



GrantSolutions User Guide

Grantor Process: Submit Performance Progress Report on Behalf of Recipient

February 2024

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Introduction

GrantSolutions provides comprehensive management of Performance Progress Reports (PPRs) for Grantors and Grant Recipients. Federal Grants staff schedule report cycles, determine due dates, and in addition to Grant Recipient staff, Federal Grants staff can electronically submit PPRs. PPRs submitted by Grantors are on behalf of Grant Recipients.

PPRs submitted by Grantors must be on a quarterly, semi-annual, or annual basis, as directed by the Federal agency. When required, a final PPR is submitted at the completion of the award agreement.

ROLES AND ACTIONS

Grantors with the following roles can **initiate**, **view**, **edit**, **submit** and **delete** the PPR:

- Grants Management Officer (GMO)
- Grants Management Specialist (GMS)

PPR STATUSES

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

- *Not Started*: Neither Grant Recipient nor Grantor has entered any data in the report
- *In Progress*: Grant Recipient or Grantor has entered data in the report and not yet submitted
- *Submitted*: Grant Recipient has submitted the report to the Grantor, or Grantor has submitted the report on behalf of the Recipient
- *In Review*: Grantor has started the review process
- *Accepted*: Grantor has approved the PPR
- *Returned*: Grantor has returned the PPR to the Grant Recipient for edits
- *Past Due*: The PPR Due Date is in the past and the report has not been submitted

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

Workflow Status	Possible Grant Recipient Actions
<i>Not Started</i>	Start Report
<i>In Progress</i>	Edit Report, Print, Download (PDF)
<i>Submitted</i>	View Report, Print, Download (PDF)
<i>In Review</i>	View Report, Print, Download (PDF)
<i>Accepted</i>	View Report, Print, Download (PDF)
<i>Returned</i>	Edit Report, Print, Download (PDF)

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

NOTIFICATIONS

Grant Recipients that can edit and/or submit the PPR receive email notifications from GrantSolutions in the following instances:

- 14 days before the PPR is due
- One day after the PPR is due if the report was not submitted
- When the PPR is submitted by the Grant Recipient
- When the PPR is submitted by the Grantor on behalf of the Grant Recipient
- When the PPR is accepted by the Grantor
- When the PPR is returned by the Grantor for changes

Login and Access Performance Progress Reports List

The GrantSolutions “Manage Reports” screen contains all Grant Projects and associated PPRs for a Grant Program grouped by the current reporting period, past reporting periods, and upcoming reporting periods.

To log into GrantSolutions and access PPRs, complete the following steps:

1. From a browser such as Internet Explorer or Google Chrome, navigate to www.grantsolutions.gov and click the **Login** button.

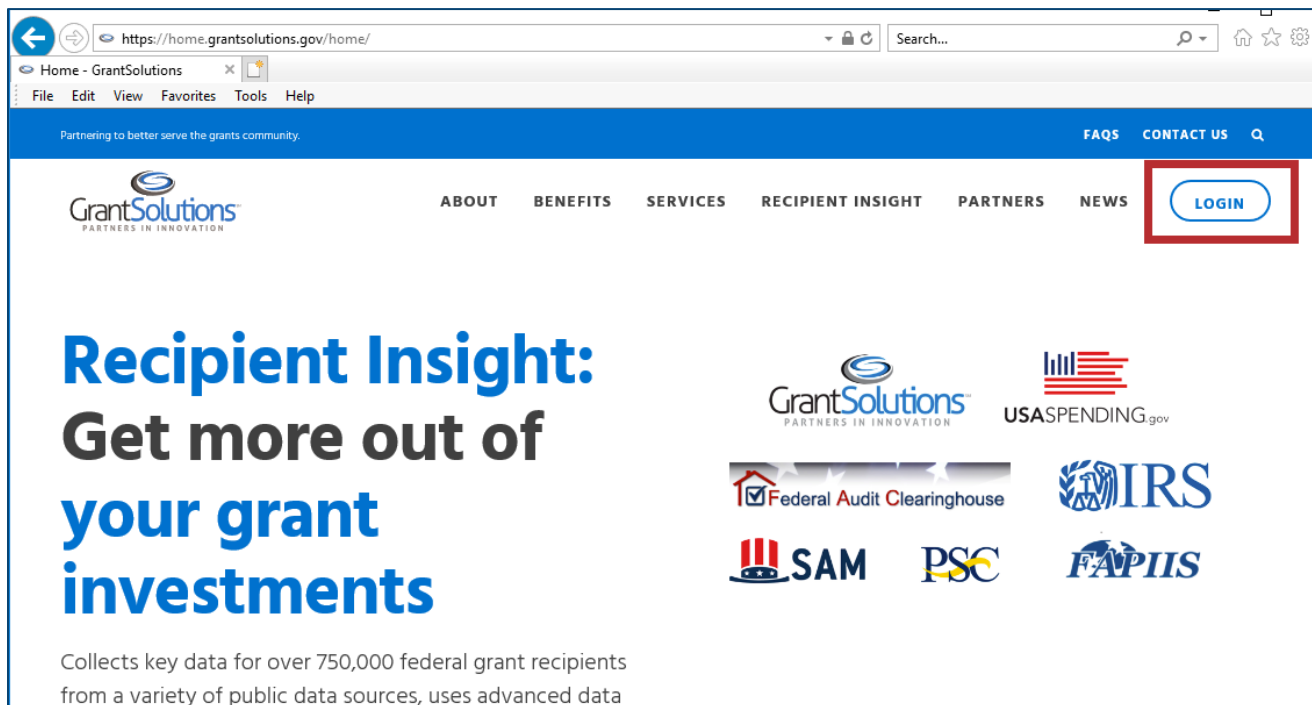


Figure 1: GrantSolutions Home page - Login button

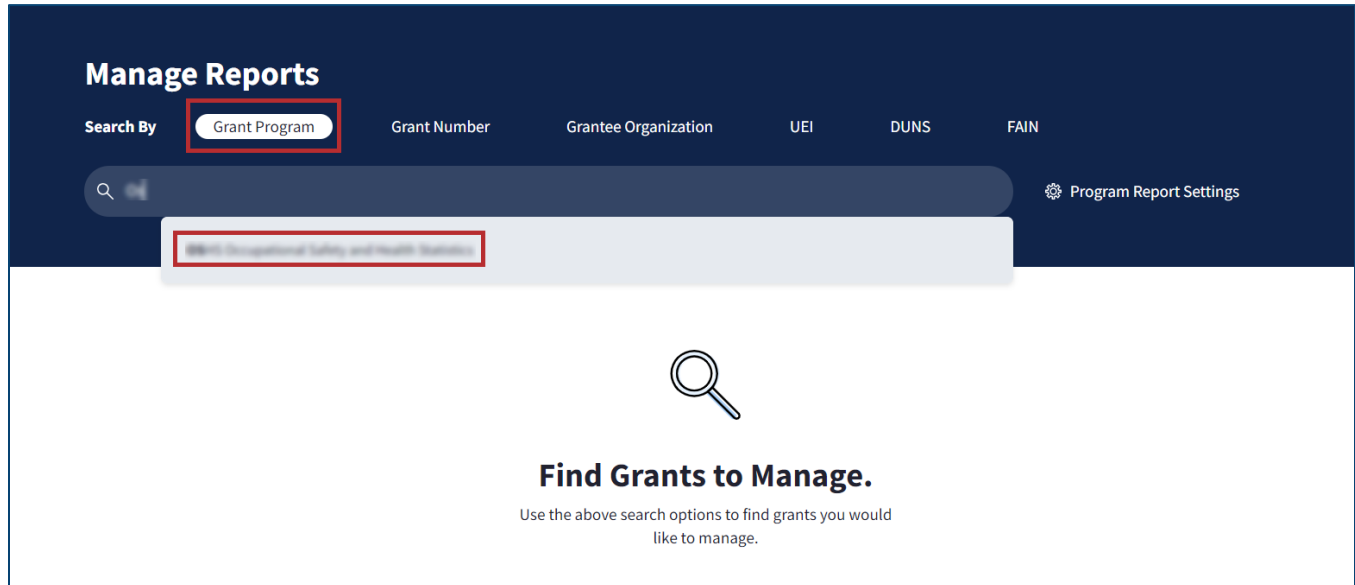
- The “GrantSolutions Login” screen appears. Enter your **Username** and **Password** and click the **Submit** button.

Figure 2: GrantSolutions Login screen

- The “Grants List” screen appears. To access PPRs, click the **Grants Management** drop-down in the Grants Management Module (GMM) menu bar and select **Manage Reports**.

Figure 3: Grants Management tab with Manage Reports option

- On the “Manage Reports” screen, select a **Search By** option and type corresponding text in the **search** field. If needed, press **Enter** from the keyboard to activate the search.



Manage Reports

Search By **Grant Program** Grant Number Grantee Organization UEI DUNS FAIN

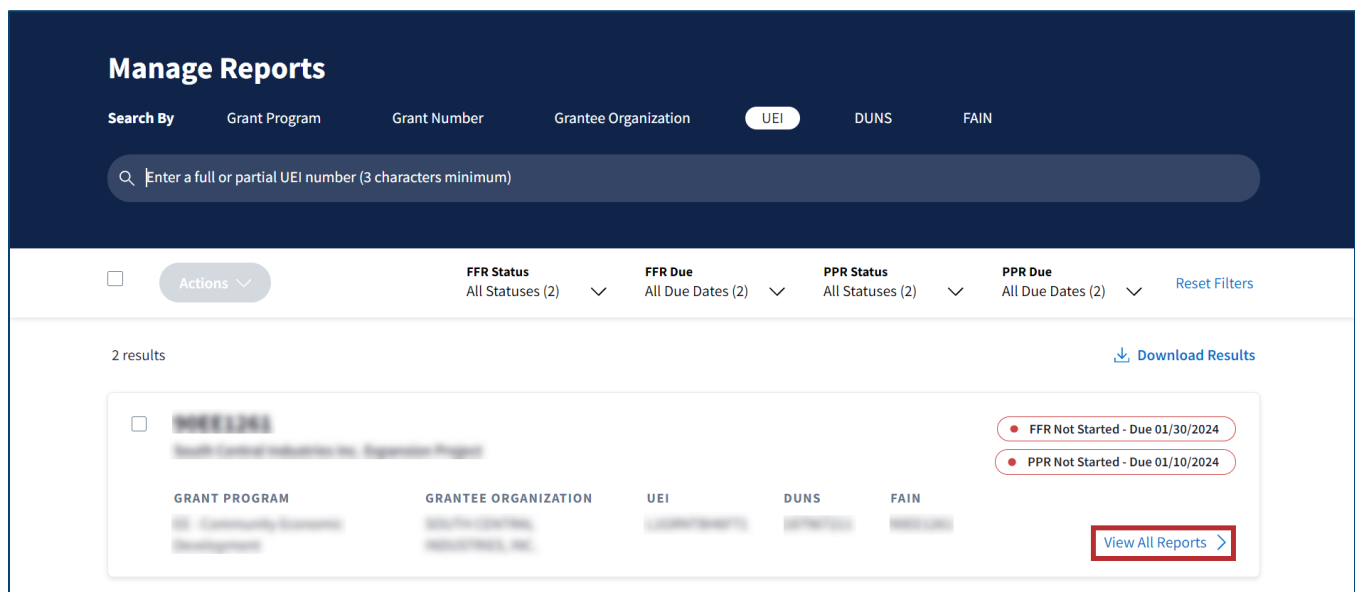
Program Report Settings

Health Occupational Safety and Health Statistics

Find Grants to Manage.
Use the above search options to find grants you would like to manage.

Figure 4: Manage Reports screen with Search section

- In the results table, click the **View All Reports** button for the desired Grant Project.



Manage Reports

Search By Grant Program Grant Number Grantee Organization **UEI** DUNS FAIN

Enter a full or partial UEI number (3 characters minimum)

Actions FFR Status All Statuses (2) FFR Due All Due Dates (2) PPR Status All Statuses (2) PPR Due All Due Dates (2) Reset Filters

2 results Download Results

GRANT PROGRAM	GRANTEE ORGANIZATION	UEI	DUNS	FAIN
01 - Community Economic Development	Health Occupational Safety and Health Statistics	H0001200	H0001200	H0001200

FFR Not Started - Due 01/30/2024
PPR Not Started - Due 01/10/2024

View All Reports

Figure 5: Manage Reports screen with results and View All Reports button

When the screen refreshes, reporting period sections appear below with both FFRs and PPRs.

[Back to search](#)

Manage Reports

DEELINE

South Central Adult Day Programming Project

Edit Report Settings

GRANT PROGRAM

GRANTEE ORGANIZATION

UEI

FAIN

DE Community Economic Development

DEPARTMENT OF COMMUNITY DEVELOPMENT, INC.

12345678901234567890

DEELINE

9/1406

All Reports

FFR

PPR

Past Reporting Periods

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	01/10/2024 – Due about 1 month ago	10/01/2023 - 12/31/2023	Not Started	<div>Start Report</div> <div></div>
Quarterly FFR	01/30/2024 – Due 23 days ago	10/01/2023 - 12/31/2023	Not Started	<div>Start Report</div> <div></div>

Figure 6: Manage Reports screen

Enter and Submit the Performance Progress Report

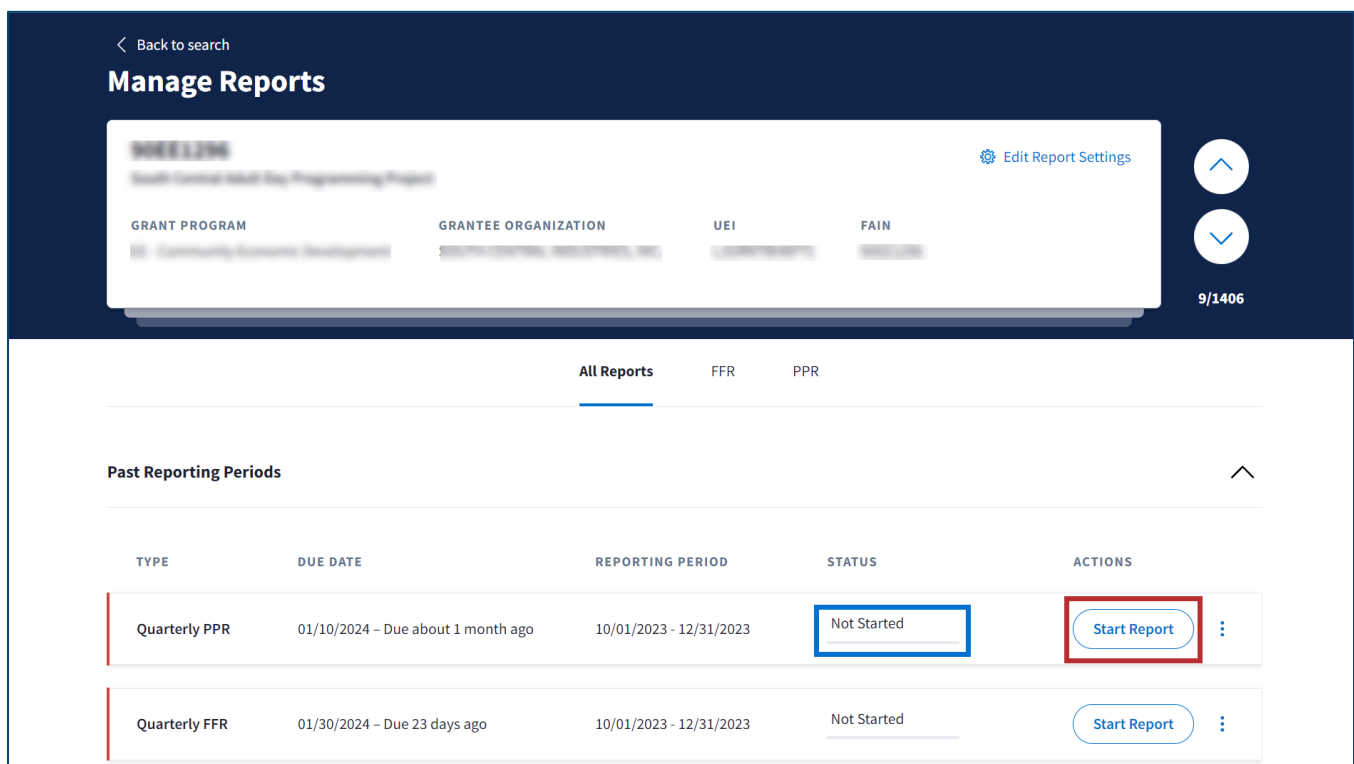
Grantors can enter and submit an PPR on behalf of a Grant Recipient once the report period start date has passed. Although PPRs can be submitted late, they will be marked as *Past Due*.

Only PPRs in the *Past Reporting Periods* or *Current Reporting Periods* sections can be started; reports in the *Upcoming Reporting Periods* section are not editable.

To enter and submit an PPR, complete the following steps:

1. From the “Manage Reports List” screen, click the **Start Report** button for the desired PPR with the *Not Started* status.

Note: Alternatively, if the report is started and bears the *In Progress* status, click the **Edit Report** button to complete and submit.



The screenshot shows the 'Manage Reports' interface. At the top, there's a header with a back arrow and 'Back to search'. Below it, the title 'Manage Reports' is displayed. A summary card shows 'OVERVIEW' for 'South Central Adult Day Programming Project' with fields for GRANT PROGRAM, GRANTEE ORGANIZATION, UEI, and FAIN. To the right of the card is an 'Edit Report Settings' link and a '9/1406' indicator. Below the card, there are tabs for 'All Reports', 'FFR', and 'PPR'. The 'All Reports' tab is active, showing a section for 'Past Reporting Periods'. A table lists reports with columns: TYPE, DUE DATE, REPORTING PERIOD, STATUS, and ACTIONS. The first row is a 'Quarterly PPR' with a due date of '01/10/2024 - Due about 1 month ago' and a reporting period of '10/01/2023 - 12/31/2023'. Its status is 'Not Started', and the 'Start Report' button in the actions column is highlighted with a red box. The second row is a 'Quarterly FFR' with a due date of '01/30/2024 - Due 23 days ago' and the same reporting period, also with a 'Not Started' status and a 'Start Report' button.

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	01/10/2024 – Due about 1 month ago	10/01/2023 - 12/31/2023	Not Started	Start Report
Quarterly FFR	01/30/2024 – Due 23 days ago	10/01/2023 - 12/31/2023	Not Started	Start Report

Figure 7: Manage Reports screen with Not Started status and Start Report button

2. The “Performance Progress Report” screen appears. The PPR is divided into several easy to use sections that are combined into a standard format when downloaded or printed. Additionally, to avoid loss of information, the PPR automatically saves as Grantors enter data.

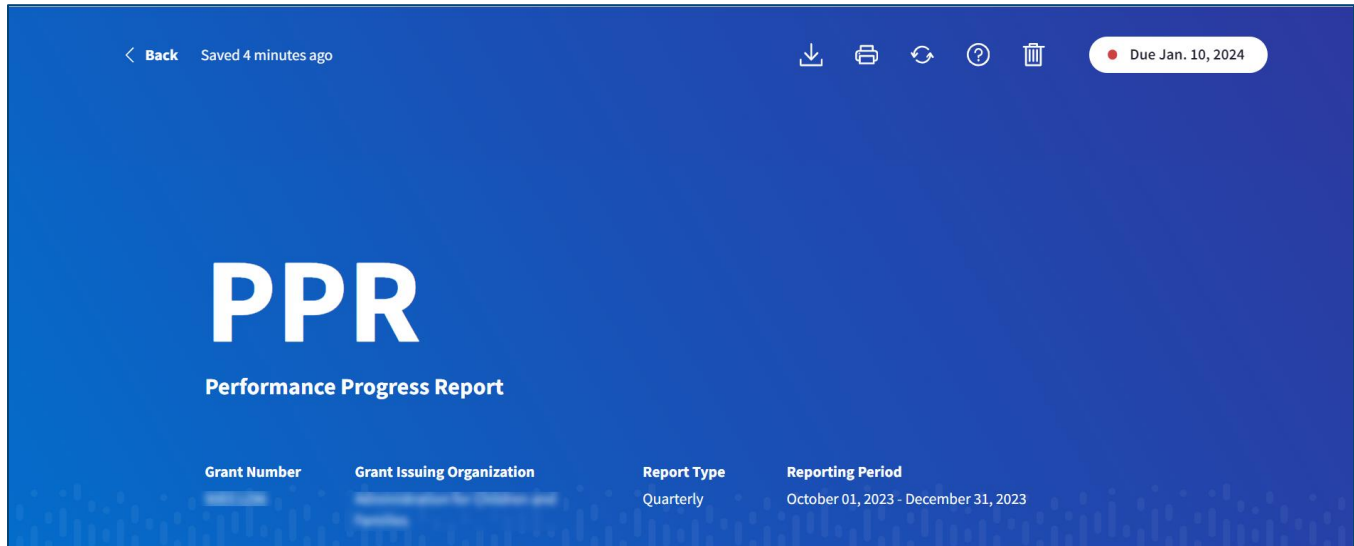


Figure 8: Performance Progress Report screen

The top of the screen contains information about the form, Grant Project, and actions. The PPR header line located at the top of the screen is always visible, even as Grantors scroll through the report and enter data. This header line contains the following:






- a. **Back button:** Click to return to the “Reports List” screen
- b. **Saved status:** Last saved time (i.e., 3 minutes ago, 7 days ago, etc.)
- c. **Tool-bar:**
 - i.  Download a zip file with the PDF version of the PPR and any attachments
 - ii.  Printer-friendly version of the report (prints what is on the screen)
 - iii.  Reset the form and remove all data entered by the Grant Recipient
 - iv.  Open the “More Information” page containing PPR instructions
 - v.  Delete the form (**Note:** This feature is only available for PPRs that are *In Progress*; a PPR form outside of this status does not have this feature)
- d. **Due Date:** The date the report is due to the Federal agency



Figure 9: PPR header line

3. Scroll down the page to begin entering report data.

The left side of the screen describes the purpose of a section and any instructions. For example,

in the *Review your report details*, Grantors are instructed to verify the pre-filled data and to enter additional information in the appropriate fields as required.

The right side of the screen contains pre-filled information and open fields where data can be entered. Pre-filled information is generally read-only when followed by the lock (🔒) icon.

Click an **information** (ℹ️) icon for more details about that field.

Back Saved 5 minutes ago

Due Jan. 10, 2024

1. Grant Issuing Organization	Administration for Children and Families	🔒
2. Grant Number	10001000	🔒
3a. UEI	10001000	🔒
3b. EIN	10001000	🔒
4. Organization Name	HEALTHCARE SERVICES, INC.	🔒
5. Organization Address	10001000 St. Thomas, VI 00000	🔒
6. Project Period	09/30/2022 — 09/29/2025	🔒
7. Reporting Period	10/01/2023 — 12/31/2023	🔒
8. Report Type	Quarterly	🔒

Figure 10: PPR Review your report details section

4. Scroll to the *Report on Your Performance* section and provide a performance narrative in the **Start typing** field. There is a 2000 character limit for narratives provided.

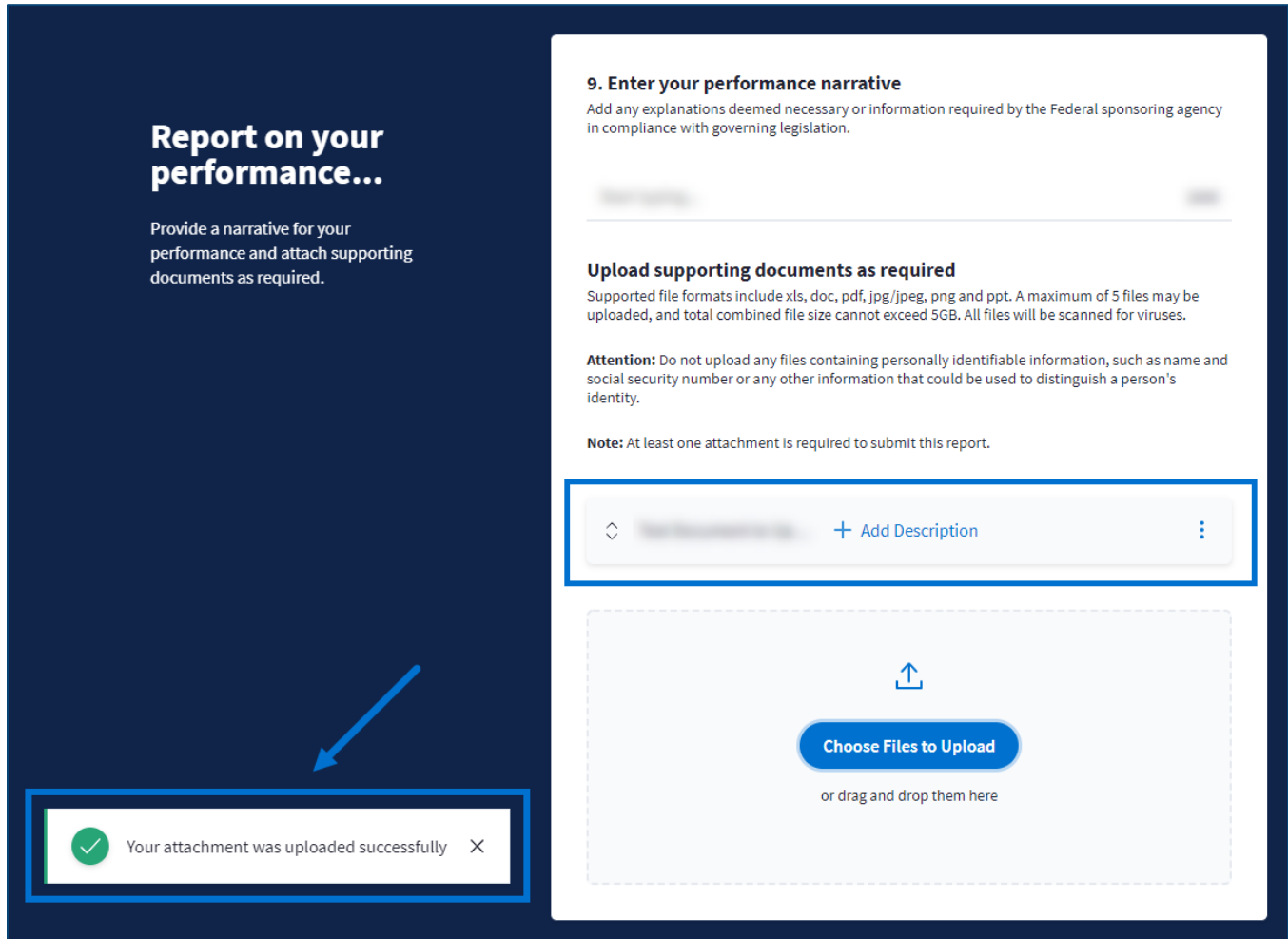
To add an attachment, either select a file by clicking the **Choose Files to Upload** button or **drag and drop** a file from your computer to the PPR *Add Attachments* box. Attachments must follow the requirements listed below:

- Supported file formats include xls, doc, pdf, jpg/jpeg, png and ppt
- A total of 5 files may be uploaded, and the combined file size cannot exceed 5GB
- 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

The screenshot displays the 'Report on your performance...' section of the PPR interface. On the left, a dark blue sidebar contains the title 'Report on your performance...' and a sub-instruction: 'Provide a narrative for your performance and attach supporting documents as required.' The main content area is white and titled '9. Enter your performance narrative'. Below the title, it states: 'Add any explanations deemed necessary or information required by the Federal sponsoring agency in compliance with governing legislation.' A text input field with the placeholder 'Start typing...' is highlighted with a red box, and a character count '2000' is shown in a blue box to its right. Below this, the section 'Upload supporting documents as required' is shown, with instructions: '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.' An 'Attention' note follows: '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.' A 'Note' states: 'At least one attachment is required to submit this report.' At the bottom, there is a large dashed box containing an upload icon (an arrow pointing up) and a blue button labeled 'Choose Files to Upload', which is highlighted with a red box. Below the button, the text 'or drag and drop them here' is visible.

Figure 11: PPR screen with performance narrative line and Choose Files to Upload button

5. After uploading an attachment, the attachment appears. Simultaneously, a “Your attachment was uploaded successfully” message appears in the lower-left corner of the screen. Add additional attachments as needed.



The screenshot displays the 'Report on your performance...' section on a dark blue background. A white notification box in the bottom-left corner, highlighted with a blue border and a blue arrow, contains a green checkmark icon and the text 'Your attachment was uploaded successfully' with a close button (X). To the right, the '9. Enter your performance narrative' section is visible, including a text area for the narrative, a section for 'Upload supporting documents as required' with file format details and a 5GB limit, and a 'Choose Files to Upload' button. A blue-bordered box highlights the 'Add Description' link and a menu icon in the document upload area.

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.

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.

+ Add Description

Choose Files to Upload

or drag and drop them here

✓ Your attachment was uploaded successfully ✕

Figure 12: PPR screen with Your attachment was uploaded successfully message

6. In the attachment row, include a description of the attachment by clicking the **Add Description** button.

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.

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.

+ Add Description

Choose Files to Upload

or drag and drop them here

Figure 13: PPR screen with Add Description button

7. On the “Add Description” screen, enter text in the **Enter description** field within the 200 character limit. Click the **Done** button to save and close the screen.

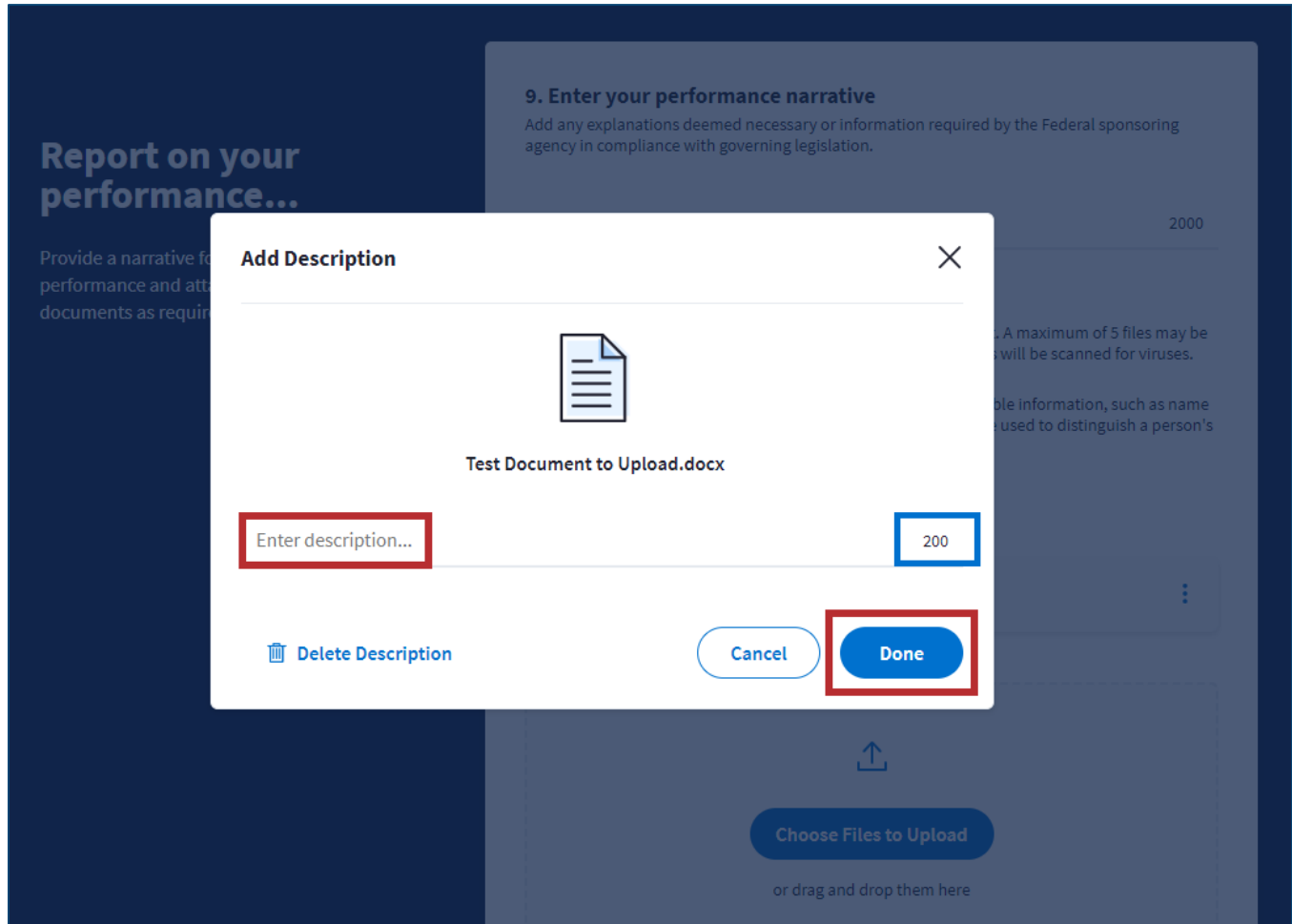
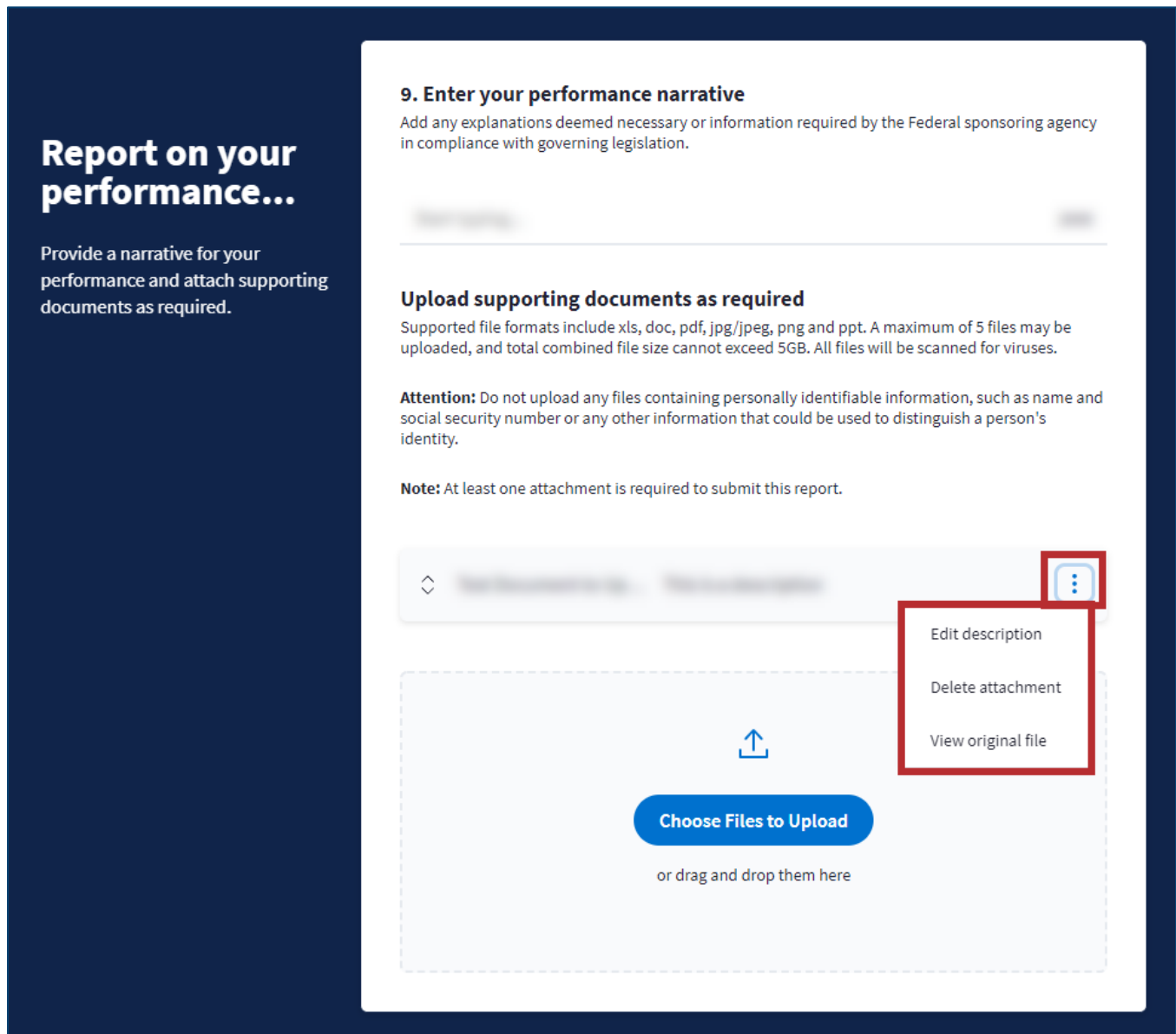


Figure 14: PPR screen with Add Description screen with Enter description line and Done button

8. The “Performance Progress Report” screen reappears, and the description is viewable. Click the **Actions List icon (three vertical dots)** to perform additional functions:
- **Edit description:** Change the description of the attachment.
 - **Delete attachment:** Remove the attachment and any description.
 - **View original file:** View the contents of the attachment.



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.

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.

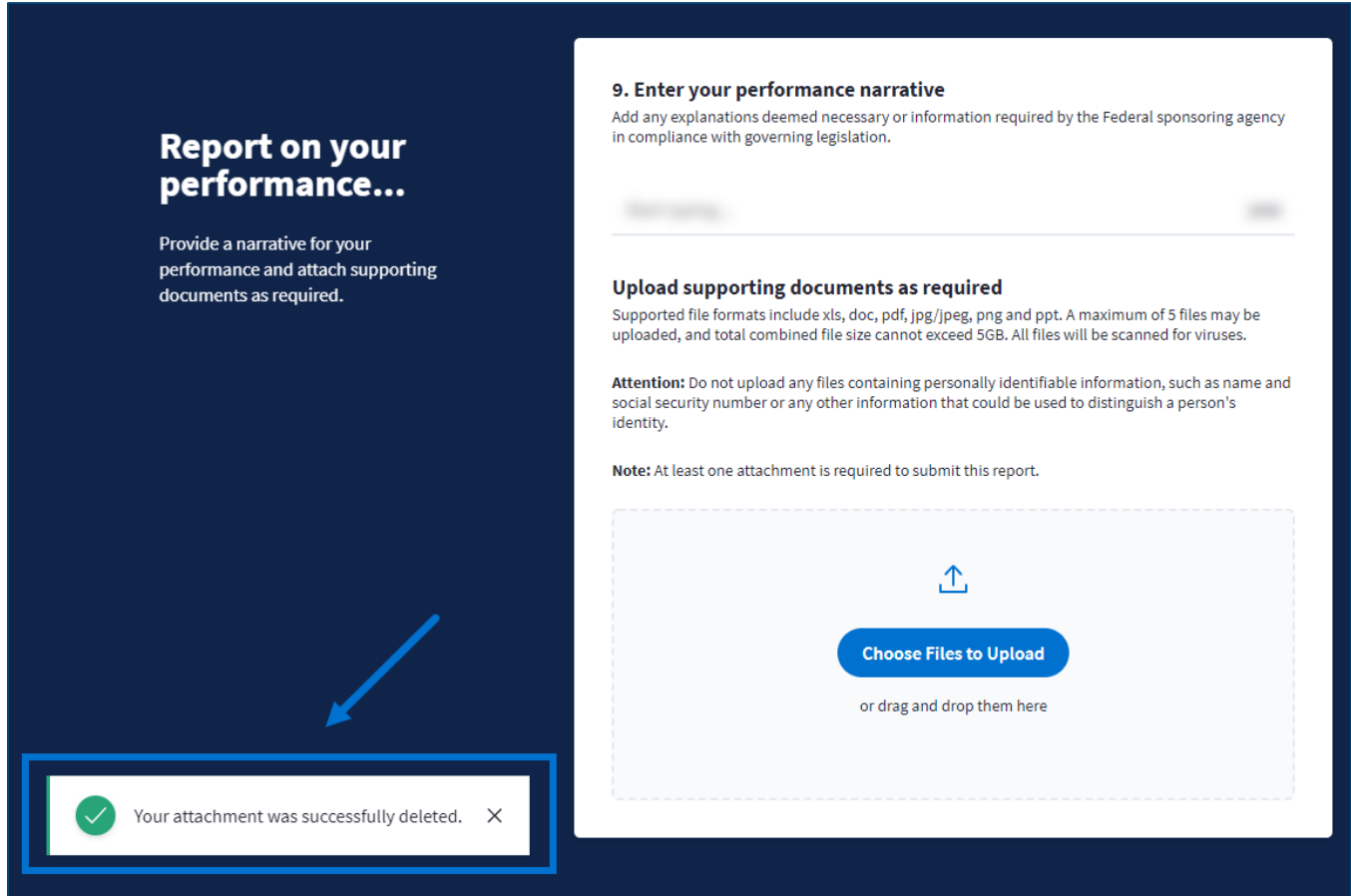
Choose Files to Upload
or drag and drop them here

Actions List icon (three vertical dots)

- Edit description
- Delete attachment
- View original file

Figure 15: PPR screen with ellipsis button options

Note: After deleting an attachment, the “Your attachment was successfully deleted” message displays in the lower-left corner of the screen.



The screenshot shows a dark blue sidebar on the left with the heading "Report on your performance..." and a subtext "Provide a narrative for your performance and attach supporting documents as required." A blue arrow points from this section to a white notification box in the bottom-left corner. The notification box contains a green checkmark icon and the text "Your attachment was successfully deleted." with a close button (X). The main content area on the right is titled "9. Enter your performance narrative" and includes instructions for adding explanations. Below this is a section for "Upload supporting documents as required" with supported file formats and a maximum file size of 5GB. A "Choose Files to Upload" button is visible, along with a note that at least one attachment is required.

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.

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

✓ Your attachment was successfully deleted. ✕

Figure 16: PPR screen with Your attachment was successfully deleted message

9. Scroll to the *Finish and Submit* section. Review and verify that all information is accurate. Certify and sign the form, and click the **Submit Report** button.

Note: The **Submit Report** button will only display if at least one attachment is included with the form.

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

Enter full name.....

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

Submit Report

Figure 17: PPR screen Certification line and Submit Report button

10. The “Successfully submitted Performance Progress Report” message appears. To return to the “Reports List” screen, click the **Back** button.

< Back Saved less than a minute ago

Due Sep. 11, 2019

or drag and drop them here

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

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

Figure 18: PPR screen with Successful message and Back button

11. “Manage Reports” screen appears and the PPR status is *Submitted*. The report can be viewed at any time and the workflow status tracked from the *Status* button.

Note: The *Status* button indicates the Grantor submitted the report.

The screenshot shows the 'Manage Reports' interface. At the top, there's a header with 'Back to search' and 'Manage Reports'. Below this is a summary card for 'WHEELING South Central Adult Day Programming Project' with fields for GRANT PROGRAM, GRANTEE ORGANIZATION, UEI, and FAIN. To the right of the card is an 'Edit Report Settings' link and a vertical scroll indicator showing '9/1406' items. Below the card, there are tabs for 'All Reports', 'FFR', and 'PPR'. The 'All Reports' tab is active, showing a section for 'Past Reporting Periods'. This section contains a table with two rows of reporting data. The first row, 'Quarterly PPR', has a status of 'Submitted' (highlighted with a blue box) and a 'View Report' button (highlighted with a red box). The second row, 'Quarterly FFR', has a status of 'Not Started' and a 'Start Report' button.

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	01/10/2024 – Due about 1 month ago	10/01/2023 - 12/31/2023	Submitted	View Report
Quarterly FFR	01/30/2024 – Due 23 days ago	10/01/2023 - 12/31/2023	Not Started	Start Report

Figure 19: Manage Reports screen with Submitted status and View Report button

The Recipient receives an email notification when a report is submitted. Recipients click the **View Report** button to view the report.

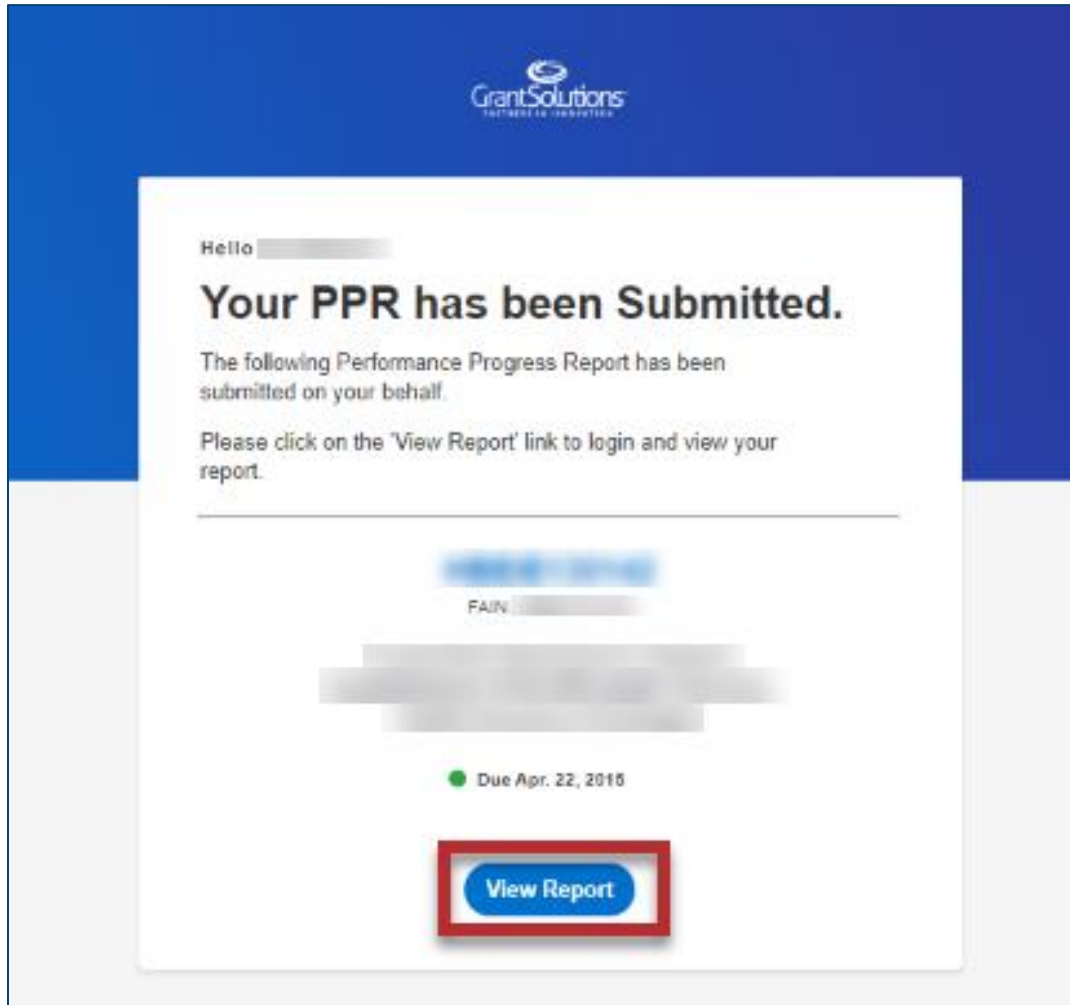


Figure 20: Submitted notification email with View Report button