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State of Illinois Centralized Indirect Cost Rate Negotiation System – ICRP & FRMI

Powered by the Crowe Review & Monitoring Platform (CRMP)

Grantee & Cognizant Agency Training Manual

December 2023



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I. Introduction and Overview

The purpose of this document is to provide a training manual for the two primary end user groups of the Crowe Review & Monitoring Platform (CRMP) – Grantees and Cognizant Agencies. The primary purpose of this document is not to explain the indirect cost rate proposal process or explain indirect cost rate detailed concepts/terms. Resources on indirect cost rate proposal subject matter can be found at the State of Illinois' Grant Accountability and Transparency Act (GATA) website at <https://gata.illinois.gov>.

Grantees are defined as entities who receive or will receive State or Federal pass-through funding from the State of Illinois.

Cognizant Agencies are defined as the State of Illinois Agencies responsible for providing final acceptance of submitted Grantee indirect cost rate proposals.

Each Grantee is expected to complete the indirect cost rate proposal process **every fiscal year**, based upon Grantee fiscal year-end (not State of Illinois fiscal year-end). The Grantee will select their indirect cost rate election within the State of Illinois GATA Grantee Portal (GATA Grantee Portal) (<https://grants.illinois.gov/portal/>). For additional information on the GATA Indirect Cost Rate Election Process, see the GATA ICR Election Process Manual at <https://gata.illinois.gov/indirect-cost1.html>.

This training manual is broken up into two major sections. The first section covers all aspects of CRMP from the perspective of a Grantee, while the second section covers all aspects of CRMP from the perspective of a Cognizant Agency. In addition, there is the Other Information section, which includes guidance over frequent questions related to the process.

Should any user ever need assistance while using the CRMP application, contact the support line at either 1-800-599-9110 or GOMBSupport@crowe.com.

II. Grantee

1. Invitation to CRMP

CRMP is utilized by Grantees to submit indirect cost rate proposals to the State of Illinois. When a Grantee selects either a State Negotiated Indirect Cost Rate Agreement (NICRA) election or a Federal Rate Maintained Internally (FRMI) within the GATA Grantee Portal, **an invitation to the CRMP system will be sent to the Grantee via email**. The invitation will contain instructions on how to login using Okta and access the Grantee's unique survey in the CRMP Portal. This invitation will be sent each year with a unique survey for completion.

See the next page for an example of the email invitation.

As the sender's email inbox for the email is not monitored, please do not reply directly. The email account for support/assistance is GOMBSupport@crowe.com.

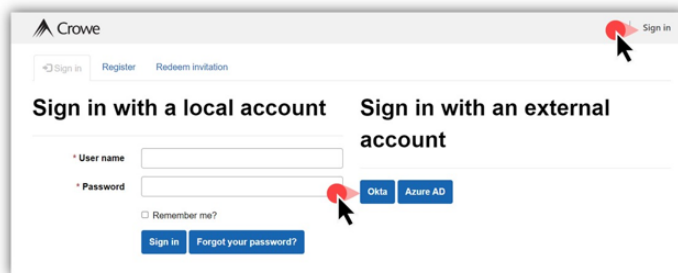
Subject State of Illinois Cost Rate Proposal (ICRP) - To be completed

Invitation

Welcome to the State of Illinois Indirect Cost Rate Proposal (ICRP) process. Your organization has elected to submit an ICRP for approval or monitoring through the State of Illinois Centralized Indirect Cost Rate Election System. Please note that the CARS system will sunset in December 2023. Moving forward, all ICRP negotiations will be handled by a new Centralized Indirect Cost Rate Negotiation System, which is powered by the Crowe Review & Monitoring Platform (CRMP).

Follow the steps below to access your Indirect Cost Rate Negotiation Survey. If you have any questions regarding the login process, contact GOMBSupport@crowe.com.

Step 1: Login to the CRMP Survey Portal [here](#) by clicking Sign in, then the Okta button.



For first-time sign in only, utilize the temporary password below. After first time sign-in you will be asked to create a new password and set up multifactor authentication.

- **Username** = your email address
- **Temporary password** (case sensitive) = Gomb@123

Step 2: After signing in to the CRMP Portal, navigate to “My Surveys” or click [here](#) to open the survey specific to your organization’s ICRP within CRMP. Note: It will take a minute for the survey to fully load the appropriate pages for your election. Complete the survey in order to negotiate a rate. Once the survey is submitted a Reviewer will evaluate your submission.

For assistance on setting up your account, navigating the application, and submitting your survey, reference guidance materials, including a CRMP user manual, on the GATU website [here](#).

Annual ICRP Submission Requirements

An organization which has not previously established an Indirect Cost Rate with the State of Illinois must submit its initial Indirect Cost Rate Proposal (ICRP) immediately after the organization receives notice a State of Illinois award will be made and, in no event, later than (3) months after the effective date of the State award.

Organizations that have previously established indirect cost rates with the State of Illinois must submit a new indirect cost rate proposal annually within (6) months after the close of the organization’s fiscal year end.

Assistance

For technical assistance related to your organization’s Indirect Cost Rate Proposal (ICRP), please contact your State Cognizant Agency. State Cognizant Agency contact info can be found within the [Grantee Portal](#).

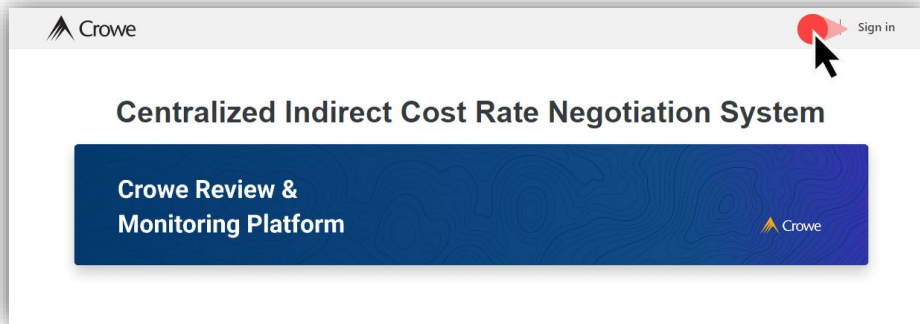
For assistance related to accessing or navigating the CRMP application, please contact Crowe LLP at GOMBSupport@crowe.com or 1-800-599-9110.

For individuals with disabilities according to the Illinois Information Technology Accessibility Act (IITAA), Public Act 095-0307, please contact the GOMB support line at 888-241-9426 or OMB.GATA@illinois.gov

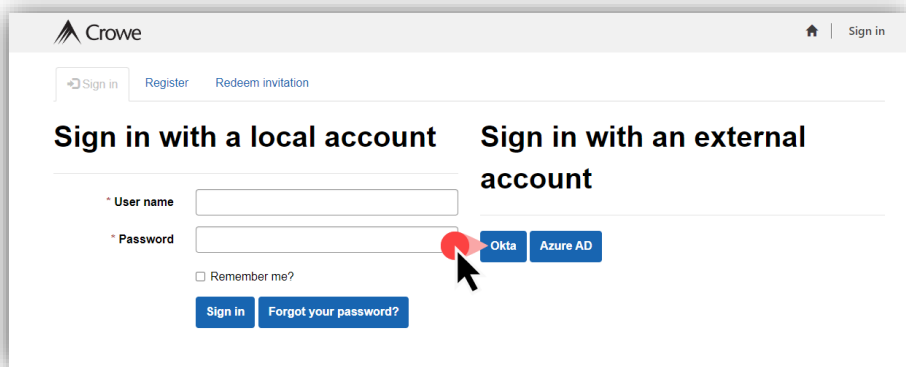
2. Logging into CRMP for the first time

1. Grantees can login to CRMP directly from the link in the invitation email or directly at the website URL: <https://crmpgomb.powerappsportals.com>

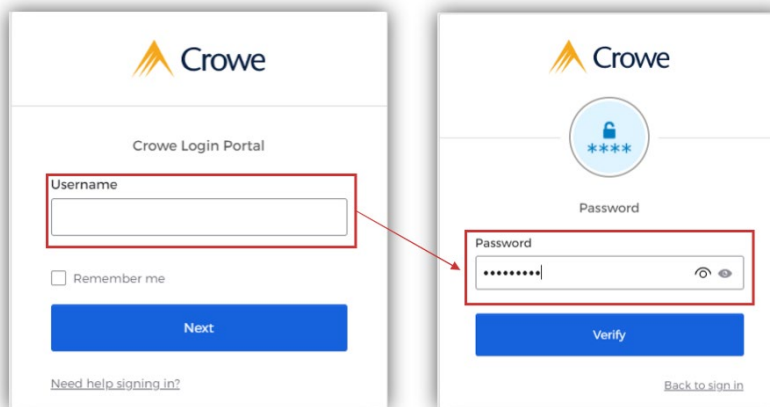
Click the **Sign in** button in the top-right hand corner of the page.



Then, click the **Okta** button under the Sign in with an external account section.



Enter username (email address) and the temporary password (Gomb@123) listed in the invitation email.



After logging in with the temporary password, users will be asked to create a new password and setup multifactor authentication.

Crowe

Your Okta password has expired

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Password can't be the same as your last 24 passwords

Old password

New password

Repeat password

Change Password

[Sign Out](#)

Crowe

Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

- Okta Verify**
Use a push notification sent to the mobile app.
[Setup](#)
- Google Authenticator**
Enter single-use code from the mobile app.
[Setup](#)
- SMS Authentication**
Enter a single-use code sent to your mobile phone.
[Setup](#)
- Email Authentication**
Enter a verification code sent to your email.
[Setup](#)

Logged in users should be able to navigate to the CRMP homepage, with their name appearing in the top-right hand corner (where the Sign in option displayed previously).

Crowe | [Home](#) | [My Surveys](#) | [Review Comments](#) | [Annie Bedalov](#)

Centralized Indirect Cost Rate Negotiation System

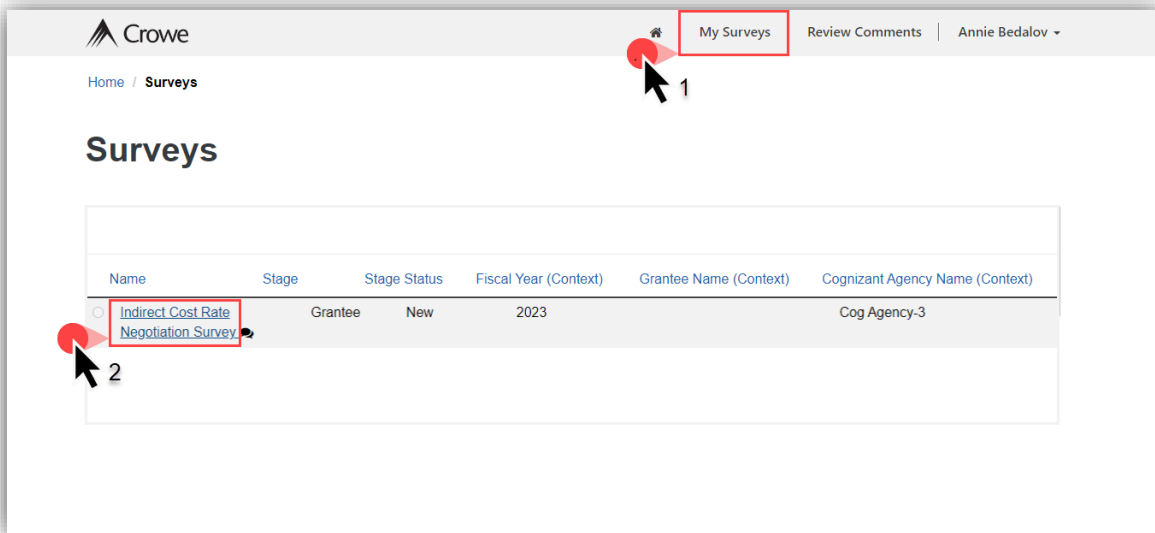
Crowe Review & Monitoring Platform

Crowe

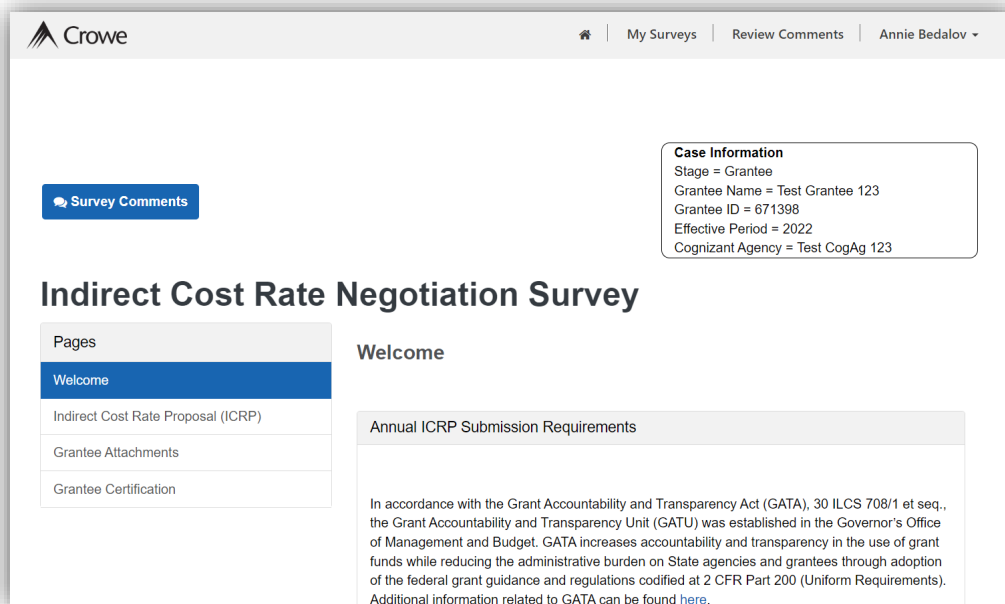
3. Indirect Cost Rate Negotiation Survey Completion

1. Opening a Survey

- a. If a Grantee navigates **directly to the CRMP URL** (<https://crmpgomb.powerappsportals.com/>) they can navigate to their survey by:
 1. First, clicking on **My Surveys** in the gray bar on the top of the page. Here the Grantee will see all active surveys related to their user, including prior completed surveys.
 2. Second, click on the **Name** of the survey to open it.

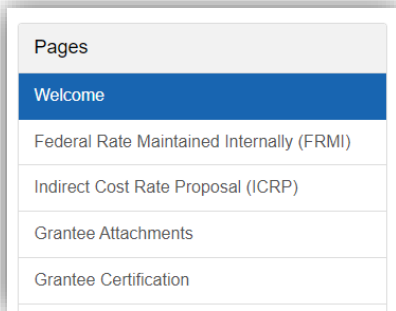


- b. If a Grantee has already logged into CRMP, they can use the link in the CRMP welcome email (see page 3) to **navigate directly to their survey**.



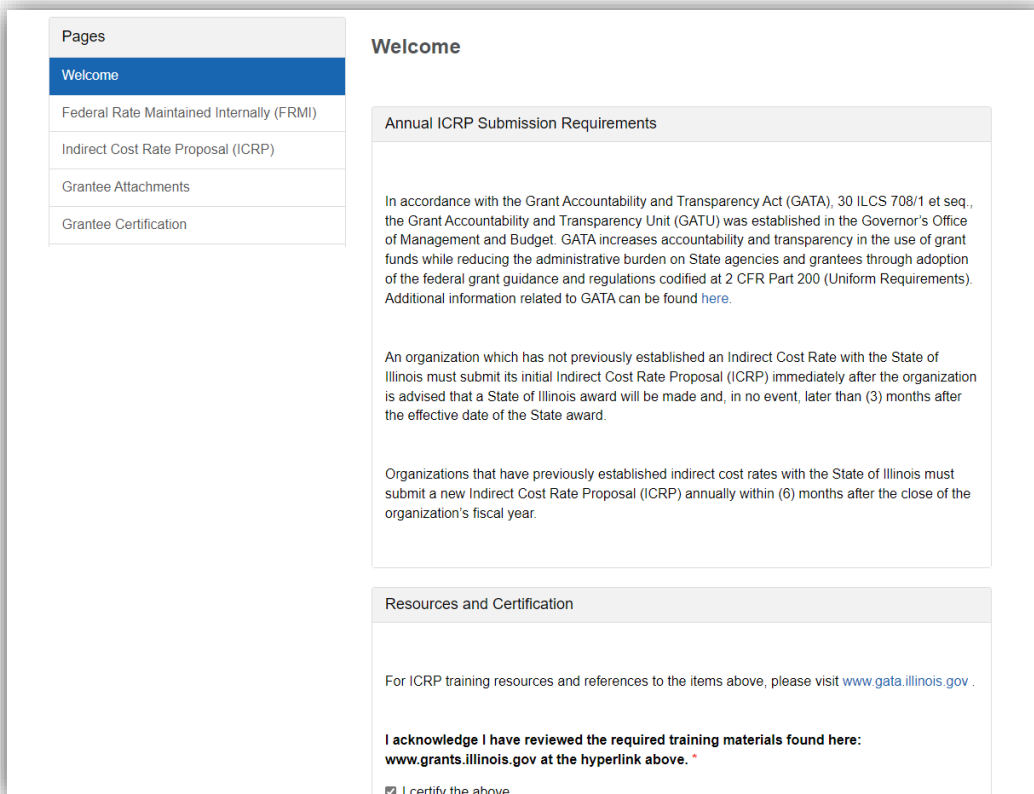
2. Survey Content

The Indirect Cost Rate Negotiation Survey contains all required questions to complete and submit the ICRP or FRMI. The questions are organized into pages on the left-hand side of the screen. Users can toggle between pages here at any point in the survey (work is saved on page change). Note: Pages showing will be dependent upon the type of negotiation elected.



Welcome Page

This page provides guidance over the proposal process, links to the GATA Grantee Portal, training materials and other relevant information as well as submission requirements. The Grantee must acknowledge their review of the training materials located on the GATA website before submitting in CRMP.



Indirect Cost Rate Proposal (ICRP) Page

This page will only appear if you are completing an indirect cost rate proposal for your organization (else, it will be the Federal Rate Maintained Internally page). You will need to answer all questions populated. Several additional questions will appear for each additional rate (up to 5).

Pages	<h4 style="text-align: center;">Indirect Cost Rate Proposal (ICRP)</h4> <div style="background-color: #f2f2f2; padding: 5px;">ICRP Questionnaire</div> <p>Please indicate agreement with the below certifications by checking the certification box. Below the certifications, please answer the additional rate questions.</p> <p>Our organization has documentation available for review that supports the time estimates for personnel costs allocated among direct/indirect functions as included in the ICRP. *</p> <p><input checked="" type="checkbox"/> I certify the above</p> <p>We have an established accounting system that provides adequate internal controls to safeguard assets, ensure fund accountability by cost category, assure accounting data accuracy and reliability, promote operating efficiency, and comply with regulatory requirements and accounting procedures. *</p> <p><input checked="" type="checkbox"/> I certify the above</p> <p>Was the Indirect Cost Rate Proposal (ICRP) prepared internally or by an external party?</p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">Externally ▼</div>
Welcome	
Indirect Cost Rate Proposal (ICRP)	
Grantee Attachments	
Grantee Certification	

Federal Rate Maintained Internally (FRMI) Page

This page will only appear if you are completing a FRMI submission for your organization (else, it will be the Indirect Cost Rate Proposal page). You will need to answer all questions populated. Several additional questions will appear for each additional rate (up to 5).

Pages	<h4 style="text-align: center;">Federal Rate Maintained Internally (FRMI)</h4> <div style="background-color: #f2f2f2; padding: 5px;">FRMI Questionnaire</div> <p>Please indicate agreement with the below certifications by checking the certification box. Below the certifications, please answer the additional rate questions.</p> <p>Our organization has documentation available for review that supports the time estimates for personnel costs allocated among direct/indirect functions as included in the ICRP. *</p> <p><input checked="" type="checkbox"/> I certify the above</p> <p>We have an established accounting system that provides adequate internal controls to safeguard assets, ensure fund accountability by cost category, assure accounting data accuracy and reliability, promote operating efficiency, and comply with regulatory requirements and accounting procedures. *</p> <p><input checked="" type="checkbox"/> I certify the above</p>
Welcome	
Federal Rate Maintained Internally (FRMI)	
Grantee Attachments	
Grantee Certification	

Attachments page

The specific attachments requested vary depending on election, ICRP or FRMI; however, the concept is the same. Click on each of the paperclip icons to attach the requested document(s). Be sure a pop-up blocker is not enabled on your web browser.

For details on attaching documents, see the “How do I attach documents?” section on page 36.

Pages

- Welcome
- Federal Rate Maintained Internally (FRMI)
- Indirect Cost Rate Proposal (ICRP)
- Grantee Attachments**
- Grantee Certification

Grantee Attachments

Requested Attachments

Attach Audit Report (including Single Audit if applicable). Please utilize data from two years prior to complete your submission for negotiations (for example, use FY22 data for FY24 submission). The use of data from two years prior will need to be used consistently in future proposals to ensure appropriate rate finalization

Attach Reconciliation – Spreadsheet and other documentation to provide a walkthrough from indirect cost rate proposal to the audited financial statements (broken down by program name and program type (federal, state, other)).

Certification page

The organization is required to read and certify each statement listed as it relates to the indirect cost rate election.

Pages

- Welcome
- Federal Rate Maintained Internally (FRMI)
- Indirect Cost Rate Proposal (ICRP)
- Grantee Attachments
- Grantee Certification**

Grantee Certification

Grantee Certification

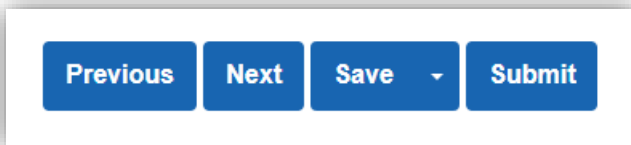
By submitting this proposal, I certify to the best of my knowledge and belief that the proposal is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise.

I certify the above

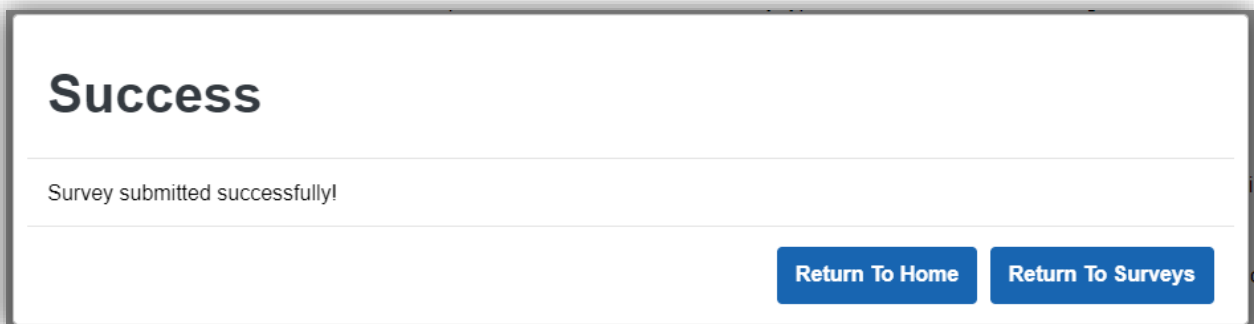
Title:

3. Survey Submission

After the organization has responded to all required questions on the previous pages and attached all necessary documents, the survey can be submitted. At the bottom of each page there are four navigation buttons. Clicking the Previous, Next, or Save buttons will save survey progress. Clicking **Submit** will submit all survey responses to the Reviewer.



If the survey is submitted successfully, a message will appear on-screen. Grantees can now select to Return to Home, Return to Surveys, or can exit out of CRMP entirely by logging out or closing the browser tab.



4. Grantee Review

Survey review comments and rework

After the ICRP or FRMI has been submitted, it is possible it will be returned to the Grantee for rework. This most commonly occurs due to failing to attach the correct documentation, making an error on the proposal, or additional clarification needed. See also the Common Issues (page 40) included within the Other Information (page 33) section below.

If for any reason the submission is returned, the Grantee will be notified via an email message:

Subject State of Illinois Cost Rate Proposal - Attention Required

Attention Required

Your organization's Indirect Cost Rate Proposal (ICRP) has been reviewed and additional information is required.

[Click here](#) to access your organization's survey in the Centralized Indirect Cost Rate Negotiation system (also known as CRMP). Click on the blue "Survey Comments" button to see and provide response to comments from a Reviewer regarding the survey.

If additional information and revisions are required, these revisions should be submitted within (30) days of receipt.

REMINDER: Review of ICRPs will be handled on a first come – first serve basis. Therefore, if revisions are not completed in a timely manner, the grantee will run the risk of not utilizing an approved indirect cost rate on current State awards.

Assistance

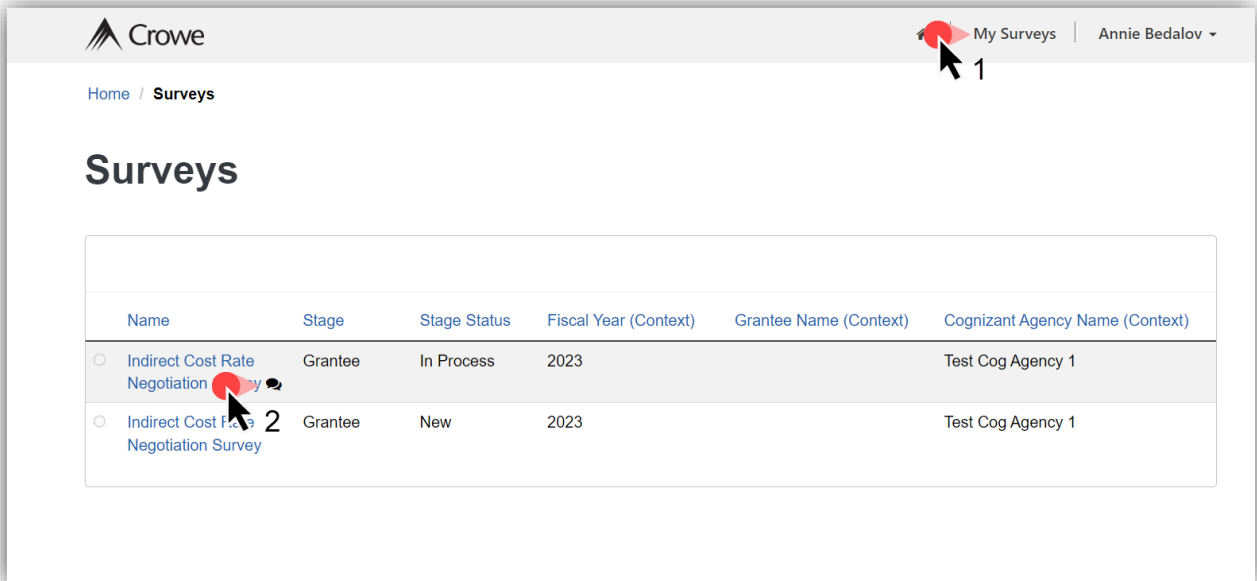
For technical assistance related to your organization's Indirect Cost Rate Proposal (ICRP), please contact your State Cognizant Agency. State Cognizant Agency contact info can be found within the [Grantee Portal](#).

For assistance related to accessing or navigating the CRMP application, please contact Crowe LLP at GOMBSupport@crowe.com or 1-800-599-9110.

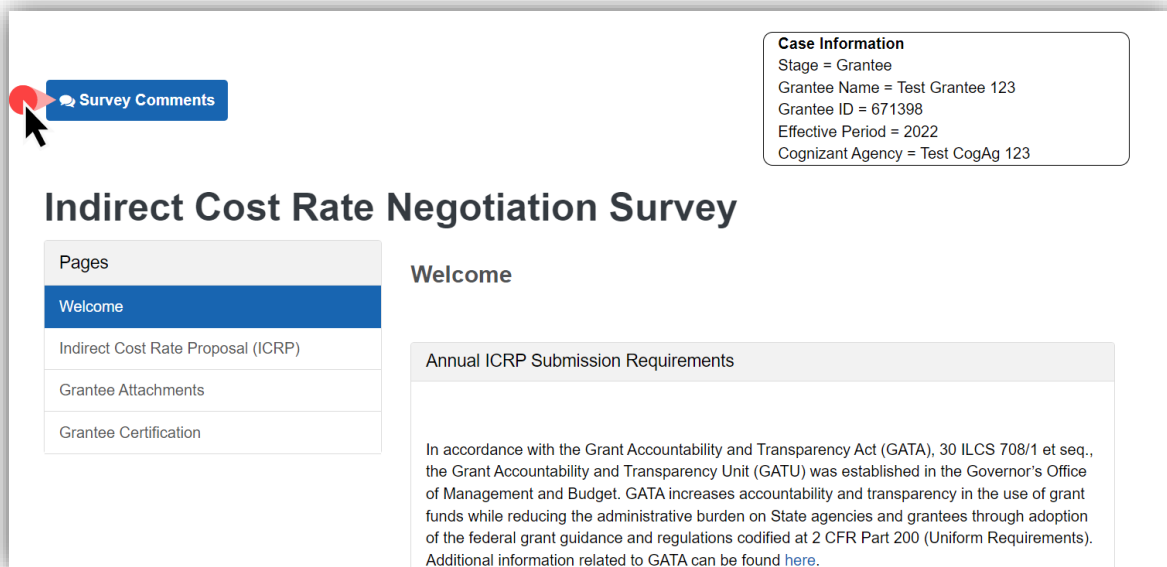
For individuals with disabilities according to the Illinois Information Technology Accessibility Act (IITAA), Public Act 095-0307, please contact the GOMB support line at 888-241-9426 or OMB.GATA@illinois.gov

Once logged into CRMP, to navigate to the Reviewer’s survey comments:

1. Click on My Surveys in the gray bar at the top of the page. Then click on the chat bubble icon next to the name of the survey.



2. Grantees can access survey comments from within from within a Survey by clicking the blue Survey Comments button at the top of the survey.



Grantees can open a comment record to provide a response and additional attachments if requested by the Reviewer.

- Click **Reply** to respond to an existing thread, or start a new thread, and click **white Submit button** to save the response.
- Click the **paperclip icon** to attach additional files if requested.
- To save updates to the status of the comments, click the **blue Submit button** at the bottom of the form.

The screenshot shows a 'Comments' form with the following elements:

- Title:** Demo comment title
- Description:** Demo comment description
- Status:** In Progress (dropdown menu)
- Text Input:** A text area with a 'Submit' button highlighted in red.
- Sample Comment:** A comment from 'You' dated 4/17/2023 with the text 'This is a sample comment for demo purposes.' and a 'Reply' button highlighted in red.
- Attachments:** A 'Demo PDF.pdf' attachment.
- Bottom Buttons:** A 'Submit' button highlighted in red.

A set of statuses are used by the Reviewer to track the status of the review comments. Grantees may return to their survey to view the status of comments at any time. Grantees may respond to comments while they are in the “**In Progress**” status and can update the status to “**Answered**” when they have completed their response. See below for description of each status.

The 'Status' dropdown menu is shown with the following options:

- Draft
- New
- In Progress** (highlighted in red)
- Answered** (highlighted in grey)
- Resolved

- **Draft** – The Reviewer will utilize this status as they are drafting a new review comment. In the Draft stage, no response is required by the Grantee.
- **New** – The Reviewer will change the comment to “New” when it is ready for Grantee review and response.
- **In Progress** – The Grantee will utilize this status as they are working on a comment. In addition, the Reviewer can move an Answered comment back to In Progress for re-work by the Grantee.

- **Answered** – The Grantee will utilize this status once they have completed answering the comment and attaching any relevant additional documentation and it is ready for review.
- **Resolved** – The Reviewer will change the comment status to resolved once it has been sufficiently addressed and any additional documentation provided has been reviewed and no further action is needed by the Grantee.

Based upon review, the Reviewer may *recommend Cognizant Agency assistance*. This occurs when there is a significant number of comments or issues identified. These surveys are marked as “flagged.” As the Reviewer cannot assist in both the preparation and review of the proposal, the Cognizant Agency will assist with any questions/concerns regarding the comments/updates required. It is imperative the Grantee works directly with the Cognizant Agency prior to submitting the survey for re-review. The re-review will not begin until the Reviewer has received an approval to proceed from the Cognizant Agency and from the Grant Accountability Transparency Unit (GATU).

The survey should not be resubmitted by the Grantee in CRMP until all comments are thoroughly addressed. If the Grantee has any questions regarding review comments, the Grantee should reach out directly to the Reviewer, or, if flagged, to the Cognizant Agency.

Once the Grantee has addressed all comments, the Grantee will then resubmit the survey using the Submit button at the bottom of any page, as was done for the initial submission. The Grantee may optionally add additional comments responses as desired, similar to the process explained above, within the Review Comments page.

Note: If a Grantee has not accessed its survey for 6 months, it will be archived within the system. If additional time is needed, you must reach out to the GOMB support line for approval.

Flagged Surveys

As noted above, a survey may be flagged by a Reviewer due to the amount of rework and assistance required. When this occurs, the Grantee should work directly with their Cognizant Agency prior to resubmission. The Reviewer will email both the Grantee and the Cognizant Agency notifying them that the Survey has been flagged and requires further assistance. The Cognizant Agency should reach out to the Grantee to address the items that have been flagged and work with the Grantee to resolve the identified issues. However, the Grantee should also proactively contact the Cognizant Agency directly to resolve the issues identified.

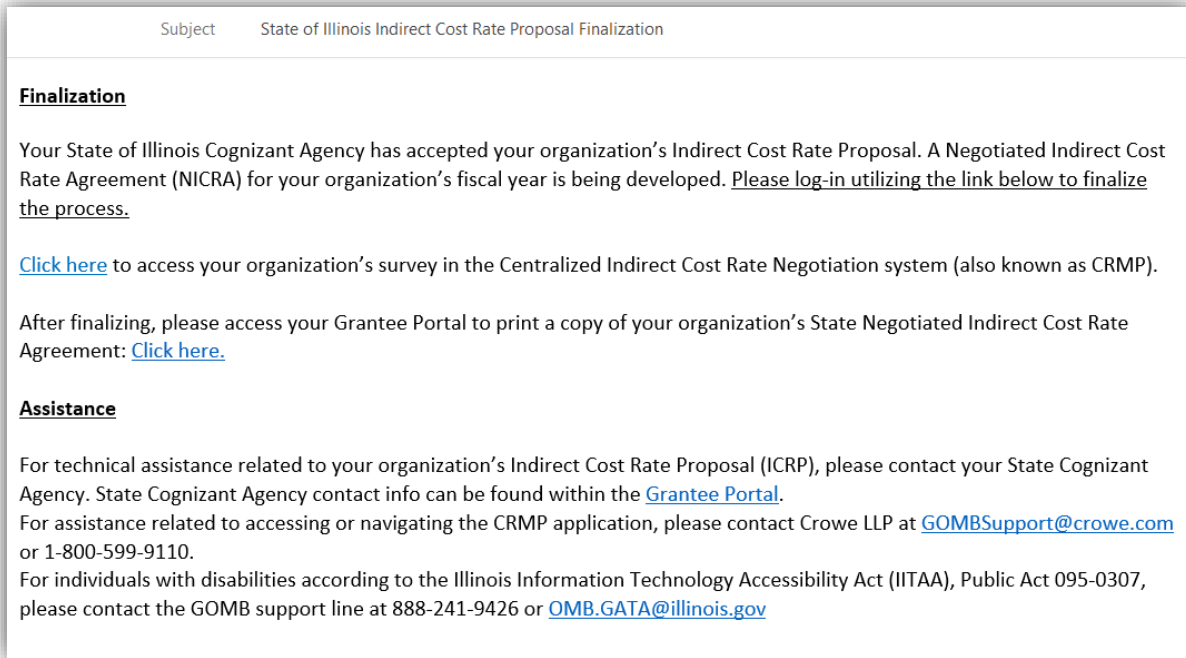
Once the Cognizant Agency has reviewed each comment and proposal updates and approved the updated survey for resubmission, the Cognizant Agency should notify GATU that the case is ready for GATU review. Included in the email from the Cognizant Agency to GATU, should be the approval for re-review form. Note: this form will be emailed from the Reviewer to the Cognizant Agency with the notification of a flagged case. Below is an example form:

I, as the Cognizant Agency, have reviewed each Reviewer comment and grantee response to each comment and confirm that the comments are sufficiently addressed. I have also reviewed the case to confirm all updated information has been properly attached to the case. I confirm this case is ready for GATU review.

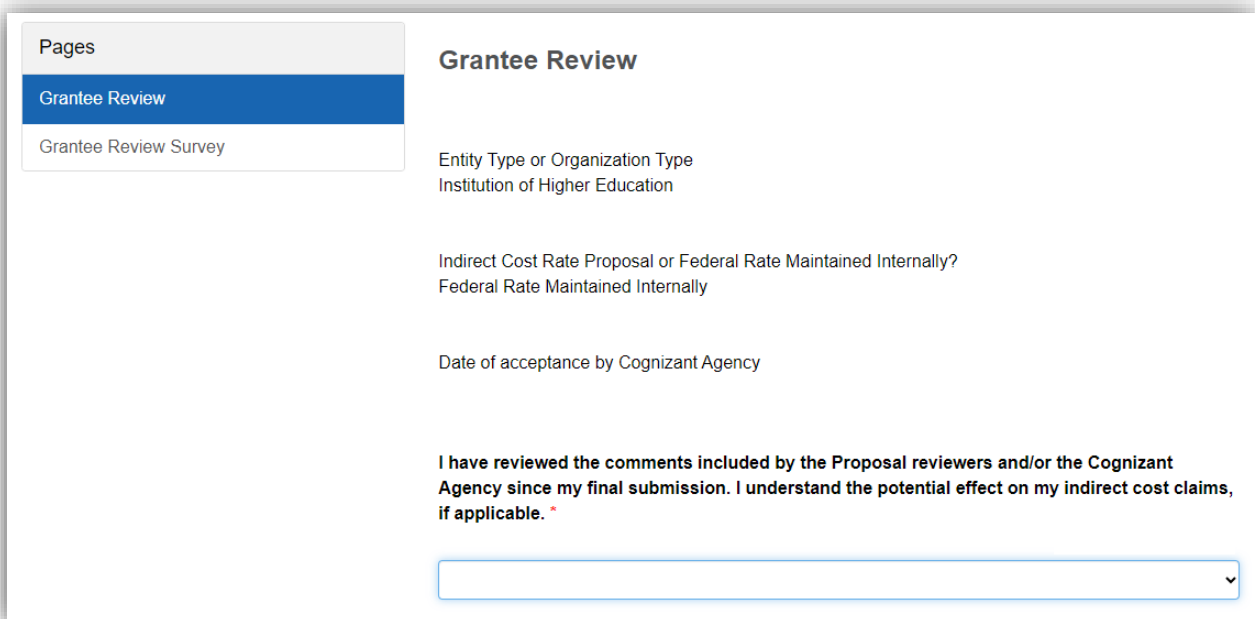
The case will then be reviewed by GATU for approval and sign-off, the Re-review Approval Form (with all signoffs) should be attached to the survey and the survey should be resubmitted in CRMP. **Do not submit** a flagged survey until Cognizant Agency and GATU sign-off and approval to resubmit is received. A survey will not be re-reviewed until approval has been received by both the Cognizant Agency and GATU.

Final Grantee review

Once the ICRP or FRMI has been reviewed and approved, the Cognizant Agency will accept the final determination. Upon acceptance, an email notification will be immediately sent to the Grantee. An example of this email is shown below.



After receipt of the above email, the Grantee should log back into CRMP to finalize acceptance. This stage requires a few questions to be completed prior to finalization. In addition to questions regarding acceptance of the rate, there is an optional grantee review survey for the Grantee to provide feedback on the process.



Pages	Grantee Experience Survey
Grantee Review and Confirmation	
Grantee Experience Survey	

Please respond to the following questions by selecting 1 through 5 with the value of **5 being the highest rating, 1 being lowest rating.**

Was the Crowe Review & Monitoring Platform (CRMP) user friendly?

Were the reference materials, links and training materials useful/helpful?

Was the process easy to follow?

Once the Grantee has answered all the questions simply **click the Submit button**. After clicking Submit, the screen will refresh, and the survey is complete. The survey will remain available for reference in the Survey view.

III. Cognizant Agency

After the ICRP / FRMI submission has been reviewed and approved by Crowe, it is submitted to the Cognizant Agency for final review and acceptance. All Cognizant Agency representatives are included in a weekly email distribution, sent by GOMBSupport@Crowe.com, which includes various reports providing an overview of all surveys ready for review and acceptance, as well as “flagged” surveys.

To be added to CRMP and the weekly distribution list, contact GATU and GOMBSupport@crowe.com.

1. Invitation to CRMP Survey Management Application

Cognizant Agency users will receive **an invitation to the CRMP system**, for the first log-in to the system, via email. As the sender’s email inbox is not monitored, please do not reply directly. The email account that should be used for support/assistance is GOMBSupport@crowe.com.

1. **Users will receive a Microsoft invitation** resembling the screenshot below to the CRMP Survey Management Application. This will set up access to the component of CRMP which Cognizant Agency users utilize to oversee and interact with surveys for Grantees it is cognizant for.

See the next page for an example of the invitation.

Click **Accept Invitation**.

From: Microsoft Invitations on behalf of CroweAT <invites@microsoft.com>
Date: Tue, Oct 17, 2023 at 2:20 PM
Subject: invited you to access applications within their organization
To:

i Please only act on this email if you trust the individual and organization represented below. In rare cases, individuals may receive fraudulent invitations from bad actors posing as legitimate companies. If you were not expecting this invitation, proceed with caution.

Sender:
Organization: CroweAT
Domain: CroweAT.onmicrosoft.com

This message was provided by the sender and is not from Microsoft Corporation.



Message from

Crowe LLP is inviting you to access the new State of Illinois Indirect Cost Rate Negotiation System, the Crowe Review & Monitoring Platform (CRMP). CRMP access is required for all state grant making agencies. This access provides agencies an overview of all grantee surveys for which they are cognizant and provides a direct link into the grantee's survey.

If you accept this invitation, you'll be sent to <https://myapplications.microsoft.com/?tenantid=c1cedd73-d687-4c40-89f5-7fbbb48a8af3>.



[Accept invitation](#)

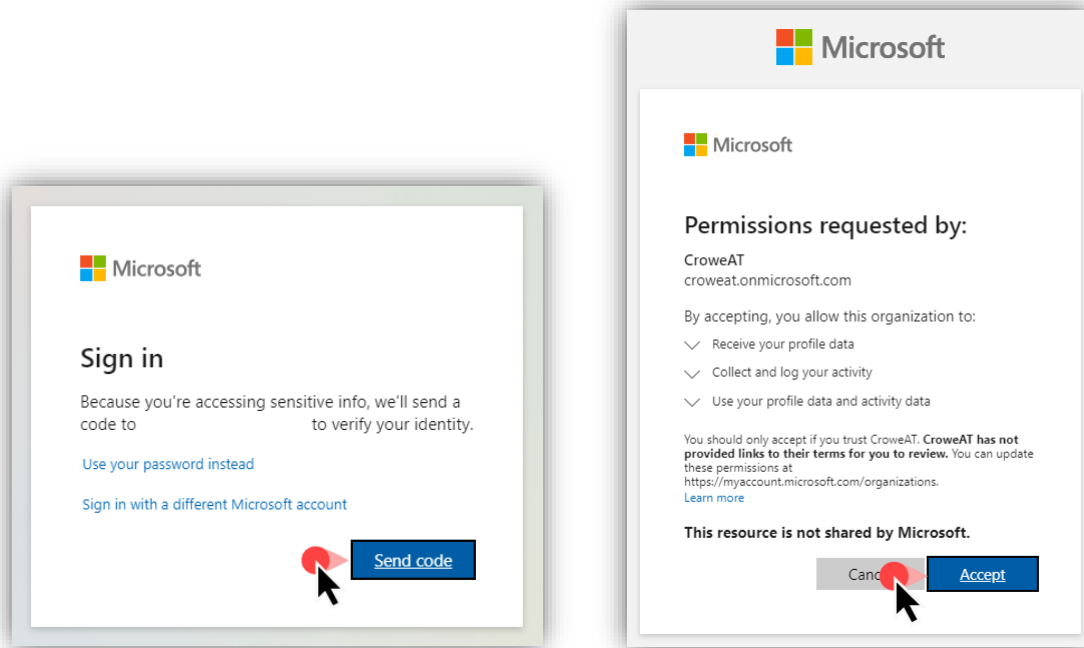
[Block future invitations](#) from this organization.

This invitation email is from CroweAT (CroweAT.onmicrosoft.com) and may include advertising content. CroweAT has not provided a link to their privacy statement for you to review. Microsoft Corporation facilitated sending this email but did not validate the sender or the message.

Microsoft respects your privacy. To learn more, please read the [Microsoft Privacy Statement](#).
Microsoft Corporation, One Microsoft Way, Redmond, WA 98052

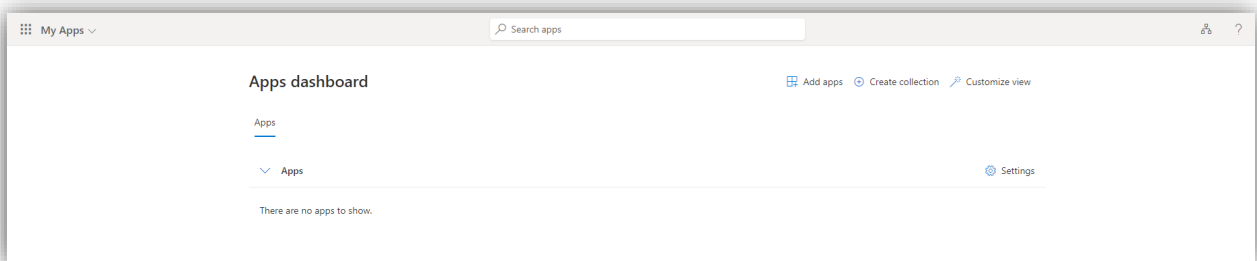


Users will be asked to enter a verification code and accept the permissions request.

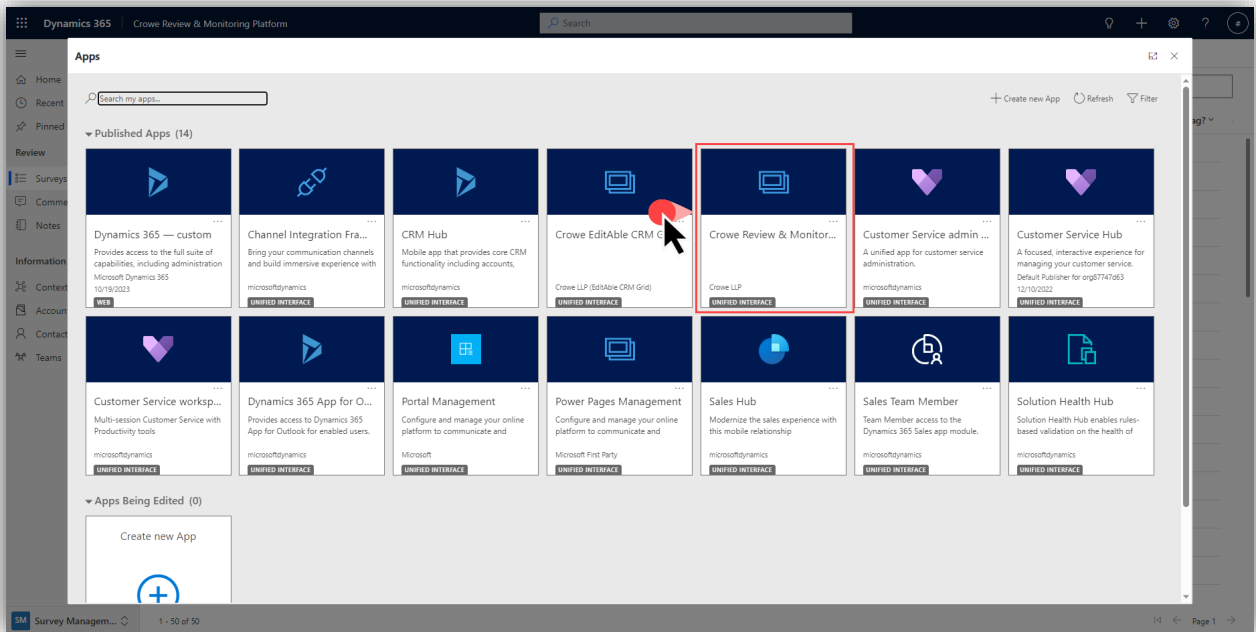


After accepting, users will be brought to the screen below. Once users have activated their account by logging-in, they will be assigned a security role within 24 hours. After receiving email confirmation from the GOMB support mailbox that security roles have been assigned, Cognizant Agency users can **login using their Microsoft credentials** to the application: <https://crmpgomb.crm.dynamics.com/>

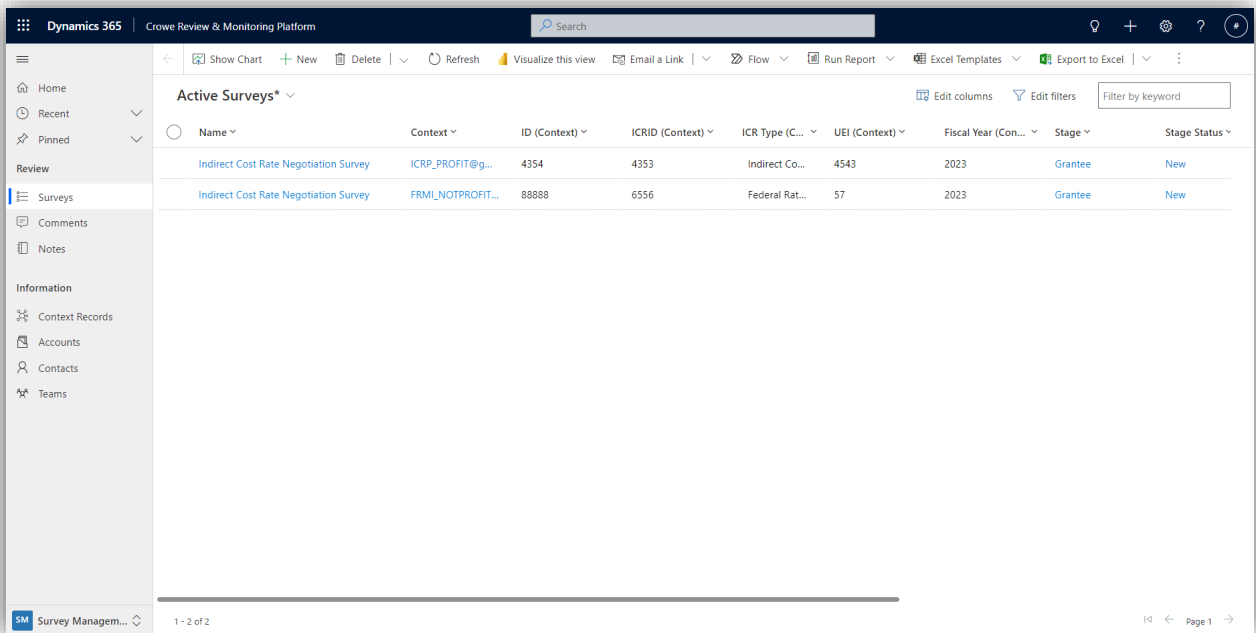
If you do not see content within CRMP after 24 hours, please email GOMBSupport@crowe.com.



When logging into the above URL for the first time, users may see a view similar to the below screenshot. Depending on the users Microsoft organization, they may see one or more tiles on the screen. **Select the tile labeled “Crowe Review & Monitoring Platform.”**



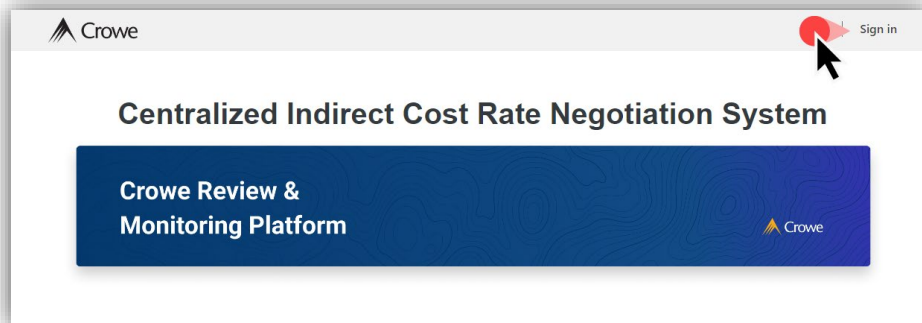
Then, users will be brought to a list (or view) of surveys for which they are the Cognizant Agency. Depending on each user’s screen size, the number of columns displayed will vary. Use the scroll bar on the bottom of the page to see additional columns of information related to each survey (or row).



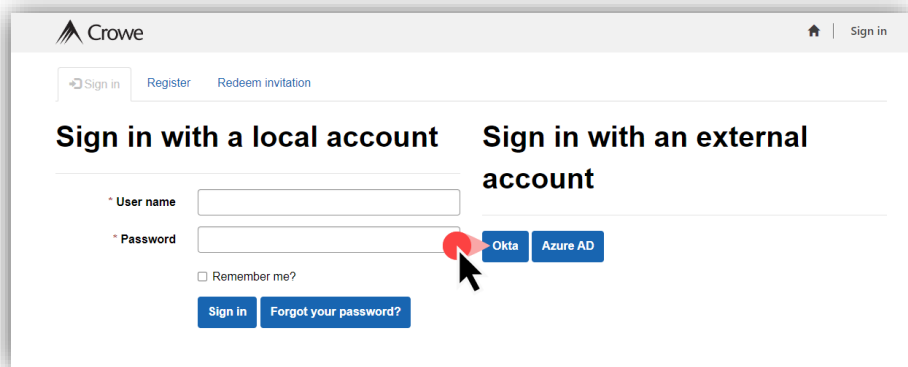
2. Logging into CRMP Survey Portal for the first time

In addition to the CRMP Survey Management Application, Cognizant Agency users will also need to access the CRMP Survey Portal to view the content of grantee surveys and provide survey responses themselves. Cognizant Agency users can login to the CRMP Survey Portal directly at the website URL: <https://crmpgomb.powerappsportals.com>

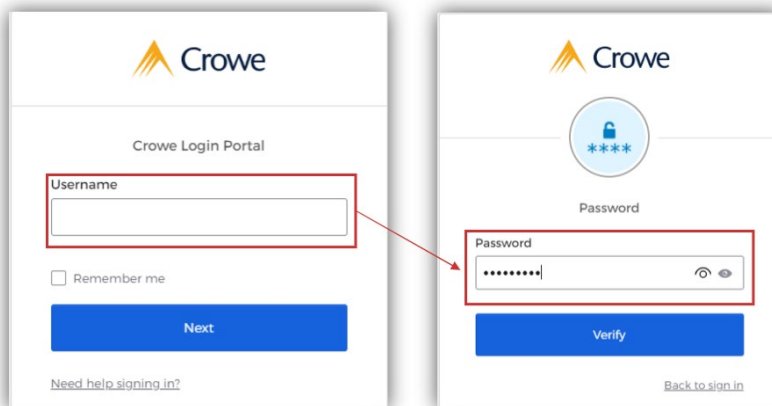
Click the **Sign in** button in the top-right hand corner of the page.



Then, click the **Okta** button under the Sign in with an external account section.



Enter username (email address) and the temporary password (**Gomb@123**) provided by GOMB Support.



After logging in with the temporary password, users will be asked to create a new password and setup multifactor authentication.

Crowe

Your Okta password has expired

Password requirements:

- At least 8 characters
- A lowercase letter
- An uppercase letter
- A number
- A symbol
- No parts of your username
- Does not include your first name
- Does not include your last name
- Password can't be the same as your last 24 passwords

Old password

New password

Repeat password

Change Password

[Sign Out](#)

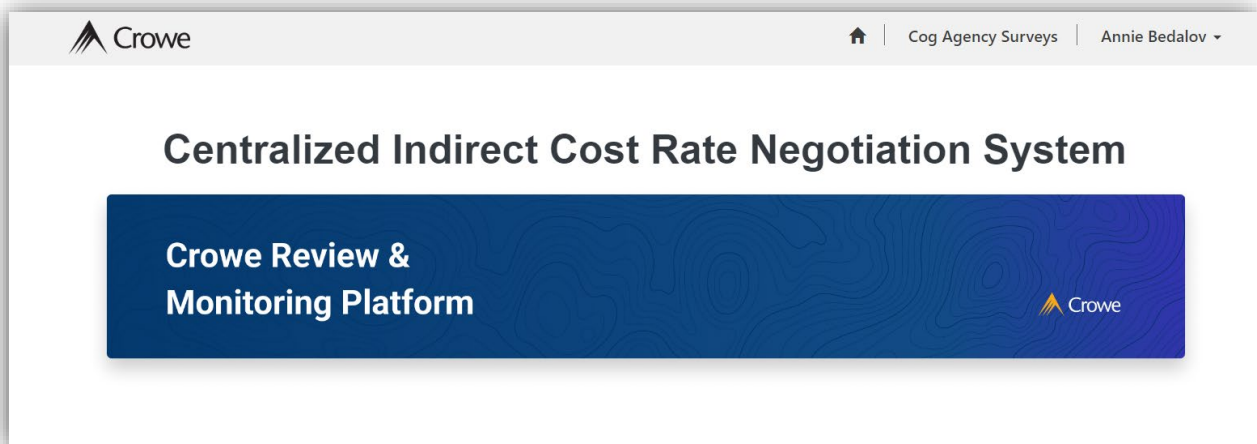
Crowe

Set up multifactor authentication

Your company requires multifactor authentication to add an additional layer of security when signing in to your Okta account

- Okta Verify**
Use a push notification sent to the mobile app.
[Setup](#)
- Google Authenticator**
Enter single-use code from the mobile app.
[Setup](#)
- SMS Authentication**
Enter a single-use code sent to your mobile phone.
[Setup](#)
- Email Authentication**
Enter a verification code sent to your email.
[Setup](#)

Logged in users should be able to navigate to the CRMP homepage, with their name appearing in the top-right hand corner (where the Sign in option displayed previously).

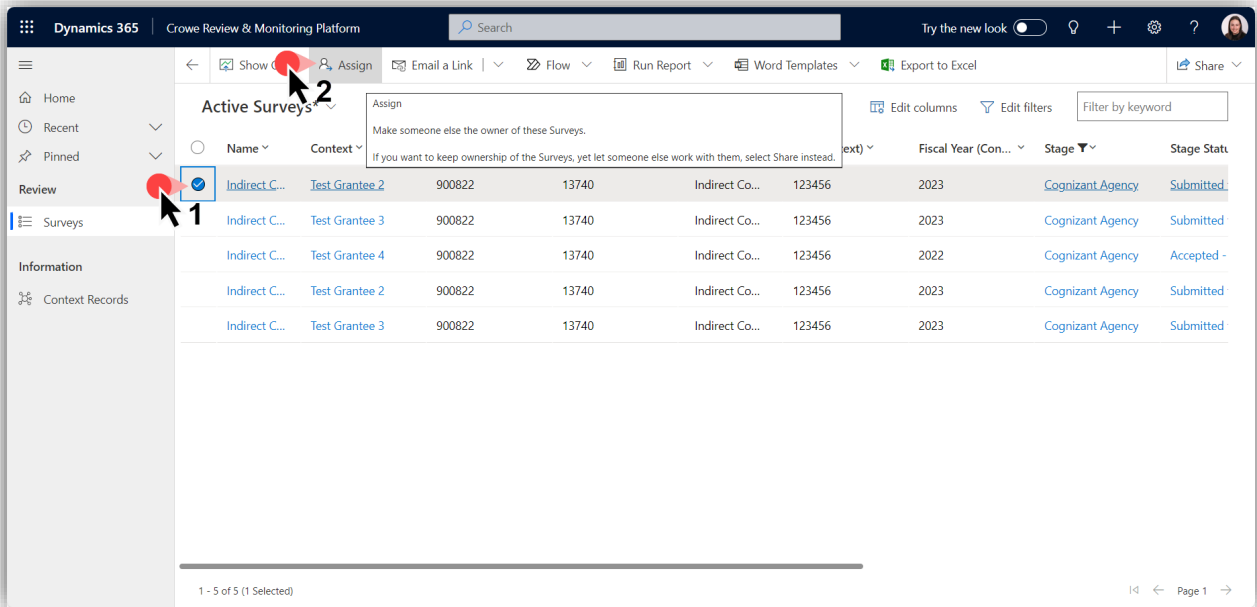


3. How to review the ICRP / FRMI submission

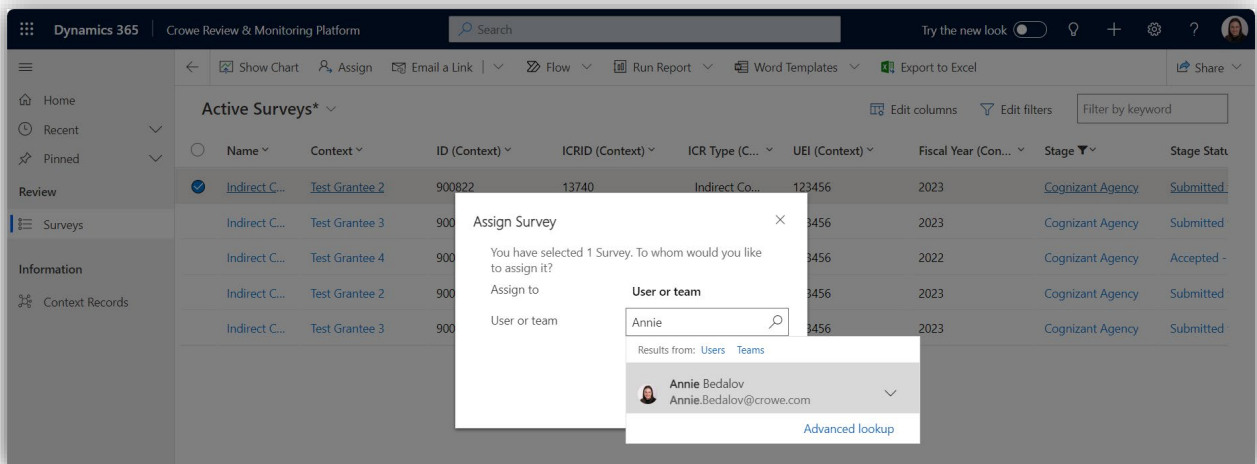
1. Assign a Grantee’s survey record to one user at the Cognizant Agency

All users within the same Cognizant Agency are part of a “team” which has access to view survey records assigned to their agency. To review and interact with a specific Grantee’s survey, the survey must be assigned to one user on the “team” of cognizant agency users at a time.

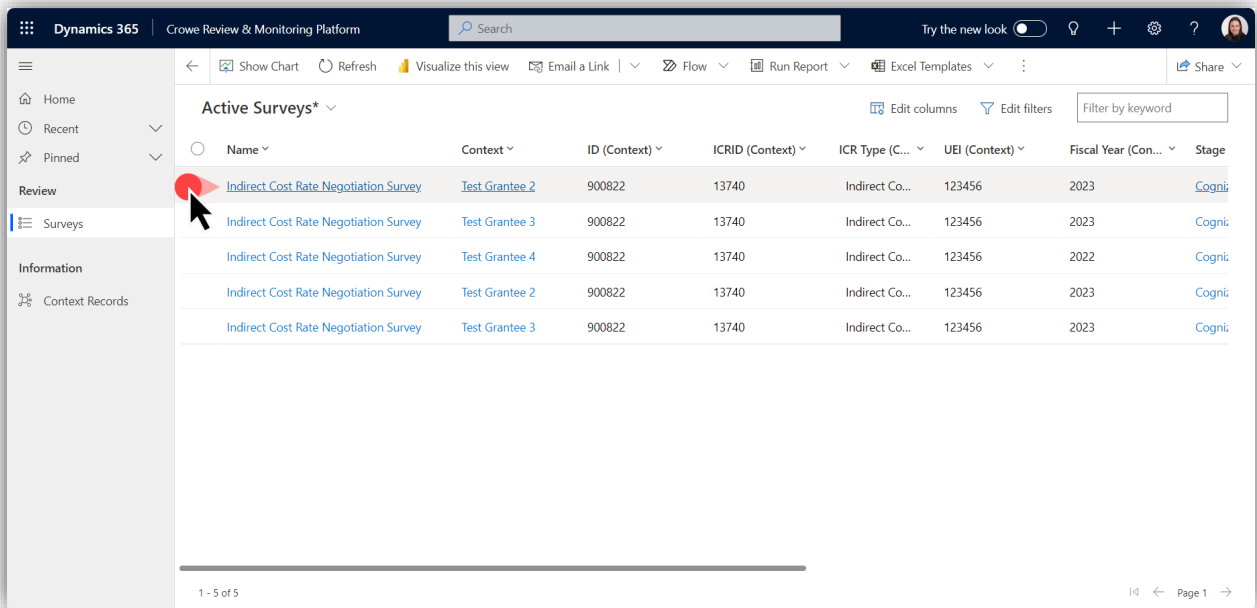
First, select one or more rows from the list view by clicking the circle on the left-hand of the row. Then, click the Assign button at the top of the page (the command bar).



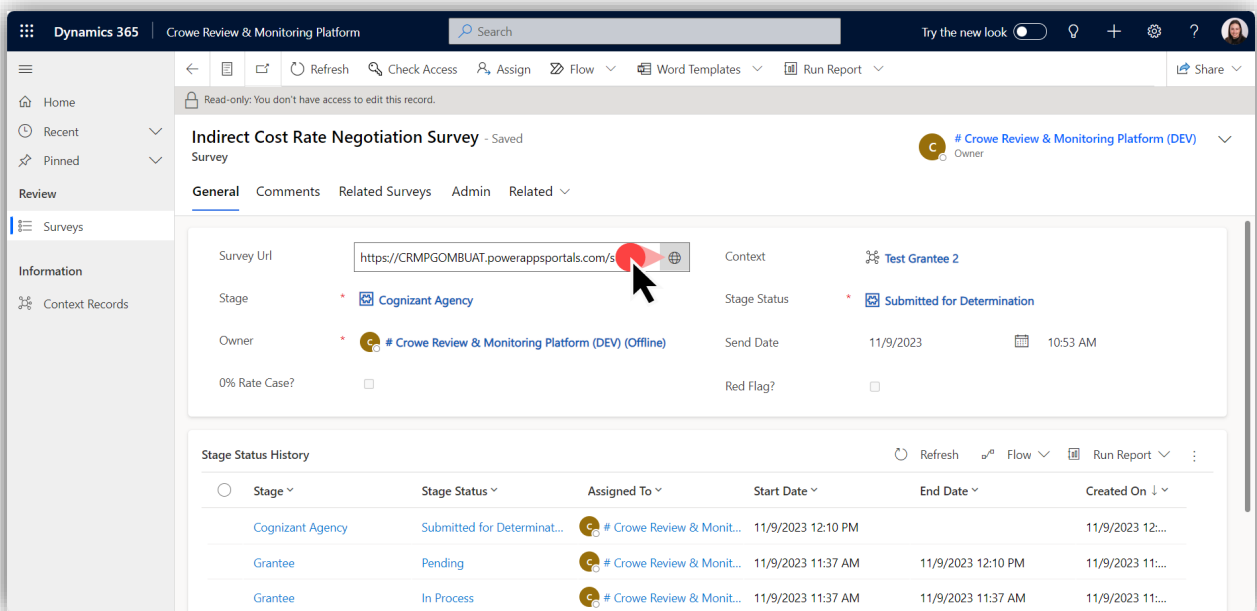
A new window will display on the page which allows users to type the name of the users they would like to assign the survey record to. Click the name of the user, then click Assign.



- Click the blue hyperlink in the “Name” column to **open the survey record**. This will bring users into the survey, where they can see more information about the record.



- Click on the **Globe icon** next to the URL to open the survey content in the CRMP Portal.



If the user is not already logged into the CRMP Portal, they should sign-in using their Okta credentials (see page 24).

4. Accepting or Not Accepting Grantee's Election

Upon completion of review over the Grantee and Reviewer stages, there are required questions to complete within the Cognizant Agency page of the survey to make final acceptance. Below is an example of the questions and possible responses.

If accepting the ICRP / FRMI, identify acceptance by responding as “Yes,” and include the date of acceptance. Then, complete the remaining questions on that page and select the **Submit** button. This will send the survey to the next stage, Grantee Review, and notify the Grantee.

The screenshot shows the 'Indirect Cost Rate Negotiation Survey' interface. On the left is a 'Pages' sidebar with 'Cognizant Agency Review' highlighted. The main content area is titled 'Cognizant Agency Review' and contains a 'Cognizant Agency Determination' section. A question asks, 'As this grantee's Cognizant Agency, do you accept this/these indirect cost rate(s). *' with a dropdown menu set to 'Yes'. Below this, a date field is labeled 'Enter the date the acceptance was made. *' and contains '11/13/2023'.

Return To Reviewer QC Previous Next Save **Submit**

If not accepting the ICRP / FRMI, respond as “No,” and provide a detailed explanation as to why. Then select the **Return to Review QC** button. This will send the survey back a stage to Reviewer QC for rework to Crowe.

The screenshot shows the 'Indirect Cost Rate Negotiation Survey' interface. On the left is a 'Pages' sidebar with 'Cognizant Agency Review' highlighted. The main content area is titled 'Cognizant Agency Review' and contains a 'Cognizant Agency Determination' section. A question asks, 'As this grantee's Cognizant Agency, do you accept this/these indirect cost rate(s). *' with a dropdown menu set to 'No'. Below this is a text box labeled 'Please describe the reason for not accepting. *'.

Return To Reviewer QC Previous Next Save Submit

5. Survey History

Click the blue **Survey History** button at the top of the survey. This will display the historical log of the survey's lifecycle, showing when each stage and stage status was started and ended. See page 42 for more information about the definition of each stage and stage status.

Attachments

Audit Trail

Survey History

Related Surveys

Case Information

Stage = Grantee
 Grantee Name = ICRP_PROFIT@gmail.com
 Grantee ID = 4354
 Effective Period = 2023
 Cognizant Agency = Cog Agency-3

Pages

- Welcome!
- Attachments
- Certification
- Reviewer
- Reviewer QC Block
- Cognizant Agency
- Grantee Review
- Grantee Review Survey

Indirect Cost Rate Negotiation Survey

Welcome!

In accordance with the Grant Accountability and Transparency Act (GATA), 30 ILCS 708/1 et seq., the Grant Accountability and Transparency Unit (GATU) was established in the Governor's Office of Management and Budget. GATA increases accountability and transparency in the use of grant funds while reducing the administrative burden on State agencies and grantees through adoption of the federal grant guidance and regulations codified at 2 CFR Part 200 (Uniform Requirements). Additional information related to GATA can be found [here](#).

Annual ICRP Submission Requirements

An organization which has not previously established an Indirect Cost Rate with the State of Illinois must submit its initial Indirect Cost Rate Proposal (ICRP) immediately after the organization is advised that a State of Illinois award will be made or after receipt of a NOSA and, in no event, later than (3)

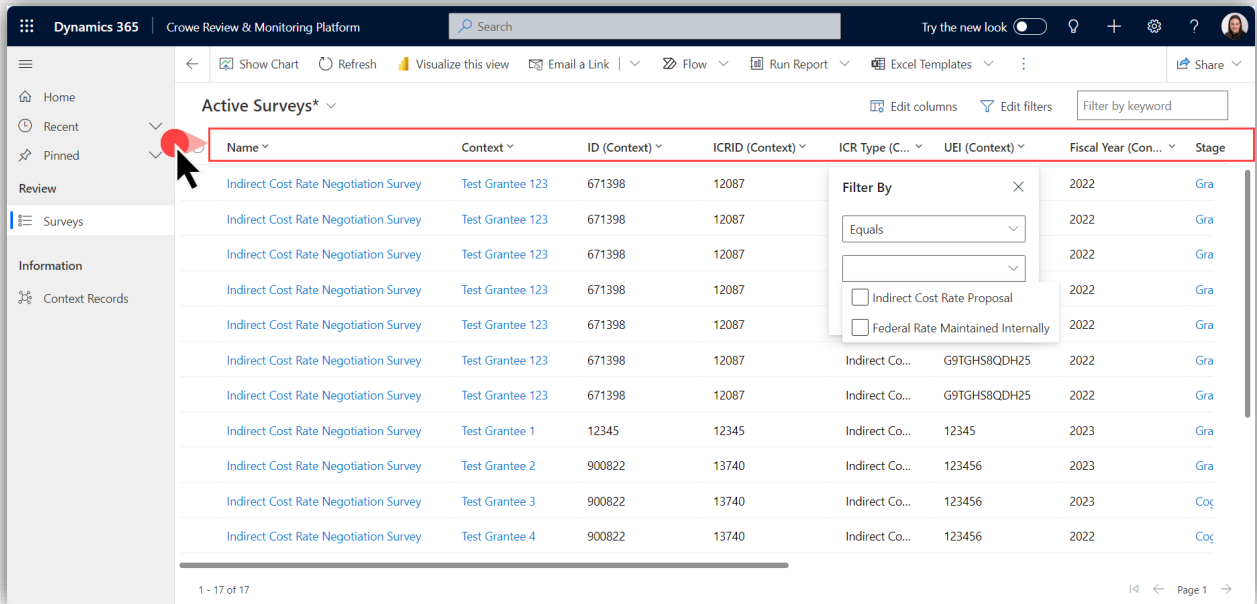
Survey History ✕

Stage	Stage Status	Assigned To	Start Date	End Date	Created On ↓
Grantee	Pending	Grantee Name	3/8/2023 8:36 PM	3/10/2023 5:34 AM	3/8/2023 8:36 PM
Grantee	In Process	Grantee Name	3/8/2023 8:33 PM	3/8/2023 8:36 PM	3/8/2023 8:34 PM
Grantee	New	Grantee Name	3/5/2023 9:54 PM	3/8/2023 8:33 PM	3/5/2023 9:55 PM

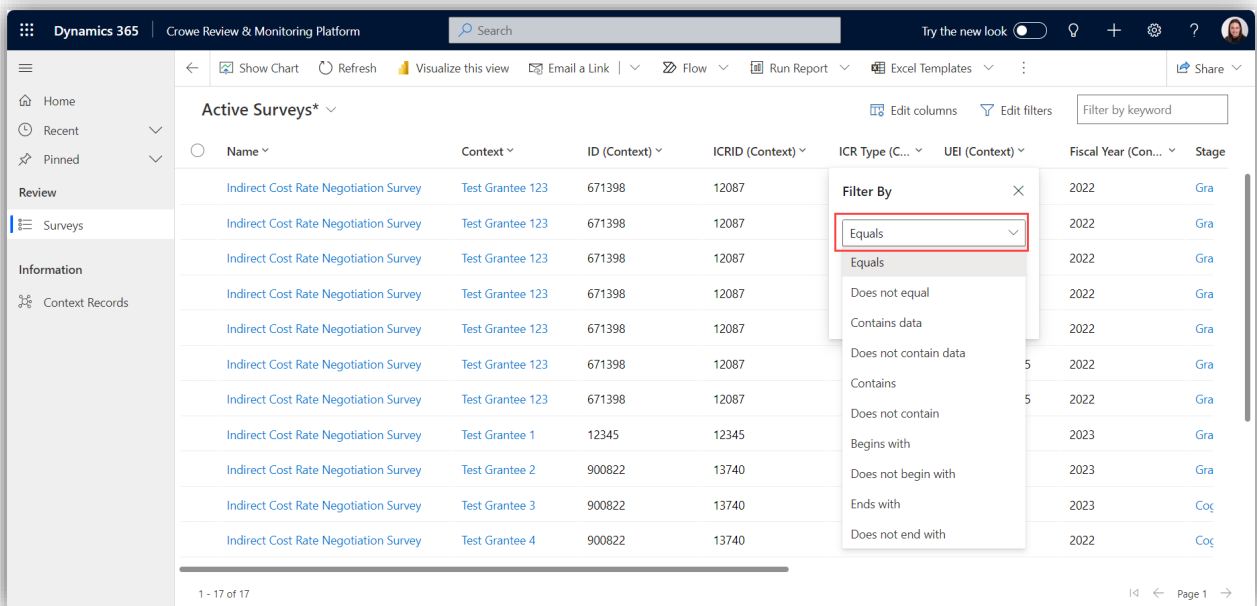
Close

6. Searching and filtering on the Surveys view

When there is a large number of rows of surveys within the list view, it can be useful to sort and filter the data. Users can **click on any of the column headers in the view** to work with a variety of sorting and filtering options.



Data can be sorted alphabetically or click Filter by to see more options. Refreshing the page will erase any filters that have been added.



7. Flagged Grantees

Flagged Grantees require Cognizant Agency assistance prior to survey resubmission. The Grantees are notified their survey is flagged via email from the Reviewer once it is returned. The Grantee is notified to work with the Cognizant Agency to revise, respond to review comments and obtain Cognizant Agency & GATU approval before resubmission. Grantees are flagged when there is a significant number of comments or issues identified, as the Reviewer cannot assist in both the preparation and review of the proposal. It is imperative the Grantee work directly with the Cognizant Agency prior to resubmitting, as the re-review will not occur until the Reviewer has received an approval to proceed from the Cognizant Agency.

The Cognizant Agency should assist the Grantee with addressing Reviewer comments. In addition, the Cognizant Agency should review the survey prior to the Grantee resubmitting in CRMP. Once the Cognizant Agency has reviewed each comment and proposal updates and approved the updated survey for resubmission, the Cognizant Agency should notify GATU that the case is ready for GATU review. Included in the email from the Cognizant Agency to GATU, should be the approval for re-review form. Note: this form will be emailed from the Reviewer to the Cognizant Agency with the notification of a flagged case. Below is an example form:

I, as the Cognizant Agency, have reviewed each Reviewer comment and grantee response to each comment and confirm that the comments are sufficiently addressed. I have also reviewed the case to confirm all updated information has been properly attached to the case. I confirm this case is ready for GATU review.

The case will then be reviewed by GATU for approval and signs-off on the Re-review Approval Form. Once GATU approves and resolves the survey comments, they will notify the Cognizant Agency. The Cognizant Agency should then notify the Grantee the survey may be resubmitted in CRMP once the Re-review Approval Form (with all signoffs) is attached to the case. Grantees should be advised **NOT** to submit a flagged survey until approval to resubmit has been received. Any surveys submitted prior to receiving approval will be moved to a *“Pending CA/GATU Follow up”* queue and will not be touched by the Reviewer until GATU approval to review has been received.

IV. Other Information

1. Indirect Cost Rate Templates

When an organization has selected to negotiate a rate, CRMP will provide a link for a proposal template in excel format to be used by the organization to develop an indirect cost rate proposal. The link will be included on the Indirect Cost Rate Proposal (or Federal Rate Maintained Internally) page on the Review Steps tab within the Grantee stage. If the organization has already developed a proposal utilizing its own methodology or would like to develop its own proposal, the template provided is not required to be used. The template can also be accessed through GATU's website at <https://gata.illinois.gov/indirect-cost1.html>. To complete the template, the organization will utilize its financial information and cost policy statement.

An explanation of each tab within the template is included below:

1. **Instructions** – Provides detailed template instructions for the organization to understand the amounts/information required for each cell.
2. **Allowable & Unallowable Costs** – Provides a summary of the treatment of common costs per the Uniform Grant Guidance or Federal Acquisition Regulations (For-Profits) as to the allowability of cost types. This tab is used as guidance along with the Uniform Grant Guidance and/or Federal Acquisition Regulations to determine if certain costs should be listed as unallowable within the proposal. As a reminder, certain costs might be unallowable for purposes of making a claim for indirect costs but should be included as a direct cost in the template when developing an indirect cost rate.
3. **Entity Name (Step 1)** – Documents the name of the organization.
4. **Employee Wages (Step 2)** – Documents personnel salaries broken down by indirect, direct, and unallowable costs. The personnel information should agree or reconcile to the organizational chart(s) as well as the organization's audited financial statements (or other financial data).
5. **Five Highest Paid (Step 3)** – Documents the top five personnel in terms of salary based on the information listed in step 2. This tab should include the employee's base salary and fringe benefits, if readily known and available. Information input within this tab should agree/reconcile to salary information included in step 2. If the information does not agree, a reconciliation/explanation should be provided.
6. **Cost Pool (Step 4)** – Documents the total amount of fringe benefits and non-salary related costs as well as pulling in the Step 2 salary information. The fringe benefits and non-salary related costs must be broken down by indirect, direct, and unallowable costs. These amounts should agree/reconcile to the audited financial statements (or other financial data) used to complete the proposal. Additionally, the organization must list the required modified total direct cost (MTDC) exclusions at the bottom of the spreadsheet, as applicable. These amounts should be input as negative numbers. *The MTDC section does **not** need to be completed if the base of Salaries and Benefits is used.*
7. **ICR Calculation (Step 5)** – Calculation of the organization's proposed indirect cost rate based on the information provided in the previous tabs. The organization should determine which method is the most equitable base for the organization and input the selected rate into the spreadsheet. The selected rate chosen should also agree to the rate input into CRMP.

All costs provided within the template must agree/reconcile to audited financial statements (or other financial data, if approved for substitution based upon the options included in the Indirect Cost Rate Selection Page section above).

2. Audit Trail

The Audit Trail tracks all changes made to the survey throughout its lifecycle. It is not necessary to visit the Audit Trail tab but is available if there is a reason to determine when a specific change was made to a survey.

Audit Trail ✕

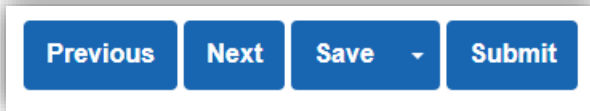
Changed Date	Changed By	Action
10/18/2023 6:13 PM	First & Last Name	Create
Question	Old Value	New Value
I acknowledge my review of the required training materials found here: www.grants.illinois.gov (hyperlink above).		Yes
Contact E-mail		grantee@crmp.com
Grantee Id		541254

Close

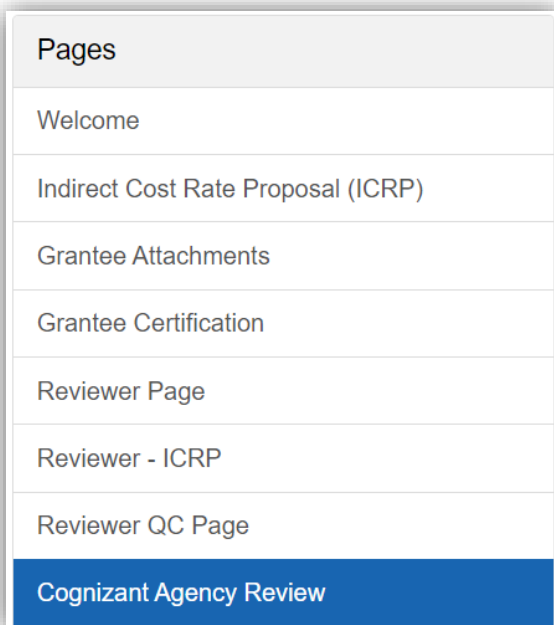
3. How do I save?

As survey responses are entered, CRMP will automatically be saving the work when certain actions are performed.

Clicking the Previous, Next, or Save button at the bottom of the survey will save survey progress.

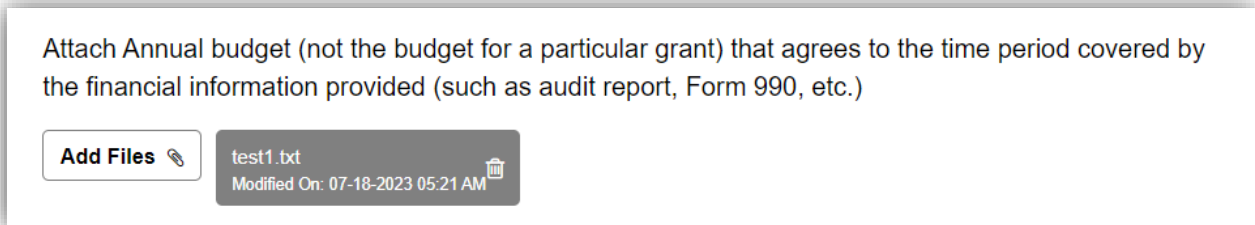


Additionally, any time the user clicks on a new page on the left-hand side of the survey, survey progress is saved when the page is changed.



4. How do I attach documents?

As questions are answered within CRMP, a list of required attachments is dynamically populated. The system will only ask the Grantee to attach documents required based upon responses to the questions. This list is intended to serve as a checklist of items required to be attached. Next to each requested item within the Attachments page, there will be an **Add Files button** with a paperclip icon as illustrated in the screenshot below:

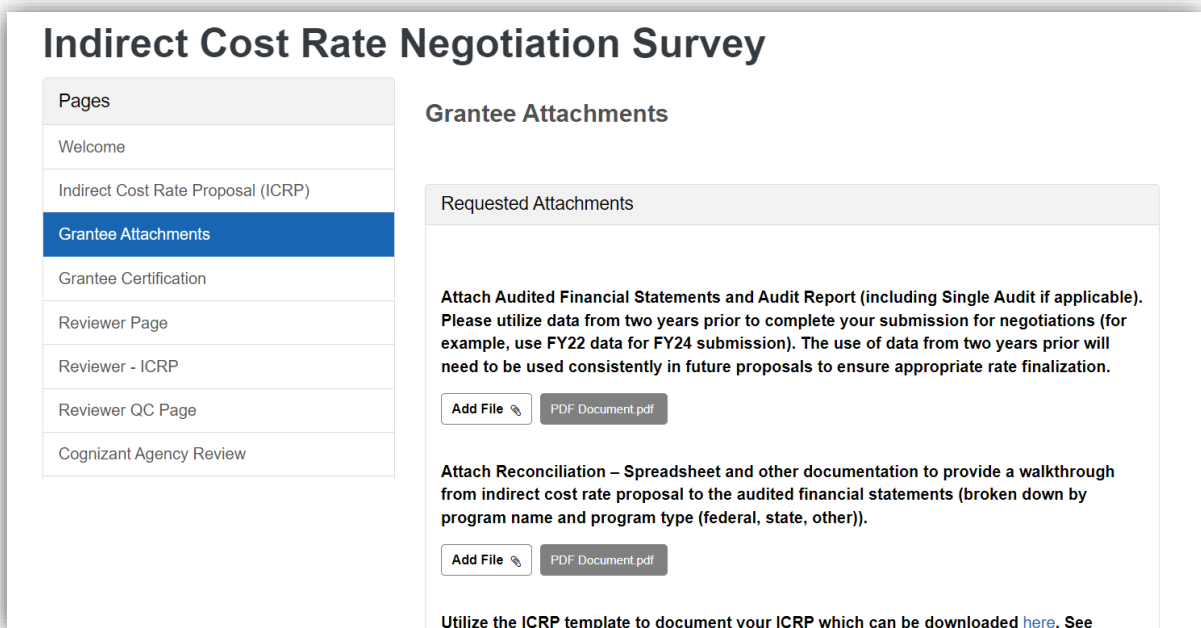


To **attach documents**, click on the **paperclip** icon next to each request. A pop up will appear for the Grantee to select the applicable documents to attach.

To remove attachments before submission, **click the garbage can icon**. Multiple attachments can be added and removed from the same question if needed.

The Grantee will need to click the paperclip icon next to each request and upload the specific requested document. While multiple documents may be uploaded for one request, do not upload all requested documents on a single request. All required attachments to support the ICRP / FRMI should be attached through the “Attachments” page to the left of the survey utilizing the paperclip icons.

To review Grantee and Reviewer attached documents, see the **Grantee Attachments page**. Below is an example of what a typical attachments tab may look like. Clicking on the name of any attachment will download the file.



5. Related Surveys

The Related Surveys button will display any additional survey records in CRMP for which the Grantee ID is the same. Click the blue arrow icon to open a related survey.

Related Surveys

Survey Name	Stage	Stage Status	Assigned To	Last Updated On
Indirect Cost Rate Negotiation Survey	Grantee	In Process	Brittany Curtis	10/12/2023 3:41 PM
Indirect Cost Rate Negotiation Survey	Grantee	New	Brittany Curtis	09/07/2023 2:27 PM

« 1 »

Close

6. Dynamic questions, help text, and required questions

Dynamic Questions - CRMP has been designed to walk the Grantee through the process specific to the organization. The Grantee should not have to answer questions not applicable to the organization/entity type, nor asked to attach documents not applicable due to the dynamic nature of the application. As questions are answered, questions and pages appear/disappear based on applicability.

Help Text - Certain questions also have help text associated to them. This appears beneath a question response and can assist in completing the survey.

Type of Rate * Comments Notes

Provisional rate means a temporary indirect cost rate applicable to a specified period which is used for funding, interim reimbursement, and reporting indirect costs on State of Illinois Awards awards pending the establishment of a final rate for the period.

Type of Rate is a required field.

Required Questions - The user must answer all required questions to submit the survey for review. All questions with an asterisk are considered required questions. An example of the asterisks are highlighted in the screen shot below.

Click to see errors [X]

By submitting this proposal, I certify to the best of my knowledge and belief that the proposal is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and objectives set forth in the terms and conditions of the award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise.*

[Comments] [Notes]

Yes

Name of Official (Chief Financial Officer or an individual designated by an individual at a level no lower than Vice President or Chief Financial Officer)*

[Comments] [Notes]

Bob

Title*

[Comments] [Notes]

Title: is a required field.

If the user attempts to submit the survey without answering the required questions, the system will not allow the survey to be successfully submitted. Unanswered required questions will be outlined in red on the page.

Additionally, at the top of each page a summary of all errors on the page is provided. Clicking on **Click to see errors** will expand to provide more detail about questions remaining unanswered.

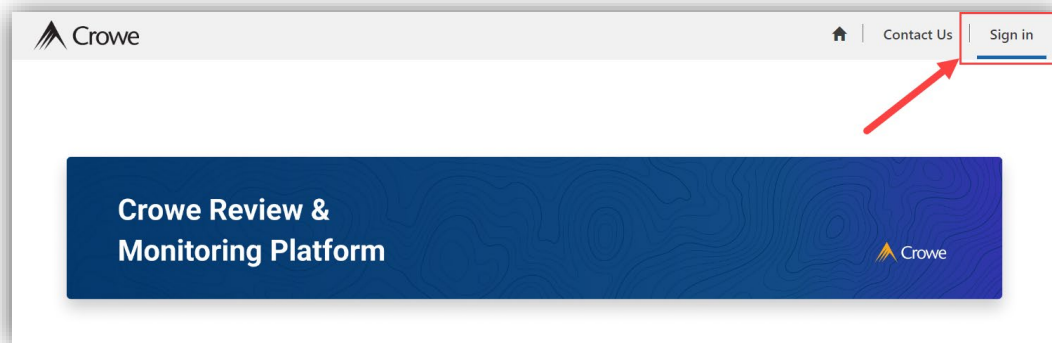
Could not proceed to the next page for the following reasons:

Title: is a required field.

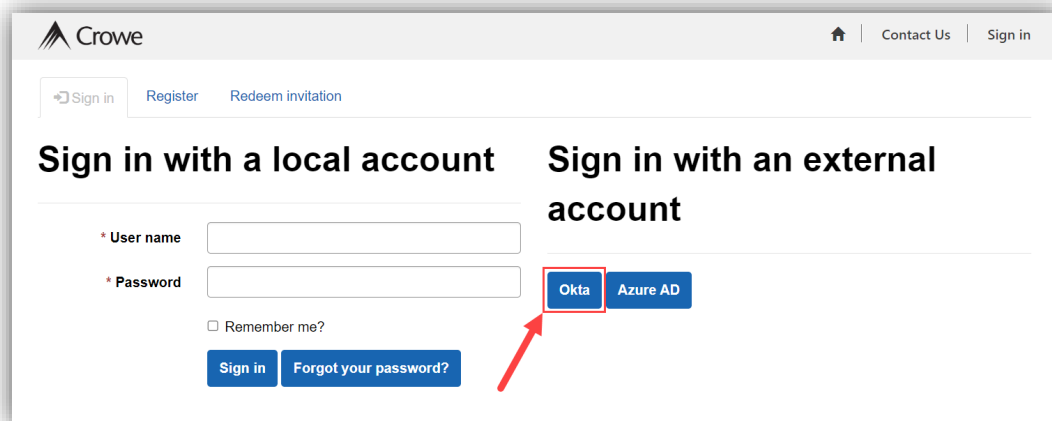
7. I forgot my password

If a user forgets their password, they may click the “Need help signing in?” link on the CRMP Okta login page. This will display options to assist with resetting a password, unlocking an account, and additional help.

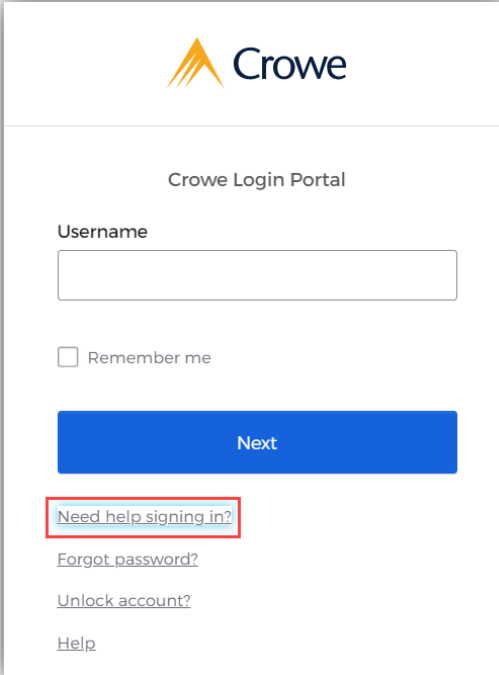
1. Click the **Sign in** button in the top-right hand corner of the CRMP Portal homepage at <https://crmpgomb.powerappsportals.com>



2. Then, click the **Okta** button under the Sign in with an external account section.



3. Click the Need help signing in? link. This will display additional options to assist with account issues.



Crowe

Crowe Login Portal

Username

Remember me

Next

[Need help signing in?](#)

[Forgot password?](#)

[Unlock account?](#)

[Help](#)

8. Why was I invited into CRMP?

Any Grantee that submits their information within the GATA Grantee Portal with an election of State NICRA or FRMI will receive an invitation to CRMP (with the exclusion of Learning Education Agencies (LEAs), who receive indirect cost rates directly from the Illinois State Board of Education, and other special situations). These Grantees are required to go through the CRMP system in order to negotiate an indirect cost rate or get acceptance of a FRMI.

Grantees who have not received an invitation to CRMP, but feel they should have, as well as Grantees with an invitation but feel they do not meet the above criteria, should contact their Cognizant Agency for assistance.

9. Common Issues

Indirect Cost Proposals

1. Missing Documentation – Ensure all required documents as listed on the “Attachments” page are attached. These documents, specifically the Cost Policy Statement, should be fully developed and comprehensive to outline Grantee methodologies. In addition, a reconciliation from the proposal to the financial statements (or financial data utilized) should be provided. If no reconciliation is attached, the survey will be returned to the Grantee prior to commencement of the review process. See additional information below.
2. Incorrect Fiscal Year Audit Report – Ensure the correct fiscal year audit report is attached and utilized. The audit report should be two fiscal years in arrears of the ICRP proposal. For example, if a Grantee is proposing an FY24 rate, they should be submitting an FY22 Audit Report. This

- allows for rate finalization in future years. There may be exceptions to this process.
3. Budget Figures Utilized – The proposal should be completed using actual amounts from the audited financial statements, rather than budget figures. There are certain situations when it does not make sense to use audited financial statements and a budget should be used. If budget figures are utilized, detailed rationale (such as significant changes to activities/programs/etc.) and supporting documentation as to why the Grantee has chosen not to use the audited financial statements must be provided. The Grantee may want to reach out to its Cognizant Agency/GATU/GOMB support line for a discussion prior to utilizing budget figures.
 4. Proposal does not agree to the supporting documentation:
 - a. The costs listed within the indirect cost rate proposal must agree/reconcile to the amounts listed in the audit report. If the amounts do not agree, attach a reconciliation or crosswalk to agree the amounts as well as detailed explanation for the reconciling items. The reconciliation should be detailed and include the breakout of costs both by cost category and allocation category (indirect, direct, unallowable, federal, state, other).
 - b. If the proposal includes a central service cost allocation plan (CSCAP), this should also include a reconciliation to the ICRP and the financial statements.
 - c. The information included in the proposal should agree to the Cost Policy Statement.
 - d. Employee positions/titles should agree/reconcile to the organization chart. If this cannot be easily shown, a crosswalk should be provided to agree all positions to the organizational chart.
 5. Proposal does not agree to itself – There are several steps within the proposal that relate to each other. These steps should agree or reconcile. For example, the employee data listed in Step 3, Five Highest Paid, should agree to employee data listed in step 2, Employee Wages.
 6. Unallowable costs – The Uniform Guidance should be thoroughly reviewed to understand unallowable costs and how to manage unallowable costs within an indirect cost rate proposal. Certain costs are unallowable for purposes of claiming indirect costs with the awarding agency but may need to be included as a direct cost within the proposal to arrive at an accurate indirect cost rate. Normally if an unallowable cost is an indirect cost, it would be included as unallowable within the proposal **but if it is a direct cost that is unallowable for claiming purposes, it should be reported as direct for rate development purposes.** Costs should be reviewed in detail to determine the allowability and correct reporting within the proposal. Details for unallowable costs should be properly explained.
 7. MTDC Exclusions – Certain costs, such as rent/lease of capital assets, participant support costs, etc., should be excluded from the MTDC base. These should be reported as negative amounts within the bottom section of Step 4. These are often not properly included or recorded incorrectly as positive amounts. MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs.
 8. Incomplete Cost Policy Statement – The Cost Policy Statement must address the basis of accounting, fiscal period, allocation method, cost basis, other applicable accounting policies and the allocation methodology for every cost category line item that is listed as a cost category on the proposal (salaries, wages and fringe benefits, as well as all cost categories included on Step 4, including unallowable costs). A Reviewer must be able to determine the allocation methodology used for each of the cost category items listed within the proposal. The methodology should also be illustrated within the chart of accounts support (e.g., cost categories listed as direct costs can be tied to general ledger accounts). For ICRPs, the Cost Policy Statement must also be signed.
 9. Misalignment between the Cost Policy Statement and Proposal – Ensure the allocation of the costs between direct, indirect, and unallowable on the proposal matches the allocation methodology listed within the Cost Policy Statement.

10. What does the stage status mean?

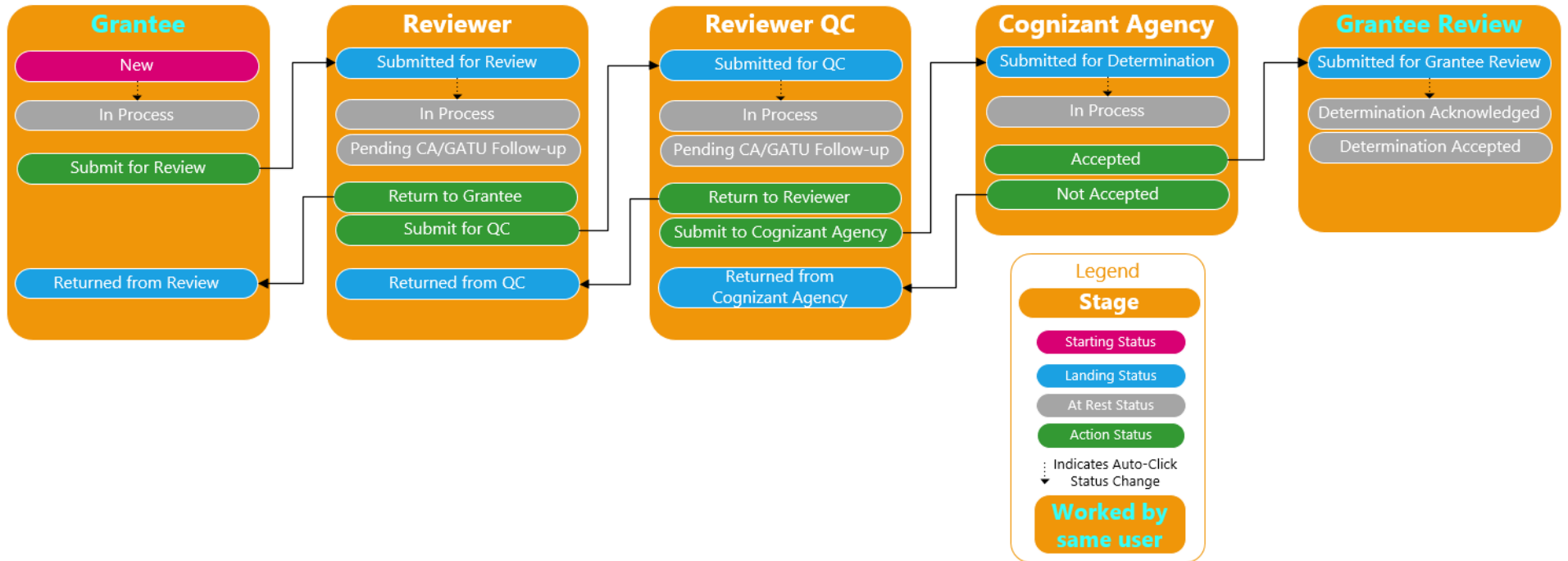
Stage Type	Stage Status	Description
Grantee	New	Survey is brand new and has never been accessed by the Grantee.
Grantee	In-Process/Pending*	The survey is within the Grantee's survey view for edit and submission.
Grantee	Returned from Review	The survey has been returned from Review and is within the Grantee's survey view but not yet opened by the Grantee.
Reviewer	Submitted for Review	The survey has been submitted for Review but not yet opened by the Reviewer.
Reviewer	In-Process/Pending*	The survey is within the Reviewer's survey view and is currently being reviewed.
Reviewer	Returned from QC	The survey has been returned to the Reviewer by the quality control (QC) Reviewer but not yet opened by the Reviewer.
Reviewer QC	Submitted for QC	The survey has been submitted by the Reviewer to the QC Reviewer but has not yet been opened by the QC Reviewer.
Reviewer QC	In-Process/Pending*	The survey is within the QC Reviewer's survey view and is currently being reviewed.
Reviewer QC	Returned from Cognizant Agency	The survey has been returned to Crowe from the Cognizant Agency because they have not accepted it for some reason.
Cognizant Agency	Submitted for Determination	The survey has been submitted to the Cognizant Agency for approval but has not yet been opened.
Cognizant Agency	In-Process/Pending*	The survey is within the Cognizant Agency's survey view and is currently being reviewed.
Grantee Review	Submitted for Grantee Review	The survey is for a fully negotiated or federally approved rate and has been accepted by the Cognizant Agency and is now back in the Grantee's Survey view for review of determination.
Grantee Review	Determination Acknowledged	The survey has been opened by the Grantee after Cognizant Agency acceptance, but the Grantee has not yet indicated their acceptance.
Grantee Review	Determination Accepted	The Grantee has accepted the survey. This is the final stage/status of the process.

* Survey will move from In Process to Pending when the user saves the survey but does not move it forwards or backwards in the workflow.

11. Acronym Definitions

- a. CRMP – Crowe Review & Monitoring Platform
- b. ICRP – Indirect Cost Rate Proposal
- c. FRMI – Federal Rate Maintained Internally
- d. GOMB – Governor's Office of Management and Budget
- e. GATU – Grant Accountability and Transparency Unit
- f. LEA – Learning Education Agency
- g. NICRA – Negotiated Indirect Cost Rate Agreement
- h. CPS – Cost Policy Statement
- i. CSCAP or CAP – Central Service Cost Allocation Plan or Cost Allocation Plan
- j. MTDC – Modified Total Direct Costs
- k. ICR – Indirect Cost Rate

12. Visualization of workflow within CRMP



*Pending CA/GATU Follow-up is identified as a Flagged grantee in CRMP.