

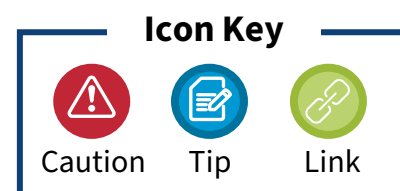
GMIS Portal Audit and Compliance Job Aid



Department of
Health

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1.0 Complete Desk Review	Primary User Secondary User	<u>3-6</u>



1.0 Complete Desk Review

This Section Is Intended For: Primary Users, Secondary Users



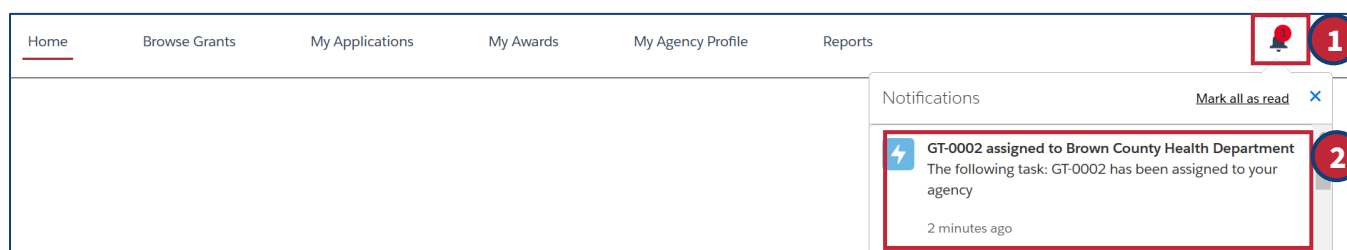
Desk Reviews in GMIS Portal may vary.

Desk Reviews in the GMIS Portal may vary depending on the grant. In the past, scheduling and coordination of Desk Reviews or Corrective Action Plans (CAP) were managed through email between Subrecipients and ODH. However, in GMIS ODH can now exchange files with Subrecipients and schedule Desk Review time slots directly within the platform. This job aid outlines the capabilities available for Desk Reviews in GMIS/GMIS Portal, though please note that not all instructions may apply to your specific grant

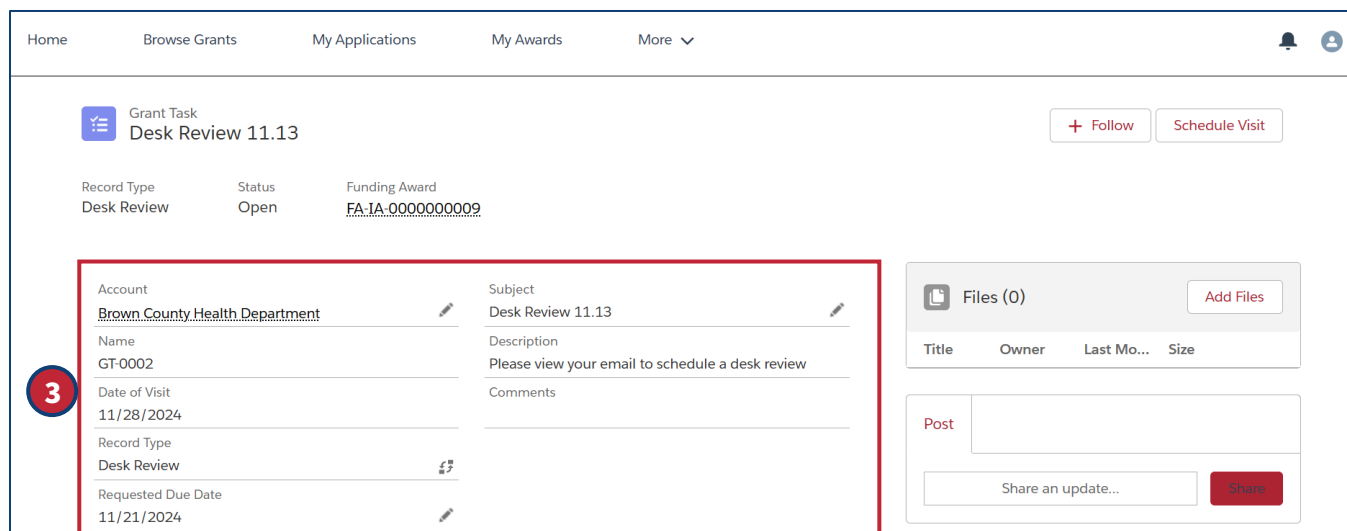
Two of the ways you can navigate to a Desk Review task is through **1.1 View Desk Review Task – Notifications** or **1.2 View Desk Review Task – Funding Award**.

1.1 View Desk Review Task - Notifications

If a Desk Review has been assigned, it can be viewed in the notifications banner at the top of the screen.



1. Select the bell icon to open notifications.
2. Select the Desk Review Grant task.



The Desk Review Grant Task will open.

3. View provided information for Desk Review, including any comments and important dates.

This is the conclusion of Section **1.1 View Desk Review Task – Notifications**.

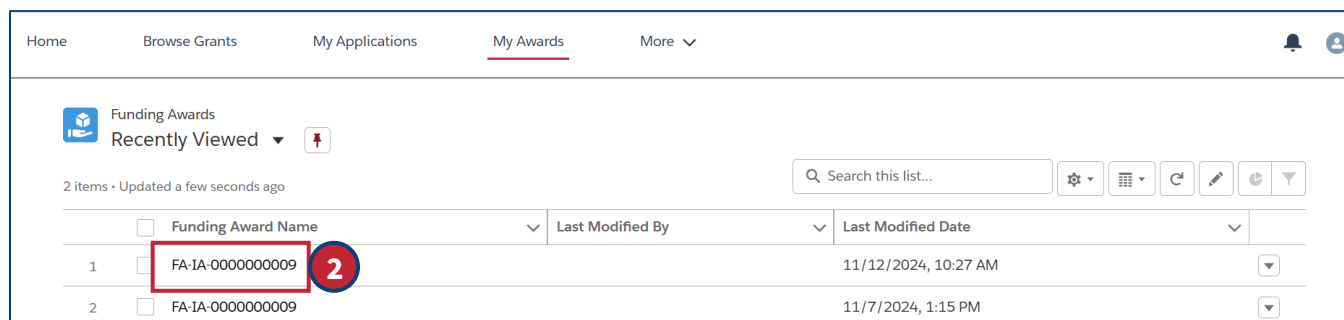
1.0 Complete Desk Review (continued)

1.2 View Desk Review Task – Funding Award

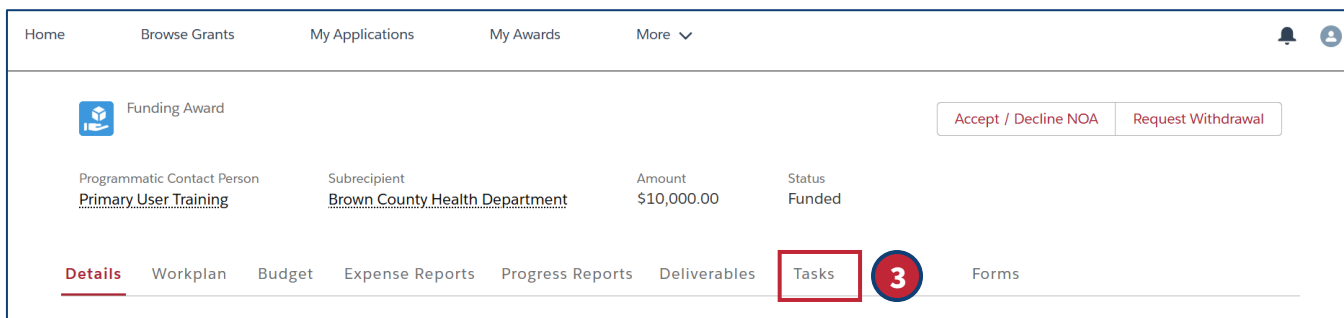
Desk Review Grant Tasks can also be accessed through the Funding Award, instead of through the Notifications Banner.



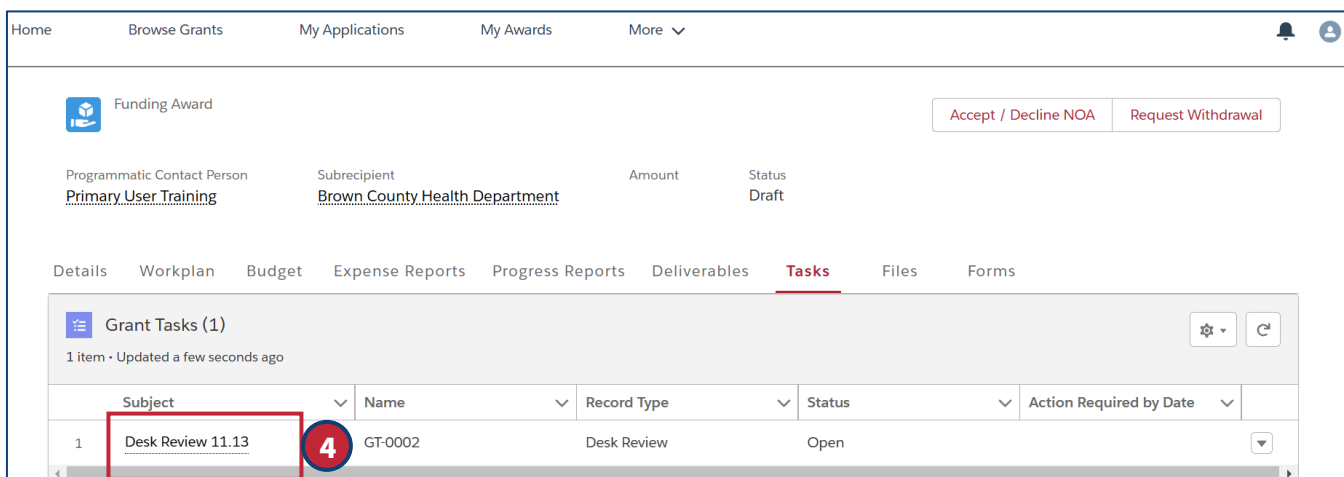
1. Select 'My Awards' from the top of the screen.



2. Select the desired Funding Award Name.



3. Select the 'Tasks' tab.



4. Select the desired Desk Review Grant Task.

1.0 Complete Desk Review (continued)

1.2 View Desk Review Task – Funding Award (continued)

Home Browse Grants My Applications My Awards More ▾

Grant Task
Desk Review 11.13

+ Follow Schedule Visit

Record Type: Desk Review Status: Open Funding Award: FA-IA-0000000009

Account

Brown County Health Department

Name

GT-0002

Date of Visit

11/28/2024

Record Type

Desk Review

Requested Due Date

11/21/2024

Subject

Desk Review 11.13

Description

Please view your email to schedule a desk review

Comments

Files (0) Add Files

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

The Desk Review Grant Task will open.

- View provided information for Desk Review, including any comments and important dates.

This is the conclusion of Section **1.2 View Desk Review Task – Funding Award**.

1.3 Files

Home Browse Grants My Applications My Awards More ▾

Grant Task
Desk Review 11.13

+ Follow Schedule Visit

Record Type: Desk Review Status: Open Funding Award: FA-IA-0000000009

Account

Brown County Health Department

Name

GT-0002

Date of Visit

11/28/2024

Record Type

Desk Review

Requested Due Date

11/21/2024

Subject

Desk Review 11.13

Description

Please view your email to schedule a desk review

Comments

Files (0) Add Files

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

- View the Files section, if applicable, to find any additional documentation or resources requested by ODH. The Files section can contain documents uploaded by ODH, as well as submitted by Subrecipients.
- Select 'Add Files' and follow onscreen prompts to upload your own File(s) if requested to provide additional documentation to ODH for the Desk Review.

This is the conclusion of Section **1.3 Files**.

1.0 Complete Desk Review (continued)

1.4 Chatter

1. Select the 'Share an update' box to utilize the chatter functionality and type a question or comment for ODH for the Desk Review, if applicable.
2. Select 'Share' to send the message.

This is the conclusion of Section **1.4 Chatter**.

1.5 Schedule Visit for Desk Review in GMIS Portal

1. Select 'Schedule Visit'.



Review the **GMIS Portal Progress Reporting Job Aid** for remaining steps!

On rare occasions, Subrecipients may be prompted to schedule a Desk Review in the GMIS Portal rather than through email. The protocol for scheduling an on-site desk review can be found in the **Progress Reporting Job Aid, Section 5.0 Site Visits**.

This is the conclusion of Section **1.5 Desk Review Site Visits**.

This is the conclusion of Section **1.0 Complete Desk Review**.