



## COMPLETING AN ACTIVITY REPORT

This job aid provides step-by-step instructions on completing an activity report as a Healthy Aging Grants grantee. The quarterly report process includes two main components: 1) fiscal activity report; and 2) program report. These instructions will provide details on how to submit both.

To aid in the preparation and submission of grantee quarterly reports, the [Healthy Aging Grants: Reporting Requirements Training](#) is now available. This training covers all grant reporting prerequisites, providing a guide on how to complete and submit quarterly fiscal activity reports and program reports.

### Using the Portal

The authentication mechanism to access the Ohio Grants Portal and submit activity reporting requires the use of an OH|ID (Ohio's Digital Identity Standard) to login. Users that do not already have an OHID must create a new one first. To create a new OHID, click **Create Account**. When setting up your OH|ID account, please be sure to use the same email address as you did when applying for the funding. Once you receive your OH|ID login credentials, you may login to the Grants Portal. For more information on creating an OHID, Forgot Username, or Forgot Password, please go to [OHID/help](#).

### Completing an Activity Report

- 1) Log into the **Grants Portal**.
  - Open <http://grantsportal.ohio.gov>
- 2) Log in using your **OHID credentials**.

OH|ID  
Ohio's Digital Identity. One State. One Account.  
Register once, use across many State of Ohio websites

Create Account

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Log In

OH|ID  
12345678

Password  
.....

Log in

[Forgot your OH|ID or password?](#) | [Get login help](#)

## COMPLETING AN ACTIVITY REPORT

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- The **Ohio Grants Portal** home page displays.

### My Applications and Awards

 Create new Application

**HB33-ALI490678: Healthy Aging Grants**

ODA Test Application  
30 E Broad Street, Columbus

 [View](#)

 [Activity Reports](#)

- 3) Under My Applications and Awards, locate the funding opportunity and click **Activity Report**.

### My Applications and Awards

 Create new Application

**HB33-ALI490678: Healthy Aging Grants**

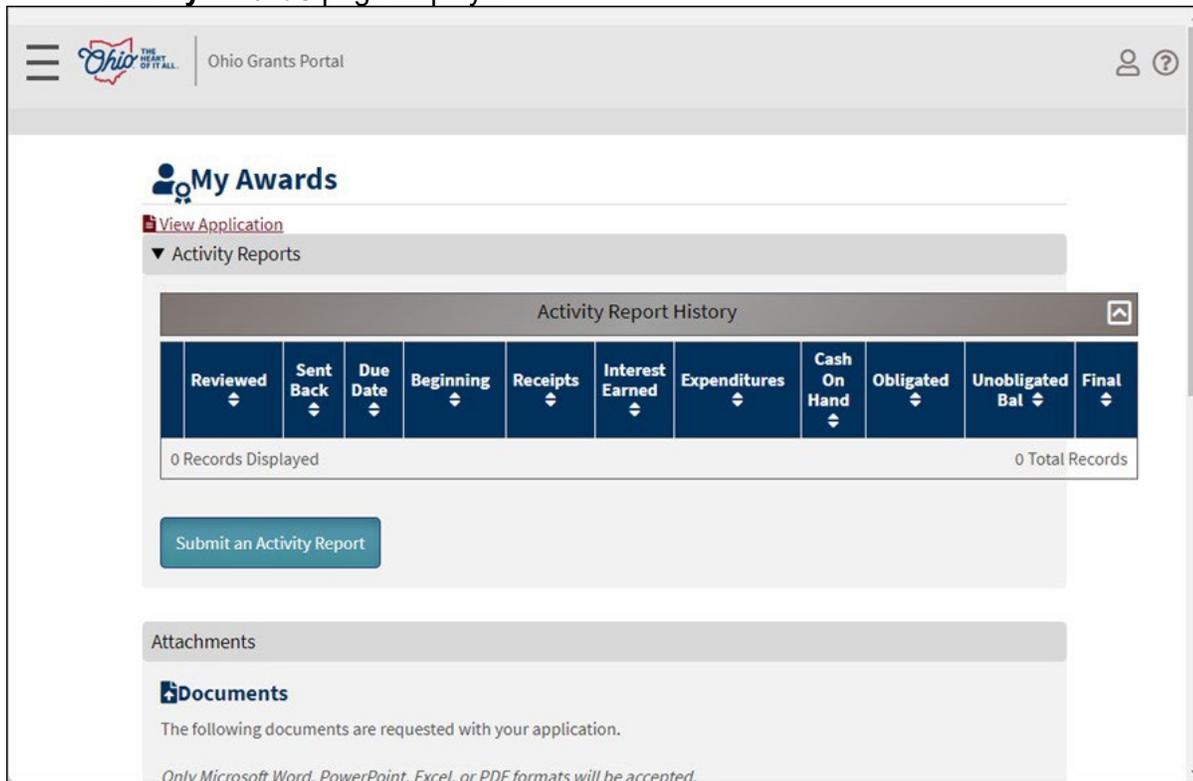
ODA Test Application  
30 E Broad Street, Columbus

 [View](#)

 [Activity Reports](#)

## COMPLETING AN ACTIVITY REPORT

- The **My Awards** page displays.



**My Awards**

[View Application](#)

▼ Activity Reports

Activity Report History

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

[Submit an Activity Report](#)

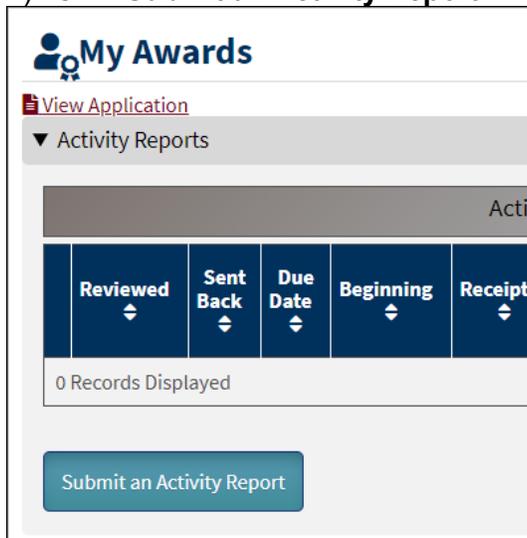
Attachments

**Documents**

The following documents are requested with your application.

*Only Microsoft Word, PowerPoint, Excel, or PDF formats will be accepted.*

- Click **Submit an Activity Report**.



**My Awards**

[View Application](#)

▼ Activity Reports

Acti

Reviewed	Sent Back	Due Date	Beginning	Receipts
0 Records Displayed				

[Submit an Activity Report](#)

## COMPLETING AN ACTIVITY REPORT

- A **Date Notification** window displays.



5) Click **Yes**.

- The **Activity Report Subrecipient** page displays.

### Activity Report Subrecipient

#### Summary

Last Date Submitted  
12/5/2023 9:09:02 AM

Reporting Period  
10/01/2023 - 12/31/2023

Due Date  
01/10/2024

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  ✓

Interest Earned for Reporting Period  ✓

Total Expenditures for Reporting Period  ✓ ⓘ

Cash On Hand \$100,000.00

Amounts Obligated/Encumbered  ⓘ

Unobligated Balance \$100,000.00

Reviewed?

Close Out Report? ⓘ

[Save Summary](#)

#### Details

Total Activities should equal Total Expenditures for Reporting Period of \$25,000.00

Activity	Description	Expenditure
0 Records Displayed		

0 Total Records

[Add New Activity](#)

Total Expenditures: **\$0.00**  
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](#)



## COMPLETING AN ACTIVITY REPORT

- 6) Under Summary, enter:
  - **Total Receipts for Reporting Period**,
    - For Report 1, enter the total award you received from ODA.
    - For Report 2-5, only enter \$ here **if** you have received **additional** funds from ODA by way of a secondary Notice of Grant Award (NGA). If you have not received any more funds, enter "\$0.00".
  - **Interest Earned for Reporting Period** – enter "\$0.00"
  - **Total Expenditures for Reporting Period**, and
  - **Amounts Obligated/Encumbered**.
- 7) When reporting the final expenditures for your award, submit a close out activity report by checking **Close Out Report?**.
  - Close Out is disabled when an amount other than 0 is entered for **Amounts Obligated/Encumbered**. You cannot complete close out when funds are encumbered.
- 8) Click **Save Summary**.

### Activity Report Subrecipient

#### Summary

Last Date Submitted  
12/5/2023 9:09:02 AM

Reporting Period  
10/01/2023 - 12/31/2023

Due Date  
01/10/2024

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  ✓ 

Interest Earned for Reporting Period  ✓ 

Total Expenditures for Reporting Period  ✓ 

Cash On Hand \$75,000.00

Amounts Obligated/Encumbered  

Unobligated Balance \$25,000.00

Close Out Report? 

 Back

## COMPLETING AN ACTIVITY REPORT

- The **Details** section displays.

### Activity Report Subrecipient

#### Summary

Last Date Submitted  
12/5/2023 9:09:02 AM

Reporting Period  
10/01/2023 - 12/31/2023

Due Date  
01/10/2024

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  ✓

Interest Earned for Reporting Period  ✓

Total Expenditures for Reporting Period  
 ✓ ⓘ

Cash On Hand \$75,000.00

Amounts Obligated/Encumbered  ⓘ

Unobligated Balance \$25,000.00

Close Out Report? ⓘ

[Save Summary](#)

#### Details

Total Activities should equal Total Expenditures for Reporting Period of \$25,000.00

Activity	Description	Expenditure
0 Records Displayed		

0 Total Records

[Add New Activity](#)

Total Expenditures: \$0.00  
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](#)

### 7) Click **Add New Activity**.

- The Add Activity window displays.

#### Add Activity

Project/Activity For Expenditure  
*Please select an item in the list.*

▼

Describe Project/Activity

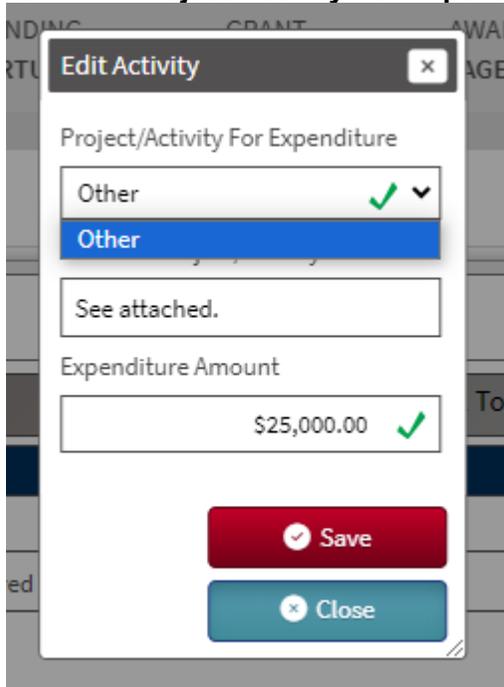
Expenditure Amount  
*Please fill out this field.*

- Form Incomplete -

[Close](#)

## COMPLETING AN ACTIVITY REPORT

- 8) Click the **Project/Activity For Expenditure** dropdown and choose a “other”.

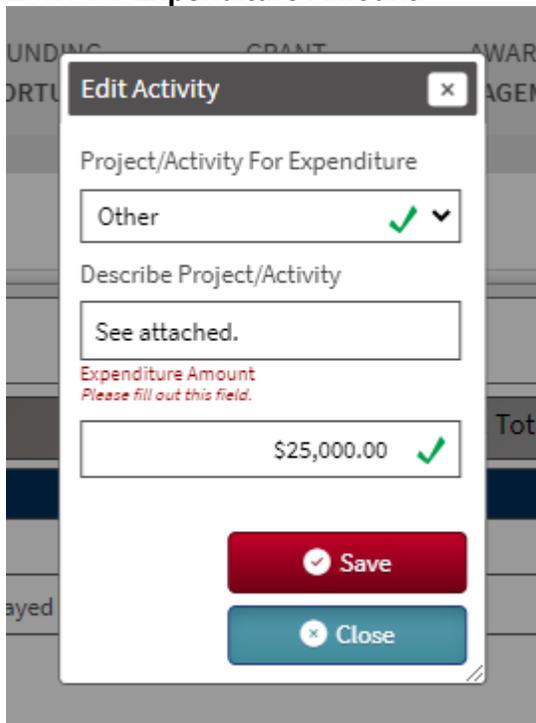


The screenshot shows a modal window titled "Edit Activity" with a close button (x) in the top right corner. The form contains the following fields and controls:

- Project/Activity For Expenditure:** A dropdown menu is open, showing "Other" as the selected option with a green checkmark and a downward arrow. The "Other" option is highlighted in blue.
- Describe Project/Activity:** A text input field containing "See attached."
- Expenditure Amount:** A text input field containing "\$25,000.00" with a green checkmark to its right.
- Buttons:** A red "Save" button with a white checkmark icon and a blue "Close" button with a white 'x' icon.

- 9) Enter a response in the **Describe Project/Activity** field. You may enter “see attached” or leave blank

- 10) Enter the **Expenditure Amount**.



The screenshot shows the same "Edit Activity" modal window. The form is now updated as follows:

- Project/Activity For Expenditure:** The dropdown menu is closed, and "Other" is displayed in the field with a green checkmark and a downward arrow.
- Describe Project/Activity:** The text input field now contains "See attached."
- Expenditure Amount:** The text input field contains "\$25,000.00" with a green checkmark to its right. Below the field, there is a red error message: "Expenditure Amount Please fill out this field."
- Buttons:** The red "Save" button and blue "Close" button are still present.

## COMPLETING AN ACTIVITY REPORT

### 11) Click **Save**.

- The Detail Edit line displays.
- You only need to add **ONE** activity/reporting period.
- The **Submit Activity Report** button will become available once the activity expenditure total in the **Details** section equals the **Total Expenditures for Reporting Period** in the **Summary** section (indicated by Total Expenditures in green below).

#### Activity Report Subrecipient

#### Summary

Last Date Submitted  
12/5/2023 9:09:02 AM

Reporting Period  
10/01/2023 - 12/31/2023

Due Date  
01/10/2024

Beginning Balance  
\$0.00

Total Receipts for Reporting Period  ✓

Interest Earned for Reporting Period  ✓

Total Expenditures for Reporting Period  ✓

Cash On Hand \$75,000.00

Amounts Obligated/Encumbered  ⓘ

Unobligated Balance \$25,000.00

Reviewed?

Close Out Report? ⓘ

[Save Summary](#)

#### Details

Total Activities should equal Total Expenditures for Reporting Period of \$25,000.00

	Activity	Description	Expenditure		
<a href="#">Edit</a>	Other	See attached.	\$25,000.00	<a href="#">Delete</a>	<a href="#">ⓘ</a>

1 Record Displayed 1 Total Records

[Add New Activity](#)

Total Expenditures: **\$25,000.00**  
Please click the [Submit Activity Report](#) button to finalize your Activity Report.

[Submit Activity Report](#)

[Back](#)

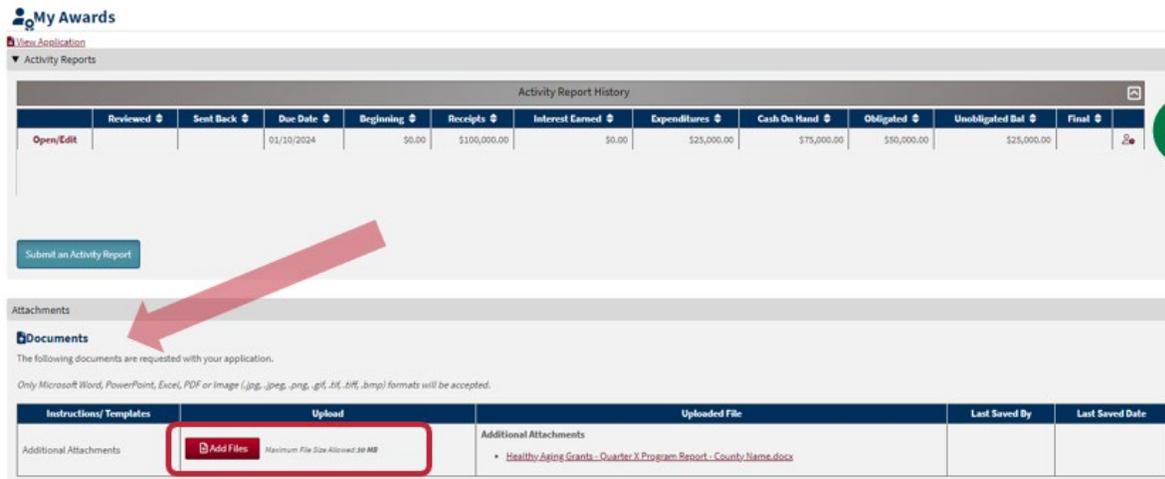
### 12) Click **Submit Activity Report**.

Submit Activity Report button to finalize your Activity Report.

[Submit Activity Report](#)

## COMPLETING AN ACTIVITY REPORT

- 13) Next, you will need to submit your quarterly program report.
- Complete the *Healthy Aging Grants Quarterly Report Template* and “add file” under “documents”.
  - The program report must be completed and submitted each quarter.
  - Use the following file naming convention:
    - **Healthy Aging Grant – Quarter X Program Report – County Name**



**My Awards**

View Application

Activity Reports

Open/Edit	Reviewed	Sent Back	Due Date	Beginning	Receipts	Interest Earned	Expenditures	Cash On Hand	Obligated	Unobligated Bal	Final
			01/10/2024	\$0.00	\$100,000.00	\$0.00	\$25,000.00	\$75,000.00	\$50,000.00	\$25,000.00	

Submit an Activity Report

Attachments

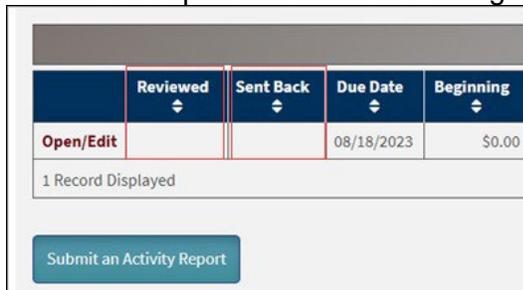
**Documents**

The following documents are requested with your application.

Only Microsoft Word, PowerPoint, Excel, PDF or Image (.jpg, .jpeg, .png, .gif, .tif, .bmp) formats will be accepted.

Instructions/Templates	Upload	Uploaded File	Last Saved By	Last Saved Date
Additional Attachments	<b>Add Files</b> <small>Maximum File Size Allowed: 20 MB</small>	Additional Attachments		
		• <a href="#">Healthy Aging Grants - Quarter X Program Report - County Name.docx</a>		

- 14) On the My Awards page, a date in the Reviewed column indicates the report was reviewed and accepted. A date in the Sent Back column indicates the report was sent back for adjustments. Review the report and make the changes required.



Open/Edit	Reviewed	Sent Back	Due Date	Beginning
			08/18/2023	\$0.00

1 Record Displayed

Submit an Activity Report

### Additional questions?

- Visit our website: <https://aging.ohio.gov/healthy-aging>
- Contact us: [HealthyAgingGrants@age.ohio.gov](mailto:HealthyAgingGrants@age.ohio.gov)