

Grants Management

QUICK REFERENCE GUIDE



GRANTS MANAGEMENT - AUGUST 2020

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SECTION 1: ACCESS SYSTEMS, APPLICATIONS AND USER NAMES/PASSWORDS

1.1 Summary

This section provides step-by-step directions for accessing the software systems needed to budget and request payments of your grant funds. Sections 1.2 – 1.6 are necessary to create/obtain access to the applications you will use to manage a grant. If you are receiving federal grant money from the Department, you will also need to follow sections 1.7 – 1.9.

1.2 Obtain An OH|ID Account and Department of Education Profile

As a grantee receiving funds from a state agency, you will use your OH|ID account to log into systems used by the Ohio Department of Education.

[Click here](#) to access the OH|ID portal sign-in page
[Click here](#) to access instructions to create an OH|ID and Department profile.
[Click here](#) for additional help.

1.3 Obtain an Ohio Administrative Knowledge System (OAKS) ID#

To do business with the State of Ohio, each grantee is required to an OAKS ID#

[Click here](#), if you do not have an OAKS ID#, and Create a New Account.

For more information, please submit an inquiry via the “[Contact Us](#)” page or call 877-644-6771. Allow 5 business days for the documents to be processed. You will be notified via email of your OAKS ID#.

1.3.1 Link OAKS and IRN Numbers

To receive grants payments, your OAKS ID# and your IRN must be linked. To complete this step, you must have your IRN and your OAKS Supplier/Vendor ID.

[Click here](#) to request the Department’s fiscal office to link the two numbers.*

***If the link does not work – please send an e-mail with the information below:**

<p>To: brenda.clarridge@education.ohio.gov and Fiscal.Management@education.ohio.gov</p> <p>Subject: Link Supplier/Vendor ID (OAKS#) to IRN</p> <p>Body of Email: Please send the below information needed to link our Supplier ID and IRN.</p> <p>Organization Name: _____ IRN: _____</p> <p>Supplier/Vender ID: _____</p> <p>Address for fiscal matters (used to set up OAKS): _____</p>

1.4 Obtain Access the Ohio Education Directory System (OEDS)

You need access to OEDS to manage who in your organization can complete budgets, request payments and provide final approvals.

[Click here](#) to access OEDS (Use you OH|ID user name and password to login).
[Click here](#) for assistance if you do not see the Ohio Education Directory tile in the application section once you have successfully logged into the OH|ID portal.



My Sites & Applications



CCIP

Grant application & planning system

[Go To Site](#)

1.5 Assign Roles in OEDS

These roles are necessary to access funding applications, request grant money (project cash requests - PCR) and submitting a final expenditure report (FER). The OEDS Administrator assigned to your organization has the authority to assign roles.

Your organization must assign someone to the roles of Superintendent or CCIP Authorized Representative and Treasurer or CCIP Fiscal Representative. Other roles are optional.

Typically, the roles of Superintendent/CCIP Authorized Representative and Treasurer/ CCIP Fiscal Representative are assigned to different individuals. We recognize that the structure of some organizations receiving a grant makes the separation of these duties a challenge. Please feel free to reach out to the office of Grants Management at grants.management@education.ohio.gov if you need assistance with this step.

[Click here](#) to access OEDS (Use you OH|ID user name and password to login).
[Click here](#) to view a presentation about assigning key roles in OEDS.
[Click here](#) if you **are not sure** if you have an OEDS Administrator assigned to your organization or is that person is no longer with your organization.

1.6 Access the Comprehensive Continuous Improvement Plan (CCIP)

The CCIP is a unified grants application and verification system that contain items such as grant funding applications, project cash requests (PCR) and a final expenditure report (FER).

[Click here](#) to access the CCIP. (Use you OH|ID user name and password to login).

[Click here](#) to view a presentation about the data requirements needed to access the CCIP.

*****FOR FEDERAL GRANT RECIPIENTS ONLY*****

1.7 Obtain Data Universal Number System

A **DUNS number** is a unique nine-character number used to identify your organization. The federal government uses the DUNS number to track how federal money is allocated.

Click [here](#) for detailed instructions at grants.gov

1.8 Register DUNS number in the System of Award Management (SAM)

Registering with SAM is a required step for your organization to be able to apply for federal grants.

Click [here](#) for detailed instructions.

NOTE: At the bottom of the instructions page you will have the option to proceed to step 3 to create a Grants.gov account. THIS STEP IS NOT REQUIRED WHEN RECEIVING GRANT FUNDS FROM THE DEPARTMENT.

1.9 Enter your organization's DUNS in Ohio Education Directory (OEDS)

Click [here](#) for detailed instructions (see step 3 on page 7).

SECTION 2: THE GRANTS MANUAL

2.1 Summary

The Ohio Department of Education's Office of Grants Management created this guide to help chief financial officers and treasurers manage their districts' grants. The manual outlines the fiscal representatives' responsibilities, which include meeting many legal requirements; establishing and monitoring fiscal management procedures and sharing information with stakeholders.

At any time, you feel you need assistance, please contact the Office of Grants Management at Grants.Management@education.ohio.gov. You can also reach out to your grant's management contact found in the address book of the CCIP.

2.2 Access Grant Manual

[Click here](#) for access to the *Grants Manual* prepared by the Ohio Department of Education's - Office of Grant's Administration.

SECTION 3: SUBMITTING A BUDGET

3.1 Summary

Grant recipients are required to submit an application and budget for approval prior to accessing funds. The Comprehensive Continuous Improvement Plan (CCIP) is a grants application and verification system that includes the Funding Application. The Funding Application contains the budget, the application and other related pages.

3.2 Complete the budget in the CCIP

[Click here](#) for access to the *Grants Manual* (see pages 9-10).

[Click here](#) for quick access to *Submitting a Budget in the CCIP*.

[Click here](#) for quick access to *Budgeting Expenses and Required Support Documentation*

SECTION 4: SUBMITTING A PROJECT CASH REQUEST (PCR)

4.1 Summary

After incurring allowable expenditures under the grant, grantees request funds by submitting a Project Cash Request (PCR) and can be submitted during the performance period. Funds requested must be for allowable expenses that were approved in the grant application and budget. Ensuring expenses are allowable requires knowledge of federal, state and program requirements. This guidance provides a summary of requirements as well as helpful links. Please be sure to review specific grant requirements and direct questions regarding allowable cost to your program area consultant. Questions related to the cash request should be directed to the Office of Grants Management.

The CCIP will not allow you to submit a PCR when a prior one is being processed for payment. A PCR status must show "State Accounting Paid" before another PCR can be submitted. A typical PCR fiscal cycle is 7 – 10 days unless additional information is being requested.

4.2 How to submit a PCR and expending funds

[Click here](#) for access to the *Grants Manual* (see pages 11-14).

[Click here](#) for quick access to *Creating a Project Cash Request*

SECTION 5: SUBMITTING A FINAL EXPENDITURE REPORT

5.1 Summary

At the end of the grant period, you are required to submit a final expenditure report (FER). A FER must be submitted to show how grant funds were expended during the grant period. Any unused funds will be reported on the FER and, if permitted, moved forward for the next fiscal year. If funds were awarded but no grant funds were expended during the year, a FER must be filed reflecting zero expenditures.

5.2 How to submit a FER

[Click here](#) for access to the *Grants Manual* (see pages 15-17)

[Click here](#) for quick access to *Final Expenditure Reports*

[Click here](#) for a video about submitting a FER in the CCIP

SECTION 6: QUICK REFERENCE CHECKLIST

6.1 Data System Requirements

Action	Job Aids		Date Completed
Obtain OH ID	Instructions	OH ID Portal Login	
Set up Department Profile	Instructions	OH ID Portal Login	
Obtain an OAKS ID#	OSS portal		
Link OAKS # and IRN	E-mail to fiscal		
Obtain OEDS access	Access using your OH ID		
Assigning Roles in OEDS	Instructions	Presentation: CCIP Key Roles in OEDS	
Obtain CCIP access	Access using your OH ID	Presentation: CCIP – Data Access Requirements	
Dun & Bradstreet*	Obtain a DUNS number		
Register with SAM*	Register with SAM		
Enter DUNS in OEDS*	Instructions		

*Requirement for Federal Grantees Only

6.2 Budget, Request Payments, Final Reporting

Action	Job Aids		Date Completed
Submit Budget	Instructions		
Request for Payment**	Instructions		
Final (fiscal) Reporting	Instructions	Video: Final Expenditure Report (FER) – Submitting in CCIP	

**Can submit multiple requests during the period of performance