



Department of Developmental Disabilities
Division of Information Technology Services

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Grant Management System Grantee Setup & User Guide

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Department of Developmental Disabilities
Division of Information Technology Services
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Creating a GMS Role Profile

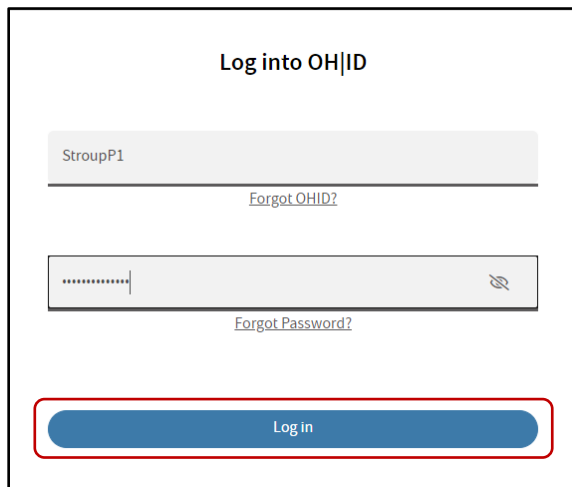
In this section, we will create a new GMS role for your profile. To create a new OH|ID account, follow the [OHID Login Guide](#). The external roles for GMS are **Preparer**, **Submitter**, and **Reviewer**.



Once you have created GMS roles you will need to login with the associated OH|ID. If you already have your GMS roles created, you can skip to the [GMS Access – Frequently Asked Questions](#) section.

Preparer & Submitter Roles

1. In your browser, enter <https://dodd.ohio.gov> and log in with your OH|ID Username & Password. Click **Log in**.

A screenshot of the 'Log into OH|ID' login page. The page has a white background with a black border. At the top center, it says 'Log into OH|ID'. Below this, there are two input fields. The first field contains the text 'StroupP1' and has a link 'Forgot OHID?' below it. The second field contains a series of dots and has a link 'Forgot Password?' below it. At the bottom of the form, there is a blue button with the text 'Log in' inside it, which is highlighted with a red rectangular border.

2. If you do not have an OH|ID follow the [OH|ID Login Guide](#).
3. After logging in, you will see a menu of available accounts under your OH|ID. Click the **Create an additional New Profile** and click **CONTINUE**.

Ohio | Department of Developmental Disabilities

Welcome DYNCLDTEST, Peter !!

Please select following option to proceed:

- Continue with Logged In User Profile
[Account Type: DODD, Role: Foundation]
- Go To My Learning
- Create an additional New Profile

CONTINUE

If you have any questions or comments regarding your request, please contact our ITS Call Center for assistance.
Email: ITSCallCenter@dodd.ohio.gov, Phone: 1-800-617-6733 (Toll Free) between 8:00 a.m. and 4:00 p.m. Select Option 4.

4. Click the **I need access to the Grant Management System (GMS)** radio button and click **NEXT**.

Welcome GMS, Pete !!

Please choose your profile:

- Go To My Learning
- I want to be a DODD Provider
- I want to be a Billing Agent
- I want to be a County Board Worker
- I want to be a subrecipient of early intervention grant dollars and need access to EIGS
- I work for the Ohio Department of Developmental Disabilities (DODD)
- I work for an Ohio Council of Governments (COG)
- I work for the Ohio Department of Health
- I need access to the Early Intervention Data System (EIDS)
- I work for Ohio Developmental Centers (DCs)
- I need Secretary access to the Medication Administration Information System (MAIS)
- I want to be a certified RN Trainer and will need access to Medication Administration Information System (MAIS)
- I need access to the Grant Management System (GMS)

BACK **NEXT**



You must provide a supplier ID to request a **GMS_Preparer** or **GMS_Submitter** role. If you do not know which supplier ID to use, please reach out to your organization.

5. Enter the 10-digit **Supplier ID** in the text box and hit **Search**. You will see the list of search results with **Name/County** and **Address** information.



Supplier ID is a 10-digit number (Per OAKS system). Please prefix 00000 before numbers. For example, supplier ID for ADAMS county is 56160 but I have entered 0000056160 in the search box.

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Welcome **GMS, Pete !!**

You informed us that you need access to the **Grant Management System (GMS)** & have Supplier ID.

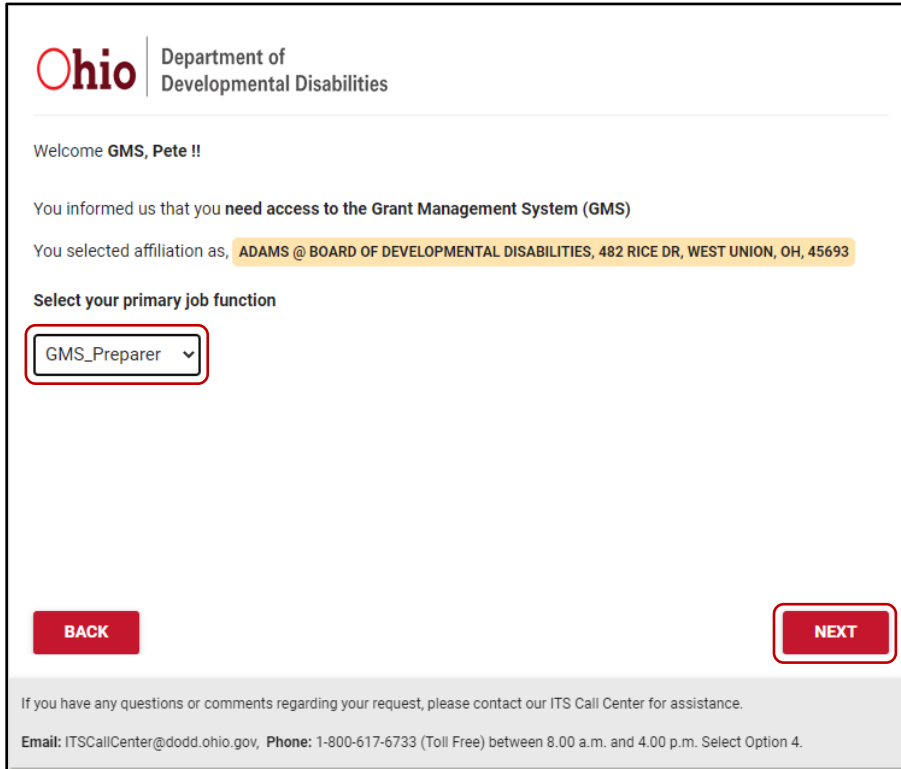
Enter Supplier ID :

	County / Name	Address
<input type="radio"/>	ADAMS	PROSECUTORS OFFICE, 110 W MAIN ST, WEST UNION, OH, 45693
<input type="radio"/>	ADAMS	TREASURERS OFFICE, 110 W MAIN ST, WEST UNION, OH, 45693
<input type="radio"/>	ADAMS	CLERK OF COURTS, 110 W MAIN ST, WEST UNION, OH, 45693
<input type="radio"/>	ADAMS	COMMISSIONERS, 215 N CROSS ST RM 102, WEST UNION, OH, 45693
<input type="radio"/>	ADAMS	HEALTH DEPT, 923 SUNRISE AVE, WEST UNION, OH, 45693
<input type="radio"/>	ADAMS	JOB & FAMILY SERVICES, PO BOX 386, WEST UNION, OH, 45693-0386
<input type="radio"/>	ADAMS	JOB & FAMILY SERVICES, 482 RICE DR, WEST UNION, OH, 45693
<input type="radio"/>	ADAMS	BOARD OF DEVELOPMENTAL DISABILITIES, 482 RICE DR, WEST UNION, OH, 45693

If you have any questions or comments regarding your request, please contact our ITS Call Center for assistance.
Email: ITSCallCenter@dodd.ohio.gov, Phone: 1-800-617-6733 (Toll Free) between 8.00 a.m. and 4.00 p.m. Select Option 4.

6. Select the Organization/County with address info you want and click **NEXT**.

7. Choose your role from the drop-down menu. Click **NEXT**.



The screenshot shows a web form for GMS setup. At the top left is the Ohio logo and the text "Department of Developmental Disabilities". Below this is a welcome message: "Welcome GMS, Pete !!". The next line states: "You informed us that you need access to the Grant Management System (GMS)". This is followed by the selected affiliation: "ADAMS @ BOARD OF DEVELOPMENTAL DISABILITIES, 482 RICE DR, WEST UNION, OH, 45693". The section "Select your primary job function" contains a dropdown menu with "GMS_Preparer" selected. At the bottom of the form are two buttons: "BACK" on the left and "NEXT" on the right. A footer section contains contact information: "If you have any questions or comments regarding your request, please contact our ITS Call Center for assistance. Email: ITSCallCenter@dodd.ohio.gov, Phone: 1-800-617-6733 (Toll Free) between 8.00 a.m. and 4.00 p.m. Select Option 4."

8. Enter the PIN you have created, check **I hereby acknowledge and accept**, and click **SUBMIT**.

Ohio Department of Developmental Disabilities

Welcome GMS, Pete !!

You informed us that you need access to the Grant Management System (GMS)

You selected an affiliation as: ADAMS @ BOARD OF DEVELOPMENTAL DISABILITIES, 482 RICE DR, WEST UNION, OH, 45693

You selected primary job function as: GMS_Preparer

Temporary PIN

12345

Create your own 5-digit numeric PIN for account verification. You will need this later in the verification process.

Please read the information carefully before you submit.

Important Note: DODD Data Security and Confidentiality Agreement

Security and confidentiality are a matter of concern for all users of Department of Developmental Disabilities (DODD) information systems and all other persons who have access to DODD data.

Each person authorized to access DODD systems holds a position of trust relative to this information and must recognize the responsibilities entrusted to him/her in preserving the security and confidentiality of this information. Confidentiality requirements contained in law include, but are not limited to, ORC sections 5123.62(T), 5123.89 and 5126.044. An authorized user's conduct, either on or off the job, may threaten the security and confidentiality of this information.

It is the responsibility of every user to understand and comply with the following:

- You must not make or permit unauthorized uses, nor violate the confidentiality or privacy, of any information in files maintained by DODD.
- You must not seek to benefit personally or permit others to benefit personally by any confidential information that has come to you by virtue of your work duties.
- You must not exhibit or divulge the contents of any record to any person except in the conduct of your work duties or in accordance with the policies of DODD.
- You must not knowingly include or cause to be included in any record or report a false, inaccurate, or misleading entry.
- You must not delete or cause to be deleted any official record or report from any file from the system where it is stored except when required in the performance of your duties.
- You must not violate rules and regulations concerning access to controlled areas.
- You must not divulge or share any security codes (i.e., user-names, passwords, etc.) used to access any secured files.
- You must immediately report any violation of this policy by anyone to the DODD/IT Security Manager.

I hereby acknowledge and accept

BACK **SUBMIT**

If you have any questions or comments regarding your request, please contact our ITS Call Center for assistance.
Email: ITSCallCenter@dodd.ohio.gov, Phone: 1-800-617-6733 (Toll Free) between 8:00 a.m. and 4:00 p.m. Select Option 4.

9. A confirmation screen will appear. Verify the information, then click **CONTINUE**.

Ohio Department of Developmental Disabilities

Welcome KOPTest, DODDtest !!

Thank you for submitting your account to register with us. You will receive an email shortly that will guide you through the next step. If this process require an approval you would be notified.

You informed us that you County Board Worker

You selected an affiliation as: Allen County

You selected primary job function as: Foundation

You created temporary PIN as: 12345

If you do not see the email in your inbox, please check your spam or junk folder as it may have found its way there in error. If you find it please be sure to identify the email as "not junk" non-spam email. You'll also want to add our email address to your safe sender list.

CONTINUE

If you have any questions or comments regarding your request, please contact our ITS Call Center for assistance.
Email: ITSCallCenter@dodd.ohio.gov, Phone: 1-800-617-6733 (Toll Free) between 8:00 a.m. and 4:00 p.m. Select Option 4.

10. You will receive a confirmation email which will include your temporary PIN. Click on the link in the email to verify your account.

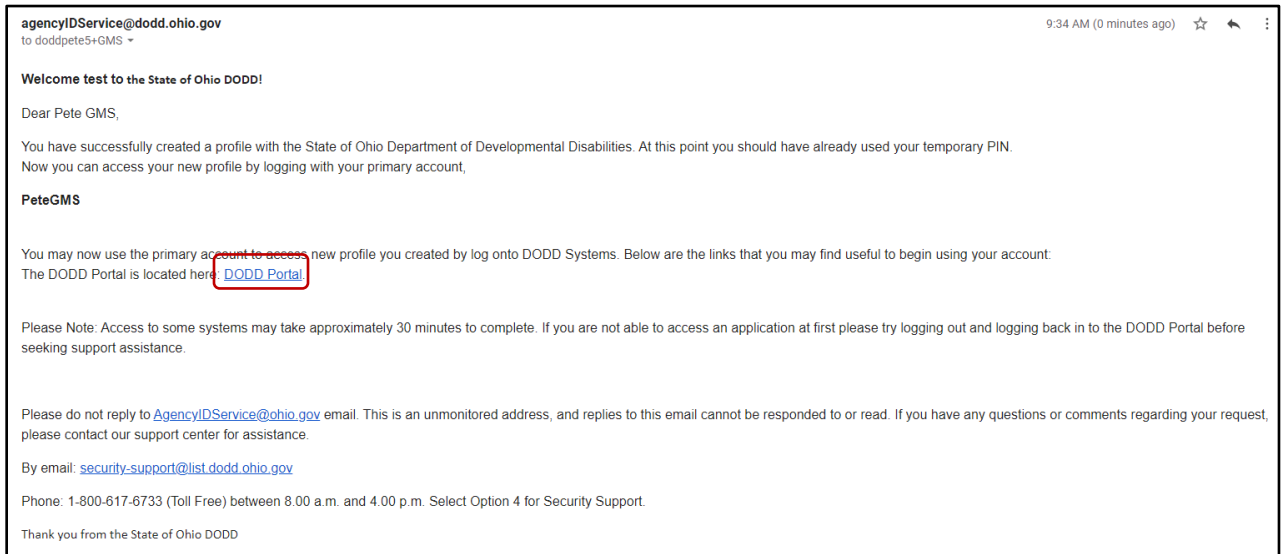


11. Enter the temporary PIN from the email and click **Continue**. The success message will be displayed.

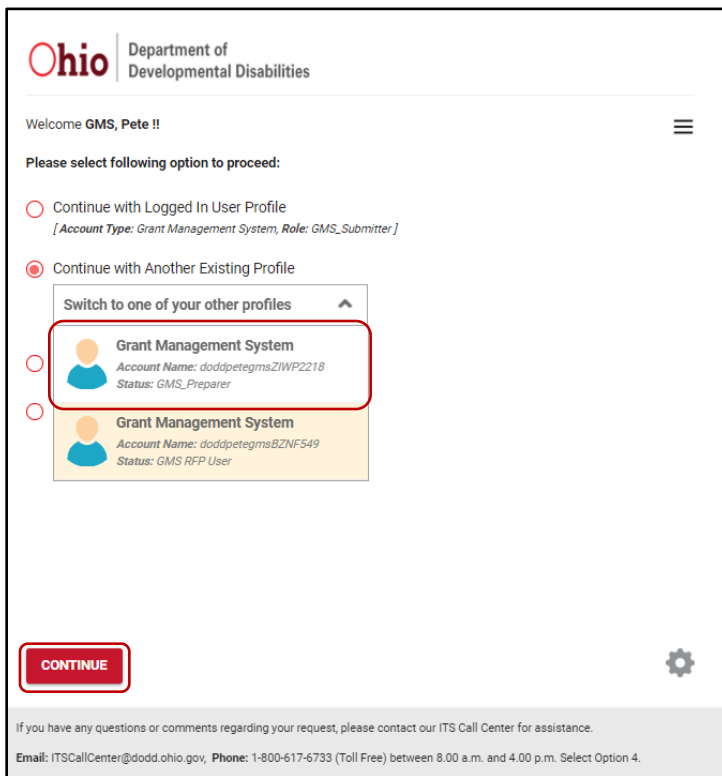


Close all open tabs and the browser window. You have completed the setup steps for creating a **GMS Preparer** or **Submitter**. Your account must now be approved. Once the request has been approved, you will receive an email from AgencyIDService@ohio.gov indicating that an account is ready for use.

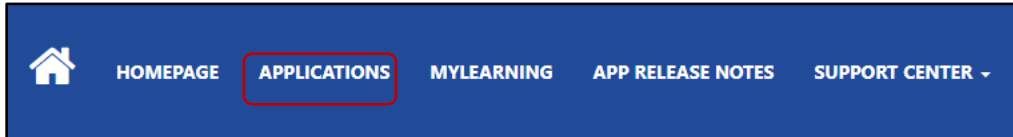
12. You will receive another email letting you know your role is ready to be used. Click the **DODD Portal** link to open the portal as your **Preparer** or **Submitter**.



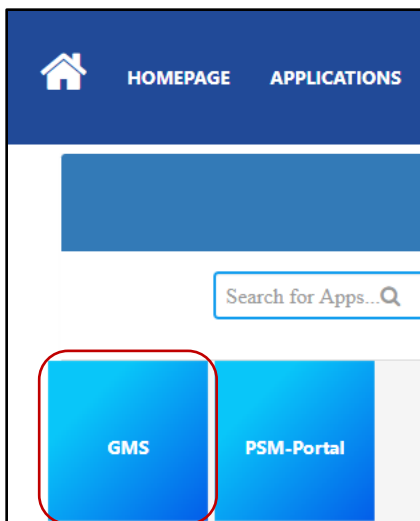
13. Enter your OH|ID and you will be given an option to select the profile you have created from the list. Choose the **GMS_Prep** or **GMS_Submitter** role. Click **CONTINUE**.



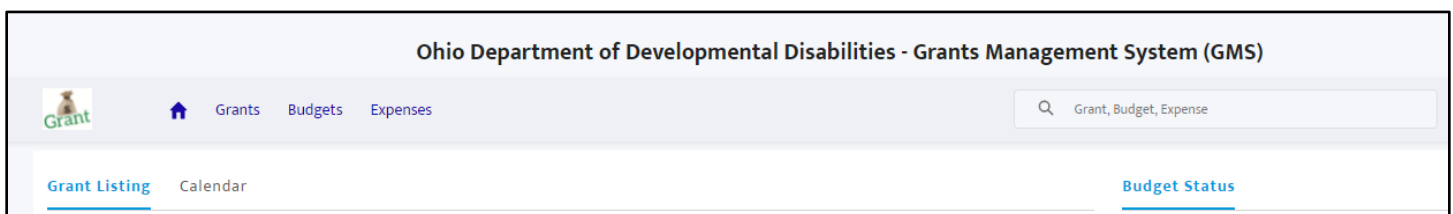
14. When you see the DODD Application Portal, click **APPLICATIONS**.



15. Click the **GMS** tile to access the Grant Management System.



16. You should see the **Ohio Department of Developmental Disabilities – Grants Management System (GMS)** home page.



GMS Access - Frequently Asked Questions

If you cannot access GMS – please try the following solutions:

- Verify that you received an email from DODD IT stating that your DODD account has been created and/or that your role request has been approved
- Try ignoring the link from your automated email and logging in directly via the DODD website (same method as EIGS)
- Close existing tabs in a browser and start fresh
 - You need to exit out of ALL tabs in a browser (completely exit out of Chrome, etc.)
- Use an Incognito browser
- Once the GMS tile is visible, select a profile with the correct GMS role (preparer or submitter).
 - If you encounter multiple profiles – try each option if needed
 - Close existing tabs per the step above when trying a new profile


Single Sign-On Error

- If you continue to receive a single sign-on error after attempting the steps above, please copy & paste the URL and email to DODD grant staff

Unknown Issue

If you receive a different error message or none of the steps above work, please take a screenshot & email to DODD grant staff

Navigating the DODD Grants Management System (GMS)

The Grants Management System will display pending items for your review on the homepage. It will display information regarding Grant Projects assigned to you. The  icon will bring you back to the homepage.

Budget Records for Review

This section of the homepage will show Budget Records assigned to the Grantee user that are **Awarded With Conditions** status.

Budgets Home Page View

Budget ID	Budget Name	Grant Year	Status
BGT-00000185	ADAMS	2021	Awarded with conditions
BGT-00000208	ADAMS Title XX	2021	Awarded with conditions
BGT-00000017	Stroup Transportation-Budget-2024	2022	Awarded with conditions
BGT-00000018	Adams CBDD-Budget-2021	2022	Awarded with conditions

Expense Records for Review

This section of the homepage will show Expense Records assigned to the Grantee and includes **In Progress** budget records.



only five records will be displayed on the landing page. Click **View All** to view more.

Expenses Home Page View

Expenses ID	Grant Year	Expense Status	Budget
EXPENSE-00015	2021	In Progress	BGT-00000043
EXPENSE-00029	2021	In Progress	BGT-00000105
EXPENSE-00088	2023	In Progress	BGT-00000015
EXPENSE-00089	2023	In Progress	BGT-00000012
EXPENSE-00091	2021	In Progress	BGT-00000106

[View All](#)

Accessing Budgets

Once a Grant Project is Approved and assigned to you as a Grantee, you will be able to find Budget Records associated with that Grant by selecting the Budgets Tab in GMS.

The screenshot shows the top navigation bar of the GMS interface. The 'Budgets' tab is highlighted with a red box. Below the navigation bar, there is a search bar and a 'Printable View' button. The main content area shows a list of budget records, with the first item being 'Adams County DD Test'.

Budget Search

The **Budgets** tab will display budget records assigned to you.

The screenshot shows a list of budget records in the GMS interface. The 'Budgets' tab is selected. The list contains 12 items, sorted by Grant Project Name. The first four items are visible in the table below.

	Grant Project Name ↑	Grantee	Grantee Name	Budget ID	Budget Name	Bu...	Record Type	Budg...	Created Date	Status
1	Adams County DD Test	GNT-0000020	ADAMS COUNTY BOAR...	BGT-000000...	Adams CBDD-Budget-2...	\$10,000	Budget Traditional	Traditional	7/2/2021, 12:43 PM	Approved
2	Adams DD Test	GNT-0000021	ADAMS COUNTY BOAR...	BGT-000000...	ADAMS COUNTY BOAR...	\$20,0...	Budget Traditional	Traditional	7/2/2021, 1:41 PM	Approved
3	ADAMS TEST Competitive	GNT-0000026	ADAMS COUNTY BOAR...	BGT-000000...	ADAMS COUNTY BOAR...	\$10,000	Budget Traditional	Traditional	7/2/2021, 3:08 PM	Approved
4	Competitive Test	GNT-0000011	ADAMS COUNTY BOAR...	BGT-00000015	Stroup Transportation-...	\$10,000	Budget Traditional	Traditional	6/15/2021, 12:36 PM	Approved

Click the arrow to see the available list views. These different views will filter your results and display applicable information. Select **Budgets Approved** to see a list of budget records for traditional and deliverable grants.

The screenshot shows the GMS interface with the 'Budgets' section active. A dropdown menu is open, showing various list views. 'Budgets Approved' is selected and highlighted with a red box. The main table displays a list of budget records with columns for Budget ID, Budget Type, Status, and Last Modified Date.

Budget ID	Budget Type	Status	Last Modified Date	
022	Deliverable	Approved	11/3/2021, 1:30 PM	
022	Traditional	Approved	10/26/2021, 1:28 PM	
022	Traditional	Approved	10/18/2021, 3:26 PM	
021	Traditional	Approved	10/13/2021, 6:27 AM	
021	Traditional	Approved	10/13/2021, 6:27 AM	
021	Traditional	Approved	10/13/2021, 6:27 AM	
021	Deliverable	Approved	10/28/2021, 2:50 PM	
021	Traditional	Approved	10/13/2021, 6:27 AM	
BGT-00000100	ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2022	Traditional	Approved	10/13/2021, 6:27 AM
BGT-00000065	ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2023	Traditional	Approved	10/13/2021, 6:27 AM
BGT-00000043	ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2021	Traditional	Approved	10/13/2021, 6:27 AM

Select **Budgets Awarded with Conditions** to view records that require additional edits prior to submitting to DODD for approval.

The screenshot shows the GMS interface with the 'Budgets' section active. A dropdown menu is open, showing various list views. 'Budgets Awarded with conditions' is selected and highlighted with a red box. The main table displays a list of budget records with columns for Budget ID and Status.

Budget ID	Status
022	Awarded with conditions
022	Awarded with conditions
022	Awarded with conditions
021	Awarded with conditions



There are several list views to select on the Budgets tab. These views contain different information on budget records, grants and their status.

Budgets
Budgets View (Trad & Deliverable) Printable View

21 items • Sorted by Budget Type • Filtered by All budgets - Status, Budget Type • Updated 4 minutes ago

Search this list...

Grant Project Name	Grantee	Budget ID	Budget Type	Status
1 Sole Source Deliverable Training	GNT-0000112	BGT-00000106	Deliverable	Approved
2 Deliverable Test	GNT-0000148	BGT-00000155	Deliverable	Submitted
3 Stroup Deliverable Grant	GNT-0000219	BGT-00000203	Deliverable	Awarded with conditions

Budget Records

Click on a **Budget ID** to view the budget record.

Grant Grants Budgets Expenses Grant, Budget, Expense Pete GMS

Budgets
Budgets View for Grantee Printable View

10 items • Sorted by Grant Project Name • Filtered by All budgets - Status • Updated a few seconds ago

Search this list...

Grant Project Name	Grantee	Budget ID	Budget Type	Status
1 Adams County DD Test	GNT-0000020	BGT-00000036	Traditional	Approved
2 Adams DD Test	GNT-0000021	BGT-00000037	Traditional	Approved
3 ADAMS TEST Competitive	GNT-0000026	BGT-00000042	Traditional	Approved
4 Competitive Test	GNT-0000011	BGT-00000015	Traditional	Approved
5 Competitive Test2	GNT-0000012	BGT-00000016	Traditional	Approved

Budget Types

Traditional Budgets and **Deliverable Budgets** are two common budget types in GMS. Budget records for your grants will be displayed on the homepage, click the **Budget ID** to open the record. The Budgets Home Page View will display budget name and status, to see more records and information, click the **Budgets** tab.

Ohio Department of Developmental Disabilities - Grants Management

Budget ID	Budget Name	Grant Year	Status
BGT-0000012	Stroup Transportation-Budget-2023	2023	Approved
BGT-0000013	Stroup Transportation-Budget-2024	2024	Approved
BGT-0000015	Stroup Transportation-Budget-2023	2023	Approved
BGT-0000016	Stroup Transportation-Budget-2023	2023	Approved
BGT-0000017	Stroup Transportation-Budget-2024	2024	In Progress

[View All](#)

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. A Deliverable grant provides grant dollars based on specific activities or milestones that are required to be met by the Grantee.


From the **Budgets** tab. Select the **Budgets View (Trad & Deliverable)** list view.

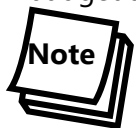
Review the **Budget Type** column to see if a Grant has a Traditional or Deliverable budget.

Grant Project Name	Grantee	Budget ID	Budget Type	Status
1 Deliverable Test	GNT-0000148	BGT-0000155	Deliverable	Submitted
2 Sole Source Deliverable Training	GNT-0000112	BGT-0000106	Deliverable	Approved
3 Indirect Cost File Test2	GNT-0000138	BGT-0000145	Traditional	Awarded with conditions
4 Indirect Cost File Test	GNT-0000137	BGT-0000144	Traditional	Approved
5 Modify Request	GNT-0000131	BGT-0000138	Traditional	Awarded with conditions

Budget records will be created by DODD and assigned to grantees. Open the budget record to see more information. The top of the record will display the **Budget Amount** and **Status** of the budget record.

 Budget Adams CBDD-Budget-2021			
Grant Project Name	Grantee Name	Budget Amount	Status
Sole Source 3	Adams CBDD	\$20,000.00	Approved

The Budget Amount shows the total funds available for the term of the grant. The Grant Categories for the budget are in the Grant Information section. To edit the budget or category amounts, click the  icon.



To edit budget information, the budget record status should be **Awarded With Conditions, Denied** or **Modification/Amendment In Progress**.

✓ Grant Information	
Grantee GNT-0000129	Grant Year 2021
Grant Start Date 8/9/2021	Grant End Date 12/31/2021
✓ Personnel	
Personnel \$10,000.00	YTD Personnel ⓘ \$0.00
Personnel % Remaining ⓘ 100.00%	Personnel Remaining ⓘ \$10,000.00

If a budget status is **Approved**, the grantee is ready to create and submit expense records.

Budget Status

Each budget record has a status. The status determines who can edit the budget record and whether expense records can be created and/or submitted.

Approved Budgets

You can view the status of a budget from the **Status** column under the Budgets tab. You can filter by Status to see **Approved**, **Denied**, and **Awarded with Conditions** budget records.

The screenshot shows the 'Budgets View for Grantee' interface. At the top, there are navigation tabs for 'Grants', 'Budgets', and 'Expenses'. A search bar is present with the text 'Grant, Budget, Expense'. Below the navigation, there is a 'Printable View' button and a search field for the list. The main content is a table with the following columns: Grant Project Name, Grantee, Budget ID, Budget Type, and Status. The Status column is highlighted with a red box, and the word 'Approved' is visible in the first four rows of the table.

Grant Project Name	Grantee	Budget ID	Budget Type	Status
1 Adams County DD Test	GNT-0000020	BGT-0000036	Traditional	Approved
2 Adams DD Test	GNT-0000021	BGT-0000037	Traditional	Approved
3 ADAMS TEST Competitive	GNT-0000026	BGT-0000042	Traditional	Approved
4 Competitive Test	GNT-0000011	BGT-0000015	Traditional	Approved
5 Competitive Test2	GNT-0000012	BGT-0000016	Traditional	Approved

Approved Budgets have been reviewed and approved by DODD Staff. A Grantee will be able to see Budget Records where they are assigned as a Grantee. An Approved Budget record needs no additional action from the Grantee or DODD.

Budgets 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.

Traditional Budgets

Budgets Awarded with Conditions are editable to grantee users. DODD Staff can use the **Awarded with Conditions** status to allow the assigned grantee to update Traditional Budget Category amounts.

Based on the Grant Categories selected, the total Grant Amount will be divided into Grant Categories:


Personnel – Staff

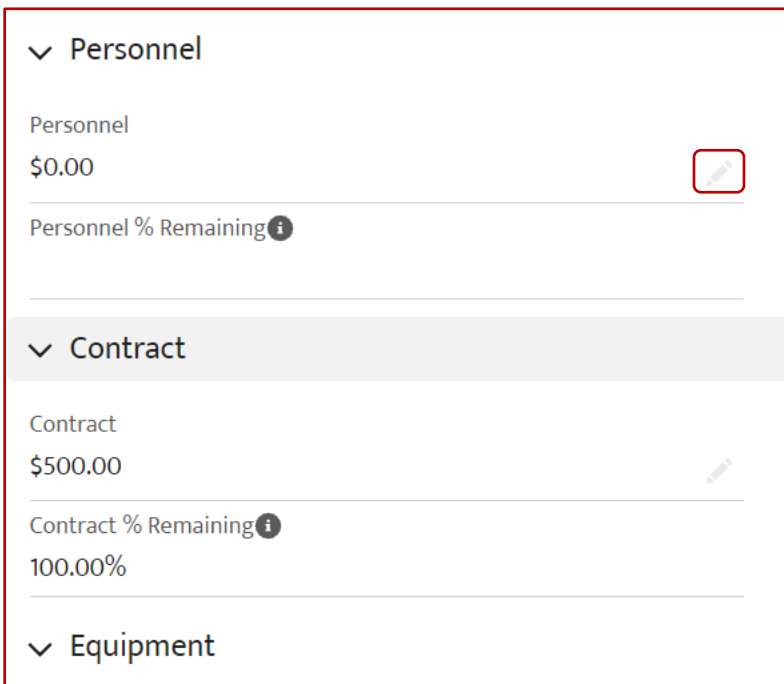
Contract – Work/activity provided through one or more contracts

Equipment – Equipment needed to complete work

Indirect Cost – Costs associated with the grant that cannot be directly allocated and follows a predetermined methodology.

Other Indirect Cost – Other costs and services anticipated during the lifecycle of the grant that don't fit in the categories above.

To edit the Grant Information for a budget record that's in the **Awarded with Conditions** status, click the icon  the category budget field.



The screenshot shows a list of budget categories: Personnel, Contract, and Equipment. Each category has a corresponding budget amount and a percentage remaining. The 'Personnel' category shows \$0.00 and 'Personnel % Remaining' with an information icon. The 'Contract' category shows \$500.00 and 'Contract % Remaining' at 100.00% with an information icon. The 'Equipment' category is partially visible. Small edit icons (pencil) are present next to the budget amounts for Personnel and Contract, and these icons are highlighted with red boxes in the original image.



Category budgets are editable in the **Awarded with Conditions** status, the **Budget Amount** will not be editable to the grantee. The total amount among all categories cannot exceed the Budget Amount.

✓ Budget Information

Budget ID BGT-00000145	Budget Amount \$1,000.00
Budget Name ⓘ ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2021	YTD Amount Spent ⓘ \$0.00

Enter dollar amounts in each applicable category. The categories for the budget are set by DODD staff. Once you are finished updating the category amounts, click **Save**.

✓ Personnel

Personnel 250.00	YTD Personnel ⓘ \$0.00
Personnel % Remaining ⓘ 100.00%	Personnel Remaining ⓘ \$250.00

Contract

Cancel Save

The record will update to show how much remains for each grant category in the **Personnel Remaining** field.

✓ Personnel

Personnel \$250.00	YTD Personnel ⓘ \$0.00
Personnel % Remaining ⓘ 100.00%	Personnel Remaining ⓘ \$250.00

Click **Add Files** to add files that justify the **Award Condition**. Clicking **Upload Files** will also work.

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

Grant Project Name: Sole Source w Conditions | Grantee Name: ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES | Budget Amount: \$5,000

Award Conditions w/ conditions, provide detail on drivers.

Budget Information

Budget ID	Budget Amount
BGT-00000043	\$5,000
Budget Name	YTD Amount Spent
ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2021	\$0.00
Budget Type	Amount Remaining
Traditional	\$5,000.00
Grant Category	Is Fixed Categories
Personnel	<input checked="" type="checkbox"/>

Status: Awarded with conditions

Files (0) [Add Files](#)

[Upload Files](#)

Or drop files

In the pop up that displays, click **Upload Files** to add files from your device. Click **Add** to include them in the budget record.

Upload Files

Select Files

Search Files...

Owned by Me

Shared with Me

Recent

Following

GMS bar
Oct 28, 2021 • 10KB • png

GMS bar
Oct 18, 2021 • 10KB • png

GMS bar
Oct 18, 2021 • 10KB • png

GMS bar
Oct 18, 2021 • 10KB • png

GMS bar
Oct 18, 2021 • 10KB • png

GMS bar
Oct 18, 2021 • 10KB • png

Submit
Oct 18, 2021 • 4KB • png

User Guide - GMS Navigation, Budget Records and Expe...
Oct 18, 2021 • 2.1MB • docx

GMS bar

0 of 10 files selected

Cancel Add

Once files have been uploaded or necessary changes have been made, click **Submit** on the Budget Record. This will send the updated Budget Record back to DODD Staff to review the files. DODD Staff will Approve or Deny the budget.

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

Grant Project Name: Sole Source w Conditions | Grantee Name: ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES | Budget Amount: \$5,000 | Status: Approved

DETAILS | ACTIVITY

Award Conditions: w/ conditions. provide detail on drivers. | Primary Contact: Pete GMS

Budget Information

Budget ID	Budget Amount
BGT-0000043	\$5,000
Budget Name	YTD Amount Spent
ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Budget-2021	\$0.00
Budget Type	Amount Remaining
Traditional	\$5,000.00
Grant Category	Is Fixed Categories
Personnel	<input checked="" type="checkbox"/>
	% Remaining
	100.00%

Personnel

Personnel	YTD Personnel
\$5,000	\$0.00

Budget Changes (0)

Expenses (1)

Expense Na...	Expense Stat...	Current Peri...	Year To Date ...
Sole Source w Conditions-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES-Expenses-20210708	In Progress	\$0.00	\$0.00

Files (2)


test excel	Approve but...
Jul 6, 2021 *...	Jul 6, 2021 *...

If a Budget Record is Awarded with Conditions, the details of the grant are viewable, but Expenses cannot be edited or submitted until the Budget Record is approved by DODD.

Indirect Cost

Costs that are incurred during the life of the grant that need to be included in the budget record can be added in the **Indirect Cost** category. The category will be added to the budget record. Indirect Costs can be added to expense records as they are created. Click on the link to **Indirect Cost** on the expense record to edit.

A screenshot of a web interface showing a list of Indirect Cost Expenses. The title is "Indirect Cost Expenses (1)". Below the title is a table with columns: Name, Rate, Amount, and Year To Date A... The first row contains the text "De Minimis" under the Name column. A red box highlights the "De Minimis" text. To the right of the table is a dropdown arrow. Below the table is a "View All" link.

Click the  icon to edit the Indirect Cost. From here add the amount incurred for the Indirect Cost and click **Save**.

A screenshot of the edit form for an Indirect Cost. The form has several fields: "Name" (De Minimis), "Expense" (EXPENSE-00090), "Indirect Cost Type" (De Minimis), "Rate", "Amount" (540.00), "Created By" (Pete GMS, 10/18/2021, 11:09 AM), and "Last Modified By" (Pete GMS, 10/18/2021, 11:40 AM). The "Amount" field is highlighted with a yellow background and a red border. At the bottom of the form are "Cancel" and "Save" buttons, with the "Save" button highlighted with a red border.

You can upload a file related to these costs by clicking **Upload Files**. Select the file(s) related to the Indirect Cost and click **Open**.

A screenshot of a file upload dialog box. At the top, there is a "File name:" field and a dropdown menu set to "All Files". Below these are "Open" and "Cancel" buttons, with the "Open" button highlighted with a red border. The main area of the dialog shows "Files (0)" and an "Add Files" button. At the bottom, there is a red-bordered "Upload Files" button with an upload icon, and the text "Or drop files" below it.

To go back to the expense record after uploading documents and saving the Indirect Cost, click the **Expense ID**.


EXPENSE MAIN	
Name	Expense
De Minimis	<u>EXPENSE-00090</u>


Click **Submit** on the expense record to add the Indirect Cost to the budget.


Upload Files on Indirect Cost

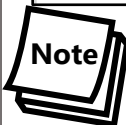
To include files related to Indirect Costs, click **Upload Files on Indirect Cost** on the budget record. An attachment will need to be included for indirect cost to submit the budget.

Other Direct Cost

Direct costs can be associated with any expense category in a budget record. These costs include services that may not be directly related to a Grant Category. To add a budget amount to other direct costs, click the  icon to edit the total for **Other Direct Cost**. Click **Save** to update.

Other Direct Cost	\$4,500.00		YTD Other Direct Cost	\$0.00
Other Direct Cost % Remaining	100.00%		Other Direct Cost Remaining	\$4,500.00

Other Direct Cost	
Other Direct Cost	YTD Other Direct Cost
4,500.00	\$0.00
Other Direct Cost % Remaining	Other Direct Cost Remaining
100.00%	\$4,500.00
	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	



When updating the budget amounts for **Indirect** or **Other Direct Costs**, click **Submit** to send to DODD Staff to review.



Budgets Denied

If DODD Staff denies a Budget Record, it will be sent back to the Grantee so they can make changes and resubmit. This may happen when conditions identified by DODD are not met by the Grantee. The **Budget Record** will show **Denied** in the **Budgets** tab.

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

Grant Budgets Expenses

Grant, Budget, Expense

Pete GMS

Budgets Budgets View for Grantee

Printable View

11 items • Sorted by Grant Project Name • Filtered by All budgets - Status • Updated a few seconds ago

Search this list...

Grant Project Name	Grantee	Budget ID	Budget Type	Status
1 Adams County DD Test	GNT-0000020	BGT-00000036	Traditional	Approved
2 Adams DD Test	GNT-0000021	BGT-00000037	Traditional	Approved
3 ADAMS TEST Competitive	GNT-0000026	BGT-00000042	Traditional	Approved
4 Competitive Test	GNT-0000011	BGT-00000015	Traditional	Approved
5 Competitive Test2	GNT-0000012	BGT-00000016	Traditional	Approved
6 Formula ADAMS	GNT-0000017	BGT-00000032	Traditional	Approved
7 Formula Stroup	GNT-0000009	BGT-00000014	Traditional	Approved
8 Sole Source Stroup Test	GNT-0000002	BGT-00000023	Traditional	Approved
9 Sole Source w Conditions	GNT-0000027	BGT-00000043	Traditional	Denied
10 Stroup Test Sole Source	GNT-0000000	BGT-00000012	Traditional	Approved
11 Stroup Test Sole Source	GNT-0000000	BGT-00000013	Traditional	Approved

Deliverable Budgets

Deliverable Grants are created with payments based on activities completed and milestones reached during the cycle for the Grant Project.

Unlike a traditional budget, deliverable grants include **Budget Deliverables/Services** instead of grant categories. DODD staff can add deliverables to a budget, these indicate how much money is budgeted for an expense and how often it is budgeted for. Click on a **Budget Deliverables Name** to review the deliverable.

Budget Delive...	Deliverable Am...	Deliverable Am...	Quantity
staff	<input checked="" type="checkbox"/>	\$8,000	4
training staff	<input checked="" type="checkbox"/>	\$2,000	5

Adding Deliverables to a Budget

To edit a deliverable budget, the budget record status will be **Awarded with Conditions** or **Pending Modification**. To create a new deliverable for the grant, click **New**.

Budget Delive...	Deliverable Am...	Deliverable Am...	Quantity
------------------	-------------------	-------------------	----------

In the popup box, add a **Budget Deliverable Name**, the budget ID associated with the deliverable will populate. To establish a fixed quantity or amount for the new deliverable, check the **Deliverable Amount Fixed** box. Adding **Quantity** will indicate how many instances of the deliverable will occur. The **Deliverable Amount** will be applied to the deliverable total in the budget record.



Deliverable Amounts will show the total dollar amount of the deliverable, if there are multiple quantities, the **Budget Deliverables/Services** will show the full amount anticipated for the deliverable.

New Budget Deliverables

Information

* Budget Deliverables Name

* Budget

Deliverable Amount Fixed

Quantity

Deliverable Amount

Deliverable Purpose

Budget Deliverables and Services

A deliverable will include a **Deliverable Amount** and a **Quantity**. Deliverable amounts can be fixed.

Fixed Deliverables

Amounts for Fixed Deliverables are static and don't change. Enter the quantity (such as "1" for a single Strategic Plan, or "3" for three completed trainings). Enter the total deliverable amount in the **Deliverable Amount** field. For example – if there will be five trainings billed at \$5,000 each – the **Quantity** will be 5 and the **Deliverable Amount** will be \$5,000. The **Amount Per Quantity** will be automatically calculated by GMS (in this case – it will equal \$1,000).

At Cost Deliverables

At Cost deliverables allow the grantee to enter any dollar amount for reimbursement– up to the deliverable amount. This allows for reimbursement of actual costs, as opposed to fixed payment amounts for deliverables completed.

To add deliverables to a budget, the grantee will be assigned a budget record in the **Awarded with conditions** status. In this status, the grantee can add deliverables to the current budget record.

To add dollar amounts to a deliverable, click the link to open the deliverable for editing.


Buttons: Edit, Submit, Create Expenses

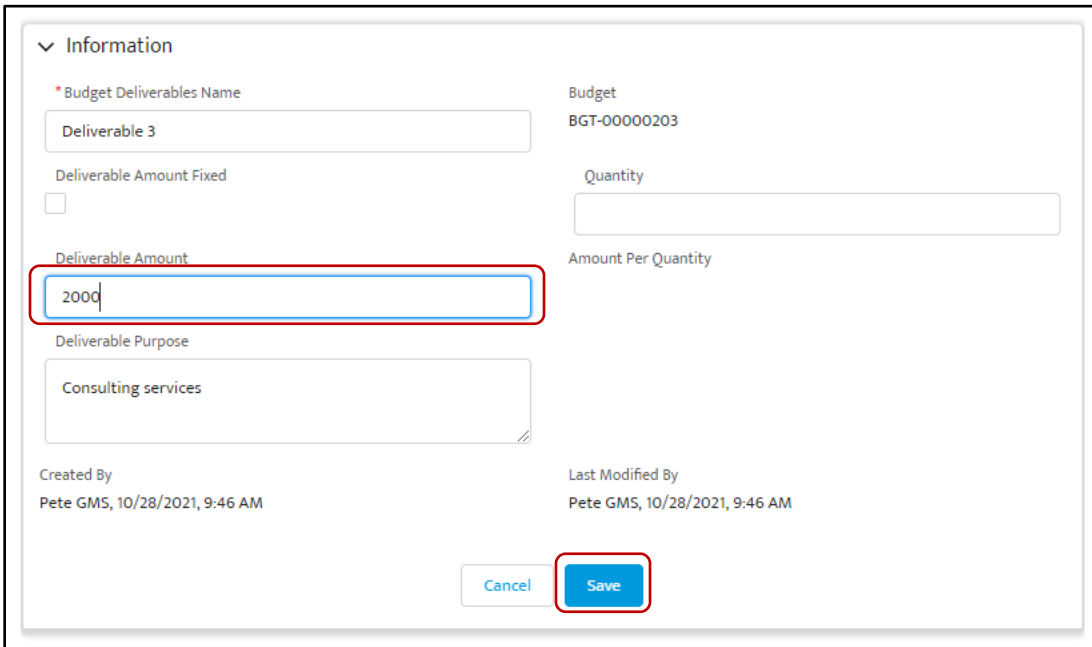
Budget Amount: \$10,000.00
Status: Awarded with conditions

Budget Deliverables/Services (3) [New]

Budget Delive...	Deliverable Am...	Deliverable Am...	Quantity
Deliverable 1	<input checked="" type="checkbox"/>	\$1,000	2
Deliverable 2	<input checked="" type="checkbox"/>	\$2,000	2
Deliverable 3	<input type="checkbox"/>		

View All

Click  on the deliverable record. The **Budget Deliverables Name** and **Deliverable Purpose** have been completed by DODD, enter the **Deliverable Amount**, and click **Save**.



Information

*Budget Deliverables Name: Deliverable 3

Budget: BGT-00000203

Deliverable Amount Fixed:

Quantity:

Deliverable Amount: 2000

Amount Per Quantity:

Deliverable Purpose: Consulting services

Created By: Pete GMS, 10/28/2021, 9:46 AM

Last Modified By: Pete GMS, 10/28/2021, 9:46 AM

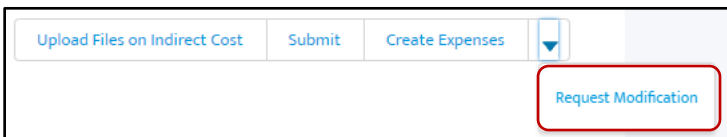
Buttons: Cancel, Save

Click **Submit** on the budget record to send the updated deliverables to DODD staff for approval. Once the budget record has been **Approved** the grantee can begin adding expenses related to the budget deliverables.

Budget Modification

Grantees can request a Budget Modification to update the status of a grant, change budget amounts and adjust a budget. Open a budget record in **Approved Status**.


Click the down arrow on the budget record and click **Request Modification**.



Buttons: Upload Files on Indirect Cost, Submit, Create Expenses, Request Modification

Request the modification by adding a note to DODD staff, click **Next** when you are finished.

Request Modification

* Purpose 

We would like to shift \$20,000 from the Personnel category to the Contract category,

Next

Once a request is submitted, DODD Staff will approve or deny the modification request. If approved the budget can be modified. Grantee would then follow the same steps as submitting a budget (identified earlier in this document).

Expenses

When reviewing a Budget Record, look for **Expenses** on the **DETAILS** tab of the Budget page. When the grantee is ready to request reimbursement from DODD, click **Create Expenses**.

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

Grant Project Name: Adams County DD Test
Grantee Name: ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES
Budget Amount: \$10,000
Status: Approved

DETAILS ACTIVITY

Budget Information

Budget ID	Budget Amount
BGT-00000036	\$10,000
Budget Name	YTD Amount Spent
Adams CBDD-Budget-2022	\$0.00
Budget Type	Amount Remaining
Traditional	\$10,000.00
Grant Category	Is Fixed Categories

Expenses (1)

Expense Na...	Expense Stat...	Current Peri...	Year To Date ...
Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES...	In Progress	\$0.00	\$0.00

When adding expenses to an Expense Record, click the link in an approved Budget Record to begin.

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

Grant Project Name: Adams County DD Test
Grantee Name: ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES
Budget Amount: \$10,000
Status: Approved

DETAILS ACTIVITY

Budget Information

Budget ID	Budget Amount
BGT-00000036	\$10,000
Budget Name	YTD Amount Spent
Adams CBDD-Budget-2022	\$0.00
Budget Type	Amount Remaining
Traditional	\$10,000.00
Grant Category	Is Fixed Categories

Expenses (1)

Expense Na...	Expense Stat...	Current Peri...	Year To Date ...
Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES...	In Progress	\$0.00	\$0.00

Alternatively, you can access an expense report by clicking on the **Expenses** tab in GMS. Click the arrow to see the available list views. These different views will filter your results and display applicable information. Click the **Expenses ID** link to view the report.

	Grant Project Name	Status	Budget	Gr...	Budge...
1	ES2021-Expenses... Sole Source Stroup Test	Payment Approv...	BGT-00000023	2021	\$10,000.00
2	Expenses-20210... Formula ADAMS	Payment Approv...	BGT-00000032	2021	\$20,000.00
3	S2022-Expenses... Adams County DD Test	Payment Approv...	BGT-00000036	2022	\$10,000.00
4	TIES2022-Expens... ADAMS TEST Competitive	Approved	BGT-000000...	2022	\$10,000.00
5	Expenses-20210... Formula ADAMS	Program Approved	BGT-00000032	2021	\$20,000.00
6	TIES2021-Expens... Sole Source w Conditions	In Progress	BGT-00000043	2021	\$5,000.00
7	021-Expenses-20... Sole Source Training	In Progress	BGT-00000105	2021	\$10,000.00
8	ISABILITIES2021-... Sole Source Deliverable Traini...	Submitted	BGT-00000106	2021	\$10,000.00
9	2021-Expenses-2... Indirect Cost File Test	Submitted	BGT-00000144	2021	\$1,000.00
10	-Expenses-20211... Competitive Test	In Progress	BGT-00000015	2023	\$10,000.00
11	EXPENSE-00089 Stroup Test Sole Source-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2023-Expenses...	In Progress	BGT-00000012	2023	\$2,000.00
12	EXPENSE-00090 TESTStroup-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20211018 TESTStroup	Approved	BGT-00000029	2022	\$15,000.00

Expense Record – Traditional Budgets

To begin adding expenses to a traditional budget, click **Create Expenses** at the top of the record.

Creating an expense record will allow you to begin entering expenses related to the grant categories established. Click **Finish** to create a new record.

The record will be shown in the **Expenses** section of the budget record. Click on the **Expense Name** to open it.

Expenses (1)				
Expense Name	Expense Status	Current Period ...	Year To Date To...	
Competitive Test-ADAMS COUNTY BOARD OF DEVELOPMENT... DISABILITIES20... Expenses- 20211014	In Progress	\$0.00	\$0.00	<input type="button" value="▼"/>

[View All](#)

Expense...	Expense S...	Current P...	Year To D...
Sole Source			
ADAMS COUNTY			
BOARD OF DEVELOPMENT			
DISABILITY SERVICES			
Expenses-20210701			

Traditional Grants are created with a total dollar amount for the Grant Project. In a Traditional Budget record, click **Create Expenses** to open a new **Expense Record** for the budget. If the expense record for a budget already exists, click the expense record to review and make edits. Based on the Grant Categories selected, the total Grant Amount will be divided into Grant Categories:

Personnel – Staff

Contract – Work/activity provided through one or more contracts

Equipment – Equipment needed to complete work, number of units.

Indirect Cost – Costs associated with the grant that cannot be directly allocated and follows a predetermined methodology.

Other Indirect Cost – Other costs and services anticipated during the lifecycle of the grant that don't fit in the categories above.

Some grant projects may have a Budget Tolerance that allows overspending in a category. However, total expenses cannot exceed the budget amount.

EXPENSE MAIN

General

* Name: Staff Expense: EXPENSE-00029

Include In This Period:

* Job Title: Staffing Needs

Current Period

Current Payroll Salary: \$2,000.00

Personnel

To create a new Personnel Expense, begin by clicking **Create Personnel**. Enter a **Name** for the Expense.

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

Grant Budgets Expenses

Grant, Budget, Expense

Pete GMS

Expense
Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20210702

Create Personnel Create Contract Create Equipment

Budget Amount \$10,000.00 Expense Status In Progress Grant Year 2022 Grant Year Start Date 7/2/2021 Grant Project Name Adams County DD Test

EXPENSE MAIN

Information

Expenses ID EXPENSE-00007
OAKS Supplier ID 0000056160
Payment Rejected Comments

Budget BGT-00000036
Grantee Name ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES

Files (0) Add Files

Upload Files
Or drop files

Personnel Expense (0)

Contract Expenses (0)

Create Personnel

*Name Expense 1 Expense EXPENSE-00007

Include In This Period

Job Title Current Payroll Fringe

Current Payroll Salary Current Grant Fringe

Current Grant Salary

Cancel Save

Complete the fields for the expense to add it to the Budget Record. If costs are included in the expense record, check **Include In This Period**.

Complete the remaining fields. Current Grant Salary and Current Grant Fringe should indicate the requested reimbursement amount from DODD. Current Payroll Salary and Current Payroll Fringe should indicate the total salary/fringe costs paid for the relevant employee, regardless of funding source.

Create Personnel


* Name <input type="text" value="Staff"/>	Expense EXPENSE-00089
<input checked="" type="checkbox"/> Include In This Period ?	
Job Title <input type="text" value="Driver"/>	
Current Grant Salary <input type="text" value="\$50,000.00"/>	Current Grant Fringe <input type="text"/>
Current Payroll Salary <input type="text" value="\$50,000.00"/>	Current Payroll Fringe <input type="text"/>

To edit this expense, click the link in the **Personnel Expense** table.

Personnel Expense (2)

Name	Include In This ...	Job Title	Total Payroll
Staff	✓	Staffing Needs	Current Salary: \$... ▼
Staff	✓	Staff 2	Current Salary: \$... ▼

[View All](#)

Click the  icon to begin editing.

Note: You can make updates to expenses while the Expense Record is **In Progress**. You can only create Expenses based on the budget amount for each category.

Uploading documents on a Personnel Expense

To upload files to an Expense Record, open an **In Progress** expense. The expense will have a **Files** section. Click **Upload Files**.

The screenshot shows the 'Expense Categories' section with a table:

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

Below the table is the 'EXPENSE MAIN' section with a 'General' tab. The 'Name' field is 'Expense' with the ID 'EXPENSE-00089'. The 'Include In This Period' checkbox is checked. The 'Job Title' is 'Driver'. To the right is a 'Files (0)' section with an 'Add Files' button and an 'Upload Files' button (highlighted with a red box) and a dashed box for dropping files.

Select the file(s) associated with the expense and click **Open**.

The screenshot shows a Windows file explorer dialog box. The 'File name' field contains 'Submit' and the file type is set to 'All Files'. The 'Open' button is highlighted with a red box.

After the files have been added, click the link to go back to the Expense Record.

The screenshot shows the 'Expense Record' interface. The 'Name' field is 'Job 1' with the ID 'EXPENSE-00095' (highlighted with a red box). The 'Files (1)' section shows one file: 'Submit', uploaded on 'Oct 26, 2021', with a size of '4KB' and type 'png'. There is a 'View All' link at the bottom right of the files section.

Click **Submit** at the top of the Expense Record to submit attachments and confirm updates to the expense.

Expense
Stroup Test Category-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20211026

Create Personnel Create Contract Create Equipment

Create Offset

Budget Amount/YTD Obligated Amount	Status	Expense Status	Grant Year	Grant Year Start Date
\$20,000.00	In Progress	In Progress	2022	10/26/2021

Submit

Contract

To create a new Contract Expense, begin by clicking **Create Contract**. Enter a **Name** for the Expense.

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

Grant Budgets Expenses

Expense
Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20210702

Create Personnel Create Contract Create Equipment

Budget Amount	Expense Status	Grant Year	Grant Year Start Date	Grant Project Name
\$10,000.00	In Progress	2022	7/2/2021	Adams County DD Test

Enter the requested reimbursement the amount field for the expense. If costs are included in the expense record, check **Include In This Period**. Enter a summary of the contract in the **Description** field. Click **Save** to add this expense to the budget record.

Create Contract

* Name
Contract 1

Expense
EXPENSE-00047

Include In This Period

Contract Description

Amount

Cancel Save

Uploading Files on a Contract Expense

To upload files to an Expense Record, open an **In Progress** expense. The expense will have a **Files** section. Click **Upload Files**.

The screenshot shows the 'Expense Categories' page for 'Job 1'. It displays a table with columns for 'Expense Category', 'Amount', and 'Year To Date Amount'. The 'Contract' category has an amount of '\$10,000.00'. Below the table is the 'EXPENSE MAIN' section. The 'Name' field is 'Job 1' and the 'Expense' field is 'EXPENSE-00095'. A 'Contract' dropdown is expanded, showing 'Include In This Period' (checked), 'Amount' (\$10,000.00), and 'Contract Description' (Work related to job). On the right, the 'Files (0)' section has an 'Add Files' button and an 'Upload Files' button highlighted with a red box. Below the 'Upload Files' button is the text 'Or drop files'.

Select the file(s) associated with the expense and click **Open**.

The screenshot shows a Windows File Explorer dialog box. The left pane shows the navigation pane with 'This PC', '3D Objects', 'Desktop', 'Documents', and 'Downloads'. The right pane shows the file 'Submit' selected. The 'File name' field contains 'Submit' and the file type is set to 'All Files'. The 'Open' button is highlighted with a red box.

After the files have been added, click the link to go back to the Expense Record.

The screenshot shows the 'Expense Record' interface after a file has been added. The 'Files (1)' section now shows one file: 'Submit', with a date of 'Oct 26, 2021', a size of '4KB', and a type of 'png'. Below the file list is a 'View All' link. In the 'EXPENSE MAIN' section, the 'Expense' field 'EXPENSE-00095' is highlighted with a red box.

Click **Submit** at the top of the Expense Record to submit attachments and confirm updates to the expense.

Expense
Stroup Test Category-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20211026

Create Personnel Create Contract Create Equipment

Create Offset

Budget Amount/YTD Obligated Amount	Status	Expense Status	Grant Year	Grant Year Start Date
\$20,000.00	In Progress	In Progress	2022	10/26/2021

Submit

Equipment

To create a new Equipment Expense, begin by clicking **Create Equipment**.

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

Grant Budgets Expenses

Expense
Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20210702

Create Personnel Create Contract **Create Equipment**

Budget Amount	Expense Status	Grant Year	Grant Year Start Date	Grant Project Name
\$10,000.00	In Progress	2022	7/2/2021	Adams County DD Test

Enter a **Name** for the Expense. Complete the **Number of Units** and **Amount** fields for the expense. The **Amount** should equal the total amount being requested for reimbursement across all units. If costs are included in the expense record, check **Include In This Period**. Click **Save** to add this expense to the budget record.

Edit Equipment

* Name: Equipment Expense: EXPENSE-00090

Include In This Period

* Number Of Units: 5

Amount: \$1,000.00

Created By: Pete GMS, 10/18/2021, 11:09 AM Last Modified By: Pete GMS, 10/18/2021, 11:09 AM

Cancel Save & New **Save**

Uploading Files on an Equipment Expense

To upload files to an Expense Record, open an **In Progress** expense. The expense will have a **Files** section. Click **Upload Files**.

The screenshot shows the 'Expense Categories' section for 'Equipment 1'. A table lists the expense category and amount:

Expense Category	Amount	Year To Date Amount
Equipment	\$1,000.00	

Below the table is the 'EXPENSE MAIN' section with the following details:

- Name: Equipment 1
- Expense: EXPENSE-00095
- Include In This Period:
- Number Of Units: 5
- Amount: \$1,000.00
- Created By: Pete GMS, 10/26/2021, 1:29 PM
- Last Modified By: Pete GMS, 10/26/2021, 1:29 PM

On the right side, there is a 'Files (0)' section with an 'Add Files' button and an 'Upload Files' button (highlighted with a red box). Below the upload button is the text 'Or drop files'.

Select the file(s) associated with the expense and click **Open**.

The screenshot shows a Windows File Explorer dialog box. The 'File name' field contains 'Submit' and the file type is set to 'All Files'. The 'Open' button is highlighted with a red box.

After the files have been added, click the link to go back to the Expense Record.

The screenshot shows the 'Expense Record' interface for 'Job 1'. The 'Expense' field is highlighted with a red box and contains 'EXPENSE-00095'. On the right side, the 'Files (1)' section shows a file named 'Submit' with a date of 'Oct 26, 2021', a size of '4KB', and a type of 'png'. A 'View All' link is visible at the bottom right of the files section.

Click **Submit** at the top of the Expense Record to submit attachments and confirm updates to the expense.

Expense
Stroup Test Category-ADAMS COUNTY BOARD OF DEVELOPMENTAL
DISABILITIES2022-Expenses-20211026

Create Personnel Create Contract Create Equipment

Create Offset

Budget Amount/YTD Obligated Amount	Status	Expense Status	Grant Year	Grant Year Start Date
\$20,000.00	In Progress	In Progress	2022	10/26/2021

Submit

Other Direct Costs

To add Other Direct Cost expenses to an expense record, open the **In Progress** expense to begin. Before adding expenses, check the **Budget Amount Other** field and **Amount Remaining** to confirm what is budgeted.

Other Direct Cost

Budget Amount Other
\$1,000.00

Current Period Total OtherDirect
\$0.00

Year To Date OtherDirect
\$0.00



Offset
\$0.00

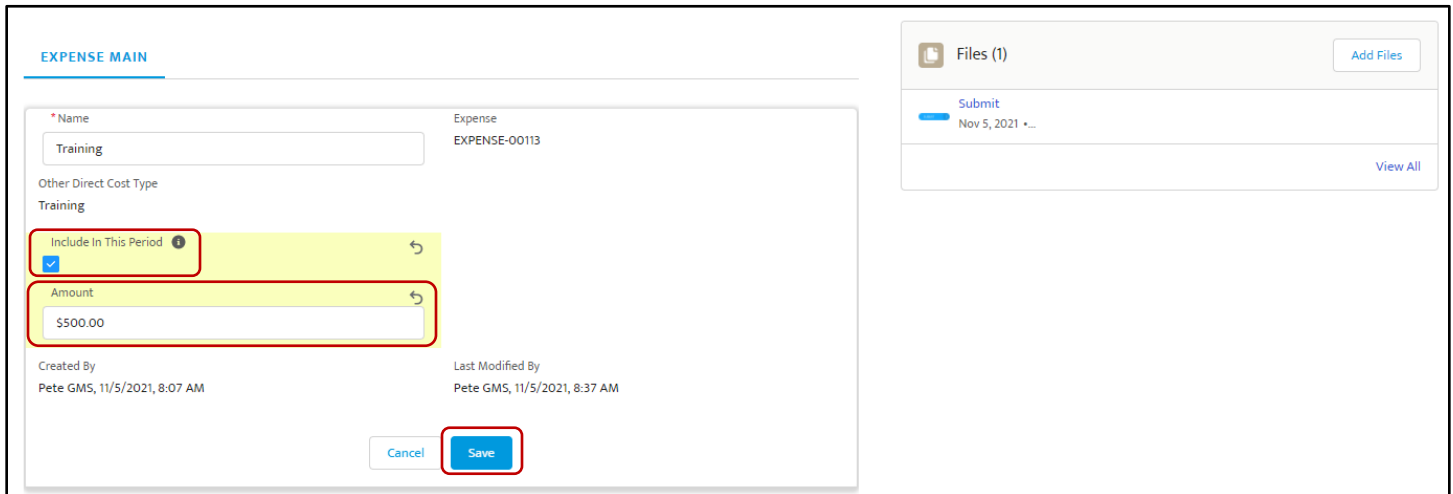
Amount Remaining % Remaining
\$1,000.00 100.00%

Select the expense in the **Other Direct Cost Expenses** table to update.

Other Direct Cost Expenses (6)

Name	Include In This ...	Amount	Year To Date A...
Utilities/Phone...	<input type="checkbox"/>		
Training	<input type="checkbox"/>		
Client Expense ...	<input type="checkbox"/>		
Other	<input type="checkbox"/>		

Edit the expense by clicking the  icon. Check **Include in this period** and enter the **Amount**. To upload documents related to this expense, click . When all the fields for the expense are complete, click **Save**.

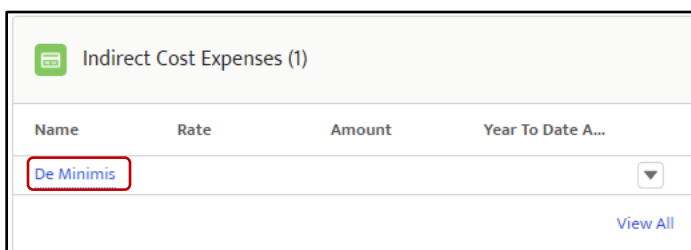


Indirect Costs


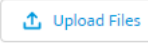
To add Indirect Costs to an expense record, open the **In Progress** expense to begin. Before adding expenses, check the **Budget Amount Indirect** field and **Amount Remaining** to confirm what is budgeted.

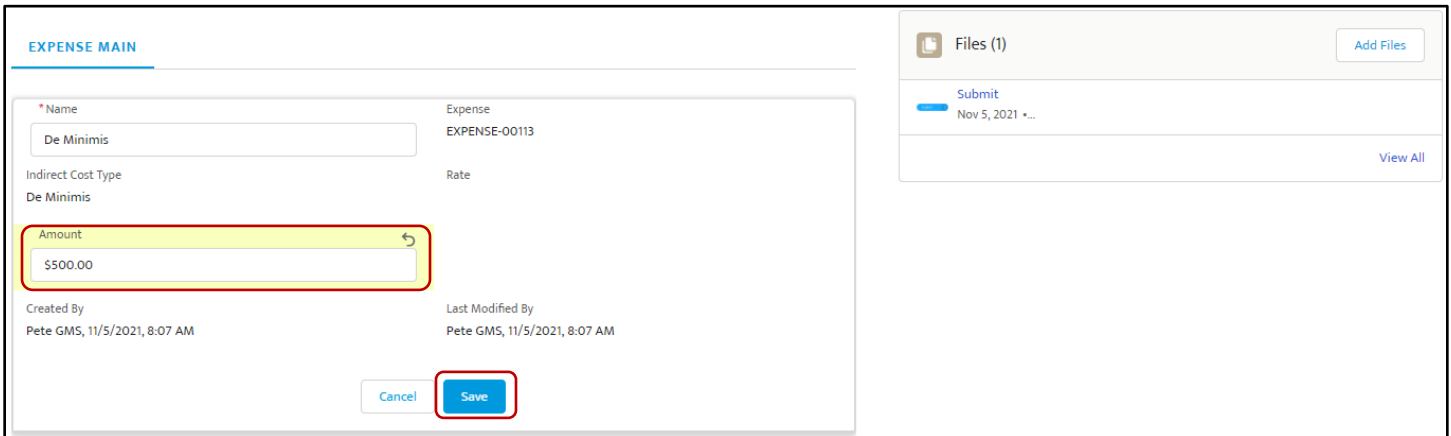


Select the expense in the **Indirect Cost Expenses** table to update.



Name	Rate	Amount	Year To Date A...
De Minimis			

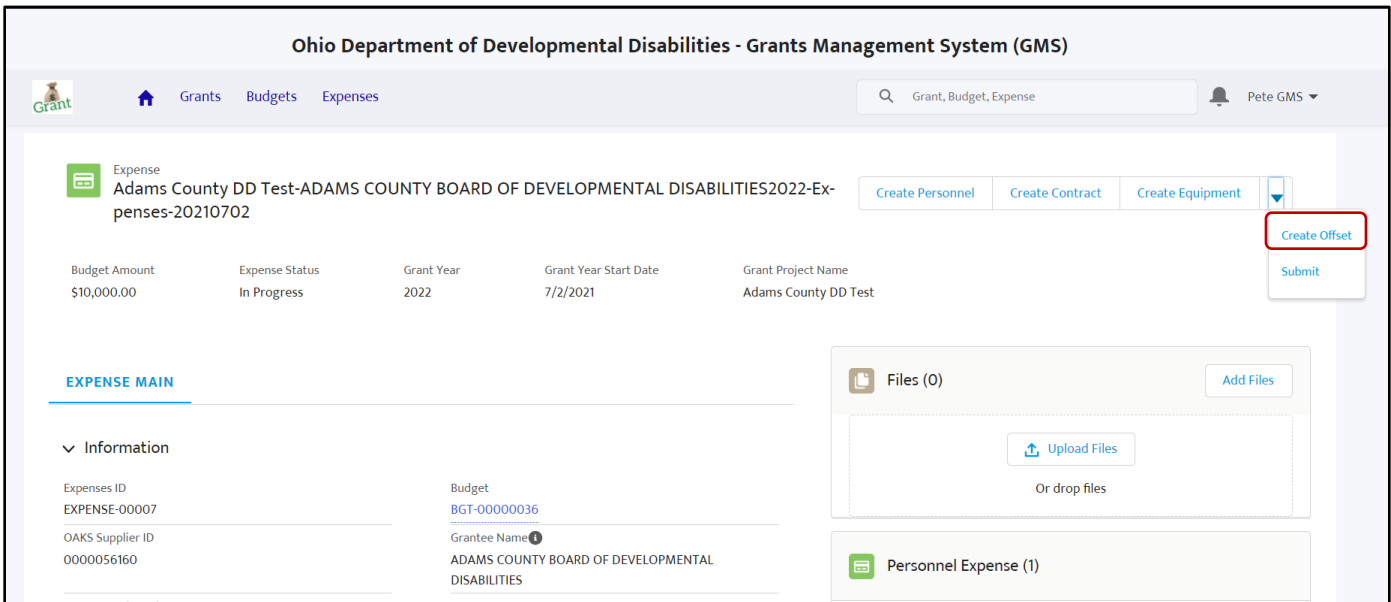
Edit the expense by clicking the  icon. Enter the **Amount**. To upload documents related to this expense, click . When all the fields for the expense are complete, click **Save**.



The screenshot shows the 'EXPENSE MAIN' form. The 'Name' field contains 'De Minimis' and the 'Expense' field contains 'EXPENSE-00113'. The 'Amount' field is highlighted with a red box and contains '\$500.00'. The 'Save' button is also highlighted with a red box. Other fields include 'Indirect Cost Type' (De Minimis), 'Rate', 'Created By' (Pete GMS, 11/5/2021, 8:07 AM), and 'Last Modified By' (Pete GMS, 11/5/2021, 8:07 AM). A 'Files (1)' section on the right shows a 'Submit' button with a date of 'Nov 5, 2021' and a 'View All' link.

Offset

To create an offset, click the arrow (down arrow) at the top of the Expense Record and click **Create Offset**.

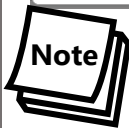


The screenshot shows the 'Ohio Department of Developmental Disabilities - Grants Management System (GMS)' interface. The expense record for 'Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20210702' is displayed. The 'Create Offset' button is highlighted with a red box. The record details include: Budget Amount (\$10,000.00), Expense Status (In Progress), Grant Year (2022), Grant Year Start Date (7/2/2021), and Grant Project Name (Adams County DD Test). The 'EXPENSE MAIN' section is expanded to show 'Information' with fields for Expenses ID (EXPENSE-00007), OAKS Supplier ID (0000056160), Budget (BGT-00000036), and Grantee Name (ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES). A 'Files (0)' section is also visible with an 'Upload Files' button and a 'Personnel Expense (1)' section.

Create a **Name** for your offset, select the **Category** the offset will apply to and enter the **Amount**. The category should be related to the Budget Categories already established.

Create Offset

<p>*Name</p> <input style="width: 90%;" type="text" value="Offset 1"/>	<p>Expense</p> <p>EXPENSE-00007</p>
<p>Category</p> <input style="width: 90%;" type="text" value="Indirect Cost"/>	<p>Reason</p> <input style="width: 90%;" type="text" value="offset"/>
<p>Amount</p> <input style="width: 90%;" type="text" value="\$500.00"/>	



To create an offset in a specific category, enter a positive or negative value. Entering a positive value (\$500) for **Indirect Cost** will increase the current period reimbursement amount by \$500. Entering a negative value (-\$500) for **Indirect Cost** will decrease the current period reimbursement amount by \$500.

To submit an expense, click the arrow (down arrow) at the top of the Expense Record and click **Submit**.

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

GrantGrants Budgets ExpensesGrant, Budget, ExpensePete GMS

Expense

Adams County DD Test-ADAMS COUNTY BOARD OF DEVELOPMENTAL DISABILITIES2022-Expenses-20210702

Budget Amount	Expense Status	Grant Year	Grant Year Start Date	Grant Project Name
\$10,000.00	In Progress	2022	7/2/2021	Adams County DD Test

EXPENSE MAIN

Information

Files (0)

Or drop files

Expense Record – Deliverable Budget

Deliverables will be added to a grant’s budget record. The selected budget deliverables and their deliverable amounts can be found in the **Budget Deliverables/Services** table.

Budget Delive...	Deliverable Am...	Deliverable Am...	Quantity
staff	<input checked="" type="checkbox"/>	\$8,000	4
training staff	<input checked="" type="checkbox"/>	\$2,000	5



Note If the **Is Fixed Deliverable** box is checked in the Budget Information, the Deliverables created are **fixed**, meaning the dollar amount per unit and number of units budgeted for will be the same and will not change.

Name
staff

Is Fixed Deliverable

Click **Create Expenses** in the budget record to open a new expense record. If the budget record already has open expenses, click the **In Progress** expense from the **Expenses** table.

Expense Name	Expense Status	Current Period ...	Year To Date To...
Sole Source Deliverable Training-ADAMS COUNTY BOARD OF DEVELOPMENT... DISABILITIES20... Expenses-20211018	In Progress	\$0.00	\$800.00

Click on a **Deliverable Expense** from the table to add expenses. The table will indicate the total amount budgeted for the deliverable and the total units budgeted for.

Name	Include In This ...	Deliverable Bud...	Total Allowed U...
training staff	<input type="checkbox"/>	\$2,000.00	5
staff	<input type="checkbox"/>	\$8,000.00	4

[View All](#)

After selecting a deliverable, the **Expense Information** will not be editable, these are established on the budget record. The **Deliverable Budget Amount** will show the total dollar amount budgeted for each deliverable. **Total Allowed Units** will show how many occurrences of the deliverable can be expensed across all expense records. **Amount Remaining** will indicate how much of the budget is still available for this deliverable. **Units Remaining** will show the available units that can be included on the expense record.

Expense Information

Expense: EXPENSE-00091
Budget Deliverables: staff

*Name: staff
Amount/Unit: \$2,000

Is Fixed Deliverable:
Support Documentation: ⓘ

Purpose: training staff

Current Period Information

Deliverable Budget Amount: \$8,000.00	Total Allowed Units ⓘ: 4
Current Period Expenses: \$0.00	Current Period No.Of Units: 0
Year To Date Amount: \$0.00	YTD No.Of Units: 0
Amount Remaining: \$8,000.00	Units Remaining: 4

Enter No.Of Units/Amount Based on Is Fixed Deliverable

Include In This Period ⓘ:

Quantity ⓘ: 2
Amount: 4,000.00

System Information

[Cancel](#) [Save](#)

To enter deliverable amounts and units, enter the number of units in the **Quantity** field. Click **Save** to add the expense.

Uploading documents for Deliverables

To add documentation for a deliverable to be paid, click on an **In Progress** expense record.

Expense Name	Expense Status	Current Period ...	Year To Date To...
Sole Source Deliverable Training-ADAMS COUNTY BOARD OF DEVELOPMENT... DISABILITIES20... Expenses-20211018	In Progress	\$0.00	\$800.00

In the expense record, select the deliverable to update and click the link from the **Name** column.

Name	Include In This ...	Deliverable Bud...	Total Allowed U...
training staff	<input type="checkbox"/>	\$2,000.00	5
staff	<input type="checkbox"/>	\$8,000.00	4

[View All](#)

Click to add the quantity or amount for the expense.

- For Fixed Deliverables: enter the **Quantity**.
- For At-Cost Deliverables: enter the **Amount**.

Reminder: Amounts for Fixed Deliverables are static and don't change. Enter the quantity (such as "1" for a single Strategic Plan, or "3" for three completed trainings). The reimbursement amount will automatically be calculated by GMS.

At cost deliverables allow the grantee to enter any dollar amount for reimbursement– up to the deliverable amount. This allows for reimbursement of actual costs, as opposed to fixed payment amounts for deliverables completed.

When you are finished, click **Save**.

Enter No.Of Units/Amount Based on Is Fixed Deliverable

Include In This Period ⓘ ↶

Quantity ⓘ ↶

Amount

System Information

Created By
Pete GMS, 10/18/2021, 4:06 PM

Last Modified By
Pete GMS, 10/18/2021, 4:06 PM

In the expense record, click **Upload Files**, you can select files from your device to upload, click **Open**.

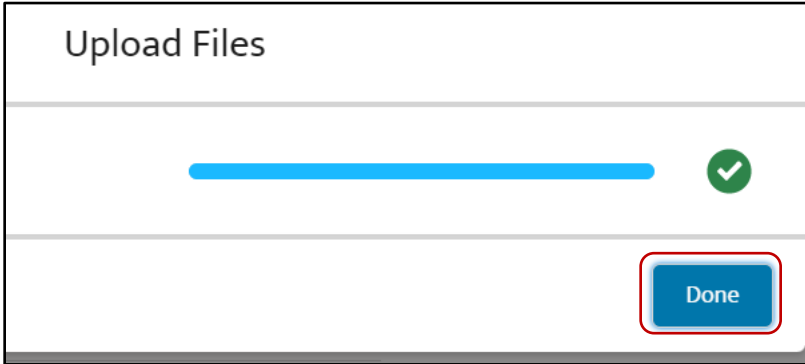
Files (0)

Or drop files

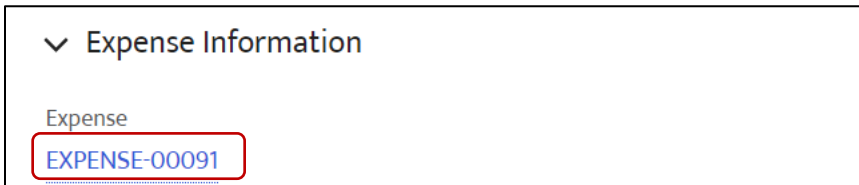
GMS bar Submit

name:

Click **Done** when you are finished uploading files related to the deliverable.

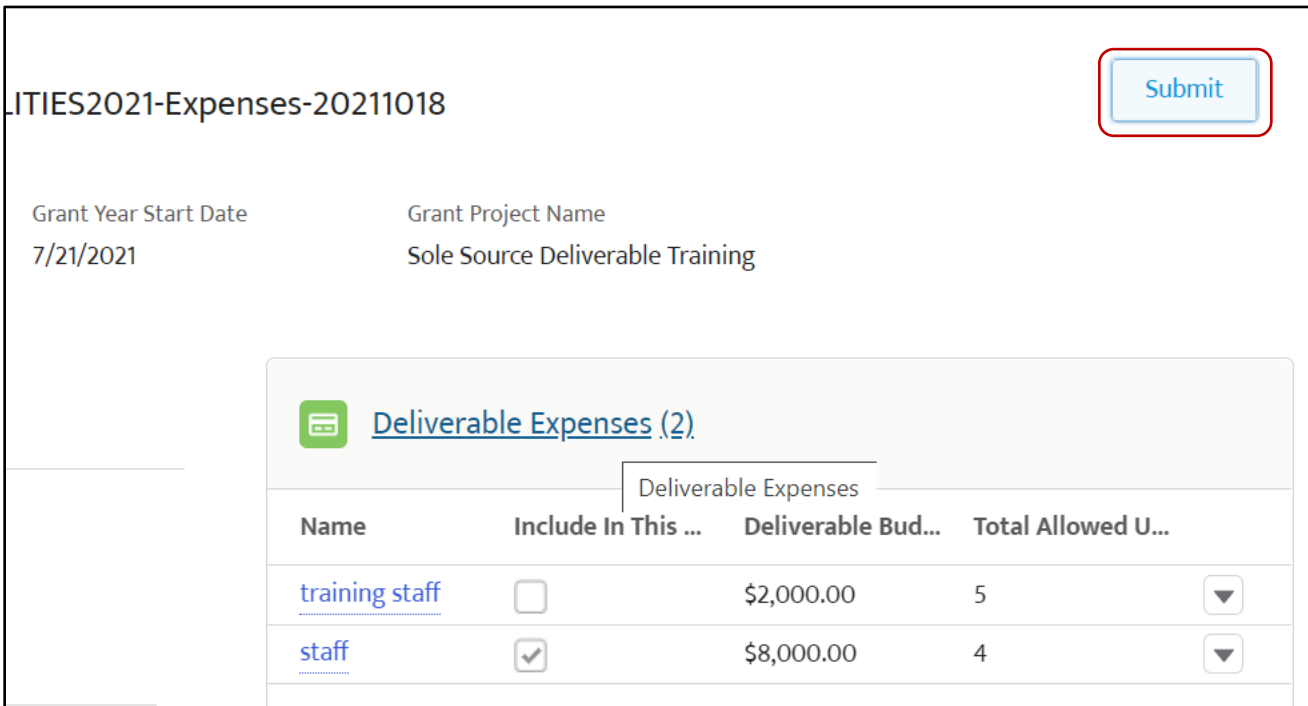


Go back to the expense record by clicking the link under **Expense Information**.



Submitting a Deliverable Expense

When you have finished updating the expense record, click **Submit**. This will send a notification to DODD that the expense is ready for review.



Your expense was updated successfully!

Expense "EXPENSE-00091" was saved.

The expense will show in the budget record as **Submitted**.

Expenses (2)

Expense Name	Expense Status	Current Period ...	Year To Date To...
Sole Source Deliverable Training-ADAMS COUNTY BOARD OF DEVELOPMENT... DISABILITIES20... Expenses- 20211018	Submitted	\$4,000.00	\$800.00 ▼



You can continue to update the expense and resubmit while it is in **Submitted** status.