

EI Office Hours

February 23, 2026



MIKE DEWINE
GOVERNOR OF OHIO



MOMENTUM

Communication – keeping you informed and connected

Transparency – sharing updates and decisions clearly

Responsiveness – addressing questions and concerns promptly

AGENDA

EI Updates

- Policy and Monitoring (on vacation)
- Professional Development
- TA and Training
- System of Payment/Assistive Technology
- Grants, Contracts, Fiscal
- We'll open the floor for questions and look forward to a thoughtful conversations.

UPDATES



POLICY/MONITORING

UPDATES



POLICY/PD

UPDATES



PROFESSIONAL
DEVELOPMENT

CREDENTIALING/CERTIFICATION UPDATES

- ➔ New [EISC Credential Application User Guide](#)
- ➔ [CPD Tracker](#) – will be required for **renewals** of all 5 Year **DS**, **EISC**, and **EISC Supervisor**, and **Transition** credentials beginning March 2, 2026.
- ➔ New EI Training Inbox – EITraining@childrenandyouth.ohio.gov
- ➔ Informational Webinar – February 26 @ 10AM. [Register here.](#)
- ➔ Donuts with Di Recordings

UPDATES



TA AND TRAINING

SYSTEM OF PAYMENT

- Assistive Technology
- Changes for the Nutrition Grant.
- Changes with Motion Mobility.
- Lindsay Morrison is available to assist with questions related to submissions or vendor coordination.

GRANTS



GMS



EXPENSES



AMENDMENTS

DCY Grants Management System (GMS) Portal Access and Navigation

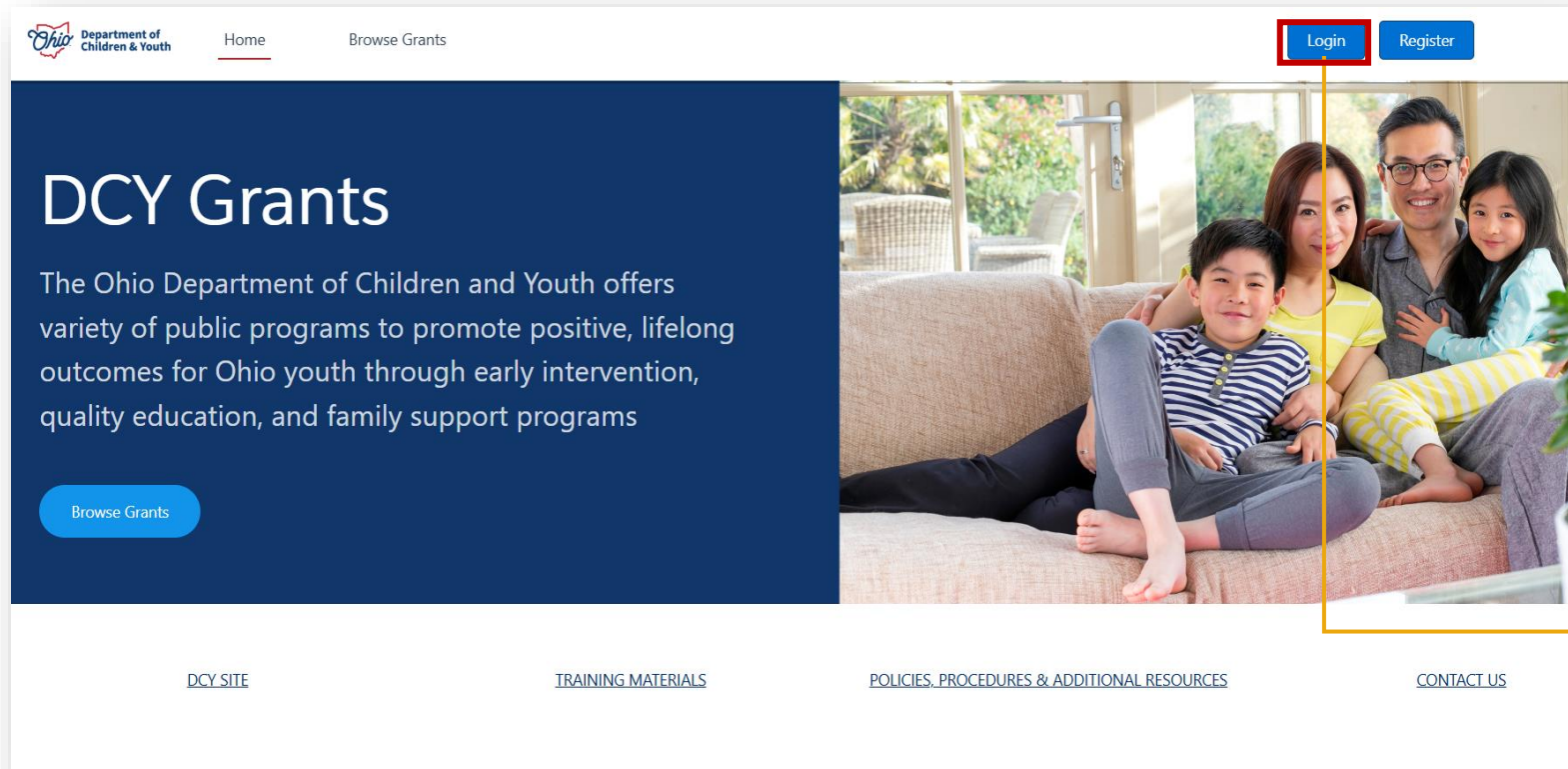
DCY GMS Portal Training Handout

DCY GMS PORTAL ACCESS AND NAVIGATION:

NAVIGATION BANNER OVERVIEW

NAVIGATION BANNER OVERVIEW

The below screenshot provides a visual of the DCY GMS Portal Homepage.



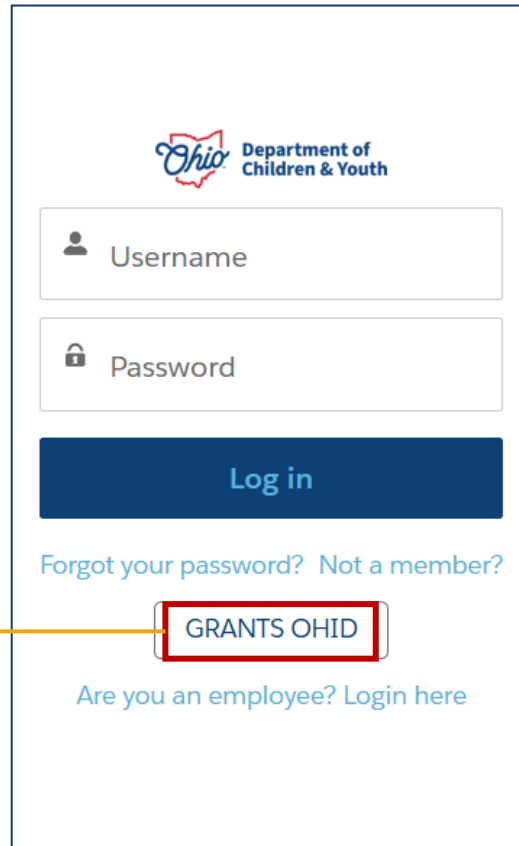
DCY GMS Portal Homepage: Once you complete the Account Set Up steps, you will receive a confirmation email from noreply@salesforce.com that contains a link to the GMS Portal for login.

Navigate to the DCY GMS Portal Homepage (linked [HERE](#)) and select “Login”

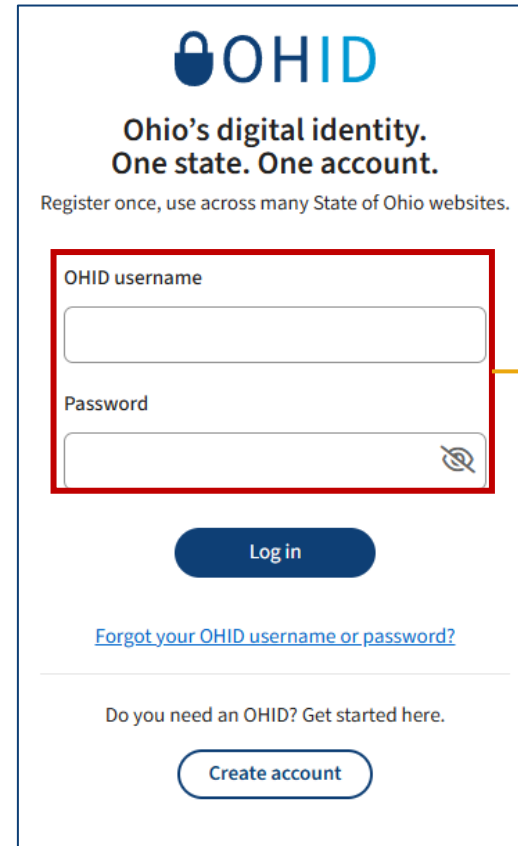
NAVIGATION BANNER OVERVIEW

The below screenshots provide a visual introduction to the DCY GMS Portal Login Page.

Login Screen: The page below will appear after clicking the DCY GMS Portal login link. Click **“GRANTS OHID”** to open the OHID Single Sign On (SSO) Login page to proceed to the DCY GMS Portal.



The screenshot shows the DCY GMS Portal Login Page. At the top left is the Ohio Department of Children & Youth logo. Below it are two input fields: "Username" and "Password". A dark blue "Log in" button is centered below the fields. Below the button are links for "Forgot your password?" and "Not a member?". At the bottom, a red-bordered box highlights the "GRANTS OHID" button. Below this box is a link for "Are you an employee? Login here".



The screenshot shows the OHID SSO Login Page. At the top is the OHID logo with the tagline "Ohio's digital identity. One state. One account." and the text "Register once, use across many State of Ohio websites." Below this are two input fields: "OHID username" and "Password". A red-bordered box highlights these two fields. Below the fields is a dark blue "Log in" button. Below the button is a link for "Forgot your OHID username or password?". At the bottom, there is a link for "Do you need an OHID? Get started here." and a "Create account" button.

SSO OHID Login: The SSO OHID login page prompts you to log in with your OHID and password.

Be sure to use **your 8-digit OH|ID number** not your OHID username. You may need to complete the two-step verification to successfully log in.

NAVIGATION BANNER OVERVIEW

The below screenshot provides a visual of the landing page of the DCY GMS Portal once you have successfully logged in.

Homepage Access: Once you have logged in, use the Navigation Banner at the top to move through the system.

DCY GMS Portal Tips and Tricks

If only “Home” and “Browse Grants” appear, you’re not logged in yet.

The screenshot shows the DCY GMS Portal landing page. At the top, a navigation banner contains the following links: Home, Browse Grants, My Applications, My Awards, My Agency Profile, and More. A red box highlights the Home and Browse Grants links. Below the navigation banner is a large blue banner with the text "DCY Grants" and a description of the department's programs. To the right of the blue banner is a photograph of a family sitting on a couch. Below the blue banner is a table of applications. The table has the following columns: Application ID, Subgrantee, Submitted Date, Grant, Application Status, and Created Date. The table contains one row of data.

Application ID	Subgrantee	Submitted Date	Grant	Application Status	Created Date	
1	IA-0000000774	Test 3	8/4/2025	Smart Cities Grant	Draft	8/4/2025, 2:15 PM

NAVIGATION BANNER OVERVIEW

The below screenshot provides a visual of the landing page of the DCY GMS Portal once you have successfully logged in.

DCY Grants

The Ohio Department of Children and Youth offers variety of public programs to promote positive, lifelong outcomes for Ohio youth through early intervention, quality education, and family support programs

[Browse Grants](#)

My Worklist

Individual Applications
Applications in Progress ▾

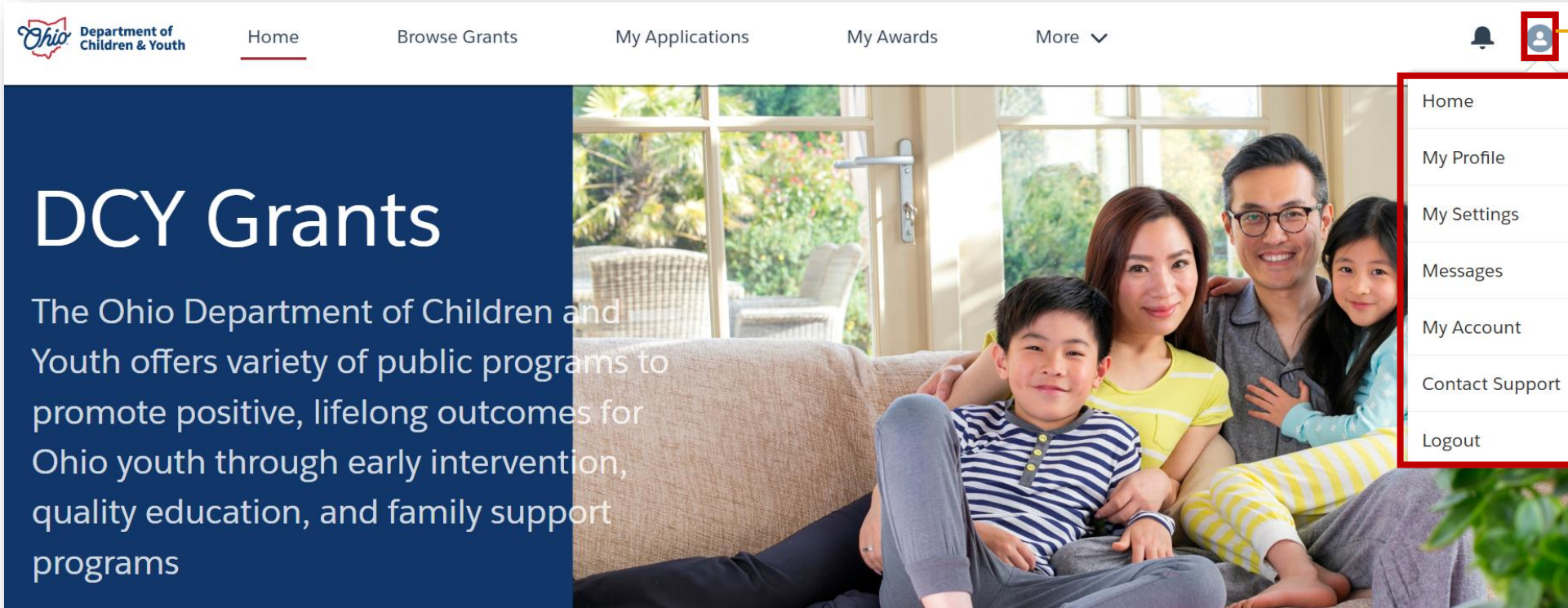
1 item • Sorted by Application ID • Filtered by All individual applications - Application Status • Updated a few seconds ago

Application ID ↑	Subgrantee	Submitted Date	Grant	Application Status	Created Date
1 IA-0000000774	Test 3	8/4/2025	Smart Cities Grant	Draft	8/4/2025, 2:15 PM

Notifications Center: Stay updated on your applications, grants, and awards. New alerts will appear here whenever important account activity occurs.

NAVIGATION BANNER OVERVIEW

The below screenshot provides a visual of the landing page of the DCY GMS Portal once you have successfully logged in.



- Account Dropdown:**
Click the person icon next to Notifications to open a dropdown with options. Here is an overview of a few key items:
- **My Profile** – view your user profile details
 - **My Settings** – update profile info, time zone, language, and email preferences
 - **My Account** – view account settings
 - **Logout** – exit the portal

DCY GMS PORTAL ACCESS AND NAVIGATION:

“HOME” TAB

HOMEPAGE

The below screenshot provides a visual of the Home tab of the DCY GMS Portal.

The screenshot shows the DCY GMS Portal Home page. At the top, there is a navigation banner with the following items: the Ohio Department of Children & Youth logo, a 'Home' tab (highlighted with a red box), 'Browse Grants', 'My Applications', 'My Awards', 'My Agency Profile', and a 'More' dropdown menu. Below the navigation banner is a large blue section with the heading 'DCY Grants' and the text: 'The Ohio Department of Children and Youth offers variety of public programs to promote positive, lifelong outcomes for Ohio youth through early intervention, quality education, and family support programs'. A 'Browse Grants' button is located below this text. To the right of the text is a photograph of a family sitting on a couch. Below this section is a 'My Worklist' section with a sub-heading 'Individual Applications' and a filter 'Applications in Progress'. Below the filter, there is a table with one item. The table has columns for Application ID, Subgrantee, Submitted Date, Grant, Application Status, and Created Date.

Application ID ↑	Subgrantee	Submitted Date	Grant	Application Status	Created Date
1 IA-0000000774	Test 3	8/4/2025	Smart Cities Grant	Draft	8/4/2025, 2:15 PM

Home Tab: Clicking on the “Home Tab” within the Navigation Banner returns you to the main landing page from anywhere in the system.

HOMEPAGE

The below screenshot provides a visual of the Home tab of the DCY GMS Portal.

My Worklist: The “My Worklist” section is located on the Home page. By default, it displays “All Individual Applications,” which provides an overview of your organization’s current applications.

The screenshot shows the homepage of the DCY GMS Portal. At the top, there is a navigation bar with links for "My Applications", "Awards", and "More". Below the navigation bar is a hero section with a blue background and white text that reads "Ohio youth through early intervention, quality education, and family support programs". A blue button labeled "Browse Grants" is positioned in the lower left of the hero section. The background image shows a family sitting on a couch. Below the hero section is the "My Worklist" section, which is highlighted with a red border. It features a sub-header "My Worklist" and a dropdown menu for "All Individual Applications". Below the dropdown, there is a summary line: "1 item • Sorted by Application ID • Filtered by All individual applications • Updated 2 minutes ago". To the right of this line are icons for settings and refresh. Below the summary line is a table with the following data:

	Application ID ↑	Grant	Subgrantee	Created Date	Submitted D...	Applicatio...	Programmat...	
1	IA-0000000774	Smart Cities Grant	Test 3	8/4/2025, 2:15 PM	8/4/2025	Draft	Divya Peri	▼

HOMEPAGE

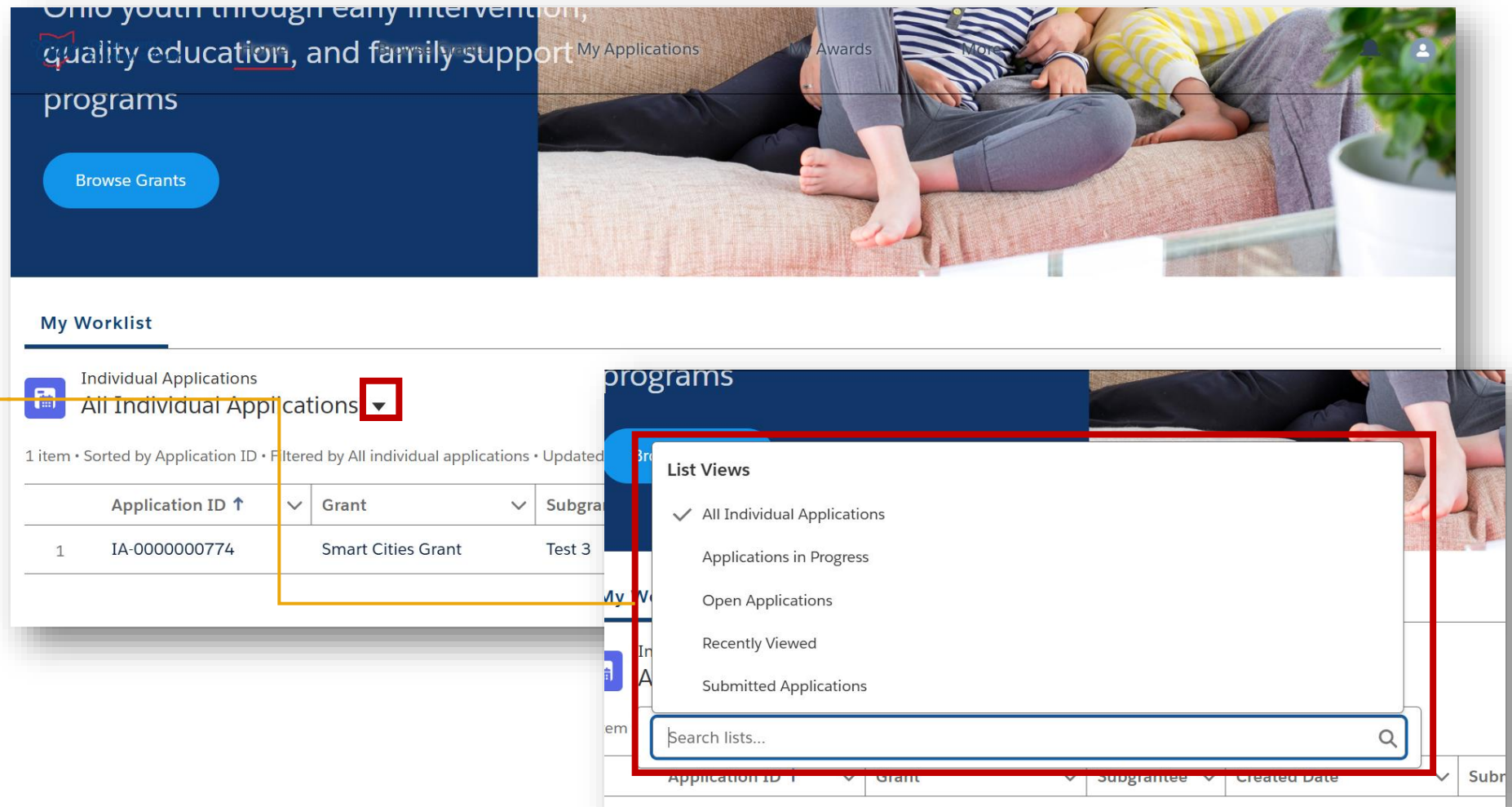
The below screenshot provides a visual of the Home tab of the DCY GMS Portal.

Changing the List View on My Worklist:

To change the information displayed in the “My Worklist” section, click the small dropdown arrow next to “All Individual Applications.”

This opens a dropdown menu with several view options, such as:

- Applications in Progress
- Open Applications
- Recently Viewed
- Submitted Applications



DCY GMS PORTAL ACCESS AND NAVIGATION:

“MY APPLICATIONS” TAB

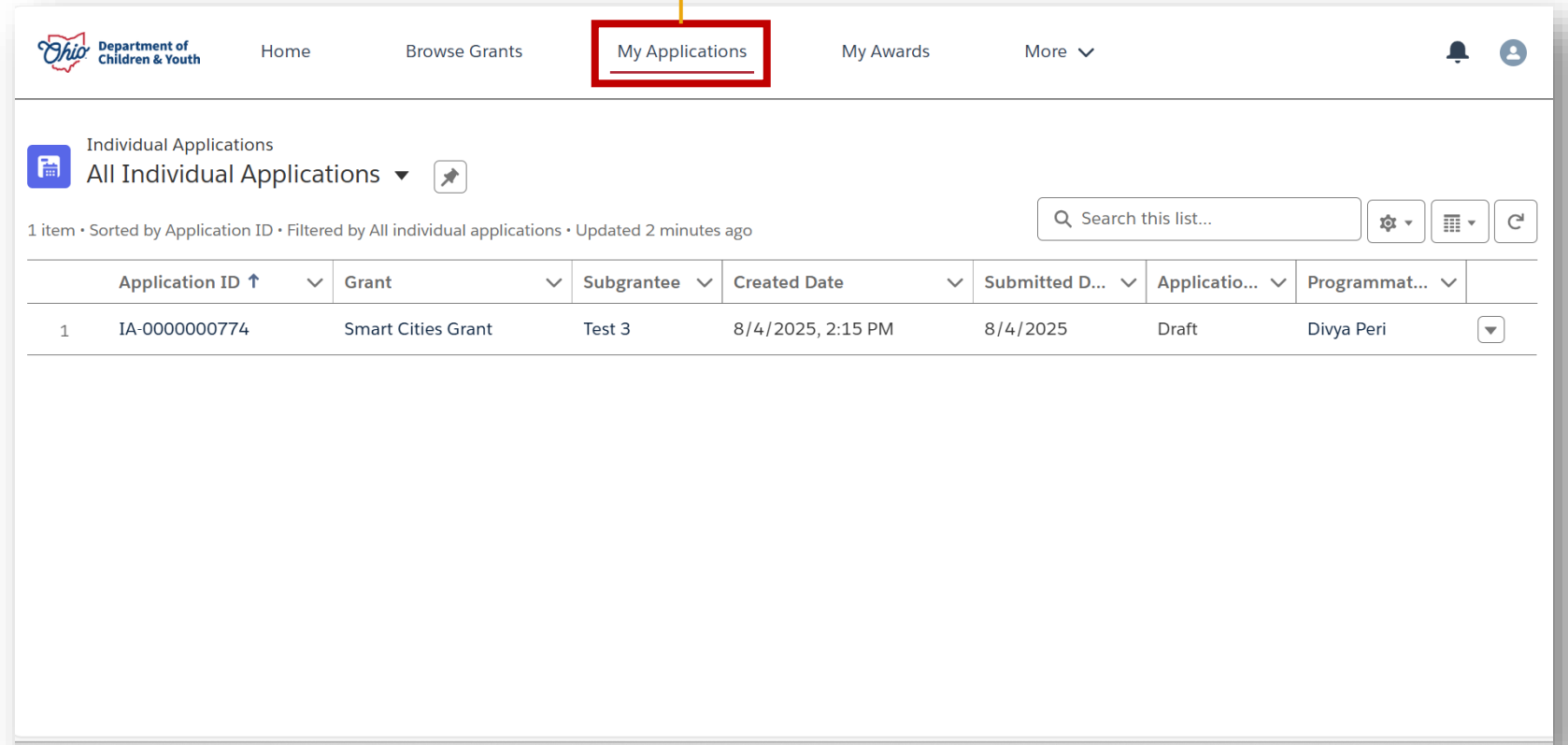
MY APPLICATIONS TAB

The below screenshot provides a visual of the My Applications tab of the DCY GMS Portal.

My Applications Tab: This section displays all the applications your agency/organization has submitted or worked on.

On this page, you'll see a table with several key columns:

- **Application ID:** The unique identifier for each application.
- **Grant:** The name of the grant associated with the application.
- **Subgrantee:** Your agency/organization's name.
- **Created Date:** The date the application was started.
- **Submitted Date:** The date the application was submitted. If this field is blank, it means the application hasn't been submitted yet.
- **Application Status:** The current status of the application.



The screenshot shows the 'My Applications' tab selected in the DCY GMS Portal. The page displays a table of individual applications. The table has the following columns: Application ID, Grant, Subgrantee, Created Date, Submitted Date, Application Status, and Program Manager. A single application is listed with the following details:

Application ID	Grant	Subgrantee	Created Date	Submitted Date	Application Status	Program Manager
1 IA-0000000774	Smart Cities Grant	Test 3	8/4/2025, 2:15 PM	8/4/2025	Draft	Divya Peri

MY APPLICATIONS TAB

The below screenshot provides a visual of the My Applications tab of the DCY GMS Portal.

My Applications Tab Features:

All of the features of this page are consistent with those on the “Browse Grants” page. This includes features like:

- **Dropdown filters** : Click on the dropdown menu to change the List View.
- **Pin Lists**: Click the pin icon to mark your frequently used list as a “pinned list.”
- **Search bar**: Search for keywords (dates are not searchable).
- **Sortable columns**: Switch the order in which the data appears.

Department of Children & Youth

Home Browse Grants My Applications My Awards More ▾

Individual Applications
All Individual Applications ▾ ↗

1 item • Sorted by Application ID • Filtered by All individual applications • Updated 2 minutes ago

Search this list...

	Application ID ↑ ▾	Grant ▾	Subgrantee ▾	Created Date ▾	Submitted D... ▾	Applicatio... ▾	Programmat... ▾	
1	IA-0000000774	Smart Cities Grant	Test 3	8/4/2025, 2:15 PM	8/4/2025	Draft	Divya Peri	▾

DCY GMS PORTAL ACCESS AND NAVIGATION:

“MY AWARDS” TAB

MY AWARDS

The below screenshot provides a visual of the My Awards tab of the DCY GMS Portal.

My Awards Tab:

This section displays all awards your agency/organization currently holds or has received in the past.

The key column headers providing important information on this page are:

- **Agreement Number:** The unique identifier assigned to each agreement.
- **Grant:** The specific grant associated with the award.
- **Status:** The current stage or progress of the agreement.
- **Subgrantee:** Your agency/organization's name.
- **Contracts Team Member:** The DCY team member responsible for contract management.
- **Agreement Manager:** Your primary point of contact for all matters related to your award.

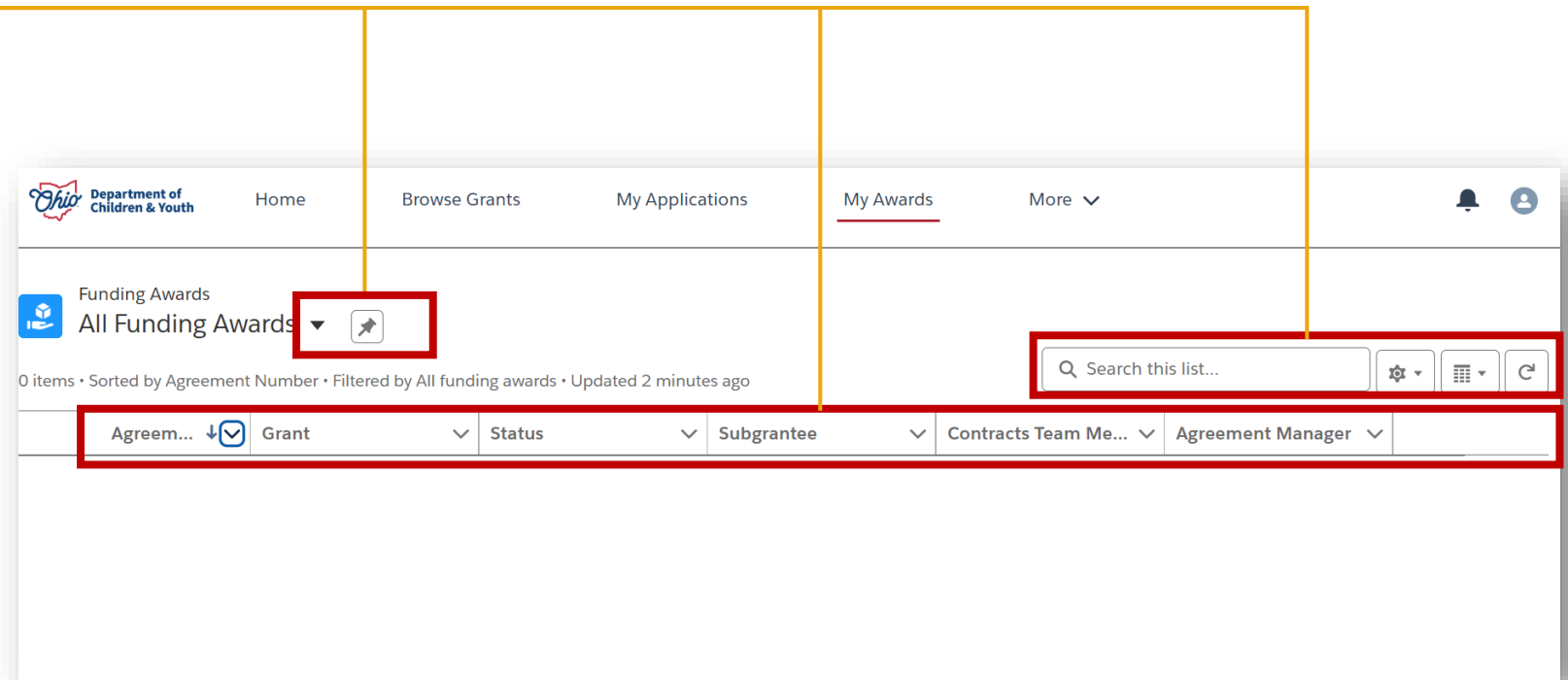
The screenshot shows the DCY GMS Portal interface. The navigation bar includes the Ohio Department of Children & Youth logo, and links for Home, Browse Grants, My Applications, My Awards (highlighted with a red box), and More. Below the navigation bar, the 'Funding Awards' section is active, showing 'All Funding Awards' with a search icon. A search bar contains the text 'Search this list...'. Below the search bar, the table headers are: Agreement Number (with a dropdown arrow), Grant (with a dropdown arrow), Status (with a dropdown arrow), Subgrantee (with a dropdown arrow), Contracts Team Member (with a dropdown arrow), and Agreement Manager (with a dropdown arrow). The table body is empty, displaying '0 items • Sorted by Agreement Number • Filtered by All funding awards • Updated 2 minutes ago'.

MY AWARDS

The below screenshot provides a visual of the My Awards tab of the DCY GMS Portal.

My Awards Tab Features: All of the features of this page are consistent with those on the “Browse Grants” page. This includes features like:

- **Alternative List Views:** Click on the dropdown menu to change the List View.
- **Pin Lists:** Click the pin icon to mark your frequently used list as a “pinned list.”
- **Search bar:** Search for keywords (dates are not searchable).
- **Sortable columns:** Switch the order in which the data appears.



DCY GMS PORTAL ACCESS AND NAVIGATION:

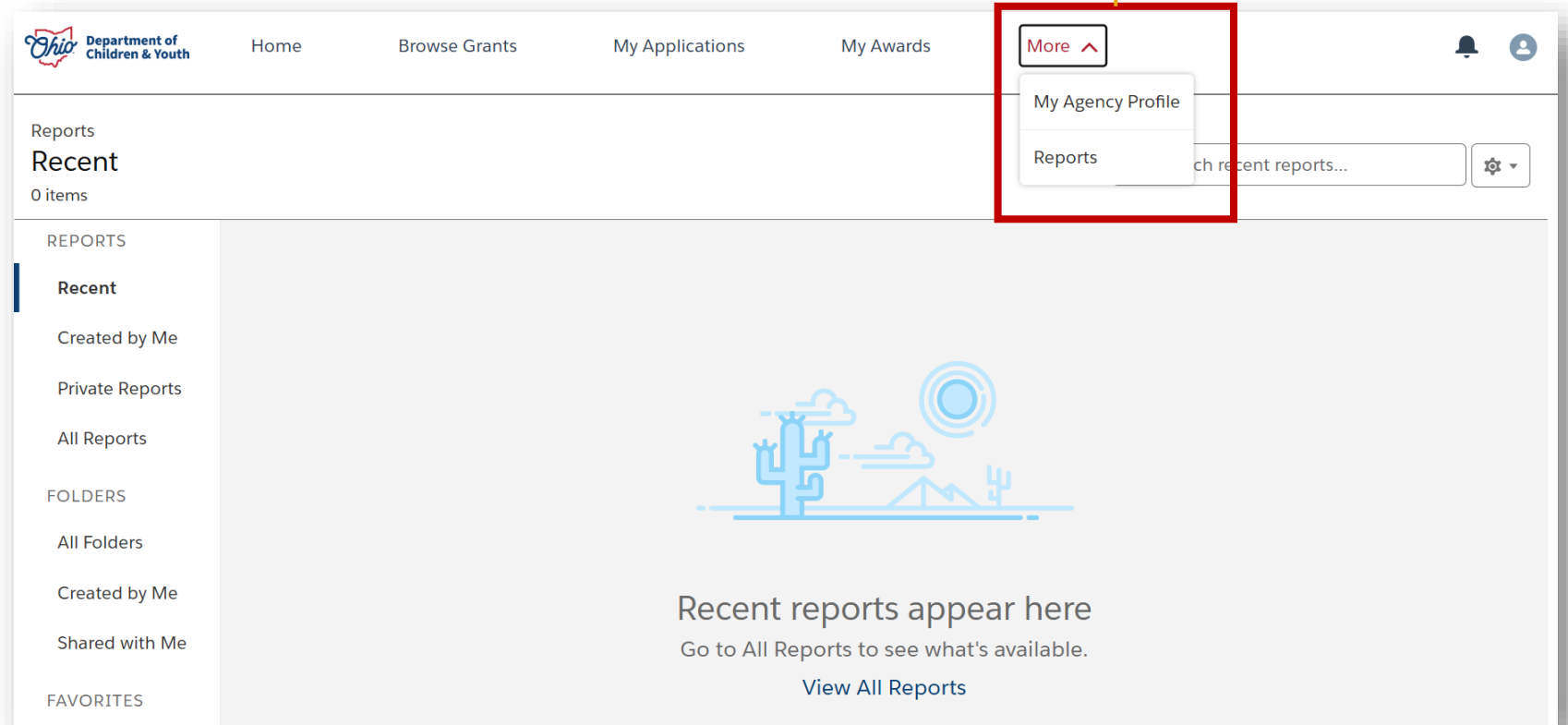
“MORE” TAB

MORE

The below screenshot provides a visual of the Homepage of the DCY GMS Portal.

More Tab: This includes the following options:

- **My Agency Profile:** Contains all organization details entered during your agency/organization's initial account setup.
- **Reports:** Provides access to run and export specific reports as needed.



ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

Adding Users Overview: This step is important to ensure that everyone who applies for or manages grants in your agency/organization can access the GMS Portal through your agency/organization's account.

To begin adding users to the account, first navigate to the **"Agency Contacts"** Section within the **Account Profile**.

The screenshot shows the DCY GMS Portal interface. At the top, there is a navigation bar with the Department of Children & Youth logo, a home button, and links for Browse Grants, My Applications, My Awards, and a More dropdown menu. Below the navigation bar, the account profile for 'Account Test 3' is displayed. The profile includes fields for Status (Approved), Organization Type (Hospitals), and Office Phone Number ((158) 989-8745). There is an 'Edit' button in the top right corner. Below the profile information, there are tabs for Agency Details, Agency Contacts (highlighted with a red box), Pending Agency Forms, Agency Forms, and Files. The Agency Contacts tab is active, showing a 'Contacts (1)' section with a 'New' button. Below this is a table with columns for Contact Name, User Role, Organization Position Title, and Email. The table contains one entry: Divya Peri, Primary User, Director, and divya.periakaruppan@childrenandyouth... There is a 'View All' link at the bottom right of the table.

DCY GMS Portal Tips and Tricks

Only Primary Users have the ability to add additional users.

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

The screenshot displays the 'Agency Contacts' section of the DCY GMS Portal. At the top, there are navigation tabs: 'Agency Details', 'Agency Contacts' (selected), 'Pending Agency Forms', 'Agency Forms', and 'Files'. Below the tabs is a table with one contact listed: Divya Peri, Primary User, Director, and email divya.periakaruppan@childrenandyouth... A 'New' button is highlighted with a red box in the top right corner of the table. A pop-up window titled 'New Contact: gmis' is open in the foreground, also outlined in red. The pop-up contains a form with the following fields: 'User Role' (dropdown menu, currently '--None--', with a red asterisk and 'Complete this field.' below it), 'Account Name' (text input, 'Test 3'), 'Name' (dropdown menu, currently '--None--', with a red asterisk), 'Role at Organization' (dropdown menu, currently '--None--', with a red asterisk), 'Salutation' (dropdown menu, currently '--None--'), 'First Name' (text input, 'First Name'), and 'Middle Name' (text input, 'Middle Name'). At the bottom of the pop-up are three buttons: 'Cancel', 'Save & New', and 'Save'. A legend indicates that a red asterisk (*) denotes 'Required Information'.

1. Adding Users: Click the “New” button that is on the right side of the table labeled “Contacts.”

This will open a pop-up window in which you will need to populate all of the fields.

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

2a. Adding Users: Select the "User's Role" from the dropdown menu. If you designate them as a secondary user, they will have limited access within the Portal.

New Contact: gmis

* = Required Information

Contact Information

* User Role

--None--

✓ --None--

Primary User

Secondary User

Account Name

Test 3

* Role at Organization

--None--

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

2b. Adding Users: Enter the user's **Name**. Only the First Name and Last Name fields are required.

*** Name**

Salutation
--None--

First Name
First Name

Middle Name
Middle Name

*** Last Name**
Last Name

Suffix
Suffix

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

2c. Adding Users: Enter the user's **Email, Phone Number, and Position Title.**

The screenshot shows a web form for adding users. It includes the following fields and options:

- * Email:** An empty text input field.
- * Phone:** A text input field containing the number "1234589895".
- Fax:** An empty text input field.
- * Organization Position Title:** An empty text input field.
- Agency Head:** A checkbox that is currently unchecked.
- Subrecipient Portal Access:** A checkbox that is currently unchecked, with an information icon (i) to its right.

A yellow L-shaped box highlights the Email and Phone input fields. A red rectangular box highlights the Organization Position Title input field.

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

* Organization Position Title

Agency Head

Subrecipient Portal Access ⓘ

Active at Organization ⓘ

OHID Account

Address 2

2d. Adding Users: Review and check each of the following boxes based on the user:

- **Agency Head:** Check this box if the user is the head of the agency/organization.
- **Subrecipient Portal Access:** Always check this box if you want the user to receive an email with portal access. (**Note:** You will need to uncheck this box if the user leaves the organization in order to remove their access).
- **Active at the Organization:** Check this box if the user is currently employed by the agency/organization. If a user leaves the agency/organization, return to this screen and uncheck this box. This field does not affect user access and is only used for tracking purposes.
- **OHID Account:** Enter the user's OHID Account Number. They will use their OHID to login to the DCY GMS Portal once they are added as a user.

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

Address Information

* Address 1	Address 2
<input type="text"/>	<input type="text"/>
* City	* State
<input type="text"/>	OH ▼
* Zip Code	
<input type="text"/>	

Cancel Save & New Save

2e. Adding Users: Input the user's work address, which may be the same as the Account Profile Address.

ADDING USERS

The below screenshot provides a visual of adding users to an agency/organization's account within the DCY GMS Portal.

Address Information

* Address 1

* City

* Zip Code

Address 2

* State
OH ▼

Cancel Save & New Save

3. Adding Users: Once all fields are completed and the appropriate boxes are checked, you can proceed to either click **“Save”** or click **“Save & New”** if you have more contacts to enter to immediately begin creating the next one.

When you click either variation of “save” the user you added should get an email that will prompt them to set up their user profile to access the DCY GMS Portal.

DCY Grants Management System (GMS) Portal Applying to Grants

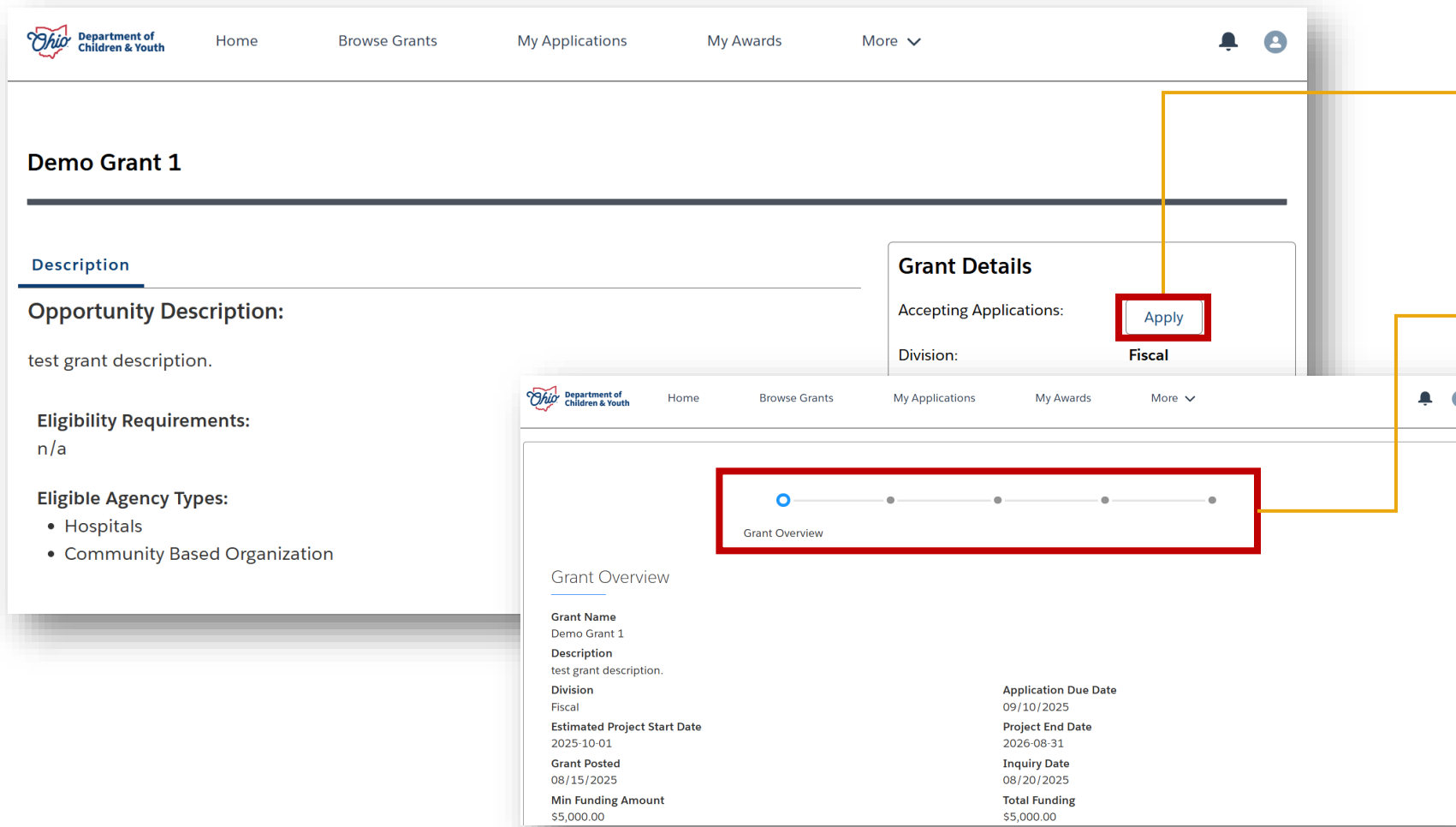
DCY GMS Portal Training Handout

APPLYING TO GRANTS IN DCY GMS PORTAL:

COMPLETING A GRANT APPLICATION

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.



1. Grant Application: Once you click “Apply,” a new window will open with your Grant Application.

At the top of the page, you’ll see a Status Bar that shows exactly where you are in the application process. You’ll move through the following sections of the application:

- Grant Overview
- Legal Terms
- Project Detail
- Budget
- Additional Documents

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

Department of Children & Youth

Home Browse Grants My Applications My Awards More

Grant Overview

Grant Overview

Grant Name Demo Grant 1	
Description test grant description.	
Division Fiscal	Application Due Date 09/10/2025
Estimated Project Start Date 2025-10-01	Project End Date 2026-08-31
Grant Posted 08/15/2025	Inquiry Date 08/20/2025
Min Funding Amount \$5,000.00	Total Funding \$5,000.00

Save & Next

2. Grant Overview: If you've already looked through these details and feel comfortable moving forward, you can simply click "Save and Next" to continue.

DCY GMS Portal Reminder

Whether you found the grant using the "Browse Grants" tab on the Portal or clicked a direct link from your Agreement Manager, the application process will look exactly the same from this point onward.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a progress bar at the top with five steps. The first step is completed (checked), and the second step is the current page, 'Legal Terms'. Below the progress bar, the title 'Legal Terms' is underlined. A section titled 'Disclosure' contains two paragraphs of text. The first paragraph states: 'You have no reasonable expectation of privacy regarding any communications or data transiting or stored on the application. At any time, and for any lawful purpose, the DCY may monitor, intercept, and search and seize any communication or data transiting or stored on this information system.' The second paragraph states: 'Data usage and ownership are controlled by the terms of the grant agreement and/or RFGA. Unless DCY agrees, the State owns all data created and paid for by this grant. DCY and State of Ohio policies of data usage, protection, and storage shall always control.' Below the text is a checkbox labeled '* I agree to the terms & conditions.' which is checked. At the bottom right, there are two buttons: 'Previous' and 'Save & Next'. The 'Save & Next' button is highlighted with a red box.

3. Legal Terms: Carefully read through all the legal terms. Be sure to scroll through the entire section to confirm that you've reviewed everything.

If you agree to the terms and conditions, select the checkbox next to **"I agree to the terms & conditions."**

Once this is complete, Select **'Save & Next'** to move forward in the application process.

DCY GMS Portal Tips and Tricks

After selecting 'Next' in the Legal Terms Section, your application status will change to "In Draft." This will trigger automatic notifications reminding users to complete the application.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows the 'Project Detail' form in the DCY GMS Portal. The form is titled 'Project Detail' and includes a progress indicator at the top. The form fields are as follows:

- Organization Name:** Test 3
- Project Description:** Xyz
- Total Request:** \$ 5,000.00
- Primary Target Population:** Xxx
- Expected Reach:** 500
- Programmatic Contact Person:** Divya Peri

At the bottom of the form, there are three buttons: 'Save for Later', 'Previous', and 'Save & Next'. The 'Save & Next' button is highlighted with a red box.

3. Project Detail: This is where Organizations enter the initial information for their application, including the following:

- **Project Description:** Provide a brief summary of your project.
- **Total Request:** Enter the total amount of funding needed for the project. This value should be within the funding limits listed in the grant details.
- **Primary Target Population & Expected Reach**
- **Programmatic Contact Person:** If the person you want to select does not appear in the dropdown menu, they have not yet been registered in your Agency Profile within the GMS Portal.

DCY GMS Portal Reminders

This section—and all the ones that follow—can be completed by any Grantee who has a user profile for the account. That includes both Primary and Secondary Users.

Once this is complete, Select '**Save & Next**' to move forward in the application process.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows the Ohio Department of Children & Youth grant application interface. At the top, there is a navigation bar with links for Home, Browse Grants, My Applications, My Awards, and More. A progress indicator shows four steps completed, with the fourth step, 'Budget', currently active. Below the progress bar, the 'Budget' section is highlighted with a red border. It features a 'Budget' icon and a series of tabs: Summary, Personnel, Other Direct Costs, Equipment, Contracts, Travel, Supplies, and Indirect Cost. The 'Summary' tab is selected. Below the tabs is a table with the following data:

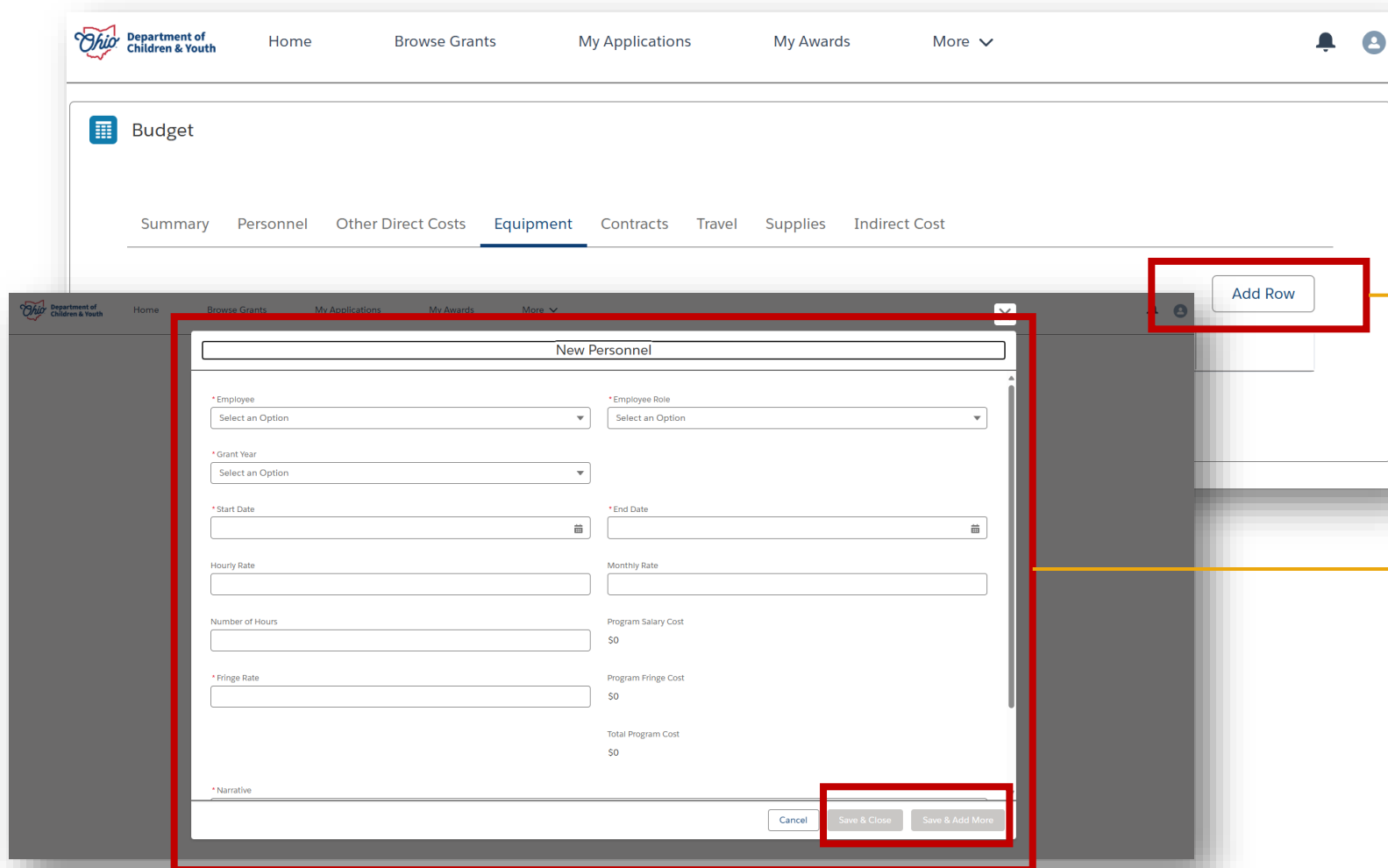
Category	2026 Budgeted Amount	2027 Budgeted Amount	Budget Total
Personnel	\$0	\$0	\$0
Other Direct Costs	\$0	\$0	\$0

4a. Budget Overview: When you first enter this section, you'll see a row of tabs displayed across the top of the page. Each tab represents a different part of your budget, including:

- **Summary**
- **Personnel**
- **Other Direct Costs**
- **Equipment**
- **Contracts**
- **Travel**
- **Supplies**
- **Indirect Costs**

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.



4b: Adding a Row to a Budget Category: Once you select a tab— like Personnel, Other Direct Costs, Equipment, Contracts, Travel, Supplies, or Indirect Costs—you’ll see an **“Add Row”** button appear.

Once you **click “Add Row”** in any budget tab, a pop-up window will appear.

This window contains several required fields that you’ll need to fill out. The exact fields you see will depend on which tab you’re working in—so each section may look a little different.

Once you **click “Save & Close”** or **“Save & Add Row,”** you’ll see them listed in a table format within that section of the budget.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a 'New Personnel' form with the following fields and values:

- Employee:** Select an Option
- Employee Role:** Select an Option
- Grant Year:** Select an Option
- Start Date:** [Calendar icon]
- End Date:** [Calendar icon]
- Hourly Rate:** [Text input]
- Monthly Rate:** [Text input]
- Number of Hours:** [Text input]
- Program Salary Cost:** \$0
- Program Fringe Cost:** \$0
- Total Program Cost:** \$0
- Fringe Rate:** [Text input]
- Narrative:** [Text area]

Buttons at the bottom: Cancel, Save & Close, Save & Add More.

4c: Adding a Personnel Budget Item: After clicking “Add Row” in the Personnel section, a pop-up window will appear with several fields to complete:

- **Employee:** If the person you’re looking for isn’t listed, that means they haven’t been added as a user in the Agency Profile within the GMS portal.
- **Employee Role:** Choose the employee’s role from the drop-down menu. If you select “Other,” an additional field labeled “**Other Title**” will appear. Enter the specific title for the employee in this field.
- **Grant Year:** Select the appropriate grant year from the dropdown.
- **Start Date and End Date:** Enter the dates that define the employee’s period of work on the grant.
- **Hourly Rate:** Enter the hourly rate for the employee. If you choose to enter a monthly rate instead, this field will be locked.
- **Number of Hours:** Enter the total number of hours the employee will work. This field will be locked if you’ve entered a monthly rate.
- **Monthly Rate:** If you prefer to enter a monthly rate, the hourly rate and number of hours fields will be locked.
- **Fringe Rate:** Enter the fringe rate as a percentage.
- **Narrative:** Provide a short description of the employee’s duties.

As you fill out these fields, you’ll notice that **the Program Salary Cost, Fringe Cost, and Program Cost** fields will automatically populate.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a web application window titled "New Other Direct Cost" with a close button (X) in the top right corner. The window has a navigation bar at the top with tabs: Summary, Personnel, Other Direct Costs (selected), Equipment, Contracts, Travel, Supplies, Indirect Cost, and Match. The main form area contains the following fields:

- Description:** A text input field with a red asterisk indicating it is required.
- Amount:** A text input field with a red asterisk indicating it is required.
- Grant Year:** A dropdown menu with the text "Select an Option" and a downward arrow.
- Narrative:** A large text area for entering a detailed description.

At the bottom of the form, there are three buttons: "Cancel", "Save & Close", and "Save & Add More".

4d. Adding an Other Direct Costs Budget Item: This section is where you'll enter any additional project expenses that don't fit into the other budget categories. When you click "Add Row" in this tab, you will need to populate the following fields:

- **Description:** Start by entering the name of the direct cost you're adding. This should be a brief, clear label—such as "Printing Services" or "Software License."
- **Amount:** Enter the cost amount, rounding to the nearest whole dollar.
- **Grant Year:** Select the appropriate grant year from the dropdown menu. The options will match the duration of your grant's award period.
- **Narrative:** Use this field to briefly explain how the cost supports your project. Unlike the Description, which just names the item, the Narrative should describe its purpose and how it helps meet your grant goals.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a 'New Equipment' pop-up window. At the top, there is a title bar with 'New Equipment' and a close button. Below the title bar, there are four input fields: 'Description' (a text box), 'Grant Year' (a dropdown menu with 'Select an Option' selected), 'Quantity' (a text box), and 'Unit Price' (a text box). Below these fields, there is an 'Amount' field with '50' entered. At the bottom of the form is a large 'Narrative' text area. At the bottom right of the window are three buttons: 'Cancel', 'Save & Close', and 'Save & Add Row'.

4e. Adding an Equipment Budget Item:

After clicking “Add Row” in the Equipment tab, a pop-up window will appear with several fields:

- **Description:** Enter the name of the equipment you’re adding. Keep this label brief and clear, such as “Laptop Computer” or “3D Printer.”
- **Grant Year:** Choose the correct grant year from the dropdown.
- **Quantity:** Enter the number of units you plan to purchase.
- **Unit Price:** Enter the cost per unit for the equipment.
- **Narrative:** Provide a brief description explaining how this equipment will be used for the project.

As you fill in the **Quantity** and **Unit Price**, the **Amount** field will automatically calculate the total for you.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a web form titled "New Contract" with a close button (X) in the top right corner. The form contains the following fields:

- Contractor Type:** A dropdown menu with "Select an Option" as the placeholder.
- Contractor:** A text input field.
- EIN:** A text input field.
- Grant Year:** A dropdown menu with "Select an Option" as the placeholder.
- Amount:** A text input field.
- Narrative:** A large text area for entering a description.

At the bottom of the form, there are three buttons: "Cancel", "Save & Close", and "Save & Add More".

4f. Adding a Contracts Budget Item:

When adding a Contracts budget item, you will need to populate the following fields.

- **Contractor Type:** Select the contractor type from the dropdown menu.
- **Contractor Name:** Enter the full name of the contractor organization or individual.
- **EIN Number:** Enter the contractor's Employer Identification Number (EIN).
- **Grant Year:** Choose the appropriate grant year from the dropdown.
- **Amount:** Enter the total contract amount for the selected grant year.
- **Narrative:** Provide a brief description of the contract's purpose and how the contractor's services will support the project.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a web application interface for adding a travel budget item. The main window is titled "New Travel" and is part of a "Budget" application. The interface includes a navigation bar with tabs for Summary, Personnel, Other Direct Costs, Equipment, Contracts, Travel, Supplies, Indirect Cost, and Match. The "Travel" tab is selected. The form contains the following fields:

- Description:** A text input field.
- Grant Year:** A dropdown menu with the text "Select an Option".
- Amount:** A text input field.
- Narrative:** A large text area for providing a short explanation.

At the bottom of the form, there are three buttons: "Cancel", "Save & Close", and "Save & Add More".

4g. Adding a Travel Budget Item: When adding a Travel budget item, you will need to populate the following fields.

- **Description:** Enter a brief, clear description of the travel expense—such as “Conference Attendance” or “Site Visit Travel.”
- **Grant Year:** Select the appropriate grant year from the dropdown menu. The options will reflect the duration of your grant award.
- **Amount:** Enter the total dollar amount for the travel expense.
- **Narrative:** Provide a short explanation of how this travel supports your project.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a web application interface with a navigation bar at the top containing the following tabs: Summary, Personnel, Other Direct Costs, Equipment, Contracts, Travel, Supplies, Indirect Cost, and Match. A red box highlights the 'New Supplies' form, which is a modal window with a title bar and a close button (X). The form contains the following fields:

- Description:** A text input field.
- Grant Year:** A dropdown menu with the text "Select an Option".
- Amount:** A text input field.
- Narrative:** A large text area for a detailed explanation.

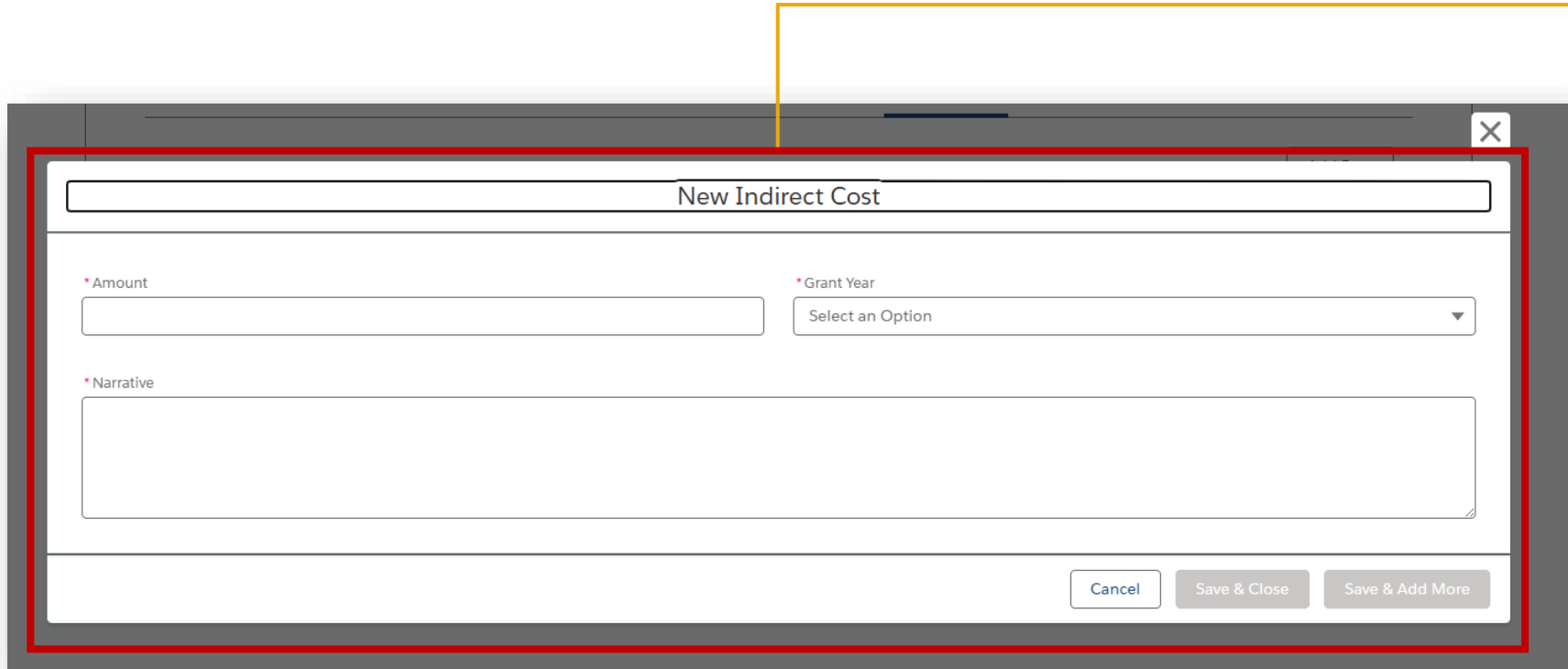
At the bottom of the form, there are three buttons: "Cancel", "Save & Close", and "Save & Add More".

4h. Adding a Supplies Budget Item: This is where you'll enter expenses for supply items by filling out the following fields:

- **Description:** Enter a brief, clear description of the supply item or category—such as “Office Supplies.”
- **Grant Year:** Select the appropriate grant year from the dropdown menu.
- **Amount:** Enter the total dollar amount for the supplies expense.
- **Narrative:** Provide a short explanation of how these supplies will be used to support your project.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

A screenshot of a web application window titled "New Indirect Cost". The window has a close button (X) in the top right corner. The form contains three main input fields: a text box for "Amount", a dropdown menu for "Grant Year" with the text "Select an Option", and a large text area for "Narrative". At the bottom of the form, there are three buttons: "Cancel", "Save & Close", and "Save & Add More". A red rectangular box highlights the entire form area, and a yellow L-shaped line connects the top of this box to the text on the right side of the slide.

4i. Adding an Indirect Costs Budget

Item: When adding an Indirect Costs budget item, you will need to populate the following fields.

- **Amount:** Enter the total dollar amount for the indirect cost.
- **Grant Year:** Select the appropriate grant year from the dropdown menu. The available options will reflect the duration of your grant award.
- **Narrative:** Provide a brief explanation describing what the indirect cost covers and how it supports the overall project.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

The screenshot shows a web interface for a grant application budget. At the top left, the word "Budget" is displayed. Below it is a "Budget" icon and label. A horizontal navigation bar contains several tabs: "Summary", "Personnel", "Other Direct Costs", "Equipment", "Contracts", "Travel", "Supplies", "Indirect Cost", and "Match". The "Match" tab is currently selected. Below the navigation bar, a red-bordered box highlights a section titled "Total Match for Grant: \$7,500". Underneath this title is a table with two columns: "Match Description" and "Amount". The table contains two rows: "1 Cash" and "2 In-Kind".

4j. Adding Match Values to a Budget:

When the Match section is included, you'll be able to enter two types of contributions:

- **Cash Match:** These are direct financial contributions.
- **In-Kind Match :** These are non-cash contributions, like donated services, equipment, or volunteer time.

Next to **"Total Match for Grant,"** you'll see a number that's automatically calculated. This number reflects the required match amount, based on the match percentage and your total requested grant amount.

DCY GMS Portal Reminders

Match, or cost sharing, is required when a federal grant specifies that your agency/organization must cover a certain percentage of the total project cost using non-grant funds. This requirement is set by the funding agency to show your agency/organization's financial commitment to the project.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

4k: Overview of Budget Summary Tab: Once you finish adding all your budget items, navigate to the “Summary” tab. This tab gives you an auto-generated overview based on everything you entered in the previous sections:

Category	2026 Budgeted Amount	2027 Budgeted Amount	Budget Total
Personnel	\$275	\$0	\$275
Other Direct Costs	\$3,000	\$0	\$3,000
Equipment	\$0	\$0	\$0
Contracts	\$30,000	\$0	\$30,000
Travel	\$30,000	\$0	\$30,000
Supplies	\$11,725	\$0	\$11,725
Indirect Cost	\$0	\$0	\$0
Total Amount	\$75,000	\$0	\$75,000

Forecasting Per Quarter					
SFY2026	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Total SFY
Amount	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>
SFY2027	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter	Total SFY
Amount	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>	<input type="text" value="\$0"/>

Budgeted Amounts by Category and Fiscal Year: For every budget category (like Equipment, Supplies, Indirect Costs, etc.), you’ll see the amount allocated for each fiscal year of the grant.

Forecasting per Quarter: There’s also an optional section where subgrantees can enter Forecasted Amounts Per Quarter. This isn’t required, but it can be helpful for planning and reporting.

The Budget Total for Each Category Across All Fiscal Years: Each category will also show a combined total across the entire grant period

The Total Amount for Each Fiscal Year and the Combined Grand Total: The total budget for each fiscal year, plus the grand total for the entire grant period.

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.

Additional Documents

Required Files:
n/a

Enter File Title

Upload File

Upload Files Or drop files

File Name	File Type	Size (Bytes)	Created Date	Download	Delete
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I do not have any additional files ⓘ

Save for Later

Save

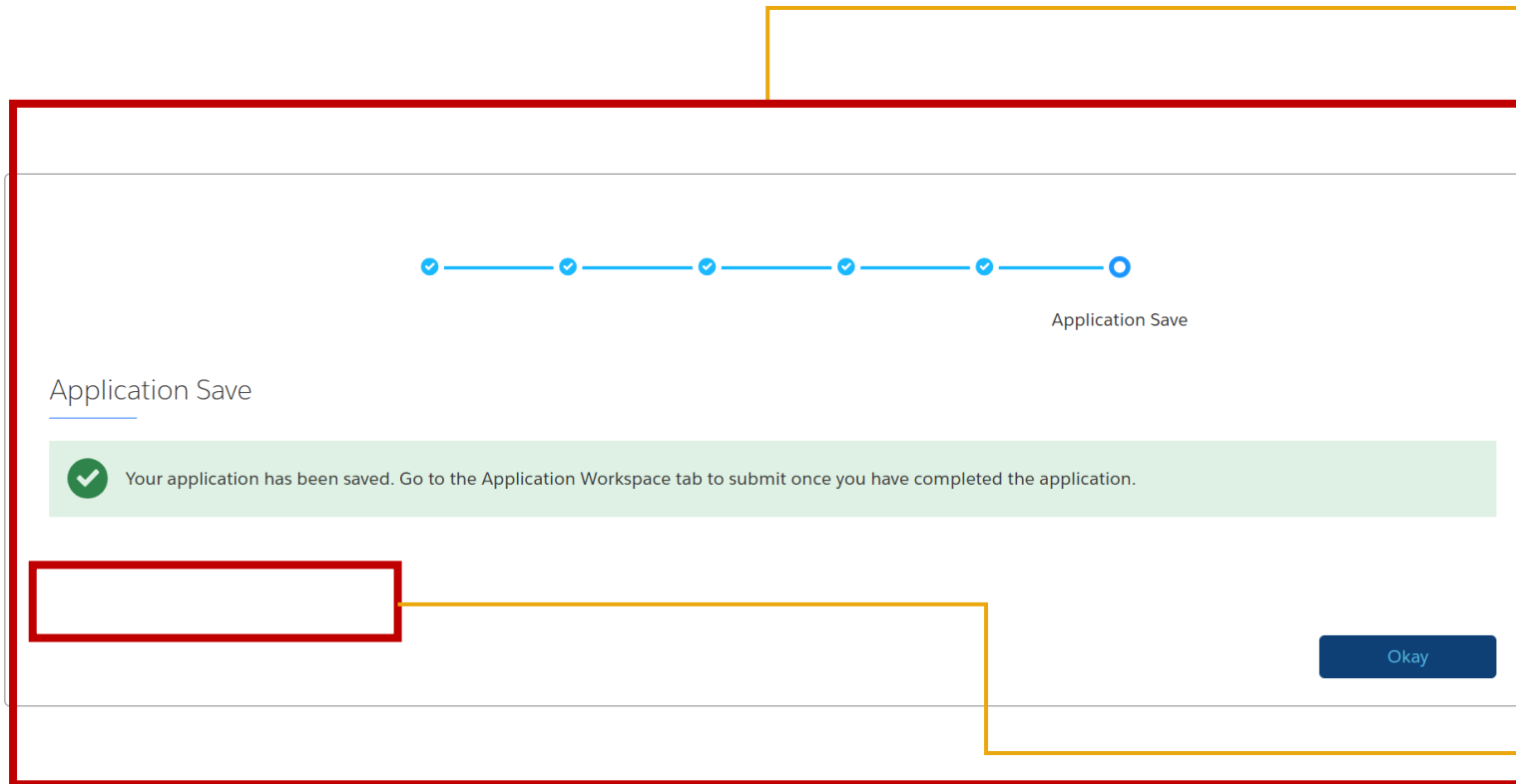
5. Additional Documents: Any documents that should be uploaded at this stage will be listed next to **“Required Files.”** Here’s how to upload your files:

- **Enter the File Title:** Type in a descriptive title for your file so reviewers know what it is.
- **Upload the File** Click the ‘Upload Files’ button to browse and select a saved file from your computer or drag and drop the file directly into the upload box.
- **Save:** After uploading, select ‘Save’ to confirm the file is attached to your application.

Once you upload all necessary files, select the checkbox labeled **“I do not have any additional files.”**

COMPLETING A GRANT APPLICATION

The below screenshot provides a visual for completing a grant application.



6. Application Save: Once you have completed all required sections and fields, the system will display a notification confirming that your application has been saved.

Click **“Okay”** to acknowledge the message and proceed.

REMINDERS

- Mid-Year Report
 - POSC3 Reminder
- Expense Reports

COMING SOON

- Allocation Table
- Amendments

EI OFFICE HOUR-

- EI Exchange
- EI Essentials
- Engaging EI
- EI Breakfast Club
- Stop by EI

