# Managing Tasks in eCivis – Prime Recipient (Grantee)

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## Task Functionality and Helpfulness

The task functionality in eCivis allow you to streamline business processes in a central hub. You can assign tasks to yourself and colleagues, set up approvals, create recurring tasks, and upload documents to share with team members.

This guide will assist you in selecting the task type that is best for your needs,-and learn how to best implement that task within the eCivis system.

# Selecting Appropriate Task Type

### Simple vs. Advance Tasks

eCivis has two task options, simple and advanced. The complexity of the task you are creating will determine which task type to choose. See below to determine which fits your needs best.

Simple Tasks have two roles:

- 1. User that creates the task
- 2. Assigned To user or group the task is assigned to. The user that creates a task may assign it
  - to themselves, to another user, or to a group. Assigned users are responsible for completing the task, and marking it *Done.*

Advanced Tasks have a third role:

3. *Approver* - user or group able to approve, reject, or request additional information. Approvers do not have access to the task until the Assigned users have marked it Done.

Simple Task: Allows for selection of task type, custom name, assigning task to specific user, task due date, task reminder date, and task description

Advanced Task: Includes functionality from simple task as well standard or sequential task approvals, option to block grant progress if task has not been completed, and task repetition option. You may want to upgrade to an advanced task if you

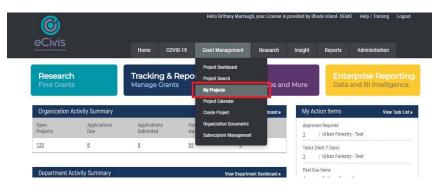
- $\circ$  Want task to be approved by a single user or multiple people in a sequential order
- $\circ$   $\;$  Want to ensure grant is not moved into a new stage until this task is completed
- o Want a task to repeat on scheduled basis

Now that you have chosen a task type, please follow to user instructions below on the set up of a simple or advanced task, as well as examples of tasks that would fit into either category.

## Setting Up Simple Task

Project Dashboard: Test

- 1. Login to eCivis
- 2. Hover over the "Grants Management" tab and select "My Projects"



- 3. Select the project you would like to create a task for
- 4. Click on the "Add Task" button at the bottom of the screen

Department: Department of Administration Data Integration Options Project Options Goals & Metrics Grant Lifecycle Budgets Contracts & Accounts Documents Spending History oject Team 🥜 💿 ctive Grants 🔍 🔞 FD12693 National Police Dog Foundation (NPDF) - FY 2023 B. Murtaugh (Lead) Programming Se. Stage: Grant Awarded Awarded: \$1,000,000.00 \* Match: \$0.00 Available Actions O I would like to access details of this gran I would like to access defails of this grant
 I would like to access defails of this grant
 I man ready to schedule my report
 This grant does not require a report
 I have received a grant adjustment notice and need to amend my grant agrees
 I would like to view/manage my contract & account details
 I would like to reate/manage a addget for this grant
 I would like to create/manage a budget for this grant \*These funds have been made available for pass-through funding Completed Tasks Approval History There are no pending tasks assigned to this project. Click the button below to add a task Add Task Task Report Refresh

#### 5. Select "Simple Task" and select next

Add a Nev	w Task		0
۲	Simple The 'Simple'	pption covers most use cases, and allows you to assign a basic t	task with a due date
0	Advanced	p	
0	The 'Advance	d' covers advanced functionality like Approvals, Multiple Remind 'Simple' does not meet your needs.	ders, or Required Tasks. Select
	uns option n	Simple does not meet your needs.	
1	Next >	Cancel >	

- 6. Select your task type
  - Miscellaneous tasks: Simple Yes or No tasks typically used to mark something "complete"
  - Scheduled Report: Reports you may want periodically such as budget, program, updates etc. (see advanced task set up section)
- 7. Create a name for your task make it descriptive enough so the people you are sharing with understand the meaning
- 8. Select the grant that is associated with the task you are creating
- 9. Assign the task to an individual or a user group
  - User groups can be created by Department Master Account Holders in the Administration Group Manager tab in eCivis
- 10. Select a due date you want this task completed by the assignee
  - a. Optional: Set a reminder date for the task assignee about their task
  - b. Optional: Upload any files relevant to the task for the assignee to view
  - c. Optional: Add a task description assignee has more information on what they are being asked to complete
- 11. Click Save

imple Task Wizard		
Task Type*:	Miscellaneous Task	~
Name*:	Budget Check	
Grant*:	US8780 Standing Announcement for Tribal Title IV-E Plan	Development Grants - FY 2022-20;
Stage*:	Grant Awarded	~
Task Scoring Rubric:	None	•
Assigned To*:	Brittany Murtaugh	~
Due*:	10/31/2023	
Reminder:	10/24/2023	
Files:		
Task Description:	Please check the budget and ensure there are no errors	
	945 Characters Left	
Save )	Cancel )	

TIP: Now that your task has been created, it will be active in eCivis and you will now be able to view it in your Project Dashboard. Other tasks that have previously been created and are unfinished will display here as well

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TIP: Any user you assigned to the task, or who was a member of the user group you assigned to review will get also get an email alerting them there is a task that needs their attention

## Example of Simple Task Set Ups

### **Request Budget Review**

A program staff person may want a finance colleague to check their budget breakdown in eCivis before locking the budget. A simple task can be created to request this review. See below for an example of how you may create this task in eCivis.

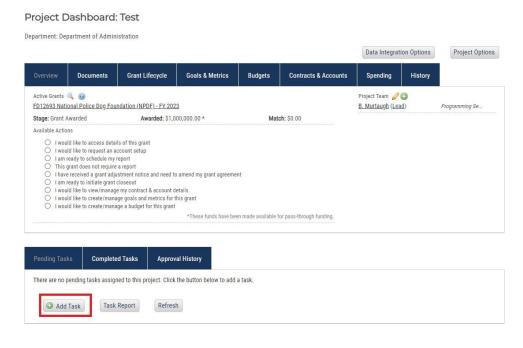
Simple Task Wizard		x
Task Type*:	Miscellaneous Task 🗸	
Name*:	Budget Check	
Grant*:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-202. 💙	
Stage*:	Grant Awarded 🗸	
Task Scoring Rubric:	None	
Assigned To*:	Brittany Murtaugh	
Due*:	10/31/2023	
Reminder:	10/24/2023	
Files:		
Task Description:	Please check the budget and ensure there are no errors	
	945 Characters Left	e
Save >	Cancel	

## Setting Up Advanced Task

- 1. Login to eCivis
- 2. Hover over the "Grants Management" tab and select "My Projects"

A Euro Solutions Brand		Home	COVID-19	Grant Management	Research	Insight	Reports	Administration
Researc		Tracking		Project Dashboard Project Search		Marra		erprise Reporti
Find Gran	ts	Manage Gra	ants	My Projects	: es and	More	Data	and BI Intelligend
Organization	Activity Summary			Project Calendar Create Project	board »	My Ac	tion Items	View Task I
Open Projects	Applications Due	Applications Submitted	Fur Aw	Organization Documents Subrecipient Management		Approva 1	als Required   Urban Forestr	y - Test
	8	8	85				Next 7 Days)	

- 3. Select the project you would like the create a task for
- 4. Click on the "Add Task" button at the bottom of the screen



5. Select "Advanced Task"



6. Step 1: Fill out relevant information pertaining to your task

Task Type*:	Miscellaneous Task 🗸	
Name*:	Test Task 100	]
Grant*:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-20; 💙	
Stage*:	Grant Awarded	
Task Scoring Rubric:	None	
Files:		
Task Description:	Please review attached document for errors/typos	
	951 Characters Left	6

- 7. Step 2: Select your approval workflow and (optional) "required" blocking (explanation below)
  - a. Standard: requires an approval by an assigned approver or approval group. In a group, any member can approve
  - b. Sequential: requires each approval group member to approve the task in a specified order, one after another.
  - c. Required Blocking: Prevents the grant from moving forward to a new stage until the task is complete.
    - i. For example, if required blocking is selected, the grant cannot be moved from award pending to grant awarded stage in eCivis until the task is completed/marked *Done*.

vanced Tas	Wizard	X
Step 1	Step 2         Step 3         Step 5	0
ask Options		
	oproval	
	) Standard	
	Standard' approvals require an approval by an assigned approver or member of an approval group. In a group, any member an approve.	
	Sequential	
	Sequential' approvals are those that require each approval group member to approve in a specific order, one after another.	
Previo	is Next Cancel	

- 8. Step 3: Assign Task and User Group
  - a. Assign to: Who do you want completing this task
  - b. Approver: Who do you want approving this task
    - i. User: a single user
    - ii. User Group: a group you previously created in eCivis. This may be your grant project team, finance/budget staff, or other individuals working on this project.

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si	gnated for approval	gnated for approval. The group is ba	gnated for approval. The group is based off Approv		gnated for approval. The group is based off Approval Type in previous step.

- 9. Step 4: Set task due date and reminder
  - a. Due date for the task is required, and reminder date/s are optional. The person who is assigned to the task will receive the reminders via email.

dvanced Task Wizard				X
Step 1 S	tep 2 Step 3	Step 4	Step 5	Θ
Due*:	10/31/2023			
Reminder: 💿	10/24/2023			
Previous	Next Cancel			

#### 10. Step 5: Recurring task

a. If you want this task to repeat on a scheduled basis, select "Task repeats". You can then set up the frequency of your task depending on your needs. If you do not want your task to repeat, select "Task does not repeat".

Advanced Task Wizard X	Advanced Task Wizard X
Step 1         Step 2         Step 3         Step 5	n Step 1 Step 2 Step 3 Step 4 Step 5
Task Recurrence	Task Recurrence
Task does not repeat	a O Task does not repeat
O Task repeats	Task repeats
	Frequency*: Monthly ~
	Interval*: Every month
	On*:
	15 -
	D O The last day of the month
	0 Starting*: 10/31/2023
	Create*: One week before due date
	Create with a reminder
	7 Until: 10/31/2025
Previous Save Cancel	Previous Save Cancel

#### 11. Click Save

- a. If you are happy with your task set up, click save to complete your task. If you need to make changes, you can go back to any of the previous steps and make edits as needed.
- TIP: Now that your task has been created, it will be active in eCivis and you can view in your Project Dashboard. Reminder, previously created tasks that have not been completed will also be viewable in this area.

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- TIP: The task will need to be completed by the person assigned to complete the task before it is sent the designated approvers
- > TIP: Approvers will get an email notification when the user who the task was assigned to completes the task

# Example of Advanced Task Set Ups

### Request Approval Before Submitting Application

Before submitting an application, you may want other members of your team to review your application. You can upload a PDF, screenshots, or other application materials to a task for them to review. If you set up the task with sequential reviewers, multiple people can have approval authority. Mark yourself as the "Assigned to" and select the user group who you would want to review your application. Alternatively, you can assign the task to the individual completing the application if you need to be the final approver.

Advanced Task Wizard	X	Advanced Task Wizard	x
Step 1 St	tep 2 Step 3 Step 4 Step 5	Step 1         Step 2         Step 3         Step 4         Step 5	Θ
Task Type*:	Miscellaneous Task 🗸	Assigned To*: Brittany Murtaugh	
Name*:	Review Application Materials	Distanty multitagen Designated for Approval*:	
Grant*:	US0483 Emergency Community Water Assistance Grants (ECWAG) - FY 2023	User Choose a user that will be designated as approver	
Stage*:	Application Preparation	Select Department	
Task Scoring Rubric:	None	Select User	
Files:		User Group     Choose a user group that will be designated for approval. The group is based off Approval Type in previous step.	
	Test document.docx (11.7 Kb)		
Task Description:	Hello,	GMO - Test Group	
	Please review attached application materials before we submit.		
1	930 Characters Left		
Next Car	icel	Previous Next Cancel	
(			

### Upload Financial Documents (Recurring Task)

If your federal awarding agency requires reports to be completed, or there are other recurring internal reports or tasks you need to complete on a quarterly/recurring basis, it may be helpful to set up a recurring task for yourself and/or others on your team to upload copies to eCivis for recordkeeping. Below is an example of a recurring task that demonstrates personal reminders for uploading backup documentation for federal drawdowns, with an approver (potentially finance staff).

Advanced Task Wizard	x	Advanced Task Wizard X
Step 1 S	tep 2 Step 3 Step 4 Step 5	Step 1         Step 2         Step 3         Step 4         Step 5
Task Type*: 	Miscellaneous Task	Task Options         Image: Approval         Image: Standard         Standard approvals require an approval by an assigned approver or member of an approval group. In a group, any member can approve.
Grant*: Stage*: Task Scoring Rubric:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-20;  Grant Awarded None	Can approve.  Sequential Sequential Sequential approvals are those that require each approval group member to approve in a specific order, one after another.  Required The 'required' flag blocks the grant from moving to the next stage if the task has not been completed.
Files: Task Description:	Test document.docx (11.7 Kb) Federal drawdown documents (period January - June 2023)	
Next Car	945 Characters Left	Previous Next Cancel

Advanced Task Wizard X	Advanced Task Wizard X
Step 1 Step 2 Step 3 Step 4 Step 5	Step 1 Step 2 Step 3 Step 4 Step 5
Assigned To*:	Due*: 10/31/2023
Brittany Murtaugh	Reminder: 3 10/24/2023
Designated for Approval*:	
User Choose a user that will be designated as approver	
Department of Administration	2
Katje Benolt	2
User Group Choose a user group that will be designated for approval. The group is based off Approval Type in previous step.	
Select User Group	
Previous Next Cancel	Previous Next Cancel
Advanced Task Wizard x	
Step 1         Step 2         Step 3         Step 4         Step 5         Image: Control of the step 3         Image: Contrest 3         Image: Control of the step 3	
Task does not repeat	
Task repeats	
Frequency*: Monthly ~	
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Interval*: Every month	
On*: O A day of the month	
Select Day 🗸	
The last day of the month	
Starting*: 10/31/2023	
Create*: One week before due date	
Create with a reminder	
Until: 10/31/2025	
Previous Save Cancel	

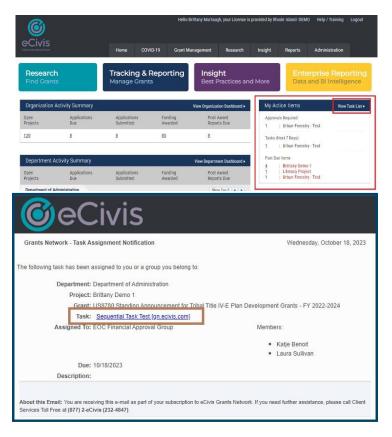
### IAA-FF Billing via Scheduled Report Set Up

Within the Select Report Type area of the Report Submitted form, you will have the option of indicating whether or not the report includes spending information. If so, clicking "yes" will allow you to enter the start and end dates of the spending period, the amount spent, and the amount of reimbursement requested, if applicable. You will also have the option of designating the report as the Final Report. Any report marked as a Spending Report, along with all of the information related to that report, may be accessed through the Spending Report link on the Project Dashboard.

Advanced Task Wizard	x	Advanced Tas	k Wizard				X
Step 1	Step 2         Step 3         Step 4         Step 5	Step	1 Step 2	Step 3	Step 4	Step 5	Θ
Task Type*:	Scheduled Report	Task Option					
Name*:	Advanced Scheduled Report Task		Required equired' flag blocks th	ne grant from movir	g to the next stag	e if the task has not been completed.	
Grant*:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-202.	2					
Task Scoring Rubric:	None	2					
Files:		2					2
Task Description:	Reporting spending for IAA-FF						
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		_					
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Next	Cancel	Previ	Next	Cancel			
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Advanced Task Wizard	x	Advanced Ta	sk Wizard				x
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Assigned To*:							
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		F Reminder:	٢	10/24/2023			
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Advanced Task Wizard	x						
Step 1	Step 2 Step 3 Step 4 Step 5						
Task Recurrence							
<ul> <li>Task does not re</li> </ul>	peat						
Task repeats		F					
Frequency*:	Monthly						
Interval*:	Every 3 months	2					
On*:	O A day of the month	6					
	Select Day 🗸						
	The last day of the month						
Starting*:	10/31/2023						
Create*:	Two weeks before due date						
	Create with a reminder						
Until:	10/31/2024						
Previous	Save Cancel						

## How to Complete Tasks Assigned to You

When a task is assigned to a user, they will receive an email from eCivis with the details of that task. You can view the task in eCivis by following the hyperlink in the email. Additionally, your assigned tasks can be found by navigating to "My Action Items" - "View Task List" on the eCivis homepage. All tasks can be found at the bottom of the "Project Dashboard" for the project the task is assigned to.



 Clicking on the hyperlink in the email, or the by clicking "View Task List" and navigating to the appropriate Project Dashboard, you can see all pending tasks, when they are due, and who they are assigned to. To complete the task, click the box under "Done", which will be available if the task is assigned to you.

								Data Integrati	ion Options	Project (	ption
Dverview	Documents	Grant Lifecycle	Goals & M	letrics E	Budgets	Contracts & Act	counts	Spending	History		
Active Grants 🔍 FD20214 ProLiter		tunity Fund - FY 202	3					Project Team 🥜 B. Murtaugh (Lea		Programming S	e
Stage: App. Prepa	ration	Projected	l: \$100,000.00		Match	\$0.00					
Available Actions											
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I am read     I will not a     I would like	y to submit my applic apply for this grant te to create/manage										
I am read I will not a I would like I would	y to submit my applic apply for this grant te to create/manage	cation goals and metrics for a budget for this gram								_	
I am read I will not a I would like I would	y to submit my applic spily for this grant te to create/manage te to create/manage Completed 1	cation goals and metrics for a budget for this gram		Stage	Assigned T	3	Due	Reminder	F	ile(s)	Done
I am read     I will not a     I would lik     I would lik     I would lik Pending Tasks Task I	y to submit my applic spily for this grant te to create/manage te to create/manage Completed 1	cation goals and metrics for a budget for this gram	val History	Stage Application Preparation	Assigned T B. Murtaug		Due 10/02/20:			file(s)	Done

3. Follow the steps to complete the task <u>and click Save</u>. Steps may vary depending on the type of task that is created. See example below for a Miscellaneous Task and Scheduled Report Task.

#### Miscellaneous Task Example

Approval Request Form Approval Request Form Project: Brittany Demo 1 US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022-2024 Grant: Task: Rost Approval: Test Task 100 Attachments 🕥 : Please review attached document for errors/typos Description: Approver: Test Group - BMW ..... Approval Due\*: 10/31/2023 . Reminder: 🕥 Files to Forward (): No files are currently attached. Notes to Approver: 1000 Characters Left Save Cancel Cancel

#### Scheduled Report Task Example

Complete Status Form		
Grant:	US8780 Standing Announcement for Tribal Title IV-E Plan Development Grants - FY 2022- 2024	
Report Name *:	Test Schedule	
Submitted On *:	10/31/2023	
Submitted By *:	Brittany Murtaugh	
Notes:		
	1000 Characters Left	
	1000 Characters Left	
elect Report Type @	1000 Characters Left	
Select Report Type 🕤		
	000 Churcters Left ○ Yes ○ No	
s this a Spending Report? *		
s this a Spending Report? *	○ Yes ○ No	
s this a Spending Report? *	<ul> <li>○ Yes</li> <li>○ Yes</li> <li>● No</li> </ul>	
s this a Spending Report? *	<ul> <li>○ Yes</li> <li>○ Yes</li> <li>● No</li> </ul>	

4. Completed tasks can always be viewed for reference. At the bottom of your Project Dashboard, select the "Completed Tasks" tab. A page with all submitted tasks will now open, including the attached files, notes, and additional information.

US8780 Standing /	Announcement for Tribal Title IV-E P	lan Development Grar	nts - FY 2022-2024						Minimize
Stage	Task Name	Due	Completed On	Completed By	Download Files	Manage Files	Edit Task	Scoring Rubric	Notes
Grant Awarded	Sequential Task Test	10/18/2023	10/18/2023	K. Benoit			a	a	
Grant Awarded	Test Task - BWM	10/18/2023	10/18/2023	K. Benoit Dept		-	0	0	
Grant Awarded	Rqst Approval: Test 101	10/18/2023	10/18/2023	B. Murtaugh				0	
Grant Awarded	Approval Reqd: Test 101	10/18/2023	10/18/2023	K. Benoit				2	
Grant Awarded	-Approved	10/18/2023	10/18/2023	K. Benoit					
Grant Awarded	Test Task 100	10/24/2023	10/24/2023	L. Sullivan			2	0	

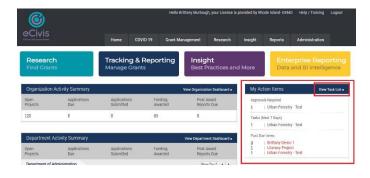
Done >

5. Once the task is completed, if there is an individual or user group that was selected as the approver, the task will then move on to them for approval.

## How to Complete Tasks as a Reviewer

When a user is requested to review a task, they will receive an email from eCivis with the details of that task. You can
view the task in eCivis by following the hyperlink in the email. Additionally, tasks for your approval can be found by
navigating to "My Action Items" - "View Task List" on the eCivis homepage. All tasks can be found at the bottom of the
"Project Dashboard" for the project the task is assigned to.

@eC	Civis	
Grants Network - Approv	al Request Notification	Monday, October 23, 2023
The following item has been	n submitted for your approval:	
Department:	Department of Administration	
Project:	Clean Water [gn.ecivis.com]	
Grant:	US5071 Occupational Safety and Health Training Project Gra	nts (T03) - FY 2022-2026 [gn.ecivis.com]
Project Lead:	Katje Benoit, Grant Management Specialist	
	Katje.Benoit.CTR@omb.ri.gov	
	518-339-7719	
Requester:	Katje Benoit	
Task:	Approval Reqd: Misc Task - BM Approver	
Response Due:	10/27/2023	
Notes:	task complete, ready for approval	
Click here to access the Ap	proval Response Form (gn.ecivis.com)	
	the sender of this email directly, please select the requester's email ad nts Network. If you need further assistance, please call Client Service:	



2. By following the link in the email received, you will be taken directly to the "Approval Response Form". Approvers can review any information or uploads the task assignee has included, and then choose to approve, deny, or request additional information for the task.

Approval	Response	Form
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Approval Response F	orm
Project:	Clean Water
Grant:	US5071 Occupational Safety and Health Training Project Grants (T03) - FY 2022-2026
Task:	Approval Reqd: Misc Task - BM Approver
Project Lead:	Katje Benoit, Grant Management Specialist <u>Katje Benoit: CTR@omb.ri.gov</u> 518-339-7719
Attachments 😡 :	
Project Documents 👩 :	
Notes from Requester:	task complete, ready for approval
Request Approved?*:	Yes O No O Request Additional Information
Notes:	Approved by BWM - 10/23/2023
	971 Characters Left

Save ) Cancel )

3. Once a selection has been made, the assignee of the task will be notified via email. If the task was sent back for additional information, the assignee will need to complete those updates and follow the same process to re-submit for approval. The task will then move to the "Completed Tasks" section of the Project Dashboard"

@e(	Civis	)					
Grants Network - App	roval Response Noti	fication				Monday,	October 23, 202
The following item has be	en submitted in respor	ise to a requ	est for appro	oval:			
Departme	nt: Department of Adr	ninistration					
Proje	ct: <u>Clean Water [gn.e</u>	civis.com]					
Gra	nt: US5071 Occupation	nal Safety a	nd Health Tr	aining Project Gra	nts (T03	) - FY 2022-2026	[gn.ecivis.com]
Project Lea	ad: Katje Benoit, Gran Katje.Benoit.CTR( 518-339-7719	and the second se	nt Specialist				
Approv	er: <u>Brittany Murtaugh</u>						
Ta	sk: Approval Reqd: Mi	sc Task - BN	1 Approver				
Approval Respons	se: Approved						
Note	es: Approved by BWN	- 10/23/202	3				
Home / Project Calendar / Project Dashb							
Department: Department of Adminis							
reparation: Department of Hammis	and ton				Da	ta Integration Options	Project Options
Overview Documents	Grant Lifecycle Goa	Is & Metrics	Budgets	Contracts & Account	s Sp	ending History	
Active Grants 🔍 🎯	Conservation Grant (NCWCG)	Program (Select S	tates) - EV 2023			t Team 🥜 🚳 hoit (Lead)	Grant Manageme
					15, 19,1	1011 (LC00)	
US1768 National Coastal Wetlands Stage: App. Submitted				0.00	B. Mu	rtaugh	Programming Se
US1768 National Coastal Wetlands Stage: App. Submitted US5071 Occupational Safety and Hi	Projected: \$50,000.00		Match: \$50,00	0.00	B. Mu S. Sm	rtaugh ith	Programming Se Programming Se
Stage: App. Submitted	Projected: \$50,000.00		Match: \$50,00	0.00	<u>S. Sm</u>		
Stage: App. Submitted US5071 Occupational Safety and H	Projected: \$50,000.00 ealth Training Project Grants (T		Match: \$50,00	0.00	<u>S. Sm</u>	ith	Programming Se
Stage: App. Submitted US5071 Occupational Safety and H	Projected: \$50,000.00 ealth Training Project Grants (T Awarded: \$10,000.00 *	03) - FY 2022-202	Match: \$50,00	0.00	<u>S. Sm</u>	ith	Programming Se
Stage: App. Submitted US5071 Occupational Safety and H Stage: Implementation	Projected: \$50,000.00 ealth Training Project Grants (T Awarded: \$10,000.00 *	03) - FY 2022-202	Match: \$50,00		<u>S. Sm</u> <u>S. The</u>	ith	Programming Se
Stage: App. Submitted US5071 Occupational Safety and H Stage: Implementation Pending Tasks	Projected: \$50,000,00 ealth Training Project Grants (T Awarded: \$10,000,00 *	03) - FY 2022-202 ry Stage : Grant	Match: \$50,00 6 Match: \$0.00 Assigned	To Due	<u>S. Sm</u> <u>S. Thr</u>	ith mpson Reminder F	Programming Se test