

**e-GAP**

**Final Expenditure Report (FER)**

**Documentation**

**Prepared by:**



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## Introduction

The Final Expenditure Report (FER) in e-GAP provides numerous pieces of functionality for school system and ALSDE users. School systems can document actual allocation transfers, report expenditures, and indicate the amount of allocation they wish to transfer into the subsequent fiscal year as carryover. ALSDE users can review FERs submitted by school systems knowing they have already passed numerous validations, request refunds from districts as necessary or appropriate, and approve FERs and carryover amounts. Approval of the FER automates numerous steps, including transfer of carryover funds, creation of accounting transactions to document movement of excess cash on hand, and creation of ES2s to pay school systems that have expended more funds than they have received.

## Getting Started

To work with FERs, a school system must first be selected. For some users, a system is already selected upon logging in. If a system name does not appear above the login name on the top right of the screen, use the following steps to select a system:

### Selecting a System

To select a system, click on "Search" from the left navigation.


The screenshot displays the e-GAP web application interface. At the top, there is a header bar with the e-GAP logo on the left and user information on the right: "Bill Instructor (Logout)" and "Session Timeout in 00:19:50". Below the header is a left navigation menu with icons and links for Home, Administration, Search, Document Library, Reports, Contact ALSDE, My Profile, and Help. The main content area is titled "Home" and contains two side-by-side boxes. The left box is titled "ANNOUNCEMENTS" and contains the text "No Announcements" followed by "No announcements exist in the system at this time." The right box is titled "REMINDERS" and contains the text "No Reminders" followed by "No reminders exist in the system at this time."

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## e-GAP FER Documentation

Use the form on the next page to look up the system. Enter search conditions, such as Name or County, to narrow the search; then click "Search." If no search conditions are entered, the search will return all systems.

From the results displayed, click on the system name to set the system for the application. Clicking on the "Planning" or "Funding" links for a system will set the system and redirect the user to that system's Improvement Planning or Funding Application sections, respectively.

GRANT ASSOCIATION PROGRAM

Bill Instructor [Logout]  
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Home > Search

Search

Search Organizations ▼

Organization Type: System ▼



Name: Begins With ▼ Ar

Number:

County: ▼

Search


There are 1 matching record(s). Displaying 1 through 1.

ORG CODE	ORGANIZATION NAME	COUNTY	PLANNING	FUNDING
106	<a href="#">Arab City</a>	Marshall County		


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## Working with the FER


To work with the FER, select "Funding Application" from the left navigation or from the center of the system home page:


**GRANT APPLICATION PROCESS**


ARAB CITY (106)  
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Session Timeout in 00:19:55


 [Home](#)


 [Administration](#)


 [Search](#)


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### Home

**Arab City**

**Improvement Planning**  
Need to modify your System Plan or a School Plan?


**Funding Application**  
Need to work on grant applications or claim funds?

**ANNOUNCEMENTS**  
**No Announcements**  
No announcements exist in the system at this time.

**REMINDERS**  
**No Reminders**  
No reminders exist in the system at this time.

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From the Funding Applications page, click the 'Final Expenditure Report' link in the 'Report' section.



**e-GAP**  
GRANT APPLICATION PROCESS

ARAB CITY (106)  
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[Home](#) > Funding Applications

## Funding Applications

2007 ▼

System Improvement Status: OK ▶

All Active Applications ▼

ENTITLEMENT FUNDING APPLICATION	REVISION	STATUS	STATUS DATE
<a href="#">Consolidated</a>	0	ALSDE Consolidated Federal Programs Director Final Approval	9/28/2006
<a href="#">EETT Formula Funds</a>	0	ALSDE EETT Formula Funds Coordinator Final Approval	11/7/2006
<a href="#">Safe and Drug-Free Schools and Communities</a>	0	ALSDE SDFSC Prevention/Support Section Coordinator Final Approval	11/7/2006
<a href="#">Special Education</a>	0	ALSDE Special Education Specialist Final Approval	10/4/2006
<a href="#">Career-Technical Education</a>	0	Draft Status Completed	8/18/2006

REPORT	STATUS	STATUS DATE
<a href="#">Final Expenditure Report</a>	Not Started	11/7/2006

**BUDGET ENTRY REVIEW**

[Budget Summaries](#)

**ES2S**

[Consolidated](#)

[EETT Formula Funds](#)

[Safe and Drug-Free Schools and Communities](#)

[Special Education](#)


[Career-Technical Education](#)

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## FER Sections Page











The resulting page displays the FER Sections. If the FER is not yet started, no sections will display. To get the sections to display, the FER must be moved into a status of Draft Started. It is important to note that the FER cannot be started until all pending funding application revisions and ES2s have moved into a finalized state. **Once the FER has been started, no further funding application revisions or user-generated ES2s will be allowed for that fiscal year.**

FER status changes can be made in the same manner as status changes on Funding Applications and ES2s.



**e-GAP**  
GRANT APPLICATION PROGRAM

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[Home](#) > [Funding Applications](#) > Final Expenditure Report Sections









### Final Expenditure Report Sections

Fiscal Year 2007

**Report Status:** Draft Started

**Change Status To:** [Draft Completed](#)

[View Status/Comments History Log](#)


SECTION	MESSAGES	PRINT
<b>Transfers</b>		
<a href="#">Actual Allocation Transfers</a>		
<b>Expenditures and Adjustments</b>		
<a href="#">Reported Expenditures</a>		
<a href="#">Expenditure Adjustments</a>		
<b>Refunds</b>		
<a href="#">Refunds Requested</a>		
<b>All</b>		

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The page should look familiar to e-GAP users. The top of the page contains a panel displaying the current status, possible next statuses, and a link to the Status/Comments History Log. The main panel of the page displays the main sections, links to pages in those sections, and Validation and Print links.

## Actual Allocation Transfers Page

The first page in the Final Expenditure Report deals with Actual Allocation Transfers. The page looks exactly like the Allocation Transferability page from the Funding Applications. The difference is that in this version, the user should report the Amount that ended up being transferred in actuality, as opposed to the proposed transfer amount from the Funding Applications. Actual Allocation Transfer amounts can be less than the proposed amounts from the Funding Applications; however, amounts greater than the proposed amounts will not pass validation.



GRANT APPLICATION PROCESS

ARAB CITY (106)  
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Home > Funding Applications > Final Expenditure Report Sections > Actual Allocation Transfers

### Actual Allocation Transfers

Arab City - Fiscal Year 2007 Final Expenditure Report

	TO I-SWP	TO I-TA	TO II-A	TO V	TO II-D	TO IV-A
<b>ALLOCATION</b>	\$269,274.00	\$0.00	\$78,292.00	\$4,604.00	\$2,835.00	\$8,404.00
<b>FROM I-SWP</b>	(\$245,000.00)	\$245,000.00				
<b>FROM II-A</b>	\$0.00			\$0.00	\$0.00	\$0.00
<b>FROM V</b>	\$0.00		\$0.00		\$0.00	\$0.00
<b>FROM II-D</b>	\$0.00		\$0.00	\$0.00		\$0.00
<b>FROM IV-A</b>	\$0.00		\$0.00	\$0.00	\$0.00	
<b>ADJUSTED ALLOCATION</b>	\$24,274.00	\$245,000.00	\$78,292.00	\$4,604.00	\$2,835.00	\$8,404.00


[< FER Sections](#)   [Save](#)   [FER Sections >](#)

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## Reported Expenditures Page


This page allows the user to report the amount that the organization expended utilizing funds from the listed grants.


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GRANT APPLICATION PROCESS


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**Reported Expenditures**

Arab City - Fiscal Year 2007 Final Expenditure Report

< FER Sections

Save

Expenditure Adjustments >

	AMOUNT
Title I, Schoolwide	0.00
Title I, Targeted Assistance	245,000.00
Title II-A, Improving Teacher Quality	72,175.00
Title V, Innovative Programs	4,250.00
Title II-D, Technology	2,600.00
Title IV-A, Safe and Drug-Free Schools	8,404.00
Special Education, Part B-IDEA	480,175.00
IDEA Preschool	11,525.00
Carl D. Perkins Secondary	0.00
Total	824,129.00

< FER Sections


Save

Expenditure Adjustments >

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## Expenditure Adjustments Page

The expenditure adjustments page calculates expenditures by original grant and allows the user to specify carryover intentions.



GRANT AFFILIATION SERVICES

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Home > Funding Applications > Final Expenditure Report Sections > Expenditure Adjustments

### Expenditure Adjustments

Arab City - Fiscal Year 2007 Final Expenditure Report

< Reported Expenditures
Save
FER Sections >

GRANT	ACTUAL ALLOCATION	ADJUSTED ALLOCATION	REPORTED EXPEND	ADJUSTED EXPEND	CASH RECEIVED	CASH UNEXPENDED	CARRYOVER AMOUNT	ACKNOWLEDGE CARRYOVER LESS THAN REMAINING
I-SWP	\$269,274.00	\$24,274.00	\$0.00	\$245,000.00	\$232,000.00	\$24,274.00	\$24,274.00	<input type="checkbox"/>
I-TA	\$0.00	\$245,000.00	\$245,000.00	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
II-A	\$78,292.00	\$78,292.00	\$72,175.00	\$72,175.00	\$75,000.00	\$6,117.00	\$6,117.00	<input type="checkbox"/>
V	\$4,604.00	\$4,604.00	\$4,250.00	\$4,250.00	\$4,604.00	\$354.00	\$354.00	<input type="checkbox"/>
II-D	\$2,835.00	\$2,835.00	\$2,600.00	\$2,600.00	\$2,600.00	\$235.00	\$235.00	<input type="checkbox"/>
IV-A	\$8,404.00	\$8,404.00	\$8,404.00	\$8,404.00	\$8,200.00	\$0.00	\$0.00	<input type="checkbox"/>
IDEA-B	\$480,197.00	\$480,197.00	\$480,175.00	\$480,175.00	\$480,197.00	\$22.00	\$0.00	<input type="checkbox"/>
IDEA-PRE	\$12,354.00	\$12,354.00	\$11,525.00	\$11,525.00	\$11,750.00	\$829.00	\$829.00	<input type="checkbox"/>
CDPS	\$15,817.00	\$15,817.00	\$0.00	\$0.00	\$0.00	\$15,817.00	\$15,817.00	<input type="checkbox"/>

< Reported Expenditures
Save
FER Sections >

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It is important to understand the meaning of all of the data columns on the page. A description of each follows:

**Actual Allocation** – This is the amount allocated to the organization by ALSDE.

**Adjusted Allocation** – This is the Actual Allocation amount plus or minus any actual transfers in or out of the grant as specified in the Actual Allocation Transfers screen.

**Reported Expend** – This is the reported expenditure amount from the previous page.

**Adjusted Expend** – This is the reported expenditure amount plus or minus any actual transfers in or out of the grant as specified in the Actual Allocation Transfers screen. An assumption in the FER is that funds transferred into that grant were expended first. As such, any actual transfer in reported on the FER will result in that transfer amount being subtracted from the Adjusted Expenditures of the grant to which it was transferred, and added to the Adjusted Expenditures of the grant from which it was transferred.

**Cash Received** – The total amount paid to the organization for the given grant for that fiscal year.


**Unexpended** – The difference between Actual Allocation and Reported Expenditures. This is generally the maximum carryover amount possible.

**Carryover Amount** – The user should specify in this field amount the organization wishes to carry over into the next fiscal year.


**Acknowledge Carryover Less Than Remaining** – If the organization does not wish to carry over the entire unexpended amount, this box must be checked to verify that this is the intended action as opposed to an oversight.


## Validation


FER Pages are validated in the same manner as Funding Applications and ES2s. Clicking the "Validate" icon on the Sections page will take the user to a list of any validation messages that exist in the page or pages that were validated. Clicking the validation message will take the user to the page on which the issue can be corrected.


**e-GAP**  
GRANT APPLICATION PRINCIPLES


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Home > [Funding Applications](#) > [Final Expenditure Report Sections](#) > Validation

Validation

Fiscal Year 2007

Expenditure Adjustments	TYPE
<b>MESSAGE</b> If the entire unexpended amount of \$22.00 for the Special Education, Part B-IDEA grant is not being carried over, the box must be checked to acknowledge that this is the intended action.	Error

[Return](#)

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### Workflow

FER workflow generally functions in the same manner as Funding Application and ES2 workflow. FERs must be approved by the School System Chief Financial Officer and Superintendent/Authorized Rep, the ALSDE Financial Support Accountant, and the ALSDE Assistant Superintendent. The ALSDE Assistant Superintendent step is somewhat different than what has been seen to date.

In addition to the ability to return the FER to the school system not approved, the ALSDE Assistant Superintendent has two approval options: Final Approved and Approved Pending Refund(s).

<b>Report Status:</b>	ALSDE Financial Support Accountant Approved
<b>Change Status To:</b>	<u>ALSDE Assistant Superintendent Final Approved</u> Or <u>ALSDE Assistant Superintendent Returned Not Approved</u> Or <u>ALSDE Assistant Superintendent Approved Pending Refund(s)</u>
<u><a href="#">View Status/Comments History Log</a></u>	

### ALSDE Assistant Superintendent Final Approved

The FER should be moved to this status if the reviewer is satisfied with all aspects of the FER, including the unexpended cash on hand with the school system. If possible, unexpended cash on hand will be moved into the carryover grant along with the carryover itself. The e-GAP system makes no discretionary determination relating to excessive cash on hand; if the carryover amount is at least equal to the amount of cash on hand, it will allow final approval of the FER.

The e-GAP system does, however, do some calculations to determine if a refund must be submitted to allow the system to process the FER from a mathematical standpoint. If a school system has more cash on hand for a given grant than it indicates it wishes to carry over for that grant, the system will prevent the FER from being moved into Final Approved status. The user will receive a message indicating that one or more refunds are necessary and to move the FER into the "Approved Pending Refund(s)" status:

<b>VERIFICATION</b>
The FER cannot be moved to the intended status because one or more refunds are necessary. Move the FER to the appropriate 'Pending Refund' status.
<input type="button" value="Cancel"/>

### ALSDE Assistant Superintendent Approved Pending Refund(s)

The FER should be moved to this status if the reviewer is satisfied with the actual allocation transfers, reported expenditures, and proposed carryover amounts, but either feels that some excessive cash on hand *should* be refunded, or the system indicates that some cash on hand *must* be refunded before moving into Final Approved status. Note that a user can move the FER into this status even if the system does not require him to.


Once in this status, the user can manage the requesting of refunds.

## Refunds Requested Page

Although this page is a part of the FER, it is not editable by school system users. This page allows the ALSDE user to indicate any refunds that must be submitted by the school system before ALSDE will approve the FER. Additionally, the system will list any refunds that it has determined must be submitted before the FER can be put into the Final Approval status.

If the system has determined that a refund must be submitted, the user cannot decrease the amount of the refund. He can, however, increase it, such that the school system must refund more than the e-GAP system determines to be the required amount. If a user requests a refund amount not required by the system, the "Refund Received" checkbox for that refund must be checked before the system will allow the user to move the FER into the Final Approved status. Before checking the box, the ALSDE user should await receipt and processing of the refund. He should then enter the appropriate refund transaction on the "Payments and Adjustments for Grant" screen in the ES2s portion of the application. Once this has occurred, he can check the box indicating that the refund has been received.

When moving an FER into the Pending Refund status, it is a good idea to notify the interested parties in the school system that refunds are being requested. The School System Chief Financial Officer and Superintendent/Authorized Rep will be notified via email that the status change has occurred; however, the e-GAP system will not notify the school system of which grants require refunds in what amounts.



**e-GAP**  
GRANT APPLICATION PROCESS

**ARAB CITY (106)**  
Bill Instructor [Logout]  
Session Timeout in 00:19:45

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### Refunds Requested

Arab City - Fiscal Year 2007 Final Expenditure Report

< FER Sections
Save
FER Sections >

GRANT	REQUESTED REFUND AMOUNT	REFUND RECEIVED
Title I, Schoolwide	0.00	<input type="checkbox"/>
Title I, Targeted Assistance	0.00	<input type="checkbox"/>
Title II-A, Improving Teacher Quality	0.00	<input type="checkbox"/>
Title V, Innovative Programs	0.00	<input type="checkbox"/>
Title II-D, Technology	0.00	<input type="checkbox"/>
Title IV-A, Safe and Drug-Free Schools	0.00	<input type="checkbox"/>
Special Education, Part B-IDEA	22.00	<input type="checkbox"/>
IDEA Preschool	0.00	<input type="checkbox"/>
Carl D. Perkins Secondary	0.00	<input type="checkbox"/>
<b>TOTAL</b>	<b>22.00</b>	

< FER Sections
Save
FER Sections >

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### Final Approval Actions

Final approval of the FER triggers a number of events, depending on individual circumstances. For each grant included in the FER, one or more of the following events may occur:

#### Creation of ES2 to Pay Outstanding Balance

If the adjusted expenditures for a grant are greater than the amount paid to that grant at the time of FER approval, the e-GAP system will generate an ES2 for that grant in the amount of the difference. The ES2 will be automatically moved through the school system's approval steps and will be awaiting the ALSDE Funds Management Accountant's approval.

#### Adjustment of Allocations

If the school system elected to carry over unspent funds, adjustments will be made to the allocation for the affected grant or grants. If the current-year grant is in a funding application that is currently in a public status, the funding application will be moved into a status of "Pending Post-FER Allocation Adjustments". This is a terminal status that does not allow future status changes. Its purpose is to allow grant allocation reductions without affecting the data of the most recently approved application. The allocations page on the affected funding application(s) will show negative allocation amounts in the Outgoing Carryover allocation row.

The subsequent fiscal year will have similar modifications. If the carryover-year grant is in a funding application that is currently in a public status, the funding application will be moved into the "Revision Started" status. The allocations page on the affected funding application(s) will show positive allocation amounts in the Incoming Carryover allocation row.

#### Transfer of Excess Cash on Hand

If the school system has a grant in which they were paid more than they expended and have opted to carry the remaining funds over, the system will create transactions to move the paid, unspent funds into the subsequent fiscal year with the carryover allocation of which it is a part. The ES2s screen for the original grant will show one or more negative transactions of type 'Automated Carryover Cash on Hand' that equal the amount of the cash on hand moved into the carryover grant's project. The corresponding screen for the carryover grant will show one or more positive transactions of type 'Automated Carryover Cash on Hand' in amounts offsetting the original grant's amounts.

## Searching FERs

e-GAP provides a convenient method to find FERs that is quicker than navigating through individual school systems to view the FER.

To search for FERs, click "Search" from the left navigation. Select "Search FERs" from the search type dropdown list on the resulting page to see the following screen. Once the search criteria have been entered, click "Search". The results will be displayed below the search area. Go to the organization's FER Sections page by clicking on an organization name from the results list.

[Bill Instructor \[Logout\]](#)  
 Session Timeout in 00:19:50

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[Home](#) > [Search](#)

### Search

Search FERs ▼

Organization Type: System ▼

Name: Begins With ▼

Number:

County: All ▼

Fiscal Year: 2007 ▼

FER Status: All ▼  
Draft Started  
Draft Completed  
School System Chief Financial Officer Approved

FER Contact: All ▼

[Search](#)

**RESULTS TOOLS**

Sort By Organization Name ▼     [Bulk Email](#)     [Download Data](#)

There are **1** matching record(s). Displaying **1** through **1**.

NUMBER	ORGANIZATION NAME	COUNTY	ALSDE CONTACT	STATUS	STATUS DATE
106	<a href="#">Arab City</a>	Marshall County	Cynthia Appling	ALSDE Assistant Superintendent Final Approved	11/13/2006

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### Example Search – ALSDE Financial Support Accountant Approval

One common task that can be performed with the search feature is to find all FERs that are awaiting ALSDE Financial Support Accountant approval for a specific person. Since an ALSDE Financial Support Accountant may have many pending FERs from several systems, it would be tedious to go through the process of selecting each individual system and navigating to its FERs to view and approve them. The search feature provides an easy way around this problem.


Before continuing with the example, ensure that an ALSDE Financial Support Accountant contact is specified for the system that is being used. To specify this contact, refer to [Specifying a Contact Type for a System](#).

To find all FERs that are awaiting ALSDE Financial Support Accountant approval for a specific contact, use the following search parameters:


1. Select the current fiscal year for **Fiscal Year**.
2. Select the "School System Superintendent/Authorized Rep Approved" option in the **Status** list.
3. Select the **FER Contact** that is specified as the ALSDE Financial Support Accountant for the system.
4. Click the "Search" button.





The search results list the FERs that are awaiting the approval of the ALSDE Financial Support Accountant. The screen should look similar to that shown below:


  
GRANT APPLICATION (S200611)


ARAB CITY (106)  
Bill Instructor [Logout]  
Session Timeout in 00:19:45


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### Search

Search FERs

Organization Type: System

Name: Begins With

Number:

County: All

Fiscal Year: 2007

FER Status: School System Chief Financial Officer Returned Not Approved  
School System Superintendent/Authorized Rep Approved  
School System Superintendent/Authorized Rep Returned Not Approved  
ALSDE Financial Support Accountant Approved

FER Contact: Cynthia Appling

Search

RESULTS TOOLS

Sort By Organization Name Bulk Email Download Data

There are 1 matching record(s). Displaying 1 through 1.

NUMBER	ORGANIZATION NAME	COUNTY	ALSDE CONTACT	STATUS	STATUS DATE
106	Arab City	Marshall County	Cynthia Appling	School System Superintendent/Authorized Rep Approved	11/10/2006

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## Specifying a Contact Type for a System

To specify a contact type for a school system, first select a school system. Once a system has been selected, click on "Address Book" from the left navigation:

**e-GAP**  
GRANT APPLICATION PROCESS

ARAB CITY (106)  
Bill Instructor [Logout]  
Session Timeout in 00:19:55

**Home**

**Arab City**

**Improvement Planning**  
Need to modify your System Plan or a School Plan?


**Funding Application**  
Need to work on grant applications or claim funds?

**ANNOUNCEMENTS**  
**No Announcements**  
No announcements exist in the system at this time.

**REMINDERS**  
**No Reminders**  
No reminders exist in the system at this time.

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On the Address Book page, click on the Contact Type to create a new contact for that type:



ARAB CITY (106)  
Bill Instructor [Logout](#)  
Session Timeout in 00:19:00

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[Address Book](#)  
[Document Library](#)  
[Contact ALSDE](#)  
[My Profile](#)  
[Help](#)

[Home](#) > [Address Book](#)  
**Address Book**  
[Return](#)  
[View All System Users](#)

CONTACT TYPE	CONTACT
School System Superintendent/Authorized Rep	<a href="#">John Mullins</a> <a href="#">John Mullins</a>
School System Chief Financial Officer	<a href="#">Donna Tidmore</a>
ALSDE Funds Management Accountant	<a href="#">Beverly Gray</a> 
<u>ALSDE Financial Support Accountant</u>	Not Specified
ALSDE Assistant Superintendent	<a href="#">Craig Pouncey</a> 

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The resulting page lists the names of the contacts available for the selected contact type. Only those users with the specific permissions associated with that contact type are available in the list. Select a name from the list and click "Save" to finish specifying a contact type for a system.

**Create Contact**

Cynthia Appling ▼

Save

Cancel