



Mike DeWine, Governor  
Jon Husted, Lt. Governor

Office of Budget  
and Management

Kimberly Murnieks, Director

# Coronavirus Relief Fund (CRF)



Office of Budget  
and Management

**OBM Grants Portal Reporting Job Aid**

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This Job Aid is to assist those required to report Coronavirus Relief Fund (CRF) Activity in the OBM Grants Portal. The following are steps to assist with entering information in the portal. The CRF Recipient Reporting Guidance and FAQ document should be used in conjunction with this job aid when completing reporting.

- 1) The grant contact will receive an email like the example below approximately two weeks prior to the due date indicating the Activity Report is due.

#### Activity Report Due Reminder for Reporting Sample



The Ohio Grants Partnership <grants@obm.ohio.gov>

Mon 9/28/2020 8:23 AM

To: You

Cc: [Redacted]

Hello Grants Manager:

This email is to notify you that your financial activity report for Reporting Sample is due on October 5, 2020. Kindly login to the Grants Portal at <https://grantsportal.ohio.gov> and complete.

Before you begin, please be prepared to provide the following information:

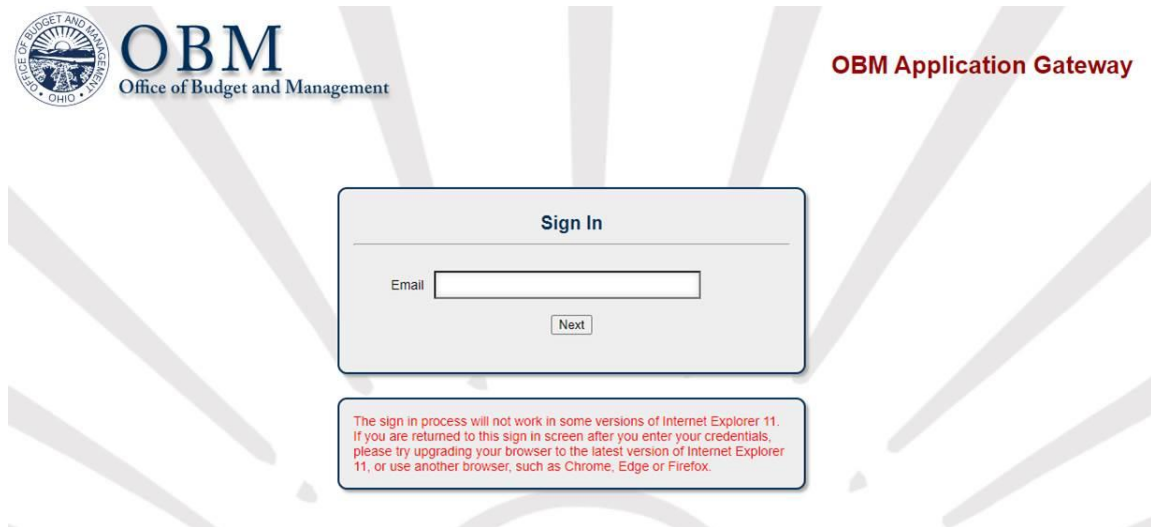
1. **Receipts.** If this is your first Activity Report, this will be the full distribution your organization received. For subsequent Activity Reports, this amount will be \$0 unless your organization received additional funds.
2. **Interest.** If your distribution was placed in an interest bearing account, enter the amount of interest gained on the balance during the reporting period.
3. **Expenditures.** Provide the total expenditure amount for the reporting period.
4. **Expenditure activities.** Be prepared to categorize activities that equal the total expenditure amount. You will be asked to select a category, provide a description and an amount. The following categories apply to this award:
  - o Other/Items not listed elsewhere
  - o Payroll for public health and safety employees
  - o Personal Protective Equipment
  - o Small Business Assistance

Please do not reply to this e-mail. You may contact the Ohio Grants Partnership at [grants@obm.ohio.gov](mailto:grants@obm.ohio.gov) if you have any questions or need assistance with this task.

Sincerely,

The Ohio Grants Partnership

- 2) You can use the e-mail to click the link to the Grants Portal or go there directly at [grantsportal.ohio.gov](http://grantsportal.ohio.gov). This will bring you to the sign in page. Sign in and you are ready to begin your reporting.



- 3) After successfully signing in, you will be brought to the screen below. Click on "My Awards"



- 4) Clicking “My Awards” will bring you to the screen below. Click “Submit an Activity Report” at the left side of the screen.

Ohio Grants Portal

OHIO GRANTS MY  
PORTAL AWARDS

Select Award: Gene's District Board of Health II - NFO-3 - Yes Application Questions / Yes Registration / Description Entered / No Matching / Login Activity Report

▼ Activity Reports

Your Activity Report for NFO-3 - Yes Application Questions / Yes Registration / Description Entered / No Matching / Login Activity Report is due by 09/10/2020.

Activity Report History

Reviewed	Sent Back	Due Date	Beginning	Receipts	Interest Earned	Expenditures	Cash On Hand	Obligated	Unobligated Bal
0 Records Displayed									

0 Total Records

Submit an Activity Report

▼ Documents

Upload File(s)

Add Files

Click the first file or folder, and then press and hold the Ctrl key. While holding down the Ctrl key, click each of the other files or folders you want to select.

Save

► Application

► Funding Opportunity Details

- 5) After clicking on Submit an Activity Report, a pop-up window will generate confirming you want to submit a report. Click “Yes”.

Ohio Grants Portal

OHIO GRANTS MY  
PORTAL AWARDS

Summary

Last Date Submitted

Reporting Period: 08/01/2020 - 08/02/2020

Due Date: 09/10/2020

Beginning Balance: \$0.00

Total Receipts for Reporting Period: \$0.00

Interest Earned for Reporting Period: \*

Total Expenditures for Reporting Period: \*

Cash On Hand: \$0.00

Amounts Obligated/Encumbered: \$0.00

Unobligated Balance: \$0.00

Save Summary

Submit Activity Report

Back

Date Notification

Do you want to submit an Activity Report for 09/10/2020?

Yes No

- 6) It is now time to start entering receipts, interest earned, expenditures, and encumbrances for the reporting period (i.e. 3/1 – 9/30, 10/1 – 12/30, etc.). All items with red asterisks must have amounts entered to proceed.

The screenshot shows the Ohio Grants Portal interface. The header includes the Ohio logo, "Ohio Grants Portal", and navigation links for "OHIO GRANTS PORTAL" and "MY AWARDS". The main content area is divided into two columns: "Summary" and "Details". The "Summary" column contains the following fields:

- Last Date Submitted
- Reporting Period: 08/01/2020 - 08/02/2020
- Due Date: 09/10/2020
- Beginning Balance: \$0.00
- Total Receipts for Reporting Period: \$0.00 (with a green checkmark and an information icon)
- Interest Earned for Reporting Period: (with a red asterisk and an information icon)
- Total Expenditures for Reporting Period: (with a red asterisk and an information icon)
- Cash On Hand: \$0.00
- Amounts Obligated/Encumbered: \$0.00 (with an information icon)
- Unobligated Balance: \$0.00

Buttons for "Save Summary" and "Submit Activity Report" are located at the bottom of the form. A "Back" button is also present below the form.

- 7) When a value is entered in a required field, a green checkmark will appear. Once complete, click "Save Summary".

The screenshot shows the Ohio Grants Portal interface, similar to the previous one, but with values entered in the required fields. The "Summary" column contains the following fields:

- Last Date Submitted
- Reporting Period: 08/01/2020 - 08/02/2020
- Due Date: 09/10/2020
- Beginning Balance: \$0.00
- Total Receipts for Reporting Period: \$5,000.00 (with a green checkmark and an information icon)
- Interest Earned for Reporting Period: \$5.00 (with a green checkmark and an information icon)
- Total Expenditures for Reporting Period: \$4,000.00 (with a green checkmark and an information icon)
- Cash On Hand: \$1,005.00
- Amounts Obligated/Encumbered: \$1,005.00 (with an information icon)
- Unobligated Balance: \$0.00

Buttons for "Save Summary" and "Submit Activity Report" are located at the bottom of the form. A "Back" button is also present below the form.

- 8) In the Details section beside your Summary reporting, you are required to classify your expenditures by category. Click the “Add New” button to classify your expenditures.

The screenshot displays the Ohio Grants Portal interface. At the top left is the Ohio logo and 'Ohio Grants Portal'. At the top right are 'OHIO GRANTS PORTAL' and 'MY AWARDS' with a user profile icon.

The main content area is divided into two panels:

- Summary Panel:** Contains fields for 'Last Date Submitted' (12/22/2020 3:22:30 PM), 'Reporting Period' (01/01/1900 - 01/01/1900), 'Due Date' (09/10/2020), and 'Beginning Balance' (\$0.00). It also features three input fields with checkmarks and information icons: 'Total Receipts for Reporting Period' (\$5,000.00), 'Interest Earned for Reporting Period' (\$5.00), and 'Total Expenditures for Reporting Period' (\$4,000.00). Other values include 'Cash On Hand \$1,005.00', 'Amounts Obligated/Encumbered' (\$1,005.00), and 'Unobligated Balance \$0.00'. A 'Save Summary' button is at the bottom.
- Details Panel:** Has a header 'Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00'. Below is a table with columns 'Activity', 'Description', and 'Expenditure'. It shows '0 Records Displayed' and '0 Total Records'. An 'Add New Activity' button is on the right. At the bottom, it states 'Total Expenditures: \$0.00' and a red message: 'The Submit Activity Report button will be available once your activity expenditure total in the Details section equals the Total Expenditures for Reporting Period in the Summary section.' A 'Submit Activity Report' button is at the bottom right.

A 'Back' button is located below the Summary panel.

- 9) A pop-up window will generate to allow you to select a project/activity from a drop-down menu, then enter free form text to best describe the project/activity, and list the amount of expenditures for that project/activity. Once complete, click "Save".

The screenshot displays the Ohio Grants Portal interface. A pop-up window titled "Add Activity" is centered on the screen. The pop-up contains the following fields:

- Project/Activity For Expenditure:** A dropdown menu with "Personal Protective Equipment" selected and a green checkmark.
- Describe Project/Activity:** A text input field containing "Masks, gowns, gloves".
- Expenditure Amount:** A text input field containing "\$1,000.00" with a green checkmark.

At the bottom of the pop-up are two buttons: "Save" (red) and "Close" (blue). The background interface shows a "Summary" section on the left with financial data and a "Details" section on the right with a table for activity records. The "Summary" section includes:

- Last Date Submitted: 12/22/2020 3:22:30 PM
- Reporting Period: 01/01/1900 - 01/01/1900
- Due Date: 09/10/2020
- Beginning Balance: \$0.00
- Total Receipts for Reporting Period: \$5,000.00
- Interest Earned for Reporting Period: \$5.00
- Total Expenditures for Reporting Period: \$4,000.00
- Cash On Hand: \$1,005.00
- Amounts Obligated/Encumbered: \$1,005.00
- Unobligated Balance: \$0.00

The "Details" section shows a table with "0 Records Displayed". A "Submit Activity Report" button is visible at the bottom right of the main interface.

10) After clicking save, your activity entered will be presented in the grid as shown below. The Submit Activity button will be grayed out until the total expenditures in the Details section matches the total expenditures in the Summary section.

Ohio Grants Portal

OHIO GRANTS MY  
PORTAL AWARDS

### Summary

Last Date Submitted  
12/22/2020 3:22:30 PM

Reporting Period  
01/01/1900 - 01/01/1900

Due Date  
09/10/2020

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
 ✓ ⓘ

Interest Earned for Reporting Period  
 ✓ ⓘ

Total Expenditures for Reporting Period  
 ✓ ⓘ

Cash On Hand \$1,005.00

Amounts Obligated/Encumbered  
 ⓘ

Unobligated Balance \$0.00

[Save Summary](#)

### Details

Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00

	Activity	Description	Expenditure	
Edit	Personal Protective Equipment	Masks, gowns, gloves	\$1,000.00	Delete

0 Records Displayed 1 Total Records

[Add New Activity](#)


Total Expenditures: **\$1,000.00**  
The Submit Activity Report button will be available once your activity expenditure total in the Details section equals the Total Expenditures for Reporting Period in the Summary section.

[Submit Activity Report](#)


[Back](#)



11) Click “Add New Activity” and continue to do this for each category until all expenditures have been accounted for in a category. You may enter the same activity more than once if you need to separate based on activity description. When the expenditure total in the Details section matches the expenditure total in the Summary section, you will have the ability to submit the activity report.



OHIO GRANTS MY  
 PORTAL AWARDS



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### Summary

Last Date Submitted  
12/22/2020 3:22:30 PM

Reporting Period  
01/01/1900 - 01/01/1900

Due Date  
09/10/2020

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  
 ✓ ⓘ

Interest Earned for Reporting Period  
 ✓ ⓘ

Total Expenditures for Reporting Period  
 ✓ ⓘ

Cash On Hand \$1,005.00

Amounts Obligated/Encumbered  
 ⓘ

Unobligated Balance \$0.00

[Save Summary](#)

### Details

Total Activities should equal Total Expenditures for Reporting Period of \$4,000.00

	Activity ↕	Description ↕	Expenditure ↕		
<b>Edit</b>	Personal Protective Equipment	Masks, gowns, gloves	\$1,000.00	<b>Delete</b>	ⓘ
<b>Edit</b>	Public health expenses	Social distancing measures, touchless faucets, disinfection of public areas	\$2,000.00	<b>Delete</b>	ⓘ
<b>Edit</b>	Small Business Assistance	Small business economic relief grants	\$1,000.00	<b>Delete</b>	ⓘ

0 Records Displayed 3 Total Records

[Add New Activity](#)

Total Expenditures: \$4,000.00

Please click the **Submit Activity Report** button to finalize your Activity Report.

[Submit Activity Report](#)

[Back](#)

12) Once complete click "Submit Activity Report" and a pop-up window will generate notifying you that your activity report was successfully submitted.

The screenshot displays the Ohio Grants Portal interface. A central pop-up window titled "Activity Report Save Notification" contains the message: "Activity Report for Due Date 09/10/2020 was successfully submitted." with an "OK" button. The background shows the "Summary" and "Details" sections of the report.

**Summary**

- Last Date Submitted: 12/22/2020 3:22:30 PM
- Reporting Period: 01/01/1900 - 01/01/1900
- Due Date: 09/10/2020
- Beginning Balance: \$0.00
- Total Receipts for Reporting Period: \$5,000.00 ✓
- Interest Earned for Reporting Period: \$5.00 ✓
- Total Expenditures for Reporting Period: \$4,000.00 ✓
- Cash On Hand: \$1,005.00
- Amounts Obligated/Encumbered: \$1,005.00
- Unobligated Balance: \$0.00

**Details**

Activity	Description	Expenditure	
Personal Protective Equipment	Masks, gowns, gloves	\$1,000.00	Delete
Public health expenses	Social distancing measures, touchless faucets, disinfection of public areas	\$2,000.00	Delete
Small Business Assistance	Small business economic relief grants	\$1,000.00	Delete

0 Records Displayed | 3 Total Records

Total Expenditures: \$4,000.00  
Please click the Submit Activity Report button to finalize your Activity Report.

*You are now finished with your Activity Report. You may go back and edit the report up until the due date of the report.*