AMERICAN REINVESTMENT AND RECOVERY ACT (ARRA) SHAREPOINT ACCOUNTABILITY

AGENCY END USER TRAINING

OBM | Training Academy

LEARNER'S GUIDE

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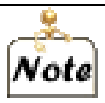
Using this Guide

This guide is designed to serve as a reference document. The guide is divided into sections. Each section represents a different Topic. As you move through the guide, look for ways to make it work for you.

Table of Icons

The table shown below lists the icons you will see throughout this guide. The icons are used to highlight specific content to help quickly navigate through the material.

Icon	Name	Description
	Best Practice	Highlights a “Best Practice” for a specific process or function.
	Critical	Stresses critical information or warnings around a process or function. Review these carefully as they can help you avoid errors.
	**Note**	Stresses “nice to know” information surrounding the topic. Review these sections carefully.

Course Introduction

This course is designed to provide you with the knowledge and skills associated with accessing the ARRA site to insert data and retrieve reports.

This document may include:

- Objectives for the course
- Step-by-step instructions
- Best practices
- Additional Resources

Course Overview

The ARRA site was created by OBM as a repository for consolidating ARRA data from individuals and agencies requesting and receiving funds through the federal stimulus package. This training will walk you through the steps of accessing the programs using funds and adding the 1512 data that is required by the federal government to comply with the accountability and transparency requirements of ARRA. Report retrieval will also be covered in the training as these reports must accurately indicate the allocation of ARRA funds which are reported to recovery.gov on a quarterly basis.

The information contained in this manual is subject to change as the ARRA Hub is being modified to better serve ARRA users.

Prerequisites for this Course

Prerequisite include:

- In order to view programs within the ARRA site you must be granted access to that particular program. This can occur if you are an individual who has been granted funding for a program or the individual requesting the program funding has added you to the program data within the ARRA Hub.

Course Objectives

This course provides you with knowledge of the ARRA SharePoint Site including:

- Requesting access to the ARRA site.
- Log-in procedures.
- Identification of program requests.
- Navigation to the appropriate tab.

- Data collection within Section 1512.
- Uploading of required documentation.
- Report retrieval.
- Analysis and exporting of reports.

Requesting Access to ARRA

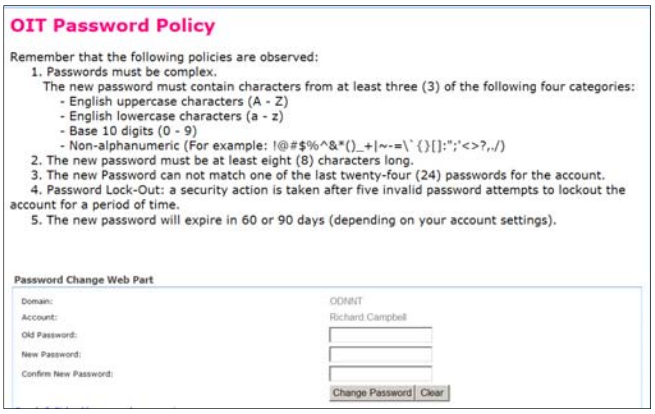
If your agency email is hosted by OIT then just send an email to ARRA.Support@obm.state.oh.us requesting access to the site. If your email is not hosted by OIT then send an email to the same address requesting access and a spreadsheet with the following information on it:

- First Name
- Middle Initial
- Last Name
- Email Address
- Agency
- Address
- Phone Number
- Fax
- Title
- OAKS ID (if state employee)

Logging into ARRA

When you have been provided with your user name and password you can log into the ARRA system.

You should change your temporary password that was assigned to you when requesting access. If you do not it will eventually expire and you will be locked out of the system. To change your temporary password go to https://spsupportportal.ohio.gov/Pages/PasswordChange.aspx. Follow the instructions to change your password.



OIT Password Policy

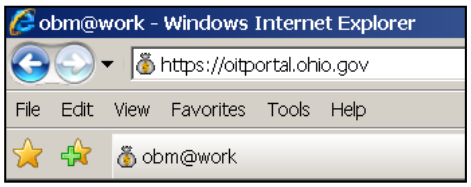
Remember that the following policies are observed:

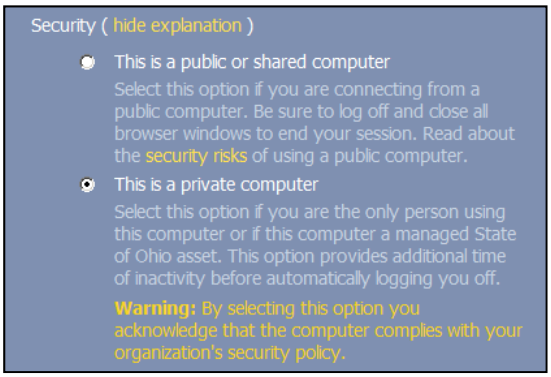
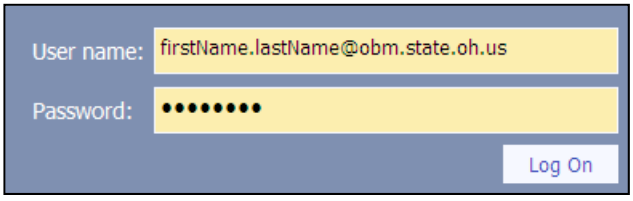
1. Passwords must be complex.
   The new password must contain characters from at least three (3) of the following four categories:
   - English uppercase characters (A - Z)
   - English lowercase characters (a - z)
   - Base 10 digits (0 - 9)
   - Non-alphanumeric (For example: !@#$%^&*()_+|~-=\`{}[]:";'<>?,./)
2. The new password must be at least eight (8) characters long.
3. The new Password can not match one of the last twenty-four (24) passwords for the account.
4. Password Lock-Out: a security action is taken after five invalid password attempts to lockout the account for a period of time.
5. The new password will expire in 60 or 90 days (depending on your account settings).

Password Change Web Part

Domain: ODNNT
Account: Richard.Campbell
Old Password:
New Password:
Confirm New Password:
Change Password | Clear

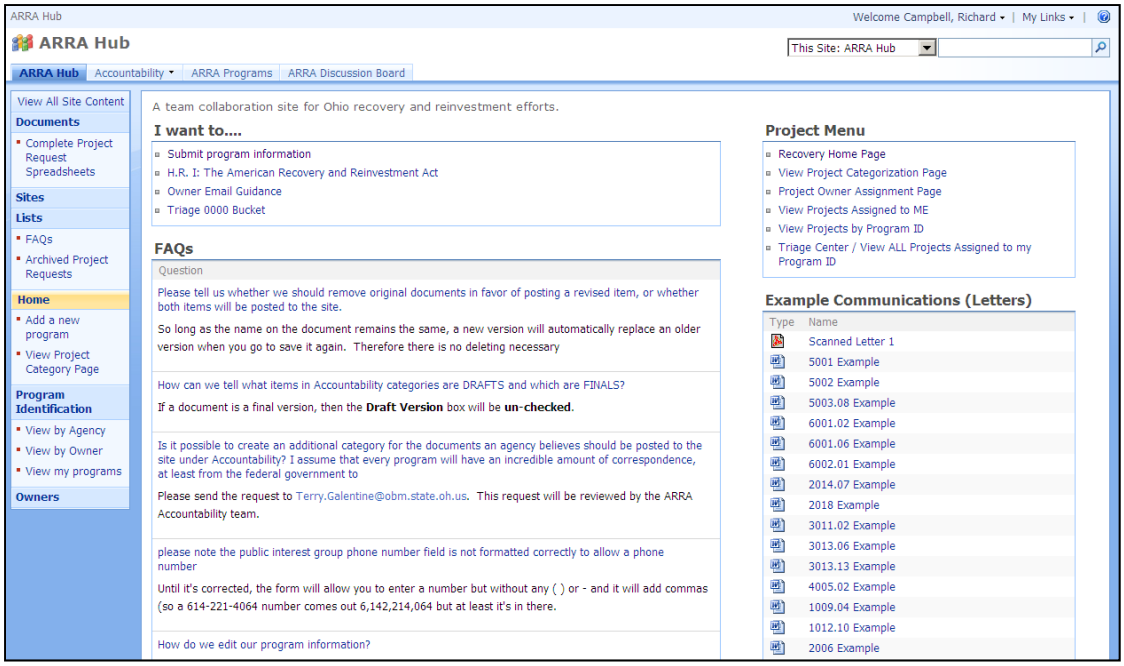
On the log-in screen it is important to select this is a private computer if you are not using a Shared Computer. If you do not check this option the system will log you out after a certain amount of time.

Step-by-Step	Screen
1. Open your web browser application and type http:oitportal.ohio.gov/sites/recovery into the address bar.	

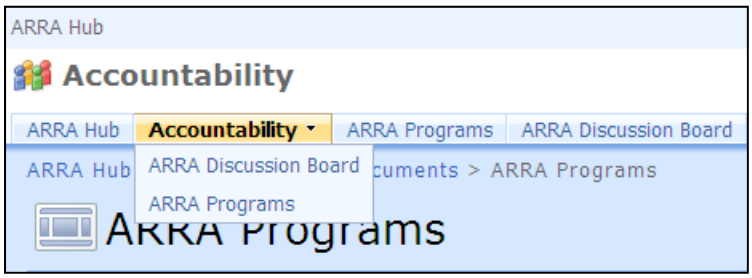
2. The State of Ohio SharePoint Services Log-in page will open.	
3. Under **Security** select **This is a private computer** if you are not using a Shared Computer.	
4. Your **User name** will be your full email address or odnt\FirstName.LastName. Your **password** will be assigned by OIT.	
5. Once you have entered your **user name** and **password** press the **Log on** button to enter the system.	

Navigating ARRA Hub

Once you are logged into ARRA you will start in the ARRA Hub. This is where you will add program requests, access information, and view FAQs.

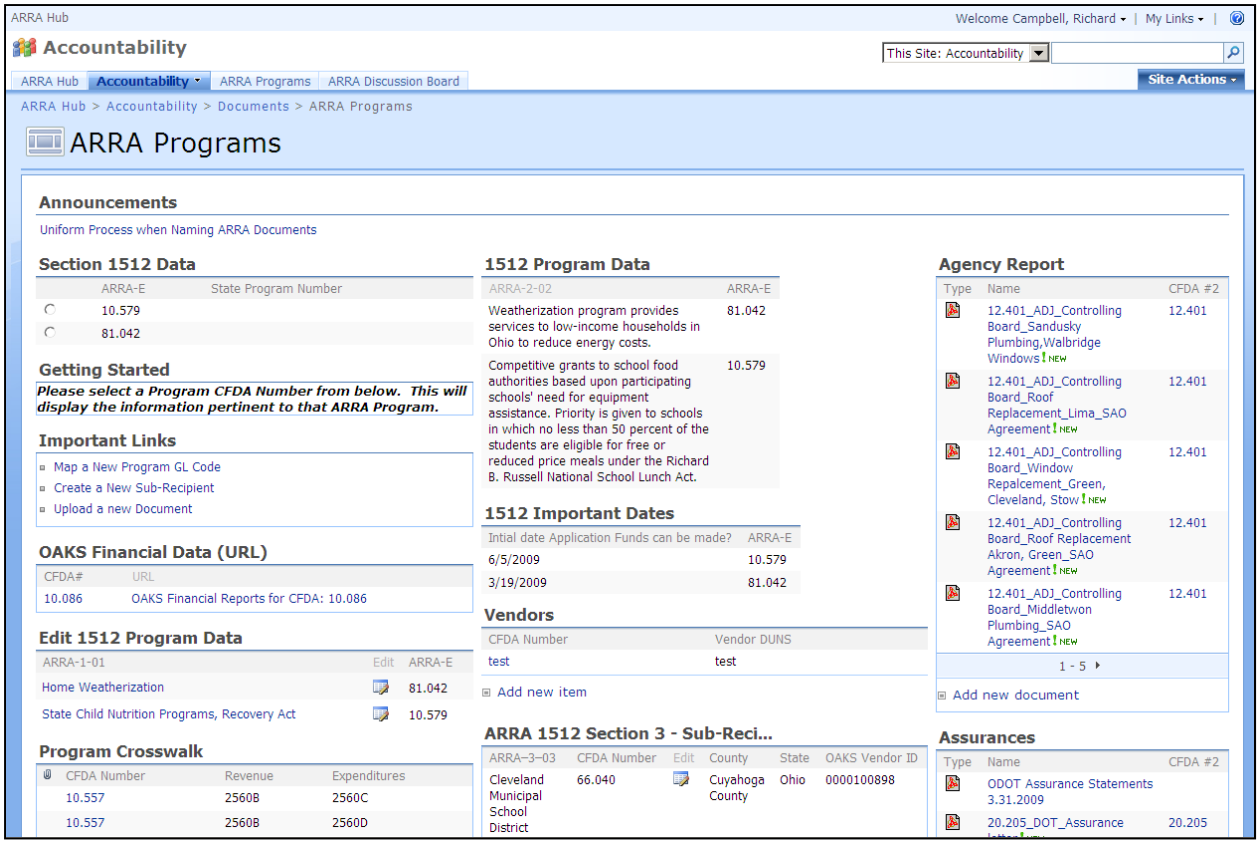


The section we will be focusing on is ARRA Programs. Click on the ARRA Programs tab to access this page. You can also get to this page by clicking ARRA Programs located under the Accountability drop-down menu.



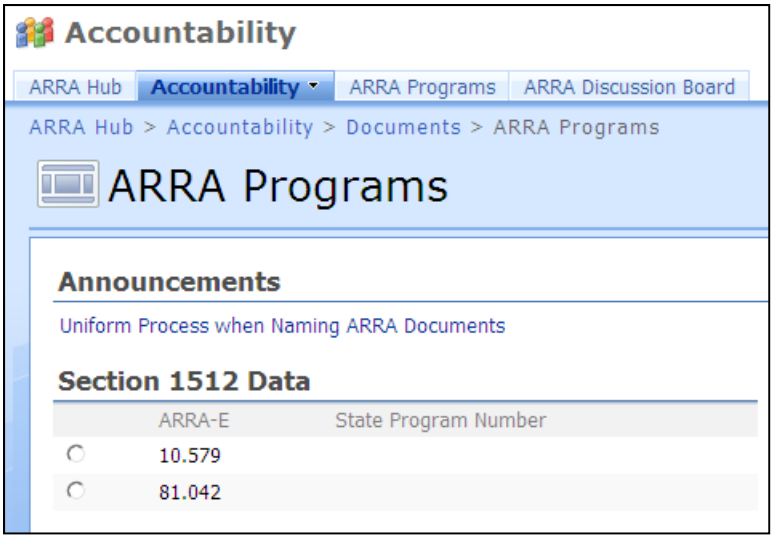
ARRA Programs

The ARRA Programs page will provide you with all the data associated with your programs. This is where you will view and edit your 1512 program data. You will also retrieve reports from this page.

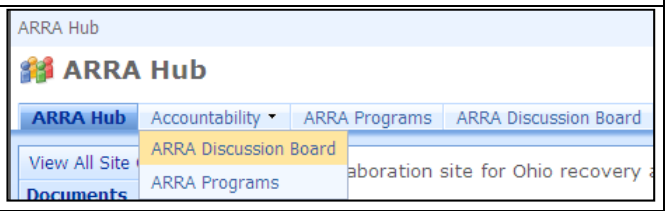
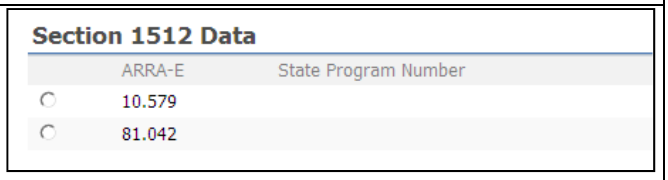


Section 1512 Data

All programs that you are receiving funds through should appear under Section 1512 Data and listed by their CFDA# (ARRA-E). If your program is not listed here please contact ARRA.Support@obm.state.oh.us to have the program added to the system.



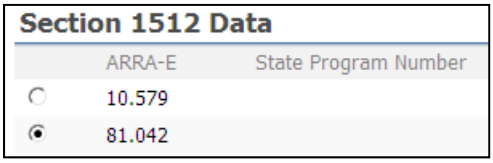
Step-by-Step	Screen

1. When you log into the system you will start inside the ARRA Hub.	
2. To view the programs you have been granted funding click on ARRA Programs. This link is provided under the Accountability drop-down and it is also a tab.	
3. The Section 1512 Data will provide you will all the programs you are receiving funds.	

Data Collection with Section 1512

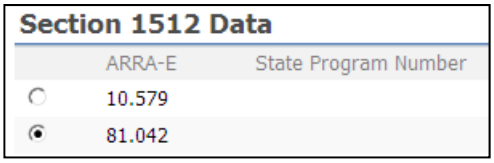
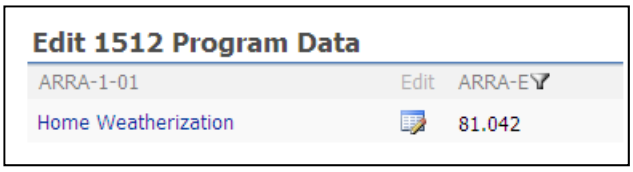
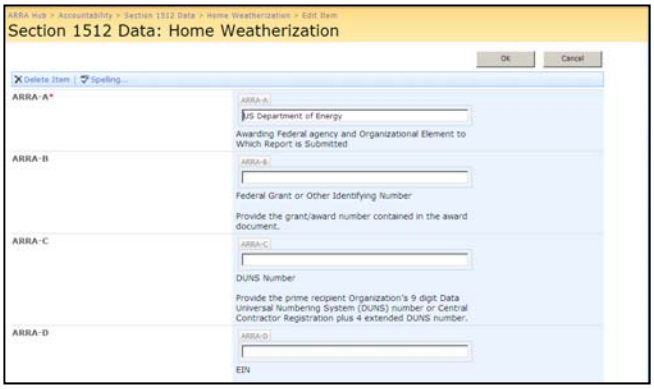
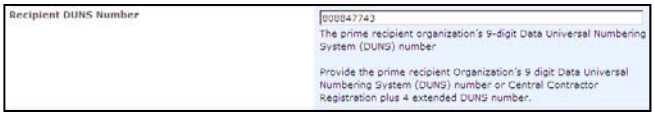
All of the pages you will need to edit and view program data will appear under the ARRA Programs tab.

You must select which program you wish to work in by clicking the button next to ARRA-E. This is applicable even when you only have one program listed.

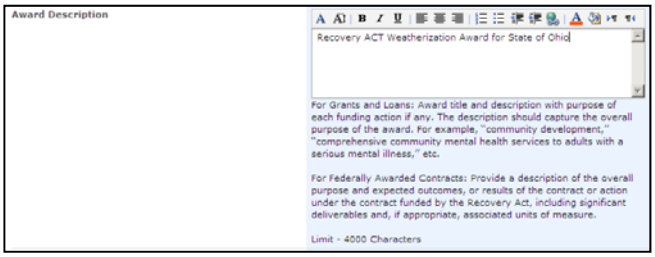
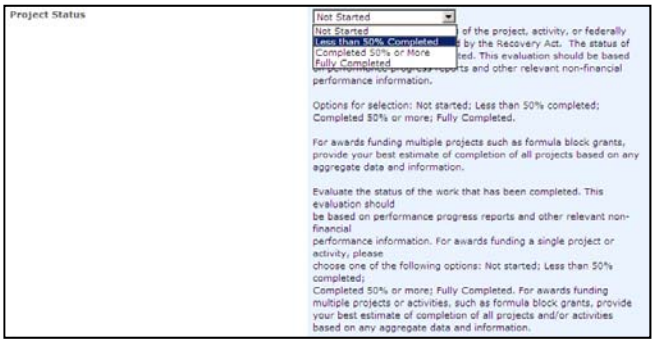
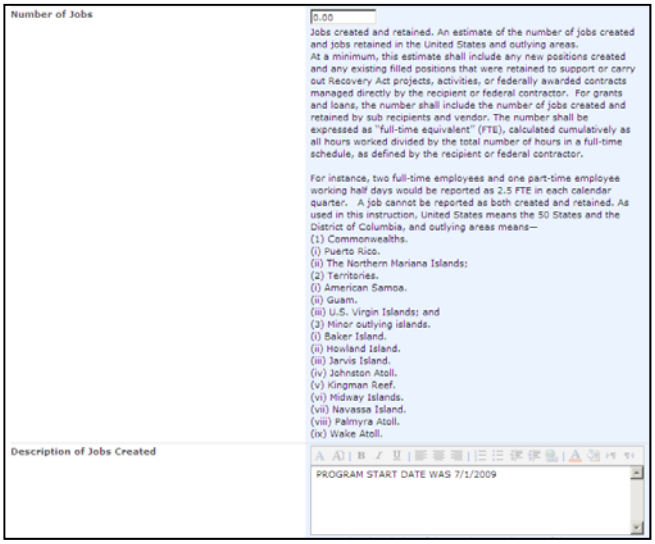
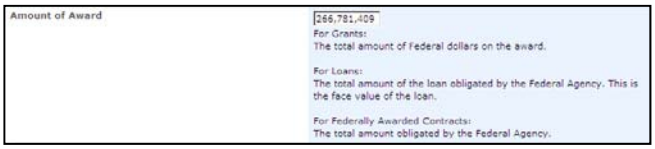


After selecting the correct program you will need to edit the 1512 Program Data.

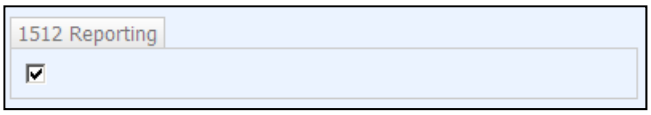
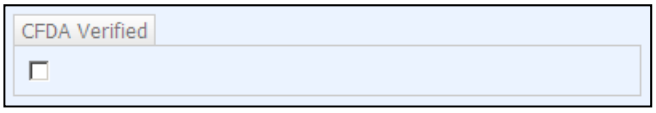
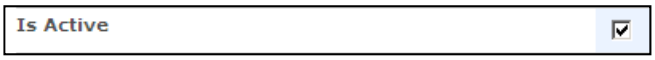
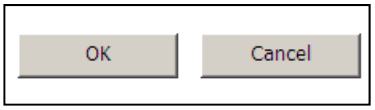
It is critical you keep the 1512 Program Data current. Although the program data is submitted quarterly it is imperative that this data is supplied well before the deadline to prevent last minute errors in calculating funds.

Step-by-Step	Screen
1. Select the correct CDFA# (ARRA-E) for the program you will be editing data.	
2. A heading for **Edit 1512 Program Data** will be located in the left column. Click on the icon under **Edit** to add the program data.	
3. The form for your program to provide all necessary 1512 data will be displayed.	
4. The Funding Agency Code, Awarding Agency Code, Awarding Agency Name, Program Source, and Award Number will be provided to you from the Federal agency awarding your funding.	
5. The Order Number only applies to Federal contracts.	
6. The nine digit DUNS number of the prime recepient is entered into the Recipient DUNS Number.	
7. Government Contracting Code will be for Federal contracts.	

8. A CFDA Number will be supplied to you through the Federal Agency providing your funding.	CFDA Number 81.042 The Catalog of Federal Domestic Assistance (CFDA) number is the number associated with the published description of Federal assistance program in the Catalog of Federal Domestic Assistance. Provide Catalog of Federal Domestic Assistance (CFDA) number on the award document or provided by the awarding agency. If this award is being funded through multiple programs, provide each CFDA number.
9. ARRA-D is for your nine character MPIN number.	ARRA-D GBATE1234 The MPIN is a mandatory data element created by the CCR registrant and must have nine characters: at least one letter (upper or lower case) and one number. No spaces or special characters are permitted.
10. ARRA-F, Agency Office Name, ARRA-F Address, Recipient and Congressional District is the prime recipient's information.	ARRA-F DEV - DEVELOPMENT Recipient Organization (1) Provide the legal name of recipient organization and address, including zip code. This should be the same name and address that appears in recipient's Central Contractor Registration profile. Agency Office Name Office of Community Services ARRA-F Address 77 South High Street 27th Floor Columbus, Ohio 43215 Recipient Organization Address (2) Provide the legal name of recipient organization and address, including zip code. This should be the same name and address that appears in recipient's Central Contractor Registration profile. Recipient Congressional District 15
11. The Recipient Account Number is a number created by the prime recipient.	Recipient Account Number Recipient's internal account number for award. The account number or any other identifying number assigned by the recipient to the award. This number is strictly for the recipient's use only and is not required by the awarding Federal agency. This is an optional field.
12. ARRA-H is the time period for the project/grant.	ARRA-H 04/01/2009 - 03/31/2012 Project/Grant Period Indicate the project/grant period established in the award document during which Federal sponsorship begins and ends. Note: Some agencies award multi-year grants for a project/grant period (e.g., 5 years) that are funded in increments known as budget periods or funding periods. These are typically annual increments. Please provide the total project/grant period, not the individual budget period or funding period.
13. ARRA-I is the reporting period end date. The date will be the end of the current quarter.	ARRA-I 09/30/2009 Reporting Period End Date The frequency of required reporting is quarterly. Provide the ending date of the reporting period. For quarterly reports, the following calendar quarter reporting period end dates shall be used: 6/30; 9/30; 12/31; or 3/31. For final reports, the reporting period end date shall be the end date of the project/grant period.
14. The Final Report will not be checked until the program has ended and you are finished submitting data.	Final Report ☐ Final Project Report Indicator. Check the box only if this is the final report and there will be no further quarterly reports. Mark appropriate box.
15. ARRA-K will be set to Quarterly.	ARRA-K Quarterly Report or Frequency Select "quarterly" for quarterly reports and/or "final".
16. Select the Award Type from the drop-down menu.	Award Type Grant Contract Grant Loan Grant, Loan, or Federally Awarded Contract award Type of federal financial assistance not specifically identified above should be reported under the award type of Grant.
17. Award Date is for the date the award was signed.	Award Date 4/1/2009 The date when the award is signed.

18. The Award Description and Project Description can be the same. This is a basic description of the award and should be supplied by the Federal awarding agency.	
19. The Project Status will allow you to choose a status between not started and fully complete.	
20. The Activity Code is a six digit code which can be found by following the link in this section and typing a keyword on the site to find the correct code. One link is for infrastructure projects the other is for everything else.	
21. The Number of Jobs and Description of Jobs Created will be covered by an additional discussion at OBM.	
22. The Amount of Award is the total amount of Federal dollars on the award.	

23. The Infrastructure Purpose and Rationale through the Infrastructure contact information is for Infrastructure projects only.	**Infrastructure Purpose and Rationale** This is for grants and loans only Purpose and rationale of funds received for infrastructure investment with funds made available under the Recovery Act. Identify the purpose and explain how the infrastructure investment will contribute to one or more purposes of the Recovery Act: Purposes: (1) To preserve and create jobs and promote economic recovery. (2) To assist those most impacted by the recession. (3) To provide investments needed to increase economic efficiency by spurring technological advances in science and health. (4) To invest in transportation, environmental protection, and other infrastructure that will provide long-term economic benefits. (5) To stabilize State and local government budgets, in order to minimize and avoid reductions in essential services and counterproductive state and local tax increases. Limit of 4000 Characters.
24. The Primary Place of Performance fields are for the prime recipient.	**Primary Place of Performance – Street Address 1** Recipient Primary Place of Performance (city, state, congressional district, and country) physical location of primary place of performance. **Primary Place of Performance – Street Address 2** Recipient Primary Place of Performance (city, state, congressional district, and country) physical location of primary place of performance. **Primary Place of Performance – State** OH Recipient Primary Place of Performance (city, state, congressional district, and country) physical location of primary place of performance.
25. The Prime Recipient Highly Compensated Name fields must be filled in only if the prime recipient meets all of the conditions listed.	**Prime Recipient Highly Compensated Name(1)** Names of each of the five most highly compensated officers of the recipient for the calendar year in which the award is awarded if— (i) In the recipient's preceding fiscal year, the recipient received— (A) 80 percent or more of its annual gross revenues from Federal contracts (and subcontracts), loans, grants (and subgrants) and cooperative agreements; and (B) $25,000,000 or more in annual gross revenues from Federal contracts (and subcontracts), loans, grants (and subgrants) and cooperative agreements; and (ii) The public does not have access to information about the compensation of the senior executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986.
26. The fields under the Prime Recipient Highly Compensated Name fields are not 1512 data. This is data that is helpful to the governor's office in tracking the 1512 data.	**ARRA-4-01** 0 Total Number of Subcontracts and Subawards less than $25,000/award and awarded to individuals. **ARRA--4--02** 0 Total Amount of Subcontracts and Subawards less than $25,000/award and awarded to individuals. Provide the total cumulative amount of cash disbursed to subawardees and subcontractors. This aggregate amount should be cumulative as of the reporting period end date.
27. Near the bottom of the Section 1512 Data page are fields to grant additional persons access to this program's data. The individual being added must already have an ARRA account set up.	**Owner** Owner Sunday, Nick G. **Co-Owner** Co-Owner Skaggs, Donald A. **CFO** CFO Sudderberg, Lynda P. **Additional Staff 1** Additional Staff 1 Bartley, Trudy A. **Additional Staff 2** Additional Staff 2 Gavin, Ciel A. **Additional Staff 3** Additional Staff 3 **Additional Staff 4** Additional Staff 4 **Additional Staff 5** Additional Staff 5 Galentine, Terry **Additional Staff 6** Additional Staff 6 Campbell, Richard

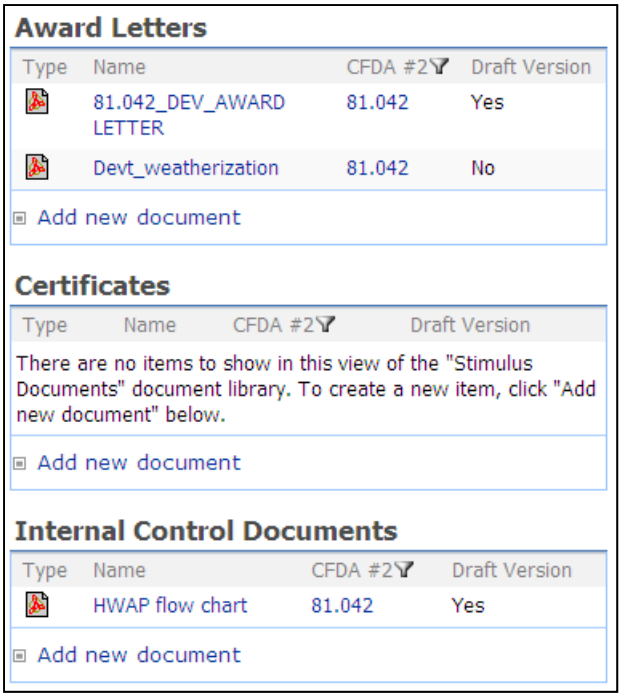
28. OBM will verify 1512 reporting to the Federal system for this program and check this box.	
29. When OBM has verified the Program name and the CFDA # against the Federal system this box will be checked.	
30. A check will appear in the Is Active field for programs using funding.	
31. Once you have filled in all fields click the **OK** button to submit the data.	

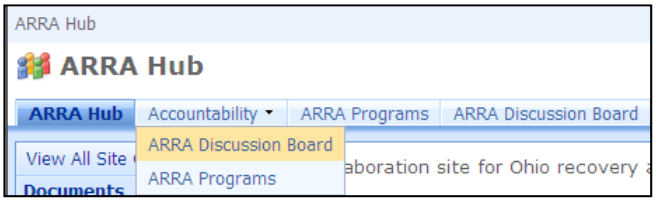
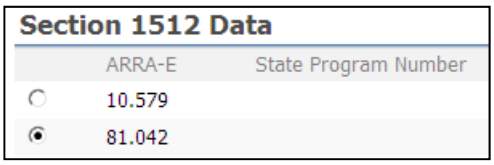
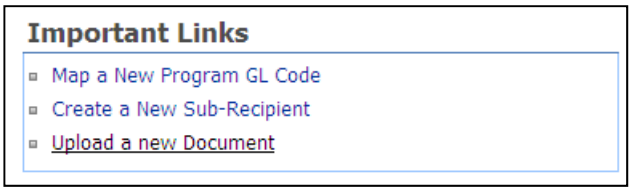
If you have questions or need help with filling out any of the fields contact ARRA.Support@obm.state.oh.us.

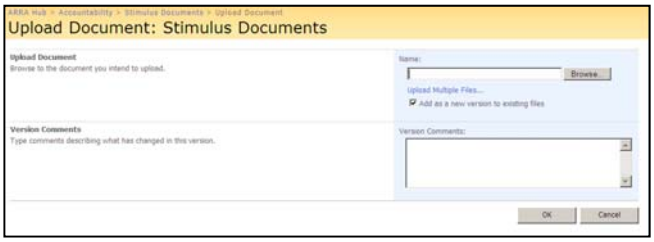
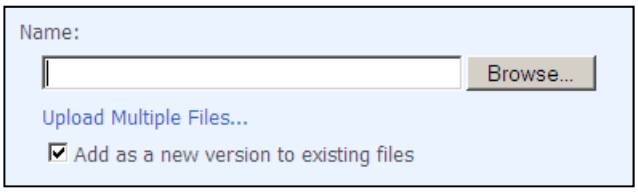
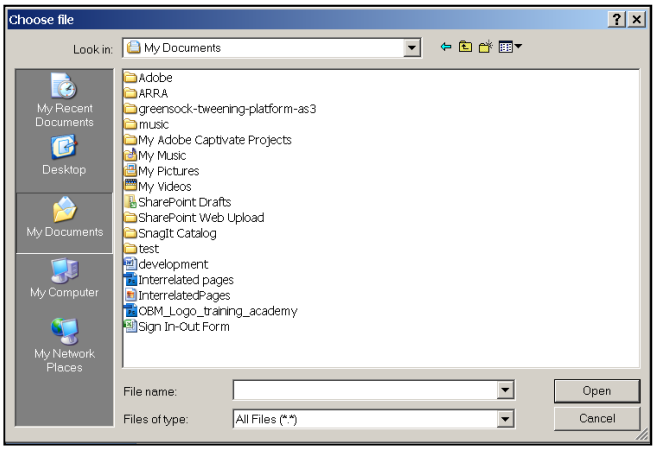
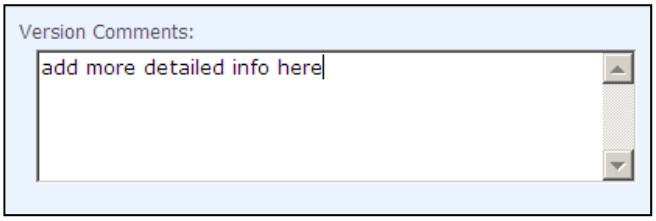
Uploading Required Documentation

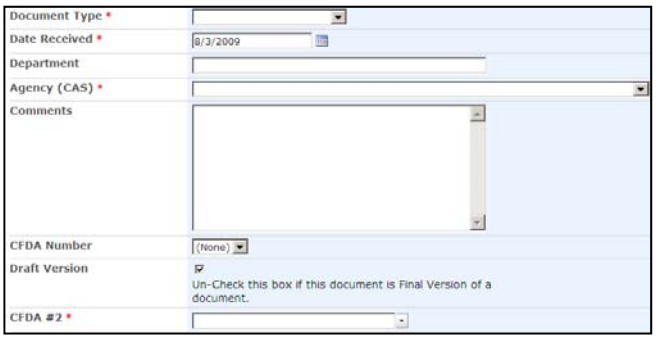
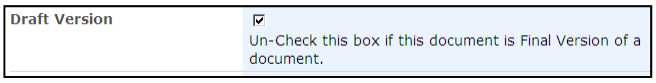
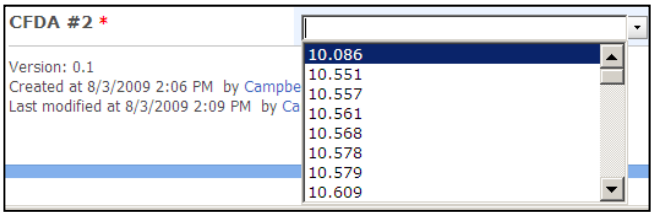
Any documentation that applies to the program you are receiving funding should be uploaded and stored inside that ARRA program's page. All of the documents that are added to the programs ARRA page will appear on the left side of the screen and cataloged into the appropriate category.

Make sure you have converted your document to a PDF before uploading it to the ARRA system.



Step-by-Step	Screen
1. Verify that you are on the ARRA Programs page.	
2. Select the correct CDFA# (ARRA-E) for the program you will be uploading documentation.	
3. Under **Important Links** click on the **Upload a new Document** link.	

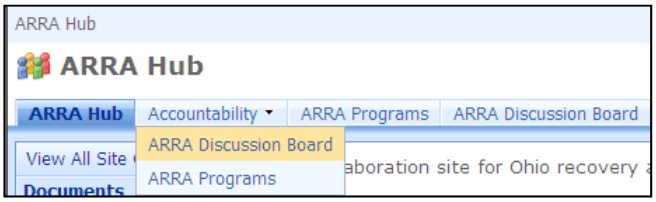
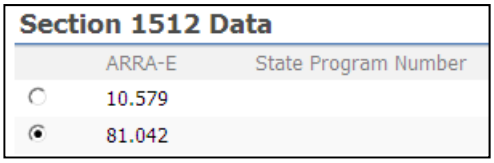
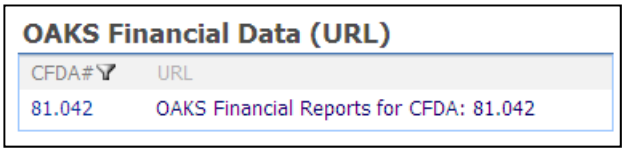
4. The Upload Document window appears.	
5. Click the **Browse** button to locate the PDF to upload.	
6. Locate the PDF to upload on your computer. Select the file and click the **Open** button.	
7. Leave **Add as a new version to existing files** checked.	
8. You can add a more detailed description of the PDF in the **Version Comments** box.	
9. Click **OK** to upload the PDF.	

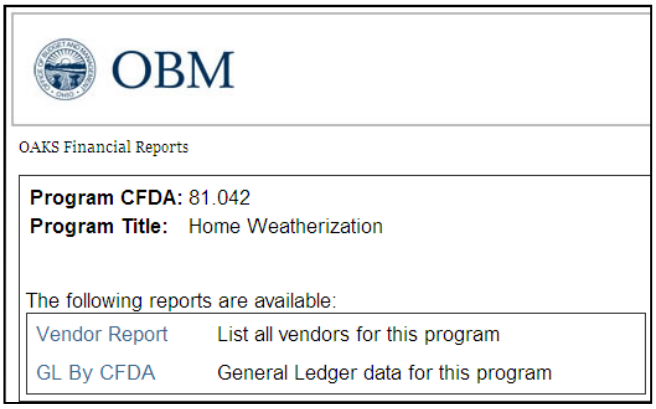
10. You will need to provide details about the document before adding it to the program data.	
11. Select a program # from the drop-down list or specify your own value.	
12. Complete filling in the information on the rest of the fields. Remember * means you must fill in that field to submit the form.	
13. The **Draft Version** will be selected by default. Unchecking this will allow the final oversight agency to view this document.	
14. Select the CFDA # for the program from the drop-down under the **CFDA #2** field.	
15. Select **Check In** when you have completed filling in the fields.	

Report Retrieval

To retrieve reports, for accountability of funding for specific programs, the ARRA system will pull data from the OAKS system and generate reports. These reports will provide data on a variety of information from vendors, the General Ledger, and other entities affecting the financial data.

Fiscal Year: 2009	
Accounting Period: 12	
ACM OHIO LLC	$34.88
AKRON BEACON JOURNAL	$338.74
ASHTABULA COUNTY COMMUNITY	$525,437
CALL & POST	$208.56
CINCINNATI HAMILTON COUNTY	$1,115,785
CLERMONT CO COMM SVCS INC	$206,950
CLEVELAND CITY OF	$2,079,678
CLINTON CO COMM ACTION PROG	$359,506
COMMUNITY ACTION COMMISSION OF	$111,813
COMMUNITY ACTION COUNCIL OF	$234,624
COMMUNITY ACTION LANCASTER	$153,576
COMMUNITY ACTION ORGANIZATION	$229,263
COMMUNITY ACTION PARTNERSHIP	$1,811,962
COMMUNITY ACTION WAYNE MEDINA	$255,344

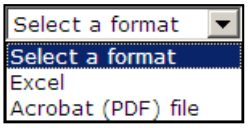
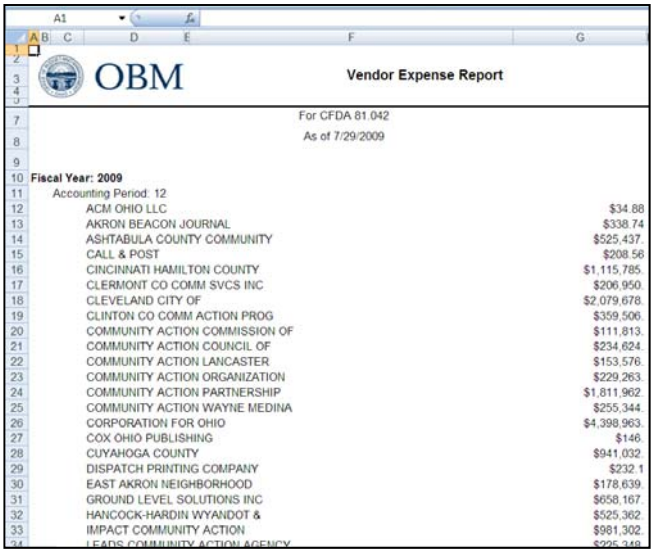
Step-by-Step	Screen
1. Verify that you are on the ARRA Programs page.	
2. Select the correct CDFA# (ARRA-E) for the program you will be retrieving reports.	
3. Under **OAKS Financial Data (URL)** click on the link under **URL.**	

4. A list of available reports will appear for the CFDA program you have selected. More reports will become available in the future. Click on a report to view details.	
5. A detailed list of data for the report you selected will appear.	

Analysis and Exporting of reports

Reports can be exported to an excel document or a PDF from the menu at the top of the report you are viewing.

Step-by-Step	Screen

1. To open reports follow the steps in the previous section, report retrieval.	
2. Using the menu at the top of the report select the format to export the data.	
3. Press **Export** after you have selected the format type.	
4. The report will open in the format you selected with the data available for analysis.	

Course Recap

- Contact ARRA.Support@obm.state.oh.us to request access to the site and for program requests.
- Follow the log-in procedures to access the ARRA Hub.

- Use the ARRA Hub to track your programs and add 1512 data.
- Add documents and resources pertaining to your program by uploading content.
- View, analyze, and export reports pertaining to your ARRA program.

Additional Resources

- Remember to contact ARRA.Support@obm.state.oh.us for assistance or questions you have when working with ARRA.

Action Plan: Things to remember that will help me do my job:

- _____
- _____

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