State Opioid and Stimulant (SOS) Response Grant Quarterly Reporting

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Overview

The SOS Quarterly Report is a compilation of multiple reporting instruments for the State Opioid and Stimulant Response Grant. The report consists of 4 parts:

- **SOR/TOR Instrument** is an instrument that collects information on prevention, education, and harm reduction services conducted by SOS agencies funded wholly or in part by the SOS grant. This instrument is fielded every quarter.
- **SOR/TOR Sub-Recipient Report** is used to report on the expenditure amounts and types of services provided by SOR/TOR grant sub-recipients during the previous fiscal year. Sub-recipients are entities that receive SOR/TOR funds directly through a sub-award from the state/territory/Tribal entity. This instrument is fielded annually after Quarter 2.
- **The Tangible Personal Property Report (TPPR)** must be completed by grantees as a part of close-out to account for tangible personal property. The TPPR is fielded annually after Quarter 1. Tangible personal property for this purpose is as follows per SAMHSA: (1) Acquired equipment with an acquisition cost of $5,000 or more (2) Residual inventory of unused supplies with a total aggregate fair market value greater than $5,000.
- **Mid-Year/End-of-Year Performance Progress Report (PPR)** is an instrument that SOS funded providers fill out twice annually to report on accomplishments, challenges, and impact stories. This instrument is fielded after Quarter 2 and Quarter 4.

NOTE: The Non-GPRA Tool is no longer fielded. There is no replacement.

Which reports does my organization need to do?

My organization is directly funded by the Ohio Department of Behavioral Health (DBH):

All organizations that are directly funded by DBH MUST do the following reporting:

- SOR/TOR is required for all directly funded organizations.
    - If a question on the SOR/TOR report is asking about an activity that your organization does not do, you will put ZERO and select "check if here if this information is unavailable". You will then indicate why this information is unavailable.
    - If your organization funds multiple sub-awardees such as a local board, you will compile all of your sub-awardee data to report in one submission.
    - More directions on the SOR/TOR can be found in "Report Operations."
- SOR/TOR Sub-Recipient Report is required for all directly funded organizations.
    - If you have sub-awardees, have them send you their SOR/TOR Sub-Recipient Report. You will fill out the TPPR for the organizations and submit on their behalf.
    - More directions on the SOR/TOR can be found in "Report Operations" below.
- The TPPR is required for all directly funded organizations.
    - The TPPR must be filled out by all direct awardees as part of a closeout to account for tangible personal property for SOS 3.0 (all three grant years, even if reported before) and for SOS 4.0 (Year 1).
        - If you have no items to report, you do not need to submit a TPPR. You will instead select "No" on the introduction page for the question "Are you going to be reporting on the Tangible Personal Property Report (PPR)."

        - If you have sub-awardees, have them send you their TPPR information. You will fill out the TPPR for the organizations and submit on their behalf.
    - Each organization submits one TPPR per purchased item.
    - If you have questions, please contact your Ohio Department of Behavioral Health project lead.
    - More directions on the TPPR can be found in "Report Operations" below.
- Performance Progress Report is required for all directly funded organizations.
    - The mid-year and end-of-year progress report **must be filled out by all direct awardees** with Q2 and Q4 reporting.
    - If your organization funds multiple sub-awardees such as a local board, you will compile all of your sub-awardee responses to report in one submission.
    - More directions on the PPR can be found in "Report Operations."

My organization is funded by a local board or another entity that is not DBH:

- If your organization is funded by a local board or another entity that is not DBH, you will report your data to them, and they will submit the report on your behalf. You will not directly fill out the REDCap reporting instruments. Your local board will provide you with PDFs or DOCX of each of the required reports, and you will fill those out with the data for your organization. Reach out to your project lead from the board for further instructions.

My organization is directly funded and was awarded supplemental funding from DBH

- If your organization is directly funded and was awarded supplemental funding from DBH, you will need to submit a separate SOR/TOR and PPR for both types of awards.

Report Operations

The report is distributed by the SOS evaluation team from the Ohio Colleges of Medicine Government Resource Center (GRC). The report is hosted in REDCap and the link will be distributed quarterly by the GRC through SOSEval@osumc.edu. **NOTE: For reporting in REDCap, the user cannot save their progress and complete at a later day. If you exit the REDCap page without submitting your report, you will lose the information you have entered.** We recommend completing all reports on paper first and then copying the responses over into REDCap when ready.

The report's instruments proceed in the following order:

Introduction

Sections of the Introduction page are outlined below.

- Select your organization's name from the drop-down menu.
    - If your organization is not included on this list, please select "other, not listed". This option is listed last in the drop down.
    - After A text box will appear, and you will be prompted to type your organization's name. Please spell out the full name of your organization and do not use acronyms.
- Enter the full address for your organization.

- Select the behavioral health catchment area that your organization is located within (i.e., Northwest, Northcoast, Heartland, Central Ohio, Summit, or Appalachian). There is a map for reference for each county and region.
- Type in your name.
- Type agency-affiliated email address.
- Select which grant you are reporting on, for example SOS 4.0 or SOS 4.0 Supplemental Funding. This will impact the type of instruments you will be prompted to complete.
- Select the reporting instruments you will be completing for your organization for the current quarter. You will select yes for the instruments that you need to complete. SOS 4.0 Year 2 direct awardees can confirm the instruments they need to complete with the SOS 4.0 Year 2 Reporting Responsibilities PDF (for questions about the reporting responsibility PDF, please see the Frequently Asked Questions section).
    - The SOR/TOR, TPPR, and PPR instruments should only be completed by organizations that are directly funded by DBH or those that are funded by Bureau projects. If you receive funding from another organization such as a local board, **DO NOT fill out these instruments**. You will report the corresponding data to the board that funds your work, and they will submit this data on behalf of your organization.
    - If you select "I don't know", the report will not let you proceed until you determine with certainty what reports your organization needs to complete.
- Press "submit" to proceed to the next page to the survey queue.

Survey Queue Landing Page:

After clicking submit for the Introduction page, you will be taken to a landing page that has a survey queue. The queue is a list of the reporting instruments that you indicated your organization needs to report on for this quarter.

- Select "Begin Survey" for each of the reporting instruments. Proceed through them using the directions below. When you are done press "submit."
    - After pressing submit, the survey will bring you back to the survey queue.
        - **If you would like to save a PDF of each of your submissions, you must do so after completing each one.** You will press "submit" and then return to the survey queue landing page. There are two options for downloading your submissions:
        - There will be a section that says "Download your survey response (PDF)" which will automatically generate a PDF of your submission in your downloads folder.
        - There will be a section that allows you to enter your email address with a button that says "Send Confirmation Email". When you press that button, you will receive confirmation that you submitted the reporting instrument and receive a PDF copy in the email.
    - Proceed through **ALL** of the reporting instruments that are in your queue. **Reminder: The user cannot save their progress and complete at a later day. If you exit the REDCap page without completing each of the selected reports, the reports left undone will appear as incomplete and you will not be able to re-enter the same submission at a later day.**

- Once you have filled out each reporting instrument, you will see "Completed" with a green check mark under the status column. When you have done this for all of the reporting instruments you need to report on, you can press "close survey."

SOR/TOR:

- Fill out the SOR/TOR data for your organization:
  - Please answer all questions using only numerical digits. You must enter a zero if there is no value to report or the activity is not applicable.
  - Only report information and data for programs and activities funded wholly or in party by the SOS grant funding.
  - If you have sub-awardees, combine all the data and submit together once.
- SOR/TOR Sub-Recipient Expenditure Report:
  - The SOR/TOR report now has a sub-recipient expenditure section that is fielded once annually in Quarter 2. The intent of this section is for awardees to report the expenditure amounts and types of services provided by the SOR/TOR during **the previous fiscal year**. For more information, please see page 10 of the CSAT SOR/TOR instrument.
    - Please note, for the Sub-Recipient Report, the "state" is DBH and the "sub recipient" is your organization.
  - If you have multiple expenditures to report, press "Report on Additional Sub-Recipient". When you are done press "submit".
  - This report will ONLY appear during quarter 2 and will otherwise be disabled during Q1, Q3, and Q4.

Tangible Personal Property Report

- Fill out the TPPR data for your organization
  - If you have multiple TPPRs to report, select "do you have another item to report." When you are done, press "submit."
  - If you have sub-awardees, have them send you their TPPR information. You will fill out the TPPR for the organizations and submit on their behalf.
  - This report is fielded annually during the Q1 distribution.
  - If you have questions, please contact your Ohio Department of Behavioral Health project lead.

Mid-Year/End-of-Year Performance Progress Report:

- Fill out the PPR for your organization:
  - This report is fielded twice annually, during the Q2 and Q4 distributions.
  - If you have sub-awardees, combine all the data and submit together once.
- Press submit. See further directions above in "Survey queue landing page".

Frequently Asked Questions

Who conducts the SOS Quarterly Report and how will we receive it?

The report is conducted by the GRC and hosted in REDCap. Each quarter, a new link will be distributed through the SOSEval@osumc.edu email address. Do not attempt to access the link from a previous quarter's link.

GRC will send an email one week prior to sending the link for the report to let the field know that the link for the report will be coming. The report link will then be sent and open for 4 weeks. Two reminder emails will be sent during the 4-week window.

How does the report work?

All the reporting instruments are housed in the REDCap survey link that you receive from GRC each quarter via email. When you click the link, you will begin on an introductory page and select your organization. You will then select the grant type you are reporting on and this will auto-populate the reporting instruments for selection for that particular quarter: Q1) SOR/TOR and TPPR; Q2) SOR/TOR, SOR/TOR Sub-Recipient Report, and Mid-Year Performance Progress Report; Q3) SOR/TOR; Q4) SOR/TOR and End-of-Year Progress Report.

My organization is not listed on the SOS 4.0 Year 2 Reporting Responsibilities (PDF), does this mean I have no reporting responsibilities?

No. The SOS 4.0 Year 2 Reporting Responsibilities (PDF) is updated regularly and does not include sub-awardees (only those directly funded by DBH). If you do not see your organization's name on the list, please email sos4@dbh.ohio.gov and CC SOSEval@osumc.edu to confirm your reporting responsibilities.

My organization was awarded supplemental funding from DBH for SOS 4.0 Year 2; do I need to submit reports for this additional funding?

Yes. If your organization was awarded supplemental funding from DBH, you will need to submit a separate SOR/TOR and PPR. The REDCap introductory page has the option to select that you are reporting for SOS 4.0 Supplemental Funding. You will select "yes" for the SOR/TOR and PPR.

My organization is directly funded and was awarded supplemental funding from DBH; do I need to submit two separate reports for each award type?

Yes. If your organization is directly funded and was awarded supplemental funding from DBH, you will need to submit a separate SOR/TOR and PPR for both types of awards.

My organization does not complete SUPRT Assessments, do I still need to complete the Quarterly Reporting?

Yes. If you have direct funding from DBH for SOS, you need to complete the SOR/TOR and PPR (Mid-Year and End-of-Year). See more specific scenarios below:

- If you receive funding from DBH through Bureaus such as Community & Family Resiliency, Recovery Supports, and SUD treatment, you have the responsibility to complete the SOR/TOR and PPR. If you organization is part of one of the above Bureau-funded models

and Community Organization, you can submit a combined report for the SOR/TOR and PPR. However, you need to need to be specific in the PPR to report for each separate program.

- If your organization is a part of MOMs, a specific evidence-based model, you have the responsibility to complete the SOR/TOR and PPR specifically for MOMs. If your organization has funding from DBH through Community Organizations and MOMs you can submit a combined report for the SOR/TOR and PPR. However, you need to need to be specific in the PPR to report for each separate program.

For the PPR, how do I complete the Aggregated Total of Clients Served by Age?

This is the total unduplicated number of SOS participants served by SOS during the reporting period. This number includes all SOS-funded activities. If you do not know the ages of the clients, the count can be added in the unknown category.

For the PPR, how do I complete the Activities & Output section and what is meant by Materials Distributed (quantity), Coalition Sectors Engaged, Event/Occurrences Held, and Policy Environmental Strategy Progress?

During Q2 of Federal Fiscal Year 2026, a two-part question was added to the PPR to capture additional reporting information: Activities and Outputs (check all the apply) and the corresponding information for the activities and outputs selected - Materials Distributed (quantity), Coalition Sectors Engaged, Event/Occurrences Held, and Policy Environmental Strategy Progress

- Activities and Outputs: Select all activities and outputs completed using SOS funding during the reporting period.
- Corresponding information: This section is in reference to “Activities & Outputs”.
- The “Events/Occurrences Held”, along with the other items in the list (Materials distributed, Coalition Sectors Engaged, and Policy/Environmental Strategy Progress) is in reference to the “Activities & Outputs” section. For example, if “Training/Workshop” and “Coalition Meeting/Action” were the two items selected in Activities & Outputs, then events and occurrences should reflect the count of all events for those items selected.

As an organization with sub-awardees, how am I supposed to fill out the report?

For the SOR/TOR, SOR/TOR Sub-Recipient Report, TPPR, and Mid-Year and End-of-Year Performance Progress Report, please collect all the responses from your sub-awardees and compile them together to submit at one time. The GRC will send blank PDFs/DOCXs of each program instrument that you can send to your sub-awardees to fill out and report back to you. Do not submit the instrument more than one time.

I don’t have anything to report on the SOR/TOR or PPR, do I still need to submit?

Yes, you still need to complete these reports if you receive direct funding from DBH.

Can I receive my response when I am done submitting?

Yes. Upon successful completion of each survey instrument, you can download a PDF from the survey queue landing page. See further instructions in “Report Operations”.

If you have any other questions, please reach out to our team at SOSEval@osumc.edu