Entity Management



Housekeeping



Submitting Questions

Submit any questions you might have during the session via the WebEx Q&A function. Please address the question to "All Panelists."

If you need technical assistance with WebEx, please let us know via the WebEx chat.



Agenda

- Entity Management Overview
- JustGrants Onboarding
- Ongoing Maintenance
- Resources for Additional Training



Workshop Objectives

At the end of this session you should be able to:

- ✓ Describe the roles that are important in JustGrants
- \checkmark Describe the onboarding process for new users
- ✓ Perform ongoing user maintenance in the JustGrants system
- ✓ Locate training resources and FAQs on our Justice Grants website.

Resources

- Justice Grants Resources Website: Find more information about JustGrants, including training, resources, and news and updates.
- Entity User Experience Training and <u>Reference Materials</u>
- <u>Entity Management Training and</u>
 <u>Reference Materials</u>
- JustGrants User Roles Guide



JustGrants Technical Support

If you need support beyond what is available at the self-service portion of the Justice Grants website, please reach out the appropriate Technical Support desk.

Technical Support	
OVW applicants and award recipients	<u>OVW.JustGrantsSupport@usdoj.gov</u> <i>Or</i> (866) 655–4482
All other applicants and award recipients	JustGrants.Support@usdoj.gov Or (833) 872–5175 Monday – Friday between the hours of 5:00 AM and 9:00 PM EST Saturday, Sunday, and Federal holidays from 9:00 AM to 5:00 PM EST

Entity Management

- Entity Administrator role
- Maintaining SAM.gov



What is an Entity?

- The word Entity is used in place of applicant and/or recipient.
- This is used to meet federal standards.
- Most entities in JustGrants will be organizational entities composed of multiple individuals, but an Entity can also be a single individual.
- Organizational entities must register in SAM.gov in order to apply for funding in Grants.gov.



Importance of the Entity Administrator Role



- The Entity Administrator is the key user management role within an entity.
- The Entity Administrator bears responsibility for managing entity information and users in JustGrants.
- If the Entity Administrator and SAM.gov E-Biz POC are not the same person, it is important they communicate to make changes, when necessary, in SAM.gov.

Who should have the Entity Administrator Role?

- ✓ Must have knowledge of DOJ awards.
- Must have knowledge of the people required to access JustGrants to apply for funding and effectively manage DOJ awards.
- Must have the ability to respond to entity users in a timely manner to ensure applications and awards can be assigned to correct users so work can be completed.



Entity Administrator Role and Responsibilities



- Confirms information contained in the Entity Profile is current.
- Manages entity users, including user role assignments in DIAMD, and specific application and award-level assignments in JustGrants.
- The person listed as the SAM.gov Electronic Business (E-Biz) Point of Contact is the default Entity
 Administrator in JustGrants for initial account creation, but this role can be assigned to another user once the entity is onboarded.

Entity User Management

- The Entity Administrator serves as the "gatekeeper" for Entity Users:
 O Invites members to their Entity
 - \odot Selects roles to assign or remove as appropriate for each member
 - $\odot\,\mbox{Re-invites/Removes}$ members from the Entity
 - \odot Replace yourself as the Entity Administrator
- When assigning individuals to specific roles in JustGrants keep in mind:

 What actions will users need to take in JustGrants on behalf of the Entity?
 What roles would enable those users to take those actions?

Entity Management: SAM.gov



✓ Keep registration active (annual update required)
 ✓ Keep contacts current (e.g., E-Biz POC)

SAM.Gov



- ✓ Keep Users and Roles current
- ✓ Adds, removes, and changes roles
- ✓ Reassigns the Entity Administrator role

DIAMD



Make sure JustGrants shows your current Entity Users
 Assigns users to Applications and Awards

JustGrants

Ongoing Entity Management Maintenance

- Entity level data is now managed in SAM.gov
- Changes and updates to entity information are made in SAM.gov
- JustGrants pulls its entity information directly from SAM.gov •



correct:

- Check email for the registration letter
- If no registration email is found, contact

JustGrants.Support@usdoj.gov and ask to be re-invited.

correct:

- Make the change in SAM.gov ٠
- Wait 24 hours, and then request ٠ the invitation email

received JustGrants e-mail

Request a new invitation by sending an email to:

JustGrants.Support@usdoj.gov

Entity Administrator Troubleshooting

How do I find out who is the Entity Administrator for my entity within JustGrants?

Log in to JustGrants and from the left navigation menu, click on the Entity Users tab. This will show all of the users and the roles that have been granted to the user by the Entity Administrator in DIAMD.

This view doesn't show who has been assigned a role on a specific award or application.

The Entity Administrator

Entity Administrator: No Access

The Entity Administrator has left the organization, and no one can login or make changes. How do we fix this?

Ideally, the JustGrants Entity Administrator will delegate this role to another user prior to leaving the entity. If the user is no longer available, the JustGrants Support Desk will have to invite a new Entity Administrator based on the current SAM E-Biz Point of Contact.

Contact the JustGrants Support Desk for assistance by email at <u>JustGrants.Support@usdoj.gov</u> or by phone at 1-833-872-5175.

The Entity Administrator

Entity Administrator: Delegation

The Entity Administrator is out on leave, and we can't get into JustGrants. What steps do we take from here?

Ideally, the Entity Administrator will invite any users, assign roles, and assign work prior to their absence. The Entity Administrator (EA) should delegate the EA role to another user if they will be out for an extended period. JustGrants Support cannot grant temporary EA access to another user.

The Entity Administrator

The Entity Administrator

SAM.gov allows an entity to assign an alternate E-Biz Point of Contact. It is recommended that entities assign a unique alternate user instead of entering the same user for both.

Not having an alternate will delay the entity moving forward in the process if the E-Biz POC is no longer available.

Entity Administrator: E-Biz POC

Unique Entity Identifier

Entity Management: UEI

What is a UEI?

A UEI number is a unique identifier, assigned to each specific, unique legal entity based on the Legal Name and Doing Business As Name (when DBA is identified). Some entities have multiple UEI numbers. If your entity applies for or has DOJ awards under multiple UEI numbers, each UEI number entity will have a separate JustGrants profile.

As of April 4, 2022, the Federal government no longer uses a DUNS number to uniquely identify entities. Entities doing business with the federal government use the UEI created in SAM.gov.

Unique Entity Identifier (UEI)

- Effective April 4, 2022, the DUNS number was replaced with the Unique Entity Identifier (UEI).
- UEI is a **12-character** alpha-numeric value
- Search entity registrations, exclusions, and contract opportunity awards using UEI
- Simplifies the process of registering an organization



Unique Entity Identifier (UEI) (Con't)

Each UEI in SAM.gov creates a separate account in JustGrants.

- The UEI is a unique identifier for each legal entity.
- Organizations using multiple UEIs to manage awards WILL HAVE multiple JustGrants accounts
 - Each account must have its own users.
 - Each user must have a unique email address for each account.
 - Users logging in to one JustGrants account WILL NOT see awards that are managed in another JustGrants account.

Troubleshooting Multiple UEIs

- Entity Administrators are able to:
 - Add users to their JustGrants account(s) be sure to register using different email addresses for each UEI that user will represent
 - Log in to each JustGrants account separately to manage invitations
- Technical Support is required to:
 - Invite Entity Administrator to a JustGrants account after a SAM.GOV update
 - Move awards from one UEI account to another, after Program Office investigation and approval

Unique Entity Identifier

Entity Management: UEI in SAM.gov

How do I locate my UEI in SAM.gov?

SAM.gov has already generated your UEI. To see it in SAM.gov, log in and select the numbered bubble above Active in the Entity Management widget.

You should then see your record(s) appear, and the UEI number(s) appear on the left side of each record.

Make note of this number, as you will use it to locate your entity record in SAM.gov, and it is also a primary identifier in Grants.gov and JustGrants.

Locate Your UEI in SAM.gov



1.Log in to <u>SAM.gov.</u>2.In your Workspace, select the numbered bubble above Active in the Entity Management widget.

Locate Your UEI in SAM.gov (cont.)

Show Workspace For Non-Federal Entities	-	< 1 of 1 > Result 25	ts per page ▼	Sort by Expire	ation Date Ascending
Non-Federal Entities			Purpose of Registration:	Registration Status	Expiration Date
Filter By	•	SAM Unique Entity ID:	Federal Assistance Awards	Active	Jun 10, 2022
Search by Keyword	Ý	CAGE/NCAGE:			
Entity Registration Status	~				
Draft Work in Progress					
Submitted		You should	d then see your	r record(s)
Expired		appear, ar	nd the UEI num	ber(s) ap	opear on
Expiration Date	~	the left sid	le of each reco	rd.	
Address Update	~				

Unique Entity Identifier

Entity Management: UEI in JustGrants

How do I locate my UEI in JustGrants?

To locate your UEI in JustGrants, log in to your account, and the Entity Profile menu option on the left of the home page. Your UEI is displayed in the center of the page.

JustGrants will continue to display the DUNS number, located just above the UEI.

Locate the UEI in JustGrants

JUSTGram	ts. TEM			🖤 🤉 🗩		
				A		
Entity Profile	Entity Profile					
ℜ Entity Users	Information sh	nown is retrieved from your Entity's SAM.gov profile. Changes	MUST be made in SAM.gov			
Entity Documents	Legal Name JGII Test Org26	DUNS 00000026	SAM Registration Status Active			
Applications	Doing Business As JGII Test Org26 Doing Business As	UEI RKV2V7M6FJ03	SAM Expiration Date Feb 6, 2023			
R Awards	Business URL https://www.ort.org26.il/	11N/EIN 260000000	Date Established Sep 16, 1992			
n Federal Forms	Applicant Type C	ROID 5144503	SAM Last Updated Date Jan 21, 2022			
Fog Toggle Management	Division Name DIVISION NAME 26	ORI Number	Fiscal Year Not a valid date0			
	Alternate ID	Law Enforcement No Yes	Faith Based No Yes			
	Physical address will appear on all award documents					
	Physical Address					
	Street 1 111 Street Rd	Street 2	County/Parish			
	City Washington	Country United States	Congressional District 5	®		

QUESTIONS: Entity Management

JustGrants Onboarding

Onboarding Entity Users



Entity Management: DIAMD



Keep registration active
 Keep contacts current (e.g., E-Biz POC)

Ongoing Entity Management <u>Maintena</u>nce

SAM.Gov



✓ Keep Users and Roles current
 ✓ Adds, removes, and changes roles
 ✓ Reassigns the Entity Administrator role

DIAMD



Make sure JustGrants shows your current Entity Users
 Assigns users to Applications and Awards

JustGrants

Digital Identity & Access Management Directory (DIAMD)

- Allows entities to manage users and roles in JustGrants.
- Only the Entity Administrator can make changes in DIAMD.
- When the Entity Administrator assigns a role to a user, DIAMD sends an email to the user with instructions to create an account and log-in to JustGrants.

JustGrants Roles

There are six foundational roles created to ensure **Entity Users have** the authority and ability to carry out specific requirements and tasks.

ENTITY ADMINISTRATOR

Confirms information contained in the Entity Profile is current. Manages entity users, including user role assignments in DIAMD, and specific application and award-level assignments in JustGrants.

The person listed as the SAM.gov EBIZ Point of Contact will be the Entity Administrator.

APPLICATION SUBMITTER



Completes and submits applications on behalf of an entity, including Entity Assurances and Certifications.

AUTHORIZED REPRESENTATIVE

Must possess legal authority within an entity to accept awards. This action binds the entity to the award terms and conditions.



Submits programmatic-related award requirements, including Performance Reports, certain GAMs, and portions of the Closeout.



GRANT AWARD ADMINISTRATOR

Provides support to the Grant Award Administrator. Can initiate, but not submit, programmatic-related award requirements including GAMs.



FINANCIAL MANAGER

Certifies and submits financial information and all Federal Financial Reports on behalf of an entity.

Multiple roles can be assigned to a single user.

JustGrants Onboarding



After a user has been invited by the Entity Administrator in DIAMD, they MUST log in as an "Entity User" in JustGrants after creating their account.

Troubleshooting JustGrants Onboarding

Why can't I see the user?

Have the user locate their DIAMD e-mail, complete registration, and log in completely. If there are still issues, re-invite the user in DIAMD.

I can see the user, but their roles are incorrect. What should I do?

The Entity Administrator will need to open DIAMD, navigate to the manage user button and locate the user. Once the user record is open, the Entity Administrator can add or remove roles.

Can you now see the user and/or see their correct roles?

Yes, they are now fully onboarded and ready to receive assignment to specific applications or awards.



Invite Users and Assign Roles

Reassign Entity Administrator



Remove a Member



QUESTIONS: JustGrants Onboarding

Ongoing Maintenance

- Updating User Roles
- Assigning Users to Specific Awards
 and Applications



Ongoing Maintenance



✓ Keep registration active
 ✓ Keep contacts current (e.g., E-Biz POC)

SAM.Gov

DIAMD

- ✓ Keep Users and Roles current
- ✓ Adds, removes, and changes roles
- ✓ Reassigns the Entity Administrator role

DIAMD



Make sure JustGrants shows your current Entity Users
 Assigns users to <u>Applications</u> and <u>Awards</u>

JustGrants

Ongoing Entity Management Maintenance

Assign Users to Awards and Applications



QUESTIONS: Ongoing Maintenance



Resources

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JustGrants Training

justicegrants.usdoj.gov

- Job Aid Reference Guides
- Microlearning videos
- Recordings of past sessions
- Frequently Asked Questions (FAQs)
- Glossary terms



JustGrants Training Resources



The Department of Justice (DOJ) grant making components—the Office), the Office of Justice Programs (OJP), and the Office on to serve as a resource hub for their grants management system of which launched on October 15, 2020.





Job Aid Reference Guides

Organized by Topics

Micro-learning videos

Upcoming Sessions

MONDAYS from 1 PM to 2:00 PM Post-Award Management

- March 7, 2022
- March 14, 2022
- March 21, 2022
- March 28, 2022

KEY AUDIENCE: Grant Award Administrators Entity Administrators

Financial Managers

TUESDAYS from 2 PM to 3:00 PM Entity Management

- March 8, 2022 KEY AUDIEN
- March 15, 2022
- March 22, 2022
- March 29, 2022

KEY AUDIENCE: Entity Administrators

WEDNESDAYS from 2:30 PM to 4:00 PM Application Mechanics

- March 9, 2022
- March 16, 2022
- March 23, 2022
- March 30, 2022

KEY AUDIENCE:

Entity Administrators

- Application Submitters
- Authorized Representatives

THURSDAYS from 2 PM to 3:00 PM Award Acceptance

- March 10, 2022
- March 17, 2022
- March 24, 2022
- March 31, 2022

KEY AUDIENCE: Entity Administrators Authorized Representatives

JUSTICEGRANTS.USDOJ.GOV/Training/training-virtual-sessions

Questions and Answers

Please complete the survey that will open in a separate browser window



5

