

## **Appendix G**

### **Community Service Agreement (CSA) System**

IDHS and DoIT have developed an automated version of the GATA Uniform Budget Template and Fixed Rate Budget Template in the CSA Tracking System. This new automated GATA Budget allows organizations to submit and IDHS to approve budgets electronically. Your familiarity with the FY17 and FY18 Uniform Budget Template in MS Excel or as a PDF and the FY17 Fixed Rate Budget Template in MS Word will work to your advantage, as the FY18 web-based budget templates are based on those documents but are more user-friendly. Additionally, there is an instruction manual in the CSA Tracking System to assist you with the completion and submission of the budgets in the CSA Tracking System.

As in FY17, the completed program-specific budgets require approval by your organization's Chief Financial Officer (or equivalent) and Executive Director (or equivalent). Generally, IDHS will not review budgets until they are electronically approved by the CFO and Executive Director and submitted through the CSA Tracking System. In order to give your CFO and Executive Director the permission to approve budgets, IDHS' Office of Contract Administration must recognize their roles. Therefore, your organization must register their roles in the CSA Tracking System.

The process for registering your organization's Executive Director (or equivalent) and Chief Financial Officer (or equivalent) is as follows:

1. Ensure that the Chief Financial Officer (or equivalent) and Executive Director (or equivalent) are registered users in the CSA Tracking System prior to requesting approval rights.
  - a. If CSA Tracking System access is needed, register following the instructions here:  
<http://www.dhs.state.il.us/page.aspx?item=61069>
  - b. If CSA Tracking System access already exists, proceed to Step 2.
2. After the CFO and Executive Director are registered in the CSA, send an email to [DHS.DHSOCA@Illinois.gov](mailto:DHS.DHSOCA@Illinois.gov) requesting access rights to approve budgets. The email request should include the following information:
  - a. The Name and FEIN of the organization;
  - b. The name and job title of the organization's employee requesting the access for the CFO and Executive Director; and
  - c. The name and email address of the CFO (or equivalent) and Executive Director (or equivalent) who will be used to approve budgets for the provider.

No budget approval access will be granted via phone. All requests need to be made via email at [DHS.DHSOCA@Illinois.gov](mailto:DHS.DHSOCA@Illinois.gov). Please note the CSA Tracking System can be accessed using the following web link: <https://grants.dhs.illinois.gov/gpsecure/gtp>