
Funding Request User Guide

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Purpose

The following document outlines procedures for submitting federal funding requests to OHIOMHAS. Starting SFY 2012, OHIOMHAS has implemented an electronic (web-based) mechanism for drawing down federal dollars. This electronic system replaces the paper forms for all current federal funding requests used by boards and direct-funded providers who receive money from OHIOMHAS.

Contact Information

Please make sure and refer to this document first if you have questions regarding usage of the system. Any further questions that are not addressed by this document should be directed to:

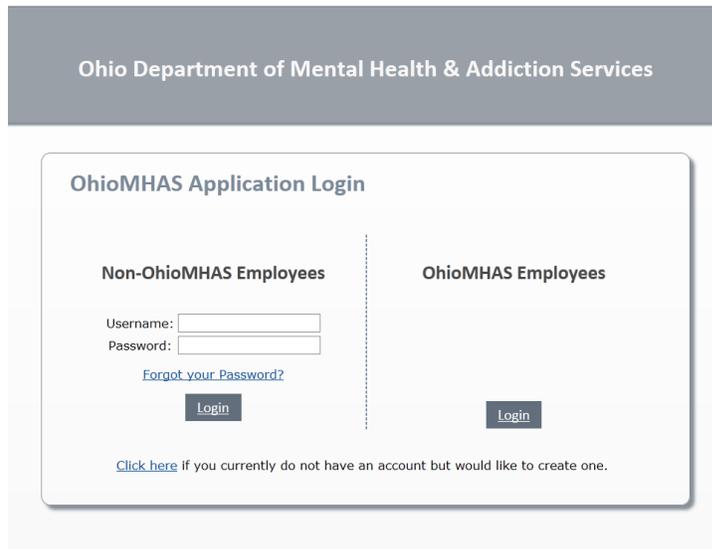
- For application support and assistance in completing and submitting request forms, contact Mary Kyle, at 614-466-6144, or email at Mary.Kyle@mha.ohio.gov or Nikki DeCamp, at 614-644-8422 or email at Nikki.DeCamp@mha.ohio.gov
- For errors and assistance with technical problems such as accessing the site, contact the OHIOMHAS Help Desk at helpdesk@mha.ohio.gov

Certification

All requests for federal funding should be submitted to OHIOMHAS by a fiscal agent granted authority by the board executive director of the agency making the request.

Accessing the Application

To access the application, go to <http://prod.ada.ohio.gov/>. This will take you to the website for the OHIOMHAS Turnstile which is a single-logon portal used to access all OHIOMHAS web applications. If you already have a login to any of the OHIOMHAS web applications such as BH, PIPAR, ATR, eDIP, or Board-Level Reporting, you can use your existing login to access the funding request site. However, you may still need to request access to the funding-request application.



The OHIOMHAS Turnstile Login Screen

Users Who DO NOT Have an Existing OHIOMHAS Login

Use the OHIOMHAS registrar to register a new user account. Do this ONLY if you do not have an existing account you already use to access another OHIOMHAS web application.

1. Go to <http://prod.ada.ohio.gov/> and click the link at the bottom of the page to create an account.
2. Follow the instructions on-screen to register a new account. You must have a valid email address that has not already been registered with a user account.
3. For detailed information on creating an account, click the documentation file at the top of the screen after accessing the registration site.
4. Your request to create an account will be processed by either someone at your agency who has the ability to grant access, or barring that, someone at OHIOMHAS will fill the request and notify you when it is complete. Once the account has been created and linked to the funding request application, follow the next set of steps below to login to the site.

Users with an Existing OHIOMHAS Login

Some user accounts were automatically given access to the funding request application. These user accounts were the active users who are listed as the fiscal managers for their respective organizations. To find out if you have access to the application:

1. Login to the turnstile web-portal by going to <http://prod.ada.ohio.gov/>
2. Input your username and password on the left-hand side of the screen. Remember passwords are case sensitive. If you forget your password, click on the “forgot password” link to reset it or contact the help desk.
3. Click the login link.
4. Choose “Production” as your environment. Alternatively, the “Training” environment can be used to test the functionality of the system. Ensure you choose “Production” when making actual funding requests. Data input into the training site will not be processed and may be deleted at any time.

5. Answer your challenge question. This question will only be asked when accessing the “Production” environment. This will be the question/answer combination that you created when you first setup your account. Three incorrect attempts at answering this question will lock you out of the system. If this has happened, or if you’ve forgotten your answer, you may contact OHIOMHAS for assistance.
6. A list of applications to which you have access should appear under the “Current Applications” section of the page.
 - a. If “Funding Requests” appears as an option, you have already been setup with access to the application. Click the link and you will be taken to the home page of the application.
 - b. If “Funding Requests” does not appear as an option, choose the option for “User Management” and follow the next set of instructions in order to link your account with the funding request application.



You currently do not have any phone numbers listed for your account. In order to allow the OhioMHAS Help Desk better to assist you, please add a phone number below.

Telephone Number: Ext.

ENVIRONMENT SELECTION

Select your desired environment:

CURRENT APPLICATIONS

<u>Application Name</u>	<u>Application Description</u>
<input type="button" value="SELECT"/> Community Funding	Funding the Community
<input type="button" value="SELECT"/> Funding Requests	Allows boards and direct funded providers to draw-down federal dollars
<input type="button" value="SELECT"/> Online Grants Application	Online Grant Application System
<input type="button" value="SELECT"/> PIPAR	Prevention Investment Planning and Reporting System (Data for FY 2011 and on)
<input type="button" value="SELECT"/> POPS	POPS
<input type="button" value="SELECT"/> Prevention	Web-Based Prevention System (FY2008 - FY2010 Data)
<input type="button" value="SELECT"/> State of Ohio Behavioral Health Directory	Maintains data on all of the certified providers and owners as well as boards, courts, etc.
<input type="button" value="SELECT"/> User Management 2.5	Manage users and roles at organizations. Also manage your own account, including password resets.

The application listing screen from the OHIOMHAS Turnstile

Linking an Existing User Account with the Funding Request Application

For users with existing accounts that do not have access to the funding request application, follow these steps:

1. Follow steps 1-6b in the above section entitled “Users who have an OHIOMHAS Login.” This will log you into the OHIOMHAS user management system.
2. Follow the “My Organization” link from the “Organization Management” option in the main menu.
3. Click the “Make New Request” button

4. Choose your appropriate organization type. For federally funded boards choose the “Board” option. For all other agencies, choose the “Owner” option.
5. Choose your organization name from the list. If your organization does not appear to be listed, ensure you are using the legal name registered as a business with the State of Ohio. If you still cannot find your organization’s name, contact OHIOMHAS.
6. Click the “Select Organization” button.
7. Check the box beside the “Funding Requests” application and click the “Submit Request” button at the bottom of the page.

Note Regarding Organization Types

When selecting an organization type from the list below, please note:

- For providers, you generally should select "Provider," "Recovery Service Provider," or "Driver Intervention Program" instead of "Owner" from the Organization Type list.
- For boards, please select Board.
- For OhioMHAS employees, please select Division or Governmental Organization.

Organization Type:	Board <input type="text"/>
Organization:	(25) The Franklin County Board of ADAMHS <input type="text"/>

Select the application(s) you would like access to:

- Access To Recovery - Access To Recovery Program - Years 2010 to 2014
- Board Level Reporting - Application allowing Boards to report their end-of-year expenditures to ODADAS
- CommunityPlan - Biennial Community Plans for boards.
- CPE - Certified Public Expenditures: certification of Medicaid 835s for AOD and Mental Health boards.
- CPE-2 - Production CPE-2
- Directory Audit Survey - Allows entities to update their organization contact information via an audit process.
- DocumentUpload
- Driver Intervention (eDIP) - Application to report indigent drivers for reimbursement by ODADAS as well as other data related to intervention occurrences.
- DrugFreeWorkplaceWeb - DrugFreeWorkplaceWeb description
- Funding Requests - Allows boards and direct funded providers to draw-down federal dollars
- GINA - Grants Integration Network Application - Mental Health Grant Application System
- OHBH - The Ohio Behavioral Health application collects client demographic for each episode of care.
- Online Grants Application - Online Grant Application System
- PIPAR - Prevention Investment Planning and Reporting Sytem (Data for FY 2011 and on)
- POPS - POPS
- Prevention - Web-Based Prevention System (FY2008 - FY2010 Data)
- SBIRT - Screening Brief Intervention and Referral Treatment

Organization Request Screen in User Management Application

This action will send a notification to the appropriate party to review and approve your request for access. The appropriate party will either be someone at your organization with the authority to grant access or someone at OHIOMHAS. Once your request is approved, you can login to the funding request application by following steps 1-6a in the above section entitled “Users who have an OHIOMHAS Login”

For more details on usage of the user management system, click the “Help” item in the main menu of that application.

Access at Multiple Agencies

If your user account has been granted access to the funding request application at more than one agency (not common), you will be prompted each time you login to the application as to the organization you wish to be aliased. Any time you wish to change the aliased organization, simply choose the “Home” link from the main menu.

Managing Funding Requests

There are three types of funding requests that can potentially be created:

- SAPT Funding Request – Money earmarked by OHIO MHAS as having come from the Federal Substance Abuse Prevention & Treatment Block Grant.
- Non-SAPT Funding Request – Money coming from federal sources that are not defined as either RSC or SAPT.

SAPT & RSC funds have special rules governing the disbursement and tracking of those funding types, so their request forms and business processes are slightly different than other federal funding, which is lumped into the third category called “Non-SAPT.”

Creating New Funding Requests:

1. Login to the application using the steps defined in the sections above.
2. If prompted to choose your organization type and organization, do so and click “Continue.” You will be taken to a page that lists all of the previous funding requests your organization has created.
3. Click the “Create New Funding Request” menu item and choose the appropriate option (either “SAPT” “Non-SAPT” or “RSC”). Note that you will only have access to create requests for funding when the agency in question has received funding of that type. For instance, if your agency has not received RSC funds, you will not have the option to request RSC funds available to you.

Federal Funding Requests

Home | Manage Funding Requests | View Reports | Logout

Logged In As: Mike Ullerup (The ADAMHS Board of Allen Auglaize & Hardin Counties)

Funding Requests

Create New Funding Request | Filter List

Viewing Requests For Fiscal Year: 2012

Current Filter Options: Fiscal Year: 2012
Agency: (02) The ADAMHS Board of Allen Auglaize & Hardin Counties

Date of Request	Total Amount Requested	Type of Request	Status	Action
Submitted 07/06/2011	\$0.00	Non-SAPT	Disbursed	Open
Submitted 07/06/2011	\$0.00	Non-SAPT	Disbursed	Open

The “Manage Funding Requests” screen

Viewing or Editing an Existing Funding Request

1. Login to the application using the steps defined in the sections above.
2. If prompted to choose your organization type and organization, do so and click “Continue.” You will be taken to a page that lists all of the previous funding requests your organization has created.
3. Find the funding request you wish to view or edit, and click the appropriate link under the “Action” column. Note that only requests that are in a draft or returned status can be modified.

By default, the system shows you all funding requests for your agency from the current fiscal year. If you wish to further filter the list to find a specific request, you can do so by clicking the “Filter List” option in the menu and choose the appropriate filter options.

You can return to this list at any time by clicking the “Manage Funding Requests” link from the main menu at the top of the page.

Creating Specific Funding Requests

For any of the specific funding types (SAPT, Non-SAPT, & RSC) follow the instructions in the above section to login to the system. Then follow these instructions to create the specific funding request:

SAPT Requests

SAPT requests indicate a request for funding where the funding source is the Federal Substance Abuse Prevention and Treatment Block Grant (Fund 3G40-Federal SAPT Block Grant)

1. Click the “Manage Funding Requests” link from the main menu.
2. Click the “Create New Funding Request” menu option from the toolbar.
3. Click the “Create SAPT Funding Request” from the resulting drop-down menu. This will take you to a blank SAPT funding

Federal SAPT Funding Request

Save As Draft
Submit Request
Go To List
Print

Fiscal Year: 2012 Quarter 1 - July through September

Request Form
 Request Status: Draft
 Date For Projected Expenses:

Program Area	Total SFY Award	Eligible This Qtr	Prior Qtr Expenses	Actual Expense			Projected Expenses	Total Cumulative Expenses	Adjustments To Awd	Disbursed To Date	Total Requested	Balance For This Qtr	Balance For SFY
				Jul	Aug	Sep							
Prevention													
2000C Per Capita Prevention	\$1,049,806.00	\$262,451.50	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$262,451.50	\$1,049,806.00
2010C UMADAOP	\$177,466.00	\$44,366.50	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$44,366.50	\$177,466.00
2020I Community Prevention	\$122,739.00	\$30,684.75	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$30,684.75	\$122,739.00
2030E Youth-Led Prevention	\$9,256.00	\$2,314.00	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$2,314.00	\$9,256.00
2030M Prevention Services	\$193,305.00	\$48,326.25	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$48,326.25	\$193,305.00
Prevention Total	\$1,552,572.00	\$388,143.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$388,143.00	\$1,552,572.00
Treatment													
2030G Circle for Recovery	\$54,493.00	\$13,623.25	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$13,623.25	\$54,493.00
2050C Per Capita Treatment	\$3,024,077.00	\$756,019.25	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$756,019.25	\$3,024,077.00
2060E Women's Treatment	\$1,243,977.00	\$310,994.25	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00	\$310,994.25	\$1,243,977.00
Treatment Total	\$4,322,547.00	\$1,080,636.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,080,636.75	\$4,322,547.00
Grand Total	\$5,875,119.00	\$1,468,779.75	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,468,779.75	\$5,875,119.00

Aggregate SAPT Award Information

Total SAPT Award	% Available	Available Award	Total Received To Date	Total Adjustments To Award	Balance Available For Request
\$5,875,119.00	100%	\$5,875,119.00	\$0.00	\$0.00	\$5,875,119.00

The “Federal SAPT Request” Form

The request form is comparable to the deprecated paper form with a few key differences. The web enabled form automatically populates fields based on the award given to your agency and calculates certain other fields based on user input. In addition, the online form will only populate awards that your agency has received for the given fiscal year. The following is a breakdown of each column, left to right on the SAPT form.

- a. Program Area (Populated Field) – The program area tied to the award.
- b. Total SFY Award (Populated Field) – This is the total amount the agency has been awarded for the fiscal year. This amount is static and should only change if a new notice of award is distributed.
- c. Eligible In Quarter (Calculated Field) – Based on 25% of the total award multiplied by the current quarter number. Example, in quarter #3, the agency is eligible for 75% of their total award ($25 * 3$)
- d. Prior Quarter Expenses (User Input) – This field is not enabled for a first quarter request and should populate with \$0.00. For the next three quarters, this is your prior quarter's expenses.
- e. Monthly Expenses (User Input) – Enter the actual expenses accrued through the appropriate period.
 - o You may not submit a request where monthly expenditures are being requested for a month that has not yet come (e.g. you may not report actual expenses for September in August).
- f. Projected Expenses (User Input) – Enter in your projected expenses for the appropriate time frame. See the restrictions section below for details.
 - o When a projected amount is indicated, the projection date (shown at the top of the form) is required.
 - o Projected expenses may not exceed 30 days in advance. Due to two weeks processing time, an advance of thirty days includes the month following the month in which the request is received by OHIOMHAS. The system will not let you submit a request where the projection date is greater than the last day of the month following that of the request (e.g. a request submitted in August may include projections through the end of September).
- g. Total Cumulative Expenses (Calculated Field) – A total of all user input for the current line (e+f)
- h. Adjustments To Award (Populated Field) – Represents any adjustments OHIOMHAS has made to the award due to overpayment, cash-reconciliation, board level reporting, SARS, etc. This amount is automatically tracked in the OHIOMHAS grants management database.
- i. Disbursed To Date (Populated Field) – Funds that the provider has received through the disbursement process.
- j. Total Requested (Calculated Field) – The total cumulative expenses minus adjustments minus the amount disbursed to date (g-h-i). If this amount is less than zero, zero is displayed
 - o You may not request a negative amount. However you may submit a form where zero is displayed as the total amount requested for any given line.
- k. Balance For the Quarter (Calculated Field) – Amount eligible in quarter minus all funds received to date minus adjustments minus the amount requested (c-h-i-j)
 - o You may not submit a request which would result in a negative balance for the quarter on any given line. The field will turn red to indicate there is a problem.
- l. Balance For The Fiscal Year (Calculated Field) – minus all funds received to date minus adjustments minus the amount requested (b-h-i-j)
 - o You may not submit a request which would result in a negative SFY balance on any given line. The field will turn red to indicate there is a problem.

In addition to the rules defined above, the following rules apply:

- The total requested amount for the form (displayed in the “Grand Total” line of the request form) must be greater than zero. If it is not, the field will turn red to indicate there is a problem.
- The total requested amount for the form (displayed in the “Grand Total” line of the request form) cannot be greater than the total SAPT balance available for request (displayed in the aggregate SAPT award information area below the request form). This is based on the percentage of SAPT funds available at any given time and is defined by OHIOMHAS. If this occurs, these two fields should turn red to indicate there is a problem.

Non-SAPT Requests

Non-SAPT requests encompass all other funding requests that are not SAPT or RSC.

1. Click the “Manage Funding Requests” link from the main menu.
2. Click the “Create New Funding Request” menu option from the toolbar.
3. Click the “Create Non-SAPT Funding Request” from the resulting drop-down menu. This will take you to a blank RSC funding request form

Federal Non-SAPT Funding Request

Save As Draft Submit Request Go To List Print

Fiscal Year: 2012

Request Form

Date Of Actual Expenses:

Date Of Projections:

Request Status: Draft

Program Area	Total SFY Award	Actual Expenses	Projected Expenses	Total Cumulative Expenses	Previously Disbursed	Adjustments To Awd	Total Requested	Balance For SFY
Fund 3H80-Federal Demonstration Grants 2010H SPF-SIG	\$150,000.00			\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00
Grand Total	\$150,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$150,000.00

The “Federal Non-SAPT Request” Form

The form pre-populates its rows from the funds received by the agency from all other federal sources. The following is a breakdown of each column, left to right:

- a. Program Area (Populated Field) – The program area tied to the award.
- b. Total SFY Award (Populated Field) – This is the total amount the agency has been awarded for the fiscal year. This amount is static and should only change if a new notice of award is distributed.
- c. Actual Expenses (User Input) – Enter the actual expenses accrued to date.
 - o Date of actual expenses (shown at the top of the form) is required when actual expenses are indicated on any line of the form.
 - o The date of actual expenses must be between the date indicated on the most recent request and the current date.
- d. Projected Expenses (User Input) – Enter in your projected expenses for the appropriate time frame. See the restrictions section below for details.
 - o When a projected amount is indicated, the projection date (shown at the top of the form) is required.
 - o Projected expenses may not exceed 30 days in advance. Due to two weeks processing time, an advance of thirty days includes the month following the month in which the request is received by OHIOMHAS. The system will not let you submit a request where the projection date is greater than the last day of the month following that of the request (e.g. a request submitted in August may include projections through the end of September).
- e. Total Cumulative Expenses (Calculated Field) – A total of all user input for the current line (c+d)
- f. Previously Disbursed (Populated Field) – Funds that the provider has received through the disbursement process. This is populated based on data indicated on previous Non-SAPT request forms
- g. Adjustments To Award (Populated Field) – Represents any adjustments OHIOMHAS has made to the award due to overpayment, cash reconciliation, board level reporting, SARS, etc. This amount is automatically tracked in the OHIOMHAS grants management database.

- h. Total Requested (Calculated Field) – The total cumulative expenses minus the amount previously disbursed minus adjustments (e-f-g). If this amount is less than zero, zero is displayed
 - o You may not request a negative amount. However you may submit a form where zero is displayed as the total amount requested for any given line.
- i. Balance For The Fiscal Year (Calculated Field) – This is the total SFY award minus the amount previously disbursed minus adjustments minus the amount requested (b-f-g-h)
 - o You may not submit a request which would result in a negative SFY balance on any given line. The field will turn red to indicate there is a problem.

In addition to the rules defined above, the following rules apply:

- The total requested amount for the form (displayed in the “Grand Total” line of the request form) must be greater than zero. If it is not, the field will turn red to indicate there is a problem.

Submitting Requests and Request Workflow

All requests for federal funds must be submitted to OHIOMHAS by the fifteenth (15th) of each month for processing within that month. Payment will be issued for the amount requested unless you are notified otherwise. Emergency or late requests will be considered on a limited case-by-case basis.

Requests of any type can be saved at any time, even with invalid data, by clicking the “Save Request” button at the top of the form. Once finished creating the draft of your request, click the “Submit Request” button at the top of the form. This will validate the form for any errors. If validation is successful, the form will be submitted to OHIOMHAS for processing. If unsuccessful, the system will display a yellow box at the top of the form indicating the problems that need to be fixed.

Please correct the item(s) shown below [\[Dismiss\]](#)

 Please correct the following errors

- Date for projections cannot be greater than 30 days in advance
- Date for actual expenditures is required when actual expenditures have been indicated.

Example Validation Message

When creating a request, ensure that you include all the funding needed across all program areas/awards indicated on the form because there may be only one outstanding request of any given type. If a request is still in draft or has been returned by OHIOMHAS for edits, it may be opened and edited. If the request has been submitted and is in review by OHIOMHAS, you may contact OHIOMHAS and have the request returned for edits to your organization. A funding request cannot be edited once it has been submitted for processing. If you try to create a request when one already is already pending (either in draft or being processed by OHIOMHAS), you will receive a message similar to the following:

Warning [\[Dismiss\]](#)

 A pending Non-SAPT request already exists for your agency. Please edit the existing request (if it is in draft) or request that ODADAS return the request to your agency.

Example Warning of existing pending funding request

If a request has been submitted and OHIOMHAS finds discrepancies in your request, it will be returned for edits. Once you have made the appropriate changes, you can resubmit your request for processing.

OHIOMHAS also has the ability to reject requests. When doing so, the request cannot be resubmitted. Whenever a request is returned by OHIOMHAS (either for edits or because of rejection) the OHIOMHAS federal funds coordinator is required to leave a message explaining the reason for the deviance. This is logged on the request form and sent via email to whoever made the original request.