

OHIO FAMILY & CHILDREN FIRST



USER GUIDE FOR ALLOCATIONS

GETTING STARTED WITH OHIO MENTAL HEALTH & ADDICTION SERVICES GRANTS & FUNDING MANAGEMENT SYSTEM (GFMS)



USER GUIDE

TABLE OF CONTENTS

<u>Overview</u>	3
<u>Who is this document for?</u>	3
<u>Who should I contact?</u>	3
<u>User Registration</u>	3
<u>Get Started as a New External User (First Time Accessing OhioMHAS Application)</u>	3
Step 1: <u>Navigate to GFMS link</u>	3
Step 2: <u>“Welcome Screen”- Link to Register</u>	3
Step 3: <u>“External User Registration”- Find New Organization</u>	4
Step 4: <u>“Successfully Registered” Screen</u>	5
Step 5: <u>Navigate to Create a Password</u>	6
Step 6: <u>Create Your Password</u>	6
<u>Existing External User (Having Access to OhioMHAS Application)</u>	7
Step 1: <u>Navigate to GFMS link</u>	7
Step 2: <u>“Welcome Screen”- Link to Login</u>	7
Step 3: <u>IPortal Login Screen:</u>	8
<u>External User- Forgot Password</u>	8
Step 1: <u>Forgot Password Link</u>	8
Step 2: <u>Retrieve Password Screen:</u>	9
Step 3: <u>Reset Password Link</u>	10
Step 4: <u>Change Password</u>	10
Step 5: <u>Login With Your Updated Password:</u>	11
<u>Login to GFMS Application</u>	12
Step 1: <u>Navigate to MHAS Portal and Login Successfully</u>	12
Step 2: <u>Display MHAS IPortal Dashboard-Navigate to GFMS</u>	12
Step 3: <u>Display GFMS Dashboard</u>	13
Step 4: <u>Applicant Dashboard View and Navigation</u>	13
<u>Create a New Allocation Application</u>	17
Step 1: <u>Login to GFMS (Getting Started)</u>	17
Step 2: <u>Allocation Face Sheet</u>	18
Step 3: <u>Allocation Organization Information</u>	20
Step 4: <u>Allocation Allocated Funding</u>	20
Step 5: <u>Allocation Federal Requirements</u>	21
Step 6: <u>Allocation Documentation</u>	23
Step 7: <u>How to Upload Documents</u>	24
Step 8: <u>Allocation Assurance</u>	26
Step 9: <u>Allocation Signature</u>	27
Step 10: <u>Submit Allocation Applicationt</u>	29

Overview

The Grants and Funding Management System (GFMS) will be utilized by the Ohio Department of Mental Health and Addiction Services (OhioMHAS), ADAMHS/ADAS/CMHS Boards and all Prevention, Treatment and Recovery Support Providers, and Family and Children First Councils (FCFCs) for all OhioMHAS funds (federal and state) to support proposal submission, management, and all required (federal and state) data collection. The system provides a means for an organization to apply for funding, report progress on identified outcomes, report expenditures, and to draw-down funds to request reimbursement for the services. This guide describes how FCFCs and their Administrative Agents (AA) will utilize the Grant and Funding Management System to apply for their yearly allocations.

Who is this document for?

This document is intended for an applicant seeking funds from Ohio Family and Children First (OFCF). It provides the entire view and functionality of Grant and Funding Management System (GFMS), as it pertains to the Allocation Application process. The Allocation Application is required to access funding from OFCF and OhioMHAS.

Who should I contact?

For issues with user names or passwords contact the OhioMHAS HelpDesk via email at MHAHelpdesk@mha.ohio.gov or call 614-466-1483. *All other questions should be directed to Tammy Payton* via email at Tammy.payton@mha.ohio.gov or call 614-752-4044.

User Registration

Get Started as a New External User (First Time Accessing OhioMHAS Application)

This section will be applicable to the “**New**” External users only. External User Registration process consists of following steps:

Step 1: Navigate to GFMS link

Open your browser and **Go** to <https://apps.mha.ohio.gov/GFMSWelcome/Welcome.html> >>Welcome Page will be displayed. *There may be some compatibility issues with Internet Explorer, so we suggest using Google Chrome or Firefox to access this application.*

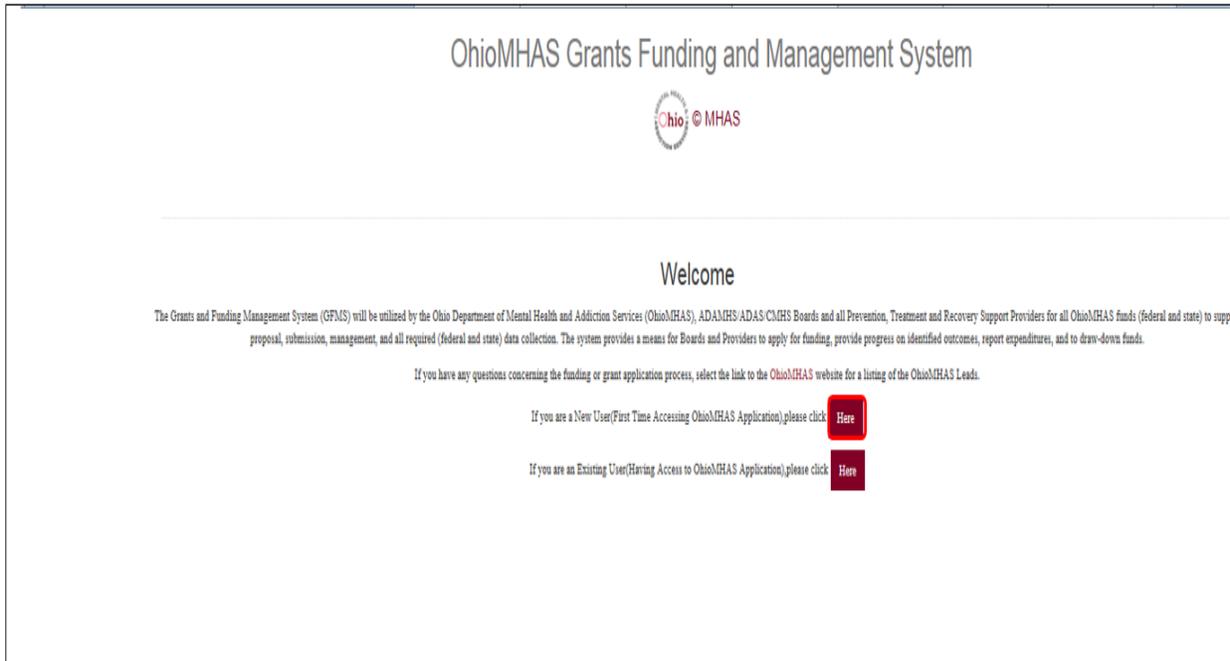
Step 2: “Welcome Screen”- Link to Register

This is the landing page where an external user navigates from www.mha.ohio.gov under the funding opportunities to page.

When the user navigates to the “**Welcome**” screen, they will be provided two options Register (New User “Has never logged into an OhioMHAS Applications before”) or Login (Existing User “Has logged into previous OhioMHAS Applications before” –OLGA and POPS) for GFMS.

***Note:** All existing user accounts that were established in the previous OhioMHAS funding systems (POPS or OLGA) have been uploaded to GFMS and returning users will **Login as an Existing User**.

1. For Registration, **Click** on **Here** button for a **“New User”**, displayed on the **“Welcome”** Screen as highlighted below in the snapshot:



PLEASE NOTE: The person registering as the “New User” should be the Family and Children First (FCFC) Administrative Agent (AA) OR a representative authorized to act on behalf of the AA. The user will be responsible for reviewing and agreeing to OhioMHAS Assurances and will be responsible for the management of the funds. We encourage you to work in cooperation with your FCFC Council Coordinator/Director to submit this application.

Step 3: “External User Registration”- Find New Organization

Select and enter the information as indicated per each field as displayed on the “External User Registration” screen.

Fields with red asterisks * are required fields.

1. **Find** your organization under the **“Organization Name”** dropdown

2. **Select** your organization
3. **Click** on the **Submit** button as highlighted below in the snapshot. At this point, the Create Organization button is grayed out.

***Note:** Organization Name should be preloaded into the grant system and will be your county name + FCFC (i.e., Allen County FCFC, Adams County FCFC, etc.).

External User Registration » Mental Health and Addiction Services Portal

Salutation:

Title:

First Name: *

Last Name: *

Middle Name:

Email: *

Phone (Office): *

Phone (Office) Ext:

Phone (Mobile):

Organization Name:

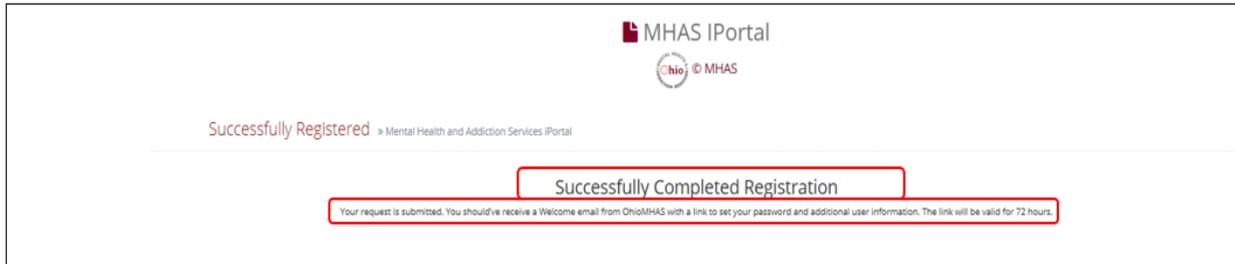
If your Organization is not in the list please check the box and Add your Organization
Please select an Organization.



PLEASE NOTE: The organization information should be listed. If you do not find your county FCFC listed under the Organizational Name drop down list, then please contact Tammy Payton at tammy.payton@mha.ohio.gov or call 614-752-4044.

Step 4: “Successfully Registered” Screen

Clicking on the Submit button displayed on “External User Registration” screen, navigates you to “Successfully Registered” screen where you can view a message “Successfully Completed Registration” and informs you that you will be receiving a Welcome email from OhioMHAS, providing a link to create your password as highlighted below in the snapshot:

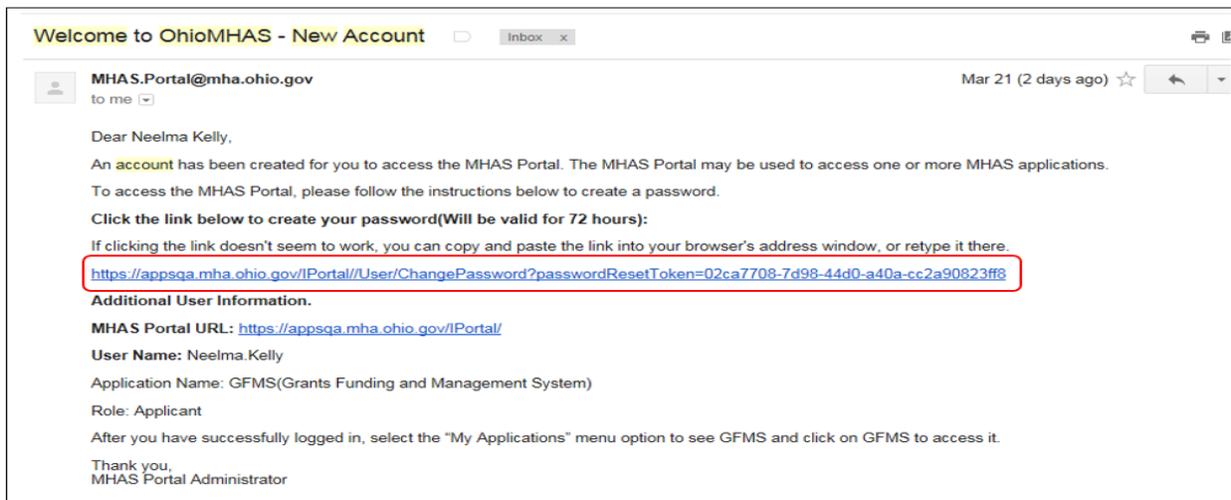


Step 5: Welcome to OhioMHAS New Account Email Notification- Navigate to Create a Password

External User will receive a welcome email notification from IPortal Administrator that the account has been created to access IPortal. A link will be provided in the email to create a password.

Step 6: Create Your Password

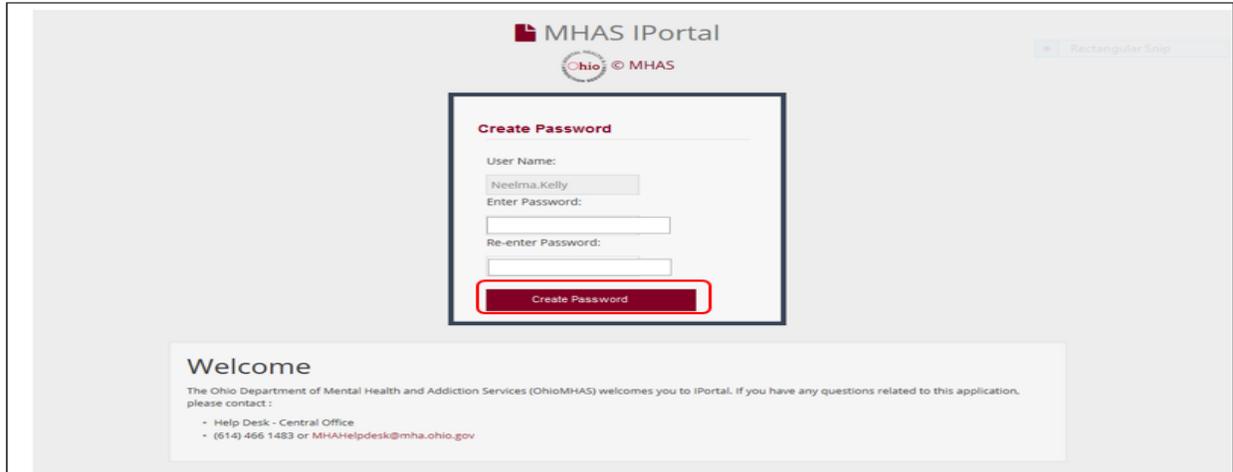
1. To Create a Password, **Click** on the link highlighted below in the snapshot:



2. **Enter** your password on the basis of following defined Standard Password Requirements:

- Password must be 8-20 characters long.
- Password must contain at least one character from each of the following categories:
 - English letter (Aa-Zz)
 - Digits (0-9)
 - Special symbols (!#\$%&_).

3. **Click** on **Create Password** button as highlighted below in the snapshot:



4. An information message “Your password is successfully created” will be displayed and provide the user an option to login to the application
5. Enter your login credentials and **click** on **Login** button to move forward in the application. You may now proceed to the section titled “Create a New Allocation Application” on page 17 of this User Guide.

Existing External User (Having Access to OhioMHAS Application)

This section will be applicable to the “**Existing**” External users only.

Step 1: Navigate to GFMS link

Open your browser and **Go** to <https://apps.mha.ohio.gov/GFMSWelcome/Welcome.html> >> the Welcome Page will be displayed.

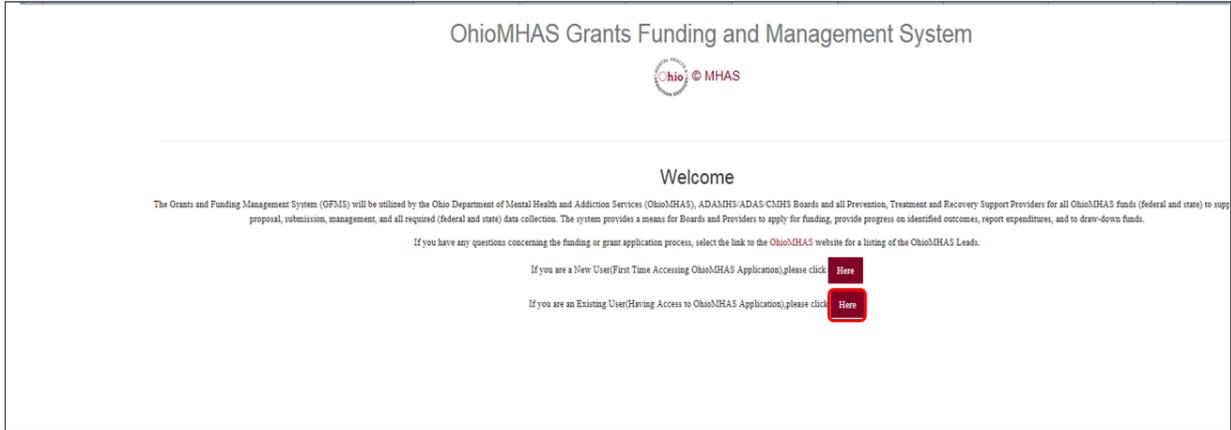
Step 2: “Welcome Screen”- Link to Login

This is the landing page where an external user navigates from www.mha.ohio.gov under the funding opportunities to page.

When the user navigates to the “**Welcome**” screen, they will be provided two options Register (New User “Has never logged into an OhioMHAS Applications before”) or Login (Existing User “Has logged into previous OhioMHAS Applications before” –OLGA and POPS) for GFMS

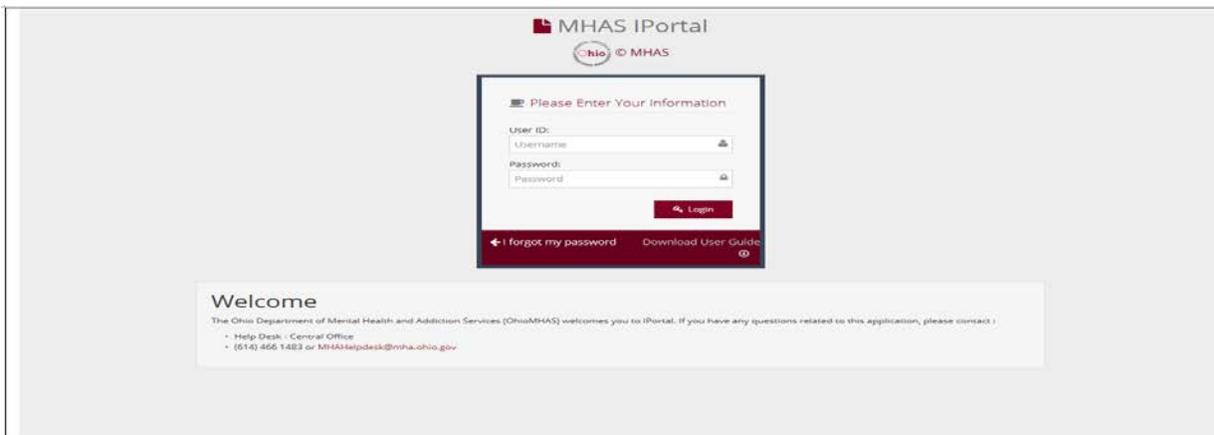
1. For Login, **Click** on **Here** button for a “**Existing User**” (Has logged into previous OhioMHAS Applications before-OLGA and POPS), displayed on the “Welcome” Screen as highlighted below in the snapshot:

***Note:** All user accounts have been brought over from other applications. No need to register for the application.



Step 3: IPortal Login Screen:

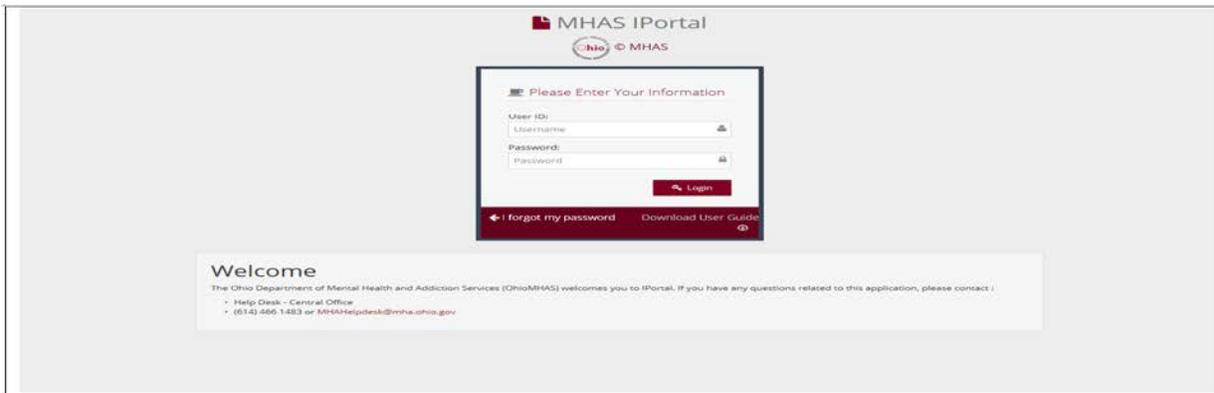
1. Enter your login credentials and **click** on **Login** button
2. The user will be navigating to the I-Portal Dashboard. You may now proceed to the section titled “**Create a New Allocation Application**” on page 17 of this User Guide.



External User- Forgot Password

Step 1: Forgot Password Link

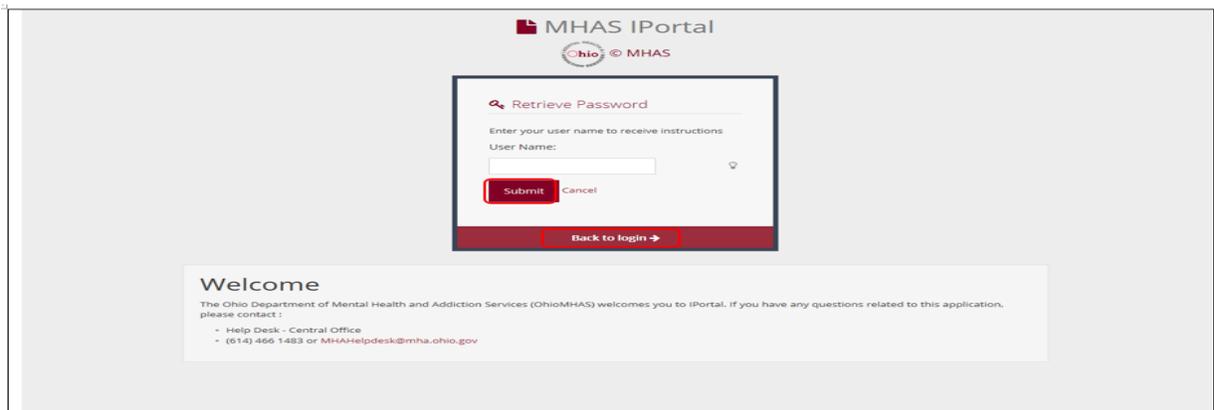
From IPortal Login Screen- **Click** on the **Forgot Password** Link as *displayed on the following snapshot:*



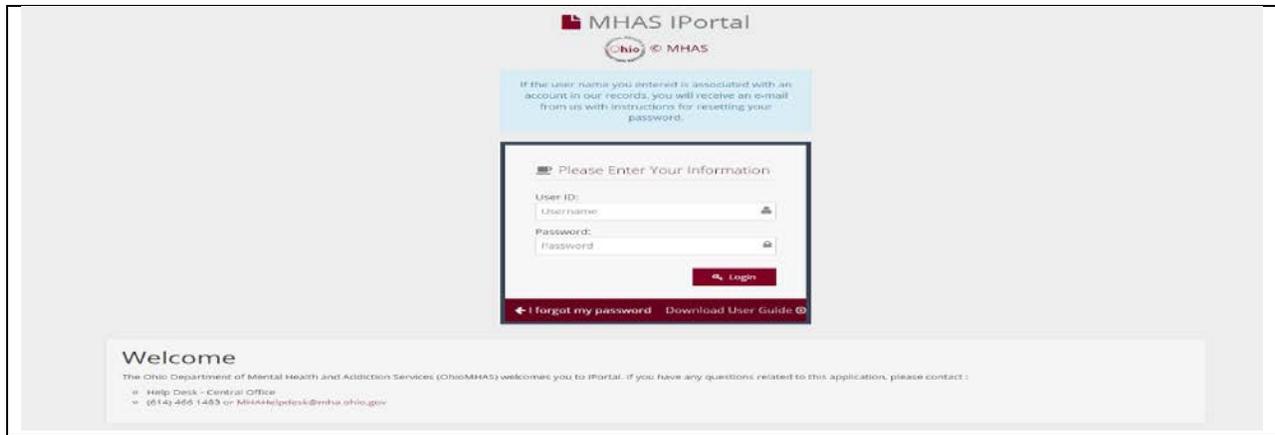
Step 2: Retrieve Password Screen

1. **Enter** your user name and **click** on **Submit** button as highlighted below in the snapshot below

***Note:** If you change your mind and want to go back to I-Portal Login screen, click on “Back to Login” link displayed on “Retrieve Password” screen.

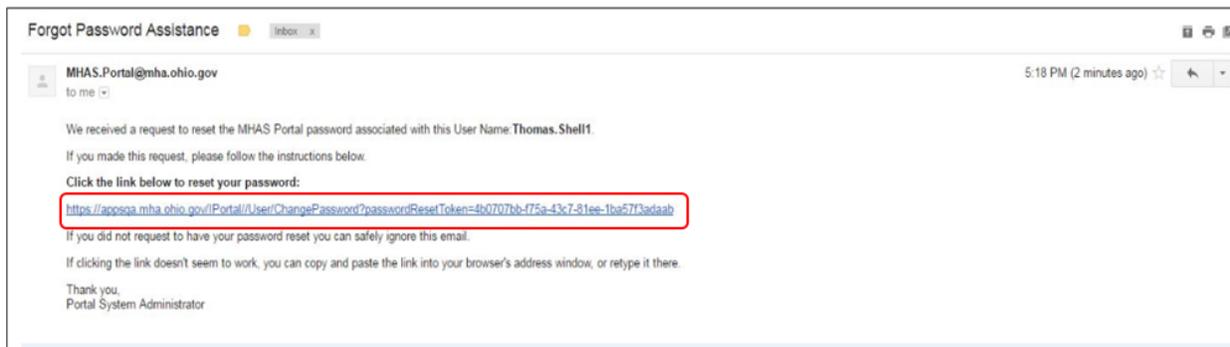


2. An information message “If the user name you entered is associated with an account in our records, you will receive an email from us with instructions to resetting your password” will be displayed on the IPortal Login Screen as highlighted below in the snapshot:



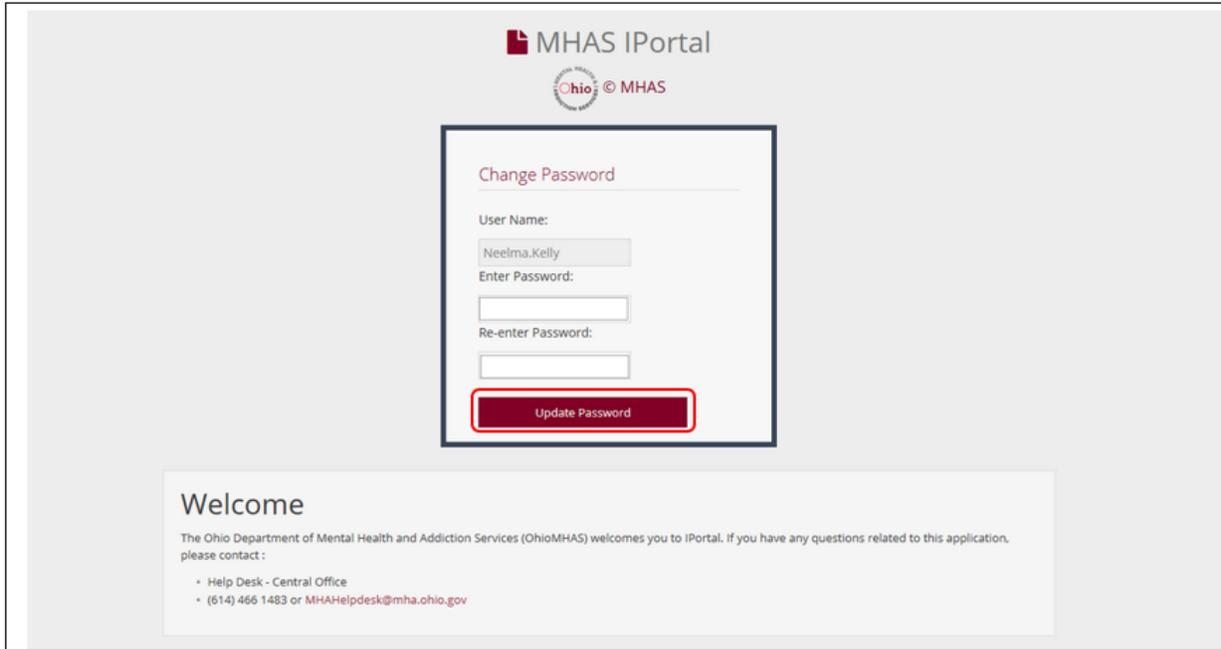
Step 3: Link to Reset Password

1. You will be receiving a “Forgot Password Email Notification” from IPortal Administrator, providing a link to reset a password.
2. **Click** on the link to reset your password as highlighted below in the snapshot:



Step 4: Change Password

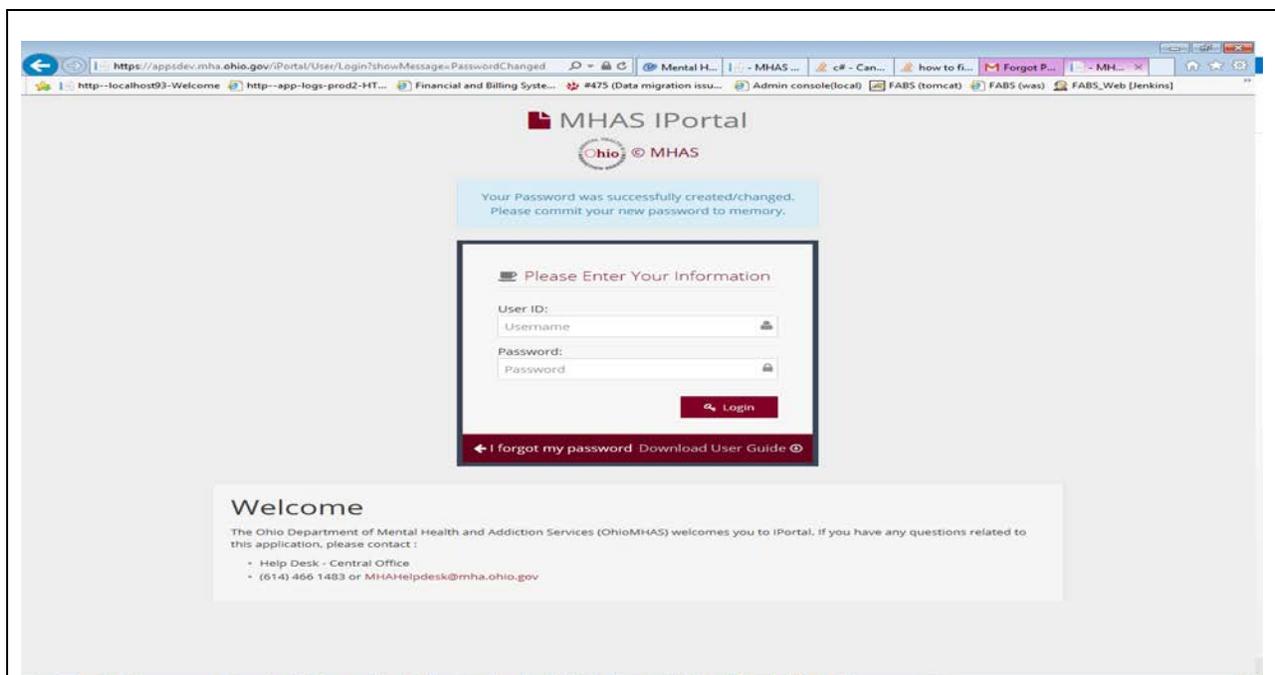
1. **Change** your password on the basis of following defined Standard Password Requirements:
 - Password must be 8-20 characters long.
 - Password must contain at least one character from each of the following categories:
 - English letter (Aa-Zz)
 - Digits (0-9)
 - Special symbols (!#\$%_).
2. **Click** on **Update Password** button.



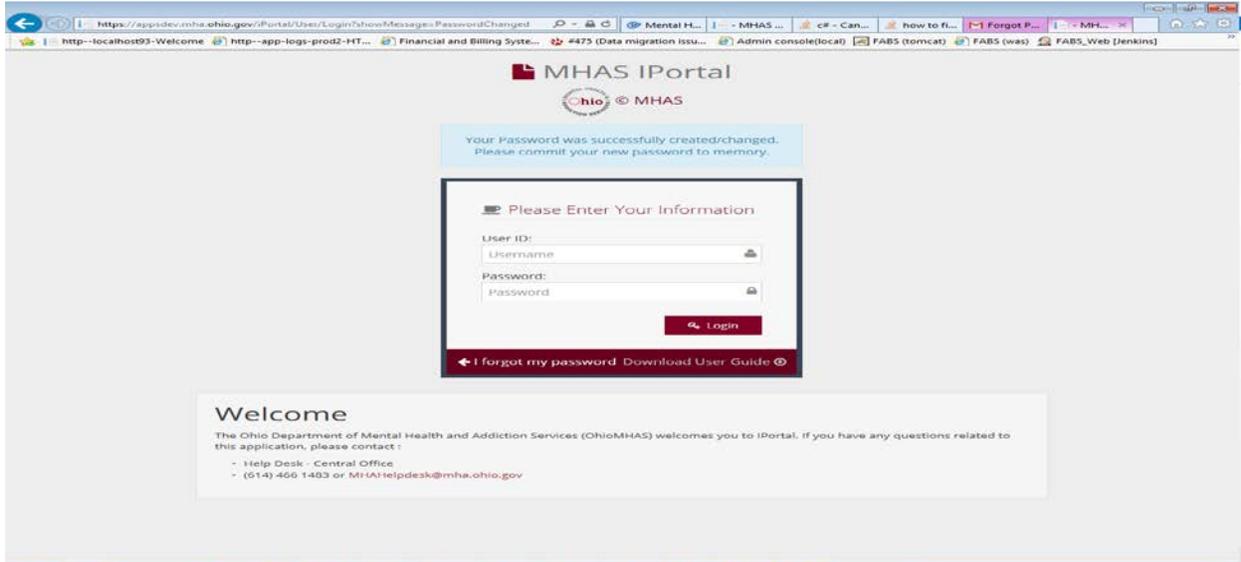
3. An information message “Your password is successfully updated” will be displayed and providing the user an option to login.

Step 5: Login with Your Updated Password

Enter your login credentials and **click** on **Login** button to move forward in the IPortal.



Login to GFMS Application

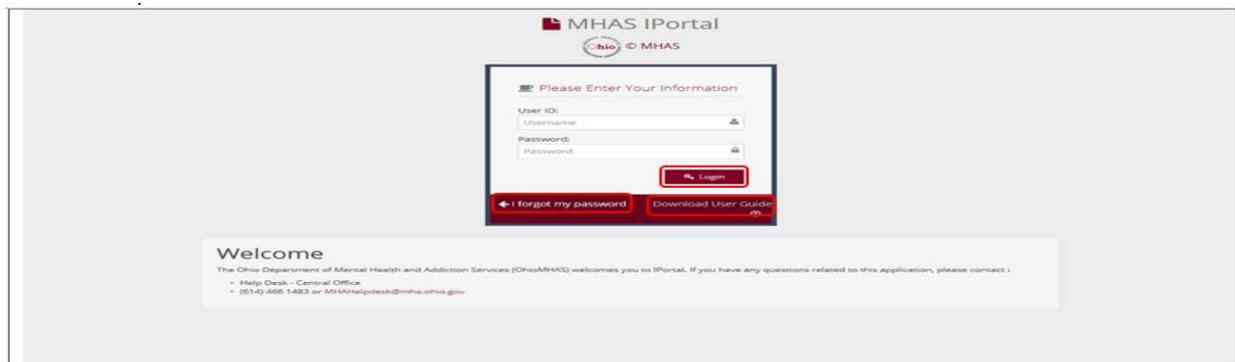


Step 1: Navigate to MHAS Portal and Login Successfully

External User Navigation Path to MHAS Portal Login Screen

<https://apps.mha.ohio.gov/GFMSWelcome/Welcome.html>

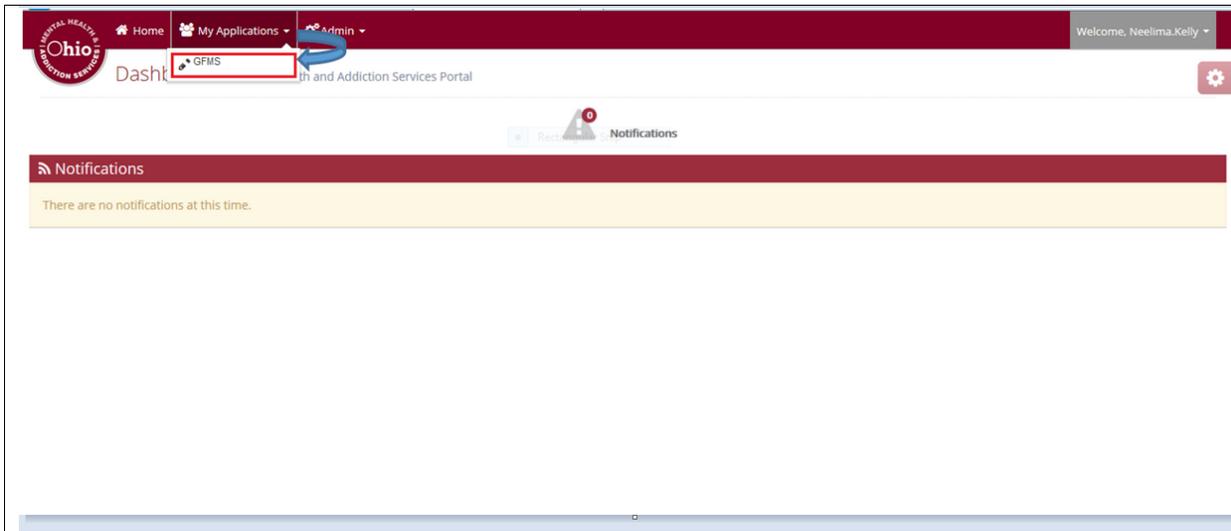
1. **Open** to your browser and go to your navigation path. You will be navigated to the “MHAS Portal” Login Screen
2. **Enter** your User ID and Password and **click** on **Login** button. You will be navigated to an IPortal Dashboard.



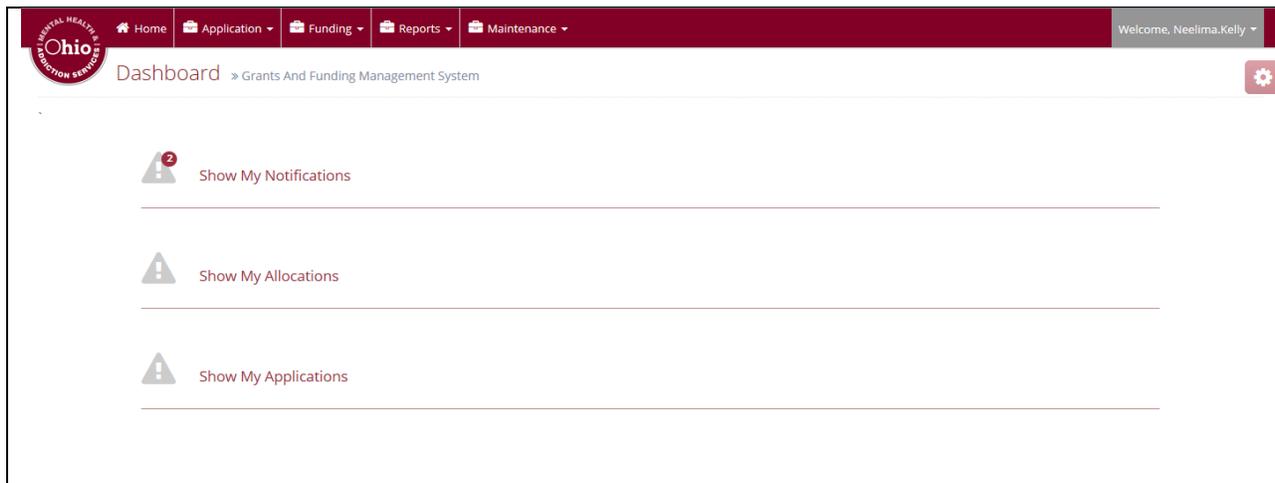
Step 2: Display MHAS IPortal Dashboard-Navigate to GFMS

After logging in, the user is navigated to the MHAS IPortal Dashboard.

1. **Click** on **My Applications** tab displayed on I-Portal Dashboard
2. **Select “GFMS”** as displayed in the snapshot below:



Step 3: Display GFMS Dashboard



Step 4: Applicant Dashboard View and Navigation

The dashboard consists of following navigation paths:

1. OhioMHAS Logo
2. Home Tab
3. Application Tab
4. Funding Tab – N/A
5. Maintenance Tab – N/A
6. Report Tab

7. Show My Notifications
8. Show My Allocations
9. Show My Applications
10. My Account Information/ User Management/Logout
11. Gear Icon

OhioMHAS Logo

Clicking “OhioMHAS Logo” will navigate the user to the GFMS dashboard.

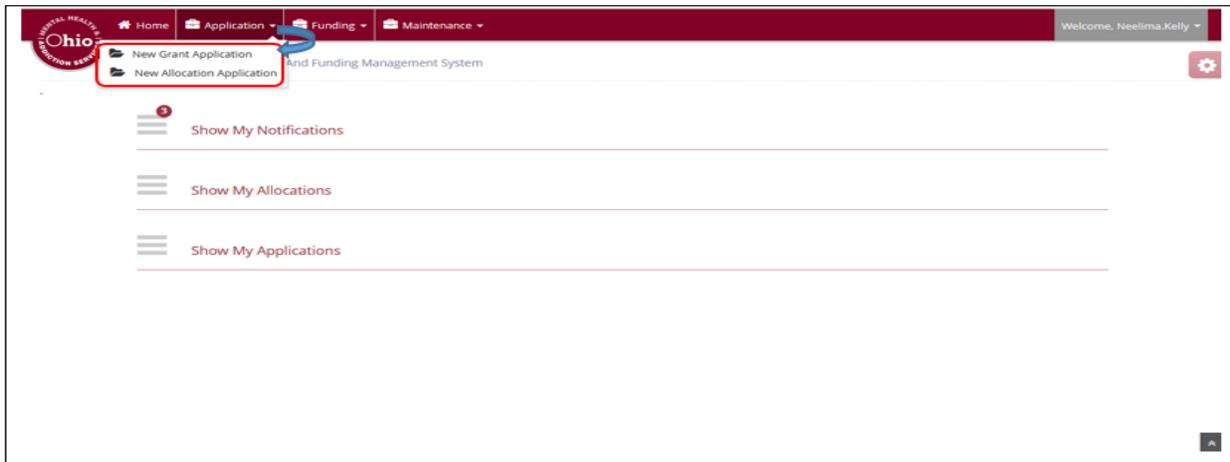
Home Tab

Clicking “Home” Tab will return the user to the GFMS dashboard.

Application Tab

The applications tab provides an applicant the ability to create a new grant application create new allocation application and search grant applications as displayed in the snapshot below:

- **New Grant Application** – Click this link to start a new grant application.
- **New Allocation Application** – Click this link to start a new allocation application.



Funding Tab – N/A

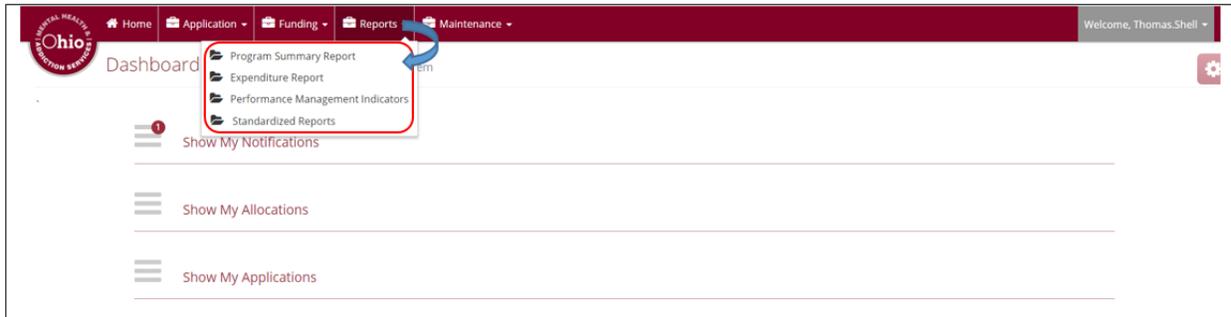
The Funding tab provides applicant after awarded to manage disbursement request.



Reports Tab

The Reports tab provides users the ability to manage following reports options:

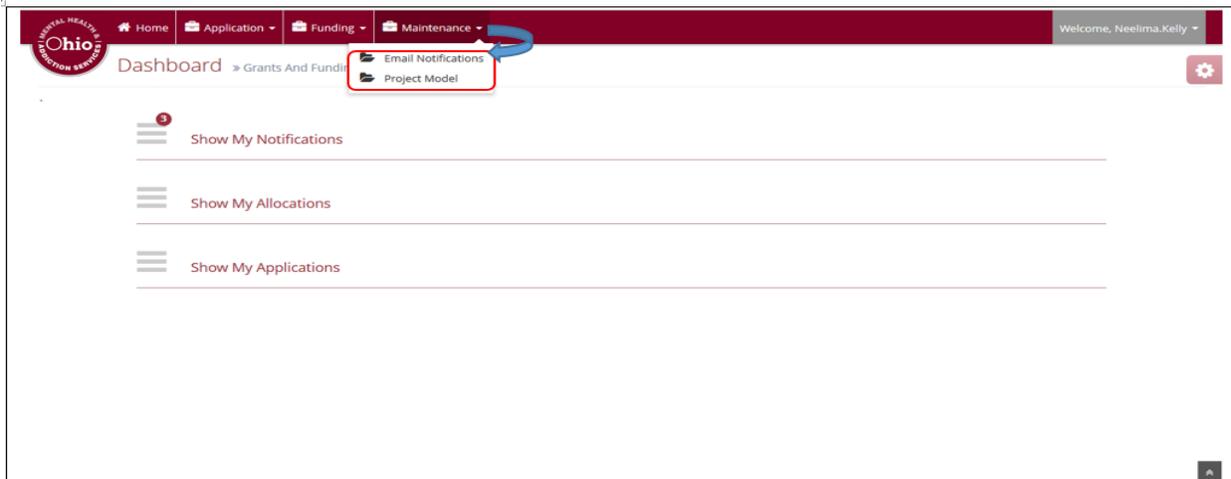
- **Program Summary Report** – Click this link to manage program summary report.
- **Expenditure Report** – Click this link to manage expenditure report
- **Performance Management Indicators** – Click this link to manage performance manage indicator.
- **Standardized Reports** – Click this link to manage standardized reports.



Maintenance Tab – N/A

The Maintenance tab provides an applicant after awarded the ability to manage data values and various controls that manifest on the grant application or other areas of the system.

- **Email Notifications** – Click this link to set email notification preferences.
- **Project Model** – Click this link to manage project model.



Show My Notifications

Click on this link, the 'Show My Notifications' section will be displayed. The notification option provides user the ability to view notifications received as displayed below in the snapshot:

Notifications

GFMS Notification: QA Testing

Show My Applications

Click on this link, the 'Show My Applications' section will be displayed.

Select dropdown fields and click on "**Load Application**" button. You will view applications by selected input.

Show My Applications

Please Select Your Organization Information to View Applications

Organization Name: Africentric Personal Development Shop

Address: 1409 East Livingston Avenue

Load Applications

Details	Fiscal Year	Grant Number	Provider Name	County	Project Area	Requested Amount	Awarded Amount	Distributed Amount	Status
<input checked="" type="checkbox"/> Edit	2016	1600005	Africentric Personal Development Shop	Franklin	RTTT	1250	0		Draft

Show My Allocations

Click on this link, the 'Show My Allocation' section will be displayed.

Select dropdown fields and click on **Load Allocations** button. You will view allocations by selected input.

Show My Allocations

Please Select Your Organization Information to View Your Allocation

Organization Name: Wood County FCFC

Address: PO Box 679

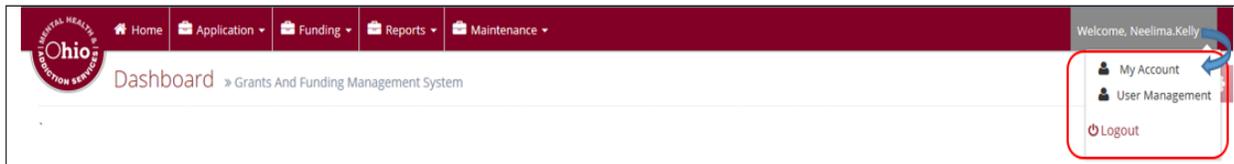
Load Allocations

Details	Organization	Address	Allocated Amount	Status
<input checked="" type="checkbox"/> Edit	Wood County FCFC	PO Box 679	1000	Validation Draft
<input checked="" type="checkbox"/> View	Wood County FCFC	PO Box 679	500	Validation Required

My Account Information/Logout

Clicking “Welcome, User Name” provides the following option for the user:

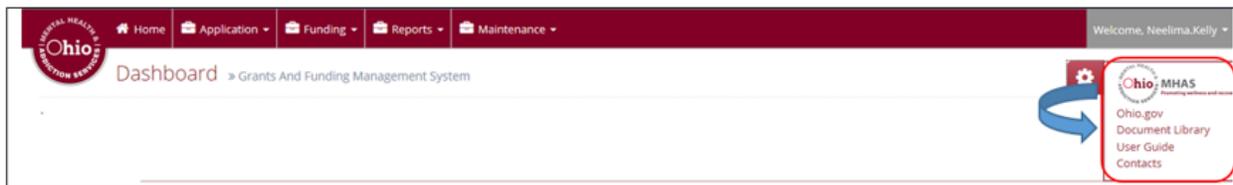
- My Account- Clicking this link provides user the ability to manage account information.
- User Management – Clicking this link, navigates user to the I-Portal Dashboard.
- Logout: To exit the system, select the arrow by the user name and click the ‘logout’ link



Gear Icon

Clicking this icon provides a window dropdown of useful links for the user. Clicking the gear icon again closes the window.

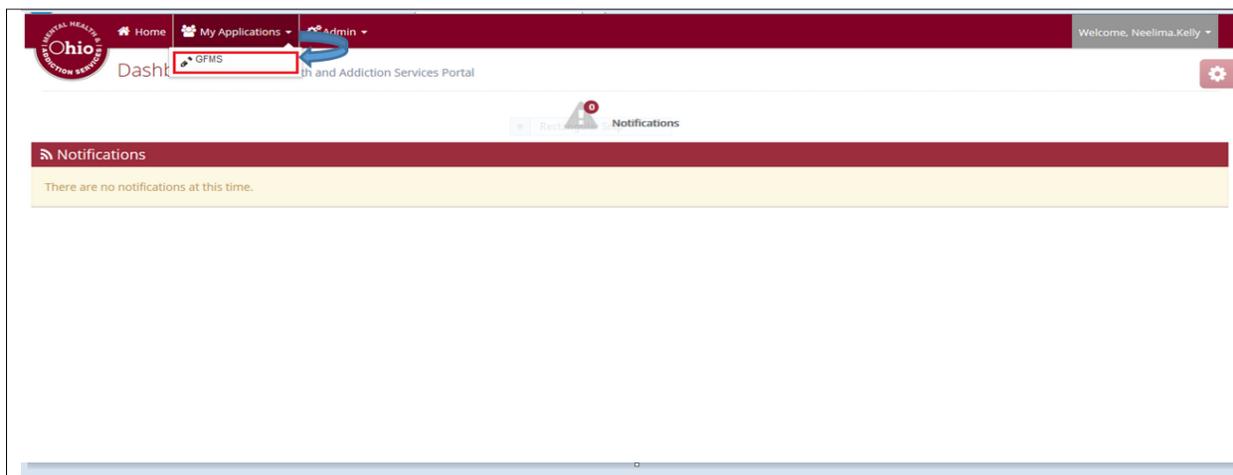
- **Ohio.gov** – Clicking on this link, navigates you to ohio.gov (Ohio government) information website.
- **Documentary Library**- Clicking on this link navigates you to mha.ohio.gov website.
- **User Guide** – Clicking on this link navigates you to GFMS User Guide (Not Available)
- **Contacts**- Clicking on this link navigates you to OhioMHAS Lead (Project Lead) contact list.



Create a New Allocation Application:

Step 1: Login to GFMS (Getting Started)

1. **Login** to IPortal and **select “GFMS”** from **“My Applications”** on the menu bar to apply for an allocation as displayed in the snapshot below:



2. Under the “**Application**” tab, **select** the “**New Allocation Application**” option as displayed in the snapshot below:



Step 2: Allocation Face Sheet

You are on the first page, “**Allocation Face Sheet**” of the allocation application. Here you will **verify** the organization name, address and state fiscal year for which you are applying as displayed in the snapshot below:

Fields with a red asterisks * are required fields.

1. **Select** the **Organization Name** - select from the dropdown list (Organization Name will be your county name + FCFC)
2. **Select** the **Location Address** – Should be the Administrative Agent’s address
3. **Select** the **State Fiscal Year** – Select the year for which you are applying for funding
4. **Click** the **Create** button to advance to the next screen



The screen will update and require you to enter the contact information for your Organization. **We have defined the roles** within the FCFC as they pertain to the required fields on the Allocation Face Sheet displayed in the snapshot below:

5. **Click** on the **Search** button and then enter the required information, as defined below:

- **Mailing Address** – Select the mailing address (this address will be populated based off the information the applicant listed as their address when registering for the user name and password and may be the same as your location address in step i. above on page 18).
 - **Primary Contact** - This should be the name and contact information of the Administrative Agent (AA) on file with Ohio Family and Children First (OFCF) (i.e., Director, Superintendent, Commissioner, or Judge. Do not enter an AA designee in this field).
 - **Secondary Contact** - This should be the name and contact information of the FCFC Coordinator/Director.
 - **Fiscal Officer** - This should be the person that handles the day-to-day fiscal processes pertaining to your county FCFC. If you do not have an assigned fiscal office, then repeat the AA contact information to bypass this required field.
6. **Click** on the **Next** button to advance to the next screen.

The screenshot shows the 'Allocation Face Sheet' form in the 'Grants And Funding Management System'. The form is titled 'Allocation Face Sheet' and is part of the 'GRMS' system. The navigation bar includes 'Home', 'Application', 'Funding', 'Reports', and 'Maintenance'. The user is logged in as 'Welcome, Neelima Kelly'. The form fields are as follows:

- Organization: Murtis Taylor Human Services System
- Location Address: 11410 Buckeye Road
- State Fiscal Year: 2016
- Mailing Address: 13422 Kinsman Road test
- Primary Contact First Name: Percy
- Primary Contact Last Name: Inman
- Primary Contact Phone Number: (614) 528-9632
- Primary Contact Email Address: pi@gmail.com
- Secondary Contact First Name: Dianna
- Secondary Contact Last Name: Hill
- Secondary Contact Phone Number: (614) 852-9654
- Secondary Contact Email Address: 111222@12.com
- Fiscal Officer First Name: James
- Fiscal Officer Last Name: Hill
- Fiscal Officer Phone Number: (614) 254-8525
- Fiscal Officer Email Address: jameshill@ohio.mha.gov

A red box highlights the 'Search' button above the Mailing Address field, with a blue arrow pointing to the dropdown menu. Another red box highlights the 'Next' button at the bottom of the form.

Step 3: Allocation Organization Information

The Organization Information page is read only and provides information captured from the initial registration process of the applicant organization required to provide access to the GFMS.

1. **Click** on the **Next** button to be taken to the next screen as displayed in the snapshot below:

Allocation Organization Information > Grants And Funding Management System

The information on this page is view only and cannot be changed. In order to update any organization information please login to IPortal, use the search organization screen to search, edit and update information

Implementing Organization:	Murtis Taylor Human Services System	Implementing Organization's Phone Number:	(216) 663-5338
Implementing Organization's Mailing Address:	13422 Kinsman Road test	City:	Cleveland
State:	OH	Zip:	44120
ADAMHS/ADAS Board:	Murtis Taylor Human Services System	Federal Tax ID:	237158458

Next



The information on this page is view only and cannot be changed. In order to update the information on this page, you will need to contact the OhioMHAS Helpdesk via email at MHAHelpdesk@mha.ohio.gov or call 614-466-1483

Step 4: Allocation Allocated Funding

This page captures the funding that has been allocated to the organization. The information on this page is view only.

1. **Click** on the **Next** button to be taken to the next screen.

Allocation Allocated Funding > Grants And Funding Management System

Program Area	Funding Source	Amount
AB Program Area	Test 9	\$4,000.00
Community Investments	Test 8	(\$474.45)
Total Amount Allocated:		\$3,525.55

Next

Step 5: Allocation Federal Requirements

The Allocation Federal Requirement page gathers additional information that may be needed for federal reporting.

1. **Select** and **Enter** the information as indicated per each field on “Allocation Federal Requirement” screen.

Please note: This screen requires you to provide your AA’s Executive Director’s contact information as well as the President of Board of Directors. If your AA’s organizational structure does not include a President of Board of Directors, then just repeat the Executive Director’s name and contact information to bypass these required fields.

The screenshot shows the "Allocation Federal Requirements" form within the "Grants And Funding Management System". The form is divided into several sections for data entry:

- Executive Director's Information:** First Name (Stephen), Last Name (Kron), Mailing Address (54 northglen rd), City (Columbus), State (Ohio), Zip (43224), Phone Number ((614) 787-9876), and Office Number ((234) 343-4324).
- President of Board of Directors:** Name (Sabin Hill), Email (sh@gmail.com).
- Other Identifiers:** DUNS Number (654646459), I-BHS Number (requested for behavioral health treatment providers), and Congressional District (9,11,14,16).
- Revenue Question:** A dropdown menu asks "Do you receive 80% or more of your annual gross revenue or \$25,000,000 or more from federal funding?" with "No" selected.
- Buttons:** An "Add Executive" button is present, and a message states "There are no Executive List at this time." A "Next" button is at the bottom.

2. If your organization receives \$25,000,000 or more from federal funds you will be required to enter an additional Executive within the organization. You are only required to enter one (1) Executive, but you have the option to enter up to a maximum of five (5) Executives.

- To add Executive Directors, **select** the **Add Executive** button on the Allocation Federal Requirements screen, an “Add Executive” pop-up window will be displayed. In the “**Add Executive**” pop-up window, **enter** the required information and **select** the **Add** button.
- Repeat steps #3 and #4 up to 5 of the Executives have been added. The maximum limit to add executives are up to 5. Executive information will be displayed under “Executive Listing” table.

Action	First Name	Last Name	Title	Email	Yearly Income
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Alan	Rogers	Manager	ar@gmail.com	75000
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Neelima	Kelly	Manager	nn@gmail.com	60000
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Neelima	Dutta	Manager	nd@gmail.com	60000
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Patty	Inman	Manager	pi@gmail.com	80000
<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	Zareen	Syed	Manager	zs@gmail.com	70000

- After all of the required information has been added, select the **Next** (Data is saved) button to progress to the next screen.

Step 6: Allocation Documentation

The Allocation Documentation screen is where the Insurance Policy, Annual Financial Reporting Audit, program documentation, MOU and any additional documents will be attached (uploaded).

The Allocation Documentation contains the following sections as captured in the snapshot below:

- **Uploaded Proof of Liability** – Not required, this field is optional
- **Uploaded Annual Financial Report Audit** – Not required, this field is optional
- **Upload Program Documentation** – N/A
- **Upload MOU** – N/A
- **Upload Additional Attachments** – N/A

Once you have uploaded your document OR if you would like to bypass this screen, select the **Next** button. If you choose to upload documents refer to “How to Upload Documents” on page 24 of this User Guide.

The screenshot shows the 'Allocation Documentation' screen in the Grants And Funding Management System. The page title is 'Allocation Documentation > Grants And Funding Management System'. The user is logged in as 'Welcome, Neelima.Kelly'. The left sidebar shows the navigation menu with 'Allocation Documentation' selected. The main content area is divided into several sections:

- Uploaded Proof of Liability**: This section includes a link to upload the Proof of Liability page of the Insurance Policy. Below the link is a table with columns: Document Name, Description, Uploaded Date, and Uploaded By. The form fields are:
 - a. Insurance Carrier:
 - b. Policy #:
 - c. Insurance Amount: \$
 - d. Date of Expiration:
- Uploaded Annual Financial Reporting Audit**: This section includes a link to upload the Findings page of the Annual Financial Reporting audit or Auditable financial statements. Below the link is a table with columns: Document Name, Description, Uploaded Date, and Uploaded By. The form fields are:
 - a. Has the agency had a current Annual Financial Reporting Audit within the past 12 months?
 - c. Any Findings?
- Uploaded Program Documentation**: This section includes a link to upload Program Documentation. Below the link is a table with columns: Document Name, Description, Uploaded Date, and Uploaded By.
- Uploaded MOU**: This section includes a link to upload the MOU - Memorandum of Understanding (if required). Below the link is a table with columns: Document Name, Description, Uploaded Date, and Uploaded By.
- Uploaded Additional Attachments**: This section includes a link to upload Additional Attachments. Below the link is a table with columns: Document Name, Description, Uploaded Date, and Uploaded By.

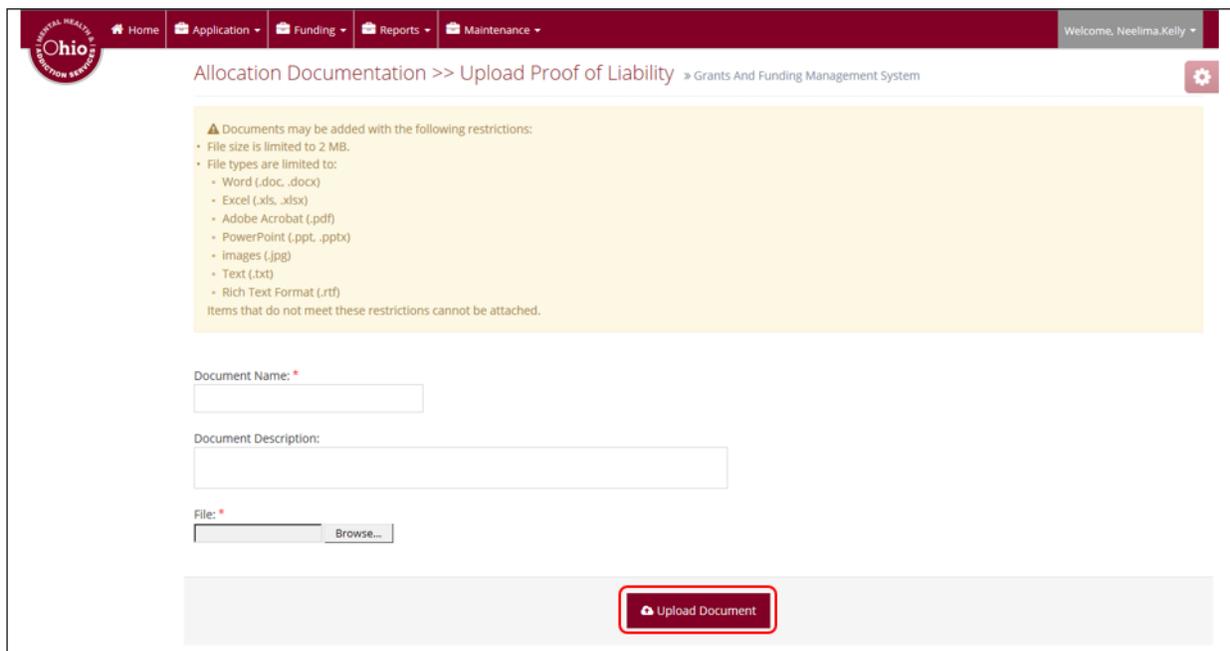
A 'Next' button is located at the bottom right of the screen.

Step 7: How to Upload Documents

1. All documents on the “Allocation Documentation” screen will be attached in the same manner.
2. To attach the “Proof of Liability” page, **click** on the Click Here to Upload link, which is designated by the pointing hand icon.



3. A pop-up window will appear to allow for the uploading of the document.
4. Fields with red asterisks * are required fields.
5. To attach a document, **select** the Browse button.
6. **Select** the file from your computer that is to be attached and then **select** the Upload Attachment button:



Please be aware of the restriction on the documents attachments.



▲ Documents may be added with the following restrictions:

- File size is limited to 2 MB.
- File types are limited to:
 - Word (.doc, .docx)
 - Excel (.xls, .xlsx)
 - Adobe Acrobat (.pdf)
 - PowerPoint (.ppt, .pptx)
 - images (.jpg)
 - Text (.txt)
 - Rich Text Format (.rtf)

Items that do not meet these restrictions cannot be attached.

Uploaded Proof of Liability

1. Enter the information as indicated for each field.
2. See the section titled; 'How to Attach Documents' for instructions on how to attach the required documents.
3. Once the document has been uploaded, it will appear in the table titled, "Uploaded Proof of Liability" as highlighted in the snapshot below:

[Click Here to Upload the Proof of Liability page of the Insurance Policy to this section.](#)

Uploaded Proof of Liability

	Document Name	Description	Uploaded Date	Uploaded By
View Delete	Insurance Doc	Insurance Doc	4/29/2016	Neelima.Kelly

a. Insurance Carrier:

b. Policy #:

c. Insurance Amount: \$

d. Date of Expiration: 

4. If this is the only section in the 'Allocation Documentation' screen that needs completed, select the Next button.
5. If there are other sections in the 'Allocation Documentation' screen that needs to be completed, then proceed to the next section on the screen.

Uploaded Annual Financial Reporting Audit

1. Enter the information as indicated for each field.
2. If you select the answer Yes to question a, then you will be required to provide a 'Date the Audit was Completed'.
3. If you select the answer Yes to question c, then you will be required to provide an explanation.
4. Attach the last 3 signature pages (ONLY).
5. See the section titled; 'How to Attach Documents' for instructions on how to attach the required documents.
6. Once the document has been uploaded, it will appear in the table titled, "Uploaded Annual Financial Reporting Audit".

[Click Here to Upload the Findings page of the Annual Financial Reporting audit or Auditable financial statements.](#)

Uploaded Annual Financial Reporting Audit						
		Document Name	Description	Uploaded Date	Uploaded By	
View	Delete	Audit Report	Audit Report	4/29/2016	Neelima.Kelly	

a. Has the agency had a current Annual Financial Reporting Audit within the past 12 months?

b. If Yes: Date the Audit was completed: *

Time Period the Audit From:

Time Period the Audit To:

c. Any Findings?

If Findings, please explain: *

7. If this is the only section in the “Allocation Documentation” screen that needs completed, select the Next button.
8. If there are other sections in the “Allocation Documentation” screen that needs to be completed, then proceed to the next section on the screen.

Step 8: Allocation Assurance

The Allocation Assurances screen is where the user will read and ***digitally sign*** the Assurances document.

1. **Select** the View link in the “Assurance” table to read the assurance document.
2. **Mark** the checkbox for “**I Agree**” to digitally sign that the assurance has been reviewed and agreed to.
3. **Click** on Next button to save and update.

Allocation Assurance » Grants And Funding Management System

Please read the Assurances carefully by clicking on its title. Then select the checkbox next to the Assurances to indicate that you agree.

Checking the box below is the equivalent of a digital signature. By checking these box, you indicate that you agree in full to the specified Assurances as it is presented and that you are the CEO of the agency applying for the funds specified on this grant application or a delegate acting on their behalf.

Action	Assurances	Fiscal Year	Signatory	Date of Signature	I Agree
View	Ohio Mental Health & Addiction Services	2016			<input type="checkbox"/>

[Next](#)

4. Once you check the “I Agree” button a Signatory Name and Date of Signature will populate and be displayed in the Assurance table as highlighted below in the snapshot:

Allocation Assurance » Grants And Funding Management System

GFMS

ALLOCATION

- Allocation Face Sheet
- Allocation Organization Information
- Allocation Allocated Funding
- Allocation Federal Requirements
- Allocation Documentation
- Allocation Assurance**
- Allocation Signature
- Allocation Submit
- Allocation Approval

Please read the Assurances carefully by clicking on its title. Then select the checkbox next to the Assurances to indicate that you agree.

Checking the box below is the equivalent of a digital signature. By checking these box, you indicate that you agree in full to the specified Assurances as it is presented and that you are the CEO of the agency applying for the funds specified on this grant application or a delegate acting on their behalf.

Action	Assurances	Fiscal Year	Signatory	Date of Signature	I Agree
View	Ohio Mental Health & Addiction Services	2016	Neelima.Duttala	4/27/2016	<input checked="" type="checkbox"/>

[Next](#)

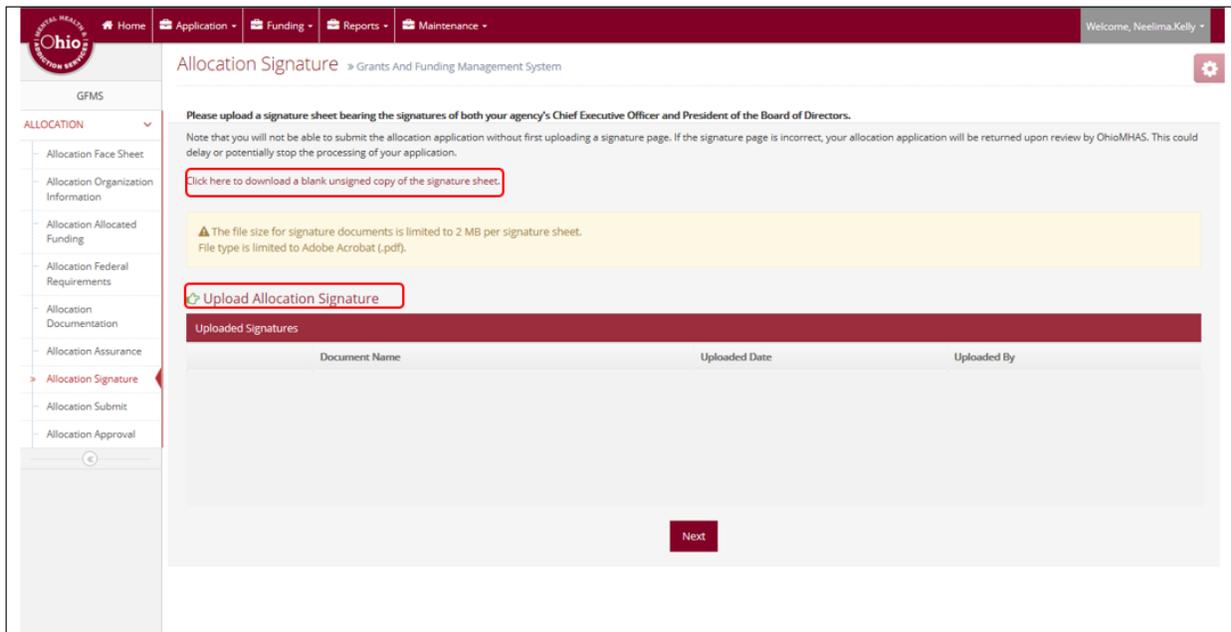
5. **Click** on **Next** button to progress to the next screen

Step 9: Allocation Signature

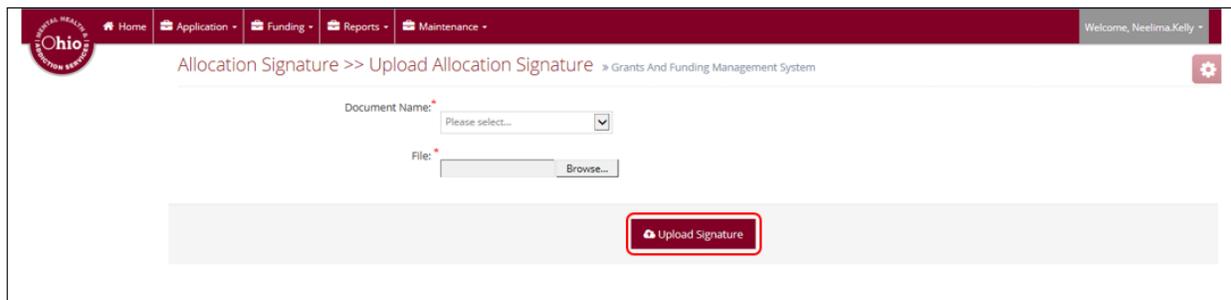
The Allocation Signature screen is where the unsigned copy of the signature sheet can be downloaded, signed, and then uploaded back into the application.

1. **Click** the link to **download** the signature sheet, which looks like this:
[Click here to download a blank unsigned copy of the signature sheet.](#)
2. The signature sheet will be opened in a PDF format.
3. **Print** the document.
4. Have your AA (or Designee) on file with your OFCF office **sign** the signature page.
5. **Scan and save** the document to your computer.
6. **Attach** the signed Signature sheet to the application: Select the Upload Allocation Signature link, which looks like this:

[Upload Allocation Signature](#)



7. The Upload Allocation Signature pop-up window will appear, as displayed on the screen shot below:
8. **Select the Document Name.**
9. Select the saved file containing your signed signature page (from step 5 above)
10. **Click on Upload Signature** button. See the step 6 of this user guide titled: "How to Upload Documents: for detailed instructions.



11. The Signature Document will be listed in the "Uploaded Signatures" table as highlighted below in the snapshot:

Allocation Signature > Grants And Funding Management System

Please upload a signature sheet bearing the signatures of both your agency's Chief Executive Officer and President of the Board of Directors.

Note that you will not be able to submit the allocation application without first uploading a signature page. If the signature page is incorrect, your allocation application will be returned upon review by OhioMHAS. This could delay or potentially stop the processing of your application.

Click here to download a blank unsigned copy of the signature sheet.

⚠ The file size for signature documents is limited to 2 MB per signature sheet.
File type is limited to Adobe Acrobat (.pdf).

Upload Allocation Signature

Uploaded Signatures			
	Document Name	Uploaded Date	Uploaded By
🔍 View	Prevention Signature	4/23/2016	Senthikumar.Rajagopal

Next

Please note the restrictions for uploading this signature document.



⚠ The file size for signature documents is limited to 2 MB per signature sheet.
File type is limited to Adobe Acrobat (.pdf).

Step 10: Submit Allocation Application

The Allocation Submit screen is where the application will be checked to assure all required fields are complete and the application will be submitted to OhioMHAS for review.

1. Select the **Submit Application** button.

Submit Allocation Information > Grants And Funding Management System

Please review all of the application information to assure that the information is correct and complete. Once the application has been submitted, it will be reviewed by the appropriate staff.

If you have questions or concerns about how to fill out your application, please refer to the Help Documentation and/or call the project lead listed below.

Project Lead:

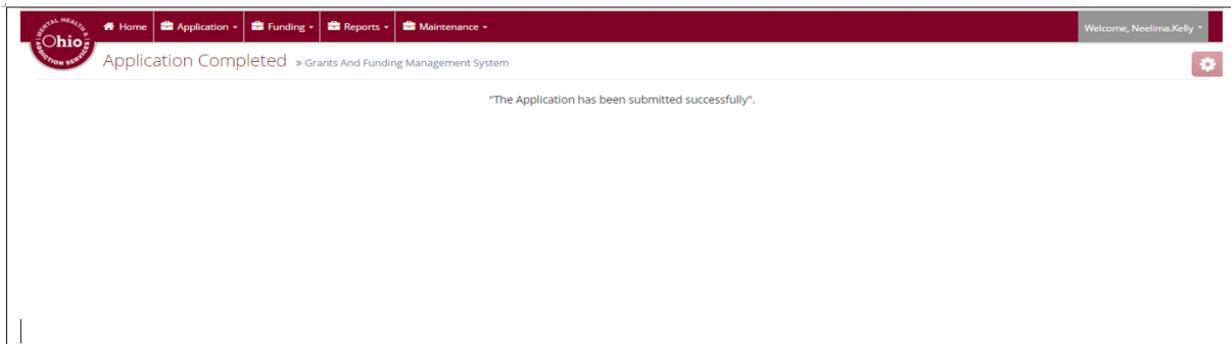
Name: Senthikumar.Rajagopal

Email: Senthikumar.Rajagopal@mha.ohio.gov

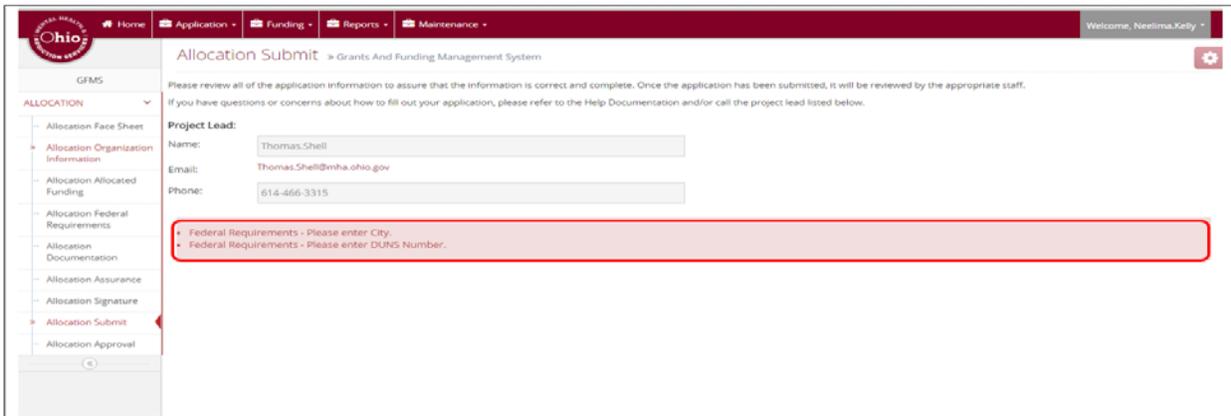
Phone: 614-466-2608

Submit Allocation

2. The system will display “Application Completed” screen where you can view a message “The Application has been submitted successfully”



3. If the required information is not entered and the application is incomplete the, the system will give an error message, example highlighted in the snapshot below:



4. Make the necessary changes on the application, and then **select** the **Submit Application** button again.

Congratulations you have successfully submitted your Allocation Application for funding!