

REVIEWING APPLICATIONS

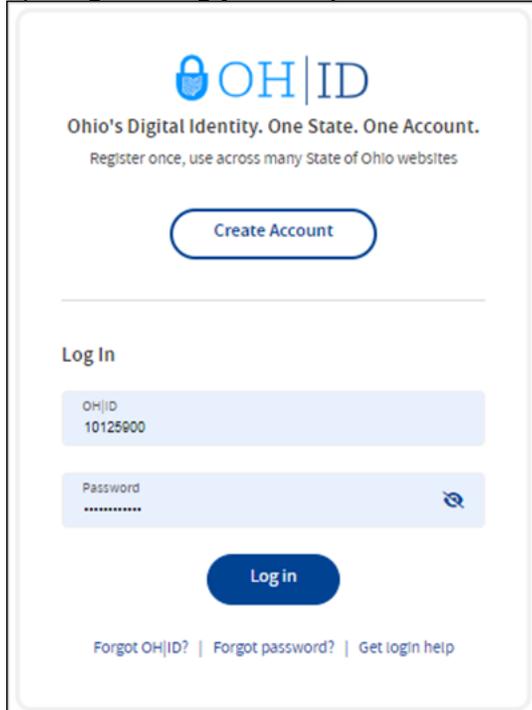
The Grants Portal allows agency users the ability to review and approve applications in one location. This job aid provides an overview of how to evaluate the applications collected in the Grants Portal. The specific review and approval/denial criteria should be determined and retained by each agency.

Using the Portal

To begin using the Portal, the State of Ohio agency user will log into the site using their OH|ID.

Reviewing Applications

- 1) Log into the **Grants Portal**.
 - Open <http://grantsportal.ohio.gov>.
- 2) Log in using your **OH|ID credentials**.

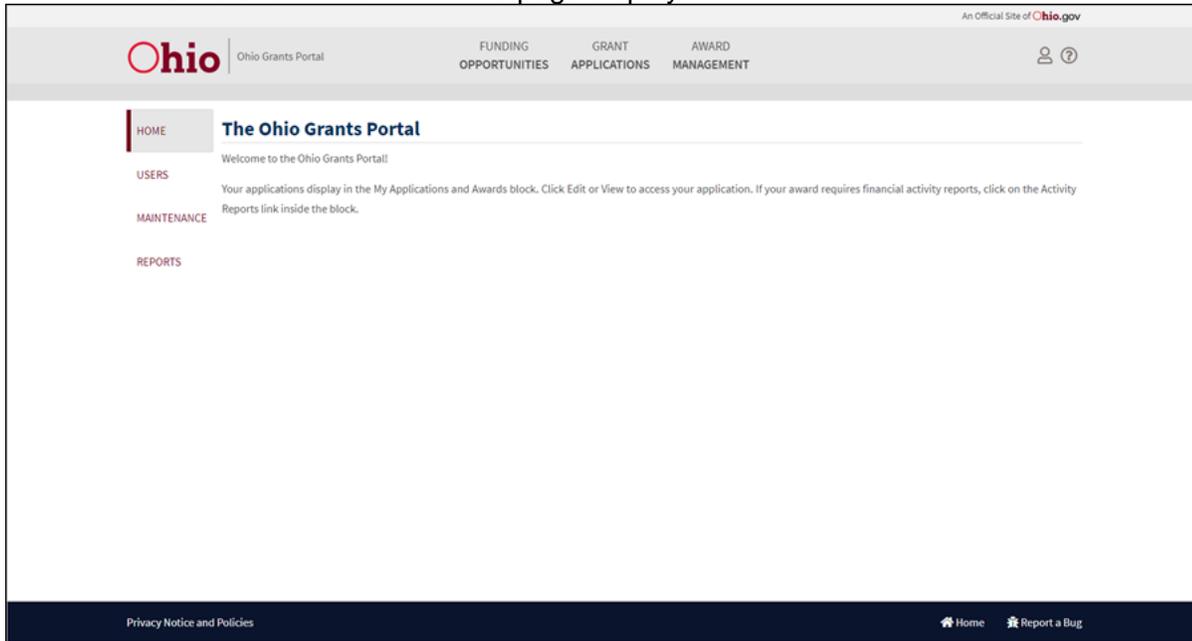


The screenshot shows the OH|ID login interface. At the top, there is the OH|ID logo with a blue padlock icon, followed by the text "Ohio's Digital Identity. One State. One Account." and "Register once, use across many State of Ohio websites". Below this is a "Create Account" button. A horizontal line separates the registration section from the login section. The login section is titled "Log In" and contains two input fields: "OH|ID" with the value "10125900" and "Password" with masked characters. A "Log in" button is positioned below the password field. At the bottom, there are links for "Forgot OH|ID?", "Forgot password?", and "Get login help".



REVIEWING APPLICATIONS

- The Ohio Grants Portal Home page displays.

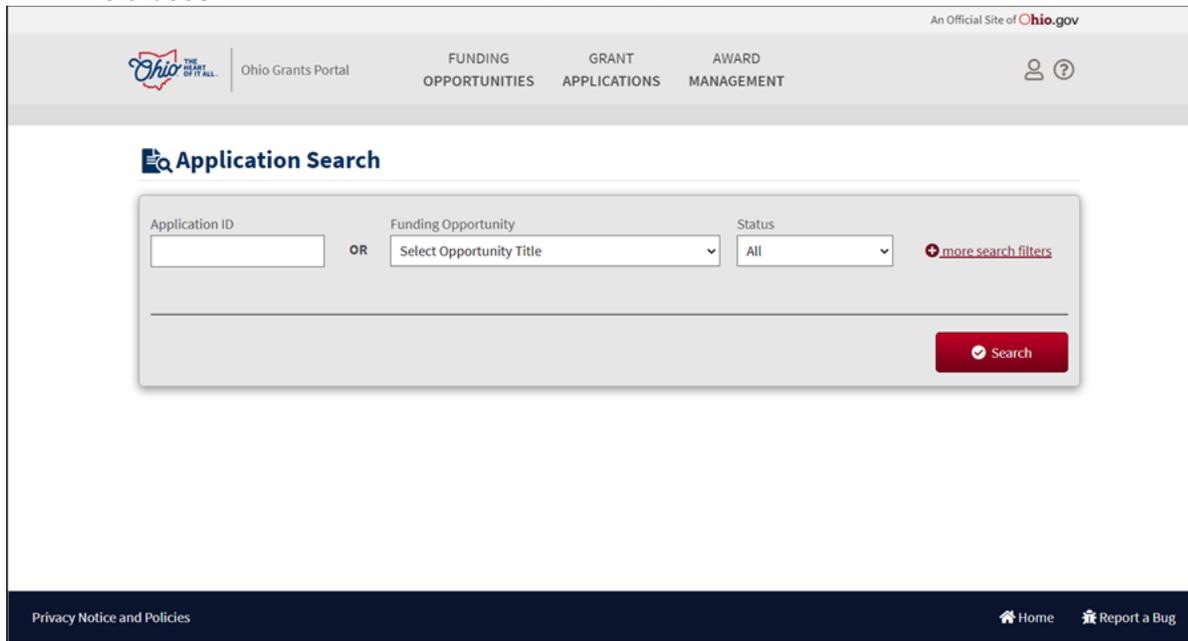


- 3) Select **Grant Applications** from the top menu.



REVIEWING APPLICATIONS

- 4) The Application Search page displays. Select the funding opportunity title from the **Funding Opportunity** dropdown.
- Selections in the other filter criteria are not required to view the list but can be used to target certain applications.
 - Select “All” from the Status dropdown to search for everything, but draft and “sent back” statuses.



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Ohio Grants Portal

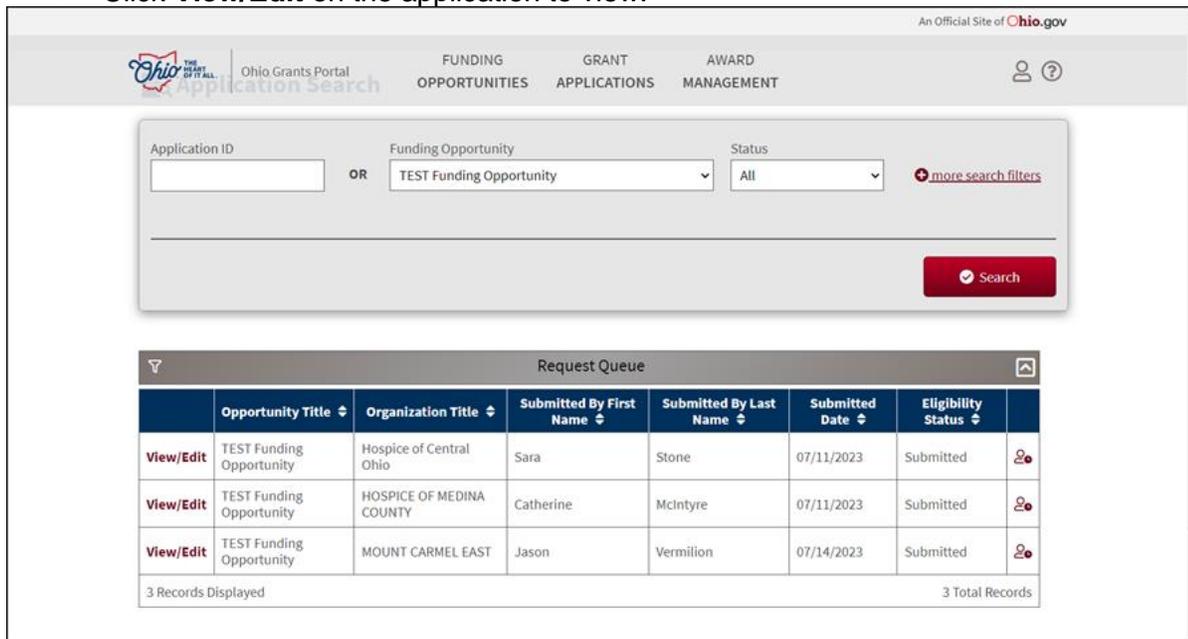
FUNDING OPPORTUNITIES GRANT APPLICATIONS AWARD MANAGEMENT

Application Search

Application ID OR Funding Opportunity Status [+ more search filters](#)

Privacy Notice and Policies [Home](#) [Report a Bug](#)

- 5) Click **Search**.
- The **Request Queue** displays.
 - Click **View/Edit** on the application to view.



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Ohio Grants Portal

FUNDING OPPORTUNITIES GRANT APPLICATIONS AWARD MANAGEMENT

Application Search

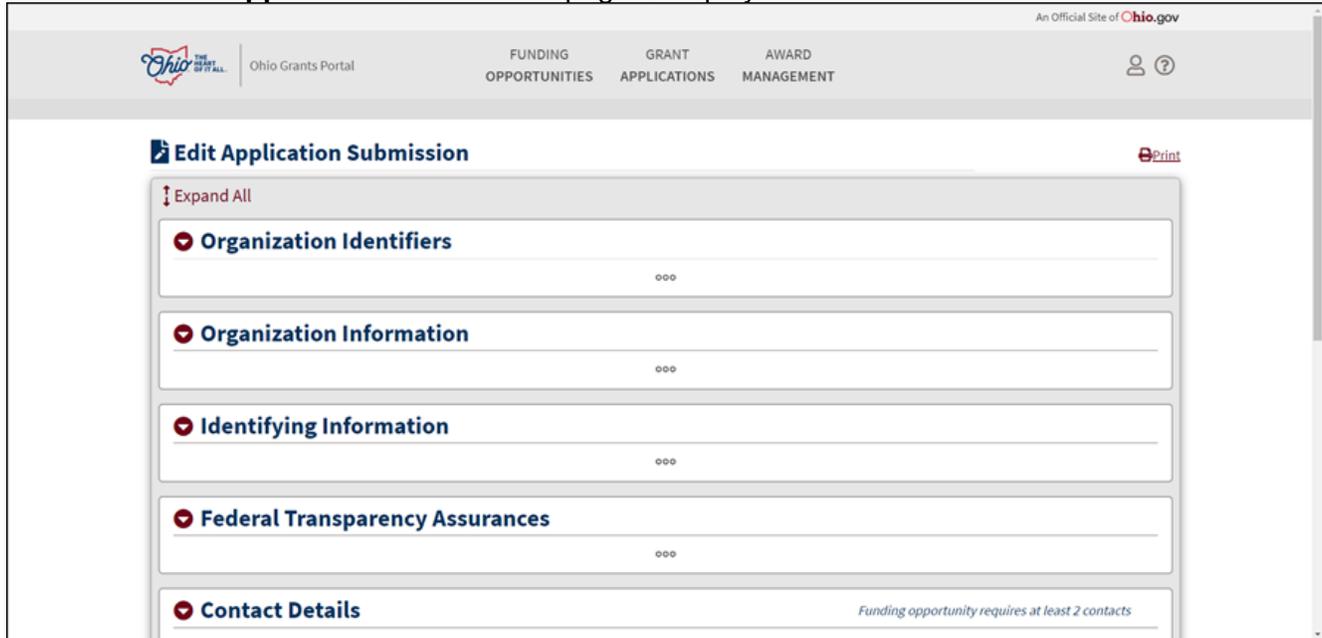
Application ID OR Funding Opportunity Status [+ more search filters](#)

Request Queue						
	Opportunity Title	Organization Title	Submitted By First Name	Submitted By Last Name	Submitted Date	Eligibility Status
View/Edit	TEST Funding Opportunity	Hospice of Central Ohio	Sara	Stone	07/11/2023	Submitted
View/Edit	TEST Funding Opportunity	HOSPICE OF MEDINA COUNTY	Catherine	McIntyre	07/11/2023	Submitted
View/Edit	TEST Funding Opportunity	MOUNT CARMEL EAST	Jason	Vermilion	07/14/2023	Submitted

3 Records Displayed 3 Total Records

REVIEWING APPLICATIONS

- The application opens in a new tab. The Request Queue will remain open in a different tab and will provide real-time updates to any application statuses that may change.
- The **Edit Application Submission** page is displayed on a new tab.



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Ohio Grants Portal

FUNDING OPPORTUNITIES GRANT APPLICATIONS AWARD MANAGEMENT

Edit Application Submission

Expand All

- Organization Identifiers
- Organization Information
- Identifying Information
- Federal Transparency Assurances
- Contact Details

Funding opportunity requires at least 2 contacts

- 6) Review the application information, attachments, and/or additional questions.
- Attachments can be downloaded and can be added to the application.

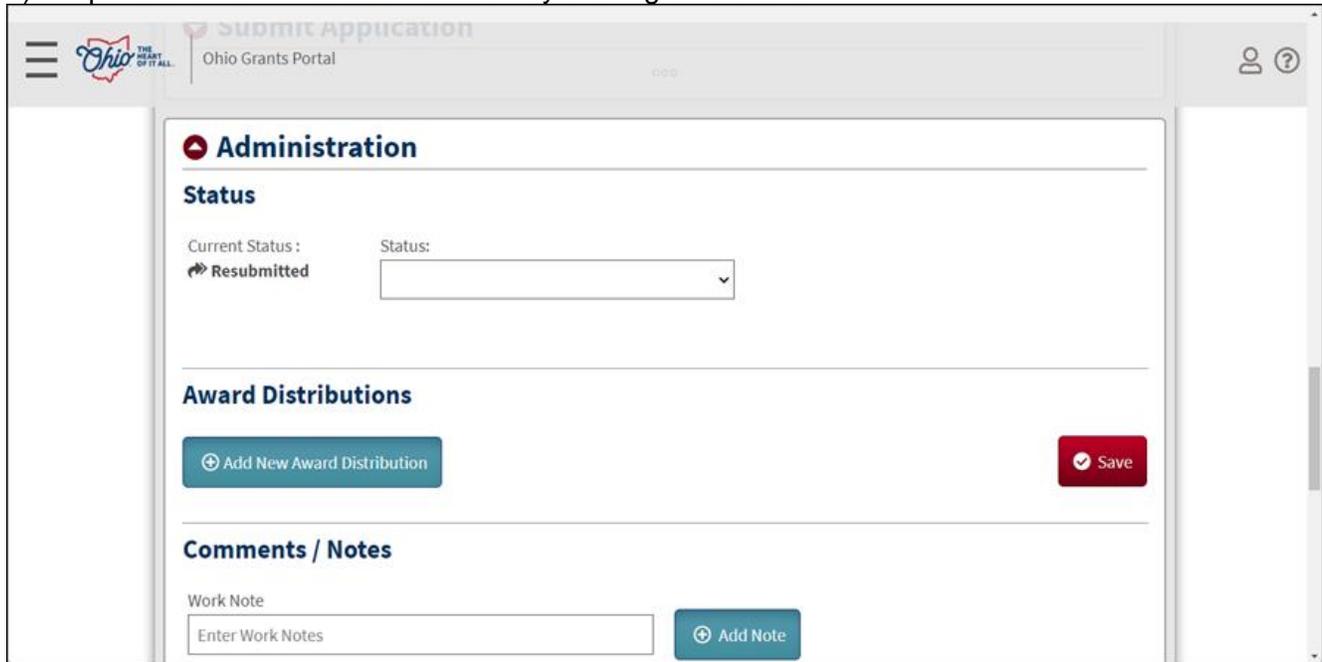
Documents to be Submitted with Application

The following documents are requested with your application.
Only Microsoft Word, PowerPoint, Excel, or PDF formats will be accepted.

Instructions/ Templates	Upload	Uploaded File	Last Saved By	Last Saved Date
<p>* Required</p> <p>Project Budget</p> <p>Please attach a list of planned expenditures for this award.</p>	<p>Add File</p> <p>Maximum File Size Allowed: 30 MB</p>	<p>Copy of Sample GL journal.xlsx</p>	<p>Jason Vermilion</p>	<p>07/14/2023 09:22:13 AM</p>
<p><u>Test Document</u></p> <p>Please attach a test document with your application. A template is provided.</p>	<p>Add File</p> <p>Maximum File Size Allowed: 30 MB</p>		<p>Jason Vermilion</p>	<p>07/12/2023 03:10:25 PM</p>

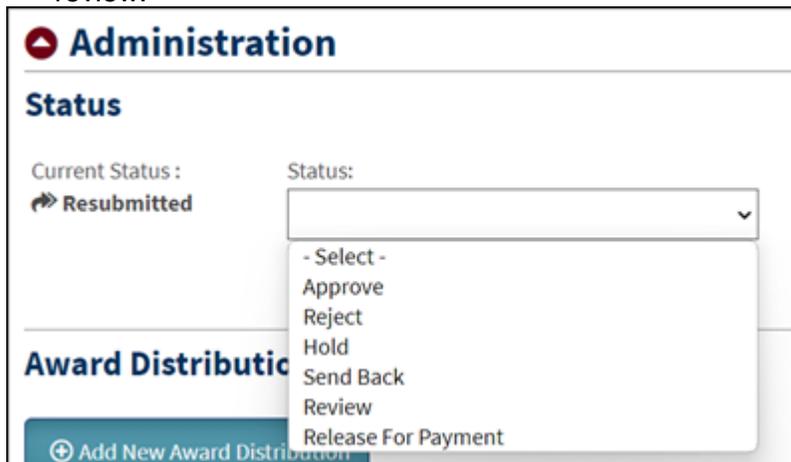
REVIEWING APPLICATIONS

7) Expand the **Administration** section by clicking on the arrow.



The screenshot shows the 'Administration' section of the Ohio Grants Portal. The 'Status' field is currently set to 'Resubmitted'. Below it, there are sections for 'Award Distributions' and 'Comments / Notes'.

8) Change the **Status** of the application as your agency determines how to proceed with application review.



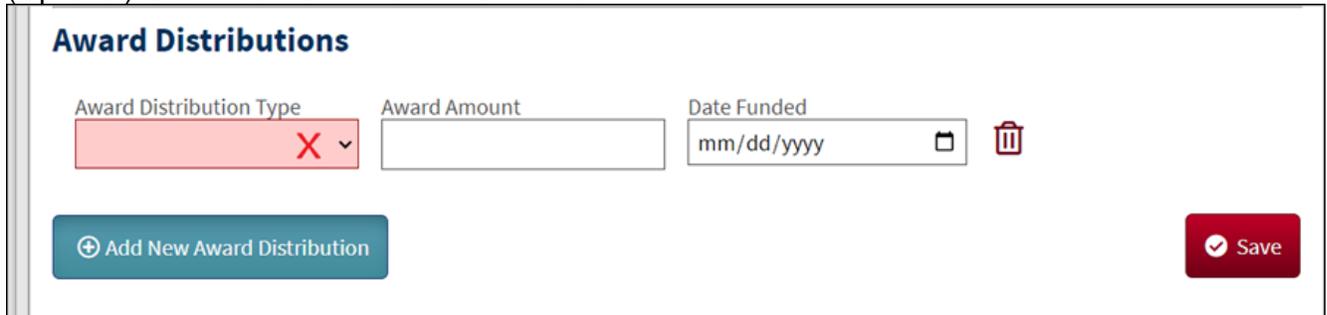
The screenshot shows the 'Administration' section with the 'Status' dropdown menu open. The current status is 'Resubmitted'. The dropdown menu options are: - Select -, Approve, Reject, Hold, Send Back, Review, and Release For Payment.

9) The status selections are:

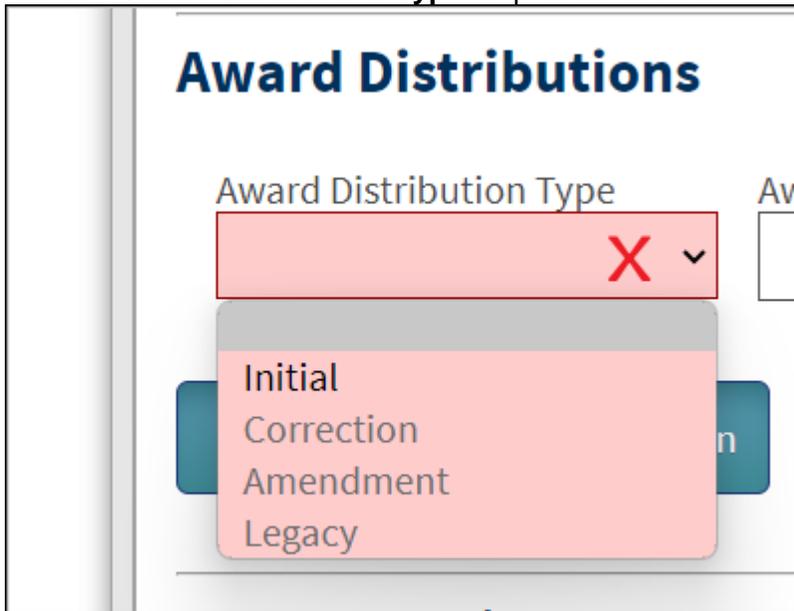
- Approve** – Application is approved for the funding.
- Reject** – Application is denied for funding.
- Sent Back** – Sends the application back to the applicant for changes.
- Hold** - Internal status. No email generated to applicant.
- Review** – Internal status. No email generated to applicant.
- Release For Payment** – Internal status. No email generated to applicant.

REVIEWING APPLICATIONS

10) (Optional) Click **Add New Award Distribution**.

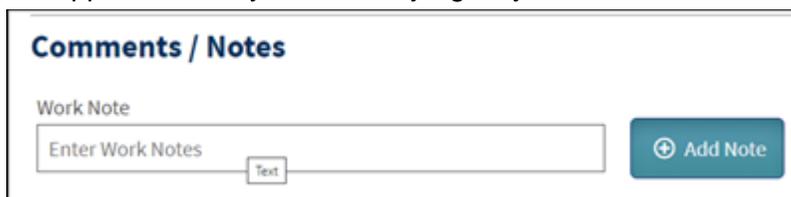


- Adding a New Award Distribution is an optional field.
- a) Click the **Award Distribution Type** drop-down and select “Initial.”



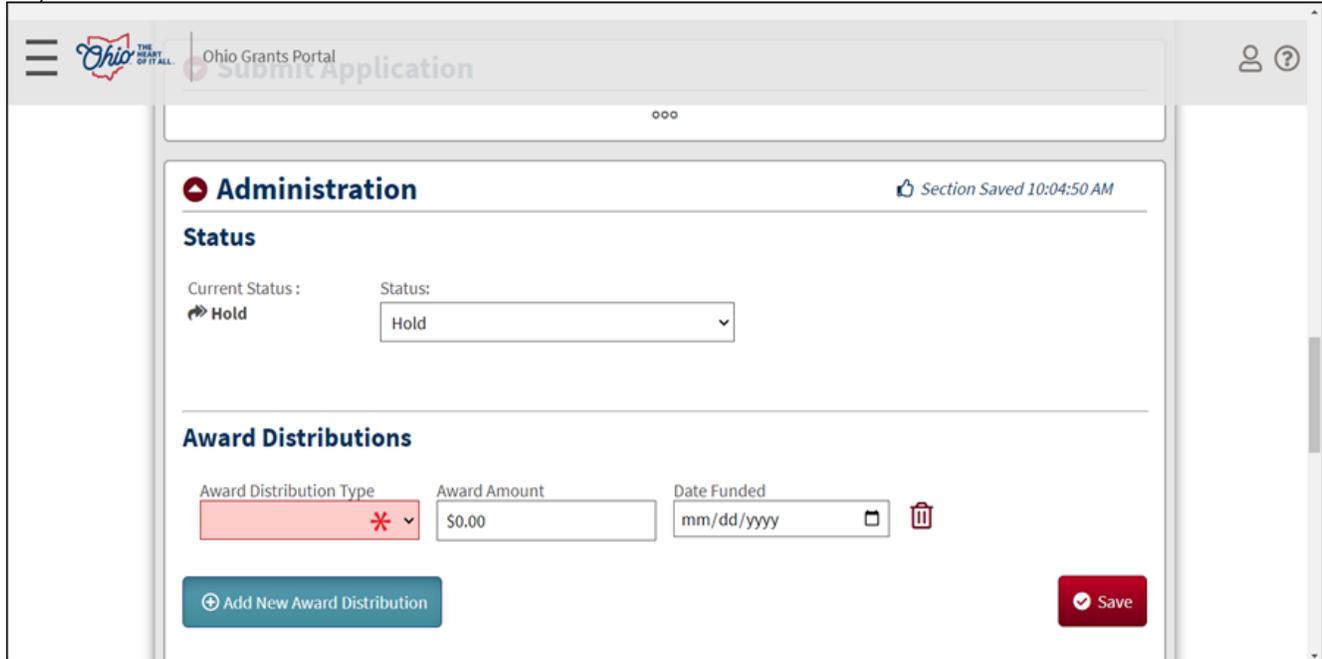
- The types are:
 - **Initial** – Only option for the first distribution.
 - **Correction** – Revise the award amount or date funded.
 - **Amendment** – Adding or subtracting from the initial amount.
- b) Fill in the **Award Amount**.
- c) Fill in the **Date Funded**.
- This is important to complete if the entity applying will have to do activity reporting for a period before their application was approved. Date Funded should go back to the start date of the project period or beginning of desired reporting period.

11) (Optional) Enter a **Work Note**. Work notes are internal comments that are retained with this application, only viewable by agency users.



REVIEWING APPLICATIONS

12) Click **Save**.



Ohio Grants Portal

Submit Application

Administration Section Saved 10:04:50 AM

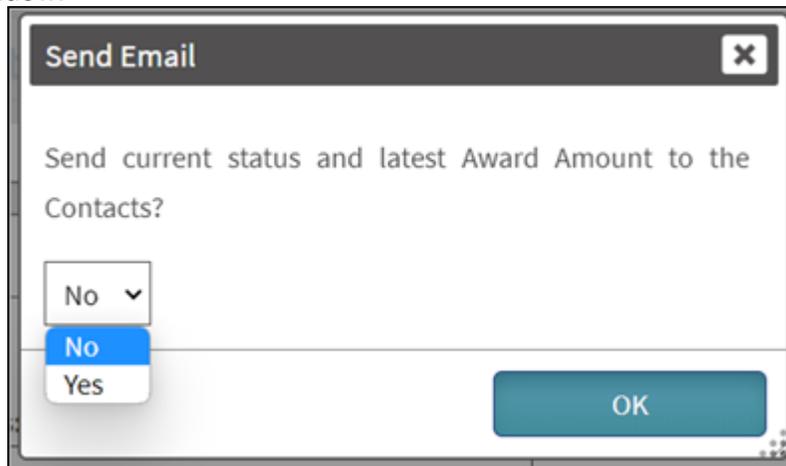
Status

Current Status : **Hold** Status:

Award Distributions

Award Distribution Type	Award Amount	Date Funded
<input type="text" value="*"/>	<input type="text" value="\$0.00"/>	<input type="text" value="mm/dd/yyyy"/>

- Saving with a status of either “Approve,” “Reject,” or “Sent Back” populates a **Send Email** window.

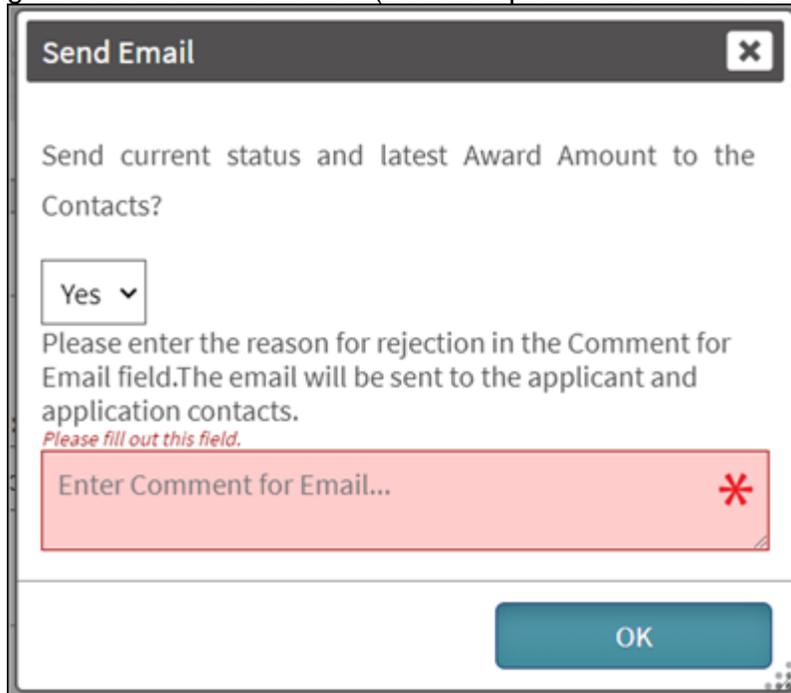


Send Email

Send current status and latest Award Amount to the Contacts?

REVIEWING APPLICATIONS

- For “Approve” and “Reject,” if “Yes” is selected, enter Comments to be included in the system-generated notification email (see examples 3 and 4 at end of document).



Send Email [X]

Send current status and latest Award Amount to the Contacts?

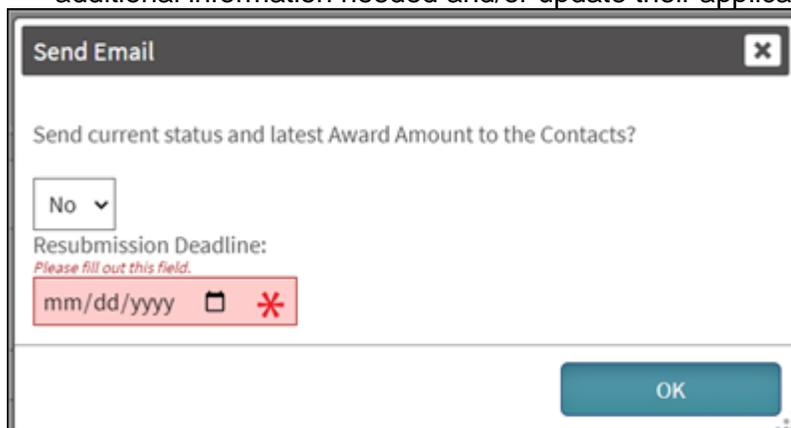
Yes ▾

Please enter the reason for rejection in the Comment for Email field. The email will be sent to the applicant and application contacts.
Please fill out this field.

Enter Comment for Email... *

OK

- If saved with a status of “**Send Back.**”
 - Determine whether to send email to the contacts. Sending an email is recommended to ensure the application is notified.
 - Enter the **Resubmission Deadline.**
 - The resubmission deadline allows an extended period for the applicant to gather the additional information needed and/or update their application.



Send Email [X]

Send current status and latest Award Amount to the Contacts?

No ▾

Resubmission Deadline:
Please fill out this field.

mm/dd/yyyy [calendar icon] *

OK



REVIEWING APPLICATIONS

EMAIL EXAMPLES

The following are examples of the automated emails sent from the Grants Portal.

1) Application Initiated Email.

Subject: Grant Opportunity Application Created for TEST Funding Opportunity.

Thank you for initiating an application for the following opportunity:

TEST Funding Opportunity

Your application has been created. You can access your application from the following URL:

<https://grantsportal2.test.obm.ohio.gov/>

Please do not reply to this e-mail. You may contact Test Business Unit at test@test.test if you have any questions.

Sincerely,
Test Business Unit
Ohio Grants Partnership

Ref: 15814

2) Application Received Email.

Subject: Grant Opportunity Application for TEST Funding Opportunity Received

Thank you for applying for the following opportunity:

TEST Funding Opportunity

We have received your application and will be reviewing it shortly. You will receive a response via email once the review is completed.

Jason, you may access your application to view the current status at the following URL:

<https://grantsportal2.test.obm.ohio.gov/>

Only the applicant, Jason Vermilion, can access the application. You are receiving this email because you either submitted the application or you are listed as a contact on the application. Please do not reply to this e-mail. If you are receiving this e-mail and believe it to be in error, contact Test Business Unit at test@test.test.

Sincerely,
Test Business Unit
Ohio Grants Partnership

Ref: 15814



REVIEWING APPLICATIONS

3) Application Approval Email.

Subject: Grant Opportunity Application for TEST Funding Opportunity is Approved

Thank you for applying for the following opportunity:

TEST Funding Opportunity

Your application is approved.

Award distribution amount: \$5,000.00

Congratulations. Your application has been approved.

You are receiving this email because you either submitted the application or you are listed as a contact on the application.

You may access the Ohio Grants Portal to view the application or report activities related to this award in accordance with any agreed upon terms and conditions and/or guidance provided as part of receiving this funding at <https://grantsportal2.test.obm.ohio.gov/>. The authentication mechanism to access the Ohio Grants Portal now requires using an OH|ID (Ohio's Digital Identity Standard). [Click here](#) if you do not have an OH|ID.

In addition to the applicant, Jason Vermilion, the following contacts will be eligible to login to submit financial reports:

If you received this email and are not listed as a grant contact, then the applicant indicated that you will not submit financial activity reports. You will be courtesy copied on reporting reminders and status updates.

You are receiving this email because you either submitted the application or you are listed as a contact on the application. Please do not reply to this e-mail. If you are receiving this e-mail and believe it to be in error, contact Test Business Unit at test@test.test.

Sincerely,
Test Business Unit
Ohio Grants Partnership

Ref: 15814

4) Application Rejection Email.

Subject: Grant Opportunity Application for TEST Funding Opportunity is Not Accepted

Thank you for registering for the following opportunity:

TEST Funding Opportunity

Submitted by Jason Vermilion

At this time, we are unable to accept your registration for the following reason(s):

We're sorry to inform you that your application has been rejected since you don't match the criteria of a hospital or hospice facility.

Please do not reply to this e-mail. You may contact Test Business Unit at test@test.test if you have any questions.

Sincerely,
Test Business Unit

Ref: 15814



REVIEWING APPLICATIONS

5) Application Sent Back Email.

Subject: Request to update Grant Application 15814 and resubmit by 2023-07-31.

Your Grant Application 15814 for TEST Funding Opportunity is being returned for the following reason:

Please add additional contact..

Please access your application at <https://grantsportal2.test.obm.ohio.gov/> to make the requested updates, and resubmit your application once the updates are complete. Your application must be resubmitted by 2023-07-31.

Only the applicant, , can update the application. You are receiving this email because you either submitted the application or you are listed as a contact on the application. Please do not reply to this e-mail. If you are receiving this e-mail and believe it to be in error, contact at test@test.test.

Sincerely,
Test Business Unit
Ohio Grants Partnership

Ref: 15814