

Last Updated: 1/19/25

GMIS Portal 101 & Agency Registration



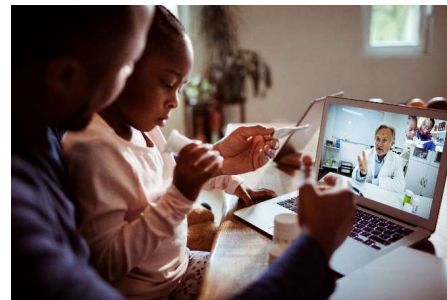
Duration: 2.5 hours



Audience: Agency Users

Learning Objectives

- ✓ Review GMIS Portal foundations.
- ✓ Instruct on general navigation.
- ✓ Explain core grants features and objects (i.e. pages in GMIS Portal).
- ✓ Communicate where to go for additional support.



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:

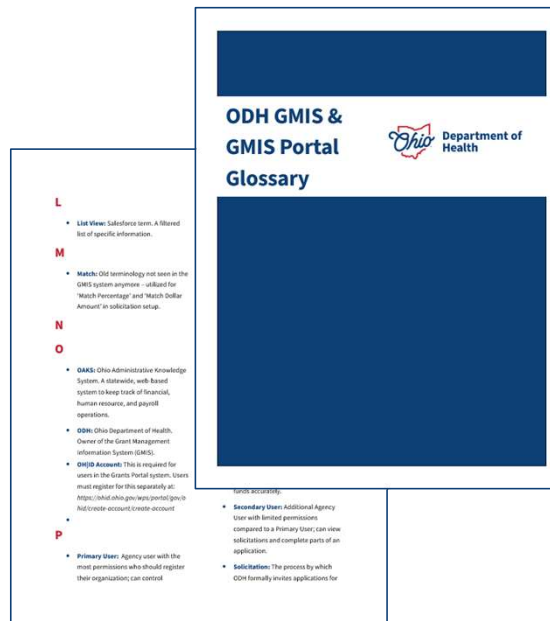
- **1.0 Log into GMIS Portal.**
- **2.0 Review GMIS Portal General Navigation.**
 - **2.1 View all Notifications.**
 - **2.2 Use List Views.**



GMIS Portal System Access & Navigation Job Aid.

Key Terminology To Get Started

Reference the full glossary for key terms.



GMIS 101 Is Just The Beginning!

Sign up for live training across all GMIS Portal Capabilities, or view all on-demand training.

Available GMIS Portal Live Trainings	
1.	GMIS Portal 101 & Agency Registration Live Training
2.	GMIS Portal Grant Application Submission Live Training
3.	GMIS Portal Notice of Award Live Training
4.	GMIS Portal Managing Your Award Live Training
5.	GMIS Portal Close-Out Live Training
6.	GMIS Portal Reporting Live Training

GMIS Portal On-Demand Training	
Capability	Materials
GMIS Foundations	GMIS Glossary Job Aid GMIS Portal 101 Video GMIS Portal Reporting Video GMIS System Access and Navigation Job Aid GMIS Reporting Job Aid
Agency Profile	GMIS Portal Agency Registration Video GMIS Portal Agency Registration Job Aid
Application	GMIS Portal Grant Application Submission Video GMIS Portal Grant Application Submission Job Aid
Notice of Award	GMIS Portal Notice of Award, Budget Revision and Workplan Revision Video GMIS Portal Notice of Award, Budget Revision and Workplan Revision Job Aid
Expenditure Reporting	GMIS Portal Expenditure Reporting Video GMIS Portal Expenditure Reporting Job Aid
Progress Reporting	GMIS Portal Progress Reporting, including Site Visits Video GMIS Portal Progress Reporting, including Site Visits Job Aid
Audit & Compliance	GMIS Portal Audit & Compliance Video GMIS Portal Audit & Compliance Job Aid
Close-Out	GMIS Portal Close-Out Video GMIS Portal Close-Out Job Aid

GMIS Portal Foundations



Audience: Agency Users



Key Terms

Salesforce

A cloud-based software company who provides a wide array of platforms.

Salesforce Grants Management

The specific platform we are using for GMIS Portal.

GMIS Portal

Grants Management Information System. GMIS Portal is the external Agency User view.

Primary User

Agency user with the most permissions who should register their organization.

Secondary User

Additional Agency User with limited permissions compared to a Primary User.

OH|ID

This is required for users in the Grants Portal system. Users must register for this separately.

ODH GMIS & GMIS Portal is Powered by

salesforce

GMIS - Internal

The screenshot displays the internal GMIS interface. At the top, there's a search bar and navigation tabs for 'Grants Management' and 'Home'. The main section is titled 'Active Bulletin Board' and lists three items: '2027 Solicitations Released', 'Reminder: Agency Forms Due in May', and 'Updated Scoring Rubric for 2025'. Below this, there's a 'Solicitations' tab with a sub-tab 'Open Solicitations'. A table lists 15 items, including '12/2024 7/8 PDF Grants' and '12/24 7/8 PDF Grants', with columns for Name, Grant, ODH Program Area, Status, and Grant Type. On the right, there's a 'Need help? Access our training materials here.' link and a list of 'Items to Approve' with details like 'Funding Award' and 'Submitted by'.

Bulletin Board Name	Description	Year	Status
2027 Solicitations Released	Please Browse Grants to see the list of grants for 2027.	2027	Active
Reminder: Agency Forms Due in May	Make sure to complete your Agency Profile forms by May 30. These forms ...	2025	Active
Updated Scoring Rubric for 2025	There is a new scoring rubric which will be in effect starting January 1, 2025.	2025	Active

Name	Gr...	ODH Program Area	Status	Grant Type
12/2024 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Competitive
12/2024 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Competitive
12/2024 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Continuation
12/2024 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Competitive
12/2024 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Competitive
12/24 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Continuation
12/24 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Continuation
12/24 7/8 PDF Grants	2024	Women, Infant and Children	Approved	Continuation

GMIS Portal - External

The screenshot displays the external GMIS Portal. At the top, there's a search bar and navigation tabs for 'Home' and 'Browse Grants'. The main section is titled 'ODH Grants' and includes a description: 'The Ohio Department of Health offers grants relating to a variety of public health programs to organizations in Ohio, including county and local health departments.' Below this, there's a 'Browse Grants' button. At the bottom, there are links for 'ODH GRANTS SITE', 'TRAINING MATERIAL', 'POLICIES, PROCEDURES & ADDITIONAL RESOURCES', and 'CONTACT US'.

ODH Grants

The Ohio Department of Health offers grants relating to a variety of public health programs to organizations in Ohio, including county and local health departments.

[Browse Grants](#)

[ODH GRANTS SITE](#) [TRAINING MATERIAL](#) [POLICIES, PROCEDURES & ADDITIONAL RESOURCES](#) [CONTACT US](#)

GMIS Portal

Here are some examples of actions that will be completed in GMIS Portal (*not exhaustive*).

GMIS PORTAL	
Technology	
Actions	<ul style="list-style-type: none">• Managing Agency Information & Contacts.• Viewing Solicitations.• Applying to Solicitations.• Accepting or Declining Notice of Award (NOA).• Completing Budget Revisions & Expense Reports.• Completing Workplan Revisions & Progress Reports.• Signing Up for a Site Visit.• Desk Review.

What Does It Mean To Be A Primary or Secondary User?



Primary User

2-4 per Agency

- Can register the Agency.
- Can edit the Agency Profile.
- Can add new Primary and Secondary users for the Agency.
- Can deactivate all users.
- Can start and submit an Application.
- Can submit Expenditure Reports.



Secondary User

No minimum or maximum per Agency

- Have set permissions.
- Can view solicitations.
- Can complete parts of an Application.
- Can edit Expenditure Reports.
- Can edit and submit Progress Reports.



The Agency Head must be one of the Primary Users.



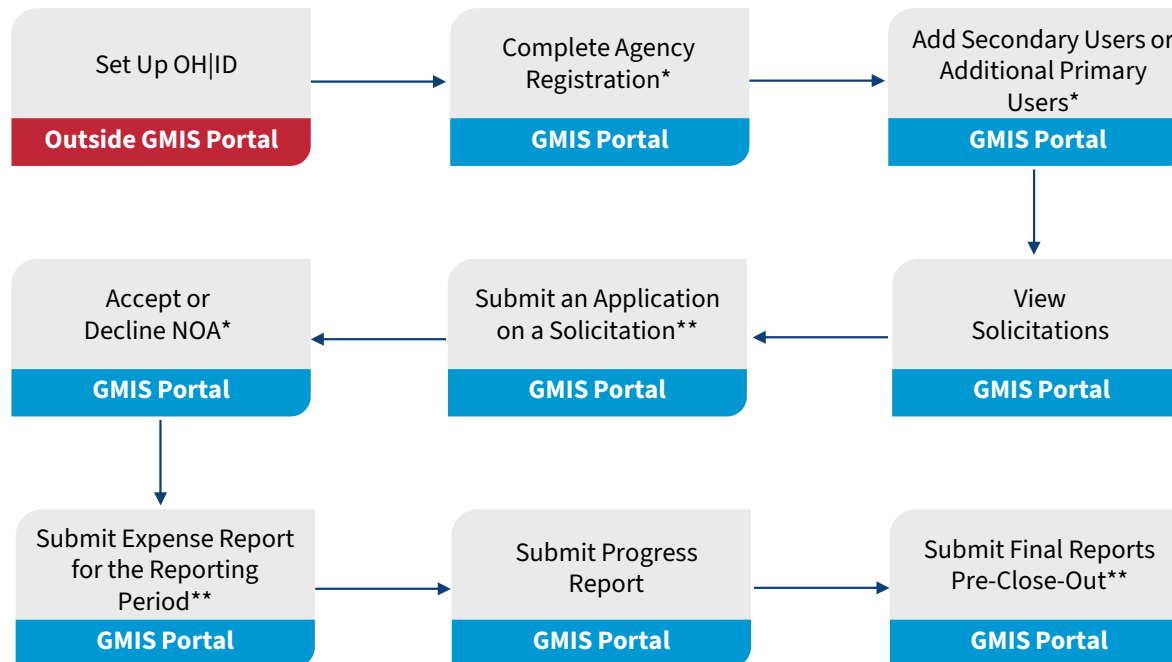
Department of
Health

Grant Cycle in GMIS Portal

Here are the core activities part of the grant cycle in GMIS Portal.



Agency Users



*Only Primary User

**Secondary Users can contribute, but not submit.



View section 1.0 Log Into GMIS Portal.

Log into GMIS Portal

You'll use your OH|ID to login into GMIS.

The screenshot shows the Ohio Department of Health Grants portal. The top navigation bar includes the Ohio Department of Health logo, 'Home', and 'Browse Grants'. A red box highlights the 'Login' button in the top right corner. A red dashed line connects this button to a callout box on the right showing the OHID login form. The callout box includes the OHID logo, the text 'Ohio's Digital Identity. One State. One Account.', a 'Create account' button, a 'Log In' section with fields for 'OHID' and 'Password', a 'Log In' button, and a link for 'Forgot your OHID or password?'. Another red box highlights the 'Browse Grants' button on the main content area, with a red dashed line connecting it to a callout box at the bottom. The bottom callout box shows the 'Browse Grants' page with a 'Solicitations' section, a 'Recently Viewed Solicitations' table, and a search bar.

Ohio Department of Health

Home Browse Grants

Login Register

ODH Grants

The Ohio Department of Health offers grants relating to a variety of public health programs to organizations in Ohio, including county and local health departments.

Browse Grants

OHID
Ohio's Digital Identity.
One State. One Account.
Register once, use across many State of Ohio websites

Create account

Log In

OHID

Password

Log In

Forgot your OHID or password?

Ohio Department of Health

Home Browse Grants

Solicitations

Recently Viewed Solicitations

0 items • Sorted by Name • Filtered by Recently Viewed • Updated a few seconds ago

Search this list...

Name ↓ Last Modified By Last Modified Date

General Navigation



Audience: Agency Users

Key Terms

Objects

Pages in GMIS Portal that allow you to store specific data. i.e. Accounts or Solicitations. These are banner items along the top of the Portal.

Records

Specific data, or items, stored within an object. i.e. Dublin County for Accounts or specific Solicitation.

List Views

A way to sort or filter information found on an object/page.

Chatter

A way to directly communicate between ODH and Agencies in GMIS/GMIS Portal.

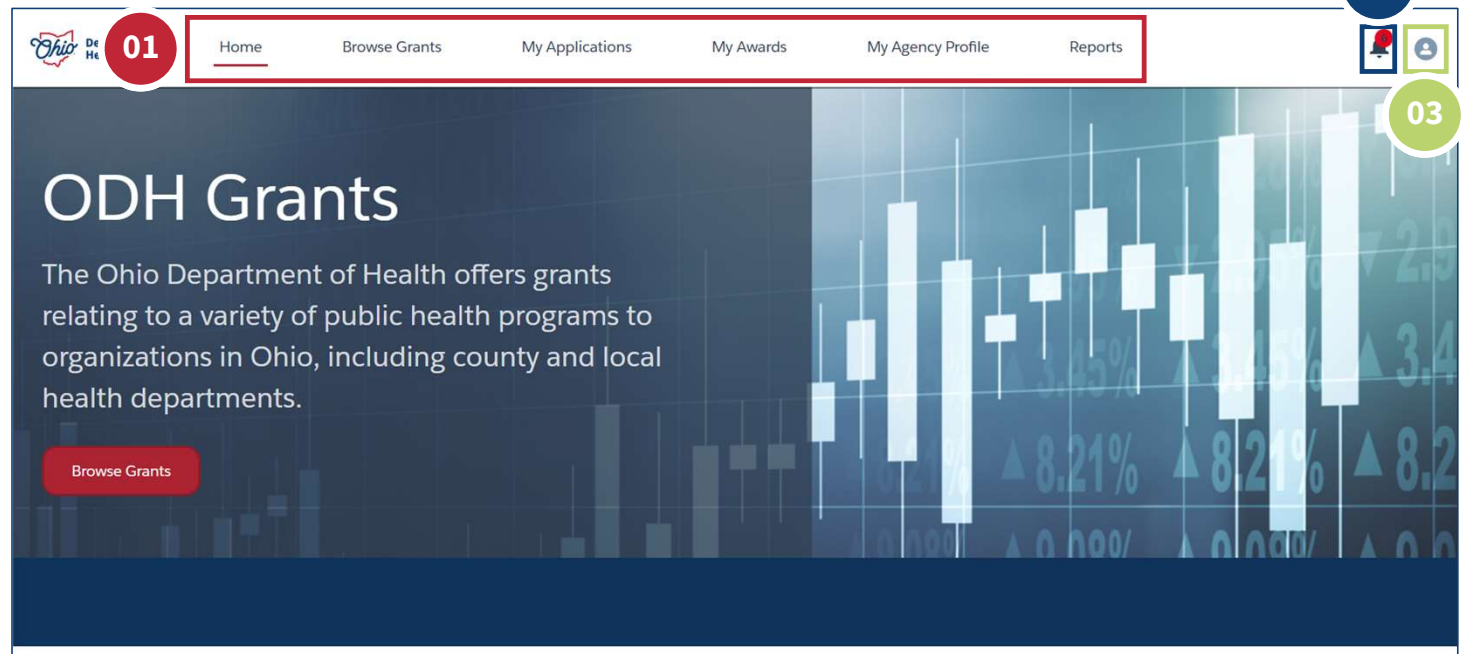
Programmatic Contact

Contact listed on a specific application or funding award. This individual will receive system notifications relating to that specific application or funding award.

General Orientation

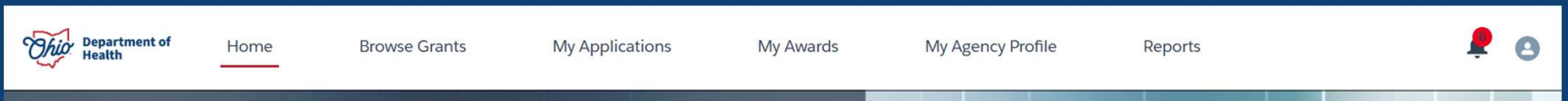
The banner across the top will appear no matter where you navigate in GMIS Portal.

1. **Navigation to Core Objects.**
2. **Notifications.**
3. **Profile.**



Navigation to Core Objects

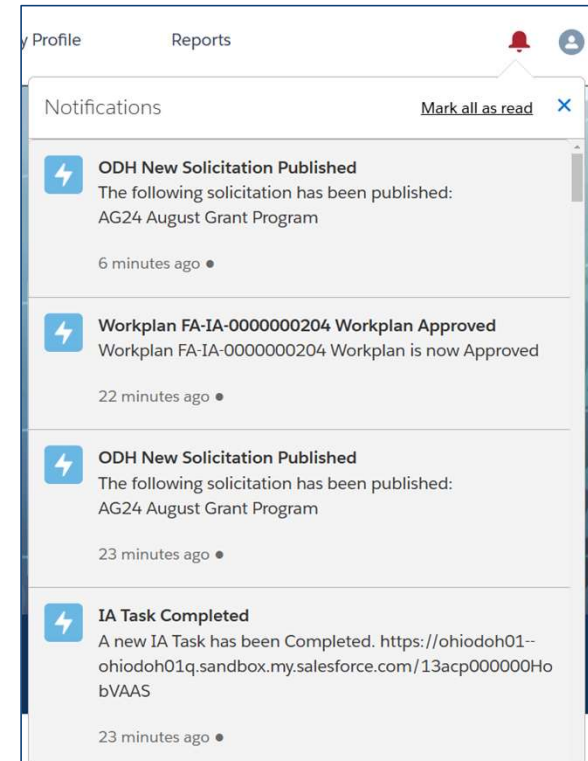
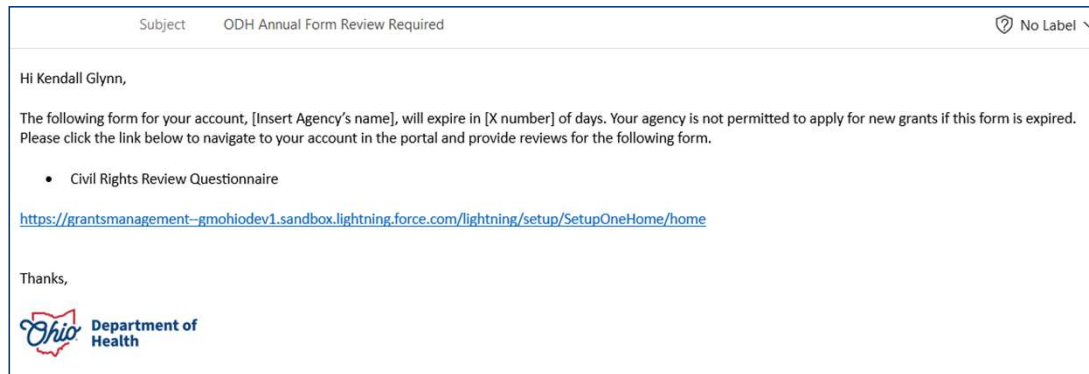
Use the core object buttons to quickly navigate GMIS Portal




Notifications

Agency users will get both in-app and email notifications
Some key notifications include (not exhaustive):

- Agency Forms About to Expire.
- In Draft Application Upcoming Due Date.
- Expense Report and Progress Report Due Date.



 View section 2.1 View All Notifications.

 Check your spam folder!

Items in the Footer

The footer can only be found on the GMIS Portal Homepage.

[ODH GRANTS SITE](#)

[TRAINING MATERIALS](#)

[POLICIES, PROCEDURES & ADDITIONAL
RESOURCES](#)

[CONTACT US](#)

Ohio Department of Health | 246 North High Street, Columbus, Ohio 43215

List Views

Use *List Views* to filter information on the page.

01

Solicitations

Recently Viewed

31 item

LIST VIEWS

Active Solicitations

1 All Solicitations

2 ☒ Recently Viewed

02

Search this list...

Settings

Refresh

Filter

Last Modified	Last Modified Date
9/17/2024, 1:12 PM	
9/17/2024, 1:26 PM	

GMIS Portal Homepage

The screenshot shows the GMIS Portal Homepage with the following sections and callouts:

- 01** Bulletin Board
- 02** Search Pending Acceptance
- 03** Upcoming & Overdue Grants Tasks
- 04** Upcoming and Overdue Expense Reports
- 05** Upcoming and Overdue Progress Reports

ACTIVE BULLETIN BOARD

Bulletin Board Name	Description	Year	Status
2027 Solicitations Released	Please Browse Grants to see the list of grants for 2027.		Active
New ODH GMIS Launching Early 2025	Please make sure you're checking your email often. GMIS Project communications will be coming from Grant Support.	2025	Active

PENDING ACCEPTANCE AWARDS

Funding Award Name	Solicitation	Status	Amount
05060014QC0225	QC25 Q - 11/26 Validation	Pending Acceptance	\$30,000.00

UPCOMING & OVERDUE GRANTS TASKS

Subject	Funding Award	Status	Description
253843 test	05060014JE1315	Open	

UPCOMING AND OVERDUE EXPENSE REPORTS


Name	Funding Award	Status	Due Date
Expense Report - Final	00220014JE0218	In Review	10/16/2024, 12:00 PM

UPCOMING AND OVERDUE PROGRESS REPORTS

Name	Funding Award	Status	Due Date
Month 1 2024 Progress Report	00220014S50124	In Review	9/5/2024, 4:00 PM

Bulletin Board

Bulletin Board Name	Description	Year	Status
2027 Solicitations Released	Please Browse Grants to see the list of grants for 2027.		Active
Reminder: Agency Forms Due in May	Make sure to complete your Agency Profile forms by May 30. These forms can be found on your Agency Forms under Pending Agency Forms. Please reach out to Grants.Support@odh.ohio.gov with any questions.		Active
Updated Scoring Rubric for 2025	There is a new scoring rubric which will be in effect starting January 1, 2025.		Active

 Bulletin Board

Updated Scoring Rubric for 2025

Bulletin Board Name

Updated Scoring Rubric for 2025

Year

Created By

, 11/22/2024, 3:24 PM

Description


There is a new scoring rubric which will be in effect starting January 1, 2025.

Status

Active

Last Modified By

, 11/22/2024, 3:24 PM

 Files (1)

Add Files

Updated Rubri...

Nov 22, 2024 •...

View All

Need help? Access our training resources here.

Core Grant Objects



Audience: Agency Users

My Agency Profile

Once an Agency User has logged into the GMIS Portal, they can view details of their agency profile.

Step 01


Select 'Agency Profile'. Please note, this might be under 'More'.


The screenshot displays the Ohio Department of Health's GMIS Portal. The top navigation bar includes links for Home, Browse Grants, My Applications, My Awards, and My Agency Profile. The 'My Agency Profile' link is highlighted with a red box and a red circle containing the number '01'. Below the navigation bar, the main content area features a header for 'ODH Grants' with a description: 'The Ohio Department of Health offers grants relating to a variety of public health programs to organizations in Ohio, including county and local health departments.' Below this, there is a section for 'Fairfield County Health Dept' with an 'Edit' button. The section contains fields for Agency Type (County Agency), Office Phone Number ((716) 904-1564), and ICQ Risk Level (Low). Below these fields, there is a tabbed interface with five tabs: 'Agency Details', 'Agency Contacts', 'Pending Agency Forms', 'Files', and 'Agency Forms'. The 'Agency Details' tab is selected and highlighted with a red box and a red circle containing the number '02'. The 'Agency Details' tab shows fields for Account Name (Fairfield County Health Dept), Agency Type (County Agency), Employer Identification Number (EIN) (784392789), and Unique Entity ID (UEI) (439820894023).

Step 02





View the information found on *Agency Details*, *Agency Contacts*, *Pending Agency Forms*, *Files*, and *Agency Forms* tabs for accuracy

Browse Grants

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

02 Solicitations
Active Solicitations 

50+ Items • Sorted by Name • Filtered by All solicitations • Status • Updated 2 minutes ago

	Name ↓	Program Type	Grant T...	Amount Available	Budget Perio...	Budget...
22	QR2024 QA Subgrant Sprint 4: Bureau of HIV, STI and Hepatitis	Hybrid	Competitive	\$500,000	8/16/2024	7/16/2025
23	QA2024 QA Subgrant: Bureau of Informatics, Data, Epidemic	Hybrid	Competitive	\$50,000	7/1/2024	12/31/2024
24	QA2024 QA Subgrant: Bureau of Health Preparedness	0% Reimburseme...	Competitive	\$50,000	7/1/2024	12/31/2024
25	QA2024 QA Subgrant: Bureau of Health Improvement and Wem.....	100% Deliverable	Competitive	\$50,000	7/1/2024	12/31/2024
26	PE2024 QA Subgrant: Center of Public Health Excellence	Hybrid	Competitive	\$50,000	7/1/2024	12/31/2024
27	OH2026 Integration of Oral Health into Prenatal Care Program	Hybrid	Competitive	\$5,000,000	9/30/2025	10/1/2024
28	OA2025 Integration of Oral Health into Prenatal Care Program	Hybrid	Competitive	\$10,000,000	8/1/2024	7/31/2025
29	JI2024 QA Subgrant Sprint 5 HIVP1	Hybrid	Competitive	\$50,000,000	9/16/2024	9/16/2025
30	IF2024 QA Subgrant: Bureau of Infectious Diseases	100% Deliverable	Competitive	\$50,000	7/1/2024	12/31/2024
31	HP2024 QA Subgrant: Bureau of HIV, STI and Hepatitis	100% Reimburseme...	Competitive	\$1,000,000	7/31/2024	7/31/2025

03



Click the name of the Solicitation to open.

View a Solicitation

01

SP2025 Integration of Oral Health into Prenatal Care Program

Description

Appendices

Deliverables

Version History

Opportunity Description:

Oral health should be a routine part of prenatal care as poor oral health can lead to poor health outcomes for the mother and her baby. Up to 75% of women develop gingivitis during pregnancy due primarily to hormonal changes. Left unchecked, gingivitis can progress to periodontal disease (PD) which affects up to 40% of all pregnant women. Emerging evidence shows an association between PD and low birth weight and preterm birth although this association is not yet consistent across studies or clearly understood. More certain is that women are at risk for tooth decay during pregnancy due to changes in eating habits, frequent bouts of morning sickness and possibly less attention being paid to their oral hygiene practices.

In addition, the oral health of mothers directly impacts the oral health of their children. Babies are not born with the bacteria that cause tooth decay in their mouths. Those bacteria are transmitted, usually by the mother, through kissing, the use of shared eating utensils, or other common behaviors. Mothers who have a high number of untreated cavities have a high level of decay-causing bacteria and transmit high levels of the bacteria to their children, which then puts them at higher risk for cavities themselves. To impact the number of young children who develop tooth decay, efforts must be directed to ensure that pregnant women have good oral health and know how to positively impact their children's oral health from birth.

Eligibility Requirement:

Eligible Agency Types:

- Not for Profit
- Higher Education
- Hospitals
- County Agency
- City Agency

02

Opportunity Details

Accepting Applications:

Apply

Program Code: SP

Grant Type: Competitive

Total Funding: \$1,000,000.00

Max Funding Amount: \$500,000.00

Min Funding Amount: \$50,000.00

Important Dates

7/10/2024

 - Solicitation Posted Date

7/29/2024

 - Application Due Date/Time

7/31/2025

 - Budget Period Start Date

8/1/2024

 - Budget Period End Date

10/1/2024

 - Project Period Start Date

9/30/2025

 - Project Period End Date

03

Resources

[OHAP2025-Solicitation](#)

04

ODH Program Contact Information:

If you have questions or difficulty accessing the full announcement, please contact:

Name:

 Elizabeth Augustini

Phone:

Email:

 elizabeth.augustini@accenture.com

My Applications

01

02

Individual Applications
My Applications

33 items • Sorted by Application ID • Filtered by All individual applications - Subrecipient • Updated a few seconds ago

Search this list...

	Applicat... ↓	Solicitation	Application Status	Requested ...	Submitted Date
1	IA-0000000145	QR2024 QA Subgrant Sprint 4: Bureau of HIV, STI and Hepatitis	Draft	\$15,000.00	
2	IA-0000000155	BA2024 QA Subgrant Sprint 4: Health Improvement and Wellness	Awarded	\$3,000.00	8/20/2024, 11:37 A...
3	IA-0000000143	Subgrant: Bureau of HIV, STI and Hepatitis	Draft	\$100,000.00	
4	IA-0000000204	H52024 QA Sprint 5 20 Months: Bureau of HIV, STI and Hepatitis	Awarded	\$10,000.00	9/18/2024, 2:54 PM
5	IA-0000000089	IF2024 QA Subgrant: Bureau of Infectious Diseases	Submitted	\$2,500.00	7/30/2024, 8:40 AM
6	IA-0000000087	QA2024 QA Subgrant: Bureau of Informatics, Data, Epidemiology an...	Draft	\$10,000.00	

03

04



Click the Application ID to open.

Viewing an Application

01

Individual Application
Bi-annual 20 month

+ Follow Withdraw Application

Project Key 00220011SS0125	Requested Amount \$50,000.00	Submitted Date	Subrecipient Ohio QA Test 7
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02

Draft Submitted Review in Progress

03

Application Workspace Solicitation Details Application Details Budget Workplan Files Appendices Funding Award


04



Initial Planning Application

Legal Terms	SECTION STATUS Completed	05
Project Detail	SECTION STATUS Completed	Review
Form List	SECTION STATUS Completed	Review/Update
Budget	SECTION STATUS Not Completed	Review/Update
Program Income	SECTION STATUS Not Completed	Review/Update
Cost Sharing	SECTION STATUS Not Completed	Review/Update
Additional Documents	SECTION STATUS Not Completed	Review/Update










Submit My Application

My Awards

 Home Browse Grants My Applica**01** My Awards My Agency Profile Reports

02  Funding Awards All Awards 

20 Items • Sorted by Funding Award Name • Filtered by All funding awards • Status • Updated a minute ago


	<input type="checkbox"/> Funding Awar... 	Status 	Solicitation 	Amount 	03
1	<input type="checkbox"/> 00220011BA0124	Funded	BA2024 QA Subgrant Sprint 4: Health Improvement and Wellness	\$15,000.00	
2	<input type="checkbox"/> 00220014S50124	04 Pending Acceptance	S52024 QA Sprint 5 12 Months: Bureau of HIV, STI and Hepatitis	\$10,000.00	
3	<input type="checkbox"/> 00220014S50124	Pending Acceptance	S52024 QA Sprint 5 12 Months: Bureau of HIV, STI and Hepatitis	\$10,000.00	
4	<input type="checkbox"/> 00220014D50124	Funded	D52024 QA Sprint 5 13 Months: Bureau of HIV, STI and Hepatitis	\$10,000.00	
5	<input type="checkbox"/> 00220014F50124	Funded	F52024 QA Sprint 5 14 Months: Bureau of HIV, STI and Hepatitis	\$10,000.00	



Click the Funding Award ID to open.

Funding Award

01

 Funding Award
00220011BA0124

Accept / Decline NOAWithdrawal

Programmatic Contact Person	Subrecipient	Amount	Status
<u>Ben Low</u>	<u>Ohio QA Test 7</u>	\$15,000.00	Funded

DetailsWorkplanBudgetExpense ReportsProgress ReportsDeliverablesTasksFiles

Funding Award Name

00220011BA0124

Solicitation

BA2024 QA Subgrant Sprint 4: Health Improvement and Wellness

Status

Funded

Individual Application

IA-0000000156

Owner Name

Amount

\$15,000.00

Programmatic Contact Person




Ben Low

Subrecipient

Ohio QA Test 7

02

Reporting

 Home Browse Grants My Applications My Awards My Agency Profile **Reports** 01  

Reports

All Reports

2 Items

02

REPORTS



- Recent
- Created by Me
- Private Reports
- All Reports**

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Report Name	Description	Folder	Created By	Created On	Subscribed
PLACEHOLDER - All Buc	Placeholder Report - Displays all Budget Allocations	Subrecipient Reports		9/13/2024, 9:26 AM	03 
PLACEHOLDER - All Exp	Placeholder Report to display all Expense Reports	Subrecipient Reports		9/13/2024, 9:27 AM	



View Reporting 101 Video and Job Aid for details on reporting.

Chatter

Use Chatter to communicate directly with ODH.

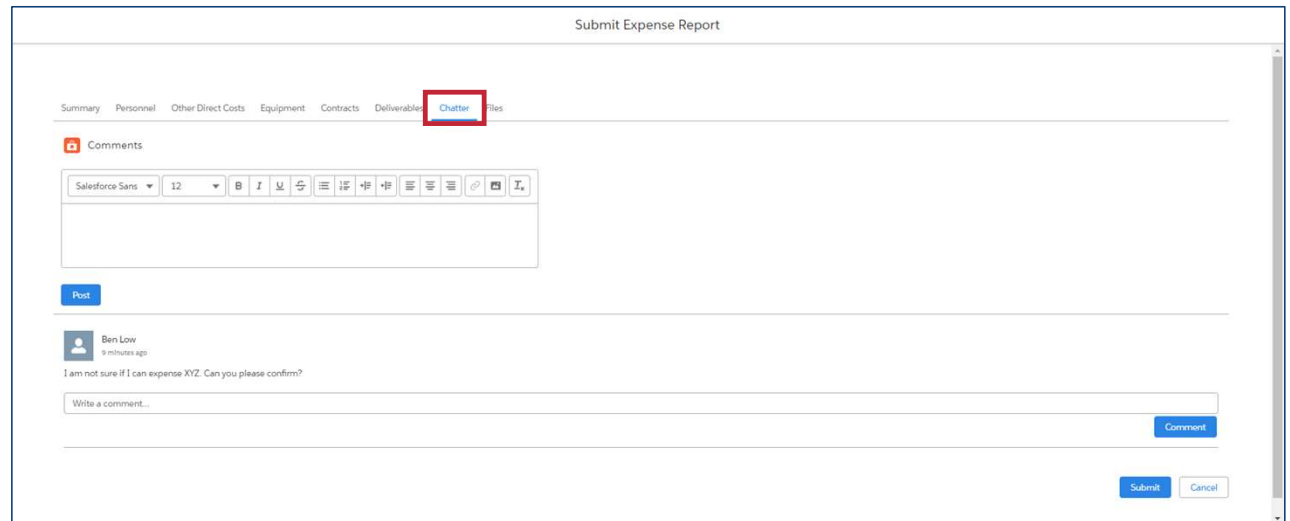
Where to find Chatter:

Funding Award

Expenditure Reports

Progress Reports

Budget Revisions



The screenshot displays the 'Submit Expense Report' interface. At the top, a navigation bar includes tabs for Summary, Personnel, Other Direct Costs, Equipment, Contracts, Deliverables, Chatter, and Files. The 'Chatter' tab is highlighted with a red box. Below the navigation bar, the 'Comments' section is visible, featuring a text input area with a rich text editor toolbar (including options for font color, size, bold, italic, underline, link, and image) and a 'Post' button. A comment from 'Ben Low' is shown, stating 'I am not sure if I can expense XYZ. Can you please confirm?'. Below this, there is a 'Write a comment...' input field and a 'Comment' button. At the bottom right, there are 'Submit' and 'Cancel' buttons.

GMIS Portal Agency Registration

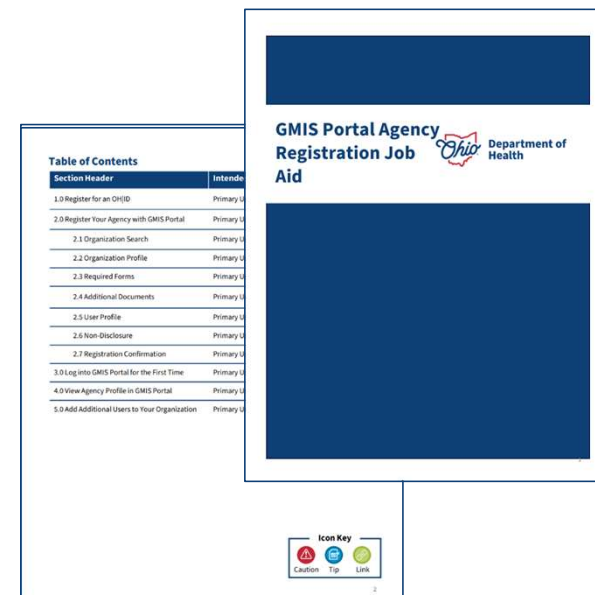


Audience: Primary & Secondary Agency Users

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:

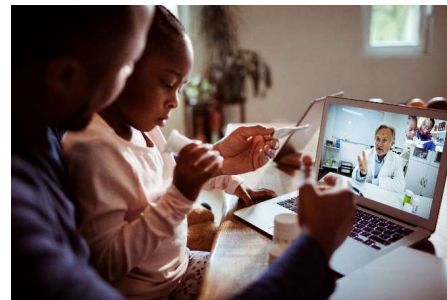
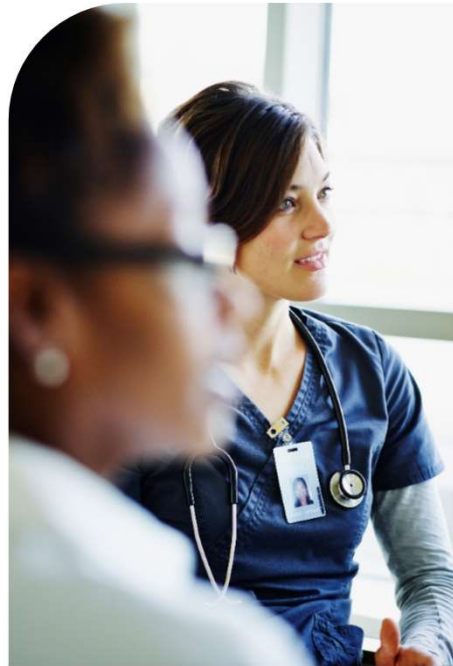
- **1.0 OHID Registration.**
- **2.0 Register Your Agency with GMIS Portal.**
- **3.0 Log Into GMIS Portal for the First Time.**
- **4.0 Viewing Agency Profile in GMIS Portal.**
- **5.0 Adding Additional Users to Your Organization.**



View *GMIS Portal Agency Registration* job aid.

Learning Objectives

- ✓ Demonstrate skills to initially register as an Agency User in the Ohio Department of Health (ODH) Grant Management System (GMIS) Portal.
- ✓ Prepare to login to GMIS Portal following Agency User approval for the first time.
- ✓ Review Agency Profile and functions.
- ✓ Create additional user(s) within the Agency profile.



Key Terms

ODH

Ohio Department of Health. Owner of the Grant Management Information System (GMIS).

GMIS & GMIS Portal

Grants Management Information System. Contains both an external Agency User view (GMIS Portal) and internal ODH employee view (GMIS).

Primary User

Priority Agency User with the most permissions who should register their organization; can control applications on solicitations, and edit their Agency profile.

Secondary User

Additional Agency User with limited permissions compared to a Primary User; can view solicitations and complete parts of an application. Can edit reports for active grants.

OAKS

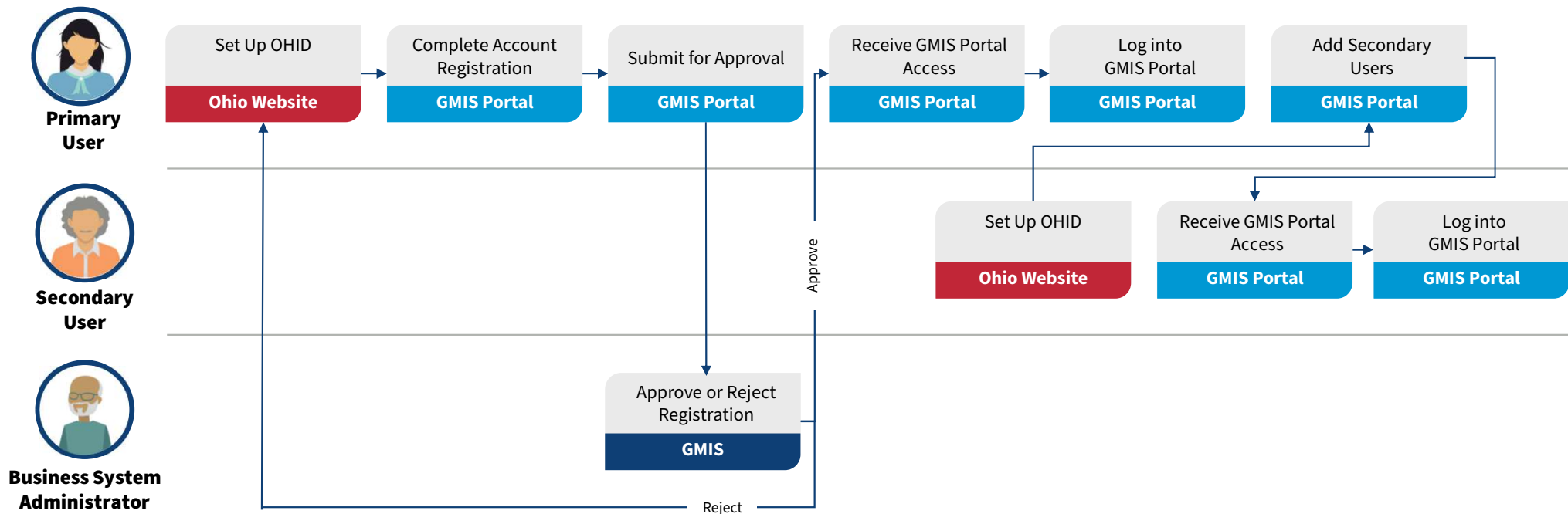
Ohio Administrative Knowledge System. A statewide, web-based system to keep track of financial, human resource, and payroll operations.

OH|ID Account Number

This is required for users in the Grants Portal system. Users must register for this separately at: <https://ohid.ohio.gov/wps/portal/gov/ohid/create-account/create-account>

Agency Account Registration Process

Here is a high-level overview for when a Primary User registers their Agency with Ohio Department of Health Grants.



Agency Registration



Audience: Primary Agency Users

OH|ID

An OH|ID is required for anyone at the Agency who will access GMIS Portal.

If you DO NOT have an OH|ID

Please email grant.support@odh.ohio.gov with the following information:

1. First & Last Name.
2. Agency.
3. Email Address.
4. Address and.
5. Phone Number.

If you DO have an OH|ID

You do not need to email. Please locate your login information.



View section 1.0 Register for an OH|ID.

Agencies must register with GMIS Portal for the first time

The screenshot shows the Ohio Department of Health Grants website. At the top left is the Ohio Department of Health logo. The navigation bar includes links for Home, Browse Grants (highlighted with a red box and a red circle with the number 1), and Login | Register (highlighted with a red box and a red circle with the number 2). The main content area features the heading "ODH Grants" and a description: "The Ohio Department of Health offers grants relating to a variety of public health programs to organizations in Ohio, including county and local health departments." Below this text is a red "Browse Grants" button, also highlighted with a red box and a red circle with the number 1. The background of the main content area is a dark blue graphic with white and light blue bar charts and line graphs. At the bottom of the page is a white footer with four links: [ODH GRANTS SITE](#), [TRAINING MATERIAL](#), [POLICIES, PROCEDURES & ADDITIONAL RESOURCES](#), and [CONTACT US](#).

Do I Need To Register My Agency At Go-Live?

This is still to be decided! Some will have to register, and some will not. We will have more information on this in future communications. Keep an eye out on your email!



First Time GMIS Portal Registration – EIN and UEI

Agencies will need to search for their organization by entering in the Employer Identification Number (EIN) and Unique Entity ID (UEI).

Step 01

Enter the Employer Identification Number (EIN).

Step 02

Enter the Unique Entity ID (UEI).

Step 03

Search.

Step 04

Create New Organization.

The screenshot illustrates the 'Organization Search' process in the GMIS Portal. At the top, a progress bar shows seven steps: Organization Search (1), Organization Profile (2), Required Forms (3), Additional Documents (4), User Profile (5), Non-Disclosure (6), and Confirmation (7). The main heading is 'Organization Search'. Below it, a message states: 'To begin, please search for your organization by entering in the Employer Identification Number (EIN) and the Unique Entity ID (UEI) and click the search button. If no result populates, please click on the Create Organization button to proceed.'

Step 01 points to the 'Employer Identification Number (EIN)*' input field. Step 02 points to the 'Unique Entity ID (UEI)*' input field. Step 03 points to the 'Search' button. Step 04 points to the 'Create New Organization' button.

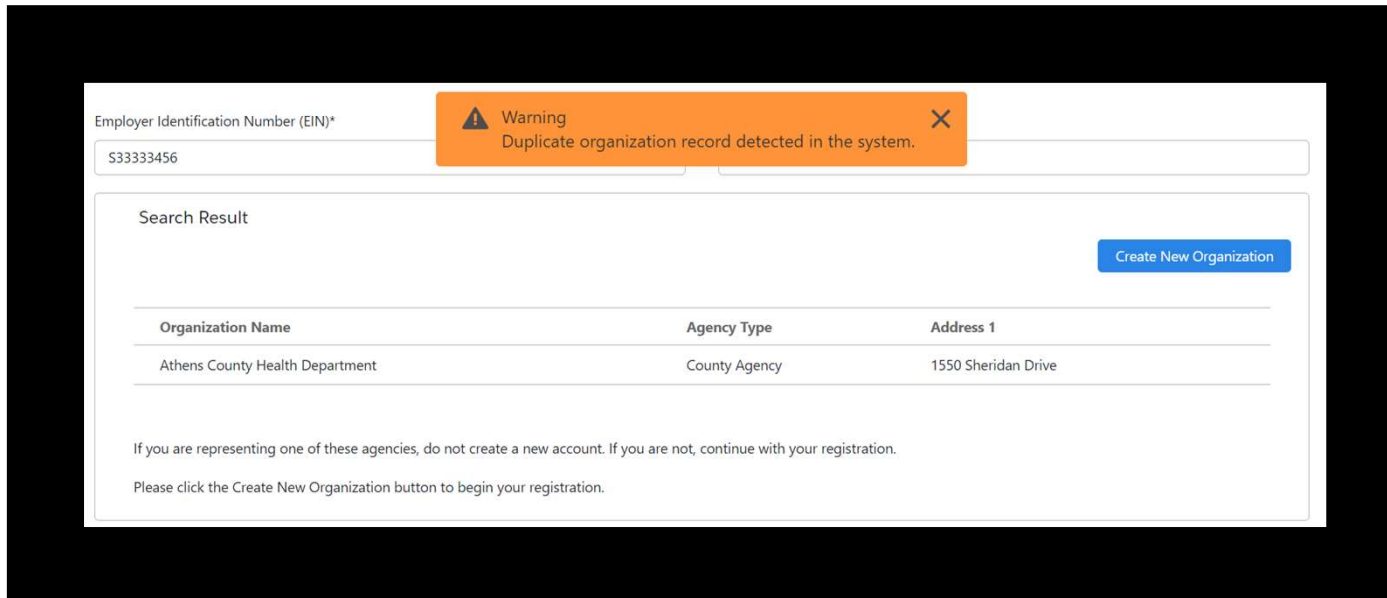
The bottom section shows the results of a search. The 'Employer Identification Number (EIN)*' field contains '784392789' and the 'Unique Entity ID (UEI)*' field contains '439820894023'. Below these fields, the 'Search Result' area is empty. A message at the bottom states: 'We were unable to find your organization in our records. Please click the Create New Organization button to begin your registration.'



View section 2.1 Organization Search.

Agency Already Registered?

If the Agency has previously been registered in the Ohio Grants Portal (GMIS), there will be a warning that the organization is already registered. Please reach out to your Agency's Primary User to be added as a user.



The screenshot shows a web form for organization registration. At the top, there is a text input field for "Employer Identification Number (EIN)*" containing the value "S33333456". To the right of this field is an orange warning box with a triangle icon, the text "Warning Duplicate organization record detected in the system.", and a close button (X). Below the EIN field is a "Search Result" section. It contains a table with three columns: "Organization Name", "Agency Type", and "Address 1". The table has one row of data: "Athens County Health Department", "County Agency", and "1550 Sheridan Drive". To the right of the table is a blue button labeled "Create New Organization". Below the table, there is a paragraph of text: "If you are representing one of these agencies, do not create a new account. If you are not, continue with your registration. Please click the Create New Organization button to begin your registration."

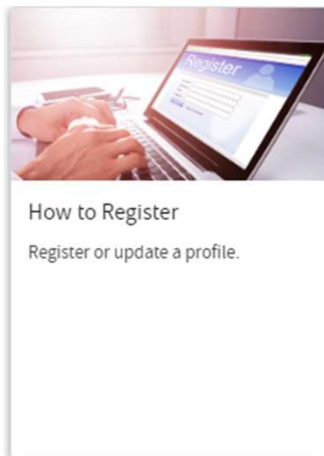
Organization Name	Agency Type	Address 1
Athens County Health Department	County Agency	1550 Sheridan Drive

First Time GMIS Portal Registration – Supplier Portal Information

Agencies will need to input their Payee (Supplier ID), Address Number, and Payment Location as categorized by the State of Ohio Supplier Portal/OAKS.

Not registered in OAKS?

Register on [OhioPays](#) or call (614) 338-4781



OAKS Information on Organization Profile

01	County* --Select the Item--	Zip Code*
02	Payee (Supplier) ID	Payment Location
	Address Number	Congressional District*
District Maps - Ohio Secretary of State(ohiosos.gov)		
		Back Continue



View section 2.2 Organization Profile.



First Time Registration – Congressional District

Agencies will need to input their Congressional District on their Organization Profile as categorized by the District Maps released by the Ohio Secretary of State.

Step 01

Select the link to access the District Maps lookup.

Step 02

Select U.S. Congressional Districts.

Step 03

Enter primary business address into the search bar to find current districts.

County*
--Select the Item--

Zip Code*

Payee (Supplier) ID

Payment Location

Address Number

Congressional District*

District Maps - Ohio Secretary of State(ohiosos.gov)

01

Back Continue

DISTRICT MAPS

FIND MY DISTRICT

02

CURRENT DISTRICTS LOOKUP

U.S. CONGRESSIONAL DISTRICTS OHIO HOUSE DISTRICTS OHIO SENATE DISTRICTS STATE BOARD OF EDUCATION DISTRICTS

Frank LaRose
Ohio Secretary of State

Type your address...

Map Satellite

House Districts Senate Districts Congressional Districts Education Districts

2024 Districts 2025 Districts

To find your current districts, type your address in the search bar above.

03

Ohio Department of Health



Required Forms

Several required forms need to be uploaded or may require requested information to be filled in.

- Financial Audit.
- Civil Rights Review Questionnaire.
- Health Equity Questionnaire.
- Assurances.
- Federal Funding Accountability and Transparency Act Reporting Form (FFATA).
- Compliance ICQ.

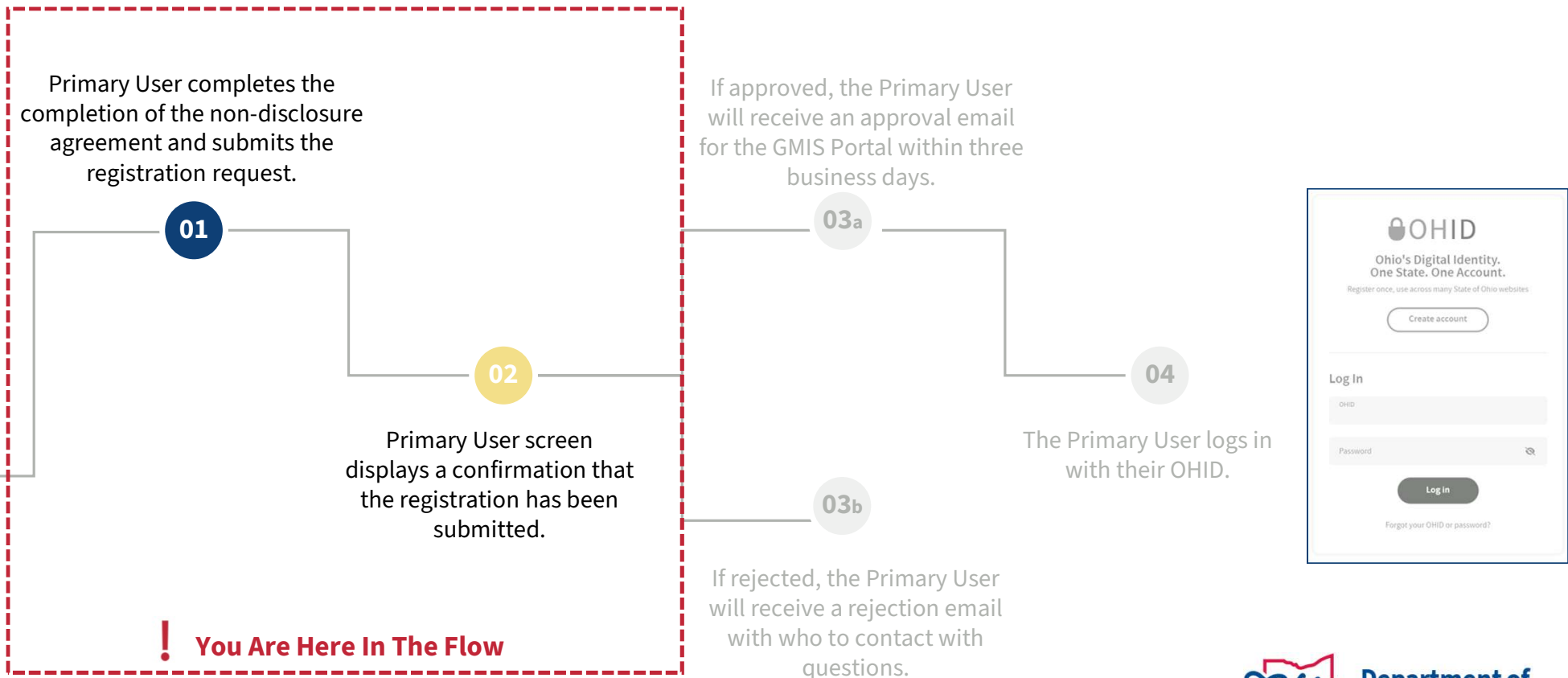


Required Forms are NOT needed to complete registration

The Agency does not need to complete the required forms at this time, they can scroll down to the bottom and click "Continue" so they can complete their registration.

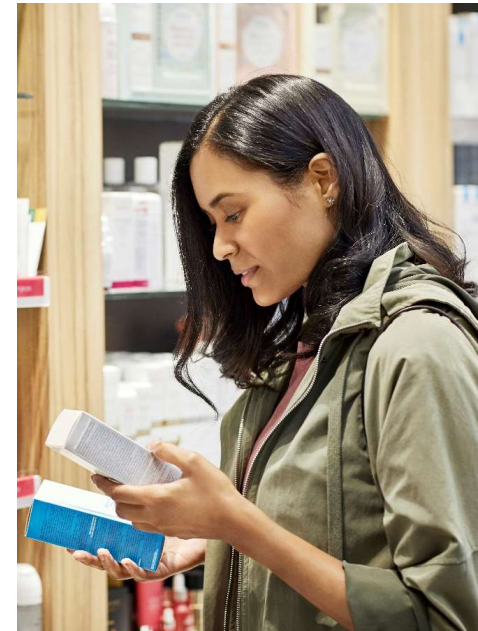
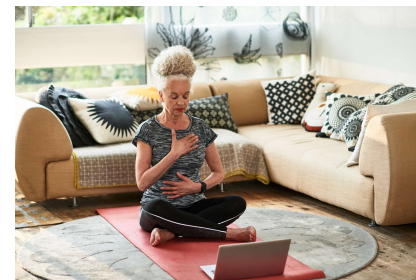
The required forms become required once an Agency applies for a grant.

First Time Primary User Registration Confirmation Process



Key Takeaways

- When registering, the system will notify Agencies if their organization already has a profile with ODH; each organization should only have one account in the GMIS Portal.
- The Agency does not need to complete the required forms at the time of registration. The required forms become required once an Agency applies for a grant.



Add Additional Users to Agency Profile



Audience: Primary Agency Users



All Contacts Have To Be Added By A Primary User

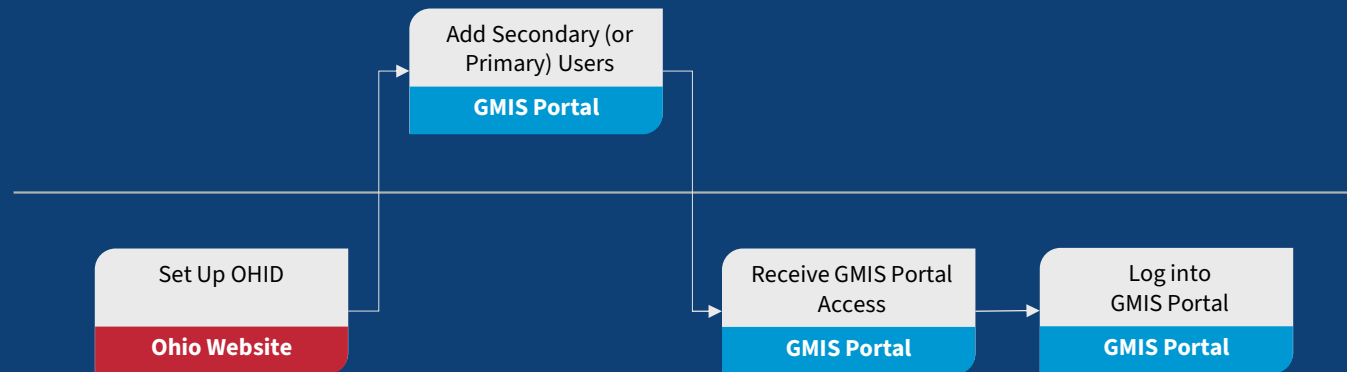
This is because there is not an approval process when adding secondary users. Additional users will automatically get login information if “Access to the Portal” is selected.



Primary User



Secondary User



Primary Users can add other Primary Users! There must be a minimum of 2 and maximum of 4 per Agency.



View section 5.0 Add Additional Users to Your Organization.



When Adding a Primary or Secondary User

3 checkboxes to watch out for:

Subrecipient Portal Access

Select this checkbox to give the user access to the subrecipient GMIS Portal.

Agency Head

Select this checkbox if the user is an Agency Head – there may only be one per organization.

Active At Organization

Select this checkbox if the user is currently at the organization- automatically create a user and send welcome/credentials email to the new user.

The screenshot shows a user addition form with the following fields and checkboxes:

- User Role:** A dropdown menu currently showing "--None--".
- Phone:** A text input field containing "7169041564".
- Account Name:** A text input field containing "Fairfield County Health Dept" with a Facebook icon on the left and a close button (X) on the right.
- Subrecipient Portal Access:** A checkbox, highlighted with a green border.
- Agency Head:** A checkbox, highlighted with a blue border.
- Active at Organization:** A checkbox, highlighted with a red border.

At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

View Agency Profile



Audience: Primary & Secondary Agency Users

View Agency Profile

Once an Agency User has logged into the GMIS Portal, they can view details of their agency profile.

Step 01

Select 'My Agency Profile'.

Step 02

View the information found on *Agency Details*, *Agency Contacts*, *Pending Agency Forms*, *Files*, and *Agency Forms* tabs for accuracy.

01

Department of Health | Home | Browse Grants | My Applications | My Awards | **My Agency Profile** | Reports

Account: Ohio QA Test 7 [Edit]

Agency Key: 0506001	Agency Type: County Agency	Office Phone Number: (234) 234-2345	ICQ Risk Level: Low
---------------------	----------------------------	-------------------------------------	---------------------

02

Agency Details | Agency Contacts | Pending Agency Forms | Files | Agency Forms | Invoices

Account Name: Ohio QA Test 7	Agency Type: County Agency
Employer Identification Number (EIN): DDD123456	Unique Entity ID (UEI): DDD123456789
Congressional District: 12	ICQ Risk Level: Low
Agency Fiscal Year End Date: 08/31	Audit Cycle: Annual
Cash/Accrual: Cash	

✓ Contact Information

Office Phone Number: (234) 234-2345	Alternate Telephone Number:
-------------------------------------	-----------------------------



View section 4.0 Viewing Agency Profile in GMIS Portal.

Remember Those Required Forms?

Recall: The Agency did not need to complete the required forms during registration, but could return to them later, if it was prior to a grant application.



Access those forms here!

Select the 'Pending Agency Forms' tab to see any outstanding forms for submission.

Agency Key 0506001	Agency Type County Agency	Office Phone Number (234) 234-2345	ICQ Risk Level Low
-----------------------	------------------------------	---------------------------------------	-----------------------

Agency Details	Agency Contacts	Pending Agency Forms	Files	Agency Forms	Invoices
-----------------------	-----------------	-----------------------------	-------	--------------	----------

Account Name Ohio QA Test 7	Agency Type County Agency
Employer Identification Number (EIN) DDD123456	Unique Entity ID (UEI) DDD123456789
Congressional District 12	ICQ Risk Level Low
Agency Fiscal Year End Date 08/31	Audit Cycle Annual

First Time GMIS Portal Login



Audience: Primary & Secondary Agency Users

First Time Primary User Registration Confirmation Process

! You Are Here

Primary User completes the completion of the non-disclosure agreement and submits the registration request.

01

02

Primary User screen displays a confirmation that the registration has been submitted.

If approved, the Primary User will receive an approval email for the GMIS Portal within three business days.

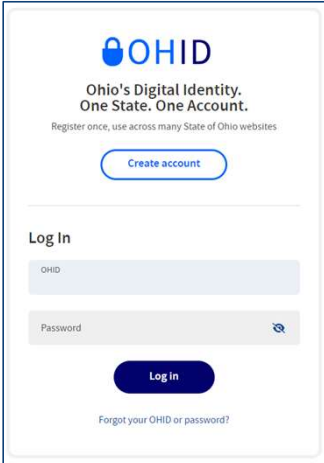
03a

03b

If rejected, the Primary User will receive a rejection email with who to contact with questions.

04

The Primary User logs in with their OHID.



View section 3.0 First Time GMIS Portal Login.

First Time Registration Confirmation Process

Primary User adds additional primary or secondary user to Agency Profile.

01



The new user will receive an approval email for the GMIS portal.

02



The new user logs into the GMIS portal with OHID.

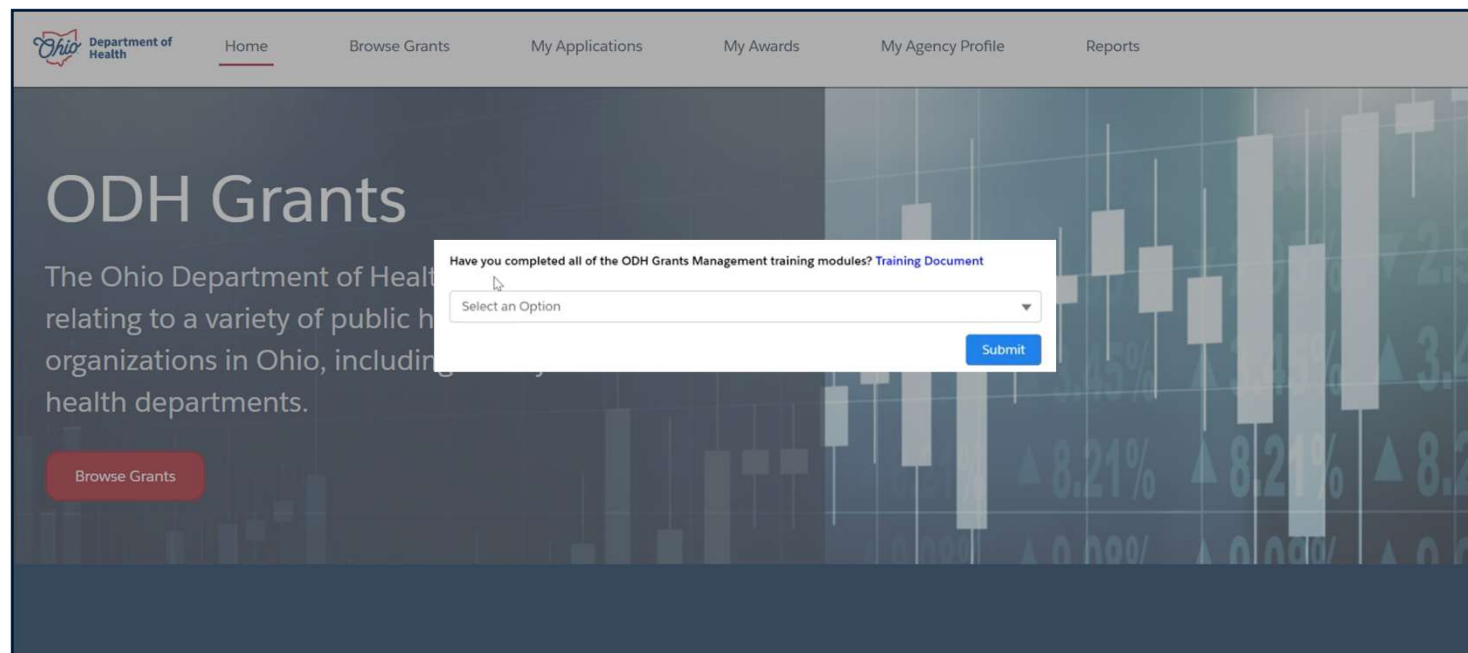
03



The email will be titled "Welcome to ODH Grants Portal."

Training Completion

After successful registration and login, the Agency User will be prompted to confirm they have completed all of the ODH Grants Training Materials prior to taking actions in the GMIS Portal.



The screenshot displays the ODH Grants portal interface. At the top, a navigation bar includes the Ohio Department of Health logo and links for Home, Browse Grants, My Applications, My Awards, My Agency Profile, and Reports. The main content area features the heading "ODH Grants" and a descriptive paragraph about the department's role in public health. A modal dialog box is centered on the screen, asking the user if they have completed all ODH Grants Management training modules. The dialog includes a dropdown menu with "Select an Option" and a "Submit" button. A "Browse Grants" button is visible in the bottom left of the main content area.

Ohio Department of Health

Home Browse Grants My Applications My Awards My Agency Profile Reports

ODH Grants

The Ohio Department of Health... relating to a variety of public health... organizations in Ohio, including... health departments.

Browse Grants

Have you completed all of the ODH Grants Management training modules? [Training Document](#)

Select an Option

Submit

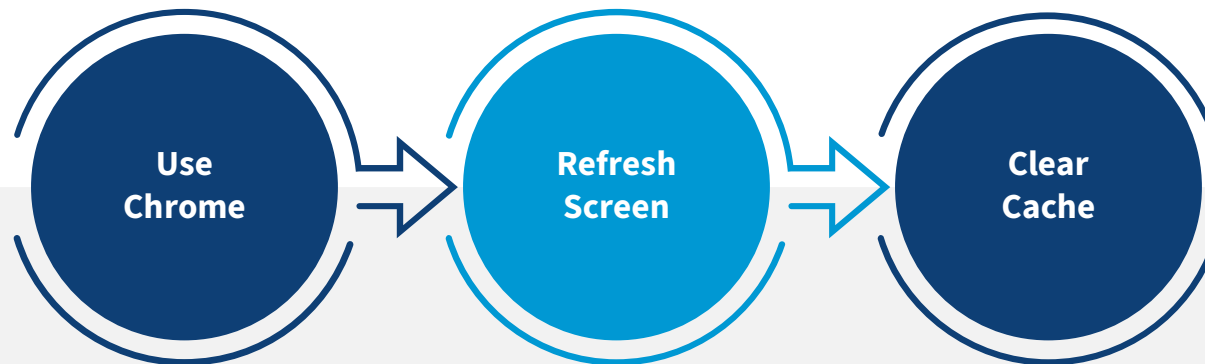
Additional Support



Audience: Agency Users

GMIS Portal Troubleshooting

Complete these actions before reaching out to ODH with your GMIS Portal issue.



On Demand Training

Access the ODH Website to view all training materials for GMIS Portal

GMIS Portal On-Demand Training	
Capability	Materials
GMIS Foundations	GMIS Glossary Job Aid GMIS Portal 101 Video GMIS Portal Reporting Video GMIS System Access and Navigation Job Aid GMIS Reporting Job Aid
Agency Profile	GMIS Portal Agency Registration Video GMIS Portal Agency Registration Job Aid
Application	GMIS Portal Grant Application Submission Video GMIS Portal Grant Application Submission Job Aid
Notice of Award	GMIS Portal Notice of Award, Budget Revision and Workplan Revision Video GMIS Portal Notice of Award, Budget Revision and Workplan Revision Job Aid
Expenditure Reporting	GMIS Portal Expenditure Reporting Video GMIS Portal Expenditure Reporting Job Aid
Progress Reporting	GMIS Portal Progress Reporting, including Site Visits Video GMIS Portal Progress Reporting, including Site Visits Job Aid
Audit & Compliance	GMIS Portal Audit & Compliance Video GMIS Portal Audit & Compliance Job Aid
Close-Out	GMIS Portal Close-Out Video GMIS Portal Close-Out Job Aid

Where to Go for Support

Access On-Demand Content on the ODH Website:

Grants Management Information System (GMIS) Portal

- [GMIS Portal Training](#)
- [GMIS Portal Transition Overview](#)
- GMIS & GMIS Portal [Transition Plan by Solicitation \(Legacy vs. New\)](#)
- [GMIS Portal External Frequently Asked Questions](#)
- [GMIS Portal Expenditure Reporting Job Aid](#)
- [GMIS Portal Agency Registration Job Aid](#)
- [GMIS Portal Grant Application Submission Job Aid](#)
- [GMIS Portal Progress Reporting Job Aid](#)

Questions on Solicitation or Application:

Reach out to ODH Program Contact listed on the Solicitation.

Questions on Funding Award, Expense Reports, Progress Reports, or Budget Revisions:

Reach out via Chatter in GMIS Portal.

All other queries:

Email grant.support@odh.ohio.gov.

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!