The Nebraska Environmental Trust

preserving NATURAL NEBRASKA™ for future generations

Portal Guidance Document

Contents

CONTACT US AT: 402-471-5409 OR ENV.TRUST@NEBRASKA.GOV

Creating an Account

1. Go to the Portal webpage: environmentaltrustgrants.org
   a. You can bookmark this page in your internet browser for future use.
2. Click on the "Create Account" icon and fill out the information requested

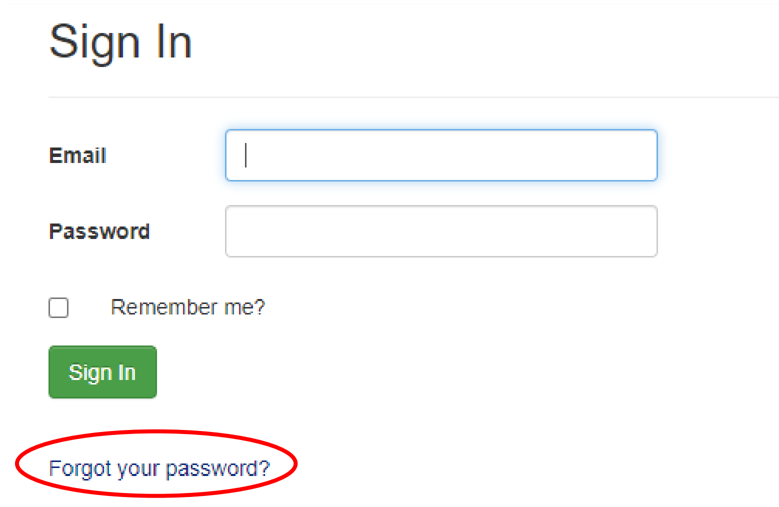
Note: email the Grants Administrator if you were already awarded a grant project. Your information will need to be transferred to your new account.

Logging In

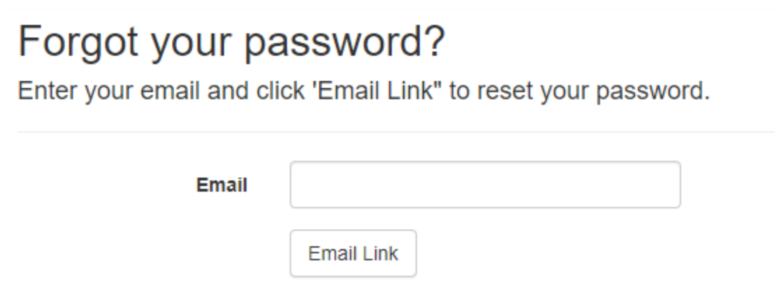
1. Go to the Portal webpage: environmentaltrustgrants.org
2. Enter your email and password and click the Sign In button

Forgot your Password?

1. Click on the "Forgot your Password?" link under the Sign In button.



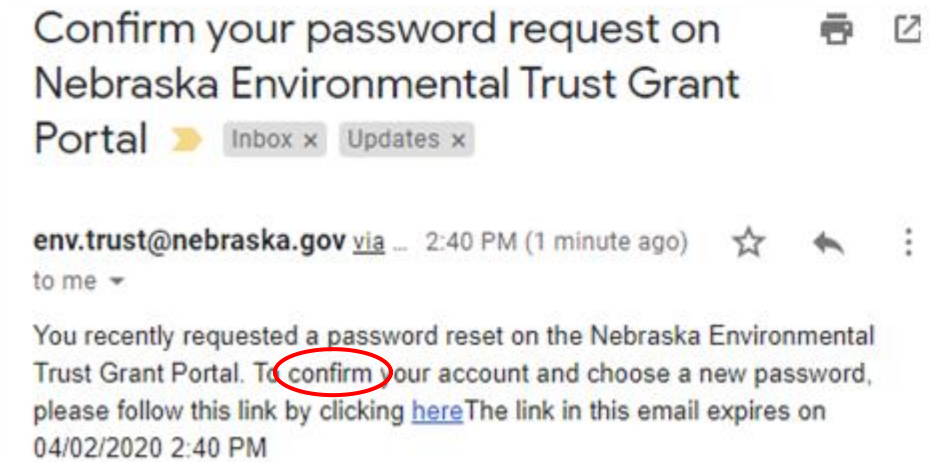
2. Enter your email address and click the Email Link button.



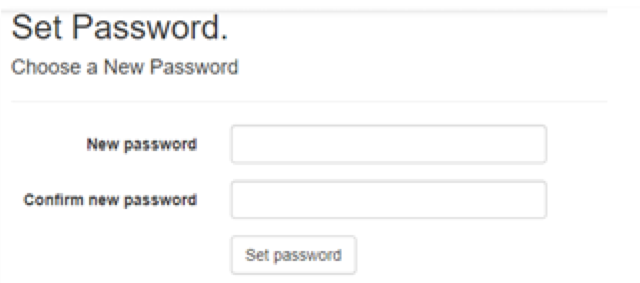
3. You will receive an email from env.trust@nebraska.gov with a link to reset your password.

Note: You may have to wait a few minutes for this email to appear in your inbox. If you do not get an email, check your email spam folder. If you do not receive this email, please call our office.

4. Click the link within the received email.



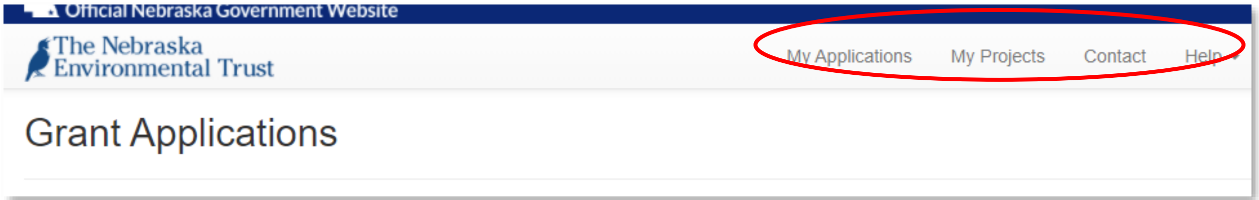
5. You will be taken back to the portal page to create a new password:



<u>**Password Requirements:**</u>

- Must be 8 characters long
- Have at least one numeric character
- Have at least one special character: ! @ # $ % ^ & * _

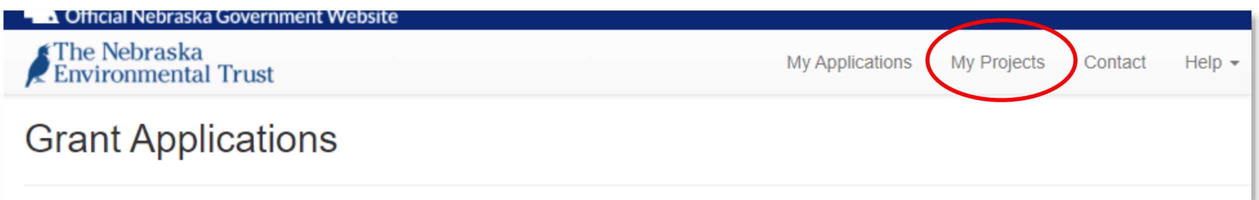
Managing Applications and Grants



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.

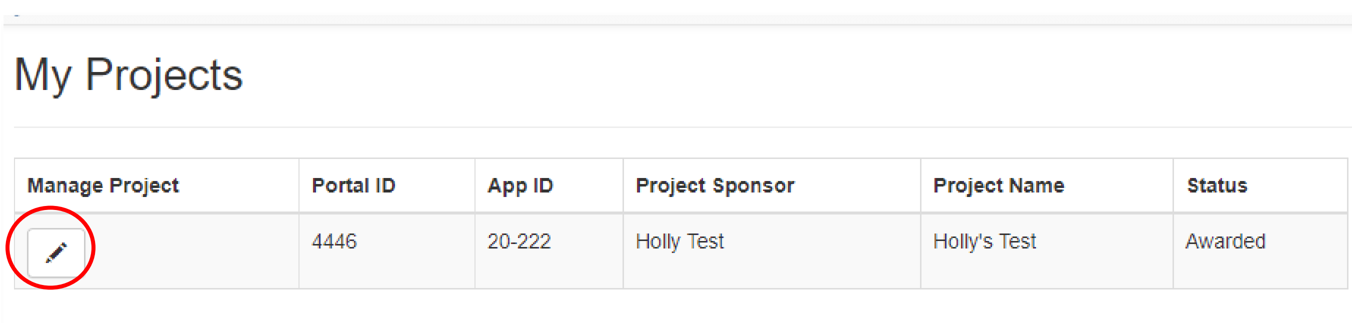
- **My Applications –** List of applications you have created for NET funding.
- **My Projects –** List of approved NET applications. This is what you will choose to manage your awarded grant projects.
- **Contact** – Contact information for NET Staff
- **Help** – FAQs, Standards of Evaluation, and Applications
- **Example@email.com –** If you click on your email you can manage your account's email, password, and contact information.

Managing Awarded Project



1. To manage an awarded project, choose "My Projects" at the top of the screen.

2. The list of awarded projects, that you are the primary contact on, will be displayed. Choose the pencil icon under the "Manage Project" column, for the project



My Projects

Manage Project	Portal ID	App ID	Project Sponsor	Project Name	Status
	4446	20-222	Holly Test	Holly's Test	Awarded

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 below and the following sections.

   a. **<u>Final Budget</u> –** This is where you will enter your budget for your project, manage any updates to your budget, and track your expenditures and remaining balances in your submitted categories. Go to page 6 to learn more.
   b. **<u>Summary of Invoices</u>** – this is where you will upload your invoices and requested amounts for reimbursement of grant funds. Go to page 11 to learn more.
   c. **<u>Transaction</u>** - this is where you will see any transactions that have occurred in your grant (awarded funds, payments, etc.)
   d. **<u>Match</u> –** This is where you will enter your in-kind and cash-match for the grant. Go to page 18 to learn more.
   e. **<u>Equipment</u>** – equipment, valued $1,000 or more, purchased using grant funds will need to be entered in this section and linked to the summary of invoices request for that equipment. Go to page 19 to learn more.
   f. **<u>Real Estate</u>** – Land or easements purchased using grant funds will need to be entered into this section.
   g. **<u>Reports</u> -** This section is where you will submit your quarterly project narratives and final report. Go to page 15 to learn more.

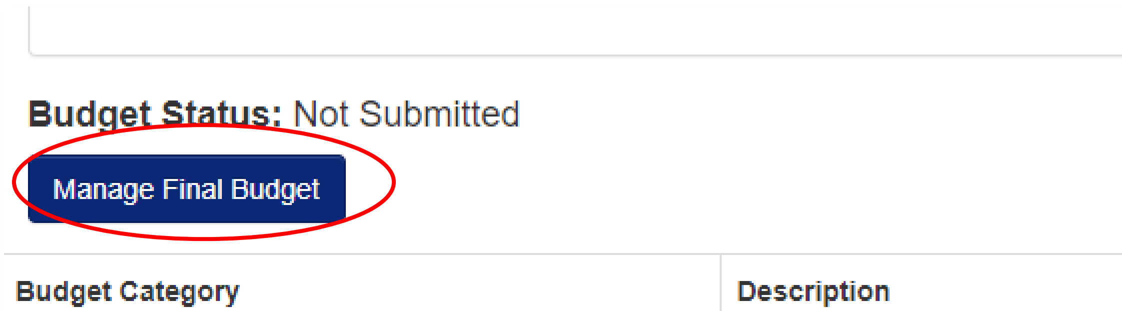
Final Budget

The final budget section will need to be filled out and submitted after each grant award, including 2nd and 3rd years of projects. Your budget will need to reflect the same amounts as proposed on your original grant application, unless your grant award was less than requested.

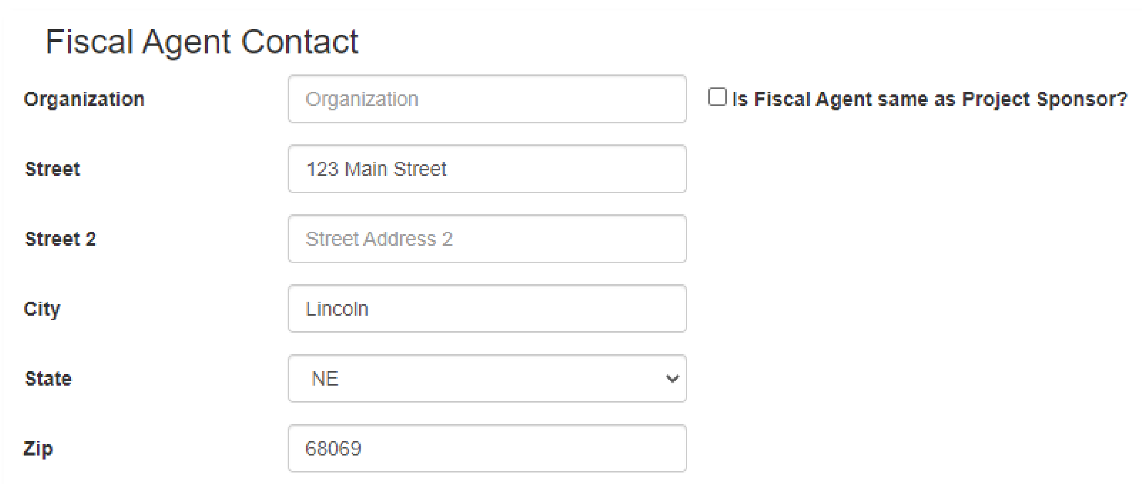
How to Submit your Final Budget – First Year Projects

Note: skip to the next part, for 2nd or 3rd year projects, on page 8.

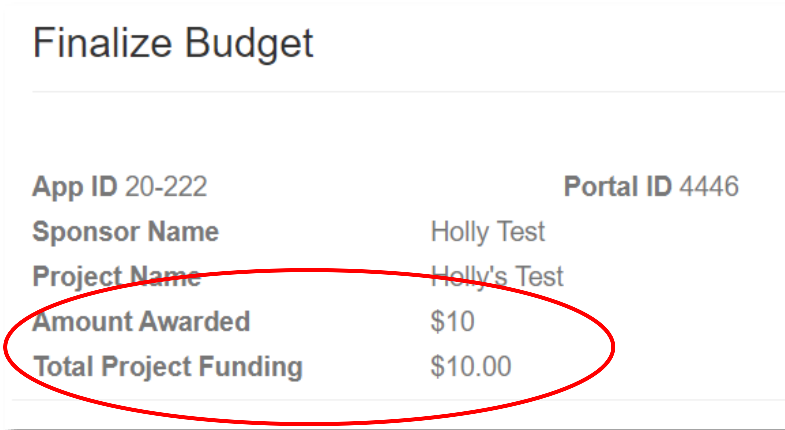
1. Click on the Final Budget tab and then click the Manage Final Budget icon.



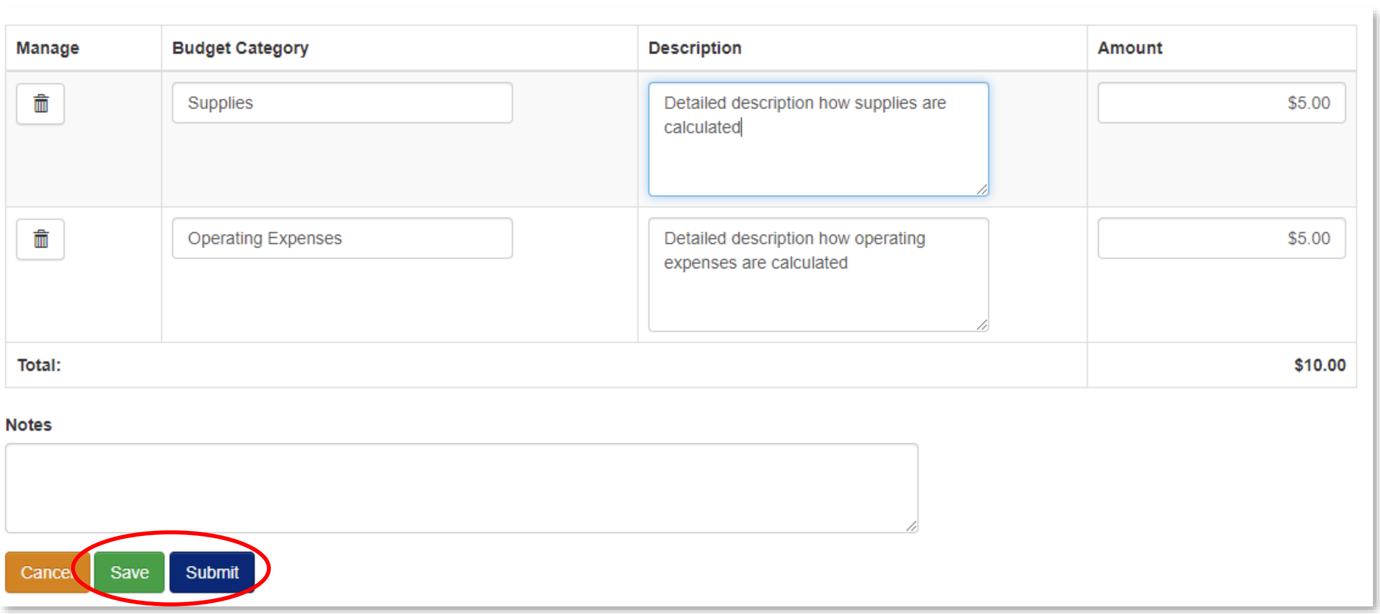
2. Complete the Fiscal Agent Contact information.
    a. If the Fiscal Agent will be the same as the Project Sponsor, check the box next to the Organization.
    b. It is important to complete this section with the same information used when you filled out the direct deposit ACH form. This is what NET will use to send grant payments.
    c. Note: this does not apply to State agencies or the University of Nebraska



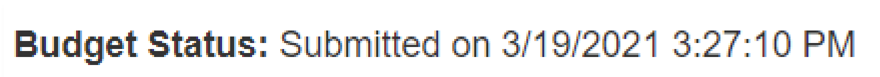
3. Your budget is going to include the budget categories and amounts that was proposed on your application.
    a. Verify that the award amount and total project funding matches.
    b. No changes will need to be made if your award amount was the same as your proposed amount
    c. If your project was awarded less than what was requested on your grant, you will need to modify your budget to reflect the awarded amount.



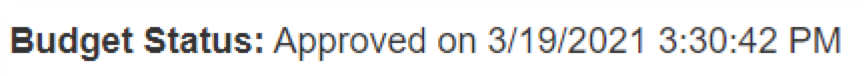
4. When everything is completed, hit the green Save button and then the Submit button
    a. Once you click submit, a box pop up asking you if you're sure you'd like to continue. Click Yes.
        i. If there are any issues with your budget, an error will pop up notifying you of the issue.



5. When your budget has been submitted, your Budget Status will change to submitted.



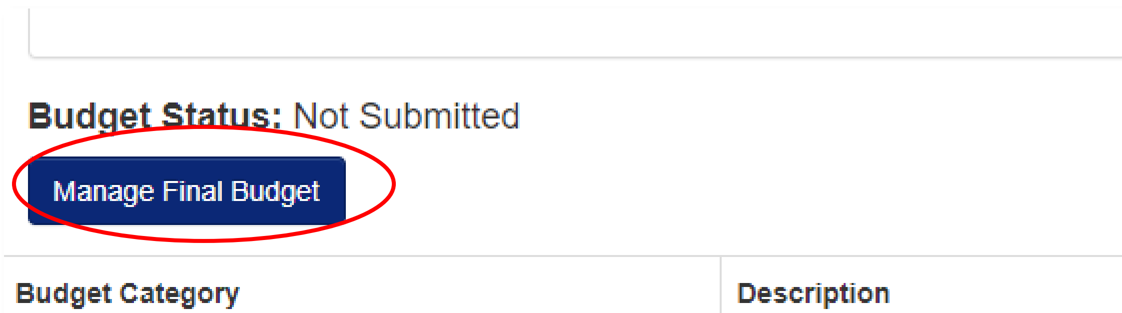
6. Trust staff will review your budget to verify that the amount matches your award amount and if there were any changes made. Once approved, your budget status will change to Approved and you will receive an email notification.
    a. Note: You cannot request any grant funding until the Final Budget has been approved.



How to Submit your Final Budget – 2nd and 3rd Year Projects

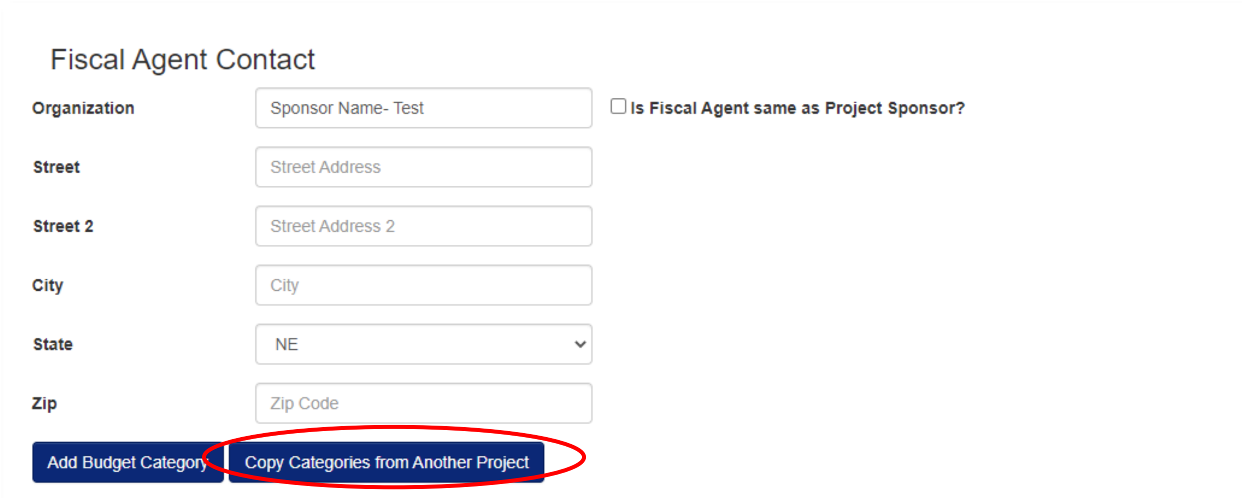
Note: first year projects can skip to page 11.

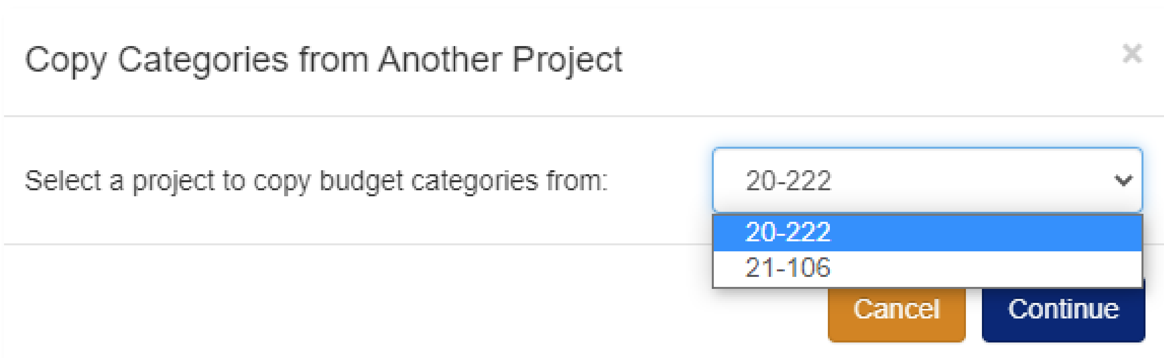
1. Go to the My Projects link at the top of the page and select the newest awarded grant project:
    a. 2nd year projects will have an App. ID number of 20-XXX-2
    b. 3rd year projects will have an App. ID number of 19-XXX-3
2. Click on the Final Budget tab and then click the Manage Final Budget icon.



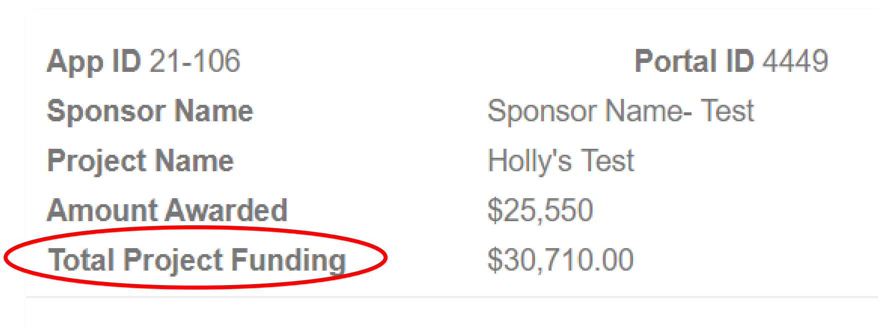
3. Complete the Fiscal Agent Contact information.
    a. If the Fiscal Agent will be the same as the Project Sponsor, check the box next to the Organization.
    b. It is important to complete this section with the same information used when you filled out the direct deposit ACH form. This is what NET will use to send grant payments.
    c. Note: this does not apply to State agencies or the University of Nebraska

THE REMAINING BALANCE FROM THE PREVIOUS YEAR WILL BE TRANSFERRED TO THE NEXT AWARDED YEAR BY NET STAFF.





4. Your budget will not have the budget categories automatically copied over from your previous year. Click on the “Copy Categories from Another Project” icon.
    a. Select the application ID number of your previous grant year from the drop down menu. Click the Continue icon.
    b. A pop up asking you if you’re sure you want to continue will appear. Click Yes.
5. If you had a remaining balance from the previous year, this will be transferred to the next awarded year by NET Staff. Check the Total Project Funding amount at the top of the screen. Your budget will need to equal this amount.



6. When everything is completed, hit the green Save button and then the Submit button
    a. Once you click submit, a box pop up asking you if you're sure you'd like to continue. Click Yes.
        i. If there are any issues with your budget, an error will pop up notifying you of the issue.
7. When your budget has been submitted, your Budget Status will change to submitted.

Budget Status: Submitted on 3/19/2021 3:27:10 PM

8. Trust staff will review your budget to verify that the amount matches your award amount and if there were any changes made. Once approved, your budget status will change to Approved and you will receive an email notification.
    a. Note: You cannot request any grant funding until the Final Budget has been approved.

Budget Status: Approved on 3/19/2021 3:30:42 PM

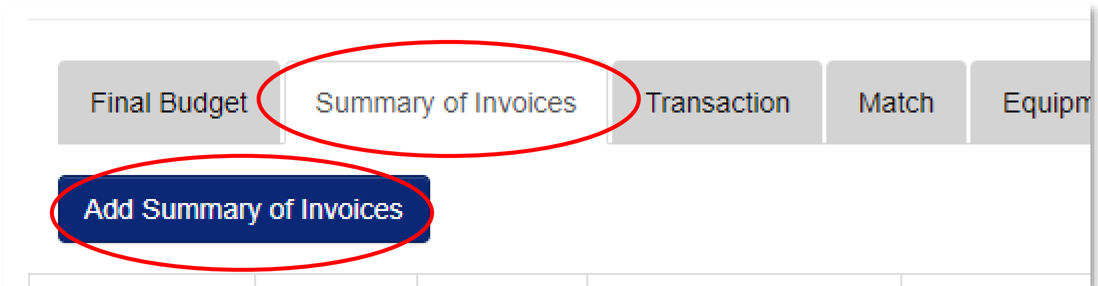
Summary of Invoices

The Summary of Invoices is where you will upload your invoices and requested amounts for reimbursement of grant funds.

If you're requesting equipment, valued at $1,000 or more, please go to page 19 for instructions.

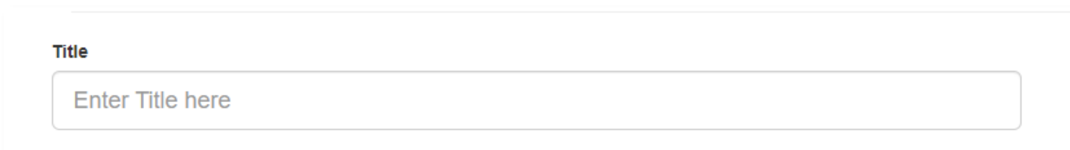
1. Click on "My Projects" in the gray bar at the top, right of the screen. Choose your grant.

2. Click the Summary of Invoices tab and then click Add Summary of Invoices

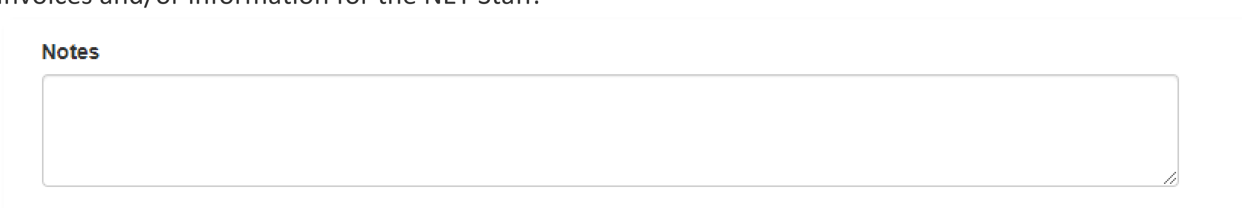


YOU CAN SAVE AT ANY TIME AND COME BACK TO THE SUMMARY OF INVOICES. USE 'SAVE' OFTEN

3. Enter a title of your request at the top of the page. The title should be how you and NET will reference this reimbursement request, i.e. "Jan-Mar 2020"



4. You can use the "Notes" area to add information for your use while preparing the Summary of Invoices and/or information for the NET Staff.



5. Click "Add a Line" for each invoice you want reimbursed and fill in the following information:
   a. Fill in the date of the invoice (this is not the date it was paid, but the actual invoice date)
   b. Vendor/Supplier
   c. A description of the invoice/services

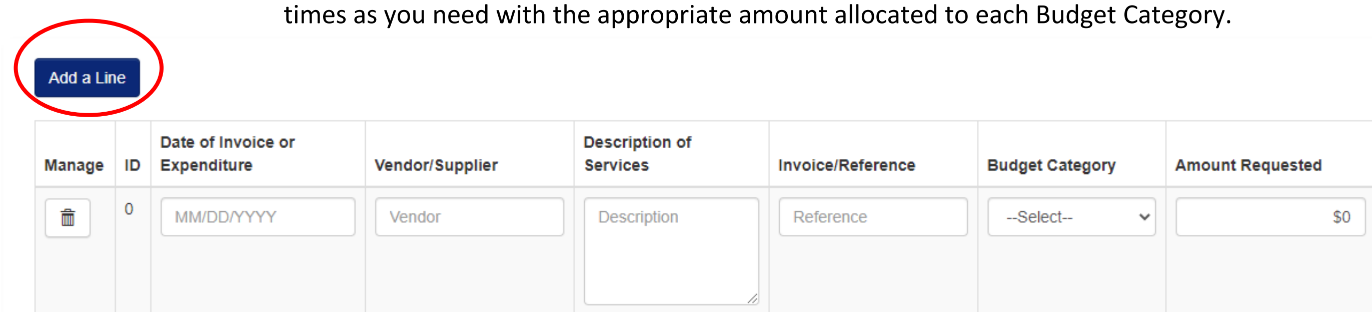
d. Invoice/Reference: the file name of the pdf you're attaching so we know what to look at for the expense.

e. Select the Budget Category that will be used to pay the invoice

f. Enter the Amount Requested for the invoice

  i. **NOTE: If the amount requested is different than the amount on the invoice, please write the amount requested on the uploaded invoice.**

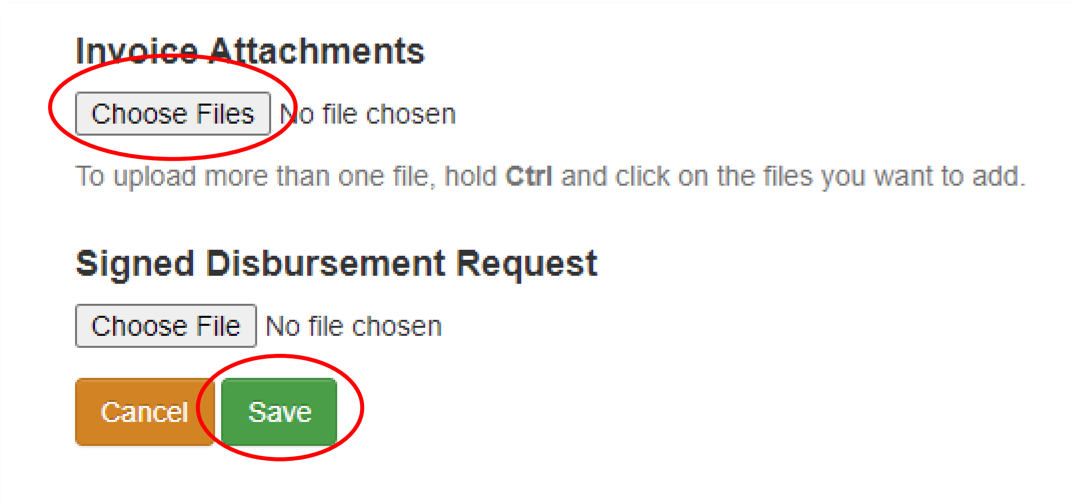
  ii. If one invoice needs to be split between budget categories, list the invoice as many times as you need with the appropriate amount allocated to each Budget Category.



6. After you have entered all of your invoice/receipts requested, click the save icon at the bottom of the page.

7. Once you have clicked save, an upload icon will appear under the instructions box.
   a. Before uploading, name the files clearly to identify the line it is associated with

8. Click the Upload Files icon.
9. Click the "Choose Files" icon, below the **Invoice Attachments** heading, and upload the files for your requested amounts
   a. Only pdf's can be uploaded
   b. Upload each file and click Save
   c. If you uploaded the wrong file, you can delete the file and make the correction.



10. Once all of your files have been uploaded, click the "**Print Report to Sign**" icon at the upper right side of the screen.
    a. This will create the cover sheet, which will include all the information needed for NET staff to process your payment for your request.
    b. You can save this file by changing your printing destination to "Save as PDF". You can then digitally sign this file.
    c. If you're unable to digitally sign this you can print, sign, and scan this cover sheet as a pdf.

11. Click on the upload files icon under the **Signed Disbursement Request**, choose the pdf file of the signed document, and click Save.
    a. **NOTE: It is required to upload the signed disbursement report to Submit. You will get a submission error if the signed disbursement form is not attached.**

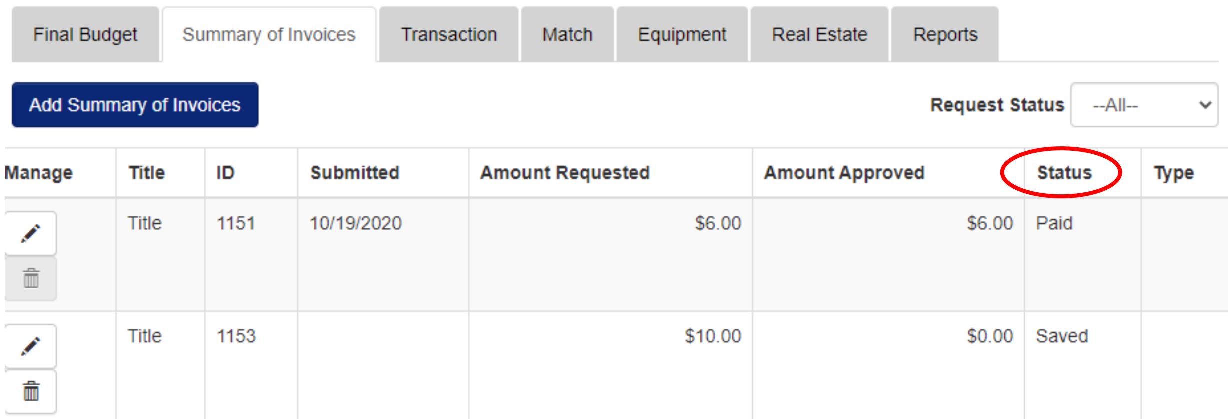
12. Once you have everything completed, click the submit icon at the bottom of the screen.

13. If you receive a submission error stating that your have exceeded one of your budget categories, review your remaining amounts under the Final Budget Tab.
    a. Go to page 21 to learn more about Budget Modifications.

14. You can check the status of your request by going back to the Summary of Invoices tab.
    a. **Saved:** If the status says "Saved" the request was not sucessfully submitted. Go back and click the submit icon again
    b. **Pending:** If the request is marked pending, the NET Staff has started to review your submission

c. **Approved:** If it is marked approved, the request has been sent on for your payment to be processed

d. **Paid:** Your request has been processed and you should now see your payment in your bank acocunt


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

Add Summary of Invoices

Request Status --All--

Manage	Title	ID	Submitted	Amount Requested	Amount Approved	Status	Type
	Title	1151	10/19/2020	$6.00	$6.00	Paid	
	Title	1153		$10.00	$0.00	Saved	

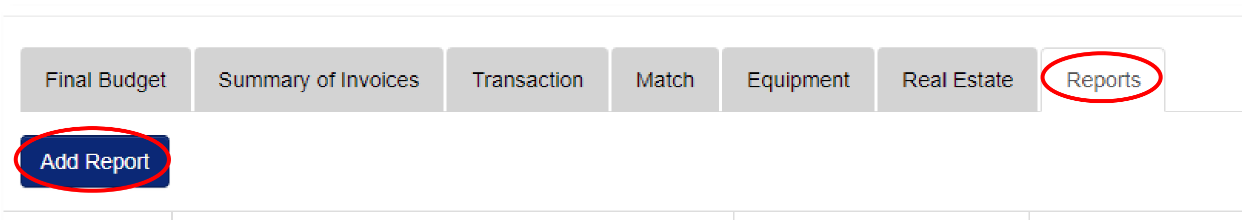
Reports

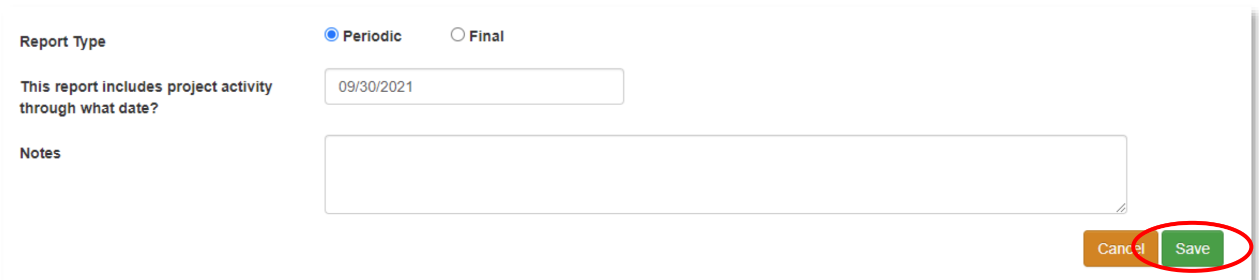
You will use this tab to submit the quarterly narrative report and to submit final reports at the end of the grant. Reports are due 30 days after the end of each quarter.

Project Period	Report Due Date
From inception - September 30th	**October 31st**
October 1st - December 31st	**January 31st**
January 1st – March 31st	**April 30th**
April 1st – June 30th	**July 31st**

YOU CAN ONLY CREATE ONE REPORT AT A TIME. IF YOU NEED TO SUBMIT MORE THAN ONE, YOU WILL HAVE TO WAIT UNTIL ONE IS APPROVED BY STAFF IN ORDER TO CREATE THE NEXT ONE.

1. Click on the Reports tab
2. Click Add Report and fill out the following information. Once completed click Save.





a. **Report Type:** This will need to be Periodic for quarterly reports. Final will only be used when your project is completed.
    i. **Final Report-** if you're submitting your final report, please read the instructions listed once "Final" is selected here.

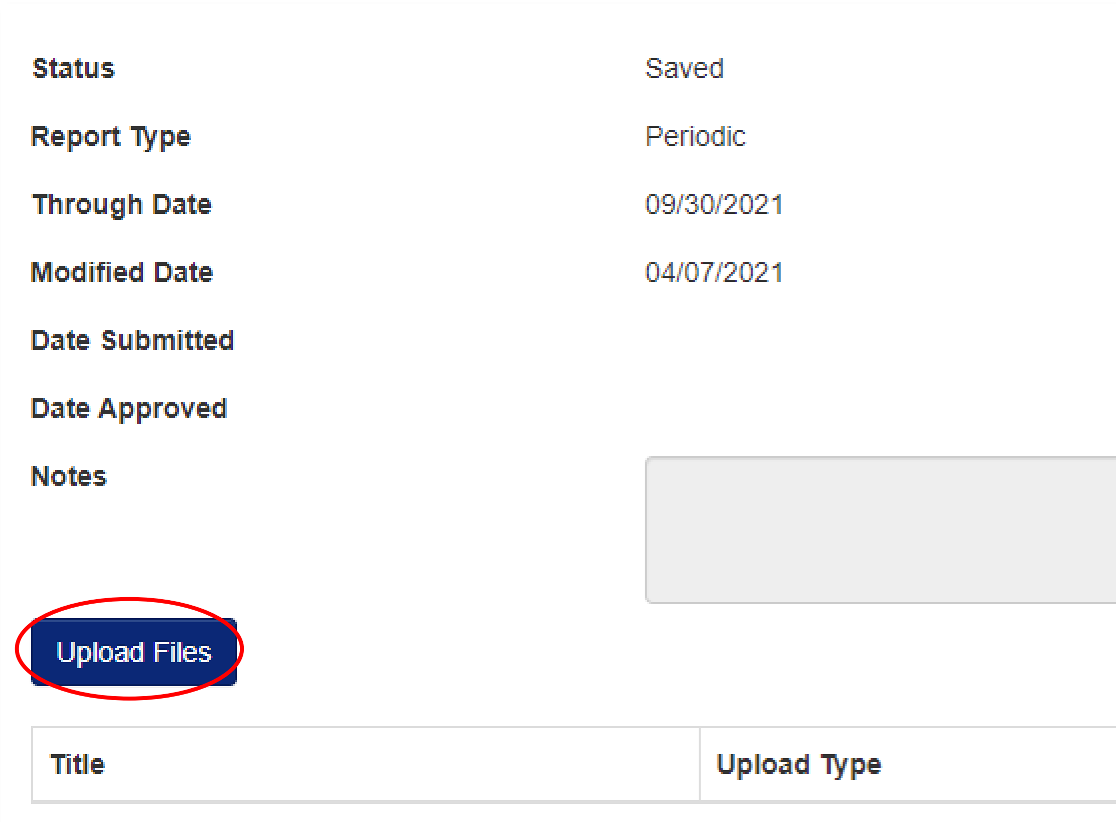
b. **This report includes project activity through what date? –** You will put the end of the quarter date in this box. For example: the 1st quarter report goes through September 30th.

c. **Notes:** You can any notes to the Staff in this box. This box is NOT for your narratives.

3. If you click save and have to make edits to this section later on, click the blue edit icon on the next screen.

4. At the top of the page, click: 

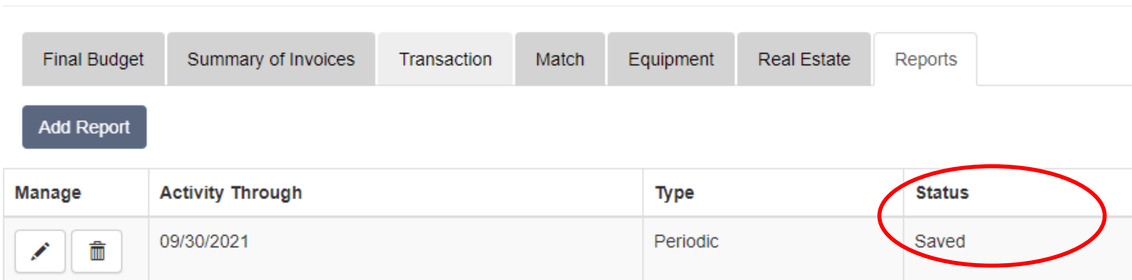
    a. You will need to sign this document and upload it with your project narratives.



5. Your project narratives will need to be uploaded as a pdf document. To upload the cover sheet and your project narratives, click on the Upload Files icon.
    a. Then click the "Choose Files"
    b. Once your file has been uploaded, click Save. This will take you back to your previous page.
    c. Click the green Submit icon when completed.

6. You can check the status of your report by going to the Reports tab.

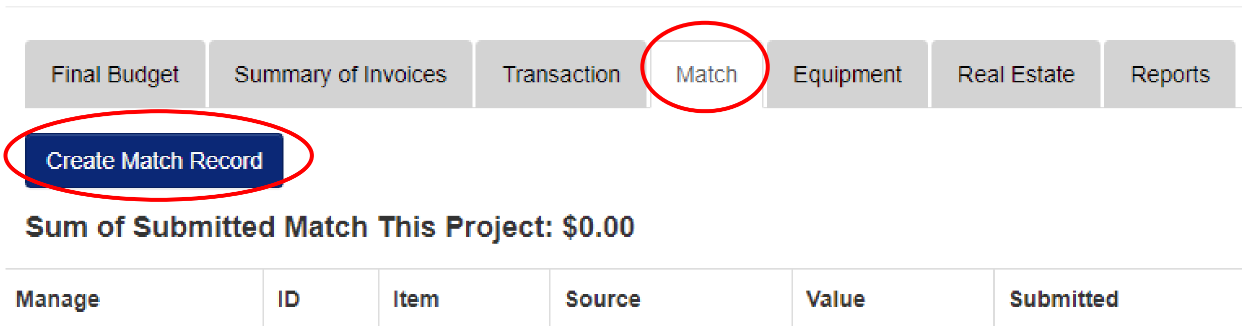
a. **Saved:** If the status says “Saved” the request was not sucessfully submitted. Go back and click the submit icon again.
b. **Submitted:** Your report has been submitted and will be reviewed by NET staff.
c. **Approved:** Your report has been approved by NET staff. You should receive an email notification stating this.



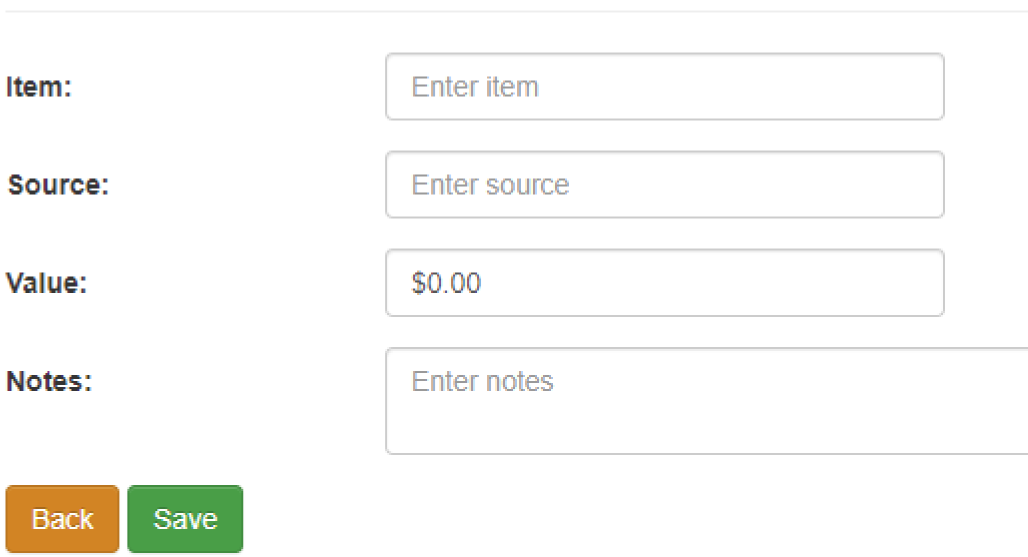
Match

The match tab is used to report any match that has been acquired during each quarter. The proposed budget on your application will be used for your match budget. If fully funded, you are required to meet the application amount proposed as match. If you were not fully funded, contact the Grants Administrator on your required match amounts.

No documentation is required when reporting match, however, it is required that you keep documentation on file in case of a future audit of your grant.



1. Click on the Match tab.
2. Click on Create Match Record.
    a. A match record line will need to be created for each matching item.



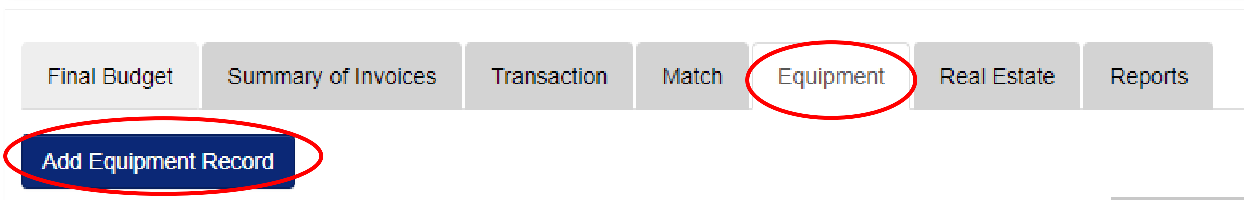
    b. **Item:** What is the matching item? Example: Fuel for work Truck
    c. **Source:** Where the match came from/who paid for it
    d. **Value:** Amount of the match
    e. **Notes:** Any additional information you would like to add.
3. Once completed, click Save.

Equipment

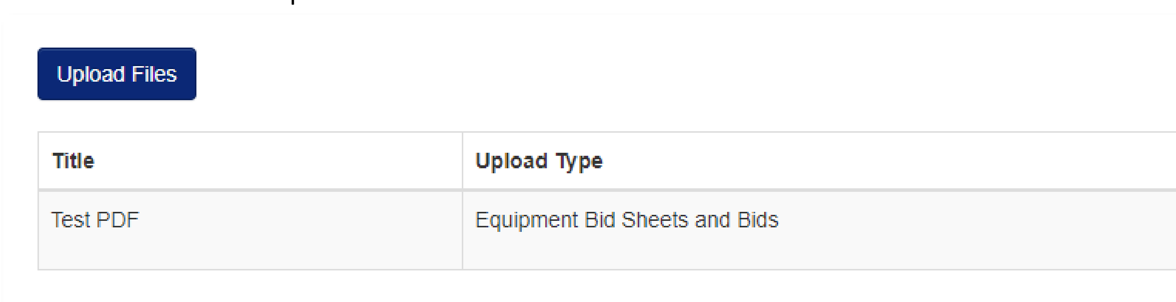
If you're purchasing equipment or items valued $1,000 or more, you must complete an equipment record.

You must complete the entry in the Equipment tab before starting the Disbursement Report.

1. You will need to complete the Equipment Bids form located here: https://environmentaltrust.nebraska.gov/grants/reporting_forms.html
2. Click on the Equipment tab
3. Click the "Add Equipment Record"



4. Fill out the information:
    a. **Item Name:** Please put the make and model of your item.
        i. For example: 2008 John Deere X325 Tractor
    b. Serial Number
    c. **Trust Funds:** the amount of Trust funds used towards the grant
    d. **Value:** The total cost of the equipment
    e. Purchase Date: invoice date
    f. **Notes:** Any other pertinent information can be added here, such as the address the equipment is located.
5. Click Save.
    a. Note: if you need to go back and make edits on this information, you can click the blue Edit icon on the next page.
6. Click on the Upload Files icon and upload the following:
    a. The Equipment Bids form
    b. The complete 2 bids for the item

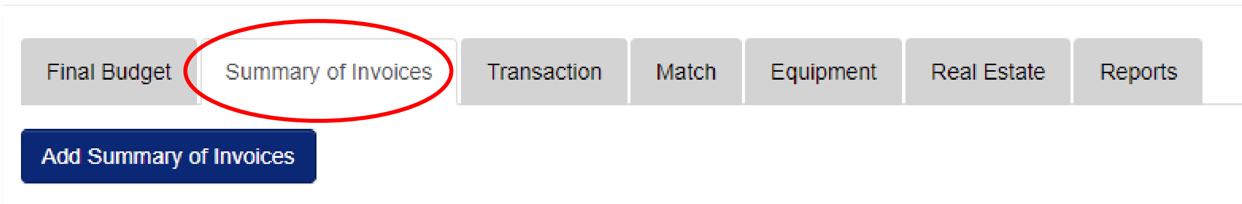


7. When finished, click the green Submit icon at the top of the screen.

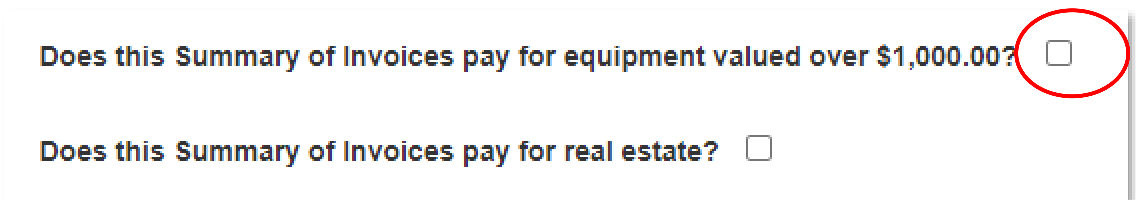
How to link your Equipment to your Summary of Invoices

Once you have completed your Equipment tab entry, you can link the equipment in your Summary of Invoices request.

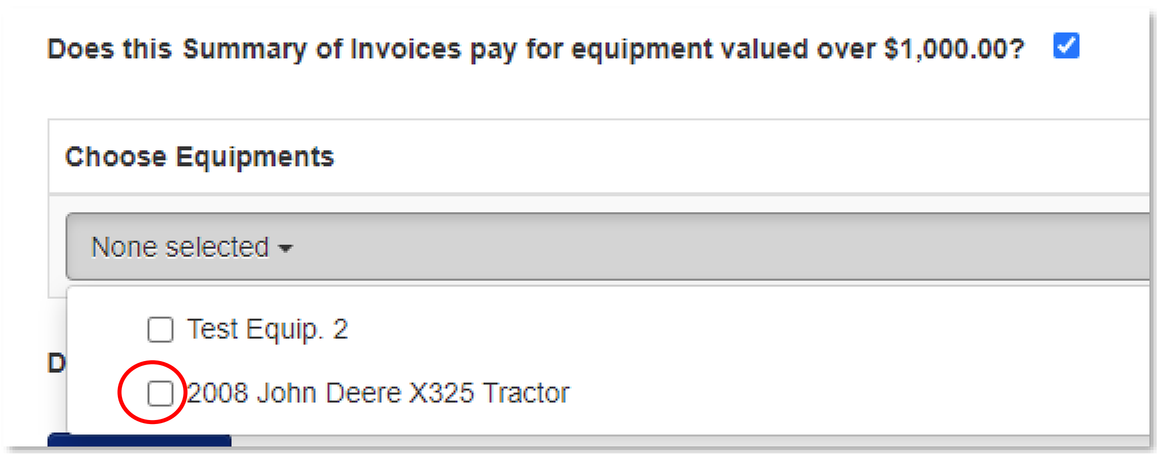
1. Go to your Summary of Invoices tab and click on the Add Summary of Invoice icon or click the manage icon, if you already started an entry.



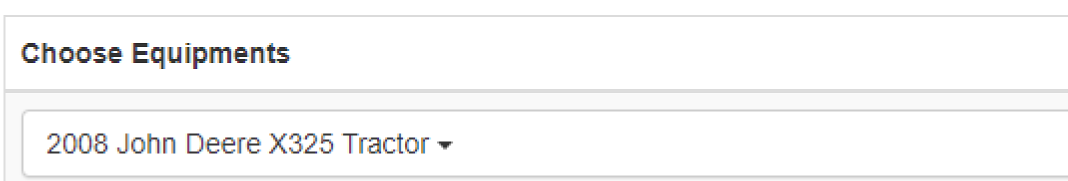
2. Under the notes section, check the box on the question: **Does this Summary of Invoices pay for equipment valued over $1,000.00?**



3. When checked, a drop down menu will appear. Select your equipment from this drop down. Note: if you have more than one item to link, you can check multiple boxes.



4. Your selected equipment should now appear in that menu



How to Request an Extension or Budget Modification

Extensions

If you think you are unable to complete your project in the awarded timeframe, an extension can be requested.

You will need to email NET Staff with the following information for your request:

1. Application number and project name
2. How long of an extension is needed (6-months or one-year)
3. The reason for the extension
4. If you will be able to complete your project as it was originally proposed with the new timeline

Your request will either be reviewed by NET staff or the NET board. If approved, staff will notify you of the decision and update the expiration date in the portal.

Budget Modifications

If you need to make changes to your budget you will need to submit a request to NET staff. This request can be sent via email

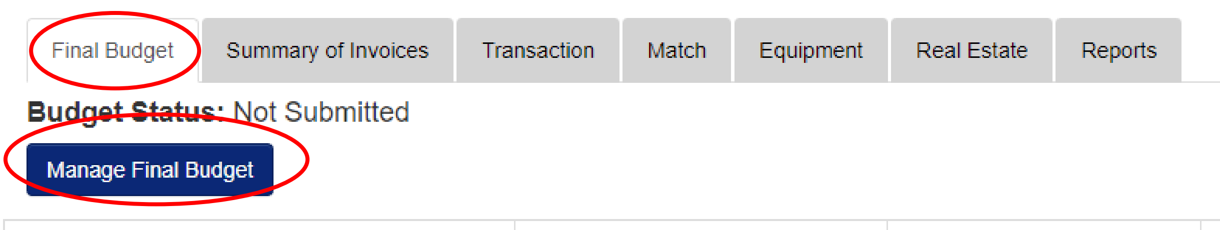
Include the following:

1. How much grant funds you want to move and from which categories
2. The reason the modification is needed
3. If your project will still be completed as proposed with this modification

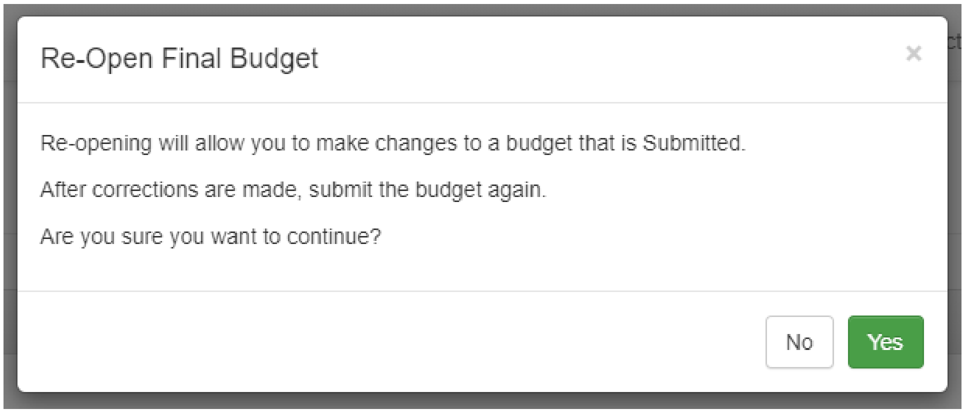
Depending on how much funds are being moved, your request will either be reviewed by NET staff or the NET board. You will be notified of the decision. If approved, you will need to follow the next steps to edit your budget.

How to Edit your Budget after an Approved Modification

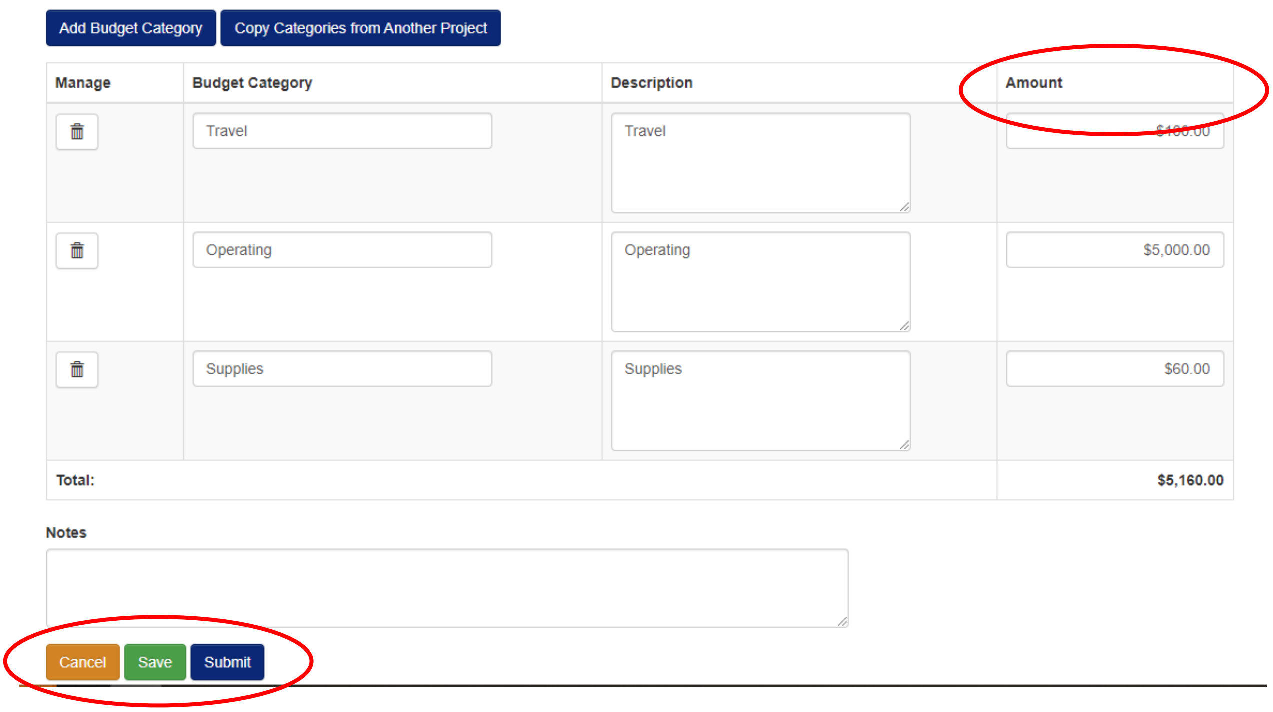
1. NET Staff will withdraw your original approved budget for you to make edits
2. Go to the Final Budget tab
3. Click on the "Manage Final Budget" icon



4. This will take you to a different screen. Then click on the “Re-Open” icon. A pop-up will appear asking you if you’d like to continue. Click yes.



5. The Amount column is the original beginning balance. Update this column to reflect your approved request.
6. Once updated, click the save icon and then submit.



7. NET staff will review your submission and contact you if there are any issues. If there are no issues, you will receive an email notification when your budget has been approved.
    a. Note: you will be unable to create any new disbursement requests until your budget has been approved.