Subrecipient User Roles

Transaction Workflow

Utah Grants utilizes a 2-step process for items submitted by subrecipients to the USBE. This 2-step process is used for the submission of grant applications and revisions, budget revisions, payment requests and progress reports.

An individual with a role of **Creator** is the first step, while the **Approver** is the second. The **Approver** role should be limited to individual(s) who can legally bind the organization.

To allow for flexibility within an organization, an individual in an **Approver** role can create or initiate a task, but cannot approve their own task. A separate **Approver** would be needed for the 2-step approval process.

Subrecipient Creator → Subrecipient Approver → USBE Program Specialist

User Roles

Role	Utah Grants Activities	Typical Title
Creator	Read, create, and update: applications, payment requests, budget revisions and progress reports.	Business Manager Management Company Program Manager Management Company/Consultant
Approver	Same as Creator plus approve & submit grant applications, payment requests, budget revisions and progress reports.	Vice President, CEO, CFO Business Administrator Superintendent Director of Finance

Key Point of Contact

Each organization will need to assign a single Key Point of Contact (POC). This individual will be assigned the **Approver** role and functionality. Additionally, this individual will be copied on organization-level communications, award letters, etc. This individual manages the organization profile and users (user access administrator). Default individual for approvals (unless changed by the creator).

Adding New Users

The Key POC is responsible for users access in Utah Grants. Please see *Managing Users in Utah Grants* for more information.

Questions

If you have questions, please contact:

UtahGrants Help Line
UtahGrants@schools.utah.gov
(801) 538-7604