Guide to the CSBG Grant Application

Community Service Programs = CSP
Grant Application Programs = GAP
Grant Application Workplans =GAW
Budget Details = BD

Community Service Programs (CSP) Grant Overview

- All users must have completed the confidentiality agreement to use OCEAN.
- Refer to OCEAN Training Manual for CSBG Grant Programs. The manual has detailed instructions with screenshots on how to navigate OCEAN.
- The OCEAN Help Desk is available for general support issues. You may create a help desk ticket if your issue doesn't require immediate attention or you may contact the Help Desk at 1 (888) 995-2227. If you have questions or issues regarding your CSBG Grant Application, please direct those calls to your OCA Field Representative.
- The grant instructions are located under "Grant Application Documents.".
- The Grant Application Search is located under the "Programs" drop-down list.
- To search for your agencies grant, click on "Grant Application Search"
- Select the Executive Director, Contact Person, and Board Chair Person and hit **save**. Once you **save** the CSP Grant, you will then see the GAP, GAW, BD and other grant information links.
- The order for completing the grant is to start with the GAP. You do not have to enter all of the information in the GAP to view the program in the BD. You must enter the funding information in the GAP to see your program in BD.
- The GAW can be completed at any time after the GAPs are completed. The information in the GAPs is shared with the GAW so it is important to complete the GAP first.
- The CSBG funds for your GAP, GAW, and BD must all equal your grant allocation before OCEAN will allow you to submit your Grant Application.

Grant Application Programs (GAP)

- When you add a CSP program, you will only see the "Common" and "CSP Specific" links in the left navigation window. You must **save** the program before the other links appear. **Important:** The naming convention for your program must be "*2012-2013 Program Name.*" Example "2012-2013 Emergency Services."

- Select Milestone automation when you want OCEAN to keep track of the Program Milestone achievements. The Benefits and Activities that are explicitly tied to a Program Milestone act as the verification(s) for the Program Milestone.

- The Funding Sources section will show you the amount of funding utilized for the program. Enter all of your funding sources here.

    - If you are utilizing 2012 – 2013 CSBG funds for the program, enter the amount of CSBG funds and click on "Import." The dollar value shown below "Amount Remaining" reflects the CSBG dollars available for use.

    - When you enter a second program, the middle section will highlight the programs utilizing 2012-2013 CSBG funds along with the amount.

- The Activities section provides the ability to insert all of the activities associated with the program. OCEAN will have the ability to report on activities accomplished by the customer. Activities may or may not serve as verifications for your Program Milestones.

- The Benefits section provides the ability to insert all of the benefits the customer may receive. OCEAN will have the ability to report on benefits received by the customer. Benefits may or may not serve as verifications for your Program Milestones.

- The Income Sources section displays the income(s) used in the eligibility determination for the program. Check the incomes that apply.

- The Custom Ineligibility Reasons are specific to the program. Agencies have the ability to add their own ineligibility reasons. Example: "Not a resident of the county" or "Customer already received a benefit in the last 12 months."

- The Program Milestone section is the outline of steps required for the program outcome to be accomplished. Activities and Benefits act as verifications for the Program Milestone. Be careful when selecting multiple verifications because all of the verifications must be accomplished before the Program Milestone is obtained. ROMA Goals #1 and #6 – Child and Family Development utilize the Program Milestone.

- The Program Organization milestone section is the outline of steps required for the program outcome to be completed. ROMA Goals #2, 3 and 5 utilize the Program Organization Milestone. The Program Milestone section is also available for agencies who wish to keep track of client level information. Agencies will have the ability to report on the Program Milestones.

- ROMA Goals #6 – Emergency Services and Independent Living utilize the Benefit Funnel. The Benefit Funnel appears on the GAW. The benefits listed in the Benefit Funnel are determined by the benefits entered on the GAP Benefit's section.

- The Client Survey is a volunteer survey for the client. The format is "Yes" or "No." The survey provides important information on customer feedback and can assist with outcome verification.

Grant Application Workplans (GAW)

- The Workplans Details Section is where you will select the type of program for which GAP you are creating a ROMA Workplan.
  - Check the OCEAN Program when you want OCEAN to calculate the results for your quarterly results. OCEAN will determine the Program Milestones accomplished based on the Benefits and Activities the clients receives.
  - When the External Program is checked, you will enter the results manually on a quarterly basis.
  - Be careful when selecting the Goal, Framework Code and Program Code. Your selections will determine which GAP that will be available. You need to use the same codes that were used in the GAP so you can link the GAW. The Framework Codes and Program Codes are located under the "Help" drop-down list.
- The Workplan Narrative is required for all programs. The narrative should explain who, what, when, where and how the program will be implemented.
- The Workplan Funding Source Type is where you enter you quarterly projections for your funding source types. The Value of Volunteer Time is derived from the # of Volunteer Hours.
- The Workplan Community Involvement is transferred from the GAP Funding Sources Section when the Funding Source Type = "In Kind."
- The Workplan Program Partners is transferred from the GAP Program Partnership section. If the partner is not listed in OCEAN, please create a ticket and send the information to the OCEAN Help Desk.
- The Workplan Developmental Framework must be utilized when the program has partnerships.
- The Goal Details section is the Customer Funnel, Organizational Funnel or Benefit Funnel. The type of funnel depends on the ROMA Goal selected in the GAP.
  - The Milestones will be listed along with the verifications. Select the appropriate Milestone and Measure that will correlate with the measure at the bottom of the funnel. In most cases, only one milestone will apply to each measure. Example: For the measure "Customers Enrolled", select the milestone that represents customer enrolled and select the measure in the drop down list. Warning: If you select more than one milestone with the measure "Customer Enrolled", the numbers will be aggregated.
- The Workplan R&L Meeting Notes are required for each program.

Budget Details (BD)

- Each CSP program that utilizes CSBG funding will require it's own budget and the aggregate total of the CSP program budgets must equal the Grantee CSBG allocation. Grantee Administration costs will be allocated across all CSP Programs funded with the CSBG grant.

- The BD section of the Grant Application is used to enter employee salary information and budget (direct and indirect costs) data. You cannot enter the budget information until the programs are setup with at least the correct funding source and funding source amounts entered.

- There are two tabs in the BD section, the Salary Summary and Budget.

- The Salary Summary is used to enter an employee's salary. After you have entered the employee's salary, click on the Details link to the right of the salary. This will allow you to spread the employee salary across multiple programs.

- The Budget tab allows you to enter Direct and Indirect Costs. Click on the arrows next to Direct and Indirect Costs to expand the categories. Click on the Details button to the right of the page for the category you want to edit.

- The Budget Total, Budget Allocated and Budget Remaining show the amount of CSBG funds utilized for the program.

- **The Budgeted totals for your programs must equal your CSBG allocation. OCEAN will not allow you to submit a CSBG Application Grant if your budget does not equal your CSBG Allocation amount.**

Grant Application Documents

- The required documents, assurances and grant instructions will be listed here. You can click the View button to open the report. You can print the document or **save** it to your computer.

- After you have entered the information on the document, you can upload the document to OCEAN. Click on Attach and you will get a Document Upload window. Locate the file on your PC or network and upload the file. Enter the file type and a description of the file.

- OCEAN will not allow you to complete your CSBG Application Grant until all of the required documents are attached.

Grant Application Checklist

- All of the required budget reports can be viewed here by clicking "View."

Grant Submission

- Once the grant application is completed by the agency, it can be submitted for review and approval/rejection by OCS field representatives. The Submit button is located next to the **save** button in the blue bar near the top of the page. OCEAN will not allow you to submit your grant application if your amount does not reconcile or you are missing required documents. Your CSBG Grants are due to OCA on November 30, 2011, by 5:00 p.m.

Reporting

- The reports are located under the "Utility Manager" drop-down list. Click on Report Launcher and then the arrow next to AGENCY Reports. Click on the arrow next to CSP Reports to view the reports.

Case Management

- Referrals for the client Case Management function are accomplished on the Client Search screen or inside a client application. Click the "Referral" button to access the Referral screen.
    - Enter the referral criteria and select the appropriate customer needs.
    - Click on the "Get Referrals" and a report will be generated showing the program name and if the customer is likely or unlikely to be eligible for the program.
    - Select the programs the customer is interested in and click on "Submit Referral" located at the bottom of the report.
    - The referral report is generated with the minimum eligibility requirements and the benefit eligibility list.

Inventory Tool

- OCEAN can provide supply and inventory control for merchandise. The inventory tool is located under the "Utility Manager" drop-down list. Click on Inventory and then CSP Inventory. OCEAN will keep track of your inventory items. OCEAN will not allow you to assign a benefit if the inventory is less than the benefit being applied.
- The inventory is setup by program and benefit. If you want to use the CSP inventory for a benefit, check the "Use CSP Inventory" option in the GAP located under Benefits.

Support

- **The OCEAN Help Desk is available for general support issues. You may create a help desk ticket if your issue doesn't require immediate attention or you may contact the Help Desk at 1 (888) 995-2227. If you have questions or issues regarding your CSBG Grant Application, please direct those calls to your OCA Field Representative.**