



# GrantSolutions

Grant Recipient Process: Performance Progress Report

March 2020

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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.

### PPR 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 PPR
- *Returned*: Grantor has returned the PPR to the Grant Recipient for edits

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

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

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

## NOTIFICATIONS

Grant Recipients that can edit and 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 Grantor returns the PPR for changes
- When the Grantor accepts the PPR

## Login and Access the Performance Progress Reports List

The GrantSolutions “Performance Progress Reports List” contains all PPRs for a Grant Project, grouped by the current reporting period, past reporting periods, and upcoming reporting periods.

To log into GrantSolutions and access the “Performance Progress Reports List,” complete the following steps:

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

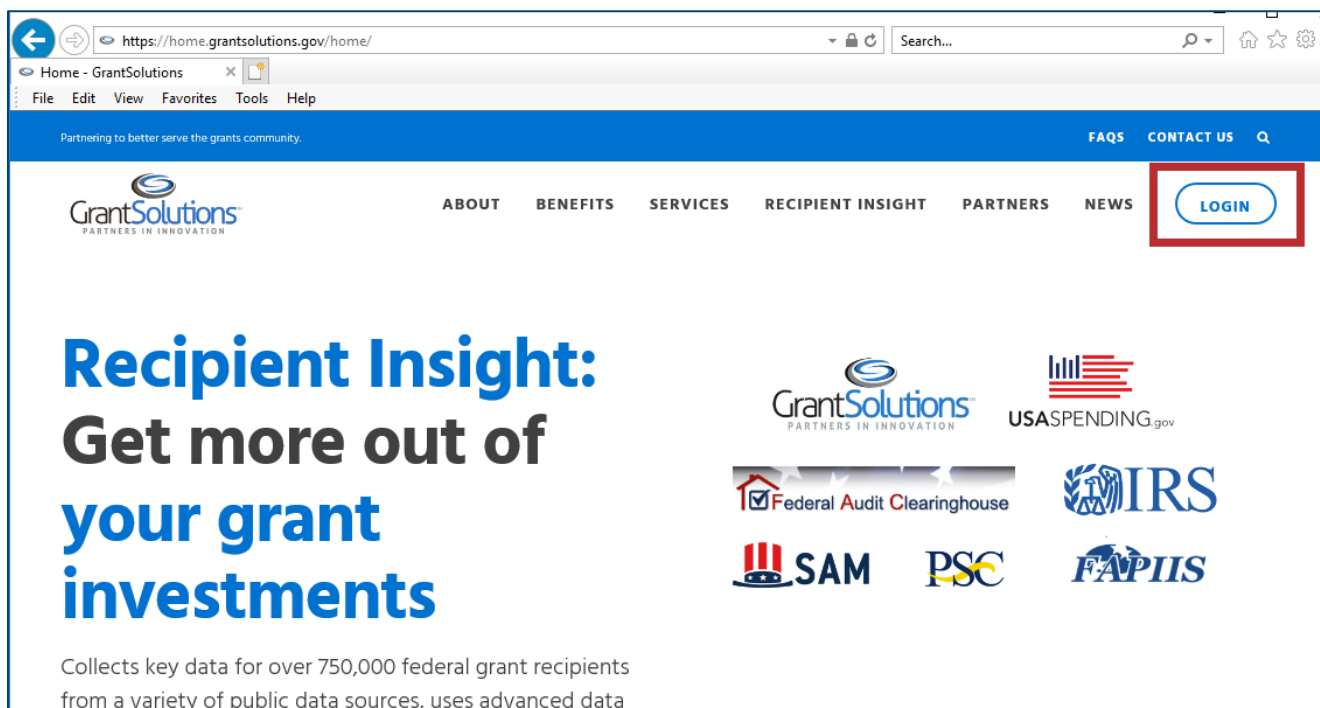


Figure 1: GrantSolutions Home page - Login button

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

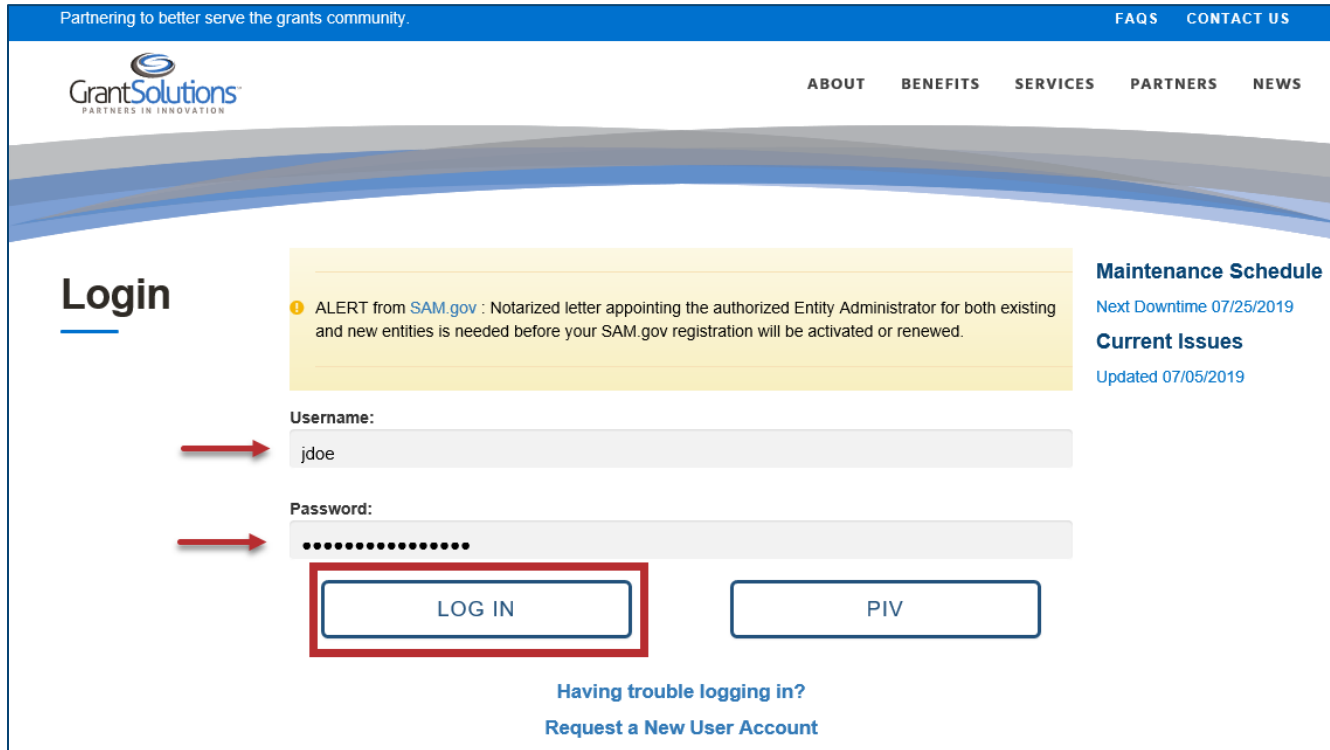


Figure 2: GrantSolutions Login screen

3. The “My Grants List” screen appears. With this release, users on the “My Grants List” screen click the **Reports** link for the desired Grant Program to access both FFRs and Performance Progress Reports (PPR).

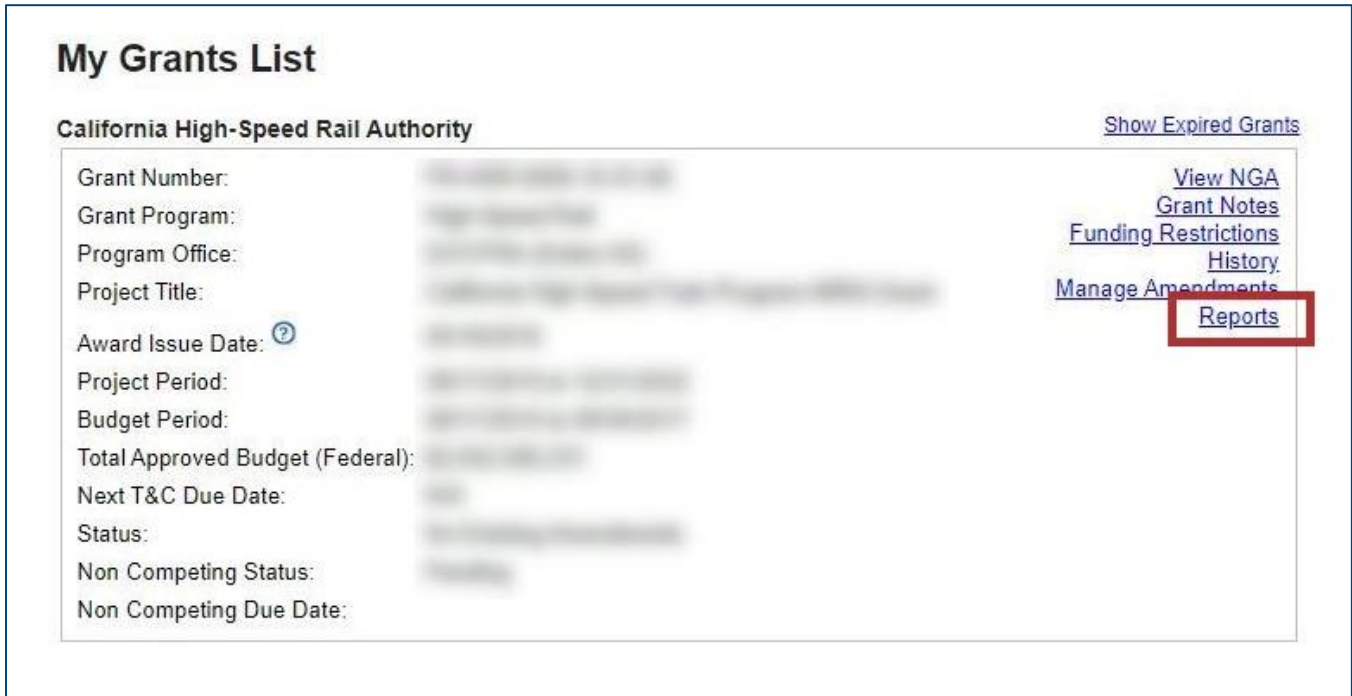
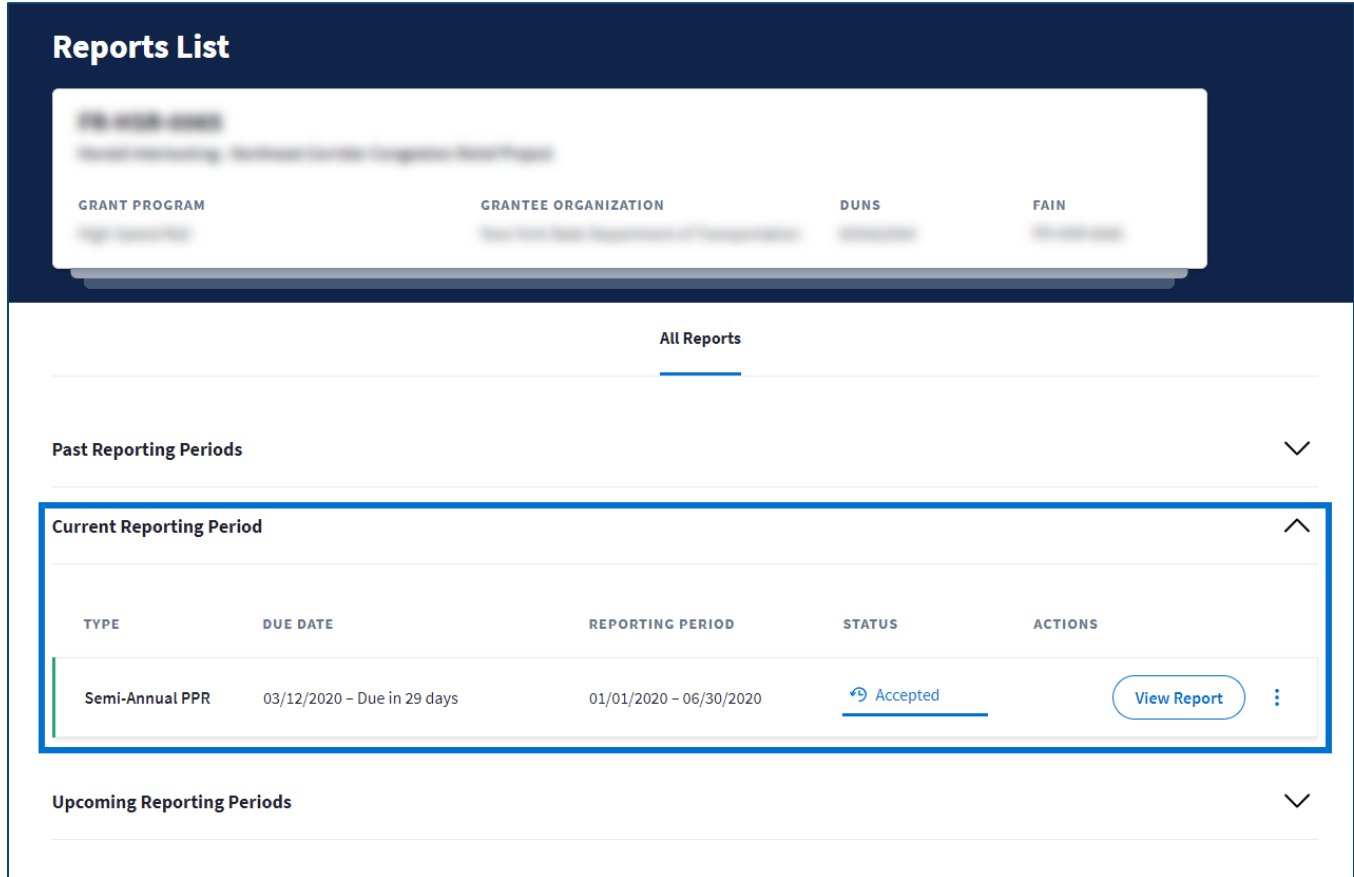


Figure 3: My Grants List screen with Reports link

4. The “Reports List” screen displays applicable reports in list format with the *Current Reporting Period* section open by default.



**Reports List**

GRANT PROGRAM GRANTEE ORGANIZATION DUNS FAIN

**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	View Report

Upcoming Reporting Periods

Figure 4: Reports List screen with Current Reporting Period section

## NAVIGATION

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*, *DUNS*, and *FAIN*.

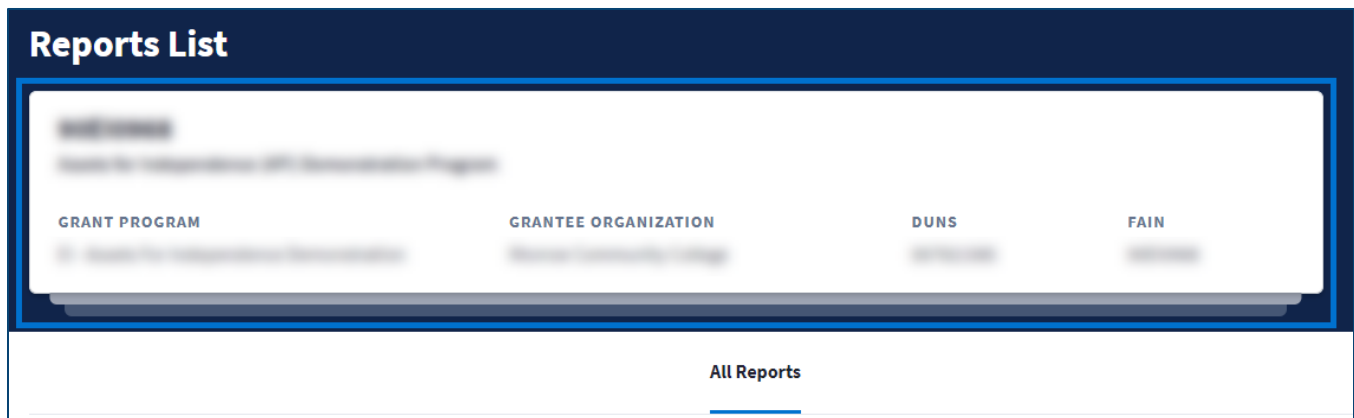


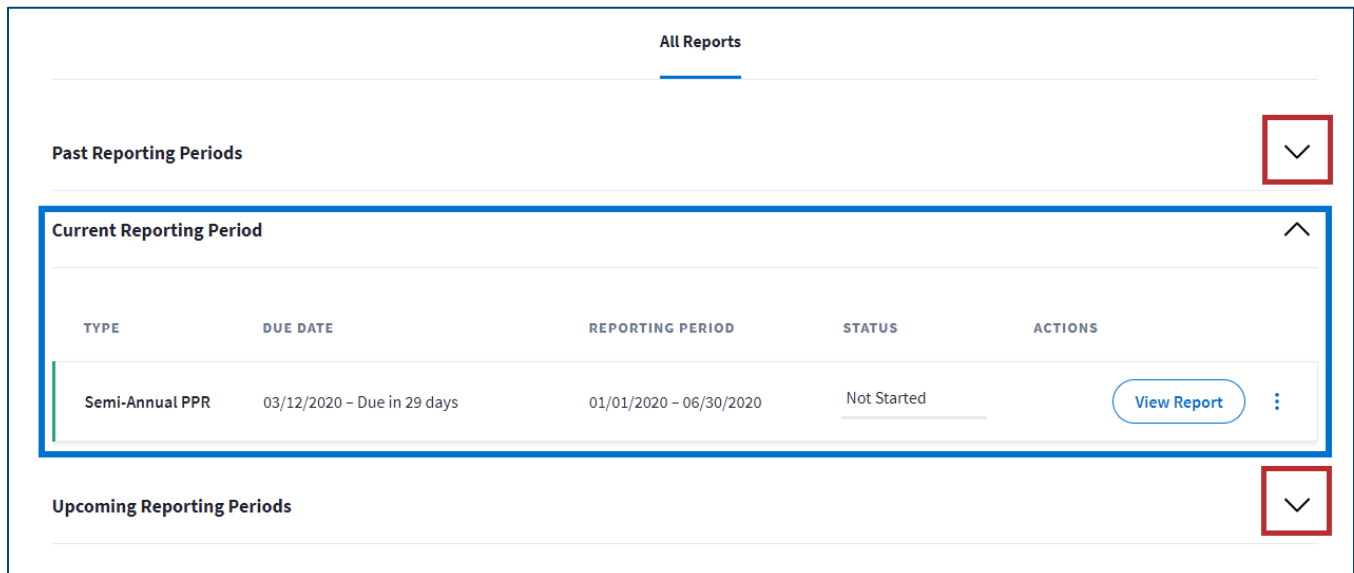
Figure 5: Reports List screen with Project Information



Just below the *Project Information* section are three Reporting Period groups: *Past Reporting Periods*, *Current Reporting Period*, and *Upcoming Reporting Periods*. By default, the *Current Reporting Period* row is expanded.

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.



The screenshot displays the 'All Reports' section of the system. It is organized into three collapsible groups:

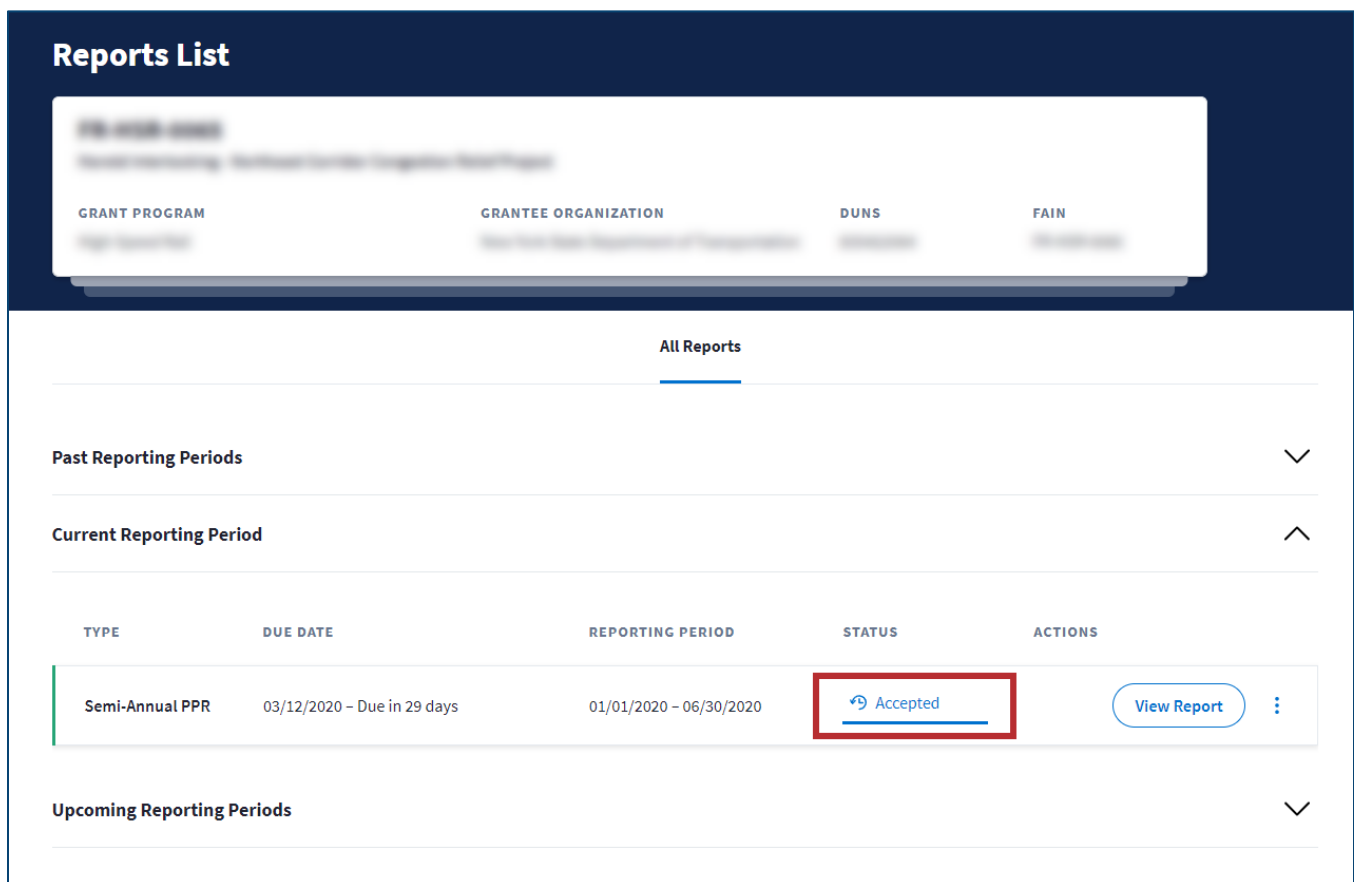
- Past Reporting Periods:** Indicated by a down arrow icon (∨) in a red box on the right.
- Current Reporting Period:** This group is expanded, showing a table with the following data:

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	<a href="#">View Report</a> ⋮
- Upcoming Reporting Periods:** Indicated by a down arrow icon (∨) in a red box on the right.

Figure 6: Reports List screen with 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. 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., In Progress, Submitted, etc.) to view the workflow history and any comments on the “PPR Reporting Workflow History” screen.



**Reports List**

GRANT PROGRAM GRANTEE ORGANIZATION DUNS FAIN

**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	View Report

Upcoming Reporting Periods

Figure 7: Reports List screen with Status button

- For any *Submitted* actions on the “PPR Reporting Workflow History” screen, 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) will not have a **View Submission** option.

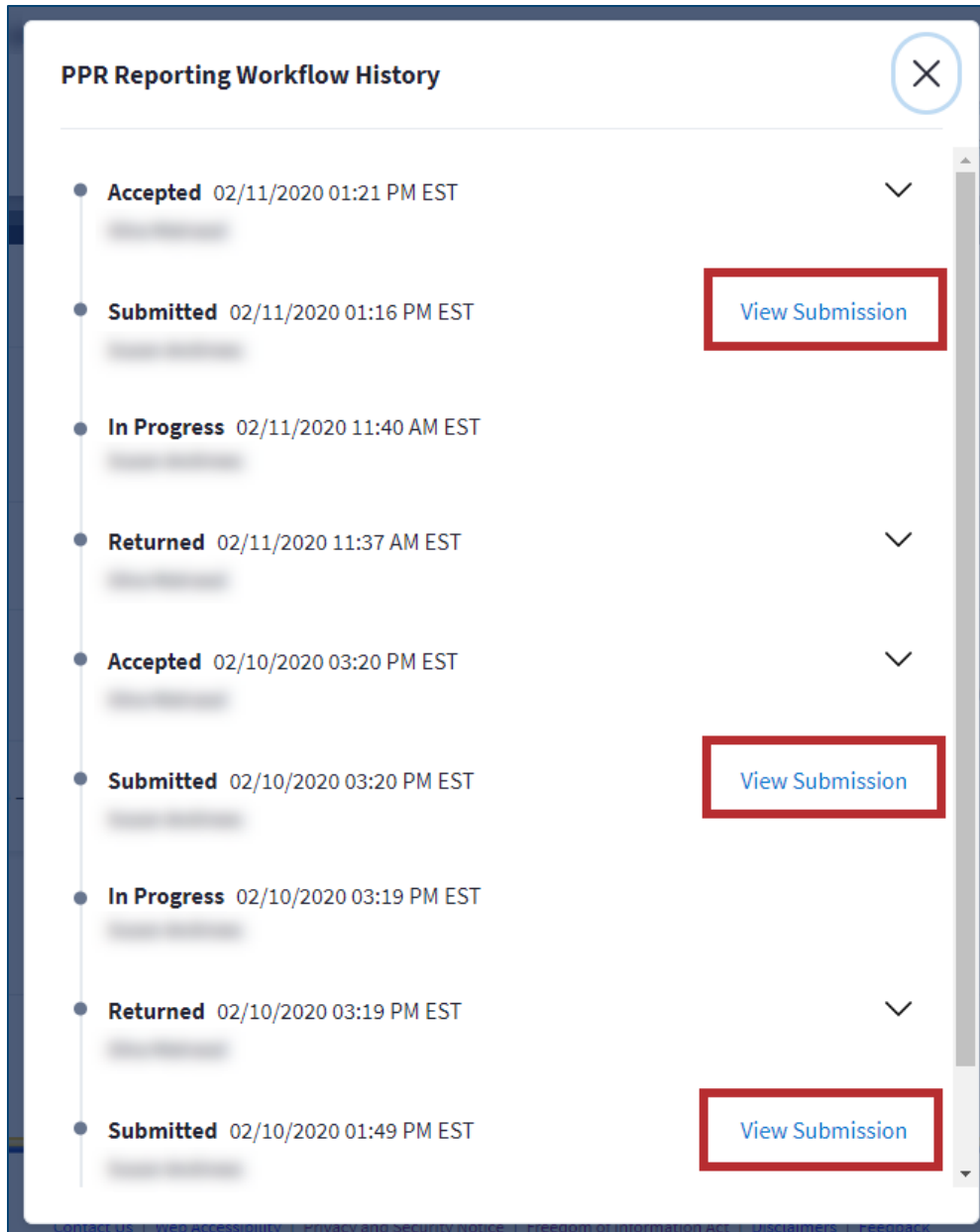


Figure 8: PPR Reporting Workflow History screen with View Submission buttons

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

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	Not Started	<a href="#">View Report</a>

Figure 9: Action button – View Report

- **Actions List icon (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*.

### Reports List

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN

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>

Upcoming Reporting Periods

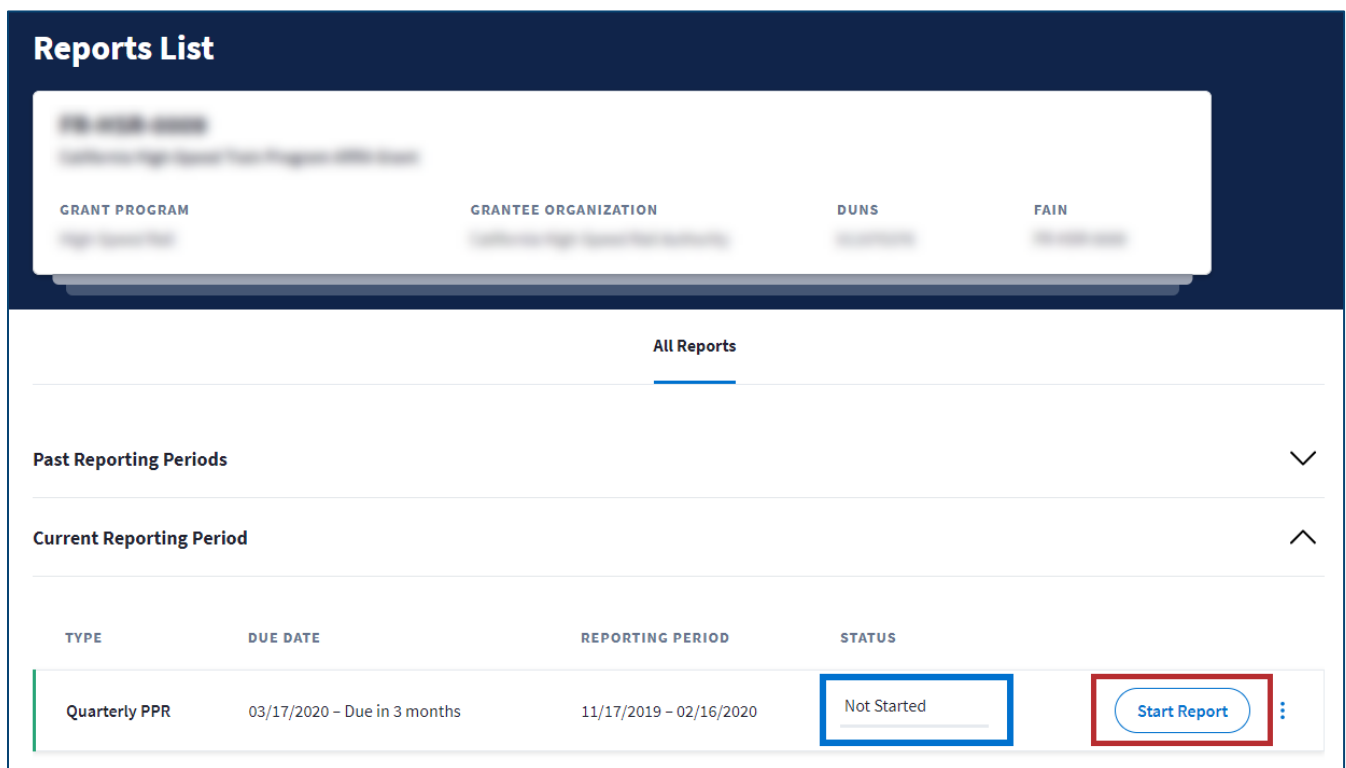
Figure 10: Reports List screen with ellipsis button options

## Complete and Submit PPR

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

To complete and submit a PPR:

1. Review the available reports on the “Reports List” screen. Select a PPR with the *Not Started* status and click the **Start Report** button.



**Reports List**

SEARCH BAR

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN

**All Reports**

Past Reporting Periods (collapsed)

Current Reporting Period (expanded)

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

Figure 11: Reports List screen with Not Started status and a Start 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, to avoid loss of information, the PPR automatically saves as Grant Recipients enter data.

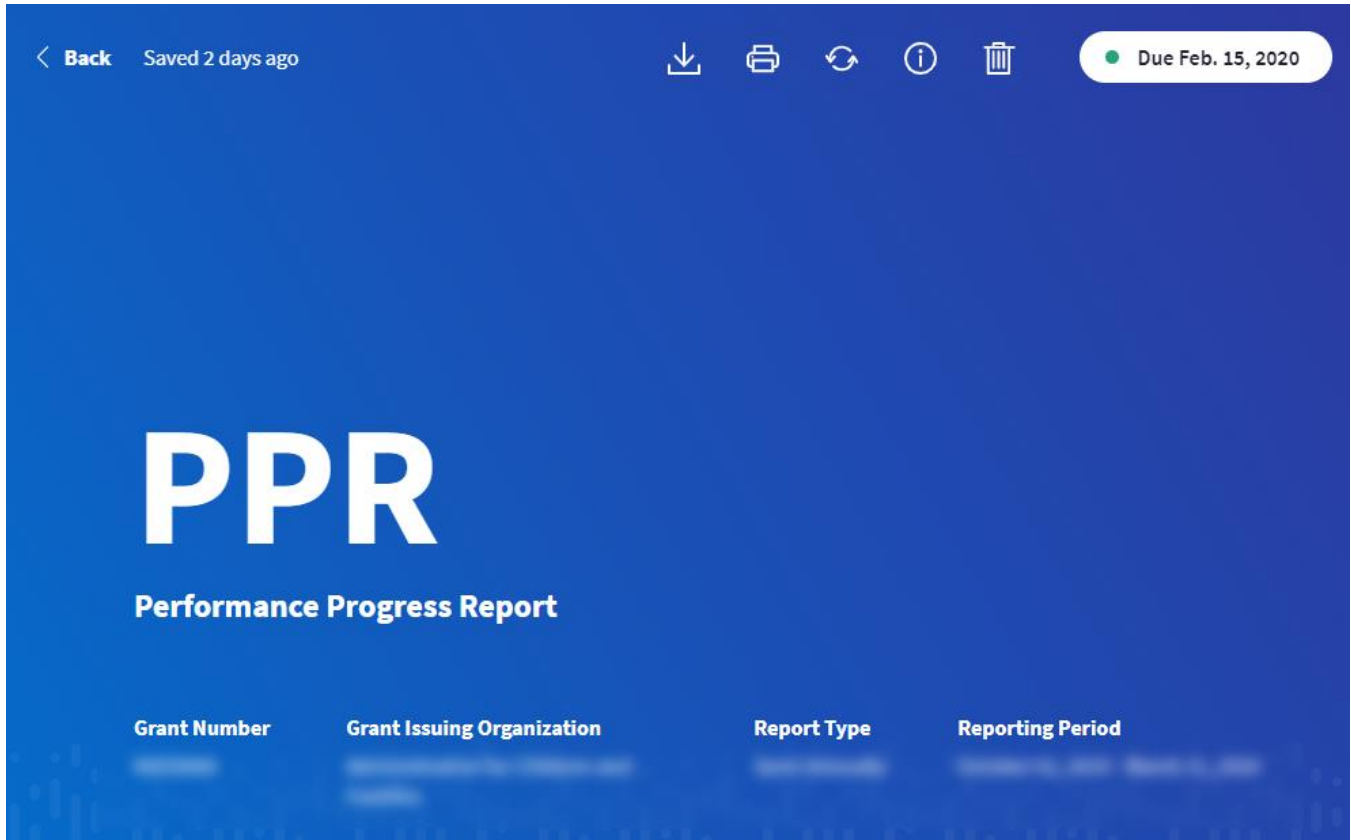


Figure 13: Performance Progress Report screen

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 Grant Recipients 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 14: PPR header line with *In Progress* Delete button included

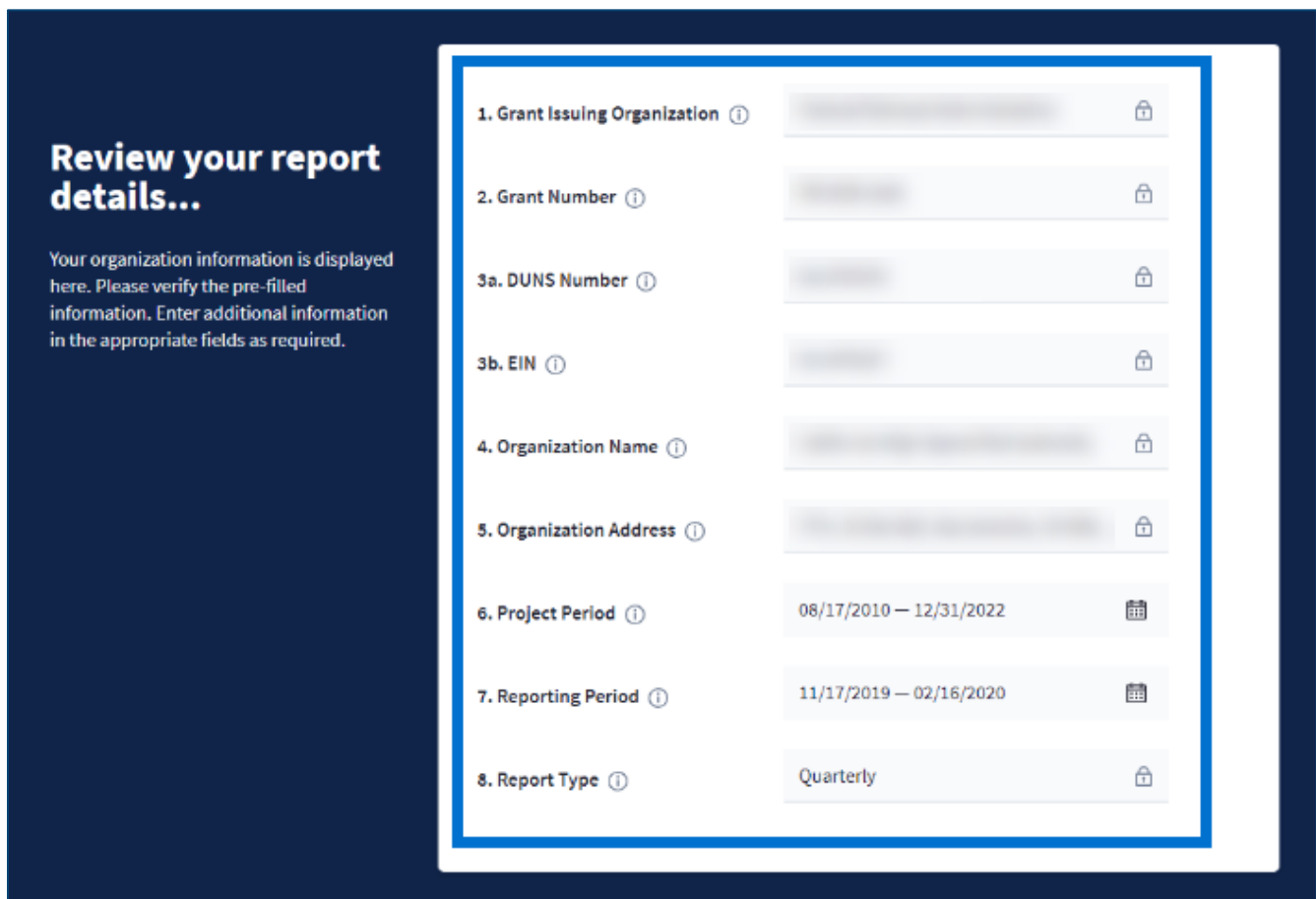


3. Scroll down the page to begin entering report data.

The left side of the screen describes the purpose of a section and any instructions. For example, *Review your report details (Error! Reference source not found.* Performance Progress Report screen with Review Your Report Details section) instructs Recipients 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 to enter data. Pre-filled information is generally read-only when followed by the lock (🔒) icon.

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



**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	████████████████████	ℹ️ 🔒
2. Grant Number	██████████	ℹ️ 🔒
3a. DUNS Number	██████████	ℹ️ 🔒
3b. EIN	██████████	ℹ️ 🔒
4. Organization Name	████████████████████	ℹ️ 🔒
5. Organization Address	████████████████████	ℹ️ 🔒
6. Project Period	08/17/2010 — 12/31/2022	ℹ️ 📅
7. Reporting Period	11/17/2019 — 02/16/2020	ℹ️ 📅
8. Report Type	Quarterly	ℹ️ 🔒

Figure 15: Performance Progress Report screen with 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

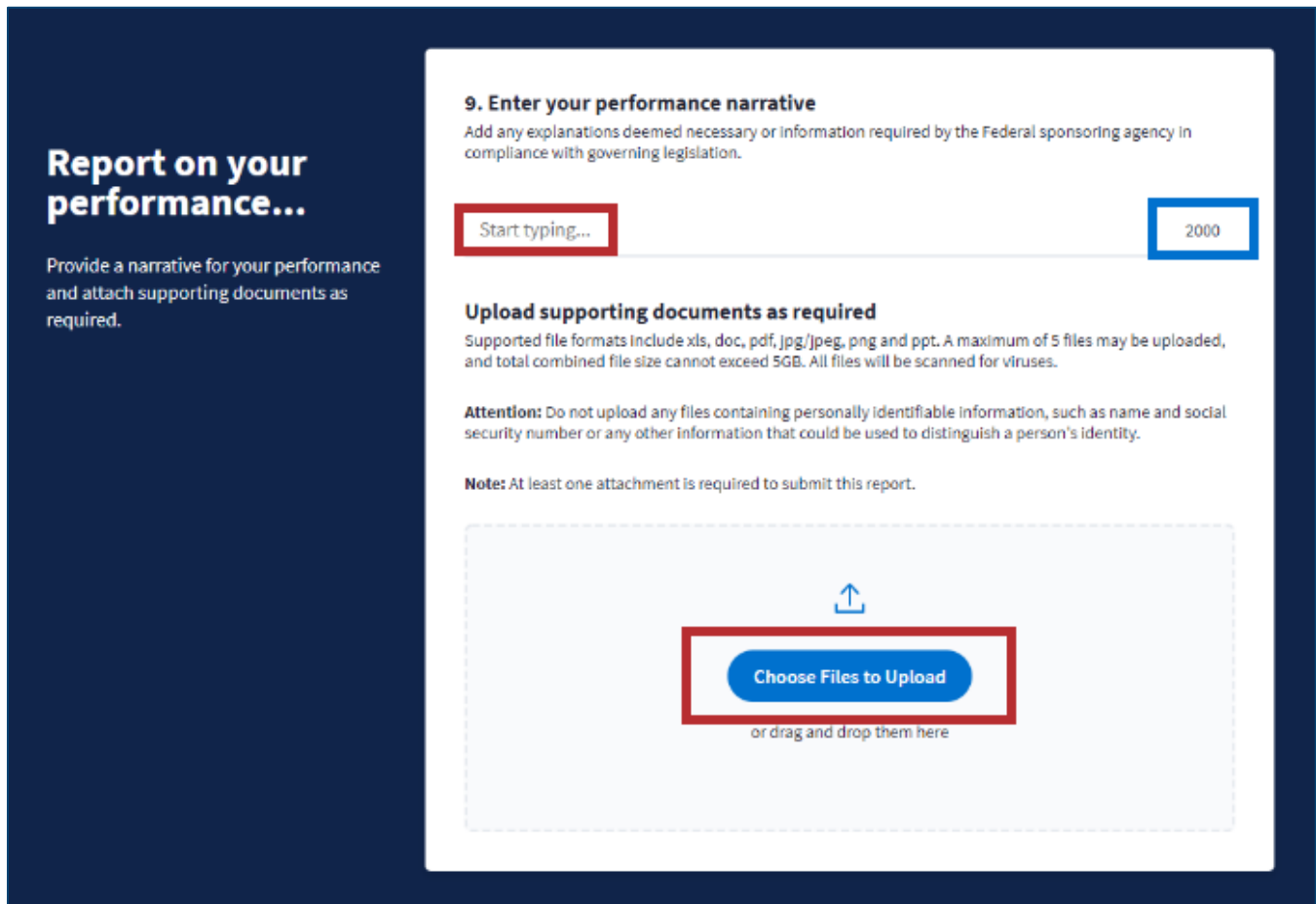


Figure 16: Performance Progress Report screen with performance narrative line and Choose Files to Upload button

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.

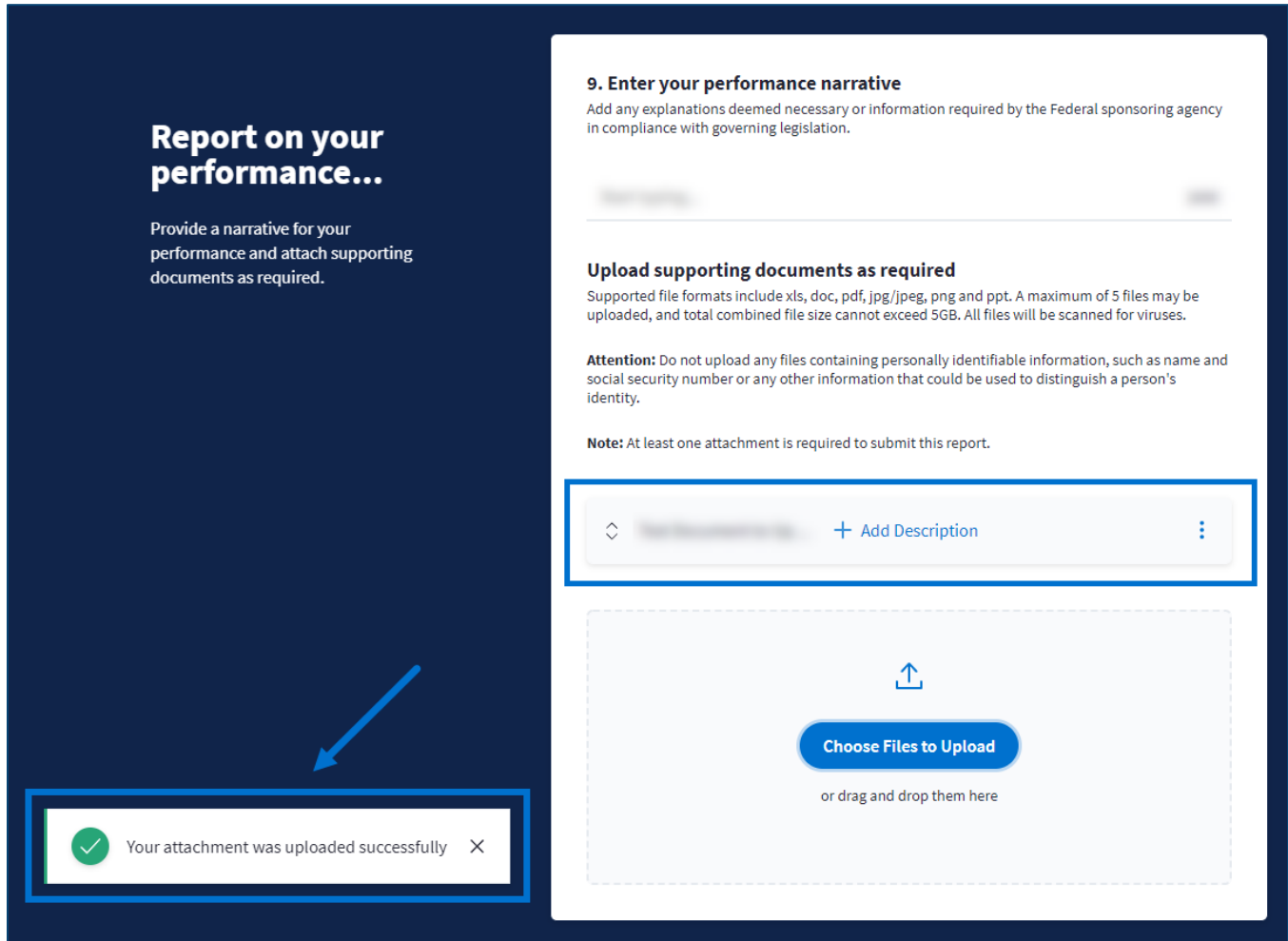
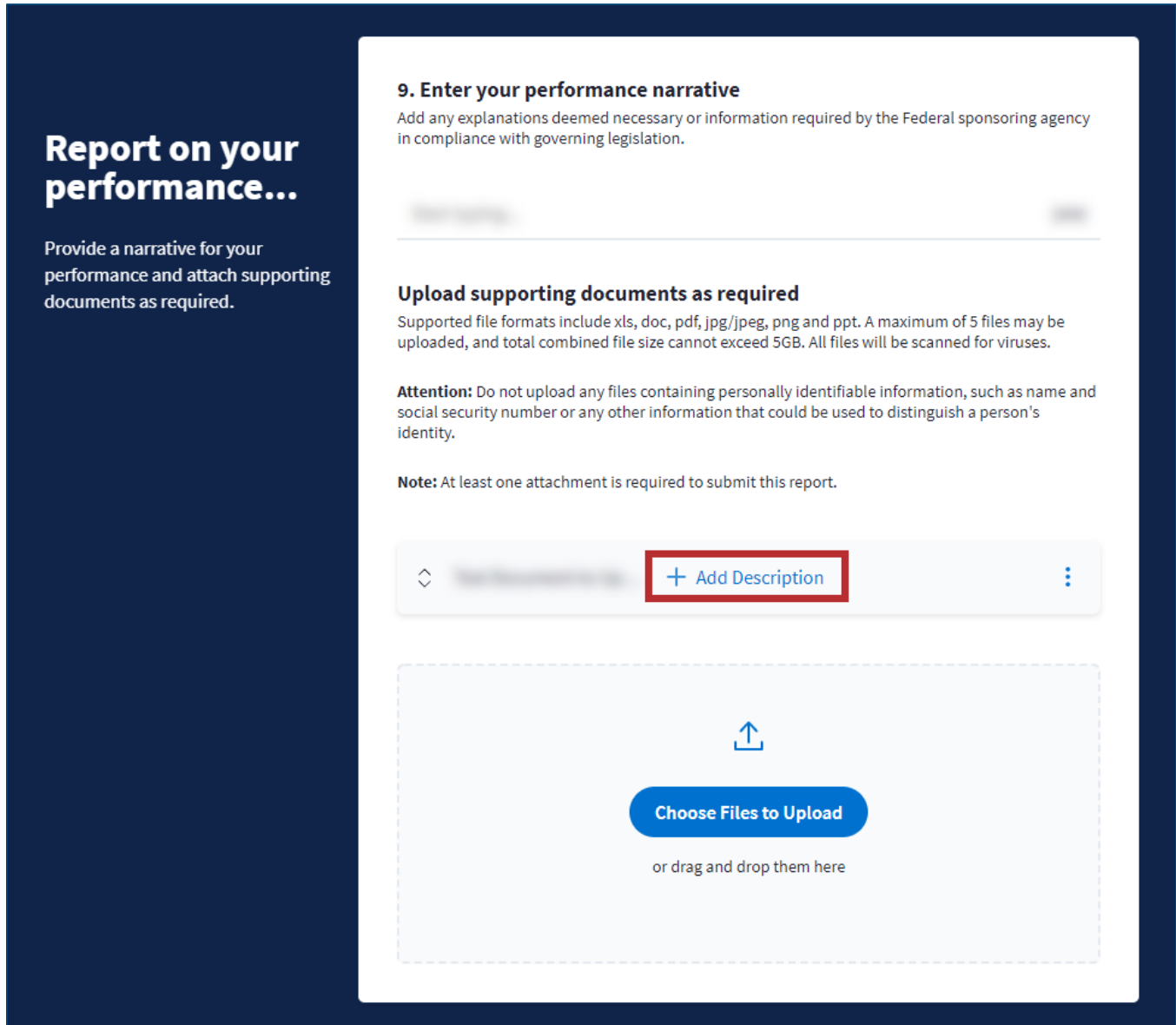


Figure 17: Performance Progress Report screen with Your attachment was uploaded successfully message

- 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 18: Performance Progress Report 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.

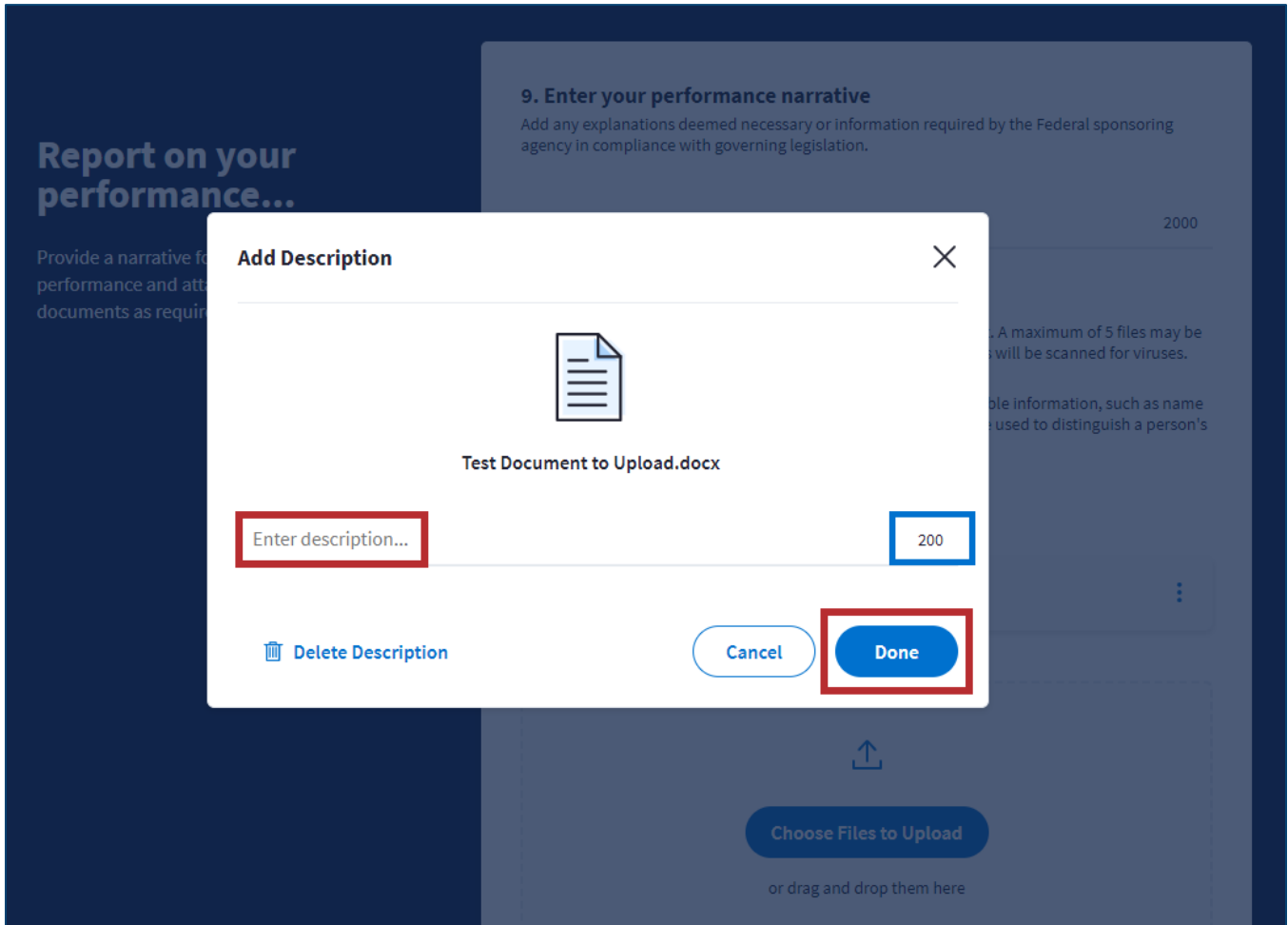


Figure 19: Add Description screen with Enter description line and Done button

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.

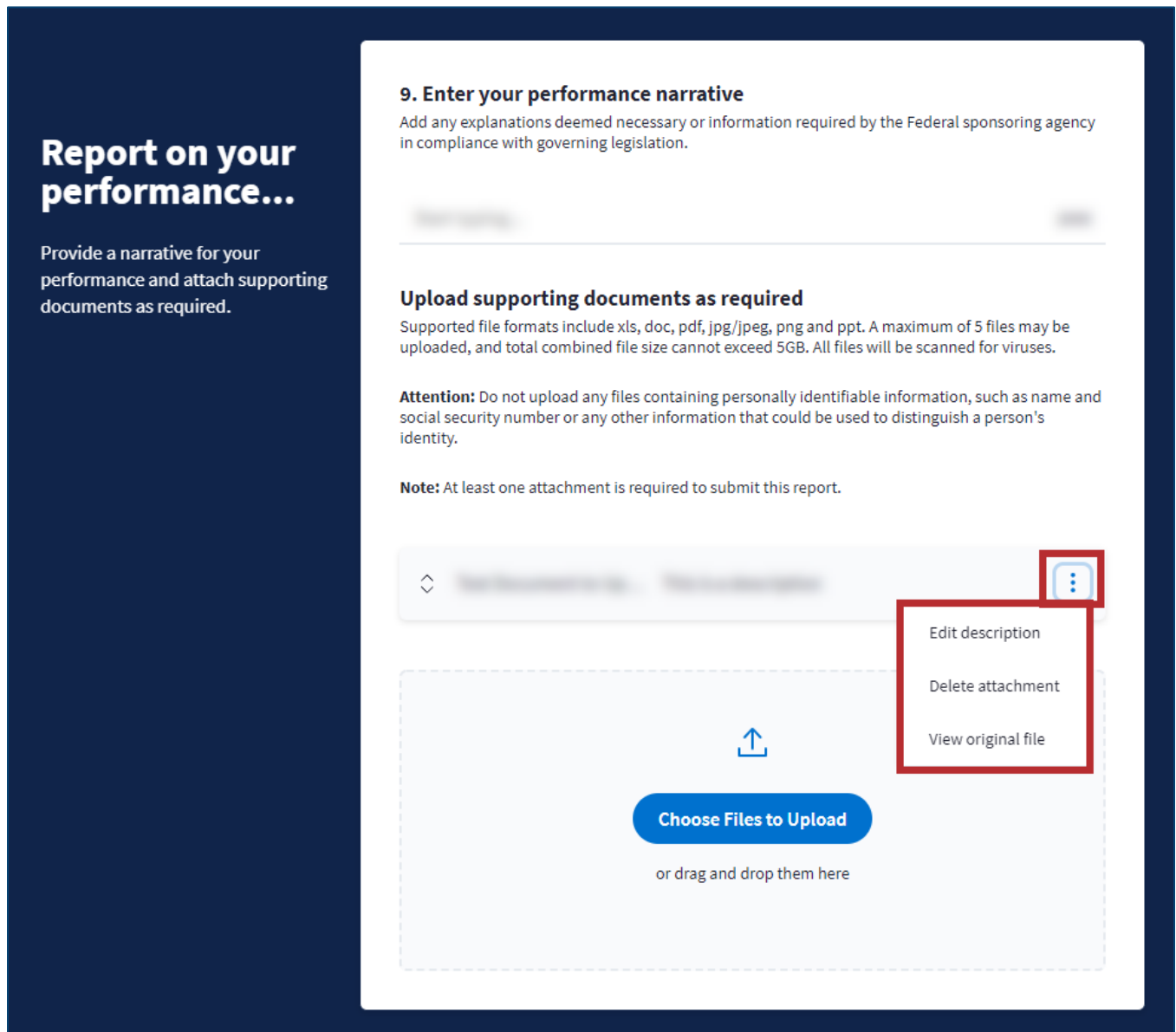


Figure 20: Performance Progress Report screen with ellipsis button options

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

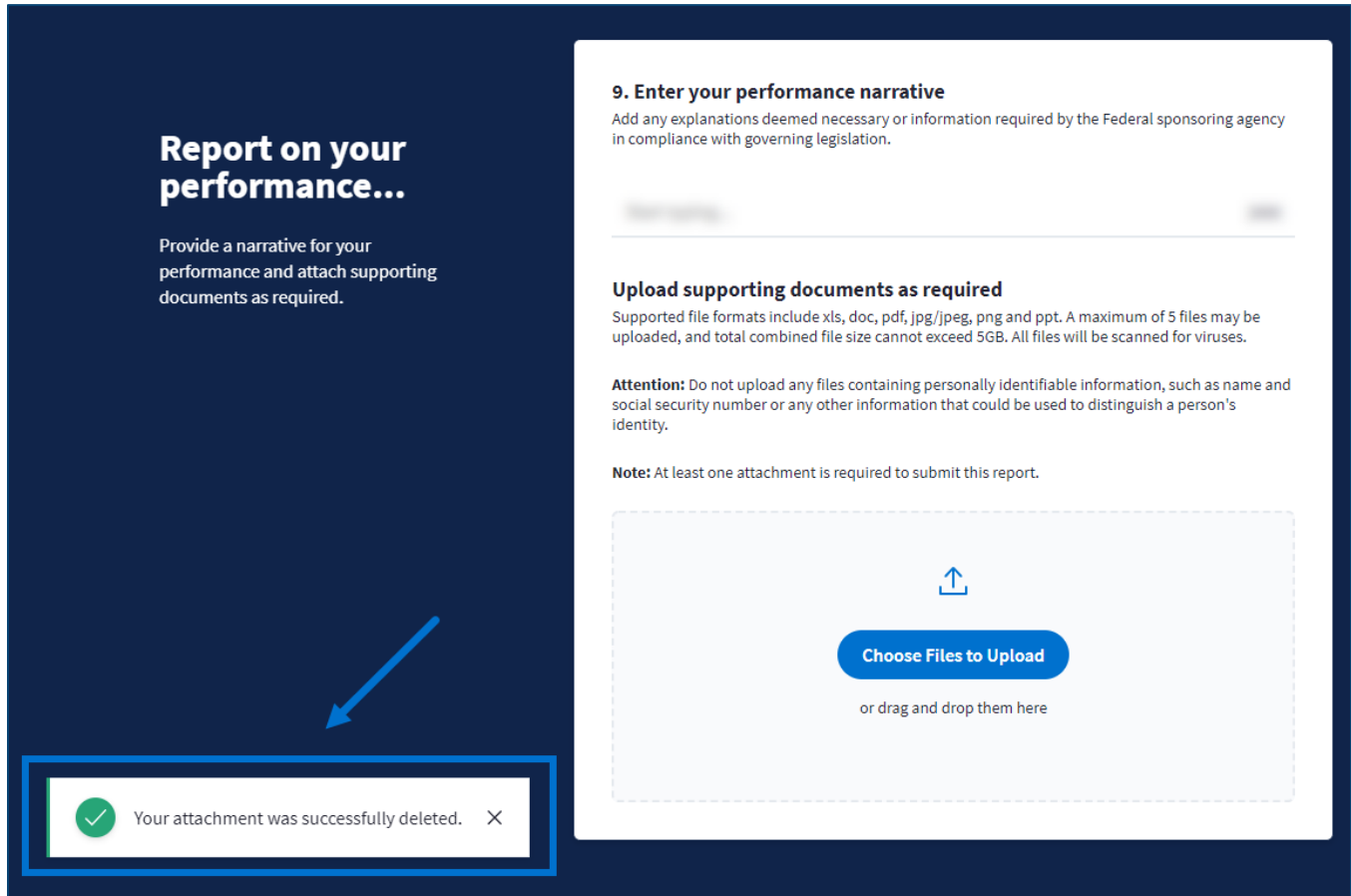


Figure 21: Performance Progress Report screen with Your attachment was successfully deleted message

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.

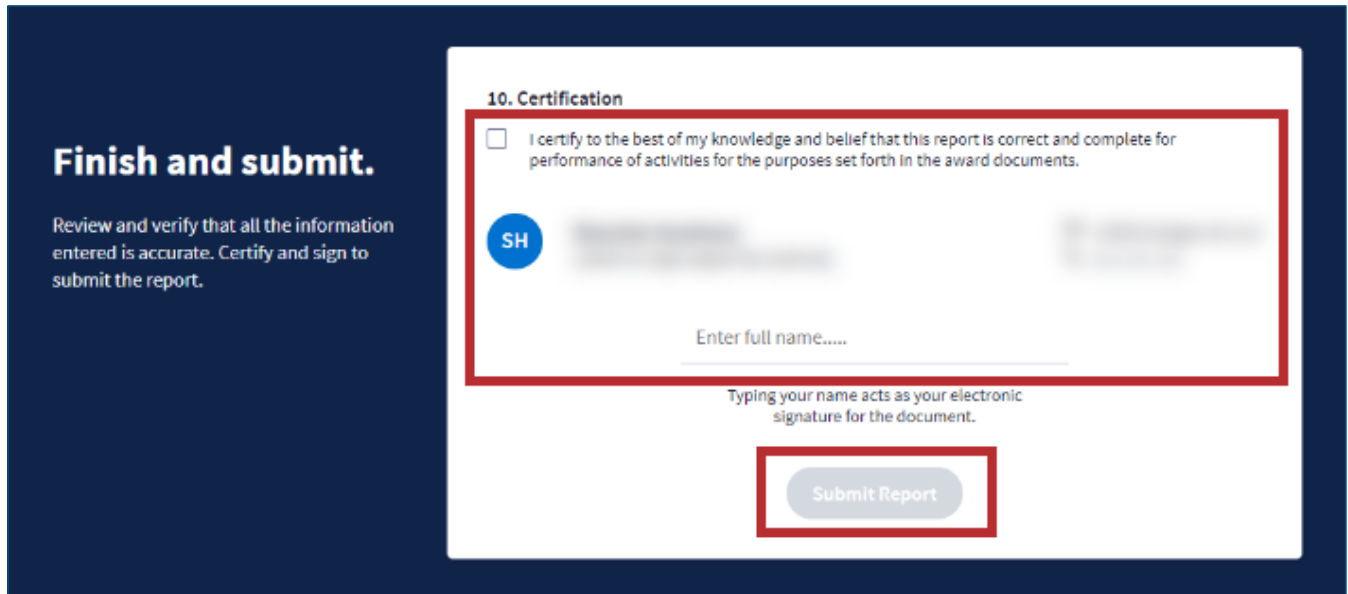


Figure 22: Performance Progress Report screen with Certification line and Submit Report button

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

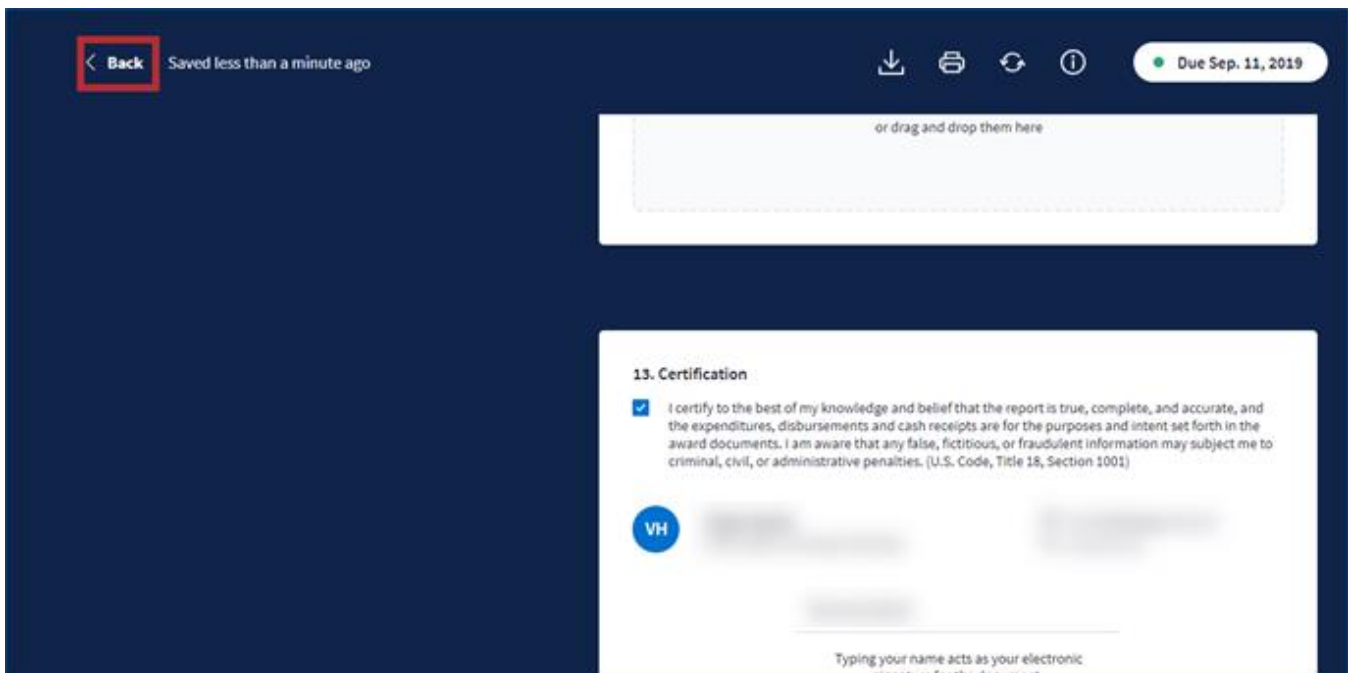
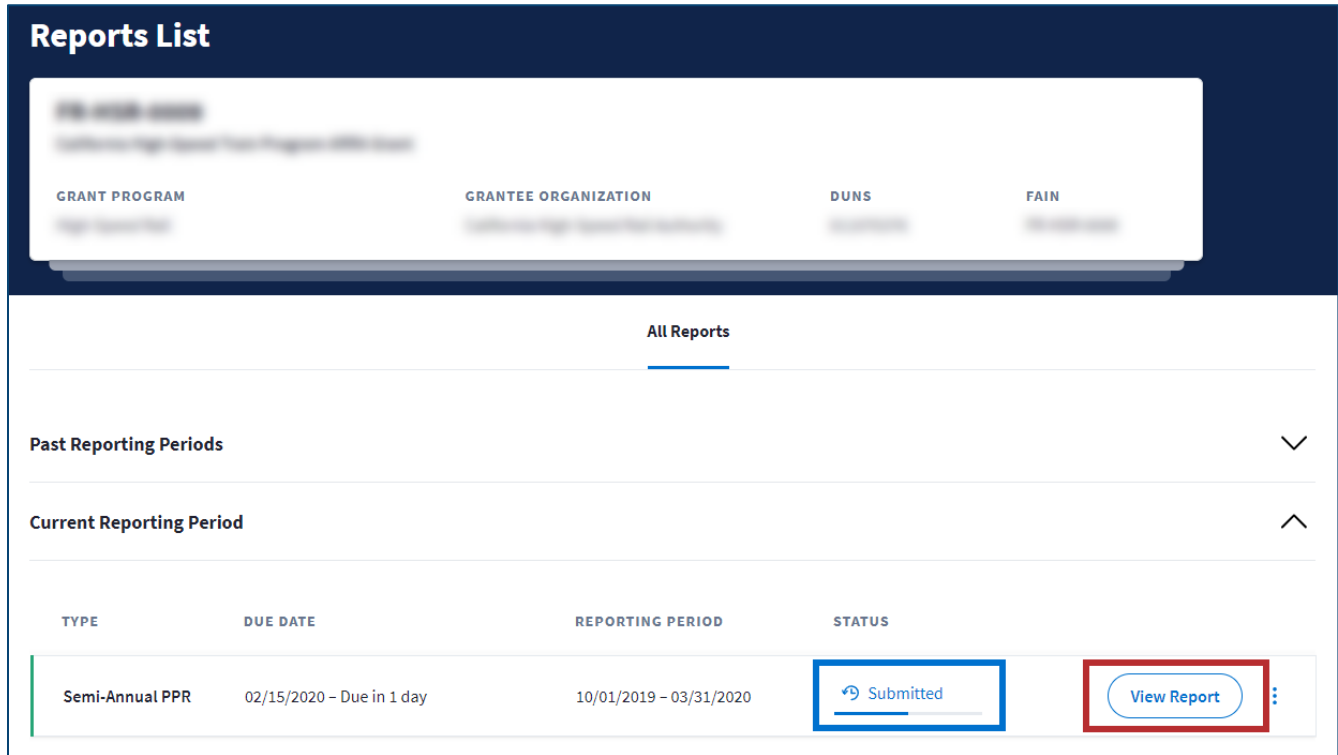


Figure 23: Successful message and Back button



11. The “Reports List” screen appears and 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.



**Reports List**

SEARCH

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN

All Reports

Past Reporting Periods

Current Reporting Period

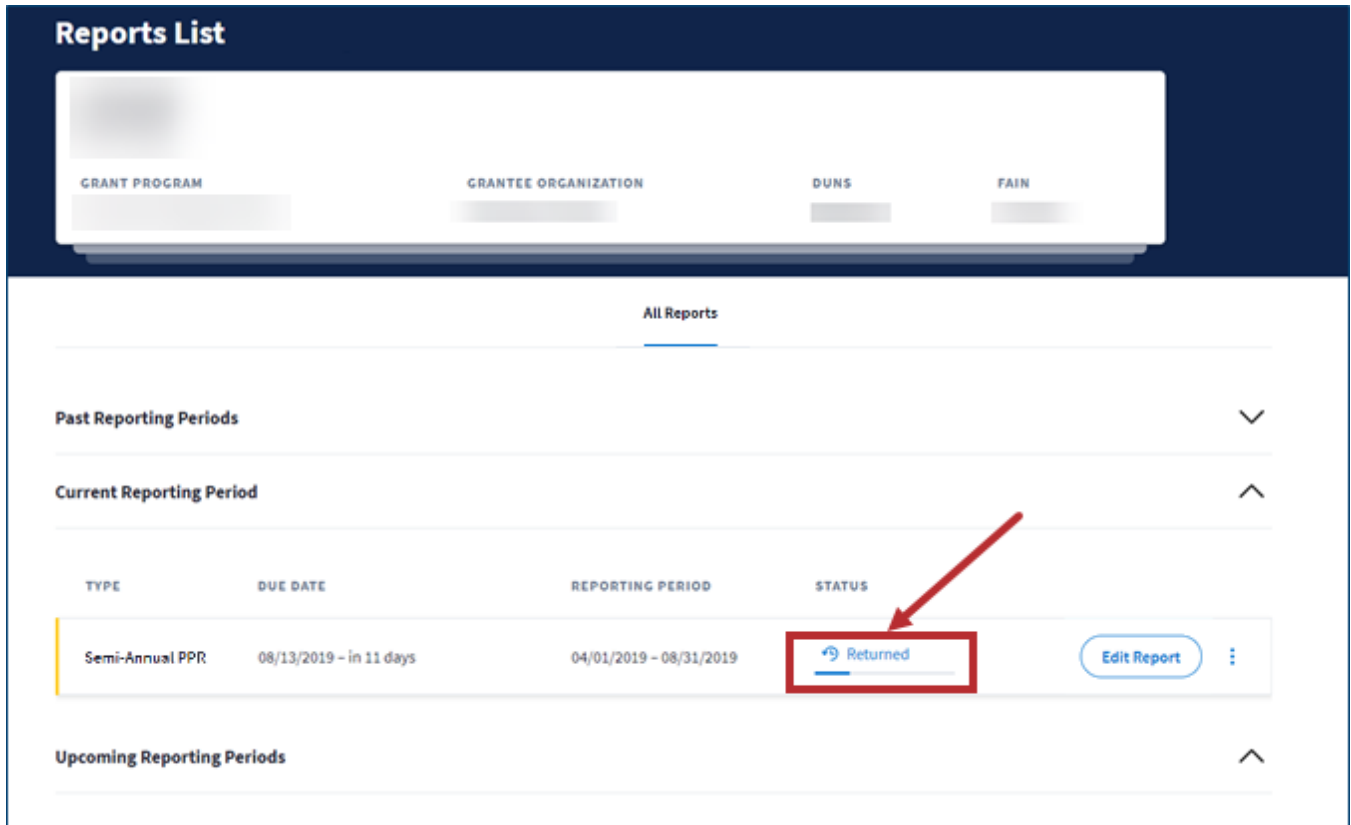
TYPE	DUE DATE	REPORTING PERIOD	STATUS
Semi-Annual PPR	02/15/2020 - Due in 1 day	10/01/2019 - 03/31/2020	Submitted

View Report

Figure 24: Reports List screen with Submitted status and a View Report button

## Returned Report

Federal staff may return a report to the Grant Recipient for modifications. Additionally, the originally submitted report is saved as a PDF to the workflow history and is visible from the **Status** button.



The screenshot shows the 'Reports List' interface. At the top, there are filters for 'GRANT PROGRAM', 'GRANTEE ORGANIZATION', 'DUNS', and 'FAIN'. Below these is a section for 'All Reports' with expandable sections for 'Past Reporting Periods', 'Current Reporting Period', and 'Upcoming Reporting Periods'. A table lists reports with columns for 'TYPE', 'DUE DATE', 'REPORTING PERIOD', and 'STATUS'. One report is highlighted with a yellow bar, and its 'STATUS' is 'Returned', which is circled in red with an arrow pointing to it. An 'Edit Report' button is visible to the right of the report row.

TYPE	DUE DATE	REPORTING PERIOD	STATUS	
Semi-Annual PPR	08/13/2019 - in 11 days	04/01/2019 - 08/31/2019	Returned	Edit Report

Figure 25: Reports List screen with Returned status

The *PPR Reporting Workflow History* screen appears. Click the **View Submission** button to access the submitted report in PDF format. Click the **close** button in the top right corner to close the screen.

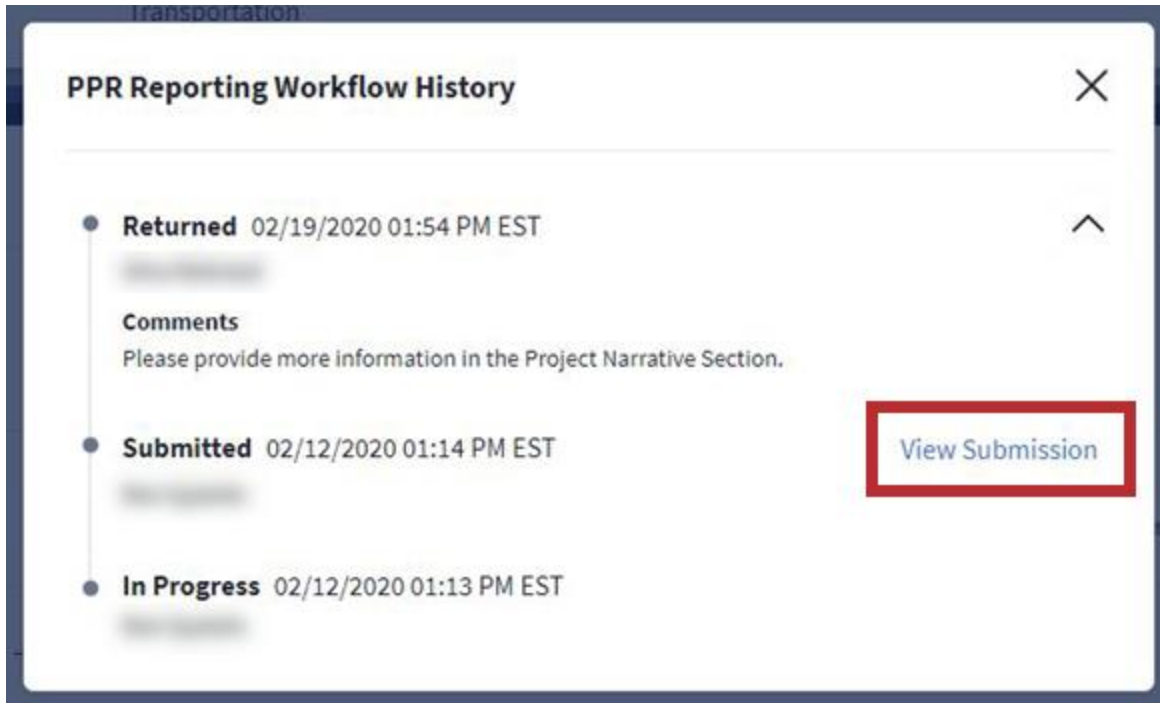
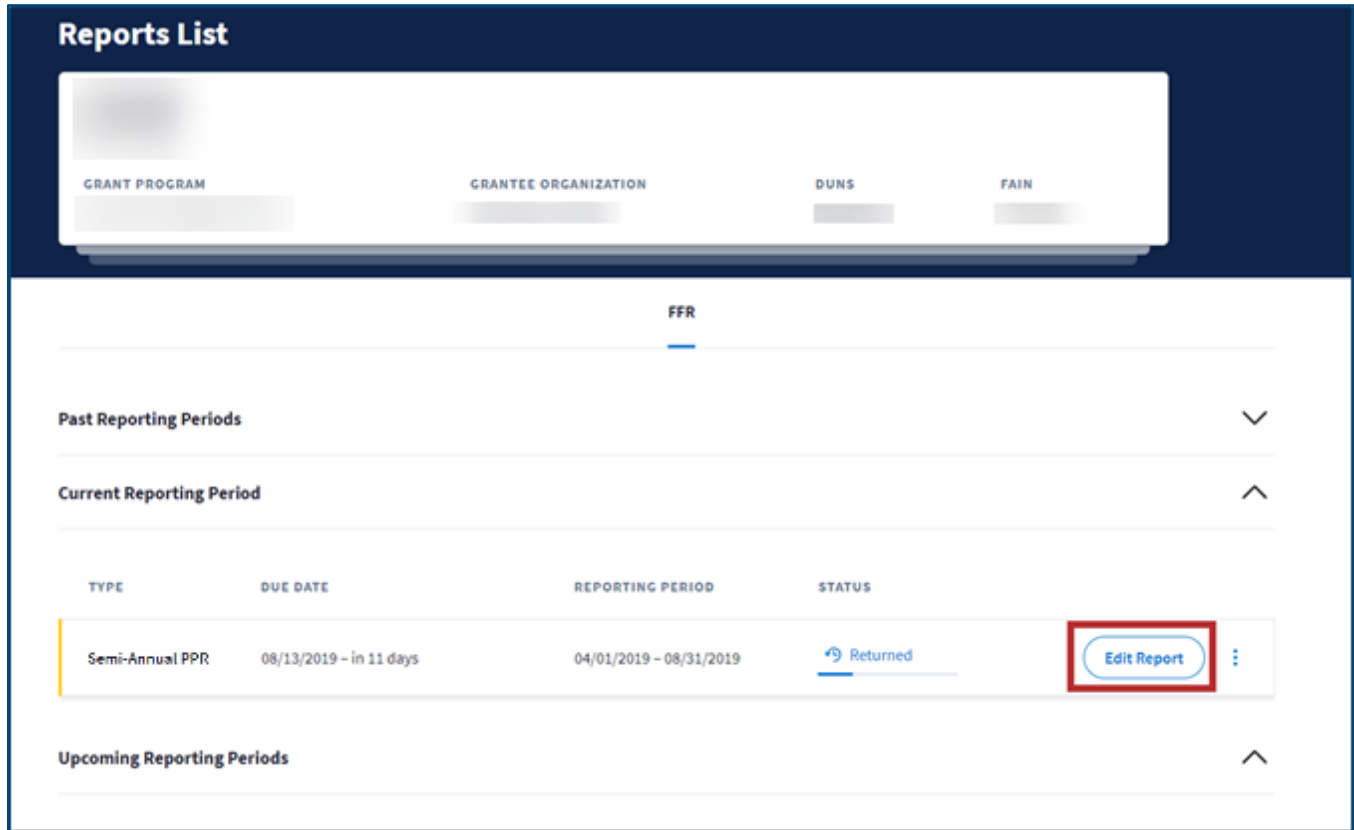


Figure 26: PPR Reporting Workflow History screen with View Submission button

A new editable report is automatically created and is pre-populated with information from the returned report, including attachments. Make the required changes and follow the steps to resubmit the PPR.



TYPE	DUE DATE	REPORTING PERIOD	STATUS	
Semi-Annual PPR	08/13/2019 - in 11 days	04/01/2019 - 08/31/2019	Returned	<a href="#">Edit Report</a>

Figure 27: Reports List screen with the Edit Report button