

# Quick Reference Guide (QRG)



## New Charter Checklist LEAs/External Users



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## Getting Started

1. New Entity requests are submitted through the [Help Desk Ticketing System](#).
  - a. Use School Finance “Account Analyst Support Request” template
  - b. Select Subcategory “Entity Profile”
  - c. Select Item “Create New Entity”
2. Complete required sections of the Help Desk Ticket
  - a. Traditional School Districts: Attach School Board’s minutes approving the new entity and approval from the State Facilities Board.
  - b. Charter School Districts: Attach approval from the Arizona State Board for Charter Schools

The screenshot shows a web form for creating a support request. The title is "Account Analyst Support Request". At the top right, there is a "Select Template" dropdown set to "Account Analyst Support Request". The form contains several sections:

- Request Type:** Service Request
- Status:** Open
- \* Category:** School Finance Operations
- \* Sub Category:** Entity Profile (highlighted with a red box)
- \* Item:** Create a New Entity
- Group:** SF Operations
- Technician:** -- Select Technician --
- Urgency:** -- Select Urgency --
- Priority:** -- Select Priority --
- \* Subject:** (empty text field)
- Description:** A rich text editor containing the text: "To find your Entity ID please click [here](#)." and "Please find New Calendar Template [here](#)."
- \* Entity/LEA Name:** (empty text field)
- \* Fiscal Year:** (empty text field)
- Enrollment Cap (Charter only):** (empty text field)

3. If you do not have a HelpDesk account or need information on how to submit a HelpDesk request, visit the Help Desk Quick Guide: <https://www.azed.gov/finance/helpdesk-quick-guide>. There is a section titled “What if I don’t have a HelpDesk account?” Follow the instructions and the School Finance Team will submit a HelpDesk ticket on your behalf and you’ll be contacted by ADE IT to complete the Help Desk registration process.

- Register on [www.sam.gov](http://www.sam.gov) for CCR (Central Contractor Registration). Please note that The System for Award Management (SAM) registration is managed by the federal government and there is no cost associated with it.

**SAM**  
SYSTEM FOR AWARD MANAGEMENT

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**A NEW WAY TO SIGN IN** - If you already have a SAM account, use your **SAM email** for login.gov. **Log In**

Login.gov FAQs

HOME | SEARCH RECORDS | DATA ACCESS | CHECK STATUS | ABOUT | HELP

⚠️ ALERT: June 11, 2018: Entities registering in SAM must submit a [notarized letter](#) appointing their authorized Entity Administrator. Read our [updated FAQs](#) to learn more about changes to the notarized letter review process and other system improvements.

⚠️ ALERT: SAM.gov will be down for scheduled maintenance Saturday, 06/15/2019, from 8:00 AM to 1:00 PM (EDT).

⚠️ ALERT: CAGE is currently experiencing a high volume of registrations, and is working them in the order in which they are received. When your registration is assigned to a CAGE Technician, you will be contacted by CAGE, if necessary, for any additional information.

The System for Award Management (SAM) is an official website of the U.S. government. There is no cost to use SAM. You can use this site for FREE to:

- Register to do business with the U.S. government
- Update or renew your entity registration
- Check status of an entity registration
- Search for entity registration and exclusion records

**Getting Started**

**Create A User Account**

Start by creating a SAM user account.

**Register Entity**

After creating your SAM user account, log in to register to do business with the U.S. government.

**Search Records**

Do a public search for existing entity registration records or exclusion records.

Federal users can log in to see additional information.

5. Contact ADE Constituent Services [[questions@azed.gov](mailto:questions@azed.gov); 602-542-3710] to request for ADEConnect Entity Administrator account. This role will allow the designated person the authority to setup user accounts to access many of our online systems such as Grants Management Enterprise (GME).
  - a. After granting access to the Grants Management Enterprise application, AND initial sign-in by the user, the LEA Association role will be granted in GME. (This is the most basic user access role, with limited capabilities)
6. Reach out to Grants Management Technology Team through the [Help Desk Ticketing System](#) to request authority to assign additional roles within the Grants Management Enterprise application.
  - a. Use Grants Management “General Request” template.
  - b. Subject: “Request LEA User Access Administrator Set Up”
  - c. Complete all required sections.
  - d. A follow up to this ticket will include two documents required to be completed and returned to set up this GME User Role
    - i. W-9 Tax Form
    - ii. GME LEA User Access Administrator Access Form
7. Once the Grants Management assigns 1 LEA User Access Administrator, this user is responsible for assigning roles to additional users for that LEA.
8. The LEA User Access Administrator is responsible for assigning additional roles to themselves and others within their organization.
  - a. [List of Critical and Important Roles](#)
  - b. [Add/Delete User Roles](#)

## Checklist

Be sure you have each box checked to ensure you can access and submit your GSA.

- Complete and submit the Entity Profile Form to School Finance via ADE Help Desk
- Register for *CCR* (Central Contractor Registration) at [www.sam.gov](http://www.sam.gov).
- Once School Finance has given ADEConnect access, determine who will be the Entity Administrator. Once an Entity Administrator is identified and assigned by ADE Constituent Services, he or she will need to give access to Grants Management to any users that will need access to GME.
- Reach out to Grants Management via ADE Help Desk to obtain the GME LEA User Access Administrator Access Form.
- Complete and submit the GME LEA User Access Administrator Access Form and W9 forms to Grants Management via ADE Help Desk
- Once Grants Management assigns 1 user as LEA User Access Administrator, this user will assign additional roles to themselves and other staff.

## Need Assistance?

<b>Grants Management System (GME)</b>	<b>Help Desk Support Ticket</b>
Phone: 602.542.3901	
Opt 1-Technology, Opt 2-Processing, Opt 3-Monitoring	<a href="https://helpdeskexternal.azed.gov">https://helpdeskexternal.azed.gov</a>