

IOWA ECONOMIC DEVELOPMENT AUTHORITY
DOWNTOWN HOUSING GRANT

Compliance Readiness Webinar



June 1, 2023



Agenda

- Grant Recap
- Grant Agreement Terms / Reimbursement Requirements
- 2 CFR Part 200 Overview / Requirements
- Procurement Documentation Requirements
 - Proof of Purchase to Vendor
 - Proof of Purchase from Vendor
 - Proof of Payment
- Internal Time Reporting Documentation Requirements
 - Timesheet
 - Proof of Pay Rate
 - Payroll Register
- IowaGrants Correspondence Training
- Questions & Answers

Downtown Housing Grant Recap

- The Downtown Housing Grant Program provides financial assistance for projects that support local downtown revitalization through the creation of new housing opportunities in communities with populations of 30,000 or less.
- The period of performance for the Downtown Housing Grant is the MOU execution date to September 30, 2026.
- Note that all funds need to be obligated by December 31, 2024 but can be expended until December 31, 2026.

Grant Agreement Terms

- The Downtown Housing Grant is paid out to Subrecipients on a reimbursement basis.
- Subrecipients must demonstrate a minimum 25% match contribution prior to receiving any grant funds. The 25% minimum match can be in the form of developer loan, developer cash contribution, or deferred developer fee.
- The first draw request can be submitted once 60% of the sub-grant amount is expended and the required 25% minimum match has been met.
- Final draw request can be submitted for 40% of sub-grant amount upon substantial completion as determined by IEDA and the remaining match indicated in Exhibit A.
- Reimbursement requests are to be submitted through IowaGrants.
- Final reimbursement to be requested and finalized by September 30, 2025.

Downtown Housing Reimbursement Requirements

When submitting for reimbursement, the following are needed:

- Draw Request Reimbursement Form
- Draw Request Itemization
- Documentation of developer loan, developer cash contribution, or deferred developer fee that totals 25% of the award amount developer fee
- Cancelled checks, invoices, receipts, staff time or payrolls
- Data completion or similar reports generated from the approved HMIS or DVIMS system
- Development Agreement between Grantee and Project Developer

Private Match: In-Kind Donations

If a portion of your 25% private match includes an in-kind donation, consider the following:

In-Kind donations must meet the following criteria as outlined in [§200.306](#):

- (1) Are verifiable from the non-Federal entity's records;
- (2) Are not included as contributions for any other Federal award;
- (3) Are necessary and reasonable for accomplishment of project or program objectives;
- (4) Are allowable under [subpart E of this part](#);
- (5) Are not paid by the Federal Government under another Federal award, except where the Federal statute authorizing a program specifically provides that Federal funds made available for such program can be applied to matching or cost sharing requirements of other Federal programs;
- (6) Are provided for in the approved budget when required by the Federal awarding agency; and
- (7) Conform to other provisions of this part, as applicable.

Private Match: In-Kind Donations *Continued*

§200.306 – subpart E:

Volunteer services furnished by third-party professional and technical personnel, consultants, and other skilled and unskilled labor may be counted as cost sharing or matching if the service is an integral and necessary part of an approved project or program. Rates for third-party volunteer services must be consistent with those paid for similar work by the non-Federal entity. In those instances, in which the required skills are not found in the non-Federal entity, rates must be consistent with those paid for similar work in the labor market in which the non-Federal entity competes for the kind of services involved. In either case, paid fringe benefits that are reasonable, necessary, allocable, and otherwise allowable may be included in the valuation.

Downtown Housing Grant's Funding Source

- Funding for the Downtown Housing Grant was provided to the State of Iowa from the American Rescue Plan Act ("ARPA") of 2021.
- As a Subrecipient of a Federal award, it is imperative that all Downtown Housing projects are facilitated in accordance with 2 CFR Part 200 and its applicable appendices.
- It is the responsibility of each Subrecipient to be aware and remain in compliance with all applicable federal regulations throughout the grant period.
- Note that failure to comply with federal regulations can result in your request for reimbursement to be denied in partial or entirety.

What is 2 CFR Part 200?

- 2 CFR Part 200 details the uniform administrative requirements, cost principles, and audit requirements for Federal awards to IEDA and/or the Subrecipients of Federal awards.
- Cost principles determine the allowable costs incurred by IEDA and/or the Subrecipients of a Federal Award.
- Audit requirements set the standards for consistency and uniformity among the Federal agencies for the audit of IEDA that expend the Federal awards.
- **Key Detail:** The procurement of goods and services should be competitive and weed out fraud, waste, and abuse.
- You can view 2 CFR 200 through this [link](#)

Unique Entity Identifier & System for Award Management (SAM)

- Each Subrecipient of a Federal award is responsible for registering with SAM.gov and obtaining a unique entity identifier (UEI). ([2 CFR Appendix-I-to-Part-200 D.3.](#))
- Note that once an UEI is assigned, additional steps will be required to activate the entity registration.
- Each registration will remain active for one calendar year. It is the responsibility of each Subrecipient to ensure that annual renewal procedures are completed in a timely manner.
- Subrecipient registrations must maintain an active status throughout the duration of the grant period.

Procurement Policies

- All Subrecipients of a Federal award are required to have a written procurement policy. ([2 CFR 200.318\(a\)](#))
- Each procurement policy will be required to be submitted to IEDA / RSM.
- Ideally, procurement policies should contain purchasing thresholds that each require its own rules for purchasing goods or services. These thresholds will be evaluated to the 2 CFR Part 200 thresholds and the more stringent thresholds will be evaluated when testing.
- Note that during review, procurement thresholds are evaluated at the aggregate vendor level. That means full contract, invoice, and receipt totals will be assessed for the threshold, regardless of whether the items are specific to the awarded project.
- Please ensure that all procurements are well documented. All applicable procurement documentation must be submitted to the review team with your request for reimbursement.

Procurement

- Each Subrecipient will provide procurement documentation for all material and service costs during the reimbursement process through IowaGrants.
- Procurement documentation must demonstrate **how you determined to source the materials or services**, such as quotes, RFBs, bid tabulations, change orders, etc in concurrence with 2 CFR Part 200.
- Most often, material and service cost expense support will include a form of **original proof of purchase to vendor** (ex: purchase order or contract), **proof of purchase from vendor** (ex: receipt, pay application, or invoice), and **proof of payment** (ex: cancelled check, redacted bank statement) within the period of performance.

Common Procurement Methods & Thresholds

- Micro-Purchase Threshold (< \$10,000)
 - Purchases under this threshold typically do not require formal procurement methods ([2 CFR 200.320\(a\)\(1\)](#))
- Small Purchase Threshold (\$10,000.01 < \$250,000)
 - Purchases within this threshold typically require quotes prior to purchasing ([2 CFR 200.320\(a\)\(2\)](#))
- Simple Acquisition Threshold (\geq \$250,000)
 - Purchases made above this threshold require competitive procurement procedures (formal bids, etc.) ([2 CFR 200.320\(b\)](#))
- Noncompetitive Procurement ([2 CFR 200.320\(c\)](#))
 - Aggregate dollar amount does not exceed the micro-purchase threshold
 - Item is only available from a single source
 - Public exigency or emergency will not permit any delay
 - The Federal Awarding agency or pass-through entity expressly authorizes a noncompetitive procurement in response to a written request
 - ***Note that IEDA will not be authorizing any requests for a noncompetitive procurement***
 - Competition is determined to be inadequate after solicitation of a number of sources

Procurement: Proof of Purchase

At a minimum, the **proof of purchase to the vendor** (ex: contract / purchase order) must include:

- Name of the vendor
- Organization / Subrecipient name (as stated in Grant Agreement)
 - Subrecipients should disclose any aliases used in the support provided to help prevent additional processing time.
- Date that falls within the period of performance
- Description of the goods or services to be purchased
- Rate / cost of the goods or services to be purchased
- If procuring services, a contract must be provided between the Subrecipient and the vendor to demonstrate that the services are in-scope and all rates are pre-set

Note that not all expenses may not require a contract and/or purchase order.

Contracts: Appendix II of 2 CFR Part 200

- Appendix II of 2 CFR Part 200 contains required provisions that should be included in all contracts made under Federal awards.
- Please ensure all vendor contracts include the applicable provisions.
- For all future contracts, statements, and certifications of compliance or the Appendix II required verbiage (if applicable) will be accepted.
- For all contracts previously executed, please contact the vendor to add an addendum that covers any required provisions that were not included in the original contract draft.
- The link to Appendix II of 2 CFR Part 200 can be found [here](#).

Procurement: Purchase Order Example

Purchase Order

July 17th, 2022

Purchase date falls within the period of performance

Organization name

Des Moines Internet Pros
123 Sesame Street
Des Moines, Iowa 50300
515-987-6543
Contact@DSMInternetPros.com

Vendor name

Supplier:
Fiber & More
778 Northwest 98th Avenue
Kansas City, Missouri 64105
123-456-7890
Purchasing@FiberandMore.com

Description of the goods and services purchased

DESCRIPTION	PRICE	QUANTITY	AMOUNT
Fiber Cover	\$20	140	\$2,800
Splitter	\$50	340	\$17,000
10' Optic Cable Roll	\$25	200	\$5,000
		Subtotal	\$24,800
		Estimated Sales Tax	\$1,488
		Estimated Shipping & Handling	\$100
		Order Total	\$26,388

Rate / cost of goods

Procurement: Proof of Purchase

- At a minimum, the **proof of purchase from the vendor** (ex: invoice, receipt, pay application) must include:
 - Name of the vendor
 - Organization / Subrecipient name (as stated in Grant Agreement)
 - Applicants should disclose any aliases (or parent/subsidiary relationships) used in the support provided to help prevent additional processing time.
 - Date that falls within the period of performance
 - Description of the goods or services purchased
 - Rate / cost of the goods or services purchased

Procurement: Invoice Example

Vendor name

Fiber & More

778 Northwest 98th Avenue
Kansas City, MO 64105

Organization name

Date

8.1.2022

To

Des Moines Internet Pros
123 Sesame Street
Des Moines, IA 50309

Ship To

Same as recipient

Purchase date falls within the period of performance

Invoice 63-324

Instructions

Quantity	Description	Unit Price	Total
140	Fiber Cover	\$20	\$2,800.00
340	Splitter	\$50	\$17,000.00
200	10' Optic Cable Roll	\$25	\$5,000.00
Subtotal			\$24,800.00
Sales Tax			\$1,488.00
Shipping & Handling			\$100.00
Total Due By 8.31.2012			\$26,388.00

Description of the goods and services purchased

Rate / cost of goods

Thank you for your business!

Procurement: Proof of Payment

- At a minimum, the **proof of payment** (ex: cleared check, redacted bank statement) must include:
 - Name of the vendor
 - Organization / Subrecipient name (as stated in the Grant Agreement)
 - Applicants should disclose any aliases used in the support provided to help prevent additional processing time.
 - Payment date
 - Amount
 - Note that if the payment includes multiple invoices, a batch detail will need to be provided that can demonstrate that the affiliated invoice was included with the payment.
 - Proof that the payment has cleared the bank
- A screenshot from the financial or accounting system is **not** considered adequate proof of payment.

Procurement: Proof of Payment Examples

Bank Statement Example

SUNTRUST Account Statement

[Awardee Name] Questions? Please call 1-800-786-8787

Financial confidence gives you all kinds of confidence. Join the movement at onlp.com. Confidence Starts Here.

Account Summary	Account Type	Account Number	Statement Period
			03/01/2018 - 03/31/2018

Description	Amount	Description	Amount
Beginning Balance	\$ 0.00	Average Balance	\$ 0.00
Deposits/Credits	\$2,150,574.20	Average Collected Balance	\$ 0.00
Checks	\$ 0.00	Number of Days in Statement Period	31
Withdrawals/Debits	\$2,150,574.20	Annual Percentage Yield Earned	.00%
Ending Balance	\$ 0.00	Interest Paid Year to Date	\$ 0.00

Overdraft Protection	Account Number	Protected By

Deposits/ Credits	Date	Amount	Serial #	Description
	03/01	56,541.54		
	03/02	9,500.44		
	03/05	634.15		
	03/06	167,351.57		
	03/07	2,314.38		
	03/08	3,430.19		
	03/09	100.00		
	03/12	3,070.44		
	03/13	352,587.14		
	03/14	15,534.41		
	03/15	54,157.86		
	03/16	17,825.14		
	03/19	6,353.94		
	03/20	818,577.11		
	03/21	14,651.21		
	03/22	2,947.57		
	03/23	8,482.57		
	03/26	1,526.46		
	03/27	26,752.12		
	03/28	1,585.94		
	03/29	57,417.32		
	03/30	528,314.28		

Withdrawals/ Debits	Date	Amount	Serial #	Description
	03/01	56,541.54		LIST POST SUMMARY DEBIT
	03/02	9,500.44		LIST POST SUMMARY DEBIT
	03/05	634.15		LIST POST SUMMARY DEBIT
	03/06	167,351.57		LIST POST SUMMARY DEBIT
	03/07	2,314.38		LIST POST SUMMARY DEBIT
	03/08	3,430.19		LIST POST SUMMARY DEBIT
	03/09	100.00		LIST POST SUMMARY DEBIT

Organization name

Vendor name

Cleared Check Example

Front of Check **Date**

Des Moines Internet Pros 8-28-2022 1607
 123 Sesame Street
 Des Moines, Iowa 50309 DATE

PAY TO THE ORDER OF Fiber & More \$ 26,388

Twenty six thousand three hundred eighty eight dollars and no/100 DOLLARS

First Savings Bank
 FOR Equipment Clark Kent SIGNATURE

Back of Check

SAMPLE IMAGE

8866520300

UNITED COMMERCIAL BANK
 1-800-999-1234 02/12/05
 >1110012345 6543 00
 7500100900

UNITED COMMERCIAL BANK
 117742321011
 02/12/05 06:50PM 123 4 321 888

Cleared bank

System screenshots are **not** considered adequate proof of payment

Innoprise Software Financials System

Home Chart of Accounts Std Rpt: Authorized Spending Std Rpt: Budget Revenue Budgets Std Rpt: Trial Balance Std Rpt: GLTX Detail Projects/Grants Std Rpt: Working Budget Checks |

245939 contains Filter Clear

showing 1 - 7 of 7

Return Refresh

Checks	Name	Vendor	Vendor	Vendor	Vendor	Vendor	Vendor	Check	Check	Check	Invoice	Invoice	Invoice	Invoice	Line	Item Desc	Quantity	Unit Price	Line	Commodity	Effective	Payment	Account	GL	
Check	First	Address	Address	City	State	Zip	Amount	Date	Status	Base	Date	Total	Total	Total					Total	Code	Date	Type		Allocation	Vendor Invoice
							119,624.22	03/01/2018	Cleared	119,624.22	02/26/2018	306.43	1	1.00	306.4300	306.43	CHANGE ORDR	02/26/2018	Check					306.43	KIS101717-02C 1

Internal Time Reporting

- Each Subrecipient will provide payroll documentation during the reimbursement process through IowaGrants if internal personnel wages are included with reimbursement request.
- Most often, payroll support will include **timesheets, proof of pay rates, and payroll registers**; however, RSM will work with you to provide reasonable documentation to comply with 2 CFR Part 200.
- Federal Award programs are subject to the Freedom of Information Act. As such, it is recommended that Subrecipients **redact any sensitive information** on payroll (and proof of payment) documentation up to the amount that is not needed to prove reasonable documentation.

Internal Time Reporting: Timesheets

- At a minimum, the **timesheet** must include:
 - Employee ID, name, or another common identifier
 - Organization / Subrecipient name (as stated in Grant Agreement)
 - Work dates that are within the period of performance
 - Description of the services and/or work performed
 - Total number of hours worked for the pay period across all applicable employees
- The timesheet may also be known as an activity log and may apply to salary or hourly employees.
- In instances where the claimed employee is salaried and system timesheets are not a standard, ensure that all project hours are tracked and documented.

Timesheet Example

Time Sheet

First Up Consultants

Organization name

Employee name & ID

Employee Name John Smith Employee ID 36
 Manager: Andrew Smith

Start Date 6/15/2022
 End Date 6/19/2022
 Pay Date 6/30/2022

Date	In	Out	In	Out	Regular hrs.	Activity
6/15/2022	8:00	11:00	12:00	18:00	8.00	Patrol Area
6/16/2022	8:00	11:00	12:00	18:00	8.00	Grant - Architectural Review
6/17/2022	8:00	11:00	12:00	18:00	8.00	Patrol Area
6/18/2022	8:00	11:00	12:00	18:00	8.00	Patrol Area
6/19/2022	8:00	11:00	12:00	18:00	8.00	Patrol Area
6/20/2022						
6/21/2022						

Description of the work performed

Date worked is within the period of performance

Total number of hours worked

Regular Hours	40.00
Overtime Hours	
Hourly rate	\$20.00
Total pay	\$800.00

Employee signature

Date

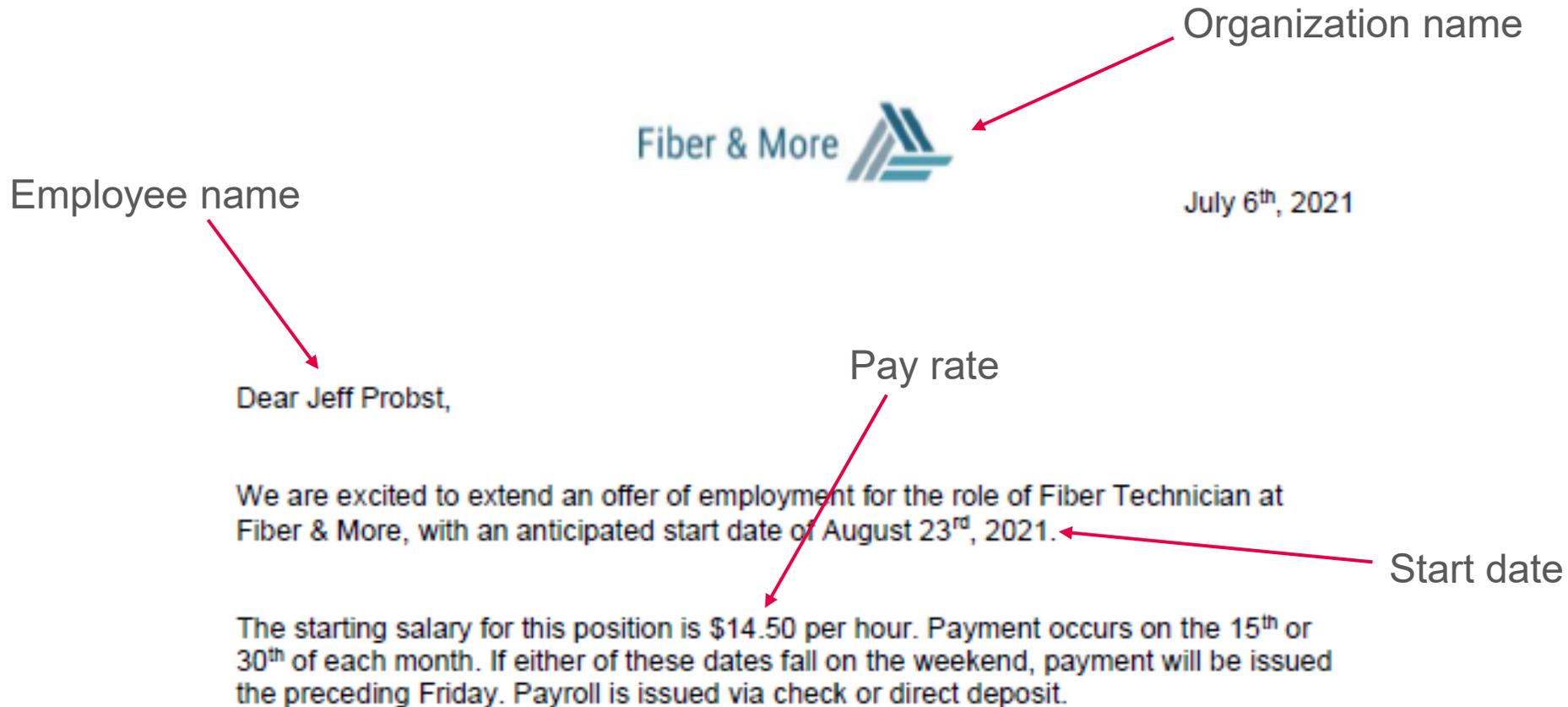
Manager signature

Date

Internal Time Reporting: Proof of Pay Rate

- At a minimum, the **proof of pay rate** must include:
 - Employee's ID, name, or another common identifier
 - Employee's position / title within the organization
 - Organization / Subrecipient name (as stated in Grant Agreement)
 - Employee's pay rate for the pay period claimed
 - Effective pay rate date
- If pay rates are listed on the payroll register provided, then no other additional pay rate documentation is needed.
- Screenshots of payroll systems may be allowable on a case-by-case basis if no documentation of approved pay rates is available.

Proof of Pay Rate Example



Internal Time Reporting: Payroll Register

- At a minimum, the **payroll register** must include:
 - Employee ID, name, or another common identifier
 - Organization name
 - Pay period dates covered in payroll run (range)
 - Pay date that is within the period of performance
 - Amount paid for the period

Payroll Register Example

Pay period range Pay date

Payroll Register Report
Fiber & More

Fiber & More 

Pay Period From 04/01/2023 to 04/14/2023 Pay Date: 04/28/2023 Payroll # 52 (Standard)

Earnings	Hours*	Rate	Current	YTD	Taxes	Current	YTD	Deductions	Current	YTD	ER Taxes**	Current	YTD
Emp# 28 John J. Hancock Sr													
DirDep Net Pay: 568.43													
PhilaForeman				2,773.98	FWT	59.45	2,071.30	Phila JobsRecover	12.80	336.40	ER SS	48.64	1,296.48
PhilaForShift				1,808.32	SS W/H	48.64	1,296.48	Phila MetroRegion	27.46	731.89	ER MC	11.38	303.21
PhilaCarp	8.00	46.70	373.60	10,320.70	MC W/H	11.38	303.21	Phila Per Capita Ta	0.80	21.03	FUTA	0.00	42.00
PhilaCarShift	8.00	51.37	410.96	5,342.48	PA State Tax	24.09	641.97	Phila Political Educ	3.92	104.55	PA SUTA	0.00	395.61
PhilaCarpOT				665.48	Philadelphia City S	27.12	722.85						
					PA SUI	0.47	12.55						
Employee Tot:	16.00		784.56	20,910.96		171.15	5,048.36		44.98	1,193.87		60.02	2,037.30
Grand Tot:	461.00		23,300.33	397,474.53		6,477.19	106,738.86		1,621.23	28,481.21		1,918.99	39,832.91
Payroll Summary Total Net Pay: 15,201.91													
Regular	40.00		2,398.80	35,982.00	FWT	3,117.43	50,798.46	NJ Dues Check-Off	0.00	1,010.01	ER SS	1,444.64	24,643.42
PhilaForeman	79.00		4,058.23	79,315.26	SS W/H	1,444.64	24,643.42	NJ JobRecoveryFu	0.00	504.99	ER MC	337.83	5,763.36
CountyForeman				4,208.64	MC W/H	337.83	5,763.36	NJ Vacation Deduct	0.00	1,262.52	FUTA	0.00	798.00
PhilaForShift	56.00		3,164.56	55,057.92	NJ State Tax	340.26	4,957.57	PA Child/Spousal S	297.38	4,587.45	NJ SUTA	136.52	3,076.85
CountyForShift				385.76	NJ SDI	8.29	186.78	Phila JobsRecovery	368.80	5,861.20	PA SUTA	0.00	5,551.28
PhilaForOT				2,003.56	NJ SUI	20.73	467.09	Phila MetroRegionC	815.52	13,027.81			
CountyForOT				591.84	NJ Family Leave In	3.90	87.93	Phila Per Capita Ta	23.05	366.32	NJ ER SDI	24.38	1,185.34
PhilaForDT				410.96	PA State Tax	478.66	8,550.19	Phila Political Educ	118.48	1,860.91			
PhilaCarp	228.00		10,199.28	125,071.94	Philadelphia City SD	718.14	11,116.97						
CountyCarp				4,323.72	PA SUI	9.31	167.09						
PhilaCarShift	58.00		2,979.46	47,178.32									
CountyCarShif				3,507.20									
PhilaCarpOT				5,253.76									
CountyCarOT				59.78									
PhilaCarpDT				373.60									
NJ Foreman				7,971.60									
NJ Carpent				17,278.67									
Bonus			500.00	7,500.00									
Payroll Totals :	461.00		23,300.33	397,474.53		6,477.19	106,738.86		1,621.23	28,481.21		1,943.37	41,018.25

Organization name

Amount paid for the period

Employee ID / name

* Hour totals represent total work hours and do not include any overtime or double-time premium hours.

** Individual checks include FICA and unemployment taxes only. For summary, other employer tax YTD's represent total employer tax as of pay date.

IowaGrants Correspondence

Subrecipients should use the Correspondence Portal within IowaGrants to communicate with the review team.

IowaGrants is the system of record; since the UST has until 2032 to audit any of these funds, this will allow us to maintain all records until that time.

IowaGrants Correspondence Training

1. Select “Click Here to Access Single Sign on Tool” and sign in.

IOWA GRANTS Welcome to IowaGrants.gov

Login

IowaGrants Users Click Here To Login

[Click Here to Access Single Sign On Tool](#)

Interested in the current posted Opportunities?

[View Current Funding Opportunities](#)

DISABLED (IOWA USERS DO NOT USE)

User ID

Password

[SIGN IN](#)

Announcements

***** NEW SYSTEM LOGIN PROCESS FOR ALL USERS *****

All IowaGrants Users MUST always utilize the Single Sign On Tool to sign into IowaGrants. (It is the first option under "Login" at the top of the page with the blue background.) *You will never use any of the other fields on this page.

Login instructions and a short video are available here, <https://dom.iowa.gov/iowa-grants-login>

Contact your program manager should you have questions.

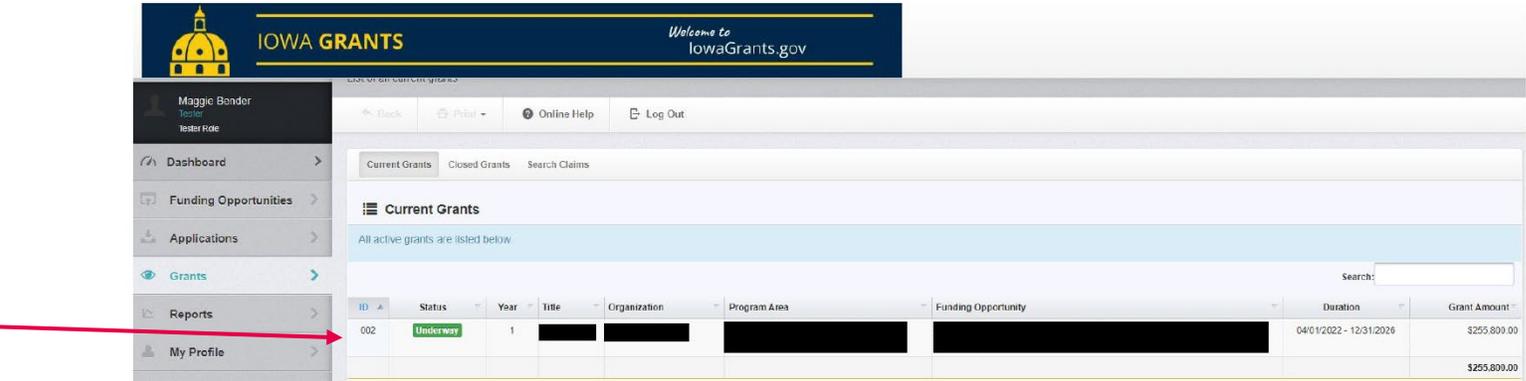
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WebGrants 7.3.1

IowaGrants Correspondence Training *Continued*

2. Select “Grants”



3. Select applicable grant



IowaGrants Correspondence Training *Continued*

4. Select “Correspondence”

The screenshot displays the IowaGrants web application interface. At the top, a dark blue header features the Iowa state capitol dome logo, the text "IOWA GRANTS", and a welcome message "Welcome to iowaGrants.gov". Below the header, a navigation bar includes "Back", "Print", "Online Help", and "Log Out" options. The left sidebar contains a menu with the following items: "Dashboard", "Funding Opportunities", "Applications", "Grants" (highlighted in blue), "Reports", and "My Profile". A red arrow points to the "Correspondence" item in the "Grant Components" table below.

002 - [REDACTED]

Status: **Underway**

Program Area: [REDACTED]

Funding Opportunity: [REDACTED]

Organization: [REDACTED]

Grantee Contact: [REDACTED]

Program Officer: [REDACTED]

Awarded Amount: \$255,800.00

Grant Components

The grant forms appear below.

Component	Last Edited
General Information	Jan 17, 2023 2:12 PM [REDACTED]
Claims	
Status Reports	
Correspondence	Dec 1, 2022 12:00 AM [REDACTED]
Budget NOFA #007	Apr 7, 2022 12:00 AM [REDACTED]
Contract Amendments	
Funding Opportunity	

IowaGrants Correspondence Training *Continued*

5. Select “Add Grantee Correspondence”

The screenshot displays the IowaGrants interface for a specific grant. At the top left, a folder icon is followed by the grant ID '002' and a redacted name. Below this, a yellow background contains the following details:

- Status: **Underway**
- Program Area: [Redacted]
- Funding Opportunity: [Redacted]
- Organization: [Redacted]
- Grantee Contact: [Redacted]
- Program Officer: [Redacted]
- Awarded Amount: \$255,010.00

Below the details is a navigation bar with tabs: Grant List, Genera, Claims, Status, **Corres**, Budget, and Contra. Under the 'Corres' tab, the heading 'Inter-System Grantee Correspondence' is visible. To the right of this heading is a green button labeled '+ Add Grantee Correspondence', which is pointed to by a red arrow. Below the button is a search input field.

Flag	Sent/Received	From	To	Subject	Message	Attachment 1	Attachment 2	Attachment 3	Attachment 4	Attachment 5
	12/01/2022	[Redacted]	[Redacted]	Grant 002 - [Redacted]	Hello testing					

IowaGrants Correspondence Training *Continued*

6. Add “RSM Program Manager” in the “To” field (this is the **ONLY** account you should be sending correspondence to)

7. Add a subject

8. Draft your message

9. Attach files, if needed

10. Send correspondence

The screenshot shows the 'Inter-System Grantee Correspondence' form. It includes a 'Flag' dropdown, a 'To:' field with a red arrow labeled '6', a 'CC:' field, a 'Subject:' field with a red arrow labeled '7', and a 'Message:' text area with a rich text editor toolbar and a red arrow labeled '8'. Below the message area are three 'Attachment' fields (Attachment 1, 2, and 3) with 'Select file' buttons and a red arrow labeled '9'. In the top right corner, there is a 'Send Correspondence' button with a red arrow labeled '10'. A note below the 'To:' field states: 'CC addresses must be entered in a valid email format, i.e. name@domain.org. Use a semicolon (;) to separate multiple CC email addresses.'



QUESTIONS AND ANSWERS

THANK YOU FOR
YOUR TIME AND
ATTENTION

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