Vermont Community Development Program

Navigating GEARS & Opening an Application

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Learning Objectives

- Understand what GEARS is and what it is used for
- Understand how GEARS is structured for the purposes of VCDP
- Learn strategies for navigating through GEARS

What is GEARS?

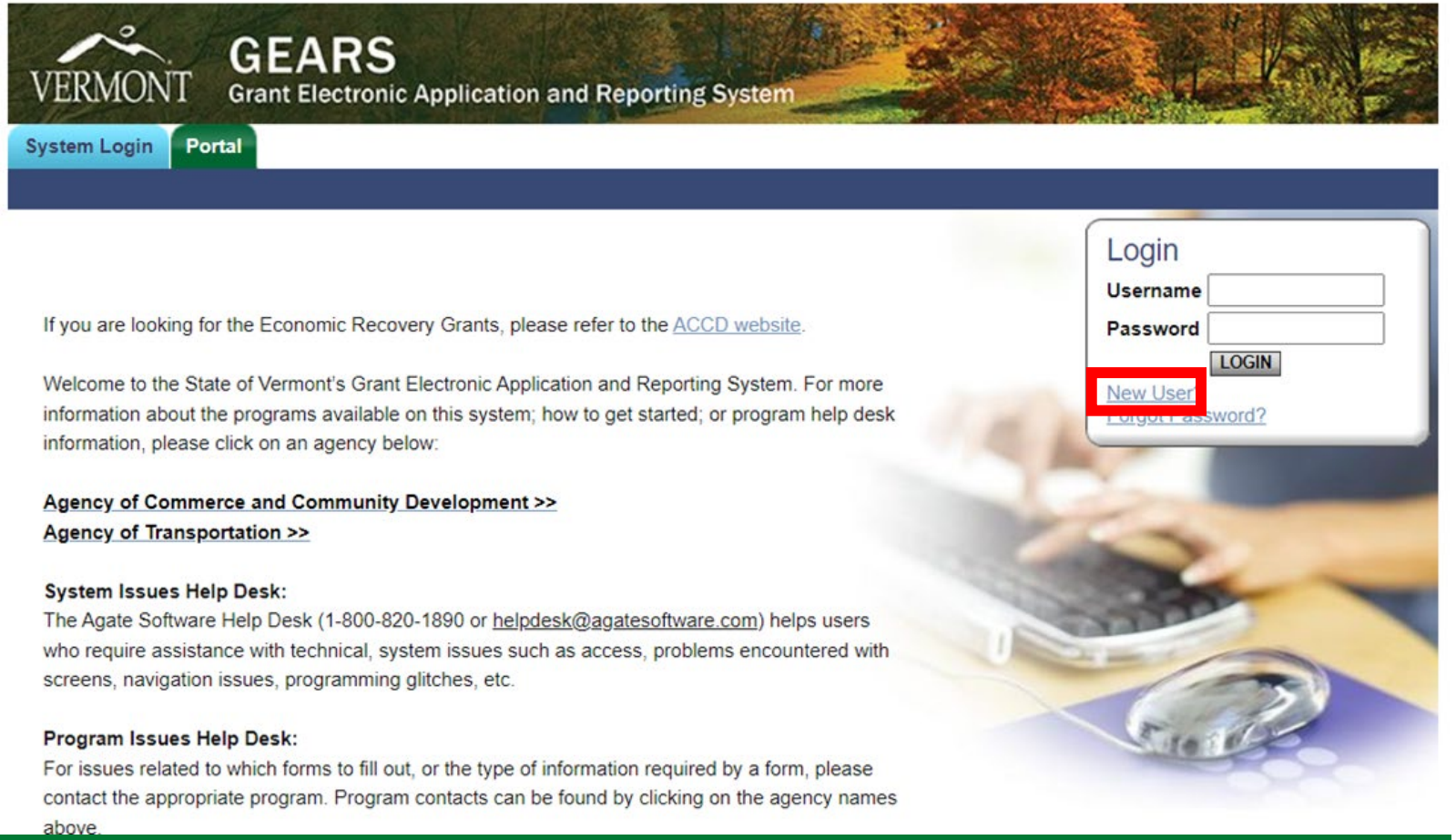
- Online grants management system used by multiple State programs and across multiple State Agencies.
- VCDP's entire grant process is managed through GEARS:

  - ❖ Applications
  - ❖ Environmental reviews
  - ❖ Davis-Bacon reporting
  - ❖ Execution of the grant agreement
  - ❖ Requisitioning
  - ❖ Progress reports
  - ❖ Monitoring
  - ❖ Single audit
  - ❖ Closeout agreement
  - ❖ Closeout financial reporting

Gaining Access to GEARS

1. Municipality needs to know about the project and who the players are.
2. Only the Municipal Authorizing Official (MAO), Administrator (Admin) or Administrator/Financial Officers (Admin/FO) attached to the organization can create an application or environmental review (ER) for a project.
3. The MAO, Admin or Admin/FO at the municipality needs to email VCDP staff with the identifier(s) of the application and ER, with the names and roles of each individual needing access.
4. Users typically only need one account.
5. All MAO's and new users must be validated by VCDP staff.

New Users



- Log onto GEARS site: https://egrants.vermont.gov
- Click on "New User" and complete account information and select the program you are working with and save.
- ACCD staff from the selected program will receive a notice the account has been created.
- VCDP staff do not validate accounts until an email is received by the municipality granting permission.

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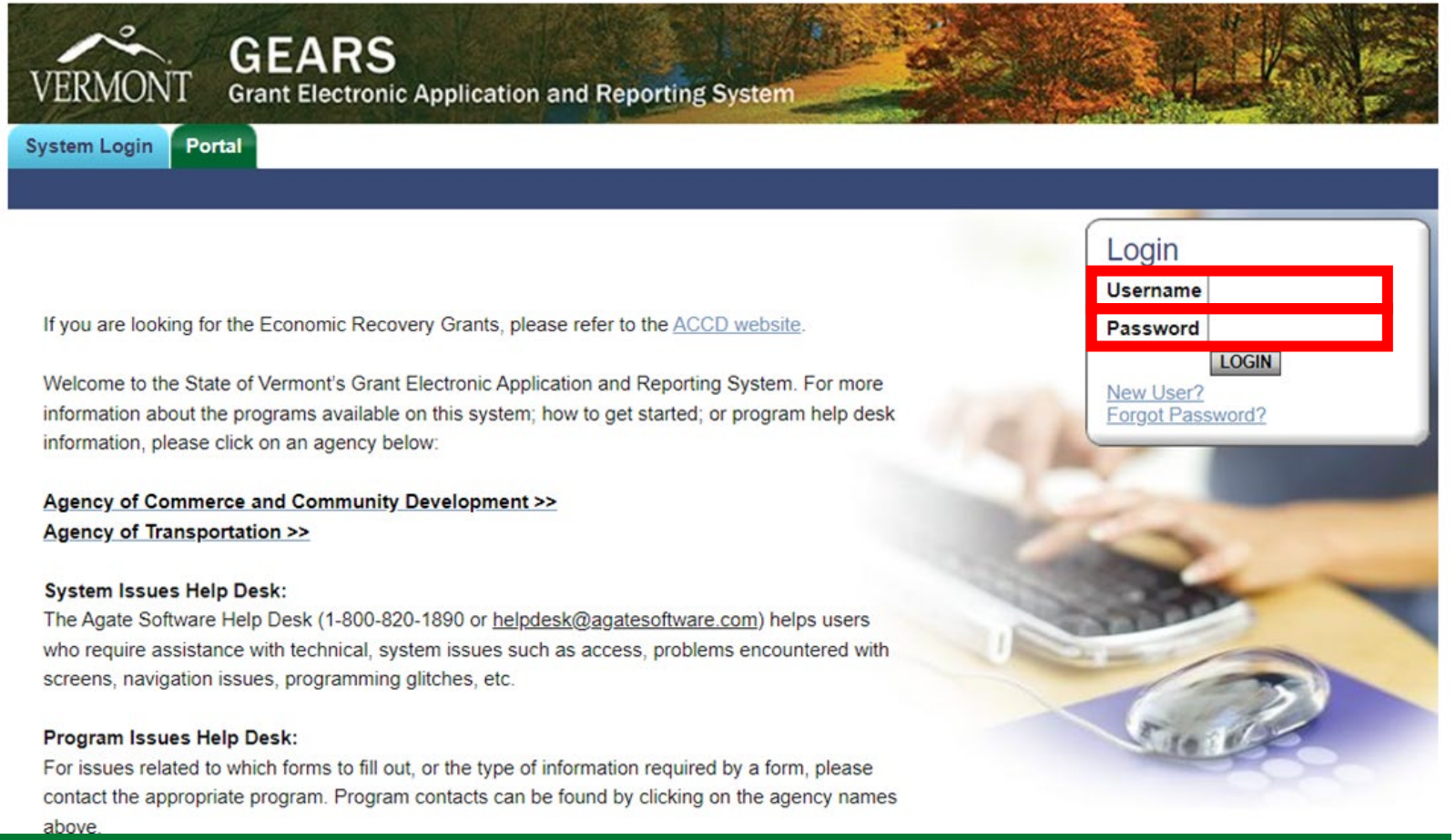
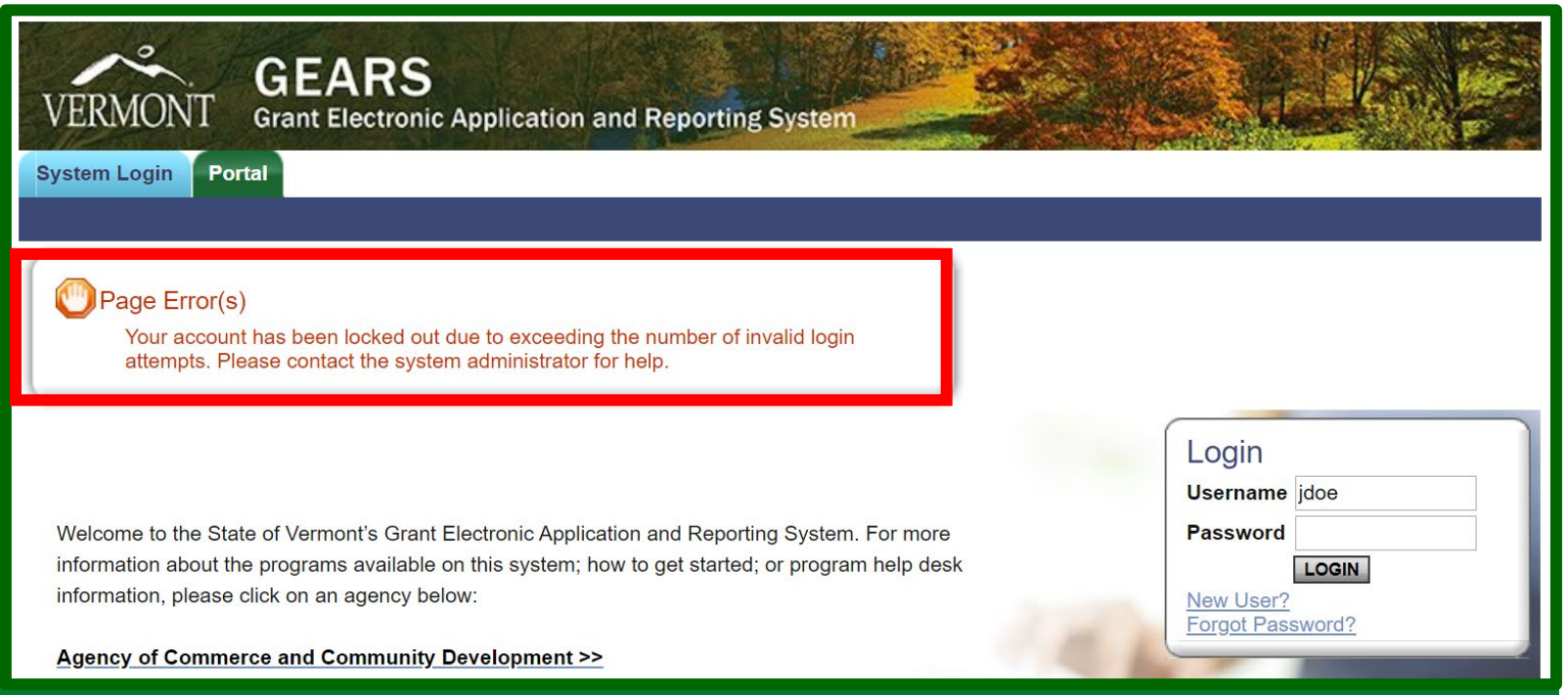
Logging On



- Log onto GEARS site: https://egrants.vermont.gov
- Enter in the “Username” and “Password” for the account created.
- Click on the grey “Login” button.

Getting Locked Out/Forgot Password



- 3 incorrect password entries
- Wait 20 minutes and try again

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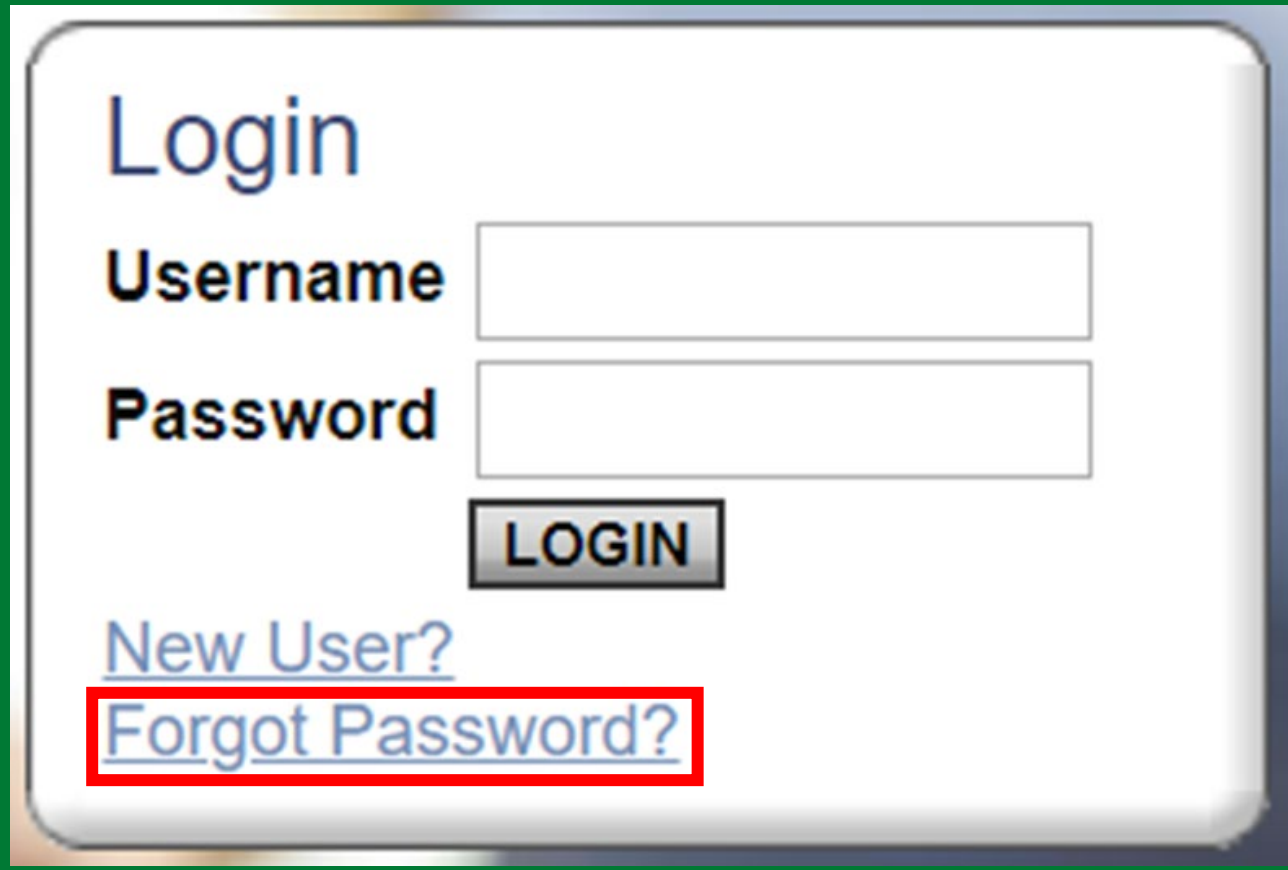
Getting Locked Out/Forgot Password

- Forgotten your password, select the “Forgot Password?”
- Enter email and username associated with the account
- A temporary Password will be sent to the email account



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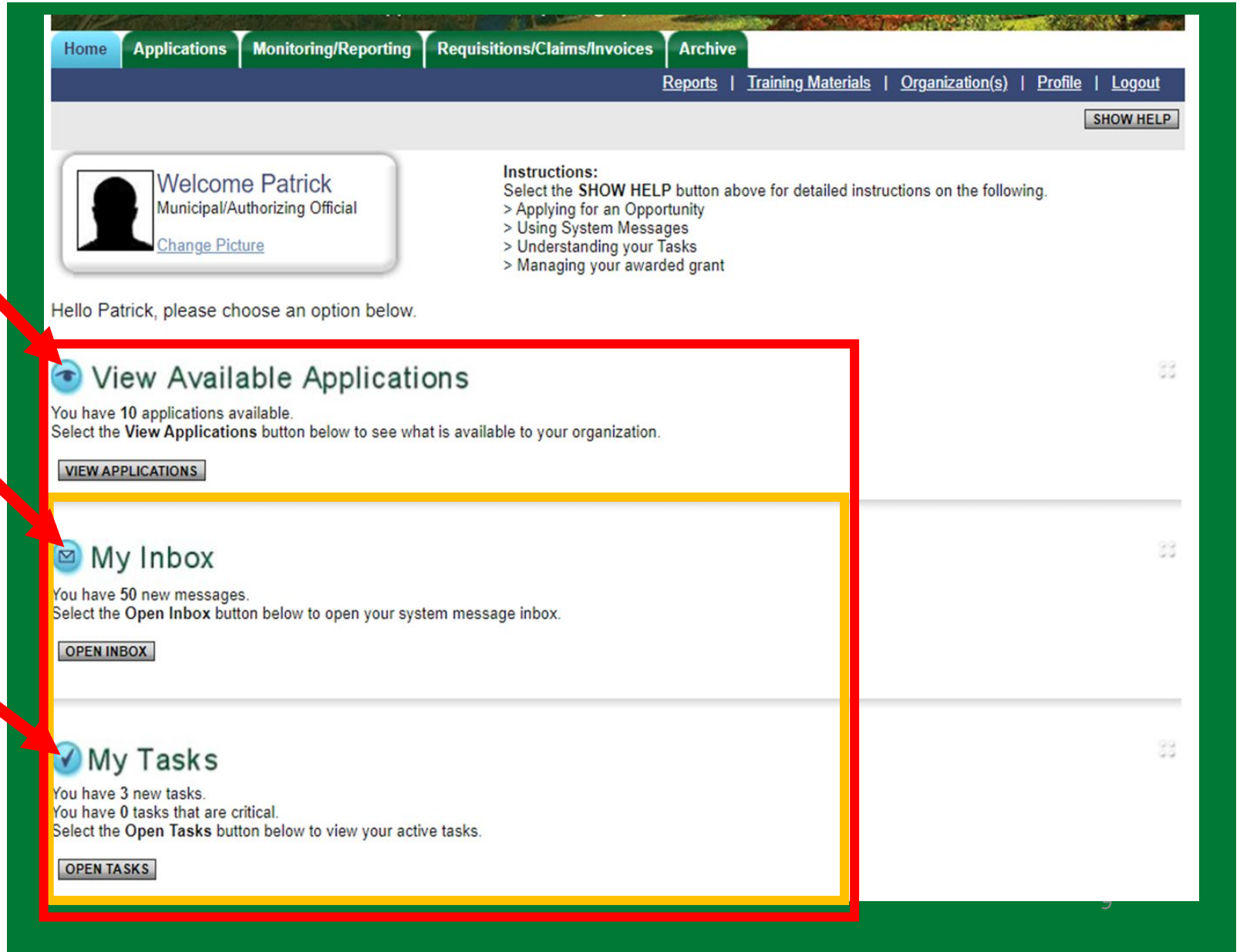
GEARS Main Home Screen

- View Available Applications
  Only MAO's and Admin's and Admin/FO's at the Organization level see
- My Inbox
  All system notifications sent
- My Tasks
  Open applications, ER's requisitions, PR's etc. that are open and/or something needs to be completed.



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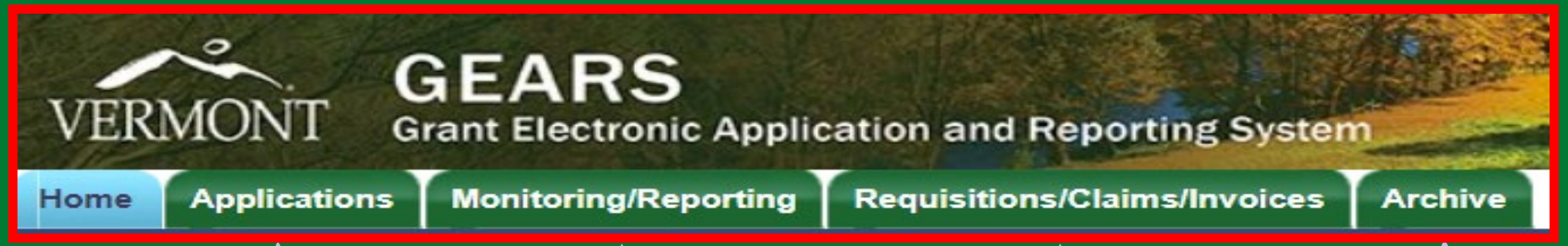
Options Available Under Each Tab



VCDP Applications/ Awarded Grants & Environmental Reviews

Closeout Agreements, NCDO, Closeout Financial Reports, Onsite Monitoring Reports, Progress Reports, Audits

VCDP Requisitions

All 2007 -2011 VCDP Applications/ Awarded Grants Requisitions Progress Reports Onsite Monitoring Reports 2007 -2012 Environmental Reviews

Object Labeling: Applications

07110-IG-2018-Bennington-05

ACCD Code for VCDP

Application Type

- IG: Implementation Grant
- PG: Planning Grant
- AM: Accessibility Modification
- SS: Scattered Site

Program Year of Application

Municipality or Organization

Unique Identifier #
(assigned by the system at the time the application is created)

Object Labeling

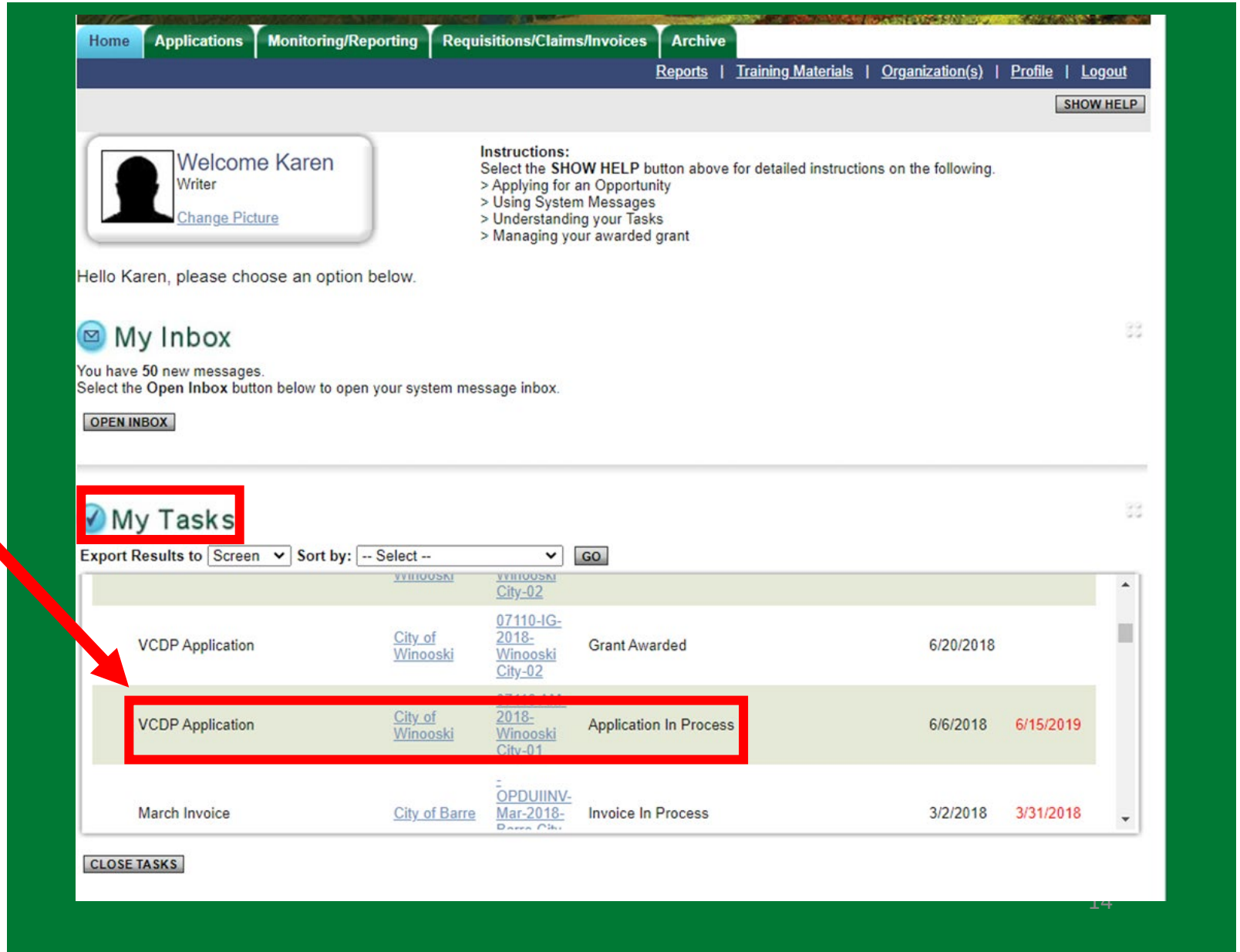
- Applications/Awarded Grants → 07110-IG-2018-Bennington-05
- Environmental Reviews → ENV-2018-Bennington-010
- Requisitions → REQ-2018-Bennington-00028
- Onsite Monitoring Reports → OSMR-2018-Bennington-00005
- Progress Reports → PR-2018-2-Bennington-00010
- Davis-Bacon → DBCP-2018-Bennington-00002

Object Labeling

- Single Audits → SA-2017-Montpelier City-00006
- Closeout Agreements → CL-2007-Montpelier City-00056
- Closeout Financial Reports → CFR-2017-Montpelier City-00329
- NCDO Agreements (by organization) → CHT-00003

Searching for Applications

- Home Tab My Tasks
  Expand and you will see open applications, ER's requisitions, PR's etc. that are open and/or something needs to be completed.



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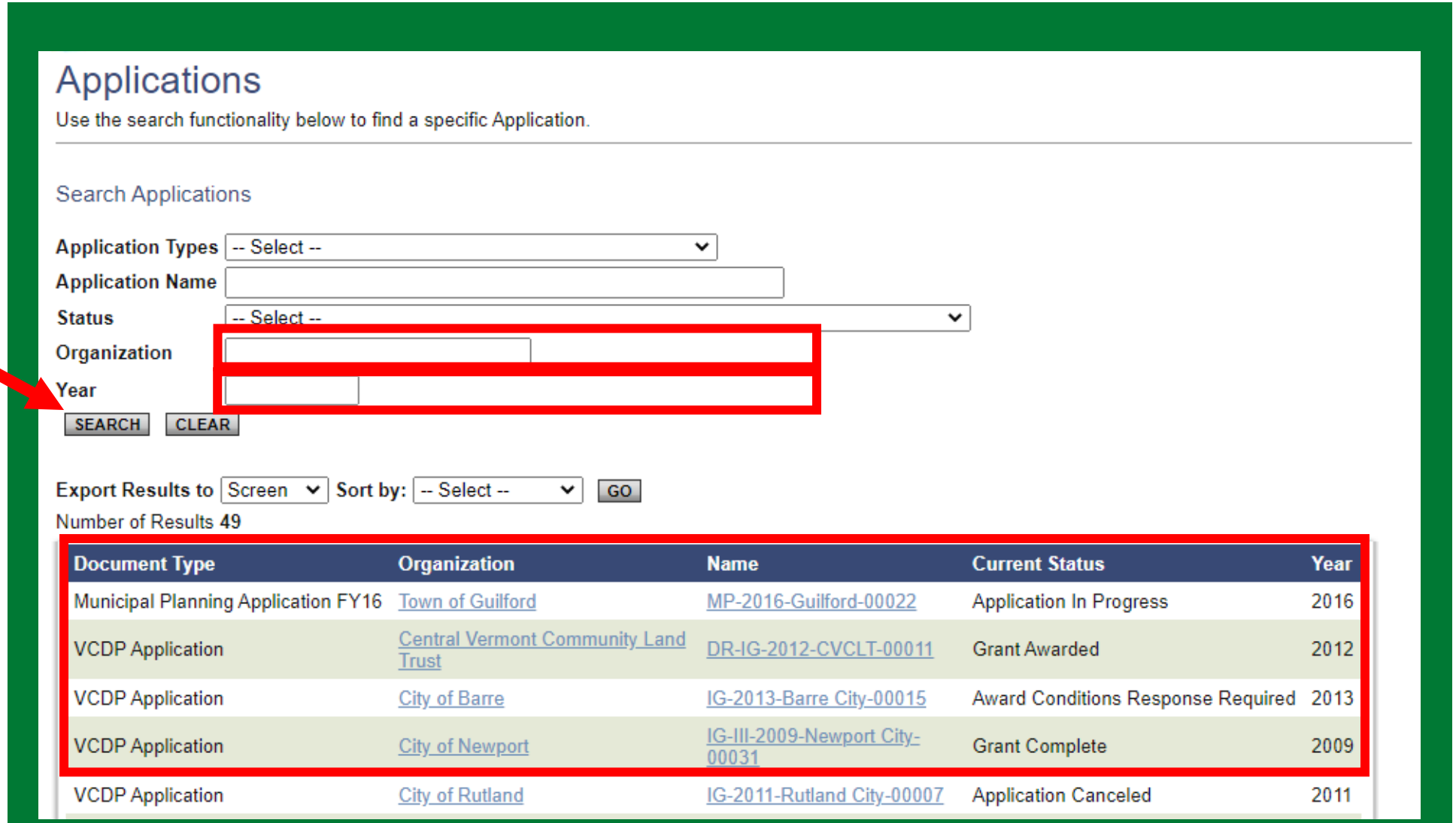
Searching for Applications

- Applications Tab Provides links to applications and ER's
- Just click search and all the applications you have access to will populate
- Enter name of organization and search you will get all for that organization
- Enter year and search you will get all for that year



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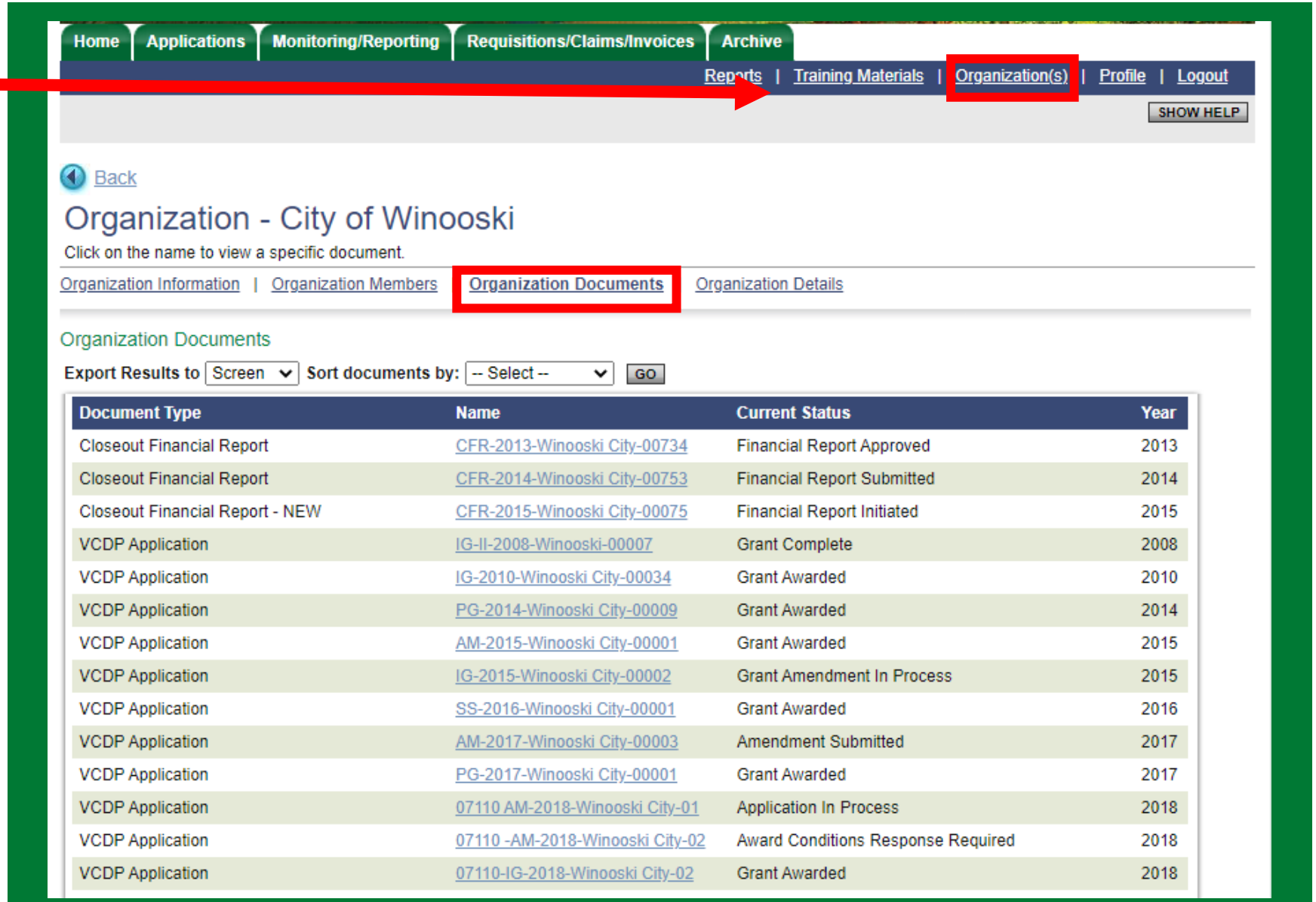
Searching for Applications

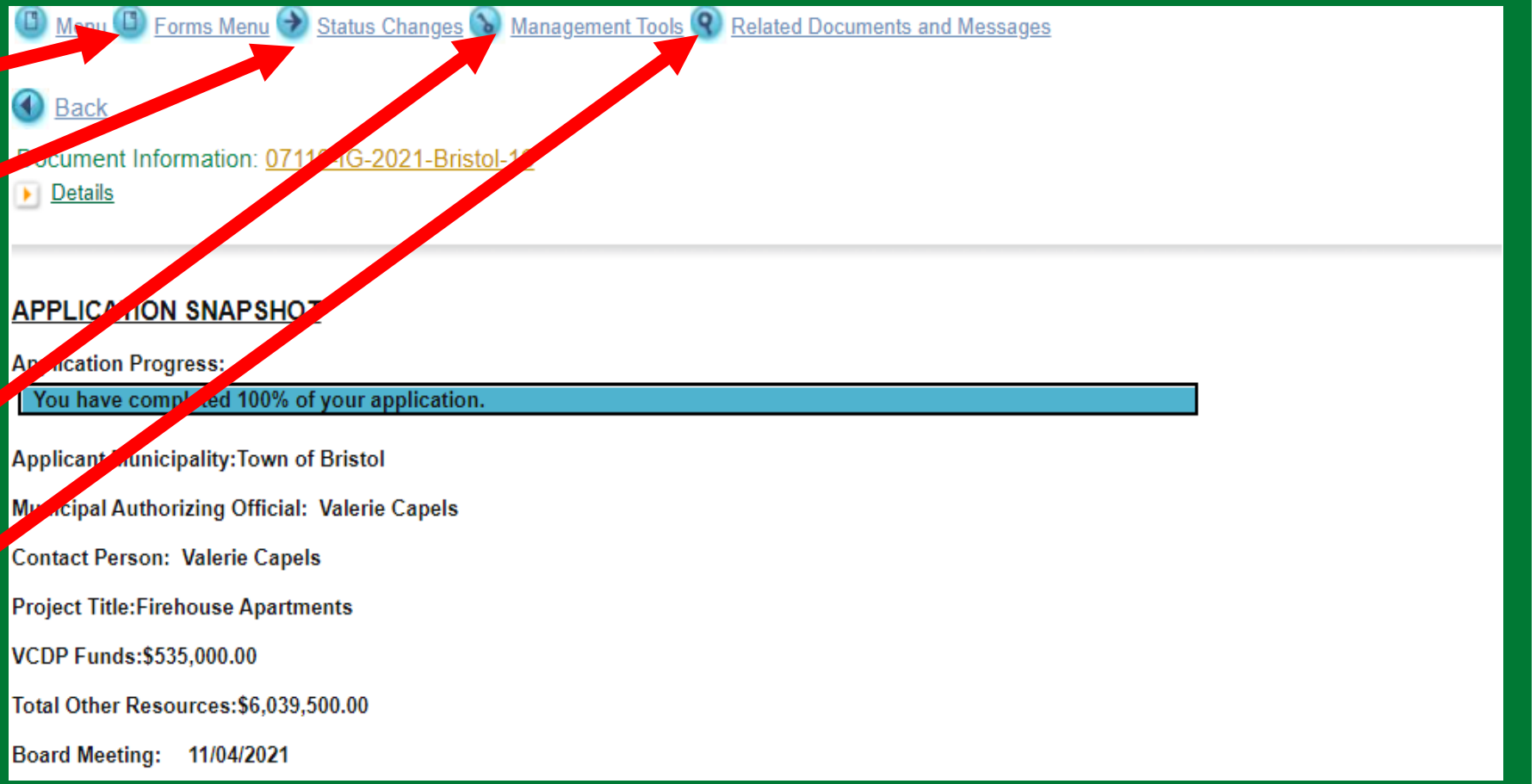
- Organizations
  Provides links to all documentation you have access to for that organization.



Document Type	Name	Current Status	Year
Closeout Financial Report	CFR-2013-Winooski City-00734	Financial Report Approved	2013
Closeout Financial Report	CFR-2014-Winooski City-00753	Financial Report Submitted	2014
Closeout Financial Report - NEW	CFR-2015-Winooski City-00075	Financial Report Initiated	2015
VCDP Application	IG-II-2008-Winooski-00007	Grant Complete	2008
VCDP Application	IG-2010-Winooski City-00034	Grant Awarded	2010
VCDP Application	PG-2014-Winooski City-00009	Grant Awarded	2014
VCDP Application	AM-2015-Winooski City-00001	Grant Awarded	2015
VCDP Application	IG-2015-Winooski City-00002	Grant Amendment In Process	2015
VCDP Application	SS-2016-Winooski City-00001	Grant Awarded	2016
VCDP Application	AM-2017-Winooski City-00003	Amendment Submitted	2017
VCDP Application	PG-2017-Winooski City-00001	Grant Awarded	2017
VCDP Application	07110 AM-2018-Winooski City-01	Application In Process	2018
VCDP Application	07110 -AM-2018-Winooski City-02	Award Conditions Response Required	2018
VCDP Application	07110-IG-2018-Winooski City-02	Grant Awarded	2018

Navigating within an Object

- Breadcrumb Menu - is the same in all objects
- Forms Menu – all required forms for that object.
- Status Changes – only the person with the role to change the status will see next available status
- Management Tools – create a pdf of the object, who's attached etc.
- Related items – all children of the object



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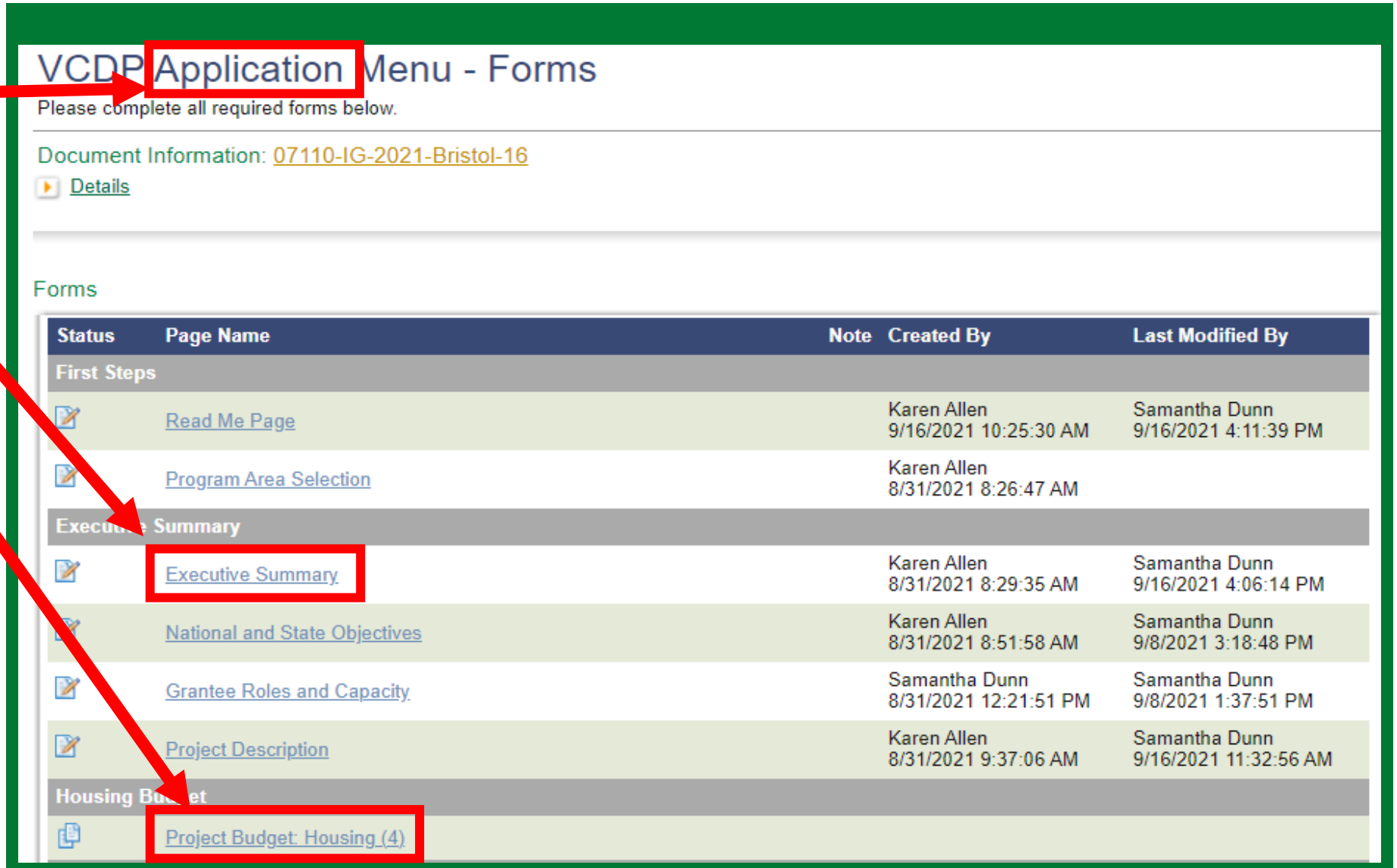
Forms within an Object

- Forms Menu – of the Application
- To go to the form, click on the page name link
- Notice (4) : This means there are 4 Project Budget Housing Pages



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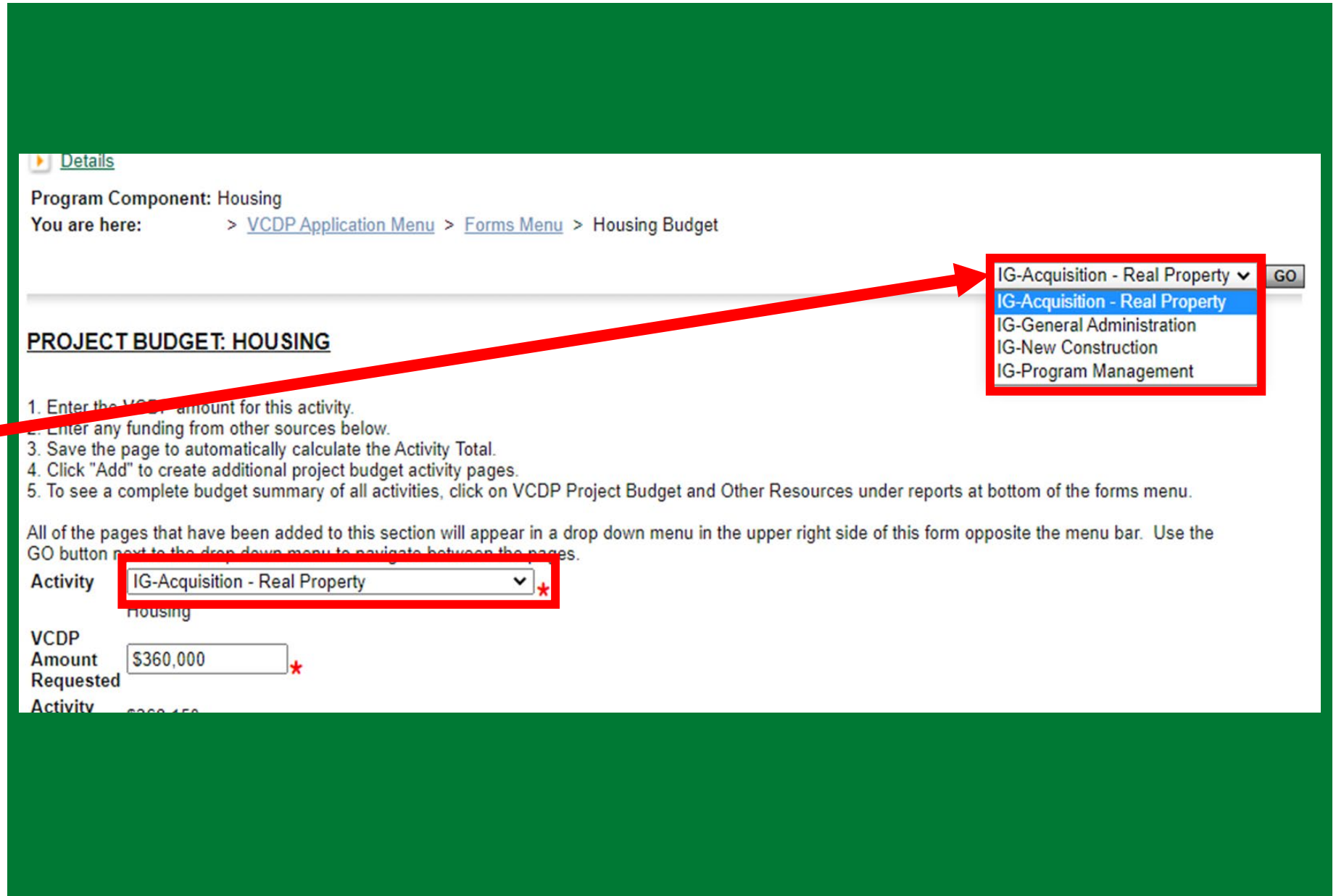
Forms with Multiple Pages

- Each page is identified by the activity in this case and are listed in the drop down in the upper righthand corner
- To navigate between the different project activities, select activity in the dropdown on the upper right-hand corner and select “Go”



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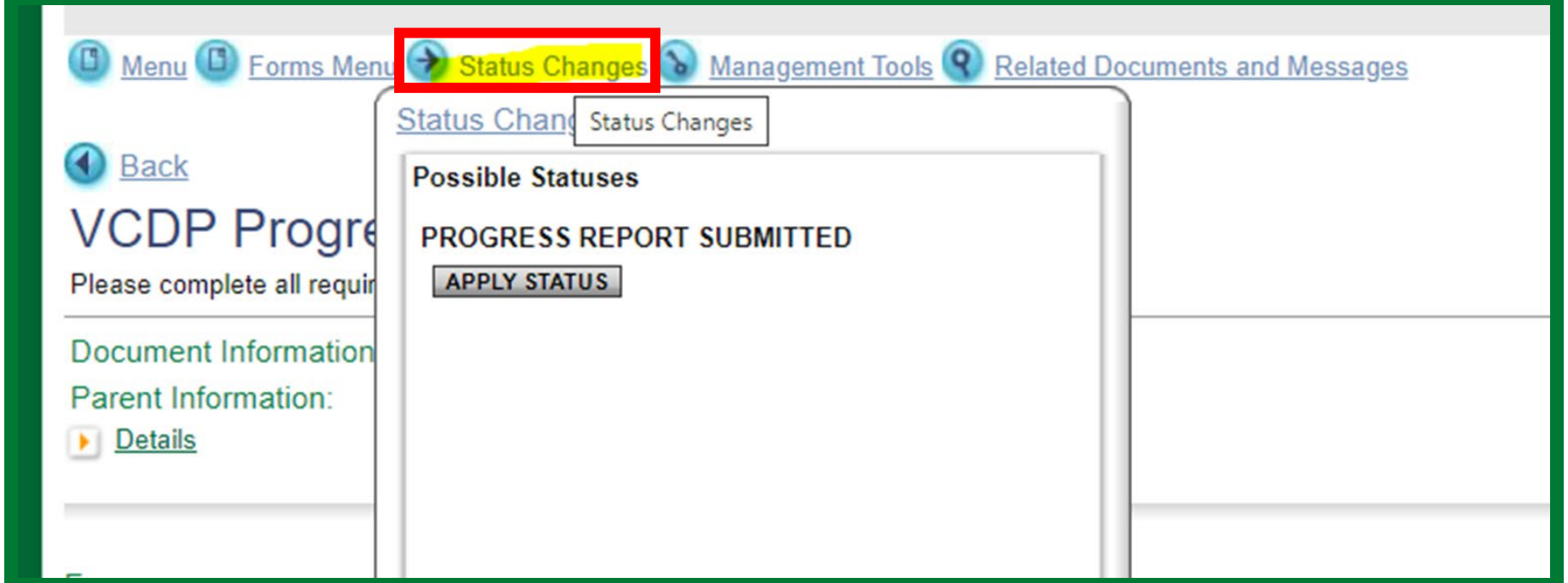
Status Changes

- Depending on your role determines if you have the permissions to change the status



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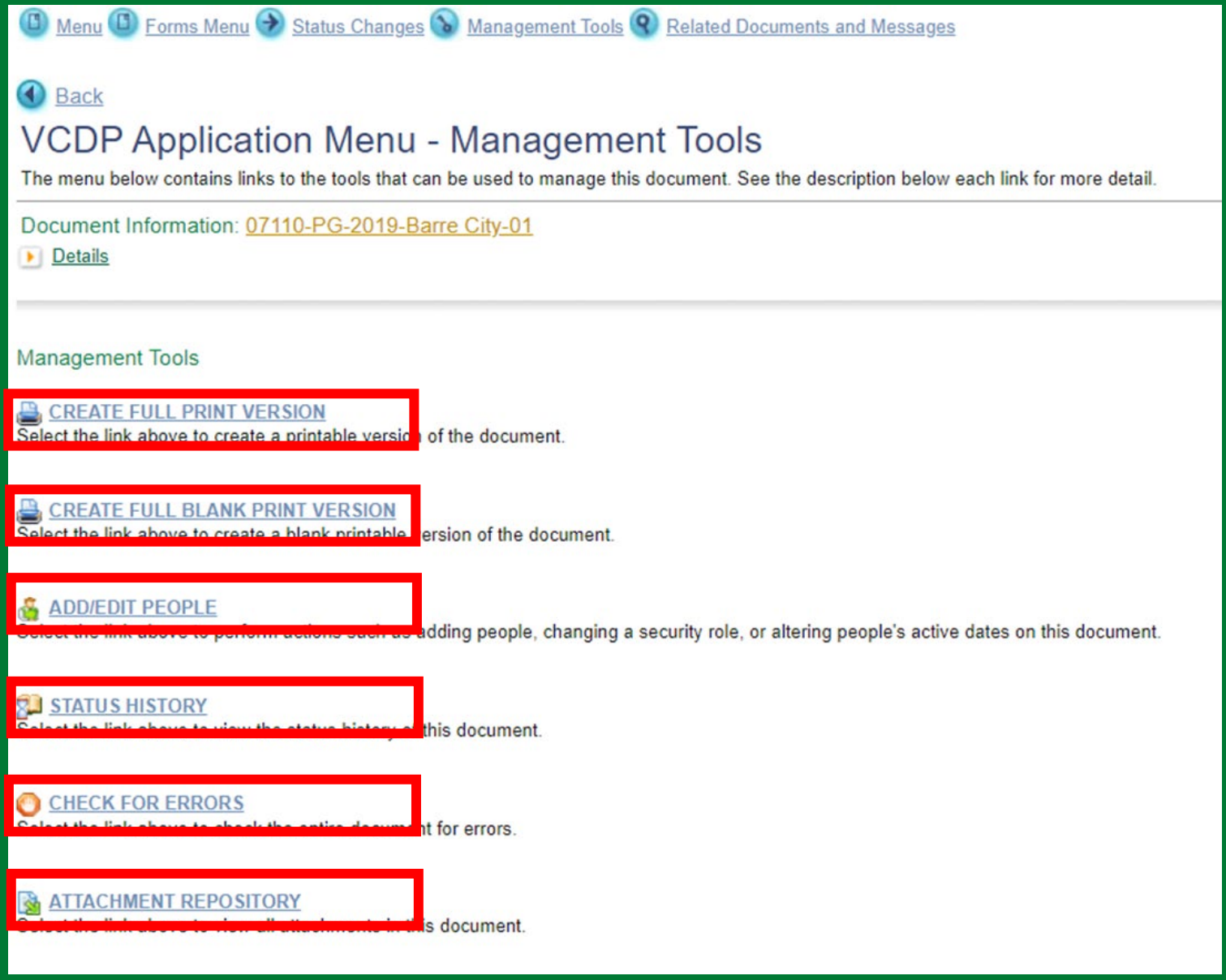
Management Tools

- Create a full print version allows you to have a copy of everything that has been entered
- Create a blank version a blank version of the object
- Add/Edit People you can see who's attached
- Status History shows the history of who has changed the statuses for the object (App, Req, ER etc)
- Check for Errors allows you to check if data is missing before submitting
- Attachment Repository you can see everything uploaded to the object (App, Req, ER, etc)



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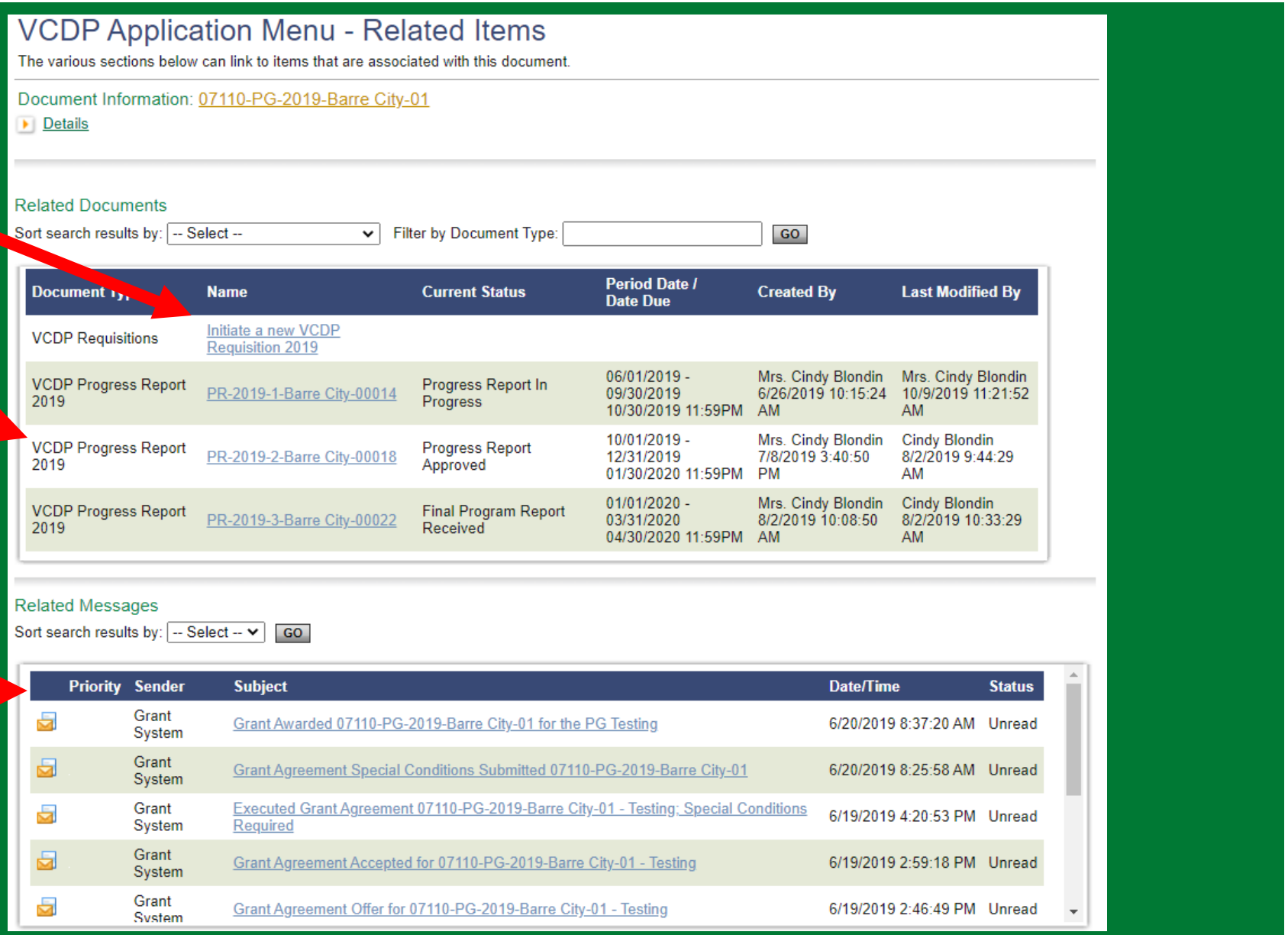
Related Documents and Messages

- Related Documents & Messages
- This is where you would create requisitions
- You see the complete list of Requisitions, Progress Reports, Davis-Bacon and Onsite Monitoring Reports Related to the Grant

  NOTE: Environmental Reviews are under applications tab or My Tasks
- Messages



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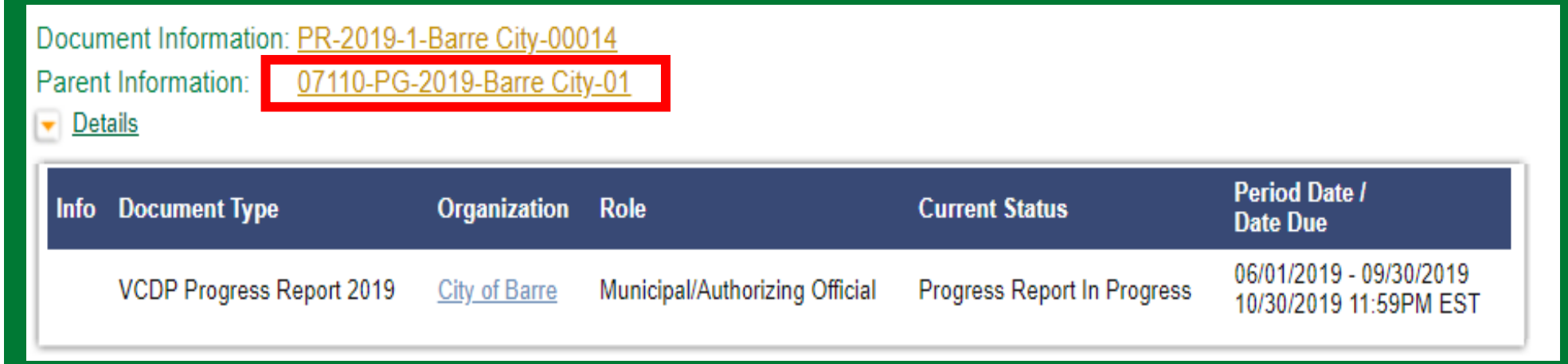
Related Documents

- When in a related document you can navigate back to the Application by selecting the “Parent Information link”



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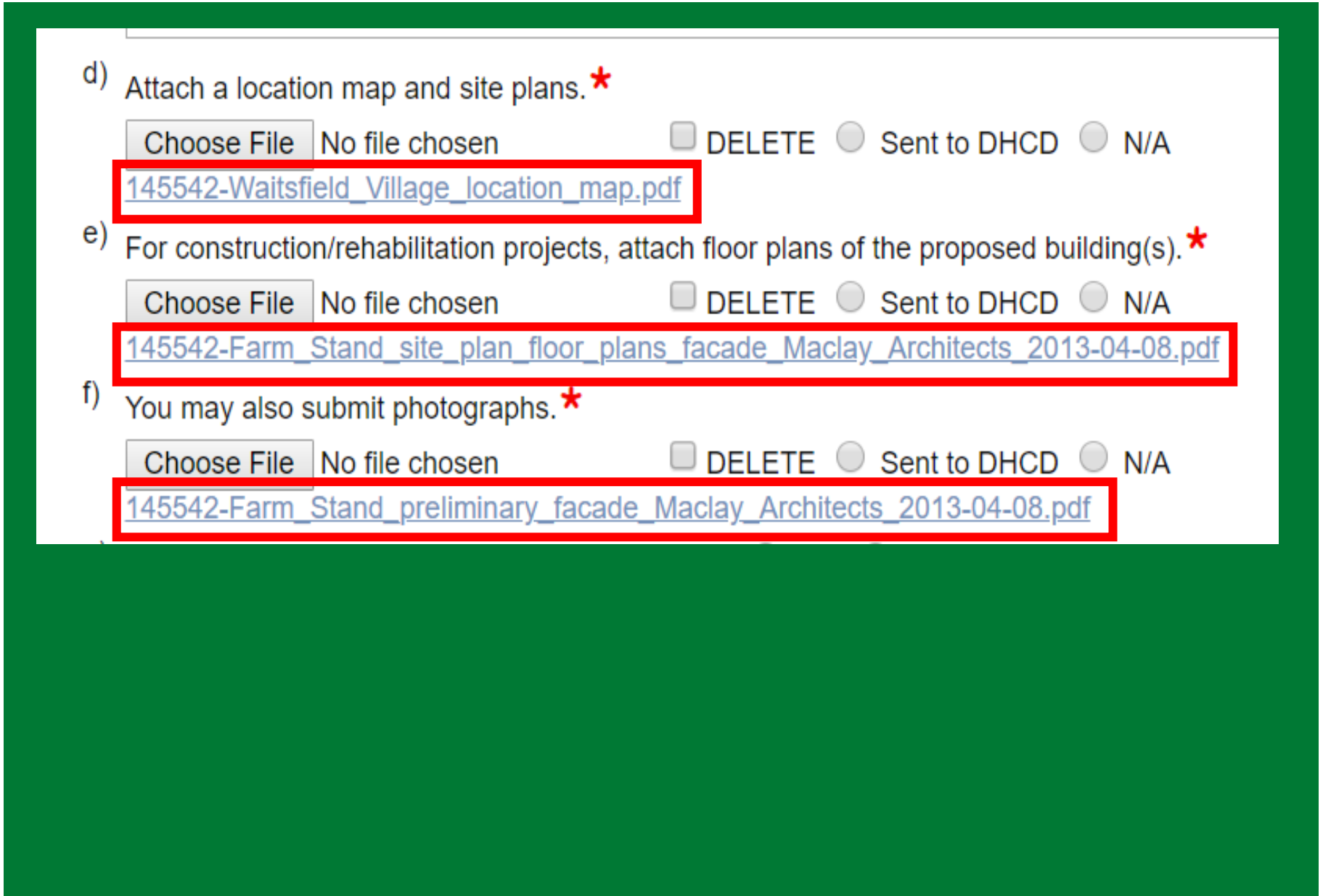
Uploads

- Uploads within the system are stored as links. Clicking the link will open the uploaded document in a new tab.



Project Budget Report

Forms Menu of an Application

- Located at the bottom of the menu
- Aggregate of budget activity pages
- 1st link to view report on the screen
- 2nd link to review the report in excel

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Project Budget Report

Shows

- All other resources entered for each activity as a whole
- All Activities and funding tied to that activity
- Program Area

VCDP Project Budget and Other Resources

This used to be called "Budget Summary".

Export Results to Screen | Results Per Page 20 | Sort By -- SELECT -- ASCENDING

Number of Results **1**

Results

Application Number	Municipality	Title
07110-IG-2021-Bristol-16	Town of Bristol	Project Budget and Other Resources

1

Other Resources	Funding Source	Type	Amount	Status
Bank Financing (BANK)	Private	Loan	$300,000	Pending
Efficiency Vermont (EVT)	Private	Equity	$54,000	Pending
HOME Investments Partnerships (HOME)	Federal	Deferred Loan	$520,000	Committed
Low Income Housing Tax Credit (LIHTC)	Private	Equity	$4,065,500	Pending
Vermont Housing & Conservation Board (VHCB)	State/Local	Deferred Loan	$1,100,000	Committed

Activity	Program Area	Code	VCDP Amount	HOME	VHCB	LIHTC	EVT	BANK	Total Activity Costs
Acquisition - Real Property	Housing	3001	$360,000		$8,150				$368,150
Program Management	Housing	3013	$175,000	$169,345	$477,205	$223,250		$226,002	$1,270,802
New Construction	Housing	3021	$0	$350,655	$614,645	$3,839,250	$54,000	$73,998	$4,932,548
General Administration	Housing	5013	$0			$3,000			$3,000
Total Costs			$535,000	$520,000	$1,100,000	$4,065,500	$54,000	$300,000	$6,574,500
Percentage of Total			8%	8%	17%	62%	1%	5%	

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Requisition Summary Report

Forms Menu of an Application

- Located at the bottom of the menu
- Aggregate of all requisitions
- 1st link to view report on the screen
- 2nd link to review the report in excel

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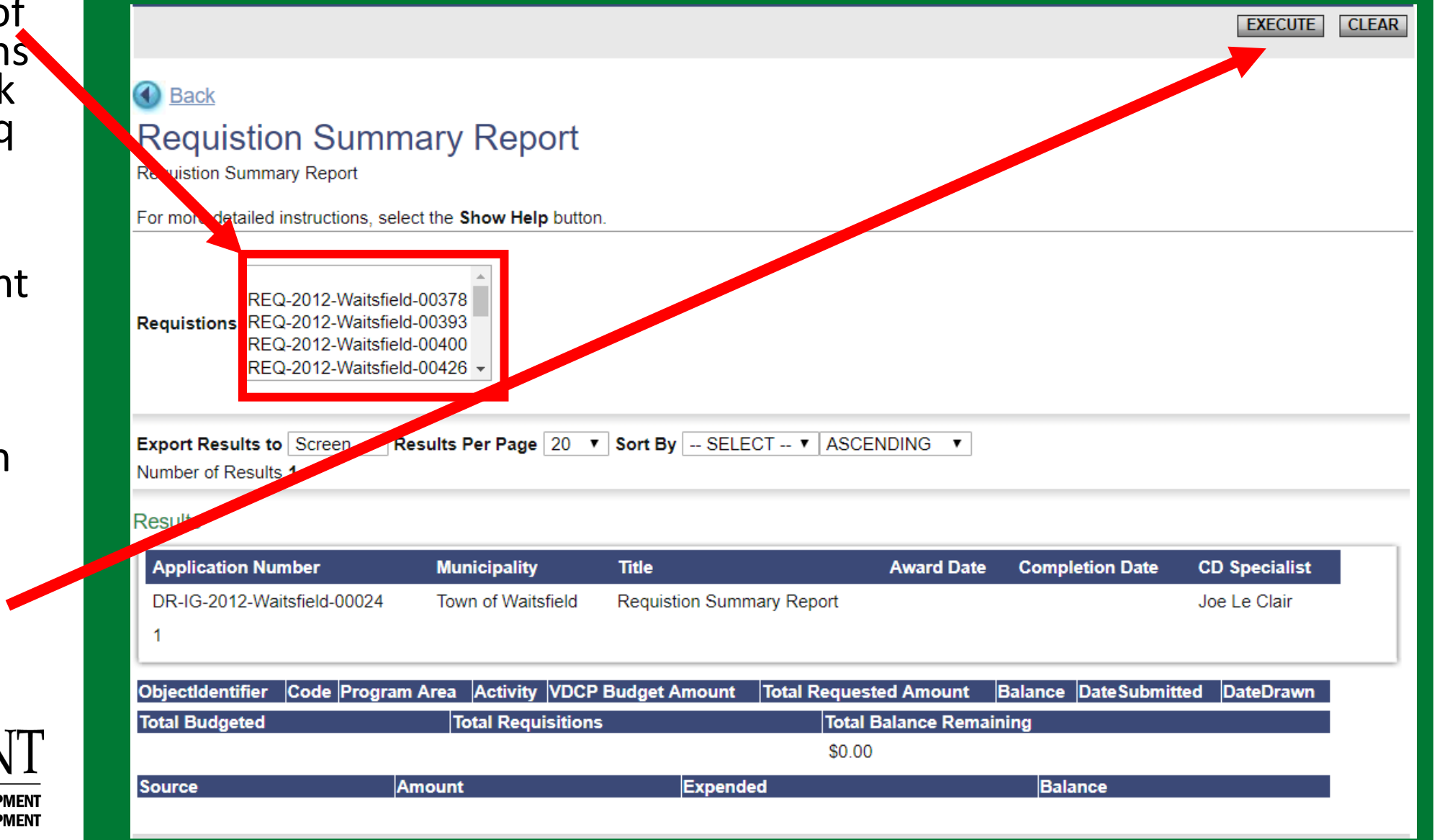
Requisition Summary Report

- To select ALL of the requisitions on the list click on the top Req then click CTRL+A (or Shift+last req) all will highlight
- To select ONE Req click CRTL+click on the requisition
- Then select Execute



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Requisition Summary Report

Shows

- all of the requisitions for the grant selected when running the report
- Requests for funding by activity and balance
- Date submitted
- Date funds were drawn

ObjectIdentifier	Code	Program Area	Activity	VDCP Budget Amount	Total Requested Amount	Balance	DateSubmitted	DateDrawn
REQ-2012-Waitsfield-00378	1021	Public_Facilities	New Construction	$868,700.00	$56,982.00	$811,718.00		
REQ-2012-Waitsfield-00378	IG	Public_Facilities	Program Delivery	$30,000.00	$152.00	$29,848.00		
REQ-2012-Waitsfield-00378 Total				$898,700.00	$57,134.00	$841,566.00	1/6/2016 2:26:54 PM	1/19/2016 11:50:45 AM
REQ-2012-Waitsfield-00393	1021	Public_Facilities	New Construction	$868,700.00	$49,543.00	$762,175.00		
REQ-2012-Waitsfield-00393	IG	Public_Facilities	Program Delivery	$30,000.00	$7,513.00	$22,335.00		
REQ-2012-Waitsfield-00393 Total				$898,700.00	$57,056.00	$784,510.00	2/9/2016 3:11:31 PM	2/12/2016 3:46:41 PM
REQ-2012-Waitsfield-00400	1021	Public_Facilities	New Construction	$868,700.00	$93,169.00	$669,006.00		
REQ-2012-Waitsfield-00400	IG	Public_Facilities	Program Delivery	$30,000.00	$0.00	$22,335.00		
REQ-2012-Waitsfield-00400 Total				$898,700.00	$93,169.00	$691,341.00	2/29/2016 3:22:11 PM	3/17/2016 8:30:04 AM
REQ-2012-Waitsfield-00426	1021	Public_Facilities	New Construction	$868,700.00	$133,688.00	$535,318.00		
REQ-2012-Waitsfield-00426	IG	Public_Facilities	Program Delivery	$30,000.00	$8,571.00	$13,764.00		
REQ-2012-Waitsfield-00426 Total				$898,700.00	$142,259.00	$549,082.00	5/2/2016 4:27:00 PM	5/16/2016 3:17:40 PM
REQ-2012-Waitsfield-00433	1021	Public_Facilities	New Construction	$868,700.00	$195,114.00	$340,204.00		
REQ-2012-Waitsfield-00433	IG	Public_Facilities	Program Delivery	$30,000.00	$1,113.00	$12,651.00		
REQ-2012-Waitsfield-00433 Total				$898,700.00	$196,227.00	$352,855.00	5/25/2016 4:18:14 PM	6/1/2016 2:38:25 PM

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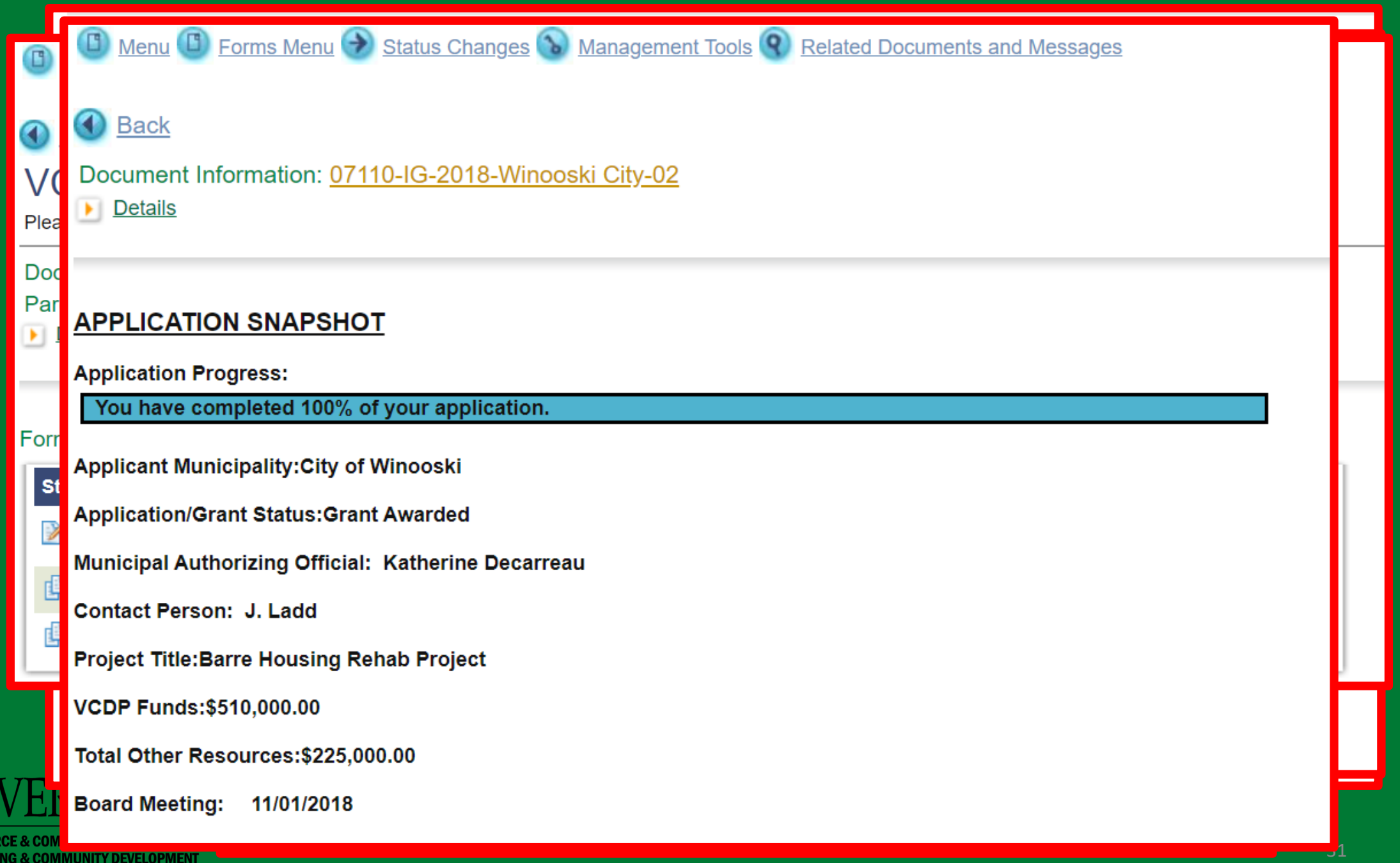
Tips

- Email from Town to VCDP staff should include –
  - ✓ name(s) of individual(s) needing access
  - ✓ role each individual needs
  - ✓ object identifier
- Locked out of your account wait 20 minutes and try again
- Upload limit is 30 MB per upload
- Save often the system will timeout
- Don’t use the back button in the browser, use the back button the top of the page


Menu
Forms Menu
Status Changes
Management Tools
Related Documents and Messages
Back
Document Information: 07110-IG-2018-Winooski City-02
Details
APPLICATION SNAPSHOT
Application Progress:
You have completed 100% of your application.
Applicant Municipality:City of Winooski
Application/Grant Status:Grant Awarded
Municipal Authorizing Official: Katherine Decarreau
Contact Person: J. Ladd
Project Title:Barre Housing Rehab Project
VCDP Funds:$510,000.00
Total Other Resources:$225,000.00
Board Meeting: 11/01/2018

Questions

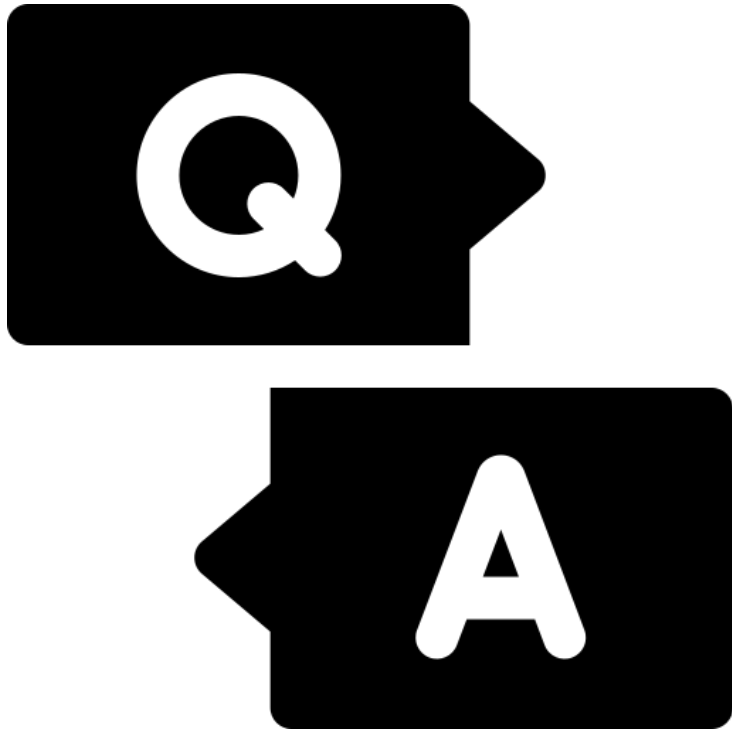
Thank You

Contact:

Cindy Blondin

Cindy.Blondin@vermont.gov

Phone : 802-828-5219



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