Set Project View ...................................................................................................................... 3
Program Planning Menu ........................................................................................................... 3
Class Plan ................................................................................................................................. 3
  3.1 Non Rate Based Classes - Edit .......................................................................................... 4
Class Funding Detail ............................................................................................................... 5
Supplemental and Foundation Funding .................................................................................... 5
Staff Plan – Direct Funding ...................................................................................................... 5
Agency Staff Salary Report – Direct Funding ......................................................................... 7
Project Staff Salary Report – Direct Funding ......................................................................... 7
Summary Sheet – Direct Funding ............................................................................................ 7
Staff Plan – Match Funding ..................................................................................................... 7
Project Staff Salary Report – Match Funding ......................................................................... 7
Summary Sheet – Match Funding ............................................................................................ 7
Administrative Cost .................................................................................................................. 8
Program Plan Status ............................................................................................................... 8
Request Funding ....................................................................................................................... 8
1 Set Project View

The Set View in the Main Menu allows users to select the project within the agency to design the program plan. Projects in SMARTT are set up by fund code. If changes need to be made to the project and site structures in SMARTT, e-mail Donna Cornellier at dcornellier@doe.mass.edu.

♦ The Current Agency and project is displayed. The current project is set to the current project in SMARTT.

♦ If you want to change projects, click on the drop down box, select another project, and select Set View.

♦ Program Specialists will have the option of selecting any agency and any project in the drop down box. They have “view only” rights to all agencies and projects.

2 Program Planning Menu

The Program Planning Main Menu allows users to select which parts of the Program Plan to review or edit. The label at the top indicates the status: Working or Approved. It also indicates the program plan fiscal year. You can click on the link at the bottom of the menu to view a different version of the plan – approved or working. All the links in the menu refer to the status listed at the top. In this case, all links in the menu bring you to pages in the "Working" version of the plan.

♦ If you are reviewing pages in the "Approved" plan, there will be no edit links since the plan is locked.

♦ Once the plan is approved, a new working plan is created and available at all times in case changes need to be made to the current approved plan. Once the changes are made, the new working plan needs to be submitted for approval.

♦ The "Program Plan Status" shows the history of all the plans for the current project in the current fiscal year. The status is: Current Working Plan, Current Approved Plan, and Archived Plans.

♦ If you modify the plan throughout the year and submit the new working plan for approval, the rows that have been changed will be color coded to highlight the changes.

3 Class Plan

The class plan allows users to design and set-up the advising activity. These advising activities are labeled as non rate based classes in SMARTT. Please enter all summer classes first (if offered) and enter a generic start date of July 1, 2014 and end date of August 31, 2014. You will enter the actual number of weeks that the class is offered during that timeframe. Then enter full year classes with a generic start date of September 1, 2014 and end date of June 30, 2015. Then enter the actual number of weeks and days that the class is offered during that timeframe. This gives you flexibility if classes don’t start on a specific date. If you know that the classes are semester based, then enter generic dates for each semester.
Once you have entered and saved 5 rows, an additional 5 rows are displayed for data entry.

Each class must be entered on a separate line.

For any class row entered, all columns of data are required.

All summer classes offered in July and August must be entered on a separate row.

When the new fiscal year begins, classes will be listed in the “Post Planning-Class Completion” section.

Make sure the class focus is correct for each class.

Columns that are automatically calculated are coded in yellow.

Enter number of full weeks and then number of additional days in the “Weeks per Year” column.

Summary rows for ABE and ESOL class information display ABE and ESOL class totals. The totals displayed for non rate based classes are class hours, total number of classes, eligible cost, and total cost.

The print links are added so that these long class pages can be printed in two sections.

Be sure to set the print setup in the browser to landscape mode.

### 3.1 Non Rate Based Classes - Edit

This screen allows the user to design non-rate based classes and set-up the advising activity and enter estimated costs. Be sure to select the correct class focus.

**The class selections for non-rate based classes are:**

- College for Success (R)
- Technology (R)
- Developmental Math
- Developmental / Basic Writing
- Developmental Reading
- Developmental Reading/Writing
- Algebra
- Exploration in Science
- Directed Student Activity
- Advising – *This activity is designed to capture intentional scheduled formal advising. Only advising sessions of 15 minutes or longer should be entered. SMARTT captures advising time in 15 minute increments.*

The class code will be calculated automatically when you hit the SAVE button. The service type determines the code range (N400's or N800's). The code is calculated by the following rules:

<table>
<thead>
<tr>
<th>Service Type</th>
<th>Level Range</th>
<th>Class Code Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABE/ASE</td>
<td>0 – 12</td>
<td>N400 – 499</td>
</tr>
<tr>
<td>ESOL</td>
<td>0 – 7</td>
<td>N800 – 899</td>
</tr>
</tbody>
</table>
The 3 command buttons are:
- Save (saves the data to the database and returns you to the updated class plan)
- Reset (resets the values of the fields to the initial values they had when the page was created/displayed; i.e., resets to the values before the user made any edits)
- Cancel (allows the user to leave the page without making any changes; i.e., it ignores any edits you made and returns you to the view only class plan)

4 Class Funding Detail
Please select fund codes correctly for each class. Only these selections apply.

Direct Funding
- 668 Transitions

Match Funding
- Other

5 Supplemental and Foundation Funding
The supplemental and foundation funding does not apply for transitions. The only category that might be utilized under “Foundation Funding” is “Unrestricted” to ensure that the total funding matches the grant award.

6 Staff Plan – Direct Funding
- Select the appropriate category for all staff: Administrator (A), Professional (P) or Support (S) according to the following guidelines/definitions.
  - Administrator (A): includes Directors, Coordinators and any other staff who have overall supervising and administration responsibilities
  - Professional (P): includes Teachers, Educational Counselors/ADA Coordinators, Technology Coordinators, Program and Staff Development Facilitators, Community Planners
  - Support (S): includes Data Entry Staff, Clerical Staff, Support Staff

- Select the appropriate title for staff. If a staff person has multiple roles that are in two categories (for example “A” and “P” or “P” and “S”), the hours for each category must be listed separately on the SMARTT staff plan and in the budget. Also, for each position use the title that applies to the majority of hours.

A  Assistant Coordinator
A  Coordinator
A  Executive Director
A  Site Coordinator
A  Assistant Director
A  Director
A  Fiscal Officer

P  ADA Coordinator
P  Community Planner
P  Computer Teacher
P  Early Childhood Teacher
P  Educational and Career Advisor
P  Health Team Facilitator
P  Program and Staff Development Coord.
P  Assessment Specialist
P  Computer Lab Coordinator
P  Curriculum Coordinator
P  Education Reintegration Counselor
P  Fiscal Staff
P  Home Visitor
P  Teacher
P Teacher’s Assistant          P Technology Coordinator
P Volunteer Coordinator

S Administrative Assistant   S Bookkeeper
S Data Entry Staff          S Driver
S Early Childhood Assistant S Maintenance
S Office Manager            S Payroll Clerk
S Receptionist              S Security
S Support Staff             S Work Study/Intern

♦ The Direct staff plan will only show Direct hours. Match staff hours must be entered on the Match staff plan.

♦ The teacher/advisor code and class codes are transferred from the class plan which includes advising. The teaching/advising hours for all services taught by the same teacher/advisor are automatically calculated in the "Teaching" column. If all classes for a given teacher/advisor are deleted from the class plan, the teacher/advisor will automatically be deleted from the staff plan.

♦ If a staff person is paid different hourly rates for different duties, enter the staff person in multiple rows with the correct hourly rate and assigned duties.

♦ The teacher code and class code columns are to be left blank if staff are non-teaching members.

♦ The teaching hours for non-rate based classes are calculated by multiplying the class hours by the percentage of Direct Eligible Cost (Direct Eligible Cost divided by Total Cost).

♦ The box at the end of each row in the staff plan allows users to enter the agency definition for full-time for that position. This number represents the number of hours a person would work if full-time for the agency. Check with your fiscal office for this definition. The FTE’s for each staff member are automatically calculated by dividing the staff hours worked by the agency definition for full-time. Therefore, the user does not need to calculate them.

♦ A scroll bar keeps the header stationary while entering data in the various rows.

♦ You must select a value before the staff plan can be saved. The dropdown box indicates:

<table>
<thead>
<tr>
<th>Hours/Week</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2080</td>
<td>52 wks/yr * 40 hrs/wk</td>
</tr>
<tr>
<td>1950</td>
<td>52 wks/yr * 37.5 hrs/wk</td>
</tr>
<tr>
<td>1920</td>
<td>52 wks/yr * 35 hrs/wk</td>
</tr>
<tr>
<td>1827</td>
<td>52.2 wks/yr * 37.5 hrs/wk</td>
</tr>
<tr>
<td>1820</td>
<td>52 wks/yr * 35 hrs/wk</td>
</tr>
<tr>
<td>1800</td>
<td>50 wks/yr * 36 hrs/wk</td>
</tr>
<tr>
<td>1764</td>
<td>49 wks/yr * 36 hrs/wk</td>
</tr>
<tr>
<td>1705</td>
<td>44 wks/yr * 38.75 hrs/wk</td>
</tr>
<tr>
<td>1680</td>
<td>40 wks/yr * 42 hrs/wk</td>
</tr>
<tr>
<td>1600</td>
<td>40 wks/yr * 40 hrs/wk</td>
</tr>
<tr>
<td>1560</td>
<td>52 wks/yr * 30 hrs/wk</td>
</tr>
<tr>
<td>1470</td>
<td>42 wks/yr * 35 hrs/wk</td>
</tr>
<tr>
<td>1300</td>
<td>50 wks/yr * 26 hrs/wk</td>
</tr>
<tr>
<td>1260</td>
<td>36 wks/yr * 35 hrs/wk</td>
</tr>
<tr>
<td>1295</td>
<td>37 wks/yr * 35 hrs/wk</td>
</tr>
</tbody>
</table>

If the full time definition for your agency does not appear in the dropdown box, please select one that matches the closest total hours.

♦ The FTE calculated for each staff member will appear on the staff salary report.

♦ You may delete rows in any staff plans, if necessary. Only rows without classes and teachers can be deleted.
7 Agency Staff Salary Report – Direct Funding

The agency staff salary report lists all staff entered on the staff plan for all the projects at the agency. This report should assist agency directors when planning budgets for all the project grants. The report lists the project, staff title, staff name, hourly rate, fringe benefit rate, Direct hours, match hours, total hours, Direct salary and Direct loaded salary (includes benefits). A total column is provided for the hours and salary columns.

8 Project Staff Salary Report – Direct Funding

The project staff salary report lists all staff entered on the staff plan and sorts staff by the classification entered by the program - (A) Administrator, (P) Professional and (S) Support Staff. These classifications correspond to the line items 1-3 in the Direct budget detail pages. These reports will help programs develop their line item budget and budget narrative. The report lists classification, staff title, staff name, teacher code, hourly rate, fringe benefit rate, Direct hours, Direct salary, fringe amount and FTE for each staff person.

9 Summary Sheet – Direct Funding

The summary sheet summarizes the program plan for Direct funding and requires the user to enter the match for the grant. All figures are calculated from the class plan and Supplemental and Foundation Funding screen. The line labeled “GRAND TOTAL: REQUESTED FUNDING” must match your grant request.

10 Staff Plan – Match Funding

This plan captures staff hours allocated for match class hours. A scroll bar keeps the header stationary while entering data in the various rows. This will assist programs in calculating their match budget and narrative.

The Match Staff plan lists:

1) Teachers paid by matching funds only or a part of their salary is paid by matching funds (slots were assigned to Match in the class plan).
2) Staff who are paid only by matching funds.

11 Project Staff Salary Report – Match Funding

The project staff salary report lists all staff entered on the staff plan and sorts staff by the classification entered by the program - (A) Administrator, (P) Professional and (S) Support Staff. These classifications correspond to the line items 1-3 in the budget detail pages. These reports will help programs develop their line item budget and budget narrative. The report lists classification, staff title, staff name, hourly rate, fringe benefit rate, Match hours, Match salary, fringe amount and FTE for each staff person.

12 Summary Sheet – Match Funding

The summary sheet for Match is the same as the summary sheet for Direct Funding except that:

♦ The calculation for rate and non-rate based classes is based on Match slots, student hours, class hours and total cost.
13 Administrative Cost

The administrative cost screen is designed for the user to enter the administrative costs for each line item in the budget. The Department will NOT approve administrative costs that are higher than 25%. The user needs to read the reference materials that explain which costs are considered administrative.

- The first column lists budget line items that correlate to line items as they appear on the standard budget detail pages.
- The second column is read only and totals Column 3.
- The third column is data entry for the user to enter administrative costs for non rates class services for each appropriate line item. The total percent of funds used for administrative costs must not exceed 25%.
- The last column is data entry for administrative costs for supplemental and foundation administrative costs which does not apply for transitions.
- The total administrative costs for non rates class services are calculated.
- The total requested funds are automatically entered from the Total Direct funding line on the Direct Summary Sheet.
- The last row is automatically calculated by dividing the total administrative costs by the total requested funds.

14 Program Plan Status

The program plan status is a view only screen that shows the status of the program plan for the project. If you want to view the current plan or previous years’ plans, click on "Program Plan Status" to select the following:

- Current Year – Working, Approved or Archived Plans
- Plans From Previous Fiscal Years – select the year and the approved or archived versions

15 Request Funding

The request for funding screen requires users to check off the sections in the “Program Plan Checklist” that have been completed in order to submit the approval request.

- The first set of check boxes is required. Check all boxes even if they do not apply to your specific funded program.

<table>
<thead>
<tr>
<th>Program Plan Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click on the checkboxes below to indicate which components of the program plan have been completed and are to be submitted as part of this funding request.</td>
</tr>
<tr>
<td>☐ Class Plan</td>
</tr>
<tr>
<td>☐ Flex/Foundation Services Plan</td>
</tr>
<tr>
<td>☐ Summary Sheet - Direct</td>
</tr>
<tr>
<td>☐ Staff Plan - Direct</td>
</tr>
<tr>
<td>☐ Administrative Cost Worksheet</td>
</tr>
</tbody>
</table>

- Once the plan is submitted, the planning module will be locked for the readers to review.
- After the request has been submitted, the Program Plan Status screen will appear verifying that the plan has been submitted.