



# GrantSolutions

Grantor Process: Federal Financial Report

September 2019

## Table of Contents

INTRODUCTION	1
FFR Statuses	1
Notifications	1
LOGIN AND NAVIGATION	2
Search and Filter Options	5
Download Search Results	2
Access Reports for a Grant Project	3
REVIEW, RETURN, OR ACCEPT A REPORT	6
Review a Report	7
Return a Report	11
Accept a Report	13

## Introduction

GrantSolutions provides comprehensive management of Federal Financial Reports (FFRs), also referred to as the SF-425, for Grantors and Grant Recipients. Federal Grants staff schedule report cycles and determine due dates. Grant Recipients view, manage, and electronically submit FFRs in GrantSolutions.

FFRs are submitted on a quarterly, semi-annual, or annual basis, as directed by the Federal agency. When required, a final FFR is submitted at the completion of the award agreement. Please refer to the FFR Setup Guide for instructions on configurations.

### FFR STATUSES

FFR statuses change depending on steps taken in the workflow. The FFR statuses are:

- *Not Enabled*: The FFR is not activated for the Grant Project.
- *Not Started*: Grant Recipient has not entered any data in the report.
- *In Progress*: Grant Recipient has entered data in the report but not yet submitted.
- *Submitted*: Grant Recipient has submitted the report to the Grantor.
- *In Review*: Grantor has started the review process.
- *Accepted*: Grantor has approved the FFR.
- *Returned*: Grantor has returned the FFR to the Grant Recipient for edits.
- *Past Due*: The FFR Due Date is in the past and report has not been submitted.

The below table details possible actions based on the workflow status.

Workflow Status	Possible Grantor Actions
<b><i>Not Enabled</i></b>	None
<b><i>Not Started</i></b>	None
<b><i>In Progress</i></b>	View Report, Print, Download (PDF)
<b><i>Submitted</i></b>	Review Report, Print, Download (PDF)
<b><i>In Review</i></b>	Accept or Return Report, Print, Download (PDF)
<b><i>Accepted</i></b>	View Report, Print, Download (PDF)
<b><i>Returned</i></b>	View Report, Print, Download (PDF)
<b><i>Past Due</i></b>	None

**Note:** Available actions are also dependent on a user's GrantSolutions role.

### NOTIFICATIONS

Grantors with the ability to accept FFRs receive an email notification with the list of all FFRs submitted that day.

## Login and Navigation

To log into GrantSolutions and locate an FFR, complete the following steps:

1. In a browser such as Internet Explorer or Google Chrome, navigate to [www.grantsolutions.gov](https://www.grantsolutions.gov) and click the **Login** button.

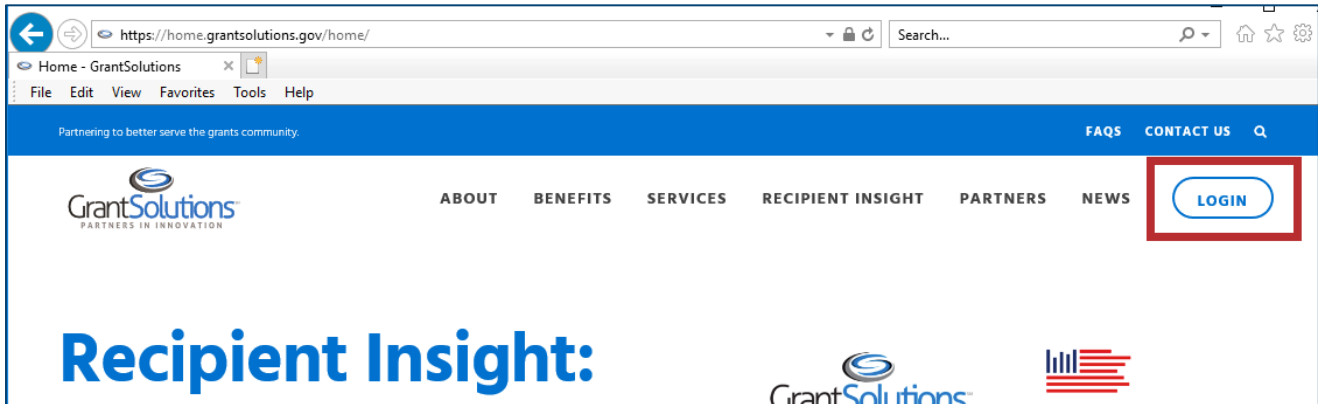


Figure 1: GrantSolutions Home page - Login button

2. The “GrantSolutions Login” screen appears. Log in with your GrantSolutions credentials (username and password or PIV card based on your login method).
3. The “Portal” screen may appear (depending on the Federal Agency). From the menu bar, select **Grants Management > Discretionary**.

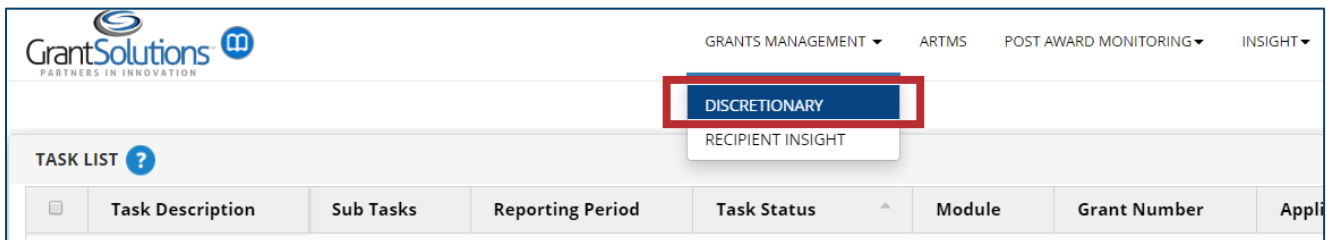


Figure 2: Portal screen - Grants Management > Discretionary menu

- The “Grants List” screen appears. To open an FFR for one grant project, conduct a search. When a Grant Project appears in the results table, click the **blue plus sign** to expand the row.

Program Office	Grant Program	Grant Number	Organization	Project Period3 Start Date	Project Period End Date	Project Status	Actions
LITC Program Office	Low Income Taxpayer Clinics	LITC0355	<a href="#">The Mouse Training Center</a>	05/14/2019	05/13/2021	No Amendments In-Progress	
LITC Program Office	Low Income Taxpayer Clinics	LITC0358	<a href="#">The Mouse Training Center</a>	05/14/2019	05/13/2021	No Amendments In-Progress	

Figure 3: Grants List results table - blue plus sign to expand the row

- From the expanded row’s Action column, click the **FFR** link.

Program Office	Grant Program	Grant Number	Organization	Project Period3 Start Date	Project Period End Date	Project Status	Actions
LITC Program Office	Low Income Taxpayer Clinics	LITC0355	<a href="#">The Mouse Training Center</a>	05/14/2019	05/13/2021	No Amendments In-Progress	<b>FFR</b> <a href="#">Award Summary</a> <a href="#">Progress Reporting</a> <a href="#">Performance Reporting</a> <a href="#">Grant Project Assessment</a> <a href="#">Contact Management</a> <a href="#">View Report Forms</a> <a href="#">Change Project Locale</a> <a href="#">Terms and Conditions</a> <a href="#">Funding Restrictions</a> <a href="#">Manage Project Abstract</a> <a href="#">Closeout by Budget Period</a>

Figure 4: Grants List results - expanded row - FFR link

- The “Manage Reports” screen appears. To return to the “Grants List” click the **Grants Management** link.



Figure 5: Manage Reports screen - Grants Management Link

- From the “Grants List” screen, it is possible to navigate to the “Manage Reports” Search screen. From the menu bar, select **Grants Management > Grantee Reporting > Manage FFR Reporting**.

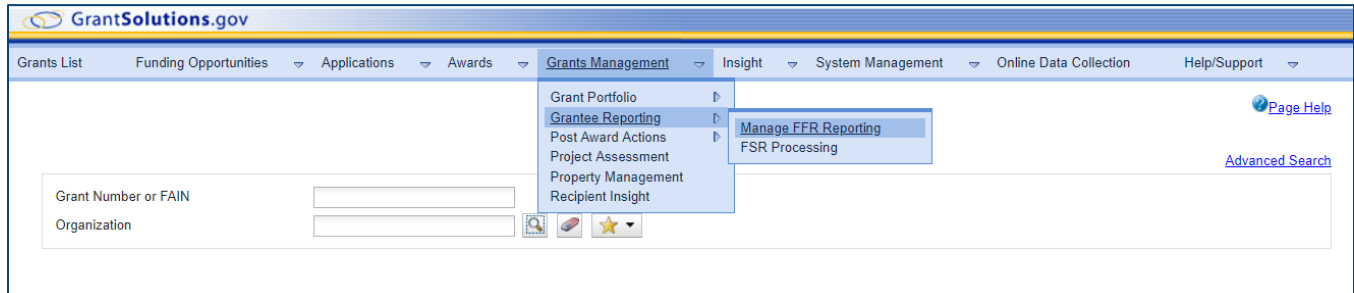


Figure 6: Grants List - Grants Management > Grantee Reporting > Manage FFR Reporting menu

- The “Manage Report” screen appears. To return to the “Grants List”, click the **Grants Management** link located towards the top left of the screen.

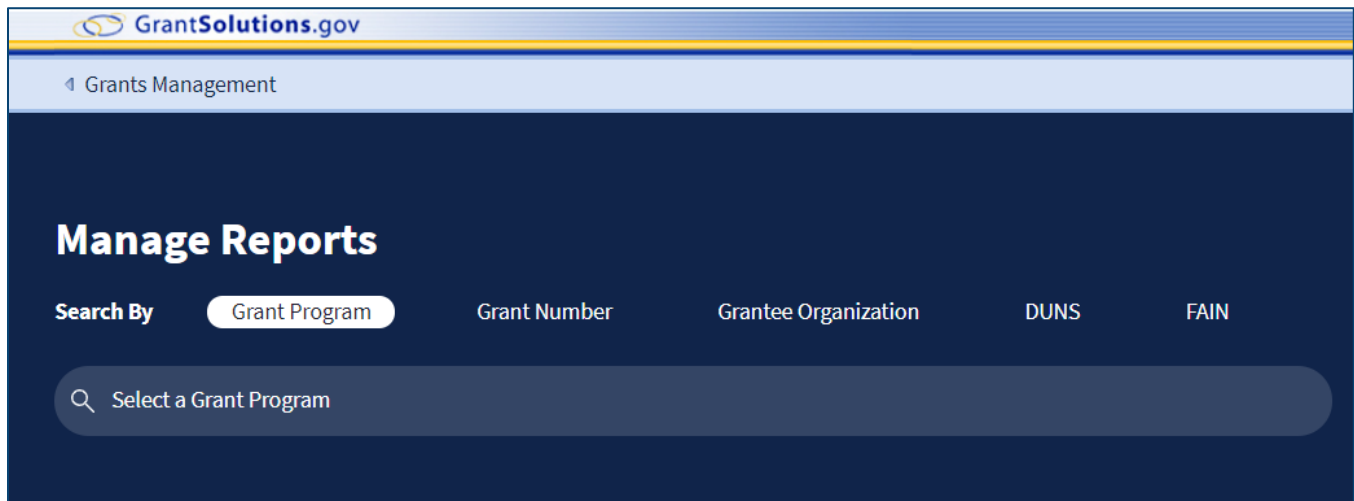


Figure 7: Manage Reports screen

## SEARCH AND FILTER OPTIONS

The “Manage Reports” screen provides five options to use when searching for Grant Projects and FFRs.

- **Grant Program:** Begin typing the Grant Program name. After two letters are entered, a list of Grant Programs appears for selection
- **Grant Number:** Enter a full or partial Grant Number in the Search field. At least three characters are required
- **Grantee Organization:** Enter a full or partial Grant Number in the Search field. At least three characters are required
- **DUNS:** Enter a full or partial DUNS in the Search field. At least three characters are required
- **FAIN:** Enter a full or partial FAIN in the Search field. At least three characters are required

The screenshot shows the 'Manage Reports' section of the GrantSolutions.gov interface. It features a 'Search By' dropdown menu with five options: 'Grant Program', 'Grant Number', 'Grantee Organization', 'DUNS', and 'FAIN'. The 'Grant Program' option is currently selected and highlighted with a red border. Below the dropdown is a search input field with a magnifying glass icon and the placeholder text 'Select a Grant Program'.

Figure 8: Manage Reports screen - Search by options

To perform a search:

1. Select a **Search By** option and then type corresponding text in the **search** field. If needed, press **enter** from the keyboard to activate the search.

This screenshot shows the 'Manage Reports' search interface with a search result displayed. The 'Search By' dropdown is set to 'Grant Program'. The search input field contains the text 'ti', and a red arrow points to it. Below the input field, a dropdown menu shows the search results: 'Low Income Taxpayer Clinics' (highlighted with a red border) and 'AT-TAS.1 Low Income Taxpayer Clinics'. A magnifying glass icon is visible at the bottom right of the search area.

Figure 9: Manage Reports screen - Search section

- The screen refreshes and results appear below the search section. Search results can be filtered by status or timeframe. Select as many filters as needed. Click the Reset Filters link to return the FFR Status and FFR Due filters to the default.

The *FFR Statuses* are as follows:

- All Statuses (Default)
- Not Enabled:
- Not Started
- In Progress
- Returned
- Submitted
- In Review
- Approved

**Tip:** The number of FFRs associated with a status appears next to the status name.

The screenshot shows the 'Manage Reports' interface. At the top, there's a search bar with 'Low Income Taxpayer Clinics' entered. Below the search bar, there's a table of results. The first row is for '13LITC0001' and the second for '13LITC0002'. A dropdown menu for 'FFR Status' is open, showing a list of status options with their respective counts: 'All Statuses (328)', 'Not Enabled', 'Not Started (249)', 'In Progress (14)', 'Returned (6)', 'Submitted (56)', 'In Review (1)', and 'Approved (2)'. A red arrow points to the 'Submitted (56)' option. The 'FFR Due' filter is also visible, set to 'All Due Dates (3...)'. A 'Reset Filters' link is present in the top right corner of the filter area.

Figure 10: Manage Reports screen - FFR Status filter

The *FFR Due* timeframes are as follows:

- All Due Dates: Default
- Today
- One Week
- One Month
- Upcoming
- Past Due
- Custom Range

The screenshot shows the 'Manage Reports' interface. At the top, there's a search bar with 'Low Income Taxpayer Clinics' and a 'Program Report Settings' link. Below the search bar, there's a table of results. The table has columns for 'GRANT PROGRAM', 'GRANTEE ORGANIZATION', 'DUNS', and 'FAIN'. The first row shows '13LITC0001' with 'Low Income Taxpayer Clinics' as the grant program. The second row shows '13LITC0002'. A dropdown menu for 'FFR Due' is open, showing options: 'All Due Dates (328)' (selected), 'Today', 'One Week', 'One Month', 'Upcoming (1)', 'Past Due (327)', and 'Custom Range'. The 'FFR Status' dropdown is set to 'All Statuses (328)'. The 'Actions' dropdown is also visible.

Figure 11: Manage Reports screen - FFR Due filter

## DOWNLOAD SEARCH RESULTS

Grantors can download all search results to a spreadsheet by clicking the **Download Results** link.

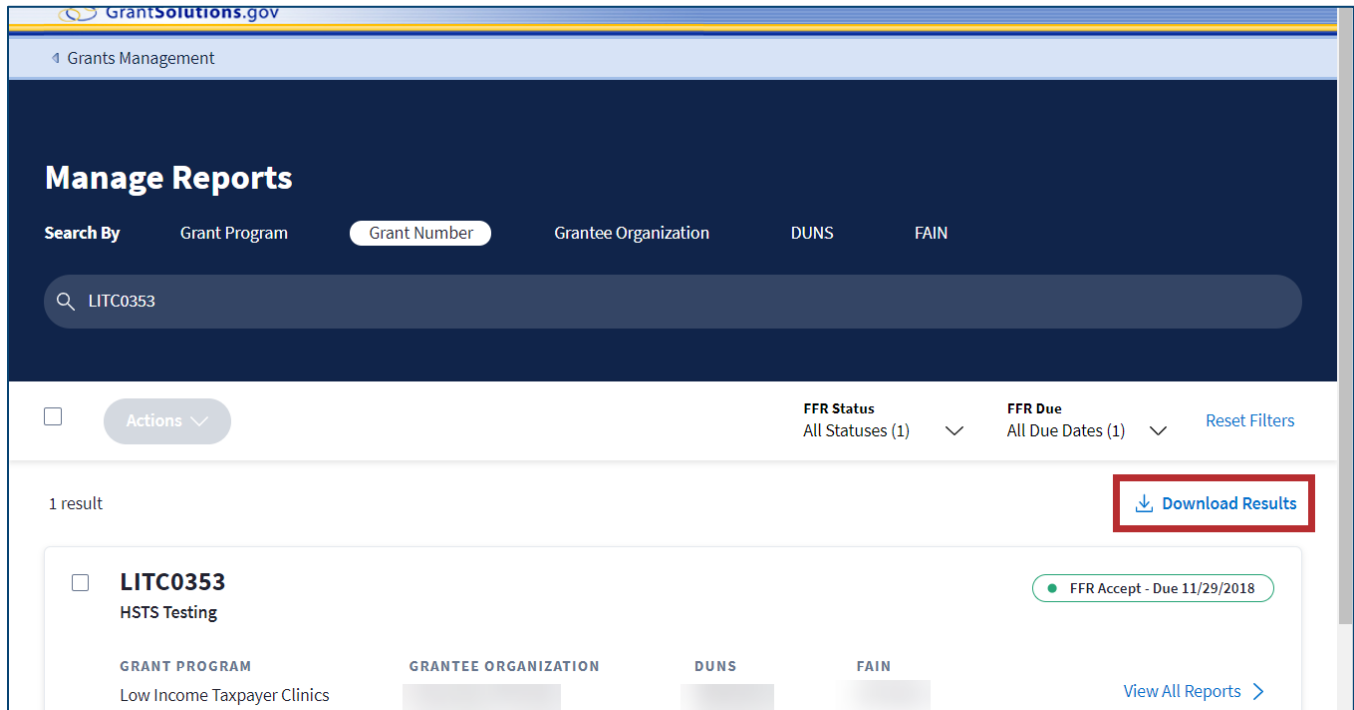


Figure 12: Manage Reports - Download Results

To download specific results to a spreadsheet, click the **checkbox** next to each desired Grant Project, select the **Actions** drop-down list, and click **Download Selected Results**.

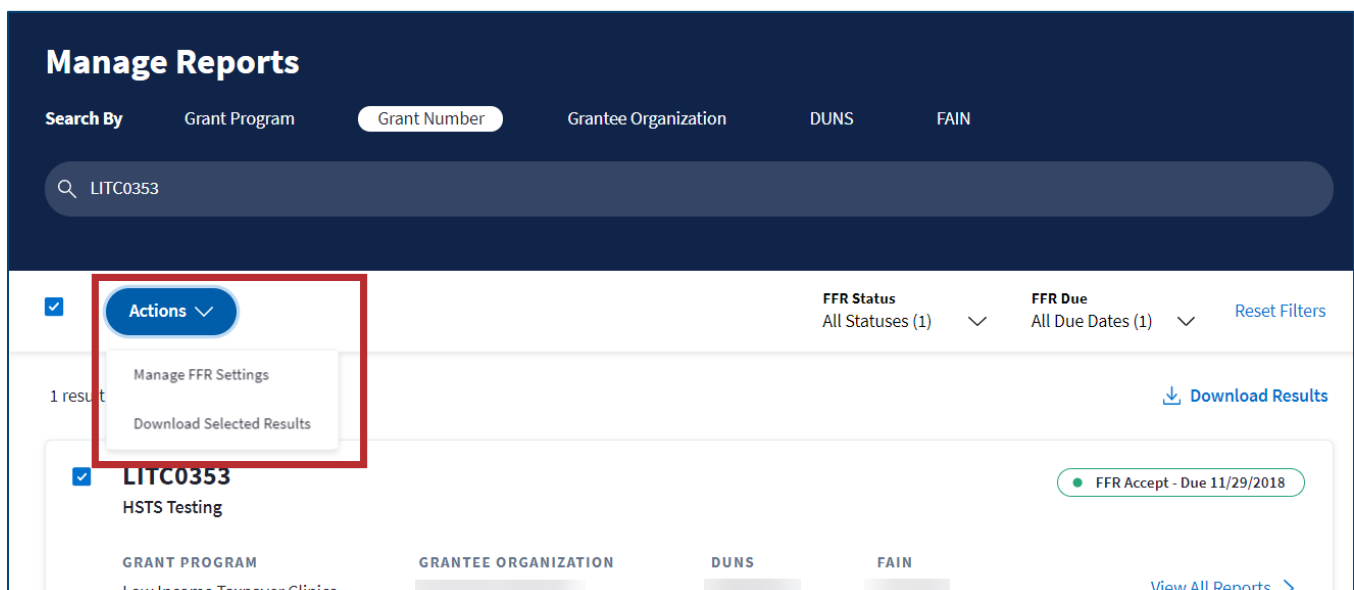


Figure 13: Manage Reports - Actions > Download Selected Results

## ACCESS REPORTS FOR A GRANT PROJECT

To access FFRs for a Grant Project:

1. Locate the Grant Project on the “Manage Reports” screen.
2. Click the **View All Reports** link.

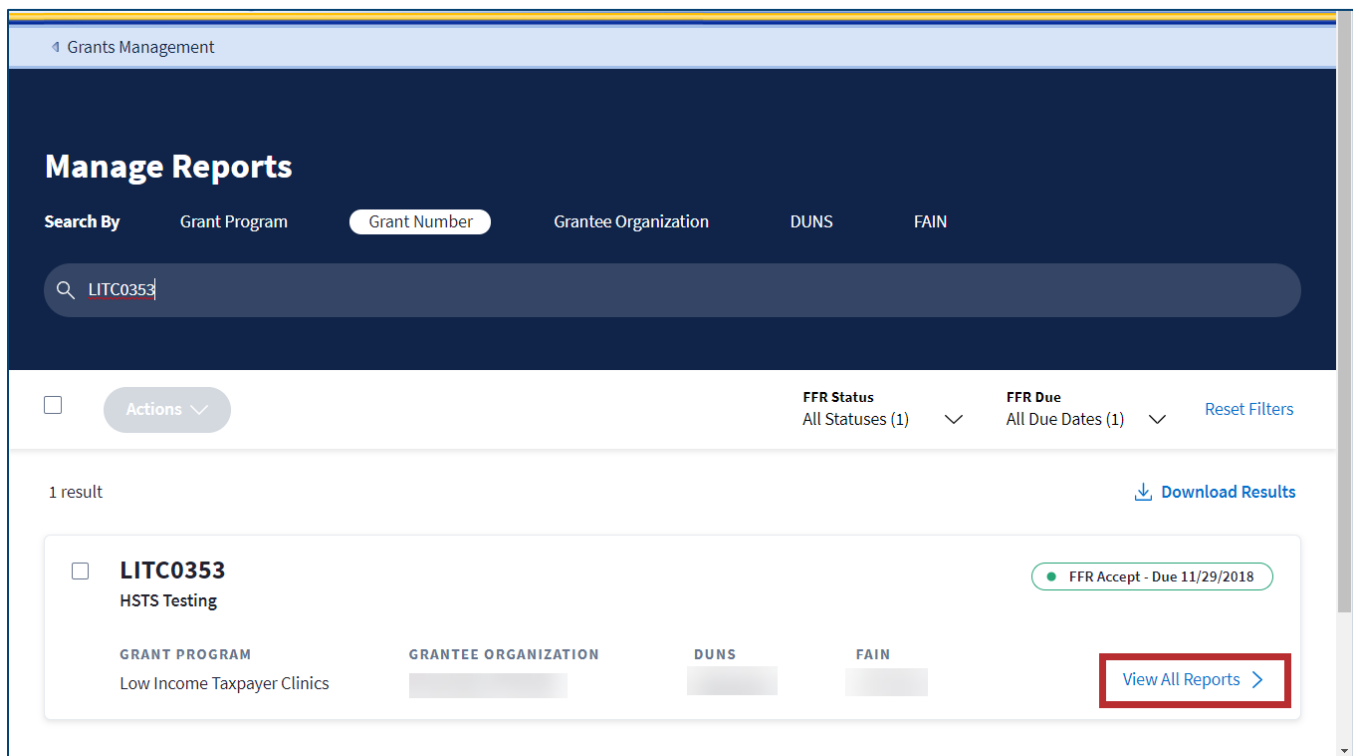


Figure 14: Manage Reports screen - View All Reports link

3. The “Manage Reports” screen refreshes. Use the **Return to Search** link to navigate to the previous view. “Manage Reports” is now divided into two sections – *Project Information* and *Reporting Periods*.

*Project Information* is located towards to the top of the screen and includes the Grant Number, Project Name, Grant Program, Grantee Organization, DUNS, and FAIN. The *Edit Report Settings* link is also available from this section. For more information on report settings, please refer to the FFR Setup Guide.

Use the **up** and **down arrows** to open or close a reporting period group.

- Click the **down arrow** ( ∨ ) to expand Past or Upcoming Reporting periods.
- Click the **up arrow** ( ∧ ) to collapse a reporting period group.

GrantSolutions.gov

Grants Management

< Back to search

## Manage Reports

**Grant Project Information**

**LITC0353**  
HSTS Testing

[Edit Report Settings](#)

GRANT PROGRAM: Low Income Taxpayer Clinics

GRANTEE ORGANIZATION: [Redacted]

DUNS: [Redacted]

FAIN: [Redacted]

1/1

**FFR**

**FFR Reporting Periods**

Past Reporting Periods

Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS
Semi-Annual FFR	08/13/2019 – in 10 days	04/01/2019 – 08/31/2019	Submitted

Upcoming Reporting Periods

[View Report](#)

Figure 15: Manage Reports screen - Grant Project information and FFR Reporting Periods

Each Reporting Period group contains the following information:

- **Type:** Quarterly, Semi-Annual, Annual and Final depending on the Federal agency reporting requirements.
- **Due Date:** Displays the report due date and includes a countdown. A report may be started, edited, and submitted even after the due date has passed.
- **Reporting Period:** The timeframe being reporting upon.
- **Status and Workflow History:** Current FFR workflow status. Click the status link (i.e. In Progress, Submitted, etc.) to view the workflow history and any comments.

Current Reporting Period					
TYPE	DUE DATE	REPORTING PERIOD	STATUS		
Semi-Annual FFR	08/13/2019 - in 10 days	04/01/2019 - 08/31/2019	<a href="#">Submitted</a>	<a href="#">View Report</a>	

Figure 16: Current Reporting Period Status link - Submitted



### FFR Reporting Workflow History

- Submitted** 08/02/2019 11:52 AM EDT  
Vi H - Program Director
- In Progress** 08/02/2019 11:52 AM EDT  
Vi H - Program Director
- Returned** 08/01/2019 02:47 PM EDT  
T E  
**Comments**  
Please make adjustments to the indirect costs.
- In Review** 08/01/2019 02:47 PM EDT  
T E
- Submitted** 07/31/2019 09:43 PM EDT  
Vi H - Program Director
- In Progress** 07/24/2019 03:19 PM EDT  
Vi H - Program Director

Figure 17: FFR Reporting Workflow History window

- **Action button:** Click the View button to view the report, bring under review, or to access the report to Accept or Return.

Current Reporting Period				
TYPE	DUE DATE	REPORTING PERIOD	STATUS	
Semi-Annual FFR	08/13/2019 – in 10 days	04/01/2019 – 08/31/2019	Submitted	
			View Report	

Figure 18: Action button - View Report

- **Actions List (Three vertical dots):** Click the three vertical dots to print the report or download a PDF version. This option is available for all statuses except Not Started.

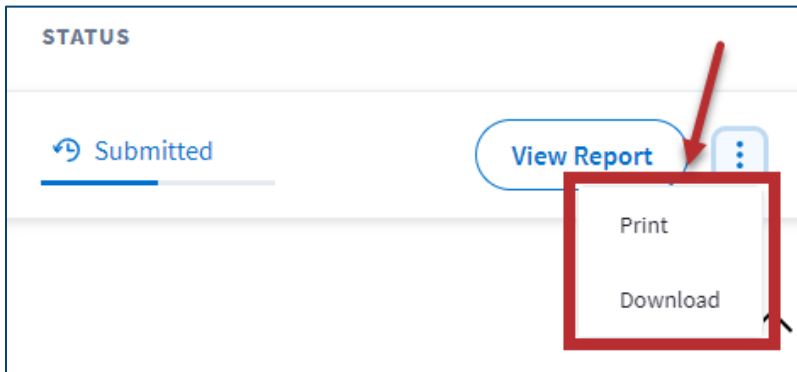


Figure 19: Actions List - Print and Download

## Review, Return, or Accept a Report

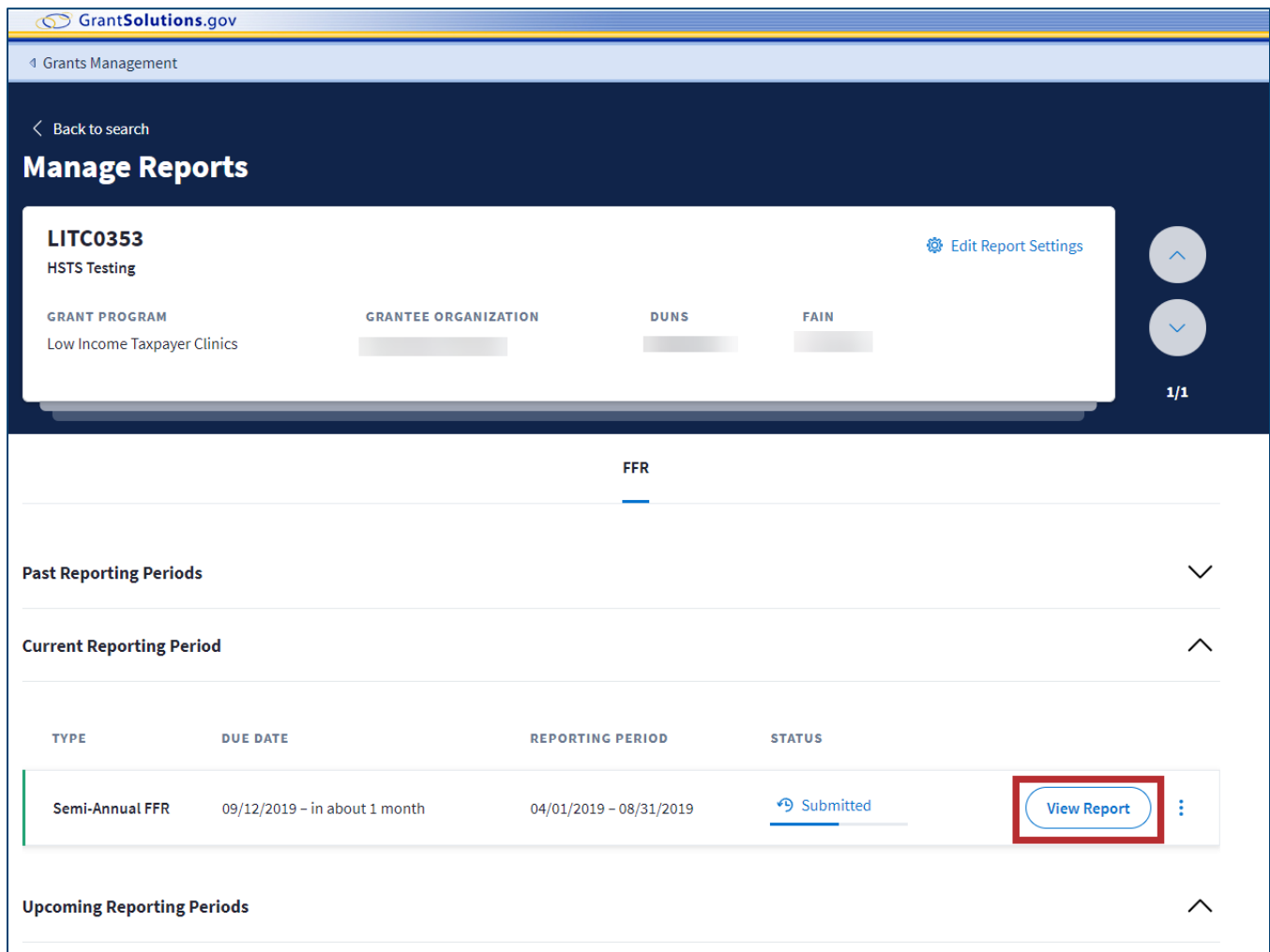
Once Grant Recipients have submitted a report, Grantors can review FFR and either return for corrections or approve.

**Tip:** Grantors can view reports in progress but cannot take any action until the status is submitted.

## REVIEW A REPORT

To begin the FFR review process, complete the following steps.

1. Log into GrantSolutions and launch the Grants Management Module (GMM) ([www.grantsolutions.gov](http://www.grantsolutions.gov)).
2. From the menu bar, select **Grants Management > Grantee Reporting > Manage FFR Reporting**.
3. The “Manage Reports” screen appears. Search for the Grant Project using one of the search options, and then click the **View All Reports** button.
4. Locate the submitted report and click the **View Report** button.



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Grants Management

< Back to search

### Manage Reports

**LITC0353**  
HSTS Testing [Edit Report Settings](#)

GRANT PROGRAM: Low Income Taxpayer Clinics  
GRANTEE ORGANIZATION:   
DUNS:   
FAIN:

1/1

FFR

Past Reporting Periods

Current Reporting Period




TYPE	DUE DATE	REPORTING PERIOD	STATUS	
Semi-Annual FFR	09/12/2019 - in about 1 month	04/01/2019 - 08/31/2019	Submitted	<a href="#">View Report</a>

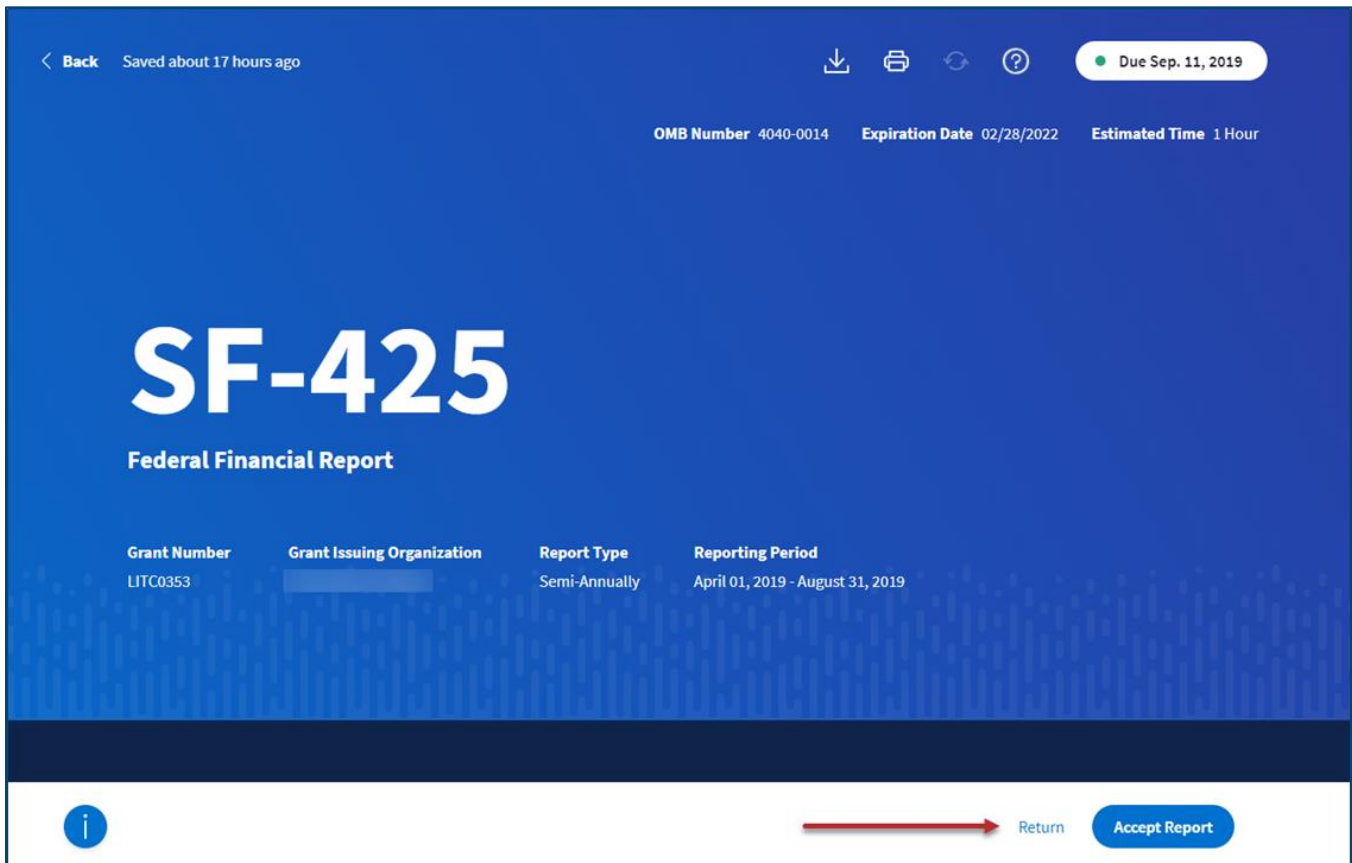
Upcoming Reporting Periods

Figure 20: Manage Reports screen - View Report button

5. The “SF-425 Federal Financial Report” screen appears, and the report status is *In Review*. The FFR is divided into several easy to use sections that are combined into a standard format when downloaded or printed. The top of the screen contains information about the form, Grant Project, and actions.

The FFR header line and the footer (Return and Accept button) are always visible when scrolling through the FFR. This header line includes the following:

- **Back link:** Click to return to “Manage Reports”
- **Saved status:** Last saved time (i.e. 3 minutes ago, 7 days ago, etc.)
- **Tool bar:**
  -  Download a zip file with the PDF version of the FFR with and any attachments
  -  Printer friendly version of the report
  -  Opens the “More Information” page containing SF-425 instructions
- **Due Date:** The date the report is due to the Federal agency



< Back Saved about 17 hours ago

Download Print Refresh Help

Due Sep. 11, 2019

OMB Number 4040-0014 Expiration Date 02/28/2022 Estimated Time 1 Hour

# SF-425

## Federal Financial Report

Grant Number	Grant Issuing Organization	Report Type	Reporting Period
LITC0353		Semi-Annually	April 01, 2019 - August 31, 2019

i

Return Accept Report

Figure 21: SF-425 Federal Financial Report screen

6. Scroll through the report to view the information entered by the Grant Recipient.

### Tell us about your organization...

Your organization information is displayed here. Please verify the pre-filled information. Enter additional information in the appropriate fields as required.

7. Basis of Accounting ⓘ Cash

8. Project/Grant Period ⓘ 09/01/2017 — 08/31/2019

9. Reporting End Date ⓘ 08/31/2019

### Report on your transactions...

Enter cumulative amounts from date of the inception of the award through the end date of the reporting period specified in line 9. Use Lines 10a through 10c, Lines 10d through 10o, or Lines 10a through 10o, as specified by the Federal agency.

#### 10. Transactions

Use lines a-c for single or multiple grant reporting.

##### Federal Cash

a. Cash Receipts ⓘ	\$ 10,000.00
b. Cash Disbursements ⓘ	\$ 600.00
c. Cash on Hand (a-b) ⓘ	\$ 9,400.00

##### Federal Expenditures and Unobligated Balance

Use lines d-o below for single grant reporting.



Return
Accept Report

Figure 22: SF-425 Federal Financial Report screen - Organization and Transactions sections

7. View Grant Recipient Remarks and uploaded attachments in line 12.

### 12. Add Remarks

Add any explanations deemed necessary or information required by the Federal sponsoring agency in compliance with governing legislation.


Start typing...


2000

#### Add attachments (optional)

Supported file formats include xls, doc, pdf, jpg/jpeg, png and ppt. A maximum of 5 files may be uploaded, and total combined file size cannot exceed 5GB. All files will be scanned for viruses.

**Attention:** Do not upload any files containing personally identifiable information, such as name and social security number or any other information that could be used to distinguish a person's identity.

 Legal Description.docx    Additional Financial Information



View original file


Figure 23: SF-425 Federal Financial Report screen - Line 12

## RETURN A REPORT

To return a report to the Grant Recipient for edits, click the **Return** link located in the page footer.


### 13. Certification


☒ I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)



V H

PI/PD, ADO,

 int1139856@gmail.com

 111-111-111

Veronica Heart

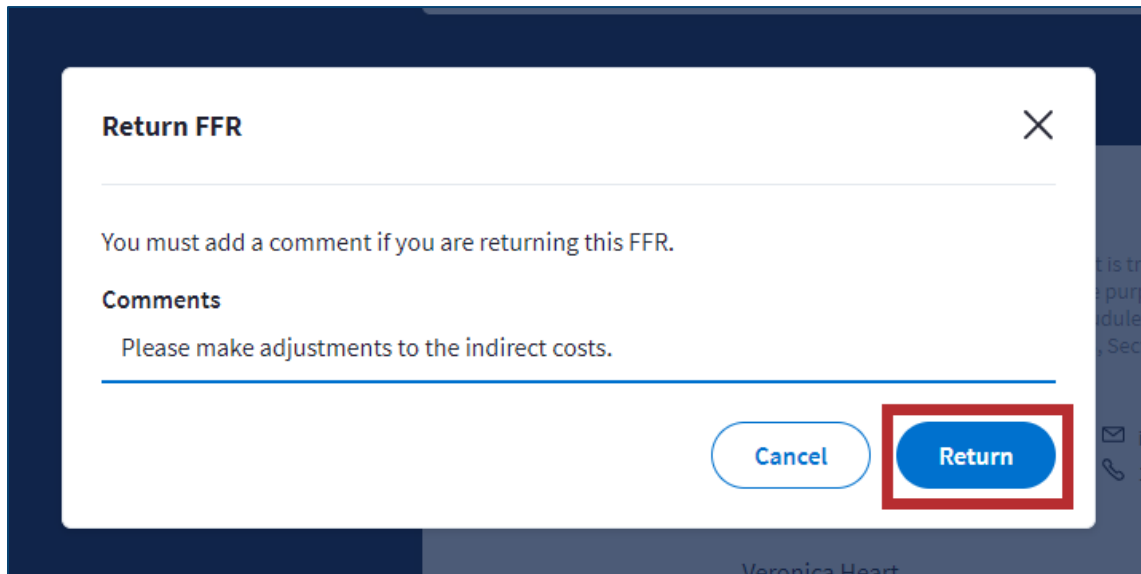
Typing your name acts as your electronic signature for the document.

Return

Accept Report

Figure 24: SF-425 Federal Financial Report screen - Return link

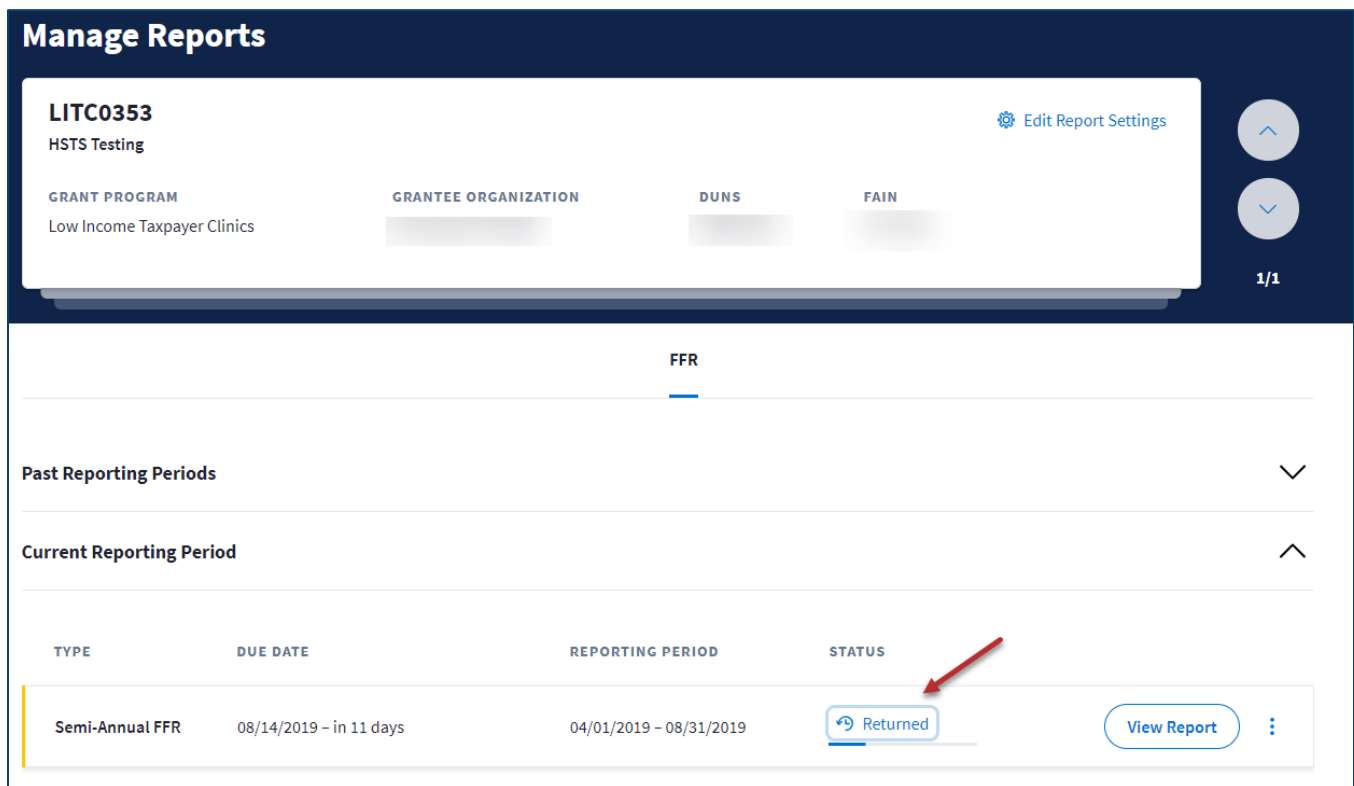
The “Return FFR” window appears. Enter a comment (required) and then click the **Return** button.



The screenshot shows a modal window titled "Return FFR" with a close button (X) in the top right corner. Inside the window, there is a text input field with the placeholder text "You must add a comment if you are returning this FFR." Below this, the section is labeled "Comments" and contains the text "Please make adjustments to the indirect costs." At the bottom right of the window, there are two buttons: "Cancel" and "Return". The "Return" button is highlighted with a red rectangular border.

Figure 25: Return FFR window - Return button

The “Manage Reports” screen reappears, and the Grant Recipient can make edits. The returned version of the report is available as a PDF by clicking the report status link and viewing the workflow history.



The screenshot shows the "Manage Reports" screen. At the top, there is a header for "LITC0353" with the subtitle "HSTS Testing" and an "Edit Report Settings" link. Below this, there are fields for "GRANT PROGRAM" (Low Income Taxpayer Clinics), "GRANTEE ORGANIZATION", "DUNS", and "FAIN". The main section is titled "FFR" and contains a table with the following columns: TYPE, DUE DATE, REPORTING PERIOD, and STATUS. The table has one row with the following data: TYPE: Semi-Annual FFR, DUE DATE: 08/14/2019 – in 11 days, REPORTING PERIOD: 04/01/2019 – 08/31/2019, and STATUS: Returned. A red arrow points to the "Returned" status link. To the right of the table, there is a "View Report" button and a vertical ellipsis menu icon.

TYPE	DUE DATE	REPORTING PERIOD	STATUS
Semi-Annual FFR	08/14/2019 – in 11 days	04/01/2019 – 08/31/2019	Returned

Figure 26: Manage Reports - Returned status link

## ACCEPT A REPORT

To approve a submitted report from the “SF-425 Federal Financial Report” screen, click the **Accept Report** button from the page footer.

**Finish and submit.**

Review and verify that all the information entered is accurate. Certify and sign to submit the report.

**13. Certification**

☒ I certify to the best of my knowledge and belief that the report is true, complete, and accurate, and the expenditures, disbursements and cash receipts are for the purposes and intent set forth in the award documents. I am aware that any false, fictitious, or fraudulent information may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

**VH** **Victor Harris**  
PI/PD, ADO, University of Tennessee

int1139856@gmail.com  
111-111-111

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Typing your name acts as your electronic signature for the document.

Return **Accept Report**

Figure 27: SF-425 Federal Financial Report screen - Accept Report

The “Accept FFR” window appears. If desired, enter an optional comment and click the **Accept** button.

**Accept FFR**

Comments are optional if you are accepting this FFR.

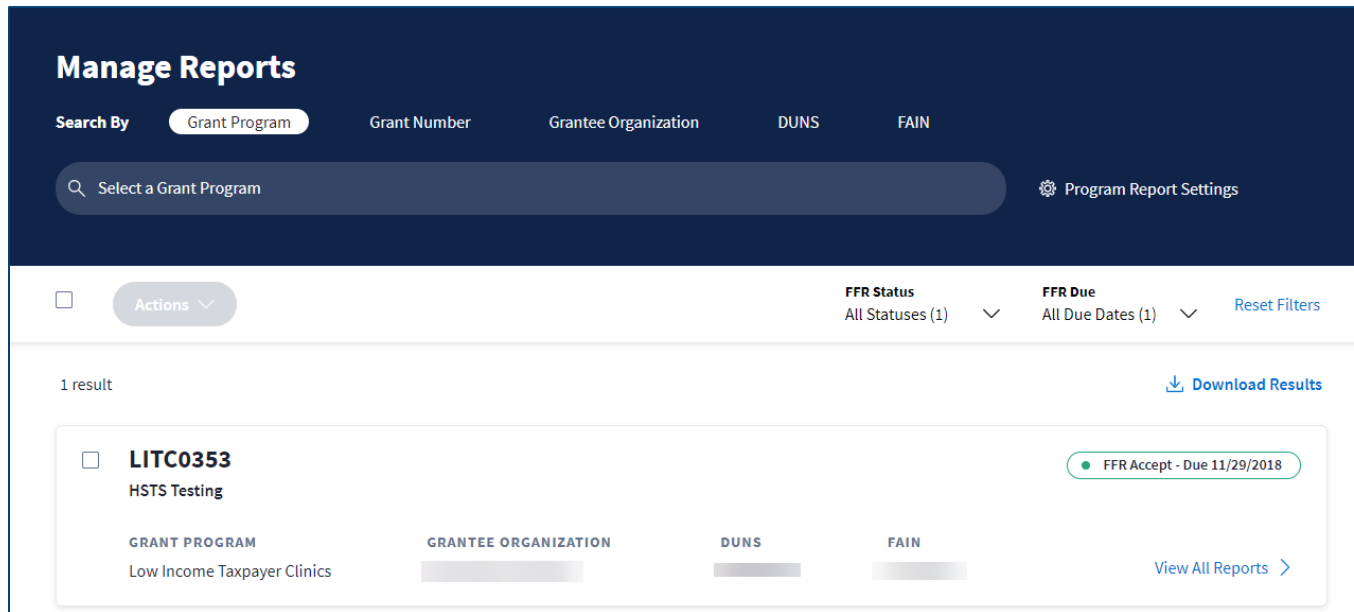
**Comments**

Start Typing...

Cancel **Accept**

Figure 28: Accept FFR window - Accept button

The “Manage Reports” screen appears, and the process is complete.



The screenshot shows the "Manage Reports" interface. At the top, there's a dark blue header with the title "Manage Reports". Below the header, a "Search By" section includes tabs for "Grant Program", "Grant Number", "Grantee Organization", "DUNS", and "FAIN". A search bar with the placeholder "Select a Grant Program" is present, along with a "Program Report Settings" link. Below the search bar, there's a section with filters: "FFR Status" (All Statuses (1)) and "FFR Due" (All Due Dates (1)), with a "Reset Filters" link. A "Download Results" link is also visible. The main content area shows "1 result" and a table with one entry:

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN
LITC0353 HSTS Testing Low Income Taxpayer Clinics			

Additional details for the entry include a checkbox, a status badge "FFR Accept - Due 11/29/2018", and a "View All Reports" link.

Figure 29: Manage Reports screen

**Tip:** A report can be returned to the Grant Recipient by the Grantor even after it is accepted.