



2016- 2017

**South Dakota Tobacco Control Program [SD TCP]
Community/School Partnership Grant**

Catalyst Walkthrough

September 19, 2016

APPLICATION DEADLINE: October 7, 2016 @ 5 pm Central Time

Catalyst is hosted by the SHPR Group. Technical Assistance for Catalyst is provided through the Catalyst Help Center (<https://help.catalystserver.com>), email (support@shpr.com), or by phone (770.935.0958).



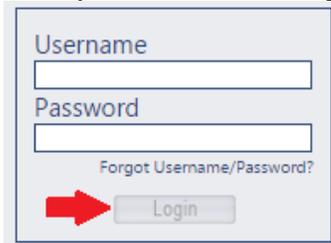
SD TCP Community/School Partnership Grant Application Timeline

2016-2017

September 19, 2016	Grant Application Release
September 23, 2016	<u>Submission Deadline for Questions</u> Questions for the Technical Assistance conference calls must be received by 5:00 p.m. Central Time
September 27, 2016 September 28, 2016	<u>Technical Assistance Conference Calls</u> 9/27 @ 9:30 am Central Time 9/28 @ 1:30 pm Central Time
October 7, 2016	<u>Submission Deadline for Application</u> Grant applications must be submitted and finalized within Catalyst by 5:00 p.m. Central Time
November 1, 2016	<u>Tentative Award Notification</u> Applicants will be notified of funding decisions by email
November 1, 2016	Grant awards must be accepted by the grantee within Catalyst
November 1 2016 – May 31, 2017	Grant cycle
May 31, 2017	<u>Final reports due</u> All grant funds must also be expended

How to access Catalyst

1. Open web browser. Make sure your browser is the most recent version. Mozilla Firefox, Google Chrome, and Internet Explorer are all compatible with Catalyst.
2. Go to www.catalystserver.com
3. Enter your username and password. Click “Login” to log into Catalyst, as shown below.



If you are a new applicant and/or do not have a Username and Password for Catalyst, email DOH.info@state.sd.us with the subject line “Tobacco Grant Log-In” and include the following information in the body of your email:

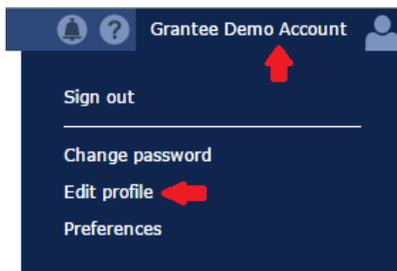
- First and last name
- Position/Title
- Email address
- Organization name
- Organization address
- Phone number

A representative from Catalyst will then email you a Catalyst username and temporary password with instructions on how to change your temporary password.

Edit Profile/Organization Information

Once you have logged into Catalyst, you will need to update your organization information and contact information.

1. Click on your name next to the symbol of a person in the upper right corner of the page and click “Edit Profile.”



2. Organization Information: Update all your organization fields and click the “Save” button. **Note: This will update the information across all of Catalyst for your organization, NOT your personal information.**
3. Contacts: Update or add a new contact to include your personal information.

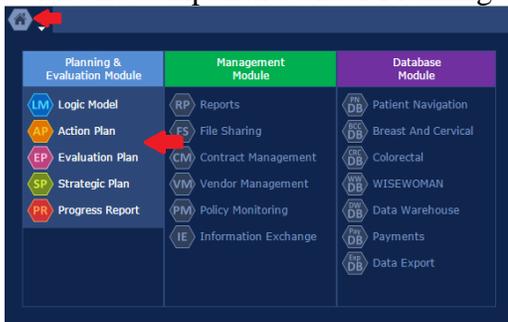
- Add Contact: Click “Add New Contact,” complete the information, and click the blue checkmark to save.
- Update Contact: Click pencil to edit your contact information, and click the blue checkmark to save.

+ Add New Contact				
	Contact Type	First Name	Last Name	
▶	Administration	Betty	Sue	✗
▶	Billing	John	Thomas	✗

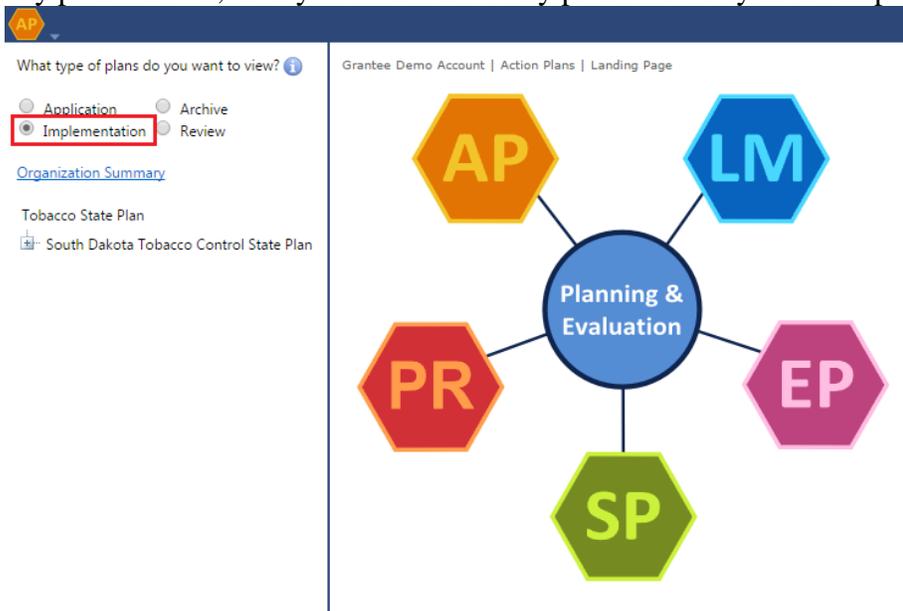
+ Add New Contact

Adding the Grant Application

- Click on the Home Menu icon in the upper left corner of the header.
- Select the components under Planning & Evaluation Module, as shown below.



- You are automatically directed to your Organization Landing Page. By default, plans in the Implementation phase are shown in your Navigation Tree on the left. If there are not any plans shown, then you do not have any plans currently in the Implementation Phase.



- Select the “Application Phase” radio button and then click on the “Organization Summary” link to access the available applications.

What type of plans do you want to view? Grantee Demo Account | Action Plans | Landing Page

1. Application Archive
 Implementation Review

[Organization Summary](#) ← 2.

There are currently no plans of this type to display. Click on "Organization Summary" to add plans to your application.

Planning & Evaluation

AP LM PR SP EP

- On the Organization Summary Page you can add applications to your organization. Please make sure you read the Application Instructions, as they provide guidance for the Application Section.
- The Application Section is where all the available applications are listed. To add a new application, click the “Add To Application” button. The application will appear in the Navigation Tree on your left.

What type of plans do you want to view? Grantee Demo Account | Action Plans | Organization Summary

Application Archive
 Implementation Review

There are currently no plans of this type to display. Click on "Organization Summary" to add plans to your application.

Finalized Applications
 Click the "+" sign to expand this section

Application Instructions

To begin the application process, click next to any plan to add it to your applications. To access a plan item, click to expand the Navigation Tree on the left side of the screen and select the item.

To add all opted out items back to your plan, click next to the plan. Any data that has been entered for this plan will not be affected.

If there are any warnings associated with your application, a will be displayed next to the plan. Positioning your mouse over this icon will display a list of warning messages.

To remove a plan from your applications, click next to the plan. Any data that has been entered for this plan will be deleted.

Applications are displayed below in groups. Once you have finished filling out and submitting applications for a particular group, you must return to this page and use the button to finalize your application submissions for that group.

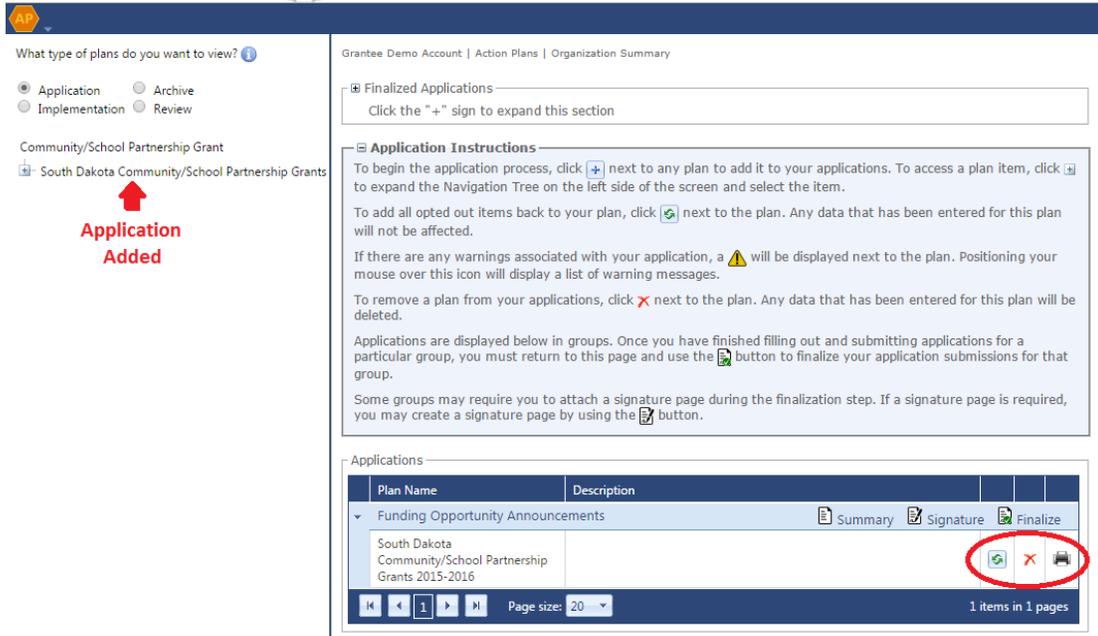
Some groups may require you to attach a signature page during the finalization step. If a signature page is required, you may create a signature page by using the button.

Applications

Plan Name	Description
Funding Opportunity Announcements	
South Dakota Community/School Partnership Grants 2015-2016	

Page size: 20 1 items in 1 pages

- The newly added application will appear in the navigation tree to the left. Plans you have selected to apply for have the “Reset Application”  button, “Abandon Application”  button and the “Print”  button.



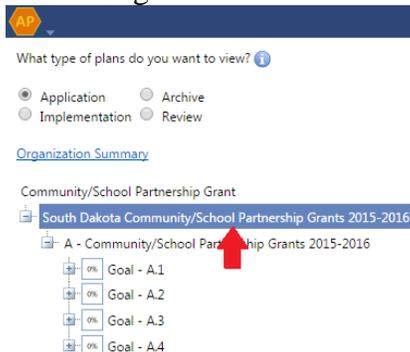
Steps to Completing your Application

Once you have selected a plan to apply for, you will need to take the following four steps before submitting and finalizing the application.

- Step 1 - Build your application
- Step 2 - Provide responses to all items in the Catalyst Online Application Form
- Step 3 - Attach a budget
- Step 4 - Attach all Required Supporting Information, as described in the Grant Guidance

Guidance for your application can be found on the “Plans Detail Page” under the Attachment Section.

- Click on the name of the application in the Navigation Tree to be directed to the “Plan Detail” Page.

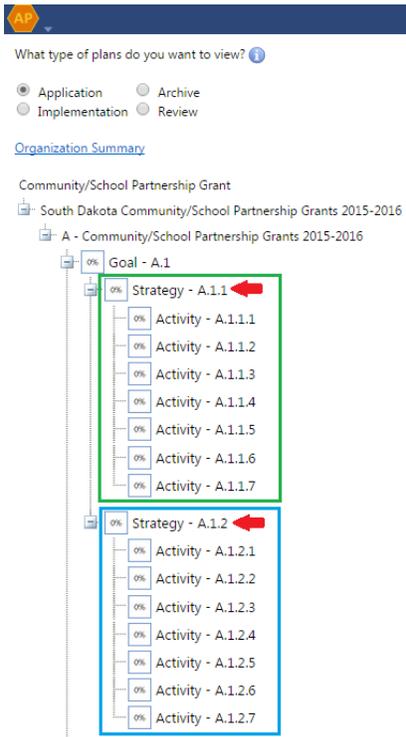


2. Scroll down to the “Attachment Section” and click the “Download” to view the guidance.

Attachments					
+ Add Attachment					
	Name	Description	External Grantee	File	
	Budget Worksheet	Use this excel document in order to formulate your budget request.		Download	✗
	Grant Guidance	This document provides guidance for the 2016-2017 SD Community/School Partnership Grant.		Download	✗
	Catalyst Walkthrough	This document provides guidance on how to apply for the SD Community/School Partnership Grant within Catalyst.		Download	✗
	Application Outline	This document is a basic outline of the SD Community/School Partnership Grant Application.		Download	✗
+ Add Attachment					
Page size: 10			4 items in 1 pages		

Step 1 - Build your Application

The application contains four Goal Areas. You need to select at least one Strategy under each Goal Area for your application. For more clarification, see the “Grant Guidance” in the Application Guidelines section on page 3. When you select a Strategy, you will be required to work on the Activities listed under that Strategy, unless otherwise noted. For example, under Goal A.1 you need to select at least one of the two strategies indicated by the red arrow below. When you select a Strategy, the activities are tied to that Strategy, as shown below in the green and blue boxes. **(Note: Under Goal Area 4, applicants must select at least one activity that is specific to a priority population. The activity must focus on a priority population beyond youth/young adults. For example, you could work with youth/young adults who use spit tobacco.)**



There are a few Strategies where there is an Optional Activity; however, the other activities listed in that Strategy are required. If the Activity description within Catalyst states that it is optional, you may choose to either “Opt Out” of the Activity or keep it in your application.

ID	Description
A.2.2.1	Provide South Dakota QuitLine educational resources
A.2.2.2	Educate staff on the South Dakota QuitLine and how to refer their patients.
A.2.2.3	Optional: Provide Quit Kits

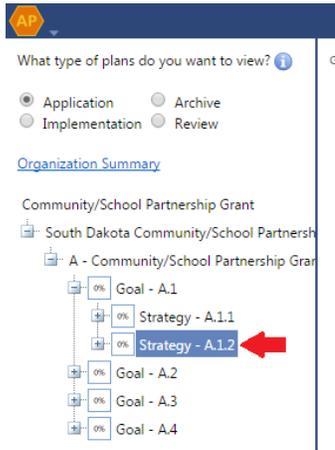
The Activities that are optional are listed below:

- A.2.2.3
- A.2.3.3
- A.2.4.3
- A.2.4.4
- A.3.1.3
- A.4.1.3
- A.4.1.4
- A.4.2.3

To beginning building your application follow the process below.

1. You can expand the items in your navigation tree by clicking . By expanding the items, you will be able to see all items of the application/plan. Items in a plan have a status box  next to them. Clicking on the item will allow you to see elements of that item for the application on the right hand side of the screen, as shown below.

After you have reviewed the application, click on the Strategy in the Navigation Tree you **DO NOT** want to include in your application.



- To remove a Strategy from your application, click on the  button on the bottom right hand side of screen. **Note: Make sure you have selected the correct Strategy you wish to remove from your application.** If you need to restore items that you “Opt Out” of, click the refresh button on the Organization Summary Page.
- Once you have opted out of the Strategies you **DO NOT** wish to include in your application you are ready to move to the next step.

Step 2 - Providing responses to items

- Elements that the applicant/grantee will need to fill out will be provided in the Grant Guidance supplied by the Tobacco Control Program. Type in any information that is requested in the Custom Fields section. Make sure you complete all the fields for your application. Click “Save” at the bottom of the item. **Note: You are able to save your responses and return later to edit your response.**

A screenshot of a web form titled "Custom Fields". The title is circled in red. The form has several sections: "Choose the one that applies" with six checkboxes (K-12 institution, Worksite, Headstart, Post-secondary institution, Community organization, Child-care); "Name of facility(s)" with a text input field; "Discipline: Review the activities attached to this strategy and describe your plan to implement them." with a larger text area; "Lead personnel" with a text input field; and "Time Frame" with a dropdown menu. At the bottom, there's a "Related Activity" section with a "+" sign and a note "Click the '+' sign to expand this section". Below the form, there are two buttons: "Opt Out" and "Save". A red arrow points to the "Save" button.

Step 3 - Attach a Budget

1. Using the excel template provided, formulate your budget request. Applicants must provide sufficient budget narrative to justify costs to achieve strategies selected. Partnerships may request to use up to 10% of their grant award to cover ancillary costs such as meeting expenses and educational incentive items. **Provide detailed justification for the amount of stipend requested.** Travel expenses related to TCP sponsored trainings such as the Spring Tobacco Control Institute will be reimbursed directly by the Tobacco Control Program and do not need to be included in your budget request.
2. **The Budget Worksheet must be uploaded to the “Attachment” section of the Catalyst “Application Submission” page.**

Attachments

Name	Description	External Grantee	File
New Attachment - Add			
Name:	<input type="text"/>		
Description:	<input type="text"/>		
File:	<input type="text"/>	<input type="button" value="Select"/>	

No records to display.

Page size: 10 | 0 items in 1 pages

Step 4 - Attachments: Required Supporting Information

As highlighted in the Grant Guidance, you will need to include all Required Supporting Information and upload it as **one** PDF Attachment in order for the application to be considered acceptable. For more clarification, see page 6 of the Grant Guidance document.

1. Click on the name of the application in the Navigation Tree to be directed to the “Plan Detail” Page.



2. Scroll down to the “Attachment” section and click “Add Attachment.”

The screenshot shows the 'Attachments' section of the application. At the top, there is a '+ Add Attachment' button. Below it is a table with columns: Name, Description, External Grantee, File, and an empty column. The table is currently empty. Below the table, there is a 'New Attachment - Add' form. The form has three input fields: 'Name:', 'Description:', and 'File:'. The 'File:' field has a 'Select' button next to it. Below the form, there are two checkboxes: one checked and one unchecked. At the bottom of the form, it says 'No records to display.' Below the form, there is another '+ Add Attachment' button. At the very bottom, there is a pagination bar with a 'Page size: 10' dropdown and '0 items in 1 pages'.

3. Type in the Name and Description of the item to be attached. Click to select the document to upload and attach. When the document has been uploaded, click to save the attachment.

Review your application

Once you completed all steps, you should to review your entire application and each step to make sure your application is complete before you submit. The steps are listed again below.

Step 1 - Build your application

Step 2 - Provide responses to all items in the Catalyst Online Application Form

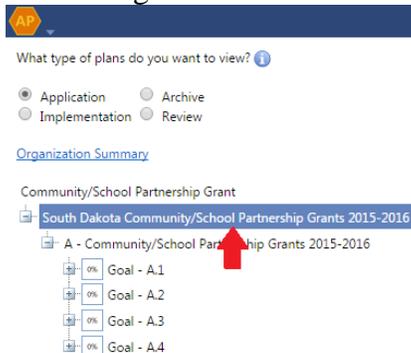
Step 3 – Attach a budget

Step 4 - Attach all Required Supporting Information, as described in the Grant Guidance

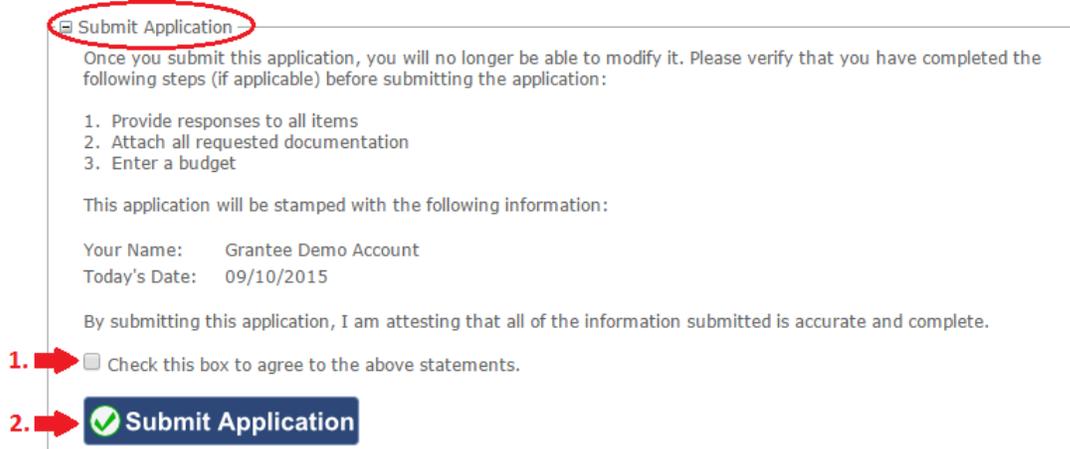
Submit your application

After verifying that your application is complete according to Grant Guidance, you can submit your application.

1. Click on the name of the application in the Navigation Tree to be directed to the “Plan Detail” Page.



2. Under the Submit Application section on the left side of your screen, carefully read the instructions. **Note: Once you submit your application, you will no longer be able to edit the application, the responses, the budget or attachments.**

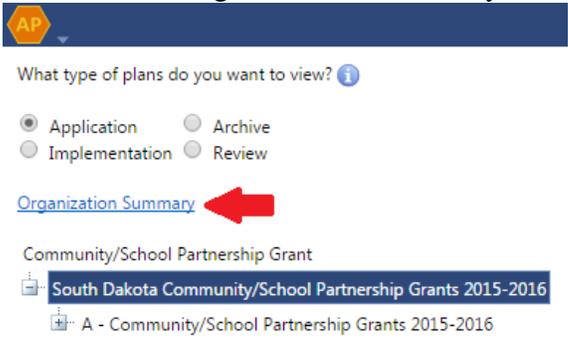


- If you can attest that all the information in the application to be submitted is accurate and complete, check the box and click . *Note: Once you submit your application, you will no longer be able to edit the application, the responses, the budget, or attachments.*

Finalize your application

Once you have submitted, you are ready to finalize your application. This is the final step in applying for the grant.

- Sign the Signature Page:** The grant application must be signed by the Partnership’s fiscal agent and the grant facilitator.
- Click on the “Organizational Summary” link



- In the Application Section, click the “Signature” button to download your signature page. Print out the page and get the required signatures. Scan the document and save to your computer.



- Once your signature page is complete, click the “Finalize” button.



5. The “Finalize Application” pop-up window will appear, as shown before. Carefully read the instructions.
6. Upload your signature page by clicking “Select” and attaching the signature page.
7. Answer the OMB Circular A-133 question.
8. Click the “Finalize application” button.

Finalize Applications

Instructions

This is the final step of submitting your Funding Opportunity Announcements applications.

Once you complete this step, you will no longer be able to modify any of these applications. Please verify that you have completed and submitted all of your applications before proceeding.

Please fill in the form below and then click the "Finalize Applications" button.

This step will be stamped with the following information:

Your Name: Grantee Demo Account
Today's Date: 09/10/2015

Upload the signature page

1.

Was your agency required to have an OMB Circular A-133 single audit completed in the prior calendar year? ⓘ

2.

3.

A message will appear confirming that your application was finalized and will be processed by SD TCP. You will still be able to view or print your application, budget and any attachments after the application is finalized, but will no longer be able to edit content or add attachments.