



Access to Federal Title Programs Applications in SERVS

The Elementary and Secondary Education Act (ESEA) Title I, II and III program narrative and budget applications are completed using the State Educational Record View and Submission (SERVS) system. Initial SERVS Financial access is given to the district superintendent or charter executive director. They must be designated as the Identified Official with Authority (IOWA) to access the funds and authorize staff who work within the Title application.

In submitting an application, districts must be aware that there are three distinct stages in the process for completing and submitting the required documents:

1. Initial access
2. Application in SERVS
3. Application submission

There are several different steps that must be completed before the program director can actually enter the Title applications. These are:

- Review the [Title Application Roles Assigned in SERVS Financial](#)
- Get access the SERVS Financial System by becoming an [Identified Official with Authority \(IOWA\)](#)
- Assign staff access [Requesting External User Recertification Access](#)
- [New user](#)
- [Returning user](#)

Title Application Roles Assigned in SERVS Financial

Any person expected to use SERVS Financial needs to be given permission by the Identified Official with Authority (IOWA). Each person can be assigned only **one** of the four roles. Some roles can read and write within the application while others have read-only access.

There are four (4) different Authorized User roles

1. Approve Application and Budget (authorized representative—superintendent/charter director):
 - Accept funds/manage allocation/balance forward
 - Approve application and budget for submission to the Minnesota Department of Education (MDE)
 - Read/write in application and budget
 - Enter/edit organization information
 - View payment request—cannot request funds

2. Application and Budget (program representative):
 - Read/write in application and budget
 - Complete narrative and budget revisions with input from the district's team
 - Submit a grant application to Authorized Representative for signature
 - View payment request—cannot request funds
3. Account Register (school district or agency accountant, role of business office accountant):
 - Register/Request Draws:
 - Submit a grant application to Authorized Representative for signature
 - Revise budget/manage allocation/balance forward
 - Read grant and budget
 - Read/Write in register/checkbook to draw funds
4. Additional readers:
 - Read only

Becoming an Identified Official with Authority (IOwA)

The following information is extremely critical for using the SERVS Financial System. The IOwA is the only person who has legal authority to access the funds and submit an application. This person must be:

- A school district superintendent; or,
- A charter school executive director or board chair.

Complete steps 1-3 on the [External User Access Recertification](#) page to be designated as the IOwA. Please allow five business days for approval.

Step 1: Email the official school board minutes on the district letterhead to the [SERVS access coordinator](#). The language in the school board resolution/agenda should state:

“The Minnesota Department of Education (MDE) requires that school districts annually designate an Identified Official with Authority to comply with State Access Control Security Standard 1.0 which states that all user access rights to Minnesota state systems must be reviewed and recertified at least annually. The Identified Official with Authority (IOwA) will assign job duties and authorize external user’s access to MDE secure systems for their local education agency (LEA). The Director recommends the Board authorize insert *name of the IOwA* to act as the IOwA for *insert district name and identification number*.”

Step 2: Email [SERVS access coordinator](#) with the name of the designated IOwA.

Step 3: The [SERVS access coordinator](#) will contact you to help you complete the pre-authorization process. Please allow from five business days for approval.

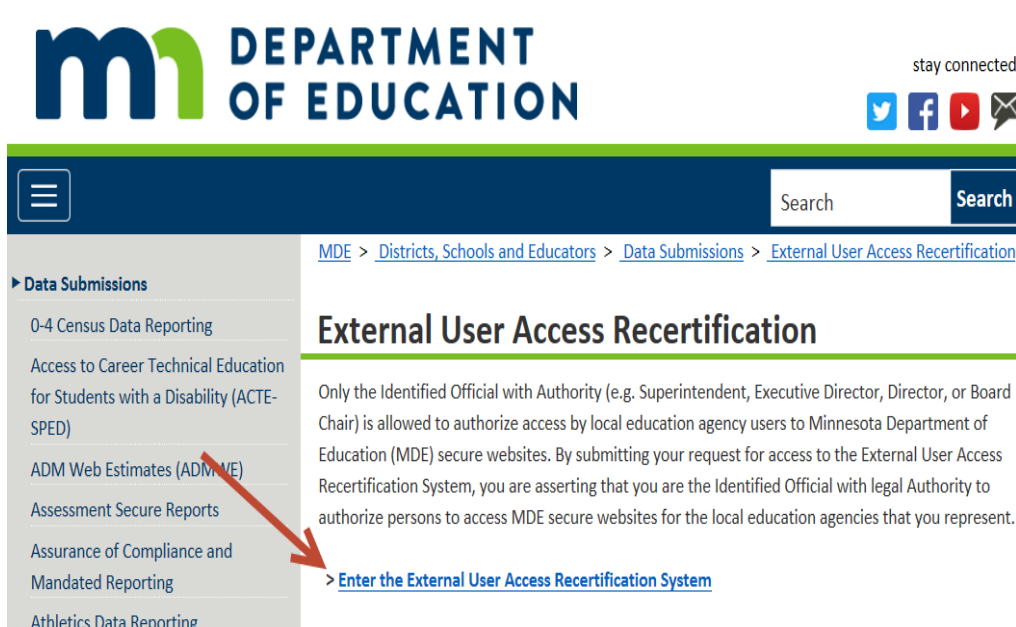
If you have questions or concerns, contact the SERVS access coordinator at 651-582-8500.

Requesting SERVS Financial Access Authorization

The designated Identified Official with Authority (IOWA) must submit a user access preauthorization for each staff member that needs access to the Title applications in the SERVS Financial System.

Step I – Directions for Superintendent or Executive Director

1. Identify the staff that should have access to the Title applications in SERVS Financial and the level of access to be granted for each of them.
2. Access the [External User Access Recertification System](#) on the MDE website.



3. Login.
4. Select Add Pre-Authorizations.
5. New Users: Select the green box to enter new user information. Add the staff member's information, application and role.
6. Returning Users: Select their name, application and role from the drop-down menus. You can add or reduce the number of staff per role.
7. Select the specific application from the drop-down list.
8. Select 1 of 4 roles (see title application roles assigned in SERVS Financial).
9. Save.

The Minnesota Department of Education strongly recommends that the entire list of pre-authorizations be reviewed annually. As staff retire or leave, it is critical to remove their names from the list of pre-authorization. If this is not done, they will continue to have access to your financial systems. See image below for an overview of the User Access Recertification screen.

The screenshot displays the 'User Access Recertification' page for 'ACME Public School District'. The page title is 'Add PreAuthorizations for ACME Public School District'. A green button at the top reads 'I would like to enter a new User'. Below this are three dropdown menus: 'Current User' (with 'Select current user...' text), 'Application' (with 'SERVS Financial System' selected), and 'Role' (with 'Select role...' text). A green 'Add Pre Authorization' button is positioned below the 'Role' dropdown. A 'SAVE!!!!' button is at the bottom center. A sidebar on the left contains navigation links: 'Home', 'ACME Public School District', 'Add Pre-Authorizations', 'Review Authorizations - User', 'Review Authorizations - Application', 'Export Authorizations csv', 'MOE Authorization Review', and 'Applications and Roles'. Five red callout boxes with arrows point to specific elements: 'Add users with authorized applications and their role' points to the 'I would like to enter a new User' button; 'Enter New User information' points to the 'Current User' dropdown; 'Select Current User from drop down' points to the 'Current User' dropdown; 'Select the financial application from drop' points to the 'Application' dropdown; and 'Select 1 of 4 roles' points to the 'Role' dropdown.

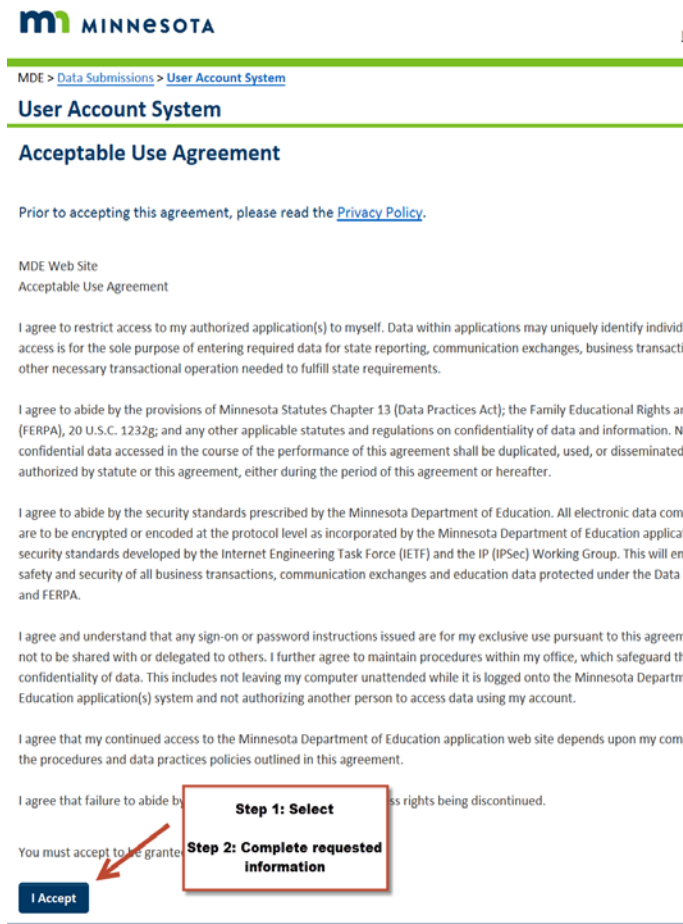
Step II – First-time users: Create an account

After the IOWA (superintendent or charter director) has requested access for the new user, the new user must create an account on the [Data Submissions page](#) on the MDE website.

From the main Data Submissions page, select **Create Account**.



Then read the privacy policy and select **I accept** from the bottom of the page.



Type in the required information and select **Create Account**.

User Account System

Create User Account

Please complete your user account information.

Fields with an "*" are required

* First Name

Middle Name

* Last Name

Full Name

* Email

* Confirm Email

* Phone

Example phone number: 6515828200 or 651-582-8200 or 651.582.8200.

* User ID

Your user ID must be at least 8 characters long.

* Password

Your password must be at least 8 characters

* Re-enter Password

* Security Question

* Security Answer

Step 1: Fill in the required information

Step 2: Select "Create Account"

NOTE: If you already requested access to this application with your MDE user account and you still see the *Authorization Required* page when you log in, then your initial access request has not yet been approved. Please allow up to five business days for approval and processing.

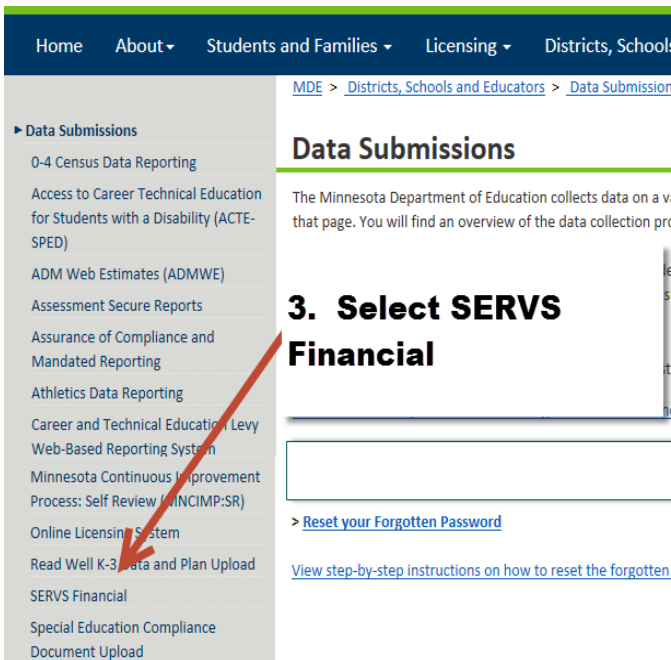
If you have questions or concerns contact, Melody Pomerenke at 651-582-8500.

Step II – Returning Users: Access account

1. Find the [Data Submissions page](#) on the Minnesota Department of Education website (Districts, Schools and Educators > Data Submissions).



2. Scroll down and select **Enter SERVS Financial System** on the left side of the screen.



3. Select [Enter the SERVS Financial System](#).

SERVS Financial

The State Educational Record View and Submission (SERVS) system was designed to simplify, consolidate processes.

SERVS Financial helps districts, schools and other eligible entities apply for funding opportunities, submit track budgets.

Districts and schools must designate the staff members able to access this password protected system. Additional information can be found here: <http://education.state.mn.us/MDE/dse/datasub/ExtUserA>

Visit the Grants Directory page for additional information about competitive and formula grants and 1

> [Enter the SERVS Financial System](#)

4. Enter the SERVS Financial System

4. Type your User ID and password. Select the Login button.



User Account System

Please Login With Your MDE User Account

User ID:

Password:

5. Enter your User ID and Password.

Don't Have an Account? [Create Account](#)

NOTE: If you already requested access to this application with your MDE user account and you still see the *Authorization Required* page when you log in, then your initial access request has not yet been approved. All requests are confirmed by the IOWA's authorizations. Please allow five business days for approval.