



INDIANA GMS MANUAL

May 2022



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PURPOSE AND INTENT OF MANUAL

The purpose of this technical guide is to assist grant administrators, sub-recipients, and stakeholders in using the GMS system for the purposes of administration. Any programmatic information will be found in the CDBG Handbook.

If there are any question related to the above, please contact OCRA staff or Grant Services.

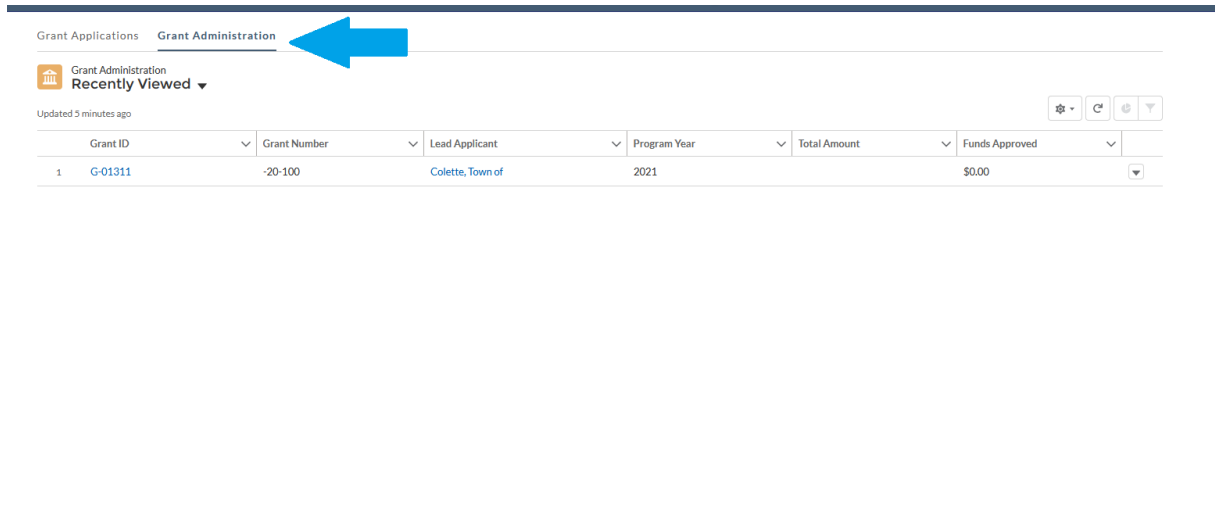
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QUICK START GUIDE: GENERAL TIPS FOR GMS

ACCESSING YOUR GRANT INFORMATION AFTER AWARD

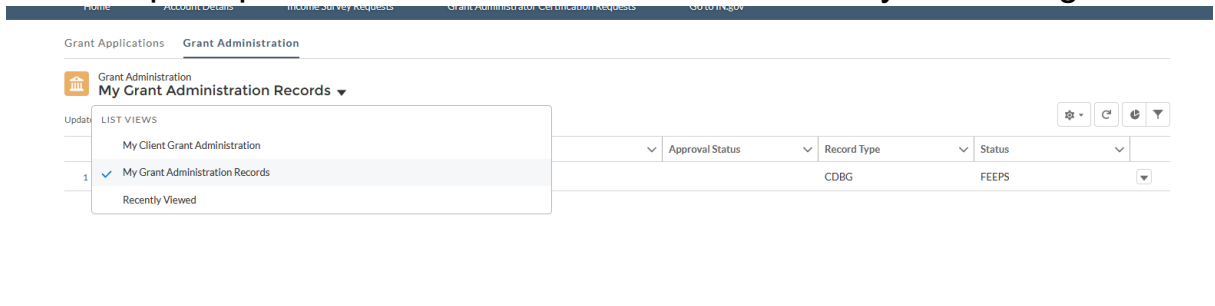
Click the **Account Details** tab on the **GMS Navigation Menu**.

1. Click the **Grant Administration Tab** under the **GMS Navigation Menu**.
 - a. It will be underlined blue when it's selected.



2. Click the down arrow under Grant Administration and click **My Grant Administration Records**.

- a. This will pull up all the Grant Administration Records you're assigned.



Grant Applications Grant Administration

Grant Administration
My Grant Administration Records ▾

Updated a few seconds ago

Grant ID ↑	Lead Applicant	Account Name	Approval Status	Record Type	Status
1 G-01311	Colette, Town of	Colette, Town of		CDBG	FEEPS

ADDING INFORMATION TO SPACES


Most boxes contain a pencil on the right of it to add information to the space. The information will not be added unless it's saved.

Acquisition

Number of properties to be acquired

Property Card Reminder ⓘ

Please remember to fill out a property card for each parcel and easement that will be acquired for this project. Each property card has a Notes and Attachments section for you to upload its corresponding documentation.



UPLOADING FILES IN THE STATUS REPORTS

Note: This process is different when uploading files into a FEPS record. When uploading documents in a FEPS record, please refer to the FEPS record section of this document.

OPTION 1: UPLOADING NEW FILES

- Select **Upload Files** in the **Files** window located in the upper-right of the report, to open the upload window.
- Locate the files in the storage space on your device and press **Enter** on your keyboard or select **Open** at the bottom of the File Explorer.
- Verify all documents needed are successfully uploaded.
- Click **Done** to close the upload window.
 - Because of system limitations, you may need to upload documents in multiple batches if you have more than ten files.

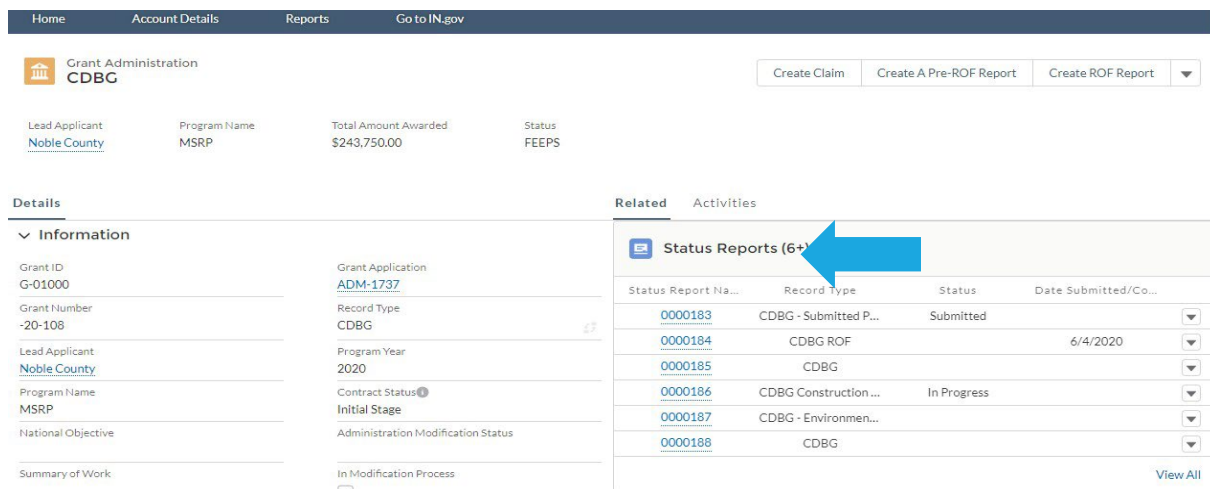
OPTION 2: SELECTING FILES FROM THE LIST OF PREVIOUSLY UPLOADED FILES

- a. Click **Add Files** in the **Files** window found in the upper-right of the report.
 - a. This will open the file selector window.
- b. Scroll through the list of previously uploaded files and click the one you would like to upload.
- c. Click Upload.

RECALLING YOUR INFORMATION

If you submitted the report but need to change a field or upload another document, you can recall the report. You will then be able to edit or upload any item and resubmit.

1. From the Grant Administration record (G-00000), click on Status Reports on the right side of the screen



The screenshot shows the Grant Administration CDBG interface. The top navigation bar includes Home, Account Details, Reports, and Go to IN.gov. The main header displays 'Grant Administration CDBG' and three buttons: 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. Below the header, key information is displayed: Lead Applicant (Noble County), Program Name (MSRP), Total Amount Awarded (\$243,750.00), and Status (FEEPS).

The 'Details' section is expanded to show 'Information'. The 'Related' tab is active, displaying a list of 'Status Reports (6+)'. A blue arrow points to the 'Status Reports (6+)' link. The table below shows the following data:

Status Report Na...	Record Type	Status	Date Submitted/Co...
0000183	CDBG - Submitted P...	Submitted	
0000184	CDBG ROF		6/4/2020
0000185	CDBG		
0000186	CDBG Construction ...	In Progress	
0000187	CDBG - Environmen...		
0000188	CDBG		

A 'View All' link is located at the bottom right of the table.

- b. Alternatively, if the Status Report is already shown in the list, you can click directly to it.
2. You will see a list of all Status Reports for this grant. Click on the Blue Status Report Name you would like to Recall.

Grant Administration > G-01000
Status Reports

Updated a few seconds ago

	Status Report Name	Record Type	Status
1	0000183	CDBG - Submitted Pre-ROF	Submitted
2	0000184	CDBG ROF	
3	0000185	CDBG	
4	0000186	CDBG Construction Release	In Progress
5	0000187	CDBG - Environmental Review	
6	0000188	CDBG	
7	0000189	CDBG Pre-ROF	In Progress

- Once you are viewing the Status Report, on the right-hand side, there will be a button to Recall the report. This will only appear if the Status Report has been submitted and is still Pending.

Status Report
0000183

Record Type: CDBG - Submitted Pre-ROF

Status Report Submission Date: 6/4/2020

Grant Administration: [G-01000](#)

Details

Status Report Name: 0000183

Grant Administration: [G-01000](#)

Status Report Submission Date: 6/4/2020

Procurement Review

IFB Uploaded:

Bid Affidavit Uploaded:

Date of Advertisement 1: 4/4/2020

Date: 6/4/2020

Status: Submitted

Relative Status Report:

Was a copy of the IFB provided?

Was the IFB advertised two (2) times?

Was the affidavit provided?

Ad Date 1 is accurate:

Related

Files (0) Add Files

Upload Files

Or drop files

Approval History (2) Recall

Step Name	Date	Status	Assigned To
Step 1	6/4/2020 8:14 PM	Pending	Grant Services
Approval Request ...	6/4/2020 8:14 PM	Submitted	Adam S Test

[View All](#)

- When you click on Recall, a screen will pop up for Comments. Enter the reason you are recalling the report and click on Recall in the bottom right corner.

Recall Approval Request

Comments

Need to correct information

5. The Approval Process will show the Status Report has been Recalled. You will now be able to edit the Status Report and Submit for Approval again.

Status Report
0000183

Record Type
CDBG Pre-ROF

Status Report Submission Date
6/4/2020

Grant Administration
[G-01000](#)

Details

Status Report Name 0000183	Date 6/4/2020
Grant Administration G-01000	Status In Progress
Status Report Submission Date 6/4/2020	Relative Status Report

Related

Files (0)

Or drop files

Files (0)
Add Files

Upload Files

Or drop files

Approval History (2)

Step Name	Date	Status	Assigned To
Step 1	11/1/2021 2:06 PM	Recalled	Grant Services ▼



FINDING AN OPEN REPORT/ CHECKING THE STATUS OF A REPORT

1. All open reports will automatically show up on the first page after you click the Status Report button.

Lead Applicant Colette, Town of	Program Name WDW	Total Amount Awarded \$389,750.00	Status FEEPS
--	---------------------	--------------------------------------	-----------------

Details

Information

Grant ID
G-01311

Grant Number
-20-100

Lead Applicant
[Colette, Town of](#)

Program Name
WDW

National Objective

Summary of Work

Federal Employer ID #
59-55555555

Contact

Davis Bacon Indicator

Account Name
Colette, Town of

Agreement Details

Agreement Created Date

Related Activities

Status Reports (6+)

Status Report Name	Record Type	Status	Date Submitted/Compl...
0001065	CDBG - Submitted Envir...	Submitted	
0001066	CDBG Construction Rel...	In Progress	
0001067	CDBG - Submitted Envir...	Submitted	
0001069	CDBG - Environmental R...		
0001070	CDBG Sub-Recipient Se...	In Progress	
0001072	CDBG Sub-Recipient Se...	In Progress	

[View All](#)

Grant Modifications (0)

[New](#)

FEEPS (1)

FEEPS Name	Approval Status	Property Requires Acq...	Number of properties to...
F-0241	New	<input type="checkbox"/>	bv b bb bv

[View All](#)

10

2. Click View All will give you more detail on all reports.

Grant Administration > G-01311
Status Reports

Updated a few seconds ago

	Status Report Name	Record Type	Status	Date Submitted/Completed
1	0001065	CDBG - Submitted Environment Review	Submitted	
2	0001066	CDBG Construction Release	In Progress	
3	0001067	CDBG - Submitted Environment Review	Submitted	
4	0001069	CDBG - Environmental Review		
5	0001070	CDBG Sub-Recipient Semi-Annual	In Progress	
6	0001072	CDBG Sub-Recipient Semi-Annual	In Progress	
7	0001071	CDBG Sub-Recipient Semi-Annual	In Progress	
8	0001073	CDBG	Submitted	

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GMS ADMINISTRATION

FEEPS

INTRODUCTION

GMS is currently updating the system to reflect the new administration changes. Throughout this document, FEEPS and FEPS will be used synonymously.

SUBMITTING A FEPS REPORT

1. Scroll down to locate the **FEEPS Widget**, located on the right side of the **Grant Administration** page.
2. To open the **FEEPS Record**, select the **FEEPS ID (F-XXX)**.

The screenshot displays the 'Grant Administration' page with a summary table at the top:

Lead Applicant	Program Name	Total Amount Awarded	Status
Colette, Town of	WDW	\$389,750.00	FEEPS

Below the summary table, the 'Details' section is expanded to show 'Information'. The 'FEEPS (1)' widget is highlighted with a blue arrow, showing a table with one record:

FEEPS Name	Approval Status	Property Requires Acqui...	Number of properties to...
F-0241	New	<input type="checkbox"/>	

3. Complete the required fields, Civil Rights Officer and Labor Standards Officer. Then, complete all other applicable fields.
4. Scroll down and review the **Threshold Comments**. If there are threshold comments, ensure documentation to address those comments in provided where it is appropriate to upload.
5. Once comments are reviewed, click **Save**.
6. For each applicable section, upload supporting documentation clicking **File Uploads**, scrolling down, and by doing either of the following:

- a. Clicking **Upload files** and selecting the appropriate file from your computer
 - b. Selecting a file from your computer and moving over the files near the drop files button.
7. Once all applicable fields have been completed and all required documentation has been uploaded, select **Submit for Approval**.
8. To verify the **FEPS Record** was successfully submitted, navigate back to the **Grant Administration** page.

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ENVIRONMENTAL REVIEW RELEASE REPORT

INTRODUCTION

All ER documentation including maps, forms and supporting documentation are uploaded to the Environmental Review Report. Grant Services has compiled a list of HUD/Grant Services-preferred resources and tools for obtaining documentation for completing the environmental review.

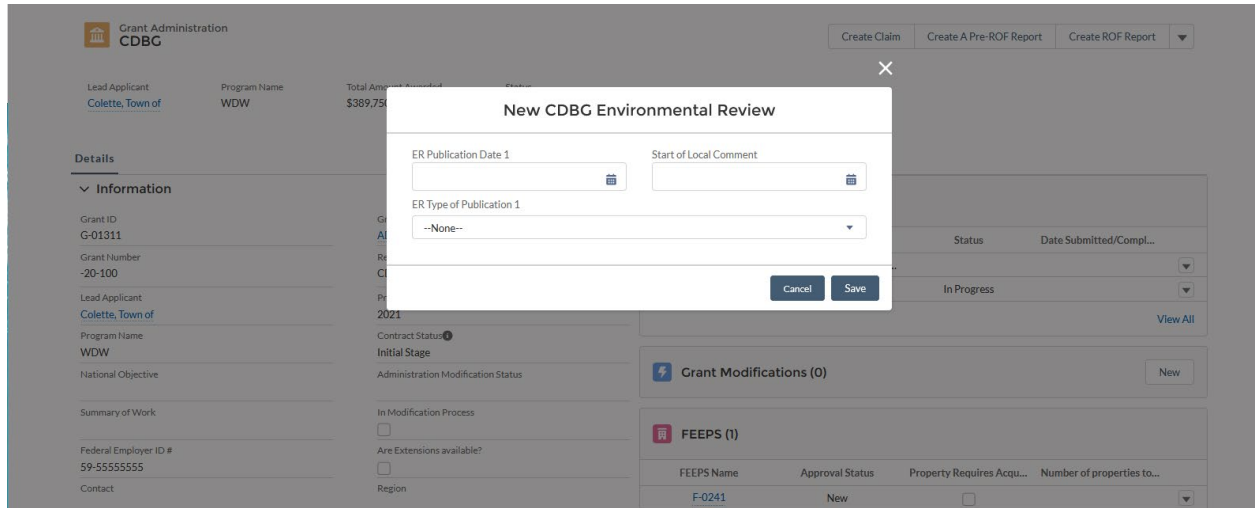
Grantees are not required to use the resources provided in the ERR, but they are highly encouraged to do so. OCRA created these resources and made these available to grantees by state and federal agencies to better aid grantees in completing their ERR.

OPENING AN ENVIRONMENTAL RELEASE REPORT

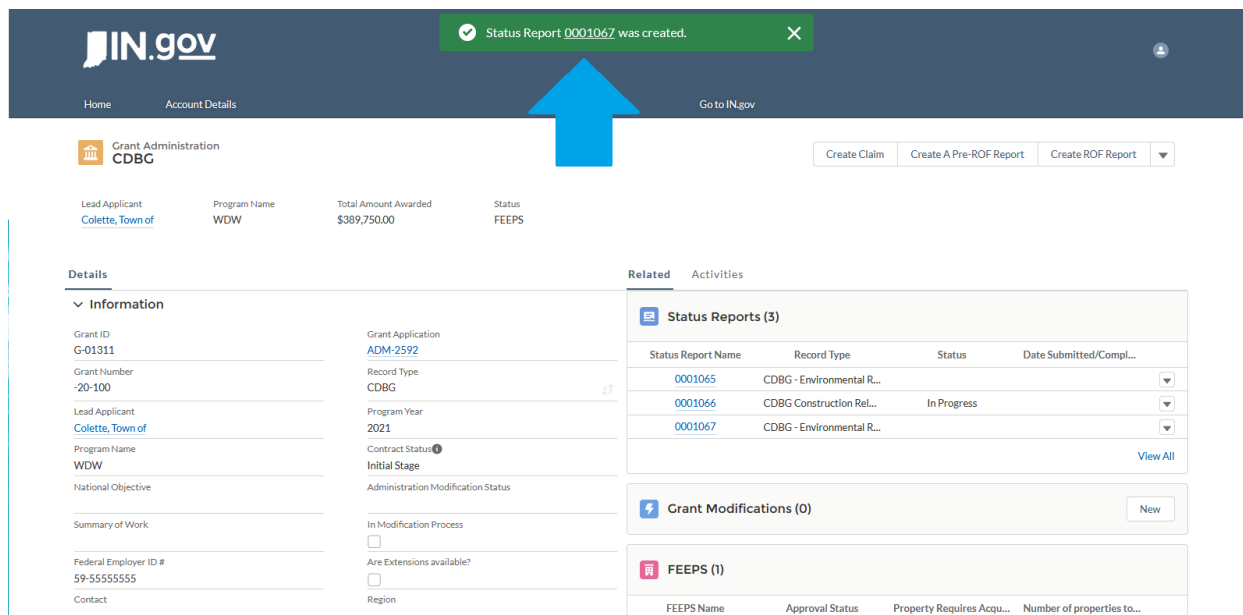
1. Select the Grant you need to create an **Environmental Review Report**.
2. Open the ER Report by using the Report dropdown Grant Administration Page OR Opening the FEPS record.
- 3A. **Option 1: Opening an ERR with the Report Drop Down.**
 - b. Select the dropdown arrow next to Create ROF Report and click **New CDBG Environmental Review**.

The screenshot displays the Grant Administration CDBG interface. At the top right, there are three buttons: 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A dropdown menu is open from the 'Create ROF Report' button, showing several options: 'Create CDBG Construction Release Report', 'CDBG Semi-Annual Report', 'Create Sub-Recipient Semi-Annual', 'Start Closeout', 'New CDBG Environmental Review', and 'Create New Job Retention Business Report'. A blue arrow points to the 'New CDBG Environmental Review' option. Below the buttons, there is a table with columns for 'Status Report Name', 'Record Type', 'Status', and 'Date Submitted/Compl...'. The table contains two rows: one with '0001065' and 'CDBG - Environmental R...' and another with '0001066' and 'CDBG Construction Rel...'. Below the table, there is a section for 'Grant Modifications (0)' and a section for 'FEEPS (1)'. The 'FEEPS (1)' section contains a table with columns for 'FEEPS Name', 'Approval Status', 'Property Requires Acqu...', and 'Number of properties to...'. The table contains one row with 'F-0241' and 'New'.

- c. When a window titled “New CDBG Environmental Review” appears, fill out the fields and click save.



- d. When the green status bar with the six-digit report ID appears, click it to open the full Environmental Review Report.



3B Option 2: Opening an Environmental Review Report with The FEEPS Record.

- a. Scroll down to the FEPS widget.
- b. Select the FEPS record you want to modify by clicking on the record # (F-#####).

The screenshot displays the 'Details' page for a grant. At the top, summary information is shown: Lead Applicant (Colette, Town of), Program Name (WDW), Total Amount Awarded (\$389,750.00), and Status (FEEPS). Below this, the 'Information' section contains fields for Grant ID (G-01311), Grant Number (-20-100), Lead Applicant (Colette, Town of), Program Name (WDW), National Objective, Summary of Work, Federal Employer ID # (59-5555555), Contact, Davis Bacon Indicator, Account Name (Colette, Town of), and Agreement Created Date. The 'Related' section on the right includes 'Status Reports (3)', 'Grant Modifications (0)', 'FEEPS (1)', and 'Files (0)'. The 'FEEPS (1)' section contains a table with one record: F-0241, Approval Status: New, Property Requires Acq...: [checkbox], and Number of properties to...: [dropdown]. A blue arrow points from the 'Follow Up Type' field in the 'Information' section to the 'F-0241' record in the 'FEEPS (1)' section.

- c. Once in the FEPS record, select 'Create ER Report'.
- d. When a window titled "New CDBG Environmental Review" appears, fill out the fields and click save.

The screenshot shows the same GMS interface as above, but with a modal dialog box titled "New CDBG Environmental Review" open in the center. The dialog box has a close button (X) in the top right corner. It contains three input fields: "ER Publication Date 1" with a calendar icon, "Start of Local Comment" with a calendar icon, and "ER Type of Publication 1" with a dropdown menu showing "--None--". At the bottom of the dialog box are "Cancel" and "Save" buttons. The background interface is dimmed.

- e. When a green status bar with a six-digit report ID appears, click it to open the full ER Report.

The screenshot shows the IN.gov Grant Administration CDBG portal. A green notification banner at the top states "Status Report 0001067 was created." with a close button. Below the notification, a blue arrow points to the notification. The main content area is divided into "Details" and "Related" sections. The "Details" section includes fields for Grant ID (G-01311), Grant Number (-20-100), Lead Applicant (Colette, Town of), Program Name (WDW), National Objective, Summary of Work, Federal Employer ID # (59-5555555), and Contact. The "Related" section includes "Status Reports (3)", "Grant Modifications (0)", and "FEEPS (1)".

Status Report Name	Record Type	Status	Date Submitted/Compl...
0001065	CDBG - Environmental R...		
0001066	CDBG Construction Rel...	In Progress	
0001067	CDBG - Environmental R...		

FILLING OUT THE ER STATUS REPORT

1. Review the Form 6: RROF/C rule and upload Form 6 within a timely manner.
2. When Form 6 is uploaded, check the Form 6 uploaded box.
 - a. The report will now find whether Form 6 was submitted timely or late.
 - b. If late, you must submit an RROF/C Delayed Response Letter. See [RROF/C 10-Day Rule Guide](#).
3. Enter the applicable date in the **Start of State Comment** field and click **Save**.

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<p>* Start of Local Comment ↶</p> <p>9/7/2021 📅</p> <p>End of Local Comment Period ⓘ</p> <p>Were there Local Comments? ⓘ</p> <input type="checkbox"/> <p>On or about Date</p> <p>Form 6 Reminder ⓘ</p> <p>Please upload Form 6 the day after the local comment period ends. If Form 6 is not uploaded within 10 business days after the local comment period has ended, you will have to re-advertise and the local comment period will start over. Remember to fill in one of the check boxes for Question 4 on the back of Form 6.</p> <p>ER Form 6 Uploaded ⓘ</p> <input checked="" type="checkbox"/>	<p>ER Type of Publication 2 ⓘ</p> <p>--None-- ▾</p> <p>Start of State Comment ↶</p> <p>10/6/2021 📅</p> <p>End of State Comment Period ⓘ</p> <p>Were there State Comments? ⓘ</p> <input type="checkbox"/> <p>Release Date</p> <p>ER Form 6 Uploaded Date</p>
<p>RROF CEO Delayed Response Letter Needed</p> <p>No</p>	<p>Cancel Save</p>

- a. This date is one calendar day AFTER Form 6 has been uploaded to the report.
- b. This will auto calculate the **End of State Comment Period** field.

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Start of Local Comment 10/5/2021	ER Type of Publication 2 ⓘ
End of Local Comment Period ⓘ 10/19/2021	Start of State Comment 11/1/2021
Were there Local Comments? ⓘ <input type="checkbox"/>	End of State Comment Period ⓘ 11/16/2021
On or about Date	Were there State Comments? ⓘ <input type="checkbox"/>
Form 6 Reminder ⓘ Please upload Form 6 the day after the local comment period ends. If Form 6 is not uploaded within 10 business days after the local comment period has ended, you will have to re-advertise and the local comment period will start over. Remember to fill in one of the check boxes for Question 4 on the back of Form 6.	
ER Form 6 Uploaded ⓘ <input checked="" type="checkbox"/>	Release Date
RROF CEO Delayed Response Letter Needed	ER Form 6 Uploaded Date 10/6/2021



4. Indicate if there were local and/or state comments by checking the applicable boxes.
5. Upload copies of the local and/or state written comments.
6. Scroll down to the **Maps & Supporting Documentation** section.
 - d. Check any/all files you want to add to the ER report.
 - e. Submit the ER Report to Grant Services by selecting **Submit for Approval** in the upper-right corner of the report.

Status Report 0001065			Edit Printable View Submit for Approval
Record Type CDBG - Environmental Review	Status Report Submission Date 9/23/2021	Grant Administration G-01311	

- a. A pop-up window will appear, allowing you to type any comments you may have for Grant Services.

Submit for Approval

Comments

|

Cancel

Submit

- f. Type any comments or leave the comment section blank and click **Save**.
 - a. Once the report has been submitted, you will be taken to the completed report for your review.

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PRE-ROF INTRODUCTION

The Pre-ROF Report is used to collect procurement documentation and information, along with initial labor standards information for construction grants. Sub-Recipient Agreements, when applicable, are also collected with the Pre-ROF Report.

CREATING A PRE-ROF REPORT

1. Select the Grant you need a Pre-ROF Report.
2. Click **Create a Pre-ROF Report** in the upper-right corner.

The screenshot displays the IN.gov Grant Administration CDBG interface. At the top, there is a navigation bar with links for Home, Account Details, Income Survey Requests, Grant Administrator Certification Requests, and Go to IN.gov. Below this, the user is logged in as 'Grant Administration CDBG'. A dropdown menu in the upper right corner contains three options: 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A blue arrow points to the 'Create A Pre-ROF Report' option.

The main content area shows details for a grant application. The 'Details' section is expanded to show 'Information'.

Lead Applicant	Program Name	Total Amount Awarded	Status
Coletta, Town of	WDW	\$285,000.00	Labor Release

The 'Information' section includes the following fields:

- Grant ID: G-00300
- Grant Number: WW-13-100
- Lead Applicant: Coletta, Town of
- Program Name: WDW
- National Objective:
- Summary of Work:
- Federal Employer ID #: SP-5555555
- Contact:
- Davis Beason Indicator:
- Account Name: Coletta, Town of
- Grant Application: ADM-2571
- Record Type: CDBG
- Program Year: 2021
- Contract Status:
- Initial Stage:
- Administration Modification Status:
- In Modification Process:
- Are Extensions available?:
- Region:
- Perform Use Type:
- Perform Use Monitoring Address:

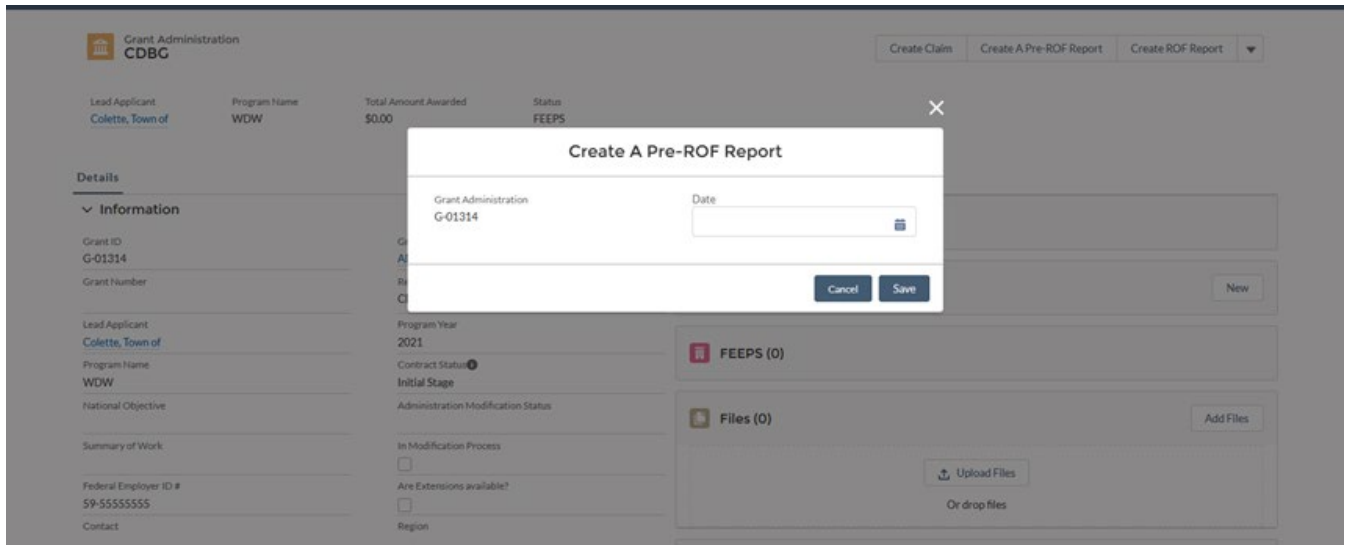
The 'Related' section shows 'Activities' with the following data:

Status Report Name	Record Type	Status	Date Submitted/Compl...
0005040	CDBG Pre-ROF	In Progress	
0005041	CDBG ROF	In Progress	8/12/2021
0005042	CDBG - Submitted ROF	Approved	8/12/2021
0005042	CDBG - Environmental R...		
0005043	CDBG - Environmental R...		
0005044	CDBG - Environmental R...	In Progress	

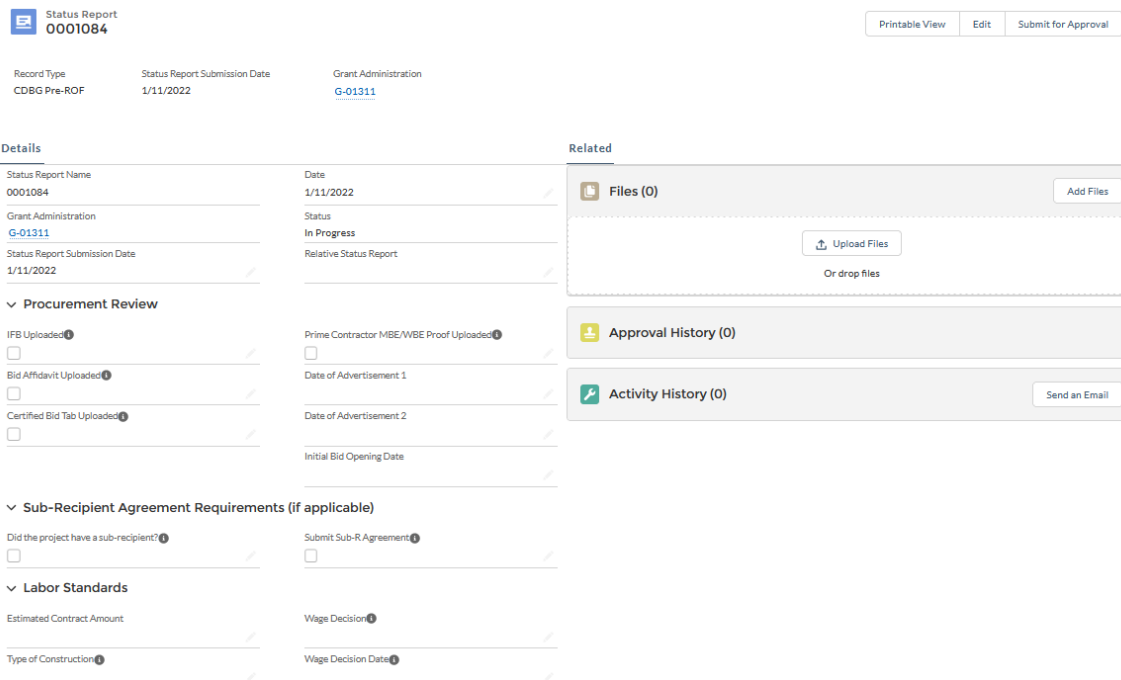
Below the 'Status Reports' table, there are sections for 'Grant Modifications (0)' and 'FEEPS (1)'. The 'FEEPS (1)' table shows one entry:

FEEPS Name	Approval Status	Property Requires Acq...	Number of properties in...
F-0259	New	<input type="checkbox"/>	

3. When the Create a Pre-ROF Report button is clicked, a box titled “Create A Pre-ROF Report” will appear.
4. Fill out the date, then click **Save**.



- a. When you click save, you will be given access to the Pre-ROF Status Report.



5. Fill out the procurement section of the report.
6. If the Sub-Recipient section are applicable, fill out the Sub-recipient fields and upload a signed copy of the Sub-R Agreement.
7. Complete the Labor Standards section of the report.

The screenshot shows a web form with two main sections: "Labor Standards" and "System Information".

Labor Standards Section:

- Estimated Contract Amount:** Text input field containing "\$1,500,000.00".
- Wage Decision:** Text input field containing "IN20210006 w/17 mods".
- Type of Construction:** Dropdown menu with "Heavy/Highway" selected.
- Wage Decision Date:** Date input field containing "8/3/2021".

System Information Section:

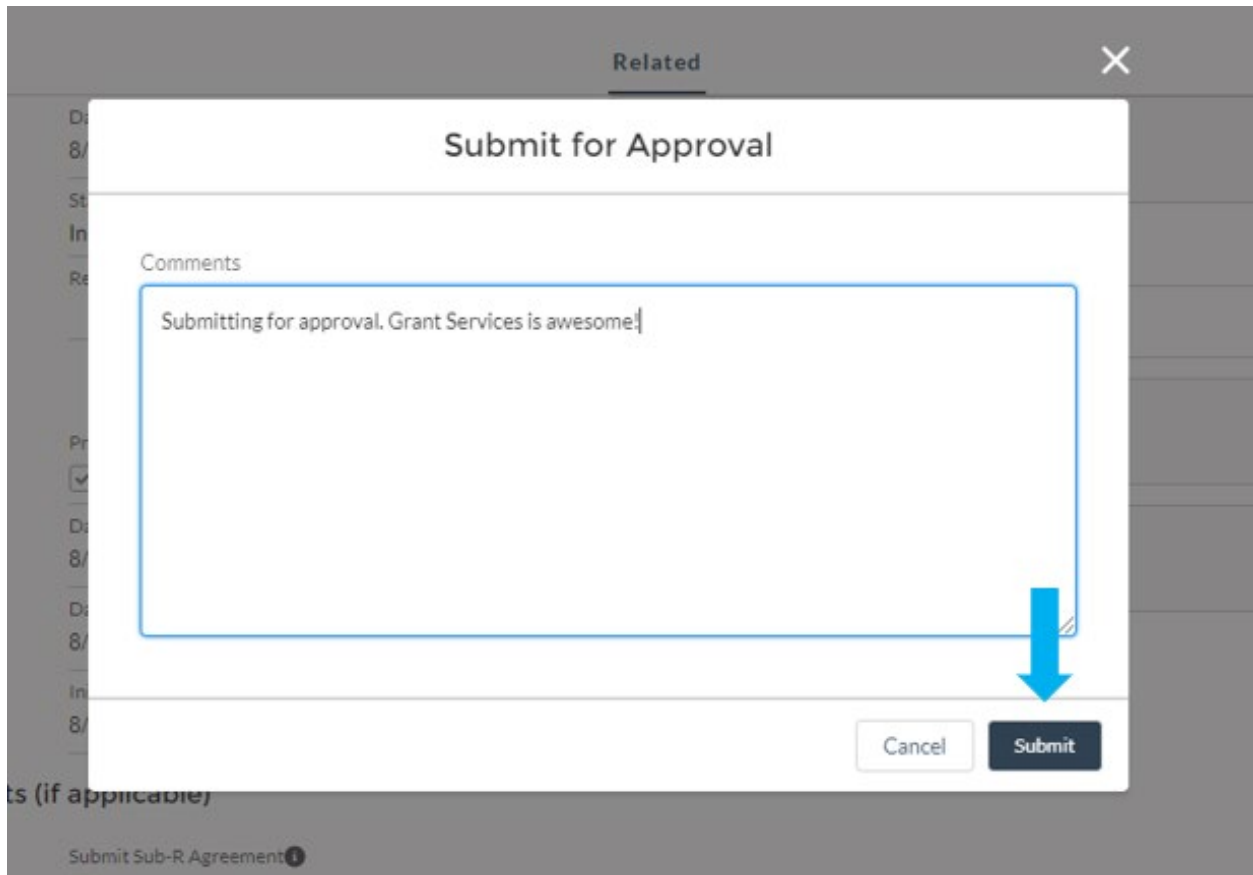
- Created By:** Tim Test Parthun, 8/19/2021 1:26 PM
- Owner:** Tim Test Parthun
- Record Type:** CDBG Pre-ROF
- Last Modified By:** Tim Test Parthun, 8/19/2021 1:26 PM

At the bottom of the form are two buttons: "Cancel" and "Save".

8. Once you have completed all the applicable fields, click **Save**.
9. Upload the Procurement and Sub-R documentation to the files section. Please follow the applicable instructions to upload on the Quick Start section of this guide.

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10. When you are finished filling out the report, click “Submit for Approval”. If you didn’t already click **Save** at the bottom of the report before submitting, please do so.
11. Enter any comments that you may have for Grant Services and hit **Submit** in the lower, right corner of the submission window.



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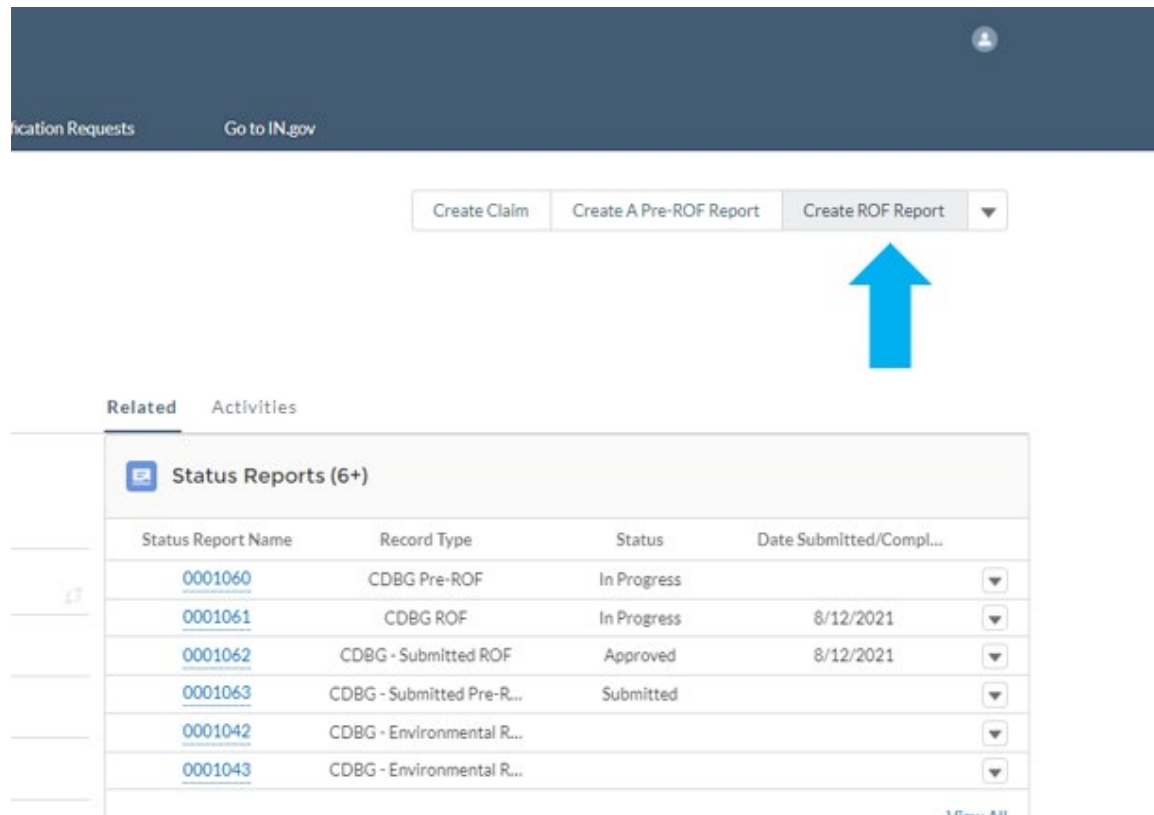
ROF

INTRODUCTION

The ROF Report is used to confirm final budgets, review all contracts, and establish the official wage determination and final labor standards information for the project.

CREATING A ROF REPORT

1. Select the Grant you need a ROF Report for.
2. Click **Create ROF Report** in the upper-right corner.



The screenshot shows the GMS interface. At the top, there is a dark blue header with a user profile icon and navigation links for 'Application Requests' and 'Go to IN.gov'. Below the header, there is a row of three buttons: 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A large blue arrow points upwards to the 'Create ROF Report' button. Below the buttons, there is a section titled 'Related Activities' with a sub-section 'Status Reports (6+)'. This section contains a table with the following data:

Status Report Name	Record Type	Status	Date Submitted/Compl...
0001060	CDBG Pre-ROF	In Progress	
0001061	CDBG ROF	In Progress	8/12/2021
0001062	CDBG - Submitted ROF	Approved	8/12/2021
0001063	CDBG - Submitted Pre-R...	Submitted	
0001042	CDBG - Environmental R...		
0001043	CDBG - Environmental R...		

At the bottom right of the table, there is a link that says 'View All'.

- a. A box will pop up on the screen that says, "Create a ROF Report."

3. Enter the date in the **Date Submitted/Completed** field.
4. Click save to begin the report.

The screenshot shows a 'Create ROF Report' modal form. The form includes the following elements:

- Certification of Professional Services?** (checkbox)
- Release Date** (date picker)
- All local match and commitment docs?** (checkbox)
- Date Submitted/Completed** (date picker)
- Additional Comments** (text area)
- Cancel** and **Save** buttons

Blue arrows indicate the steps: arrow '3.' points to the 'Date Submitted/Completed' field, and arrow '4.' points to the 'Save' button.

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SUBMITTING A ROF REPORT

1. Fill Out the **General Information** section. **Note:** The Budget Summary is pre-populated and should not require edits.

Status Report
0001064

Pri

Record Type
CDBG ROF

Status Report Submission Date
9/16/2021

Grant Administration
G-01303

Details

General Information

Grant Administration G-01303	Date Submitted/Completed 9/16/2021
Relative Status Report	Approval Status
Certification of Professional Services? ✎	All local match and commitment docs? ✎
<input type="checkbox"/>	Additional Comments ✎

Related

! Contractors (Status Report) (0)

+ Approval History (0)

+ Files (0)

Upload Files

Or drop files

+ Activity History (0)

Budget Summary

Total Amount Awarded \$385,000.00	Grant Administrator Total Amount \$0.00
Total Match \$140,000.00	Architect Total Amount \$0.00
Total Ineligible \$0.00	Engineer Total Amount \$0.00
Total Budget \$525,000.00	Construction Total Amount \$0.00

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2. Fill Out the **Labor Standards** or **Labor Form #** Sections of the report. Upload any applicable supporting documentation.

✓ Labor Form 3 - Pre-Bid Conference Sign-In Sheet

Pre-Bid Sign-In Sheet Uploaded? ⓘ

✓ Labor Form 4 - Pre-Bid Conference Guide Acknowledgement

Pre-Bid Conference Date

Current Wage Decision

Pre-Bid Conf Acknowledgment Language ⓘ

All parties have been advised that: 1. The Davis-Bacon Wage Determination that is in effect on the day of bid opening will be applicable to this project and will be, provided by an addendum to the bid specifications unless it can be justified that there was not sufficient time (72 hours) to provide the modified wage decision to prospective bidders. 2. If the contract is not awarded within 90 days of bid opening, the Davis-Bacon Wage Determination that is in effect on the date that contracts are signed becomes the applicable wage decision for the entire project. 3. It is understood that no change orders may be made as a result of increased wage rates, if applicable. 4. It is understood that the Pre-Bid Conference Guide explains the various requirements and regulations for construction projects funded in whole or in part with Community Development Block Grant (CDBG) funds awarded through the Indiana Office of Community and Rural Affairs (OCRA). The information contained in this Guide was addressed at the Pre-Bid meeting.

Pre-Bid Conference Certification ⓘ

✓ Labor Form 5 - Wage Determination Lock-In Notice

County

Bid Opening Date ⓘ

Wage Decision in effect on Bid Open Date ⓘ

90 Days From Bid Opening ⓘ

Do all parties understand that this is the applicable wage decision for the duration of this project as long as the construction contract is awarded within 90 days of bid opening? Check the box below if yes. Note: If the contract is not awarded within 90 days of bid opening, the wage decision that is in effect on the date the contract is executed becomes applicable to the entire project.

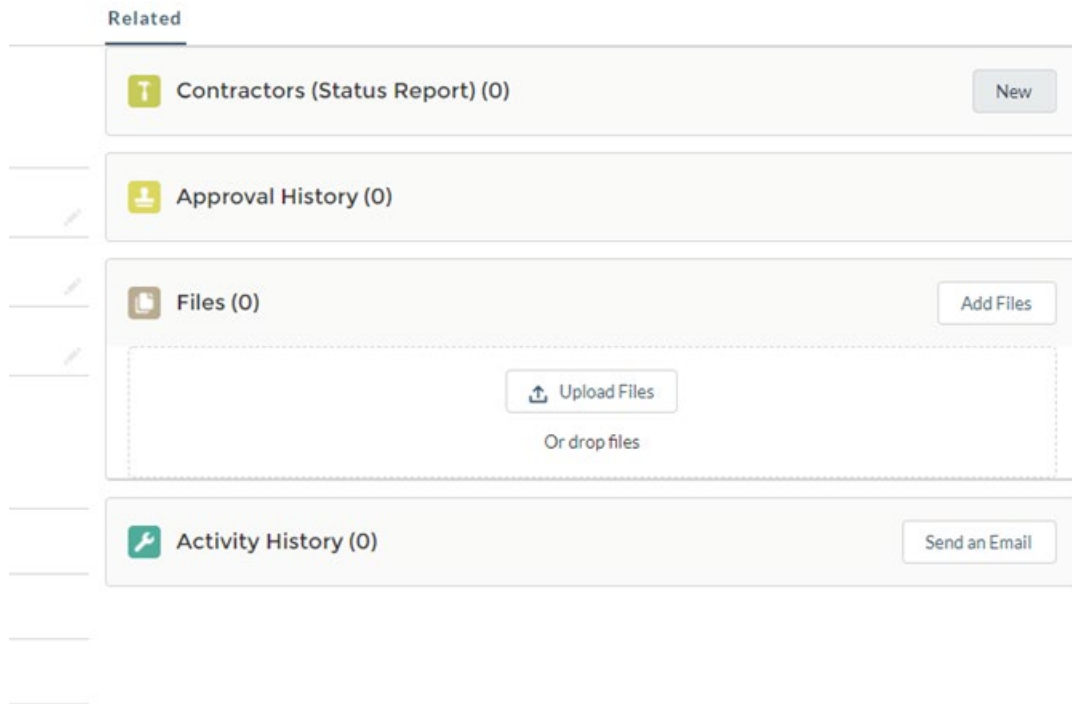
Wage Decision if no reasonable time ⓘ

All Parties Acknowledgment

Wage Decision Date ⓘ

OPENING A CONTRACTOR CARD

1. Click **New** in the widget titled, “Contractors (Status Report).”



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2. A box will pop up on the screen that is titled, “New Contractor: CDBG ROF.”

The screenshot shows a web form titled "New Contractor: CDBG ROF". The form is organized into two columns of fields. The left column includes fields for Contractor Name, Address 1, Address 2, City, State, Zip Code, Trade Code, Racial/Ethnic Code, and Women Business Enterprise (WBE). The right column includes fields for Status Report, Status, Record Type, Contractor FEID#, Contractor Type, Contract Amount, Date Signed, and Funding Source. There are also two checkboxes: "Was a copy of the contract provided?" and "Include Federal Third Party Provisions?". At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save". A blue arrow points to the "Save" button.

Field	Value
Contractor Name	ABC Construction Services, Inc.
Address 1	1 N Main Street
Address 2	
City	Pawnee
State	IN
Zip Code	47000
Trade Code	1 - New Construction
Racial/Ethnic Code	1 - White American
Women Business Enterprise (WBE)	No
Status Report	0001064
Status	--None--
Record Type	CDBG ROF
Contractor FEID#	35-1234567
Contractor Type	Prime Contractor
Contract Amount	\$788,000
Date Signed	9/15/2021
Was a copy of the contract provided?	<input checked="" type="checkbox"/>
Include Federal Third Party Provisions?	<input checked="" type="checkbox"/>
Funding Source	Grant & Local Funds

3. Complete the applicable information and all required fields in the Contractor Card. When done, hit **Save** in the bottom right corner of the Contractor Card.

4. For each Contractor Card, upload any procurement files and a copy of the contract.
5. After a Contractor Card has been created, it will appear in in the widget titled, “Contractors (Status Report).”

Related



Contractors (Status Report) (1)				New
Contractor Name	Contractor Category	Contractor Type	Contractor Name	
CON#-00392		Prime Contractor	asdf	▼
				View All

Approval History (2)				
Step Name	Date	Status	Assigned To	
Step 1	8/12/2021 10:06 AM	Recalled	Grant Services ▼	
Approval Request Sub...	8/12/2021 10:06 AM	Submitted	Tim Test Parthun ▼	
				View All

6. To navigate back to the ROF Report to upload files for other Contractor Cards or to submit the complete ROF Report, click on the Status Report ID #.




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 Contractor
CON#-00392

Details		Related
Contractor Name CON#-00392	Status Report 0001061	 Files (0)
Contractor Name asdf	Status	
Address 1 asdf	Record Type CDBG ROF	 Contractor H
Address 2	Contractor FEID# asdf	
City asdf	Contractor Type Prime Contractor	Date
State	Contract Amount	12/13/2021 11:1...

7. For assistance on uploading documents, please refer to the Quick Start Guide section of this document.

Related

-  Contractors (Status Report) (0) New
-  Approval History (0)
-  Files (0) Add Files

 Upload Files
Or drop files
-  Activity History (0) Send an Email

8. Once all uploads have been added to the status report, click save at the bottom of the report. Then, click Submit for Approval.
9. A box will pop up titled, "Submit for Approval."

Submit for Approval

Comments

Submitting for approval. Grant Services is awesome!

Cancel Submit

10. Enter any comments you may have for Grant Services.
11. Click Submit in the lower, right corner of the submission window.

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CONSTRUCTION RELEASE

INTRODUCTION

The Construction Release Report is an in-depth review of contractor/subcontractor verification and Davis-Bacon labor standards for the approval and release of construction funds.

SUBMITTING A CONSTRUCTION RELEASE REPORT

1. Select the Grant you need to submit a Construction Release report for.
2. Click the down arrow to see more options.
3. Select **Create CDBG Construction Release Report**.

The screenshot shows the Grant Administration CDBG interface. At the top, there are buttons for 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A blue arrow points to a dropdown menu that is open, showing several options: 'Create CDBG Construction Release Report', 'CDBG Semi-Annual Report', 'Create Sub-Recipient Semi-Annual', 'Start Closeout', 'New CDBG Environmental Review', and 'Create New Job Retention Business Report'. Below the dropdown, there is a table of 'Status Reports (4)' with columns for 'Status Report Name', 'Record Type', 'Status', and 'Date Submitted/Compl...'. The table contains four rows of data. Below the table, there is a section for 'Grant Modifications (0)' with a 'New' button.

- a. A screen will pop up that says, "Create CDBG Construction Release Report".

The screenshot shows a modal form titled 'Create CDBG Construction Release Report'. The form has a header with 'Amount Awarded' (50.00) and 'Status' (FEEPS). Below the header, there is a section for 'Grant Administration' with the value 'G-01311'. To the right of this section is a 'Date' field with the value '10/6/2021' and a calendar icon. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'.

4. Select the date.
5. Click Save.
 - a. A success message will appear at the top of the screen. You can now access the report.
6. Click on the **Status Report Name** (the blue underlined number) under “Status Reports” to open the Construction Release report.
7. Click on one of the pencil icons to begin filling out the report.
 - a. **The Construction Release report** will consist of information from the Labor Standards forms 6, 7, 8, 9, and 12.
 - b. Form 6 includes the SAM Registration and HUD Limited Denial screening, which should be uploaded in the files section.
8. Fill out the 4 fields under **Form 7: Notice of Contract Award** and the two fields under **Notice to Start Construction**.

Form 7: Notice of Contract Award


Type of Construction ⓘ	Bid Opening Date ⓘ
Heavy/Highway	9/1/2021
Contract Amount	Contract Signature Date
10,000.00	10/13/2021

Signed within 90 Days of Bid Open? ⓘ

9. Click **Save** at the bottom of the screen.
10. The **Signed within 90 Days of Bid Open** field will calculate the days between **Bid Opening Date** and **Contract Signature date** after you click **Save**.

Form 7: Notice of Contract Award

Type of Construction ⓘ	Bid Opening Date ⓘ
Heavy/Highway	9/1/2021
Contract Amount	Contract Signature Date
\$10,000.00	10/13/2021
Signed within 90 Days of Bid Open? ⓘ	
42	

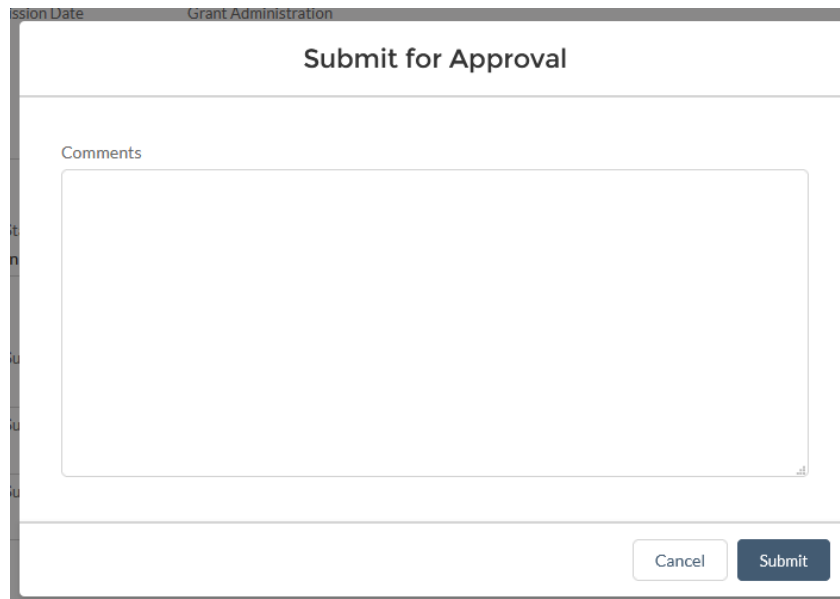


11. Upload a copy of Form 8, Form 9, and any supporting documents for wages or fringes under **Files**. Either click **Add Files** or drag the file over the **Upload Files** button.
12. After you have uploaded Form 8, Form 9 and any supporting documents, check the boxes to signify that.
13. Click **Save** at the bottom of the screen.
14. **If, and only if**, you have any additional contractors/subcontractors working on the project that were not reported in the ROF report, please add a contractor card for each of them. Do not duplicate contractor cards already created in ROF.
15. For each new Contractor Card created, upload the Wage/Fringe Certification, HUD Limited Denial Search, and any additional supporting documentation.
16. Click **New** to begin.

- a. It is very important that you fill in the **Status Report field**. This will be the same number of the Construction Release report you were just working on. You may receive a system error if you do not fill this out.
17. Fill out the remaining fields with the contractor's information.
 - a. You can leave **Status** blank.
 - b. Check the Minority Business Enterprise and/or the Women Business Enterprise boxes if applicable for the contractor.
 - c. For construction contractors, you do not need to fill out anything from **Solicitation Mailing** and below.

18. Click **Save**.
 - a. You will be brought back to the Construction Release report and have a success message at the top of screen.
19. Click Submit for Approval.

- a. A pop-up window will appear, allowing you to type any comments you may have for Grant Services.



Session Date Grant Administration

Submit for Approval

Comments

Cancel Submit

20. Type any comments or leave the comment section blank and click **Save**.
 - a. Once the report has been submitted, you will be taken to the completed report for your review.
21. Refresh the web page.
 - a. The status will now say "Submitted" and the Approval History will show it is "Pending" review.

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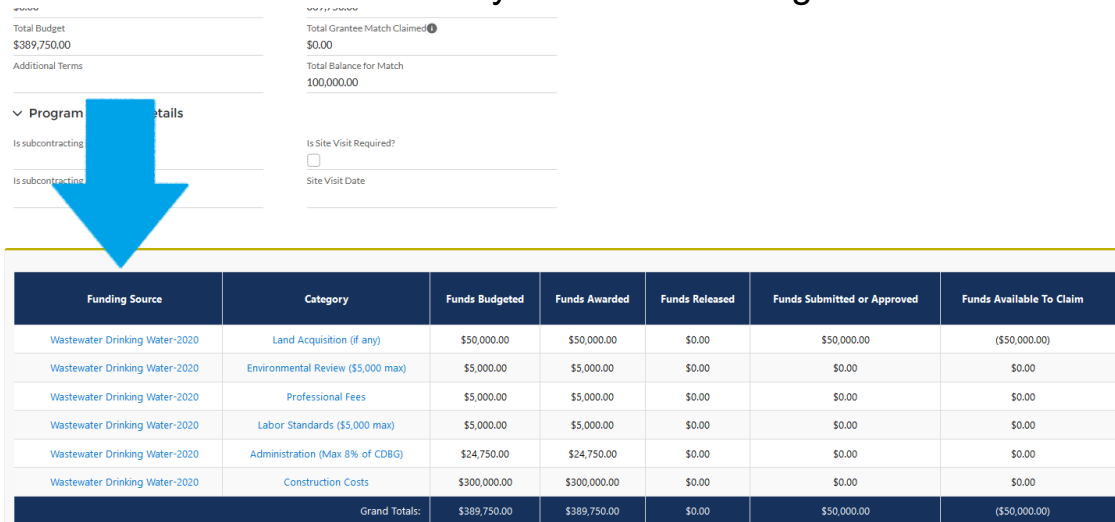
GMS CLAIMS INTRODUCTION

The purpose of a claim is to receive funds. Once a claim has been approved, a grantee will have five business days to spend the funds received. Claims are only permitted after Release of Funds. The Grant Administrator will receive notification. A letter is drafted, and the project is moved along in GMS. When your grant is closed, you will not be able to request any other additional funds.

Note: You will also need approval from the grantee before submitting a claim. Have the grantee send you an email stating their approval to submit this claim This Grantee Approval Email will be uploaded to the claim before submitting it.

SUBMITTING A CLAIM WITHIN THE GRANTS MANAGEMENT SYSTEM (GMS)

1. Select the grant you need to submit a claim for.
2. Scroll down to the bottom of the screen to review the budget table.
 - a. Review and note the year of the Funding Sources.



The screenshot shows a form with various fields. A large blue arrow points from the 'Program Details' section down to a budget table. The table has the following data:

Funding Source	Category	Funds Budgeted	Funds Awarded	Funds Released	Funds Submitted or Approved	Funds Available To Claim
Wastewater Drinking Water-2020	Land Acquisition (if any)	\$50,000.00	\$50,000.00	\$0.00	\$50,000.00	(\$50,000.00)
Wastewater Drinking Water-2020	Environmental Review (\$5,000 max)	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Professional Fees	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Labor Standards (\$5,000 max)	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Administration (Max 8% of CDBG)	\$24,750.00	\$24,750.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Construction Costs	\$300,000.00	\$300,000.00	\$0.00	\$0.00	\$0.00
Grand Totals:		\$389,750.00	\$389,750.00	\$0.00	\$50,000.00	(\$50,000.00)

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- b. Select a row you are wanting to submit a claim for and note it.

- i. When there are funds from multiple years of the same category, request funds from the oldest year first.
 - ii. Acquisition funds cannot be requested.
- c. Review and note the column titled “Funds Released.”

The screenshot shows a web browser window with the URL <https://gfull-indianaegms.cs32.force.com/Grants/s/grant/a02r000006APZHAA4/gd01311>. The interface includes a summary section with the following values:

- Total Ineligible Amount: \$0.00
- Total Budget: \$389,750.00
- Additional Terms: (empty)
- Total Balance: 389,750.00
- Total Grantee Match Claimed: \$0.00
- Total Balance for Match: 100,000.00

Below the summary is a section for "Program Specific Details" with checkboxes for "Is subcontracting permitted?" and "Is subcontracting allowed?". A large blue arrow points to a table below the details.

Funding Source	Category	Funds Budgeted	Funds Awarded	Funds Released	Funds Submitted or Approved	Funds Available To Claim
Wastewater Drinking Water-2020	Land Acquisition (if any)	\$50,000.00	\$50,000.00	\$0.00	\$50,000.00	(\$50,000.00)
Wastewater Drinking Water-2020	Environmental Review (\$5,000 max)	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Professional Fees	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Labor Standards (\$5,000 max)	\$5,000.00	\$5,000.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Administration (Max 8% of CDBG)	\$24,750.00	\$24,750.00	\$0.00	\$0.00	\$0.00
Wastewater Drinking Water-2020	Construction Costs	\$300,000.00	\$300,000.00	\$0.00	\$0.00	\$0.00
Grand Totals:		\$389,750.00	\$389,750.00	\$0.00	\$50,000.00	(\$50,000.00)

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- i. You will only be able to submit a claim for the Funds Released.
- ii. Verify if the row you are wanting to submit a claim has funds released available and note it.
- iii. If there are no funds available, contact Grant Services or verify if your account was closed.
- iv. If there are funds available, move to the next step.

3. Scroll back up to the top of the page to submit a claim.

4. Click on **Create Claim**.

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The screenshot shows the IN.gov Grant Administration CDBG interface. At the top, there is a navigation bar with links for Home, Account Details, Income Survey Requests, Grant Administrator Certification Requests, and Go to IN.gov. A blue arrow points to the 'Create Claim' button in the top right corner. Below the navigation bar, there is a summary card for the grant with the following information:

- Lead Applicant: Colette, Town of
- Program Name: WDW
- Total Amount Awarded: \$389,750.00
- Status: FEEPS

Below the summary card, there are three main sections:

- Details:** A section with a 'Information' sub-section containing fields for Grant ID (G-01311), Grant Number (-20-100), Lead Applicant (Colette, Town of), Program Name (WDW), National Objective, Summary of Work, Federal Employer ID # (59-5555555), and Contact.
- Related:** A section with three sub-sections:
 - Status Reports (4):** A table with columns for Status Report Name, Record Type, Status, and Date Submitted/Compl... It lists four reports: 0001065 (CDBG - Environmental R...), 0001066 (CDBG Construction Rel...), 0001067 (CDBG - Environmental R...), and 0001069 (CDBG - Environmental R...). A 'View All' link is present.
 - Grant Modifications (0):** A section with a 'New' button.
 - FEEPS (1):** A section with a 'New' button.
- Activities:** A section with a 'New' button.

- a. A screen will pop up that says, “Your Claim has now been Created.”

The screenshot shows the IN.gov Grant Administration CDBG interface with a 'Create Claim' modal dialog box open. The dialog box has a title bar that says 'Create Claim' and a close button (X). The main content of the dialog box says 'Your Claim has now been created.' and there is a 'Finish' button below it. The background content is dimmed, showing the same summary card and sections as in the previous screenshot.

5. Click **Finish**.
6. Fill in the **Grantee Match** field.

Claims
CL-04216

Amount Requested \$0.00 Amount Approved \$0.00 Status New

Details

* Grantee Match

CATEGORY	FUNDS AWARDED	FUNDS RELEASED	FUNDS CLAIMED	FUNDS REMAINING	FUNDS REQUESTED
CBC-5824 - Land Acquisition (If any)	\$50,000.00	\$0.00	\$0.00	\$50,000.00	\$0.00
CBC-5825 - Environmental Review (\$5,000 max)	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00
CBC-5826 - Professional Fees	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00
CBC-5827 - Labor Standards (\$5,000 max)	\$5,000.00	\$0.00	\$0.00	\$5,000.00	\$0.00
CBC-5828 - Administration (Max 8% of CDBG)	\$24,750.00	\$0.00	\$0.00	\$24,750.00	\$0.00
CBC-5829 - Construction Costs	\$300,000.00	\$0.00	\$0.00	\$300,000.00	\$0.00



- a. Total all the match dollars for all the funds you will be requesting and put that amount in the box.
- b. Be sure that you only request funds on categories that have funds released. (You would not be able to request funds for Acquisition)

7. Read and Check the Affirmation checkbox.

Federal Grants: By signing this report, I certify to the best of my knowledge and belief that the report is true, complete and accurate and the expenditures, disbursements and cash receipts are for the purposes set forth in the terms and conditions of the federal award. I am aware that any false, fictitious, or fraudulent information or the omission of any material fact, may subject me to criminal, civil, or administrative penalties for fraud, false statements, false claims, or otherwise.

State Grants: Pursuant to the provisions and penalties of Indiana Code 5-11-10-1, I hereby certify that the foregoing Fund and Account is just and correct, that the amount claimed is legally due, after allowing all just credits, and that no part of the same has been paid.



8. If any items are incorrect, you will not be able to submit.
9. The incorrect items will be listed for you to know what to change.
10. Email the grantee and request an approval to submit the claim.
 - a. Copy the email via any of the following file types
 - i. JPEG;
 - ii. PDF;
 - iii. Word Doc; or
 - iv. Etc.
 - b. Click **Add Files** to upload it.
 - c. When the claim has been approved, the status will update and will say, "Approved".

SEMI-ANNUAL REPORT

INTRODUCTION

The purpose of the Semi-annual Report is to provide updates on the status of the project and must be submitted by the Grantee. The semi-annual reporting requirement begins when the Grantee receives a copy of the fully executed grant agreement from Grant Services and continues until the Grantee has reached financial and administrative closeout of the grant. Claim vouchers will not be processed and no additional funds will be awarded if semi-annual reports are delinquent.

SUBMITTING THE SEMI-ANNUAL REPORT

1. Select you the grant you need to create a Semi-Annual Report for.
2. At the top of the page, select **CDBG Semi Annual Report** from the drop-down list on the upper right side of the screen.

The screenshot displays the Grant Administration CDBG interface. At the top right, there is a navigation bar with buttons for 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A dropdown menu is open, showing several options, with 'Create CDBG Semi-Annual Report' highlighted. A blue arrow points to this option. Below the navigation bar, there is a summary section with fields for 'Lead Applicant' (Colette, Town of), 'Program Name' (WDW), 'Total Amount Awarded' (\$389,750.00), and 'Status' (FEPS). The main content area is divided into 'Details' and 'Related' sections. The 'Details' section includes 'Information' with fields for Grant ID, Grant Number, Lead Applicant, Program Name, and National Objective. The 'Related' section includes 'Status Reports (4)' with a table of reports and 'Grant Modifications (0)' with a 'New' button.

Status Report Name	Record Type	Status	Date Submitted/Compl...
0001065	CDBG - Submitted Envir...	Submitted	
0001066	CDBG Construction Rel...	In Progress	
0001067	CDBG - Submitted Envir...	Submitted	
0001069	CDBG - Environmental R...		

- a. The **CDBG Semi-Annual Report** will appear.
- b. Fill out the four required boxes of information.

CDBG Semi-Annual Report

<p>* Report Preparer</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> <input style="width: 90%;" type="text" value="Search Contacts..."/> 🔍 </div>	<p>Date</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; align-items: center;"> <input style="width: 90%;" type="text" value="10/6/2021"/> 📅 </div>
<p>* Status Update ⓘ</p> <div style="border: 1px solid #ccc; height: 40px; width: 100%;"></div>	<p>* Estimated % of Project Completed ⓘ</p> <div style="border: 1px solid #ccc; height: 30px; width: 100%;"></div>

Cancel
Save

- c. Click **Save**.
 - i. To assist with ease of development, utilize Word (or other text application) when drafting language for Status Update.
 - ii. At the top of the screen in a green box the message, “Status Report ##### was created,” will appear to confirm successful completion of the **semi-annual report**.
3. Information entered in the report will appear in a screen.
4. A **Files** window appears on the right side of the **status report**.
5. Upload the new Section 3 Report form there.
6. When you have finished filling out the report, you can hit the **Submit for Approval** button in the top right of the page.
 - a. A pop-up window will appear, allowing you to type any comments you may have for Grant Services.

Submit for Approval

Comments

Cancel

Submit

7. Type any comments or leave the comment section blank and click **Save**.
 - a. Once the report has been submitted, you will be taken to the completed report for your review.
8. Then Grant Services will review the report.

Status Report
0001073

Record Type
CDBG

Status Report Submission Date
10/6/2021

Grant Administration
[G-01311](#)

Edit Clone Submit for Approval



9. To verify the report was successfully submitted, you can check the status field under **General Information**.
10. You can also check the status of a report by selecting **Status Reports** on the right side of the Grant Administration page. This takes you to a full list of status reports and their current status.

SUB-RECIPIENT SEMI-ANNUAL REPORT

INTRODUCTION

The purpose of the sub-recipient Semi-Annual Report is to monitor the performance of the Subrecipient during the five-year period to ensure that the federally assisted facility continues to meet all of the stated grant goals and objectives.

Whenever a Subrecipient is involved in the federally assisted project, a Subrecipient semi-annual report must be submitted for a period of five years after administrative closeout of the grant. The Subrecipient reporting requirement begins when the Grantee's semi-annual reporting period ends, at administrative closeout.

SUBMITTING THE SUB-RECIPIENT SEMI ANNUAL REPORT

1. Select the grant you need to submit a sub-recipient semi-annual report for.
2. At the top of the page, click the drop-down arrow and select Create Sub-Recipient Semi- Annual.

The screenshot displays the Grant Administration CDBG interface. At the top right, there are buttons for 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A dropdown arrow is visible next to the 'Create ROF Report' button. A blue arrow points to the dropdown menu, which is open and shows the following options: 'Create CDBG Construction Release Report', 'CDBG Semi-Annual Report', 'Create Sub-Recipient Semi-Annual', 'Start Closeout', 'New CDBG Environmental Review', and 'Create New Job Retention Business Report'. Below the dropdown, the 'Status Reports (4)' section is visible, containing a table with the following data:

Status Report Name	Record Type	Status	Date Submitted/Compl...
0001065	CDBG - Submitted Envir...	Submitted	
0001066	CDBG Construction Rel...	In Progress	
0001067	CDBG - Submitted Envir...	Submitted	
0001069	CDBG - Environmental R...		

Below the table, there is a 'View All' link. At the bottom of the interface, the 'Grant Modifications (0)' section is visible with a 'New' button.

3. Select the National Objective.

The screenshot shows a modal window titled "Create Sub-Recipient Semi-Annual". Inside the window, there are two main sections: "Grant Administration" with the value "G-01311" and "National Objective" with a dropdown menu showing "LMI Persons - Area Wide Basis". At the bottom right of the window, there are two buttons: "Cancel" and "Save". The background shows a table with columns for "Amount Awarded", "Status", and "Report Number".

4. Click **Save**.
 - a. A message will state the Sub-Recipient Semi-Annual Report has been created.
 - b. Click on the underlined report number to open it.

5. Fill out the contact information with whomever you work with at the Sub-Recipient organization, along with the physical address of the organization.
6. Provide any updates on the Sub-Recipient's grant progress or activities in **Describe the Event/Project**.

▼ **Project Information**

Project Name 23	Certificate of Completion Date
Describe the Event/Project	End of Reporting Period
Certificate of Insurance Uploaded <input type="checkbox"/>	

7. Upload a copy of the Sub-Recipient's Certificate of Insurance for the building/property.
 - a. To upload the Certificate of Insurance, click on **Add Files** in the upper right of the screen and select a file to upload or drag and drop the file over the **Upload Files** button.

8. Once uploaded, check the box under **Certificate of Insurance Uploaded.**

▼ Project Information

Project Name

23

Describe the Event/Project

Certificate of Insurance Uploaded



Certificate of Completion Date

End of Reporting Period

9. Enter the beneficiaries total for the project.
- The number from the Final Beneficiaries is supplied above.
 - Often these numbers are the same.
10. Read the **Grantee & Sub- Recipient Certification.**
- Check the box below to certify it.
 - You may need to inform or remind the Sub-Recipient of these responsibilities.
11. Click **Submit for Approval** button at the top right of the screen.

IN.gov

Home Account Details Income Survey Requests Grant Administrator Certification Requests Go to IN.gov

Status Report
0001070

Edit Printable View **Submit for Approval**

Record Type: CDBG Sub-Recipient Semi-Annual
Status Report Submission Date: 10/6/2021
Grant Administration: [G-01311](#)

- A pop-up window will appear, allowing you to type any comments you may have for Grant Services.

Submit for Approval

Comments

Cancel

Submit

12. Type any comments or leave the comment section blank and click **Save**.
 - a. Once the report has been submitted, you will be taken to the completed report for your review.

CLOSEOUT PROCESS

INTRODUCTION

The closeout process is the final phase of the Community Development Block Grant (CDBG) project administration. It is the responsibility of the Grantee, with the assistance of the grant administrator, to initiate the closeout process no later than 30 days after project completion and the last CDBG claim has been processed. (If CDBG funds were simply used for the acquisition of property, the Grantee should wait to initiate the closeout process until the project is complete and all stated objectives have been met.)

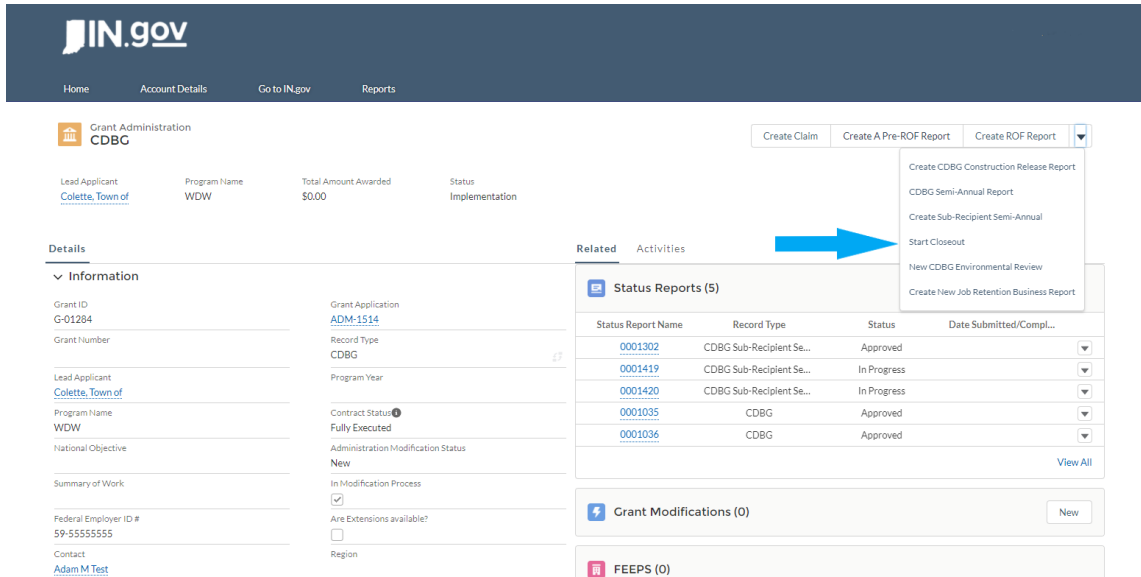
COMPLETING THE CLOSEOUT PROCESS

1. On the Grant Administration page, click the drop-down arrow in the upper right-hand corner of the page.

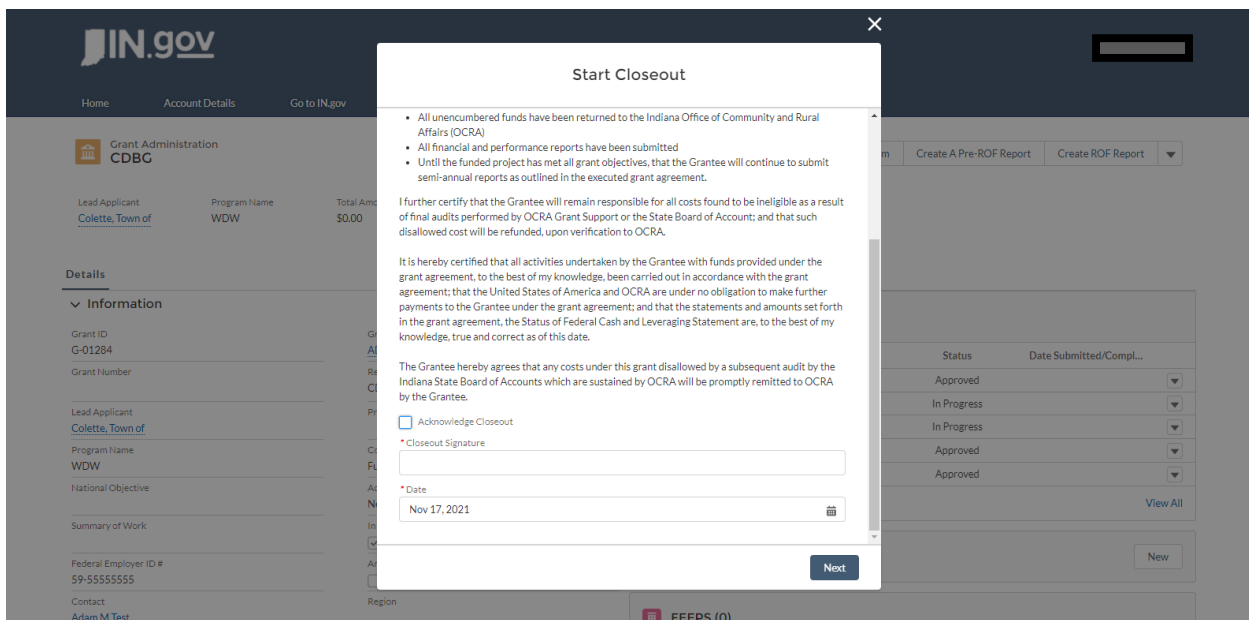
The screenshot shows the IN.gov Grant Administration page for a CDBG grant. The page includes a navigation bar with 'Home', 'Account Details', 'Go to IN.gov', and 'Reports'. Below the navigation bar, there are buttons for 'Create Claim', 'Create A Pre-ROF Report', and 'Create ROF Report'. A blue arrow points to a drop-down arrow in the top right corner of the page. The main content area is divided into 'Details' and 'Related' sections. The 'Details' section includes 'Information' and 'Contract Status' fields. The 'Related' section includes 'Status Reports (5)', 'Grant Modifications (0)', and 'FEEPS (0)'. The 'Status Reports (5)' table lists five reports with their names, record types, statuses, and dates.

Status Report Name	Record Type	Status	Date Submitted/Compl...
0001302	CDBG Sub-Recipient Se...	Approved	
0001419	CDBG Sub-Recipient Se...	In Progress	
0001420	CDBG Sub-Recipient Se...	In Progress	
0001035	CDBG	Approved	
0001036	CDBG	Approved	

2. After clicking the drop-down arrow a list of options will appear. Choose 'Start Closeout'.

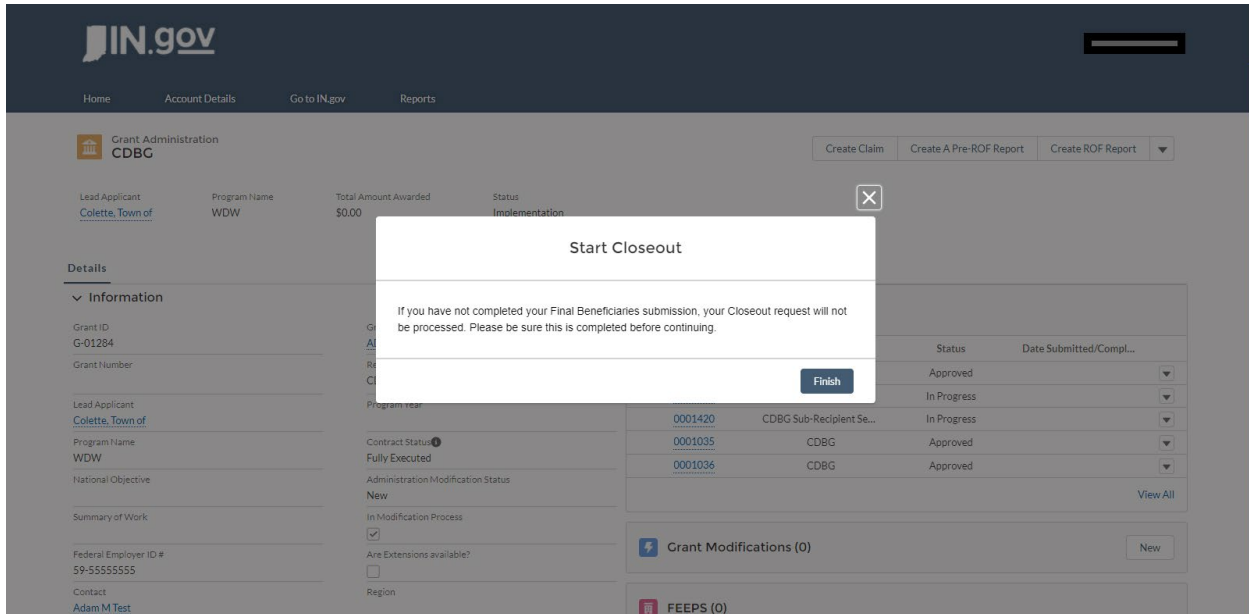


3. **(If Final Beneficiaries has been completed):** A window certifying the grant close out will pop up (pictured below). The Grant Administrator will check the box for 'Acknowledge Closeout' and sign by typing their name in the text box. Then click next.

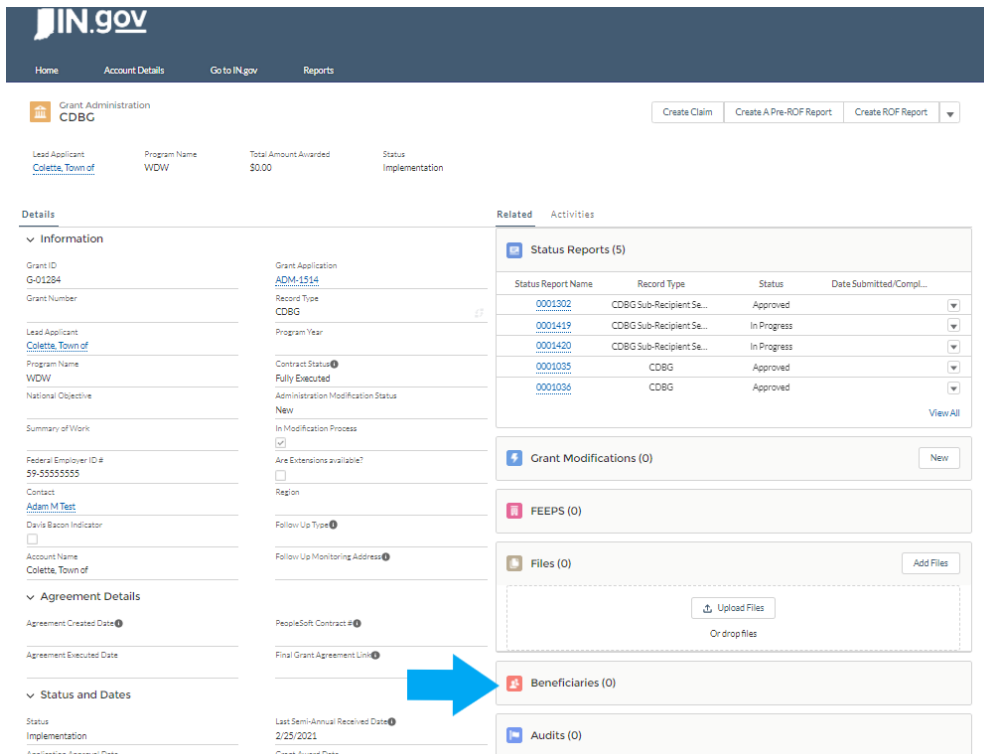


4. **(If Final Beneficiaries has NOT been completed):** A window stating that the closeout request cannot be processed without the Final Beneficiaries will pop up (pictured below). This closeout process

will not be able to move forward until the Final Beneficiaries record is complete.



5. Once you are able to identify the final beneficiaries, you can enter them in the area labeled **Beneficiaries** and finalize the closeout process.



INCOME SURVEY

INTRODUCTION

The purpose of an income survey is to determine whether the service area of a proposed activity meets the LMI (Low – Moderate Income) Area Benefit National Objective criteria. It provides local CDBG Grant Administrators and applicants who have no substantial survey research background with the basic survey techniques to make a determination of the income status of residents in the service area. The Area-Wide Benefit category is the most commonly used National Objective for CDBG-funded activities. Income surveys are used to ensure that at least 51% of the residents in the service area, who will benefit from the project, live in households earning 80% or less that the area's Median Family Income as determined by HUD.

A request to conduct an Income Survey should only be initiated for one of the following reasons:

- The census boundaries do not coincide sufficiently with the service area of the activity to use census data and the service area does not qualify by Census using the HUD Mapping Tool.

or

- The applicant believes the HUD LMISD (Low to Moderate Income Summary Data) does not reflect current relative income levels in an area...i.e., the margin of error of the LMI of the service area is reasonably inaccurate or different when compared to the HUD census data. Reasonable justification for why the HUD census data is inaccurate must be provided and signed by the community's CEO, along with a map of the service area and its boundaries.

SUBMITTING AN INCOME SURVEY REQUEST

1. After logging into GMS, scroll down on the home page.

Request to Conduct New Income Survey

*Community

*Geography Type

*List Units of Geography

*LMI Based on HUD Mapping Tool

*Total Number of Geographic Units

Service Area Conforms to HUD Boundary

2. Then, fill each of the boxes based on the community and its service areas.
 - a. **Search the community** that is requesting to conduct an Income Survey. If you are unable to find the community, please contact the Community Liaison and request that the community's information be added.
 - b. Then, **enter the geography type needed**. This will vary based on the survey area and the total number of low to moderate income individuals in the service area.
 - i. The available geography types are the following:
 1. Place (City or Town)
 2. Block Group
 3. County Subdivision (Township)
 4. County
 - c. **Enter the exact percentage of low to moderate income individuals within the service area using the [HUD Mapping Tool](#)**. Round to the second decimal place. For EX: 53.91.
 - d. **Enter the name of the geographic units that fit within the service area**. For EX. If the income survey is for the town limits only, enter "the name of the community." If the Income Survey involves several block groups, list out the exact block group number from the HUD Mapping Tool in this box. For EX. "Block group 6 and Block group 7."
 - e. **Enter the total Number of Geographic Units**. For EX. If the service area is only within the town's limits, enter "1." If the service area involves block groups, enter the total number of block groups.

f. Select the box if it the service area conforms to the HUD boundaries.

- i. Conforms to HUD boundaries means the service area aligns with a particular geography (e.g., town limits or the boundaries of the blocks groups used). For EX. “The City of Colette.”

Request to Conduct New Income Survey

* Community

* Geography Type

* LMI Based on HUD Mapping Tool ⓘ

* List Units of Geography ⓘ

* Total Number of Geographic Units

Service Area Conforms to HUD Boundary ⓘ

Next

3. When finished, click **Next**. Then, a second box will appear. This is where you will upload the justification letter and the map of the service area.

- i. Note: When uploading documents, make sure to title them appropriately using easy to understand naming conventions. For Ex: “Justification Letter for Town of Colette.”

Request to Conduct New Income Survey

Service Area Map
 Or drop files

Justification Letter
 Or drop files

Submit

4. After uploading, click **Submit**.
 - i. Note: The screen will not change after each document is uploaded.

6. Once the submit button is clicked, the screen will change. Then, click finish.

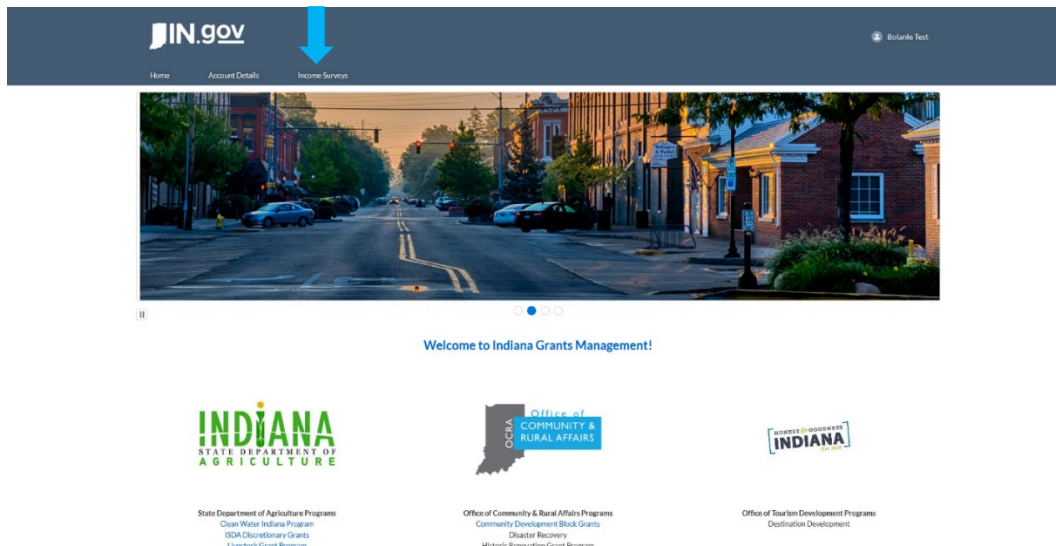
Request to Conduct New Income Survey

Thank you for submitting your income survey request! Please expect a response from OCRA within 10 business days.

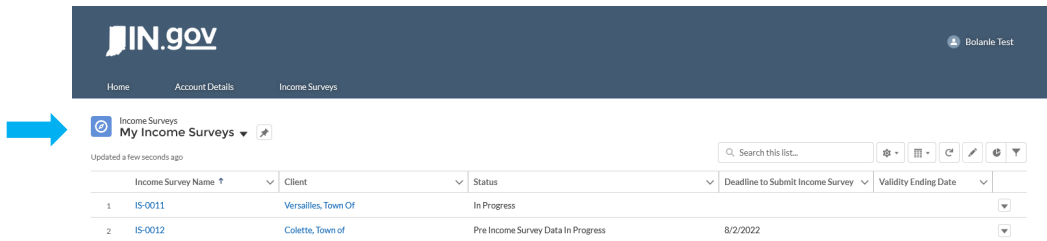


FINDING AN INCOME SURVEY IN GMS

1. Log into GMS.
2. Click the **Income Surveys** tab on the **GMS Navigation Menu**.



3. After clicking the **Income Surveys** tab, a list of Income Surveys will appear. Once the corresponding IS-#### is clicked, the corresponding page will appear based on its status.



IN.gov Bolanle Test

Home Account Details Income Surveys


Income Surveys My Income Surveys

Updated a few seconds ago

Search this list...

	Income Survey Name	Client	Status	Deadline to Submit Income Survey	Validity Ending Date
1	IS-0011	Versailles, Town Of	In Progress		
2	IS-0012	Colette, Town of	Pre Income Survey Data In Progress	8/2/2022	

4. Use the dropdown, to toggle between the **My Income Surveys** view and the **Recently Viewed** view.



IN.gov Bolanle Test

Home Account Details Income Surveys

Income Surveys Recently Viewed

Updated a few seconds ago

Search this list...

	Income Survey Name
1	IS-0012
2	IS-0011

Note: This is also where you can view the status of your Income Surveys. The statuses in eGMS for Income Surveys are as follows:

- a. Denied
 - i. If this status is initiated, the Income Survey information cannot be edited, and a new Income Survey Request will need to be created.
- b. Request Submitted for Review
 - i. If this status is initiated, a CDBG program manager is reviewing the Income Survey Request.
- c. Pre-Income Survey Data in Progress
 - i. If this status is initiated, a CDBG program manager has approved your request to conduct an Income Survey. You should enter the calculations for the number of individuals to survey for OCRA approval and submit it prior to making first contact for your income survey.
- d. Pre-IS Data Submitted for Review

- i. If this status is initiated, a CDBG Program Manager/ member of Grant Services is reviewing your Pre-Income Survey Data.
- e. Income Survey in Progress
 - i. If this status is initiated, a CDBG Program Manager/ member of Grant Services has approved your Pre-Income Survey Data. And you should begin conducting the income survey.
- f. Income Survey Results Submitted for Approval
 - i. If this status is initiated, a CDBG Program Manager/ member of Grant Services is reviewing the results of the Income Survey.
- g. Income Survey Approved
 - i. If this status is initiated, a CDBG Program Manager/ member of Grant Services has approved your Income Survey data.

Note: You can also find an Income Survey via Email. A confirmation email will be sent out to you with an approval/ denial email at each step with an active direct link to it. Double check spam folders to make sure that the system notification is in your email inbox.

SUBMITTING THE PRE-INCOME SURVEY DATA

1. After an Income Survey Request is submitted, it will then be approved or denied. If denied, a new request will need to be created. If approved, the next step will be to fill out the pre-income survey data.
2. After an Income Survey request has been approved, find the **Pre-Income Survey Data** page by following the steps on this page. If denied, OCRA will reach out to you with next steps.

IN.gov Bolanie Test

Home Account Details Income Surveys

Income Survey IS-0014 Submit for Approval Update Record

Details

Status: Pre Income Survey Data In Progress

Custom Service Area

Household in Service Area (Custom SA)

Houses Inside Larger Geography: 0

People Inside Larger Geography

Estimated number of People Per Household

Est. Population for Custom Service Area

Estimated Number of Households to Survey

Service Area Conforms to HUD Boundary

Houses in Service Area

LOW/MOD/UNIV or Population Service Area

People Per Household

Est # of Households to Survey

Final Calculations

Final Number of People to Survey

Income Limits

County of Metro Stats Area Used

1 Person @ 80% 2 Person @ 80%

3 Person @ 80% 4 Person @ 80%

5 Person @ 80% 6 Person @ 80%

7 Person @ 80% 8 Person @ 80%

Related

Files (2) Add Files

Justification Letter May 9, 2022 • 14KB • docx	Map of Service Area May 9, 2022 • 14KB • docx
---	--

[View All](#)

Approval History (2)

Step Name	Date	Status	Assigned To
Request to Conduct IS ...	5/9/2022 10:35 AM	Approved	Bolanle Oladokun
Approval Request Sub...	5/9/2022 10:31 AM	Submitted	Bolanle Test

[View All](#)

3. **Fill out the corresponding data field based on the service area by clicking update record.** If the Service Area conforms to the HUD boundaries and it was selected on the initial request, the data for that field will be filled out **ONLY** instructions on how to fill out this information can be found on **this page**. If the service area is a custom service area, the data for that field will be populated **ONLY**. Instructions on how to fill out this information can be found on **page 66**. As your following these steps, it is important to keep the Income Survey manual located on the CDBG Resources page close by to ensure compliance with these steps.
 - a. **Option 1: The Service Area conforms to the HUD Boundary.**
 - i. Click “Update Record.”

IN.gov

Home Account Details Income Surveys

Income Survey IS-0023

Submit for Approval Update Record

Details

Status
Pre Income Survey Data In Progress

Custom Service Area

Household In Service Area (Custom SA)

Houses Inside Larger Geography
0

People Inside Larger Geography

Estimated number of People Per Household

Estimated Number of Households to Survey

Related

Files (0) Add Files

Upload Files

Or drop files

Approval History (2)

Step Name	Date	Status	Assigned To
Request to Conduc...	5/20/2022 1:17 PM	Approved	Bolanle Oladokun
Approval Request S...	5/20/2022 1:15 PM	Submitted	Bolanle Test

- ii. Once “Update Record” is selected a box will appear.
- iii. First, fill out the following:
 - a. Population of the Service Area – This is the LOWMODUNIV for the area found in the HUD Mapping Tool.
 - b. Number of Households in the Service – This is the number of households based on the place data in [census.gov](https://www.census.gov)
 - c. When you’re done entering this data, click next. Note: This will not save your information. If you exit out at any time, you will need to restart the Pre-Income Survey Data process over.

IN.gov

Home Account Details Income Surveys

Income Survey IS-0023

Submit for Approval Update Record

Details

Status Pre Income Survey Data In Progress

Custom Service Area

Household In Service Area (Custom SA)

Houses Inside Larger Geography

People Inside Larger Geography

Estimated number of People Per Household

Estimated Number of Households to Survey

Update Record

* Population of the Service Area 12,740

Number of Households Inside Service Area 5,166

Next

Approval History (2)

Step Name	Date	Status	Assigned To
Request to Conduct...	5/20/2022 1:17 PM	Approved	Bolanle Oladokun
Approval Request S...	5/20/2022 1:15 PM	Submitted	Bolanle Test

- iv. After **Next** is clicked, the screen will prompt you with the population value field for the Income Survey calculator. Calculate the number of people to survey utilizing the [Survey Monkey Sample Size Calculator](#). The margin of Error for the community can be found on the CDBG Resources page.

IN.gov

Home Account Details Income Surveys

Income Survey IS-0023

Submit for Approval Update Record

Details

Status Pre Income Survey Data In Progress

Custom Service Area

Household In Service Area (Custom SA)

Houses Inside Larger Geography

People Inside Larger Geography

Estimated number of People Per Household

Estimated Number of Households to Survey

Service Area Conforms to HUD Boundary

Houses in Service Area

Update Record

Please use this value for the Population field for the Survey Monkey Calculator

12,740

Previous Next

Approval History (2)

Step Name	Date	Status	Assigned To
Request to Conduct...	5/20/2022 1:17 PM	Approved	Bolanle Oladokun
Approval Request S...	5/20/2022 1:15 PM	Submitted	Bolanle Test

- v. Then, find the number of people to survey, screenshot your results and save them on your computer. Then, click

- vi. **Next.** enter this data and upload the results and click **Next.** **Note:** The screen will not change once you upload.

Update Record

* Final Number of People to Survey based on Survey Monkey Calculator

97

Screen Shot of Survey Monkey Results

Upload Files Or drop files

Previous **Next**

- vii. After clicking **Next**, enter the Income Limits for the area. The Income Limits can be found on the CDBG Resources page under the Income Survey Information header. When finished entering the information, click **Next**.

Update Record

Please use the income limits for the date in which you will START your income survey. Income Surveys are considered started at the point of first contact. You can find the most recent Income Limit Data on [OCRA's CDBG Resources Page](#).

* County or Metro Statistical Area Used

Town of Colette MSA

* 1 Person at 80%	* 2 Person at 80%
30,000	40,000
* 3 Person at 80%	* 4 Person at 80%
50,000	60,000
* 5 Person at 80%	* 6 Person at 80%
70,000	80,000
* 7 Person at 80%	* 8 Person at 80%
90,000	100,000

Previous **Next**

- viii. After clicking Next, the information provided will be saved and will show up in the Service Area Confirms to HUD boundary section of the Pre-Income Survey Data Request page.

Service Area Confirms to HUD Boundary

Houses in Service Area ⁱ

5,166

LOWMODUNIV or Population Service Area ⁱ

12,740

People Per Household

2.47

Est # of Households to Survey

39

Final Calculations

Final Number of People to Survey ⁱ

97

Income Limits

County of Metro Stats Area Used ⁱ

Town of Colette MSA

1 Person @ 80%

30,000

2 Person @ 80%

40,000

3 Person @ 80%

50,000

4 Person @ 80%

60,000

5 Person @ 80%

70,000

6 Person @ 80%

80,000

7 Person @ 80%

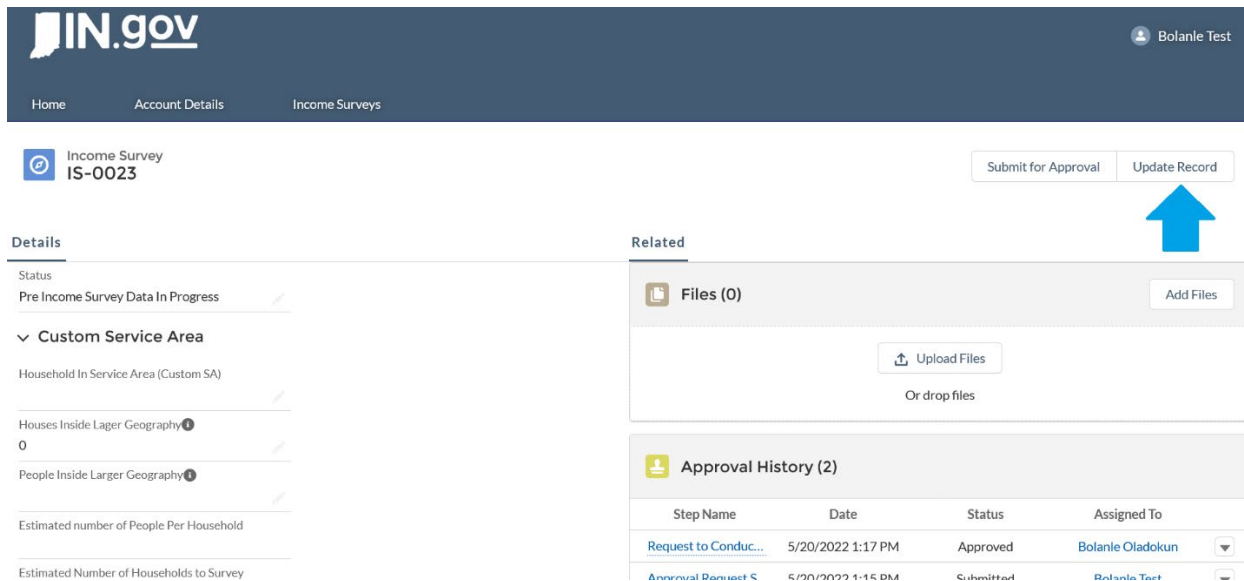
90,000

8 Person @ 80%

100,000

- ix. Then, confirm the information. Once the information is confirmed skip to step 3 of this process to Submit the Pre-Income Survey Data Request on **page 66**.

- b. Option 2: Fill out the data for a Custom Service Area:**
- i. First, click “Update Record.”



The screenshot shows the IN.gov Income Survey IS-0023 interface. The 'Update Record' button is highlighted with a blue arrow. The 'Details' section shows 'Pre Income Survey Data In Progress' and 'Custom Service Area' with fields for 'Household In Service Area (Custom SA)', 'Houses Inside Larger Geography' (0), 'People Inside Larger Geography' (0), 'Estimated number of People Per Household', and 'Estimated Number of Households to Survey'. The 'Related' section shows 'Files (0)' and 'Approval History (2)' with a table of steps.

Step Name	Date	Status	Assigned To
Request to Conduct...	5/20/2022 1:17 PM	Approved	Bolanle Oladokun
Approval Request S...	5/20/2022 1:15 PM	Submitted	Bolanle Test

- ii. Once “Update Record” is selected a box will appear.
- iii. Then fill out the following utilizing [census.gov](https://www.census.gov) and the [HUD Mapping Tool](#):
 - a. Households in Service Area -Use the houses estimate from the census.gov table to total the number of estimated houses within the larger geography you utilized to show the service area didn’t qualify by LMI.
 - b. Houses inside the Larger Geography – The number of houses based on the Census of the largest geography within the selected service area.
 - c. People Inside Larger Geography – This is the LOWMODUNIV of the total amount of people in the largest geography within the selected service area.

The screenshot shows a web form titled "Update Record". It contains three input fields, each with a red asterisk indicating a required field:

- * Households In Service Area: 5,166
- * Houses Inside Larger Geography (Based on HUD Mapping Tool): 10,000
- * People Inside Larger Geography (Based on HUD Mapping Tool): 20,000

A blue arrow points to the "Next" button located at the bottom right of the form.

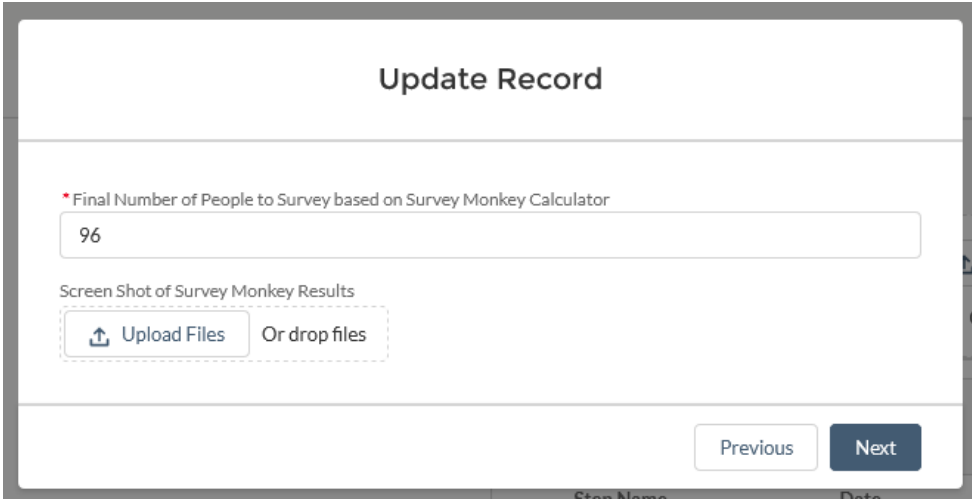
- iv. Once this information is entered, click **Next**.
- v. After **Next** is clicked, the screen will prompt you with the population value field for the Income Survey calculator. Calculate the number of people to survey utilizing the [Survey Monkey Sample Size Calculator](#). The margin of Error for the community can be found on the CDBG Resources page.

The screenshot shows the "Update Record" form after clicking "Next". The form displays a message:

Please use this value for the Population field for the Survey Monkey Calculator
10,332

At the bottom of the form, there are two buttons: "Previous" and "Next". A blue arrow points to the "Next" button.

- vi. Then, find the number of people to survey, screenshot your results and save them on your computer. Click **Next**. After saving the information, enter this data and upload the results and click **Next**. **Note:** The screen will not change once you upload.



The screenshot shows a web form titled "Update Record". It contains a text input field with the value "96" and a label above it that reads "* Final Number of People to Survey based on Survey Monkey Calculator". Below this is a section for "Screen Shot of Survey Monkey Results" with an "Upload Files" button and a dashed box labeled "Or drop files". At the bottom right, there are "Previous" and "Next" buttons.

- vii. After the service area information has been entered, enter the Income Limits for the area. The Income Limits can be found on the CDBG Resources page under the Income Survey Information header.

The screenshot shows a web form titled "Update Record". At the top, there is a heading "Update Record". Below the heading is a paragraph of instructions: "Please use the income limits for the date in which you will START your income survey. Income Surveys are considered started at the point of first contact. You can find the most recent Income Limit Data on [OCRA's CDBG Resources Page](#)." Below this is a label "* County or Metro Statistical Area Used" followed by a text input field containing "Town of Colette MSA". There are eight input fields for income limits, each labeled with a number of persons and "at 80%":

- * 1 Person at 80%: 30,000
- * 2 Person at 80%: 40,000
- * 3 Person at 80%: 50,000
- * 4 Person at 80%: 60,000
- * 5 Person at 80%: 70,000
- * 6 Person at 80%: 80,000
- * 7 Person at 80%: 90,000
- * 8 Person at 80%: 100,000

At the bottom right of the form are two buttons: "Previous" and "Next".

- viii. After the Income Limits for the community are entered click **Next**. After clicking Next, the information provided will be saved and will show up in the Custom Service Area section of the Pre-Income Survey Data Request page. Then, confirm the information.

4. Click "Submit for Approval."

The screenshot displays the IN.gov Income Survey IS-0024 interface. At the top, the IN.gov logo and user name 'Bolanie Test' are visible. Navigation links for 'Home', 'Account Details', and 'Income Surveys' are present. The main content area is divided into 'Details' and 'Related' sections.

Details Section:

- Status: Pre Income Survey Data In Progress
- Custom Service Area**
 - Household In Service Area (Custom SA): 5,166
 - Houses Inside Larger Geography: 10,000
 - People Inside Larger Geography: 20,000
 - Estimated number of People Per Household: 2.00
 - Estimated Number of Households to Survey: 48
- Service Area Conforms to HUD Boundary**
 - Houses in Service Area
 - LOWMODUNIV or Population Service Area
 - People Per Household
 - Est # of Households to Survey
- Final Calculations**
 - Final Number of People to Survey: 96
- Income Limits**
 - County of Metro Stats Area Used: Town of Colette MSA
 - 1 Person @ 80%: 30,000
 - 2 Person @ 80%: 40,000
 - 3 Person @ 80%: 50,000
 - 4 Person @ 80%: 60,000
 - 5 Person @ 80%: 70,000
 - 6 Person @ 80%: 80,000
 - 7 Person @ 80%: 90,000
 - 8 Person @ 80%: 100,000

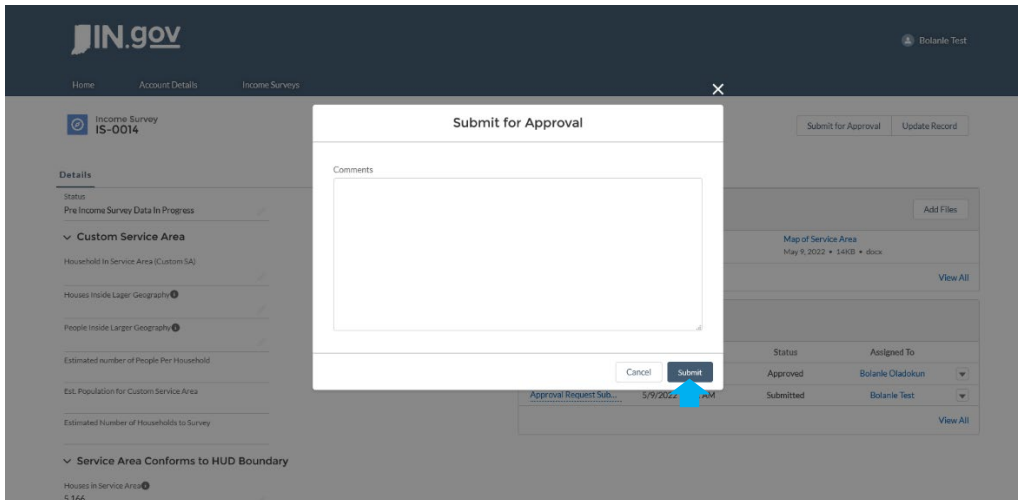
Related Section:

- Files (0)**: Includes an 'Add Files' button and an 'Upload Files' button with the text 'Or drop files'.
- Approval History (2)**: A table showing the following entries:

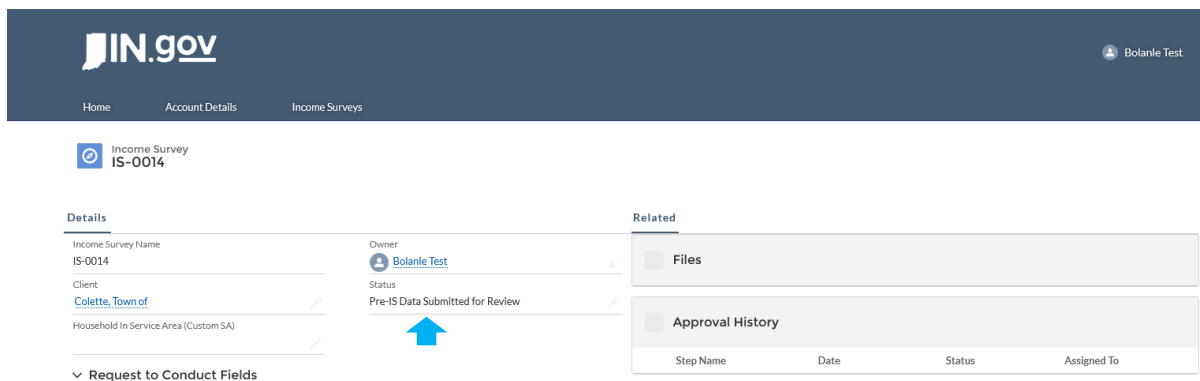
Step Name	Date	Status	Assigned To
Request to Conduct IS ...	5/23/2022 10:02 AM	Approved	Bolanie Oladokun
Approval Request Sub...	5/23/2022 10:02 AM	Submitted	Bolanie Test

At the top right of the main content area, there are two buttons: 'Submit for Approval' and 'Update Record'. A blue arrow points to the 'Submit for Approval' button.

- After you click **Submit for Approval**, a box will appear, enter any additional comments related to the Income Survey and then click **Submit**.



- Once the form is submitted, the status will change to “Pre-IS Data Submitted for Review.”



SUBMITTING THE INCOME SURVEY

- Once the Pre-Income Survey data is approved, you will then be able to submit the Income Survey results. If it is rejected, you will need to create a new Income Survey request and follow the process on page 53. “To find the Income Survey, please follow the Finding an Income Survey Instructions on page 55.”

IN.gov Bolanie Test

Home Account Details Income Surveys

Income Survey IS-0014 Update Record Submit for Approval

Details

Income Survey Start Date: Income Survey End Date:

Survey Results

Number of Families in Target Area:

Total Number of Families Interviewed:

Number of LMI Families Interviewed:

of ppl in LMI families interviewed:

Total number of families above LMI level:

of ppl in families above LMI level:

Calculations Based on Data Contained in Survey

Average size of LMI households:

Average size of non-LMI households:

Proportion of families with LMI:

Proportion of families with non-LMI:

Est. # of LMI families in target area:

Est. # of non-LMI families in target area:

Est. # of LMI persons in target area:

Est. # of non-LMI persons in target area:

Est. % of persons in target area:

Est. % of LMI persons in target area:

Methodology and Uploads

Description of the service area: Description of population Est:

Description of process to draw samples: Description why families were replaced:

Related

Files (2) Add Files

File Name	Date	Size	Type
Justification Letter	May 9, 2022	14KB	docx
Map of Service Area	May 9, 2022	14KB	docx

[View All](#)


Approval History (4)


Step Name	Date	Status	Assigned To
Pre Income Survey Dat...	5/9/2022 12:41 PM	Approved	Income Survey Reviews ...
Approval Request Sub...	5/9/2022 12:37 PM	Submitted	Bolanie Test
Request to Conduct IS...	5/9/2022 10:35 AM	Approved	Bolanie Oladokun
Approval Request Sub...	5/9/2022 10:31 AM	Submitted	Bolanie Test

[View All](#)

- After conducting the Income Survey, fill out the corresponding information in by clicking the “Update Record” button. Once you click “Update Record”, a box will appear. The box will ask for information related to the Income Survey requested. When you are finished entering the information, click **Next**. For assistance, please follow the Income Survey Manual located on the CDBG Resource page.

Update Record

* Income Survey Start Date 

* Income Survey End Date 

* Number of families in the target area


* Total number of families interviewed

* Total number of low- and moderate income families

* Total number of persons living in the low- and moderate income families interviewed

* Total number of families interviewed in which the income was above the low- and moderate income level

* Total number of persons living in the families in which the income was above the low- and moderate-income level.

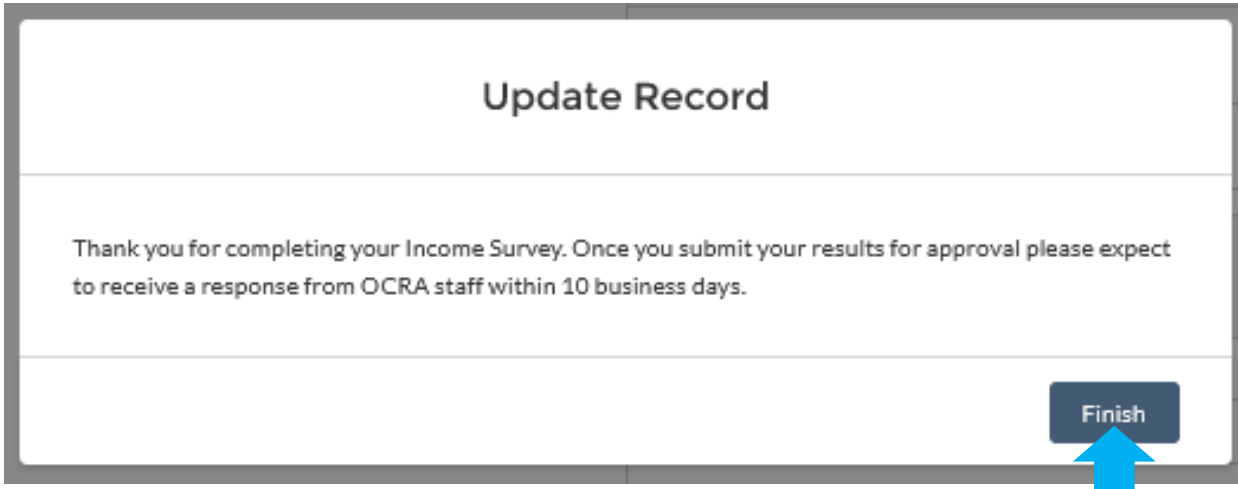


3. After Next is clicked, you will be prompted to provide descriptions of the following:
 - a. Service Area
 - b. Population List
 - c. Process to Draw Samples
 - d. Why Families Were Replaced

4. And upload the following:
 - a. Population List
 - b. List of Families
 - c. List of Families Sampled
 - d. Actual Survey Responses
 - e. Income Survey Certification Upload

The screenshot shows a web form titled "Update Record". It contains four text input fields, each preceded by a red asterisk and a label: "Description of the Service Area", "Description of the Population List", "Description of Process to Draw Samples", and "Description of Why Families Were Replaced". Each field contains the placeholder text "Service Area". Below these fields are five file upload sections, each with a dashed border and two buttons: "Upload Files" (with an upload icon) and "Or drop files". The sections are labeled: "Population List", "List of Families", "List of Families Sampled", "Actual Survey Responses", and "Income Survey Certification Upload". At the bottom right of the form are two buttons: "Previous" and "Next". A blue arrow points to the "Next" button.

5. Once all the data is entered, click **Next**. Then, read the confirmation box and click **Finish**.



Bolanie Test

[Update Record](#) [Submit for Approval](#)

Details

Income Survey Start Date: 4/6/2022

Income Survey End Date: 5/9/2022

Survey Results

- Number of Families in Target Area: 97
- Total Number of Families Interviewed: 110
- Number of LMI families interviewed: 80
- # of ppl in LMI families interviewed: 140
- Total number of families above LMI level: 30
- # of ppl in families above LMI limit: 60

Calculations Based on Data Contained in Survey

- Average size of LMI households: 1.75
- Average size of non LMI households: 2.00
- Proportion of families with LMI: 0.73
- Proportion of families with non LMI: 0.27
- Est. # of LMI families in target area: 71
- Est. # of nonLMI families in target area: 26
- Est. # of LMI persons in target area: 123
- Est. # of non LMI persons in target area: 53
- Est # of persons in target area: 176
- Est. % of LMI persons in target area: 70.00%

Methodology and Uploads

- Description of the service area: The description
- Description of process to draw samples: The description
- Description of population list: The description
- Description why families were replaced: The description

Related

Files (2)

Justification Letter May 9, 2022 • 14KB • docx	Map of Service Area May 9, 2022 • 14KB • docx
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[View All](#)

Approval History (4)

Step Name	Date	Status	Assigned To
Pre Income Survey Dat...	5/9/2022 12:41 PM	Approved	Income Survey Reviews...
Approval Request Sub...	5/9/2022 12:37 PM	Submitted	Bolanie Test
Request to Conduct IS ...	5/9/2022 10:35 AM	Approved	Bolanie Oladokun
Approval Request Sub...	5/9/2022 10:31 AM	Submitted	Bolanie Test

[View All](#)

6. After you **Click Submit for Approval**, a box will appear. Enter any additional comments related to the Income Survey and then click **Submit**.

The screenshot displays the IN.gov Income Survey IS-0014 interface. A modal dialog titled "Submit for Approval" is open, featuring a "Comments" text area and "Cancel" and "Submit" buttons. A blue arrow points to the "Submit" button. The background interface includes a navigation bar with "Home", "Account Details", and "Income Surveys". The main content area shows survey details for IS-0014, including the start date (4/6/2022) and various survey results. A table of survey actions is visible, with the "Approval Request Sub..." row highlighted. The survey results section includes calculations based on data contained in the survey and methodology and uploads.

Status	Assigned To
Approved	Income Survey Reviews ...
Submitted	Bolanle Test
Approved	Bolanle Oladokun
Submitted	Bolanle Test

7. Once the Income Survey has been approved, you will be able to review it and it will be in the system to use for future applications. To view an income survey, follow the steps on page 55 for “Finding an Income Survey.”

GLOSSARY

GMS NAVIGATION MENU

The GMS navigation menu is the blue bar at the top of the website.

GRANT APPLICATION TAB

This is the second option after clicking account details. This will lead you to all records provided before the grant is awarded.

GRANT ADMINISTRATION TAB

This is the second option after clicking account details. This will lead you to all records provided after the grant is awarded.