Navigating G5 and RSA.ED.GOV

Presenters:

Sean Barrett, Financial Management Specialist
Rehabilitation Services Administration
U.S. Department of Education

Ken Schellenberg, Information Technology Specialist
Rehabilitation Services Administration
U.S. Department of Education
What is G5?

• G5 (www.g5.gov) is the Department of Education’s grant management system. Grant Award information, including the Grant Award Notifications and terms and conditions (i.e. attachments) are accessed through G5.

• Once awarded by RSA, the drawdown of funds, and potentially the return of funds (depending upon the State), is managed through G5.

• RSA.ED.GOV and G5 are NOT electronically linked to permit direct data exchange.
How do I Obtain a User ID and Password to Access G5?

If you haven't registered for a G5 account, please go to www.g5.gov and click on the "New User" link under the G5 login box and following the instructions to complete the online registration.

RSA Financial Management Specialists cannot access G5 user accounts.
Who has Access to Award Information in G5?

G5 allows for two roles that can be associated with any given award, **Recipient State Director (RSD)**, and **State Authorizing Official (SAO)**.

- In almost every case, the RSD is the individual who heads the DSA and signs the Unified or Combined State Plan, while the SAO is the head of DSU (There is an exception for accessibility and turnover).

- Either of these roles can be designated to another person, but only by the person who initially held the role.

- If the DSA has formally delegated authority to the DSU to sign the Unified or Combined State Plan, then the DSU director must be designated as the RSD, and the DSA director must be designated as the SAO in G5.
Who has Access to Award Information in G5? (cont.)

• If the DSA is the DSU, then the DSA Director is listed as both the RSD and SAO in G5.

• The DSU Director is the VR Director, and should be the individual identified as the primary State VR contact in public-facing areas like RSA.ED.GOV.

• Only the RSD’s name is listed on the GAN.
How to Request a Change to the RSD or SAO for an Award?

• Your RSA Financial Management Specialist or Program Liaison can assist in changing the RSA or SAO for a grant award(s).

• Please send an email indicating which award numbers need to be changed and the individuals who should hold each role. Be sure to indicate if this is new staff taking the role or if the role is being delegated from the previous holder.

• The email mail could include a scanned letter signed by individuals in the roles, or could include text in an email. Each person in the designated role should then reply to the email confirming their approval of the roles stated in the email.
Using the Information

Regardless of who is the RSD and/or SAO, RSA strongly encourages States to implement a policy and practice for downloading attachments and sharing that information with any staff responsible for assuring compliance with requirements included in the award.

*Note:* Each award includes not only award amounts, but often numerous pages of “Attachments”. These attachments represent the legal terms and conditions for implementing the award and should be reviewed, in total and made available to appropriate staff.
Special Considerations

To meet accommodation needs, G5 designations may vary somewhat from the above guidance. For example, if a VR Director who is blind has been delegated authority to sign the Unified or Combined State Plan, the VR Director may designate an individual other than the DSÁ Director to be listed as the SAO. In such cases, RSA staff should identify the specific arrangement in the notes column of the spreadsheet and update the grant file in G5 with documentation of the DSU’s agreement with the arrangement.

Please note that recent changes to G5 have ensured that the Grant Award Notifications are accessible.
Who Should I Contact for Assistance?

• If the question is related to accessing or using G5, please contact the G5 Hotline at 1-888-336-8930 (TTY Telephone: 1-866-697-2696). Grantees can also send questions and concerns via Email to: edcaps.user@ed.gov.

• If the question relates to assignment of the RSD or SAO, please contact your RSA Financial Management Specialist or Program Liaison.
RSA.ED.GOV collects information from RSA grantees regarding performance and expenditures under RSA grants to support a wide array of programs supported by:

• collecting and disseminating performance and financial reports for over a dozen RSA programs; and

• allowing Basic Vocational Rehabilitation (VR) grantees to upload data on the RSA-911 Case Service Report.
What's Available?

- Policy Information
- Fiscal Resources
- Grant Award Information
Policy Information

- Legislation
- Regulations
- Sub-Regulatory Guidance
  - Policy Directives (PDs)
  - Information Memoranda (IMs)
  - Technical Assistance Circulars (TACs)
How to Find Policy Information

• Available on the menu
  - Click About RSA
  - Click Legislation and Policy

• Available on the footer

VISION 2020
The Legislation and Policy screen allows you to view legislation and policy by program, or by type.

- **By Program** – on this tab, click on the program name to view policies related to that program
- **Legislation** – on this tab you’ll find links to the *Rehab Act* and other RSA-related legislation
- **Regulations** – on this tab you’ll find links to regulations published in the *Federal Register*
- **Subregulatory Policy** – on this tab you’ll lists (by date and name) of
  - All Sub-Regulatory Guidance
  - Policy Directives
  - Information Memoranda
  - Technical Assistance Circulars, and
  - Other Documentation Supporting RSA Programs
RSA has developed a *Fiscal Resources* page with info about:

- General information
- Technical Assistance on Pre-Employment Transition Services Expenditures
- Frequently Asked Fiscal Questions—Pre-Employment Transition Services
- Federal Financial Reports (SF-425)
- Match
- SMPID Formula Grant Programs—Minimum Award Calculations
- State Vocational Rehabilitation Services Reallotment Data
How to Find *Fiscal Resources*

- **Available on the Footer**

  ![Footer Resources Menu](image)

  Then select the tab *Resources available on ED.GOV*

- **Available on Search**

  In the *Search* box type *Fiscal Resources* and click the button

![Search Bar](image)
Fiscal Resources contains seven sections

• General information
• Frequently Asked Fiscal Questions
• Federal Financial Reports (SF-425)
• Match
• SMPID Formula Grant Programs—Minimum Award Calculations
• State Vocational Rehabilitation Services Reallotment Data
Fiscal Resources – General Information

The first section of the *Fiscal Resources* page contains information about

• Due dates on SF-425s
• Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards: Technical Assistance for ED Grantees
• Accessing and Initiating Changes to Formula Grant Award Notifications
• ED Memoranda & Guidance for Grantees, and
• Email Updates.
The second section of *Fiscal Resources* contains links to Frequently Asked Questions (FAQs) about

- *Pre-Employment Transition Services* and
- *Period of Performance*
The next section contains links to policies specifically related to Federal Financial Reports (SF-425)

• PD-15-05—"Revisions to PD-12-06, instructions for completing the Federal Financial Report (SF-425) for the State Vocational Rehabilitation Services program"

• PD-11-03—"Instructions for completing the Federal Financial Report (SF-425) for other formula grant award programs"
Fiscal Resources - Match

This section contains a link to the *Match Calculator* on *rsa.ed.gov* (This is also available on the *Tools* menu in the footer.)
The next section contains a table of how minimum award amounts are calculated

<table>
<thead>
<tr>
<th>Title</th>
<th>Program</th>
<th>State Min.</th>
<th>Territory-FAS Min.</th>
<th>Legal Citation</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Basic VR - State Grants</td>
<td>$3,000,000 or 1/3 of 1% of appropriated amount, whichever is greater</td>
<td>None</td>
<td>Rehabilitation Act – Subsection 110(a)(3)</td>
</tr>
<tr>
<td>I</td>
<td>Client Assistance Program</td>
<td>$50,000 After appropriations exceed $7.5 million, States receive $100,000</td>
<td>$30,000</td>
<td>Rehabilitation Act Section 112(e)</td>
</tr>
<tr>
<td>VII</td>
<td>Independent Living for Older Individuals Who Are Blind – State Grants</td>
<td>$225,000 or 1/3 of 1% of amount appropriated, whichever is greater</td>
<td>$40,000</td>
<td>Rehabilitation Act Section 752(j)</td>
</tr>
<tr>
<td>VI-B</td>
<td>Supported Employment – State Grants</td>
<td>$300,000 or 1/3 of 1% of appropriated amount, whichever is greater</td>
<td>1/8 of 1% (0.00125) of appropriated amount</td>
<td>Rehabilitation Act – Subsection 622(a)</td>
</tr>
<tr>
<td>V</td>
<td>Protection and Advocacy for Individual Rights</td>
<td>$100,000 or 1/3 of 1% of appropriated amount, whichever is greater</td>
<td>$50,000</td>
<td>Rehabilitation Act-- section 509((c)(3)</td>
</tr>
</tbody>
</table>
The final section contains a table of State VR Services Reallocation Data for the most recent Fiscal Year.
Grant Award Information

Information about Grant Awards can be found in three places on the RSA.ED.GOV site
• The Program information page
• The Grant Award page
• Ad Hoc Query
Grant Award Information on the Program page

• Each RSA program has its own page (see About RSA then Programs)
• Select the program, then click on the Awards dropdown
• The system shows a table of awards by state

<table>
<thead>
<tr>
<th>State</th>
<th>Grantee</th>
<th>PR Award ID</th>
<th>Current Awards FY 2018</th>
<th>Total Awarded FY 2017</th>
<th>Total Awarded FY 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alabama</td>
<td>Alabama Department of Rehabilitation Services</td>
<td>H126A180062</td>
<td>$54,618,191</td>
<td>$65,201,286</td>
<td>$62,990,567</td>
</tr>
<tr>
<td>Alaska</td>
<td>Alaska Dept of Labor and Workforce Development - Division of Vocational Rehab</td>
<td>H126A180001</td>
<td>$9,023,736</td>
<td>$10,710,782</td>
<td>$10,393,765</td>
</tr>
<tr>
<td>Arizona</td>
<td>Arizona Rehabilitation Services Administration</td>
<td>H126A180002</td>
<td>$61,712,712</td>
<td>$72,621,723</td>
<td>$85,601,468</td>
</tr>
<tr>
<td>Arkansas</td>
<td>Arkansas Division of Services for the Blind</td>
<td>H126A180004</td>
<td>$3,934,198</td>
<td>$5,365,514</td>
<td>$6,577,854</td>
</tr>
<tr>
<td>Arkansas</td>
<td>Arkansas Rehabilitation Services</td>
<td>H126A180003</td>
<td>$28,850,787</td>
<td>$35,174,751</td>
<td>$40,420,525</td>
</tr>
</tbody>
</table>
Grant Award Information on the Grant Award page

- Each grant award has its own page which shows award details.
How to get to the Grant Award page

There are several ways to get to the page for your award

• Click on your award number on the Program page

• Type your award number in the Search box

• TIP: for Basic VR awards, type your four character agency code in Search: i.e. CA-C or AR-G or CT-B
Grant Award Information in Ad Hoc Query

• The Ad Hoc Query option is available under Tools in the menu or footer
• The first AHQ option is Query Grant Awards
Grant Award Ad Hoc Query

Query - Grant Awards

Instructions: How to run an Ad Hoc Query

Step 1: Set the criteria

To limit the data returned, set the criteria below. Only rows which match all of the criteria will be shown. You don’t need to enter a choice on every line; leave a line blank if you do not want to filter on that line.

FY
RSA Program
State Code
Agency Type
Grant Award Number

Step 2: Choose type(s) of data to include

This form has the following groups of data elements. Check the group or groups of data you would like to view in your query. You must select at least one group.

- Grant Awards
- Grant Award Details
- Grant Award Contact Info
- DSU / DSA Contact Info

Run Query
One more tip: Fiscal Info on Data Entry

• Within Data Entry, there’s a spot on the SF-425 (and also on other forms) for *Other related documents*
Questions?

If you have additional questions, please email them to RSAfiscal@ed.gov.