

Last Updated: 2/03/25

GMIS Portal Managing Your Award



Duration: 2 hours



Audience: Primary and Secondary Users

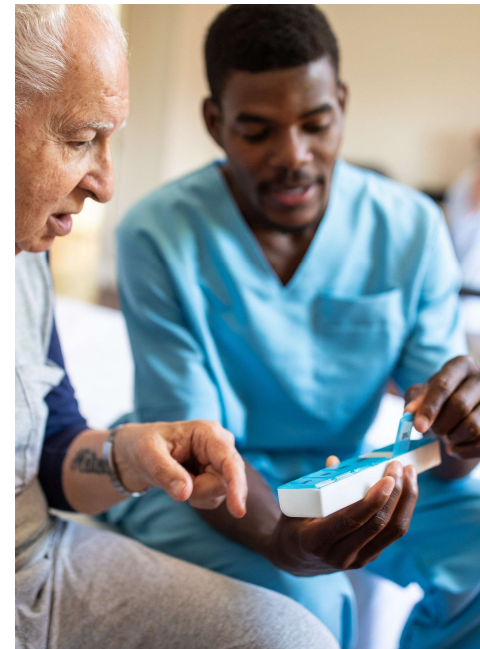
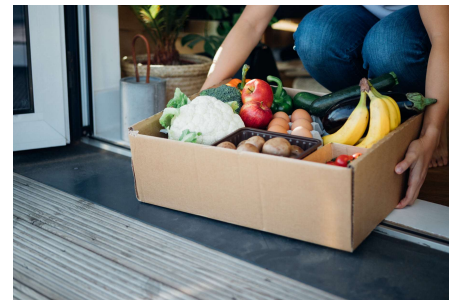
GMIS Portal Expenditure Reporting



Audience: Primary and Secondary Users

Learning Objectives

- ✓ Discuss an overview of Expense Reporting.
- ✓ Initiate and complete an Expense Report.
- ✓ Submit an Expense Report.
- ✓ Illustrate how to request an extension.



Please Reference the Job Aid!

The following Job Aid Sections can be referenced for greater detail and a more in-depth overview for content covered in the next slides:

- **1.0 View Expense Reports.**
- **2.0 Complete an Expense Report.**
- **3.0 Request Expense Report Extension.**
- **4.0 Complete Deliverables.**
- **5.0 Complete a WIC Expense Report.**



Expense Report Overview



Audience: Primary and Secondary Users

Key Terms

Expense Report

Report detailing the expenses to be reimbursed.

Reimbursement Period

The period of time in which the expenses incurred.

Special Conditions

A requirement requesting additional information from a Subrecipient. Can be used **during** the application process **before** NOA has been posted.

Task

Requesting additional information from a Subrecipient **after** NOA has been posted.

Primary User

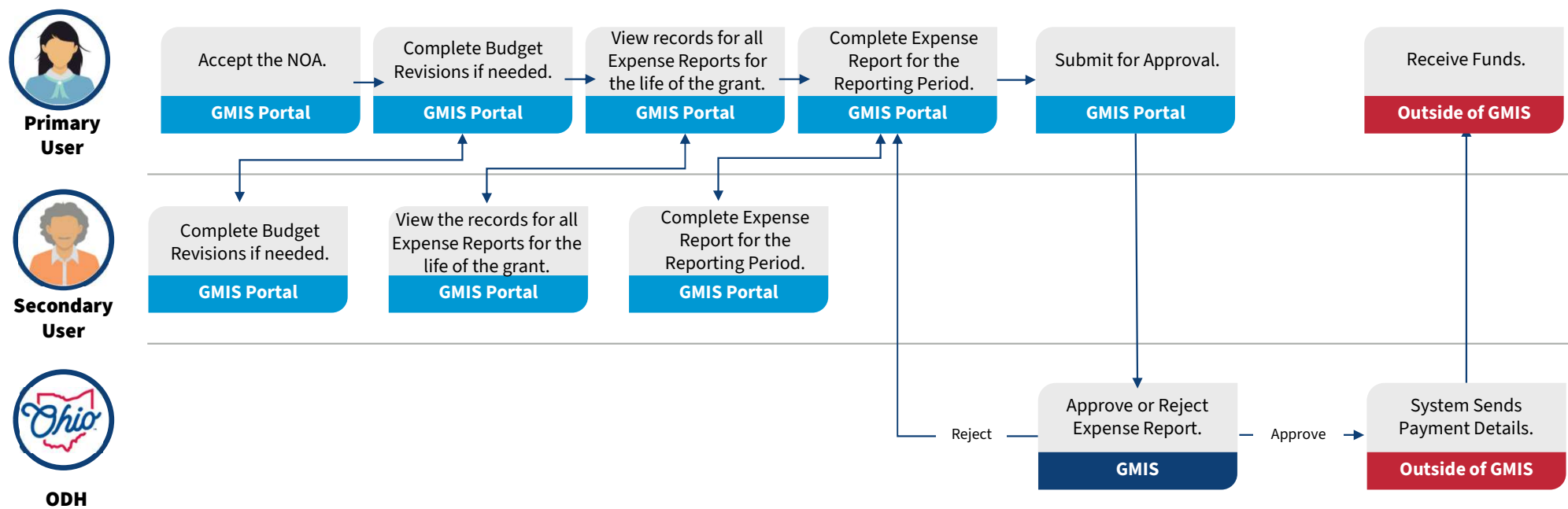
Priority Agency user with the most permissions who can initiate, edit, and submit expense reports.

Secondary User

Additional Agency User with limited permissions compared to a Primary User; can edit expense reports but not submit.

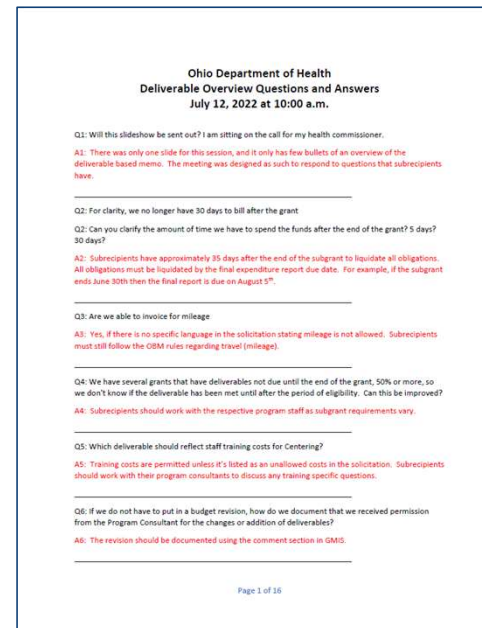
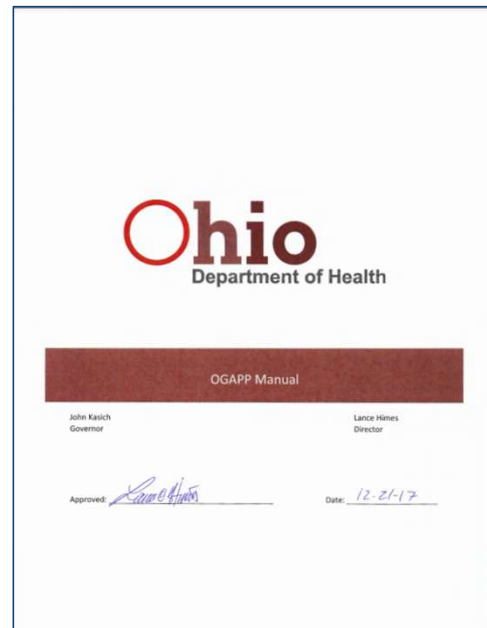
Expense Report Submission

Here is a high-level overview for when an Agency completes an Expense Report.






Reminder: Additional Expense Support

Make sure to review *OGAPP* and *Deliverable Overview Q&A* for the policies and procedures for Expense Reports.



Special Conditions Relating to Budget

Reminder to complete your Budget Revisions!

 Home Browse Grants More  

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 Deliverables **Tasks** Files

Funding Award Budget

New Budget Revision

Budget Name	Status	Period Start Date	Period End Date	Amount
FA-Budget - 00510012SP0428	Active	Jul 9, 2024	Aug 10, 2024	\$150,000.00



View the *GMIS Portal Notice of Award Job Aid* to learn more.



Expense Reports Are Seen On The Funding Award

Ohio Department of Health

Home Browse Grants My Applications **My Awards** My Agency Profile Reports

Funding Awards
Recently Viewed

33 Items • Updated a few seconds ago

Search this list...

	<input type="checkbox"/> Funding Award Name	<input type="checkbox"/> Last Modified By	<input type="checkbox"/> Last Modified Date	
1	<input type="checkbox"/> 00220011SS0125		10/10/2024, 10:33 AM	
2	<input type="checkbox"/> 00220014JE0218	Ben	10/29/2024, 11:28 AM	
3	<input type="checkbox"/> 00220014JE1117		11/5/2024, 2:45 PM	



Primary Users and the Programmatic Contact listed on the award will receive notification reminders of the upcoming Expense Report due date.

Expense Reports Tab within the Funding Award

Request Extension is available when:

- It's *not* the Final Expense Report.
- First day of the month prior to the due date and up to 30 days before the due date.

Edit is available when:

- It's the first day of the month the Expense Report is due.
- Status is in *Draft* or *In Progress*.



It's critical to submit by the due date!
Once submitted, the Expense Report
is locked from editing.

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

Deliverables

Tasks

Files

Expense Report

Name	Period Start Date	Period End Date	Status	Due Date	Description	
Expense Report - M1	07/01/2024	07/31/2024	Draft	08/05/2024, 04:00 PM	Month 1	Edit
Expense Report - M2	08/01/2024	08/31/2024	Draft	09/05/2024, 04:00 PM	Month 2	Edit
Expense Report - M3	09/01/2024	09/30/2024	Draft	10/05/2024, 04:00 PM	Month 3	Request Extension
Expense Report - M4	10/01/2024	10/31/2024	Draft	11/05/2024, 04:00 PM	Month 4	
Expense Report - M5	11/01/2024	11/30/2024	Draft	12/05/2024, 04:00 PM	Month 5	
Expense Report - M6	12/01/2024	12/31/2024	Draft	01/05/2025, 04:00 PM	Month 6	
Expense Report - M7	01/01/2025	01/31/2025	Draft	02/05/2025, 04:00 PM	Month 7	

Expense Report Tabs

The tabs you see within the Expense Report will depend on the Program Type.

Program Type	Tabs Displayed
100% Reimbursement	1. Summary. 2. Personnel. 3. Other Direct Costs. 4. Equipment. 5. Contracts.
100% Deliverable	1. Summary. 2. Deliverables.
Hybrid	1. Summary. 2. Personnel. 3. Other Direct Costs. 4. Equipment. 5. Contracts. 6. Deliverables.

Expense Report Columns

You'll see the following columns on each tab within the Expense Report.

Submit Expense Report

Summary Personnel Other Direct Costs Equipment Contracts Deliverables Chatter Files

Category	YTD Amount	Current Period	ODH Adjustment	Net Amount	Budgeted Amount	Remaining
Personnel	\$15,002	\$0	\$0	\$15,002	\$163,450	\$148,448
Other Direct Costs	\$1,003	\$0	\$0	\$1,003	\$3,500	\$2,497
Equipment	\$500	\$0	\$0	\$500	\$13,000	\$12,500
Contracts	\$0	\$0	\$0	\$0	\$5,050	\$5,050
Deliverables	\$0	\$0	\$0	\$0	\$15,000	\$15,000
Total	\$16,505	\$0	\$0	\$16,505	\$200,000	\$183,495

Submit Cancel

Expense Report Navigation

Edit



Pencil Icon can be used to edit an expense line item.

Save & Edit Next

Save & Edit Next

This saves the current expense line item and goes to the next expense line item to edit.

Save & Edit Previous

Save & Edit Previous

This saves the current expense line item and goes to the previous expense line item to edit.

Save

Save

This saves the current expense line item and returns the user to the previous view.

Cancel

Cancel

Closes the expense line item and returns user to the previous view.

Submit

Submit

Submits the entire expense report across all expense categories.



View section 2.1 General Expense Report Navigation.

Caution! *Submit* Will Show Up On Each Tab of the Expense Report

Make sure you've edited all expenses on EACH tab prior to hitting *Submit*. Once the Expense report is Submitted, the record is locked and Subrecipients cannot edit.

The image displays three overlapping screenshots of the 'Submit Expense Report' application, illustrating the 'Submit' button's placement across different tabs.

Top Screenshot (Other Direct Costs Tab):

Description	Funding Activity	YTD Amount	Current Period	ODH Adjustment	Net Amount	Budgeted Amount
Client Expenses	Activity2028	\$1,000	\$0	\$0	\$1,000	\$1,000
Utility Insurance	Activity2028	\$0	\$0	\$0	\$0	\$2,500

Middle Screenshot (Deliverables Tab):

Name	Deliverable	Funding Activity	Budgeted Amount	YTD Requested Amount	Requested Amount	Net Amount	Remaining	ODH Deliverable Met
Deliverable 1 - Meeting	Deliverable 1 - Meeting A	Activity2028	\$15,000	\$0	\$0	\$0	\$15,000	

Bottom Screenshot (Equipment Tab):

Warning: If you have purchased this equipment in the first 6 months of this budget period, you must submit an Equipment Purchase Order. If it was purchased in the last 6 months of this budget period, you must have an approved Equipment Waiver. You can do so on the Budget tab of your Funding Award.


Category	Funding Activity	YTD Amount	Current Period	ODH Adjustment	Net Amount	Budgeted Amount
Climate Control Unit	Activity123	\$500	\$0	\$0	\$500	\$7,500
Camera	Activity123	\$0	\$0	\$0	\$0	\$5,500








Use Chatter to Ask Questions


Use Chatter on the Expense Report to communicate with ODH.


Submit Expense Report

Summary Personnel Other Direct Costs Equipment Contracts Deliverables **Chatter** Files

 Comments


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





 Ben Low
9 minutes ago

I am not sure if I can expense XYZ. Can you please confirm?

Write a comment...



Completing an Expense Report




Audience: Primary and Secondary Users



Complete Deliverables *Prior* to Submitting Expense Report

This is only applicable to Funding Awards with Deliverables.

 Funding Award
00510012SP1828

Accept / Decline NOAWithdrawal

Programmatic Contact Person
Elizabeth Augostini

Subrecipient
Athens County Health Department

Amount
\$250,000.00

Status
Funded

Details

Workplan

Budget


Expense Reports

Progress Reports

Deliverables

Tasks

Files

 Deliverables

Name	Due Date	Status	Frequency	
Deliverable 1 - Meeting Attendance - Deliverable Month 01	-	Draft	Monthly	Edit
Deliverable 1 - Meeting Attendance - Deliverable Month 02	-	Draft	Monthly	Edit
Deliverable 1 - Meeting Attendance - Deliverable Month 03	-	Draft	Monthly	Edit
Deliverable 1 - Meeting Attendance - Deliverable Month 04	-	Draft	Monthly	Edit



This must be completed before submitting expenses against a Deliverable!



Editing an Expense Report Line Item (Non-WIC)

This will be the same no matter which Expense Report tab you are in.

Step 01

Select the Edit icon  on the line item.

Step 02

Add current period expenses.

Step 03



Add Comments.

Step 04

Save or Save & Edit Next.

Submit Expense Report

Summary Personnel **Other Direct Costs** Equipment Contracts Deliverables Chatter Files

Description	Funding Activity	YTD Amount	Current Period	ODH Adjustment	Net Amount	Budgeted Amount	
Client Expenses	Activity2028	\$1,003	\$0	\$0	\$1,003	\$1,000	
Liability Insurance	Activity2028	\$0	\$0	\$0	\$0	\$2,500	

01

Edit Category

Name: Client Expenses
Funding Activity: Activity2028
ODH Adjustment: 0
ODH Comments:

Net Amount: \$1,003
YTD Amount: \$1,003
Budgeted Amount: \$1,000
Current Period: \$0
Comments:

02

03

04

Save & Edit Previous Cancel Save Save & Edit Next



Reminder: Do not hit *Submit* until you have edited all Expense Reports tabs and are ready to submit to ODH!

Editing A WIC Expense Report

WIC Expense Reports will include a breakdown of percentages tagged to Administration, Breast Feeding, Clinic, and Nutrition.

Submit Expense Report

Summary Personnel Other Direct Costs Equipment Contracts Deliverables Chatter Files

Administration % Breast Feeding % Clinic % Nutrition %

0% 0% 0% 0%

Employee	Funding Acti...	YTD Amount	Current Peri...	ODH Adjust...	Net Amount	Budgeted A...
Anna A Coffaro	WIC9999	\$0	\$0	\$0	\$0	\$5,000

Edit Record

WIC9999 \$0

ODH Adjustment: 0 Budgeted Amount: \$5,000

ODH Comments: Current Period: \$1,000

Comments:

* Administration \$250 * Breast Feeding \$250

* Clinic \$300 * Nutrition \$200

Save & Edit Previous Cancel Save Save & Edit Next



View section 5.0 Complete a WIC Expense Report.

Submit an Expense Report



Audience: Primary Users

Submitting an Expense Report

Start by selecting *Submit* on the Expense Report.

Submit Expense Report

Summary Personnel Other Direct Costs Equipment Contracts Deliverables Chatter Files

Category	YTD Amount	Current Period	ODH Adjustm...	Net Amount	Budgeted Am...	Remaining
Personnel	\$0	\$11,000	\$0	\$11,000	\$66,500	\$55,500
Other Direct Costs	\$0	\$0	\$0	\$0	\$25,500	\$25,500
Equipment	\$0	\$7,500	\$0	\$7,500	\$20,000	\$12,500
Contracts	\$0	\$0	\$0	\$0	\$13,000	\$13,000
Deliverables	\$0	\$0	\$0	\$0	\$0	\$0
Total	\$0	\$18,500	\$0	\$18,500	\$125,000	\$106,500

Submit 01

Expense Report Submission

Please review the total amount requested and agree below before submission.

Amount Requested :
\$18,500

☐ I certify that the amount claimed is true and fully supported by the detailed accounting records of my agency, which are available for examination and/or audits.

02

03 Submit



View section 2.3 Submit an Expense Report.

\$0 Expense Report

No expenses within a period? Submit a \$0 expense report!

Expense Report Submission

Please review the total amount requested and agree below before submission.

Amount Requested:
\$0

☒ I certify that the amount claimed are true and are fully supported by the detailed accounting records of my Organization, which are available for examination and /or audits.

[Previous](#) [Submit](#)

[Cancel](#)



View [section 2.5 Submit a \\$0 Expense Report.](#)



Department of
Health

Request an Extension



Audience: Primary & Secondary Users

View Section 3.0 Request
Expense Report Extension.



Request an Extension

Agency Primary and Secondary Users can request an extension.

Request Extension

First day of the month prior to the due date and up to 30 days before and it's not the Final Expense Report.

Description

Enter *why* you are requesting the extension.

Requested Due Date

Enter your preferred new due date.

Name	Period Start Date	Period End Date	Status	Due Date	Description	
Expense Report - M1	07/01/2024	07/31/2024	Draft	08/05/2024, 04:00 PM	Month 1	Edit
					Month 2	Edit
					Month 3	Edit



Remember to follow the OGAPP procedures!

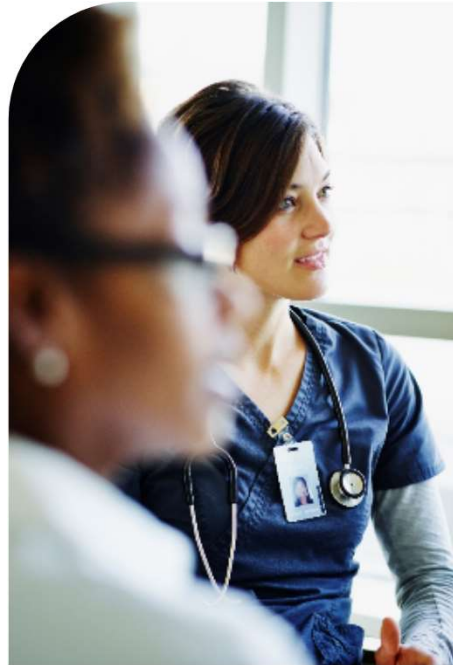
GMIS Portal Progress Reporting



Audience: Agency Primary & Secondary Users

Learning Objectives:

- ✓ Discuss an overview of Progress Reporting.
- ✓ Initiate, complete, and submit a Progress Report.
- ✓ Illustrate how to request an extension.
- ✓ Manage Site Visits.



Please Reference the Job Aid!

The following Job Aid Sections can be referenced for greater detail and a more in-depth overview for content covered in the next slides:

- **1.0 Review Progress Reporting Overview.**
- **2.0 View Progress Reports.**
- **3.0 Complete Progress Reports.**
- **4.0 Request Progress Report Extension.**
- **5.0 Complete a Site Visit.**



GMIS Portal Progress Reporting Job Aid.

Overview of Progress Report



Audience: Primary and Secondary Users



Key Terms

Progress Report

Update to ODH on the progress toward the workplan. This is also sometimes referred to as a Program Report.

Workplan

Details for how an Agency will meet the Solicitation goals and objectives.

System Generated Workplan

Preferred workplan type that allows reporting. Allow the agency user to manually enter how they will meet solicitation goals, objectives, and activities.

Non-System Generated Workplan

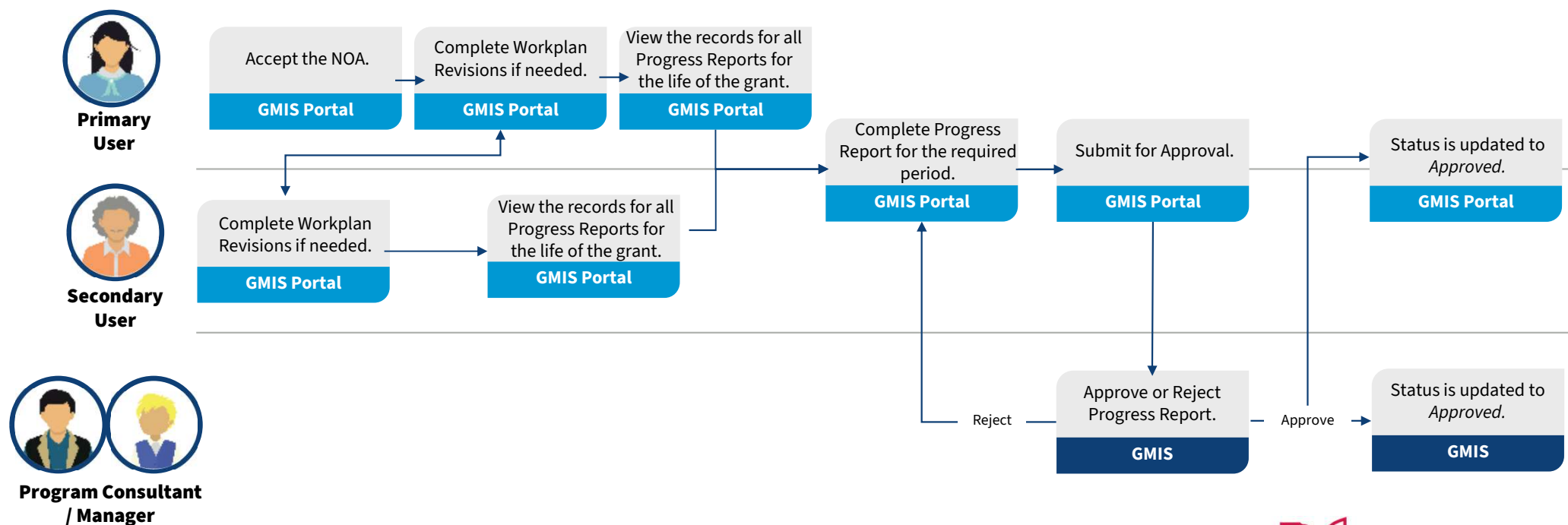
Workplan type that does not allow reporting. Allow the agency user to upload a completed workplan file.

Site Visit

Evaluation conducted by ODH to assess the progress, compliance, and effectiveness of a subgrantee's project or program.

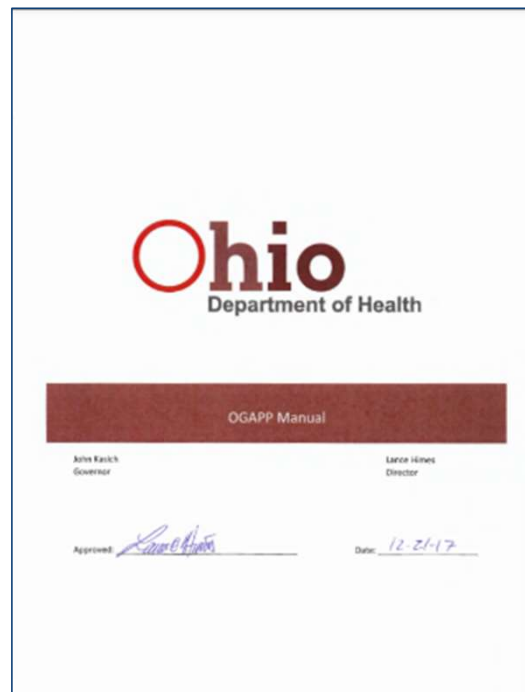
Progress Report Submission

Here is a high-level overview for when a Subrecipient completes a Progress Report.



Reminder: Additional Progress Report Information


Make sure to review *OGAPP* for additional progress report details.



[View OGAPP Manual](#)

Special Conditions Relating to Workplan

Reminder to complete your Workplan Revisions!

 Funding Award
00510012SP2725

[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

 Grant Tasks (1)

1 item • Updated a few seconds ago

	Subject	Name	Record Type	Status	Action Required by Date
1	<u>Workplan Revisions</u>	GT-0101	Special Condition	Open	

View All



View the *GMIS Portal Notice of Award Job Aid* to learn more.

View section 2.0 View
Progress Reports.



Progress Reports Are Seen On The Funding Award

The screenshot shows the Ohio Department of Health Grants portal. The header includes the Ohio Department of Health logo and navigation links: Home, Browse Grants, My Applications, My Awards (highlighted with a red box and a red circle containing '01'), My Agency Profile, and Reports. There are also notification and user profile icons. The main content area features the title 'ODH Grants' and a description: 'The Ohio Department of Health offers grants relating to a variety of public health programs to'. The background of the main content area shows a bar chart with an upward trend.



Primary Users and the Programmatic Contact listed on the award will receive notification reminders of the upcoming Progress Report due date.

Progress Reports Tab within the Funding Award

Request Extension is available:

- Until the last day of the *Period End Date*.

Edit is available when:

- Status is in *Draft*, *In Progress* or *Rejected*.

Funding Award

00510012SP2725

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	08/01/2024	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
Month 6 2025 Progress Report	01/01/2025	01/31/2025	Draft	02/05/2025	Request Extension	Edit
Month 7 2025 Progress Report	02/01/2025	02/28/2025	Draft	03/05/2025	Request Extension	Edit



Make sure to submit by the due date! Once submitted, the Progress Report is locked from edits.

Use Chatter to Ask Questions

Use Chatter on the Progress Report to communicate with ODH.

The screenshot displays the 'Progress Report Workplan Details' window. At the top, there are two tabs: 'Workplan' and 'Chatter'. The 'Chatter' tab is selected and highlighted with a red rectangle. Below the tabs, there is a 'Comments' section. This section includes a text input area with a rich text editor toolbar (containing icons for bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, and other formatting options). Below the input area is a blue 'Post' button. The comments list shows a post from 'Program Consultant - CHAP' made '2 hours ago' with the text 'missing progress info on goal #2'. Below this, there are two entries from 'Anna Cottrell' with the text 'update made and resubmitted'. At the bottom right of the window, there are 'Cancel' and 'Submit' buttons.

Initiate, Complete, and Submit a Progress Report



Audience: Primary and Secondary Users

Non-System vs. System Generated Workplan

There are two kinds of workplans in GMIS Portal.

Non-System Generated

Progress Report Workplan Details

Workplan

Chatter

Upload Files

Upload Files

Or drop files

Enter your comment here

Cancel

Submit

System Generated

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

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

FA-Enhance Oral Health Education and Awareness

Edit Objective

Cancel

Submit

View section 3.1 Progress Reports
for System Generated Workplans.



System Generated Workplan

01 Progress Report Workplan Details

Workplan Chatter

✓ FA-IA-0000000221 Workplan

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

02 ✓ 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

> FA-Increase Access to Preventive Dental Services

> FA-Enhance Oral Health Education and Awareness

03 Edit Goal

04 Edit Objective

Cancel Submit

Goal Progress Report Update

Details

Goal Name: FA-Improve oral health and hygiene
Smartie: ☒
Description: To improve oral health and hygiene outcomes for underserved p
Goal Met?: ☐
Narrative: progress for this goal is 0
Cancel Save

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: 11/1/2024
Narrative:
Cancel Save



Reminder: Do not hit *Submit* until you have edited all Progress Report goals, objectives and activities and are ready to submit to ODH!

System Generated Workplan Historical View

Goal Progress Report Update

Details

Goal Name

FA-Improve oral health and hygiene

Smartie

☒

Description

To improve oral health and hygiene outcomes for underserved

Goal Met ?

☐

Narrative

History

Progress Report	Goal ...	Narrative
Month 1 2024 Progress Report	✓	progress for this goal xyz

Cancel

Save



Non-System Generated Work Plan

Progress Report Workplan Details

01 **Workplan** Chatter

02 Upload Files

[Upload Files](#) Or drop files

File Name	File Extension	File	Uploaded Date	
2024 Progress Report	docx	12 KB	Oct 8, 2024	

03 month progress report file

Cancel Submit



Reminder: Do not hit *Submit* until all Progress Reports files have been uploaded and are ready to submit to ODH!



Submitting Your Progress Report

Progress Report Workplan Details

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

Description: Increase Access to Preventive Dental Services by completing the activities related to improve overall oral health.

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.

FA-Activity 1.1: Pl... 12/31/2024 02/27/2025 Local Clinics 02 Submit

✓ FA-Enhance Oral Health Education and Awareness Edit Objective

Description: Enhance Oral Health Education and Awareness through multiple channels in the community.
Key Indicator:
External Partner: 01 Submit



Both Primary & Secondary Users can submit!

Monitoring Your Progress Reports

Progress Report Goals Progress Report Goals block 1				Progress Reports Objectives Progress Reports Objectives block 1				Progress Report Activities Progress Report Activities block 1				
Goal Name	Goal Met ?	Narrative	Last Modified By: Full Name	Goal: Goal Name	Objective Name	Narrative	Last Modified By: Full Name	Objective: Goal: Goal Name	Objective: Objective Name	Activity Name	Narrative	Last Modified By: Full Name
FA-Goal 1- Host Monthly Events	<input type="checkbox"/>	progress report revision	Anna Augustini	FA-Goal 1- Host Monthly Events	FA-obj	this obj is complete	Elizabeth Augustini	FA-Goal 1- Host Monthly Events	FA-obj	FA-ac	-	-
goal 3	-	-	-	FA-Goal 1- Host Monthly Events	obj 2	-	-	FA-Goal 1- Host Monthly Events	FA-obj	actv 2	-	-
goal 2	-	-	-									

Goal: Goal Name	Objective: Objective Name	Activity: Activity Name	Narrative	Goal Met ?	Last Modified Date	Last Modified By: Full Name
FA-Goal 1- Host Monthly Events	-	-	progress report revision	<input type="checkbox"/>	9/18/2024	Anna Augustini
-	FA-obj	-	this obj is complete	<input type="checkbox"/>	11/15/2024	Elizabeth Augustini



View the *GMIS Portal Reporting Job Aid* to learn more!

Requesting an Extension



Audience: Primary and Secondary Users

Request an Extension

Agency Primary and Secondary Users can request an extension on their Progress Report.

Request Extension

Available until the last day of the *Period End Date*.

Description

Enter *why* you are requesting the extension.

Requested Due Date

Enter your preferred new due date.

The screenshot displays the 'Request Extension' interface. At the top, a header bar shows 'Funding Award: 005100125P2725' and buttons for 'Accept / Decline NOA' and 'Request Withdrawal'. Below this, a table lists progress reports with columns for Name, Period Start Date, Period End Date, Status, Due Date, and an Edit button. A modal window titled 'Request Extension' is open, showing 'Progress Report Extension Request Details'. It includes a 'Name' field with 'Month 3 2024 Progress Report' and a 'Task Type' dropdown set to 'Progress Extension Request'. There are two text input fields: '*Description' and '*Requested Due Date'. At the bottom of the modal are 'Cancel' and 'Submit' buttons. A red box highlights the 'Request Extension' button in the table's Edit column.

Name	Period Start Date	Period End Date	Status	Due Date	
Month 1 2024 Progress Report	06/01/2024	06/30/2024	Draft	06/05/2024	Edit
Month 2 2024 Progress Report	06/01/2024	06/30/2024	Draft	06/05/2024	Edit
Month 3 2024 Progress Report	06/01/2024	06/30/2024	Draft	06/05/2024	Edit
Month 4 2024 Progress Report	06/01/2024	06/30/2024	Draft	06/05/2024	Edit
Month 5 2024 Progress Report	06/01/2024	06/30/2024	Draft	06/05/2024	Edit
Month 6 2024 Progress Report	06/01/2024	06/30/2024	Draft	06/05/2024	Edit

Request Extension

Progress Report Extension Request Details

Name: Month 3 2024 Progress Report

Task Type: Progress Extension Request

*Description

*Requested Due Date

Cancel Submit




View section 4.0 Request Progress Report Extension.

Site Visits



Audience: Primary and Secondary Users

Site Visit Requests Found Under Tasks on Funding Award

 Funding Award
00510014F50124

Accept / Decline NOARequest Withdrawal


Programmatic Contact Person
Anna A Coffaro

Subrecipient
Athens County Health Department

Amount
\$1,000.00

Status
Funded

DetailsWorkplanBudgetExpense ReportsProgress ReportsDeliverables**Tasks**Files

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

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

View All



View section 5.0 Complete a Site Visit.

Select Schedule Visit

Grant Task

Schedule Site Visit

Record Type

Site Visit

Status

Open

Funding Award

00510014F50124

Subject

Schedule Site Visit

Funding Award

00510014F50124

Date of Visit

10/9/2024

Status

Open

Comments

We need the yearly site visit, use the scheduler to schedule appointment time

Record Type

Site Visit

System Information

Type

Grantmaking

Created Date

10/8/2024, 12:53 PM

+ Follow

Schedule Visit

Files (0)

Add Files

Title

Owner

Last Mo...

Size

Post

Share an update...

Share

Sort by:

Most Recent Activity

Q S.

Y

C



You will receive a calendar hold once your time slot is confirmed.



Department of
Health

Have Questions?

For any further inquiries or additional support, please reach out to:

Grant.Support@odh.ohio.gov

Thank You!

We appreciate your time and participation in today's training session. Your engagement is key to our shared success! In today's session you learned:

Expenditure Reporting

- ✓ Discuss an overview of Expense Reporting.
- ✓ Initiate and complete an Expense Report.
- ✓ Submit an Expense Report.
- ✓ Illustrate how to request an extension.

Progress Reporting

- ✓ Discussed an overview of Progress Reporting.
- ✓ Initiated, completed, and submitted a Progress Report.
- ✓ Illustrated how to request an extension.
- ✓ Managed Site Visits.