GrantSolutions User Guide

Grant Recipient Process: Performance Progress Report

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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- *Withdrawn*: Grant Recipient has withdrawn the report for edits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
Not Started	Start Report
In Progress	Edit Report, Print, Download (PDF)
Submitted	View Report, Print, Download (PDF)
Accepted	View Report, Print, Download (PDF)
Returned	Edit Report, Print, Download (PDF)
Withdrawn	Edit Report, Print, Download (PDF)
No Data Available	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*.

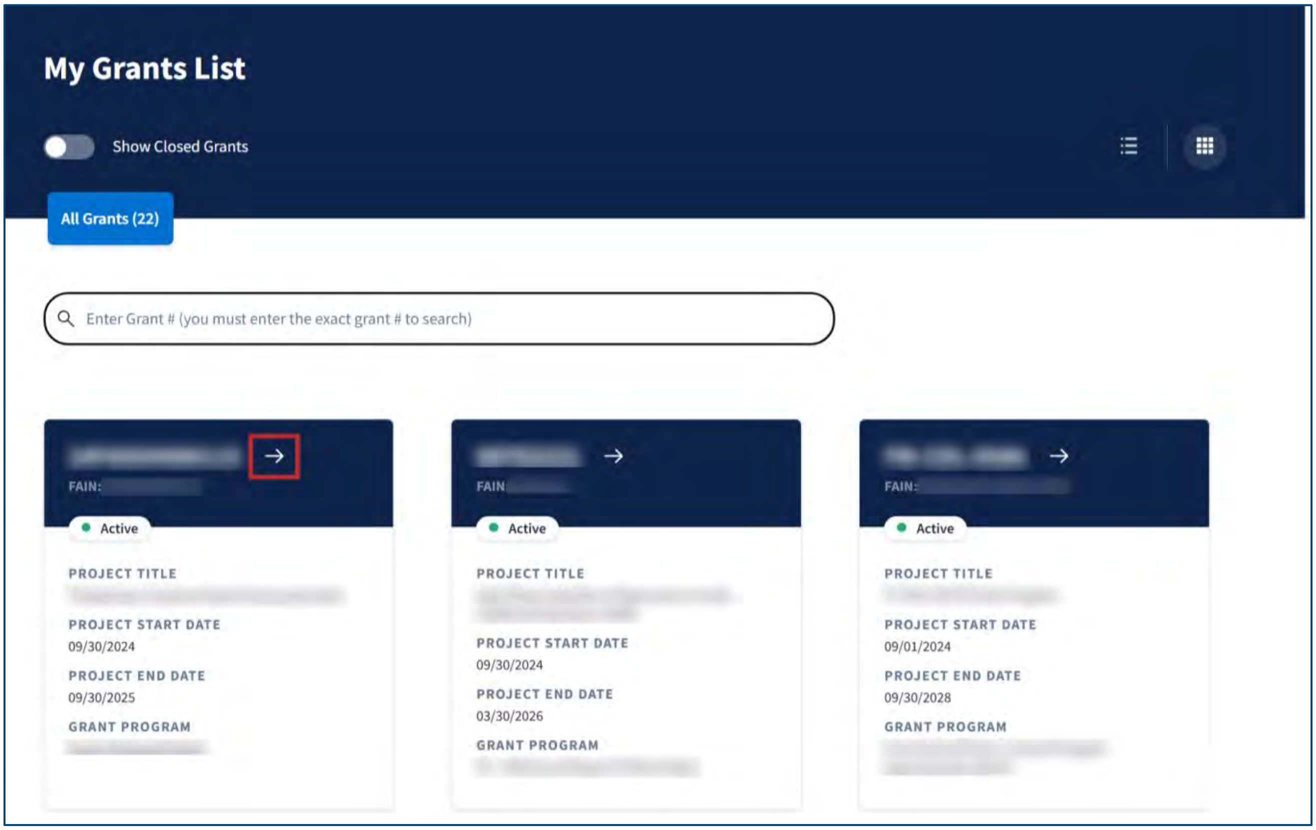

Figure 2: My Grants List screen with arrow button

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

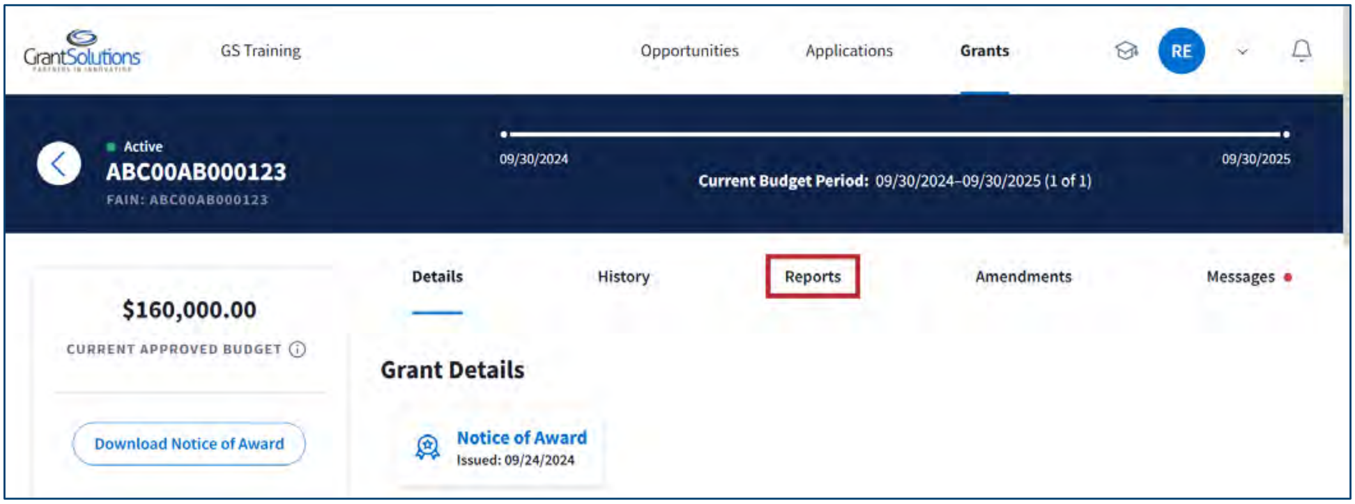

Figure 3: Grant Details screen with Reports tab

The *Reports* tab opens.

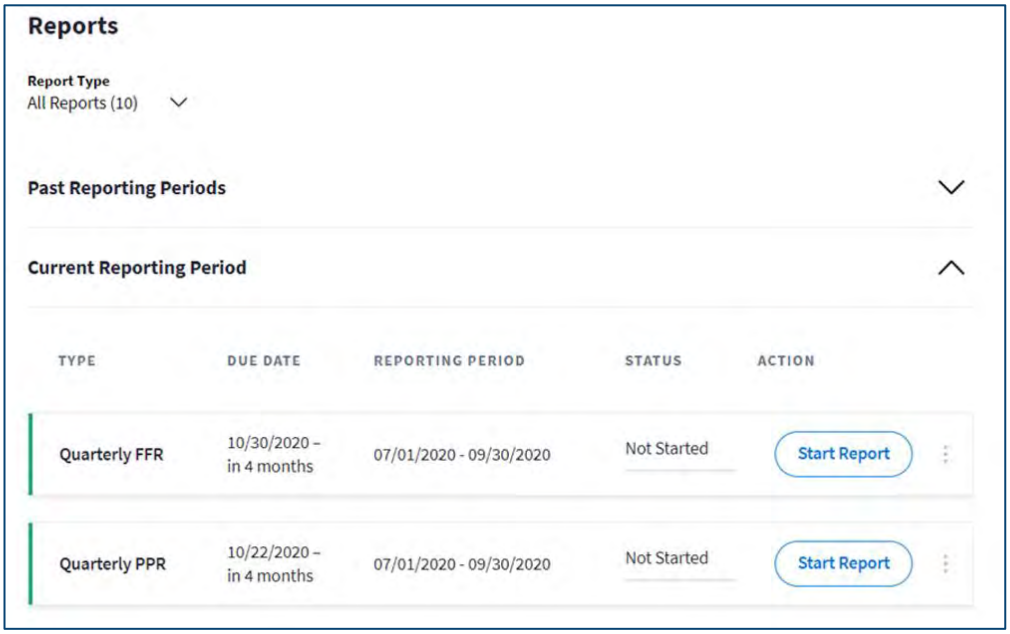

Figure 4: Reports tab

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

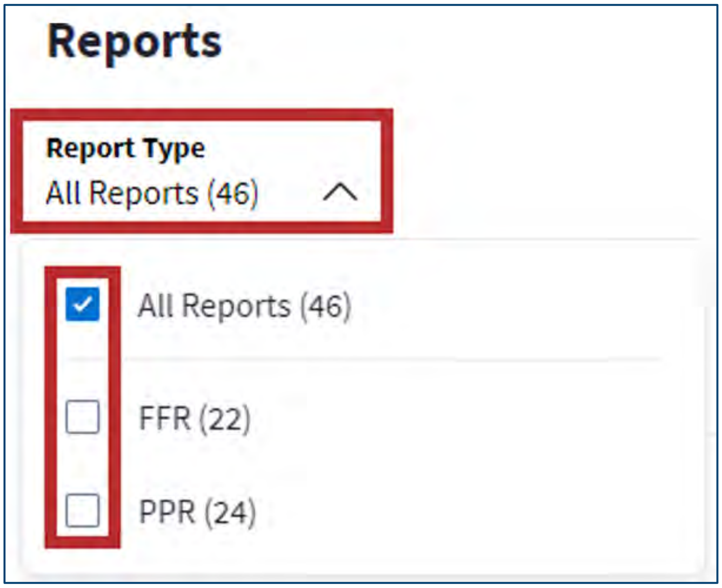

Figure 5: Report Type drop-down

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.

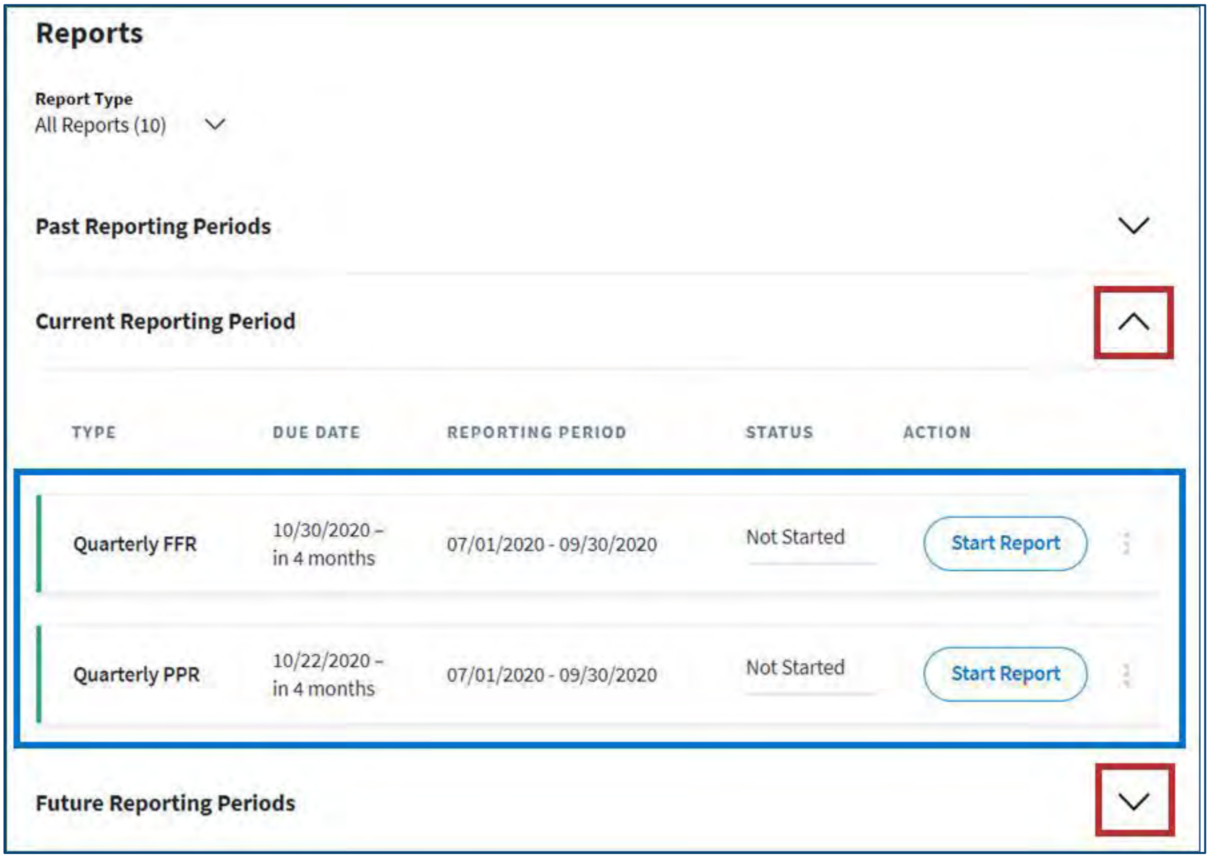

Figure 6: Reports tab with Reporting Periods and up and down arrows

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.

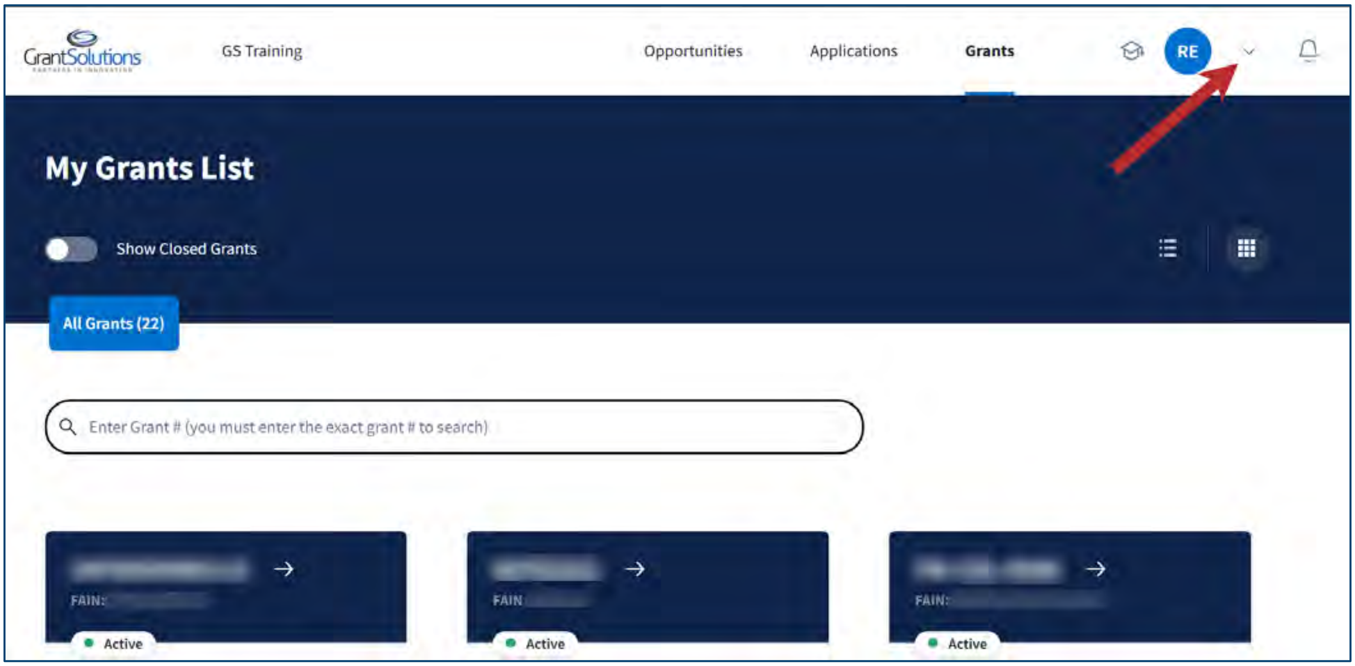

Figure 7: My Grants List screen with initials drop-down

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

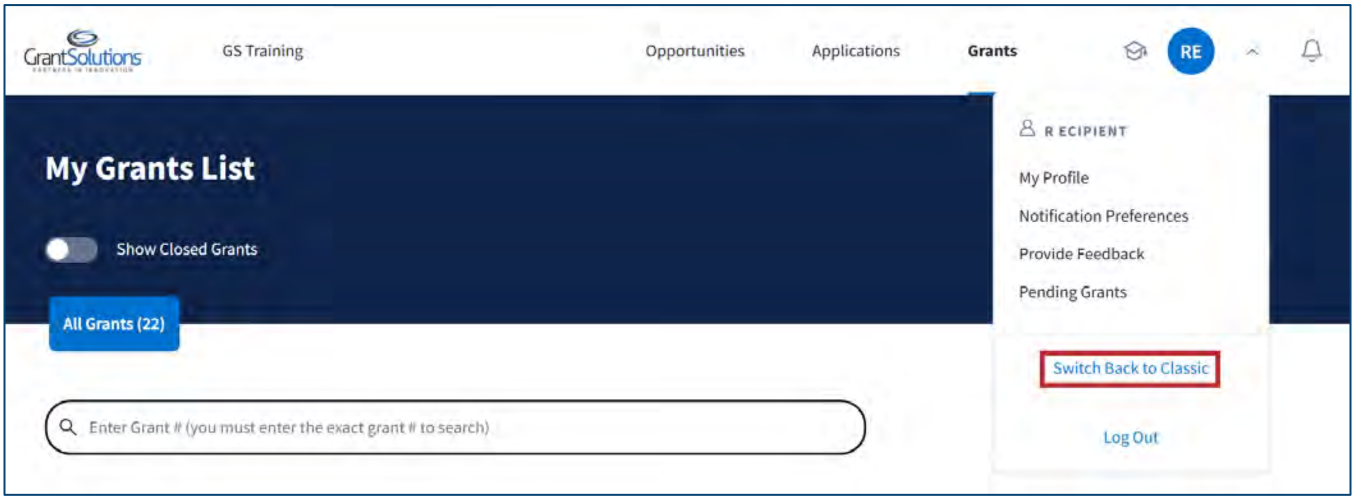

Figure 8: My Grants List screen with initials drop-down and Switch Back to Classic hyperlink

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.

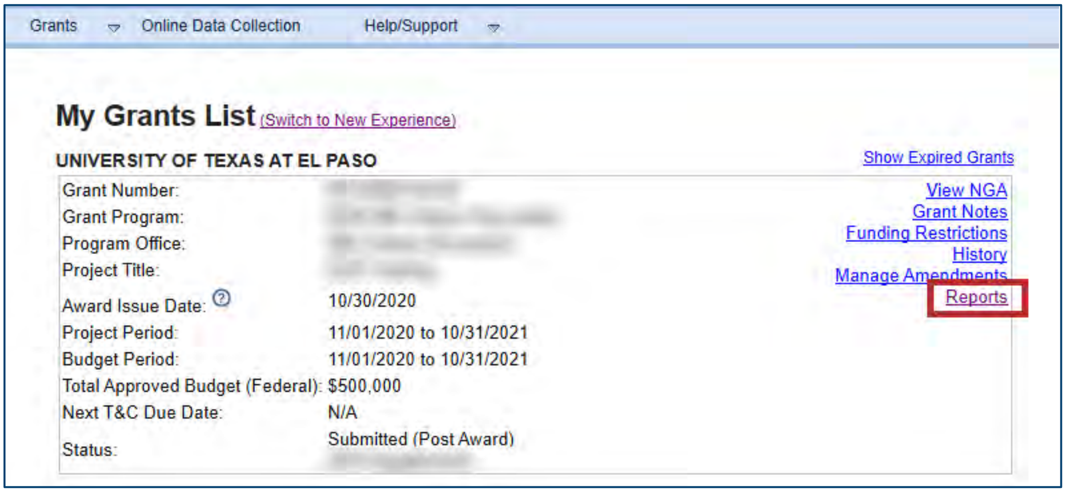

Figure 9: My Grants List screen with Reports hyperlink

The “Reports List” screen appears.

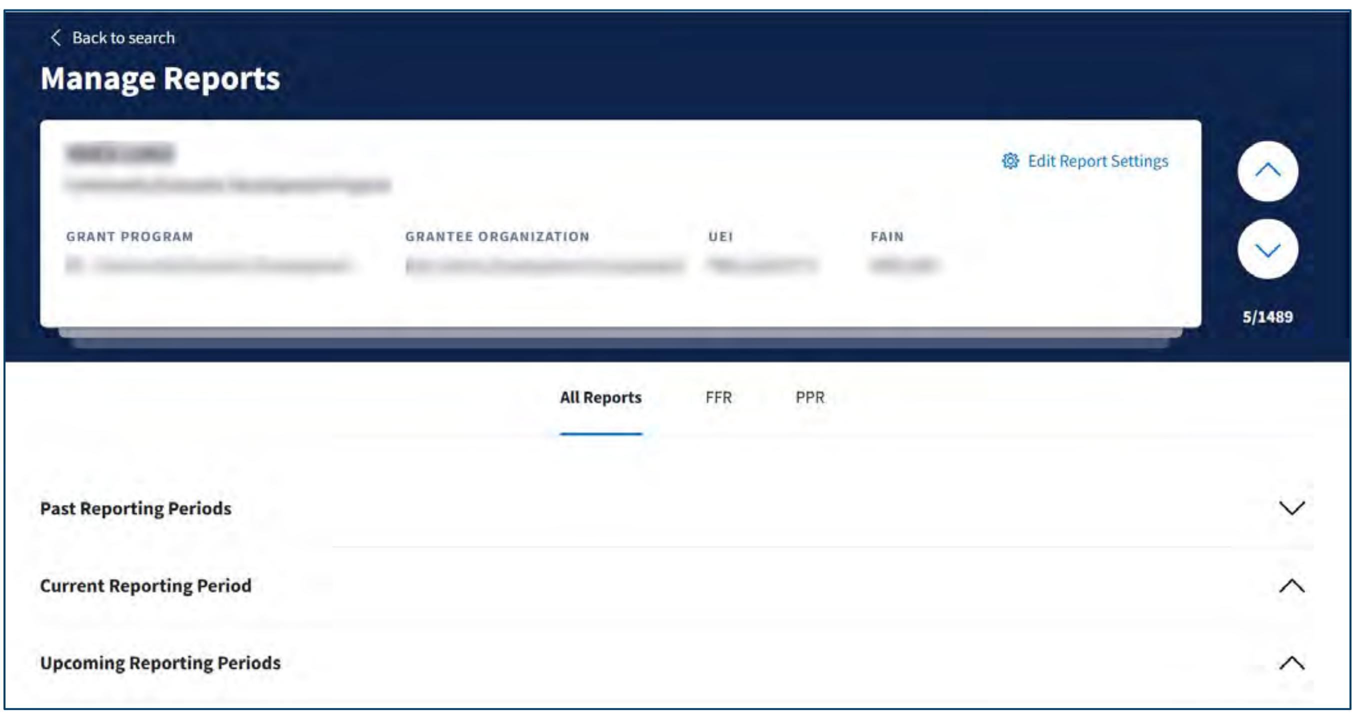

Figure 10: Reports List screen

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*.

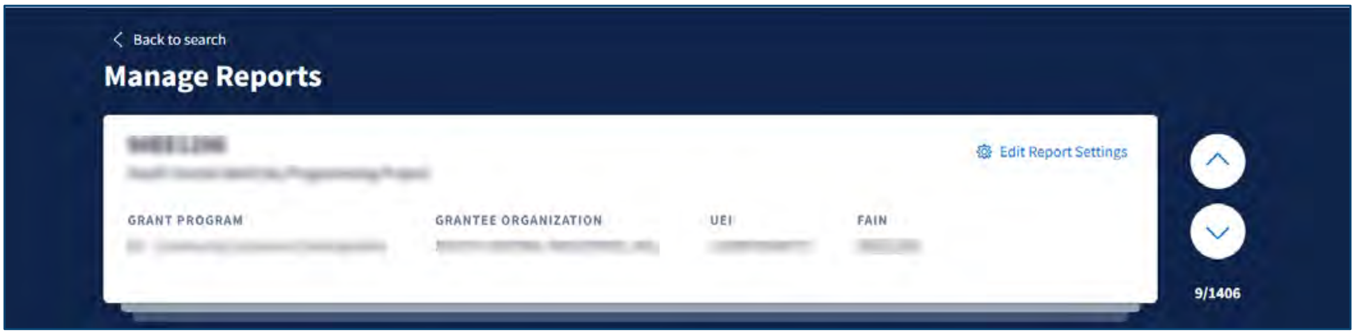

Figure 11: Manage Reports screen

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.

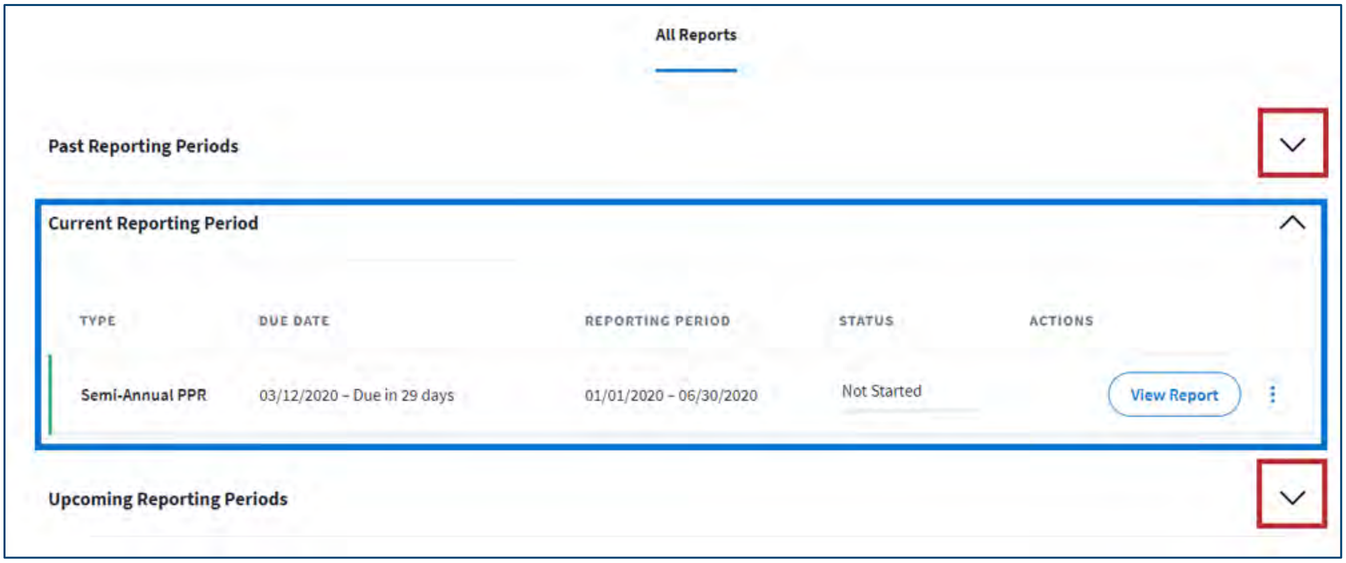

Figure 12: Reports List screen with Reporting Periods and up and down arrows

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.

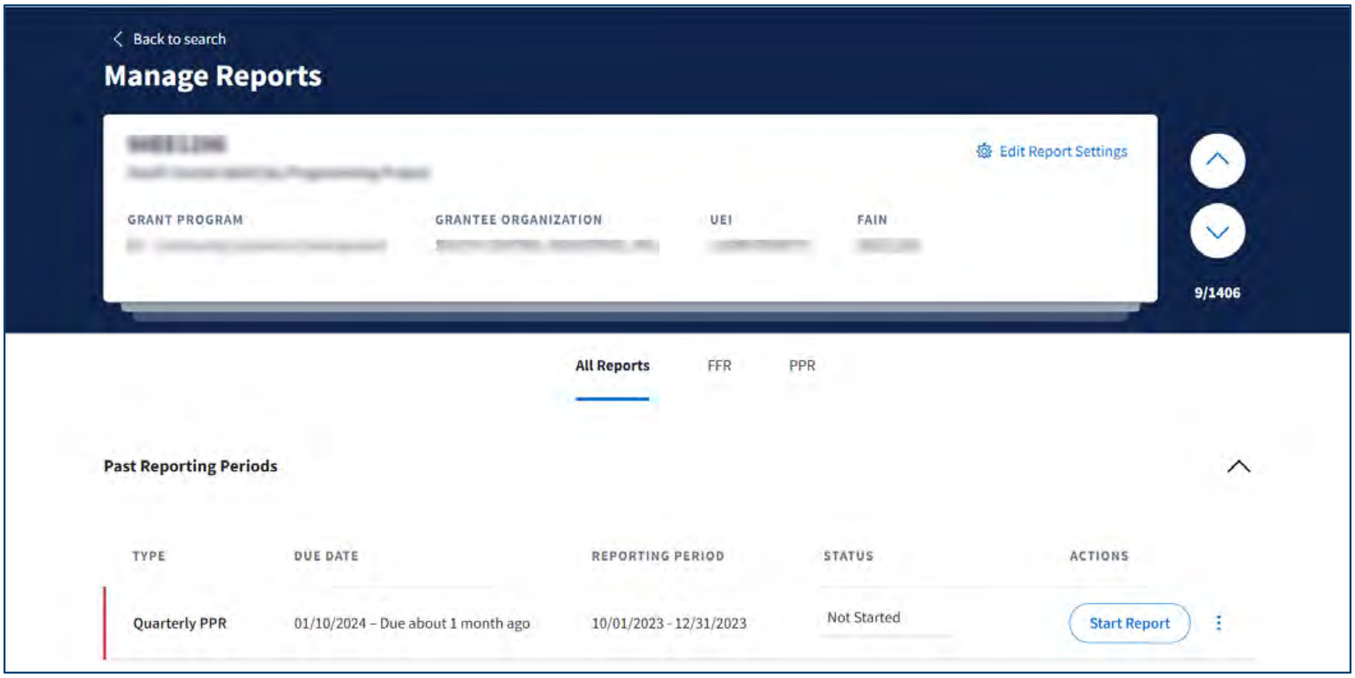

Figure 13: Reports List screen

- 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.

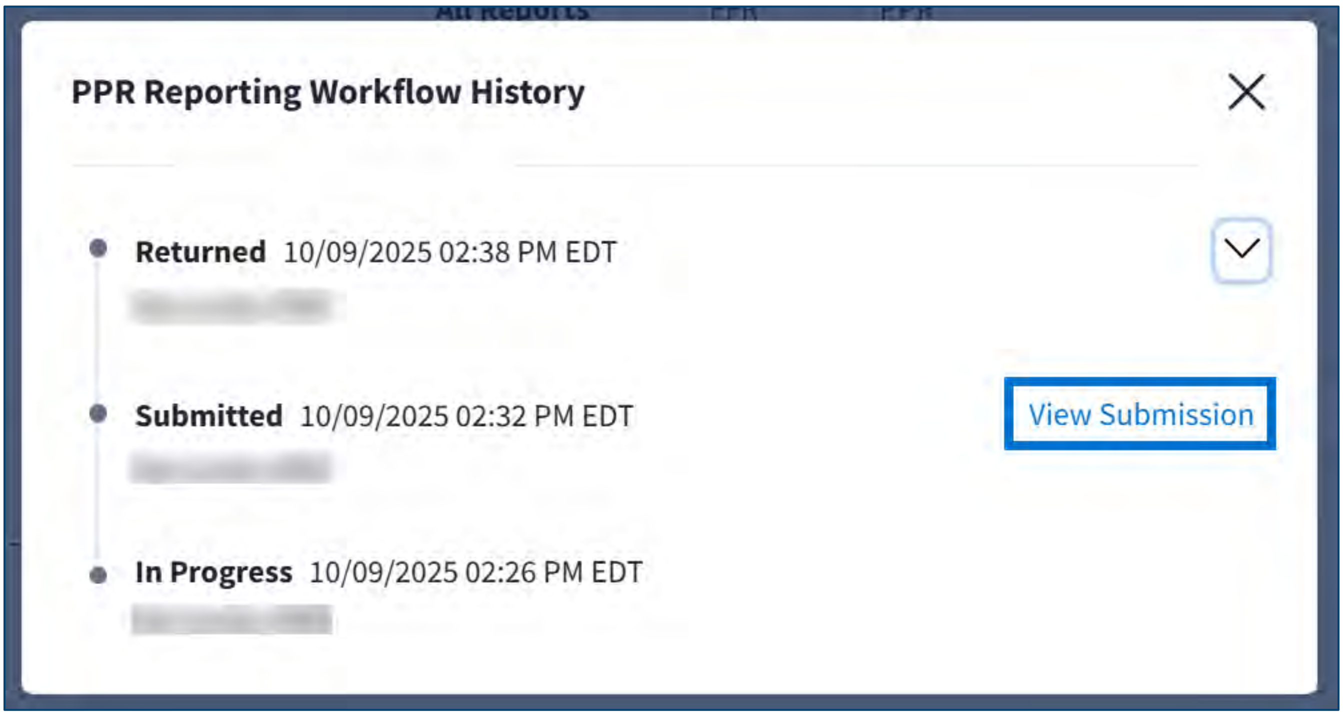

Figure 14: PPR Reporting Workflow History window with View Submission hyperlink

- **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*.

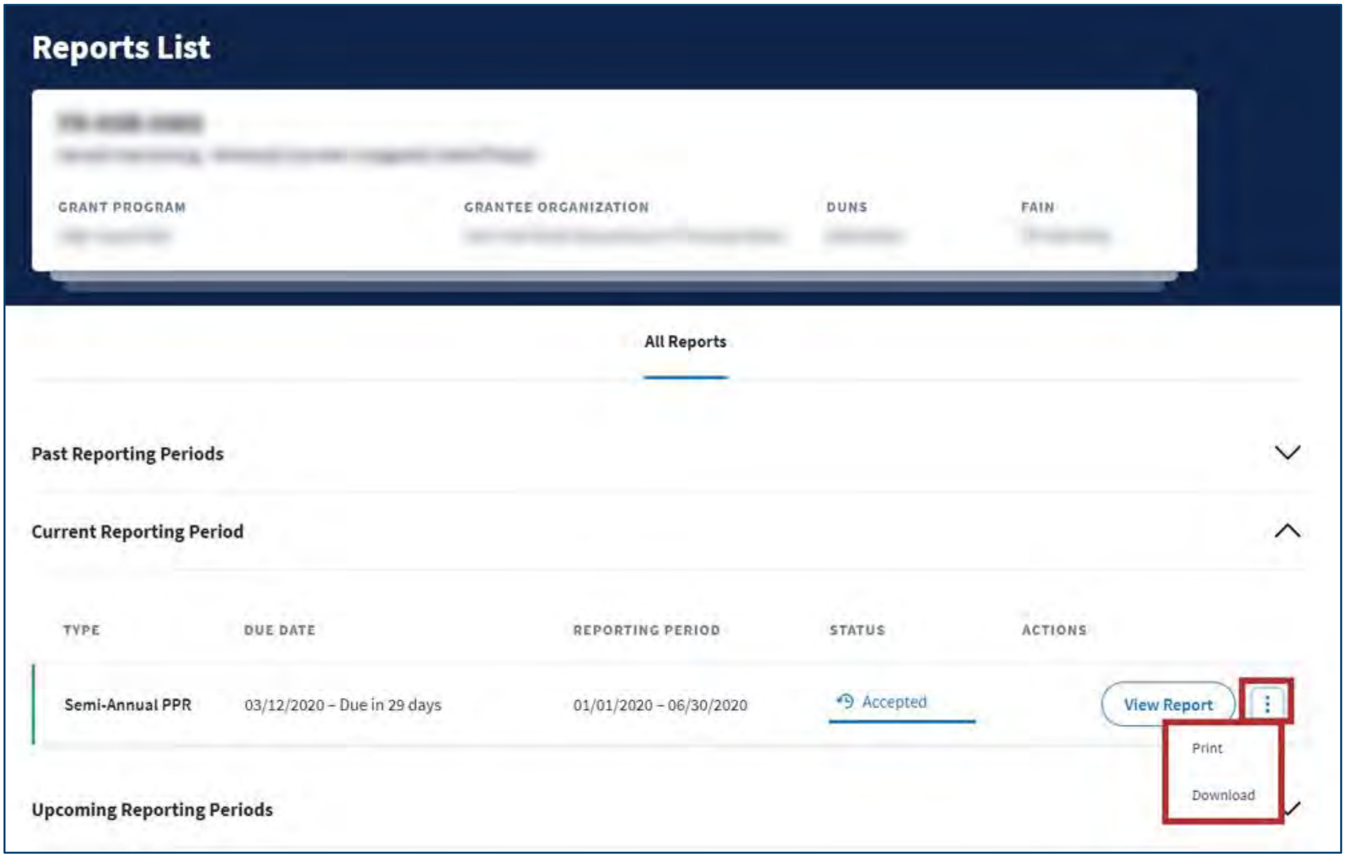

Figure 16: Reports List screen with Actions List icon drop-down

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.

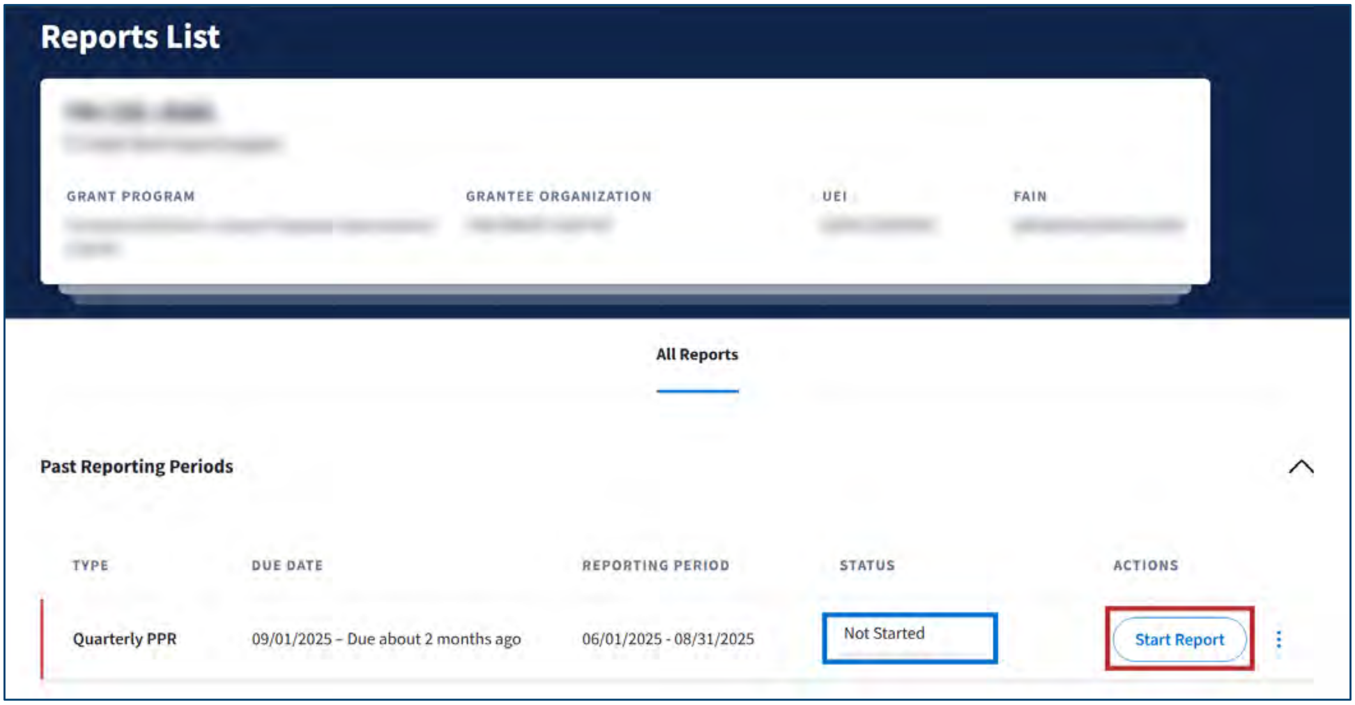

Figure 17: Reports List screen with Not Started Status and Start Report button

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

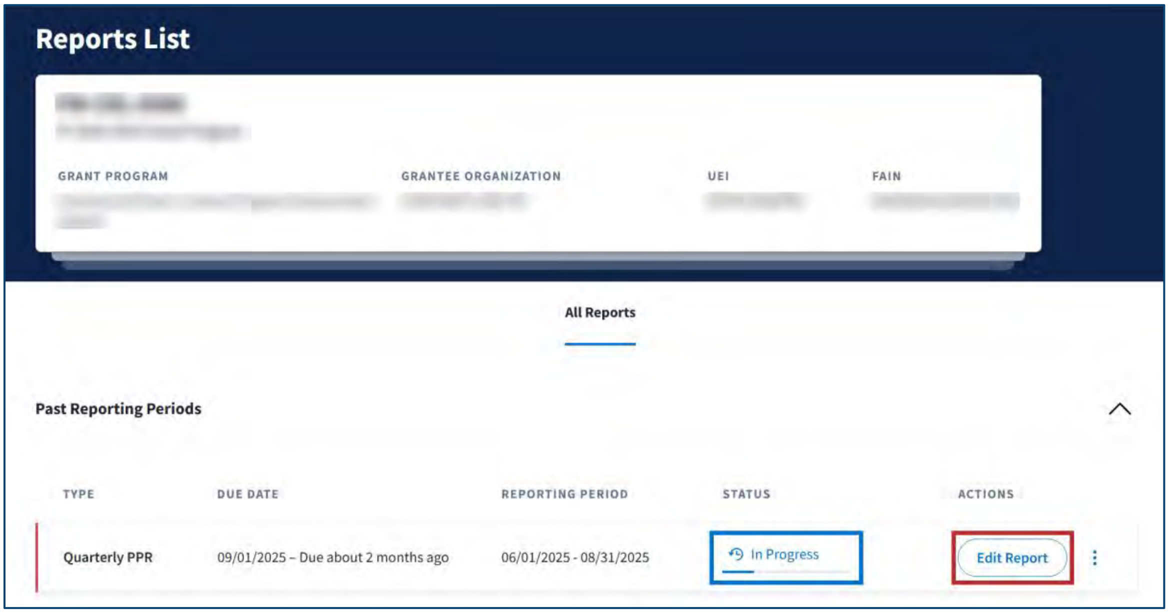

Figure 18: Reports List screen with In Progress Status and Edit Report button

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.

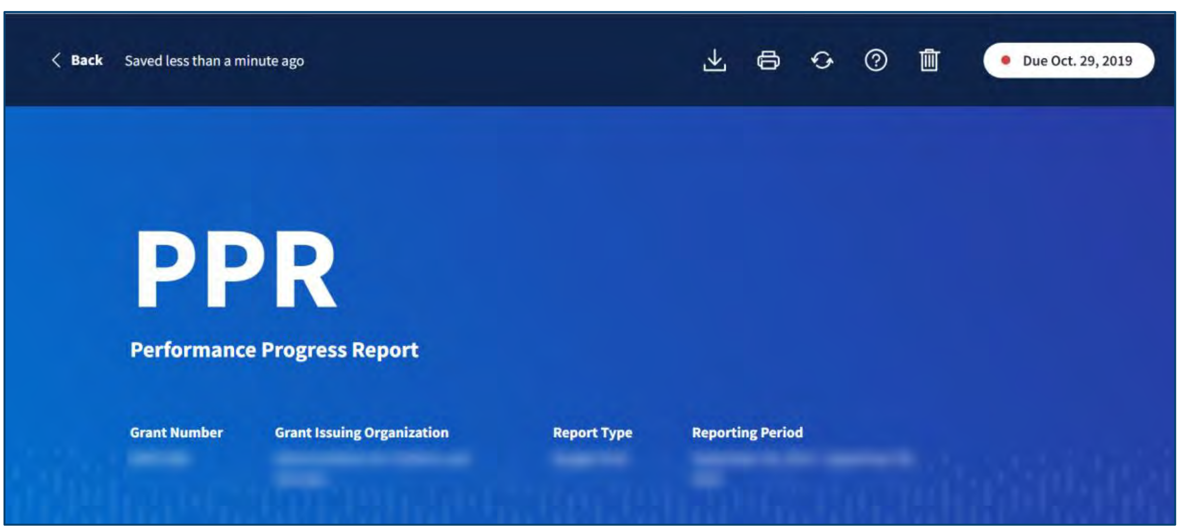

Figure 19: PPR screen

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

2. Scroll to the *Review your reports details* section. The left side of the screen describes the purpose of a section and any instructions.

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

   Click an **information i**con for more details about that field.

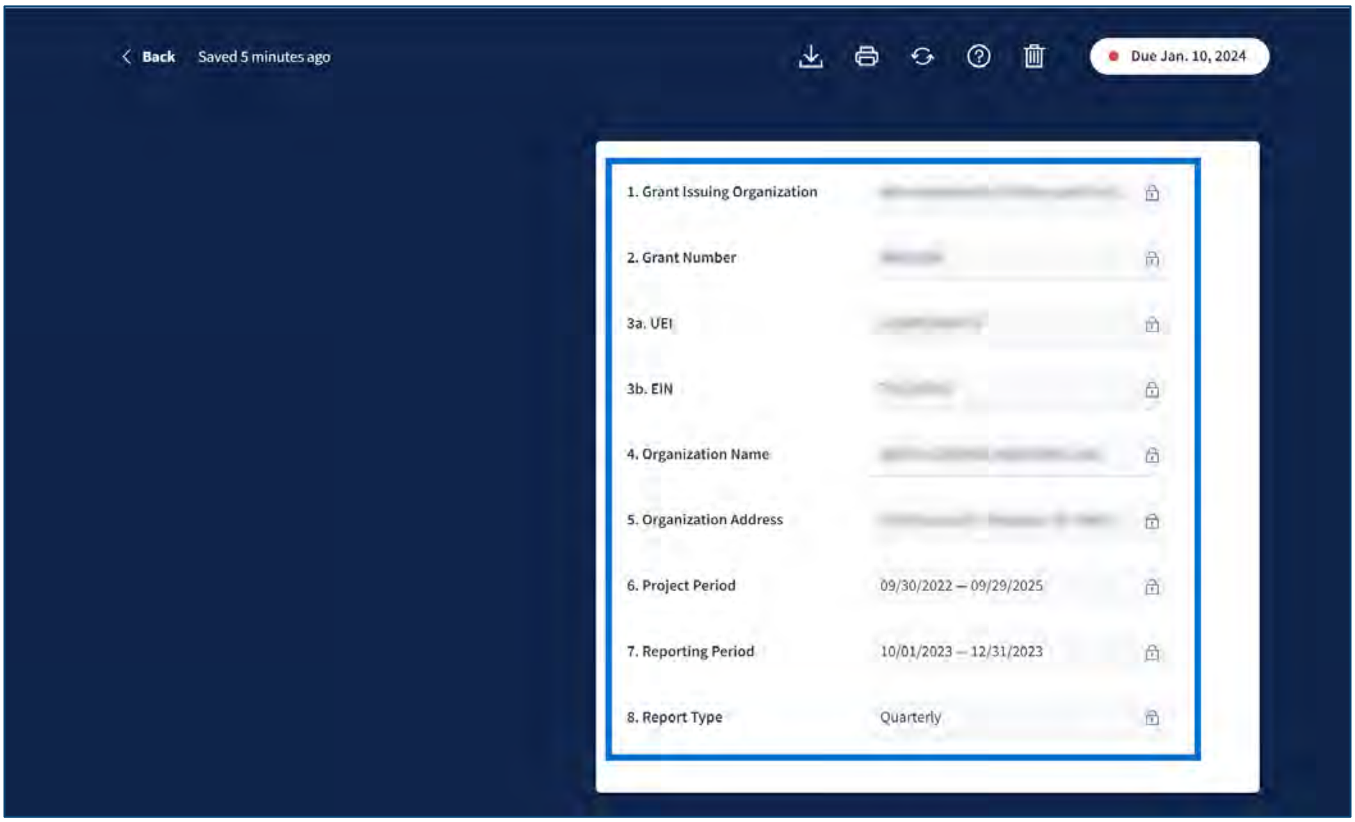

Figure 21: PPR Review your report details section

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

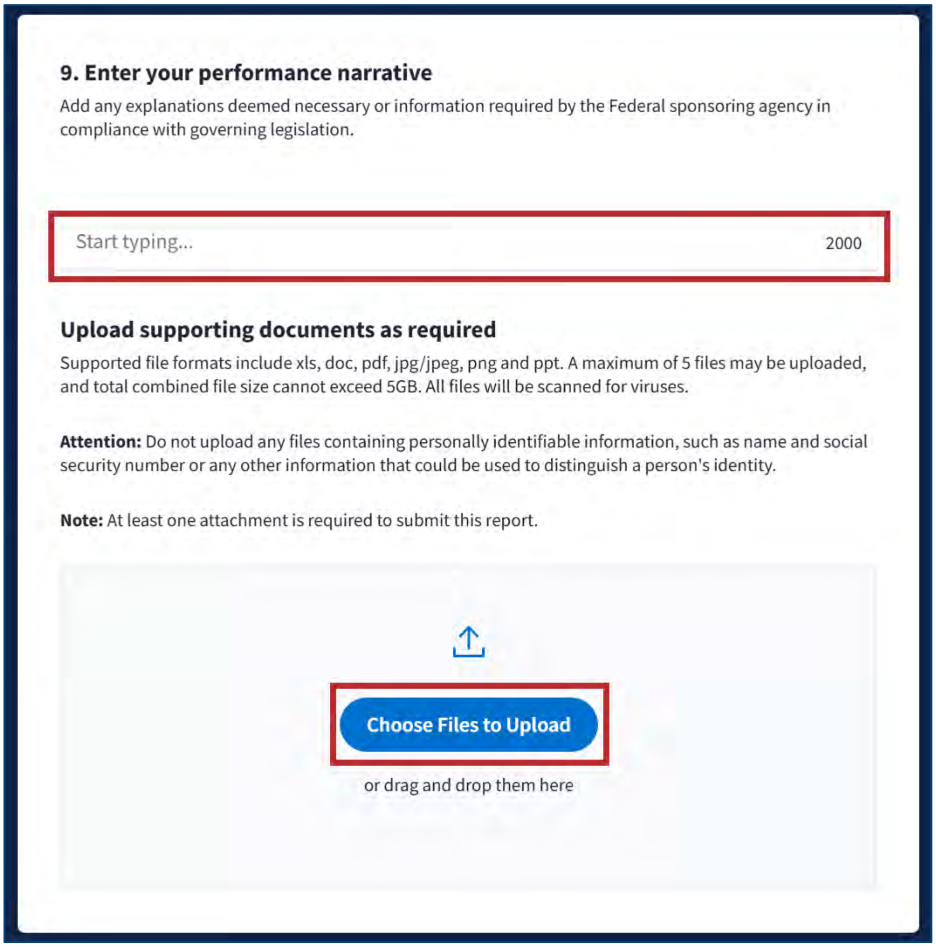

Figure 22: Performance Progress Report screen with Start typing field and Choose Files to Upload button

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.

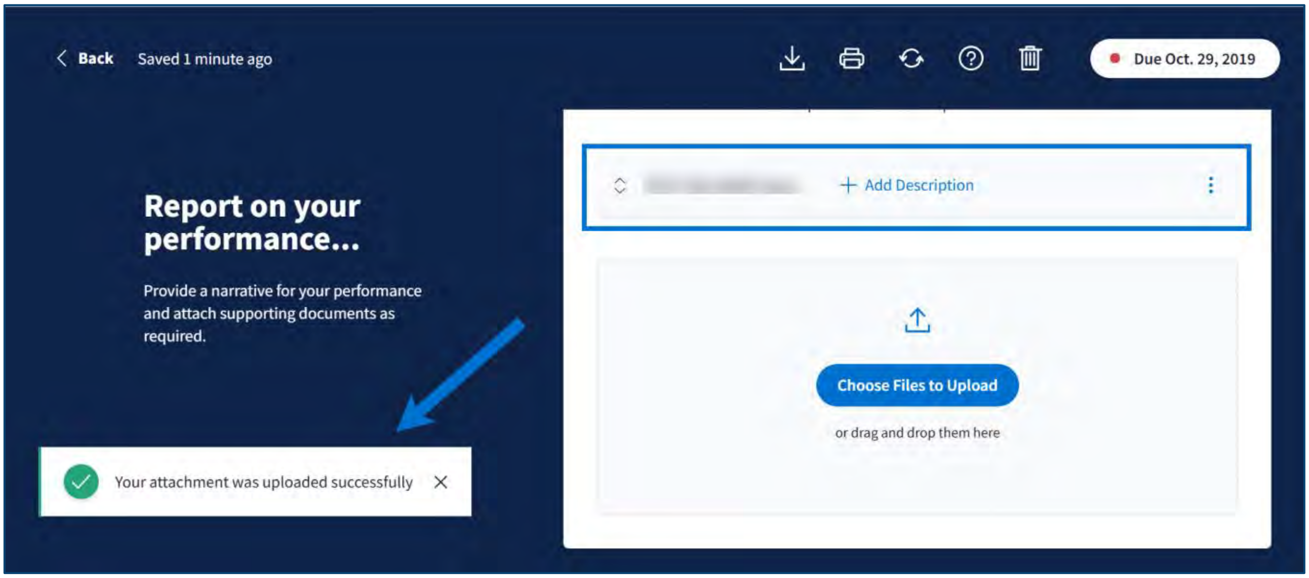

Figure 23: PPR screen with uploaded file and successful attachment message

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

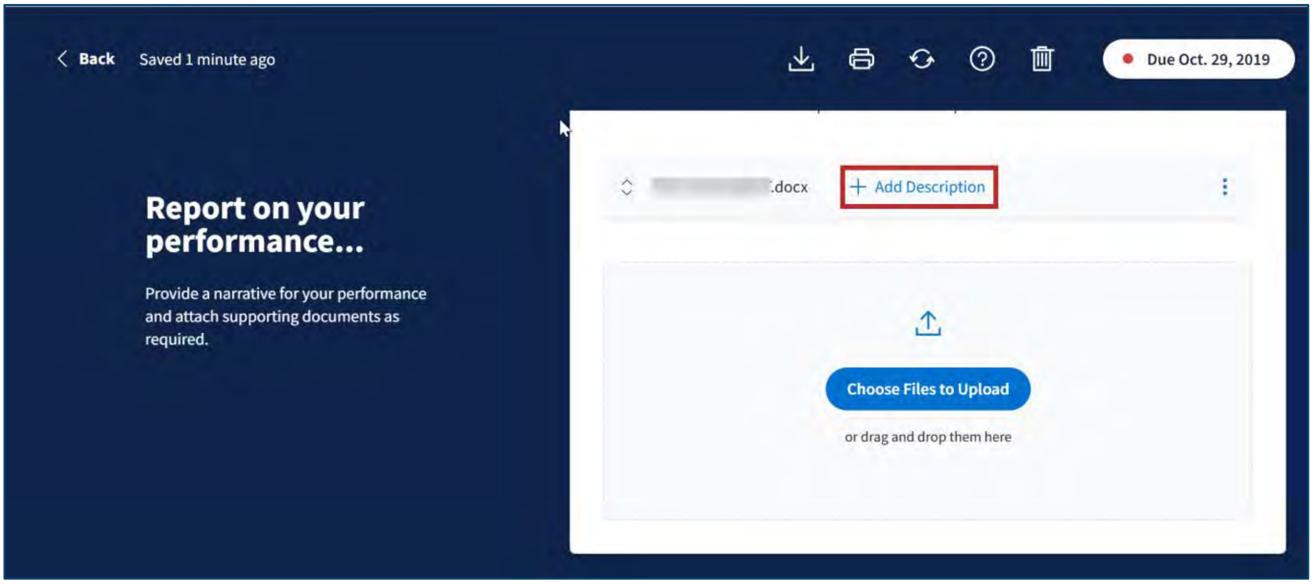

Figure 24: PPR screen with +Add Description button

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

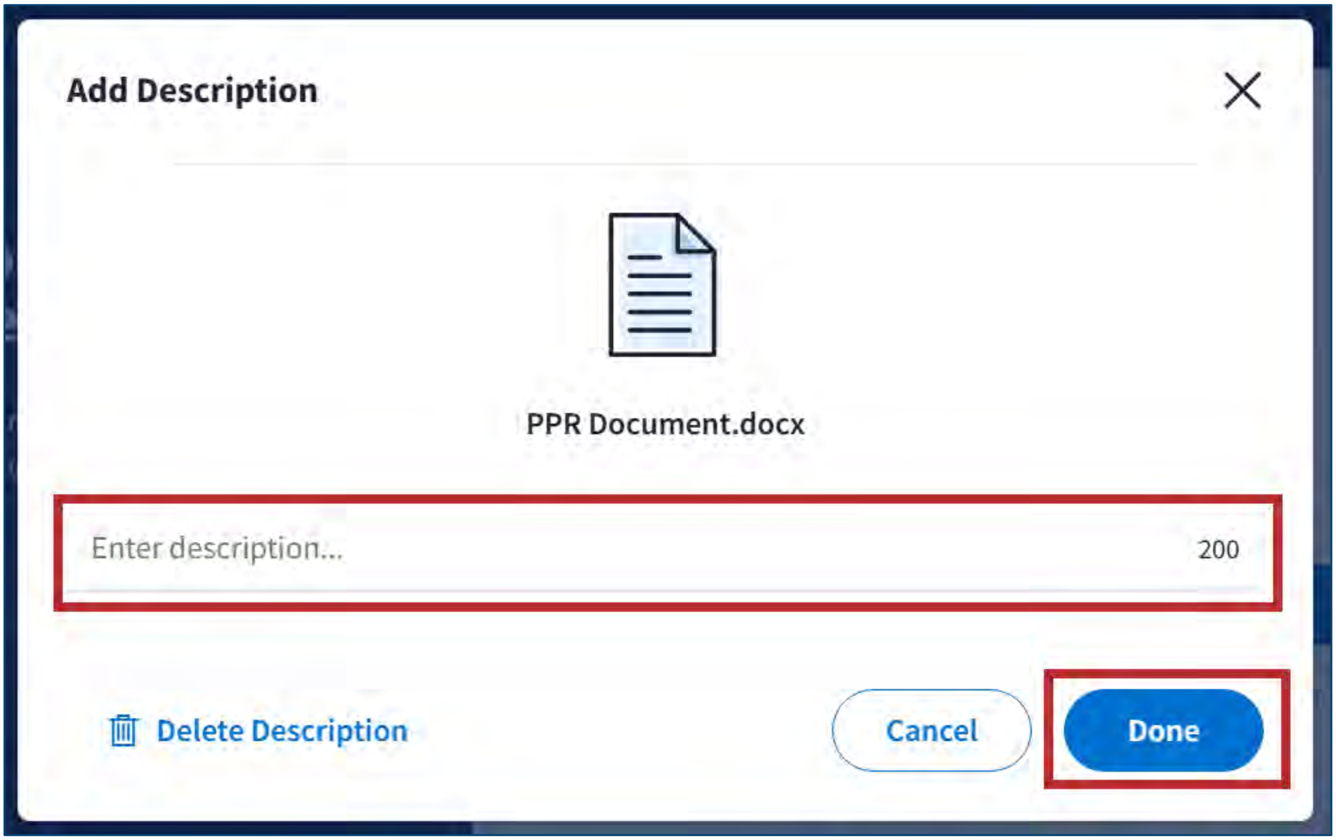

Figure 25: Add Description window with Enter Description field and Done button

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.

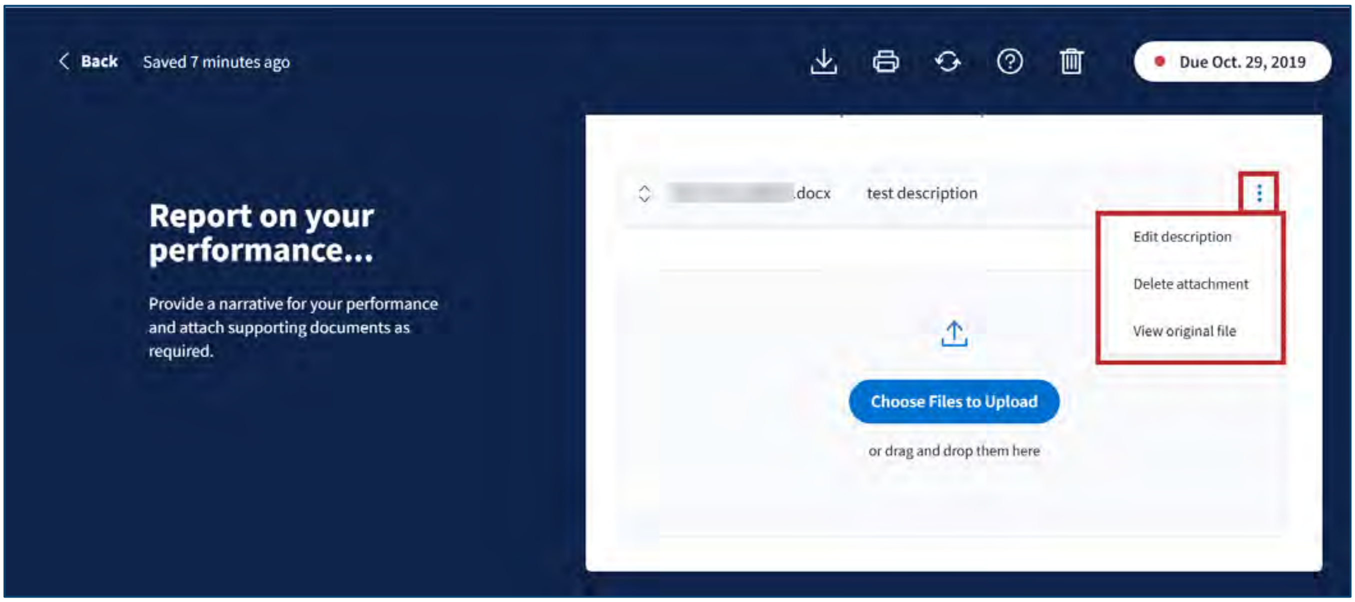

Figure 26: Performance Progress Report screen with attachments Actions List icon drop-down

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

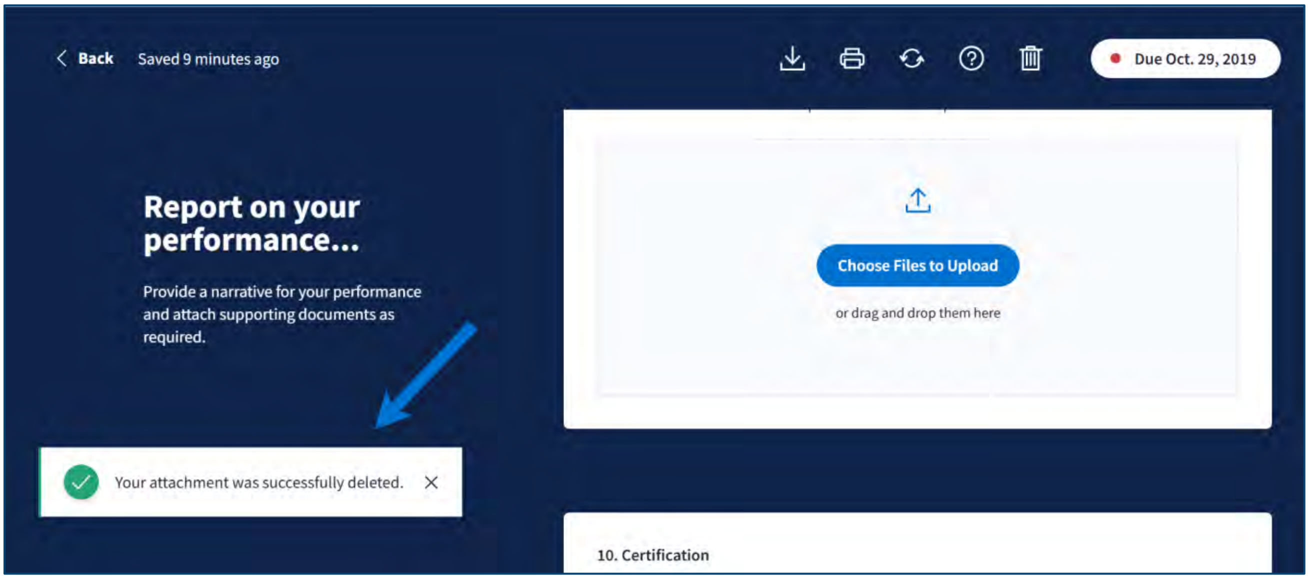

Figure 27: PPR screen with Your attachment was successfully deleted message

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.

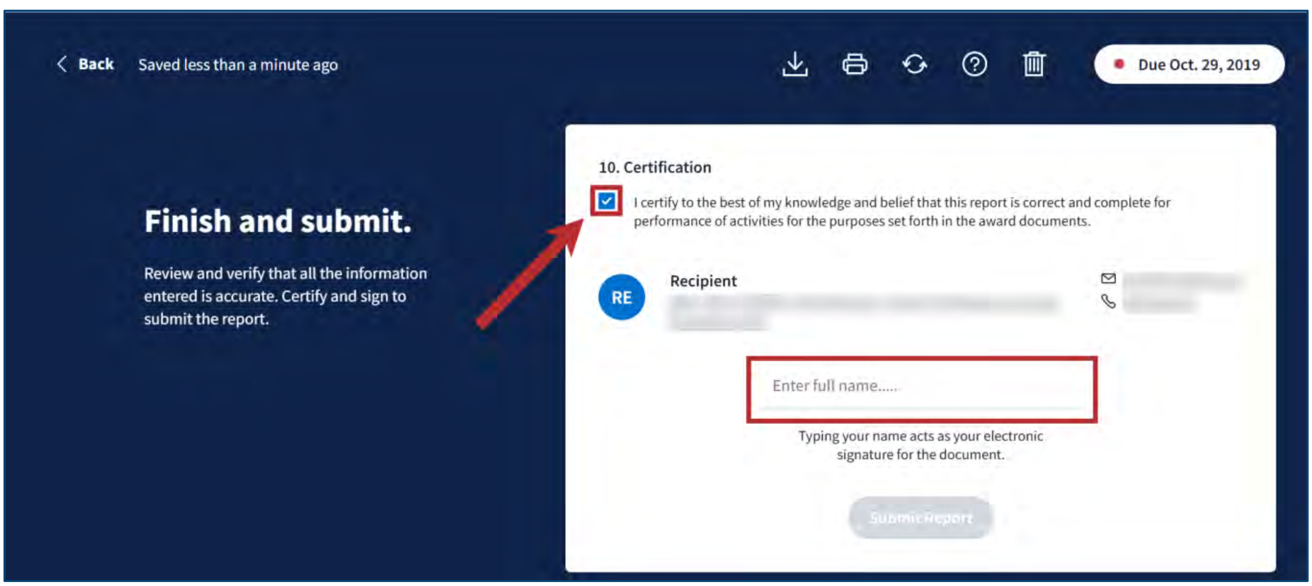

Figure 28: PPR screen with certify checkbox and Enter full name field

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.

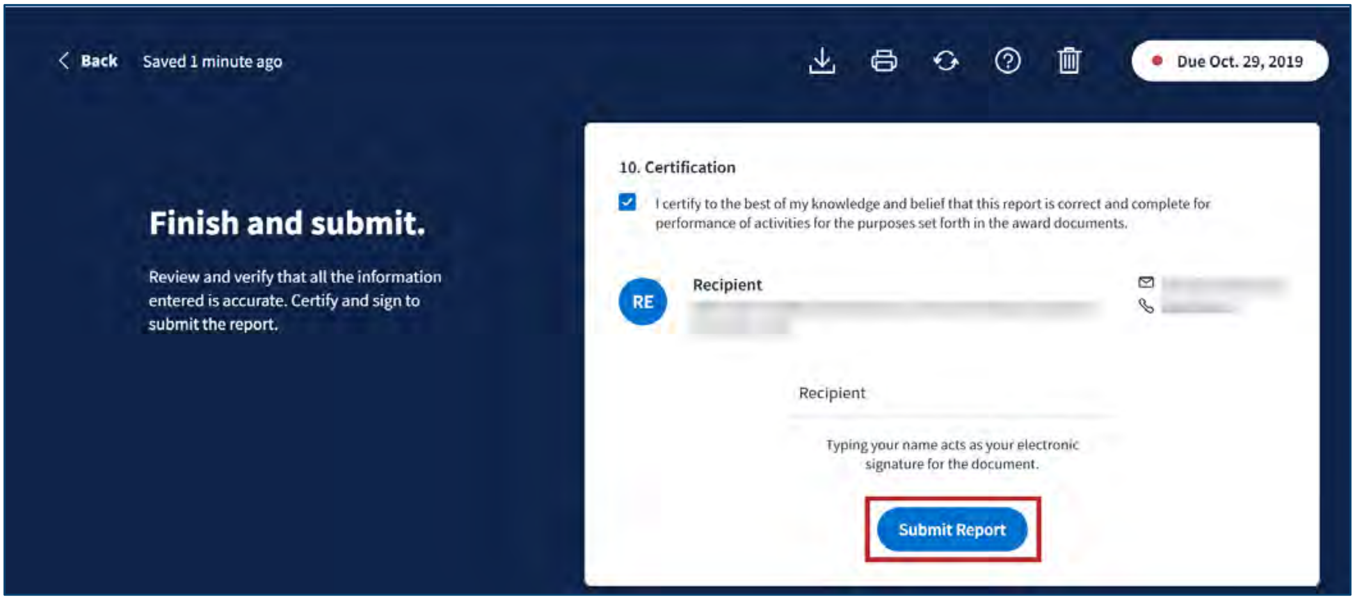

Figure 29: PPR screen with Submit Report button

9. 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.

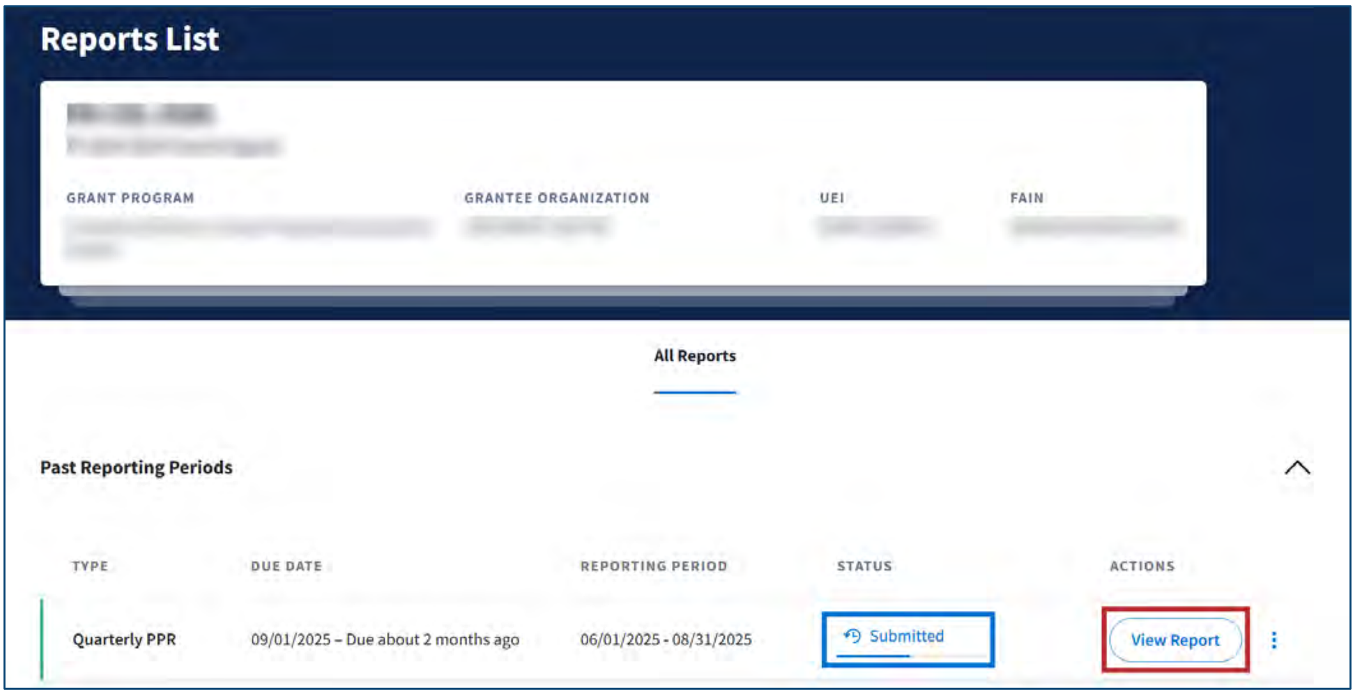

Figure 30: Reports List screen with Submitted status and View Report button

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.

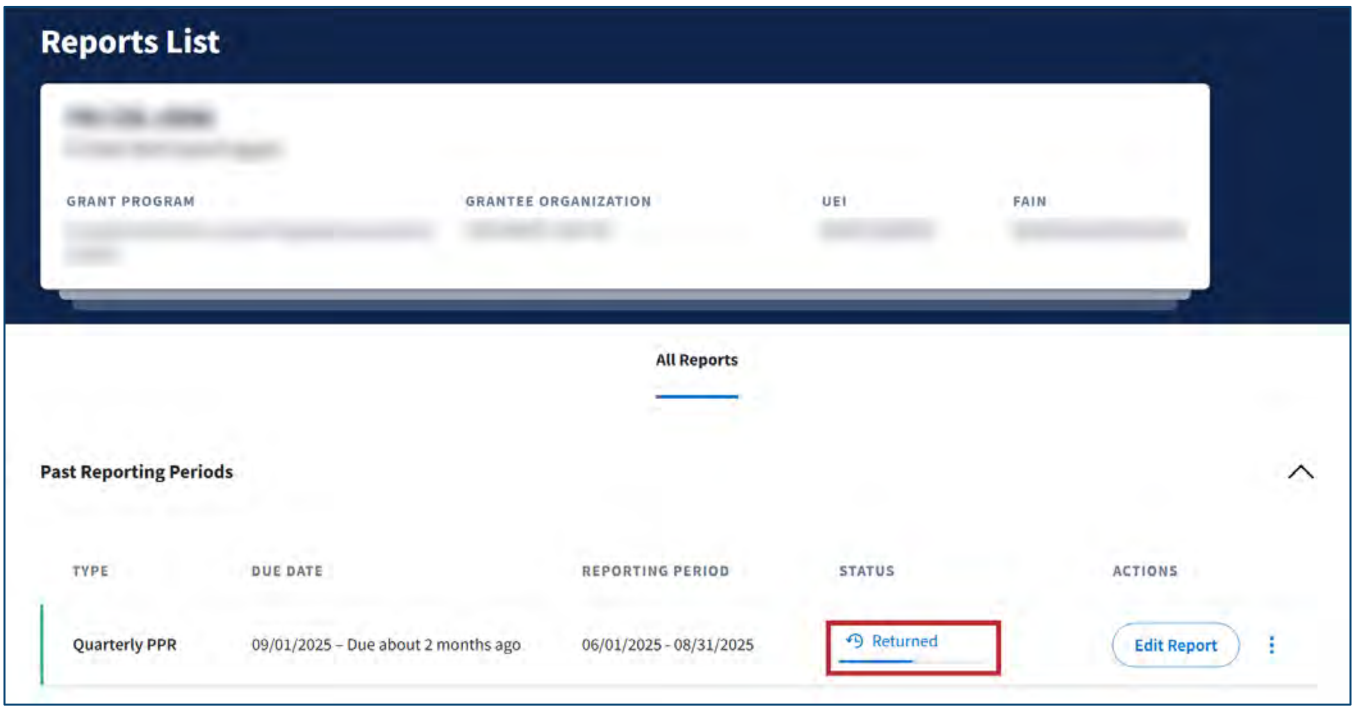

Figure 31: Reports List screen with Returned status button

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

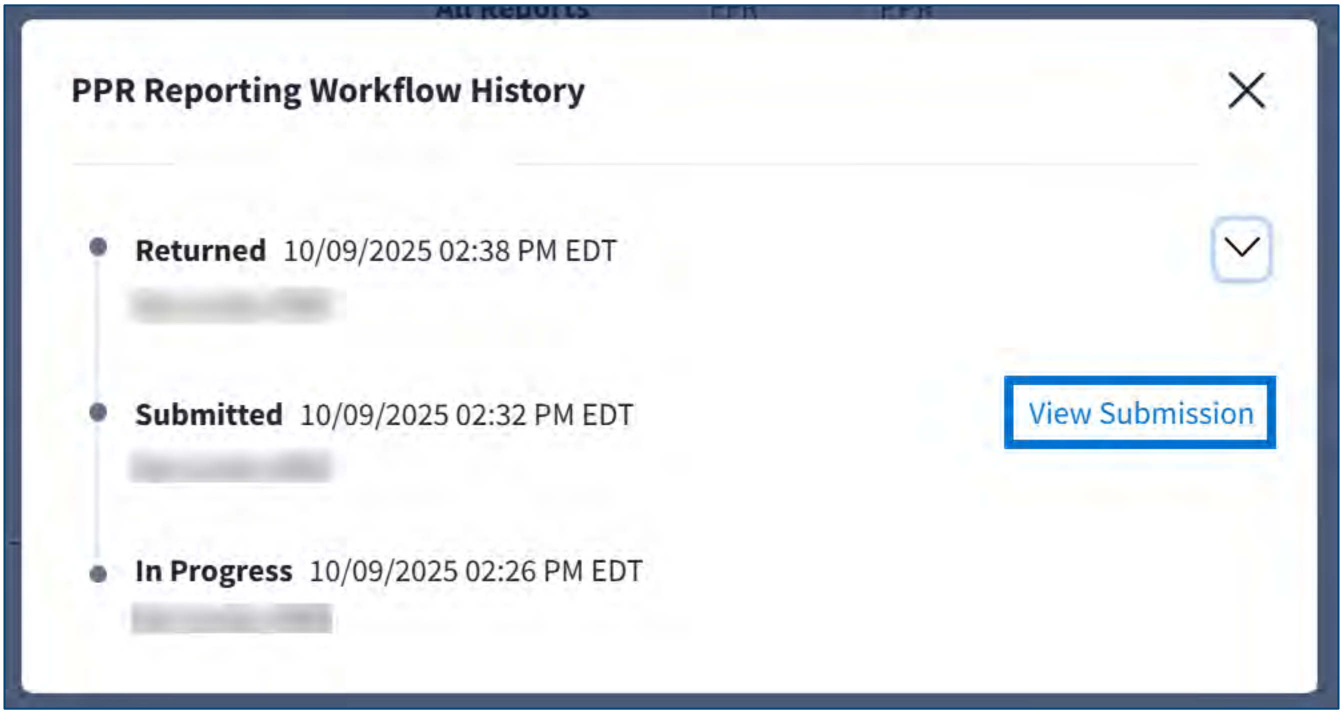

Figure 32: PPR Reporting Workflow History window with View Submission button

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.

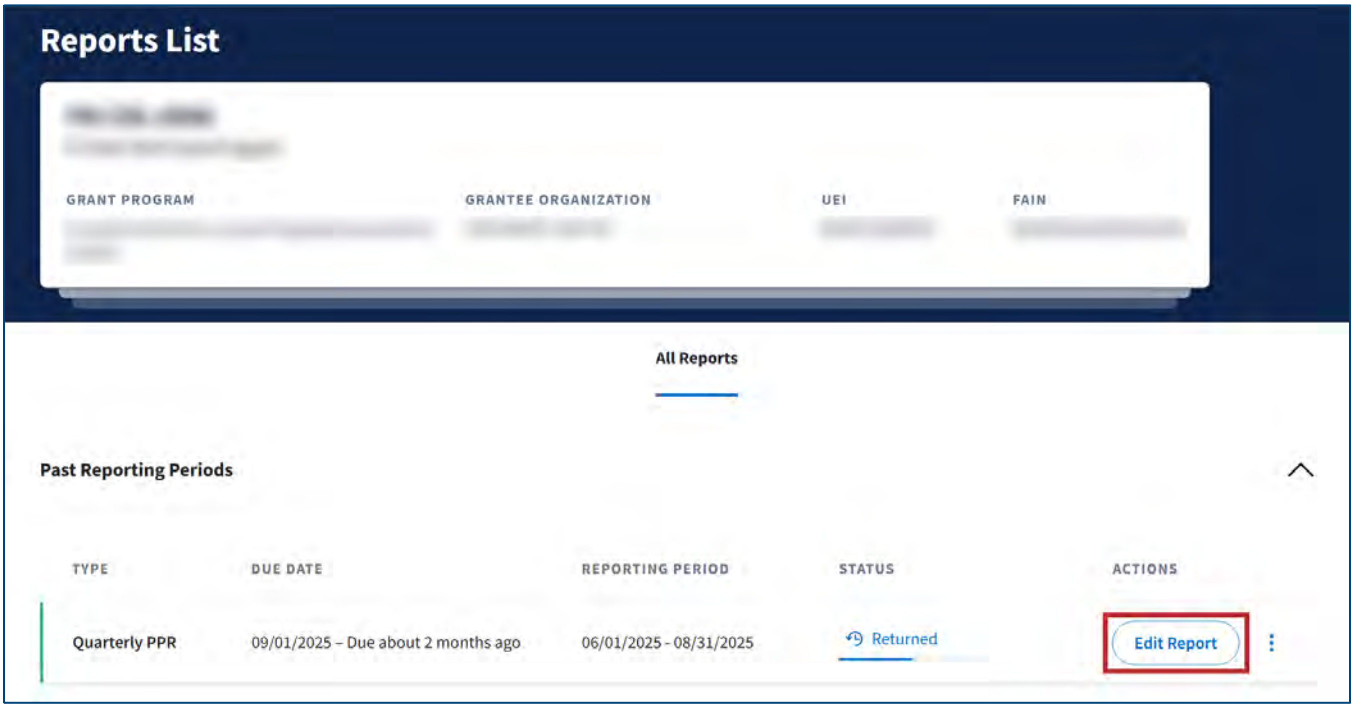

Figure 33: Reports List screen with Edit Report button