



Regional Training- A Closer Look at the Grants Management System and the Prevention Data Portal

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2024 February and March Regional Trainings**

- Training Objectives:
 1. Discuss briefly the prevention data portal forms and provide tips related to completing the 6 strategy-type forms in the prevention data portal (10-10:30 am)
 2. Demonstrate creating and pulling reports from the Grant Management System (GMS) linked to the Prevention Data Portal (10:30-11:30 am)
 3. Demonstrate the linkage between monthly data reports that can be pulled from GMS and the financial reimbursement requests entered into GMS for approval by DAODAS (11:30 am- 12:00 pm)
 4. Discuss briefly other customized reports that can be built for program monitoring/evaluation of outcomes and reporting on mid-year/year-end reporting metrics in GMS (12:00 pm-12:30 pm)

Data Collection Portal

- Portal URL: <https://das-prod.powerappsportals.us>

- **Navigation**

- The DAODAS Portal is comprised of a Home Page, Forms library, and a My Forms view. Users must complete the portal registration process and be signed in to access each page. The sections below offer an overview and/or functionality of each page.

- **Home Page**

- The Home Page offers information about the portal, including instructions and important dates

- **Forms**

- The Forms library includes forms grouped by strategy. By default, strategies are collapsed. Clicking the drop down next to a strategy displays the related forms.
- Clicking on a form launches the form detail. Each form contains a series of fields for reporting on an event or activity. The top section in each form contains fields that display a list of options that are filtered based on the authenticated user's set-up in Dynamics 365 (D365), which is managed by the DAODAS Prevention team.
- The Organization field displays only those organizations to which the authenticated user is assigned in D365.



Contact Us

Forms

My Forms

Stacey Wilcox ▾



[Home](#) > **Forms List**

From the drop down menu under each CSAP Strategy, please select the form to complete for the service implemented. Data from each form submitted will be applied to the Performance Measure selected on the form. Once a form is submitted, it cannot be edited without assistance from DAODAS. Please contact DAODAS at prevention@daodas.sc.gov if you need assistance editing a form that has been submitted.

Where staff participants are capture, in the event a contact is not available, please contact DAODAS at prevention@daodas.sc.gov.

Community-Based Processes ▾

Information Dissemination ▾

Environmental ▾

Education ▾

Alternatives ▾

Program ID & Referral ▾

- All data collected is utilized by DAODAS for the SABG report that is due in December each year (reporting dates are generally two calendar years back). Prevention forms and finance tables. (Show reports from WEBBGAS)
- Data is utilized and further analysis is provided by PIRE for the SC Prevention Outcomes Report. Highlights of the report are provided to the field at the May Prevention Quarterly Meeting for the previous fiscal year. (Reports published on SC Documents website: <https://ncweb.pire.org/>)
- Encourage local providers to utilize data in local planning efforts each year with the County plan and BG applications.

- **Information Dissemination**

- Speaking Engagements**

**Ones highlighted in red require demographics

- Health Fairs and Other Health Promotion **

- Social Media Postings- requires number of views/impressions

- Media Campaigns- requires number of views/impressions

- Radio and TV Public Service Announcements- requires number of views/impressions

- Town Hall Meetings **

- AET Casual Contacts **

- Brochures, Factsheets, Newsletters, Handouts- requires number

- MADD Power of Parents **

- MADD Power of Youth **

- Clearinghouse/Information Resource Centers **

- **Community-Based Processes**

**Ones highlighted in red
require demographics

- Multi-Agency Coordination/Collaboration/Coalition Meetings**
- Youth Boards/Coalitions Meetings **
- Community and Volunteer Training/Technical Assistance **
- Systematic Planning- require staff hours
- Needs Assessment- require staff hours
- Accessing Funding/Grant writing- require staff hours
- Recognition Activities **
- **Education**
- Educational Services for Youth
- Education Services for Adults
- Parenting and Family Management

- **Alternatives (all require demographics)**
- Alcohol and Drug Free Social & Recreational Events
- Team Building Activities/Ropes Courses

- **Program ID & Referral (all require demographics)**
- Tobacco Education Program
- Tobacco Cessation Programs
- Diversion Programs
- Employee Assistance Programs
- Student Assistance Programs

- **Environmental –**

- Compliance Check

- Merchant Education

- Synar Study

- Prescription Drug Deactivation Events

- Prescription Drug Drop Boxes

- Prescription Drug Lock Boxes (Storage)

- Prescription Drug Take Back Events

- Controlled Party Dispersals

- Public Safety Checkpoints

- Public Safety Saturation Patrols

- Promoting The Establishment Or Review Of Alcohol, Tobacco And Drug Use Policies In Schools/Workplace

Shoulder Tap Operations

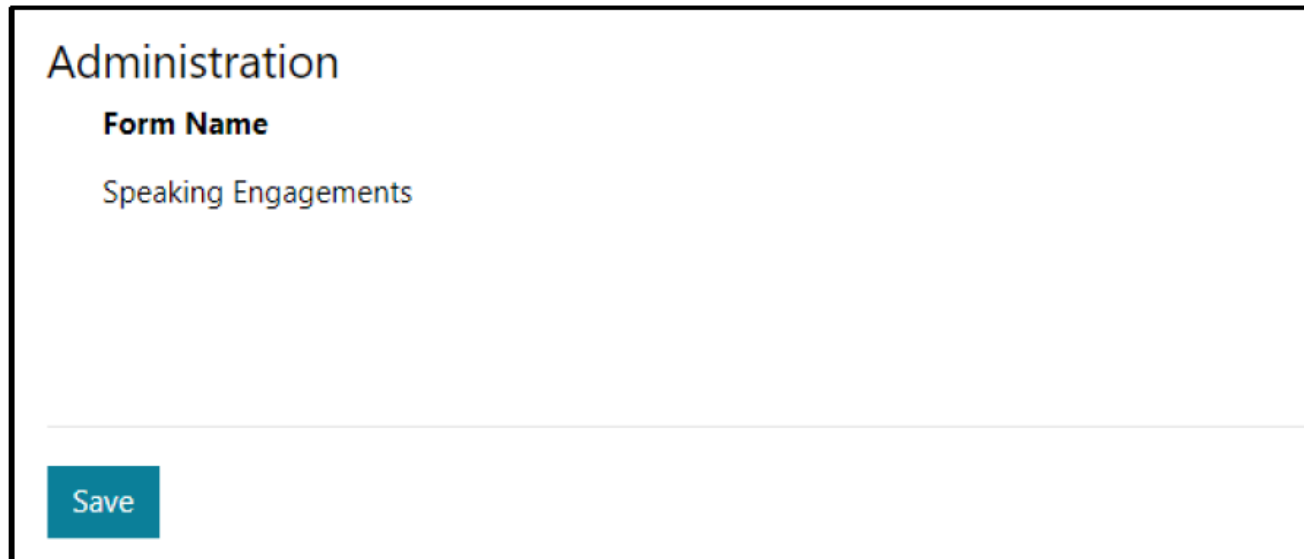
Public Policy Efforts

Bar Checks/Fake Id Sweeps

- **Form Submission Statuses**

- The Save button at the bottom of the form has three (3) functions. You must click save to open up the other areas of the form that must be completed such as time and demographics.

1. Clicking Save the first time enables sub-forms to display, such as Staff Members and Volunteers (for all forms) and a Demographics sub-form (for Educational forms).



Administration

Form Name

Speaking Engagements

Save

Instructions: Click the Save button at the bottom of the form to enable Staff Members and Volunteers.

Staff Members and Volunteers

Total Duration Hours (Direct and Indirect Time)

—

Total Duration Minutes (Direct and Indirect Time)

—

Administration

Form Name

Alcohol and Drug Free Social & Recreational Events

Save



- **Staff Members and Volunteers**

- Each form contains a section for indicating the Staff Members and Volunteers that contributed to the event or activity. This section is comprised of a sub-form, which is enabled upon clicking the Save button at the bottom of the form.
- Clicking the Create button for Staff Members displays the sub-form. Only one member can be added at a time. Select the member, and then click Select.
- Enter the Direct and Indirect time and click Save. The Total Hours and Total Minutes are automatically calculated.
- ***NOTE: If Hours are entered for Direct or for Indirect, then the related Minutes field must be completed, and vice versa. Entering '0' is an acceptable value.***
- Clicking Save records the staff member on the form.
- Click Create again to add the next staff member, if applicable.

- The Volunteers sub-form works similar to the Staff Members sub-form. Clicking the Create button opens the sub-form. Use the Volunteer Type field to indicate the type of volunteer that contributed to the event or activity.
- The Volunteer ID is used to indicate the unique identifier used by the volunteer. While optional for submission, it is recommended that the identifier be entered when Volunteer Type = Volunteer ID.
- Use the Direct and/or Indirect time entry fields to record the volunteer's time.
- Clicking Save records the volunteer on the form. Click Create again to add the next volunteer, if applicable.

NOTE: Attempting to save a submission without adding at least one Staff Member or one Volunteer renders an error message.

When the form is in draft status, it can be reviewed at the local level for any errors. A form can stay in draft until the service is rendered-therefore indirect time can be entered “real time” before a service is completed. DAODAS will have the ability to see all forms-those in draft and submitted.

Clicking Save a second time without checking the ‘confirm’ checkbox saves the form in a Draft status. The form can be opened from the My Forms page to make changes.

Administration

Form Name

Speaking Engagements

I confirm the information submitted is complete.

Save

When form has been reviewed at the local level and is ready for submission to DAODAS, click confirm. This is final step in process. Once a form has been **submitted**, the data will populate the corresponding performance measure will in GrantVantage.

Clicking Save with the confirm statement checked sets the form to a Submitted status. A form cannot be altered after it has been submitted. To make modifications to a submitted form, contact the DAODAS Prevention team.

Administration

Form Name

Speaking Engagements

I confirm the information submitted is complete.

Save

- The Educational forms also contain a Demographics section as a sub-form. This form is enabled the first time the Educational form is saved.
- Clicking Create opens the sub-form for recording the demographics specific to a Group/Session Date. The Headcount serves as the point of validation for demographic counts per session. If the counts for each demographic do not equal the Headcount, an error message is displayed.
- Clicking Save on the demographic sub-form records the session details on the primary form. Click Create to add another session.
- Total Number Served field on the Educational form is used to indicate the number of participants in the session with the highest headcount.

My Forms

- The My Forms page displays a list of forms initiated or submitted by the authenticated user. By default, the form submissions are sorted by Submitted Date in descending order. Clicking on a column name changes the list sort order in ascending order based on the values in *that* column. Clicking the column name again sorts the list in descending order.
- The Submitted Date is the primary attribute (hyperlink) for each submission. Clicking on the date/time opens the form in its last saved state.
- **Forms with a Submitted Status of Draft will open in Edit mode and can be updated prior to submission.**
- **Forms with a Submitted Status of Submitted will open in Read Only mode.**
- ***NOTE: To delete a submitted form, contact the DAODAS Prevention team and GMS Support. Submitted forms cannot be edited. DAODAS will have to delete the form and the information must be re-entered in order to capture the data accurately. Please check that all fields are complete, all staff/volunteer time is entered and that the goal, objective/performance measure align with the type of strategy/form selected prior to submitting the form.***

Data Entry Tips:

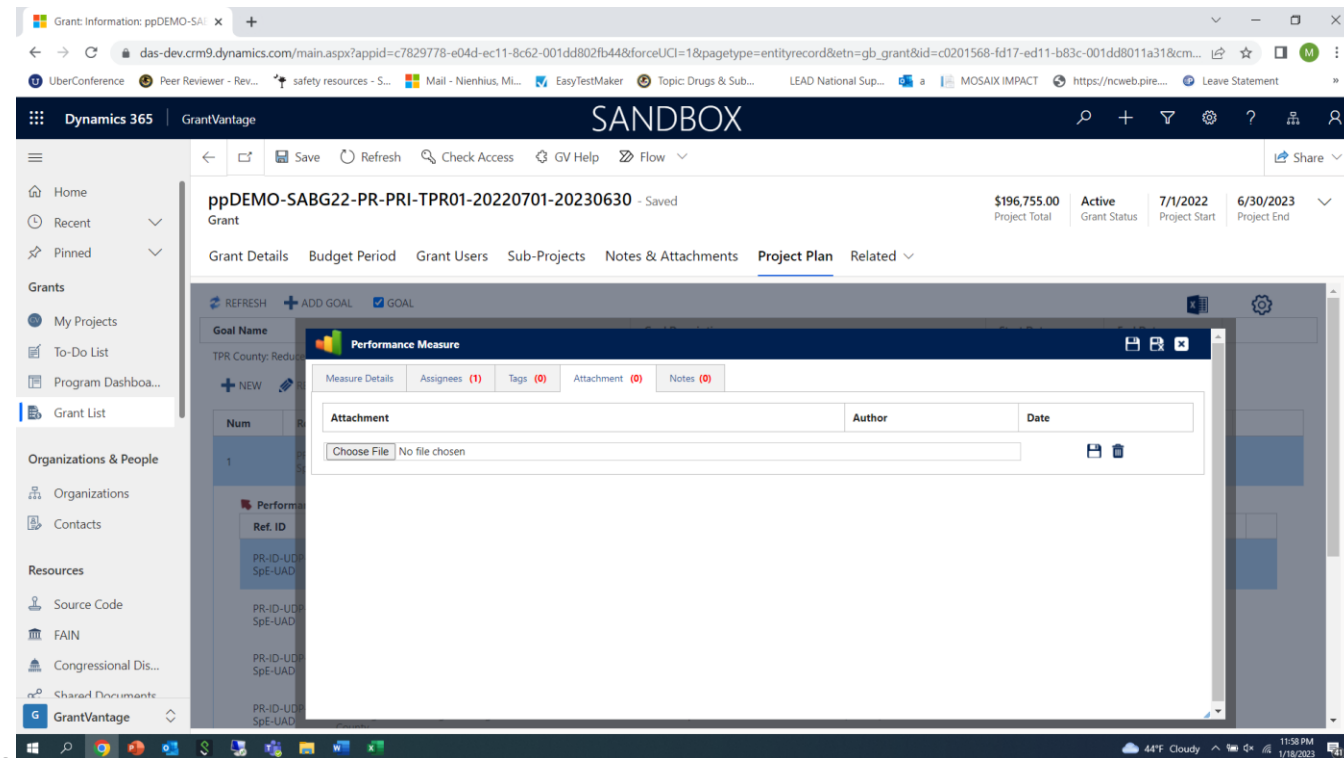
- Planning time (indirect time) for all staff should be entered for the service under the applicable performance measure using the prevention data portal forms. The form should be saved as a draft and planning time added **each month with a note in the description box** indicating the month and the total number of planning hours entered for that month.
- ***Example: Health Fair is set for a future date three months out (event in April 2024). If planning begins today, form should be opened with event date recorded as April 15th. All indirect time (planning time for staff and volunteers) should be entered as it occurs in a service form for the Health Fair. At that time, the form should move from draft status to submitted. Indirect time for February, March and April should be entered into the form each month with a note included in the description box- for example. Planning time for health fair 6 hours February; planning time 4 hours March and planning time 5 hours April. The form should be updated and saved as a draft until the event occurs and all final data is entered. Once event occurs on April 15, the remaining data can be entered (direct hours, demographics, counts, etc.) and the form can be saved and submitted once complete.***
- If planning time is accrued for a service/activity that **does not have** a current goal/objective or performance measure under the project being funded, that is the only time it should be recorded and submitted on the administrative time monthly Excel spreadsheet and uploaded into GMS under the Admin Time/Planning time goal. Primarily the Excel spreadsheet is **only used to record administrative time** accrued monthly.

Single click on the “attachment” tab to bring up the screen to add the “Monthly Administrative Time” Excel spreadsheet file that is saved on your computer

The screenshot displays the Dynamics 365 GrantVantage interface. The main window shows a record for 'ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630 - Saved' with a project total of \$196,755.00 and an active status. The 'Project Plan' tab is selected, and a 'Performance Measure' dialog box is open. This dialog has tabs for 'Measure Details', 'Assignees (1)', 'Tags (0)', 'Attachment (0)', and 'Notes (0)'. The 'Attachment' tab is active, showing a table with columns for 'Attachment', 'Author', and 'Date'. Below the table is a '+ ADD ATTACHMENT' button. The background interface includes a left-hand navigation pane with options like 'Home', 'Recent', 'Pinned', 'Grants', 'My Projects', 'To-Do List', 'Program Dashboa...', 'Grant List', 'Organizations & People', 'Organizations', 'Contacts', 'Resources', 'Source Code', 'FAIN', 'Congressional Dis...', 'Shared Documents', and 'GrantVantage'. The top navigation bar includes 'Dynamics 365', 'GrantVantage', and 'SANDBOX'. The bottom of the screen shows a Windows taskbar with the date 5/1/2019 and system tray information including 44°F Cloudy, 11:57 PM, and 1/18/2023.

Steps to attach a file to PM:

- Single click on “+ADD ATTACHMENT”
- Single click on “Choose File”-this will bring up a menu from your computer-find the file that you want to upload that is saved on your computer desktop or files
 - ***Make sure to label the Excel spreadsheet by the month. For example, “Administrative Time Jan 23”***
- Click on the file you want to attach and then click open-you should now see that file populate beside the “choose file” in the box-then click on the “disk” icon to save file.
- To save the entire record, click on the “disk” at the top in the blue area to save. The “disk” with the “x” will save and close the file.
- If you need to make a change to the file at anytime, you can go in and click the trashcan icon to delete the file and re-attach a new file.
- Add a new file each month-you should be able to see multiple files over time.



Data Entry Tips:

Several services target multiple objectives. If we are targeting two different objectives, do we have to make two entries for that service?

- The service information should go under the appropriate objective. For example, if you conduct a health fair for 3 substances, you can choose to place the information in the data portal in 3 different objectives (dividing the total number served by 3 and entering a third of the information into each objective) or you can enter one health fair in the alcohol objective this service implementation and for the next one, enter it into a different objective.

For example: If there were 300 people in attendance at the health fair, you could place 100 under the underage alcohol health fair objective, 100 under the tobacco health fair goal and 100 under the prescription drug objective **OR** you can enter all three hundred people under the alcohol health fair objective for this service event and then enter the next health fair that you conduct under tobacco, etc. ***Ultimately the numbers will all be counted as individuals you served during the year, so we do not want to double or triple report data.*** DAODAS will explore the ability to select multiple objective in the future.

- Data Entry Tips:

- Please complete **all fields** with accurate information. For events with larger numbers-please estimate the demographics-do not use “unknown” as default.
- Open a form as soon as you begin preparing for/working on the planning for the event. A form can remain in draft as long as needed to complete the activity.
- Add notes in the description to highlight indirect time for each month. This can be a summary of all time for all staff working on the event. For example, you are planning for an alternative event that will be held in April and you begin working on the planning for the event in January. The form can be opened in January and indirect time for all staff/volunteers captured each month leading up the event if it is saved as a draft. Once the event occurs in April and all final information is entered (direct’/indirect time, demographics for people served, etc.) then the form should be submitted.
- Only one form should be completed and submitted for each service/event. If there are multiple staff members and/or volunteers working on an event, please do not submit more than one form. All time should correspond to one form for the event.



Data Reporting: A Closer Look at pulling data from Prevention Data Portal for Monthly Reimbursement Reporting

DAODAS Prevention Team

November 2, 2023

Data Reporting Standards From Prevention Standards Manual:

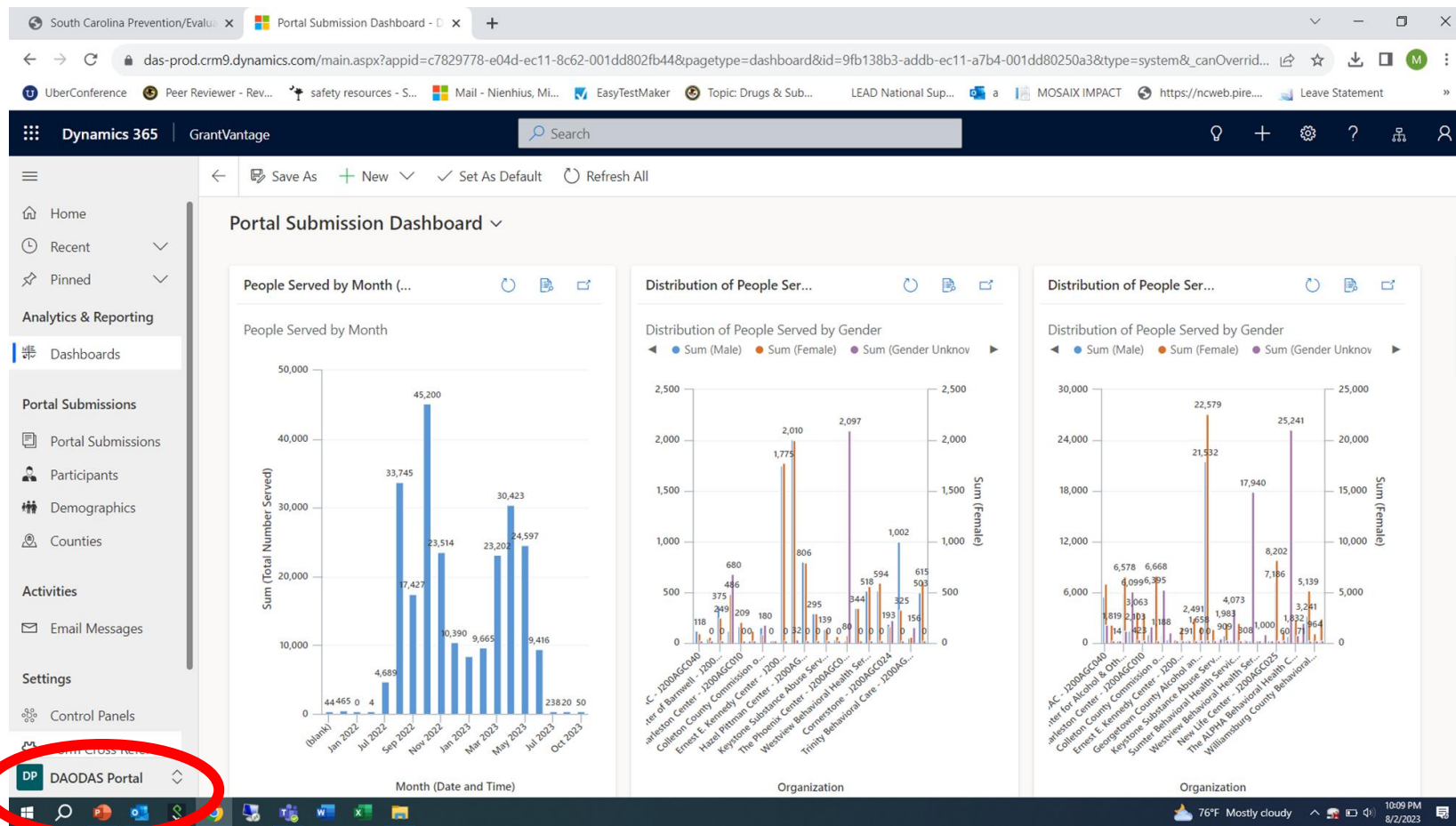
- Minimum standards for accuracy of monthly data entered into the web-based reporting system are as follows:
- *a)* correct application of service categories (direct vs. indirect) and populations served;
- *b)* required monthly documentation of service hours for any organizational member or volunteer who is providing prevention services;
- *c)* Demographics of people served in prevention services as required for federal reporting;
- *d)* appropriate documentation of funding and reporting to ensure compliance.
- *****These are just a few highlights from the Manual, please read the entire document and contact DAODAS with any questions.***

- New projects for this fiscal year in GMS: SABG23-PR-ALL-XXX-20230701-20240630
- Please complete all fields (even the ones that are not labeled as required) to ensure that the integrity of the data is high.
- If you have a question related to data forms, please contact prevention@daodas.sc.gov to ensure accurate information is reported.
- If you have questions related to accessing the prevention data portal, please contact gms-support@daodas.sc.gov and cc prevention@daodas.sc.gov

- Reports can be built from GMS and customized to retrieve any data that is entered into the portal.
- Reports can be downloaded into Excel and shared with staff who do not have access to GMS.
- Reports should be used monthly to ensure data accuracy.
- Report views can be saved once built so that you can access them over and over again without having to constantly build new reports.
- Filtering is important as it relates to pulling the data for your county- this can be done in GMS and when the data is pulled out into Excel- "filtering is my friend".

Steps for pulling data from Prevention Data Portal through GMS:

1. Bottom left-hand corner- Click on blue “G-GrantVantage” symbol and change view to “DAODAS Portal (DP)” view



2. On left-hand side, click on "Portal Submission"

The screenshot displays the Dynamics 365 interface for 'GrantVantage'. The left-hand navigation pane is visible, with the 'Portal Submissions' menu item circled in red and a blue arrow pointing to it. The main area shows a table titled 'All Active Portal Submissions' with columns for Submission ID, Grant Name, Objective, Organization, Performance, Funding Source, County of Operation, Date and Time, Contact Name, Submission Date, and Submission Status. The table contains 15 rows of data.

Submission ID	Grant Name	Objective	Organization	Performance	Funding Source	County of Operation	Date and Time	Contact Name	Submission Date	Submission Status
DAS-013864	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...	Jennifer E...	8/2/2023	Submit...
DAS-013863	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...
DAS-013862	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/21/20...	Jennifer F...	8/2/2023	Submit...
DAS-013861	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/21/20...	Jennifer F...	8/2/2023	Submit...
DAS-013860	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...
DAS-013859	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...
DAS-013858	SABG22-PR-P...	Environm...	The Phoe...	By June 30, 2...		Greenville	8/1/2023 ...	Kaitlin Ma...		Draft
DAS-013857	SABG22-PR-P...	Communi...	Cherokee...	By June 30, 2...		Cherokee	8/2/2023 ...	Tierney R...		Draft
DAS-013856	SABG22-PR-P...	Environm...	The Phoe...	By June 30, 2...		Greenville	8/1/2023 ...	Kaitlin Ma...		Draft
DAS-013855	SABG22-PR-P...	Informati...	The Phoe...	By June 30, 2...		Greenville	8/1/2023 ...	Kaitlin Ma...		Draft
DAS-013854	SABG22-PR-P...	Problem I...	Georgeto...	Measure Desc...		Georgetown	7/17/202...	Richard S...	8/2/2023	Submit...
DAS-013853	SABG22-PR-P...	Education...	Georgeto...	By June 30, 2...		Georgetown		Richard S...		Draft

3. On top right, click on “Edit Columns” to bring up a menu on right side.

The screenshot shows the Dynamics 365 GrantVantage interface. The main area displays a table of 'All Active Portal Submissions'. The 'Edit columns' button is circled in red, and a blue arrow points to it. The 'Edit columns: Portal Submissions' menu is open on the right, showing a list of columns to be added or removed. The 'Add columns' button is also circled in red.

County of Op...	Date and ...	Contact ...	Submitt...	Submissi...	Form Name	Intervention Type	Total Duration Hou...
Darlington	11/22/20...	Jennifer F...		Draft	Compliance Check	UIP	
Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	Compliance Check	UIP	0
Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	Compliance Check	UIP	0
Darlington	11/21/20...	Jennifer F...	8/2/2023	Submit...	Compliance Check	UIP	0
Darlington	11/21/20...	Jennifer F...	8/2/2023	Submit...	Compliance Check	UIP	0
Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	Compliance Check	UIP	0
Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	Compliance Check	UIP	4
Greenville	8/1/2023 ...	Kaitlin M...		Draft	Prescription Drug...	UIP	0
Cherokee	8/2/2023 ...	Tierney R...		Draft	Youth Boards/Coa...	UDP	6
Greenville	8/1/2023 ...	Kaitlin M...		Draft	Prescription Drug...	UIP	3
Greenville	8/1/2023 ...	Kaitlin M...		Draft	Health Fairs and ...	UDP	6

4. Click “+ Add Columns” to add the following columns to the report:

- Form Name
- Intervention Type
- Total Duration Hours
- Total Duration Minutes
- Strategy

You can add the columns by typing the heading in the search bar (Form Name) and then select the heading and click “**CLOSE**”.

This will then take you back to the list.

Repeat the steps to continue to add each one until you have all of the additional columns added to the list then hit “**APPLY**” to save.

Browser tabs: South Carolina Prevention/Evalu... | Portal Submissions All Active Port... | +

Address bar: das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entitylist&etn=das_portalsubmissions&viewid=03a34cff-a9a6-4cc5-be43-d6679a612e...

Taskbar: UberConference | Peer Reviewer - Rev... | safety resources - S... | Mail - Nienhius, Mi... | EasyTestMaker | Topic: Drugs & Sub... | LEAD National Sup... | a | MOSAIX IMPACT | https://ncweb.pire... | Leave Statement

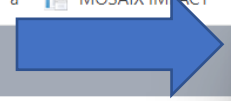
Dynamics 365 | GrantVantage

Search

All Active Portal Submissions

Submission ...	Grant Name	Objective	Organizat...	Performance ...	Funding Source	County of Ope...	Date and ...
DAS-013868	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013867	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013866	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013865	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013864	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013863	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013862	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/21/20...
DAS-013861	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/21/20...
DAS-013860	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013859	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013858	SABG22-PR-P...	Environm...	The Phoe...	By June 30, 2...		Greenville	8/1/2023 ...
DAS-013857	SABG22-PR-P...	Communi...	Cherokee...	By June 30, 2...		Cherokee	8/2/2023 ...

1 - 50 of 5000+



Add columns

Portal Submissions | Related

Form | All

- Form ID
- Form Name
- Form Name - Do not use
- Performance Measure Total
- Sources of Party Location Information
- Update Performance Measure

Select your choice then hit "Close"



5. Click “blue apply” button and this will return you to the Portal Submission view-now it will have the additional columns you added in visible as you scroll to the right.

The screenshot shows the Dynamics 365 GrantVantage interface. The main view is a table titled "All Active Portal Submissions" with columns for Submission ID, Grant Name, Objective, Organization, Performance, Funding Source, County of Operation, and Date. The table contains 15 rows of data. On the right side, an "Edit columns" panel is open, showing a list of columns that can be added to the table. A blue arrow points to the "Apply" button at the bottom of this panel, which is circled in red. The "Apply" button is highlighted in blue, and the "Cancel" button is in white.

Submission ID	Grant Name	Objective	Organization	Performance	Funding Source	County of Operation	Date
DAS-013868	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013867	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013866	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013865	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013864	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013863	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013862	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/21/20...
DAS-013861	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/21/20...
DAS-013860	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013859	SABG22-PR-P...	Environm...	Rubicon F...	Rubicon Inc w...	General Pr...	Darlington	11/22/20...
DAS-013858	SABG22-PR-P...	Environm...	The Phoe...	By June 30, 2...		Greenville	8/1/2023 ...
DAS-013857	SABG22-PR-P...	Communi...	Cherokee...	By June 30, 2...		Cherokee	8/2/2023 ...

6. Click on arrow beside “Grant Name” then “Filter By” – Equals and type in “SABG23” to bring up a list to choose from for your county’s grant. Click “Apply” once you have selected your agency’s grant to view the data entered under that project.

The screenshot shows the Dynamics 365 GrantVantage interface. A table titled "Portal submission" is displayed with columns: Submissi..., Grant Name, Objective, Organiz..., Performanc..., Funding So..., County of O..., Date an..., Contact..., Submitt..., and Submissi... Str. A blue arrow points to the dropdown arrow next to the "Grant Name" column header. The dropdown menu is open, showing "Filter By" with "Equals" selected. Below the dropdown, a search box contains the text "SABG23-PR-ALL-AIK-202...". There are "Apply" and "Clear" buttons at the bottom of the filter menu. The table contains several rows of data, including grant IDs like DAS-017756, DAS-017755, DAS-017754, DAS-017753, DAS-017752, DAS-017751, DAS-017750, DAS-017749, DAS-017748, DAS-017747, and DAS-017746, with various details for each.

Submissi...	Grant Name	Objective	Organiz...	Performanc...	Funding So...	County of O...	Date an...	Contact...	Submitt...	Submissi...	Str
DAS-017756			Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017755			Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017754			Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017753			Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017752			Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017751	SABG22-PR-P...	Environm...	Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017750	SABG22-PR-P...	Environm...	Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017749	SABG23-PR-A...	LEX-Com...	LRADAC -...	By June 30, 2...		Lexington	10/13/20...	Ashley Bo...	11/1/2023	Submit...	
DAS-017748	SABG23-PR-A...	RICH-Info...	LRADAC -...	Total number ...		Richland	10/12/20...	Ashley Bo...	11/1/2023	Submit...	
DAS-017747	SABG22-PR-P...	Environm...	Keystone ...	By June 30, 2...	General Pr...	York	1/25/202...	Tara Grant	11/1/2023	Submit...	
DAS-017746	SABG23-PR-A...	Communi...	Williamsb...	Total number ...		Williamsburg	10/19/20...	Caroline ...		Draft	

7. Click on arrow beside “County of Operation” then “Filter By” to bring a drop down menu where you can type in all of the counties you want to view (one or more). This will filter the view to only show the data for the counties you want to view. Click “Apply” once you have selected the county or counties you want to view.

The screenshot shows the Dynamics 365 GrantVantage interface. The main area displays a table titled "All Active Portal Submissions*". A blue arrow points to the "County of Op..." column header, which has a dropdown menu open. The dropdown menu includes options for "Sort A to Z", "Sort Z to A", and "Filter by". The "Filter by" option is selected, and a search box is visible next to it. The table contains several rows of submission data, including submission IDs, grant names, objectives, organizations, performance metrics, funding sources, county names (e.g., Darlington, Greenville), dates, contact names, and submission statuses.

Submission...	Grant Name	Objective	Organizat...	Performance ...	Funding Source	County of Op...	Date and ...	Contact ...	Submitte...	Submissi...	For
DAS-013868	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...		20...	Jennifer F...	8/2/2023	Submit...	
DAS-013867	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...		20...	Jennifer F...	8/2/2023	Submit...	
DAS-013866	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013865	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013864	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013863	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013862	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/21/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013861	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/21/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013860	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013859	SABG22-PR-P...	Environ...	Rubicon F...	Rubicon Inc ...	General Pr...	Darlington	11/22/20...	Jennifer F...	8/2/2023	Submit...	
DAS-013858	SABG22-PR-P...	Environ...	The Phoe...	By June 30, 2...		Greenville	8/1/2023 ...	Kaitlin M...		Draft	

8. Click on arrow beside “Date and Time” then select “Newer to older”. This will filter the service dates on the forms from the most recent to the oldest.

The screenshot shows the Dynamics 365 interface for 'Portal submission checks*'. A table lists various submission records. The 'Date and Time' column has a dropdown menu open, showing options: 'Sort older to newer', 'Sort newer to older' (which is selected), and 'Filter by'. A blue arrow points to the dropdown arrow in the table header.

Form Name	Strategy	Submiss...	Submitt...	Contact...	Date ...	County of...	Funding So...	Performanc...	Organiz...	Objectiv...	nt Na...
Speaking	Information Di...	Draft				Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft				Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			11/1/202...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			11/1/202...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			10/31/20...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			10/31/20...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			10/31/20...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			10/31/20...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			10/31/20...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...
Speaking	Information Di...	Draft			10/30/20...	Aiken		Total number ...	Aiken Ce...	Informati...	IG23-PR-A...

9. Click on arrow beside “Strategy” then a “Filter By” box will open up. When you click on the arrow, it will bring up the 6 strategies and you can filter by the strategy you want to see. Once you make a selection, click apply and the data will filter to bring up the forms related to that strategy from newest to oldest date-both draft and submitted.

The screenshot shows the Dynamics 365 GrantVantage interface. A table titled "Portal submission checks*" is displayed with columns for Objective, Organization, Performance, Funding Source, County, Date, Contact, Submission Status, and Strategy. A red circle highlights the "Strategy" column header, which has a dropdown arrow. A "Filter By" menu is open, showing a search box, a dropdown menu set to "Equals", and a list of strategy options: Information Dissemination, Education, Alternatives, Program ID & Referral, Community-Based Processes, and Environmental. A blue arrow points to the dropdown arrow on the "Strategy" column header.

Objective	Organiz...	Performanc...	Funding So...	County of...	Date ...	Contact...	Submitt...	Submiss...	Strategy	Form Name
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/30/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...

Portal Submissions Portal submi x +

das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entitylist&etn=das_portalsubmissions&viewid=99c576b9-6b5d-ee11-be6e-001dd80874e6&...

UberConference Peer Reviewer - Rev... safety resources - S... Mail - Nienhius, Mi... EasyTestMaker Topic: Drugs & Sub... LEAD National Sup... MOSAIX IMPACT https://ncweb.pire... Leave Statement

Dynamics 365 | GrantVantage

Search

Try the new look

Show Chart + New Delete Refresh Visualize this view Email a Link Flow AI Builder Run Report Share

Portal submission checks* Edit columns Edit filters Filter by keyword

Objective	Organiz...	Performanc...	Funding So...	County of...	Date ...	Contact...	Submitt...	Submiss...	Strategy	Form Name
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	11/1/202...	Tonya Av...		Draft		
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/31/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...
Informati...	Aiken Ce...	Total number ...		Aiken	10/30/20...	Tonya Av...		Draft	Information Di...	Speaking Engage...

Filter By

Equals

Information Dissemination

Apply



Windows taskbar with icons for Start, Search, Edge, Word, Excel, and system tray showing 10:37 PM 11/11/2023, 36°F Clear.



- Planning time for the month should be entered in a form **related to the strategy even if the strategy service date will be in another month.**
- For example, if a speaking engagement will be conducted on December 1 and the staff begins planning for the event in November, **go ahead and open the form and enter planning time in the form as you are planning.**
- A note should be placed in the “description” section of the form with a brief explanation of the planning time attributed to the service.
- Objective should line up with strategy. For example, you would not have a problem identification and referral objective with an information dissemination strategy and speaking engagement form.

Portal Submissions: CRM Submis x +

das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entityrecord&etn=das_portalsubmissions&id=d42262fa-b462-ee11-a81c-001dd80127b3

UberConference Peer Reviewer - Rev... safety resources - S... Mail - Nienhius, Mi... EasyTestMaker Topic: Drugs & Sub... LEAD National Sup... MOSAIX IMPACT https://ncweb.pire... Leave Statement

Dynamics 365 GrantVantage Search Try the new look

Save Save & Close New Deactivate Delete Refresh Check Access Assign Flow Share

DAS-016214 - Saved Portal Submissions **DAS-016214** Submission ID **10/4/2023 8:53 AM** Created On **SYSTEM** Owner

General Service Details & Demographics Social Media Education Environmental Notes & Attachments Related

Strategy	Information Dissemination
Form Name	Speaking Engagements
Organization	* Shoreline Behavioral Health Services - J200AGC026
Grant Name	* SABG23-PR-ALL-HOR-20230701-20240630
Objective	* Information Dissemination-Speaking Engagements -Opioids/Prescription Drugs
Performance Measure	* Total number of citizens reached through speaking engagements providing information on the d...
Description	Planning in August, September October 3 presentation

Submitted By

Contact First Name	Alyson
Contact Last Name	Teberio
Contact Email	ateberio@shorelinebhs.org
Contact Phone	8433658884x254
Contact Mobile Phone	---

Approved By

Approver First Name	---
Approver Last Name	---

10/3/2023 Presentation Type In-Person

DAODAS Portal

36°F Clear 10:47 PM 11/1/2023

- It is through these views that DAODAS can filter the data and compare the service forms entered (both in draft and submitted) to the monthly financial reimbursement request.

The screenshot displays the Dynamics 365 GrantVantage interface. The main view is titled 'SABG23-PR-ALL-HOR-20230701-20240630 - Saved Grant'. The 'Drawdowns & Disbursements' tab is highlighted with a red circle and a yellow star. Below the tab, a 'Drawdown/Reimbursement' window is open, showing a table of transactions. The table has columns for 'Drawdown Detail', 'Transaction Summary (35)', 'Disallowed Transactions(0)', 'Attachments (3)', and 'Payments (1)'. The total amount is 22,401.39. The table is divided into two sections: 'Prevention - AET 5170790000 FEDERAL (14)' and 'Prevention - Primary 5170790000 FEDERAL (21)'. The first section includes transactions 8022, 8024, and 8025. The second section includes transactions 8002, 8004, 8005, 8006, and 8007. A blue rounded rectangle highlights the transaction list table. A blue arrow points to the 'Expand All (35 Transactions)' button. Another blue arrow points to the 'Prevention - Primary 5170790000 FEDERAL (21)' section. The left sidebar shows navigation options like 'Home', 'Recent', 'Pinned', 'Grants', 'My Projects', 'To-Do List', 'Program Dashboa...', 'Grant List', 'Organizations & People', 'Resources', and 'GrantVantage'. The bottom status bar shows the date and time as 10:53 PM on 11/11/2023.

Drawdown Detail	Transaction Summary (35)	Disallowed Transactions(0)	Attachments (3)	Payments (1)
Expand All (35 Transactions) 22,401.39				
Prevention - AET 5170790000 FEDERAL (14)				
8022 Information Dissemination J200_0066 (5)				
8024 Environmental J200_0068 (5)				
8025 Community-Based Process J200_0069 (4)				
Prevention - Primary 5170790000 FEDERAL (21)				
8002 Information Dissemination J200_0060 (5)				
8004 Environmental J200_0062 (4)				
8005 Community-Based Process J200_0063 (3)				
8006 Alternatives J200_0064 (5)				
8007 Problem Identification and Referral J200_0065 (4)				

- Home
- Recent
- Pinned
- Grants
 - My Projects
 - To-Do List
 - Program Dashboa...
 - Grant List
- Organizations & People
 - Organizations
 - Contacts
- Resources
 - Source Code
 - FAIN
 - Congressional Dis...

SABG23-PR-ALL-HOR-20230701-20240630 - Saved **\$244,991.73** **Active** **7/1/2023** **6/30/2024**
Project Total Grant Status Project Start Project End

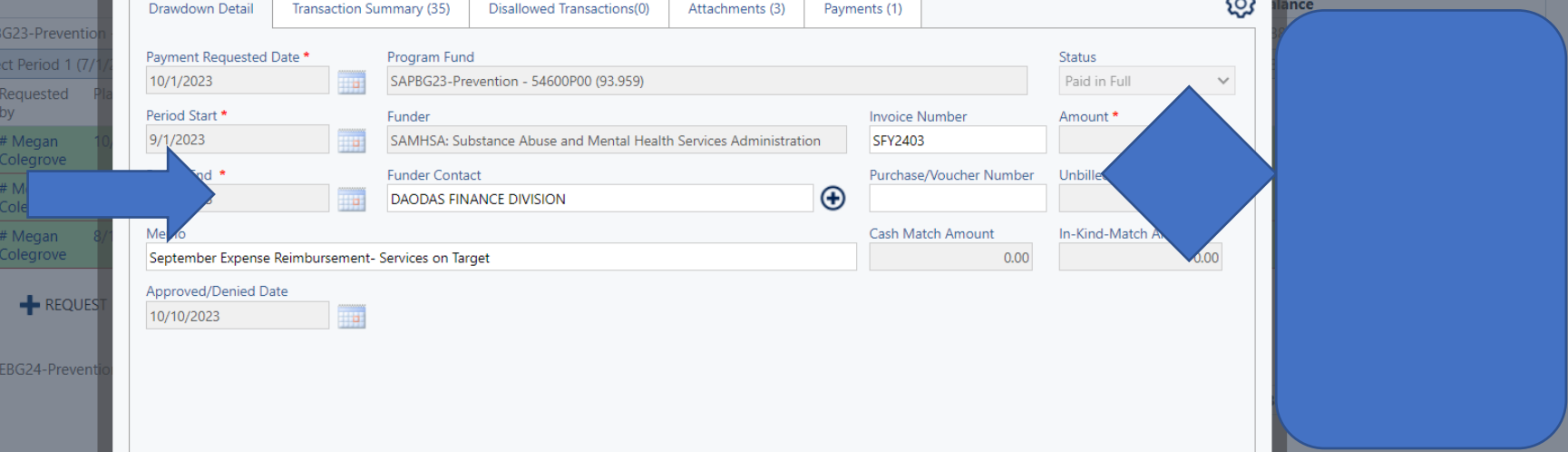
Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Drawdowns & Disbursements Related

Drawdown/Reimbursement

Revenue Source: SAPBG23-Prevention

Transaction Summary (35) | Disallowed Transactions(0) | Attachments (3) | Payments (1)

Payment Requested Date *	Program Fund	Status
10/1/2023	SAPBG23-Prevention - 54600P00 (93.959)	Paid in Full
Period Start *	Funder	Invoice Number
9/1/2023	SAMHSA: Substance Abuse and Mental Health Services Administration	SFY2403
Funder Contact *	Funder Contact	Purchase/Voucher Number
DAODAS FINANCE DIVISION		Unbilled
Memo	Cash Match Amount	In-Kind-Match Amount
September Expense Reimbursement- Services on Target	0.00	0.00
Approved/Denied Date		
10/10/2023		



- In this example, service data (at least one form for each strategy reported) for September would include forms entered into the data portal (either in submitted or draft) status for the following strategies:
 - Information Dissemination
 - Environmental
 - Community- Based Process
 - Alternatives
 - Problem Identification and Referral

The screenshot shows a Dynamics 365 Portal Submissions list. The interface includes a search bar at the top, a left-hand navigation pane, and a table of submission records. Annotations include blue arrows pointing to the search bar, the 'Date' column header, and the 'Strategy' column header. Red circles highlight the 'Date' and 'Strategy' column headers.

Submission ID	Grant Name	Objective	Organization	Performance	Funding Source	County	Date	Contact	Submitted	Submission Status	Strategy
DAS-016214	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	10/3/202...	Alyson Te...		Draft	Informati
DAS-016588	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016587	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016585	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016581	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016582	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016580	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016578	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016577	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016575	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016574	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/10/2023	Submit...	Informati
DAS-016405	SABG23-PR-A...	Informati...	Shoreline...	Total number ...		Horry	9/29/202...	Lee Alston	10/5/2023	Submit...	Informati

The screenshot shows the Dynamics 365 Portal Submissions interface. The left sidebar contains navigation options: Home, Recent, Pinned, Analytics & Reporting, Dashboards, Portal Submissions, Participants, Demographics, Counties, Activities, Email Messages, Settings, Control Panels, and Form Cross Refere... The main content area displays a table titled "Portal submission checks*" with columns: Submission ID, Grant Name, Objective, Organization, Performance, Funding Source, County of..., Date, Contact, Submission Status, and Strategy. The Strategy column is circled in red. A text box on the right explains the filtering process.

Submission ID	Grant Name	Objective	Organization	Performance	Funding Source	County of...	Date	Contact	Submission Status	Strategy	
DAS-014053	SABG23-PR-A...	Alternativ...	Shoreline...	Total number ...		Horry	9/11/202...	Alyson Te...	9/13/2023	Submit...	Alternative:
DAS-014055	SABG23-PR-A...	Alternativ...	Shoreline...	Total number ...		Horry	7/18/202...	Alyson Te...		Draft	Alternative:

1 - 2 of 2

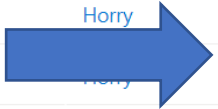
Page 1

36°F Clear 11:03 PM 11/1/2023

Filter by each strategy you have reported for. You will need at least (1) form to be reimbursed.

Portal submission checks*

Submission ...	Grant Na...	Objective	Organiz...	Performanc...	Funding So...	County of...	Date ...	Contact...	Submitt...	Submiss...	Strategy
AS-017291	SABG23-PR-A...	Problem I...	Shoreline...	Total number ...		Horry	10/23/20...	Alyson Te...	10/25/2023	Submit...	Program ID 8
AS-016974	SABG23-PR-A...	Problem I...	Shoreline...	Total number ...		Horry	10/12/20...	Alyson Te...	10/25/2023	Submit...	Program ID 8
AS-015559	SABG23-PR-A...	Problem I...	Shoreline...	Total number ...		Horry	9/18/202...	Alyson Te...		Draft	Program ID 8
AS-015176	SABG23-PR-A...	Problem I...	Shoreline...	Total number ...		Horry	9/13/202...	Alyson Te...	10/25/2023	Submit...	Program ID 8
AS-014057	SABG23-PR-A...	Problem I...	Shoreline...	Total number ...		Horry	9/6/2023 ...	Alyson Te...	9/7/2023	Submit...	Program ID 8



Dynamics 365 | GrantVantage

Portal submission checks*

Submission ID	Grant Name	Objective	Organiz...	Performanc...	Funding So...	County of...	Date ...	Contact...	Submitt...	Submiss...	Strategy
16384	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	9/20/202...	Lee Alston	10/5/2023	Submit...	Community-Ba...
16386	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	9/20/202...	Lee Alston	10/5/2023	Submit...	Community-Ba...
16389	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	9/20/202...	Lee Alston	10/5/2023	Submit...	Community-Ba...
14410	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	8/23/202...	Lee Alston	9/7/2023	Submit...	Community-Ba...
15120	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	8/16/202...	Lee Alston		Draft	Community-Ba...
15214	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	8/16/202...	Lee Alston	9/13/2023	Submit...	Community-Ba...
15221	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	8/16/202...	Lee Alston	9/13/2023	Submit...	Community-Ba...
15233	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	8/16/202...	Lee Alston	9/13/2023	Submit...	Community-Ba...
14439	SABG23-PR-A...	Communi...	Shoreline...	Total number ...		Horry	7/25/202...	Lee Alston		Draft	Community-Ba...

1 - 9 of 9

Portal Submissions Portal submi | Grant: Information: SABG23-PR- | +

das-prod.crm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&pagetype=entitylist&etn=das_portal submissions&viewid=99c576b9-6b5d-ee11-be6e-001dd80874e6&...

Dynamics 365 | GrantVantage

Search

Try the new look

Portal submission

Edit columns Edit filters Filter by keyword

Grant Na...	Objective	Organiz...	Performanc...	Funding So...	County of...	Date ...	Contact...	Submitt...	Submiss...	Strategy	
6813	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental	
6800	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6798	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6797	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6795	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6793	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6792	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6790	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6789	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6788	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental
6811	SABG23-PR-A...	Environm...	Shoreline...	Total number ...	General Pr...	Horry	9/13/202...	Lee Alston	10/12/2023	Submit...	Environmental

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36°F Clear 11:08 PM 11/1/2023

- The data submitted aligns with the request- DAODAS program staff changes the status from “requested” to “ approved” and notes “services on target”. At that point, DAODAS finance team will process the reimbursement request for payment. The status will stay in “approved” until the payment is made to the agency. At that time the status will change to “paid in full”.

The screenshot displays the Dynamics 365 GrantVantage interface for a grant record: **SABG23-PR-ALL-HOR-20230701-20240630**. The grant is in an **Active** state, with a project start date of **7/1/2023** and an end date of **6/30/2024**. The **Drawdowns & Disbursements** section is active, showing a table of transactions. A blue circle highlights the **Status** column, and a blue arrow points to the **Paid in Full** status of a row.

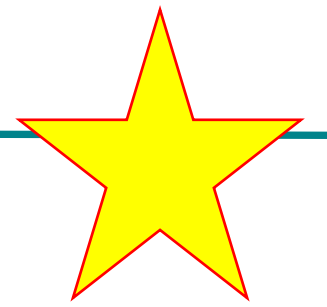
Revenue Source	Revenue Source Type	Method	Match	Planned	Requested	Total Paid	Unpaid Balance	Total Spent \$	Total Spent %
Project Period 1 (7/1/2023 - 6/30/2024)									
Requested by									
# Megan Colegrove	10/1/2023	10/1/2023	10/10/2023	10/31/2023	Paid in Full	SFY2403	2023.10.03		
# Megan Colegrove	9/1/2023	9/1/2023	9/20/2023	10/12/2023	Paid in Full	SFY2402	2023.09.13		
# Megan Colegrove	8/1/2023	8/1/2023	10/3/2023	10/12/2023	Paid in Full	SFY2401	2023.08.17		
+ REQUEST DRAWDOWN / REIMBURSEMENT									
STATEBG24-Prevention	Fund	Reimbursement		1,833.00	1,833.00	1,833.00	1,833.00	0.00	100.00%

If data for any service area is missing, the “request” will be returned to “planned” status and a note will be placed in the memo related to the areas that data is missing.

The screenshot displays the Dynamics 365 GrantVantage interface. The main window shows a 'Grant' record for 'SABG23-PR-ALL-CHE-20230701-20240630'. The 'Drawdowns & Disbursements' section is active, showing a 'Drawdown/Reimbursement' form. The form includes the following fields:

- Payment Requested Date: 10/9/2023
- Program Fund: SAPBG23-Prevention - 54600P00 (93.959)
- Status: Planned
- Period Start: 9/1/2023
- Funder: SAMHSA: Substance Abuse and Mental Health Services Administration
- Invoice Number: FY 24 092023
- Period End: 9/30/2023
- Funder Contact: DAODAS FINANCE DIVISION
- Memo: Sept reimbursement request-missing data for info. diss. envir and alt
- Cash Match Amount: 0.00

Blue arrows highlight the 'Planned' status dropdown, the memo field, and the 'Generate Request' button. A blue diamond is overlaid on the 'Amount' field.



You can also download the data to an excel file.

Click **“Export to Excel”** at the top right of the **Portal Submissions** page.

The file will download into your “downloads” folder.

Once the data is in Excel, you can work with the data and filter the information in many different ways. The Excel report can be shared with agency leadership as needed, finance to demonstrate services provided (or forms that are in draft) for monthly reimbursement requests, etc.

You can also just apply various filters and remove them as needed if you are only needing a “quick” view of information.

The screenshot shows the Dynamics 365 interface for 'GrantVantage'. The main view is 'All Active Portal Submissions*'. A table lists various submissions with columns for Submission ID, Grant Name, Objective, Organization, Performance, Funding Source, County, and Date. A context menu is open over the table, with 'Export to Excel' highlighted by a red circle and a blue arrow. A large blue arrow points to the settings gear icon in the top navigation bar.

Submission ID	Grant Name	Objective	Organizat...	Performance ...	Funding Source	County of ...	Date	Submitted By	Status
DAS-012131	SABG22-PR-P...	Communi...	Ernest E. ...	By June 30, 2...		Berkeley	6/29/2...		
DAS-011758	SABG22-PR-P...	Communi...	Ernest E. ...	By June 30, B...		Berkeley	6/21/202...	Ronnie W...	7/6/2023 Submit...
DAS-010718	SABG22-PR-A...	Environm...	Ernest E. ...	By June 30, 2...		Berkeley	6/19/202...	Brian Hor...	New
DAS-010719	SABG22-PR-A...	Environm...	Ernest E. ...	By June 30, 2...		Berkeley	6/19/202...	Brian Hor...	New
DAS-010720	SABG22-PR-A...	Environm...	Ernest E. ...	By June 30, 2...		Berkeley	6/17/202...	Brian Hor...	New
DAS-011984	SABG22-PR-P...	Communi...	Ernest E. ...	By June 30, 2...		Berkeley	6/16/202...	Wehme H...	7/11/2023 Submit...
DAS-010694	SABG22-PR-P...	Informati...	Ernest E. ...	By June 30, 2...		Berkeley	6/16/202...	Ronnie W...	7/5/2023 Submit...
DAS-011315	SABG22-PR-P...	Informati...	Ernest E. ...	By June 30, 2...		Berkeley	6/14/202...	Sandra ...	7/5/2023 Submit...
DAS-010721	SABG22-PR-A...	Environm...	Ernest E. ...	By June 30, 2...		Berkeley	6/11/202...	Brian Hor...	New
DAS-010693	SABG22-PR-P...	Environm...	Ernest E. ...	By June 30, 2...		Berkeley	6/10/202...	Ronnie W...	7/5/2023 Submit...
DAS-010722	SABG22-PR-A...	Environm...	Ernest E. ...	By June 30, 2...		Berkeley	6/10/202...	Brian Hor...	New

All Active Portal Submissions

Edit columns Edit filters Filter by keyword

Submission ...	Grant Name	Objective	Organizat...	Performance ...	Funding Source	County of Op...	Date and ...	Contact N...	Submitte...	Submissio...
DAS-021760	SABG23-PR-ALL-PIC	Environmental-/	Behavioral Heal	Total number of corr	General Prev...	Pickens	1/24/2024 ...	Jason Evans		Draft
DAS-021759	SABG23-PR-ALL-PIC	Environmental-/	Behavioral Heal	Total number of corr	General Prev...	Pickens	1/24/2024 ...	Jason Evans	1/25/2024	Submitted
DAS-021758	SABG23-PR-ALL-PIC	Environmental-/	Behavioral Heal	Total number of corr	General Prev...	Pickens	1/24/2024 ...	Jason Evans	1/25/2024	Submitted
DAS-021757	SABG23-PR-ALL-PIC	Environmental-/	Behavioral Heal	Total number of corr	General Prev...	Pickens	1/24/2024 ...	Jason Evans	1/25/2024	Submitted
DAS-021756	SABG23-PR-ALL-PIC	Environmental-/	Behavioral Heal	Total number of corr	General Prev...	Pickens	1/24/2024 ...	Jason Evans	1/25/2024	Submitted
DAS-021755	SABG23-PR-ALL-YOF	Environmental-/	Keystone Subst:	Total number of corr	General Prev...	York	1/4/2024 2:...	Audrey Blanks	1/25/2024	Submitted
DAS-021754	SABG23-PR-ALL-YOF	Environmental-/	Keystone Subst:	Total number of corr	General Prev...	York	1/4/2024 2:...	Audrey Blanks	1/25/2024	Submitted
DAS-021753	SABG23-PR-ALL-YOF	Environmental-/	Keystone Subst:	Total number of corr	General Prev...	York	1/4/2024 1:...	Audrey Blanks	1/25/2024	Submitted
DAS-021752	SABG23-PR-ALL-YOF	Environmental-/	Keystone Subst:	Total number of hou	General Prev...	York	1/4/2024 1:...	Audrey Blanks	1/25/2024	Submitted
DAS-021751	SABG23-PR-ALL-YOF	Environmental-/	Keystone Subst:	Total number of corr	General Prev...	York	1/4/2024 1:...	Audrey Blanks	1/25/2024	Submitted
DAS-021750	SABG23-PR-ALL-YOF	Environmental-/	Keystone Subst:	Total number of corr	General Prev...	York	1/4/2024 1:...	Audrey Blanks	1/25/2024	Submitted

Contact DAODAS with any questions or technical assistance requests. We can walk you through this step-by-step as needed via TEAMS/ZOOM.
(prevention@daodas.sc.gov)

You can also save the view that was built for this report in order to come back to it month to month. That way you can skip steps 3-5 related to building the custom review. **Click on drop down arrow beside “All Portal Submissions” title and then click on “save as a new view”**

You can build any reports with any combination of data you want and then save/name the reports for future recall.

The screenshot shows the Dynamics 365 GrantVantage interface. The main content area displays a table of portal submissions. A view menu is open over the table, showing various view options. A blue arrow points to the 'Blank Duration Hours and Minutes (Submitted)*' view, which is circled in red. Another blue arrow points to the 'Save as new view' option in the menu, also circled in red.

Submission ID	Submitted	Submission Stat...	S
DAS-017559	10/30/2023	Submitted	
DAS-017558	10/30/2023	Submitted	
DAS-017557	10/30/2023	Submitted	
DAS-017555	10/30/2023	Submitted	
DAS-017000	10/16/2023	Submitted	
DAS-016996	10/16/2023	Submitted	
DAS-016816	10/12/2023	Submitted	
DAS-016810	10/12/2023	Submitted	
DAS-016808	10/12/2023	Submitted	
DAS-016803	10/12/2023	Submitted	
DAS-014408	10/12/2023		

View menu options:

- All Active Portal Submissions
- All Active Portal Submissions
- All Active Portal Submissions
- Blank Duration Hours and Minutes (Submitted)*
- Compliance Checks FY23
- Data Portal View
- Portal submission checks (Default)
- Portal submission checks
- All Active Portal Submissions
- Compliance Check Submissions
- Distribution of People Served by Age (INFO)
- Distribution of People Served by Gender (INFO)
- Inactive Portal Submissions
- People Served by Month (EDU & INFO)
- Prevention Portal Submissions
- Save changes to current view
- Save as new view
- Reset default view
- Manage and share views

Type what you want to name the report in the “description” field and then click the blue save button. Then the report will appear in the list for you to choose from and you do not need to rebuild it each time.

The screenshot shows the Dynamics 365 GrantVantage interface. A table titled "Blank Duration Hours and Minutes (Submitted)*" is displayed with columns for Submission ID, Submitted date, Submission Status, Strategy, Form Name, Total D..., Total Duration..., and Contact Name. A "Save as new view" dialog box is open in the foreground, with the "Name" field containing "Blank Duration Hours and ..." (circled in red) and the "Description" field containing "New Report with". A blue arrow points from the table to the dialog box. The interface includes a search bar, navigation menu, and various toolbars.

Submission ID	Submitted	Submission Stat...	Strategy	Form Name	Total D...	Total Duration ...	Contact Na
DAS-017559	10/30/2023	Submitted	Information Disseminat...	AET Casual Contacts	0	0	Lee Alst
DAS-017558	10/30/2023	Su		contacts	0	0	Lee Alst
DAS-017557	10/30/2023	Su		contacts	0	0	Lee Alst
DAS-017555	10/30/2023	Su		contacts	0	0	Lee Alst
DAS-017000	10/16/2023	Su		aturation Patrols	0	0	Lee Alst
DAS-016996	10/16/2023	Su		y Dispersals	0	0	Lee Alst
DAS-016816	10/12/2023	Su		ostings	0	0	Theresa
DAS-016810	10/12/2023	Submitted	Information Disseminat...	Brochures, Factsheets, Newsletters, Hando...	0	0	Theresa
DAS-016808	10/12/2023	Submitted	Information Disseminat...	Brochures, Factsheets, Newsletters, Hando...	0	0	Theresa
DAS-016803	10/12/2023	Submitted	Information Disseminat...	Brochures, Factsheets, Newsletters, Hando...	0	0	Theresa
DAS-014408	10/12/2023	Submitted	Environmental	Prescription Drug Deactivation Events	0	0	Theresa

- **Formatted “Canned” Reports Available in GMS:**
- Way Path is working on additional “canned” reports, however there are some available to view at this time.
- Reports available include:
 - Compliance Checks
 - Individual-based programs and strategies
 - Population-based programs and strategies
 - Single services by demographics
 - Number of media impressions
 - Number of persons served by individual or population-based programs and strategies
 - Distribution of people served by gender
 - Distribution of people served by age
 - People served in 12-month period
 - Prevention Strategy Report is only available to DAODAS at this time
- **To access:** Click on “reports” on bottom left of menu

- Analytics & Reporting
- Dashboards
- Portal Submissions
- Portal Submissions
- Participants
- Demographics
- Counties
- Activities
- Email Messages
- Settings
- Control Panels
- Form Cross Refere...
- Reports
- Reports
- DP DAODAS Portal

Show Chart + New Delete Refresh Visualize this view Email a Link Flow AI Builder Excel Templates

Portal Reports

Edit columns Edit filters Filter by keyword

Name	Report Type	Modified On	Description
Portal Compliance Check	Reporting Services Report	6/23/2023 4:13 PM	Portal Compliance Check
Individual-Based Programs and Strategies - Number of Perso...	Reporting Services Report	6/23/2023 4:13 PM	
Population-Based Programs and Strategies - Number of Pers...	Reporting Services Report	6/23/2023 4:13 PM	
Single Services by Demographic	Reporting Services Report	6/23/2023 4:13 PM	
Number of Media Likes Views Impressions and Shares	Reporting Services Report	6/23/2023 4:13 PM	
Prevention Strategy Report	Reporting Services Report	6/23/2023 4:13 PM	
Number of Persons Served by Individual- or Population-Base...	Reporting Services Report	6/23/2023 4:13 PM	
Distribution of People Served by Gender	Reporting Services Report	6/23/2023 4:13 PM	
Distribution of People Served by Age	Reporting Services Report	6/23/2023 4:12 PM	
Portal People Served - 12 Month Report	Reporting Services Report	6/23/2023 4:13 PM	Portal People Served - 12 Month Report

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- Choose report you want to view
- When template comes up, complete the fields as suggested below:
- **Year:** 2022
- **Reporting Period:** SC State fiscal year July 1-June 30
- **Strategy:** Select All (you can also narrow down by only one strategy at a time)
- **Intervention Type:** Select All (or if you are choosing one strategy, be sure to select the right intervention type for the strategy selected)
- **Counties:** Can choose one or multiple counties to view
- **Forms:** Select All
- **Organizations:** Select organization that matches the county or counties of service selected
- **Click “View Report”**
- Click on “save” icon to download report to PDF that can be provided to leadership or other partners
- Contact DAODAS with any questions or technical assistance requests. We can walk you through this step-by-step as needed via TEAMS/ZOOM. (prevention@daodas.sc.gov)

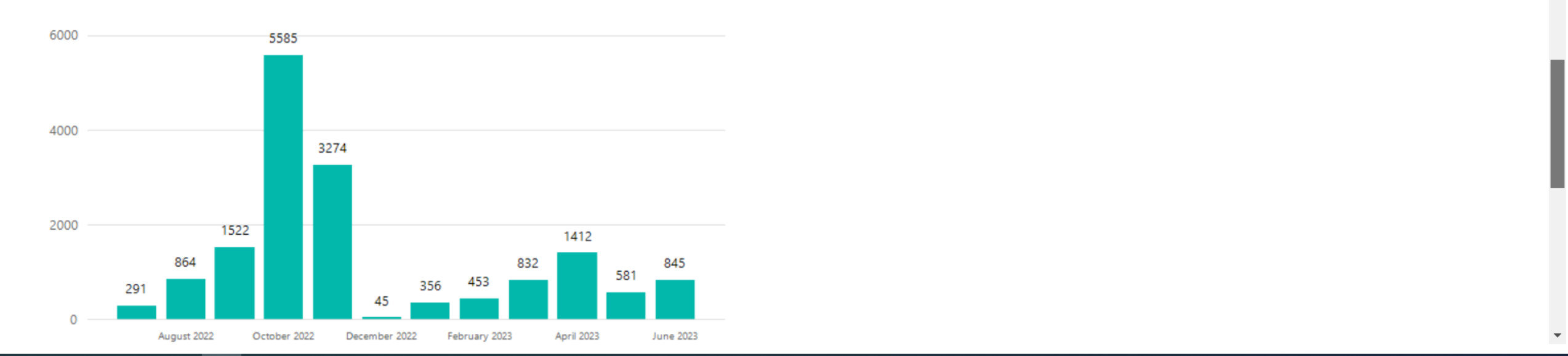
Year	2022	Reporting Period	SC Fiscal Year for the period July1 - June 30	View Report	
Override Start Date	<input type="text"/> <input type="calendar"/>	<input checked="" type="checkbox"/> NULL	Override End Date		<input type="text"/> <input type="calendar"/> <input checked="" type="checkbox"/> NULL
Strategy	Alternatives,Community-Based Pr				
Intervention Type	Universal Direct Individual (UDI),U	Counties	Aiken		
Forms	AET Casual Contacts,Alcohol and I	Organizations	Aiken Center for Alcohol & Other		

Year: 2022 | Reporting Period: SC Fiscal Year for the period July1 - June 30 | View Report

Override Start Date: NULL | Override End Date: NULL

Strategy: Alternatives,Community-Based Pr... | Intervention Type: Universal Direct Individual (UDI),U | Counties: Aiken | Forms: AET Casual Contacts,Alcohol and I | Organizations: Aiken Center for Alcohol & Other

Navigation: 1 of 1 | 100% | Find | Next



Completing Year- End Report Deliverable in GMS

- “Actuals” for each performance measure will be manually entered into GMS
- “Results” for each performance measure will pull over from the prevention data portal for all submitted forms. If there is a number that is not correct or blank, please check the status of the forms in the prevention data portal to ensure all forms have been submitted
- Pulling a data report (like the monthly reimburse check report) can allow you to easily sort by objective and enter the “actual” number of events into the performance measure-follow the steps previously outlined to download Excel file from DAODAS Data Portal tab in GMS

Excel ribbon: Home, Insert, Page Layout, Formulas, Data, Review, View, Help, Acrobat. Font: Calibri, 11. Alignment, Number, Styles, Cells, Editing, Sensitivity, Add-ins, Adobe Acrobat.

Submission ID	Grant Name	Objective	Organization	Performance Me	Funding Source	County of Operat	Date and Time	Contact Nam
DAS-022606	SABG23-PR-ALL-AIK- Environmental-Tobacco Compliance Check Operations - Tobacco		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 20:13	Kandy Foote
DAS-022605	SABG23-PR-ALL-AIK- Environmental-Tobacco Compliance Check Operations - Tobacco		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:42	Kandy Foote
DAS-022604	SABG23-PR-ALL-AIK- Environmental-Tobacco Compliance Check Operations - Tobacco		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:39	Kandy Foote
DAS-022603	SABG23-PR-ALL-AIK- Environmental-Tobacco Compliance Check Operations - Tobacco		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:22	Kandy Foote
DAS-022602	SABG23-PR-ALL-AIK- Environmental-Tobacco Compliance Check Operations - Tobacco		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:11	Kandy Foote
DAS-022600	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:53	Kandy Foote
DAS-022598	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:49	Kandy Foote
DAS-022597	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:44	Kandy Foote
DAS-022595	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:40	Kandy Foote
DAS-022594	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:27	Kandy Foote
DAS-022590	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:22	Kandy Foote
DAS-022588	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:18	Kandy Foote
DAS-022586	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 19:07	Kandy Foote
DAS-022584	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:54	Kandy Foote
DAS-022583	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:50	Kandy Foote
DAS-022582	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:42	Kandy Foote
DAS-022580	SABG23-PR-ALL-AIK- Community-based-AET coalition meetings - Underage Drinking		Aiken Center for	Total number of peo	General Prevention	Aiken	2/7/2024 13:22	Kandy Foote
DAS-022579	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:35	Kandy Foote
DAS-022578	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:19	Kandy Foote
DAS-022577	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:16	Kandy Foote
DAS-022547	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 18:13	Kandy Foote
DAS-022545	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:59	Kandy Foote
DAS-022543	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:52	Kandy Foote
DAS-022541	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:49	Kandy Foote
DAS-022538	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:46	Kandy Foote
DAS-022537	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:37	Kandy Foote
DAS-022536	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:32	Kandy Foote
DAS-022535	SABG23-PR-ALL-AIK- Environmental-Alcohol Compliance Check Operations - Underage Drinking		Aiken Center for	Total number of con	General Prevention	Aiken	2/7/2024 17:21	Kandy Foote

Screenshot from Excel Download of Reported filtered by Objective

D	E	F	G	H	I	J	K	L
Submission ID	Grant Name	Objective	Organization	Performance Me	Funding Source	County of Operat	Date and Time	Contact Nam
DAS-017309	SABG23-PR-ALL-AIK-	Alternatives-Alcohol and Drug Free Social and Recreational Events- Underage Drinking	Aiken Center for	Total number of people estimated to be ii	Aiken		10/26/2023 17:00	Tonya Avery
DAS-015785	SABG23-PR-ALL-AIK-	Alternatives-Alcohol and Drug Free Social and Recreational Events- Underage Drinking	Aiken Center for	Total number of people estimated to be ii	Aiken		9/30/2023 17:00	Tonya Avery

For this objective/performance measure, two events would be entered in the “actuals” for number conducted during fiscal year. The total head count for number of people served would be in the “results” performance measure as long as these forms were submitted.

Select the Primary Prevention (PRI-PR) project from your agency's project list

The screenshot shows the Dynamics 365 GrantVantage interface in a browser window. The main header displays 'Dynamics 365 | GrantVantage' and 'SANDBOX'. The left navigation pane includes sections for Home, Recent, Pinned, Grants, My Projects, To-Do List, Program Dashboards, Grant List, Organizations & People, Resources, and GrantVantage. The 'My Projects' section is active, showing a list of projects under 'Active Projects':

- Grant: ppDEMO Harm Reduction
- Grant: ppDEMO-SABG22-PR-PRI-TPR01-2022
- Grant: ppDEMO-SABG22-TX-ALL-GVL-2022
- Grant: ppDEMO-SOR23-IN-HR-AIK-2023010

The selected project, 'Grant: ppDEMO-SABG22-PR-PRI-TPR01-2022', is highlighted. The main content area shows a 'Budget Overview' chart, an 'Objective Performance Measure' chart, and a 'Grant Activities' section with 'No Data to Display'. Below these charts is a 'Project Details' table:

Project Details					
Grant Action	Grant	Grant Award No	pJ2005TPR01BG22	Project Manager	--
Project Status	Active	Project Total	196,755.00	Compliance Officer	--
Project Start	7/1/2022	Sub Projects	--	Authorized Certifying Officer	Premal-cpv Parikh
Project End	6/30/2023	Match Source	--		

Double click on the project to bring up the screen below:

The screenshot shows the Dynamics 365 GrantVantage interface in a browser window. The browser address bar shows the URL: `das-dev.cm9.dynamics.com/main.aspx?appid=c7829778-e04d-ec11-8c62-001dd802fb44&forceUCI=1&pagetype=entityrecord&etn=gb_grant&id=c0201568-fd17-ed11-b83c-001dd8011a31&cm...`

The interface header includes "Dynamics 365 | GrantVantage" and "SANDBOX". The main content area displays the following information:

- Grant ID:** ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630 - Saved
- Project Total:** \$196,755.00
- Grant Status:** Active
- Project Start:** 7/1/2022
- Project End:** 6/30/2023

The "Grant Details" tab is active, showing a table with the following data:

Field	Value
Grantee Applicant*	Grantee Program Office
Application ID	---
Authorized Certifying Official	Primary Grantee Project Manager/Coordinator
Primary Grantee Department Director/Manager	---
Grantee Department	Primary Grants Compliance Officer
High Risk	---
	Grantee Project Team 1*
	Premaal-cpv Parikh
	Grantee Project Team 2

The interface also includes a left-hand navigation pane with options like Home, Recent, Pinned, Grants, My Projects, To-Do List, Program Dashboa..., Grant List, Organizations & People, Resources, and GrantVantage. The bottom status bar shows the date 1/12/2023, time 11:51 PM, and weather 44°F Cloudy.

Click on “Related” tab to bring up menu as seen below

The screenshot displays the Dynamics 365 GrantVantage interface. The main header shows 'Dynamics 365 | GrantVantage' and 'SANDBOX'. The left navigation pane includes sections for 'Home', 'Recent', 'Pinned', 'Grants', 'Organizations & People', and 'Resources'. The 'Grants' section is active, showing a list of grants. The selected grant is 'ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630 - Saved'. The grant details are displayed in a table format:

Field	Value
Project Total	\$196,755.00
Grant Status	Active
Project Start	7/1/2022
Project End	6/30/2023

Below the table, there are tabs for 'Grant Details', 'Budget Period', 'Grant Users', 'Sub-Projects', 'Notes & Attachments', and 'Related'. The 'Related' tab is selected, showing a list of related items:

- Project Plan
- Portal Submissions
- Budgeting
- Drawdowns & Disbursements
- Assessment
- Agreements
- Reports
- Report Schedule
- Grant Close-Out
- Communication
- Currencies

The bottom of the interface shows a task bar with 'Email Correspondence', 'Refresh', 'Flow', and 'Run Report' options. The system tray at the bottom right indicates the date and time as 1/18/2023, 11:52 PM.

Single click on “Project Plan” to bring up your project “Goals”

The screenshot shows the Dynamics 365 GrantVantage interface. The main header displays "Dynamics 365 | GrantVantage" and "SANDBOX". The left navigation pane includes sections for "Home", "Recent", "Pinned", "Grants", "Organizations & People", and "Resources". The "Grants" section is expanded, showing "My Projects", "To-Do List", "Program Dashboa...", and "Grant List". The "Grant List" item is selected, and the main content area displays the details for a grant: "ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630 - Saved". The grant details include a "Project Total" of \$196,755.00, an "Active" status, a "Project Start" date of 7/1/2022, and a "Project End" date of 6/30/2023. The "Project Plan" tab is selected in the navigation bar, and the main content area displays a table of goals. The table has columns for "Goal Name", "Goal Description", "Start Date", and "End Date". The table contains three rows of goals:

Goal Name	Goal Description	Start Date	End Date
TPR County: Reduce Underage drinking			
TPR County: Reduce underage tobacco use			
TPR02 County: Reduce Underage drinking			

Single click on a "Goal" to bring up the "Objectives"

The screenshot shows the Dynamics 365 GrantVantage interface. The main header displays 'Dynamics 365 | GrantVantage' and 'SANDBOX'. The breadcrumb trail indicates the current view is 'Project Plan' for a grant titled 'ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630'. Key metrics shown include a Project Total of \$196,755.00, an Active Grant Status, a Project Start date of 7/1/2022, and a Project End date of 6/30/2023.

The 'Project Plan' tab is active, showing a table of goals. One goal is highlighted: 'TPR County: Reduce Underage drinking'. Below this, a table lists the objectives for this goal.

Num	Ref. ID	Objective Name	Objective Description	Manager	Start	End	Status
1	PR-ID-UDP-SpE-UAD	Information Dissemination-Speaking engagements	Disseminate information to the citizens of TPR County on the dangers of underage alcohol use through speaking engagements.	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved
2	PR-ID-UDP-HF-UAD	Information Dissemination-Health Fairs and Other Health Promotion	Disseminate information to the citizens of TPR County on the dangers of underage alcohol use through health fairs	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved
4	PR-ED-UDI-LS-UAD	LifeSkills©: Middle/Jr High School Students	Provide the Life Skills© curriculum to middle school students to address favorable attitudes and beliefs related to tobacco/nicotine use.	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved
6	PR-EN-UIP-ACM-UAD	Environmental: Compliance Checks	TRP will also collaborate with AET partners to conduct alcohol compliance checks in TRP County.	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved

Additional goals listed below the table include 'TPR County: Reduce underage tobacco use' and 'TPR02 County: Reduce Underage drinking'.

Single Click on an “Objective” to bring up the “Performance Measure” (PM) option

The screenshot shows the Dynamics 365 GrantVantage interface for a grant record. The grant is titled "ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630" and is in an "Active" state with a total value of \$196,755.00. The project start date is 7/1/2022 and the end date is 6/30/2023. The interface displays a table of objectives and performance measures.

Num	Ref. ID	Objective Name	Objective Description	Manager	Start	End	Status
1	PR-ID-UDP-SpE-UAD	Information Dissemination-Speaking engagements	Disseminate information to the citizens of TPR County on the dangers of underage alcohol use through speaking engagements.	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved

Ref. ID	Performance Measure	Manager	Type	Planned	Actual	Status
PR-ID-UDP-SpE-UAD	1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.	Premal-cpv Parikh	Number (Actual)	5	4	In Progress
PR-ID-UDP-SpE-UAD	1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.	Premal-cpv Parikh	Number (Actual)	5		Not Started
PR-ID-UDP-SpE-UAD	2. Measure Description: Provide speaking engagements on the dangers of underage drinking to reach 500 citizens in TPR County.	Premal-cpv Parikh	Number (Results)	500		Not Started
PR-ID-UDP-SpE-UAD	2. Measure Description: Provide speaking engagements on the dangers of underage drinking to reach 500 citizens in TPR County.	Premal-cpv Parikh	Number (Results)	500		Not Started

Single Click on “PM” to open up the “PM” for reporting

The screenshot displays the Dynamics 365 GrantVantage interface for a grant record. The grant is titled "ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630" and is in an "Active" status. The project start date is 7/1/2022 and the end date is 6/30/2023. The total project value is \$196,755.00. The interface shows various tabs including Grant Details, Budget Period, Grant Users, Sub-Projects, Notes & Attachments, Project Plan, and Related. The Project Plan tab is active, showing a table of objectives and performance measures. One performance measure is highlighted in blue, indicating it is selected for reporting.

Num	Ref. ID	Objective Name	Objective Description	Manager	Start	End	Status
1	PR-ID-UDP-SpE-UAD	Information Dissemination-Speaking engagements	Disseminate information to the citizens of TPR County on the dangers of underage alcohol use through speaking engagements.	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved

Ref. ID	Performance Measure	Manager	Type	Planned	Actual	Status
PR-ID-UDP-SpE-UAD	1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.	Premal-cpv Parikh	Number (Actual)	5	4	In Progress
PR-ID-UDP-SpE-UAD	1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.	Premal-cpv Parikh	Number (Actual)	5		Not Started
PR-ID-UDP-SpE-UAD	2. Measure Description: Provide speaking engagements on the dangers of underage drinking to reach 500 citizens in TPR County.	Premal-cpv Parikh	Number (Results)	500		Not Started
PR-ID-UDP-SpE-UAD	2. Measure Description: Provide speaking engagements on the dangers of underage drinking to reach 500 citizens in TPR County.	Premal-cpv Parikh	Number (Results)	500		Not Started

Double click on “PM” to open up the “PM” details screen for reporting

The screenshot displays the Dynamics 365 GrantVantage interface. The main window shows a grant record for "ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630" with a total value of \$196,755.00 and an active status. The "Project Plan" tab is selected, showing a table of performance measures. A modal window titled "Performance Measure" is open, displaying details for a specific measure:

- Measure Description:** 1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.
- Type of Measure:** Number
- Manager:** Premal-cpv Parikh
- Start Date:** 7/1/2022
- End Date:** 6/30/2023
- Reference ID:** PR-ID-UDP-SpE-UAD
- Planned:** 5
- Actual:** 4
- Execution:** Actual (Actual Amount entered manually by the user)

Steps to enter “Actuals” for Year-end reports

- Double click on the PM to open up the reporting screen for this performance measure.

The screenshot displays the Dynamics 365 GrantVantage interface. The main window shows a grant record for 'ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630' with a total value of \$196,755.00. The 'Project Plan' tab is active, showing a table of performance measures. One measure is highlighted, and its 'Performance Measure' form is open. The form includes fields for Measure Description, Type of Measure (Number), Manager (Premal-cpv Parikh), Start Date (7/1/2022), End Date (6/30/2023), Reference ID (PR-ID-UDP-SpE-UAD), Planned amount (5), and Execution (Actual). The 'Actual' field is currently empty, and the text '(Actual Amount entered manually by the user)' is visible below it.

Update number under “actual” Single click on the “disk” icon with the “x” at the top to save and close the form

The screenshot shows a web browser window displaying a grant management system. The main page is titled "ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630 - Saved Grant". It shows a project total of \$196,755.00, an active grant status, a project start date of 7/1/2022, and a project end date of 6/30/2023. The "Project Plan" tab is selected, and a "Performance Measure" form is open. The form contains the following fields:

- Measure Description: 1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.
- Type of Measure: Number
- Manager: Premal-cpv Parikh
- Start Date: 7/1/2022
- End Date: 6/30/2023
- Reference ID: PR-ID-UDP-SpE-UAD
- Planned: 5
- Actual: (empty field with a red border)
- Execution: Actual

At the bottom of the form, there is a note: "(Actual Amount entered manually by the user)". The form has a "Save" icon (disk) and a "Close" icon (x) at the top right.

After the form saves, it will take you back to the screen below and you should see the number you entered displayed under the “actual” column.

Grant: Information: ppDEMO-SABG22-PR-PRI-TPR01-20220701-20230630 - Saved

\$196,755.00 Project Total | Active Grant Status | 7/1/2022 Project Start | 6/ Pr

Grant Details | Budget Period | Grant Users | Sub-Projects | Notes & Attachments | **Project Plan** | Related

REFRESH + ADD GOAL GOAL

Goal Name	Goal Description	Start Date	End Date
TPR County: Reduce Underage drinking			

+ NEW REQUEST CHANGE VIEW CHANGES || DEACTIVATE

Num	Ref. ID	Objective Name	Objective Description	Manager	Start	End	Status
1	PR-ID-UDP-SpE-UAD	Information Dissemination-Speaking engagements	Disseminate information to the citizens of TPR County on the dangers of underage alcohol use through speaking engagements.	Premal-cpv Parikh	7/1/2022	6/30/2023	Approved

Performance Measure (4) + NEW

Ref. ID	Performance Measure	Manager	Type	Planned	Actual	Status
PR-ID-UDP-SpE-UAD	1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.	Premal-cpv Parikh	Number (Actual)	5	2	In Progress
PR-ID-UDP-SpE-UAD	1. Measure Description: Provide five speaking engagements on the dangers of underage drinking to reach citizens in TPR County.	Premal-cpv Parikh	Number (Actual)	5		Not Started
PR-ID-UDP-SpE-UAD	2. Measure Description: Provide speaking engagements on					

Tips for FY25 SABG Prevention Application

Each application will contain copies of relevant GOP spreadsheets— Just as last year, they will be locked except for the “Goal” field, the “Manager” fields and the “Planned” fields for each performance measure.

In order to fill out the sheets correctly, please enter the name of the county you are filling this out for in the “Goal” field, replacing the text, “[**County Name**]”. There must be a different sheet for each county you are implementing services.

Please fill in the “Manager” field with the name of the person responsible for entering the data in GMS. This is someone with a GMS license, for the production side. For PREVENTION, there may be individuals who enter data on the portal that do not have a GMS license, the “Manager” field is for the individual responsible for entering the information in the GMS project. **PLEASE be sure to enter the name exactly as it appears in GMS.** We ask that you look at the current year’s project to ensure proper form for names. If your name is Pete Mitchell, and in GMS you are listed as Peter Mitchell, you must enter it as Peter Mitchell.

Tips for FY25 SABG Prevention Application

Please enter the projected SFY25 outcome metric for each measure in the “Planned” field. Enter a “0” if you do not plan to implement the strategy. Entering a “0” will let DAODAS know we need to delete that objective and performance measure when we set-up the project in GMS. We suggest you look to your SFY24 project as a guide for estimating planned amounts. You can estimate your year end data by looking at your mid-year data and making the appropriate calculations.

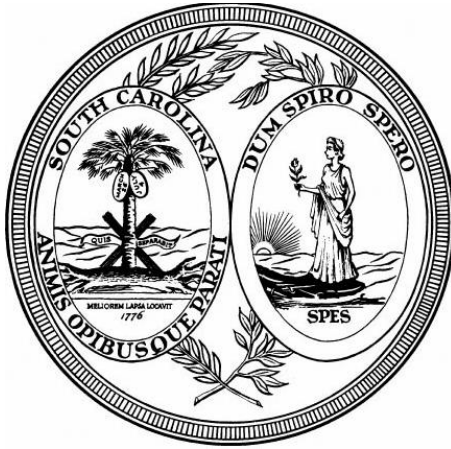
Complete **all Excel spreadsheets** related back to the programs and strategies your agency plans to fund utilizing the SAPT BG primary prevention funds. For example, if you plan to implement 2 Take Back Days with your SAPT BG funds and 2 Take Back Days with the Opioid Settlement funds the agency receives, collecting a total of 200 pounds of medicine in the four events, the sheet for opioids should be completed with the performance measure for the SAPT BG set for 2 Take Back Days and 100 pounds of medicine collected (for example).

If a goal/objective/performance measure is not included in your agency’s project at the beginning of the fiscal year but you add a service at any point in time that you do not have a goal/objective/performance measure to report under, don’t just put your data in the portal under a similar goal-email prevention@daodas.sc.gov and ask that a measure be added so reporting can be accurate!

South Carolina

DAODAS

South Carolina Department of Alcohol and Other Drug Abuse Services



South Carolina

DAODAS

Department of Alcohol and Other Drug Abuse Services

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