

GMIS Portal Progress Reporting Job Aid



Department of
Health

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Icon Key



1.0 Review Progress Report Overview

Some Solicitations may require applicants to fill out a workplan. The workplan section is where Agency users will enter details on how they plan to meet the Solicitation goals and objectives. The Progress Report is where the Agency will update ODH on their progress toward their workplan.



Workplan Goals vs. Objectives vs. Activities.

Goals, objectives, and activities work in a nested tree. A Goal is the overarching category. An Objective falls underneath a Goal. An Activity falls underneath an Objective and is an action you plan to carry out to fulfill the objective.

Sample Goal: By September 30, 2025, establish SNAP/EBT acceptance at the local farmers' market in priority community increasing fresh produce sales by 30% among residents living in xx census tract.

Sample Objective: Convene a Farmers' Market Subcommittee representative of both community organizations and residents.

Sample Activity: Recruit potential members through email, social media advertisements, and community events.

Example Workplan

Goal 1

Objective 1

Activity 1

Activity 2

Objective 2

Activity 3

Goal 2

Objective 1

Activity 1

Activity 2

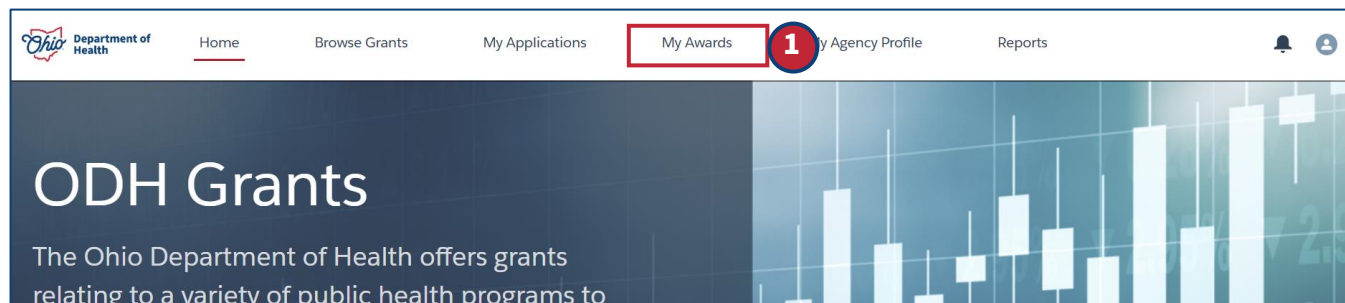
Objective 2

Activity 3

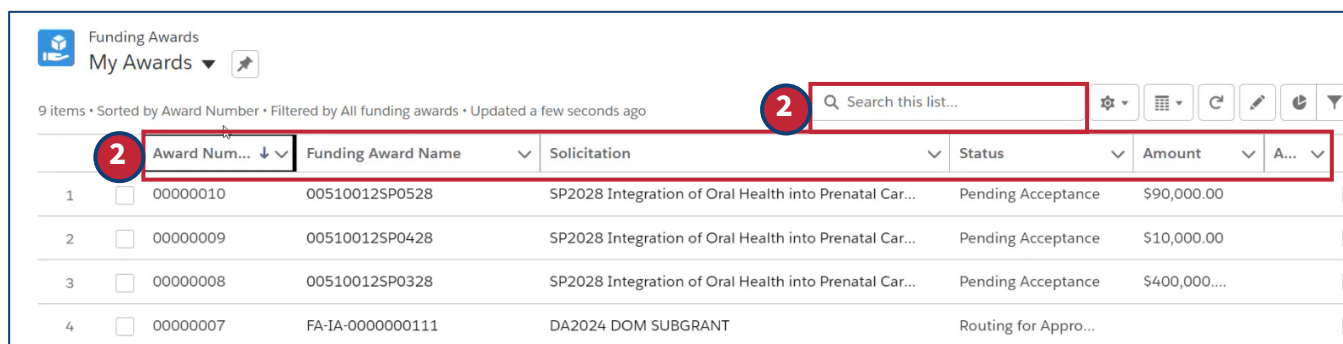
2.0 View Progress Reports

This Section Is Intended For: Primary Users, Secondary Users

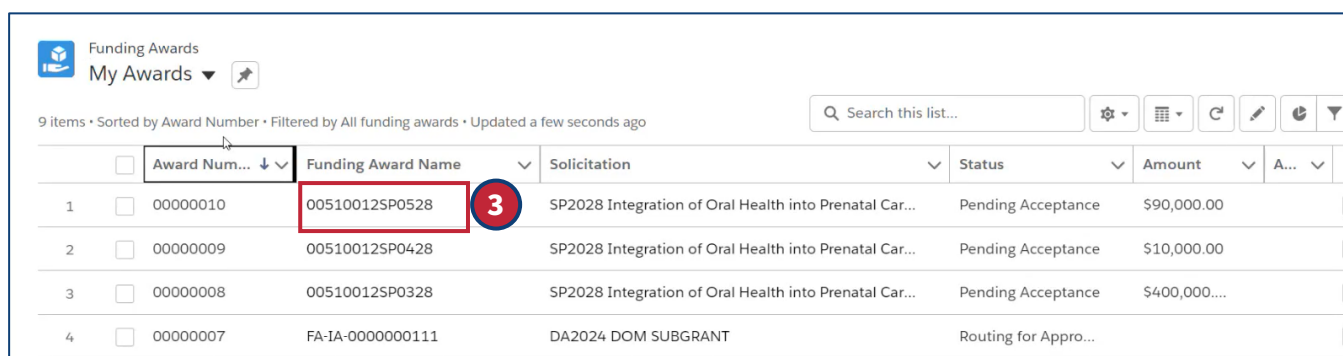
When a subrecipient user accepts the Funding Award, the GMIS Portal will create Progress Report records for the entire number of program reporting periods in the Solicitation. To view Progress Report records, first log into the GMIS portal. Subrecipients will view the Progress Report records on their funding award in the 'Progress Reports' tab.



1. Select 'My Awards'.



2. Search for the Award either through the Search Bar or using the navigation tabs to filter for desired award information.



3. Select the desired Funding Award Name for to open the award.

2.0 View Progress Reports (continued)

Funding Award
00510012SP0428

Accept / Decline NOA

Withdrawal

Programmatic Contact Person
Joe Barnard

Subrecipient
Athens County Health Department

Amount
\$125,000.00

Status
Funded

Details

Workplan

Budget

Expense Reports

Progress Reports

4 Deliverables

Tasks

Files

Funding Award Name
00510012SP0428

Solicitation
SP2028 Integration of Oral Health into Prenatal Care Program

Budget Period Start Date
7/1/2024

Status
Funded

Individual Application
IA-0000000133

Owner Name

Amount
\$125,000.00

Budget Period End Date
6/30/2025

Programmatic Contact Person
Joe Barnard

Subrecipient
Athens County Health Department

4. Select the 'Progress Reports' tab.

The Progress Reports tab will load all the Progress Report records for the entire reporting period selected in the Solicitation, whether it is monthly, quarterly, bi-annually, or yearly.

Funding Award

Accept / Decline NOA

Request Withdrawal

Programmatic Contact Person
Primary User Training

Subrecipient
Brown County Health Department

Amount
\$10,000.00

Status
Funded

Details

Workplan

Budget

Expense Reports

Progress Reports

Deliverables

Tasks

Files

Forms

5 Progress Report

Name	Reporting Period Start Date	Reporting Period End Date	Status	Due Date
Month 1 2025 Progress Report	Aug 26, 2024	Sep 25, 2024	Approved	Oct 5, 2024
Month 2 2025 Progress Report	Sep 26, 2024	Oct 25, 2024	Draft	Nov 5, 2024
Month 3 2025 Progress Report	Oct 26, 2024	Nov 25, 2024	Draft	Dec 5, 2024
Month 4 2025 Progress Report	Nov 26, 2024	Dec 2, 2024	Draft	Jan 5, 2025

5. View the Progress Report Name.



Do you see a different name and descriptions?

The Progress Report Name and Description is automatically generated from the reporting period. For example, monthly reports are named "Month + # + Year + Progress Report" such as "Month 1 2024 Progress Report". However, quarterly reports are named "Quarter + # + Year + Progress Report" such as "Quarter 3 2024 Progress Report".

2.0 View Progress Reports (continued)

The Progress Reports tab will load all the Progress Report records for the entire reporting period selected in the Solicitation, whether it is monthly, quarterly, bi-annually, or yearly.

Name	Reporting Period Start Date	Reporting Period End Date	Status	Due Date	
Month 1 2025 Progress Report	Aug 26, 2024	Sep 25, 2024	Approved	Oct 5, 2024	▼
Month 2 2025 Progress Report	Sep 26, 2024	Oct 25, 2024	Draft	Nov 5, 2024	▼
Month 3 2025 Progress Report	Oct 26, 2024	Nov 25, 2024	Draft	Dec 5, 2024	▼
Month 4 2025 Progress Report	Nov 26, 2024	Dec 2, 2024	Draft	Jan 5, 2025	▼

6. View the Reporting Period Start Date. This is the first date of the progress report period.
7. View the Reporting Period End Date . This is the last date of the progress report period.
8. View the Status. This shows the progress report as Draft, In Progress, In Review, Approved, or Rejected.
9. View the Due Date. This is the date and time the progress report must be submitted by.
10. Select arrow to open the Progress Report. 'Edit' will be an option when the Progress Report is in Draft, In Progress or Rejected status. 'Edit' will switch to 'View' once the Progress Report is In Review or Approved status.



Reminder to complete your Workplan revisions!

If ODH is requiring you to make a Workplan revision, you'll find the request under 'Tasks' within your Funding Award. Otherwise, Workplan revisions can happen at any time by going to the Workplan tab within the Funding Award and selecting the 'New Workplan Revision' button.

This is the conclusion of **2.0 View Progress Reports**.

3.0 Complete Progress Reports

This Section Is Intended For: Primary Users, Secondary Users

3.1 Progress Reports for System Generated Workplans

If a Subrecipient is using a System-Generated Workplan, they will be able to load the Progress Report that mimics the workplan.

The screenshot shows the 'Progress Reports' tab selected in the navigation menu. The page displays a table of progress reports for the funding award 00510012SP2725. The table has columns for Name, Period Start Date, Period End Date, Status, Due Date, and an 'Edit' button. A red circle with the number '1' highlights the 'Edit' button for the first row, 'Month 1 2024 Progress Report'.

Name	Period Start Date	Period End Date	Status	Due Date	
Month 1 2024 Progress Report	08/01/2024	08/31/2024	Draft	09/05/2024	Edit
Month 2 2024 Progress Report	09/01/2024	09/30/2024	Draft	10/05/2024	Edit
Month 3 2024 Progress Report	10/01/2024	10/31/2024	Draft	11/05/2024	Request Extension Edit
Month 4 2024 Progress Report	11/01/2024	11/30/2024	Draft	12/05/2024	Request Extension Edit
Month 5 2024 Progress Report	12/01/2024	12/31/2024	Draft	01/05/2025	Request Extension Edit

1. Select 'Edit' to open the Progress Report.

The screenshot shows the 'Progress Report Workplan Details' page with the 'Workplan' tab selected. A red circle with the number '2' highlights the 'FA-IA-0000000221 Workplan' entry in the list. The entry is expanded, showing its details: Name: FA-IA-0000000221 Workplan, Status: Active, and Description: New Workplan Description. Below the list, there is a button labeled 'Edit Goal Progress'.

Progress Report Workplan Details

Workplan Chatter

- FA-IA-0000000221 Workplan
 - Name: FA-IA-0000000221 Workplan
 - Status: Active
 - Description: New Workplan Description
- FA-Improve oral health and hygiene

[Edit Goal Progress](#)

[Cancel](#) [Submit](#)

2. Review the Workplan Overview section. This contains the workplan name, status, and description that was created for the entire workplan.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

Progress Report Workplan Details

Workplan

Chatter

▼ FA-IA-0000000221 Workplan

Name: FA-IA-0000000221 Workplan

Status: Active

Description: New Workplan Description

3

▼ FA-Improve oral health and hygiene

Description: To improve oral health and hygiene outcomes for underserved populations within the county by increasing access to preventive dental services, education, and community outreach. DEMO UPDATED

SMARTIE: true

4

> FA-Increase Access to Preventive Dental Services

> FA-Enhance Oral Health Education and Awareness

Edit Goal Progress

Edit Objective Progress

Edit Objective Progress

Cancel

Submit



Recall: Goals, Objectives, and Activities are in a nested tree!

Goals, objectives, and activities work in a nested tree. A Goal is the overarching category. An Objective falls underneath a Goal. An Activity falls underneath an Objective and is an action you plan to carry out to fulfill the objective.

3. Select the arrow to expand the workplan and view details underneath.
4. Continue to select arrows to expand view of other goals, objectives, and activities, as needed.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

To provide a progress report update for a **Goal**:

Progress Report Workplan Details

Workplan

Chatter

FA-IA-0000000221 Workplan

Name: FA-IA-0000000221 Workplan

Status: Active

Description: New Workplan Description

FA-Improve oral health and hygiene

Description: To improve oral health and hygiene outcomes for underserved populations within the county by increasing access to preventive dental services, education, and community outreach. DEMO UPDATED

SMARTIE: true

Edit Goal Progress

5. Select 'Edit Goal'.

Goal Progress Report Update

Details

Goal Name

FA-Improve oral health and hygiene

Description

To improve oral health and hygiene outcomes for underserved p

Smartie

☒

Goal Met ?

☐

Narrative

Cancel

Save

6. Review Goal Name and Description. This matches what was inputted in the original workplan.

7. Select the 'Goal Met?' checkbox, if applicable.

8. Enter a Narrative description to provide an update on Goal progress.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

Goal Progress Report Update

Details

Goal Name
FA-Improve oral health and hygiene

Description
To improve oral health and hygiene outcomes for underserved p

Smartie
☒

Goal Met ?
☐

Narrative

Cancel
Save
9



Here are best practices for a Goal Narrative:

Please write a detailed description of progress on your Goal. Write about your processes, such as conversations you've had with partners, or what may or may not have worked, etc. The report is your opportunity to show the great work you've done, regardless if a Goal has been completed. Focus on quality of content instead of quantity. Some Goals will need less reporting than others. When writing your notes, write as if the reader is unfamiliar with your work. This will ensure that the progress you've made on your Goals is properly explained and communicated. Additionally, please indicate if you encountered new opportunities or challenges. If challenges, please provide the potential solution(s). The maximum character limit is 3200.

9. Select 'Save'.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

To provide a progress report update for an **Objective**:

Progress Report Workplan Details

Workplan
Chatter

FA-IA-0000000221 Workplan

Name: FA-IA-0000000221 Workplan
Status: Active
Description: New Workplan Description

FA-Improve oral health and hygiene

Description: To improve oral health and hygiene outcomes for underserved populations within the county by increasing access to preventive dental services, education, and community outreach. DEMO UPDATED
SMARTIE: true

Edit Goal Progress

FA-Increase Access to Preventive Dental Services

Description: Increase Access to Preventive Dental Services by completing the activities related to improve overall oral health and hygiene.
Key Indicator: Key indicator is number of prevention centers and clinic
External Partner:

Edit Objective Progress

10. Select 'Edit Objective'.

Objective Progress Report Update

Details

Objective Name
FA-Increase Access to Preventive Dental Services

Due Date
2/28/2025

Objective Description
Increase Access to Preventive Dental Services by completing the

Key External Partner

Key Indicator
Key indicator is number of prevention centers and clinic

Planned Completion Date
I

Narrative

Cancel
Save

11. Review Objective Name and Description details. This matches what was inputted in the original workplan.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

Objective Progress Report Update

Details

Objective Name	Due Date
FA-Increase Access to Preventive Dental Services	2/28/2025
Objective Description	Key External Partner
Increase Access to Preventive Dental Services by completing the	
Key Indicator	Planned Completion Date
Key indicator is number of prevention centers and clinic	I

Narrative

Cancel Save

12. Enter the Planned Completion Date or select the date from the calendar icon.

13. Enter a Narrative description to provide an update on Objective progress.



Here are best practices for an Objective Narrative:

Please write a detailed description of progress on your Objective. Write about your processes, such as conversations you've had with partners, or what may or may not have worked, etc. The report is your opportunity to show the great work you've done, regardless if an Objective has been completed. Focus on quality of content instead of quantity. Some Objectives will need less reporting than others. When writing your notes, write as if the reader is unfamiliar with your work. This will ensure that the progress you've made on your Objectives are properly explained and communicated. Additionally, please indicate if you encountered new opportunities or challenges. If challenges, please provide the potential solution(s). The maximum character limit is 3200.

14. Select 'Save'.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

To provide a progress report update for an **Activity**:



Progress Report Workplan Details

▼ FA-Improve oral health and hygiene Edit Goal

Description: To improve oral health and hygiene outcomes for underserved populations within the county by increasing access to preventive dental services, education, and community outreach. DEMO UPDATED
SMARTIE: true

▼ FA-Increase Access to Preventive Dental Services Edit Objective Progress

Description: Increase Access to Preventive Dental Services by completing the activities related to improve overall oral health and hygiene.
Key Indicator: Key indicator is number of prevention centers and clinic
External Partner:
Due Date: 02/27/2025

Activity Name ▼	Proposed Star... ▼	Proposed Co... ▼	Key Personnel ▼	Plan to Evalua... ▼	
FA-Activity 1.2: Or...	11/30/2024	02/27/2025	Local schools and ...	Total number of ev...	 15
FA-Activity 1.1: Par...	12/31/2024	02/27/2025	Local Clinics	Total the number ...	

15. Select the Pencil Icon to open the Activity.

Activity Progress Report Update

Details


Activity name
FA-Activity 1.2: Organize quarterly dental screening events


Key Personnel
Local schools and community centers

Plan to Evaluate Activity
Total number of events completed in local schools and event cer

Proposed Start Date
12/1/2024

Proposed Completion Date
2/28/2025

Planned Completion Date 

Completed Date 

Narrative

16. Review Activity Name and Description details. This matches what was inputted in the original workplan.

3.0 Complete Progress Reports (continued)

3.1 Progress Reports for System Generated Workplans (continued)

Activity Progress Report Update

Details

Activity name
FA-Activity 1.2: Organize quarterly dental screening events

<p>Key Personnel Local schools and community centers</p> <p>Proposed Start Date 12/1/2024</p>	<p>Plan to Evaluate Activity Total number of events completed in local schools and event cer</p> <p>Proposed Completion Date 2/28/2025</p>
---	--

Planned Completion Date

17
📅

Completed Date

18
📅

Narrative

19

Cancel
Save
20

17. Enter the Planned Completion Date or select the date from the calendar icon.
18. Enter the Completed Date, if applicable, or select the date from the calendar icon.
19. Enter a Narrative description to provide an update on Activity progress.



Here are best practices for an Activity Narrative:

Please write a detailed description of progress on your Activity. Write about your processes, such as conversations you've had with partners, or what may or may not have worked, etc. The report is your opportunity to show the great work you've done, regardless if an Activity has been completed. Focus on quality of content instead of quantity. Some Activities will need less reporting than others. When writing your notes, write as if the reader is unfamiliar with your work. This will ensure that the progress you've made on your Activities are properly explained and communicated. Additionally, please indicate if you encountered new opportunities or challenges. If challenges, please provide the potential solution(s). The maximum character limit is 3200.

20. Select 'Save'.


Once all Goals, Objectives, and Activities are updated, the Agency Primary User can submit the Progress Report. To submit, jump to section **3.4 Submit Progress Reports**.

This is the conclusion of **3.1 Progress Reports for System Generated Workplans**.

3.0 Complete Progress Reports (continued)

3.2 Progress Reports for Non-System Generated Workplans

For Non-System Generated Workplans, Subrecipients can upload external files to submit on their Progress Report.


Funding Award
00510011BA0224

[Accept / Decline NOA](#)
[Request Withdrawal](#)


Programmatic Contact Person
Joe Barnard

Subrecipient
Athens County Health Department

Amount
\$1,000.00

Status
Funded

Details Workplan Budget Expense Reports **Progress Reports** Deliverables Tasks Files


Progress Report

Name	Period Start Date	Period End Date	Status	Due Date		
Month 1 2024 Progress Report	08/19/2024	09/18/2024	Draft	10/05/2024		1 Edit
Month 2 2024 Progress Report	09/19/2024	10/18/2024	Draft	11/05/2024	Request Extension	Edit
Month 3 2024 Progress Report	10/19/2024	11/18/2024	Draft	12/05/2024	Request Extension	Edit
Month 4 2024 Progress Report	11/19/2024	12/18/2024	Draft	01/05/2025	Request Extension	Edit
Month 5 2024 Progress Report	12/19/2024	01/18/2025	Draft	02/05/2025	Request Extension	Edit
Month 6 2025 Progress Report	01/19/2025	02/19/2025	Draft	03/05/2025	Request Extension	Edit

1. Select 'Edit' to open the Progress Report.

Progress Report Workplan Details

[Workplan](#)
[Chatter](#)

Upload Files

2 [Upload Files](#) Or drop files

3 Enter your comment here

[Cancel](#)
4 [Submit](#)

2. Select 'Upload Files' button to search for a saved file or drag and drop the file into the box.
3. Enter any comments, if applicable.
4. Select 'Submit'.

3.0 Complete Progress Reports (continued)

3.2 Progress Reports for Non-System Generated Workplans (continued)



You can submit multiple files.

The system supports the upload of multiple files, if needed.

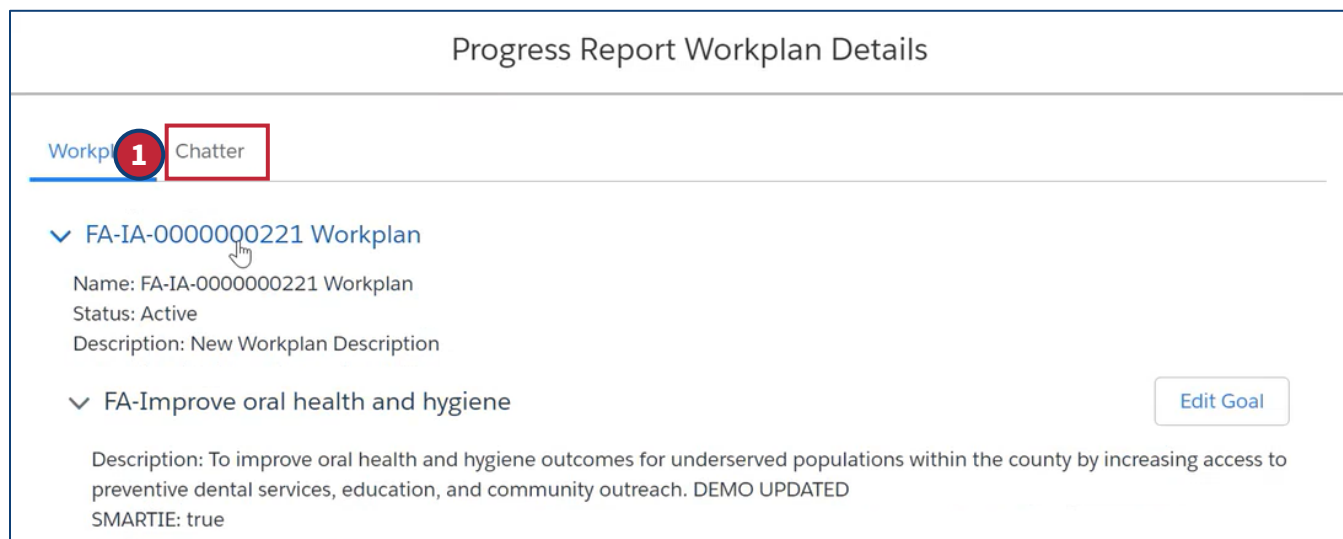
Once all Progress Report file(s) have been uploaded, the Agency Primary User can submit the Progress Report. To submit, jump to section **3.4 Submit Progress Reports**.

This is the conclusion of **3.2 Progress Reports for Non-System Generated Workplans**.

3.0 Complete Progress Reports (continued)

3.3 Chatter for Progress Reports

When working on a Progress Report, there's a helpful tool subrecipients should be using to communicate with ODH - Chatter. Chatter is a built-in messaging system within GMIS Portal that allows subrecipients to easily communicate with ODH. This is where subrecipients can ask questions, request clarifications, or discuss any items that may need further explanation.



Progress Report Workplan Details

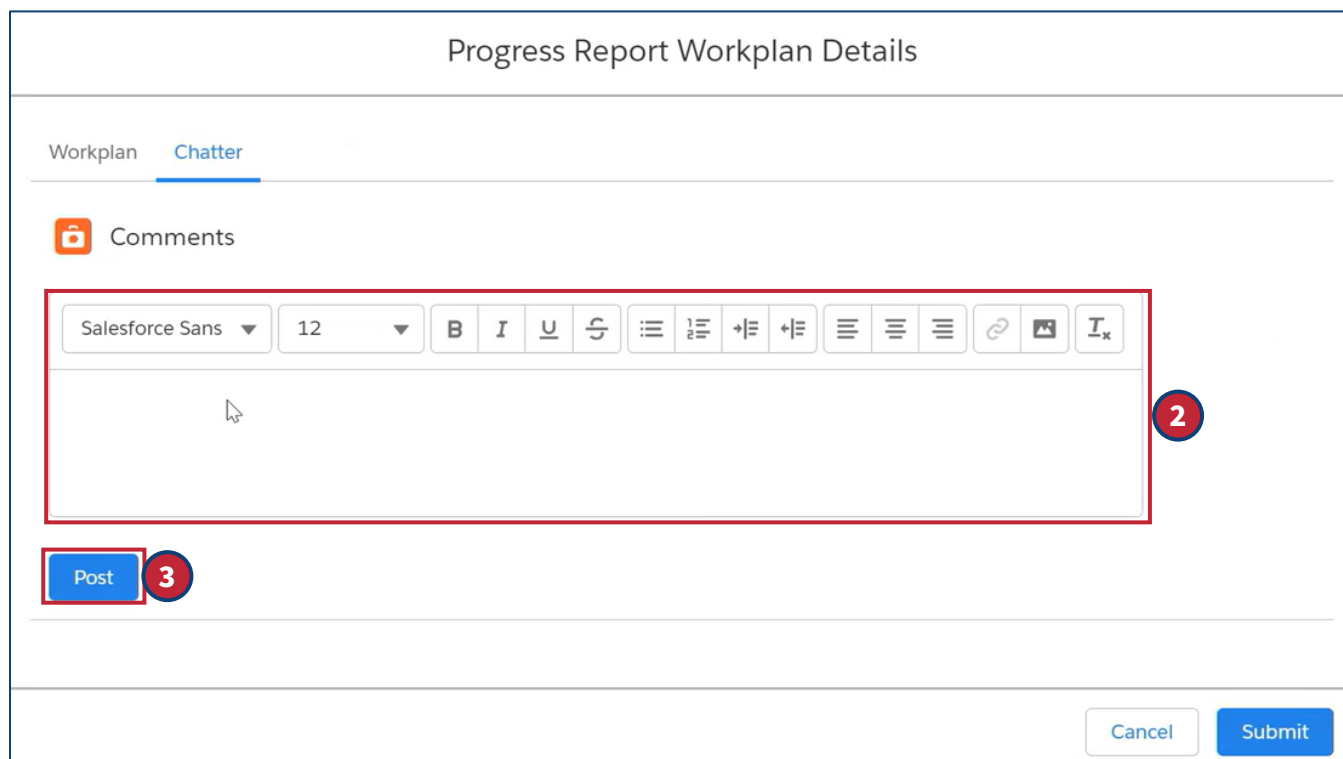
Workplan **1** Chatter

✓ FA-IA-0000000221 Workplan
 Name: FA-IA-0000000221 Workplan
 Status: Active
 Description: New Workplan Description

✓ FA-Improve oral health and hygiene Edit Goal


Description: To improve oral health and hygiene outcomes for underserved populations within the county by increasing access to preventive dental services, education, and community outreach. DEMO UPDATED
 SMARTIE: true




















1. Select 'Chatter' tab within the Progress Report.



Progress Report Workplan Details

Workplan Chatter

 Comments

Salesforce Sans 12 **B** **I** U                   




















3.0 Complete Progress Reports (continued)

3.3 Chatter for Progress Reports (continued)

Progress Report Workplan Details

4 Workplan Chatter

Comments

Salesforce Sans 12 B I U                   

3.0 Complete Progress Reports (continued)

3.4 Submit Progress Reports

**You cannot submit until after Reporting Period End Date.**

Subrecipients can edit the progress reports at any time prior to submission.

**Once a Progress Report is submitted, it is locked!**

Once the Progress Report is Submitted, the record is locked and Subrecipients cannot continue editing. Please be sure the information is correct prior to submitting the Progress Report, as any adjustments or errors will not be able to be corrected until the next Progress Report.

Progress Report Workplan Details

Workplan Chatter

FA-IA-0000000221 Workplan

Name: FA-IA-0000000221 Workplan

Status: Active

Description: New Workplan Description

FA-Improve oral health and hygiene

Edit Goal

Cancel Submit

Review and verify all inputted values prior to submitting the Progress Report. Confirm progress has been inputted for all goals, objectives, and activities as outlined in sections 3.1-3.3. Once ready to submit:

1. Select 'Submit' button.

Progress Report Submission

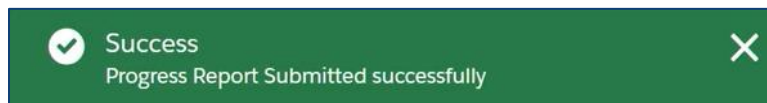
Please select the 'Submit' button on this screen to confirm that you would like to submit this Progress Report for review. Once submitted, the progress report will be in read only status.

Cancel Submit

2. Review the terms and conditions of submitting.
3. Select 'Cancel' to exit out of Progress Report submission.
4. Select 'Submit' to proceed with the Progress Report submission.

3.0 Complete Progress Reports (continued)

3.4 Submit Progress Reports (continued)



Once submitted, a Success message will display at the top of the GMIS Portal. Please note there are validations built into the system to ensure correctness for the progress report. If an error message is received, please adjust the progress report according to error instructions and resubmit, as needed.

 The screenshot shows the GMIS Portal interface for a specific funding award. At the top, it displays the funding award number "00510012SP2725" and buttons for "Accept / Decline NOA" and "Request Withdrawal". Below this, it lists the programmatic contact person as "Joe Barnard", the subrecipient as "Athens County Health Department", the amount as "\$1,000.00", and the status as "Funded". A navigation bar includes tabs for "Details", "Workplan", "Budget", "Expense Reports", "Progress Reports" (which is active), "Deliverables", "Tasks", and "Files". The "Progress Reports" section contains a table with the following data:

Name	Period Start Date	Period End Date	Status	Due Date	
Month 1 2024 Progress Report	08/01/2024	08/31/2024	In Review	05/2024	▼
Month 2 2024 Progress Report	09/01/2024	09/30/2024	Draft	10/05/2024	▼
Month 3 2024 Progress Report	10/01/2024	10/31/2024	Draft	11/05/2024	Request Extension ▼

 Red boxes and numbers highlight specific elements: a red box around the "In Review" status is labeled with a red circle containing the number "5", and a red box around the dropdown arrow in the first row is labeled with a red circle containing the number "6".

5. View the Status as 'In Review' after submission.

To view the details of a submitted Progress Report:

6. Select the dropdown arrow to the right of the Progress Report and select 'View'.

This will open a screen displaying the Progress Report Record and its resulting category values, however, the screen will be view-only. No additional edits can be made to the Progress Report following submission.

This is the conclusion of **3.4 Submit Progress Reports**.

3.0 Complete Progress Reports (continued)

3.5 Progress Report Approval

Once submitted, ODH staff will immediately be alerted of the Subrecipient progress report pending approval. Once the progress report has been reviewed, finalized, and approved by ODH – the status will update to ‘Approved’ on the Funding Award.

Funding Award

Programmatic Contact Person: Primary User Training Subrecipient: Brown County Health Department Amount: \$10,000.00 Status: Funded

Accept / Decline NOA Request Withdrawal

Details Workplan Budget Expense Reports **Progress Reports** Deliverables Tasks Files Forms

Progress Report

Name	Reporting Period Start Date	Reporting Period End Date	Status	Due Date
Month 1 2025 Progress Report	Aug 26, 2024	Sep 25, 2024	1 Approved	Oct 5, 2024
Month 2 2025 Progress Report	Sep 26, 2024	Oct 25, 2024	Draft	Nov 5, 2024
Month 3 2025 Progress Report	Oct 26, 2024	Nov 25, 2024	Draft	Dec 5, 2024

1. View the Status as ‘Approved’.

This is the conclusion of **3.5 Progress Report Approval**.

3.6 Progress Report Rejection & Resubmission

In some circumstances, a progress report may be rejected by ODH. ODH will communicate any changes through Chatter, and request updates to be made to the progress report.

Funding Award

Programmatic Contact Person: Primary User Training Subrecipient: Brown County Health Department Amount: \$10,000.00 Status: Funded

Accept / Decline NOA Request Withdrawal

Details Workplan Budget Expense Reports **Progress Reports** Deliverables Tasks Files Forms

Progress Report

Name	Reporting Period Start Date	Reporting Period End Date	Status	Due Date
Month 1 2025 Progress Report	Aug 26, 2024	Sep 25, 2024	1 Rejected	Oct 5, 2024
Month 2 2025 Progress Report	Sep 26, 2024	Oct 25, 2024	Draft	Nov 5, 2024

1. View the Status as ‘Rejected’.
2. Select ‘Edit’ to begin the revision process.

The subrecipient will then have to complete the edits and re-submit the report, through the same process outlined in sections **3.1-3.3**.

This is the conclusion of **3.6 Progress Report Rejection & Resubmission**.

This is the conclusion of **3.0 Complete Progress Reports**.

4.0 Request Progress Report Extension

On the Progress Reports Tab list view on the Funding Award, Subrecipients can click the 'Request Extension' button to initiate the extension request for a Progress Report.



There are limitations on Extension Requests.

A Request for Extension can only be initiated until the last day of the reporting period end date. Once the end of the reporting period is reached, the 'Request Extension' button disappears.

Funding Award

Programmatic Contact Person: Primary User Training Subrecipient: Brown County Health Department Amount: \$50,000.00 Status: Funded

Details Workplan Budget Expense Reports **Progress Reports** Deliverables Tasks Files Forms

Progress Report

Name	Reporting Period Start Date	Reporting Period End Date	Status	Due Date
Month 1 2025 Progress Report	Dec 1, 2024	Dec 31, 2024	In Progress	Jan 5, 2025
Month 2 2025 Progress Report	Jan 1, 2025	Jan 31, 2025	Draft	Feb 5, 2025
Month 3 2025 Progress Report	Feb 1, 2025	Feb 28, 2025	Draft	Mar 5, 2025
Month 4 2025 Progress Report	Mar 1, 2025	Mar 31, 2025	Draft	Apr 5, 2025
Month 5 2025 Progress Report	Apr 1, 2025	Apr 30, 2025	Draft	May 5, 2025

1. Select the dropdown arrow and 'Request Extension' on the desired Progress Report.

1. Select the dropdown arrow and 'Request Extension' on the desired Progress Report.

Request Extension

Progress Report Extension Request Details

Name: Month 3 2024 Progress Report Task Type: Progress Extension Request

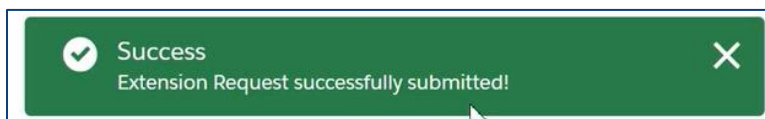
2. Enter the Description, including the reason why you are requesting an extension.

3. Enter the Requested Due Date or select the date from the calendar icon.

4. Select 'Cancel' if you wish to exit out from the extension request or select 'Submit' if you want to proceed with the extension request.

2. Enter the Description, including the reason why you are requesting an extension.
3. Enter the Requested Due Date or select the date from the calendar icon.
4. Select 'Cancel' if you wish to exit out from the extension request or select 'Submit' if you want to proceed with the extension request.

4.0 Request Progress Report Extension (continued)



Once submitted, view the Success message at the top of the funding award screen.

The screenshot shows the 'Funding Award' screen for ID 00510012SP2725. The 'Tasks' tab is selected, indicated by a red circle with the number 5. Below the tabs, there is a section titled 'Grant Tasks (2)' with a refresh icon. A table lists the tasks:

	Subject	Name	Record Type	Status	Action Require...
1	Workplan Revisions	GT-0101	Special Condition	Completed	
2	Month 3 2024 Progress Report- Progress Report Extension Request	GT-0102	Extension Request	Submitted	

The second row is highlighted with a red box and a red circle with the number 6. A 'View All' link is at the bottom right of the table.

To view the Extension Request and verify its status, navigate to the Tasks tab on the Funding Award.

5. Select the 'Tasks' tab.
6. View the Extension Request record for the Progress Report.

The Extension Request will automatically submit for ODH staff to review and approve. If the extension is approved, the status will change on the grant task. Agency Primary Users and Programmatic Contact will receive a notification that a Grant Task has been updated.

The screenshot shows the 'Funding Award' screen for ID 00510012SP2725. The 'Tasks' tab is selected. The table of 'Grant Tasks (2)' is shown, with the second row highlighted by a red box and a red circle with the number 7:


	Subject	Name	Record Type	Status	Action Require...
1	Workplan Revisions	GT-0101	Special Condition	Completed	
2	Month 3 2024 Progress Report- Progress Report Extension Request	GT-0102	Extension Request	Completed-Approved	

The status 'Completed-Approved' in the second row is highlighted with a red box. A 'View All' link is at the bottom right of the table.

7. View the Status as 'Completed-Approved'.

4.0 Request Progress Report Extension (continued)

If the Extension is approved, the Due Date for the Progress Report will be updated on the Progress Reports tab to the requested date.

 Funding Award
00510012SP2725

Access

Programmatic Contact Person
Joe Barnard

Subrecipient
Athens County Health Department

Amount
\$1,000.00

Status
Funded

Details

Workplan

Budget


Expense Reports

Progress Reports

Deliverables

Tasks

Files

 Progress Report

Name	Period Start Date	Period End Date	Status	Due Date
Month 1 2024 Progress Report	08/01/2024	08/31/2024	In Review	09/05/2024
Month 2 2024 Progress Report	09/01/2024	09/30/2024	Draft	10/05/2024
Month 3 2024 Progress Report	10/01/2024	10/31/2024	Draft	11/05/2024
Month 4 2024 Progress Report	11/01/2024	11/30/2024	Draft	12/05/2024

8. View the updated Due Date.

This is the conclusion of **4.0 Request Progress Report Extension**.

5.0 Complete a Site Visit

This Section Is Intended For: Primary Users, Secondary Users

Subrecipients will see the Site Visit tasks in the *Tasks* tab on their funding award. Open the task and select the 'Schedule Visit' button, which will launch the following screen flow to book the appointment slot. To schedule:

Funding Award
00510014F50124

Accept / Decline NOA Request Withdrawal

Programmatic Contact Person: Anna A Coffaro
Subrecipient: Athens County Health Department
Amount: \$1,000.00
Status: Funded

Details Workplan Budget Expense Reports Progress Reports Deliverables **Tasks** 1

Grant Tasks (2)
2 items • Updated a few seconds ago

	Subject	Name	Record Type	Status	Action Required by Date
1	Schedule Site Visit	GT-0100	Site Visit	Scheduled	
2	Schedule Site Visit	GT-0103	Site Visit	Open	

[View All](#)

1. Select the 'Tasks' tab on the Funding Award.
2. Select the desired Site Visit task that is Open to be scheduled.

Grant Task
Schedule Site Visit

+ Follow Printable View **Schedule Visit** 5

Record Type	Status	Funding Award
Site Visit	Open	<u>00220014JE0124</u>

Site Visit

Subject	Type
Schedule Site Visit	Grantmaking
Name	Funding Award
GT-0281	<u>00220014JE0124</u>
Date of Visit	Status
1/13/2025	Open
Comments	Record Type
Please schedule your site visit using my availability	Site Visit

Files (0) Add Files

Title	Owner	Last Mo...	Size
Post			
Share an update...			Share

4

3. Review Site Visit details and comments, as needed.
4. Communicate questions or comments with ODH about the site visit using the chatter functionality, as needed. If you do not see a time slot that works for you, please communicate with ODH through [here](#).
5. Select 'Schedule Visit'.

5.0 Complete a Site Visit (continued)

The Schedule Visit screen will populate based on what ODH designated as their available time slots.

Schedule Visit

October 8, 2024 - October 11, 2024
Time Zone: America/Chicago

6

TUE 8 WED 9 THU 10 FRI 11

2:30 - 3:30 pm 7 11:00 - 12:00 pm

2:45 - 3:45 pm 11:15 - 12:15 pm

3:00 - 4:00 pm 11:30 - 12:30 pm

11:45 - 12:45 pm

12:00 - 1:00 pm

12:15 - 1:15 pm

12:30 - 1:30 pm

8 Next

6. Utilize the navigation icons, if needed, to view different calendar dates.
7. Select one time slot to schedule the visit.
8. Select 'Next'.

Schedule Visit

Review Service Appointment

9

General Information

Work Type
Site Visit

Account
Ohio QA Test 7

Parent Record
Ohio QA Test 7

Address
1 Capitol Square
Columbus, OH 43215

Previous Next

9. Review Service Appointment General Information. Scroll down, if needed.

5.0 Complete a Site Visit (continued)

Schedule Visit

Scheduled Times

<p>Scheduled Start (America/Chicago)</p> <p>Fri, Jan 10, 2025, 12:15 PM</p>	<p>Scheduled End (America/Chicago)</p> <p>Fri, Jan 10, 2025, 01:15 PM</p>
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▼ Additional Information

Individual Application Task

Schedule Site Visit

Funding Award

00220014JE0124

Previous

Next

10. Review scheduled start and end time information.

11. Select Next.

Schedule Visit

Confirmation

Your requested time slot has been sent to the Program Consultant. You will receive an Outlook calendar invite from the Program Consultant to confirm the visit.

Thank you.

Finish

12. Review Confirmation message.

13. Select 'Finish' when complete.

Once submitted, an ODH Program Consultant or Manager will be reaching out to confirm the site visit details and send a calendar hold.

This is the conclusion of **5.0 Complete a Site Visit**.