

TCE Grant Award Notification Required Actions and Other Information

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Required Actions

In order to properly establish your grant account, the Grant Program Office requires your organization to take the following actions. Return the completed forms, revised program plan and budget revisions within **20 calendar days from the date of grant notification**.

Please retain a copy of all documents for your records. The preferred method for communicating with the Grant Program Office is via e-mail. The e-mail address of your assigned grant officer is provided in the letter announcing the award.

Failure to return the requested information by the due date or receive an **approved** exception **will result** in non-consideration for future grant opportunities.

Any questions should be directed to your assigned grant officer.

Item	Actions	Method	Due
1	Form 9661, Cooperative Agreement Review the Form 9661, <i>Cooperative Agreement</i> , with Publication 5245, <i>TCE Terms and Conditions</i> and Grant Reporting Requirements. Confirm the number of projected returns. Any change to projected returns must be approved by the Chief, Grant Program Office prior to grant acceptance. Sign the Form 9661.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
2	Form 13533, Sponsor Agreement Review Publication 4299, <i>Privacy and Confidentiality - A Public Trust</i> . You must become familiar with the safety and security requirements contained in this publication. Complete and sign Form 13533, Sponsor Agreement.	E-mail to your Territory Office	20 calendar days from date of grant notification
3	Program/Budget Plan Revisions Review and revise your <i>Program/Budget Plan Narrative</i> if significant changes are required due to the reduction in funds. Please <u>do not rewrite</u> your narrative but provide a summary list of the changes.	E-mail to your assigned grant officer	20 calendar days from date of grant notification
4	Form 8653, Application Plan Revisions Revise your Form 8653, <i>Application Plan</i> to identify line items changes due to the reduction in funds.	E-mail to your assigned grant officer	20 calendar days from date of grant notification

Item	Actions	Method	Due
5	<p>Standard Form 1199A, Direct Deposit Sign-up Form</p> <p>Complete recipient portion of the Standard Form 1199A, <i>Direct Deposit Sign-up Form</i>, and have your financial establishment complete their portion. The form will be uploaded to Payment Management Services (PMS) for account establishment. Due to the problems experienced in completing this form correctly, line-by-line instructions are on the PMS website (https://pms.psc.gov) for grantees to complete the form properly. If you are a previous TCE Grant recipient, you are <u>only</u> required to submit a SF 1199A if information has changed since your previous submission. Save Form 1199A as a PDF before uploading it to PMS.</p>	<p>Original signatures ONLY!!!</p> <p>Forms <u>must</u> be uploaded to the PMS. See the PMS liaison contact information below.</p>	<p>20 calendar days from date of grant notification</p>
6	<p>Payment Management System Access</p> <p>New users must request access to the Payment Management System by completing the on-line Request Access to PMS found under Grant Recipients on the PMS website (https://pms.psc.gov)</p>	<p>On-line PMS website</p>	<p>20 calendar days from date of grant notification</p>
7	<p>Primary Contact Form Revisions</p> <p>Complete Contact Form - This Contact Form is ONLY required if changes have occurred since the application was submitted. If no changes are required to the form submitted with the application, an e-mail notifying the grant officer that this is the case is sufficient.</p>	<p>E-mail to your assigned grant officer</p>	<p>20 calendar days from date of grant notification</p>
8	<p>Site Information</p> <p>Provide a listing of sites established for this program period. Be sure to include site location, SIDN and EFIN. If no changes are required to the list submitted with the application, an e-mail notifying the grant officer that this is the case is sufficient.</p>	<p>E-mail to your assigned grant officer AND to Territory Office via Form 13715, <i>Volunteer Site Information Sheet</i></p>	<p>January 15</p>

Other Information

Payment Management System (PMS) Account Establishment

The IRS will authorize Payment Management Services (PMS) to release grant funds after all required documents and forms are received, approved and processed. It normally takes 1-2 weeks for PMS to establish your account. The primary contact person will receive an e-mail from PMS providing the electronic login and password to access and withdraw funds using the Payment Management System (PMS) at <https://pms.psc.gov>. It is our intent to have all documented funds available by mid-January; however, the receipt and processing of all required forms, the PMS workload and the passage of the Congressional budget appropriating funding for the TCE Program will dictate whether this is achievable. We will notify your organization when the account is established.

For general questions about PMS payments, access requests, or banking information contact the PMS liaison at:

Ms. Kathleen Vardon
Accountant, Governmental & Tribal Payments Branch
Payment Management Services
Program Support Center
U.S. Department of Health and Human Services
7700 Wisconsin Ave., Suite 10330C
Bethesda, MD 20857
Office: (301) 492-5011
Fax: (301) 492-4511
E-mail: Kathleen.Vardon@psc.hhs.gov

Additional instructions for completion of the SF 1199A and PMS Access follow.

Completion of DPM Payment Management System Access

All recipients must complete the on-line Payment Management System Request Access. Refer to the PMS Website (<https://pms.psc.gov>) under **Grant Recipients – Request Access to PMS**.

Note: If multiple individuals are responsible for quarterly report submission or payment requests, separate requests must be completed and submitted on-line for each individual. Refer to the PMS website (<https://pms.psc.gov>) and follow the same instructions in the above paragraph to request access.

Completion of Standard Form (SF) 1199A, *Direct Deposit Sign-Up Form*

Refer to the PMS Website (<https://psc.pms.gov>) – **Grant Recipients – Add or Change Bank** for banking information instructions to complete the SF 1199A and avoid re-work. The form must be completed with original signatures and uploaded as a PDF file on the PMS Website. Recipients that are not previous TCE Grant recipients must complete the SF 1199A.

Note: If you are a previous TCE Grant recipient and your information changed (name, address, account number, financial institution), you must submit a SF 1199A with the revised information on-line at the PMS Website. Be sure to get all original signatures on the form and upload it to the PMS website as a PDF file.

Additional Resources

You may find the following documents on www.irs.gov.

- Publication 4883, *Grant Programs Resource Guide*
- Publication 1101, *Application Package & Guidelines for Managing a TCE Program*
- Publication 1084, *IRS Volunteer Site Coordinator's Handbook*
- Form 13614-C, *Intake/Interview & Quality Review Sheet*
- Publication 4299, *Privacy and Confidentiality – A Public Trust*