

# GrantSolutions Master Series Performance Progress Report (PPR)

# Agenda

- Performance Progress Reporting (PPR) Background
- Features and Benefits
- PPR Demonstration
- Closing Remarks & Questions

# Performance Progress Reporting Background

- **Grant Notes** has been the catch-all for all report submissions and communications
  - No alerts in place for reminders of upcoming activities
  - Difficult to provide insight into tracking (for recipients and program staff), or to make revisions

### Grant Notes - Add

Author

Anna-Lisa Walters

Subject \*

Site Visit

Note Type \*

☐ Correspondence ☒ Internal

Category Type \*

Site Visit Report

Notes \*

Please see attached

Note Attachments

Author



Anna-Lisa Walters

Description

File to Upload:

Browse...

Upload

Description	Source Attachments	Status	Actions
Site Visit Report	report.docx	QUEUED	 

\* Status updates every 10 seconds

Submit

Cancel

# Why the PPR functionality?

**Get the Progress Reports out of Grant Notes and into an organized structure!**

*This is a **NEW** service for Program Offices to begin collecting PPR data in a more structured format to set due dates, establish the report frequency, and have the ability to accept or return reports.*

## **Benefits of the PPR:**

- Easier to find when you need them, rather than having to filter through the Grant Notes
- Track PPR submission status
- Capture version history of PPR submissions
- Notifications and reminder alerts sent to Grantors and Recipients
- PPR cycle displays on Notice of Award

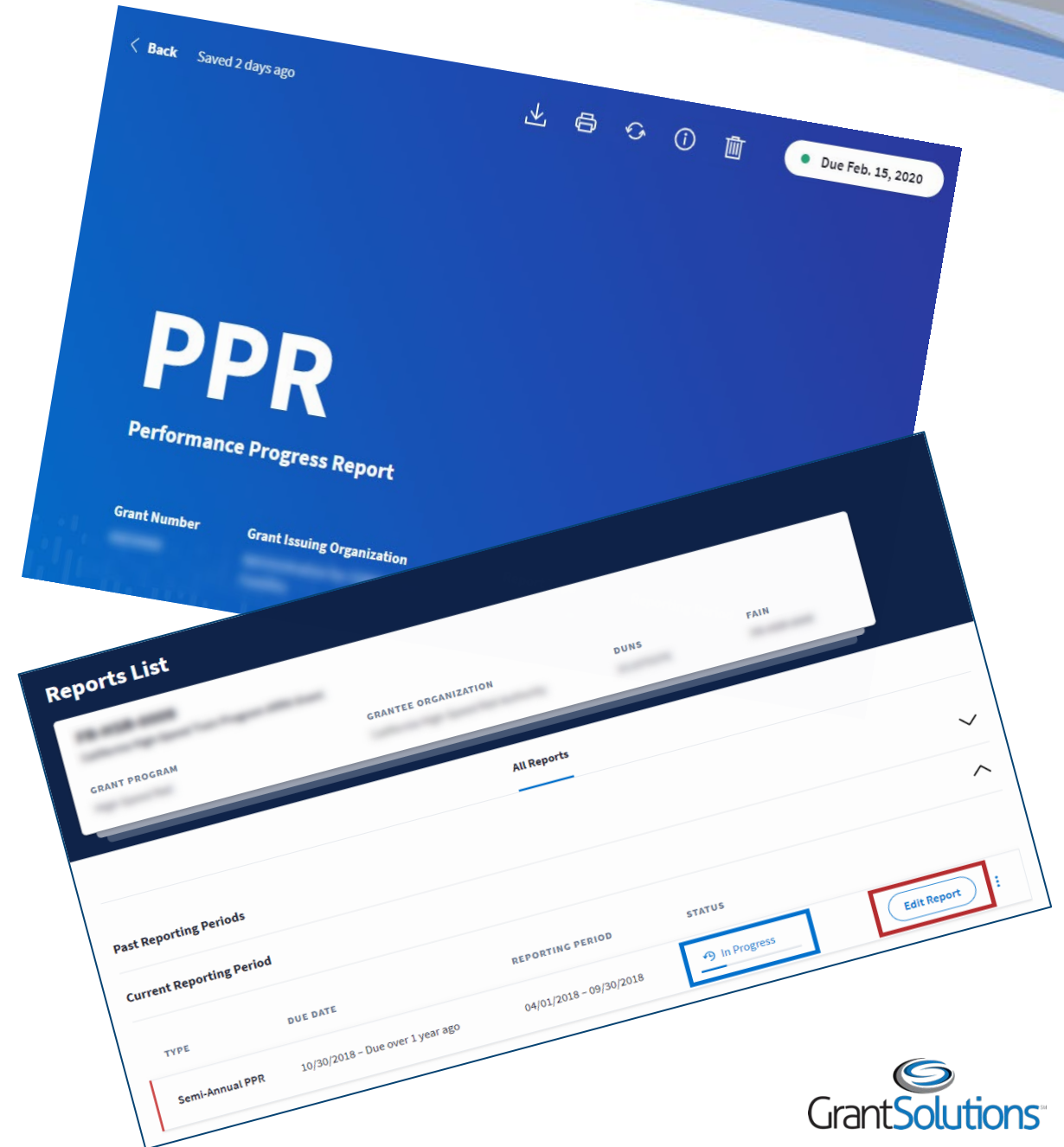
# Advantages for Grantors

- Program staff can accept or return PPRs and provide comments, all from one location
- Flexibility to configure the PPR report settings at the Grant Program level
- Business Intelligence reports available to track receipt and current status

The screenshot displays the GrantSolutions.gov web application. The top navigation bar includes the logo and the text 'GrantSolutions.gov'. Below this, a breadcrumb trail shows '1 Grants Management'. The main section is titled 'Manage Reports' and features a search bar with the placeholder 'Select a Grant Program'. To the right of the search bar are links for 'Grant Number', 'Grantee Organization', 'DUNS', and 'FAIN'. A 'Program Report Settings' link is also visible. The 'PPR Settings' section is active, showing a 'View Change Log' link. The 'Award' section has a toggle switch for 'Display Reporting Information on Notice of Award' which is currently turned off. The 'Reporting Period' section includes dropdown menus for 'Reporting Cycle' (set to 'Fiscal Year') and 'Frequency' (set to 'Semi-Annually'). At the bottom, a message states 'Modify the PPR report settings for all future reporting periods for 91 Grants', with 'Cancel' and 'Save 0 Changes' buttons.

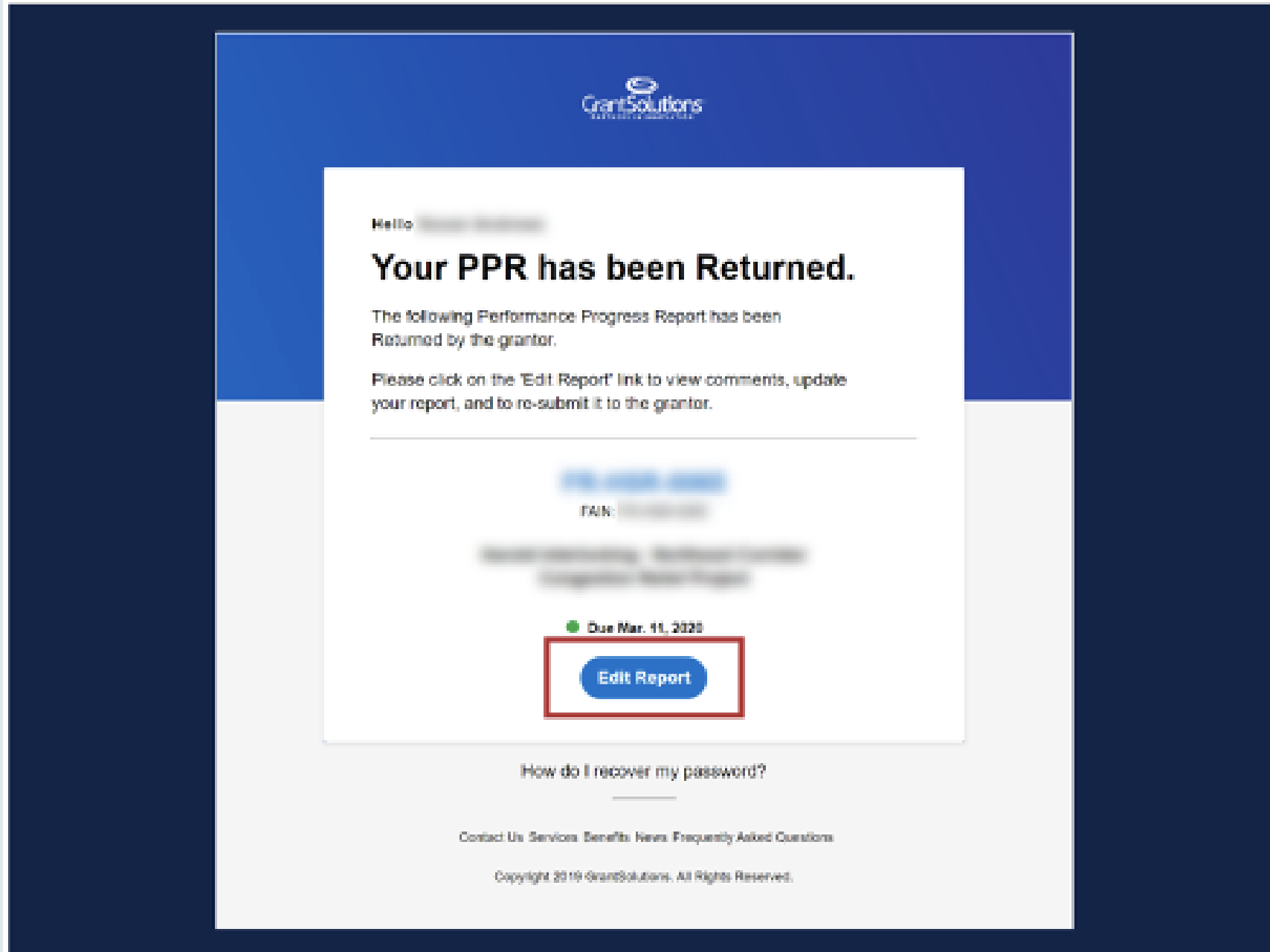
# Impact to Recipients

- Notification reminders
- Transparency into workflow
  - Recipients can readily check the submission status
- Allow for easy revisions if changes need to be made
  - Requested revision changes are captured directly in the tool
  - Keeps all versions of PPR
- Auto Save
- All PPRs stored in one central location
- On-screen indicators to confirm actions



# Notifications

Subject: **Your PPR has been Returned.**  
From: <no-reply@grantsolutions.gov>  
To: [REDACTED]  
Date: 2020-02-10 16:27



The image shows a screenshot of an email notification from GrantSolutions. The email has a blue header with the GrantSolutions logo. The main body is white and contains the following text:

Hello [REDACTED]

**Your PPR has been Returned.**

The following Performance Progress Report has been Returned by the grantor.

Please click on the 'Edit Report' link to view comments, update your report, and to re-submit it to the grantor.

Below this text is a blurred image of a Performance Progress Report (PPR) form. At the bottom of the blurred image, there is a green dot followed by the text "Due Mar. 11, 2020". Below this, there is a blue button with the text "Edit Report" inside a red rectangular border.

At the bottom of the email, there is a link "How do I recover my password?" and a footer with the text "Contact Us Services Benefits News Frequently Asked Questions" and "Copyright 2019 GrantSolutions. All Rights Reserved."

# PPR Demonstration



# Closing Remarks

- For more information to onboard Programs and Grant Programs, please contact your GrantSolutions Partner Services Representative or [information@grantsolutions.gov](mailto:information@grantsolutions.gov)
- The PPR can be turned on at no additional cost, as it is already a part of the GrantSolutions service offering

# Questions?



Thanks for attending!



# Additional Information

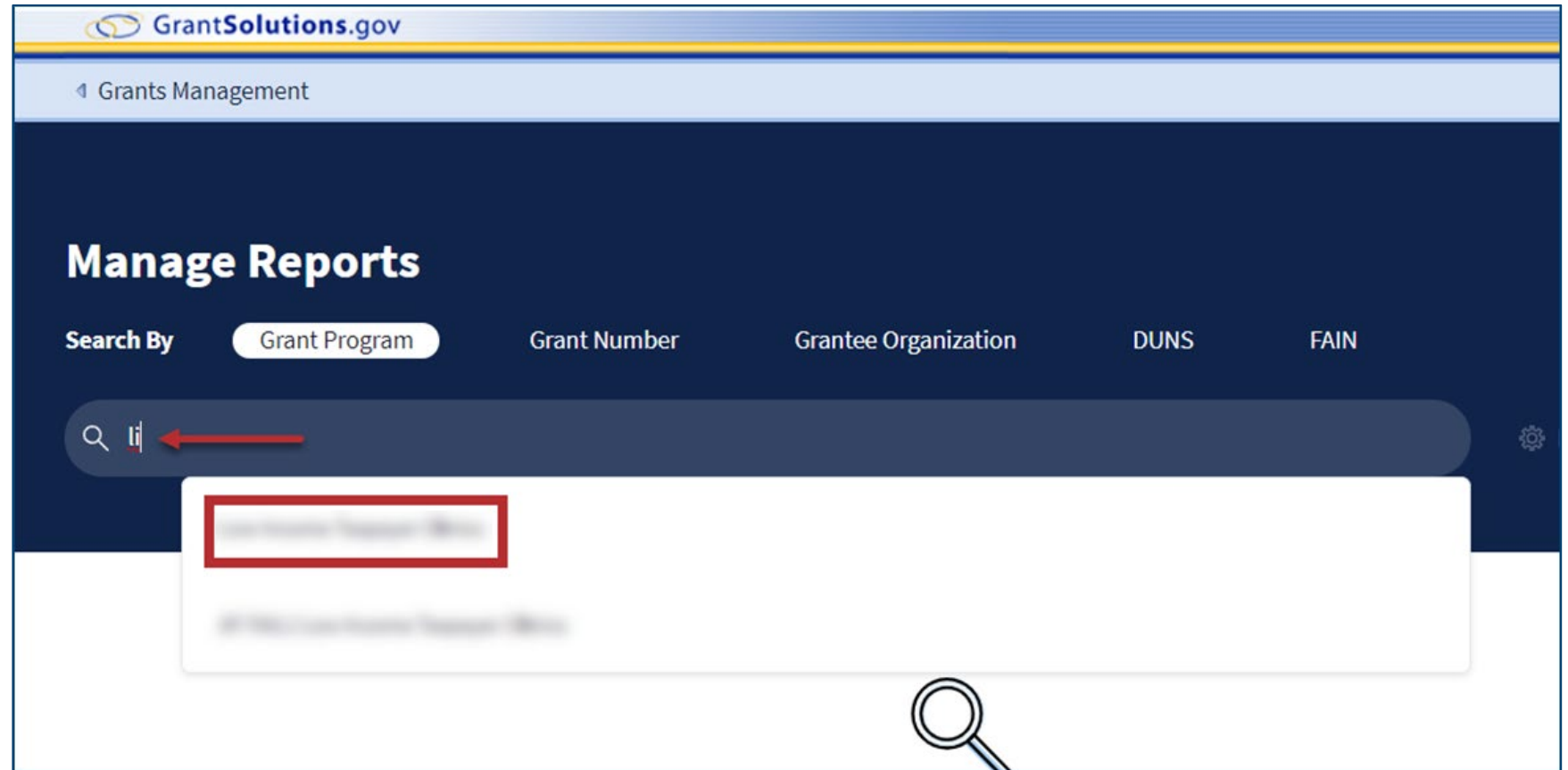
# Configure PPR Settings

## Roles to Create, Edit, and View Settings Configuration:

- Program Budget Officer (PBO)
- Authorizing Official (AO)
- Program Officer (PO)
- Grants Management Officer (GMO)
- Grants Management Specialist (GMS)

## Features:

- Manage Reports screen
- Search by Grant Program, Grant Number, Grantee Organization, DUNS, or FAIN



# Configure PPR Settings

## Manage Reports

Search By

Grant Program

Grant Number

Grantee Organization

DUNS

FAIN

Program Report Settings

☐ Actions

FFR Status  
All Statuses (410)

FFR Due  
All Due Dates (4...)

PPR Status  
All Statuses (410)

PPR Due  
All Due Dates (4...)

[Reset Filters](#)

410 results

[Download Results](#)

☐

FFR Not Started - Due 04/30/2000

PPR Not Enabled

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN

[View All Reports](#)

☐

FFR Not Started - Due 10/30/2005

PPR Not Enabled

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN

[View All Reports](#)

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# Configure PPR Settings

- Report Settings screen
- Back to search button
- PPR Settings tab
- View Change Log button
- Award section
- Reporting Period section

< Back to search

## Report Settings

GRANT PROGRAM

76 Grants

FFR Settings **PPR Settings**

[↻ View Change Log](#)

### Award

Display Reporting Information on Notice of Award ⓘ ☒

### Reporting Period

Reporting Cycle ⓘ Calendar Year ▼

Modify the PPR report settings for all future reporting periods for 76 Grants

[Cancel](#) [Save 0 Changes](#)


# Configure PPR Settings

- Submission section
- Final Report section
- Report Returned section
- Save Changes button

**Submission**  
Due Date ⓘ 30 day(s)

**Final Report**  
Require a final report? ⓘ ☒  
Final Report Due Date ⓘ 20 day(s)

**Report Returned**  
Resubmission Due Date ⓘ 30 day(s)

 Modify the PPR report settings for all future reporting periods for 4 Grants

Cancel

Save 1 Change



# Upload a PPR

## Roles to View, Edit, and Submit a PPR:

- Grantee Authorizing Official (ADO)
- Principle Investigator/Program Director (PI/PD) assigned to the Grant Project
- Financial Officer (FO)

## Features:

- Reports List screen
- Project Information section
- Reporting Periods section
- Start Report button

### Reports List

GRANT PROGRAM

GRANTEE ORGANIZATION

DUNS

FAIN

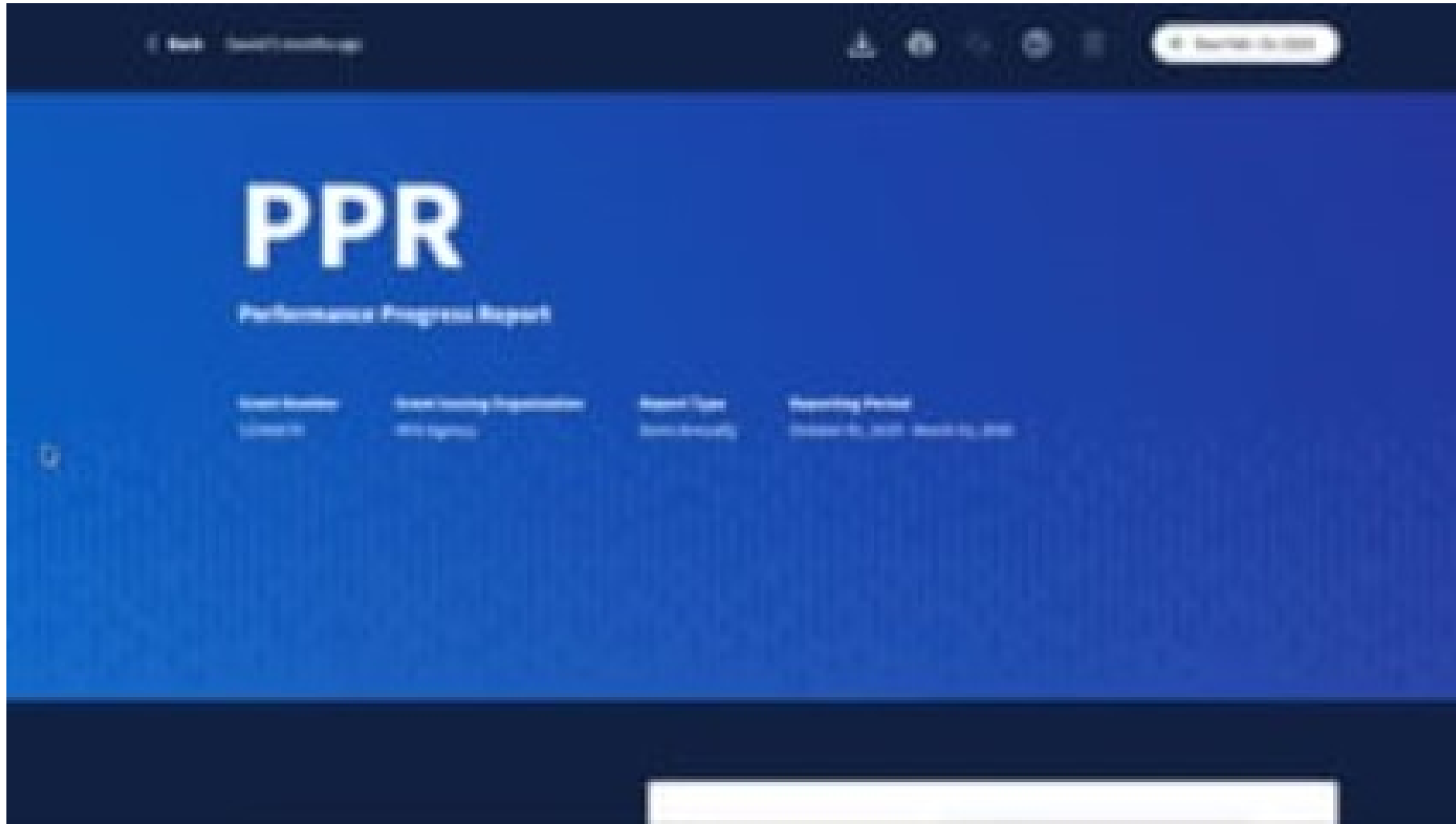
All Reports

Past Reporting Periods

Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS	
Quarterly PPR	03/17/2020 - Due in 3 months	11/17/2019 - 02/16/2020	Not Started	<div>Start Report</div>

# Upload a PPR



The screenshot shows a web application interface for uploading a Performance Progress Report (PPR). The header is dark blue with a navigation bar containing a home icon, a search bar, and a 'New PPR' button. The main content area has a blue background with the text 'PPR' in large white letters, followed by 'Performance Progress Report' in smaller white text. Below this, there are four input fields: 'Grant Number' (with a dropdown arrow), 'Submitting Organization' (with a dropdown arrow), 'Report Type' (with a dropdown arrow), and 'Reporting Period' (with a date range input). A small icon of a document with a plus sign is visible on the left side of the form. At the bottom, there is a white rectangular button.

Home Search New PPR

# PPR

Performance Progress Report

Grant Number Submit

Submitting Organization Submit

Report Type Submit

Reporting Period Submit to Submit to

Submit

# Upload a PPR

## Review your report details...

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

1. Grant Issuing Organization ⓘ	<input type="text"/>	🔒
2. Grant Number ⓘ	<input type="text"/>	🔒
3a. DUNS Number ⓘ	<input type="text"/>	🔒
3b. EIN ⓘ	<input type="text"/>	🔒
4. Organization Name ⓘ	<input type="text"/>	🔒
5. Organization Address ⓘ	<input type="text"/>	🔒
6. Project Period ⓘ	08/17/2010 — 12/31/2022	📅
7. Reporting Period ⓘ	11/17/2019 — 02/16/2020	📅
8. Report Type ⓘ	Quarterly	🔒

# Upload a PPR

## Report on your performance...

Provide a narrative for your performance and attach supporting documents as required.

### 9. Enter your performance narrative

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

Start typing...


2000

### Upload supporting documents as required

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.

**Note:** At least one attachment is required to submit this report.



Choose Files to Upload

or drag and drop them here

# Upload a PPR

## Finish and submit.

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

**10. Certification**

☐ I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents.

**SH** [Redacted Signature]

Enter full name.....

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

**Submit Report**

# Approve or Return a PPR

## Roles to View, Review, Accept, and Return a PPR:

- Program Budget Officer (PBO)
- Authorizing Official (AO)
- Program Officer (PO)

## Features:

- Manage Reports screen
- Filters
- Download Results
- FFR and PPR Statuses
- Actions drop-down
- View All Reports button

The screenshot displays the 'Manage Reports' interface. At the top, there's a dark blue header with the title 'Manage Reports'. Below it, a 'Search By' section includes tabs for 'Grant Program', 'Grant Number' (which is selected), 'Grantee Organization', 'DUNS', and 'FAIN'. A search bar is positioned below these tabs. The main content area has a white background and includes a table with one result. Above the table, there are filter controls for 'FFR Status' (All Statuses (1)), 'FFR Due' (All Due Dates (1)), 'PPR Status' (All Statuses (1)), and 'PPR Due' (All Due Dates (1)), along with a 'Reset Filters' link. The table has columns for 'GRANT PROGRAM', 'GRANTEE ORGANIZATION', 'DUNS', and 'FAIN'. To the right of the table, there are two status indicators: 'FFR Not Started - Due 11/17/2019' and 'PPR Not Started - Due 10/01/2019'. A 'Download Results' link is located above the table. A 'View All Reports' button with a right arrow is highlighted with a red box in the bottom right corner of the table area.

# Approve or Return a PPR

Back to search

Manage Reports

Edit Report Settings

GRANT PROGRAM

GRANTEE ORGANIZATION

DUNS

FAIN

All Reports

FFR

PPR





Past Reporting Periods


Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Semi-Annual PPR	12/21/2019 - Due 6 days ago	08/17/2019 - 02/16/2020	Submitted	View Report

# Approve or Return a PPR

[< Back](#) Saved 2 days ago



 Due Feb. 15, 2020

# PPR

## Performance Progress Report

Grant Number	Grant Issuing Organization	Report Type	Reporting Period



# Approve or Return a PPR

## Finish and submit.

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

### 10. Certification

☒ By signing this report, 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 objectives set forth in the terms and conditions of the Federal award. I am aware that any false, fictitious, or fraudulent information, or the omission of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims or otherwise. (U.S. Code Title 18, Section 1001 and Title 31, Sections 3729-3730 and 3801-3812)

ML

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

Return

Accept Report

# PPR Cycle Displays on Notice of Award

RECIPIENT NAME: [REDACTED]

AGREEMENT NUMBER: [REDACTED]

## Performance Progress Report Cycle

Reporting Period Start Date	Reporting Period End Date	Reporting Type	Reporting Period Due Date
07/10/2015	09/30/2015	Semi-Annual	10/30/2015
10/01/2015	03/31/2016	Semi-Annual	04/30/2016
04/01/2016	09/30/2016	Final	10/30/2016