OHIO TRAFFIC SAFETY OFFICE

FFY 2016 OVI Task Force Pre-Activity Presentation
Who Should View?

The Project Director is required to view the Pre-Activity Presentation and complete the Pre-Activity form.

The Fiscal Officer is encouraged to view the presentation.
## Contact Information – District 1

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allen</td>
<td>Lima</td>
</tr>
<tr>
<td>Defiance</td>
<td>Defiance</td>
</tr>
<tr>
<td>Fulton</td>
<td>Toledo</td>
</tr>
<tr>
<td>Hancock</td>
<td>Findlay</td>
</tr>
<tr>
<td>Hardin</td>
<td>Findlay</td>
</tr>
<tr>
<td>Henry</td>
<td>Bowling Green</td>
</tr>
<tr>
<td>Lucas</td>
<td>Toledo</td>
</tr>
<tr>
<td>Paulding</td>
<td>Van Wert</td>
</tr>
<tr>
<td>Putnam</td>
<td>Lima</td>
</tr>
<tr>
<td>Van Wert</td>
<td>Van Wert</td>
</tr>
<tr>
<td>Williams</td>
<td>Defiance</td>
</tr>
<tr>
<td>Wood</td>
<td>Bowling Green</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSO Planner** - Kelvin Williams: 614/466-3250  
**LEL** - Frank Arvay: 419/213-0084  
**OSP Patrol Post:**  
[http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
# Contact Information – District 2

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crawford</td>
<td>Bucyrus</td>
</tr>
<tr>
<td>Erie</td>
<td>Sandusky</td>
</tr>
<tr>
<td>Huron</td>
<td>Norwalk</td>
</tr>
<tr>
<td>Marion</td>
<td>Marion</td>
</tr>
<tr>
<td>Ottawa</td>
<td>Sandusky</td>
</tr>
<tr>
<td>Richland</td>
<td>Mansfield</td>
</tr>
<tr>
<td>Sandusky</td>
<td>Fremont</td>
</tr>
<tr>
<td>Seneca</td>
<td>Fremont</td>
</tr>
<tr>
<td>Wyandot</td>
<td>Bucyrus</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSO Planner** - Kelvin Williams: 614/466-3250  
**LEL** - Frank Arvay: 419/213-0084  
**OSP Patrol Post:**  
[http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
## Contact Information – District 3

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ashland</td>
<td>Ashland</td>
</tr>
<tr>
<td>Cuyahoga</td>
<td>Cleveland</td>
</tr>
<tr>
<td>Holmes</td>
<td>Wooster</td>
</tr>
<tr>
<td>Lorain</td>
<td>Elyria</td>
</tr>
<tr>
<td>Medina</td>
<td>Medina</td>
</tr>
<tr>
<td>Stark</td>
<td>Canton</td>
</tr>
<tr>
<td>Summit</td>
<td>Canton</td>
</tr>
<tr>
<td>Wayne</td>
<td>Wooster</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSO Planner** - Michelle Liberati-Cobb: 614/466-3250  
**LEL** – Jack Fleming: 440/787-3848  
**OSP Patrol Post:** [http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
### Contact Information – District 4

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ashtabula</td>
<td>Ashtabula</td>
</tr>
<tr>
<td>Columbiana</td>
<td>Lisbon</td>
</tr>
<tr>
<td>Geauga</td>
<td>Chardon</td>
</tr>
<tr>
<td>Lake</td>
<td>Chardon</td>
</tr>
<tr>
<td>Mahoning</td>
<td>Canfield</td>
</tr>
<tr>
<td>Portage</td>
<td>Ravenna</td>
</tr>
<tr>
<td>Trumbull</td>
<td>Warren</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSO Planner** - Michelle Liberati-Cobb: 614/466-3250

**LEL** – Jack Fleming: 440/787-3848

**OSP Patrol Post:**

[http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auglaize</td>
<td>Wapakoneta</td>
</tr>
<tr>
<td>Champaign</td>
<td>Springfield</td>
</tr>
<tr>
<td>Clark</td>
<td>Springfield</td>
</tr>
<tr>
<td>Darke</td>
<td>Dayton</td>
</tr>
<tr>
<td>Greene</td>
<td>Xenia</td>
</tr>
<tr>
<td>Logan</td>
<td>Marysville</td>
</tr>
<tr>
<td>Mercer</td>
<td>Wapakoneta</td>
</tr>
<tr>
<td>Miami</td>
<td>Piqua</td>
</tr>
<tr>
<td>Montgomery</td>
<td>Dayton</td>
</tr>
<tr>
<td>Preble</td>
<td>Dayton</td>
</tr>
<tr>
<td>Shelby</td>
<td>Piqua</td>
</tr>
<tr>
<td>Union</td>
<td>Marysville</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSO Planner** - Kelvin Williams: 614/466-3250  
**LEL** – SW LEL  
**OSP Patrol Post:**  
[http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
## Contact Information – District 6

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delaware</td>
<td>Delaware</td>
</tr>
<tr>
<td>Fairfield</td>
<td>Lancaster</td>
</tr>
<tr>
<td>Franklin</td>
<td>Columbus</td>
</tr>
<tr>
<td>Knox</td>
<td>Mt. Gilead</td>
</tr>
<tr>
<td>Licking</td>
<td>Granville</td>
</tr>
<tr>
<td>Madison</td>
<td>West Jefferson</td>
</tr>
<tr>
<td>Morrow</td>
<td>Mt. Gilead</td>
</tr>
<tr>
<td>Perry</td>
<td>Lancaster</td>
</tr>
<tr>
<td>Pickaway</td>
<td>Circleville</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSO Planner** - Jackie Stephenson: 614/466-3250  
**LEL** - Mike Brining: 614/946-2878  
**OSP Patrol Post:** [http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
Contact Information – District 7

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Belmont</td>
<td>St. Clairsville</td>
</tr>
<tr>
<td>Carroll</td>
<td>New Philadelphia</td>
</tr>
<tr>
<td>Coshocton</td>
<td>Zanesville</td>
</tr>
<tr>
<td>Guernsey</td>
<td>Cambridge</td>
</tr>
<tr>
<td>Harrison</td>
<td>Steubenville</td>
</tr>
<tr>
<td>Jefferson</td>
<td>Steubenville</td>
</tr>
<tr>
<td>Monroe</td>
<td>St. Clairsville</td>
</tr>
<tr>
<td>Morgan</td>
<td>Marietta</td>
</tr>
<tr>
<td>Muskingum</td>
<td>Zanesville</td>
</tr>
<tr>
<td>Noble</td>
<td>Cambridge</td>
</tr>
<tr>
<td>Tuscarawas</td>
<td>New Philadelphia</td>
</tr>
<tr>
<td>Washington</td>
<td>Marietta</td>
</tr>
</tbody>
</table>

Contact Information:
OTSO Planner - Michelle Liberati-Cobb: 614/466-3250
LEL – Mike Brining: 614/946-2878
OSP Patrol Post: [http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
**Contact Information – District 8**

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adams</td>
<td>Georgetown</td>
</tr>
<tr>
<td>Brown</td>
<td>Georgetown</td>
</tr>
<tr>
<td>Butler</td>
<td>Hamilton</td>
</tr>
<tr>
<td>Clermont</td>
<td>Batavia</td>
</tr>
<tr>
<td>Clinton</td>
<td>Wilmington</td>
</tr>
<tr>
<td>Fayette</td>
<td>Wilmington</td>
</tr>
<tr>
<td>Hamilton</td>
<td>Cincinnati</td>
</tr>
<tr>
<td>Highland</td>
<td>Wilmington</td>
</tr>
<tr>
<td>Warren</td>
<td>Lebanon</td>
</tr>
</tbody>
</table>

**Contact Information:**
**OTSO Planner** - Jackie Stephenson: 614/466-3250
**LEL** – SW LEL
**OSP Patrol Post:** [http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
## Contact Information – District 9

<table>
<thead>
<tr>
<th>County</th>
<th>OSP Patrol Post</th>
</tr>
</thead>
<tbody>
<tr>
<td>Athens</td>
<td>Athens</td>
</tr>
<tr>
<td>Gallia</td>
<td>Gallipolis</td>
</tr>
<tr>
<td>Hocking</td>
<td>Athens</td>
</tr>
<tr>
<td>Jackson</td>
<td>Jackson</td>
</tr>
<tr>
<td>Lawrence</td>
<td>Ironton</td>
</tr>
<tr>
<td>Meigs</td>
<td>Gallipolis</td>
</tr>
<tr>
<td>Pike</td>
<td>Chillicothe</td>
</tr>
<tr>
<td>Ross</td>
<td>Chillicothe</td>
</tr>
<tr>
<td>Scioto</td>
<td>Portsmouth</td>
</tr>
<tr>
<td>Vinton</td>
<td>Jackson</td>
</tr>
</tbody>
</table>

**Contact Information:**

**OTSOptional Parenter** - Jackie Stephenson: 614/466-3250

**LEL** - Mike Brining: 614/946-2878

**OSP Patrol Post**: [http://statepatrol.ohio.gov/Counties.stm](http://statepatrol.ohio.gov/Counties.stm)
Contact Information

• Contact information may change throughout the year, OTSO will keep sub-grantees as up to date as possible.
• These Contact Information slides will be updated as needed. Please refer back to these slides.
FFY 2016 Pre-Activity Form

- Print the FFY 2016 Pre-Activity form from http://ohiohighwaysafetyoffice.ohio.gov
  Use this form to follow along with this presentation.
- **Agency** - enter your agency name.
- **Date** – enter the date you are viewing this presentation.
- **County** – enter the county where you are located.
- Check the box to the left of OVI Task Force.
- **Reimbursement Claim schedule** – check monthly or quarterly. New sub-grantees must check monthly.
Activity Dates

- **Beginning Date** – Grant period will commence after this required pre-activity presentation has been completed and the authorized to proceed date listed in the Award Letter.

- **Ending Date** – All grant activity must be completed by September 30, 2016.

Check the box next to beginning and ending dates on the Pre-Activity form.
All sub-grantees need to generate a Full PDF of their grant outlining the goals, baselines, scopes of work, evaluations, work plans and the budget.

Click on Proposal PDF
PDF

- Click on Generate Full PDF.
- This is an overnight process. The following morning you will receive an email stating that the PDF is ready. It will not be attached to the email.
PDF

- Return to this screen and click on the PDF on the right side.

Check the box next to Generate full PDF on the Pre-Activity form.
Mandatory National Mobilizations

• Click It or Ticket: May 23 – June 5, 2016
• Drive Sober or Get Pulled Over: August 19 – September 5, 2016

• All agencies utilizing overtime enforcement funds from OTSO are required to participate in Click It or Ticket and Drive Sober or Get Pulled Over and report their activity.
• A minimum of two checkpoints are required during the Drive Sober or Get Pulled Over crackdown.
• A minimum of one press event must be conducted during the Drive Sober or Get Pulled Over crackdown.

Check the box next to Mandatory National Mobilizations on the Pre-Activity form.
Allowable Costs

• Personnel/Coordination Expenses (Salaries and Wages)
  • Coordination Hours (up to 20% of enforcement hours)
  • The sub-grantee needs to maintain a coordinator (project director) throughout the grant.

• Public Information and Education (PI&E)

• Meetings

• Travel
  • Keep your receipts
    • Receipts must be itemized
    • OTSO will not reimburse for meals provided by the conference.
      • Special diets and special needs have to be handled in advance with the conference.
    • Follow GSA rates (based on travel location) or your agency’s Travel Policy whichever is less.
Allowable Costs

- Equipment
- Supplies and Materials
- Training
- Education Efforts (up to 5% of enforcement costs)
- Fuel/Transportation Costs (up to 5% of enforcement costs – not education costs)

Refer to pages 57 – 59 of the Grant Solicitation Package for details on each cost category.
Unallowable Costs

- Vehicle Mileage
- Advertising/Public Communications
- Certain Labor Costs
- Alcoholic Beverages
- Food
- Entertainment
- Lobbying
- Office Furnishing & Fixtures
- Central Service Charges

See page 60 of the Grant Solicitation Package for details on each cost category.

Check the box next to allowable and unallowable costs on the Pre-Activity form.
Request to Purchase Form

- Even if the item is approved in the grant, all purchases must be submitted to and approved by OTSO on a Request to Purchase form prior to incurring the cost.
- **Request to Purchase Forms should be submitted at least 45 days prior to the event.**
- **All RTPs must be submitted to OTSO by August 1, 2016.**
- A Request to Purchase form is required for:
  - Supplies
  - Materials
  - Incentives
  - Promotional Items
  - Educational Materials/Educational Hours
  - Equipment
  - Training
  - Travel

Any questions about whether or not a form is required, contact OTSO.

**Check the box next to Request to Purchase form on the Pre-Activity Form.**
Grant Revisions

• Any changes, additions, or deletions to this agreement must be submitted online and approved by OTSO prior to implementing proposed changes.

• A reimbursement claim cannot be submitted while a revision is in process. You must wait until the revision is finalized (approved or rejected). If you have a claim in process and you submit a revision – the revision will be rejected.

• All revisions must be submitted online to OTSO by September 1, 2016.

Check the box next to Grant Revisions on the Pre-Activity Form.
Terms and Conditions

The complete Terms and Conditions are on pages 10 – 26 of the FFY 2016 Grant Solicitation Package.

1) Agreement

Any inconsistencies between agreements and any attached documents shall be resolved in favor of the most current revised agreement on the online system, which shall be the controlling document.

8) Lobbying

None of the funds under this program will be used for any activity specifically designed to urge or influence a state or local legislator to favor or oppose the adoption of any specific legislative proposal pending before any state or local legislative body. Such activities include both direct and indirect (e.g., “grassroots”) lobbying activities.
18) Press Release

Each sub-grantee is required to submit a press release to their local media announcing the grant award, including amount and purpose of award. Additional press releases are required for the OVI Task Force Grant (See #48).

21) GRANTS User Accounts/Password Security

For security purposes, each person using the GRANTS system must have a separate user name and password. Each account must have its own email account. **Sub-grantee agency personnel must not share passwords with agency staff or ODPS staff.**
22) Labor Costs

All work (personnel labor costs) reimbursed under this grant must be for actual paid hours worked. Labor costs based on a percentage of hours worked will not be accepted for reimbursement. Leave hours (e.g., sick, vacation, personal, holiday, etc.) are not reimbursable as direct labor. The employer’s share of fringe benefits (e.g., retirement, Workers’ Compensation, Medicare, etc.) are eligible for reimbursement. Documentation verifying fringe percentages must be available to OTSO upon request.

23) Personnel Activity Reports

Personnel activity reports may be required for any individual working on this federal grant program. These reports, at a minimum, must document date worked, actual activity performed and the number of hours per date to be charged to this agreement. This document must be signed by the individual and his/her immediate supervisor, maintained by the administering agency and submitted as a part of the reimbursement documentation required.
Terms and Conditions

24) Sub-Contracts

All sub-contracts and all purchases made under a sub-contract with any one vendor in excess of a combined total of $5,000 must be submitted to the OTSO for review prior to their execution and are subject to the same laws, regulations, and policies that govern this agreement. Contracts and procurements must include “Special Provisions” as provided by OTSO.

All supplies, materials, incentives, promotional items, education materials, and/or equipment that are purchased as a part of this sub-contract must be submitted to and approved by OTSO on a Request to Purchase form prior to incurring the cost.

Any training courses must be submitted to and approved by OTSO on a Request to Purchase form prior to scheduling.
28) Supplies/Materials/Incentives/Promotional Items/Educational Materials

All supplies, materials, incentives, promotional items and educational materials must be used for approved traffic safety activities throughout its useful life. All purchases must be submitted to and approved by OTSO on a Request to Purchase form prior to incurring the cost. Outreach efforts should be made and materials should be provided to reach the ethnic and/or limited English speaking populations.

Alcohol is not allowed to be purchased with funds from this grant.

The sub-grantee must submit a final draft copy of all promotional materials to OTSO for approval prior to production. In addition:

a) All materials shall include federal sponsorship credit and/or disclaimer clauses as directed by OTSO.

b) All public service announcements funded with federal funds, in whole or in part, must be closed captioned for the hearing impaired.

c) All data results, reports, equipment, supplies and other materials (including but not limited to electronic versions) developed by the sub-grantee must be available to ODPS/OTSO upon request.

****NEW for FFY 2016 - Costs for “incentive” items will be reviewed and approved on a very limited basis in FFY 2016. Funds approved under Other Direct Costs and Supplies and Materials should be used for space rental at events, printing educational card, brochures etc.
Terms and Conditions

30) Travel

Any request for travel and associated costs must be submitted to and approved by OTSO on a Request to Purchase form prior to incurring any travel related costs.

Attendance at any conference/seminar/workshop that charges a registration fee must be submitted to and approved by OTSO on a Request to Purchase form prior to registration. All conferences/seminars/workshops must be traffic safety related; an agenda must be provided to OTSO.

A current travel policy must be submitted with the grant proposal. OTSO will not reimburse for meals provided by the conference. Alcohol is not allowed to be purchased with funds from this grant.

****New for FFY 2016 - All out of state travel conducted under this grant agreement will be reimbursed using U.S. General Services Administration (GSA) rates based on travel location or your agency’s travel policy whichever is less.
31) Training

The cost of training personnel for traffic safety purposes may be funded when
the training supports both the goals and scope of work of the approved grant
program and the goals of OTSO. All training requests and purchases must be
submitted to and approved by OTSO on a Request to Purchase form prior to
incurring the cost.

34) Reimbursement Claims

This agreement will operate on a reimbursement basis only. The administering
agency must first incur the costs for approved expenditures and then apply for
the reimbursement. Appropriate and accurate documentation will be required
for each expense. Claim schedules are set up either monthly or quarterly based
on sub-grantees selection on the pre-activity form. Any changes from this
schedule must be made by the sub-grantee in writing. Each sub-grantee must
submit reimbursement claims by the due date assigned to the claim in the
GRANTS System.
Terms and Conditions

36) Narrative Progress Reports

The timetable for submission of narrative progress reports will be determined by OTSO. Each sub-grantee must submit progress reports by the due date assigned to the report in the GRANTS system.

39) Final Report and Final Claim

A final comprehensive annual project activity report must be submitted to OTSO by November 1.

a) Final reports not received by November 1 will result in a 10 percent penalty deduction to the final claim reimbursement.

b) If a final project activity report is received after November 15, the final claim will not be reimbursed.

A properly documented final claim for reimbursement must be submitted to OTSO by November 1.

a) Final claims not received by November 1 will result in a 10 percent penalty deduction in the final claim reimbursement.

b) Final claims received after November 15 will not be reimbursed.
Terms and Conditions

40) Records Retention

All records relating to project activity and/or expenditures must be maintained for review by representatives of the federal or state government for at least three years following the final reimbursement payment.

42) Termination of Agreement

Either OTSO or the sub-grantee may terminate this Agreement for any reason by giving the other party 30 days written notice. If the Agreement is cancelled under this provision, OTSO shall reimburse the sub-grantee for approved work completed and documented to that date. Upon termination all data results, reports and other materials developed by the sub-grantee will become the property of OTSO. All of the equipment, materials and/or supplies provided to the sub-grantee for use under this agreement must be returned to OTSO upon request within 30 days of said written notice. Should any change in federal funding adversely affect OTSO’s ability to complete the fiscal year’s activities, OTSO has the right to revise or terminate the agreement in writing.
Terms and Conditions

44) Enforcing Seat Belt Laws
   The agency will enforce all seat belt and child restraint laws on all traffic stops made under this grant.

47) Mandatory Blitzes
   Funding for all OTSO identified blitzes must be used for saturation patrols and OVI checkpoints only. Directing traffic, conducting parking detail at events, crash investigations, any non-traffic safety related activities, or any activities not identified in scope of work or work plan are not reimbursable activities.

48) National Enforcement Campaigns
   All agencies utilizing overtime enforcement funds from OTSO are required to participate in the “Click It or Ticket” (CIOT) mobilization and the “Drive Sober or Get Pulled Over” (DSOGPO) alcohol crackdown.
Terms and Conditions

49) Press Releases
In addition to the grant award press release, OVI Task Forces are required to conduct three press conference events (one in coordination with DSOGPO), promote the task force through press releases and publicize checkpoints as required by law.

51) Monthly Enforcement Reports
Whether or not a sub-grantee conducts grant-related activity, each sub-grantee must submit an enforcement report monthly. The monthly enforcement report must be submitted online to OTSO by the 15th calendar day of the following month. Failure to submit these reports in a timely manner will cause a delay in payment of claims, may jeopardize funding for present and future projects and may result in being placed in “Sub-grantee on Notice” status.

Check the box next to Terms and Conditions on the Pre-Activity form.
OVI TASK FORCE

GRANTS System
Report, Reimbursement Claim and Revision Process

NOTE: Must use Internet Explorer
Monthly Enforcement Report

• A monthly enforcement report is due for each month. Even if there is no grant activity, a report must be submitted.

• Each monthly enforcement report is broken down into two forms:
  • Enforcement Activity
  • Sobriety Checkpoint Activity

• Each monthly enforcement report is due the 15\textsuperscript{th} of the following month (example: October enforcement report is due November 15\textsuperscript{th}).
Progress Reports

1. Progress reports will be listed in the drop down under Progress Reports. Reports will be in the drop down the first day of the reporting period. (Ex. May Enforcement Report will be in the drop down May 1st).

2. The date listed after the report name is the date the report is due. If a report is past due, you will not be able to submit a claim (or re-submit a claim that was sent back for modifications).
Monthly Enforcement Reports

To initiate the report:

1. Select the report from the drop down menu.
2. Click the “Create” button.
1. General Information Box lists the report title, the current status of the report, the due date of the report and the period that this report covers.

2. Final Report: Default is “no”. This is correct until the last enforcement report for the year (September). If you tell the system “yes”, the system will not generate additional enforcement reports.

Enforcement Report

Click on Enforcement Report to begin filling out the forms.
Enforcement Report – Blitz Activity

1. To report Blitz Activity, select the correct blitz from the dropdown (do not check the non-blitz box).
2. Enter the number of days the project was in operation. (Ex. If the project only ran from October 15 – 20, then enter 6)
3. Enter the locations where activity was conducted.
4. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant between **6am and 6pm**.
5. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant between **6pm and 6am**.
6. Highlight – List any activity highlights that occurred during the month.
7. Click “Save”.

If you do not have any activity for the month to enter on this form, do not click in any field. Click “Next”. Once you click in any field, however you must complete each box with a *.
Enforcement Report – Blitz Activity Cont.

1. After clicking “Save” the YTD totals will self-populate.
2. To report another Blitz Activity, click “Add” to get a blank report then repeat steps 1 – 7 on the previous slide. To report non-blitz, click “Add” to get a blank report and follow the steps on the next slide.
## Enforcement Report – Non-Blitz Activity

1. To report Non-Blitz Activity, check the Non-Blitz box (do not select a blitz).
2. Enter the number of days the project was in operation. (Ex. If the project only ran from October 15 – 20, then enter 6)
3. Enter the locations where activity was conducted.
4. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant **between 6am and 6pm**.
5. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant **between 6pm and 6am**.
6. Highlight – List any activity highlights that occurred during the month.
7. Click “Save”.
8. Once all Blitz and non-blitz activity have been entered, click “Next”.

---

<table>
<thead>
<tr>
<th>Monthly Totals</th>
<th>6am-6pm</th>
<th>6pm-6am</th>
<th>YTD Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>DVT Arrests under 21</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DVT Arrests 21 and over</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refusals</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adult Restraint Citations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Restraint Citations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speed Citations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distracted Driving Citations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DUS Arrests</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Operators License Citations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Felony Arrests</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Citations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enforcement Hours Worked</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of Traffic Stops</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

If you do not have any activity for the month to enter on this form, do not click in any field. Click “Next”. Once you click in any field, however you must complete each box with a *.
Sobriety Checkpoint

1. Enter the site.
2. Enter the jurisdiction the checkpoint is in.
3. Enter the date the checkpoint started.
4. Select Checkpoint Timeframe — Daytime (6am – 6pm) or Nighttime (6pm – 6am).
5. Enter the Start and End time (include pre-check point meeting through tear down).
6. Enter the agencies participating in the checkpoint.
7. Enter the number of officers that worked the checkpoint.
8. Enter the number of hours that are being reimbursed on the grant.
Sobriety Checkpoint Cont.

8. This column is for activity that was done at a checkpoint on this grant.
9. Highlight – List any activity highlights that occurred at the checkpoint.
10. Click “Save”.

If you did not have a checkpoint, do not click in any field. Click “Next”. Once you click in any field, however you must complete each box with a *.
Sobriety Checkpoint

1. After hitting save, allow the page to process, once it has processed the YTD figures will self-populate.
2. If you need to enter another form, hit “Add” and repeat steps 1 - 10 on the previous two slides.
3. If you are done entering sobriety checkpoint activity, click “Next”.

Note: If a checkpoint is set up in one location, tore down, moved and set up in another location that counts as two different checkpoints. You need to complete two checkpoint forms.
Enforcement Report Attachments

Use this form to attach documents to your enforcement report (press releases, news articles, etc.). Do not attach claim related documentation to your report.

1. Give a brief description of the document.
2. Click “Browse” to search your computer for the file.
3. Click “Save”.
4. Click “Add” and repeat steps 1 – 3 to add additional attachments.
5. When done adding attachments, click “Report Menu”.

NOTE: When attaching PDFs, make sure the file name does NOT include any special characters (&, #, %, etc.)
Enforcement Report Menu

1. When you are certain all data has been entered accurately and completely, click “Check Errors” to see if there are any system errors to fix prior to submitting.
2. If you would like a PDF of the report to print or save to your computer, click “Generate Full PDF”.
3. If there are no errors, click the “Submit” button.
Report Submitted

Once your report is successfully submitted, you will see a confirmation at the top of the screen and the status will change in the General Information box.

Click “Grant Menu” to return to the Grant.
Narrative Progress Report

- A narrative progress report is required for each quarter. It is due the 15th of the month following the end of the quarter. (Example: The first quarter (October – December) is due January 15th.)
Narrative Progress Reports

To initiate the report:

1. Select the report from the drop down menu.

2. Click the “Create” button.
Narrative Progress Report Menu

1. General Information Box lists the report title, the current status of the report, the due date of the report and the period that this report covers.

2. Final Report: Default is “no”. This is correct until the last narrative report for the year (July - September). If you tell the system “yes”, the system will not generate additional narrative reports.

Narrative Progress Report

Click on Alcohol-Related Fatal Crash Goal Progress to begin filling out the forms.
Alcohol-Related Fatal Crash Goal Progress

The report pulls forward your goal, baseline and evaluation from your grant.

1. Using your evaluation as a guide, enter the current status of the goal. Example: This quarter we had 1 alcohol-related fatal crash. Last year we had 2 alcohol-related fatal crashes during the same time frame.
2. Click “Save.”
3. After the page has processed (saved), click “Next”.
Checkpoint Goal Progress

The report pulls forward your goal, baseline and evaluation from your grant.

1. Using your evaluation as a guide, enter the current status of the goal. Example: Conducted 2 checkpoints this quarter for a YTD total of 2.
2. Click “Save”.
3. After the page has processed, click “Next”.

![Checkpoint Goal Progress Image]
Other Grant Related Information

1. Enter any accomplishments during this quarter.
2. Enter any training conducted during this quarter.
3. Enter any Public Information & Education efforts during this quarter.
4. Enter any partnerships made this quarter.
5. Enter any challenges that occurred this quarter.
6. Enter any legislation during this quarter.
7. Click “Save”.

Note: If there was no activity in any of these fields for the quarter, enter none or n/a.
Other Grant Related Information

After the page has been saved, click “Report Menu”.

![Report Menu Image]
Narrative Progress Report Menu

1. When you are certain all data has been entered accurately and completely, click “Check Errors” to see if there are any system errors to fix prior to submitting.
2. If you would like a PDF of the report to print or save to your computer, click “Generate Full PDF”.
3. If there are no errors, click the “Submit” button.
Report Submitted

Once your report is successfully submitted, you will see a confirmation at the top of the screen and the status will change in the General Information box.

Click “Grant Menu” to return to the Grant.
Annual Report

- A final comprehensive annual project activity report must be submitted to OTSO by October 15, 2016.
  - Final reports not received by November 1 will result in a 10 percent penalty deduction to the final claim reimbursement.
  - If a final project activity report is received after November 15, the final claim will not be reimbursed.
- The annual report will be available in the GRANTS System by August 31, 2016.
Annual Report

To initiate the report:

1. Select the report from the drop down menu.
2. Click the “Create” button.
Annual Report Menu

1. General Information
   Box lists the report title, the current status of the report, the due date of the report and the period that this report covers.

2. Final Report: Default is “no”. Change to “Yes”.

Click on Alcohol-Related Fatal Goal Results to begin filling out the forms.
Alcohol-Related Fatal Goal Results

The report pulls forward your goal and baseline from your grant.

1. Using the goal, enter the end result compared to the goal. Ex: This year we had 1 alcohol-related fatal crash exceeding our goal of 2. We were able to exceed our goal due to the concentration of enforcement in our problem areas or we have had 4 alcohol-related fatal crashes; we did not meet our goal of 2. We did not meet our goal because we had more alcohol related motorcycle fatal crashes this year.

2. Click “Save”.

3. After the page has processed, click “Next”.

---

Photo of a computer screen showing the GRANTS system interface with fields for entering alcohol-related fatal crash goal results.
Checkpoint Goal Results

The report pulls forward your goal and baseline from your grant.

1. Using the goal, enter the end result compared to the goal and why or why not. Ex: This year we conducted 18 checkpoints, exceeding our goal of 16. We were able to conduct additional checkpoints because XXXX. Or we conducted 15 checkpoints; we did not meet our goal of 16. We did not meet our goal because XXXXX.
2. Click “Save”.
3. After the page has processed, click “Next”.

[Image of the checkpoint goal results interface]

1. Enter the end result.
2. Click “Save”.
3. Click “Next”.

Instructions: Please provide the following information and click Save. Required fields are marked with an *.

Example: If goal was to conduct 16 checkpoints, enter the number of checkpoints conducted for the grant period. If did not meet the minimum number of checkpoints, explain why.

For additional instructions, please click the Help icon in the upper right hand corner of the page.
Other Grant Related Information

1. Describe any partnerships made during the grant year.
2. List any other funding or in-kind resources that were obtained during the grant year.
3. Describe any challenges during the grant year and how they were resolved.
4. Describe any highlights or noteworthy activities that happened during the grant year.
5. Click “Save”.
6. After the page has been saved, click “Report Menu”.

Instructions:
For additional instructions, please click the Help icon in the upper right hand corner of the page.

Upload/Download Data to/from this page
Annual Report Menu

1. When you are certain all data has been entered accurately and completely, click “Check Errors” to see if there are any system errors to fix prior to submitting.
2. If you would like a PDF of the report to print or save to your computer, click “Generate Full PDF”.
3. If there are no errors, click the “Submit” button.
Report Submitted

Once your report is successfully submitted, you will see a confirmation at the top of the screen and the status will change in the General Information box.

Click “Grant Menu” to return to the Grant.
Once the report has been submitted to our office, it goes through a review process.

The report will be under “Progress Report Submitted” until the review is complete.

If it is approved, it will be under “Progress Report Approved”.

If it is sent back for modifications, you will receive an email and it will be under “Progress Report Modification Required”.

Log into the GRANTS System to make the modifications.

Note: If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.ohio.gov are being blocked as spam.
Report Modifications

1. On the Start Menu, under the Task List, any items that need modifications will be listed.
2. Click on the link for the report you want to modify.
Report Modification

1. Modifications that are required will be listed on the Report Menu outlined in a red box.
2. Complete the changes, return to the Report Menu and click “Submit” to re-submit the report.

Check the box next to Report Process on the Pre-Activity Form.
Reimbursement Claim Process

• Reimbursement claims will be due either the 15th of the following month for monthly claims (Example: October claim will be due November 15th) or the 15th of the month following the end of the quarter (Example: First quarter claim (October – December) will be due January 15th).
• Verify your claim schedule selection on the Pre-Activity Form. New sub-grantees must submit claims monthly.
• Reimbursement claims can include previous activity but cannot go beyond the current claim period. (Example: The December claim can include a November expense, but not a January expense).
• If there is no activity, you must submit a zero claim.
1. Reimbursement Claims will be listed in the drop down under Reimbursement Claims. Claims will be in the drop down the first day of the claim period. (Ex. May Claim will be in the drop down May 1st).

2. The date listed is the date the claim is due. If a progress report is past due, you will not be able to submit a claim (or re-submit a claim that was sent back for modifications).

Only one claim can be processed at a time. The next claim will not show up in the drop down until the previous one has been approved.
Reimbursement Claim Process

To initiate the reimbursement claim:

1. Select the claim from the drop down menu.

2. Click the “Create” button.
Reimbursement Claim Process

1. The Expense Summary Page shows grant information.

2. Budget Information

3. Previous Expenses will show after the first claim has been approved.

4. Budget Remaining (Award – Previous Claim)

5. Current Period Expenses (once you add Expense Detail items these fields will self-populate).

Every time a subsequent claim is initiated, the previous expenses and budget remaining will update to include all previous approved claims.

6. Click the “Edit” button.
Reimbursement Claim Process

1. Unless it is the final claim for the year, select “No” for Final Report. If you select “Yes” the system will not issue any more Reimbursement Claims.

2. Enter the reporting period. Typically it would be the beginning of the month (or quarter) to the end of the month (or quarter). However, if you need to claim an expense from a previous reporting period you will need to make the beginning date the date of the earliest expense. (Ex. November claim would normally be 11/1/2015 to 11/30/2015. If you have an invoice from 10/17/2015 to claim, the reporting periods would be 10/17/2015 to 11/30/2014).

3. Comments – If you have any comments/notes you would like the OTSO review team to see regarding your reimbursement claim, enter them here.

4. Click the “Save” button.

5. Click the “Expense Detail” tab.
Reimbursement Claim Process

Use this screen to enter each expense for the reimbursement claim. The fields required for each expense will change based on the budget category selected.

1. Select the budget category from the drop down. Make sure you are putting the expense in the appropriate category. (Ex. If you received approval to purchase an item using the Supplies and Materials category, select that category here. Do not select another category).

Wait for the page to refresh.
Reimbursement Claim Process

Direct Labor

1. Item: Not required

2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.

3. Name/Title – Enter the Employee’s Name and Title.

4. Begin Date/End Date – Enter the beginning date and ending dates of the labor that is being claimed.

5. Activity Description – If claiming for coordination, mark the activity coordination. If claiming for checkpoint, mark the activity checkpoint. If claiming for saturation patrols, mark the activity saturation patrols. If claiming for education, mark the activity education. If you have a person that worked a combination of these activities on the same date range, break the hours out in the activity description. (Ex. Saturation patrols – 4 hours. Checkpoint 4 hrs.)

6. Check Number – Enter either a check number if the person was paid with a check, or enter DD or EFT if the person was paid with Direct Deposit.

7. Enter the number of hours for that date range.

8. Enter the actual hourly rate the employee was paid, not the rate entered in the proposal.

9. Click the “Save” button.

NOTE: OTSO only pays for OT that has been paid out to the employee. Comp Time is not allowable.
Reimbursement Claim Process

Once saved, the information will self-calculate and appear below the Add an Expense Item Box. As you continue to add expenses, they will continue to appear at the bottom.

1. Select another budget category from the drop down and wait for the page to refresh to continue adding line items to the reimbursement claim.
Reimbursement Claim Process

Labor Fringe Benefits

1. Item: Not required

2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.

3. Date Worked/End Date – Enter the date range to cover the direct labor worked in the claim.

4. Description – Enter “Fringe”.

5. Fringe Calculation – enter the amount of fringe you are claiming.

6. Click the “Save” button.

Note: Make sure you are claiming the actual amount of fringe that is being paid. Ex: If Worker’s Comp was 2.4% when you submitted the proposal and your agency is actually paying 1.7%, you can only claim 1.7%.

Note: You cannot claim a higher percentage than you have been approved for in the grant. Ex: If you were approved for 21.75%, you cannot claim 24.5% without having a revision approved. You can claim less than you were approved for.
Reimbursement Claim Process

Other Direct Costs

1. Item: Not required, however if you have different line items in this budget category, select the correct line item.

2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.

3. Name/Description – Enter the name and a description of the item.

4. Enter the invoice date for the item.

5. Enter the Check or Warrant number used to pay for the item.

6. Enter the cost of the item.

7. Click the “Save” button.
Reimbursement Claim Process

Supplies and Materials

1. Item: Not required, however if you have different line items in this budget category, select the correct line item.

2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.

3. Name/Description – Enter the name and a description of the item.

4. Enter the invoice date for the item.

5. Enter the Check or Warrant number used to pay for the item.

6. Enter the cost of the item.

7. Click the “Save” button.
Reimbursement Claim Process

Contractual Services

1. Item: Not required, however if you have different line items in this budget category, select the correct line item.

2. Budget Column: Select from the drop down. This will show how much you have remaining in the budget category.

3. Name/Description – Enter the name and a description of the item. If the item is for Participating Agency’s Contractual Labor, you do not need to enter each officer. Enter the Agency’s Name and an activity description. (Ex. ABC PD – 10 hours checkpoint; 20 hours saturation patrol).

4. Enter the activity date for the item. If the activity dates span a month period, put the last day of the month.

5. Enter the Check or Warrant number used to reimburse the participating agency.

6. Enter the cost of the item. If it is for a Participating Agency – enter the total paid to the agency for Labor only – do not include fringe.

7. Click the “Save” button.
Reimbursement Claim Process

Contractual Fringe Benefits

1. Item: Not required

2. Budget Column: Select from the drop down. This will show how much you have remaining in the budget category.

3. Date Worked/End Date - Enter the date range to cover the contractual labor worked in the claim.

4. Description – Enter the participating agency’s name, the amount of labor and the fringe percent.

5. Fringe Calculation – Enter the amount of fringe paid to the participating agency.

6. Click the “Save” button.

Note: You cannot claim a higher percentage than was approved for in the grant. Ex: If ABC Police Department was approved for 21.75%, you cannot claim 24.5% without having a revision approved. You can claim less than you were approved for.
Reimbursement Claim Process

Travel Expense

1. Item: Not required, however if you have different line items in this budget category, select the correct line item.

2. Budget Column: Select from the drop down. This will show how much you have remaining in the budget category.

3. Date – Enter the invoice date for invoiced items (airline tickets, registration, etc.). Enter the last travel date for other travel expenses (hotel, meals, parking, etc.). Each expense type needs to be listed separately.

4. Description – Enter a description of the expenses.

5. Amount – Enter the amount.

6. Click the “Save” button.

NOTE: New for FFY 2016 - All out of state travel conducted under this grant agreement will be reimbursed using U.S. General Services Administration (GSA) rates based on travel location or your agency’s travel policy whichever is less.
Reimbursement Claim Process

Once all entries have been made, review for accuracy.

If you find an expense line that has an error:

1. Click the radio button next to the item that needs correction.

2. If the entire line needs deleted (duplicate entry or incorrect budget category), click “Delete”.

3. If you just need to make changes, click “Edit”.

[Diagram of reimbursement claim process]

[Image of reimbursement claim process interface]
Reimbursement Claim Process

After you click edit, the top box will populate with the information previously entered.

1. Make the necessary changes and click the “Save” button.

2. When you are certain all expenses have been entered accurately and completely, click the “Expense Summary” tab.
Reimbursement Claim Process

If you need to attach documentation to support charges in the reimbursement claim (invoices, task force invoices, travel receipts, etc.), click the “Claim Attachments” tab.
Reimbursement Claim Process

Click “Add”.

![Image of GRANTS software interface showing 'Add' button to manage claim attachments.](image-url)
Reimbursement Claim Process

1. Enter the title of the attachment. (Example: Travel Receipts)
2. Click “Browse” to locate the file on your computer.
3. Once the document is showing in the file path, click “Save”.

NOTE: When attaching PDFs, make sure the file name does NOT include any special characters (&, #, %, etc.)
Reimbursement Claim Process

1. If you need to attach additional documentation, click “Add” and follow steps 1 – 3 on the previous slide.
2. Once you have attached all documentation, click “Back to Claim”
Reimbursement Claim Process

The Current Period Expenses have now been totaled from the entries.

1. Click “Check for Errors” to see if there are any system errors to fix prior to submitting.

2. If there are no errors, click the “Submit” button.

Reminders:
- You cannot submit a reimbursement claim if you have progress reports that are past due.
- You cannot submit a reimbursement claim until the costs have been paid.

You will be asked to enter your password.
Reimbursement Claim Process

• Once the claim has been submitted to our office, it goes through a review process.

• The claim will be under “Submitted/Review Required” until the review is complete.

• If it is approved, it will be under “Approved”. OTSO normally processes payments weekly (holiday weeks may alter schedule).

• Once the claim has been processed for payment, it will be under “Payment Initiated”.

• Payment should be received 2 – 3 weeks after they have been marked “Payment Initiated”.

• When the check is sent, the claim will be under “Payment Complete”. If you receive a paper check, this means it was put in the mail. If you receive EFT, payment should be in your account.
Reimbursement Claim Process

- If your claim is not approved, it will be under “Modifications Required” and you will receive an e-mail letting you know it has been returned.

- Return to the GRANTS System and the claim will be under your task list. Click on the link.

**Note:** If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.ohio.gov are being blocked as spam.
Reimbursement Claim Modifications

Modifications that are required will be listed on the Expense Summary outlined in a red box.

Click on Expense Detail to make the corrections.

Note: There are limited characters available, check with your planner if the comment is not complete.
Expense Detail Modifications

1. The Comments are still at the top of the screen for reference.
2. Find the line item you need to correct, select the radio button.
3. To make changes to the entry, click “Edit”.
4. To delete the entry, click “Delete”.

[Image of a computer screen showing a claim form with highlighted sections for modifications.]
Expense Detail Modifications

1. The top box will populate with the information previously entered.
2. Make the corrections in the top box.
3. Click “Save”.
4. To make corrections on the claim attachment page, click “Claim Attachments” tab.
5. If all corrections are complete, click “Expense Summary”.

[Diagram of a software interface with various options and fields for expense management.]
Claim Attachment Modifications

1. To modify the current attachment, check the box next to the attachment.
2. To delete, click “Delete”.
3. To edit, click “Edit”.
4. To add additional files, click “Add”.

[Diagram showing steps 1 to 4]
Claim Attachment Edit

1. Change the title, or
2. Attach an updated file by clicking “Browse”.
3. Click “Save”.
Claim Attachment Add

1. Enter the title.
2. Click “Browse” to locate the file on your computer.
3. Click “Save”.

![Claim Attachment Add screen](image.png)
Claim Attachment Modification

When done deleting, editing and adding attachments, click “Back to Claim”.

![Image of GRANTS interface](image-url)
Reimbursement Claim Modifications

Verify that all the corrections mentioned in the Review Comments have been made. If they have, click “Submit”.

[Image of a screen showing a reimbursement claim form with fields for grant information, report information, and expense summary.]
Electronic Reimbursement

Reimbursement can be received electronically by going to:

http://ohiosharedservices.ohio.gov/Suppliers.aspx

Check the box next to Reimbursement Claim Process on the Pre-Activity Form.
Revision Process

All grant revisions must be submitted by September 1, 2016.

To initiate a revision, click “Revise Grant”.
Grant Revision

Once you click “Revise Grant”, you will receive this warning message:

Once a revision has been initiated do not initiate a new reimbursement claim, and any initiated reimbursement claims cannot be submitted until the revision has been fully approved.
Grant Revision

The Budget Overview page has the Justification. All changes you are making to the grant need to be listed in this box. Ex: Moved 20 hours from Christmas to St. Patrick’s Day. Moved $1,500.00 from Supplies and Materials to Other Direct Costs.

If you need to wait until you have made your changes to fill this in, make sure you return to this page when you enter the justification. (It is the only time the “Save” button will appear).
Narrative Page Revisions

To make changes to any Narrative Page (Applicant Assurances, Goals, Work Plans, Budget Worksheet, Participating Agencies), click “Narrative Pages” tab.
Narrative Page Revisions

1. Select the page you want to revise in the drop down and click “go”.

Once it pulls up the information from the grant, you will see the information in two boxes. The bottom box is what was in the grant previously.

2. Make changes in the top box.
3. Click “Save”.

[Diagram of the Narrative Pages interface with steps highlighted: 1. Select a different narrative page to view; 2. Make changes in the top box; 3. Click “Save”.]
Narrative Page Revisions

1. To select another Narrative Page, choose the name and click “go”.
2. If that page has multiple pages, select the one from the drop down and click “go” or click “next” to scroll through.
3. Again, make changes in the top box.
4. Click “Save”.

![Image of Narrative Page Revisions interface](image.png)
Narrative Page Revisions

1. If the only revisions that were needed were on narrative pages and you have completed the Justification Box, click “Submit Revisions”.
2. If you need to make revisions in the budget or still need to complete the Justification box, click the “Budget” tab.
Grant Revision

1. If you need to make revisions in the budget, click on the link under budget overview.
2. If the only revisions that were needed were on narrative pages, complete the Justification Box.
3. Click “Save”.
4. Click “Check for Errors” to see if there are any system errors to fix prior to submitting.
5. Click “Submit Revisions”.
Budget Revisions

Once it pulls up the information from the grant, you will see the information in two boxes. The bottom box is what was in the grant previously. Changes must be made in the top box.

To make changes to the line item amount only:

1. Check the box next to the line item.
2. Click “Edit”.

Budget Revisions

1. Change the amount.
2. Click “Save”.
Budget Revisions

To revise the budget amount and the description:

Click the link for the line item.
Budget Revisions

1. Make the changes in the description and/or the amount.
2. Click “Save”.
3. After saving, click “Budget Detail” to return to the budget.
Budget Revisions

To add a new item in the budget:

Click “Add Budget Item”.
Budget Revisions

1. Select the Budget Category from the drop down.
2. Enter a short description on this line (the title of the item).
3. Enter a more detailed description.
4. Enter a quantity if applicable.
5. Enter the amount.
6. Click “Save”.

Continue adding additional items, until all new items have been added.

7. Click “Budget Detail” to return to the Budget.
Budget Revisions

On the Budget Detail Page, review all line items on the top section to ensure all changes have been made. When done, click “Budget Overview”.
Grant Revisions

1. Complete the Justification Box. Make sure all changes (both narrative and budget) are listed in the justification.
2. Click “Save”.
3. Compare the Budget Overview to the Previous Budget Overview to ensure that the budget has not increased (unless you have prior approval to increase your budget) or decreased (unless you wish to decrease the budget).
4. Click “Check for Errors” to see if there are any system errors to fix prior to submitting.
5. Click “Submit Revisions”.
Grant Revisions

- Once the revision has been submitted to our office, it goes through a review process.

- The grant will be under “Grant Revision Review Required” until the review is complete.

- If it is approved, the grant status will update to “Grant Revised”.

[Image of a grant application screen with highlighted fields and options.]
Grant Revision Modifications Required

If your revision is not approved, it will be under “Grant Revision Modifications Required” and you will receive an e-mail letting you know it has been returned.

Return to the GRANTS System and the claim will be under your task list. Click on the link.

**Note:** If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.state.oh.us are being blocked as spam.
Grant Revision Modifications Required

From the Grant Menu, click on “View Revisions”.

[Image of the Grant Management System interface with a highlighted link for "View Revisions"]
Grant Revision Modifications Required

Modifications that are required will be listed on the Budget Overview under Modifications Required.

Follow the steps on slides 106-119 to make the required changes and re-submit the revision.

Check the box next to Revision Process on the Pre-Activity form.
Controlling Access to Grant

To change/add personnel to the grant:

Click “Grantee Contact Information”.

[Image of a webpage showing the option to click on “Grantee Contact Information” on a grant management system.]
Controlling Access to Grant

The people who were added to the proposal are automatically transferred to the grant.

If you need to make changes to the existing contact type or level of access:

1. Click the radio button next to the name.
2. Click the “Edit” button and make the necessary changes.
Controlling Access to Grant

1. Make the change to either the Contact Type or the Level of Access.

   **Contact Types**

   **Authorizing Official** – The authorizing official is usually the head of an organization/agency. This individual must possess or have the ability to obtain the legislative authority to enter into an agreement with OTSO.

   **Project Director** – The project director is designated as the agency’s liaison with OTSO by the authorizing official. This individual will oversee the daily activities of the grant and ensure that the scope of work, evaluation and work plans are completed as proposed. This individual will also serve as the primary contact person for the grant.

   **Fiscal Officer** – The fiscal officer is responsible for the fiscal activities of the agency. This individual is responsible for overseeing the grant’s budget, as well as submitting properly prepared claims for reimbursement to OTSO.

   **Level of Access**

   **Grant Administrator** – has access to make changes, submit reports and reimbursement claims.

   **Viewer** – Can only view the grant.

2. Click “Save”. 
Controlling Access to Grant

If you need to delete an existing contact from the grant:

1. Click the radio button next to the name.
2. Click the “Delete” button.

This will only remove the person’s access to this grant. It does not remove their access to the GRANTS System. See Slide 131 if you need to deactivate their account.
Controlling Access to Grant

To add additional people:
1. Select the person’s name.
2. Select the Contact Type (Authorized Official, Fiscal Officer, etc.)
3. Select level of access.
4. Click the “Grant This User Access” button.

*Repeat until all necessary people have been added.*

If the person that needs to be added, is not listed in the drop down for Step 1:

5. Click “Agency Info”.

---

![Image of a user interface for controlling access to a grant, with steps outlined in red and blue boxes.](image)
Controlling Access to Grant

To add a new user:

1. If you are the Agency Administrator, click the “Add” button and complete the user information. If you are not the Agency Administrator, have the Agency Administrator complete this step. Then proceed to Step 2.
2. Once everyone that you need to add to the grant is added, click on “Back to Previous Page”.
Controlling Access to Grant

To add additional people:
1. Select the person’s name.
2. Select the Contact Type (Authorized Official, Fiscal Officer, etc.)
3. Select level of access.
4. Click the “Grant This User Access” button. 
   Repeat until all necessary people have been added.

5. Click “Grant Menu” to return to your grant or “Start Menu” to return to your task list.
Controlling Access to GRANTS

To manage user’s access click on “Agency Info”.

1. To edit existing users, click the radio button next to the user’s name.
2. Click “Edit”.
Controlling Access to GRANTS

1. To de-activate the user (they will no longer be able to access the GRANTS System), click the box next to “Active” – this will remove the checkmark.
2. To update address, phone number, email address, etc. – make the change in the appropriate field.
3. Click “Save”.

![Diagram of access control interface]
Agency Information

If the agency information needs updated (address, phone number), click “Edit”.

![Agency Information Form]

<table>
<thead>
<tr>
<th>Agency Information</th>
<th>Service Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>ABC Agency</td>
</tr>
<tr>
<td>Legal Name</td>
<td>ABC Agency</td>
</tr>
<tr>
<td>Type</td>
<td>Community Organization</td>
</tr>
<tr>
<td>Category</td>
<td>Traffic Safety Partners</td>
</tr>
<tr>
<td>Address Street</td>
<td>123 Main Street</td>
</tr>
<tr>
<td>Address continued</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td>Anytown</td>
</tr>
<tr>
<td>State</td>
<td>OK</td>
</tr>
<tr>
<td>Zip Code</td>
<td>33333</td>
</tr>
<tr>
<td>County (Location)</td>
<td>Franklin</td>
</tr>
<tr>
<td>Phone</td>
<td>(335) 555-5555</td>
</tr>
<tr>
<td>Extension</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td></td>
</tr>
<tr>
<td>Main Contact</td>
<td>John Smith</td>
</tr>
<tr>
<td>OAKS Vendor I.D. Number</td>
<td></td>
</tr>
<tr>
<td>Non-Profit</td>
<td></td>
</tr>
<tr>
<td>Muni Code</td>
<td></td>
</tr>
<tr>
<td>Address Code</td>
<td></td>
</tr>
<tr>
<td>Community Population</td>
<td></td>
</tr>
<tr>
<td>AuditorsDistrictCode</td>
<td></td>
</tr>
<tr>
<td>DUNS Number</td>
<td>12-345-6789</td>
</tr>
</tbody>
</table>

**Agency Contacts**

<table>
<thead>
<tr>
<th>First Name Last Name</th>
<th>Requested Agency</th>
<th>Official Agency</th>
<th>System Security Level</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Doe</td>
<td>ABC Agency</td>
<td>Agency Staff</td>
<td></td>
<td>(335) 555-5555</td>
</tr>
<tr>
<td>John Doe</td>
<td>ABC Agency</td>
<td>Agency Staff</td>
<td></td>
<td>(335) 555-5555</td>
</tr>
<tr>
<td>John Smith</td>
<td>ABC Agency</td>
<td>Agency Administrator</td>
<td>(335) 555-5555</td>
<td></td>
</tr>
</tbody>
</table>
Agency Information

1. Make changes.
2. Click “Save”.

Only the fields outlined with a box can be edited. If you need information updated that is not accessible, please email otso@dps.ohio.gov

Check the box next to controlling access to the grant and the GRANTS system on the Pre-Activity form.
Pre-Activity Form Completion

Once you have finished the presentation, reviewed and updated the grant contact information, sign the completed form and fax it to 614-752-4646 or scan and email to otso@dps.ohio.gov

Save this presentation as a user guide throughout the grant year for claims, reports and revisions.
Questions?

If you have any questions, please email your questions to otso@dps.ohio.gov

OTSO will be developing FAQ sheets; please do not hesitate to send questions to the above email address. The FAQ sheets will be developed in part from questions we receive.