SERVE OHIO

Ohio Commission on Service and Volunteerism

ServeOhio's Grant Management System Guide

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Click Here for ServeOhio's Grant Management System

Creating Your Account

1. Click the blue "Register" button.
2. Fill out the required information for your personal account.
   a. Note: Password must include 8 characters, one uppercase letter, one lowercase letter, one number and one special character.
3. Click "Create Account" button.
4. Click "Continue to site".
5. Complete required information for your organization profile.
   a. Note: if your organization already has a profile, the organization administrator should add you as a collaborator separately using the steps to Managing Your Organization.
6. Click "Continue".
7. Click "Continue to site".
8. Verify your email using the link emailed to you.
9. Navigate to our grant programs by clicking "View Programs".

Applying for a Grant

1. Navigate to the grant you are interested in and click "More".
2. Review grant information.
3. When ready, click the "Apply" button.

National Days of Service Grant Application

1. After clicking the "Apply" button, the first task is eligibility. Click "Eligibility" under "Your tasks".
2. Please answer each question and click "Mark as complete".
3. If your organization operates in Ohio, is not a for-profit entity, and the project occurs during the project window, you are eligible for the grant and the Project Grant Application with automatically become an option on the lefthand sidebar.
4. Click "Project Grant Application" on the lefthand sidebar.
5. Once completing all fields and signing the application, click "Mark as complete".
6. After reviewing your application, click the blue "Submit" button on the lefthand sidebar.
    a. Please note, changes can not be made to the application once submitted.
    b. Please note, only the application owner will see the submit button. The application is not submitted until the submit button has been clicked AND confirmed. See "Changing the 'Owner' of the Application" for steps to change the application owner.
7. Confirm your submission of the application in the pop up window by clicking the blue "Submit" button.

All applications will be notified of funding decisions via email to the primary administrator for the applicant organization.

Ohio Conference on Service and Volunteerism Request for Proposals

1. After clicking the "Apply" button, click "Proposal Form" under "Your Tasks".
2. Once completing all fields and signing the proposal, click "Mark as complete".
3. After reviewing your proposal, click the blue "Submit" button on the lefthand sidebar.
    a. Please note, changes can not be made to the proposal once submitted.
    b. Please note, only the application owner will see the submit button. The application is not submitted until the submit button has been clicked AND confirmed. See "Changing the 'Owner' of the Application" for steps to change the application owner.
4. Confirm your submission of the proposal in the pop up window by clicking the blue "Submit" button.

National Days of Service Grantee Resources

Notice of Grant Award

If selected, the next step as a grantee is to complete the Notice of Grant Award.

1. Log in to the grants management system.
2. Under my applications, click "Start".
3. If you are the correct signatory, skip to step 6. If not, the correct signatory will need to be made the owner. Use the steps Changing the "Owner" of Your Application to do so then they will be able to complete the Notice of Grant Award.
4. Under "Your tasks", click "Notice of Grant Award".
5. Once all fields are completed and signed by the appropriate officer, click "Mark as complete".
    a. *Please note: AmeriCorps Members are not eligible to sign the Notice of Grant Award on behalf of their program or host site.*

Reporting

In order to be reimbursed for project expenditures, grantees must complete, certify, and submit a written final project report, a Spending Documentation and Reimbursement Request, and any associated receipts/invoices. Reports are available on the grants management system immediately following the completion of the Notice of Grant Award but should not be completed until the project is completed.
*(*Note: In the event the grantee fails to adequately document project completion, ServeOhio reserves the right to reduce or eliminate support provided under the Notice of Grant Award.)*

All grantees must attend the webinar where reporting will be discussed in depth.

Actual expenditures may vary reasonably from the estimated budget included in the application but may not exceed the amount listed on the Notice of Grant Award.

As a reminder, funds may be used for supplies/materials and volunteer support.

Funds may NOT be used for staffing, travel costs, gift cards, awards, grantee administration, or grantee overhead costs.

Supplies/materials may include small equipment (useful life of two years or more) up to $100 unit cost.

Final Project Report

1. Log in to the grants management system.
2. Under "All Applications", click "Start" for the correct grant.
3. Under "Your tasks", click "Final Project Report".
4. Complete all required fields. See below for information regarding each field.

Field	Details
Project Information	
Organization Name	Organization name that is listed in your Notice of Grant Award will auto-populate
Project Manager Name	The primary project/grant manager
Project Manager Email	The primary project/grant manager's email

Project Location	The name of where the volunteer project physically occurred (i.e. Smith Park)
Project Address	The address of where the volunteer project physically occurred. *Be sure to include address, city, state, and zip code.*
Project Date	What date or dates any volunteer work related to the project occurred
Project Start Times	The start times to any volunteer work
Project End Times	The end times to any volunteer work
Total Reimbursement Requested	The dollar amount you are requesting reimbursement for (*Note*: this number should match the total amount requested in the Spending Documentation and Reimbursement Request and should not exceed the amount awarded in the Notice of Grant Award)
Ohio Supplier ID Number	The 10-digit number that you received when registering as a state supplier
Volunteers and Hours	
Total Number of Youth Volunteers Engaged	The number of unique youth volunteers engaged relating to the project. Youth is defined as any volunteer under 24 years old
Total Number of Youth Service Hours	The cumulative total of hours of all volunteer work related to the project by youth
Total Number of Adult Volunteers Engaged	The number of unique adult volunteers engaged relating to the project. Adult is defined as any volunteer 24 years or older
Total Number of Adult Service Hours	The cumulative total of hours of all volunteer work related to the project by youth
Project Report	
Describe your project	Describe your project including services performed, volunteer participation and activities, and the impact of the service. Please include any collaborations and lessons learned
Project Photos	Upload photos from the project as jpgs. (*Note:* any photos submitted may be used in ServeOhio's promotional material)
Supplemental Documents	Upload any supplemental documentation of the project such as press releases, media engagements, social media posts, flyers, etc.)
Signatory Information	
Organization Signatory Signature	Please sign the report.
Organization Signatory Name	List signatory name.
Organization Signatory Title	List signatory title.
Date	List date of signing. (*Note*: current date will auto-populate).
Signing Authority Acknowledgement	Check the checkbox to notate that the signatory has signing authority for the organization. (*Note*: AmeriCorps Members are not eligible to sign the Final Project Report on behalf of their program or host site.)

5. Once complete and reviewed, click "Mark as complete".

Spending Documentation and Reimbursement Request

1. Log in to the grants management system.
2. Under “All Applications”, click “Start” for the correct grant.
3. Under “Your tasks”, click “Spending Documentation and Reimbursement Request”.
4. Complete all required fields. See below for information regarding each field.

Field	Details
Project Information	
Grant Award Number	Grant Award Number that is listed in your Notice of Grant Award will auto-populate
Grantee Name	Organization name that is listed in your Notice of Grant Award will auto-populate
Project Title	The name of the project (ie. MLK Day Hygiene Kits)
Remit to Address	The address to which payment should be made. *Be sure to include address, city, state, and zip code. MUST MATCH THE ADDRESS IN OHIOPAYS.*
Purchases	
Vendor	Should match the vendor’s name listed on the receipt
Purchase Description	A brief explanation of what was purchased (example: gardening tools) *This field should not be a list of every item purchased from that vendor
Amount Paid From Grant	Amount you are requesting reimbursement from the grant
Total Cost	The total cost of all items on the receipt
Purchase Date	Must match the date on the receipt or invoice
Upload Receipts	
Upload Receipts	All purchases must correspond to a receipt or invoice. • Receipts must legible and include the entire receipt, including the vendor name, total amount, date, and a payment method. • *Receipts must be itemized*. If the vendor is unable to give you an itemized receipt, you must include a copy of the menu with each item that was purchased highlighted, and a quantity denoted. If a menu is not available, the vendor must provide a letter that includes an itemized listing of items purchased, vendor name, purchase date, total purchase amount, and payment method.
Signatory Information	
Signature	Please sign the report.
Date	List date of signing. (*Note*: current date will auto-populate).
Signatory Name	List signatory name.
Signatory Title	List signatory title.
Signatory Phone Number	List signatory phone number.
Signatory Email	List signatory email.
Signing Authority Acknowledgement	Check the checkbox to notate that the signatory has signing authority for the organization. (*Note*: AmeriCorps Members are not eligible to sign the Spending Documentation and Reimbursement Request on behalf of their program or host site.)

5. Once complete and reviewed, click "Mark as complete".

Review both the Final Project Report and Spending Documentation, then click the blue "Submit" button. Confirm your submission by clicking the blue "Submit" button again.

Please note, only the application owner will see the submit button. The application is not submitted until the submit button has been clicked AND confirmed. See "Changing the 'Owner' of the Application" for steps to change the application owner.

If edits to the reports are required, the primary manager for the organization will receive an email. Follow the steps below to edit the reports:

1. Log in.
2. Under "All Applications", click "Continue".
3. Navigate to the report that needs to be edited.
4. Click the 3 dots in the top right corner.
5. Select "Edit".
6. Make the necessary edits to the report.
7. Click "Mark as Complete".
8. Repeat for other report if needed.
    a. Click the blue "Submit" button once all edits are completed. Please note, only the application owner will see the submit button. The application is not submitted until the submit button has been clicked AND confirmed. See "Changing the 'Owner' of the Application" for steps to change the application owner.
9. Confirm your submission by clicking the blue "Submit" button again.

Once both reports have been submitted and approved, ServeOhio will process payment within 30 business days.

ServeOhio Awards

1. Once logged in, navigate to “Programs” using the top navigation bar.
2. In the ServeOhio Awards box, click “More”.
3. Once reviewing the awards information, click “Apply” to begin your nomination form.
4. Under “Your Tasks”, click “Nomination Type” to identify the type of nomination you will be submitting.
5. Select the type of nomination type.
    a. *Please note*:
        i. Youth is defined as any individual or group under 24 years old and adult is defined as 24 years or older.
        ii. Group is defined as 3 or more individuals
6. One the correct type is selected, click “mark as complete”.
7. The nomination form for the type of nomination you wish to submit will automatically appear in the left sidebar. Click the title to begin (i.e. “Nomination Form – Individual Adult”).
8. Complete the required fields on the form.
    a. *Please note*: supporting documentation is limited to 3 items and can be submitted as pdfs or jpgs.
9. Once complete, click the “Mark as Complete” button.
10. After reviewing your nomination, click the blue “Submit” button on the lefthand sidebar.
    a. Please note, changes can not be made to the nomination once submitted.
    b. Please note, only the application owner will see the submit button. The nomination is not submitted until the submit button has been clicked AND confirmed. See “Changing the ‘Owner’ of the Application” for steps to change the application owner.
11. Confirm your submission of the nomination in the pop up window by clicking the blue “Submit” button.
12. You will receive a pop-up window and a confirmation email confirming receipt of the nomination.

Managing Your Organization

1. Once logged in, click “Manage organization”.

Organization Info

2. Under Profile, you can add and edit organization information.
   a. Make any necessary edits.
   b. Click “Save”.

Adding Members

3. Under Members, you can add collaborators.
   a. Click the “Add member” button.
   b. Input the name and email address for the person you would like to add.
   c. Select their role.

Role	Description
Organization Administrator	These members have similar control over the organization's members and applications as the Primary Administrator. However, they will only be able to edit and remove non-administrative members, or inactive Administrators.
Non-Administrator	These members will be able to edit applications on behalf of the organization but will not have access to manage the organization's profile and members. They will also not be able to create or submit applications for an organization.

   d. Optional: Select the notify the user checkbox.
      i. If the user does not already have an account in the system ,they will receive an invite and be able to create a password to log in.
   e. Click “Add”.

Changing the “Owner” of Your Application

You may have to change the owner of the application to allow them to edit tasks. Follow the steps below to do so.

1. If the individual does not have an account yet, see the steps to Managing Your Organization for instructions on adding a member. If the individual has an account, continue to step 2.
2. Navigate to the task you are working on.
3. Under your organization’s name, locate the user that should be the signory and click the 3 dots next to their name.
4. Click “Make Owner”.
   a. *Please note: You can change the owner back after completing the form.*