

# Indiana Opioid Settlement Fund Reporting Tool Instruction Manual

Field:	Details:
Program Name	Indiana Opioid Settlement Fund
Manual Title	Indiana Opioid Settlement Fund Reporting Tool Instruction Manual
Date	8/15/2024
Version	1.3
Description of Change	Revised manual to reflect the updated reporting form
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Reviewed By	Stephanie Carter



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# **Purpose**

This Standard Operating Procedure (SOP) is designed to assist local units of government with completing the annual opioid settlement reporting form mandated by the Indiana General Assembly. This document aims to explain the reporting form, clarify submission deadlines, and provide information on how to seek assistance with completing the form.

## Overview

The reporting form requires local units of government to provide contact information and details regarding all opioid settlement funds received and expended. The key purposes of the form include:

#### **Expenditure Plan:**

- Outline the amount of funding received to date.
- Provide information on the elected officials responsible for the spending plan.

#### **Restricted and Unrestricted Funds:**

- Detail the total amount of restricted and unrestricted funds received to date.
- Explain the use of restricted and unrestricted funds.

#### **Expenditure Information:**

• Input expenditure information for restricted and unrestricted funds if funds were expended.

#### **Committee Information:**

- Indicate if a committee was created to determine the spending of opioid settlement funds.
- Explain the make-up of the committee (if applicable).



#### Instructions

This standard operating procedure (SOP) includes step-by-step instructions with screenshots to guide users through the process of filling out the annual report on the use of Opioid Settlement Funds received by the local unit of government.

# **Troubleshooting and Support**

For any questions regarding the reporting form or technical issues, please email all inquiries to <a href="Monoiodsettlement.us@egis-group.com">INopioidsettlement.us@egis-group.com</a>.

You can find a webinar containing step-by-step instructions for submitting a form at in.gov/recovery/settlement.

# Accessing the Form

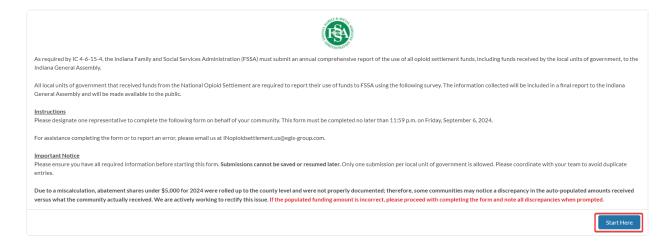
- 1. Compile all necessary information and have it readily available *prior* to starting the form.
  - Please note that your progress cannot be saved or returned to after starting the form.
- 2. Navigate to the form using the following website: https://sondhisolutions.my.site.com/opioidsettlementreporting/s/



# Completing the Form

### Step 1: Start the Reporting Form

1. Click "Start Here" to begin the form.

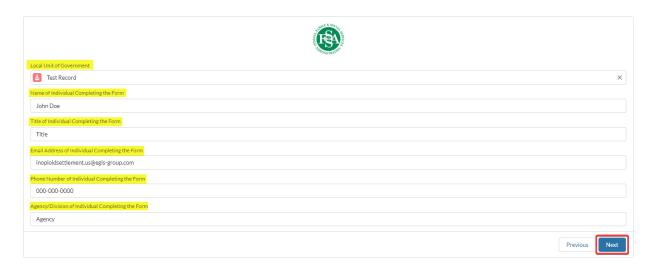


## Step 2: Identify the Individual Completing the Reporting Form

- 1. Local Unit of Government
  - Search and select your Local Unit of Government name from the dropdown.
- 2. Name of Individual Completing the Form
  - o Enter the name of the individual completing the reporting form.
- 3. Title of Individual Completing the Form
  - Enter the title of the individual completing the reporting form (i.e., clerk treasurer, auditor, etc.)
- 4. Email Address of Individual Completing the Form
  - o Enter the email address of the individual completing the form.
- 5. Phone Number of Individual Completing the Form
  - o Enter the phone number of the individual completing the form.



- 6. Agency/Division of Individual Completing the Form
  - o Enter the Agency or Division associated with the individual completing the form.
- 7. Select "Next" to proceed to the next page.



#### **Step 3: Total Amount of Funding Received to Date**

The Total Amount of Funding Received to Date is a pre-populated figure based on the Local Unit of Government Name identified within step 2.

The Reporting Period for this year is August 1, 2023-June 30, 2024.

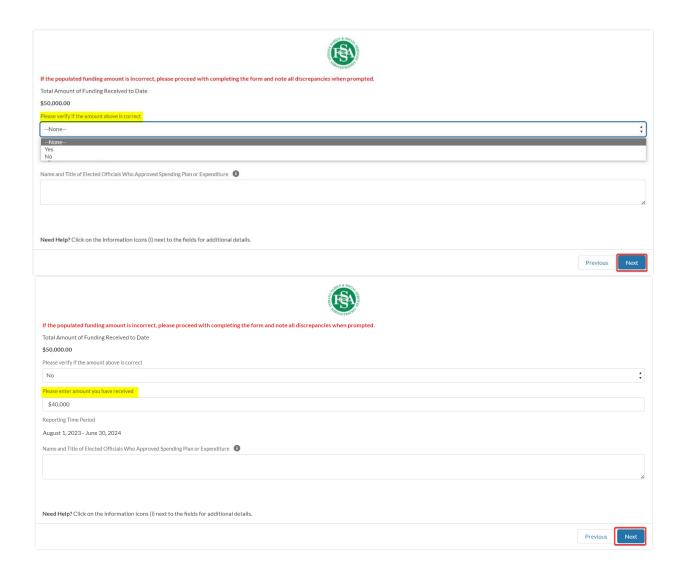
- 1. Please Verify if the amount is correct (Select one: Yes or No)
  - YES: Select this option if the total amount of funding received to date on the reporting form is correct
  - NO: Select this option if the total amount of funding received to date on the reporting form is incorrect
    - o If you select "NO", please enter the amount you have received



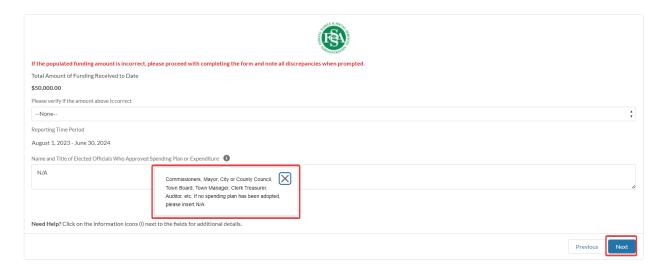
- 2. Name and Title of Elected Officials Who Approved Spending Plan or Expenditure
  - o Enter the name and title of the elected officials who approved the spending plan or expenditure (Commissioners, Mayor, City or County Council, Town Board, Town Manager, Clerk Treasurer, Auditor, etc. If no spending plan has been adopted, please insert N/A).
- 3. Select "Next" to proceed to the next page.











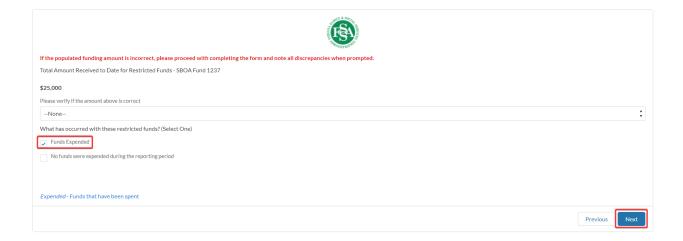
**Note:** Information Icons are located within the form to provide additional information.

## **Step 4: Total Amount Received to Date for Restricted Funds**

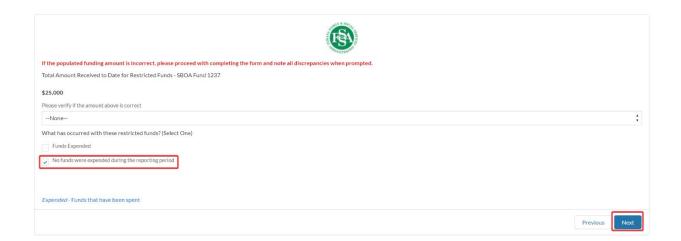
The Total Amount Received to Date for Restricted Funds-SBOA Fund 1237 is a prepopulated figure based on the Local Unit of Government Name identified within step 2.

- 1. Please Verify if the amount is correct (Select one: Yes or No)
  - YES: Select this option if the total amount of funding received to date on the reporting form is correct
  - NO: Select this option if the total amount of funding received to date on the reporting form is incorrect
    - o If you select "NO", please enter the amount you have received
- What has occurred with these restricted funds? (Select One: Funds Expended OR No funds were expended during the reporting period)
  - Funds Expended: Select this option if funds were spent during the reporting period. The <u>Expenditure Information</u> reporting page will populate if this is selected (Step 5).





- No funds were expended during the reporting period: Select this option if the local unit of government did not spend or receive restricted funds. The <u>Unrestricted Funds</u> reporting page will populate if this is selected.
- 3. Select "Next" to proceed to the next page.



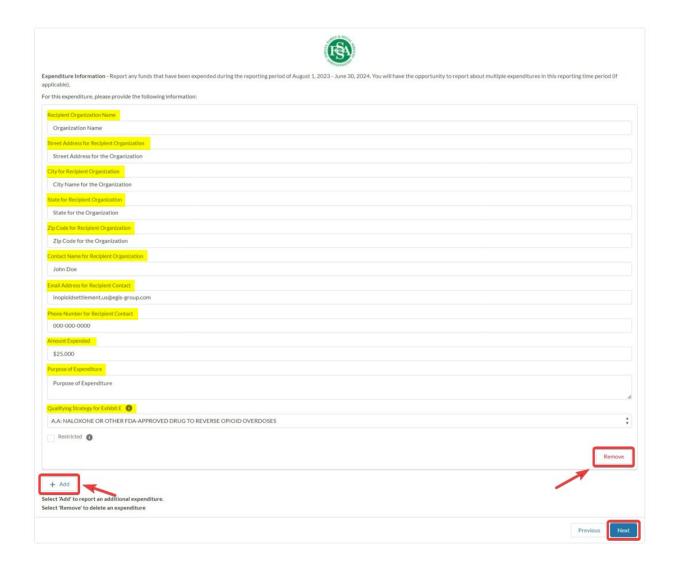


#### **Step 5: Restricted Funds Expenditure Information**

Report any funds that have been expended during the reporting period. If funds were NOT expended for Restricted Funds, this page will NOT populate. Proceed to Step 6.

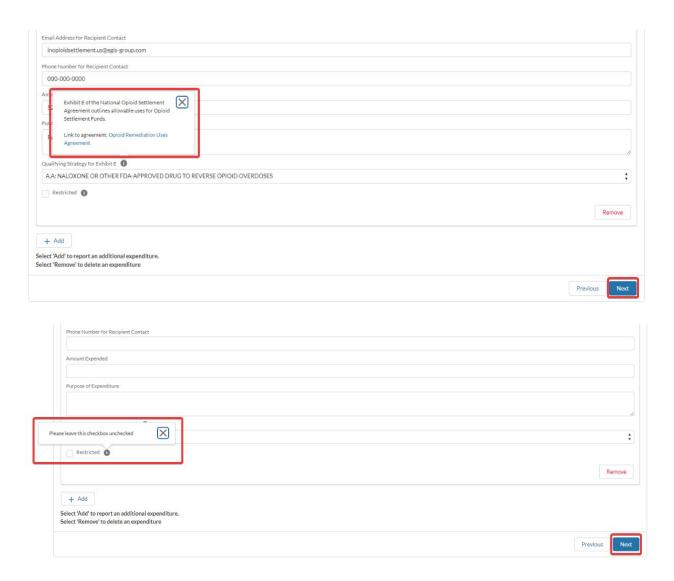
- 1. Recipient Organization Name
  - o Enter the name of the organization.
- 2. Street Address for Recipient Organization
  - o Enter the street name of the organization.
- 3. City for Recipient Organization
  - Enter the city for the organization.
- 4. State for Recipient Organization
  - Enter the state for the organization.
- 5. Zip Code for Recipient Organization
  - Enter the zip code for the organization.
- 6. Contact Name for Recipient Organization
  - o Enter the contact name for the organization.
- 7. Email Address for Recipient Contact
  - o Enter the email address for the organization.
- 8. Phone Number for Recipient Contact
  - Enter the phone number for the organization.
- 9. Amount Expended
  - o Enter the amount spent during this reporting period.
- 10. Purpose of Expenditure
  - o Enter the purpose for how the funds were expended.
- 11. Qualifying Strategy for Exhibit E
  - Select which qualifying strategy for Exhibit E the funds were expended.
- 12. If you have additional expenditures, select "Add" and enter the additional expenditures.
- 13. If you do not have additional expenditures, select "Next" to proceed to the next page.





Note: To remove an expenditure, select "Remove."





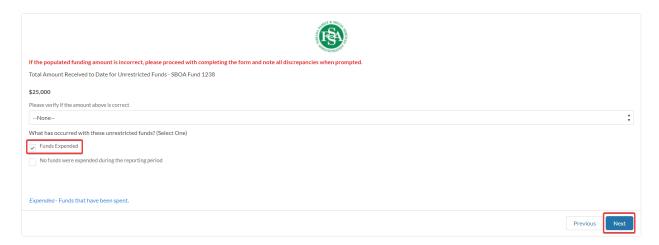
**Note:** Information Icons are located within the form to provide additional information.



#### Step 6: Total Amount Received to Date for <u>Unrestricted Funds</u>

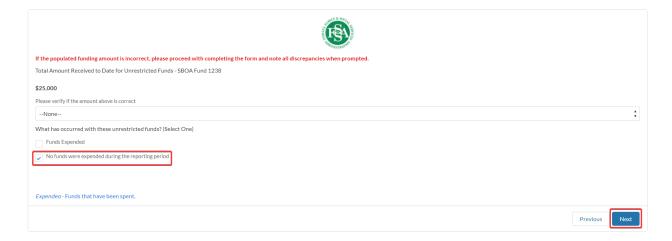
The Total Amount Received to Date for Unrestricted Funds-SBOA Fund 1237 is a prepopulated figure based on the Local Unit of Government Name identified within step 2.

- 1. Please Verify if the amount is correct (Select one: Yes or No)
  - YES: Select this option if the total amount of funding received to date on the reporting form is correct
  - NO: Select this option if the total amount of funding received to date on the reporting form is incorrect
    - o If you select t "NO", please enter the amount you have received
- 2. What has occurred with these unrestricted funds? (Select One: Amount Expended OR No funds were expended during the reporting period)
  - Funds Expended: Select this option if funds were spent during the reporting period. The <u>Expenditure Information</u> reporting page will populate if this is selected.



 No funds were expended during the reporting period: Select this option if the local unit of government did not spend or receive restricted funds.





3. Select "Next" to proceed to the next page.

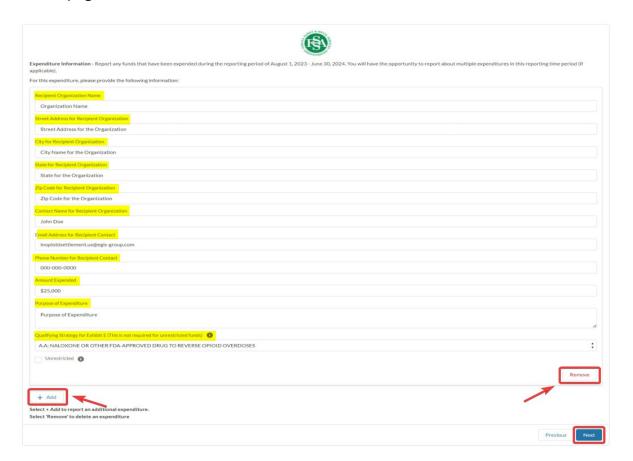
## **Step 7: Unrestricted Funds Expenditure Information**

Report any funds that have been expended during the reporting period. If funds were NOT expended for Unrestricted Funds, this page will NOT populate. Proceed to Step 9.

- 1. Recipient Organization Name
  - o Enter the name of the organization.
- 2. Street Address for Recipient Organization
  - o Enter the street name of the organization.
- 3. City for Recipient Organization
  - o Enter the city for the organization.
- 4. State for Recipient Organization
  - Enter the state for the organization.
- 5. Zip Code for Recipient Organization
  - Enter the zip code for the organization.
- 6. Contact Name for Recipient Organization
  - o Enter the contact's name for the organization.
- 7. Email Address for Recipient Contact
  - o Enter the email address for the organization.
- 8. Phone Number for Recipient Contact



- o Enter the phone number for the organization.
- 9. Amount Expended
  - o Enter the amount spent during this reporting period.
- 10. Purpose of Expenditure
  - o Enter the purpose for how the funds were expended.
- 11. Qualifying Strategy for Exhibit E (if applicable)
  - o Select which qualifying strategy for Exhibit E the funds were expended.
- 12. If you have additional expenditures, select "Add" and enter the additional expenditures.
- 13. If you do not have additional expenditures, select "Next" to proceed to the next page.



Note: To remove an expenditure, select "Remove."



#### **Step 8: Community Committee Information**

- 1. Has your community created a committee to determine how to spend opioid settlement funds? (Select one: Yes or No)
  - o **YES:** Select this option if your community has created a committee.
  - o **NO:** Select this option if your community has not created a committee.



- 2. If your community has created a committee, describe the make-up of the committee. (*Enter the names and titles of the individuals*)
- 3. Select "Next" to proceed to the next page.



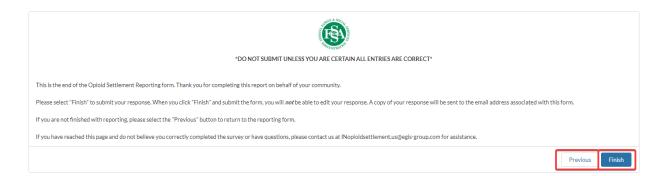
#### **Step 9: Form Submission**

Select "Finish" to submit your response. When you click "Finish" and submit the form, you will NOT be able to edit your response. A copy of your response will be sent to the email address associated with this form.

If you are not finished with reporting, please select the "Previous" button to return to the reporting form.



If you have reached this page and do not believe you correctly completed the survey or have questions, please contact us at <a href="Monoidsettlement.us@egis-group.com">Monoidsettlement.us@egis-group.com</a> for assistance.



# Conclusion

The completion of the annual reporting form mandated by the Indiana General Assembly is crucial for maintaining transparency and accountability in the use of Opioid Settlement Funds. This Standard Operating Procedure (SOP) has been designed to support local units of government in this process by providing clear explanations, outlining submission deadlines, and offering assistance resources.

By adhering to the guidelines provided in this SOP, local units of government can ensure accurate and thorough reporting of:

- The total amount of funding received to date and the elected officials responsible for the spending plan.
- The detailed use of restricted funds (SBOA-1237) and unrestricted funds (SBOA-1238).
- Expenditure information for the reporting period.
- Information regarding the formation and decisions of any committees involved in the allocation of opioid settlement funds.



We appreciate the effort and diligence of all local units of government in completing this annual report. Should any issues or questions arise during the process, please refer to the provided step-by-step instructions and screenshots or contact our support team at <a href="Monoidsettlement.us@egis-group.com">Monoidsettlement.us@egis-group.com</a> for assistance.

Your commitment to this reporting process is vital in ensuring the responsible management of opioid settlement funds, contributing to the betterment of our communities. Thank you for your cooperation and dedication.