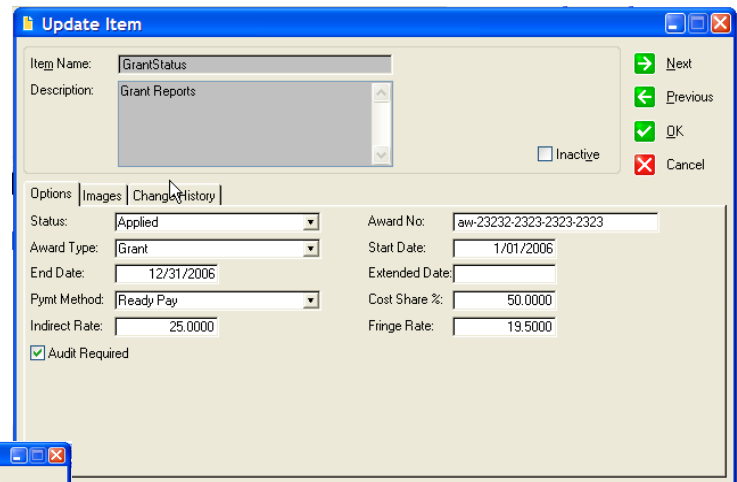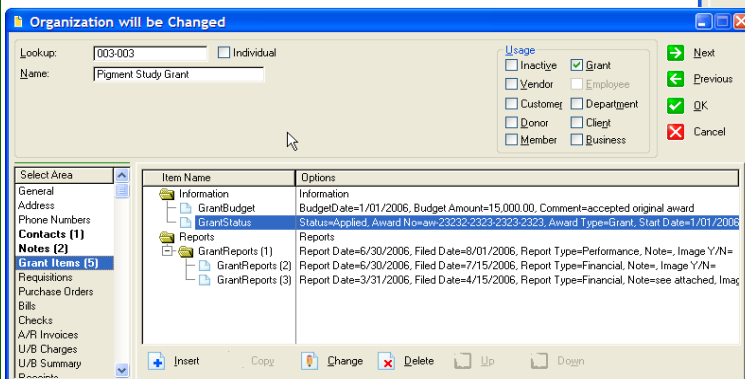# Grants Management

WHAT IT DOES FOR YOU

The *AccuFund* **Grants Management** module gives the user one place to look for all grant information, including financial data, funder reports, demographic data, notes and historical information. **Grants Management** makes tracking your grant information easy and accessible for all users. The module is tightly integrated as part of the *AccuFund Accounting Suite*, with all data readily available so you do not have to go looking in multiple locations to get the full picture of the status of a grant. The financial view can be defined for each grant so each user sees the data summarized to the fields and level

purpose of the grant and scheduled activities. All of theses screens can track a history of changes and can

Each item can be customized to include the specific fields required to manage grants in your organization.

Each grant is treated as an organization entity, giving full access to all screens including contacts, address and notes, as well as the specialized grant screens.

required.

HOW IT WORKS

The *AccuFund* **Grants Management** module builds from the organization table and has all of the features available there, including multiple addresses, telephone numbers, contacts and notes. Added to that functionality is a special tab of grant related information such as grant numbers, application status,

have multiple entries such as a record of each grant report submission.

OTHER FEATURES

The *AccuFund* **Grants Management** module has numerous other features of importance to grants administrators in an organization including:

- ✓ The screens on the Grant tab can be customized by each client.
- ✓ Additional demographic screens can be added including multi-entry historical screens.
- ✓ The financials screens can include multiple columns of data including actual, fiscal budget, grant budget, encumbrance, and requested with a choice of the fiscal period (month-to-date, year-to-date-grant-to-date) reported for each.

- Each grant can have its own definition of the level of revenue and expense detail reported which summarize any level of accounts from the General Ledger, utilizing the AccuFund classification functionality. This screen is printable as a "quick report".
- The financial view is "Drillable" to the account level allowing viewing of the activity associated with each reported cell again with "Quick Report" functionality.
- Images and scanned documents can be attached to **Grants Management** at the Grant level and can be attached to any of the grant tab records as defined by

The Financial Summary allows an up-to-date view of the grant status, summarized into rows defined in your grant budget. Each row can be

the client.

- Adding fields and screens has little or no impact to the performance of financial reporting in the system.

COMPONENT INTEGRATION

The Grants Management module is integrated with:
- **General Ledger** for financial reporting
- **Accounts Receivable** for invoice history
- **Cash Receipts** for cash history
- **Reports and Forms Designer** for user definable reporting.

COMPONENT AVAILABILITY

The **Grants Management** component is available with both the Standard and Professional editions of the *AccuFund Accounting Suite*.

STANDARD TEMPLATES PROVIDED

Predefined grant screens include the following:
- Grant demographic information - all basic information about the grant including funding agency, status, grant number, name, responsible staff person, etc.
- Grant application history - multi-record history of contacts with the funding source and notes.
- Grant reporting status - multi-record history of reporting activity including ability to attach images of reports.
- Grant staffing information - listing of all staff scheduled to work on the grant activities.

Predefined grant reports include a report defined for each grant screen.