Grant Lifecycle User Manual



March 2025





Department of Education & Workforce

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Grant Lifecyle User Manual

The Grant Life Cycle (GLC) is used to track all grant applications submitted by the Department of Education and Workforce (DEW) to external organizations. For grants awarded to DEW, the GLC also helps to manage the use of funds.

Prior to applying for an award, Supervisor approval is required. Once the application is submitted, it must be entered into the GLC.

Accessing the GLC

To access the GLC, login to OH|ID and select the Grants Lifecycle tile. If outside of the Department, do not forget to connect to the VPN. User level of access will vary based on the roles assigned to your unique ID. See Table 1 for more information regarding roles.

ROLES

Table 1. Grant Lifecycle Roles

Role Name	Description	Level of Access
Grant Control Program Editor	Office specific role that allows for a user to search, create, edit, revise, and submit award applications and Award Control Sheets.	Edit
Grant Control Administrator	Highest level of access for the GLC and is assigned to those in Grants Management. This allows the user to search, create, edit, revise, approve, and delete award applications and Award Control Sheets.	Edit
Grant Control Fiscal Approver	Role that is only assigned to those in the Budget and School Funding Office. This allows a user to search, view, and approve award applications and Award Control Sheets.	View
Grant Control Viewer	Allows a user to search and view award applications and Award Control Sheets.	View

AWARD SEARCH

After signing into the GLC, the first screen will be the Award Search. This allows you to use different criteria to search for a specific award or narrow down results. The table will automatically populate with information from the current state fiscal year. To view or start a revision to an award set up in the GLC, click on the award name that is shown in blue. To set up an award, review the details below.

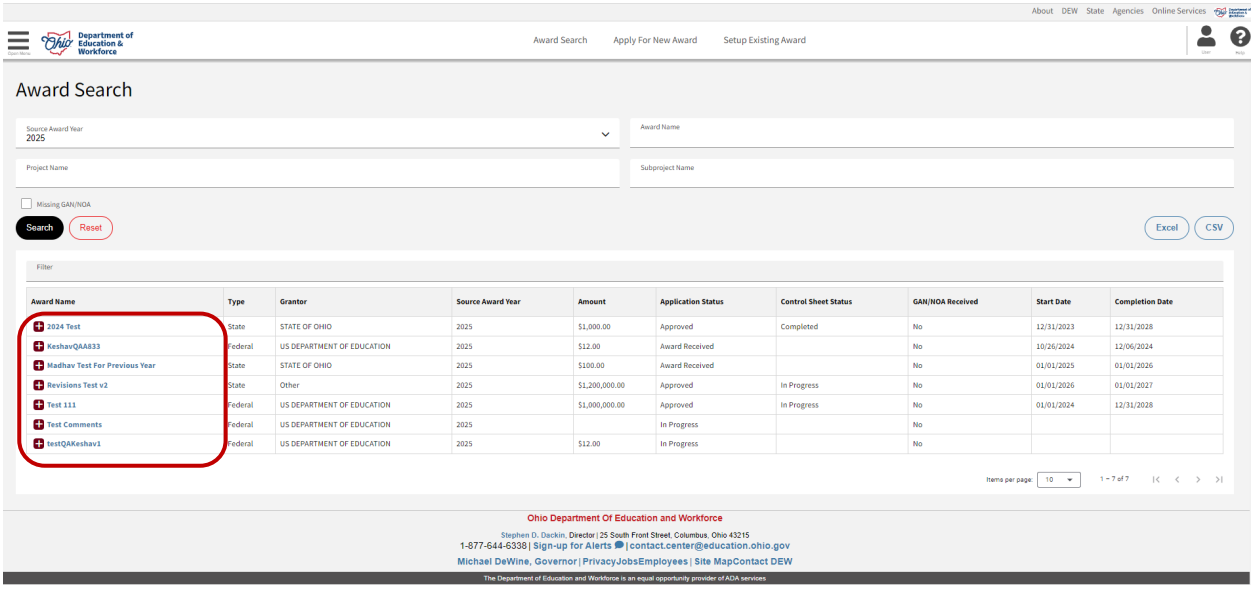


Figure 1. Grant Lifecycle Award Search

Entering An Award Application

When the Department applies for an award from an external organization, the information should be entered into the GLC to begin the tracking process. This should be done at the time the application is submitted. You will return to the system later to indicate whether the award was received or not received. If the award is not received, you will select that workflow on the Award Application page and no further action is necessary. If the award is received, the Award Application will continue through the approval process and the Award Control Sheet created.

The first step to set up an award in the GLC is to complete an Award Application. This process is started by selecting “Apply For New Award” or “Setup Existing Award” from the top of the Award Search page.

Note: *Grants should be entered in the award year related to the award type. A Federal Fiscal Year 2025 grant should be set up under 2025 whereas a State grant could be set up under 2025 or 2026 depending on where we are in the fiscal year and when the grant begins.*

APPLY FOR A NEW AWARD

This option should be selected if the Ohio Department of Education and Workforce is applying for a new award not previously received ***OR*** when a previously received award has new unique identifying information (FUND, ALN etc.). "Apply For New Award" is also used to enter a new award that has been received by DEW without having to submit an application to the grantor. This could be program funding received because of state legislation or from another funding source.

Note: *As part of this process, it is critical leadership is aware that the Department has applied for a new award and has approved the award application. This is indicated through the checkboxes on the bottom of the screen and the supervisor's name.*

Set up a new award by selecting "Apply For A New Award" from the top of the Award Search page. Once all required fields are filled out, hit the "create" button in the bottom right corner of the screen. This will generate the Award Application page.

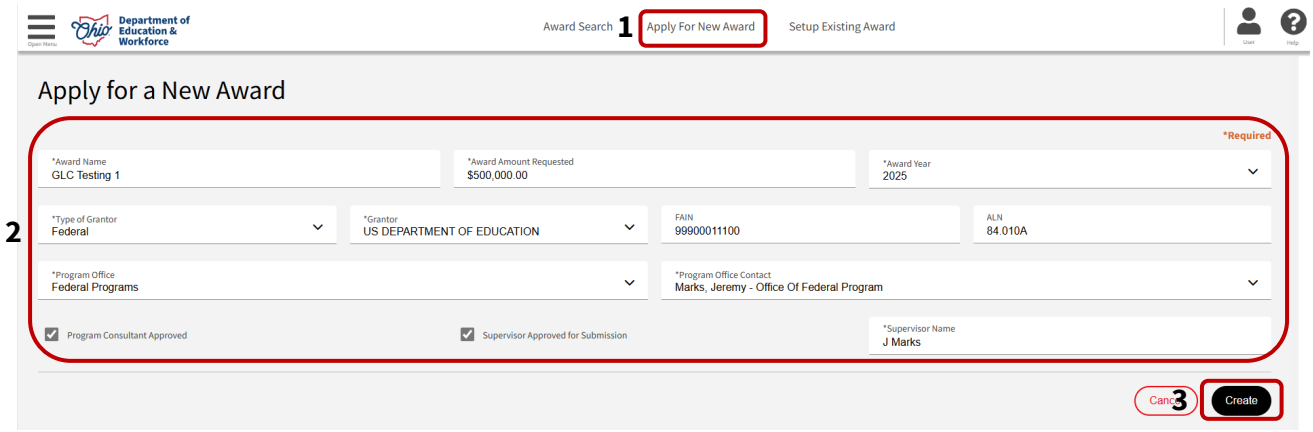


Figure 2. Apply for A New Award

AWARD APPLICATION

The Award Application contains important information regarding the money that the Department has received in a given award year. This is the first step in the process that must be approved before the Award Control Sheet is created. To see the full workflow for the award application, see Appendix B.

To submit the Award Application all fields denoted with an asterisk must be completed. If the award is submitted without all required information, the system will generate an error message indicated in a red banner.

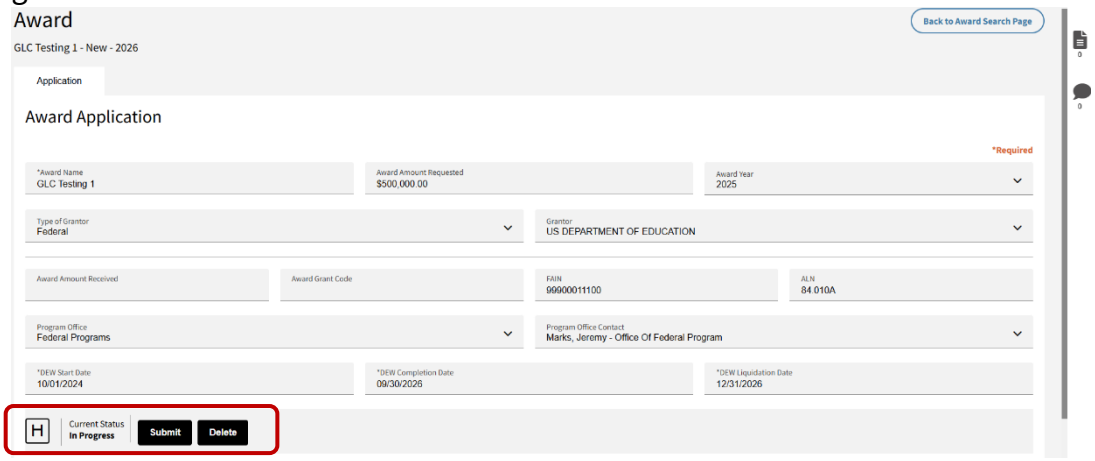


Figure 3. Award Application

An Award Application will sit in the workflow state of 'Submitted Pending Award' status until the Department has either received or not received the award. At which time, the Award Application workflow status should be updated accordingly.

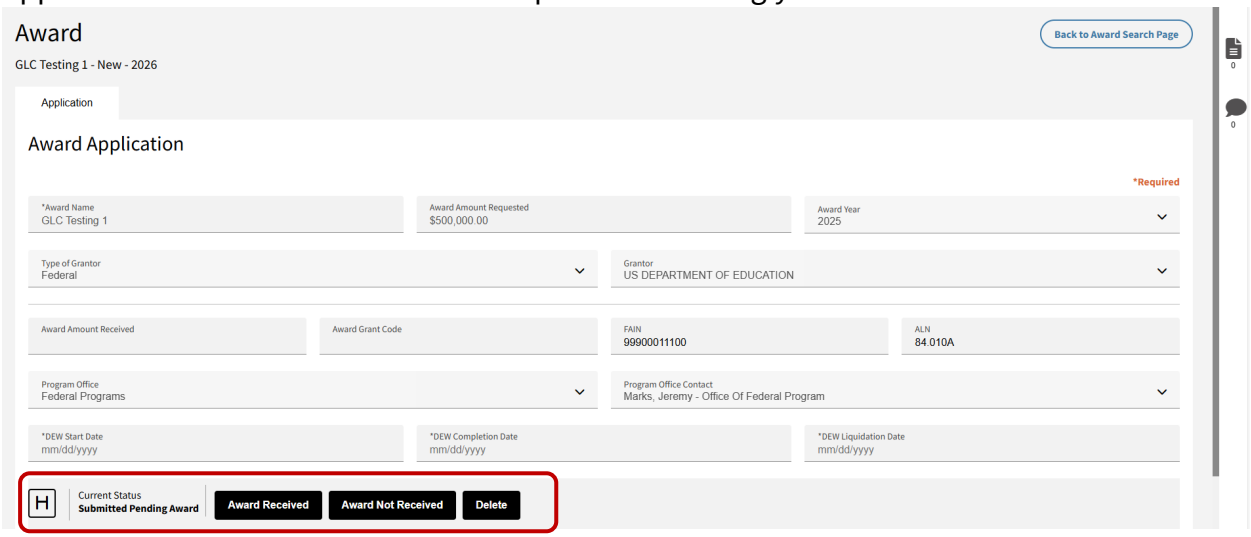


Figure 4. Changing Award Application Status

Award Not Received: Do not enter any data for the Award Amount Received. Select 'Award Not Received'. Nothing additional is required.

Award Received: Verify that the information within the Award Application is complete, accurate, and matches the Notice of Award (NOA) or Grant Award Notification (GAN). Select 'Award Received' to move the Award Application through the approval process. Once the Award Application has been approved by the Grant Administrator, the next step is to set up the Grant Control Sheet.

SETUP EXISTING AWARD

If the Department has previously received an award, the Award Application and Award Control Sheets can be populated using the "Setup Existing Award" menu option. This option should be used if it is a reoccurring award the Department receives annually ***OR*** if DEW has received the award in the past and the unique identifying information has NOT significantly changed with the new award.

Select the award year for the grant you want to set up in the current fiscal year. Once the appropriate award year is selected from the dropdown, the award application information will populate.

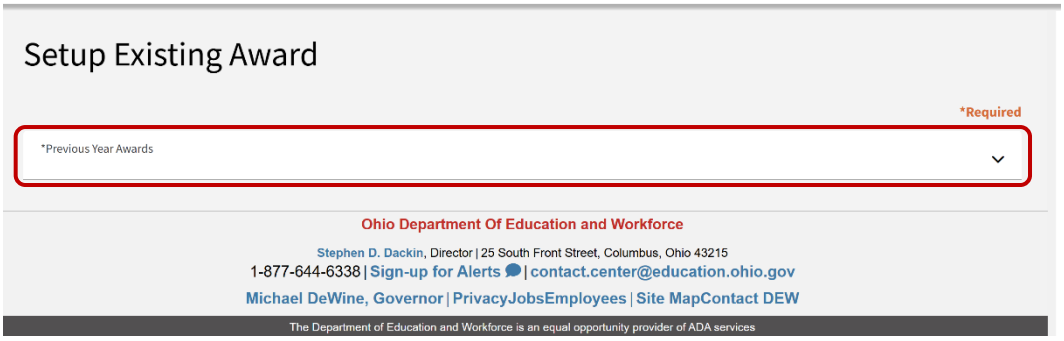


Figure 5. Setup Existing Award

Verify that all information is correct and then select the "Create" button in the bottom right to generate the Award Application. For more information on the Award Application process, please refer to that section.

Note: *The Award Name and Type of Grantor are not editable fields to ensure accuracy of data.*

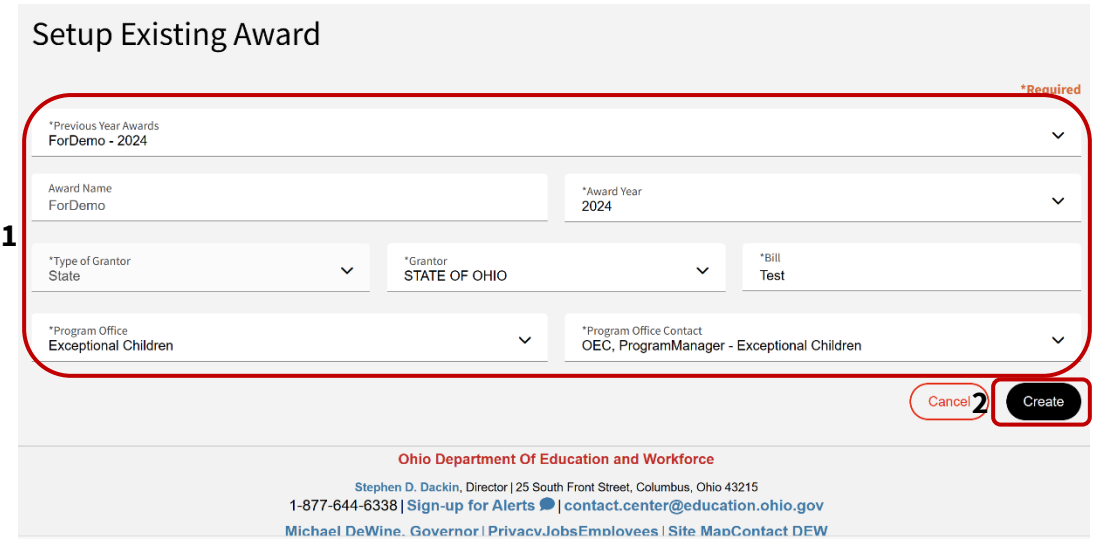


Figure 6. Verification and Creation of Setup Existing Award

CREATING AN AWARD CONTROL SHEET

Once the Award Application has been approved by Fiscal and Grants Administration, the Award Control Sheet will be generated. The Award Control Sheet can only be edited by someone assigned to the Program Office under which the Award Application was entered and who has the appropriate role. If another Program Office is managing a project or subproject within the grant, they will need to work with the appropriate staff to have the information entered into the Award Control Sheet.

The top section of the Award Control Sheet contains details regarding the award from the Award Application. Verify that all information is accurate and do not forget to check the GAN/NOA received checkbox to see if it has been received by the Department and uploaded against the award control sheet.

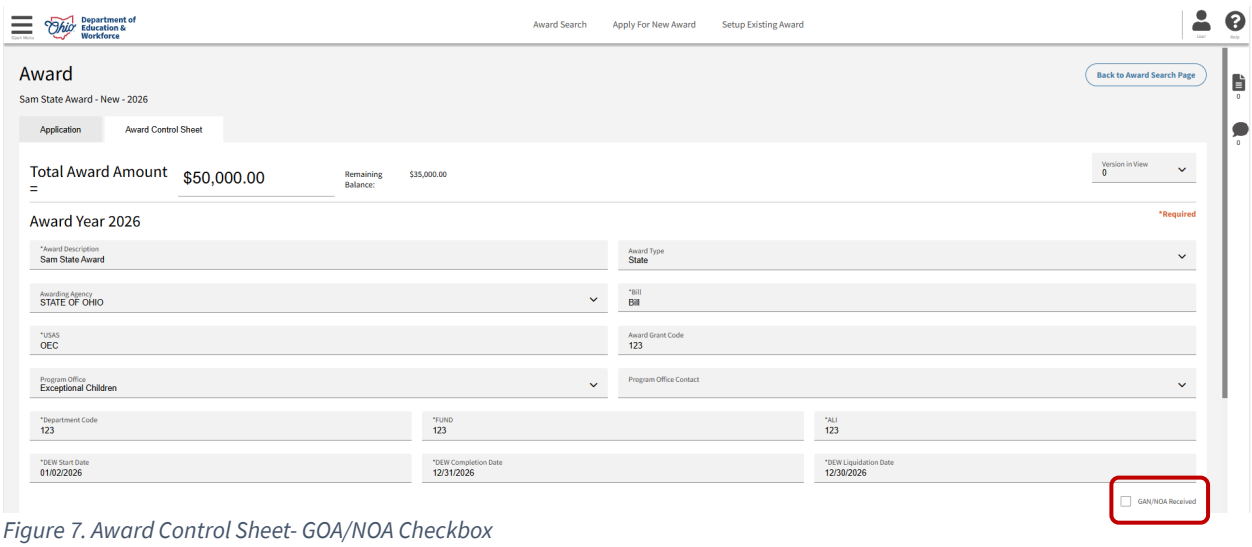


Figure 7. Award Control Sheet- GOA/NOA Checkbox

The bottom half of the Award Control Sheet is where projects and subprojects are added to the Award Control Sheet. To add a project, select the “Add Project” button in the middle right of the page. Complete all fields and click save.

Note: *The project start and completion dates must be within the start and completion dates of the award application.*

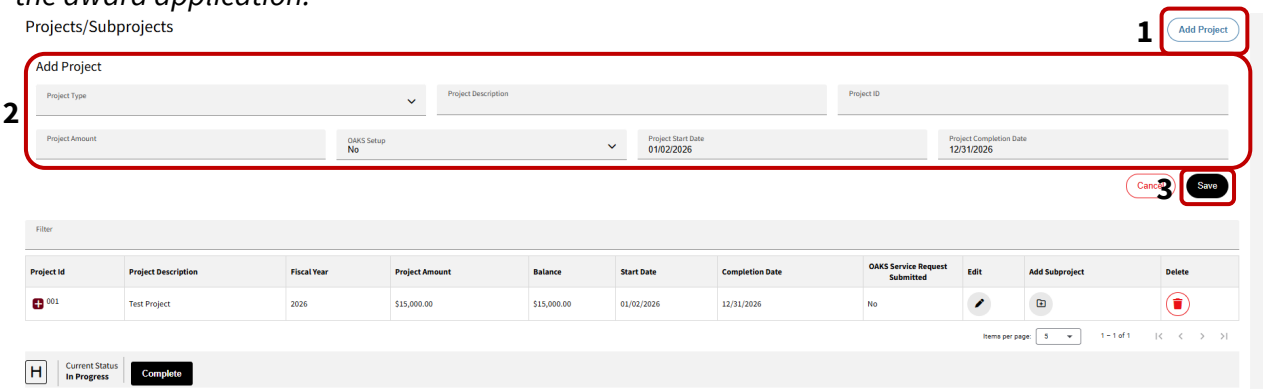


Figure 8. Adding a Project to Award Control Sheet

If a project is composed of multiple items, subprojects will need to be created under the project. To add a subproject, click on the file icon under the “Add Subproject” column. The subproject type has to match the project type and the dates must also be between the start and end date of the project. Once all fields are completed, click save.

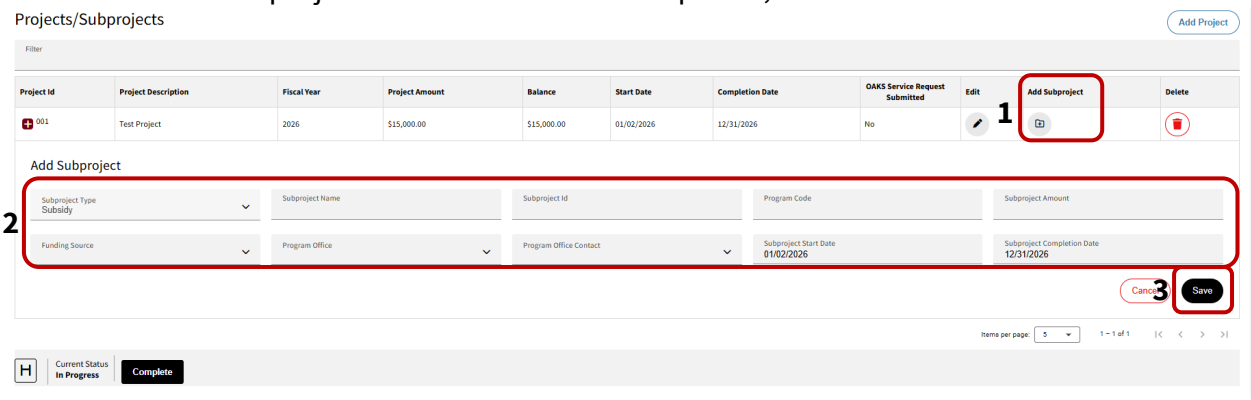


Figure 9. Adding a Subproject to Award Control Sheet

To submit the Award Control Sheet, the balance for each project that contains subprojects must be $0.00 and the Award Control Sheet total should have a balance of $0.00. Once all projects and subprojects have been added and the balance is $0.00, the Award Control Sheet can be submitted for approval. The full workflow for the Award Control Sheet can be found in Appendix C.

REVISING AN AWARD CONTROL SHEET

If changes need to be made to an approved Award Control Sheet, a revision must be created.

NOTE: *If the overall Award Amount has increased or decreased, a revised GAN/NOA that reflects the changes must be attached.*

Search for the applicable award using the award search. Click on the applicable Award Name.

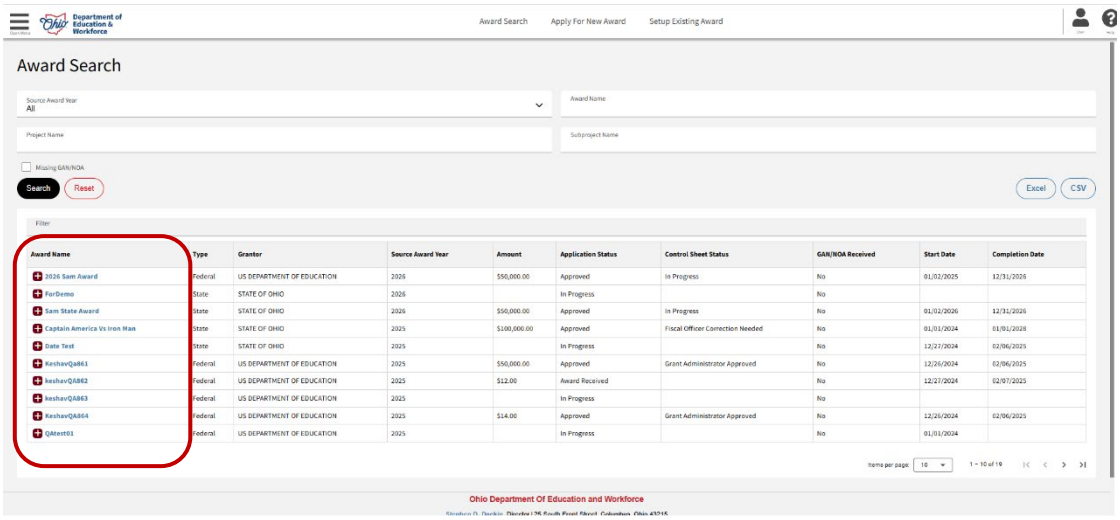


Figure 10.Figure 10. Selecting an Award to Create a Revision

Selecting the Award will open the previously approved Award Control Sheet. To open the Award Control Sheet for edits, select “Start New Revision” in upper section of the Award Control Sheet details.

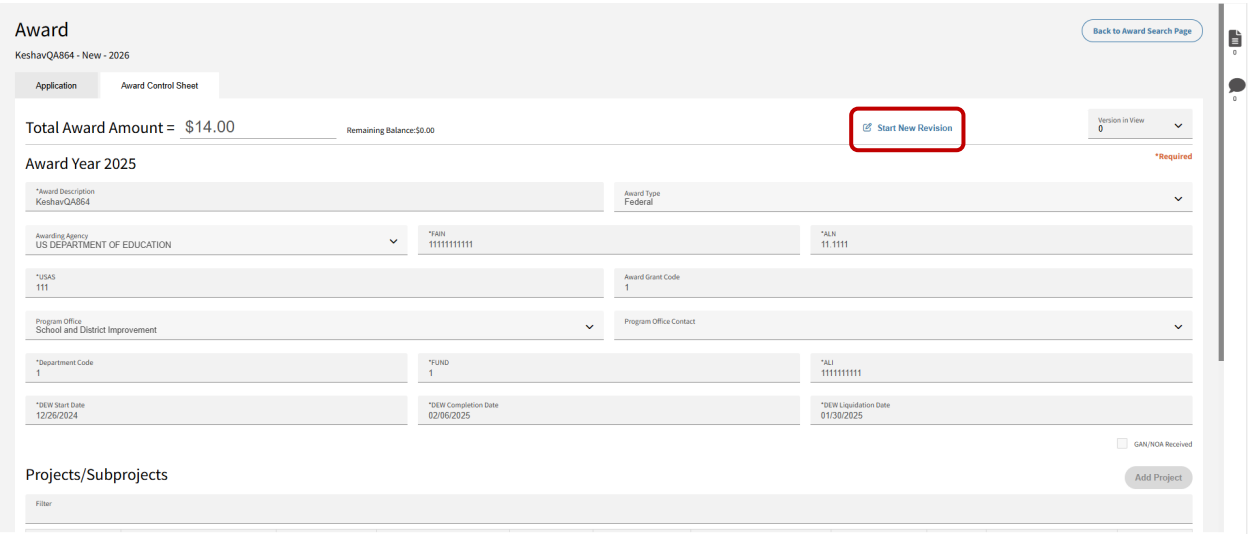


Figure 11. Starting a New Revision

Make any edits to the Award Control Sheet that are needed and ensure the balance remains $0.00. The Award Control Sheet must be submitted for approval again. Once approved, the revision number will increase by 1 as shown in the “Version in View” dropdown and the Change Log will populate to allow users to see what changes were made for an Award Control Sheet between various revisions.

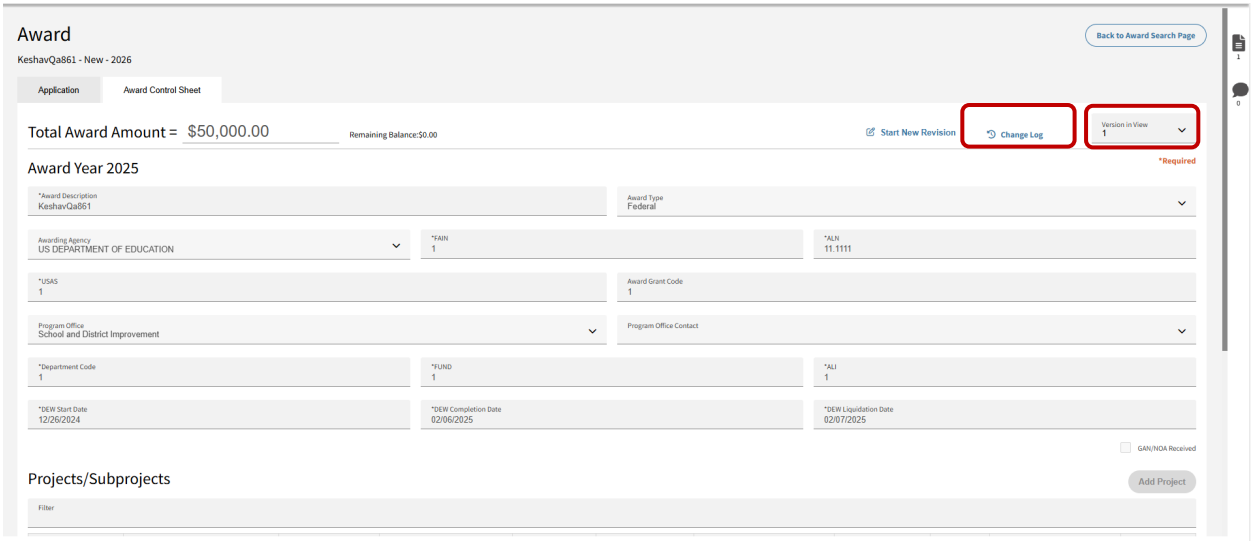


Figure 12. Revision has been Created and Change Log Populated

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Change Log

Any change that is made to an approved Award Control Sheet is captured within the Change Log. The Change Log can be accessed by clicking “Change Log” at the top of the page – upper right-hand corner.

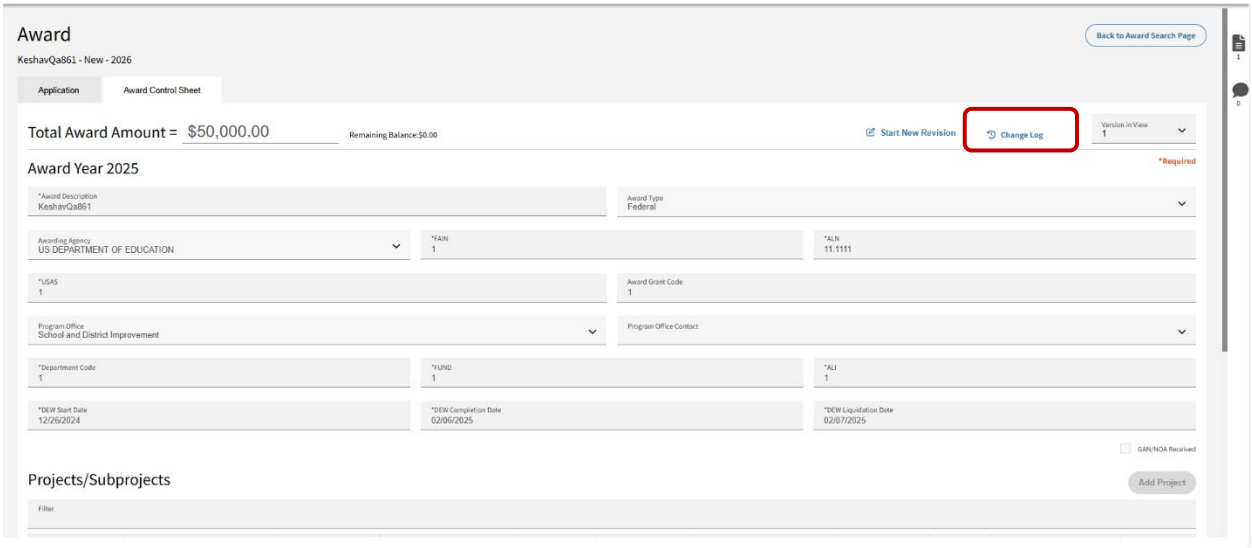


Figure 13. Change Log Option is Selected

Changes are indicated with the old value in strike-through font and the new value being shown in either green for a positive value or red in parentheses for a negative value. The user can compare different revision versions using the dropdowns at the top of the page. When the user is done reviewing the change log and wants to navigate back to the Award Control Sheet, simply select “Close Change Log”.

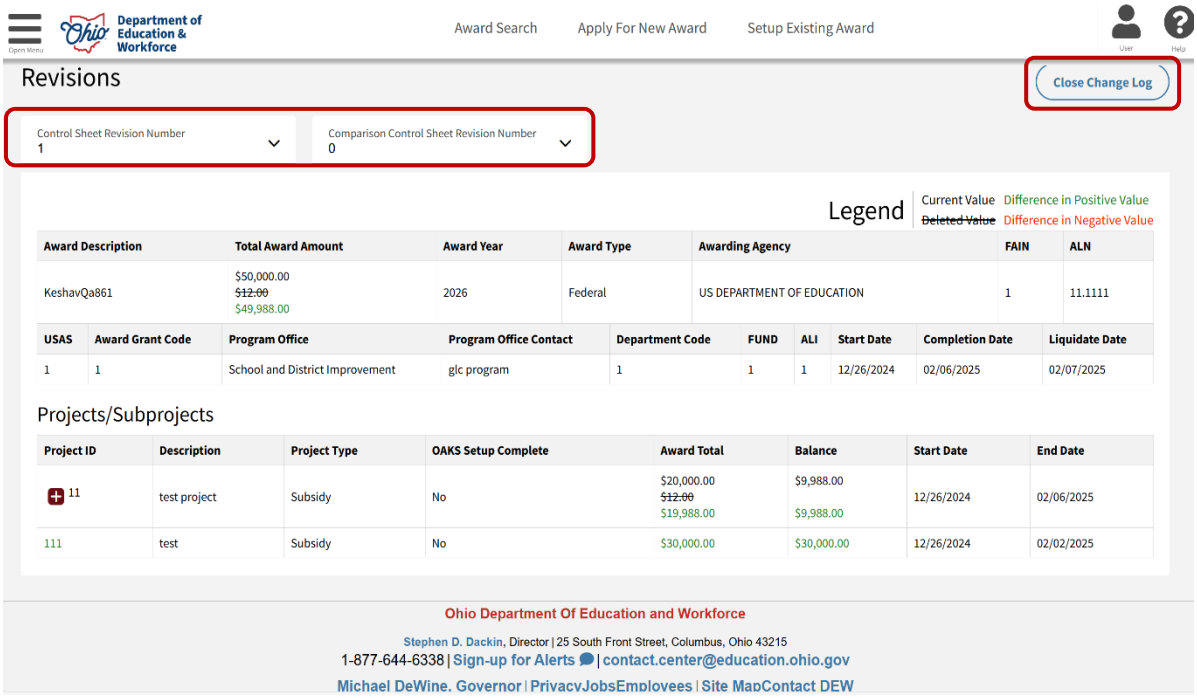


Figure 14. Change Log

Common Components

DOCUMENT UPLOAD

Documents can be uploaded to the Award Application and Award Control Sheet using the Document Upload utility. Common documents to attach to the Award Application and Award Control sheet include a NOA/GAN, preliminary allocation spreadsheets, and supporting documentation for the calculation of projects/subproject amounts.

Note: *If a document is uploaded on the Award Application page, it will be seen on the Award Control Sheet and vis versa.*

To upload a document, select the document icon on the right-hand side of the screen.

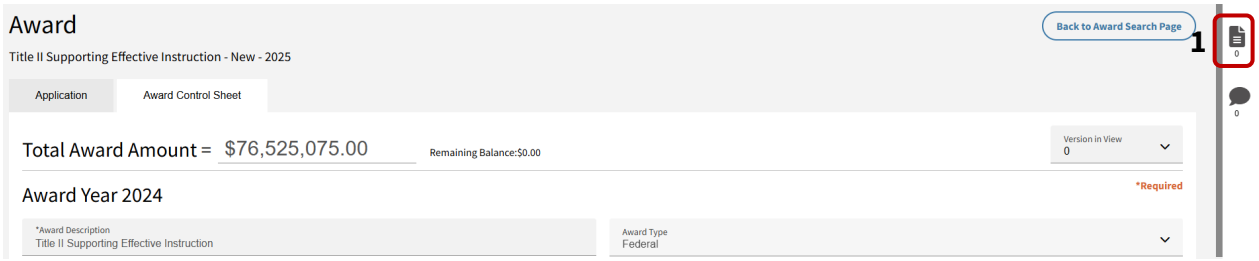


Figure 15. Select the Document Utility

"Add Document button" to generate the next step.

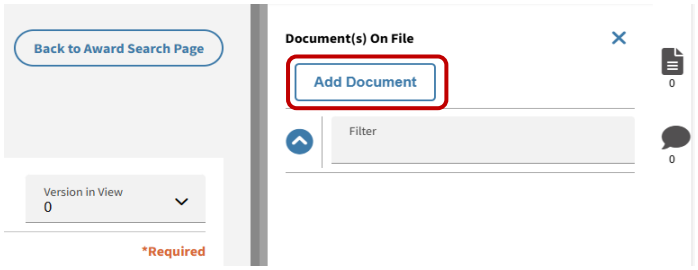


Figure 16. Select the Add Document Button

The Document Type must be selected before any document can be uploaded. Files can either be dragged to the document upload box or click within the upload box to open File Explorer.

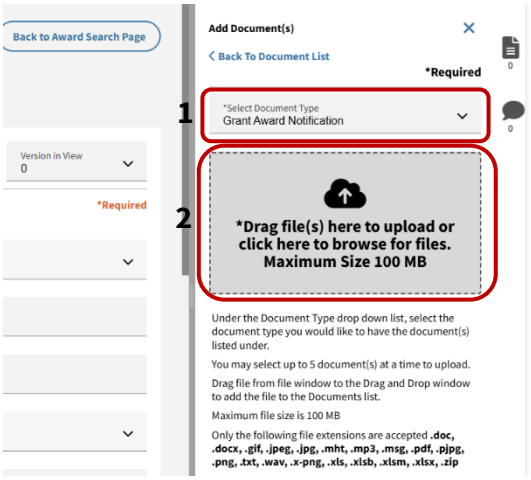


Figure 17. Steps to Adding Document

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A document has been added successfully when the blue bar appears, and the document utility count has been increased by one. To verify the document has been attached, go back to the document list.

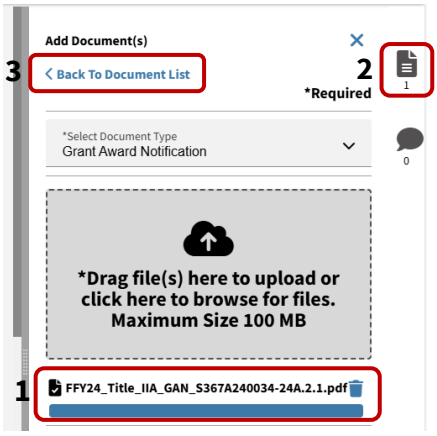


Figure 18. Document has been Successfully Uploaded

Documents that are added can be edited, deleted, and downloaded from the document list.

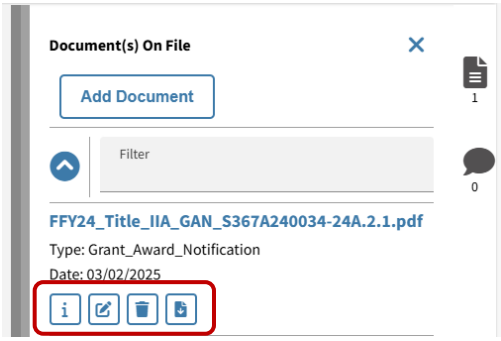


Figure 19. Options to Edit, Delete, and Download Uploaded Document

HISTORY LOG

The history log captures the workflow changes for the Award Application and Award Control Sheet. It documents who updated the workflow and when. If a comment is added during the workflow step change, it is also captured.

To open the history log, click on the “H”. The log will populate from the right-hand drawer. If a comment has been added, a blue chat icon will appear next to the workflow step.

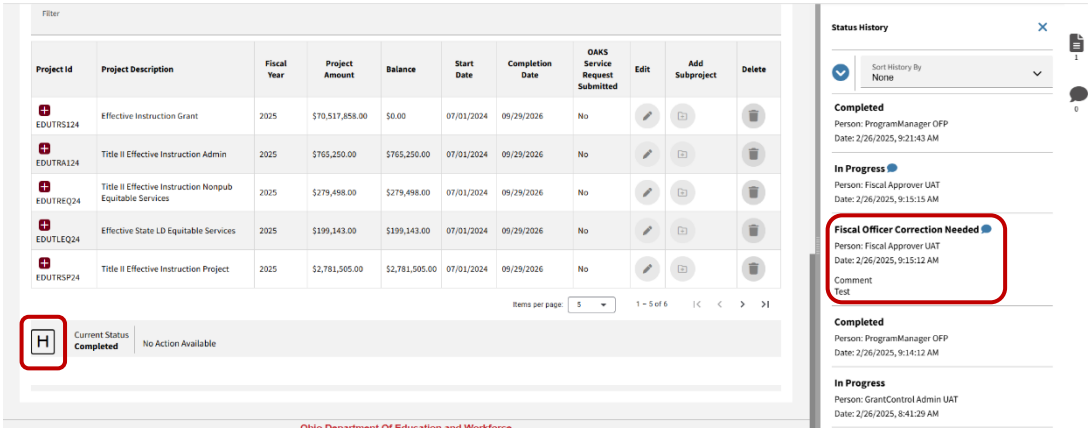


Figure 20. History Log

COMMENTS

If a note or other communication needs to be added to the Award Application or the Award Control sheet, a comment can be added from the right-hand drawer. This is separate from comments that are added when changing the workflow status.

To add a comment, select the comment bubble and then “Add A New Subject”.

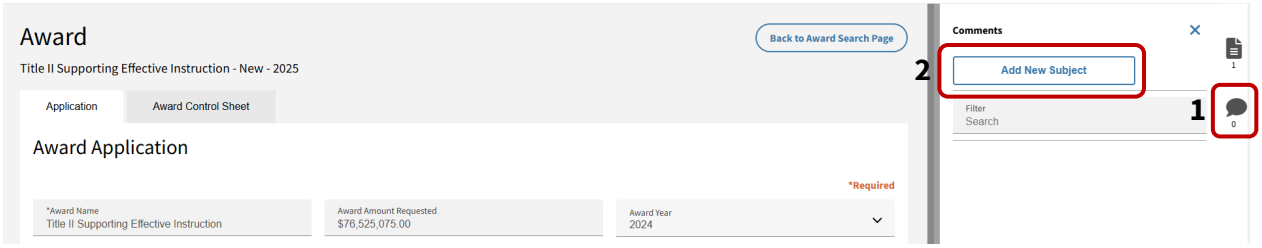


Figure 21. First Steps to Adding a Comment

Click on the “Internal Comment” checkbox, add a title, and then the note. Select “Add New Subject” to add the comment.

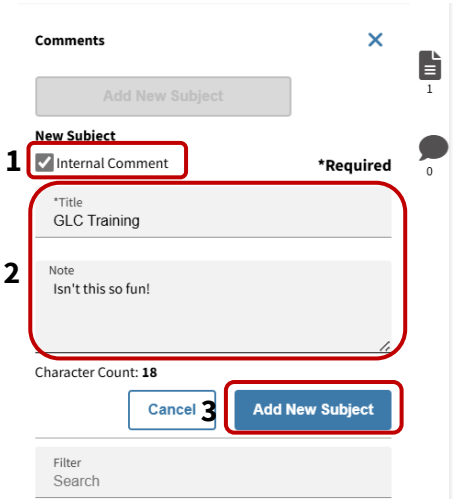


Figure 22. Second Steps to Adding a Comment

Comments will then appear in the list where other users can view and reply as needed. The comment icon will also indicate that a comment has been added by the number increasing by one.

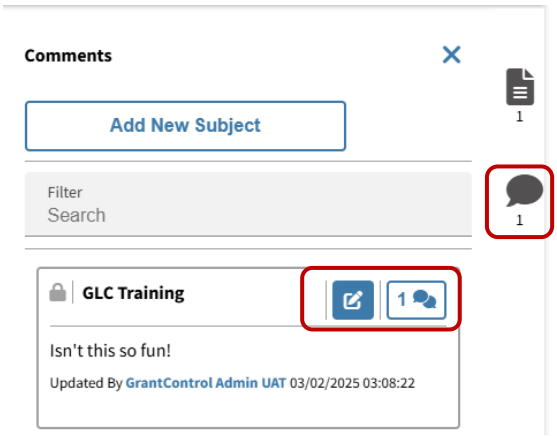


Figure 23. Comment has been Added

Appendix A. Grant Lifecycle Dictionary

Accounting Line Item (ALI)- This is part of the payment codes used by DEW Fiscal Services.

Assistance Listing Number (ALN)- *Federal Grants Only* - A unique five-digit number, formally known as the CFDA Number, assigned to a program or activity within the Assistance Listings. The first two digits identify the federal funding agency that administers the assistance. The final three digits following the decimal represent the assistance listing. The ALN is an identifier for federal grants and is used for governmental tracking, reporting and auditing purposes.

Award Amount Received- Amount of money that the Department has been awarded as listed on the Grant Award Notice/Notice of Award.

Award Amount Requested- Amount of money that the Department requested in the award application or through the preliminary allocations.

Award Description- The Award Description is the same as the Award Name entered on the Award Application Page. Do not include the ALI, award grant code number or fiscal year in the Award Description.

Award Grant Code- *Federal Grants Only* - The last two characters should be updated each year using the last two digits of the federal fiscal year. The federal fiscal year can be confirmed by the 6th and 7th character of the FAIN. For example: S424H240015.

Naming convention for new awards received by DEW. The maximum number of characters is nine (9).

The first 3 characters should be "EDU" for our agency. The 4th character should be "F" for federal. Characters 5 through 7 should reflect the award name. Characters 8 & 9 should be the Federal fiscal year.

For Example EDUFSCH24
Note*: Please verify with Fiscal that the newly created Grant Award Code does not already exist.*

Award Name- The Award Name is entered on the Award Application screen and becomes the Award Description on the Award Control Sheet. Do not include the ALI, award grant code number or fiscal year in the Award Name.

Award Year- The year DEW allocates the Award. Same as the State Fiscal Year.

Bill- *State Grants Only* **-** Number associated with the legislation that allocates funding to the award

Department Code- This is part of the funding codes used by DEW Fiscal Services.

DEW Completion Date- The period of availability end date for the award. This is the last day a DEW may obligate funds.

DEW Liquidation Date- This is the last day a DEW may liquidate (issue payments).

DEW Start Date- The date that begins the period of availability (state of obligations) for DEW. For Federal grants, the date should be reflected on the GAN.

Federal Award Identification Number (FAIN)- *Federal Grants Only* - Unique ID within the Federal agency for each financial assistance award. The FAIN is used to track financial assistance awards. The FAIN is located on the GAN. The FAIN is normally 9 characters, and a combination of letters & numbers. Characters 2 through 5 consists of the last 4 characters of the ALN. Characters 6 & 7 are the federal fiscal year.
For example:

FAIN: **S424H240015**
ALN: **84.424H**

Fund- Identifier that is generated by constitutional provisions or special statutes to help ensure that money is spent for purposes specified in appropriations.

Funding Source- A grant that has been established within the One Funding Application (OFA) that can be linked to a subproject. Only funding sources that have not yet been used within an Award Control Sheet for a fiscal year can be selected.

Grantor- This is the awarding agency.

OAKS Setup- This is used by Grants Management to confirm the grant is set up in OAKS. Grants Management will update the OAKS status when service requests are completed to add or modify budgets in OAKS.

Project Amount- Monetary amount for project.

Project Completion Date- Date on which the project will end.

Project Description- maximum of one sentence describing the project.

Project ID- Project IDs are based on Award Grant Code. Characters 1-3 are the same as 1-3 of the Award Grant Code. Characters 4 & 5 are the same as 5 & 6 of the Award Grant Code and

Characters 6 & 7 reflect the Project Description. Characters 8 & 9 are the federal fiscal year or the last two characters of the Award Grant Code.

For Example:
Award Grant Code: EDUF6B24
Project ID: EDU*6B*SF24

Program Office- Name of the office with the Ohio Department of Education and Workforce that is responsible for the award and/or a project.

Program Office Contact- Name of the individual within the program office that should be contacted for the specific award and/or project.

Project Start Date- Date on which the project will start.

Project Type-

Administration- Funds that are designated to cover DEW operating expenses such as salaries and/or indirect costs.

- Subproject Not Allowed

Contract- A document used to obtain goods and services for DEW's use and creates a procurement relationship with the vendor. A vendor relationship exists when the purchased activity is for the direct benefit of DEW and is activity that is within the vendor's normal business operations.

- Subproject Allowed: Contract

Discretionary/Set Aside- Funds identified in the State budget to be used to support a specific program or purpose.

- Subproject Allowed: Discretionary/Set Aside

Earmark- In the State budget, Earmarking sets aside part of an appropriation for a specific purpose. Earmarks may be mandatory or permissive and may be for an exact amount, a maximum amount ("up to"), or a minimum amount ("not less than").

- Subproject Allowed: Earmark

Multiple- Can include any combination of project types.

- Subproject Allowed: Grant, Administrative Costs, Contract, Earmark, Discretionary/Set Aside

Subsidy- Grant funds the DEW awards to another entity, company, individual, etc., thus creating a subrecipient relationship.

- Subproject Allowed: Grant

Subproject Amount- Monetary amount for subproject.

Subproject Completion Date- This is last day that DEW is authorized to enter into obligations for the subproject. Note: This date may be different for grantees.

Subproject ID- The Subproject ID is based on the Project ID. The subprojects add a letter from the alphabet at the end in sequential order. For Example:

PROJECT ID	EDU6BSF24		
SUBPROJECT IDs	EDU6BSF24A	EDU6BSF24B	EDU6BSF24C

Subproject Name- This is the name of the subproject/grant. This is the name that will be displayed to grantees.

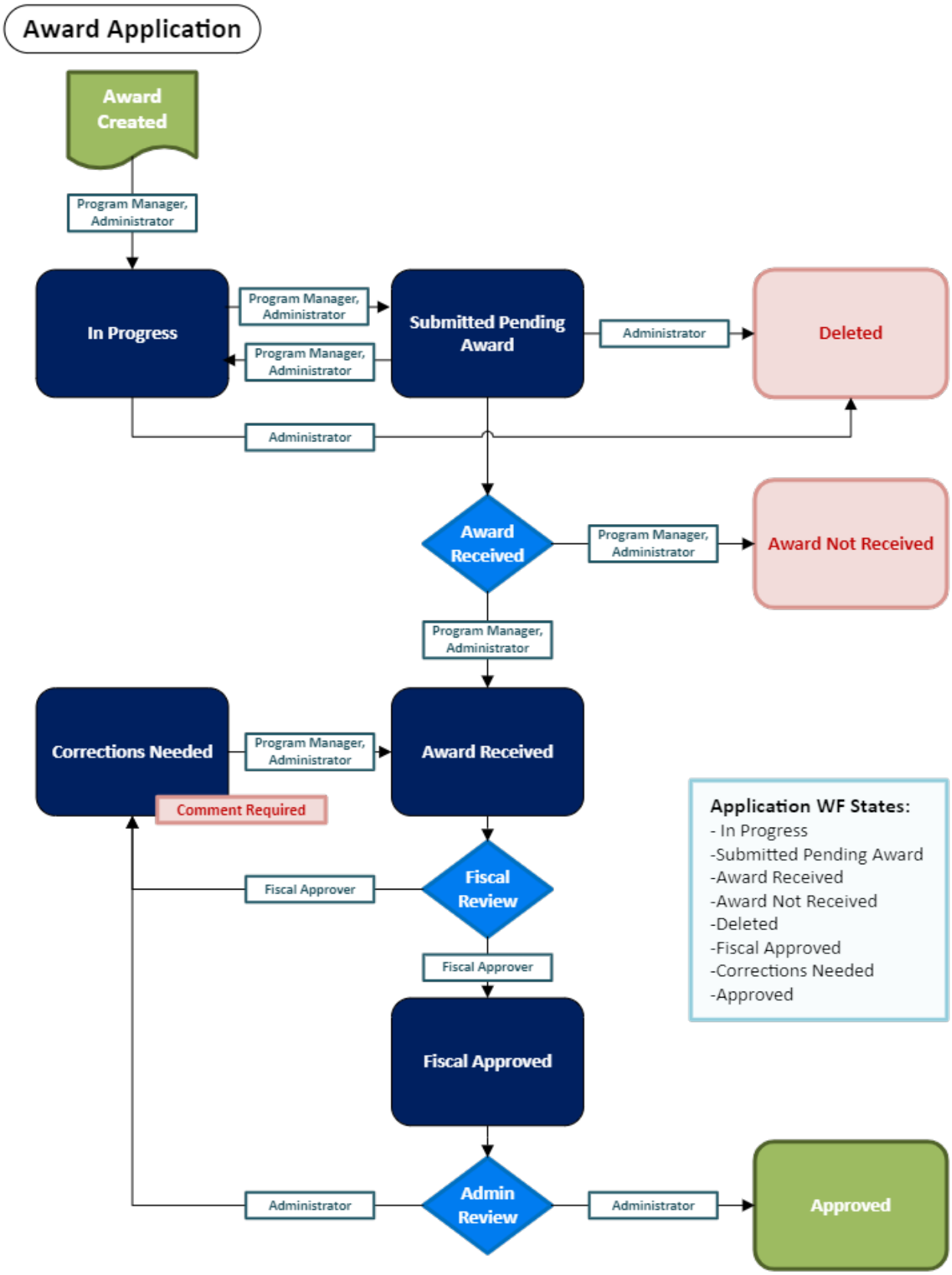
Subproject Start Date- This is the date that DEW is authorized to award funds and enter into obligations. The dates must align with the grant award dates. Note: Grantees may only obligate funds after submitting an application.

Subproject Type- The Subproject Type aligns with the Project Type. For example, if Subsidy was selected at the Project level, only Subsidy subprojects are applicable to that Project. If you need a different Subproject Type, create a new Project. Note that Subprojects are not necessary and therefore cannot be created for the Admin Project Type.

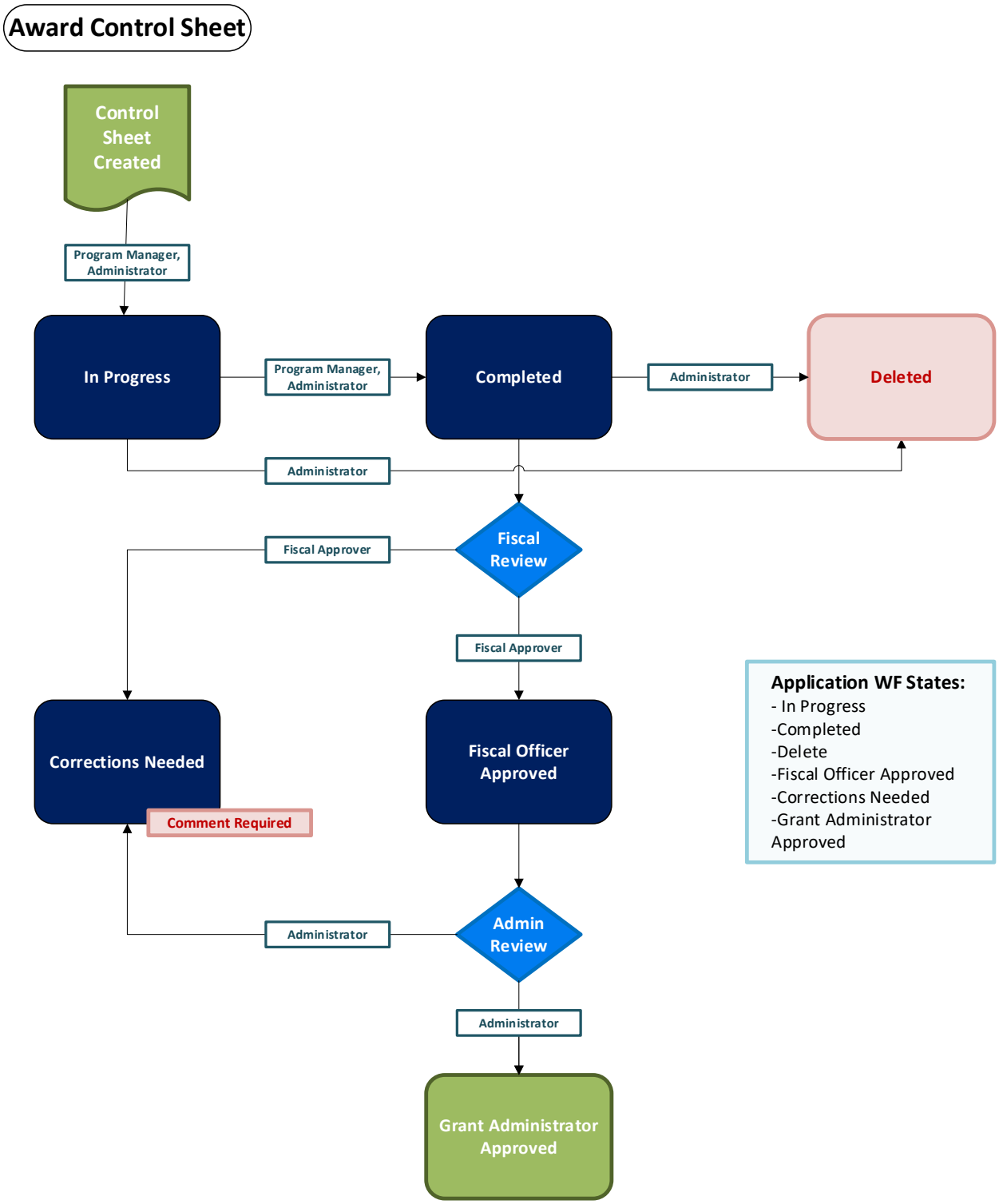
Type of Grantor- This is the awarding agency: Federal, State, Non-Profit, or Other.

Uniform School Accounting System (USAS)- System which uses a combination of dimensions (different sets of codes, each of which supplies different elements of information) to identify financial transactions.

Appendix B. Award Application Workflow



Appendix C. Award Control Sheet Workflow



Department of Education & Workforce