



# GrantSolutions User Guide

## Grant Recipient Process: Performance Progress Report

## Table of Contents

<b>INTRODUCTION .....</b>	<b>1</b>
ROLES AND ACTIONS.....	1
PERFORMANCE PROGRESS REPORT STATUSES.....	1
NOTIFICATIONS .....	2
<b>NAVIGATION.....</b>	<b>3</b>
ACCESS PERFORMANCE PROGRESS REPORTS.....	3
NEW EXPERIENCE.....	3
CLASSIC EXPERIENCE .....	7
REPORTING PERIOD GROUP FEATURES.....	11
<b>COMPLETE AND SUBMIT PERFORMANCE PROGRESS REPORT .....</b>	<b>14</b>
<b>RETURNED PERFORMANCE PROGRESS REPORT.....</b>	<b>25</b>
EDIT RETURNED PERFORMANCE PROGRESS REPORT .....	27

## INTRODUCTION

GrantSolutions provides comprehensive management of Performance Progress Reports (PPRs) for Grantors and Grant Recipients. Federal Program staff schedule report cycles and determine due dates. Grant Recipients view, manage, and electronically submit PPRs in GrantSolutions.

PPRs are submitted 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

Grant Recipients with the following roles can **view**, **edit**, and **submit** the PPR:

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

Grant Recipients with the Financial Support Staff role can **edit** and **view** the PPR but not submit. The PPR is read-only for all other roles.

## PERFORMANCE PROGRESS REPORT STATUSES

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

- *Not Started*: Grant Recipient has not entered any data in the report
- *In Progress*: Grant Recipient has entered data in the report and not yet submitted
- *Submitted*: Grant Recipient has submitted the report to the Grantor
- *Accepted*: Grantor has approved the report
- *Returned*: Grantor has returned the report to the Grant Recipient for edits
- *Withdrawn*: Grant Recipient has withdrawn the report for edits
- *No Data Available*: No data is available for the report

The table below details possible actions based on the workflow status and the user's GrantSolutions role.

Table # 1

Workflow Status	Possible Grant Recipient Actions
<b>Not Started</b>	Start Report
<b>In Progress</b>	Edit Report, Print, Download (PDF)
<b>Submitted</b>	View Report, Print, Download (PDF)
<b>Accepted</b>	View Report, Print, Download (PDF)
<b>Returned</b>	Edit Report, Print, Download (PDF)
<b>Withdrawn</b>	Edit Report, Print, Download (PDF)
<b>No Data Available</b>	None

## NOTIFICATIONS

Grant Recipients that can edit 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
- When the PPR is returned by the Grantor for changes
- When the PPR is accepted by the Grantor

## NAVIGATION

Access PPR forms from either the New Experience of GrantSolutions or the Classic Experience of GrantSolutions. All PPRs for a Grant Project are grouped by the Current Reporting Period, Past Reporting Periods, and Upcoming Reporting Periods.

### ACCESS PERFORMANCE PROGRESS REPORTS

#### NEW EXPERIENCE

To access PPRs using the New Experience of GrantSolutions, perform the following steps:

1. On the “My Grants List” screen, navigate to the “Grant Details” screen by clicking the **arrow** button on the desired Grant Project card while in *Grid View*.

**Note:** Alternatively, click the **Grant Number** button in a Grant Project row while in *List View*.

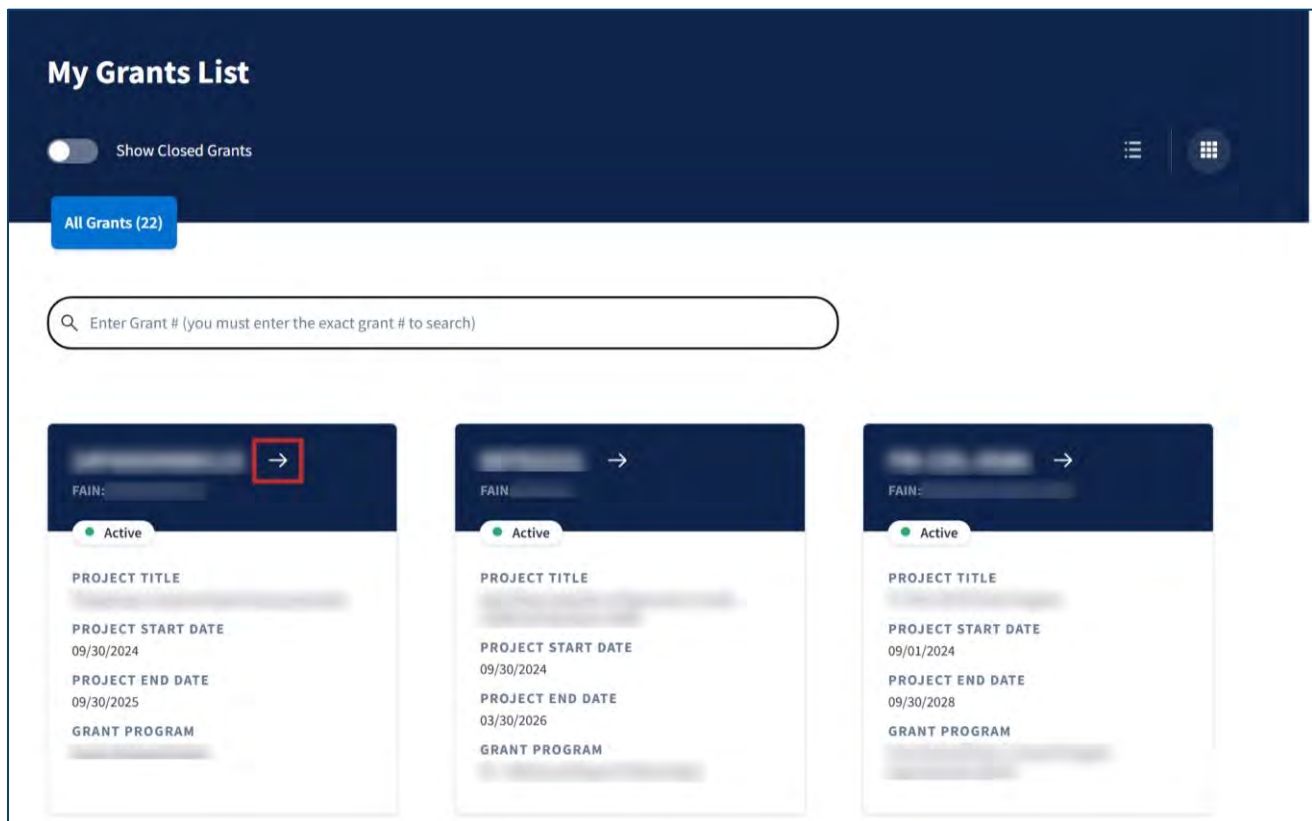


Figure 2: My Grants List screen with arrow button

- The “Grant Details” screen appears. To access both Federal Financial Reports (FFRs) and PPRs, click the **Reports** tab.

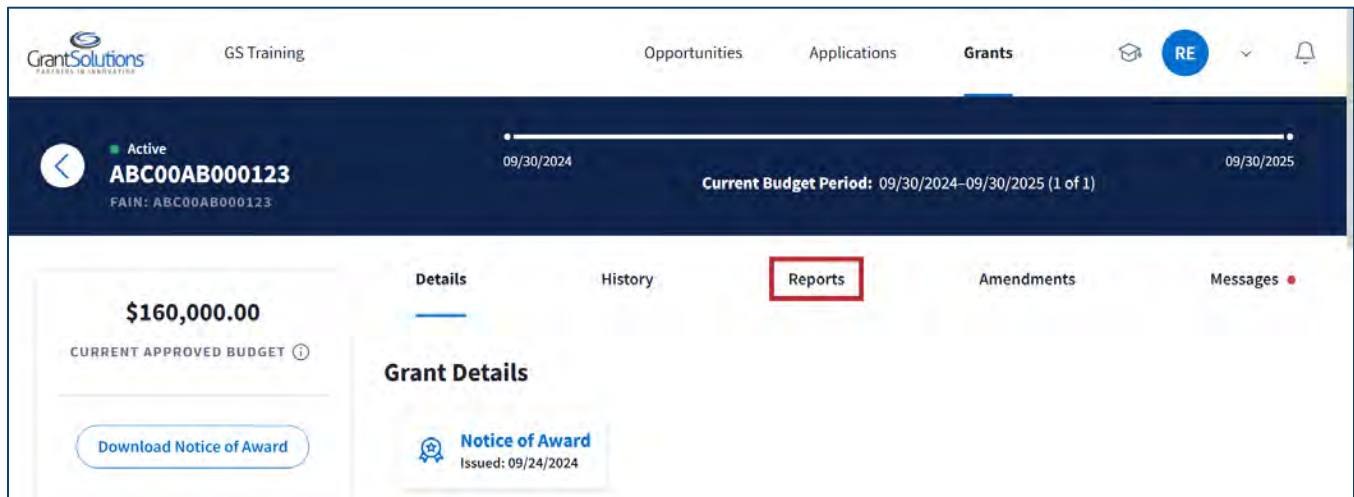


Figure 3: Grant Details screen with Reports tab

The *Reports* tab opens.

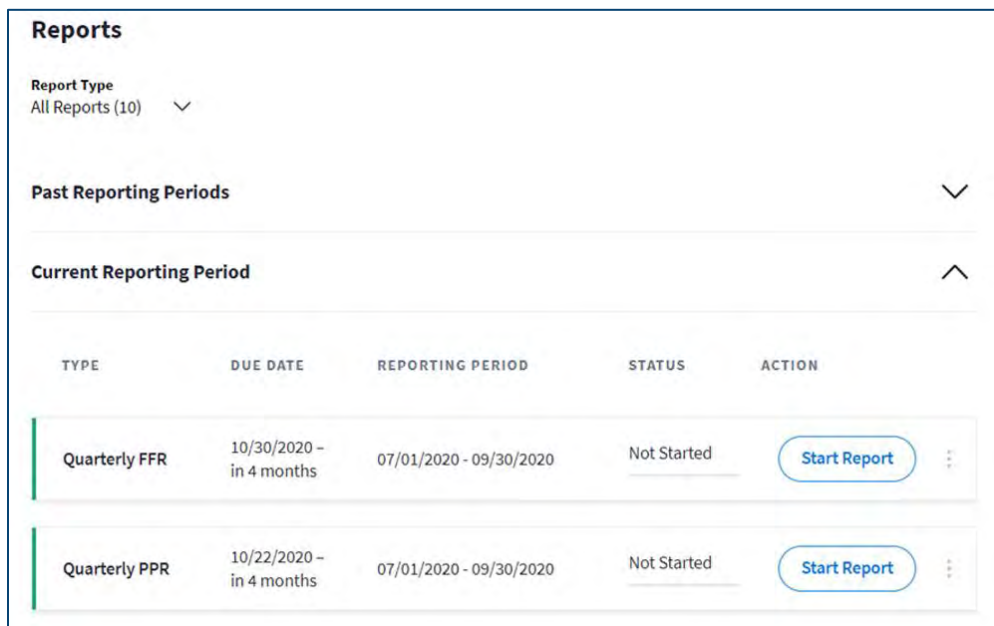
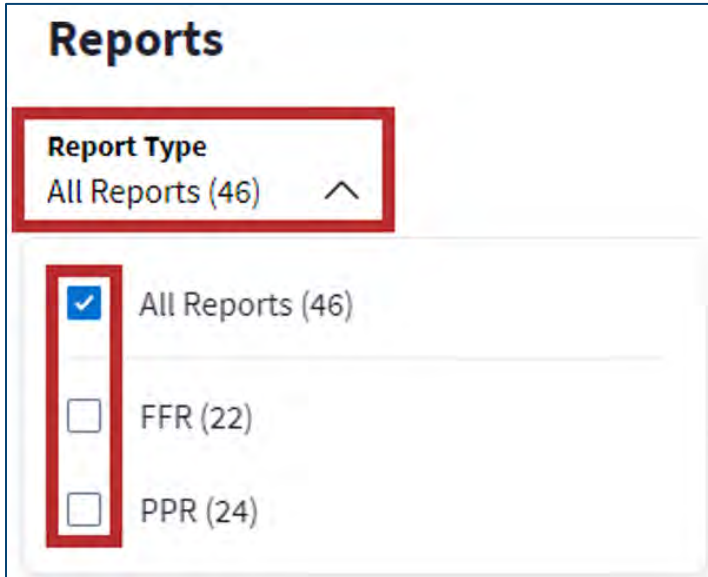


Figure 4: Reports tab

Click the **Report Type** drop-down to filter search results by *Report Type*.



The screenshot shows a web interface with a section titled "Reports". Inside this section, there is a "Report Type" drop-down menu. The menu is currently set to "All Reports (46)". Below the menu, there is a list of options: "All Reports (46)" (selected), "FFR (22)", and "PPR (24)". Red boxes highlight the "Report Type" label and the list of options.

Report Type	Count
All Reports	46
FFR	22
PPR	24

Figure 5: Report Type drop-down

Below the *Report Type* drop-down are three Reporting Period groups with both FFRs and PPRs: *Past Reporting Periods*, *Current Reporting Period*, and *Future Reporting Periods*. The *Current Reporting Period* group is expanded by default.

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.

### Reports

Report Type  
All Reports (10) ∨

Past Reporting Periods

∨

Current Reporting Period

∧

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTION
Quarterly FFR	10/30/2020 – in 4 months	07/01/2020 - 09/30/2020	Not Started	Start Report
Quarterly PPR	10/22/2020 – in 4 months	07/01/2020 - 09/30/2020	Not Started	Start Report

Future Reporting Periods

∨

Figure 6: Reports tab with Reporting Periods and up and down arrows



## CLASSIC EXPERIENCE

To access PPRs using the Classic Experience of GrantSolutions, perform the following steps:

1. On the “My Grants List” screen, click the **initials** drop-down.

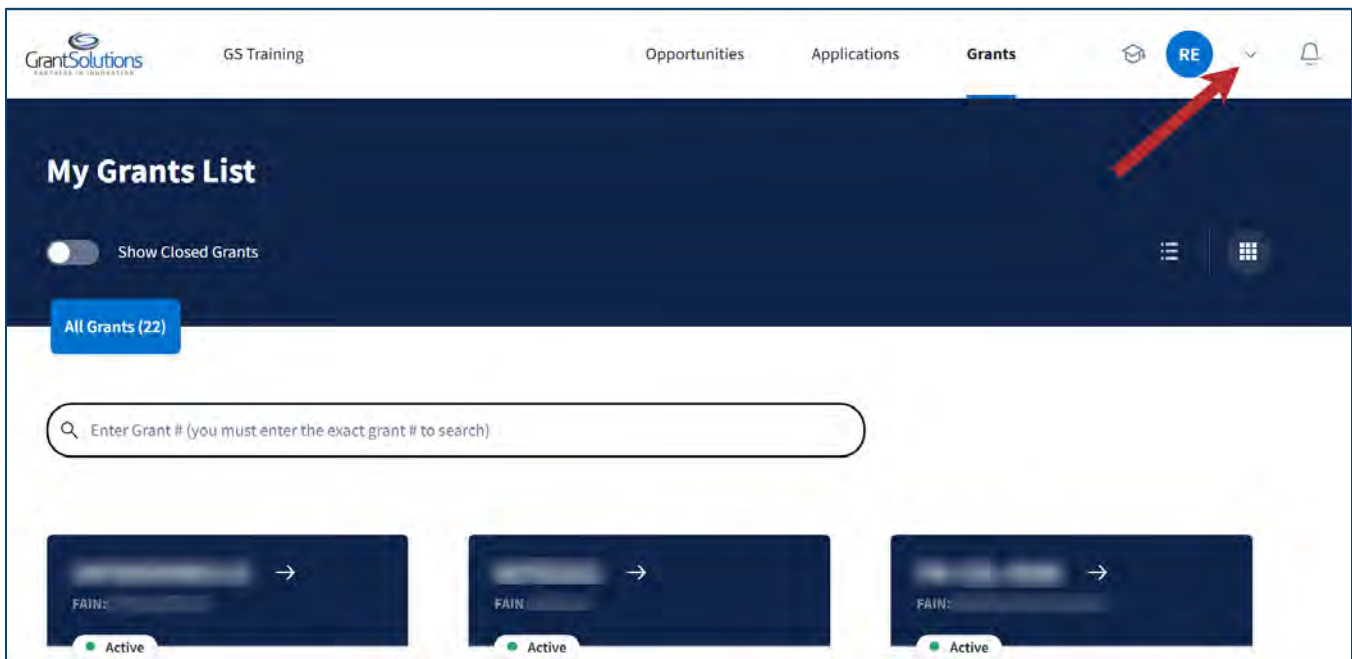


Figure 7: My Grants List screen with initials drop-down

2. In the *initials* drop-down, click the **Switch Back to Classic** hyperlink at the bottom.

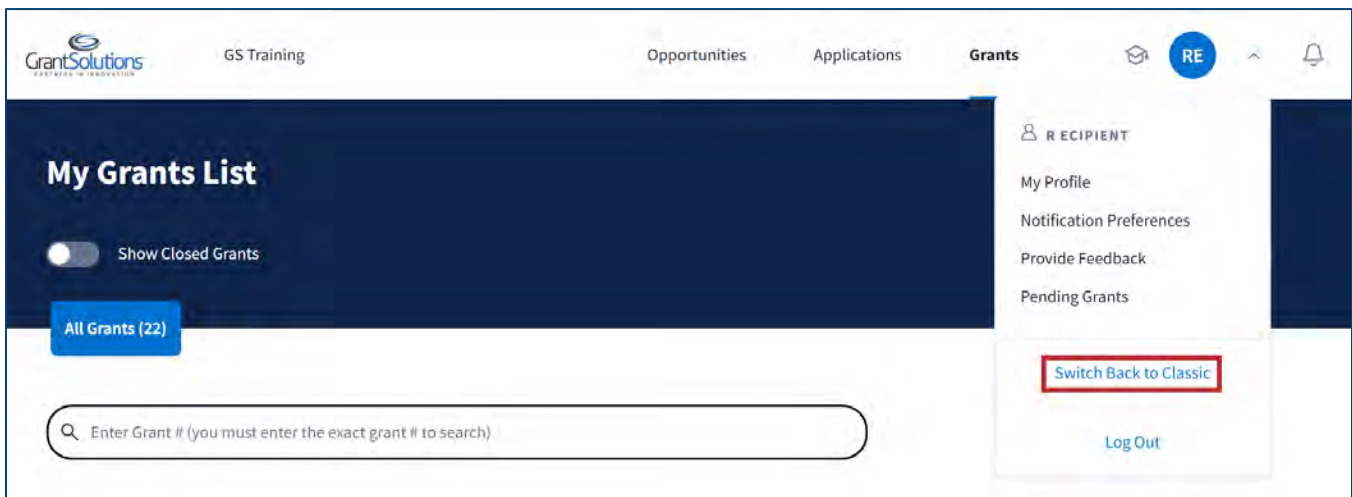


Figure 8: My Grants List screen with initials drop-down and Switch Back to Classic hyperlink

3. The “My Grants List” screen appears in the Classic Experience. Click the **Reports** link for the desired Grant Project to access both FFRs and PPRs.

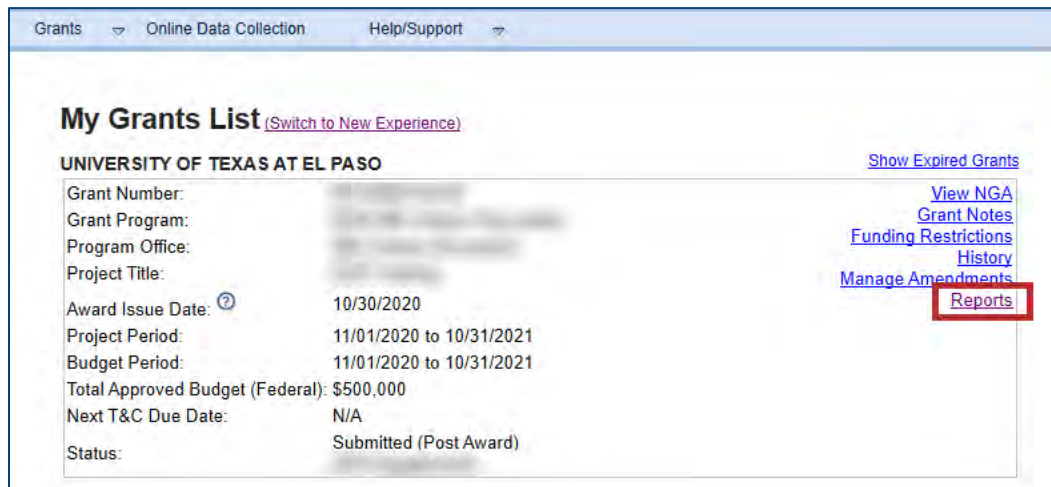


Figure 9: My Grants List screen with Reports hyperlink

The “Reports List” screen appears.

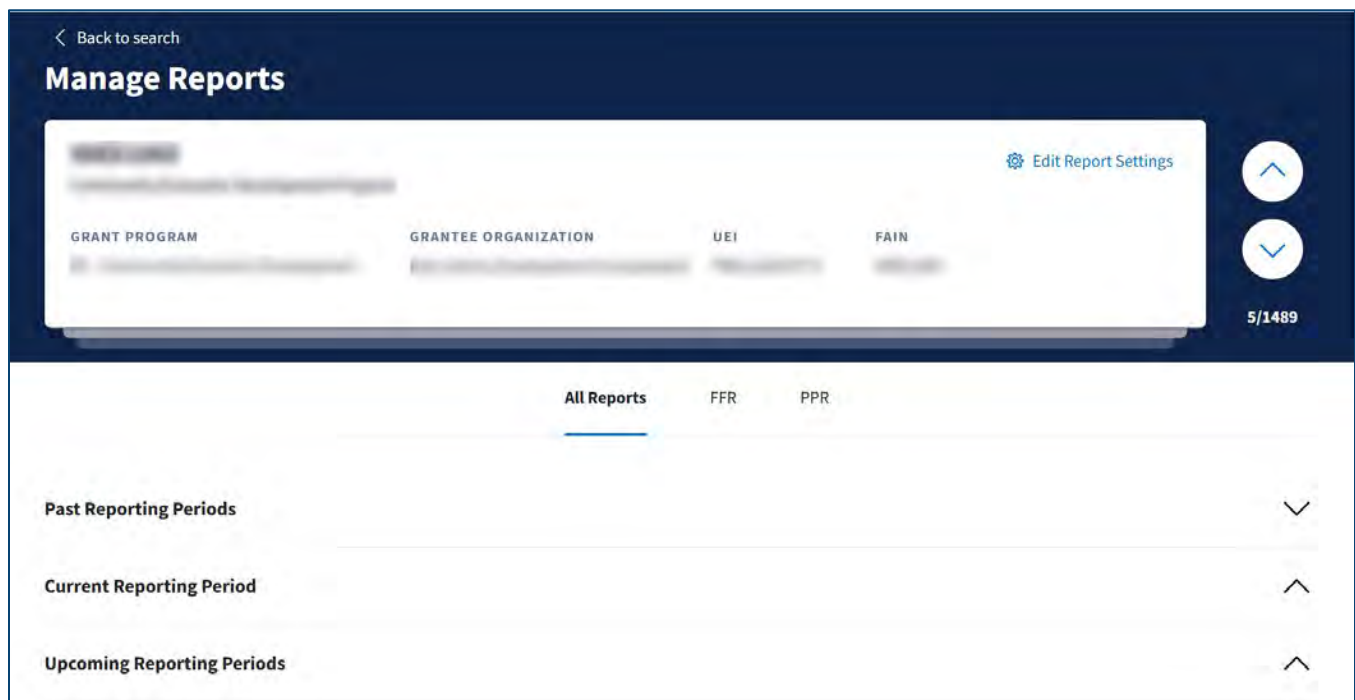
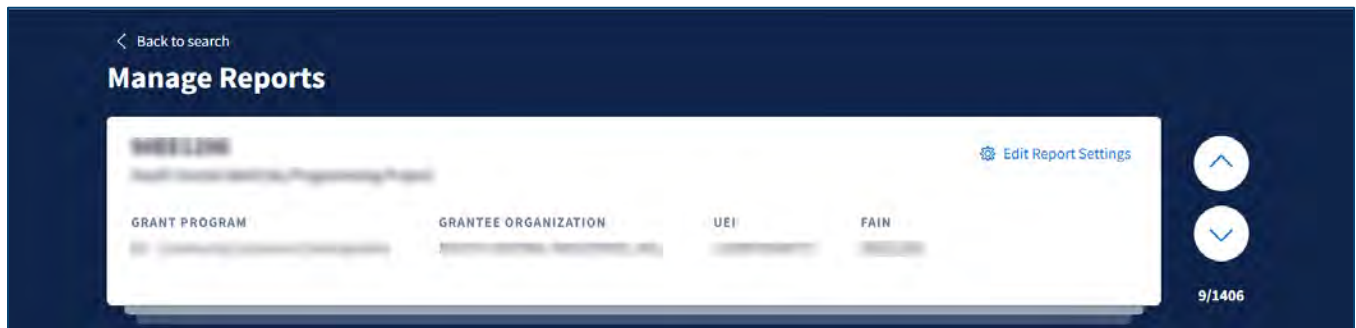


Figure 10: Reports List screen

The “Reports List” screen is divided into two sections – *Project Information* and *Reporting Periods*.

Project Information is located towards the top of the screen and includes the *Grant Number*, *Project Name*, *Grant Program*, *Grantee Organization*, *UEI*, and *FAIN*.



The screenshot shows the "Manage Reports" interface. At the top left is a "Back to search" link. The title "Manage Reports" is prominently displayed. Below the title, there is a section for "PROJECT INFORMATION" which includes fields for "GRANT PROGRAM", "GRANTEE ORGANIZATION", "UEI", and "FAIN". To the right of these fields is an "Edit Report Settings" link. On the far right, there are two circular buttons with up and down arrows, and a page indicator "9/1406".

Figure 11: Manage Reports screen

Below the *Project Information* section are three Reporting Period groups with both FFRs and PPRs: *Past Reporting Periods*, *Current Reporting Period*, and *Upcoming Reporting Periods*. The *Current Reporting Period* group is expanded by default.

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.

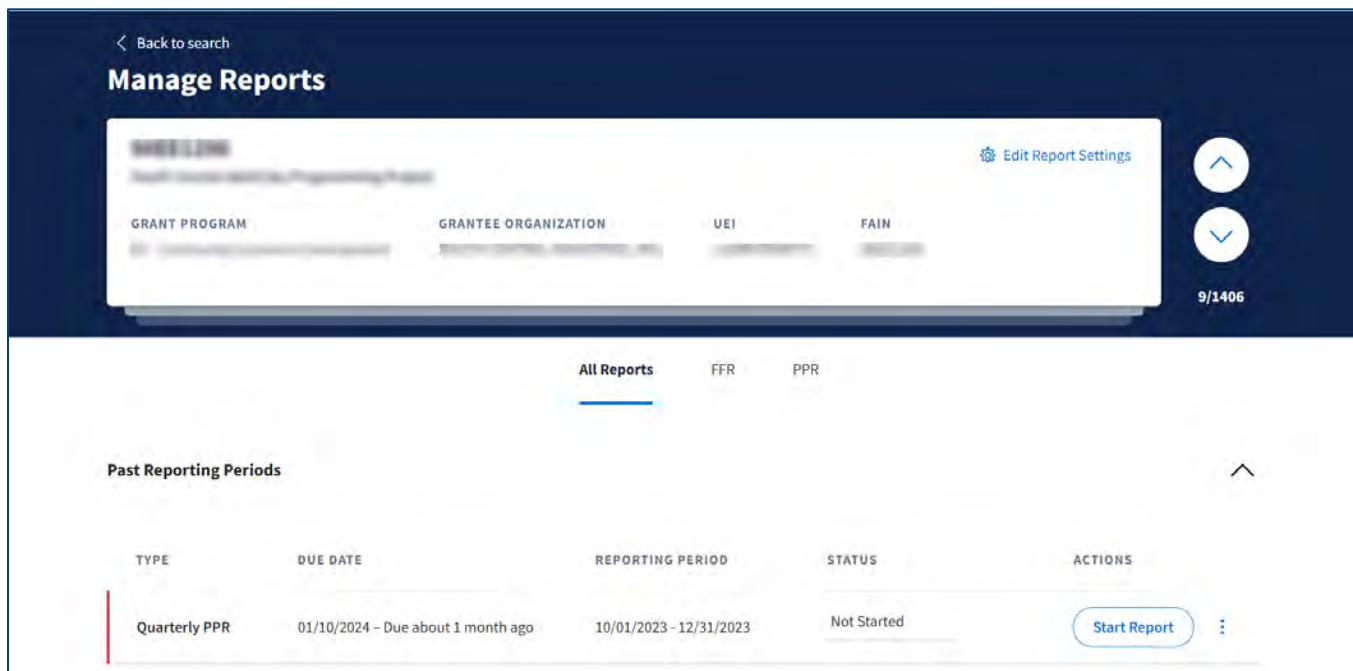
All Reports				
Past Reporting Periods <span>∨</span>				
Current Reporting Period <span>∧</span>				
TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Semi-Annual PPR	03/12/2020 – Due in 29 days	01/01/2020 – 06/30/2020	Not Started	View Report
Upcoming Reporting Periods <span>∨</span>				

Figure 12: Reports List screen with Reporting Periods and up and down arrows

## REPORTING PERIOD GROUP FEATURES

On the *Reports* tab of the “Grant Details” screen in the New Experience, and on the “Reports List” screen in the Classic Experience, information appears in each Reporting Period group. Each Reporting Period group contains the following information:

- *Type*: Quarterly, Semi-Annual, Annual, and Final depending on the Federal agency’s reporting requirements.
- *Due Date*: Displays the report due date and includes a countdown. Start, edit, and submit reports even after the due date has passed.
- *Reporting Period*: The reporting timeframe.
- *Status and Workflow History*: Current PPR workflow status. Click the **Status** button (i.e., Not Started, In Progress, Submitted, Accepted, etc.) to view the workflow history and any comments on the “PPR Reporting Workflow History” screen.



Manage Reports

Back to search

GRANT PROGRAM: [REDACTED]

GRANTEE ORGANIZATION: [REDACTED]

UEI: [REDACTED]

FAIN: [REDACTED]

Edit Report Settings

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	Start Report

Figure 13: Reports List screen

- For any *Submitted* actions on the “PPR Reporting Workflow History” window, click the **View Submission** button to download that version of the report.

**Note:** Submitted reports that are migrated data from the Grants Management Module (GMM) do not have a *View Submission* option.

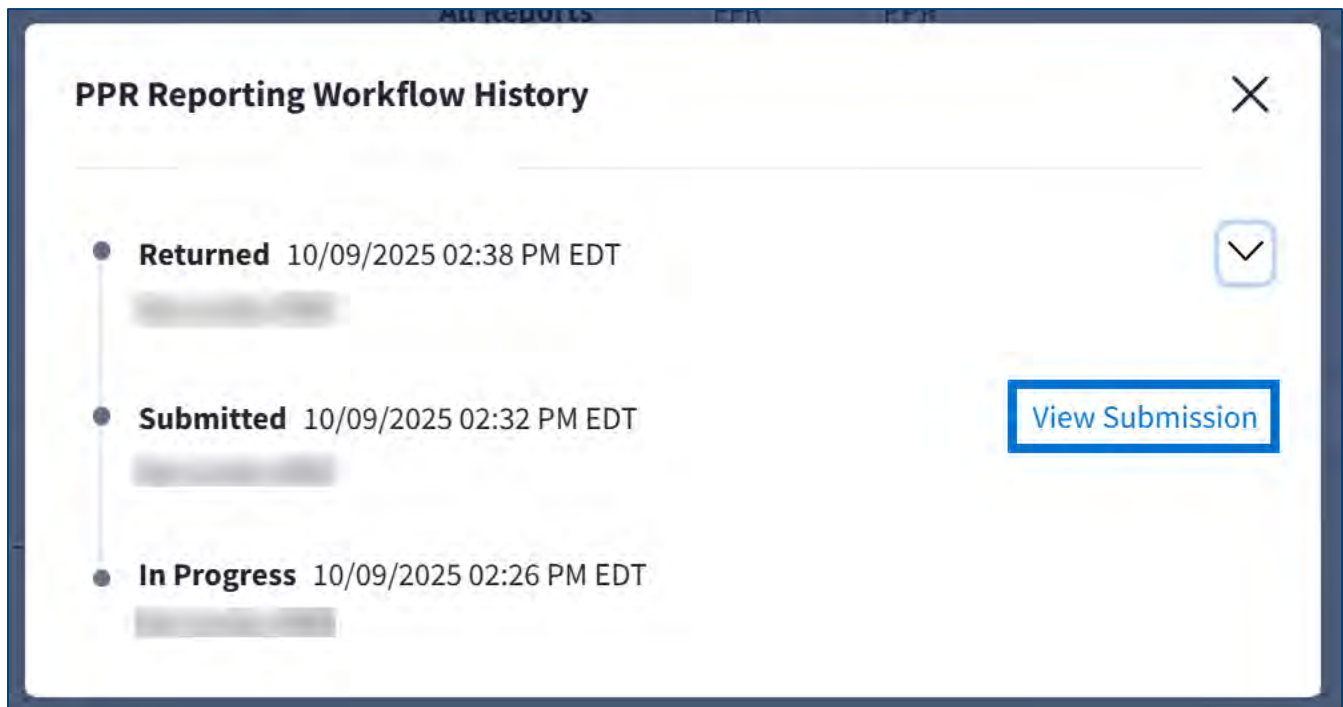


Figure 14: PPR Reporting Workflow History window with View Submission hyperlink

- Action button:** Action available to a user. May include *Start Report*, *Edit Report*, or *View Report*.

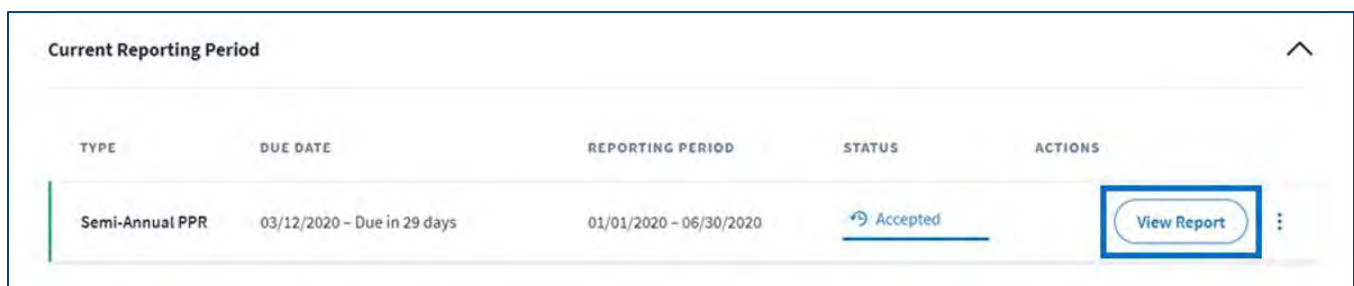


Figure 15: Actions column with View Report button



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

**Reports List**

GRANT PROGRAM: [blurred] GRANTEE ORGANIZATION: [blurred] DUNS: [blurred] FAIN: [blurred]

All Reports

Past Reporting Periods

Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Semi-Annual PPR	03/12/2020 – Due in 29 days	01/01/2020 – 06/30/2020	Accepted	<a href="#">View Report</a> <div> <div>⋮</div> <div>Print</div> <div>Download</div> </div>

Upcoming Reporting Periods

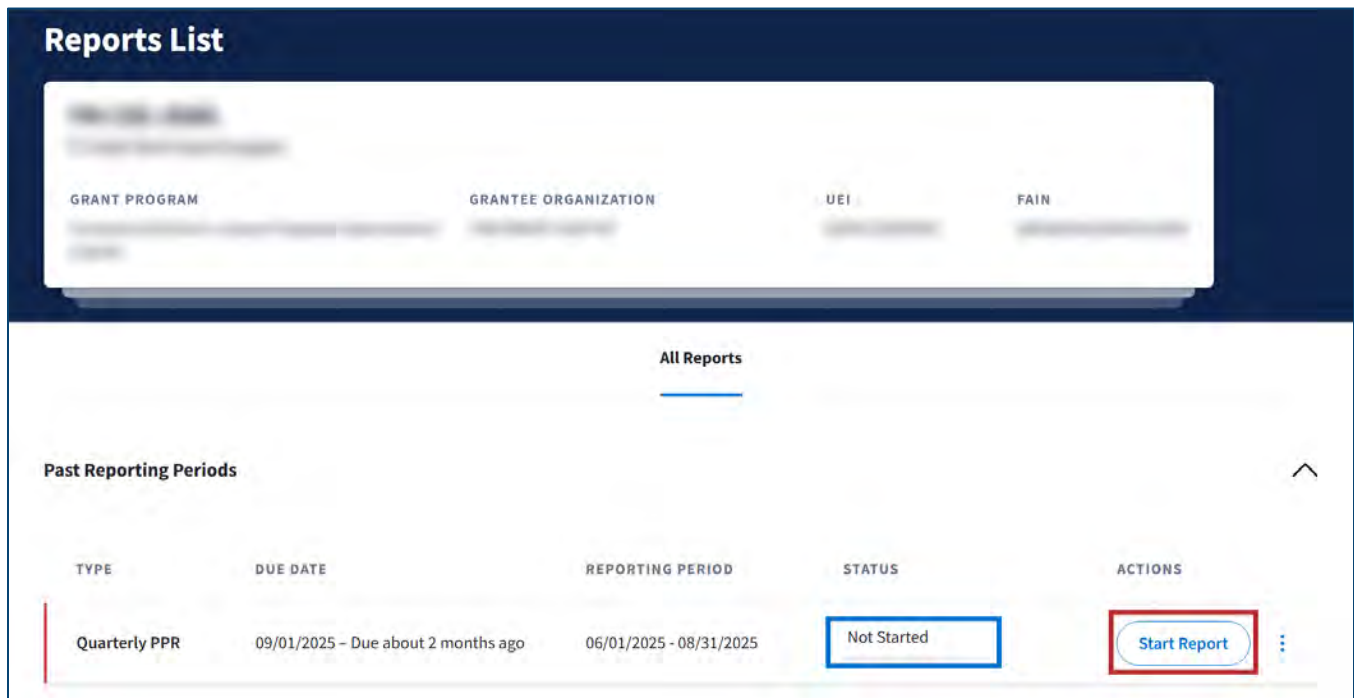
Figure 16: Reports List screen with Actions List icon drop-down

## COMPLETE AND SUBMIT PERFORMANCE PROGRESS REPORT

Grant Recipients can complete and submit PPR forms. Although PPRs can be submitted late, they are considered *Past Due*.

To complete and submit a PPR, perform the following steps:

1. Review the available reports on the *Reports* tab of the “Grant Details” screen in the New Experience, or on the “Reports List” screen in the Classic Experience. Select the desired PPR with the *Not Started* status and click the **Start Report** button.



The screenshot shows the 'Reports List' interface. At the top, there's a header with 'Reports List'. Below it, a summary card displays 'GRANT PROGRAM', 'GRANTEE ORGANIZATION', 'UEI', and 'FAIN'. The main section is titled 'All Reports' and contains a table for 'Past Reporting Periods'. The table has columns for TYPE, DUE DATE, REPORTING PERIOD, STATUS, and ACTIONS. One row is visible for a 'Quarterly PPR' with a due date of '09/01/2025 - Due about 2 months ago' and a reporting period of '06/01/2025 - 08/31/2025'. The status is 'Not Started', and the 'Start Report' button in the actions column is highlighted with a red box.

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	09/01/2025 - Due about 2 months ago	06/01/2025 - 08/31/2025	Not Started	Start Report

Figure 17: Reports List screen with Not Started Status and Start Report button



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

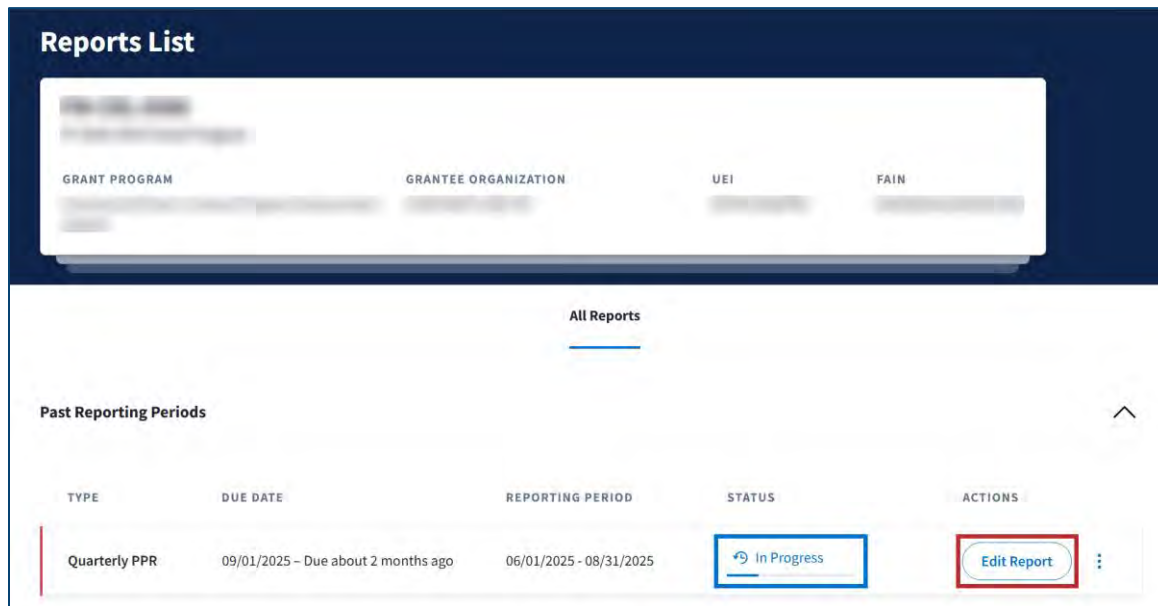


Figure 18: Reports List screen with In Progress Status and Edit Report button

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, the PPR automatically saves as Grant Recipients enter data.

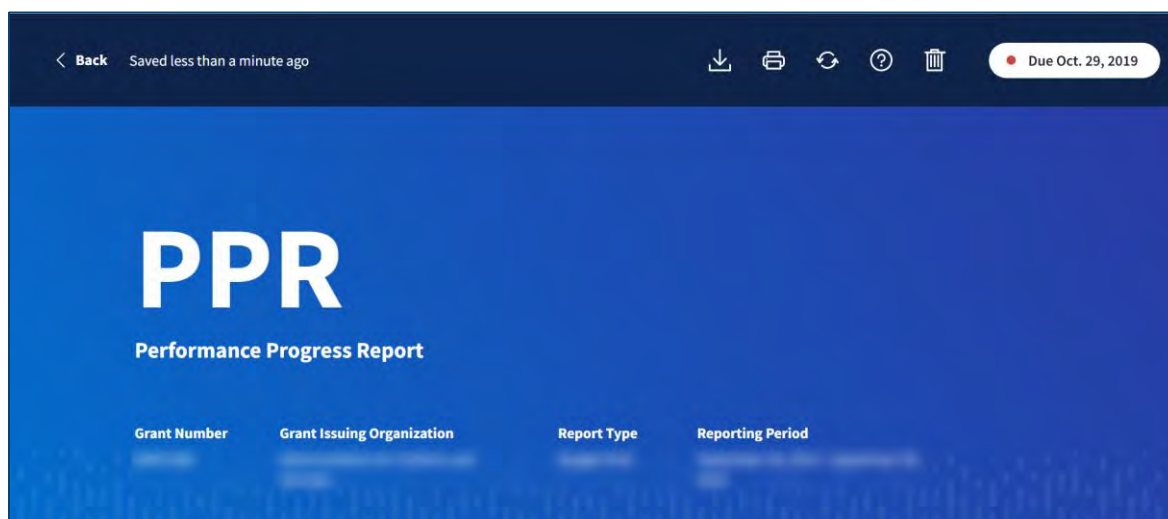


Figure 19: PPR screen

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 Grant Recipients scroll through the report and enter data. The 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:**
  - Download a zip file with the PDF version of the PPR and any attachments.
  - Print a printer-friendly version of the report (prints what is on the screen.)
  - Reset the form and remove all data entered by the Grant Recipient.
  - Open the “More Information” page containing PPR instructions.
  - 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).
  - **Due Date:** The date the report is due to the Federal agency.



Figure 20: PPR header line with *In Progress* Delete button included

- The right side of the screen contains pre-filled information. Pre-filled information is read-only when followed by the lock icon.

Due Jan. 10, 2024

1. Grant Issuing Organization

Department of Health and Human Services

2. Grant Number

10100123456789

3a. UEI

000000000000000000

3b. EIN

12-3456789

4. Organization Name

Department of Health and Human Services

5. Organization Address

Department of Health and Human Services

6. Project Period

09/30/2022 — 09/29/2025

7. Reporting Period

10/01/2023 — 12/31/2023

8. Report Type

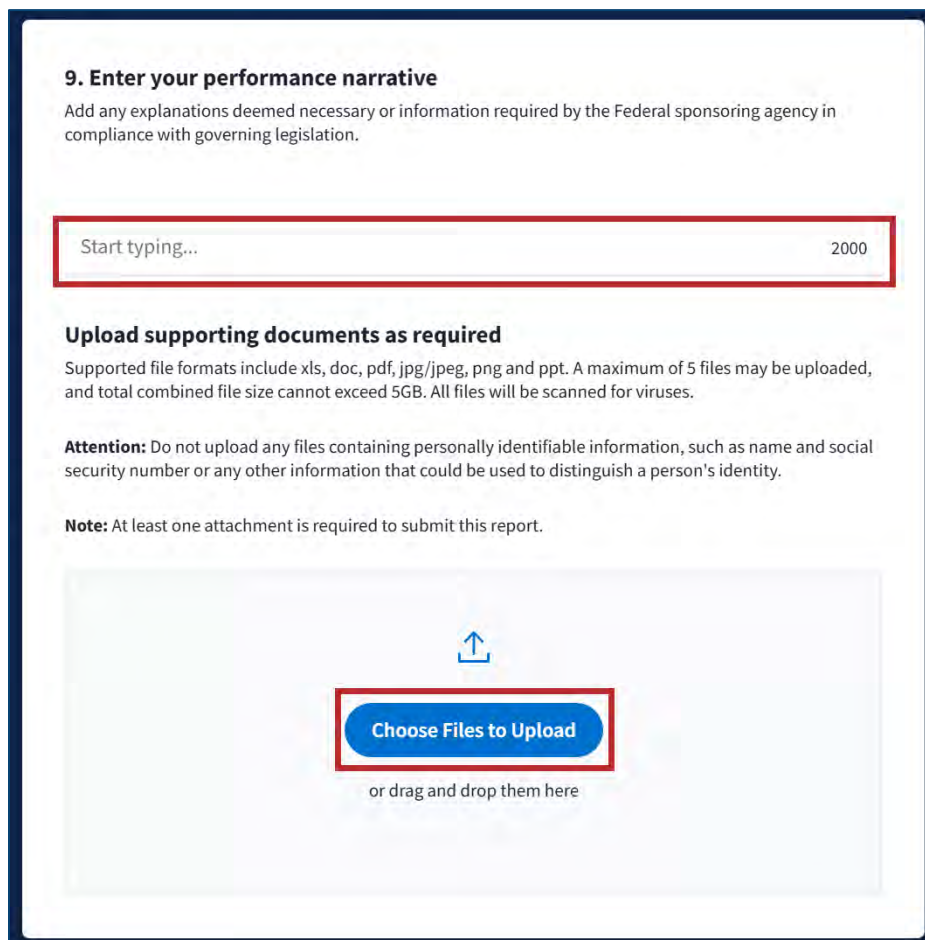
Quarterly

17

3. 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, social security number, nor any other information that could be used to distinguish a person's identity



The screenshot shows a web form titled "9. Enter your performance narrative". Below the title is a sub-header "Add any explanations deemed necessary or information required by the Federal sponsoring agency in compliance with governing legislation." followed by a text input field with the placeholder "Start typing..." and a character count "2000". Below this is a section titled "Upload supporting documents as required" with a paragraph of instructions. An "Attention:" note and a "Note:" are also present. At the bottom is a large light blue box containing an upload icon, a blue button labeled "Choose Files to Upload", and the text "or drag and drop them here".

**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

Figure 22: Performance Progress Report screen with Start typing field and Choose Files to Upload button

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

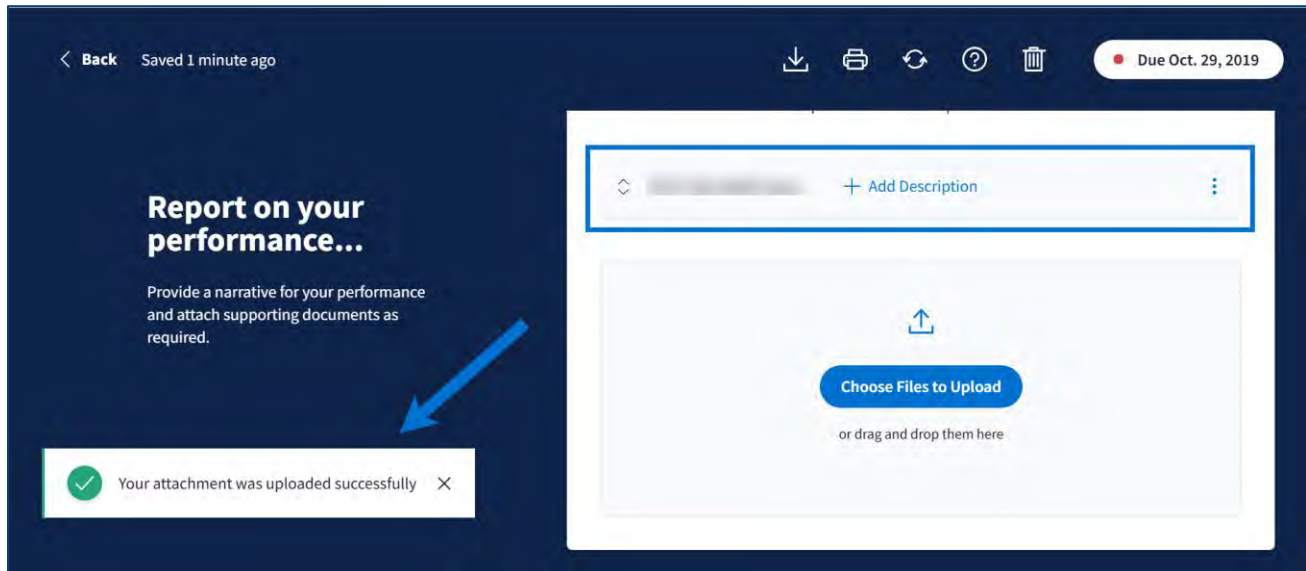


Figure 23: PPR screen with uploaded file and successful attachment message

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

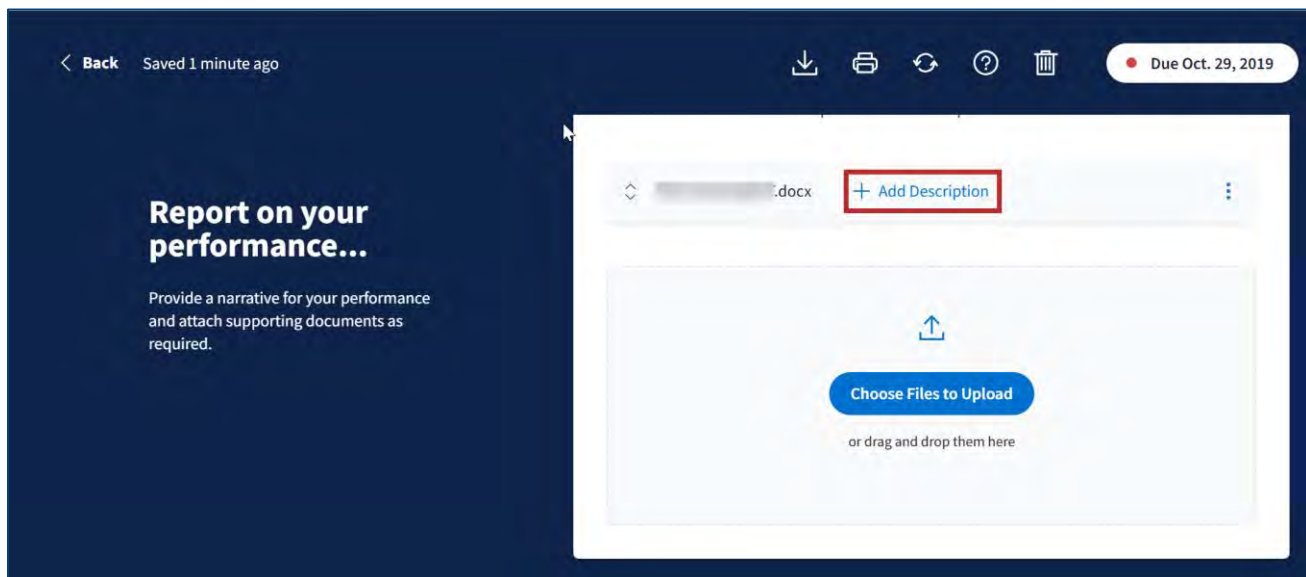


Figure 24: PPR screen with +Add Description button

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

**Note:** Click the *Delete Description* button to remove the description

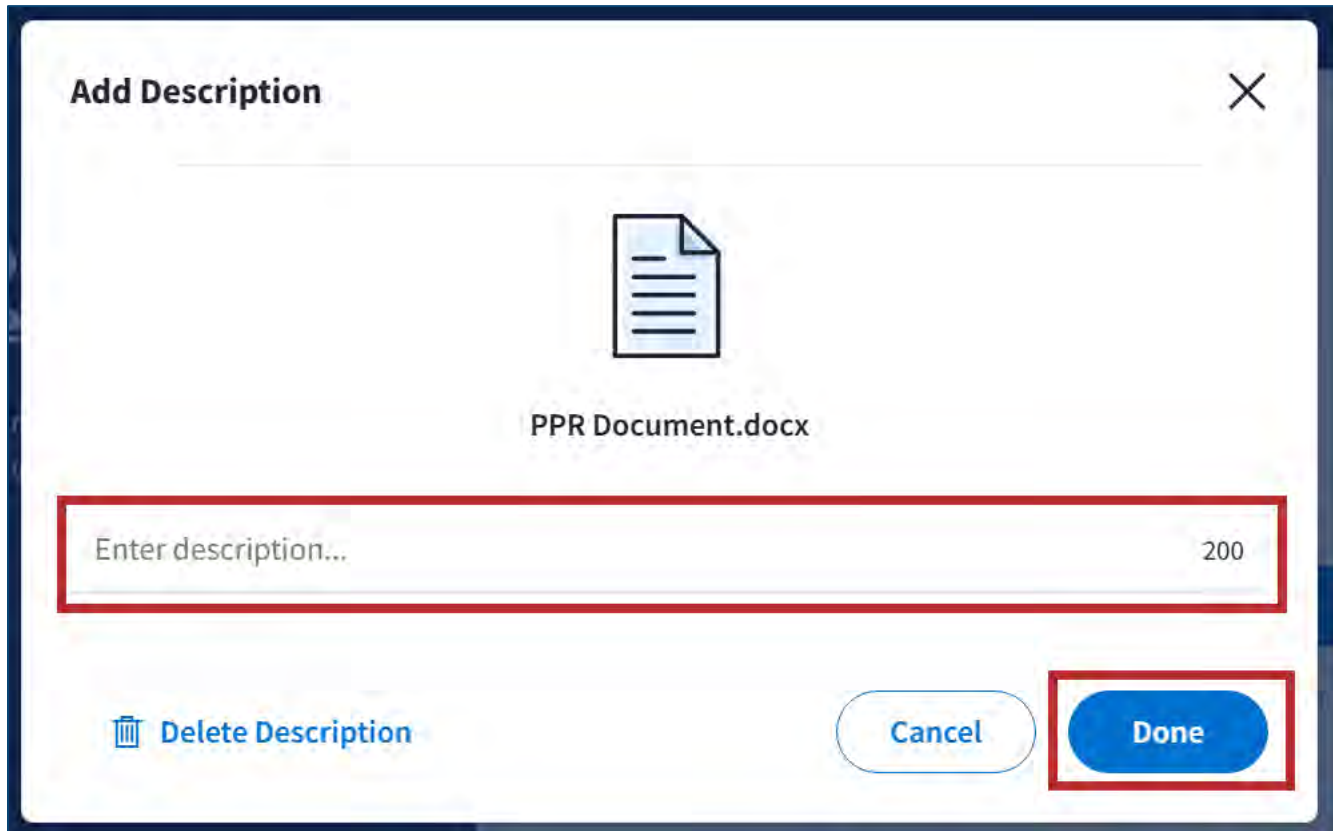


Figure 25: Add Description window with Enter Description field and Done button



6. 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.

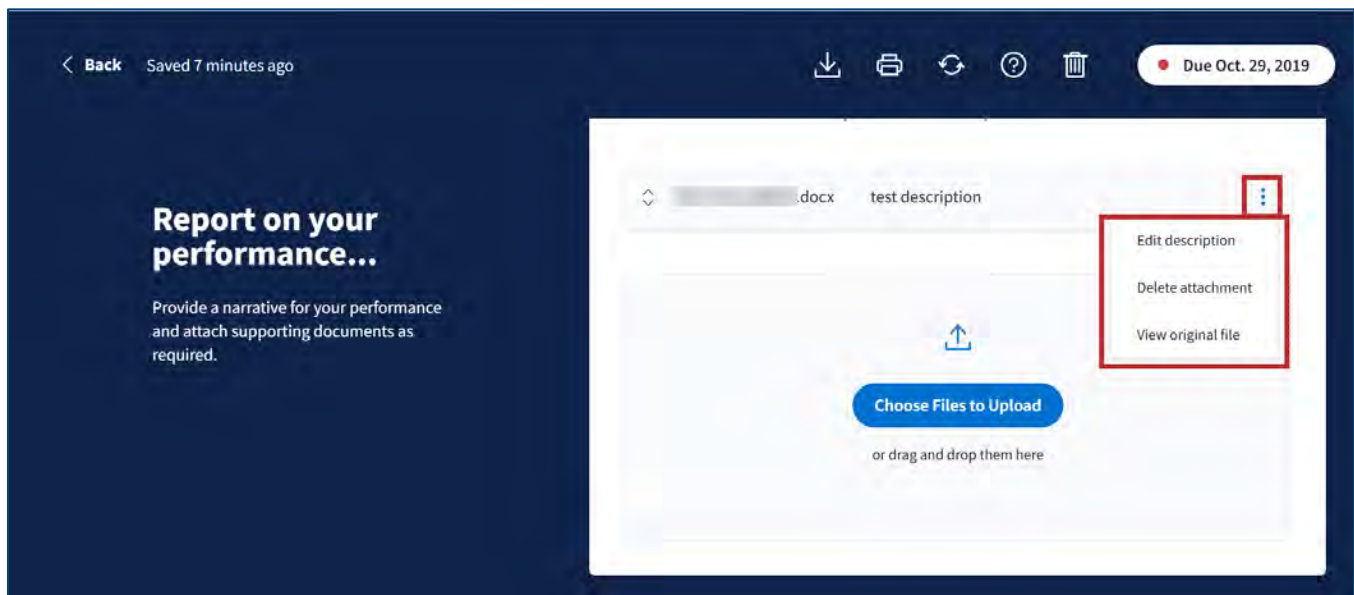


Figure 26: Performance Progress Report screen with attachments Actions List icon drop-down

Upon deleting an attachment, the “Your attachment was successfully deleted” message appears in the lower-left corner of the screen.

The screenshot shows the 'Report on your performance...' section. A blue arrow points to a green success message box in the lower-left corner that reads: 'Your attachment was successfully deleted.' with a close button (X). The main area contains a 'Choose Files to Upload' button and a note 'or drag and drop them here'. The top navigation bar includes a 'Back' button, 'Saved 9 minutes ago', and a 'Due Oct. 29, 2019' badge. The bottom section is labeled '10. Certification'.

Figure 27: PPR screen with Your attachment was successfully deleted message

7. Scroll to the *Finish and Submit* section. Review and verify that all information is accurate. Click the **checkbox** to certify the report is correct and enter your **full name** in the *Enter full name* field.

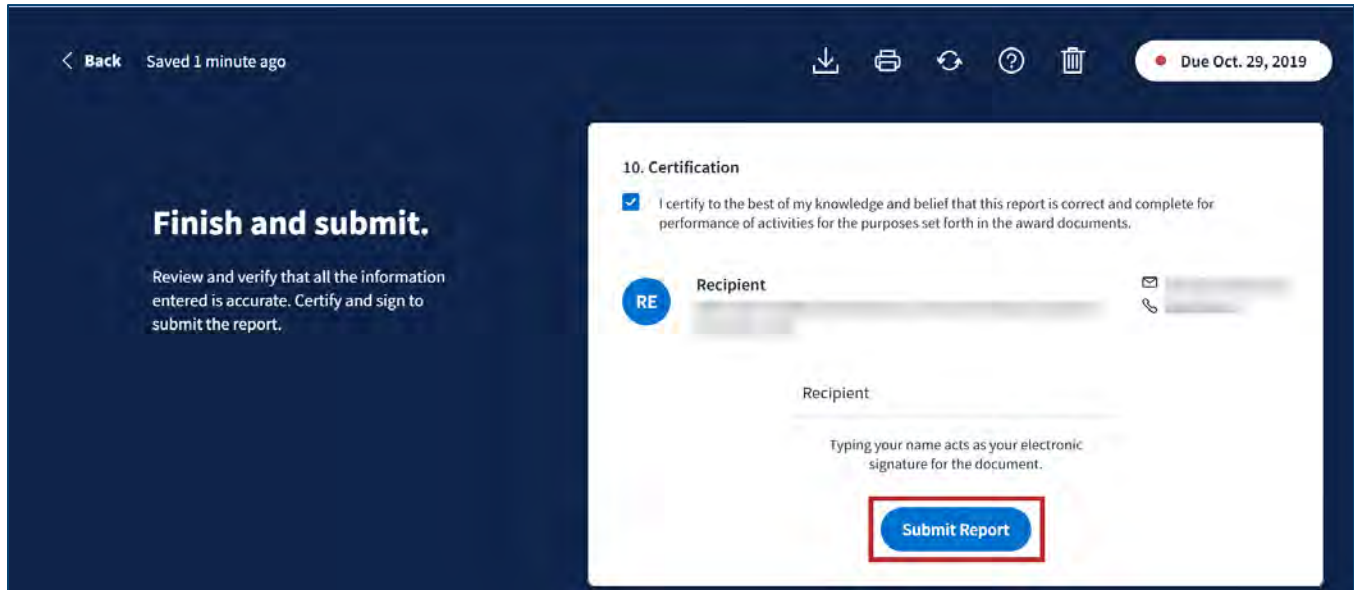
The screenshot shows the 'Finish and submit.' section. A red arrow points to a checked checkbox in the '10. Certification' section, with the text: 'I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents.' Below this is a 'Recipient' section with a red-bordered text field labeled 'Enter full name.....'. A note below the field states: 'Typing your name acts as your electronic signature for the document.' A 'Submit Report' button is at the bottom. The top navigation bar includes a 'Back' button, 'Saved less than a minute ago', and a 'Due Oct. 29, 2019' badge.

Figure 28: PPR screen with certify checkbox and Enter full name field



8. Upon selecting the *Certification* checkbox and entering the full name, the *Submit Report* button activates. Click the **Submit Report** button.

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



The screenshot shows the GrantSolutions PPR interface. On the left, a dark blue sidebar contains the text "Finish and submit." and "Review and verify that all the information entered is accurate. Certify and sign to submit the report." The main content area is white and contains a "10. Certification" section. This section has a checked checkbox and the text "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." Below this is a "Recipient" section with a blue circle containing "RE" and a text input field. To the right of the input field are icons for email and phone. Below the input field is the text "Recipient" and "Typing your name acts as your electronic signature for the document." At the bottom of the section is a blue button labeled "Submit Report" which is highlighted with a red rectangular box. The top of the interface has a dark blue header with a "< Back" link, "Saved 1 minute ago", and several icons (download, print, refresh, help, trash). A red dot and "Due Oct. 29, 2019" are also visible in the top right.

Figure 29: PPR screen with Submit Report button

- The “Reports List” screen appears and the “Successfully submitted Performance Progress Report” message appears in the lower-left corner of the screen. The PPR status is *Submitted*.

View the report at any time by clicking the **View Report** button. Track the workflow status from the **Status** button.

The screenshot shows the 'Reports List' interface. At the top, there's a header 'Reports List'. Below it, a white box contains a message: 'Successfully submitted Performance Progress Report'. Underneath this, there are four columns: 'GRANT PROGRAM', 'GRANTEE ORGANIZATION', 'UEI', and 'FAIN'. Below these columns is a table titled 'All Reports'. The table has a section for 'Past Reporting Periods' and a table with the following columns: 'TYPE', 'DUE DATE', 'REPORTING PERIOD', 'STATUS', and 'ACTIONS'. The first row in the table shows 'Quarterly PPR', '09/01/2025 - Due about 2 months ago', '06/01/2025 - 08/31/2025', 'Submitted' (with a blue box around it), and 'View Report' (with a red box around it) and a vertical ellipsis icon.

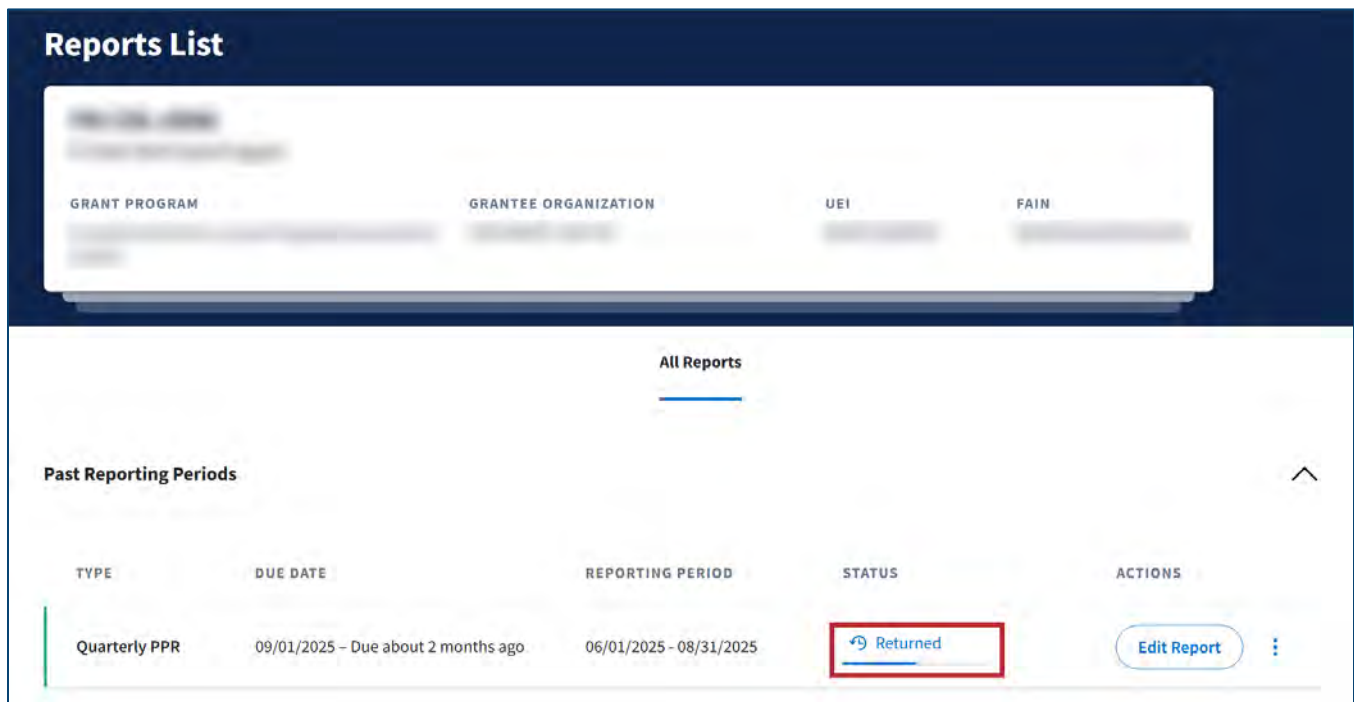
TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	09/01/2025 - Due about 2 months ago	06/01/2025 - 08/31/2025	Submitted	View Report

Figure 30: Reports List screen with Submitted status and View Report button

## RETURNED PERFORMANCE PROGRESS REPORT

Federal staff may return a PPR to the Grant Recipient for modifications. A new editable report is automatically created and is pre-populated with information from the returned report, including attachments.

On the *Reports* tab of the “Grant Details” screen in the New Experience, or on the “Reports List” screen in the Classic Experience, click the **Status** button to view the workflow history with the originally submitted report saved as a PDF.



The screenshot shows the 'Reports List' interface. At the top, there's a header 'Reports List'. Below it, a white box contains filters for 'GRANT PROGRAM', 'GRANTEE ORGANIZATION', 'UEI', and 'FAIN'. Underneath, a tab labeled 'All Reports' is selected. A section titled 'Past Reporting Periods' is visible. Below this is a table with the following columns: TYPE, DUE DATE, REPORTING PERIOD, STATUS, and ACTIONS. The table contains one row: 'Quarterly PPR', '09/01/2025 – Due about 2 months ago', '06/01/2025 - 08/31/2025', and a 'Returned' status button (which is highlighted with a red box in the image). The ACTIONS column contains an 'Edit Report' button and a vertical ellipsis menu icon.

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	09/01/2025 – Due about 2 months ago	06/01/2025 - 08/31/2025	Returned	Edit Report

Figure 31: Reports List screen with Returned status button

The “PPR Reporting Workflow History” window appears. Click the *View Submission* button to access the submitted report in PDF format.

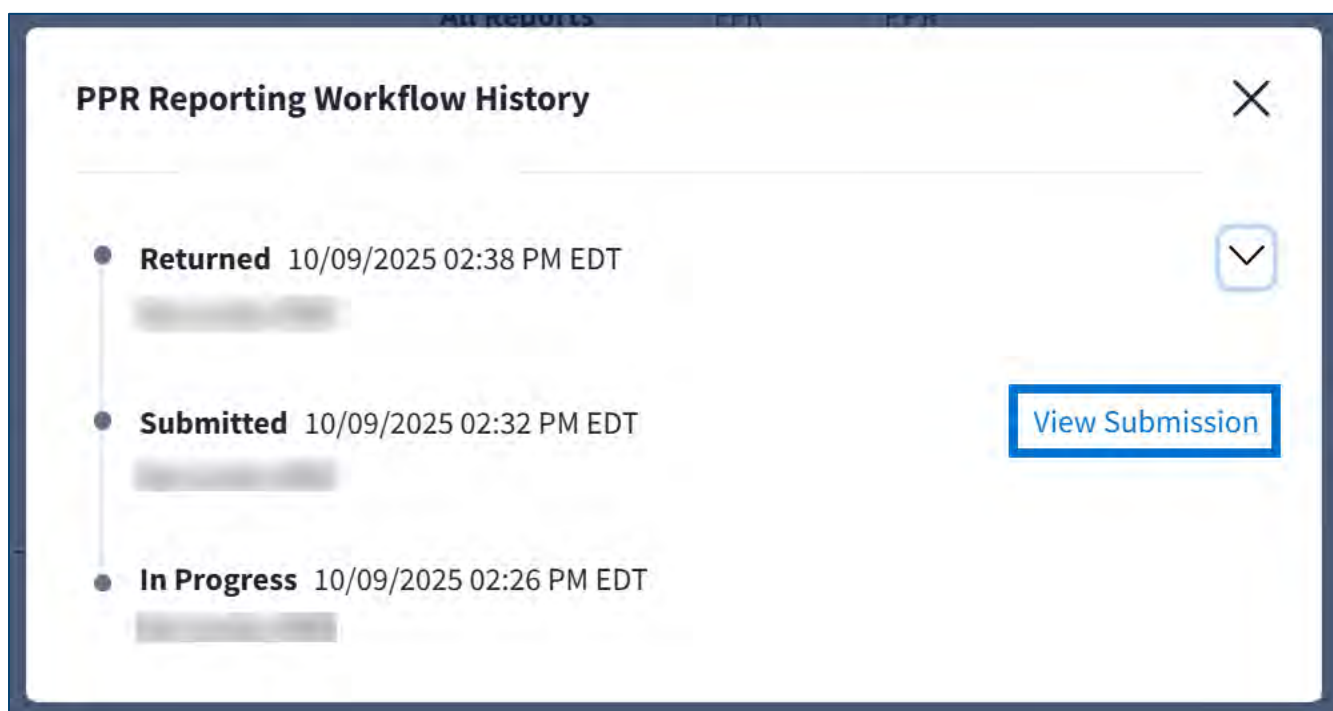
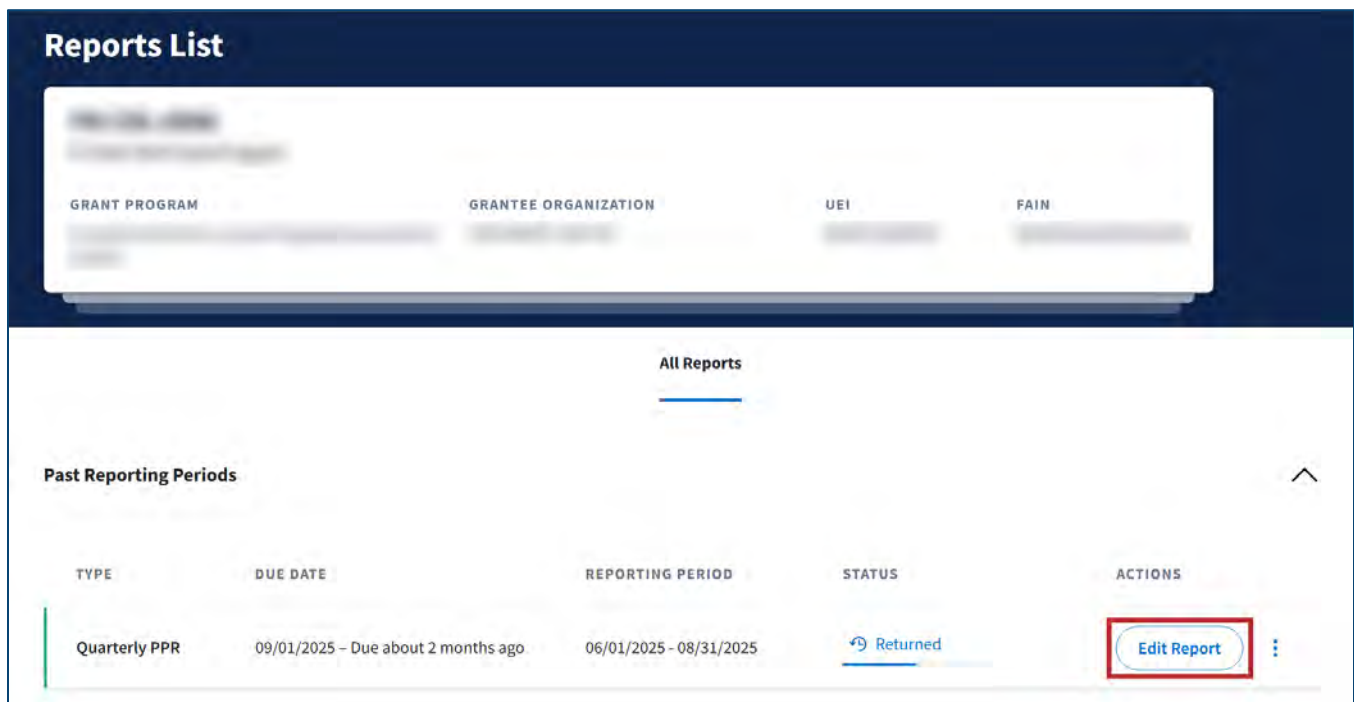


Figure 32: PPR Reporting Workflow History window with View Submission button

## EDIT RETURNED PERFORMANCE PROGRESS REPORT

On the *Reports* tab of the “Grant Details” screen in the New Experience, or on the “Reports List” screen in the Classic Experience, click the **Edit Report** button to make the required changes and follow the steps in the [Complete and Submit Performance Progress Report](#) section to resubmit a returned PPR.



**Reports List**

GRANT PROGRAM: [blurred] GRANTEE ORGANIZATION: [blurred] UEI: [blurred] FAIN: [blurred]

All Reports

Past Reporting Periods

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Quarterly PPR	09/01/2025 – Due about 2 months ago	06/01/2025 - 08/31/2025	Returned	<a href="#">Edit Report</a>

Figure 33: Reports List screen with Edit Report button