



STANDARD OPERATING PROCEDURES (SOP) FOR GFMIS GRANTS 3.0 UAT/TRAINING

SOP 1: Adding a New Subrecipient

1. Login as authorized user
2. Navigate to Grants > Subrecipient Grants.
3. (Overview Tab) Enter a value into the **Name** and **Description** Fields***.
4. Click New Subrecipient (bottom of screen).
5. Click Subrecipient Details Tab
6. Fill in Organization and Contact Details.
 - a. Fields to Fill in:
 - Subrecipient Name
 - UEI #
 - Encumbrance #
 - Disbursement Method
 - Contractual Agreement
 - Status
 - Program Contact
 - Program Phone
 - Program Email
 - Financial Contact
 - Financial Phone
 - Financial Email
 - Project Description
 - Name
 - Address
 - City
 - State
 - Zip Code
 - Contact Phone
 - Contact Email
 - Organization
 - Bank Name
 - Routing Number
 - Account Number
7. **Save.**
8. Click the **Submit** button and select **Approve**, then click **Confirm** button.
9. Navigate to main menu page, click Grants > Subrecipient Grants.

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10. Verify New Subrecipient by Navigating back to Subrecipient Grants.
11. Locate your New Subrecipient.
12. To see the Details, use **Run Row Action**, then click on **Details** tab.
13. Task Completed.

TIP's	<i>In the subrecipient grant management grid, you can click the column heading and sort the data by the column heading.... e.g. clicking Name sorts the subrecipients by name.</i>
	<i>*** (Overview Tab) Name and description in the overview tab are simply documentation before you press the submit button. It is used in the audit log to keep track of the permanent changes to the database. This can be performed in the beginning or end. If it is done in the beginning, you won't forget to do it after the task is completed. easier to explain your description field and create a document name.</i>
	<i>use the filter icon to quickly search for the subrecipient you want to view or change.</i>
	<i>if you hover over the grant tab, you will see menu options that include subrecipient grant, invoices, and grant expenditures.</i>