

GMS User Management for Authorized Representative

Every applicant and grantee has one person, designated the *authorized representative* (also called *district administrator*), who is legally empowered to sign grant applications and awards. In many cases this is a district's or supervisory union's superintendent. By AOE policy, the authorized representative also has *sole authority* over who has permissions to view, create, and edit various grant applications and data collections on the Grants Management System, or perform other functions, on behalf of their organization. When the AOE GMS Help Desk receives requests to grant someone access to something, we cannot do so without the authorized representative approving this action.

As of February 2020, the GMS now supports a function that allows an authorized representative to respond to these requests directly and easily, and do other account maintenance for authorized users in their organization, the **Access Request To Do List**. They will also receive emails when new user requests have been created.

How To Reach The Access Request To Do List

Authorized representatives will find a new item on their main menu:

Administrative

Access Request To Do List LEA

AOE Reports

GMS Access / Select

Central Data with Common Assurances

Continuous Improvement Plans

Funding Applications

Other Data Collections

► Monitoring

When you choose this item, if you are the authorized representative for more than one organization (for instance, for a since-retired organization that merged due to Act 46 as well as the new organization that subsumed it), you will also find an organization pull-down menu to choose which one to work with, at the top of the resulting screen:



GMS LEA User Maintenance

Organization: Burlington SD

Contact Information:

If you have questions about this document or would like additional information please contact:
Jessica Chauvin at Jessica.chauvin@vermont.gov

Simply use this menu to select the organization whose users you wish to maintain. If you are the authorized representative for only one organization, it will automatically be selected.

New User Requests

At the top of the Access Request To Do List screen is a section titled **New User Requests**. If anyone has used the **New User** link on the GMS landing page to request access on behalf of your organization, that request will appear here, as in this example:

NEW USER REQUESTS			
Name	Date Submitted	Status	Status Date
New User Request For 82-Mt. Mansfield Union School	February 18, 2020	SubmittedToLocal	February 18, 2020

Click anywhere on this row to see the details of the request:

NEW USER REQUEST

Mt. Mansfield Union School District

First Name: Julie

Last Name: Morris

Email: jmorris@mmuusd.org

Role: LEA Data Entry role requested

AVAILABLE BUSINESS ROLES

- lea21Century
Create and edit 21CCLC grant applications
[assign](#)
- leaBEST
Create and edit BEST/Act230 and Innovation grant applications
[assign](#)

BUSINESS ROLES TO ASSIGN

[ACCEPT](#) [REJECT](#) [CLOSE](#)

At the top you can see the details of the request, including the name, email address, and a level of access requested (this is only advisory; it's up to you what permissions to give). Below, you have a list of roles to assign, in a scrolling list.

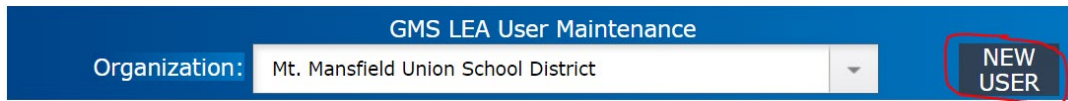
If the request is to be denied, click **Reject**. The requester will receive an email informing them the request was denied.

To accept the request, you must first select one or more permissions. There's an explanation of the permissions at the bottom of this document, and each one also includes a brief explanation. Simply click **assign** for each one the person should have, to move it from the left to the right. Note that you will typically give nearly everyone **leaViewOnly** (allows them to see, but not

affect, all grant applications, data collections, and payments in the GMS), and almost never give anyone leaDataEntry (this lets them edit and create everything in the system). Give the smallest amount of permissions necessary for them to do their job, then click **Accept**. They will be emailed of the acceptance of their request and given their one-time starter password.

Creating A New User Manually

In the upper right is a **New User** button:



Click this to create a new user account for your organization without waiting for them to submit a request. The resulting screen looks just like the one shown above, save that the First Name, Last Name, and Email Address fields are open for you to type into. Simply enter the name and email address, assign permissions as above, and click **Add**.

Removing A User's Access

Below the **New User Requests** section there is a **District Users** section which lists all the users and their permissions, consisting of entries like this:

John Alberghini	john.alberghini@mmuusd.org	leaViewOnly , leaDistrictAdmin
Jennifer Cote	jenn.cote@cesuvt.org	leaViewOnly , leaBusinessManager
Becky Giroux	becky.giroux@cesuvt.org	leaTobacco , leaViewOnly , leaIDEA , leaPerkins , leaBusinessManager , leaBEST

Simply click on any of these to bring up the same screen as for new user requests, showing their existing account and permissions. You can then click **Remove** to remove their access entirely.

Changing User Permissions

From the same screen as above, you can also use **assign** and **unassign** to add and remove permissions. Those on the right will be the permissions they have when you're done. Click **Update** to save these changes.

What Do All These Permissions Mean?

Most of the permissions are named for a particular grant program such as 21st Century or BEST/Act230, and give permissions to create the corresponding grant applications, edit them, and submit them to the authorized representative. (Only the authorized representative can agree to assurances or submit to the AOE.) In some cases, a single permission is used to grant

access to multiple related grants and programs that are nearly always worked on by the same LEA staff. For instance, the **leaCFP** permission also includes applying for the Title III Immigrant grant, the SIG 1003g grant, and the Title I School Improvement grant. (In rare cases where you'd like to more finely control permissions than this, contact the AOE.GMSHelp@vermont.gov help desk and we can manually set more granular permissions.)

Here are notes on specific permissions and what they include:

- **leaBusinessManager**: Can create and submit claims (reimbursement requests, also called AOE 3.0) and closeout reports (also called expenditure reports) for all grant programs. Can also create, edit, and submit to authorized representative, the Central Data collection, as well as the ESSER grant.
- **leaCFP**: Can create and edit the Consolidated Federal Programs application as well as related applications including SIG 1003g, Title I School Improvement, and Title III Immigrant. Can also edit Continuous Improvement Plans and Central Data.
- **leaCIP**: Can only create and edit Continuous Improvement Plans. (We are unable to restrict people to only being able to create a specific CIP for a specific school.)
- **leaDataEntry**: Gives edit access to everything. AOE does not use this permission and neither should you.
- **leaDistrictAdmin**: The authorized representative position who can create and edit everything, agree to assurances, and submit to AOE. There should only be one of these in any organization, except by special arrangement, so do not assign this to anyone else.
- **leaESSER**: Can create and edit the ESSER grant. (This is normally done by business managers, but this role lets you delegate others who can also do it.)
- **leaViewOnly**: Allows viewing, though nothing else, of all other grant applications, data collections, and payment requests. Most user accounts should have this permission, except in special limited cases (e.g., principals with only **leaCIP** might not get this).

For Further Assistance

The AOE GMS Help Desk can also complete these functions and can assist you with completing them. Note, however, that by policy we cannot complete them without confirming with the authorized representative. If you're having difficulty with any of these steps, email us at AOE.GMSHelp@vermont.gov or call us at the phone number at the bottom of the screen in the GMS, and we'll be happy to walk you through it.