

State Administrator How-to: State Dashboard Transcript

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From Intro Slide of Recording Session

Hello. Welcome to the training on how state administrators will use the Formula Subgrantee Progress reporting tool. This training is intended for formula state administrators.

This training video will cover how to:

- Access the tool;
- Generate a blank report; and
- Use the tool to review, approve, and submit subgrantee reports.

Start Zoom Recording Section

How State Administrators Access the Tool

State Administrators will receive an emailed invitation from MEI with a link to set up their account. Once your account is set up, you will access the tool by going to reporting.vawamei.org. Once logged in, State Administrators will be able to access their state's dashboard to:

- Generate links to blank and in-progress reports for subgrantees;
- Review, change request, and approve subgrantee reports; and
- Submit final subgrantee reports to MEI.

Note: State Administrators who are the administrators for both STOP and SASP will have access to the reports and data for both programs under one account.

If an additional person needs access to the state's dashboard or someone's access should be removed, administrators should email MEI at vawamei@maine.edu to request the change in access.

Subgrantee Access

Formula subgrantees **will not** have accounts. State Administrators will generate and send links to subgrantees to fill out a report online. Subgrantees will be able to save their progress and return to their report via their unique link at any time. When complete, subgrantees will submit their report directly to their state administrator through the tool.

Forgot password?

To reset your password, click “Forgot Password” on the login page. You will be brought to a new page titled “Forgot Password” where you will enter your email address and click “Submit.” Once you click submit, you will receive an email to the entered email address with a link and instructions for how to reset your password.

Locked Account

You will be temporarily locked out of your account for 10 minutes if you incorrectly enter your password five times in a row. You will receive an email notification when you are temporarily locked out. If you still do not know your password once your account is unlocked, try resetting your password using the "Forgot Password" function. If you received a “Locked Account” email when you were not trying to log in, please let us know at vawamei@maine.edu.

PAUSE

Overview of the State Dashboard

Navigating the Dashboard

Once logged in to the tool, State Administrators will first be brought to the homepage. Navigate to the Dashboard by clicking “Dashboard” at the top of the page.

From the Dashboard, State Administrators can generate links to blank subgrantee reports, monitor subgrantee reports in progress, review submitted subgrantee reports, and approve and submit subgrantee reports to MEI.

State Administrators cannot directly communicate with subgrantees through the tool. State Administrators will need to communicate with subgrantees outside of the tool in whatever way works best for them.

The Dashboard has two main tabs: Pending Submissions and Approved Submissions.

- **Pending Submissions** is the default view. This tab shows all the subgrantee reports that are in progress, reports that have been completed and submitted for review and approval, as well as reports the State Administrator has denied and requested edits for. Once a subgrantee report has been approved, the report is moved to the “Approved Submissions” tab.

- **Approved Submissions** displays all of the subgrantee reports that have been approved by the SA.

Both the Pending and Approved Submissions tabs will remain empty until subgrantees begin filling out reports. Once a subgrantee begins to fill out a report, a row will appear in the pending submission table showing the subgrantee's information. Options to filter and sort the subgrantee reports are available in a variety of ways.

Filtering Reports

- **Filtering Reports by Program:** If a State Administrator is the administrator for both STOP and SASP, this dropdown will allow State Administrators to view either the STOP subgrantee reports or the SASP subgrantee reports. If a State Administrator is the administrator for only one program, only one option will appear in this dropdown.
- **Filtering Reports by Date Range:** This feature will filter the reports by their "Last Updated" date. Click into the Date Range field to select the dates you want to review. If a date range is not selected, all pending reports will show.

Sorting Reports

State Administrators can sort the reports in each tab by clicking on the column headers. Once clicked the dashboard will automatically sort by that column. To sort by a different column, simply click on a different column's header. Headers that you can sort by include: Subgrantee, Name, Email, Last Updated, and Status.

PAUSE – open report in another tab so you can show edit this report function

Creating a Blank Report

In order to provide subgrantees access to their individual progress reports, State Administrators must first generate a blank progress report URL. To do this, click the "Blank Form URL" button above the Pending and Approved Submissions tabs. Once clicked, the system will generate a link to a blank report. State Administrators will then copy and paste the link(s) into their communication with subgrantees. State Administrators need to communicate with and provide link(s) to subgrantees outside of the tool.

The system is set up to generate only one link per form, per state. A State Administrator will only have one link for STOP and/or one link for SASP and that one link will be sent

to all STOP and/or SASP subgrantees for the state. Once subgrantees begin to fill out reports, a unique link for each individual report will be generated.

State Administrators can fill out reports on behalf of subgrantees. To do this, the administrator should access a blank report using the link generated from the State Dashboard and proceed as a subgrantee would. Once the State Administrator moves past the initial page, they will need to click “Edit This Report.” The “Edit This Report” function will only appear for State Administrators.

Dashboard Features

Both the pending submissions and approved submissions tabs in the Dashboard are organized into tables with the following columns:

- **Subgrantee:** Subgrantee name entered into the subgrantee’s report.
- **Name:** The first and last name of the Point of Contact in the subgrantee’s report.
- **Email:** Email address of the Point of Contact in the subgrantee’s report.
- **Last Updated:** The date the report was last modified.
- **Status:** Indicates if the subgrantee’s report is pending (i.e., in progress), has been submitted, or has edits requested.
- **Actions:** The admin can:
 - **View:** View an individual subgrantee’s report. To do this locate their name in the table and click the “View” button. The report will open in a new tab. To make edits to the report click the “Edit This Report” button at the top right corner of the page.
 - **URL:** Click the “URL” button to generate a link for an individual subgrantee report; helpful if the subgrantee has lost their link.
 - **Delete:** Click the “Delete” button to delete a subgrantee’s report. This button will only appear if the report is in a “Pending” status. Once a report is deleted, you will not be able to retrieve it.
 - **Approve:** This button will only appear if the report is in a “Completed” status. Click the “Approve” button to change the status of the report to “Approved,” which will move the report to the “Approved Submissions” tab. Each subgrantee report needs to be approved before it can be submitted to MEI.
 - **Deny:** This button will only appear if the report is in a “Completed” status. Once a subgrantee completes and submits a report, the report will be locked. The report can only be unlocked by the SA. If it is determined by the State Administrator that changes to the report are required, click the

“Deny” button to change the status of the report to “Edits Requested,” which unlocks the report so the subgrantee can make the requested edits. Again, State Administrators need to communicate with subgrantees outside of the tool to request the needed edits.

Actions Column - Approved Submissions Tab

The Actions column in the Approved Submissions tab include:

- **View:** The “View” button allows the State Administrator to see the subgrantee’s report. Clicking the “View” button will open the subgrantee’s report in a new tab. If you would like to make edits to a subgrantee’s report, you will need to first “Unapprove” the report and then click “Edit This Report” in the top right corner of the report in order to make edits.
- **URL:** Click the “URL” button to generate a link for an individual subgrantee report.
- **Download:** Click the “Download” button to download an individual subgrantee report’s data as an Excel file.
- **Unapprove:** Click the “Unapprove” button to move a report back to the pending submissions tab. This button appears only when the report is in “Approved” status.

Submitting Reports to MEI

When the State Administrator has finished reviewing and has approved all of the subgrantee reports, they will submit the reports directly to MEI by going to the Approved Submissions tab on the Dashboard. To submit all subgrantee reports click the “Submit and Finalize” button. A pop-up will appear asking if you are sure you want to submit your approved reports to MEI. If yes, click “OK.” If you do not wish to submit the subgrantee data, click “Cancel.”

Once a report has been submitted to MEI, the status of the report will change to “Submitted.” You might need to refresh your page to see the status change. The State Administrator will no longer be able to “Unapprove” the report or view the report within the tool once it has been submitted to MEI. The State Administrator will be able to download the report’s data as an Excel file at this point. If there is an issue with the submitted report, please contact VAWA MEI at vawamei@maine.edu and detail the issue.

Downloading Report Data

State Administrators can download the data reported by subgrantees using the “Download Reports” button located above the pending and approved submissions tabs. The “Download Reports” button will download all of the data for the reports currently displayed in the dashboard table as an Excel file.

Once a report has been approved by the State Administrator and has moved to the “Approved Submissions” tab, State Administrators can download individual report data into an Excel file. Simply locate the subgrantee name in the table and click the “Download” button under the Actions column.

Last slide

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