IDAHO OFFICE OF
DRUG POLICY
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Substance Use Prevention, Treatment, &
Recovery Services (SUPTRS) Block Grant
for Primary Prevention Programs

SUPTRS Grantee Process Guide

How to use **Neighborly**, submit **Reimbursement Requests**, complete **Quarterly Activity Reports**, administer **Surveys**, obtain **CPS and PPS** credentials, and access online **trainings**

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SFY2024

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Accessing Your Grantee Portal

Logging In

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

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

Registering a New Account

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

Forgot Your Password

If you forgot your password, go to the Grantee Portal and select Forgot Your Password.

Adding a New User to Your Grantee Portal

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

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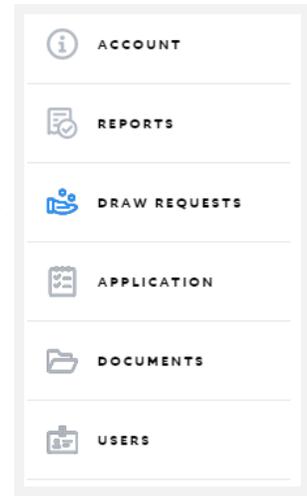

Add a User

3

How to Complete a Reimbursement Request

To submit a request for reimbursement, log into your Grantee Portal and follow these steps:

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

   - ⓘ ACCOUNT
   - REPORTS
   - DRAW REQUESTS
   - APPLICATION
   - DOCUMENTS
   - USERS

2. **Click *Add a Draw***

   Add a Draw

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

   ADD A DRAW
   Request Date: 7/6/2021
   Description: Enter description
   Add

IMPORTANT

3. **Click on the hyperlink to submit a detailed reimbursement request and upload supplemental documents via JotForm.**

   | Request | Workflow 0 of 2* |

   **ACTION REQUIRED: This draw request has NOT yet been submitted. In the form below, provide a summary of the draw request, enter the amount requested by category, upload any supporting documentation, and then click Submit.

   SUMMARY

   July Reimbursement Request

   DOCUMENTATION

   **ACTION REQUIRED:

   First, you need to click here to submit a detailed reimbursement request and upload supplemental documents via JotForm. Once you have submitted the detailed reimbursement request on JotForm, return to this Neighborly webpage and enter the TOTAL amount you are requesting per program in the table below. Then click submit.

   3.1. Up to five expenses can be entered within the JotForm.

   3.2. Supporting Documents (e.g., receipts, invoices, purchase orders, etc.) will be uploaded via JotForm at the bottom of the expense page by clicking *Browse Files*.

   Supporting Documents #1

   Browse Files

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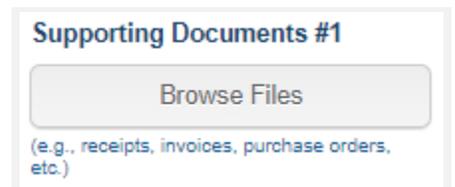
4. The final page of the JotForm will list the total amount requested by program. These will also be listed in the notification email you receive when you submit the JotForm reimbursement request. **You will need to enter the amount(s) requested per program(s) into the draw request in your Grantee Portal.**

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

Total Requested Amount	Total Administration Fee	Total Reimbursement Amount
950	190	1140

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

Signature

Clear

Save   Submit   🖨 Print Form

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

Program Category(ies)   Amount(s) Requested

DETAILS

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

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

Cancel   Submit

How to Submit a Quarterly Report

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

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

   - (i) ACCOUNT
   - REPORTS
   - DRAW REQUESTS
   - APPLICATION
   - DOCUMENTS
   - USERS
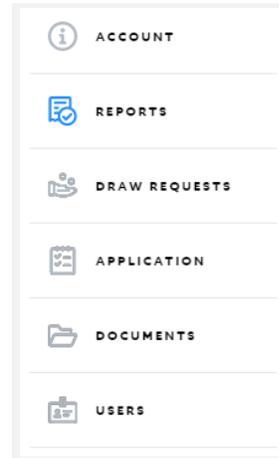
2. The reports will be listed based on reporting period and date range. **Select the report that you want to complete by clicking *Start*.**

   Note: reporting dates in the image below have been adjusted for training purposes.

   FY24 SUPTRS grantee reporting periods are as follows:
   - **Quarter 1:** July 1 – September 30
     - Due Date: October 10
   - **Quarter 2:** October 1 – December 31
     - Due Date: January 10
   - **Quarter 3:** January 1 – March 31
     - Due Date: April 10
   - **Quarter 4:** April 1 – June 30
     - Due Date: June 15

Reports

Quarterly Report (0 of 4)

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

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

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

   Reports ❯ Quarterly Report ❯ 91

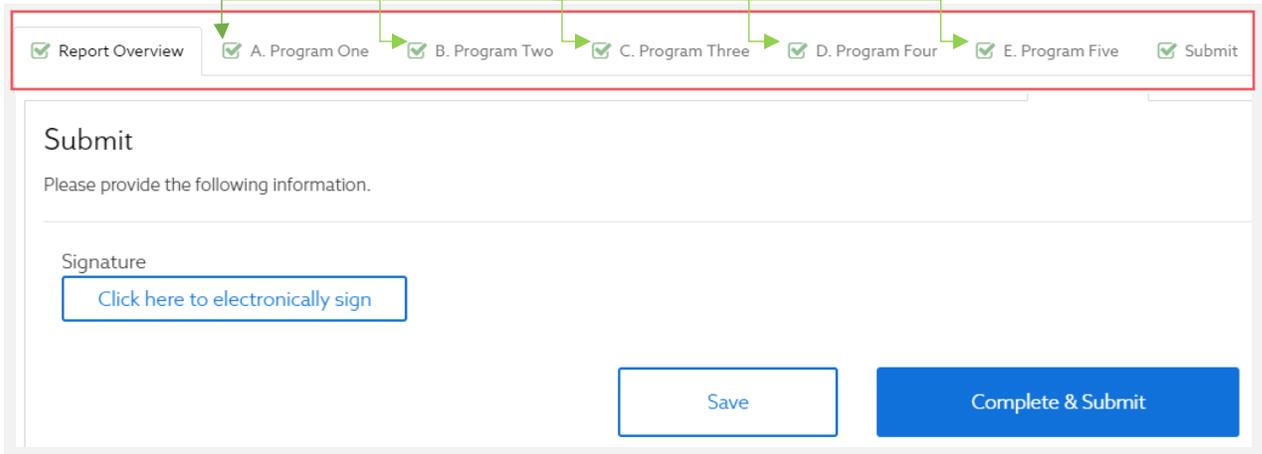 | ☐ A. Program One | ☐ B. Program Two | ☐ C. Program Three | ☐ D. Program Four | ☐ E. Program Five | ☐ Submit |
   |---|---|---|---|---|---|
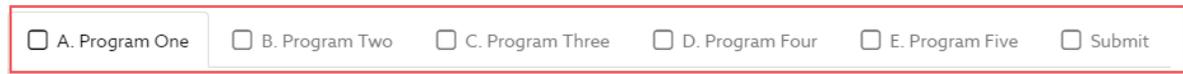
2. The report will automatically start with Program One. You will be asked to provide information on:
   - **Program Information**: Program/Activity Type, Program Activity/Name, Strategy, and IOM Category
   - **Population Risk Factors**
   - **Cohort Information**: Total Number of Cohorts Completed During the Quarter, Total Number of Sessions Completed During Quarter, and Total Number of Participants During the Quarter *(note: these numbers are not cumulative – only include the total number of cohorts/sessions completed in the period/quarter for which you are currently reporting on).*
   - **Participants by Race, Ethnicity, and Gender**
   - **Program Fidelity**: Answer a series of questions about the delivery and quality of the program curriculum and sessions. Identify and explain any improvements or changes.
   - **Any Additional Comments**
   - **Documentation**: Grantees have the option to upload additional documentation. This could potentially include photographs of events, narratives about program activities, or attendance records spreadsheets. It is <u>not</u> required for grantees to upload their Attendance Records Spreadsheets; the spreadsheet is intended to be a resource to support grantees in tracking the information that is required for their activity reports. The Attendance Records Spreadsheets tool can be found under the *DOCUMENTS* tab on the left-hand navigation menu in Neighborly or accessed via this **LINK.**

3. **When you finish reporting on *Program One* you can either select *Save* to save the report and complete it at a later date, or *Complete & Continue* to report on additional programs/activities and/or proceed to submit your report.**

Save	Complete & Continue
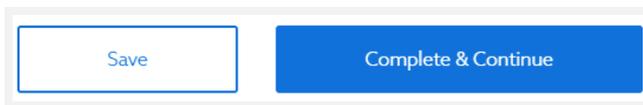
Continued on next page…

4. **Next, if you want to report on additional programs/activities and/or proceed to submit your report, scroll up to the top of the Reporting page.**

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

| ☑ Report Overview | ☑ A. Program One | ☑ B. Program Two | ☑ C. Program Three | ☑ D. Program Four | ☑ E. Program Five | ☑ Submit |

Submit

Please provide the following information.

Signature

Click here to electronically sign

Save | Complete & Submit

Pre-Post Survey Information for Grantees with Direct Service Programs

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

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

1. **Review the following documents for Survey Administration Instructions:**
   - **[Instructions for Survey Administration for Prevention Programming](#)**
   - **[Parental Consent Policy](#)**
2. **Obtain or Request Surveys**
   - **Paper-Based Surveys –** ODP automatically creates individualized pre- and post-surveys specific to each provider and program in <u>paper format</u>. **The SUPTRS Projects Director will email individualized PDF survey documents to each provider by August 4, 2023.**

   - **Online Computer-Based Surveys –** ODP provides an online computer-based pre- and post-survey option for all of our grantees that are implementing curriculum-based direct service programs <u>upon request</u>. Please complete this form to request online pre-post surveys: **https://form.jotform.com/IdahoODP/survey-request-form**

If you have any questions or concerns regarding the surveys, please contact Jessie Dexter at jessie.dexter@odp.idaho.gov.

CPS and PPS Credentials

To increase the number of qualified providers of substance misuse prevention services in Idaho, ODP requires that at least one staff member in each agency or organization awarded SUPTRS funds must hold or obtain a Provisional Prevention Specialist (PPS) and/or Certified Prevention Specialist (CPS) credential.

- Grantees that <u>have received SABG/SUPTRS Block Grant funding for Primary Prevention Programs for the past two consecutive years</u> are required to provide documentation that either:
  a) At least one staff member at your organization holds a current CPS credential, OR
  b) At least one staff member at your organization is pursuing their CPS credential. This is demonstrated by providing documentation of staff training that was completed in an effort to obtain the required training hours to sit for the CPS exam.

- New grantees, <u>that have not been funded consecutively in the past two years</u>, have 120 days to receive a PPS credential. The PPS credential requires the completion of two free, short courses: 1) *Substance Abuse Prevention Ethics;* and 2) *Fundamentals of Prevention.* Both courses are offered via **[ODP's online Learning Management System](#)**. Send copies of the course Certificates of Completion to Jessie Dexter at jessie.dexter@odp.idaho.gov to receive your PPS certificate.

Additional information about the CPS and PPS certifications can be found [here](#).

Additional information on ODP's Learning Management System can be found on the next page (pg 10).

ODP Learning Management System and Training Opportunities

ODP is pleased to provide <u>free</u> online courses to support SUPTRS grantees, and other prevention partners, in obtaining the training hours for the fulfillment of the Provisional Prevention Specialist (PPS) and Certified Prevention Specialist (CPS) requirements through our learning management system.

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

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

ODP plans to add additional courses to the learning management system in FY24. Updates on new courses will be shared with all grantees as they become available.

Learn more about ODPs learning management system, available online courses, and find instructions for registering, accessing courses, downloading Certificates of Completion, and navigating the platform at **www.prevention.odp.idaho.gov/training**

ODP Monthly Newsletter

ODP provides updates on upcoming trainings, events, funding opportunities and other resources each month via our Monthly Newsletter. You can subscribe to the Newsletter, and view past Newsletters, at **https://odp.idaho.gov/newsletter**

For more grantee information and resources, visit www.prevention.odp.idaho.gov/provider-information