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PATH Grant Application Manual for State Users

Substance Abuse and Mental Health Services Administration

Web-based Block Grant Application System

PATH Grant Application Manual for State Users

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Contents

Introduction 1
1. Accessing WebBGAS 2
2. State Profile 6
3. Creating a New PATH Application 9
4. Application Overview 12
5. Viewing/Editing an Existing Application 15
6. PATH Reported Activities 30
7. IUP User Management 31
8. State Review of IUP Applications 36
9. Application Attachments 38
10. Handling Sub-IUPs (when applicable) 40
11. Completing & Reviewing the PATH Application and Submitting to SAMHSA 41
12. Handling Revision Requests from SAMHSA 45
13. Standard Reports 50
14. Getting Help within the WebBGAS System 53

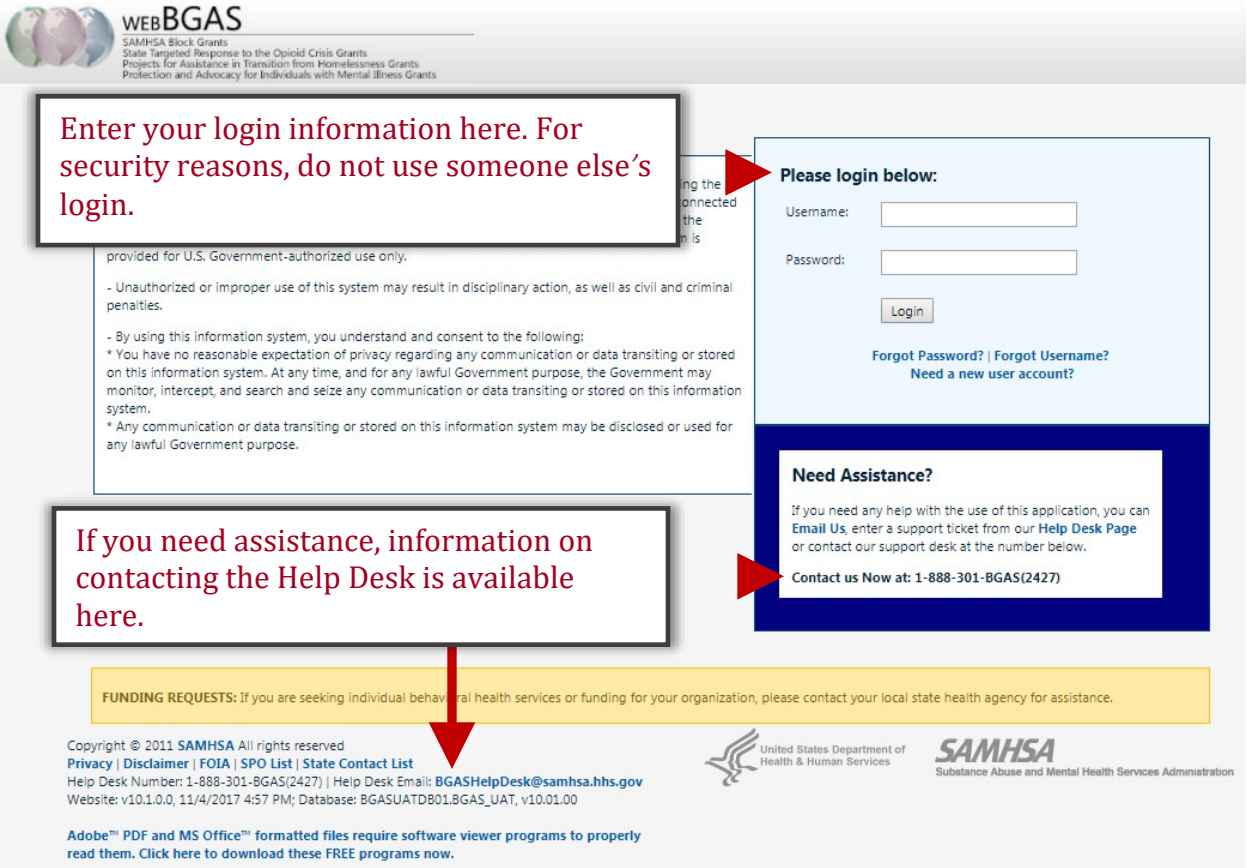
Introduction

This *Projects for Assistance in Transition from Homelessness (PATH) Grants Application Manual for State Users* is a reference document designed to help PATH State users navigate the Web-based Block Grant Application System (WebBGAS). The WebBGAS platform includes many functions for states and territories as it is primarily designed for capturing state Block Grant data and creating a set of useful reports using that data.

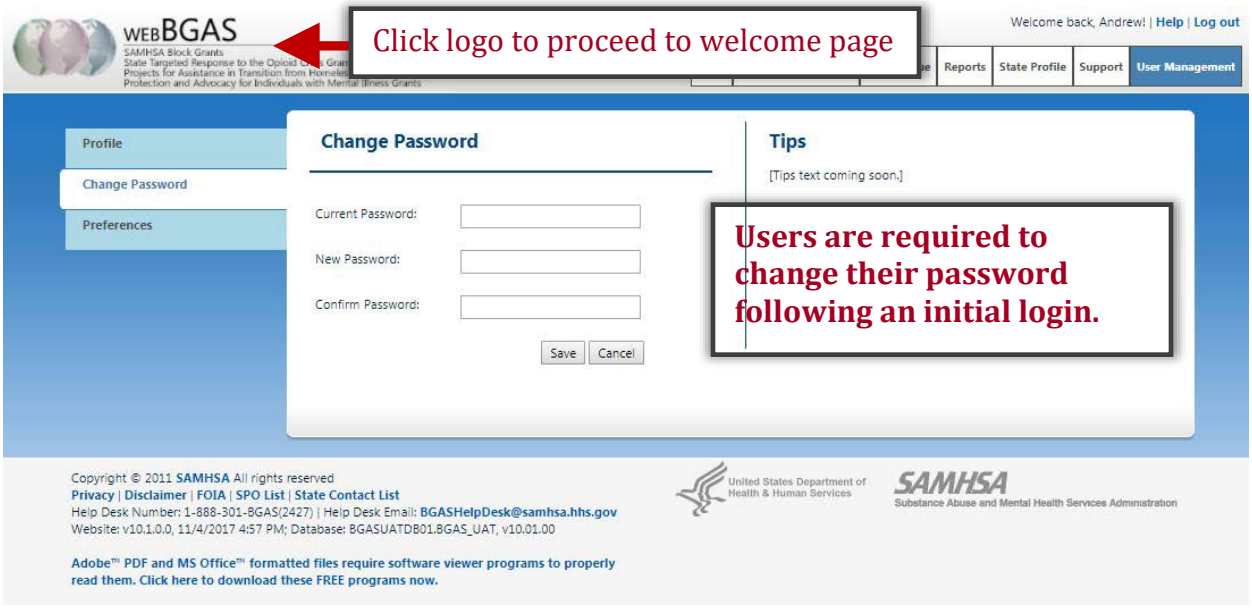
As you may know, PATH grantees use WebBGAS to create, document, revise, and complete their PATH Grant Applications. This manual is organized into sections based on key system functions, and it provides a step-by-step guide for using these functions. Screenshots from the website are included to facilitate your understanding of the reporting process. Important areas are highlighted, and helpful tips are included throughout the manual. If you have any questions or issues not covered in this system navigation manual, please contact the WebBGAS Help Desk at BGASHelpDesk@samhsa.hhs.gov or (888) 301-2427.

1. Accessing WebBGAS

Each time you access WebBGAS (Link to website: https://bgas.samhsa.gov), you need to log in with your username and password as shown below.



Following your **initial login**, you will be automatically directed to the web page shown below. WebBGAS requires that you change your temporary password to a more secure password of your choosing. (Guidance for selecting a more secure login password is provided below.) To do this, you must enter your temporary password in the box labeled "Current Password" followed by a password of your choosing in the boxes labeled "New Password" and "Confirm Password" as shown below.



IMPORTANT REMINDER:

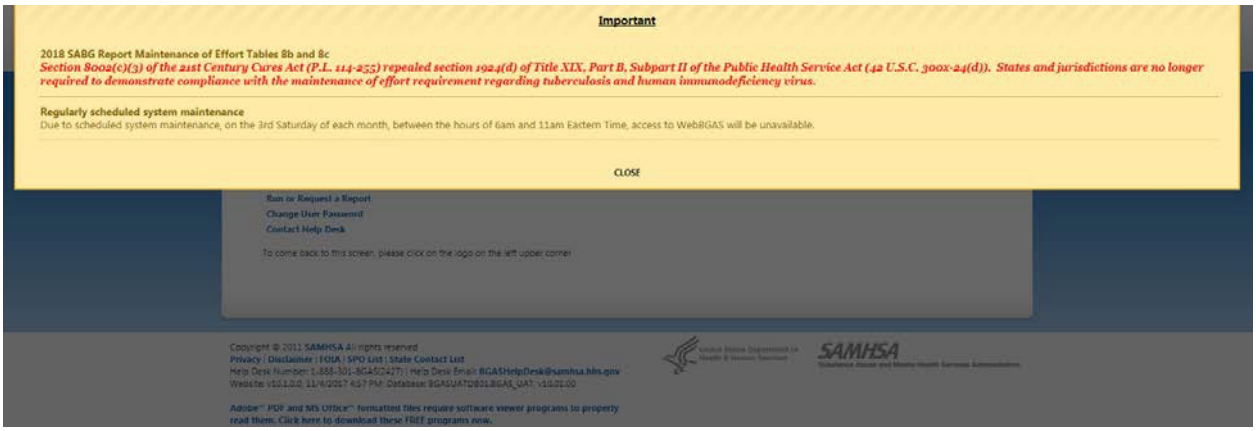
HHS Security policy dictates that you **DO NOT** share your login credentials, nor use anyone else's to access WebBGAS.

Your new password must be at least 8 characters in length and must contain at least three of the following four requirements:

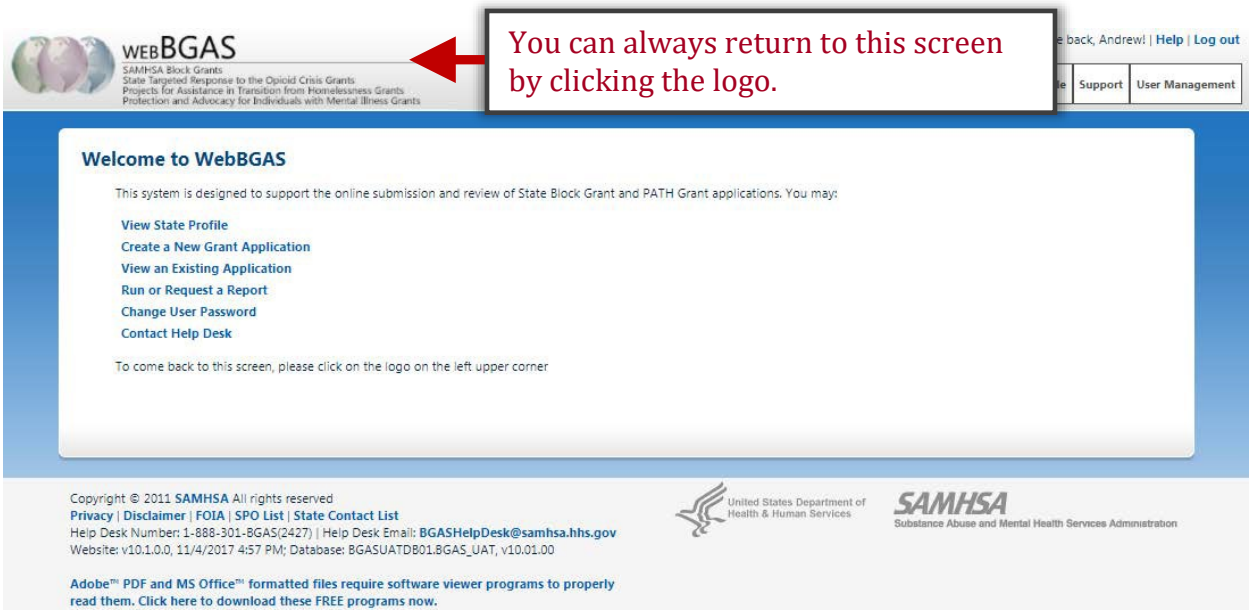
- An upper-case letter
- A lower-case letter
- A number
- A special character (e.g., #, @, $, &)

You may not reuse your three most recent passwords. Once you enter your new password, click the **Save** button. If your password is valid and meets the requirements, the system will acknowledge that your password has been changed.

Following this acknowledgement, click on the WebBGAS logo in the upper left corner. By clicking this logo, you will be directed to the system's Welcome Page where you can access WebBGAS and begin your PATH Grant Application process.



After logging-in and navigating to the home page, there will be a window shade that will display pertinent issues and maintenance plans. You can click anywhere on the window shade to make it disappear. The following screenshot shows the Welcome page.



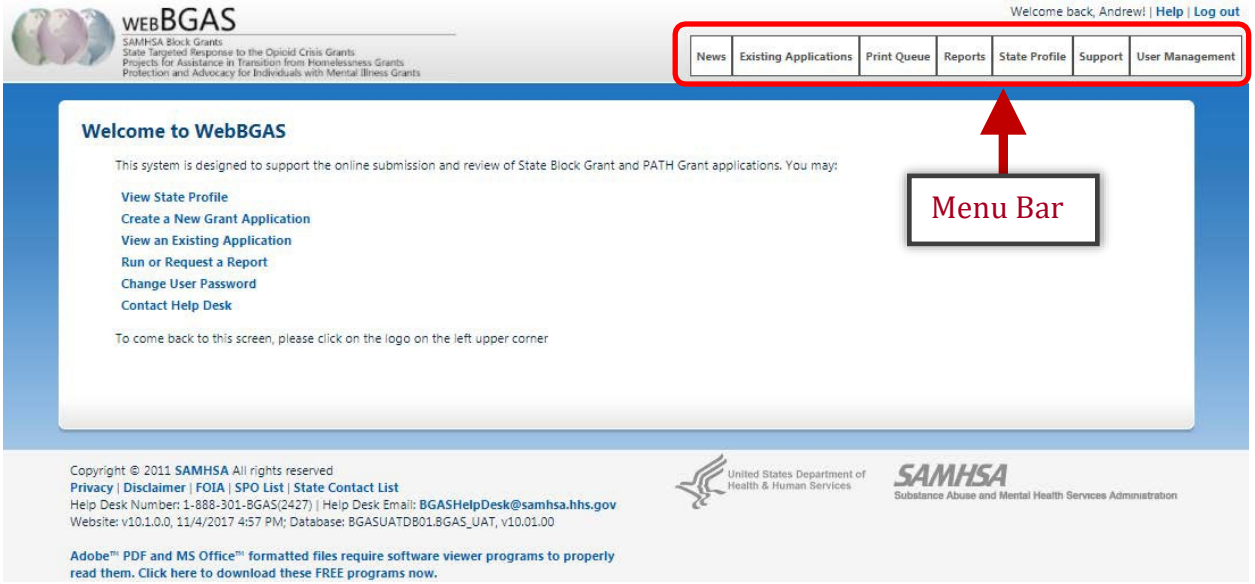
HELPFUL TIP:

You can navigate back to the Welcome page at any time by clicking the WebBGAS logo in the upper left corner of your screen.

From the Welcome Page, you can:

- View the State Profile page;

- Create your PATH Grant Application;
- View an existing PATH Grant Application;
- Run a Standard Report;
- Change your user password; and
- Contact the Help Desk.



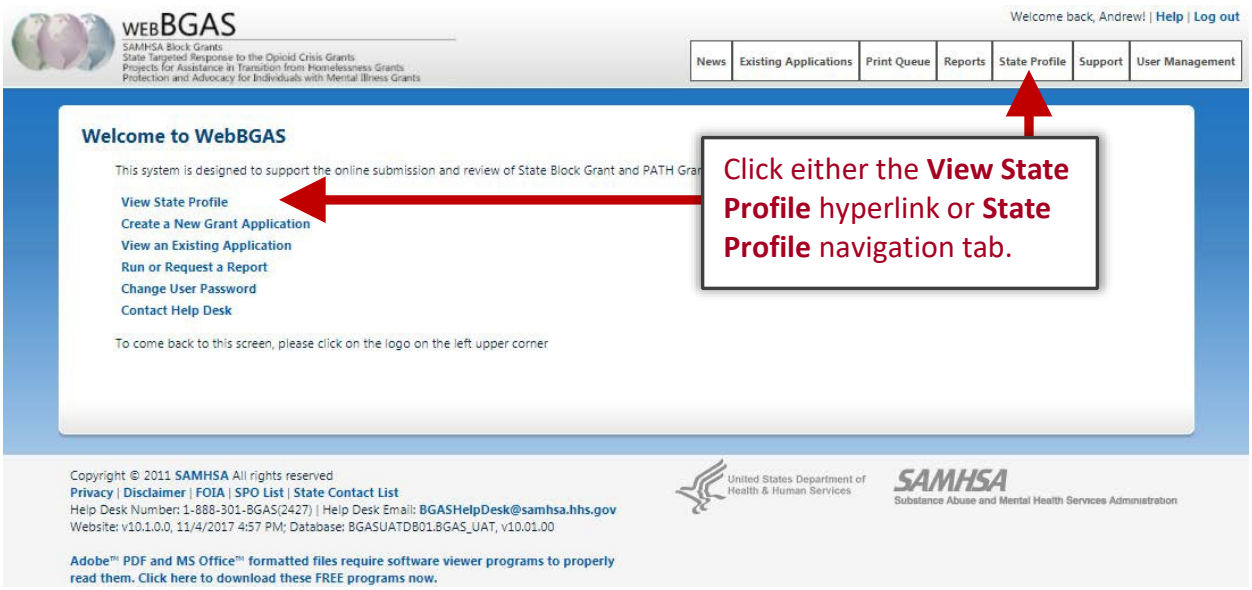
A key feature of WebBGAS which first appears on the Welcome page is the **menu bar**. This menu bar helps you navigate WebBGAS, and it remains visible on every page no matter where you are in the system. At any point during your PATH Grant Application process, the menu bar allows you to:

- View news or updates [News];
- View existing reports or view the timeframe of your PATH Grant Application submission [Existing Applications];
- Check the status of printed documents [Print Queue];
- Run Standard Reports [Reports] in the future;
- View State Contact List [State Profile];
- Request support through the Help Desk or access online training materials [Support]; and
- Change your user settings such as password or email address [User Management].

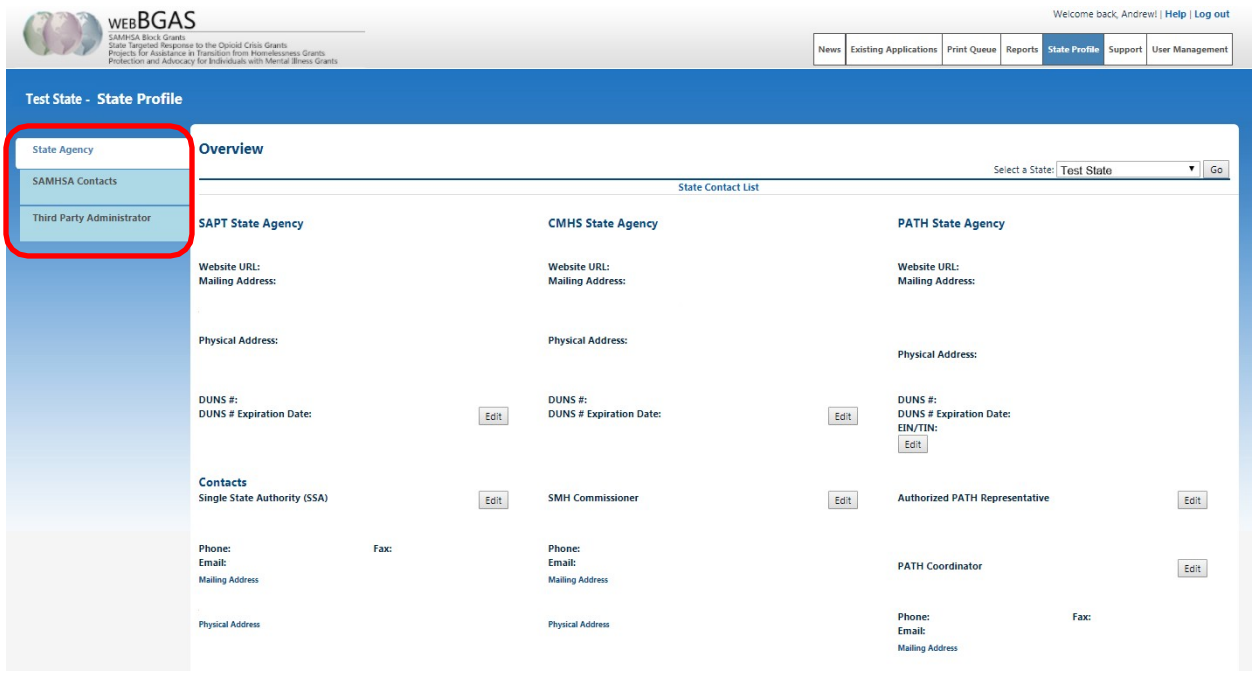
We present key features in more detail in subsequent sections of this manual.

2. State Profile

To access the State Profile page, click **View State Profile** on the Welcome page or click the **State Profile** tab on the menu bar in the upper right corner of the screen.



The State Profile Page consists of two parts: (1) The State Agency page and (2) the SAMHSA Contacts page. To access these pages, use the links in the left navigation pane as shown below.



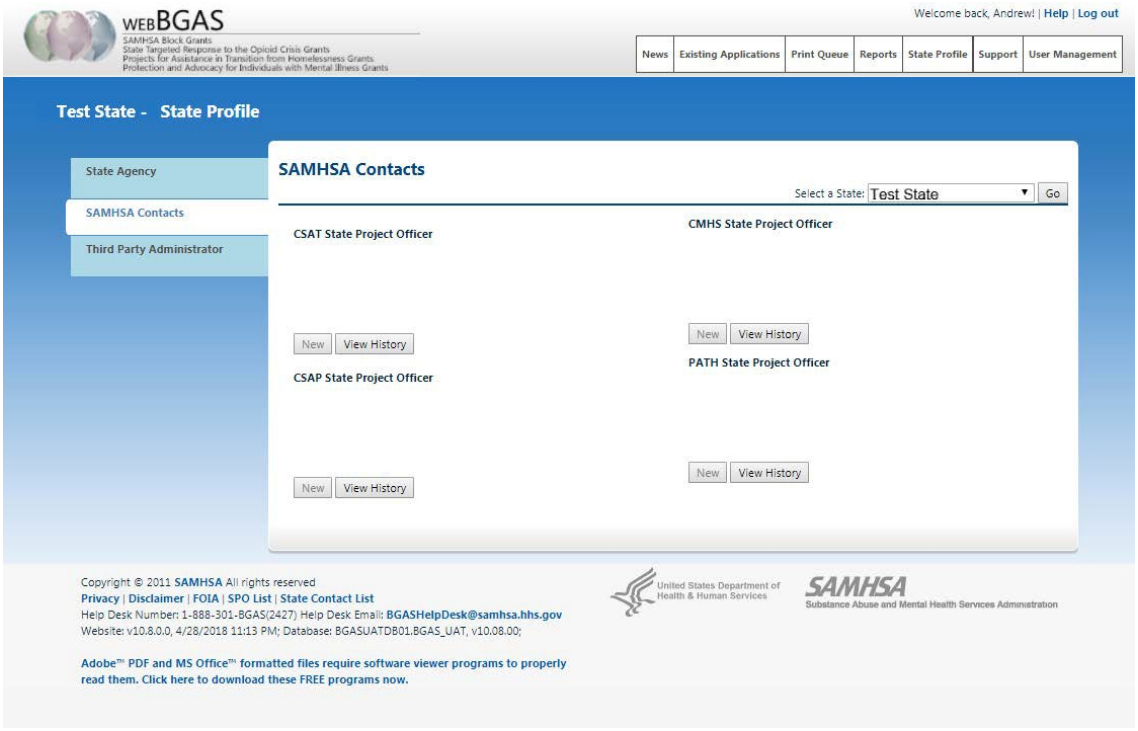
The State Agency page contains…

- Addresses and DUNS numbers for the agencies receiving block grant funding.
- Contact information for key personnel affiliated with the State's/Jurisdiction's block grants.

This information can be edited by authorized users – including both State Supervisors and regular State users – by clicking the "Edit" buttons as shown below.

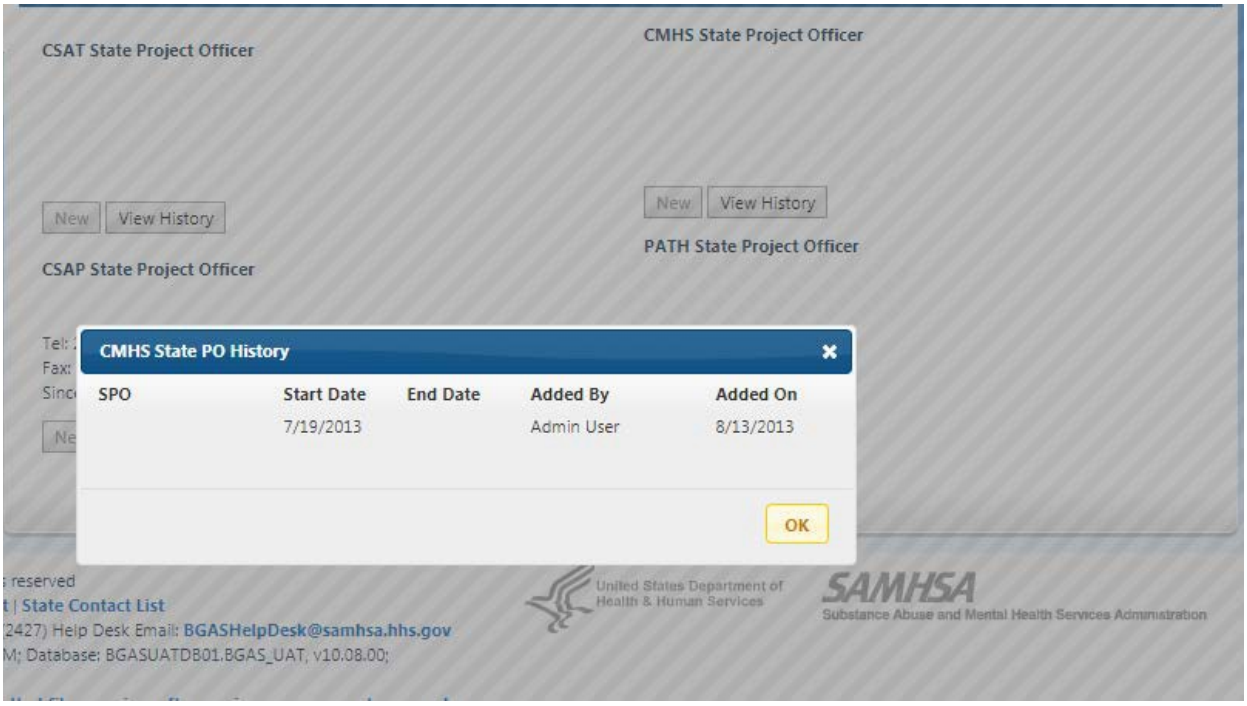
> ***HELPFUL TIP:***
>
> The information in each State Profile is used to auto-populate information throughout other areas of the PATH Grant Application. Review your State Profile regularly to make certain the information is up-to-date.

The SAMHSA Contacts page contains…



- Contact information for the current CSAT, CSAP, CMHS, and PATH project officers for the State/Jurisdiction.
- Names of previous project officers for the State/Jurisdiction.

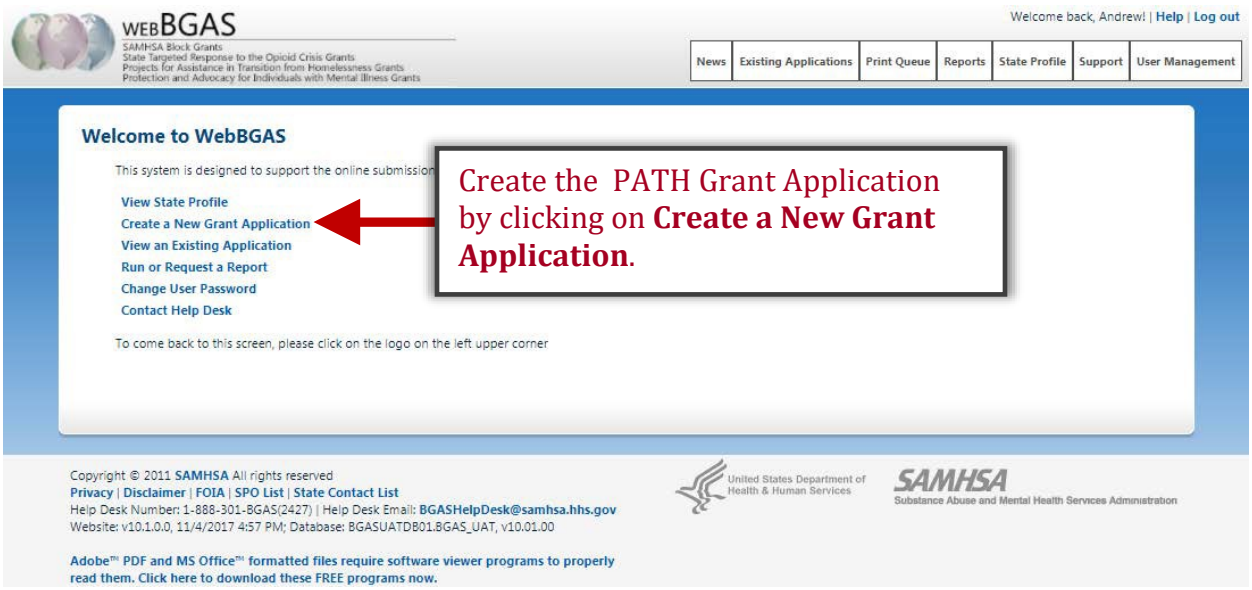
Once logged in to WebBGAS, all users, including citizen users, can view the information on the SAMHSA Contacts page. Only authorized SAMHSA users can add a new State Project Officer.



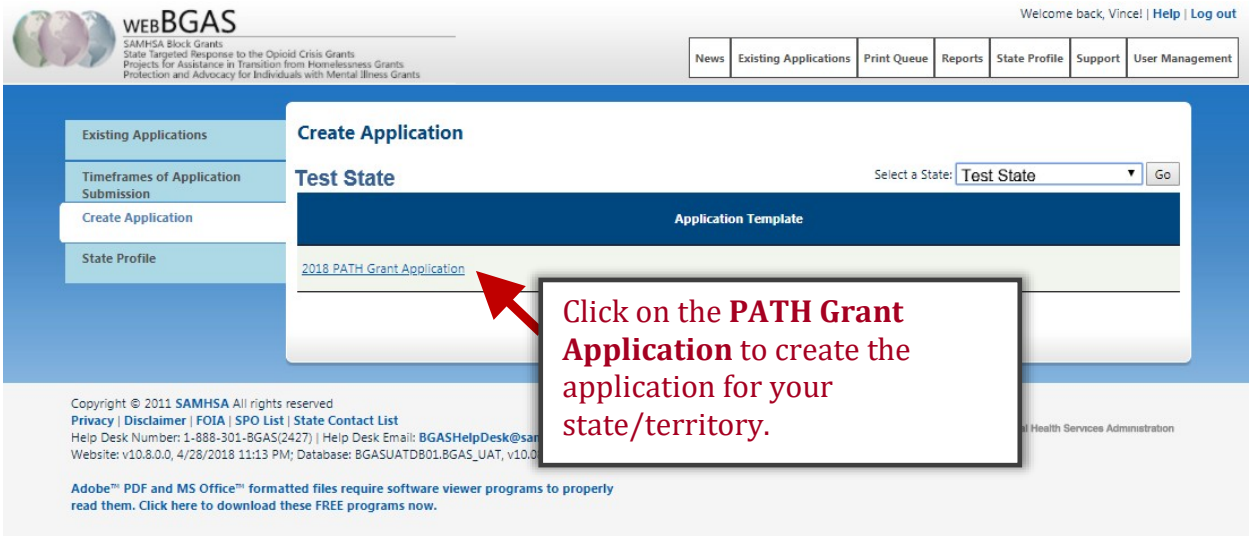
By clicking **View History** a window appears like the one shown below. The "History" window displays the start and end dates for the project officer assignment to this State/Jurisdiction.

3. Creating a New PATH Application

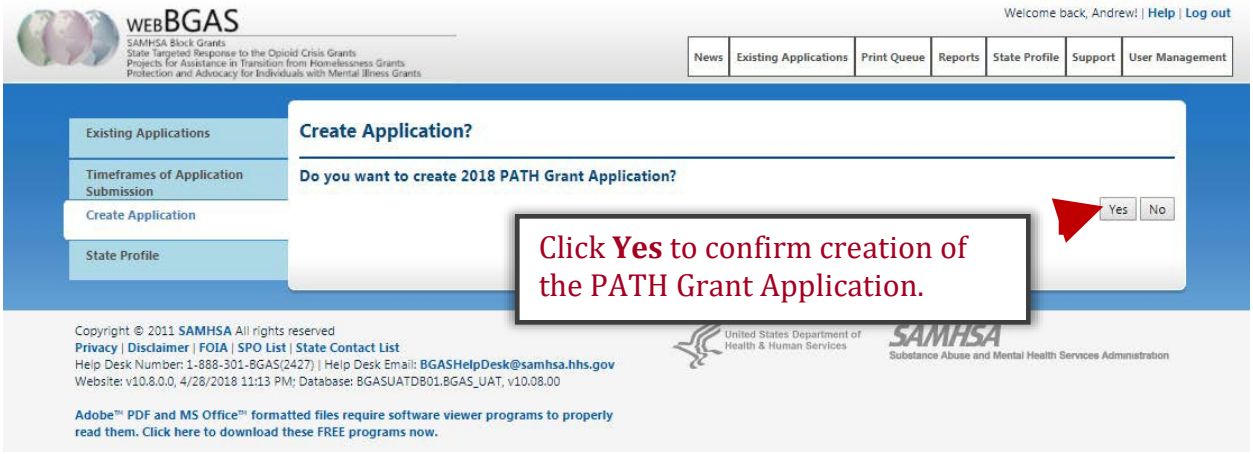
If the PATH Grant Application has not been created, you can create the application by clicking on the **Create a New Grant Application** hyperlink on the Welcome page.



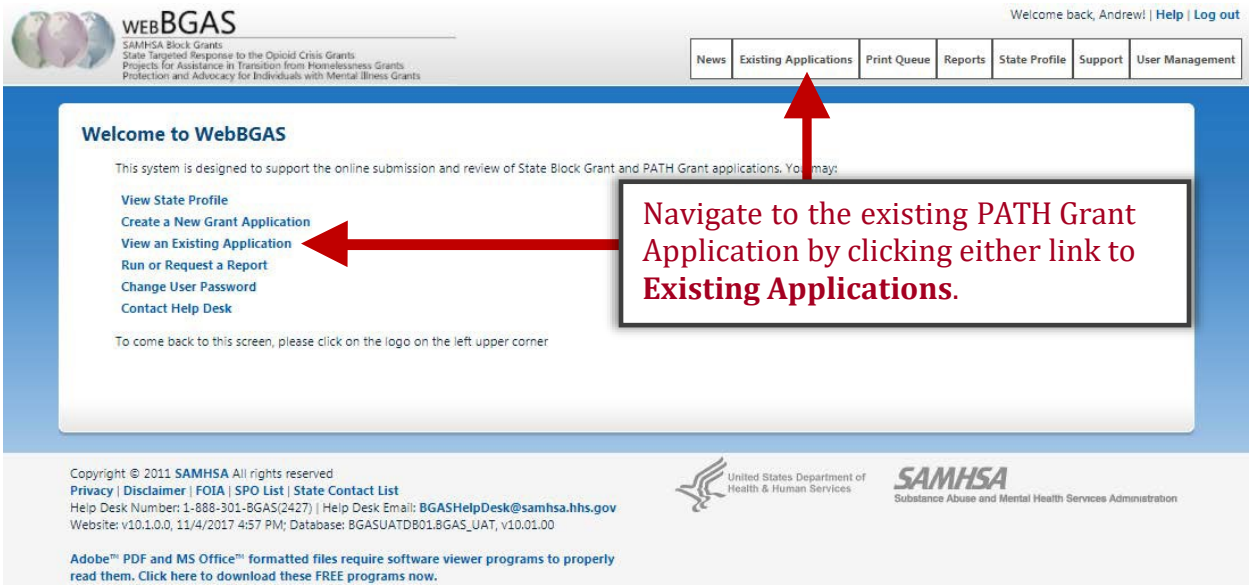
You will be taken to the page displayed by the following screenshot. This page contains a list of all yet-to-be-created applications or reports for your state/territory. Click on the **PATH Grant Application** hyperlink to create this report.



A confirmation page will appear. Clicking **Yes** will confirm the creation of the PATH Grant Application.

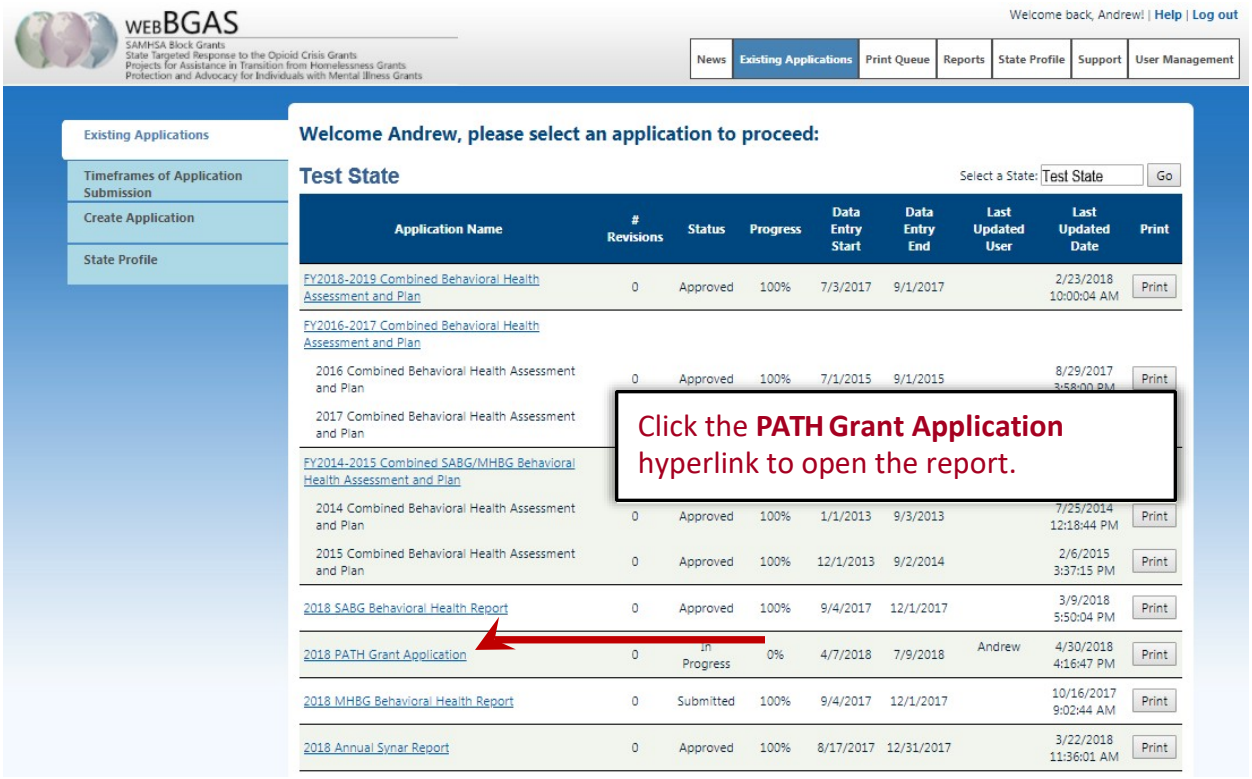


If the PATH Grant Application has been created, you access it by clicking on either the **View an Existing Application** hyperlink on the Welcome page, or by click on the **Existing Applications** button in the upper-right navigation menu.



4. Application Overview

Once the application or report has been created, or once you click either link to the Existing Applications page (shown below). On this page, you can select a report to view by clicking on the appropriate hyperlink. You can also elect to print your report from this page by clicking the **Print** button.

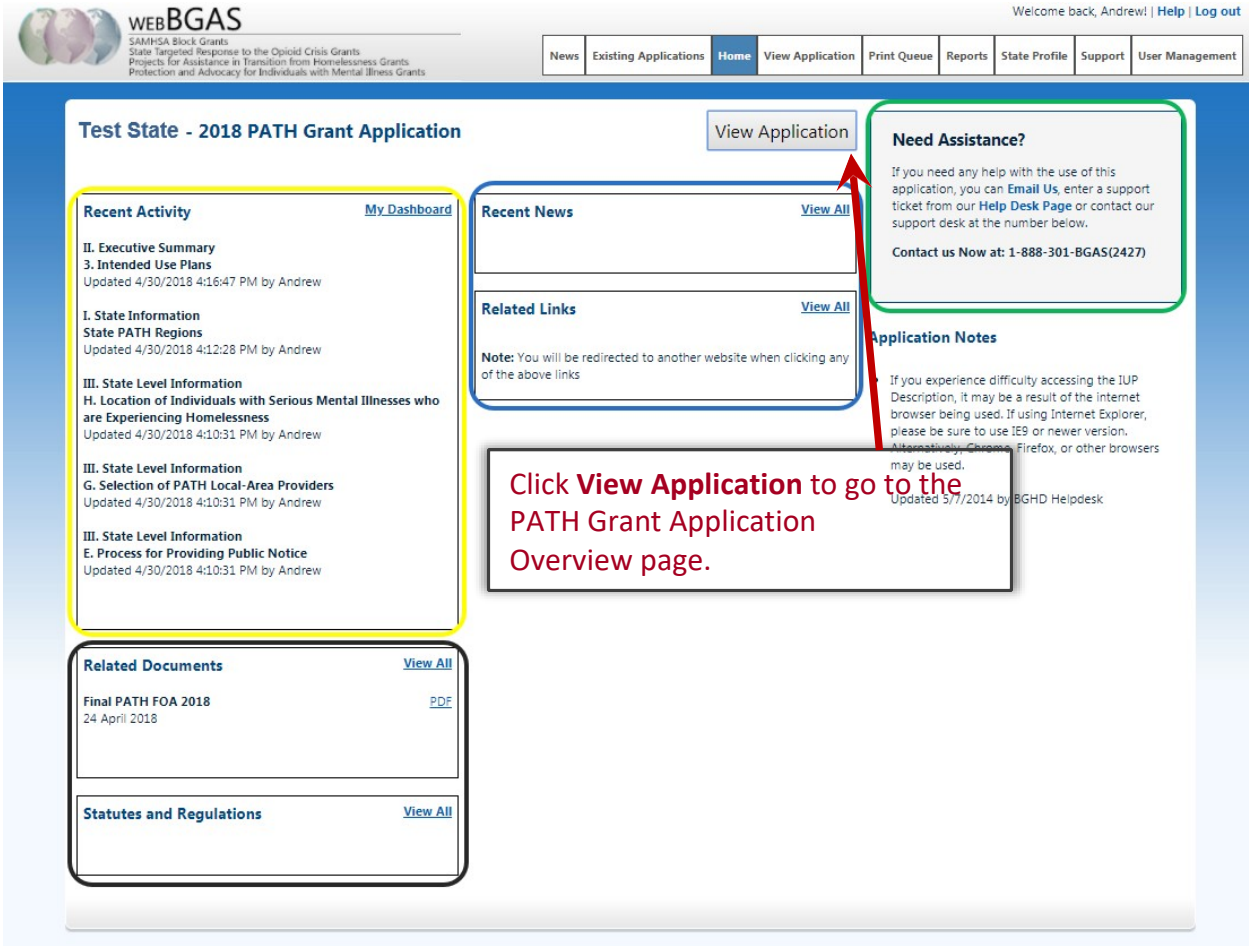


IMPORTANT REMINDER:

For your report to appear on this list, it must first be created by your State Supervisor.

Page (shown below). From the Home Page, you can:

- Check your recent activity for your application (highlighted in yellow);
- View related documents or statutes and regulations (highlighted in black);
- Check notifications, recent news, and related links (highlighted in blue); and
- Seek assistance by contacting the WebBGAS Help Desk (highlighted in green).

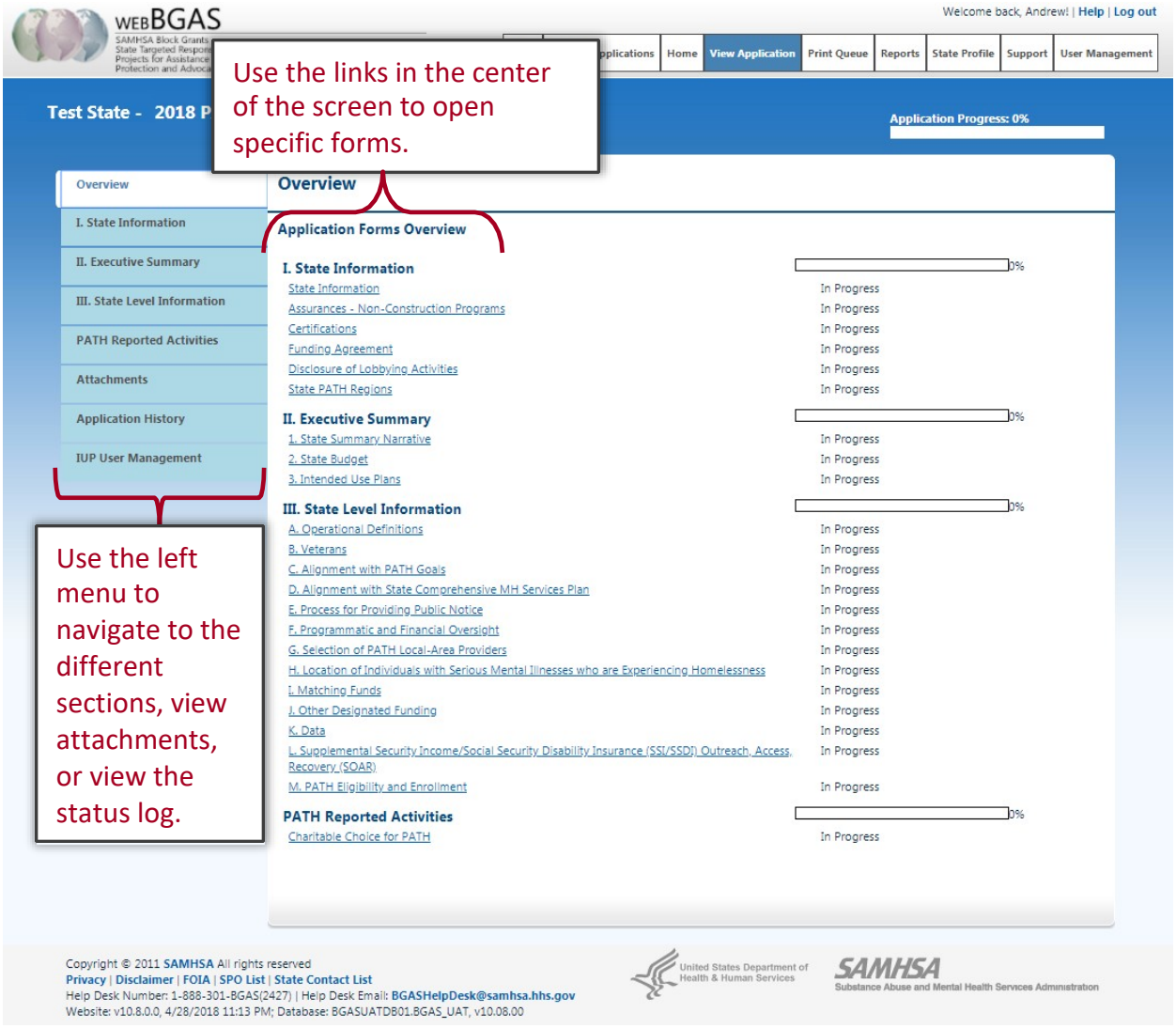


To enter the PATH Grant Application Overview page, click the **View Application** button. If at any point you want to return to the application's Overview page, simply click **Home** on the WebBGAS navigation menu in the upper right corner of the screen.

By clicking **View Application** you will be directed to the Overview page, as shown below. The Overview page provides access to the PATH Grant Application forms and tables as well as the progress status of the report and its separate sections.

There are two ways to open a specific form within your application:

- Click the Section Headings which are in the left navigation pane of the web page.
- Select the desired form using the hyperlinks in the Overview page.

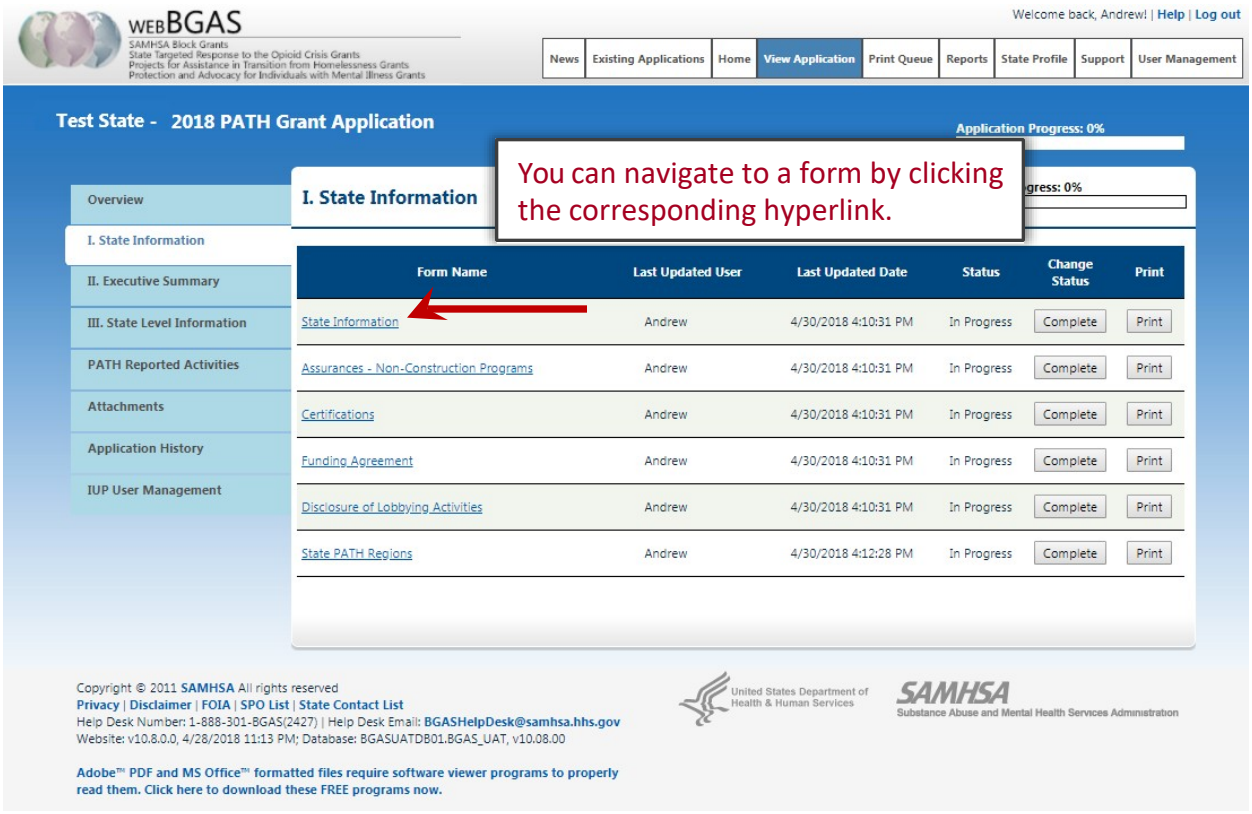


5. Viewing/Editing an Existing Application

State Information Section

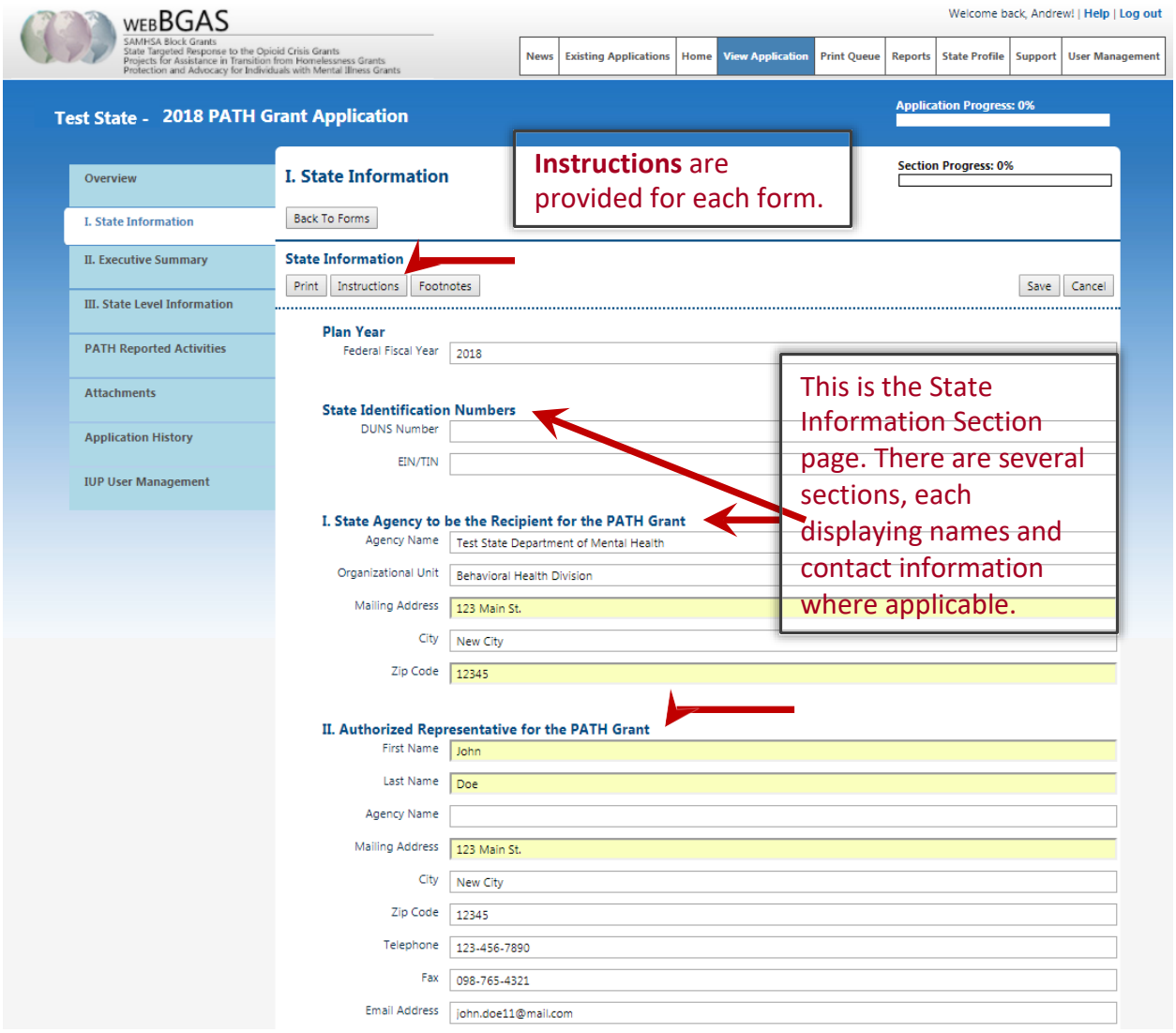
The first section of the PATH Grant Application is the State Information section. This section contains six (6) forms to be completed:

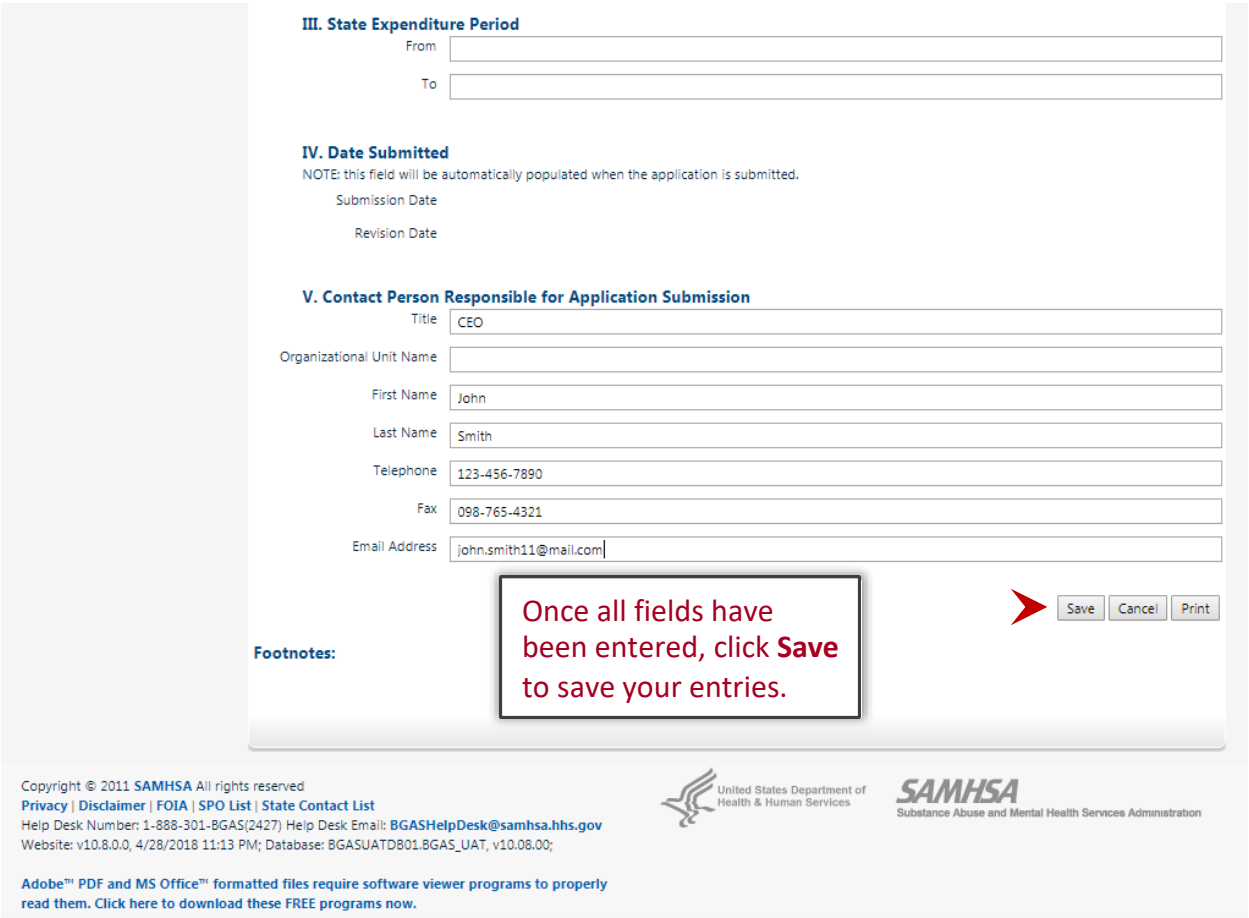
- State Information
- Assurances – Non-Construction Programs
- Certifications
- Funding Agreement
- Disclosure of Lobbying Activities
- State PATH Regions



State Information Form

The following screenshot is the first form of the State Information Section: State Information. The State Information form contains the name of the State Agency being awarded the PATH Grant, the name and contact information for both the Authorized Representative and the responsible person for the submission of the PATH Grant, as well as the expenditure and submission period of the PATH Grant.



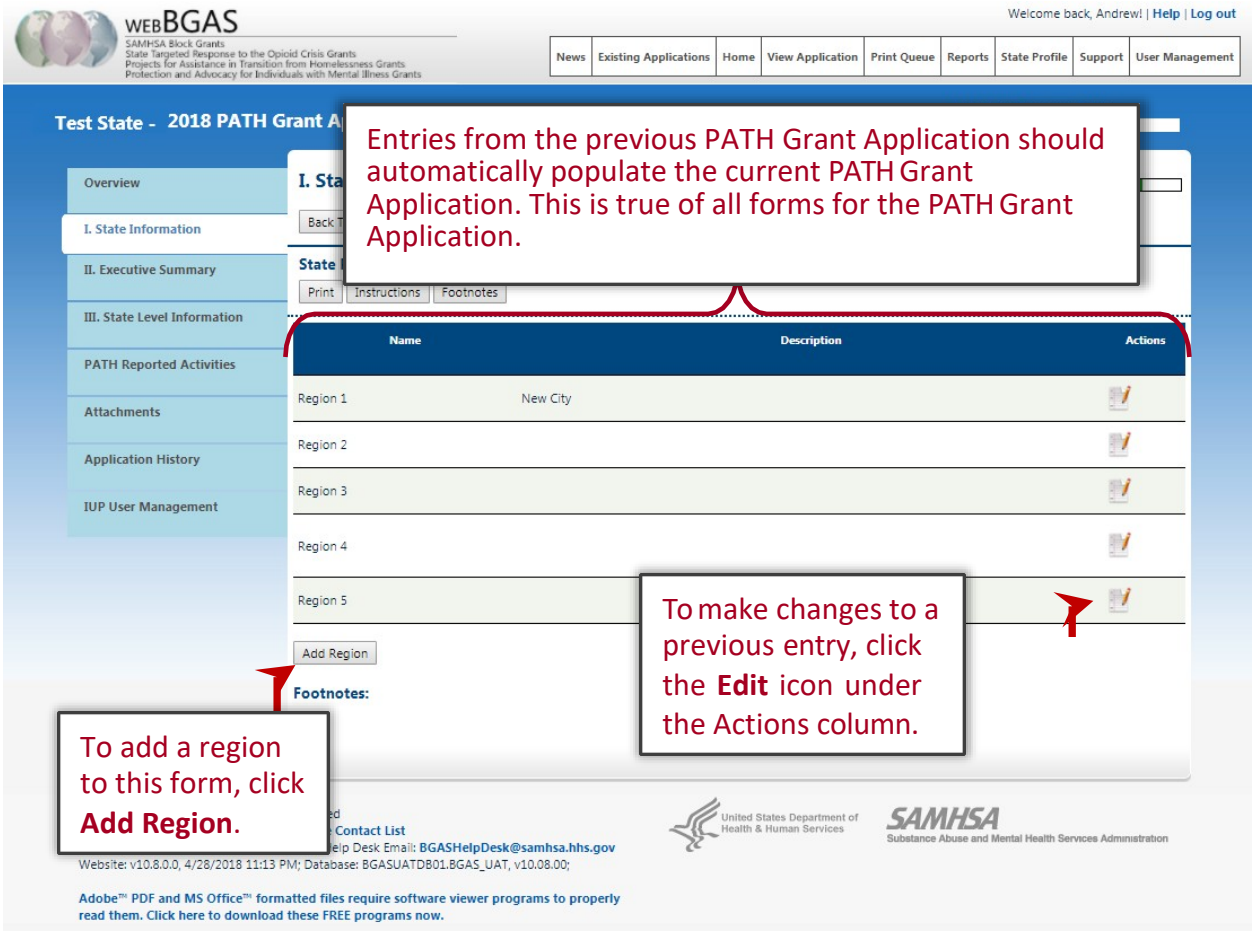


IMPORTANT REMINDER:

Be sure to click on the **Save** button after filling out each section of the application to ensure your entries are saved and progress is not lost.

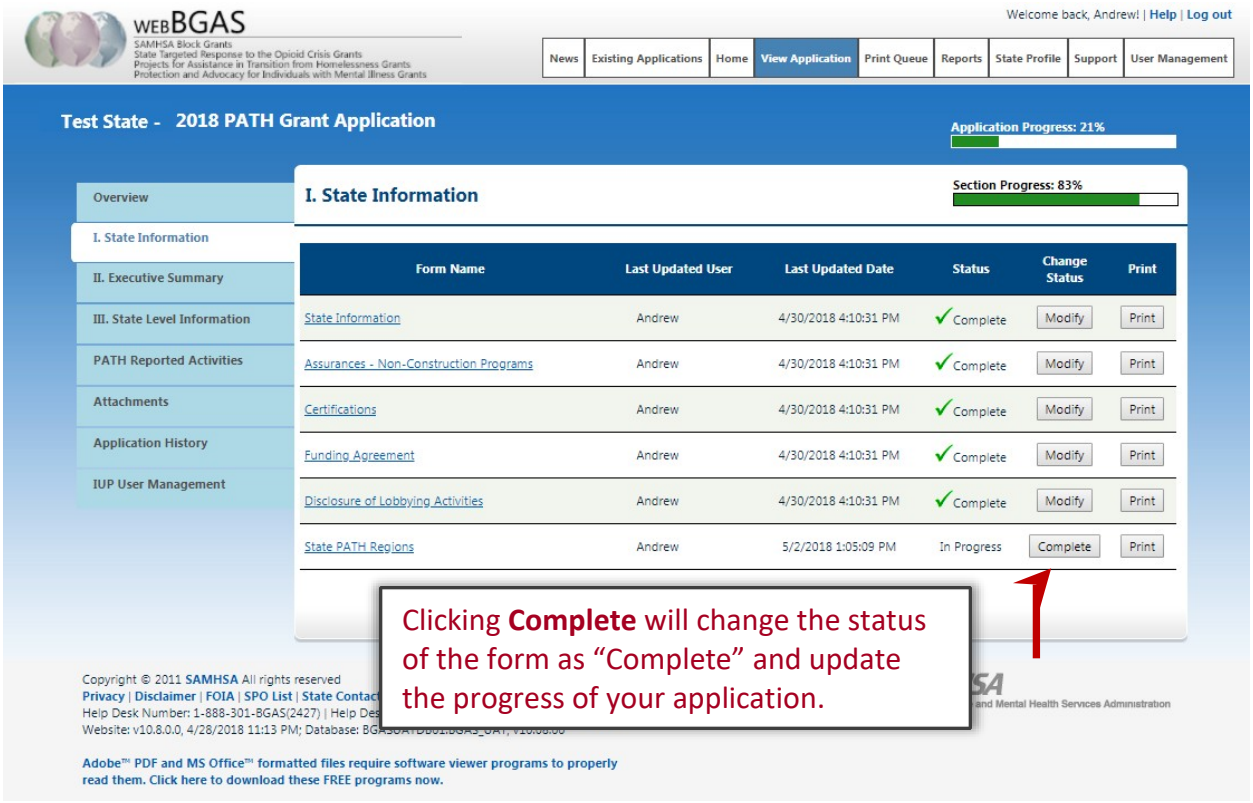
State PATH Regions Form

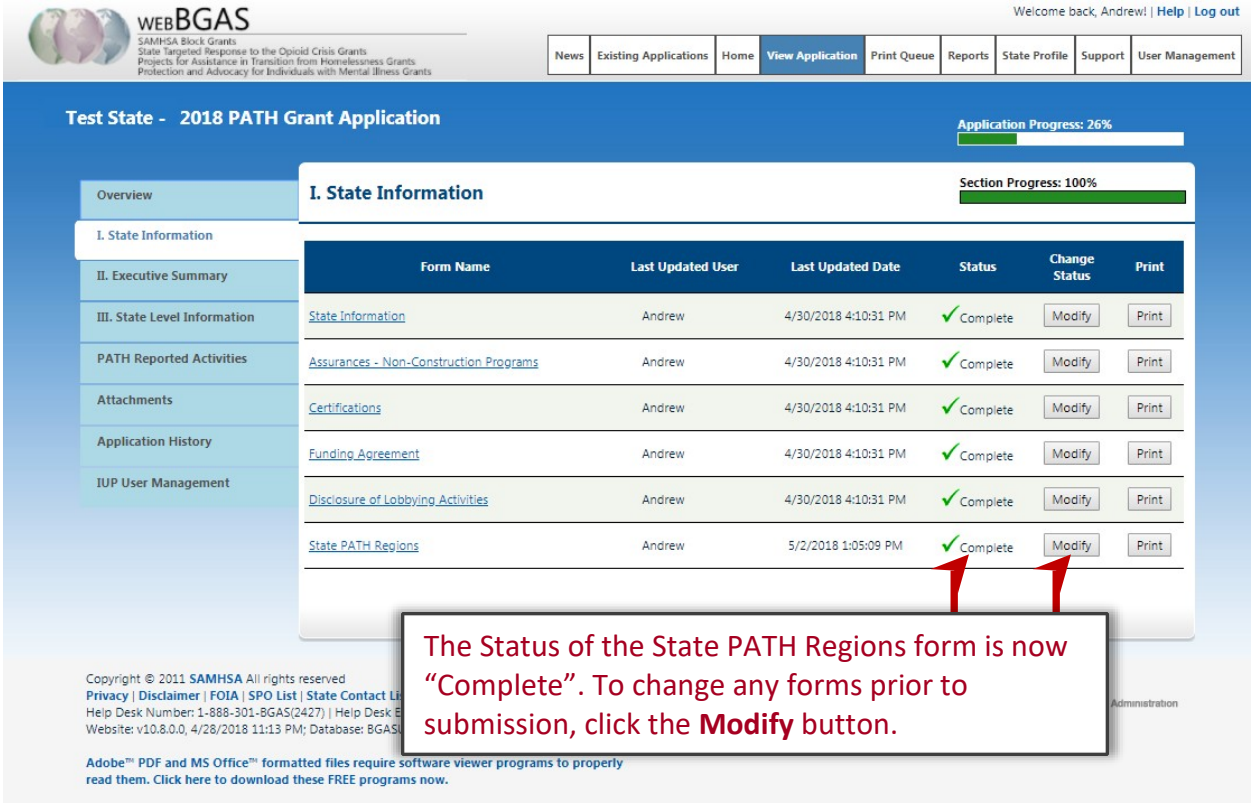
This is the State PATH Regions Form. Your State PATH Regions are pre-populated from the prior year's PATH Grant Application. New regions may be added, and regions not associated with an IUP can be deleted.



To delete a region where the X is not available, you will first need to reassign or delete any IUPs currently associated with that region.

After filling out a form in the PATH Grant Application and clicking the **Save** button, you should change the status of that form from "In Progress" to "Complete". To do this, navigate to the section page – in this case, I. State Information – and find the form you have completed. Click on the **Complete** button under the "Change Status" column for that form and the Status column should change from "In Progress" to "Complete".


WEBBGAS
SAMHSA Block Grants
State Targeted Response to the Opioid Crisis Grants
Projects for Assistance in Transition from Homelessness Grants
Protection and Advocacy for Individuals with Mental Illness Grants
Welcome back, Andrew! | Help | Log out
News
Existing Applications
Home
View Application
Print Queue
Reports
State Profile
Support
User Management
Test State - 2018 PATH Grant Application
Application Progress: 21%
Overview
I. State Information
II. Executive Summary
III. State Level Information
PATH Reported Activities
Attachments
Application History
IUP User Management
I. State Information
Section Progress: 83%
Form Name
Last Updated User
Last Updated Date
Status
Change Status
Print
State Information
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Assurances - Non-Construction Programs
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Certifications
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Funding Agreement
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Disclosure of Lobbying Activities
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
State PATH Regions
Andrew
5/2/2018 1:05:09 PM
In Progress
Complete
Print
Clicking Complete will change the status of the form as "Complete" and update the progress of your application.
Copyright © 2011 SAMHSA All rights reserved
Privacy | Disclaimer | FOIA | SPO List | State Contact
Help Desk Number: 1-888-301-BGAS(2427) | Help Desk
Website: v10.8.0.0, 4/28/2018 11:13 PM; Database:
Adobe™ PDF and MS Office™ formatted files require software viewer programs to properly read them. Click here to download these FREE programs now.


WEBBGAS
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Welcome back, Andrew! | Help | Log out
News
Existing Applications
Home
View Application
Print Queue
Reports
State Profile
Support
User Management
Test State - 2018 PATH Grant Application
Application Progress: 26%
Overview
I. State Information
II. Executive Summary
III. State Level Information
PATH Reported Activities
Attachments
Application History
IUP User Management
I. State Information
Section Progress: 100%
Form Name
Last Updated User
Last Updated Date
Status
Change Status
Print
State Information
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Assurances - Non-Construction Programs
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Certifications
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Funding Agreement
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
Disclosure of Lobbying Activities
Andrew
4/30/2018 4:10:31 PM
Complete
Modify
Print
State PATH Regions
Andrew
5/2/2018 1:05:09 PM
Complete
Modify
Print
The Status of the State PATH Regions form is now "Complete". To change any forms prior to submission, click the Modify button.
Copyright © 2011 SAMHSA All rights reserved
Privacy | Disclaimer | FOIA | SPO List | State Contact
Help Desk Number: 1-888-301-BGAS(2427) | Help Desk
Website: v10.8.0.0, 4/28/2018 11:13 PM; Database:
Adobe™ PDF and MS Office™ formatted files require software viewer programs to properly read them. Click here to download these FREE programs now.

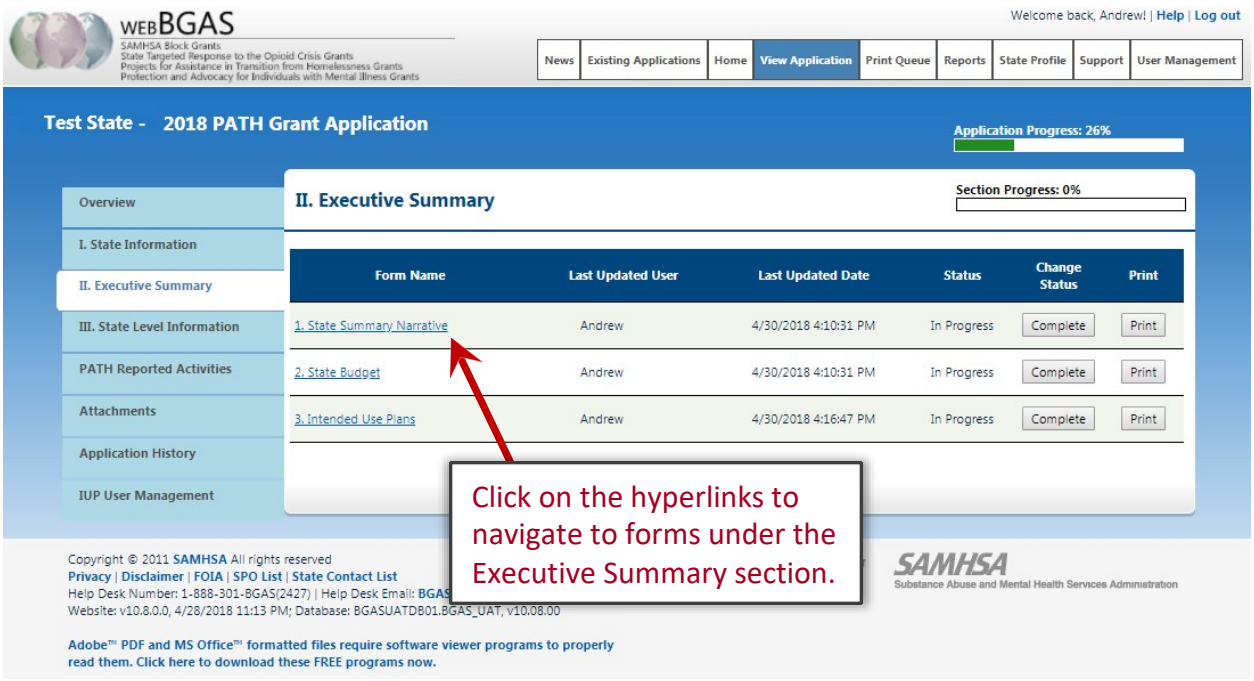
Executive Summary Section

The second section of the PATH Grant Application is the Executive Summary section. This section has three forms to be completed:

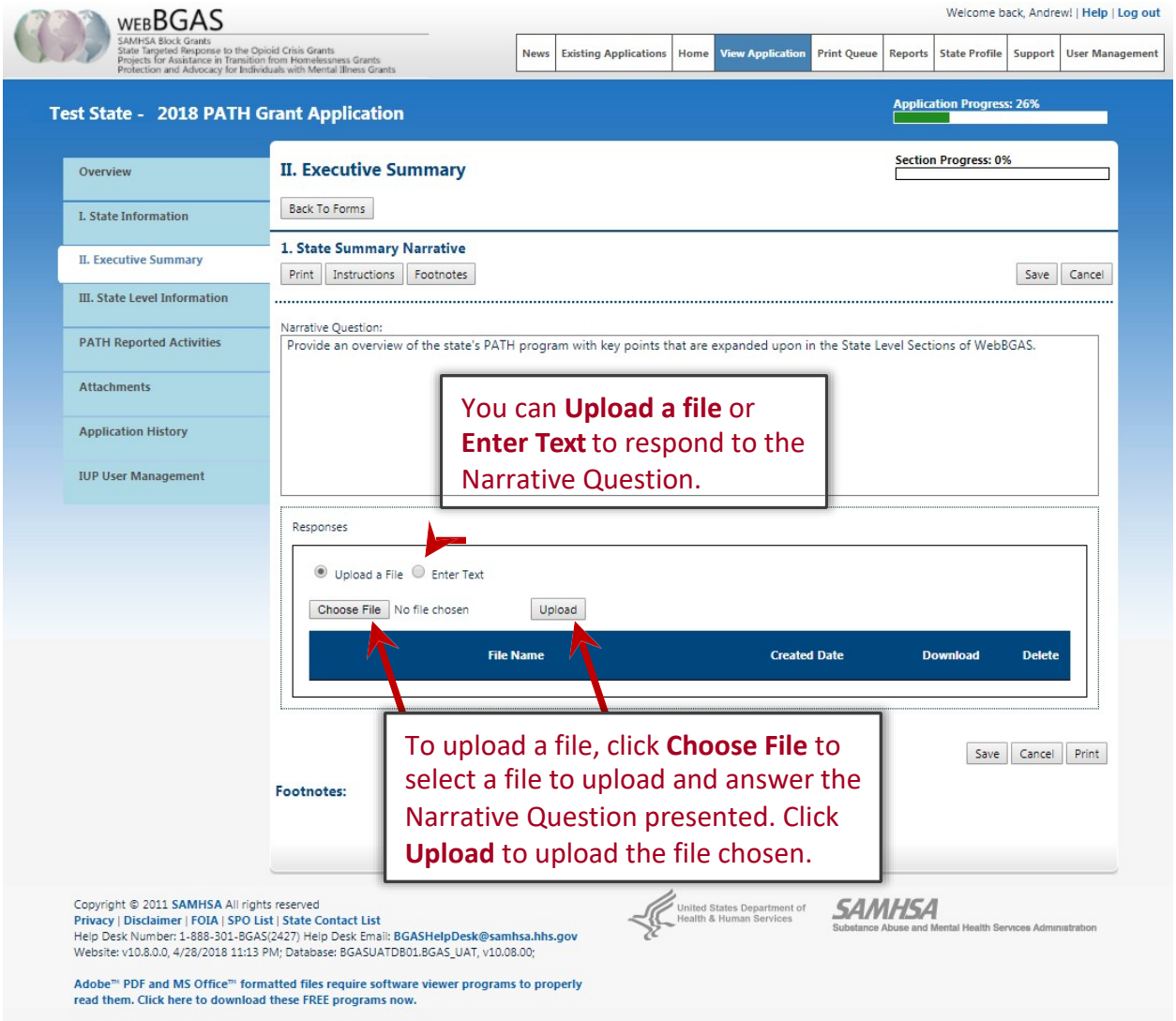
- State Summary Narrative
- State Budget
- Intended Use Plans (IUPs)

The State Summary Narrative provides an overview of the state's PATH program with key points that are expanded upon in the State Level Sections of WebBGAS. The State Budget has the consolidated State-level budget, as well as the detailed State budget. Intended Use Plans (IUPs) allow entry of the individual IUP descriptions and budgets.

We will start with the State Summary Narrative.

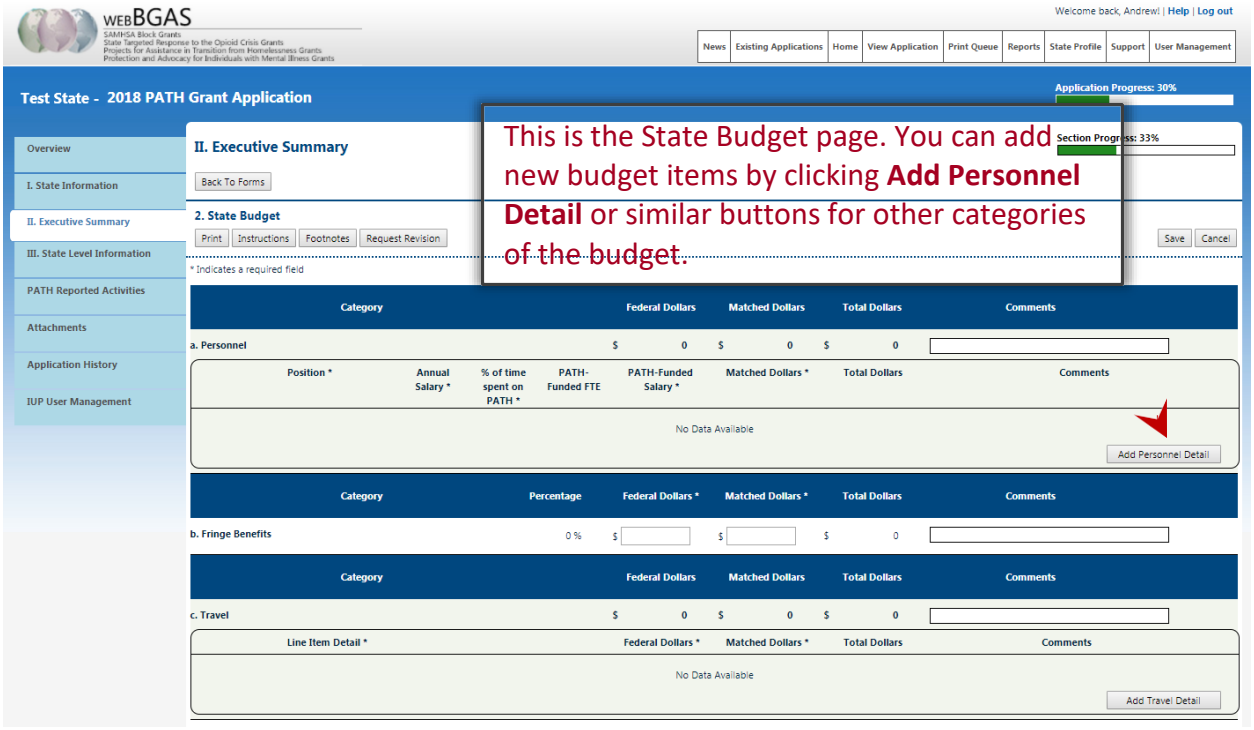


State Summary Narrative

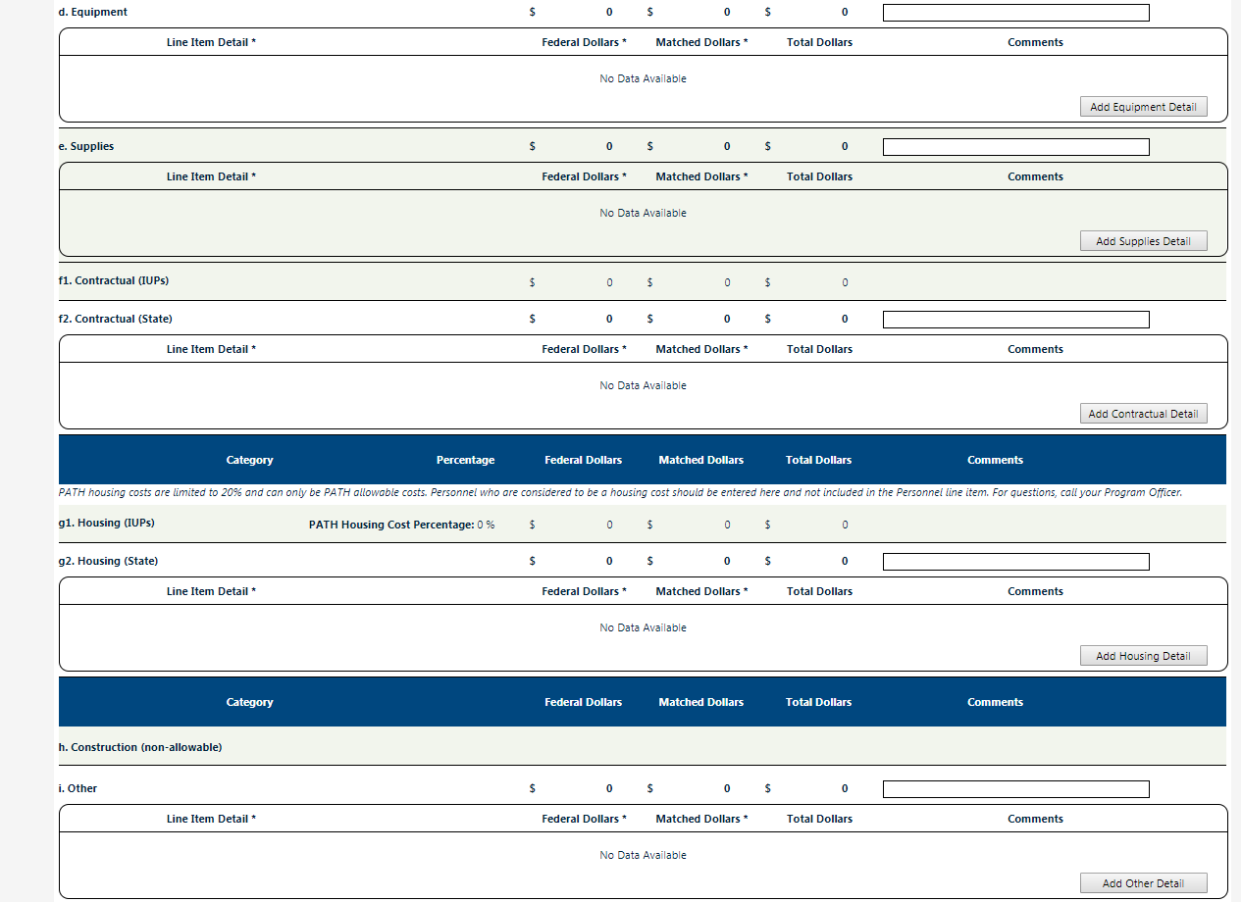


Complete the State Summary Narrative by uploading a document or entering text to respond to the Narrative Question posed.

State Budget



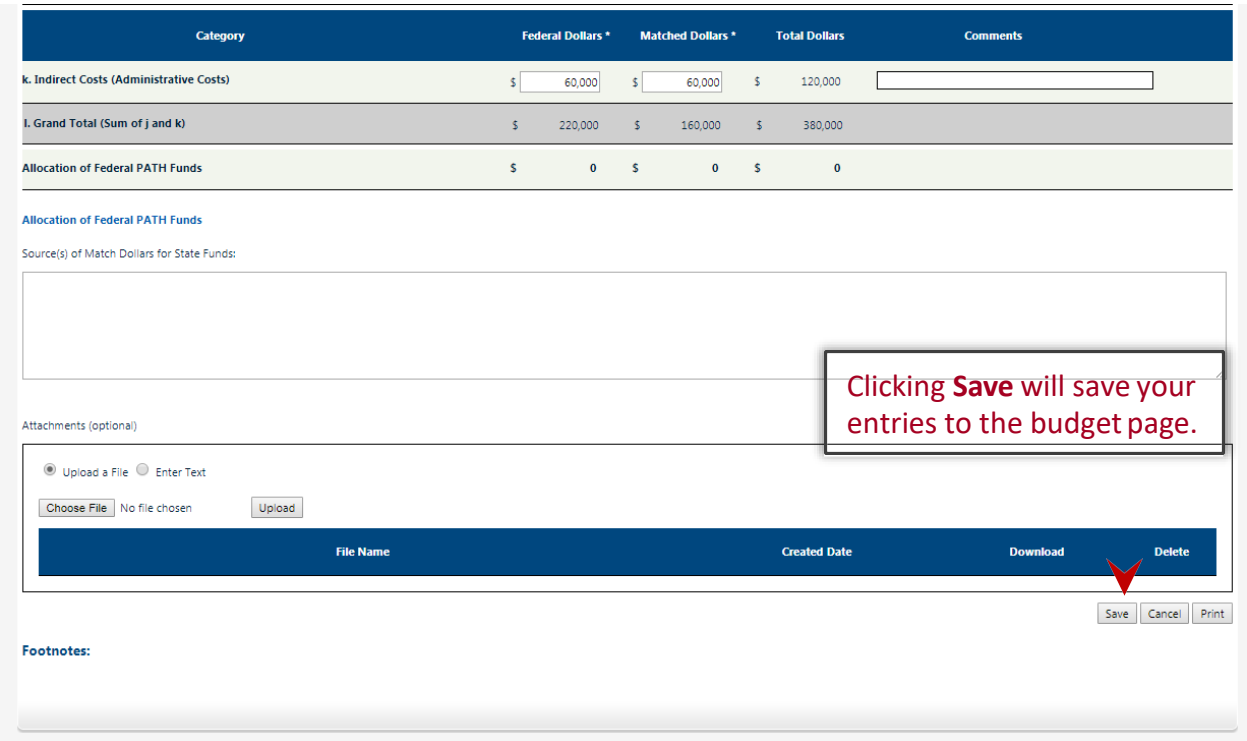
Simply fill in the State Budget Amounts by Line Item within each Category. The screenshot above only displays the first few categories; scrolling down reveals more.



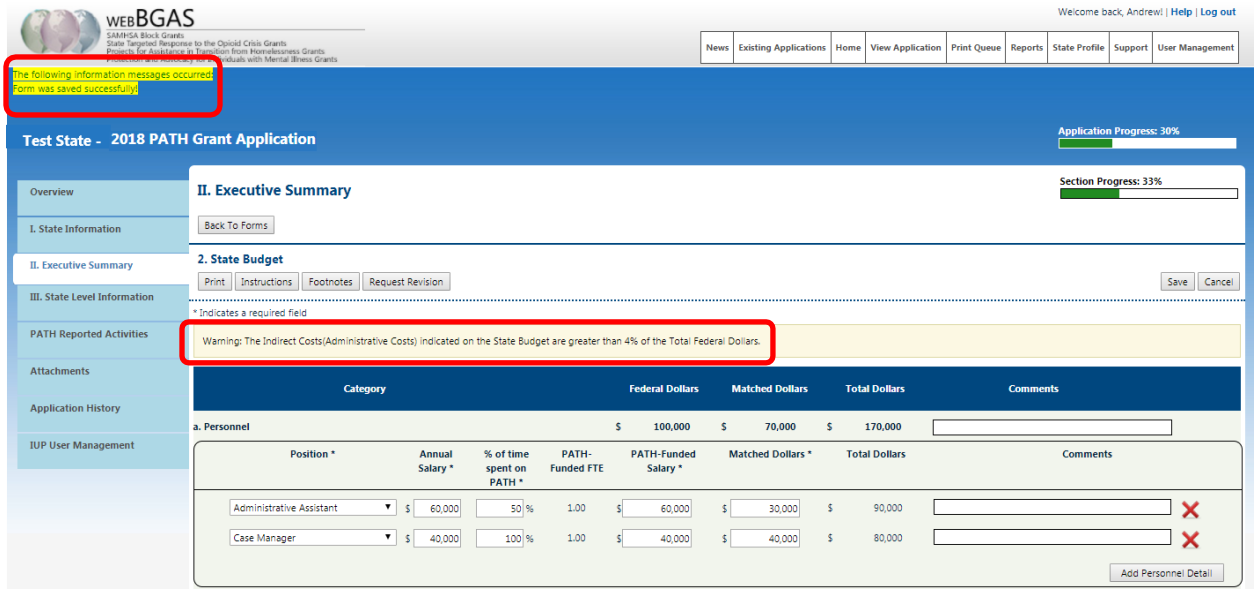
HELPFUL TIP:

IUP Budget information is reflected in the **Contractual (IUP)** lines and is automatically populated by the IUP users.

After adding all budget items to their corresponding categories, totals should automatically calculate. You may save your progress by clicking **Save** toward the bottom of the page.



A highlighted message appears in the upper left corner of the screen indicating the success of your budgetary entries. It is important to pay attention to these highlighted messages – they may say something other than "Form was saved successfully!"

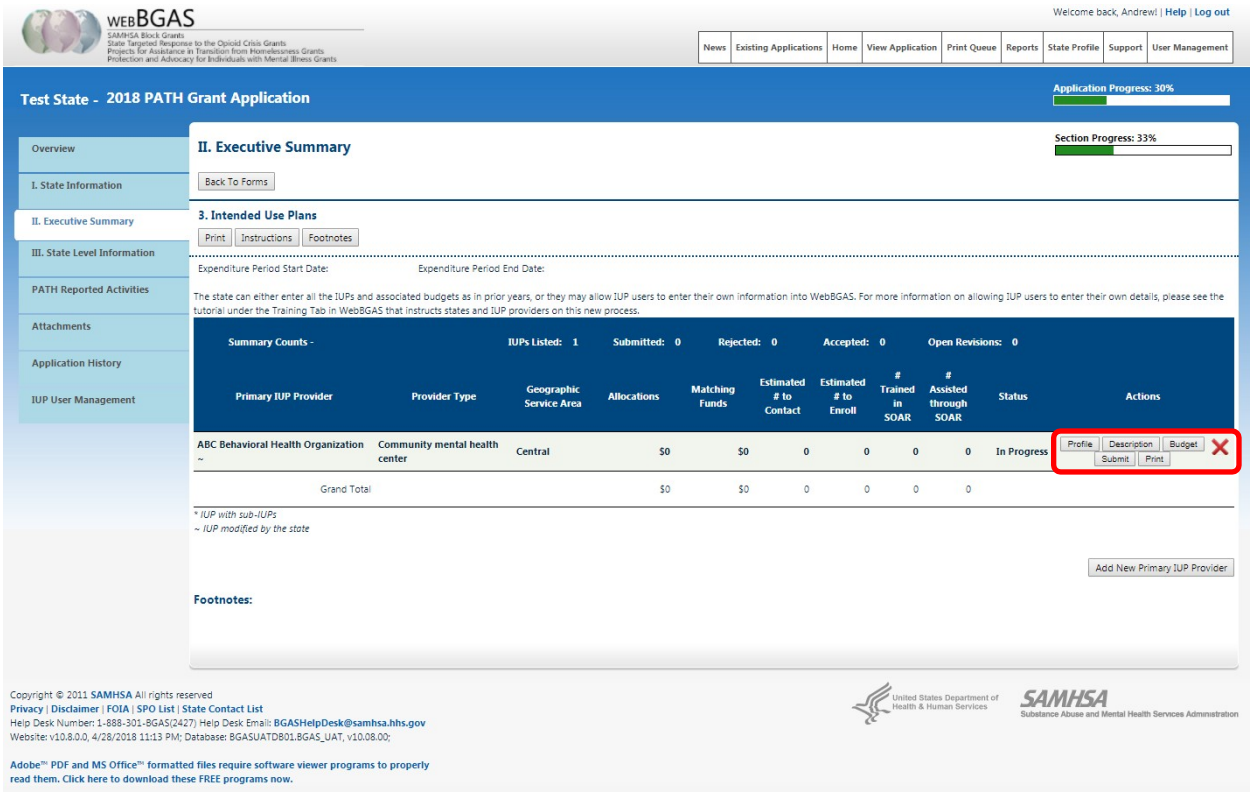


IMPORTANT REMINDER:

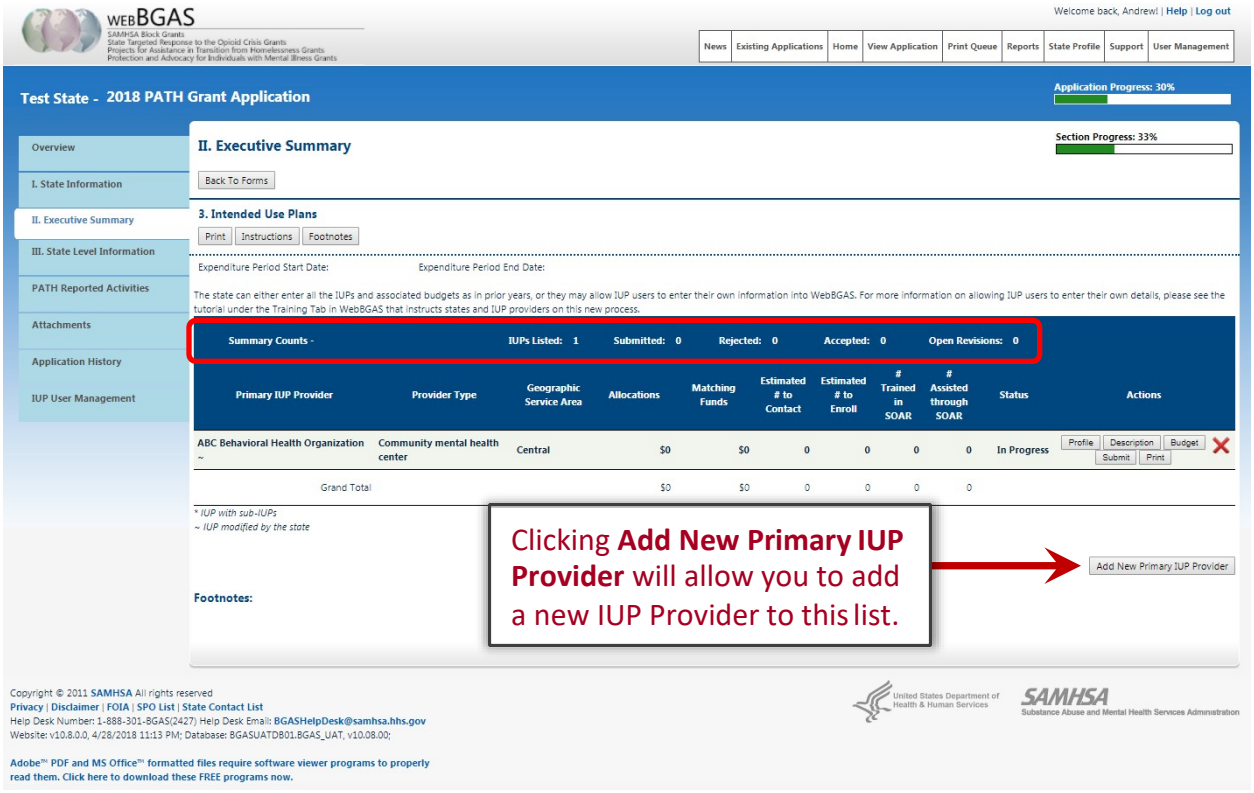
Warning messages will appear at the top of the Budget page of the application if the Total Matched Dollars of any category are less than the required amount or if the Indirect Costs of any category are greater than 4% of the Total Federal Dollars.

Intended Use Plans (IUPs)

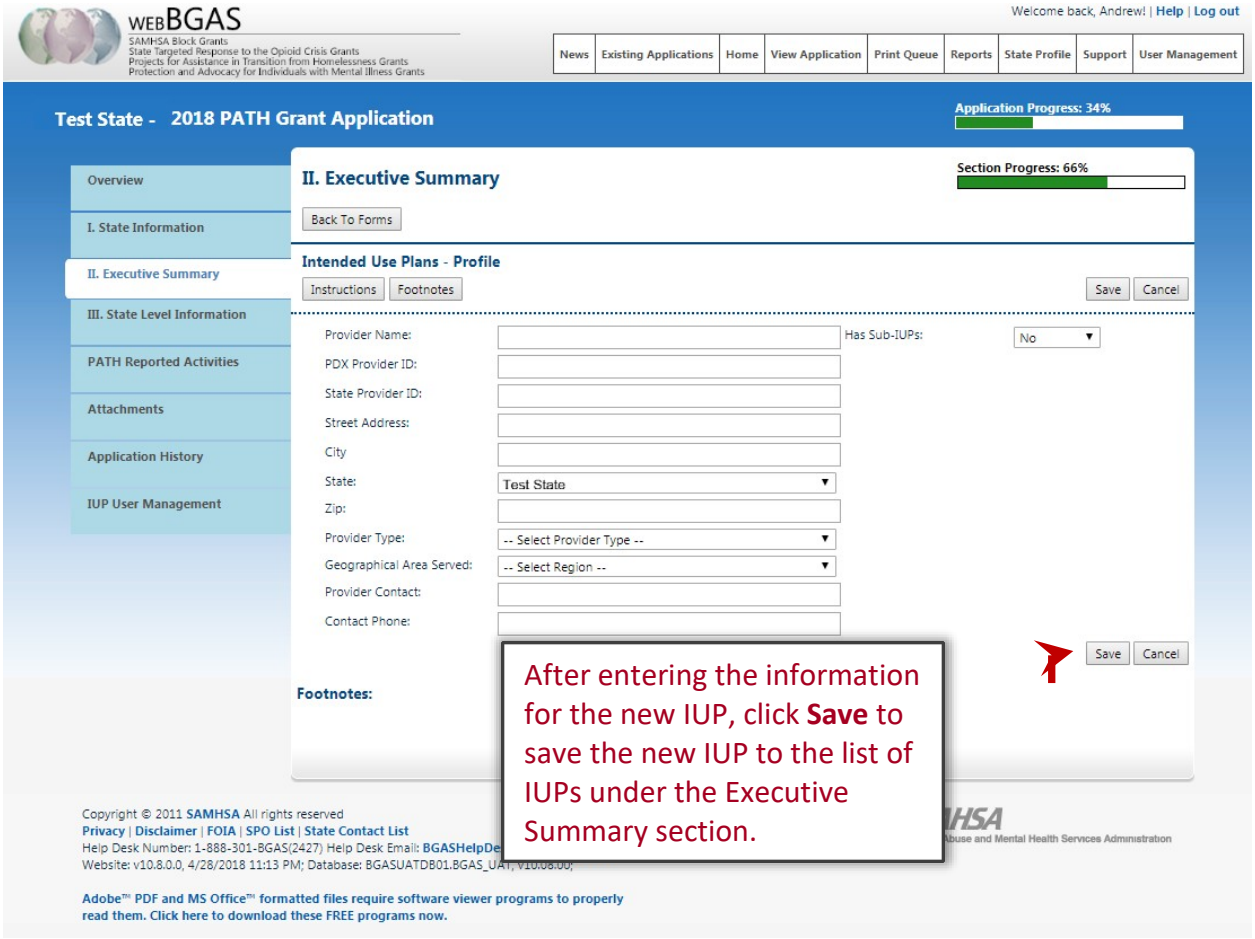
The following screenshot displays the Intended Use Plans form under the Executive Summary section of the PATH Grant Application.



When you first enter this screen, the list will be pre-populated with IUPs based on the prior year's application. The IUP budgets are imported from the 2017 application. **When you first open the budget, you must click 'Save' to accept the imported budget.** You may view or edit IUP information by clicking on the buttons under the Actions column. You may remove an IUP Provider from the list by clicking the X under the Actions column.



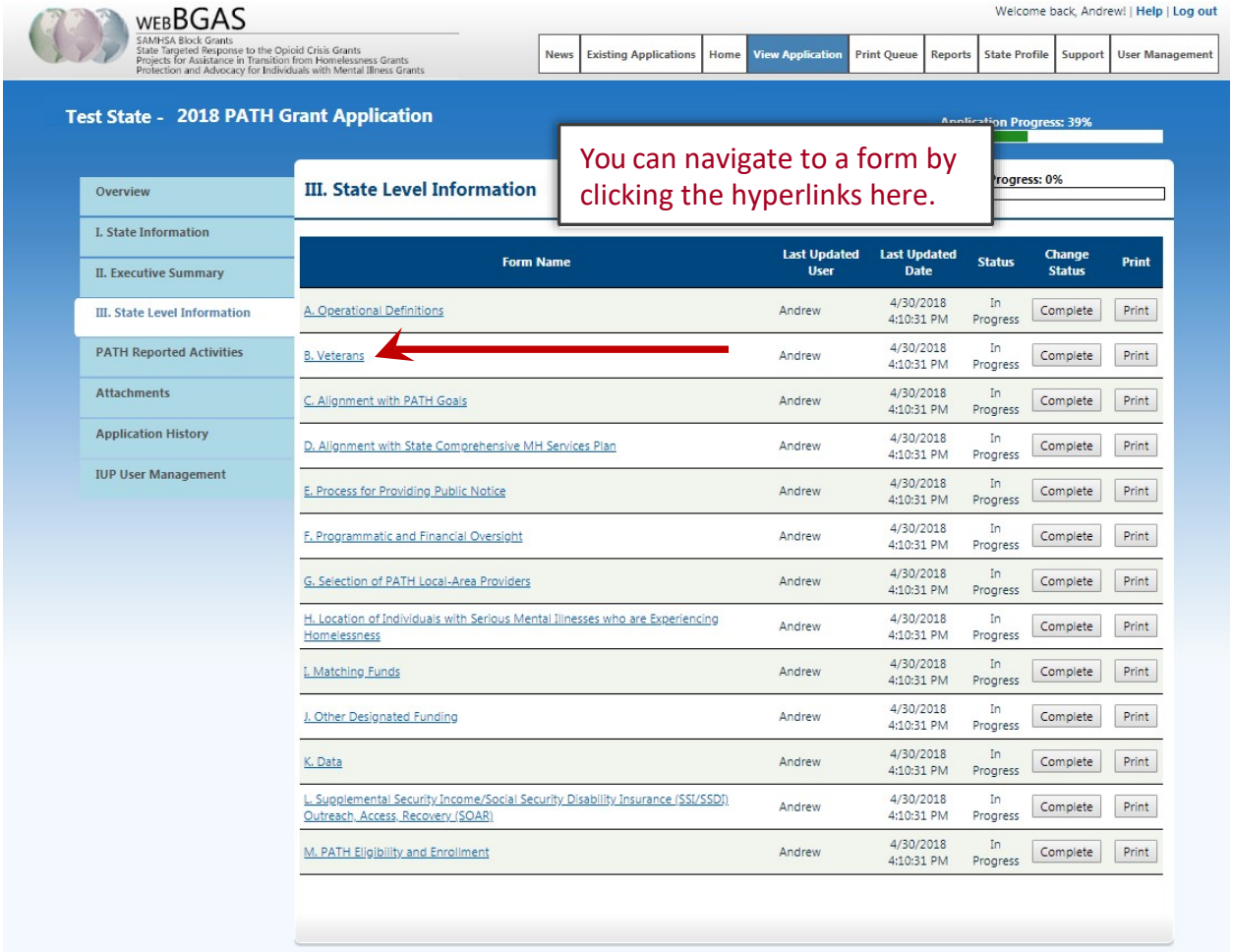
The top of the page includes a summary of the IUPs. IUPs can be added by clicking the button **Add New Primary IUP Provider**.



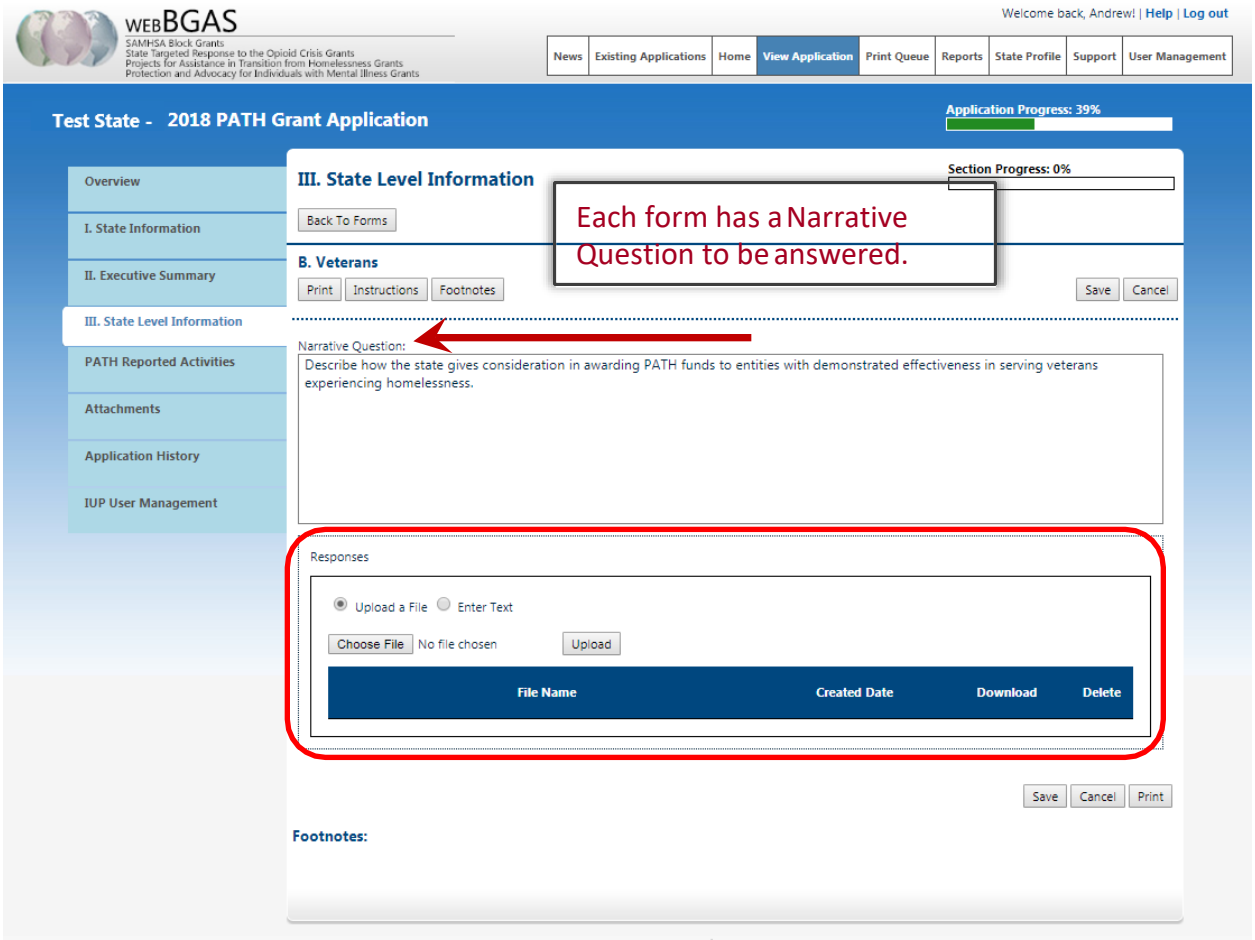
Enter the information for the new IUP provider in each field and click the **Save** button to complete the new entry.

State Level Information Section

The third section of the PATH Grant Application is the State Level Information section. This section contains thirteen (13) forms to be completed.



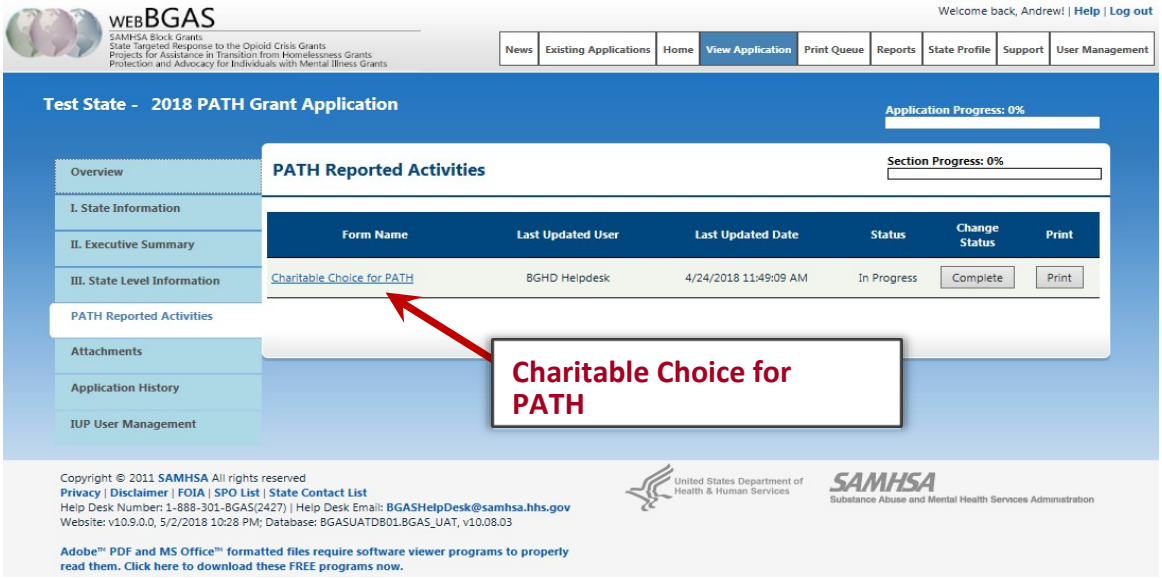
Since the forms in this section are similar to one another, we will use form **B. Veterans** as an example.



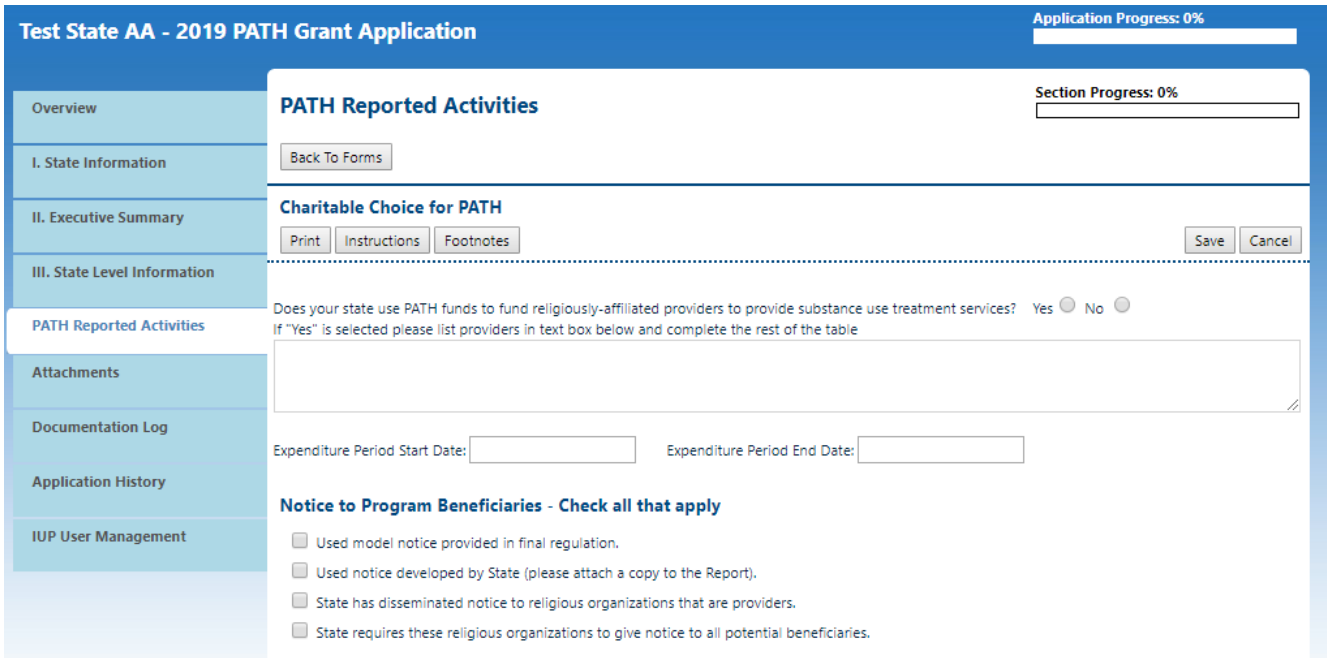
To complete this form, you may either upload a file or enter the text answer yourself. To conduct either action, select the proper radial button and either upload your attachment or type your response to the Narrative Question given.

6. PATH Reported Activities

The final section under the PATH Grant Application is the PATH Reported Activities section. This section contains the Charitable Choice for PATH form to be completed.

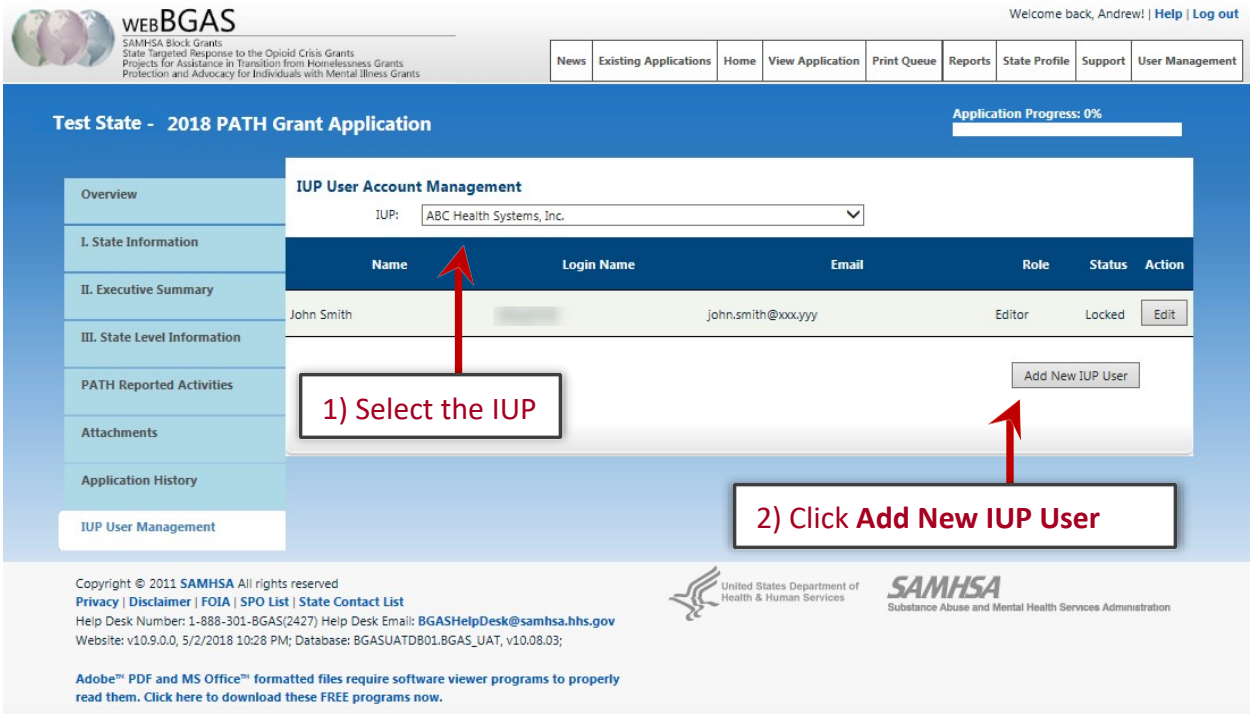


If your response to the first question is "Yes" enter the providers in the text field and complete the rest of the form. If your response is "No" the form will be grayed out. Click the "Save" button.

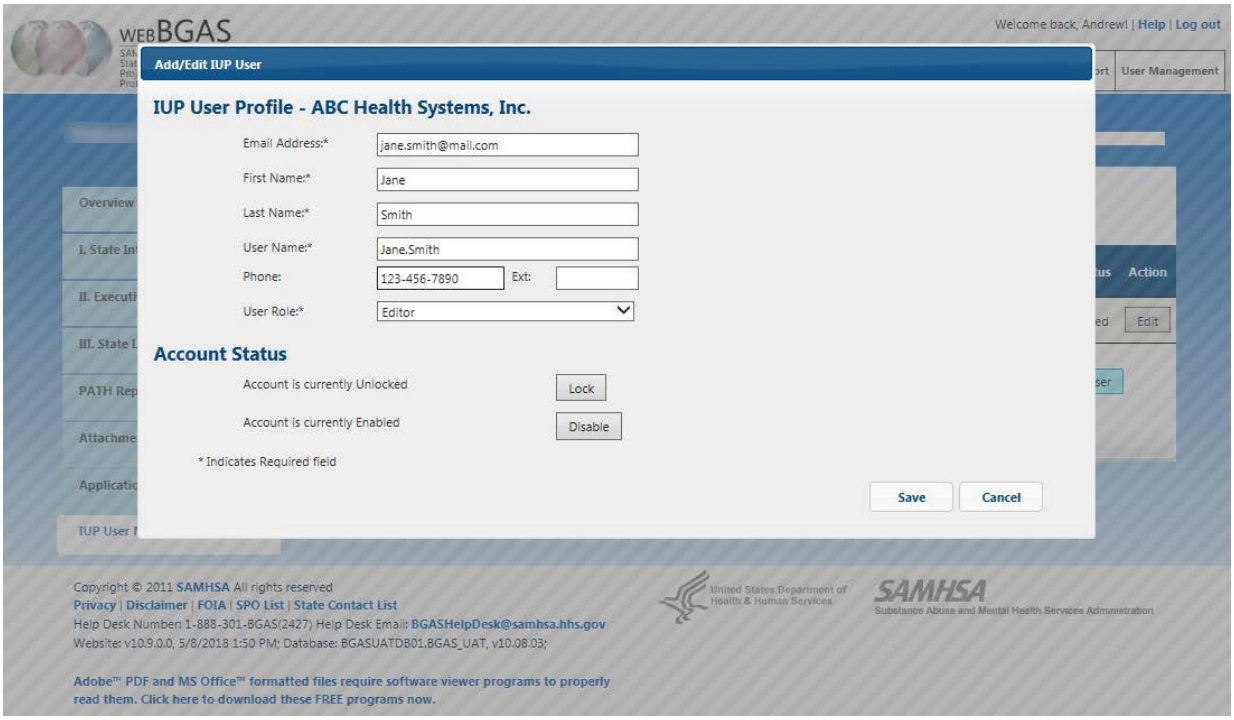


7. IUP User Management

IUPs can directly enter their description and budget information into WebBGAS. You can manage these IUP user accounts, including creating new IUP user accounts. To conduct IUP user management activities, click on the IUP User Management located on the menu at the left-hand side of the screen.

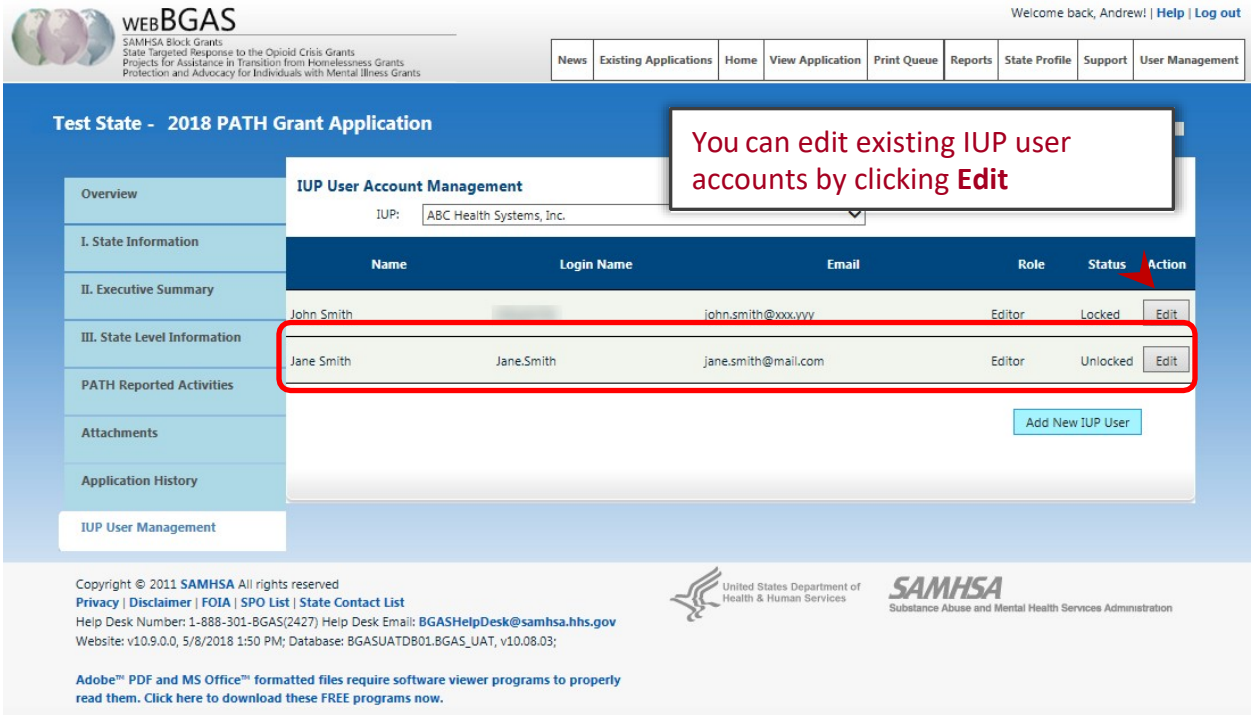


To add a new IUP user, you must first select the IUP from the drop-down menu. The **Add New IUP User** button will now appear and clicking this button will bring a pop-up window display to your screen.


WEBBGAS
Welcome back, Andrew! | Help | Log out
User Management
Add/Edit IUP User
IUP User Profile - ABC Health Systems, Inc.
Email Address:*
jane.smith@mail.com
First Name:*
Jane
Last Name:*
Smith
User Name:*
Jane.Smith
Phone:
123-456-7890
Ext:
User Role:*
Editor
Account Status
Account is currently Unlocked
Lock
Account is currently Enabled
Disable
* Indicates Required field
Save
Cancel
Overview
Action
Edit
Copyright © 2011 SAMHSA All rights reserved
Privacy | Disclaimer | FOIA | SPO List | State Contact List
Help Desk Number: 1-888-301-BGAS(2427) Help Desk Email: BGASHelpDesk@samhsa.hhs.gov
Website: v10.9.0.0, 5/8/2018 1:50 PM; Database: BGASUATDB01.BGAS_UAT, v10.08.03;
Adobe™ PDF and MS Office™ formatted files require software viewer programs to properly read them. Click here to download these FREE programs now.
United States Department of Health & Human Services
SAMHSA
Substance Abuse and Mental Health Services Administration

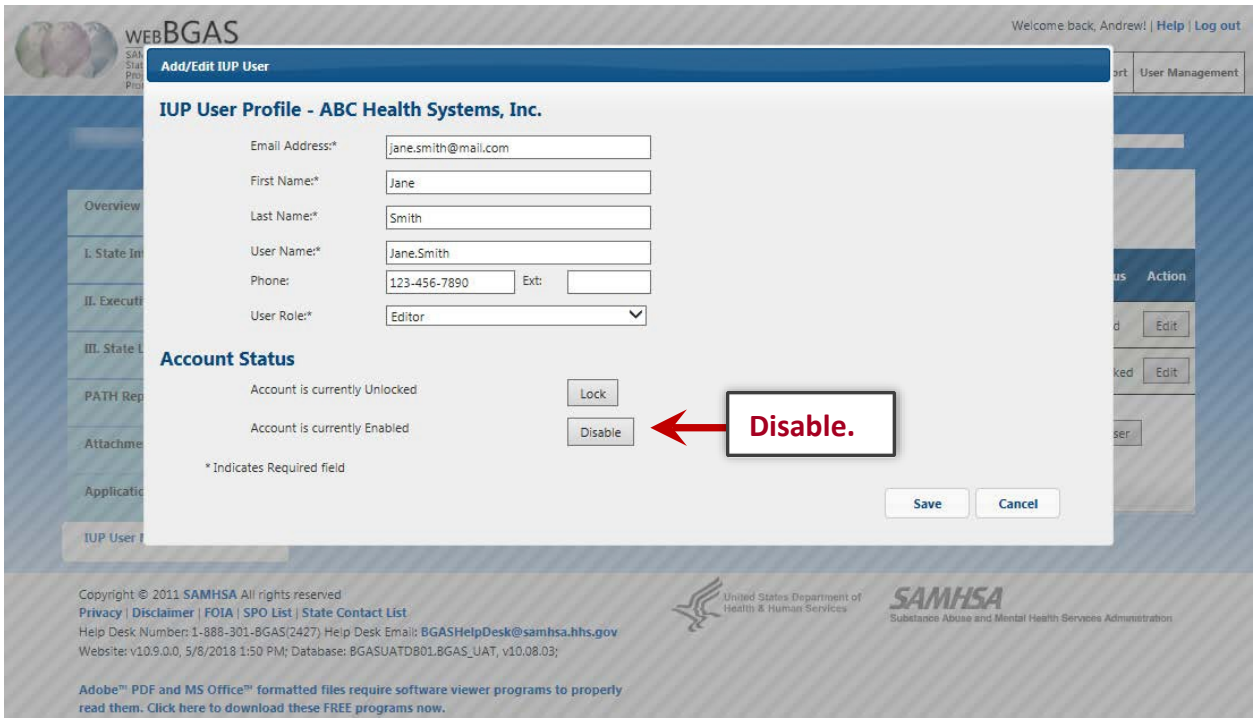
You may now enter the information into the empty fields. Please note the User Name field will be automatically generated by the system. You must select a role for every IUP user you add. The roles are Editor or Read Only.

Two separate emails, one with the username and the other with the temporary password are then sent to the email address you have provided.

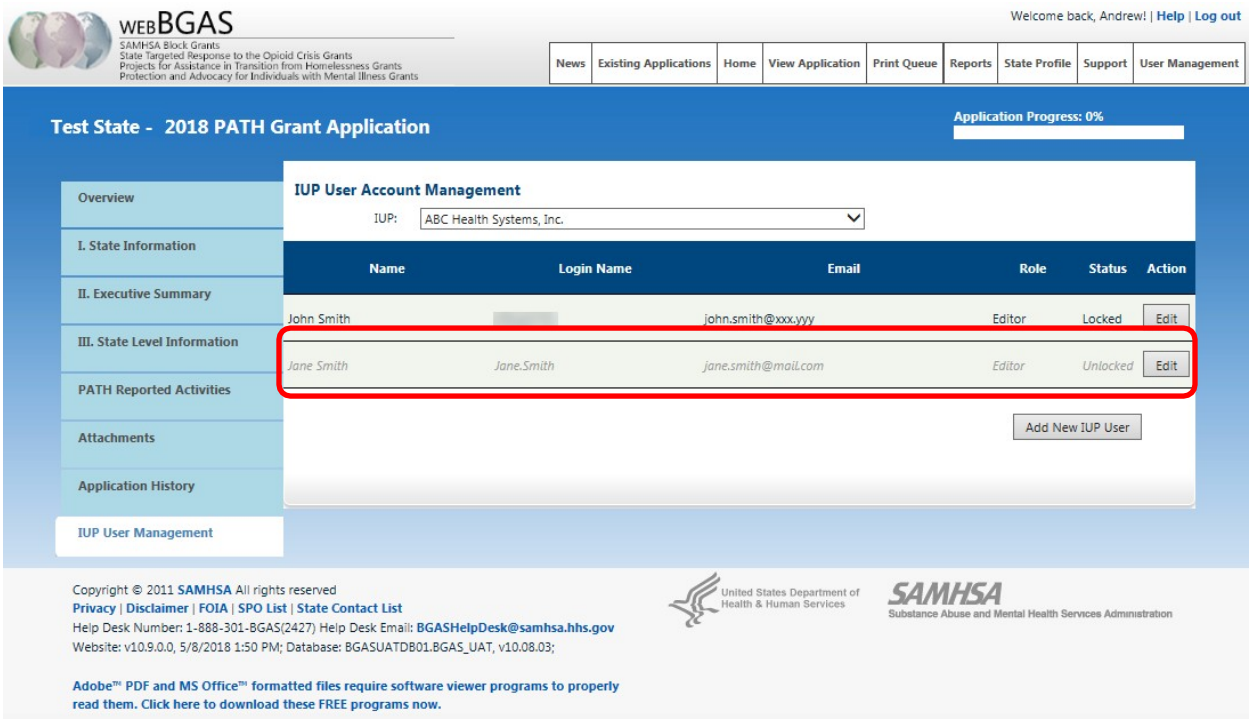


The new IUP User will appear on the list of IUP users on the IUP User Account Management page. There are no limits to the number of IUP user accounts.

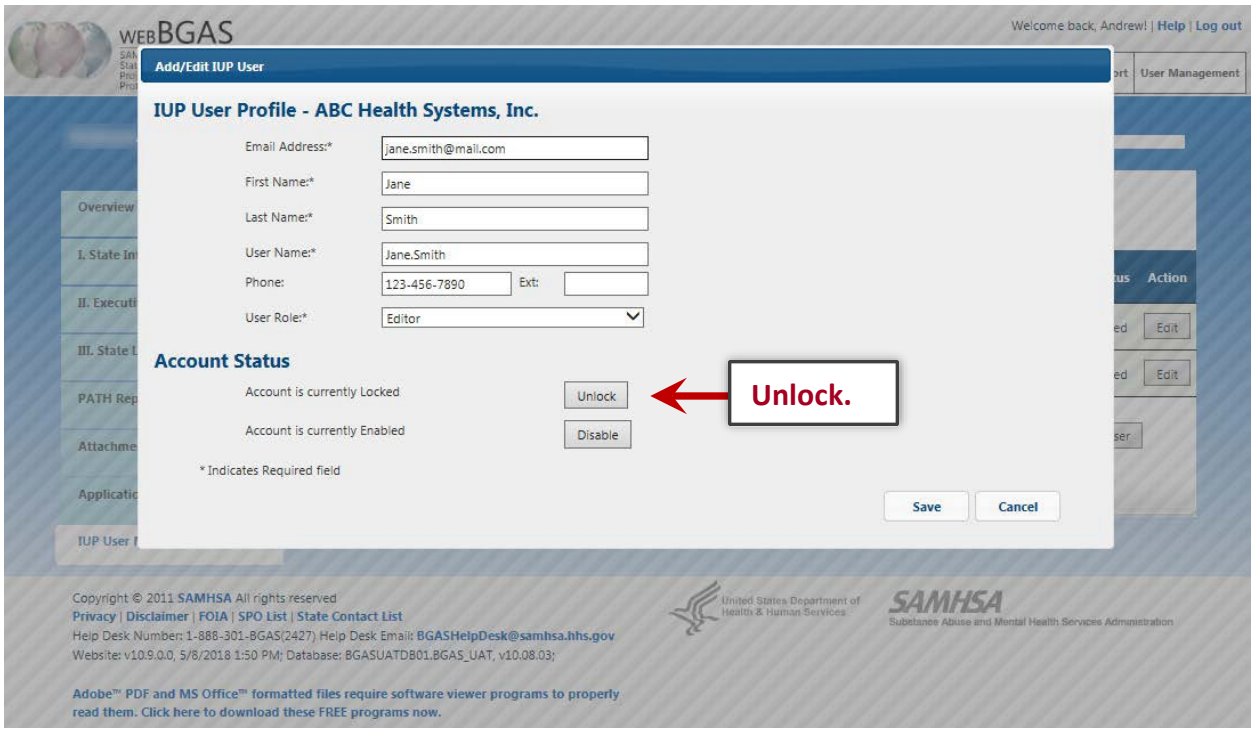
You can edit existing IUP user accounts by clicking the **Edit** button. Edits can include changing or updating relevant information about the IUP; they can also include disabling or locking the IUP user account.



To disable an IUP user, after clicking the **Edit** button a pop-up window is displayed on your screen. Contained within this pop-up window is the **Disable** button. Clicking **Disable** and then clicking the **Save** button will disable the IUP user account.



The IUP user account becomes grayed-out, indicating that it has been disabled.

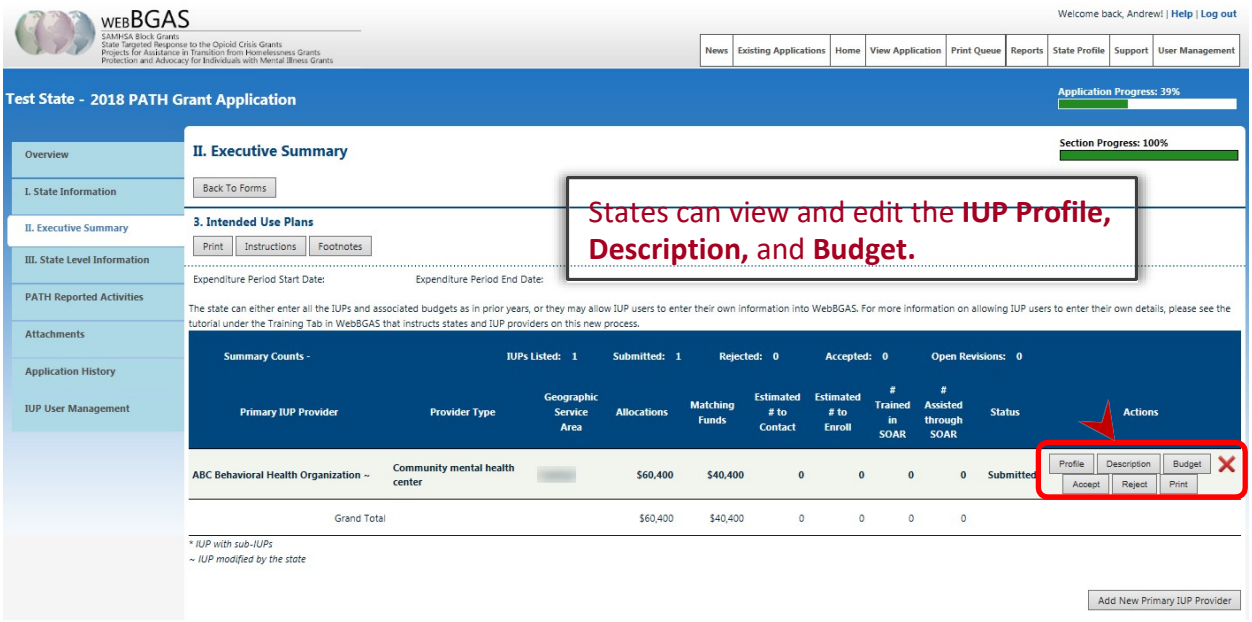


Similarly, you may lock or unlock an IUP user account by clicking the **Edit** button and then clicking the **Unlock** and subsequently the **Save** buttons.

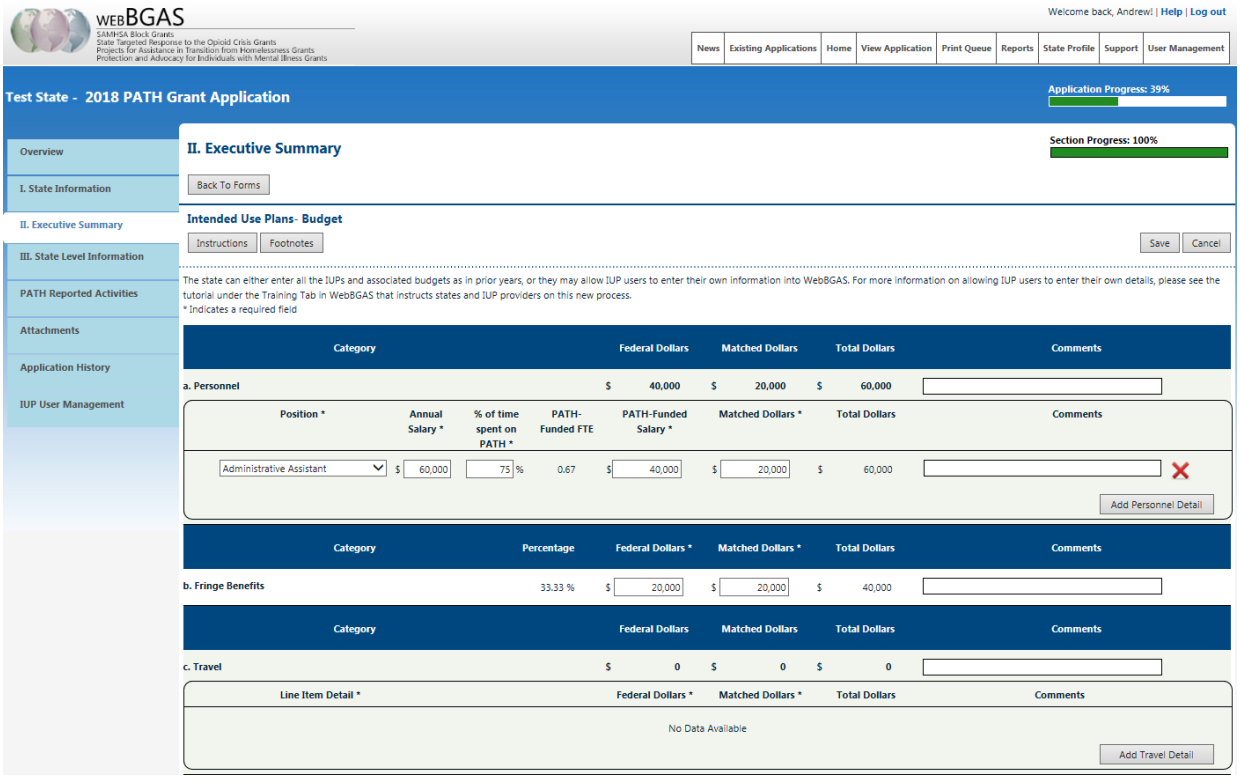
An IUP user account can be locked but not disabled.

8. State Review of IUP Applications

After an IUP application has been submitted, you must review their application for accuracy and quality assurance. To do this, navigate back to the Executive Summary section of the PATH Grant Application and click on the Intended Use Plans heading under the Executive Summary section.

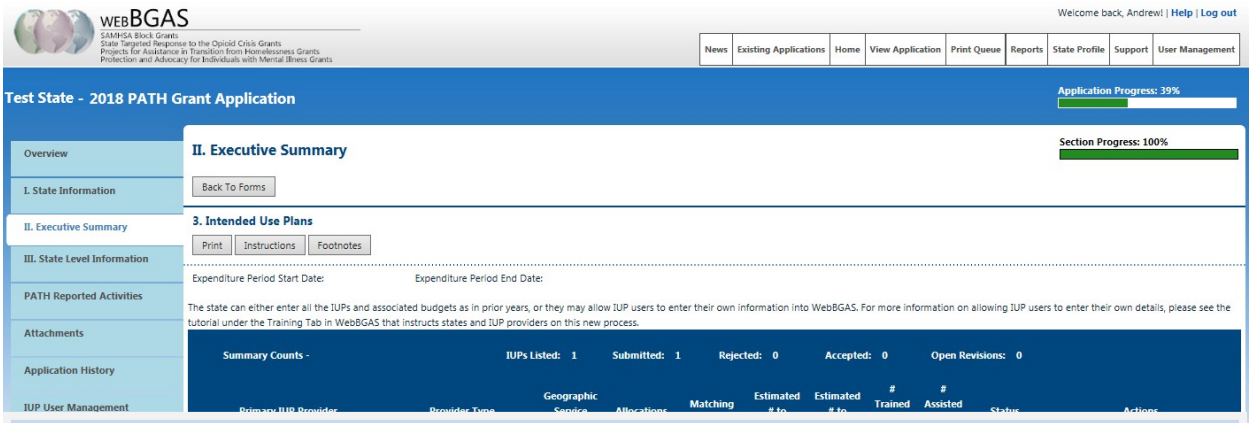


Clicking on the **Budget** button will allow you to view what the IUP has entered and submitted.



You should review all IUP applications. If you notice changes to be addressed, you may either make the changes manually or reject the application. If you choose to manually make the change, be sure to click **Save** after making the change.

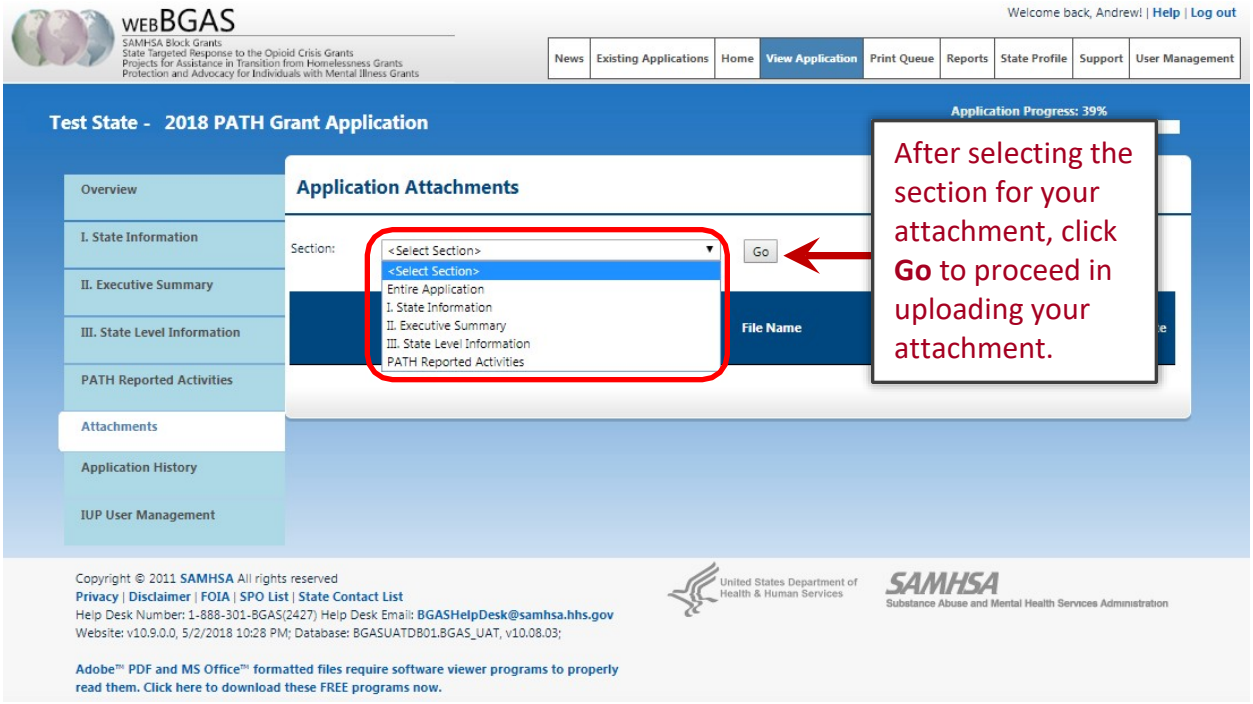
If you choose to reject the application, it will open back up for the IUP user to correct. The Status column will change to "Rejected".



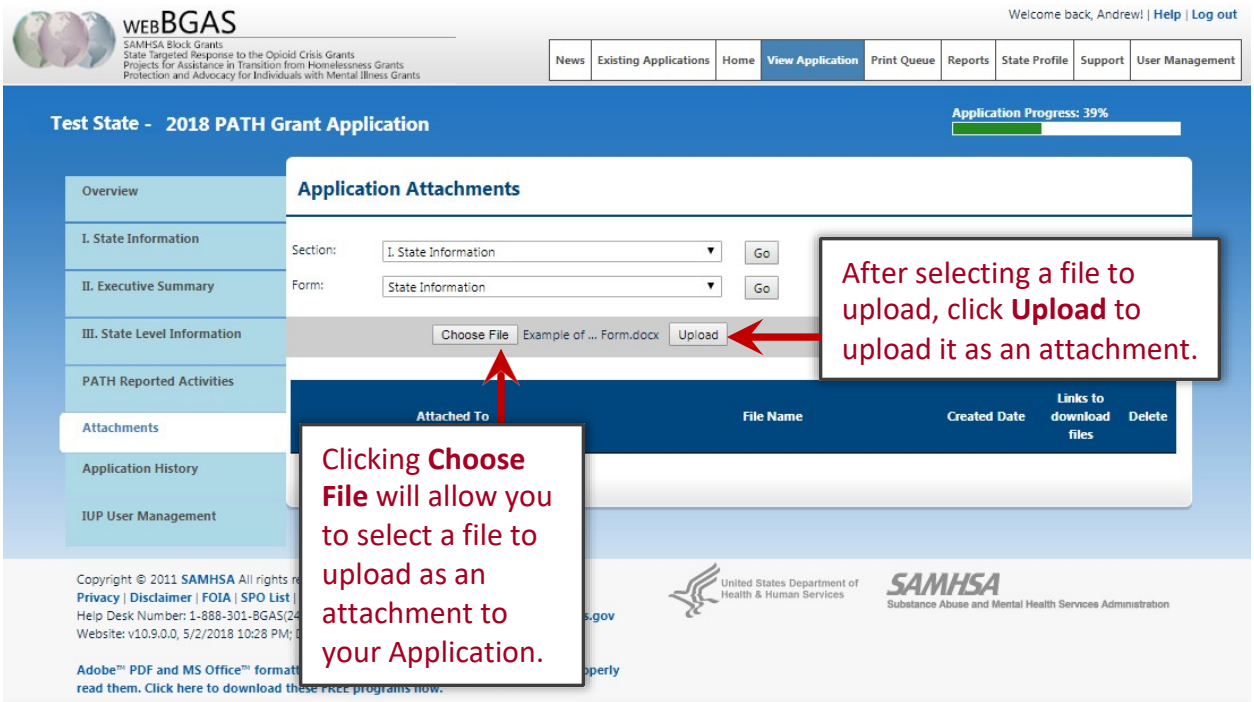
HELPFUL TIP:

IUP users are **NOT** automatically notified when the IUP application is rejected. Please contact the IUP Provider directly, outside of BGAS, with the necessary changes to the application.

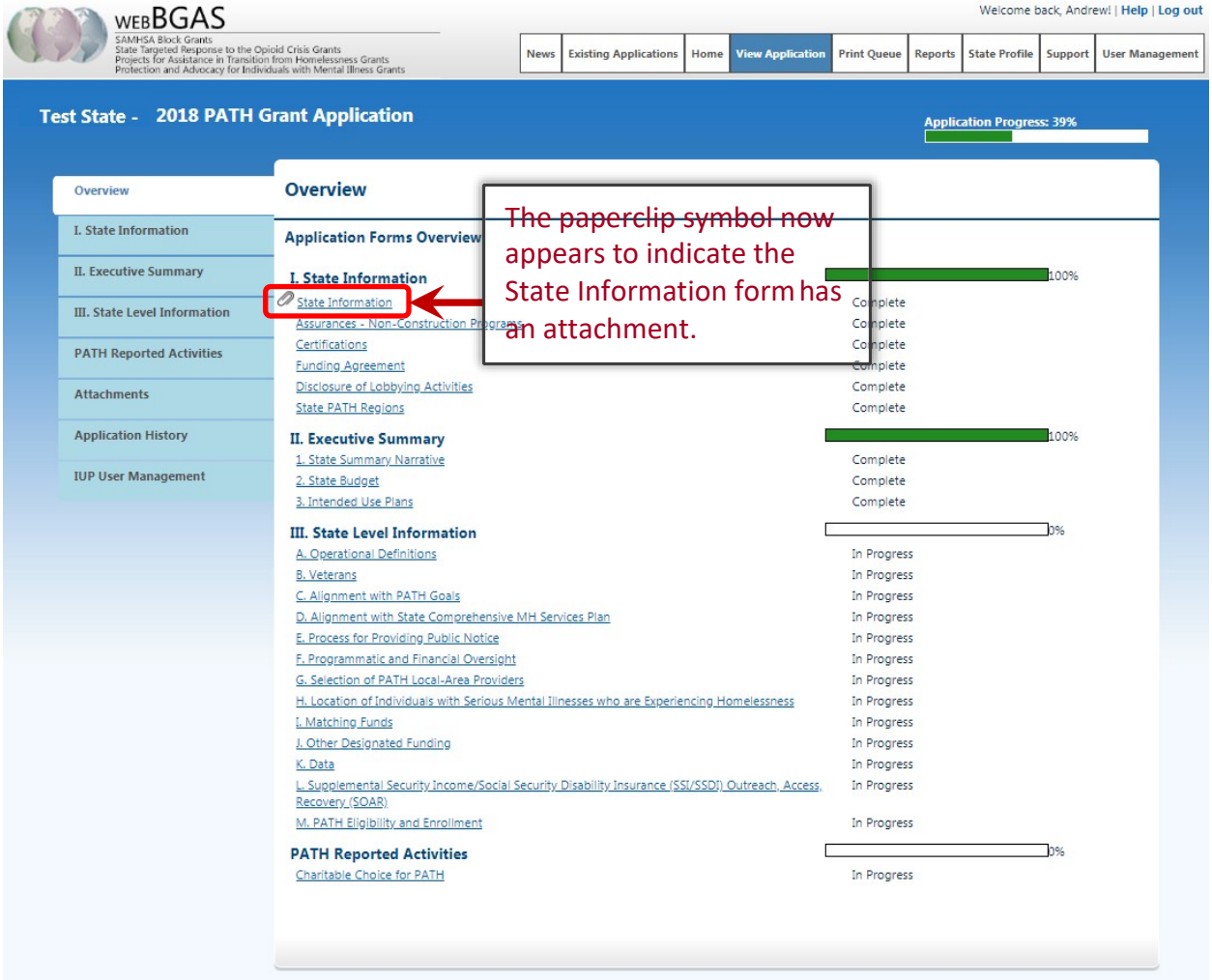
9. Application Attachments



Application Attachments are organized by the section of the PATH Grant Application to which they are attached. Please select the relevant section (or the Entire Application) from the drop-down menu and click the **Go** button.



Attachments are visible here. Additionally, you may add any attachments to your PATH Grant Application through this page by clicking first the **Choose File** button, selecting a file to attach, and clicking the **Upload** button.

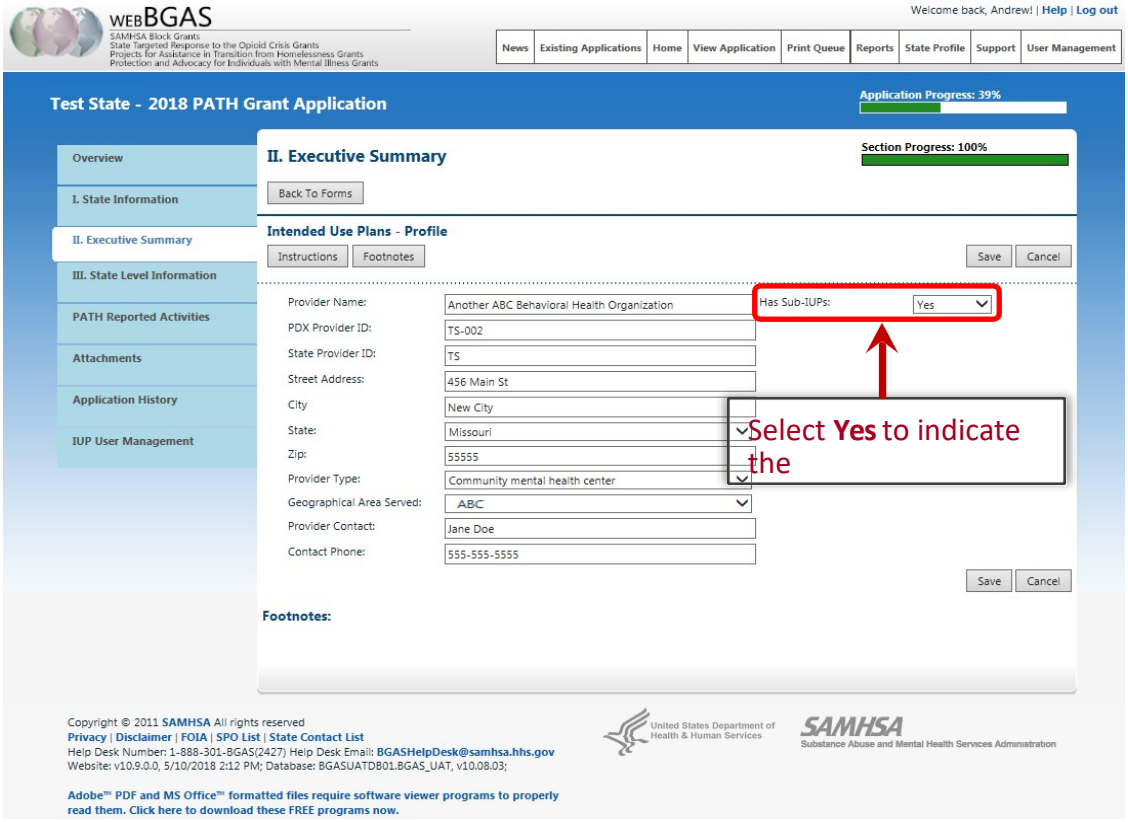


Attachments are also visible on the Overview page, with a paperclip indicating a section or form of your PATH Grant Application has an attachment.

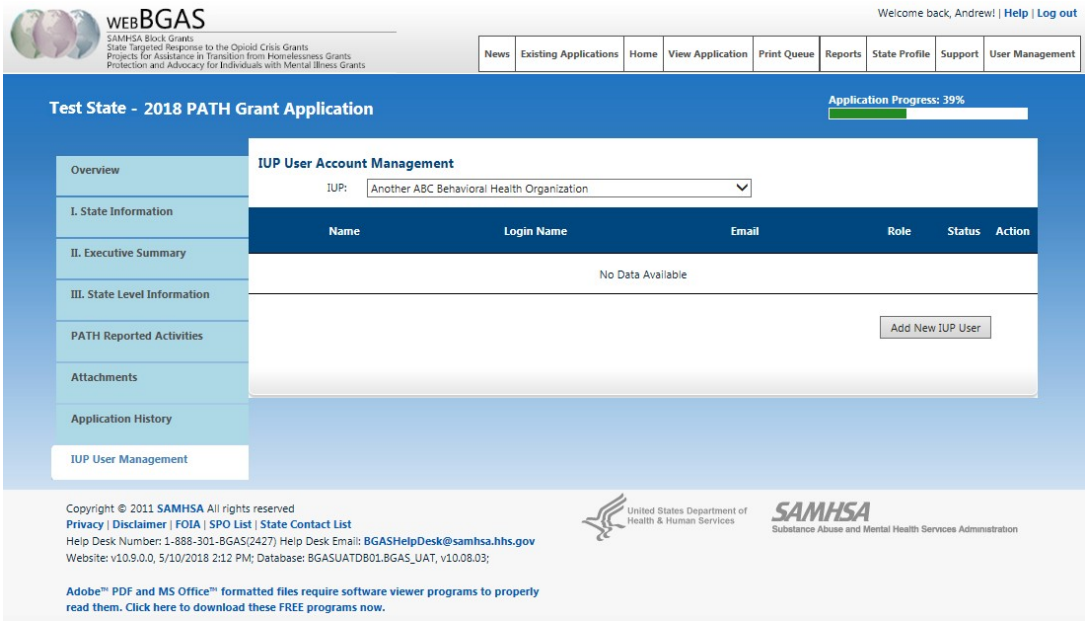
HELPFUL TIP:

Clicking on the paperclip on the Overview page will take you directly to the Attachments screen so you may open the attachment.

10. Handling Sub-IUPs (when applicable)



If your IUP has sub-IUPs, you will have to select the appropriate option – "Yes" – from the drop-down menu when adding a new primary IUP Provider.

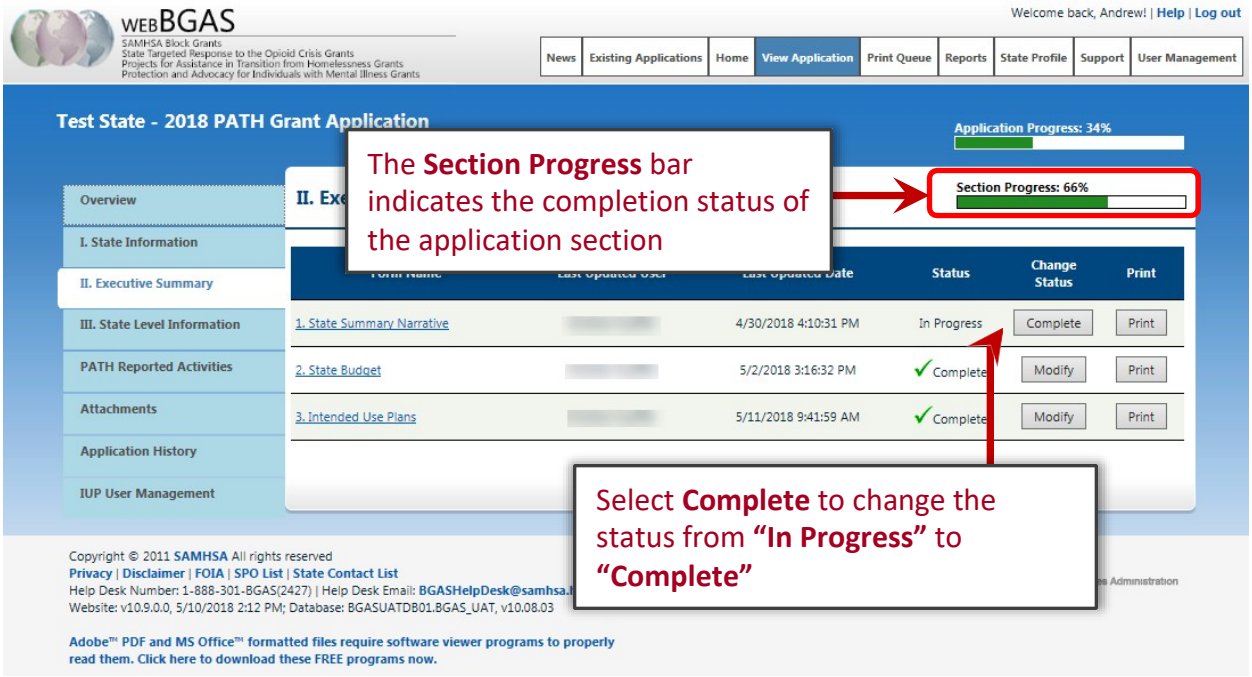


You must add an IUP user account for this new IUP as well.

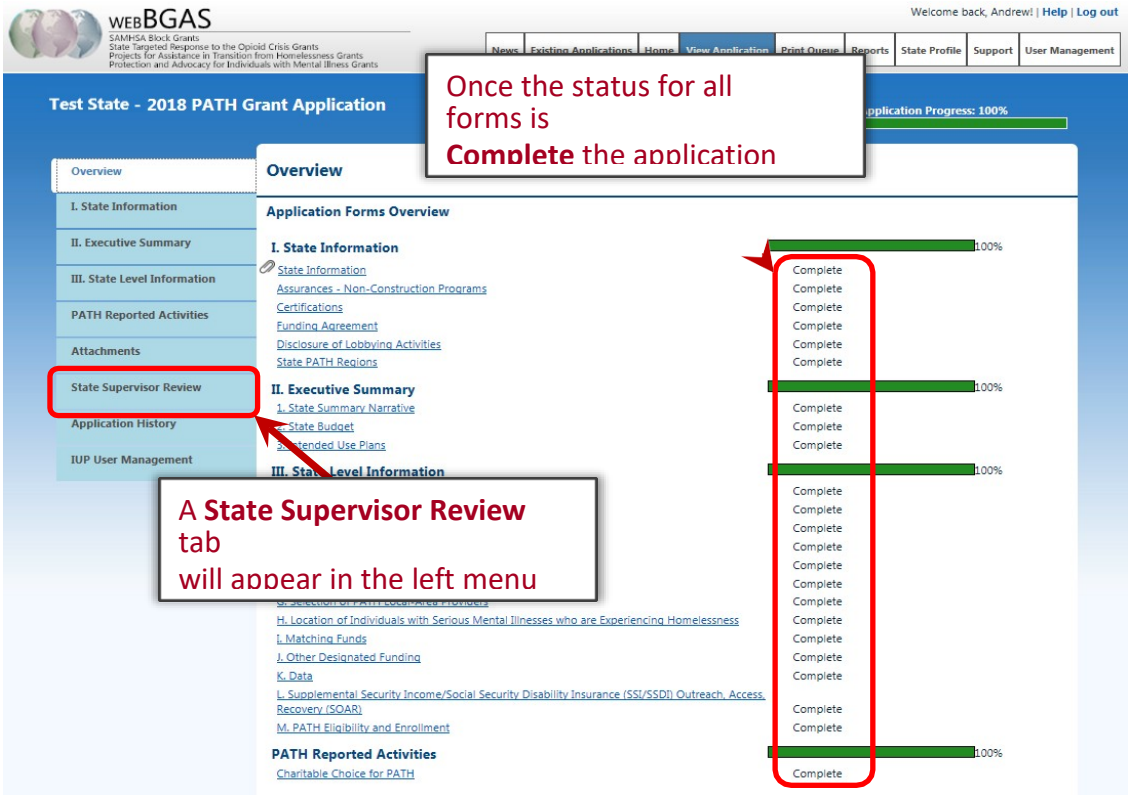
11. Completing & Reviewing the PATH Application and Submitting to SAMHSA

To complete the PATH Grant Application, you must update the status of each section individually. Using the navigation menu on the left side of the screen, you can navigate to each section and change the status. This can be done after each individual form of a section is filled out or it can be done entirely at the end – it is up to your preferences for this application process.

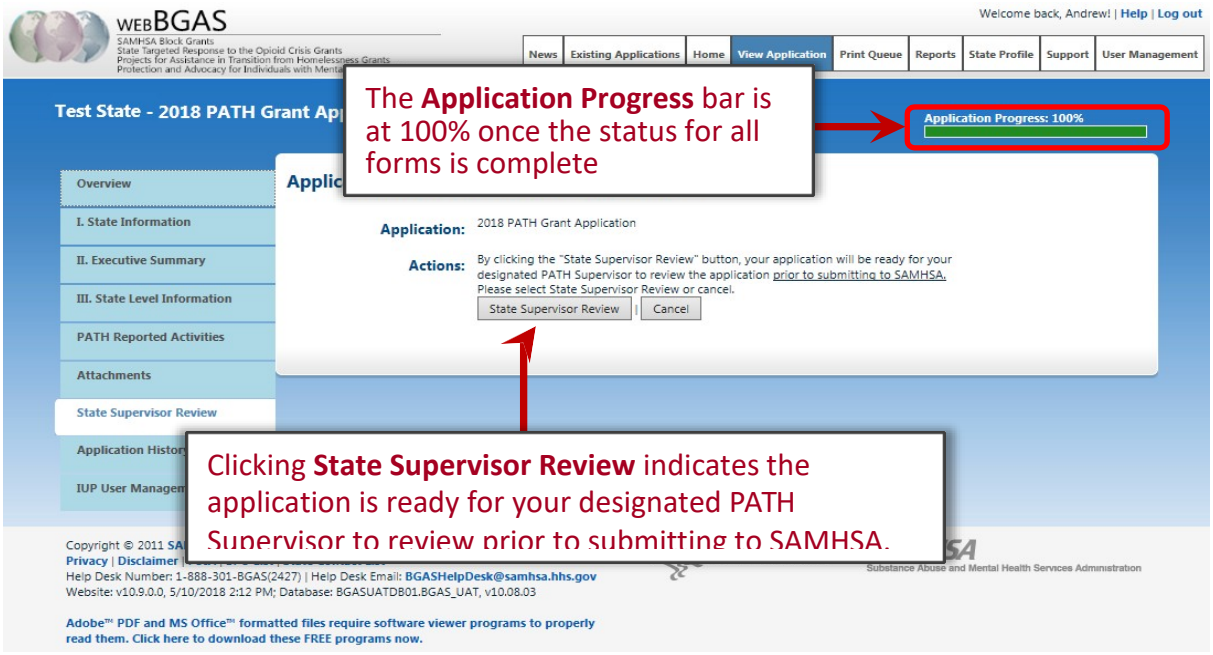
To complete a section, navigate to the section page by clicking the tabs on the left side navigation menu.



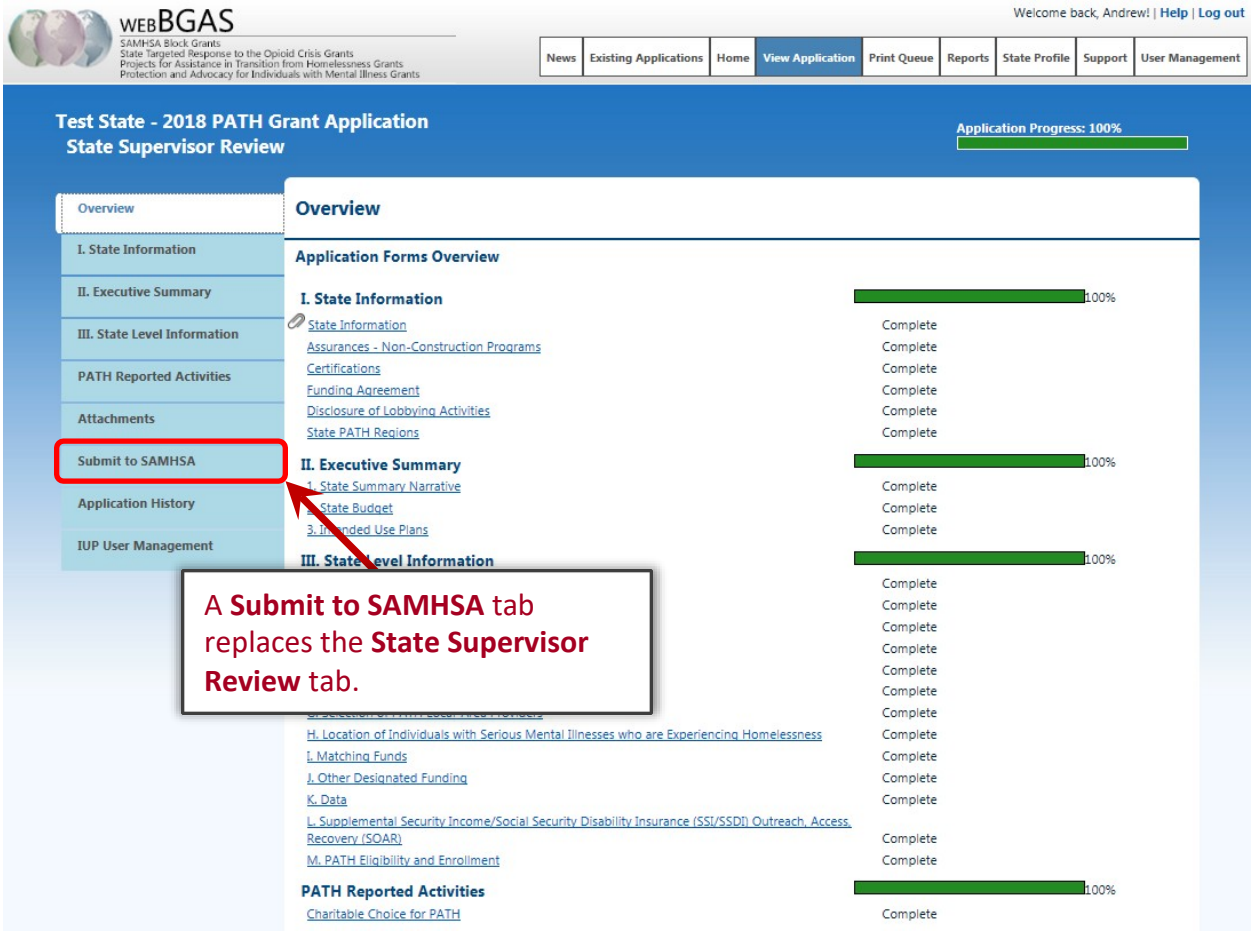
Clicking on the **Complete** button will change the status of the form from "In Progress" to "Complete". Each form must be complete for a section to be complete. Once all forms in all sections of the PATH Grant Application are complete, a new tab will appear on the left side navigation menu: **State Supervisor Review**.



Clicking the **State Supervisor Review** button will indicate the application is ready for your designated PATH Supervisor to review prior to submitting to SAMHSA.

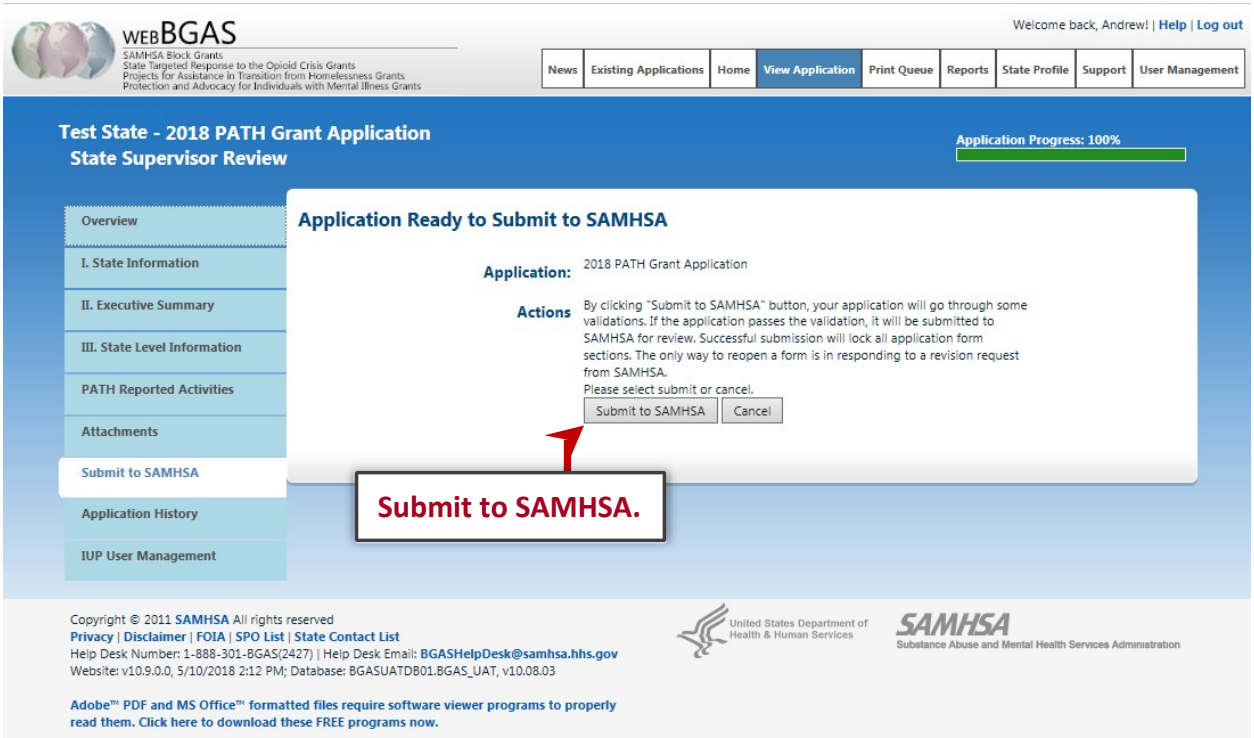


PATH Supervisor is a security role within WebBGAS given to the person designated by your State as having the authority to submit the grant application electronically. This may be the SPC, PATH Supervisor, Grant Official, or someone else.



The PATH Supervisor will be notified via email that the PATH application is ready for their review. They will see a **Submit to SAMHSA** tab on the left side navigation menu. This **Submit to SAMHSA** tab will take the place of **State Supervisor Review**.

Once the final review is complete, you are ready to submit your PATH Grant Application to SAMHSA.

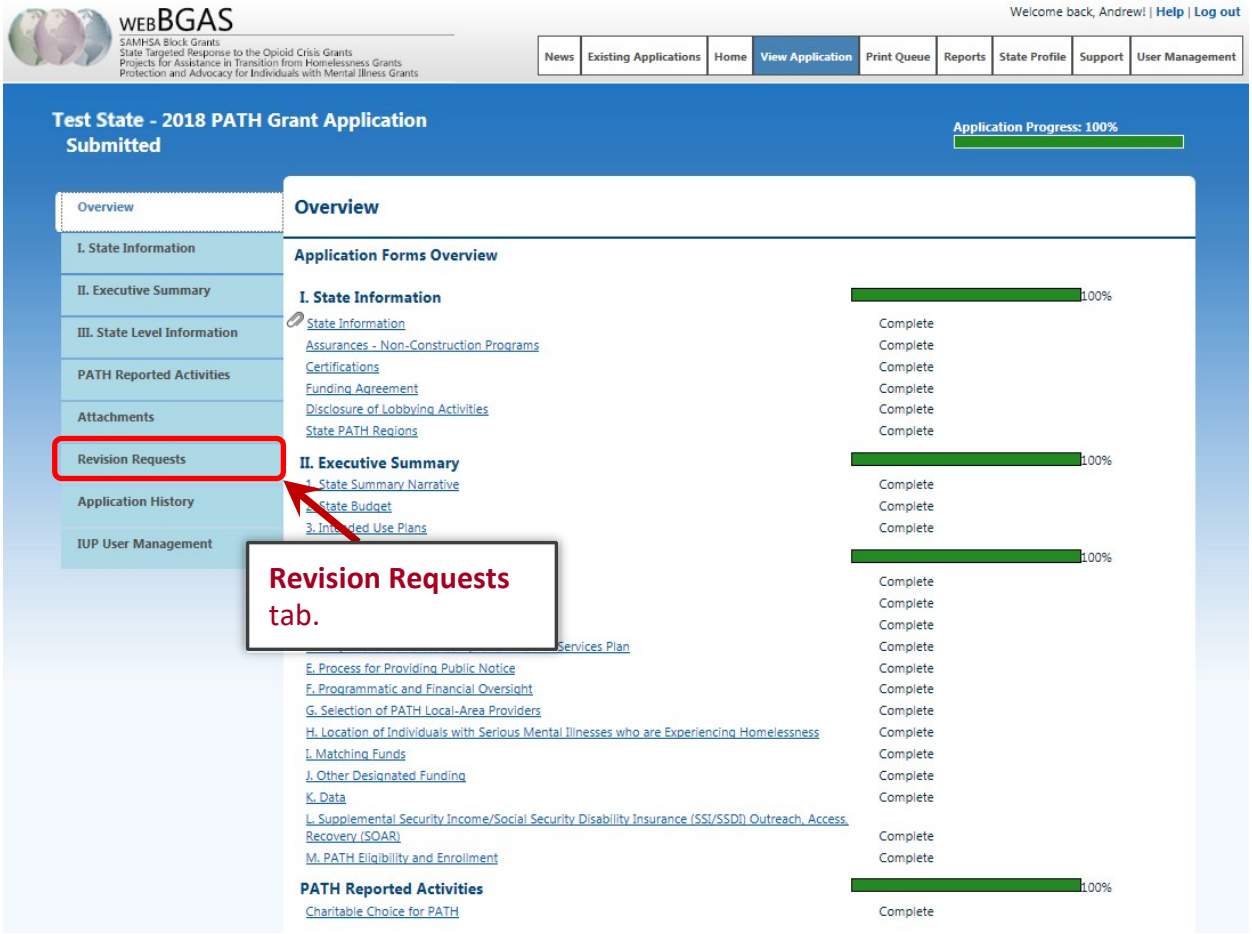


To submit the application to SAMHSA, the PATH Supervisor clicks the **Submit to SAMHSA** button on the Submit to SAMHSA page. This will lock the application and electronically submit it to SAMHSA unless validation warning messages are generated.

The PATH Supervisor, Coordinator, and Alternate Coordinator at your state/territory will receive an email indicating that the application has been submitted to SAMHSA.

12. Handling Revision Requests from SAMHSA

After submitting your PATH Grant Application to SAMHSA, they will review it. During their review, SAMHSA can add revision requests to the application to any of the forms you have filled out. Revision requests usually come with a description about why they have requested you to revise a certain section. To view SAMHSA's revision requests, click on the newly-appearing **Revision Request** tab on the left side navigation menu.

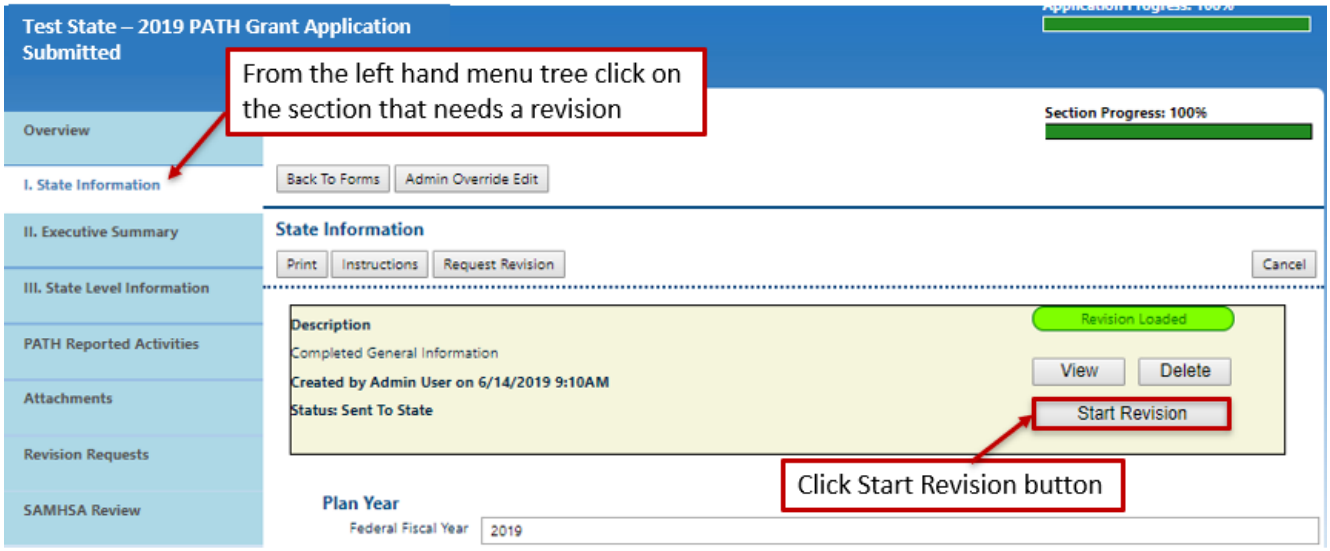


HELPFUL HINT:

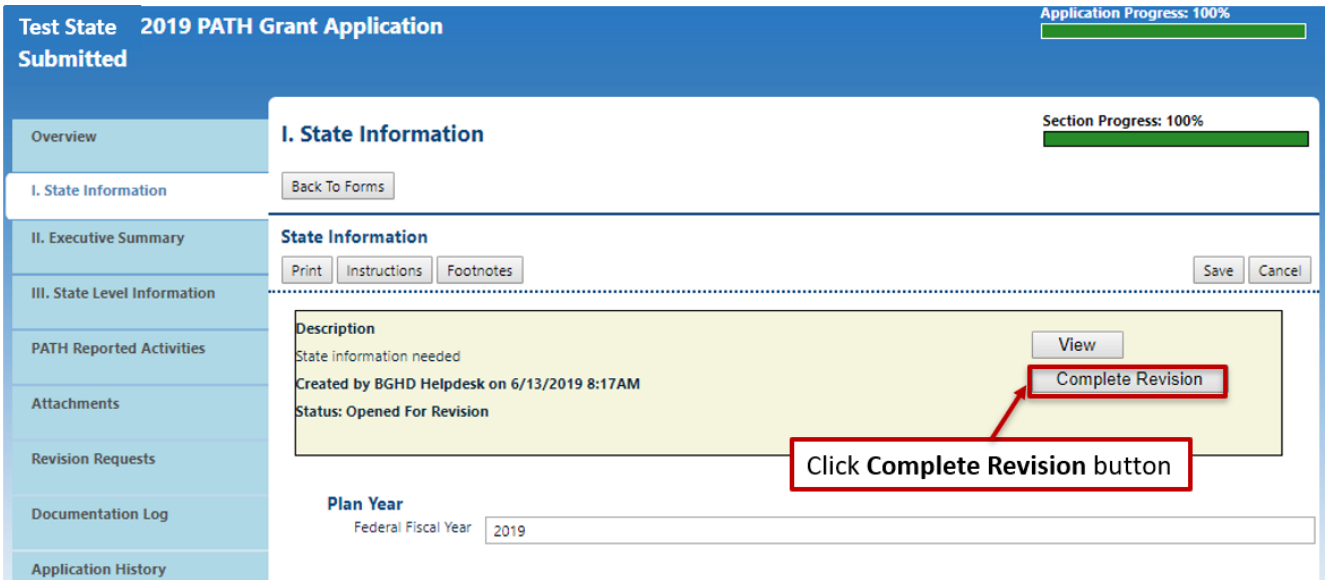
When a green box appears, it indicates that the information is being updated. The box will disappear once the update is complete.

Accessing Revision Requests from the Form

Revision Requests can be accessed directly from the form. Select the form that you have been requested to revise from the left-hand menu. The Revision Request will identify the description of the revision, who created the revision, and the status of the revision. Click on the Start Revision button to make the form editable.



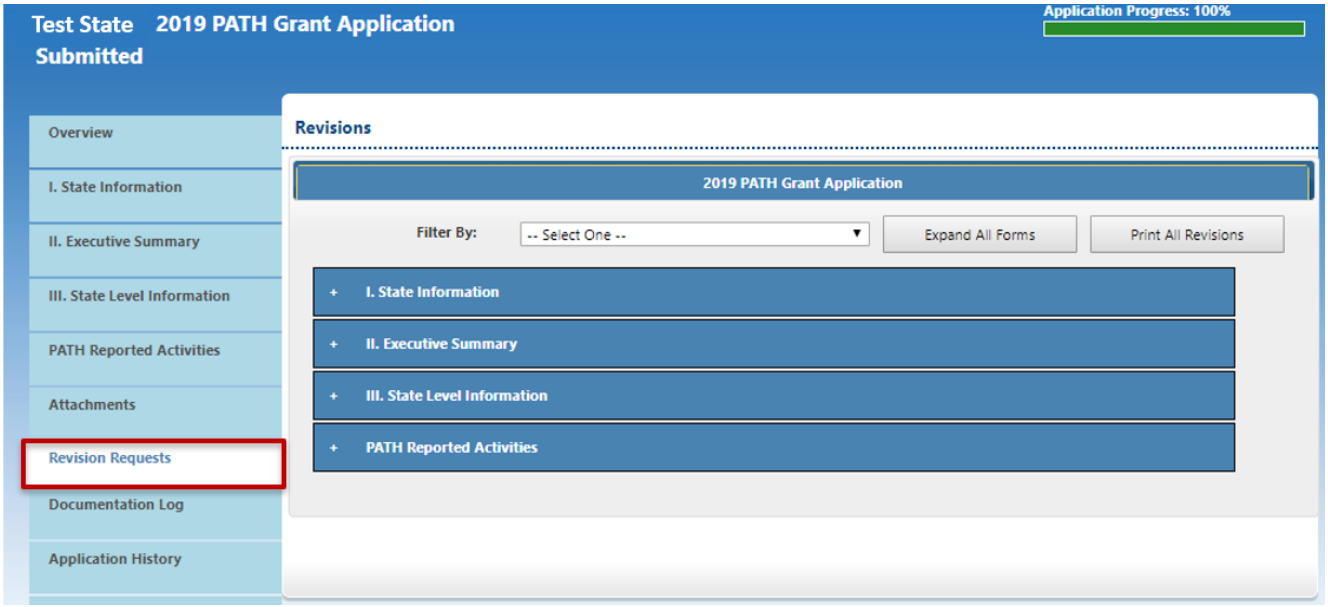
When the Revision Request has been completed, click on the Complete Revision button. Once the edited information has been loaded, the request will disappear from the screen.



SAMHSA will review the revision and approve or may make additional revision requests.

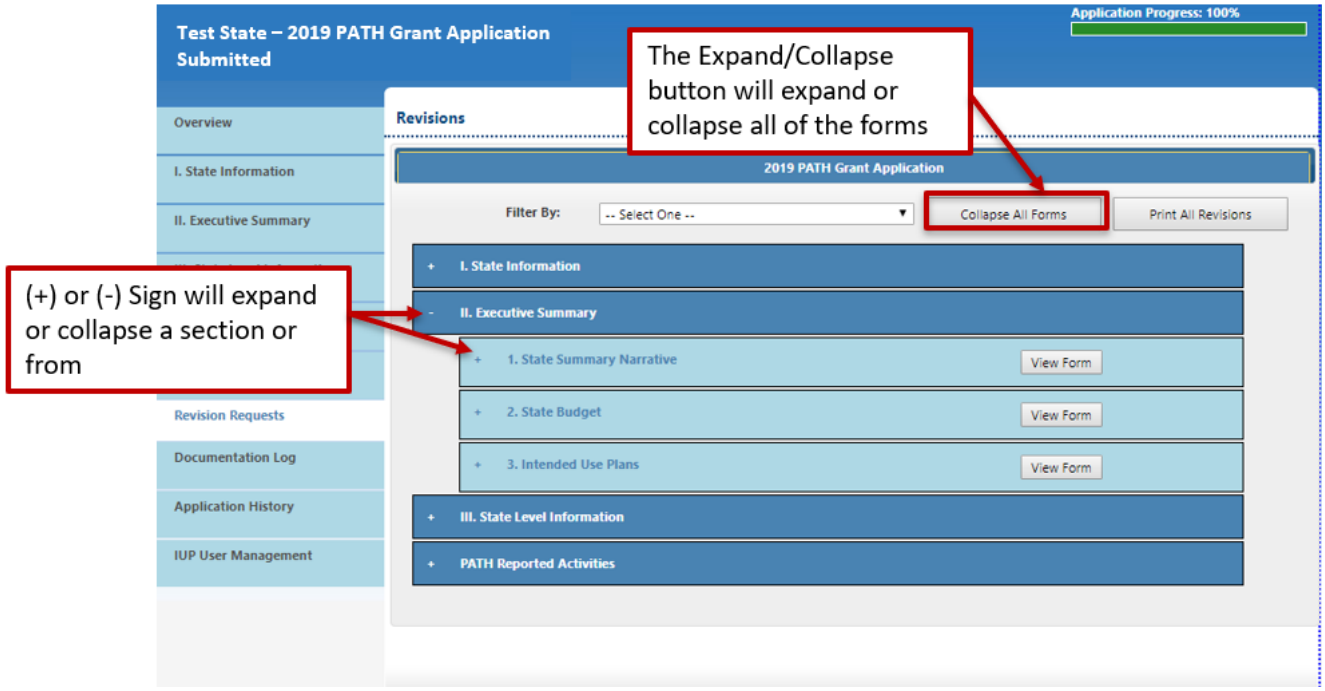
Accessing Revision Requests from the Revision Requests Tab

Revision Requests can be accessed directly from within the application by selecting the Revision Requests tab on the left-hand menu tree.



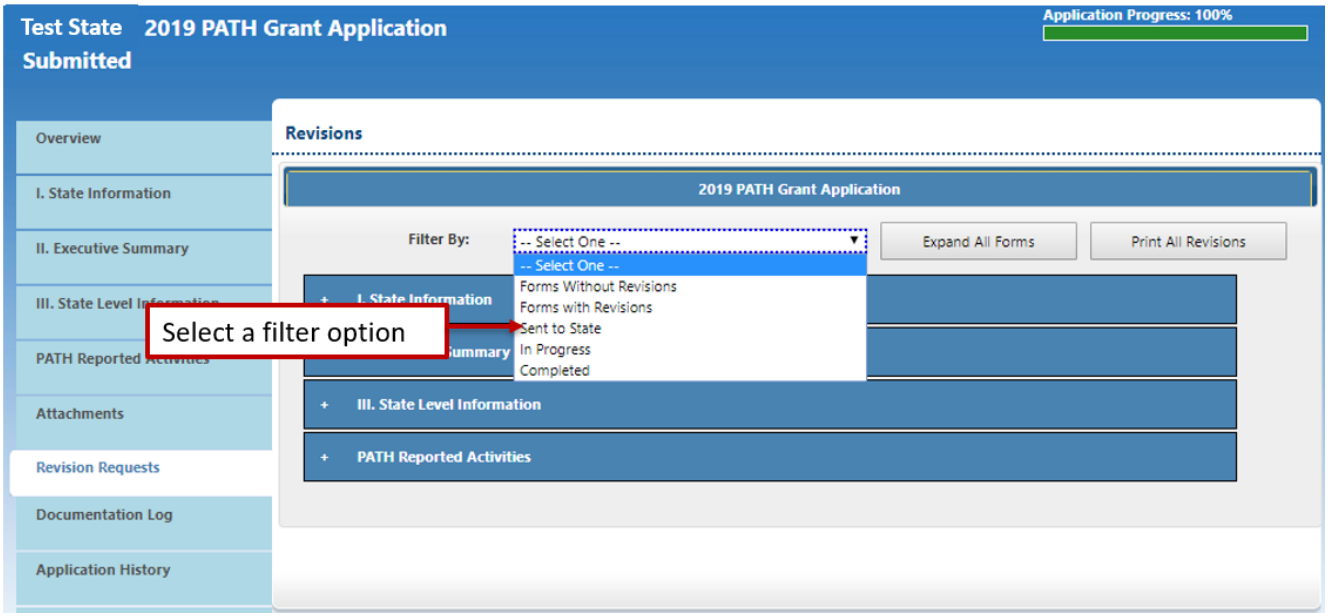
Collapsible Sections

Clicking the plus (+) sign next to any section of the form will expand only that section. Clicking the minus (-) sign next to any expanded section will collapse the form back into its original format. The Collapse All Forms button will also allow the form to collapse to its original format.



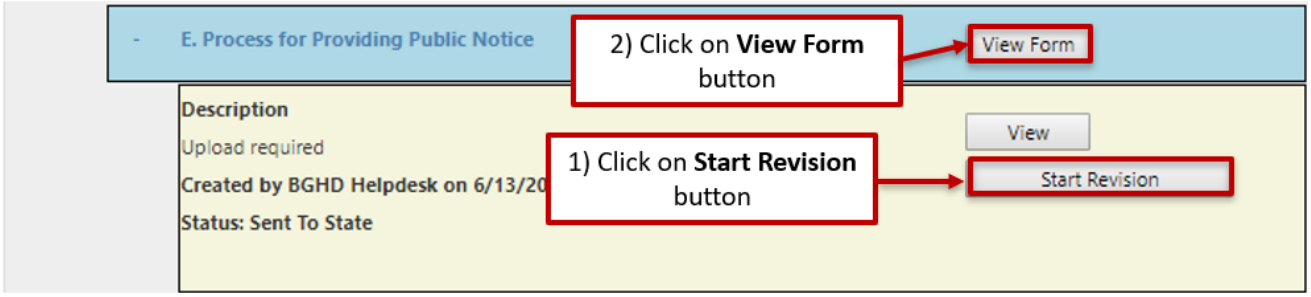
Filtering through Revision Requests

Selecting the Filter By: option allows you to search for forms with or without revisions. You can also search by revisions that have been sent to the state, revisions that are in progress, and/or by revisions that have been completed



Starting a Revision

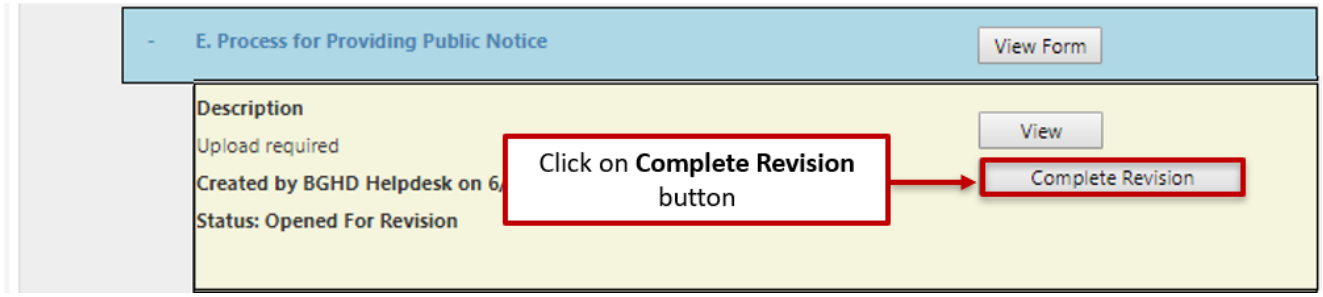
To begin your revision, select the Start Revision button on the form.

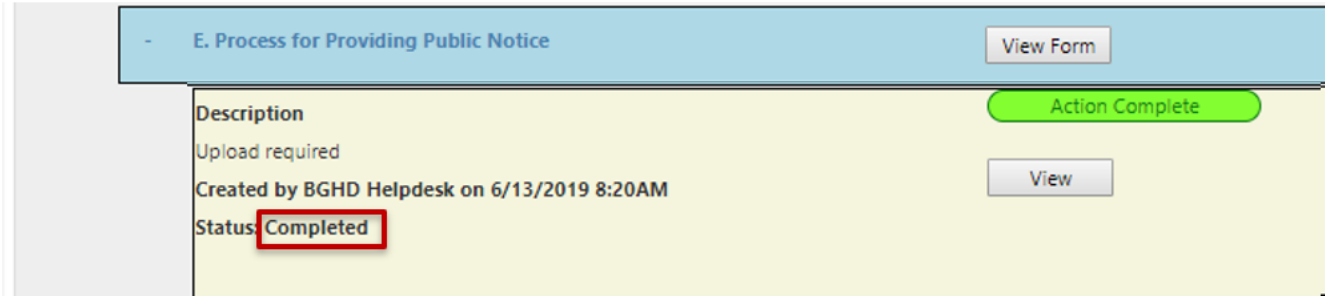


After you select the Start Revision button, click the View Form button. This opens the editable form on a separate tab. You can now complete the requested revisions. Once finished, save the updates made to the section by selecting the Save button and closing the tab. This will take you back to the Revision Request screen.

Completing a Revision

After you have updated the sections of the revision that are required, select the Complete Revision button. The Complete Revision button will then disappear, and the status will also change to Completed. This signals that the revision has been completed.



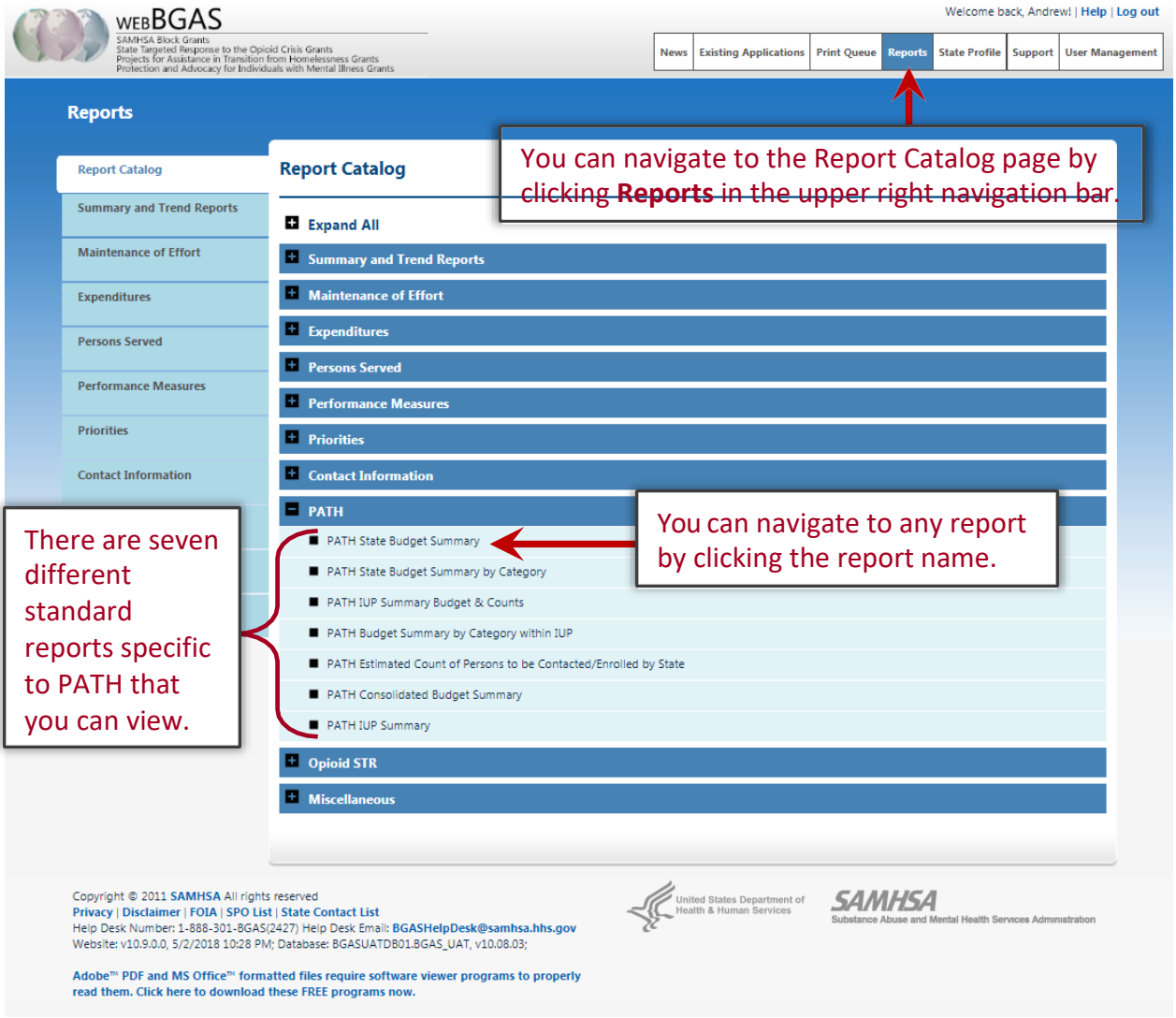


SAMHSA can also send a revision request for a specific IUP. Once you start the revision request, the IUP's budget, description, and profile are unlocked for both the state user and IUP user.

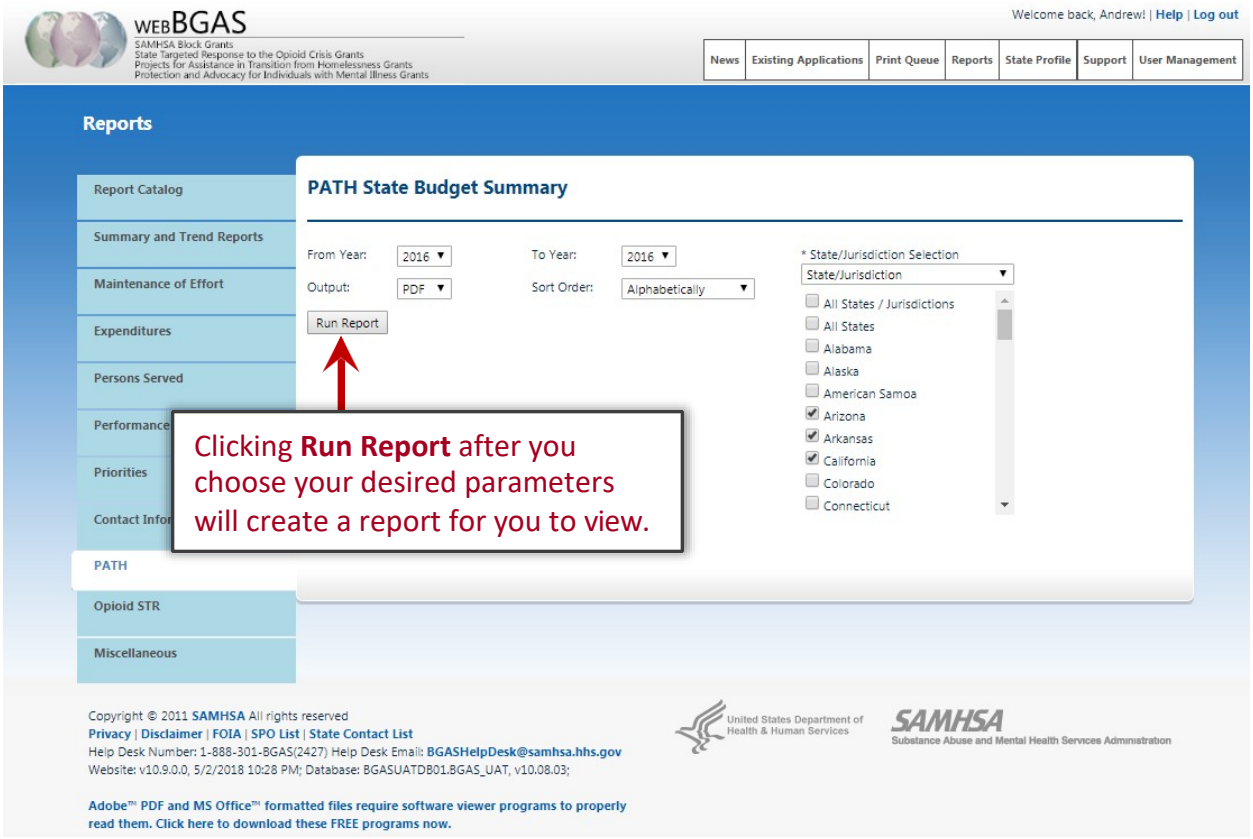
Note: The IUP user does not receive a notification of the revision request. You will need to directly contact the IUP user about any revisions to their application.

13. Standard Reports

A key feature of WebBGAS site is the report catalog which contains standard reports for specific sections of the Block Grant application. These reports allow users to easily access data from their current and previous applications and compare it to other States and Jurisdictions or regions.



The example below shows how to run one of the PATH Reports, titled “PATH State Budget Summary”. Clicking on the “PATH State Budget Summary” will take you to the report’s parameter page which is shown in the next screenshot.



Each standard report gives you some options on the type of data to include, how the report should be sorted, and to what format the report will output. The options available will depend on the report. For the "PATH State Budget Summary" report you can select:

1) **General Options**

   a. **From Year:** The first year of data in the report. The year "2017" is selected in the screenshot.

   b. **To Year:** The last year of data in the report. The year "2018" is selected in the screenshot. When the report is run data for the years 2017 and 2018 will be included.

   c. **Output:** The report can be shown on the website or downloaded as a PDF file or Excel file. "PDF" is selected in the screenshot.

   d. **Sort Order:** The order in which the States/Jurisdictions are listed in the report. The options are Alphabetically, Region #, and State-Jurisdictions. The "Alphabetically" is selected in the screenshot.

2) **State/Jurisdiction Selection:** All States/Jurisdictions that are checked will be listed individually in the report. You can also select States/Jurisdictions by region by clicking the dropdown box and changing it from "State/Jurisdiction" to "Region." The default for these reports will be your state(s)/jurisdiction(s).

3) **Run Report button:** Once you have selected what to include in the report click the "Run Report" button to generate the report.

PATH State Budget Summary

Application Year: 2016

State/Jurisdiction Selection: AZ, AR, CA

State/ Jurisdiction	HHS Region	Application Year	Federal Funds	Matched Dollars	Total	Federal Allocation	Required Match	Total
Arizona	9	2016	$1,295,976	$449,992	$1,745,968	$1,349,975	$449,992	$1,799,967
Arkansas	6	2016	$304,097	$101,366	$405,463	$304,097	$101,366	$405,463
California	9	2016	$8,760,322	$3,616,489	$12,376,811	$8,817,598	$2,939,199	$11,756,797
Selected States/Jurisdictions		2016	$10,360,395	$4,167,847	$14,528,242	$10,471,670	$3,490,557	$13,962,227
All States/Jurisdictions~		2016	$63,344,228	$37,220,802	$100,565,030	$61,576,502	$20,475,501	$82,052,003

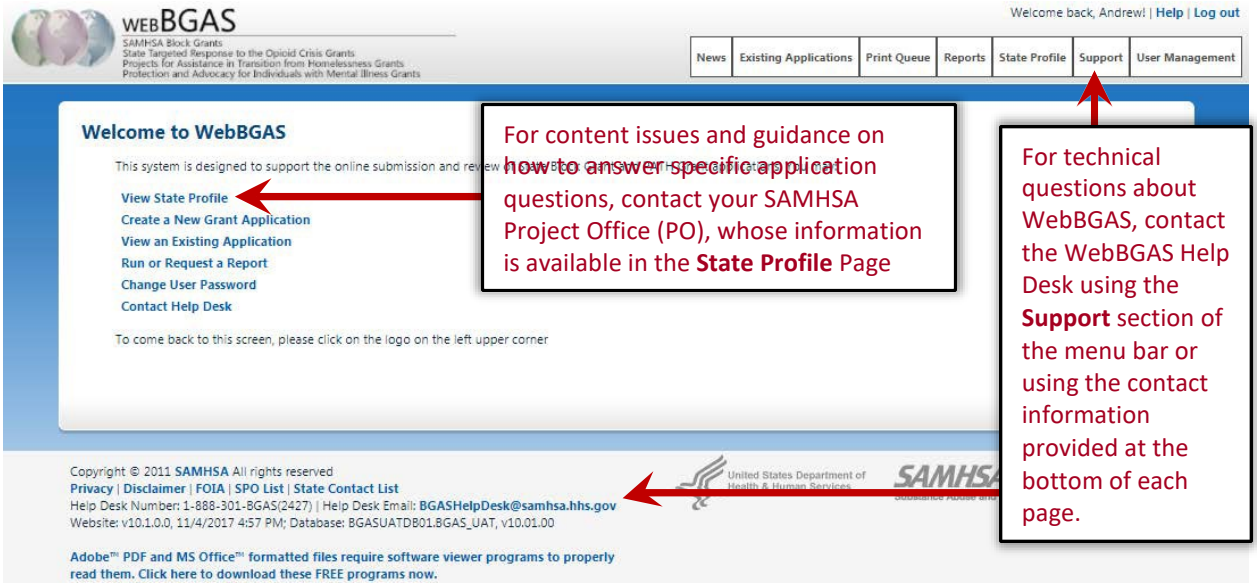
Source: 2016 PATH Grant Application - 2. State Budget

The following jurisdictions are not eligible for path funds : MH, FM, PW, RL

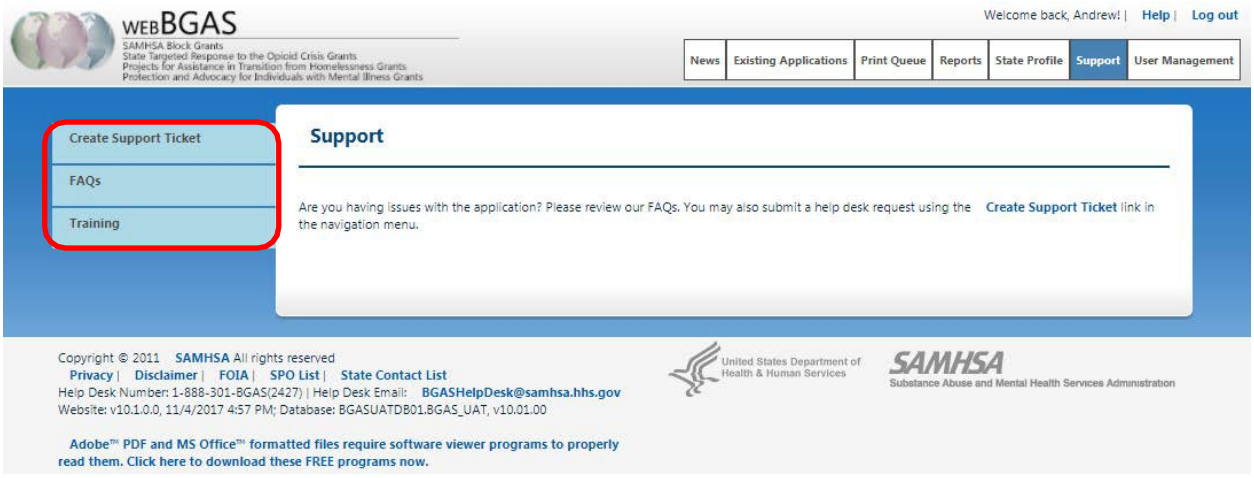
If you have questions about the reports, please contact the WebBGAS Help Desk which is described in the next section.

14. Getting Help within the WebBGAS System

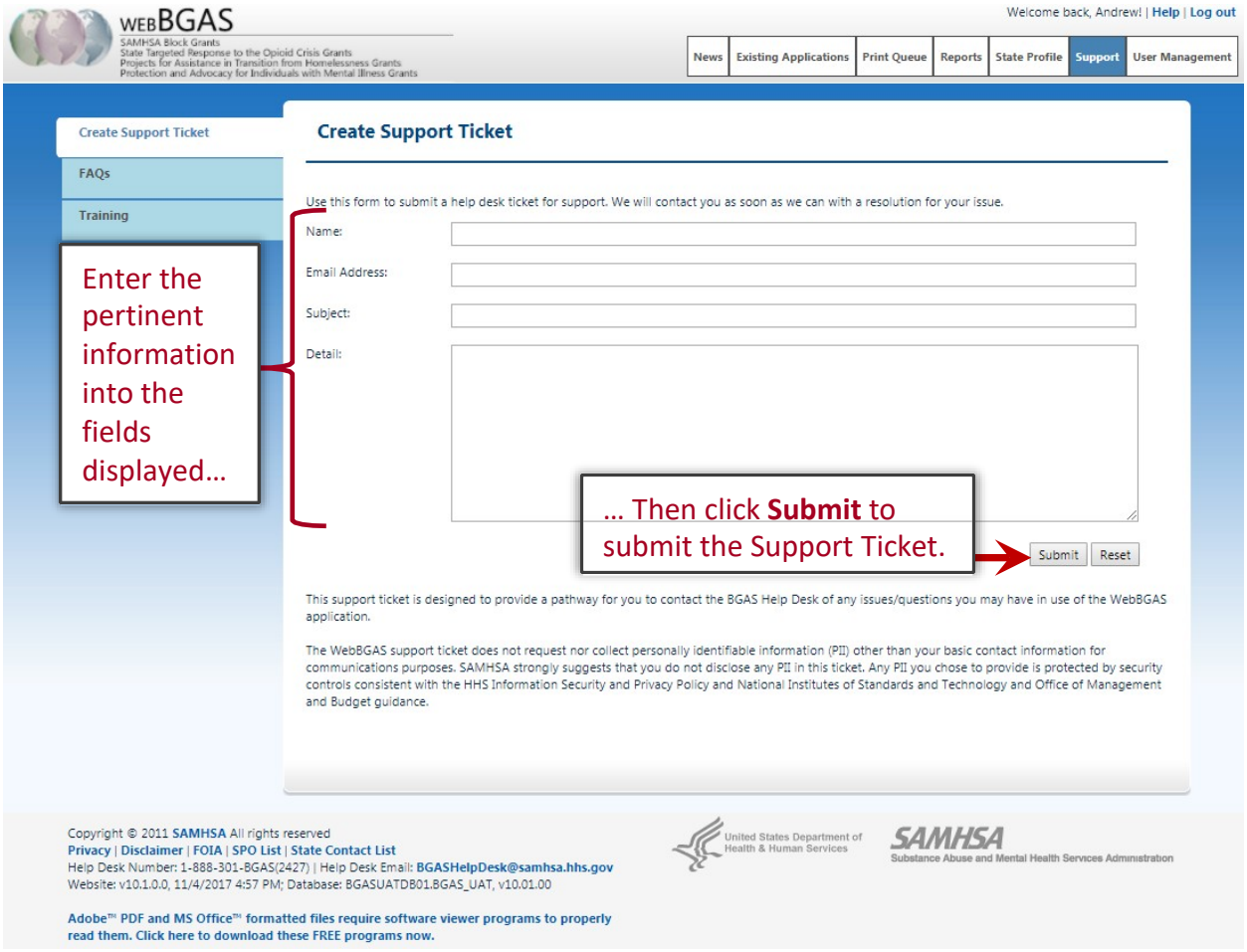
To get help with WebBGAS, you can click **Support** in the menu bar to access the Support section of the system or you can contact the WebBGAS Help Desk directly via the toll-free number and email address provided at the bottom of the Welcome page.



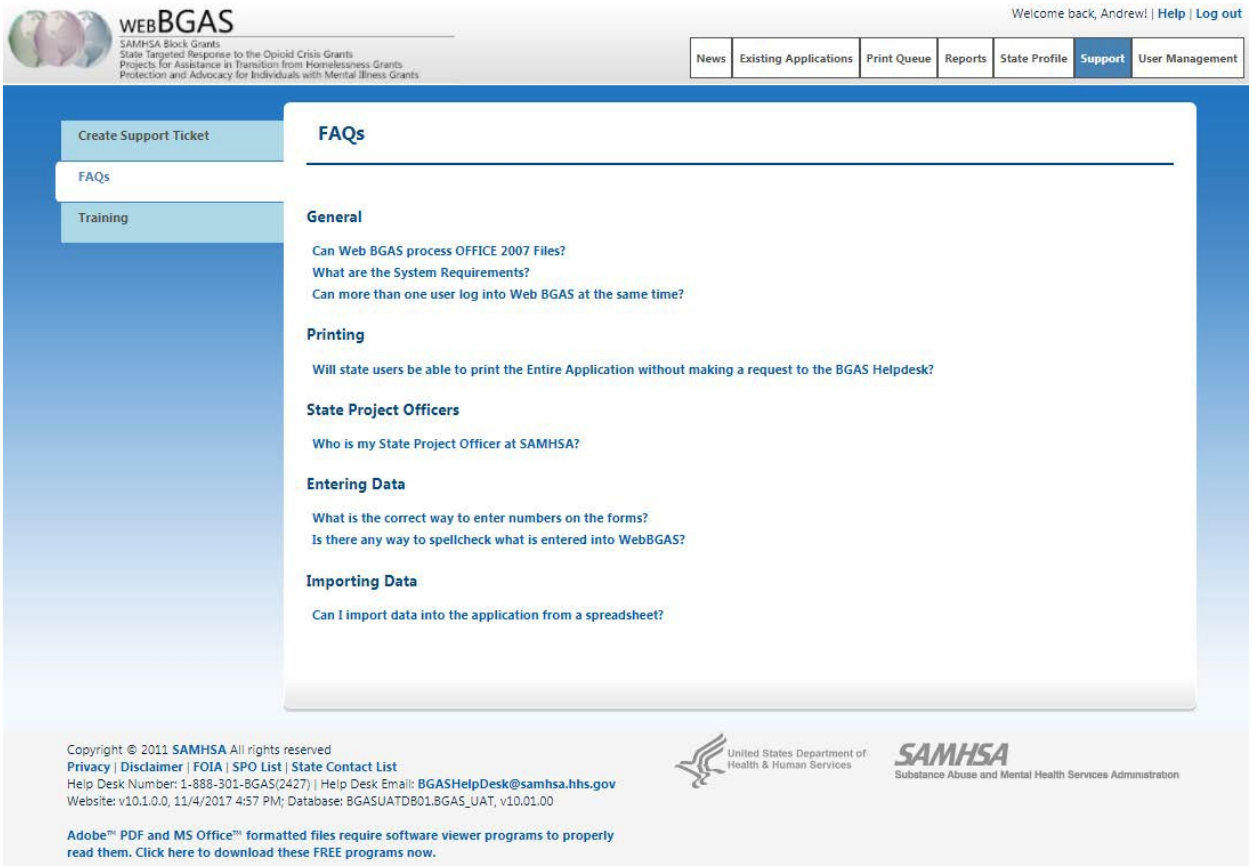
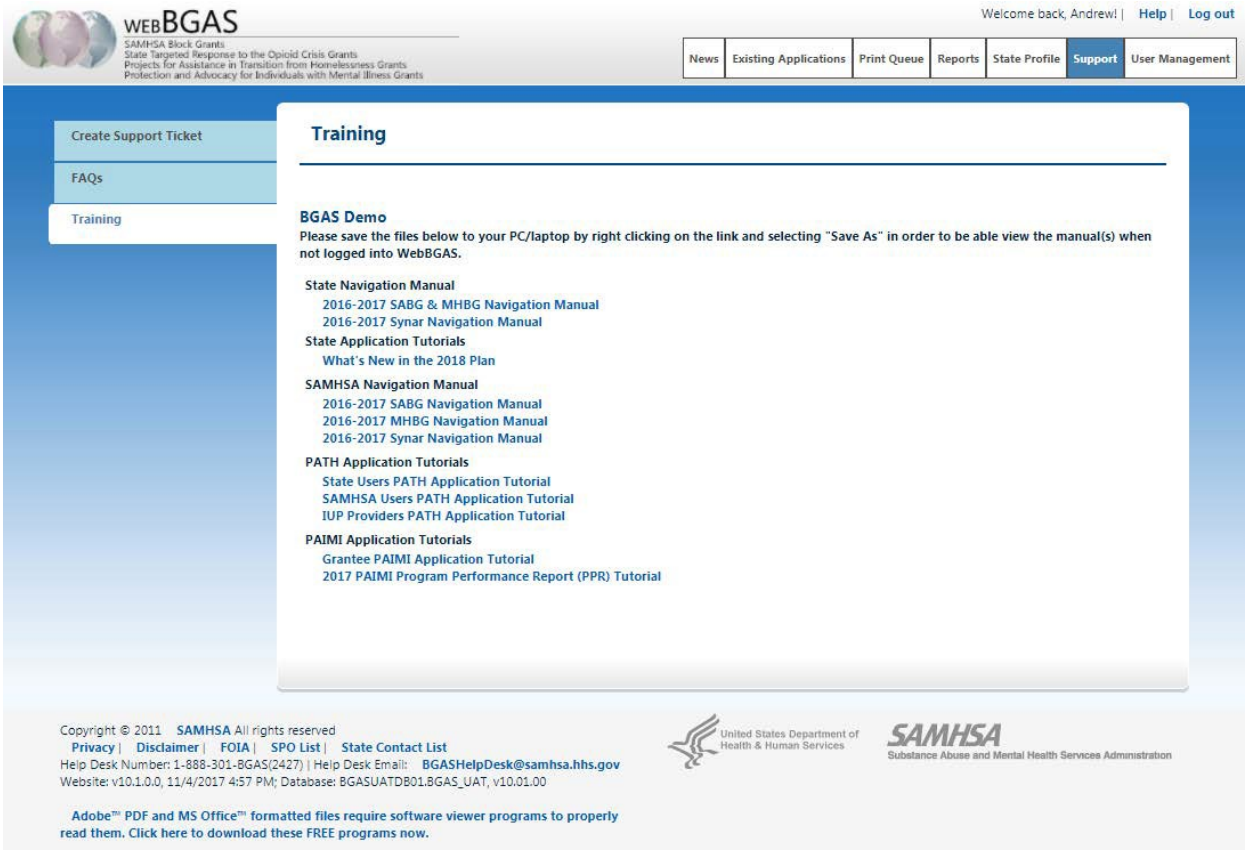
The Support section of WebBGAS allows you to create a support ticket to submit to the Help Desk and provides access to materials such as frequently asked questions (FAQs) and posted training materials. You can access these sections of the Support page by clicking the tabs in the left navigation pane (circled in red below).



Clicking **Create Support Ticket** directs you to the web page shown below. You can enter your information and a detailed explanation of the problem and then click **Submit**. The support ticket will be sent directly to the WebBGAS Help Desk staff who will respond to your question in a timely manner. You will also receive an email confirming the ticket has been submitted to the helpdesk.



Clicking **FAQs** directs you to a list of questions that are frequently asked by users of the WebBGAS. If you see a question listed you want answered, simply click on that question and the answer will be displayed.



Any training materials that have been posted to the system will be found in the Training section. Documents such as this navigation manual as well as video recordings of online demonstrations can be found here. Just click the corresponding link to open them.