OHIO TRAFFIC SAFETY OFFICE

FFY 2016 Safe Communities 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

County	OSP Patrol Post
Allen	Lima
Defiance	Defiance
Fulton	Toledo
Hancock	Findlay
Hardin	Findlay
Henry	Bowling Green
Lucas	Toledo
Paulding	Van Wert
Putnam	Lima
Van Wert	Van Wert
Williams	Defiance
Wood	Bowling Green

Contact Information:
OTSO Planner - Kelvin Williams: 614/466-3250
LEL - Frank Arvay: 419/213-0084
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 2

County	OSP Patrol Post
Crawford	Bucyrus
Erie	Sandusky
Huron	Norwalk
Marion	Marion
Ottawa	Sandusky
Richland	Mansfield
Sandusky	Fremont
Seneca	Fremont
Wyandot	Bucyrus

Contact Information:
OTSO Planner - Kelvin Williams: 614/466-3250
LEL - Frank Arvay**:** 419/213-0084
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 3

County	OSP Patrol Post
Ashland	Ashland
Cuyahoga	Cleveland
Holmes	Wooster
Lorain	Elyria
Medina	Medina
Stark	Canton
Summit	Canton
Wayne	Wooster

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

Contact Information – District 4

County	OSP Patrol Post
Ashtabula	Ashtabula
Columbiana	Lisbon
Geauga	Chardon
Lake	Chardon
Mahoning	Canfield
Portage	Ravenna
Trumbull	Warren

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

Contact Information – District 5

County	OSP Patrol Post
Auglaize	Wapakoneta
Champaign	Springfield
Clark	Springfield
Darke	Dayton
Greene	Xenia
Logan	Marysville
Mercer	Wapakoneta
Miami	Piqua
Montgomery	Dayton
Preble	Dayton
Shelby	Piqua
Union	Marysville

Contact Information:
OTSO Planner - Kelvin Williams: 614/466-3250
LEL – SW LEL
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 6

County	OSP Patrol Post
Delaware	Delaware
Fairfield	Lancaster
Franklin	Columbus
Knox	Mt. Gilead
Licking	Granville
Madison	West Jefferson
Morrow	Mt. Gilead
Perry	Lancaster
Pickaway	Circleville

Contact Information:
OTSO Planner - Jackie Stephenson: 614/466-3250
LEL - Mike Brining: 614/946-2878
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 7

County	OSP Patrol Post
Belmont	St. Clairsville
Carroll	New Philadelphia
Coshocton	Zanesville
Guernsey	Cambridge
Harrison	Steubenville
Jefferson	Steubenville
Monroe	St. Clairsville
Morgan	Marietta
Muskingum	Zanesville
Noble	Cambridge
Tuscarawas	New Philadelphia
Washington	Marietta

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

Contact Information – District 8

County	OSP Patrol Post
Adams	Georgetown
Brown	Georgetown
Butler	Hamilton
Clermont	Batavia
Clinton	Wilmington
Fayette	Wilmington
Hamilton	Cincinnati
Highland	Wilmington
Warren	Lebanon

Contact Information:
OTSO Planner - Jackie Stephenson: 614/466-3250
LEL – SW LEL
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 9

County	OSP Patrol Post
Athens	Athens
Gallia	Gallipolis
Hocking	Athens
Jackson	Jackson
Lawrence	Ironton
Meigs	Gallipolis
Pike	Chillicothe
Ross	Chillicothe
Scioto	Portsmouth
Vinton	Jackson

Contact Information:
OTSO Planner - Jackie Stephenson: 614/466-3250
LEL - Mike Brining: 614/946-2878
OSP Patrol Post: 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 Safe Communities.
- **Reimbursement Claim schedule** – check monthly or quarterly. **New sub-grantees must check monthly.**

Activity Dates

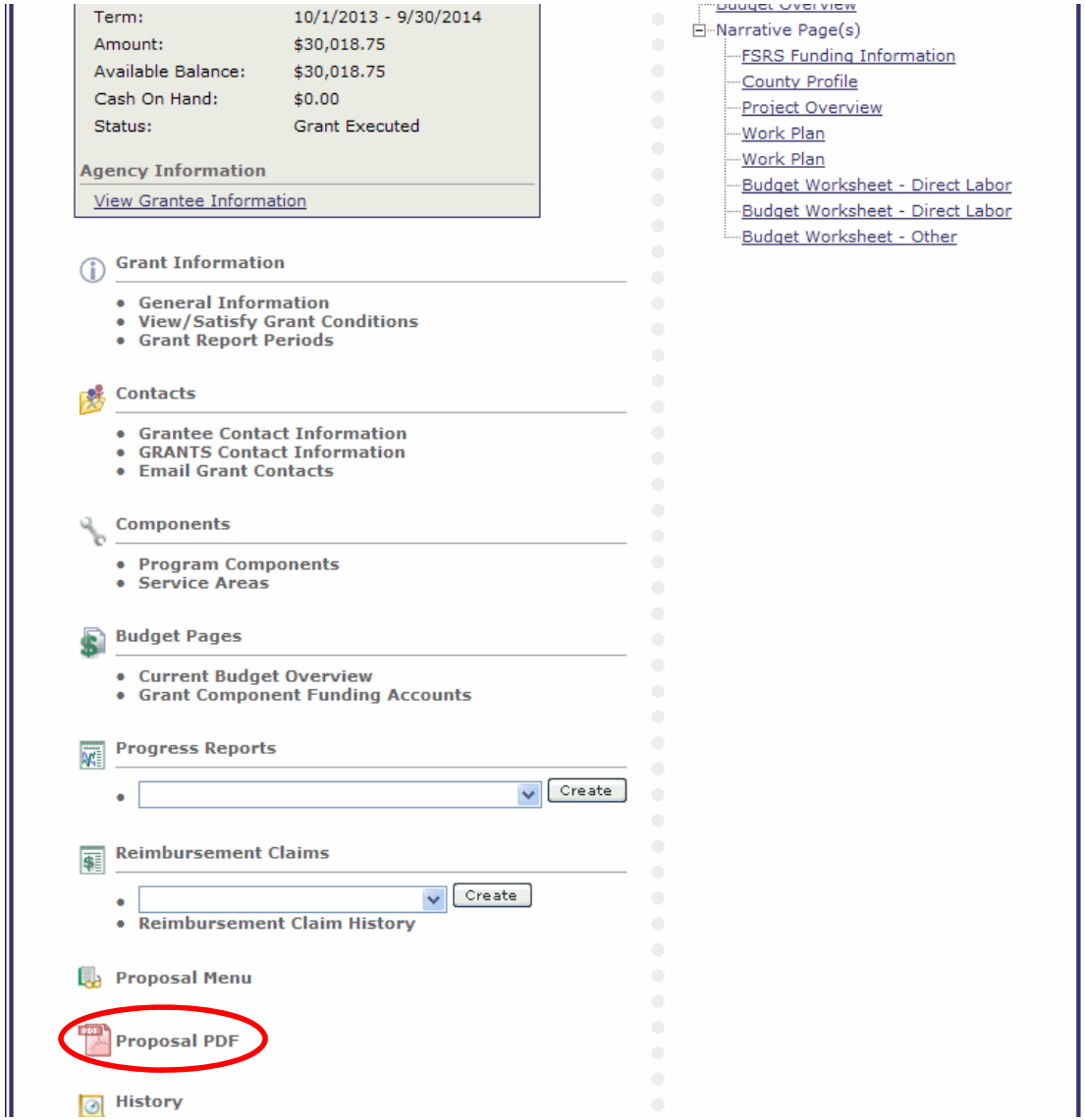
- Beginning Date – Grant period will commence after this required pre-activity presentation has been completed and the authorized to proceed date listed in the Award Letter.

- 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.

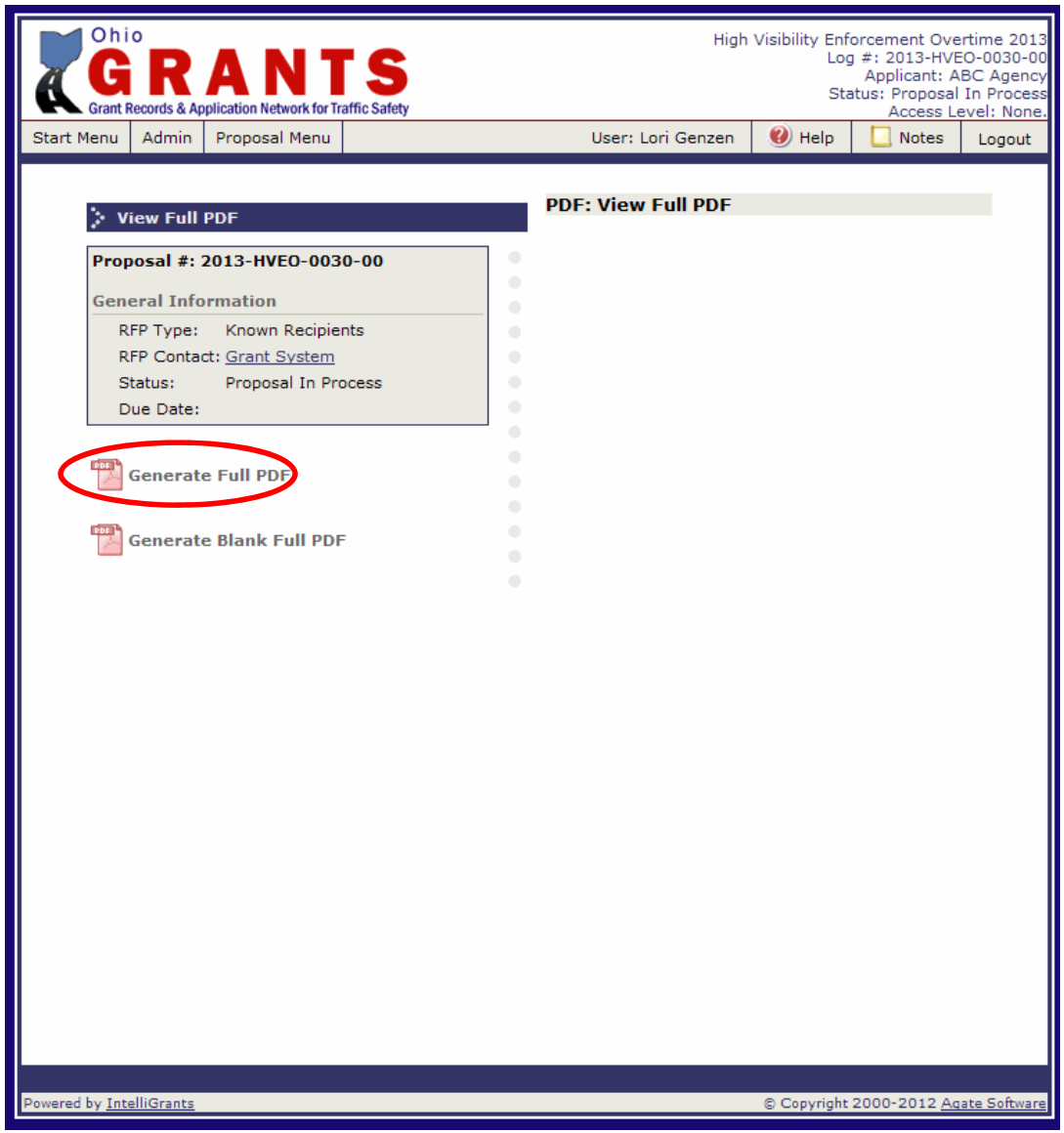
PDF

- 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

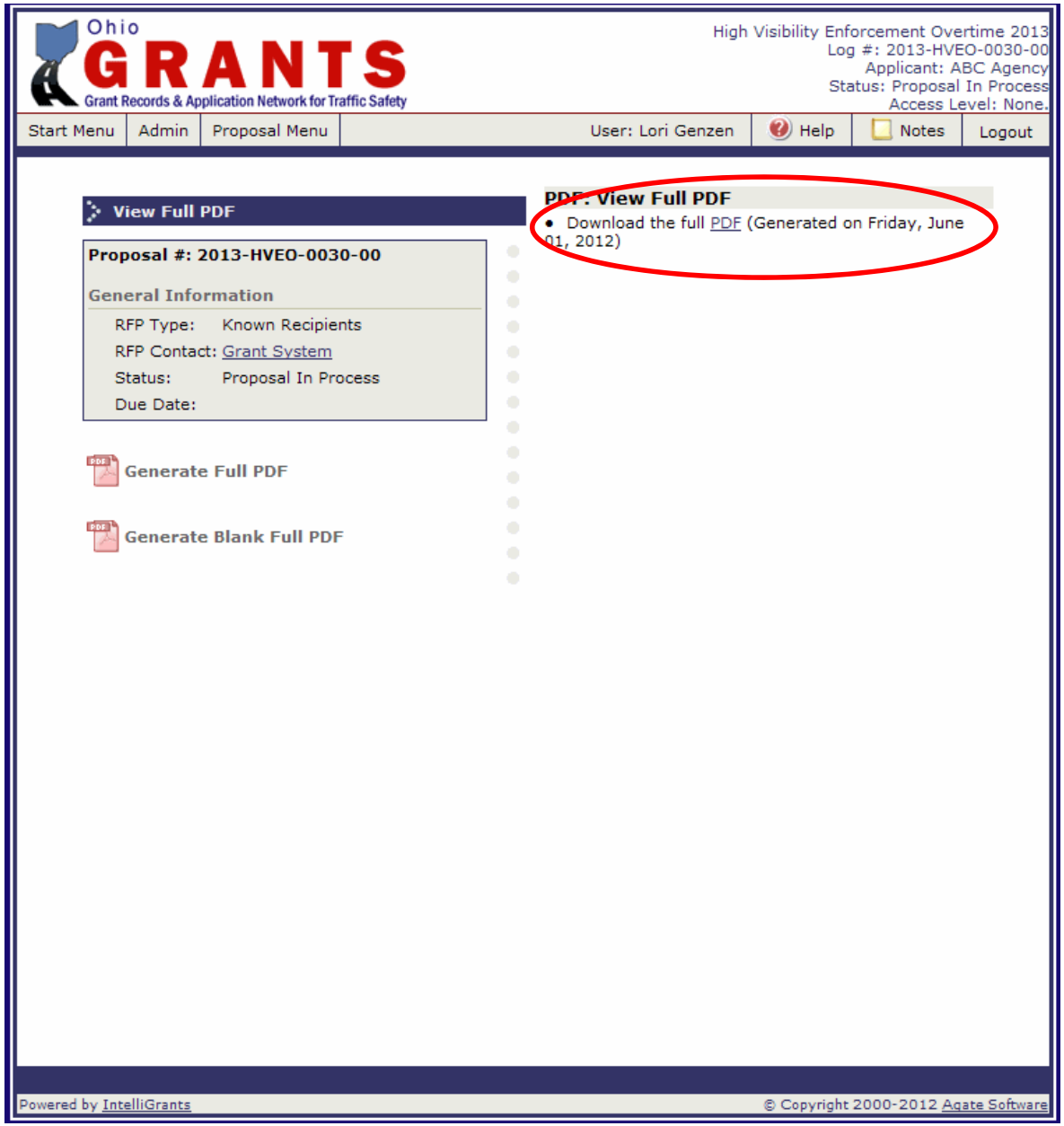
- Click on Generate Full PDF.
- This is an overnight process. The following morning you will receive an email stating that the PDF is ready. It will not be attached to the email.



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, 2106
- Drive Sober or Get Pulled Over: August 19 – September 5, 2016

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

Allowable Costs

- Personnel/Coordination Expenses (Salaries and Wages)
  - The sub-grantee needs to maintain a coordinator (project director) throughout the grant.
- Public Information and Education (PI&E)
- Meetings and Conferences
- 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

- Vehicle Mileage
- Equipment
- Supplies and Materials
- Training
- Contractual Services
- Rate/Cost Allocation Charges

Refer to pages 78 – 81 of the Grant Solicitation Package for details on each cost category.

Unallowable Costs

- Paid Advertising/Public Communications
- Alcoholic Beverages
- Food
- Vehicle Fuel
- Entertainment
- Lobbying
- Office Furnishing & Fixtures
- Central Service Charges

See pages 81 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
  - 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 2015 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.

Terms and Conditions

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 depending on grant type; see Special Conditions for additional requirements.

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 OTSO staff.

Terms and Conditions

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.

Terms and Conditions

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 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.**

Terms and Conditions

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

56) Coalition Meetings

Safe Communities programs must conduct a minimum of four coalition meetings during the grant period. Copies of signature rosters and the coalition meeting agenda must be kept on file and made available during an OTSO grant monitoring visit.

57) Kick-Off Events

Each Safe Communities program is required to coordinate a “Click It or Ticket” and a “Drive Sober or Get Pulled Over” kick-off event. Each Safe Communities must conduct their own event in their own county. The CIOT event must be no earlier than May 16, 2016 and no later than May 27, 2016. The DSOGPO event must be no earlier than August 12, 2016 and no later than August 26, 2016. **These events must include participation, at a minimum, by your coalition members, local law enforcement, community leaders and the media.** Additional participation in an adjacent county’s event will be considered on a case by case basis.

Terms and Conditions

58) Fatal Crash Data Review Committee

A Fatal Data Review Committee will meet in any quarter that a fatality has been reported in the county to review fatal crash reports to identify patterns or trends that could increase impact of traffic safety countermeasures.

59) Reporting of Fatality Information

In order for communities to be kept informed on fatal crashes occurring in their areas, each Safe Communities program is required to report to their local media, at least quarterly, on the fatal crashes occurring in the communities. This notification will be structured similar to a template developed by OTSO. Notification shall be sent to the media no later than the 15th of the month following the ending quarter. For example: Fatalities occurring in October, November and December must be reported by January 15th. Media can include: television, radio, newspapers, etc. Copies of these releases must be kept in file and will be subject to review by OTSO.

Terms and Conditions

60) Monthly Activity Report

Each sub-grantee must submit online monthly reports by the 15th calendar day of the following month.

61) Personnel Activity Reports

Personnel activity reports are required for all individuals working on this federal grant program. These reports, at a minimum, must document date worked, actual activity performed and the number of hours per day to be charged to this agreement. This document must be signed by the individual and his/her immediate supervisor. It must be included as a part of the reimbursement documentation.

62) Self-sufficiency

All Safe Communities programs must work towards self-sufficiency. Efforts to work towards this goal should be reported in activity reports, but as a minimum in the final comprehensive annual activity report.

Terms and Conditions

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

SAFE COMMUNITIES

GRANTS System

Report, Reimbursement Claim and Revision Process

NOTE: Must use Internet Explorer

Narrative Progress Report

Safe Communities are required to submit monthly reports detailing progress on goals, meetings conducted, materials distributed and events/activities conducted during the month.

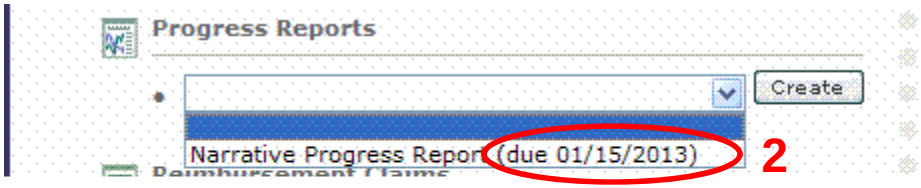
Monthly reports are due the 15th of the following month (Ex: report for October activity will be due November 15th).

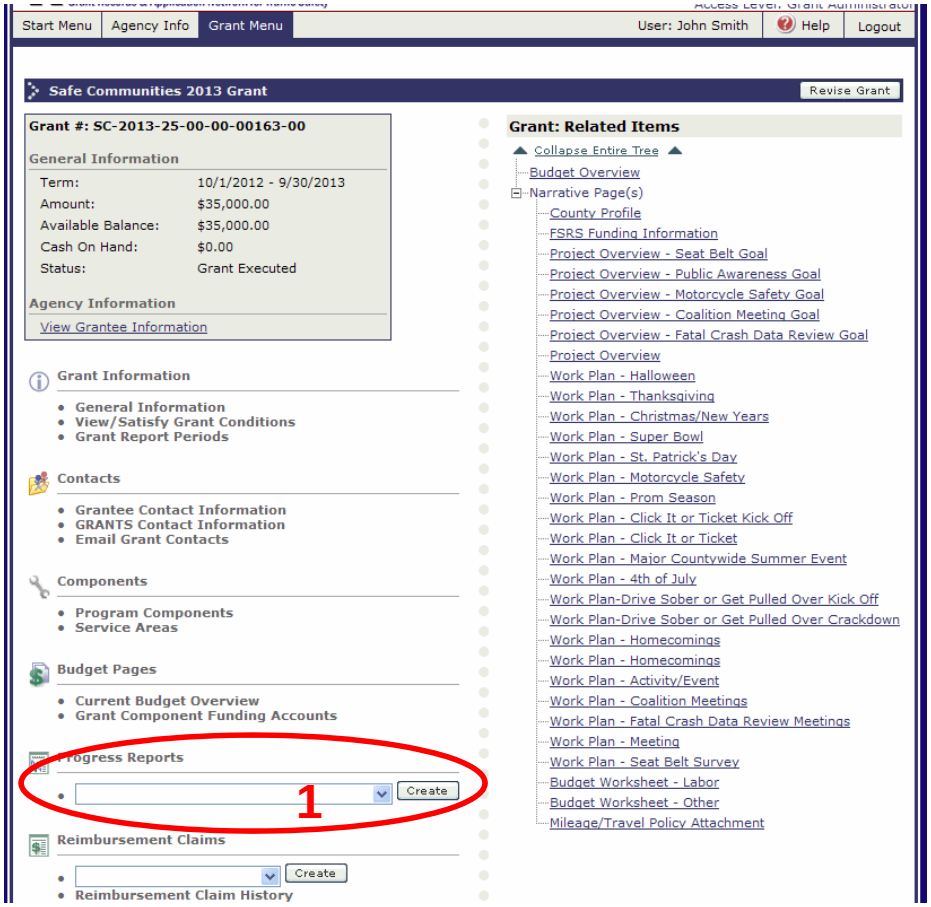
Narrative Progress Reports

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 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).



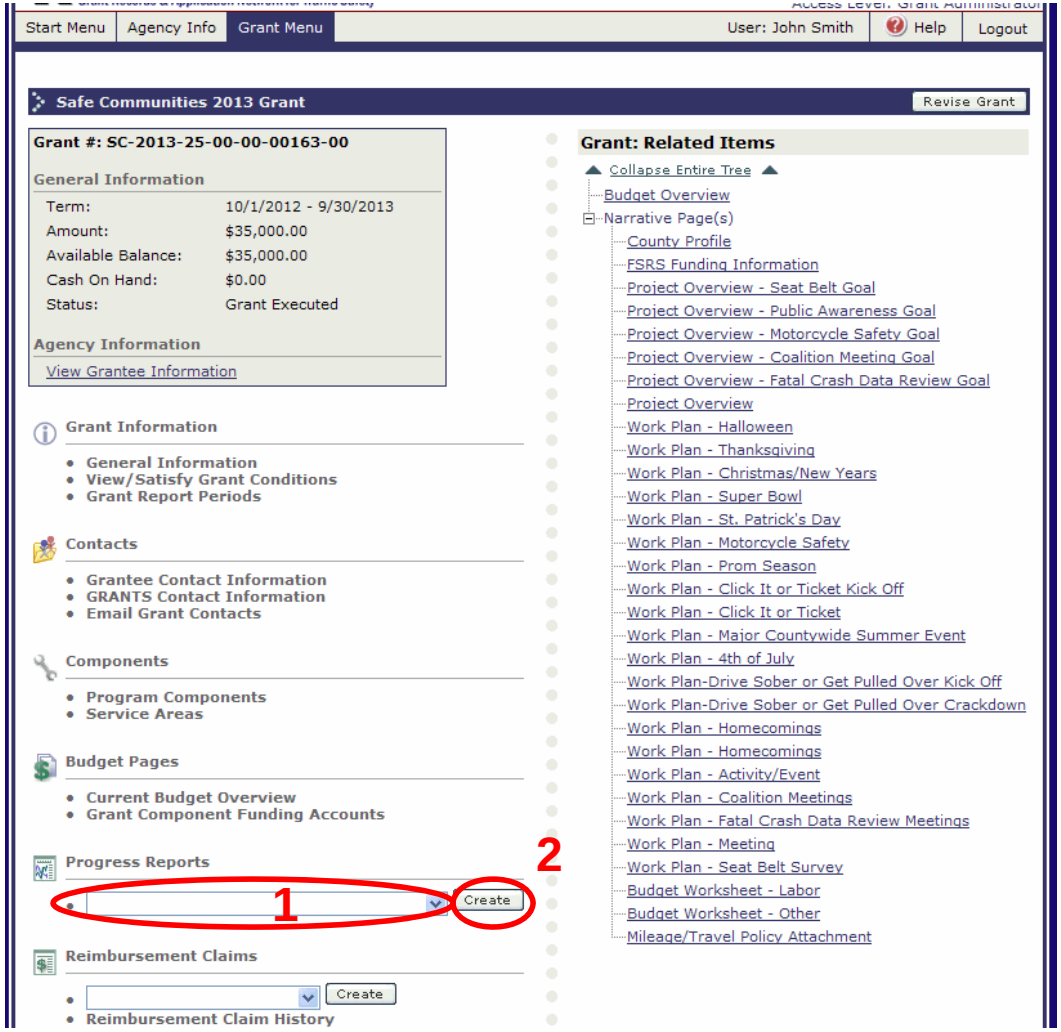


Narrative Progress Reports

To initiate the report:

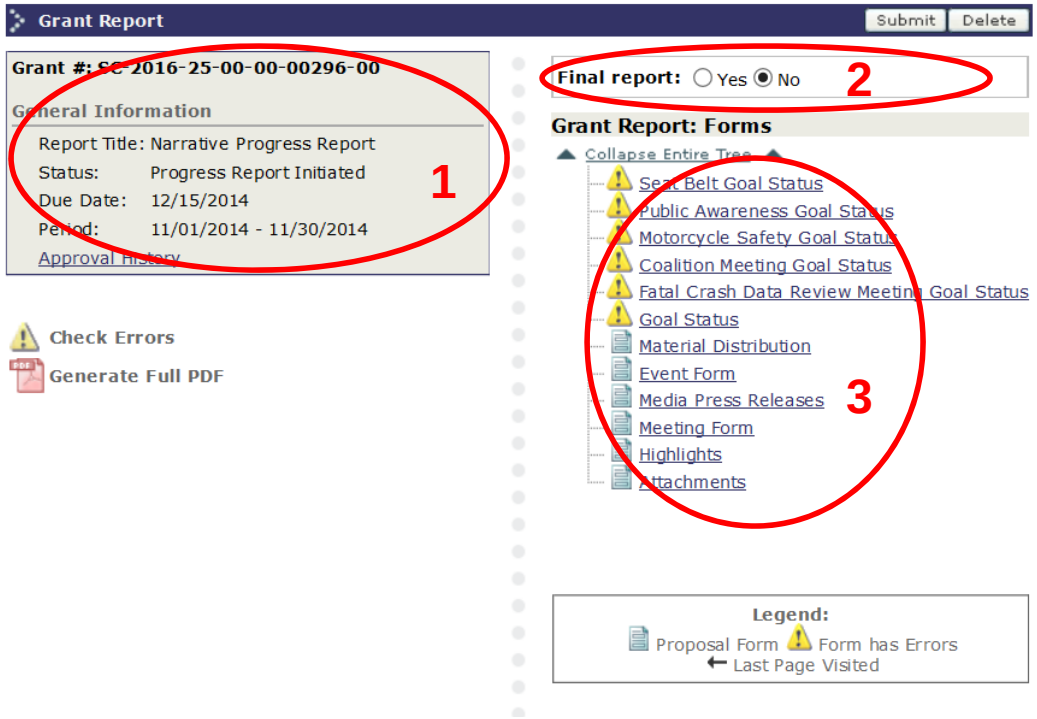
1. Select the report from the drop down menu.

2. Click the “Create” button.



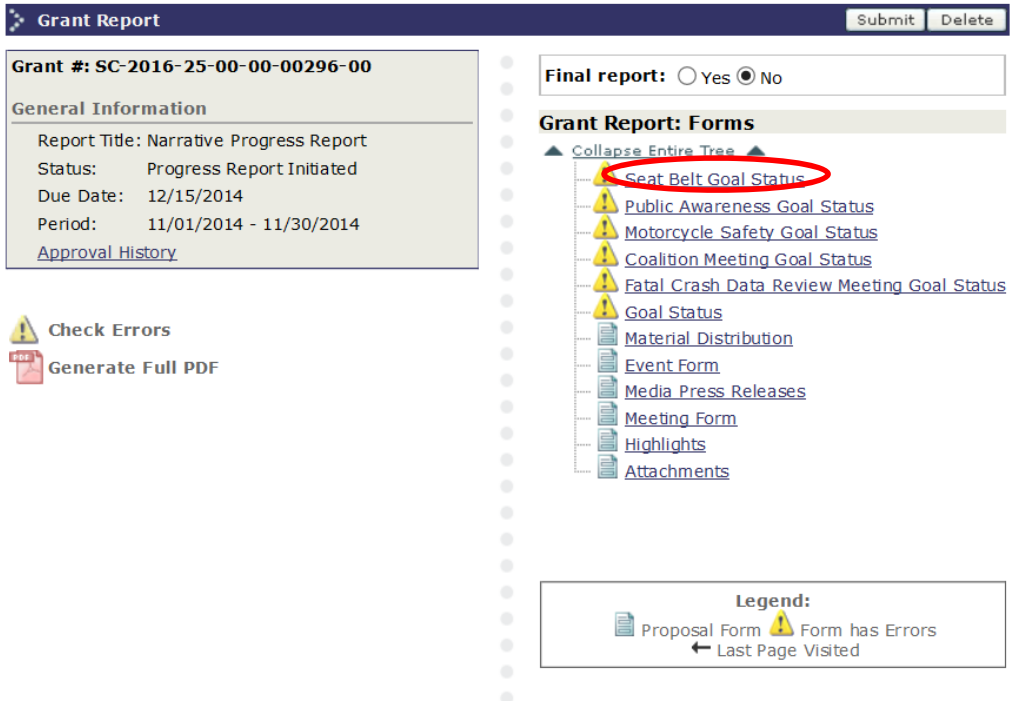
Narrative Progress Report Menu

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 monthly narrative progress report (September). If you tell the system “yes”, the system will not generate additional monthly narrative progress reports.
3. Grant Report Forms: List of all forms in the Narrative Progress Report.



Narrative Progress Report

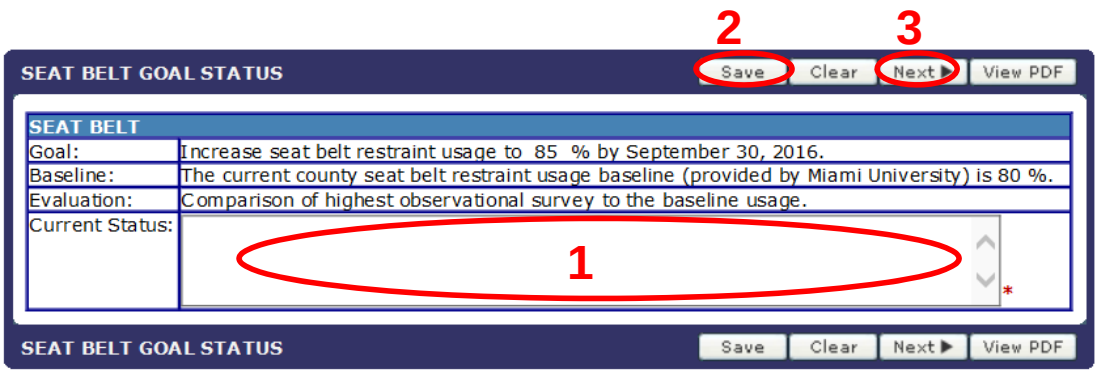
Click on “Seat Belt Goal Status” to begin filling out the forms.



Seat Belt Goal Progress

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

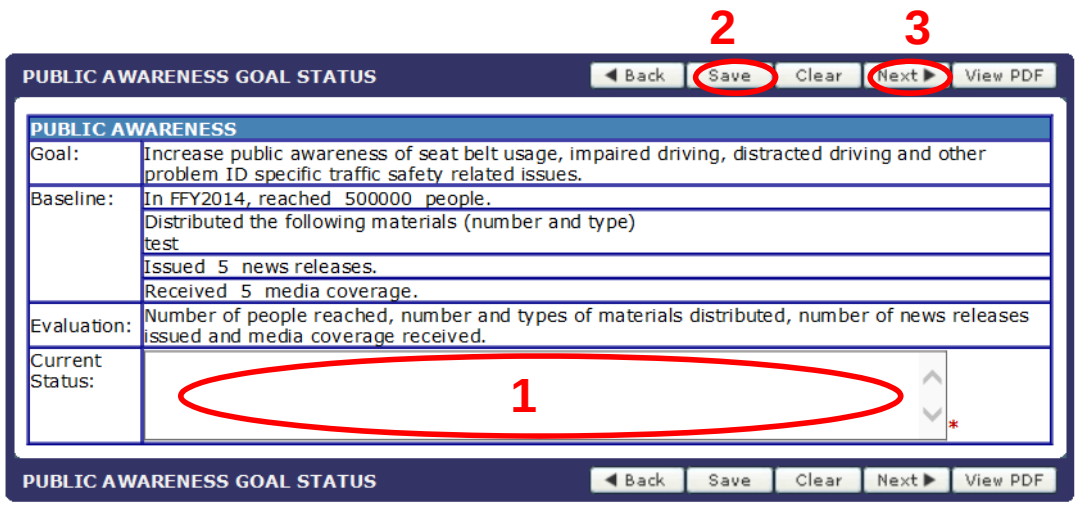
1. Using your evaluation as a guide, enter the current status of the goal. Example: The current seat belt usage rate provided by Miami University is 74% or the seat belt usage rate has not been updated by Miami University as of 10/31/2015 (end of the reporting period).
2. Click “Save”.
3. After the page has processed, click “Next”.



Awareness Goal Progress

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

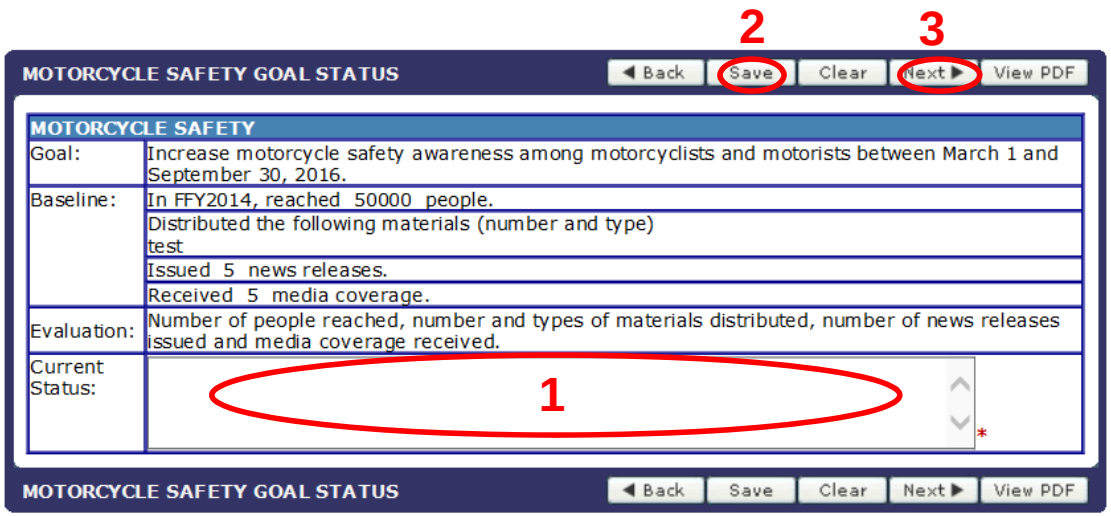
1. Using your evaluation as a guide, enter the current status of the goal. Example: If your evaluation was “Number of people reached, number and types of materials distributed, number of news releases issued and media coverage received” your current status would read “This month we reached 5,432 people; distributed 500 impaired driving posters, 300 distracted driving posters, 1,000 Click It or Ticket magnets; issued 3 media releases and the media covered 1 event.
2. Click “Save”.
3. Click “Next”.



Motorcycle Goal Progress

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

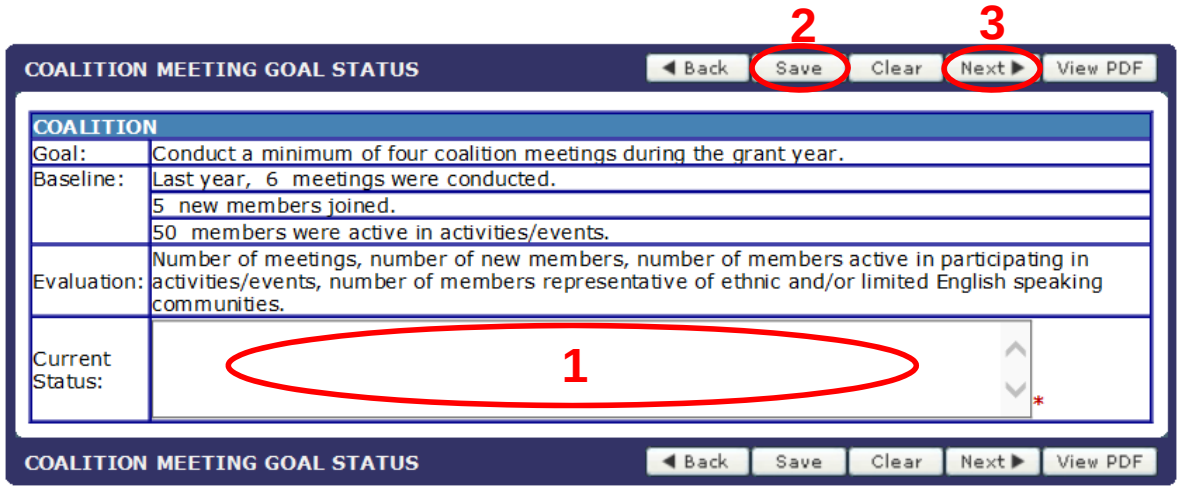
1. Using your evaluation as a guide, enter the current status of the goal. Example: If your evaluation was “Number of people reached, number and types of materials distributed, number of news releases issued and media coverage received” your current status would read “This month we reached 5,432 people; distributed 500 impaired driving posters, 300 distracted driving posters, 1,000 Click It or Ticket magnets; issued 3 media releases and the media covered 1 event.
2. Click “Save”.
3. Click “Next”.



Coalition Meeting Goal Progress

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

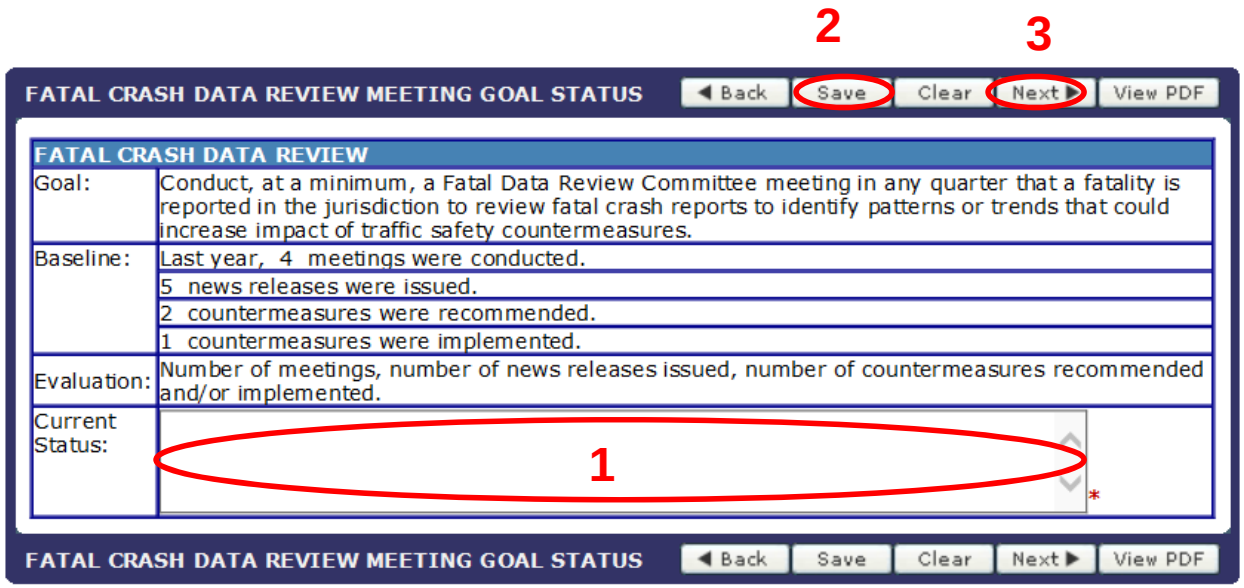
1. Using your evaluation as a guide, enter the current status of the goal. Example: Conducted 1 meeting; 0 new members joined; 10 members were active in activities/events; 1 member was representative of ethnic and/or limited English speaking communities.
2. Click “Save”.
3. After the page has processed, click “Next”.



Fatal Crash Data Review Goal Progress

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

1. Using your evaluation as a guide, enter the current status of the goal. Example: Conducted 1 meeting; 1 news release was issued; 0 countermeasures were recommended; 1 countermeasure was implemented.
2. Click “Save”.
3. After the page has processed, click “Next”.



Goal Progress

The report pulls forward your goal, baseline and evaluation for any optional goals approved in your grant.

1. Using your evaluation as a guide, enter the current status of the goal. Example: If your evaluation was “Number of teens reached, number and types of materials distributed, number of news releases issued and media coverage received” your current status would read “This month we reached 5,432 teens; distributed 500 impaired driving posters, 300 distracted driving posters, 1,000 Click It or Ticket magnets; issued 3 media releases and the media covered 1 event.
2. Click “Save”.
3. If you have additional goals, use the drop down and go buttons or the small next to proceed to the next page.
4. After completing the last goal result, click “Next”.

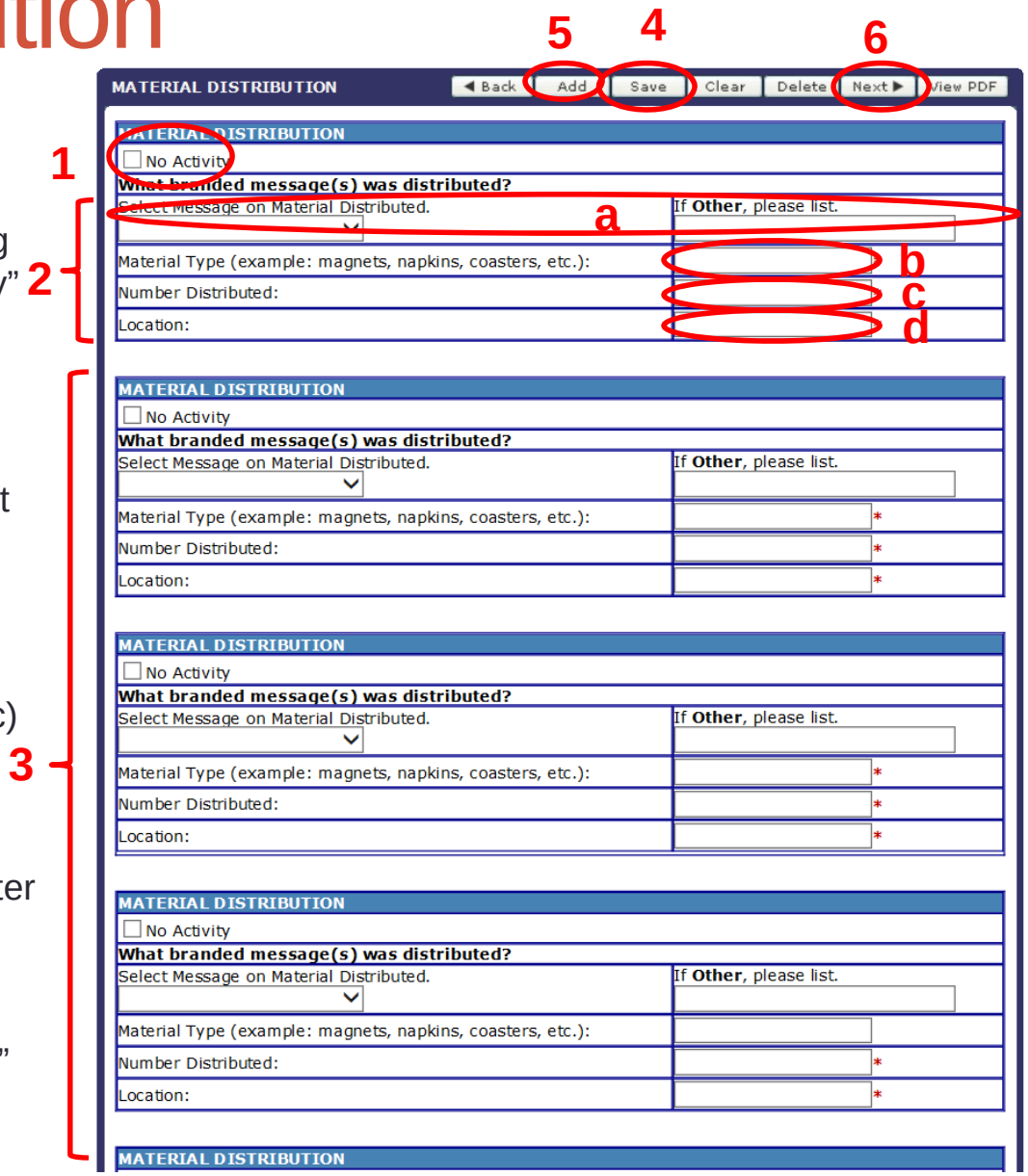
Material Distribution

Use this form to report materials distributed during the reporting period.

1. If you did not distribute any material during the reporting period, check the “No Activity” box. Proceed to Step 4.
2. For each type of material distributed complete one box:
   a) Select the message from the drop down. If you choose other, you must enter the message.
   b) Enter the material type (magnet, napkins, coasters, etc.)
   c) Enter the number distributed
   d) Enter the location (bars, schools, etc)

If you only distributed one type of material, proceed to Step 4.

3. Complete the second box following the steps listed in Step 2. Repeat until you enter all the material or you have filled all five boxes.
4. Click “Save”.
5. If you need an additional sheet, click “Add” and repeat steps 2 – 4.
6. If you are done, click “Next”.



Event Form

Use this form to report events (set up a table, booth, etc. and interact with the public to deliver OTSO approved traffic safety messaging) during the reporting period.

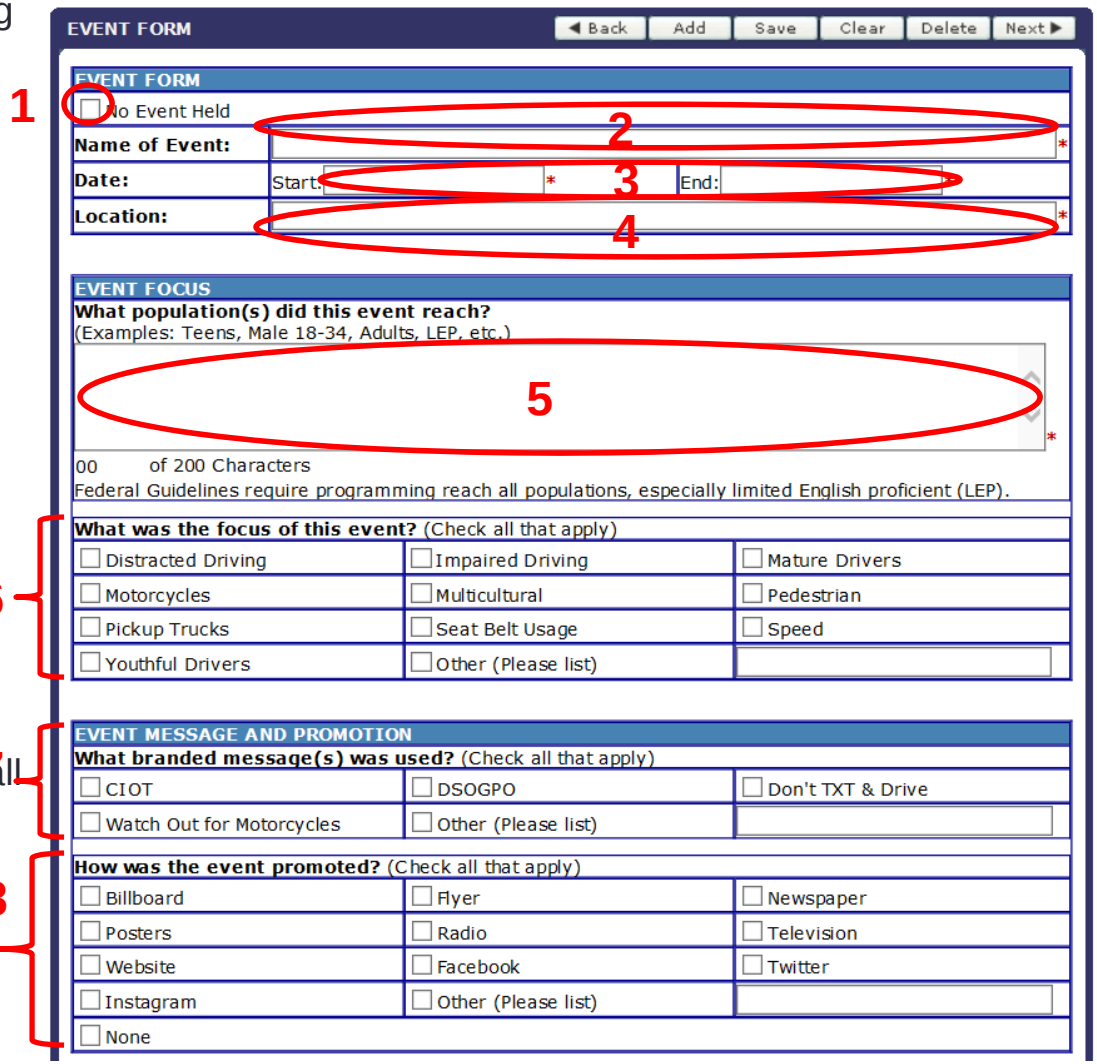
1. If you do not have any events to report during the reporting period, check the “No Activity” box. Proceed to Step 21 on Slide 53 (click “Save”).
2. Enter the name of the event.
3. Enter the start and end dates of the event (do not include planning dates)
4. Enter the location.

Event Focus:

5. Enter the population reached at the event (e.g., teens, males 18 -34, adults, etc.)
6. Check the focus (check all that apply). If you check “Other”, you must list what “Other” is.

Event Message and Promotion:

7. Check the branded message used (check all that apply). If you check “Other”, you must list what “Other” is.
8. Check how the event was promoted (check all that apply). If you check “Other”, you must list what “Other” is.

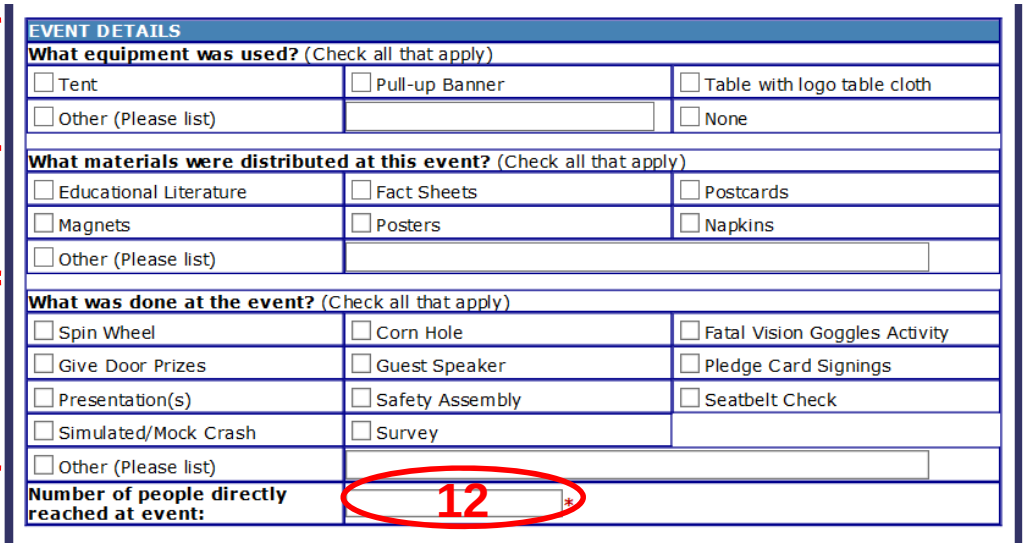


Continue to next slide

Event Form Cont.

Event Details

9. Check what equipment was used (check all that apply). If you check "Other", you must list what the "Other" is.
10. Check what materials were distributed (check all that apply). If you check "Other", you must list what the "Other" is.
11. Check what was done at the event (check all that apply). If you check "Other", you must list what the "Other" is.
12. List the number of people directly reached at the event (had direct one on one contact with, not the number that might have seen your message).



EVENT DETAILS		
What equipment was used? (Check all that apply)		
☐ Tent	☐ Pull-up Banner	☐ Table with logo table cloth
☐ Other (Please list)		☐ None
What materials were distributed at this event? (Check all that apply)		
☐ Educational Literature	☐ Fact Sheets	☐ Postcards
☐ Magnets	☐ Posters	☐ Napkins
☐ Other (Please list)		
What was done at the event? (Check all that apply)		
☐ Spin Wheel	☐ Corn Hole	☐ Fatal Vision Goggles Activity
☐ Give Door Prizes	☐ Guest Speaker	☐ Pledge Card Signings
☐ Presentation(s)	☐ Safety Assembly	☐ Seatbelt Check
☐ Simulated/Mock Crash	☐ Survey	
☐ Other (Please list)		
Number of people directly reached at event:		

Continue to next slide

Event Form Cont.

Event Funding and Contributions

13. Select Grant Funded or In Kind
14. Select (yes or no) whether or not MONEY was donated for this event. If yes, continue to Step 15. If no, skip to Step 16.
15. Enter the name of the donor and the amount.
16. Select (yes or no) whether or not material or supplies were donated for this event. If yes, continue to Step 17. If no, skip to Step 18.
17. Enter the name of the donor and the object (not dollar value) donated.
18. Enter the number of volunteer hours contributed to the event.

Event Media Coverage

19. Select (all that apply) the media coverage that the event received and enter the gross impressions (total number of people or audience potentially reached).

EVENT FUNDING AND CONTRIBUTIONS		
Grant Funded/In Kind	13	Grant Funded - any part of activity is grant funded In Kind - no part of activity is grant funded
Were there any monetary donations contributed to event that were not grant funded? (If yes, use lines below for agency and amount)	14 *	
Name of Agency:		Total Contribution:
Were any materials or supplies donated to the event? (If yes, please list below)	16	
Name of Agency:		Donation:
Number of volunteer hours contributed to event:	18	

EVENT MEDIA COVERAGE	
What media coverage did the event receive?	**Gross impressions***
☐ Print	
☐ Radio	
☐ Television	
☐ Web	
☐ Facebook	
☐ Twitter	
☐ Instagram	
☐ Other (Please list below)	
Total number of people or audience potentially reached by the type of media used.	

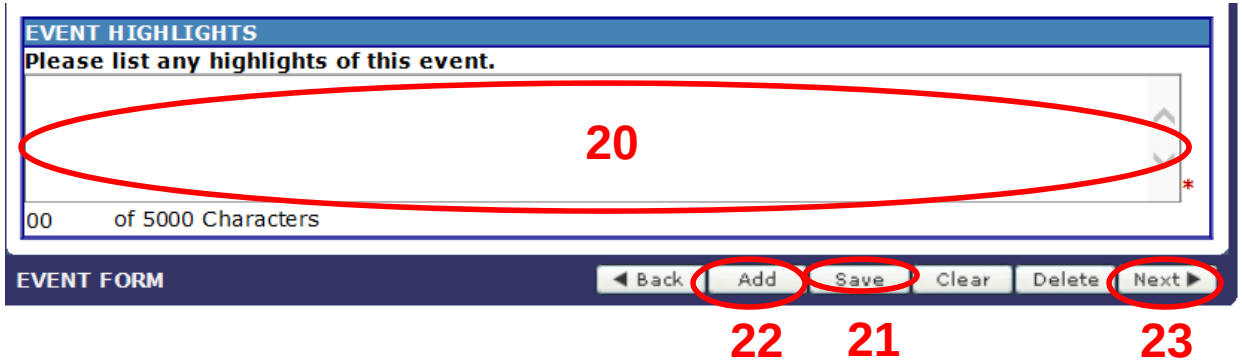
15

17

19

Continue to next slide

Event Form Cont.



Event Highlights

20. Enter any highlights from the event.
21. Click “Save”.

If you need to enter more events, continue to Step 22. If you are done entering events, skip to Step 23.

22. Click “Add”.

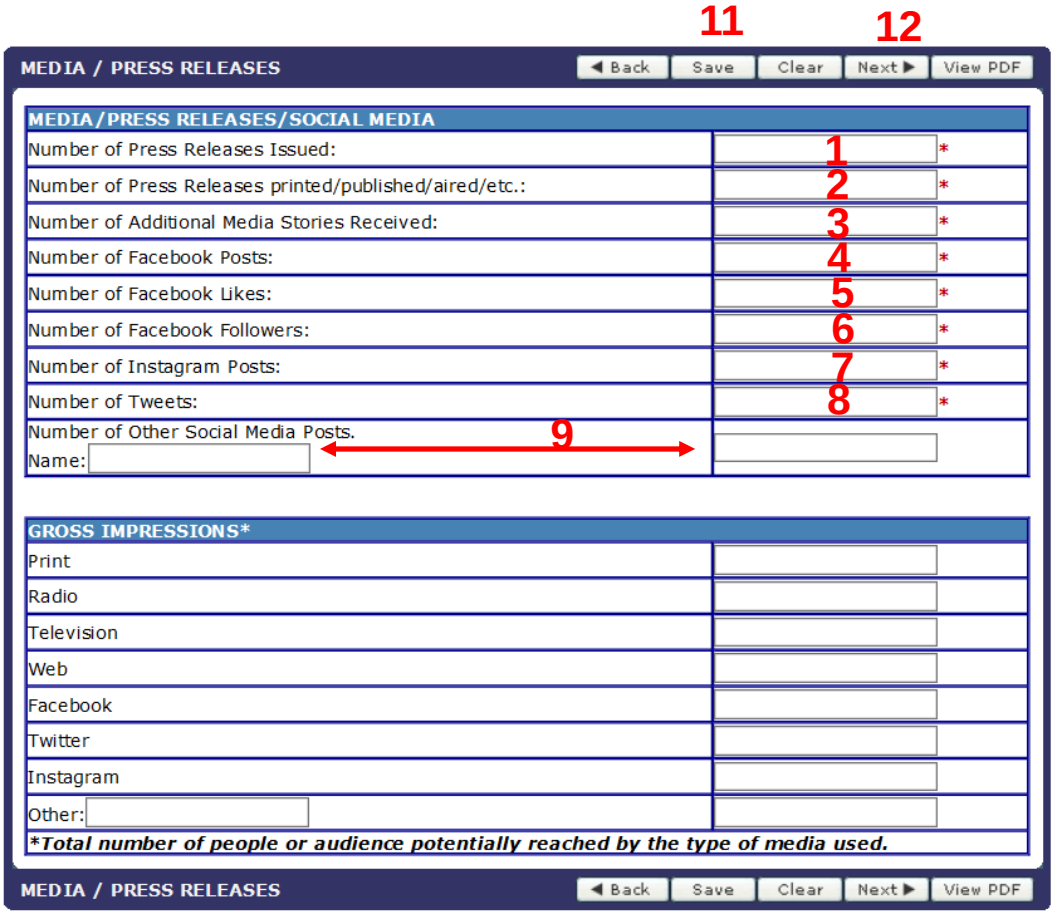
Repeat Steps 2 – 21 on Slides 50 – 53 until all events have been entered.

23. Click “Next”.

Media / Press Releases Form

Use this form to enter information from all media / press issued/received during the reporting period that is not connected with an event.

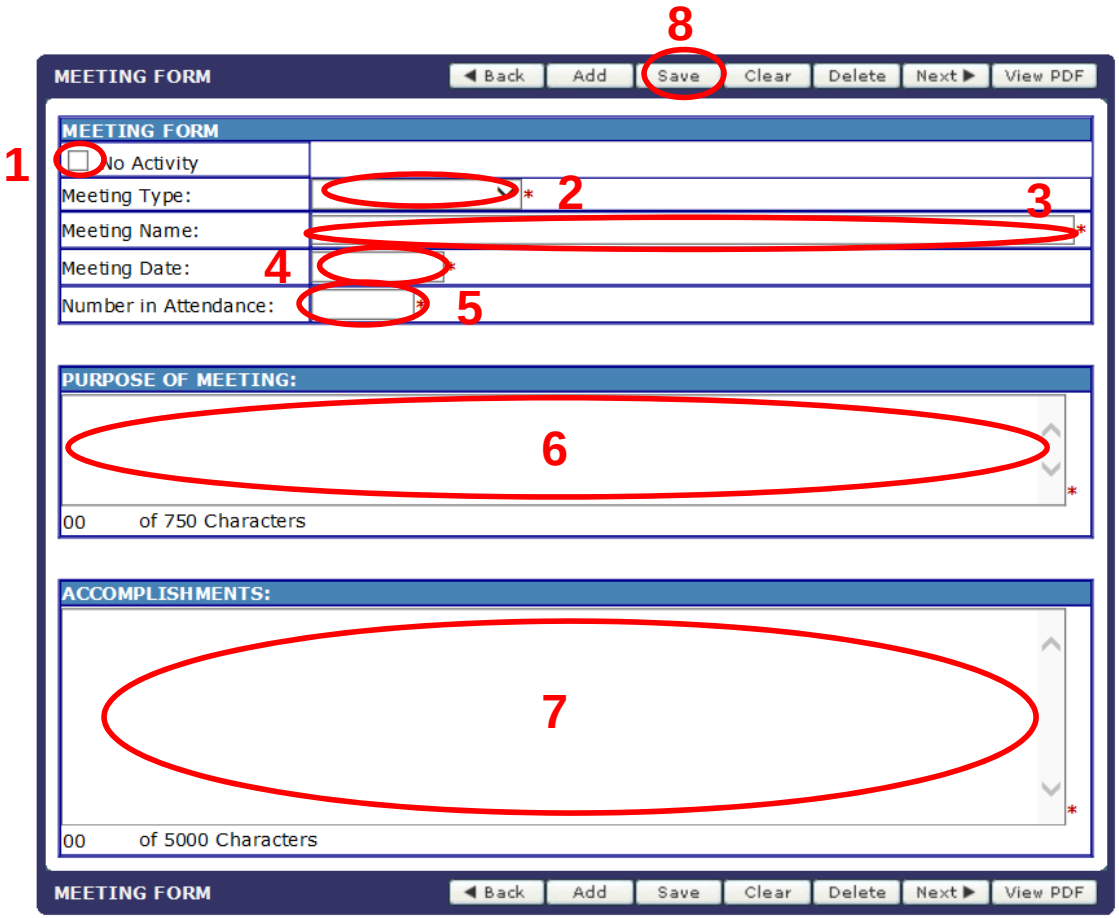
1. Enter the number of press releases issued.
2. Enter the number of press releases printed/published/aired/etc.
3. Enter the number of Additional Media Stories Received. (e.g., interviews, unsolicited articles)
4. Enter the number of Facebook Posts.
5. Enter the number of Facebook Likes.
6. Enter the number of Facebook Followers.
7. Enter the number of Instagram Posts. 10
8. Enter the number of Tweets.
9. Enter the name and number of other Social Media Posts.
10. Select (all that apply) the media coverage received and enter the gross impressions (total number of people or audience potentially reached).
11. Click “Save”.
12. After the page has saved, click “Next”.



Meeting Form

Use this form to report any meetings conducted during the month.

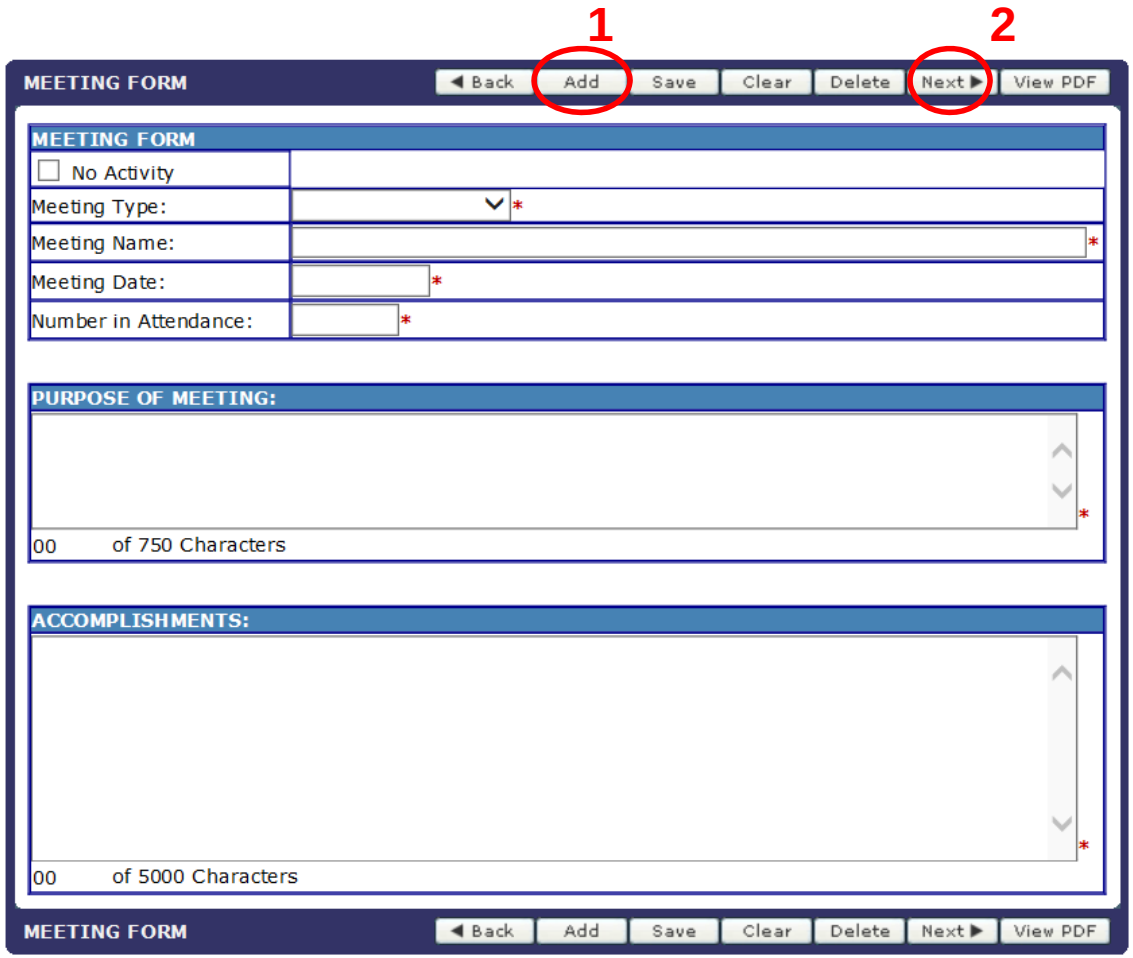
1. If no meetings were conducted, check the “No Activity” box.
2. Select Meeting Type from drop down.
3. Enter the meeting name.
4. Enter the date of the meeting.
5. Enter the number of people who attended the meeting.
6. Enter the purpose of the meeting.
7. Enter the accomplishments of the meeting.
8. Click “Save”.



Meeting Form

After hitting save, allow the page to process.

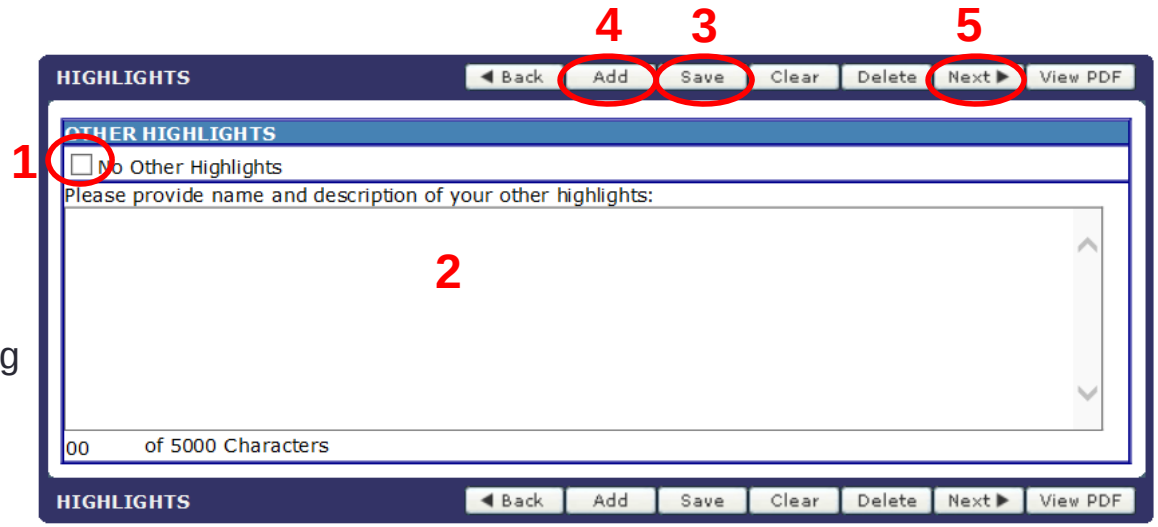
1. If you need to enter another form, hit “Add” and repeat steps 1 - 8 on the previous slide.
2. Once you are done entering meetings, click “Next”.



Highlights

Use this page to report any other highlights for the reporting period.

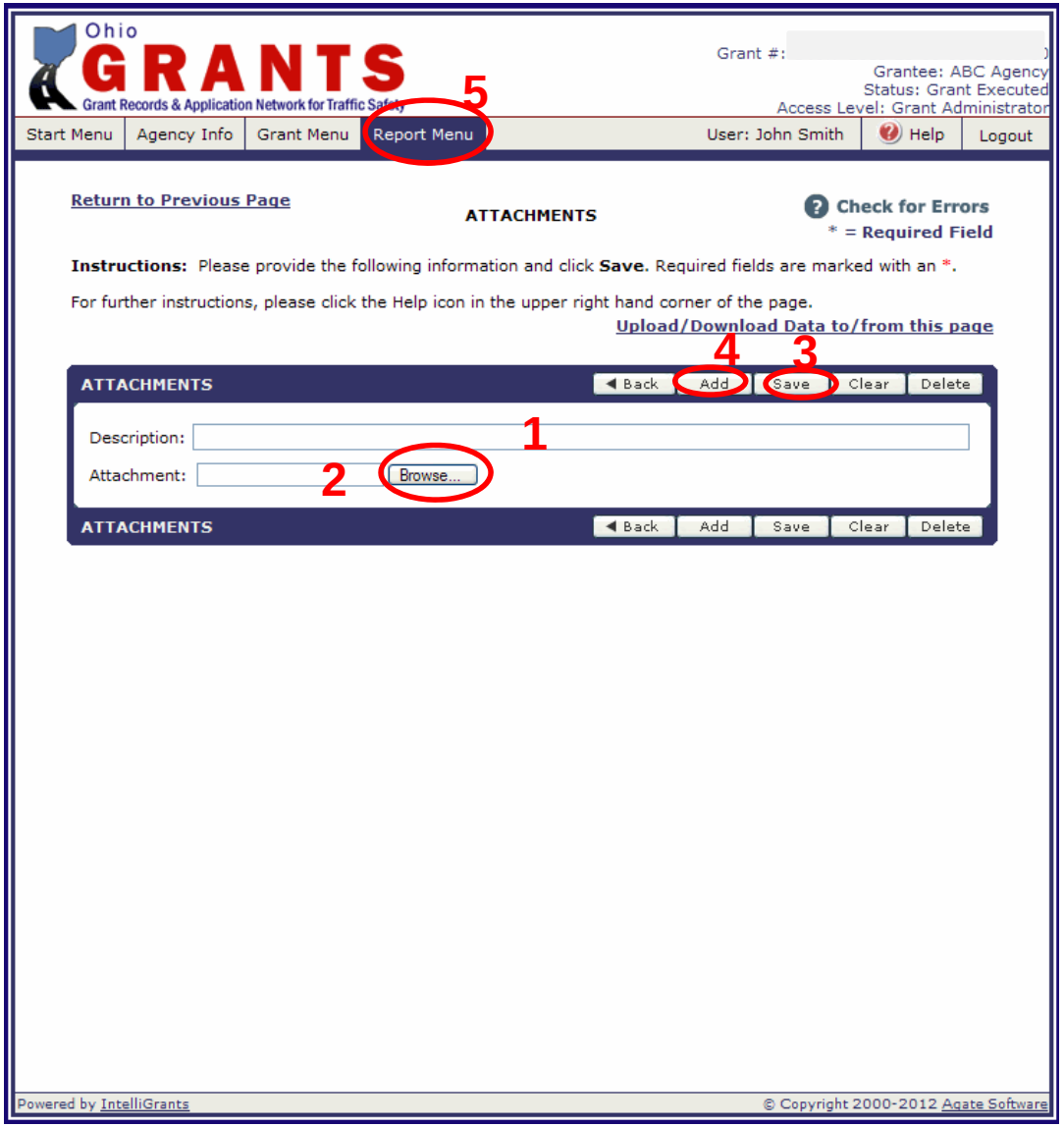
1. If you do not have any highlights to report during the reporting period, check the “No Other Highlights” box. Skip to Step 3.
2. List any highlights you had during the reporting period. Do not include highlights from events, enter those on the Event Form under Highlights. Do not enter daily activities (information from your Personnel Activity Report).
3. Click “Save”.
4. After saving, if you have more highlights, click “Add” and repeat steps 2 and 3 above.
5. When done adding all highlights for the reporting period, click “Next”.



Progress Report Attachments

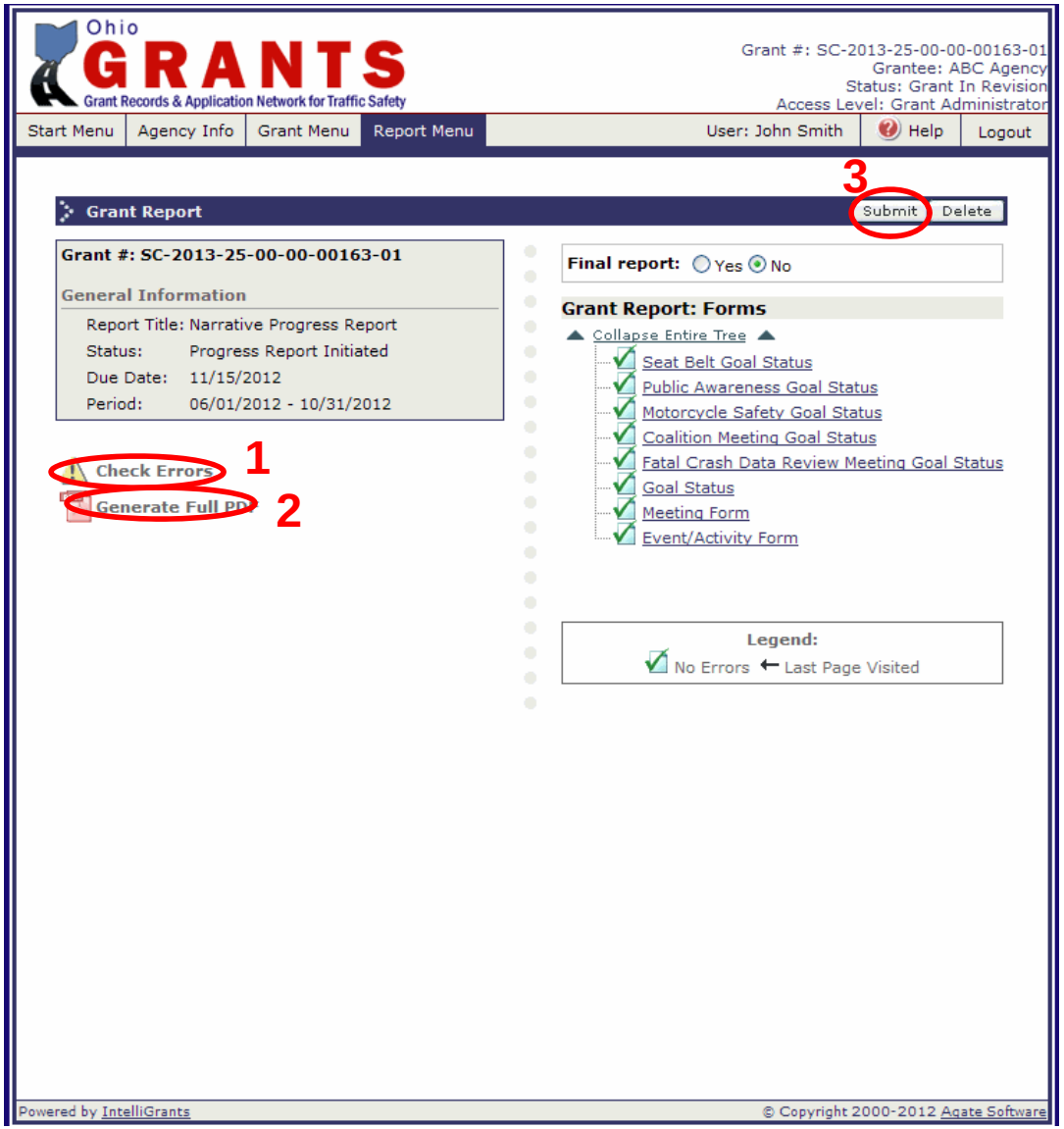
Use this form to attach documents to your monthly narrative progress report (press releases, news articles, etc.). Do not attach claim related documentation to your report.

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”.



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

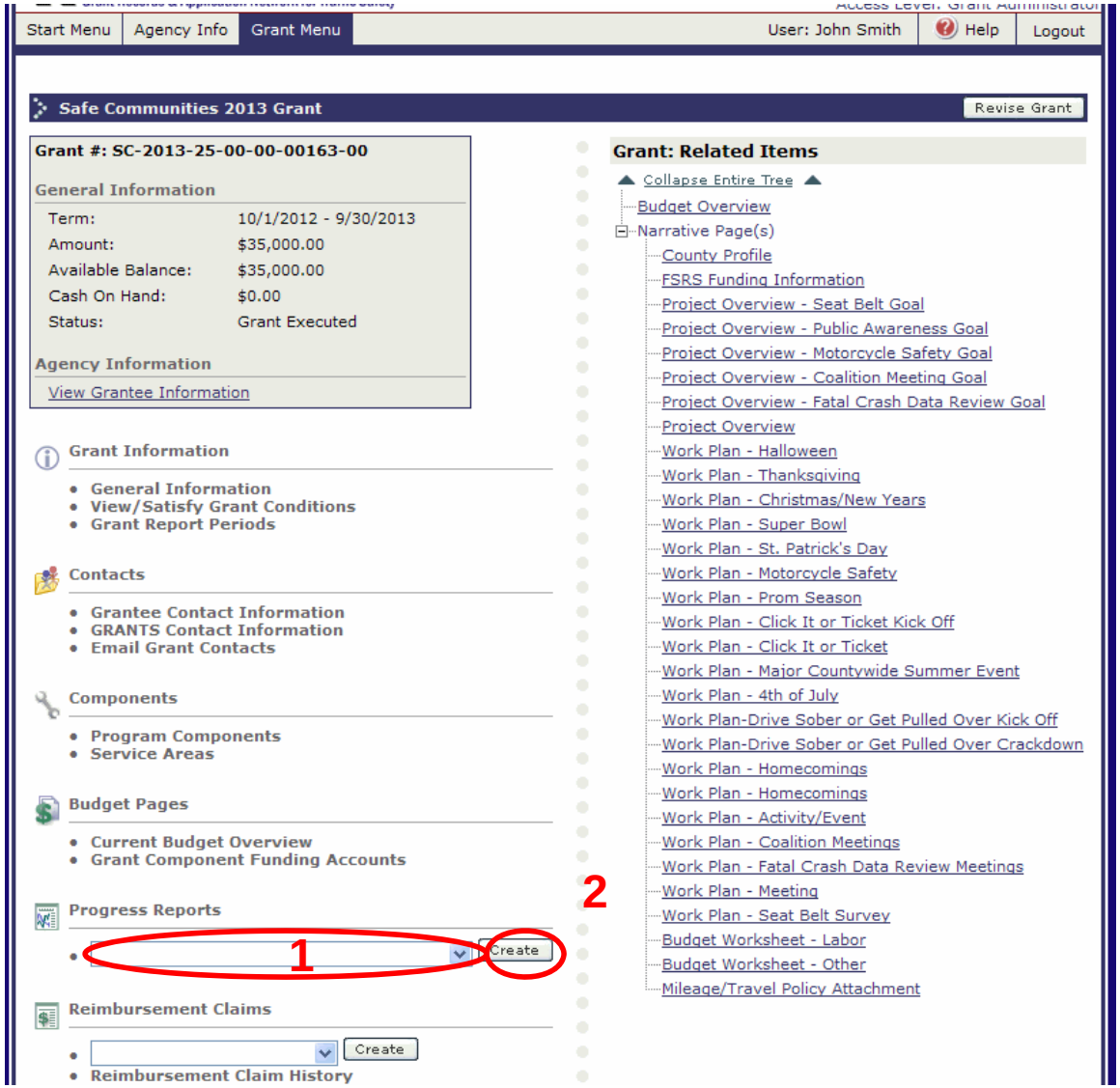
- A final comprehensive annual project activity report must be submitted to OTSO by October 15, 2016.
  - Final reports not received by November 1 will result in a 10 percent penalty deduction to the final claim reimbursement.
  - If a final project activity report is received after November 15, the 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:

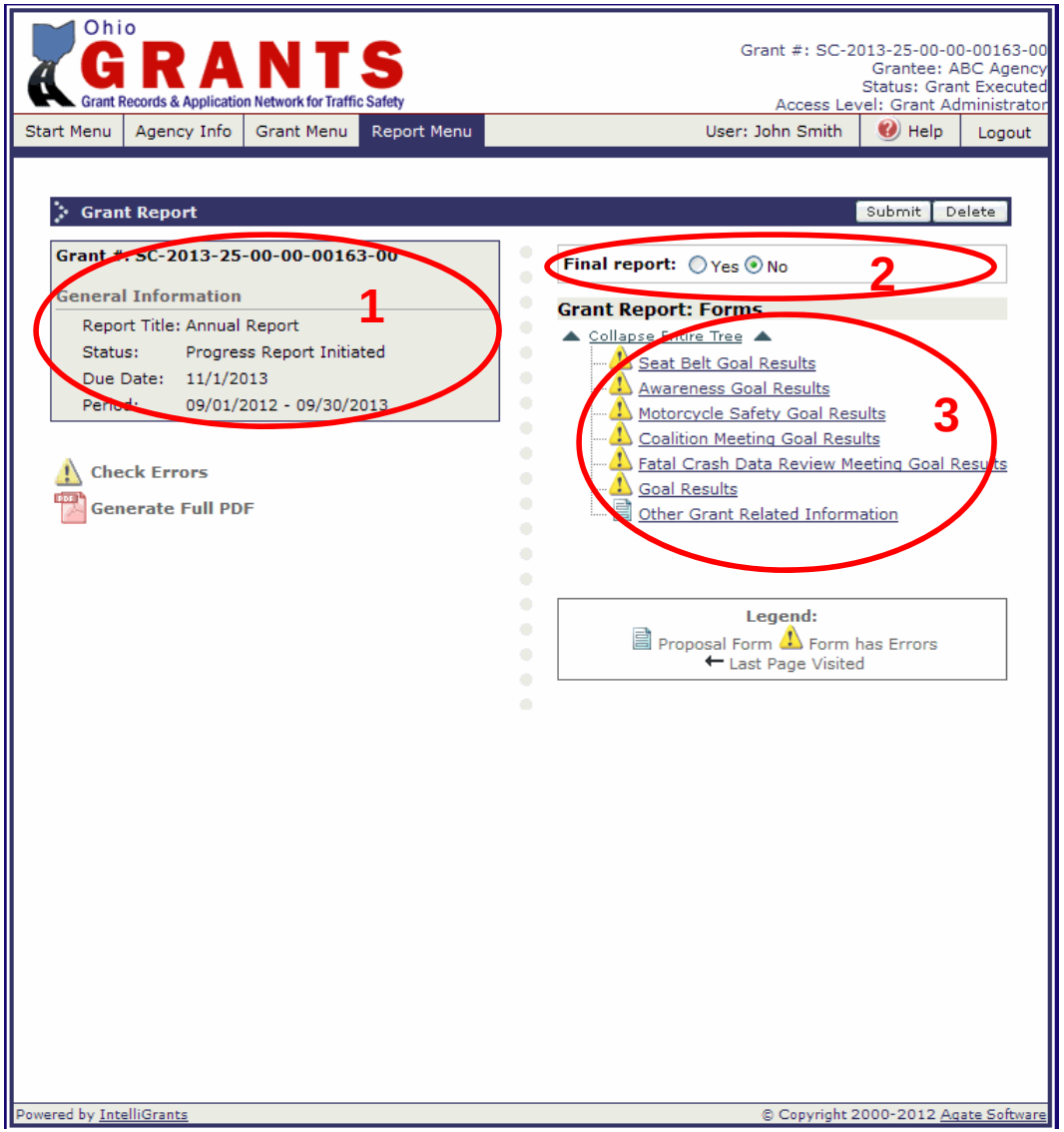
1. Select the report from the drop down menu.

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”.
3. Grant Report Forms: List of all forms in the Annual Report.



Annual Report Menu

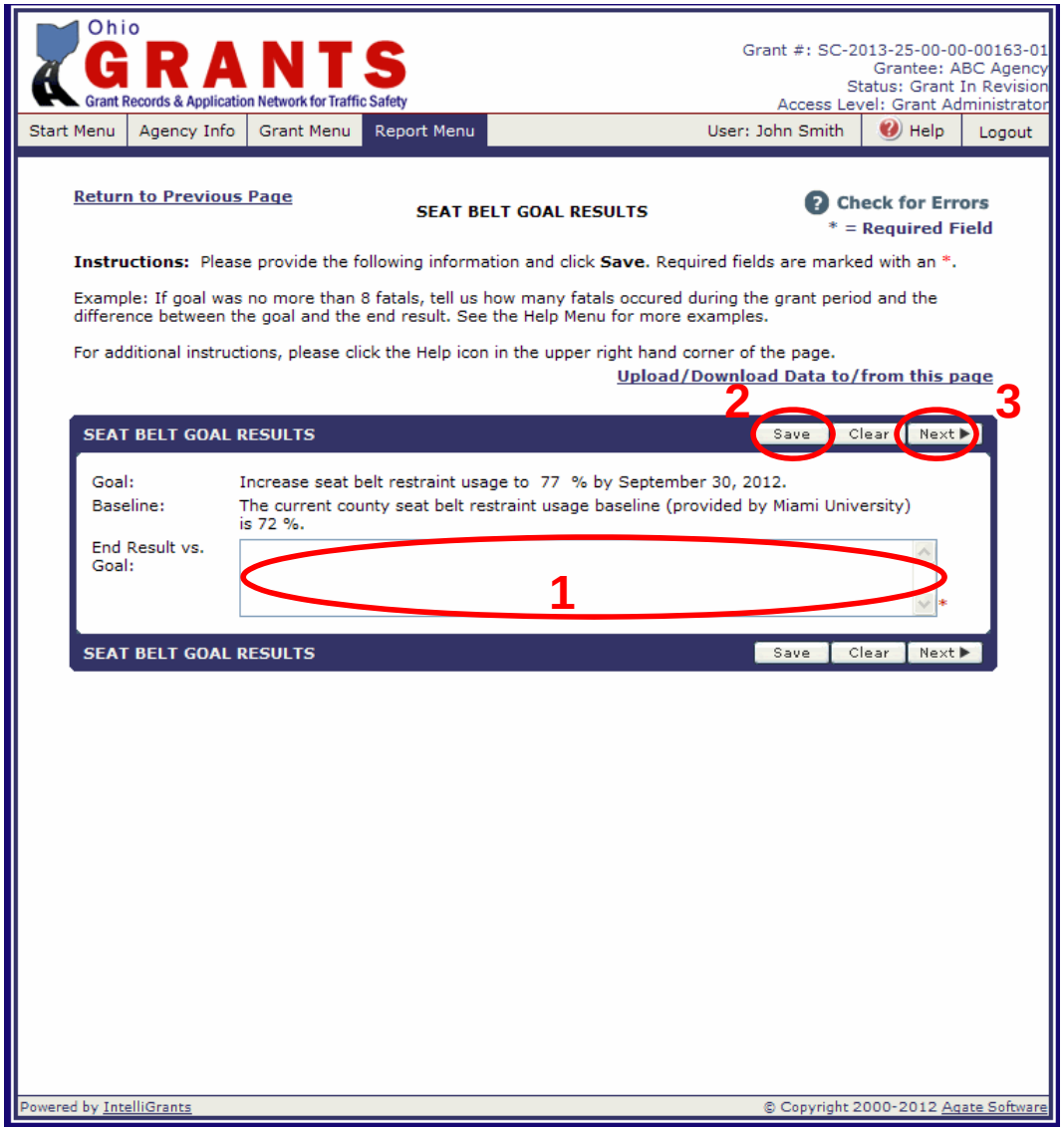
Click on the first “Seat Belt Goal Results” to begin filling out the forms.

If you submitted optional goals in your grant, you will have a Goal Results page for each optional goal.

Seat Belt Goal Results

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

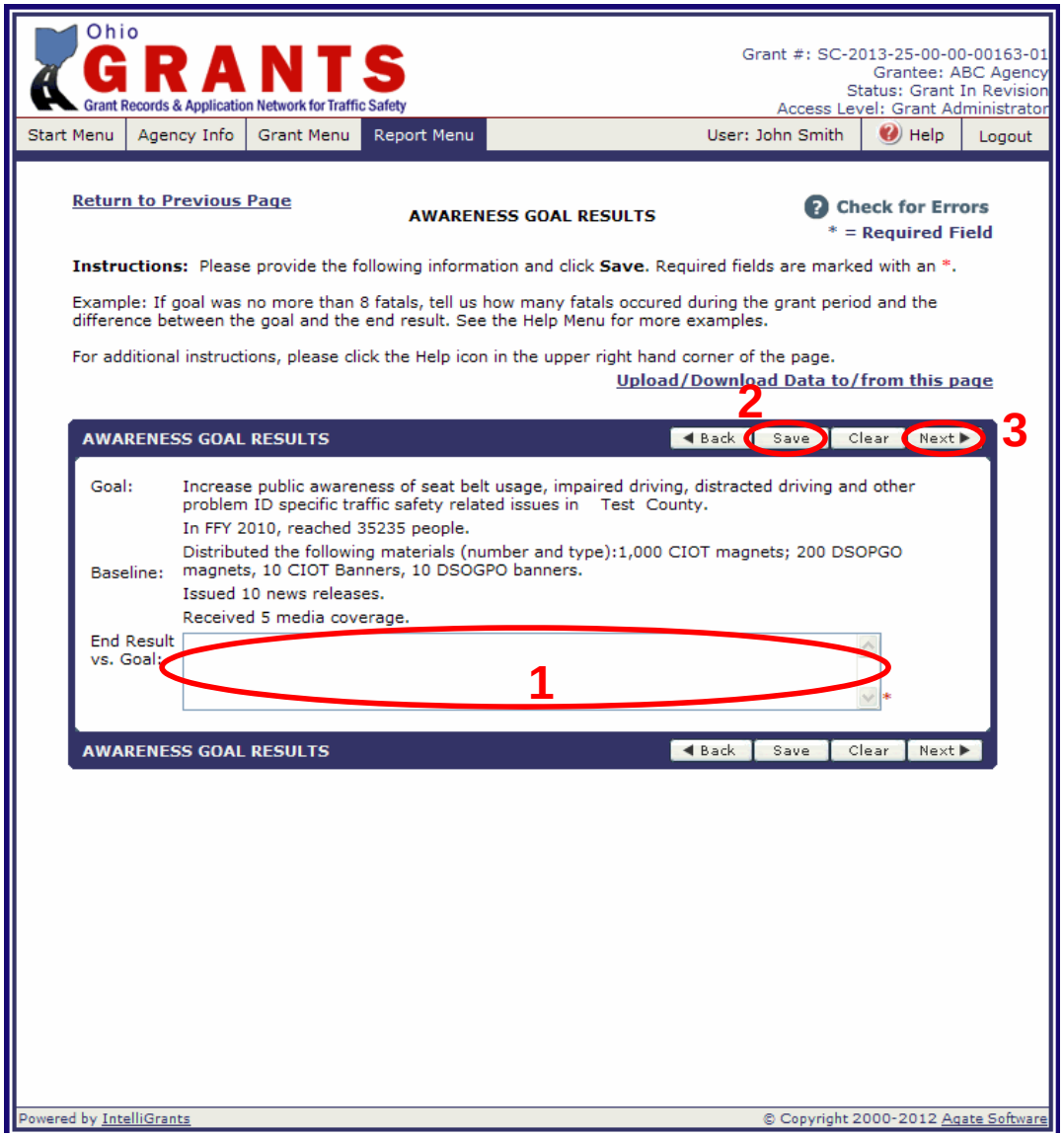
1. Using the goal, enter the end result compared to the goal and why or why not. Ex: The current seat belt usage rate provided by Miami University is 78%. We were able to exceed our goal by increasing seat belt enforcement or the current seat belt usage rate provided by Miami University is 75%. We did not meet our goal because XXXX.
2. Click “Save”.
3. After the page has processed, click “Next”.



Awareness Goal Results

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

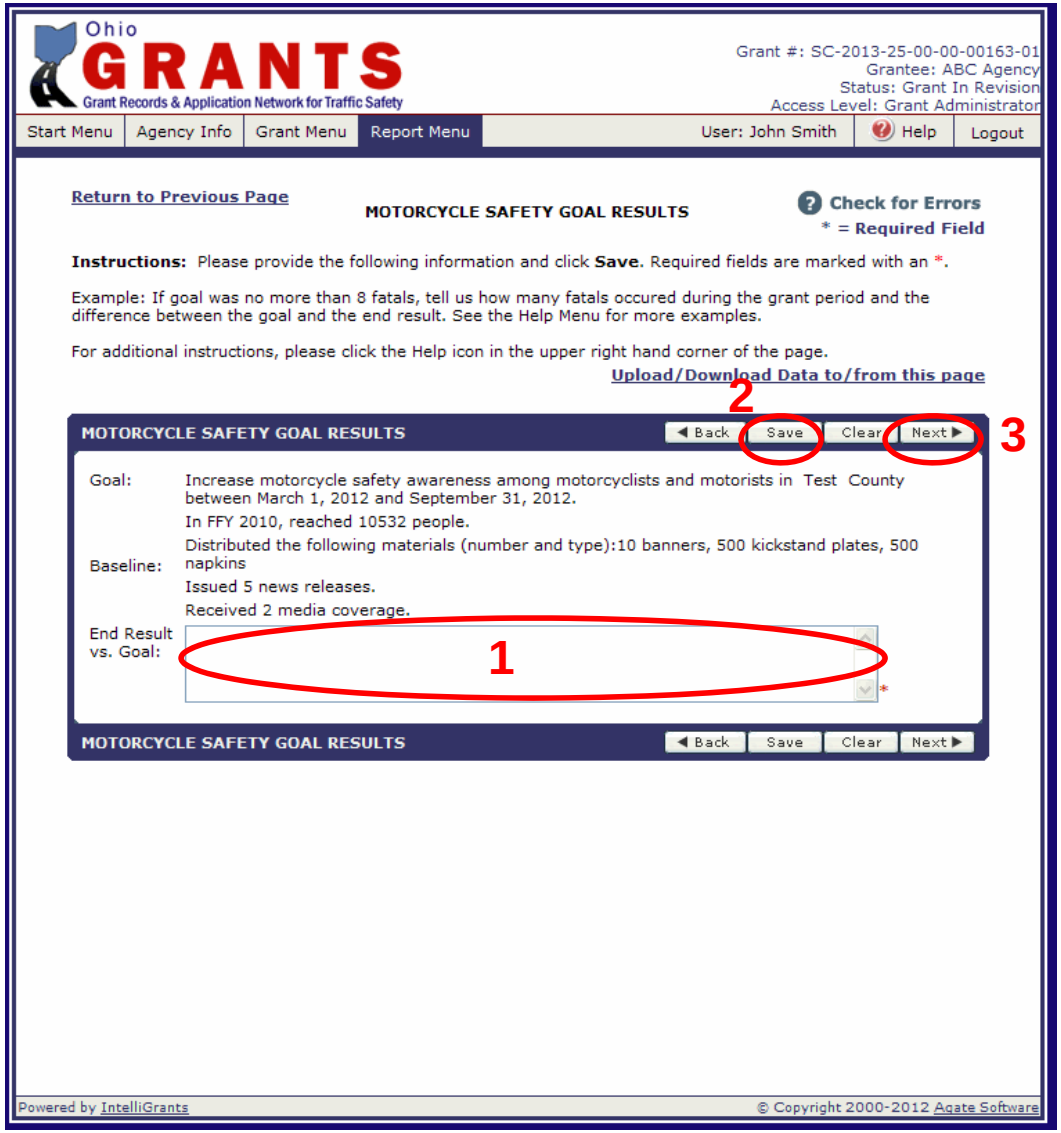
1. Using the goal, enter the end result compared to the goal and why or why not. Ex: Distributed 1,500 CIOT magnets; 500 DSOGPO magnets; 10 CIOT banners; 10 DSOGPO banners; 200 Don't Txt and Drive magnets; issued 15 news releases; received 8 media coverage.
2. Click "Save".
3. After the page has processed, click "Next".



Motorcycle Safety 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: Distributed 15 banners; 500 kickstand plates, 500 napkins, issued 8 news releases; received 8 media coverage.
2. Click “Save”.
3. After the page has processed, click “Next”.



Coalition Meeting Goal Results

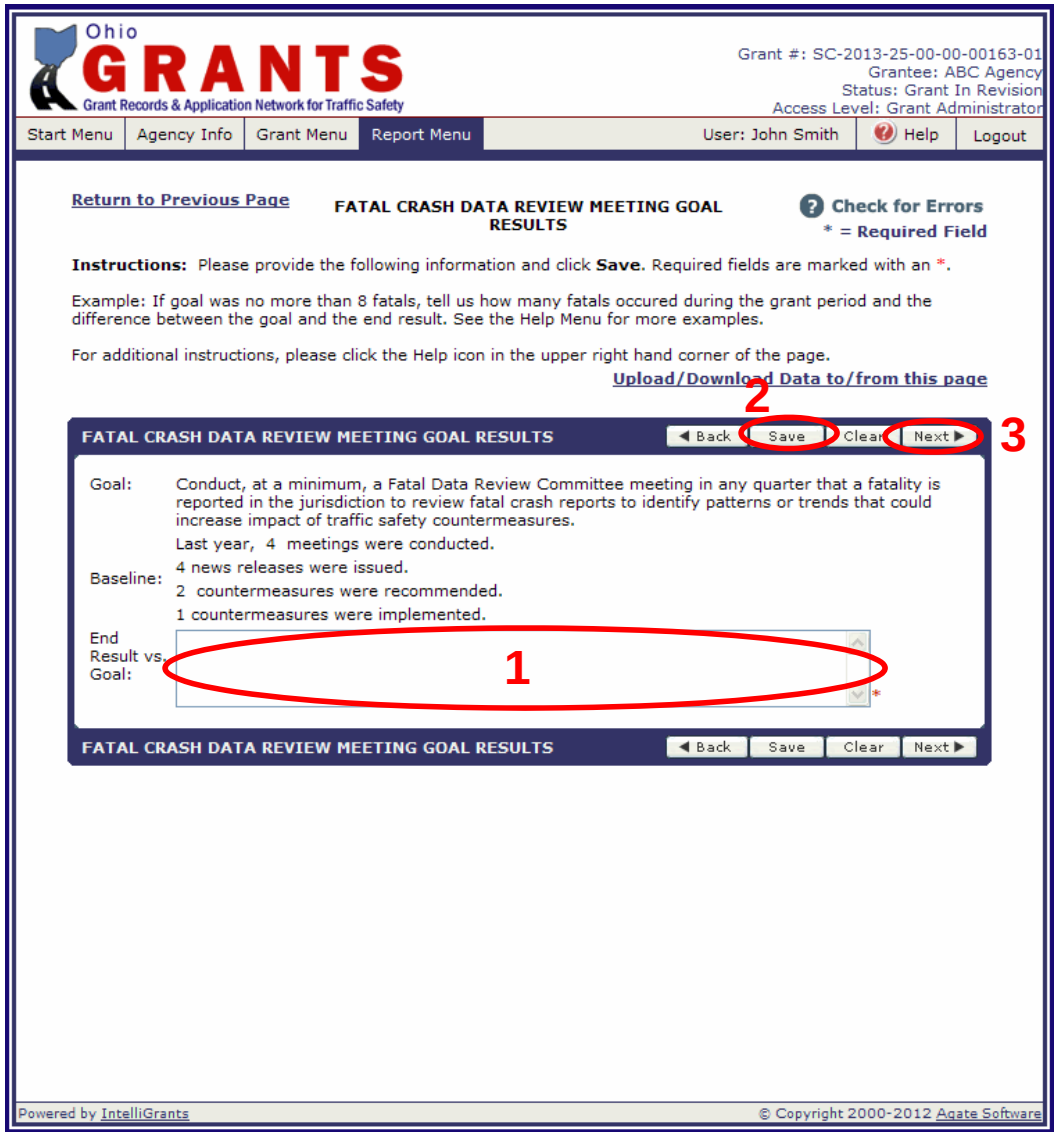
The report pulls forward your goal and baseline from your grant.

1. Using the goal, enter the end result compared to the goal and why or why not. Ex: Conducted 4 meetings; 2 new members joined; 14 members were active in activities/events; 2 members were representative of ethnic and/or limited English speaking communities.
2. Click “Save”.
3. After the page has processed, click “Next”.

Fatal Crash Data Review 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: Conducted 4 meetings; 6 news releases were issued; 3 countermeasures were recommended; 2 countermeasures were implemented.
2. Click “Save”.
3. After the page has processed, click “Next”.



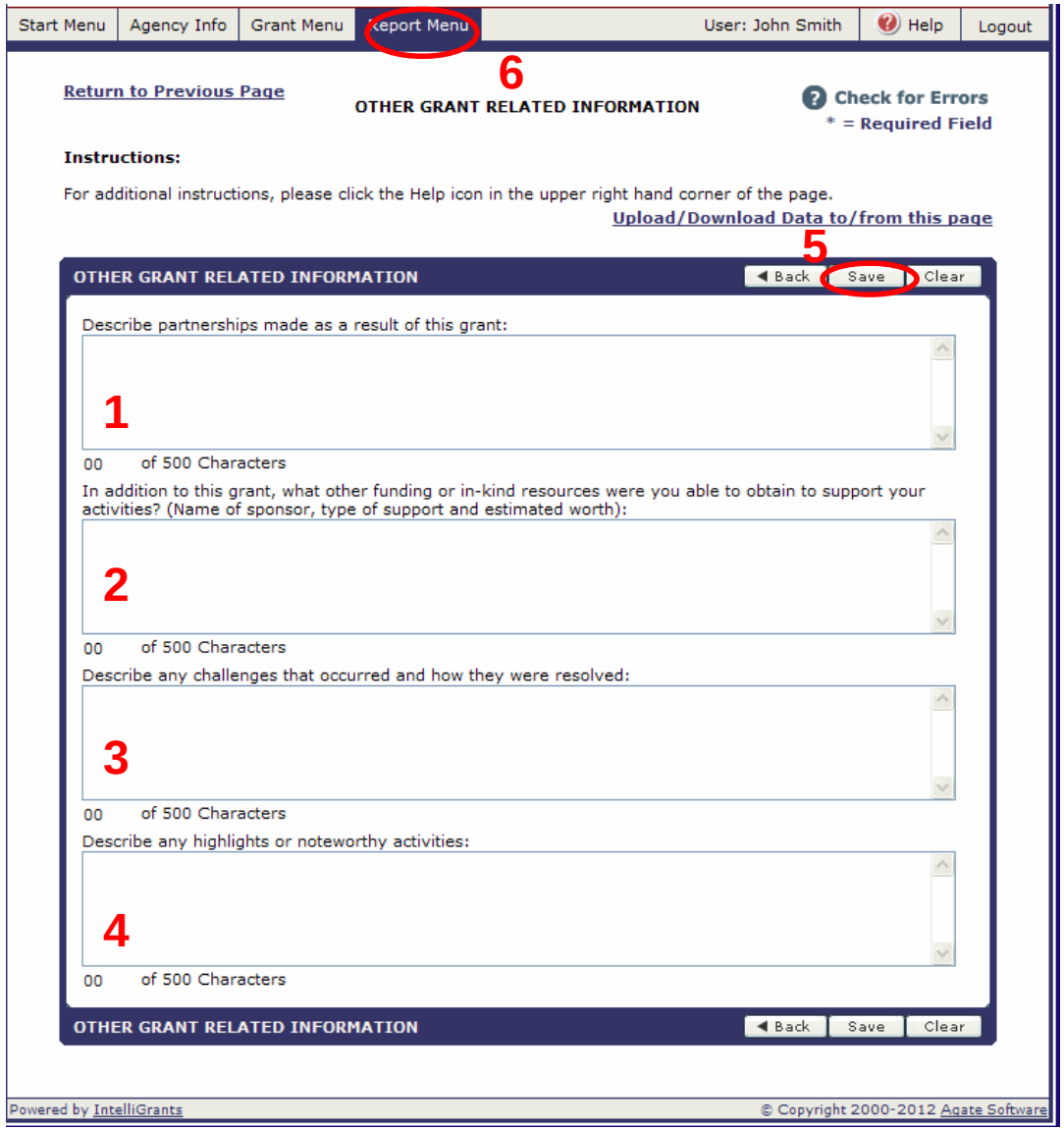
Optional Goal Results

The report pulls forward your goal and baseline from any optional goals approved in your grant.

1. Using the goal, enter the end result compared to the goal and why or why not. Ex: This year we conducted 5 training courses. We exceeded our goal of 4 because of the demand for the training or we conducted 3 training courses; we did not meet our goal of 4. We did not meet our goal because of lack of participation. We will re-evaluate the needs of the community.
2. Click “Save”.
3. If you have additional goals, use the drop down and go buttons or the small next to proceed to the next page.
4. After completing the last goal result, click “Next”.

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”.



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.

Report Submitted Process

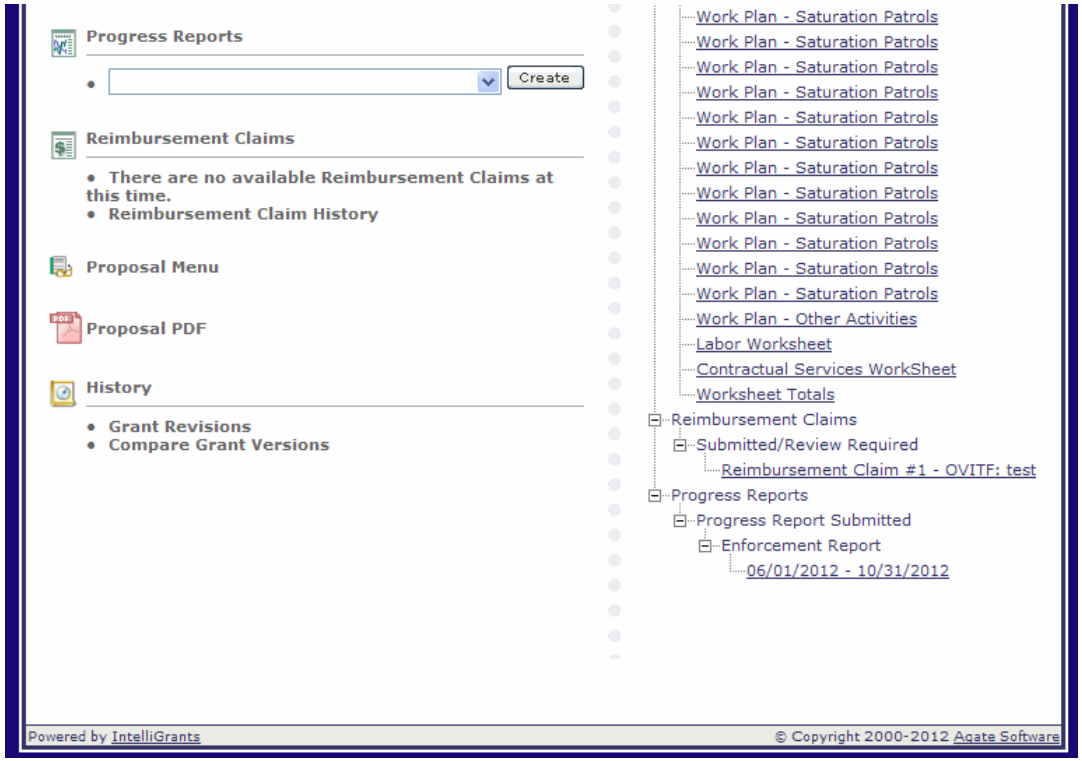
Once the report has been submitted to our office, it goes through a review process.

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 Modifications Required".**

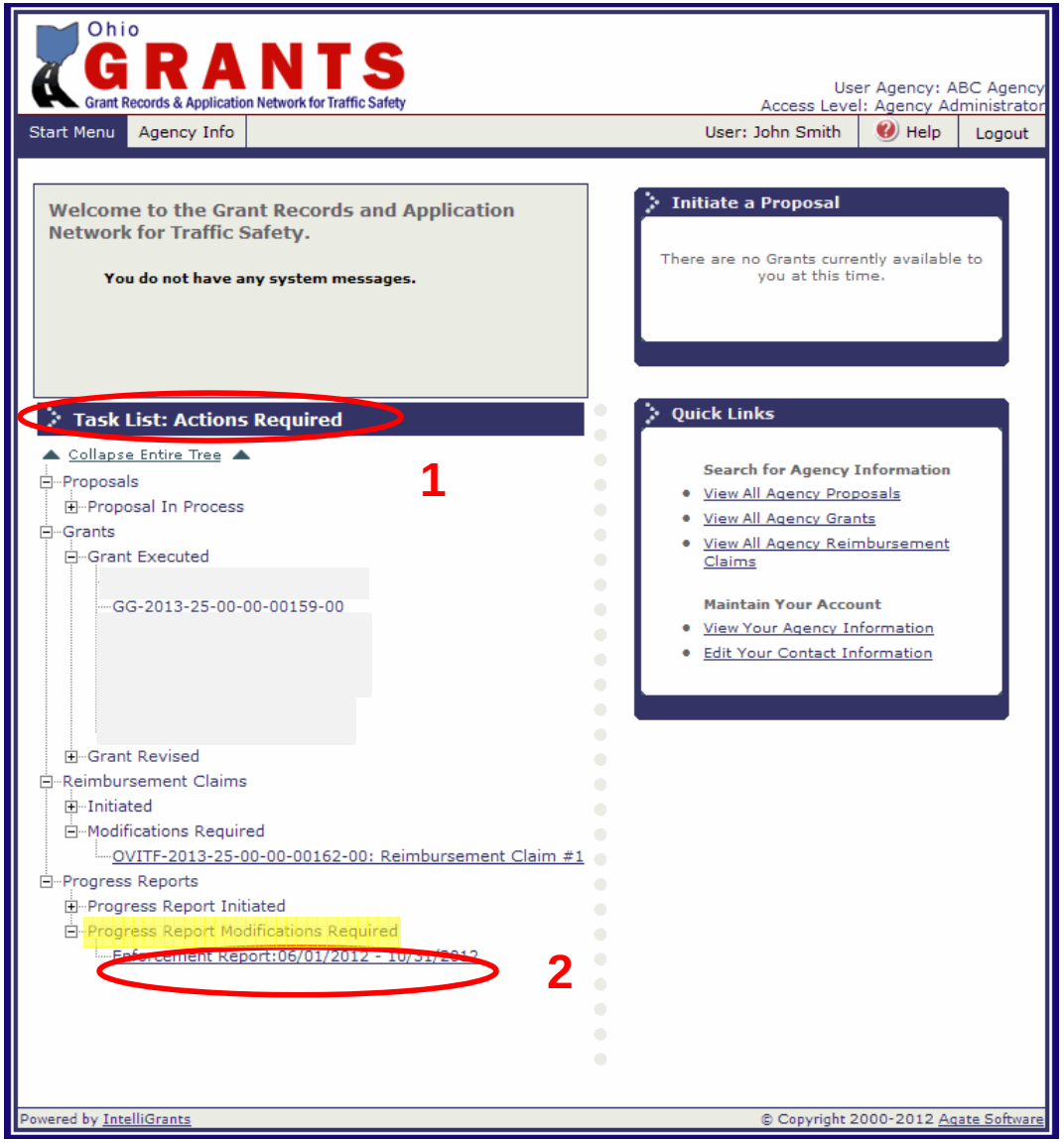
Log into the GRANTS System to make the modifications.



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

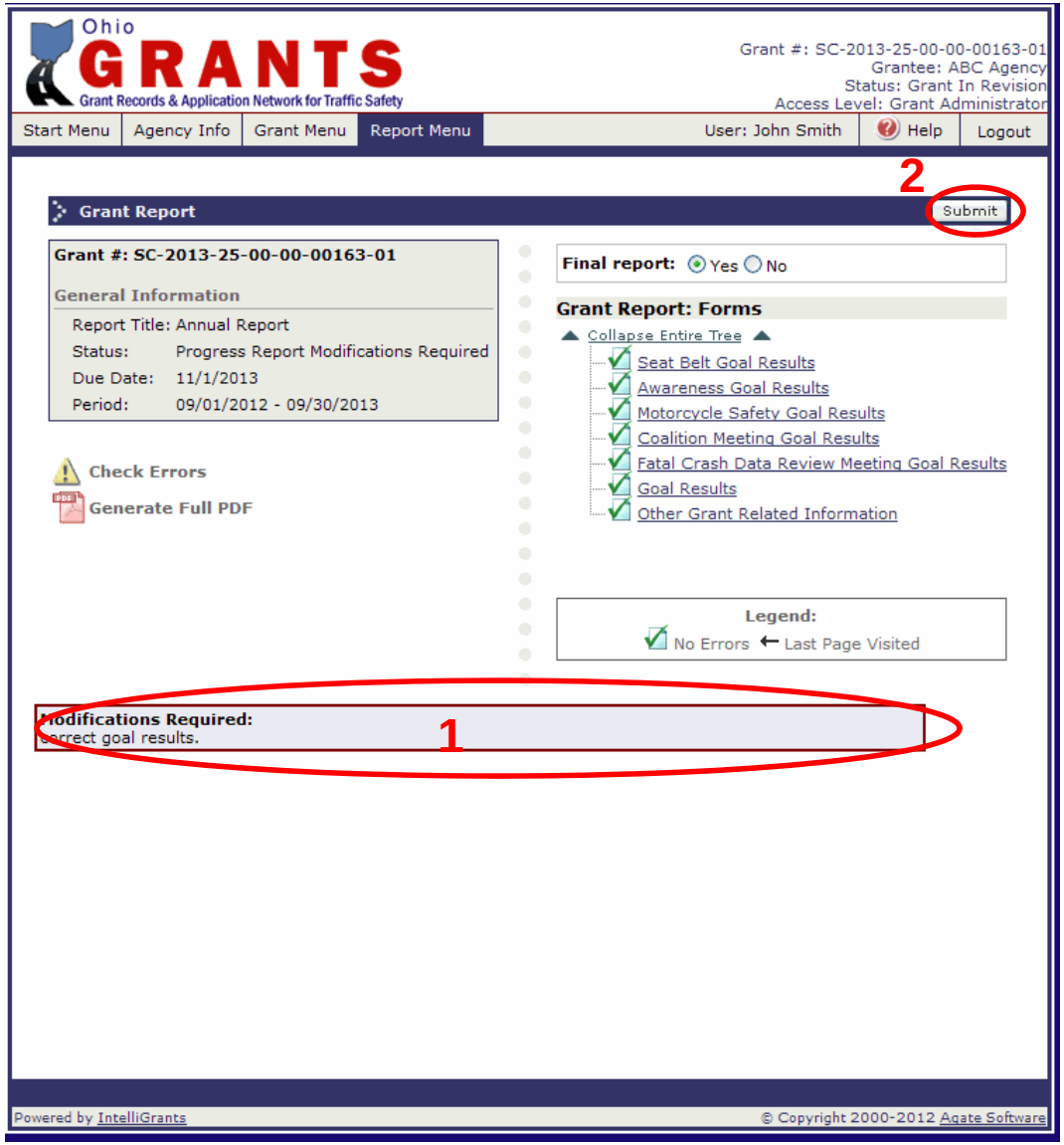
1. On the Start Menu, under the Task List, any items that need modifications will be listed.
2. Click on the link for the report you want to modify.



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.
- 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.

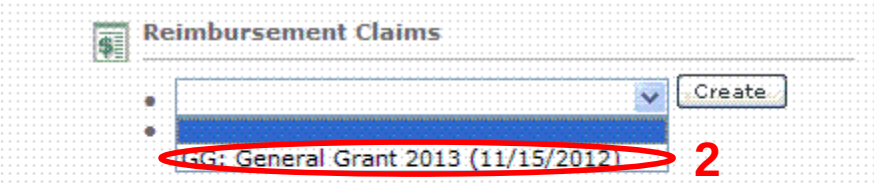
Reimbursement Claim Process

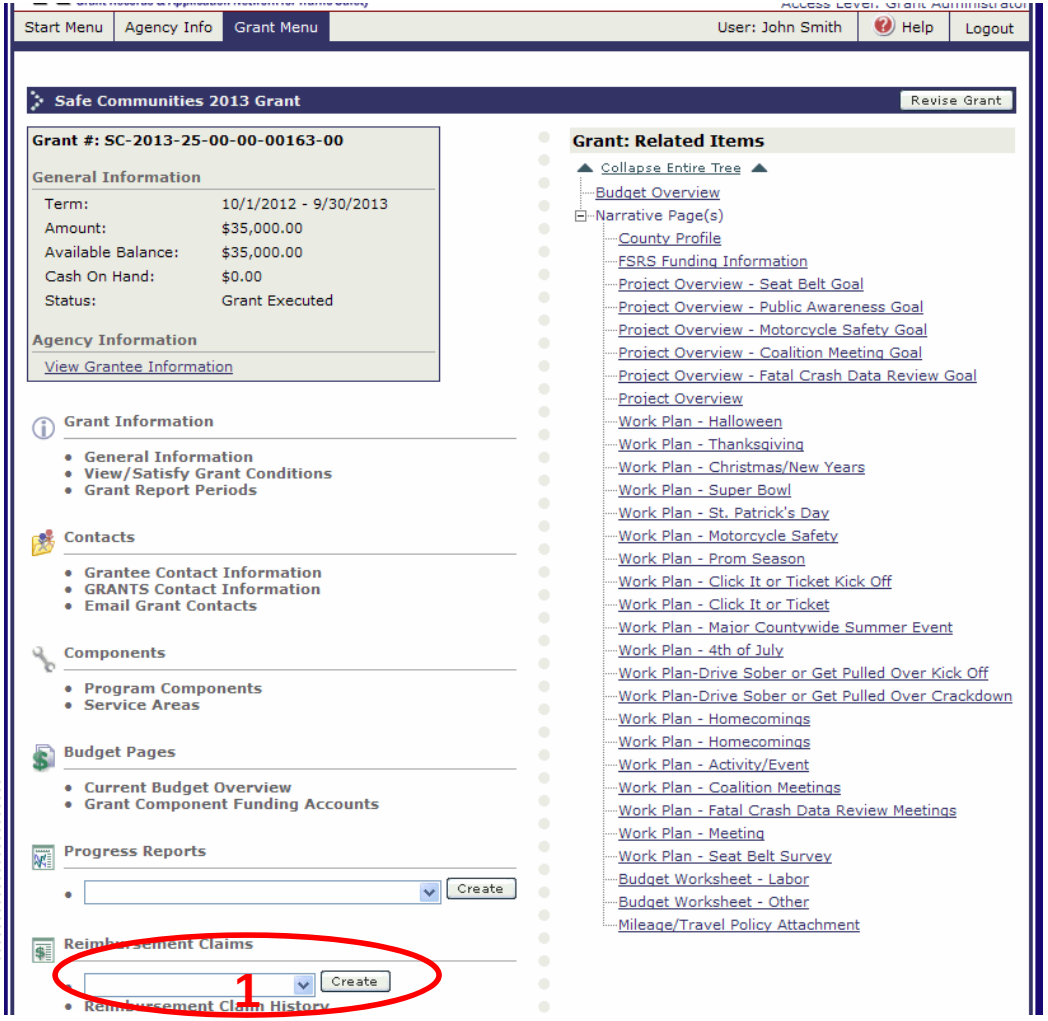
1. Reimbursement Claims will be listed in the drop down under Reimbursement Claims.

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.



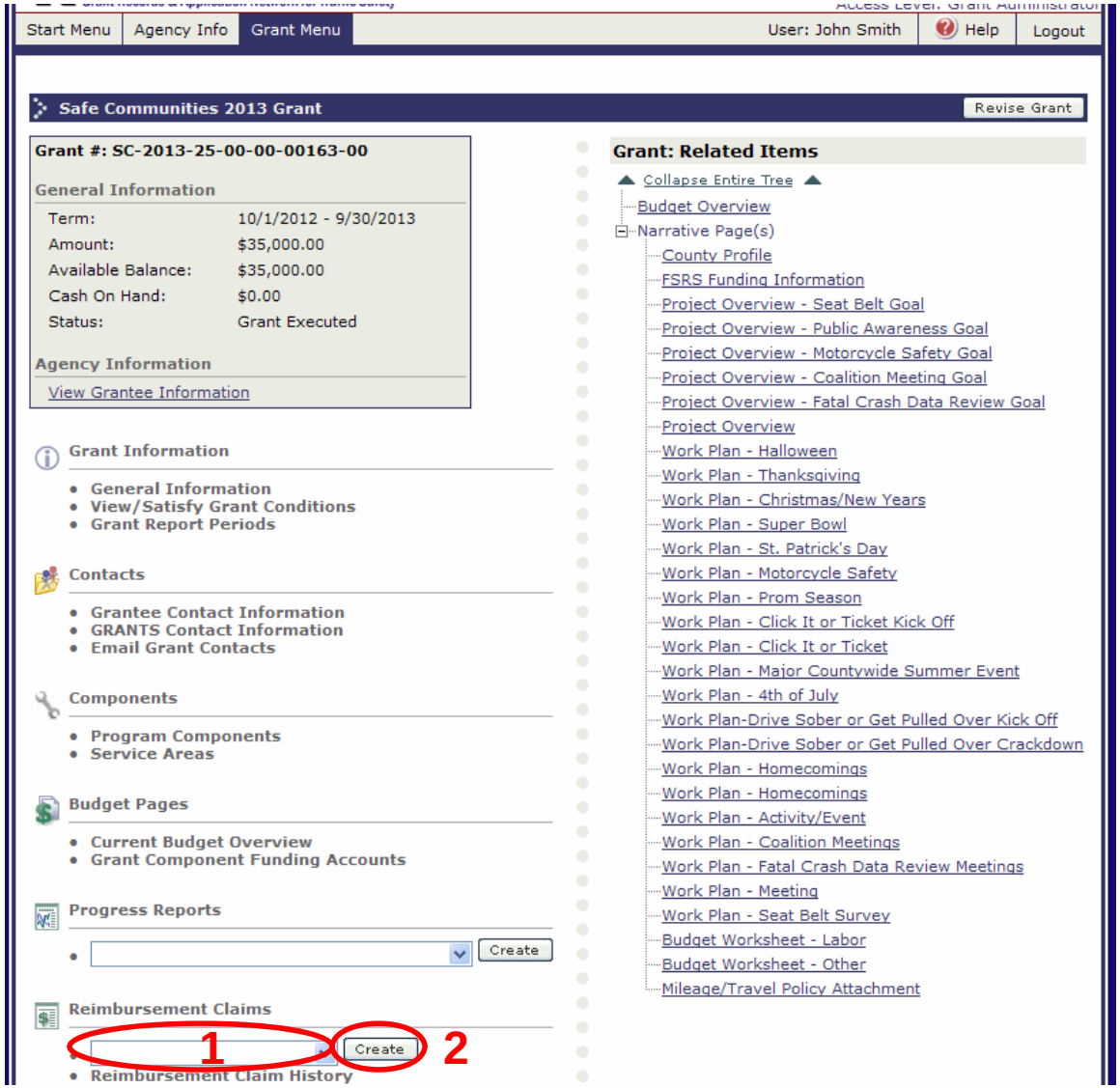


Reimbursement Claim Process

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

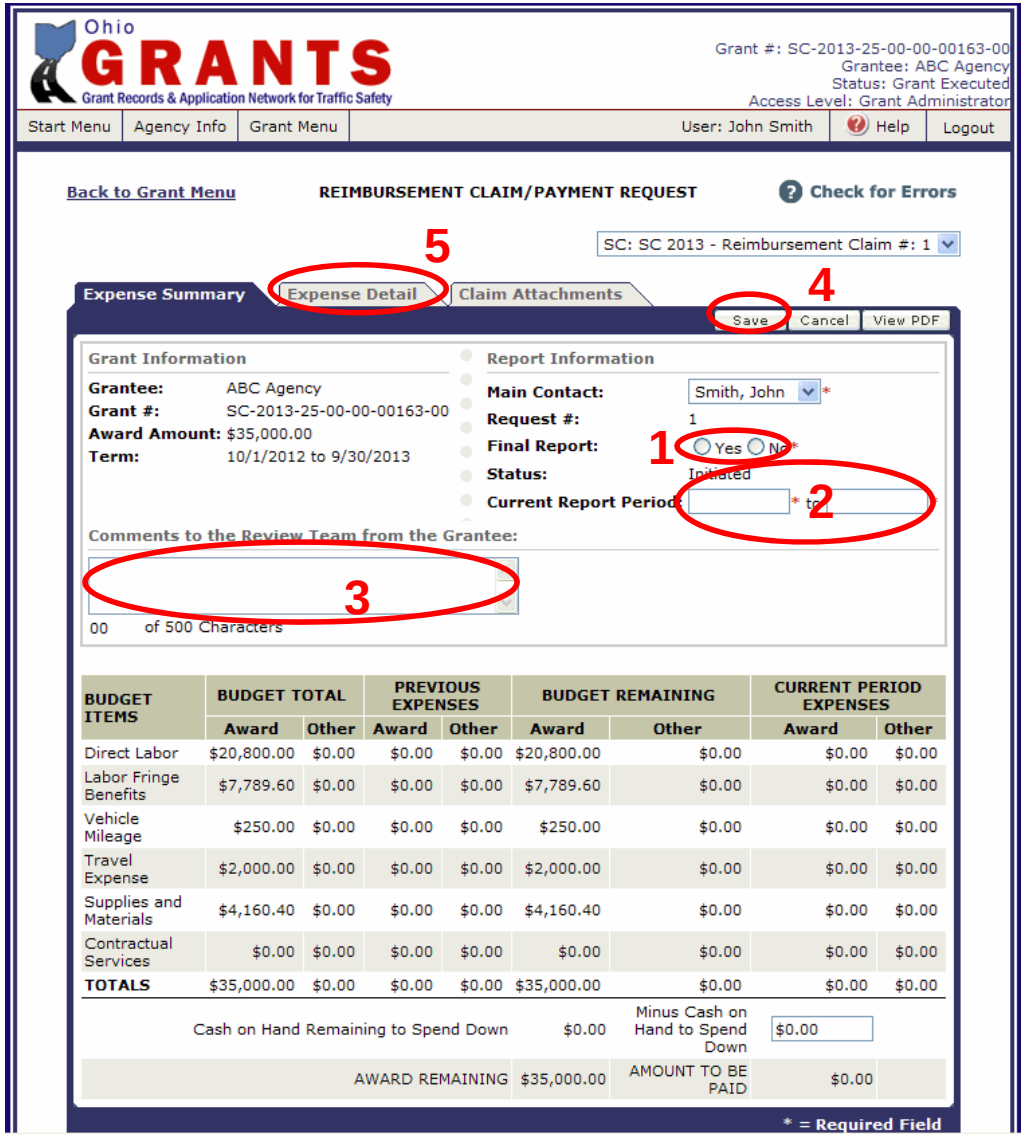
1. Unless it is the final claim for the year, select “No” for Final Report. If you select “Yes” the system will not issue any more Reimbursement Claims.

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 11/30/2015).

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.

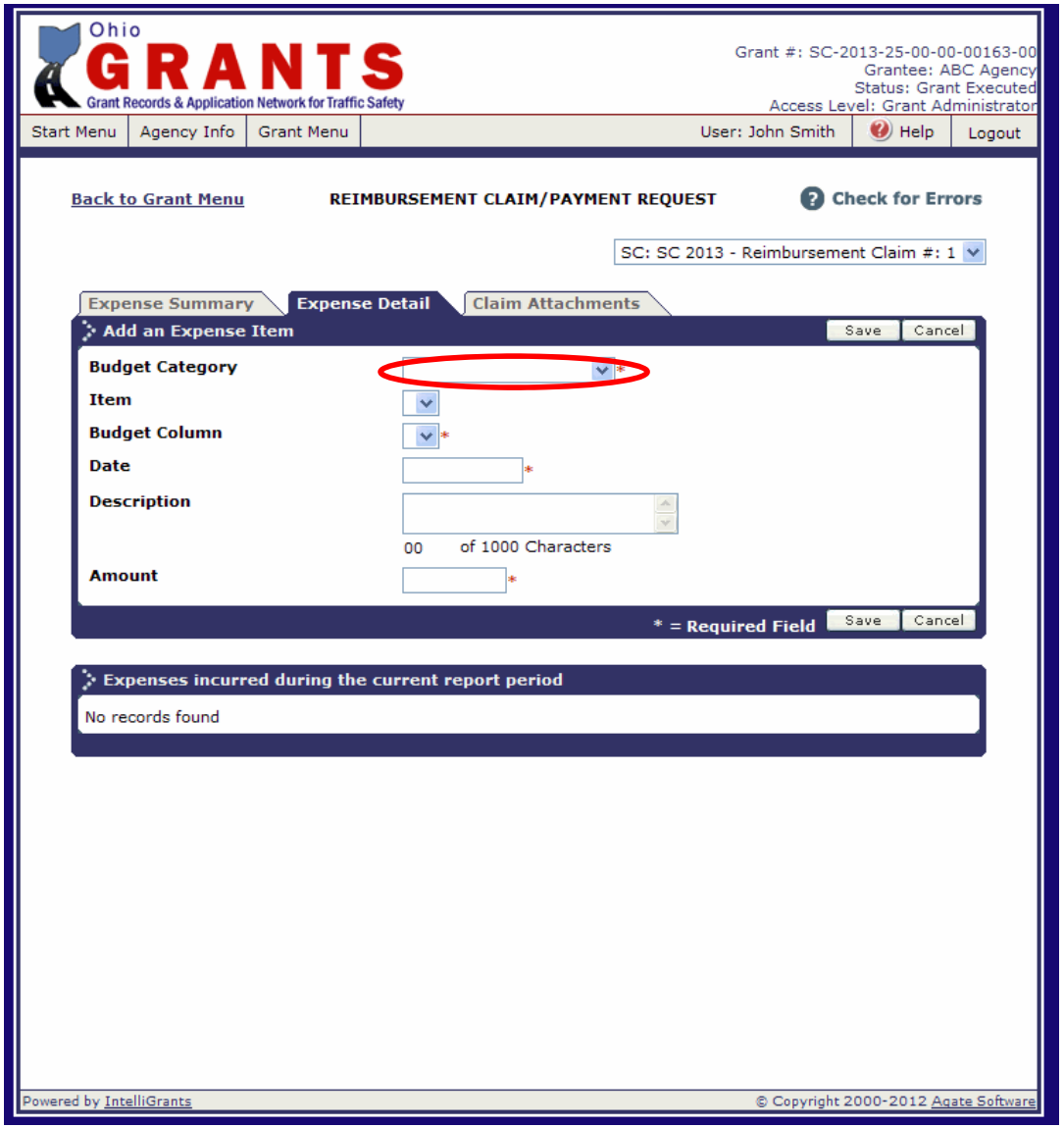


Reimbursement Claim Process

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).

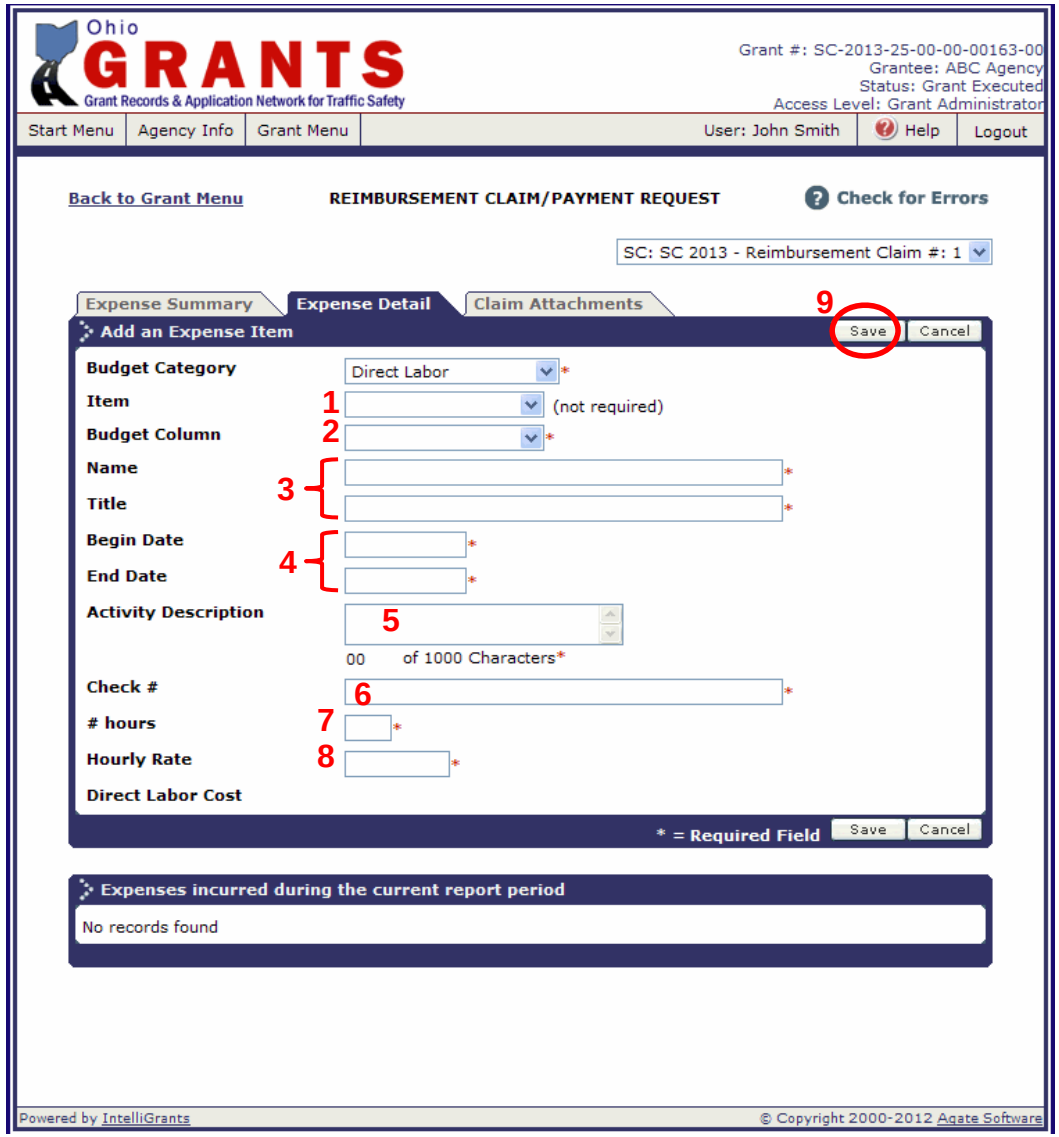
Wait for the page to refresh.



Reimbursement Claim Process

Direct Labor

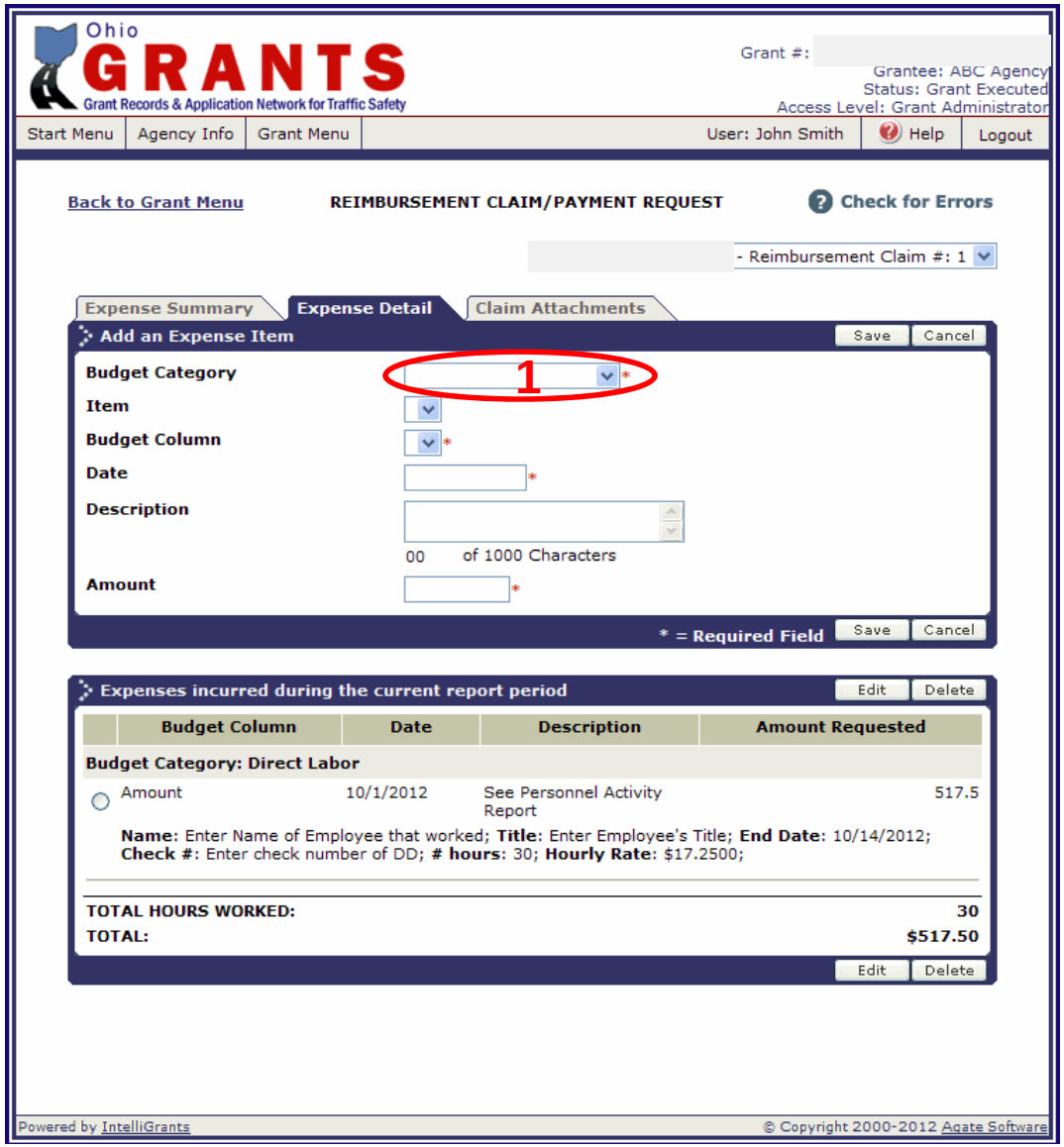
1. Item: Not required
2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.
3. Name/Title – Enter the Employee's Name and Title.
4. Begin Date/End Date – Enter the beginning date and ending dates of the labor that is being claimed.
5. Activity Description – Enter the activity description, or enter "See Personnel Activity Report".
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 hourly rate that the employee was **paid, not the rate entered in the proposal.**
9. Click the "Save" button.



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.

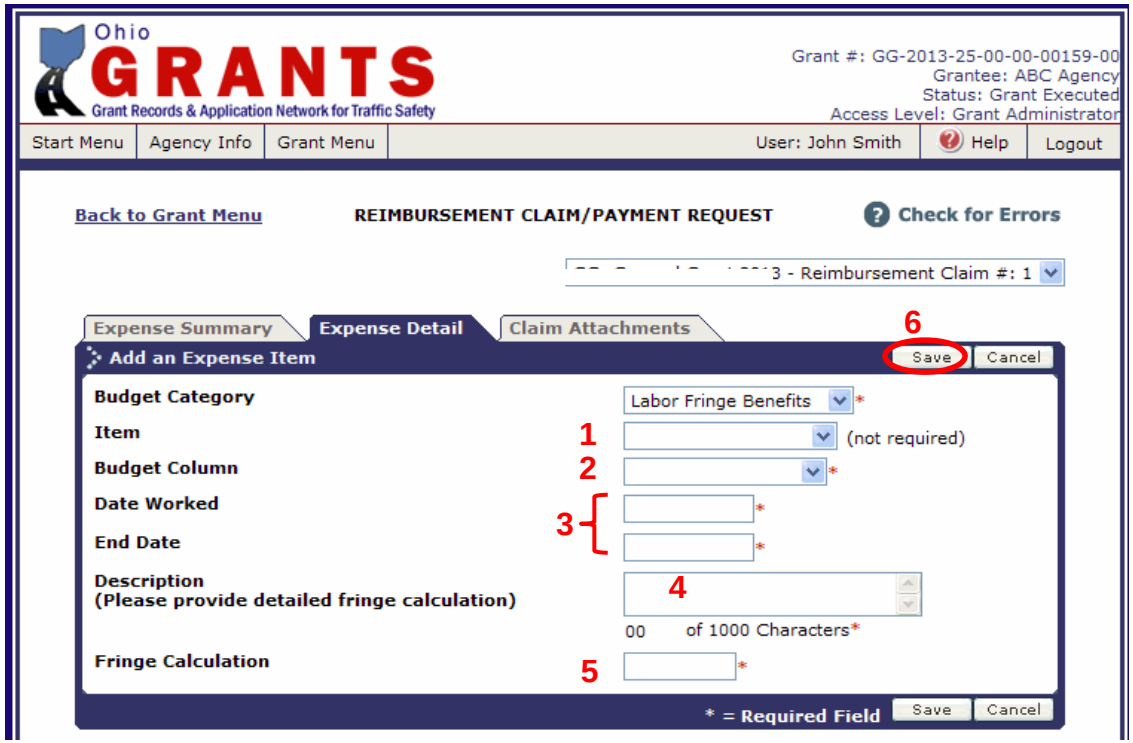


Reimbursement Claim Process

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%.

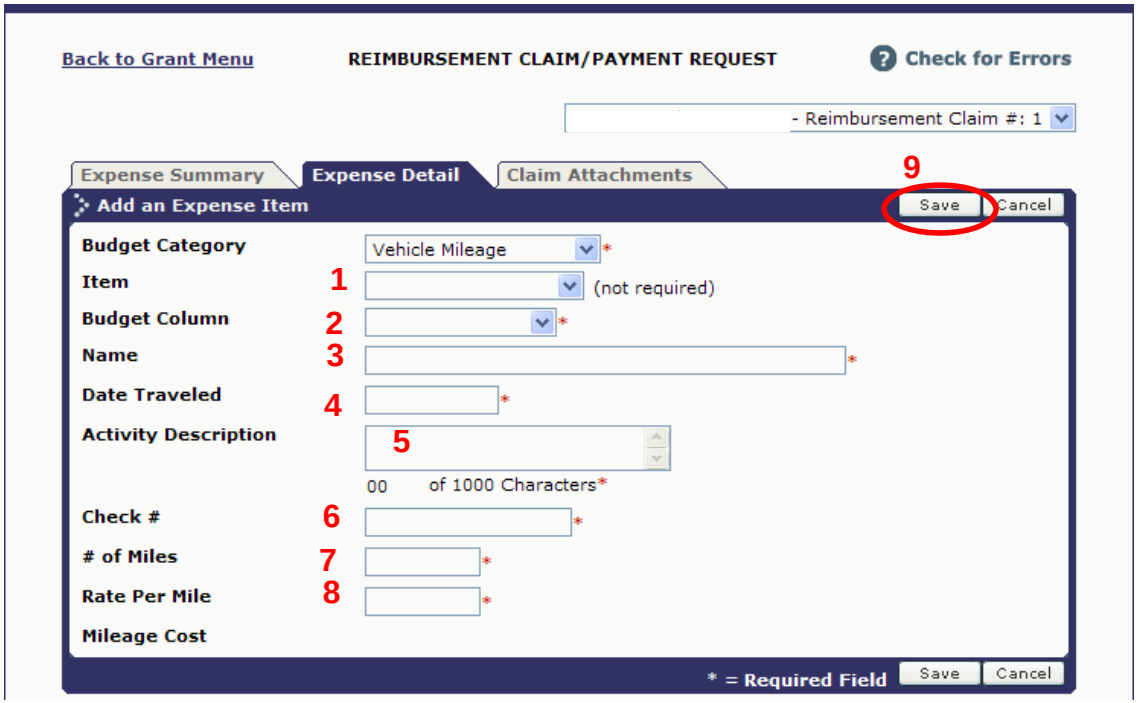


Note: You cannot claim a higher percentage than you have been approved for in the grant. Ex: If you were approved for 21.75%, you cannot claim 24.5% without having a revision approved. You can claim less than you were approved for.

Reimbursement Claim Process

Vehicle Mileage

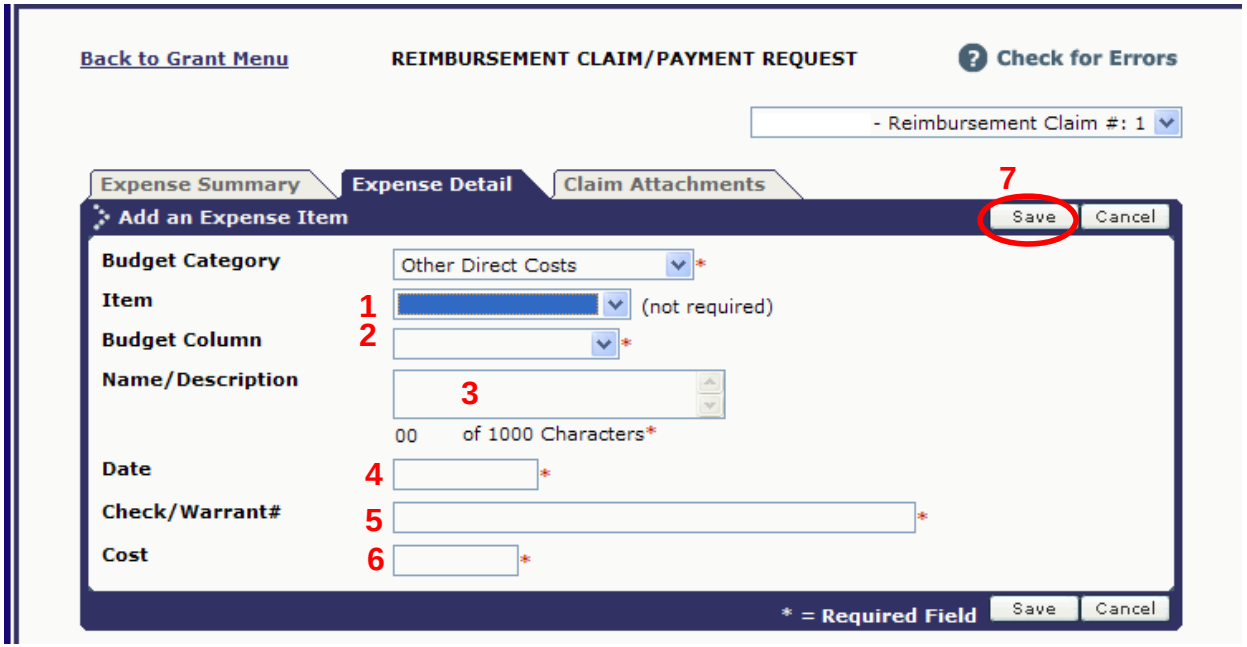
1. Item: Not required.
2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.
3. Name – Enter the name of the employee that claimed the mileage.
4. Date Traveled – Enter the date the travel occurred.
5. Activity Description – Enter the description of where/why the employee traveled or enter “See mileage log”.



6. Check # - Enter the check number issued to reimburse the employee.
7. # of Miles – Enter the number of miles the employee traveled.
8. Rate per Mile – Enter the rate per mile reimbursed to the employee.
9. Click the “Save” button.

Make sure you are not claiming a higher rate than you have been approved for in the grant. If you were approved for $0.50 per mile, you are not allowed to claim $0.55 per mile without having a revision approved. You are allowed to claim less than you were approved for.

Reimbursement Claim Process

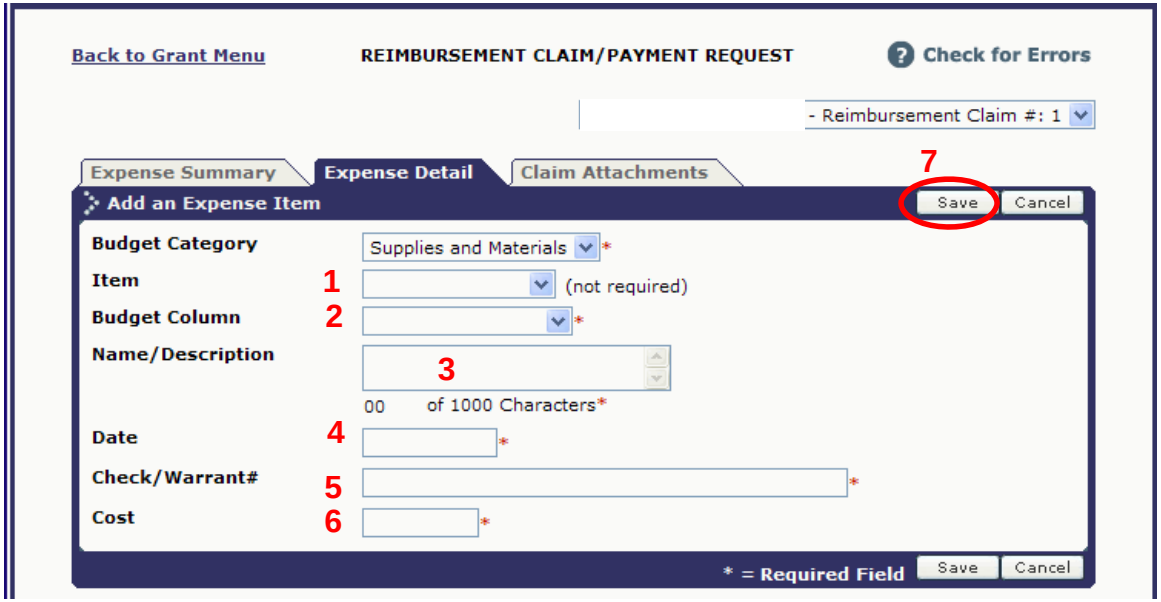


Other Direct Costs

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.

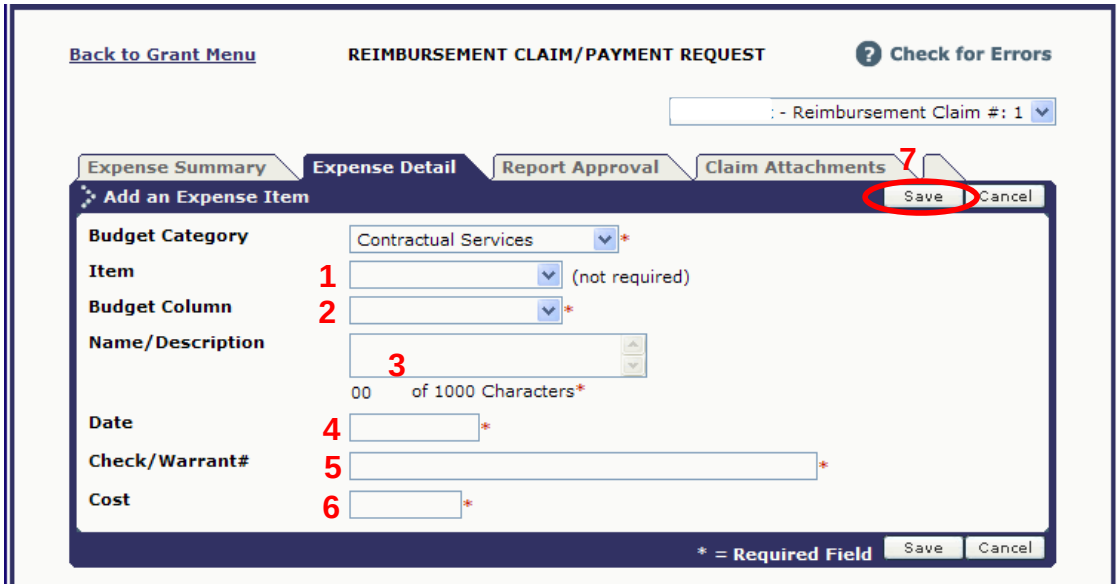
6. Enter the cost of the item.

7. Click the “Save” button.

Reimbursement Claim Process

Contractual Services

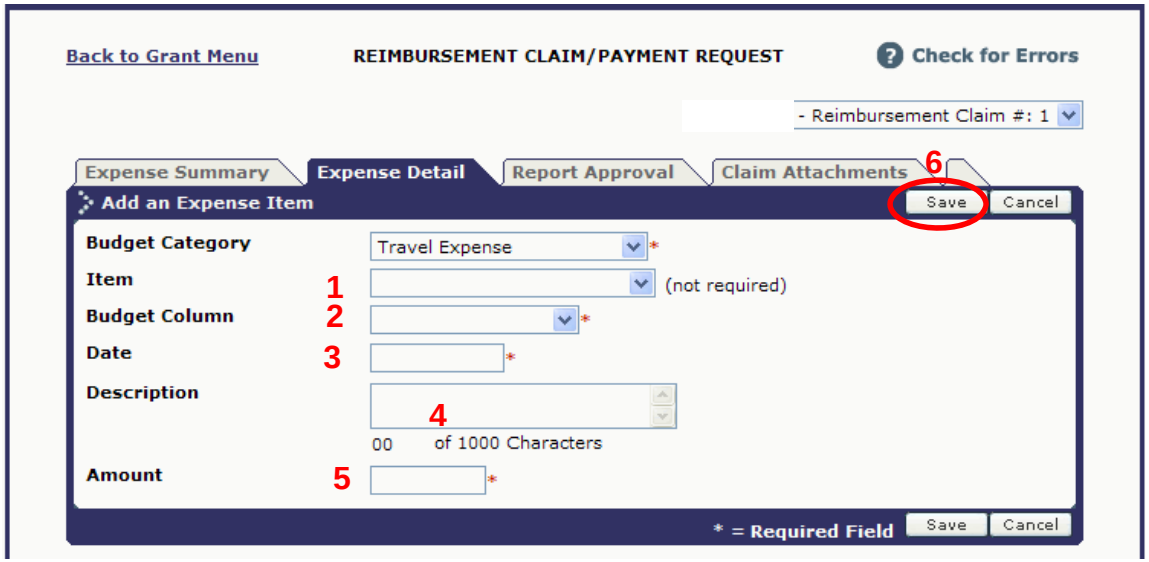
1. Item: Not required, however if you have different line items in this budget category, select the correct line item.
2. Budget Column: Select from the drop down. This will show how much you have remaining in the budget category.
3. Name/Description – Enter the name and a description of the item.
4. 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 pay for the item.
6. Enter the cost of the item.
7. Click the “Save” button.

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

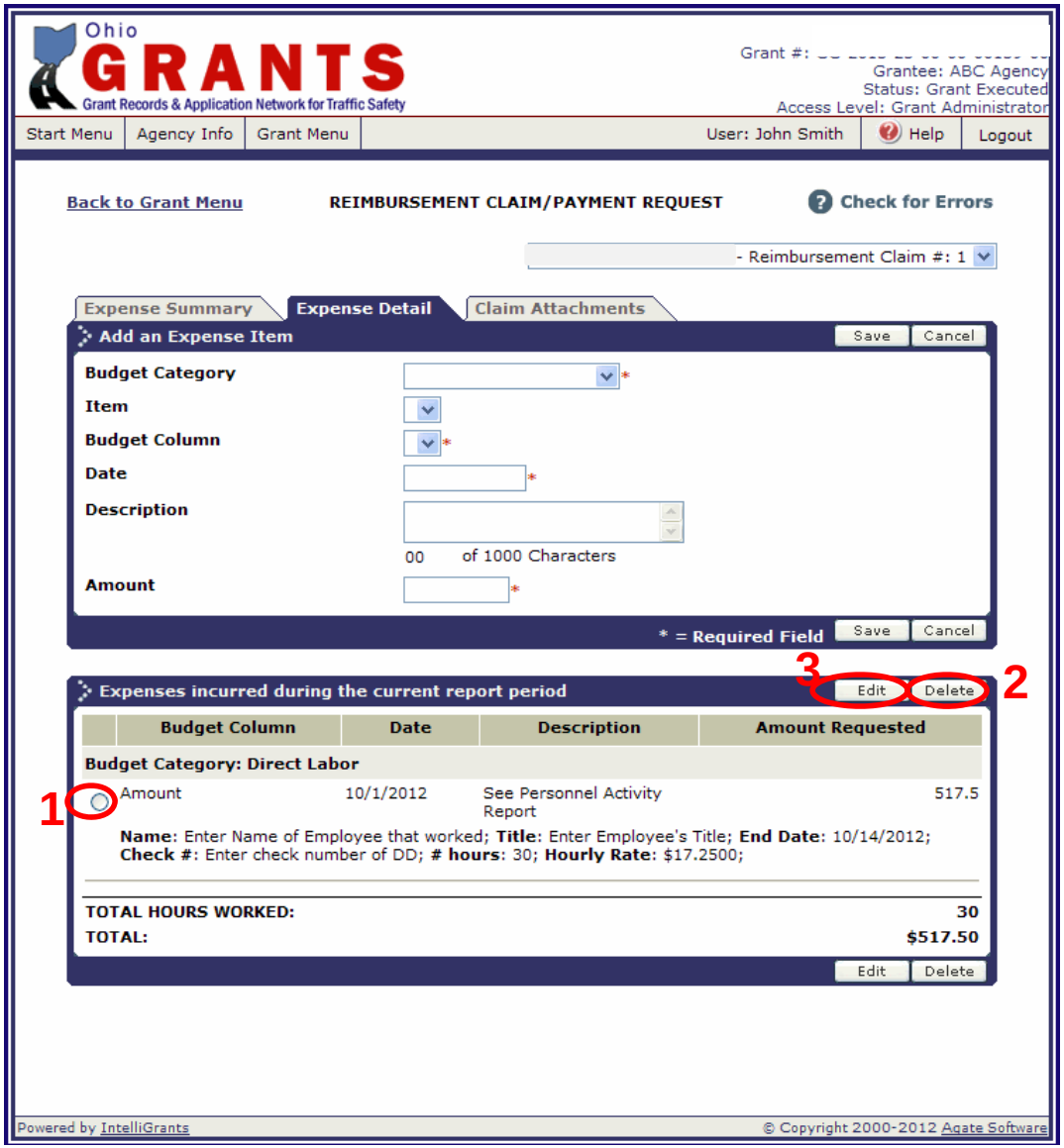
Once all entries have been made, review for accuracy.

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”.

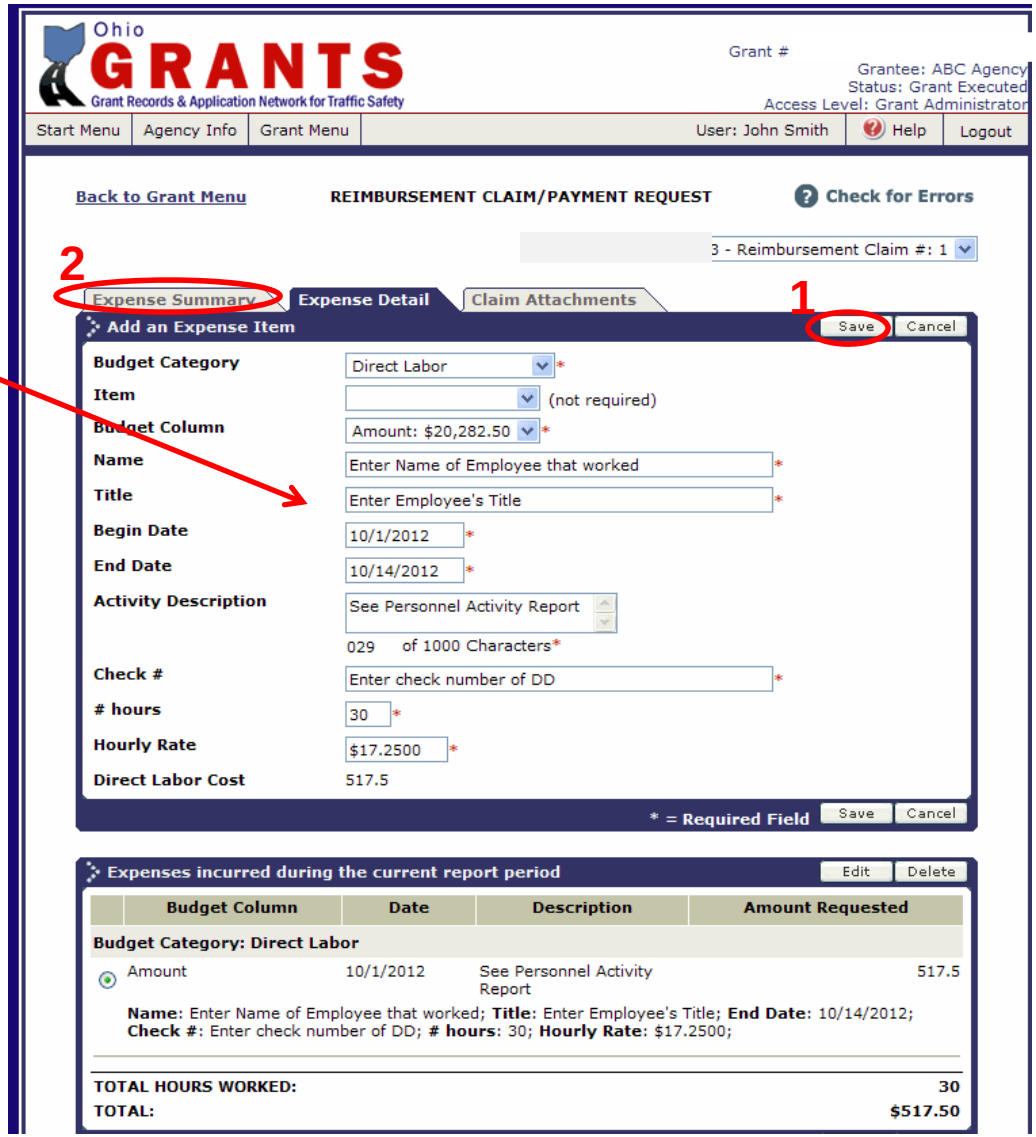


Reimbursement Claim Process

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

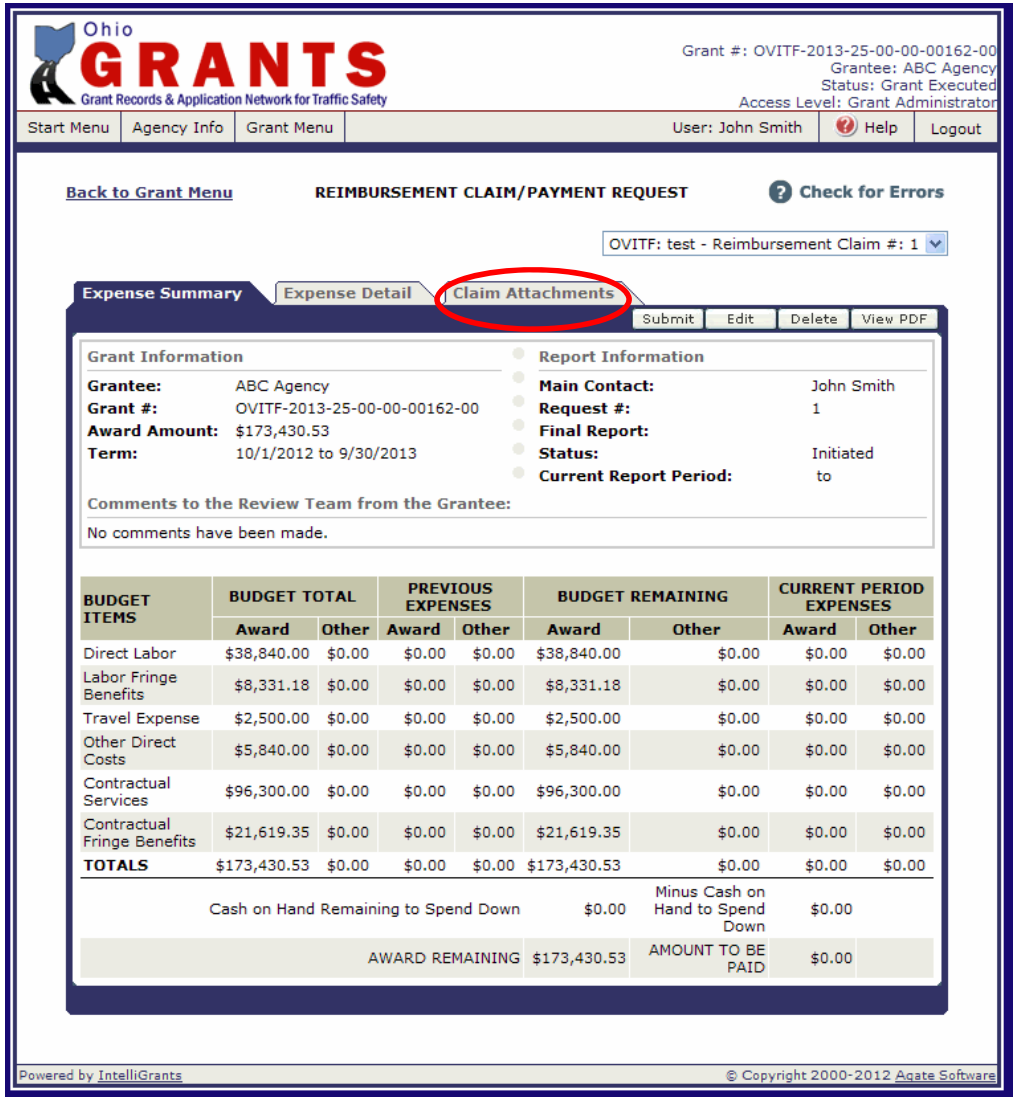
1. Make the necessary changes and click the “Save” button.

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.



BUDGET ITEMS	BUDGET TOTAL		PREVIOUS EXPENSES		BUDGET REMAINING		CURRENT PERIOD EXPENSES	
	Award	Other	Award	Other	Award	Other	Award	Other
Direct Labor	$38,840.00	$0.00	$0.00	$0.00	$38,840.00	$0.00	$0.00	$0.00
Labor Fringe Benefits	$8,331.18	$0.00	$0.00	$0.00	$8,331.18	$0.00	$0.00	$0.00
Travel Expense	$2,500.00	$0.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$0.00
Other Direct Costs	$5,840.00	$0.00	$0.00	$0.00	$5,840.00	$0.00	$0.00	$0.00
Contractual Services	$96,300.00	$0.00	$0.00	$0.00	$96,300.00	$0.00	$0.00	$0.00
Contractual Fringe Benefits	$21,619.35	$0.00	$0.00	$0.00	$21,619.35	$0.00	$0.00	$0.00
TOTALS	$173,430.53	$0.00	$0.00	$0.00	$173,430.53	$0.00	$0.00	$0.00

Reimbursement Claim Process

Click “Add”.

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.

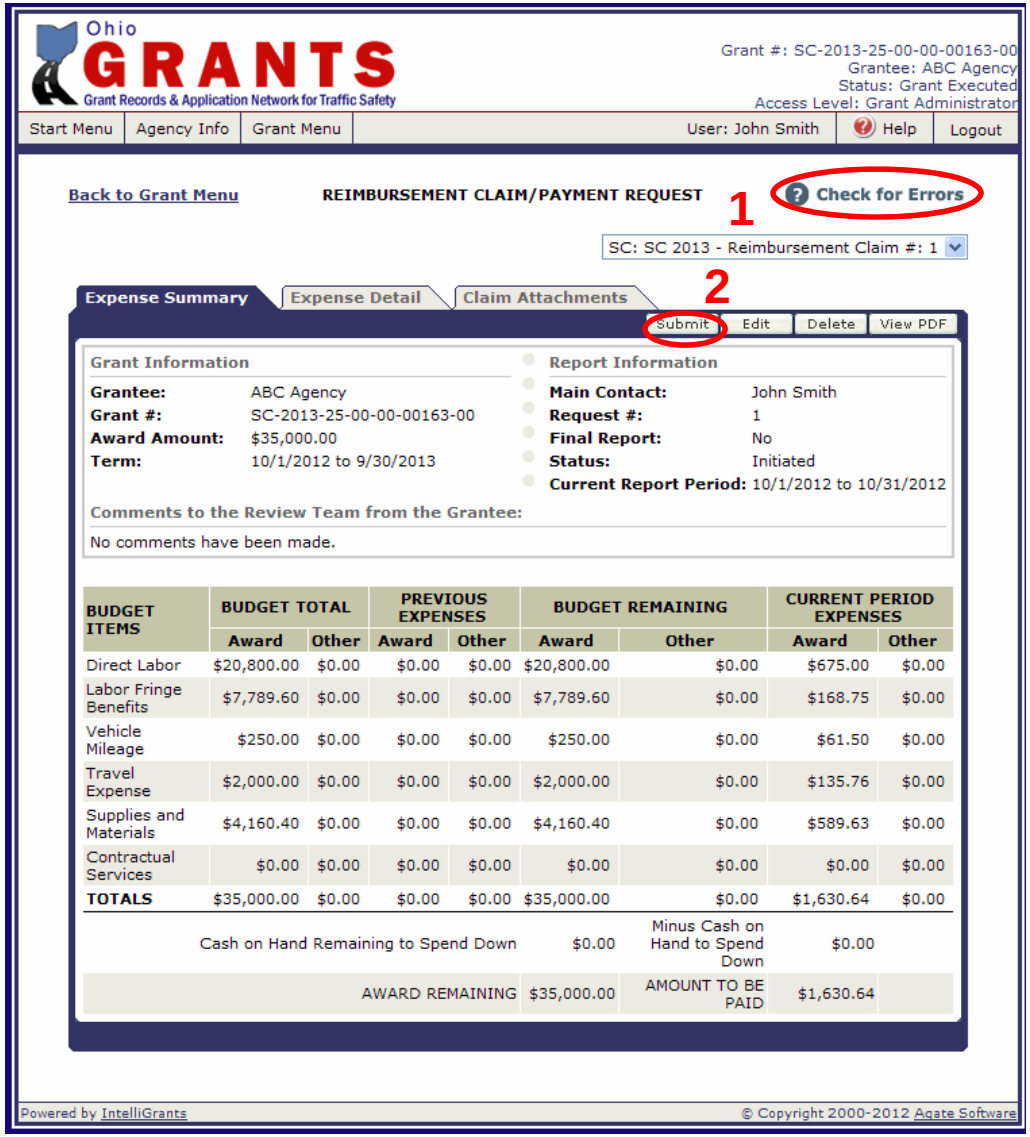
1. Click “Check for Errors” to see if there are any system errors to fix prior to submitting.

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.

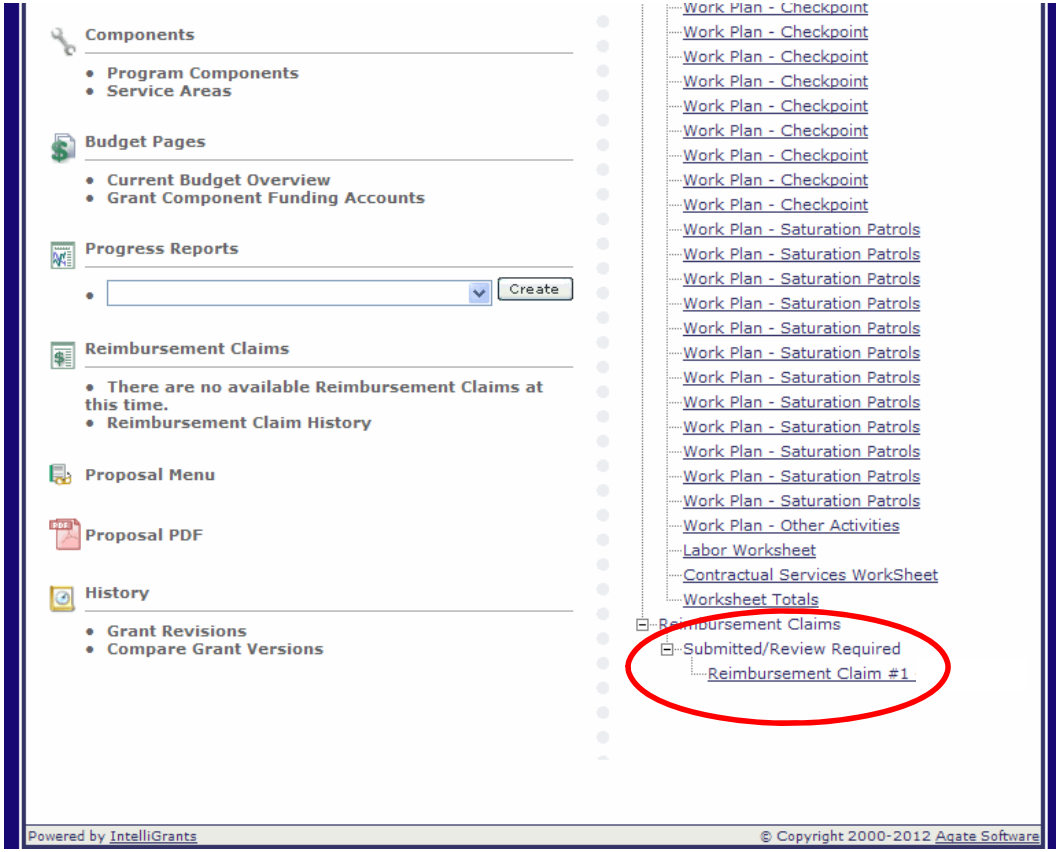
You will be asked to enter your password.



BUDGET ITEMS	BUDGET TOTAL		PREVIOUS EXPENSES		BUDGET REMAINING		CURRENT PERIOD EXPENSES	
	Award	Other	Award	Other	Award	Other	Award	Other
Direct Labor	$20,800.00	$0.00	$0.00	$0.00	$20,800.00	$0.00	$675.00	$0.00
Labor Fringe Benefits	$7,789.60	$0.00	$0.00	$0.00	$7,789.60	$0.00	$168.75	$0.00
Vehicle Mileage	$250.00	$0.00	$0.00	$0.00	$250.00	$0.00	$61.50	$0.00
Travel Expense	$2,000.00	$0.00	$0.00	$0.00	$2,000.00	$0.00	$135.76	$0.00
Supplies and Materials	$4,160.40	$0.00	$0.00	$0.00	$4,160.40	$0.00	$589.63	$0.00
Contractual Services	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
TOTALS	$35,000.00	$0.00	$0.00	$0.00	$35,000.00	$0.00	$1,630.64	$0.00
	Cash on Hand Remaining to Spend Down				$0.00	Minus Cash on Hand to Spend Down	$0.00	
				AWARD REMAINING	$35,000.00	AMOUNT TO BE PAID	$1,630.64	

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.

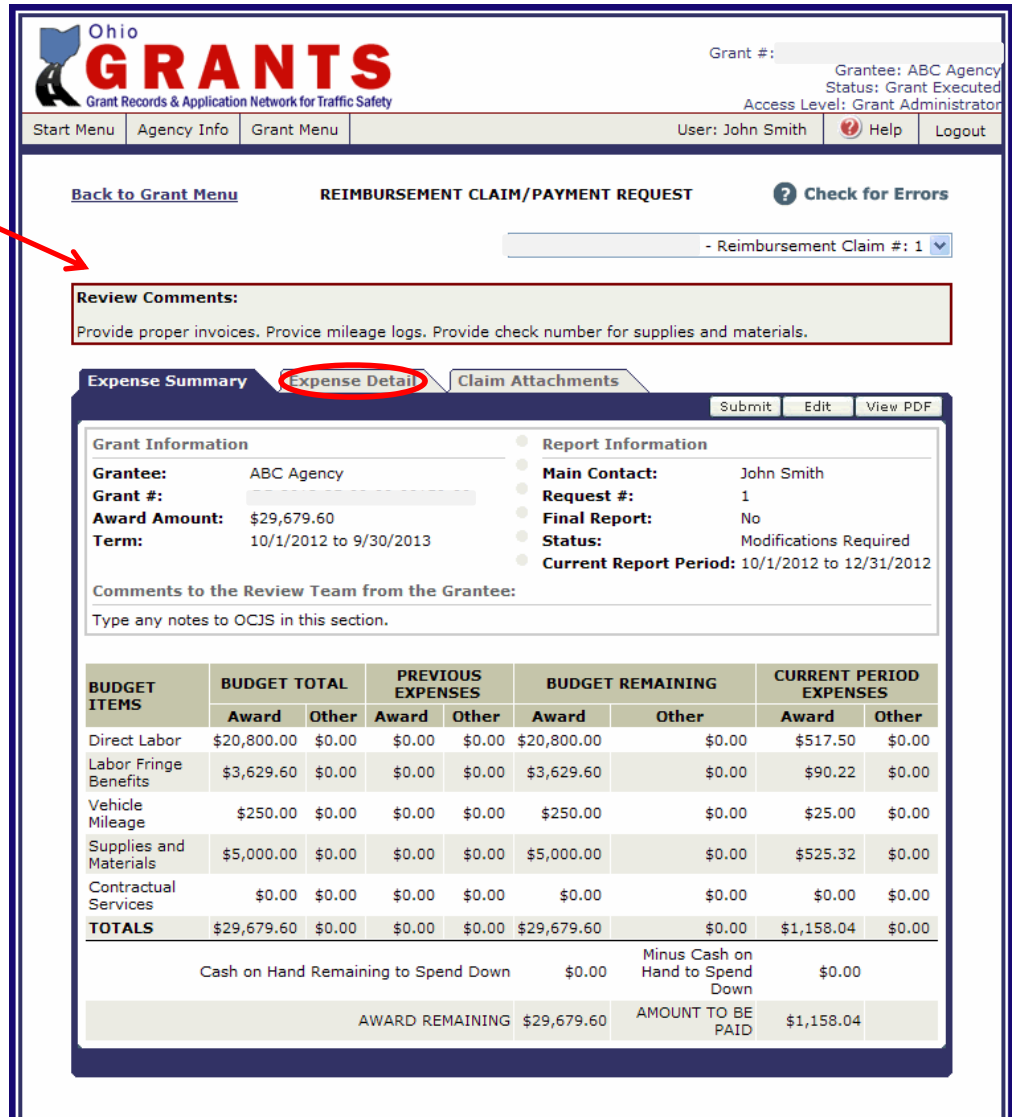
Note: If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.ohio.gov are being blocked as spam.

Reimbursement Claim Modification

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

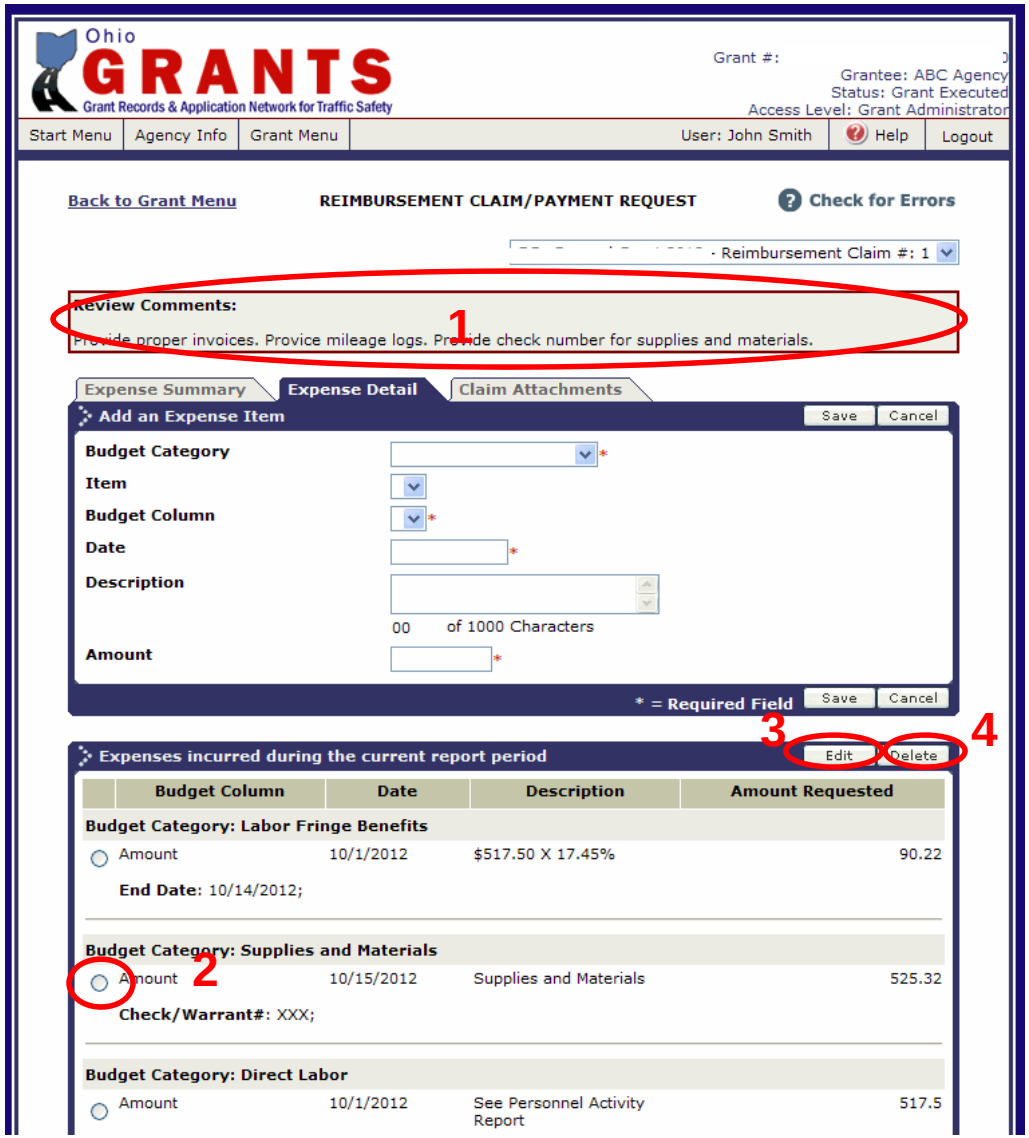
Click on Expense Detail to make the corrections.

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



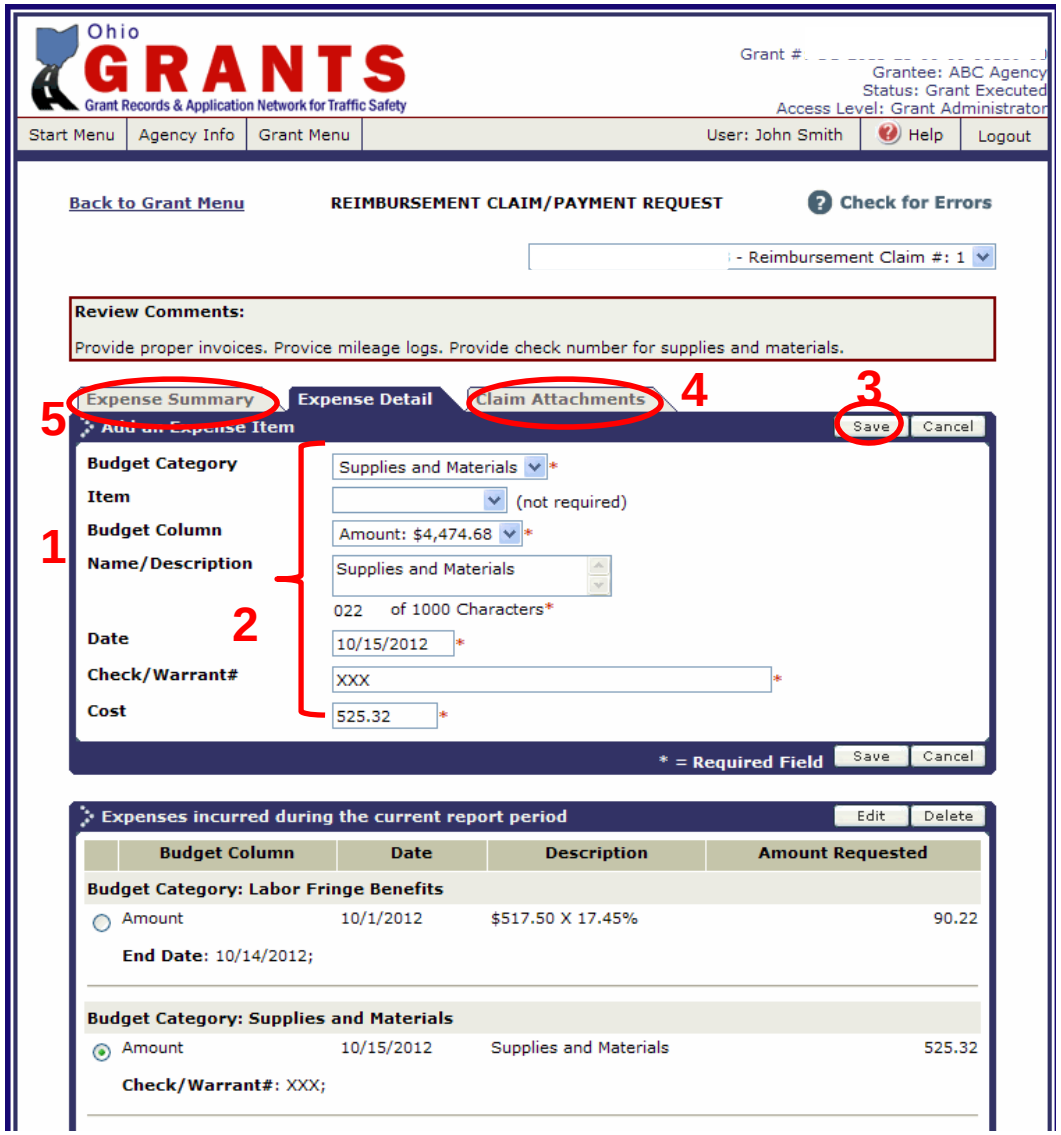
Expense Detail Modifications

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”.



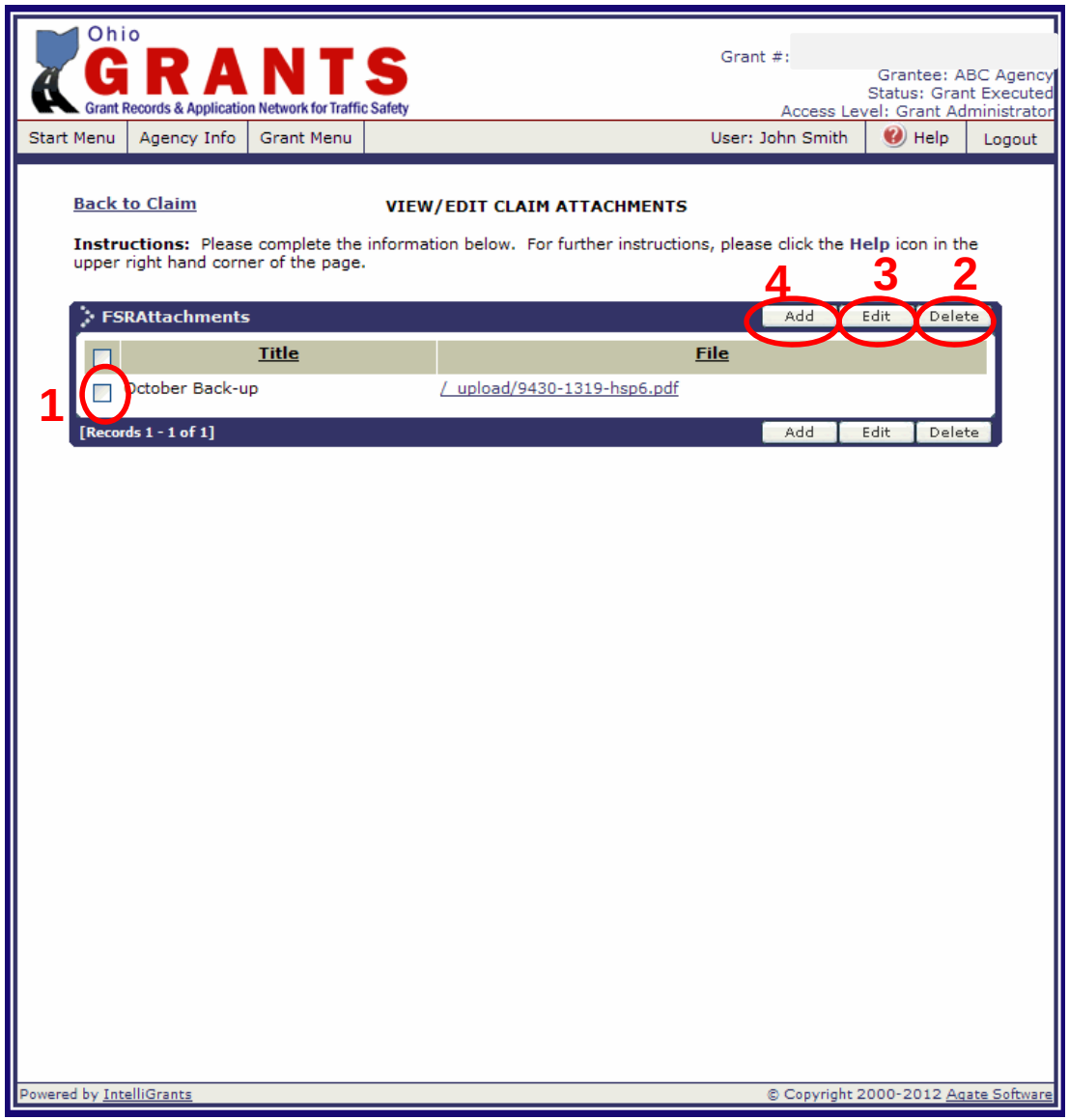
Expense Detail Modifications

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”.



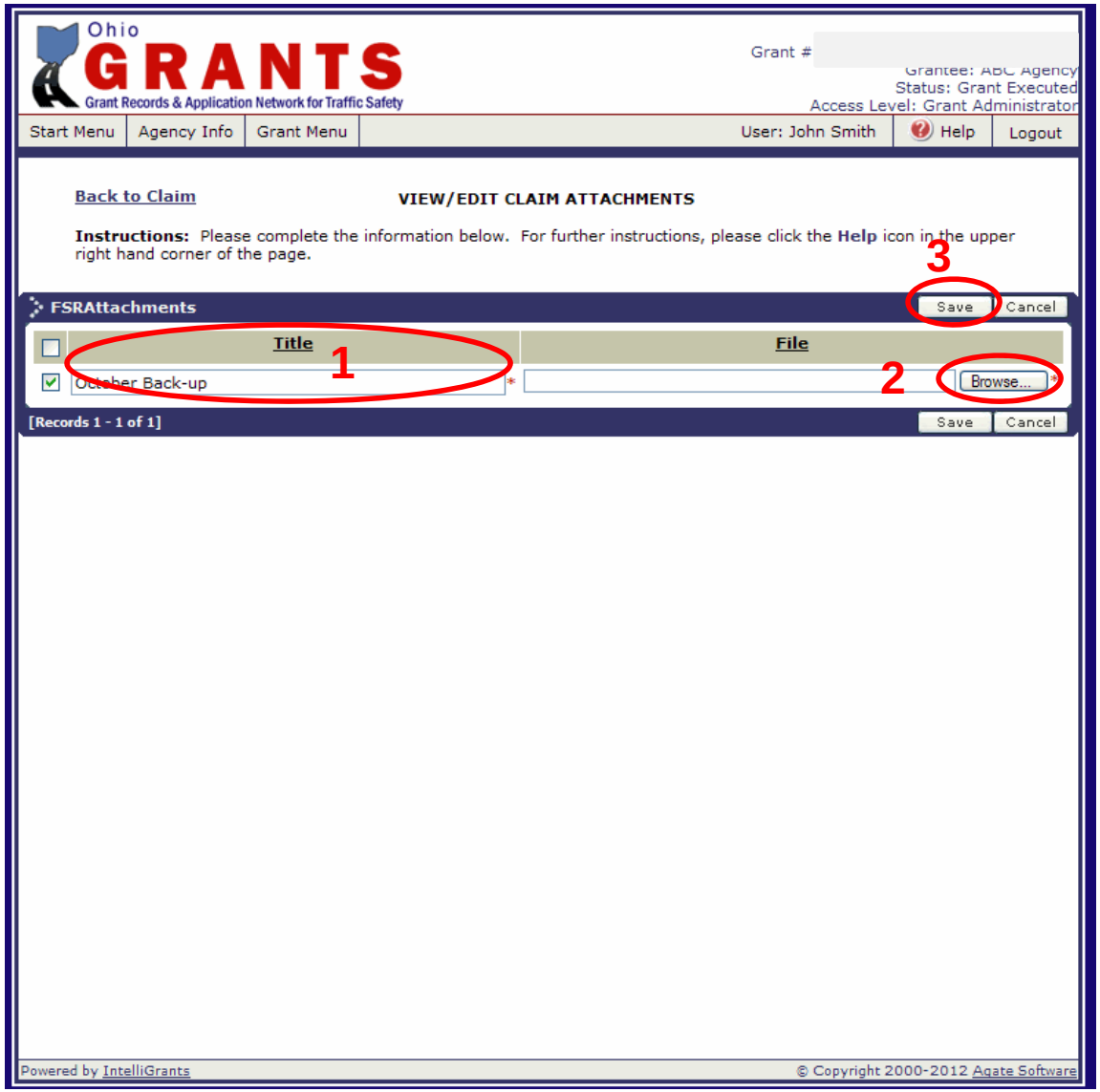
Claim Attachment Modifications

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”.



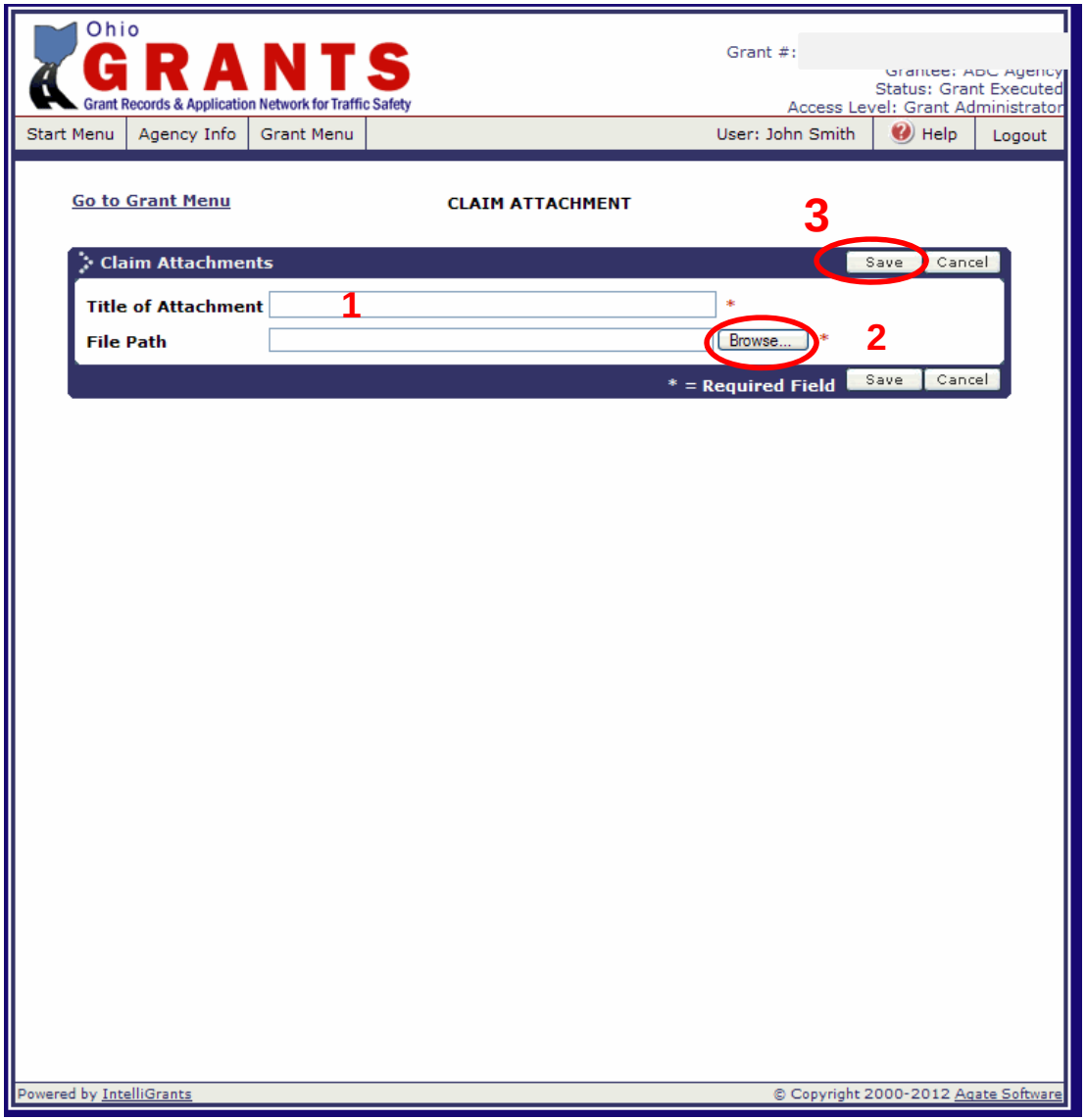
Claim Attachment Edit

1. Change the title, or
2. Attach a new file by clicking "Browse".
3. Click "Save".



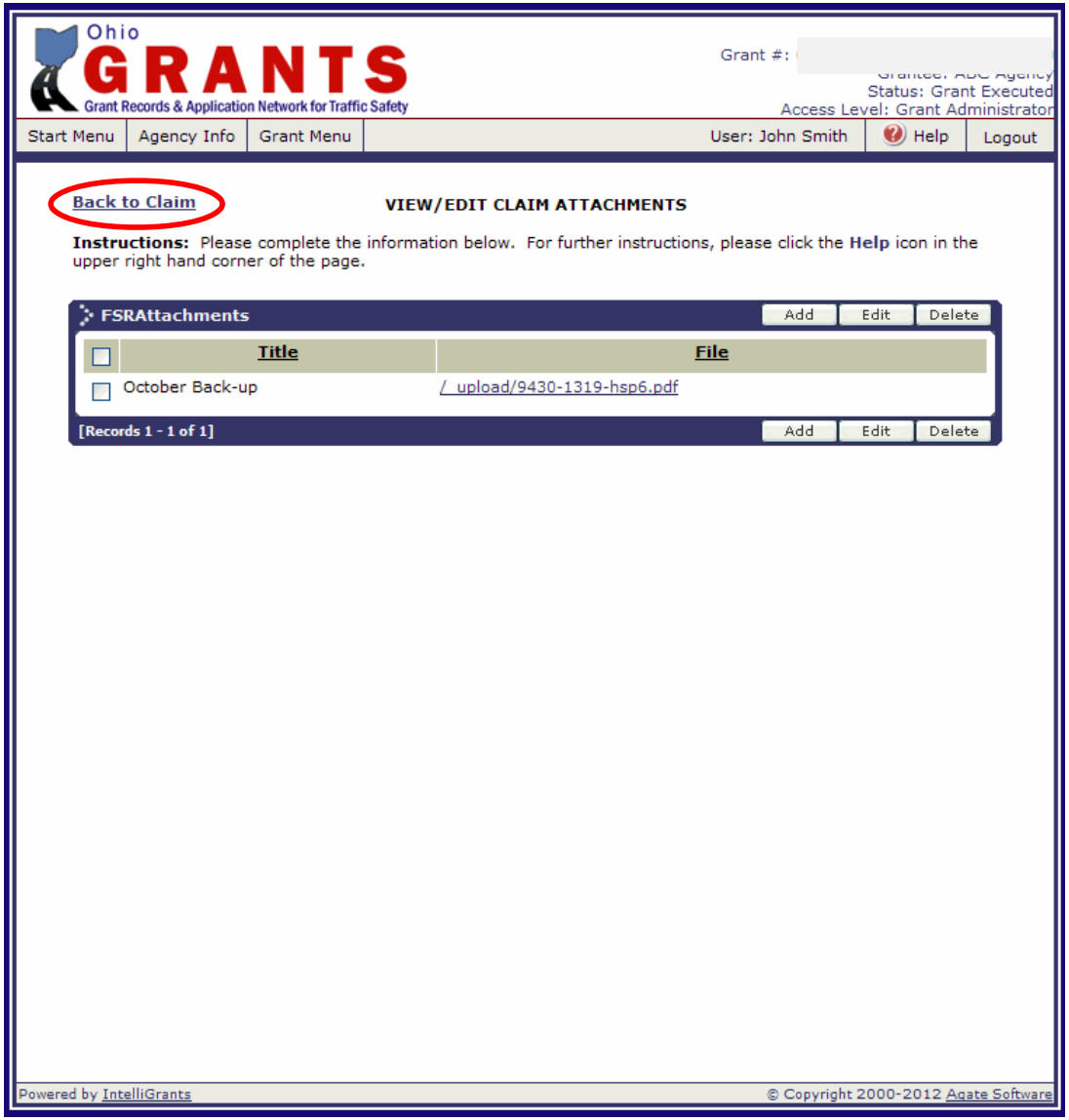
Claim Attachment Add

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



Claim Attachment Modification

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



Reimbursement Claim Modifications

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

Ohio GRANTS
Grant Records & Application Network for Traffic Safety

Grant #:
Grantee: ABC Agency
Status: Grant Executed
Access Level: Grant Administrator

Start Menu | Agency Info | Grant Menu | User: John Smith | Help | Logout

Back to Grant Menu — REIMBURSEMENT CLAIM/PAYMENT REQUEST — Check for Errors

- Reimbursement Claim #: 1

Review Comments:

Provide proper invoices. Provice mileage logs. Provide check number for supplies and materials.

Expense Summary | Expense Detail | Claim Attachments

Submit | Edit | View PDF

Grant Information

Grantee: ABC Agency
Grant #:
Award Amount: $29,679.60
Term: 10/1/2012 to 9/30/2013

Report Information

Main Contact: John Smith
Request #: 1
Final Report: No
Status: Modifications Required
Current Report Period: 10/1/2012 to 12/31/2012

Comments to the Review Team from the Grantee:

Type any notes to in this section.

BUDGET ITEMS	BUDGET TOTAL		PREVIOUS EXPENSES		BUDGET REMAINING		CURRENT PERIOD EXPENSES	
	Award	Other	Award	Other	Award	Other	Award	Other
Direct Labor	$20,800.00	$0.00	$0.00	$0.00	$20,800.00	$0.00	$517.50	$0.00
Labor Fringe Benefits	$3,629.60	$0.00	$0.00	$0.00	$3,629.60	$0.00	$90.22	$0.00
Vehicle Mileage	$250.00	$0.00	$0.00	$0.00	$250.00	$0.00	$25.00	$0.00
Supplies and Materials	$5,000.00	$0.00	$0.00	$0.00	$5,000.00	$0.00	$525.32	$0.00
Contractual Services	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
TOTALS	$29,679.60	$0.00	$0.00	$0.00	$29,679.60	$0.00	$1,158.04	$0.00
	Cash on Hand Remaining to Spend Down				$0.00	Minus Cash on Hand to Spend Down	$0.00	
				AWARD REMAINING	$29,679.60	AMOUNT TO BE PAID	$1,158.04	

Electronic Reimbursement

Reimbursement can be received electronically by going to :

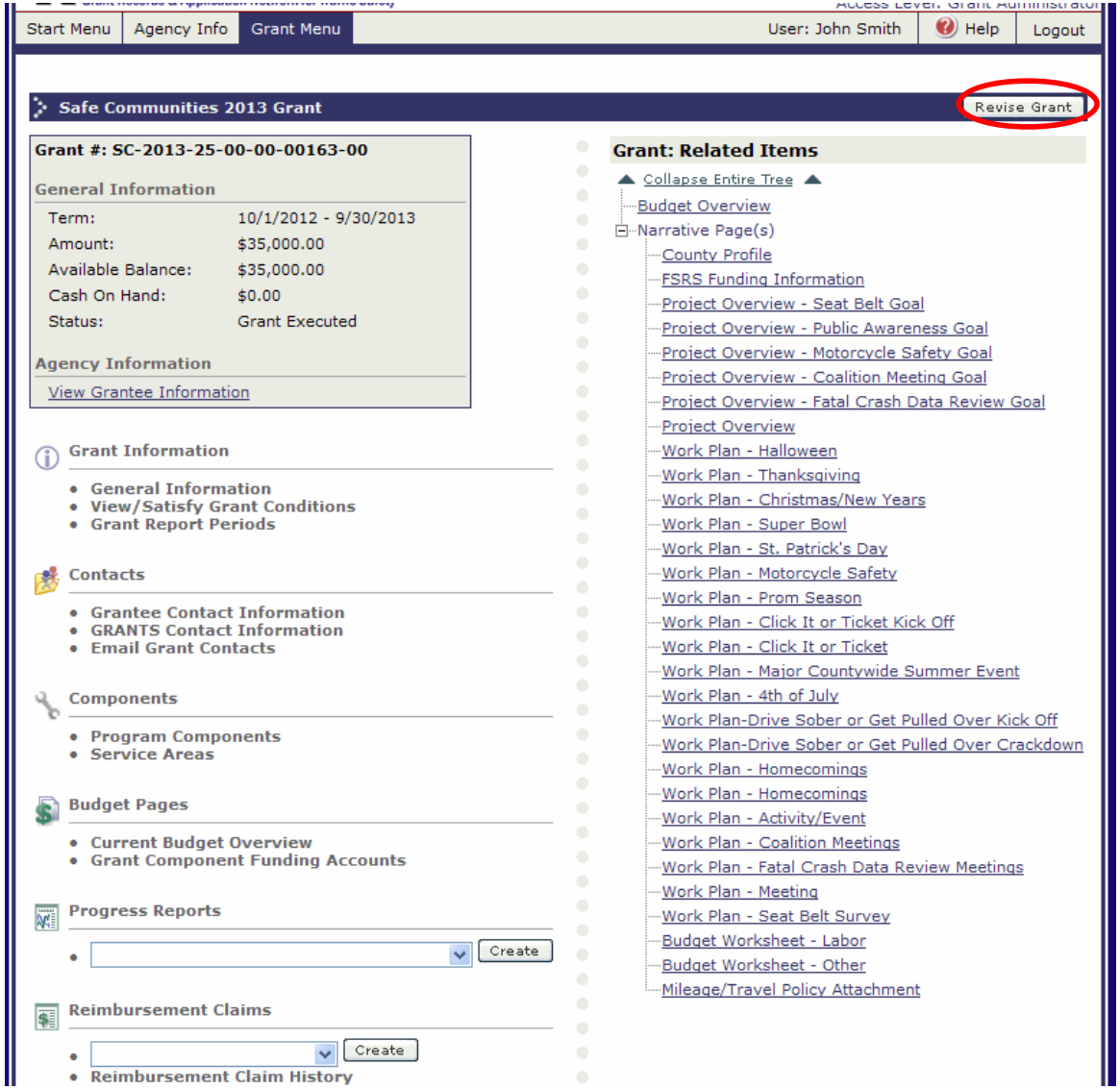
http://ohiosharedservices.ohio.gov/Suppliers.aspx

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

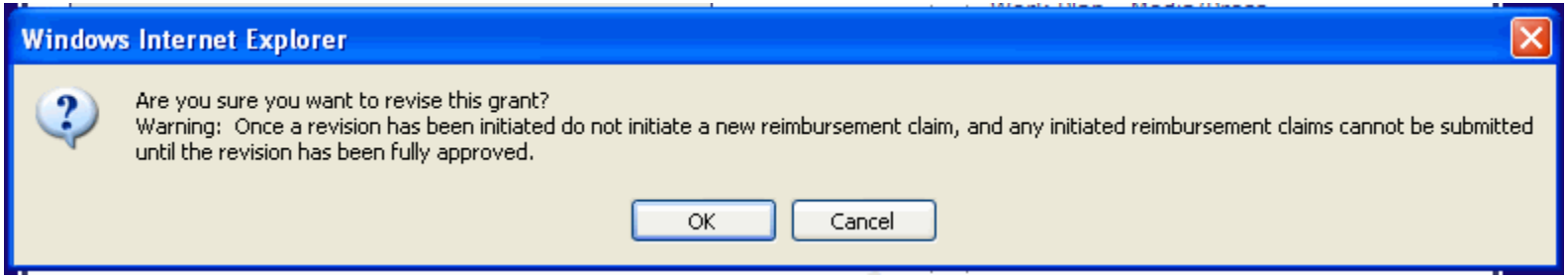
Revision Process

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

To initiate a revision, click “Revise Grant”.



Grant Revision



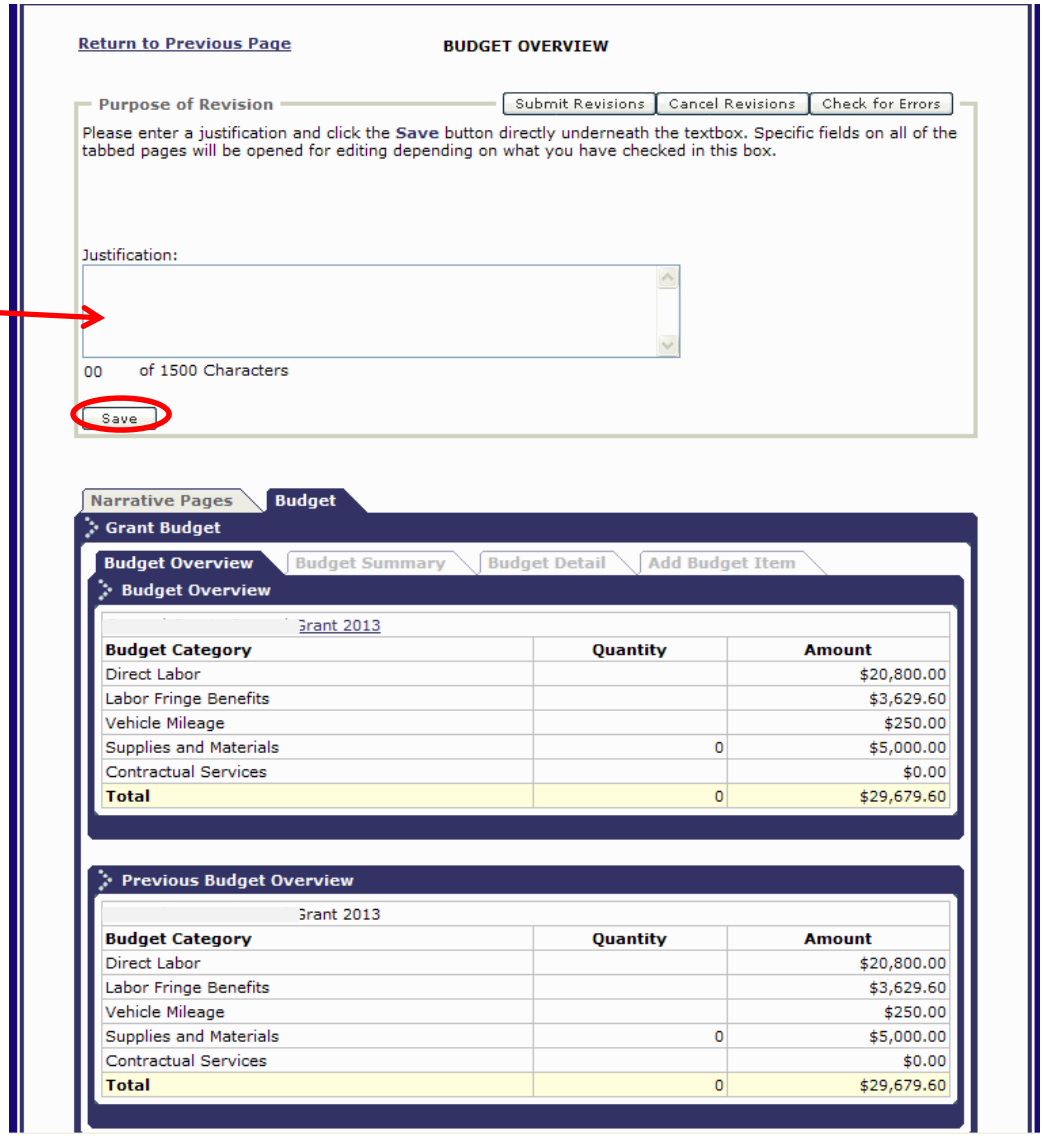
Once you click “Revise Grant”, you will receive this warning message:

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

Grant Revision

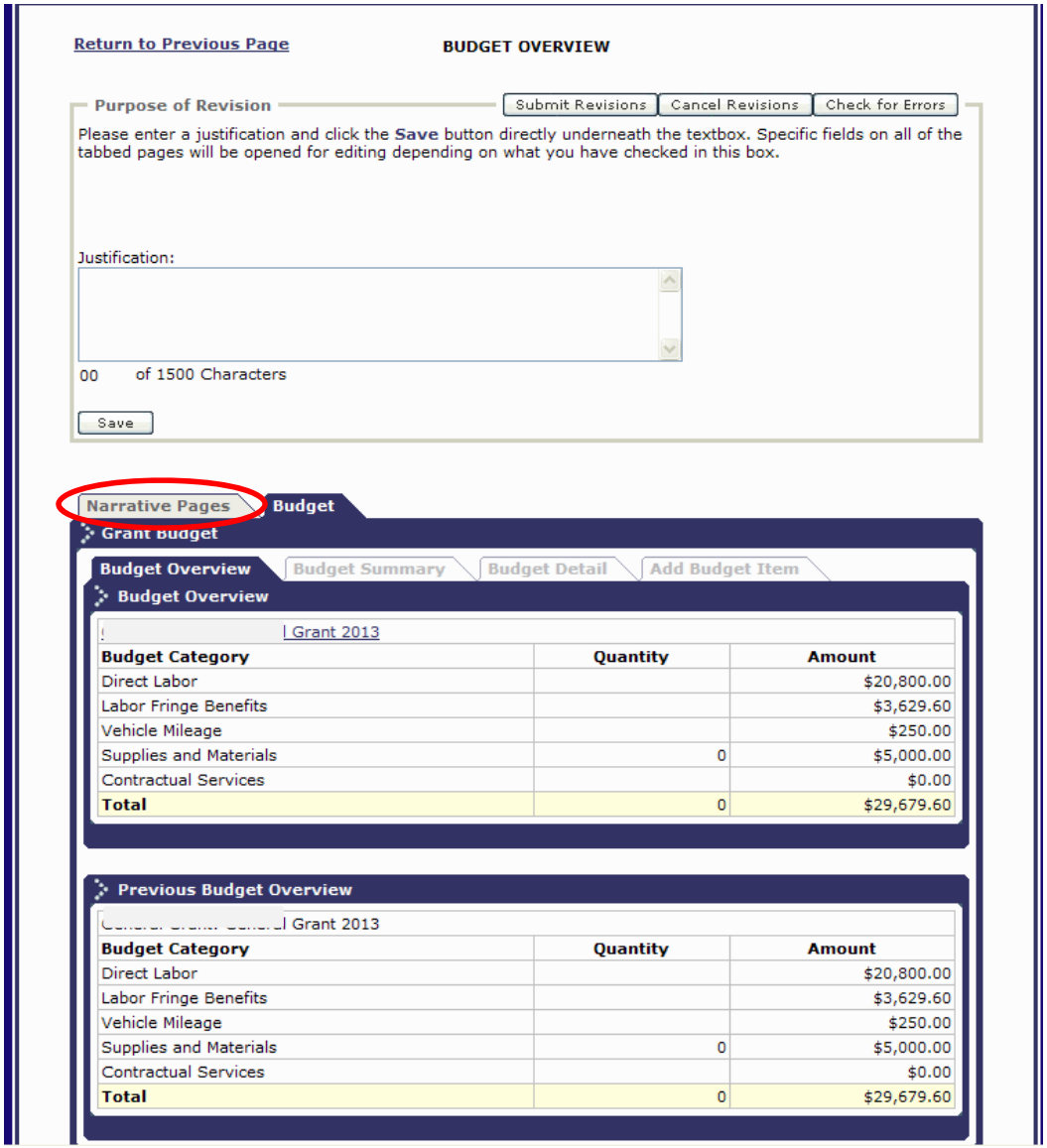
The Budget Overview page has the Justification. All changes you are making to the grant need to be listed in this box. Ex: Moved 20 hours from Christmas to St. Patrick's Day. Moved $1,500.00 from Supplies and Materials to Other Direct Costs.

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 (County Profile, FSRS Funding Information, Project Overviews (Goals), Work Plans, Budget Worksheet –Labor, Budget Worksheet – Other), click “Narrative Pages” tab.

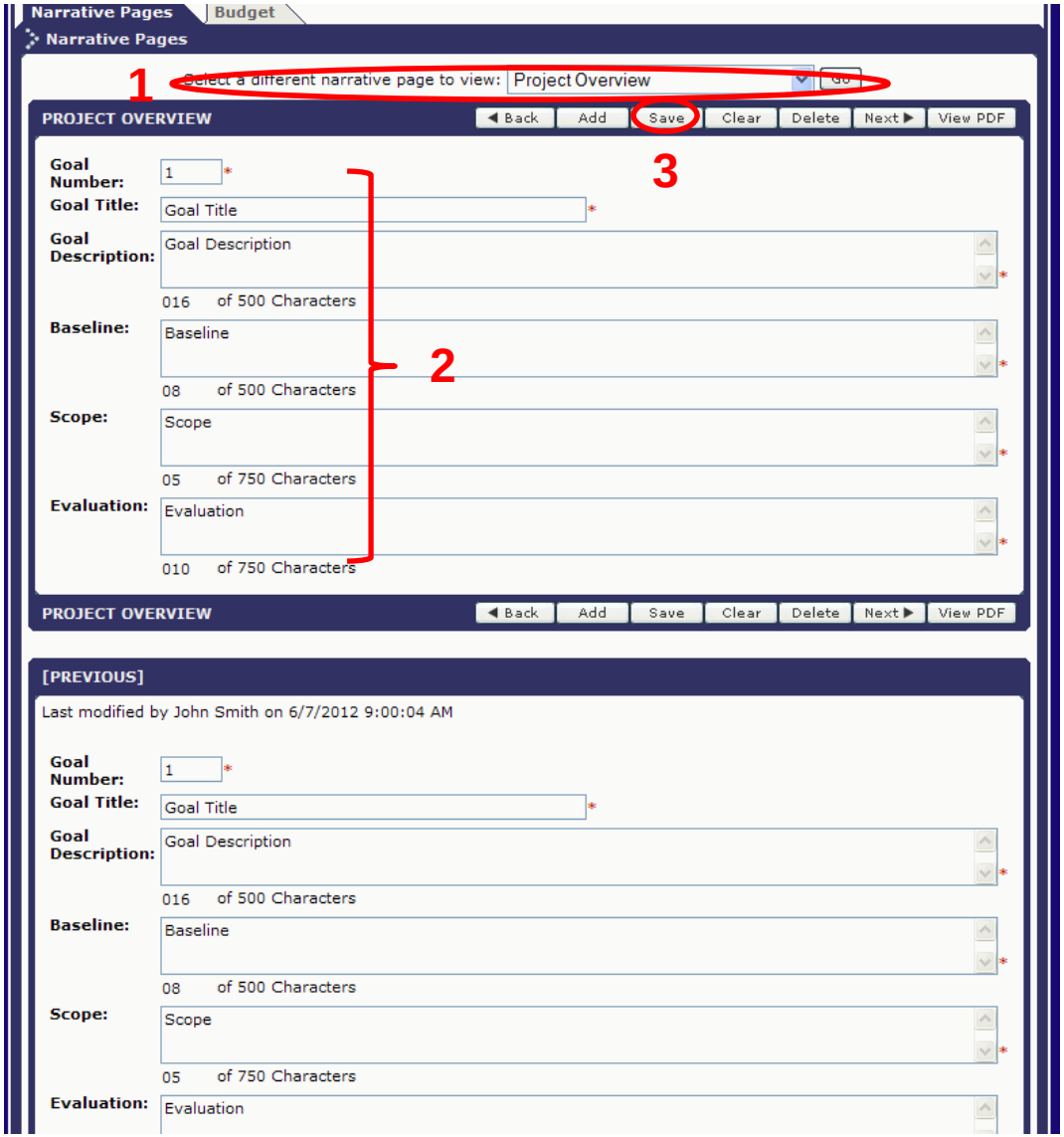


Narrative Page Revisions

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

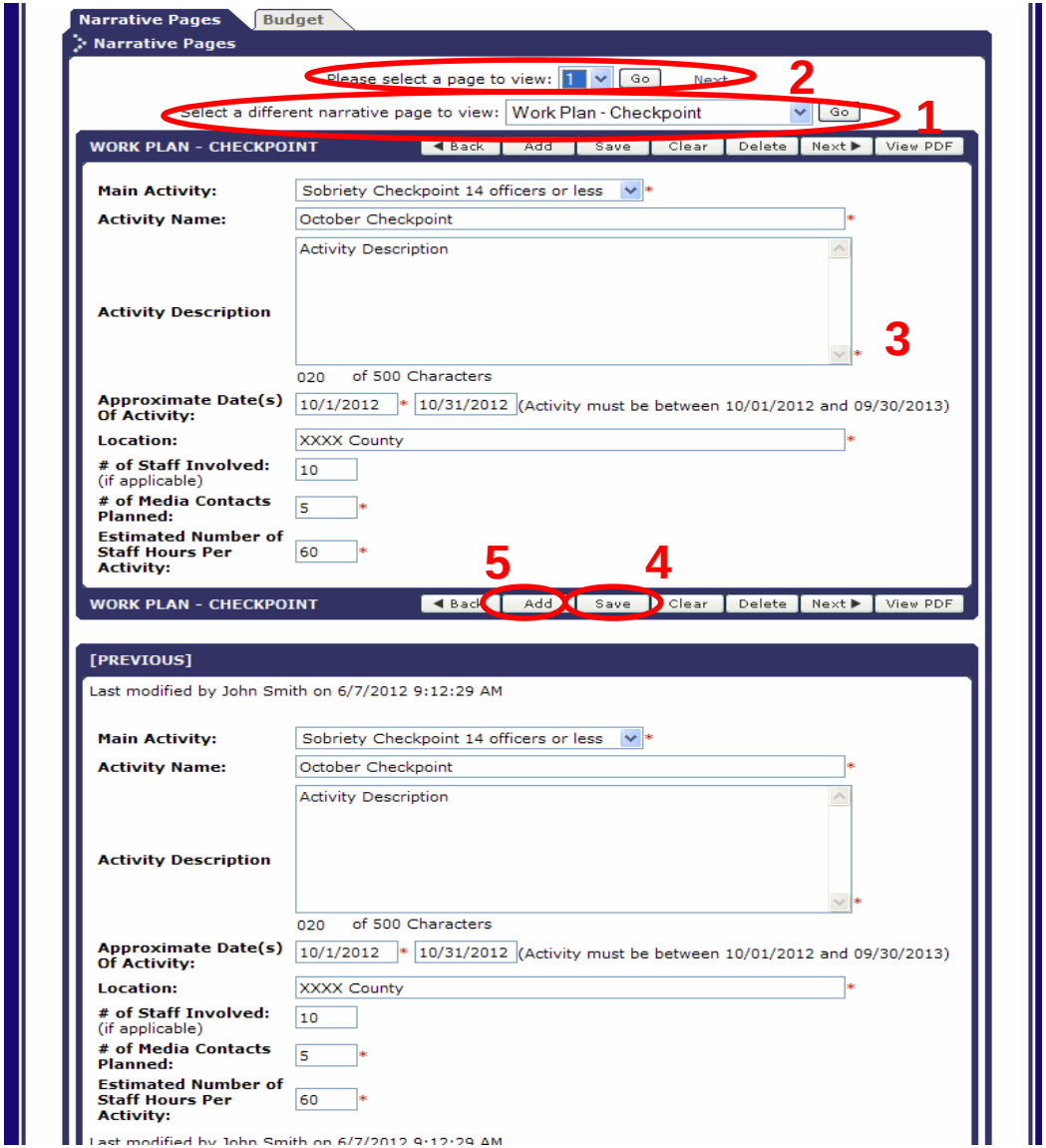
Once it pulls up the information from the grant, you will see the information in two boxes. The bottom box is what was in the grant previously.

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



Narrative Page Revisions

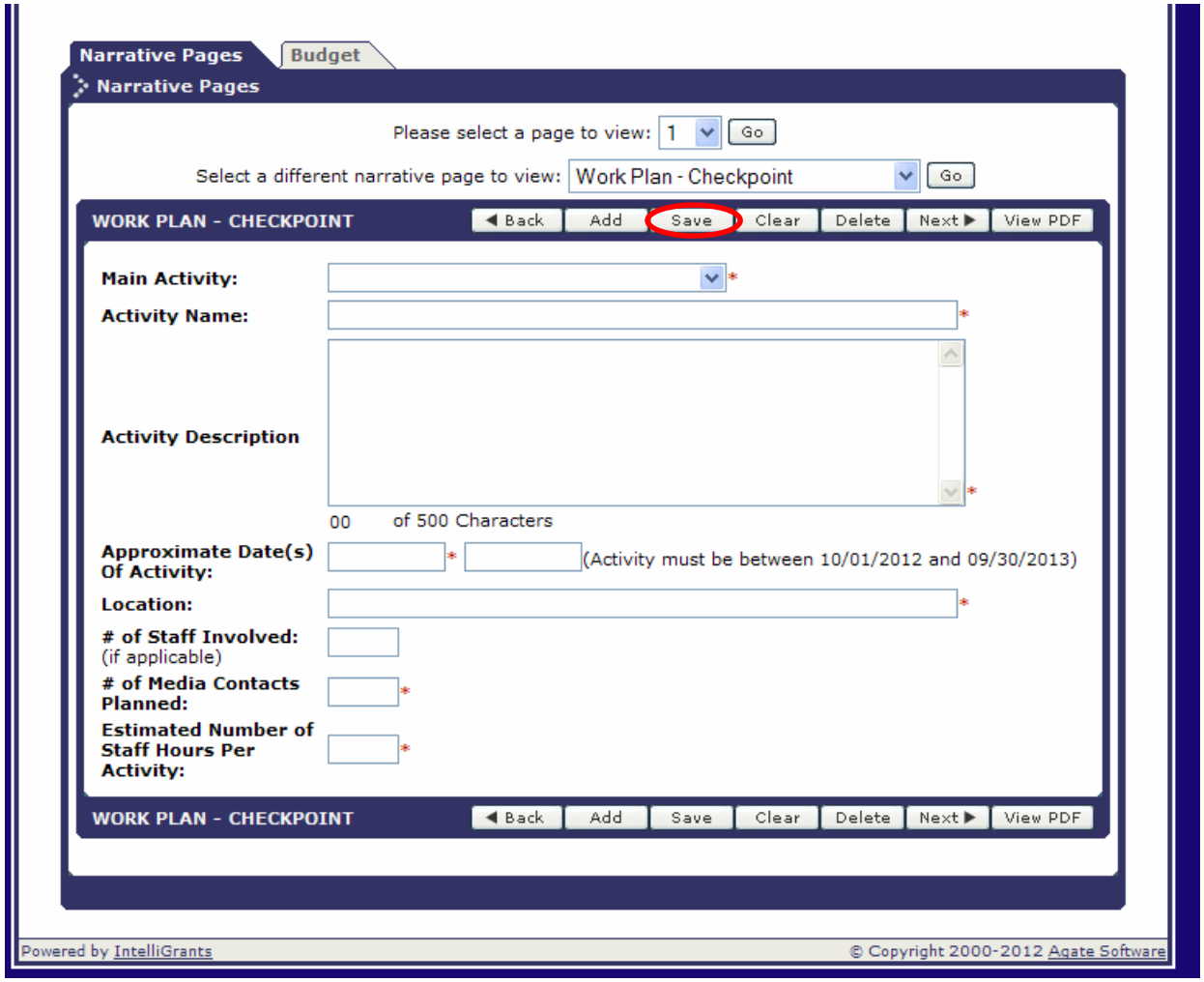
1. To select another Narrative Page, choose the name and click “go”.
2. If that page has multiple pages, select the one from the drop down and click “go” or click “next” to scroll through.
3. Again, make changes in the top box.
4. Click “Save”.
5. If you need to add a new page, click “add”.



Narrative Page Revisions

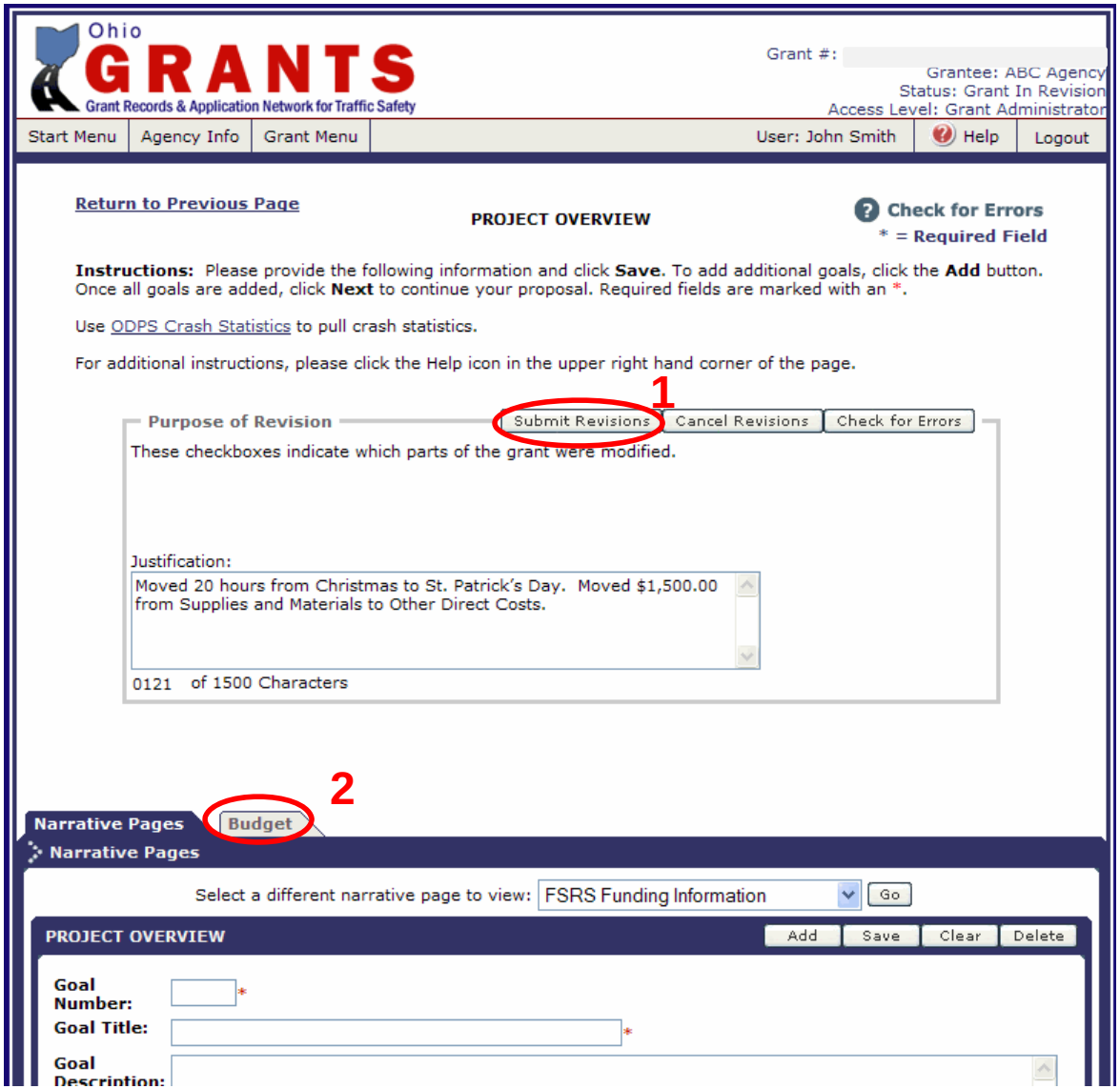
After you click “Add”, a blank form will come up. Complete and click “Save” just like on the proposal.

Note: There will not be a bottom box for new pages, there was no previous page to compare it to.



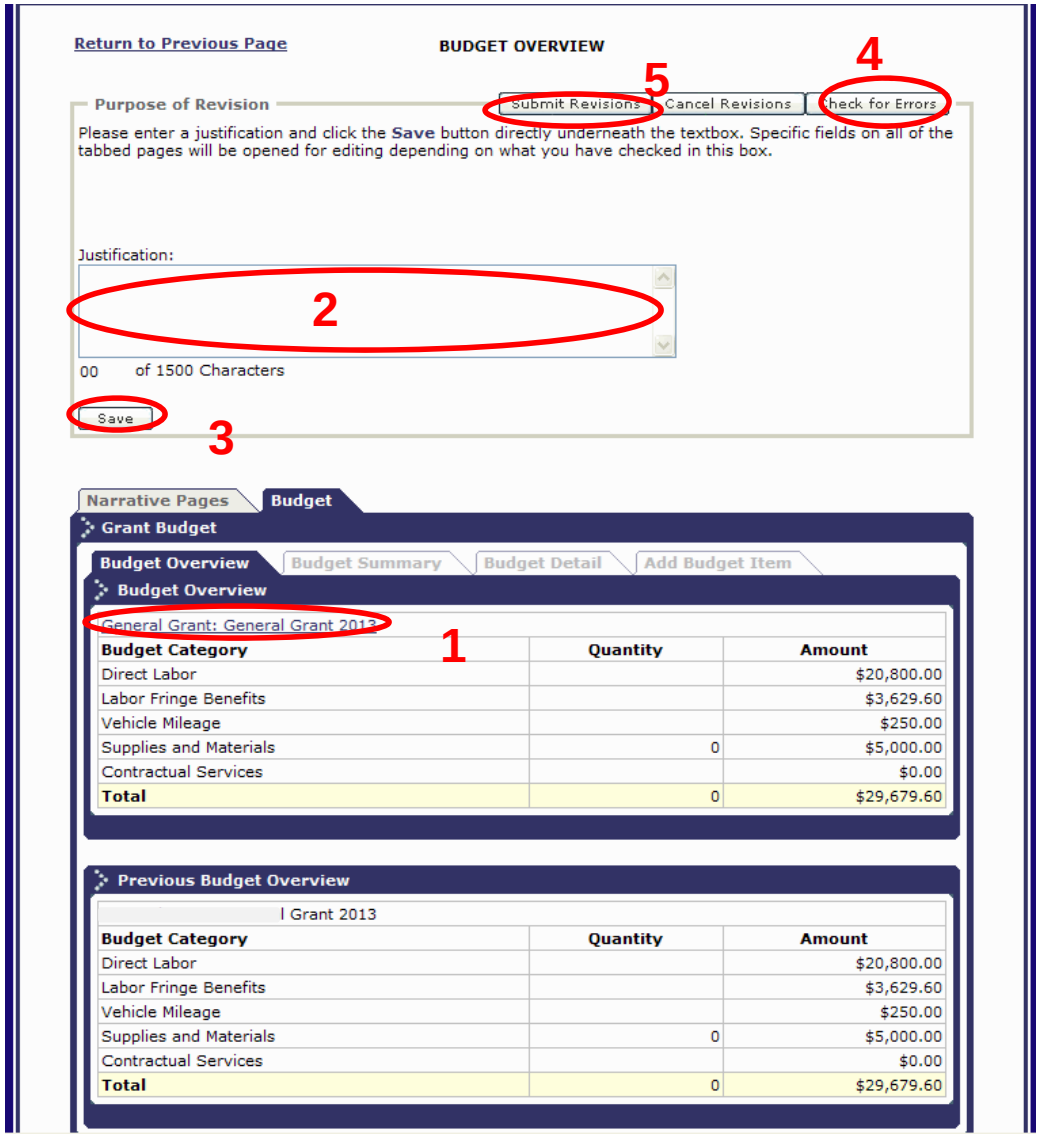
Narrative Page Revisions

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”.

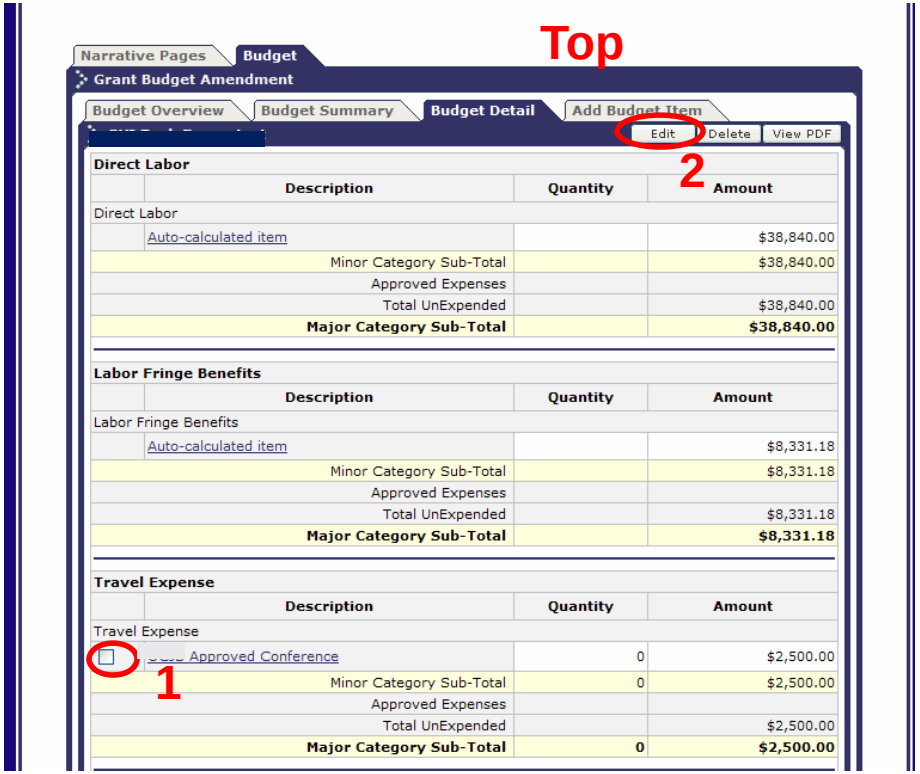


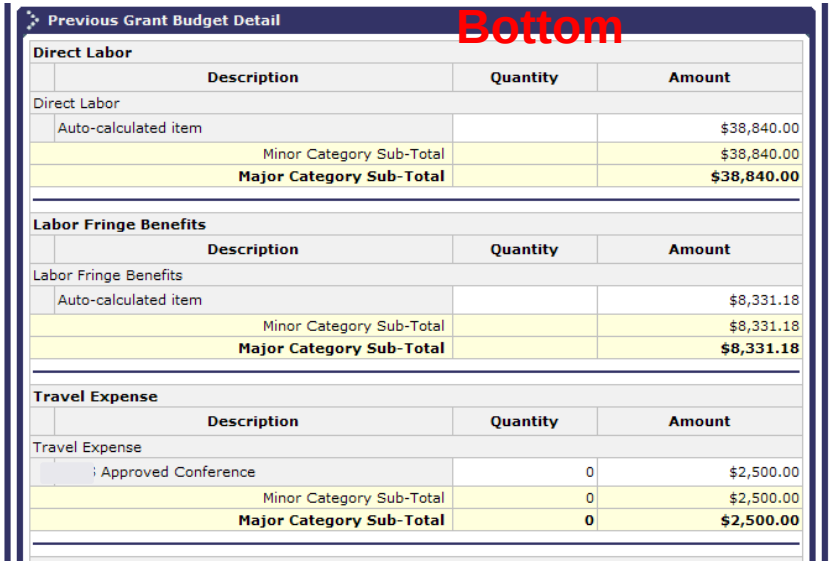
Budget Revisions

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:

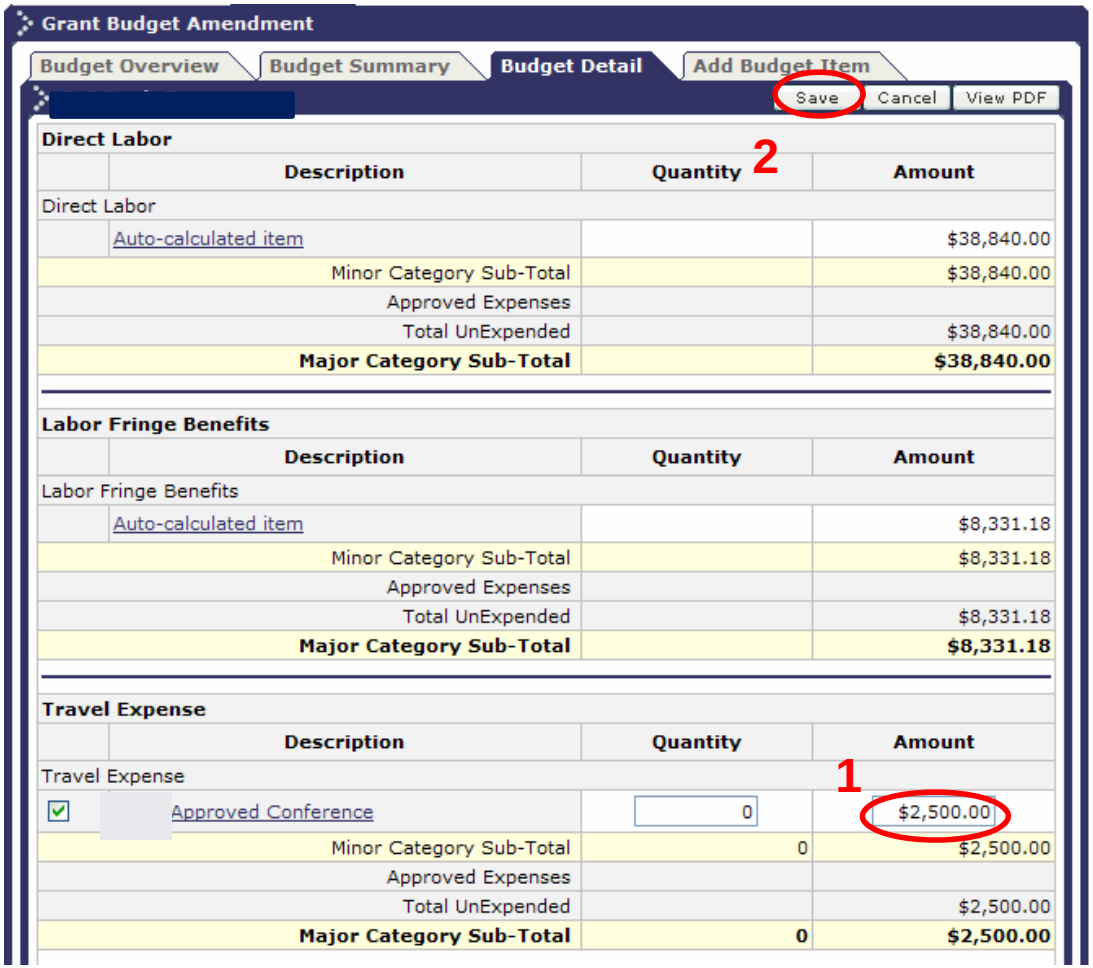
1. Check the box next to the line item.
2. Click “Edit”.





Budget Revisions

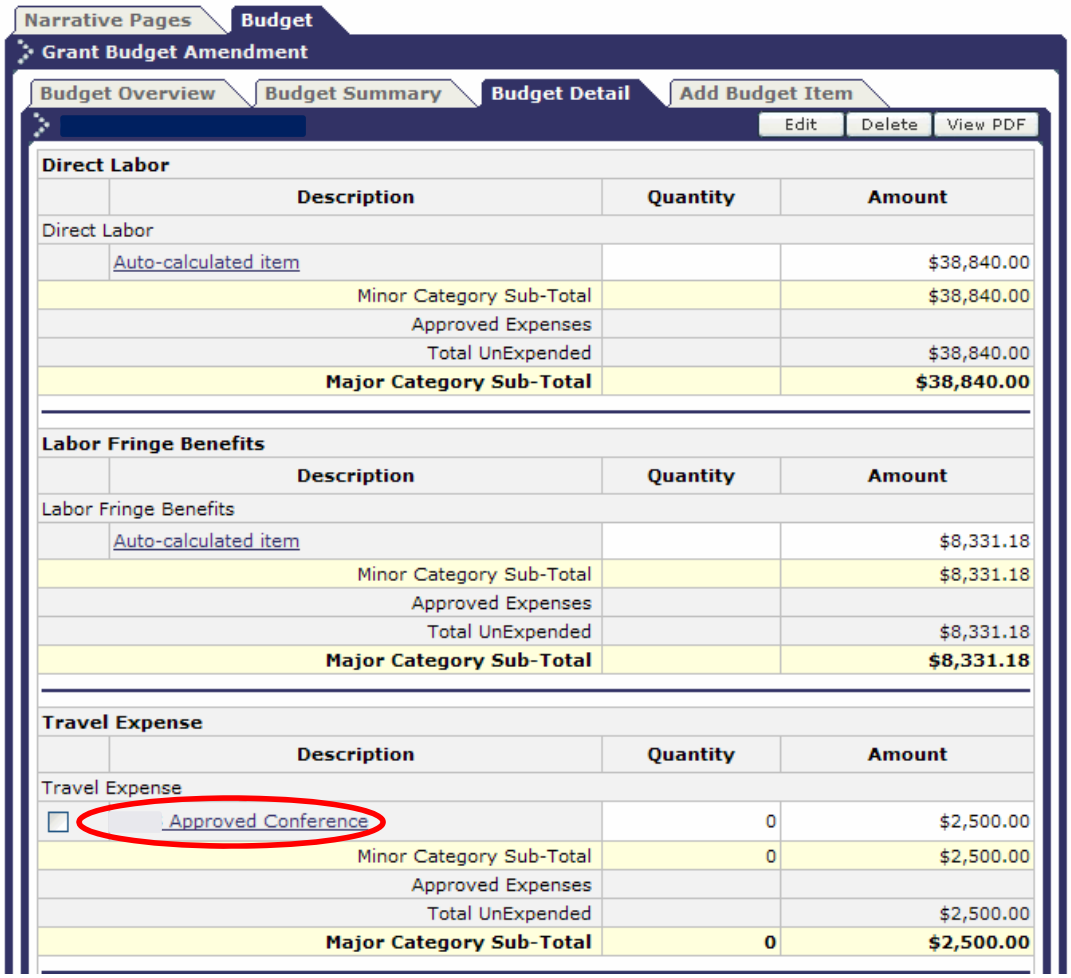
1. Change the amount.
2. Click “Save”.



Budget Revisions

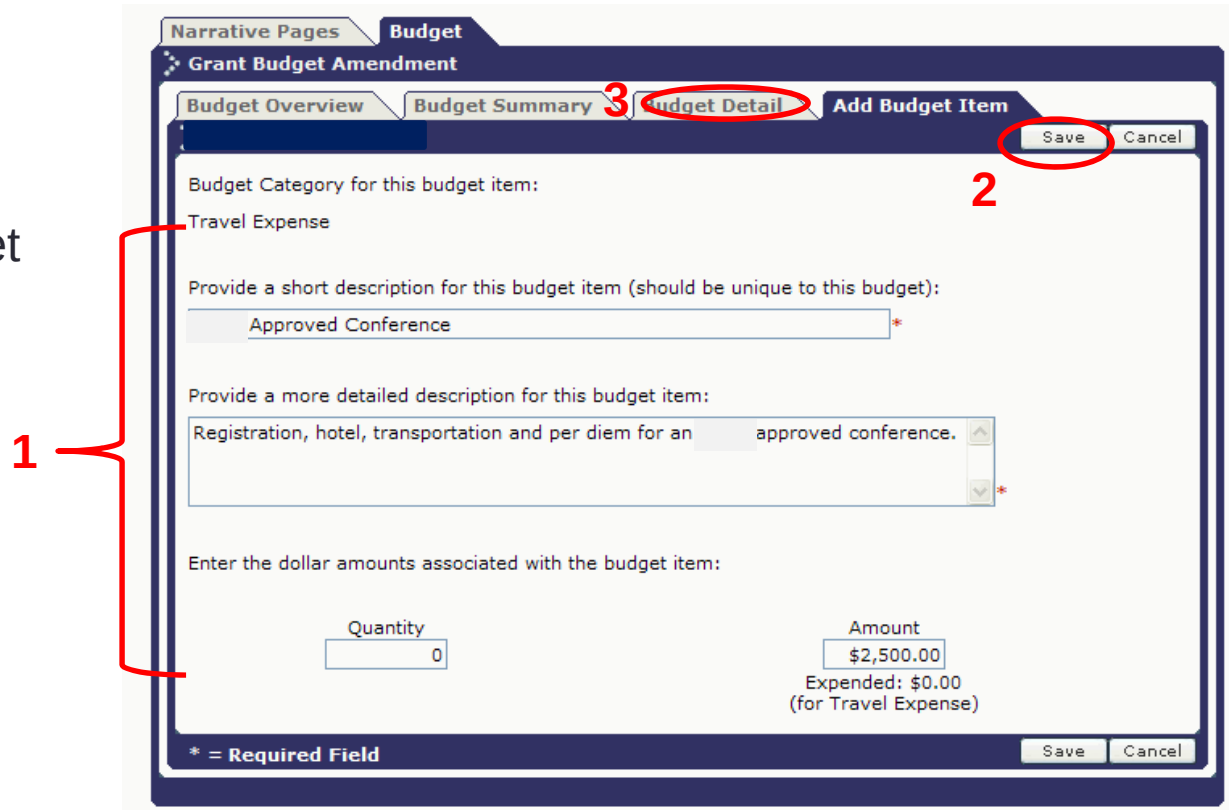
To revise the budget amount and the description:

Click the link for the line item.



Budget Revisions

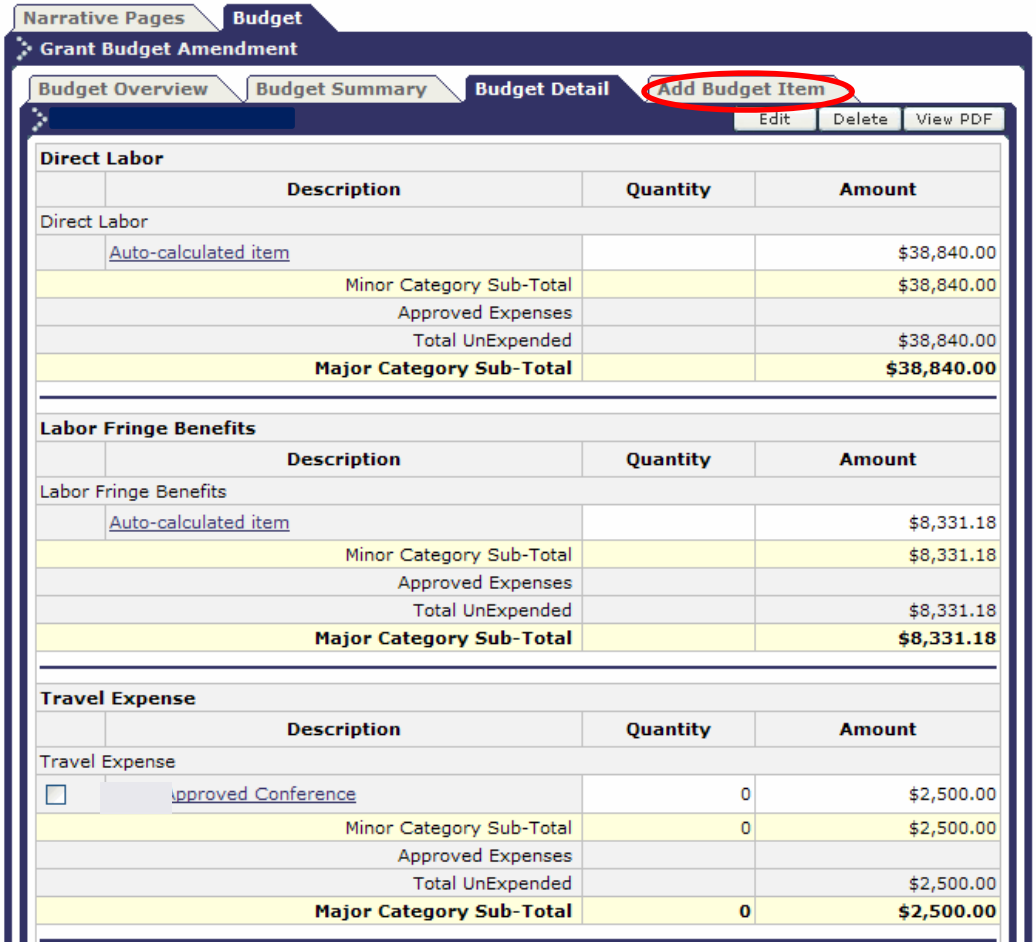
1. Make the changes in the description and/or the amount.
2. Click “Save”.
3. After saving, click “Budget Detail” to return to the budget.



Budget Revisions

To add a new item in the budget:

Click “Add Budget Item”.

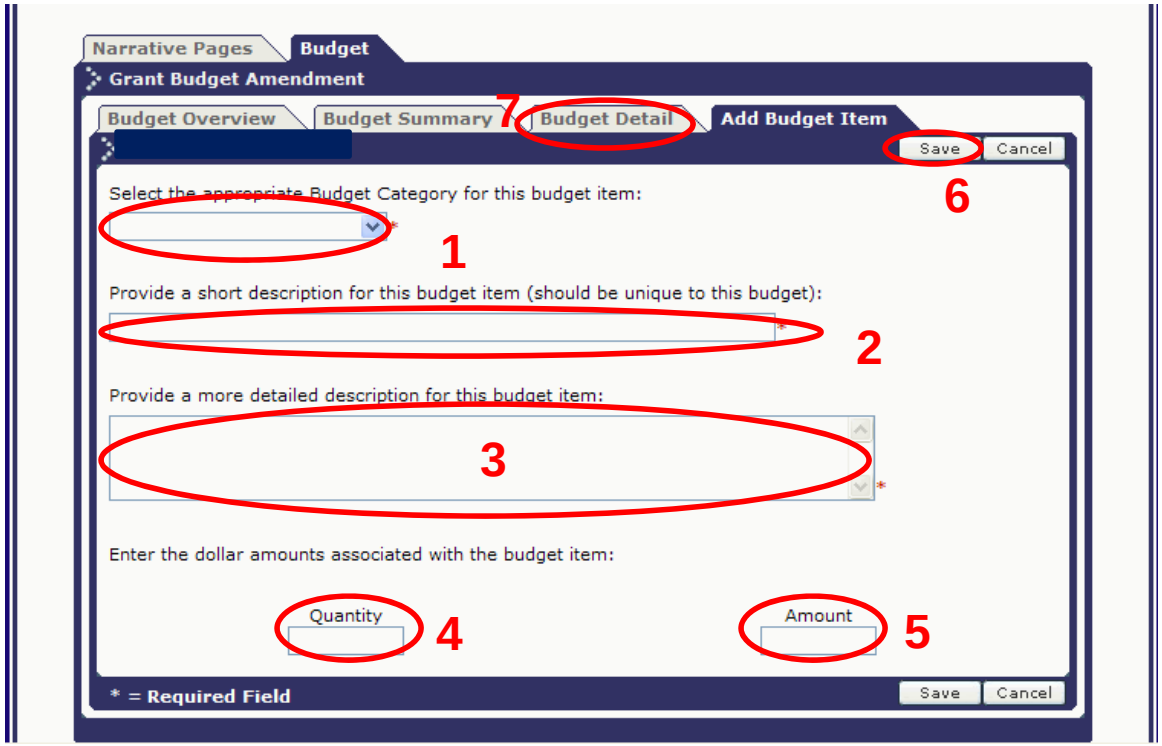


Budget Revisions

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”.

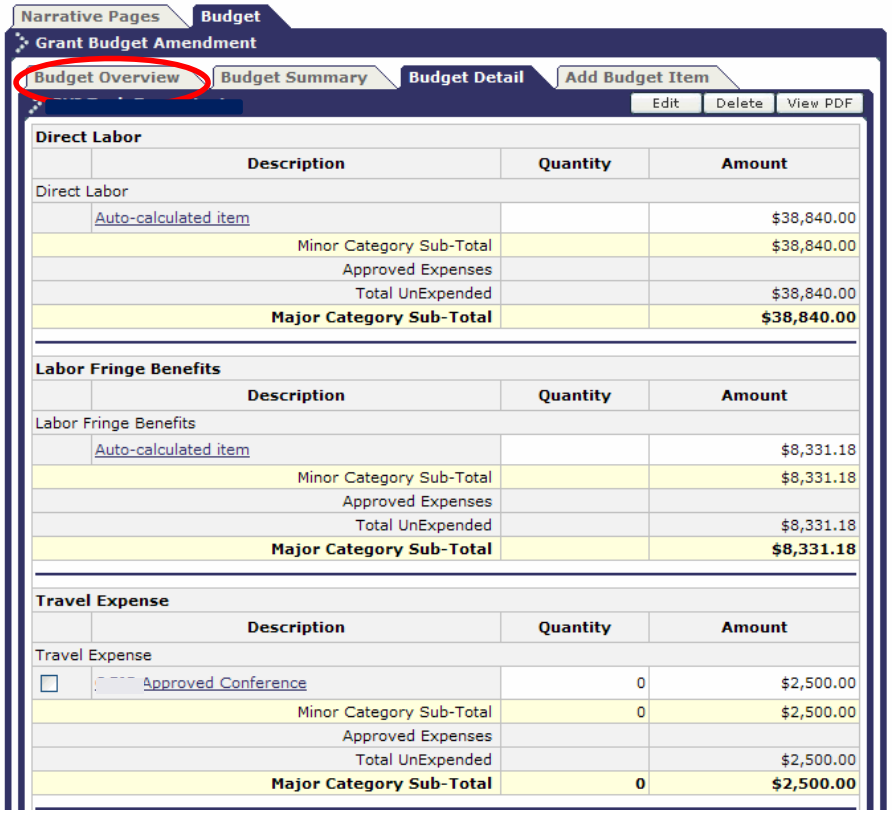
Continue adding additional items, until all new items have been added.

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



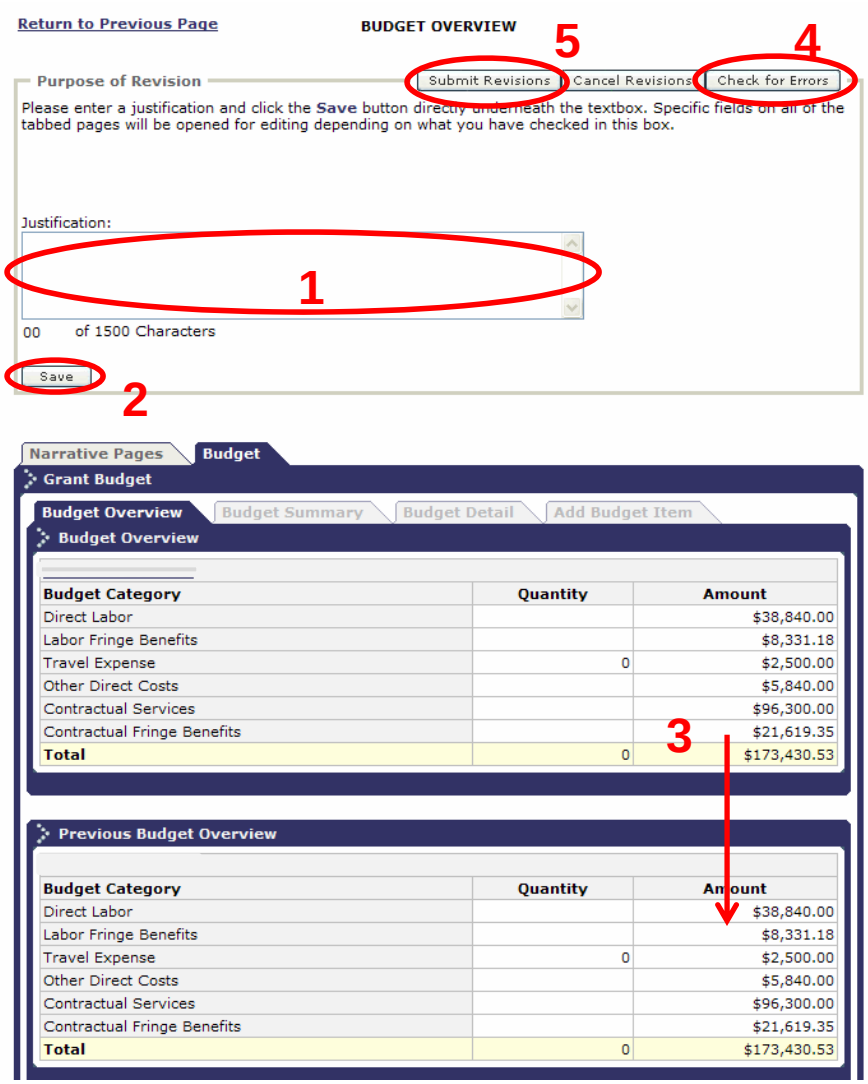
Budget Revisions

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".

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 revision 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.

Grant Revision Modifications Required

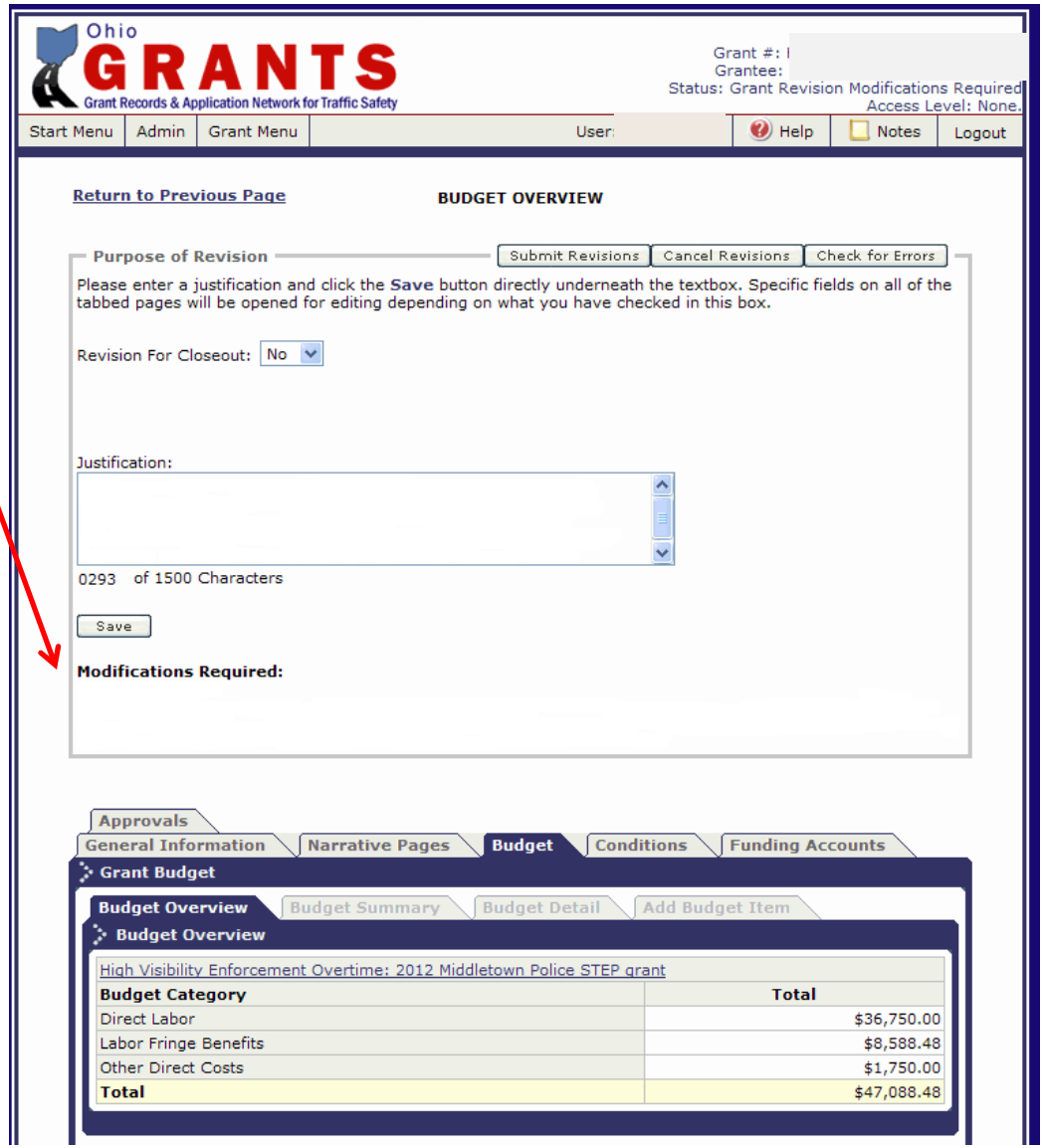
From the Grant Menu, click on "View Revisions".

Grant Revision Modifications Required

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

Follow the steps on slides 111 – 125 to make the required changes and re-submit the revision.

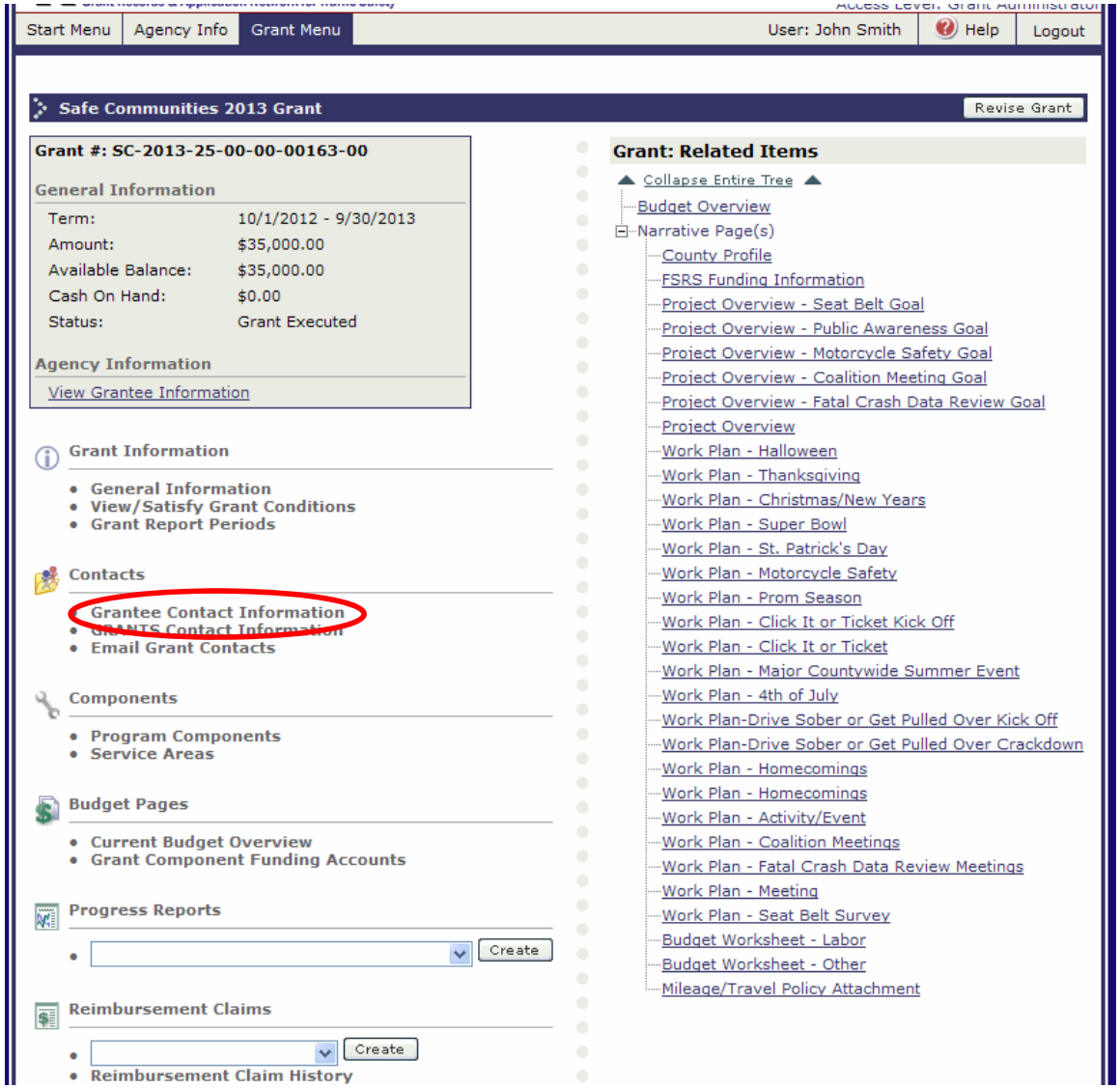
Check the box next to Revision Process on the Pre-Activity form.



Controlling Access to Grant

To change/add personnel to the grant:

Click “Grantee Contact Information”.

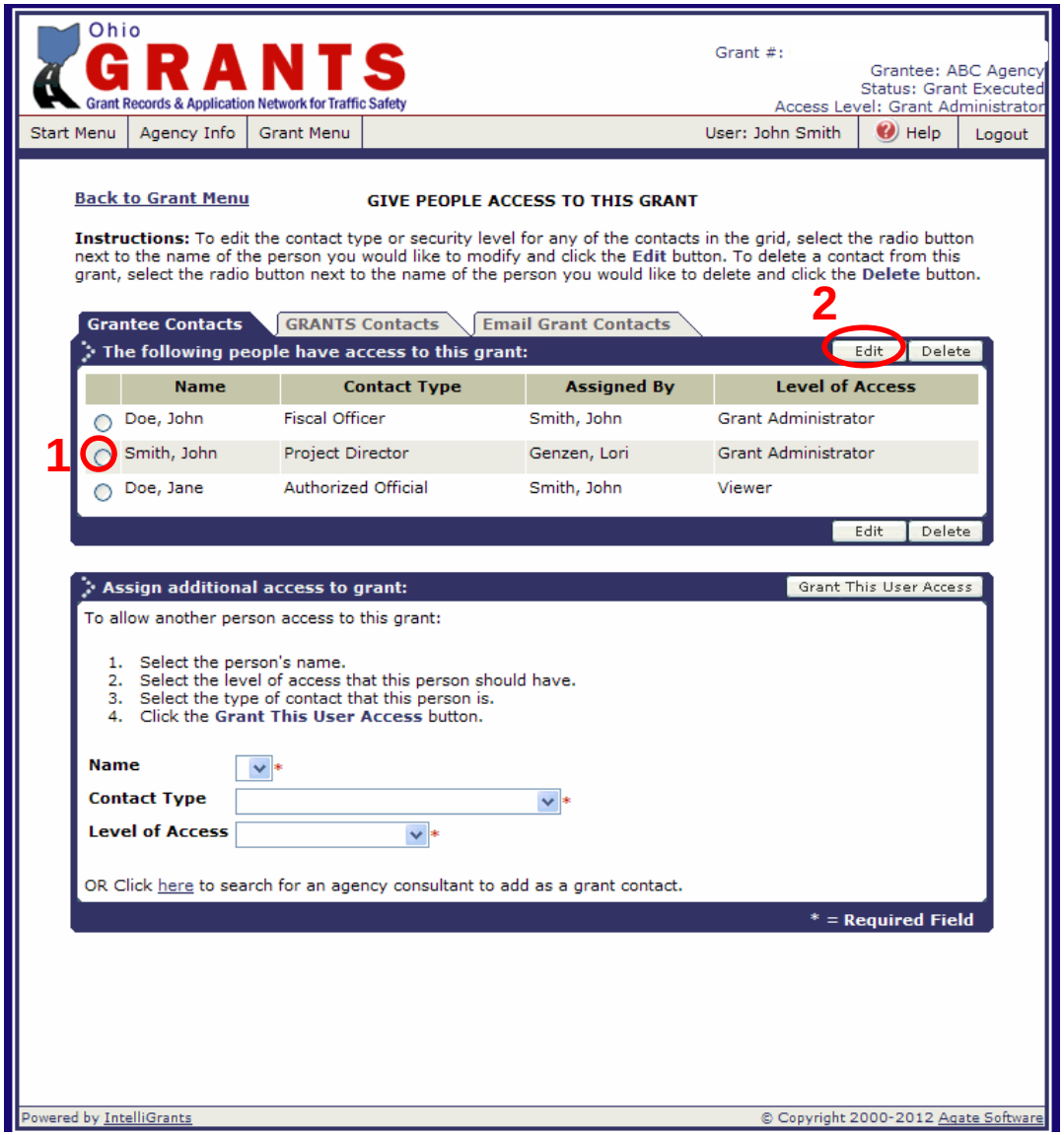


Controlling Access to Grant

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 137 if you need to de-activate their account.

Controlling Access to Grant

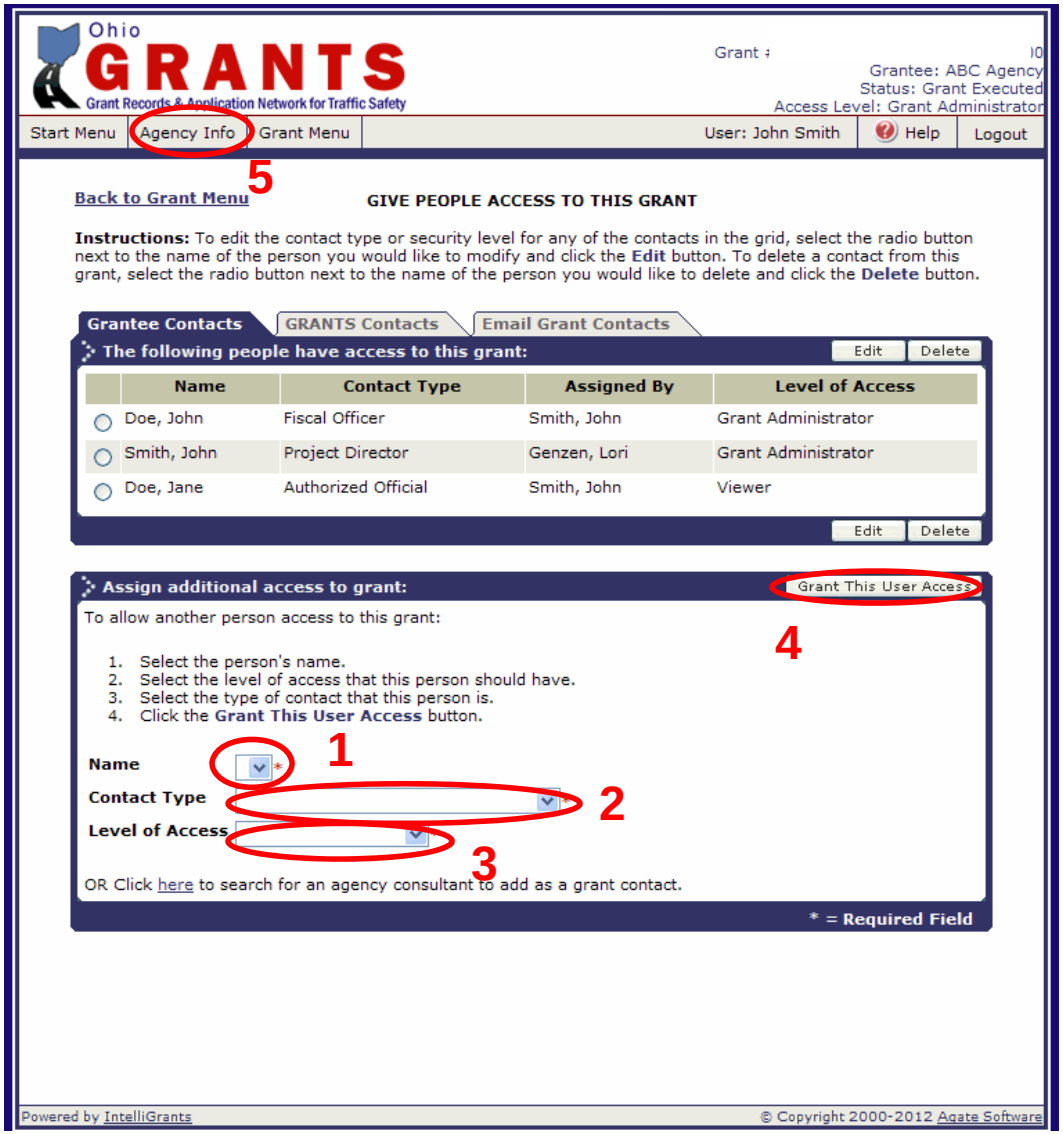
To add additional people:

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:

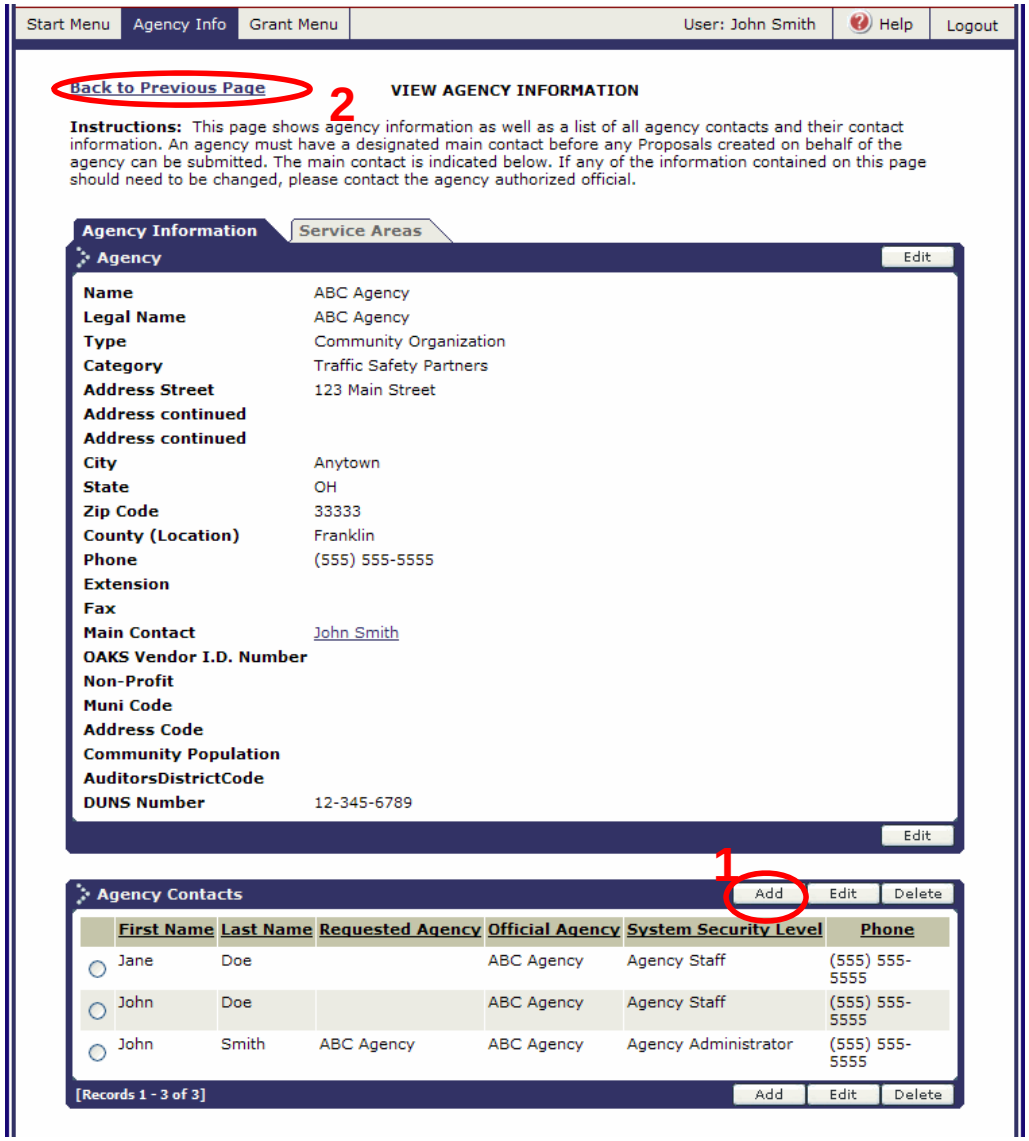
5. Click "Agency Info".



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”.



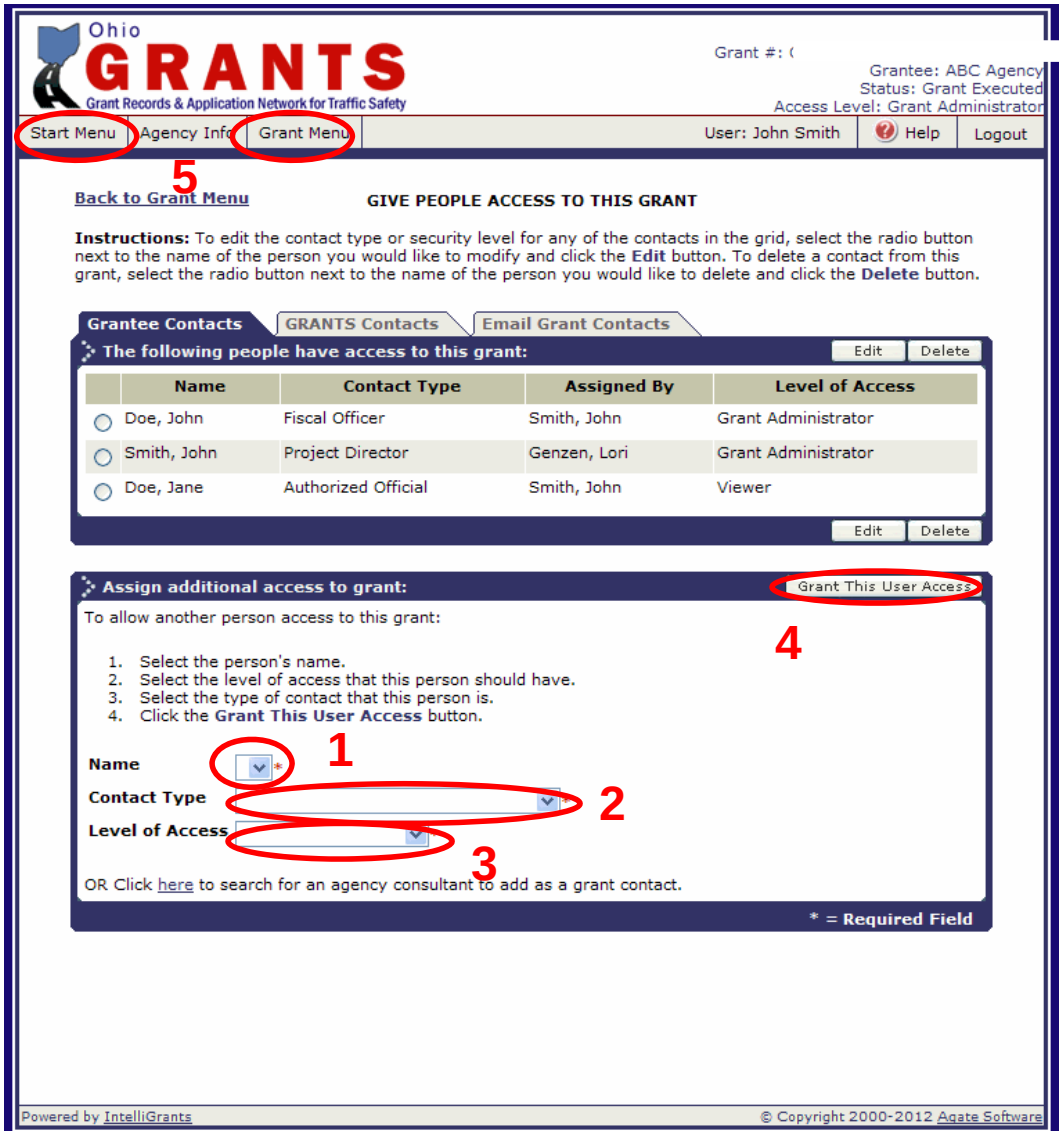
Controlling Access to Grant

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.

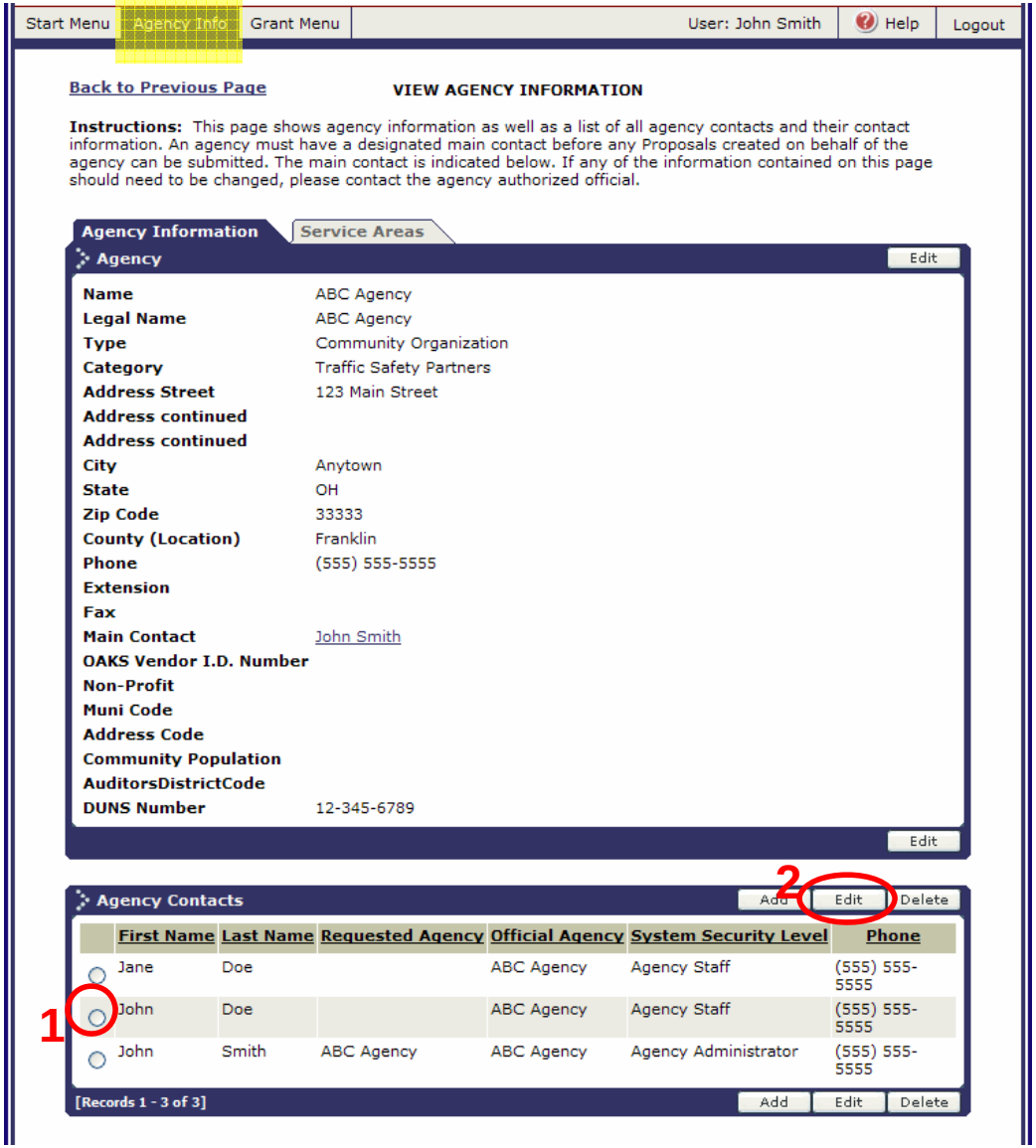
5. Click "Grant Menu" to return to your grant or "Start Menu" to return to your task list.



Controlling Access to GRANTS

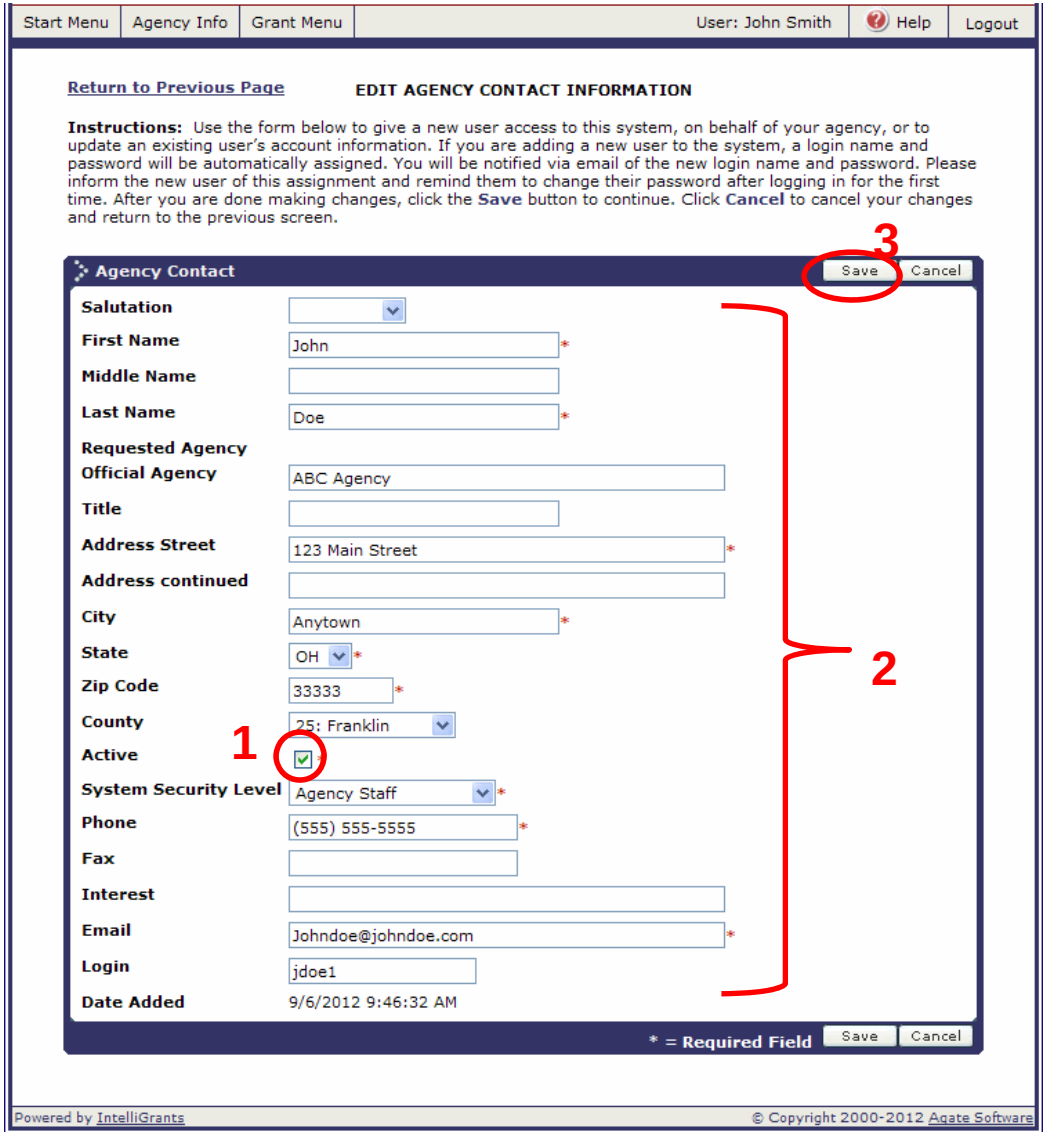
To manage user's access click on "Agency Info".

1. To edit existing users, click the radio button next to the user's name.
2. Click "Edit".



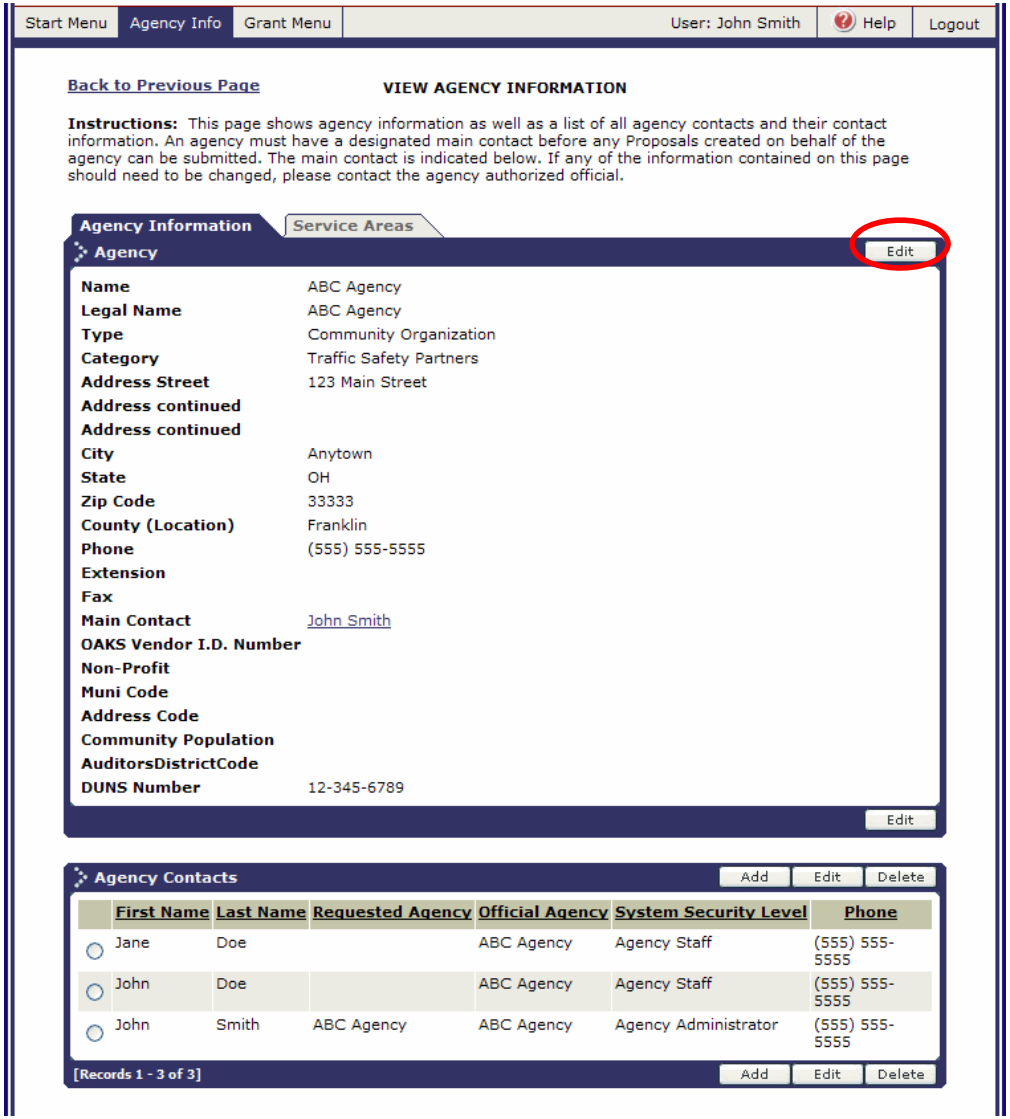
Controlling Access to GRANTS

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”.



Agency Information

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

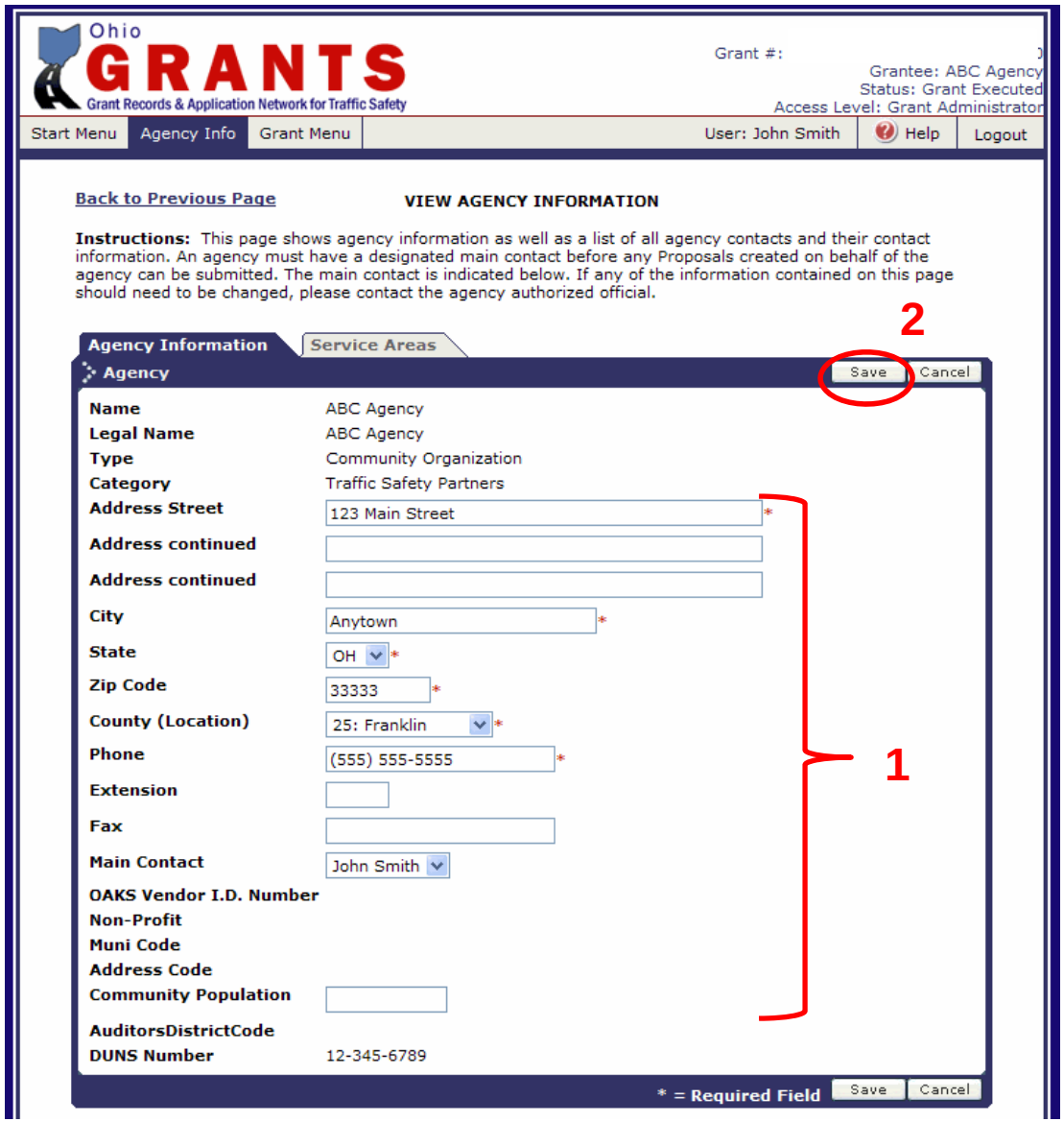


Agency Information

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.