SHOARS

STI/HIV Operations and Resource System

Funded Agency Training

August 3, 2022

Welcome

Meet your instructors

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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

Agenda

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

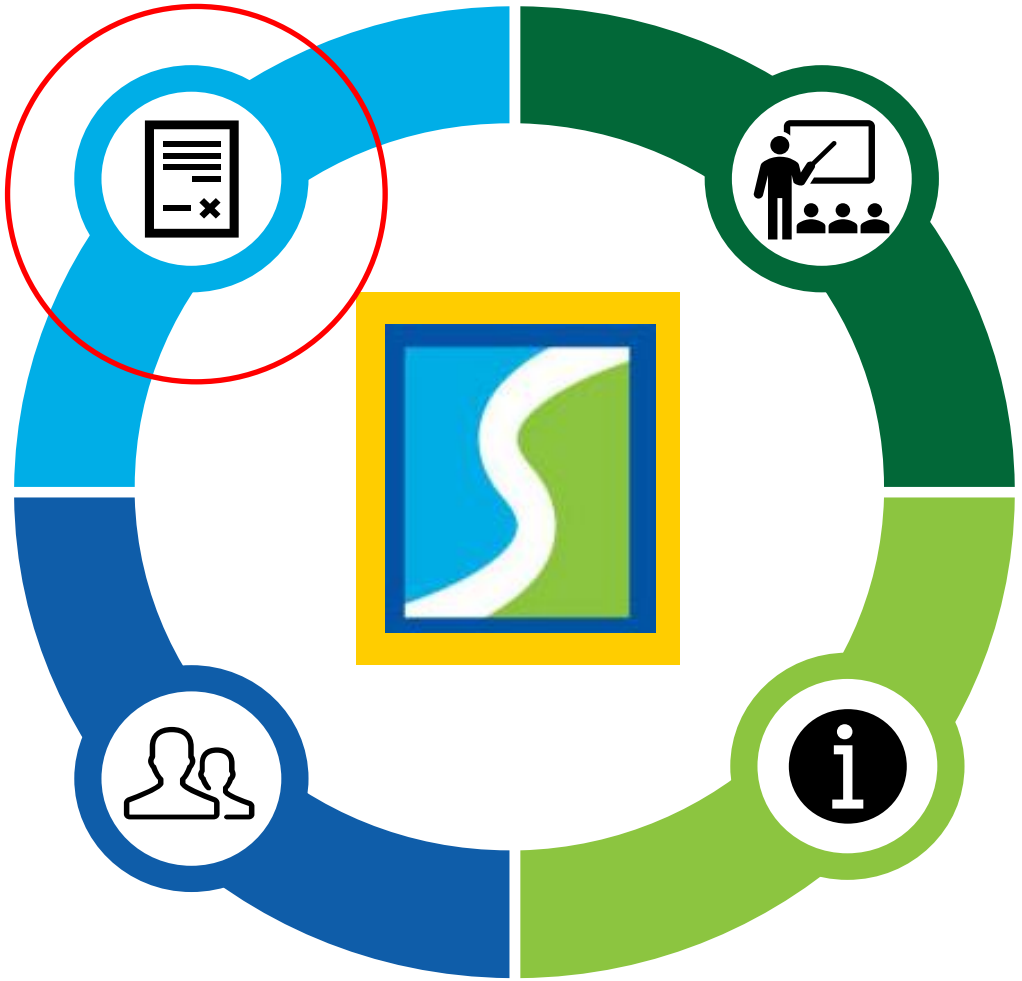
IS NOT

- 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)

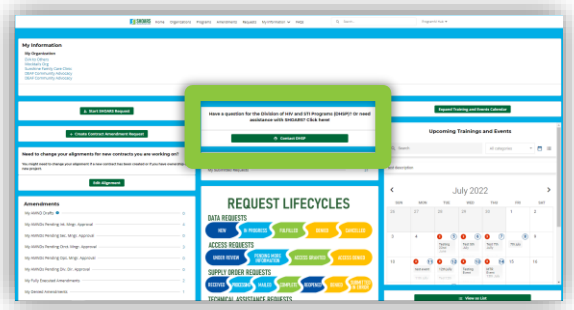
- Has restricted privileges to only those projects they are directly aligned with
- Can have as many PTMs as needed
- Additional privileges can be granted by agency's OL/AR or PM
- Does not need to be aligned with EGrAMS
- **Optional**

Two-Way Communication

Reach out to SHOARS Support/DHSP from the homepage

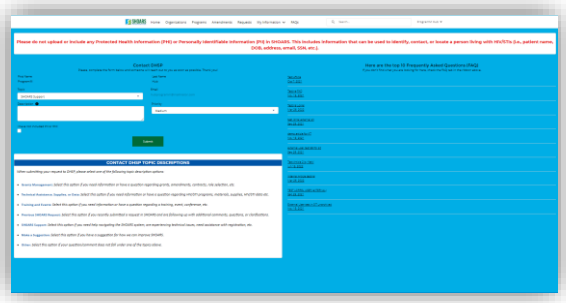
Select the Contact DHSP button

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



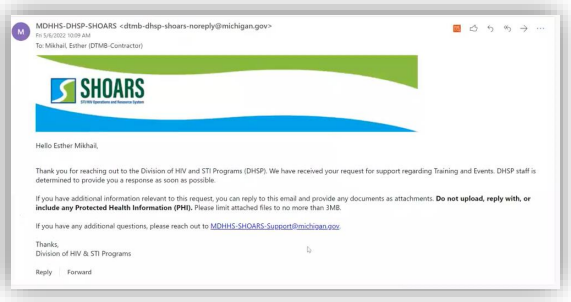
Compete the Contact SHOARS Support Form

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

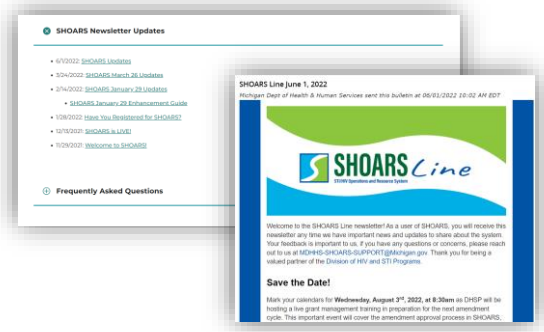
1 Micro Learning Videos

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!

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One more important reminder regarding SHOARS:

Have your colleagues join SHOARS!

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SHOARS BEGINS WITH REGISTRATION

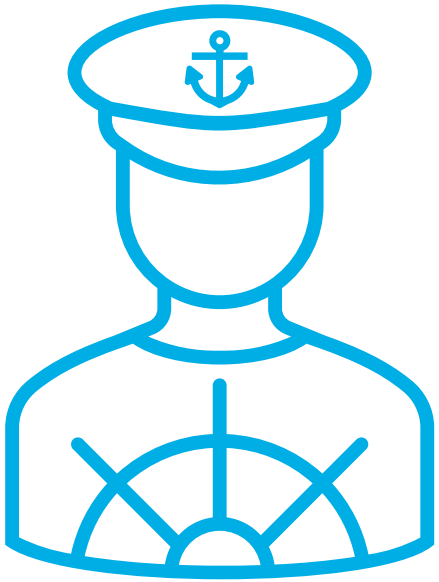
There are FOUR steps required to get access to SHOARS

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

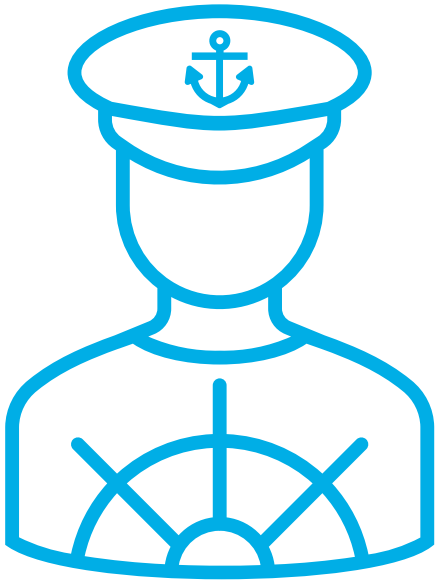
STI/HIV Operations and Resource System

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

- 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***



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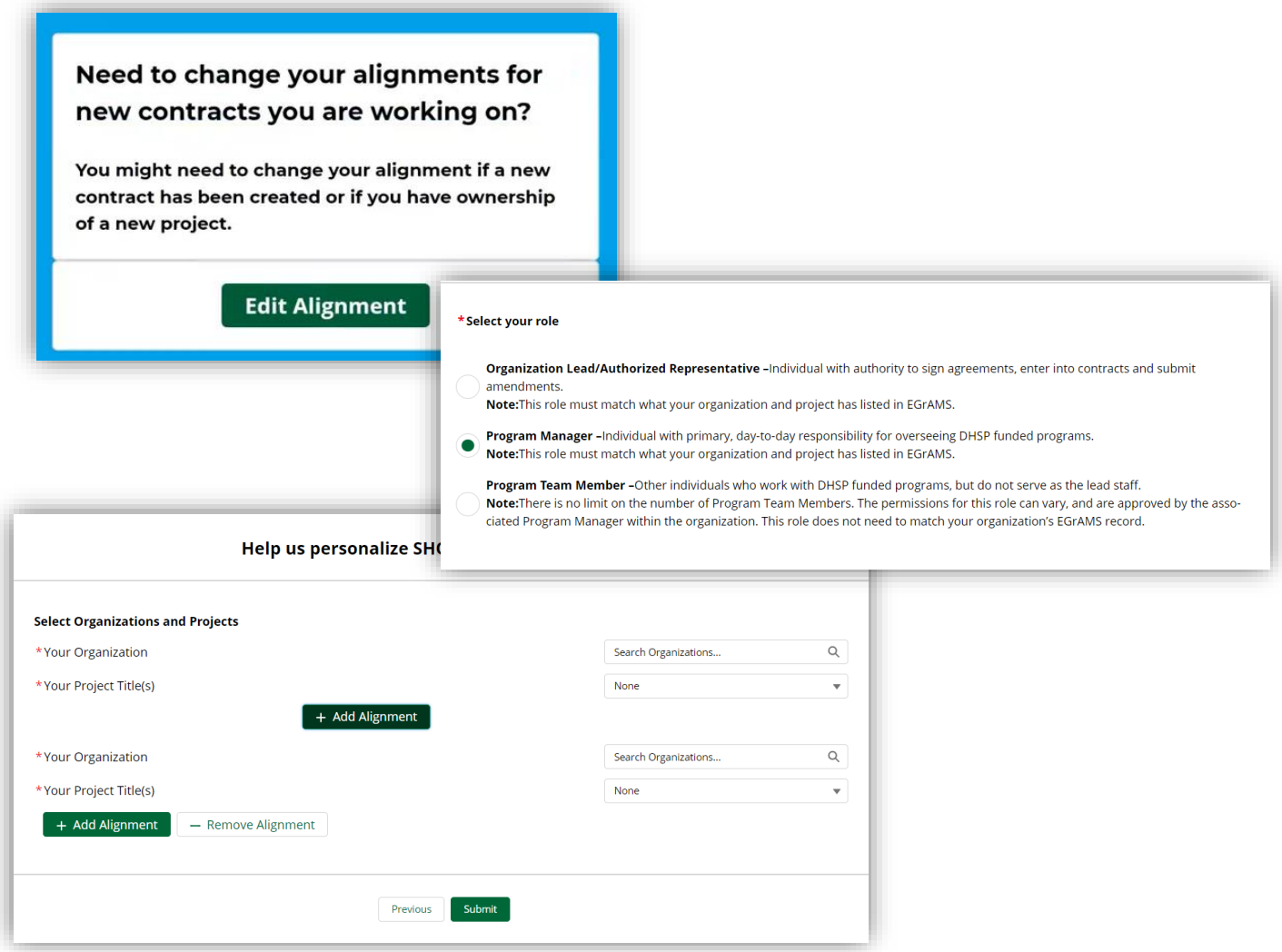
HOW TO CHANGE ROLES & ALIGNMENTS

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



- Determine if you are an **Organization Lead/ Authorized Representative, Program Manager,** or **Program Team Member**

- Users will select their **Organization** and their **Project**

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

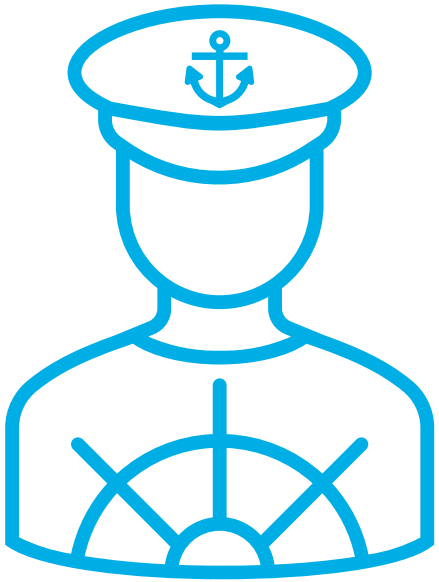
REGISTRATION WITH GRANTS MANAGEMENT

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)!*



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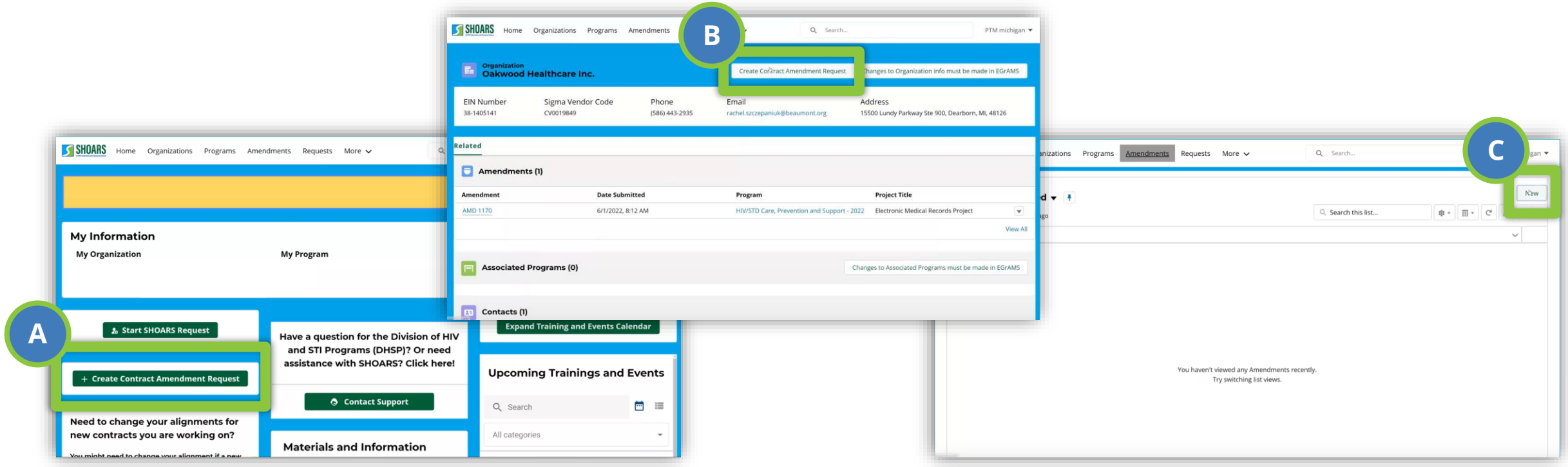
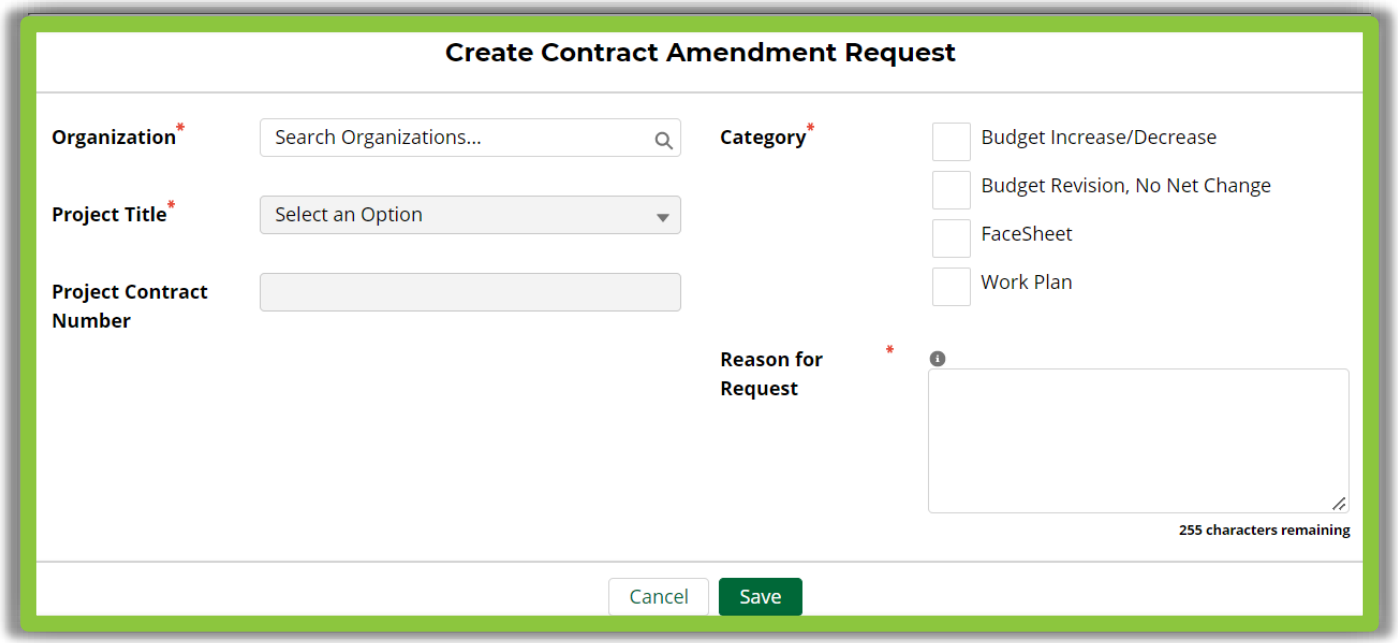
HOW TO CREATE AN AMENDMENT REQUEST

How to Create a Contract Amendment Request



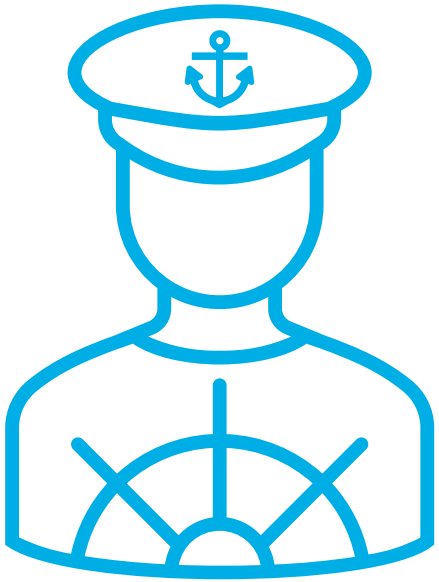
There are three areas where you can create a Contract Amendment Request:
A.) Through the **Dashboard** by *selecting* the "+ Create Contract Amendment Request" button
B.) Through the **"Organizations"** tab by *selecting* the "Create Contract Amendment Request" button
C.) Through the **"Amendments"** tab by *selecting* the "New" button on the Amendments dashboard

Complete the Create Contract Amendment Request



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.



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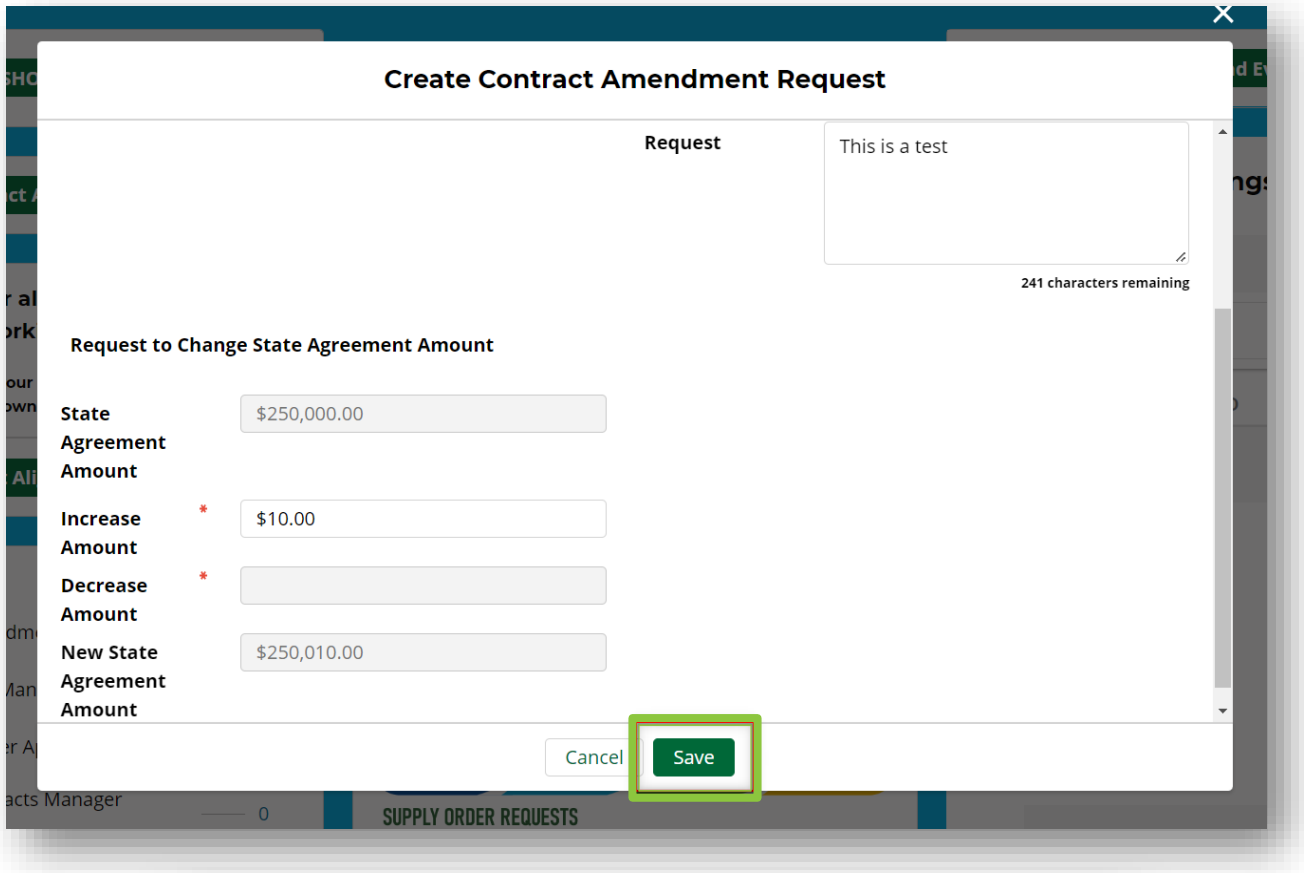
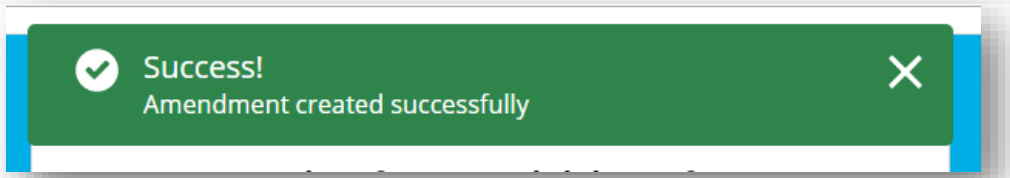
HOW TO SUBMIT AMENDMENT REQUESTS FOR REVIEW

How to submit amendment requests for review

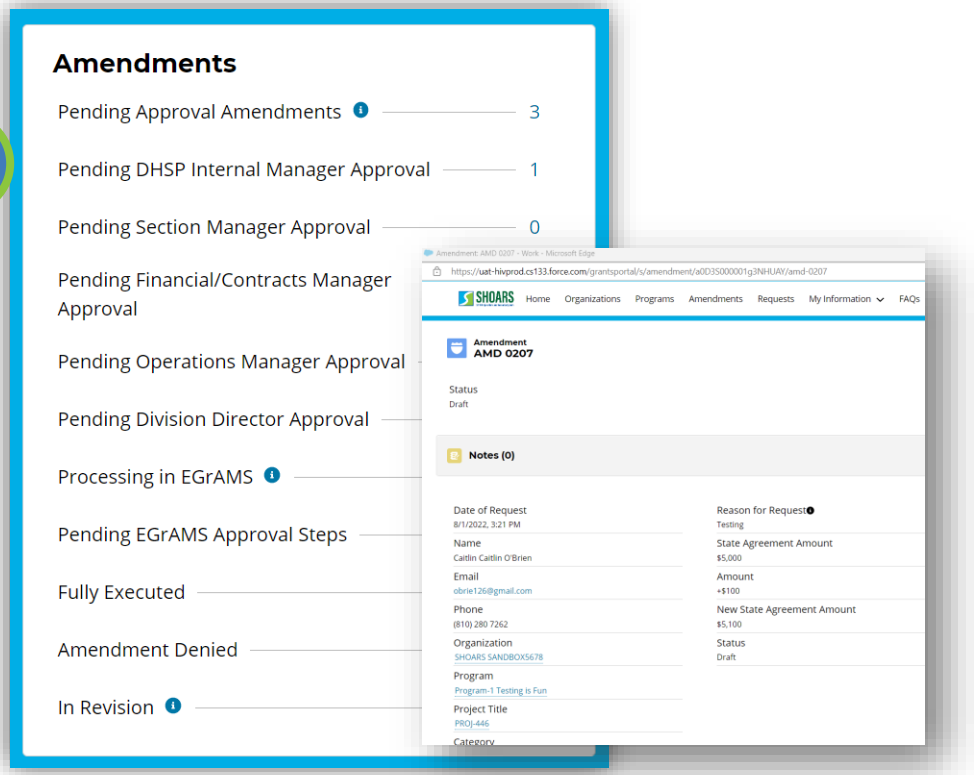




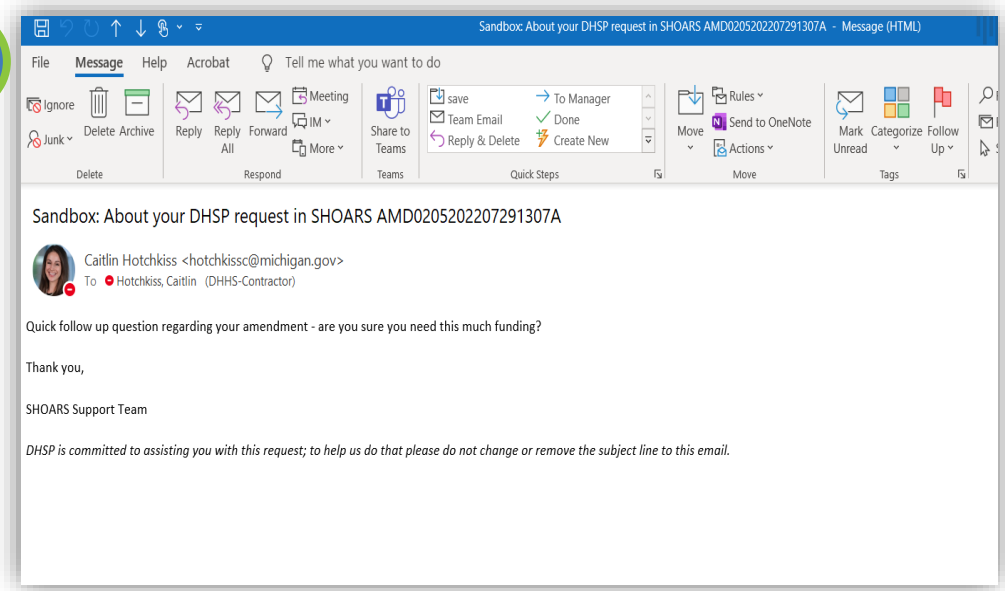
Once the "Save" button has been *selected* - the amendment has been submitted for approval and you will **no longer have access** to make updates to the record while it is in the approval process

Follow up communication after you submit an amendment request

A

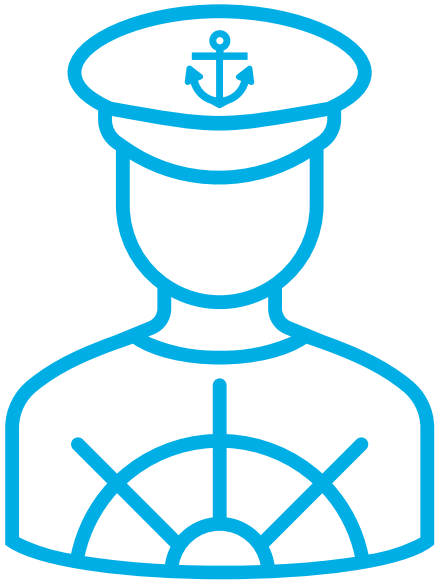


B



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.)



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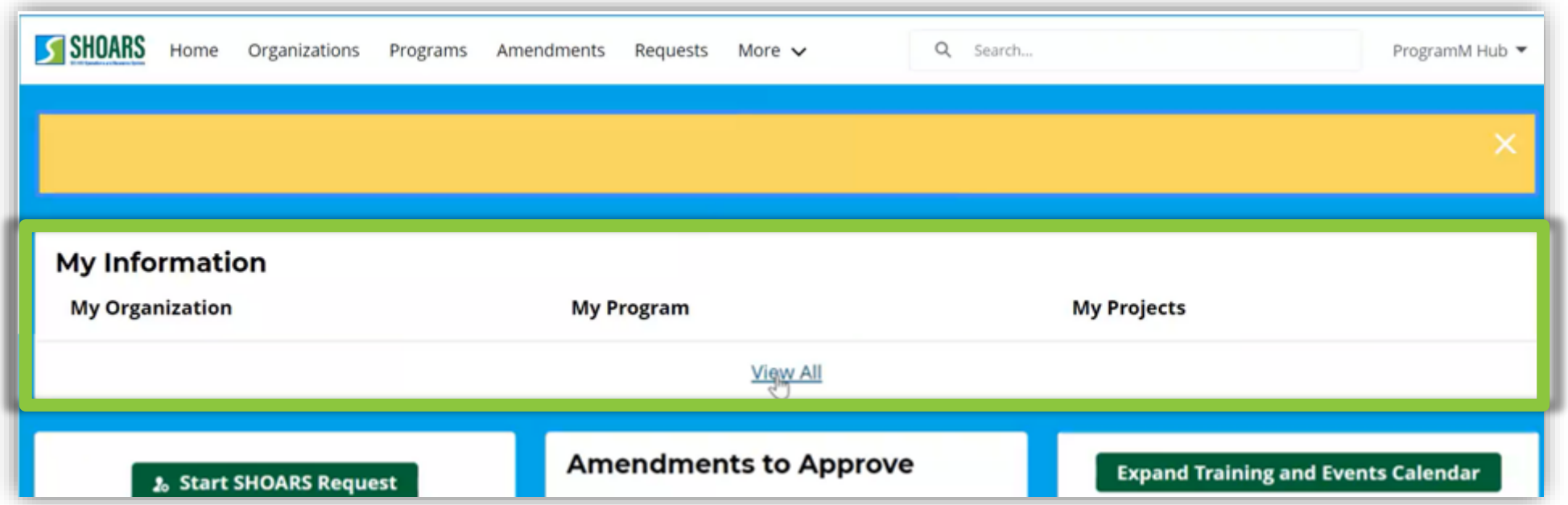
VIEWING GRANT MANAGEMENT INFORMATION

Viewing Grant Management Information

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



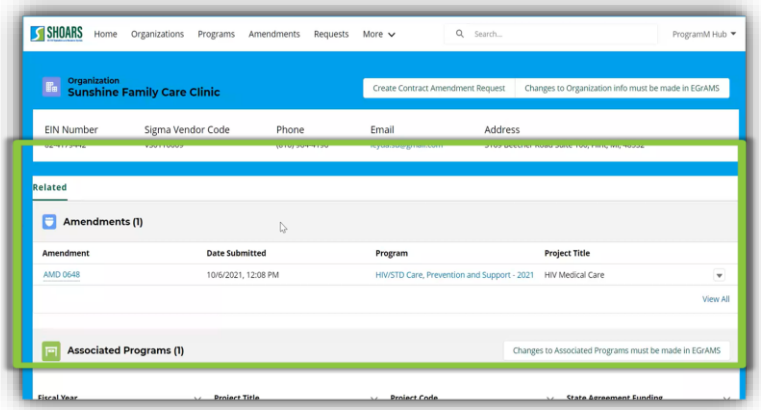
Grants Management users can ***view*** **records** in the “My Organization”, “My Programs” and “My Projects” widgets on the SHOARS homepage. If you have more than (five) records you are aligned to, *select* the **“View All”** button and you will be taken to a list view with all your alignments

Viewing Grant Management Information

View and manage information in SHOARS

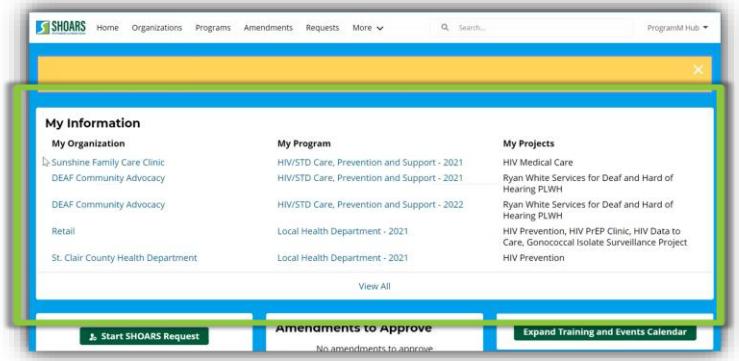
Amendment Requests

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

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

OPEN Q&A

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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.

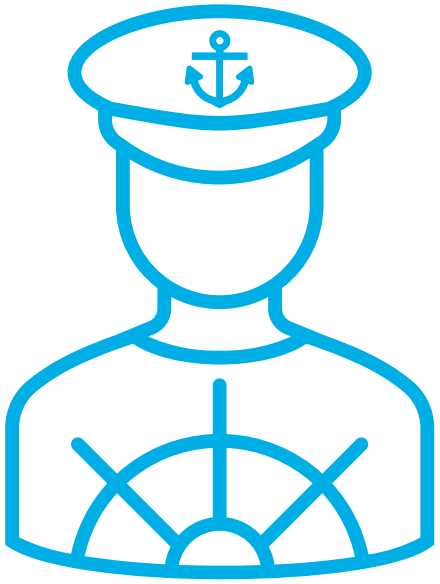
DHSP

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!



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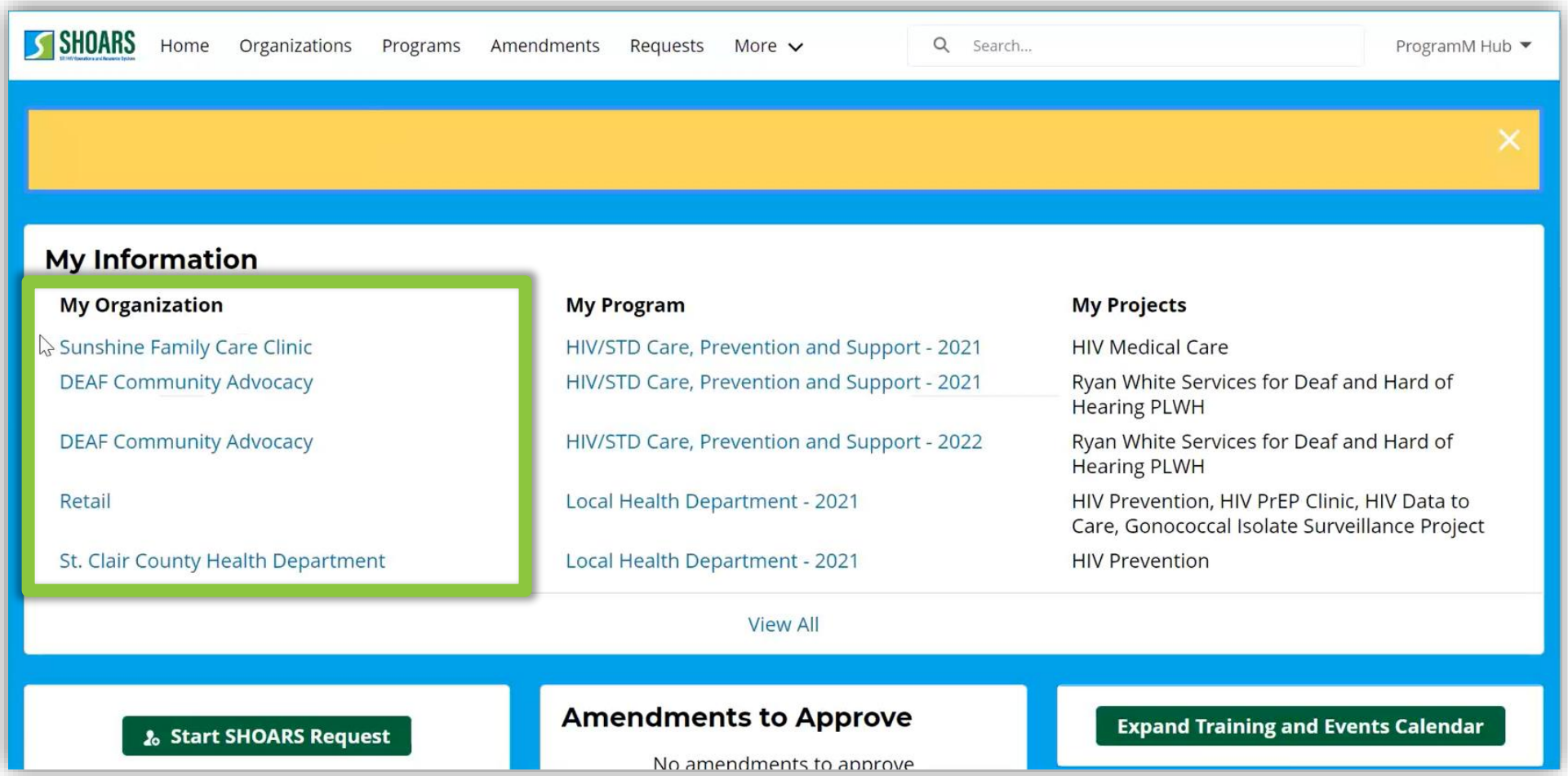
UPDATED ORGANIZATION DASHBOARD TO BETTER REFLECT GRANTS MANAGEMENT STRUCTURE

US: 135393

Updated Organization Dashboard To Better Reflect Grants Management Structure

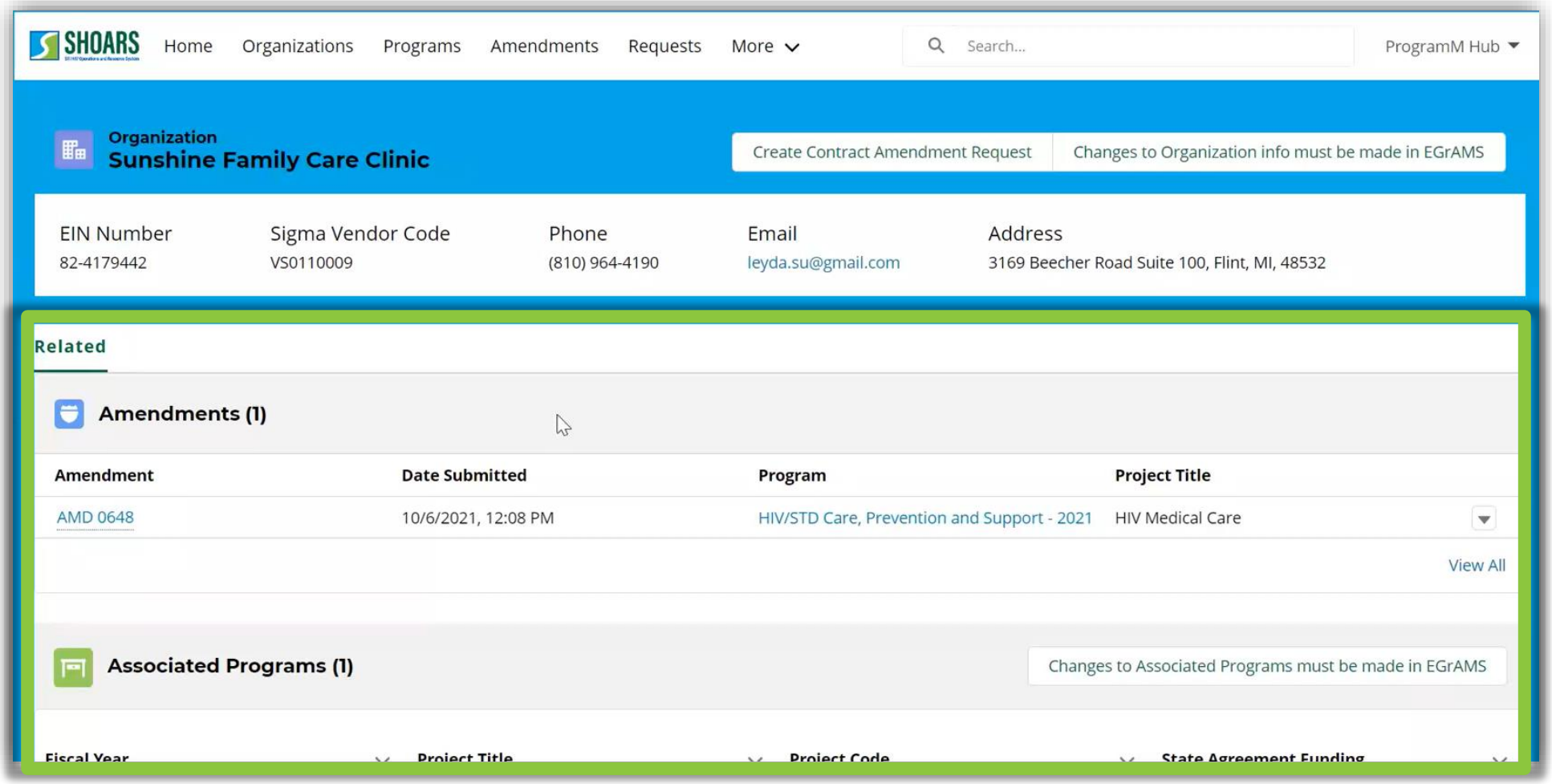
Start the process by navigating to the My Information widget



1 *Select* an Organization from the "My Organization" column.

Updated Organization Dashboard To Better Reflect Grants Management Structure

Updates made to the Organization dashboard

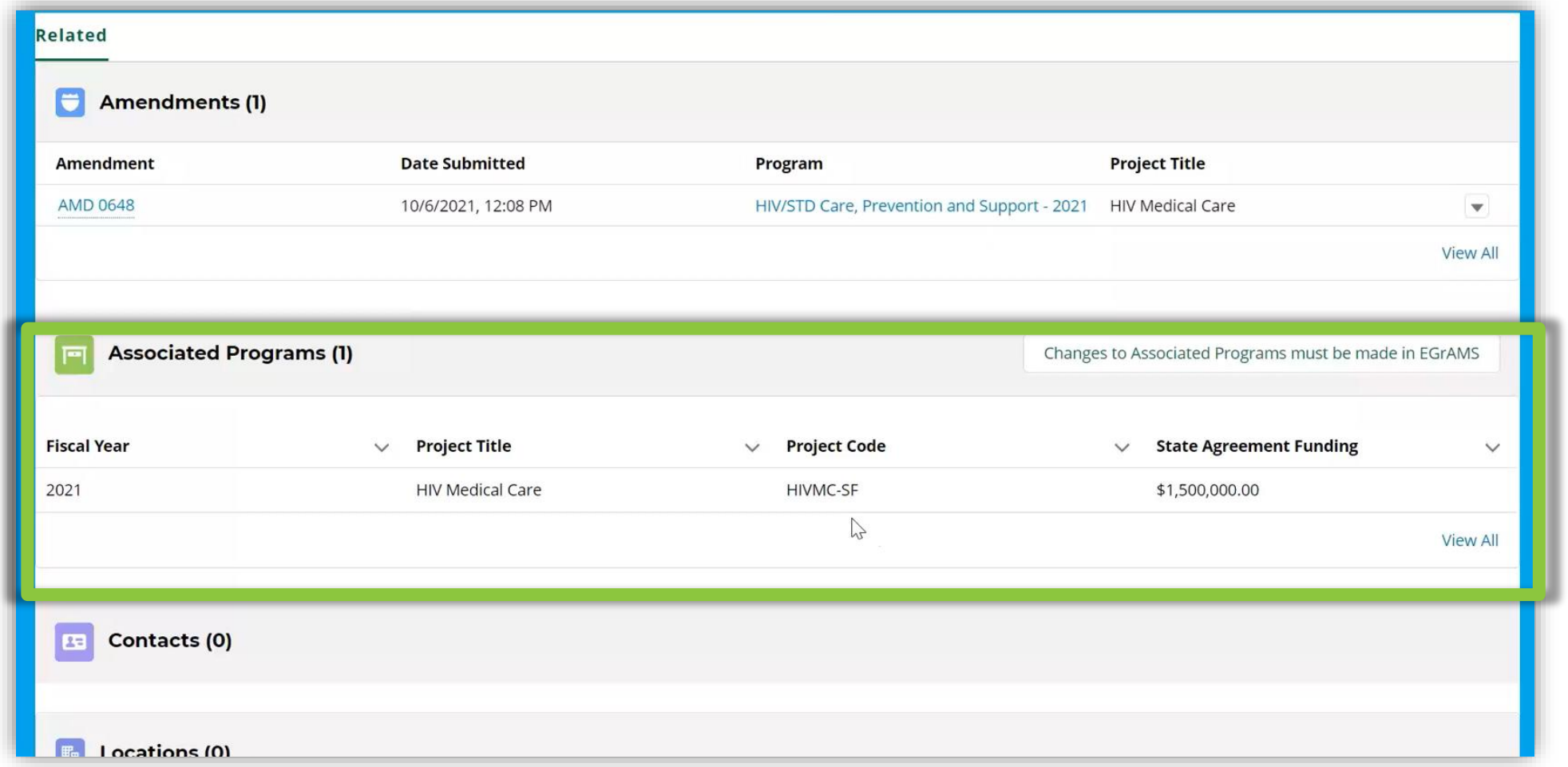


2

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

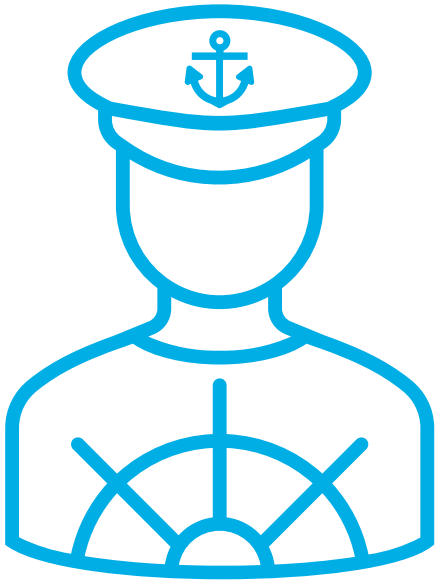
Updated Organization Dashboard To Better Reflect Grants Management Structure

Updates made to the Organization dashboard



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.



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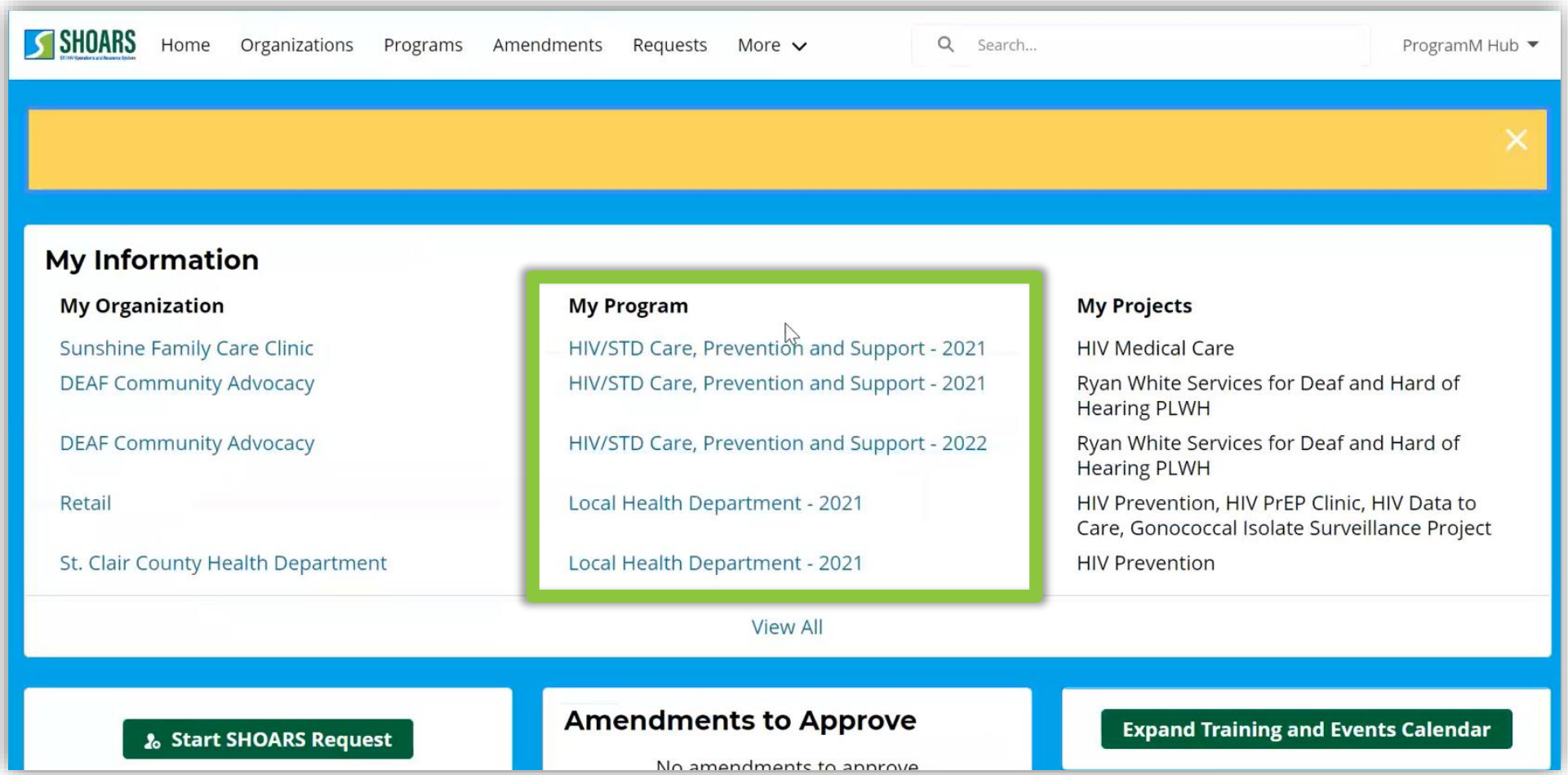
UPDATED PROGRAM DASHBOARD TO BETTER REFLECT GRANTS MANAGEMENT STRUCTURE

US: 135395

Updated Program Dashboard To Better Reflect Grants Management Structure

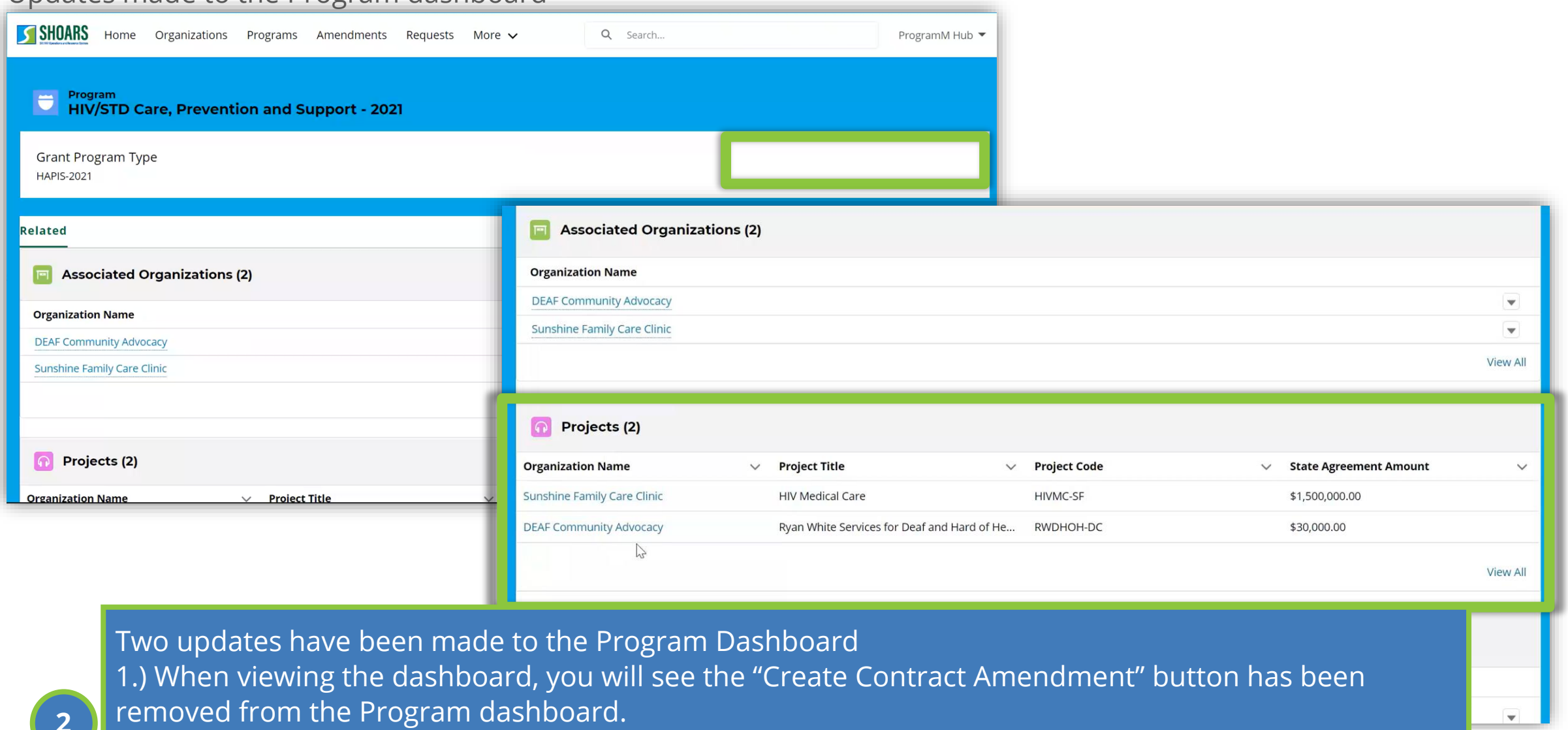
Start the process by navigating to the My Information widget



1 *Select* a Program from the “My Program” column.

Updated Program Dashboard To Better Reflect Grants Management Structure

Updates made to the Program dashboard



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.