

NC PANDEMIC RECOVERY OFFICE
PANGRAM USER GUIDE



NCPRO

NC Pandemic Recovery Office

USER GUIDE

INTRODUCTION

A Brief Introduction to the NCPRO PANGRAM System

WHAT IS PANGRAM?

PANGRAM stands for PANdemic GRants and Awards Management and is a customized version of the SAP Grants Management System developed by the North Carolina Department of Transportation (NCDOT).

NCPRO launched its grant management system in December 2021. The ERA, GEER, HAF and SFRF funds are managed in PANGRAM.

More than a dozen state agencies use a version of NCDOT's SAP system to manage grants, awards and contracts.

HOW IS IT USED?

The PANGRAM system is used by NCPRO Grant Managers and external fund recipients for the following purposes related to grant management:

- Agreement Creation
- Project/Agreement Execution
- Reporting
- Monitoring/Tracking of Project Progress
- Research and Analysis

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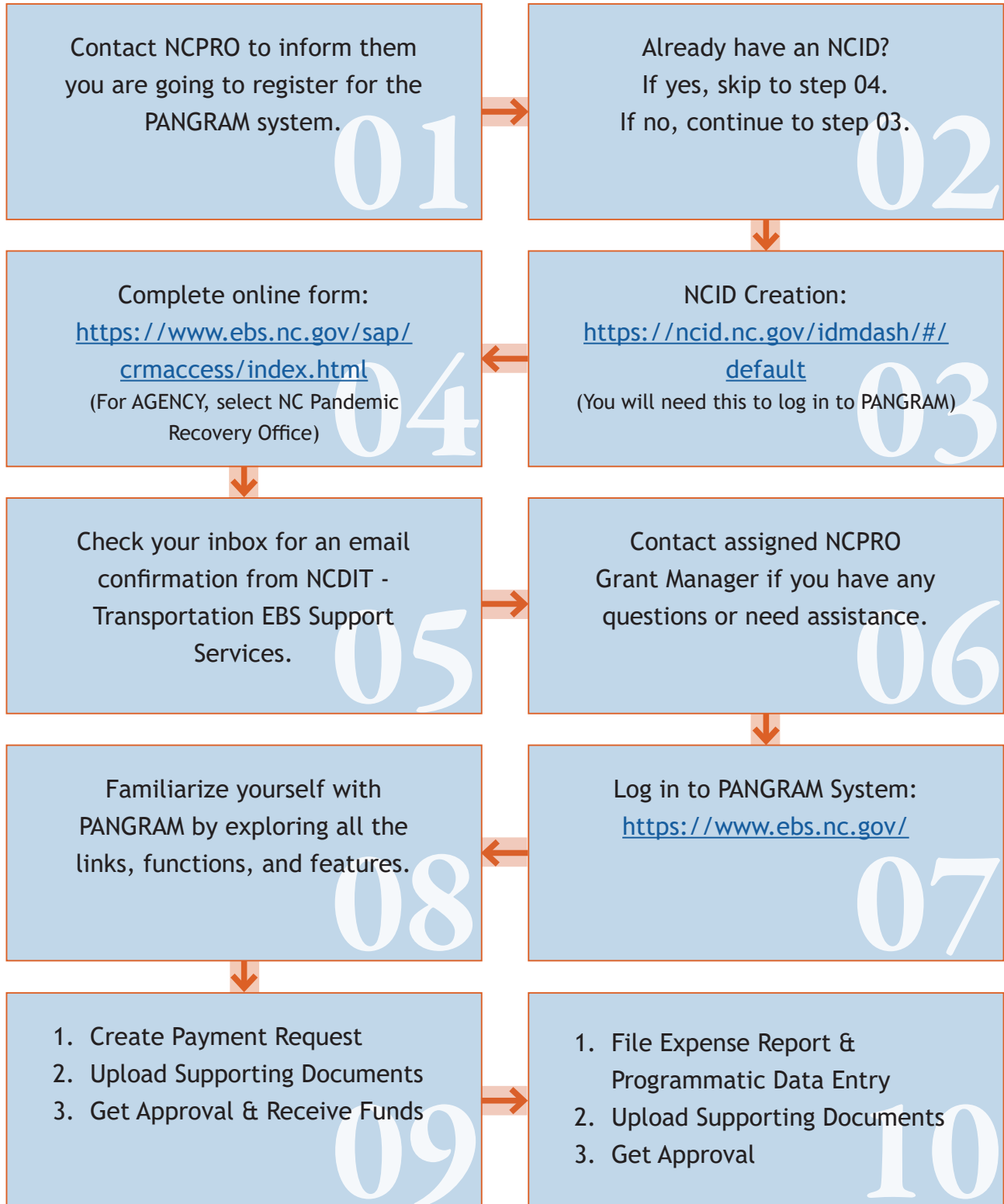
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NCPRO GRANT MANAGER CONTACT INFORMATION

PANGRAM Recipient User Registration

Step-By-Step Instructions for PANGRAM Recipient User Registration and Workflow



LOG IN TO PANGRAM

PANGRAM User Log-In: <https://www.ebs.nc.gov/>

Please log in with your NCID username and password.



The login page features the Great Seal of the State of North Carolina on the left, which includes the text 'THE GREAT SEAL OF THE STATE OF NORTH CAROLINA', 'MAY 20, 1775', 'APRIL 12, 1776', and 'ESSE QUAM VIDERI'. To the right of the seal is the text 'Enterprise Business Services' in a large, bold, dark blue font. Further right are the login fields: 'User *' with a text input box, 'Password *' with a text input box, and a note 'Passwords are case sensitive'. Below the password field is a blue 'Log On' button. At the bottom right, there are two links: 'Login Help *' and 'Browser Support'.

If you CANNOT access the EBS Portal due to an 'authentication error' or if you have forgotten your NCID or Password, please try the following instructions. Do not skip any steps.

1. Close down all internet sessions.
2. Log onto your NCID Account at <https://ncid.nc.gov>
 - If you have forgotten your User ID or Password, click on the appropriate link and follow the prompts.
 - If your account is Locked, click on the appropriate link, and follow the prompts.
 - Otherwise, proceed with step 3.
3. On the Application tab, click on Setup Security Question
 - Verify your security questions are set up. If they are not, they must be established.
4. Close down all internet sessions.
5. Log onto the EBS Portal <https://www.ebs.nc.gov>

If you are still unable to logon on to EBS, repeat the instructions above. However instead of clicking on the Setup Security Question tile (step 3), click on Change My Password and create a new password for the account. Then continue with steps 4 and 5.

Please note NCID is self-service. You can reset your password on the NCID Website: <https://ncid.nc.gov>. You will receive an email to change your password every 90 days. *Failure to change your password on NCID's website will result in your NCID being deleted and loss of access to EBS.* Do not disregard these emails.

If there are any further issues, contact EBS Support (EBSSupport@ncdot.gov) with a phone number where you can be reached.

VIEW AGREEMENTS

Your agency may have multiple agreements (contracts) with NCPRO. Follow the steps below to view your agency's agreements and agreement information.

01

Locate the Search section and click the “View Agreement” link.

The screenshot shows the NCPRO grants website interface. The URL is [https://qcr.ebs.nc.gov/grants\(bD1IbiZjPTYwMCZkPW1pbg=\)/default.htm](https://qcr.ebs.nc.gov/grants(bD1IbiZjPTYwMCZkPW1pbg=)/default.htm). The page title is "Welcome 2SR_NCPRO1". The "Home" section is active, showing a "Recent Items" list on the left and a "Search" section on the right. The "Search" section contains a list of links: "Change Expense Report", "Change Reimbursement Claims", "Review Expense Report", "Review Reimbursement Claims", and "View Agreement". The "Create" section contains links for "New Expense Report" and "New Reimbursement Claim". The "Web Links" section contains a link for "Reference Resources".

02

Use a blank search (click “Search” without entering any criteria) to view all agreements for your agency OR enter an Agreement ID to search for a specific agreement.

The screenshot shows the "Search Criteria" form. The form has four rows of search criteria: "Agreement ID" with a dropdown menu set to "is" and a text box containing "2000057250"; "NCPRO Contract Number" with a dropdown menu set to "contains" and an empty text box; "Program ID" with a dropdown menu set to "contains" and an empty text box; and "Grantee ID" with a dropdown menu set to "is" and an empty text box. Below the search criteria is a "Maximum Number of Results" field set to "100". There is a "Search" button (circled in blue) and a "Clear" button. To the right of the "Search" button is a "Save Search As:" field and an "Include View" checkbox. Below the search criteria is a "Result List: 1 Agreement Found" section. The "View" dropdown menu is set to "On the Queue". The result list is a table with four columns: "Program ID", "Posting Date", "Agreement ID", and "NCPRO Contract Number". The table contains one row of data: "SFRF_REVENUE_REPLACEMENT", "02/21/2022", "2000057250", and "OSBM-PREMIUM-01".

| Program ID | Posting Date | Agreement ID | NCPRO Contract Number |
|--------------------------|--------------|--------------|-----------------------|
| SFRF_REVENUE_REPLACEMENT | 02/21/2022 | 2000057250 | OSBM-PREMIUM-01 |

VIEW AGREEMENTS

Your agency may have multiple agreements (contracts) with NCPRO. Follow the steps below to view your agency's agreements and agreement information.



Select the agreement to view all of the details such as budget amount, project start and end dates, and final contract (MOU).

Agreement: 2000057250, Premium Pay Bonuses - State and Local Back

Save Cancel New Copy Refresh DocuSign - Start Signing Process DocuSign - Signing Status

Agreement Overview Edit

General Data

NCPRO Contract Number: OSBM-PREMIUM-01
Description: Premium Pay Bonuses - State and Local
Grantee ID/Name: 2000016162 / NC Office of State Budget and Management
Grantee Contact: 2000016162 / NC Office of State Budget and Management
Program ID/Desc.: SFRF_REVENUE_REPLACEMENT / SFRF: Revenue R...
Posting Date: 02/21/2022
Last Changed By/On: FF_FUNCTION / 03/09/2022
Employee Responsible: Marquis Crews
Start Date: 03/03/2021
End Date: 12/31/2026
Status: Approved
Session Law: 2021-180
Session Law Section: 39.2

Amounts

Authorized Amount: 545,000,000.00 USD
Billing Req. Amount: 409,772,085.58 USD

Payment Account Information

NCGrants Data

NC Grants ID:
NC Grants Indicator:
NGO Flag: ☐
Service Type:
Tran Type - NCGrants:
NC Grants Contract N:
Funding Source:
ARRA Flag:
Optional Agency Text:

Full Project Name

Premium Pay Bonuses - State and Local Education Employees

Agreement Item List New Edit List

Filter:

| Actions | Item No | Expense Type | Status | Authorized Amount | Authorized Claim A... | Open Balance | Expense Amount |
|-------------------------------|---------|----------------------------|----------|-------------------|-----------------------|--------------------|----------------|
| ✎ 🗑 | 10 | 6.1 Provision of Govern... | Released | 545,000,000.00 | 409,772,085.58 USD | 135,227,914.42 USD | 0.00 USD |

Notes New

Filter:

| Actions | Text Type | Text | Language |
|-------------------------------|---------------------|---|----------|
| ✎ 🗑 | Project Description | Provides a \$1,000 bonus for full-time State employees and local education employees, regardless of funding source. Also provides ... | English |
| ✎ 🗑 | Workflow Log | Submitted (SBMT), by Marquis Crews (MCREWS1), on date: 03/02/2022 , time: 11:23:34 L1 Approved (APR1), by Jon Williams... | English |

Attachments Attachment URL With Template Advanced

Filter:

| Actions | Attachment Type | Description | Name | Created On | Created By |
|--|------------------|-------------|----------|------------------|------------|
| Properties 🗑 | Policy Documents | Budget Bill | 2021-180 | 02/21/2022 15:17 | MCREWS1 |

Upload Document(s) From Local Hard Disk: Choose Files No file chosen Upload

Transaction History

Change History

Workflow Log

PAYMENT REQUESTS

After the MOU is signed, one immediate task for most recipients is to request funding.



Locate the Create section and select “Create Payment Request” link.

The screenshot shows a web application interface with three main sections: 'Search', 'Create', and 'Web Links'. The 'Create' section is highlighted with a yellow background and contains two links: 'Create Payment Request' (underlined) and 'Create Expense Report'. The 'Search' section lists various options like 'Recipient Accounts', 'Programs', 'Agreements', etc. The 'Web Links' section lists 'NCPRO PANGRAM Website/FAQ' and 'NCPRO PANGRAM Training Library'.



Use a blank “Search” OR search by Agreement ID and open the “Payment Request Form” for the agreement/project you are requesting funds from.*

The screenshot shows the 'Search Criteria' section with fields for Agreement ID, Agreement Description, Program ID, and Grantee ID. The 'Search' button is highlighted with a red circle. Below the search criteria, there is a 'Result List (6 rows filtered)' table. The table has three columns: 'Disbursement/Reimbursement Form', 'Agreement ID', and 'Description'. The first two rows are highlighted with a blue background. The first row is 'NCPRO Disbursement Form' with Agreement ID '2000052670' and Description 'NCcareers.org'. The second row is 'NCPRO Payment Request Form' with Agreement ID '2000052670' and Description 'NCcareers.org'. The third row is 'NCPRO Disbursement Form' with Agreement ID '2000057844' and Description 'Travel and Tourism Marketing'. The fourth row is 'NCPRO Payment Request Form' with Agreement ID '2000057844' and Description 'Travel and Tourism Marketing'. The fifth row is 'NCPRO Disbursement Form' with Agreement ID '2000057845' and Description 'High Point Furniture market'. The sixth row is 'NCPRO Payment Request Form' with Agreement ID '2000057845' and Description 'High Point Furniture market'.

| Disbursement/Reimbursement Form | Agreement ID | Description |
|-----------------------------------|--------------|------------------------------|
| NCPRO Disbursement Form | 2000052670 | NCcareers.org |
| NCPRO <u>Payment Request Form</u> | 2000052670 | NCcareers.org |
| NCPRO Disbursement Form | 2000057844 | Travel and Tourism Marketing |
| NCPRO <u>Payment Request Form</u> | 2000057844 | Travel and Tourism Marketing |
| NCPRO Disbursement Form | 2000057845 | High Point Furniture market |
| NCPRO <u>Payment Request Form</u> | 2000057845 | High Point Furniture market |


*Please always select
“NCPRO Payment Request Form”
NOT
“NCPRO Disbursement Form”

PAYMENT REQUESTS

After the MOU is signed, one immediate task for most recipients is to request funding.



Fill out the data entry (highlighted blue).



North Carolina Pandemic Recovery Office

Payment Request Document

| | | | |
|---|--|--|--|
| Grantee Name: NC Dept of Commerce Mail Service Center 4346 | | Grantee ID: 2000007144 | |
| Program: GEER1 - Governor's Emergency Education | | Date Prepared: * 03/22/2022 | |
| Agreement Number: 2000052670 | | Mailing Address: Mail Service Center 4346 301 N. Wilmington Raleigh, NC 27699-4346 | |
| Agreement Name: NCcareers.org | | Agreement Period From: 12/01/2020 To: 09/30/2022 | |
| Payment Request Type: * <input type="radio"/> Reimbursement <input type="radio"/> Disbursement | | Invoice Period From: * To: * | |

| Expense Category | Description | Approved Budget | Approved Reimbursement/Disbursement | Payment This Period | Accumulated Payments to Date | Balance |
|------------------|---|---------------------|-------------------------------------|---------------------|------------------------------|---------------------|
| P077 | 12.1 GEER Employee Expenses | \$130,208.40 | \$909.58 | | \$909.58 | \$129,298.82 |
| P078 | 12.2 GEER Contracted Labor Expenses | \$46,503.00 | \$0.00 | | \$0.00 | \$46,503.00 |
| P079 | 12.3 GEER Other Administrative Expenses | \$10,000.00 | \$0.00 | | \$0.00 | \$10,000.00 |
| P083 | 12.7 Other goods and services purchased | \$9,300.60 | \$0.00 | | \$0.00 | \$9,300.60 |
| Totals | | \$196,012.00 | \$909.58 | \$0.00 | \$909.58 | \$195,102.42 |

Reimbursements for Item type P077

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|--------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

Reimbursements for Item type P078

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|--------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

Reimbursements for Item type P079

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|--------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

Reimbursements for Item type P083

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|--------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

COMMENTS:

- Select “Disbursement” option for Payment Request Type by default.
- Invoice Period “To:” date cannot be later than the payment request date.
- Reference # is for the recipient agency to use for reference; it should be unique by project.
- Reference Date must be between the invoice period.
- Description/Subrecipient Name is a required field; enter a brief description of the fund needs.
- Select one item from the Accounting Categories dropdown list; if you are not sure which one to choose, select General Program Cost.
- Please use the comments section to add more details and explanation for the payment request.
- Click “Submit” and then attach any necessary supporting documents.

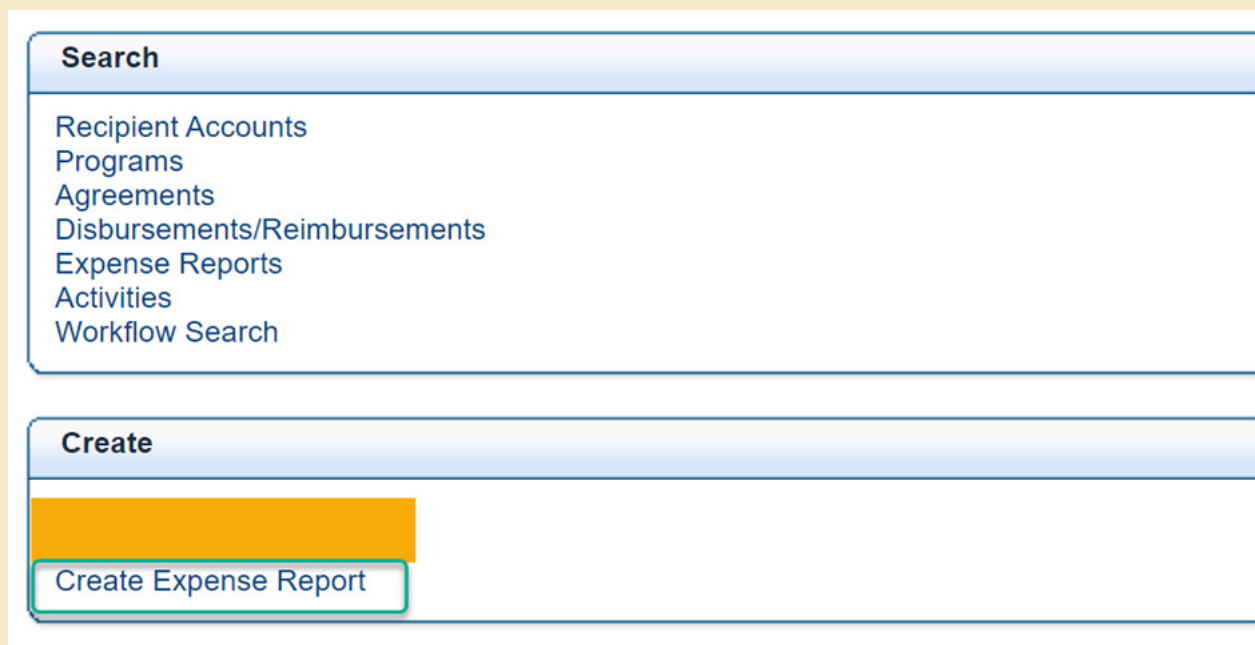
FILE EXPENSE REPORTS

SFRF recipients are required to file monthly expense reports and programmatic data entry after receiving their first disbursement of funds and beginning to have expenses. Recipients should work with their corresponding NCPRO Grant Manager as needed to submit expense reports.

Once previous monthly expenses are available, recipients should file the expense form as soon as possible. Even if there are no expenses for the reporting month, recipients still need to log in to PANGRAM to file the expense report and submit a “0” amount for the previous month’s expenses.


When submitting the monthly expense report, please remember to attach all necessary supporting documentation (invoices, payment proofs, etc.).

Please view the example and step-by-step instructions on the following page. NCPRO will continually work to update and add more details as needed.



The screenshot displays the PANGRAM user interface. It features two main sections: 'Search' and 'Create'. The 'Search' section is at the top, with a light blue header and a list of menu items: Recipient Accounts, Programs, Agreements, Disbursements/Reimbursements, Expense Reports, Activities, and Workflow Search. The 'Create' section is below it, also with a light blue header. It contains a solid orange rectangular button labeled 'Create Expense Report'.

FILE EXPENSE REPORTS



North Carolina Pandemic Recovery Office
Expense Reporting Document

| | |
|--|--|
| Grantee Name: Department of Public Instruction | Grantee ID: 2000011425 |
| Program: GEER1 | Date Prepared: * 03/23/2022 |
| Agreement Name: Student success grants | |
| Agreement Number: 2000052478 | Agreement Period From: 12/01/2020 To: 09/30/2022 |
| Mailing Address: 6319 Mail Service Center Raleigh, NC 27699 | Period From: * To: * |

| Expense Category | Description | Approved Budget | Approved Expenditures | Expenses This Period | Accumulated Expenditures To Date | Balance |
|-----------------------|---|------------------------|-----------------------|----------------------|----------------------------------|------------------------|
| P077 | 12.1 GEER Employee Expenses | \$13,375,636.12 | \$0.00 | | \$0.00 | \$13,375,636.12 |
| P078 | 12.2 GEER Contracted Labor Expenses | \$2,595,272.68 | \$0.00 | | \$0.00 | \$2,595,272.68 |
| P079 | 12.3 GEER Other Administrative Expenses | \$50,000.00 | \$0.00 | | \$0.00 | \$50,000.00 |
| P083 | 12.7 Other goods and services purchased | \$3,992,727.20 | \$0.00 | | \$0.00 | \$3,992,727.20 |
| Total Expenses | | \$20,013,636.00 | \$0.00 | \$0.00 | \$0.00 | \$20,013,636.00 |

Expenses for Item type P077

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Expense Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|----------------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

Expenses for Item type P078

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Expense Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|----------------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

Expenses for Item type P079

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Expense Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|----------------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

Expenses for Item type P083

| Reference # | Reference Date | Description/Subrecipient Name | Accounting Category | Amount | Total Expense Amount | Add Line |
|--------------|----------------|-------------------------------|---------------------|--------|----------------------|----------|
| | MM/DD/YYYY | | Please Select | | | |
| Total | | | | | | |

How many subrecipients did you pay in this expense report period (Subrecipients Count)?

Programmatic Data

| | |
|---|--|
| New subawards greater than \$30k: | |
| Purchasing educational technology (including hardware, software, and connectivity), which may include assistive technology or adaptive equipment: | |
| Mobile hotspots with paid data plans: | |
| Internet connected devices with paid data plans: | |
| Home internet subscription for students: | |
| Home internet access through a district-managed wireless network: | |
| Other (specify): | |
| Activities focused specifically to addressing the unique needs of low-income children or students, children with disabilities, English learners, racial and ethnic minorities, students experiencing homelessness, and foster care youth: | |
| Providing mental health services and supports: | |
| Sanitization and minimizing the spread of infectious diseases, including cleaning supplies and staff training to address sanitization and minimizing the spread of infectious diseases: | |
| Summer learning and supplemental afterschool programs: | |
| Financial aid grants to students: | |
| Support distance learning and remote education: | |
| Address impact of lost instructional time: | |
| Provide direct financial support of students (e.g., scholarships): | |
| Support distance learning and remote education: | |
| Safe School Reopening: | |
| Students and teachers in both Title I and Non-Title I schools: | |
| Only students and teachers in Title I schools: | |

Comments:

☐ Select checkbox to attest:

I attest that my submissions do not include Personally Identifying Information as defined by 2 CFR 200 and NCGS 75-61(10). The following is the federal definition for ease of reference: Protected Personally Identifiable Information (Protected PII) means an individual's first name or first initial and last name in combination with any one or more of types of information, including, but not limited to, social security number, passport number, credit card numbers, clearances, bank numbers, biometrics, date and place of birth, mother's maiden name, criminal, medical and financial records, educational transcripts.

Recipients and subrecipients of federal financial assistance are required under 2 CFR 303(e) to implement internal controls that take reasonable measures to safeguard protected PII. NCPRO's grant management system is not designed for storage of sensitive PII, and if you need to submit such data you should contact NCPRO staff to determine a means of secure transfer.

Check
Save
Submit

- Period: Previous month's date range (Example: Period From: 4/1/2022 To: 4/30/2022)
- Fill out the expenses for each accounting category in corresponding expense types.
- It is a good practice that one line of entry in the expense report will have one corresponding supporting document.
- It is good practice that the name of the supporting document includes the expense line's corresponding Reference #.
- Please use the comments section to add more details and explanations for the expense activities in the previous month.
- When completing the Programmatic Data entry, consult with NCPRO Grant Managers if there are questions or confusion.
- The Save button will save the expense report as "DRAFT".
- The Submit button means your entries are complete and will send your report to NCPRO Grant Managers for review.
- If you find any mistakes after submitting the report, contact your NCPRO Grant Manager quickly to resolve the issue.

SUPPORTING DOCUMENTS

Supporting documents are any documents which can help justify your payment request and prove your actual expenses.

Other required documents (sub-recipient data, programmatic data, performance review data, Audit data) are also part of supporting documents for SFRF grant management system. Expense reports should be done in each month during the lifespan of the project.

Example Documents Required for Monthly Reporting:

- Payment expenses proof
- Invoices or receipts

Example Documents Required for Quarterly Reporting:

- Subrecipient data
- Programmatic Data
- Single Audits (Annually)
- Other required supporting documents

BEST PRACTICES

Please refer to these best practices for using PANGRAM, completing expense reports, meeting with NCPRO Grant Managers and more.

Schedule a recurring time on your calendar at the beginning of each month to work on the completed month's expense report.

Your assigned NCPRO Grant Manager will schedule a 30-minute meeting with your agency each month.

Your assigned NCPRO Grant Manager will schedule a 2-hour meeting each quarter for 2022 quarterly reporting.

Train any new staff as soon as possible if there are any personnel turnover.

Attend bi-weekly interagency meetings to stay up-to-date on information and requirements for SFRF.

Train other users in your agency and help answer their questions.

Have all the corresponding NCPRO contact information on hand to ask questions when needed.

Share your suggestions, comments and feedback with NCPRO.

Email and Microsoft Teams are efficient ways to connect with NCPRO staff.

NCPRO Grant Manager Contact Information

Please reach out to your assigned NCPRO Grant Manager with any questions about your agreement or using the PANGRAM system.

| Agency | Funding Sources | NCPRO Contact | Email | Phone |
|-------------------------------|-----------------|-----------------|-----------------------------|--------------|
| AOC, DPS, NCGA, DOI, DOT, DST | SFRF | Heather Laffler | Heather.Laffler@osbm.nc.gov | 919-816-7983 |
| External Entities | CRF, SFRF | Laura Jimenez | Laura.Jimenez@osbm.nc.gov | 919-441-0973 |
| DHHS, NCHFA, NCORR (ERA Only) | SFRF, ERA, HAF | Tara Fikes | Tara.Fikes@osbm.nc.gov | 984-227-5340 |
| DOR, DOA, DNCR, DACS | SFRF, LFRF | Nate Halubka | Nate.Halubka@osbm.nc.gov | 919-437-6006 |
| UNC, NCCCS, DPI | SFRF, GEER | Adam Shull | Adam.Shull@osbm.nc.gov | 919-737-3517 |
| Commerce, DIT, DEQ, OSBM | SFRF, CPF, EDAT | Marquis Crews | Marquis.Crews@osbm.nc.gov | 984-960-7056 |

Glossary of Acronyms

CPF - Capital Projects Fund (ARPA)

CRF - Coronavirus Relief Funds (CARES)

ERA - Emergency Rental Assistance (CRRSA and ARPA)

EDAT - Economic Development Administration Tourism (ARPA)

GEER - Governor's Emergency Education Relief (CARES and CRRSA)

HAF - Homeowners' Assistance Funds (ARPA)

LFRF - Local Fiscal Recovery Funds (ARPA)

SFRF - State Fiscal Recovery Funds (ARPA)