

**Ohio**

**Department of  
Developmental Disabilities**

# GMS Webinar

## Early Intervention Grants

March 14, 2023

Presented by: Jennifer Jones-Erwin  
Jacob Foskuhl

The logo for the state of Ohio, featuring a red outline of the state's shape to the left of the word "Ohio" in a dark red, serif font.

# Department of Developmental Disabilities

Questions are encouraged during the presentation via  
the Go To Webinar Questions Box

The logo for the Ohio Department of Developmental Disabilities. The word "Ohio" is written in a bold, dark red serif font. The letter "O" is a red outline of a circle. A vertical line is positioned to the right of the word "Ohio".

**Ohio**

# **Department of Developmental Disabilities**

This webinar is recorded and will be made available to DODD Early Intervention grantees.

# GMS Webinar Overview

- **(GMS) Access & Navigation**
  - Frequent Access Questions & Reminders
  - Navigation
- **Budgets**
  - Structure & Status Definitions
- **GMS – Expenses**
  - Creating Expenses & Timeframes
  - Personnel
  - Contracts
  - Documentation Uploads

# Polling Activity!!

## Question 1

**Please tell us where you are experiencing the most issues within GMS.**

1. **Access**
2. **Navigation**
3. **Budget**
4. **Expenses**

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**GMS Access & Navigation**

# GMS – Requesting Access

- **New users** can gain access to GMS by following the instructions posted online
  - GMS If you have never accessed DODD Applications, you must first have an active OH|ID registered.
  - Can be accessed through DODD Applications
  - There are 3 guides that aim to allow grantees to administer grant budgets, submit expense reports, and upload support documentation for their grants.
  - Navigate to <https://dodd.ohio.gov/about-us/dodd-apps/GMS>
    - [GMS OHID Login Guide](#)
    - [GMS Grantee Setup User Guide](#)
    - [User Guide - GMS Navigation, Budget Records, and Expenses](#)
  - COMING SOON! New security model for gaining access to DODD Apps
    - Existing GMS users that already have a DODD portal account
      - New pathway for logging in but no anticipated changes to profiles

# GMS – Establishing Access

- **GMS Roles**

- Preparer & Submitter – Role selection matters
- New users will need a **Supplier ID** to select the organization/county in which they wish to be associated.
  - If you do not know which supplier ID to use, please reach out to your organization.

## **FAQ: I am having issues logging in using my current OH|ID. Why?**

- Do NOT use your employee OH|ID (i.e., 5xxxxxxx, 1xxxxxxx, etc.) as it is already registered to the State and will not be able to be used independently for DODD Applications. You must create a new one with a different email address associated.





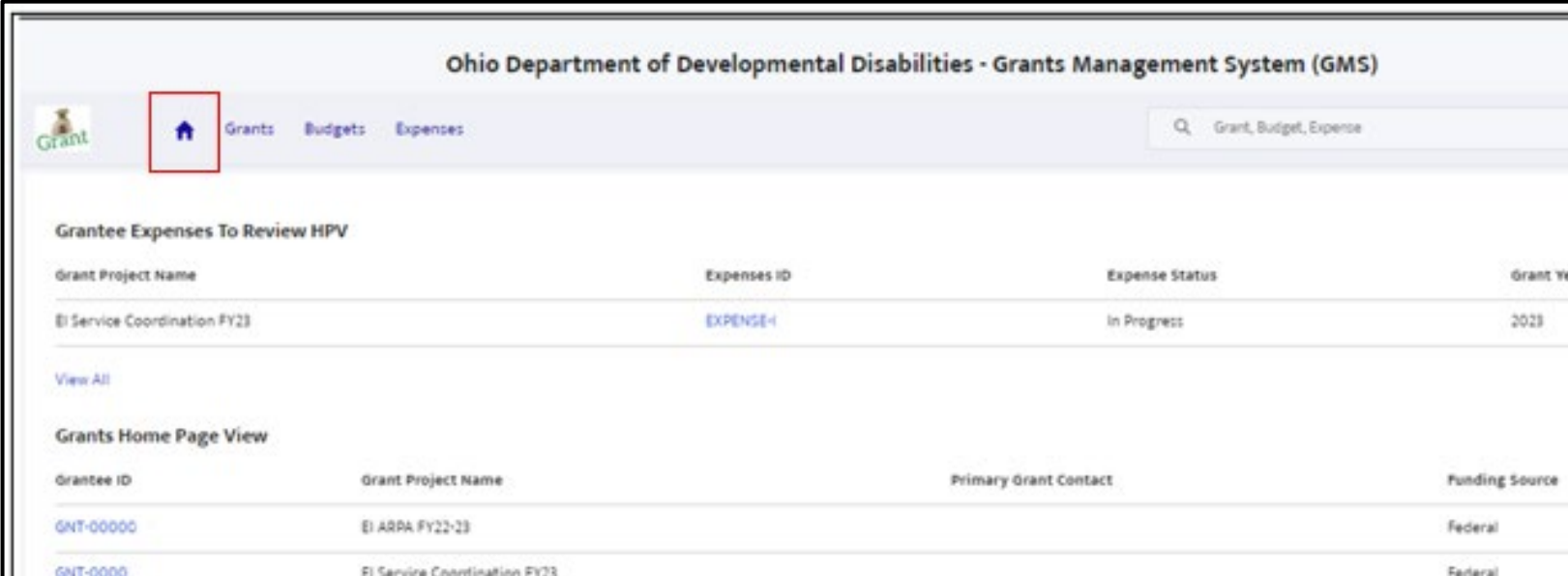
# GMS – Profile Access reminders

## FAQ: Why can't I see the other organizations I manage in GMS?


- Each DODD user profile can only be linked to one organizational account in GMS (i.e., CBDD, Commissioners, COG, etc.).
  - If you are managing two separate organizations, you should have two separate DODD profiles with access to GMS.
- In order to navigate between profiles without a browser caching issue, it is important to use two separate browsers (Chrome, Edge, Firefox, Etc.), or log in "Incognito" mode in Chrome.

# GMS – Navigation

- Once logged into GMS, users will see 4 **blue** navigational links at the top of the page ( , Grants, Budgets & Expenses).
- GMS displays pending items for review on the homepage (  ) and it will display information regarding Grant Projects assigned to you.



Ohio Department of Developmental Disabilities - Grants Management System (GMS)

Grant  Grants Budgets Expenses

### Grantee Expenses To Review HPV

Grant Project Name	Expenses ID	Expense Status	Grant Year
EI Service Coordination FY23	EXPENSE-1	In Progress	2023

[View All](#)

### Grants Home Page View

Grantee ID	Grant Project Name	Primary Grant Contact	Funding Source
<a href="#">GNT-0000</a>	EI ARPA FY22-23		Federal
<a href="#">GNT-0000</a>	EI Service Coordination FY23		Federal

# GMS – Navigation

- Both **Budgets** & **Expenses** will display all records assigned to a user as well as any records they have access to view.
- This page will always default to **Recently Viewed** so be sure to select the preferred budget or expense status from the drop-down box.

Ohio Department of Developmental Disabilities - Grants Management System

Grant Budgets Expenses

Budgets Recently Viewed

3 items

Search lists...

RECENT LIST VIEWS

- 1 Grantee Budgets To Review HPV
- 2  Recently Viewed
- 3 ALL OTHER LISTS

Budget Snapshots

Budgets Approved

Budgets Awarded with conditions

Budgets Closed

Budgets Denied

Budgets Home Page View

Budgets Submitted

Budgets View (Trad & Deliverable)

Grantee	Grantee Name
GNT-0000C	County Job & F
GNT-00000	County Job & F
GNT-0000	County Job & F

# GMS – Navigation

- Currently, there is no information to display on the **Grants** tab. There may be information displayed in enhancements.

Ohio Department of Developmental Disabilities - Grants Management System

Grant Projects

All

0 items • Sorted by Grant Project ID • Filtered by All grant projects • Updated 2 minutes ago

Grant Project ID	Grant Project Name	Grant Type	Budget Type	Number Of Grant Y...	Fiscal Year Basis
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**GMS Budget**

Status & Submissions

# GMS – Budgets Structure

- Grants will be created with a **Traditional** or **Deliverable** budget type. A Traditional grant provides a dollar amount that is budgeted for specific Grant Categories (Personnel, Contracts, etc.). A Deliverable grant provides grant dollars based on specific activities or milestones that are required to be met by the Grantee.
- Traditional Budget Examples include:
  - EI Service Coordination
  - EI ARPA

# GMS – Budget Status

- **Awarded with Conditions** - These Budget Records are pending and need to be modified or adjusted before they can be approved by DODD. Budgets that have been **Awarded with Conditions** will show more information in the Award Conditions field.
  - The grantee must provide dollar amounts for each category and upload documentation, if applicable.
  - Grantees need to allocate their full budget into the various traditional budget categories (Personnel, Contracts, etc.).
  - Grantee should click the pencil icon next to the category (Personnel, Contracts, etc.) to make the relevant fields editable.
  - Once the category amounts are updated, the grantee must click **Submit** in the upper right-hand corner of the budget.
- **Submitted** - These Budget Records are submitted to DODD and need to be reviewed by Program staff and Fiscal staff before they can be approved by DODD. Once approved, grantees may move forward with expensing.

# GMS – Budget Status

- **Denied** - If conditions identified by DODD are not met by the Grantee, DODD Staff will deny a Budget Record, and an email will be sent to the Grantee so that changes can be made, and the budget may be resubmitted. The Budget Record will show **Denied** in the **Budgets** tab.
- **Approved** – Once the budget has been approved by DODD, the grantee may begin expensing against the budget.
- **Modification/Amendment in Progress** – This status means that the previously approved budget has been unlocked for the grantee to make changes to budget categories such as Personnel, Contracts, etc.
  - Currently, grantees are not able to upload supporting documents – Please send to Jennifer Jones-Erwin for those uploads until further notice.
  - A revised budget justification is required to be uploaded anytime the budget is changed.
  - Category threshold of 10% - Modification may not always be necessary.

**Note:** Budget reviews are a 2-step process. Program staff will review the initial budget submission, and then moved to fiscal for review.



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**GMS Expenses**

# GMS – Expenses

- **In-Progress** – This is the default status that is assigned to an expense before ever submitted to DODD.
- **Submitted** – The expense report has been submitted to DODD and is currently being reviewed by Program and Fiscal staff.
- **Denied** – The expense report has been denied back to the grantee for corrections. The grantee should make necessary changes and click Submit at the top of the screen.
  - If the report is in Denied status, GMS will not allow modifications or budget amendments.
- **Payment Approved** – The expense report was approved by DODD and has been paid.
- **Payment Rejected** – Rarely utilized, but if there is a technical or programmatic issue with a report, you may occasionally see this status.

**EI Service Coordination Payment Reporting** - SFY23 EISC payment reporting is updated 1-2 times per month depending on the frequency of payments: <https://ohioearlyintervention.org/service-coordination-grant-agreements>

**\*\*State vs. Federal Funds:** The source of funds associated with each grant payment is available to subrecipients to inform SEFA reporting and revenue deposits as needed. Funding information will be available via the payment message field. This can be viewed using the OAKS EFT lookup website, administered by the Office of Shared Services. The website address is <http://remitlookup.obm.ohio.gov/>. Questions about how to use the site should be directed to the Office of Shared Services (OSS) by emailing [ohiosharedservices@ohio.gov](mailto:ohiosharedservices@ohio.gov). If additional information about these resources or a direct deposit is needed, call OSS at 1-877-644-6771. At least twice annually, DODD will provide the total amount of disbursements made using each funding source: state general revenue funds (GRF) or Federal (by FAIN).

# GMS – Expense Reminders

- **Open Expenses** - Budgets that have an expense with a status of Submitted, In-Progress or Denied will not allow the grantee to create another expense until that report is marked as Payment Approved.
- **Expense timeline** – GMS will not allow an expense to be created immediately after a previous expense was paid. The grantee must wait 25-days from the last submission date.

# GMS – Creating an Expense

- First, navigate to the budget page and click **Create Expenses** at the top of the page.

The screenshot shows the budget page for 'County Job & Family Services-Budget-2023'. At the top right, there are three buttons: 'Close', 'Create Expenses' (highlighted with a red box), and 'Request Budget Amendment'. Below the header, there is a summary table with the following data:

Grant Project Name	Grantee Name	Budget Amount	Budget Status	Status
EI Service Coordination FY23	County Job & Family Services	\$103,962.00	Approved	Approved

Below the summary table, there is a 'Details' section on the left and a 'Files (3)' section on the right. The 'Files (3)' section contains three files: 'FY23 personnel spreadsheet' (13KB, xlsx), 'Addendum C - Standard Affirmation Form (EO 20...' (166KB, pdf), and 'Addendum B-EI-Contact-Sheet (2)' (21KB, xls).

- Once created, you should see the name of the newly created expense on the right-hand side of the budget page. Click on the **blue Expense Name** of the **In-Progress** report to open it.

The screenshot shows the budget page with the 'Expenses (4)' section highlighted in red. At the top right, there are three buttons: 'Close', 'Create Expenses', and 'Request Budget Amendment'. Below the header, there is a summary table with the following data:

Grant Project Name	Grantee Name	Budget Amount	Budget Status	Status
EI Service Coordination FY23	County Job & Family Services	\$103,962.00	Approved	Approved

Below the summary table, there is a 'Details' section on the left and a 'Files (2)' section on the right. The 'Files (2)' section contains two files: 'Exhibit-C-Budget-Justification FY23' (36KB, docx) and 'Addendum-B-EI-Contact-Sheet (2)' (21KB, xls).

The 'Expenses (4)' section contains a table with the following data:

Expense Name	Expense Status	Current Period Total Ex...	Year To Date Total Expe...
EI Service Coordination F...	In Progress	\$7,497.00	\$66,664.50
EI Service Coordination F...	Payment Approved	\$14,222.46	\$0.00
EI Service Coordination F...	Payment Approved	\$35,217.00	\$0.00
EI Service Coordination F...	Payment Approved	\$31,447.50	\$35,217.00

# GMS – Entering Personnel Expenses

- Common issues we see with Personnel entries:
  - **Different naming conventions** – Personnel should only be the individual's name being expensed.
  - **Multiple entries for one person** - Only one entry person is needed as it tracks YTD data.
    - Once the entry is created the first time, it will populate on every expense report moving forward.
  - **Salary & Fringe** – § 200.431 Compensation - fringe benefits.
    - DODD interprets this guidance to mean that you should be charging fringe in the same manner as you do wages and salaries. If this is accurately done, the fringe should be roughly charged at the same rate as wages (%).

# GMS – Personnel Name

Ohio Department of Developmental Disabilities - Grants Management

[Home](#) [Grants](#) [Budgets](#) [Expenses](#)

[Expenses](#) > EXPENSE-  
Personnel Expense

1 item • Updated a few seconds ago

	Name	In...	Job Title	Total Payroll	Total Grant
1	<a href="#">County FCF 1st quarter</a>	<input checked="" type="checkbox"/>	FCFC Program Director	Current Salary: \$1584.75 Current Fri...	Current Salary:\$1584.75 Current Frin...

# GMS – Multiple Personnel Entries

[Create Personnel](#) [Create Contract](#) [Create Equipment](#) ▼

Grant Year Start Date  
Grant Project Name  
EI Service Coordination FY23

Personnel Expense (6+)

Name	Include In This ...	Job Title	Total Payroll
<a href="#">July-.....</a>	<input type="checkbox"/>	HMG EI Contract...	Current Salary: \$... ▼
<a href="#">July-.....</a>	<input type="checkbox"/>	FACFC Executive...	Current Salary: \$... ▼
<a href="#">Aug-.....</a>	<input type="checkbox"/>	FACFC Executive...	Current Salary: \$... ▼
<a href="#">Aug-.....</a>	<input type="checkbox"/>	EI Contract Man...	Current Salary: \$... ▼
<a href="#">Sept-...</a>	<input type="checkbox"/>	EI Contract Man...	Current Salary: \$... ▼
<a href="#">Sept-...-</a>	<input type="checkbox"/>	FACFC Executive...	Current Salary: \$... ▼

[View All](#)

# GMS – Entering Contract Expenses

- Common issues we see with Contract entries:
  - **Different naming conventions** – The contract name should indicate what contract is being expensed.
  - **Missing Contract** - Every sub-contract must be uploaded into GMS 1<sup>st</sup> expense
  - **Multiple entries for one contract** - Only one entry contract is needed as it tracks YTD data.
    - Once you create a contract in GMS, all related contract uploads and expense detail will populate on each new report going forward.



# GMS – Name of Contract & Duplicating

Contract Expenses (3)				
Name	Include In This ...	Contract Descri...	Amount	
<a href="#">LFCAA</a>	<input checked="" type="checkbox"/>	Contract betwe...	\$37,975.00	▼
<a href="#">Oct-LFCAA</a>	<input type="checkbox"/>	Contract betwe...		▼
<a href="#">Sept-LFCAA</a>	<input type="checkbox"/>	Contract betwe...		▼
				<a href="#">View All</a>
Equipment Expenses (0)				

# GMS – Uploading Supporting Docs

- Uploading into the budget:
  - Drag and drop files into “Upload Files” area.
  - Click the “Upload Files” button and browse to load your files.
  - Click “Add Files” and select the files you want to add

The screenshot displays the Ohio Department of Developmental Disabilities - Grants Management System (GMS) interface. The page title is "Ohio Department of Developmental Disabilities - Grants Management System (GMS)". The navigation bar includes "Grant", "Grants", "Budgets", and "Expenses". A search bar contains "Grant, Budget, Expense" and a user profile for "Pete GMS".

The main content area shows a budget entry for "COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget". The budget details include:

Grant Project Name	Grantee Name	Budget Amount	Status
Sole Source w Conditions	COUNTY BOARD OF DEVELOPMENTAL DISABILITIES	\$5,000	Awarded with conditions

The interface includes tabs for "DETAILS" and "ACTIVITY". The "DETAILS" tab is active, showing the following information:

- Award Conditions:** w/ conditions, provide detail on drivers.
- Primary Contact:** Pete GMS
- Budget Information:**
  - Budget ID:** BGT-00000043
  - Budget Name:** COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2021
  - Budget Type:** Traditional
  - Grant Category:** Personnel
  - Budget Amount:** \$5,000
  - YTD Amount Spent:** \$0.00
  - Amount Remaining:** \$5,000.00
  - Is Fixed Categories:**

On the right side of the interface, there are three sections:

- Budget Changes (0)**
- Expenses (0)**
- Files (0)** - This section contains an "Add Files" button and an "Upload Files" button (highlighted with a red box). Below the "Upload Files" button is a dashed box labeled "Or drop files".

# GMS – Uploading Supporting Docs

- Uploading into expenses:
  - Documents must be uploaded inside the **expense category**.
  - Drag and drop files into “Upload Files” area.
  - Click the “Upload Files” button and browse to load your files.
  - Click “Add Files” and select the files you want to add

The screenshot displays the 'Staff' record in the GMS system. The 'EXPENSE MAIN' section is active, showing a table with the following data:

Expense Category	Current Grant Grand Total	YTD Grant Grand Total
Personnel	\$50,000.00	\$0.00

Below the table, the 'General' section is expanded, showing the following fields:

- Name: Staff
- Expense: EXPENSE-00089
- Include In This Period:
- Job Title: Driver

On the right side of the interface, there is a 'Files (0)' section. It contains an 'Add Files' button and an 'Upload Files' button. The 'Upload Files' button is highlighted with a red box, and the text 'Or drop files' is highlighted with a yellow box.

# Polling Activity!!

## Question 2

**Where would you like to see more technical assistance focused?**

- 1. Budget**
- 2. Expenses**



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# GMS Demo

<https://ohdodd--uat.sandbox.my.site.com/GMS/login>



# Questions

**Please send follow up questions to:**

[Jennifer.jones-erwin@dodd.ohio.gov](mailto:Jennifer.jones-erwin@dodd.ohio.gov)

[Jacob.Foskuhl@dodd.ohio.gov](mailto:Jacob.Foskuhl@dodd.ohio.gov)