



SHOARS
STI/HIV Operations and Resource System

Funded Agency Training

August 3, 2022

Welcome

Meet your instructors



Caitlin Hotchkiss

DHSP,
SHOARS Project Lead



Krista Cox

DHSP,
SHOARS Project Coordinator

CONTACT US:

MDHHS-SHOARS-SUPPORT@michigan.gov

Have a question for the Division of HIV and STI
Programs (DHSP)? Or need assistance with SHOARS?
Click here!

 **Contact DHSP**



SHOARS

STI/HIV Operations and Resource System

Is

DYNAMIC

1 | Welcome

2 | SHOARS Overview

3 | Grants Management

4 | Closing



How to Ask Questions

All lines are muted.

We will save time
for Q&A at the end of
the presentation.



SHOARS OVERVIEW

What is SHOARS?

SHOARS is a Salesforce business solution

Salesforce is a customer relationship management program that allows providers to better serve their clients

It is like shopping online – you tell the system what you want, and you will get it

STI/HIV Operations and Resource System (SHOARS) is a Salesforce solution designed specifically for the Division of HIV and STI Programs (DHSP)



What SHOARS Is/Isn't



IS



SHOARS is the place in which you now provide updates to DHSP on all your **contract and grant spending**



SHOARS is the place where you **respond to event invitations**, make requests for **additional events**, and **request event support**



Our division is able **to track your material and supplies requests**, so we now can better support you in serving your communities



DHSP is now able to **communicate more efficiently** with targeted distribution lists to push updates, events, and surveys

IS NOT



SHOARS isn't a system that houses **PII** or **PHI**

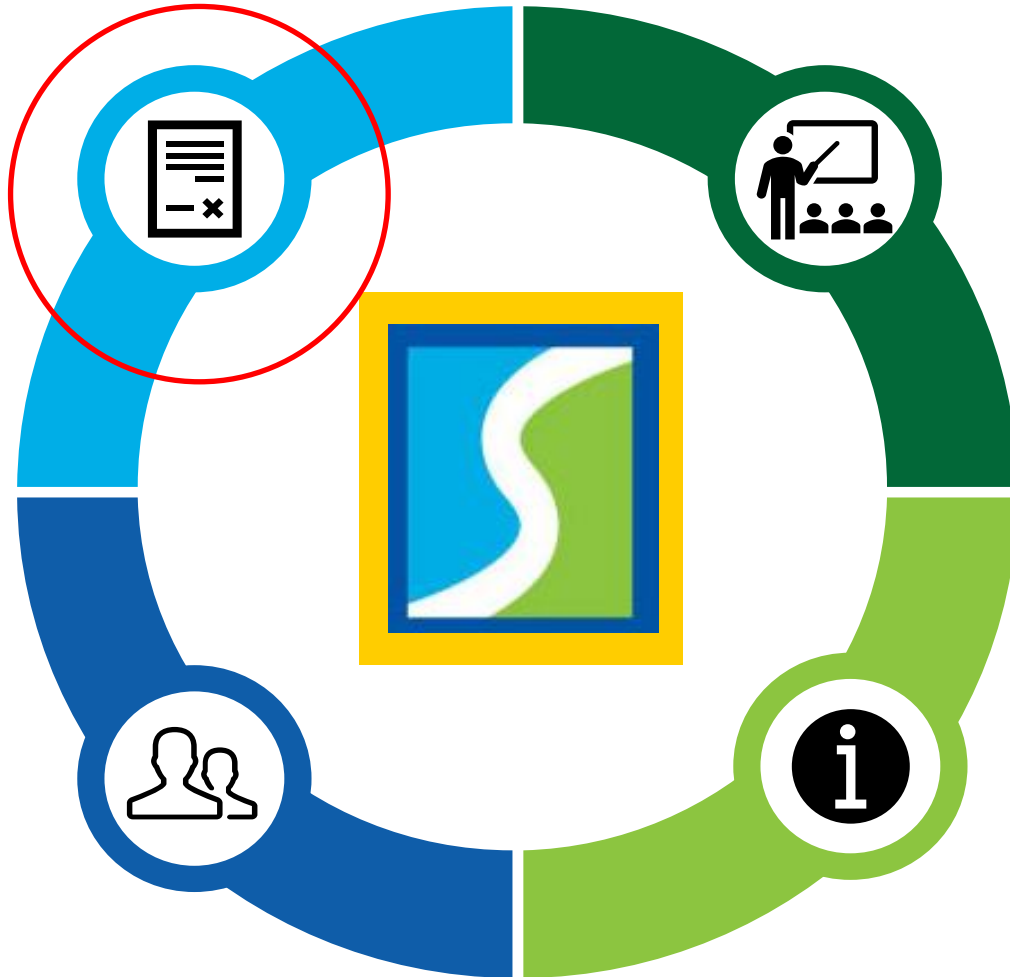


SHOARS isn't a **replacement** for working with DHSP or a **replacement** for EGrAMS

SHOARS improves the **relationship** between DHSP and our DHSP Partners to **efficiently** provide **services** for Michiganders who are at risk and/or living with HIV & STIs

How is SHOARS broken up

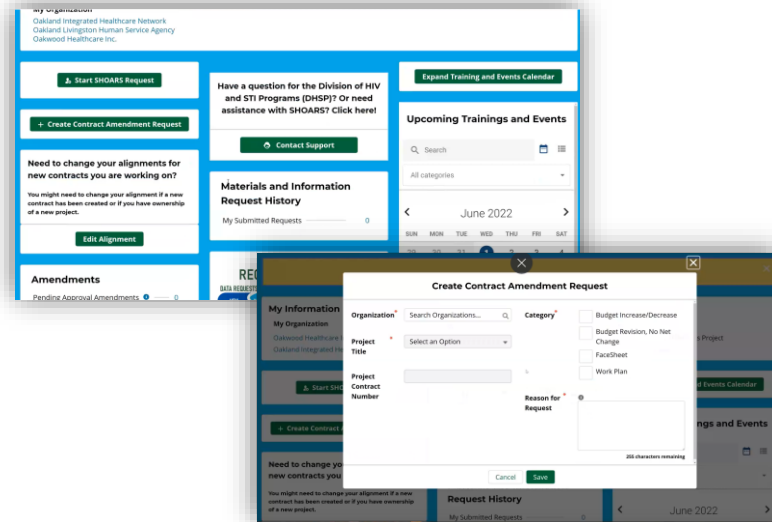
SHOARS has five main action areas that allows our Division and our DHSP Partners to get the work done!



- ☐ **PROFILE MANAGEMENT**
- ☐ **COMMUNICATIONS + SURVEYS**
- ☐ **TRAINING, EVENTS, + CONFERENCES**
- ☐ **MATERIALS, SUPPLIES, + DATA REQUESTS**
- ☒ **GRANTS + CONTRACTS**

Grants Management in SHOARS

The goal - improved and coordinated communication with DHSP



□ GRANTS + CONTRACTS

- Manage your grants with DHSP
- Apply for contract amendments and experience a more streamlined process
- Communicate with DHSP regarding grant amendment requests

SHOARS Grants Management Roles



Organization Lead/Authorized Representative (OL/AR)

- Has full access and privileges to all agency grants and amendment requests
- Must match what is listed in EGrAMS
- 1/Agency
- **Required**



Program Manager (PM)

- Has full access and privileges to any agency grants for which they have primary day-to-day responsibility
- Must match what is listed in EGrAMS
- 1/Project
- **Required**



Program Team Member (PTM)

- Has restricted privileges to only those projects they are directly aligned with
- Can have as many PTMs as needed
- Additional privileges can be granted by agency's OL/AR or PM
- Does not need to be aligned with EGrAMS
- **Optional**

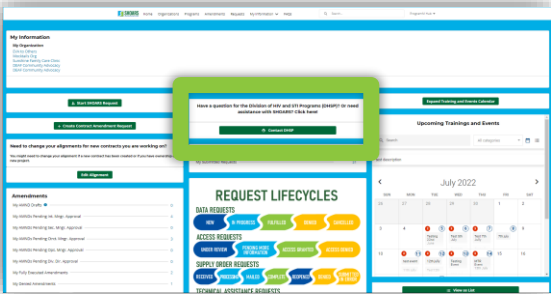
Two-Way Communication

Reach out to SHOARS Support/DHSP from the homepage



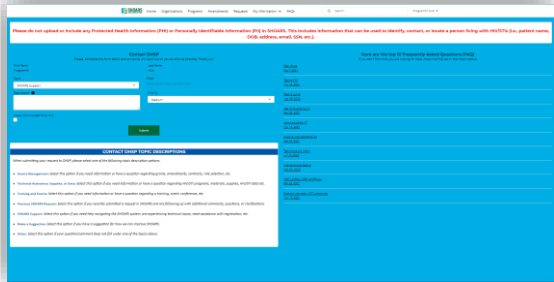
Select the Contact DHSP button

You can contact SHOARS Support through the “Contact DHSP” button found on the SHOARS homepage



Complete the Contact SHOARS Support Form

Reaching out through the Customer Support Contact Us page gives some structure to your request (can also email us at MDHHS-SHOARS-Support@michigan.gov).



Wait for a response from DHSP

Once you submit the form, you will receive a confirmation email. DHSP will respond to the request as soon as possible



SHOARS Resources

Additional resources are available to help you better understand how to use SHOARS

1 Micro Learning Videos



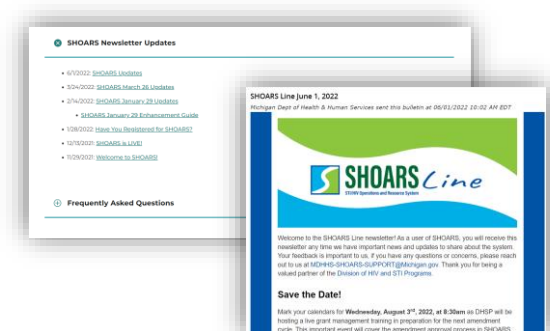
View a variety of micro learning videos that **provide a step-by-step guide** in completing certain processes

2 Training Materials



We have uploaded the training materials with current processes to **best support you**

3 SHOARS *Line* Newsletters



Visit the SHOARS *Line* newsletters to **view system updates**

Visit:

Michigan.gov/SHOARS



SHOARS

STI/HIV Operations and Resource System

Some important reminders when navigating SHOARS:

- **EGrAMS and SHOARS work together.** EGrAMS is not going away, both systems are necessary to approve grants and contracts and work together to share information
- **DHSP is here to help!** When you submit a request there might be more than one person at DHSP working to resolve your asks. Expect to hear from different people!



SHOARS

STI/HIV Operations and Resource System

One more important reminder regarding SHOARS:

Have your colleagues join SHOARS!



SHOARS

STI/HIV Operations and Resource System

SHOARS BEGINS WITH REGISTRATION

There are FOUR steps required to get access to SHOARS

- 1. Create an account with MILogin***
- 2. Request access to SHOARS in MILogin**
- 3. Complete the User Registration form in SHOARS**
- 4. Click and submit the "+ Finish Your SHOARS Profile Here" form in SHOARS**

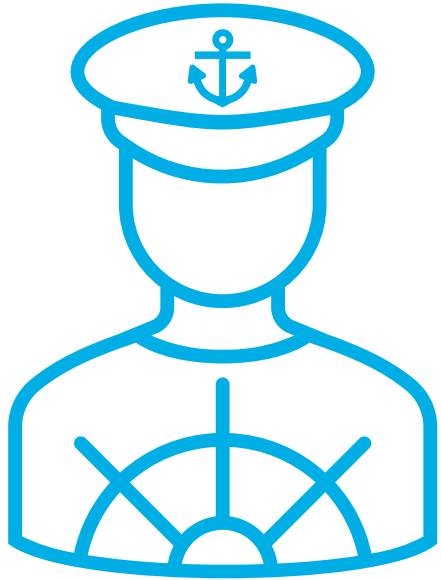
**If you already have a MILogin account, you do not need to create a new one. You will be able to skip to step #2.*

START HERE: [MILogin for Third Party Link](#)

REGISTRATION GUIDE: [Instructions to setup your SHOARS account](#)



GRANTS MANAGEMENT UPDATES



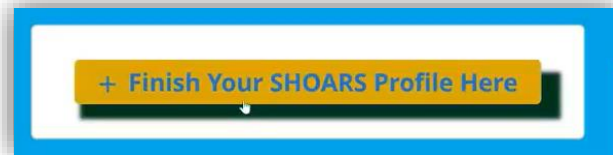
SHOARS

STI/HIV Operations and Resource System

**EXPERIENCE WHEN
VIEWING GRANTS
MANAGEMENT ROLES
& ALIGNMENTS**

Experience when viewing grants management roles & alignments

Navigate to the SHOARS homepage as a DHSP Partner who is logging into SHOARS for the first time



*Are you an Amendment Approver or a Subrecipient user?

☒ MDHHS Amendment Approver – Select this option if you are an MDHHS employee outside of DHSP using SHOARS to manage contract amendments

☐ Partner Agency User – Select this option if your agency receives funding from or contracts with DHSP

Select Organizations and Projects

*Your Organization

*Your Project Title(s)

[+ Add Alignment](#)

*Select your role

☐ Organization Lead/Authorized Representative –Individual with authority to sign agreements, enter into contracts and submit amendments.
Note:This role must match what your organization and project has listed in EGrAMS.

☐ Program Manager –Individual with primary, day-to-day responsibility for overseeing DHSP funded programs.
Note:This role must match what your organization and project has listed in EGrAMS.

☐ Program Team Member –Other individuals who work with DHSP funded programs, but do not serve as the lead staff.
Note:There is no limit on the number of Program Team Members. The permissions for this role can vary, and are approved by the associated Program Manager within the organization. This role does not need to match your organization's EGrAMS record.

*What functionality do you need as a program team member?

☒ View Amendment Information

☒ Submit Amendments

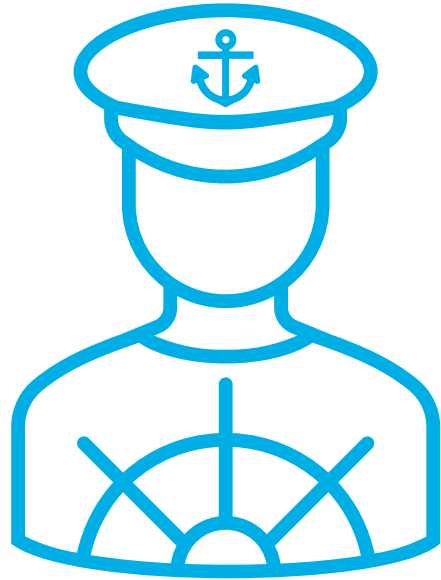
☒ View Project Information

** 'View Amendment Information' will automatically get reflected in your profile if you select 'Submit Amendment'



Your Request has been submitted and is now pending approval. You'll receive an email notification when your request has been updated.

- Select **Partner Agency User**
- Determine the **role you have** as a Partner Agency User
- You will select your **Organization** and your **Project** which is also known as an **alignment**



SHOARS

STI/HIV Operations and Resource System

HOW TO CHANGE ROLES & ALIGNMENTS

How to change roles and/or alignments to account for new amendment cycles

Need to change your alignments for new contracts you are working on?

You might need to change your alignment if a new contract has been created or if you have ownership of a new project.

Edit Alignment

***Select your role**

☐ **Organization Lead/Authorized Representative** –Individual with authority to sign agreements, enter into contracts and submit amendments.
Note:This role must match what your organization and project has listed in EGrAMS.

☒ **Program Manager** –Individual with primary, day-to-day responsibility for overseeing DHSP funded programs.
Note:This role must match what your organization and project has listed in EGrAMS.

☐ **Program Team Member** –Other individuals who work with DHSP funded programs, but do not serve as the lead staff.
Note:There is no limit on the number of Program Team Members. The permissions for this role can vary, and are approved by the associated Program Manager within the organization. This role does not need to match your organization's EGrAMS record.

Help us personalize SH

Select Organizations and Projects

*Your Organization

*Your Project Title(s)

+ Add Alignment

*Your Organization

*Your Project Title(s)

+ Add Alignment — Remove Alignment

Previous Submit

- Determine if you are an **Organization Lead/Authorized Representative, Program Manager, or Program Team Member**
- Users will select their **Organization** and their **Project**

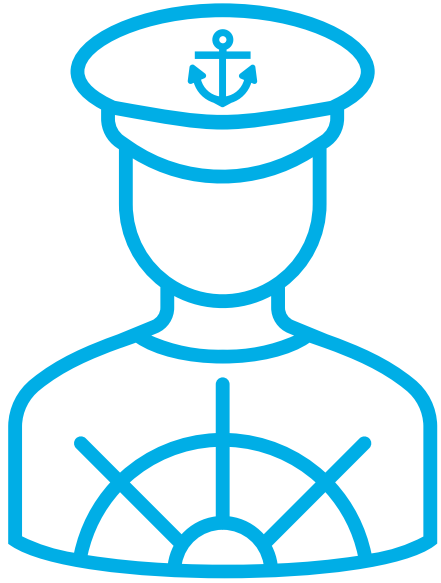


Please contact us at
MDHHS-SHOARS-Support@michigan.gov
with any questions!

REGISTRATION WITH GRANTS MANAGEMENT

SHOARS is the place to go to manage your grants. When you register, your roles should match what is in EGrAMS. Here are the three roles you can decide to register as:

- 1. ORGANIZATION LEAD:** This is the person at a partner agency who can legally sign contracts. Only one per organization, and it must match who is listed in EGrAMS as the Authorized Official. This person has access to all programs/projects held by their organization and can request amendments for all of them. They also can approve certain SHOARS permission requests for the Program Team Member role.
- 2. PROGRAM MANAGER:** Partner agency person responsible for (a) project(s)/program(s). This person can access and request amendments only for those programs and projects to which they are aligned with, and primarily responsible for. Only one per project and must match who is listed in EGrAMS. They can also approve certain SHOARS permissions for the Program Team Member role.
- 3. PROGRAM TEAM MEMBER:** By default, this role has view only access to only those programs and projects to which they are aligned. They can request additional permissions such as the ability to create and/or submit amendments, but these must be approved by either the Program Manager or Organization Lead OR DHSP can approve these individuals as well.
 - NOTE:** Organizations can have as many Program Team Members as they want - agencies can associate an unlimited number of users to their agency/grants (and the way to do this is through the Program Team Member role)!*

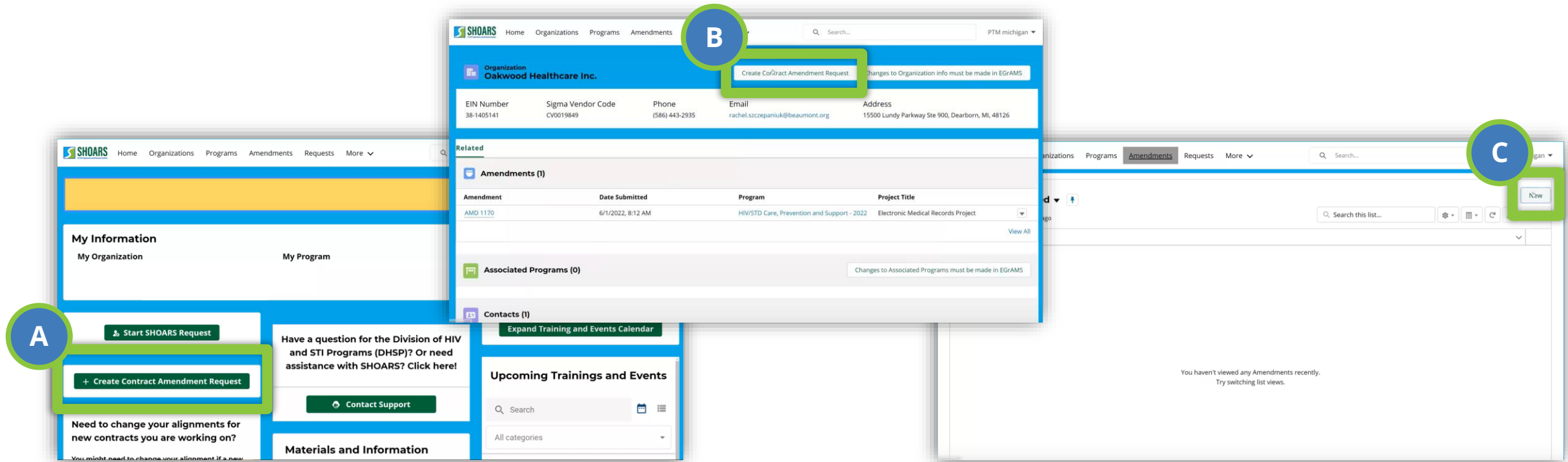


SHOARS

STI/HIV Operations and Resource System

HOW TO CREATE AN AMENDMENT REQUEST

How to Create a Contract Amendment Request



There are three areas where you can create a Contract Amendment Request:

- A.) Through the **Dashboard** by *selecting* the “+ Create Contract Amendment Request” button
- B.) Through the **“Organizations”** tab by *selecting* the “Create Contract Amendment Request” button
- C.) Through the **“Amendments”** tab by *selecting* the “New” button on the Amendments dashboard

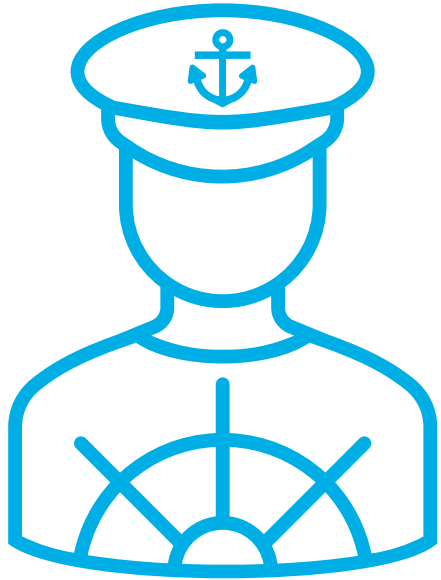
Complete the Create Contract Amendment Request

Create Contract Amendment Request

Organization*	<input type="text" value="Search Organizations..."/>	Category*	<input type="checkbox"/> Budget Increase/Decrease
Project Title*	<input type="text" value="Select an Option"/>		<input type="checkbox"/> Budget Revision, No Net Change
Project Contract Number	<input type="text"/>		<input type="checkbox"/> FaceSheet
			<input type="checkbox"/> Work Plan
		Reason for Request *	<div><div></div><div>255 characters remaining</div></div>
<div><input type="button" value="Cancel"/> <input type="button" value="Save"/></div>			

NOTE: Determine what type of amendment request you are submitting. Once you *select a category*, the system may ask for additional information based on your selection.

For “Budget Increase/Decrease” you must provide the requested change amount.

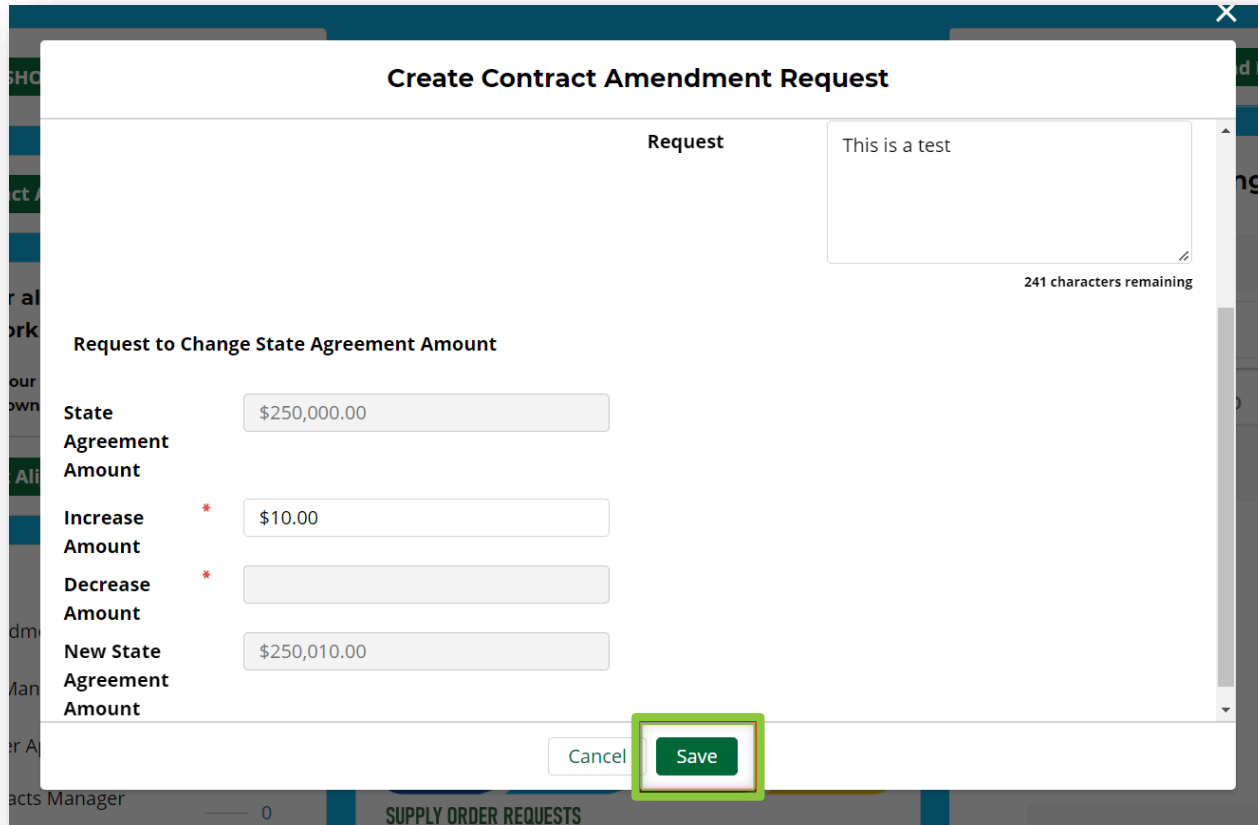


SHOARS

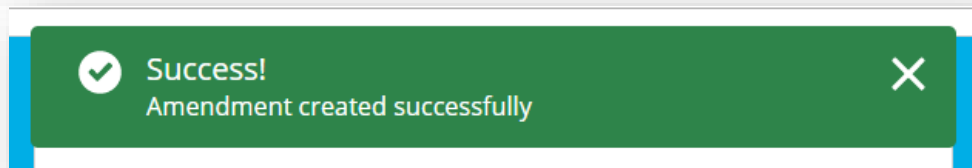
STI/HIV Operations and Resource System

HOW TO SUBMIT AMENDMENT REQUESTS FOR REVIEW

How to submit amendment requests for review



Once the “Save” button has been *selected* - the amendment has been submitted for approval and you will **no longer have access** to make updates to the record while it is in the approval process



Follow up communication after you submit an amendment request

A

Amendments

- Pending Approval Amendments 1 — 3
- Pending DHSP Internal Manager Approval — 1
- Pending Section Manager Approval — 0
- Pending Financial/Contracts Manager Approval
- Pending Operations Manager Approval
- Pending Division Director Approval
- Processing in EGrAMS 1
- Pending EGrAMS Approval Steps
- Fully Executed
- Amendment Denied
- In Revision 1

Amendment AMD 0207

Status: Draft

Notes (0)

Date of Request	8/1/2022, 3:21 PM	Reason for Request	Testing
Name	Caitlin Caitlin O'Brien	State Agreement Amount	\$5,000
Email	obrie126@gmail.com	Amount	+\$100
Phone	(810) 280 7262	New State Agreement Amount	\$5,100
Organization	SHOARS SANDBOX5678	Status	Draft
Program	Program 1 Testing is Fun		
Project Title	PROJ-446		
Category			

B

Sandbox: About your DHSP request in SHOARS AMD0205202207291307A - Message (HTML)

File Message Help Acrobat Tell me what you want to do

Ignore Delete Archive Reply Reply All Forward Meeting IM More

Save Team Email Done To Manager Reply & Delete Create New

Share to Teams Quick Steps Move Send to OneNote Mark Categorize Follow Unread Tags

Sandbox: About your DHSP request in SHOARS AMD0205202207291307A

Caitlin Hotchkiss <hotchkiss@michigan.gov>
To: Hotchkiss, Caitlin (DHHS-Contractor)

Quick follow up question regarding your amendment - are you sure you need this much funding?

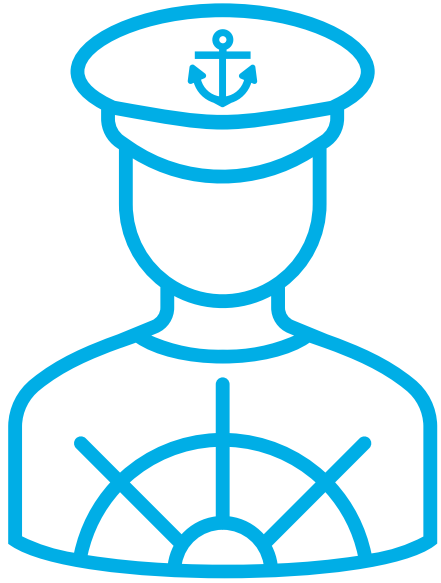
Thank you,

SHOARS Support Team

DHSP is committed to assisting you with this request; to help us do that please do not change or remove the subject line to this email.

A.) After an amendment request has been submitted, you should be able to monitor your amendment request as it moves through the approval stages in the SHOARS system (click hyperlinked number to be brought to the amendment requests at each stage)

B.) Any follow up communications will be sent from the SHOARS system as well (amendment request status updates, additional information, etc.)



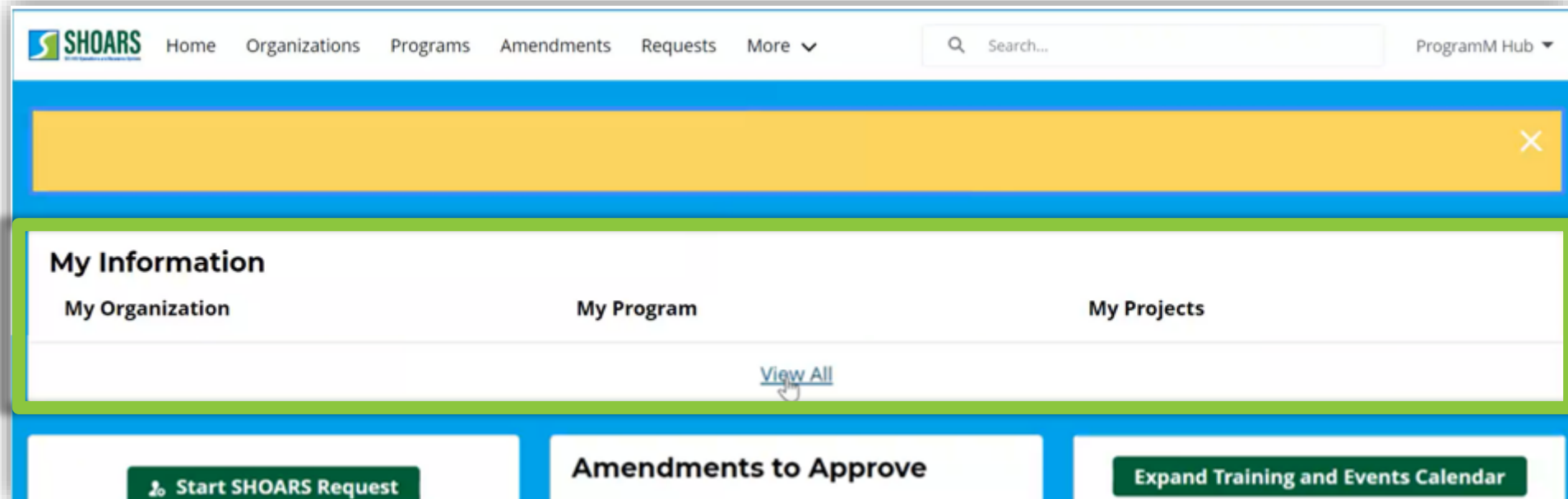
SHOARS

STI/HIV Operations and Resource System

VIEWING GRANT MANAGEMENT INFORMATION

Viewing Grant Management Information

New fields have been added to the “My Information” widget



Grants Management users can **view records** in the “My Organization”, “My Programs” and “My Projects” widgets on the SHOARS homepage. If you have more than (five) records you are aligned to, *select* the “**View All**” button and you will be taken to a list view with all your alignments

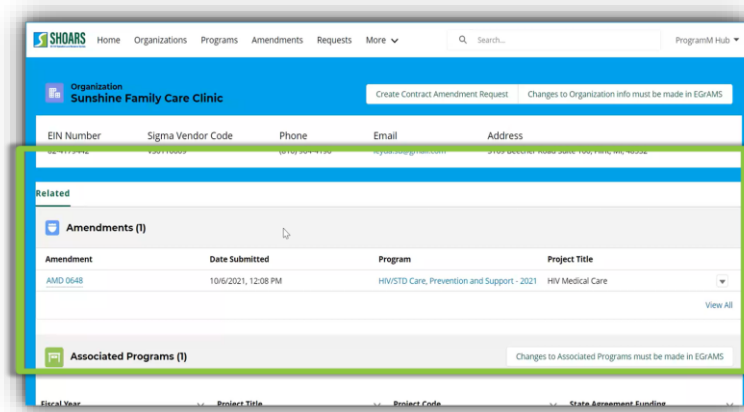
Viewing Grant Management Information

View and manage information in SHOARS



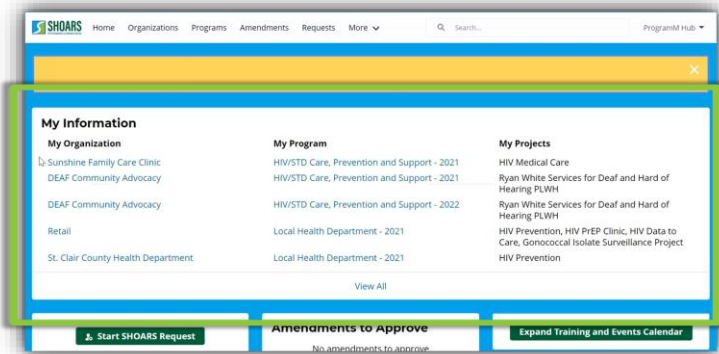
Amendment Requests

View amendment requests from the organization dashboard



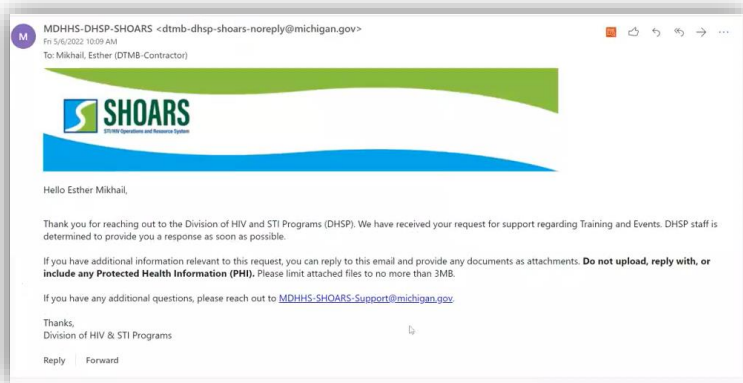
Organization & Project Information

View organization, program, and project details from the dashboard



Profile Information & Correspondence with DHSP

View and edit your personal profile as well as see and send communications with DHSP





SHOARS

STI/HIV Operations and Resource System

**Refer to the DHSP Partner
Navigation Deck for a step-by-step
guide!**



OPEN Q&A



SHOARS

STI/HIV Operations and Resource System

Thank you for joining us!

APPENDIX

What is the benefit of SHOARS?



DHSP Partner Agencies

HIV/STI Trainings One Stop Shop: One place to register and participate in trainings. The ability to see your training transcript as well as view upcoming training opportunities.

Communications: Staying connected with us is easier than ever! Signing up for SHOARS puts you on our newsletter list and helps us share important updates specific to your area of work.

Health Promotion Materials, Supplies, and Data: Requesting HIV and STI related health promotion materials, supplies, and data is now quick and easy. Everything can be done through SHOARS!

Streamlined Contract Management Support: Grant and contract details are stored in one place, increasing transparency.

DHSP

Faster, More Coordinated Agency Support

SHOARS allows DHSP to see the full picture and reply to/view messages directly from the SHOARS system to increase response time.

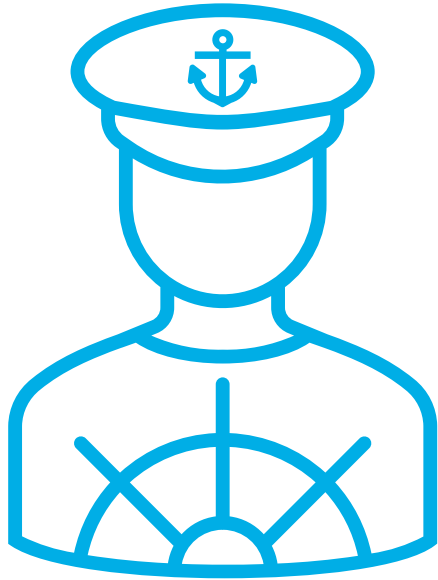
Monitoring of Amendment Request Approval Processes

Internal end-users will be able to understand when external partners make multiple requests across the Division. SHOARS will allow us to track these requests and therefore be able to meet the external partner's full needs more than before.

Increased Transparency and Tracking Capabilities

With SHOARS, DHSP will be able to more effectively manage contracts with local agencies and health departments, monitor contract spending, and streamline processes with grant-funded programs including the contract amendment process

And So Much More!



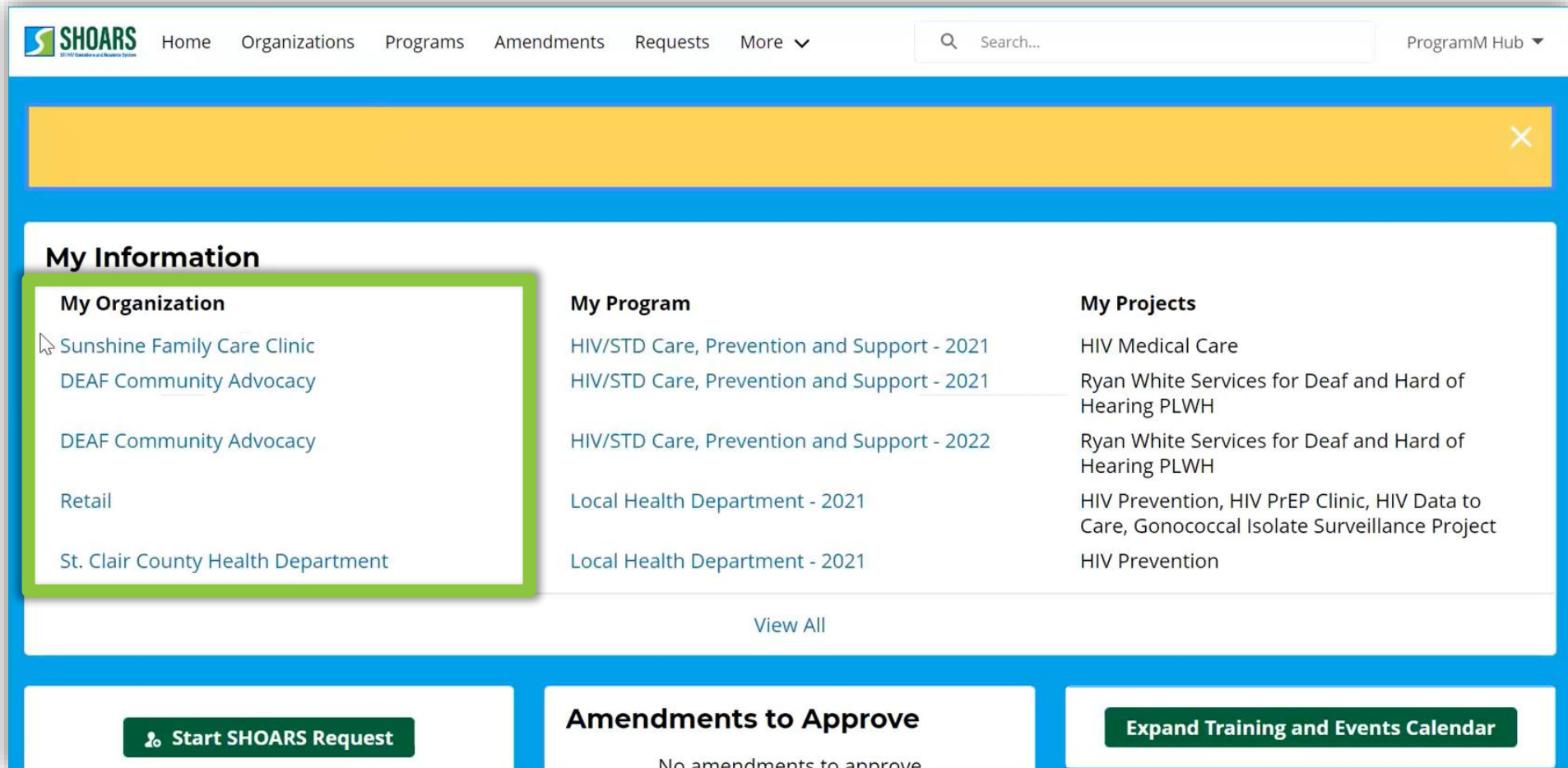
SHOARS

STI/HIV Operations and Resource System

**UPDATED ORGANIZATION
DASHBOARD TO BETTER
REFLECT GRANTS
MANAGEMENT STRUCTURE**

Updated Organization Dashboard To Better Reflect Grants Management Structure

Start the process by navigating to the My Information widget



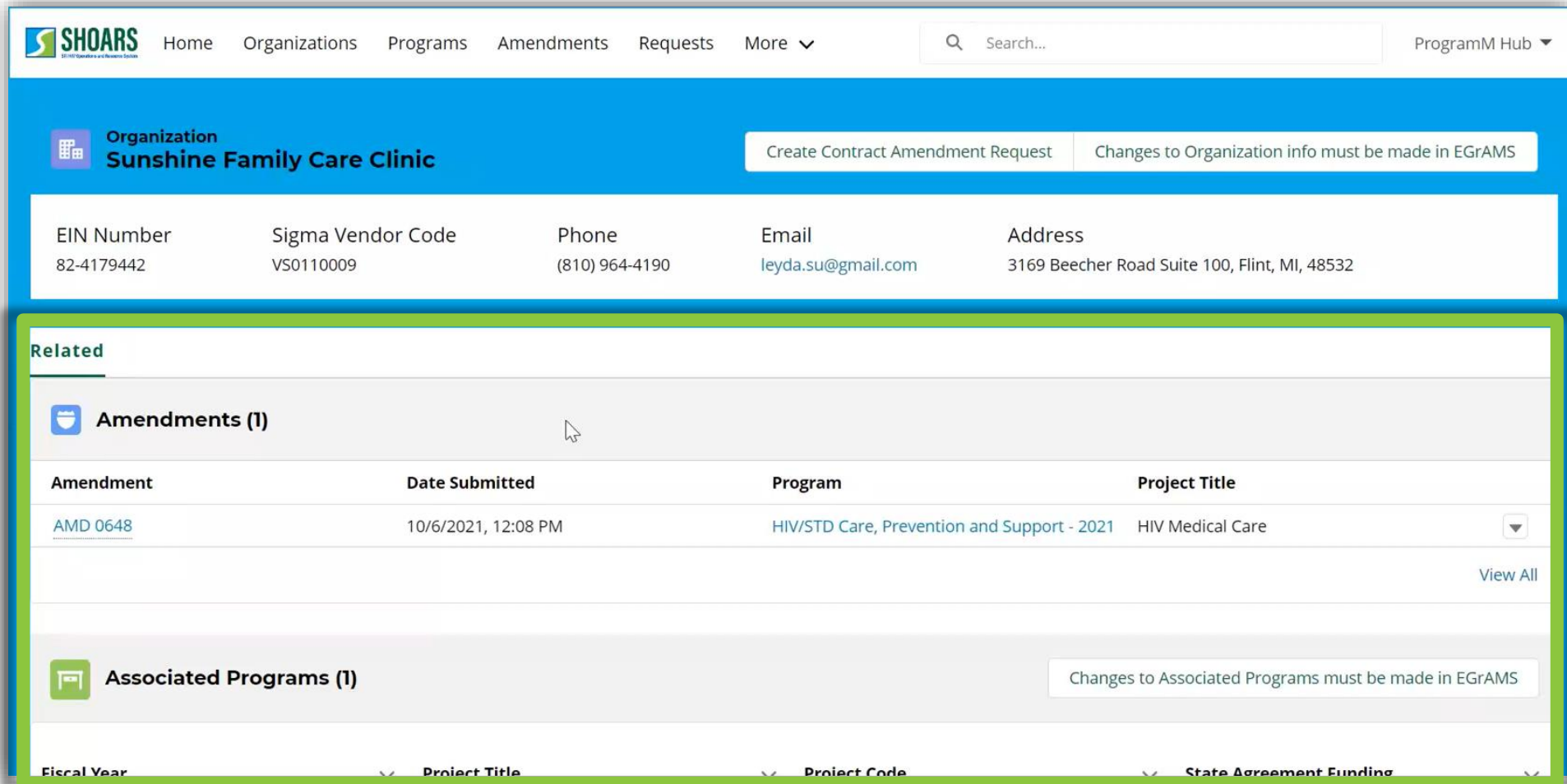
The screenshot shows the SHOARS dashboard interface. At the top is a navigation bar with links: Home, Organizations, Programs, Amendments, Requests, and More. A search bar and a 'ProgramM Hub' dropdown are also present. Below the navigation bar is a large yellow banner with a close button. The main content area features a 'My Information' widget. This widget is divided into three columns: 'My Organization', 'My Program', and 'My Projects'. The 'My Organization' column is highlighted with a green border and contains a list of organizations: Sunshine Family Care Clinic, DEAF Community Advocacy (listed twice), Retail, and St. Clair County Health Department. The 'My Program' column lists various HIV/STD care and support programs for 2021 and 2022. The 'My Projects' column lists medical care and surveillance projects. A 'View All' link is located at the bottom of the 'My Information' widget. Below the 'My Information' widget are three buttons: 'Start SHOARS Request', 'Amendments to Approve' (with the text 'No amendments to approve' below it), and 'Expand Training and Events Calendar'.

1

Select an Organization from the “My Organization” column.

Updated Organization Dashboard To Better Reflect Grants Management Structure

Updates made to the Organization dashboard



The screenshot shows the SHOARS Organization Dashboard for the Sunshine Family Care Clinic. The dashboard includes a navigation bar with links to Home, Organizations, Programs, Amendments, Requests, and More. A search bar and a ProgramM Hub dropdown are also present. The main content area displays the organization's details, including EIN Number, Sigma Vendor Code, Phone, Email, and Address. Below this, there are sections for Related items, specifically Amendments (1) and Associated Programs (1). The Amendments section shows a table with columns for Amendment, Date Submitted, Program, and Project Title. The Associated Programs section shows a table with columns for Fiscal Year, Project Title, Project Code, and State Agreement Funding.

Organization: Sunshine Family Care Clinic

Create Contract Amendment Request | Changes to Organization info must be made in EGrAMS

EIN Number	Sigma Vendor Code	Phone	Email	Address
82-4179442	VS0110009	(810) 964-4190	leyda.su@gmail.com	3169 Beecher Road Suite 100, Flint, MI, 48532

Related

Amendments (1)

Amendment	Date Submitted	Program	Project Title
AMD 0648	10/6/2021, 12:08 PM	HIV/STD Care, Prevention and Support - 2021	HIV Medical Care

[View All](#)

Associated Programs (1)

Changes to Associated Programs must be made in EGrAMS





Fiscal Year	Project Title	Project Code	State Agreement Funding
-------------	---------------	--------------	-------------------------

2

Four new widgets have been created for the Organization dashboard including: "Amendments", "Associated Program", "Contacts", and "Locations".

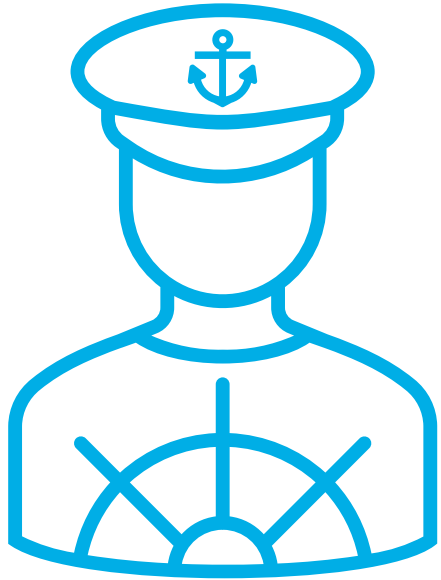
Updated Organization Dashboard To Better Reflect Grants Management Structure

Updates made to the Organization dashboard

Related			
<div>  Amendments (1) </div>			
Amendment	Date Submitted	Program	Project Title
AMD 0648	10/6/2021, 12:08 PM	HIV/STD Care, Prevention and Support - 2021	HIV Medical Care
			View All
<div>  Associated Programs (1) </div>			
Changes to Associated Programs must be made in EGrAMS			
Fiscal Year	Project Title	Project Code	State Agreement Funding
2021	HIV Medical Care	HIVMC-SF	\$1,500,000.00
			View All
<div>  Contacts (0) </div>			
<div>  Locations (0) </div>			

3

When a Grants Management user views the Organization dashboard, you will see updates to the Associated Programs widget. A new column for “Fiscal Year” is now seen and the “Program Name” field has been removed.



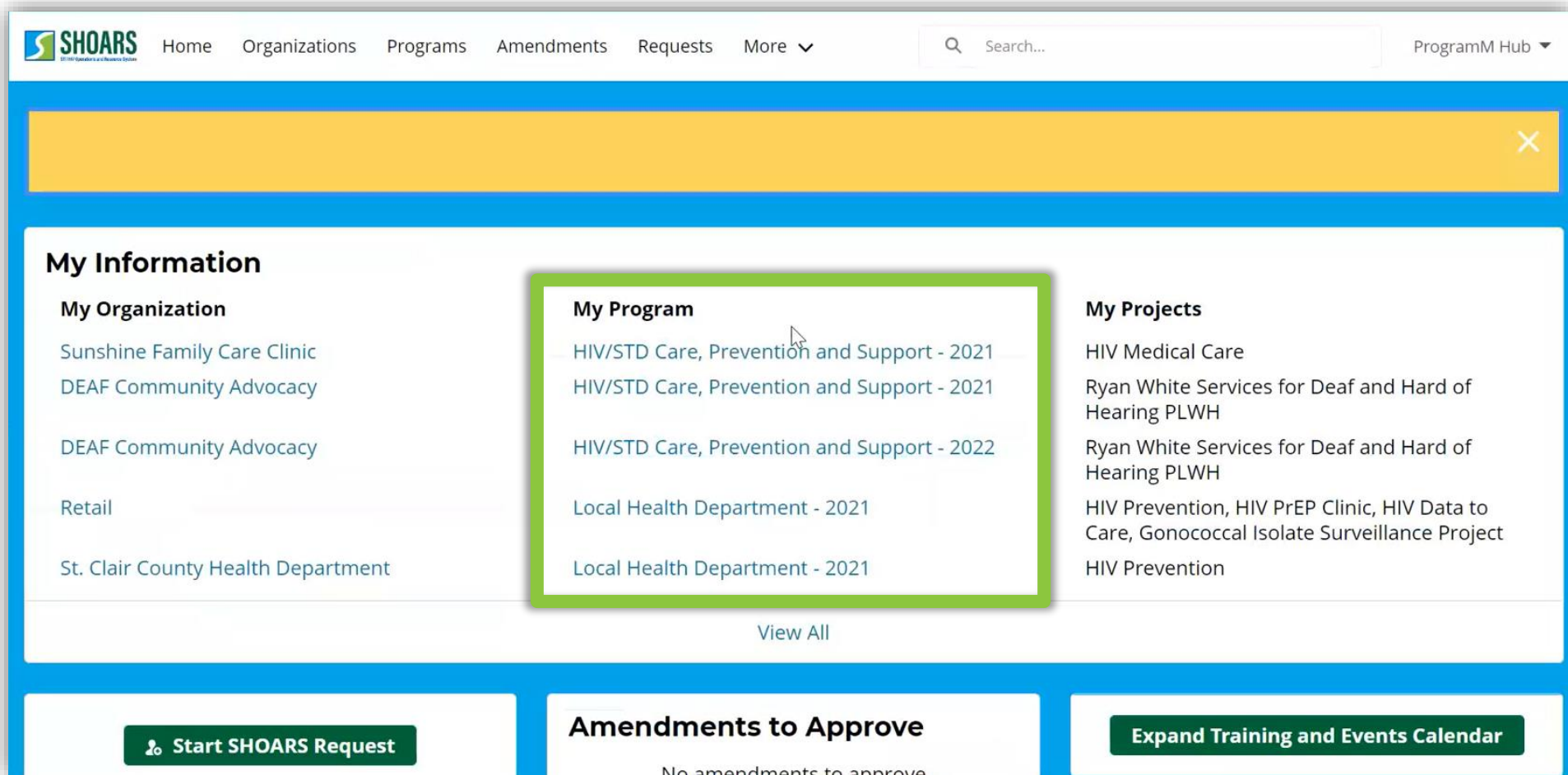
SHOARS

STI/HIV Operations and Resource System

**UPDATED PROGRAM
DASHBOARD TO BETTER
REFLECT GRANTS
MANAGEMENT
STRUCTURE**

Updated Program Dashboard To Better Reflect Grants Management Structure

Start the process by navigating to the My Information widget



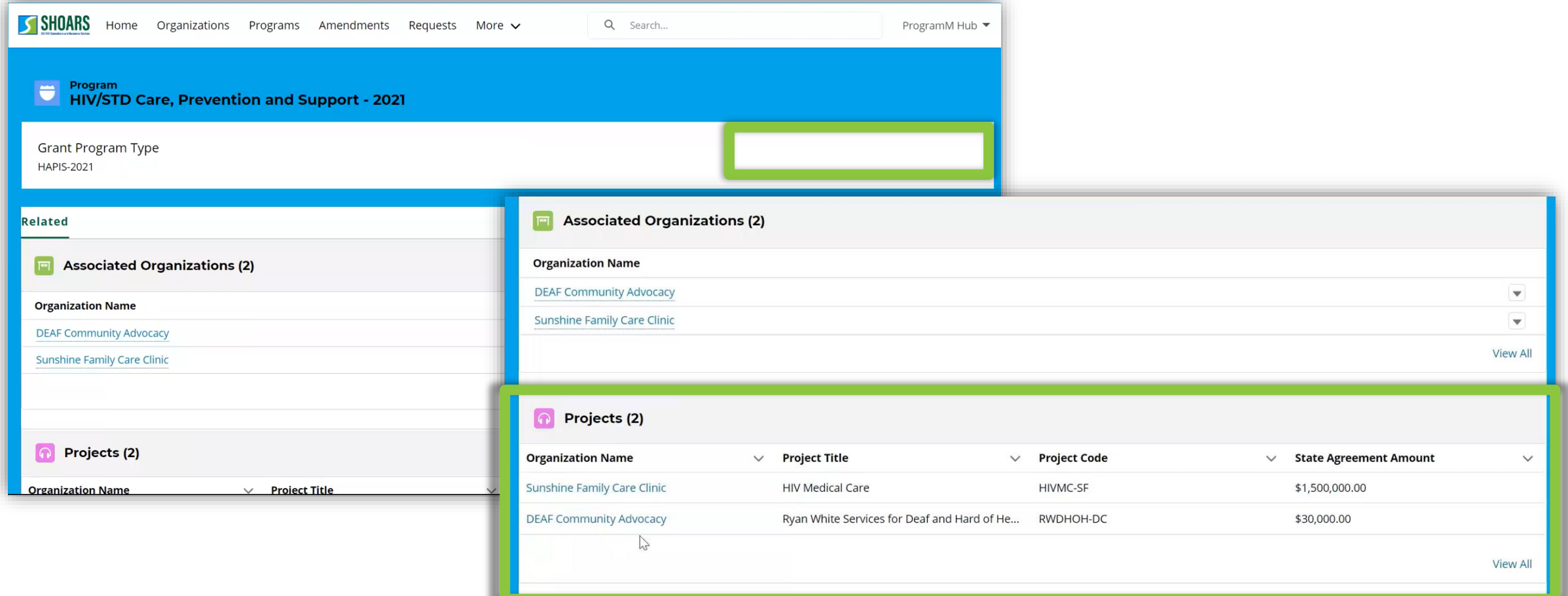
The screenshot shows the SHOARS Program Dashboard. At the top is a navigation bar with links: Home, Organizations, Programs, Amendments, Requests, and More. A search bar and a 'ProgramM Hub' dropdown are also present. Below the navigation bar is a large yellow banner with a close button. The main content area is titled 'My Information' and contains three columns: 'My Organization', 'My Program', and 'My Projects'. The 'My Program' column is highlighted with a green border and contains a list of programs: 'HIV/STD Care, Prevention and Support - 2021' (two entries), 'HIV/STD Care, Prevention and Support - 2022', 'Local Health Department - 2021' (two entries), and a 'View All' link. The 'My Organization' column lists: 'Sunshine Family Care Clinic', 'DEAF Community Advocacy' (two entries), 'Retail', and 'St. Clair County Health Department'. The 'My Projects' column lists: 'HIV Medical Care', 'Ryan White Services for Deaf and Hard of Hearing PLWH' (two entries), 'HIV Prevention, HIV PrEP Clinic, HIV Data to Care, Gonococcal Isolate Surveillance Project', and 'HIV Prevention'. At the bottom of the dashboard are three buttons: 'Start SHOARS Request', 'Amendments to Approve' (with a subtext 'No amendments to approve'), and 'Expand Training and Events Calendar'.

1

Select a Program from the "My Program" column.

Updated Program Dashboard To Better Reflect Grants Management Structure

Updates made to the Program dashboard



Program
HIV/STD Care, Prevention and Support - 2021

Grant Program Type
HAPIS-2021

Related

Associated Organizations (2)

Organization Name

[DEAF Community Advocacy](#)

[Sunshine Family Care Clinic](#)

[View All](#)

Projects (2)

Organization Name	Project Title	Project Code	State Agreement Amount
Sunshine Family Care Clinic	HIV Medical Care	HIVMC-SF	\$1,500,000.00
DEAF Community Advocacy	Ryan White Services for Deaf and Hard of Hearing	RWDHOH-DC	\$30,000.00

[View All](#)

2

Two updates have been made to the Program Dashboard

1.) When viewing the dashboard, you will see the "Create Contract Amendment" button has been removed from the Program dashboard.

2.) The "Organization Name" column has been added to the Projects widget.