



# SABG GRANTEE PROCESS GUIDE

HOW TO USE NEIGHBORLY, SUBMIT  
REIMBURSEMENT REQUESTS & ACTIVITY  
REPORTS, ADMINISTER SURVEYS, AND  
ACCESS ODP'S ONLINE TRAININGS



# FY2022

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# Accessing Your Grantee Portal

## Logging In

The Grantee Portal is hosted by Neighborly Software and is accessible available via any internet connected device. The recommended browser is Google Chrome, but will work with any modern web browser (i.e. Internet Explorer v10+, FireFox, Safari).

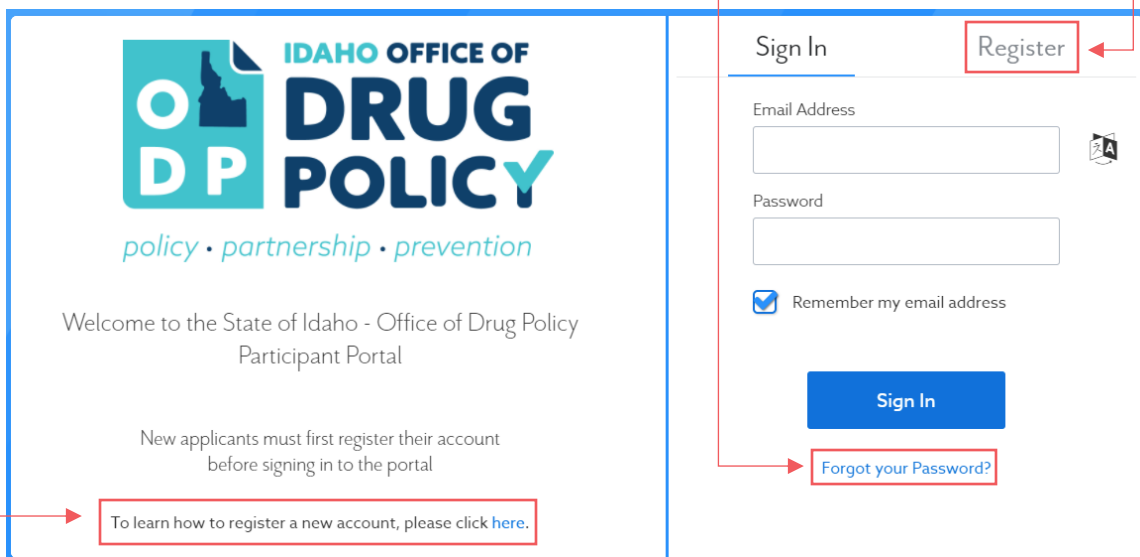
**Grantee Portal Link:** <https://portal.neighborlysoftware.com/ODPIDAHO/Participant>

## Registering a New Account


Don't have an account? To learn how to register a new account go to the [Grantee Portal](#) and select *Register* or click on the link for registration instructions.

## Forgot Your Password

If you forgot your password, go to the [Grantee Portal](#) and select *Forgot Your Password*.



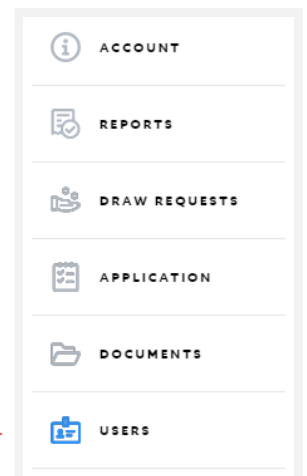
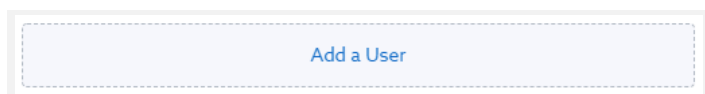
## Changing Your Password

To change your password, log into your Grantee Portal. Click on the  icon on the top right corner of the screen and select "My Profile". Then select the Password option on the left side of the screen. For security purposes, you will be required to enter your Old Password before selecting a New Password.

## Adding a New User to Your Grantee Account

If another staff member at your organization will be supporting your grant reporting and/or submitting reimbursement requests, you will need to add them as a user to your Grantee Portal.

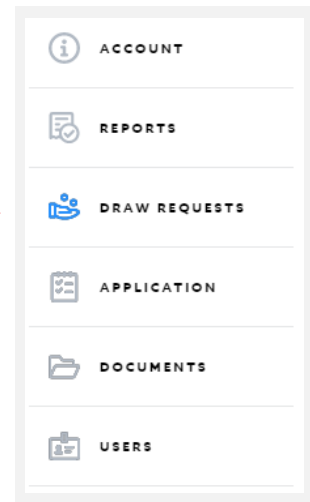
To do this, log into your Grantee Portal and select your grant. Click on the *USERS* tab on the left-hand navigation menu, then select *Add a User*.



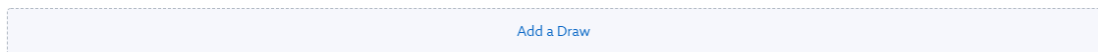
# How to Complete a Reimbursement Request

To submit a request for reimbursement, log into your [Grantee Portal](#) and follow these steps:

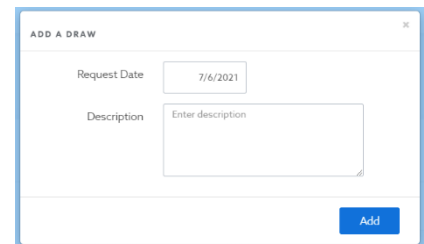
1. Select the **DRAW REQUESTS** tab on the left-hand navigation menu



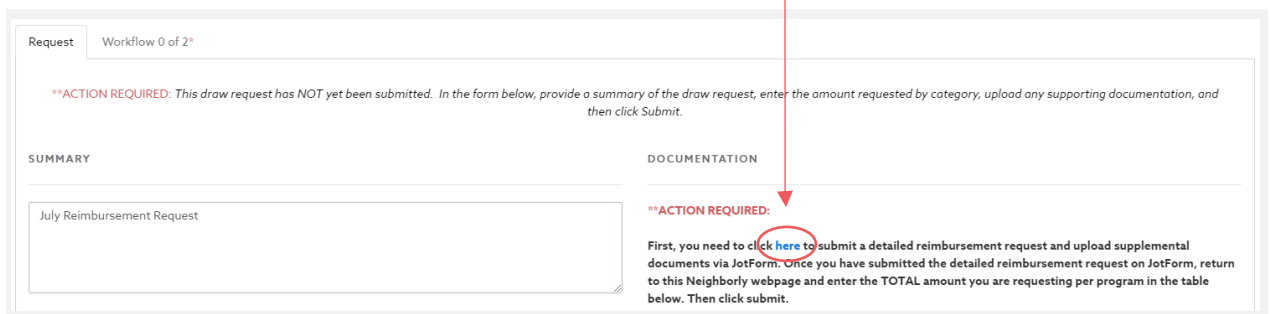
2. Click **Add a Draw**



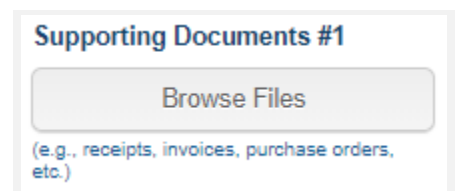
- 2.1. A white box will pop up on the screen. Enter the request date and a brief description. The description can be as simple as *July Reimbursement Request*, *[Organization Name] Reimbursement Request*, *[Date] Reimbursement Request*, etc.



3. Click on the [hyperlink](#) to submit a detailed reimbursement request and upload supplemental documents via JotForm.



- 3.1. Up to five expenses can be entered within the JotForm.
- 3.2. Supporting Documents (e.g., receipts, invoices, purchase orders, etc.) will be uploaded via JotForm at the bottom of the expense page by clicking *Browse Files*.



- The final page of the JotForm will list the total amount requested by program. These will also be listed in the notification email you receive when you submit the JotForm reimbursement request. **You will need to enter the amount(s) requested per program(s) into the draw request in your Grantee Portal.**

Program	Amount Requested
Active Parenting	150
Class Action	300
Project Towards No Drug Abuse	690

<b>Total Requested Amount</b>	<b>Total Administration Fee</b>	<b>Total Reimbursement Amount</b>
<input type="text" value="950"/>	<input type="text" value="190"/>	<input type="text" value="1140"/>

By sending in this form, you certify that the amount detailed represents expenditures of funds for the period covered and for the total project, all made in accordance with the approved budget for the above-named project.

Signature

[Clear](#)

- Once you submit the JotForm, return to the Draw Requests page in your Grantee Portal. **Enter the *Amount Requested* by Program into the Draw Request. Click *Submit*.**

Program Category(ies)

Amount(s) Requested

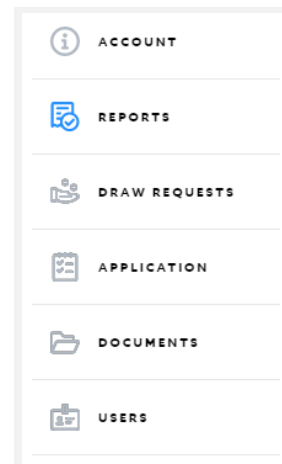
DETAILS	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	= AVAILABLE BALANCE	AMOUNT REQUESTED
CATEGORY Active Parenting SABG 2021/22	<input type="text" value="\$ 500.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 500.00"/>	<input type="text" value="\$ 150.00"/>
Class Action SABG 2021/22	<input type="text" value="\$ 750.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 750.00"/>	<input type="text" value="\$ 300.00"/>
Project Towards No Drug Abuse SABG 2021/22	<input type="text" value="\$ 1,000.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 1,000.00"/>	<input type="text" value="\$ 690.00"/>
Totals	<input type="text" value="\$ 2,250.00"/>	<input type="text" value="\$ 0.00"/>	<input type="text" value="\$ 2,250.00"/>	<input type="text" value="\$ 1,140.00"/>

Last updated by jessie.dexter@odp.idaho.gov on 7/7/2021 5:28:23 PM

## How to Submit a Quarterly Report

To access your quarterly grant activity reports, log into your [Grantee Portal](#), select your grant, and follow these steps:

1. Select the **REPORTS** tab on the left-hand navigation menu



2. The reports will be listed based on reporting period and date range. **Select the report that you want to complete by clicking Start.**

*(Note: reporting dates in the image below have been adjusted for training purposes. FY22 SABG grantee reporting periods do not begin until July 1, 2021).*

Reports

Quarterly Report (0 of 4)

PERIOD	DATE RANGE	DUE DATE	STATUS	# FILES	SUBMITTED BY	ACTION
1	4/1/2021-6/30/2021	7/10/2021	Available Now	0		Start
2	7/1/2021-9/30/2021	10/10/2021	Available 9/30/2021	0		
3	10/1/2021-12/31/2021	1/10/2022	Available 12/31/2021	0		
4	1/1/2022-3/31/2022	4/10/2022	Available 3/31/2022	0		

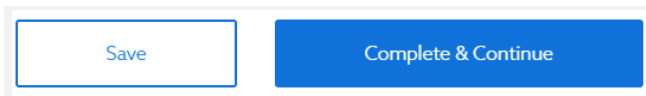
To complete and submit your activity reports, follow these steps:


1. Once you select and open a report, you will notice that there is a menu along the top of the report with six tabs for *Program One*, *Program Two*, *Program Three*, *Program Four*, *Program Five*, and *Submit*. Do not worry if you have less than five programs, you will only be required to report on the number of programs you received funding for.

Reports > Quarterly Report > 91

A. Program One    B. Program Two    C. Program Three    D. Program Four    E. Program Five    Submit

- The report will automatically start with Program One. You will be asked to provide information on:
  - Program Information:** Program/Activity Type, Program Activity/Name, Strategy, and IOM Category
  - Population Risk Factors**
  - Cohort Information:** Total Number of Cohorts Completed to Date, Total Number of Sessions Completed to Date (*note: this is the total number of cohorts and sessions completed in the reporting period/quarter for which you are currently reporting on*).
  - Participants by Race, Ethnicity, and Gender**
  - Program Fidelity:** Answer a series of questions about the delivery and quality of the program curriculum and sessions. Identify and explain any improvements or changes.
  - Any Additional Comments**
  - Documentation:** Grantees are required to upload their Attendance Records Spreadsheet. This can be found under the *DOCUMENTS* tab on the left-hand navigation menu or accessed via this [LINK](#).
- When you finish reporting on *Program One* you can either select *Save* to save the report and complete it at a later date, or *Complete & Continue* to report on additional programs/activities and/or proceed to submit your report.



- Next, if you want to report on additional programs/activities and/or proceed to submit your report, scroll up to the top of the Reporting page.
  - If you have an additional program/activity to report on: you will select the next Program tab in the menu along the top of the Reporting page.
  - If you have finished reporting on all of your programs/activities: you still have to select the next *Program* tab in the menu along the top of the Reporting page, scroll to the bottom of the Program page and select *Complete & Continue*.
    - Do this until all of the Program tabs have been marked as completed with the  green check mark. Then, select the Submit tab, electronically sign the report, and click *Complete & Submit*.

A screenshot of a web application interface. At the top, there is a breadcrumb trail: 'Reports &gt; Quarterly Report &gt; 91'. Below this is a horizontal menu with five tabs: 'A. Program One', 'B. Program Two', 'C. Program Three', 'D. Program Four', and 'E. Program Five'. Each of these tabs has a green checkmark to its left. To the right of these tabs is a 'Submit' button with a square icon. A red box highlights this entire menu area. A red arrow points from the text 'scroll up to the top of the Reporting page' to the top of the page. A green arrow points from the text 'green check mark' to the checkmark on 'B. Program Two'. Below the menu is a 'Submit' section with the text 'Please provide the following information.' and a 'Signature' field containing a button that says 'Click here to electronically sign'. At the bottom of the page, there are two buttons: 'Save' and 'Complete &amp; Submit'. A light blue footer bar contains the text: 'This step was last updated by jessie.dexter@odp.idaho.gov on 7/7/2021 1:20:06 PM.'

## SABG Pre and Post Test Survey Information

Grantees providing **direct curriculum-based prevention education** (e.g., LifeSkills, Positive Action) are required to conduct pre- and post-surveys prior to, and after, the completion of each program cohort. These surveys are used to inform the overall SABG program evaluation. Additionally, after the program year providers will receive a summary outcome report of their programs' survey results.

**Please review the following steps for instructions on how to obtain and implement the surveys:**

1. Review the following documents:
  - [FY22 Instructions for Survey Administration for Prevention Programming](#)
  - [Parental Consent Policy](#)
2. ODP creates individualized pre- and post-survey templates specific to each provider's programs. **ODPs Research Analyst, Cheryl Foster ([cheryl.foster@odp.idaho.gov](mailto:cheryl.foster@odp.idaho.gov)) will email individualized PDF survey templates to each provider by July 16, 2021.**
3. ODP can also create an online version of the survey upon request. Contact Cheryl Foster if you would like to utilize the online survey option.

If you have any questions or concerns regarding the surveys, please contact Cheryl Foster at [cheryl.foster@odp.idaho.gov](mailto:cheryl.foster@odp.idaho.gov) or (208)854-3048.

## ODP Learning Management System and Training Opportunities

The Idaho Office of Drug Policy is pleased to provide free online courses to support the fulfillment of SABG grantee Provisional Prevention Specialist (PPS) and Certified Prevention Specialist (CPS) requirements through our learning management system.

**As of June 2021, ODP has launched eight additional CPS and Strategic Prevention Framework focused courses:**

1. *The Strategic Prevention Framework: A Practical Application (3 hours)*
2. *Planning and Evaluation (4 hours)*
3. *Identifying Evidence-Based Policies, Programs, and Environmental Strategies (3 hours)*
4. *Implementing Direct Service Programs with Fidelity (3 hours)*
5. *Principles of Community Organization for the Prevention Specialist (6 hours)*
6. *Principles of the Environmental Approach to the Prevention Specialist (3 hours)*
7. *Capacity and Readiness for Prevention with Special Populations (3 hours)*
8. *Sustainability and the Prevention Profession (4 hours)*

Learn more about ODPs learning management system, available online courses, and find instructions for registering and navigating the platform at [www.prevention.odp.idaho.gov/training](http://www.prevention.odp.idaho.gov/training)