1/24/22

GrantEase

2021 GAR User Manual

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 2021 GAR Guidance Document 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 Grantee Activity Reports 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.

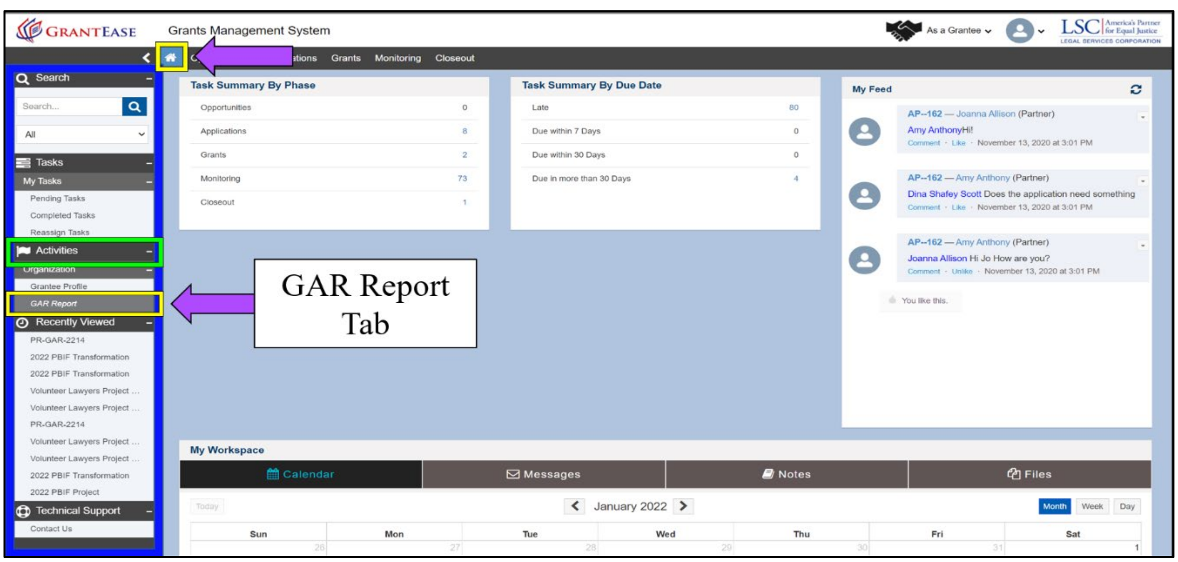


Figure 1: Image of the Home Screen and the Grantee Profile and GAR Report tabs in the Side Bar

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

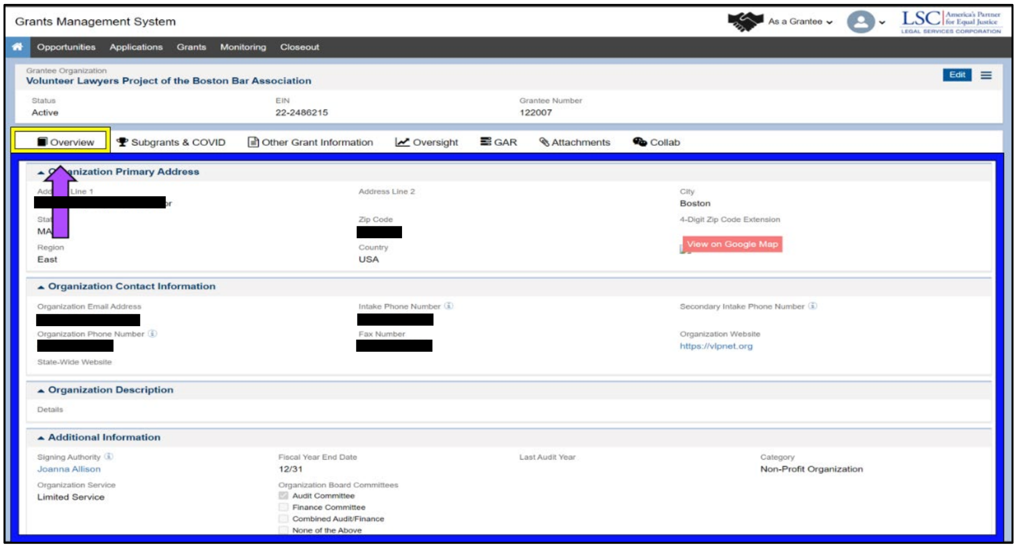


Figure 2: Image of the Overview tab on the Grantee Profile

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 Micro-module titled **Grantee Profile**).

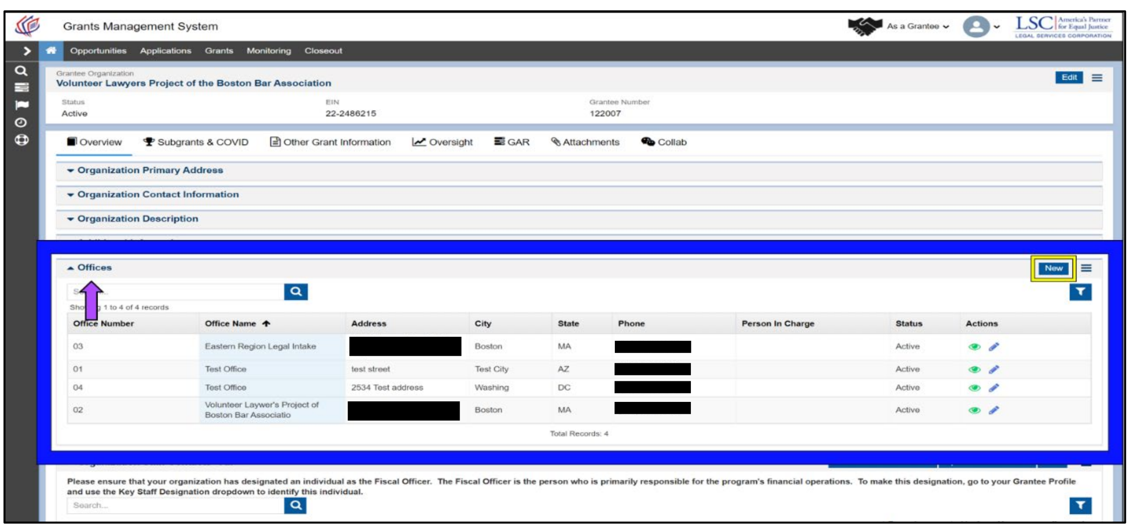


Figure 3: Image of the Offices Section of the Grantee Profile and the New Button

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

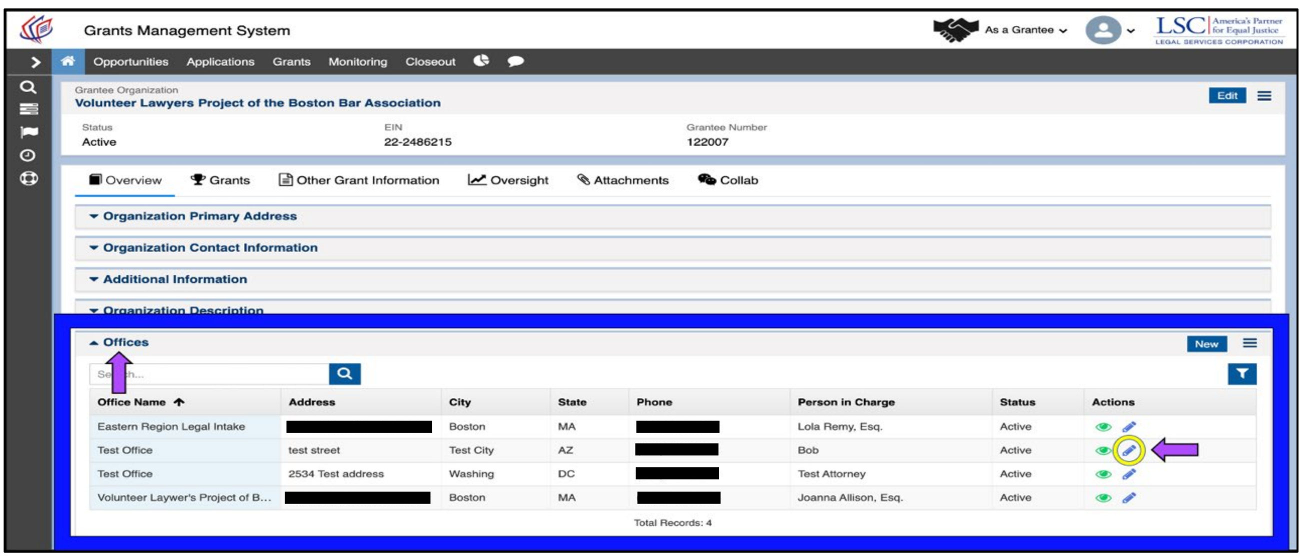


Figure 4: Image of the Edit Icon on the Offices Section of the Grantee Profile

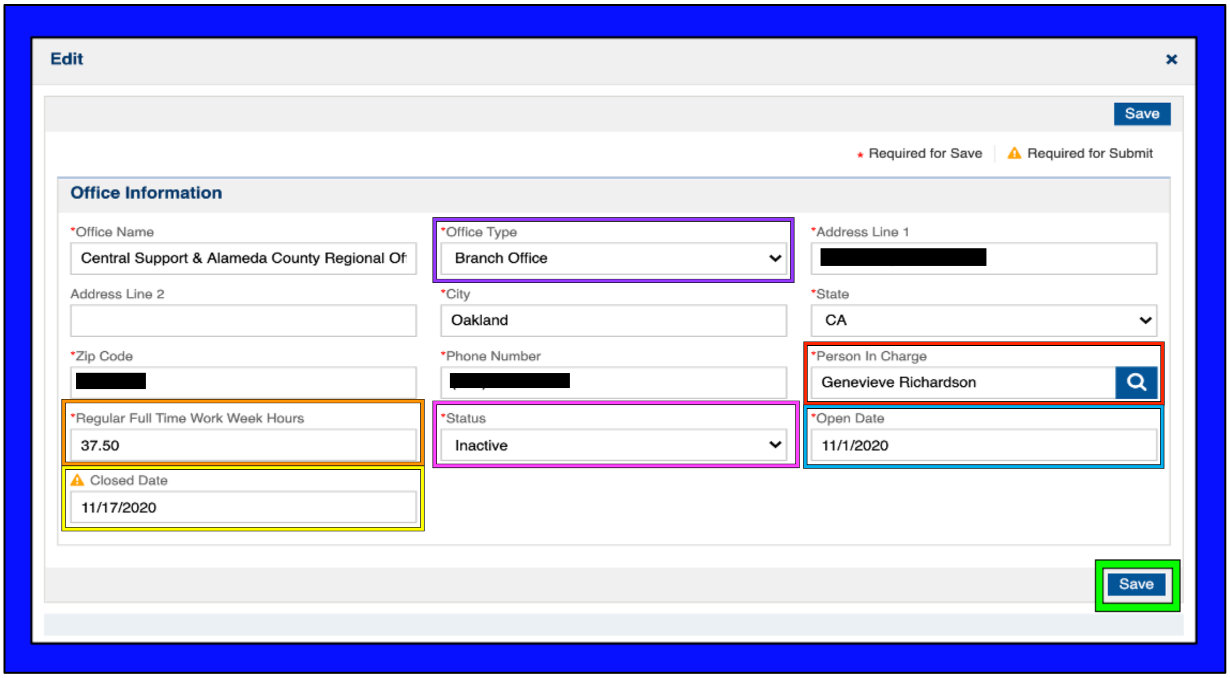


Figure 5: Image of the New Office Location Pop-up Screen

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

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.

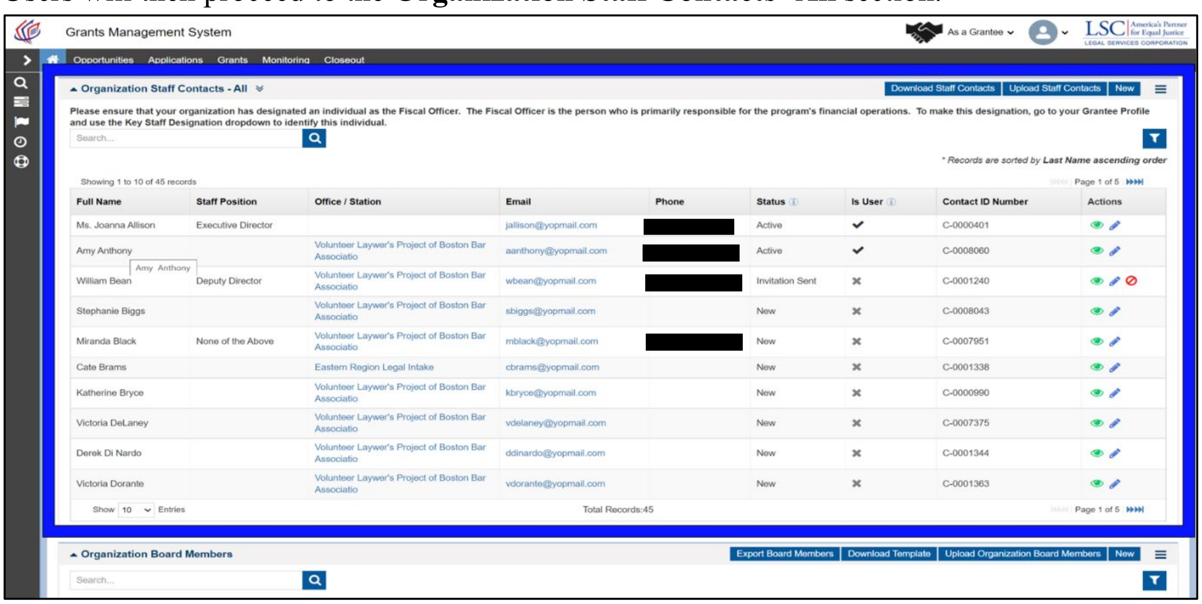


Figure 6: Image of the Organization Staff Contacts Section of the Grantee Profile

To provide the most detailed and up-to-date information, begin by making sure that **ALL** 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.

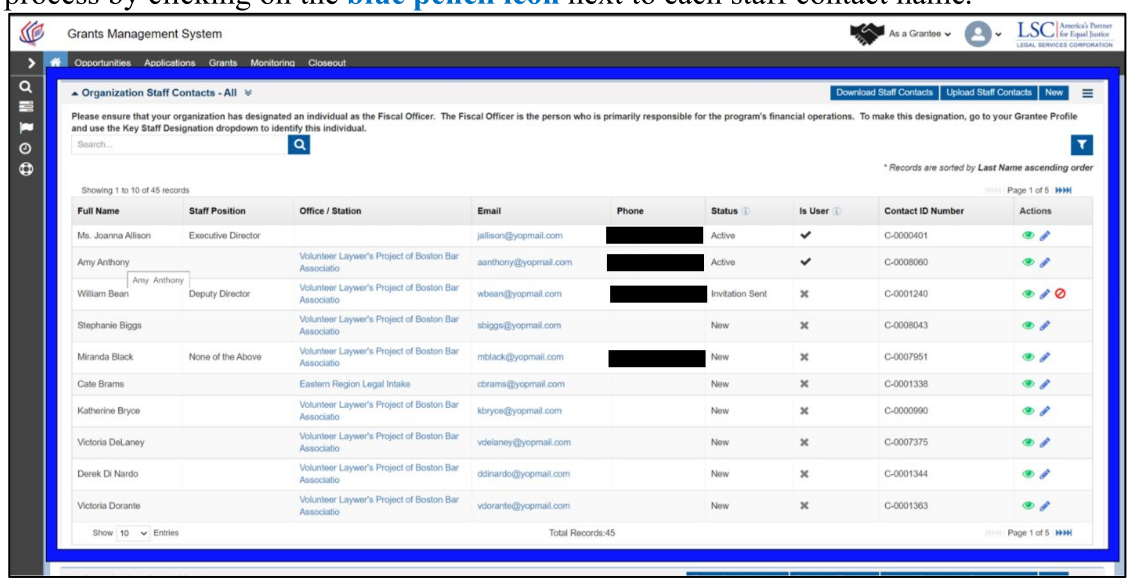


Figure 7: Image of the Edit Icon on the Organization Staff Contacts Section of the Grantee Profile

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*.)

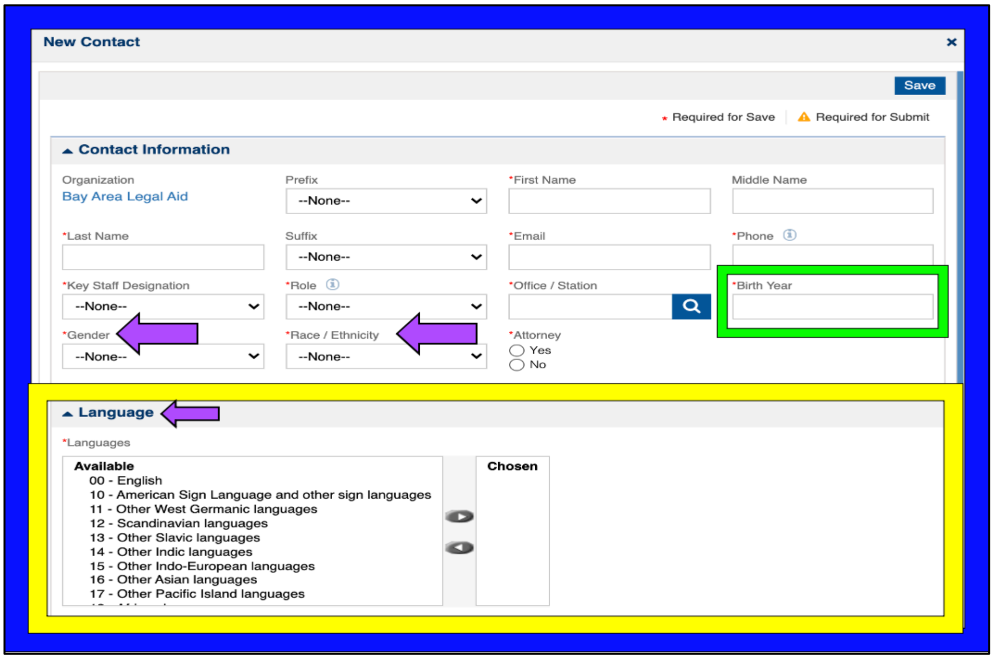


Figure 8: Image of the New/Edit Organization Staff Contacts Pop-up Screen

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 *asterisk*), 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 last date of employment in the field labeled "End Date" (*see* 2021 GAR Guidance Document *for relevant definitions)*.

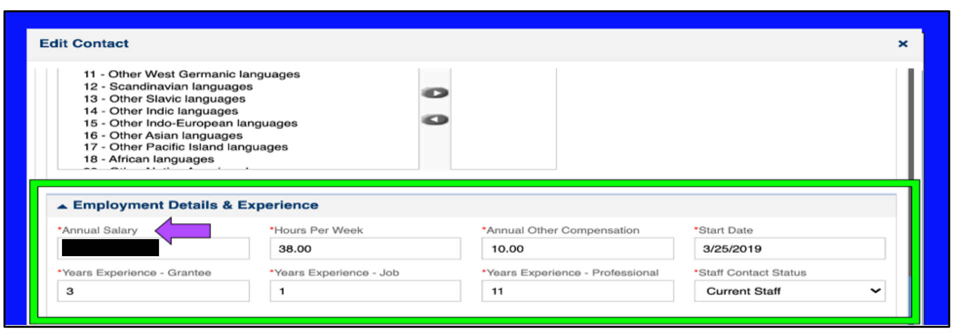


Figure 9: Image of the Employment Details & Experience Section of the Staff Contacts Pop-up Screen

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.

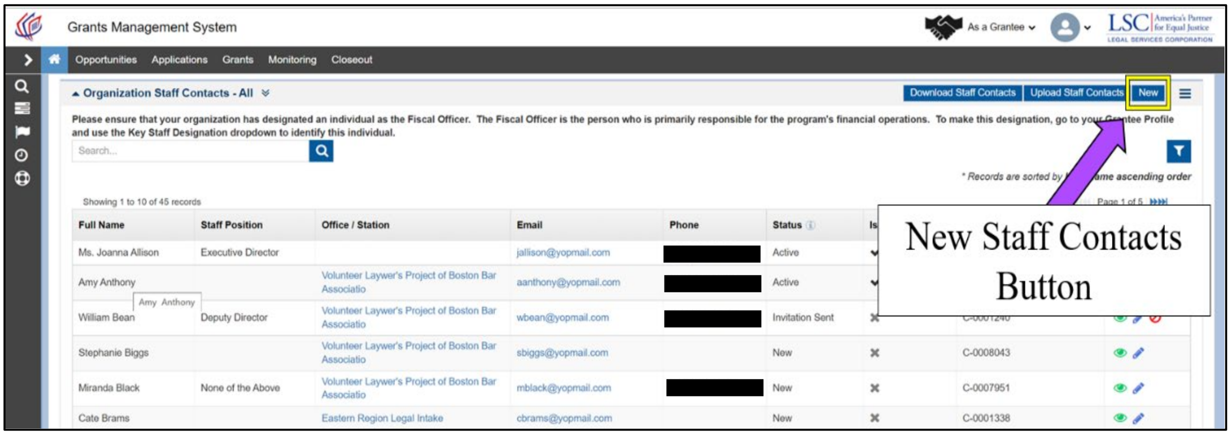


Figure 10: Image of the New Button on the Organization Staff Contacts Section of the Grantee Profile

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**.*

Please do NOT use the upload function to add new staff to *GrantEase*. 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 2021 GAR Guidance Document *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.

STEP 3: After receiving a warning that the file format and extension do not match, click "Yes" to open the file.
STEP 4: Enable editing (if that message appears) to begin entering data.

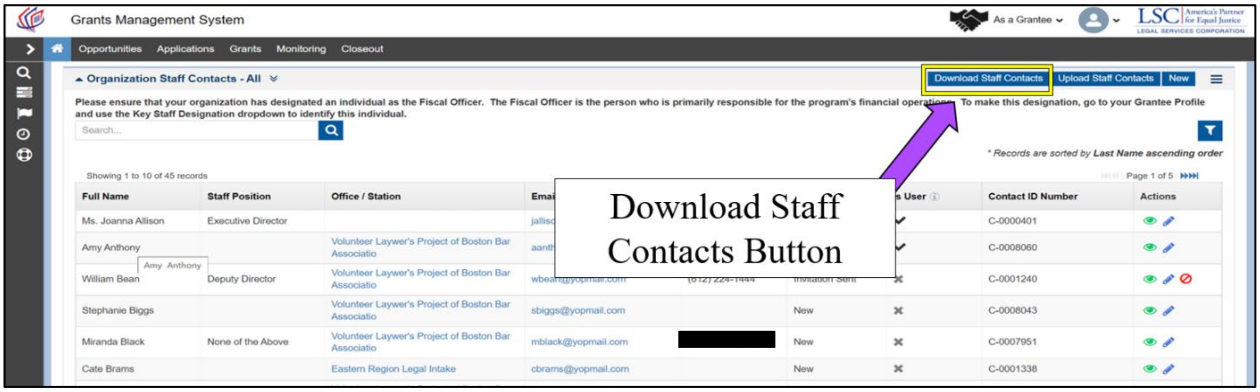


Figure 11: Image of the Download Staff Contacts Button on Staff Contacts Section of the Grantee Profile

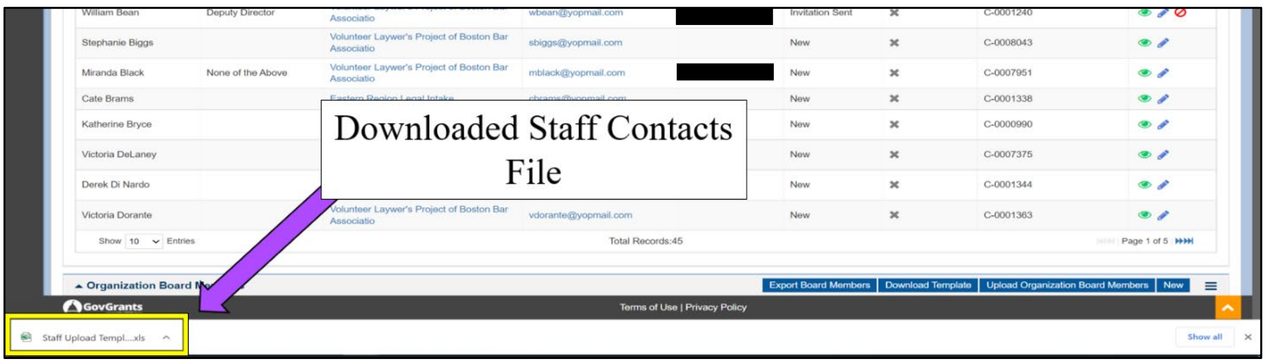


Figure 12: Image of the Downloaded Staff Contacts File

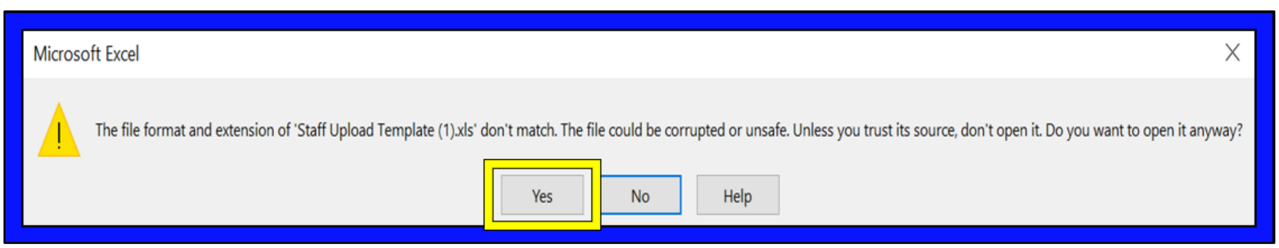


Figure 13: Image of the File Extension Warning from Opening the Excel File

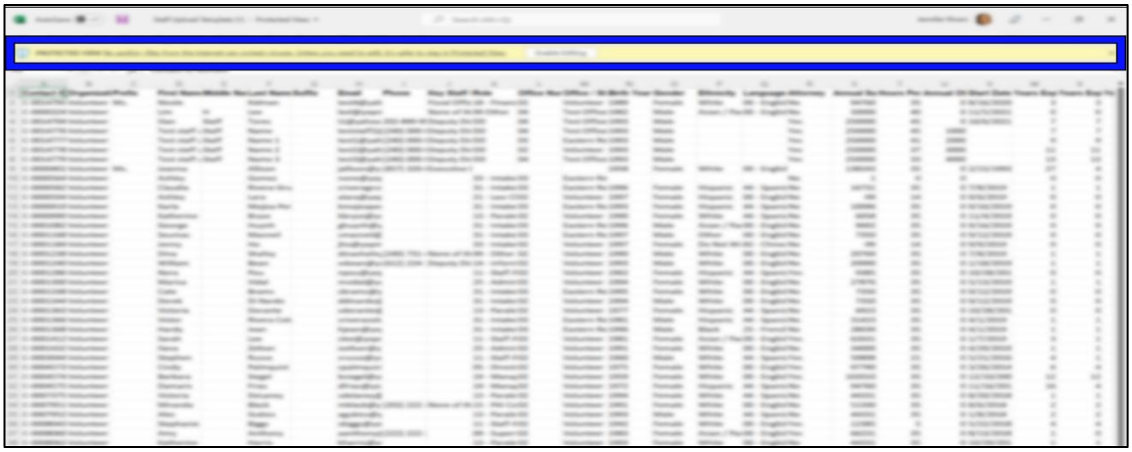


Figure 14: Image of the Opened Organization Staff Contacts File and the Enable Editing Banner

Users can continue entering data for **EACH** Staff Contact on the **same** 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 Fields for Staff Contacts Upload 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 **ALL** 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 formatting before uploading.

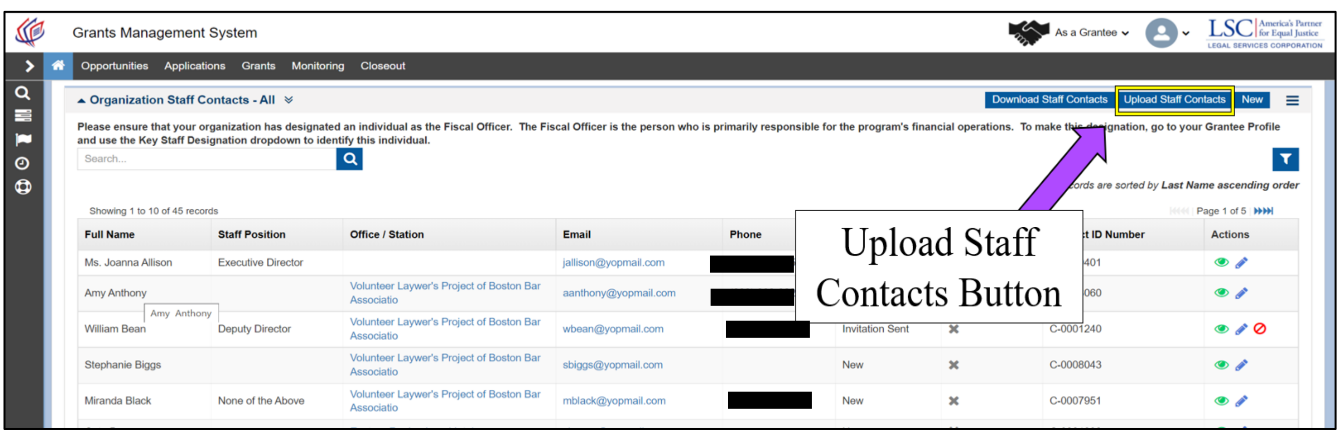


Figure 15: Image of Upload Staff Contacts Button in Staff Contacts Section of Grantee Profile

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

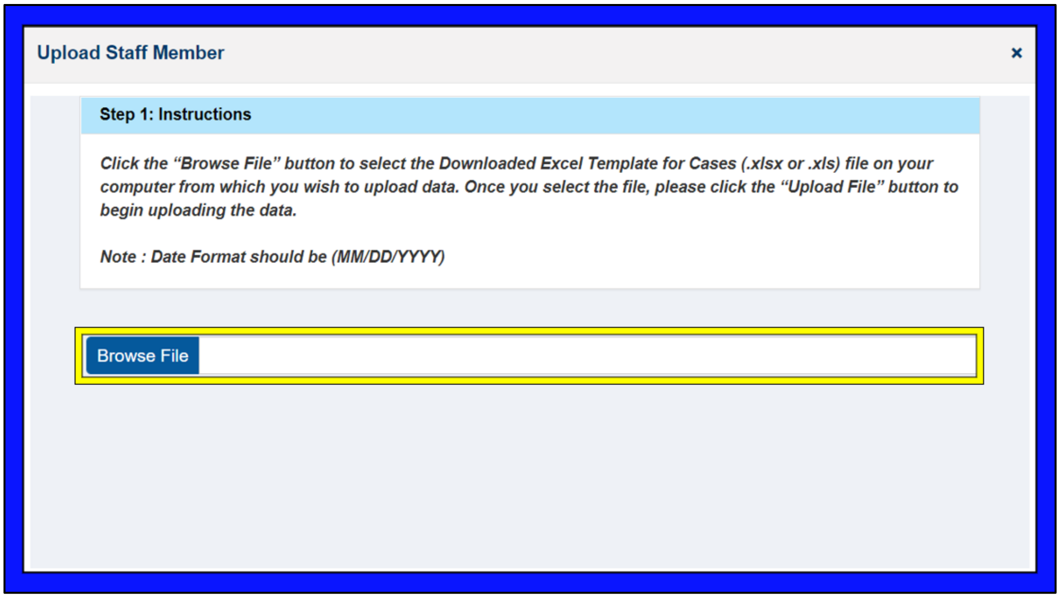


Figure 16: Image of the Organization Staff Contacts Upload Window and Locating the File

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***.

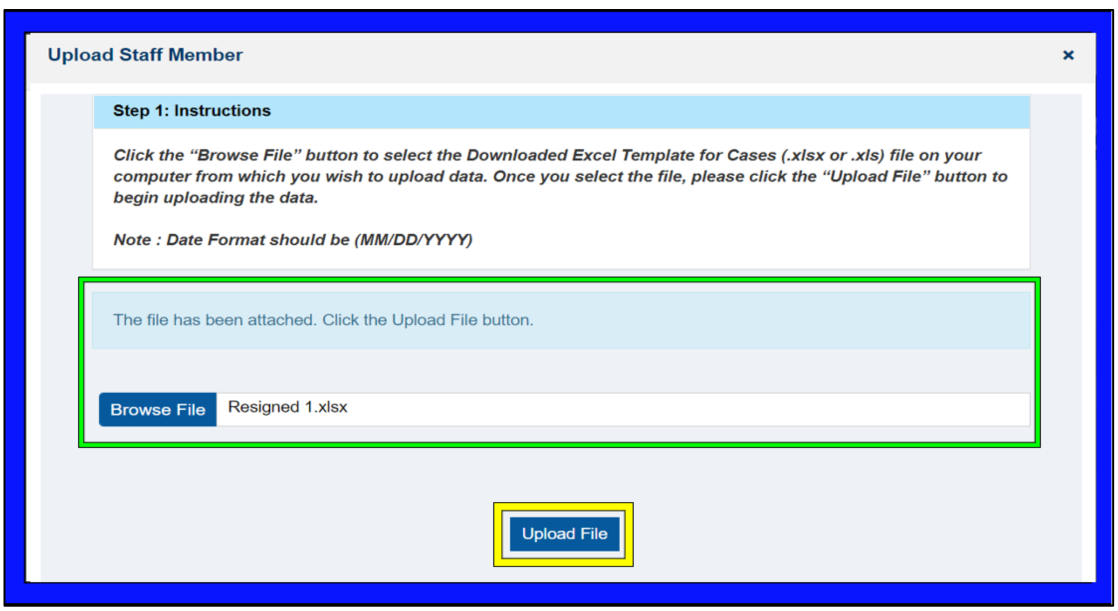


Figure 17: Image of a Successfully Attached Organization Staff Contacts File Ready for Uploading

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.

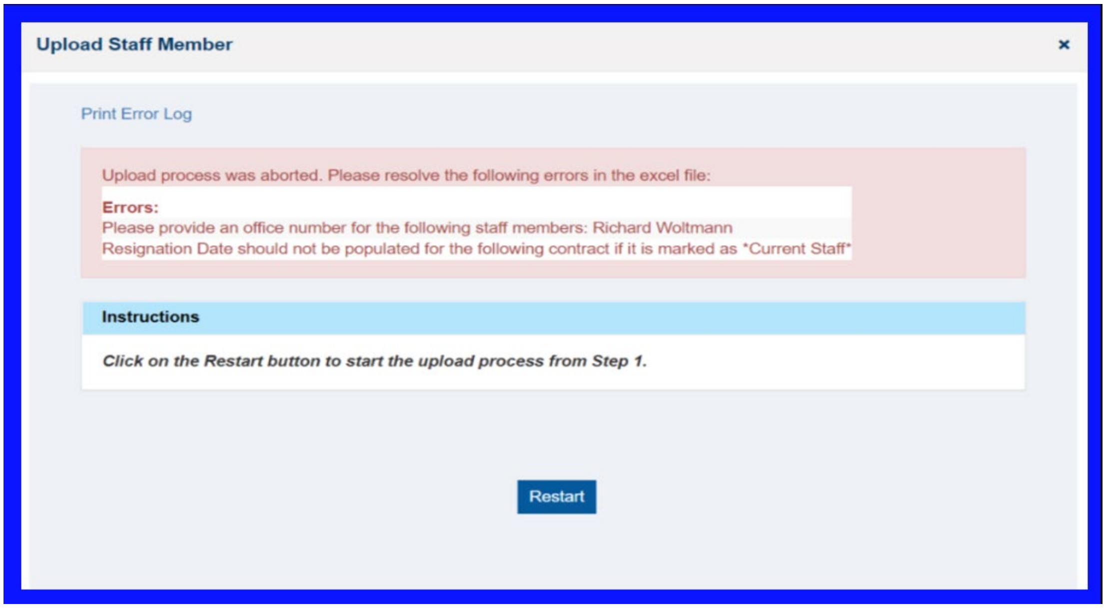


Figure 18: Image of Validation Error Messages for the Excel File and the Print Error Log Link

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.

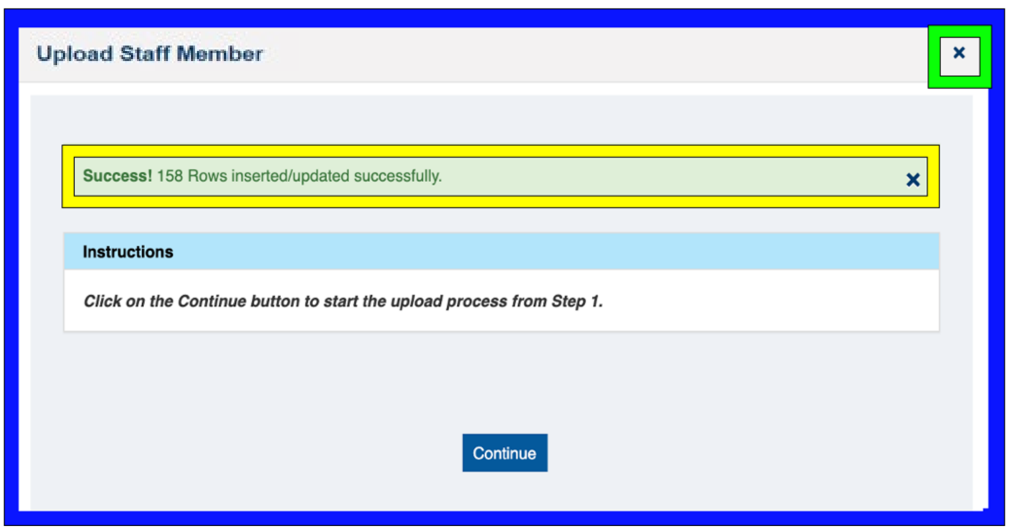


Figure 19: Image of the Successful File Upload Message

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 2021 GAR Guidance Document.

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.

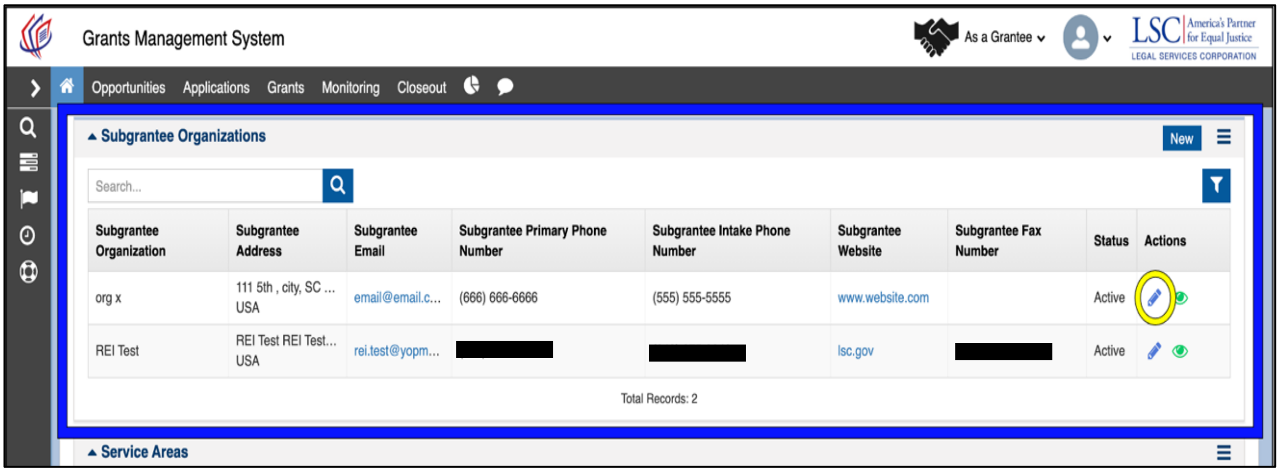


Figure 20: Image of the Subgrantee Organizations Section of the Grantee Profile and the Edit Icon

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

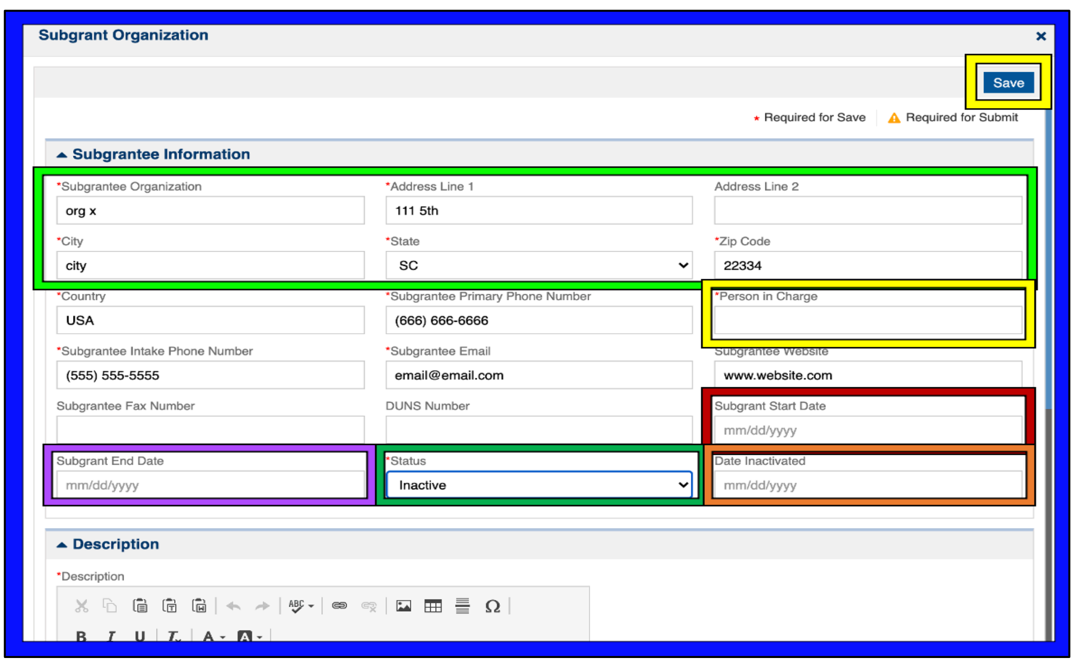


Figure 21: Image of the Edit Subgrantee Organization Pop-up Screen

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.

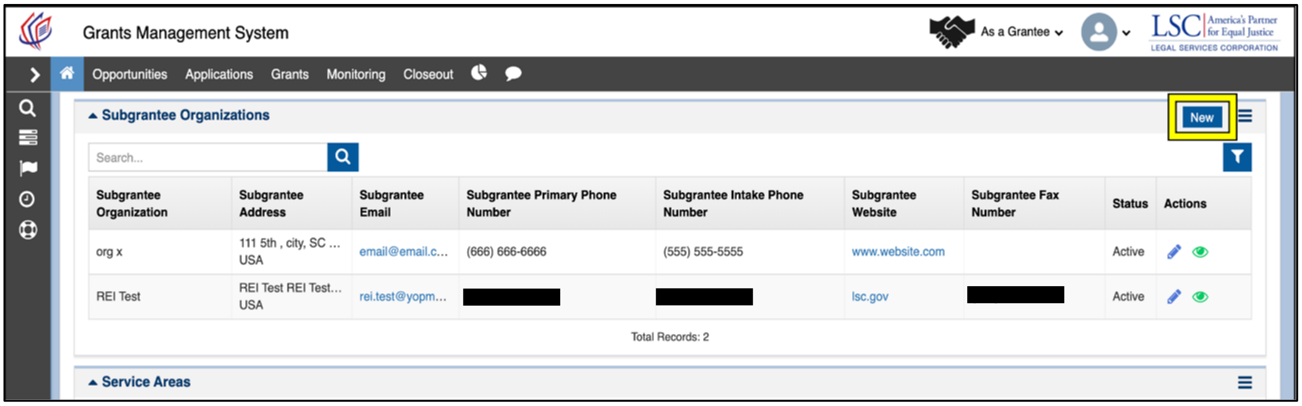


Figure 22: Image of the New Button on the Subgrantee Organizations Section of the Grantee Profile

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.

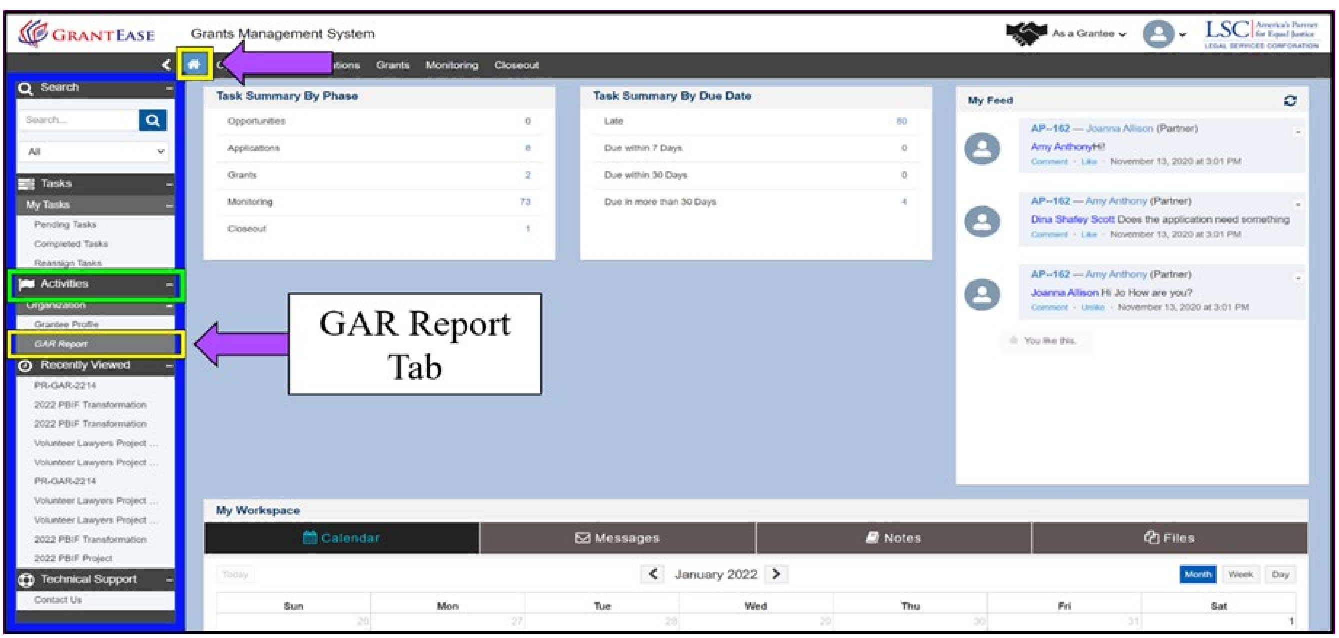


Figure 1: Image of the Home Screen and the Grantee Profile and GAR Report Tabs

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.

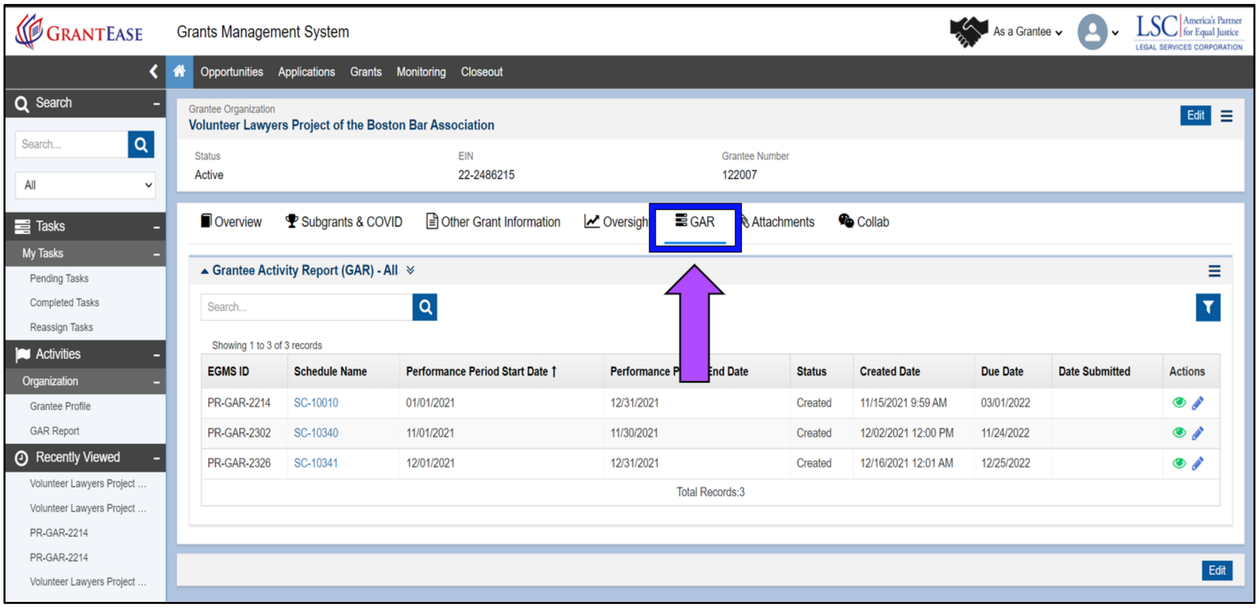


Figure 2: Image of the GAR Tab on the Grantee Profile page

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.

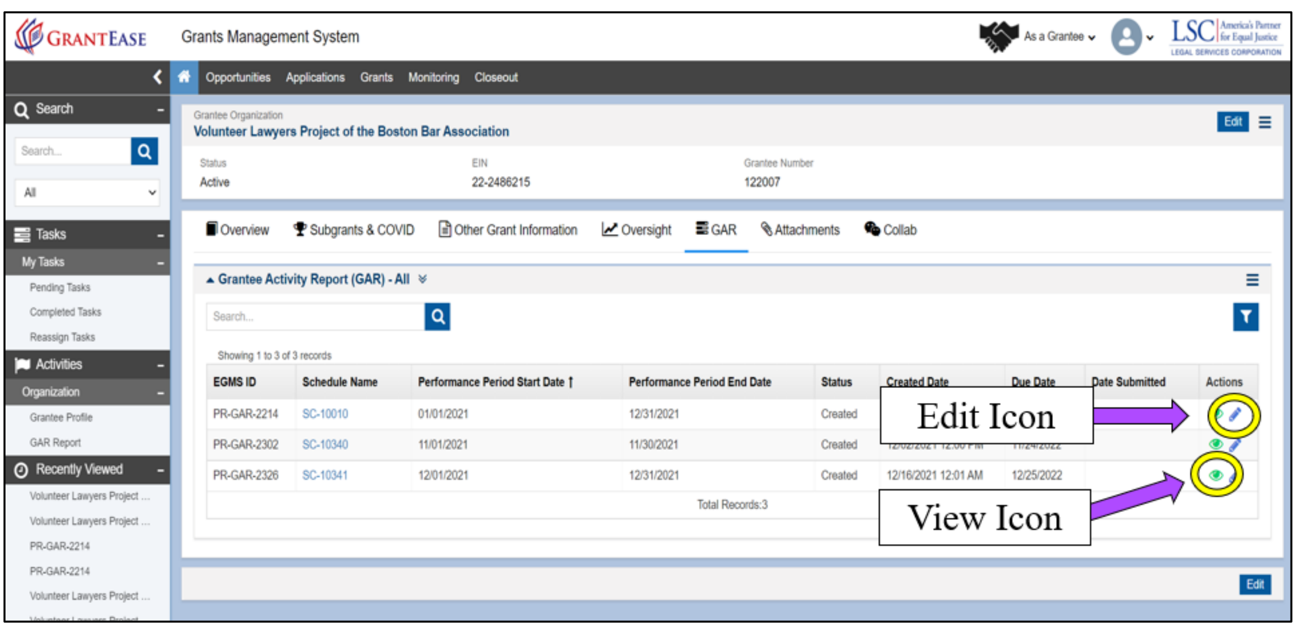


Figure 3: Image of the GAR Tab of the Grantee Profile and the View and Edit Icons

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***.

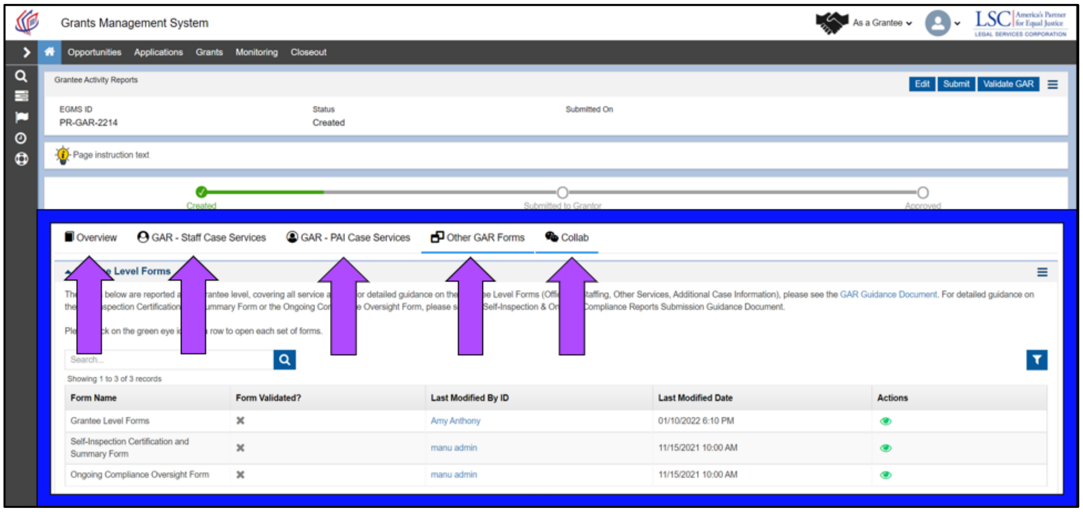


Figure 4: Image of the Grantee Activity Report Tabs

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.

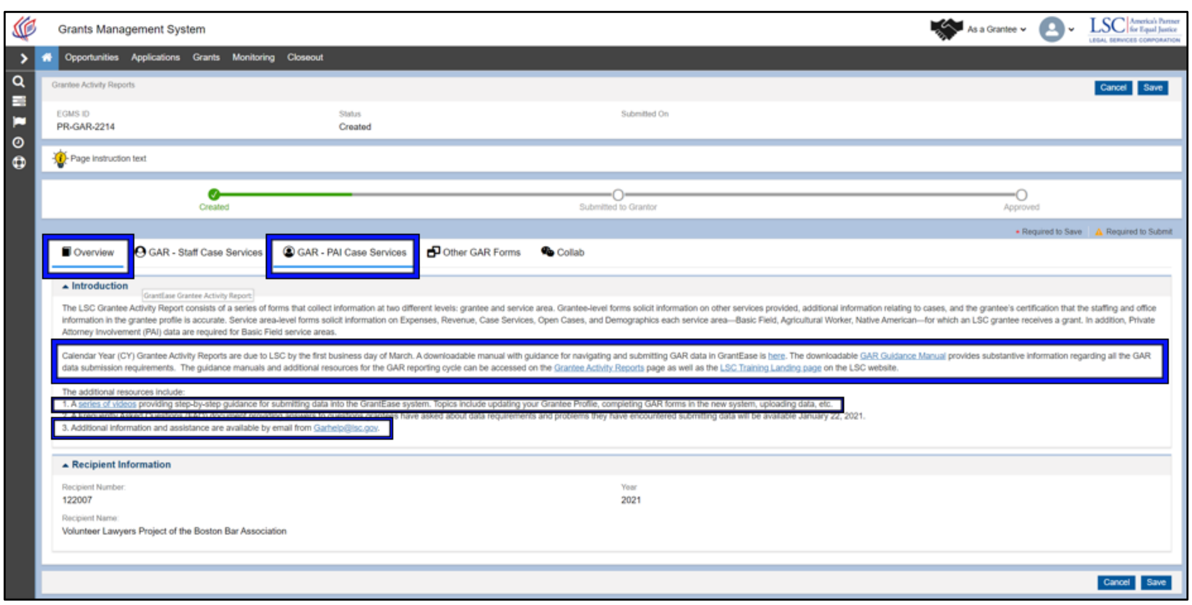


Figure 5: Image of the Introduction Section of the Overview Tab and Additional Resource Links for the GAR Reporting Forms

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.

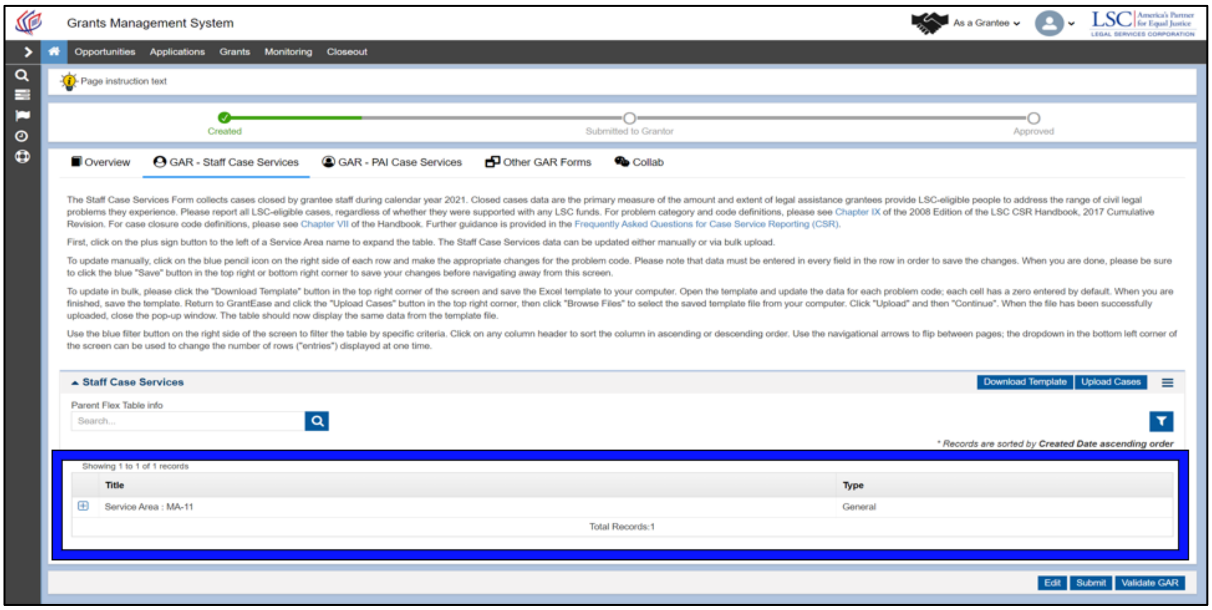


Figure 6: Image of the Service Areas Listed under the Staff Case Services Tab

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.

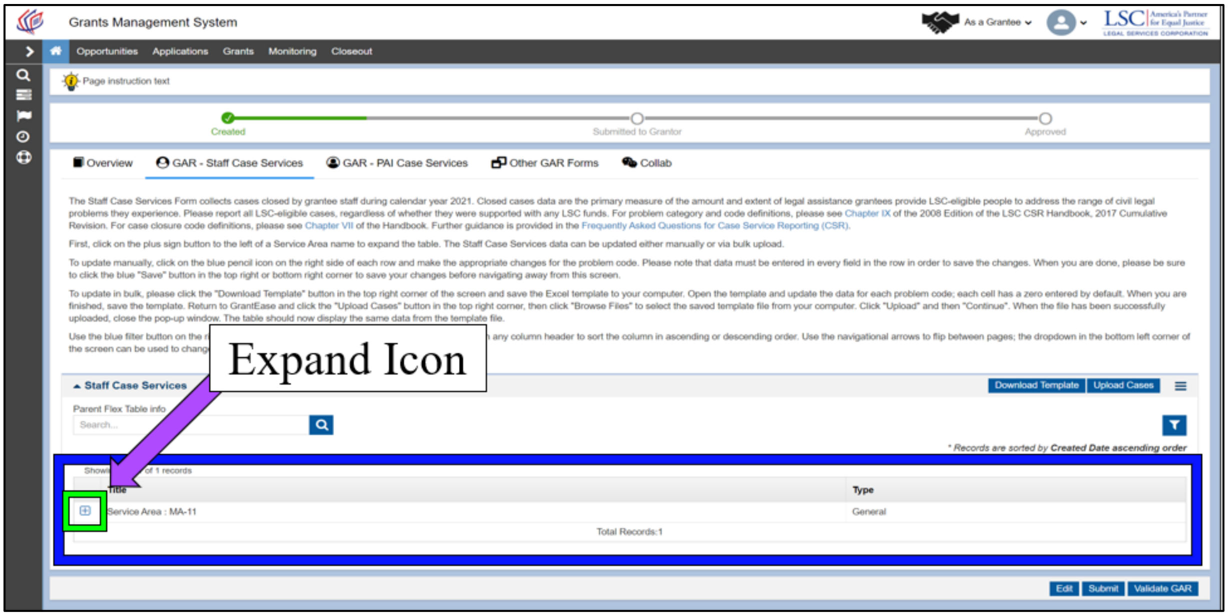


Figure 7: Image of the Expand Icon for a Service Area Listed under the Staff Case Services Tab

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

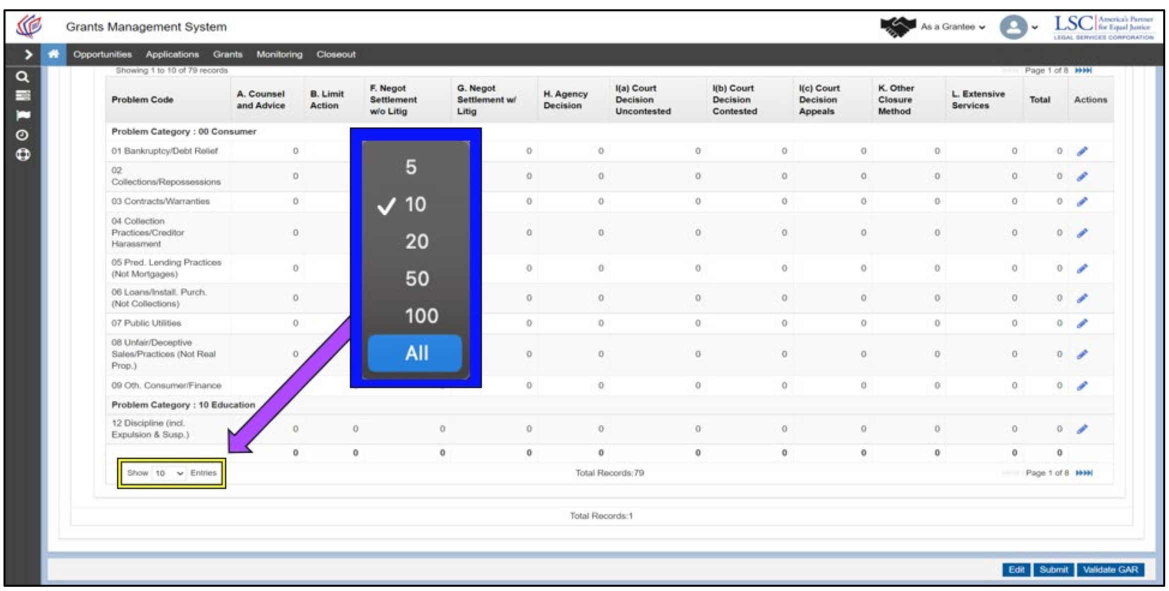


Figure 8: Image of Selecting "Display All Entries" on the Staff Case Services Tab

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.

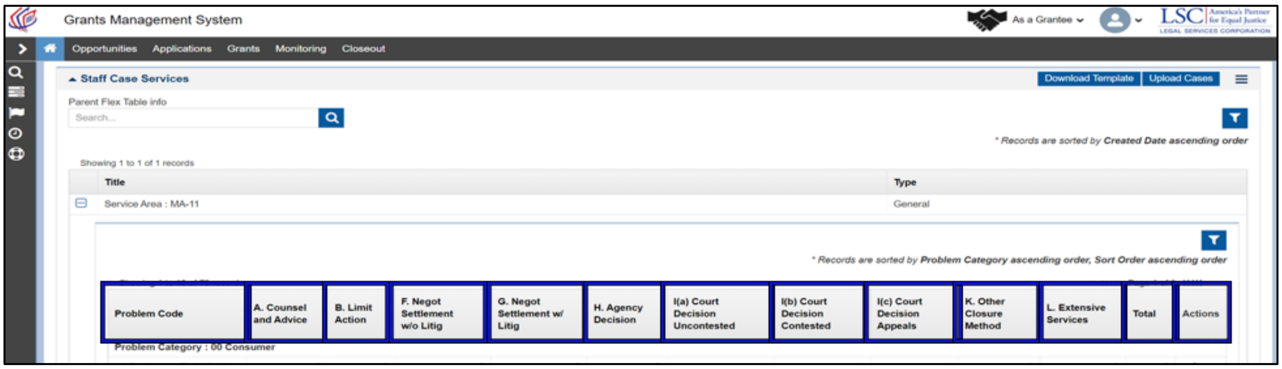


Figure 9: Image of the Data Entry Columns for the Service Area

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.

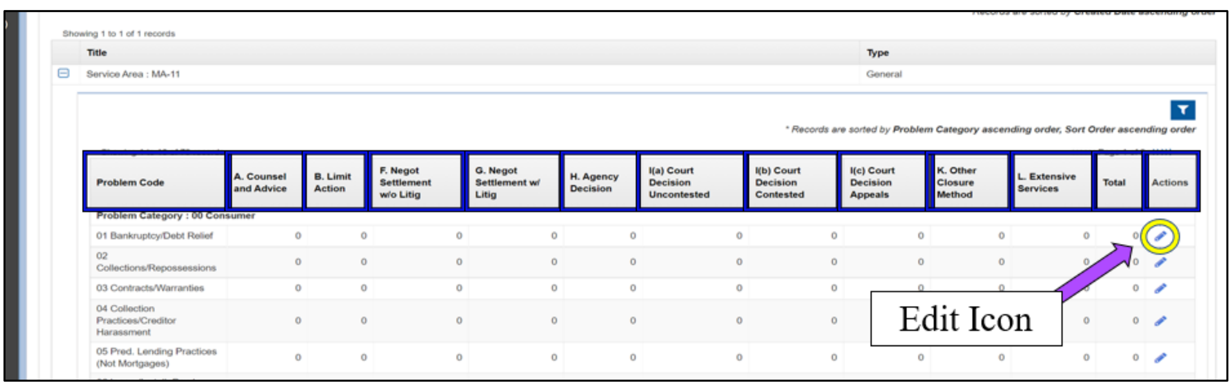


Figure 10: Image of the Edit Icon for Manual Data Entry of a Service Area

2021 GAR Reporting Guidance

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

NOTE:

- The system will **NOT** 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.

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.

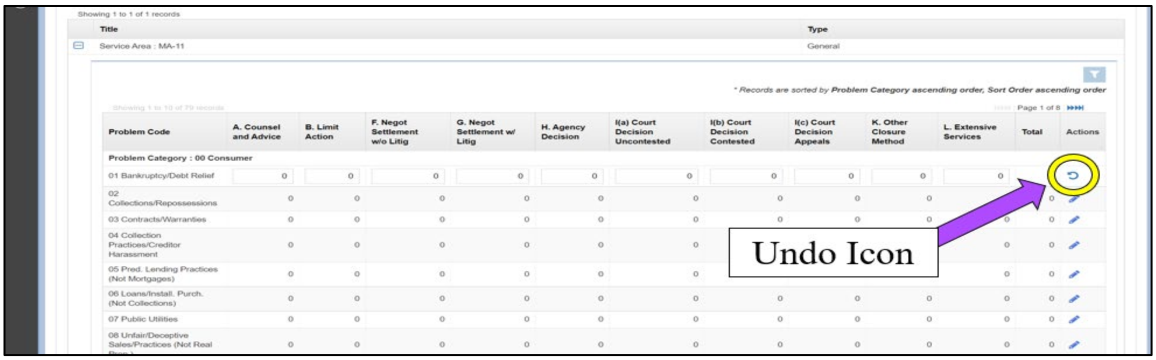


Figure 12: Image of the Undo Icon on a Service Area Data Entry Row

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.

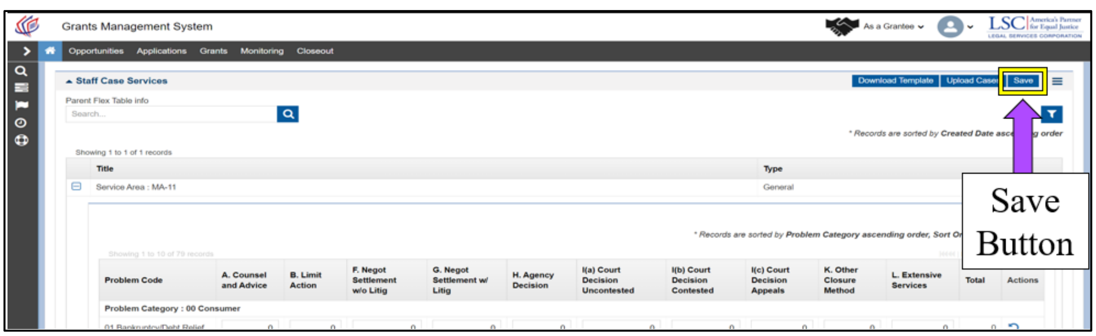


Figure 13: Image of Selecting the Save Button after Entering Data Manually

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.

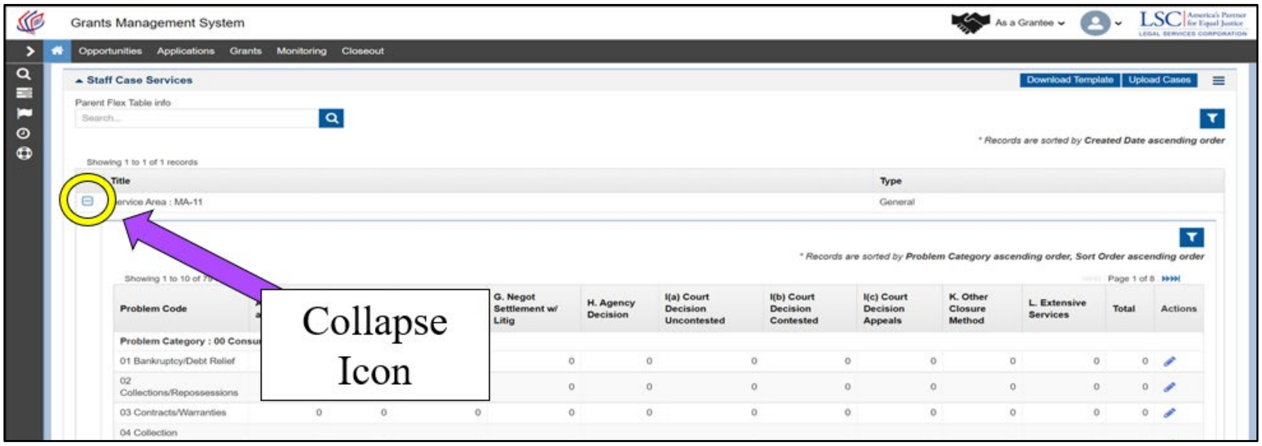


Figure 14: Image of the Collapse Icon to Minimize a Service Area

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

STEP 1: Click the "Download Template" button on the upper right side of the screen.
STEP 2: Click on the downloaded file to open it.
STEP 3: After receiving a warning that the file format and extension do not match, click "Yes" to open the file.
STEP 4: Enable editing (if that message appears) to begin entering data.

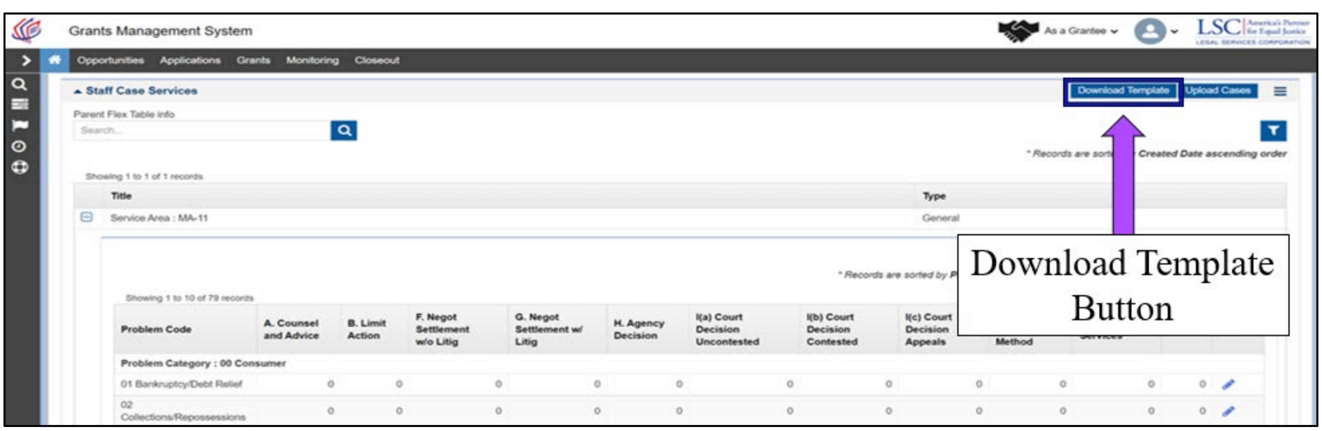


Figure 15: Image of the Staff Case Services Download Template Button

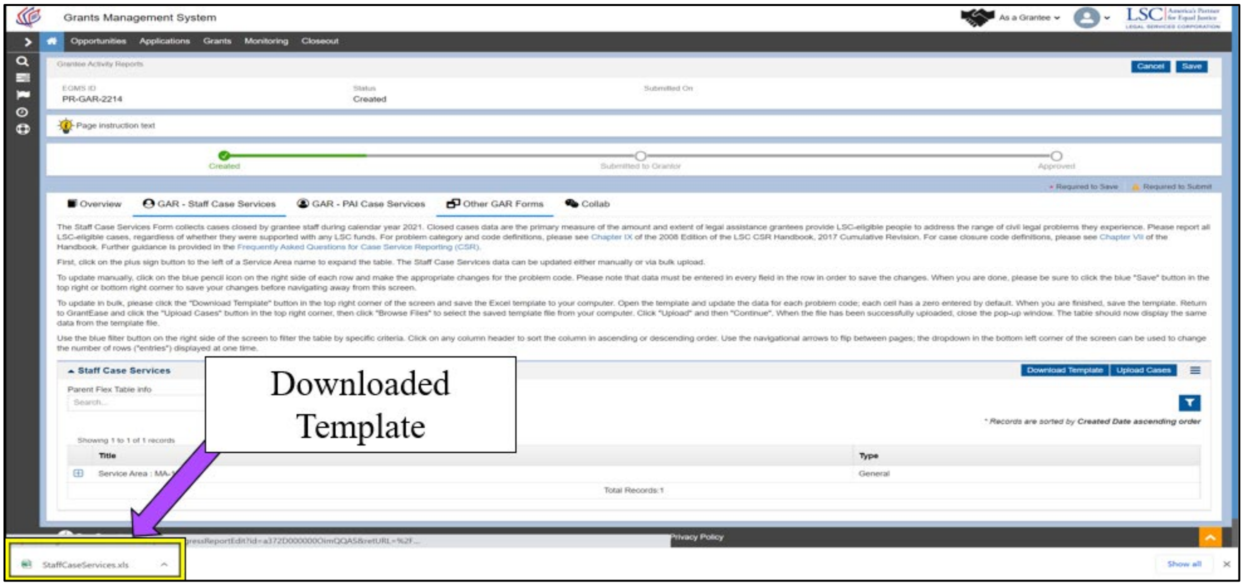


Figure 16: Image of the Downloaded Staff Case Services Template

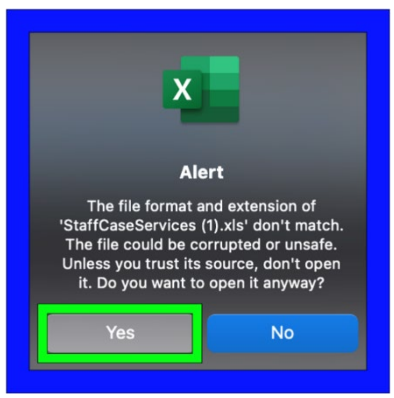


Figure 17: Image of Selecting "Yes" on the File Extension Alert Message

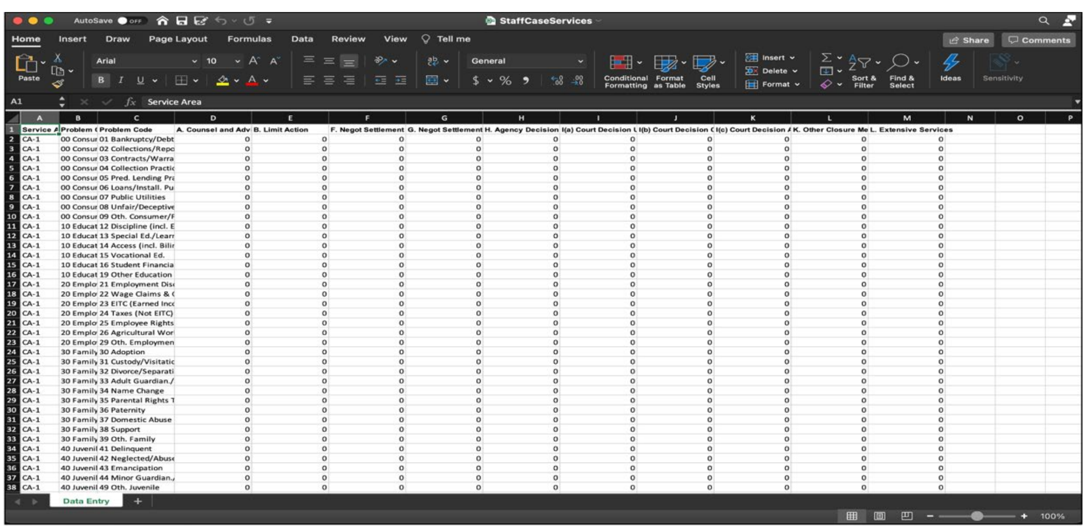


Figure 18: Image of the Opened Staff Case Services Excel Spreadsheet

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).

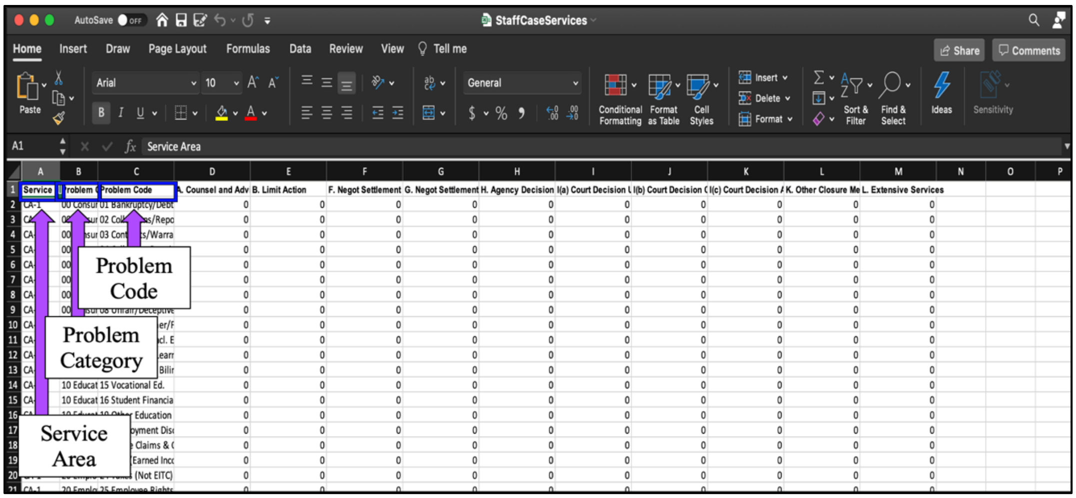


Figure 19: Image of the Row/Column Labels on the Staff Case Services Excel Spreadsheet

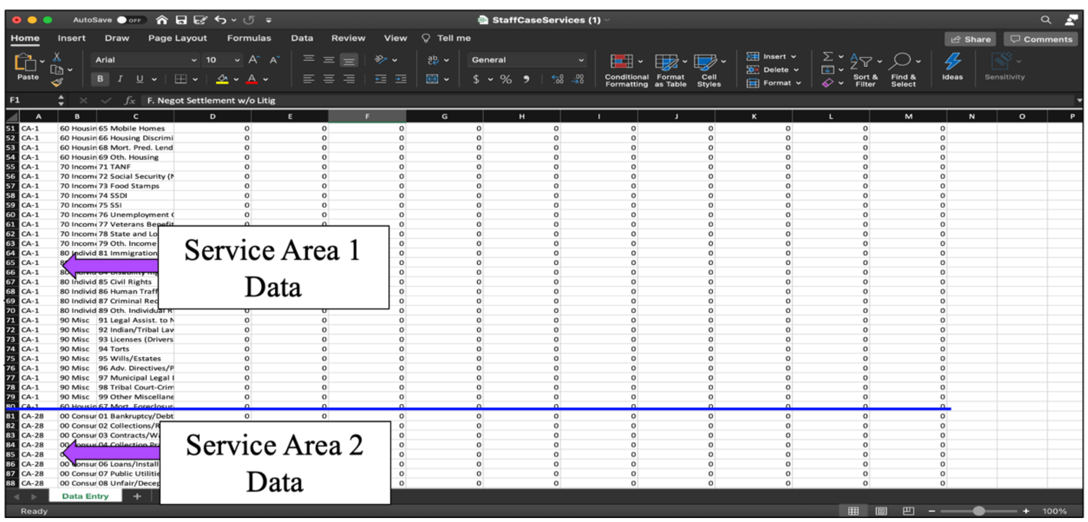
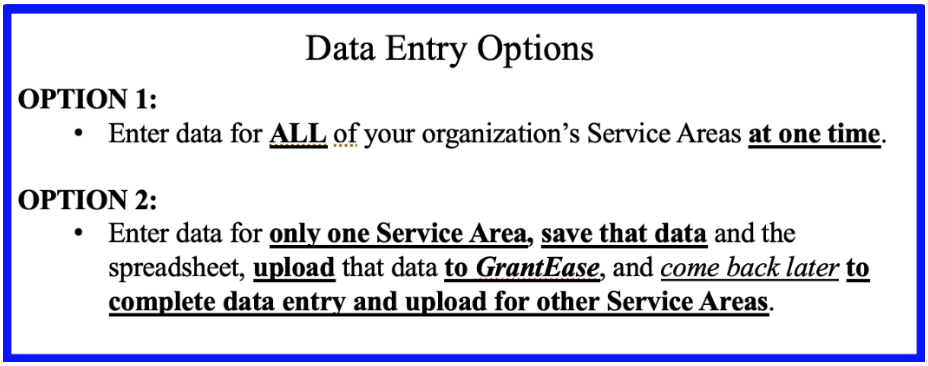


Figure 20: Image of Multiple Service Areas Listed in the Staff Case Services Excel Spreadsheet

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.



Data Entry Options

OPTION 1:

- Enter data for **ALL** of your organization's Service Areas **at one time**.

OPTION 2:

- Enter data for **only one Service Area, save that data** and the spreadsheet, **upload** that data **to *GrantEase***, and *come back later* **to complete data entry and upload for other Service Areas**.

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)

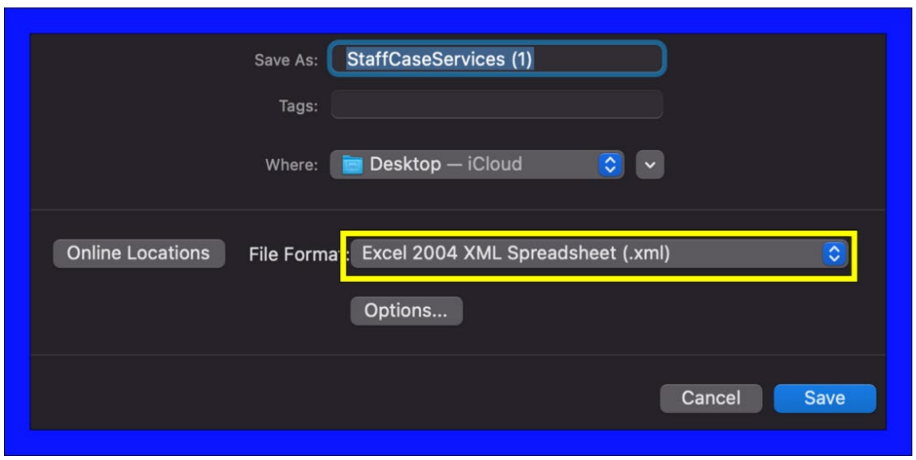


Figure 22: Image of Save Screen for the Staff Case Services Excel Spreadsheet

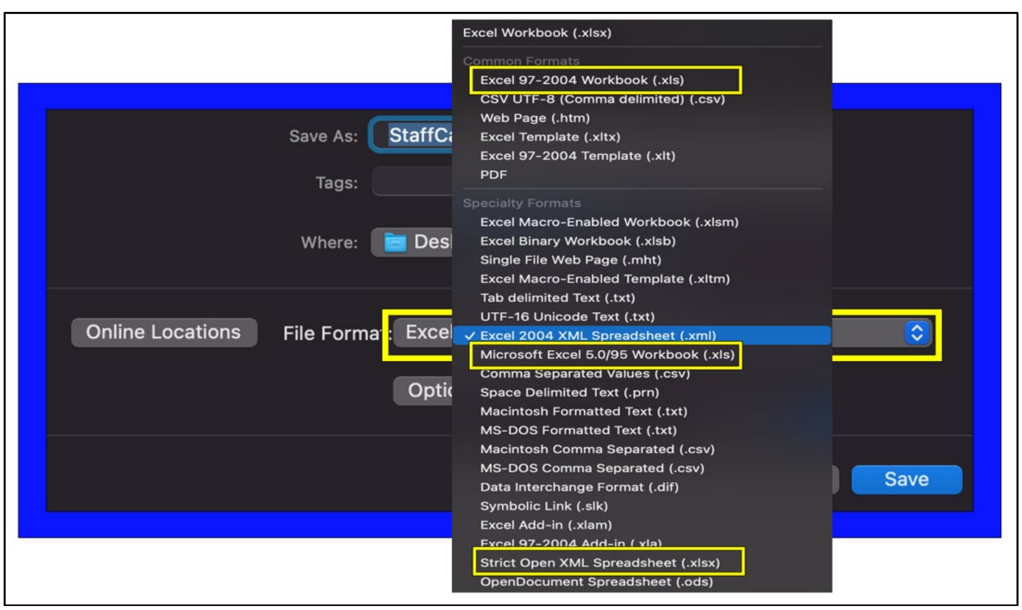


Figure 23: Image of the Correct File Formats for Saving the Staff Case Services Excel Spreadsheet

OR – Users can *continue entering data for the **EACH** service area* on the **same** 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 **ALL** 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.

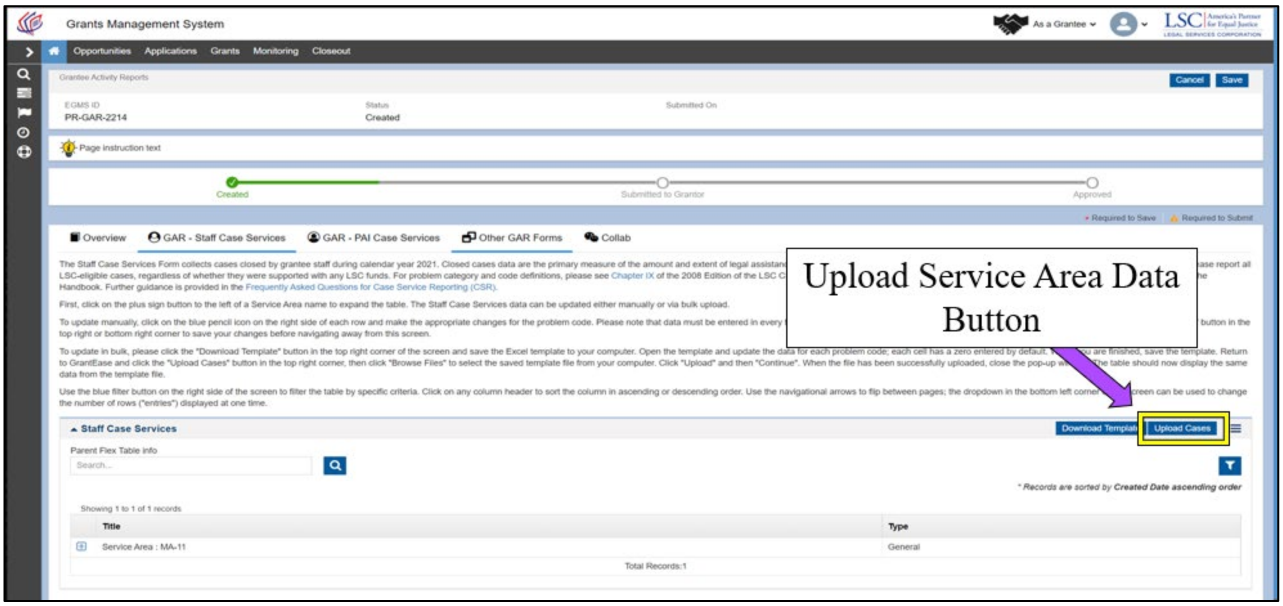


Figure 24: Image of the Upload Service Area Data Button

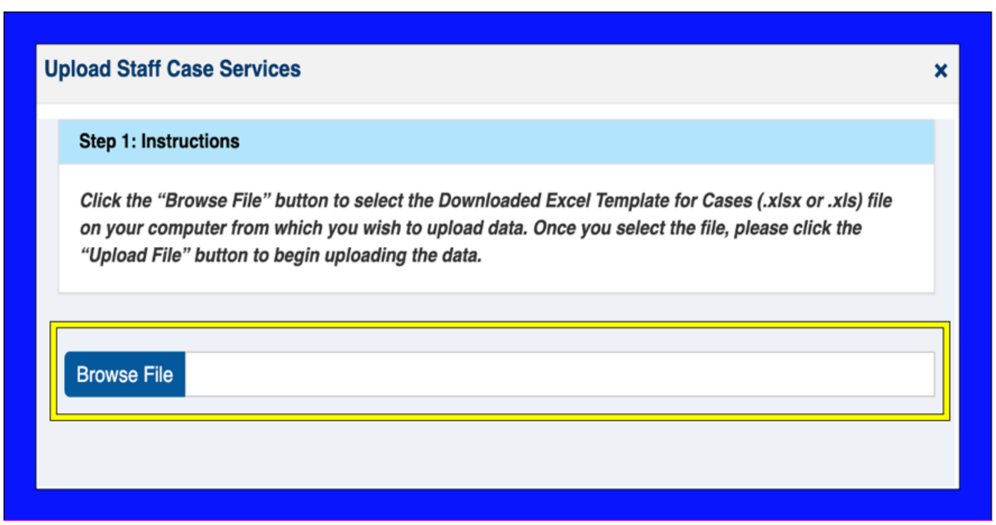


Figure 25: Image of Browsing for the Staff Case Services Excel File

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**."

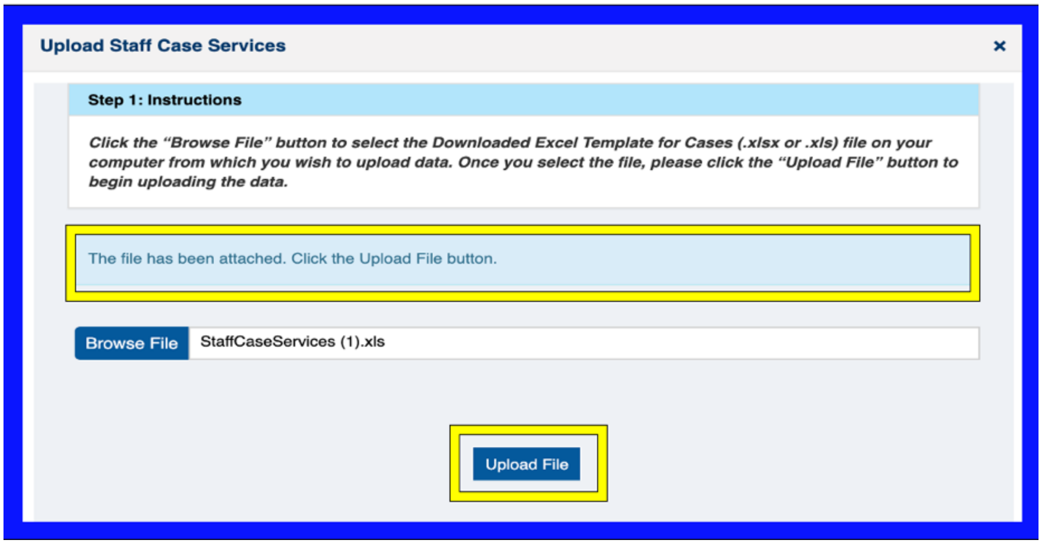


Figure 26: Image of the Attached Staff Case Services Excel File Ready for Upload

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.

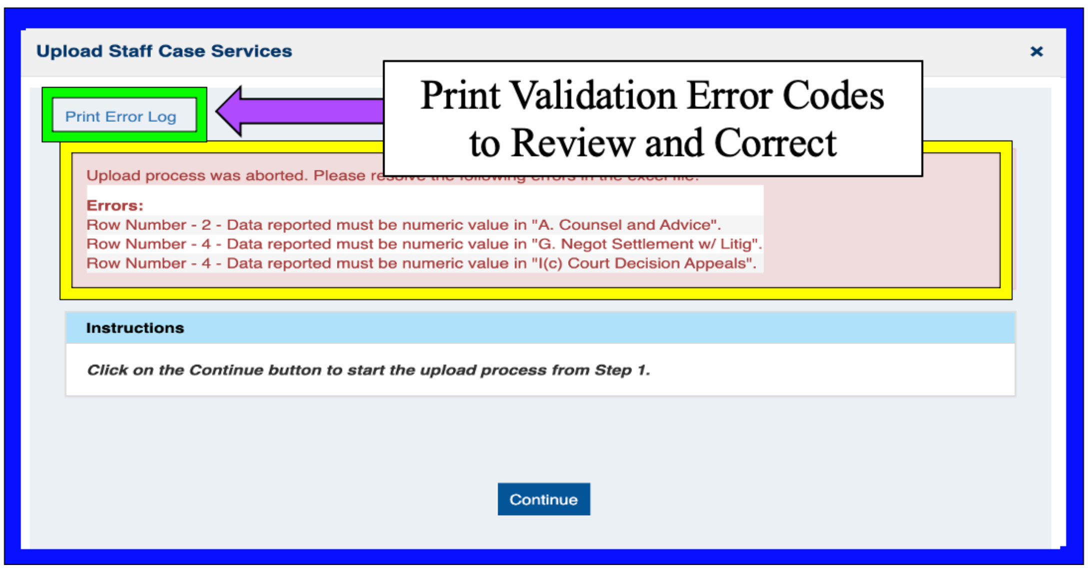


Figure 27: Image of Validation Error Messages for the Excel File and the Print Error Link

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.

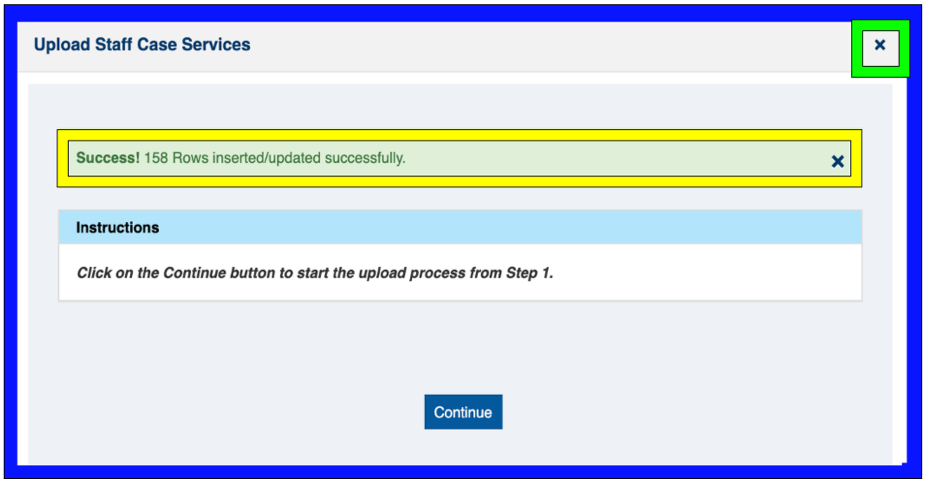


Figure 28: Image of the Successful File Upload Message

It is imperative that users know that this file **IS NOT LOCKED**. This means that ***whatever users enter is what will appear upon uploading the document*** 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 **ONLY** 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**.

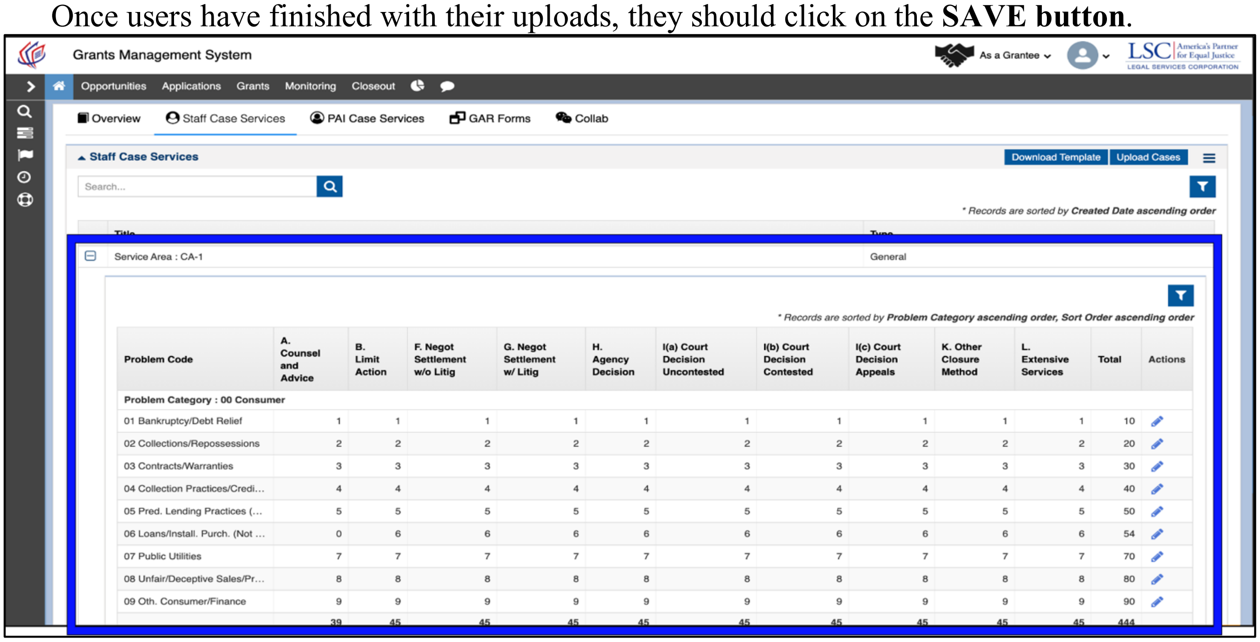


Figure 29: Image of Saved Data from the Uploaded Staff Case Services Excel File

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 required to upload the same data as above but for GAR-PAI Case Services.

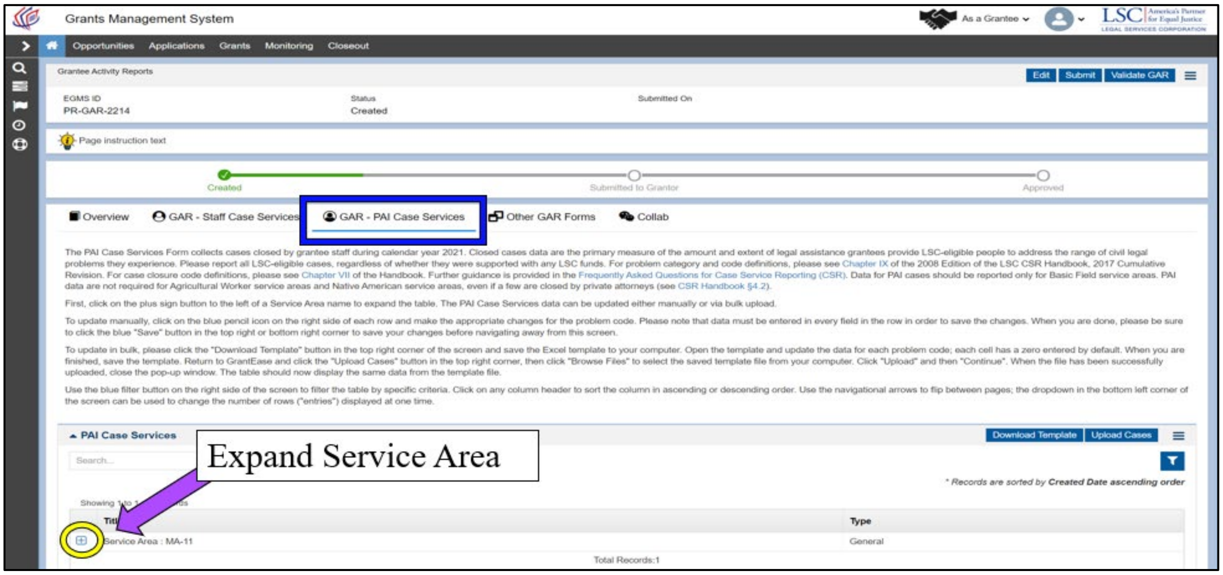


Figure 30: Image of the PAI Case Services Tab and Expand Icon

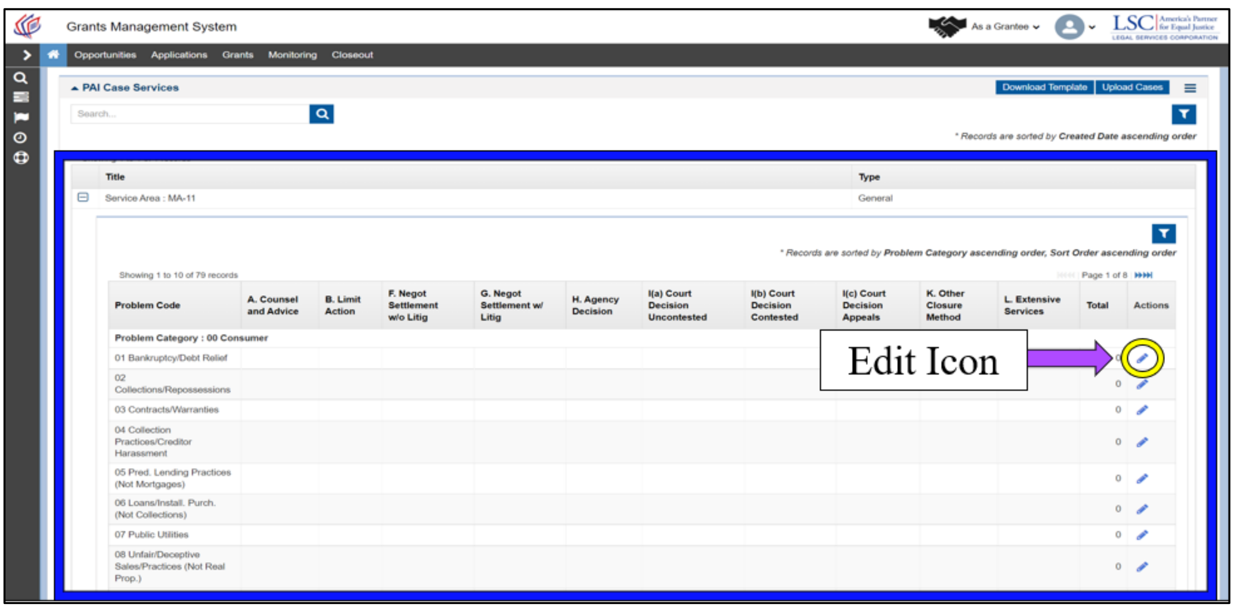


Figure 31: Image of the Edit Icon for Manual Data Entry in this Service Area

If users **do not** 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.

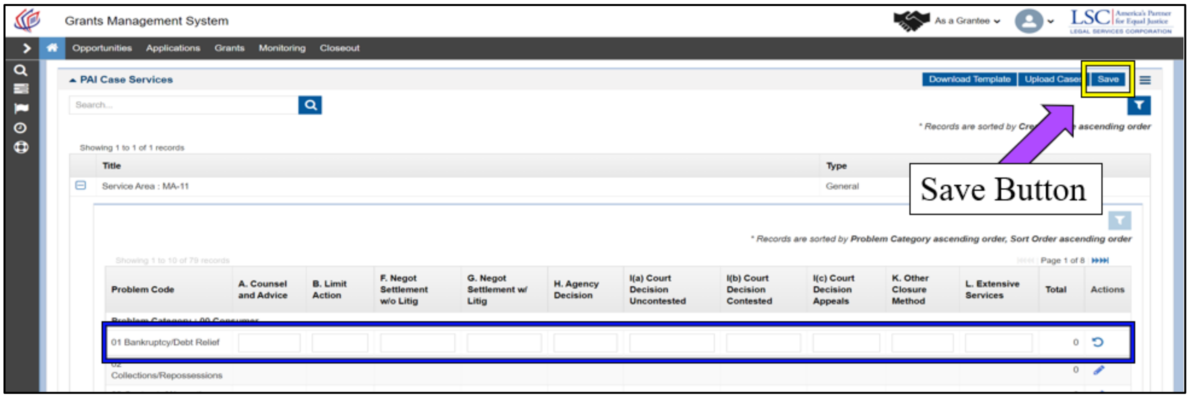


Figure 32: Image of Selecting the Save Button for Data Manually Entered into the Service Area

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.

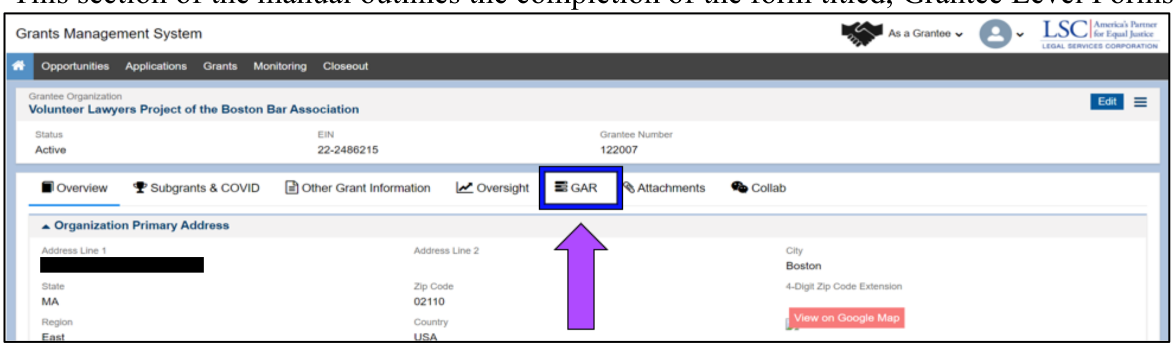


Figure 1: Image of Navigating to the GAR Forms Tab

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

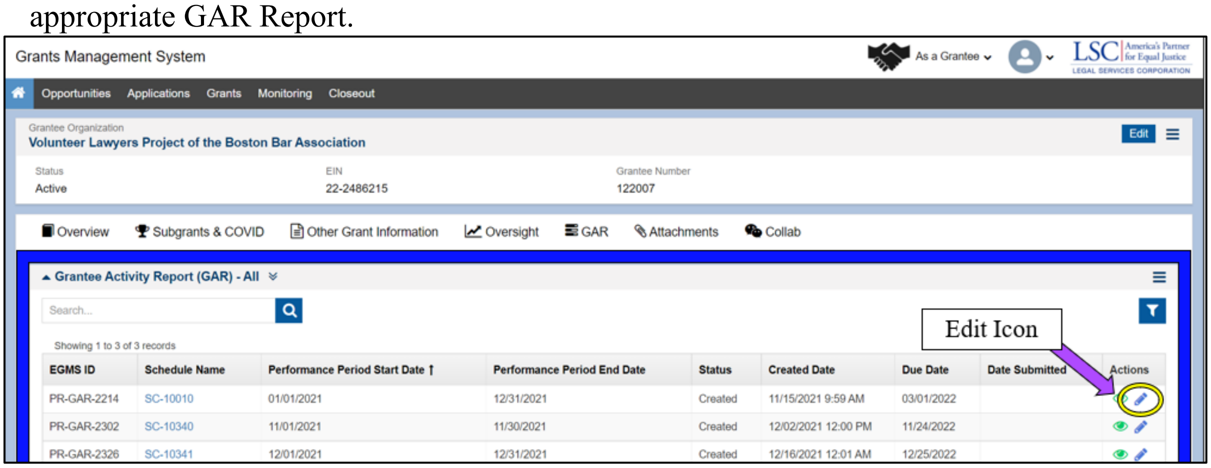


Figure 2: Image of the View Icon for the Grantee Level Form

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

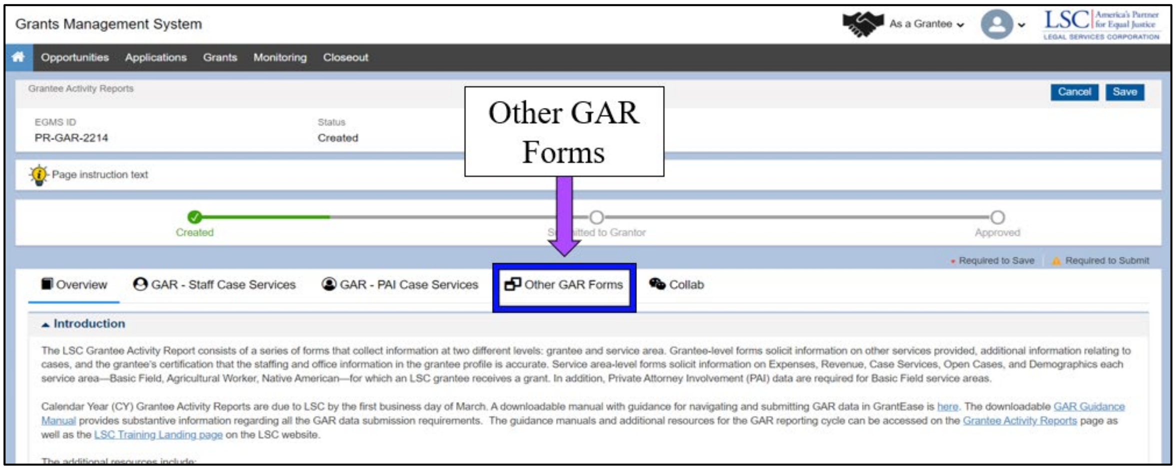


Figure 3: Image of Navigating to the Other GAR Forms Tab

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**.

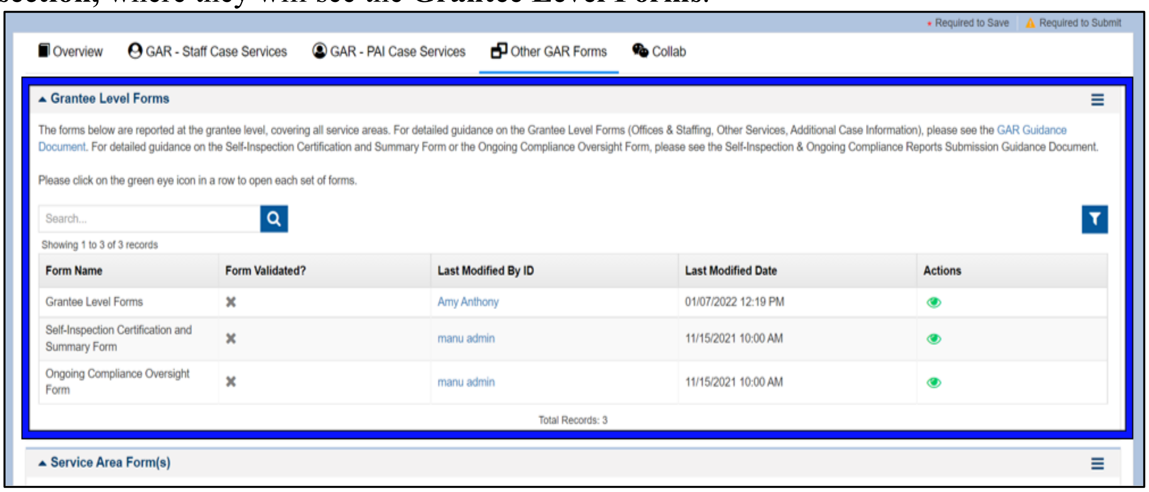


Figure 4: Image of Locating the Grantee Level Forms in the Other GAR Forms Tab

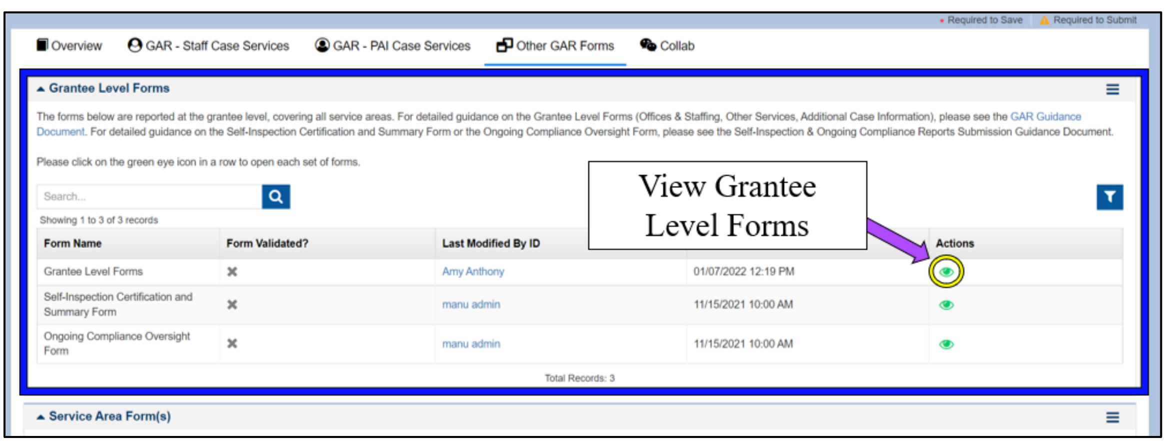


Figure 5: Image of Selecting the View Icon for Grantee Level Forms in the Other GAR Forms Tab

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, they should go back and update ALL staff contacts and ALL office locations, 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.**

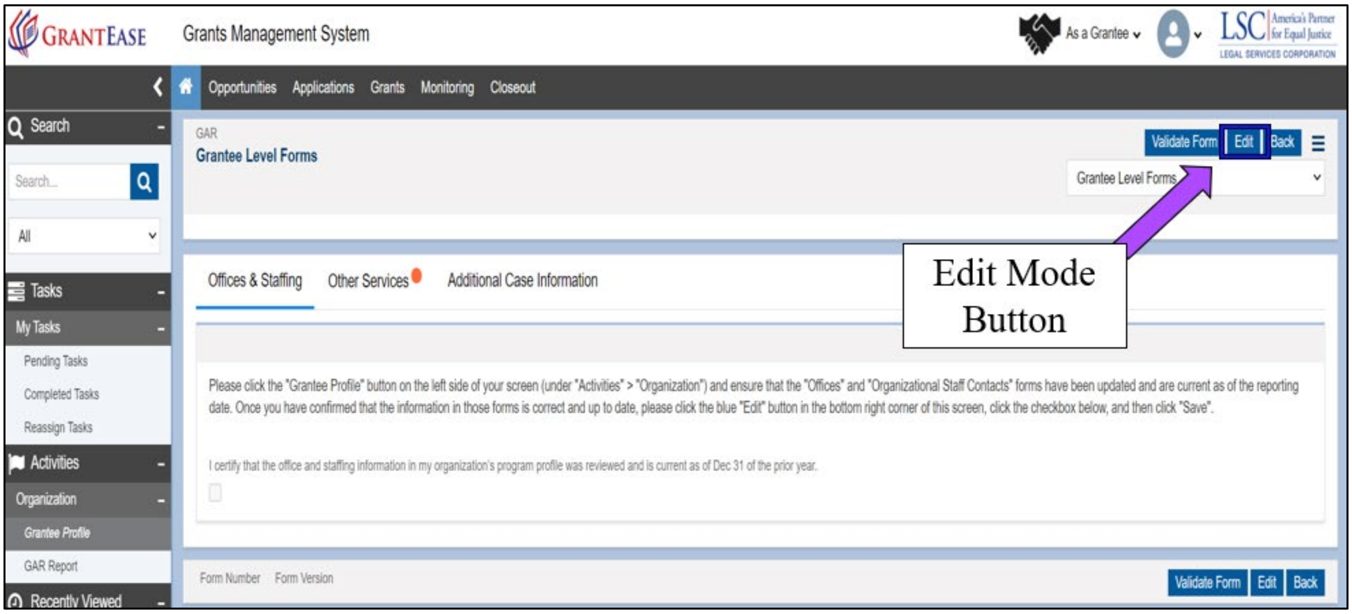


Figure 6: Image of Selecting the Edit Mode Button on the Grantee Level Form

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.

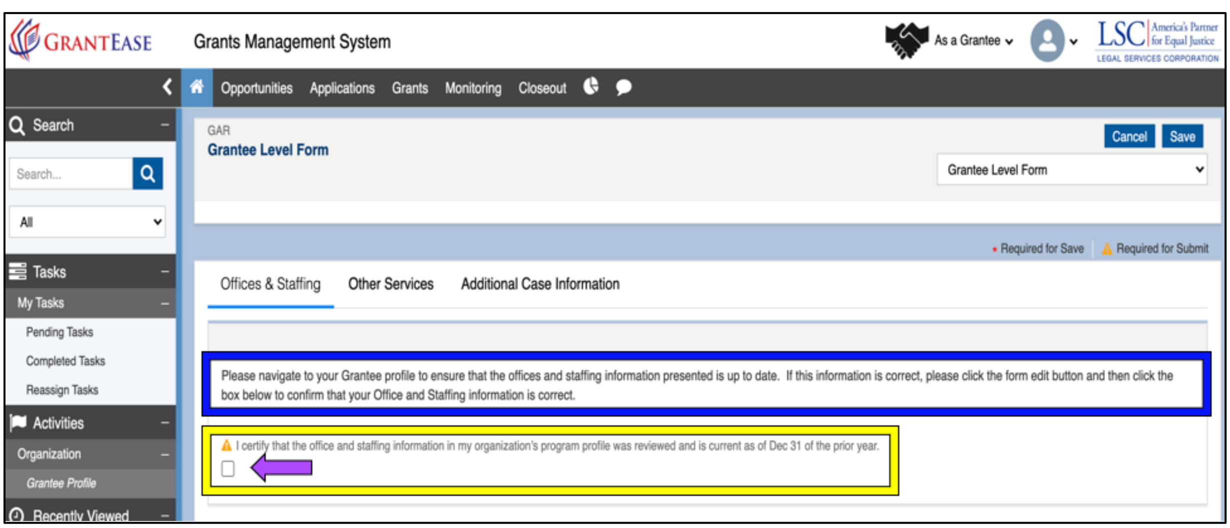


Figure 7: Image of the Staffing and Office Review Certification Checkbox

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

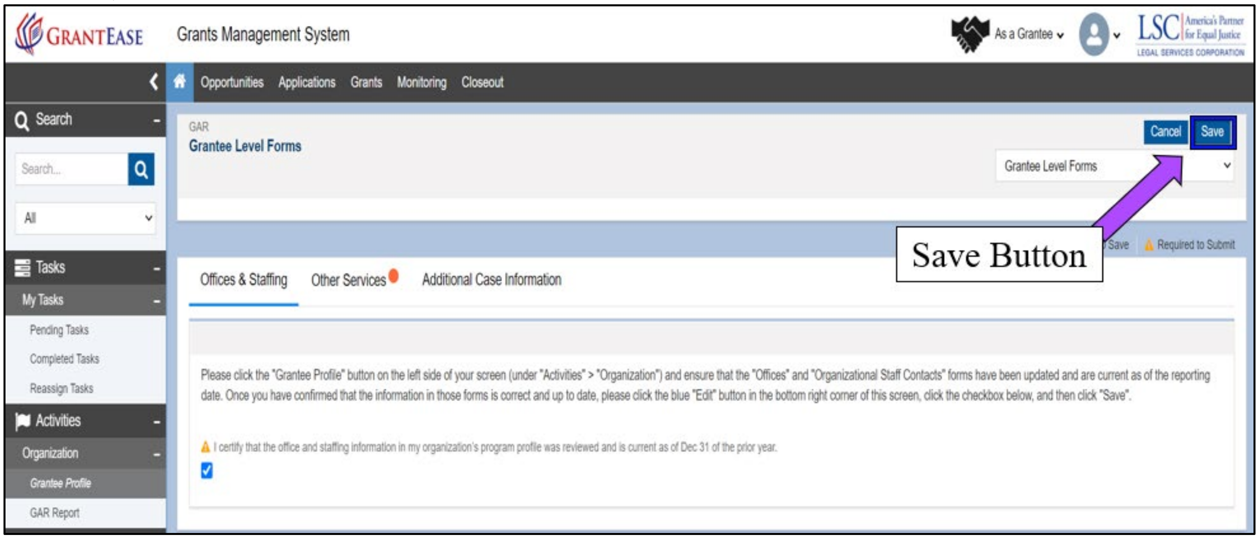


Figure 8: Image of Selecting the Save Button on the Certified Offices & Staffing Tab of the Grantee Level Form

Other Services Tab

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

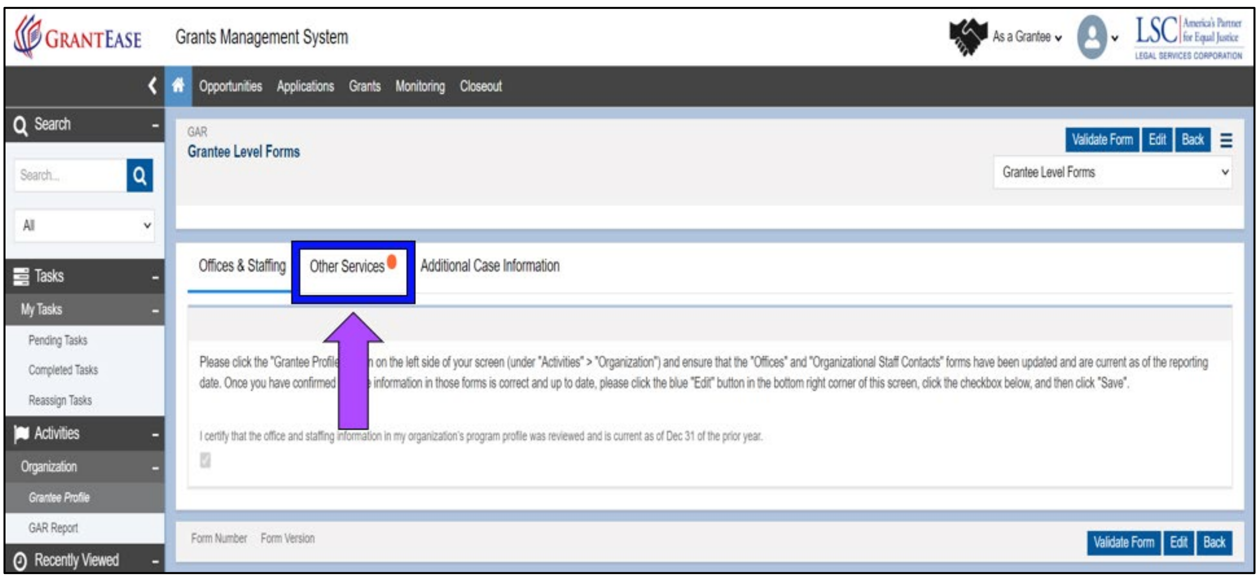


Figure 9: Image of Other Services Tab

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."*

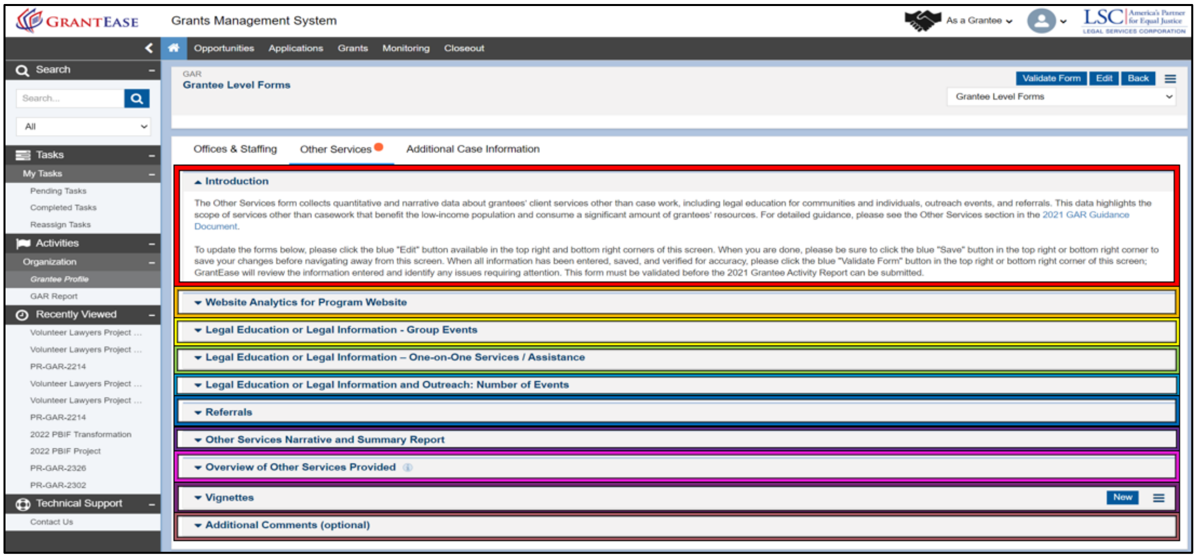


Figure 10: Image of the Other Services Tab Sections

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**.

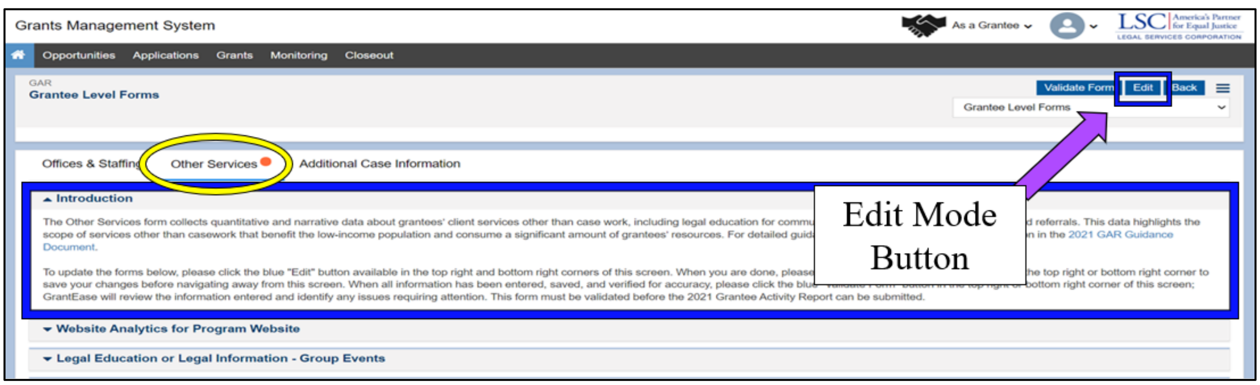


Figure 11: Image of the Missing Information Dot and the Edit Mode Button

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

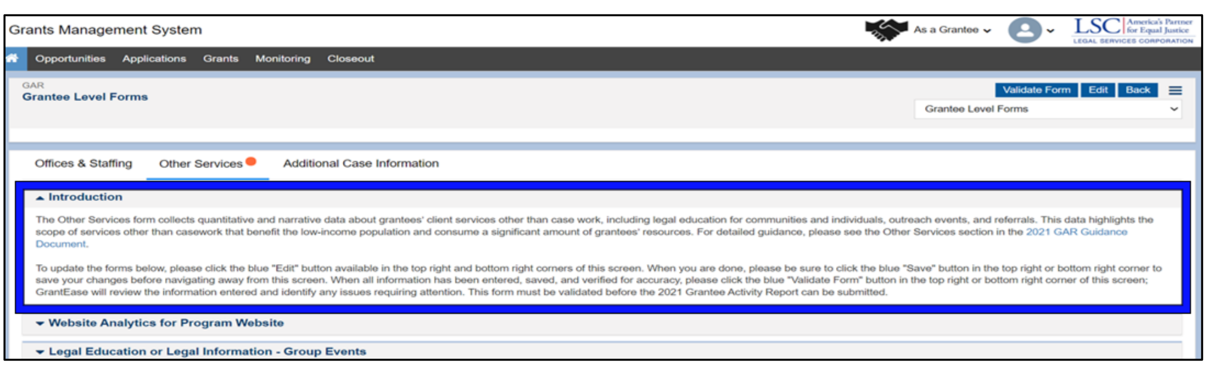


Figure 12: Image of the Introduction Section of the Other Services Tab

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

Users must **save every section** 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**.

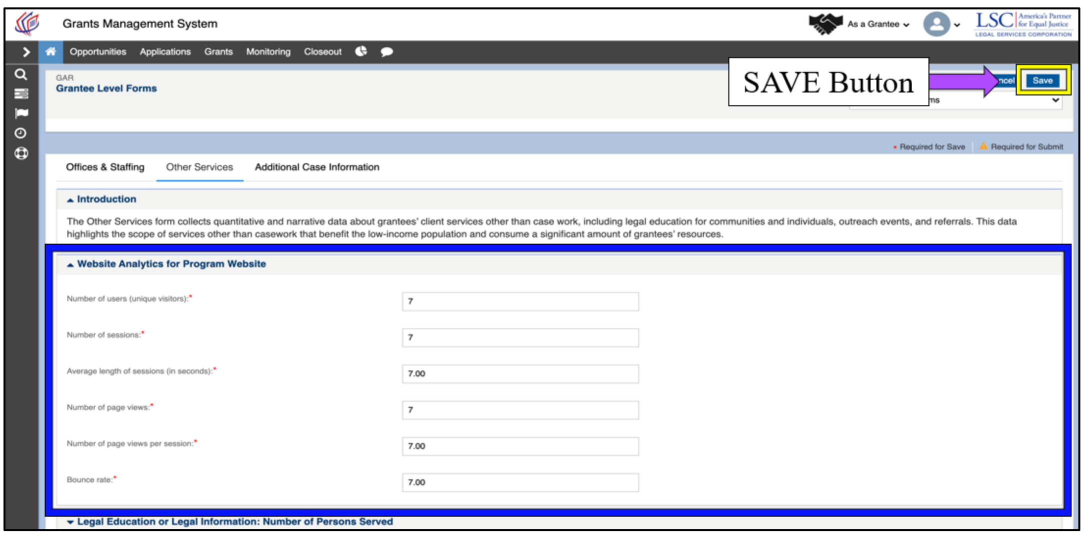


Figure 13: Image of the Completed Website Analytics Section in Edit Mode and Selecting the Save Button

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.

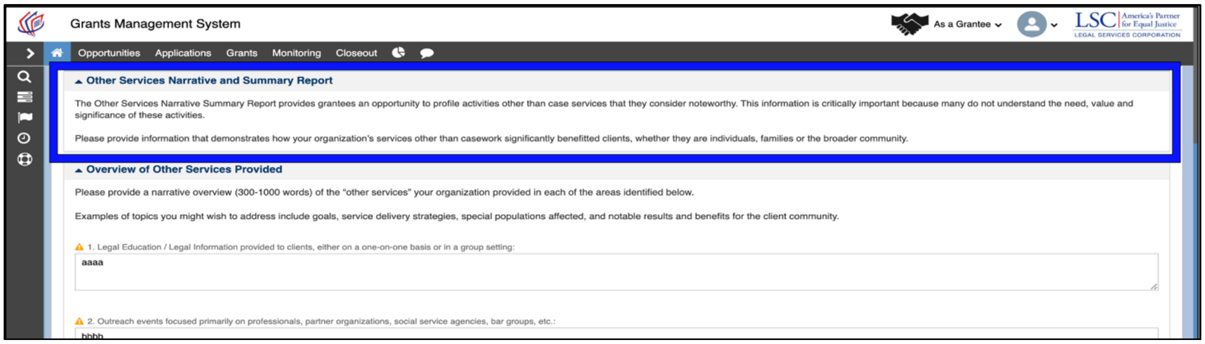


Figure 14: Image of the Other Services Narrative and Summary Report Explanation

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

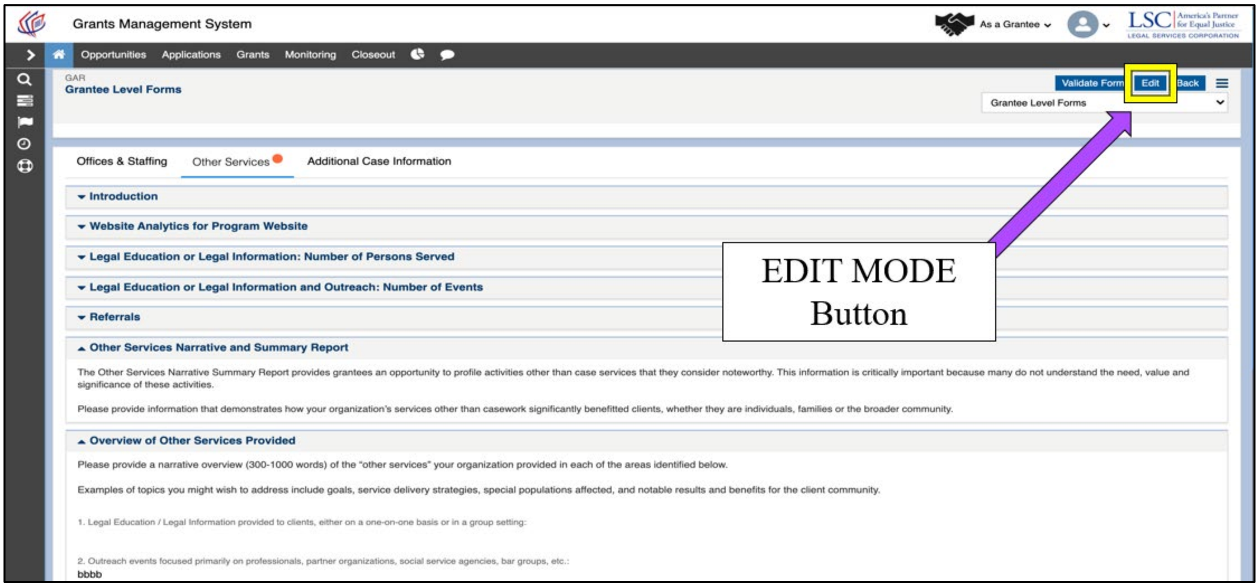


Figure 15: Image of the Other Services Narrative and Summary Report Explanation

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 four fields in this section. Once finished with this section, be sure to click the **SAVE button**.

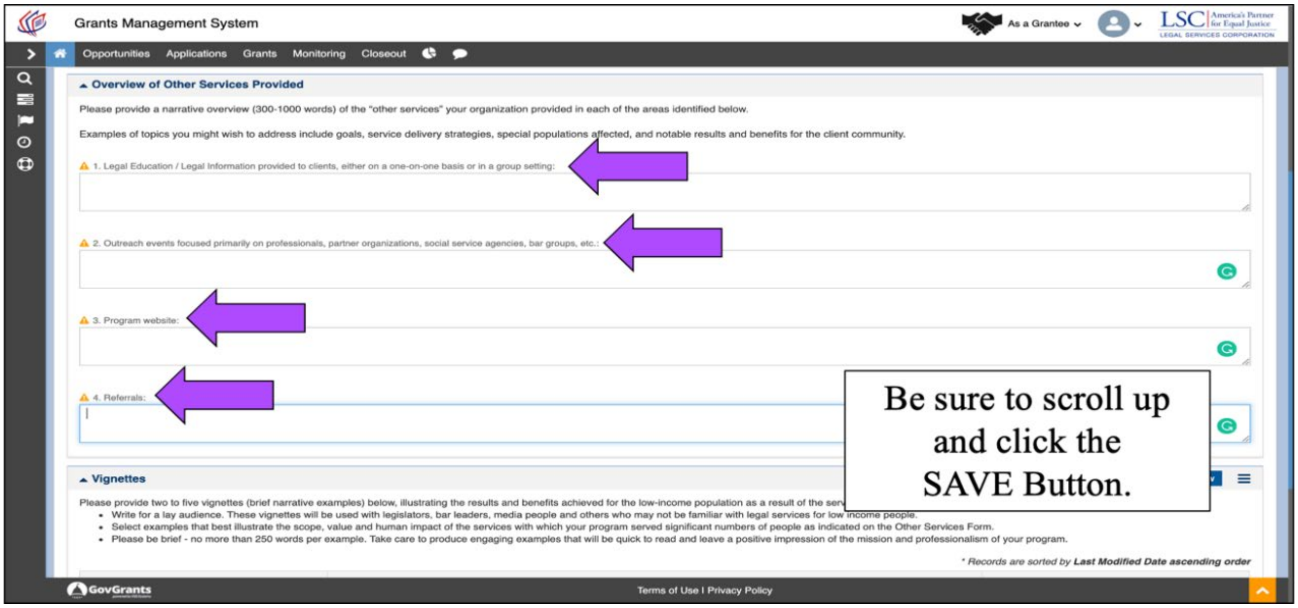


Figure 16: Image of the Four Narrative Boxes of the Other Services Narrative Summary and Report

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 **be brief** 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**.

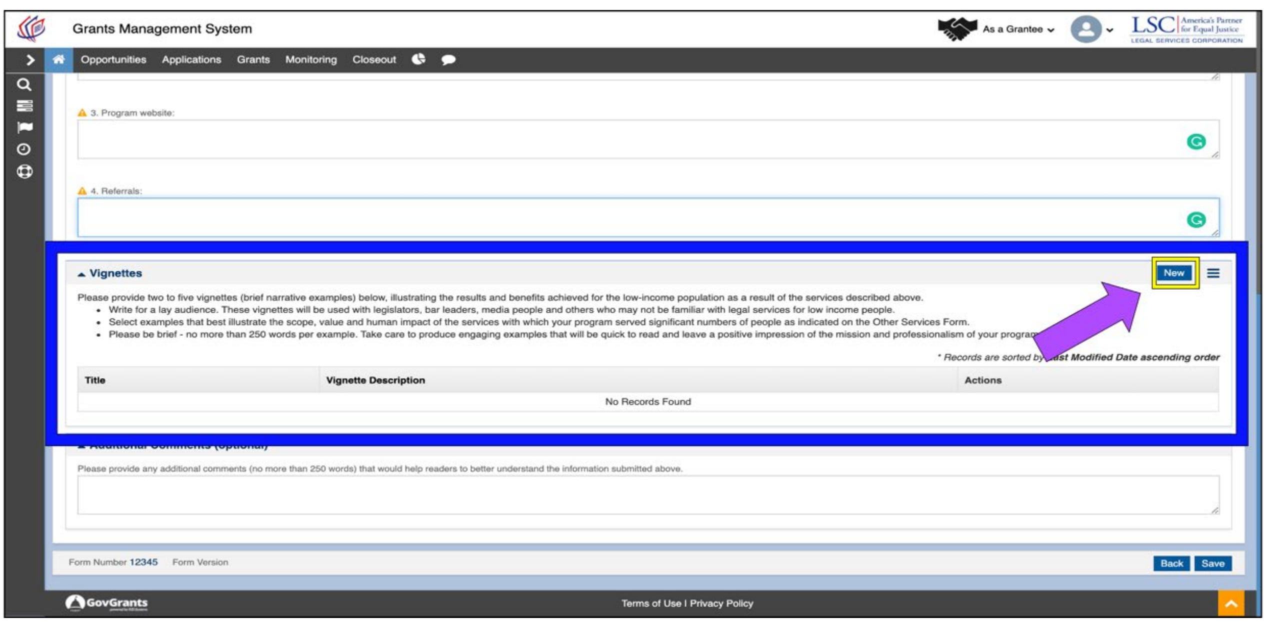


Figure 17: Image of the Vignettes Section of the Other Services Tab and the New Vignette Button

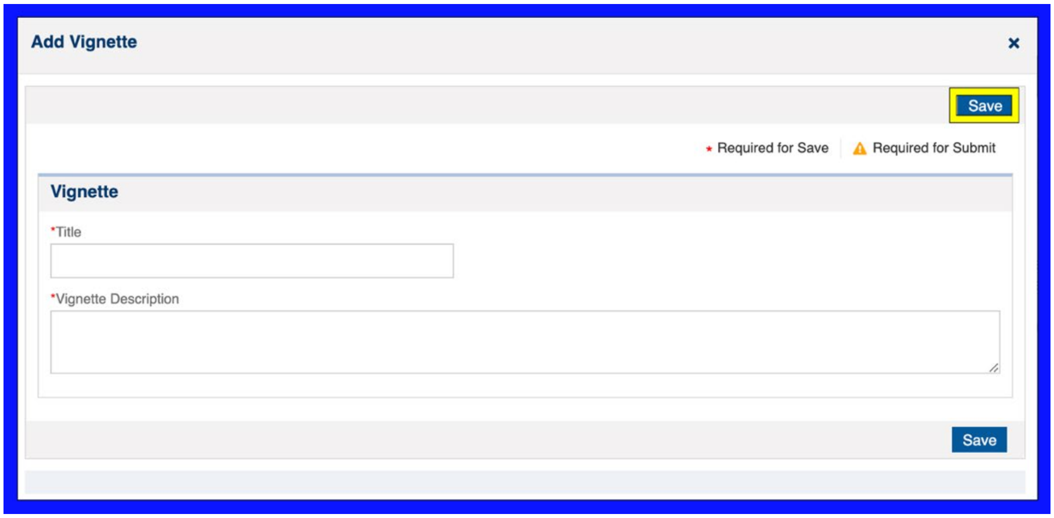


Figure 18: Image of the Add Vignette Pop-up Screen and Selecting the Save Button

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.

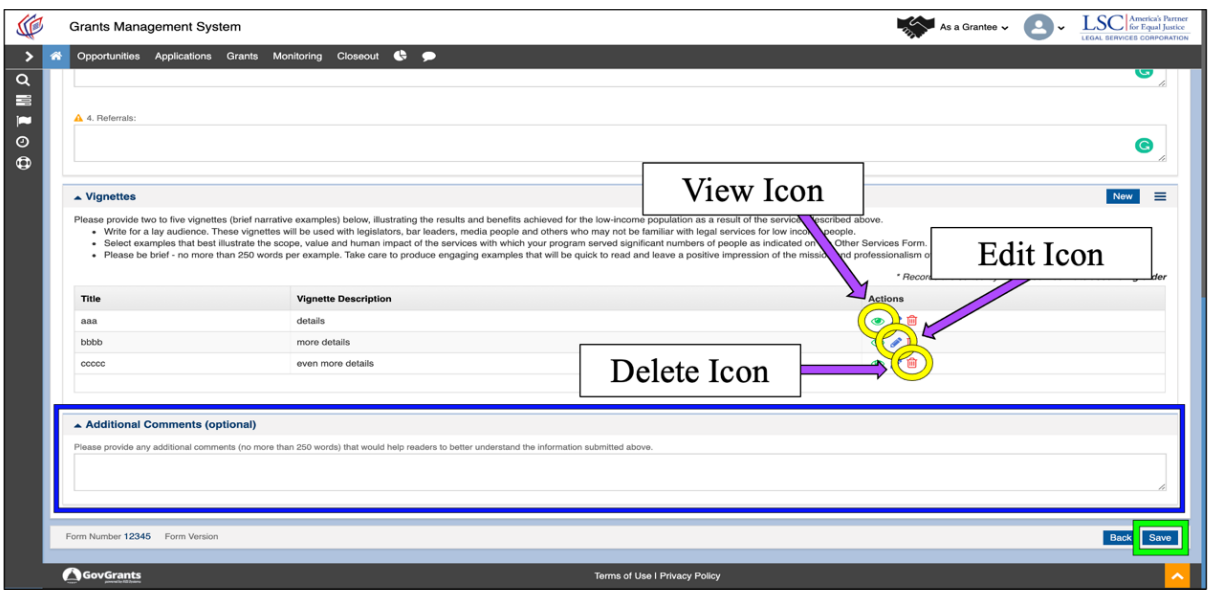


Figure 19: Image of the View, Edit, and Delete Icons in the Vignettes Section and the Additional Comments Section

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.

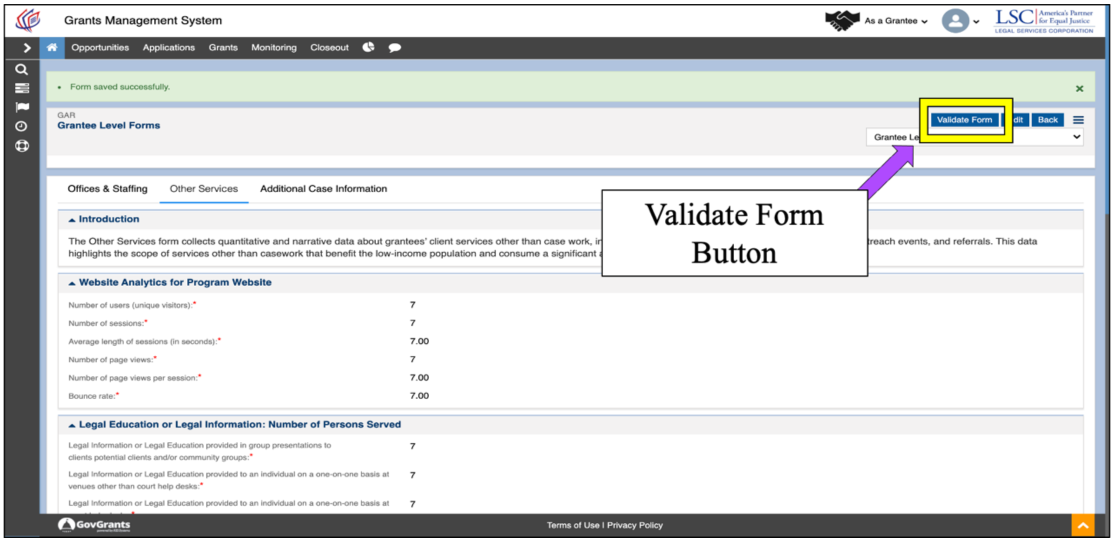


Figure 20: Image of the Validate Form Button for the Other Services Section

Additional Case Information

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

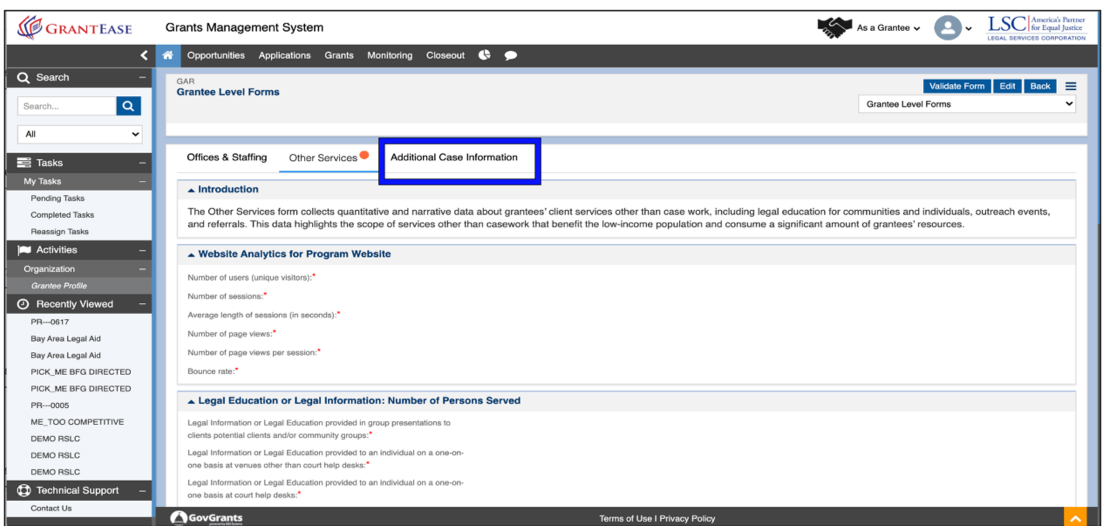


Figure 21: Image of Navigating to the Additional Case Information Tab

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 Reported to LSC</u>. Once finished, users should click on the **Save button**.

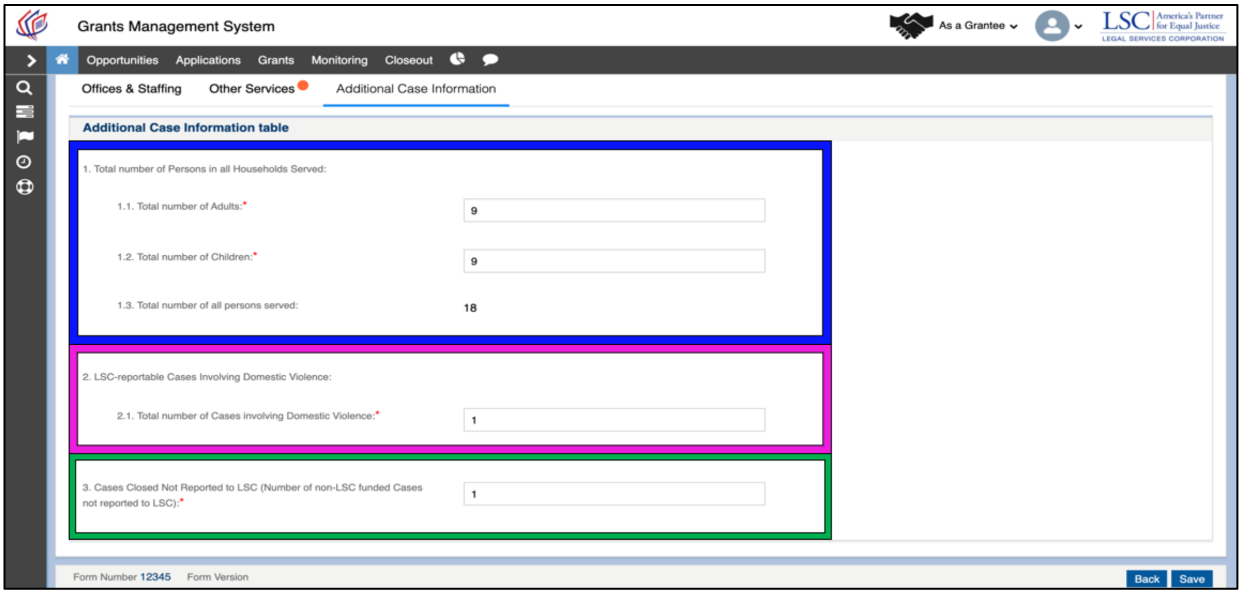


Figure 22: Image of the Table on the Additional Case Information Tab in Edit Mode

[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.

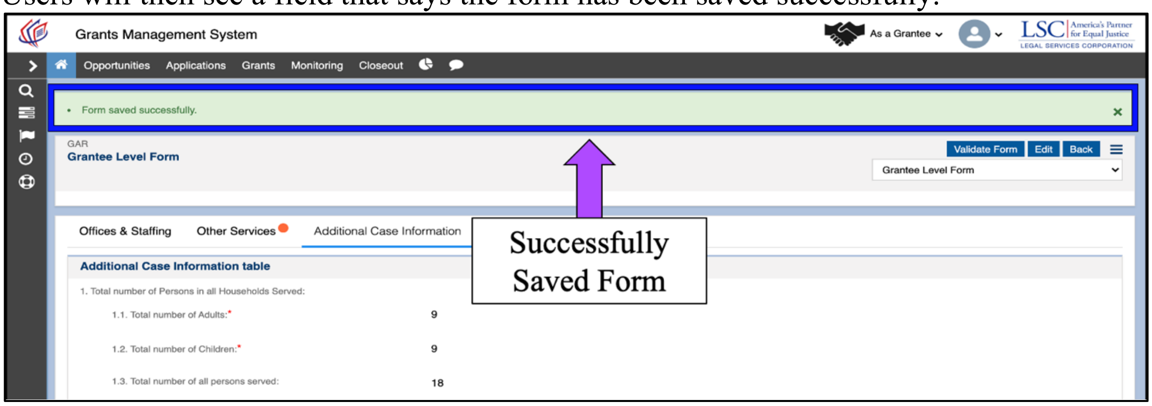


Figure 23: Image of the Successfully Saved Form Message

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

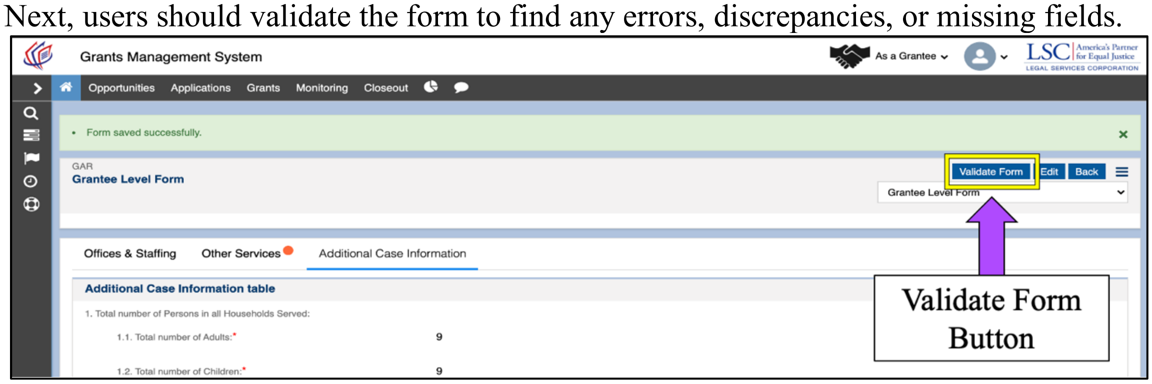


Figure 24: Image of the Validate Form Button for Additional Case Information

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.

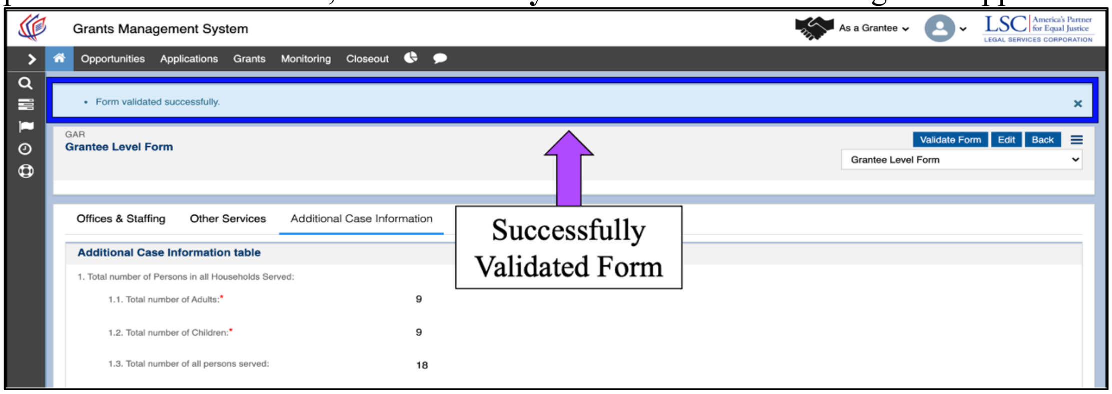


Figure 25: Image of the Successfully Validated Form Message for the Additional Case Information Form

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.

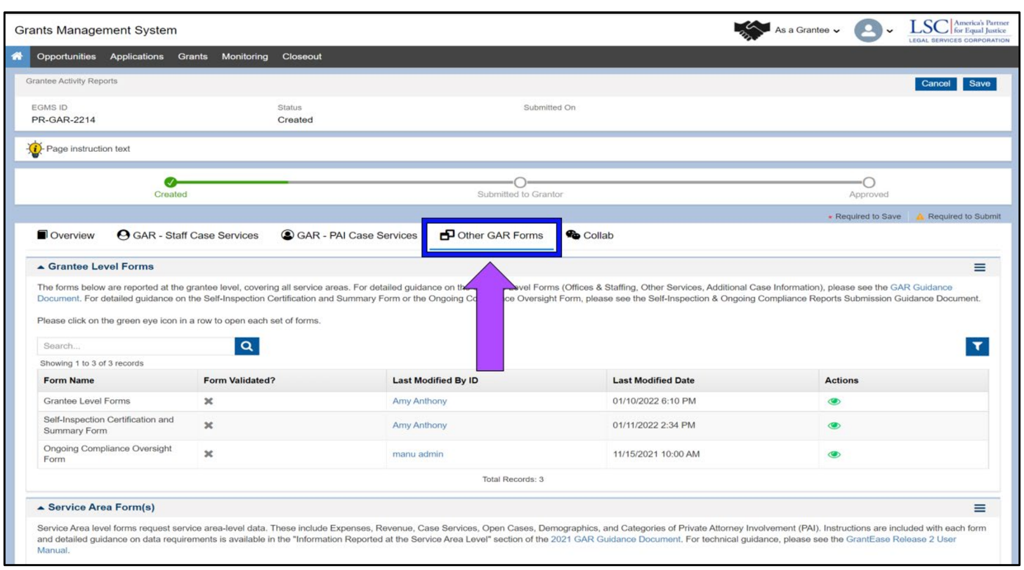


Figure 1: Image of the Other GAR Forms tab on the Grantee Activity Reports page

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

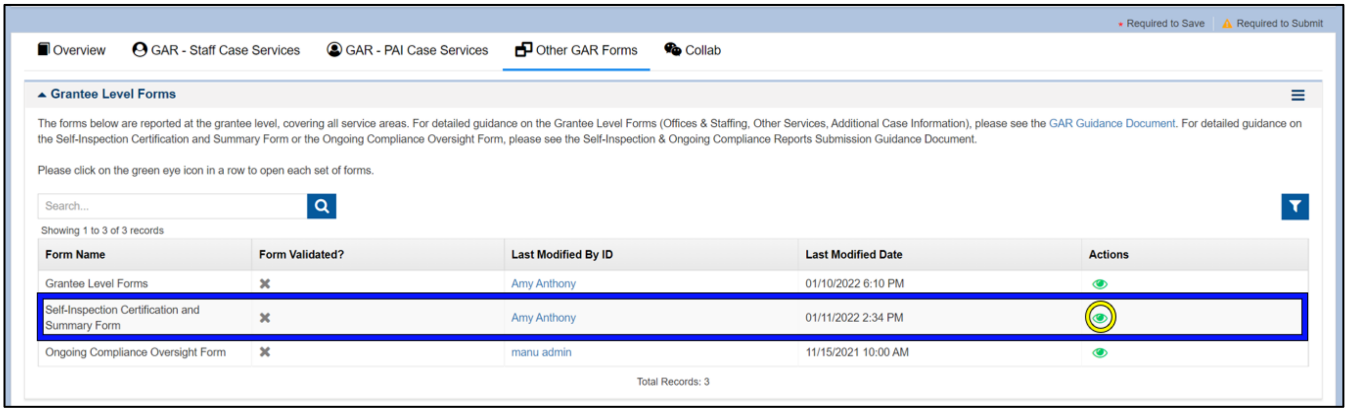


Figure 2: Image of the View Icon for the Ongoing Compliance Oversight Form on the Other GAR Forms tab

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 *Guidance for Conducting 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.

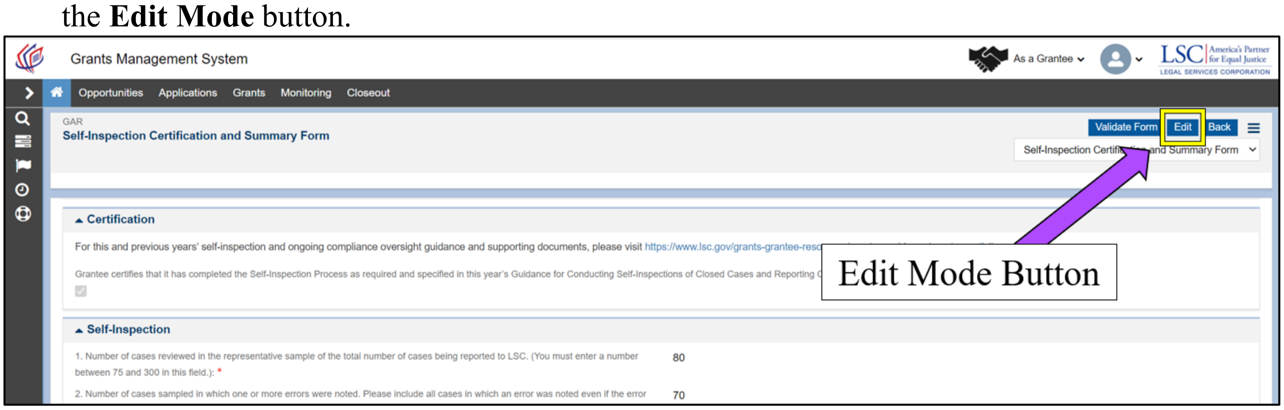


Figure 3: Image of Selecting the Edit Mode Button on the Self-Inspection Certification and Summary Form

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 [*Guidance 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***.

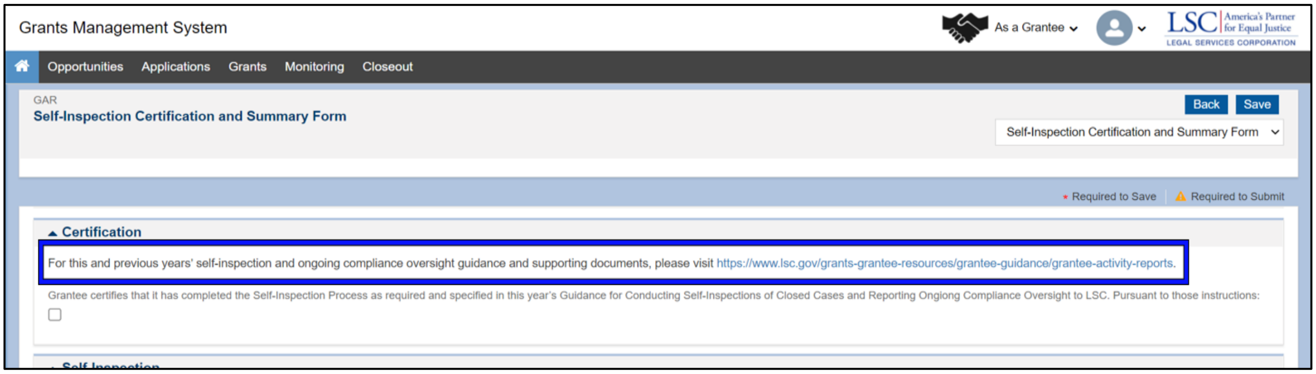


Figure 4: Image of the Editable Self-Inspection Certification and Summary Form and Link to LSC Webpage with Guidance Documents

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).

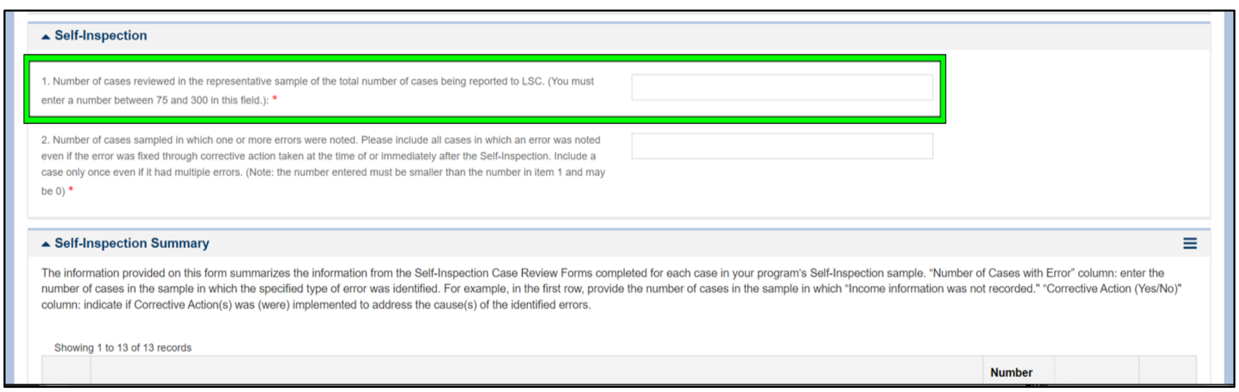


Figure 5: Image of Question 1 on the Self-Inspection Certification and Summary Form

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.

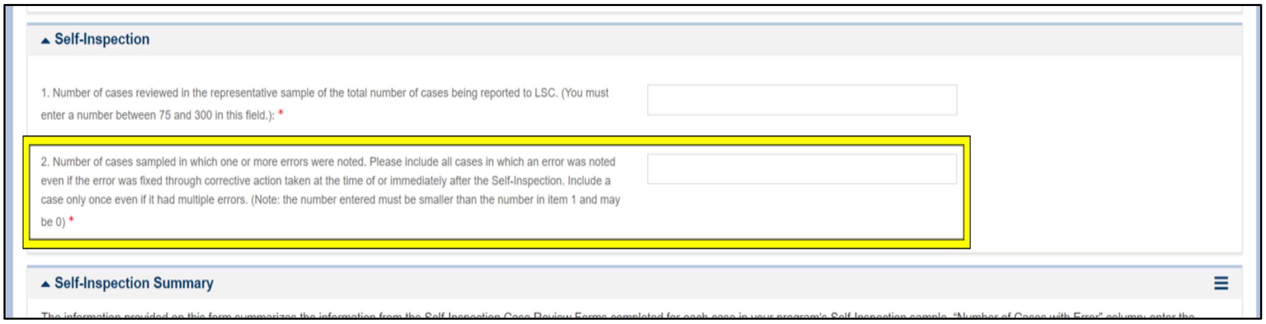


Figure 6: Image of Question 2 on the Self-Inspection Certification and Summary Form

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.

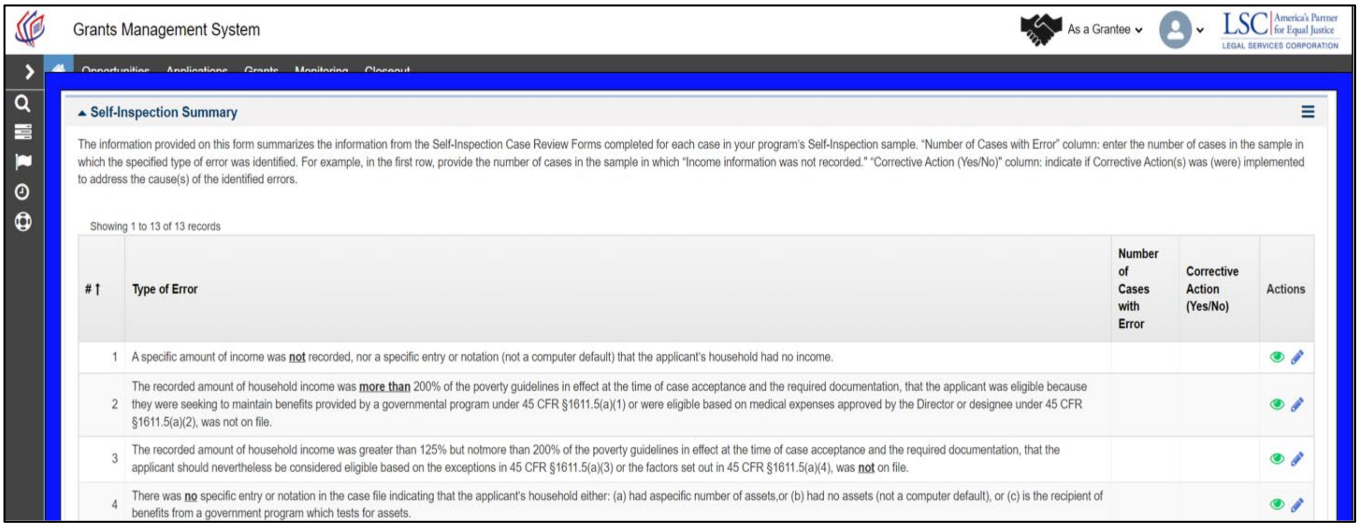


Figure 7: Image of Self-Inspection Summary Table

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

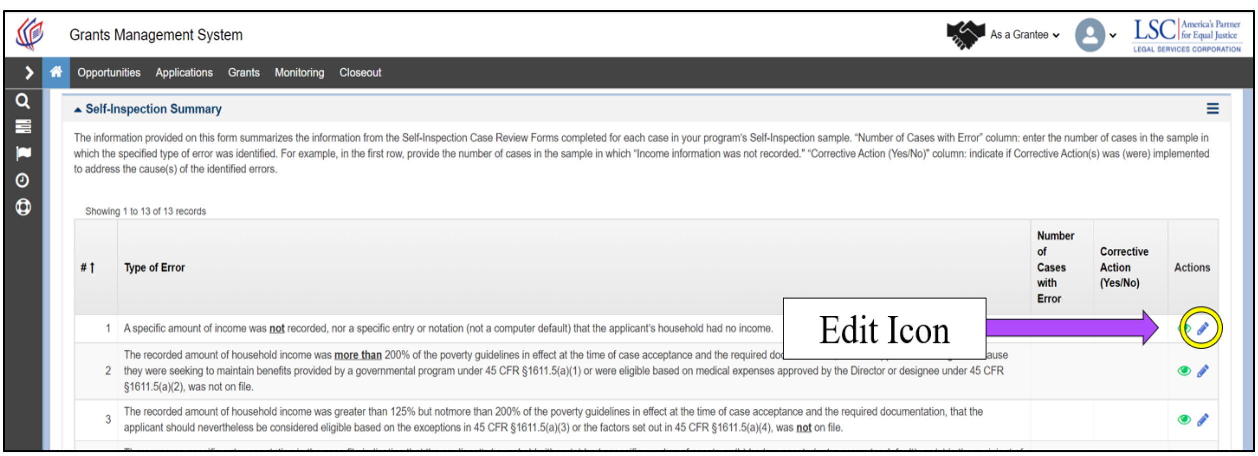


Figure 8: Image of the Edit Icon on the Self-Inspection Summary Section

For example, to complete the information needed for the first Type of Error, “A specific amount of income was **not** 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.

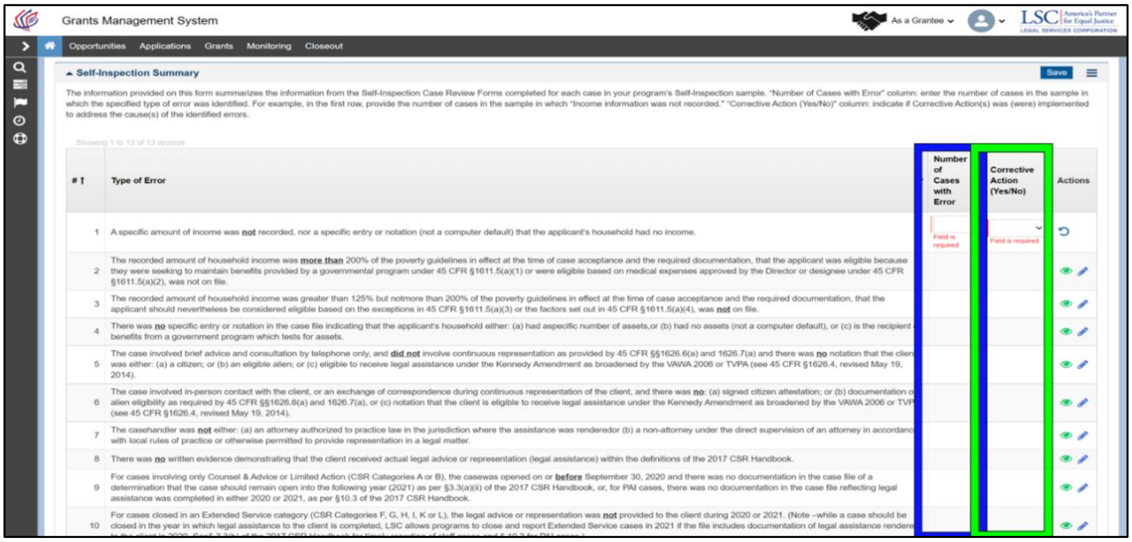


Figure 9: Image of Data Entry Columns on the Self-Inspection Summary Section

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.

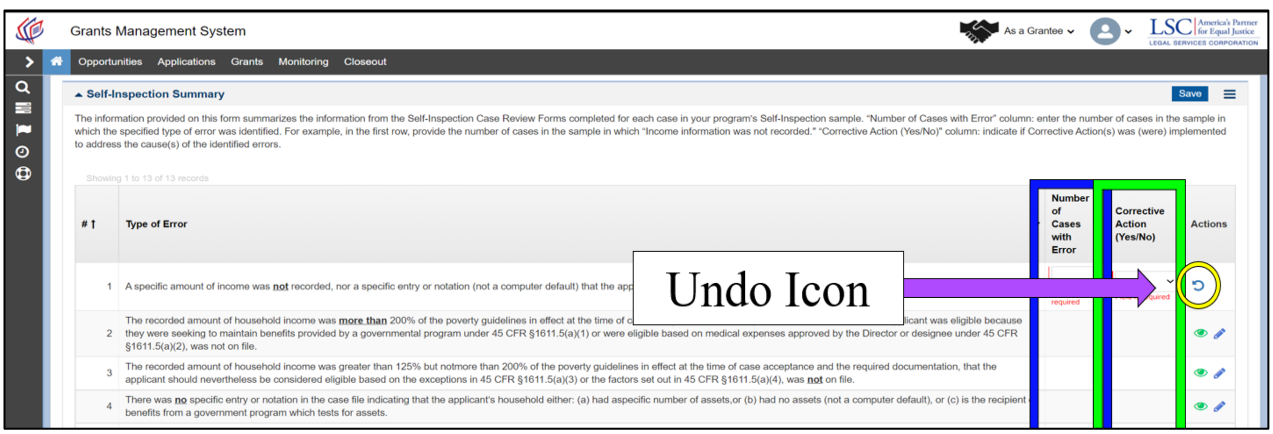


Figure 10: Image of the Undo Icon on the Self-Inspection Summary Section

Users must enter a number for **every column** even if it is “0”.

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

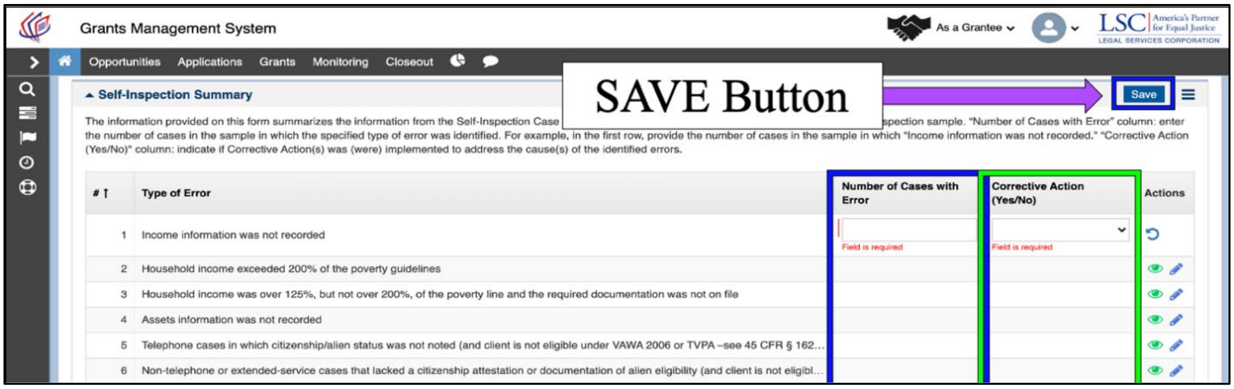


Figure 11: Image of the Save Button on the Self-Inspection Summary Section

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

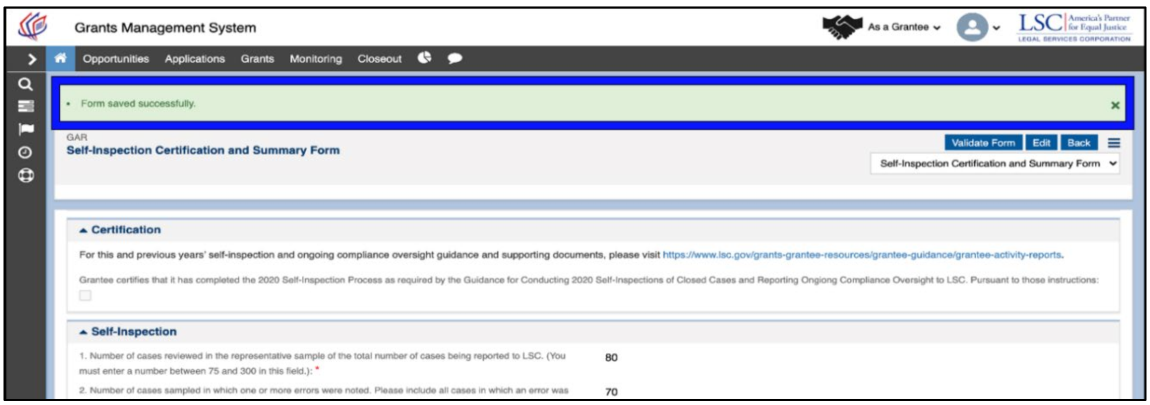


Figure 12: Image of the Successfully Saved Message on the Self-Inspection Form

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.

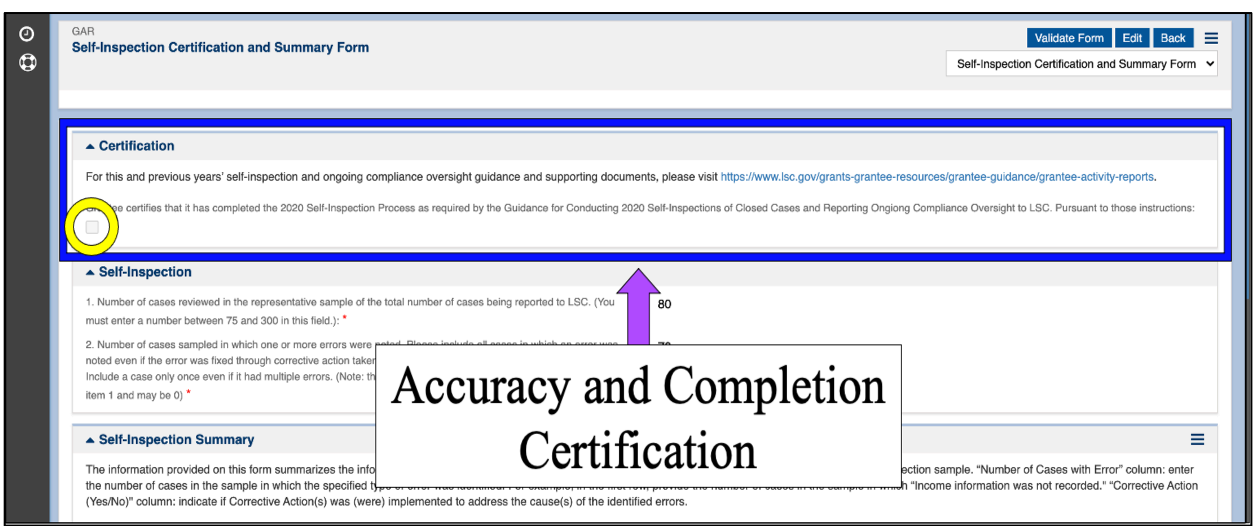


Figure 13: Image of the Accuracy & Certification Checkbox on the Completed Self-Inspection Form

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

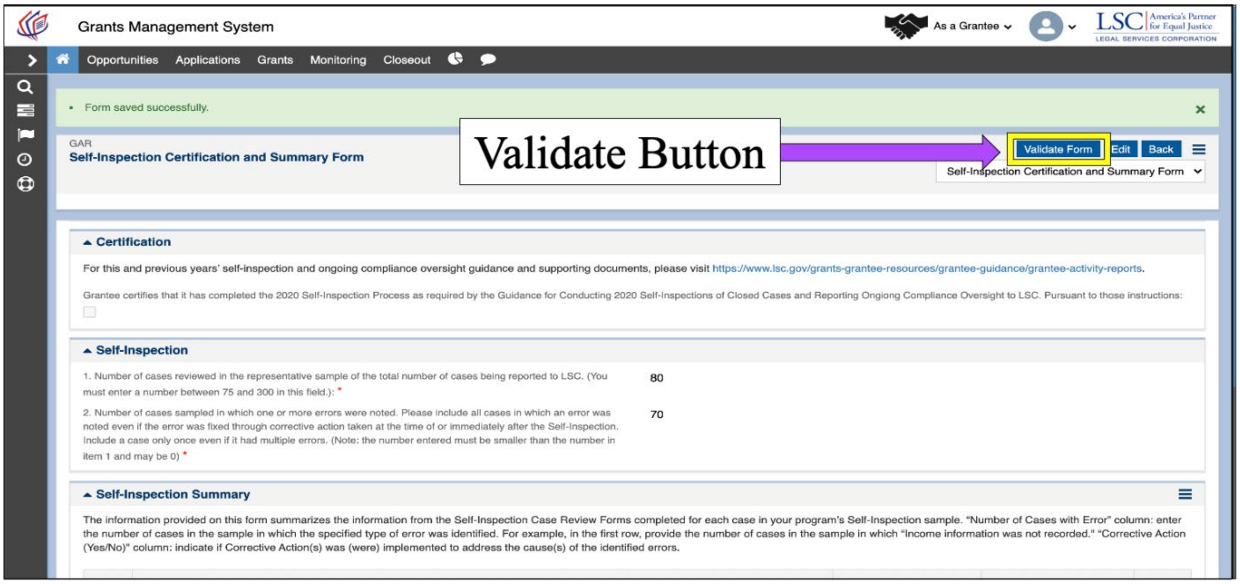


Figure 14: Image of the Validate Form Button on the Self-Inspection Certification and Summary Form

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.

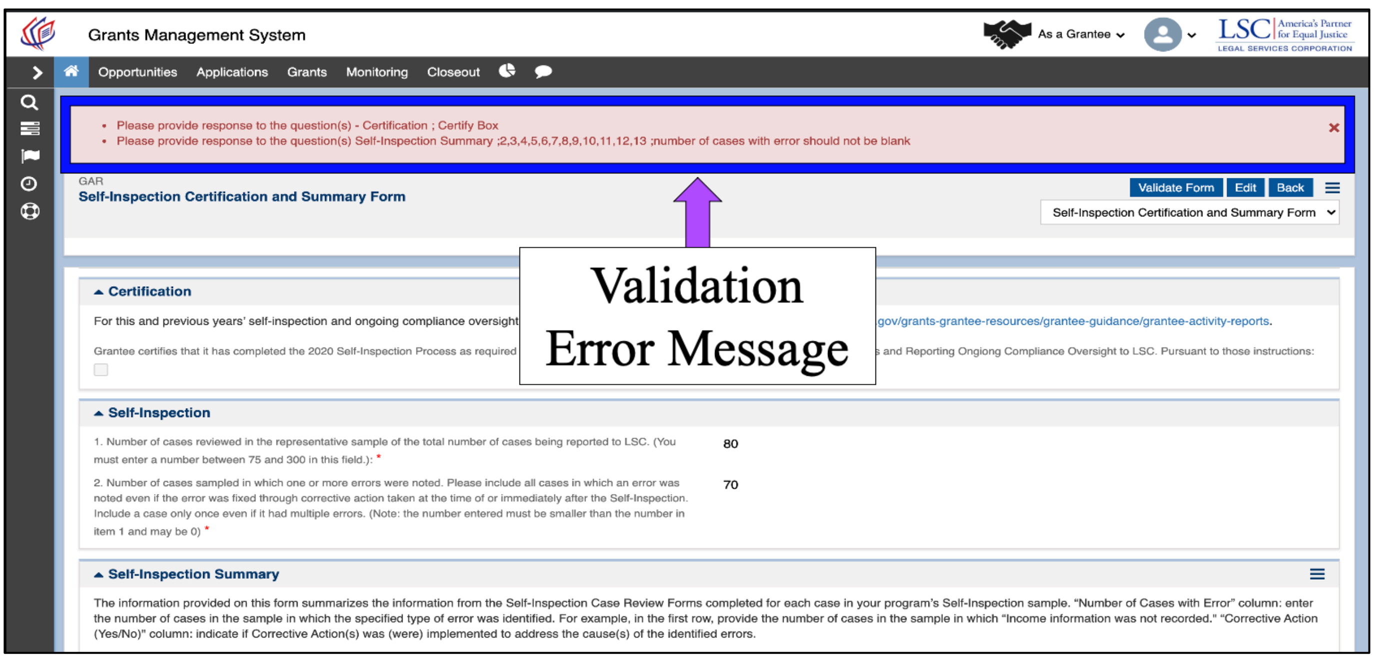


Figure 15: Image of Validation Error Messages from the Self-Inspection Certification and Summary Form

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.

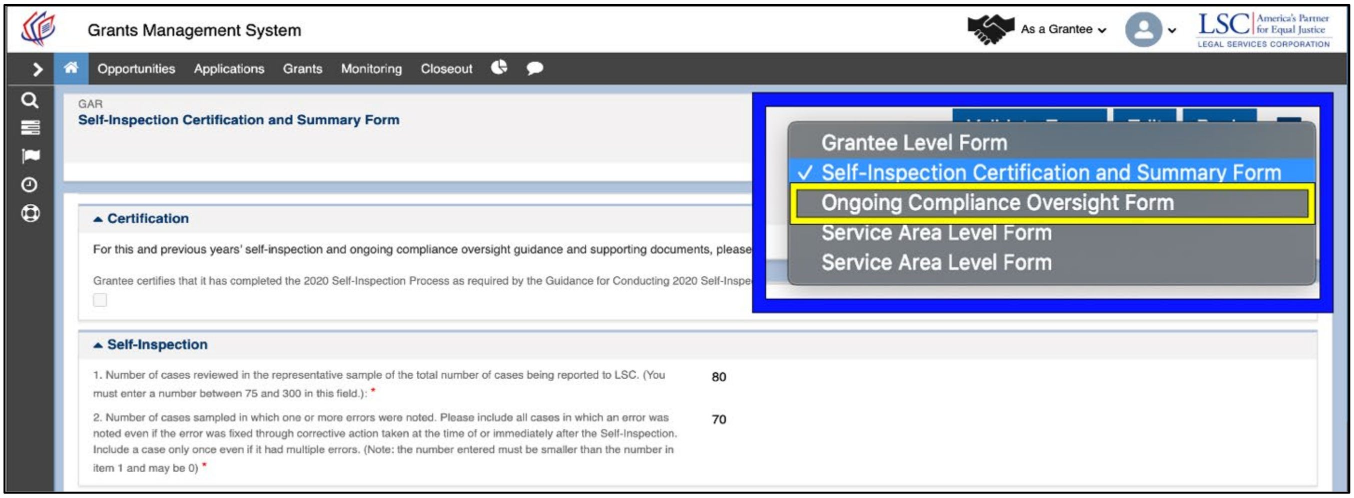


Figure 16: Image of Navigating to the Ongoing Compliance Oversight Form from the Dropdown Menu

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 *Guidance for Conducting 2021 Self-Inspection of Closed Cases and Reporting Ongoing Compliance Oversight to LSC* which is also linked on the LSC.gov webpage in the Certification section of this page in ***GrantEase***.

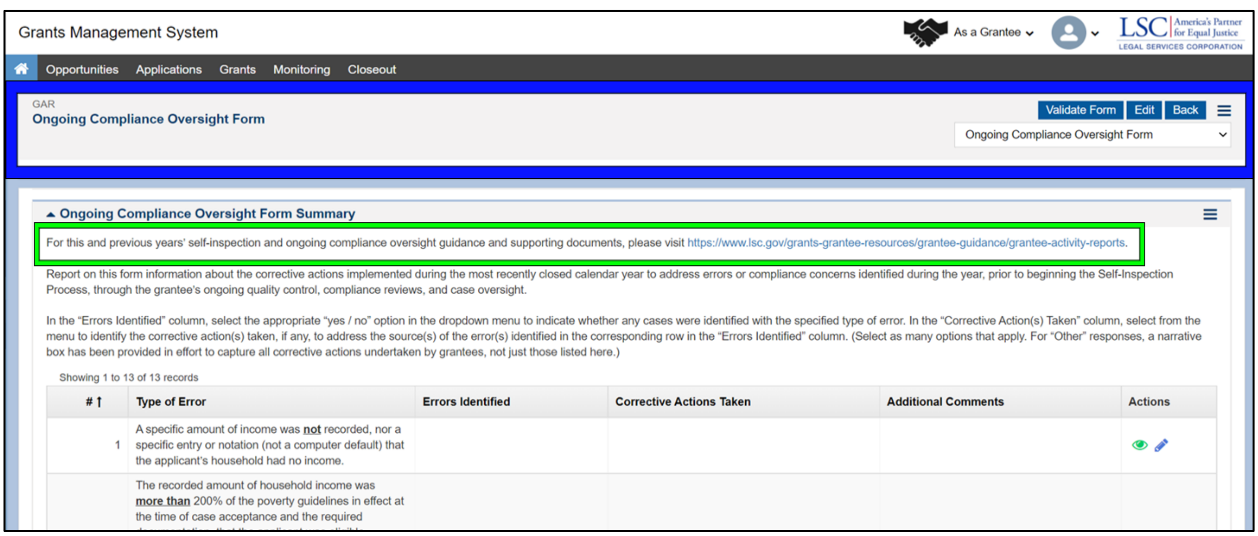


Figure 17: Image of the LSC.gov Webpage That Links to Current Guidance Documents for the Ongoing Compliance Oversight Form

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 if there were **NO** errors identified*.

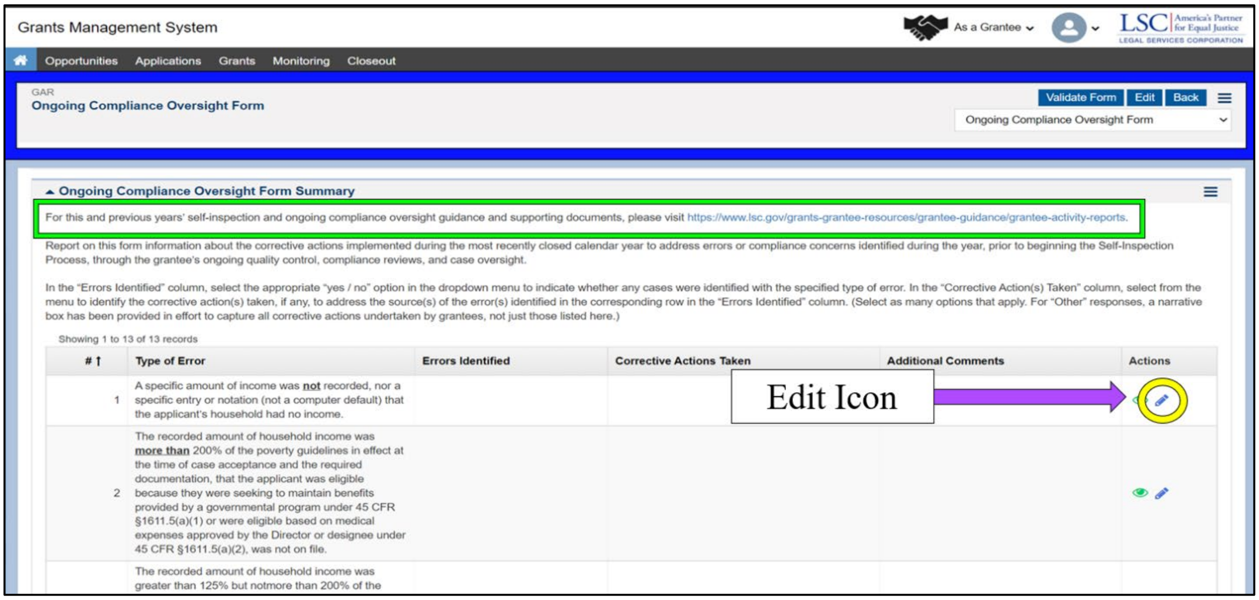


Figure 18: Image of the Edit Icon on the Ongoing Compliance Oversight Form

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

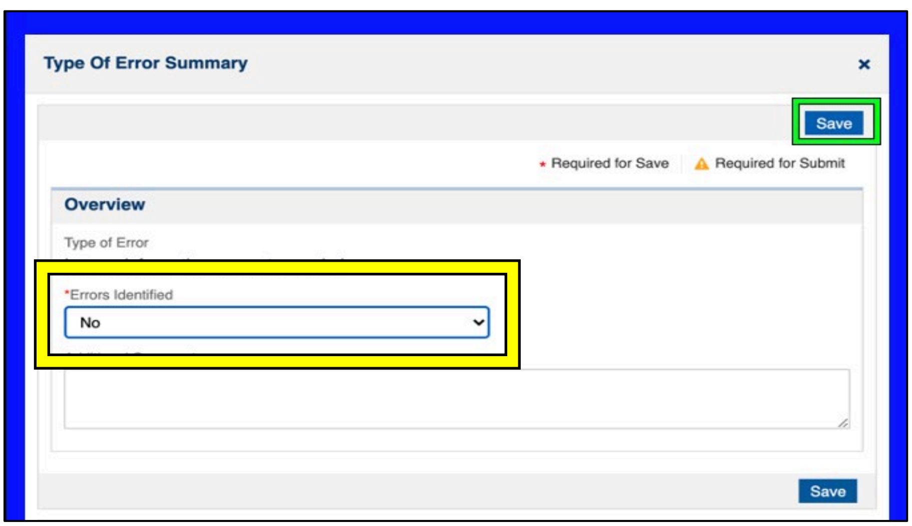


Figure 19: Image of the Data Entry Pop-up Screen and Selecting "No"

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

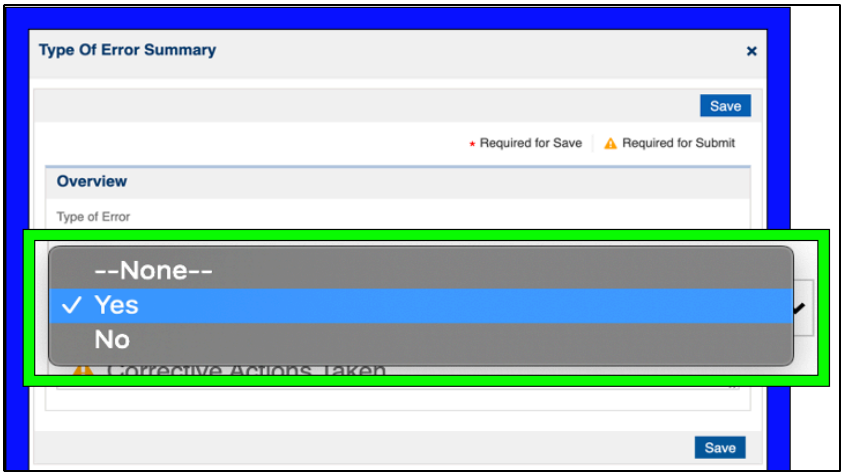


Figure 20: Image of the Data Entry Pop-up Screen and Selecting "Yes"

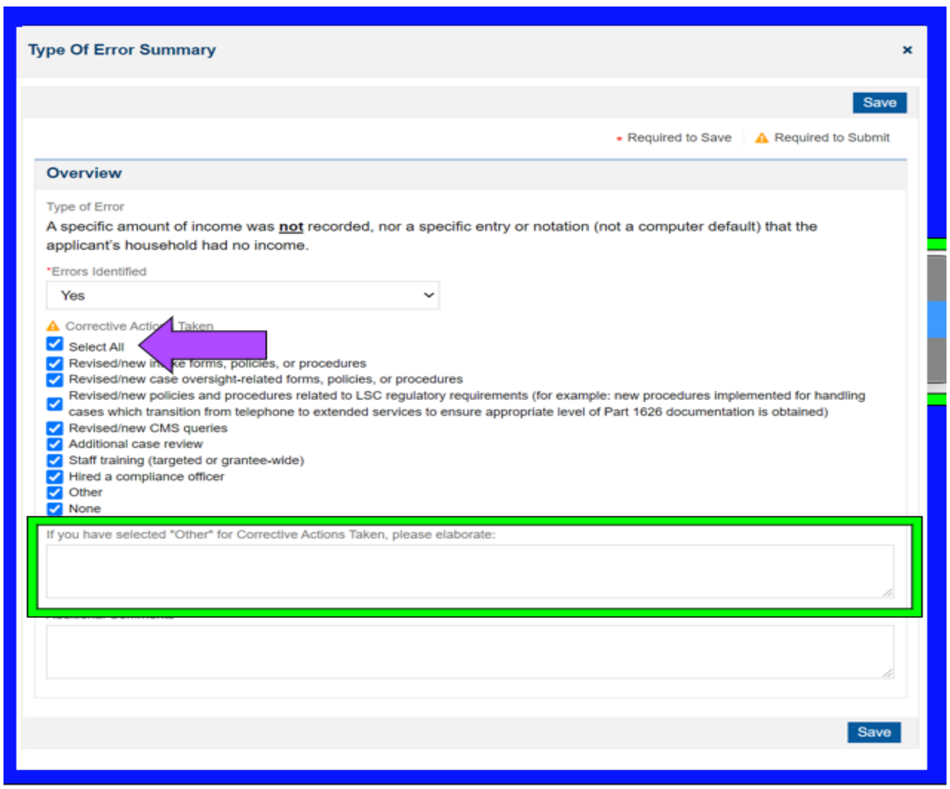


Figure 21: Image of Corrective Actions List That Appears on the Pop-up Screen after Selecting "Yes"

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.

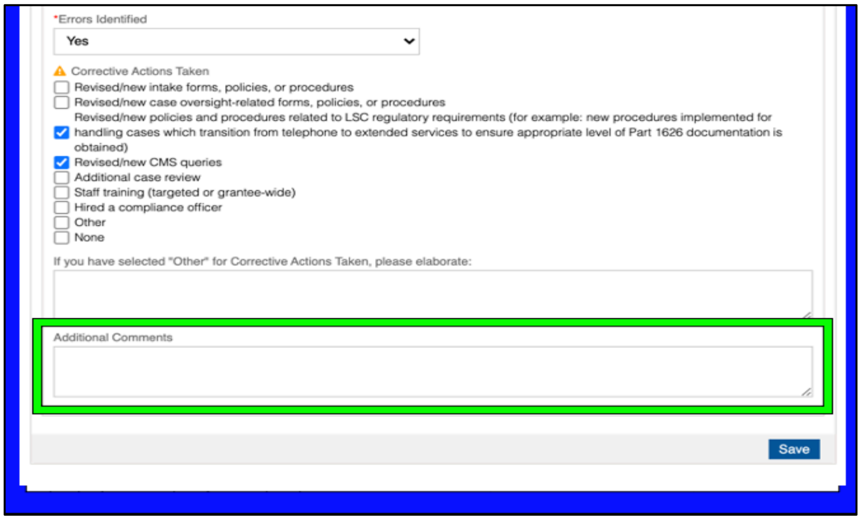


Figure 22: Image of the Additional Comments Box on the Data Entry Pop-up Screen

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.

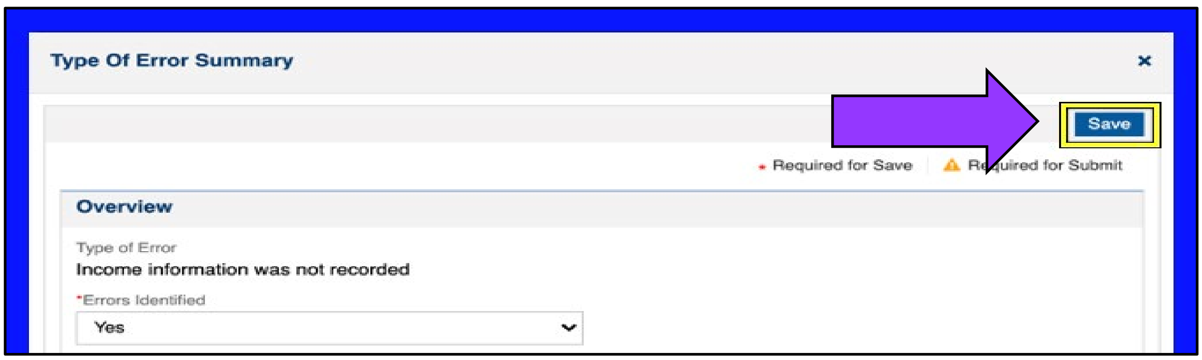


Figure 23: Image of the Save Button on the Data Entry Pop-up Screen

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.

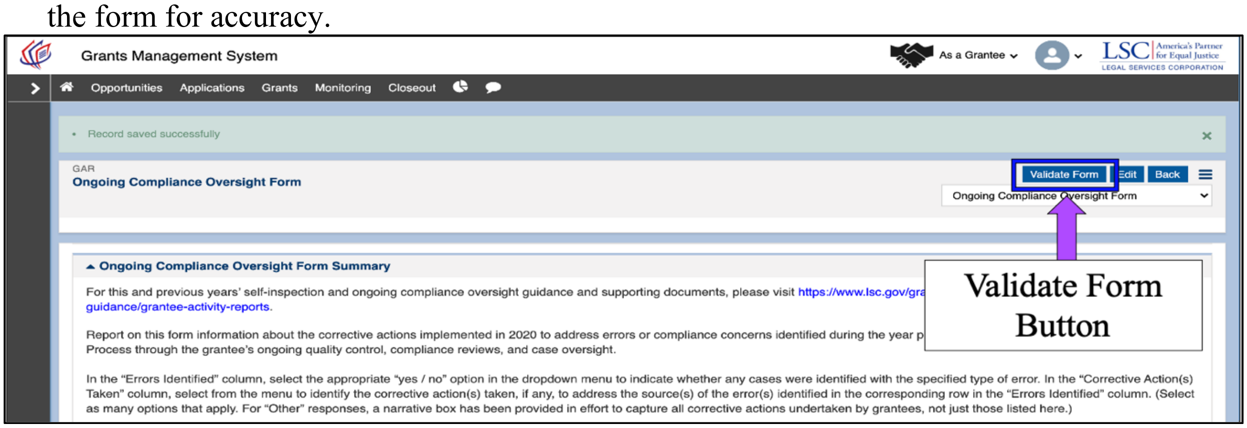


Figure 24: Image of the Validate Form Button on the Completed Ongoing Compliance Oversight Form

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.

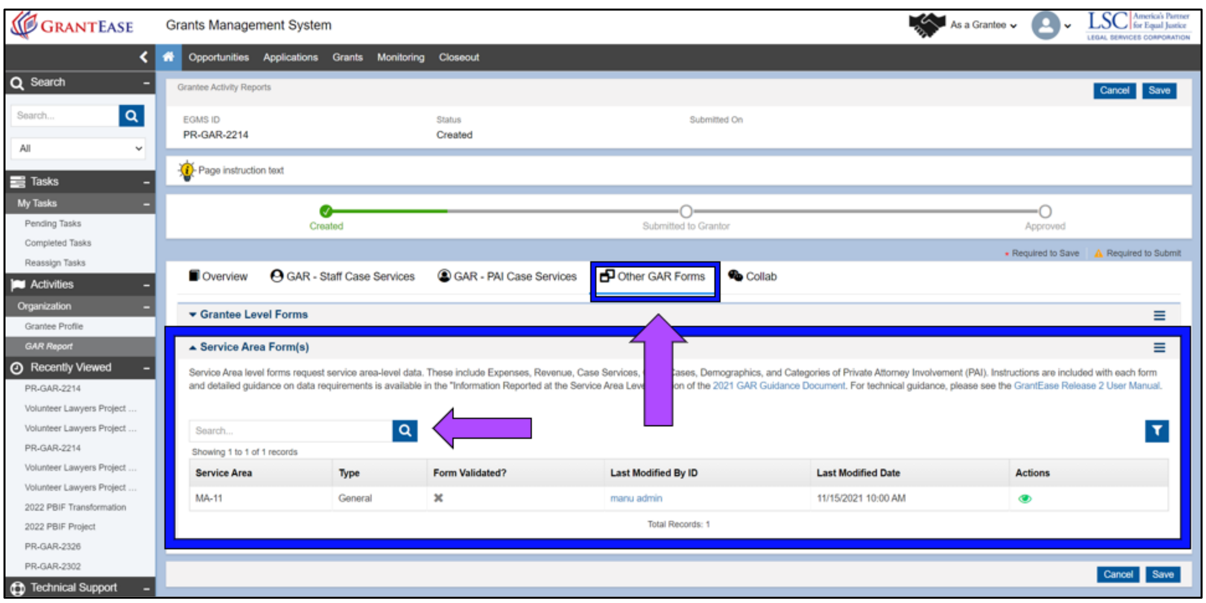


Figure 1: Image of the GAR Forms Tab and the Associated Service Areas

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.

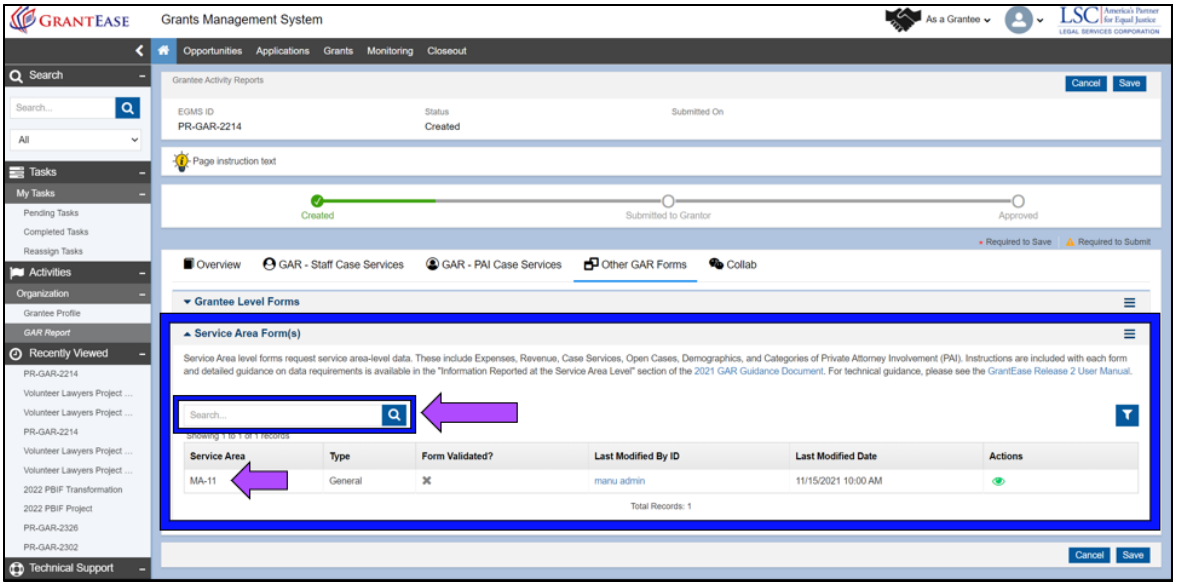


Figure 2: Image of Search Box for Service Areas

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

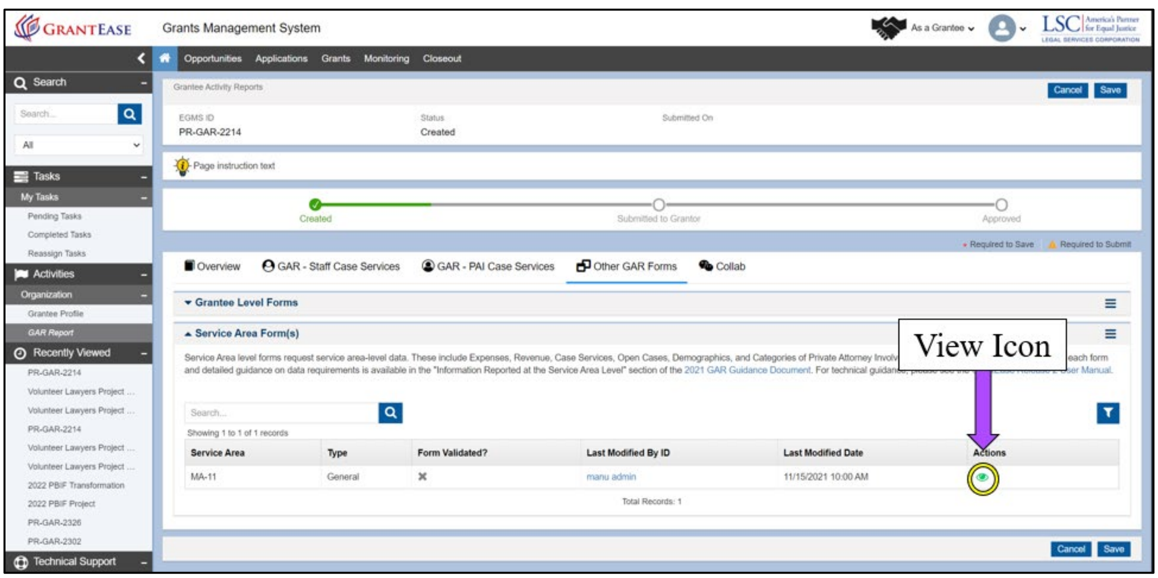


Figure 3: Image of the View Icon for a Service Area

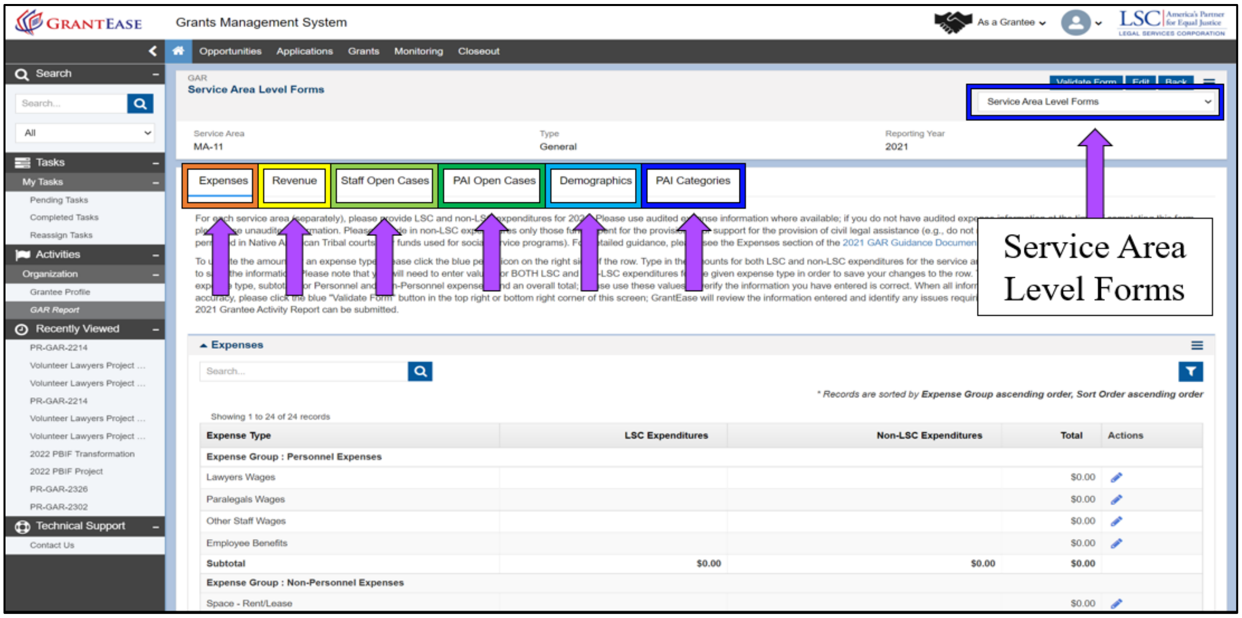


Figure 4: Image of the Navigation Dropdown box and Each Service Area Level Form

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 **ALL** 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**.

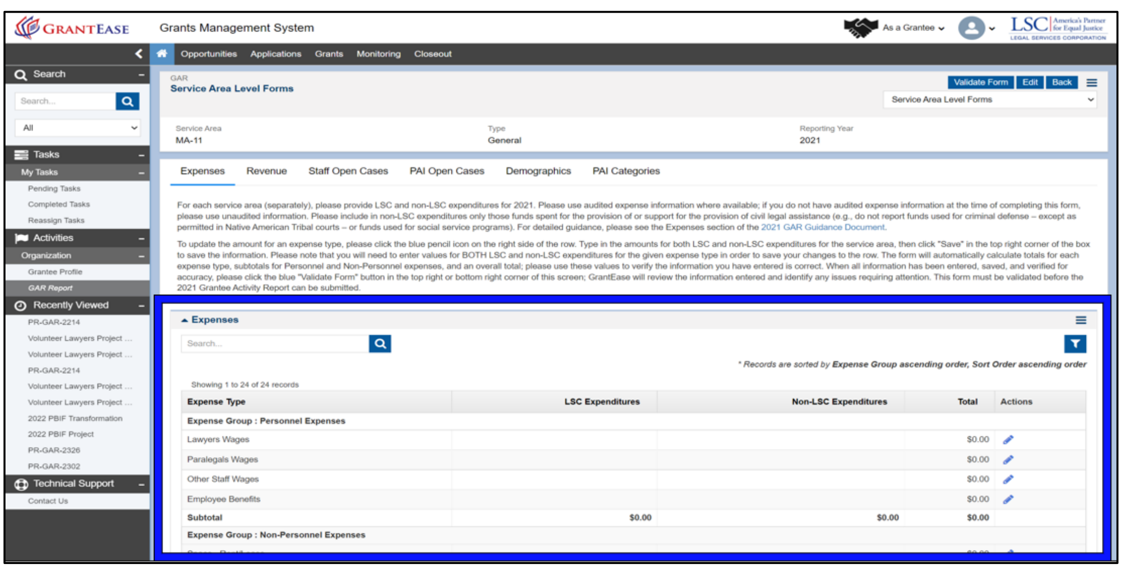


Figure 5: Image of the Personnel Expenses, Non-Personnel Expenses Table of the Service Area Level - Expenses Form

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.

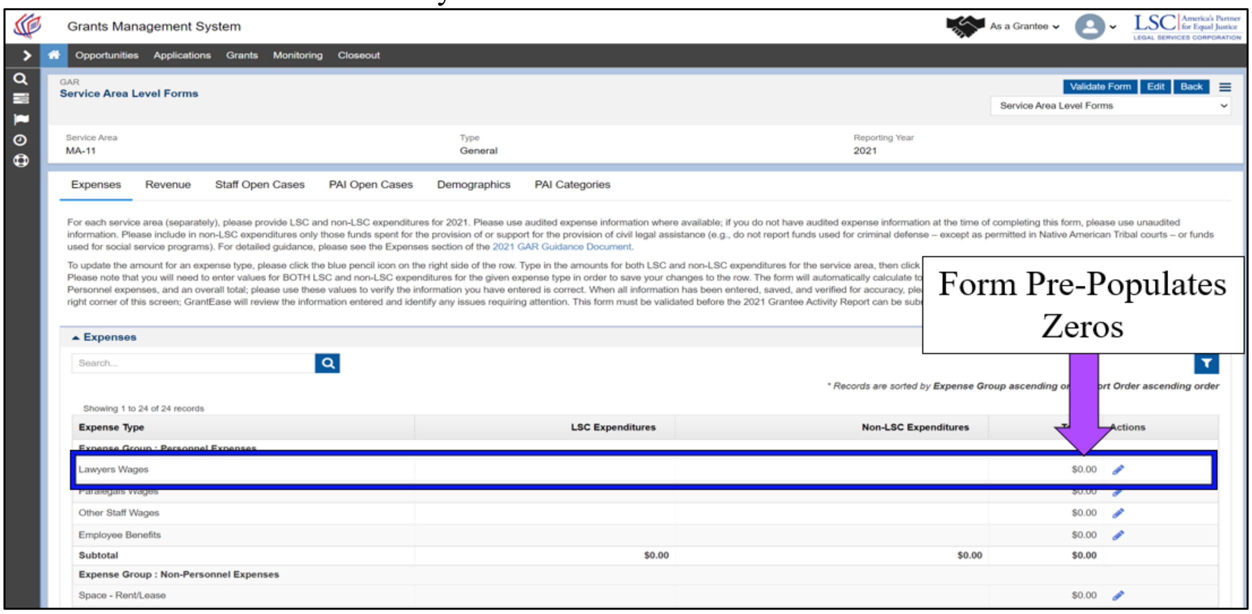


Figure 6: Image of the Pre-populated Zeros on the Expenses Form

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

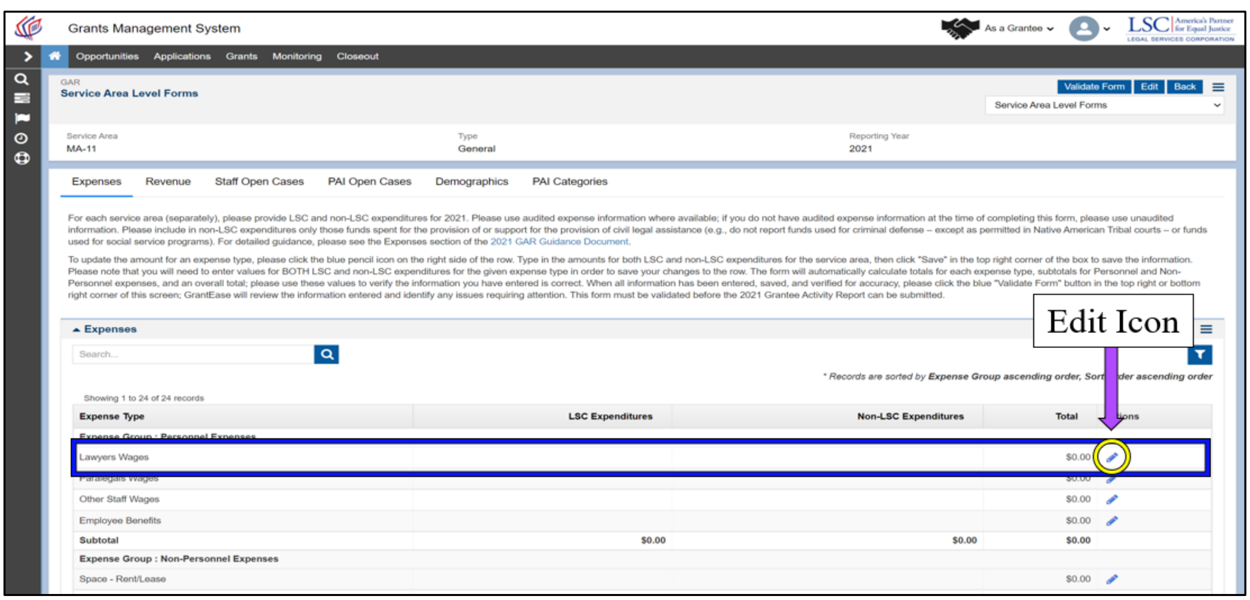


Figure 7: Image of Using the Edit Icon to Enter Data for an Expenditure

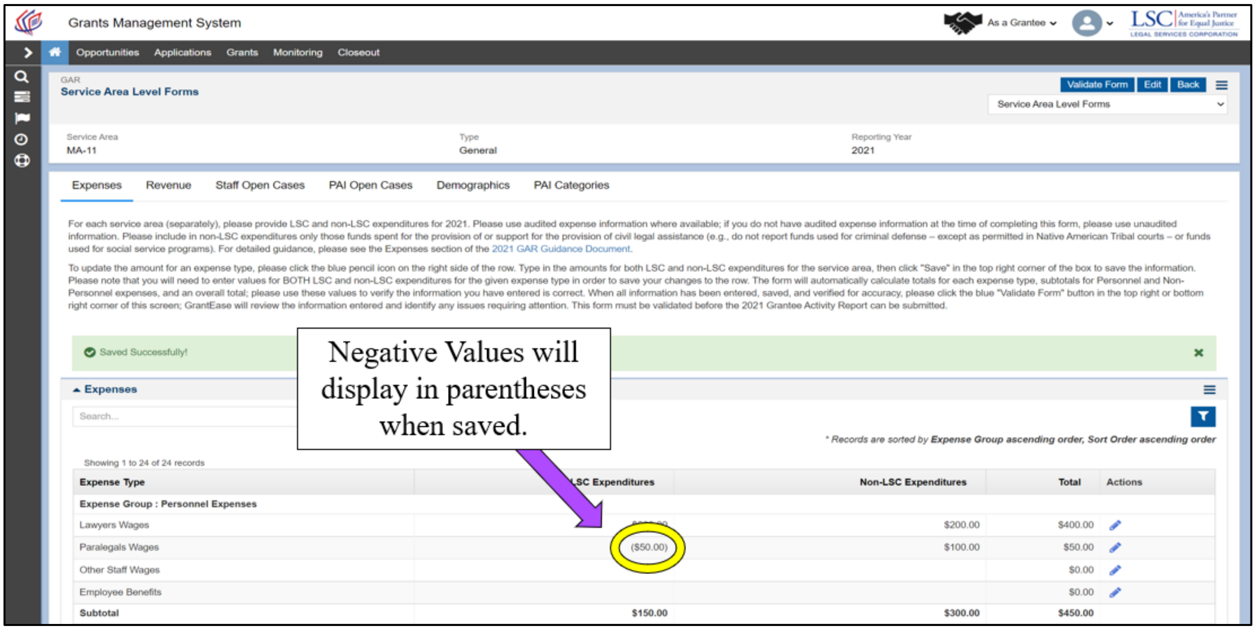


Figure 8: Image of Successfully Saved Data and Negative Values Displaying in Parentheses

Here, unlike other fields, negative values are acceptable.

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

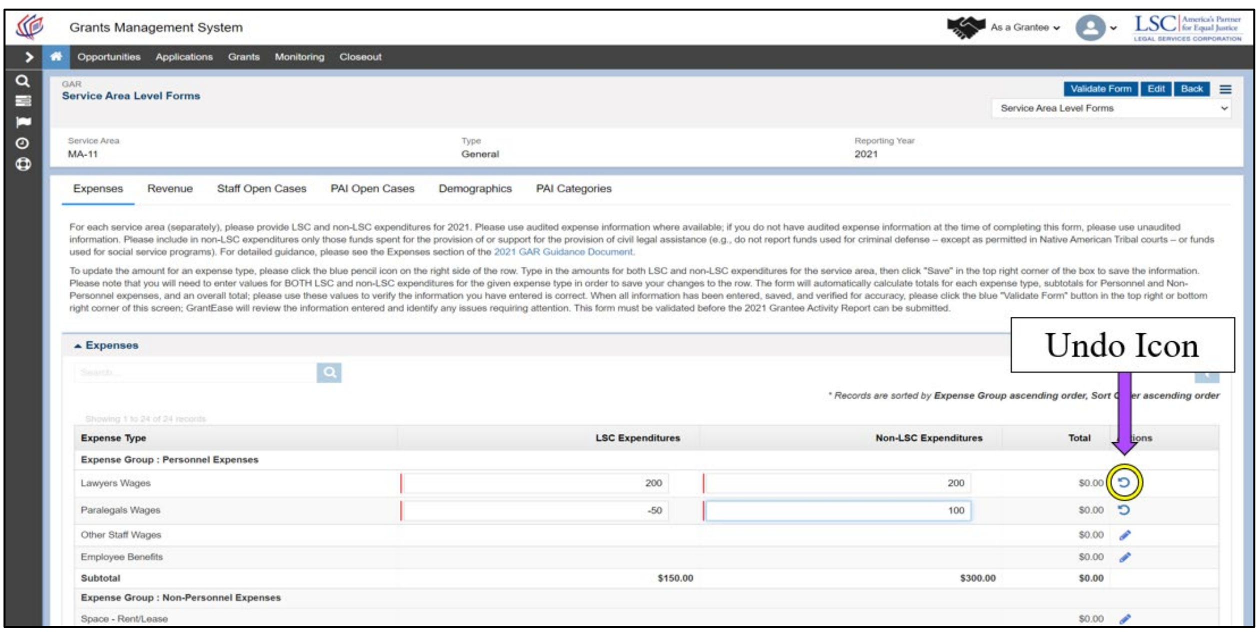


Figure 9: Image of Removing Data from a Field

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.

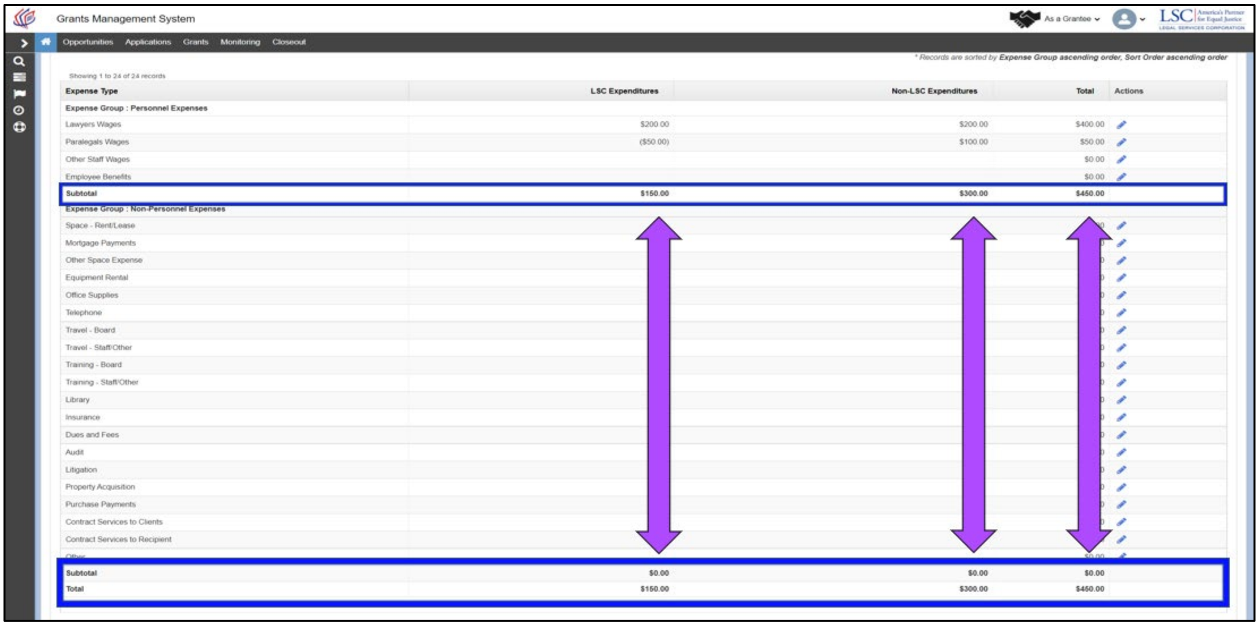


Figure 10: Image of the Subtotals & Totals for the Expenses Form of the Service Area Level Forms

Service Area Form(s) Revenue

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

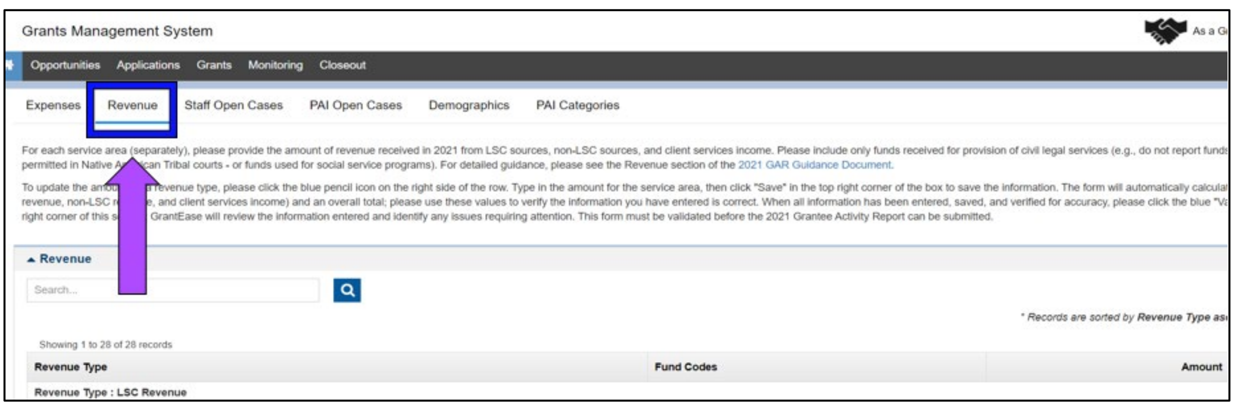


Figure 11: Image of the Service Area Level - Revenue Form

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

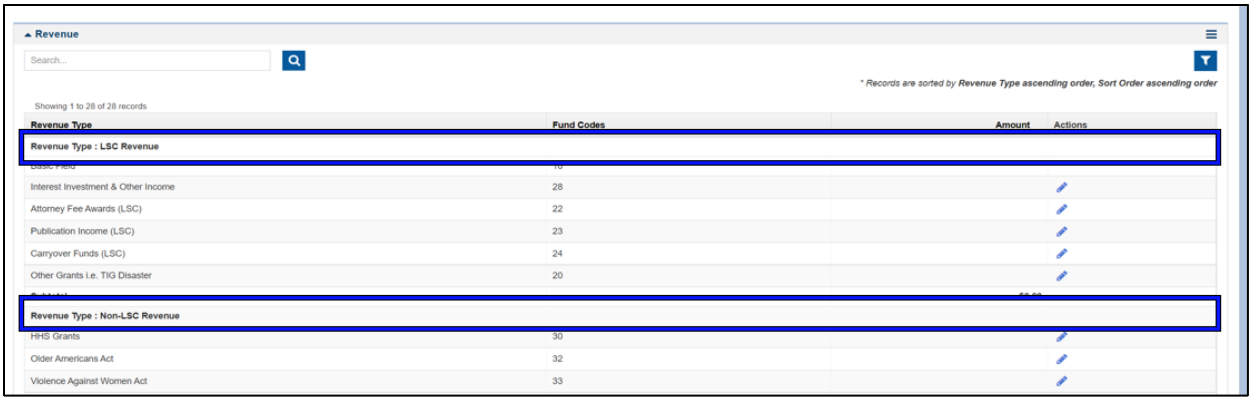


Figure 12: Image of the Sections of the Service Area Level – Revenue Form

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.

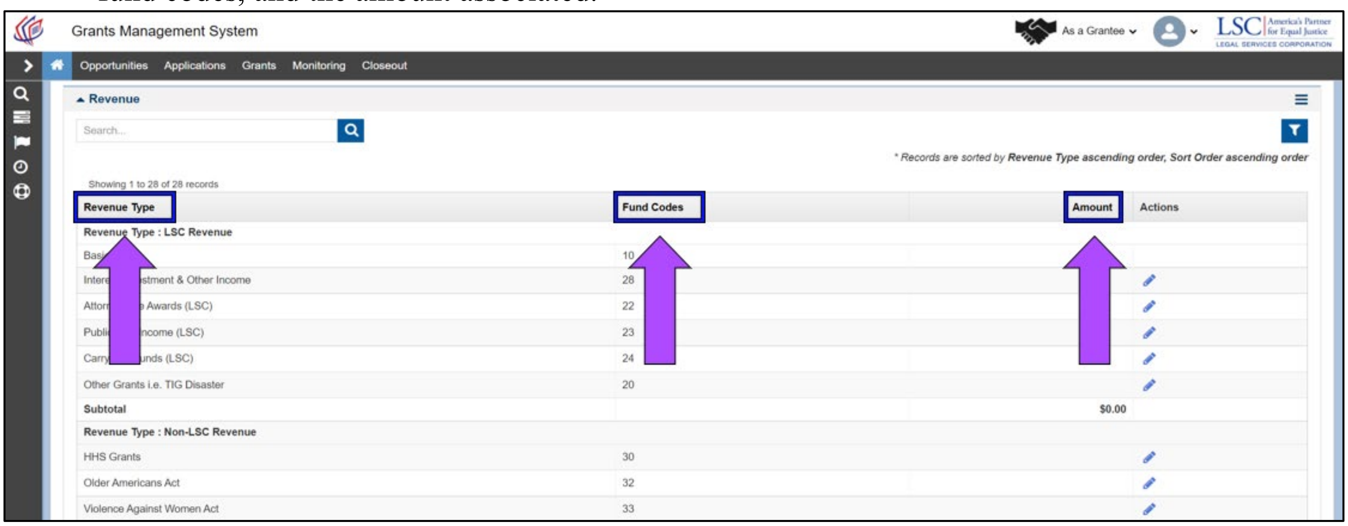


Figure 13: Image of the Data Entry Columns for LSC Revenue

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

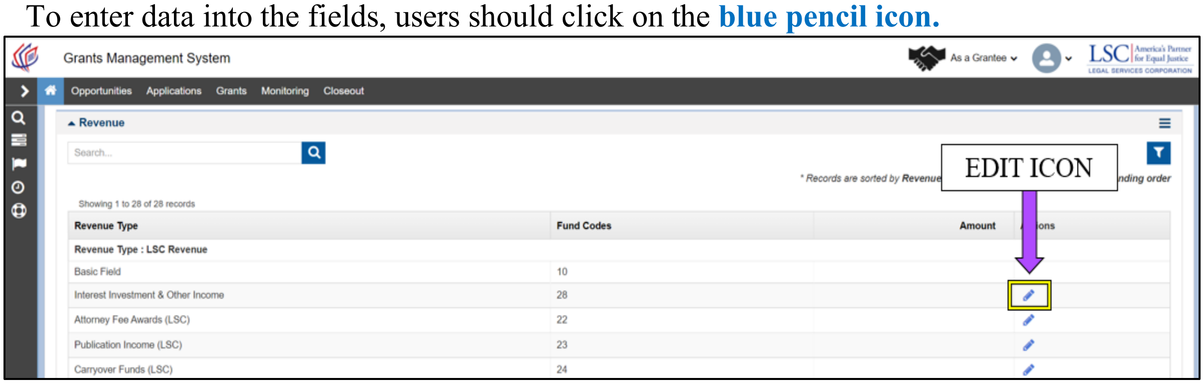


Figure 14: Image of Selecting the Edit Icon on a Revenue Type on the Service Area Level Form

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.)

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

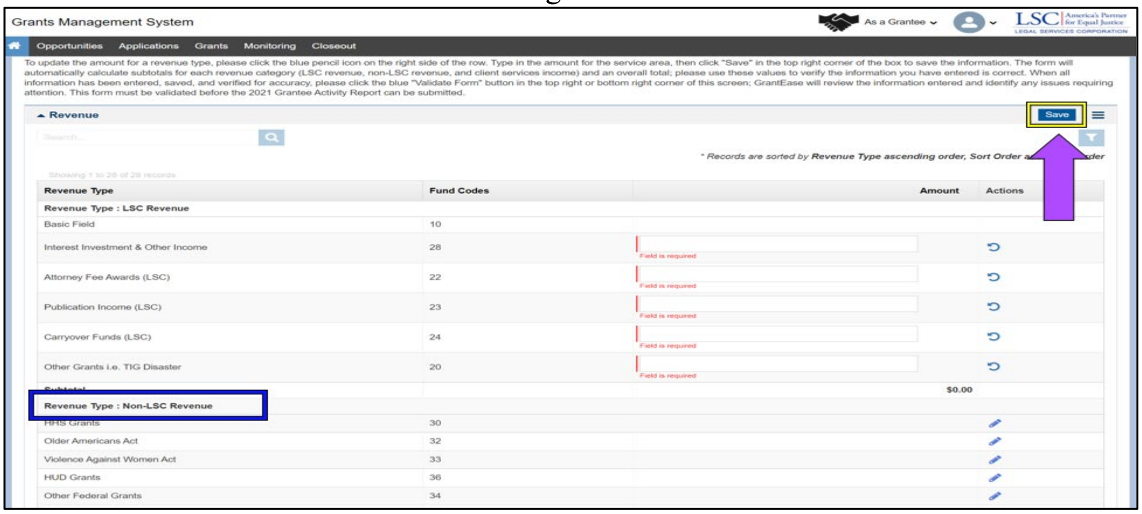


Figure 15: Image of Saving a Section of the Revenue Form and a Highlighted Next Section

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.

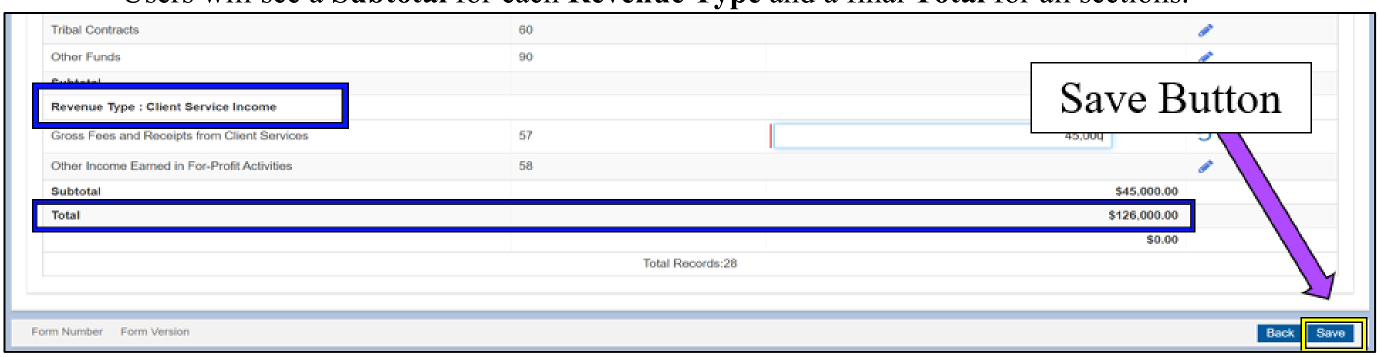


Figure 16: Image of Selecting the Save Button on the Revenue Form in Service Area Forms

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.

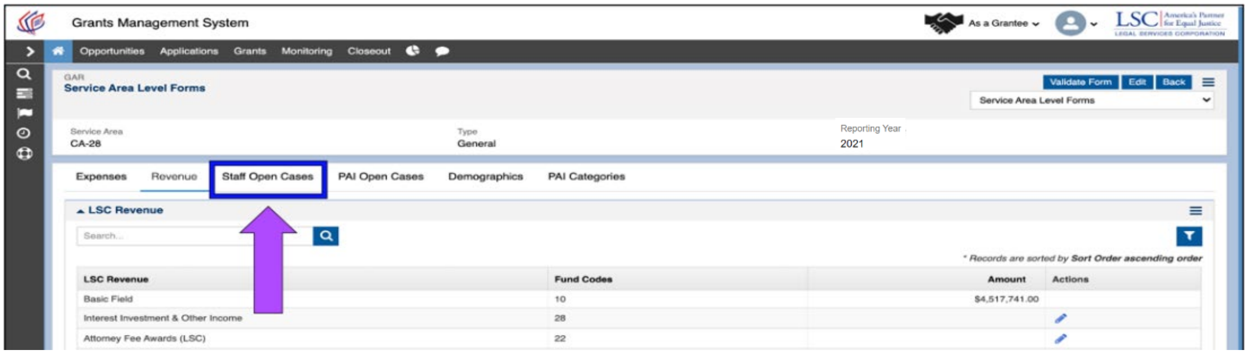


Figure 17: Image of the Navigating to the Service Area Level - Staff Open Cases Form

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.

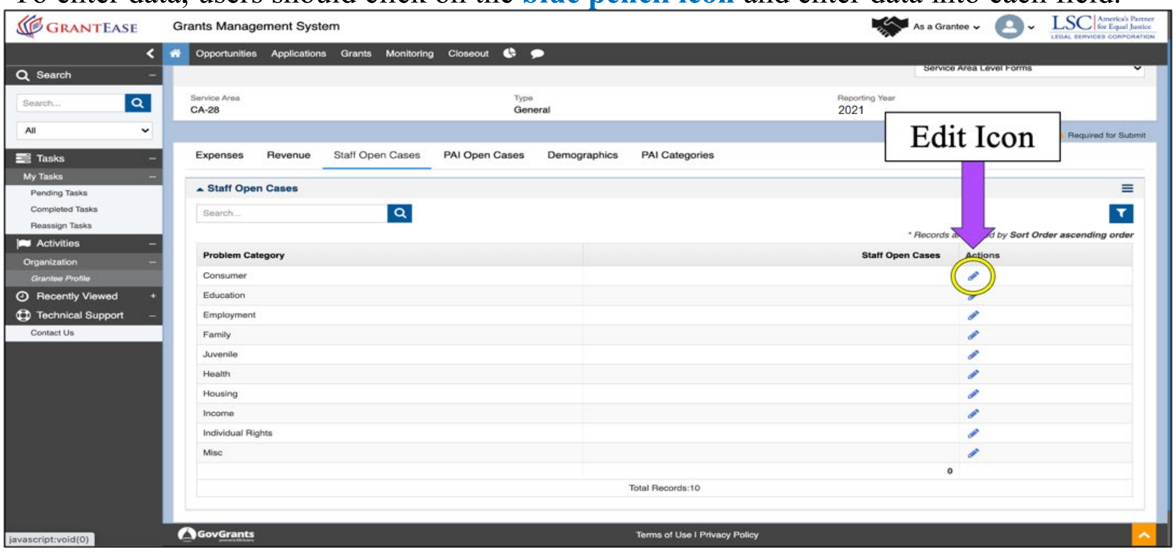


Figure 18: Image of the Edit Icon for the Staff Open Cases Form

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.

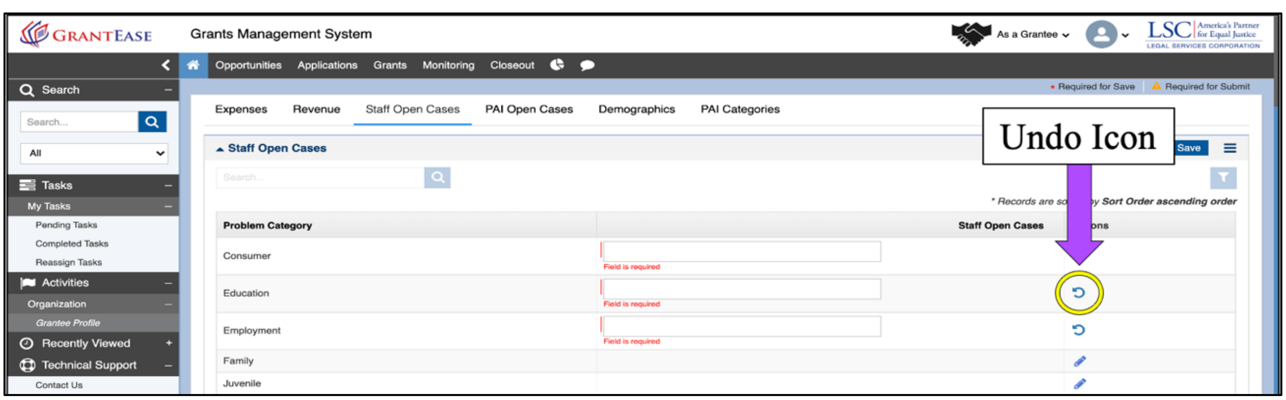


Figure 19: Image of Removing Data Entries from the Form Using the Undo Icon

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

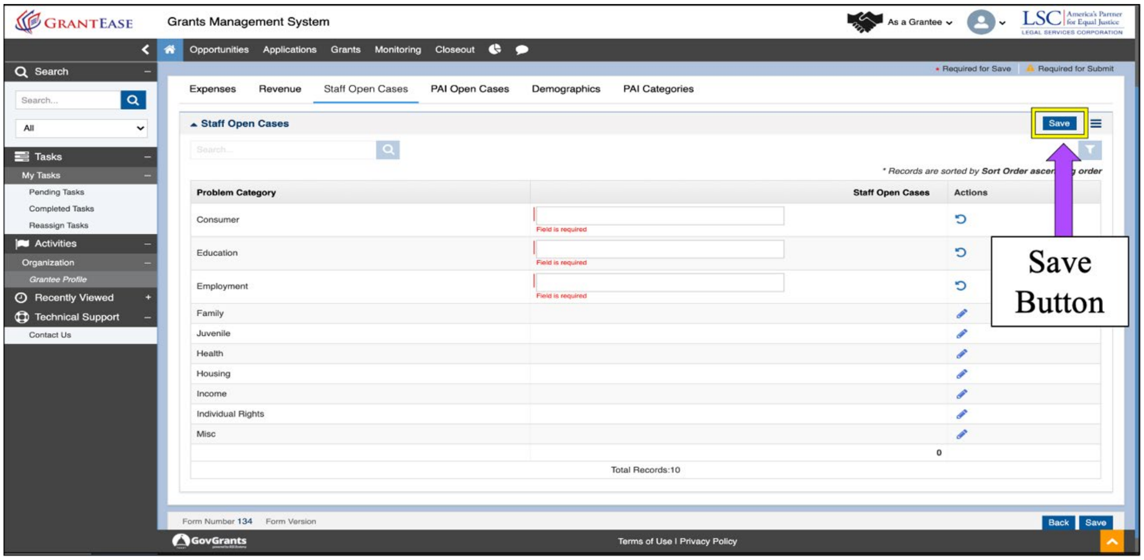


Figure 20: Image of Selecting the Save Button on the Staff Open Cases Form

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.

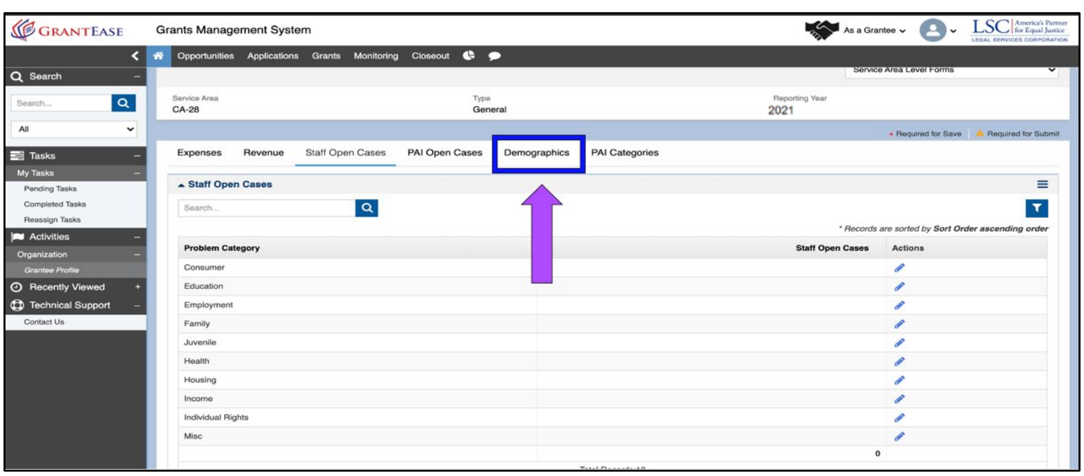


Figure 21: Image of Navigating to the Demographics Tab

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.

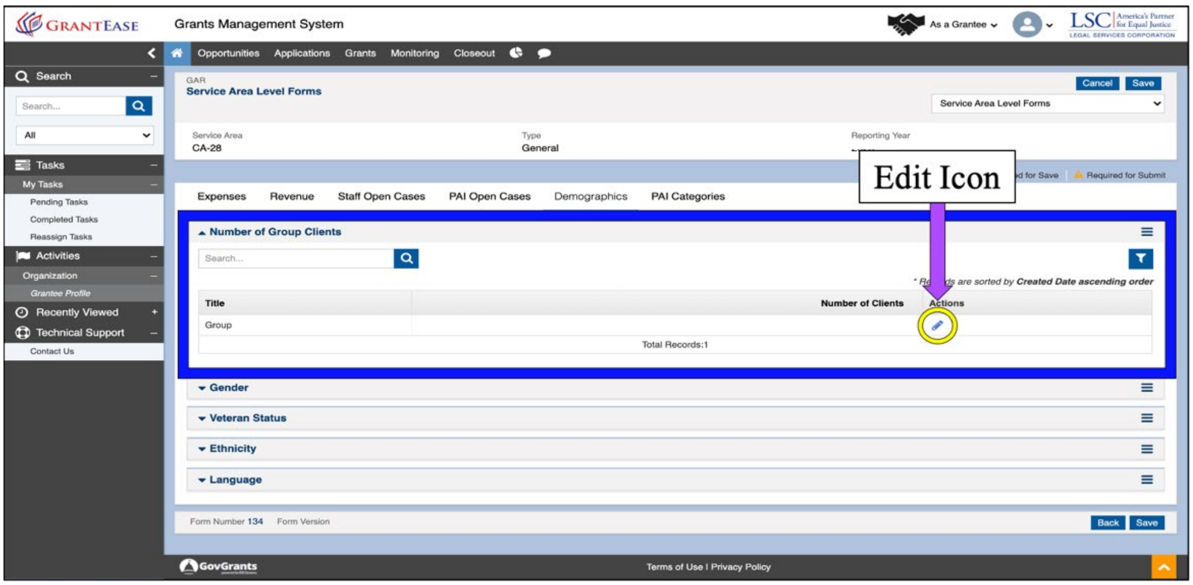


Figure 22: Image of Selecting the Edit Icon for the "Number of Group Clients" Section

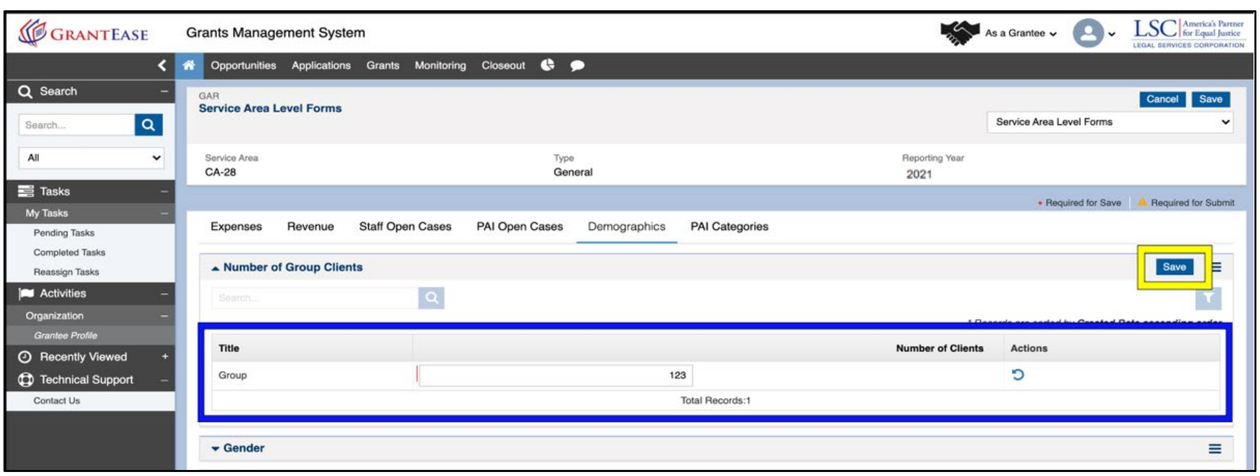


Figure 23: Image of Entering Data in Edit Mode and Selecting the Save Button

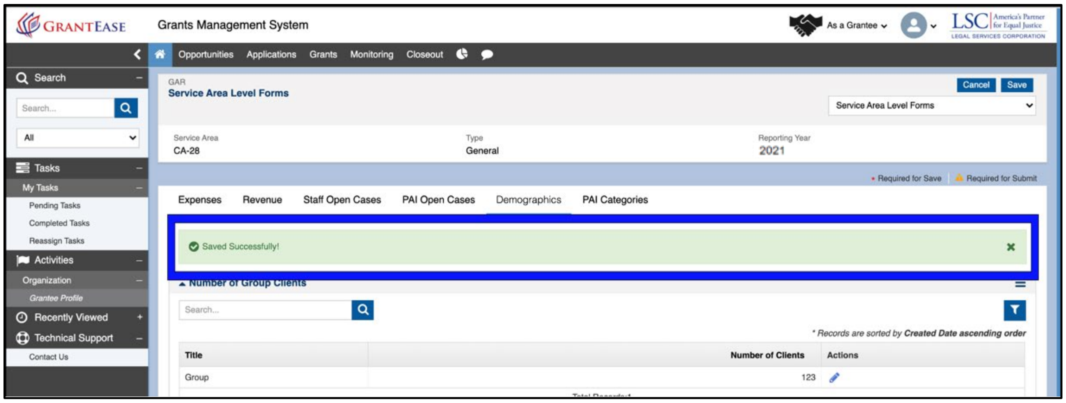


Figure 24: Image of the Successfully Saved Message

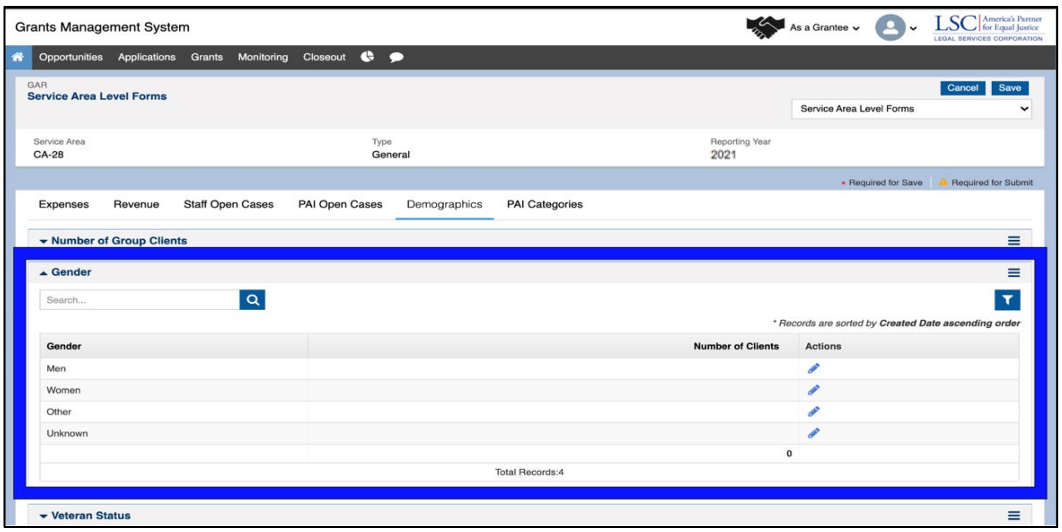


Figure 25: Image of Selecting the Gender Section of the Demographics Tab

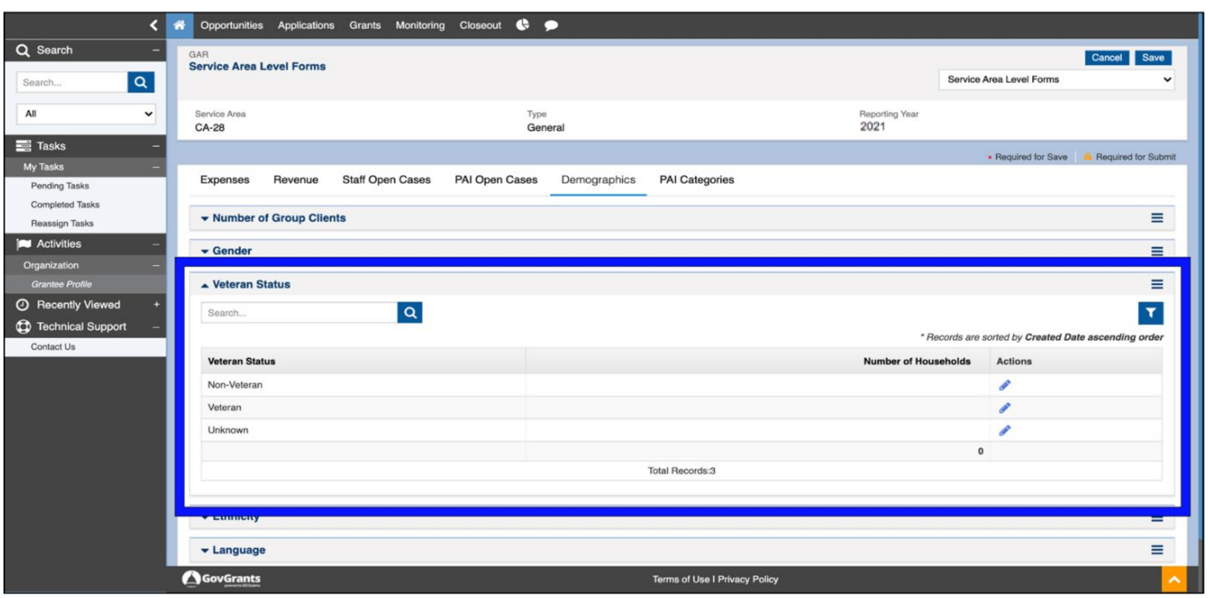


Figure 26: Image of Selecting the Veterans Status Section of the Demographics Tab

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.

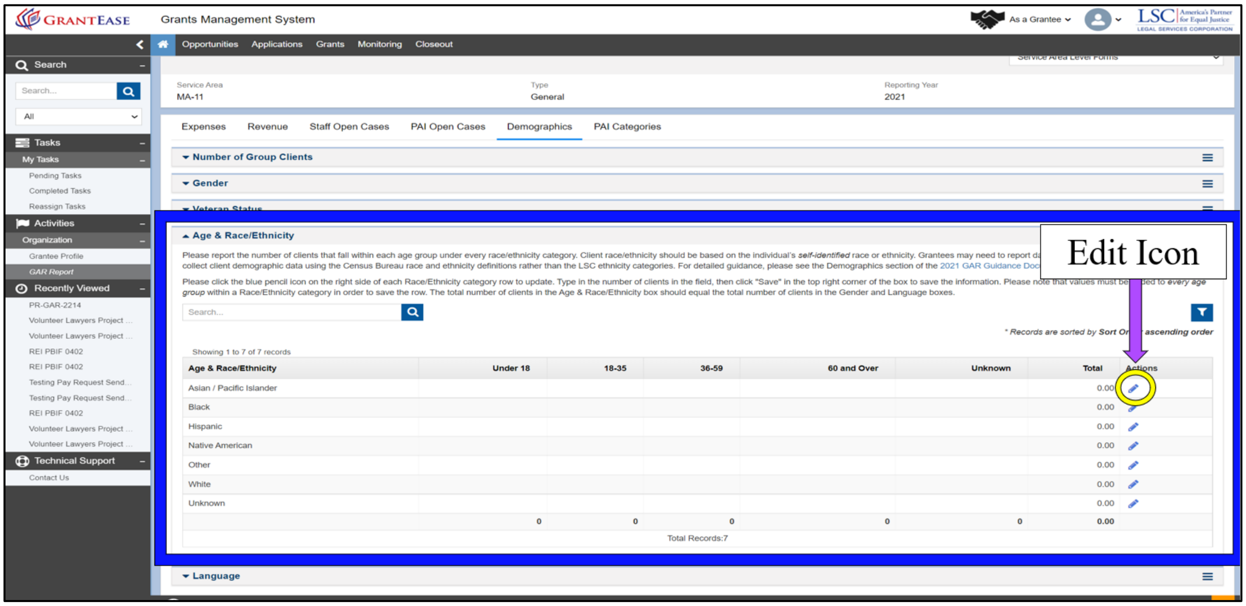


Figure 27: Image of Edit Mode for the Age & Race/Ethnicity Section of the Demographics Tab

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

Figure 28: Image of Entering Data into the Race/Ethnicity Table

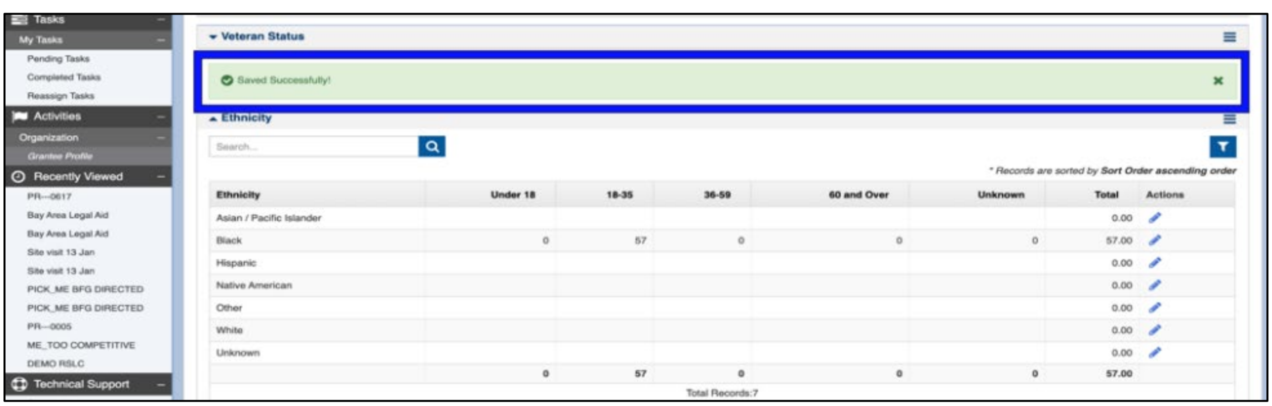


Figure 29: Image of Successfully Saved Message in the Demographics Tab

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.

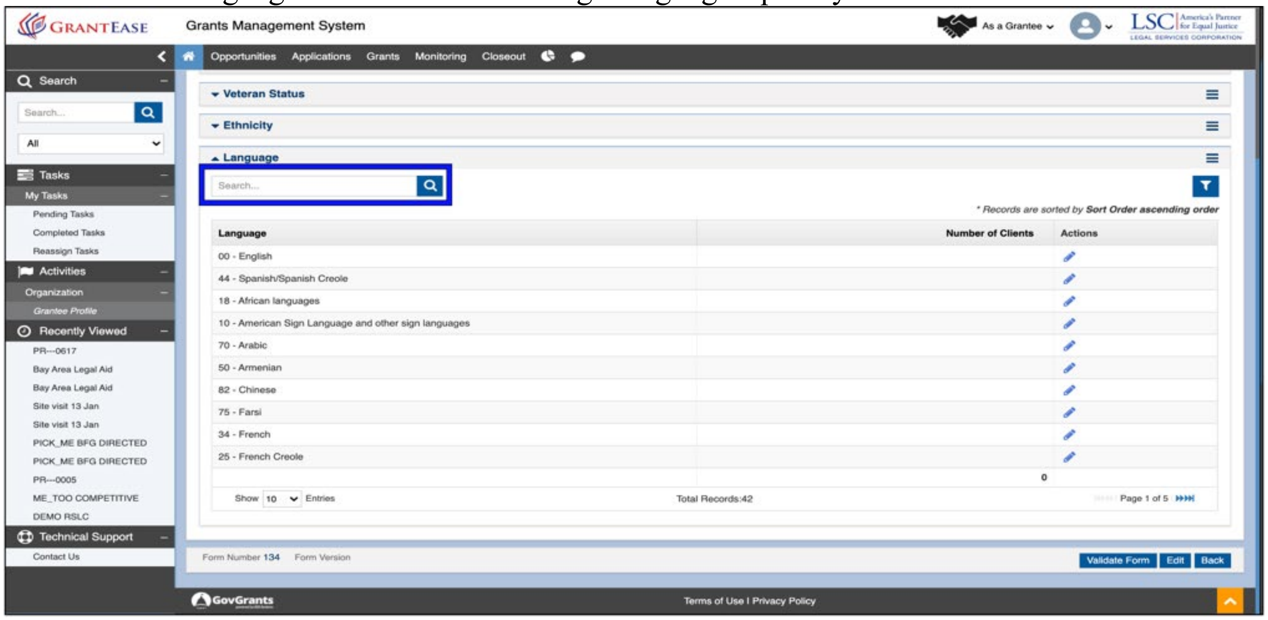


Figure 30: Image of Language Section of the Demographics Tab

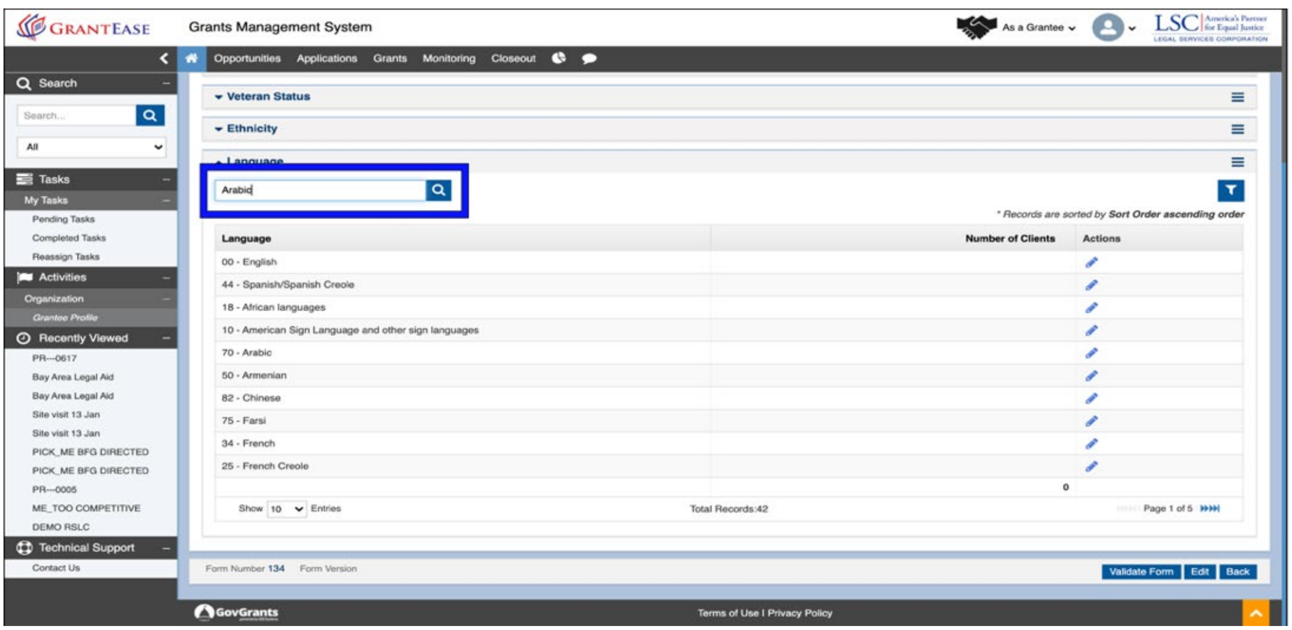


Figure 31: Image of the Search box for the Language Section of the Demographics Tab

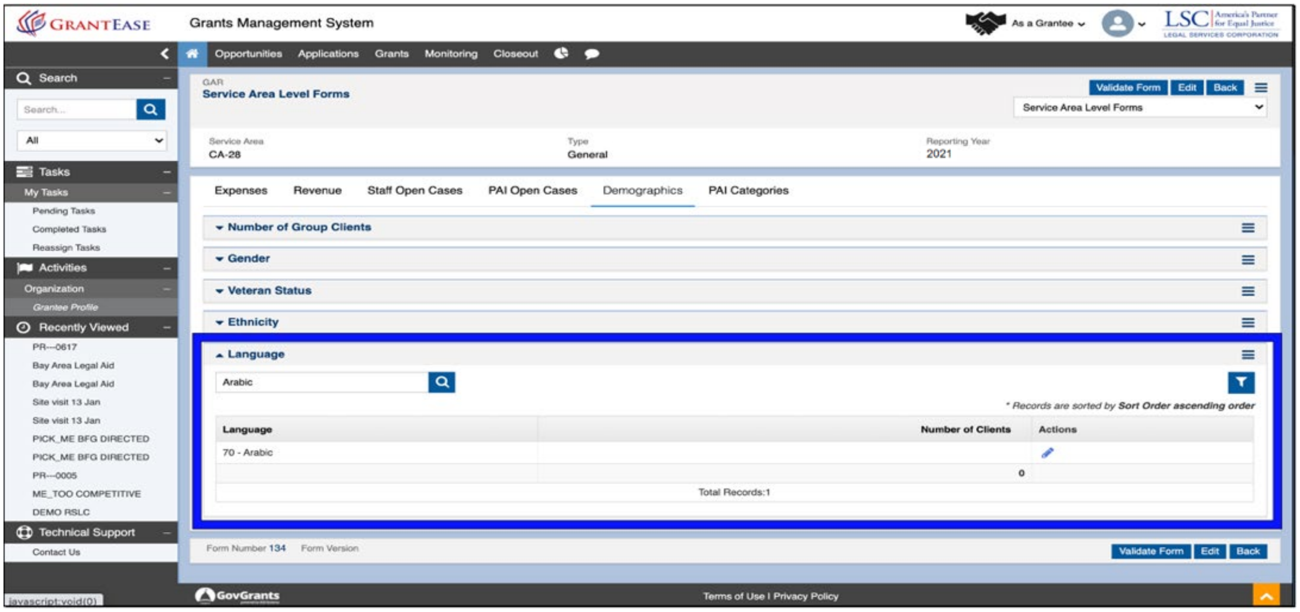


Figure 32: Image of Searching for and Finding "Arabic" in the Language Section

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.

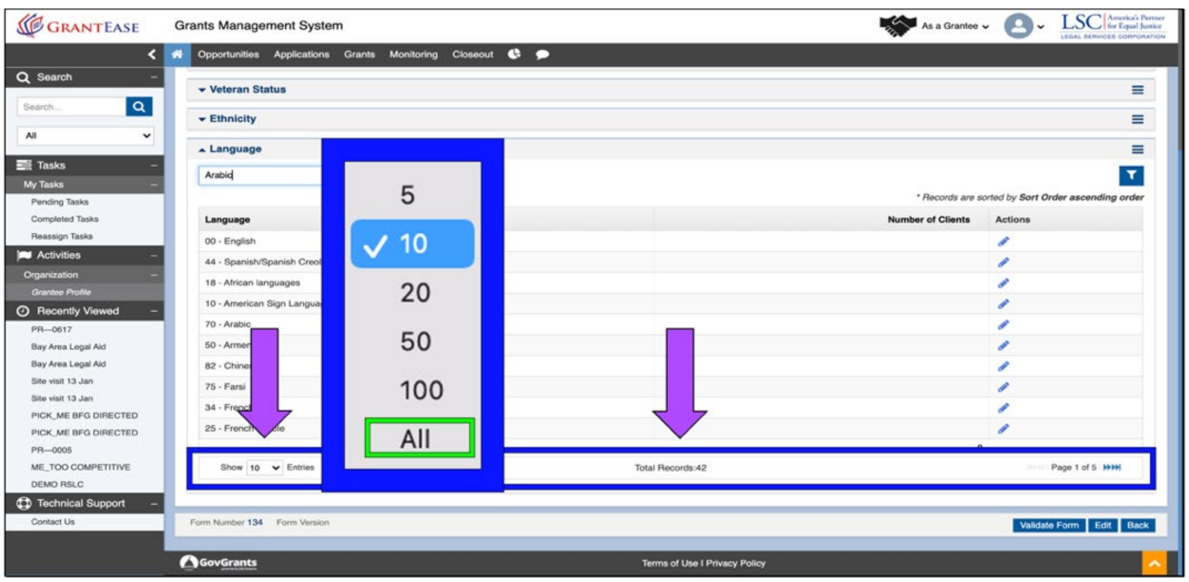


Figure 33: Image of Selecting "Display All Entries" in the Language Section

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.

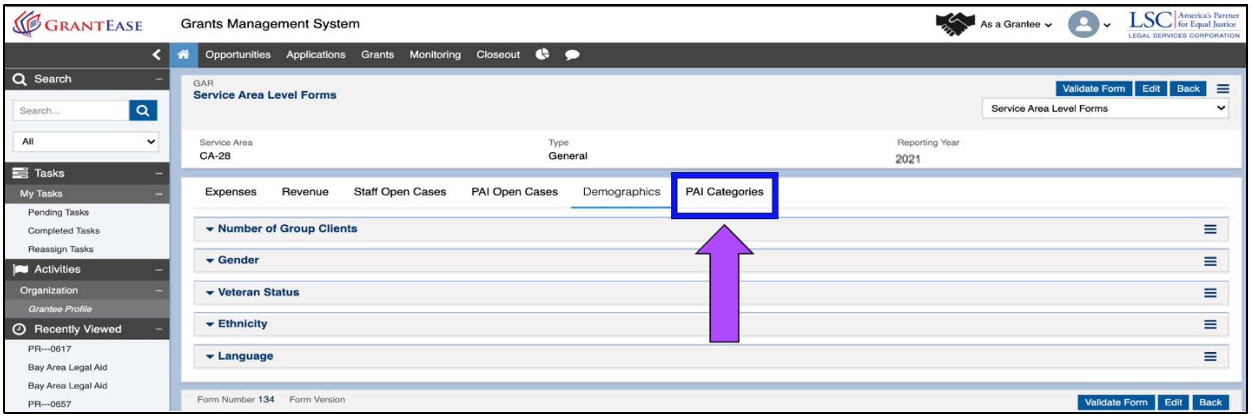


Figure 34: Image of Navigating to the PAI Categories Tab

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.

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

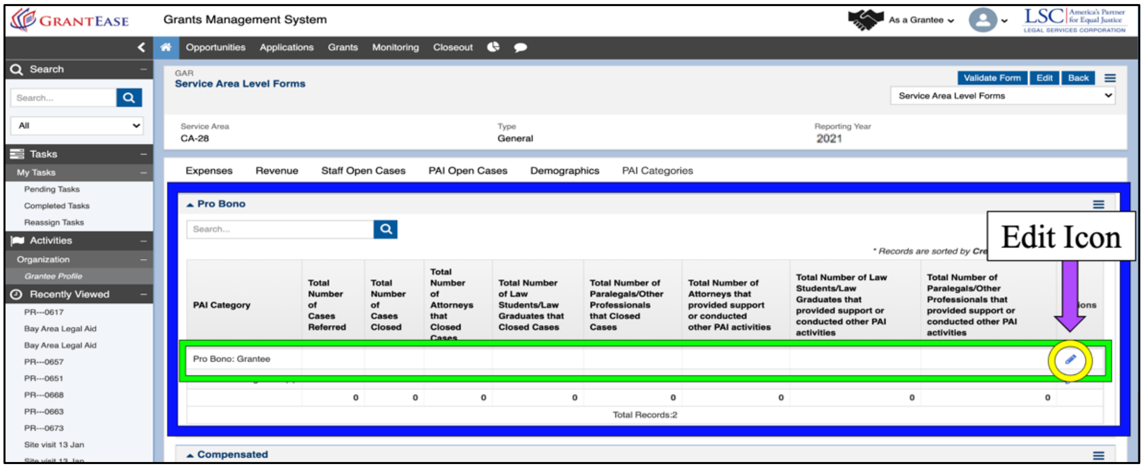


Figure 35: Image of Selecting Edit Mode for the Pro Bono Section of the PAI Categories Tab

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** ( ).

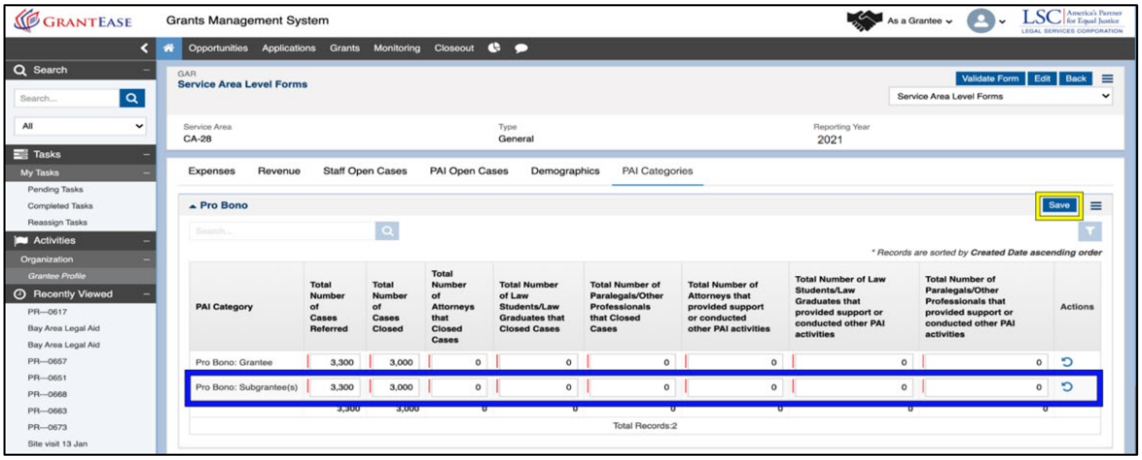


Figure 36: Image of the Undo Icon & Save Button on the Pro Bono Section of the Form

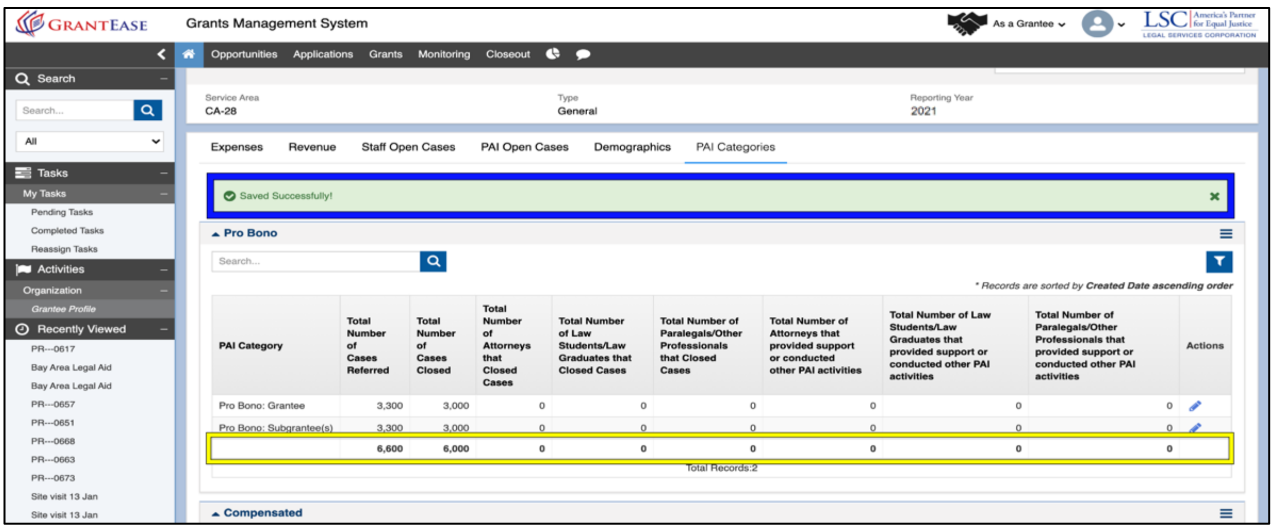


Figure 37: Image of Successfully Saved Message and the Totals Row for the PAI Categories Tab

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

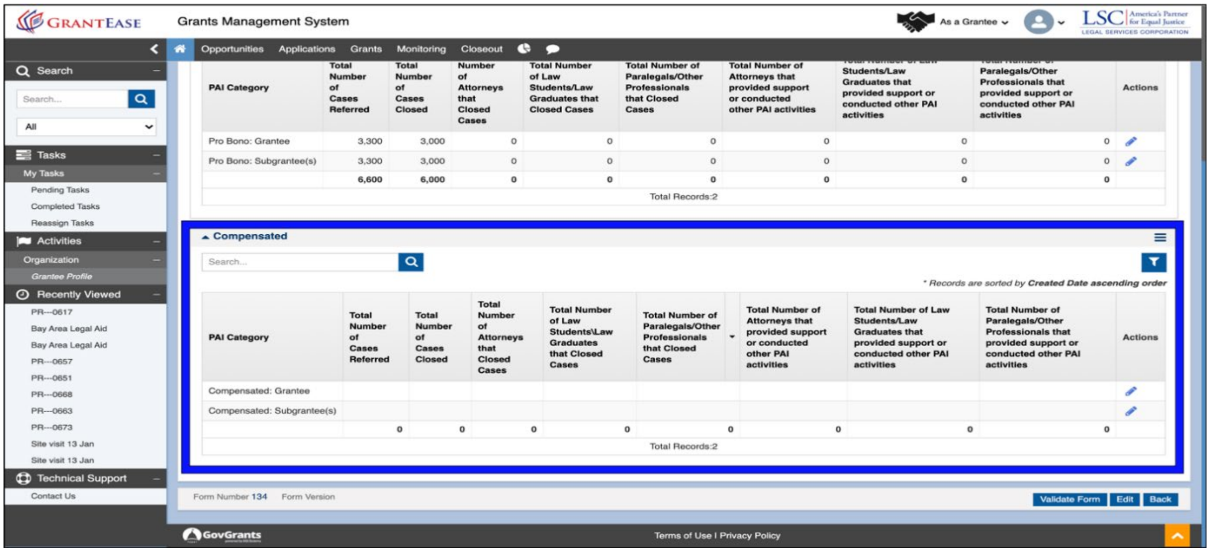


Figure 38: Image of Compensated Section of the PAI Categories Tab

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.

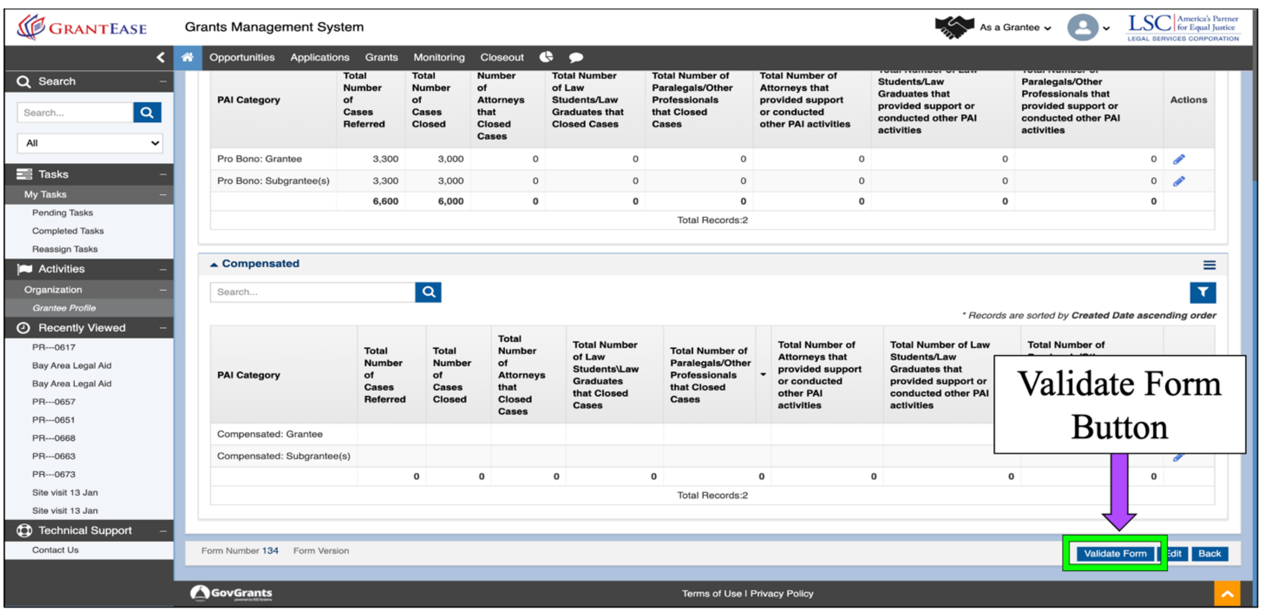


Figure 39: Image of the Validate Form Button for the Service Area Level Forms

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

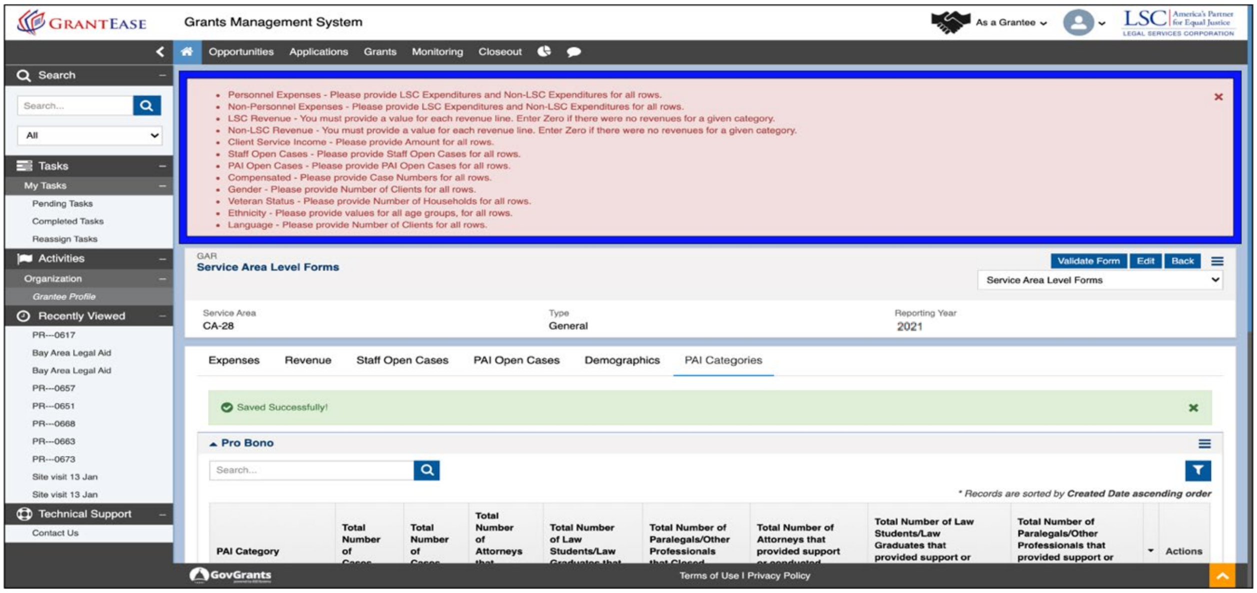


Figure 40: Image of the Validation Error Messages for the Service Area Level Forms

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.

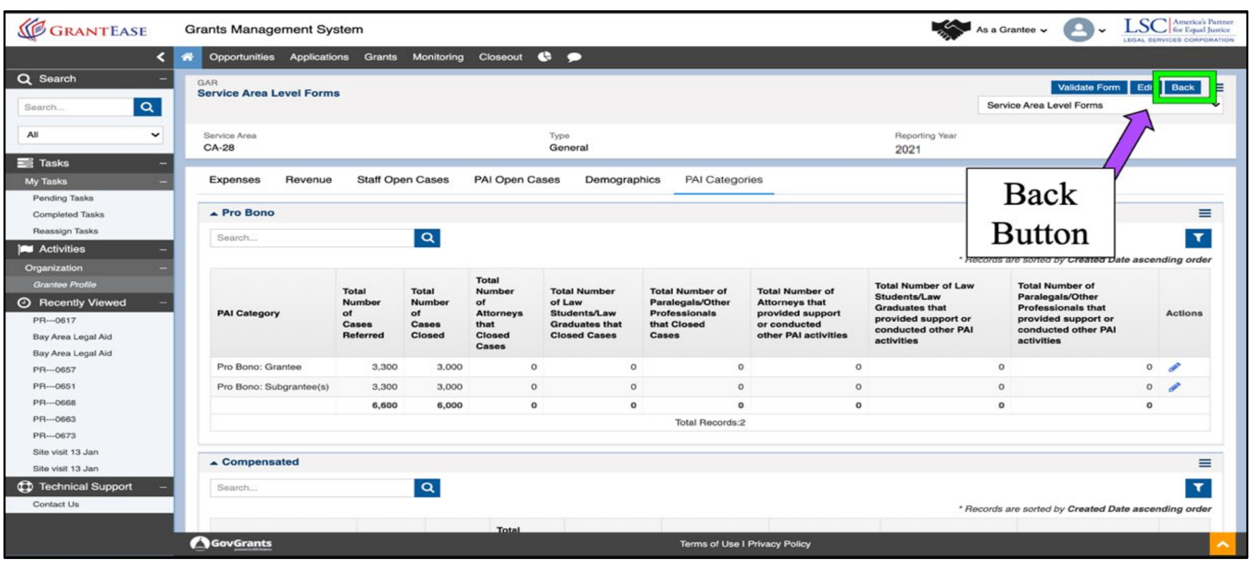


Figure 41: Image of Selecting the Back Button for the GAR Form(s)

This will take users to the initial screen for the **Grantee Activity Report**. Users will want to ensure that **__ALL__ 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**.

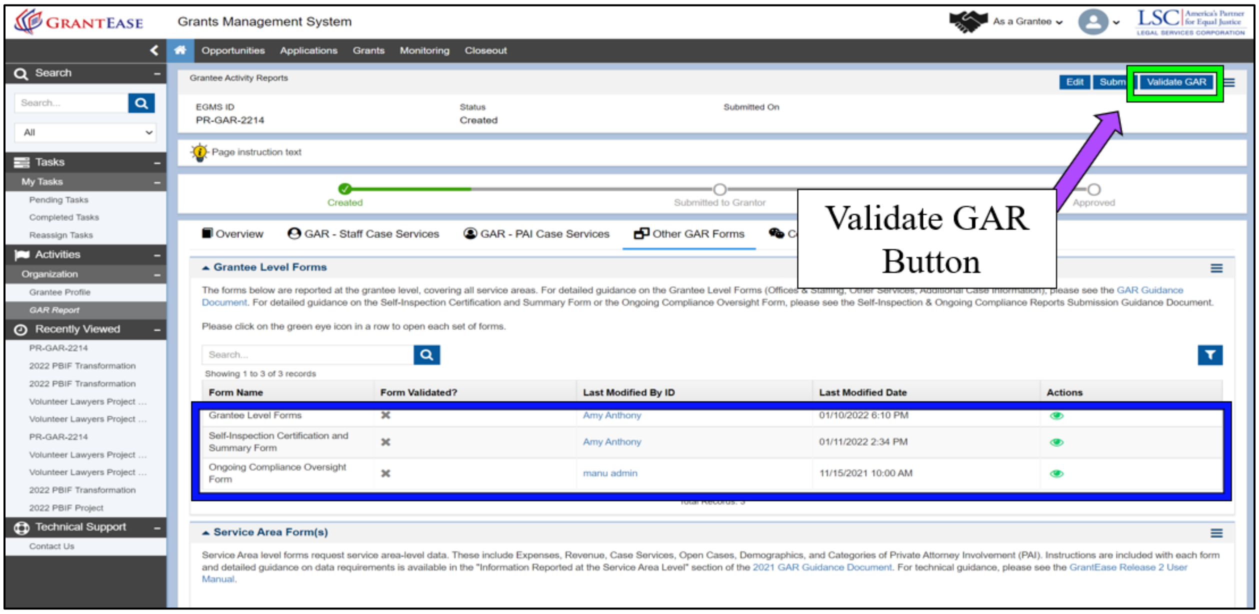


Figure 42: Image of Selecting the Validate GAR Button for the GAR Report

Users can then select the **Submit button**.

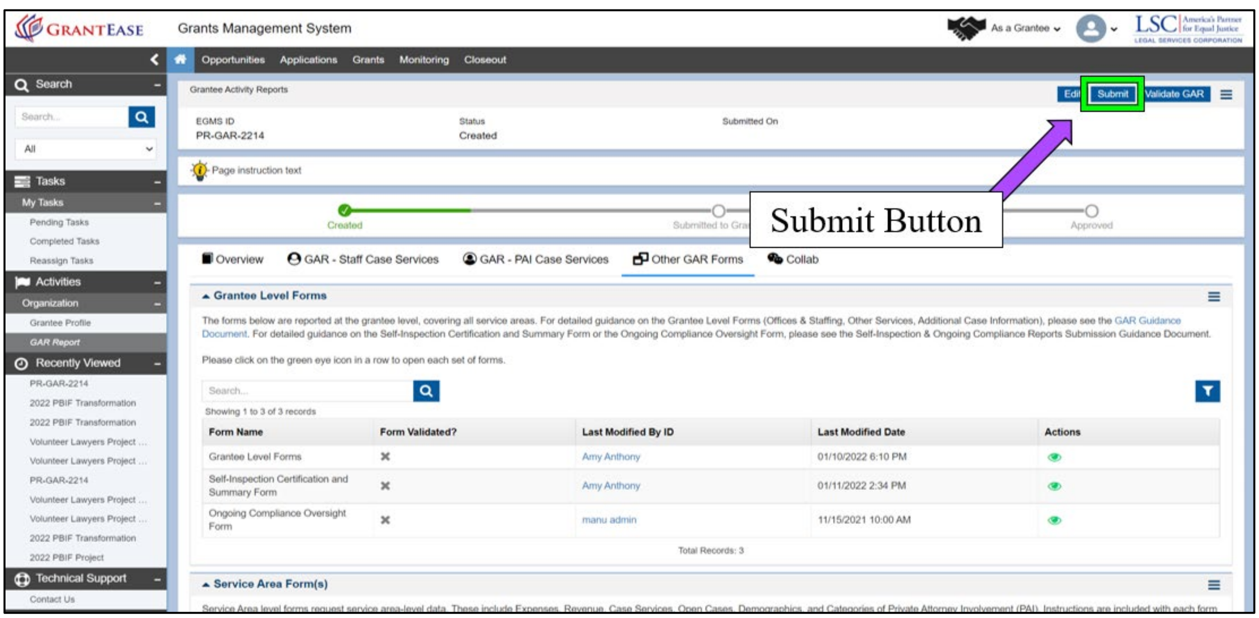


Figure 43: Image of Selecting the Submit Button on the Main Grantee Activity Reports Screen

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.

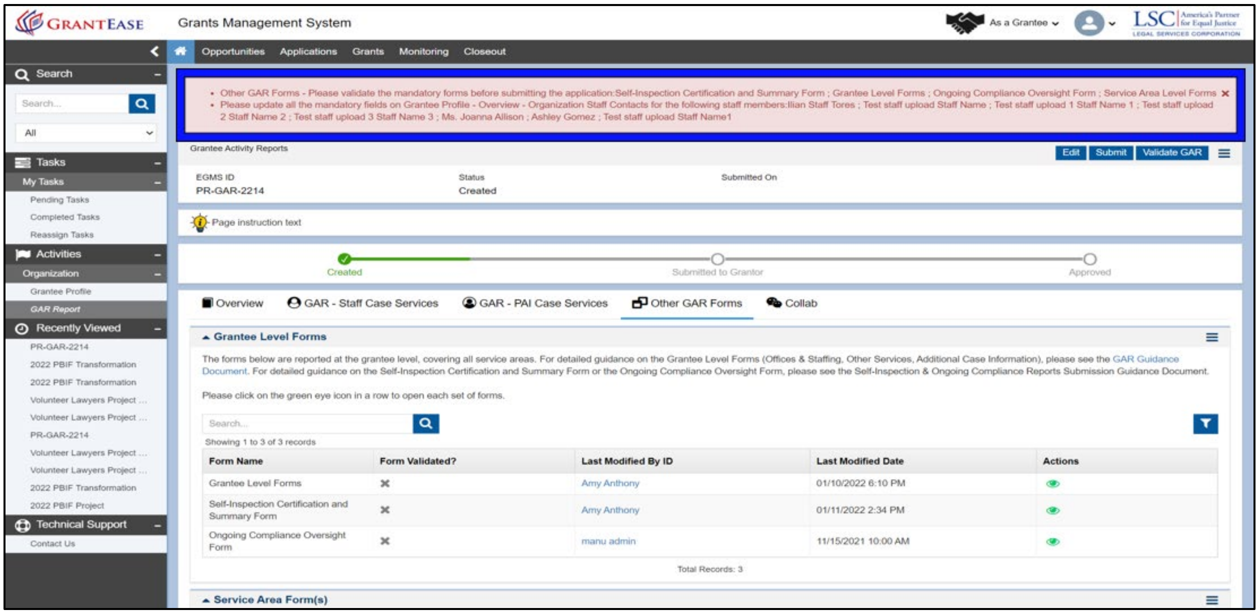


Figure 44: Image of GAR Validation Error Messages after Selecting the Submit Button

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

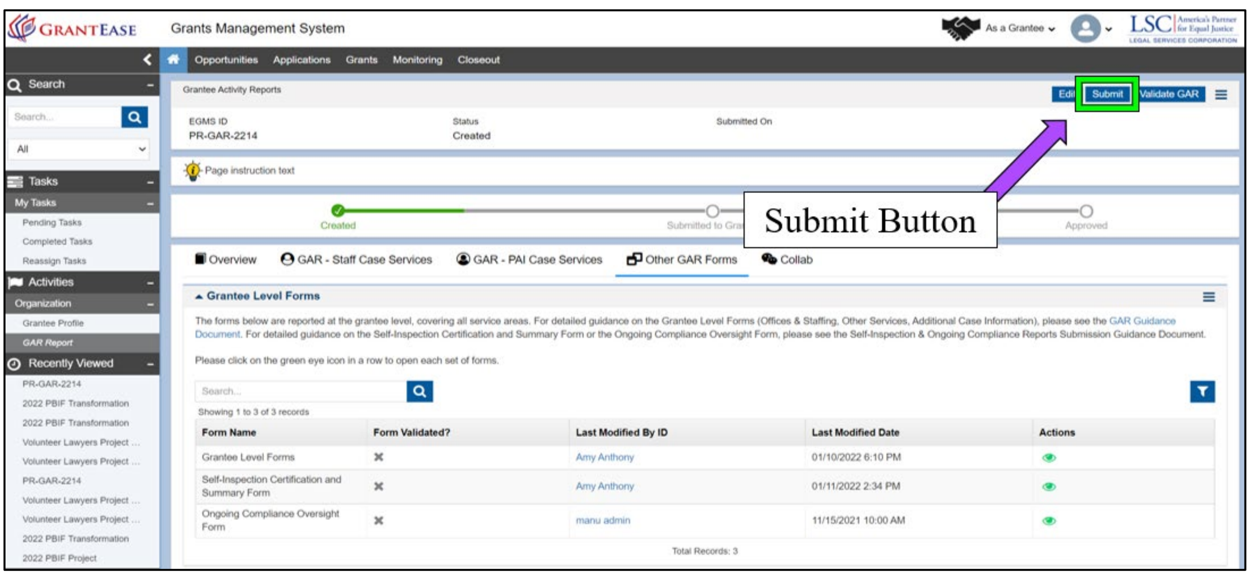


Figure 45: Image of Re-selecting the Submit Button after Rectifying All Validation Errors

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.”

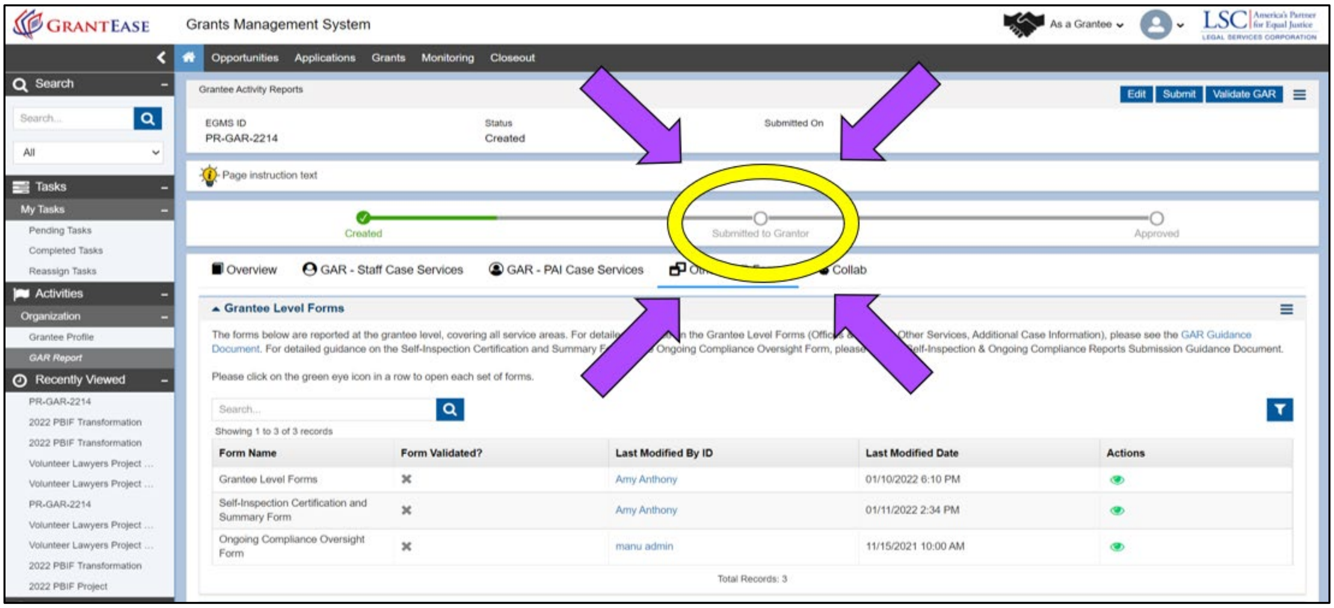


Figure 46: Image of the Status Bar Change that Should Appear after Submission of the GAR Reports

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	3. Cases Closed Not Reported to LSC (Number of non-LSC funded Cases not reported to LSC).*	Value provided should not be greater than 10,000.	
Validate Form					Validations for required responses/fields.	
Save or File Upload					Validations to 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 Submission			Grantee Staff Contacts	Service Area allocation	At least once service area must be associated for each staff contact.	Check is performed on staff contacts who are current staff and also on the staff contacts who were active for some time during the reporting year.
GAR Submission			Grantee Staff Contacts	Service Area allocation	The sum of service area percentage must be 100% for each staff contact.	Check is performed on staff contacts who are current staff and also on the staff contacts who were active for some time during the reporting year.

GAR Submission	Service Area	Demographics	Gender		The sum of 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 Submission	Service Area	Demographics	Veteran Status		The sum of Veteran and Groups in Demographics form must be equal to the sum of Staff and PAI case closures entered on the Case Services Form.	
GAR Submission	Service Area	Demographics	Total Clients Entered for Age & Ethnicity		The sum of Age/Ethnicity and Groups in Demographics form must be equal to the sum of Staff and PAI case closures entered on the Case Services Form.	
GAR Submission	Service Area	Demographics	Language		The sum of 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 Submission	Service Area	Categories of PAI - Basic Field Only	Pro Bono		Enter either value or zero in each cell	

GAR Submission	Service Area	Categories of PAI - Basic Field Only	Compensated		Enter either value or zero in each cell	
GAR Submission	Service Area	Categories of PAI - Basic Field Only	Totals		Total of all PAI Cases Closed should equal the Total number of PAI case closures recorded in the Case Services form.	
GAR Submission	GAR main screen	Staff and PAI Case Services	Totals		Sum of Staff and 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 ×

- 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:

> 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 Number of Cases with Error and Corrective Action (Yes/No) columns.
  - If there are no cases to report for the row, enter a zero (0) in the Number of Cases with Error 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.

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

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 Number of Cases with Errors 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 Errors Identified column and no response was entered or chosen in the Corrective Actions Taken column.
  - To resolve, open the record and select the appropriate response/s from the options provided under the Corrective Actions Taken 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 Corrective Actions Taken 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 Corrective Actions Taken.

- 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 Errors Identified 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.