       1       1       1         Ot BachupchtyObeb Roleid       1       1       1       1       1       1       1         Ot Contructor/Warranies       2</td> <td>Tata       Tata         Service Area : CA-1       General         Service Area :: CA-1       General         Service Area :: CA-1       General         Service Area :: CA-1       Service Area :: CA-1       General         Service Area :: CA-1       Service Area :: CA-1       General         Service Area :: CA-1         Service Area :: CA-1       Service Area :: CA-1       Service Area :: CA-1       Service Area :: CA-1         Problem Code       A.       Service Area :: CA-1       Service Area :: CA-1         Problem Code :: Colspan="4"&gt;Service Area :: Colspan="4"&gt;Service A</td> <td>Taka         Service Area : CA-1       General         Service Area : CA-1       General         Problem Code       A. </td> <td>Genice Area: CA-1         Genice Area: CA-1         Genice Area: CA-1         Genice Area: CA-1         Genice Area: CA-1         Freedow Area: CA-1       Contract: CA-1       Contract: CA-1       Contract: CA-1         Freedow Area: CA-1       Contract: CA-1       CA-1       Contract: CA-1       Contract: CA-1        CA-1       <th colsp<="" td=""></th></td>	Benicica Ana : CA-1         Service Ana : CA-1         Problem Code       A.: and Advice       B.: binit Advice       F. Negot Settlement work Litig       G. Negot Settlement with Litig       H.: Benice Settlement with Litig       H.: Benice Settlement with Litig       Negot Settlement with Litig       H.: Benice Settlement with Litig       Negot Settlement with Litig       G. Negot Settlement with Litig       H.: Benice Settlement with Litig       Negot Settlement With Litig       Magen With Settlement With Litig       Negot Medication With Litig       Negot Medication With Litig       Negot Medication With Litig       Negot Medication With Litig       Magen With Medication With Litig       Negot Medication With Litig       Negot Medicatio With Litig       Negot Medicatio W	Benice Area : CA-1       General         Service Area : CA-1       General         Problem Code       Acouseil and Active       F. Negot Settlement Model Settlement Wolltig       Alegony Decision Ducontested       Negony Decision Appeals         Problem Code       Acouseil Active       F. Negot Settlement Wolltig       G. Negot Willig       Negony Decision Ducontested       Negony Decision Appeals       Negony Decision Appeals         Problem Category : Do Consumer       I       1       1       1       1       1         Ot BachupchtyObeb Roleid       1       1       1       1       1       1       1         Ot Contructor/Warranies       2	Tata       Tata         Service Area : CA-1       General         Service Area :: CA-1       General         Service Area :: CA-1       General         Service Area :: CA-1       Service Area :: CA-1       General         Service Area :: CA-1       Service Area :: CA-1       General         Service Area :: CA-1         Service Area :: CA-1       Service Area :: CA-1       Service Area :: CA-1       Service Area :: CA-1         Problem Code       A.       Service Area :: CA-1       Service Area :: CA-1         Problem Code :: Colspan="4">Service Area :: Colspan="4">Service A	Taka         Service Area : CA-1       General         Service Area : CA-1       General         Problem Code       A. 	Genice Area: CA-1         Freedow Area: CA-1       Contract: CA-1       Contract: CA-1       Contract: CA-1         Freedow Area: CA-1       Contract: CA-1       CA-1       Contract: CA-1       Contract: CA-1        CA-1 <th colsp<="" td=""></th>	

Figure 29: Image of Saved Data from the Uploaded Staff Case Services Excel File

Alternatively, users can export data from their case management system as an Excel file, reformat it to match the LSC GAR template, and then upload the data all at once following the same instructions as above.

#### **GAR-PAI** Case Services

If users have a tab entitled **GAR-PAI Case Services**, they will be <u>required to upload the</u> same data as above but for GAR-PAI Case Services.

(C)	Grants Management Sys	stem		As a Grantee - Contraction of the LSC America's Partner
>	Opportunities Applications.	Grants Monitoring Closeout		
ď	Grantee Activity Reports			Edit Submit Validate GAR
	EGMS ID PR-GAR-2214	Status Created	Submitted Ch	
0 ₿	Page instruction text			
		Created	Submitted to Granter	
	Overview OGAR - S	Staff Case Services	s 🗗 Other GAR Forms 🧠 Collab	
	problems they experience. Please Revision. For case closure code of	e report all LSC-eligible cases, regardless of whether they w definitions, please see Chapter VII of the Handbook. Further	<ol> <li>Closed cases data are the primary measure of the amount and extent of legal assist ere supported with any LSC funds. For problem category and code definitions, please guidance is provided in the Frequently Asked Questions for Case Service Reporting (I , even if a few are closed by private attorneys (see CSR Handbook §4.2).</li> </ol>	see Chapter IX of the 2008 Edition of the LSC CSR Handbook, 2017 Cumulative
	First, click on the plus sign button	to the left of a Service Area name to expand the table. The	PAI Case Services data can be updated either manually or via bulk upload.	
		blue pencil icon on the right side of each row and make the a the top right or bottom right corner to save your changes bet	appropriate changes for the problem code. Please note that data must be entered in ev ore navigating away from this screen.	rery field in the row in order to save the changes. When you are done, please be sure
	finished, save the template. Retur		creen and save the Excet template to your computer. Open the template and update th op right comer, then click "Browse Files" to select the saved template file from your complate file.	
		ight side of the screen to filter the table by specific criteria. C e the number of rows ("entries") displayed at one time.	lick on any column header to sort the column in ascending or descending order. Use the	he navigational arrows to flip between pages; the dropdown in the bottom left corner of
	A PAI Case Services			Download Template Upload Cases
	Search	Expand Service A	rea	<b>T</b>
	Showing Mg 1			* Records are sorted by Created Date ascending order
	THE			Туре
	Bervice Area : MA-11			General
	$\sim$		Total Records:1	

Figure 30: Image of the PAI Case Services Tab and Expand Icon

l Op	portunities Applications Gri	ants Monitorin	g Closeout										
	AI Case Services										Download Temp	late Uplo	ad Cases
Se	arch		Q										_
			~							* Record	s are sorted by Cre	eated Date	
_													
	Тібе Түре												
E Service Area : MA-11 General													
	Problem Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision	I(a) Court Decision Uncontested	I(b) Court Decision Contested	I(c) Court Decision Appeals	K. Other Closure Method	L. Extensive Services	Total	Actions
	Problem Code Problem Category : 00 Cor	and Advice							Decision Appeals	Closure Method	Services	Total	Actions
		and Advice		Settlement	Settlement w/		Decision	Decision	Decision Appeals	Closure Method	Services	Total	Actions
	Problem Category : 00 Cor	and Advice		Settlement	Settlement w/		Decision	Decision	Decision Appeals	Closure	Services		Actions
	Problem Category : 00 Cor 01 Bankruptcy/Debt Relief 02	and Advice		Settlement	Settlement w/		Decision	Decision	Decision Appeals	Closure Method	Services		Actions
	Problem Category : 00 Cor 01 Bankruptcy/Debt Relief 02 Collections/Repossessions	and Advice		Settlement	Settlement w/		Decision	Decision	Decision Appeals	Closure Method	Services		Ø
	Problem Category : 00 Cor 01 Bankruptcy/Debt Relief 02 Collections/Repossessions 03 Contracts/Warranties 04 Collection Practiceeu/Creditor	and Advice		Settlement	Settlement w/		Decision	Decision	Decision Appeals	Closure Method	Services		Ø
	Problem Category : 00 Cot 01 Bankruptcy/Debt Relief 02 Collections/Repossessions 03 Contracts/Warrantes 04 Collection Practices/Creditor Harrassmert 05 Pred. Lending Practices	and Advice		Settlement	Settlement w/		Decision	Decision	Decision Appeals	Closure Method	Services		<b>()</b>

Figure 31: Image of the Edit Icon for Manual Data Entry in this Service Area

If users <u>do not</u> see this tab, this is not applicable to their organization. Grantees should repeat the exact same data entry steps for GAR-PAI Case Services as they did for the GAR-Staff Case Services data entry.

When complete, they should select the SAVE button.

5	Grants	Management System									<b>A</b> 8	a Grantee 🗸 🧧		SC Americal for Equa
*	Opport	unities Applications Gra	ants Monitorin	g Closeout										
	🔺 PAI (	ase Services									Dov	mioad Template U	pload Case	Save
	Search	ng 1 to 1 of 1 records		Q							* Reco	rds are sorted by Cr	$\overline{}$	ascending ord
		litle								Type			/	_
	8 :	Service Area : MA-11								General	Sa	ave Bu	ttor	1
									* Records	are sorted by Prob	lem Category as	cending order, Sort		-
		Problem Code	A. Counsel and Advice	B. Limit Action	F. Negot Settlement w/o Litig	G. Negot Settlement w/ Litig	H. Agency Decision	I(a) Court Decision Uncontested	I(b) Court Decision Contested	I(c) Court Decision Appeals	K. Other Closure Method	L. Extensive Services	Total	Actions
		Broblem Category - 00 Cor	eumer											
		01 Bankruptcy/Debt Relief											0	C

Figure 32: Image of Selecting the Save Button for Data Manually Entered into the Service Area

# 3. Grantee Level Forms

#### Navigating to the Grantee Level Forms

To begin the **Grantee Level Forms**, users should click on the **Other GAR Forms** tab. On the **Other GAR Forms** tab, users will see two sections labeled, **Grantee Level Forms** and **Service Area Forms**. Under the Grantee Level Forms section, users will see a list of forms.

This section of the manual outlines the completion of the form titled, Grantee Level Forms.

Grants Management System			As a Grantee 🗸	LISC America's Partner for Equal Justice LEGAL SERVICES CORPORATION
G Opportunities Applications Grants Monitoring Close	seout			
Grantee Organization Volunteer Lawyers Project of the Boston Bar Association	ion			Edit 🚍
Status EIN Active 22-24	486215	Grantee Number 122007		
Overview 🕈 Subgrants & COVID 🗟 Other G	Srant Information 🛛 🗠 Oversight	GAR & Attachments	🕸 Collab	
<ul> <li>Organization Primary Address</li> </ul>				
Address Line 1	Address Line 2	$\uparrow \uparrow$	City Boston	
State MA	Zip Code 02110		4-Digit Zip Code Extension	
Region	Country		View on Google Map	

Figure 1: Image of Navigating to the GAR Forms Tab

To begin the Grantee Level Forms, users should select the **blue pencil icon** to enter the appropriate GAR Report.

nts Managem	ent System						3	As a Grant	•• • •	LEGAL SERVICES CORF
Opportunities	Applications Grants	Monitoring Closeout								
antee Organization										Edit
olunteer Lawye	rs Project of the Bost	ton Bar Association								
Itatus		EIN		0	Grantee Number					
Active		22-2486215		1	122007					
Overview Grantee Acti	T Subgrants & COV		Z Oversight	<b>■</b> GAR		is 🤇	Collab			
	The subgrants & COV     Subgrants & COV     vity Report (GAR) - A		Cversight	<b>≌</b> GAR	Attachment	ts •	Collab			: T
▲ Grantee Acti	vity Report (GAR) - A	II ¥	Cversight	<b>≣</b> GAR		ts (	Collab	Ed	lit Icon	E
▲ Grantee Acti	vity Report (GAR) - A	II ¥		E GAR		ts f	Collab	E C Due Date	lit Icon Date Submittee	
▲ Grantee Acti Search Showing 1 to 3 o	vity Report (GAR) - A	u ≽ Q			Date St					
▲ Grantee Acti Search Showing 1 to 3 o EGMS ID	vity Report (GAR) - A 13 records Schedule Name	II ♥ Q Performance Period Start Date 1	Performanc		Date St Cr	atus	Created Date	Due Date		

Figure 2: Image of the View Icon for the Grantee Level Form

rants Manage	ment System			As a Grantee 🗸 🙆 🗸	LSC America's Partner for Equal Justice
Opportunities	Applications Grants Monitoring	Closeout			
Grantee Activity Rep EGMS ID PR-GAR-2214		Status Created	Other GAR Forms		Cancel Save
Page instruction	Created	_	St atted to Grantor	Approved	Required to Submit
Overview	GAR - Staff Case Services	GAR - PAI Case Services	Cther GAR Forms	Collab	
A Introductio	n				
cases, and the g service area—B Calendar Year (0 <u>Manual</u> provides	rantee's certification that the staffing and sic Field, Agricultural Worker, Native Am (Y) Grantee Activity Reports are due to L	office information in the grantee prof erican—for which an LSC grantee re SC by the first business day of Marcl GAR data submission requirements	file is accurate. Service area-level forr aceives a grant. In addition, Private At h. A downloadable manual with guida	a. Grantee-level forms solicit information on other services provided, additional int ns solicit Information on Expenses, Revenue, Case Services, Open Cases, and Do orney Involvement (PAI) data are required for Basic Field service areas. toe for navigating and submitting GAR data in GrantEase is <u>here</u> . The downloadat al resources for the GAR reporting cycle can be accessed on the <u>Grantee Activity</u> .	mographics each

Once in the correct GAR Report, users should select the Other GAR Forms Tab.

Figure 3: Image of Navigating to the Other GAR Forms Tab

Once on the **Other GAR Forms tab**, users should scroll down to the **Grantee Level Forms** section, where they will see the **Grantee Level Forms**.

	ce on the Grantee Level Forms (Offices & Sta	affing Other Services Additional Case Information	alessa and the CAR Cuidenee						
he forms below are reported at the grantee level, covering all service areas. For detailed guidance on the Grantee Level Forms (Offices & Staffing, Other Services, Additional Case Information), please see the GAR Guidance bocument. For detailed guidance on the Self-Inspection Certification and Summary Form or the Ongoing Compliance Oversight Form, please see the Self-Inspection & Ongoing Compliance Reports Submission Guidance Document. Rease click on the green eye icon in a row to open each set of forms.									
~									
/alidated? Last Mod	lified By ID	Last Modified Date	Actions						
Amy Anth	ony	01/07/2022 12:19 PM	۲						
manu adr	nin	11/15/2021 10:00 AM	۲						
manu adr	nin	11/15/2021 10:00 AM	۲						
	Q falidated? Last Mod Amy Anth manu adm	Click     Last Modified By ID       Amy Anthony     manu admin	Califacted?         Last Modified By ID         Last Modified Date           Array Anthony         01/07/2022 12:19 PM           manu admin         11/15/2021 10:00 AM						

Figure 4: Image of Locating the Grantee Level Forms in the Other GAR Forms Tab

<ul> <li>Grantee Level Forms</li> </ul>				=				
			Forms (Offices & Staffing, Other Services, Additional Case sight Form, please see the Self-Inspection & Ongoing Co					
Please click on the green eye icon in a row to open each set of forms. Search View Grantee								
Showing 1 to 3 of 3 records			Level Forms					
Form Name	Form Validated?	Last Modified By ID	Lever Forms	Actions				
		A second and a second	01/07/2022 12:19 PM	20				
Grantee Level Forms	×	Amy Anthony	01/07/2022 12:19 PM					
Grantee Level Forms Self-Inspection Certification and Summary Form	×	amy anthony manu admin	11/15/2021 10:00 AM	•				

Figure 5: Image of Selecting the View Icon for Grantee Level Forms in the Other GAR Forms Tab

# **Certifying Office and Staff**

Before users begin filling out any GAR forms, they should ensure that the offices and staffing section of the Grantee Profile are updated and corrected as necessary.

If users have not updated this information, <u>they should go back and update ALL staff</u> <u>contacts</u> and <u>ALL office locations</u>, including subgrantee office locations. If guidance is needed to update this information, please refer to the **Updating the Grantee Profile Micro-Module** or **Manual Section**.

To begin filling out the Grantee Level Forms, users should select the Edit Mode button.

GRANTEASE	Grants Management System	As a Grantee  As a Grantee  LEGAL SERVICE COPORATION
<	Opportunities Applications Grants Monitoring Closeout	
Q Search - Search Q	GAR Grantee Level Forms	Validate Form Edit Back Grantee Level Form
All v		
Tasks - My Tasks -	Offices & Staffing Other Services Additional Case Information	Edit Mode Button
Pending Tasks Completed Tasks Reassign Tasks	Please click the "Grantee Profile" button on the left side of your screen (under "Activities" > "Organization") and ensure that the "Offices" and "c date. Once you have confirmed that the information in those forms is correct and up to date, please click the blue "Edit" button in the bottom rig	Organizational Staff Contacts" forms have been updated and are current as of the reporting
<ul> <li>Activities -</li> <li>Organization -</li> </ul>	I certify that the office and staffing information in my organization's program profile was reviewed and is current as of Dec 31 of the prior year.	
Grantee Profile GAR Report	Form Number Form Version	Validate Form Edit Back

Figure 6: Image of Selecting the Edit Mode Button on the Grantee Level Form

Once users have verified that all office and staffing information is updated, they should return to the Grantee Level Form and click on the **Certification Checkbox**, acknowledging that all staff contacts and office location information are updated.

GRANTEASE	Grants Management System	As a Grantee 🗸 🔼 🗸	LEGAL SERVICES CORPORATION
<	者 Opportunities Applications Grants Monitoring Closeout 🔮 🗩		
Q Search –	GAR		Cancel Save
Search Q	Grantee Level Form	Grantee Level Form	v
All 🗸			
📑 Tasks –		* Required for Save	A Required for Submit
My Tasks –	Offices & Staffing Other Services Additional Case Information		
Pending Tasks			
Completed Tasks	Please navigate to your Grantee profile to ensure that the offices and staffing information presented is up to date. If this information is correct, p	lease click the form edit button	and then click the
Reassign Tasks	box below to confirm that your Office and Staffing information is correct.		
🍽 Activities 🛛 –			
Organization – Grantee Profile	I certify that the office and staffing information in my organization's program profile was reviewed and is current as of Dec 31 of the prior year.		
Recently Viewed -			

Figure 7: Image of the Staffing and Office Review Certification Checkbox

#### Next, users should click the SAVE button.

GRANTEASE	Grants Management System	As a Grantee  As
<	G Opportunities Applications Grants Monitoring Closeout	
Q Search - Search Q	GAR Grantee Level Forms	Cancel Save Grantee Level Forms
All - Tasks - My Tasks -	Offices & Staffing Other Services Additional Case Information	Save Button
Pending Tasks Completed Tasks Reassign Tasks Activities – Organization – Grantee Profile GAR Recort	Please click the "Grantee Profile" button on the left side of your screen (under "Activities" > "Organization") and ensure that the "Offices" and "Organizational Stat date. Once you have confirmed that the information in those forms is correct and up to date, please click the blue "Edit" button in the bottom right corner of this sc location of the office and statting information in my organization's program profile was reviewed and is current as of Dec 31 of the prior year.	

Figure 8: Image of Selecting the Save Button on the Certified Offices & Staffing Tab of the Grantee Level Form

#### **Other Services Tab**

Users can begin the **Other Services section** of the **Grantee Level Form** by navigating to the **Other Services tab.** 

GRANTEASE	Grants Management System	As a Grantee  As
<	n Opportunities Applications Grants Monitoring Closeout	
Q Search - Search, Q	GAR Grantee Level Forms	Validate Form Edit Back E Grantee Level Forms v
All V Tasks – My Tasks –	Offices & Staffing Other Services  Additional Case Information	
Pending Tasks Completed Tasks Reassign Tasks Activities –	Please click the "Grantee Profile n on the left side of your screen (under "Activities" > "Organization") and ensure that the "Offices" and "Organizational Staff Contact date. Once you have confirmed information in those forms is correct and up to date, please click the blue "Edif" button in the bottom right correr of this screen, clic leently that the office and staffing momention in my organizations program profile was reviewed and is current as of Dec 31 of the prior year.	
Organization – Grantee Profile GAR Report O Recently Viewed –	Form Number Form Version	Validate Form Edit Back

Figure 9: Image of Other Services Tab

The **Other Services** tab has several sections, including an "Introduction," "Website Analytics for Program Website," "Legal Education or Legal Information Provided to Clients - Group Events," "Legal Education or Legal Information Provided to Clients- One-on-One Services/Assistance," "Outreach Events for Professional and Partner Organizations," "Referrals," "Other Services Narrative and Summary Report," "Overview of Other Services Provided," "Vignettes," and "Additional Comments."

GRANTEASE	Grants Management System	As a Grantee - LSC America's P
<	Poportunities Applications Grants Monitoring Closeout	
Search –	Grantee Level Forms	Validate Form Edit Back Grantee Level Forms
Tasks –	Offices & Staffing Other Services  Additional Case Information	
y Tasks —	▲ Introduction	
Pending Tasks Completed Tasks Reassign Tasks	The Other Services form collects quantitative and narrative data about grantees' client services other than case work, including legal education for scope of services other than casework that benefit the low-income population and consume a significant amount of grantees' resources. For detaile Document.	
Activities – rganization – Grantee Profile	To update the forms below, please click the blue "Edit" button available in the top right and bottom right corners of this screen. When you are done, save your changes before navigating away from this screen. When all information has been entered, saved, and verified for accuracy, please click GrantEase will inview the information entered and identify any issues requiring almetrics. This form must be validated before the 202 Cannete Acit	the blue "Validate Form" button in the top right or bottom right corner of this screen;
GAR Report	← Website Analytics for Program Website	
Recently Viewed – Volunteer Lawyers Project		
Volunteer Lawyers Project PR-GAR-2214	✓ Legal Education or Legal Information – One-on-One Services / Assistance	
Volunteer Lawyers Project	✓ Legal Education or Legal Information and Outreach: Number of Events	
Volunteer Lawyers Project PR-GAR-2214	▼ Referrals	
2022 PBIF Transformation 2022 PBIF Project	✓ Other Services Narrative and Summary Report	
PR-GAR-2326	Overview of Other Services Provided	
PR-GAR-2302 PR-GAR-2302 Technical Support –	✓ Vignettes	New

Figure 10: Image of the Other Services Tab Sections

- A few quick tips for the *GrantEase* system:
- If users see an orange dot, a form is missing information.
- If users cannot enter information, they should click on the Edit button to go into EDIT mode.

Grants Management System	As a Grantee  As
A Opportunities Applications Grants Monitoring Closeout	
GAR Grantee Level Forms	Validate Form Edit Back Grantee Level Form
Offices & Staffine Other Services Additional Case Information	
Introduction The Other Services form collects quantitative and narrative data about grantees: client services other than case work, including legal education for commus scope of services other than casework that benefit the low-income population and consume a significant amount of grantees resources. For detailed guid	Edit Mode d referrals. This data highlights the in in the 2021 GAR Guidance
Document. To update the forms below, please click the blue "Edit" button available in the top right and bottom right corners of this screen. When you are done, please save your changes before navigating away from this screen. When all information has been entered, saved, and verified for accuracy, please click the blue GrantEase will review the information entered and identify any issues requiring attention. This form must be validated before the 202 Grantee Activity Res	
Website Analytics for Program Website     Level Education of Level Information - Group Events	

Figure 11: Image of the Missing Information Dot and the Edit Mode Button

Users should begin by reading the **Introduction** section. Here, users will find a summary of the **Other Services Form**.

Grants Management System	📕 As a Grantee 👻 🔼 🗸	LEGAL SERVICES CORPORATION		
N Opportunities Applications Grants Monitoring Closeout				
GAR Grantee Level Forms	Validate For Grantee Level Forms	rm Edit Back 🚍		
Offices & Staffing Other Services Additional Case Information				
The Other Services form collects quantitative and narrative data about grantees' client services other than case work, including legal education for communities and individuals, outreach events, and referrals. This data highlights the scope of services other than casework that benefit the low-income population and consume a significant amount of grantees' resources. For detailed guidance, please see the Other Services section in the 2021 GAR Guidance Document.				
To update the forms below, please click the blue "Edit button available in the top right and bottom right corner to save your changes before navigating away from this serven. When all information has been entered, saved, and writing for accuracy, please click the blue "Auliate Form", button in the top right or bottom right corner to save your changes before navigating away from this serven. When all information has been entered, saved, and writing for accuracy, please click the blue "Auliate Form", button in the top right corner of this screen; GrantEase will review the information entered and identify any issues requiring attention. This form must be validated before the 2021 Grantee Activity Report can be submitted.				
▼ Website Analytics for Program Website				
Legal Education or Legal Information - Group Events				

Figure 12: Image of the Introduction Section of the Other Services Tab

After reading this section, users should move to the **Website Analytics** section to input their Program Website information.

Users must **<u>save every section</u>** as they move through it, and if unable to enter data, make sure to put the screen in EDIT mode.

In the first section, users must enter in numbers for each field:

- Number of users,
- Number of sessions,
- Average length of sessions (in seconds),
- Number of page views,
- Number of page views per session, and
- Bounce rate

When complete, users should click on the **SAVE button**.

Grants Management System		As a Grantee - LSC America's Parts
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GAR Grantee Level Forms		SAVE Button
<b>D</b>		Required for Save     A Required for Subm
Offices & Staffing Other Services Additional Case Inform	nation	
▲ Introduction		
	bout grantees' client services other than case work, including legal education for c he low-income population and consume a significant amount of grantees' resource	
▲ Website Analytics for Program Website		
Number of users (unique visitors):*	7	
Number of sessions."	7	
Average length of sessions (in seconds);*	7.00	
Number of page views:*	7	
Number of page views per session:*	7.00	
Bounce rate:*	7.00	

Figure 13: Image of the Completed Website Analytics Section in Edit Mode and Selecting the Save Button

When this section is complete, users should complete the information needed in the "Legal Education or Legal Information Provided to Clients - Group Events," "Legal Education or Legal Information Provided to Clients- One-on-One Services/Assistance," "Outreach Events for Professional and Partner Organizations," and "Referrals" sections.

Remember to click on the SAVE button after completing each section.

## 2021 GAR Reporting Guidance

Detailed information regarding each of these sections, revised definitions, and instructions on how to retrieve data like analytics from grantee websites, etc., can be found in the 2021 GAR Guidance document.

#### **Overview of Other Services and Vignettes**

The **Other Services Narrative and Summary Report** section displays an overview for the remaining sections in the **Other Services** tab. The **Other Services Narrative and Summary Report** provides grantees an opportunity to profile activities other than case services they

consider noteworthy. This information is critically important because many do not understand the need, value, and significance of these activities.



Figure 14: Image of the Other Services Narrative and Summary Report Explanation

Users should select the Edit Mode Button to begin entering the narrative portion of the next section.

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🚰 Opportunities Applications Grants Monitoring Closeout 🕓 🗩						
GAR Grantee Level Forms	Validate Form Edit Back E Grantes Level Forms					
Offices & Staffing Other Services Additional Case Information						
- Introduction	▼ Introduction					
✓ Website Analytics for Program Website	website Analytics for Program Website					
	EDIT MODE					
	EDIT MODE					
▼ Referrals	Button					
▲ Other Services Narrative and Summary Report						
The Other Services Narrative Summary Report provides grantees an opportunity to profile activities other than case services that they consider noteworthy. This information is critically important because many do not understand the need, value and significance of these activities.						
Please provide information that demonstrates how your organization's services other than casework significantly benefitted clients, whether the	ney are individuals, families or the broader community.					
▲ Overview of Other Services Provided						
Please provide a narrative overview (300-1000 words) of the "other services" your organization provided in each of the areas identified below.						
Examples of topics you might wish to address include goals, service delivery strategies, special populations affected, and notable results and benefits for the client community.						
1. Legal Education / Legal Information provided to clients, either on a one-on-one basis or in a group setting:						
<ol> <li>Outreach events focused primarily on professionals, partner organizations, social service agencies, bar groups, etc.:</li> <li>bbbb</li> </ol>						

Figure 15: Image of the Other Services Narrative and Summary Report Explanation

Users should start in the **Overview of Other Services Provided** section by providing a narrative overview (300-1000 words) of the other services provided by their program during this year, briefly addressing each of the types of other services listed in the box.

Some examples of topics include *service delivery strategies*, *special populations affected*, and *any notable results*.

Users should complete each of the <u>four fields</u> in this section. Once finished with this section, be sure to click the **SAVE button**.

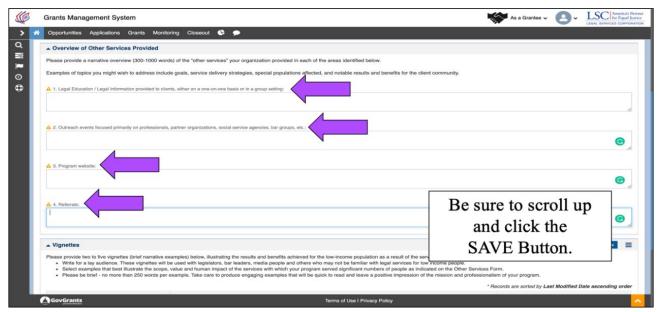


Figure 16: Image of the Four Narrative Boxes of the Other Services Narrative Summary and Report

Users should then move on to the **Vignettes** section. Here, users will provide 2-5 vignettes, which are brief narratives illustrating the results and benefits achieved for the low-income population(s) in your service area(s) as a result of the other services discussed above.

Remember that this should be written for a lay audience, and the examples should best illustrate scope, value, and human impact. Each vignette should **<u>be brief</u>** and no more than 250 words.

To add a vignette, click on the **NEW button**, which will produce a pop-up box, enter a title and a description, then click on **SAVE**.

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A 3. Program website:				
🔺 4. Referrals:				G
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<ul> <li>Write for a lay audience.</li> </ul>	tes (brief narrative examples) below, illustrating the results and benefits achieved for the low-income population as a result of the services described abo These vigneties will be used with legislators, bar leaders, media people and others who may not be familiar with legal services for low income people.		>	New
Please provide two to five vigne • Write for a lay audience. • Select examples that ber • Please be brief - no more	These vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators is or knowne people. Illustrate the scope, value and human impact of the services with with your program served significant numbers of people as indicated on the Other Sc than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof	ervices Form. essionalism of your program * Records are sorted by a	st Modified L	
Please provide two to five vigne • Write for a lay audience. • Select examples that be	hese vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators can be uncome people. Illustrate the scope, value and human impact of the services with with your program served significant numbers of people as indicated on the Other St than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof Vignette Description	ervices Form. lessionalism of your program	st Modified D	
Please provide two to five vigne • Write for a lay audience. • Select examples that ber • Please be brief - no more	These vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators is or knowne people. Illustrate the scope, value and human impact of the services with with your program served significant numbers of people as indicated on the Other Sc than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof	ervices Form. essionalism of your program * Records are sorted by a	st Modified D	
Please provide two to five vigne • Write for a lay audience. • Select examples that ber • Please be brief - no more	hese vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators else for low income people. Illustrate the scope, value and human impact of the services with with your program service displicant numbers of people as indicated on the Other Sc than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof Vignette Description No Records Found	ervices Form. essionalism of your program * Records are sorted by a	st Modified D	
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Please provide two to five vigne • Write for a lay audience. • Select examples that be: • Please be brief - no mon Title	hese vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators concome people. Illustrate the scope, value and human impact of the services with with hy your program service vignificant numbers of people as indicated on the Other St than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof Vignette Description No Records Found	ervices Form. essionalism of your program * Records are sorted by a	St Modified L	
Please provide two to five vigne • Write for a lay audience. • Belied examples that ber • Please be brief - no mon Title Please provide any additional com	hese vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators concome poople. Silvartate the scope, value and humani impact of the services with which your program service vignificant numbers of people as indicated on the Other So than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof Vignette Description No Records Found provency ments (no more than 250 words) that would help readers to better understand the information submitted above.	ervices Form. essionalism of your program * Records are sorted by a	st Modified D	Pate ascending orde
Please provide two to five vigne • Write for a lay audience. • Select examples that be: • Please be brief - no mon Title	hese vignettes will be used with legislators, bar leaders, media people and others who may not be familiar with legislators concome poople. Silvartate the scope, value and humani impact of the services with which your program service vignificant numbers of people as indicated on the Other So than 250 words per example. Take care to produce engaging examples that will be quick to read and leave a positive impression of the mission and prof Vignette Description No Records Found provency ments (no more than 250 words) that would help readers to better understand the information submitted above.	ervices Form. essionalism of your program * Records are sorted by a	st Modified C	

Figure 17: Image of the Vignettes Section of the Other Services Tab and the New Vignette Button

dd Vignette	×
	Save
	✤ Required for Save ▲ Required for Submit
Vignette	
*Title	
*Vignette Description	
	4
	Save

Figure 18: Image of the Add Vignette Pop-up Screen and Selecting the Save Button

If at any time a user would like to view their vignette, they should click on the **green eyeball icon**. To edit a vignette, users should click on the **blue pencil icon**. Finally, if a user is not satisfied, they should click on the **red garbage can icon** to delete the entry. Once users have added all of their Vignettes, they should click on the **SAVE** button.

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אר אין	8	Opportunities Applications Grants Mo	nitoring Closeout 🖶 🗩	S.
1		4. Referrals:		0
Φ		▲ Vignettes	View	v Icon
		<ul> <li>Write for a lay audience. These vignettes w</li> <li>Select examples that best illustrate the sco</li> </ul>	e examples) below, illustrating the results and benefits achieved for the low-income population as a result ill be used with legislators, than leaders, media people and others who may not be familiar with legal service ps, value and human impact of the services with which your program service displicant numbers of people ser example. Take care to produce engaging examples that will be quick to read and leave a positive impre	of the service, rescribed above. es for tow inco, people. as indicated on Other Services Form.
		Title	Vignette Description	Actions
		aaa bbbb	details	
		eccec	even more details Delete Icc	$n \longrightarrow 6$
		Additional Comments (optional) Please provide any additional comments (no more the	n 250 words) that would help readers to better understand the information submitted above.	ĥ
		orm Number 12345 Form Version		Baci Save

Figure 19: Image of the View, Edit, and Delete Icons in the Vignettes Section and the Additional Comments Section

The **Additional Comments** section at the bottom is for any additional information needed. The purpose of the narrative, vignettes, and additional comments is to demonstrate the value and impact of this work.

Once users finish entering information for all sections in the **Other Services** tab, they should click on **Validate Form button**. If any information is missing from the forms, users will see

a validation error message. This error will need to be corrected before the form can be verified in the *GrantEase* system.

(f)		Grants Management System			As a Grantee - Core LSC America's	
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		Offices & Staffing Other Services Additional Case Information	[	Validate Form		
		▲ Introduction				- 1
		The Other Services form collects quantitative and narrative data about grain highlights the scope of services other than casework that benefit the low-in		Button	reach events, and referrals. This data	
		Website Analytics for Program Website	L			
		Number of users (unique visitors):*	7			
		Number of sessions:*	7			
		Average length of sessions (in seconds):*	7.00			
		Number of page views:*	7			
		Number of page views per session:*	7.00			
		Bounce rate:*	7.00			
		Legal Education or Legal Information: Number of Persons Served				
		Legal Information or Legal Education provided in group presentations to clients potential clients and/or community groups:*	7			
		Legal Information or Legal Education provided to an individual on a one-on-one basis at venues other than court help desks:*	7			
		Legal Information or Legal Education provided to an individual on a one-on-one basis at	7			
		GovGrants	Terms of Use I	Privacy Policy		^

Figure 20: Image of the Validate Form Button for the Other Services Section

## **Additional Case Information**

Users should then click on the **Additional Case Information** tab. Users must click on the **Edit Button** to complete the form.

GRANTEASE	Grants Management System	As a Grantee • O • LSC America's Purtuer LEAL SERVICES COMPONITOR
<	🛪 Opportunities Applications Grants Monitoring Closeout 🕓 🗩	
Q Search –	GAR	Validate Form Edit Back
Search Q	Grantee Level Forms	Grantee Level Forms
All		
📑 Tasks –	Offices & Staffing Other Services Additional Case Information	
My Tasks —	▲ Introduction	
Pending Tasks Completed Tasks	The Other Services form collects quantitative and narrative data about grantees' client services other than case w	ork, including legal education for communities and individuals, outreach events.
Reassign Tasks	and referrals. This data highlights the scope of services other than casework that benefit the low-income population	
Activities –	Website Analytics for Program Website	
Organization –		
Grantee Profile	Number of users (unique visitors):*	
Recently Viewed -	Number of sessions:*	
PR0617	Average length of sessions (in seconds):*	
Bay Area Legal Aid	Number of page views:*	
Bay Area Legal Aid	Number of page views per session:*	
PICK_ME BFG DIRECTED	Bounce rate:*	
PICK_ME BFG DIRECTED	▲ Legal Education or Legal Information: Number of Persons Served	
PR0005	Legal Education or Legal Information: Number of Persons Served	
ME_TOO COMPETITIVE	Legal Information or Legal Education provided in group presentations to clients potential clients and/or community groups:*	
DEMO RSLC	cients potential cients and/or community groups: Legal Information or Legal Education provided to an individual on a one-on-	
DEMO RSLC	one basis at venues other than court help desks:"	
	Legal Information or Legal Education provided to an individual on a one-on-	
Technical Support –	one basis at court help desks:*	
Contact Us	GovGrants Terms of Use I Privacy I	Policy

Figure 21: Image of Navigating to the Additional Case Information Tab

In this section, users will enter in the <u>Total Number of Persons</u> in all households served, the <u>LSC-reportable Cases Involving Domestic Violence</u>, followed by the <u>Cases Closed Not</u> <u>Reported to LSC</u>. Once finished, users should click on the **Save button**.

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>	*	Opportunities Applications Grants Monitoring Closeout 🕓	۶				
α		Offices & Staffing Other Services Additional Case Inform	ation				
		Additional Case Information table					
⊘ ⊕		1. Total number of Persons in all Households Served:					
<b>U</b>		1.1. Total number of Adults.*	9				
		1.2. Total number of Children:*	9				
		1.3. Total number of all persons served:	18				
		2. LSC-reportable Cases Involving Domestic Violence:		٦			
		2.1. Total number of Cases involving Domestic Violence:*	1				
		<ol> <li>Cases Closed Not Reported to LSC (Number of non-LSC funded Cases not reported to LSC).<sup>*</sup></li> </ol>	1				
	F	Form Number 12345 Form Version					Back Save

Figure 22: Image of the Table on the Additional Case Information Tab in Edit Mode

## 2021 GAR Reporting Guidance

General Reporting Guidance regarding definitions and additional field details can be found in the 2021 GAR Guidance Document.

Users will then see a field that says the form has been saved successfully.

s t	Grants Management System		As a Grantee • LSC America Partner LEGAL 6ERVICES COMPORATION
>	😚 Opportunities Applications Grants Monitoring Closeout 條 🗩		
α III	Form saved successfully.		×
∎ © ⊕	GAR Grantee Level Form		Validate Form         Edit         Back         Edit           Grantee Level Form
	Offices & Staffing Other Services Additional Case Information	Successfully	
	Additional Case Information table	Saved Form	
	1. Total number of Persons in all Households Served:	Saved Form	
	1.1. Total number of Adults:* 9		
	1.2. Total number of Children:* 9		
	1.3. Total number of all persons served: 18		

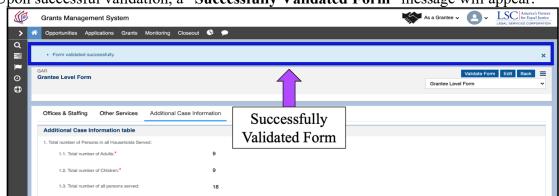
Figure 23: Image of the Successfully Saved Form Message

Next, users should validate the form to find any errors, discrepancies, or missing fields.

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11	Form saved successfully.		×
	GAR Grantee Level Form		Validato Form Edit Back Grantee Level Form
÷			
	Offices & Staffing Other Services Additional Cas	e Information	
	Additional Case Information table		Validate Form
	1. Total number of Persons in all Households Served:		
	1.1. Total number of Adults:*	9	Button
	1.0 Total and the different	0	

Figure 24: Image of the Validate Form Button for Additional Case Information

Note that although validation errors may not appear during the initial validation, upon submission of the completed GAR, users may see validation errors that refer back to the specific section completed or omitted in error.



Upon successful validation, a "Successfully Validated Form" message will appear.

Figure 25: Image of the Successfully Validated Form Message for the Additional Case Information Form

# 4. OCE Self-Inspection and Ongoing Compliance Oversight Forms

## Navigating to the Self-Inspection Certification and Summary Form

As a reminder, the self-inspection provides data LSC requires to determine a statistical measure of the accuracy of LSC grantee Case Services Reports (CSR).

To begin the **Self-Inspection Certification and Summary Form**, users should click on the **Other GAR Forms** tab. On the **Other GAR Forms** tab, users will see two sections labeled, **Grantee Level Forms** and **Service Area Forms**. Under the Grantee Level Forms section, users will see a list of forms.

This section of the manual outlines the completion of the Self-Inspection Certification and Summary Form and the Ongoing Compliance Oversight Form.

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Opportunities Applications G	rants Monitoring	Closeout				
intee Activity Reports						Cancel Save
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Page instruction text						
Created		_	Submitted to G	rantor	Approved	
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Overview OGAR - Staff	Case Services	GAR - PAI Case	Services Other GAR Form	s 🚳 Collab		
Grantee Level Forms						=
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Search	a row to open each	set of forms.			complainte reporte coorneeton co	
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Search Showing 1 to 3 of 3 records	Q		Last Modified By ID Anny Anthony	Last Modified Date 01/10/2022 6:10 PM		
Search Showing 1 to 3 of 3 records Form Name	Q Form Validated		and the second		Actions	
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Search Showing 1 to 3 of 3 records Form Name Grantee Level Forms Self-Inspection Certification and Summary Form Orgoing Compliance Oversight	C Form Validated X X		Amy Anthony Amy Anthony	01/10/2022 6:10 PM 01/11/2022 2:34 PM 11/15/2021 10:00 AM	Actions (*)	
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Search Showing 1 to 3 of 3 records Form Name Grantee Level Forms Self-Inspection Certification and Summary Form Ongoing Compliance Oversight Form  Service Area Form(s) Bervice Area Invel forms request ser	Com Validated * * *	? These include Expenses	Arry Anthony Arry Anthony manu admin Total Records:	01/10/2022 6:10 PM 01/11/2022 2:34 PM 11/15/2021 10:00 AM	Actions	▼ ided with each form

Figure 1: Image of the Other GAR Forms tab on the Grantee Activity Reports page

Users must select the **green eyeball** icon next to the **Self-Inspection Certification and Summary Form** to view it.

				<ul> <li>Required to Save A Required to Save</li> </ul>
Overview OGAR - Staf	ff Case Services	Al Case Services Dether C	AR Forms Collab	
Grantee Level Forms				
			tee Level Forms (Offices & Staffing, Other Services, Additional Case Informa Self-Inspection & Ongoing Compliance Reports Submission Guidance Doc	
		liance Oversignt Form, please see the	Self-Inspection & Orgoing Compitance Reports Submission Guidance Doc	ument.
lease click on the green eye icon in	n a row to open each set of forms.			
Search	Q			
Search Showing 1 to 3 of 3 records	Q			
Showing 1 to 3 of 3 records	Q Form Validated?	Last Modifie	I By ID Last Modified Date	Actions
Showing 1 to 3 of 3 records		Last Modifie Amy Anthony	I By ID Last Modified Date 01/10/2022 6:10 PM	Actions
	Form Validated?			
Showing 1 to 3 of 3 records Form Name Grantee Level Forms Self-Inspection Certification and	Form Validated?	Amy Anthony	01/10/2022 6:10 PM	

Figure 2: Image of the View Icon for the Ongoing Compliance Oversight Form on the Other GAR Forms tab

Grantees are required to sample approximately 5% of their cases (*subject to a minimum of 75* cases and a maximum of 300 cases.) Grantees with multiple offices are required to sample at least 15 cases from each of their offices. The sample size of larger grantees with multiple offices should not exceed 300. For additional guidance on the self-inspection process or form or the Ongoing Compliance Oversight Form, please consult the <u>Guidance for Conducting</u> 2021 Self-Inspections of Closed Cases and Reporting Ongoing Compliance Oversight to LSC, which is also linked on LSC.gov Grantee webpage.

**Completing the Self-Inspection Certification and Summary Form** Once in the **Self-Inspection Certification and Summary Form**, users will see three sections: Certification, Self-Inspection, and Self-Inspection Summary.

We ask that users complete the Certification section and check box after adding all relevant information in the other sections.

To begin filling out the Self-Inspection Certification and Summary Form, users should select the **Edit Mode** button.

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>	*	Goportunities Applications Grants Monitoring Closeout	
ơ III I		GAR Self-Inspection Certification and Summary Form Self-Inspection Certification and Self-Inspection Certification and Self-Inspection And Self-Inspec	
0			
٥		* Certification	
		For this and previous years' self-inspection and ongoing compliance oversight guidance and supporting documents, please visit https://www.lsc.gov/grants-grante-resc	
		Grantee certifies that it has completed the Self-Inspection Process as required and specified in this year's Guidance for Conducting Self-Inspections of Closed Cases and Reporting C Edit Mode Button	
		▲ Self-Inspection	
		1. Number of cases reviewed in the representative sample of the total number of cases being reported to LSC. (You must enter a number 80 between 75 and 300 in this field); •	
		2. Number of cases sampled in which one or more errors were noted. Please include all cases in which an error was noted even if the error 70	

Figure 3: Image of Selecting the Edit Mode Button on the Self-Inspection Certification and Summary Form

If users need specific guidance regarding filling out the sections of the **Self-Inspection Certification and Summary Form**, they should refer to the Guidance for Conducting 2021 self-Inspections of Closed Cases and Reporting Ongoing Compliance Oversight <u>Guidance</u> for Conducting 2021 Self-Inspections of Closed Cases and Reporting Ongoing Compliance Oversight to LSC, which is provided via the LSC.gov webpage linked to in the Certification section of the form in **GrantEase**.

Grants Management System	As a C	Grantee 🗸	<b>8</b> ~	LSC America's Partner for Equal Justice
A Opportunities Applications Grants Monitoring Closeout				
GAR Self-Inspection Certification and Summary Form	Self	alf-Inspection	Certification a	Back Save
		• Rec	uired to Save	A Required to Submit
Certification     For this and previous years' self-inspection and ongoing compliance oversight guidance and supporting documents, please visit https://www.lsc.gov/grants-grantee-resour     Grantee certifies that it has completed the Self-Inspection Process as required and specified in this year's Guidance for Conducting Self-Inspections of Closed Cases and Reporting On		~		

Figure 4: Image of the Editable Self-Inspection Certification and Summary Form and Link to LSC Webpage with Guidance Documents

In the Self-Inspection section, users should answer question number one by entering the number of cases their organization reviewed in the sample (this number must be at least 75 and not more than 300).

▲ Self-Inspection	
1. Number of cases reviewed in the representative sample of the total number of cases being reported to LSC. (You must enter a number between 75 and 300 in this field.): •	
2. Number of cases sampled in which one or more errors were noted. Please include all cases in which an error was noted even if the error was fixed through corrective action taken at the time of or immediately after the Self-Inspection, include a case only once even if it had multiple errors. (Note: the number entered must be smaller than the number in item 1 and may be 0) •	
▲ Self-Inspection Summary	=
The information provided on this form summarizes the information from the Self-Inspection Case Review Forms completed for each case in your program's Self-Inspection sample. "Number of cases in the sample in which the specified type of error was identified. For example, in the first row, provide the number of cases in the sample in which "income information was no column: indicate if Corrective Action(s) was (were) implemented to address the cause(s) of the identified errors.	
Showing 1 to 13 of 13 records	
	Number

Figure 5: Image of Question 1 on the Self-Inspection Certification and Summary Form

Users will then navigate to the second question and indicate all cases in which an error was noted, even if the error was fixed through corrective action taken at the time of the error or immediately after.

▲ Self-Inspection	
1. Number of cases reviewed in the representative sample of the total number of cases being reported to LSC. (You must enter a number between 75 and 300 in this field.): •	
2. Number of cases sampled in which one or more errors were noted. Please include all cases in which an error was noted even if it had multiple corrective action taken at the time of or immediately after the Self-Inspection. Include a case only once even if it had multiple errors. (Note: the number entered must be smaller than the number in item 1 and may be 0) •	
▲ Self-Inspection Summary	Ξ

#### Figure 6: Image of Question 2 on the Self-Inspection Certification and Summary Form

After completing the Self-Inspection section, users can move onto the Self-Inspection Summary section. In this section, users will see a table with the explanation for each **Type of Error** listed.

	Grants	Management System	As a Grantee 🗸		America's Partner for Equal Justice
>	Oppor	tunitiae Analizatione Grante Manitovina Claesaut			
Q 📓		Inspection Summary rmation provided on this form summarizes the information from the Self-Inspection Case Review Forms completed for each case in your program's Self-Inspection sample. "Number of Cases with	Freed ashires asker the sur	nhar of orace in t	E
₽ 0	which th	imitation provided on this form summarizes the momentation from the semi-inspection case review "online completed for each case in your program's semi-inspection sample. Number of cases with especified type of error was identified. For example, in the first row, provide the number of cases in the sample in which "Income information was not recorded." "Corrective Action (Yes/No)" colum iss the cause(s) of the identified errors.			
0	Show	ing 1 to 13 of 13 records			
	#1	Type of Error	Number of Cases with Error	Corrective Action (Yes/No)	Actions
		A specific amount of income was not recorded, nor a specific entry or notation (not a computer default) that the applicant's household had no income.			•
		The recorded amount of household income was more than 200% of the poverty guidelines in effect at the time of case acceptance and the required documentation, that the applicant was eligible they were seeking to maintain benefits provided by a governmental program under 45 CFR §1611.5(a)(1) or were eligible based on medical expenses approved by the Director or designee unc §1611.5(a)(2), was not on file.			•
	3	The recorded amount of household income was greater than 125% but notmore than 200% of the poverty guidelines in effect at the time of case acceptance and the required documentation, the applicant should nevertheless be considered eligible based on the exceptions in 45 CFR §1611.5(a)(3) or the factors set out in 45 CFR §1611.5(a)(4), was not on file.	at the		•
		There was no specific entry or notation in the case file indicating that the applicant's household either: (a) had aspecific number of assets, or (b) had no assets (not a computer default), or (c) is benefits from a government program which tests for assets.	the recipient of		

#### Figure 7: Image of Self-Inspection Summary Table

#### To input information in each row, users should click on the **blue pencil icon**.

(p	Grants	Management System	As a Grantee 🗸	· <b>Q</b> ·	LSC America's Partner for Equal Justice
> 4	Opport	nities Applications Grants Monitoring Closeout			
٩	▲ Self-	nspection Summary			Ξ
		Error" column: enter th n: indicate if Corrective			
	# †	Type of Error	Num of Case with Erro	Con es Acti (Yes	
	1	A specific amount of income was not recorded, nor a specific entry or notation (not a computer default) that the applicant's household had no income.			
	2	The recorded amount of household income was more than 200% of the poverty guidelines in effect at the time of case acceptance and the required do they were seeking to maintain benefits provided by a governmental program under 45 CFR §1611.5(a)(1) or were eligible based on medical expenses approved by the Director or designee unde §1611.5(a)(2), was not on file.	ause ar 45 CFR		• 1
	3	The recorded amount of household income was greater than 125% but notmore than 200% of the poverty guidelines in effect at the time of case acceptance and the required documentation, that applicant should nevertheless be considered eligible based on the exceptions in 45 CFR §1611.5(a)(3) or the factors set out in 45 CFR §1611.5(a)(4), was not on file.	at the		۲

Figure 8: Image of the Edit Icon on the Self-Inspection Summary Section

For example, to complete the information needed for the first Type of Error, "A specific amount of income was <u>not</u> recorded, nor a specific entry or notation (not a computer default) that the applicant's household had no income," users will **first** provide the number of cases in the sample that were found to have this type of error, and **second**, will indicate "YES" or "NO" if corrective action(s) were implemented to address the cause(s) of the identified errors.

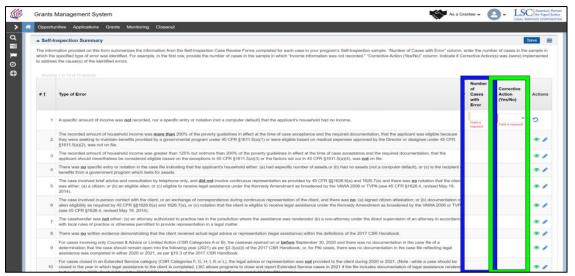


Figure 9: Image of Data Entry Columns on the Self-Inspection Summary Section

If users provide a number in the first column, they must answer the second column, which asks if corrective actions were taken.

If information is added in error, users can click on the **blue UNDO icon** to remove the data entered into each row and begin again.

	Grants	Management System 😽 As a	Grantee 🗸		America's Partner for Equal Justice
> 1	S Oppor	nities Applications Grants Monitoring Closeout			
a	▲ Self	nspection Summary			Save
₩ 2 0 0	which th to addre		imber of cases in t tion(s) was (were)		
¥			Number		
	# †	Type of Error	of Cases with Error	Corrective Action (Yes/No)	Actions
		A specific amount of income was not recorded, nor a specific entry or notation (not a computer default) that the app	required		
	:	The recorded amount of household income was more than 200% of the poverty guidelines in effect at the time of e linear was eligible because they were seeking to maintain benefits provided by a governmental program under 45 CFR §1611.5(a)(1) or were eligible based on medical expenses approved by the Director or designee under 45 CFR §1611.5(a)(2), was not on file.			•
	:	The recorded amount of household income was greater than 125% but notmore than 200% of the poverty guidelines in effect at the time of case acceptance and the required documentation, that the applicant should nevertheless be considered eligible based on the exceptions in 45 CFR §1611.5(a)(3) or the factors set out in 45 CFR §1611.5(a)(4), was not on file.			۰
	4	There was no specific entry or notation in the case file indicating that the applicant's household either: (a) had aspecific number of assets, or (b) had no assets (not a computer default), or (c) is the recipien benefits from a government program which tests for assets.	t i		•

Figure 10: Image of the Undo Icon on the Self-Inspection Summary Section

Users must enter a number for every column even if it is "0".

It is very important that users click on  $\underline{SAVE}$  at the top of the Self-Inspection Summary section table after each data entry.

Þ	Grants	Management System	As a G	rantee 🗸 🙆 🖌 📙	SC America's P for Equal Ja
> *	Opport	nities Applications Grants Monitoring Closeout 🕓 🗩			
	The infor the numb	nspection Summary and and this form summarizes the information from the Self-Inspection Case or cases in the sample in which the specified type of error was identified. For example, in the first row, provide the number of cases column: indicate if Corrective Action(s) was (were) implemented to address the cause(s) of the identified errors.	spection sample. *	"Number of Cases with Error" of mation was not recorded." "Con	
	# T	Type of Error	Number of Cases with Error	Corrective Action (Yes/No)	Actions
	1	Income information was not recorded	Field is required	Field is required	° o
	2	Household income exceeded 200% of the poverty guidelines			•
	3	Household income was over 125%, but not over 200%, of the poverty line and the required documentation was not on file			۲
	4	Assets information was not recorded			•
	5	Telephone cases in which citizenship/alien status was not noted (and client is not eligible under VAWA 2006 or TVPA -see 45 CFR	§ 162		۰ چ
	6	Non-telephone or extended-service cases that lacked a citizenship attestation or documentation of alien eligibility (and client is not e	eligibl		

Figure 11: Image of the Save Button on the Self-Inspection Summary Section

Users should see a message indicating that the Form has been saved successfully after clicking this button.

1	Grants Management System	As a Grantee - LSC America's Partner LISC America's Partner LISC America's Partner
>	😚 Opportunities Applications Grants Monitoring Closeout 🕓 🗩	
d 🖩 1	Form saved successfully.	×
∎ © ⊕	GAR Self-Inspection Certification and Summary Form	Validate Form Edit Back Edit Self-Inspection Certification and Summary Form V
	Certification	
	For this and previous years' self-inspection and ongoing compliance oversight guidance and supporting docum Grantee certifies that it has completed the 2020 Belf-Inspection Process as required by the Guidance for Conducting 20	nents, please visit https://www.lsc.gov/grants-grante-resources/grante-guidance/grante-activity-reports. 20 Self-Inspections of Closed Cases and Reporting Ongiong Compliance Oversight to LSC. Pursuant to those instructions:
	▲ Self-Inspection	
	<ol> <li>Number of cases reviewed in the representative sample of the total number of cases being reported to LSC. (You must enter a number between 75 and 300 in this field.):*</li> </ol>	80
	2. Number of cases sampled in which one or more errors were noted. Please include all cases in which an error was	70

Figure 12: Image of the Successfully Saved Message on the Self-Inspection Form

After each section has been completed and saved, users should go to the top of the screen and certify their form by selecting the checkbox.

0 0	GAR Self-Inspection Certification and Summary Form	Validate Form         Edit         Back           Self-inspection Certification and Summary Form
	Certification     For this and previous years' self-inspection and ongoing compliance oversight guidance and supporting documents, please visit https://www.isc.gov/grants-grantee-resourcess	s/grantee-guidance/grantee-activity-reports.
	ecertifies that it has completed the 2020 Self-Inspection Process as required by the Guidance for Conducting 2020 Self-Inspections of Closed Cases and Reporting Ongiong Complete Self-Inspection     Self-Inspection	iance Oversight to LSC. Pursuant to those instructions:
	1. Number of cases reviewed in the representative sample of the total number of cases being reported to LSC. (You nust enter a number between 75 and 300 in this field.): 2. Number of cases sampled in which one or more errors were retain. Places isclude at ense is which are answere the same field at the same is which are answere the same field. It is a case only once even if it had multiple errors. (Note: the term 1 and may be 0).	
	Self-Inspection Summary The information provided on this form summarizes the info Certification	Emple. "Number of Cases with Error" column: enter ne information was not recorded." "Corrective Action

Figure 13: Image of the Accuracy & Certification Checkbox on the Completed Self-Inspection Form

The final step will be to **VALIDATE** the form by clicking on the "Validate Form" button at the top of the page.

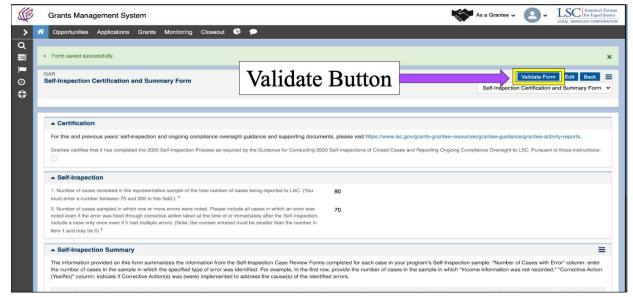


Figure 14: Image of the Validate Form Button on the Self-Inspection Certification and Summary Form

If there are any errors or missing fields, a validation error message will show and users will have to go back and rectify those errors.

Ø		Grants Management System Sa a Grantee - Control LESC Americal Justee
>	*	Opportunities Applications Grants Monitoring Closeout 🕓 🗩
o III 🗷		Please provide response to the question(s) - Certification ; Certify Box     Please provide response to the question(s) Self-Inspection Summary :2,3,4,5,6,7,8,9,10,11,12,13 ;number of cases with error should not be blank
0 (†		Self-Inspection Certification and Summary Form Edit Back Self-Inspection Certification and Summary Form
	1	Certification     Validation
		For this and previous years' self-inspection and ongoing compliance oversight Grantee certifies that it has completed the 2020 Self-Inspection Process as required Error Message and Reporting Onglong Compliance Oversight to LSC. Pursuant to those instructions:
	li	▲ Self-Inspection
		1. Number of cases reviewed in the representative sample of the total number of cases being reported to LSC. (You nust enter a number between 75 and 300 in this field.): •
		2. Number of cases sampled in which one or more errors were noted. Please include all cases in which an error was noted even if the error was fixed through corrective action taken at the time of or immediately after the Self-Inspection. Include a case only once even if it had multiple errors. (Note: the number entered must be smaller than the number in item 1 and may be 0) *
	li	▲ Self-Inspection Summary
		The information provided on this form summarizes the information from the Self-Inspection Case Review Forms completed for each case in your program's Self-Inspection sample. "Number of Cases with Error" column: enter the number of cases in the sample in which the specified type of error was identified. For example, in the first row, provide the number of cases in the sample in which "Income information was not recorded." "Corrective Action (Yes/No)" column: indicate if Corrective Action(s) was (were) implemented to address the cause(s) of the identified errors.

Figure 15: Image of Validation Error Messages from the Self-Inspection Certification and Summary Form

#### **Completing the Ongoing Compliance Oversight Form**

After users have completed and validated the Self-Inspection Certification and Summary Form, they should navigate to the **Ongoing Compliance Oversight Form** using the dropdown at the top right of the screen.



Figure 16: Image of Navigating to the Ongoing Compliance Oversight Form from the Dropdown Menu

The **Ongoing Compliance Oversight Form** is set up similarly to the Self-Inspection Certification and Summary Form.

If users need specific guidance regarding filling out the sections of the **Ongoing Compliance Oversight Form**, they should refer to the <u>Guidance for Conducting 2021 Self-Inspection of</u> <u>Closed Cases and Reporting Ongoing Compliance Oversight to LSC</u> which is also linked on the LSC.gov webpage in the Certification section of this page in **GrantEase**.

Grants Manage	ement System			As a Grantee 🗸 🧧	LSC America's Partner for Equal Justice LEGAL SERVICES CORPORATION				
Opportunities	Applications Grants Monitoring Closeout								
GAR Ongoing Comp	oliance Oversight Form			Valida Ongoing Compliance	ate Form Edit Back Oversight Form v				
	Compliance Oversight Form Summary avious years' self-inspection and ongoing compliance over	sight guidance and supporting docume	ents, please visit https://www.lsc.gov/grants-grantee	-resources/grantee-guidance/grantee-activ	ity-reports.				
Process, throug In the "Errors lo menu to identify box has been p Showing 1 to	orm information about the corrective actions implemented th the grantee's ongoing quality control, compliance revies lentified" column, select the appropriate "yes / no" option in the corrective action(s) taken, if any, to address the sour rovided in effort to capture all corrective actions undertake 13 of 13 records	vs, and case oversight. the dropdown menu to indicate wheth ce(s) of the error(s) identified in the coi on by grantees, not just those listed here isted here	her any cases were identified with the specified type rresponding row in the "Errors Identified" column. (S re.)	a of error. In the "Corrective Action(s) Taker Select as many options that apply. For "Othe	n" column, select from the er" responses, a narrative				
#1 Type of Error Errors Identified Corrective Actions Taken Additional Comments Actions									
A specific amount of income was <b>not</b> recorded, nor a           1         specific entry or notation (not a computer default) that         Image: the applicant's household had no income.         Image: the applicant's household had had had had had had had had had ha									
	The recorded amount of household income was ${\rm \underline{more\ than}}$ 200% of the poverty guidelines in effect at the time of case acceptance and the required								

Figure 17: Image of the LSC.gov Webpage That Links to Current Guidance Documents for the Ongoing Compliance Oversight Form

To begin, users should click on the **blue pencil icon** for each row which will open a pop-up screen.

Users must enter data into each column even i	if there were <b>NO</b> errors identified.

ants Manage	ement System			3.7	As a Grantee 🗸 🔼	LEGAL SERVICES CORPOR
Opportunities	Applications Grants Monitoring Closeout					
SAR Ongoing Comp	bliance Oversight Form				Validate F Ongoing Compliance Ove	Contraction of Contra
Ongoing C	Compliance Oversight Form Summary					=
Process, throug In the "Errors Id menu to identify box has been p	form information about the corrective actions implementes th the grantee's ongoing quality control, compliance revier bentified" column, select the appropriate "yes / no" option i y the corrective action(s) taken, if any, to address the sour rovided in effort to capture all corrective actions undertake 13 of 13 records	ws, and case oversight. n the dropdown menu to indic ce(s) of the error(s) identified	ate whether any cases were identified with the in the corresponding row in the "Errors Identifi	e specified type of error. In the "	Corrective Action(s) Taken" co	lumn, select from the
# 1	Type of Error	Errors Identified	Corrective Actions Taken	Additional	Comments	Actions
1	A specific amount of income was <b>not</b> recorded, nor a specific entry or notation (not a computer default) that the applicant's household had no income.		E	dit Icon		⇒ ⊘
2	The recorded amount of household income was more than 200% of the poverty guidelines in effect at the time of case acceptance and the required documentation, that the applicant was eligible because they were seeking to maintain benefits provided by a governmental program under 45 CFR §16115.(a)(1) or were eligible based on medical expenses approved by the Director or designee under 45 CFR §1611.5(a)(2), was not on file.					•1
	The recorded amount of household income was greater than 125% but notmore than 200% of the					

Figure 18: Image of the Edit Icon on the Ongoing Compliance Oversight Form

ype Of Error Summary	Save
	Required for Save     A Required for Submit
Overview	
Type of Error	
*Errors Identified	
No	
	<b>_</b>
	le la constance de la constance
	Save

If no errors were identified, users should select "NO" and then "SAVE."

Figure 19: Image of the Data Entry Pop-up Screen and Selecting "No"

If errors have been identified and users select "YES," an additional set of checkboxes will appear. Users must select <u>ALL</u> corrective actions that were taken.

Type Of Error Summary		×
		Save
	* Required for Save	A Required for Submit
Overview		
Type of Error		
None		
✓ Yes		-
No		
A Corrective Actions Laken		
		Save



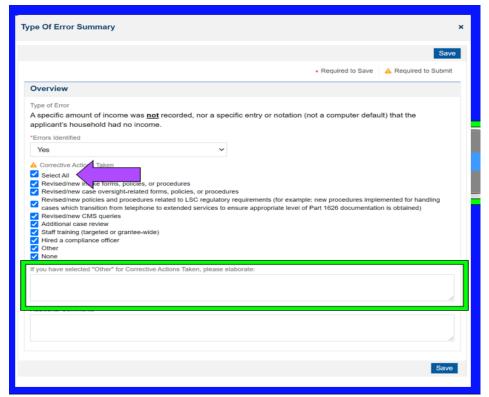


Figure 21: Image of Corrective Actions List That Appears on the Pop-up Screen after Selecting "Yes"

**NOTE:** Users may select the "Select All" option if ALL corrective actions listed were taken. If users select "OTHER," they must elaborate on what other corrective actions have been taken.

The Additional Comments box is optional.

Yes	~
A Corrective Actions Taken	
<ul> <li>Revised/new intake forms, policies, or p</li> </ul>	
Revised/new case oversight-related form	
	elated to LSC regulatory requirements (for example: new procedures implemented for
<ul> <li>handling cases which transition from tel- obtained)</li> </ul>	ephone to extended services to ensure appropriate level of Part 1626 documentation is
Revised/new CMS queries	
Additional case review	
Staff training (targeted or grantee-wide)	
Hired a compliance officer	
Other	
None None	
If you have selected "Other" for Corrective A	Actions Taken, niease elaborate
	ations failen, pouse elaborate.
Additional Comments	
	1.
	Save

Figure 22: Image of the Additional Comments Box on the Data Entry Pop-up Screen

Once all corrective actions are noted, users must click **SAVE**, move onto the next row, and follow the same steps for each "Type of Error" listed.

pe Of Error Summary				
			>	Save
		<ul> <li>Required</li> </ul>	for Save 🛕 Required	for Submit
Overview				
Type of Error				
Income information was not recorded				
*Errors Identified				
Yes	~			

Figure 23: Image of the Save Button on the Data Entry Pop-up Screen

Remember, users should select **SAVE** after entering data into each field, especially if they plan to leave and come back to the screen.

Once users have answered all questions and clicked SAVE, the next step is to VALIDATE the form for accuracy.

	5	Grants Mana	gement Sys	tem						As a	Grantee 🗸 🔼	LEGAL SERVICES CO	rica's Partner qual Justice DRPORATION
>	*	Opportunities	Applications	Grants	Monitoring	Closeout	٩	۶					
		Record saved su	uccessfully										×
		GAR Ongoing Compl	iance Oversig	ht Form						On	Validate		× = ~
		▲ Ongoing Co	ompliance Ove	ersight Fo	orm Summa	ry				· ·		_	
		For this and pr			ion and ongo	ing complia	nce ov	ersight	guidance and supporting documents, please visit https://www.lsc.gov/g	gra	Validate	Form	
		Report on this	form informatio	n about th					20 to address errors or compliance concerns identified during the year d case oversight.	r p	But	on	
		Taken" column	, select from the	e menu to	identify the o	corrective ac	tion(s)	taken,	dropdown menu to indicate whether any cases were identified with the if any, to address the source(s) of the error(s) identified in the correspo rovided in effort to capture all corrective actions undertaken by grantee	onding row	in the "Errors Ider		

Figure 24: Image of the Validate Form Button on the Completed Ongoing Compliance Oversight Form

If an error message appears, users should rectify the errors.

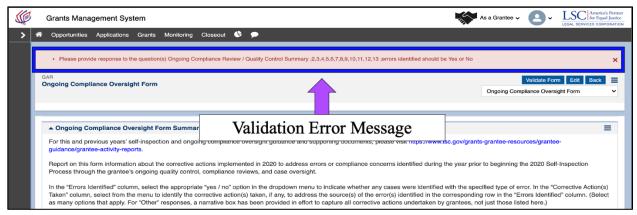


Figure 25: Image of the Validation Error Message on the Ongoing Compliance Oversight Form

# 5. Service Area Forms

#### **Accessing Service Area Form(s)**

To begin the Service Area Forms, users can either use the navigation dropdown and select Service Area Forms or click on the Other GAR Forms tab. On the Other GAR Forms tab, users will see two sections labeled, Grantee Level Forms and Service Area Forms. Users should navigate to Service Area Forms section.

GRANTEASE	Grants Management Sy	stem			A.	s a Grantee 🗸 🙆 🗸	LEGAL BERVICES CORPORA
<	Opportunities Applicati	ons Grants Monitor	ing Closeout				
Search –	Grantee Activity Reports						Cancel Save
ioarch Q	EGMS ID PR-GAR-2214		Status Created	Submitted On			
Tasks –	- Page instruction text						
y Tasks – Pending Tasks		Created		Submitted to Grantor		Approved	
Completed Tasks Reassign Tasks Activities –	Cverview OGA	R - Staff Case Service:	GAR - PAI Case Serv	ices 🗗 Other GAR Forms 🗣 Co	llab	<ul> <li>Required to Save</li> </ul>	A Required to Sub
ganization –		8					Ξ
3AR Report	Service Area Form(s	s)					≡
Recently Viewed – R-GAR-2214 olunieer Lawyers Project olunieer Lawyers Project R-GAR-2214			ta. These include Expenses, Reve ele in the "Information Reported at 1		s, and Categories of Private Attorney Involvemen Guidance Document. For technical guidance, pli		
/olunteer Lawyers Project	Showing 1 to 1 of 1 records	Туре	Form Validated?	Last Modified By ID	Last Modified Date	Actions	
olunteer Lawyers Project 022 PBIF Transformation	MA-11	General	×	manu admin	11/15/2021 10:00 AM	۲	
2022 PBIF Project				Total Records: 1			
R-GAR-2326 R-GAR-2302							
Technical Support -							Cancel Sav

Figure 1: Image of the GAR Forms Tab and the Associated Service Areas

Here, users will see all corresponding service areas denoted.

If there are many service areas, and users would simply like to view one, they should search for the service area name in the Search Box by clicking on the magnifying glass and selecting the corresponding service area.

GRANTEASE	Grants Managen	nent System			**		America's Partner for Equal Justice
<	Opportunities	Applications Grants Mor	itoring Closeout				
Q Search -	Grantee Activity Repo	rts				Cano	zel Save
Search	EGMS ID PR-GAR-2214		Status Created	Submitted On			
- Teste	-	n text					
Tasks – My Tasks – Pending Tasks		0		0		0	
Completed Tasks		Created		Submitted to Grantor		Approved	
Reassign Tasks	<b>F</b> • • •	0.000 0.000 0.000		- Der over D		<ul> <li>Required to Save A Req</li> </ul>	quired to Submit
📁 Activities 🛛 –	Overview	O GAR - Staff Case Serv	ices SGAR - PAI Case S	ervices 🗗 Other GAR Forms 🤏	Collab		
Organization – Grantee Profile		vel Forms					≡
GAR Report	▲ Service Area	a Form(s)					≡
Recently Viewed –     PR-GAR-2214					hics, and Categories of Private Attorney Involvem AR Guidance Document. For technical guidance,		
Volunteer Lawyers Project							
Volunteer Lawyers Project PR-GAR-2214	Search						Т
Volunteer Lawyers Project	Showing 1 to 1 of Service Area	Type	Form Validated?	Last Modified By ID	Last Modified Date	Actions	
Volunteer Lawyers Project							
2022 PBIF Transformation	MA-11	General	×	manu admin	11/15/2021 10:00 AM	۲	
2022 PBIF Project				Total Records: 1			
PR-GAR-2326							
PR-GAR-2302						Can	cel Save
Technical Support –							

Figure 2: Image of Search Box for Service Areas

Start by clicking on the **green eyeball icon** next to each respective service area. This will open the **Service Area Form**.

GRANTEASE	Grants Manager	nent System				😽 As a Grantoe 🗸 🙆 🗸	LSC America's Partner for Equal Justice
<	Opportunities	Applications Grants Monitoring	Closeout				
Q Search -	Grantee Activity Repo	ans					Cancel Save
SearchQ	EGMS ID PR-GAR-2214		Status Created	Submi	tted On		
Tasks -	Page instructio	in text					
My Tasks -				0		0	
Pending Tasks		Created		Submitted to Gra	ntor	Approved	
Completed Tasks Reassign Tasks		_	-	_		Required to Save	e 🛕 Required to Submit
🛤 Activities 🛛 –	Overview	O GAR - Staff Case Services	GAR - PAI Case Services	Other GAR Forms	Collab		
Organization – Grantee Profile	✓ Grantee Lev	vel Forms					≡
GAR Report	A Service Are	a Form(s)				17: T	=
Recently Viewed     PR-GAR-2214     Volunteer Lawyers Project					mographics, and Categories of Private Attorn 2021 GAR Guidance Document. For technic		each form
Volunteer Lawyers Project	Search	Q					T
PR-GAR-2214	Showing 1 to 1 of	and the second se					
Volunteer Lawyers Project	Service Area	Туре	Form Validated?	Last Modified By ID	Last Modified Date	e Actions	
Volunteer Lawyers Project 2022 PB/F Transformation	MA-11	General	ж	manu admin	11/15/2021 10:00 A	M 🔘	
2022 PBIF Project				Total Records: 1			
PR-GAR-2326							
PR-GAR-2302							Cancel Save
Technical Support -							

Figure 3: Image of the View Icon for a Service Area

GRANTEASE	Grants Management System				itee 🖌 🔼 🗸	LEGAL SERVICES CORPO
<	Opportunities Applications Gra	ants Monitoring Closeout				
Search –	GAR Service Area Level Forms			Service	Validate Er Area Level Forms	orm Erlit Back
. ·	Service Area MA-11	Type General		Reporting Year 2021	4	<u>ک</u>
Tasks – r Tasks – Pending Tasks Completed Tasks	Expenses Revenue Staff		A Categories	and have evel a second information		
Reassign Tasks Activities – ganization –	plot te unaudity mation. Pleas per d in Native A can Tribal cou To u te the amount an expense to to s the informatic flease note that	ter in non-LSC expension of the providence of th	support for the provision of civil legal a please the Expenses section of the 2021 G n the ounts for both LSC and non-LSC expense	AR Guidance Documen ditures for the service as		e Area
iAR Report		e Form <sup>®</sup> button in the top right or bottom right corner of this screen; Gra		ecorrect. When all inform ientify any issues requiri	evel I	Forms
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ARR Report Recently Viewed RCAR2214 Junteer Lawyers Project RCAR2224 Junteer Lawyers Project Junteer Lawyers Project Junteer Lawyers Project Joz2 PBIF Transformation Joz2 PBIF Project R-GAR-2302	actores, pasae cick with the "Validat 2021 Grantee Activity Report can be su <b>Expenses</b> Search Showing 1 to 24 of 24 records <b>Expense Type</b> <b>Expense Group : Personnel Expen</b> Lanyers Wages Paralogais Wages	o Form Jutton in the top right or bottom right corner of this screen; Gra	ntEase will review the information entered and id	sorted by Expense Group ascen	nding order, Sort C Total \$0.00 \$0.00	Order ascending orde Actions
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Figure 4: Image of the Navigation Dropdown box and Each Service Area Level Form

It is important to note that the tabs present on the Service Area Level Forms are dependent on the **type** of service area.

In this Service Area Form example, we see "*Expenses*," "*Revenue*," "*Staff Open Cases*," "*PAI Open Cases*," "*Demographics*," and "*PAI Categories*." Users should complete <u>ALL</u> tabs that appear for their respective Service Area Form(s).

## Service Area Form(s) – Expenses

On the first tab, **Expenses**, users will see a table categorized into two sections of **Expense Groups: Personnel Expenses** and **Non-Personnel Expenses**.

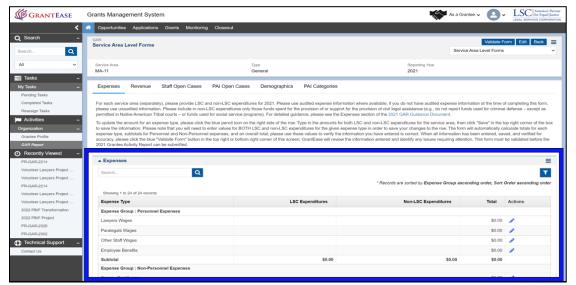


Figure 5: Image of the Personnel Expenses, Non-Personnel Expenses Table of the Service Area Level -Expenses Form

# 2021 GAR Reporting Guidance

For more details on each of these sections, please visit the GAR Reporting Guidance document.

To understand editing a data field, let's examine **Expense Group: Personnel Expenses**: Lawyers Wages and Paralegal Wages.

Be aware that users should only enter data as necessary. Fields are pre-set to zero; thus, users should not edit that field if they have no data to enter.

s de la companya de l	Grants Manage	ement Sys	tem					33	🛛 As a Grantee 🗸 🛛 🧧	LSC America's Partner for Equal Justice     LEGAL REPORTS
> *	Opportunities	Applications	Grants Monitorin	g Closeout						
	GAR Service Area Leve	el Forms							Valida Service Area Level Fo	te Form Edit Back =
⊘ ⊕	Service Area MA-11				Type General		Reporting Yi 2021	ar		
	Expenses Re	evenue	Staff Open Cases	PAI Open Cases	Demographics	PAI Categories				
	information. Please i	include in non-	LSC expenditures only	those funds spent for th	e provision of or suppo		e available; if you do not have audited expense infor istance (e.g., do not report funds used for criminal de			
	Please note that you Personnel expenses	u will need to e s, and an overa	nter values for BOTH L all total; please use thes	SC and non-LSC expen e values to verify the inf	ditures for the given ex formation you have ent	pense type in order to save your ch ered is correct. When all information	nd non-LSC expenditures for the service area, then anges to the row. The form will automatically calcula has been entered, saved, and verified for accuracy ated before the 2021 Grantee Activity Report can be		rm Pre-I Zero	Populates
	▲ Expenses			_						
	Search			۹			* Records are so	ted by Expense G	roup ascending or	prt Order ascending order
	Showing 1 to 24 o	of 24 records						-		
	Expense Type	· Personnel F	vnenses			LSC Expenditures	Non-LSC	Expenditures		Actions
	Lawyers Wages								\$0.00	1
	Paralegais wages	5							\$0.00	1
	Other Staff Wages	6							\$0.00	1
	Employee Benefit	ts							\$0.00	1
	Subtotal					\$0.00		\$0.00	\$0.00	
	Expense Group :	: Non-Person	nel Expenses							
	Space - Rent/Lea	150							\$0.00	1

Figure 6: Image of the Pre-populated Zeros on the Expenses Form

Click on the **blue pencil icon** next to the field. This will open LSC Expenditures and Non-LSC Expenditures.

5	Grants Manag	gement Sy	stem								<b>8</b> ~	LEGAL SERVICES COR
*	Opportunities	Applications	Grants Monito	ing Closeout								
	<sup>3AR</sup> Service Area Lev	vel Forms								Service Area L		rm Edit Back
	Service Area MA-11				Type General			Reporting Ye 2021	ar			
Γ.	Expenses F	Revenue	Staff Open Cases	PAI Open Cases	Demographics	PAI Categories						
	information. Please	e include in no	n-LSC expenditures of	nly those funds spent for	the provision of or supp	e audited expense information when ort for the provision of civil legal ass GAR Guidance Document.						
	Personnel expense					xpense type in order to save your cl tered is correct. When all informatic	hanges to the row. The form		e totals for each ex			
		es, and an ove	rall total; please use th	ese values to verify the	information you have en		hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy,	e totals for each ex please click the bli	ue "Validate Form"	" button in th	e top right or bottom
	right corner of this	es, and an ove	rall total; please use th	ese values to verify the	information you have en	tered is correct. When all informatic	hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy, lee Activity Report can be	te totals for each explease click the blo please click the blo submitted.	lue "Validate Form"	Edit	e top right or bottom
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	right corner of this  Expenses Search  Showing 1 to 24 Expense Type	es, and an ove screen; Grant of 24 records	rall total: please use the in Ease will review the in	ese values to verify the formation entered and id	information you have en	tered is correct. When all information	hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy, see Activity Report can be e Activity Report can be " Records are sort	e totals for each explease click the bla submitted.	roup ascending o	" button in th Edit order, Sort	e top right or bottom Icon
	right corner of this  Expenses Search  Showing 1 to 24 Expense Type Expense Group Lawyers Wages Paranegaes vege	es, and an ove screen; Grant of 24 records o - Personnel ces	rall total: please use the in Ease will review the in	ese values to verify the formation entered and id	information you have en	tered is correct. When all information	hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy, see Activity Report can be e Activity Report can be " Records are sort	e totals for each explease click the bla submitted.	roup ascending o	* button in th Edit order, Sort Total S0.00	e top right or bottom
1	right corner of this Expenses Search Showing 1 to 24 Expense Type Expense Group Lawyers Wages Patronguis verge Other Staff Wag	es, and an ove screen; Grant of 24 records or Personnel s ses	rall total: please use the in Ease will review the in	ese values to verify the formation entered and id	information you have en	tered is correct. When all information	hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy, see Activity Report can be e Activity Report can be " Records are sort	e totals for each explease click the bla submitted.	roup ascending o	Total	der ascending ord
1	right corner of this Expenses Showing 1 to 24 Expense Type Expense Group Lawyers Wages Paralegias vog Other Staff Wag Employee Bene	es, and an ove screen; Grant of 24 records or Personnel s ses	rall total: please use the in Ease will review the in	ese values to verify the formation entered and id	information you have en	tered is correct. When all informatic rg attention. This form must be valid	hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy, see Activity Report can be e Activity Report can be " Records are sort	te totals for each exp please click the blue submitted.	roup ascending o	Total	der ascending ord
1	right corner of this Expenses Search Showing 1 to 24 Expense Type Expense Group Lawyers Wages Patronguis verge Other Staff Wag	es, and an over screen; Grant of 24 records b - Personnel ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ; ;	rall total; please use the case will review the in the second sec	ese values to verify the formation entered and id	information you have en	tered is correct. When all information	hanges to the row. The form on has been entered, saved,	will automatically calculat and verified for accuracy, see Activity Report can be e Activity Report can be " Records are sort	e totals for each explease click the bla submitted.	roup ascending o	Total	der ascending ord

Figure 7: Image of Using the Edit Icon to Enter Data for an Expenditure

	Grants Management System				**	As a Grantee 🗸 🔼	✓ LSC America's Partner for Equal Justice
>	A Opportunities Applications Grants	Monitoring Closeout					LEGAL SERVICES CORPORATION
a III 📱	GAR Service Area Level Forms					Validate Service Area Level Form	ns Edit Back E
© ⊕	Service Area MA-11		Type General		Reporting Year 2021		
	Expenses Revenue Staff Ope	n Cases PAI Open Cases	Demographics PAI Categori	98			
	information. Please include in non-LSC expe used for social service programs). For detail To update the amount for an expense type, p Please note that you will need to enter value Personnel expenses, and an overall total; ple	nditures only those funds spent for the p ad guidance, please see the Expenses s ilease click the blue pencil icon on the ri s for BOTH LSC and non-LSC expendit ase use these values to verify the infor	provision of or support for the provision section of the 2021 GAR Guidance Do ight side of the row. Type in the amoun tures for the given expense type in ord mation you have entered is correct. W	of civil legal assistance (e.g cument. ts for both LSC and non-LS4 or to save your changes to the nen all information has been	If you do not have audited expense information at the time of , do not report thinks used for criminal defense – except as , expenditures for the service area, then click "Save" in the to erow. The form will automatically calculate totals for each en- eroe, the form valid automatically calculate totals for each en- eroed, sevel, and verified for accuracy, please click the bi- the 2021 Grantee Activity Report can be submitted.	permitted in Native America op right corner of the box to pense type, subtotals for F	in Tribal courts – or funds o save the information. Personnel and Non-
	Saved Successfully!	Negative	e Values will	]			×
	▲ Expenses	display ir	n parentheses				=
	Search		n saved.		* Records are sorted by Expense G	roup ascending order, So	rt Order ascending order
	Showing 1 to 24 of 24 records Expense Type		LSC E	xpenditures	Non-LSC Expenditures	Total	Actions
	Expense Group : Personnel Expenses			1			
	Lawyers Wages		$\boldsymbol{\Sigma}$		\$200.00	\$400.00	1
	Paralegals Wages			((\$50.00))	\$100.00	\$50.00	1
	Other Staff Wages			$\smile$		\$0.00	1
	Employee Benefits					\$0.00	1
	Subtotal			\$150.00	\$300.00	\$450.00	

Figure 8: Image of Successfully Saved Data and Negative Values Displaying in Parentheses

Here, unlike other fields, negative values are acceptable.

If a user needs to remove data, they should click on the **Undo icon** (**>**).

Grants Management Sys	stem			🐝 As a Grantee 🗸 🙆 🗸	LSC America for Equi
Opportunities Applications	Grants Monitoring Closeout				
GAR Service Area Level Forms				Validate Fo Service Area Level Forms	orm Edit Back
Service Area MA-11		Type General	Reporting Year 2021		
Expenses Revenue	Staff Open Cases PAI Open Cases	Demographics PAI Categories			
used for social service programs). To update the amount for an expe Please note that you will need to o Personnel expenses, and an over	For detailed guidance, please see the Expen inse type, please click the blue pencil icon on anter values for BOTH LSC and non-LSC exp all total; please use these values to verify the	uses section of the 2021 GAR Guidance Document. the right side of the row. Type in the amounts for both LSC ar enditures for the given expense type in order to save your ch information you have entered is correct. When all information	stance (e.g., do not report funds used for criminal defense – ex d non-LSC expenditures for the service area, then click "Save anges to the row. The form will automatically calculate totals for has been entered, saved, and verified for accuracy, please of the between entered of the second of the	" in the top right corner of the box to sa or each expense type, subtotals for Pen lick the blue "Validate Form" button in th	ive the information. sonnel and Non+
Expenses	ase will review the information entered and id	enniny any issues requiring attention. This form must be valida	ted before the 2021 Grantee Activity Report can be submitted		o Icon
Search	Q			Onac	, reon
Showing 1 to 24 of 24 records			* Records are sorted by Exp	pense Group ascending order, Sort C	er ascending or
Expense Type		LSC Expenditures	Non-LSC Exper	nditures Total	ions
Expense Group : Personnel E	Expenses				
Lawyers Wages		200		200 \$0.00	5)
Paralegals Wages		-50		100 \$0.00	5
Other Staff Wages				\$0.00	1
Employee Benefits				\$0.00	
					1
Subtotal		\$150	.00	\$300.00 \$0.00	1
Subtotal Expense Group : Non-Person	nel Expenses	\$150	.00	\$300.00 \$0.00	1

Figure 9: Image of Removing Data from a Field

Users will also see a **Subtotal** for each **Expense Group** on the form. At the bottom of the table, users will see totals for each column and a final **Total** for the entire form.

Grants Management System			As a Grantee 🗸 🙆 🖌 LSC
Opportunities Applications Grants Monitoring Closeout			
		* Records are sorted by Expense	Group ascending order, Sort Order ascendi
Showing 1 to 24 of 24 records			
Expense Type	LSC Expenditures	Non-LSC Expenditures	Total Actions
Expense Group : Personnel Expenses			
Lawyers Wages	\$200.00	\$200.00	\$400.00 🥜
Paralegals Wages	(\$50.00)	\$100.00	\$50.00 🥜
Other Staff Wages			so.oo 🥒
Employee Benefits			\$0.00 🥜
Subtotal	\$150.00	\$300.00	\$450.00
Expense Group : Non-Personnel Expenses			
Space - Rent/Lease			~ /
Mortgage Payments			
Other Space Expense			
Equipment Rental			
Office Supplies			
Telephone			0 /
Travel - Board			
Travel - Staff/Other			0 /
Training - Board			
Training - Staft/Other			
Library			
Insurance			
Dues and Fees			
Audit			
Litigation			
Property Acquisition			
Purchase Payments			
Contract Services to Clients			
Contract Services to Recipient			
Other	•		\$0.00
Subtotal	\$0.00	\$0.00	\$0.00
Total	\$150.00	\$300.00	\$450.00

Figure 10: Image of the Subtotals & Totals for the Expenses Form of the Service Area Level Forms

# Service Area Form(s) Revenue

Once users have completed the **Expenses** tab, they should move to the **Revenue** tab.

Grants Management System		As a G
Opportunities Applications Grants Monitoring Closeout		
Expenses Revenue Staff Open Cases PAI Open Cases De	emographics PAI Categories	
permitted in Native A Can Tribal courts - or funds used for social service programs). F To update the anot provenue type, please click the blue pencil icon on the right si revenue, non-LSC i p, and client services income) and an overall total; please use	021 from LSC sources, non-LSC sources, and client services income. Please include only For detailed guidance, please see the Revenue section of the 2021 GAR Guidance Docur ide of the row. Type in the amount for the service area, then click "Save" in the top right co these values to verify the information you have entered is correct. When all information h y issues requiring attention. This form must be validated before the 2021 Grantee Activity	ment. primer of the box to save the information. The form will automatically calcula as been entered, saved, and verified for accuracy, please click the blue "V
search		
Showing 1 to 28 of 28 records		* Records are sorted by Revenue Type as
Revenue Type	Fund Codes	Amount
Revenue Type : LSC Revenue		

Figure 11: Image of the Service Area Level - Revenue Form

Here, users will see a table categorized into three sections of **Revenue Types**: LSC **Revenue**, **Non-LSC Revenue**, and **Client Service Income**.

Revenue		:
earch		* Records are sorted by Revenue Type ascending order, Sort Order ascending orde
Showing 1 to 28 of 28 records		
Revenue Type	Fund Codes	Amount Actions
Revenue Type : LSC Revenue		
aalo hidu	10	
nterest Investment & Other Income	28	1
Attorney Fee Awards (LSC)	22	1
ublication Income (LSC)	23	1
Carryover Funds (LSC)	24	1
ther Grants i.e. TIG Disaster	20	1
and a start		60.60
Revenue Type : Non-LSC Revenue		
IHS Grants	30	/
Dider Americans Act	32	1
Violence Against Women Act	33	

Figure 12: Image of the Sections of the Service Area Level – Revenue Form

Users should start with the **Revenue Types**: LSC Revenue section. Here, users will see information on all support and revenue from all sources during the year, their corresponding fund codes, and the amount associated.

Grants Management System		As a Grantee 🗸 💽 🗸 LSC for LEGAL SERVICES
Opportunities Applications Grants Monitoring Closeout		
▲ Revenue		
Search		
		* Records are sorted by Revenue Type ascending order, Sort Order ascending
Showing 1 to 28 of 28 records		
Revenue Type	Fund Codes	Amount Actions
Revenue Type : LSC Revenue		
Basi	10	
Intere stment & Other Income	28	1
Attorn B Awards (LSC)	22	1
Public ncome (LSC)	23	1
Carry unds (LSC)	24	1
Other Grants i.e. TIG Disaster	20	1
Subtotal		\$0.00
Revenue Type : Non-LSC Revenue		
HHS Grants	30	1
Older Americans Act	32	1
Violence Against Women Act	33	1

Figure 13: Image of the Data Entry Columns for LSC Revenue

Þ	Grants Management System		As a Grantee • O • LSOC America's Part
> 👘	Opportunities Applications Grants Monitoring Closeout		
۹.	▲ Revenue		=
	Search Q		* Records are sorted by Revenue EDIT ICON nding order
<b>b</b>	Showing 1 to 28 of 28 records		
	Revenue Type	Fund Codes	Amount / ons
	Revenue Type : LSC Revenue		
	Basic Field	10	
	Interest Investment & Other Income	28	1
	Attorney Fee Awards (LSC)	22	1
	Publication Income (LSC)	23	1
	Carryover Funds (LSC)	24	

To enter data into the fields, users should click on the **blue pencil icon** 

Figure 14: Image of Selecting the Edit Icon on a Revenue Type on the Service Area Level Form

Remember, users should only report funds received for provision of civil legal services (e.g., do not report funds used for criminal defense – except as permitted in Native American Tribal courts – or funds used for social service programs.)

ants Management System			As a Grantee - Contract Particular Particula
Opportunities Applications Grants Monitoring C	loseout		
To update the amount for a revenue type, please click the blue p automatically calculate subtotals for each revenue category (LSC information has been entered, saved, and verified for accuracy, p itontion. This form must be validated before the 2021 Grantee A	C revenue, non-LSC revenue, and client services inco blease click the blue "Validate Form" button in the top	me) and an overall total; please use these values to v	
▲ Revenue			Save
Search		* Records are sorted by	Revenue Type ascending order, Sort Order a
Revenue Type	Fund Codes		Amount Actions
Revenue Type : LSC Revenue			
Basic Field	10		
Interest Investment & Other Income	28	Field is required	C
Attorney Fee Awards (LSC)	22	Field is required	C
Publication Income (LSC)	23	Field is required	c
Carryover Funds (LSC)	24	Field is required	c
Other Grants i.e. TIG Disaster	20	Field is required	C
Subtotal			\$0.00
Revenue Type : Non-LSC Revenue			
HHS Grants	30		-
Older Americans Act	32		
Violence Against Women Act	33		1
HUD Grants	36		1
Other Federal Grants	34		

Users should click on SAVE before moving on to a new section.

Figure 15: Image of Saving a Section of the Revenue Form and a Highlighted Next Section

After users have completed the **Revenue Type**: **LSC Revenue** section, they should proceed to the **Revenue Type**: **Non-LSC Revenue** and **Revenue Type**: **Client Services Income** sections. Users should remember to click on the **Save button** after completing the form. Users will see a **Subtotal** for each **Revenue Type** and a final **Total** for all sections.

	Tribal Contracts	60		1
	Other Funds	90		1
	Publish		Save B	utton
	Revenue Type : Client Service Income		Save D	ution
11	Gross Fees and Receipts from Client Services	57	45,004	
	Other Income Earned in For-Profit Activities	58		1
١.	Subtotal		\$45,000.00	
	Total		\$126,000.00	
		Total Records:28	\$0.00	
F	orm Number Form Version			Back Save

Figure 16: Image of Selecting the Save Button on the Revenue Form in Service Area Forms

## 2021 GAR Reporting Guidance

For more details on each of these sections, please visit the GAR Reporting Guidance document.

#### Service Area Form(s) Staff Open Cases

Users will then select the **Staff Open Cases** tab (and **PAI Open Cases** tab, if relevant). The **Open Cases** tabs capture information on Staff and PAI Cases closed during the calendar year in question.

(C)	Grants Management System			**	As a Grantee 🗸	8-	LSC America's Parmer for Equal Justice
>	🚯 Opportunities Applications Grants Monitoring Closeo	ut 🗳 🗩					
a 🖩 📱	GAR Service Area Level Forms	Applications Grants Monitoring Closeout Canada Cana	Edit Back =				
⊙ ⊕	Service Area CA-28						
Ť	Expenses Revenue Staff Open Cases PAI Open	n Cases Demographics PAI	Categories				
	LSC Revenue						=
	Search				* Records are sorte	d by Sort Ord	er ascending order
	LSC Revenue	Fun	d Codes		Amount	Actions	
_	Basic Field	10			\$4,517,741.00		
	Interest Investment & Other Income	28				1	
	Attorney Fee Awards (LSC)	22				1	

Figure 17: Image of the Navigating to the Service Area Level - Staff Open Cases Form

Closed cases data are the primary measure of the amount and levels of legal assistance grantees provide LSC-eligible people to address the range of civil legal problems they confront.

To enter data, users should click on the **blue pencil icon** and enter data into each field.

GRANTEASE	Grants Managem	nent System				As a Grantee - LSC America's Par LEOAL Strances Control
<	Opportunities	Applications Grants	Monitoring Closeout 🕓	۰		
Search –						Service Area Level Forms
iearch Q	Service Area CA-28			<sup>ipe</sup> ieneral		Reporting Year 2021
All ~						Edit Icon Required for Subm
Tasks –	Expenses F	Revenue Staff Op	PAI Open Case	s Demographics	PAI Categories	
ly Tasks Pending Tasks	Staff Open C	Cases				=
Completed Tasks	Search		Q			T
Reassign Tasks						* Records a d by Sort Order ascending order
Activities -	Problem Categ	ory				Staff Open Cases Actions
rganization -	Consumer	,				
Grantee Profile	Education					
Recently Viewed +						
Technical Support –	Employment					1
Contact Us	Family					1
	Juvenile					Ø
	Health					1
	Housing					1
	Income					1
	Individual Rights	5				1
	Misc					1
						0
					Total Records:10	
	GovGrants					

Figure 18: Image of the Edit Icon for the Staff Open Cases Form

If users mistakenly click the **blue pencil icon** but do not wish to enter data, they should click the Undo icon (**>**) to remove all data from that row.

GRANTEASE	G	Grants Management System	As a Grantee  As
•	*	🕈 Opportunities Applications Grants Monitoring Closeout 😍 🗩	
Q Search			★ Required for Save A Required for Submit
Search Q		Expenses Revenue Staff Open Cases PAI Open Cases Demographics PAI Categories	Linda Jaan
All 🗸		▲ Staff Open Cases	Undo Icon 📰
Tasks ·	1	Search Q	
My Tasks ·			* Records are so y Sort Order ascending order
Pending Tasks		Problem Category	Staff Open Cases ons
Completed Tasks Reassign Tasks		Consumer Field is required	
Activities		Education Paid is required	
Grantee Profile		Employmont Field is required	c
Technical Support		Family	1
Contact Us		Juvenile	1

Figure 19: Image of Removing Data Entries from the Form Using the Undo Icon

If a table is open for editing, users should select the **Save** button for the table before moving on to the next tab.

GRANTEASE	Grants Manage	ement Syste	m				As a Grantee	~ 🙆	LSC America's Par for Equal Just LEDAL SERVICES CORPORA
<	Opportunities	Applications	Grants Monitoring	Closeout 🕓	•				
<b>)</b> Search –								Required for Sa	we 💧 Required for Subm
Search Q	Expenses	Revenue	Staff Open Cases	PAI Open Cases	Demographics	PAI Categories			
ui 🗸	▲ Staff Open	Cases							Save
Tasks –	Search		Q						
fy Tasks —							* Records are	sorted by Sort	Order ascer gorder
Pending Tasks	Problem Cate	egory					Staff Open Cases	Actions	
Completed Tasks	Consumer				1			5	
Reassign Tasks	Consumer				Field is required				
Activities –	Education							5	Same
rganization – Grantee Profile					Field is required				Save
Recently Viewed +	Employment				Field is required			5	Save Button
Technical Support -	Family								Duiton
Contact Us	Juvenile								
	Health								
	Housing								
	Income								
	Individual Rig	hts							
	Misc								
							0		
						Total Records:10			
	Form Number 134	Form Version		_	_			_	Back Save
	GovGrants	T and Toronom				Terms of Use I Privacy Policy		-	Dack Save

Figure 20: Image of Selecting the Save Button on the Staff Open Cases Form

NOTE:

- If the Service Area is a General Service Area, then users will see the **PAI Open Cases** tab.
- Users should complete the **PAI Open Cases** tab the same way they completed the Staff Open Cases tab and save the information before moving to the **Demographics** tab.
- If the Service Area is a Native or Migrant Service Area, users will not see this tab and can move on to the **Demographics tab**.

# Service Area Form(s) Demographics

The **Demographics** tab collects data about the age, race/ethnicity, gender, and veteran status of LSC-eligible clients in LSC-eligible cases in the reporting year, regardless of whether LSC funds were used to deliver these services.

GRANTEASE	Grants Managem	nent System					As a Gra	ntee 🗸 🙆 🗸	LSC America's Part for Equal Just
<	Gpportunities	Applications	Grants Monitoring	Closeout					
<b>)</b> Search –							Servic	e Area Level Forms	~
Search Q	Service Area CA-28				Type General		Reporting Year 2021		
All 🗸						-		Required for Save	A Required for Subm
🗄 Tasks –	Expenses R	Revenue S	taff Open Cases	PAI Open Ca	ses Demographic	PAI Categories			
Ay Tasks —	▲ Staff Open C	ases			_				=
Pending Tasks Completed Tasks									
Reassign Tasks	Search		Q						T
Activities -								are sorted by Sort Ord	ter ascending order
Organization -	Problem Catego	ory					Staff Open Cases	Actions	
	Consumer							ø	
Recently Viewed +	Education								
Technical Support –	Employment								
Contact Us	Family								
	Juvenile								
	Health								
	Housing								
	Income								
	Individual Rights								
	Misc								
							c	1	

Figure 21: Image of Navigating to the Demographics Tab

It is important that users understand some key characteristics of the **Demographics** tab.

- Users should report information from all reporting year closed cases, as reported on the GAR Case Services form for the Service Area.
- Users should also report data for all clients, whether served by staff or by PAI and enter data for each demographic sub-category like female, male, other, unknown; this total will be calculated automatically.

Users can start this data entry by clicking on the **blue pencil icon** next to **Group**, entering the total number of clients, and selecting the **Save** button.

Users should repeat this process for relevant Gender and Veteran Status sections.

GRANTEASE	Grants Management System	As a Grantee - Contract Partner LEON America's Partner LEON America's Partner LEON America's Partner LEON America's Partner
<	🕋 Opportunities Applications Grants Monitoring Closeout 🕓 🗩	
Q Search –	GAR Service Area Level Forms	Cancel Save Service Area Level Forms ~
All 👻	Service Area Type CA-28 General	Reporting Year
Tasks –		Edit Icon ed for Save A Required for Submit
Pending Tasks	Expenses Revenue Staff Open Cases PAI Open Cases Demographics PAI Categories	Lait feen
Completed Tasks Reassign Tasks	Number of Group Clients	=
Activities – Organization –	Search	* Re ds are sorted by Created Date ascending order
Grantee Profile O Recently Viewed +	Title	Number of Clients Actions
Contact Us	Group Total Records:1	
	▼ Gender	=
	✓ Veteran Status	=
	← Ethnicity	=
	▼ Language	=
	Form Number 134 Form Version	Back Save
	GovGrants Terms of Use I Privacy Policy	· · · · · · · · · · · · · · · · · · ·

Figure 22: Image of Selecting the Edit Icon for the "Number of Group Clients" Section

GRANTEASE	Grants Management System	As a Grantee • O • LSC America's Parmer LEGAL EEVICES CONTRACTOR
<	🛠 Opportunities Applications Grants Monitoring Closeout 😌 🗩	
Q Search –	GAR Service Area Level Forms	Cancel Save Service Area Level Forms 🗸
All 🗸	Service Area Type CA-28 General	Reporting Year 2021
Tasks – My Tasks – Pending Tasks	Expenses Revenue Staff Open Cases PAI Open Cases Demographics PAI Categories	Required for Save     A Required for Submit
Completed Tasks Reassign Tasks Activities —	Number of Group Clients  Search.  Q	Save
Organization – Grantee Profile O Recently Viewed + ① Technical Support –	Titie Group 123	Number of Clients Actions
Contact Us	Total Records:1	=

Figure 23: Image of Entering Data in Edit Mode and Selecting the Save Button

GRANTEASE	Grants Management Sys	stem				**	As a Grantee 🗸 🙆 🗸	LEGAL SERVICES CORPORATIO
<	A Opportunities Application	ns Grants Monitorin	ig Closeout 🕓	<b>ب</b>				
Q Search -	GAR							Cancel Save
Search Q	Service Area Level Form						Service Area Level Forms	~
All	Service Area CA-28		Typ	e neral		Reporting Year 2021		
📑 Tasks —							Required for Save	A Required for Submit
My Tasks —	Expenses Revenue	Staff Open Cases	PAI Open Cases	Demographics	PAI Categories			_
Pending Tasks Completed Tasks				Leure 9. chi see				
Reassign Tasks	Saved Successfully!							×
📁 Activities –	Saved Successionyr							^
Organization -	A Number of Group Cl	ents						=
Grantee Profile	Search	Q						T
Recently Viewed +		-					Records are sorted by Created I	
Technical Support –								Date ascending order
Contact Us	Title					Number of Clients	Actions	
	Group					123	1	

Figure 24: Image of the Successfully Saved Message

ants Management	System					As a Grantee 🗸 🔼 🗸	LEGAL BERVICES CORPO
Opportunities Appli	ications Grants M	onitoring Closeout	¢ 🗩				
AR ervice Area Level Fe	orms					Service Area Level Forms	Cancel Save
Service Area CA-28			Type General		Reporting Year 2021		
						<ul> <li>Required for Save</li> </ul>	A Required for Sul
Expenses Reve	nue Staff Open C	ases PAI Open C	ases Demographics	PAI Categories			
Search		۹			* Re	cords are sorted by <b>Created D</b>	ate ascending orde
Gender					Number of Clients	Actions	
Men						1	
Women						de la companya	
Other							
Unknown							
Unknown				Total Records:4	C		

Figure 25: Image of Selecting the Gender Section of the Demographics Tab

<	🛪 Opportunities Applications Grants Monitoring Closeout 😍 🗩	
Q Search –	GAR Service Area Level Forms	Cancel Save Service Area Level Forms ~
All	Service Area Type CA-28 General	Reporting Year 2021
Tasks – My Tasks – Pending Tasks	Expenses Revenue Staff Open Cases PAI Open Cases Demographics PAI Categoriet	Required for Save     A Required for Submit
Completed Tasks Reassign Tasks	w Number of Group Clients	=
Activities –     Organization –     Grantee Profile	← Gender	=
Recently Viewed +     Technical Support -	Search	* Records are sorted by Created Date ascending order
Contact Us	Veteran Status	Number of Households Actions
	Non-Veteran Veteran	2
	Unknown	0
	Total Records.3	
	+ Language	=
	GovGrants Terms of Use I Prit	vacy Policy

Figure 26: Image of Selecting the Veterans Status Section of the Demographics Tab

Users should then move on to the **Age & Race/Ethnicity** section, where they will enter the *ethnicity/race* and corresponding *ages* in each group by clicking on the **blue pencil icon** for each row.

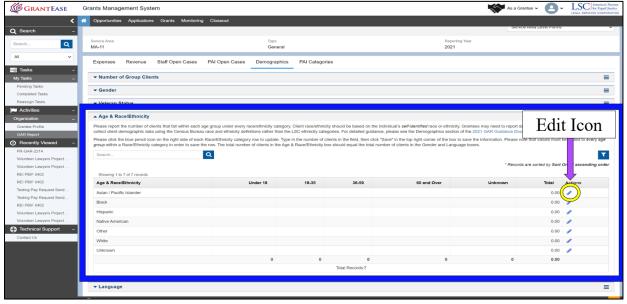


Figure 27: Image of Edit Mode for the Age & Race/Ethnicity Section of the Demographics Tab

Users should only enter data relevant to their reporting and select <u>Save</u> after each section to avoid losing important data.

E Tasks -	+ Gender							
My Tasks	+ Veteran Status							;
Pending Tasks Completed Taska	Ethnicity							Save
Reassign Tasks	Sector.	9						
Activities –						* Records are sorted by Se	rt Order asce	anding ord
Organization –	Ethnicity	Under 18	18-35	36-	59 60 and Over	Unknown	Total	Actions
Grantee Profile Recently Viewed –	Arian ( Deally Islander	10000000000000					0.00	
PR0617	Black		57	1		11	0.00	0
Bay Area Legal Aid		Feid is regulated		Field is required	Field is required	Field is required		
Say Area Logal Aid								
ite visit 13 Jan	Native American						0.00	1
ite visit 13 Jan	Other						0.00	1
ICK, ME BEG DIRECTED	White						0.00	1
PICK_ME BEG DIRECTED	A second s						0.00	



							- Veteran Status	My Tasks -
,							Saved Successfully!	Pending Tasks Completed Tasks Reassign Tasks
							+ Ethnicity	Activities -
der ascending of	vteri hv Sort Om	* Records are so				٩	Search	Organization — Grantee Profile
-	Total	Unknown	60 and Over	36-59	18-35	Under 18	Ethnicity	Recently Viewed -
1	0.00						Asian / Pacific Islander	Bay Area Legal Aid
1	57.00	0	0	0	57	0	Black	Bay Area Logal Aid
1	0.00						Hispanic	Site visit 13 Jan Site visit 13 Jan
	0.00						Native American	ICK_ME BFG DIRECTED
/							Other	ICK_ME BFG DIRECTED
1	0.00							B0005
1	0.00						White	
1							White Unknown	E_TOO COMPETITIVE

Figure 29: Image of Successfully Saved Message in the Demographics Tab

In the **Language** section, users will see many options. Users can type into the search box and locate the language needed to filter through languages quickly.

GRANTEASE	Grants Management System	As a Grantee 🗸	LSC America's Parener for Equal Justice LEGAL SERVICES CONFORATION
<	M Opportunities Applications Grants Monitoring Closeout	6 🗩	
Q Search -	✓ Veteran Status		=
Search Q	✓ Ethnicity		=
All 👻			
📰 Tasks —	▲ Language		=
My Tasks -	Search Q		T
Pending Tasks		* Records are so	rted by Sort Order ascending order
Completed Tasks	Language	Number of Clients	Actions
Reassign Tasks	00 - English		1
Activities -	44 - Spanish/Spanish Creole		1
Organization -	18 - African languages		1
Grantee Profile O Recently Viewed -	10 - American Sign Language and other sign languages		1
PR0617	70 - Arabic		1
Bay Area Legal Aid	50 - Armenian		1
Bay Area Legal Aid	82 - Chinese		1
Site visit 13 Jan	75 - Farsi		1
Site visit 13 Jan	34 - French		1
PICK_ME BFG DIRECTED PICK_ME BFG DIRECTED	25 - French Creole		1
PR0005		0	
ME_TOO COMPETITIVE	Show 10 V Entries	Total Records:42	Page 1 of 5 HHH
DEMO RSLC			
Technical Support –			
Contact Us	Form Number 134 Form Version		Validate Form Edit Back
	GovGrants	Terms of Use I Privacy Policy	^

Figure 30: Image of Language Section of the Demographics Tab

GRANTEASE	Grants Management System	As a Grantee	Control Control Support State S
<	Opportunities Applications Grants Monitoring Closeout	• •	
Q Search -	✓ Veteran Status		=
Search Q	- Ethnicity		=
All 🗸			
📰 Tasks —	- Language		≡
My Tasks -	Arabid		<b>T</b>
Pending Tasks		* Records are se	orted by Sort Order ascending order
Completed Tasks	Language	Number of Clients	Actions
Reassign Tasks	00 - English		1
Activities -	44 - Spanish/Spanish Creole		1
Organization -	18 - African languages		1
Recently Viewed -	10 - American Sign Language and other sign languages		1
PR0617	70 - Arabic		1
Bay Area Legal Aid	50 - Armenian		1
Bay Area Legal Aid	82 - Chinese		1
Site visit 13 Jan	75 - Farsi		1
Site visit 13 Jan PICK_ME BFG DIRECTED	34 - French		1
PICK_ME BFG DIRECTED	25 - French Creole		1
PR0005		0	
ME_TOO COMPETITIVE DEMO RSLC	Show 10 🗸 Entries	Total Records 42	Page 1 of 5 HHH
Technical Support –	· · · · · · · · · · · · · · · · · · ·		
Contact Us	Form Number 134 Form Version		Validate Form Edit Back
	GovGrants	Terms of Use I Privacy Policy	

Figure 31: Image of the Search box for the Language Section of the Demographics Tab

GRANTEASE	Grants Management System	As a Grantee - O - LSC America's Puttere
<	🛪 Opportunities Applications Grants Monitoring Closeout 🚱 🗩	
Q Search -	GAR	Validate Form Edit Back
Search Q	Service Area Level Forms	Service Area Level Forms
All	Service Area Type	Reporting Year
	CA-28 General	2021
Tasks My Tasks	Expenses Revenue Staff Open Cases PAI Open Cases Demographics PAI Catego	ories
Pending Tasks		
Completed Tasks	→ Number of Group Clients	=
Reassign Tasks	▼ Gender	
Activities -	Gender	=
Organization -	✓ Veteran Status	=
Grantee Profile		_
Recently Viewed –	← Ethnicity	=
PR0617	Language	=
Bay Area Legal Aid	Arabic	T
Bay Area Legal Aid Site visit 13 Jan		* Records are sorted by Sort Order ascending order
Site visit 13 Jan		
PICK_ME BFG DIRECTED	Language	Number of Clients Actions
PICK_ME BFG DIRECTED	70 - Arabic	/
PR0005		0
ME_TOO COMPETITIVE	Total Records:	1
DEMO RSLC		
Technical Support –	Form Number 134 Form Version	
Contact Us	Form Number 134 Form Version	Validate Form Edit Back
avascript:void(0)	GovGrants Terms of Use	1 Privacy Policy

Figure 32: Image of Searching for and Finding "Arabic" in the Language Section

If users want to display **ALL** languages at once, they should select "Show ALL entries" from the dropdown menu at the bottom of the page.

GRANTEASE	Grants Management System	ê.	As a Grantee 🗸	LSC America's Permer     for Equal Justice     LEGAL BERVICES CONFORTION
<	Opportunities Applications	Grants Monitoring Closeout 🤩 9		
Q Search -	✓ Veteran Status			=
Search Q	- Ethnicity			=
All	▲ Language			=
📑 Tasks –	Arabid			T
My Tasks Pending Tasks		5	* Records are so	rted by Sort Order ascending order
Completed Tasks	Language		Number of Clients	Actions
Reassign Tasks	00 - English	🗸 10		1
Activities -	44 - Spanish/Spanish Creol			1
Organization – Grantee Profile	18 - African languages	20		1
Recently Viewed -	10 - American Sign Langua	20		1
PR0617	70 - Arabic	50		0
Bay Area Legal Aid	50 - Armer	50		1
Bay Area Legal Aid Site visit 13 Jan	82 - Chine			1
Site visit 13 Jan	75 - Farsi	100		0
PICK_ME BFG DIRECTED	34 - Frence			1
PICK_ME BFG DIRECTED	25 - French de	All		1
PR-0005 ME_TOO COMPETITIVE	Show 10 V Entries		Total Records:42	Page 1 of 5 HH
DEMO RSLC	Cititati In Cititati			1 000 1 01 0 1014
Technical Support –				
Contact Us	Form Number 134 Form Version			Validate Form Edit Back
	GovGrants		Terms of Use I Privacy Policy	

Figure 33: Image of Selecting "Display All Entries" in the Language Section

# NOTE: *The following are some important validation reminders:*

## Service Area Form(s) Validations for Demographics

- The sum of Gender and Groups = Total Staff and PAI case closures
- The sum of Veteran and Groups = Total Staff and PAI case closures
- The sum of Age/Ethnicity and Groups = Total Staff and PAI case closures
- The sum of Language and Groups = Total Staff and PAI case closure

#### Service Area Form(s) PAI Categories

The final tab covered in this training, the **PAI Categories** tab, will only appear if the Service Area is a General Service Area. If this is not the case, users can move to the submission section.

GRANTEASE	Grants Management System	As a Grantee - Co- LESC America's Partner LESC For Equal Justice
<	🛪 Opportunities Applications Grants Monitoring Closeout 🕓 🗩	
Q Search –	GAR Service Area Level Forms	Validate Form         Edit         Back         Edit           Service Area Level Forms
All	Service Area Type CA-28 General	Reporting Year 2021
My Tasks - Pending Tasks	Expenses Revenue Staff Open Cases PAI Open Cases Demographics PAI Categories	
Completed Tasks Reassign Tasks	Number of Group Clients	=
Activities -	▼ Gender	=
Organization Grantee Profile	✓ Veteran Status	=
Recently Viewed -	▼ Ethnicity	=
PR0617 Bay Area Legal Aid Bay Area Legal Aid	▼ Language	=
PR0657	Form Number 134 Form Version	Validate Form Edit Back

Figure 34: Image of Navigating to the PAI Categories Tab

The **Private Attorney Involvement (PAI) Categories** tab captures information about the different categories of practitioners that provide legal assistance to clients or accept cases through grantees' PAI programs.

Upon GAR submission, data entered on this tab is validated against the **PAI Case Services** tabs.

Thus, users should be aware that the total number of PAI Cases Closed in the categories of the PAI section should be equal to the total number of PAI Cases Closed reported on the Case Services tab.

If there is a discrepancy, it will appear prior to the final submission as a validation error.

GRANTEASE	G	irants Manager	ment Syste	m						200 A	is a Grantee 👻 🙆 🗸	LSC America's Partner for Equal Justice
<	*	Opportunities	Applications	Grants	Monitoring	Closeout	¢ 🗩					
Q Search –		GAR Service Area Le	vel Forms							[	Validate For Service Area Level Forms	m Edit Back 🚍
All		Service Area CA-28					Type General			Reporting Year 2021		
Tasks – My Tasks –		Expenses	Revenue	Staff Ope	en Cases	PAI Open C	ases Dem	ographics PAI Categ	ories			
Pending Tasks Completed Tasks		▲ Pro Bono										≡
Reassign Tasks		Search			Q						F	Edit Icon
Organization –										* Rec	cords are sorted by Cre	
Grantee Profile C Recently Viewed – PR0617 Bay Area Legal Aid		PAI Category	N 0 0	otal lumber f ases leferred	Total Number of Cases Closed	Total Number of Attorneys that Closed Cases	Total Numbe of Law Students/La Graduates th Closed Case	Paralegals/Other w Professionals that Closed	Total Number of Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Paralegals/Other Professionals that provided support o conducted other Pa activities	
Bay Area Legal Aid PR0657 PR0651		Pro Bono: Grar	ntee									
PR0668 PR0663				0	0	c	•	-	0 0		0	0
PR0673								Total Records	2			
Site visit 13 Jan		Compensat	ted									=

To start, users with the **Pro Bono** section should start by clicking on the **blue pencil icon**.

Figure 35: Image of Selecting Edit Mode for the Pro Bono Section of the PAI Categories Tab

This will open up all of the fields in a row. Here, users should fill out the appropriate information and click **Save** when complete. If it is necessary to remove information and start again, users should click on the **Undo icon** (**>**).

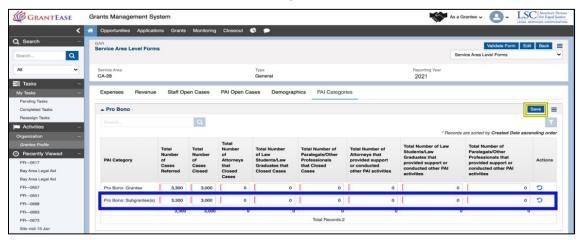


Figure 36: Image of the Undo Icon & Save Button on the Pro Bono Section of the Form

GRANTEASE	G	rants Management Sy	stem						AS	a Grantee 🗸 🔼 🗸		America's for Equal J
<	*	Opportunities Application	ons Grants	Monitoring	Closeout	e 🗩						
Search –												
arch Q		Service Area CA-28				Type General			Reporting Year 2021			
~	Г	Expenses Revenue	Staff Ope	en Cases	PAI Open Ca	ises Demograp	hics PAI Categor	ries				
Tasks –												_
Tasks —		Saved Successfully!										×
anding Tasks											_	
ompleted Tasks		▲ Pro Bono										=
eassign Tasks		Search		Q								т
Activities –		Search		4								
anization –									* Reco	rds are sorted by Created D	ate ascer	nding orde
irantee Profile Recently Viewed – R0617	Į.	PAI Category	Total Number of Cases	Total Number of Cases	Total Number of Attorneys that	Total Number of Law Students/Law Graduates that	Total Number of Paralegals/Other Professionals that Closed	Total Number of Attorneys that provided support or conducted	Total Number of Law Students/Law Graduates that provided support or	Total Number of Paralegals/Other Professionals that provided support or		Actions
ay Area Legal Aid			Referred	Closed	Closed	Closed Cases	Cases	other PAI activities	conducted other PAI activities	conducted other PAI activities		
ay Area Legal Aid					Cases				uctivities	activities		
R0657		Pro Bono: Grantee	3,300	3,000	0	0	0	0		0	0	ø
R0651		Pro Bono: Subgrantee(s)	3,300	3,000	0	0	0	0		0	0	a
R0668			6,600	6,000	0	0	0	0		0	0	
R0663		L		.,			Total Records:2					
R0673												
te visit 13 Jan												
ite visit 13 Jan		Compensated										=

Figure 37: Image of Successfully Saved Message and the Totals Row for the PAI Categories Tab

Once finished with the Pro Bono Section, users should move onto the **Compensated Section** and repeat this process.

<	*	Opportunities Applicatio	ns Grants	Monitoring	Closeout	© 🗩					
Search –		PAI Category	Number of Cases	Total Number of Cases Closed	Number of Attorneys that Closed Cases	Total Number of Law Students/Law Graduates that Closed Cases	Total Number of Paralegals/Other Professionals that Closed Cases	Total Number of Attorneys that provided support or conducted other PAI activities	Students/Law Graduates that provided support or conducted other PAI activities	Paralegals/Other Professionals that provided support or conducted other PAI activities	Actions
		Pro Bono: Grantee	3,300	3,000	C	0	0	c		0	0 🥒
Tasks –		Pro Bono: Subgrantee(s)	3,300	3,000	0	0	0	c		0	0 🥜
Tasks –			6,600	6,000	0	0	0			0	0
ending Tasks							Total Records:2				
ompleted Tasks eassign Tasks											
		Search		Q					* Bacos	de are sorted by Created Date	
Recently Viewed — R0617 ay Area Legal Aid ay Area Legal Aid R0657		PAI Category	Total Number of Cases Referred	Total Number of Cases Closed	Total Number of Attorney that Closed Cases	Total Number of Law Students\Law Graduates that Closed Cases	Total Number of Paralegals/Other Professionals that Closed Cases	Total Number of Attorneys that provided support or conducted other PAI activities	* Recor Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	ds are sorted by Created Date . Total Number of Paralegals/Other Professionals that provided support or conducted other PAI activities	ascending orde
Recently Viewed - R0617 ay Area Legal Aid ay Area Legal Aid R0657 R0651			Number of Cases	Total Number of Cases	n of Attorney that Closed	s of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed	Attorneys that provided support or conducted other PAI	Total Number of Law Students/Law Graduates that provided support or conducted other PAI	Total Number of Paralegals/Other Professionals that provided support or conducted other PAI	ascending orde
Recently Viewed         -           R0617         -           ay Area Legal Aid         -           ny Area Legal Aid         -           R0657         -           R0658         -		PAI Category	Number of Cases Referred	Total Number of Cases	n of Attorney that Closed	s of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed	Attorneys that provided support or conducted other PAI	Total Number of Law Students/Law Graduates that provided support or conducted other PAI	Total Number of Paralegals/Other Professionals that provided support or conducted other PAI	ascending orde
Recently Viewed         -           R0617         -           ny Area Legal Ald         -           ny Area Legal Ald         -           R0657         -           R0656         -           R0668         -		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases	n of Attorney that Closed	s of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed	Attorneys that provided support or conducted other PAI	Total Number of Law Students/Law Graduates that provided support or conducted other PAI	Total Number of Paralegals/Other Professionals that provided support or conducted other PAI	Actions
Recently Viewed         -           R0617         ay Area Legal Aid           ay Area Legal Aid         a           ay Area Legal Aid         a           R0651         a           R0655         a           R0653         a           R0653         a           R0673         b           Be visit 13 Jan         b		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	s of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Paralogala/Other Professionals that provided support or conducted other PAI activities	Actions
Irantee Profile Recently Viewed — — — — — — — — — — — — — — — — — — —		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	s of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Paralogala/Other Professionals that provided support or conducted other PAI activities	Actions
Recently Viewed         -           R0617         ay Area Legal Aid           ay Area Legal Aid         a           ay Area Legal Aid         a           R0651         a           R0655         a           R0653         a           R0653         a           R0673         b           Be visit 13 Jan         b		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	s of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Paralogala/Other Professionals that provided support or conducted other PAI activities	Actions

Figure 38: Image of Compensated Section of the PAI Categories Tab

# 2021 GAR Reporting Guidance

For more details on each of these sections, please visit the General Reporting Guidance document.

After users complete all tabs in the **Service Area Forms**, they should save and validate the form.

	*	Opportunities Applicatio	ns Grants	Monitoring	Closeout	🕒 🗩					
Search –		PAI Category	Total Number of Cases Referred	Total Number of Cases Closed	Number of Attorneys that Closed Cases	Total Number of Law Students/Law Graduates that Closed Cases	Total Number of Paralegals/Other Professionals that Closed Cases	Total Number of Attorneys that provided support or conducted other PAI activities	Students/Law Graduates that provided support or conducted other PAI activities	Paralegals/Other Professionals that provided support or conducted other PAI activities	Actions
		Pro Bono: Grantee	3,300	3,000	0	0	0	0		0	0 🥜
Tasks –		Pro Bono: Subgrantee(s)	3,300	3,000	0	0	0	0		0	0 🥜
Tasks —			6,600	6,000	0	0	0	0		0	0
nding Tasks							Total Records:2				
mpleted Tasks											
assign Tasks		▲ Compensated									-
Activities –				_							
anization –		Search		Q							T
antee Profile		Search		Q					* Records	s are sorted by <b>Created Date as</b>	
antee Profile Recently Viewed –		Search		Q	Total						
antee Profile Recently Viewed –		Search	Total	Total	Number	Total Number of Law	Total Number of	Total Number of Attorneys that	* Records	s are sorted by Created Date as Total Number of	
antee Profile Recently Viewed — A0617 Iy Area Legal Aid		PAI Category	Total Number of		Number	of Law Students\Law	Paralegals/Other Professionals	Attorneys that provided support	Total Number of Law Students/Law Graduates that	Total Number of	scending orde
antee Profile Recently Viewed – A0617 Iy Area Legal Aid Iy Area Legal Aid			Number of Cases	Total Number of Cases	r of Attorney that	of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed	Attorneys that provided support or conducted other PAI	Total Number of Law Students/Law Graduates that provided support or conducted other PAI		scending orde
antee Profile  Recently Viewed –  R0617  sy Area Legal Aid sy Area Legal Aid0657			Number of	Total Number of Cases	r of Attorney	of Law Students\Law Graduates	Paralegals/Other Professionals	Attorneys that provided support or conducted	Total Number of Law Students/Law Graduates that provided support or	Total Number of Validate	Forn
antee Profile  Recently Viewed –  k0617  y Area Legal Aid  w Area Legal Aid 0657  k0651			Number of Cases	Total Number of Cases	r of Attorney that Closed	of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed	Attorneys that provided support or conducted other PAI	Total Number of Law Students/Law Graduates that provided support or conducted other PAI	Total Number of	Forn
antee Profile  Recently Viewed 0617  y Area Legal Aid y Area Legal Aid0657065106850688		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases	r of Attorney that Closed	of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed	Attorneys that provided support or conducted other PAI	Total Number of Law Students/Law Graduates that provided support or conducted other PAI	Total Number of Validate	Forn
antee Profile  Recently Viewed – 0617 y Area Legal Aid +0657 +0657065806680663		PAI Category	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Validate Butto	Forn
antee Profile Accently Viewed		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases	r of Attorney that Closed	of Law Students\Law Graduates that Closed	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI	Total Number of Validate	Forn
antee Profile  Recently Viewed – 0617 y Area Legal Aid +0657 +0657065806680663		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Validate Butto	Forn
antee Profile  Recently Viewed		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Validate Butto	Forn
antee Profile  Recently Viewed		PAI Category Compensated: Grantee	Number of Cases Referred	Total Number of Cases Closed	Number of Attorney that Closed Cases	of Law Students\Law Graduates that Closed Cases	Paralegals/Other Professionals that Closed Cases	Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Validate Butto	Fo

Figure 39: Image of the Validate Form Button for the Service Area Level Forms

Users will note that validation errors will appear at the top of the screen.

GRANTEASE	Grants Management	System						As a	a Grantee 🗸 🙆 🗸	LEGAL SERVICES CORPOR
<	Copportunities Appli	cations Grant	s Monitoring	Closeout	• •					
Search -										
earch	Personnel Expense     Non-Personnel Exp									
	LSC Revenue - You	must provide a v	alue for each rev	venue line. Ente	er Zero if there were no	o revenues for a given c are no revenues for a gi				
" ×	Client Service Incom	ne - Please provi	de Amount for all	rows.	. Citter Zero il there we	ore no revenues for a gr	ven category.			
Tasks -	Staff Open Cases -     PAI Open Cases -	lease provide PA	Open Cases for	r all rows.						
/ Tasks -	Compensated - Ple     Gender - Please pr									
ending Tasks	Veteran Status - Ple     Ethnicity - Please p	ase provide Num	ber of Household	ds for all rows.						
Completed Tasks	Language - Please									
Reassign Tasks	GAR									
Activities -	Service Area Level Fo	rms							Validate Form	
ganization -								S	ervice Area Level Forms	
Recently Viewed -	Service Area				Type			Reporting Year		
R0617	CA-28				General			2021		
ay Area Legal Aid										
ay Area Legal Aid	Expenses Rever	nue Staff O	pen Cases	PAI Open C	ases Demogra	phics PAI Catego	ories			
R0657										
R0651	Saved Successfu	lly!								×
R0668										
R0663 B0673	A Pro Bono									
ite visit 13 Jan	Search		Q							T
ite visit 13 Jan								* Recon	ds are sorted by Created D.	ate ascending order
Technical Support -	-			Total						
Contact Us		Total Number	Total Number	Number	Total Number of Law	Total Number of Paralegals/Other	Total Number of Attorneys that	Total Number of Law Students/Law	Total Number of Paralegals/Other	
	PAI Category	of	of	Attorneys	Students/Law	Professionals	provided support	Graduates that provided support or	Professionals that provided support or	
		Cacac	Canac	that	Graduates that	that Clocod	botophono	provided support of	provided support of	

Figure 40: Image of the Validation Error Messages for the Service Area Level Forms

Users should copy and paste all validation errors into an Excel spreadsheet and rectify each error.

**NOTE:** There may be more validation errors than can appear on the screen. We recommend cutting and pasting the errors into a spreadsheet, and as they are rectified, they can be crossed off. If after validating again, more errors appear, repeat this process.

# Submitting the GAR

Once users complete all tabs of the GAR, along with the Self-Inspection and OCE Ongoing Compliance (detailed in the next section of the manual), they should submit their GAR. To do so, users should click on the **Back button** to go back to the main screen.

GRANTEASE	Grants Management Sy	stem						**	As a Grantee 🖌 🙆 🗸		America's Partner for Equal Justice avides componation
<	Opportunities Application	ons Grants	Monitoring	Closeout	• •						
Q Search –	GAR Service Area Level Form	S							Validate Fo Service Area Level Forms	rm Ed	Back
Al	Service Area CA-28				Type General			Reporting Year 2021		$  \uparrow$	
Tasks – My Tasks – Pending Tasks	Expenses Revenue	Staff Ope	en Cases	PAI Open C	ases Demogra	phics PAI Catego	ories		Back	7	
Completed Tasks Reassign Tasks	▲ Pro Bono		Q						Button		=
🛤 Activities –	Jobaron		4						ecords are sorted by created	Date ascei	
Organization – Grantee Profile Recently Viewed – PR0617 Bay Area Legal Aid Bay Area Legal Aid	PAI Category	Total Number of Cases Referred	Total Number of Cases Closed	Total Number of Attorneys that Closed Cases	Total Number of Law Students/Law Graduates that Closed Cases	Total Number of Paralegals/Other Professionals that Closed Cases	Total Number of Attorneys that provided support or conducted other PAI activities	Total Number of Law Students/Law Graduates that provided support or conducted other PAI activities	Total Number of Paralegals/Other Professionals that provided support of	or	Actions
PR0657	Pro Bono: Grantee	3,300	3,000	c		0 0		0	0	0	1
PR0651	Pro Bono: Subgrantee(s)	3,300	3,000	c	1	0 0	1	D	0	0	1
PR0668 PR0663 PR0673		6,600	6,000	c		0 0 Total Records:2			0	0	
Site visit 13 Jan Site visit 13 Jan	▲ Compensated										=
Contact Us	Search		Q					* Re	ecords are sorted by Created	Date ascer	nding order
	GovGrants			Total		Terms of Use	I Privacy Policy				

Figure 41: Image of Selecting the Back Button for the GAR Form(s)

This will take users to the initial screen for the **Grantee Activity Report**. Users will want to ensure that <u>ALL</u> forms have been validated prior to this step (*see checks next to each form to check validation status*).

To ensure all of the other forms have been completed in full, users should select the **Validate GAR Button**.

GRANTEASE	Grants Management System			As a	Grantoe      Grant
<	A Opportunities Applications G	ants Monitoring Closeout			
Q Search -	Grantee Activity Reports				Edit Subm Validate GAR
Search Q	EGMS ID	Status	Submittee	I On	
All 🗸	PR-GAR-2214	Created			
Tasks –	- Page instruction text				
My Tasks -					
Pending Tasks	Created		Submitted to Granto		Approved
Completed Tasks Reassign Tasks	Overview OGAR - Staff	Case Services	I Case Services 🗗 Other GAR Forms	👡 Validate GAF	{
Activities -				Button	
Organization –	<ul> <li>Grantee Level Forms</li> </ul>				=
Grantee Profile GAR Report				(Offices & staming, Other Services, Additional Case Inform Form, please see the Self-Inspection & Ongoing Complian	
Recently Viewed -	Please click on the green eye icon in	a row to open each set of forms.			
PR-GAR-2214	Search	Q			
2022 PBIF Transformation	Showing 1 to 3 of 3 records				
2022 PBIF Transformation Volunteer Lawyers Project	Form Name	Form Validated?	Last Modified By ID	Last Modified Date	Actions
Volunteer Lawyers Project	Grantee Level Forms	×	Amy Anthony	01/10/2022 6:10 PM	۲
PR-GAR-2214	Self-Inspection Certification and Summary Form	×	Amy Anthony	01/11/2022 2:34 PM	۲
Volunteer Lawyers Project Volunteer Lawyers Project	Ongoing Compliance Oversight			11/15/2021 10:00 AM	
2022 PBIF Transformation	Form	×	manu admin	11/15/2021 10:00 AM	۲
2022 PBIF Project			Total Records, 3		
Technical Support –	▲ Service Area Form(s)				=
Contact Us				ographics, and Categories of Private Attorney Involvement I21 GAR Guidance Document. For technical guidance, ple	

Figure 42: Image of Selecting the Validate GAR Button for the GAR Report

Users can then select the Submit button.

GRANTEASE	Grants Management System	n			**	As a Grantee 🗸 🙆 🗸	LSC America's Partner for Equal Justice
<	Opportunities Applications	Grants Monitoring C	Closeout				
Q Search -	Grantee Activity Reports					Edit Subr	nit Validate GAR 🗮
Search Q	EGMS ID PR-GAR-2214		tatus reated	Submit	ted On		
Tasks -	- Page instruction text						
My Tasks – Pending Tasks	Cre	sted		Submitted to Grav	Submit Button	Approved	
Completed Tasks Reassign Tasks	Overview OGAR - S	taff Case Services	GAR - PAI Case Services	Dther GAR Forms	Collab		
Activities -	▲ Grantee Level Forms			-	•		=
Grantee Profile GAR Report Recently Viewed –		on the Self-Inspection Cert	tification and Summary Form or th		ns (Offices & Staffing, Other Services, Additional Case I ht Form, please see the Self-Inspection & Ongoing Com		
PR-GAR-2214	Search	Q					T
2022 PBIF Transformation	Showing 1 to 3 of 3 records						
2022 PBIF Transformation Volunteer Lawyers Project	Form Name	Form Validated?	Last N	Addified By ID	Last Modified Date	Actions	
Volunteer Lawyers Project	Grantee Level Forms	×	Amy A	nthony	01/10/2022 6:10 PM	۲	
PR-GAR-2214 Volunteer Lawyers Project	Self-Inspection Certification an Summary Form	×	Amy A	nthony	01/11/2022 2:34 PM	۲	
Volunteer Lawyers Project	Ongoing Compliance Oversigh Form	×	manu	admin	11/15/2021 10:00 AM	۲	
2022 PBIF Transformation 2022 PBIF Project	1			Total Records: 3			
Technical Support –	Service Area Form(s)						=
Contact Us	Service Area level forms request	service area-level data. The	se include Expenses. Revenue	Case Services, Open Cases, De	mographics, and Categories of Private Attorney Involve	ment (PAI). Instructions are in	cluded with each form

Figure 43: Image of Selecting the Submit Button on the Main Grantee Activity Reports Screen

Users may see a list of validation errors appear. As mentioned previously, this may not be a comprehensive list; thus, users are encouraged to keep track of all validation errors by cutting and pasting them into a spreadsheet, rectifying each error one-by-one, and crossing them off of the list.

GRANTEASE	Grants Management System			**	As a Grantee - O - LSC America's Parts
<	Opportunities Applications Gr	ants Monitoring Closeout			
Q Search -					
Search Q	<ul> <li>Please update all the mandatory</li> </ul>	fields on Grantee Profile - Overview			Compliance Oversight Form ; Service Area Level Forms X me ; Test staff upload 1 Staff Name 1 ; Test staff upload
All 🗸		To olari Narite oʻ, ina, odarina Pelilor	r, yeney conter, rost stan opticat cam ranter		
	Grantee Activity Reports				Edit Submit Validate GAR
📑 Tasks –	EGMS ID	Status	Subm	litted On	
My Tasks - Pending Tasks	PR-GAR-2214	Created			
Completed Tasks					
Reassign Tasks	- Page instruction text				
🛏 Activities –	-		0		0
Organization –	Created		Submitted to Gr	antor	Approved
Grantee Profile		•	-		
GAR Report	Overview OGAR - Staff	Case Services (SAR - P	Al Case Services Other GAR Forms	Collab	
Recently Viewed –	▲ Grantee Level Forms			_	=
PR-GAR-2214		ender beiden auf eine der eine		rms (Offices & Staffing, Other Services, Additional Ca	
2022 PBIF Transformation					Compliance Reports Submission Guidance Document.
2022 PBIF Transformation	Please click on the green eye icon in	a row to open each set of forms			
Volunteer Lawyers Project Volunteer Lawyers Project					
PR-GAR-2214	Search	Q			T
Volunteer Lawyers Project	Showing 1 to 3 of 3 records				
Volunteer Lawyers Project	Form Name	Form Validated?	Last Modified By ID	Last Modified Date	Actions
2022 PBIF Transformation	Grantee Level Forms	×	Amy Anthony	01/10/2022 6:10 PM	۲
2022 PBIF Project	Self-Inspection Certification and	×	Amy Anthony	01/11/2022 2:34 PM	۲
Technical Support –	Summary Form				
Contact Us	Ongoing Compliance Oversight Form	×	manu admin	11/15/2021 10:00 AM	۲
			Total Records: 3		
	▲ Service Area Form(s)				=

Figure 44: Image of GAR Validation Error Messages after Selecting the Submit Button

GRANTEASE	Grants Management System	1				K As a Grantee 🗸 🔼	LEGAL SERVICES CORPORATION
<	Opportunities Applications	Grants Monitoring Close	out	l			
Q Search -	Grantee Activity Reports					Edil Sub	omit Validate GAR 🗮
Search Q	EGMS ID PR-GAR-2214	Status Create	d	Submitt	led On		
Tasks –	Page instruction text						
My Tasks – Pending Tasks	Crea	ted		Submitted to Gran	Submit But	ton O Approved	
Completed Tasks Reassign Tasks	Overview OGAR - S	taff Case Services 🔹 G	AR - PAI Case Services	Dther GAR Forms	🎭 Collab		
Activities – Organization –	A Grantee Level Forms				-		=
Grantee Profile GAR Report					ns (Offices & Staffing, Other Services, Addit nt Form, please see the Self-Inspection & O		
Recently Viewed -	Please click on the green eye ico	n in a row to open each set of for	ms.				
PR-GAR-2214	Search	Q					T
2022 PBIF Transformation	Showing 1 to 3 of 3 records						1
2022 PBIF Transformation Volunteer Lawyers Project	Form Name	Form Validated?	Last Mor	dified By ID	Last Modified Date	Actions	
Volunteer Lawyers Project	Grantee Level Forms	×	Amy Anth	iony	01/10/2022 6:10 PM	۲	
PR-GAR-2214 Volunteer Lawyers Project	Self-Inspection Certification and Summary Form	×	Amy Anth	iony	01/11/2022 2:34 PM	۲	
Volunteer Lawyers Project 2022 PBIF Transformation	Ongoing Compliance Oversight Form	×	manu ad	min	11/15/2021 10:00 AM	۲	
2022 PBIF Transformation 2022 PBIF Project				Total Records: 3			

Once the validation correction process is complete, users can resubmit their GAR.

Figure 45: Image of Re-selecting the Submit Button after Rectifying All Validation Errors

If more errors appear, users should continue the rectification and corrective process.

When users rectify all errors, they should select the **Submit button** and see that the report status for the GAR has moved from "Created" to "Submitted for Approval."

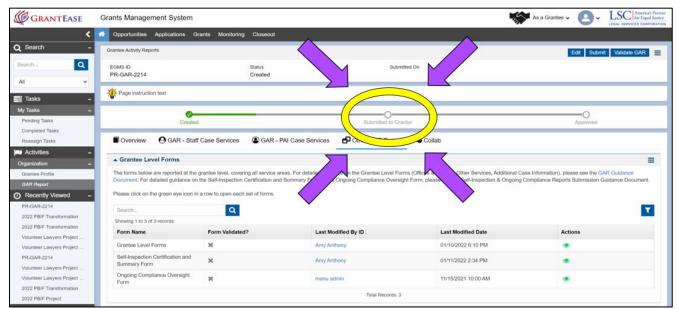


Figure 46: Image of the Status Bar Change that Should Appear after Submission of the GAR Reports

Appendices 1. GAR Validation Errors

**Error Codes and Corrections** 

Action	Grantee Level/ Service Area form	GAR Form	GAR / Grantee Profile Section	Question / Field	Validation	Additional Notes
Validate Form	Grantee Level	Grantee Level Forms	Additional Case Information	Not Reported to LSC (Number of	Value provided should not be greater than	
				non-LSC funded Cases not reported to LSC).*		
Validate Form					Validations for required responses/fields.	
Save or File Upload					prevent negative numbers.	Exception for Expenses and Revenue forms under service area forms.
GAR Submission			Grantee Branch Office	Office type	Only one 'active' office needs to be identified as a main office on the grantee profile.	

Action	Grantee Level/ Service Area form	GAR Form	GAR / Grantee Profile Section	Question / Field	Validation	Additional Notes
GAR			Grantee Staff	Service	At least once	Check is performed
Submission			Contacts	Area	service area must	on staff contacts
				allocation	be associated for	who are current staff
					each staff contact.	and also on the staff
						contacts who were
						active for some time
						during the reporting
						year.
GAR			Grantee Staff	Service	The sum of	Check is performed
Submission			Contacts	Area	service area	on staff contacts
				allocation	percentage must	who are current staff
					be 100% for each	and also on the staff
					staff contact.	contacts who were
						active for some time
						during the reporting
						year.

CAD	<u>с</u> .	D 1.	C 1	T1 C	
GAR	Service	Demographics	Gender	The sum of	
Submission	Area			Gender and	
				Groups in	
				Demographics	
				form must be	
				equal to the sum	
				of Staff and PAI	
				case closures	
				entered on the	
				Case Services	
				Form.	
GAR	Service	Demographics	Veteran	The sum of	
Submission	Area	8	Status	Veteran and	
Suomission	7 Hou		Statas	Groups in	
				Demographics	
				form must be	
				equal to the sum	
				of Staff and PAI	
				case closures	
				entered on the	
				Case Services	
				Form.	
GAR	Service	Demographics	Total Clients	The sum of	
Submission	Area	Demographies	Entered for	Age/Ethnicity and	
Suomission	7 HCd		Age &	Groups in	
			Ethnicity	Demographics	
			Etimetry	0.	
				form must be	
				equal to the sum	
				of Staff and PAI	
				case closures	
				entered on the	
				Case Services	
				Form.	
GAR	Service	Demographics	Language	The sum of	
Submission	Area	01	00	Language and	
~				Groups in	
				Demographics	
				form must be	
				equal to the sum	
				of Staff and PAI	
				case closures	
				entered on the	
				Case Services	
				Form.	
GAR	Service	Categories of	Pro Bono	Enter either value	
Submission	Area	PAI - Basic		or zero in each	
		Field Only		cell	
		11010 Omj			

GAR Submission	Service Area	Categories of PAI - Basic	Compensated		Enter either value or zero in each	
GAR	Service	Field Only Categories of	Totals		cell Total of all PAI	
Submission	Area	PAI - Basic Field Only	Totals		Cases Closed should equal the Total number of PAI case closures recorded in the Case Services form.	
GAR		Staff and PAI	Totals		Sum of Staff and	
Submission	screen	Case Services			PAI Cases Services must not be grater that 100,000.	
Action	Grantee Level/ Service Area form		Staff Contacts	All required fields	All the required fields on each of the staff contacts must be provided to proceed with GAR submission.	Required fields on staff contacts: First Name Last Name Email Phone Key Staff Designation Role Birth Year Gender Race / Ethnicity Language Attorney Annual Salary Hours Per Week Annual Other Compensation Start Date Years Experience - Grantee Years Experience - Job Years Experience - Professional Staff Contact Status

# 2. Self-Inspection and Ongoing Compliance Oversight Validation Errors Error Codes and Corrections

#### Self-Inspection Certification and Summary Form

Self-Inspection section:

• The number of cases reviewed in the representative sample of the total number of cases being reported to LSC must be between 75 and 300.

- During the editing of this section, respondents will encounter the above message if the response to question one (1) is either 74 or below or 301 or above.
- To resolve, enter a number either equal to or between 75 and 300.

• The number of cases sampled in which one or more errors were noted must be smaller than the number entered in item #1 and may be 0

X

x

X

• During the editing of this section, respondents will encounter the above message if the number entered in response to question two (2) is larger than the number entered in response to question one.

• The Self-Inspection Summary section indicates that at least one case was found to have an error. Please enter a number greater than zero in response to question 2 in the Self-Inspection section.

• During the validation of the Self-Inspection Certification and Summary Form, respondents will encounter the above message if the number entered in response to question two (2) is zero (0) yet a number/s were entered into at least one row of the Number of Cases with Error column of the Self-Inspection Summary table.

Self-Inspection Summary section:

#### 8 Required Field Missing

- During the editing of this table, respondents will encounter the above message if it is missing responses.
- To resolve, locate the table cell missing a response, fill in the response, and press the **Save button**.
  - **NOTE** that each row must have responses in both the <u>Number of Cases with</u> <u>Error</u> and <u>Corrective Action (Yes/No)</u> columns.
  - If there are no cases to report for the row, enter a zero (0) in the <u>Number of Cases</u> <u>with Error</u> column; if no corrective actions were taken, select "No" from the dropdown.

Self-Inspection Summary - Please provide responses for all rows.

• During form validation, respondents will encounter the above message if the Self-Inspection Summary table is missing data or responses.

X

• To resolve, click on the Edit button in the top right and add the missing data to the table.

S Number of cases with each individual type of error should not be larger than the total number of cases sampled in which one or more errors were noted (as reported above), or should not be negative.

During the editing of this table, respondents will encounter the above message if a response in the column <u>Number of Cases with Errors</u> includes a negative number or a number that is more than the response to question two in the Self-Inspection section of the form.

#### Ongoing Compliance Oversight Form:

- Corrective Actions Taken is required to save, if Errors Identified is yes.
- During the editing of individual rows, respondents will encounter the above message if "Yes" is selected in the <u>Errors Identified</u> column and no response was entered or chosen in the <u>Corrective Actions Taken</u> column.
- To resolve, open the record and select the appropriate response/s from the options provided under the <u>Corrective Actions Taken</u> header. Alternatively, if no errors were identified, respondent should then open the record using the Edit icon and select "No" from the dropdown.
- If Other is selected, please provide a brief narrative in the provided box.
- During the editing of individual rows, respondents will encounter the above message if "Other" is selected in the <u>Corrective Actions Taken</u> column and no text was entered into the "If you have selected 'Other' for Corrective Actions Taken, please elaborate:" box.
  - To resolve, open the record and either enter text into the "If you have selected 'Other'..." box or uncheck the "Other" box under <u>Corrective Actions</u> <u>Taken</u>.
- Ongoing Compliance Oversight Form Summary Please provide responses for all rows.
  - During form validation, respondents will encounter the above message if responses have not been entered into at least the <u>Errors Identified</u> column.
  - To resolve, respondents should locate the row/s with missing responses, click on the **Edit icon**, and provide a response from the options provided.