

Grants Routing Request

Service Request Application

 =Warning  =Timesaver  =Note

About Grants Routing Request

The Service Request (SR) application is used for all grant related routing requests, including signature requests and grant approvals. Grant packages will be reviewed and approved by the appropriate offices within the Division of Administration including Grants, Accounting, Budget, and the Chief Administrative Officer (CAO). Once the package has been approved and signed by the CAO, our staff will route to the Office of the Superintendent for approval and signature before returning the completed package to you.

For grant support or help relating to the Grant Service Request form, please contact Ms. Annette Bartlett or Dr. Sandra Vecera.

Create a Grants Routing Request

1. Access the *Service Request (SR)* application from the **Staff Hub**.
2. Log into the SR application using your Active Directory credentials (staff login).
3. Select **Create New Request**.
4. From the **Select a request type to start** drop-down field, select **Grants Routing Request Form**.
5. From the **Type of Routing Request** field, select the appropriate type of routing request option.

Complete the Request Form

Complete the request form with as much detail as possible. This will help facilitate an efficient routing process. All fields on this form are required before submitting the request.

1. Enter the name of the grant in the **Item Title** field. The Grant request should be titled using the following format: Fiscal Year. Name of Grant. Example: *FY23. Bridges to Higher Learning*.
2. The **Originator Name** and **Request Date** fields automatically are filled in.
3. Enter a date in the **Request Due Date** field.
4. Enter the requested action with as much detail as possible in the **Brief Description of Requested Action** field.
5. Select *Yes* or *No* for the two questions (requires match and board approval) fields, if applicable.

Insert SharePoint Link to Grant Attachments

Prior to submitting your Grant Routing Request form, you will need to upload grant documents to the appropriate folder in the HCPSS Grants Management site in SharePoint. For additional assistance with SharePoint for Grant Packages, refer to the "*SharePoint for Grant Packages*" section at the end of this reference guide.



1. Enter the SharePoint link URL for the location of your grant documents within the HCPSS Grants Management site: <https://hcpss.sharepoint.com/sites/HCPSSGrantsManagement589>.
2. From the **Document Type** field, select the appropriate document type. You can test the link by selecting the **Test Link** button.
3. If necessary, select **Add** to provide additional SharePoint link URLs.

 **TIMESAVER:** If submitting multiple documents for review and/or for reference, you may choose to link to the **folder** containing all of the documents, instead of linking to each individual document.

Submit the Grants Routing Request

After completing the Grants request form, you will need to submit this request for routing approvals.

1. Click the green **Submit** button (lower right corner of the page). You will see a *Green Pop-up* box in the SR system letting you know your request was successfully submitted.

 **NOTE:** You do not need to select the **Save** button unless you do not want to submit the request into the workflow for approval. Selecting *Save* will only save the data in the service request but **DOES NOT** move this request into the approval process.

Status of the Grants Routing Request

You will receive email updates from the Service Request application as your request is being routed and approved. You can log into the SR application to check your request from the Dashboard.

SharePoint for Grant Packages

Before you submit your Grant Routing Request, you will need to upload your grant documents to the appropriate folder in the HCPSS Grants Management SharePoint site by following the steps below. For additional assistance with SharePoint, or to be added to this SharePoint community, please contact Ms. Annette Bartlett.

1. Navigate to the HCPSS Grants Management SharePoint site:
<https://hcpss.sharepoint.com/sites/HCPSSGrantsManagement589>.
2. Select **Documents** and then **General**.
3. Select '**Central Office**' or '**School-Based**' depending on your role.
 - For Central Office grants, select your Division or Department, then the relevant fiscal year folder.
 - For School-Based grants, select your school's folder, then the relevant fiscal year folder.
4. Select the subfolder associated with your grant program. If this folder does not exist, please create a new subfolder labeled with the name of your grant program.
5. Upload your documents to the subfolder.
6. Copy the URL link(s) associated with this subfolder, or with each relevant document, and paste these links into your grant routing request form.

