Blueprint Definitions

Below are the definitions for each section covered in the Blueprint. The **bold** represents the 5 sections of the Blueprint document. The sections not in bold are sub-sections of the Process Outline.

Section	Definition
Table of Contents	Includes all categories in the Blueprint and includes page numbers next to each topic/category to assist with navigation.
Overview	Synopsis of the client's program
Stakeholders	Includes all of the participant groups in the client's program. This consists of the client's staff administering the program, applicants applying for your program to board members approving applications for awards.
Program Setup	Detail of all of the software components to the client's program, and who is responsible for the setup of those components.
Process Outline	Details the sequential steps all stakeholders must take in order to get through the process.
Staff Invites Applicants	Programs that require administrators to invite selected applicants.
Login/Profile	Walk through the steps an applicant will need to take in order to start the application process.
Application Intake	Details the process that applicants will take to complete their application. If your application requires multiple steps, letters of recommendations and/or other forms, they will be listed here.

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Program Staff Review	Details the steps administrators will take to review applications to move to the next step.
Changes Requested	Identifies changes or modifications to the applications.
Application Intake - Part II	This will be available if the client's program requires a second round of applicant submissions.
Committee Review	Identifies the committee or board review process.
Program Staff Decision Making	This is the process that the client's program staff will use to review, add comments, and update an application's status. The client will decide to award or not award an application.
Board Approval - Option 1 - Reports	Identifies the process for the Program staff to generate a Board report of recommended awards and how to update the system on award status.
Board Approval - Option 2 - Via Portal	Identifies the process that the Program staff will use to initiate Board approval, how the Board members are notified, how Board members view applications and submit approvals, and how the Program staff updates the system with Board disposition.
Not Awarded	Identifies the process of how the Program staff will decline applications and notify applicants that the application was denied.
Awarded	Identifies the process of how the Program staff will award applications, generate award notifications and agreements for reporting disbursements and milestones.
Agreement Acceptance - Option 1 - Download/Upload	Applicants will be able to view award details, scheduled disbursements and milestones,

Section	Definition
	and have the ability to download their agreement, sign it, and reupload the signed agreement.
Agreement Acceptance - Option 2 - DocuSign Integration	Program staff will generate the agreement using Zengine and adding document signature tags for the applicant to receive and sign the agreement in DocuSign. The Program staff will update the status of the application once received.
Progress Reporting	Grantees will submit their reports in the Submission Portal and the Program staff will review updated reports and update the status. Program staff can also generate email notifications to those that are not in compliance.
Milestone Reports	Grantees have the opportunity to view milestones that need to be completed, add comments, and attach proof for completing milestones.
Disbursements	Program staff will update the approval of disbursements, export reports for the finance team to complete payments, and update the status of the disbursement. Grantees can also view the status of disbursements from the Submission Portal.
Reimbursement Requests	Grantees can submit disbursement requests and view the status of those disbursement requests. Program staff will update the approval of disbursements, export reports for the finance team to complete payments, and update the status of the disbursement.
Amendment Requests - Option 1 (Offline)	Grantees can request amendments in an offline process, and Program staff can either approve or deny the request.

Section	Definition
Amendment Requests - Option 2 (In Portal)	Grantees can request amendments, extensions, or budget modifications via the portal., and Program staff can either approve or deny the request.
Unused Funds	Program staff calculates the amount of unused funds, notifies the grantee, and tracks any payment balances.
Renewals	Program staff follows the process for handling any renewals with the grantee.
Completed Grants	Program staff will verify that the grant is complete, verify all reports, update the status, and close out the grant.
Notes/Email/Phone Call Logs	Program staff can add a note, copy and paste an email, or log a phone call with a contact and relate it to a particular application.