

Grants Management

QUICK REFERENCE GUIDE



GRANTS MANAGEMENT – June 2022 - Revised

Table of Contents

QUICK REFERENCE CHECKLIST	1
SECTION 1: ACCESS SYSTEMS, APPLICATIONS AND USER NAMES/PASSWORDS.....	2
Summary.....	2
1.1 Obtain An OH ID Account and Department of Education Profile.....	2
1.2 Obtain an Ohio Administrative Knowledge System (OAKS) Supplier/Vendor ID	2
1.3 Obtain an Information Retrieval Number (IRN)	3
1.4 Obtain Access the Ohio Education Directory System (OEDS)	3
1.5 Assign Roles in OEDS	4
1.6 Associate OAKS ID# to IRN Number	4
1.7 Access the Comprehensive Continuous Improvement Plan (CCIP)	5
1.7a Add Contact to CCIP	5
FOR FEDERAL GRANT RECIPIENTS ONLY	6
1.8 Obtain a UEI or Register in SAM.gov	6
1.9 Enter UEI in Ohio Education Directory (OEDS)	6
SECTION 2: THE GRANTS MANUAL	7
Summary.....	7
2.1 Access Grant Manual	7
SECTION 3: SUBMITTING AN APPLICATION/BUDGET	8
Summary.....	8
3.1 Complete the budget in the CCIP	8
SECTION 4: SUBMITTING A PROJECT CASH REQUEST (PCR).....	9
Summary.....	9
4.1 How to submit a PCR and expending funds.....	9
SECTION 5: SUBMITTING A FINAL EXPENDITURE REPORT	10
Summary.....	10
5.1 How to submit a FER	10

QUICK REFERENCE CHECKLIST

This checklist provides all the steps that a grantee must take to obtain access to grant funds in the Comprehensive Continuous Improvement System (CCIP) e-grant system. The checklist can be used to track your progress as you move through each step. Please try to follow these steps in order. Use the checklist links to navigate directly to where you are in the setup process and to access the applicable guidance.

Section 1: Access Systems		
Sections 1.1 – 1.7 are necessary to create/obtain access to the applications you will use to manage a grant.		
Section 1	Action	Completed
1.1	Obtain an OH ID Account	
1.1	Obtain a Department of Education Profile	
1.2	Obtain an OAKS Supplier/Vendor ID	
1.3	Obtain an Information Retrieval Number (IRN)	
1.4	Obtain Access to the Ohio Education Directory System (OEDS)	
1.5	Assign Roles in OEDS	
1.6	Associate OAKS Supplier/Vendor ID	
1.7	Access the Comprehensive Continuous Improvement Plan (CCIP)	
Sections 1.8 – 1.9 are necessary to complete if you are receiving federal grant money from the Department		
1.8	Obtain a UEI or Register in SAM.gov	
1.9	Enter UEI in OEDS	
Section 2: The Grants Manual		
This manual outlines the fiscal representatives' responsibilities.		
2.1	Grants Manual (For reference only)	
Section 3: Submit an Application/Budget		
Grant recipients are required to submit an application/budget in the CCIP for approval prior to accessing funds.		
3.1	Complete the budget in the CCIP	
Section 4: Submit a Project Cash Request (PCR)		
After incurring allowable expenditures under the grant, grantees request funds by submitting a PCR in the CCIP.		
4.1	Submit a request for reimbursement (PCR)	
Section 5: Submit a Final Expenditure Report (FER)		
At the end of the grant period, you are required to submit a final expenditure report (FER) in the CCIP.		
5.1	Submit a FER	

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

Summary

There are several steps that must be taken to obtain access to the CCIP. The first steps involve gaining access to the software systems. This requires setting up various security credentials. This section provides step-by-step directions for accessing the software systems needed to access the CCIP system and manage your grant. Sections 1.1 – 1.7 are necessary to create/obtain access to the applications you will use to manage a grant.

Note: Completing steps 1.8 – 1.9 is only required if you are receiving federal grant money from the Department.

Let's get started!

1.1 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.

If you already have an OH|ID and Department profile, go directly to the [sign-in page](#).

If you do not have an OH|ID, access instructions to [create an OH|ID and Department profile](#).

For additional help, access the [Department of Education OH|ID Portal Help page](#).

1.2 Obtain an Ohio Administrative Knowledge System (OAKS) Supplier/Vendor ID

To do business with the State of Ohio, each grantee is required to have an OAKS Supplier/Vendor ID and provide banking information to receive payment. (If your organization currently receives payments from the Department or another state agency, it is likely you already have an OAKS Supplier/Vendor ID.)

If you do not have an OAKS Supplier/Vendor ID you will need to [create a new account](#).

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

1.3 Obtain an Information Retrieval Number (IRN)

To do business with the Ohio Department of Education, each grantee is required to have IRN. The IRN is as a unique numeric identifier.

[Search for your organizations IRN](#) in the Ohio Education Directory (OEDS).

If your organization does not have an IRN you will need to request one. *

[Create/Establish a New Organization](#) in the Ohio Education Directory (OEDS).

*The person requesting an IRN will need an OH|ID account and an active Department of Education profile (Step 1.1).

1.4 Obtain Access the Ohio Education Directory System (OEDS)

You or someone in your organization will need the role of OEDS Administrator to manage who in your organization is authorized to complete budgets, request payments, and provide final approvals in the CCIP.

[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 System tile in the application section once you have successfully logged into the OH|ID portal.



My Sites & Applications



Ohio Education Directory System (OEDS)

Directory of schools and districts

[Go To Site](#) 

1.5 Assign Roles in OEDS

Roles are necessary to access funding applications, request grant money (project cash requests - PCR) and submit a final expenditure report (FER) in the CCIP e-grant system. 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. Typically, these roles are assigned to different individuals. We recognize that the structure of some organizations receiving a grant makes the separation of these duties a challenge.

After the CCIP related roles are assigned in OEDS, you will automatically be assigned the CCIP application tile. The tile may take up to 24 hours to appear in your OH|ID account.

- [Access OEDS](#) (Use your OH|ID user name and password to login).
- Instructions to [add/assign the roles](#) in OEDS.
- For help finding your organization's OEDS Administrator or if the person is no longer with your organization, please reach out to your organization's [data custodian](#).

If you need additional assistance with this step, please feel free to reach out to the office of Grants Management at grants.management@education.ohio.gov

1.6 Associate OAKS ID# to IRN Number

To receive grant payments, your state of Ohio OAKS Supplier/Vendor ID and the Department assigned Information Retrieval Number (IRN) must be associated with one another. Before you can complete this step be sure you have both.

To complete this step, please [send an e-mail](#) to the Department's fiscal office.*

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

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

1.7 Access the Comprehensive Continuous Improvement Plan (CCIP)

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

[Sign in](#) to the CCIP. (Use you OH|ID user name and password to login).
View the [presentation](#) about the data requirements needed to access the CCIP.

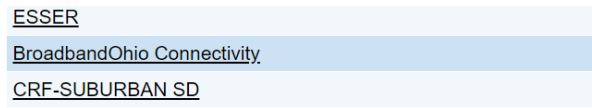
1.7a Add Contact to CCIP

If you are prompted to add a contact in the CCIP, please follow the below steps.

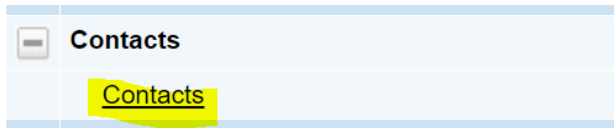
1. Hover over Funding in the menu on the left – click Funding Applications



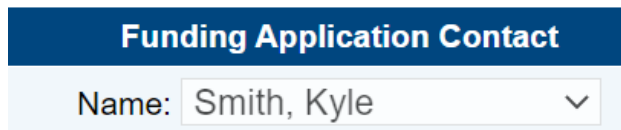
2. Click on the grant's name, this will take to the Sections page



3. On Sections page – scroll down to Contacts, click the contacts link



4. Choose a name from the dropdown menu



5. Use the left menu to navigate to another page in the CCIP or to sign out.

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

1.8 Obtain a UEI or Register in SAM.gov

A Unique Entity ID (UEI) is a unique 12-character alphanumeric value or identifier assigned to a specific entity. It is required for all grantees receiving federal funds. Registering with the SAM is only required for primary awardees receiving funds directly from the federal government.

Click [here](#) for detailed instructions (see steps 1 or 2).

1.9 Enter UEI in Ohio Education Directory (OEDS)

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

SECTION 2: THE GRANTS MANUAL

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.

Please contact the Office of Grants Management at Grants.Management@education.ohio.gov if you need assistance. You can also reach out to your grant's management contact found in the address book of the CCIP.

2.1 Access Grant Manual

The [Grants Manual](#) *has been* prepared by the Ohio Department of Education's - Office of Grant's Administration.

While you do not need to review the manual prior to completing the next steps in Section 3, the manual should be reviewed prior to expending grant funds to help ensure you understand many of the fiscal requirements of managing your grant.

Now let's move on to Section 3.

SECTION 3: SUBMITTING AN APPLICATION/BUDGET

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.

3.1 Complete the budget in the CCIP

[Grants Manual](#) (see pages 9-10).

Quick access to [Submitting a Budget in the CCIP](#).

Quick access to [Budgeting Expenses and Required Support Documentation](#)

SECTION 4: SUBMITTING A PROJECT CASH REQUEST (PCR)

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](#).

Note: 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.

4.1 How to submit a PCR and expending funds

[Grants Manual](#) (see pages 11-14).

Quick access to [Creating a Project Cash Request](#) instructions

SECTION 5: SUBMITTING A FINAL EXPENDITURE REPORT

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.

Note: If payment is due to the grantee at the time you file the FER, payment for any deficit amount will automatically generate once the Department approves the FER.

5.1 How to submit a FER

[Grants Manual](#) (see pages 15-17)

Quick access to [Final Expenditure Report](#) instructions.

[Video](#) about submitting a FER in the CCIP