OHIO TRAFFIC SAFETY OFFICE

FFY 2017 Selective Traffic Enforcement Program Grant Pre-Activity Presentation

Who Should View?

The Project Director is **required** to view the Pre-Activity Presentation and complete the Pre-Activity form.

The Fiscal Officer is encouraged to view the presentation.

Contact Information – District 1

County	OSP Patrol Post
Allen	Lima
Defiance	Defiance
Fulton	Toledo
Hancock	Findlay
Hardin	Findlay
Henry	Bowling Green
Lucas	Toledo
Paulding	Van Wert
Putnam	Lima
Van Wert	Van Wert
Williams	Defiance
Wood	Bowling Green

Contact Information:
OTSO Planner - Kelvin Williams: 614/466-3250
LEL - Frank Arvay: 419/213-0084
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 2

County	OSP Patrol Post
Crawford	Bucyrus
Erie	Sandusky
Huron	Norwalk
Marion	Marion
Ottawa	Sandusky
Richland	Mansfield
Sandusky	Fremont
Seneca	Fremont
Wyandot	Bucyrus

Contact Information:
OTSO Planner - Kelvin Williams: 614/466-3250
LEL - Frank Arvay**:** 419/213-0084
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 3

County	OSP Patrol Post
Ashland	Ashland
Cuyahoga	Cleveland
Holmes	Wooster
Lorain	Elyria
Medina	Medina
Stark	Canton
Summit	Canton
Wayne	Wooster

Contact Information:
OTSO Planner - Michelle Liberati-Cobb: 614/466-3250
LEL – Jack Fleming: 440/787-3848
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 4

County	OSP Patrol Post
Ashtabula	Ashtabula
Columbiana	Lisbon
Geauga	Chardon
Lake	Chardon
Mahoning	Canfield
Portage	Ravenna
Trumbull	Warren

Contact Information:
OTSO Planner - Michelle Liberati-Cobb: 614/466-3250
LEL – Jack Fleming: 440/787-3848
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 5

County	OSP Patrol Post
Auglaize	Wapakoneta
Champaign	Springfield
Clark	Springfield
Darke	Dayton
Greene	Xenia
Logan	Marysville
Mercer	Wapakoneta
Miami	Piqua
Montgomery	Dayton
Preble	Dayton
Shelby	Piqua
Union	Marysville

Contact Information:
OTSO Planner - Kelvin Williams: 614/466-3250
LEL – SW LEL
OSP Patrol Post:
http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 6

County	OSP Patrol Post
Delaware	Delaware
Fairfield	Lancaster
Franklin	Columbus
Knox	Mt. Gilead
Licking	Granville
Madison	West Jefferson
Morrow	Mt. Gilead
Perry	Lancaster
Pickaway	Circleville

Contact Information:
OTSO Planner - Jackie Stephenson: 614/466-3250
LEL - Mike Brining: 614/946-2878
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 7

County	OSP Patrol Post
Belmont	St. Clairsville
Carroll	New Philadelphia
Coshocton	Zanesville
Guernsey	Cambridge
Harrison	Steubenville
Jefferson	Steubenville
Monroe	St. Clairsville
Morgan	Marietta
Muskingum	Zanesville
Noble	Cambridge
Tuscarawas	New Philadelphia
Washington	Marietta

Contact Information:
OTSO Planner - Michelle Liberati-Cobb: 614/466-3250
LEL – Mike Brining: 614/946-2878
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 8

County	OSP Patrol Post
Adams	Georgetown
Brown	Georgetown
Butler	Hamilton
Clermont	Batavia
Clinton	Wilmington
Fayette	Wilmington
Hamilton	Cincinnati
Highland	Wilmington
Warren	Lebanon

Contact Information:
OTSO Planner - Jackie Stephenson: 614/466-3250
LEL – SW LEL
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information – District 9

County	OSP Patrol Post
Athens	Athens
Gallia	Gallipolis
Hocking	Athens
Jackson	Jackson
Lawrence	Ironton
Meigs	Gallipolis
Pike	Chillicothe
Ross	Chillicothe
Scioto	Portsmouth
Vinton	Jackson

Contact Information:
OTSO Planner - Jackie Stephenson: 614/466-3250
LEL - Mike Brining: 614/946-2878
OSP Patrol Post: http://statepatrol.ohio.gov/Counties.stm

Contact Information

- Contact information may change throughout the year, OTSO will keep sub-recipients as up to date as possible.
- These Contact Information slides will be updated as needed. Please refer back to these slides.

FFY 2017 Pre-Activity Form

- Print the FFY 2017 Pre-Activity Form from http://ohiohighwaysafetyoffice.ohio.gov

  Use this form to follow along with this presentation.
- **Agency** - enter your agency name.
- **Date** – enter the date you are viewing this presentation.
- **County** – enter the county where you are located.
- Check the box to the left of STEP.
- **Reimbursement Claim schedule** – check monthly or quarterly. **New sub-recipients must check monthly.**

Activity Dates

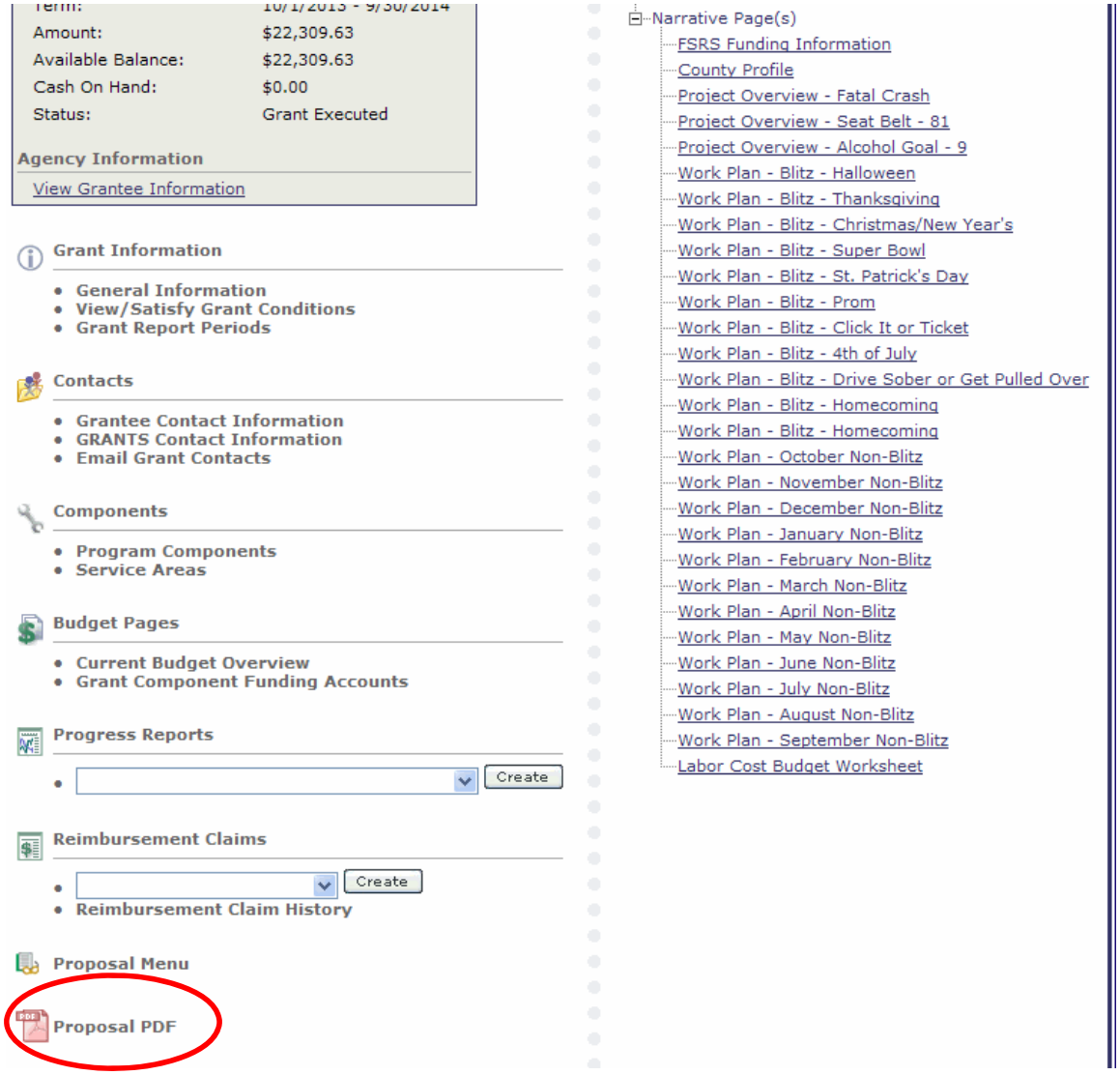
- Beginning Date – Grant period will commence after this required pre-activity presentation has been completed and the authorized to proceed date listed in the Award Letter.

- Ending Date – All grant activity must be completed by September 30, 2017.

Check the box next to beginning and ending dates on the Pre-Activity form.

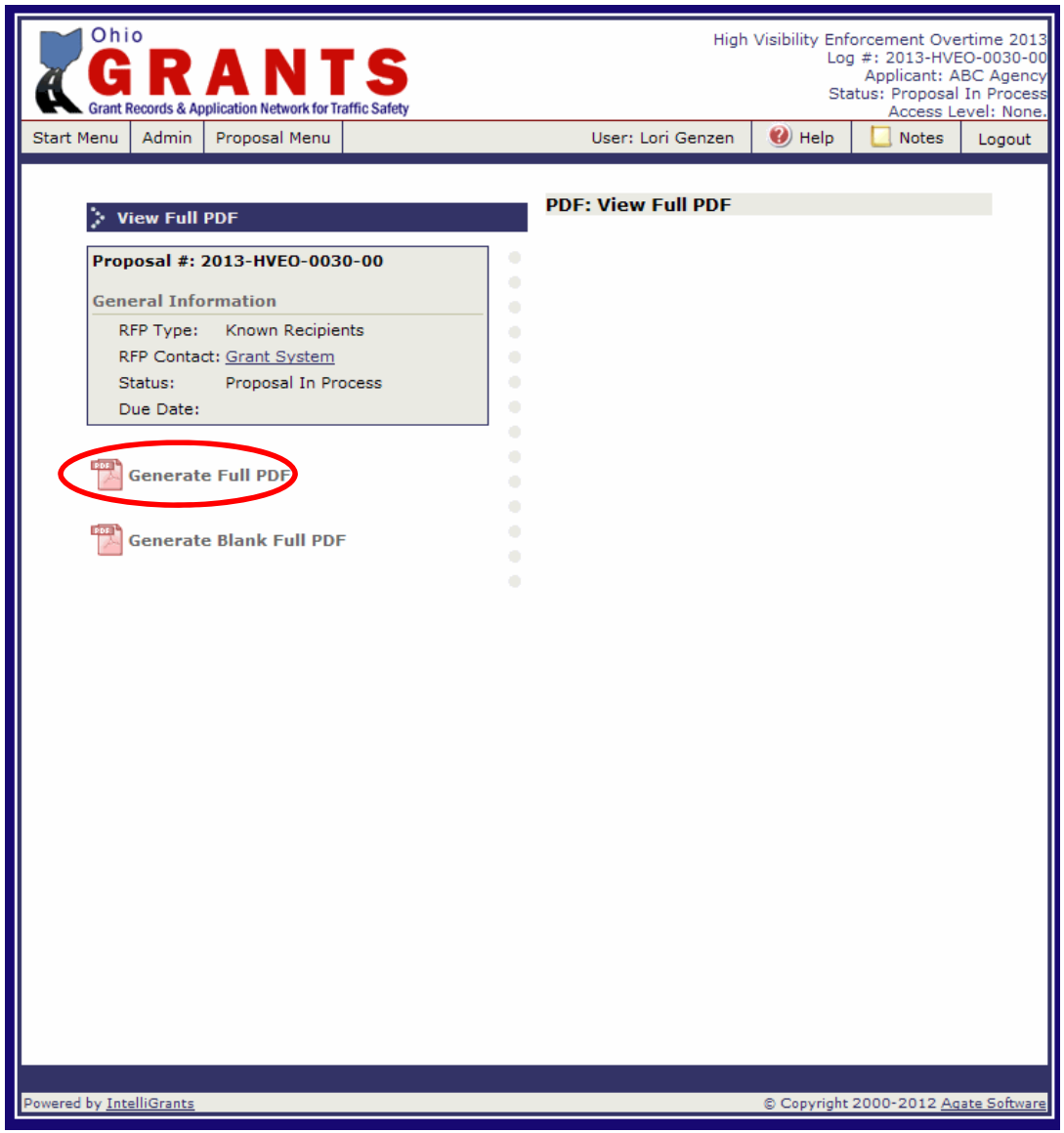
PDF

- All sub-recipients need to generate a Full PDF of their grant outlining the goals, baselines, scopes of work, evaluations, work plans and the budget.
- Click on Proposal PDF



PDF

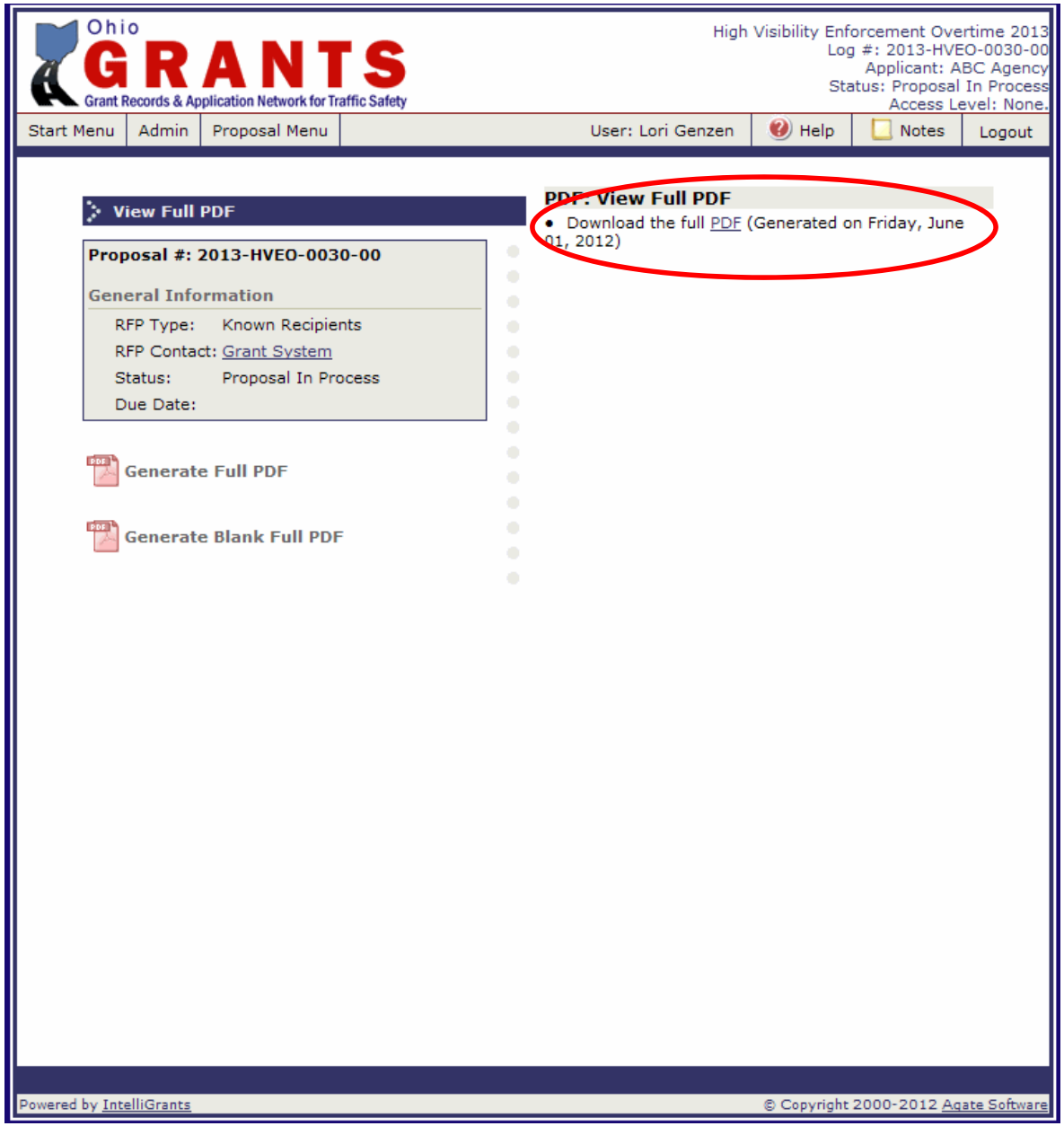
- Click on Generate Full PDF.
- This is an overnight process. The following morning you will receive an email stating that the PDF is ready. It will not be attached to the email.



PDF

- Return to this screen and click on the PDF on the right side.

Check the box next to Generate full PDF on the Pre-Activity Form.



Mandatory National Mobilizations

- Click It or Ticket: May 22 – June 4, 2017
- Drive Sober or Get Pulled Over: August 18 – September 3, 2017

  - STEP grantees are required to participate and report in both National Mobilizations.

Check the box next to Mandatory National Mobilizations on the Pre-Activity Form.

Allowable Costs

- Labor Expenses (Salaries and Wages)
  - The sub-recipient needs to maintain a coordinator (project director) throughout the grant.
- Education Efforts
- Fuel/Transportation Costs (up to 5% of direct labor enforcement costs – not education costs)

Refer to page 30 of the Grant Solicitation Package for details on each cost category.

Unallowable Costs

- Vehicle Mileage
- Food
- Paid Advertising/Public Communications
- Equipment
- Certain Labor Costs
- Alcoholic Beverages
- Lobbying
- Grant Proposal Preparation and Submission

See page 31 of the Grant Solicitation Package for details on each cost category.

Check the box next to Allowable and unallowable costs on the Pre-Activity Form.

Request to Purchase Form

- Even if the item is approved in the grant, all purchases must be submitted to and approved by OTSO on a Request to Purchase form prior to incurring the cost.
- **Request to Purchase Forms should be submitted at least 45 days prior to the event.**
- **All RTPs must be submitted to OTSO by August 1, 2017.**
- A Request to Purchase form is required for:
  - Education Efforts

Any questions about whether or not a form is required, contact OTSO.

Check the box next to Request to Purchase form on the Pre-Activity Form.

Grant Revisions

- Any changes, additions, or deletions to this agreement must be submitted online and approved by OTSO prior to implementing proposed changes.
- A reimbursement claim cannot be submitted while a revision is in process. You must wait until the revision is finalized (approved or rejected). If you have a claim in process and you submit a revision – the revision will be rejected.
- All revisions must be submitted online to OTSO by September 1, 2017.

Check the box next to Grant Revisions on the Pre-Activity Form.

Terms and Conditions

A complete list is on pages 12 – 26 of the FFY 2017 Grant Solicitation Package.

1) Agreement

Any inconsistencies between agreements and any attached documents shall be resolved in favor of the most current revised agreement on the online system, which shall be the controlling document.

18) Press Release

Each sub-recipient is required to submit a press release to their local media announcing the grant award, including amount and purpose of award.

Terms and Conditions

21) GRANTS User Accounts/Password Security

For security purposes, each person using the GRANTS system must have a separate user name and password. Each account must have its own email account. **sub-recipient agency personnel must not share passwords with agency staff or OTSO staff.**

22) Labor Costs

All work (personnel labor costs) reimbursed under this grant must be for actual **paid** hours worked. Labor costs based on a percentage of hours worked will not be accepted for reimbursement. Leave hours (e.g., sick, vacation, personal, holiday, etc.) are not reimbursable as direct labor. The employer's share of fringe benefits (e.g., retirement, Workers' Compensation, Medicare, etc.) are eligible for reimbursement. Documentation verifying fringe percentages must be available to OTSO upon request.

Terms and Conditions

31) Training

The cost of training personnel for traffic safety purposes may be funded when the training supports both the goals and scope of work of the approved grant program and the goals of OTSO. All training requests and purchases must be submitted to and approved by OTSO on a Request to Purchase form prior to incurring the cost.

34) Reimbursement Claims

This agreement will operate on a reimbursement basis only. The administering agency must first incur the costs for approved expenditures and then apply for the reimbursement. Appropriate and accurate documentation will be required for each expense. Claim schedules are set up either monthly or quarterly based on sub-recipients selection on the pre-activity form. Any changes from this schedule must be made by the sub-recipient in writing. Each sub-recipient must submit reimbursement claims by the due date assigned to the claim in the GRANTS System.

Terms and Conditions

36) Narrative Progress Reports

The timetable for submission of narrative progress reports will be determined by OTSO. Each sub-recipient must submit progress reports by the due date assigned to the report in the GRANTS system.

38) Sub-Recipient on Notice

Sub-Recipient that fail to meet performance standards and/or grant requirements may be placed in “Sub-Recipient on Notice” status. This designation will last until an agency satisfies agreed upon requirements.

Criteria for being placed in “Sub-Recipient on Notice” status:

a) A pattern of untimely submissions of required activity reports (including required supporting documentation).
b) A pattern of untimely submission of required reimbursement claims (including required supporting documentation).
c) Sub-recipient fails to perform activities according to the approved plan.
d) A pattern of utilizing funds for unapproved activities, or has attempted to as identified in the review of reimbursement claims and submission of supporting documentation.

For more information about **Sub-Recipient on Notice, contact OTSO.**

Terms and Conditions

39) Final Report and Final Claim

A final comprehensive annual project activity report must be submitted to OTSO by November 1.

a) Final reports not received by November 1 will result in a 10 percent penalty deduction to the final claim reimbursement.

b) If a final project activity report is received after November 15, the final claim will not be reimbursed.

A properly documented final claim for reimbursement must be submitted to OTSO by November 1.

a) Final claims not received by November 1 will result in a 10 percent penalty deduction in the final claim reimbursement.

b) Final claims received after November 15 will not be reimbursed.

Terms and Conditions

40) Records Retention

All records relating to project activity and/or expenditures must be maintained for review by representatives of the federal or state government for at least three years following the final reimbursement payment.

42) Termination of Agreement

Either OTSO or the sub-recipient may terminate this Agreement for any reason by giving the other party 30 days written notice. If the Agreement is cancelled under this provision, OTSO shall reimburse the sub-recipient for approved work completed and documented to that date. Upon termination all data results, reports and other materials developed by the sub-recipient will become the property of OTSO. All of the equipment, materials and/or supplies provided to the sub-recipient for use under this agreement must be returned to OTSO upon request within 30 days of said written notice. Should any change in federal funding adversely affect OTSO's ability to complete the fiscal year's activities, OTSO has the right to revise or terminate the agreement in writing.

Terms and Conditions

44) Enforcing Seat Belt Laws

The agency will enforce all seat belt and child restraint laws on all traffic stops made under this grant.

47) Mandatory Blitzes

Funding for all OTSO identified blitzes must be used for saturation patrols and OVI checkpoints only. Directing traffic, conducting parking detail at events, crash investigations, any non-traffic safety related activities, or any activities not identified in scope of work or work plan are not reimbursable activities.

48) National Enforcement Campaigns

All agencies utilizing overtime enforcement funds from OTSO are required to participate in the “Click It or Ticket” (CIOT) mobilization and the “Drive Sober or Get Pulled Over” (DSOGPO) alcohol crackdown.

Terms and Conditions

49) Press Releases

In addition to the grant award press release, OVI Task Forces are required to conduct three press conference events (one in coordination with DSOGPO), promote the task force through press releases and publicize checkpoints as required by law.

51) Monthly Enforcement Reports

Whether or not a sub-recipient conducts grant-related activity, each sub-recipient must submit an enforcement report monthly. The monthly enforcement report must be submitted online to OTSO by the 15th calendar day of the following month. Failure to submit these reports in a timely manner will cause a delay in payment of claims, may jeopardize funding for present and future projects and may result in being placed in “sub-recipient on Notice” status.

Check the box next to Terms and Conditions on the Pre-Activity form.

SELECTIVE TRAFFIC ENFORCEMENT PROGRAM GRANT

GRANTS System

Report, Reimbursement Claim and Revision Process

NOTE: Must use Internet Explorer

Monthly Enforcement Report

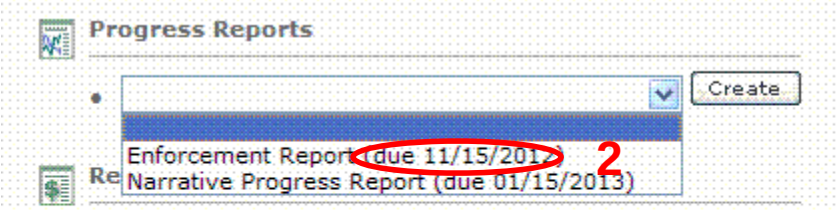
- A monthly enforcement report is due for each month. Even if there is no grant activity, a report must be submitted.
- Each monthly enforcement report is broken down into two forms:
  - Enforcement Report
  - Sobriety Checkpoint Activity
- Each monthly enforcement report is due the 15th of the following month (example: October enforcement report is due November 15th).

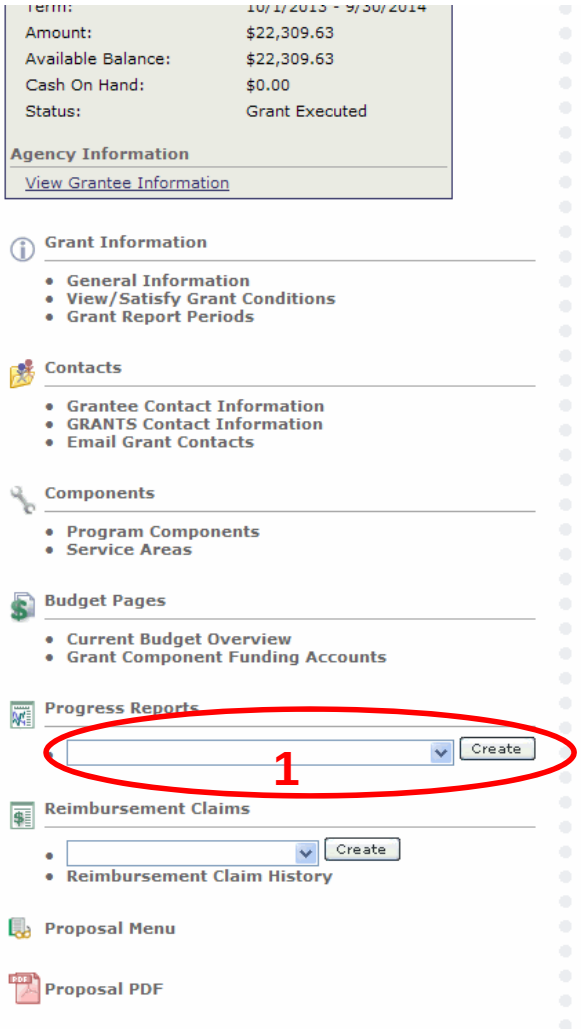
Progress Reports

1. Progress reports will be listed in the drop down under Progress Reports.

   Reports will be in the drop down the first day of the reporting period. (Ex. May Enforcement Report will be in the drop down May 1st).

2. The date listed after the report name is the date the report is due. If a report is past due, you will not be able to submit a claim (or re-submit a claim that was sent back for modifications).



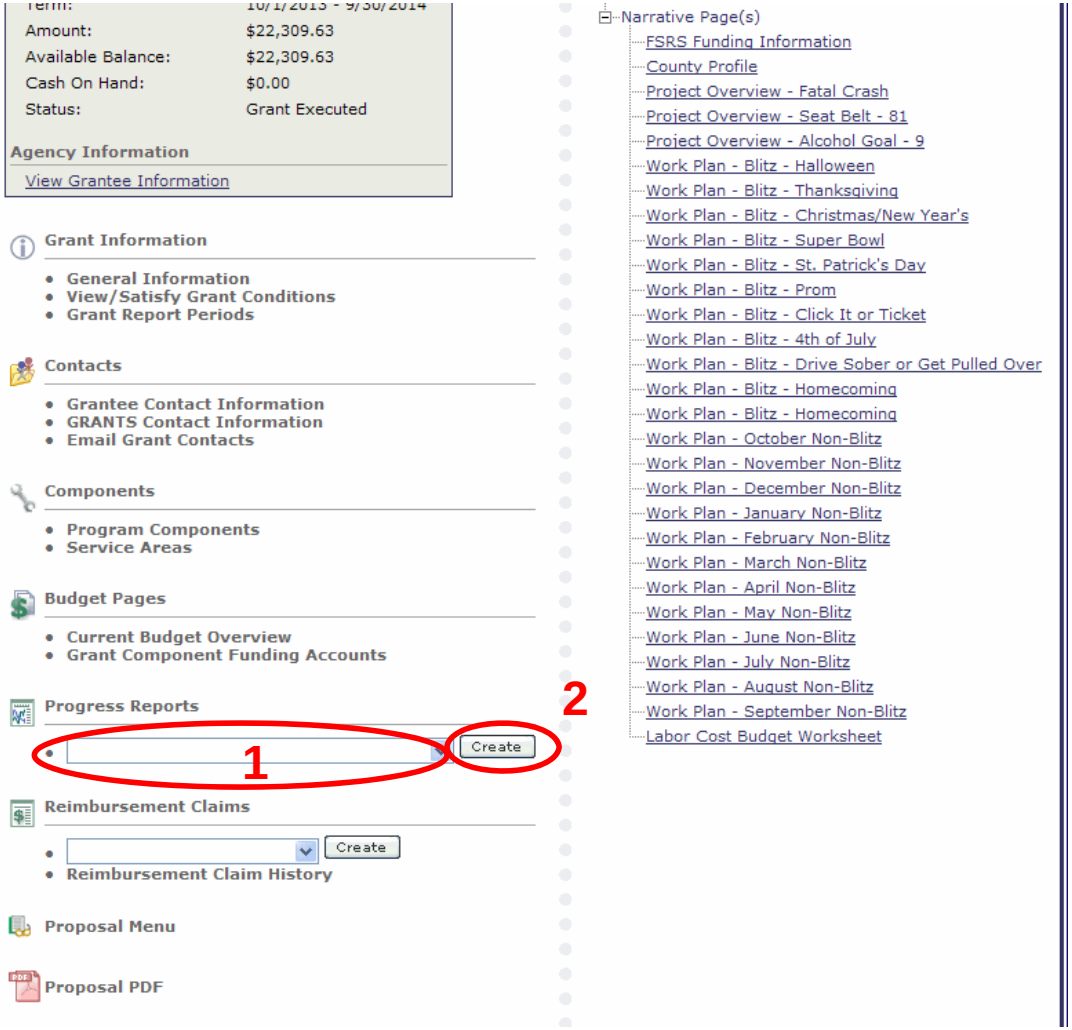


Monthly Enforcement Reports

To initiate the report:

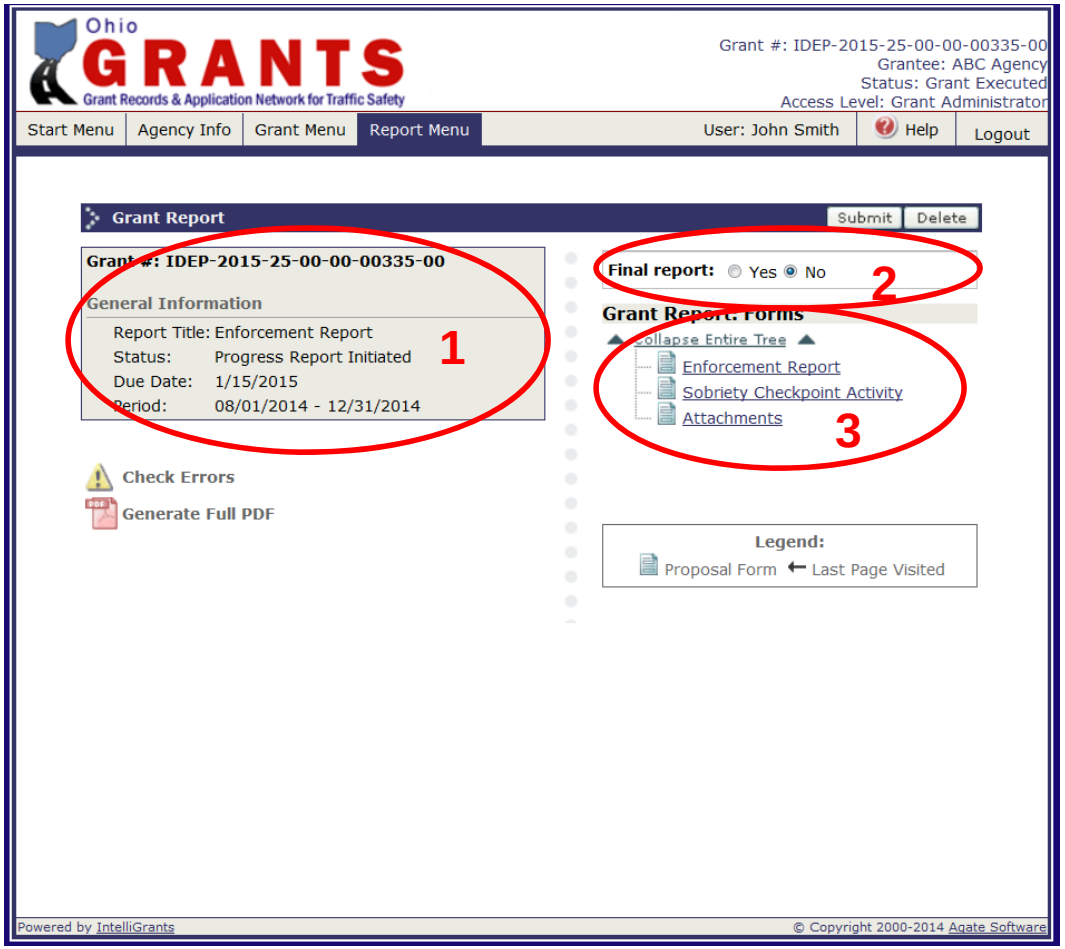
1. Select the report from the drop down menu.

2. Click the “Create” button.



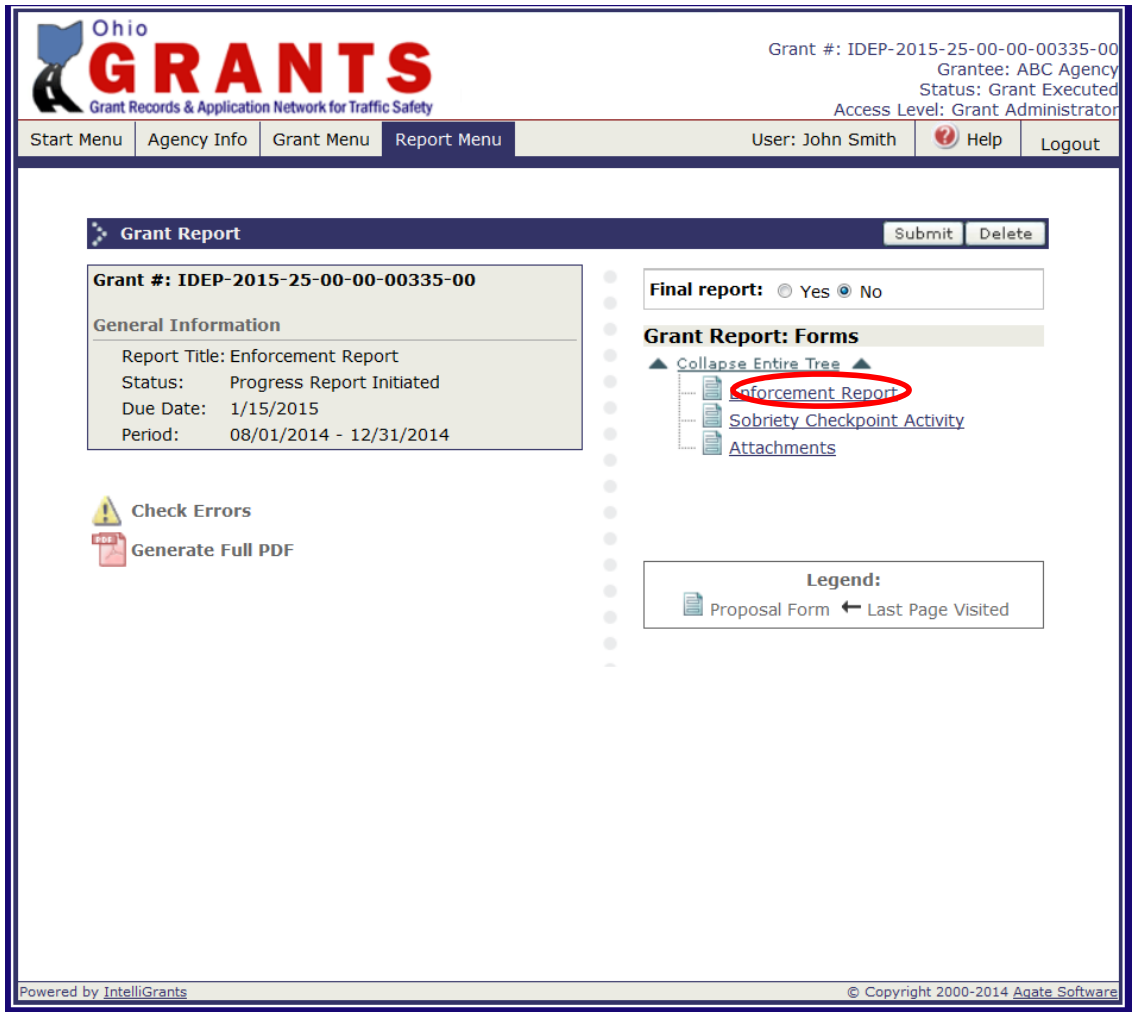
Enforcement Report Menu

1. General Information Box lists the report title, the current status of the report, the due date of the report and the period that this report covers.
2. Final Report: Default is “no”. This is correct until the last enforcement report for the year (September). If you tell the system “yes”, the system will not generate additional enforcement reports.
3. Grant Report Forms: List of all forms in the Enforcement Report.



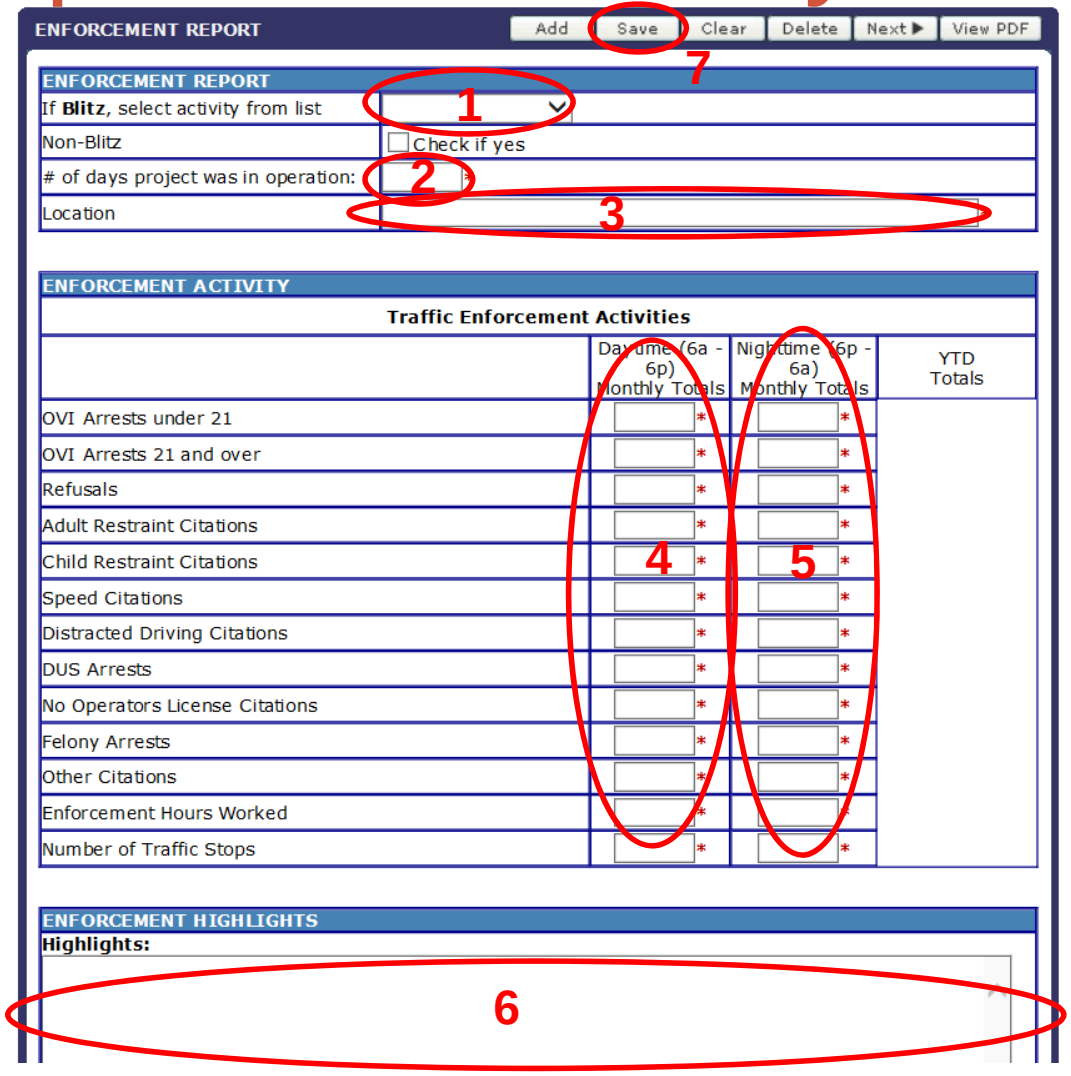
Enforcement Report

Click on Enforcement Report to begin filling out the forms.



Enforcement Report – Blitz Activity

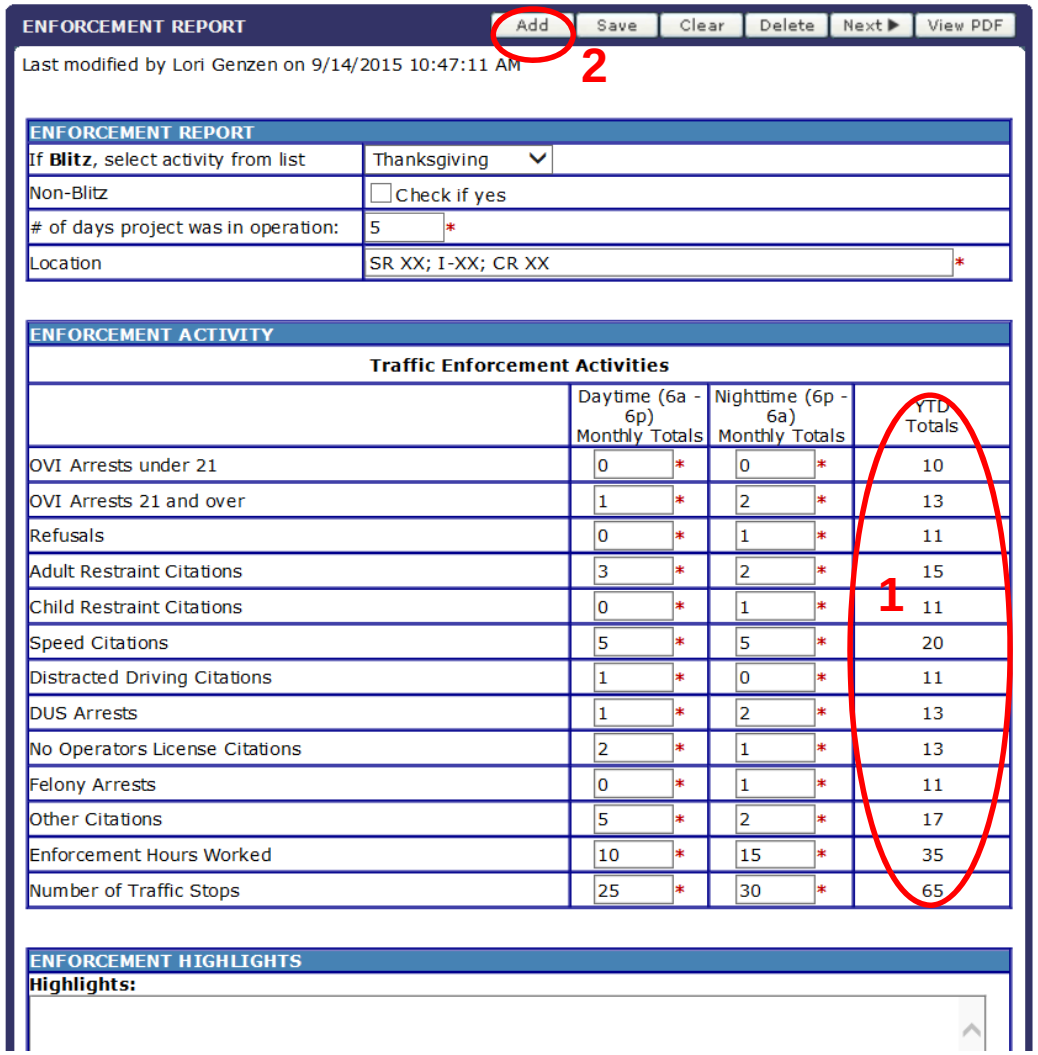
1. To report Blitz Activity, select the correct blitz from the dropdown (do not check the non-blitz box).
2. Enter the number of days the project was in operation. (Ex. If the project only ran from October 15 – 20, then enter 6)
3. Enter the locations where activity was conducted.
4. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant between **6am and 6pm.**
5. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant between **6pm and 6am.**
6. Highlight – List any activity highlights that occurred during the month.
7. Click "Save".



If you do not have any activity for the month to enter on this form, do not click in any field. Click "Next". Once you click in any field, however you must complete each box with a *.

Enforcement Report – Blitz Activity Cont.

1. After clicking “Save” the YTD totals will self-populate.
2. To report another Blitz Activity, click “Add” to get a blank report then repeat steps 1 – 7 on the previous slide. To report non-blitz, click “Add” to get a blank report and follow the steps on the next slide.



ENFORCEMENT REPORT

Add | Save | Clear | Delete | Next ▶ | View PDF

2

Last modified by Lori Genzen on 9/14/2015 10:47:11 AM

ENFORCEMENT REPORT	
If **Blitz**, select activity from list	Thanksgiving
Non-Blitz	☐ Check if yes
# of days project was in operation:	5 *
Location	SR XX; I-XX; CR XX *

ENFORCEMENT ACTIVITY

Traffic Enforcement Activities

	Daytime (6a - 6p) Monthly Totals	Nighttime (6p - 6a) Monthly Totals	YTD Totals
OVI Arrests under 21	0 *	0 *	10
OVI Arrests 21 and over	1 *	2 *	13
Refusals	0 *	1 *	11
Adult Restraint Citations	3 *	2 *	15
Child Restraint Citations	0 *	1 *	11
Speed Citations	5 *	5 *	20
Distracted Driving Citations	1 *	0 *	11
DUS Arrests	1 *	2 *	13
No Operators License Citations	2 *	1 *	13
Felony Arrests	0 *	1 *	11
Other Citations	5 *	2 *	17
Enforcement Hours Worked	10 *	15 *	35
Number of Traffic Stops	25 *	30 *	65

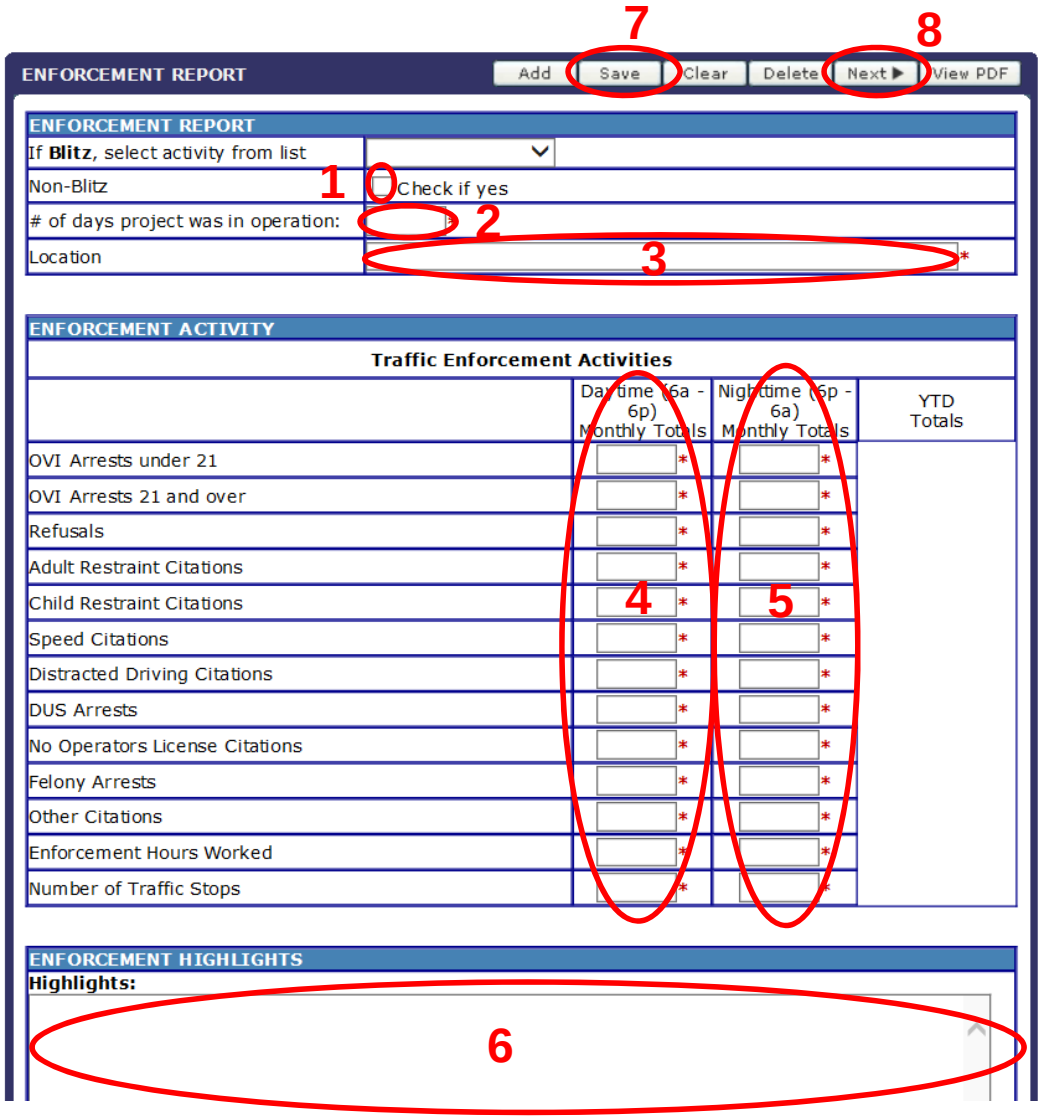
1

ENFORCEMENT HIGHLIGHTS

Highlights:

Enforcement Report – Non-Blitz Activity

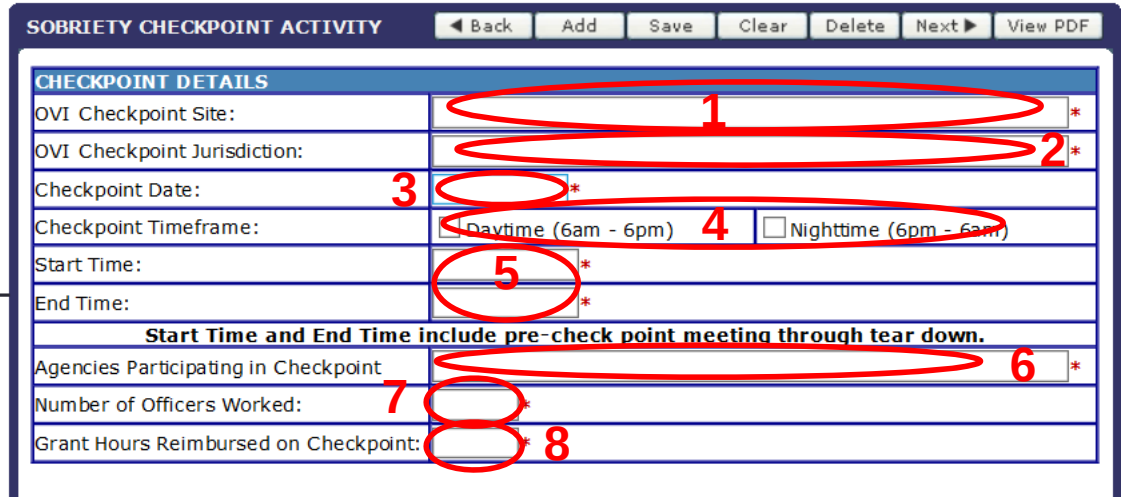
1. To report Non-Blitz Activity, check the Non-Blitz box (do not select a blitz).
2. Enter the number of days the project was in operation. (Ex. If the project only ran from October 15 – 20, then enter 6)
3. Enter the locations where activity was conducted.
4. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant between **6am and 6pm.**
5. This column is for activity that was conducted on saturation patrols, corridor enforcement, etc. on this grant between **6pm and 6am.**
6. Highlight – List any activity highlights that occurred during the month.
7. Click "Save".
8. Once all Blitz and non-blitz activity have been entered, click "Next".



If you do not have any activity for the month to enter on this form, do not click in any field. Click "Next". Once you click in any field, however you must complete each box with a *.

Sobriety Checkpoint

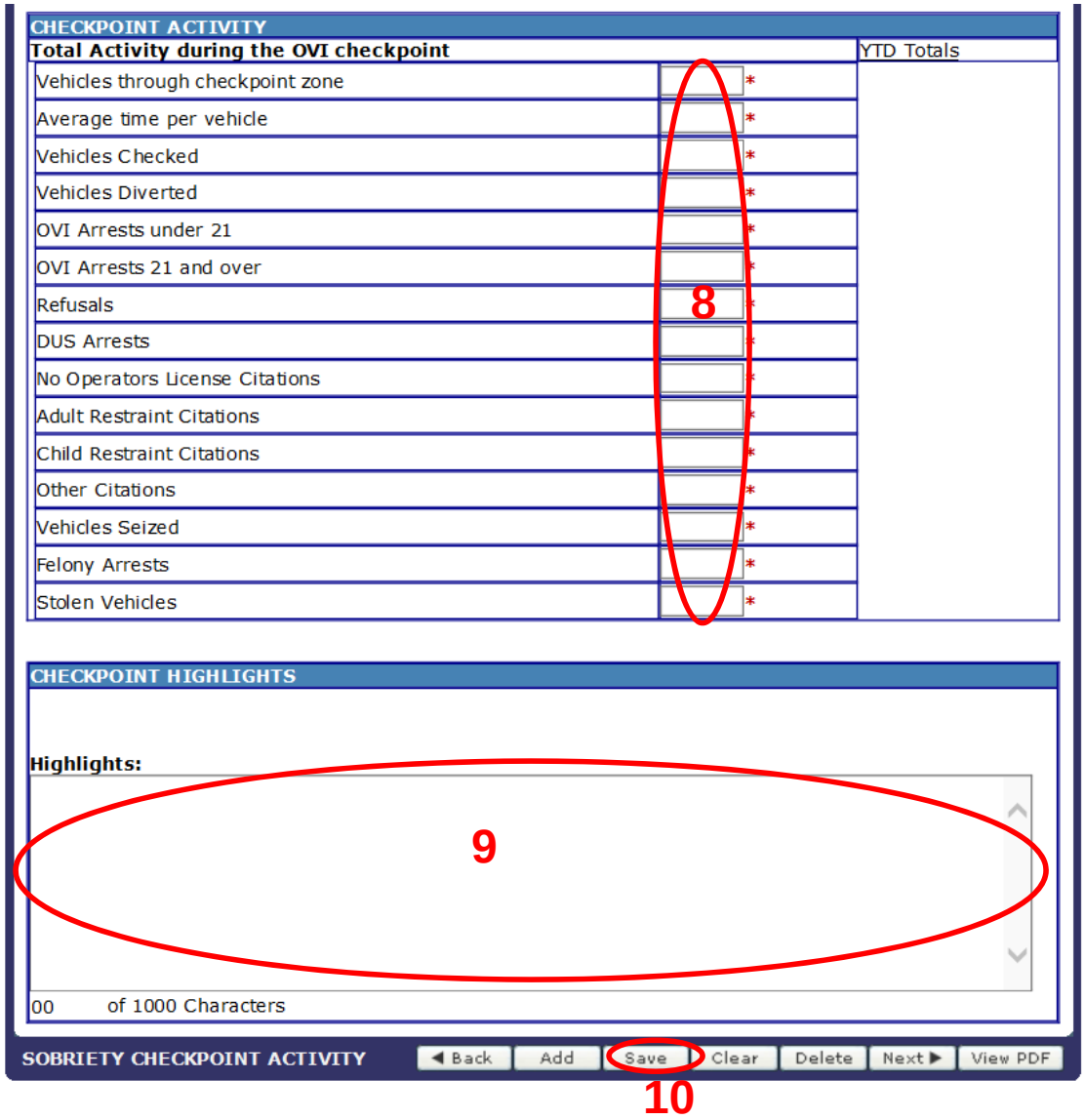
1. Enter the site.
2. Enter the jurisdiction the checkpoint is in.
3. Enter the date the checkpoint started.
4. Select Checkpoint Timeframe – Daytime (6am – 6pm) or Nighttime (6pm – 6am).
5. Enter the Start and End time (include pre-check point meeting through tear down).
6. Enter the agencies participating in the checkpoint.
7. Enter the number of officers that worked the checkpoint.
8. Enter the number of hours that are being reimbursed on the grant.



Sobriety Checkpoint Cont.

8. This column is for activity that was done **at a checkpoint** on this grant.
9. Highlight – List any activity highlights that occurred at the checkpoint.
10. Click “Save”.

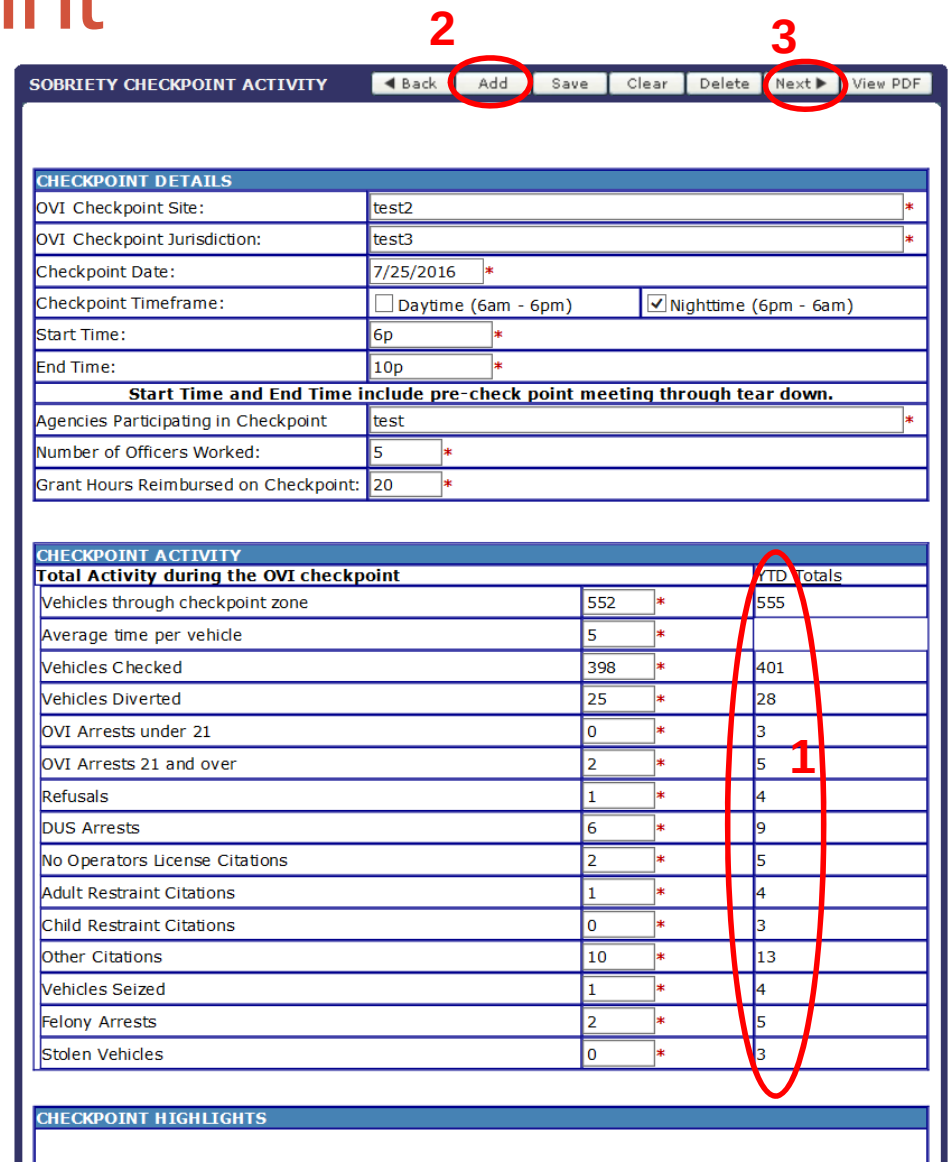
If you did not have a checkpoint, do not click in any field. Click “Next”. Once you click in any field, however you must complete each box with a *.



Sobriety Checkpoint

1. After hitting save, allow the page to process, once it has processed the YTD figures will self-populate.
2. If you need to enter another form, hit “Add” and repeat steps 1 -10 on the previous two slides.
3. If you are done entering sobriety checkpoint activity, click “Next”.

Note: If a checkpoint is set up in one location, tore down, moved and set up in another location that counts as two different checkpoints. You need to complete two checkpoint forms.



Enforcement Report Attachments

Use this form to attach documents to your enforcement report (press releases, news articles, etc.). Do not attach claim related documentation to your report.

1. Give a brief description of the document.
2. Click “Browse” to search your computer for the file.
3. Click “Save”.
4. Click “Add” and repeat steps 1 – 3 to add additional attachments.
5. When done adding attachments, click “Report Menu”.

NOTE: When attaching PDFs, make sure the file name does NOT include any special characters (&, #, %, etc.)

Enforcement Report Menu

1. When you are certain all data has been entered accurately and completely, click “Check Errors” to see if there are any system errors to fix prior to submitting.
2. If you would like a PDF of the report to print or save to your computer, click “Generate Full PDF”.
3. If there are no errors, click the “Submit” button.

Report Submitted

Once your report is successfully submitted, you will see a confirmation at the top of the screen and the status will change in the General Information box.

Click “Grant Menu” to return to the Grant.

Narrative Progress Report

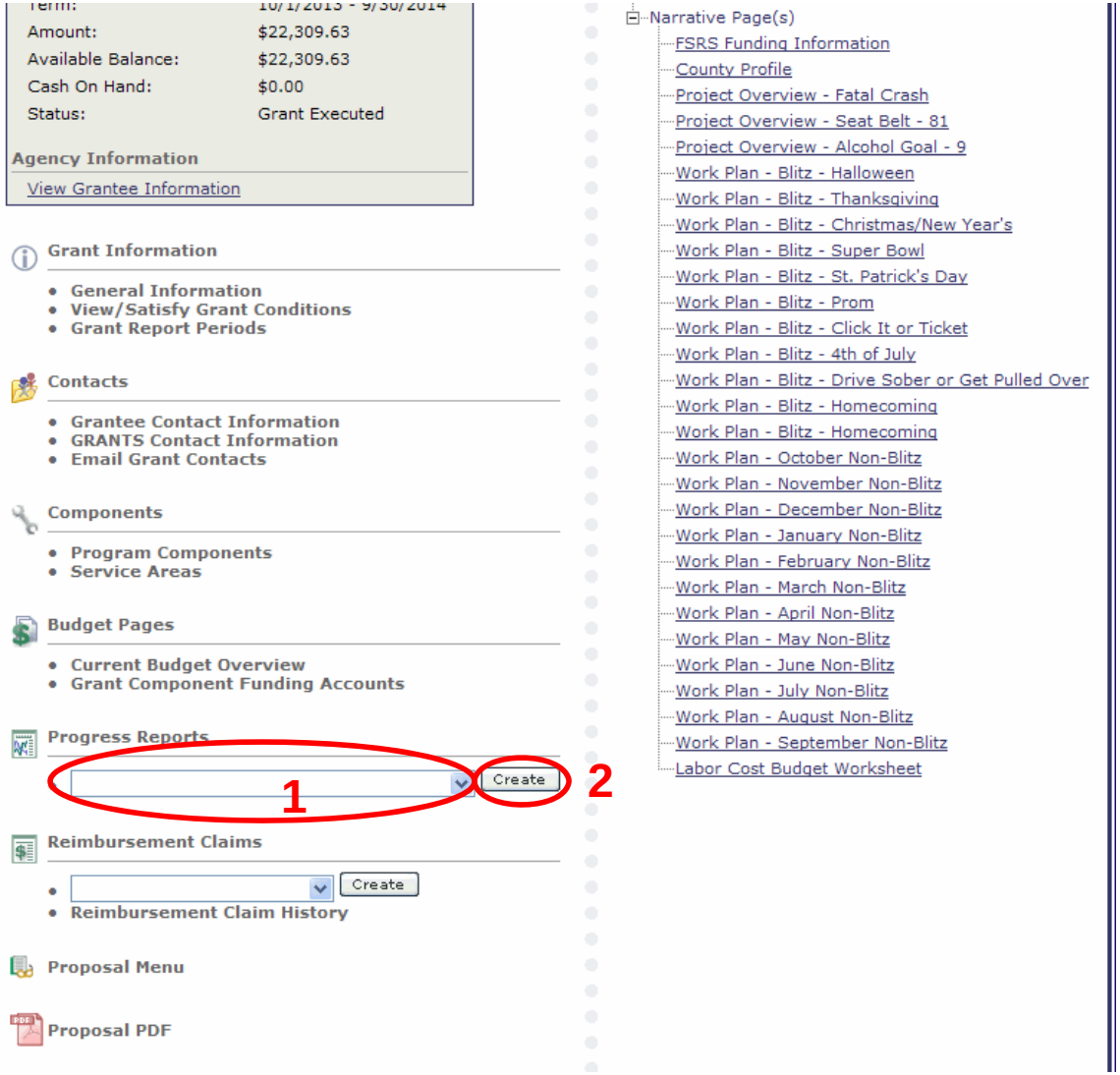
- A narrative progress report is required for each quarter. It is due the 15th of the month following the end of the quarter. (Example: The first quarter (October – December) is due January 15th.)

Narrative Progress Reports

To initiate the report:

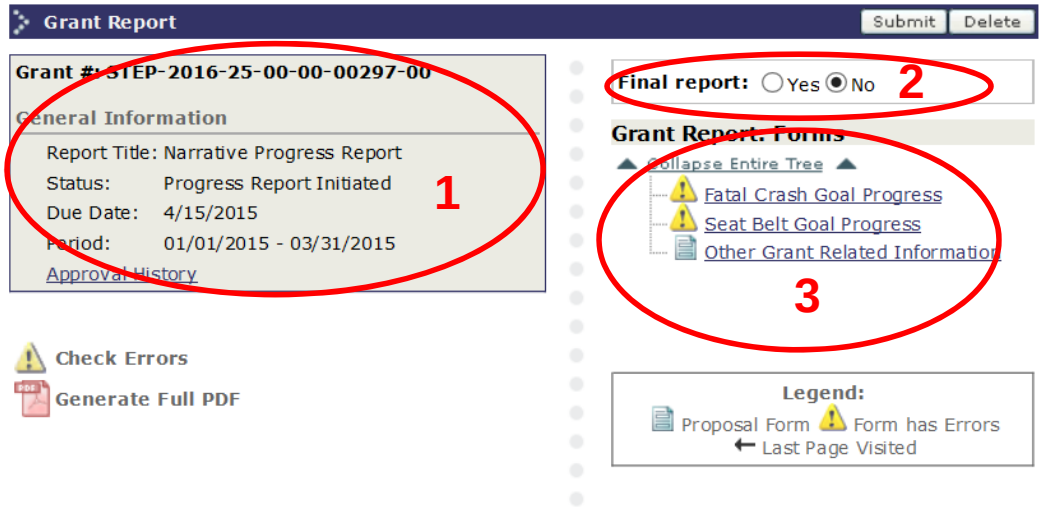
1. Select the report from the drop down menu.

2. Click the “Create” button.



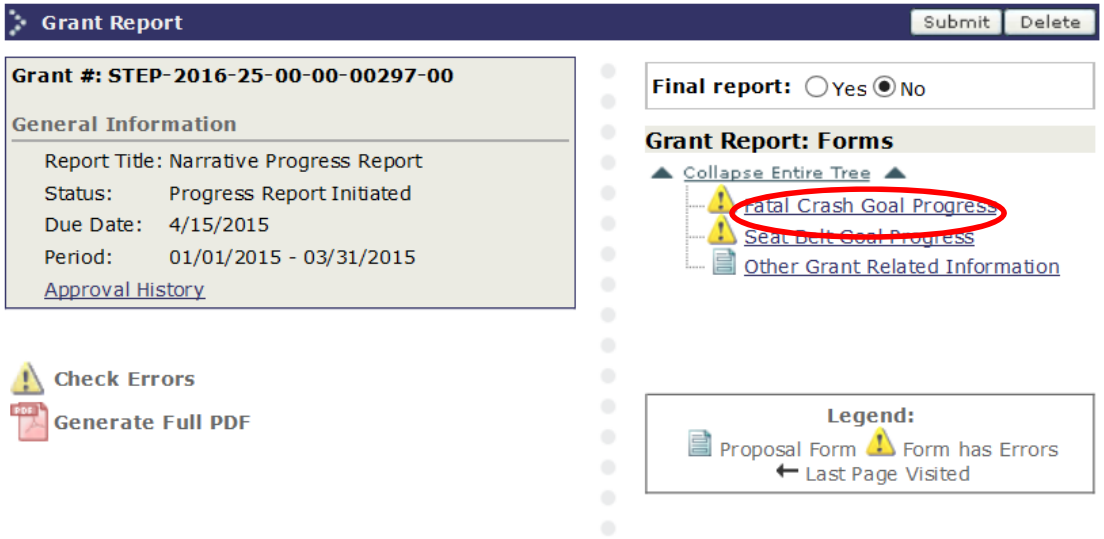
Narrative Progress Report Menu

1. General Information Box lists the report title, the current status of the report, the due date of the report and the period that this report covers.
2. Final Report: Default is “no”. This is correct until the last narrative report for the year (July - September). If you tell the system “yes”, the system will not generate additional narrative reports.
3. Grant Report Forms: List of all forms in the Narrative Progress Report.



Narrative Progress Report

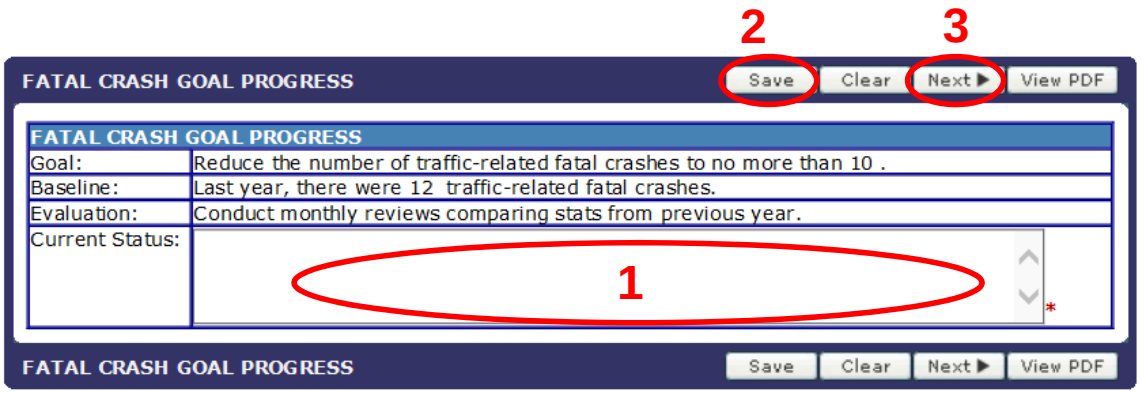
Click on Fatal Crash Goal Progress to begin filling out the forms.



Fatal Goal Progress

The report pulls forward your goal, baseline and evaluation from your grant.

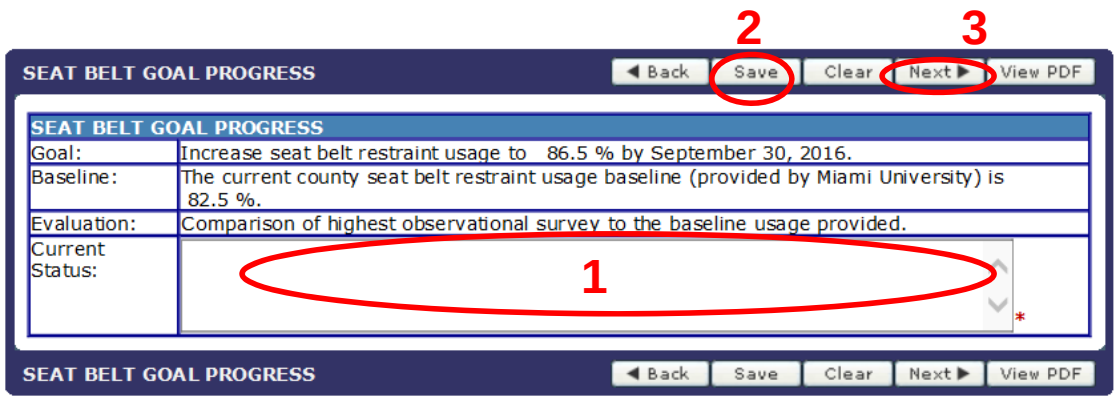
1. Using your evaluation as a guide, enter the current status of the goal. Example: This quarter we had 1 traffic-related fatal crash. Last year we had 2 traffic-related fatal crashes during the same time frame.
2. Click “Save”.
3. After the page has processed, click “Next”.



Seat Belt Goal Progress

The report pulls forward your goal, baseline and evaluation from your grant.

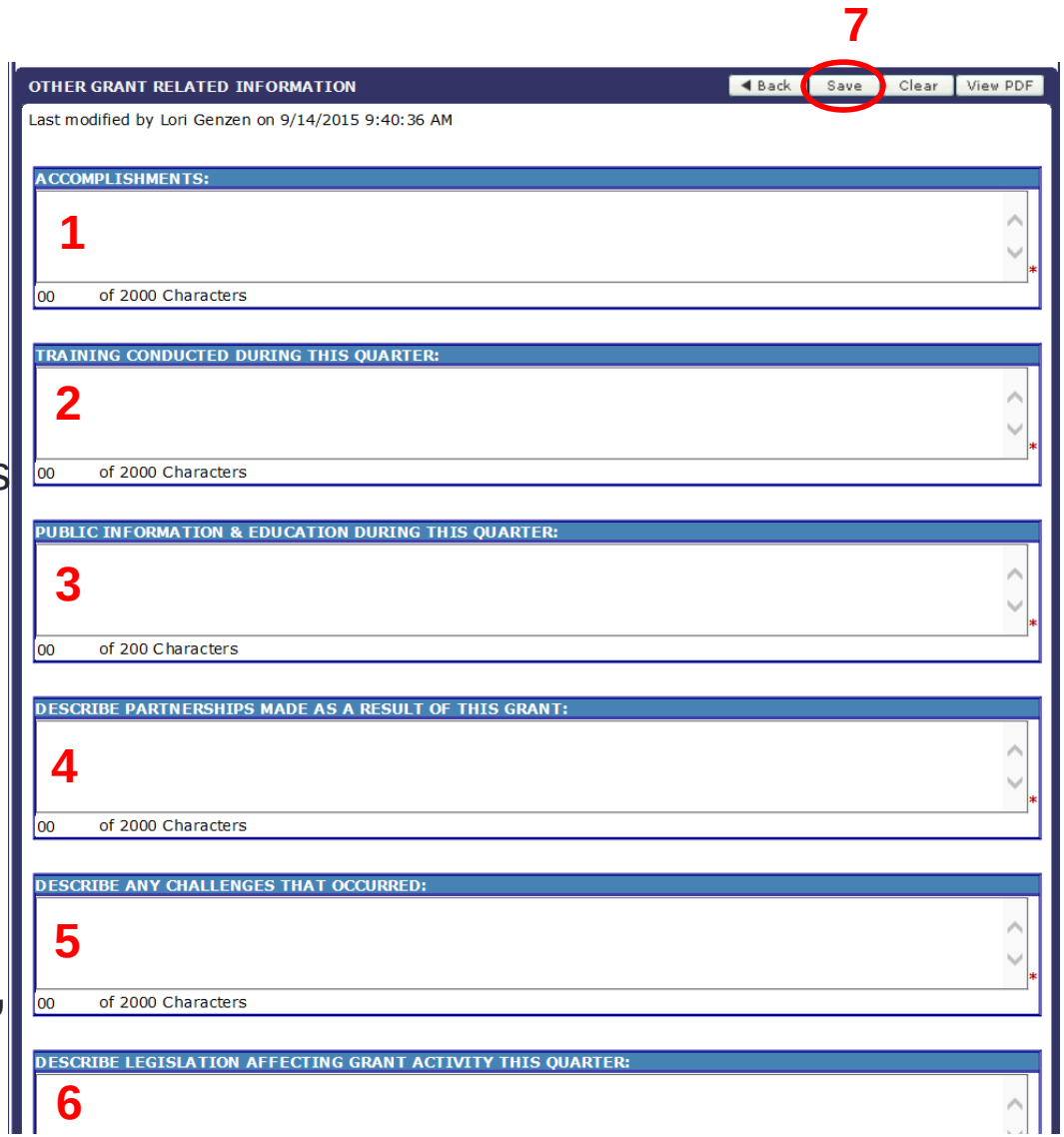
1. Using your evaluation as a guide, enter the current status of the goal. Example: The current seat belt rate provided by Miami University is 75% or the seat belt rate has not been updated by Miami University.
2. Click “Save”.
3. After the page has processed, click “Next”.



Other Grant Related Information

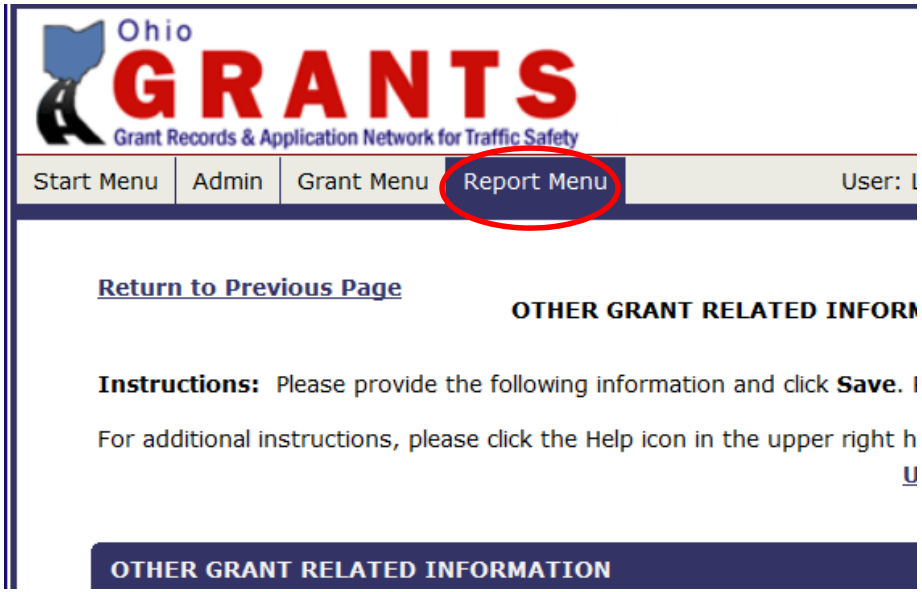
1. Enter any accomplishments during this quarter.
2. Enter any training conducted during this quarter.
3. Enter any Public Information & Education efforts during this quarter.
4. Enter any partnerships made this quarter.
5. Enter any challenges that occurred this quarter.
6. Enter any legislation during this quarter.
7. Click “Save”.

Note: If there was no activity in any of these fields for the quarter, enter none or n/a.



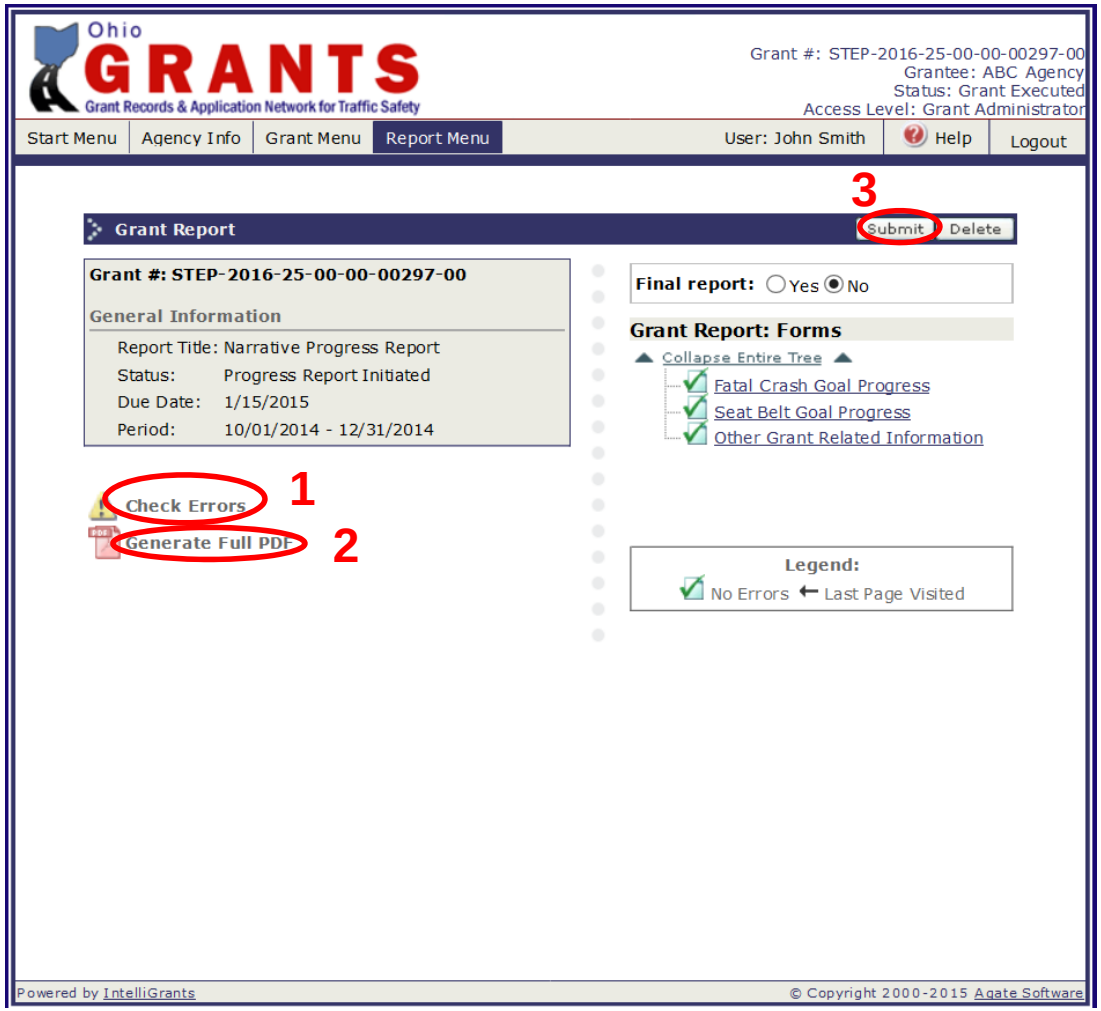
Other Grant Related Information

After the page has been saved, click “Report Menu”.



Narrative Progress Report Menu

1. When you are certain all data has been entered accurately and completely, click “Check Errors” to see if there are any system errors to fix prior to submitting.
2. If you would like a PDF of the report to print or save to your computer, click “Generate Full PDF”.
3. If there are no errors, click the “Submit” button.



Report Submitted

Once your report is successfully submitted, you will see a confirmation at the top of the screen and the status will change in the General Information box.

Click “Grant Menu” to return to the Grant.

Annual Report

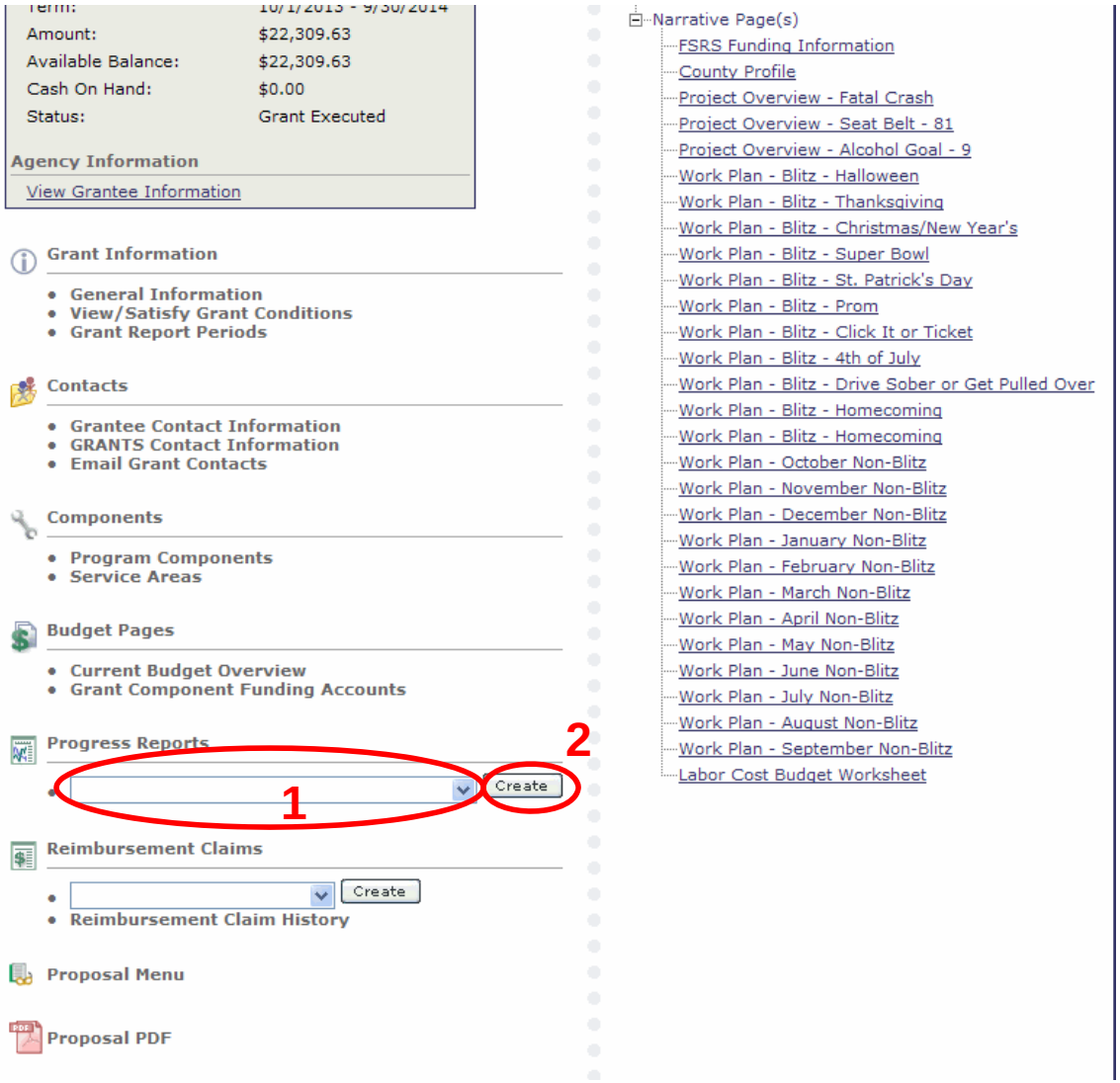
- A final comprehensive annual project activity report must be submitted to OTSO by October 15, 2017.
  - Final reports not received by November 1 will result in a 10 percent penalty deduction to the final claim reimbursement.
  - If a final project activity report is received after November 15, the final claim will not be reimbursed.
- The annual report will be available in the GRANTS System by August 31, 2017.

Annual Report

To initiate the report:

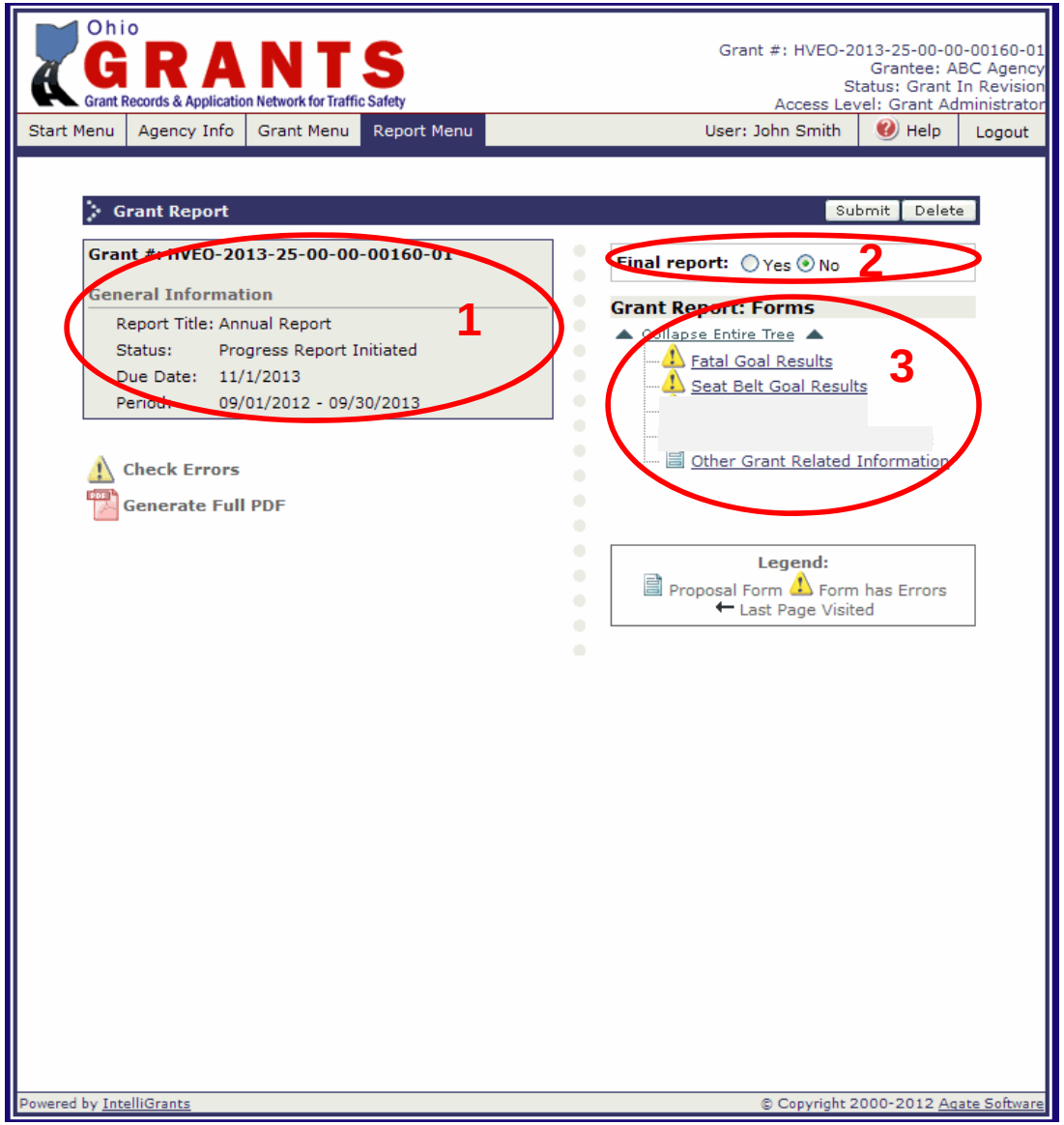
1. Select the report from the drop down menu.

2. Click the “Create” button.



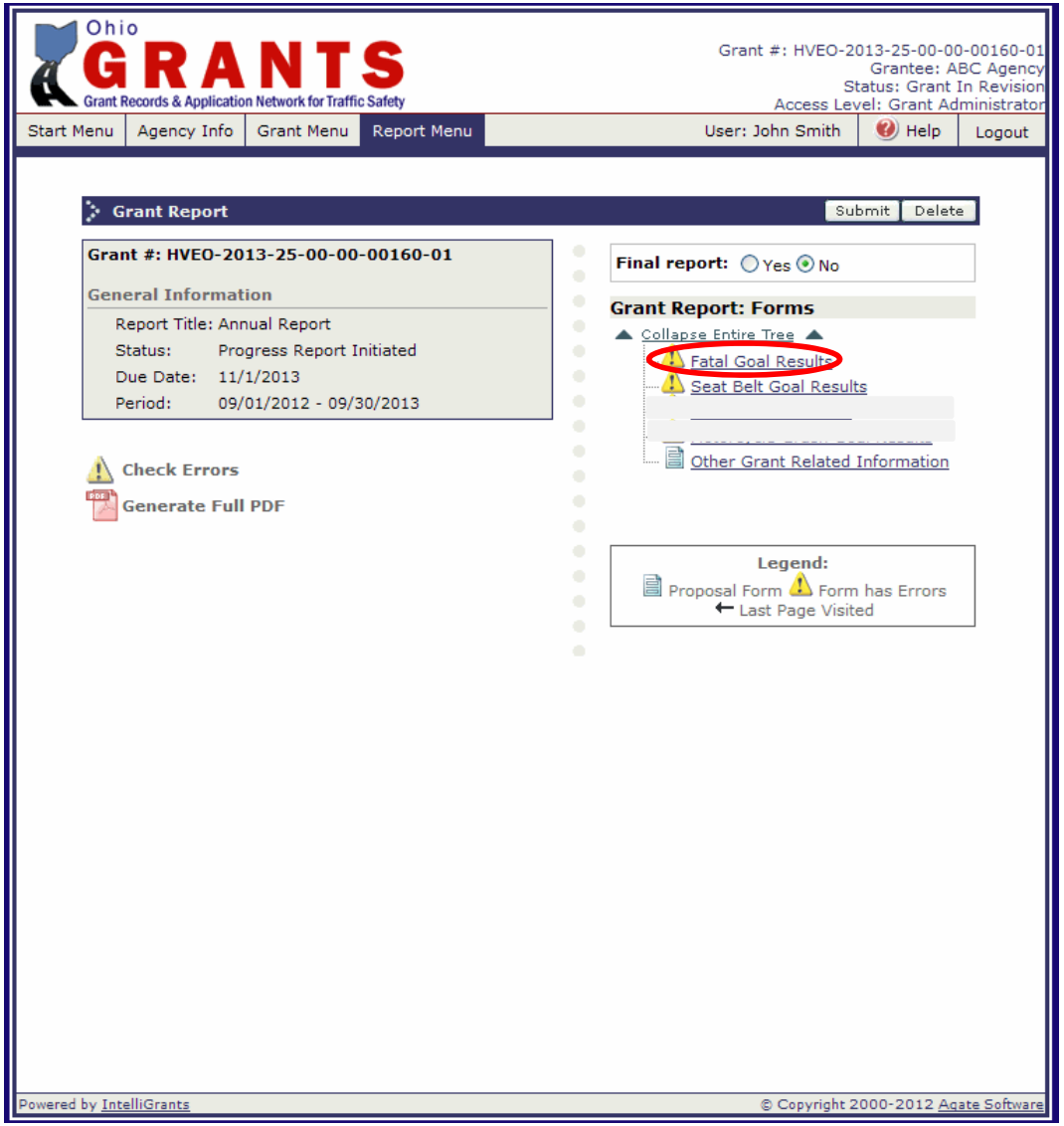
Annual Report Menu

1. General Information Box lists the report title, the current status of the report, the due date of the report and the period that this report covers.
2. Final Report: Default is “no”. Change to “Yes”.
3. Grant Report Forms: List of all forms in the Annual Report.



Annual Report Menu

Click on Fatal Goal Results to begin filling out the forms.



Fatal Goal Results

The report pulls forward your goal and baseline from your grant.

1. Using the goal, enter the end result compared to the goal and why or why not. Ex: This year we had 4 fatal crashes exceeding our goal of 5. We were able to exceed our goal due to the concentration of enforcement in our problem areas or we have had 6 fatal crashes; we did not meet our goal of 5. We did not meet our goal because we had more motorcycle fatal crashes this year.
2. Click “Save”.
3. After the page has processed, click “Next”.

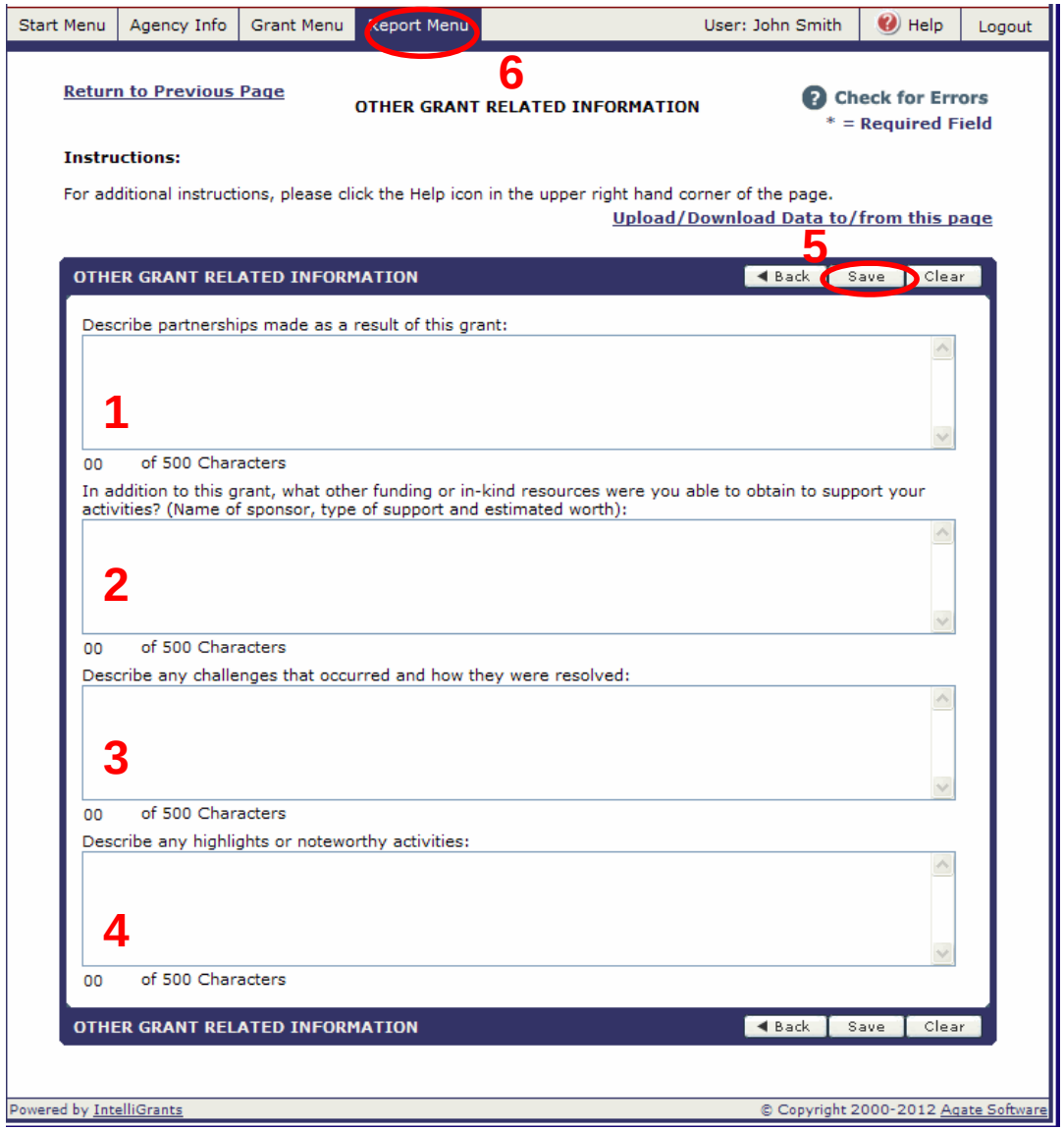
Seat Belt Goal Results

The report pulls forward your goal and baseline from your grant.

1. Using the goal, enter the end result compared to the goal and why or why not. Ex: The current seat belt usage rate provided by Miami University is 78%. We were able to exceed our goal by increasing seat belt enforcement or the current seat belt usage rate provided by Miami University is 75%. We did not meet our goal because XXXX.
2. Click “Save”.
3. After the page has processed, click “Next”.

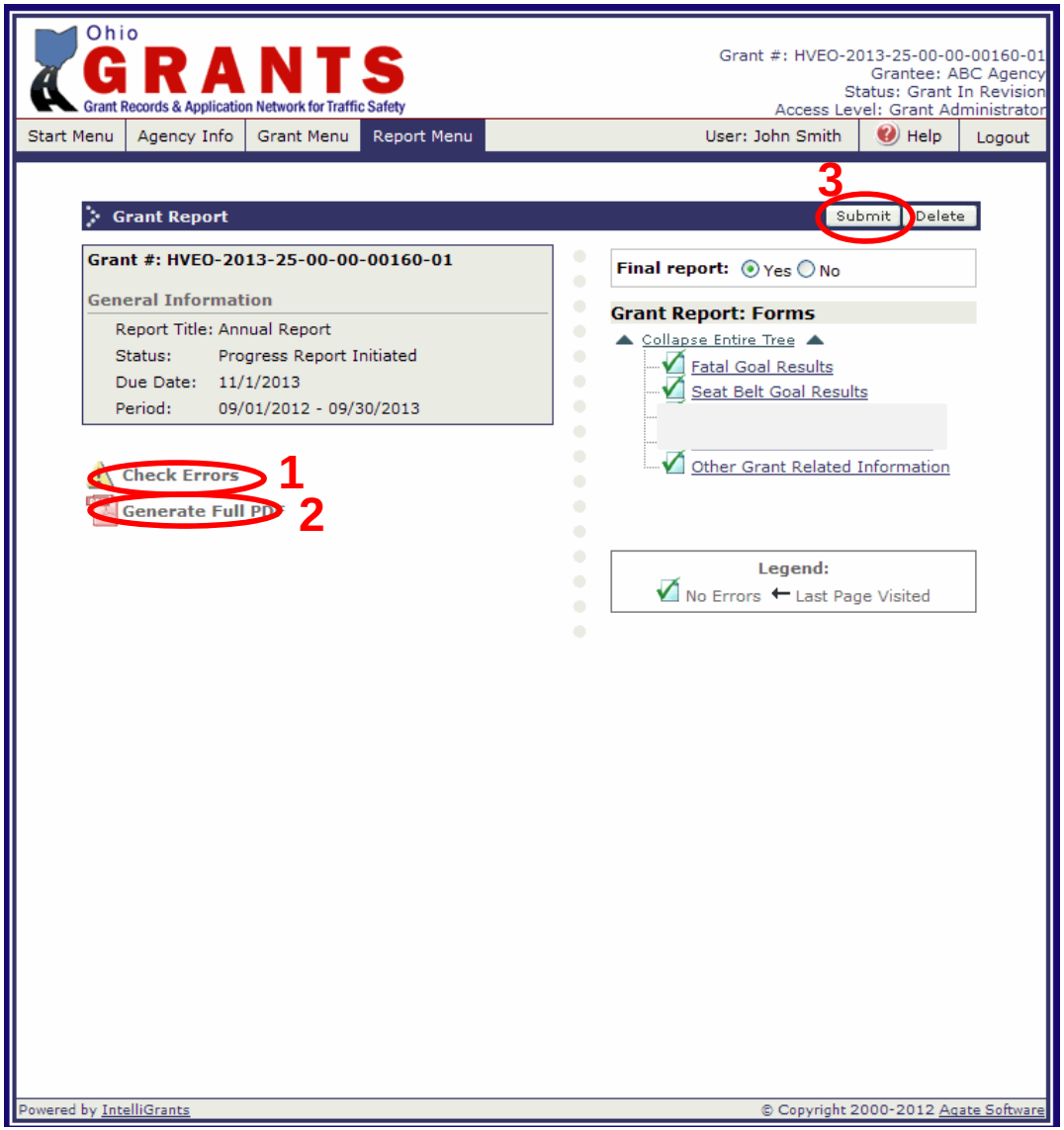
Other Grant Related Information

1. Describe any partnerships made during the grant year.
2. List any other funding or in-kind resources that were obtained during the grant year.
3. Describe any challenges during the grant year and how they were resolved.
4. Describe any highlights or noteworthy activities that happened during the grant year.
5. Click “Save”.
6. After the page has been saved, click “Report Menu”.



Annual Report Menu

1. When you are certain all data has been entered accurately and completely, click “Check Errors” to see if there are any system errors to fix prior to submitting.
2. If you would like a PDF of the report to print or save to your computer, click “Generate Full PDF”.
3. If there are no errors, click the “Submit” button.



Report Submitted

Once your report is successfully submitted, you will see a confirmation at the top of the screen and the status will change in the General Information box.

Click “Grant Menu” to return to the Grant.

Report Submitted Process

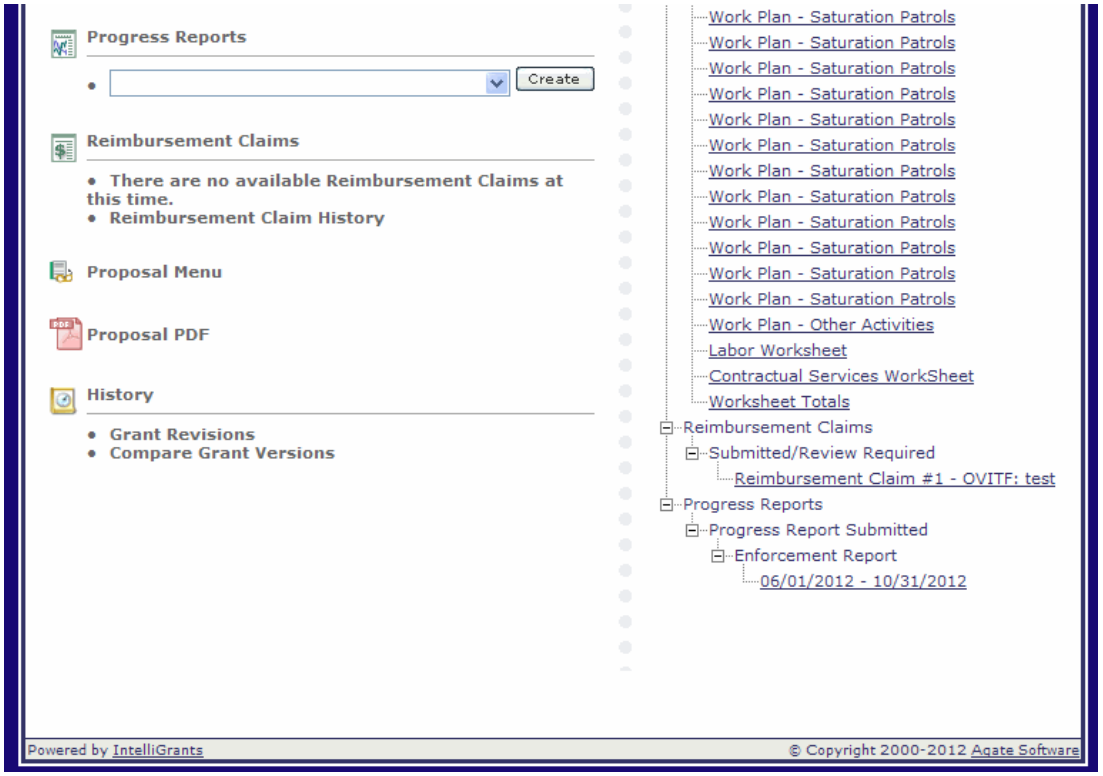
Once the report has been submitted to our office, it goes through a review process.

The report will be under "**Progress Report Submitted**" until the review is complete.

If it is approved, it will be under "**Progress Report Approved".**

If it is sent back for modifications, you will receive an email and it will be under **"Progress Report Modifications Required".**

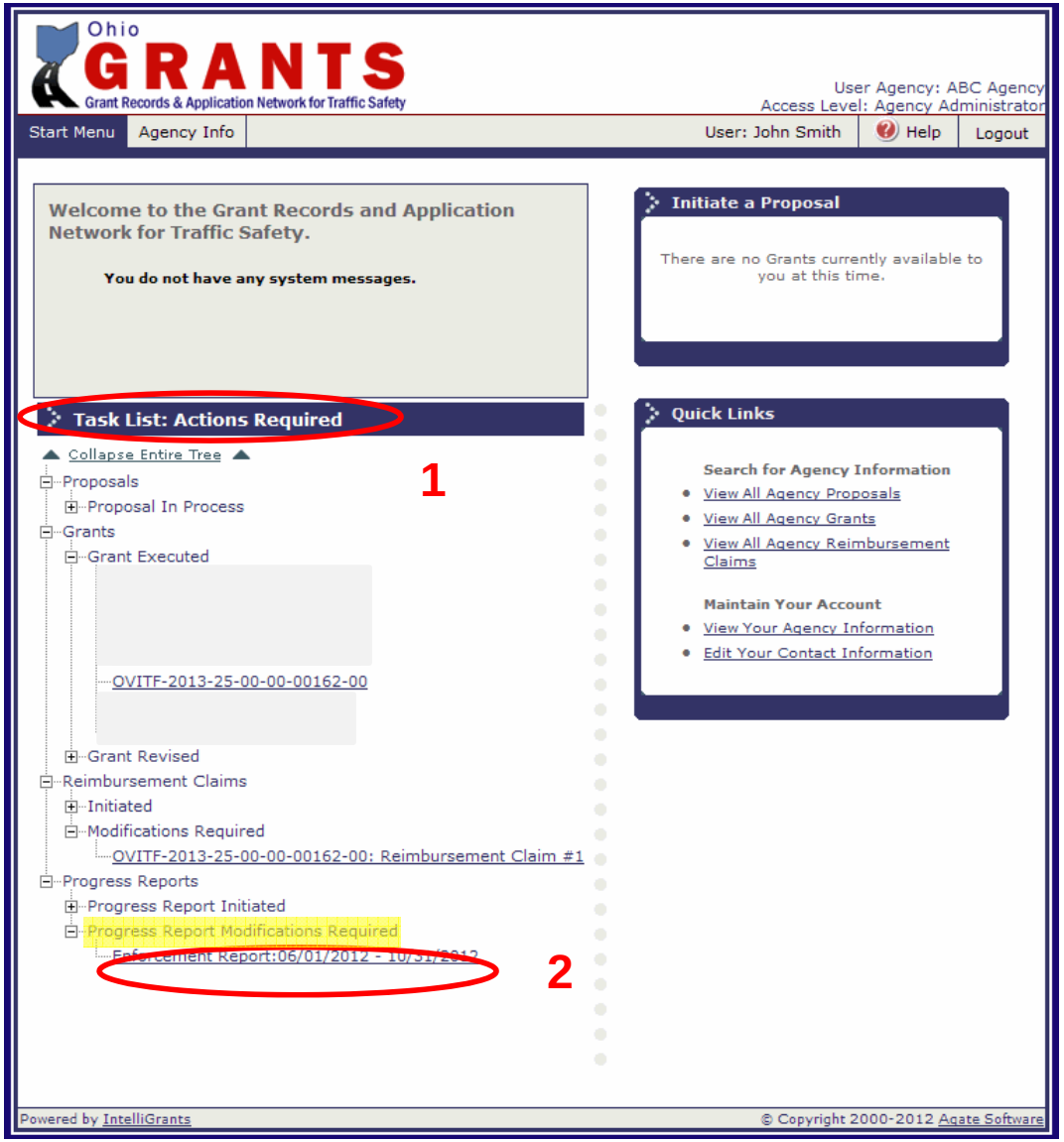
Log into the GRANTS System to make the modifications.



Note: If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.ohio.gov are being blocked as spam.

Report Modifications

1. On the Start Menu, under the Task List, any items that need modifications will be listed.
2. Click on the link for the report you want to modify.



Report Modification

1. Modifications that are required will be listed on the Report Menu outlined in a red box.
2. Complete the changes, return to the Report Menu and click "Submit" to re-submit the report.

Check the box next to Report Process on the Pre-Activity Form.

Reimbursement Claim Process

- Reimbursement claims will be due either the 15th of the following month for monthly claims (Example: October claim will be due November 15th) or the 15th of the month following the end of the quarter (Example: First quarter claim (October – December) will be due January 15th).
- Verify your claim schedule selection on the Pre-Activity Form. New sub-recipients must select monthly.
- Reimbursement claims can include previous activity but cannot go beyond the current claim period. (Example: The December claim can include a November expense, but not a January expense).
- If there is no activity, you must submit a zero claim.

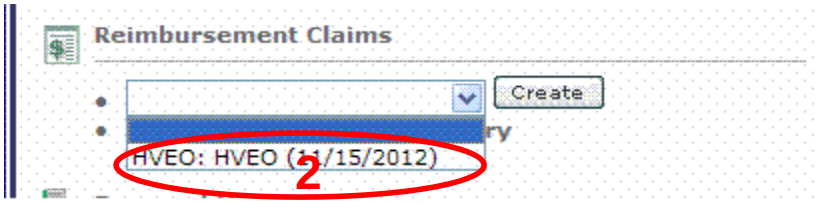
Reimbursement Claim Process

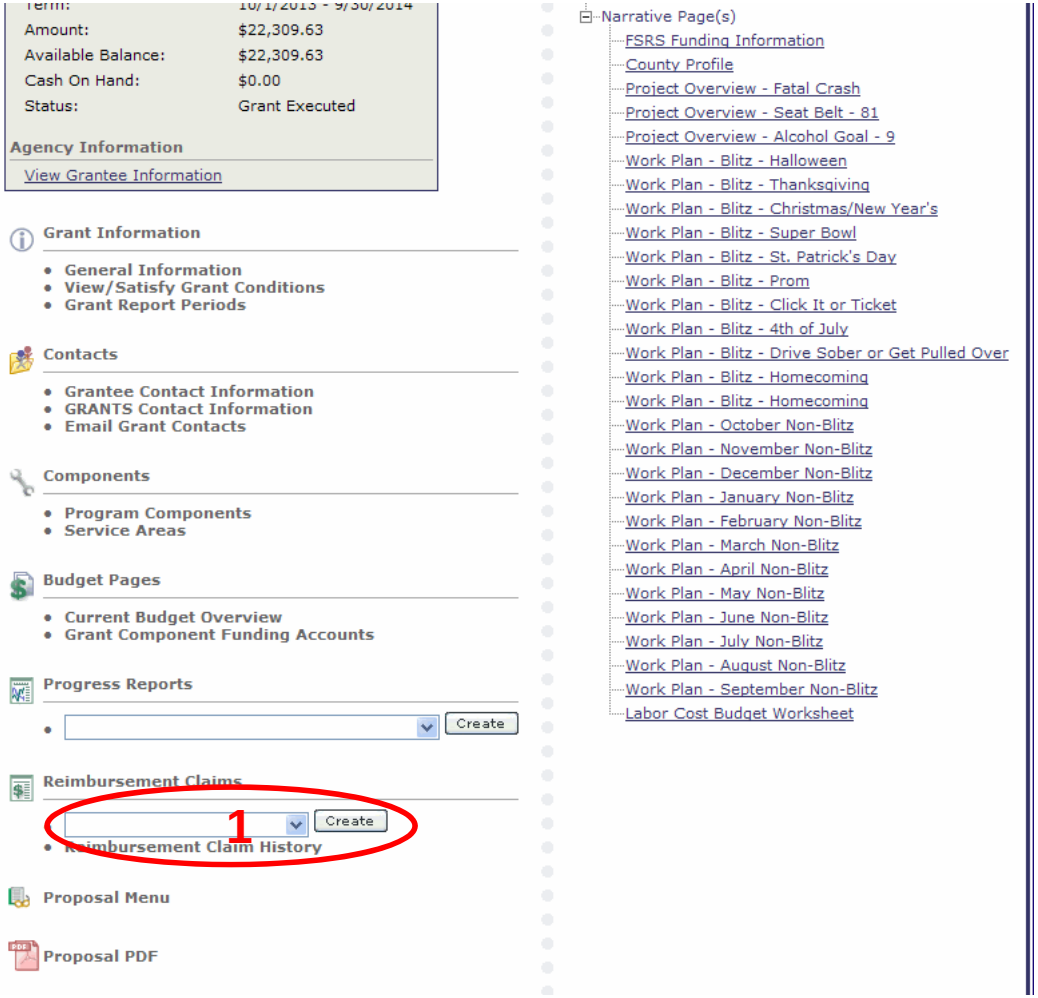
1. Reimbursement Claims will be listed in the drop down under Reimbursement Claims.

Claims will be in the drop down the first day of the claim period. (Ex. May Claim will be in the drop down May 1st).

2. The date listed is the date the claim is due. If a progress report is past due, you will not be able to submit a claim (or re-submit a claim that was sent back for modifications).

Only one claim can be processed at a time. The next claim will not show up in the drop down until the previous one has been approved.



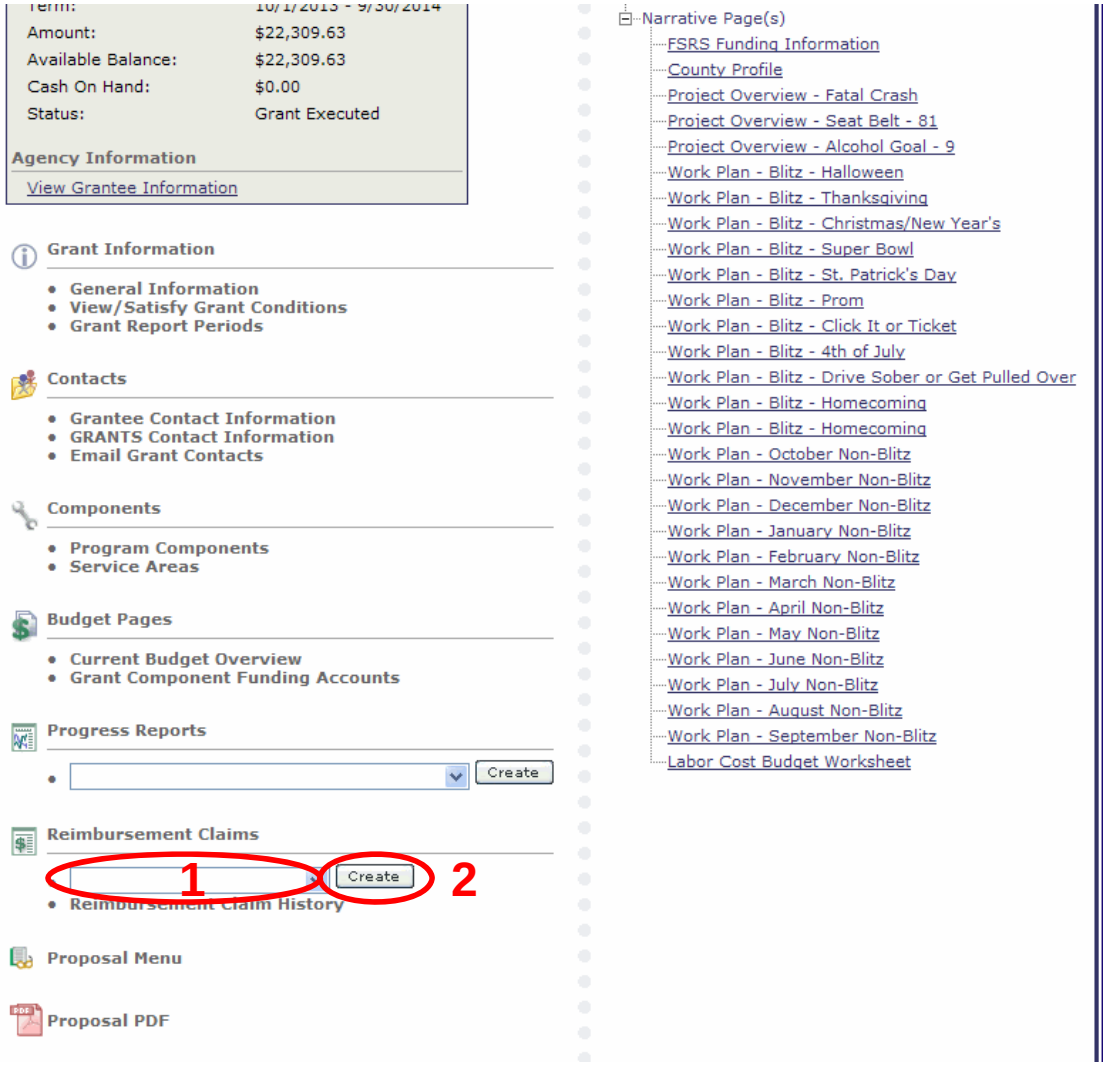


Reimbursement Claim Process

To initiate the reimbursement claim:

1. Select the claim from the drop down menu.

2. Click the “Create” button.



Reimbursement Claim Process

1. The Expense Summary Page shows grant information.

2. Budget Information

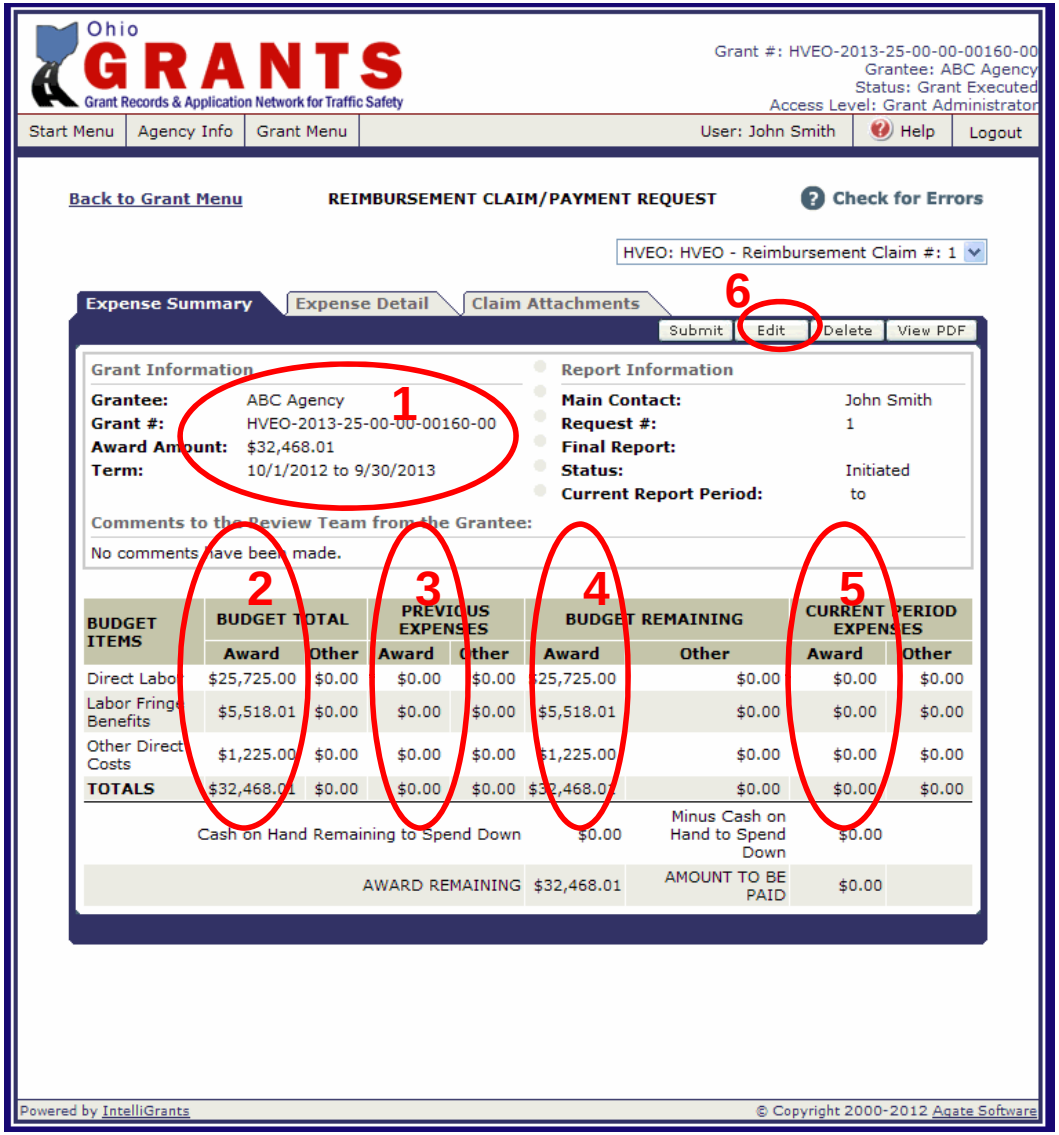
3. Previous Expenses will show after the first claim has been approved.

4. Budget Remaining (Award – Previous Claim)

5. Current Period Expenses (once you add Expense Detail items these fields will self-populate).

Every time a subsequent claim is initiated, the previous expenses and budget remaining will update to include all previous approved claims.

6. Click the “Edit” button.



Reimbursement Claim Process

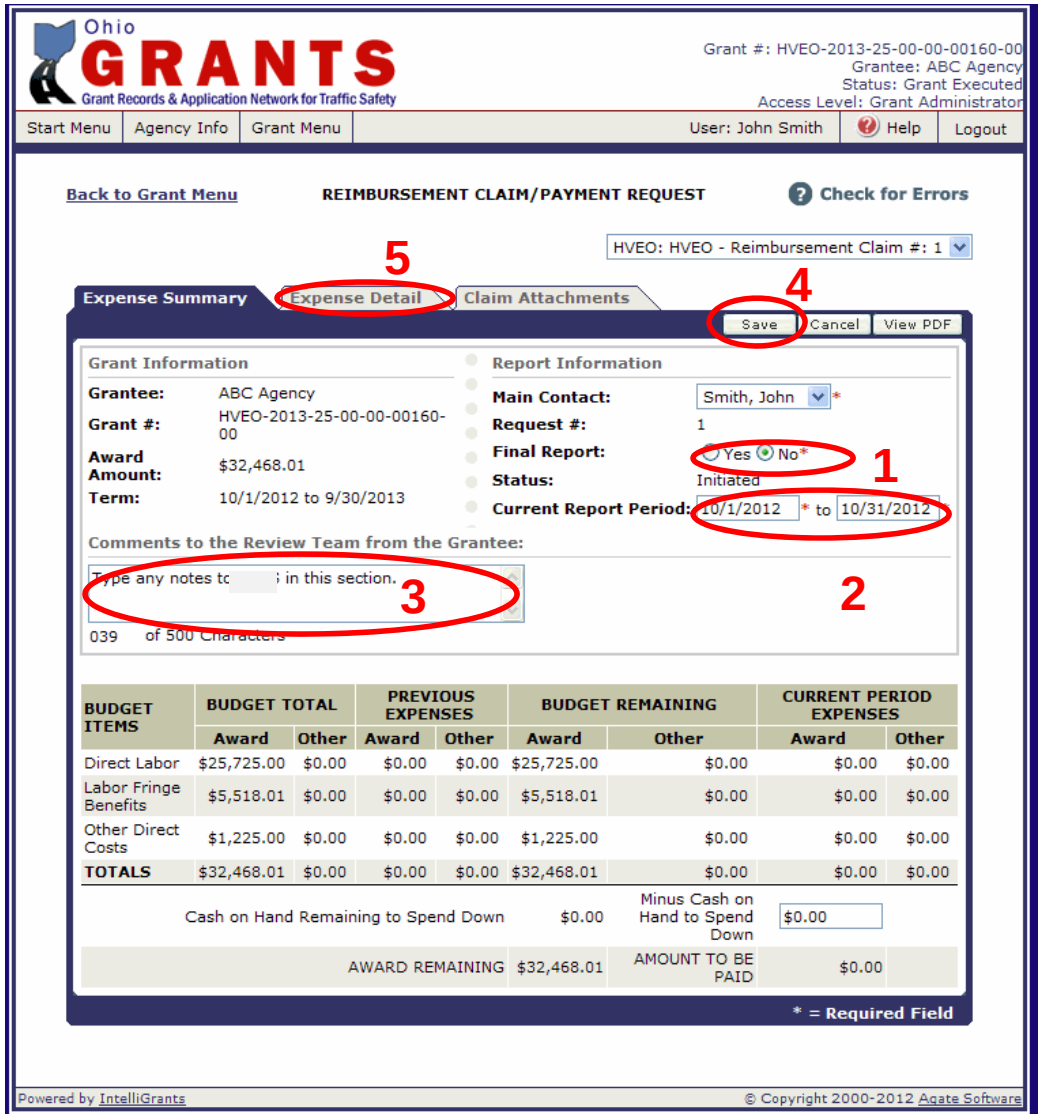
1. Unless it is the final claim for the year, select “No” for Final Report. If you select “Yes” the system will not issue any more Reimbursement Claims.

2. Enter the reporting period. Typically it would be the beginning of the month (or quarter) to the end of the month (or quarter). However, if you need to claim an expense from a previous reporting period you will need to make the beginning date the date of the earliest expense. (Ex. November claim would normally be 11/1/2016 to 11/30/2016. If you have an invoice from 10/17/2016 to claim, the reporting periods would be 10/17/2016 to 11/30/2016).

3. Comments – If you have any comments/notes you would like the OTSO review team to see regarding your reimbursement claim, enter them here.

4. Click the “Save” button.

5. Click the “Expense Detail” tab.

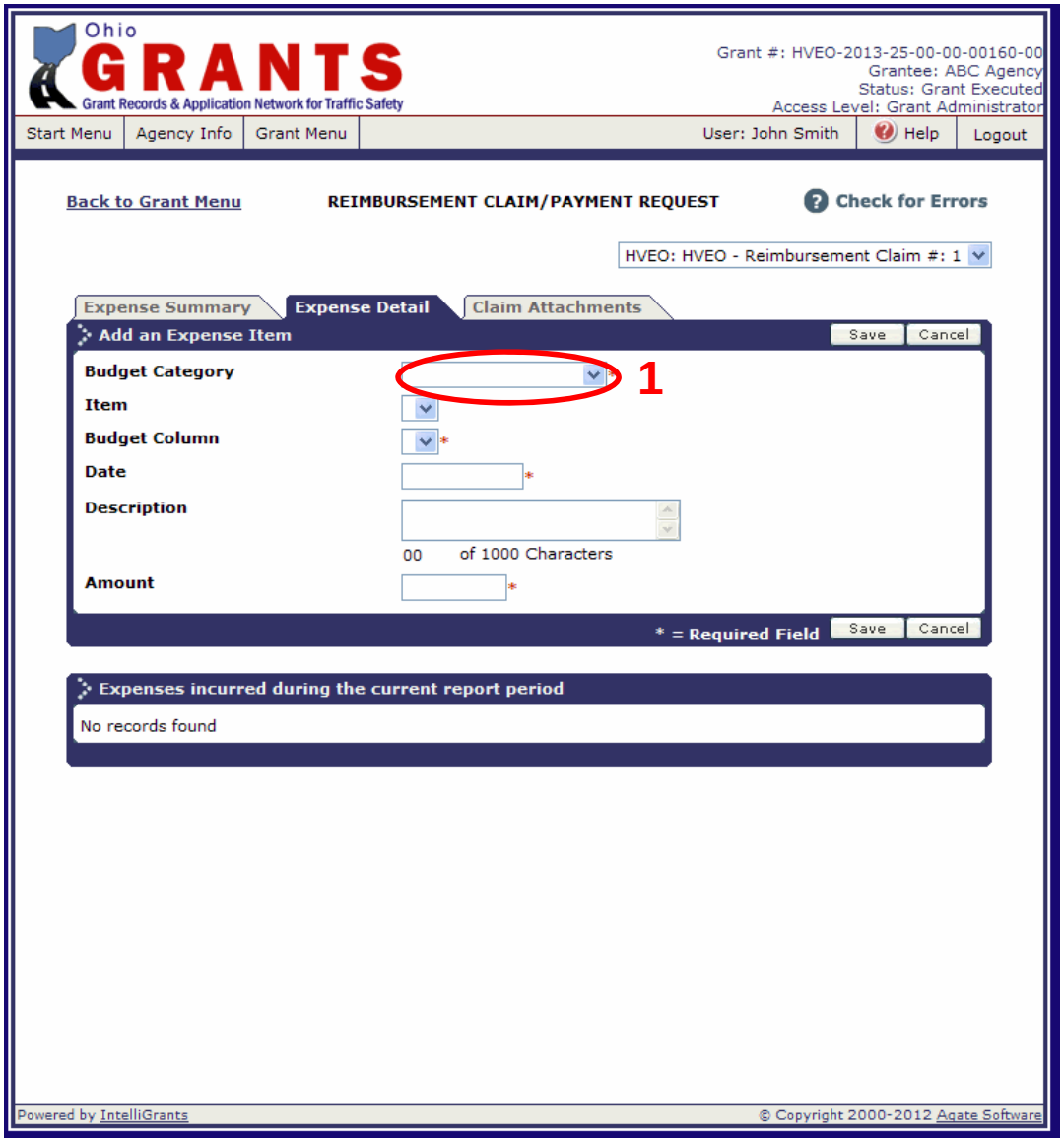


Reimbursement Claim Process

Use this screen to enter each expense for the reimbursement claim. The fields required for each expense will change based on the budget category selected.

1. Select the budget category from the drop down. Make sure you are putting the expense in the appropriate category.

Wait for the page to refresh.

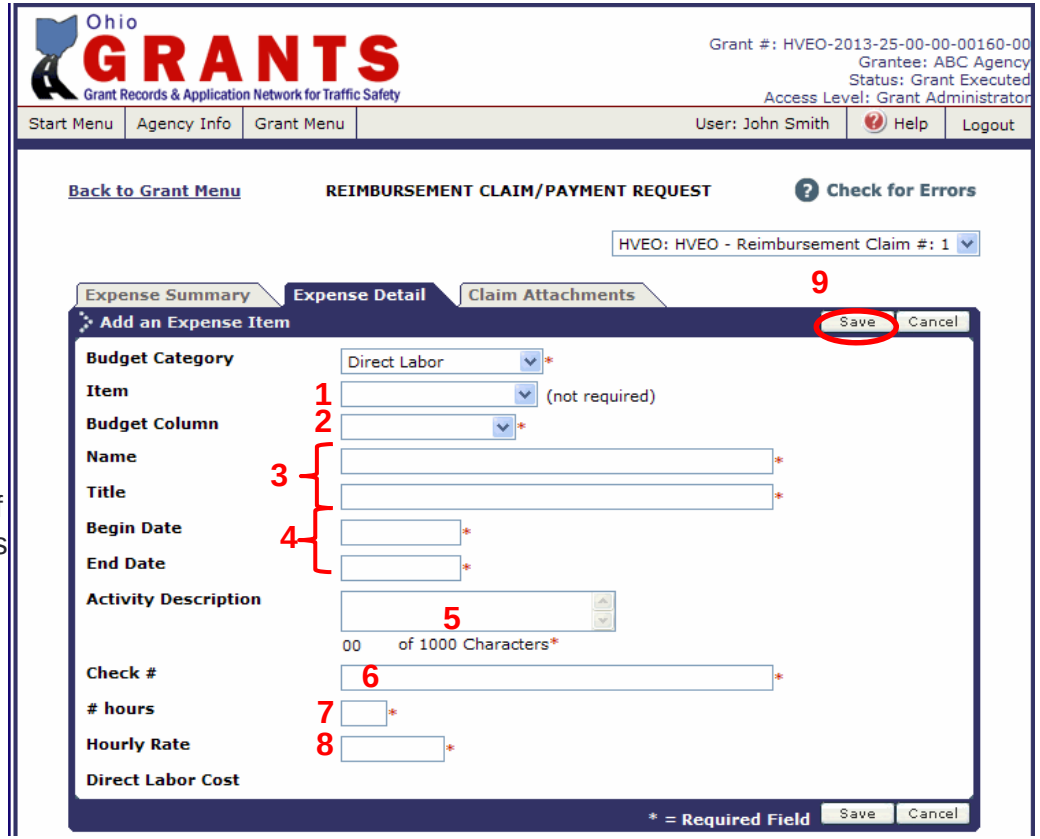


Reimbursement Claim Process

Direct Labor

1. Item: Not required
2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.
3. Name/Title – Enter the Employee's Name and Title.
4. Begin Date/End Date – Enter the beginning date and ending dates of the labor that is being claimed.
5. Activity Description –If claiming for blitz, mark the blitz name. If claiming for non-blitz, mark the activity non-blitz. If you have a person that worked a combination of these activities on the same date range, break the hours out in the activity description. (Ex. Halloween Blitz – 4 hours. Non-Blitz 4 hrs.) List the shift (hours) worked. (Ex. 7:00 pm – 11:00 pm)
6. Check Number – Enter either a check number if the person was paid with a check, or enter DD or EFT if the person was paid with Direct Deposit.
7. Enter the number of hours for that date range.
8. Enter the actual hourly rate the employee was **paid, not the rate entered in the proposal.**
9. Click the "Save" button.

NOTE: OTSO only pays for Labor that has been paid out to the employee. Comp Time is not allowable.

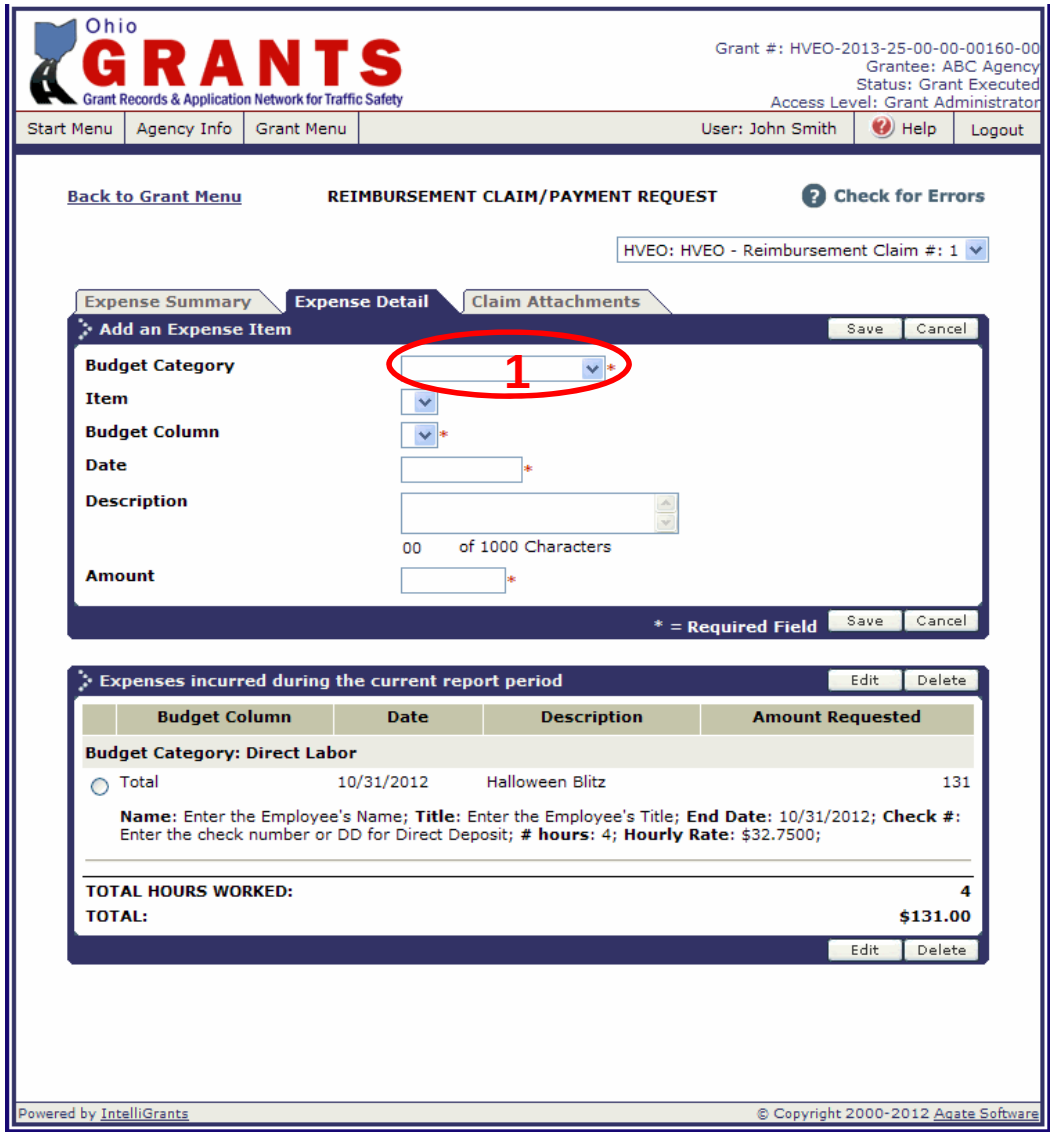


Remember: If the shift starts prior to midnight and ends after midnight, your end date will be different that your start date. If that shift goes over the end of the last month on the report period, you must split the hours between the claim. Example: Officer worked 10:00 pm 12/31/2016 to 2:00 am 1/1/2017. 2 hours will be on the claim ending 12/31 and 2 hours will be on the claim starting 1/1.

Reimbursement Claim Process

Once saved, the information will self-calculate and appear below the Add an Expense Item Box. As you continue to add expenses, they will continue to appear at the bottom.

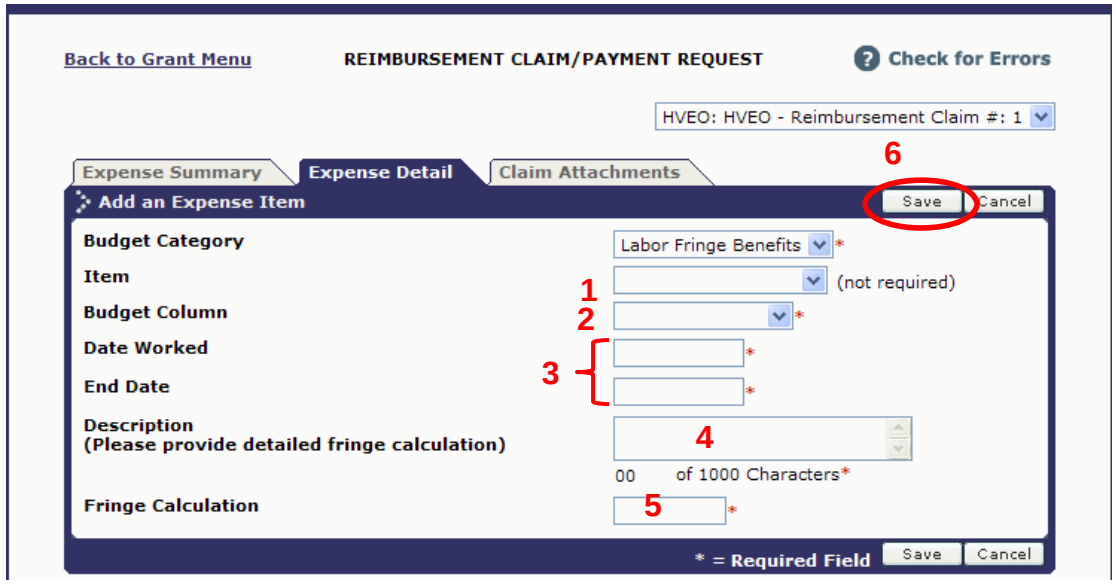
1. Select another budget category from the drop down and wait for the page to refresh to continue adding line items to the reimbursement claim.



Reimbursement Claim Process

Labor Fringe Benefits

1. Item: Not required
2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.
3. Date Worked/End Date – Enter the date range to cover the direct labor worked in the claim.
4. Description – enter “fringe”.
5. Fringe Calculation – enter the amount of fringe you are claiming.
6. Click the “Save” button.



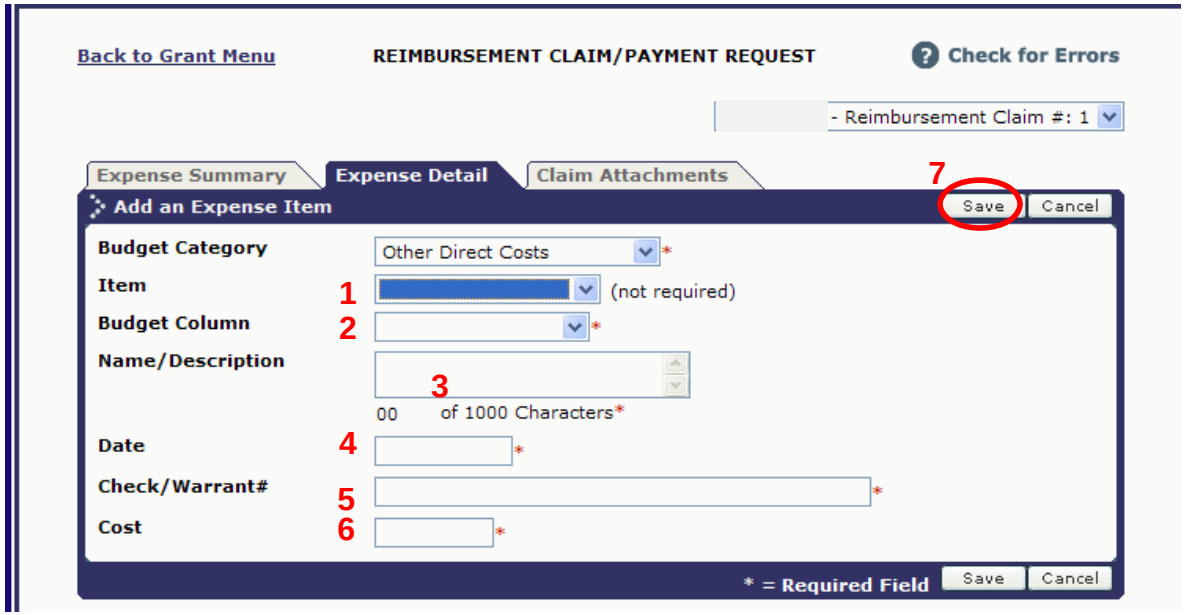
Note: Make sure you are claiming the actual amount of fringe that is being paid. Ex: If Worker’s Comp was 2.4% when you submitted the proposal and your agency is actually paying 1.7%, you can only claim 1.7%.

Make sure you are not claiming a higher percentage than you have been approved for in the grant. If you were approved for 21.75% you are not allowed to claim 24.5% without having a revision approved. You are allowed to claim less than you were approved for.

Reimbursement Claim Process

Other Direct Costs

1. Item: Not required.
2. Budget Column: Select from the drop down. This will show how much you have remaining in this budget category.
3. Name/Description – Enter "fuel/transportation cost"
4. Enter the activity date (if the activity spans the entire month, put the last day of the month).
5. Enter the Check or Warrant number used to pay for the item.
6. Enter the cost of the item.
7. Click the "Save" button.



Reimbursement Claim Process

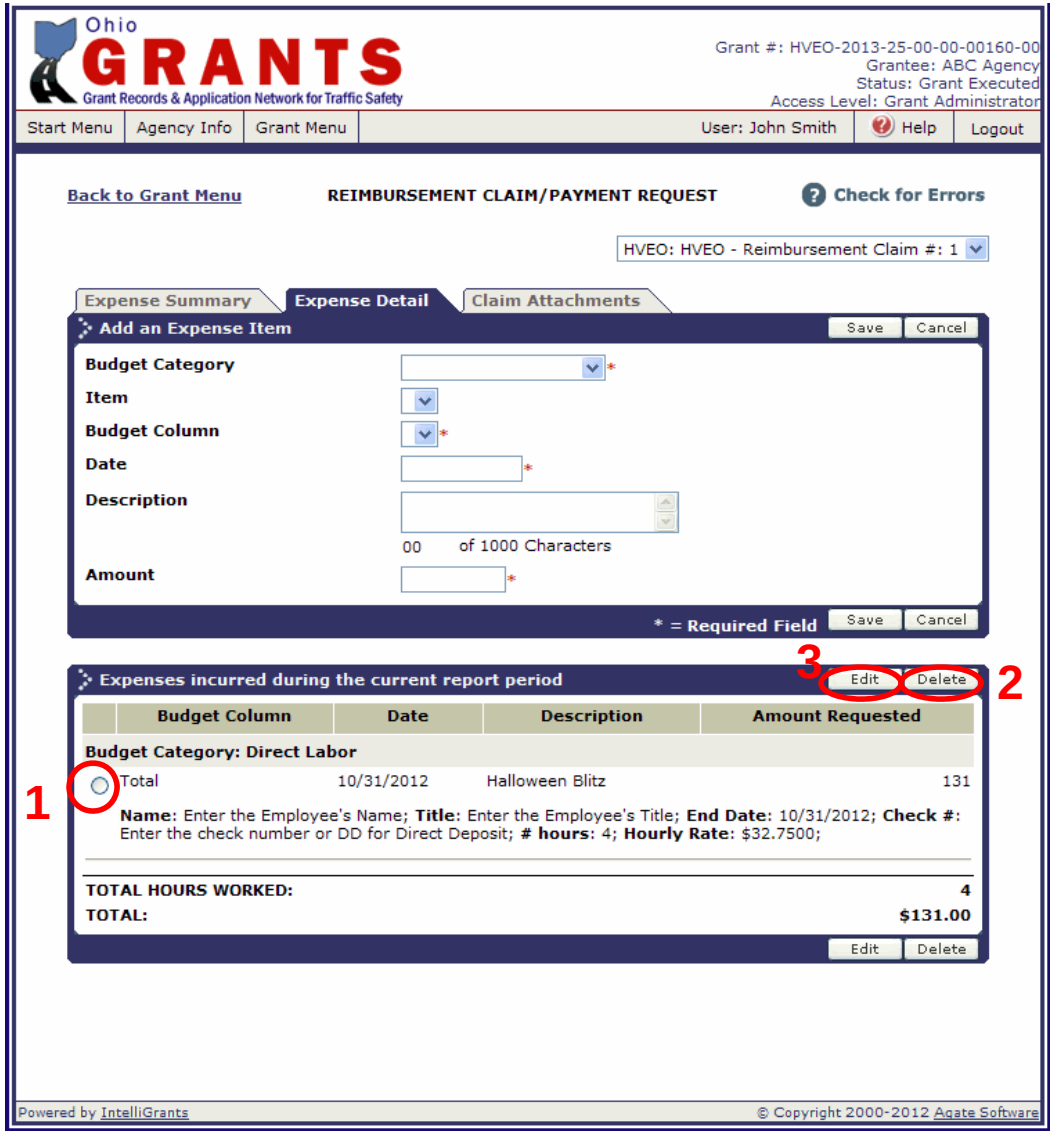
Once all entries have been made, review for accuracy.

If you find an expense line that has an error:

1. Click the radio button next to the item that needs correction.

2. If the entire line needs deleted (duplicate entry or incorrect budget category), click “Delete”.

3. If you just need to make changes, click “Edit”.

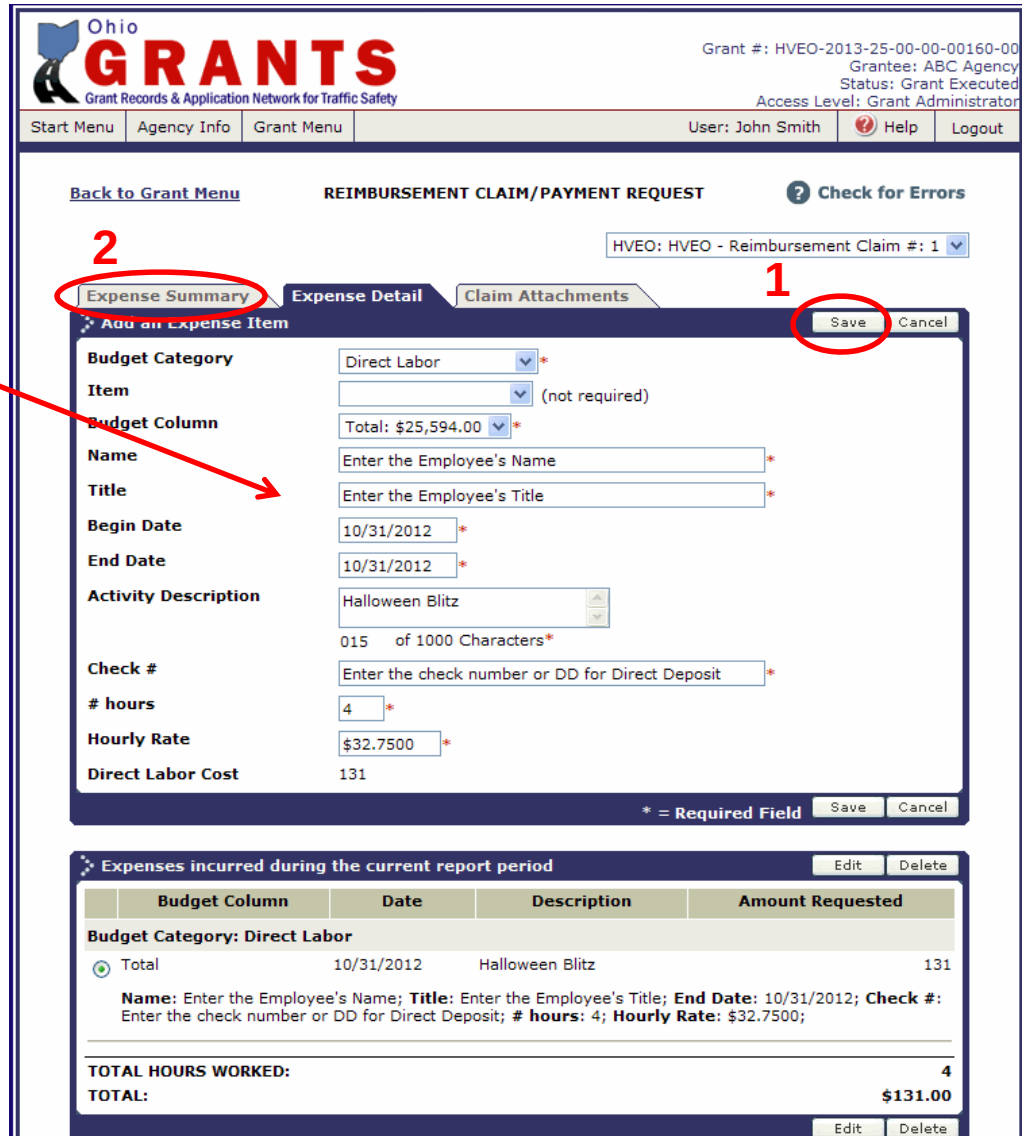


Reimbursement Claim Process

After you click edit, the top box will populate with the information previously entered.

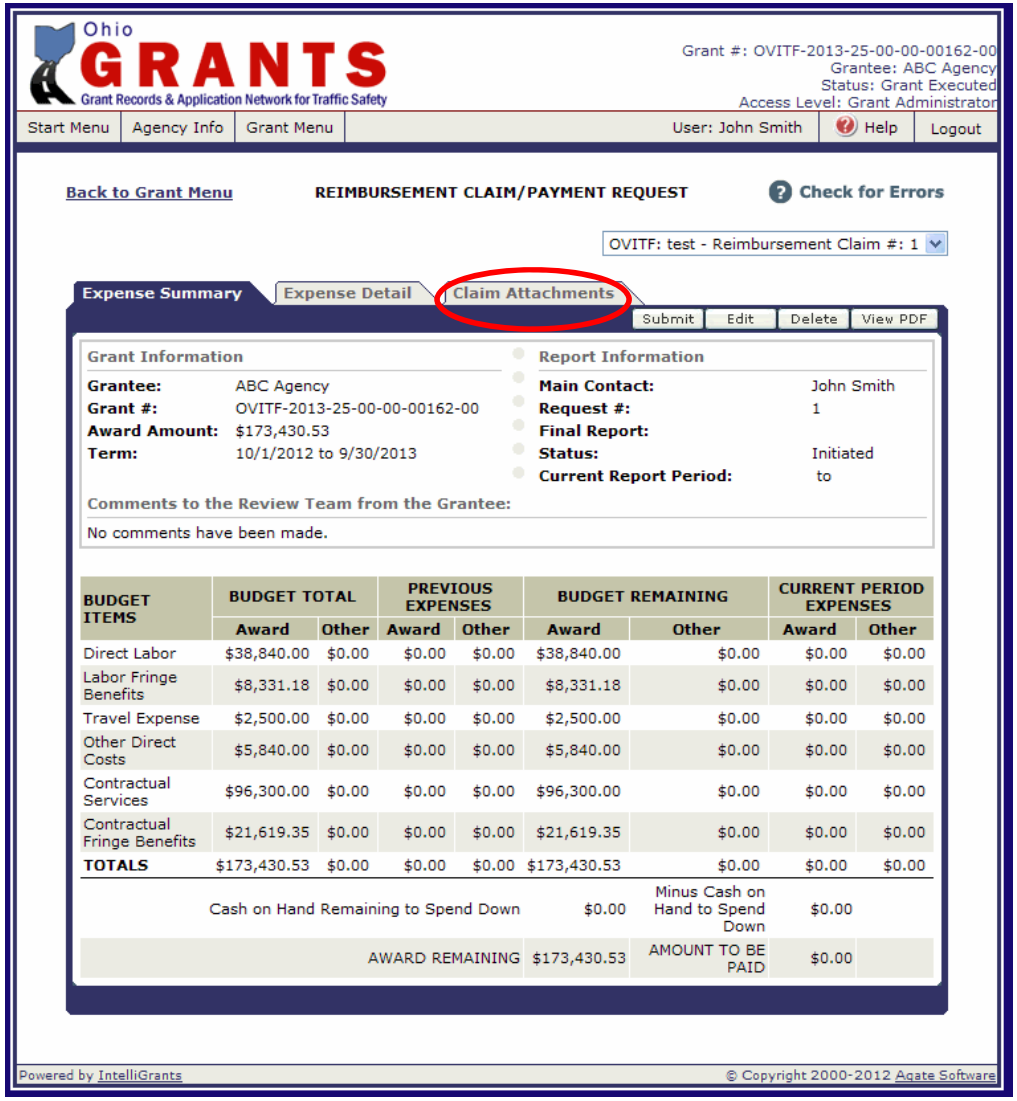
1. Make the necessary changes and click the “Save” button.

2. When you are certain all expenses have been entered accurately and completely, click the “Expense Summary” tab.



Reimbursement Claim Process

If you need to attach documentation to support charges in the reimbursement claim (invoices, task force invoices, travel receipts, etc.), click the “Claim Attachments” tab.



BUDGET ITEMS	BUDGET TOTAL		PREVIOUS EXPENSES		BUDGET REMAINING		CURRENT PERIOD EXPENSES	
	Award	Other	Award	Other	Award	Other	Award	Other
Direct Labor	$38,840.00	$0.00	$0.00	$0.00	$38,840.00	$0.00	$0.00	$0.00
Labor Fringe Benefits	$8,331.18	$0.00	$0.00	$0.00	$8,331.18	$0.00	$0.00	$0.00
Travel Expense	$2,500.00	$0.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$0.00
Other Direct Costs	$5,840.00	$0.00	$0.00	$0.00	$5,840.00	$0.00	$0.00	$0.00
Contractual Services	$96,300.00	$0.00	$0.00	$0.00	$96,300.00	$0.00	$0.00	$0.00
Contractual Fringe Benefits	$21,619.35	$0.00	$0.00	$0.00	$21,619.35	$0.00	$0.00	$0.00
TOTALS	$173,430.53	$0.00	$0.00	$0.00	$173,430.53	$0.00	$0.00	$0.00

Reimbursement Claim Process

Click “Add”.

Reimbursement Claim Process

1. Enter the title of the attachment. (Example: Travel Receipts)
2. Click “Browse” to locate the file on your computer.
3. Once the document is showing in the file path, click “Save”.

NOTE: When attaching PDFs, make sure the file name does NOT include any special characters (&, #, %, etc.)

Reimbursement Claim Process

1. If you need to attach additional documentation, click “Add” and follow steps 1 – 3 on the previous slide.
2. Once you have attached all documentation, click “Back to Claim”

Reimbursement Claim Process

The Current Period Expenses have now been totaled from the entries.

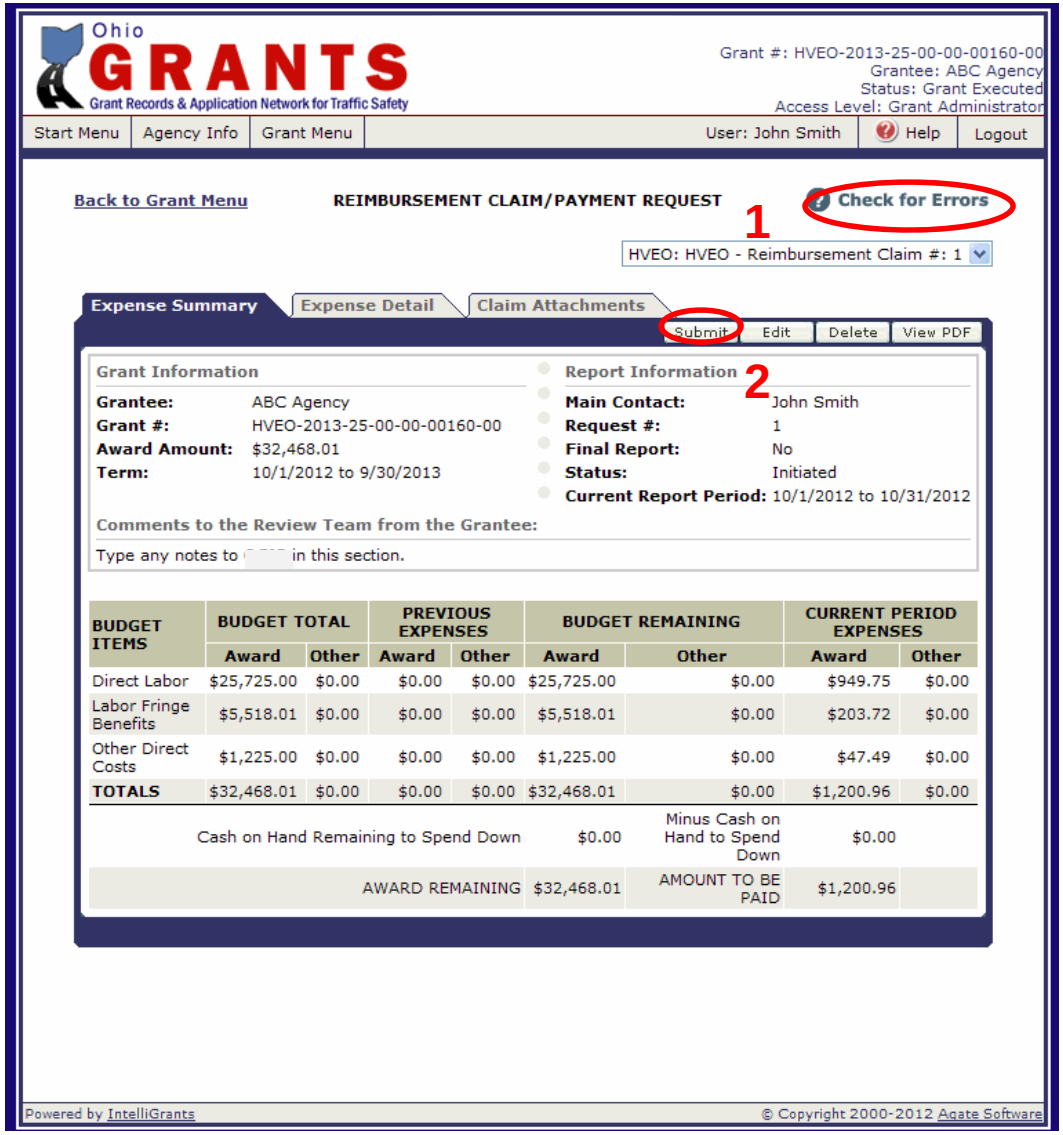
1. Click “Check for Errors” to see if there are any system errors to fix prior to submitting.

2. If there are no errors, click the “Submit” button.

Reminders:

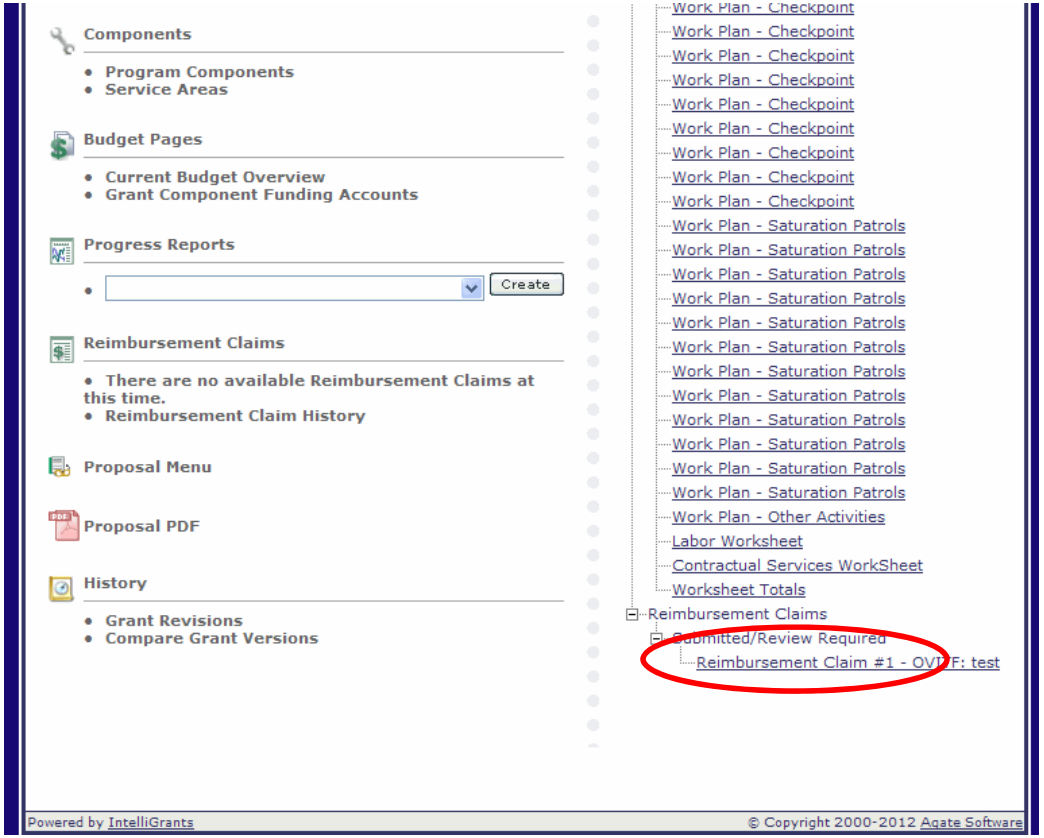
- You cannot submit a reimbursement claim if you have progress reports that are past due.
- You cannot submit a reimbursement claim until the costs have been paid.

You will be asked to enter your password.



Reimbursement Claim Process

- Once the claim has been submitted to our office, it goes through a review process.
- The claim will be under "**Submitted/Review Required**" until the review is complete.
- If it is approved, it will be under "**Approved**". OTSO normally processes payments weekly (holiday weeks may alter schedule).
- Once the claim has been processed for payment, it will be under "**Payment Initiated**".
- Payment should be received 2 – 3 weeks after they have been marked "Payment Initiated".
- When the check is sent, the claim will be under "**Payment Complete**". If you receive a paper check, this means it was put in the mail. If you receive EFT, payment should be in your account.

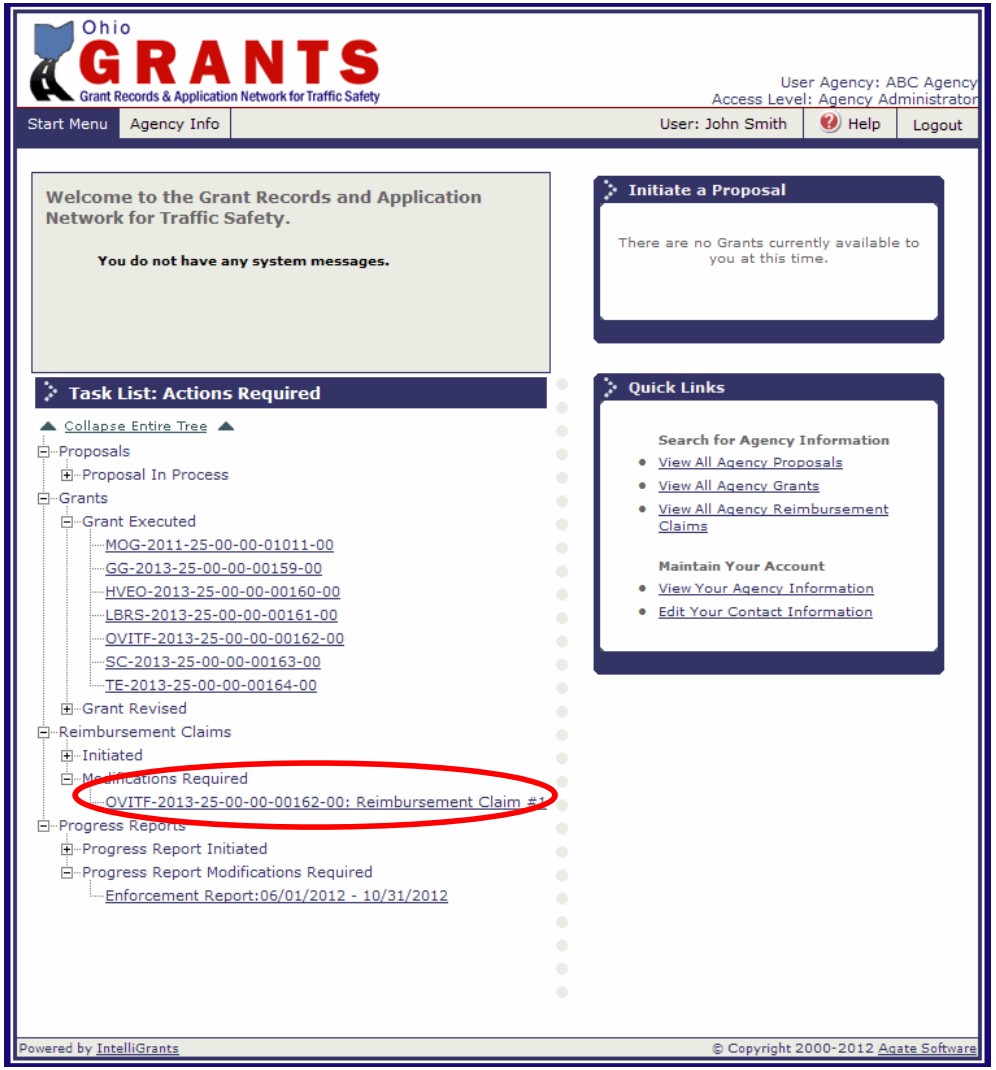


Reimbursement Claim Process

- If your claim is not approved, it will be under “Modifications Required” and you will receive an e-mail letting you know it has been returned.

- Return to the GRANTS System and the claim will be under your task list.

Note: If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.ohio.gov are being blocked as spam.

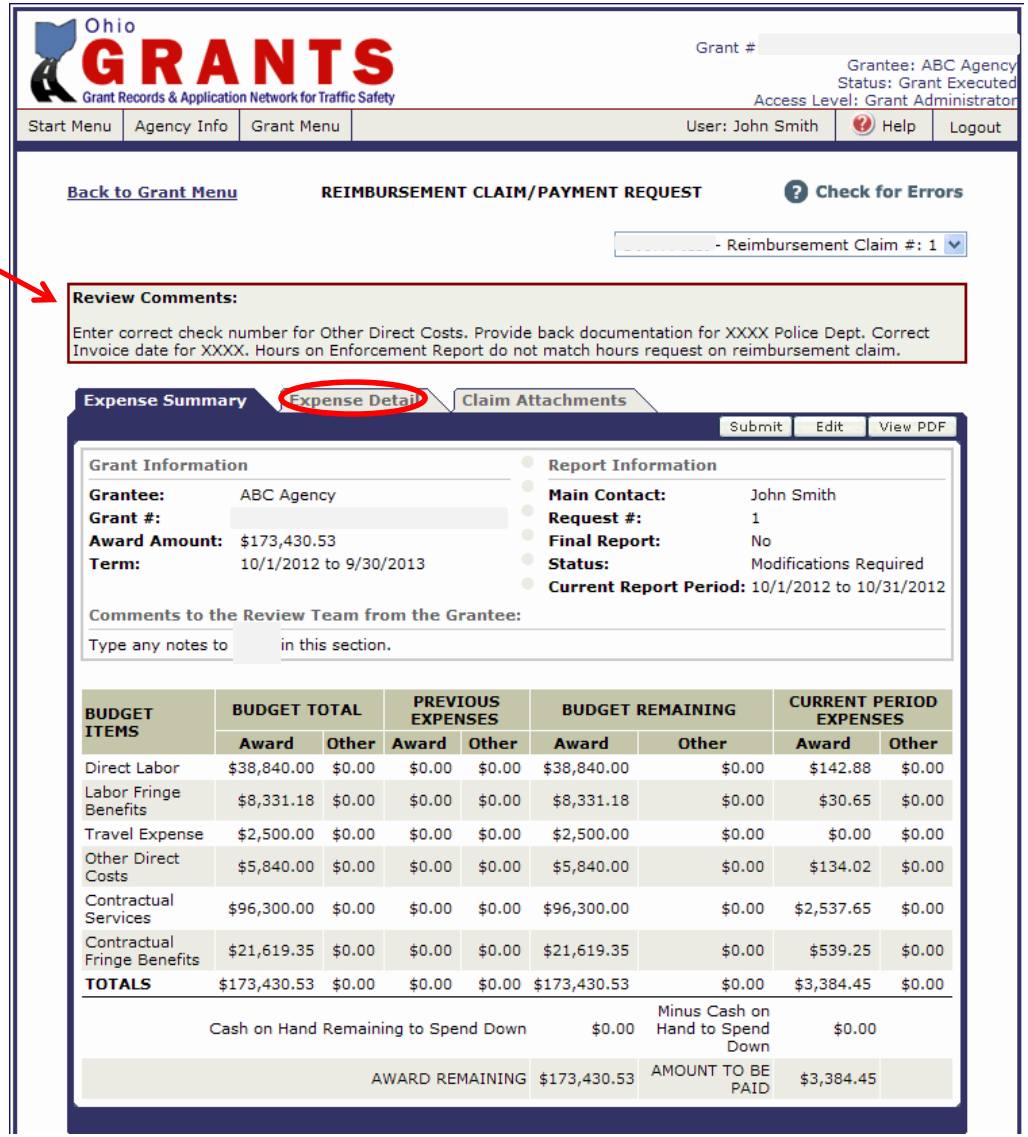


Reimbursement Claim Modifications

Modifications that are required will be listed on the Expense Summary outlined in a red box.

Click on Expense Detail to make the corrections.

Note: There are limited characters available, check with your planner if the comment is not complete.



Ohio GRANTS
Grant Records & Application Network for Traffic Safety

Grant #
Grantee: ABC Agency
Status: Grant Executed
Access Level: Grant Administrator

Start Menu | Agency Info | Grant Menu | User: John Smith | Help | Logout

Back to Grant Menu — REIMBURSEMENT CLAIM/PAYMENT REQUEST — Check for Errors

- Reimbursement Claim #: 1

Review Comments:

Enter correct check number for Other Direct Costs. Provide back documentation for XXXX Police Dept. Correct Invoice date for XXXX. Hours on Enforcement Report do not match hours request on reimbursement claim.

Expense Summary | Expense Detail | Claim Attachments

Submit | Edit | View PDF

Grant Information

Grantee: ABC Agency
Grant #:
Award Amount: $173,430.53
Term: 10/1/2012 to 9/30/2013

Report Information

Main Contact: John Smith
Request #: 1
Final Report: No
Status: Modifications Required
Current Report Period: 10/1/2012 to 10/31/2012

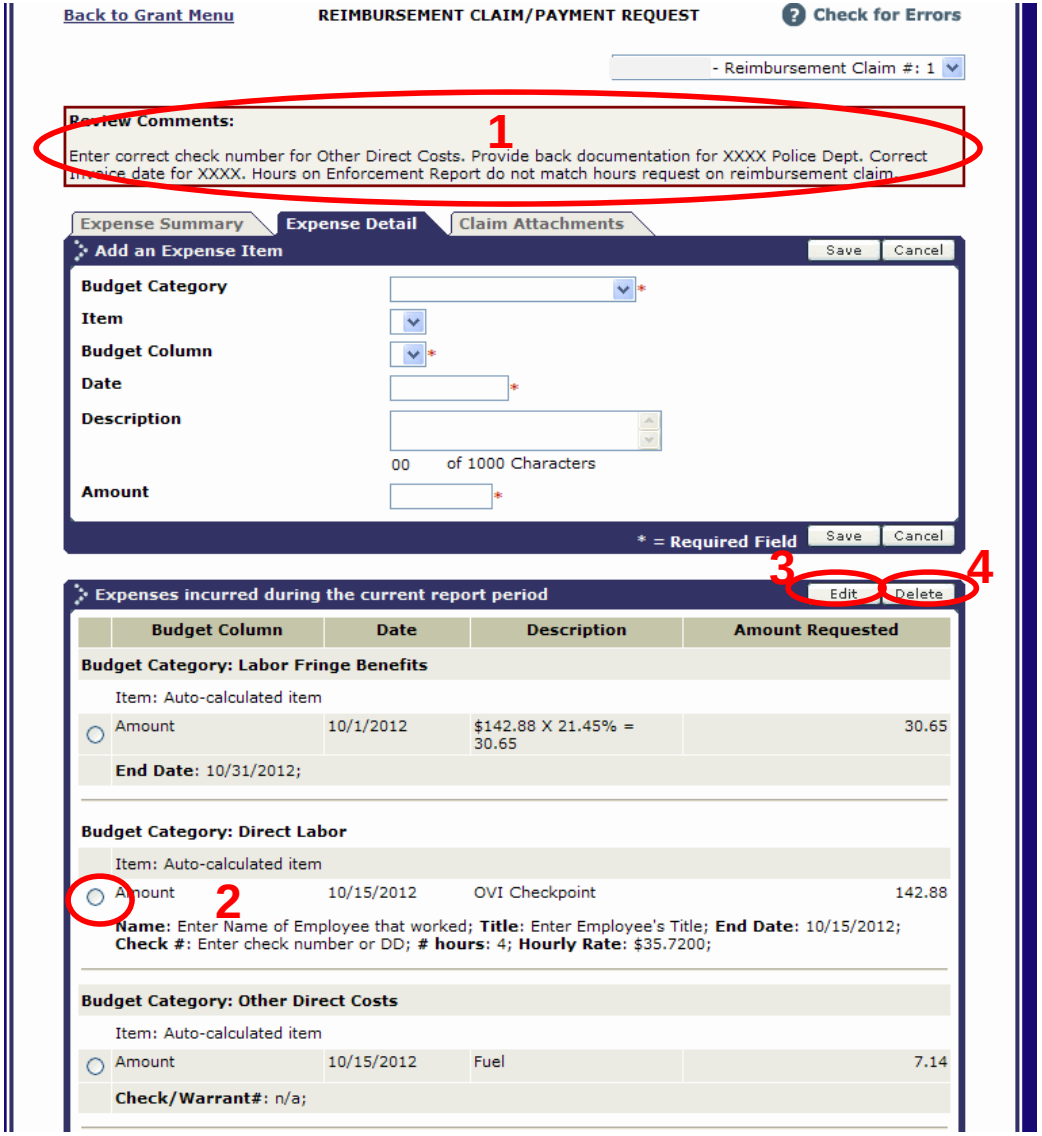
Comments to the Review Team from the Grantee:

Type any notes to in this section.

BUDGET ITEMS	BUDGET TOTAL		PREVIOUS EXPENSES		BUDGET REMAINING		CURRENT PERIOD EXPENSES	
	Award	Other	Award	Other	Award	Other	Award	Other
Direct Labor	$38,840.00	$0.00	$0.00	$0.00	$38,840.00	$0.00	$142.88	$0.00
Labor Fringe Benefits	$8,331.18	$0.00	$0.00	$0.00	$8,331.18	$0.00	$30.65	$0.00
Travel Expense	$2,500.00	$0.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$0.00
Other Direct Costs	$5,840.00	$0.00	$0.00	$0.00	$5,840.00	$0.00	$134.02	$0.00
Contractual Services	$96,300.00	$0.00	$0.00	$0.00	$96,300.00	$0.00	$2,537.65	$0.00
Contractual Fringe Benefits	$21,619.35	$0.00	$0.00	$0.00	$21,619.35	$0.00	$539.25	$0.00
TOTALS	$173,430.53	$0.00	$0.00	$0.00	$173,430.53	$0.00	$3,384.45	$0.00
Cash on Hand Remaining to Spend Down					$0.00	Minus Cash on Hand to Spend Down	$0.00	
AWARD REMAINING					$173,430.53	AMOUNT TO BE PAID	$3,384.45	

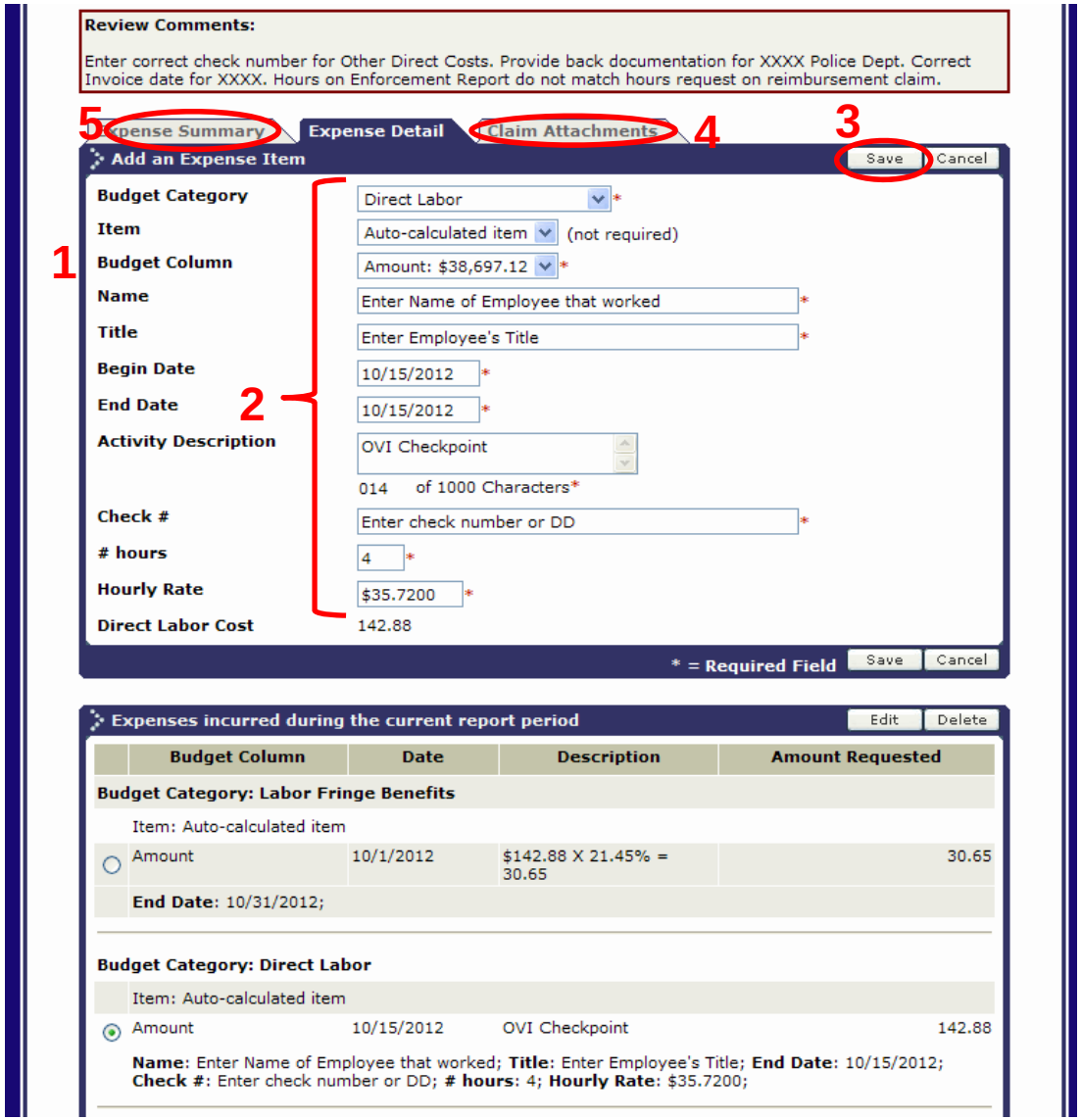
Expense Detail Modifications

1. The Comments are still at the top of the screen for reference.
2. Find the line item you need to correct, select the radio button.
3. To make changes to the entry, click “Edit”.
4. To delete the entry, click “Delete”.



Expense Detail Modifications

1. The top box will populate with the information previously entered.
2. Make the corrections in the top box.
3. Click “Save”.
4. To make corrections on the claim attachment page, click “Claim Attachments” tab.
5. If all corrections are complete, click “Expense Summary”.

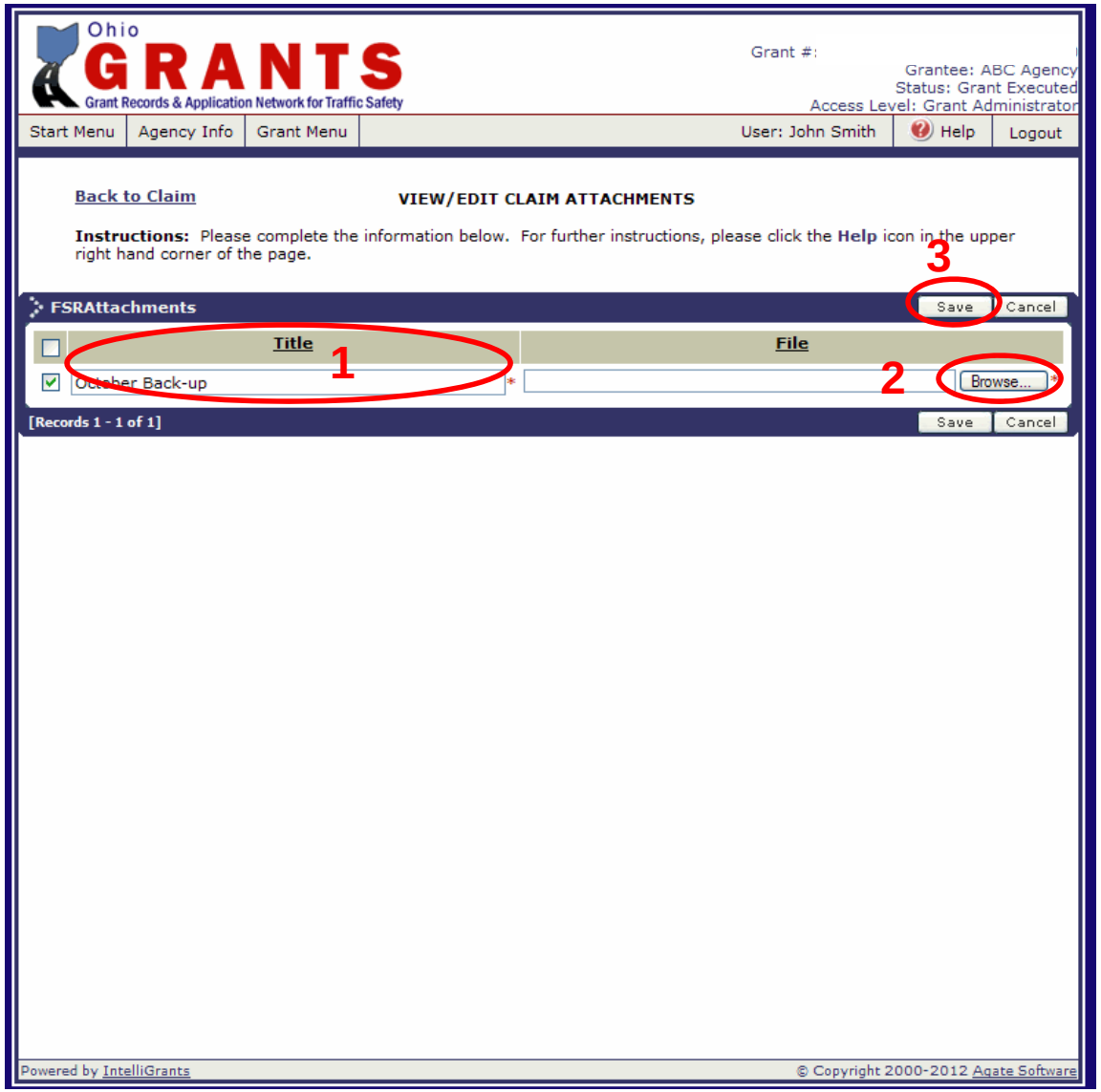


Claim Attachment Modifications

1. To modify the current attachment, check the box next to the attachment.
2. To delete, click “Delete”.
3. To edit, click “Edit”.
4. To add additional files, click “Add”.

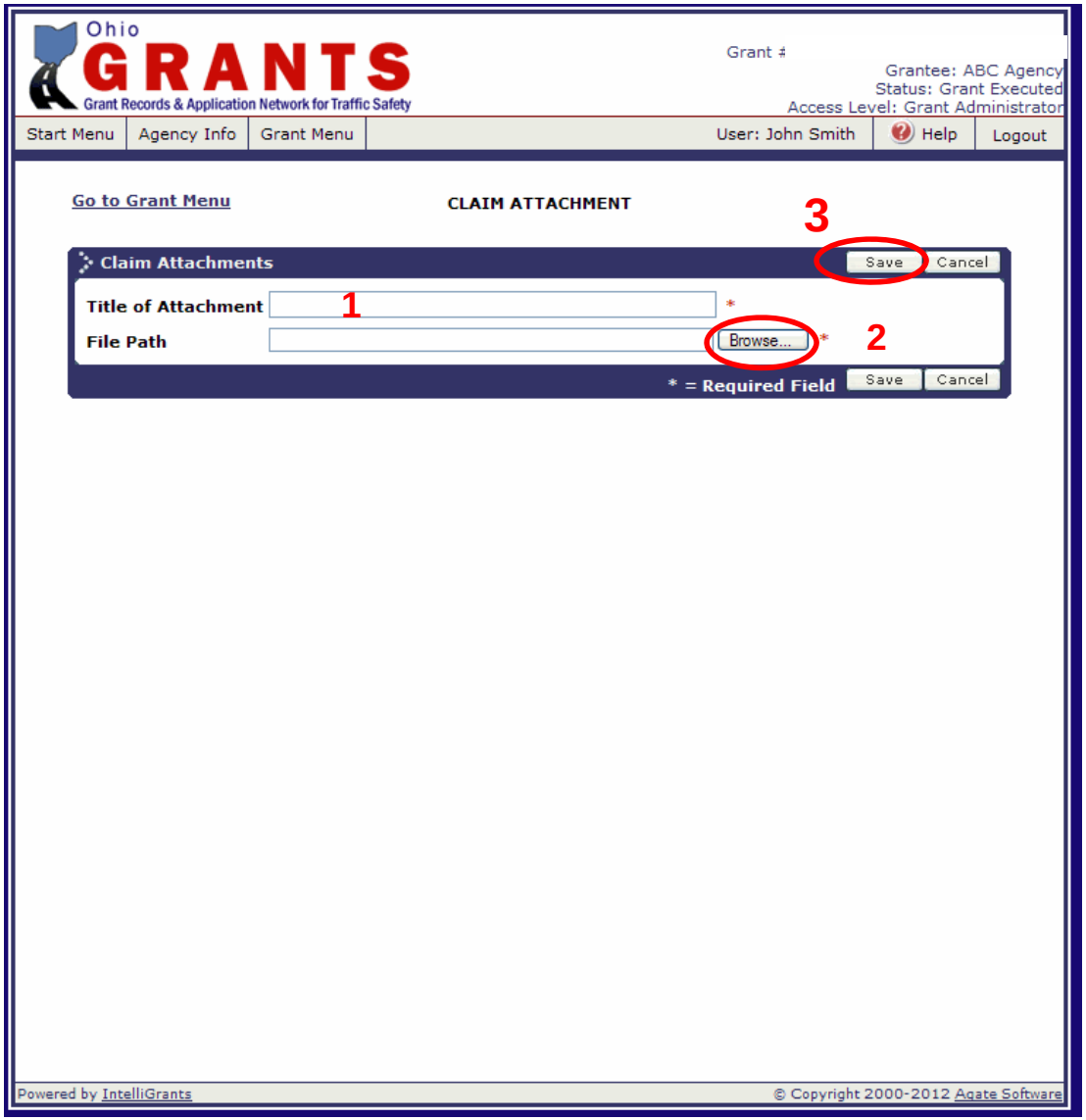
Claim Attachment Edit

1. Change the title, or
2. Attach an updated file by clicking “Browse”.
3. Click “Save”.



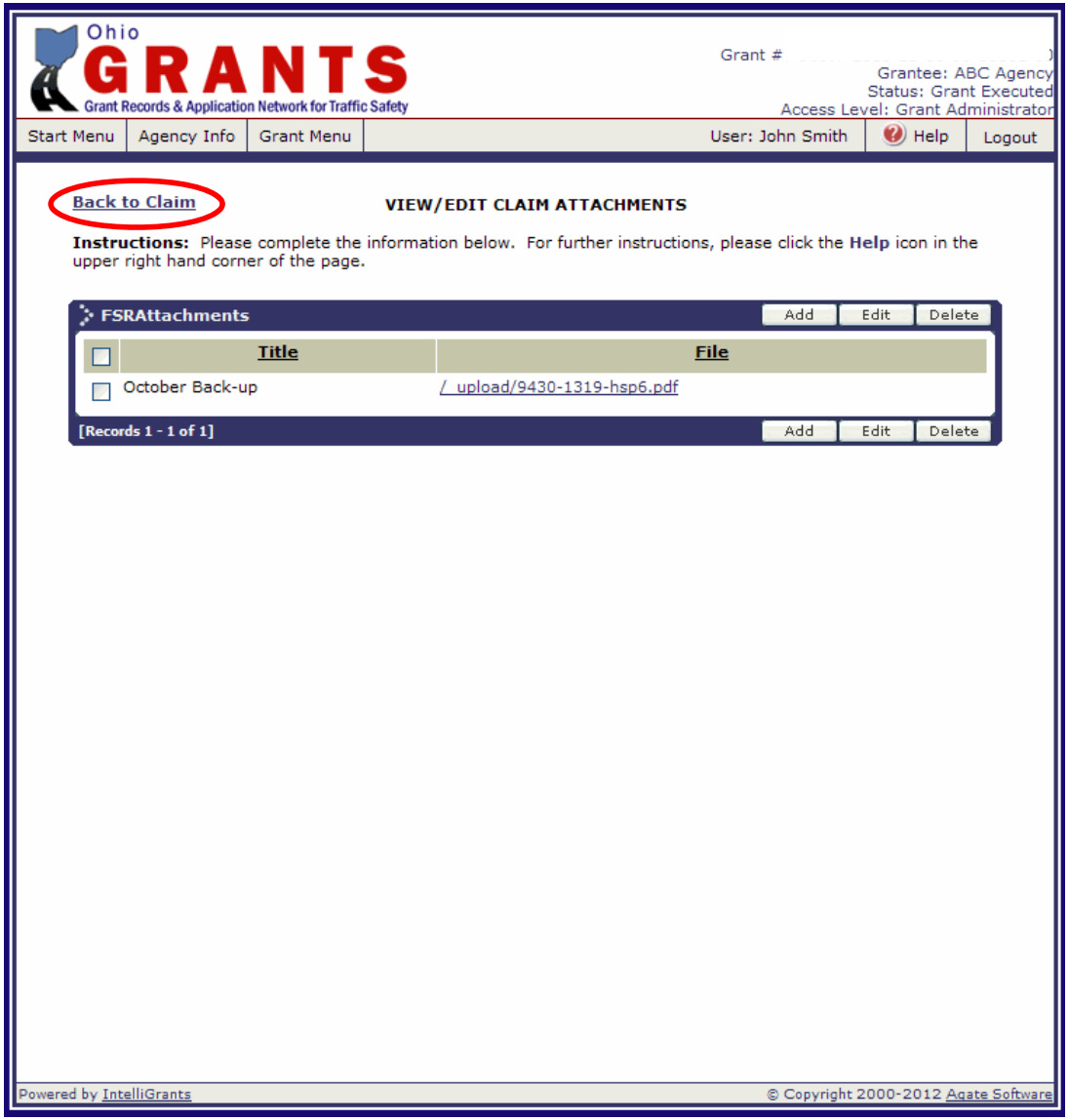
Claim Attachment Add

1. Enter the title.
2. Click “Browse” to locate the file on your computer.
3. Click “Save”.



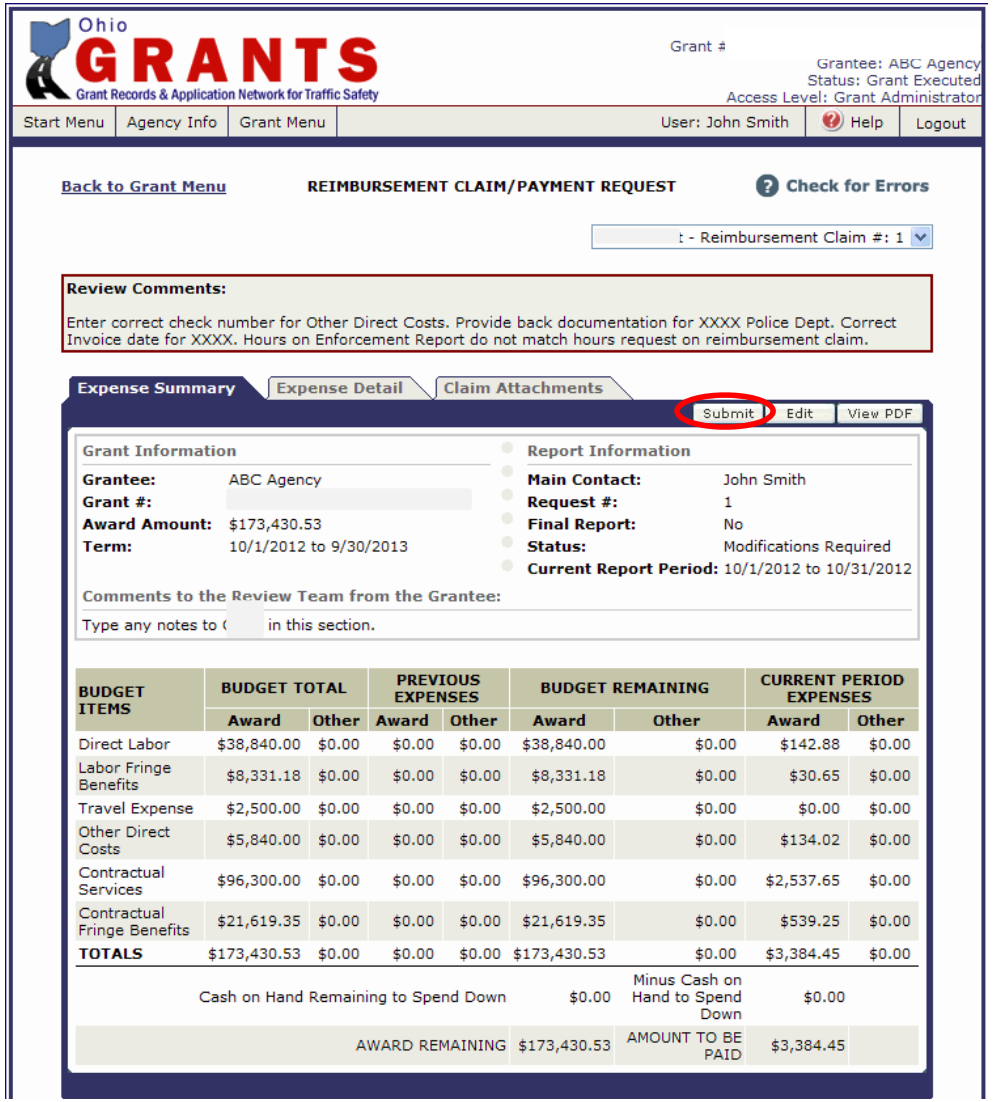
Claim Attachment Modification

When done deleting, editing and adding attachments, click “Back to Claim”.



Reimbursement Claim Modifications

Verify that all the corrections mentioned in the Review Comments have been made. If they have, click "Submit".



Ohio GRANTS
Grant Records & Application Network for Traffic Safety

Grant #
Grantee: ABC Agency
Status: Grant Executed
Access Level: Grant Administrator

Start Menu | Agency Info | Grant Menu | User: John Smith | Help | Logout

Back to Grant Menu — REIMBURSEMENT CLAIM/PAYMENT REQUEST — Check for Errors

: - Reimbursement Claim #: 1

Review Comments:

Enter correct check number for Other Direct Costs. Provide back documentation for XXXX Police Dept. Correct Invoice date for XXXX. Hours on Enforcement Report do not match hours request on reimbursement claim.

Expense Summary | Expense Detail | Claim Attachments

Submit | Edit | View PDF

Grant Information

Grantee: ABC Agency
Grant #:
Award Amount: $173,430.53
Term: 10/1/2012 to 9/30/2013

Report Information

Main Contact: John Smith
Request #: 1
Final Report: No
Status: Modifications Required
Current Report Period: 10/1/2012 to 10/31/2012

Comments to the Review Team from the Grantee:

Type any notes to (in this section.

BUDGET ITEMS	BUDGET TOTAL		PREVIOUS EXPENSES		BUDGET REMAINING		CURRENT PERIOD EXPENSES	
	Award	Other	Award	Other	Award	Other	Award	Other
Direct Labor	$38,840.00	$0.00	$0.00	$0.00	$38,840.00	$0.00	$142.88	$0.00
Labor Fringe Benefits	$8,331.18	$0.00	$0.00	$0.00	$8,331.18	$0.00	$30.65	$0.00
Travel Expense	$2,500.00	$0.00	$0.00	$0.00	$2,500.00	$0.00	$0.00	$0.00
Other Direct Costs	$5,840.00	$0.00	$0.00	$0.00	$5,840.00	$0.00	$134.02	$0.00
Contractual Services	$96,300.00	$0.00	$0.00	$0.00	$96,300.00	$0.00	$2,537.65	$0.00
Contractual Fringe Benefits	$21,619.35	$0.00	$0.00	$0.00	$21,619.35	$0.00	$539.25	$0.00
TOTALS	$173,430.53	$0.00	$0.00	$0.00	$173,430.53	$0.00	$3,384.45	$0.00

Cash on Hand Remaining to Spend Down $0.00 — Minus Cash on Hand to Spend Down $0.00

AWARD REMAINING $173,430.53 — AMOUNT TO BE PAID $3,384.45

Electronic Reimbursement

Reimbursement can be received electronically by going to :

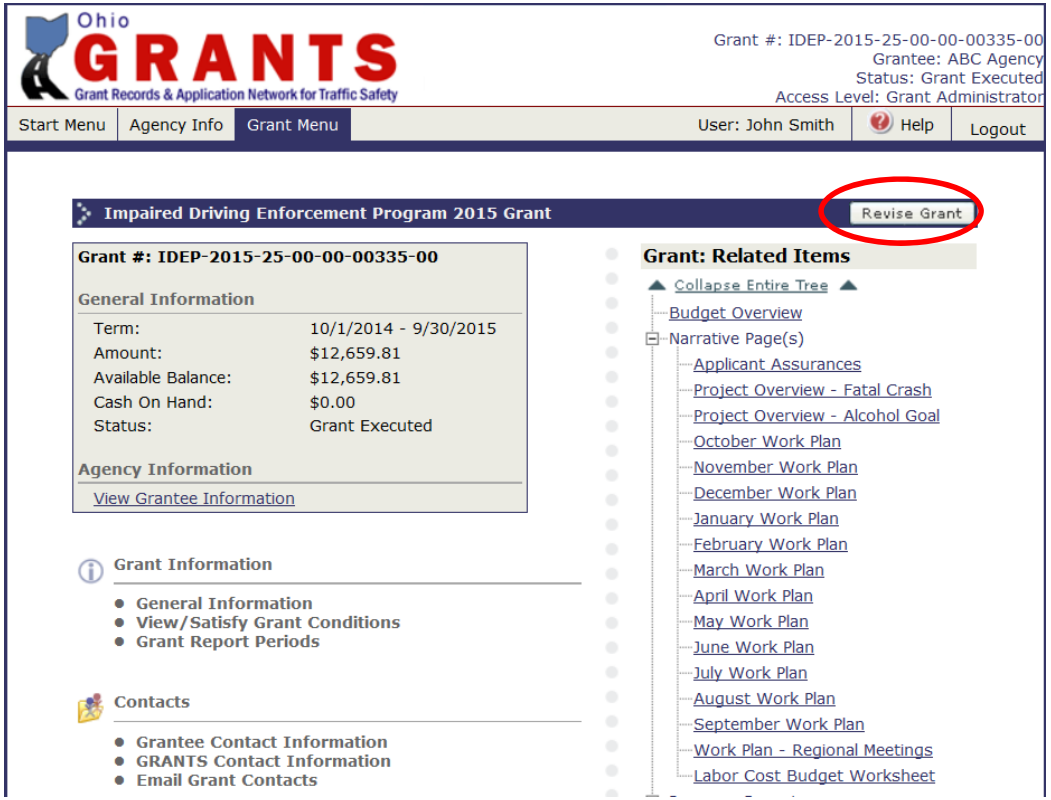
http://ohiosharedservices.ohio.gov/SupplierOperations

Check the box next to Reimbursement Claim Process on the Pre-Activity Form.

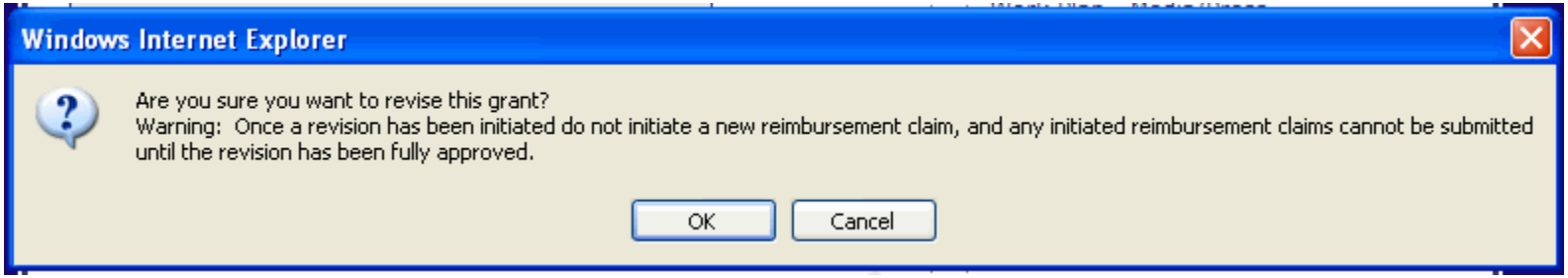
Revision Process

All grant revisions must be submitted by September 1, 2017.

To initiate a revision, click “Revise Grant”.



Grant Revision



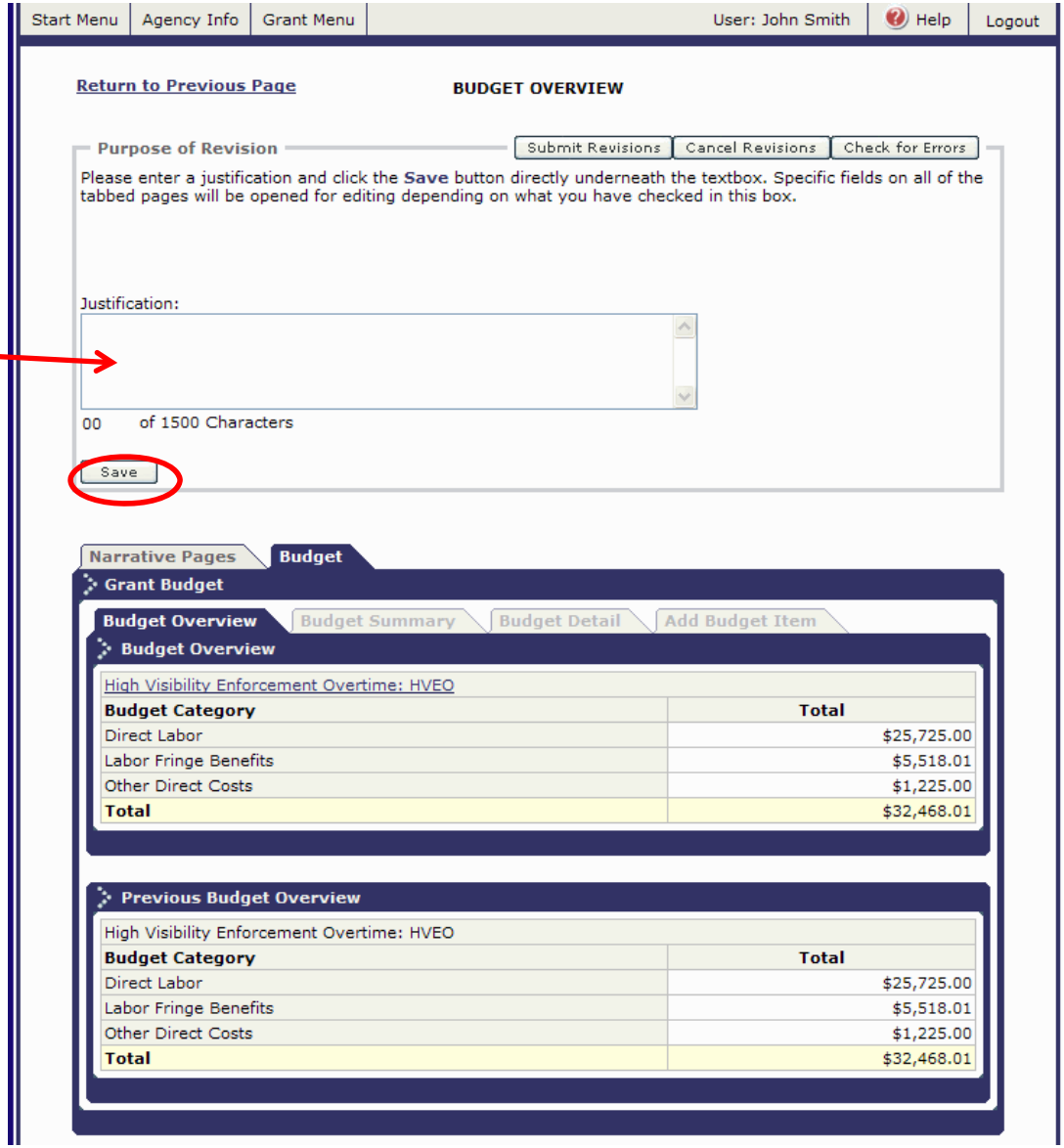
Once you click “Revise Grant”, you will receive this warning message:

Once a revision has been initiated do not initiate a new reimbursement claim, and any initiated reimbursement claims including modifications cannot be submitted until the revision has been fully approved.

Grant Revision

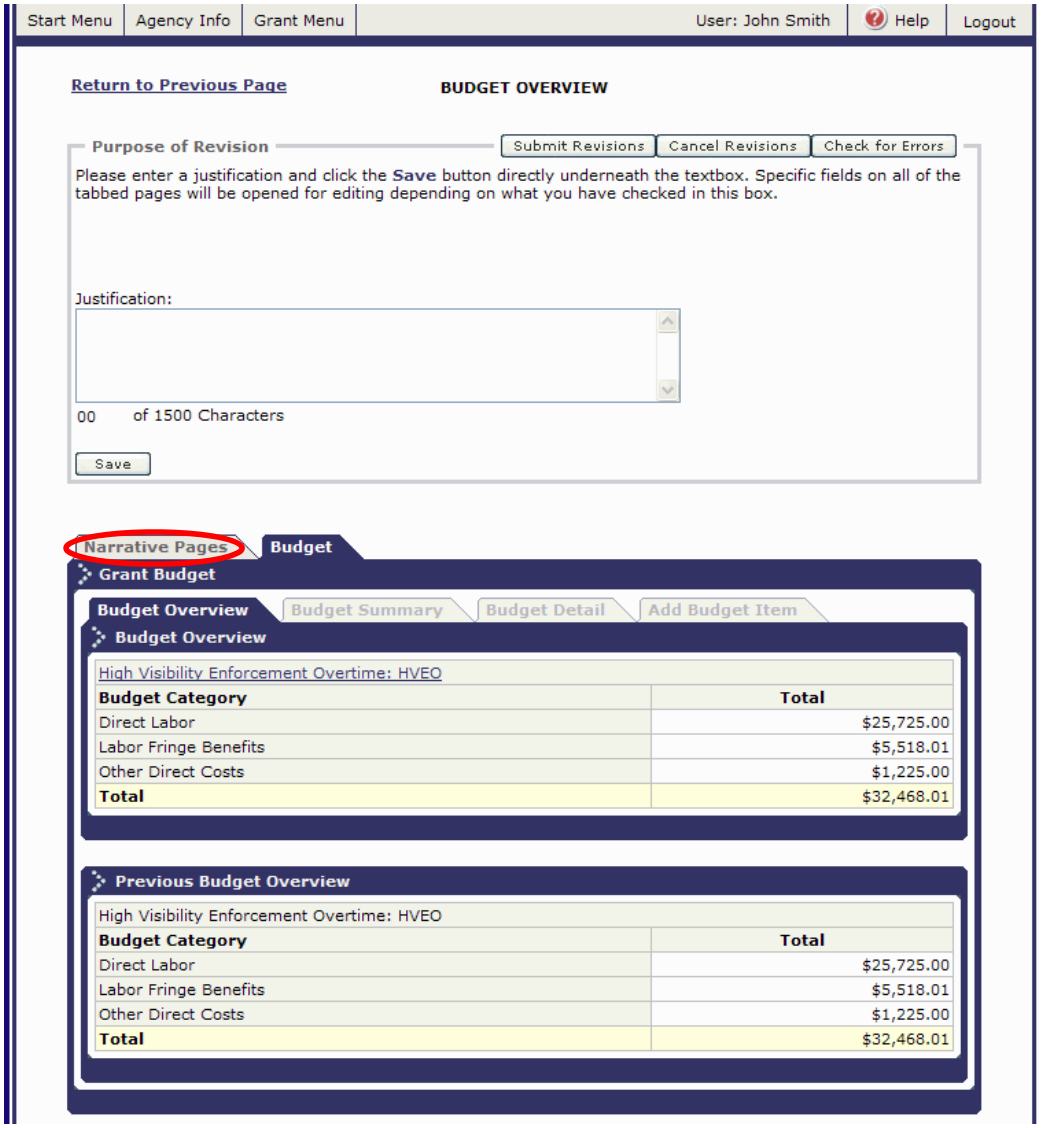
The Budget Overview Page has the Justification. All changes you are making to the grant need to be listed in this box. Ex: Moved 20 hours from Christmas to St. Patrick's Day. Moved 10 hours from November Non-Blitz to February Non-Blitz.

If you need to wait until you have made your changes to fill this in, make sure you return to this page when you enter the justification. (It is the only time the "Save" button will appear).



Narrative Page Revisions

To make changes to any Narrative Page (Applicant Assurances, Goals, Work Plans, Labor Cost Budget Worksheet), click "Narrative Pages" tab.

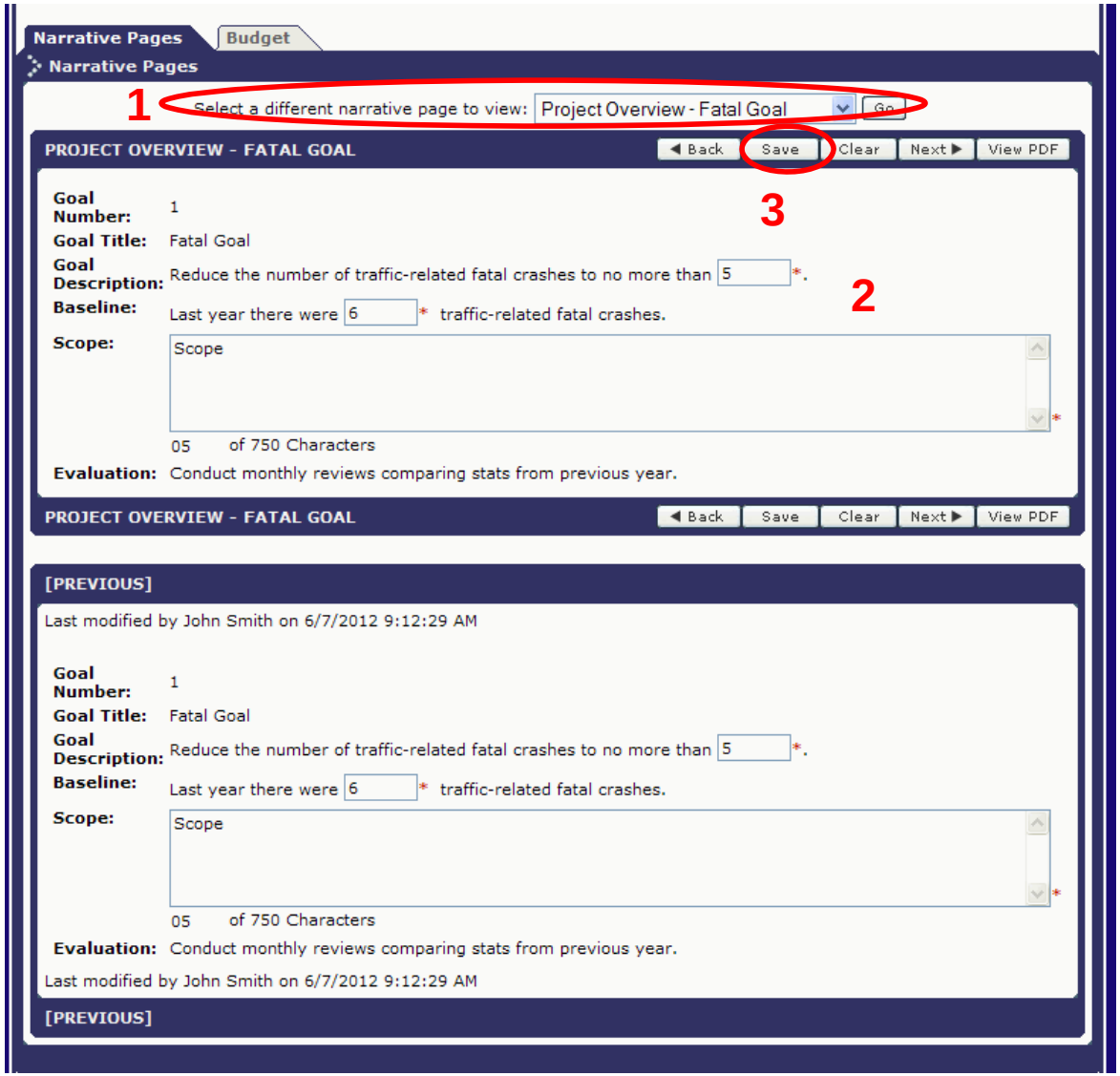


Narrative Page Revisions

1. Select the page you want to revise in the drop down and click “go”.

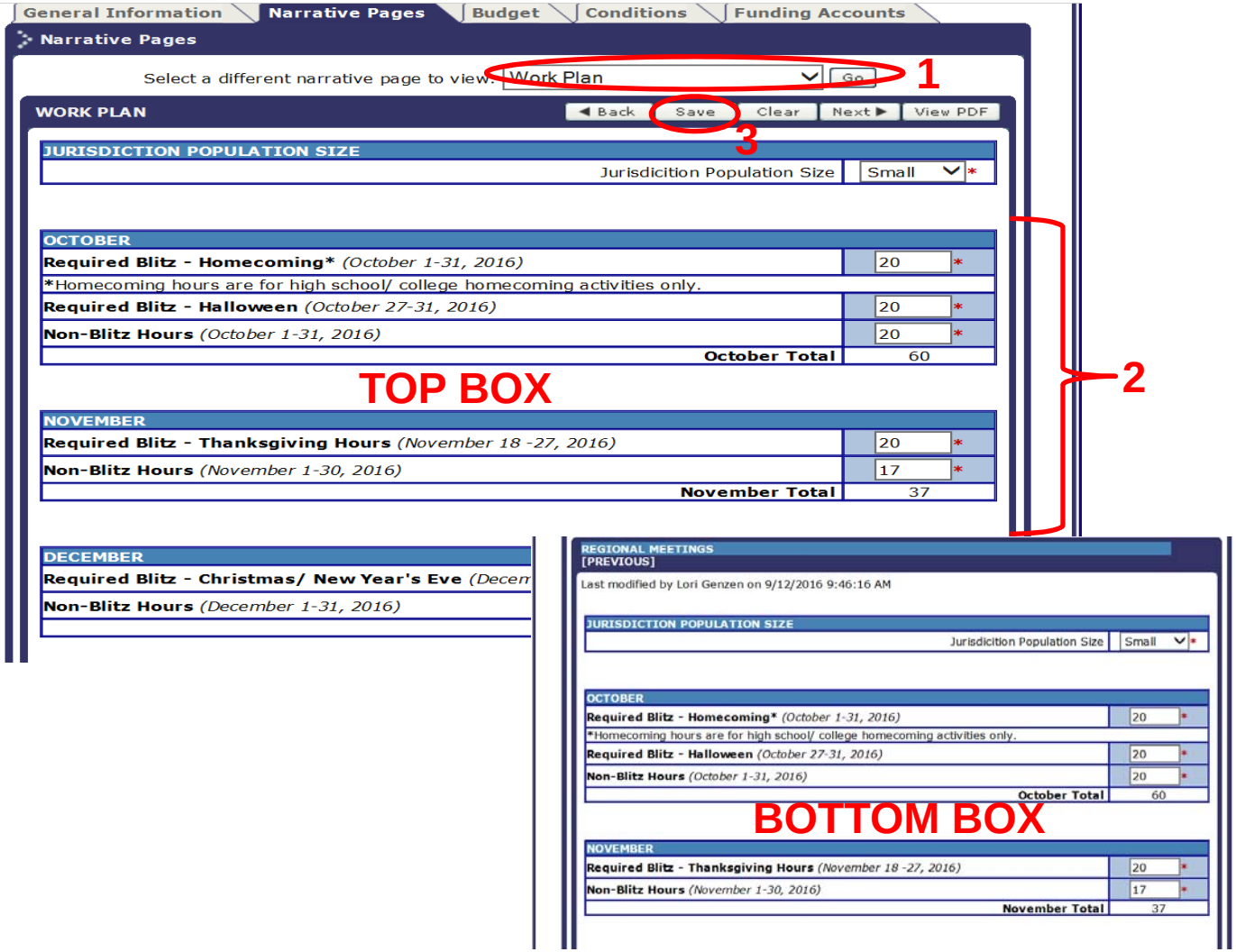
Once it pulls up the information from the grant, you will see the information in two boxes. The bottom box is what was in the grant previously.

2. Make changes in the top box.
3. Click “Save”.



Narrative Page Revisions

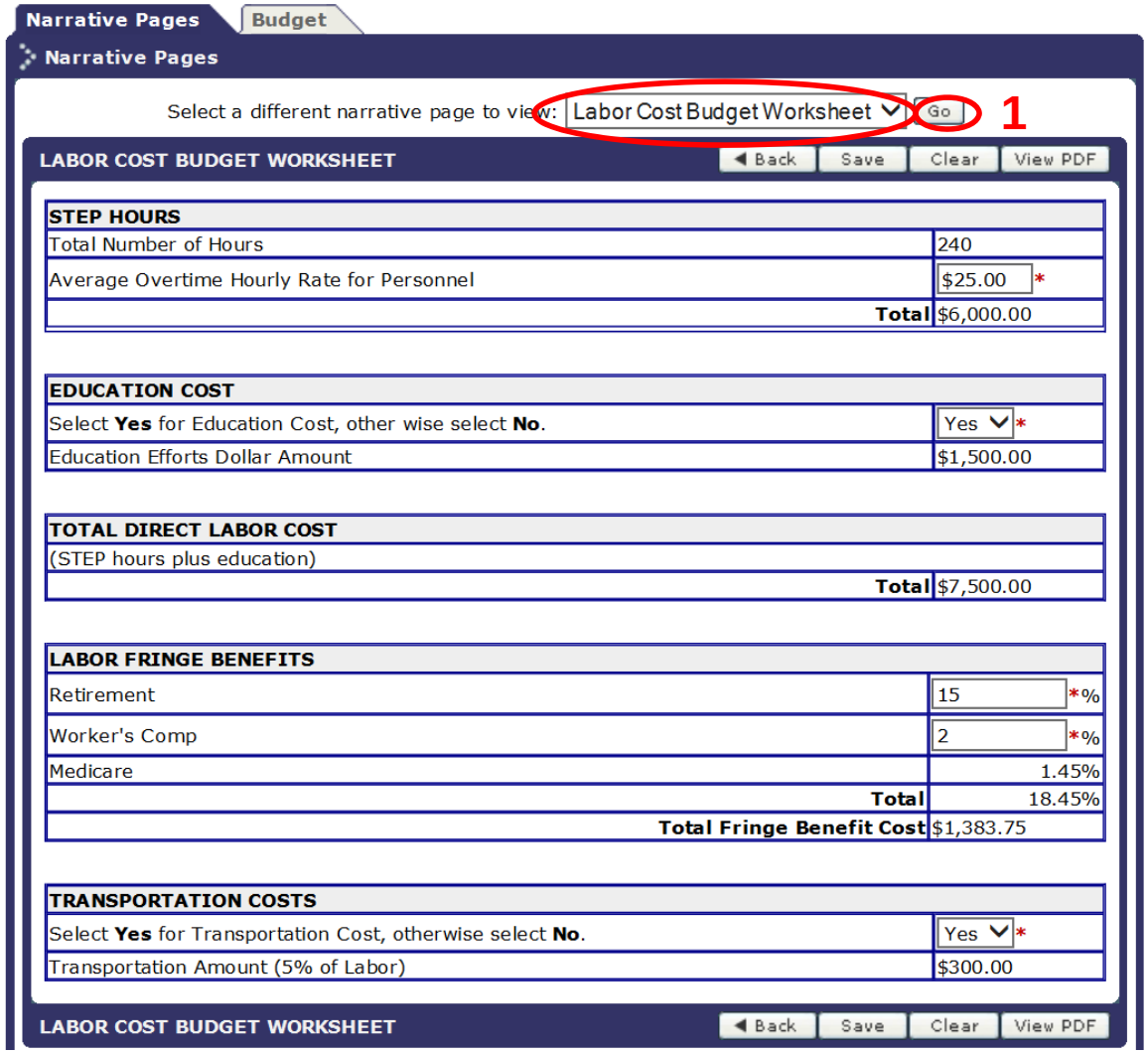
1. To select another Narrative Page, choose the name and click “go”.
2. Again, make changes in the top box.
3. Click “Save”.



Narrative Page Revisions

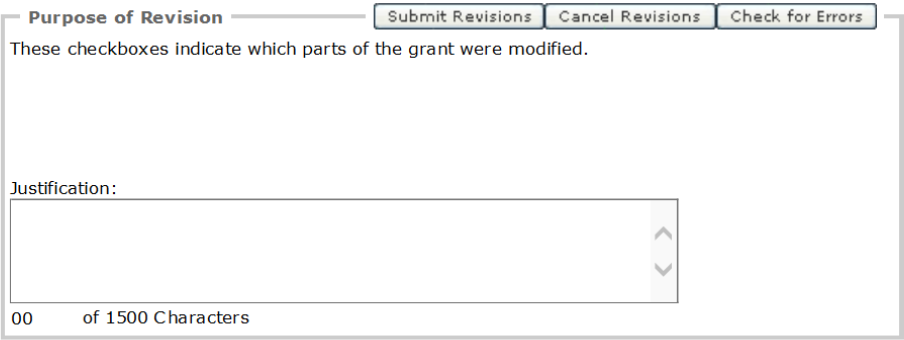
If you have made changes to any work plan pages, you will need to re-save the Labor Cost Budget Worksheet.

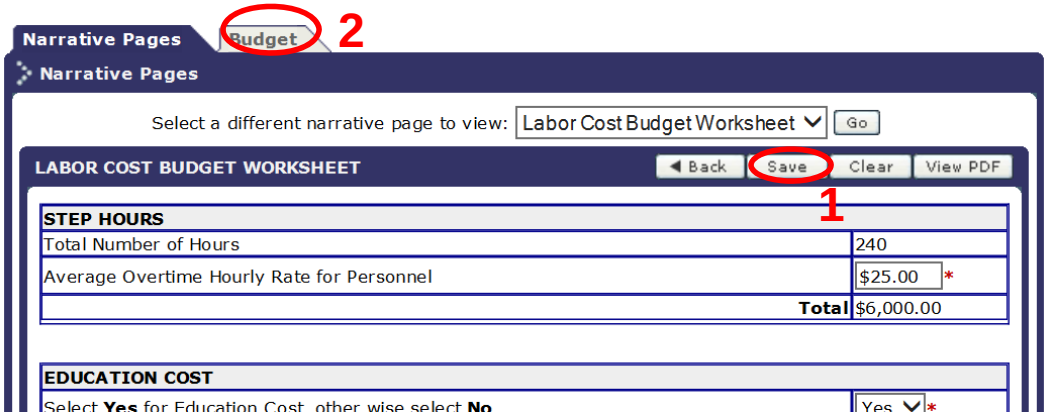
1. Select Direct Labor Worksheet in the drop down, click “go”.



Narrative Page Revisions

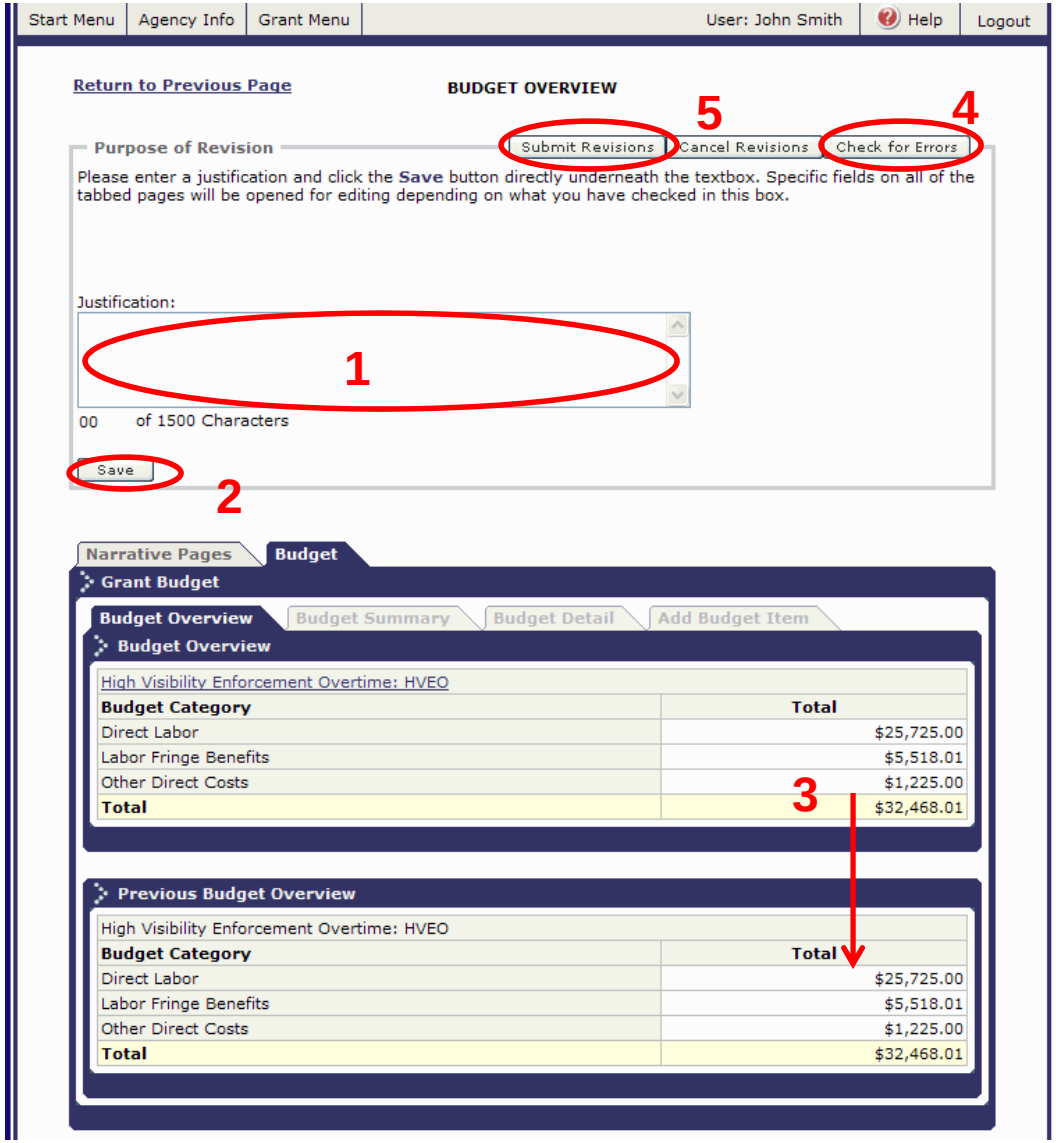
1. Once the page refreshes, click “Save”.
2. Click the “Budget” tab.





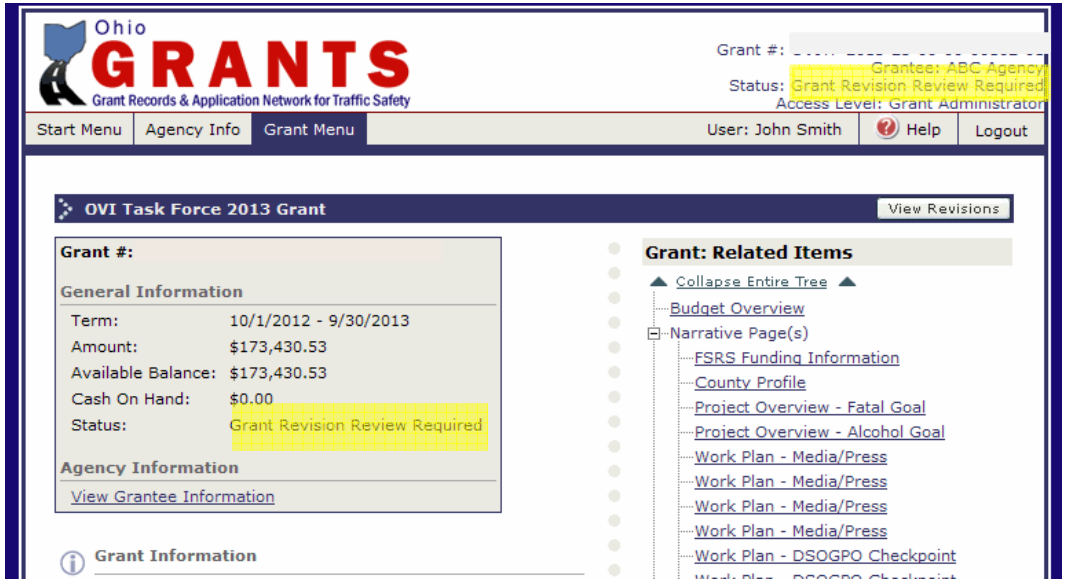
Grant Revision

1. Complete the Justification Box, if not already completed.
2. Click “Save”.
3. Compare the Budget Overview to the Previous Budget Overview to ensure that the budget has not increased (unless you have prior approval to increase your budget) or decreased (unless you wish to decrease the budget).
4. Click “Check for Errors” to see if there are any system errors to fix prior to submitting.
5. Click “Submit Revisions”.



Grant Revisions

- Once the revision has been submitted to our office, it goes through a review process.
- The grant will be under "**Grant Revision Review Required**" until the review is complete.
- If it is approved, the grant status will update to "Grant Revised".

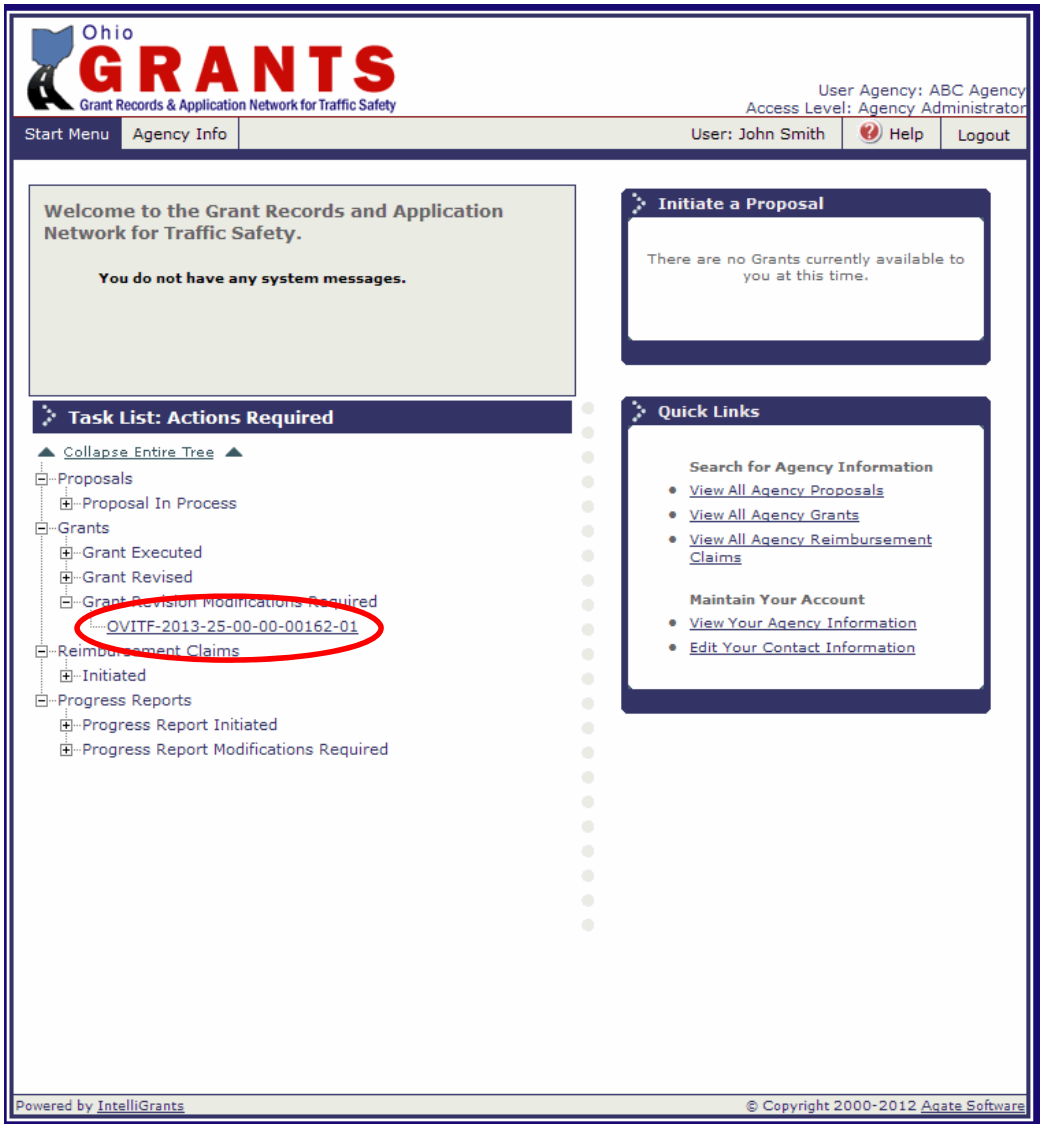


Grant Revision Modifications Required

If your revision is not approved, it will be under “Grant Revision Modifications Required” and you will receive an e-mail letting you know it has been returned.

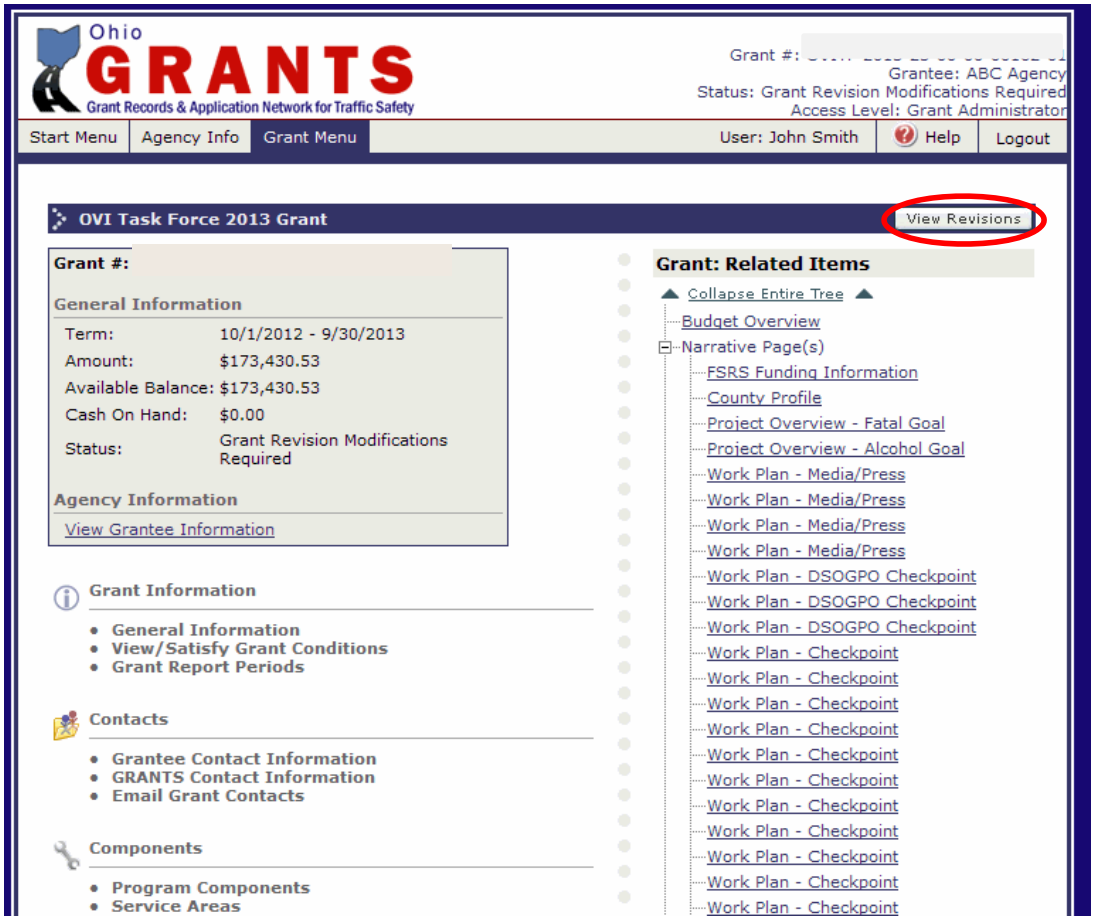
Return to the GRANTS System and the claim will be under your task list. Click on the link.

Note: If you do not receive the email, check your email address in the GRANTS System (update if needed) or check with your agency IT Administrator to see if our system generated emails from otso@dps.ohio.gov are being blocked as spam.



Grant Revision Modifications Required

From the Grant Menu, click on "View Revisions".

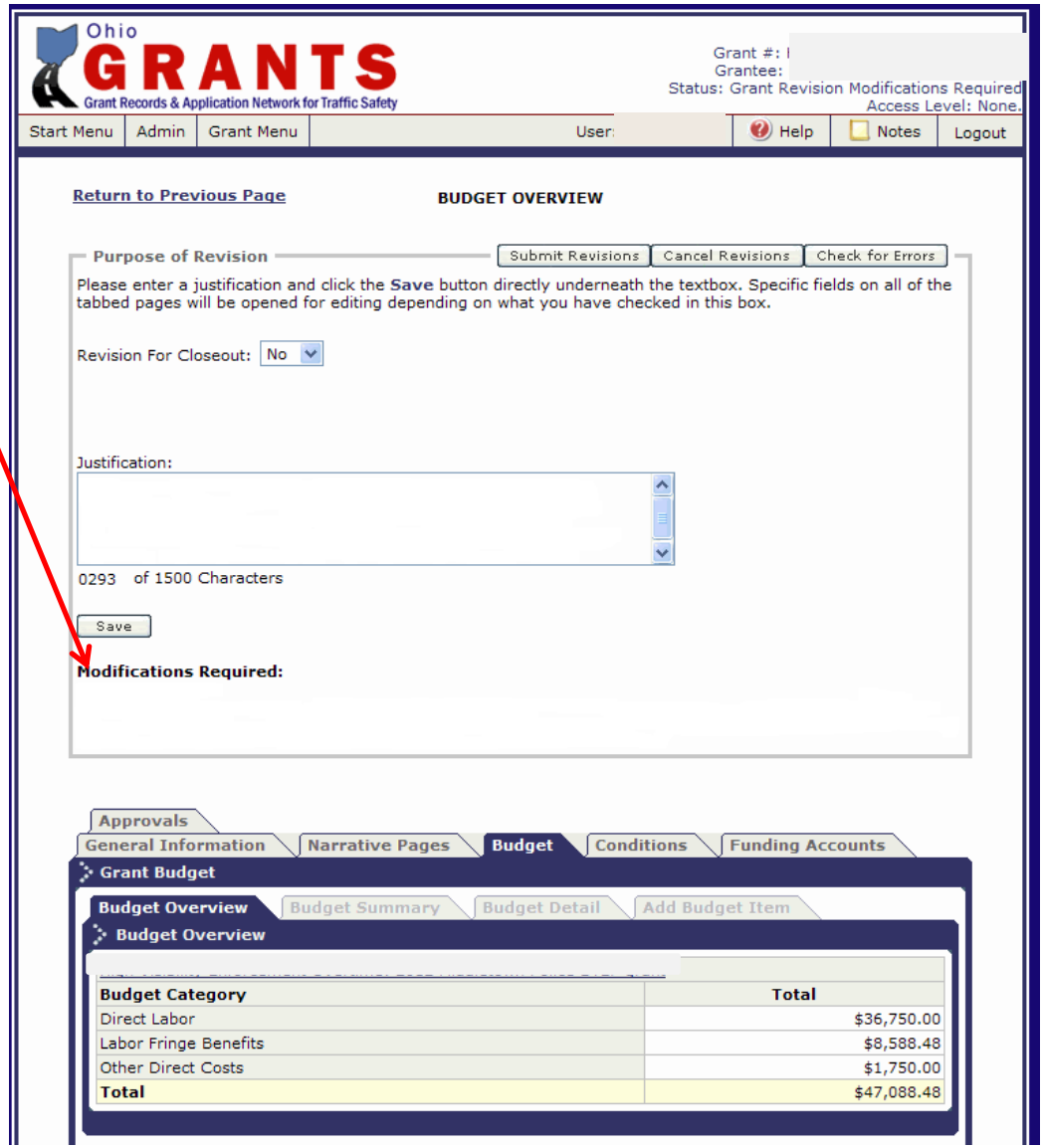


Grant Revision Modifications Required

Modifications that are required will be listed on the Budget Overview under Modifications Required.

Follow the steps on slides 96 -104 to make the required changes and re-submit the revision.

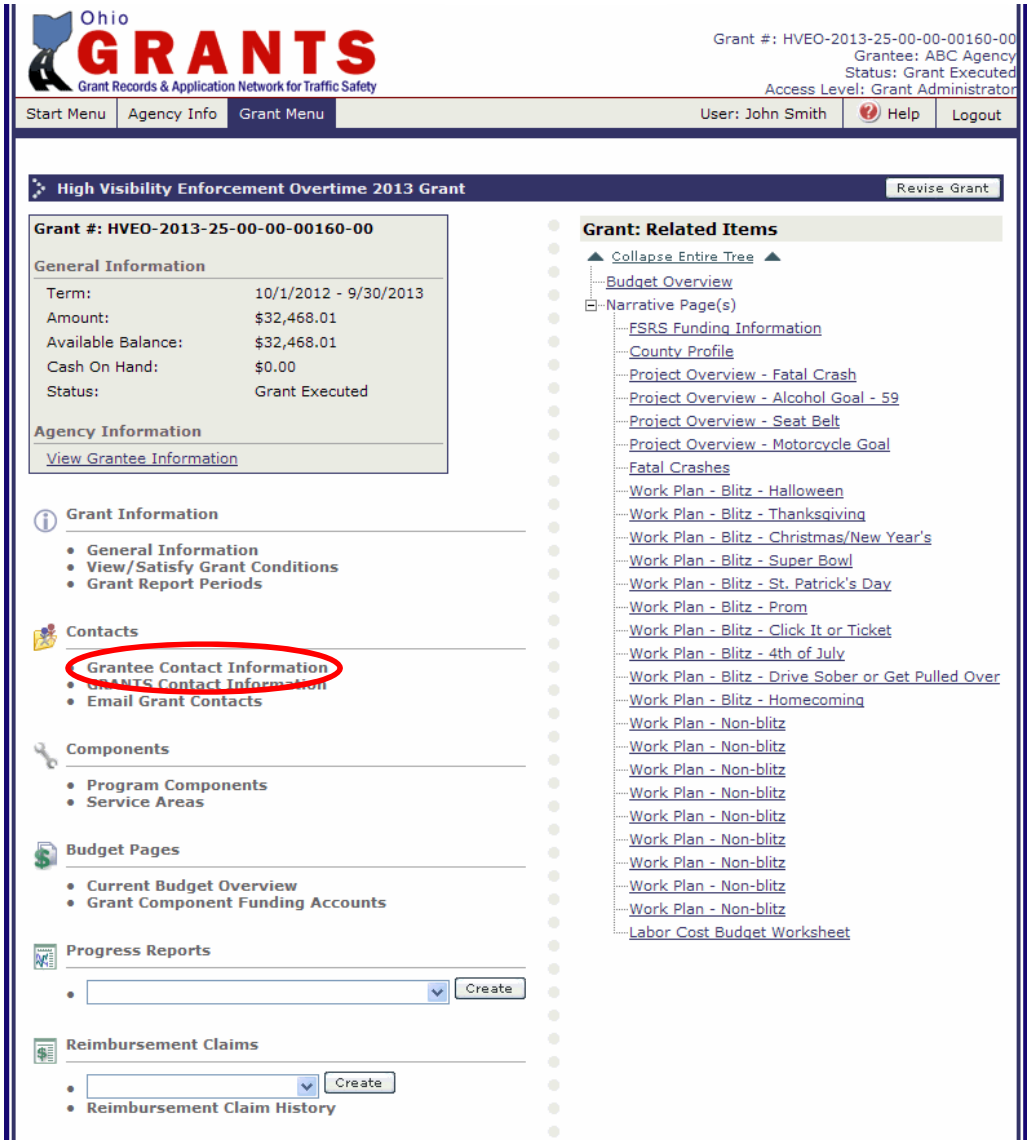
Check the box next to Revision Process on the Pre-Activity form.



Controlling Access to Grant

To change/add personnel to the grant:

Click “Grantee Contact Information”.

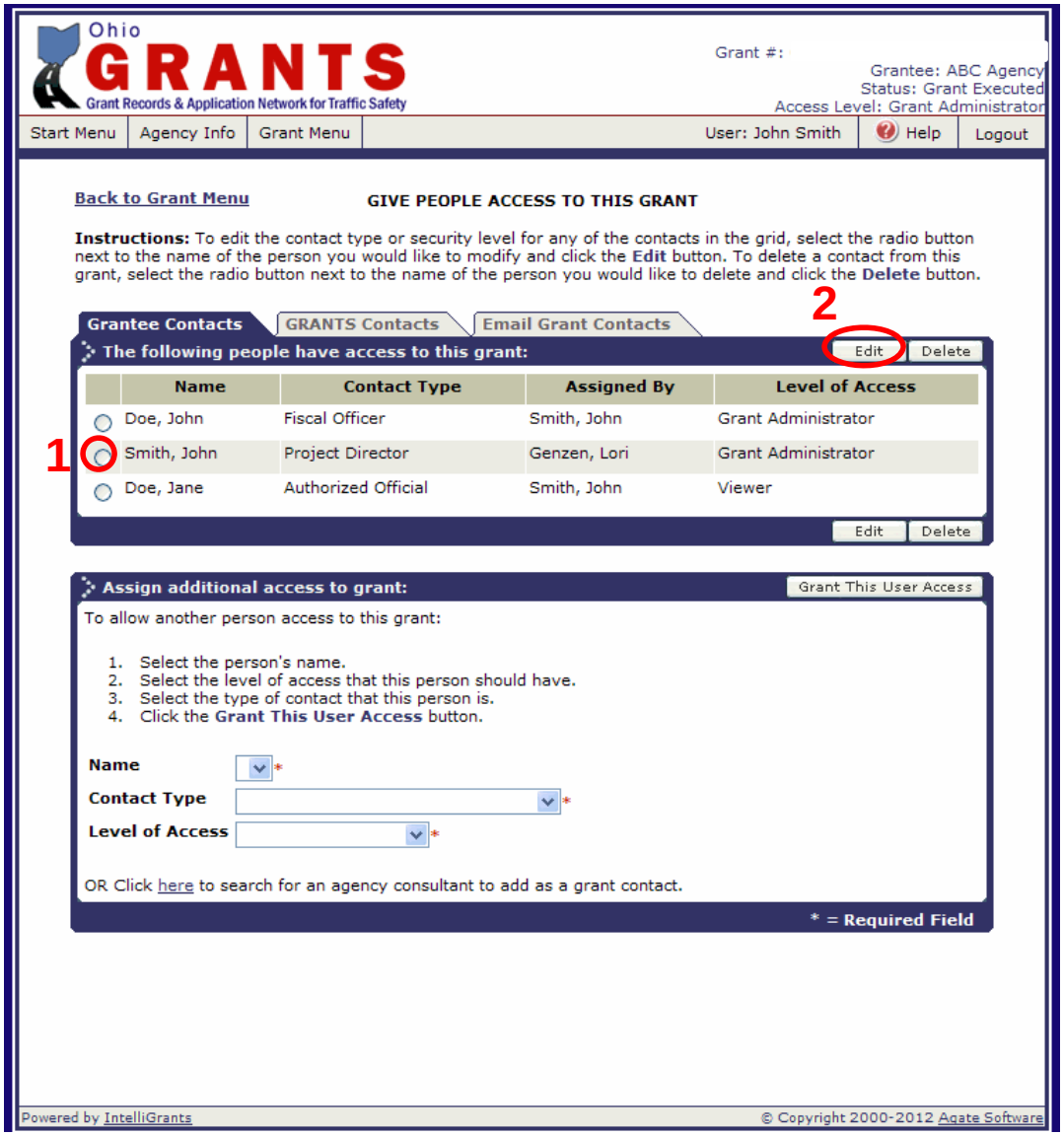


Controlling Access to Grant

The people who were added to the proposal are automatically transferred to the grant.

If you need to make changes to the existing contact type or level of access:

1. Click the radio button next to the name.
2. Click the “Edit” button and make the necessary changes.



Controlling Access to Grant

1. Make the change to either the Contact Type or the Level of Access.

Contact Types

Authorizing Official – The authorizing official is usually the head of an organization/agency. This individual must possess or have the ability to obtain the legislative authority to enter into an agreement with OTSO.

Project Director – The project director is designated as the agency's liaison with OTSO by the authorizing official. This individual will oversee the daily activities of the grant and ensure that the scope of work, evaluation and work plans are completed as proposed. This individual will also serve as the primary contact person for the grant.

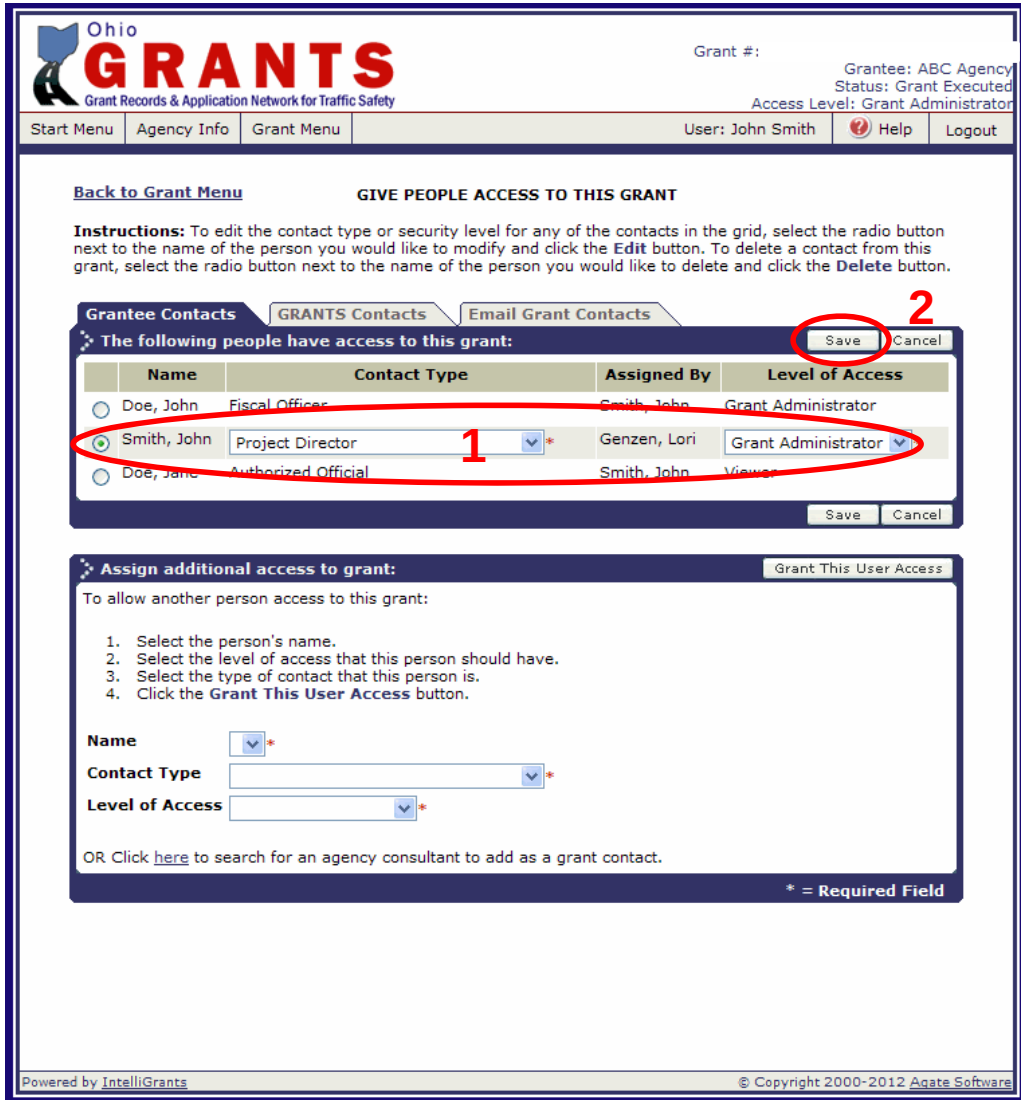
Fiscal Officer – The fiscal officer is responsible for the fiscal activities of the agency. This individual is responsible for overseeing the grant's budget, as well as submitting properly prepared claims for reimbursement to OTSO.

Level of Access

Grant Administrator – has access to make changes, submit reports and reimbursement claims.

Viewer – Can only view the grant.

2. Click "Save".



Controlling Access to Grant

If you need to delete an existing contact from the grant:

1. Click the radio button next to the name.
2. Click the “Delete” button.

This will only remove the person’s access to this grant. It does not remove their access to the GRANTS System. See Slide 116 if you need to de-activate their account.

Controlling Access to Grant

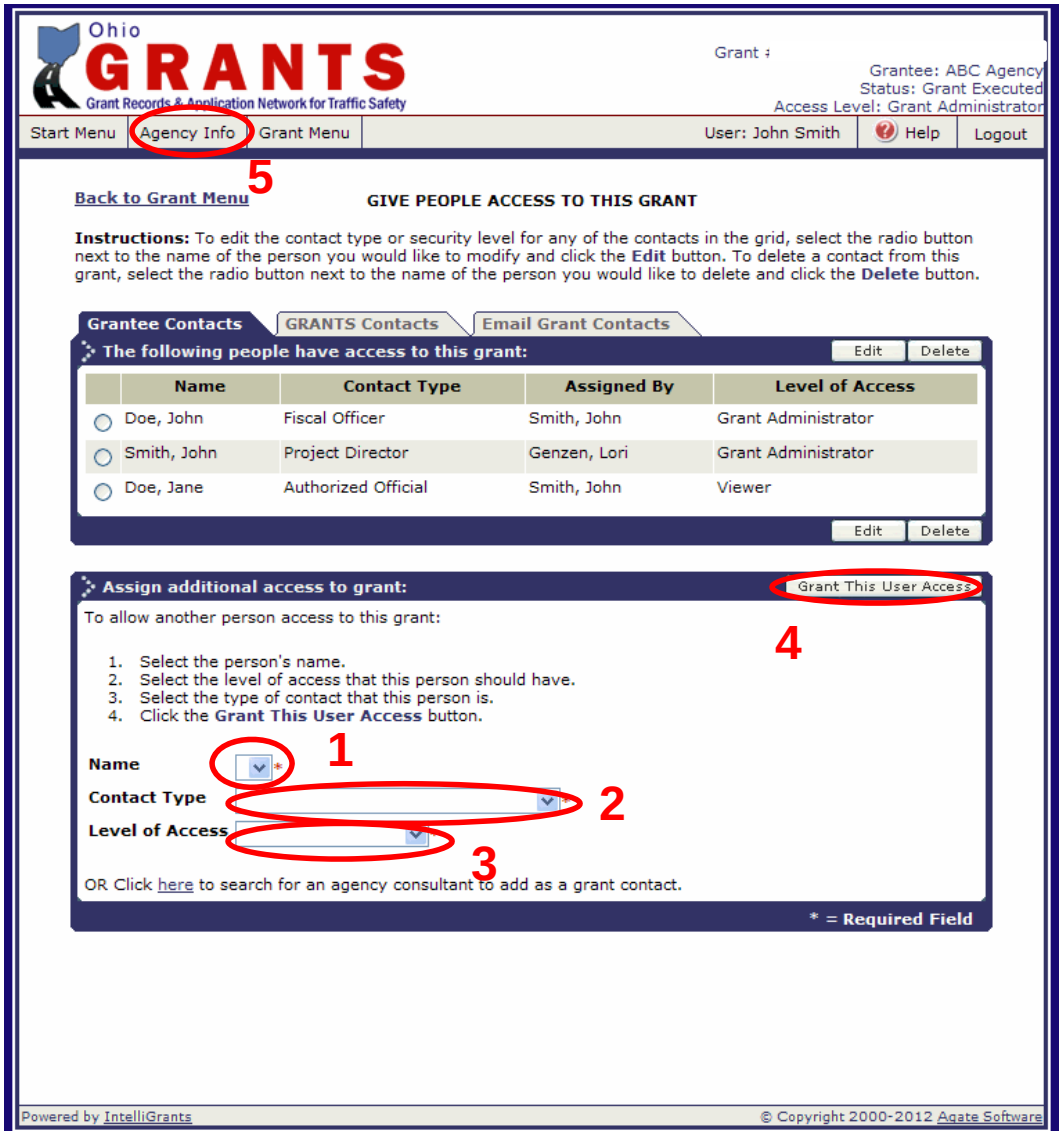
To add additional people:

1. Select the person's name.
2. Select the Contact Type (Authorized Official, Fiscal Officer, etc.)
3. Select level of access.
4. Click the "Grant This User Access" button.

Repeat until all necessary people have been added.

If the person that needs to be added, is not listed in the drop down for Step 1:

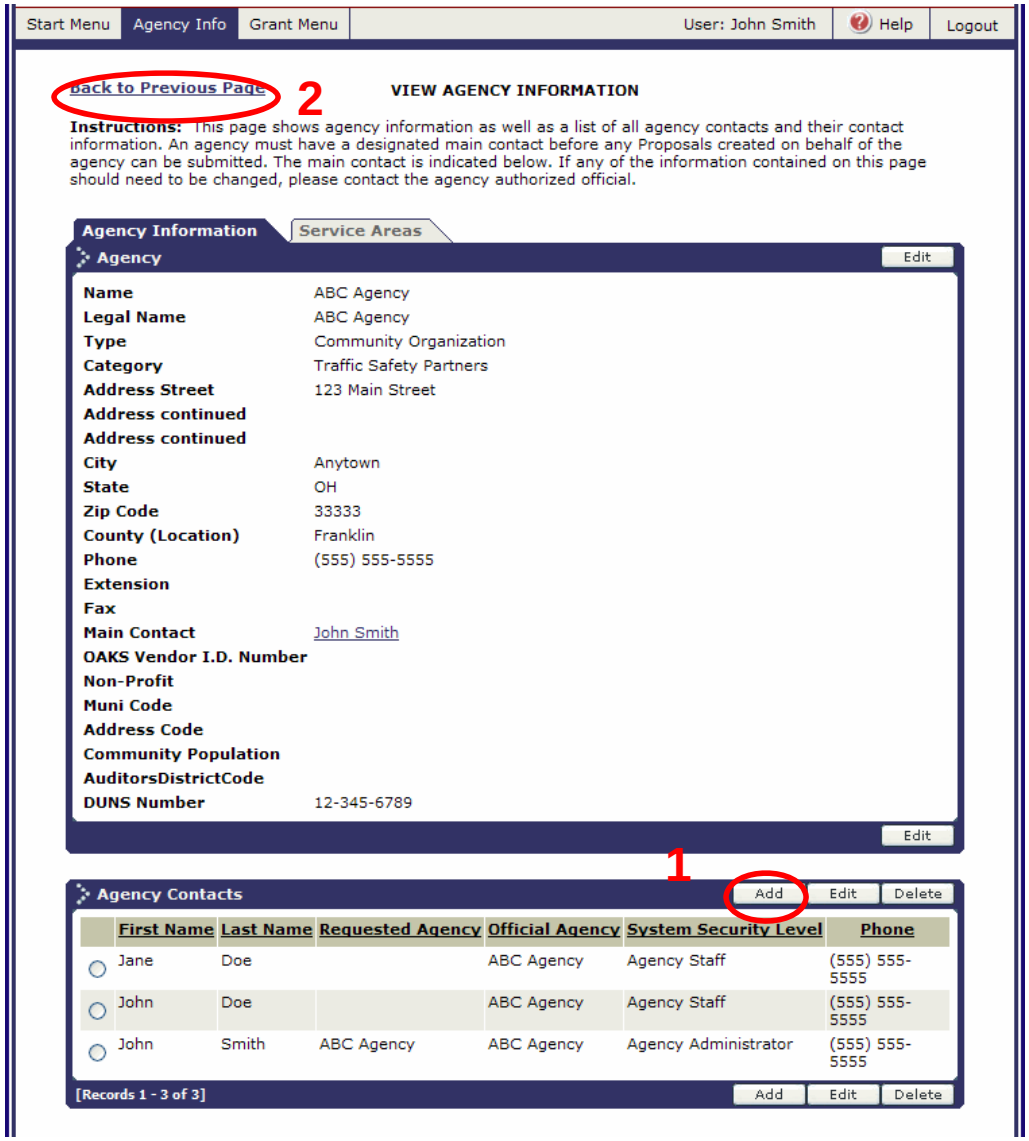
5. Click "Agency Info".



Controlling Access to Grant

To add a new user:

1. If you are the Agency Administrator, click the “Add” button and complete the user information. If you are not the Agency Administrator, have the Agency Administrator complete this step. Then proceed to Step 2.
2. Once everyone that you need to add to the grant is added, click on “Back to Previous Page”.



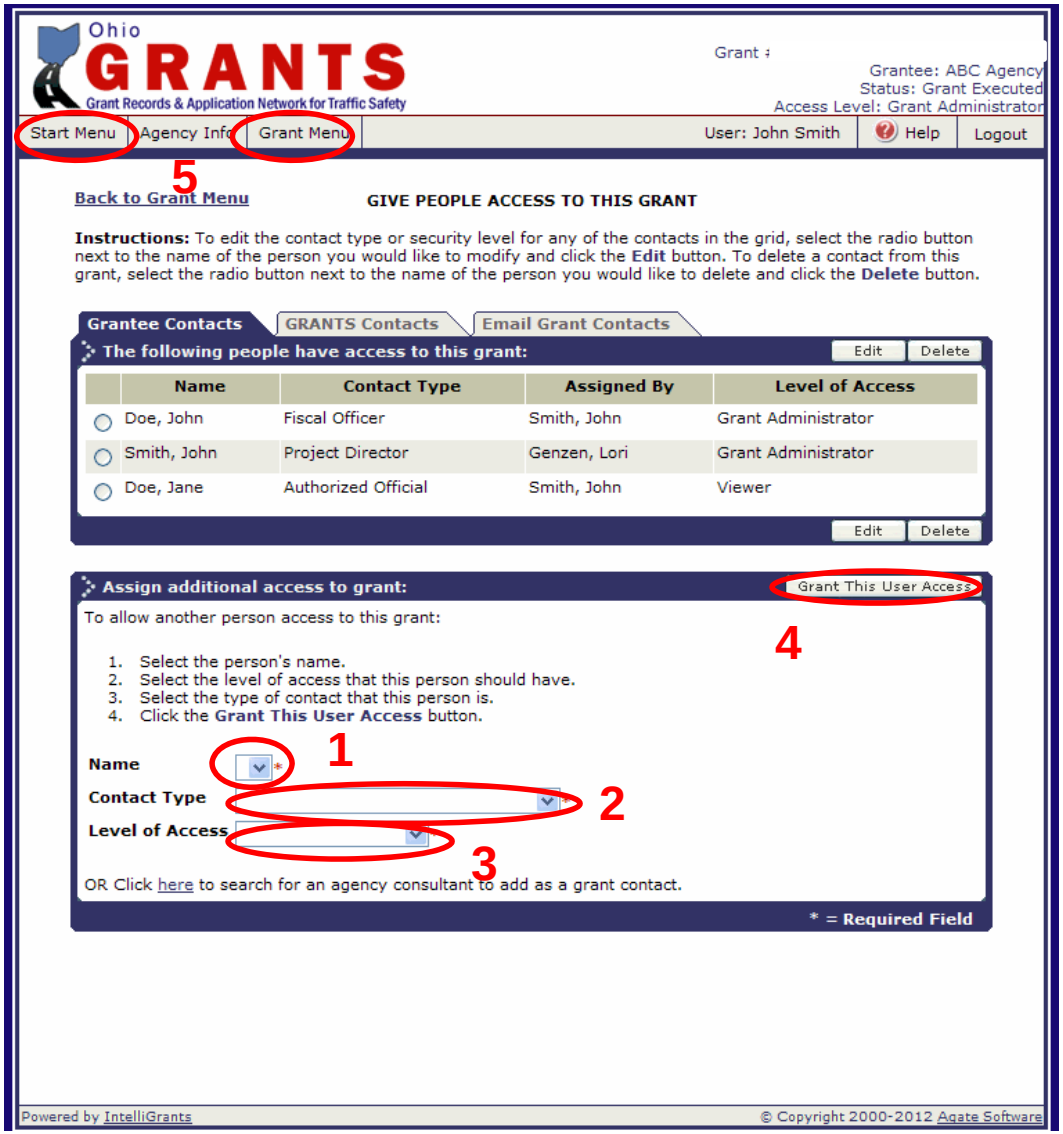
Controlling Access to Grant

To add additional people:

1. Select the person's name.
2. Select the Contact Type (Authorized Official, Fiscal Officer, etc.)
3. Select level of access.
4. Click the "Grant This User Access" button.

Repeat until all necessary people have been added.

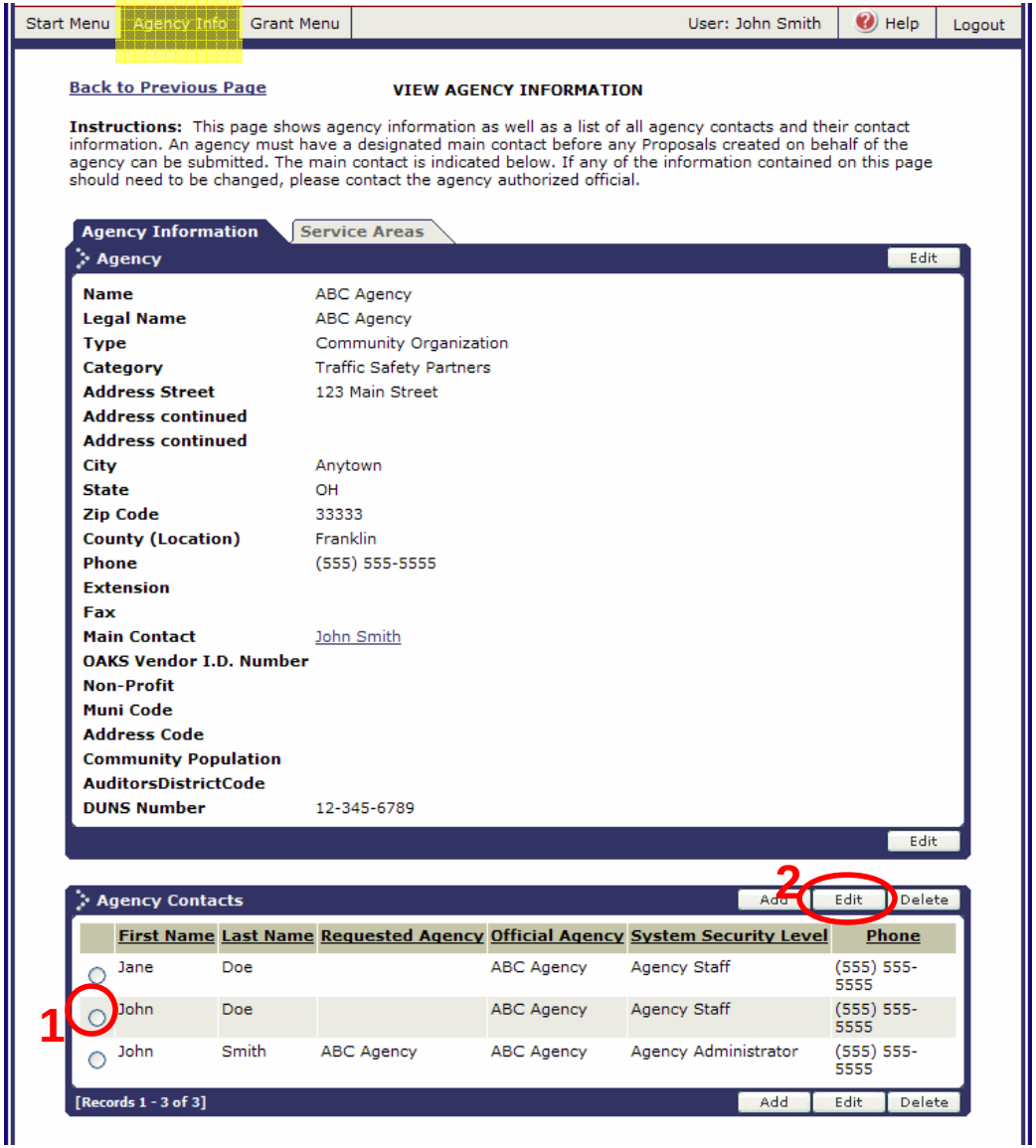
5. Click "Grant Menu" to return to your grant or "Start Menu" to return to your task list.



Controlling Access to GRANTS

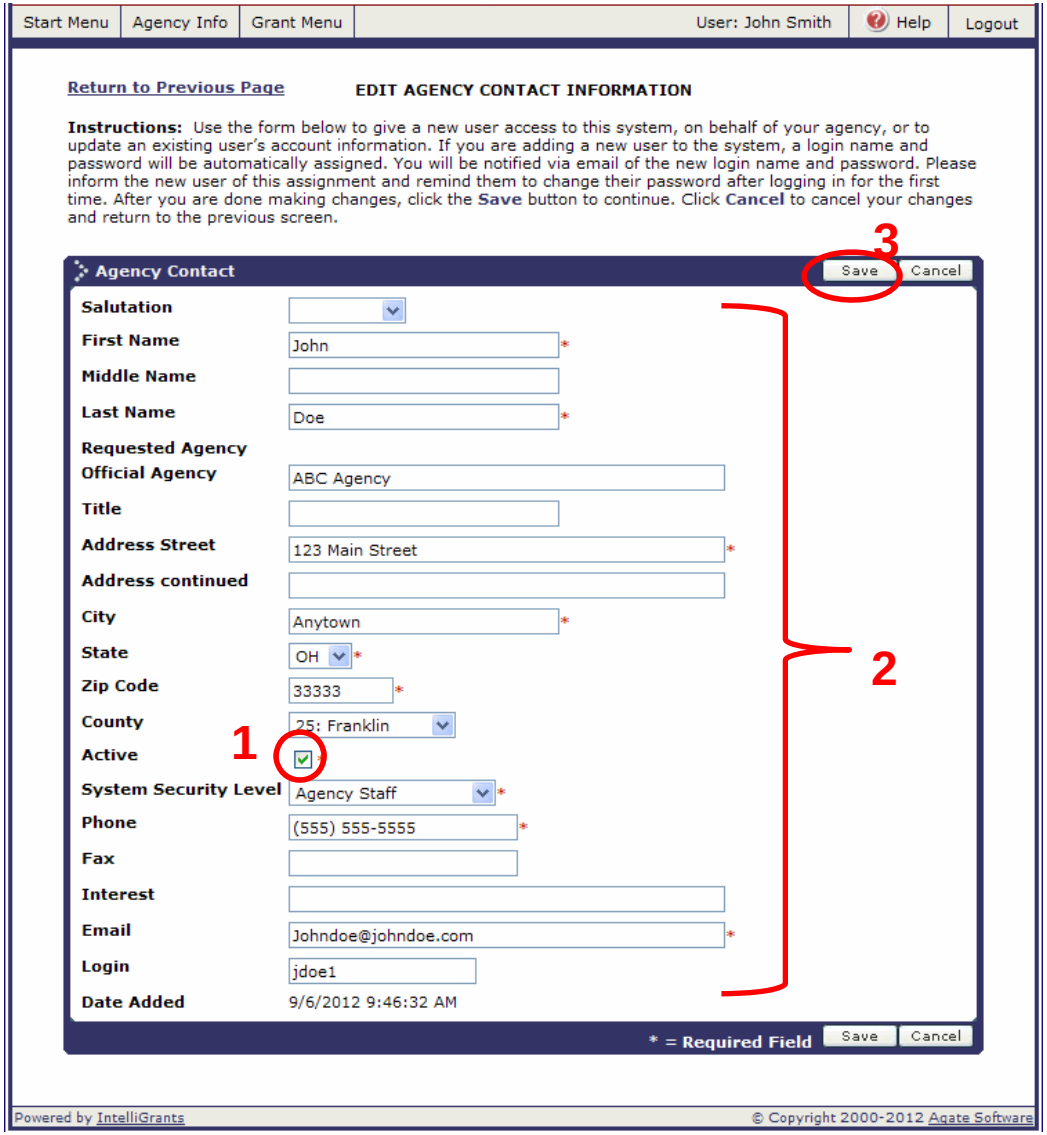
To manage user's access click on "Agency Info".

1. To edit existing users, click the radio button next to the user's name.
2. Click "Edit".



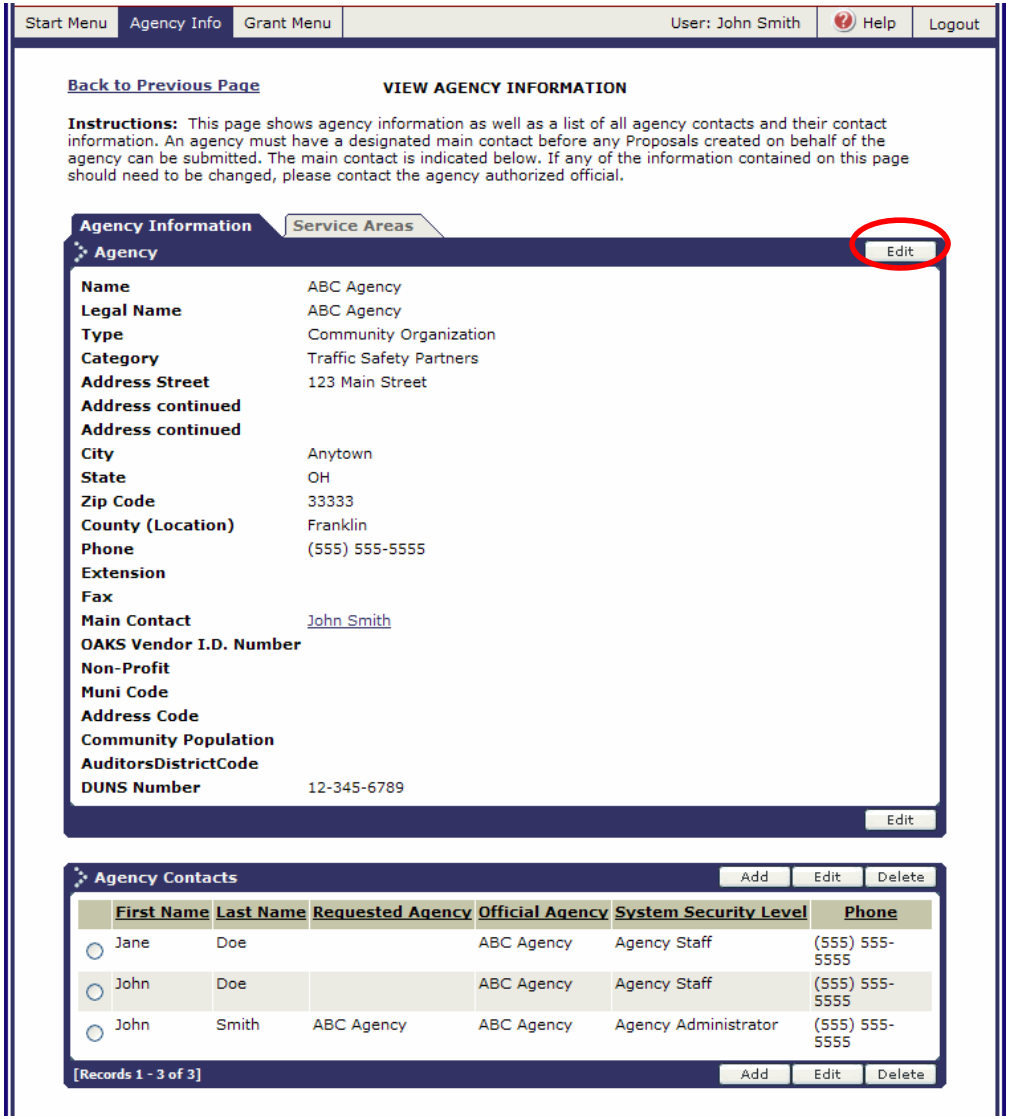
Controlling Access to GRANTS

1. To de-activate the user (they will no longer be able to access the GRANTS System), click the box next to “Active” – this will remove the checkmark.
2. To update address, phone number, email address, etc. – make the change in the appropriate field.
3. Click “Save”.



Agency Information

If the agency information needs updated (address, phone number), click “Edit”.

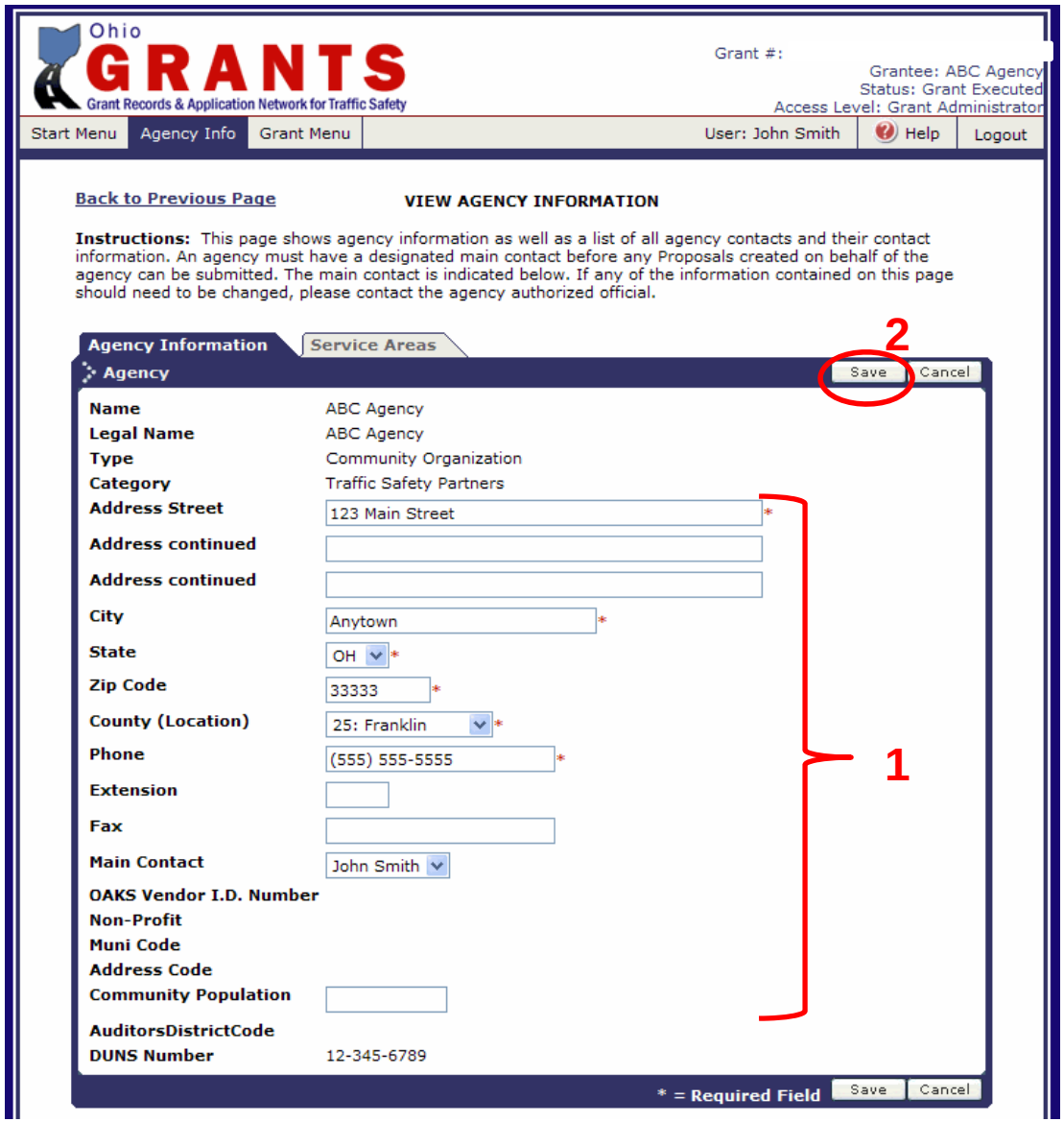


Agency Information

1. Make changes.
2. Click “Save”.

Only the fields outlined with a box can be edited. If you need information updated that is not accessible please email otso@dps.ohio.gov

Check the box next to controlling access to the grant and the GRANTS system on the Pre-Activity form.



Pre-Activity Form Completion

Once you have finished the presentation, reviewed and updated the grant contact information, sign the completed form and fax it to 614-752-4646 or scan and email to otso@dps.ohio.gov

Save this presentation as a user guide throughout the grant year for claims, reports and revisions.