Minnesota Department of Education

SERVS Financial Access Authorization Instructions

The following information is extremely critical to using SERVS Financial. For clarification purposes the IDENTIFIED OFFICIAL WITH AUTHORITY is the person who has legal authority to sign legal documents on behalf of the organization considered the agency head.

A. **For a school district - it must be the Superintendent**
B. **For an organization/agency - it must be the Executive Director/Board Chair**

The Superintendent or Executive Director/Board Chair (agency head) must represent the organization in three different areas:

1. They must electronically sign the application as part of the application submission process.
2. They must identify self as **Approve Application and Budget** user per the *SERVS Financial Access Authorization* document.
3. They must certify authorized user roles and also sign the *SERVS Financial Access Authorization* document.

   The agency head needs to assign and approve user roles for *any* person using the Minnesota Department of Education (MDE) SERVS Financial on behalf of the organization. Any person expected to use SERVS Financial should be included on the authorization document. Please identify under the column *Authorized User* the appropriate staff in your organization that should have access and the level of access to be granted. **As each person can only be assigned one of the four roles please assign staff accordingly** and provide their full name, title and role assignment. You can add or reduce the number of staff per role.

There are four (4) different access Authorized User type roles (plus an optional role):

1) **Approve Application and Budget**: Approver (Read/Write in grant and budget, Approve grant submission and Read in checkbook *(role of official with legal authority, see A or B above)*

2) **Application and Budget:** Read/Write in grant and budget and Read in checkbook *(Enter grant application and budget and view the budget)*

3) **Account Register/Request Draws:** Read grant and budget and Read/Write in register/checkbook to draw funds (*role of Business Office)*

4) **View All (Read only):** No write permission

5) **Review Competitive Grants (optional):** Grant Review Team member as requested by MDE.

The agency head will need to follow the instructions below to submit the *SERVS Financial Access Authorization* document. If approved, the user can then set up their user id and password in order to access SERVS Financial. **(One role per individual)**.

Newly authorized persons with an established user id and password in another MDE program will use the same user id and password to access SERVS Financial. If you have moved from one district/school to another, you will modify your account information to reflect your new school. Do not create a new MDE account unless you do not have an MDE account established.

Denials

Denials or non-approval status could be due to: failure to follow the instructions, unclear or duplicate assignments of roles or form was not signed by legal authority (agency head). If a staff is denied access/approval, please check the non-approved list and submit a revised form. You may find the list at: SERVS Financial Home Page

SUBMISSION OF AUTHORIZATION DOCUMENT:
Send the completed and signed form by e-mail to: MDE.ServsFinancial@state.mn.us in order to start the process.

Once you have submitted to the document to MDE:

- Notify staff that they have been designated a specific role as an *Authorized User* in SERVS Financial. *Authorized Users* must log-in to SERVS Financial on the MDE Web site at: SERVS Financial Home Page - scroll down to SERVS to request access for the specific role, and then log out.
- MDE will approve access requests in the order received.
- If you have already submitted a form that has duplicate roles for individuals identified, they will be assigned the highest level indicated or we will deny the request. (see denial section above)
- For questions please send an e-mail to: MDE.ServsFinancial@state.mn.us or contact the SERVS Financial helpline at 651-582-8500.

Send electronically signed form via e-mail to: MDE.ServsFinancial@state.mn.us directly from the appointed authority for the school (superintendent/director, Executive Director, or if a non-public school, head of school). If you do not have an electronic signature, the appointed authority for the school will type name on the signature line, date and save to desktop where it can be easily located. This form MUST be returned directly from the appointed authority's email address. Forms received as forwards from anyone other than the appointed authority, scanned copies, or mailed (USPS) will be rejected. Track changes must be visible. Do not accept changes. Do not mark the document as "Final" in track changes; if the identity of insertion of the name is not visible the document will be rejected.

Please send questions to the above email address or contact 651-582-8500.

Please use the list below to identify the role to assign.

REVIEW SERVS FINANCIAL ROLES **(One role per individual)**
APPROVE APPLICATION AND BUDGET This role is **reserved for the person(s) who have legal authority to sign on behalf of the organization.** This role will approve grant applications on behalf of the organization to be reviewed and considered for award by MDE.
APPLICATION AND BUDGET This role **is reserved for program area staff that will submit grant applications and budget narratives** for their program and work with their business office staff to prepare and enter corresponding budgets. This role can submit applications and prepare draft budgets.
ACCOUNT REGISTER This role should be **reserved for Business Office staff** responsible for cash management reimbursement of federal expenditures. This role can request fund reimbursement (make draw requests) for organizations. This role can also submit applications and prepare draft budgets but budgets must be approved by agency head.

REVIEW SERVS FINANCIAL ROLES **(One role per individual)**
VIEW ALL - READ ONLY This role is reserved for **any program area staff** responsible to review or track applications and budgets as they progress over the year. This role can **"view"** all budgets and applications but **cannot** submit, approve or request reimbursements.
REVIEW COMPETITIVE GRANTS (OPTIONAL) These staff have been invited by MDE or elected to be part of the grant review team by reviewing and commenting on a specific competitive grant application.