APPLICANT USER GUIDE

GETTING STARTED WITH GRANTS AND FUNDING MANAGEMENT SYSTEM

MENTAL HEALTH & ADDICTION SERVICES
Ohio MHAS
Promoting wellness and recovery

USER GUIDE

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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 for all OhioMHAS funds (federal and state) to support proposal, submission, management, and all required (federal and state) data collection. The system provides a mean for an organization to apply for funding, report progress on identified outcomes, report expenditures, and to draw-down funds into request reimbursement for the services. This guide describes how to utilize the functionality of the Grant and Funding Management System for all the users.

Who is this document for?

This document is intended for an **Applicant** which provides their entire view and functionality of Grant and Funding Management System (GFMS).

Regarding page permissions and access roles, a section is added called "Page Permissions and Access Roles" for each page which lists what permission each role has.

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. For GFMS, External User "**Roles**" are Applicant, Applicant after awarded, Board Manager and External Reviewer. External User Registration process consist of following steps:

Step 1: Navigate to GFMS link

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

Step 2: "Welcome Screen"- Link to Register

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

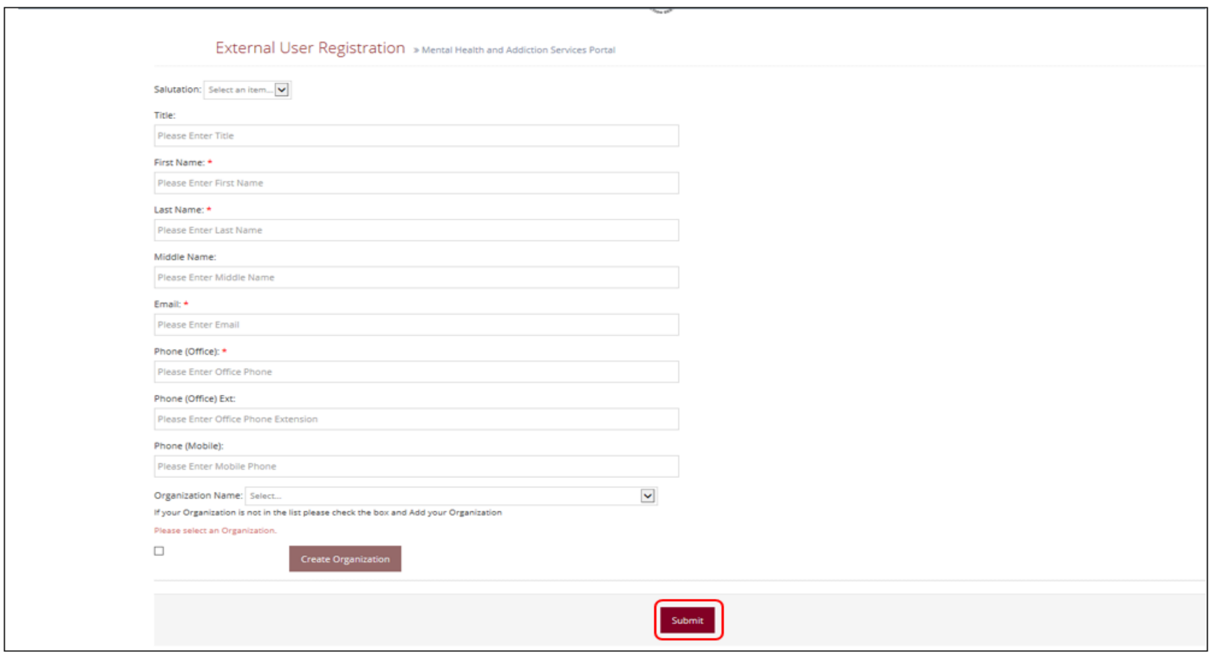
   ***Note:* All user accounts have been brought over from other applications. No need to register for the application.**
III. For Registration**, Click** on Here button for a **"New User**", displayed on the "**Welcome"** Screen as highlighted below in the snapshot:

Step 3: "External User Registration"- Find New Organization

I. **Select** and **Enter** the information as indicated per each field as displayed on the "External User Registration" screen.

II. Fields with red asterisks * are required fields.

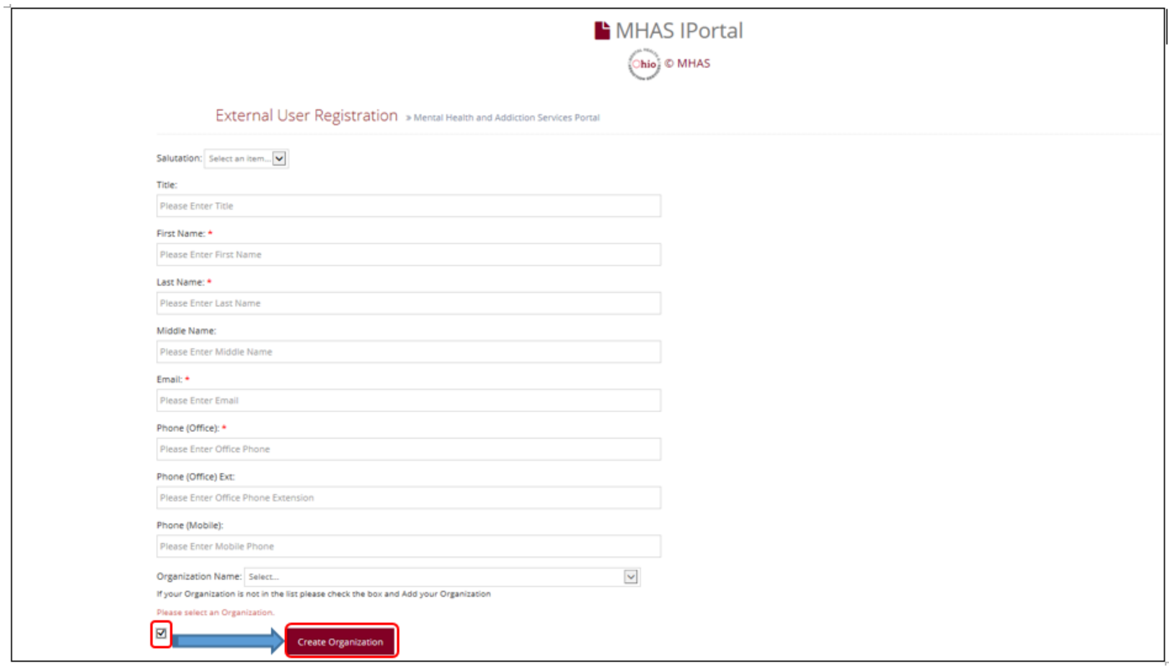
III. If you find your organization under the "Organization Name" dropdown, **select** your organization and **click** on the Submit button as highlighted below in the snapshot (Continue to Step 5). At this point, Create Organization button is grayed out.



Step 3a: "External User Registration"- Create Your Organization

I. If you don't find your organization name under "Organization Name" dropdown, **select** the checkbox next to the Create Organization button.

II. **Select** the Create Organization button.

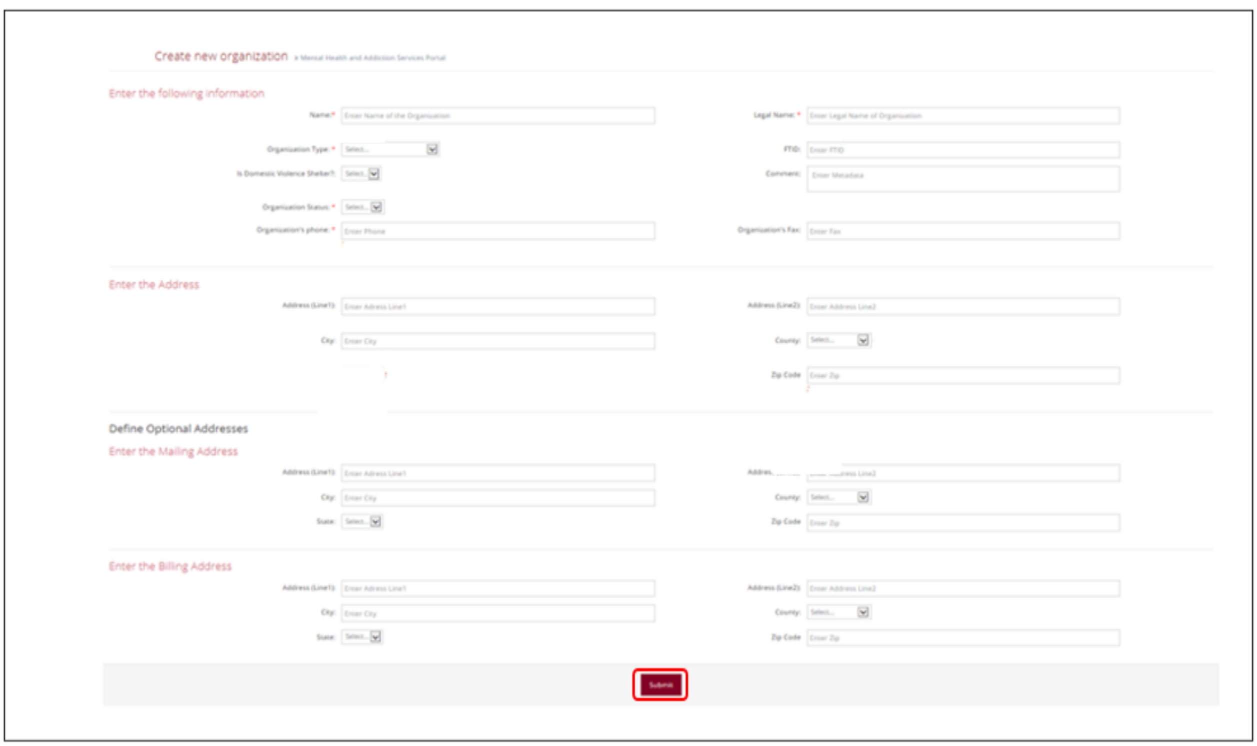


Step 3b: Enter Organization Information on "Create New Organization" Screen:

I. **Select** and **Enter** the information as indicated per each field displayed on the "Create New Organization" screen.

II. Fields with red asterisks * are required fields.

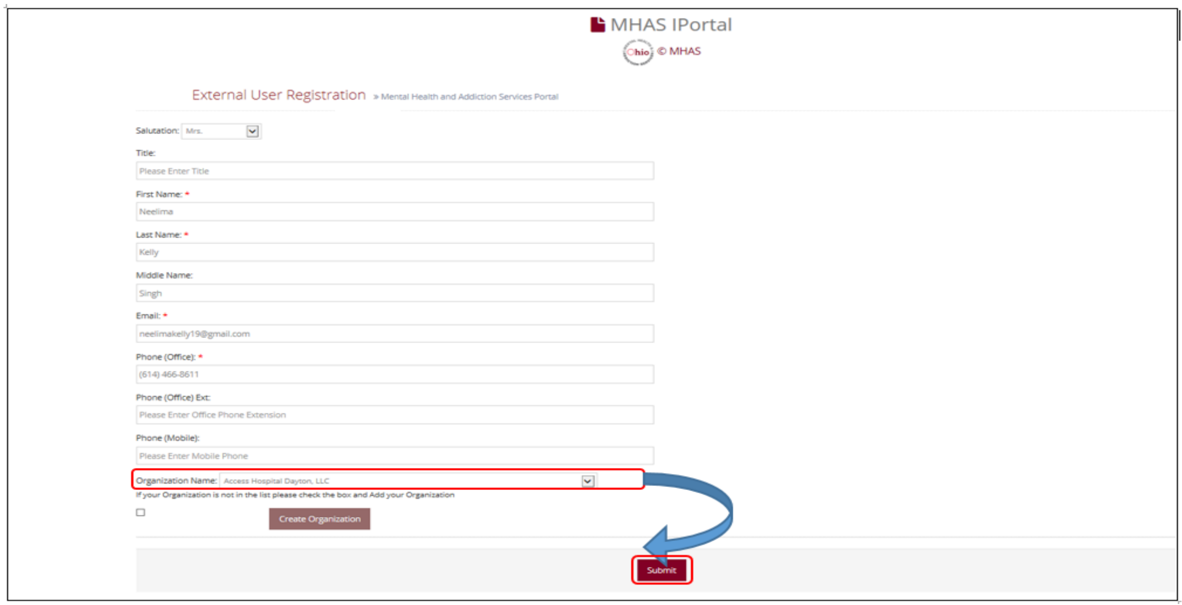
III. **Click** on Submit button.



The organization information entered on this page will be used to prepopulate the “Organization Information” Page under Application Tab in GFMS. In order to update the information on this page the GFMS Application Admin or I-Portal Admin will need to make the update via the I Portal registration screen.

Step 4: Navigated back to “External User Registration” Screen

I. Now user can **view** added organization name under the “Organization Name” dropdown on the “External User Registration” screen.
II. **Select** your organization name from the “Organization Name” dropdown.
III. **Click** on Submit button

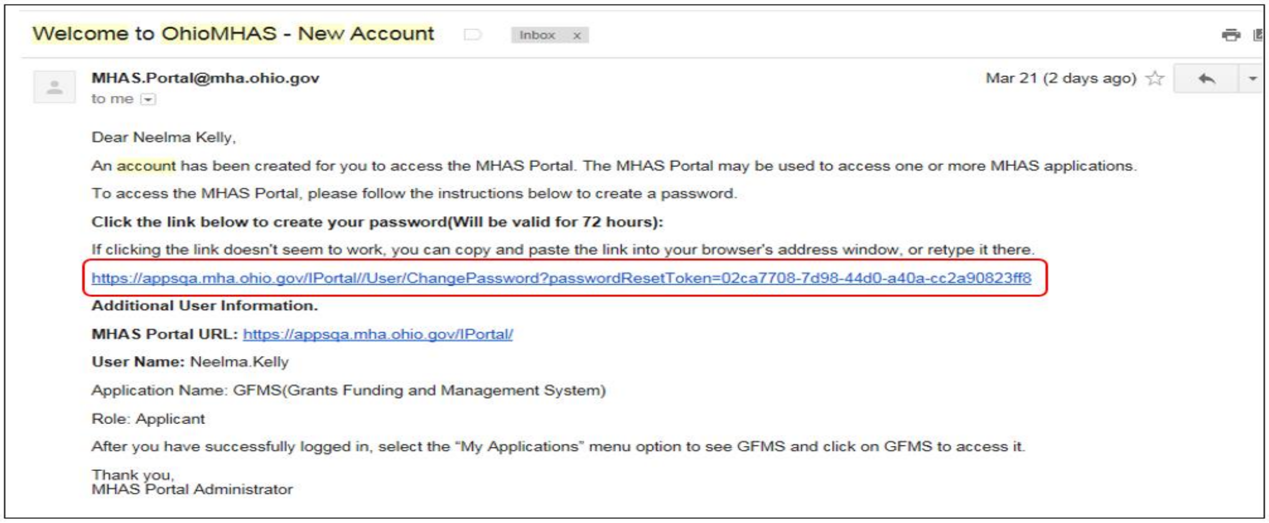


Step 5: “Successfully Registered” Screen.

I. 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 inform 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 6: Welcome to OhioMHAS New Account Email Notification- Navigate to Create a Password.

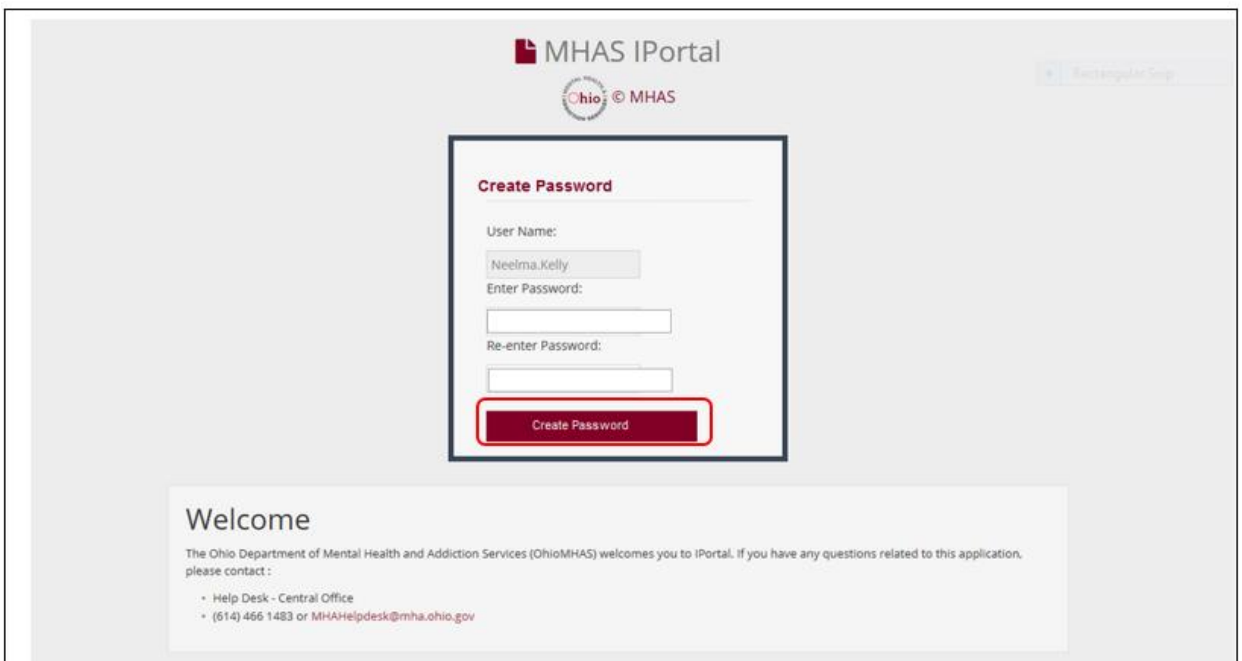
I. External User will be receiving a Welcome email notification from IPortal Administrator that account has been created to access IPortal. A link will be provided in the email to create a password. There would be another link for login to IPortal.
II. To Create a Password**, Click** on the link highlighted below in the snapshot:



Step 7: Create Your Password

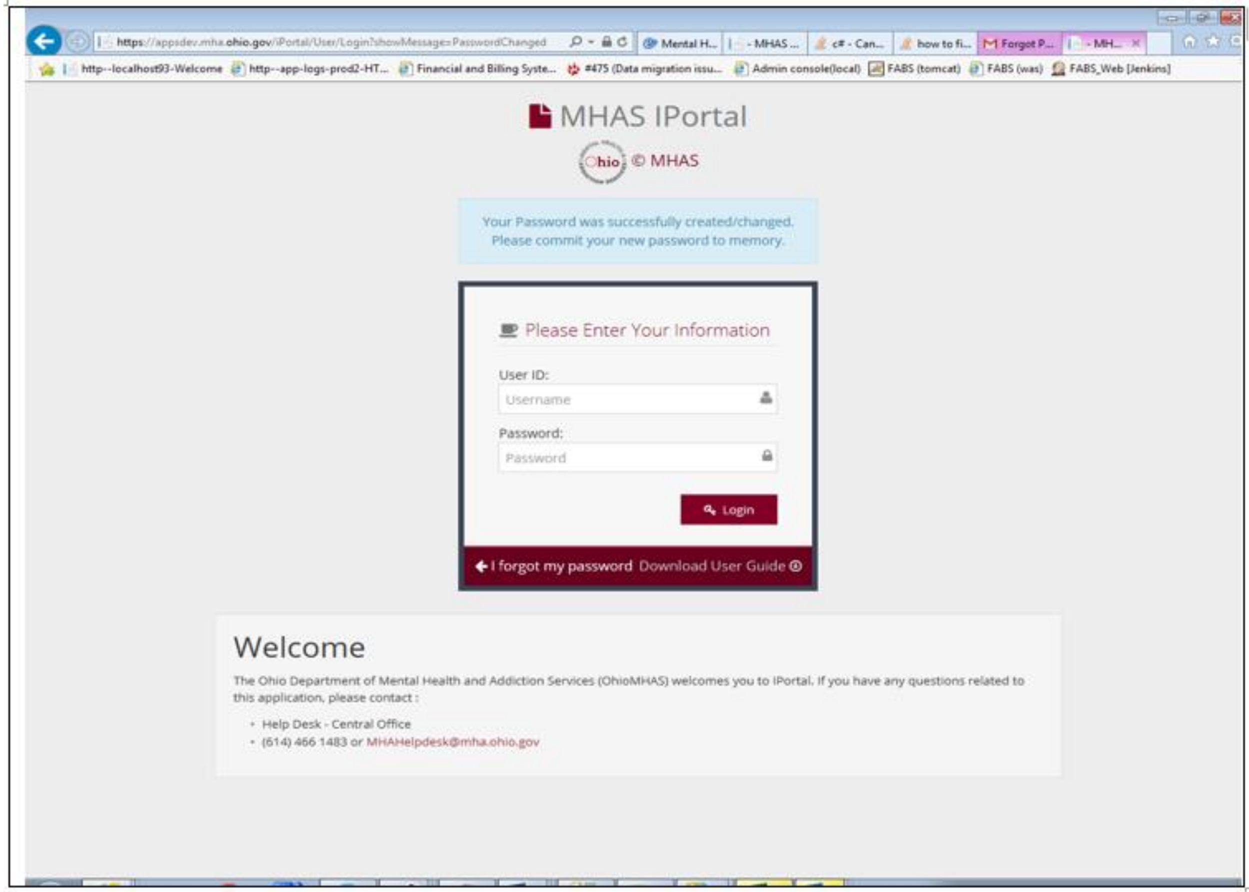
i. **Enter** your password on the basis of following defined Standard Password Requirements:
   - Password must be 8-20 characters long.
   - Password must contain at least one character from each of the following categories:
     - English letter (Aa-Zz)
     - Digits (0-9)
     - Special symbols (!#$%_).

ii. **Click** on Create Password button. (Continue to Step 8)



III. An information message "Your password is successfully created" will be displayed and providing user an option to login to the application

IV. Enter your login credentials and click on Login button to move forward in the application.



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

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

Step 2: "Welcome Screen"- Link to Login

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

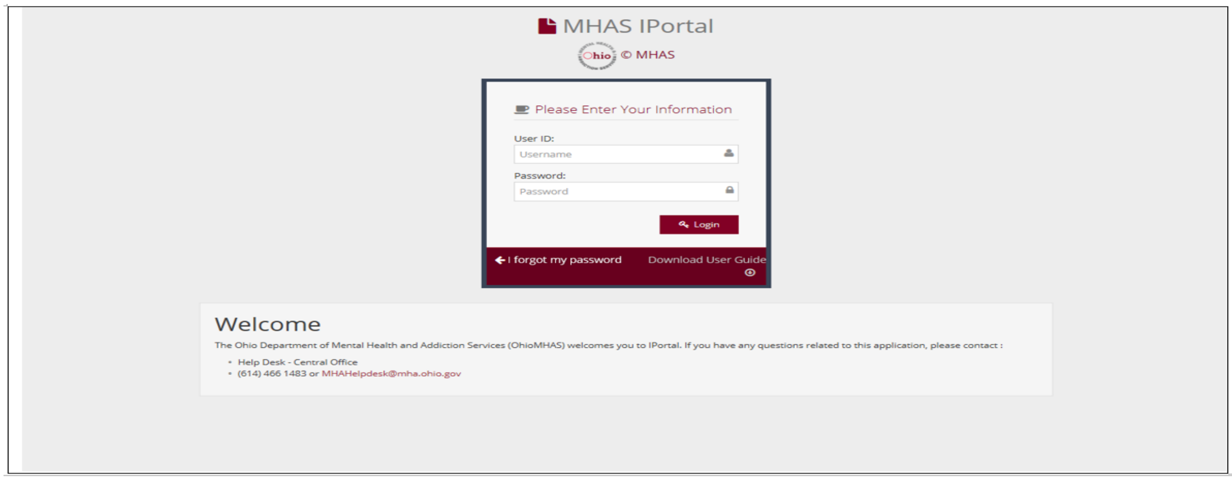
II. When the user navigates to the **"Welcome"** screen, they will be provided two options Register (New User "Has never logged into an OhioMHAS Applications before") or Login (Existing User "Has logged into previous OhioMHAS Applications before" –OLGA and POPS) for GFMS

III. 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:

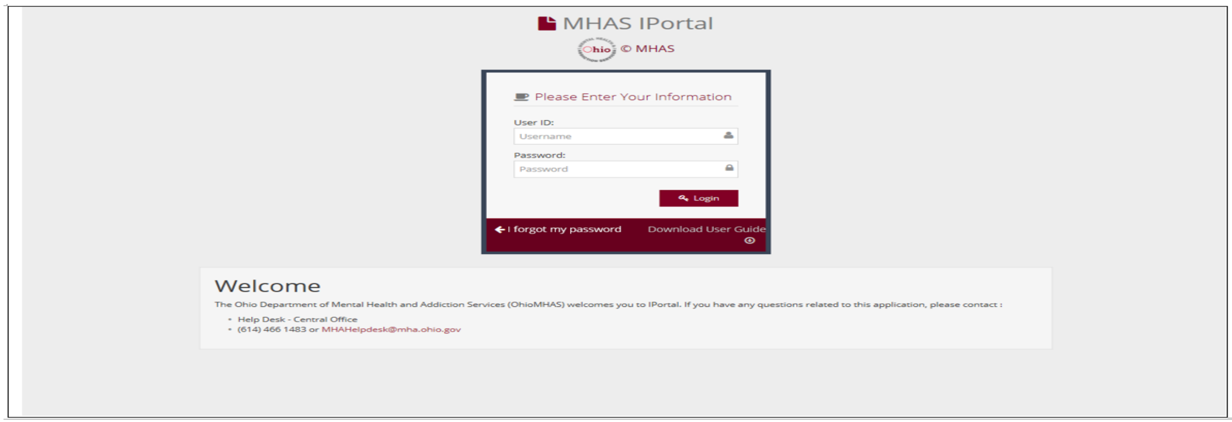
I. Enter your login credentials and click on Login button, the user will be navigating to the I-Portal Dashboard.



External User- Forgot Password

Step 1: From IPortal Login Screen- Click Forgot Password Link

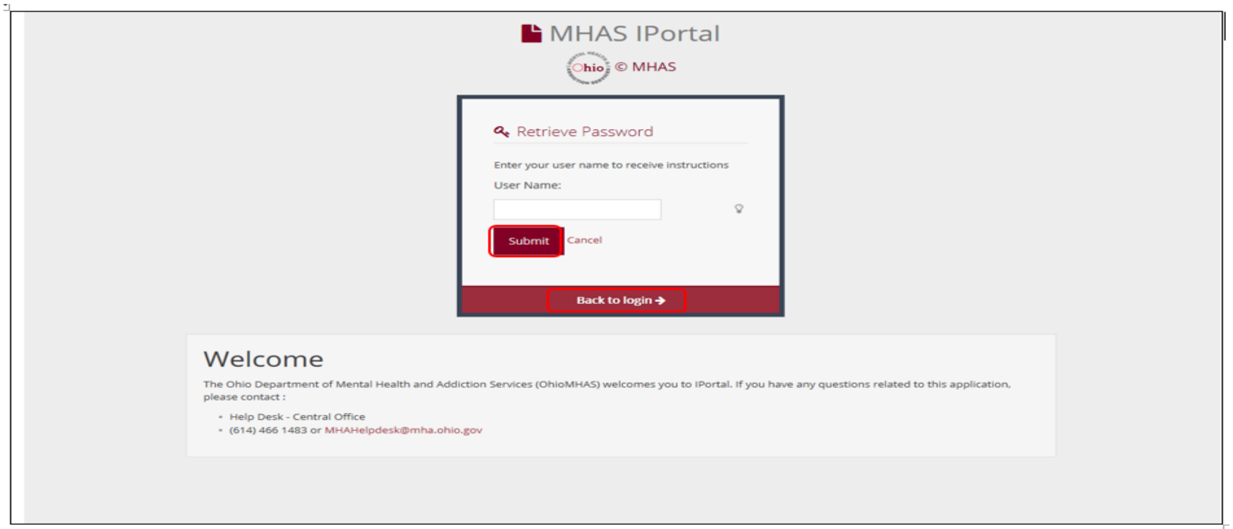
I. Click on the link “I forgot my password” as displayed on the following snapshot:



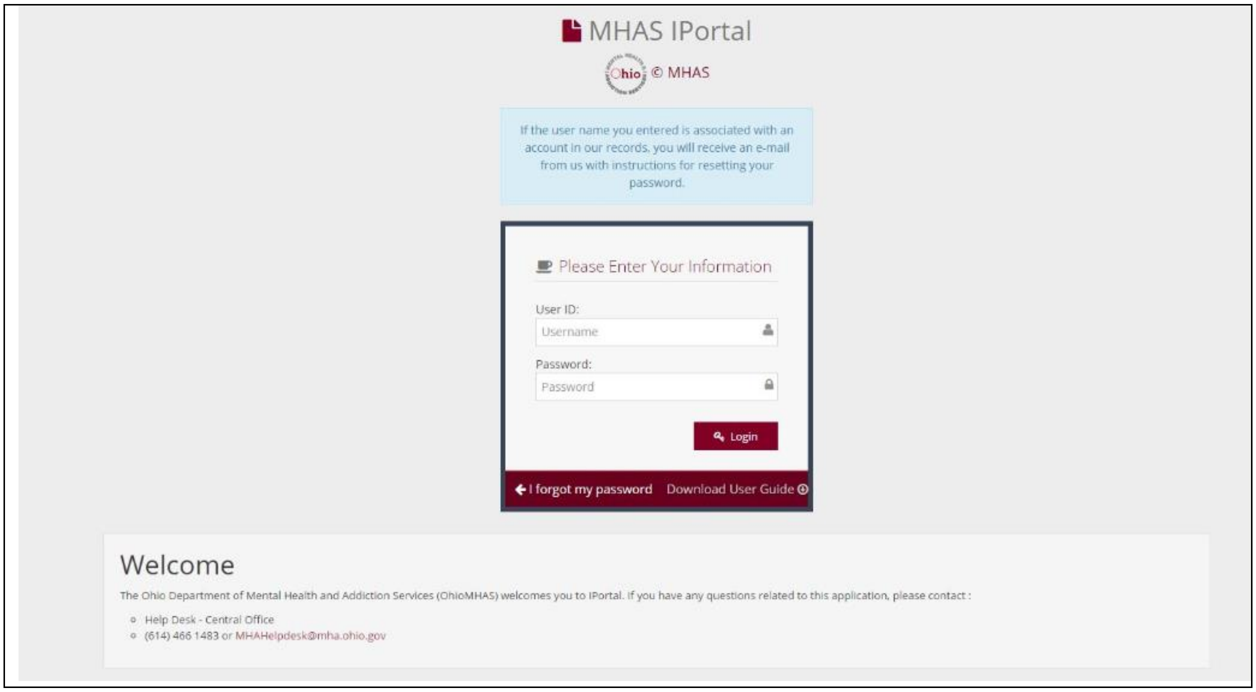
Step 2: Enter User Name on Retrieve Password Screen:

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

II. 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.



III 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.



Step 3: Forgot Password Assistance Email Notification- Click on Rest Password Link

I. You will be receiving a "Forgot Password Email Notification" from IPortal Administrator, providing a link to reset a password.

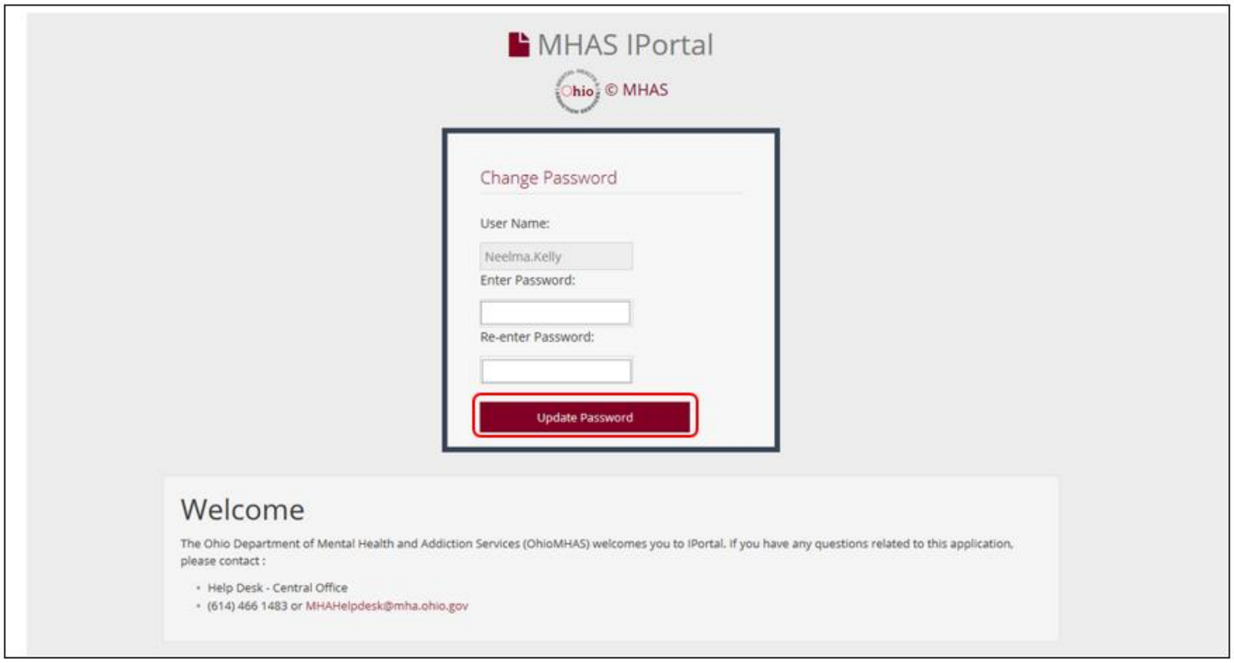
II. **Click** on the link to reset your password as highlighted below in the snapshot:

Step 4: Change Password

iii. **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 (!#$%_).

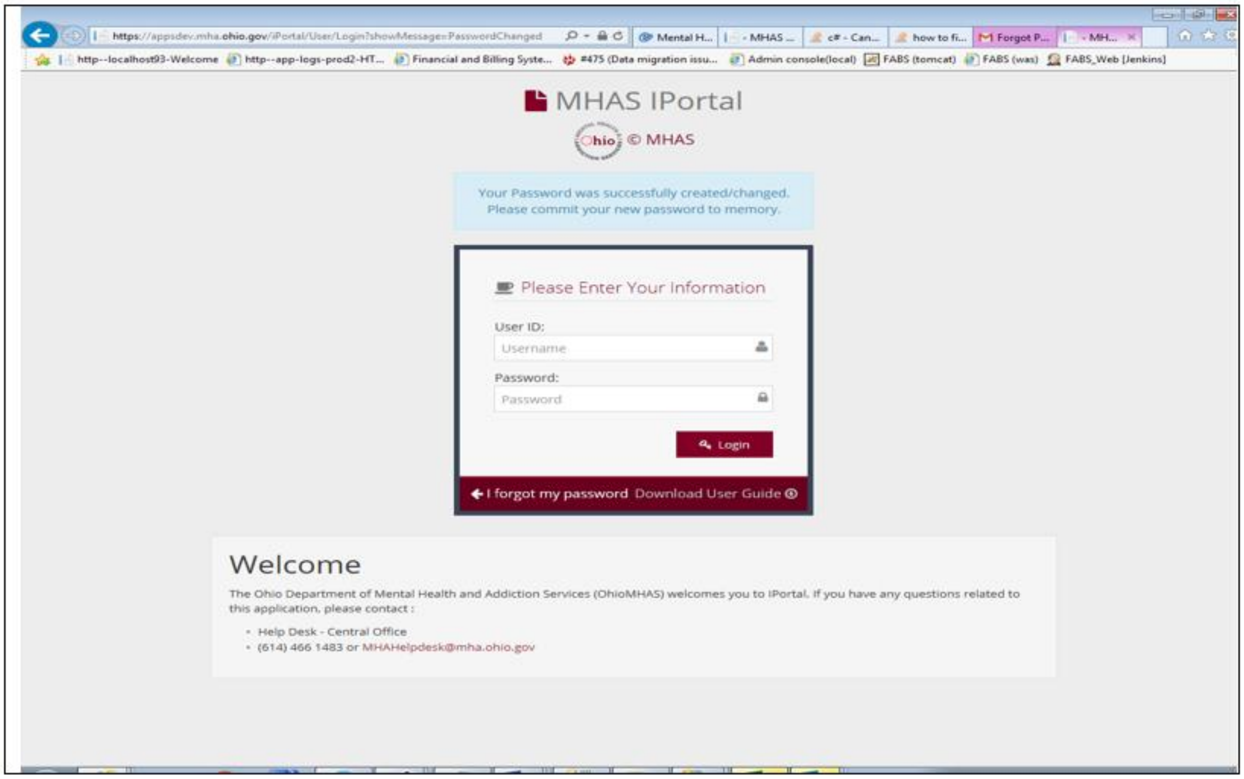
iv. **Click** on Update Password button. (Continue to Step 8)

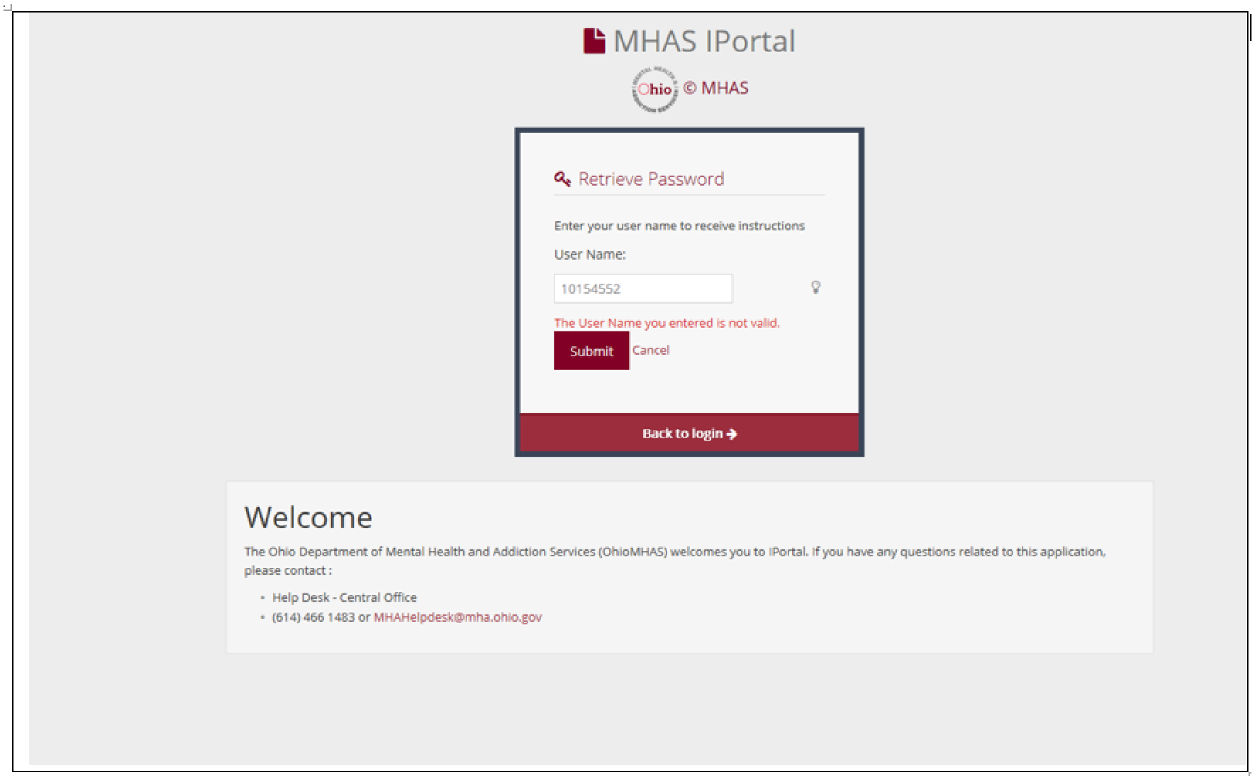


Step 5: Login With Your Updated Password:

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

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





Login to GFMS Application

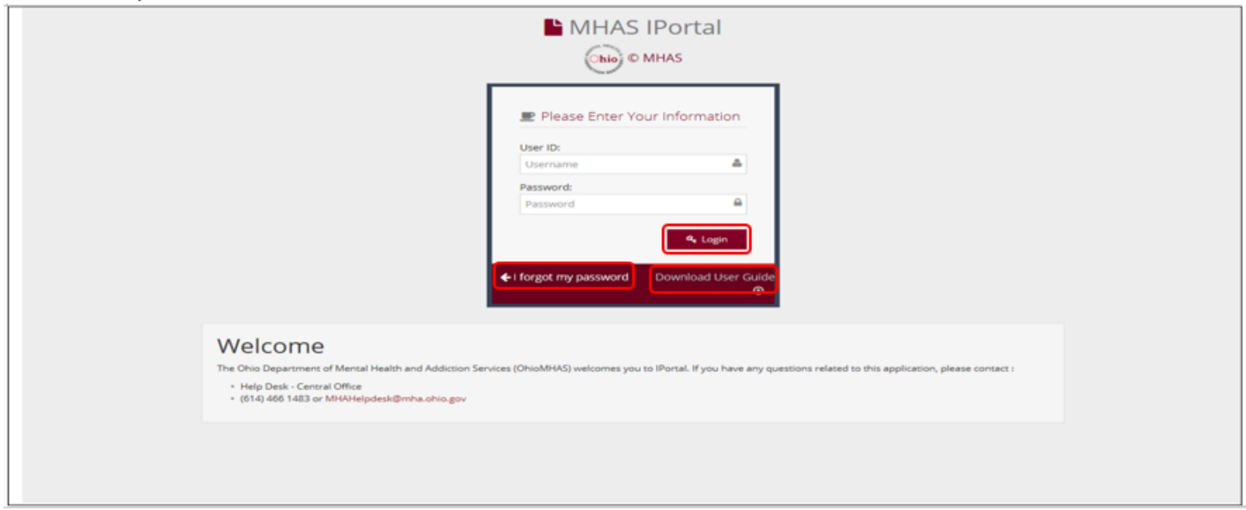
This section consist of 3 steps:

a. Navigate to I- Portal and login successfully
b. Display I-Portal Dashboard- Navigate to GFMS Application.
c. Display GFMS Dashboard

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.
2. You will be navigated to the "MHAS Portal" Login Screen, contains two links:
   a. I forgot my password:
   b. Download User Guide: If you want to download User Guide, **click** on this link and you can download IPortal user guide.
3. **Enter** your User ID and Password and **click** on Login button. Will be navigated to an IPortal Dashboard.



Download IPortal User Guide

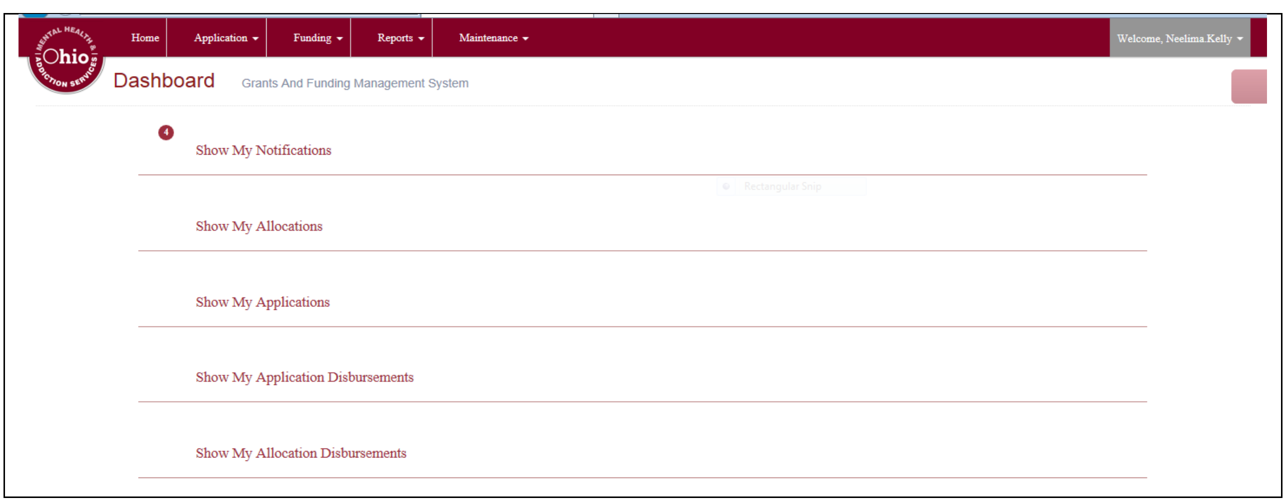
1. Open your browser and Go to (https://apps.mha.ohio.gov/iPortal)
2. Click on Download User Guide link, a pdf version of the IPortal user guide will be downloaded.

Step 2: Display MHAS IPortal Dashboard-Navigate to GFMS

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

II. Click on My Applications Tab displayed on I-Portal Dashboard and Select GFMS (Applicant) as displayed in the snapshot below:

Step 3: Display GFMS Dashboard



External User Navigations From GFMS Dashboard

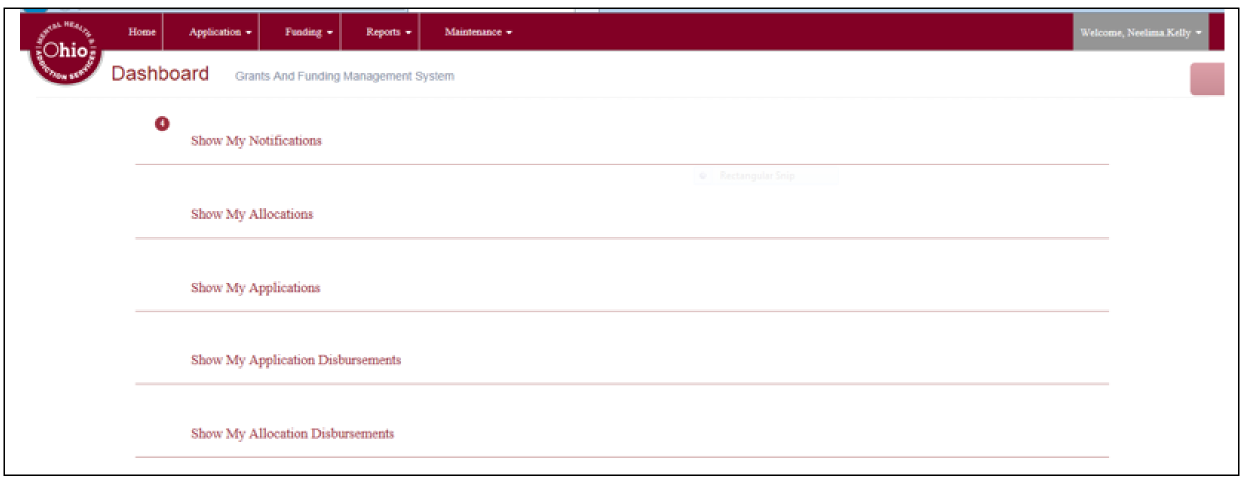
The External Users are following:

I. Applicant

Applicant Dashboard View and Navigations

The Applicant dashboard consist of following navigation paths:

1. OhioMHAS Logo
2. Home Tab
3. Application Tab
4. Funding Tab
5. Maintenance Tab
6. Report Tab
7. Show My Notifications
8. Show My Allocations
9. Show My Applications
10. Show My Application Disbursements
11. Show My Allocation Disbursements
12. My Account Information/ User Management/Logout
13. Gear Icon



OhioMHAS Logo

Clicking "Ohio MHAS Logo" will navigate the user to the GFMS dashboard.

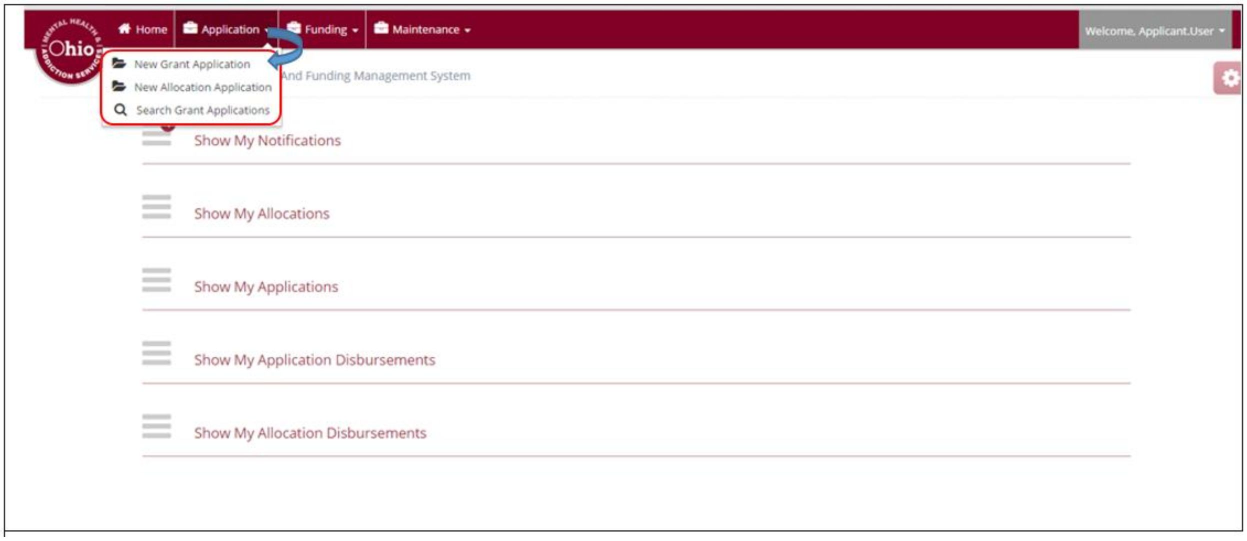
Home Tab

Clicking "Home" Tab will return the user to the GFMS dashboard.

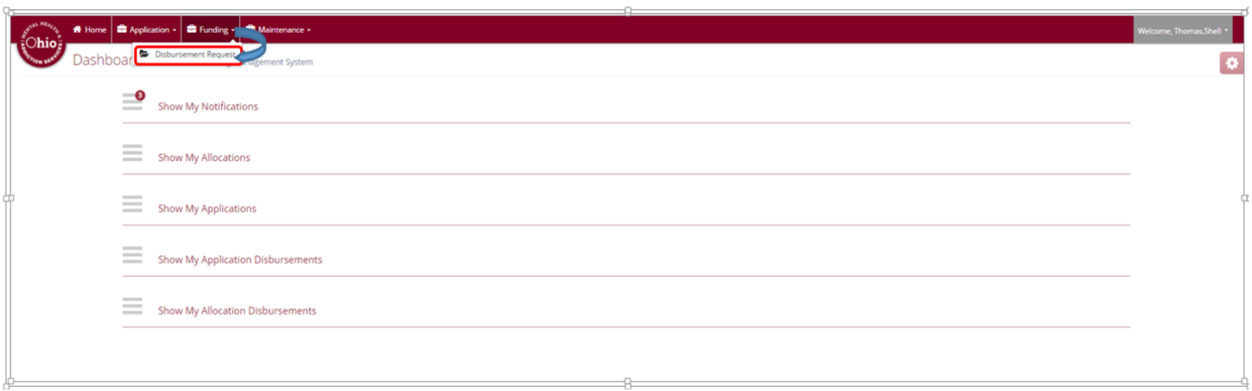
Application Tab

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.
- **Search Grant Application –** Click this link to search a grant application.

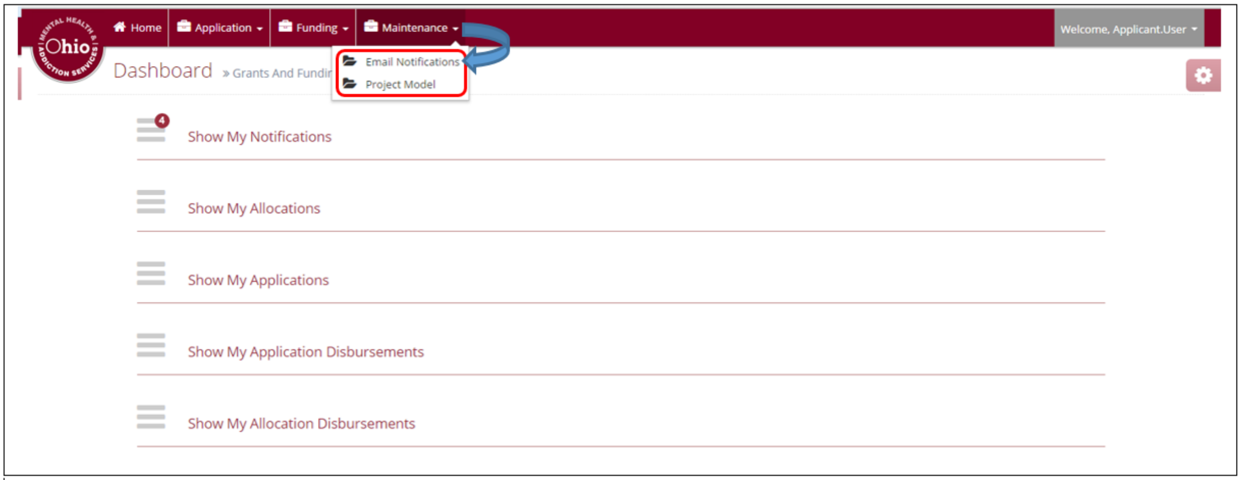


<u>Funding Tab</u>
The Funding tab provides an applicant to manage disbursement request. Click on funding tab as displayed in the snapshot below:



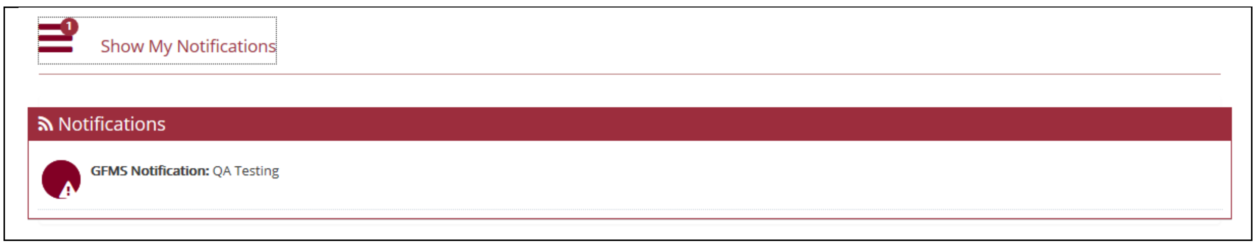
<u>Maintenance Tab</u>
The Maintenance tab provides an applicant the ability to manage data values and various controls that manifest on the grant application or other areas of the system.

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



Show My Notifications

I. 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:

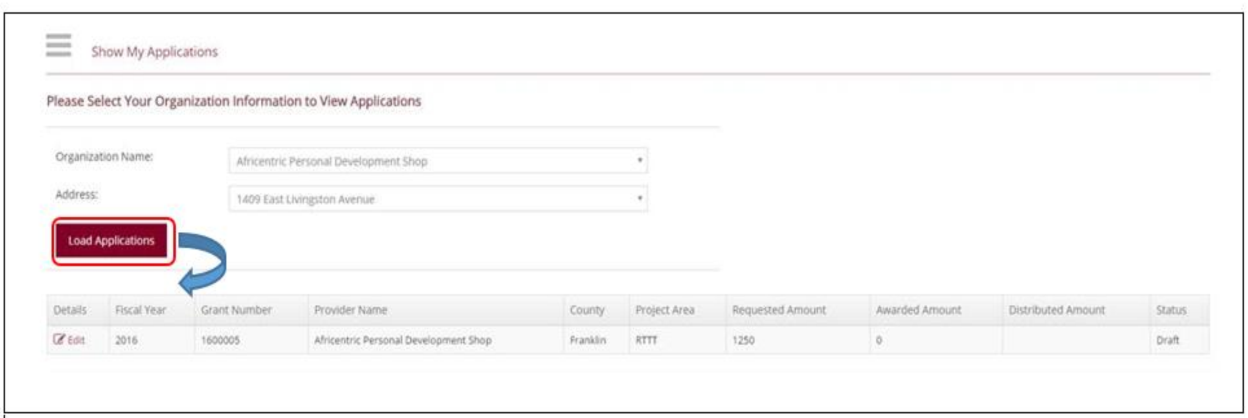


1. Notifications displayed on this page are **created** in the **IPortal** Application. The roles permitted to create notifications are I-Portal Admin, Application Admin, Project Lead and Fiscal Lead.

Show My Applications

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

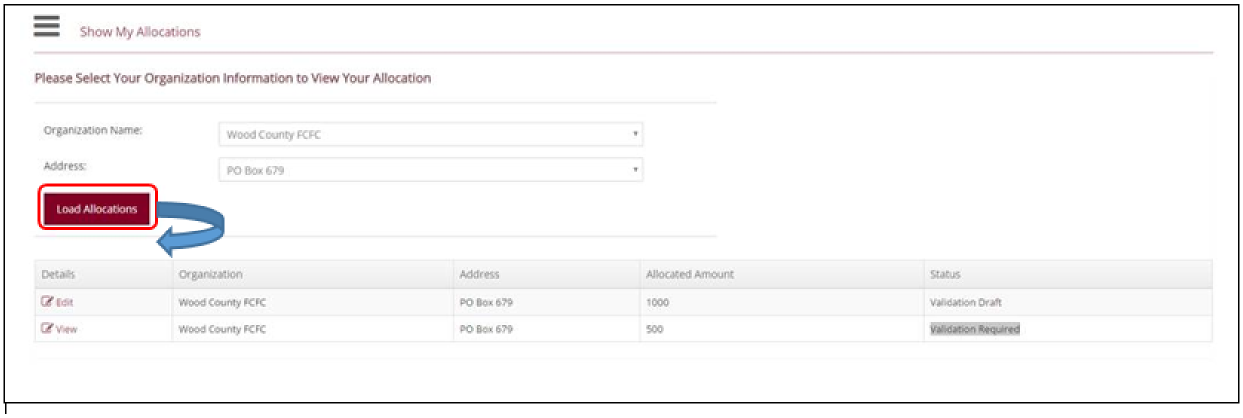
II. **Select** dropdown fields and **click** on Load Application button. You will then see applications captured in the table. An application will be editable or viewable depending upon its status.



Show My Allocations:

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

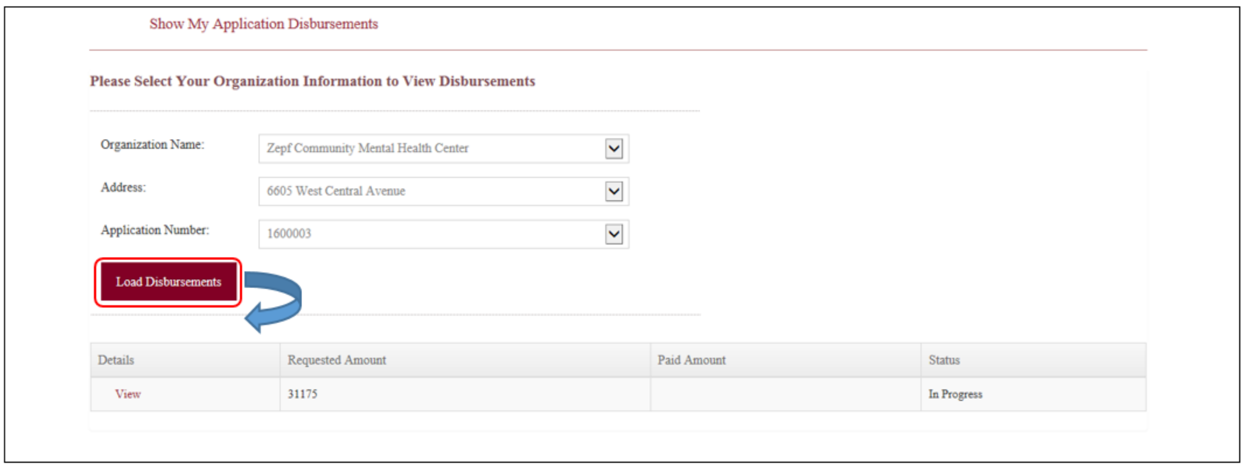
II. **Select** dropdown fields and **click** on Load Allocations button. You will then see allocations captured in the table. The application will be editable or viewable depending upon its status.



Show My Application Disbursements:

I. **Click** on this link, the 'Show My Application Disbursements' section will be displayed.

II. **Select** dropdown fields and **click** on Load Disbursements button. You will then see disbursement captured in the table. An application disbursement will be viewable.



Show My Allocation Disbursements:

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

II. **Select** dropdown fields and **click** on Load Disbursements button. You will then see disbursement captured in the table. An allocation disbursement will be viewable.

My Account Information/Logout

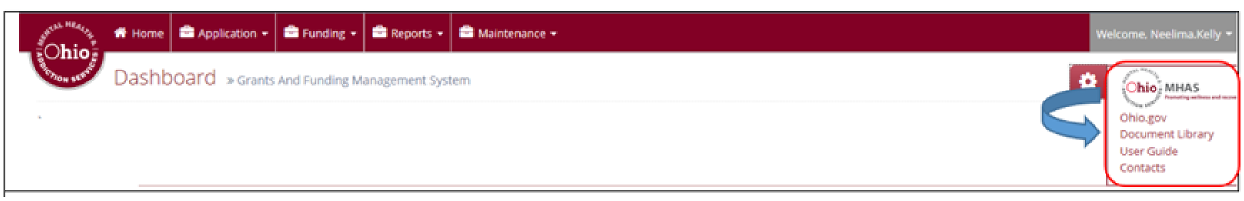
Clicking “Welcome, User Name” provides following option for the user:

- My Account- Clicking this link provide user the ability to manage account information.
- User Management – Clicking this link, navigate 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.

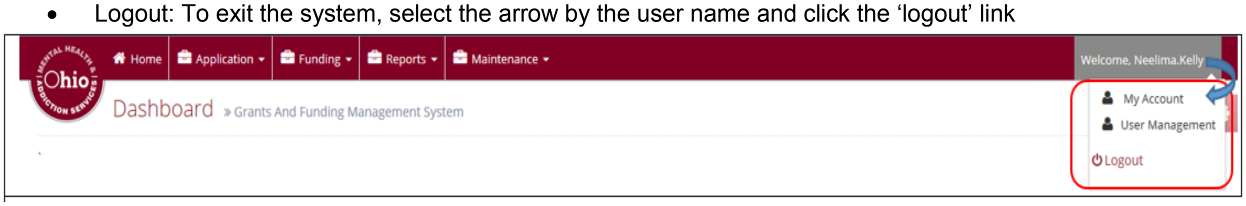
- **Ohio.gov** – Clicking on this link, navigate you to ohio.gov (Ohio government) information website.
- **Documentary Library**- Clicking on this link, navigate you to mha.ohio.gov website.
- **User Guide –** Clicking on this link, navigate you to GFMS User Guide (Not Available)
- **Contacts-** Clicking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



My Account Information/Logout

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

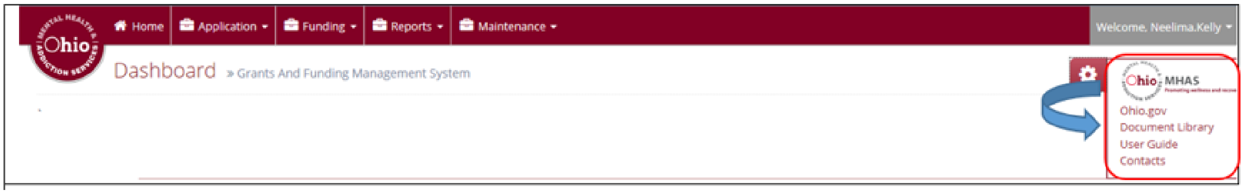
- My Account- Clicking this link provide user the ability to manage account information.
- User Management – Clicking this link, navigate user to the I-Portal Dashboard.
- Logout: To exit the system, select the arrow by the user name and click the ‘logout’ link



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

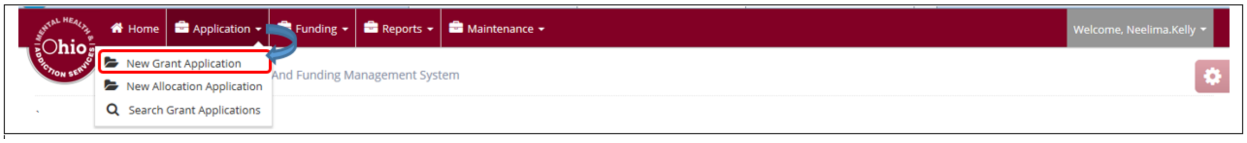


Application Tab

This section covers the use of features related to New Grant Application, New Allocation Application and Search Grant Applications.

New Grant Application

An Applicant is provisioned to access the MHAS Grant and Funding Management System to start (create) an application for a grant. An Applicant logs into the I Portal and has the option to select GFMS to apply for a grant. Under the "Application" tab, **selects** the "New Grant Application" option as displayed in the snapshot below:

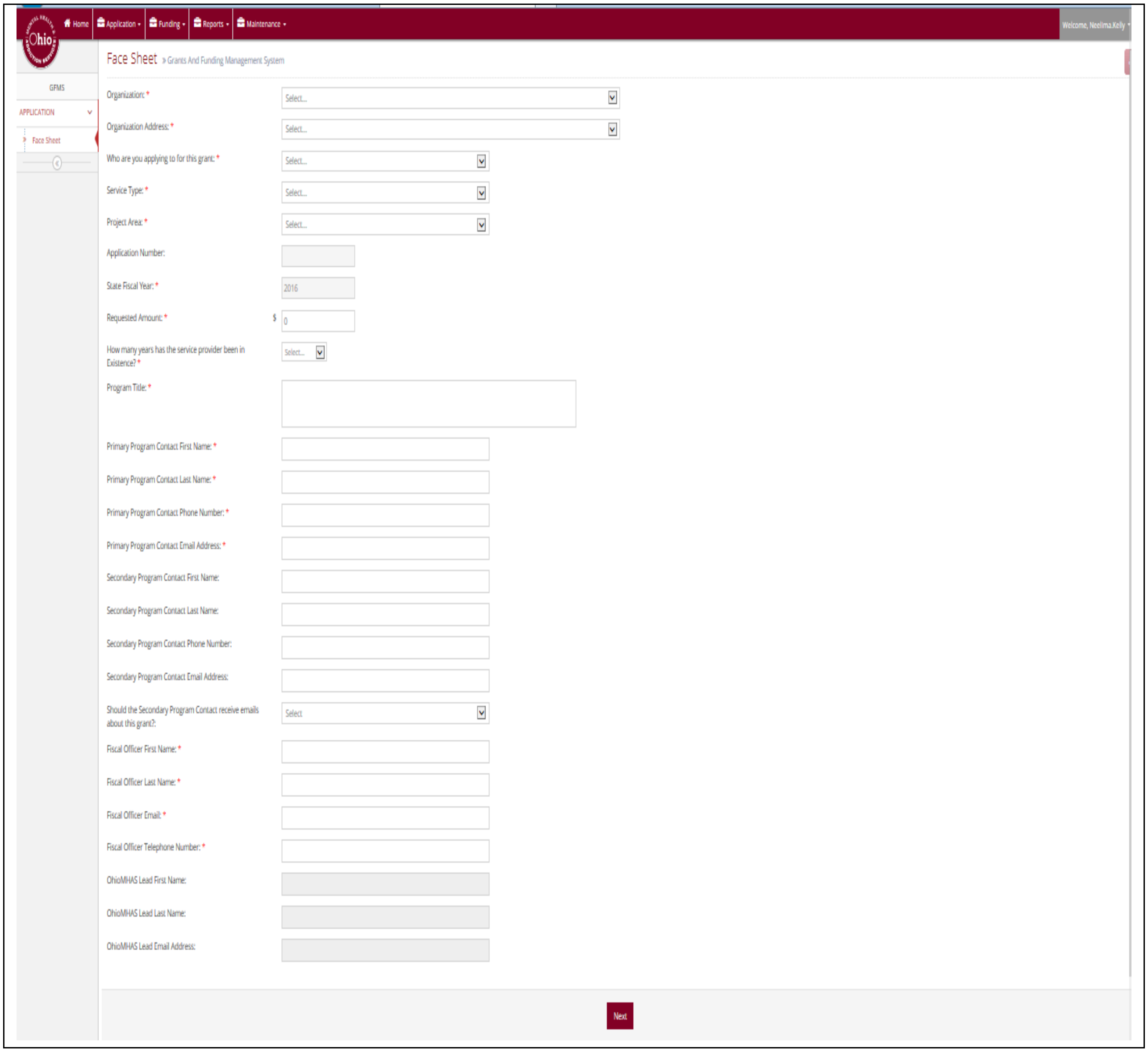


Face Sheet

You are on the first page, "Face Sheet" of the grant application. This page provides the initial information for the grant application.

The Face Sheet provides the initial information for the grant application.

1. **Enter** the information as indicated per each field.
2. Fields with red asterisks * are required fields.
3. Some fields are grayed out and the system will pull in information from other areas. These fields are read only and cannot be edited.
4. After all of the required information has been added, **select** the Next button (Data saved successfully) to be taken to the next screen.



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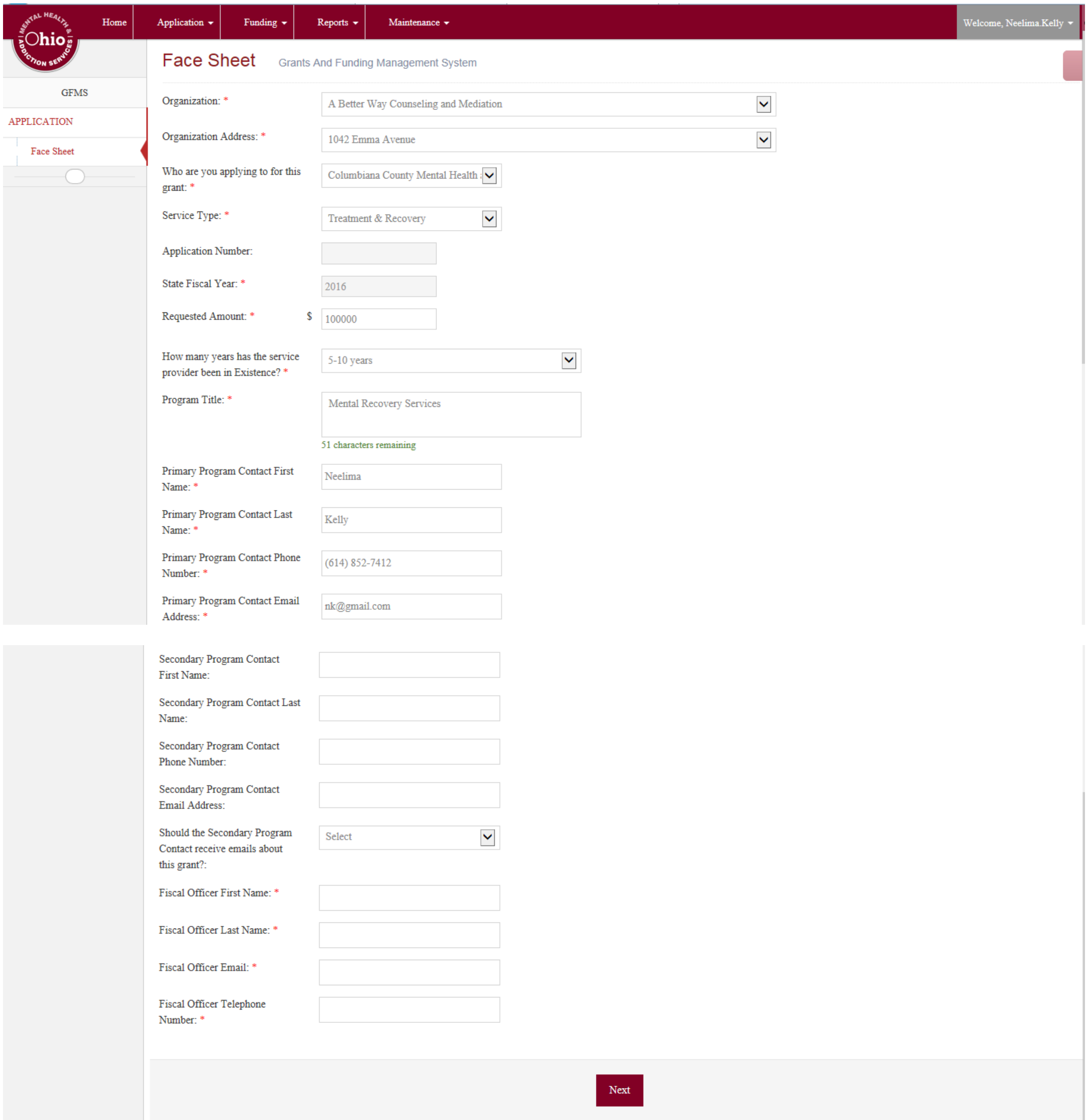
1. Organizations needs to be added to the applicant role in IPortal, to view under the organization dropdown on face sheet.

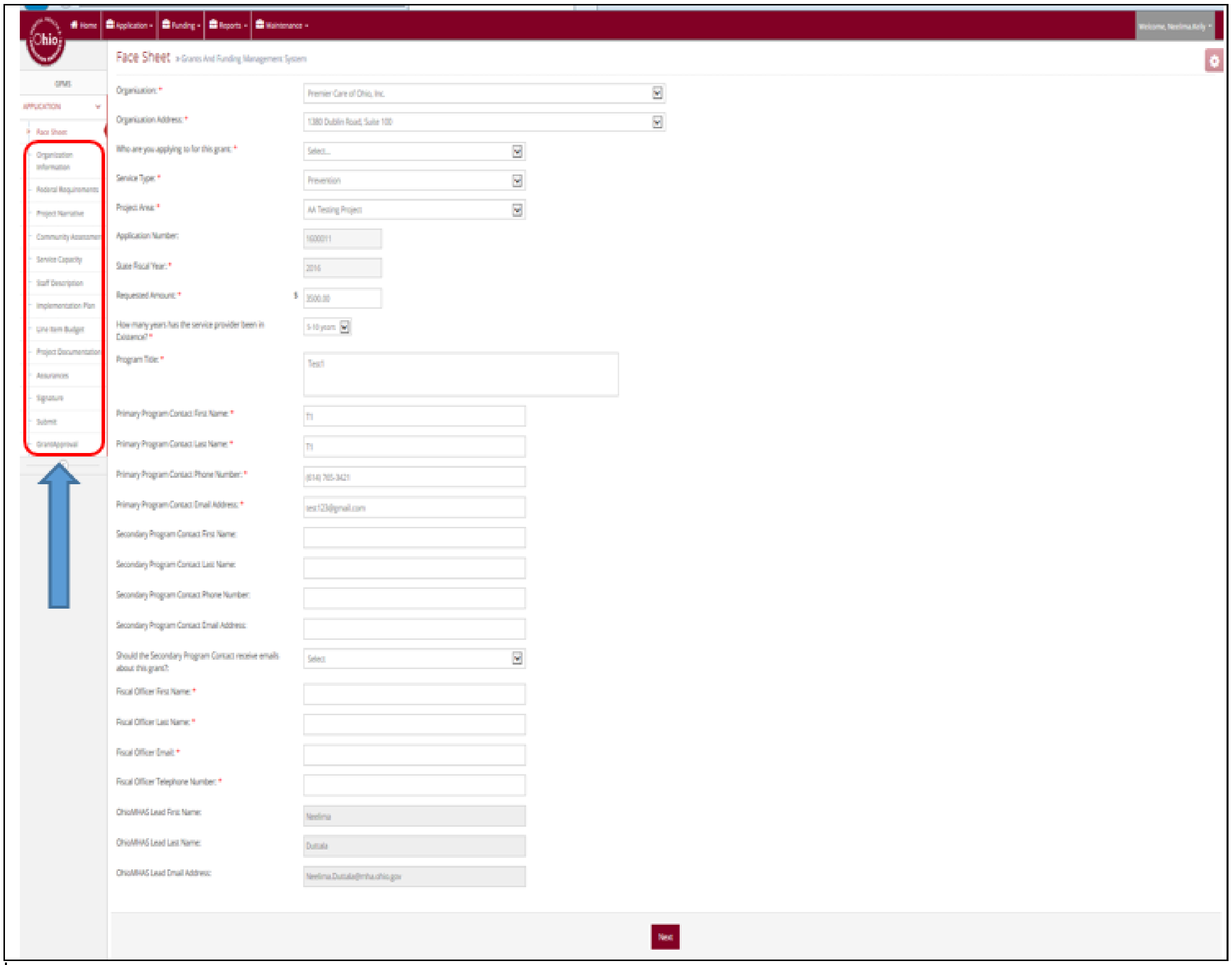
When an Applicant (Provider) selects Board for “Who are you applying for this grant” field. The following fields will be disappeared from the face sheet:

- Project Area dropdown
- OhioMHAS Lead First Name
- OhioMHAS Lead Last Name
- OhioMHAS Lead Email Address

Kindly view the snapshot below:



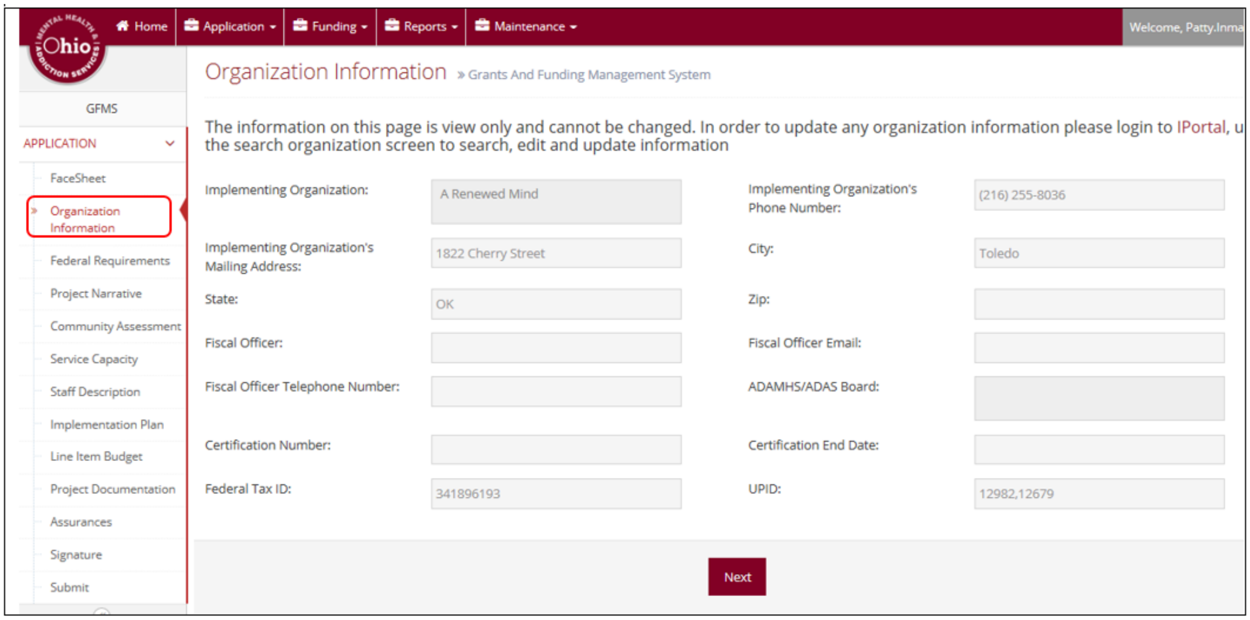
5. Once the Face Sheet has been completed and saved, the Navigation bar on the left of the screen will appear displaying the remaining pages to be completed as displayed in the snapshot below:



**For Board, the user will not view assurance and signature pages on the left navigation bar.*

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.

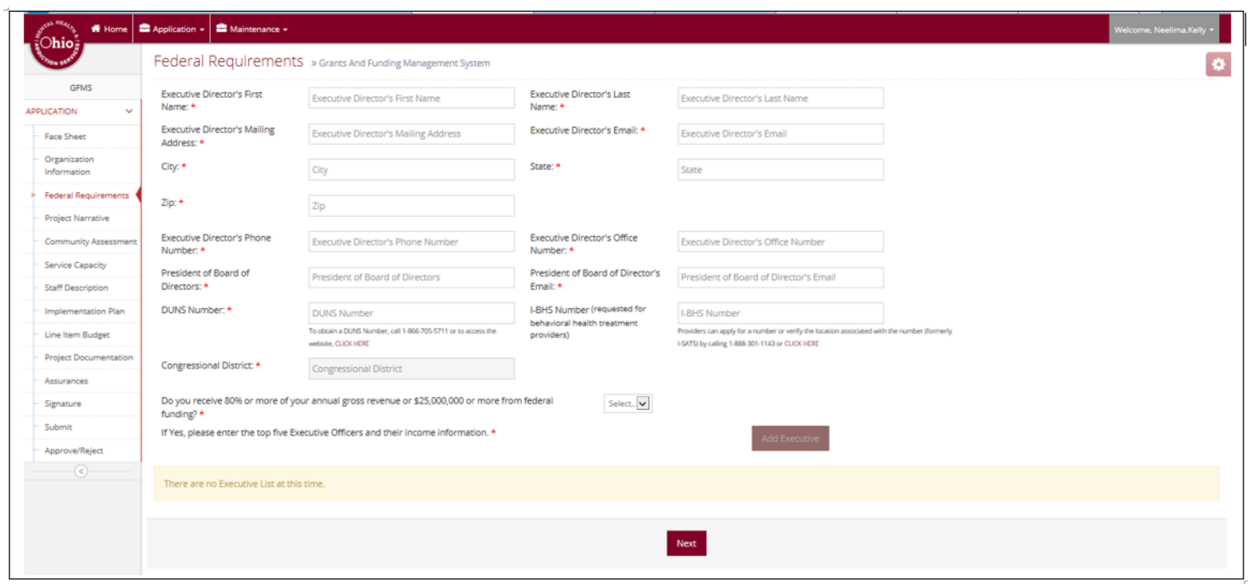


1. The information on this page is **view only** and cannot be changed. In order to **update** the information on this page, an Application Admin will need to make the update via the **IPortal** registration screen. Certification information must be updated through Licensure & Certification.

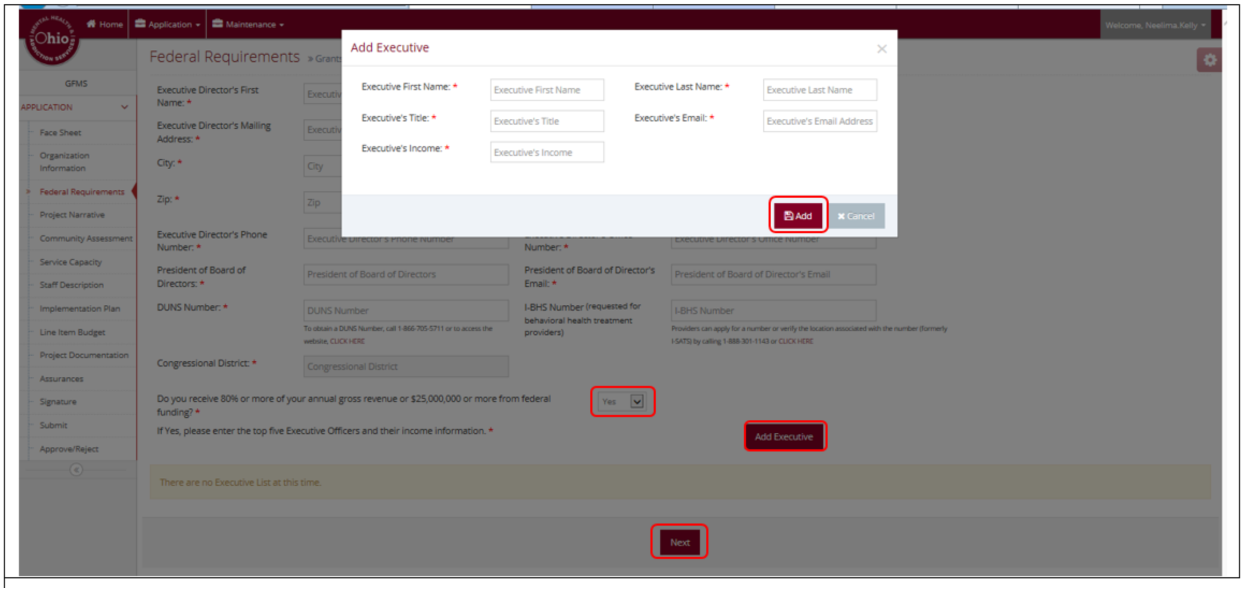
Federal Requirements

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

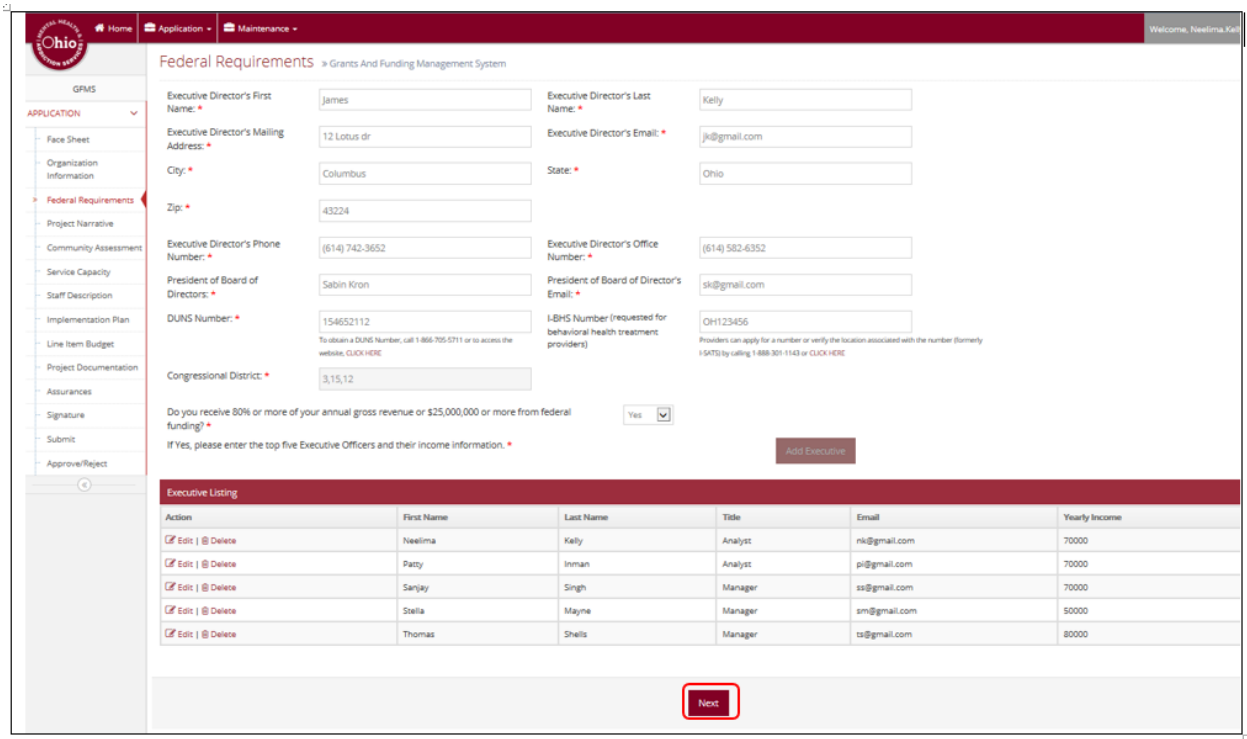
1. **Select** and **Enter** the information as indicated per each field on "Federal Requirement" screen.
2. Fields with red asterisks * are required fields.



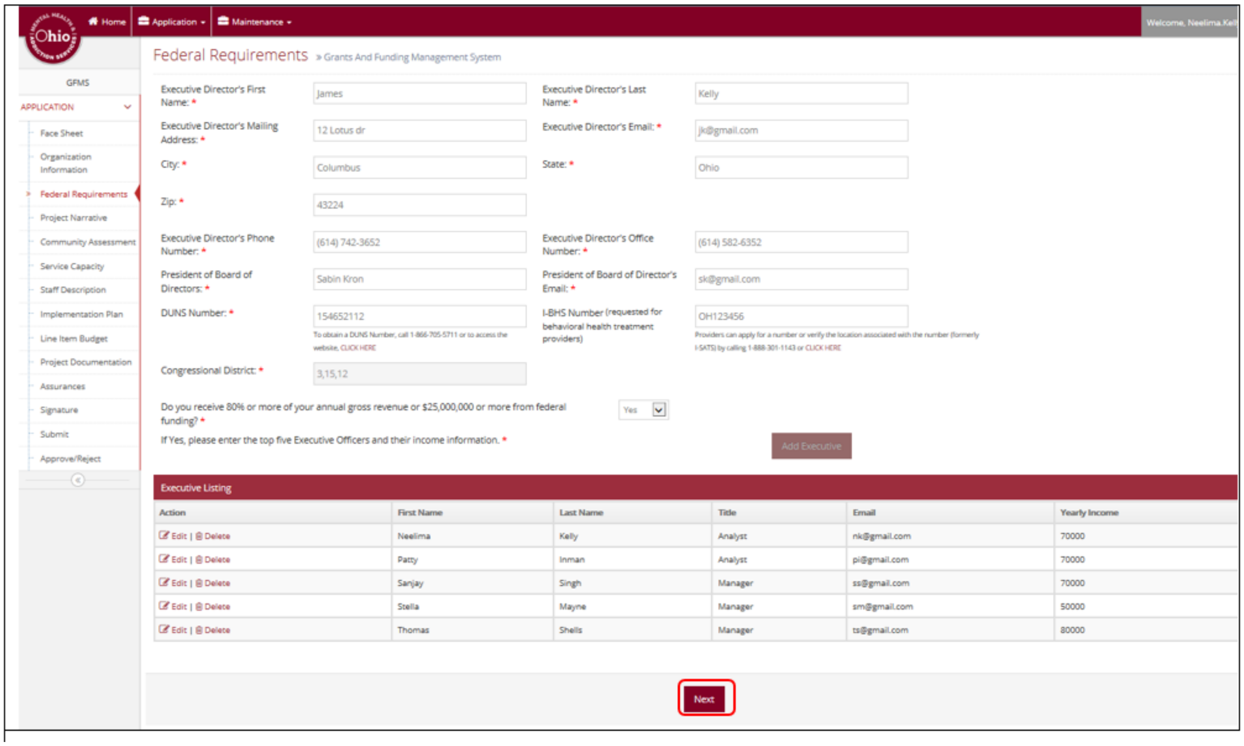
3. To add Executives Director, **select** the Add Executive button.



4. 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.
5. After all of the required information has been added, **select** the Next (Data is saved) button to be taken to the next screen.



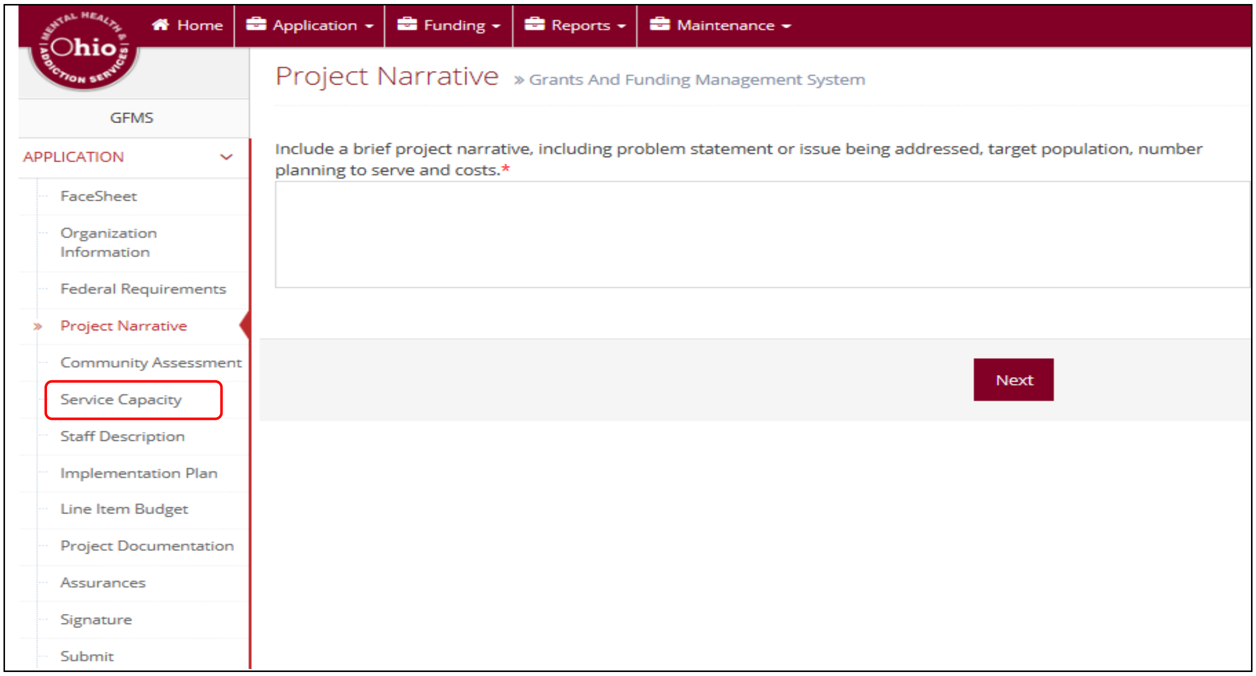
6. After all of the required information has been added , select the Next (Data is saved) button to be taken to the next screen.



Project Narrative

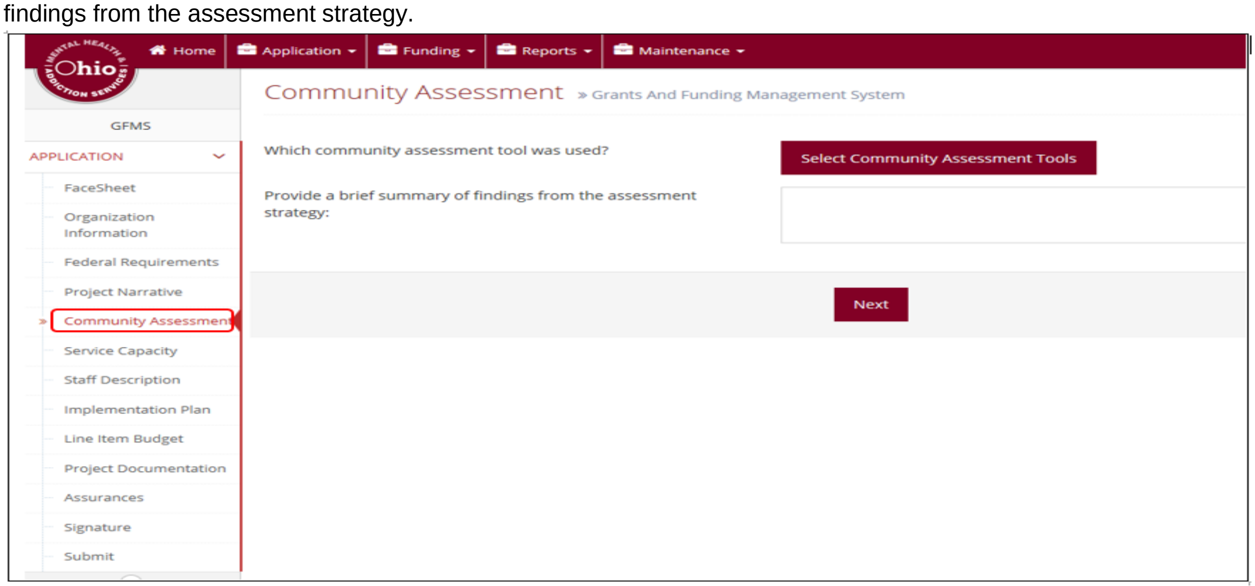
The Project Narrative page provides more detailed information about the project.

1. **Enter** the information as indicated assuring that you have addressed all of the requested information.
2. As the narrative is being entered into the text area, the character counter will assist in keeping track of the space available for the narrative.
3. Fields with red asterisks * are required fields.
4. After all of the required information has been added, select the Next button (Data is saved) to be taken to the next screen.

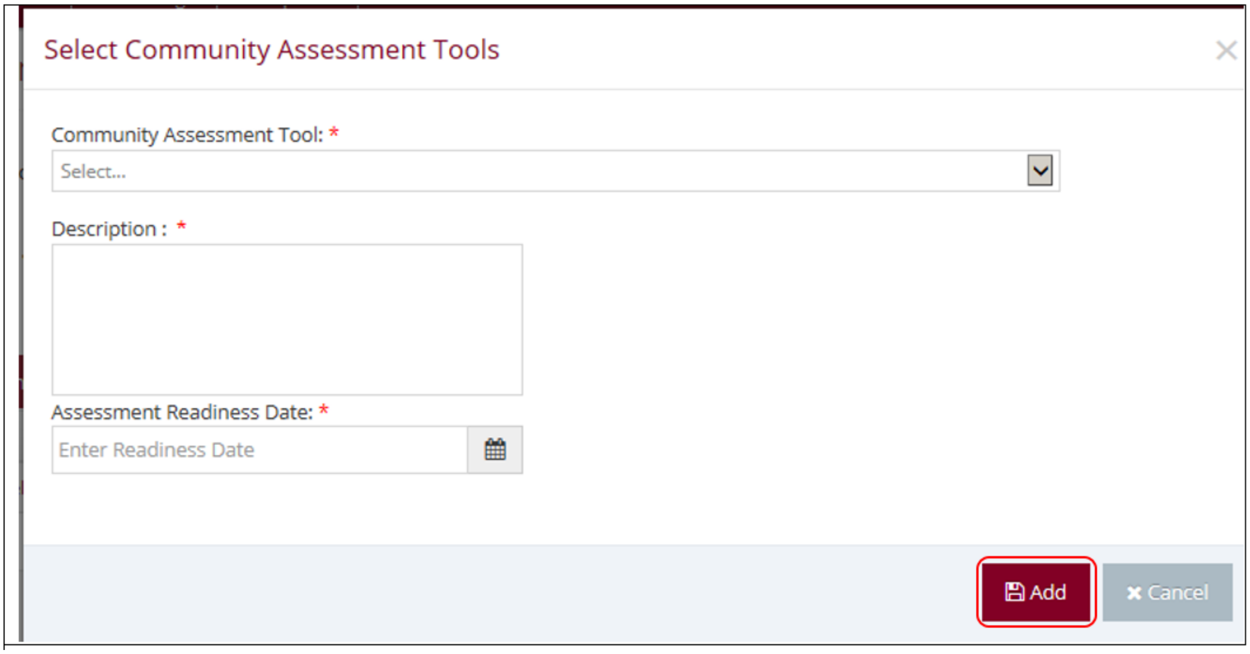


Community Assessment

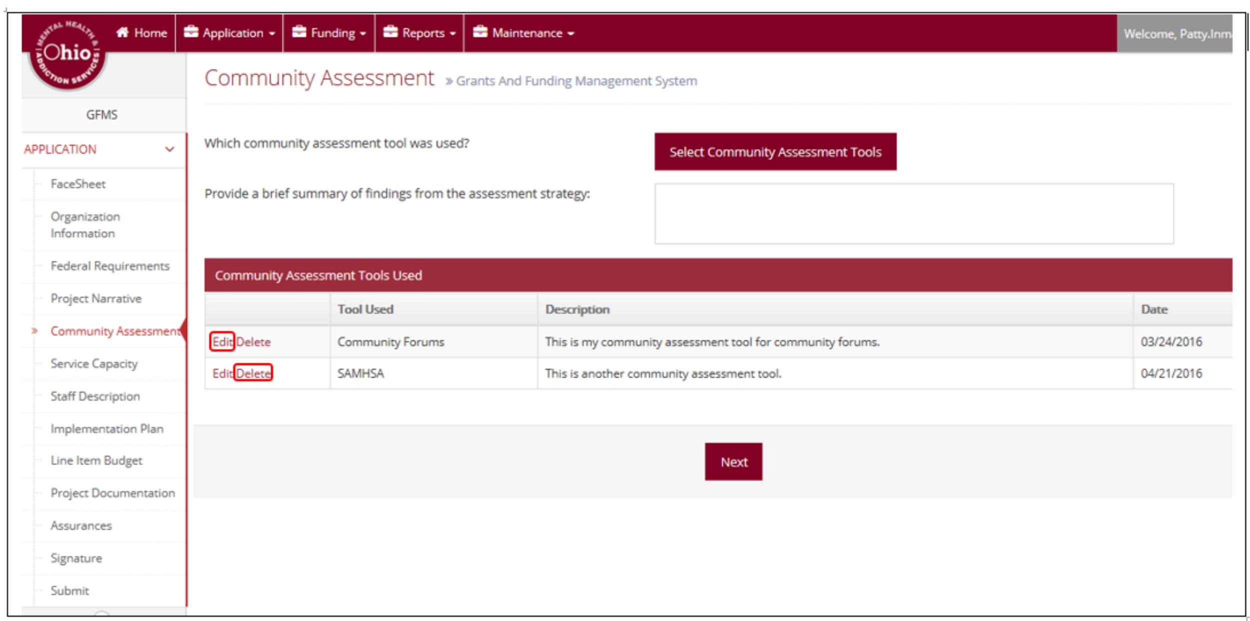
The Community Assessment Page captures which assessment tool(s) were used and provide a brief summary of findings from the assessment strategy.



1. To add the community assessment tools, select the <u>Select Community Assessment Tools</u> button.
2. A pop-up window will appear titled; 'Select Community Assessment Tools'.
3. **Choose** Your Community Assessment tool form the drop down.
4. Enter the information as indicated per each field and select the <u>Add</u> button. Repeat until all of the community assessment tools have been added.



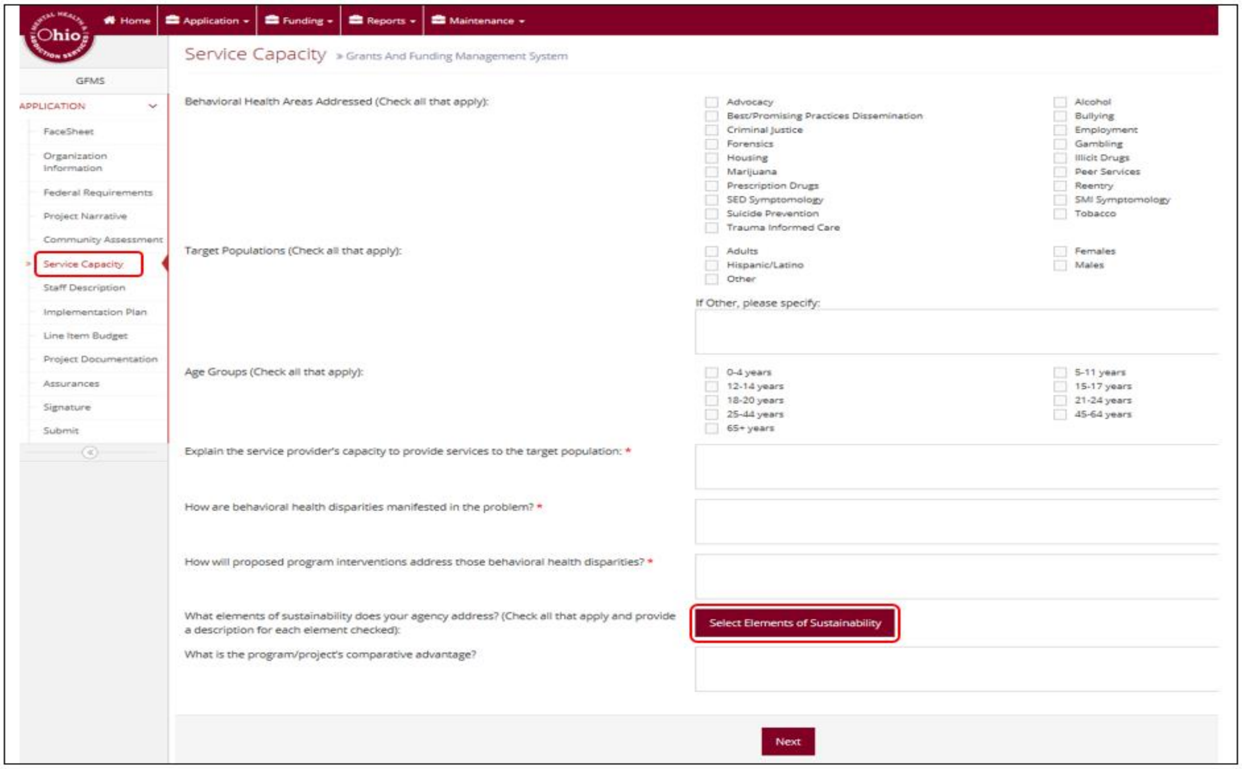
5. **Enter** the information as indicated per each field and **select** the Add button. Repeat until all of the community assessment tools have been added.
6. All community assessment tools that are added will appear on the ‘Community Assessment’ screen in the table titled Community Assessment Tools Used.
7. The entries in the “Community Assessment Tools Used” table, may be edited or deleted by clicking on the Edit or Delete link.
8. To move to the next screen select the Next button (Data is saved).



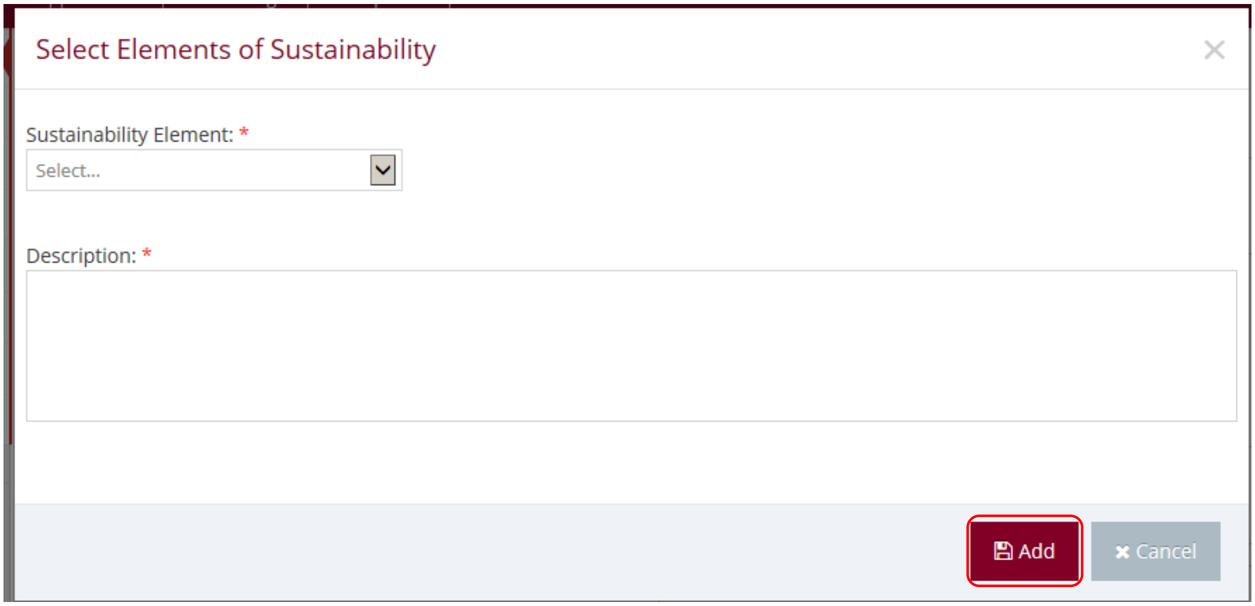
Service Capacity

The Service Capacity screen addresses some demographics, elements of sustainability and behavioral health disparities.

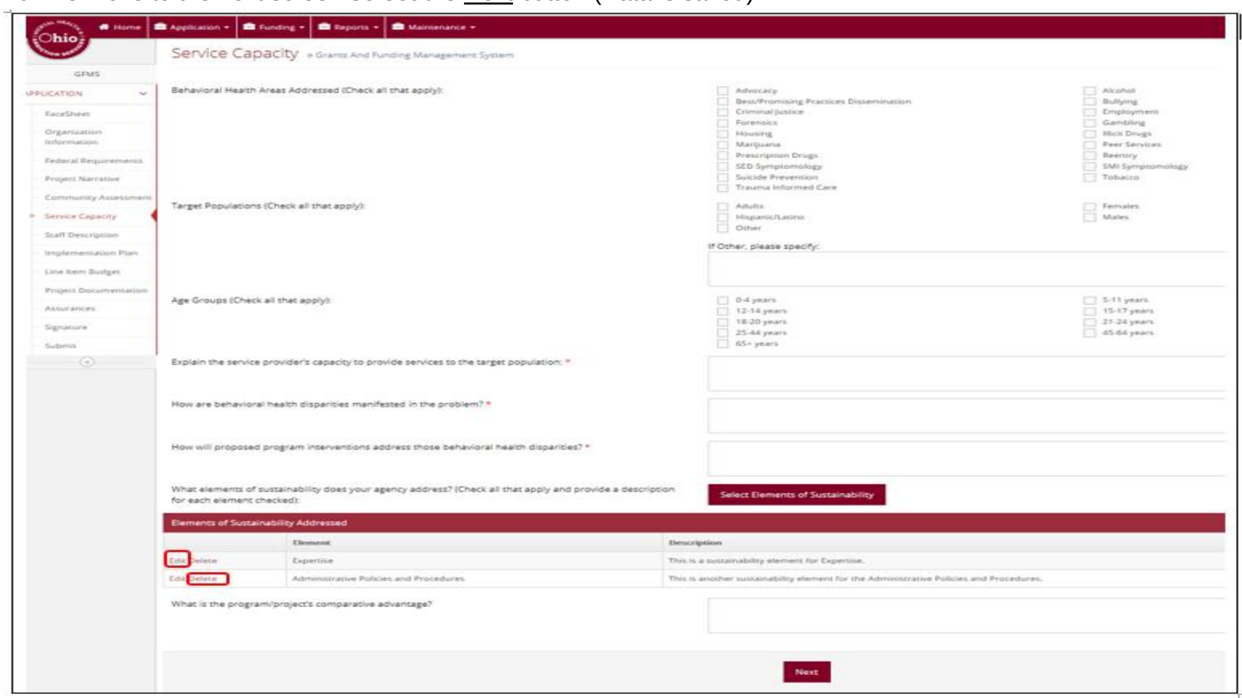
1. **Select** and **Enter** the information as indicated per each field displayed on the "Service Capacity" screen.
2. Fields with red asterisks * are required fields.
3. As the narratives are being entered into the text areas, the character counter will assist in keeping track of the space available for the narrative.
4. To add the elements of sustainability, **select** the Select Elements of Sustainability button as highlighted below in the snapshot:



5. A pop-up window will appear titled; 'Select Elements of Sustainability''.
6. **Choose** the elements of sustainability and complete the description.
7. **Enter** the information as indicated per each field and select the Add button. Repeat until all of the sustainability elements have been added.



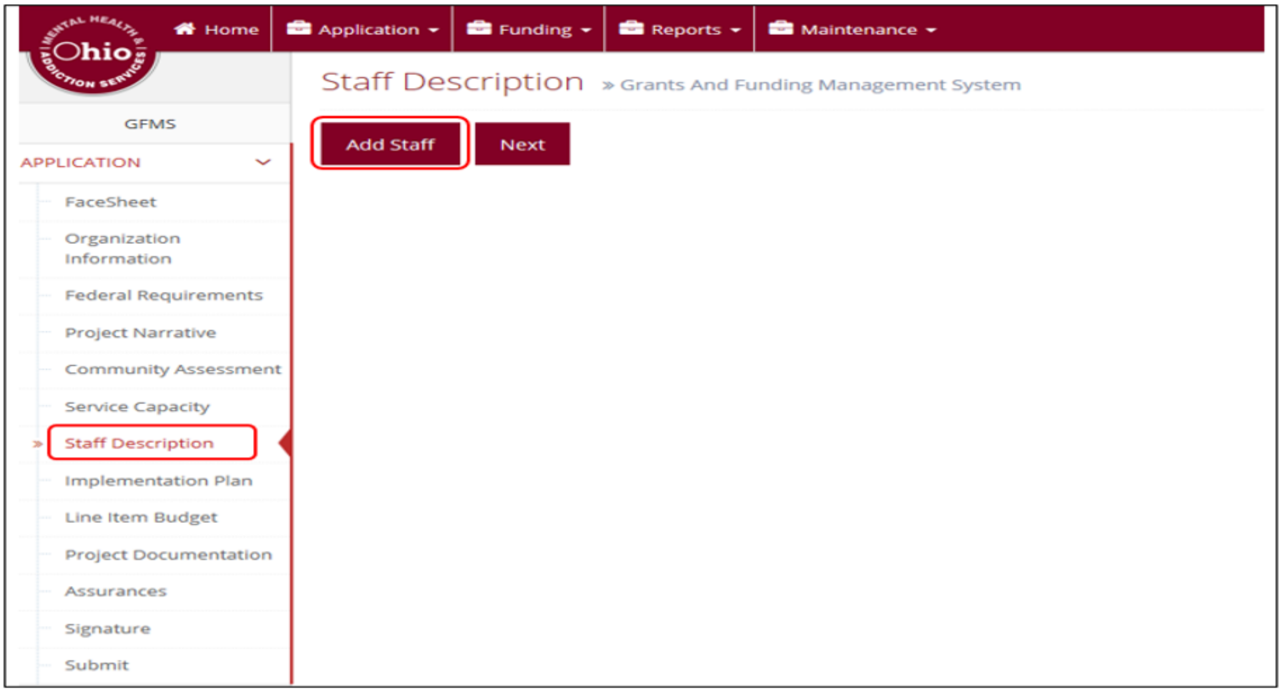
8. All sustainability elements that are added will appear on the “Service Capacity” screen in the table titled “Elements of Sustainability Addressed”.
9. The entries in the “Elements of Sustainability Addressed” table, may be edited_or deleted by clicking on the <u>Edit</u> or <u>Delete</u> link.
10. To move to the next screen **select** the <u>Next</u> button (Data is saved).



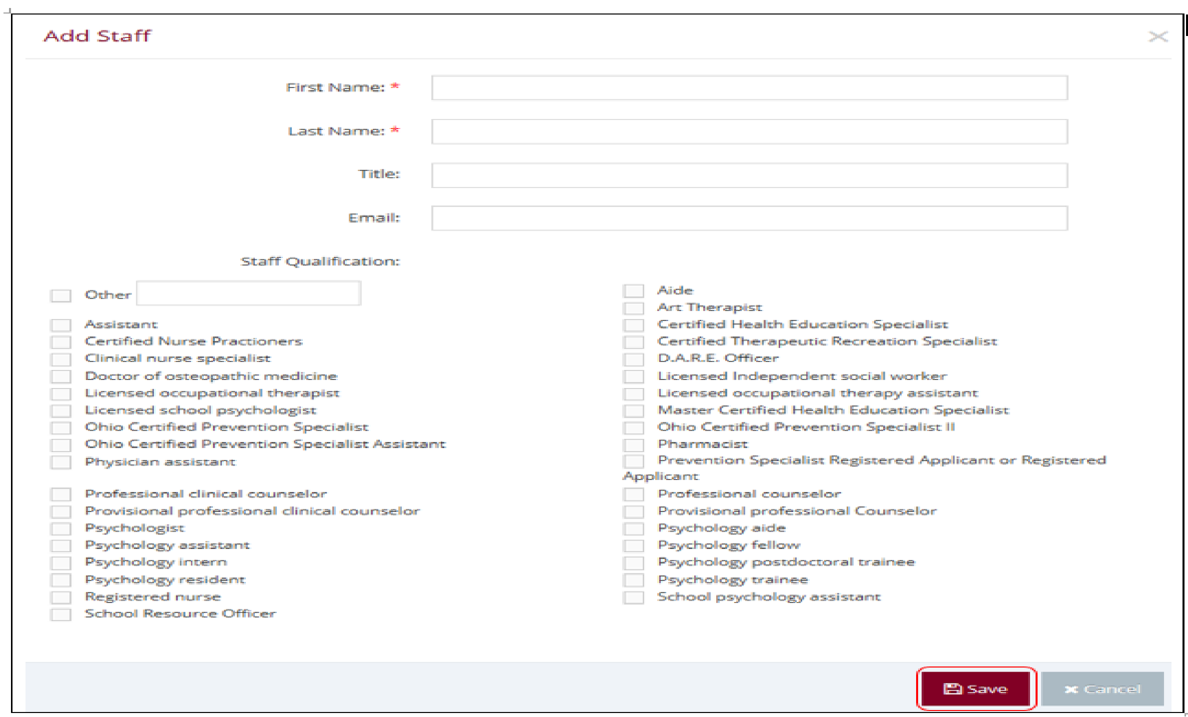
<u>Staff Description</u>

The Staff Description screen will display a listing of the staff and their qualifications.

1. To add staff, **select** the <u>Add Staff</u> button as highlighted below in the snapshot.



2. An 'Add' Staff' pop-up window will appear.
3. Fields with red asterisks * are required fields.
4. **Enter** the information as indicated per each field and **select** the Save button. Repeat until all of the staff and credentials have been added. If you change your mind, select the Cancel button, navigated back to staff description screen.

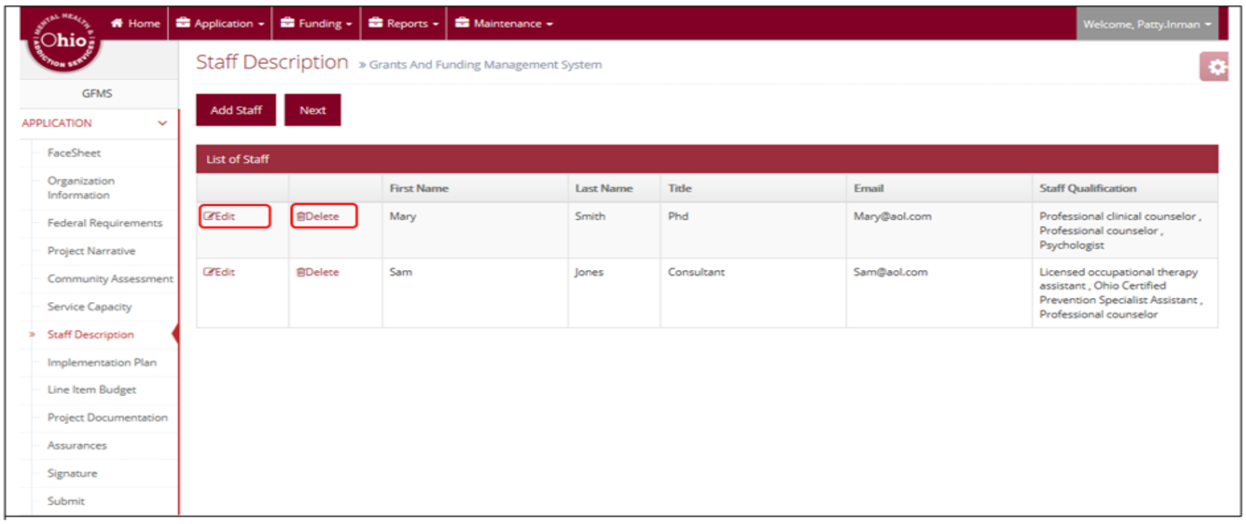


The Staff Qualifications that are listed in the 'Add Staff' pop-up window are **dependent** on the Service Type of the application. For example; Prevention may not see the same qualifications that are shown for Community Support.

Only Staff working on the **particular grant** will be **included** in the "List of Staff" not the entire staff list for the agency.

If user **selects** "Other" displayed under Staff Qualifications list, the text box field becomes the **required** field and user needs to **enter** the value in it.

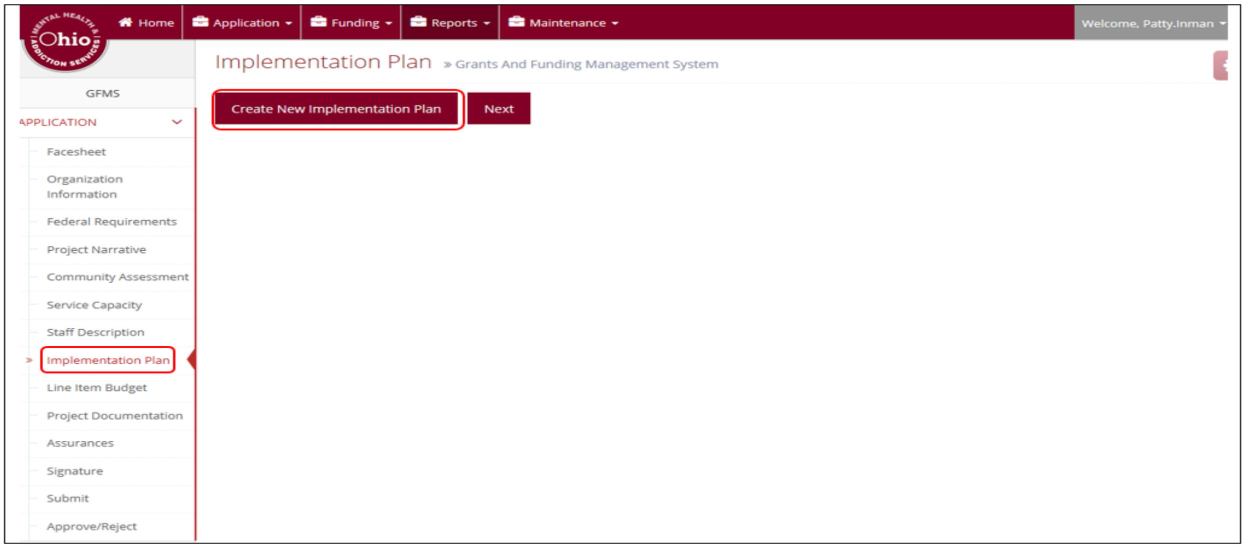
5. All staff that are added will appear on the "Staff Description" screen in the table titled "List of Staff".
6. The entries in the "List of Staff" table, may be edited or deleted by clicking on the <u>Edit</u> or <u>Delete</u> link.
7. To move to the next screen **select** the <u>Next</u> button (Data is saved).



Implementation Plan

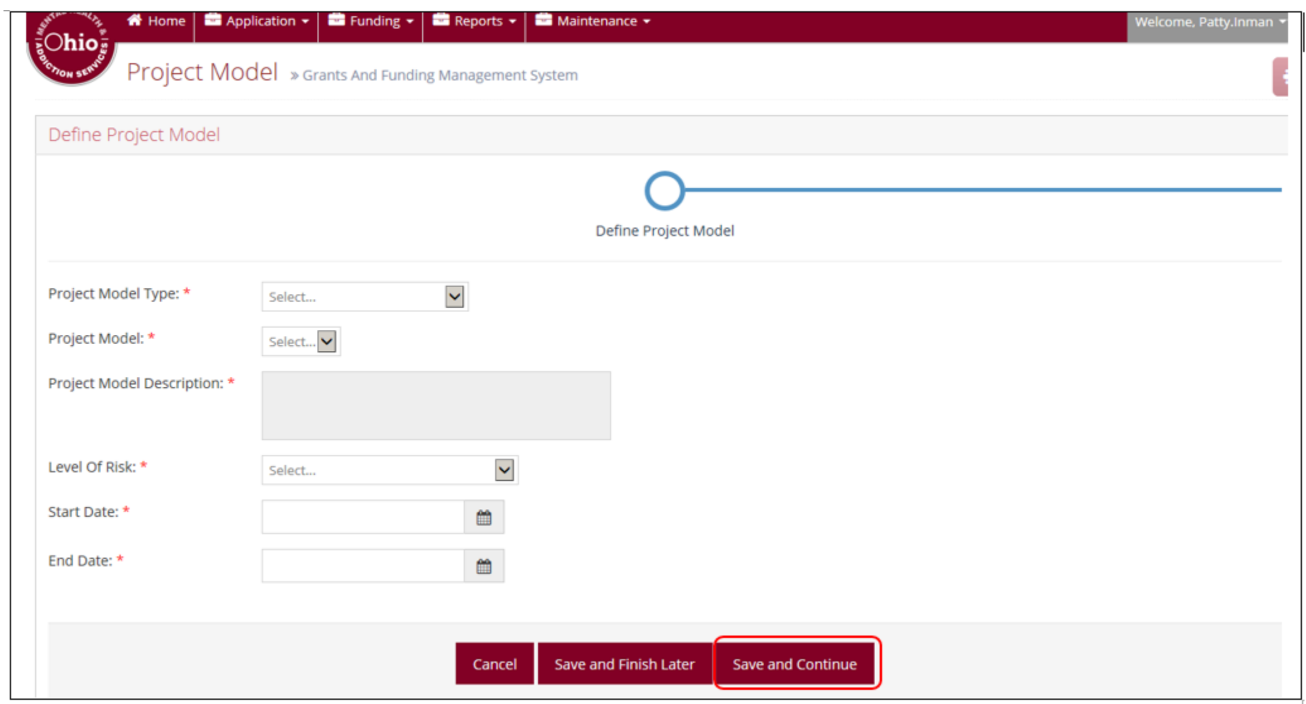
The Implementation Plan is made up of several screens. The plan is where the Applicant will describe how they intend to implement and manage the project outlined in this application.

1. To create the Implementation Plan, select the <u>Create New Implementation Plan</u> button as displayed in the snapshot below:



Define Project Model

1. The ‘Define Project Model’ screen will appear.
2. Fields with red asterisks * are required fields.
3. **Select** and **Enter** the information as indicated per each field. Depending on what is selected in the “Project Model” dropdown, the description will be automatically populate into the ‘Project Model Description’ field.
4. **Select** the Save and Continue button. Repeat until all of the staff and credentials have been added.

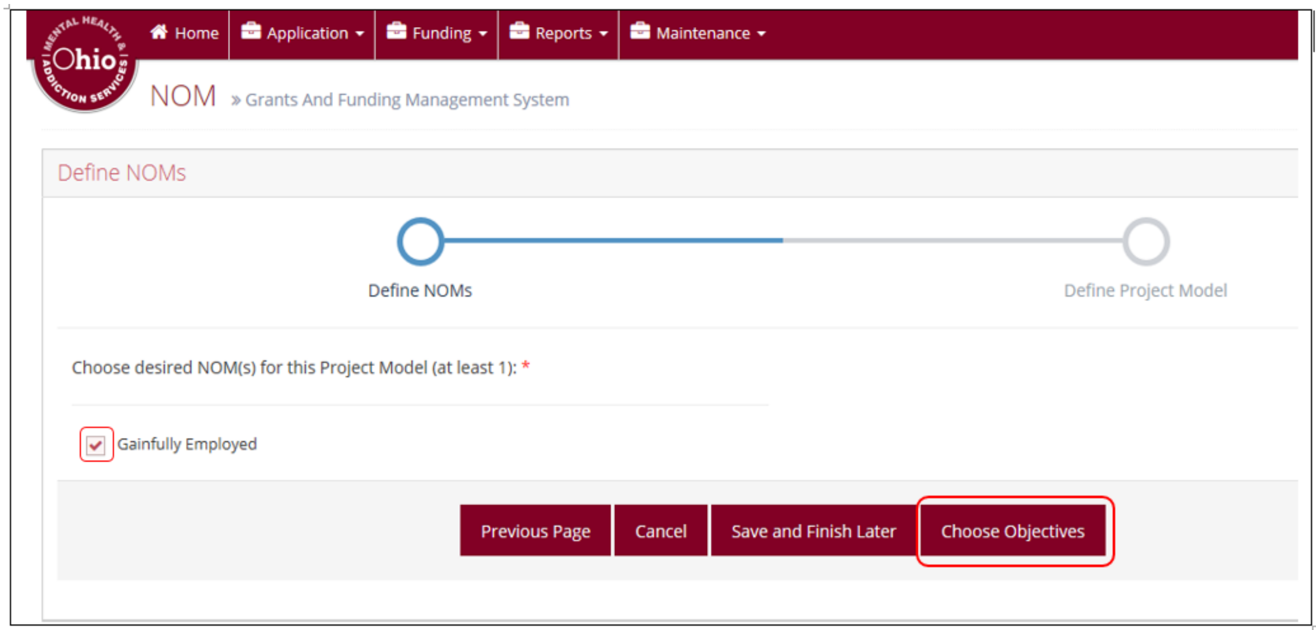


1. The Project Model Type, Project Model and Project Model Description must have been **created** by the OhioMHAS Lead in the **Project Model section** of the **Maintenance Tab.**

2. If user **selects** Adaptive **Evidence Based Programs or Locally Developed Programs** under Project Model Type, the project model description **needs** to be entered.

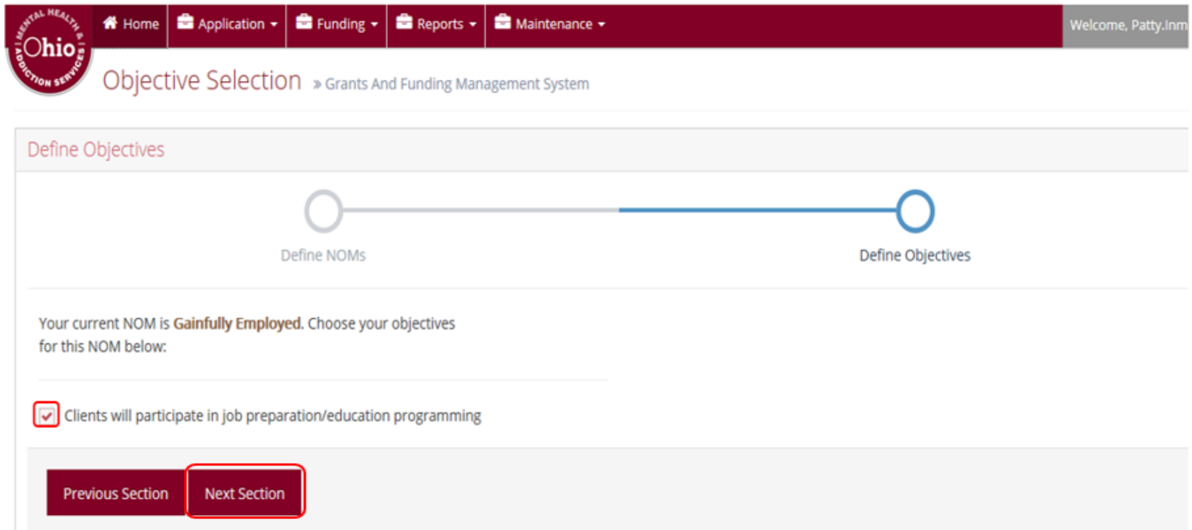
Define NOMs

1. All of the NOMs associated with the selected Project Model will automatically show on the screen.
2. **Select** at least one NOM and then **select** the Choose Objectives button as highlighted below in the snapshot:

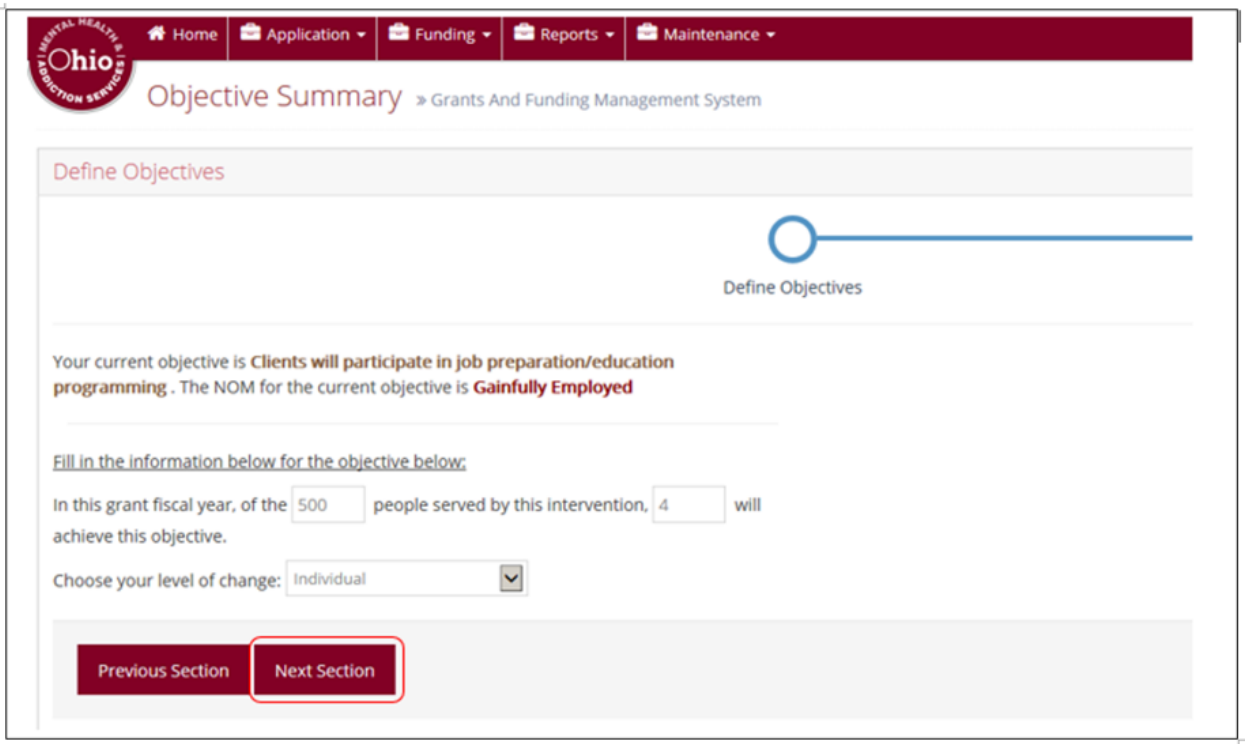


Define Objectives

1. All of the Objectives associated with the selected NOMs will automatically show on the "Define Objectives" screen.
2. **Select** at least one Objective and then select the Next Section button. Data is saved.



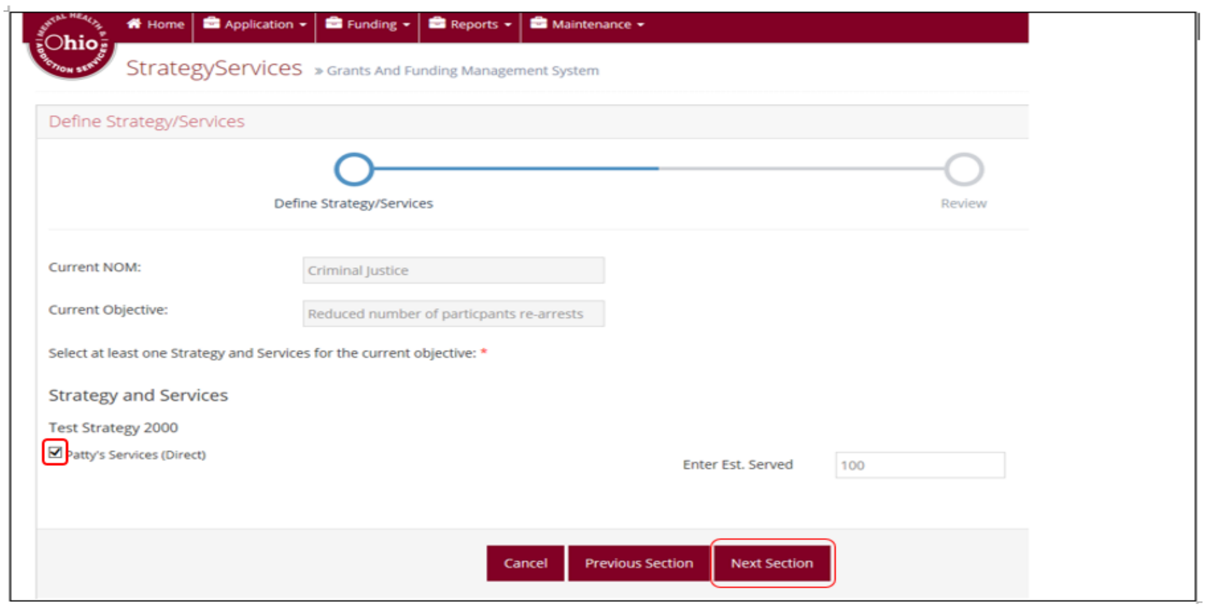
3. A second "Define Objectives" screen will appear.
4. **Select** and **Enter** the information as indicated per each field and select the <u>Next Section</u> button.



1. **Depending** on the **Service Type** of the application, the user will view screens for **Strategy/Services, Service/Activities**, or will have completed the Implementation Plan section of the application.
2. If Service Type is **"Prevention" or "Community Support",** the "**Strategy/Services"** screen will be **displayed.**
3. If Service Type is **"Treatment and Recovery", "Services/ Activities"** screen will be **displayed.**
4. If Service Type is **"Research and Evaluation",** Services/ Activities or Strategy/Services screen **will not** be displayed and user will be **directly** navigated to **"Review Implementation Plan"** screen.

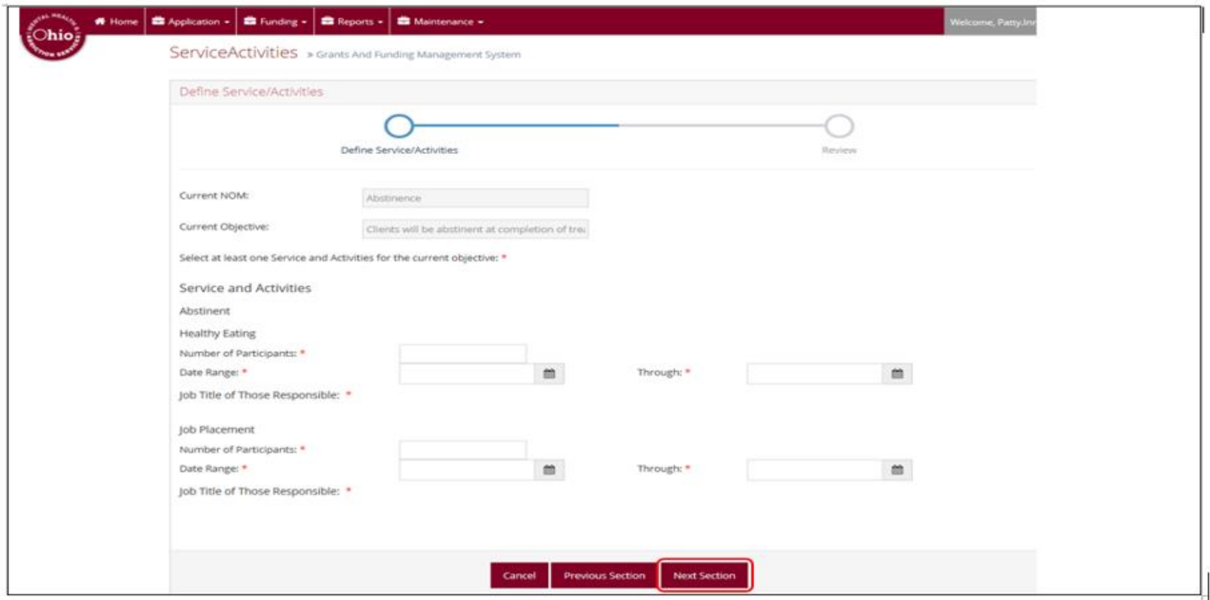
Strategy/Services

1. All of the Strategy/Services associated with the selected NOMs and Objectives will automatically show on the screen.
2. Select the appropriate Strategy& Services for the Strategy and enter an amount in 'Enter Est. Served' field to be served.
3. Select the Next Section button. (Data is saved)



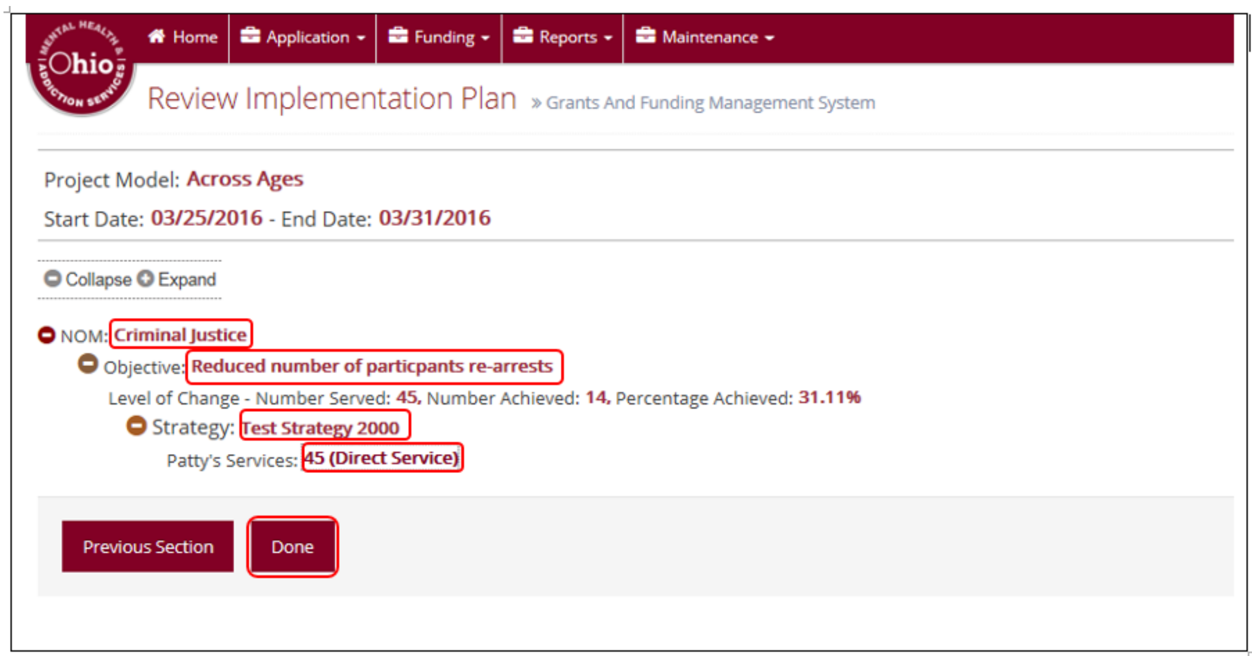
Service/Activities

1. All of the Service/Activities associated with the selected NOMs and Objectives will automatically show on the screen.
2. For each Service/Activities complete the required information and **select** the Next Section button. Data is saved.

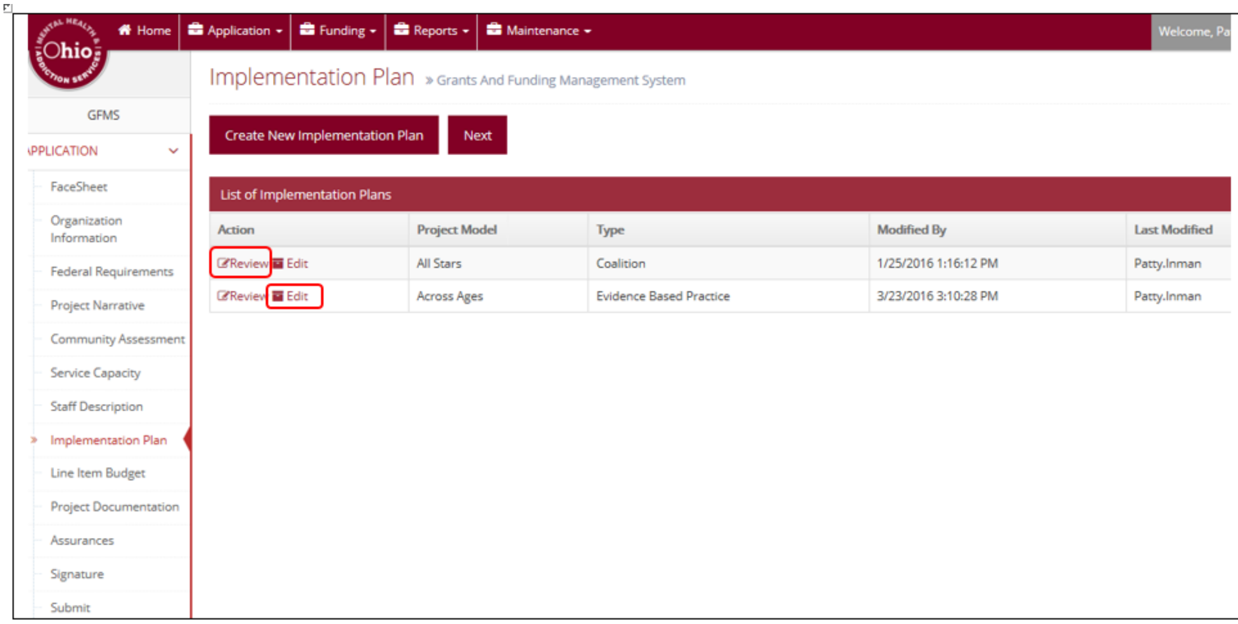


Review Implementation Plan

1. The Review screen allows the user to review the implementation plan and make any changes. To make changes in a section, **select** the link in red text to be taken back to that specific screen as highlighted below in the snapshot:
2. **Select** the Done button to be taken back to the Implementation Plan screen. When user **clicks** on Done button, the data will be saved successfully.



3. All Implementation Plans that are created will be listed in the ‘List of Implementation Plans’ table.
4. The entries in the ‘List of Implementation Plans’ table, may be edited or reviewed by clicking on the Edit or Review link, displayed in the snapshot below:



5. Select the <u>Next</u> button (Data is saved) to move to the next section of the application.

<u>Line Item Budget:</u>

The Line Item Budget screen allows the user to enter how the funds will be budgeted for the project.

1. There are two sections to the Line Item Budget; ‘Direct Costs’ and ‘Indirect Costs’.
2. Input the budget amounts into the appropriate line item.
3. A Narrative must be provided for each line item that shows an amount.
4. When an amount is entered into the column titled ‘Budget Revision’ for a line item, the calculation for the columns titled ‘Difference between Original & Revision’ and ‘Percentage Difference’ will be automatically calculated.

1. For the **initial grant application**, the following columns **should not be shown**; MHAS Budget Revision, Narrative, Difference between Original & Budget Revisions, and Percentage Difference.

2. Once the application is in the **Awarded status**, the MHAS Funding and Narrative columns are **grayed out** and **cannot be edited.**

3. If application status is **Revision**, the MHAS Funding, Narrative, Other Funding, Narrative, and Total columns will be **grayed out** and **cannot be edited.**

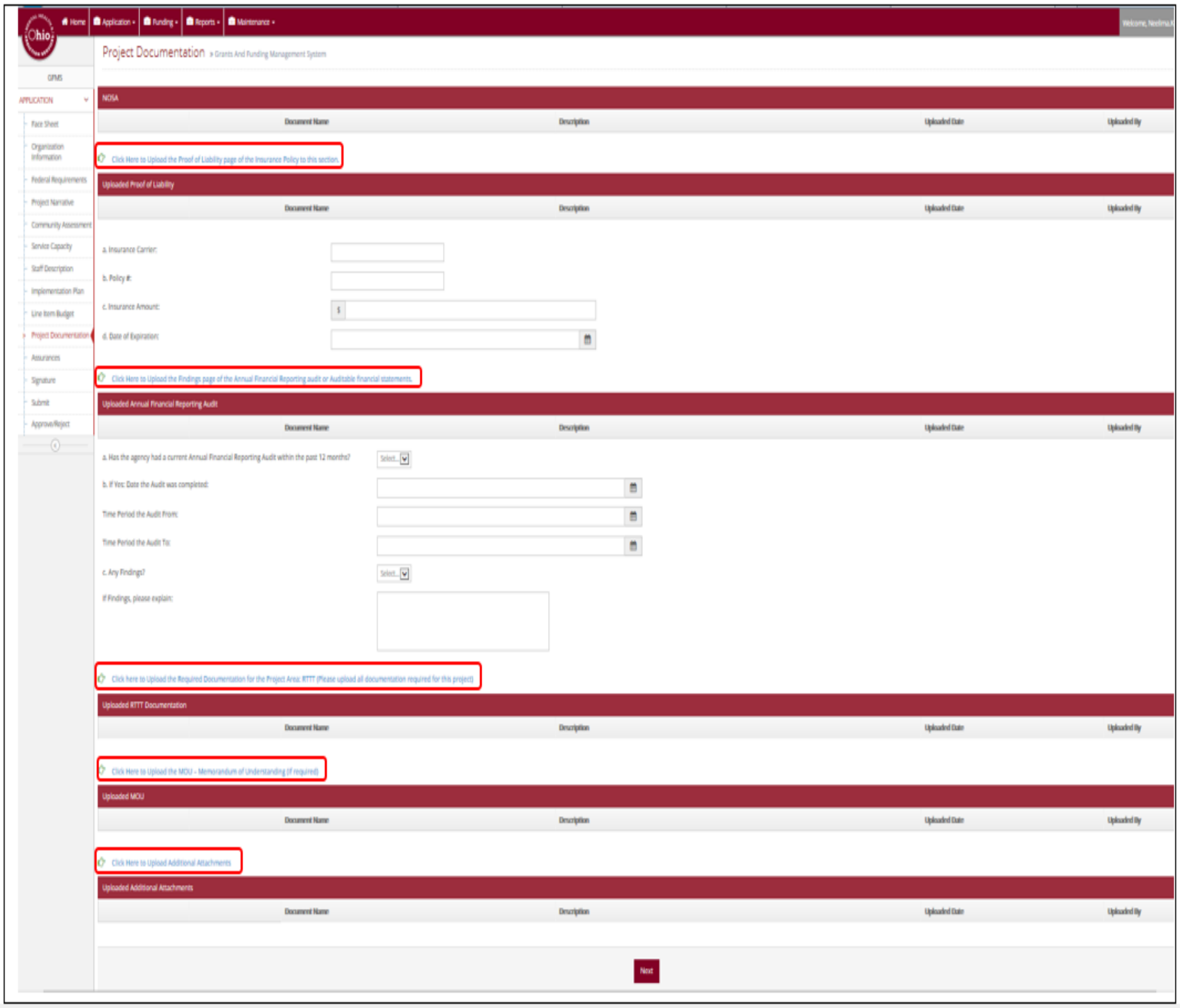
4. If application status is **Renewed**, the initial grant application rules will be applied to the renewed application.

1. Grand Total is the **total** of the costs listed in **Total Direct Costs** and **Total Indirect Costs**. The Grand Total of the MHAS Funding column must **match** what is in the 'Amount Requested' field on the Face Sheet.

**For Board, the column name "MHAS" will be changed to "Board" as displayed in the snapshot below:*

Project Documentation:

The Project Documentation screen is where the Insurance Policy, Annual Financial Reporting Audit, MOU, Project Documentation, and any additional documents will be attached (upload) as highlighted in the snapshot below:

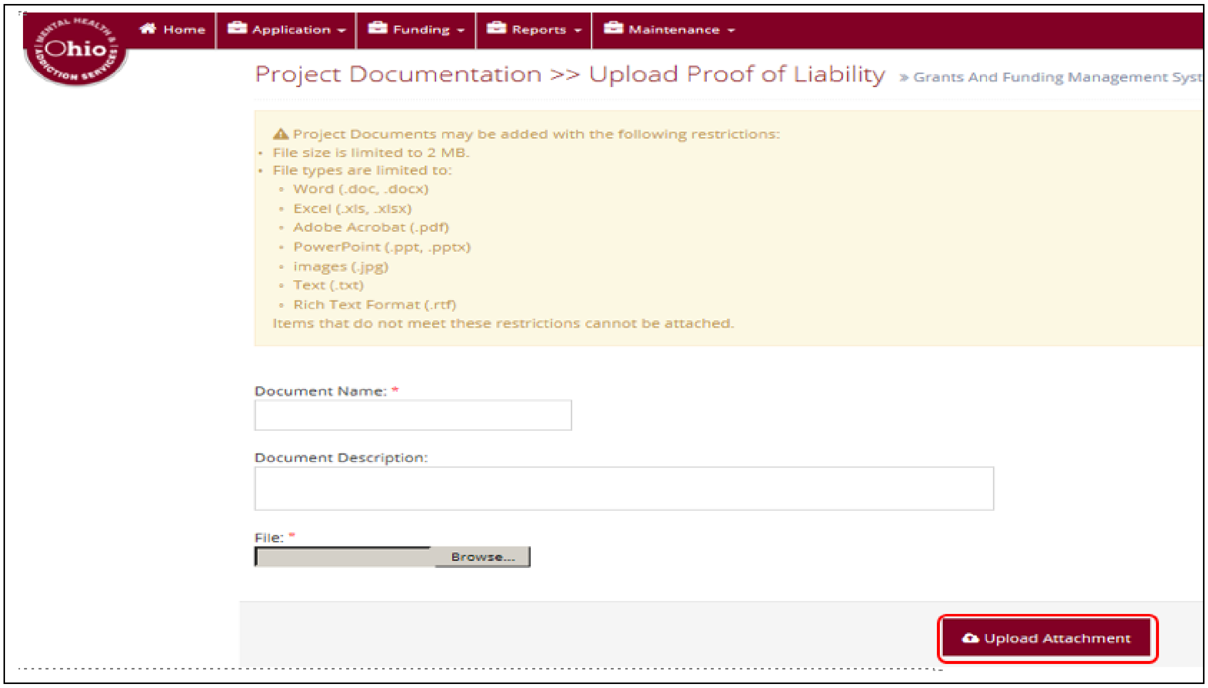


**For Board, NOSA Section will not be displayed, Proof and Annual Financial Reporting Audit sections are not the required sections to fill in.*

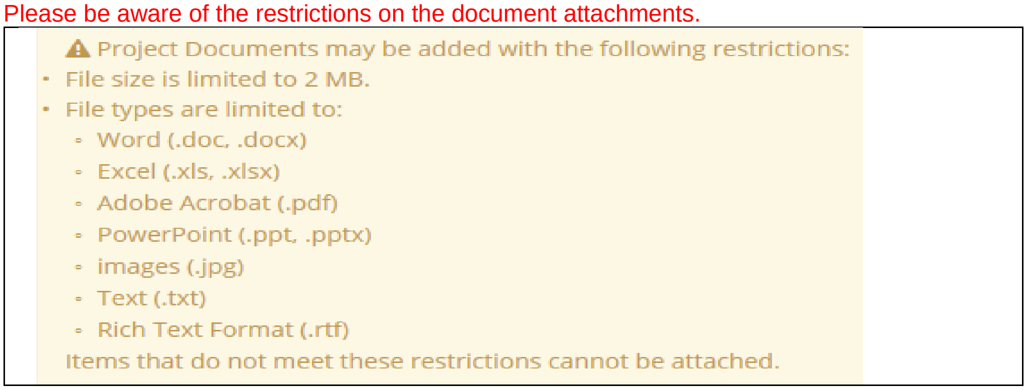
How to Attach Documents

1. All documents on the “Project 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 as displayed in the snapshot below:

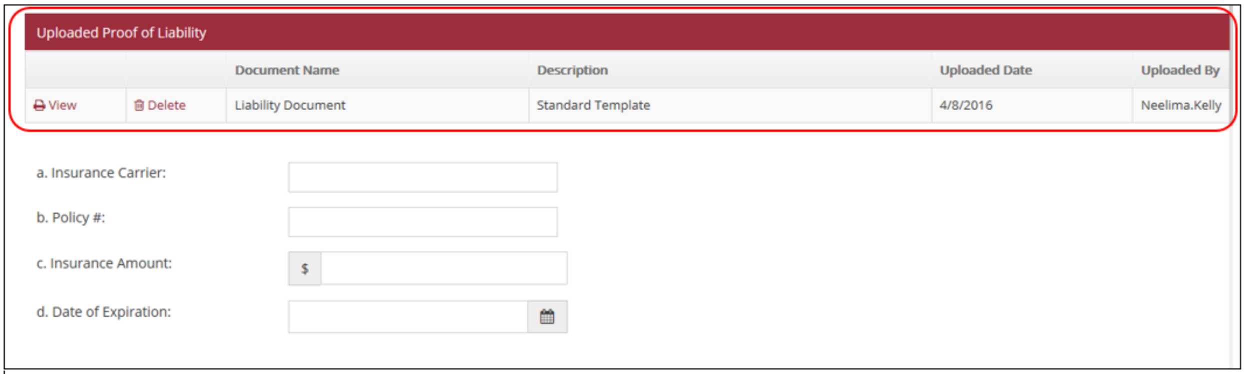


Please be aware of the restrictions on the document attachments.



<u>Uploaded Proof of Liability</u>

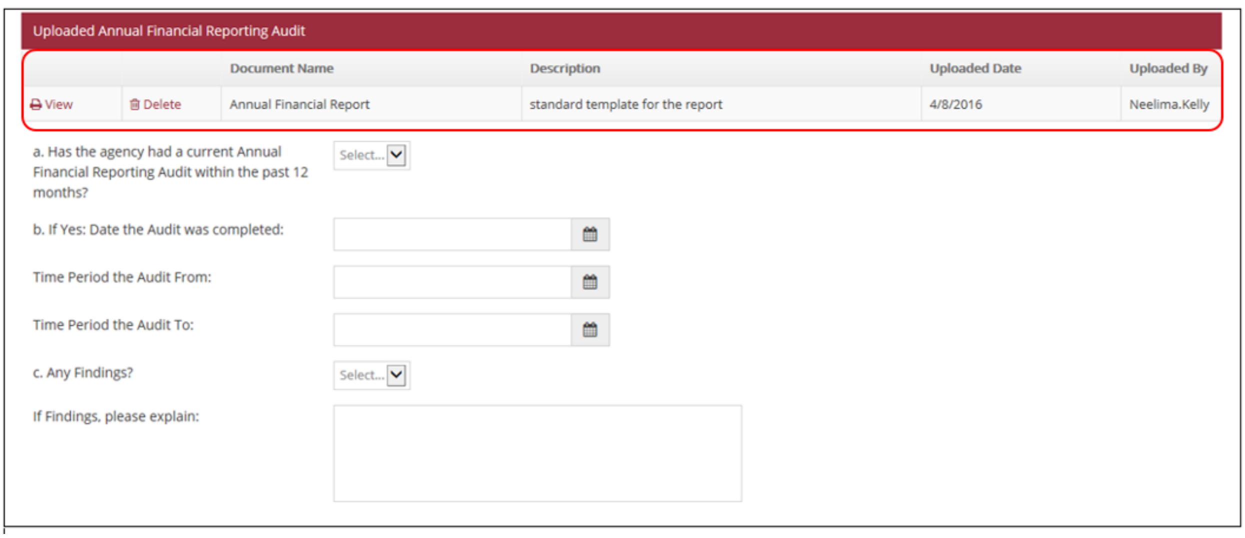
1. **Enter** the information as indicated for each field.
2. See the section titled; 'How to Attach Documents' for instructions on how to attach the required documents.
3. Once the document has been uploaded, it will appear in the table titled, "Uploaded Proof of Liability" as highlighted in the snapshot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



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

<u>Uploaded Annual Financial Reporting Audit</u>

1. **Enter** the information as indicated for each field.
2. If you **select** the answer <u>Yes</u> to question a, then you will be **required** to provide a 'Date the Audit was Completed'.
3. If you **select** the answer <u>Yes</u> to question c, then you will be **required** to provide an explanation.
4. See the section titled; 'How to Attach Documents' for instructions on how to attach the required documents.
5. Once the document has been uploaded, it will appear in the table titled, "Uploaded Annual Financial Reporting Audit" as highlighted in the snapshot below:



6. If this is the only section in the "Project Documentation" screen that needs completed, select the <u>Next</u> button.
7. If there are other sections in the "Project Documentation" screen that needs to be completed, then proceed to the next section on the screen.

<u>Uploaded Project Documentation</u>

1. The 'Project Name' will appear automatically as the table header depending on the Project that was selected on the Face Sheet.
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 *project name* Documentation'.

Click here to Upload the Required Documentation for the Project Area: RTTT (Please upload all documentation required for this project)

Uploaded RTTT Documentation					
		Document Name	Description	Uploaded Date	Uploaded By
View	Delete	RTT Doc	RTT Doc	4/8/2016	Neelima.Kelly

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

Uploaded MOU

1. See the section titled; 'How to Attach Documents' for instructions on how to attach the required documents.
2. Once the document has been uploaded, it will appear in the table titled, 'Uploaded MOU'.

Click Here to Upload the MOU – Memorandum of Understanding (if required)

Uploaded MOU					
		Document Name	Description	Uploaded Date	Uploaded By
View	Delete	Memorandum	Standard Template	4/8/2016	Neelima.Kelly

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

Uploaded Additional Attachments

1. This section is to be used for any other additional attachments that may be needed to submit the application.
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 Additional Attachments'.

Click Here to Upload Additional Attachments

Uploaded Additional Attachments					
		Document Name	Description	Uploaded Date	Uploaded By
View	Delete	Secondary Insurance Doc	Secondary Insurance Doc	4/8/2016	Neelima.Kelly

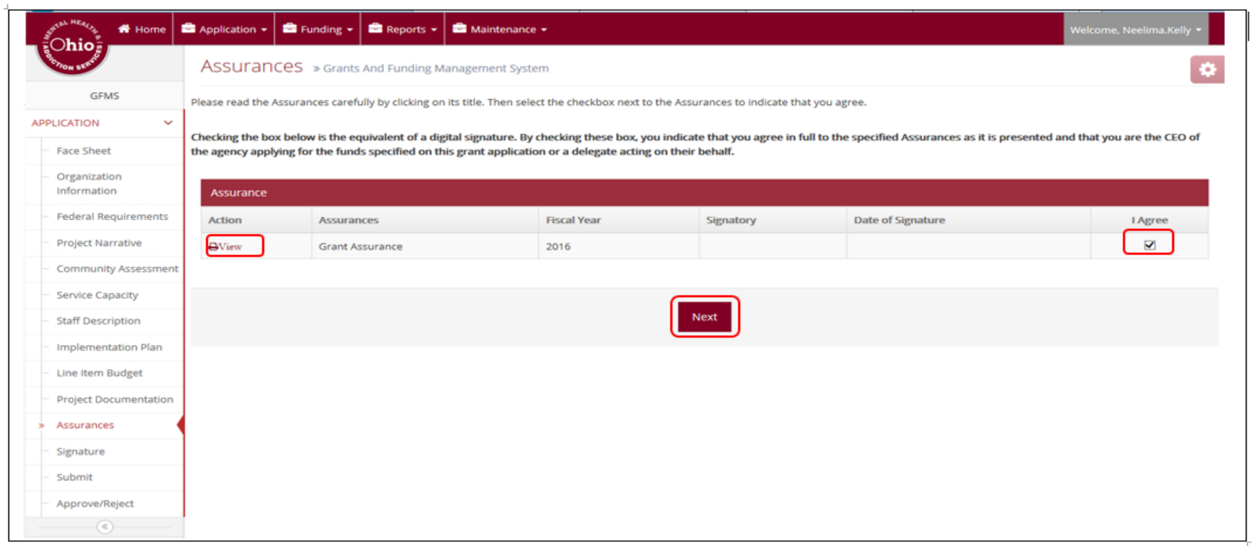
4. If this is the only section in the 'Project Documentation' screen that needs completed, select the Next button.
5. If there are other sections in the 'Project Documentation' screen that needs to be completed, then proceed to the next section on the screen.

1. When Grant Application Status is tagged as an **"Awarded" then only**, the NOSA section will be **populated** on the Project Documentation screen.

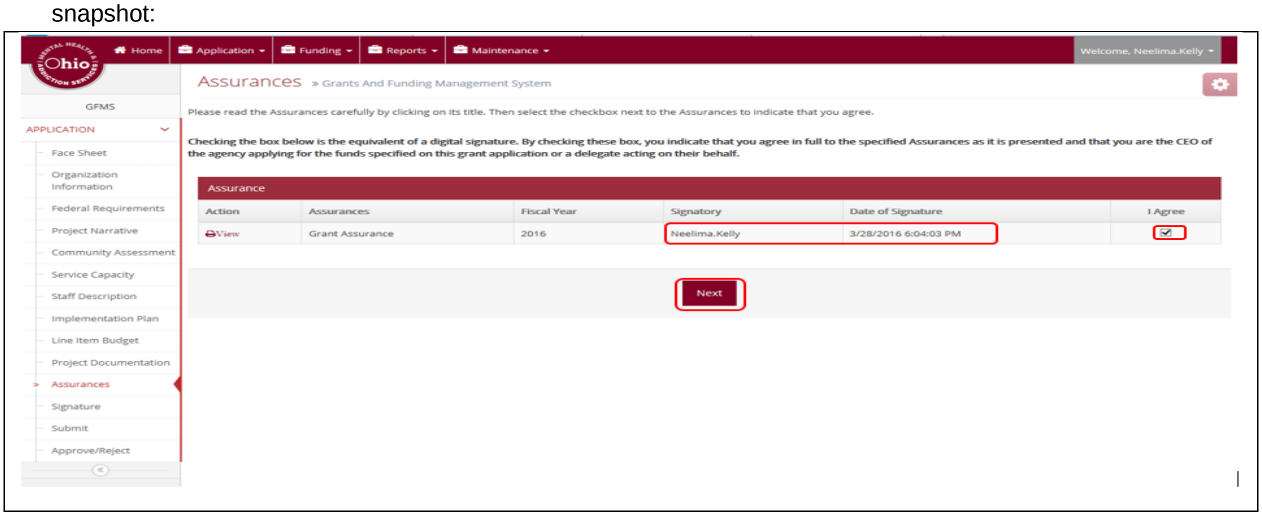
Assurances

The 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. **Click** in the ‘I Agree’ box to digitally sign that the assurance has been reviewed and agreed to.
3. **Click** on Next button (Data is saved) to be taken to the next screen.



4. A Signatory Name and Date of Signature will be displayed in the Assurance table as highlighted below in the snapshot:



**For Board Applicant, this page will be removed.*

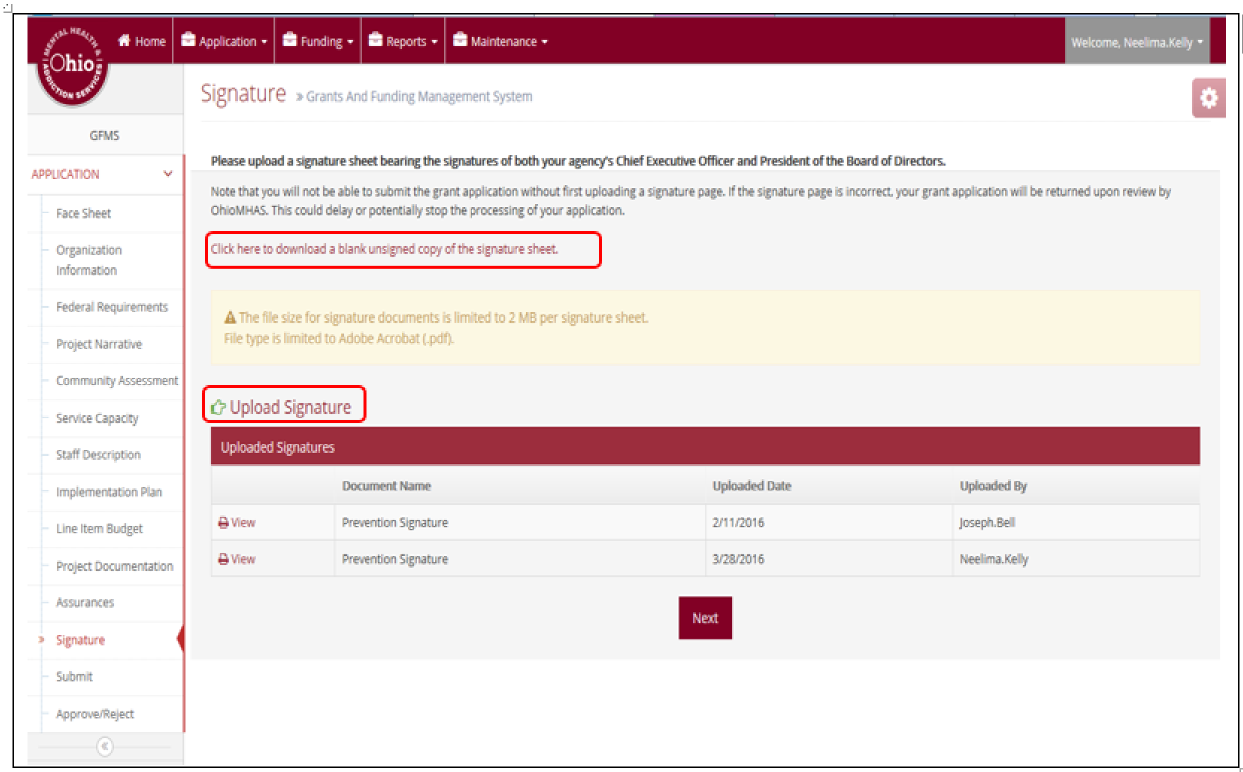
Signature

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

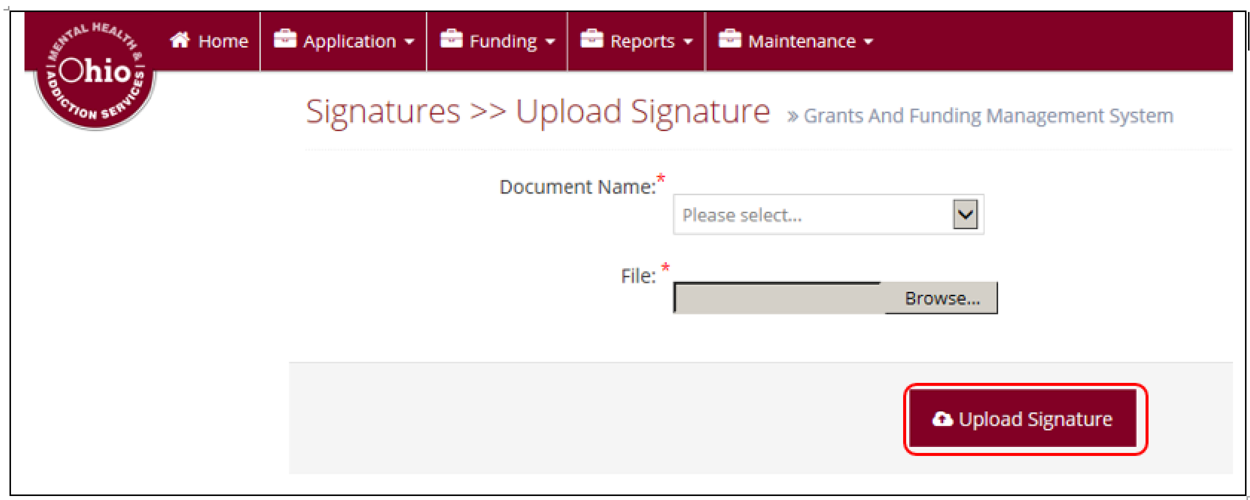
1. **Select** the Click Here link to download the signature sheet.

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

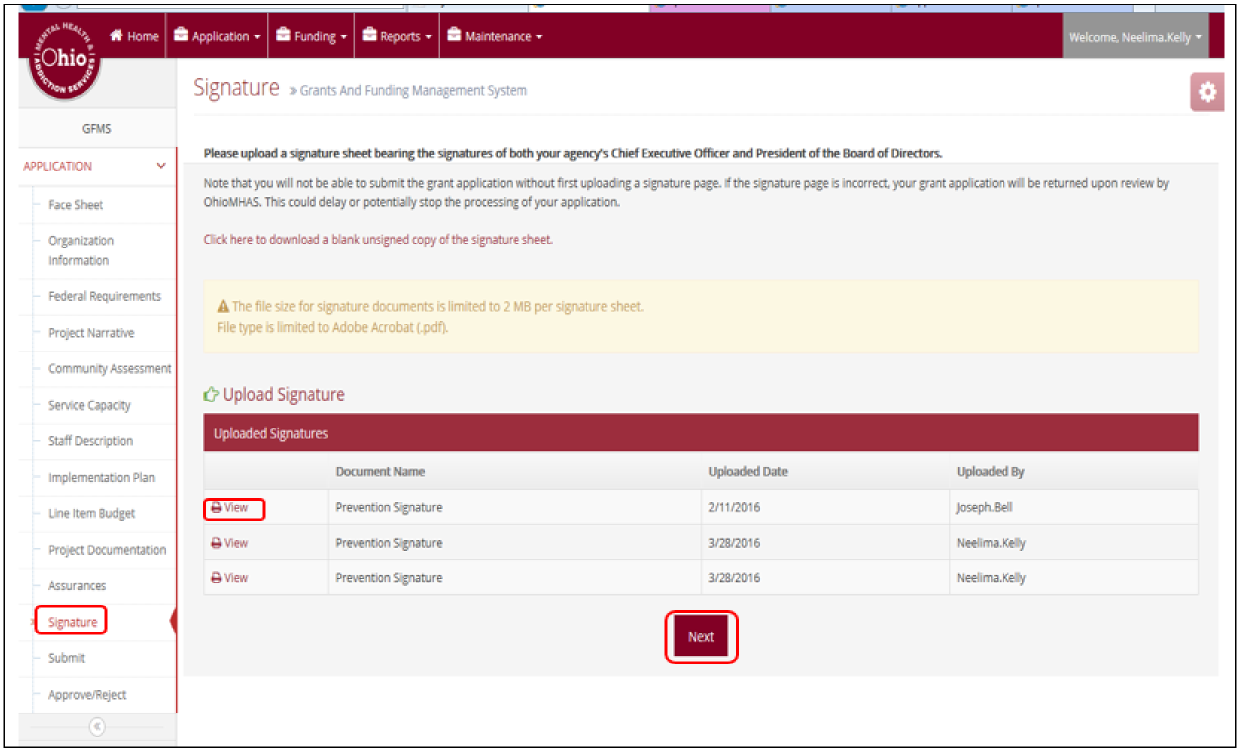
2. The signature sheet will be opened in a PDF format. **Print** the document, get it signed by the appropriate people, then **scan** and **save** the document to your computer.
3. To attach the signed Signature sheet to the application, **select** the Upload Signature link.



4. The Upload Signature pop-up window will appear.
5. **Input** the Document Name and Upload the signature document. **Click** on Upload Signature button. See the section in the user guide titled: 'How to Attach Documents' for detailed instructions.



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



Please note the restrictions for uploading this signature document.

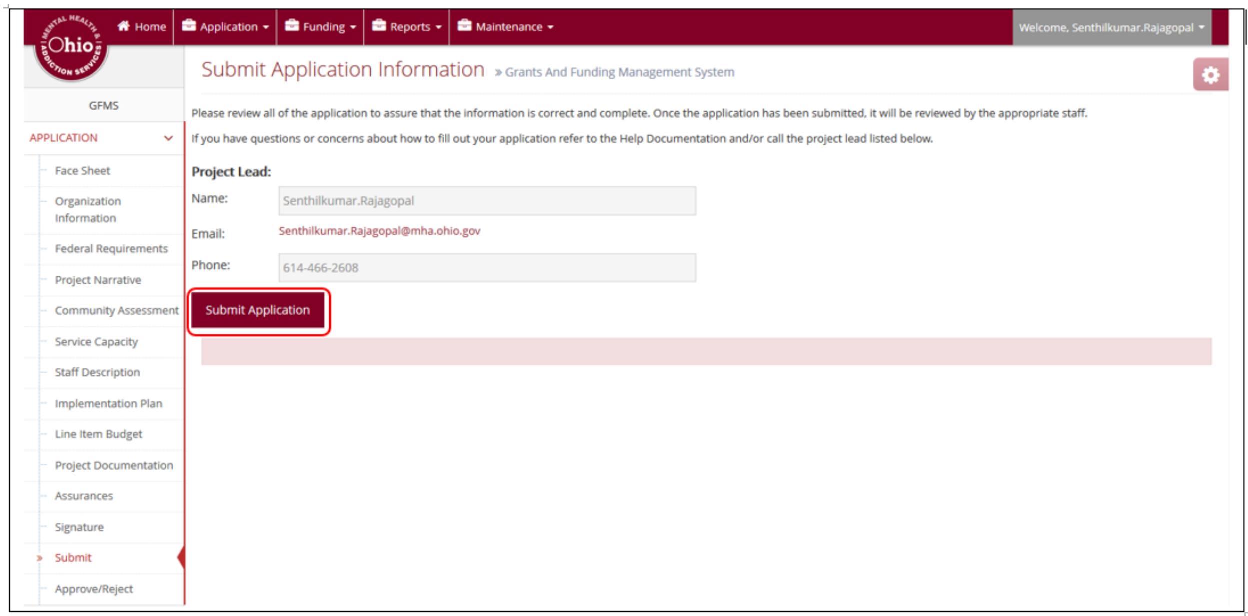
> The file size for signature documents is limited to 2 MB per signature sheet.
> File type is limited to Adobe Acrobat (.pdf).

**For Board Applicant, this page will be removed.*

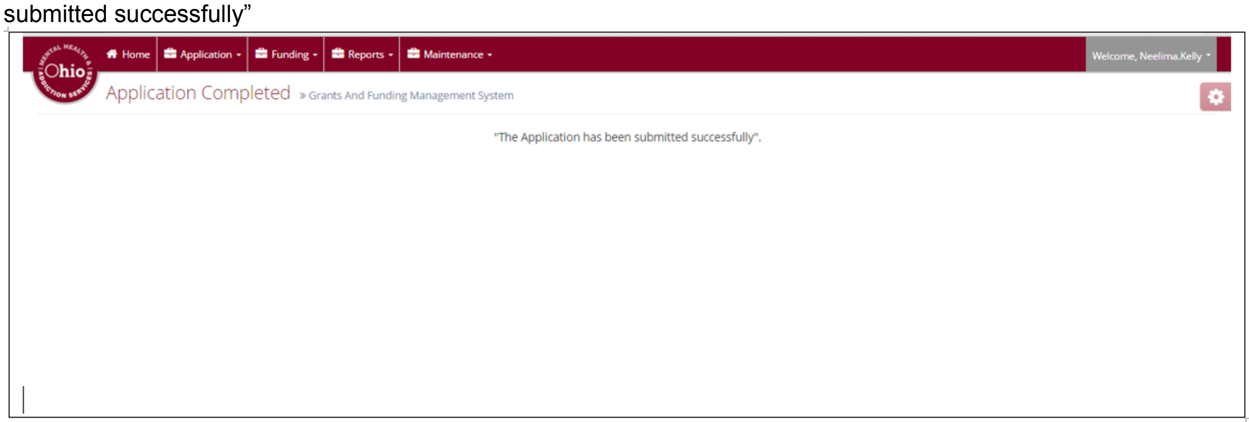
Submit

The 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.

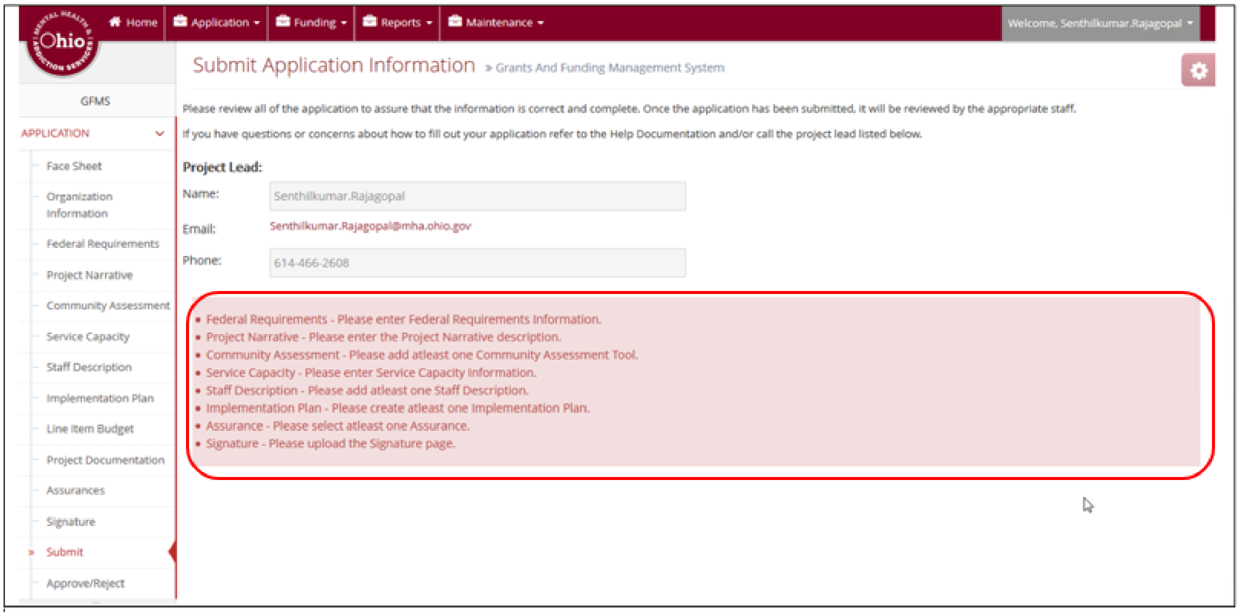
1. Select the Submit Application button.



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



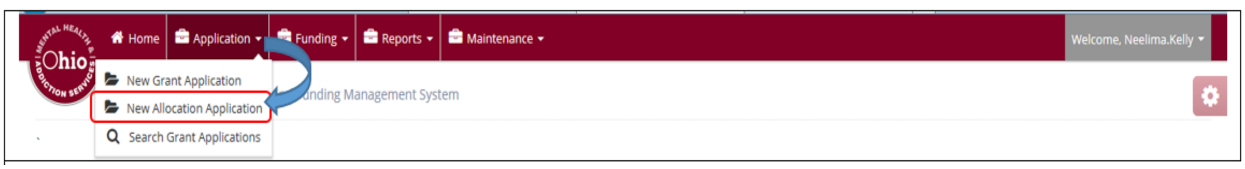
3. If the required information is not entered on the application pages and user **clicks** on Submit button, the system will ask user to enter the information, Example highlighted in the snapshot below:



**For Board Applicant, the instructions will be "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. The Project Lead information will be removed.*

New Allocations Application:

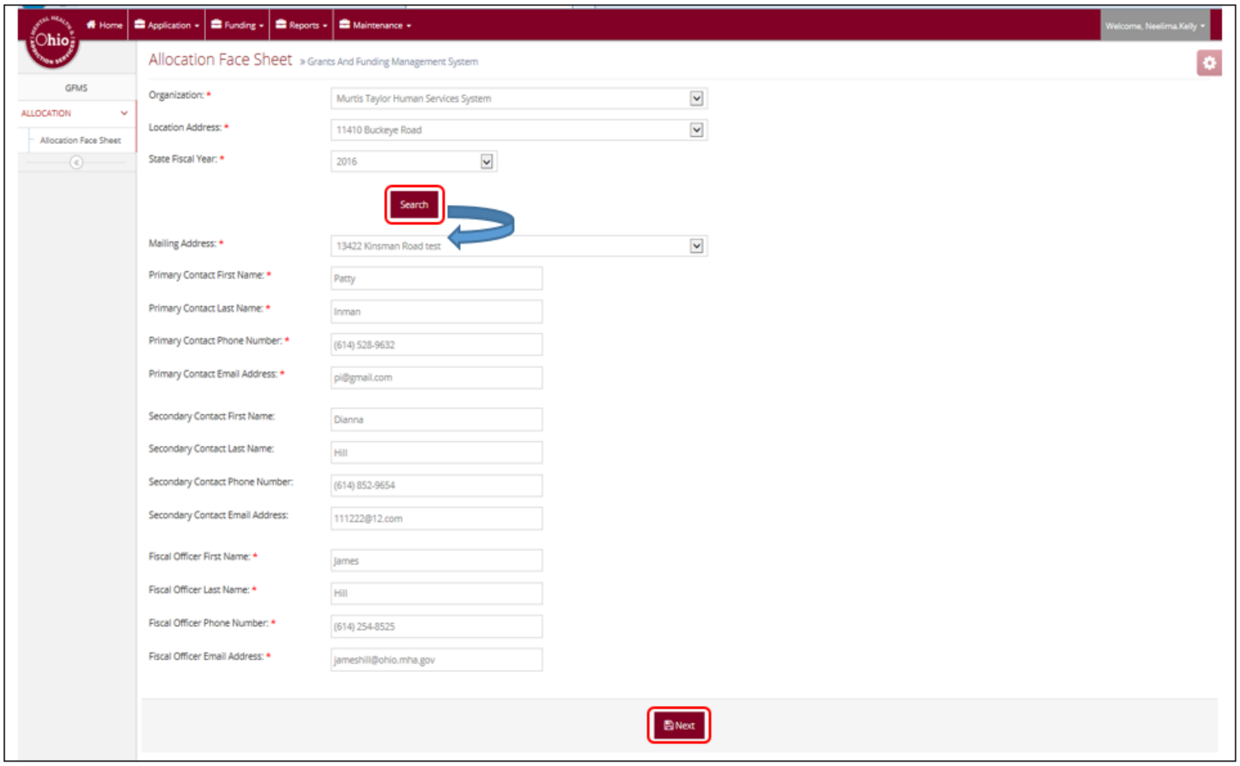
An Applicant is provisioned to access the MHAS Funding and Grants and Funding Management System to create an allocation application for the allocations. Here, the user logs into IPortal and has the option to select GFMS to apply for an allocation. Under the "Application" tab, selects the "New Allocation Application" option as displayed in the snapshot below:



Allocation Face Sheet

You are on the first page, "Allocation Face Sheet" of the allocation application. This page provides the initial information for the allocation application.

1. **Select** the information as indicated per each field on "Allocation Face Sheet" screen. Fields with red asterisks * are required fields.
2. **Click** on Search button. The fields will be displayed on the basis of selected input.
3. **Select and Enter** the information as indicated per each field**.** Fields with red asterisks * are required fields.
4. After all of the required information has been added, **click** on Next button (Data is saved) to be taken to the next screen.

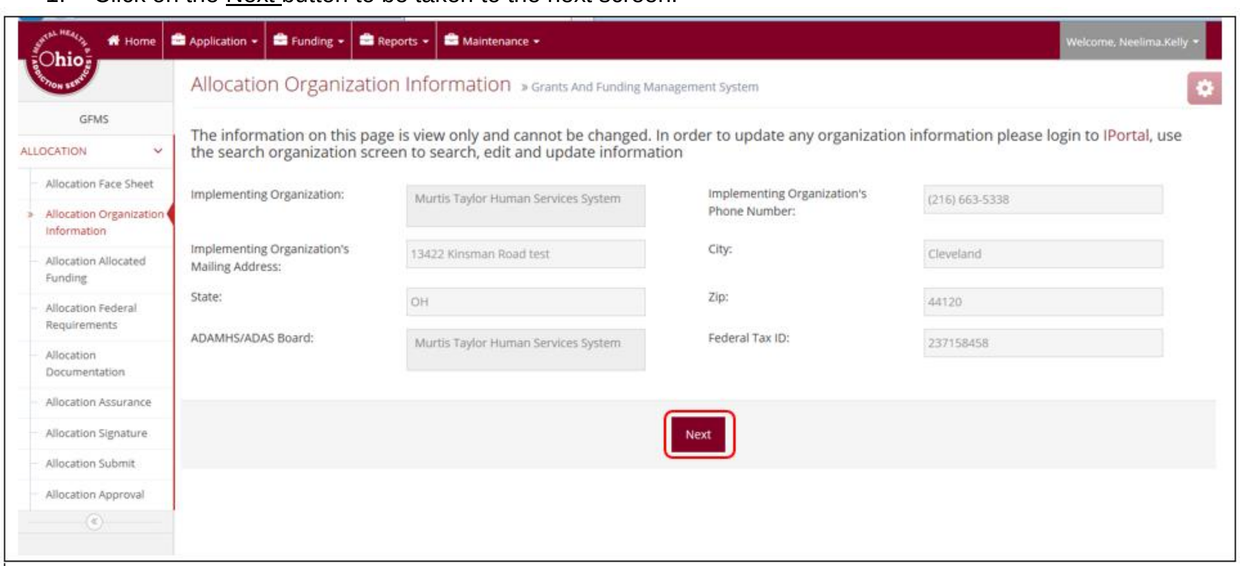


Allocation Organization Information

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. The information on this page is **view only** and cannot be changed. In order to **update** the information on this page, an Application Admin will need to make the update via the **IPortal** registration screen. Certification information must be updated through Licensure & Certification.

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

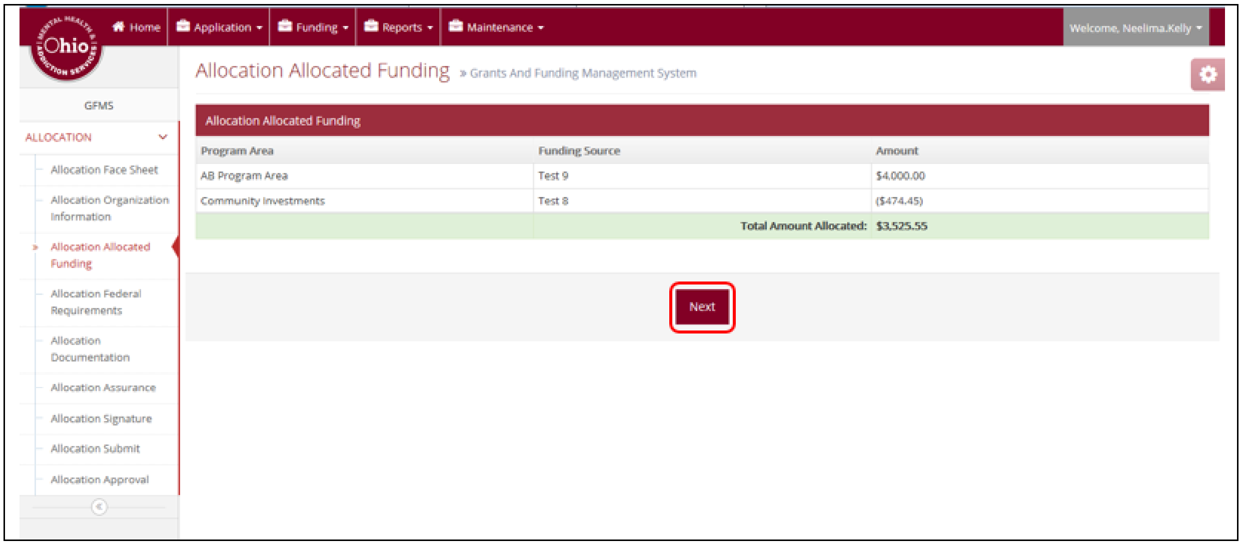


Allocation Allocated Funding

This page captures the funding that has been allocated to the organization.

1.The Allocation Allocated Funding information is populated from the allocation funding page located in the funding tab.

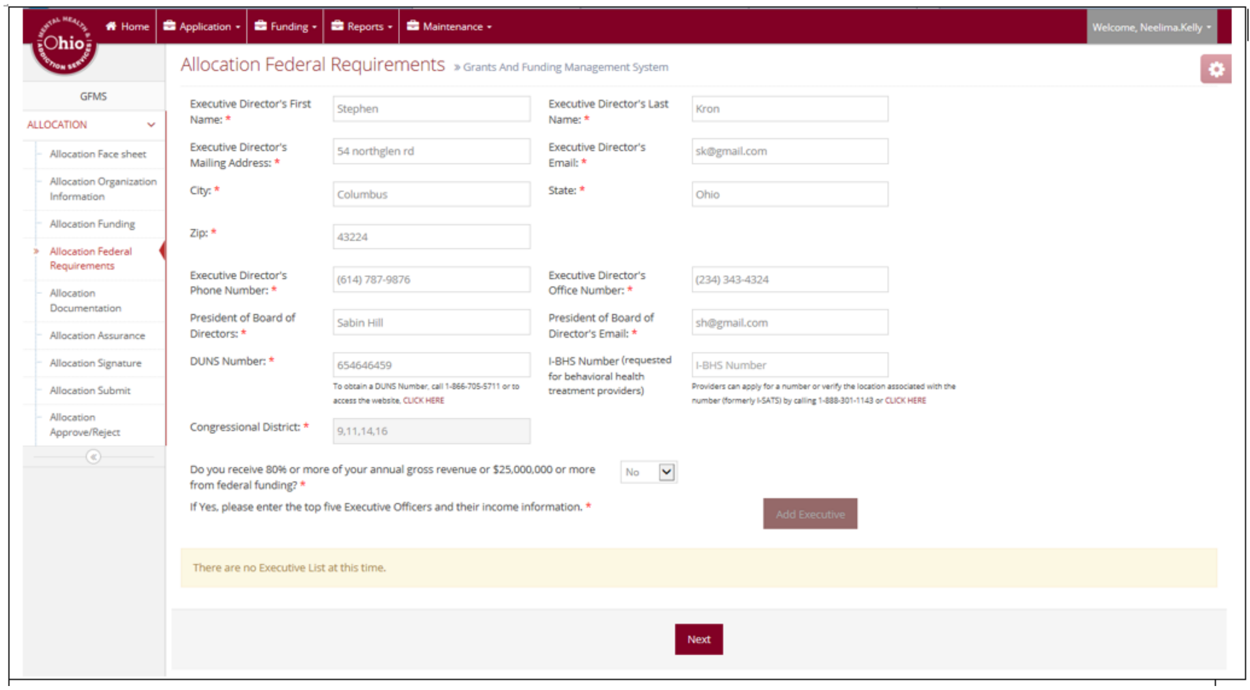
1. Click on the Next button to be taken to the next screen.



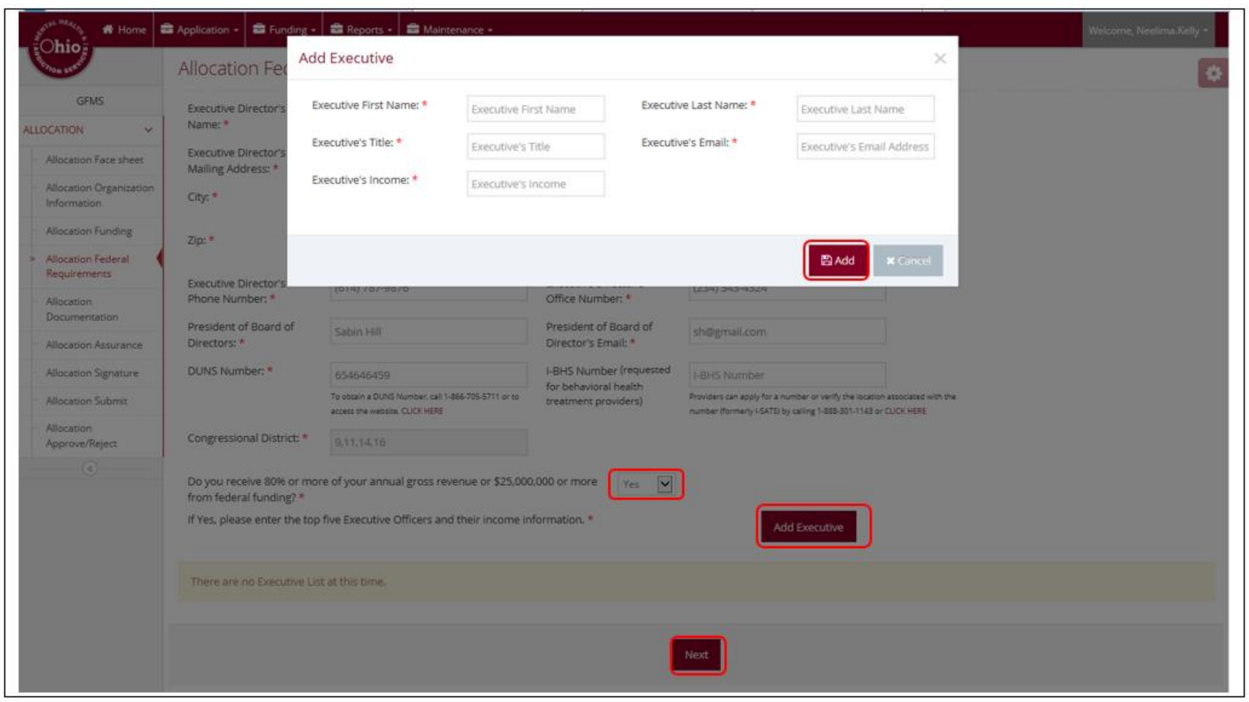
Allocation Federal Requirements

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

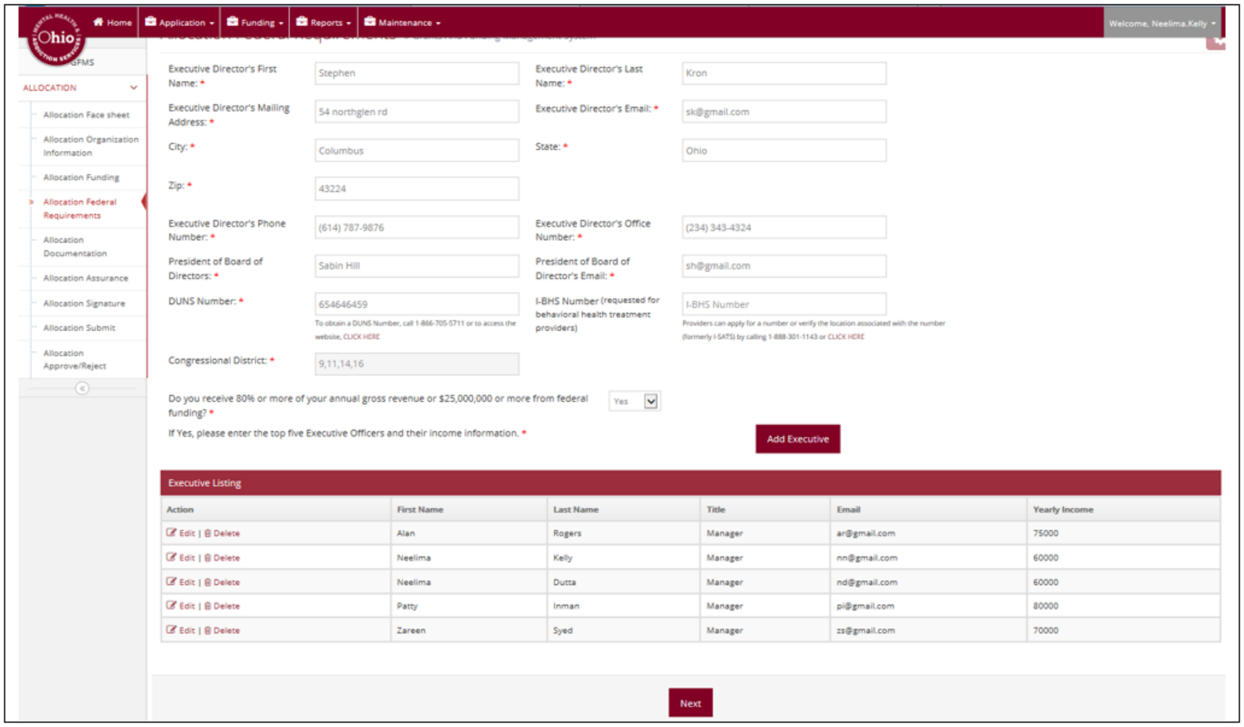
1. **Select** and **Enter** the information as indicated per each field on “Allocation Federal Requirement” screen.
2. Fields with red asterisks * are required fields.



3. To add Executives Director, **select** the Add Executive button on the Allocation Federal Requirements screen, an "Add Executive" pop-up window will be displayed.



4. 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.
5. After all of the required information has been added, **select** the Next (Data is saved) button to be taken to the next screen.



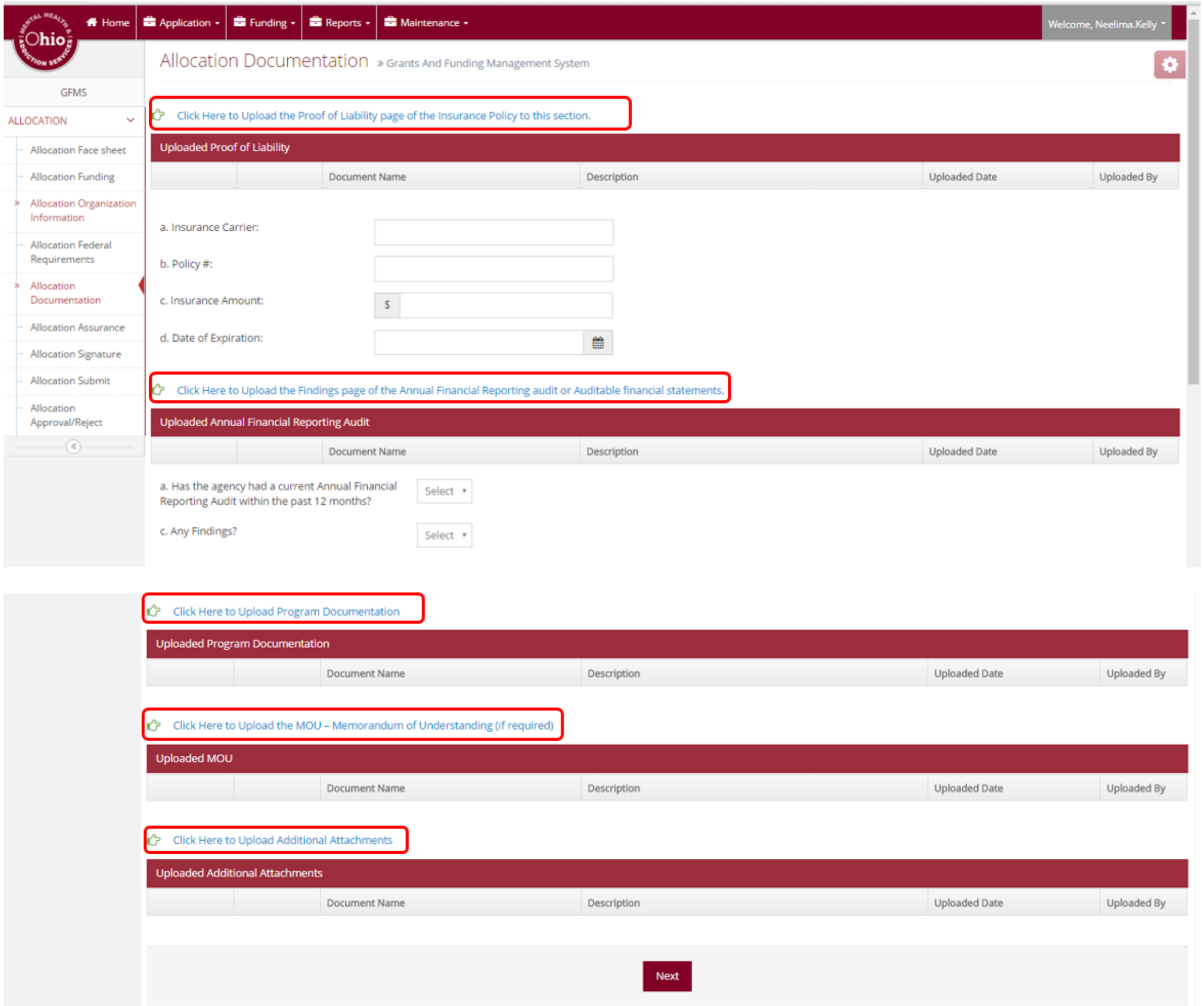
Allocation Documentation

The Allocation Documentation screen is where the Insurance Policy, Annual Financial Reporting Audit, Title XX reports, program documentation, MOU and any additional documents will be attached (uploaded). There is an additional section for Title XX Reports where user can view and download the reports.

Non-Board View

In the non-board view, Allocation Documentation contains following sections as mentioned in the snapshot below:

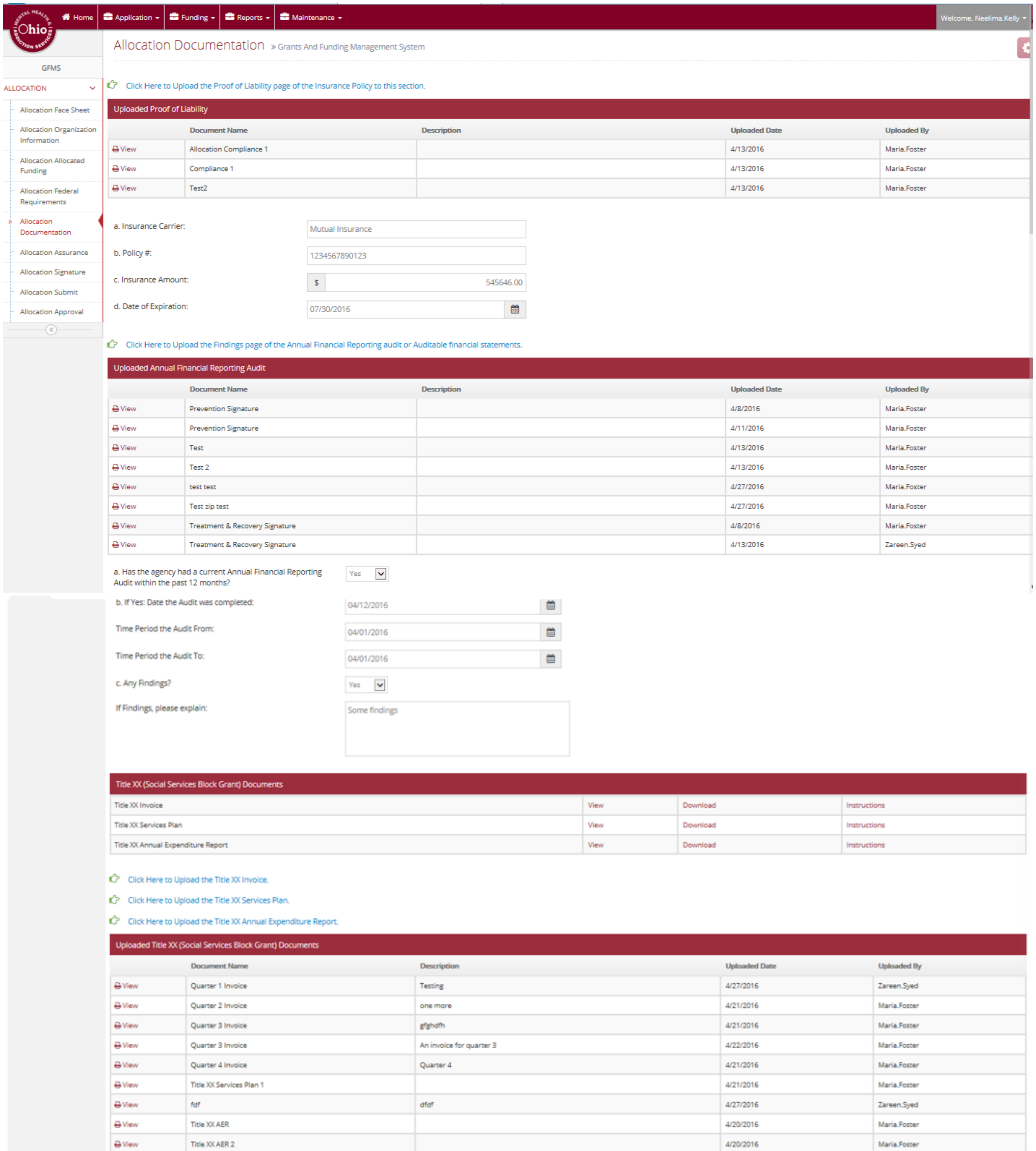
1. Uploaded Proof of Liability
2. Uploaded Annual Financial Report Audit
3. Upload Program Documentation
4. Upload MOU
5. Upload Additional Attachments.



Board View

In the board view, Allocation Documentation contains following sections as mentioned in the snapshot below:

1. Uploaded Proof of Liability
2. Uploaded Annual Financial Report Audit
3. Title XX (Social Services Block Grant) Documents
4. Uploaded Title XX (Social Services Block Grant) Documents
5. Upload Program Documentation
6. Upload MOU
7. Upload Additional Attachments.



Home | Application | Funding | Reports | Maintenance | Welcome, Neelima.Kelly

GFMS

ALLOCATION

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

Allocation Documentation » Grants And Funding Management System

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	Allocation Compliance 1		4/13/2016	Maria.Foster
View	Compliance 1		4/13/2016	Maria.Foster
View	Test2		4/13/2016	Maria.Foster

a. Insurance Carrier: Mutual Insurance

b. Policy #: 1234567890123

c. Insurance Amount: $ 545646.00

d. Date of Expiration: 07/30/2016

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	Prevention Signature		4/8/2016	Maria.Foster
View	Prevention Signature		4/11/2016	Maria.Foster
View	Test		4/13/2016	Maria.Foster
View	Test 2		4/13/2016	Maria.Foster
View	test test		4/27/2016	Maria.Foster
View	Test zip test		4/27/2016	Maria.Foster
View	Treatment & Recovery Signature		4/8/2016	Maria.Foster
View	Treatment & Recovery Signature		4/13/2016	Zareen.Syed

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

b. If Yes: Date the Audit was completed: 04/12/2016

Time Period the Audit From: 04/01/2016

Time Period the Audit To: 04/01/2016

c. Any Findings? Yes

If Findings, please explain: Some findings

Title XX (Social Services Block Grant) Documents

Title XX Invoice	View	Download	Instructions
Title XX Services Plan	View	Download	Instructions
Title XX Annual Expenditure Report	View	Download	Instructions

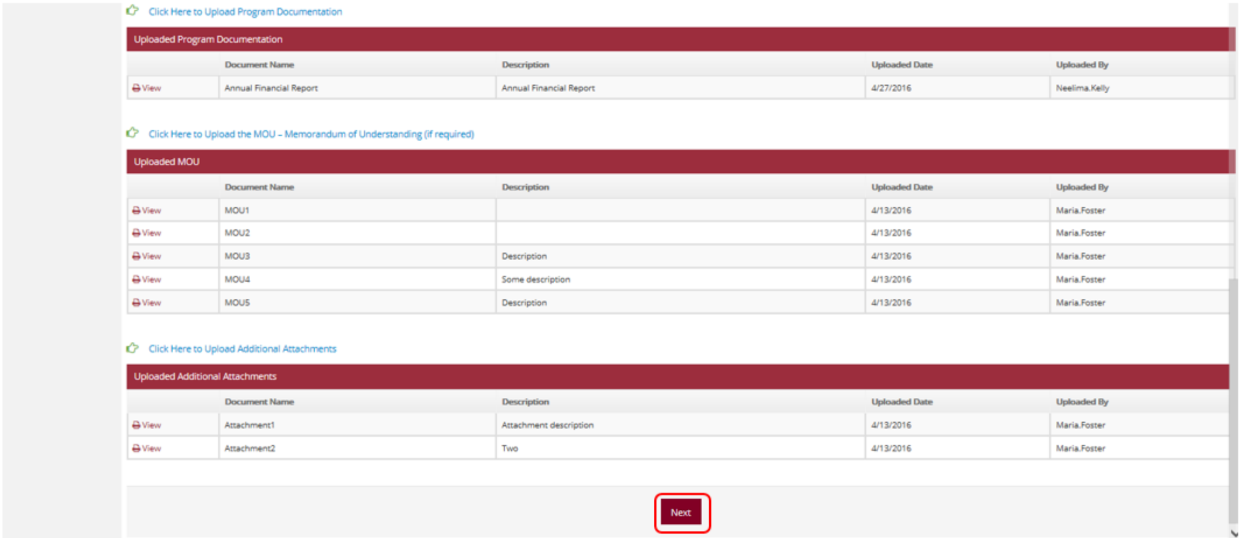
Click Here to Upload the Title XX Invoice.

Click Here to Upload the Title XX Services Plan.

Click Here to Upload the Title XX Annual Expenditure Report.

Uploaded Title XX (Social Services Block Grant) Documents

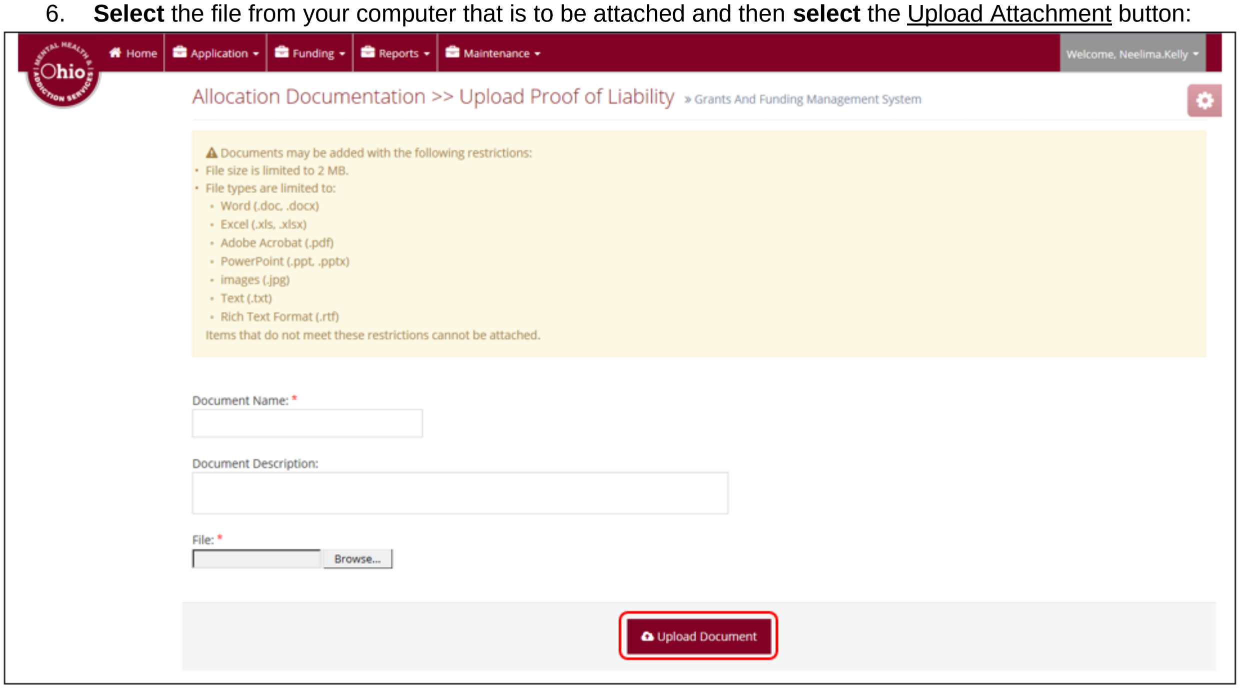
	Document Name	Description	Uploaded Date	Uploaded By
View	Quarter 1 Invoice	Testing	4/27/2016	Zareen.Syed
View	Quarter 2 Invoice	one more	4/21/2016	Maria.Foster
View	Quarter 3 Invoice	gfghdfh	4/21/2016	Maria.Foster
View	Quarter 3 Invoice	An invoice for quarter 3	4/22/2016	Maria.Foster
View	Quarter 4 Invoice	Quarter 4	4/21/2016	Maria.Foster
View	Title XX Services Plan 1		4/21/2016	Maria.Foster
View	fdf	dfdf	4/27/2016	Zareen.Syed
View	Title XX AER		4/20/2016	Maria.Foster
View	Title XX AER 2		4/20/2016	Maria.Foster



<u>How to Attach Documents</u>

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 <u>Click Here to Upload</u> 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 <u>Browse</u> button.
6. **Select** the file from your computer that is to be attached and then **select** the <u>Upload Attachment</u> button:



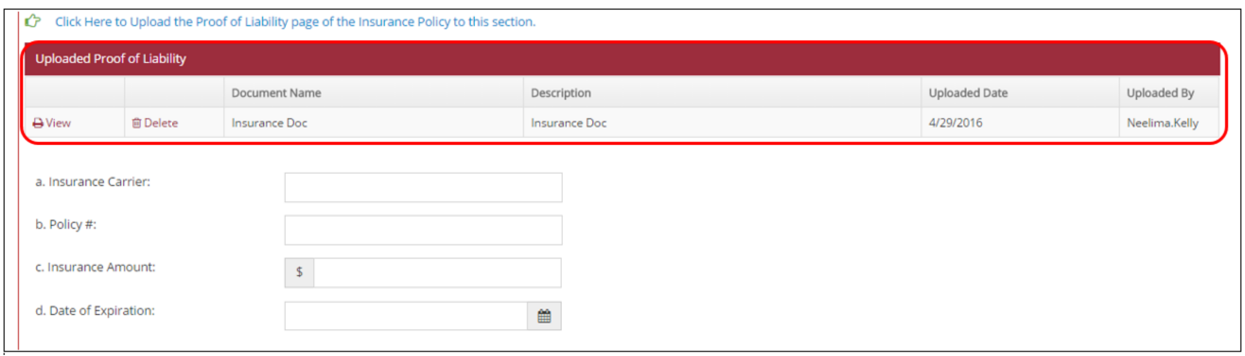
Please be aware of the restriction on the documents attachments.

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 #:

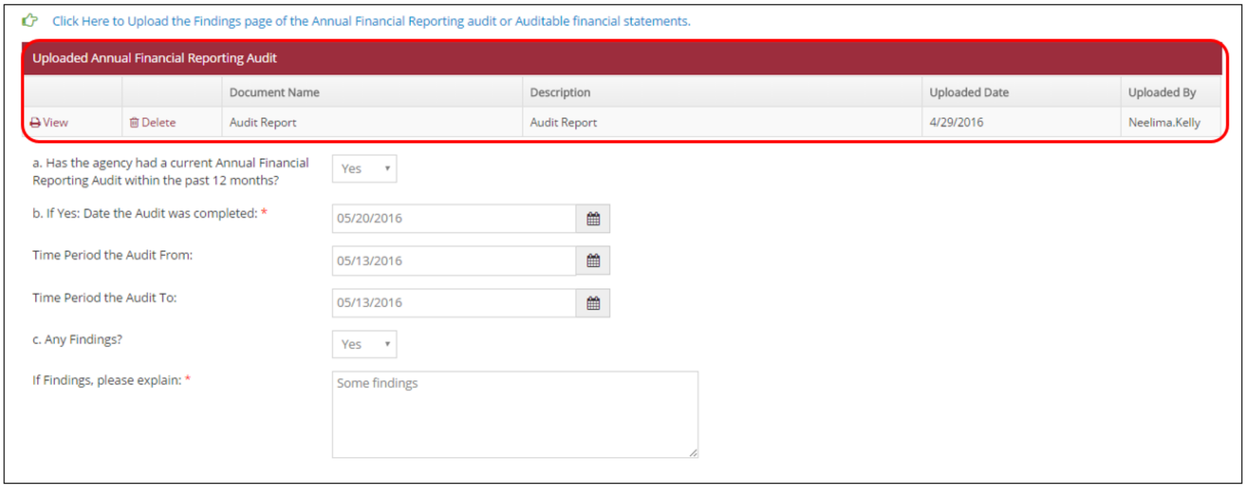
c. Insurance Amount: $

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. See the section titled; ‘How to Attach Documents’ for instructions on how to attach the required documents.
5. 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? Yes

b. If Yes: Date the Audit was completed: * 05/20/2016

Time Period the Audit From: 05/13/2016

Time Period the Audit To: 05/13/2016

c. Any Findings? Yes

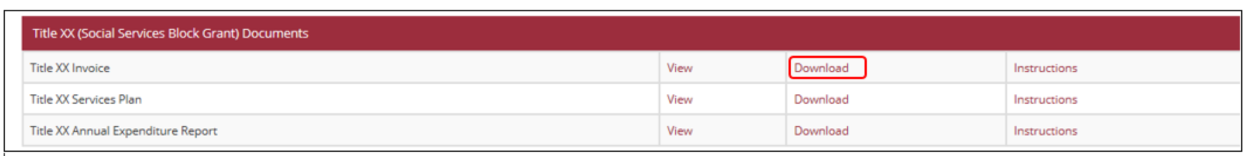
If Findings, please explain: * Some findings

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

<u>Download the Uploaded Title XX Reports/Documents</u>

1. **Click** on View link to read the documents.
2. **Click** on Download link to download the document.
3. **Click** on Delete link to delete the document.

*Note:This section will be appeared for boards only.



Title XX (Social Services Block Grant) Documents

Title XX Invoice	View	Download	Instructions
Title XX Services Plan	View	Download	Instructions
Title XX Annual Expenditure Report	View	Download	Instructions

<u>Uploaded Title XX Reports/Documents</u>

1. See the section titled; ‘How to Attach Documents’ for instructions on how to attach the required documents.
2. Once the document has been uploaded, it will appear in the table titled, ‘Uploaded Title XX Documentation’. You can view the document.
3. If this is the only section in the ‘Allocation Documentation’ screen that needs completed, select the <u>Next</u> button.
4. If there are other sections in the ‘Allocation Documentation’ screen that needs to be completed, then proceed to the next section on the screen.

*Note:This section will be appeared for boards only and the delete option will be available until the allocation application is submitted.

Click Here to Upload the Title XX Invoice.

Click Here to Upload the Title XX Services Plan.

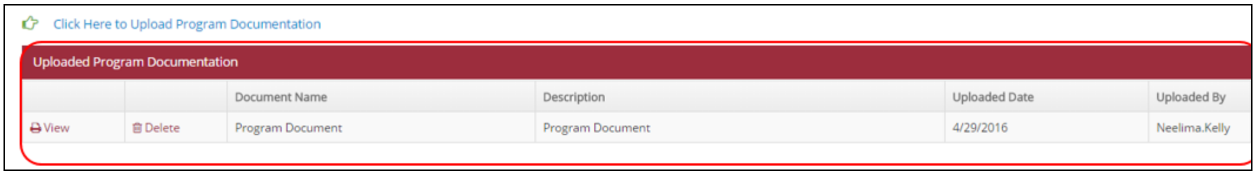
Click Here to Upload the Title XX Annual Expenditure Report.

Uploaded Title XX (Social Services Block Grant) Documents

	Document Name	Description	Uploaded Date	Uploaded By
View	Quarter 1 Invoice	Testing	4/27/2016	Zareen.Syed

Uploaded Program Documentation

1. The ‘Program Name’ will appear automatically as the table header depending on the Project that was selected on the Face Sheet.
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 *program name* Documentation’.



Click Here to Upload Program Documentation

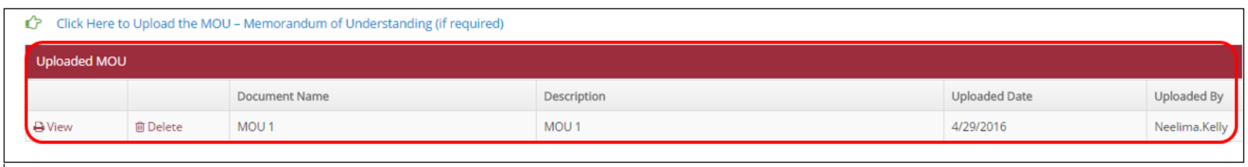
Uploaded Program Documentation

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

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 MOU

1. See the section titled; ‘How to Attach Documents’ for instructions on how to attach the required documents.
2. Once the document has been uploaded, it will appear in the table titled, ‘Uploaded MOU’.



Click Here to Upload the MOU – Memorandum of Understanding (if required)

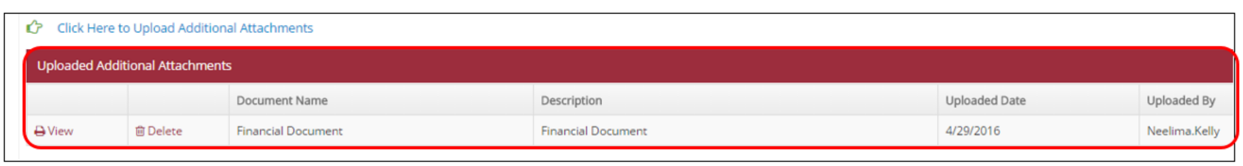
Uploaded MOU

		Document Name	Description	Uploaded Date	Uploaded By
View	Delete	MOU 1	MOU 1	4/29/2016	Neelima.Kelly

3. If this is the only section in the ‘Allocation Documentation’ screen that needs completed, **select** the Next button.
4. 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 Additional Attachments

1. This section is to be used for any other additional attachments that may be needed to submit the application.
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 Additional Attachments’.



Click Here to Upload Additional Attachments

Uploaded Additional Attachments

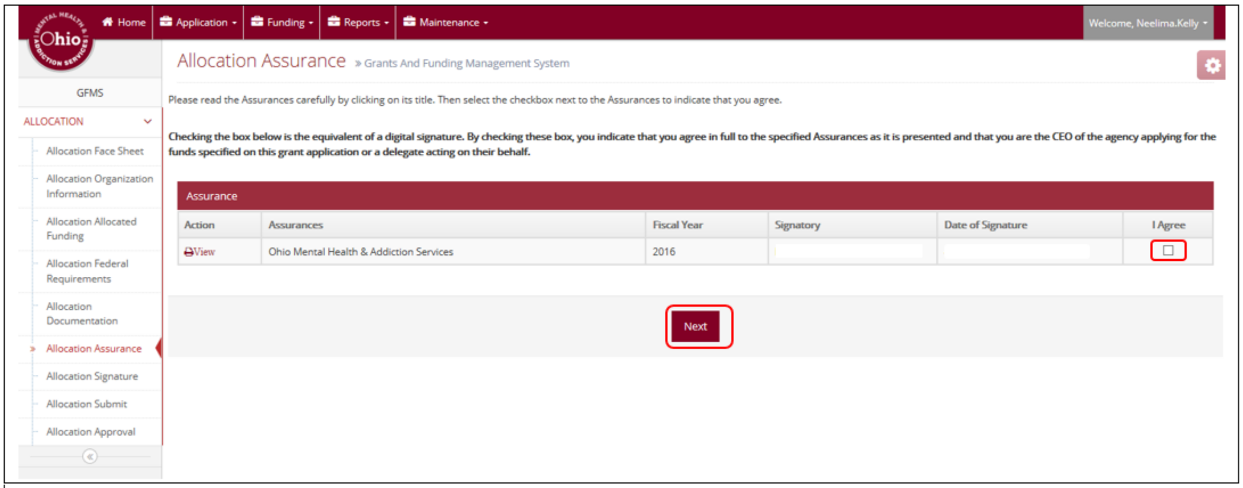
		Document Name	Description	Uploaded Date	Uploaded By
View	Delete	Financial Document	Financial Document	4/29/2016	Neelima.Kelly

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.

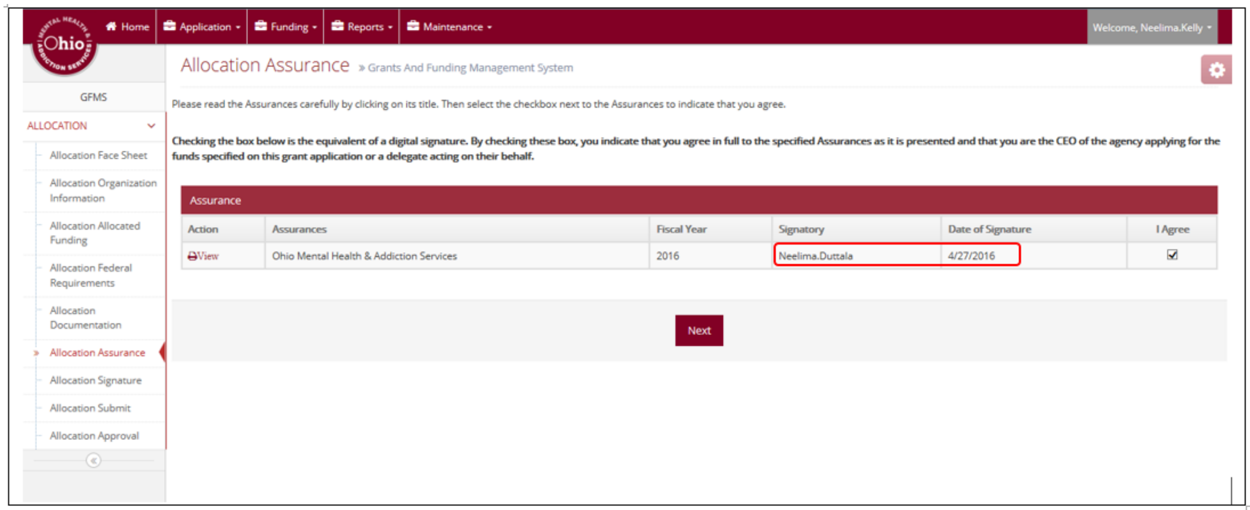
Allocation Assurance

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 (Data is saved) to be taken to the next screen.



4. A Signatory Name and Date of Signature will be displayed in the Assurance table as highlighted below in the snapshot:



Allocation Signature

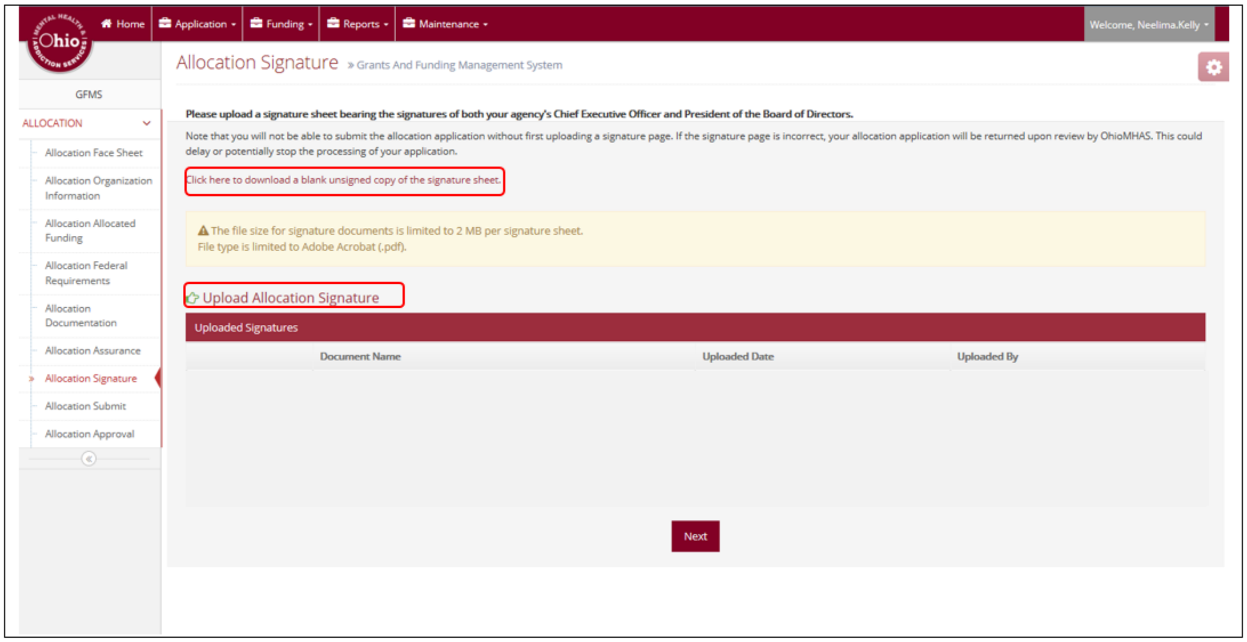
The Allocation Signature screen is where the unsigned copy of the signature sheet can be downloaded, signed, and the uploaded back into the application.

1. **Select** the Click Here link to download the signature sheet.

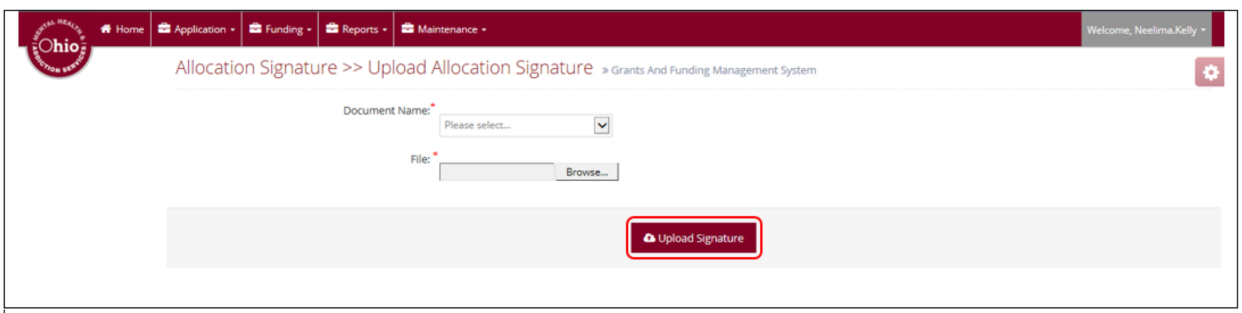
   Click here to download a blank unsigned copy of the signature sheet.

2. The signature sheet will be opened in a PDF format. **Print** the document, get it signed by the appropriate people, then **scan** and **save** the document to your computer.
3. To attach the signed Signature sheet to the application, **select** the Upload Allocation Signature link.

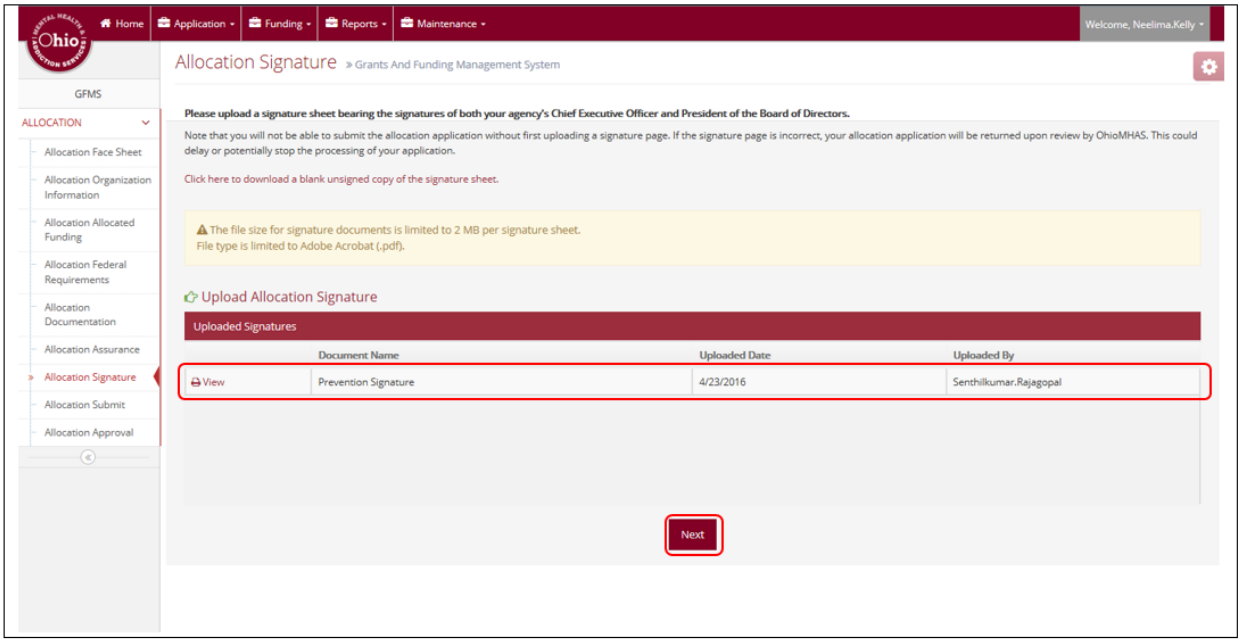
   Upload Allocation Signature



4. The Upload Allocation Signature pop-up window will appear.
5. **Input** the Document Name and Upload the signature document. **Click** on Upload Signature button. See the section in the user guide titled: ‘How to Attach Documents’ for detailed instructions.



6. The Signature Document will be listed in the “Uploaded Signatures” table as highlighted below in the snapshot:



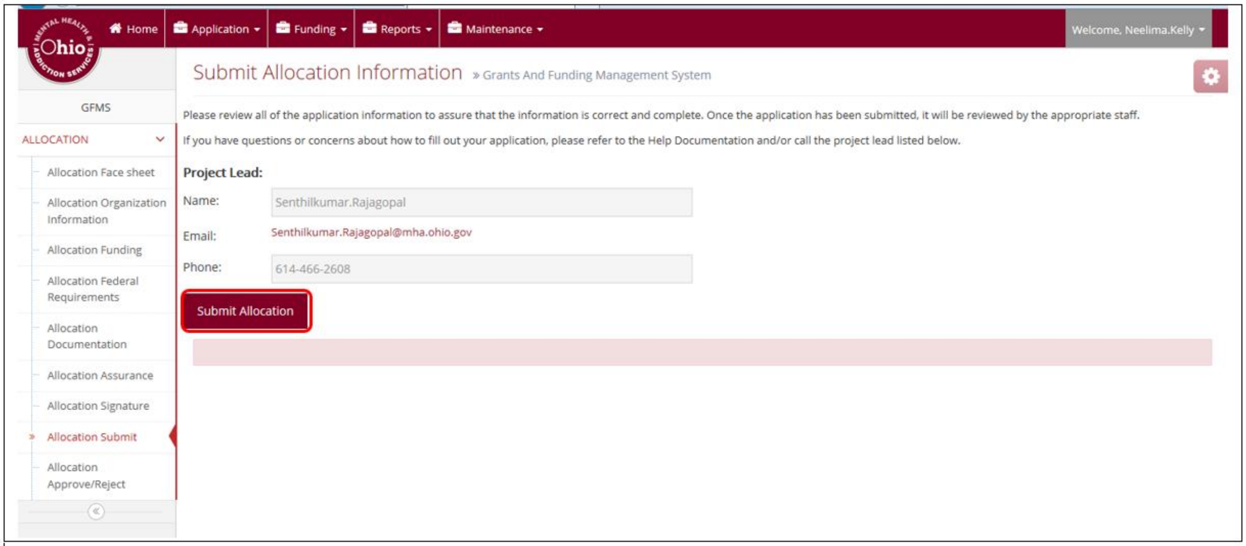
Please note the restrictions for uploading this signature document.

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

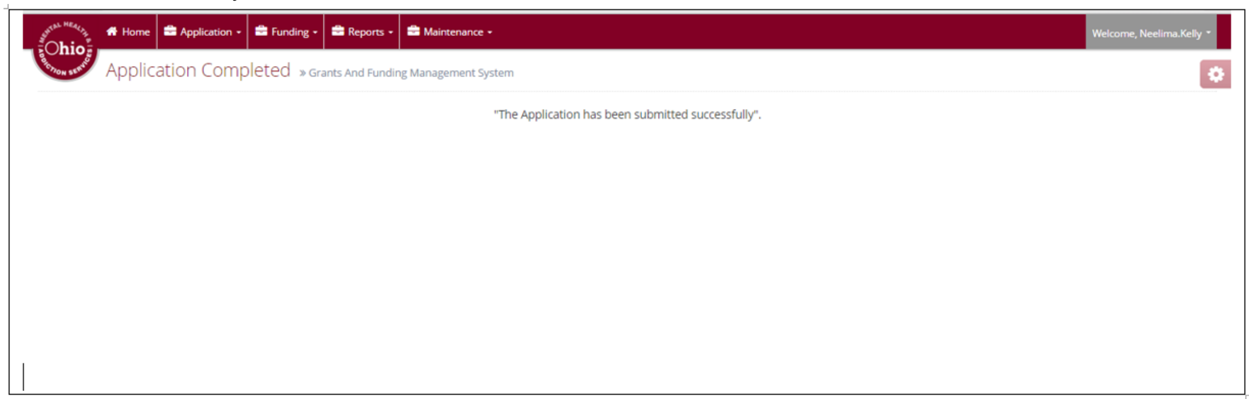
Allocation Submit

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.

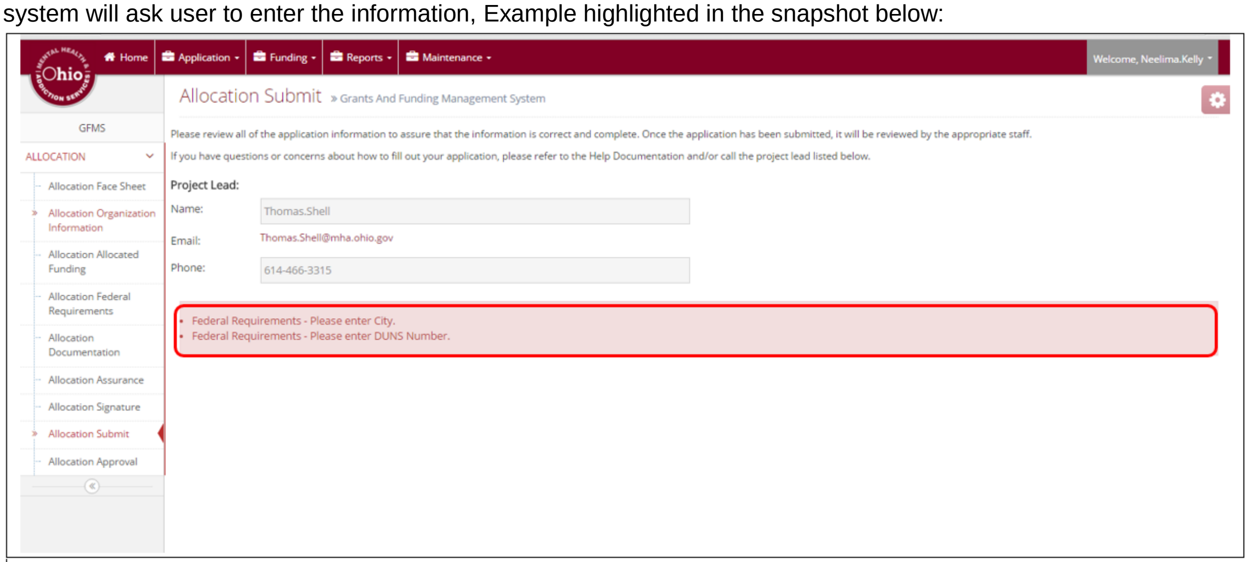
1. Select the Submit Application button.



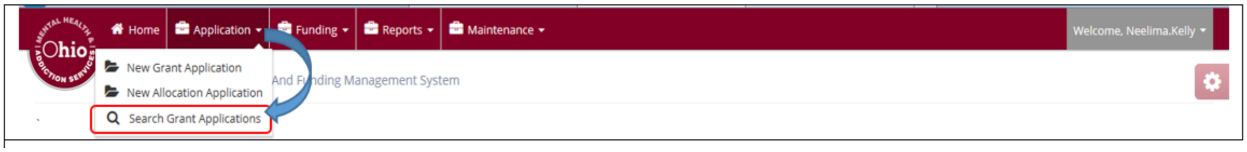
2.The system will display “Application Completed” screen where you can view a message “The Application has been submitted successfully”



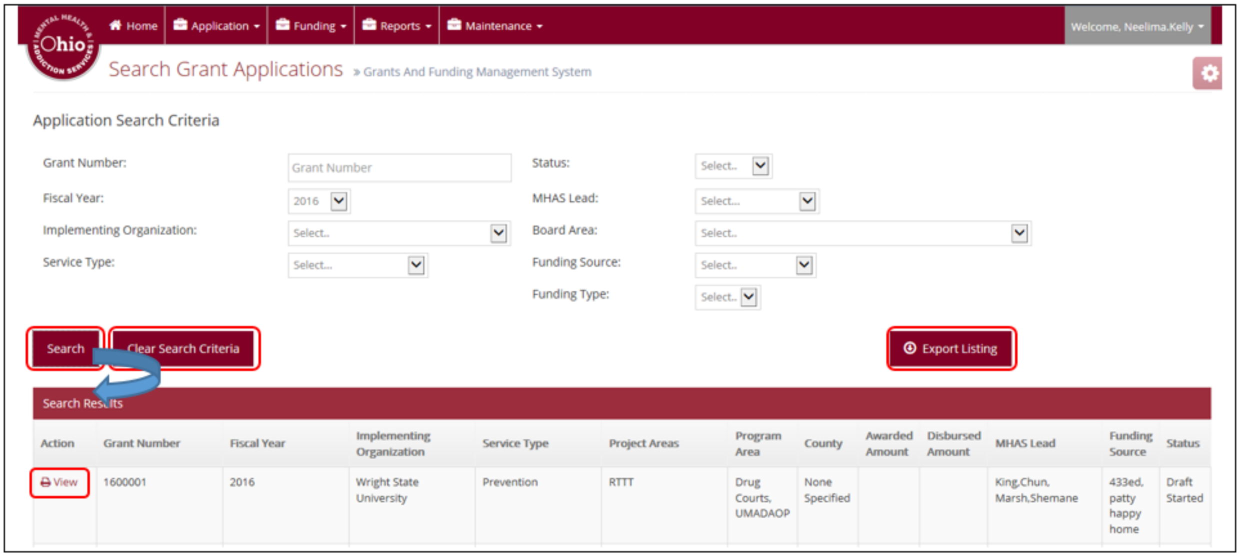
3. If the required information is not entered on the application pages and user **clicks** on Submit Allocation button, the system will ask user to enter the information, Example highlighted in the snapshot below:



1. Click on "Application" tab and select “Search Grant Applications” from the list.



2. The Search Grant Applications page will be displayed, consist of Search, Clear Search, Export Listing and View Functions as highlighted below in the snapshot:



3. **Select** the search criteria displayed on “Search Grant Applications” screen. All the search criteria’s (filters) are optional. If you change your mind, **click** on Clear Search Criteria button to clear search criteria’s.
4. **Click** on Search button displayed on the “Search Grant Applications” Screen. The search results grid will be displayed on the basis of selected search criteria’s.
5. If desired, you can **click** on Export Listing button to export search results to an excel spreadsheet.
6. If you want to view an application, **click** on View link displayed under Search Results grid as highlighted in the snapshot.

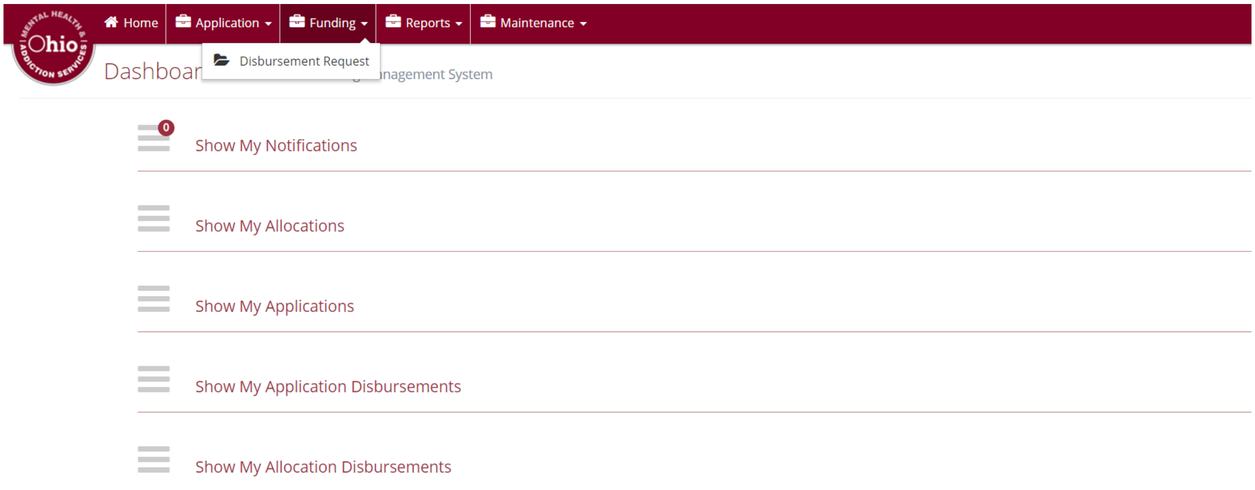
Funding Tab

Disbursement Request

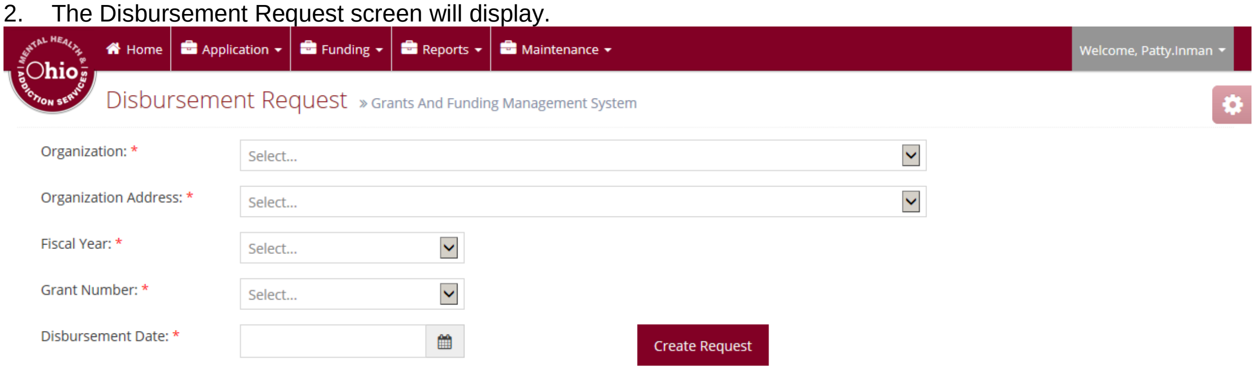
The Disbursement Request screen is where a user will request a disbursement for his grant funds.

Requesting a Disbursement

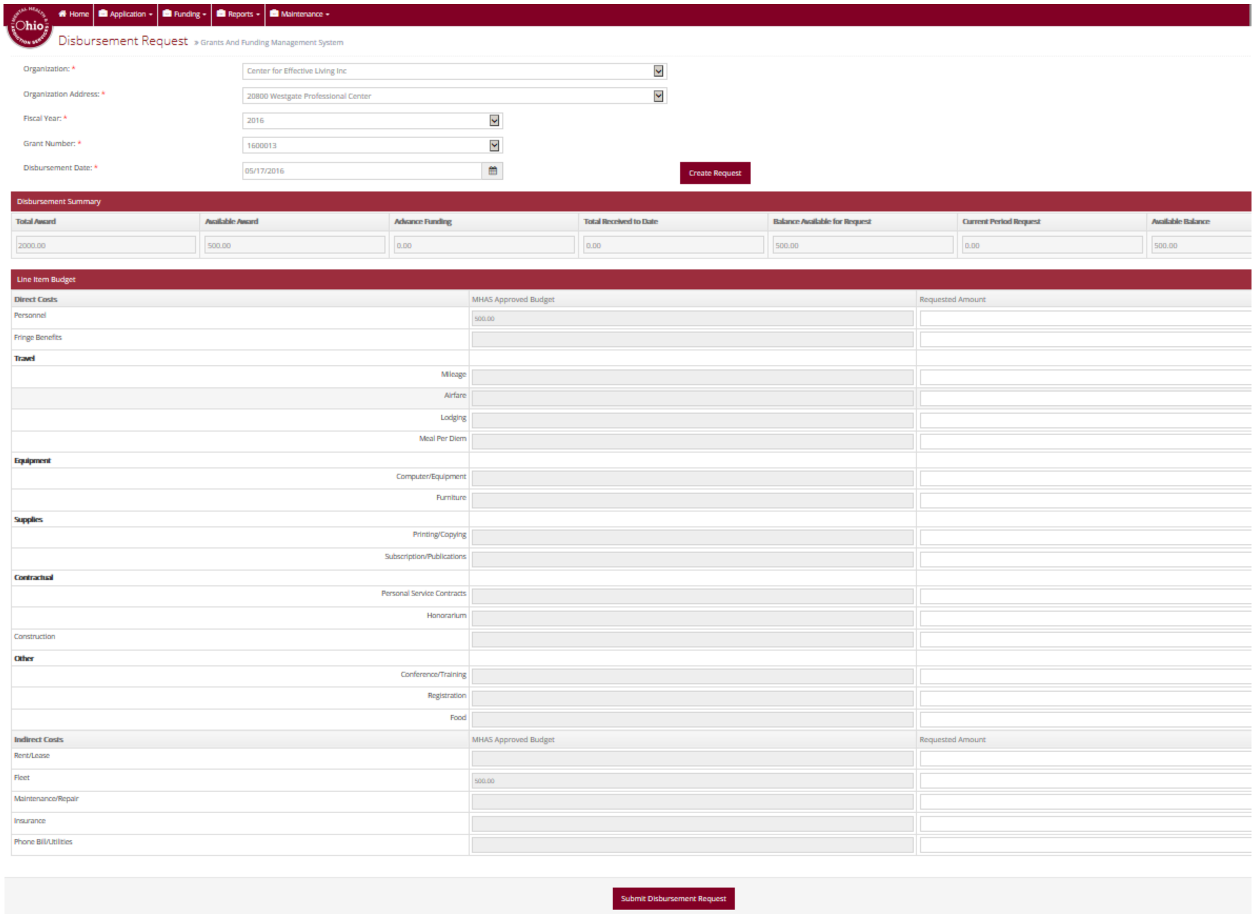
1. **Click** on Funding Tab and **select** “Disbursement Request” option from the list as highlighted below in the snapshot:



2. The Disbursement Request screen will display.



3. The Applicant will complete the information on the sceen and select the <u>Create Request</u> button. In order to request a disbursement, a NOSA must have been awarded.
4. On the Disbursement Request screen, input the 'Requested Amount' next to the budget item.
5. Select the <u>Submit Disbursement Request</u> button. A message will apprear on the screen indicating that the request was successfully submitted.
6. A notification will be sent to the OhoiMHAS Lead who will review the request.



Reports Tab

Grant Report

Under Construction

Expenditure Report

Under Construction

Maintenance Tab

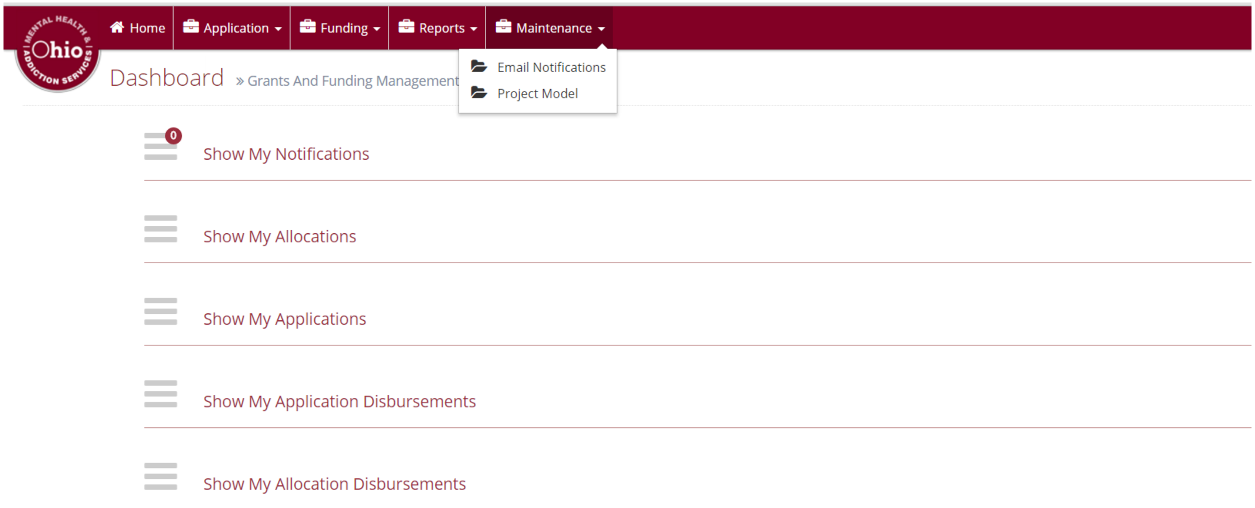
This section covers the maintenance items needed for an applicant to set email notifications and create project models.

Email Notification:

This is the section where user can select email notification in order to begin receiving emails whenever an item progresses through the workflow process.

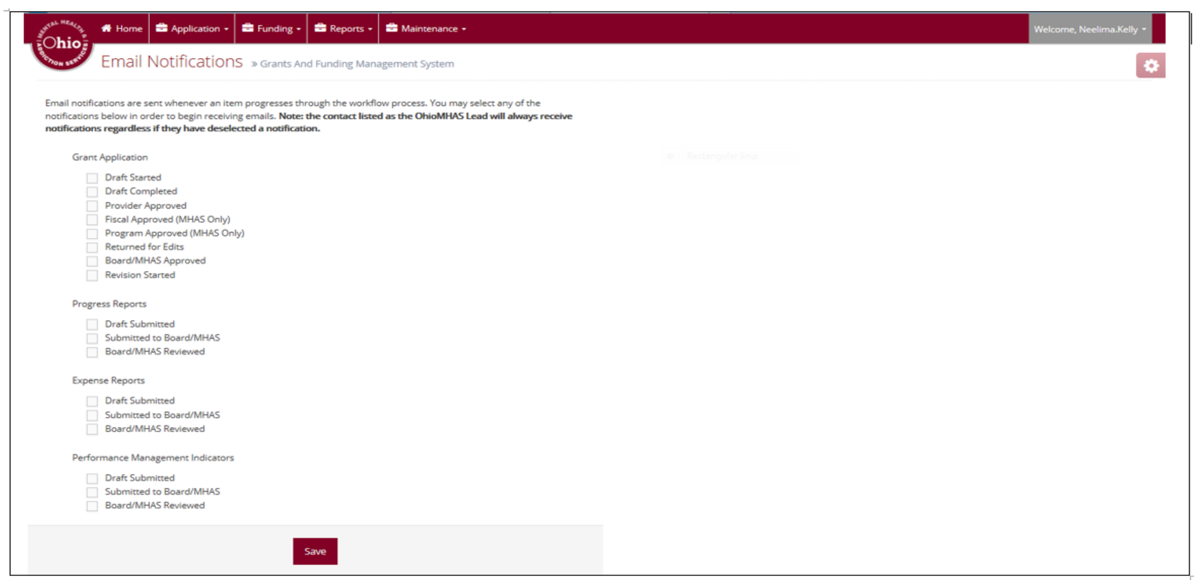
Navigate to "Email Notification" under Maintenance Tab:

1. Click on Maintenance Tab and select "Email Notification Preference" option from the list as displayed in the snapshot below:

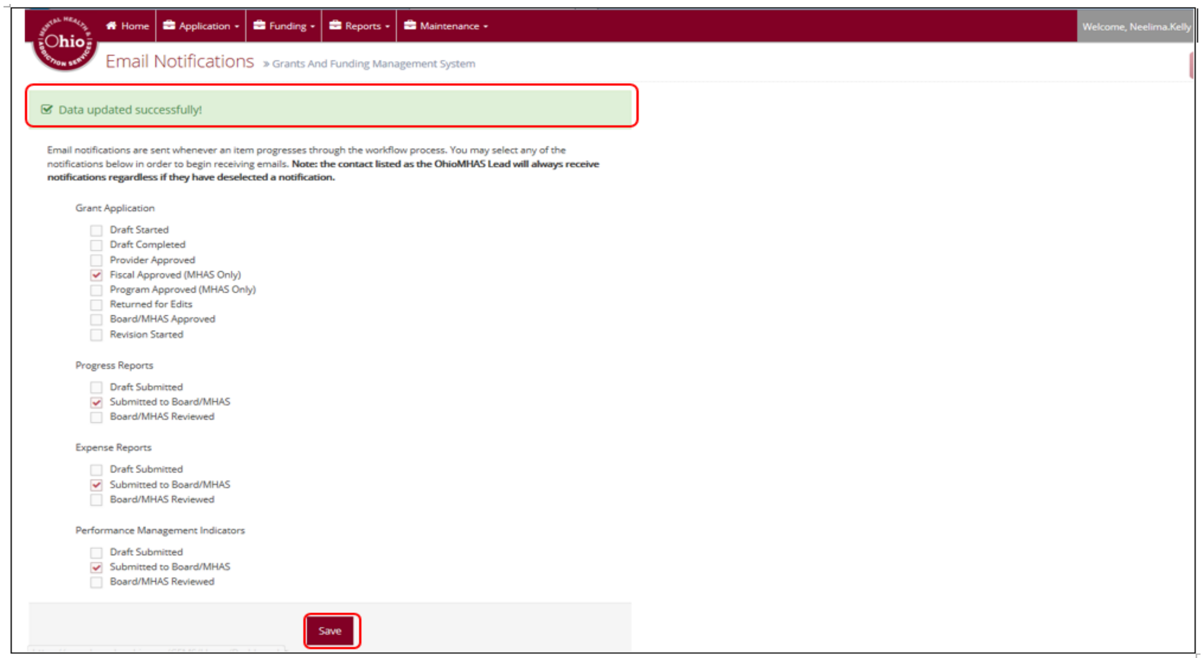


Display "Email Notifications" Screen:

1. **Select** any of the notifications to begin receiving email notifications.
2. **Click** on Save button.



3. When user **clicks** on Save button, an information message will be displayed "Data updated successfully" as highlighted below in the snapshot:

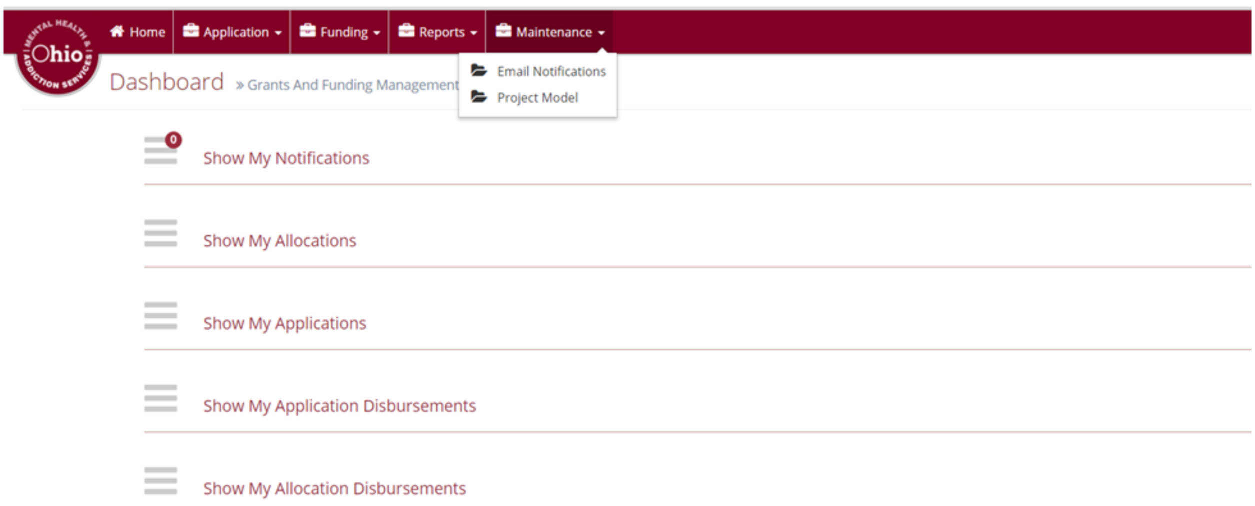


Project Model

This section provides internal user the ability to add, search and edit project model to the service, so that external user will have access to these values in completing their grant application.

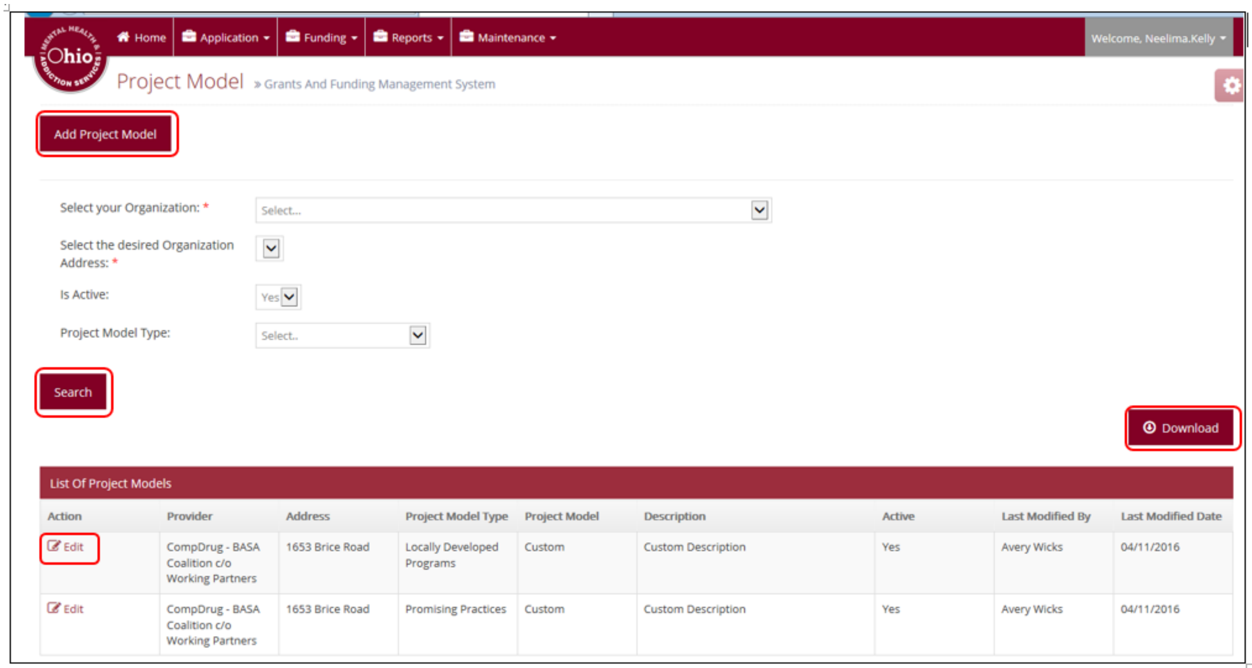
Navigate to "Project Model" under Maintenance Tab:

1. **Click** on Maintenance Tab and select "Project Model" option from the list as displayed in the snapshot below:



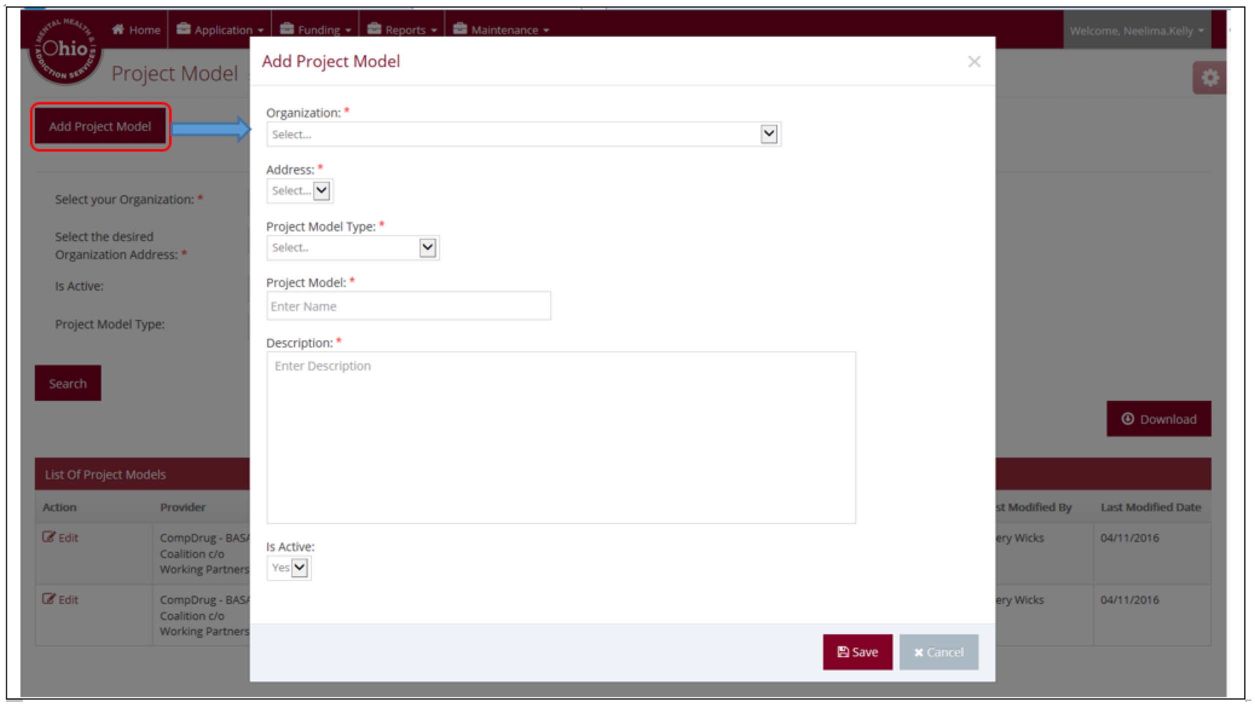
Displays "Project Model" Screen:

1. When internal user clicks on "Project Model" option, a "Project Model" screen will be displayed, consist of Add, Search, Edit and download Functions as highlighted below in the snapshot:



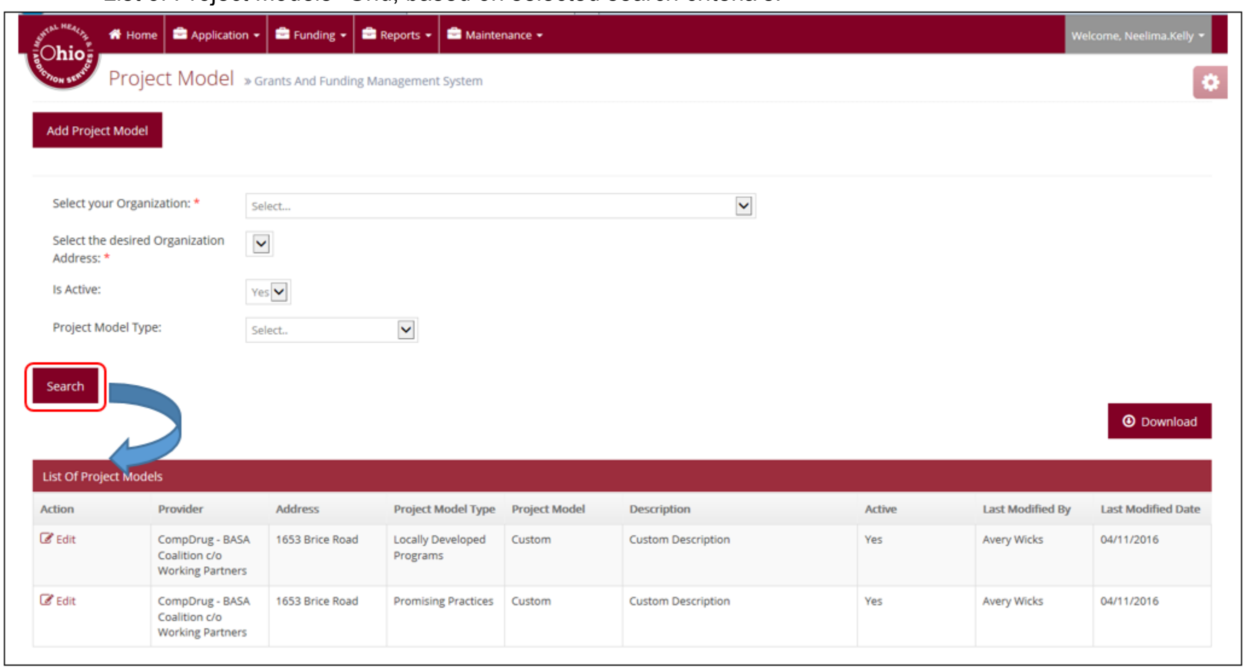
<u>Clicking on “Add Project Model” button- Display “Add Project Model” Pop-up window:</u>

1. **Click** on “<u>Add Project Model</u>” button on the Project Model Screen, an “Add Project Model” pop-up window will be displayed.
2. **Select** and **Enter** the information as indicated per each field displayed on the “Add Project Model” pop-up window. Fields with red asterisks * are required fields.
3. After all of the required information has been added, **click** on <u>Save</u> button to be taken to the next screen (Back to Project Model screen). If you change your mind, **click** on <u>Cancel</u> button, navigated back to the project model availability screen.



<u>Clicking on “Search” button- Display “List of Project Models” Grid:</u>

1. **Select** the search criteria’s displayed on “Project Model” screen. All the search criteria’s (filters) are optional.
2. **Click** on <u>Search</u> button displayed on the “Project Model” Screen. The search results will be displayed under “List of Project Models” Grid, based on selected search criteria’s.



If desired, you can **click** on <u>Download</u> button to export search results to an excel spreadsheet.

<u>Clicking on “Edit” link- Display “Update Project Model” Pop-up Window</u>

1. **Click** on <u>Edit</u> link displayed under “List of Project Models” Grid.

2. **Update** the fields as you want to update it. Fields with red asterisks * are required fields
3. **Click** on Save button to be taken to the next screen (Back to Project Model screen). If you change your mind, **click** on Cancel button, navigated back to project model screen.
4. This is the screen where you can inactivate an objective. If you want to inactivate it, **Select** “Is Active” option to No. This project model will be removed from the active records.