2016-2017
South Dakota Tobacco Control Program [SD TCP] Disparities Grant

Catalyst Walkthrough
February 1, 2016

APPLICATION DEADLINE: March 1, 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@catalystserver.com), or by phone (770.935.0958).

SHPR GROUP
collaborative solutions

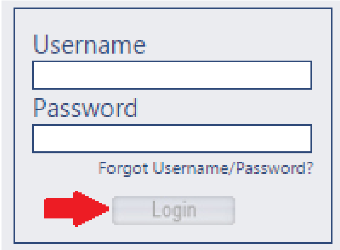
SD TCP Disparities Grant Application Timeline

2016-2017

February 1, 2016	Grant Application Release
February 5, 2016	Submission Deadline for Questions Questions for the Technical Assistance conference calls must be received by 5:00 p.m. Central Time
February 9, 2016 February 17, 2016	Technical Assistance Conference Calls 2/9 @ 1:30 pm Central Time 2/17 @ 9:30 am Central Time
March 1, 2016	**Submission Deadline for Application** Grant applications must be **submitted** and **finalized** within Catalyst by 5:00 p.m. Central Time.
March 30, 2016	Tentative Award Notification Applicants will be notified of funding decisions by email.
April 29, 2016	Grant awards must be accepted by the grantee within Catalyst by 5:00 p.m. Central Time.
June 1, 2016 - May 1, 2017	Grant Funding Cycle All grant funds must be expended during this time.
May 31, 2017	Final Reports Due

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:

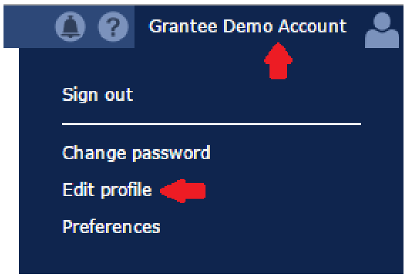
- First and last name
- Position/Title
- Email address
- Organization name
- Organization address
- Phone number

After the information is received, a representative from Catalyst will email you a Catalyst username and temporary password with instructions on how to change your temporary password.

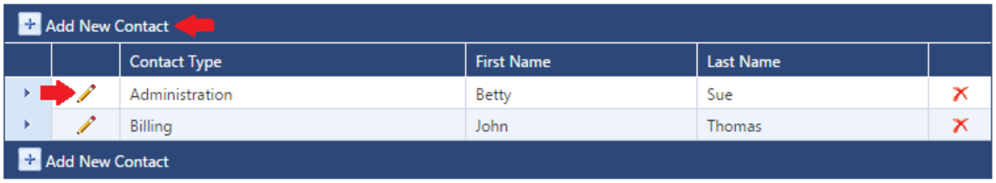
Edit Profile/Organization Information

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 on the Function Bar and click "Edit Profile."



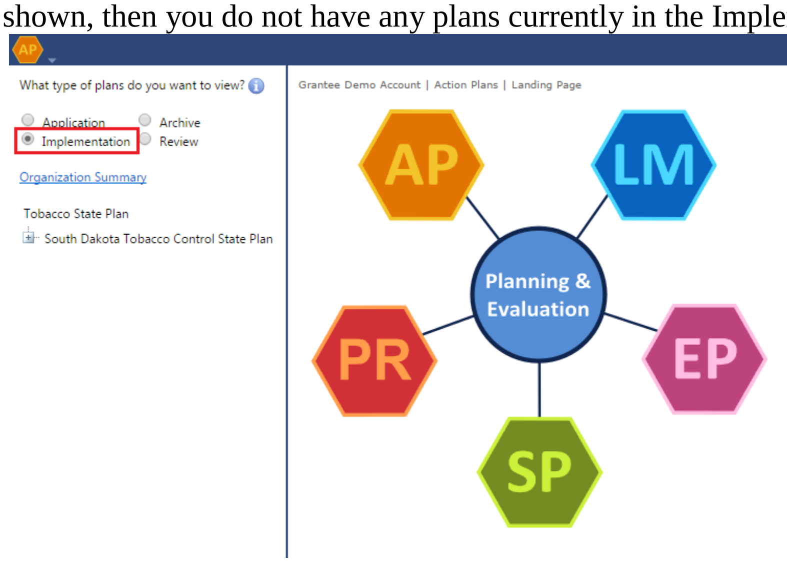
2. Organization Information: Update all your organization fields and click the “Save” button. ***Note: This will update the information across all of Catalyst for your organization, NOT your personal information.***
3. Contacts: Update or add a new contact to include your personal information.
   a. Add Contact: Click “Add New Contact,” complete the information, and click the blue checkmark to save.
   b. Update Contact: Click pencil to edit your contact information, and click the blue checkmark to save.



Adding the Grant Application

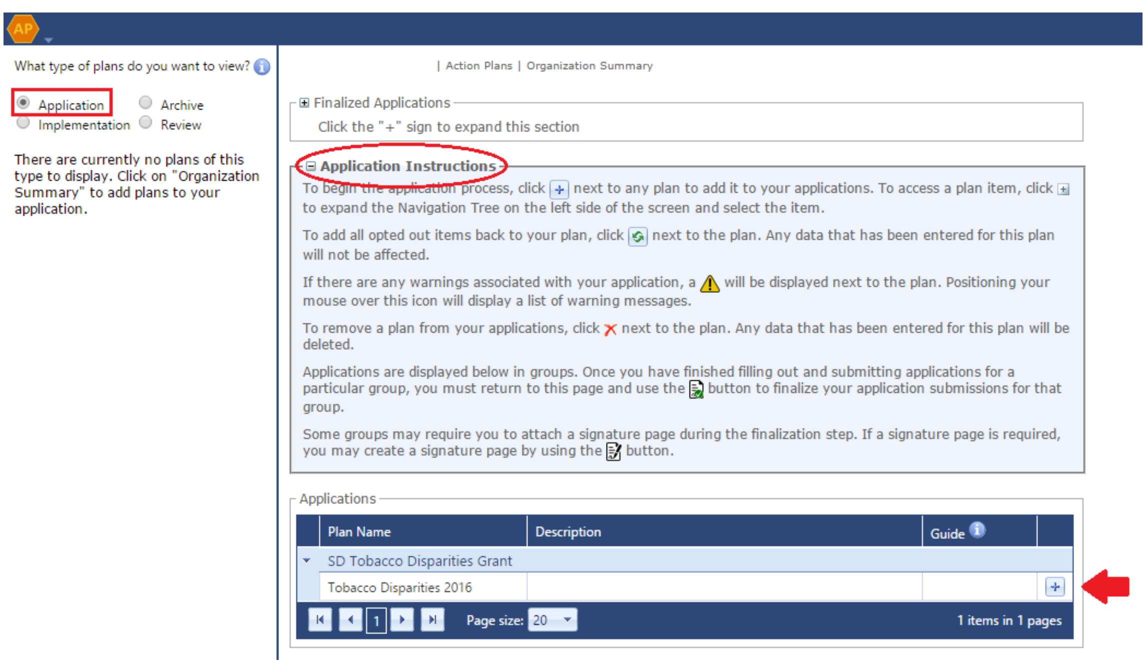
1. Click on the Home Menu icon in the upper left corner of the Function Bar.
2. Select the components under Planning & Evaluation Module, as shown below.

3. 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.

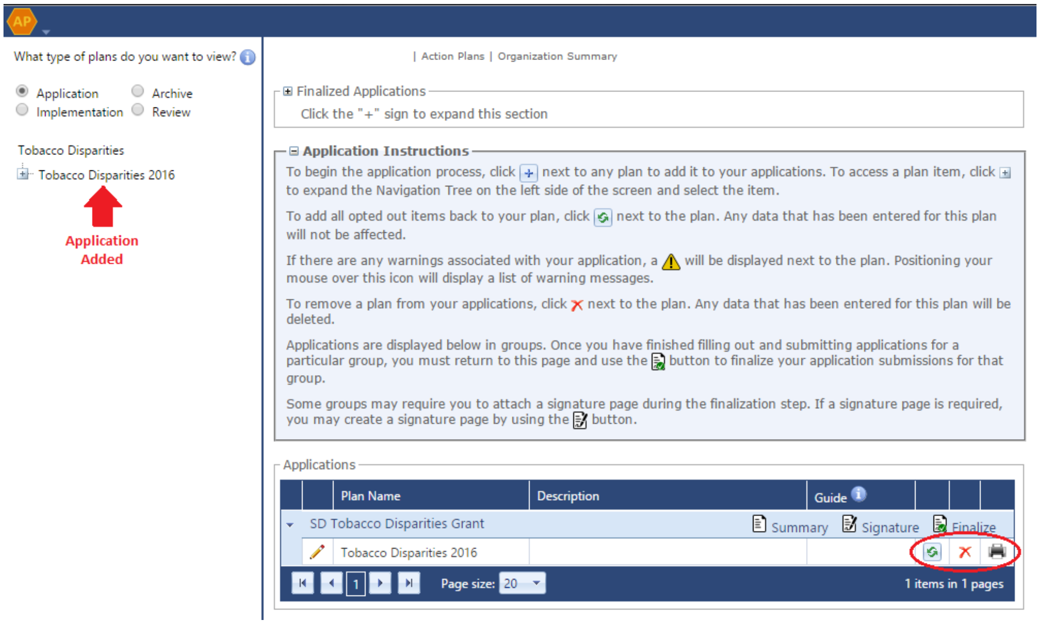


4. Select the “Application Phase” radio button. All applications that are currently being applied for will appear in the Navigation Tree. To add a new application, click on the “Organization Summary” link to access the available applications.

5. 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.
6. 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 the left side of the page.



7. 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

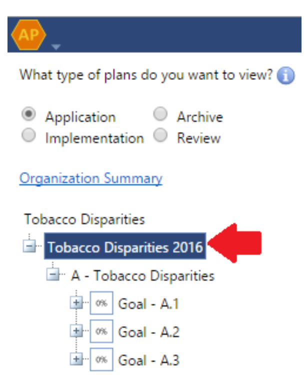
Step 2 - Provide responses to all items in the Catalyst Online Application Form

Step 3 - Enter a budget

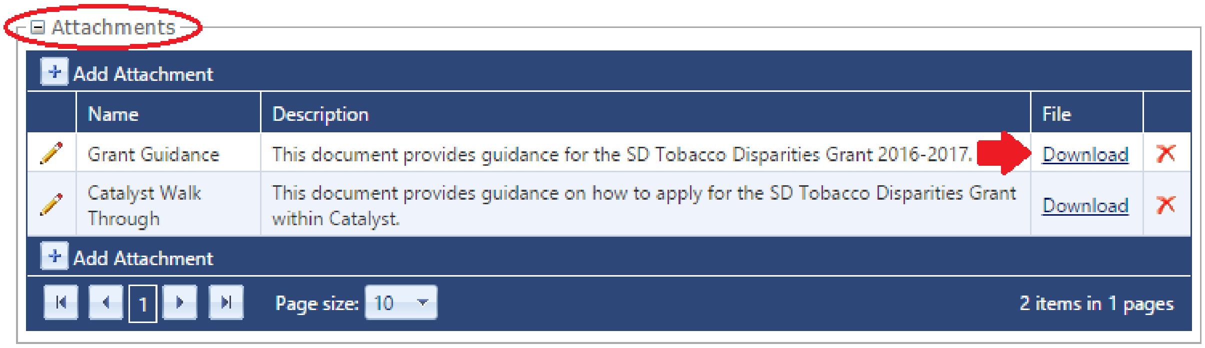
Step 4 - Attach all Required Supporting Information, as described in the Grant Guidance

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

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

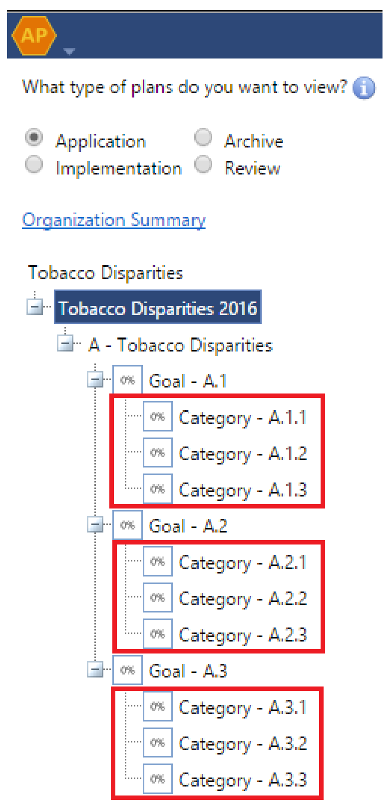


2. Scroll down to the “Attachment Section” and click the “Download” to view the guidance.



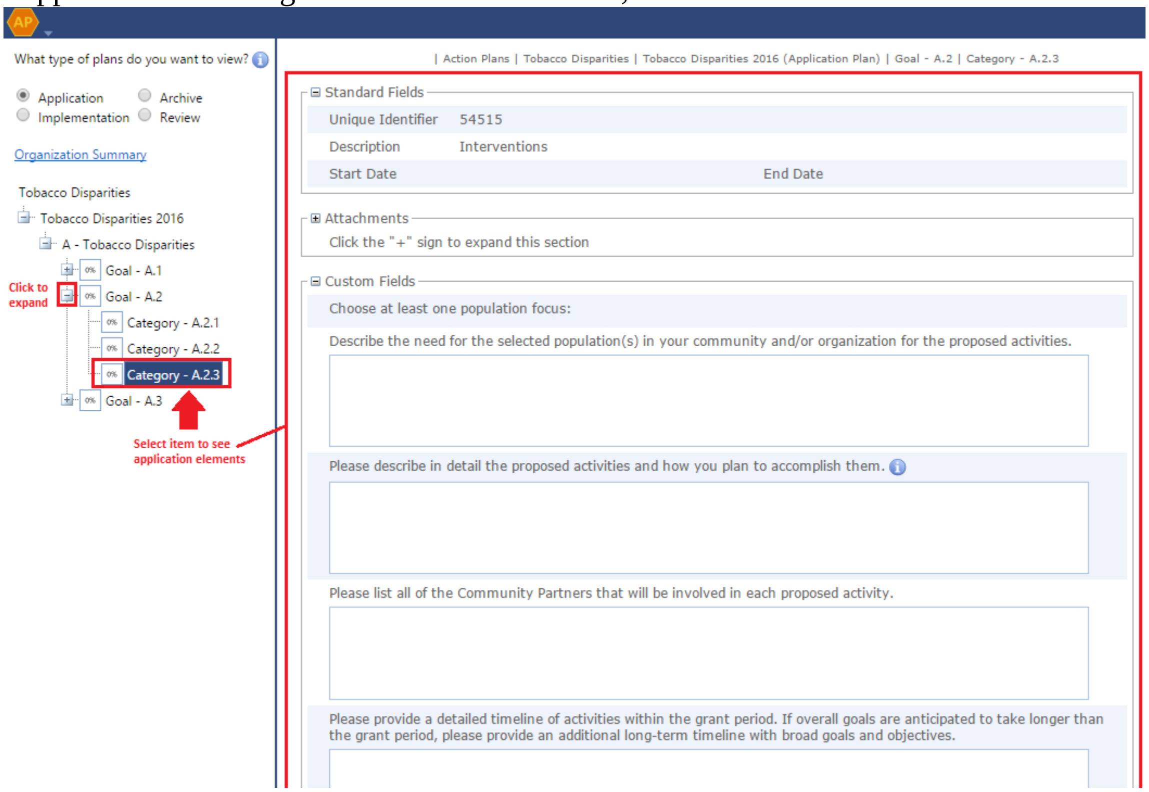
Step 1 - Build your Application

The application contains three Goal Areas: Prevention, Cessation, and Secondhand Smoke. Within each Goal Area, there are three Categories under which you can plan activities: Policy, Education, and Interventions. You must select at least one Category, within at least one Goal Area. For more clarification, see the “Grant Guidance” in the Application Guidelines section. When you select a Goal Area, you must then select at least one of the Categories to work on.



To begin building your application follow the process below.

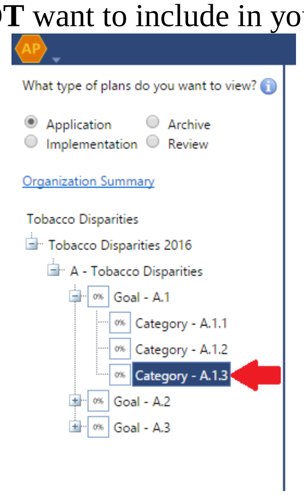
1. You can expand the items in your navigation tree by clicking ⊞. By expanding the items, you will be able to see all items of the application/plan. Items in a plan have a status box next to them. Clicking on the item will allow you to see elements of that item for the application on the right hand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



Opting Out

For those Goal Areas and/or Categories that you do NOT wish to work on, you may choose to "Opt Out" to remove the Goal Area/Category from your application.

1. After you have reviewed the application, click on the Goal Area or Category in the Navigation Tree you **DO NOT** want to include in your application.



2. To remove a Goal Area or Category from your application, click on the 

button on the bottom right hand side of screen. ***Note: Make sure you have selected the correct Goal Area or Category 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.
3. Once you have opted out of the Goal Areas or Categories you **DO NOT** wish to include in your application you are ready to move to the next step.

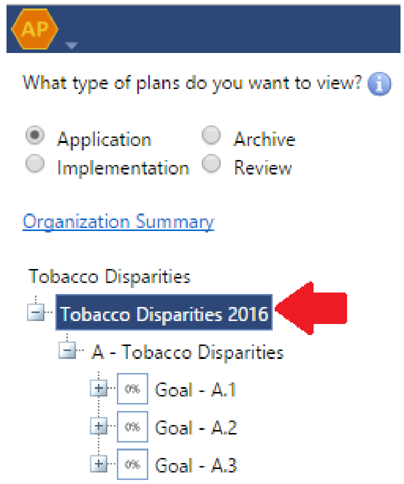
Step 2 - Providing Responses to Items

1. Elements that the applicant/grantee will need to complete 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 every time a change is made. ***Note: You are able to save your responses and return later to edit your response.***

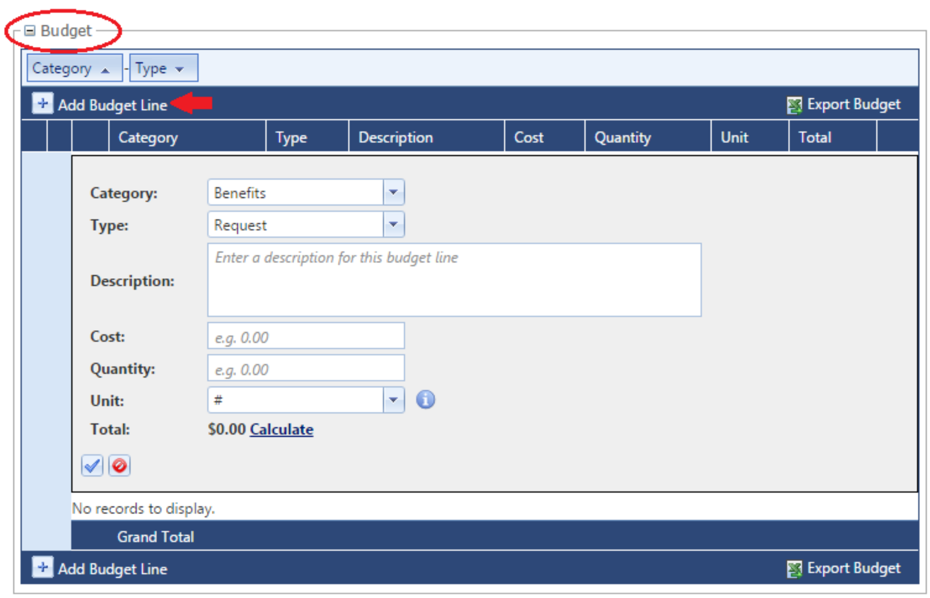
Step 3 - Enter a Budget

Note: Only the Vendor Administrator or Fiscal Administrator for the organization will be able to view or make edits to the Budget section.

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 "Budget Section" and click Add Budget Line. The budget line form will appear.



3. Formulate your budget request within the Catalyst system by creating a budget line <u>for each expense within each proposed activity</u>.
    a. <u>Category</u>: You are to use the following Categories: Other, Salary, Supplies, and Travel. **Please note: Categories not applicable to this grant are: Benefits, Capital Equipment and Health Services**.
        - All costs related to proposed activities, such as supplies, promotion, media, etc. should be requested using the <u>Supplies</u> category.
        - Provide ample justification for the amount of stipend requested. Include stipend under the <u>Salary</u> category.

- Travel expenses related to 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.

b. Type: All budget line “Type” will be set as a Request.
c. Description: Applicants must provide sufficient budget narrative to justify costs to achieve strategies selected. **In the description section, please include the goal and category number (ex: A.2.1) and explain how the funds will be used.**
d. Cost: Enter the cost for the budget line.
e. Quantity: Enter the number or percent for the cost.
f. Unit: List the number (#) of times you need this amount for the budget line. If this line is for a Salary list the percent (%) of the individual’s salary proposed to be provided by this grant.

Note: You can click “Calculate” to see the final amount you are adding for this budget line.

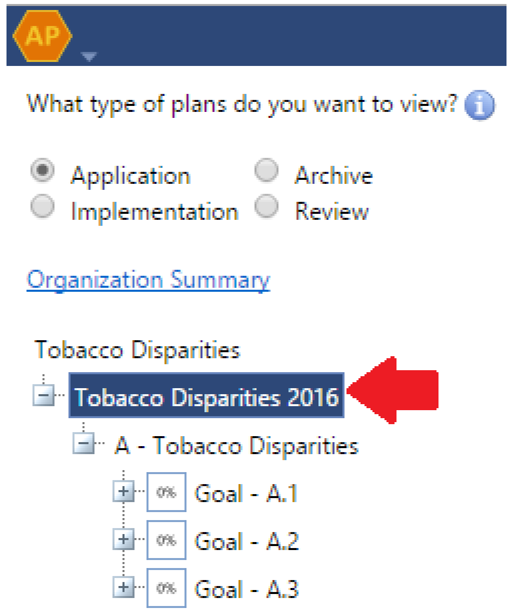
4. Click the ☑ mark to save the budget line. Repeat for each budget line.

NOTE: Please create a separate budget line for each expense (i.e. Salary, Supplies) within each proposed activity.

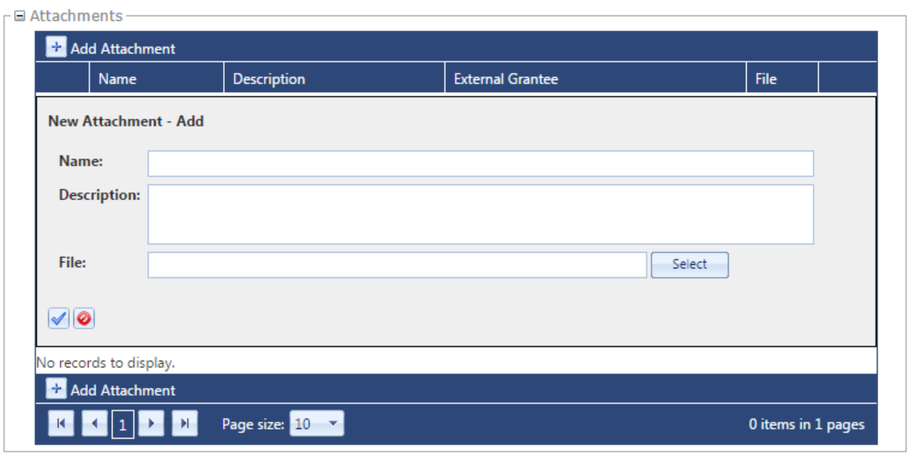
Step 4 - Attachments: Required Supporting Information

As highlighted in the Grant Guidance, you will need to include all Required Supporting Information and upload it as PDF Attachments in order for the application to be considered acceptable. For more clarification, see the “Grant Guidance” in the Application Guidelines section.

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.”



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

Review your application

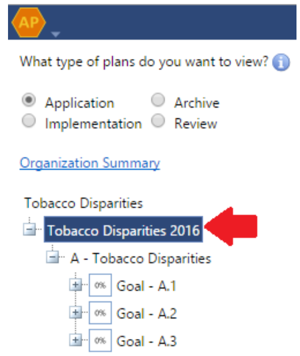
Once you completed all steps, you should to review your entire application and each step to make sure your application is complete before you submit. The steps are listed again below.

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

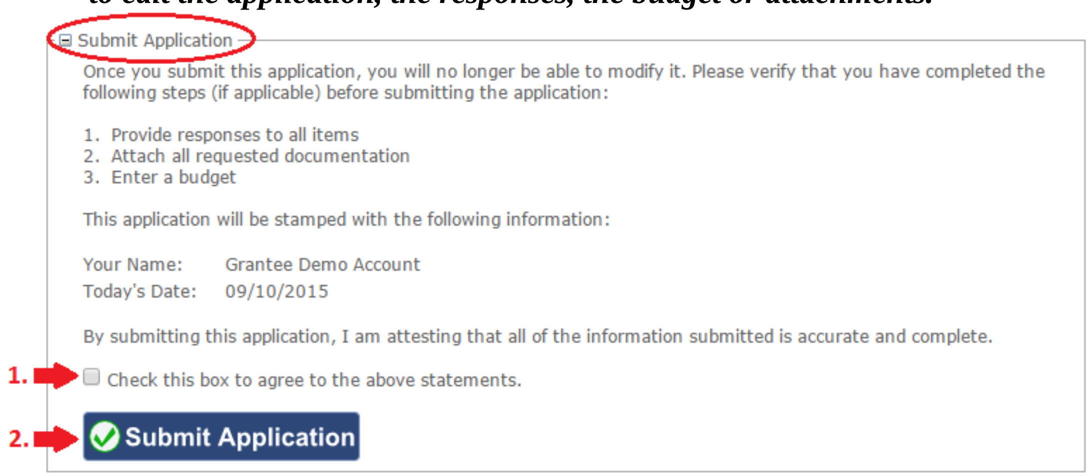
Submit your application

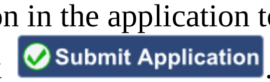
After verifying that the application is complete according to Grant Guidance, the Vendor Administrator or the Application Guide for your organization can submit the application.

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.***



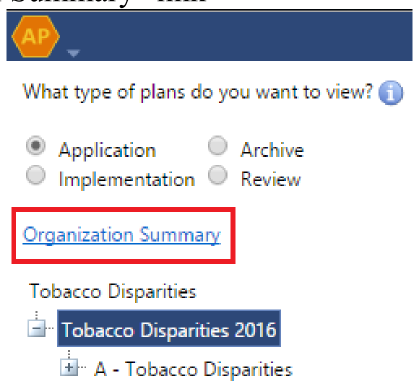
3. If you can attest that all the information in the application to be submitted is accurate and complete, check the box and click . ***Note: Once you submit your application, you will no longer be able to edit the application, the responses, the budget, or attachments.***

Finalize your application

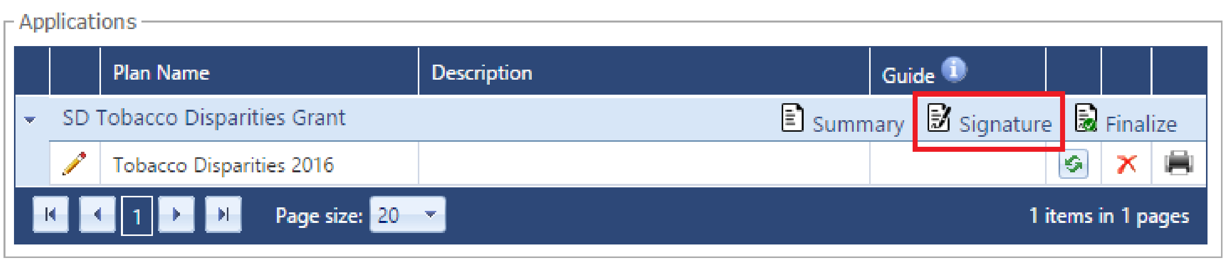
Once you have submitted all the applications your program plans to apply for, the Vendor Administrator can finalize your applications. This is the final step in applying for the grant.

Note: Applications should not be finalized until ALL applications have been submitted. Finalizing is only done once and applies to all applications as a group and is not done individually.

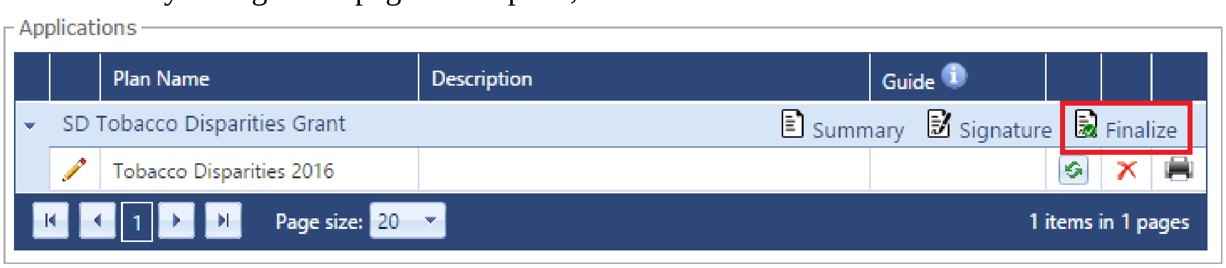
1. **Sign the Signature Page:** The grant application must be signed by the applicant's fiscal agent and the grant facilitator.
2. Click on the "Organizational Summary" link



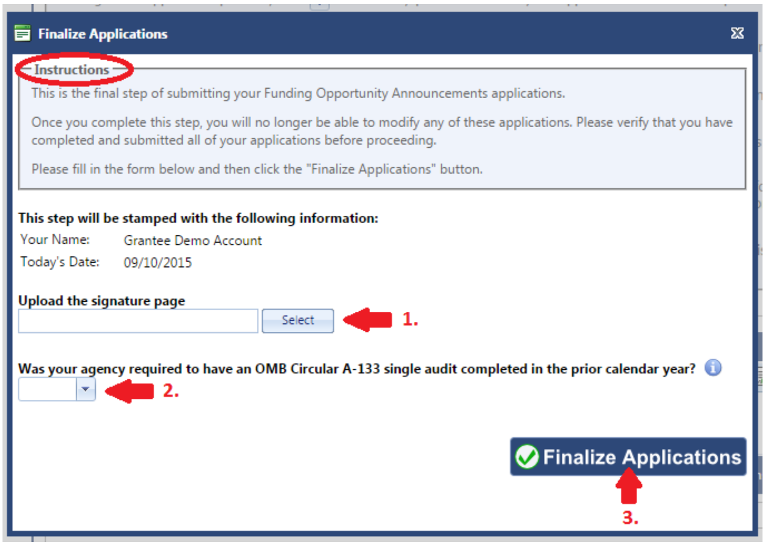
3. In the Application Section, click the "Signature" button to download your signature page. Print out the page and get the required signatures. Scan the document and save to your computer.



4. 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.



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.