

---

# Grants & Funding Management System (GFMS): **Allocation Applications**

# **ODADAS & ODMH Consolidation**

---

## **BACKGROUND**

In July 2013, the former ODADAS and ODMH consolidated to form one state agency:

**Ohio Department of Mental Health &  
Addiction Services  
OhioMHAS**

# POPS, OLGA & Community Funding

---

- ODADAS and ODMH historically used several web applications or paper processes for awarding funds to Boards and providers (e.g., OLGA, POPS, Community Funding Database)
- Post-consolidation, OhioMHAS saw the opportunity to create an integrated web application for the combined agency: **GFMS**

# SFY 2017 GIFA and Allocation Guidelines

---

The SFY 2017 Grant Information for Applicants (GIFA) and Allocation Guidelines information is posted on the OhioMHAS website at:

<http://mha.ohio.gov/Default.aspx?tabid=147>

and

<http://mha.ohio.gov/Default.aspx?tabid=500>

# OhioMHAS Project Lead Contact Information

---

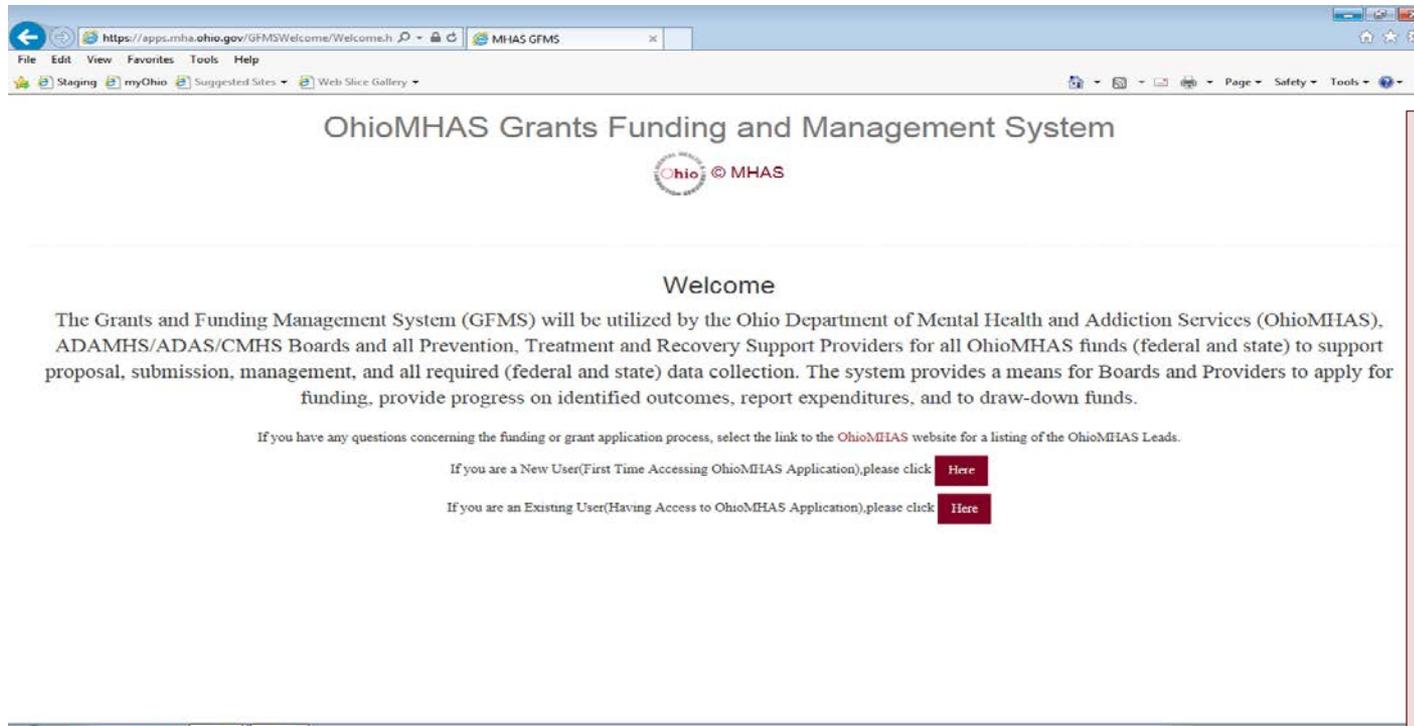
If you have questions about the grant or allocation application process, please contact Tammy Payton, OFCF Project Lead at 614-752-4044 or via email at [Tammy.Payton@mha.ohio.gov](mailto:Tammy.Payton@mha.ohio.gov).

Additional funding and Project Lead contact information is posted on the OhioMHAS website at: <http://mha.ohio.gov/Default.aspx?tabid=500>

# How to Obtain a New User Account

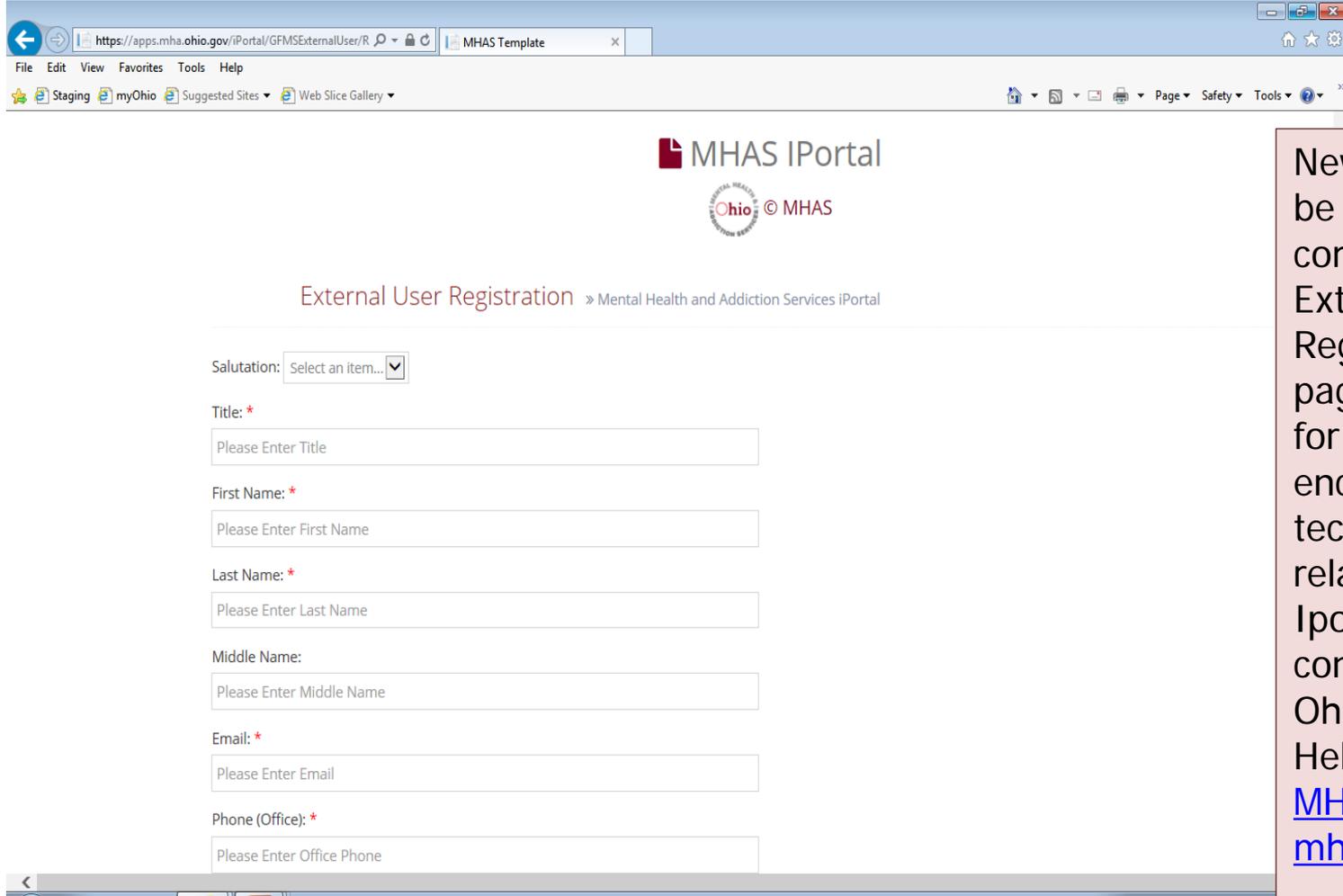
Open your web browser to:

<https://apps.mha.ohio.gov/GFMSWelcome/Welcome.html>



Select the link for New User OR Existing User. Existing Users are those FCFCs that received FY16 grant funding from OhioMHAS via the POPS system (i.e., Strong Families or ENGAGE grant).

# New User Registration in IPortal

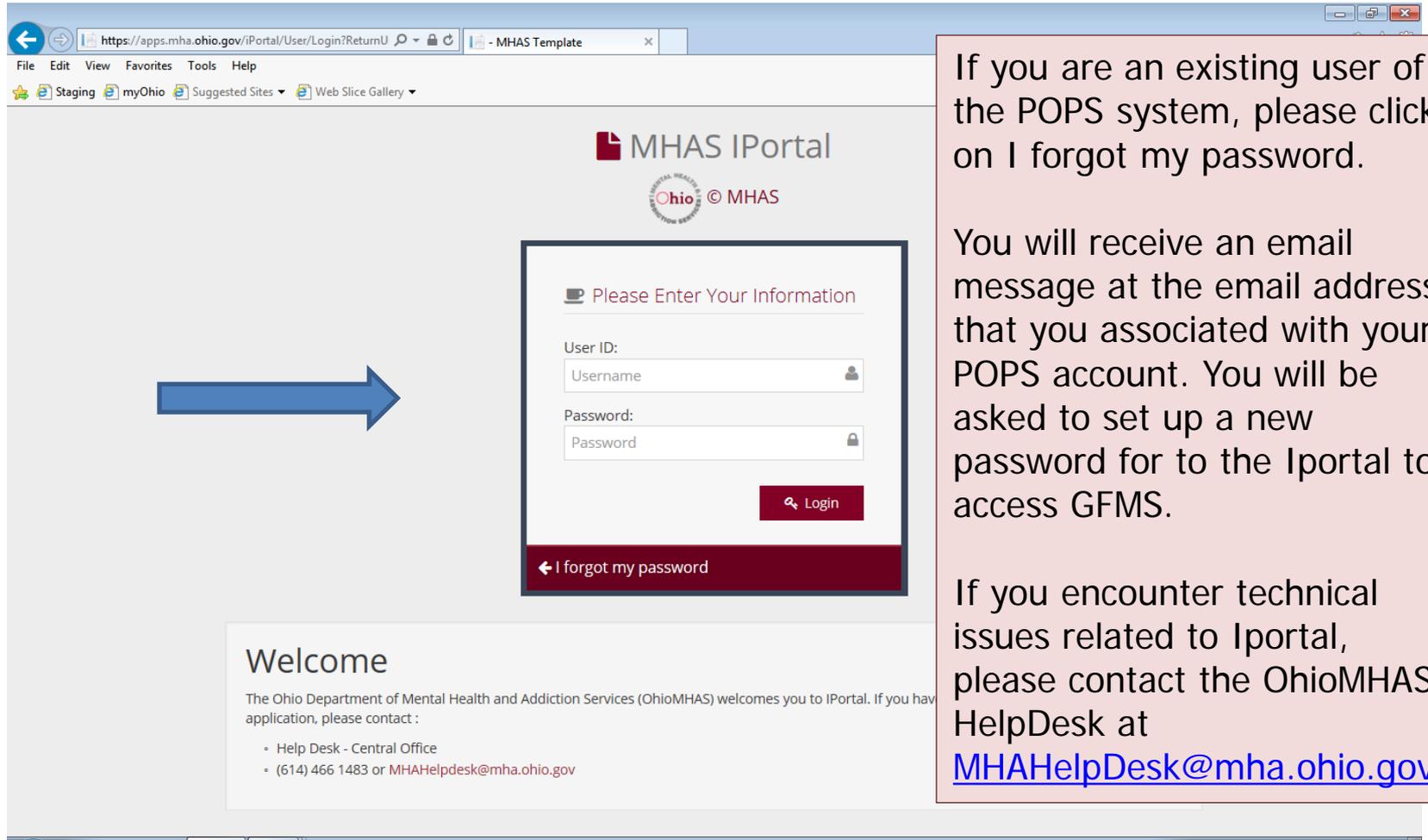


The screenshot shows a web browser window with the URL <https://apps.mha.ohio.gov/IPortal/GFMSExternalUser/R>. The page title is "MHAS IPortal" and the logo for "Ohio MHAS" is displayed. The breadcrumb trail reads "External User Registration » Mental Health and Addiction Services IPortal". The registration form includes the following fields:

- Salutation:
- Title: \*
- First Name: \*
- Last Name: \*
- Middle Name:
- Email: \*
- Phone (Office): \*

New Users will be required to complete the External User Registration page to register for GFMS. If you encounter technical issues related to Iportal, please contact the OhioMHAS HelpDesk at [MHASHelpDesk@mha.ohio.gov](mailto:MHASHelpDesk@mha.ohio.gov).

# Current User Log-In to IPortal



If you are an existing user of the POPS system, please click on I forgot my password.

You will receive an email message at the email address that you associated with your POPS account. You will be asked to set up a new password for to the Iportal to access GFMS.

If you encounter technical issues related to Iportal, please contact the OhioMHAS HelpDesk at [MHAHelpDesk@mha.ohio.gov](mailto:MHAHelpDesk@mha.ohio.gov).

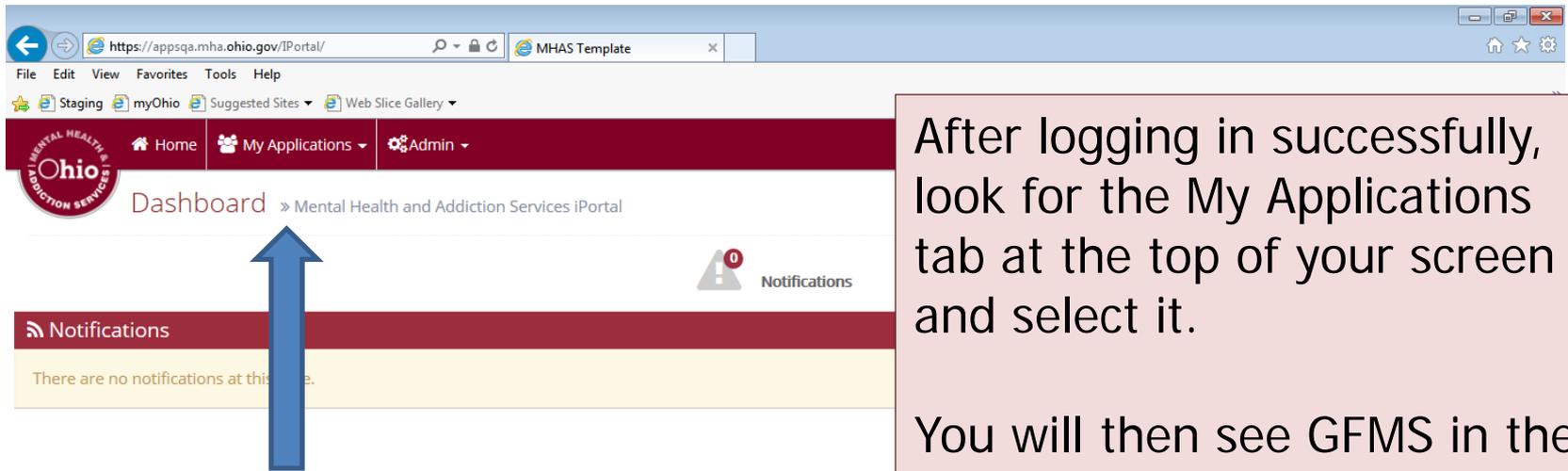
# Saving an in-progress application

---

If there are any incomplete required fields on any application pages, the following message will appear at the bottom of the page:

Validation errors were found. Fix them above or [CLICK HERE](#) to continue your application and come back to fix these changes later.

# Viewing the Dashboard



After logging in successfully, look for the My Applications tab at the top of your screen and select it.

You will then see GFMS in the options menu. Select GFMS.

# Open an application that has already been created

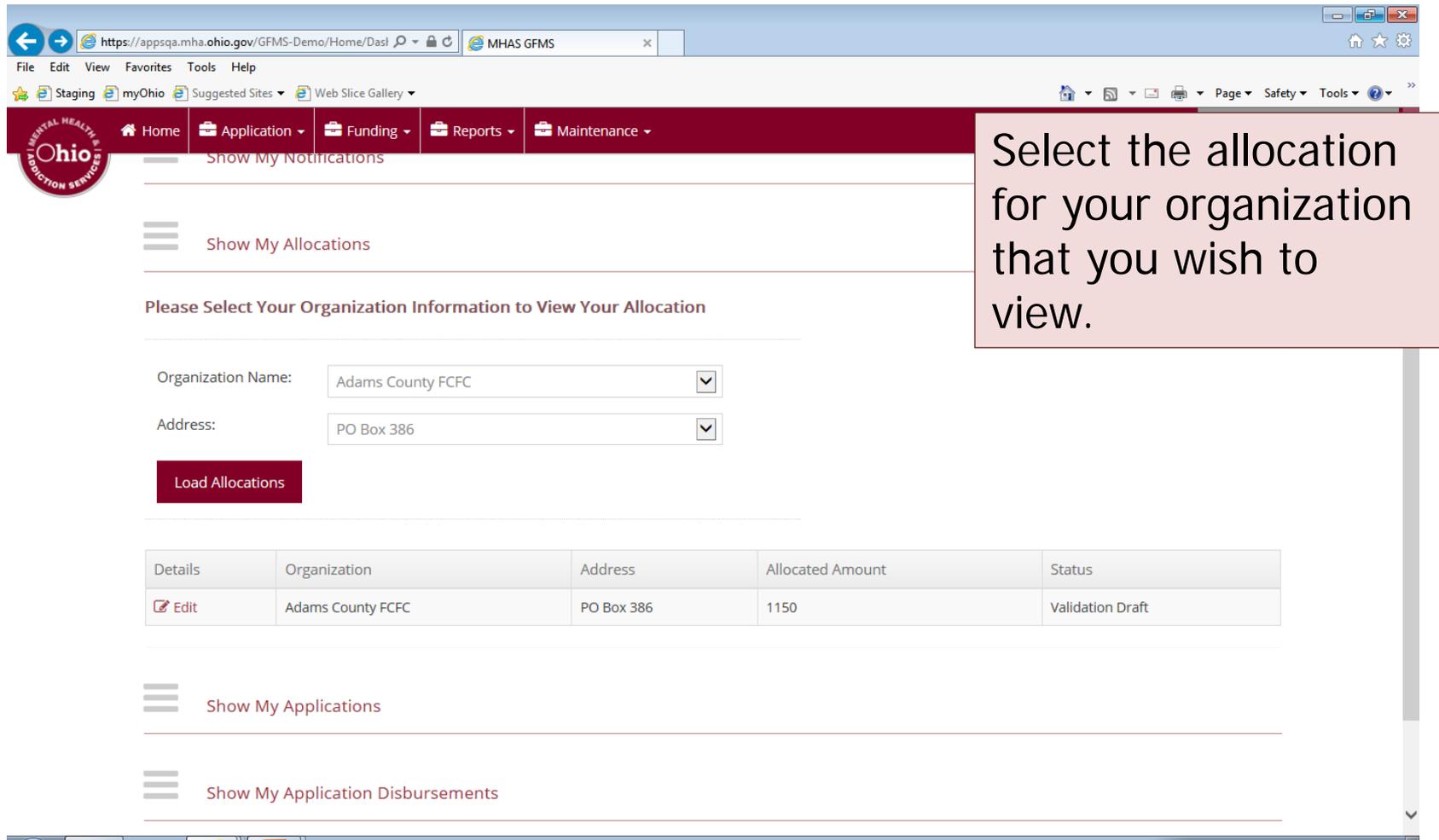
Dashboard » Grants And Funding Management System

- Show My Notifications
- Show My Allocations
- Show My Applications
- Show My Application Disbursements
- Show My Allocation Disbursements

To open an allocation application that has already been created, select the Show My Applications option.

You will be prompted to select your organization and address from a dropdown menu. A list of your allocations will populate in a table.

# Open an application that has already been created, con't



https://appsqa.mha.ohio.gov/GFMS-Demo/Home/Dasi

MHAS GFMS

File Edit View Favorites Tools Help

Staging myOhio Suggested Sites Web Slice Gallery

Home Application Funding Reports Maintenance

Show My Notifications

Show My Allocations

Please Select Your Organization Information to View Your Allocation

Organization Name: Adams County FCFC

Address: PO Box 386

Load Allocations

Details	Organization	Address	Allocated Amount	Status
<input checked="" type="checkbox"/> Edit	Adams County FCFC	PO Box 386	1150	Validation Draft

Show My Applications

Show My Application Disbursements

Select the allocation for your organization that you wish to view.

# Create a New Allocation

The screenshot shows a web browser window with the URL <https://appsqa.mha.ohio.gov/GFMS-Demo/Home/Dash>. The browser's address bar and menu bar are visible. The application's navigation menu is open, showing options: Home, Application, Funding, Reports, and Maintenance. The 'Application' dropdown menu is expanded, listing 'New Grant Application', 'New Allocation Application', and 'Search Grant Applications'. A blue arrow points to the 'New Allocation Application' option. Below the menu, there are several notification or status bars, each with a hamburger menu icon and text: 'Show My Notifications', 'Show My Allocations', 'Show My Applications', 'Show My Application Disbursements', and 'Show My Allocation Disbursements'. A text box on the right side of the screenshot contains the following text: 'To create a new allocation application, go to the Application tab and select New Allocation Application. You will then be taken to the Allocation Face Sheet in which you will enter organizational and basic information about the allocations you are applying for.' At the bottom of the browser window, the address bar shows the URL <https://appsqa.mha.ohio.gov/GFMS-Demo/Application/CreateAllocation>.

# Allocation Face Sheet

The screenshot shows a web browser window with the URL <https://appsqa.mha.ohio.gov/GFMS-Demo/Allocation/>. The browser's address bar shows 'GFMS'. The page has a dark red navigation bar with the Ohio MHAS logo and menu items: Home, Application, Funding, Reports, and Maintenance. Below the navigation bar, the page title is 'Allocation Face Sheet' with a breadcrumb trail '» Grants And Funding Management System'. The main content area contains three required fields, each marked with a red asterisk: 'Organization: \*' with a 'Select...' dropdown, 'Location Address: \*' with a 'Select...' dropdown, and 'State Fiscal Year: \*' with a 'Select...' dropdown and a small downward arrow. A dark red 'Create' button is positioned below the fields. On the left side of the page, there is a sidebar with a 'GFMS' header and a red 'ALLOCATION' dropdown menu. Under the 'ALLOCATION' menu, 'Allocation Face Sheet' is selected and highlighted with a red border.

Complete the Face Sheet. The fields with red asterisks throughout the application are required fields.

The Organization Name will be your county name + FCFC and Location Address should be your Administrative Agents address. If your FCFC is not listed please contact Tammy Payton via email at [Tammy.Payton@mha.ohio.gov](mailto:Tammy.Payton@mha.ohio.gov)

Click Create.

# Allocation Face Sheet, con't

Allocation Face Sheet » Grants And Funding Management System

Organization: \* Murtis Taylor Human Services System

Location Address: \* 11410 Buckeye Road

State Fiscal Year: \* 2016

Mailing Address: \* 13422 Kirsman Road test

Primary Contact First Name: \* Patsy

Primary Contact Last Name: \* Inman

Primary Contact Phone Number: \* (614) 528-9632

Primary Contact Email Address: \* pi@gmail.com

Secondary Contact First Name: Dianna

Secondary Contact Last Name: Hill

Secondary Contact Phone Number: (614) 852-9654

Secondary Contact Email Address: 111222@12.com

Fiscal Officer First Name: \* James

Fiscal Officer Last Name: \* Hill

Fiscal Officer Phone Number: \* (614) 254-8525

Fiscal Officer Email Address: \* jameshill@ohio.mha.gov

The page will update and require you to enter additional information about your organization.

**Mailing Address** – Select the mailing address (this address will be populated based off the information the applicant listed as their address when registering for the user name and password and may be the same as your location address in step i. above on page 18).

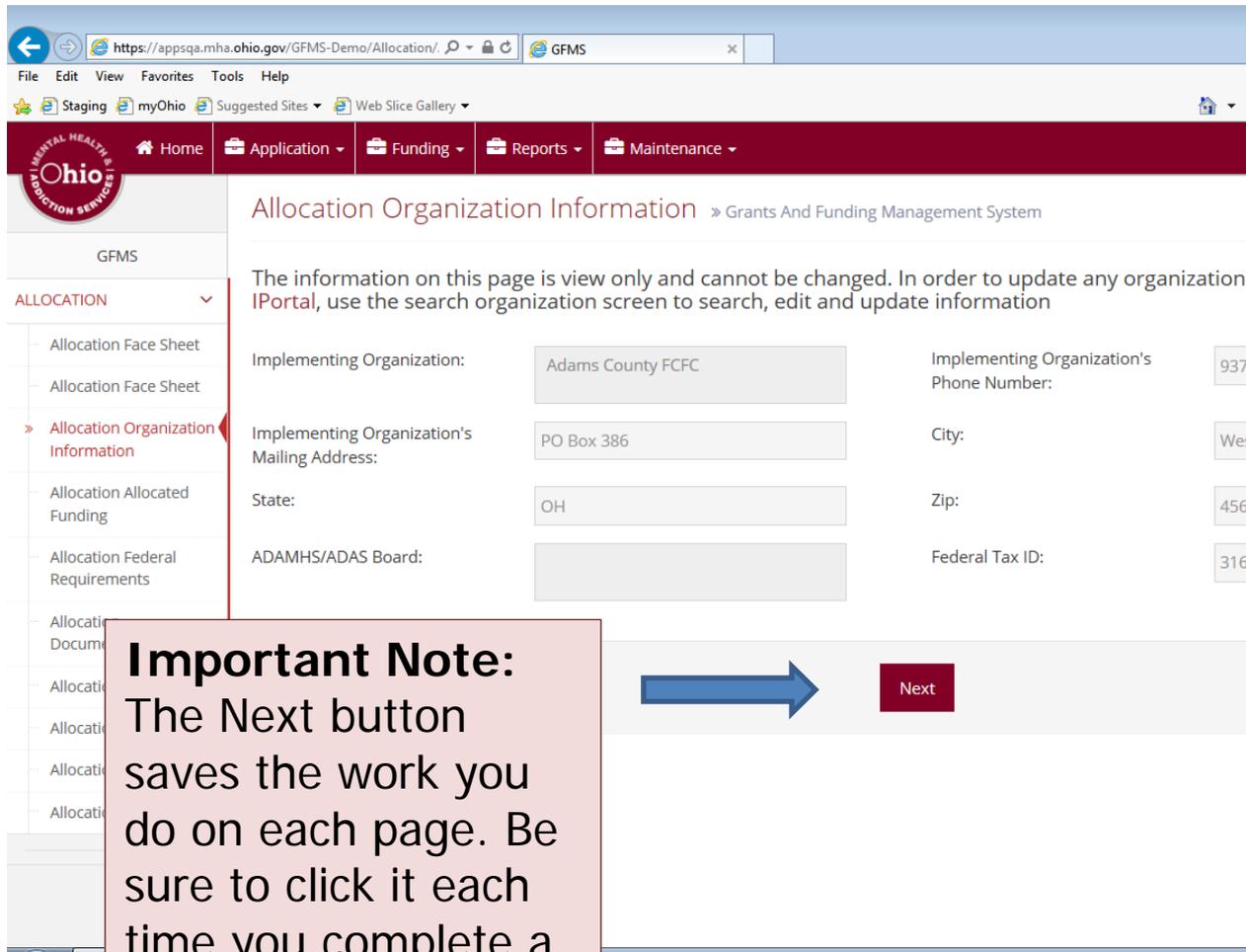
**Primary Contact** - This should be the name and contact information of the Administrative Agent (AA) on file with Ohio Family and Children First (OFCF) (i.e., Director, Superintendent, Commissioner, or Judge. Do not enter an AA designee in this field).

**Secondary Contact** - This should be the name and contact information of the FCFC Coordinator/Director.

**Fiscal Officer** - This should be the person that handles the day-to-day fiscal processes pertaining to your county FCFC. If you do not have an assigned fiscal office, then repeat the AA contact information to bypass this required field.

Click Create.

# Organization Information



Allocation Organization Information > Grants And Funding Management System

The information on this page is view only and cannot be changed. In order to update any organization IPortal, use the search organization screen to search, edit and update information

Implementing Organization: Adams County FCFC

Implementing Organization's Mailing Address: PO Box 386

State: OH

ADAMHS/ADAS Board:

Implementing Organization's Phone Number: 937-...

City: Wes...

Zip: 4569...

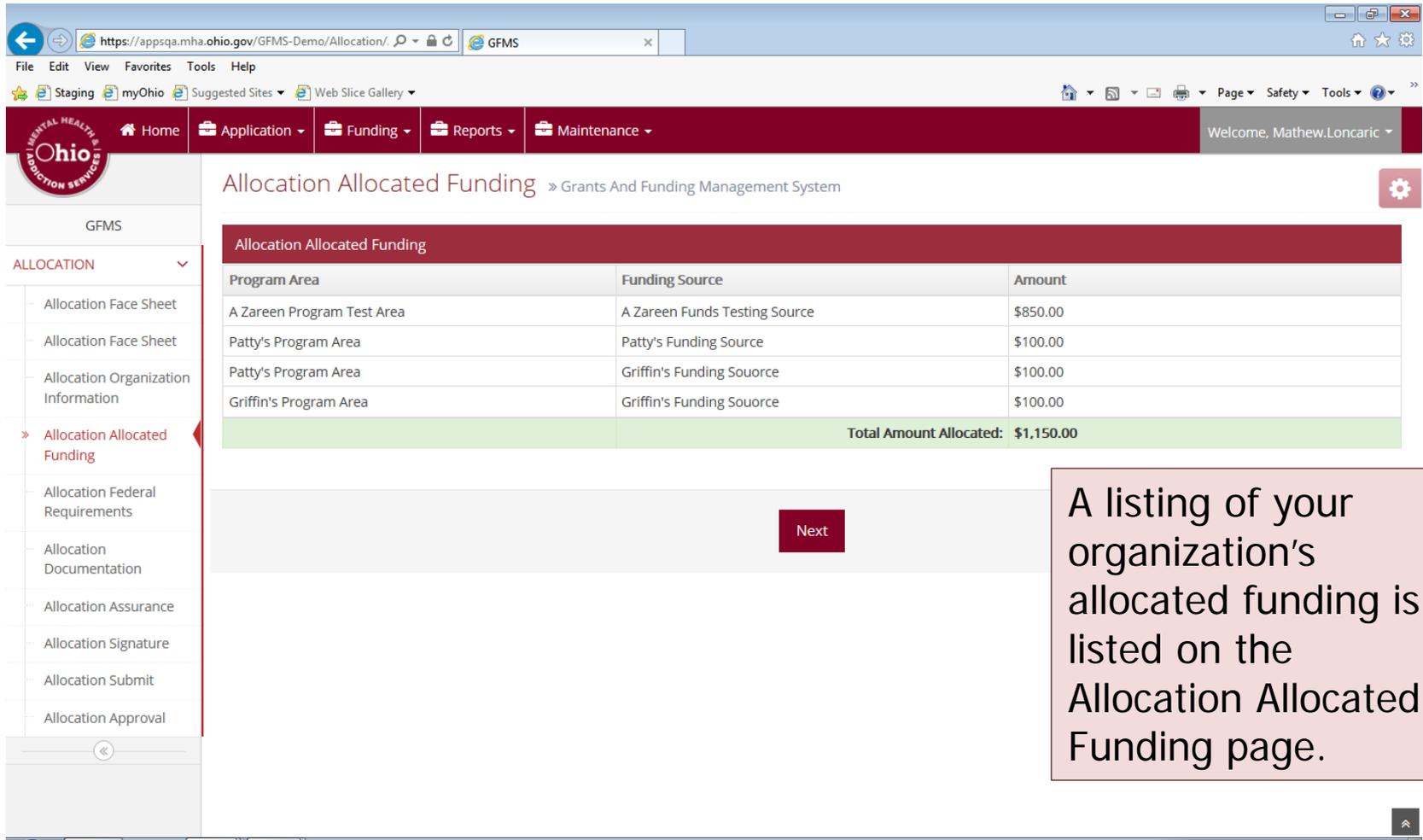
Federal Tax ID: 3164...

Next

The organization information is pre-populated and view only mode. If updates need to be made to this page, please contact the OhioMHAS HelpDesk at [MHAHelpDesk@mha.ohio.gov](mailto:MHAHelpDesk@mha.ohio.gov).

**Important Note:** The Next button saves the work you do on each page. Be sure to click it each time you complete a page.

# Allocated Funding



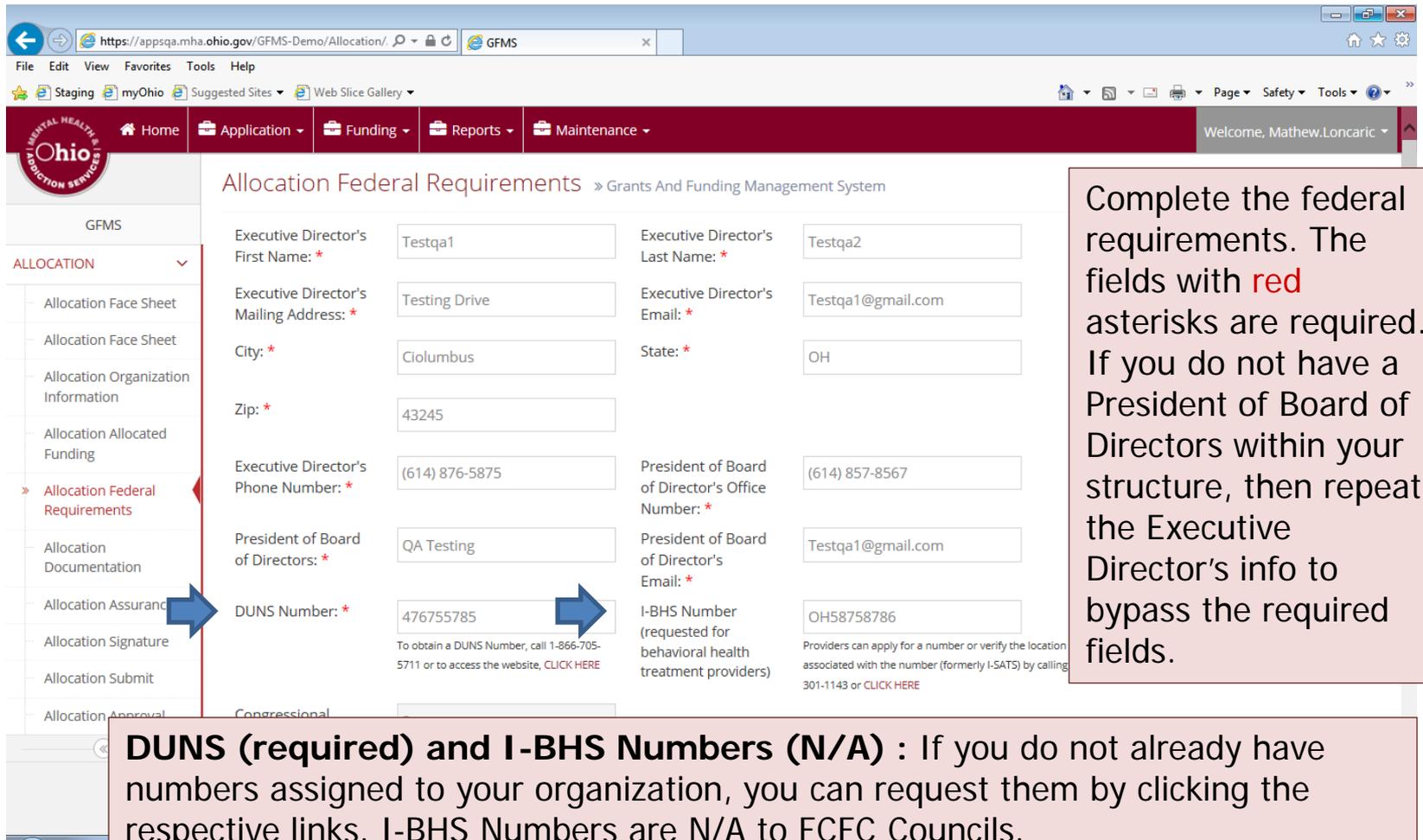
Allocation Allocated Funding » Grants And Funding Management System

Program Area	Funding Source	Amount
A Zareen Program Test Area	A Zareen Funds Testing Source	\$850.00
Patty's Program Area	Patty's Funding Source	\$100.00
Patty's Program Area	Griffin's Funding Source	\$100.00
Griffin's Program Area	Griffin's Funding Source	\$100.00
<b>Total Amount Allocated:</b>		<b>\$1,150.00</b>

[Next](#)

A listing of your organization's allocated funding is listed on the Allocation Allocated Funding page.

# Allocation Federal Requirements



Allocation Federal Requirements > Grants And Funding Management System

Executive Director's First Name: *	<input type="text" value="Testqa1"/>	Executive Director's Last Name: *	<input type="text" value="Testqa2"/>
Executive Director's Mailing Address: *	<input type="text" value="Testing Drive"/>	Executive Director's Email: *	<input type="text" value="Testqa1@gmail.com"/>
City: *	<input type="text" value="Columbus"/>	State: *	<input type="text" value="OH"/>
Zip: *	<input type="text" value="43245"/>		
Executive Director's Phone Number: *	<input type="text" value="(614) 876-5875"/>	President of Board of Director's Office Number: *	<input type="text" value="(614) 857-8567"/>
President of Board of Directors: *	<input type="text" value="QA Testing"/>	President of Board of Director's Email: *	<input type="text" value="Testqa1@gmail.com"/>
DUNS Number: *	<input type="text" value="476755785"/>	I-BHS Number (requested for behavioral health treatment providers)	<input type="text" value="OH58758786"/>

To obtain a DUNS Number, call 1-866-705-5711 or to access the website, [CLICK HERE](#)

Providers can apply for a number or verify the location associated with the number (formerly I-SATS) by calling 301-1143 or [CLICK HERE](#)

**DUNS (required) and I-BHS Numbers (N/A) :** If you do not already have numbers assigned to your organization, you can request them by clicking the respective links. I-BHS Numbers are N/A to FCFC Councils.

Complete the federal requirements. The fields with red asterisks are required. If you do not have a President of Board of Directors within your structure, then repeat the Executive Director's info to bypass the required fields.

# Federal Requirements, con't: "FFATA"

43245

Executive Director's Phone Number: \* (614) 876-5875

President of Board of Directors: \* QA Testing

DUNS Number: \* 476755785  
To obtain a DUNS Number, call 1-866-705-5711 or to access the website, [CLICK HERE](#)

Congressional District: \* 2

Do you receive 80% or more of your annual gross revenue or \$25,000,000 or more from federal funding? \* No

If Yes, please enter the top five Executive Officers and their income information.  
If you don't have five, list all your Executives. \*

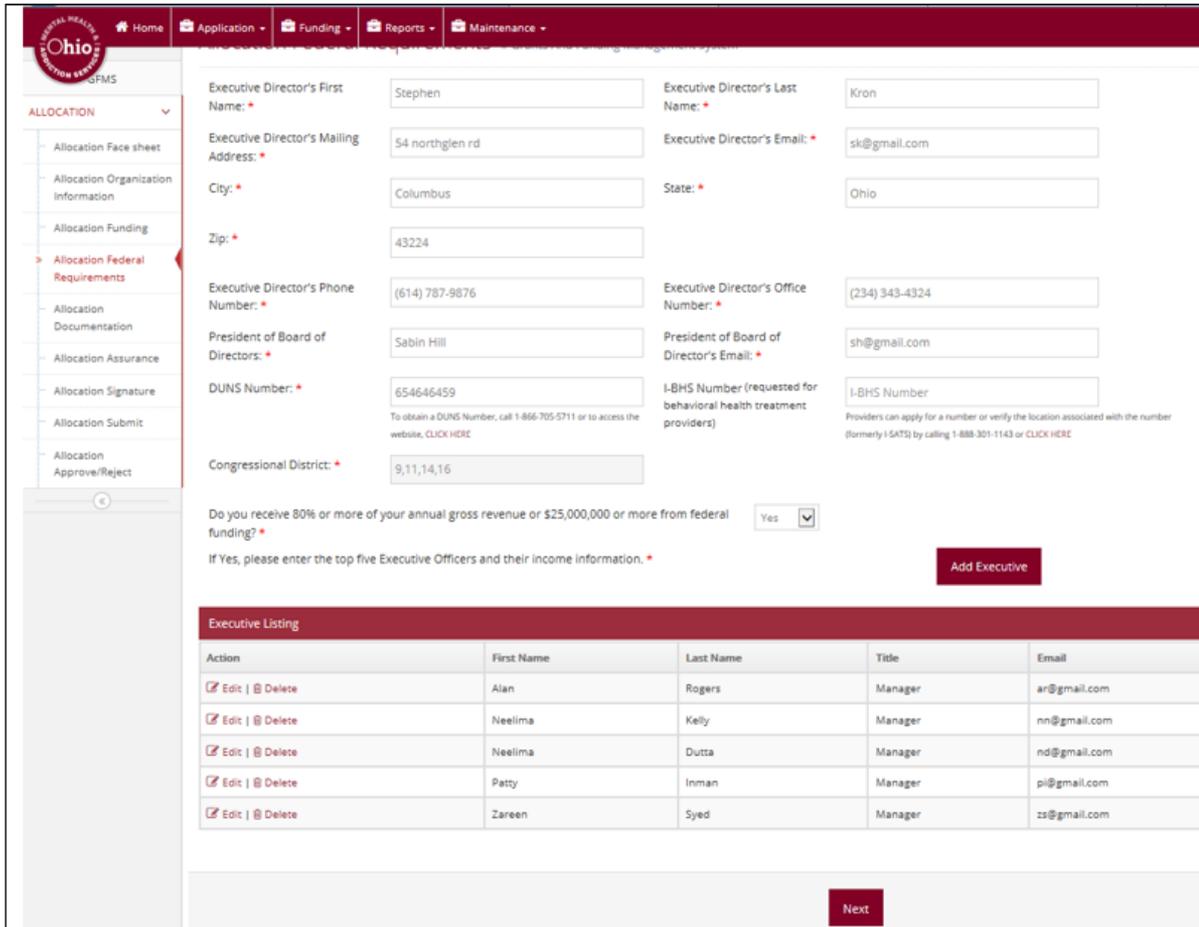
There are no Executive List at this time.

Next

To comply with the Federal Funding Accountability & Transparency Act (FFATA), complete the section related to your Administrative Agent's annual gross revenue, not the FCFC.

You may refer to the website <https://www.fsrs.gov/> for more information on the FFATA legislation and Federal Office of Management and Budget guidance on executive compensation reporting.

# Federal Requirements, con't: "FFATA"



Executive Director's First Name: Stephen  
 Executive Director's Last Name: Kron  
 Executive Director's Mailing Address: 54 northglen rd  
 Executive Director's Email: sk@gmail.com  
 City: Columbus  
 State: Ohio  
 Zip: 43224  
 Executive Director's Phone Number: (614) 787-9876  
 Executive Director's Office Number: (234) 343-4324  
 President of Board of Directors: Sabin Hill  
 President of Board of Director's Email: sh@gmail.com  
 DUNS Number: 654646459  
 I-BHS Number (requested for behavioral health treatment providers):  
 Congressional District: 9,11,14,16

Do you receive 80% or more of your annual gross revenue or \$25,000,000 or more from federal funding?  Yes

If Yes, please enter the top five Executive Officers and their income information.

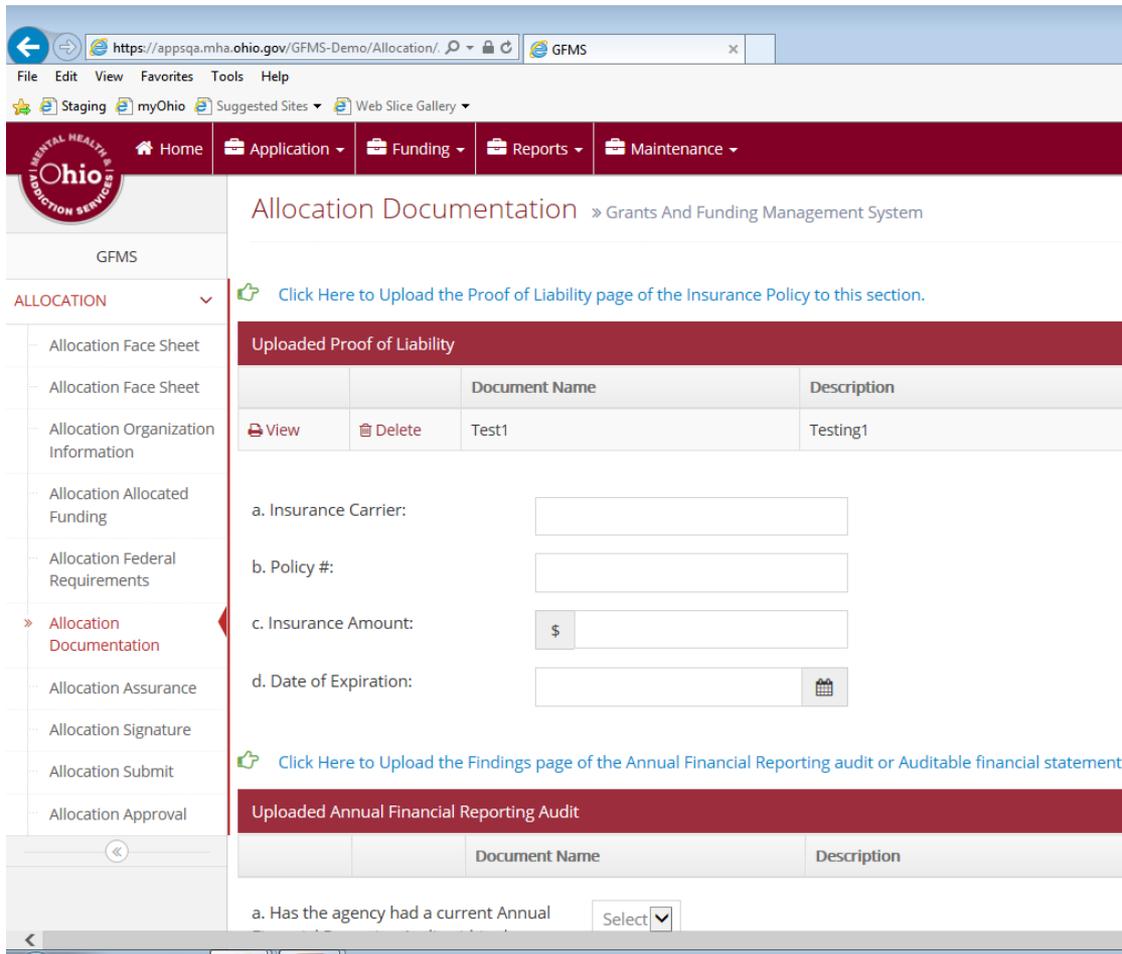
Action	First Name	Last Name	Title	Email
<input checked="" type="checkbox"/> Edit   <input type="checkbox"/> Delete	Alan	Rogers	Manager	ar@gmail.com
<input checked="" type="checkbox"/> Edit   <input type="checkbox"/> Delete	Neelima	Kelly	Manager	nn@gmail.com
<input checked="" type="checkbox"/> Edit   <input type="checkbox"/> Delete	Neelima	Dutta	Manager	nd@gmail.com
<input checked="" type="checkbox"/> Edit   <input type="checkbox"/> Delete	Patty	Inman	Manager	pi@gmail.com
<input checked="" type="checkbox"/> Edit   <input type="checkbox"/> Delete	Zareen	Syed	Manager	zs@gmail.com

If your Administrative Agent's organization receives \$25,000,000 or more from federal funds you will be required to enter an additional Executive within the organization. You must enter at least one (1) Executive, but you have the option to enter up to five (5) Executives.

To add Executive Directors, **select** the **Add Executive** button on the Allocation Federal Requirements screen, an "Add Executive" pop-up window will be displayed. In the "**Add Executive**" pop-up window, **enter** the required information and **select** the **Add** button.

Repeat steps above to add additional Executives.

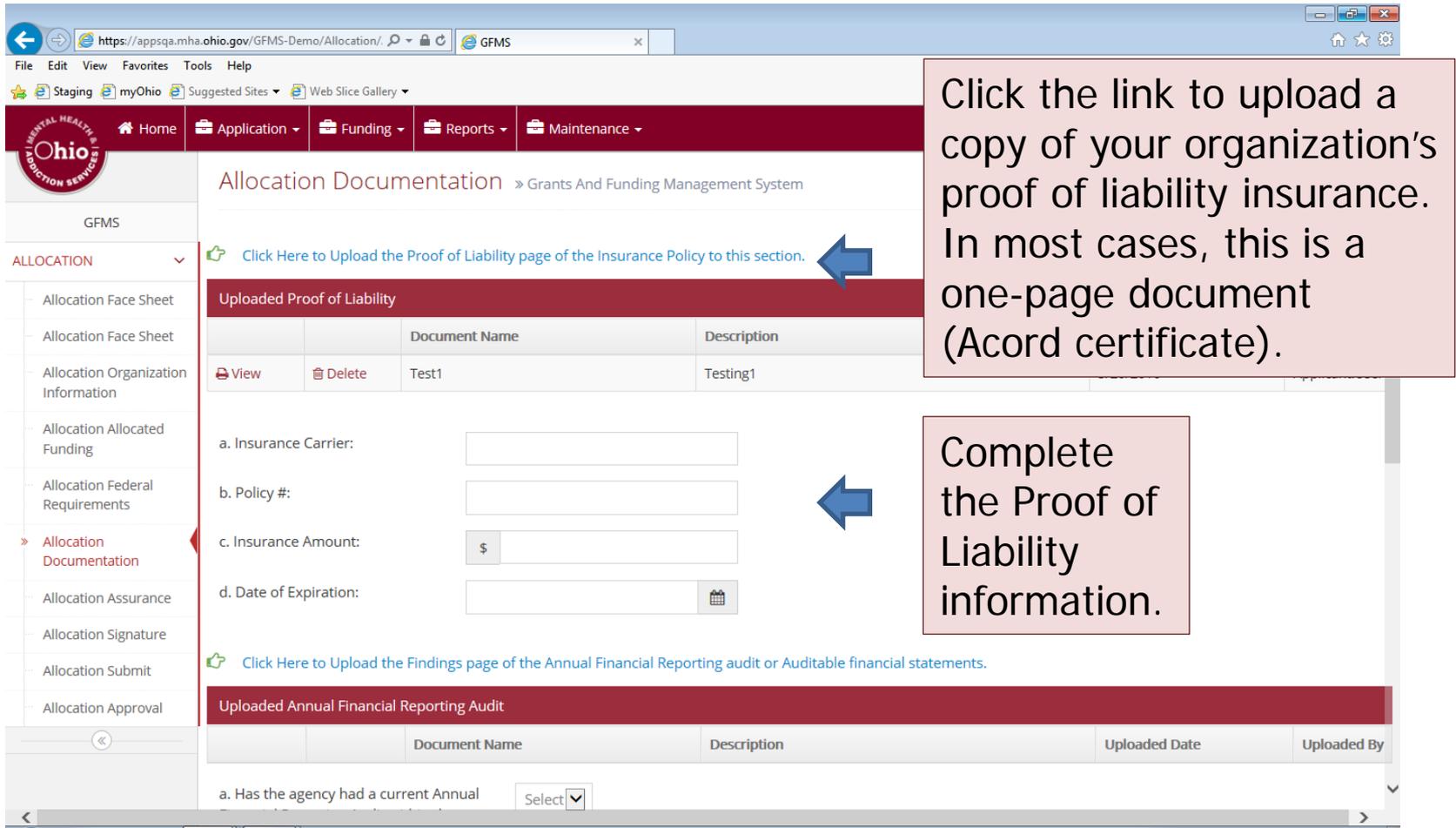
# Allocation Documentation



The Allocation Documentation screen is where the Insurance Policy, Annual Financial Reporting Audit, program documentation, MOU and any additional documents may be attached (uploaded).

This page is optional. Follow the instructions on the next few slides OR if you would like to bypass this screen, select the **Next** button.

# Allocation Documentation, con't



[Click Here to Upload the Proof of Liability page of the Insurance Policy to this section.](#)

Uploaded Proof of Liability		Document Name	Description
		Test1	Testing1

a. Insurance Carrier:   
 b. Policy #:   
 c. Insurance Amount: \$   
 d. Date of Expiration:

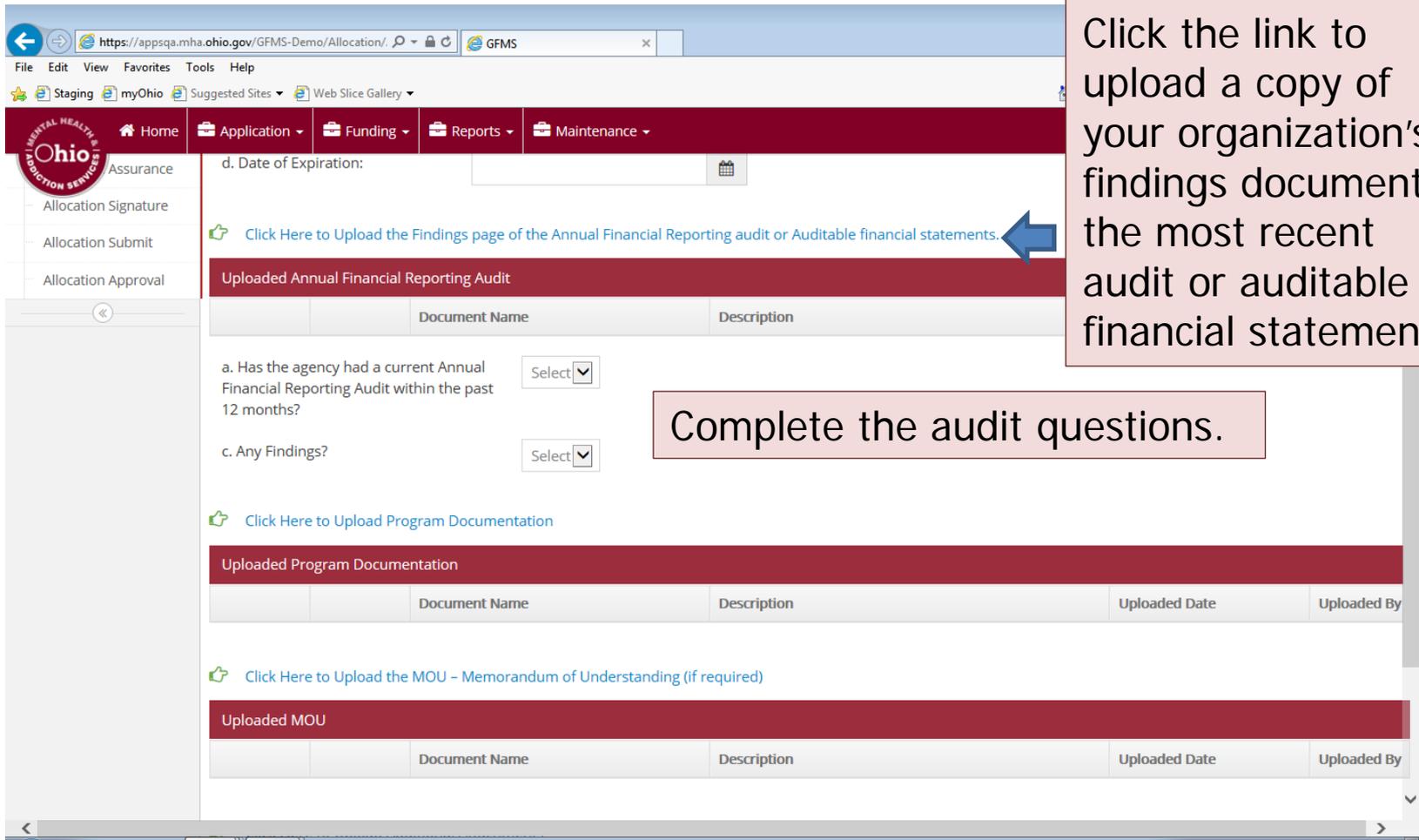
[Click Here to Upload the Findings page of the Annual Financial Reporting audit or Auditable financial statements.](#)

Uploaded Annual Financial Reporting Audit			
Document Name	Description	Uploaded Date	Uploaded By
a. Has the agency had a current Annual	Select		

Click the link to upload a copy of your organization's proof of liability insurance. In most cases, this is a one-page document (Acord certificate).

Complete the Proof of Liability information.

# Allocation Documentation, con't



The screenshot shows a web browser window with the URL <https://appsqa.mha.ohio.gov/GFMS-Demo/Allocation/>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The application's navigation bar contains Home, Application, Funding, Reports, and Maintenance. A sidebar on the left lists Assurance, Allocation Signature, Allocation Submit, and Allocation Approval.

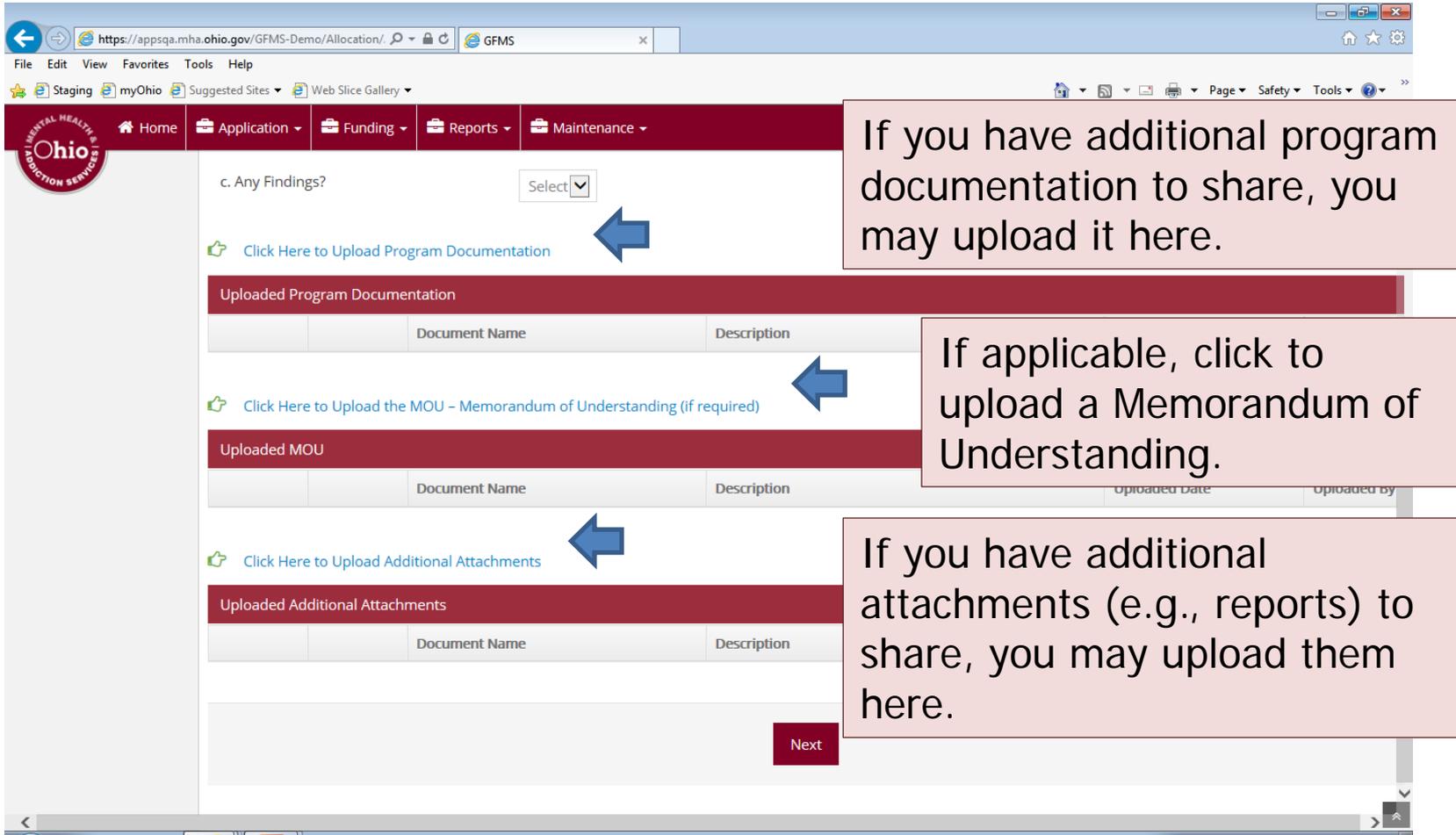
The main content area includes:

- Field "d. Date of Expiration:" with a calendar icon.
- Link: [Click Here to Upload the Findings page of the Annual Financial Reporting audit or Auditable financial statements.](#) (A blue arrow points to this link.)
- Section: **Uploaded Annual Financial Reporting Audit**
- Table with columns: Document Name, Description.
- Question "a. Has the agency had a current Annual Financial Reporting Audit within the past 12 months?" with a "Select" dropdown.
- Question "c. Any Findings?" with a "Select" dropdown.
- Link: [Click Here to Upload Program Documentation](#)
- Section: **Uploaded Program Documentation**
- Table with columns: Document Name, Description, Uploaded Date, Uploaded By.
- Link: [Click Here to Upload the MOU - Memorandum of Understanding \(if required\)](#)
- Section: **Uploaded MOU**
- Table with columns: Document Name, Description, Uploaded Date, Uploaded By.

Click the link to upload a copy of your organization's findings document of the most recent audit or auditable financial statements.

Complete the audit questions.

# Allocation Documentation, con't



The screenshot shows a web browser window with the URL <https://appsqa.mha.ohio.gov/GFMS-Demo/Allocation/>. The application interface includes a navigation menu with 'Home', 'Application', 'Funding', 'Reports', and 'Maintenance'. The main content area is titled 'c. Any Findings?' and features a 'Select' dropdown menu. Below this, there are three distinct upload sections, each with a callout box:

- Program Documentation:** A callout box states, "If you have additional program documentation to share, you may upload it here." A blue arrow points to the link "Click Here to Upload Program Documentation". Below this link is a table header for "Uploaded Program Documentation" with columns for "Document Name" and "Description".
- MOU:** A callout box states, "If applicable, click to upload a Memorandum of Understanding." A blue arrow points to the link "Click Here to Upload the MOU - Memorandum of Understanding (if required)". Below this link is a table header for "Uploaded MOU" with columns for "Document Name", "Description", "Uploaded Date", and "Uploaded By".
- Additional Attachments:** A callout box states, "If you have additional attachments (e.g., reports) to share, you may upload them here." A blue arrow points to the link "Click Here to Upload Additional Attachments". Below this link is a table header for "Uploaded Additional Attachments" with columns for "Document Name" and "Description".

At the bottom right of the application interface, there is a red "Next" button.

# Allocation Assurance

Click View to see the OhioMHAS SFY 2017 Assurances document. By checking the "I Agree" box, you indicate that the Administrative Agent's Chief Executive Officer agrees in full to the Assurances terms and conditions.

Allocation Assurance » Grants And Funding Management System

GFMS

ALLOCATION

- Allocation Face Sheet
- Allocation Face Sheet
- Allocation Organization Information
- Allocation Allocated Funding
- Allocation Federal Requirements
- Allocation Documentation
- » Allocation Assurance
- Allocation Signature
- Allocation Submit
- Allocation Approval

Please read the Assurances carefully by clicking on its title. Then select the checkbox next to

Checking the box below is the equivalent of a digital signature. By checking these box, you indicate that you agree in full to the specified Assurances as it is presented and that you are the CEO of the agency applying for the funds specified on this Allocation application or a delegate acting on their behalf.

Assurance					
Action	Assurances	Fiscal Year	Signatory	Date of Signature	I Agree
View	Allocation Assurance	2016			<input type="checkbox"/>

Next

# Allocation Signature

Click the link to download a blank unsigned signature page, which REQUIRES YOUR ADMINISTRATIVE AGENT'S SIGNATURE (or Designee, on file with OFCF). Complete the signature page and upload the completed signature page by clicking Upload Signature.

**Allocation Signature** » Grants And Funding Mana

Please upload a signature sheet bearing the signatures of both your agency's Chief Executive Officer and President of the Board of Directors.

Note that you will not be able to submit the allocation application without first uploading a signature page. If the signature page is incorrect, your allocation application will be returned upon review by OhioMHAS. This could delay or potentially stop the processing of your application.

Click here to download a blank unsigned copy of the signature sheet.

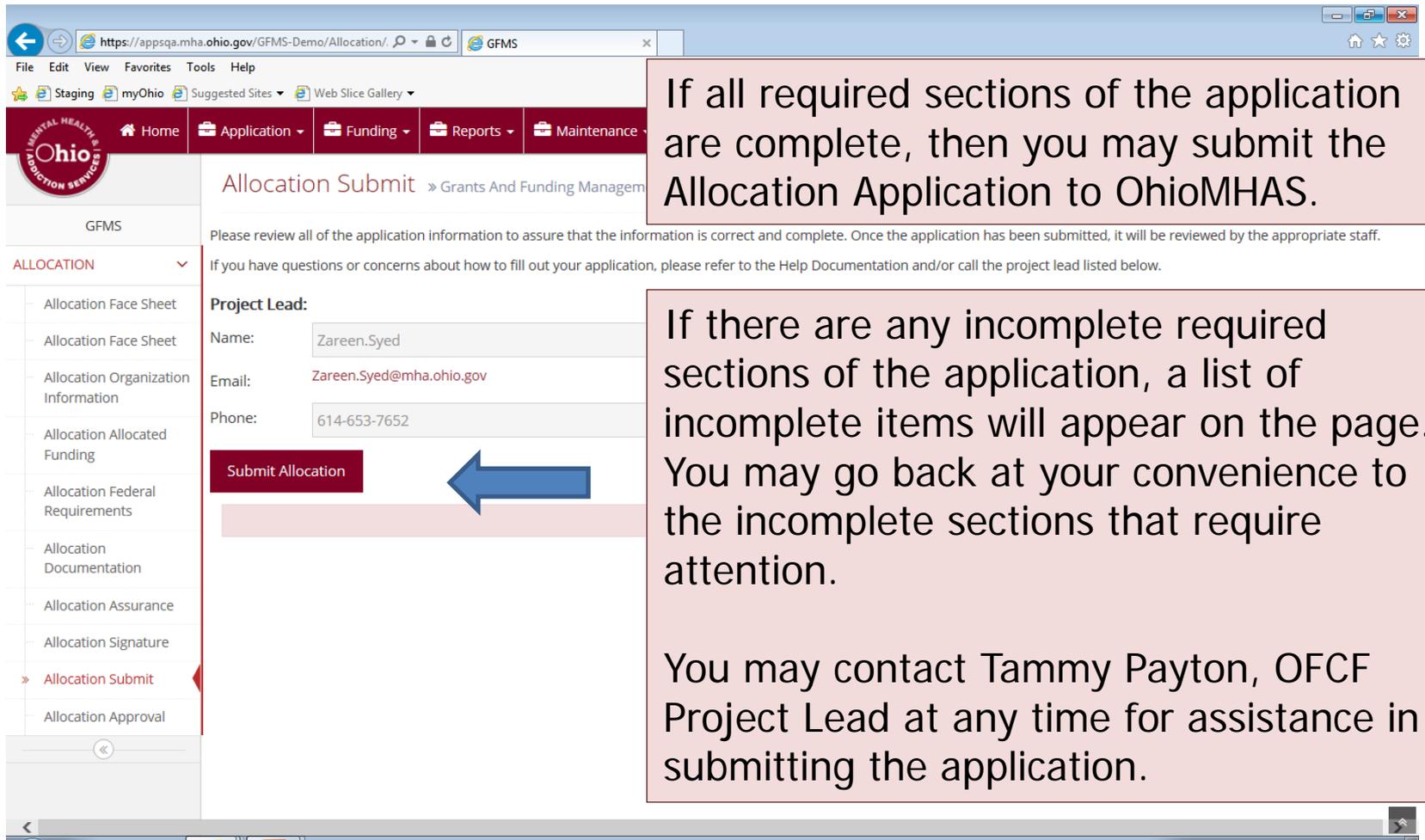
**Warning:** The file size for signature documents is limited to 2 MB per signature sheet. File type is limited to Adobe Acrobat (.pdf).

**Upload Allocation Signature**

Uploaded Signatures			
	Document Name	Uploaded Date	Uploaded By
	Prevention Signature	5/20/2016	Zareen.Syed

**Next**

# Allocation Submission



The screenshot shows a web browser window with the URL `https://appsqa.mha.ohio.gov/GFMS-Demo/Allocation/`. The page title is "Allocation Submit" under the "Grants And Funding Management" section. A navigation menu includes "Home", "Application", "Funding", "Reports", and "Maintenance". A sidebar on the left lists various application steps, with "Allocation Submit" highlighted. The main content area contains a "Project Lead" form with the following details:

Name:	Zareen.Syed
Email:	Zareen.Syed@mha.ohio.gov
Phone:	614-653-7652

Below the form is a red "Submit Allocation" button, which is pointed to by a blue arrow. A pink callout box above the button contains the text: "If all required sections of the application are complete, then you may submit the Allocation Application to OhioMHAS." Another pink callout box to the right of the form contains the text: "If there are any incomplete required sections of the application, a list of incomplete items will appear on the page. You may go back at your convenience to the incomplete sections that require attention." A third pink callout box at the bottom right contains the text: "You may contact Tammy Payton, OFCF Project Lead at any time for assistance in submitting the application."