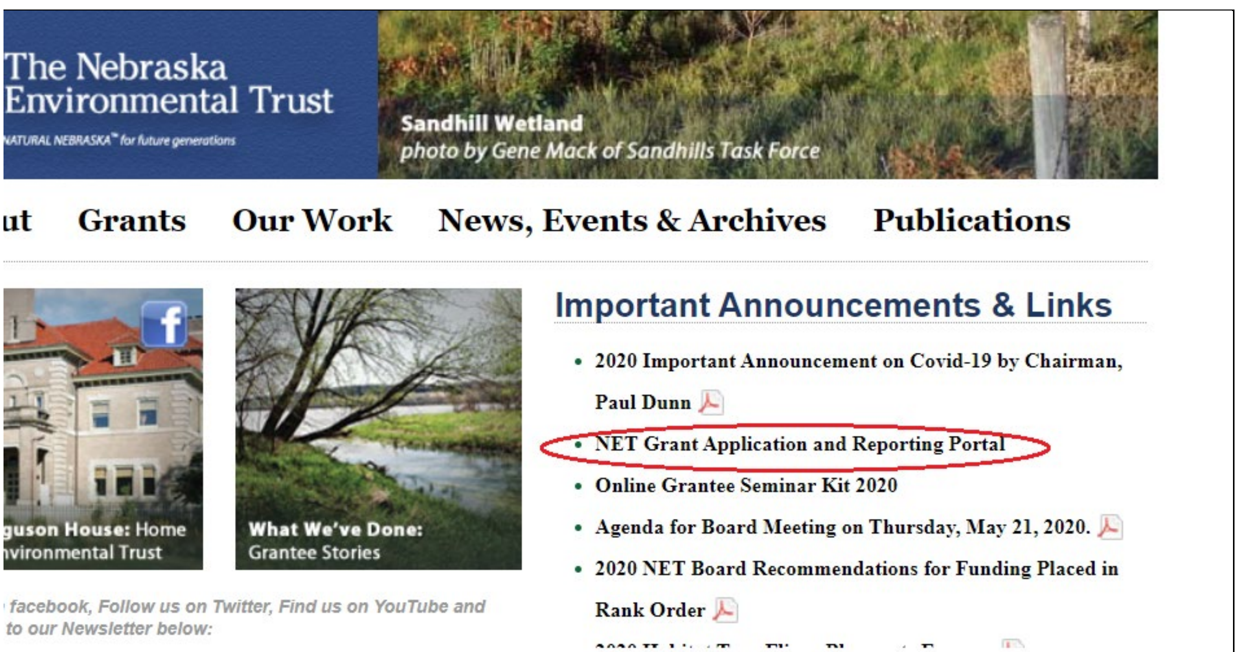
Nebraska Environmental Trust Reporting Portal Instructions DRAFT

Contents

Start at the NET web address **environmentaltrust.nebraska.gov**

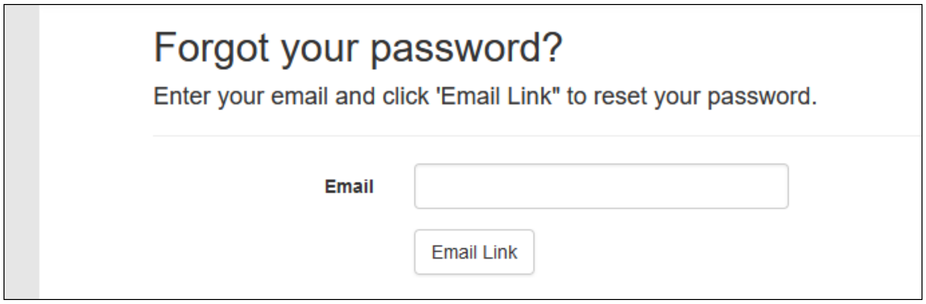
1. Click on "NET Grant Application and Reporting Portal"
   or bookmark this address; environmentaltrustgrants.org



2. The Application Portal will require the user to login to access your NET grants.

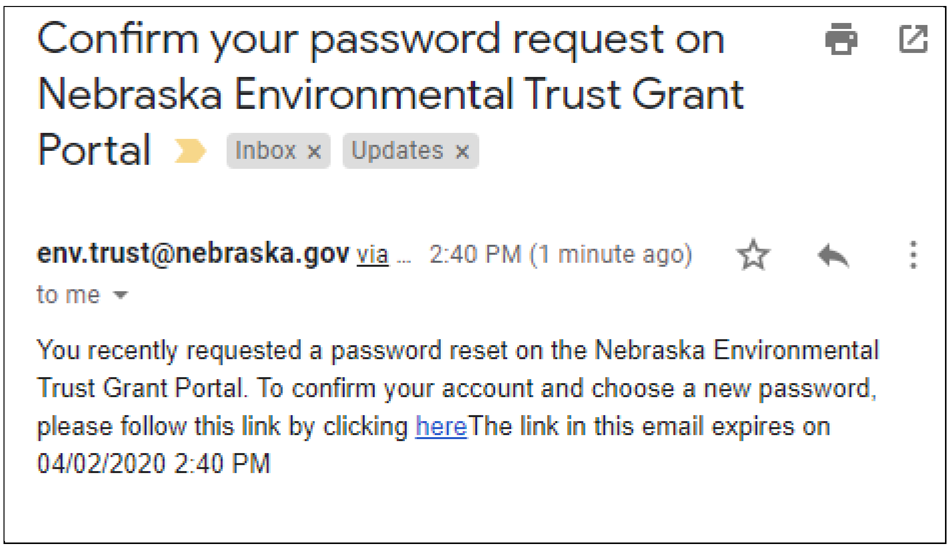
Resetting your Password

   a. If you have problems with login: Click "Forgot your password?"

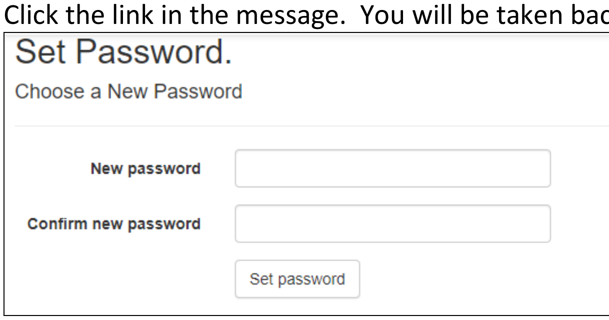


b. Enter your email and click ‘Email Link’; (NOTE: use the email identified as the primary contact).

c. You will receive an email from env.trust@nebraska.gov with a link to reset your password. You may have to wait 10 minutes (+/-) but typically the email shows up quickly and you can simply click the link. If you do not get an email, check your email spam folder. The email will look like this:



d. Click the link in the message. You will be taken back to environmentaltrustgrants.org.



e. The Password must be eight characters and have at least one numeric and one special character. A special character must be one of the following ! @ # $ % ^ & * _

Managing Applications and Grants

Once logged in this is the screen you will see with the following options:

The Nebraska Environmental Trust — My Applications | My Projects | Contact | Help | mtabor9@gmail.com

Grant Applications

New Application

Manage	Portal ID	App Year	Last Updated	Current Status	Project Sponsor	Project Name	Created
✎	4280	2020	9/5/2019 1:04:59 PM	Received	Nebraska Grazing Lands Coalition	Conservation of Nebraska Grazing Resource Through Control of Eastern Red Cedar and Other Invasive	9/5/2019 1:04:59 PM

At the top of the page in the gray bar you have these options: My Applications / My Projects / Contact / Help / and your user email address

My Applications	List of applications you have created for NET funding
My Projects	List of approved NET applications
	*****This is what you will choose to manage your awarded grant projects *****
Contact	Contact information for NET Staff
Help	FAQs, Standards of Evaluation, and Applications
name@email.com	The email address you are logged into the portal with

1. To Manage an awarded project, choose "My Projects"

2. Once you select My Projects, the list of awarded projects for which you are the Primary Contact will be displayed. Choose the pencil icon in the first column under "Manage Project" for the project you want to manage.

My Projects

Manage Project	Portal ID	App ID	Project Sponsor	Project Name	Last Updated
✎	58	18-141	The Groundwater Foundation	Recharging Groundwater Education: Tools for Community Action and Engagement	9/9/2018 8:22:31 PM
✎	67	18-145	Nebraska Recycling Council	Recycling Equipment Grants and Consultation	9/9/2018 8:22:31 PM

3. When you have selected a project, the Project Management page for that project is displayed. allowing you to manage all of the recording elements of your project as described in the following sections.

Final Budget | Summary of Invoices | Transaction | Match Report | Equipment | Real Estate | Report

Final Budget information for 2020 and 2019 2nd year awards

Click Manage Final Budget. Complete the Fiscal Agent information. This does NOT apply to State agencies or UNL
It is very important that you complete this section with the same information used when you created the direct deposit ACH form for State Accounting. If you have questions contact Allison or I.

If this is the first year of a 2020 grant, the budget is going to include the budget categories and amounts from your application. Verify the Awarded Amount, Total Project Funding, and the Totals match. The only reason to make a change is if you were awarded less than you requested.
Click Save Click Submit

If this is the second year of a 2019 grant begin by: clicking on "My Projects" and then choose the AppID (19-xxx-2) you want to work with.

Click on the Final Budget tab

Click Manage Final Budget

Click the box in front of Is Fiscal Agent same as Project Sponsor?

Fill in the address using the information from the W-9 you filed with State Accounting.

Click "Copy Categories from Another Project" and copy from first year AppID (19-xxx). Then fill in the dollar amounts for each category based on your 2020 budget from the grant application to total the "Total Project Funding."

What if I have overspent in a category? --- Instruction may need to be modified

IF YOU HAVE AN OVERSPENT BUDGET CATEGORY, CALL AND DISCUSS WITH MARILYN.

1. Write a letter and request the modifications. Include a brief explanation for over-expenditures and how the initial grant objectives will be met with the shift in funds requested.
(The NET Board reviews all budget modifications that NET Administration approves and will need to see the modification proposal and justification in your letter).
2. NET will review the modification request letter and respond with an approval letter.
3. NET will WITHDRAW approval of the budget in the grant portal to allow you to make the modifications approved in the letter.
4. Make the modifications in your budget in the reporting portal. Click "Save" and click "Submit"

Summary of Invoices

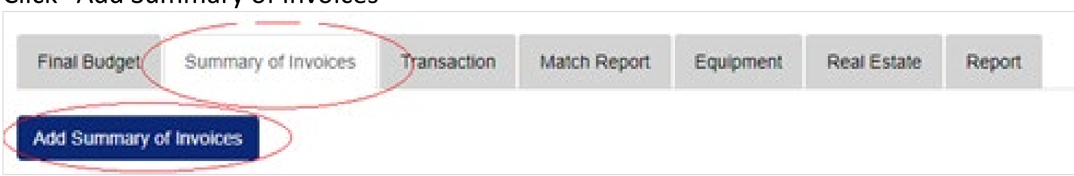
You are now ready to submit a reimbursement request. Make certain you are logged into environmentaltrust.nebraska.gov and Click "NET Grant Application and Reporting Portal"

> How you organize your files and pdfs is up to you. Use whatever works best for you. I created a specific folder to put all the receipts for which I was going to request reimbursement. For example, I named a folder NET 19-103 Receipts with a Subfolder for the period of the report I am creating – Jan-March 2020

1. Click on "My Projects" in the gray bar at the top, right of the screen. Choose your grant. **If you will be submitting an invoice for equipment valued over $1,000, go to the Equipment Tab first and follow the instructions on that tab. If not, proceed to Summary of Invoices.**

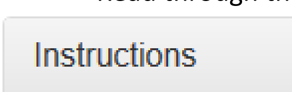
2. Click "Summary of Invoices"

3. Click "Add Summary of Invoices



The screen will look like this:

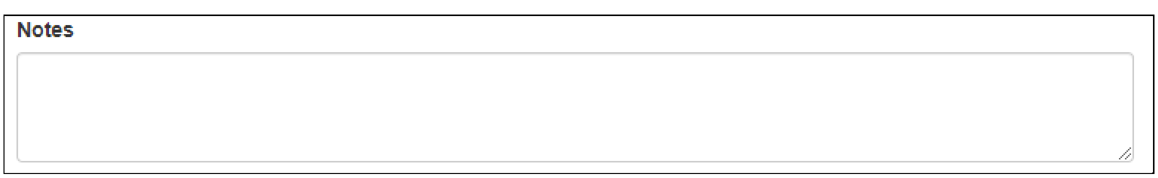
4. Title should be how you and NET will reference this reimbursement request, i.e. "Jan-Mar 2020" Read through the instructions below the "Title" box.

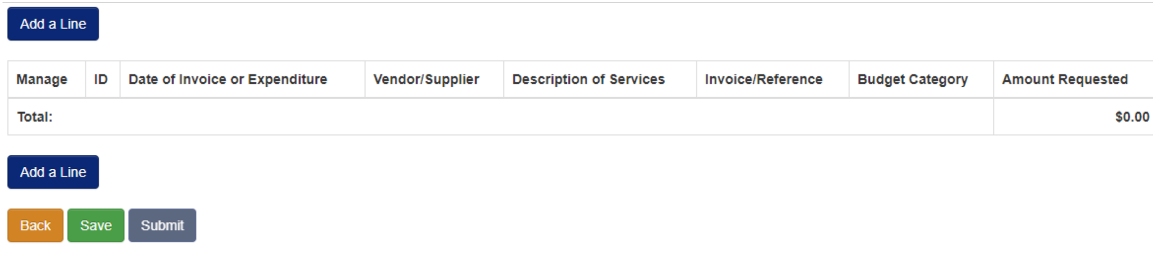


Click in the "Instructions" bar to minimize the instructions.

YOU CAN SAVE AT ANY TIME AND COME BACK TO THE SUMMARY OF INVOICES LATER WITHOUT LOSING ANY INFORMAITON. USE 'SAVE' OFTEN.

5. I suggest you use the "Notes" segment to make notes for yourself and then change it to notes to me before you send your reimbursement request.



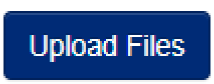


Manage	ID	Date of Invoice or Expenditure	Vendor/Supplier	Description of Services	Invoice/Reference	Budget Category	Amount Requested
Total:							$0.00

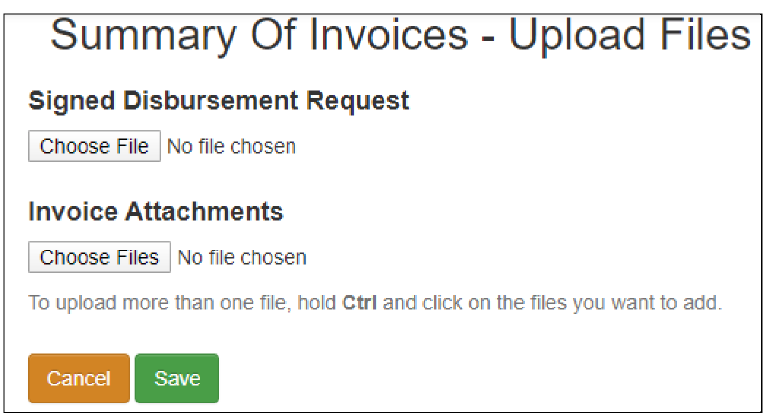
6. Click “Add a Line” for each invoice you want reimbursed. For each line item,
   a. fill in the date of the invoice,
   b. the name of the vendor,
   c. what eligible expenditures are you paying,
   d. the name of the pdf you are attaching,
   e. which Budget Category will be used,
   f. the Amount NET will reimburse.
   NOTE: If this is different than the amount on the invoice, make certain the amount in “Amount Requested” is also written on the pdf receipt attached.

   If one invoice needs to be split between budget categories, list the invoice as many times as you need with the appropriate amount allocated to each Budget Category .

7. Click “Save”. After you have clicked Save you will see the “Upload Files” button. I recommend you click “Save” often.

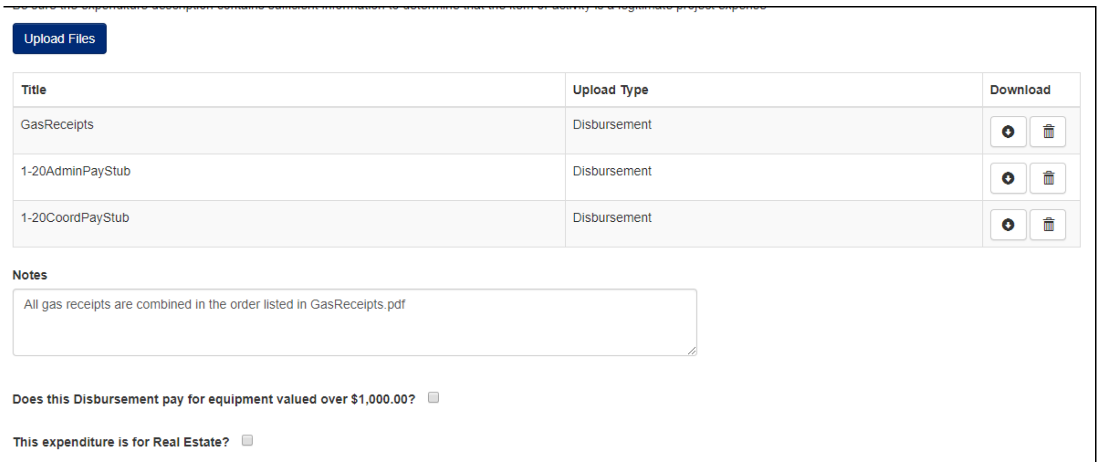
8. Click 

   You will see “Summary of Invoices –Upload Files.
   1. Choose Files and upload the pdf for invoices. **IT IS IMPORTANT TO UPLOAD THE INVOICE FILES FIRST.**
   2. Upload the “Signed Disbursement Request” AFTER you get the form created in future steps to follow.



9. Click “Choose Files” below the **Invoice Attachments** heading.

a. Before uploading, name the files clearly to identify the line it is associated with.
b. Upload the pdf files to support the amounts listed in “Amount Requested”.
c. Upload each file and click Save.
   If you uploaded the wrong file, you can delete the file and make the correction.



Upload Files

Title	Upload Type	Download
GasReceipts	Disbursement	
1-20AdminPayStub	Disbursement	
1-20CoordPayStub	Disbursement	

Notes

All gas receipts are combined in the order listed in GasReceipts.pdf

Does this Disbursement pay for equipment valued over $1,000.00?

This expenditure is for Real Estate?

10. Click Save

11. Click Print Report to Sign in the upper right side of screen. This creates the Periodic Report Cover Sheet. I saved this pdf in the folder with my invoices and reports for this reimbursement request.

12. Get the form signed and scan the signed form. Save it as a pdf.

13. Click Upload Files

14. Under **Signed Disbursement Request**, choose the pdf file of the scanned signed document.

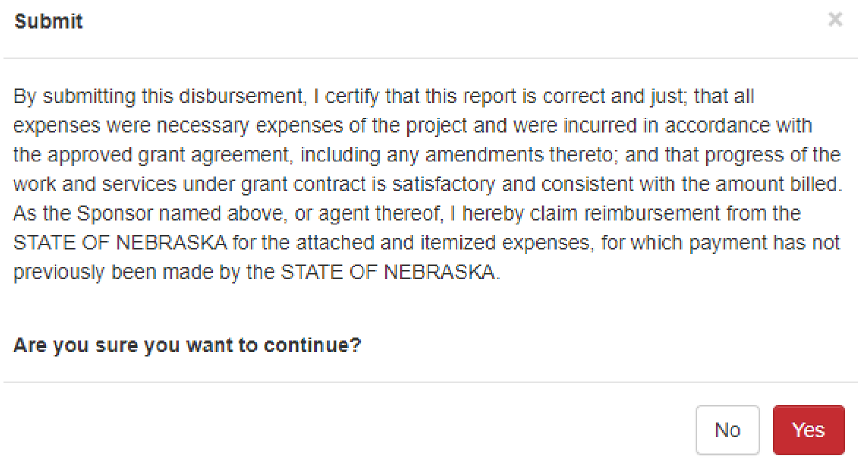
15. Click “Save”

    NOTE: You MUST upload the signed disbursement report and Summary of Invoices to Submit. You will get a Submission Error if the signed disbursement form is not attached.

16. Click Submit

    If you request funds that exceed the budget amount in a category you will get a warning on Submission. You can go ahead and save your work and resubmit after the modification has been approved (see earlier notes about budget modifications).

If the request is complete you will get this message.

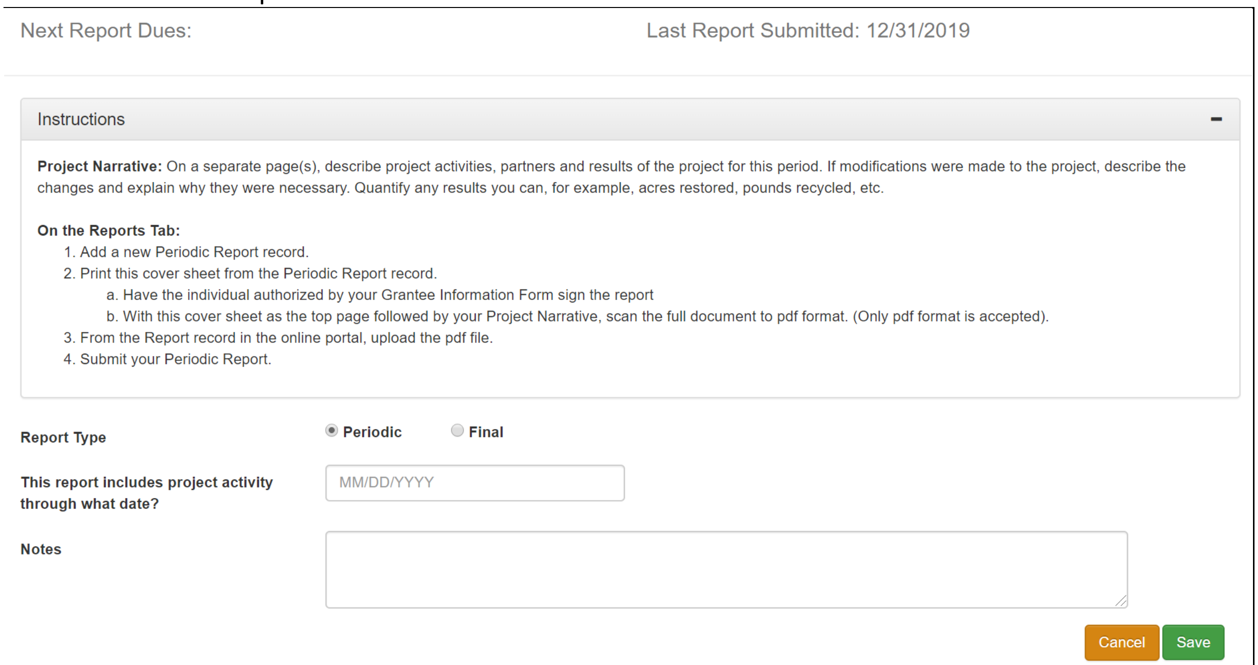


17. Click “Yes”. The top part of your screen will now show the amount of the disbursement request you submitted.

Report

You will use this tab to submit the quarterly Narrative report and to submit final reports at the end of the grant.

1. Click on the “Report” tab
2. Click “Add Report”



Next Report Dues: Last Report Submitted: 12/31/2019

Instructions

Project Narrative: On a separate page(s), describe project activities, partners and results of the project for this period. If modifications were made to the project, describe the changes and explain why they were necessary. Quantify any results you can, for example, acres restored, pounds recycled, etc.

On the Reports Tab:
1. Add a new Periodic Report record.
2. Print this cover sheet from the Periodic Report record.
   a. Have the individual authorized by your Grantee Information Form sign the report
   b. With this cover sheet as the top page followed by your Project Narrative, scan the full document to pdf format. (Only pdf format is accepted).
3. From the Report record in the online portal, upload the pdf file.
4. Submit your Periodic Report.

Report Type Periodic Final

This report includes project activity through what date? MM/DD/YYYY

Notes

Cancel Save

3. Read the Instructions and then click on the word “Instructions” to minimize that space.
4. Report Type – “Periodic” will be the default. Only chose “Final” at the end of your grant.

   This report includes project activity through what date?

5. Fill in the appropriate date for the end of the quarter you are reporting

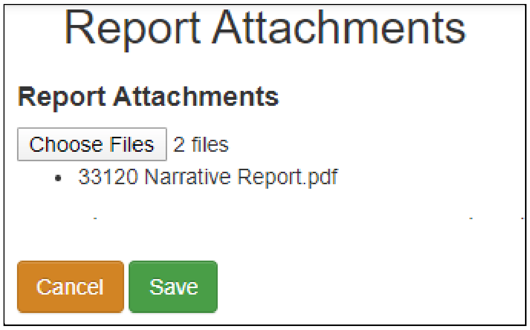
6. Use Notes to communicate specific information to Marilyn.

7. Click “Save”

8. Click Print Cover Sheet in the upper right corner of the screen to create a pdf of the Periodic Report Cover Sheet.

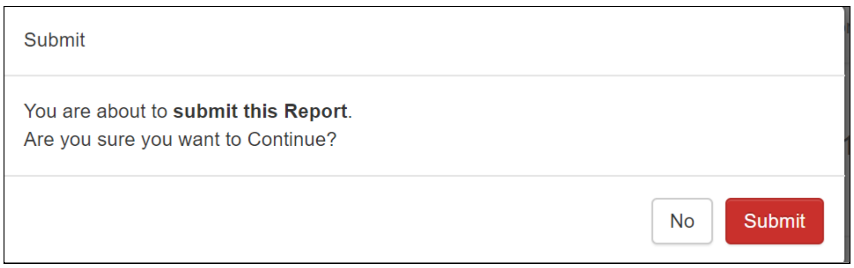
9. Scan or save the narrative report for the quarter as a pdf.

10. Click “Upload Files”, “Browse” and attached the Periodic Report Cover Sheet and the narrative report.



11. Click "Save"

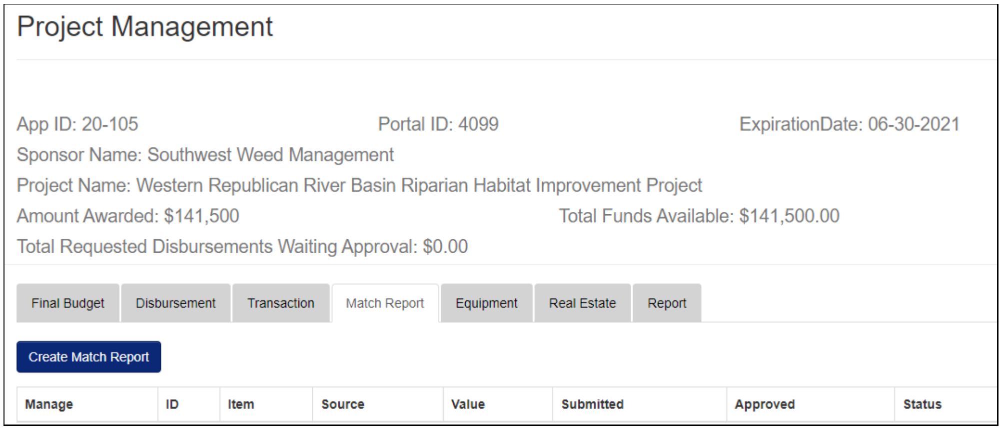
12. Click "Submit"



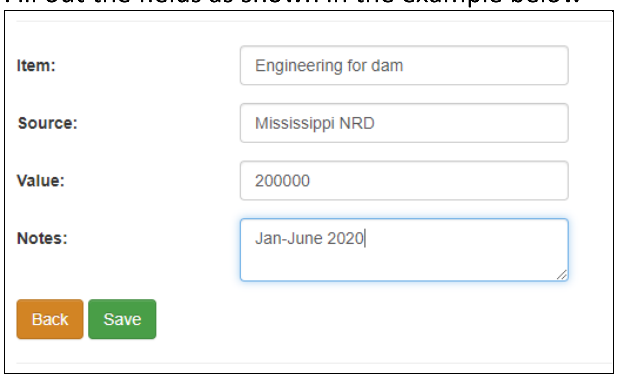
13. Click "Submit"

Match Report

1. Click on the Match Report tab



2. Fill out the fields as shown in the example below



3. Click Save.
   You will have an opportunity to edit this or Submit.

4. When you click “Submit” you will be asked if you want to continue.
   a. Click “Submit”.
   b. NOTE: You can reopen and edit this anytime previous to your Final report.

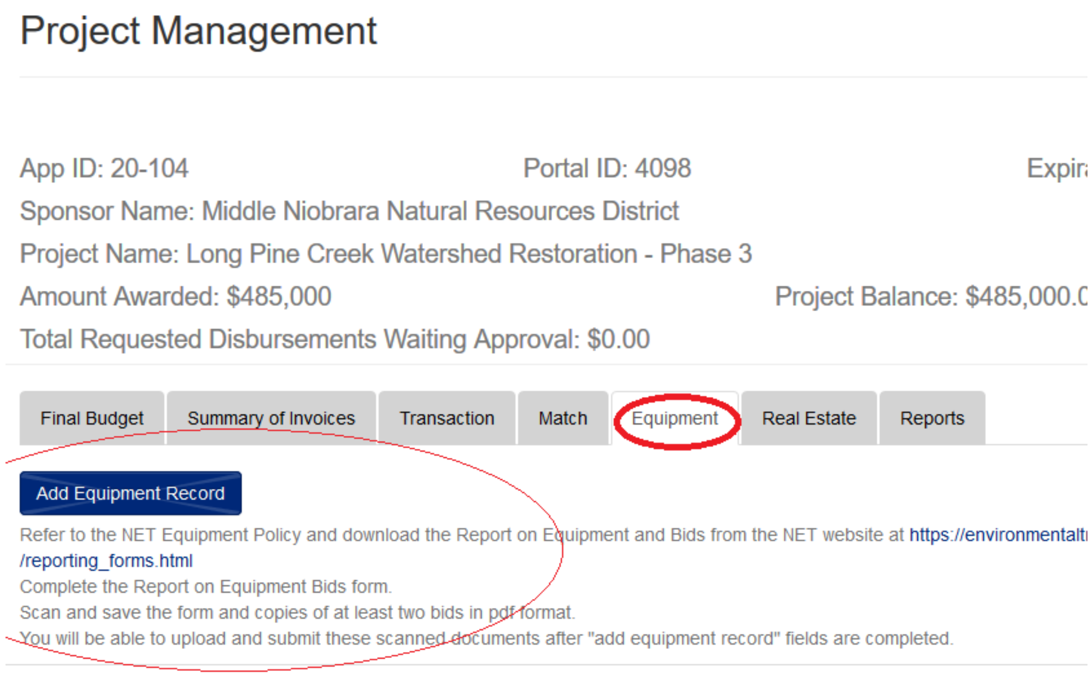
5. Click “Back” to add additional match until you have all match records entered

6. When you have all Match Reports entered and submitted, from the Match Reports tab Print a Match Report for your records. Insure that you have all of the proper documentation of the match in your records.

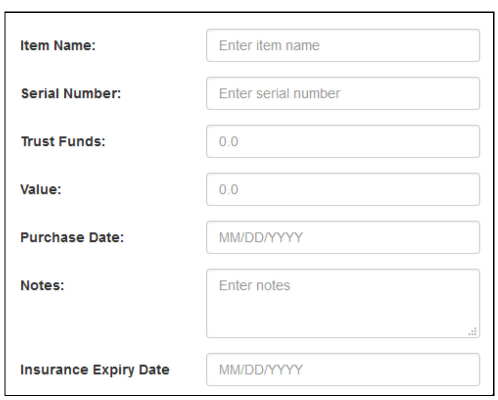
Equipment

If the equipment is part of the reimbursement request, complete the Equipment Record before starting the Disbursement Report. If you are requesting reimbursement FOR ITEMS VALUED OVER $1,000, you must complete an equipment record. Several items valued at $900 each do NOT need to be entered. ONLY INDIVIDUAL ITEMS VALUED OVER $1,000.

1. Click the "Equipment" tab **NOTE THE INSTRUCTIONS** under "Add Equipment Record"



2. Click "Add Equipment Record"
3. Fill out the equipment record. This is the screen you will see.



   a. Fill in the Item,
   b. Serial Number,
   c. Trust Funds requested,
   d. Value of the equipment,
   e. purchase date.
   f. Use the "Notes" section to add pertinent information, i.e. address where the equipment located, who is responsible for the equipment.

4. Click Save .
5. After you have saved an equipment record, the Upload Files. Option is available. Upload a copy of the Completed Equipment bid sheet along with a copy of the bids. Equipment bid form and instructions are located on the NET website at https://environmentaltrust.nebraska.gov/grants/reporting_forms.html

6. NOW you will be able to reference this equipment in a disbursement request. Click Back to navigate to the project.
7. See Summary of Invoices above. When entering the disbursement, to the question **'Does this Disbursement pay for equipment valued over $1,000.00?**" Check the box.
8. Click "Choose Equipment" and click on the Equipment information previously created
9. Click Print in the upper right-hand corner of the screen if you want to save a copy of the pdf.
10. Click "Save"
11. Click "Submit"

IF YOU WANT TO CHANGE THE PRIMARY CONTACT FOR YOUR GRANT, PLEASE USE THE GRANTEE INFORMATION FORM WHEN YOU SUBMIT YOUR 2020 CONTRACT DOCUMENTS. IF YOU HAVE AN EXISTING GRANT, PLEASE EMAIL ALLISON OR ME WITH THE CONTACT INFORMATION YOU WANT USED.