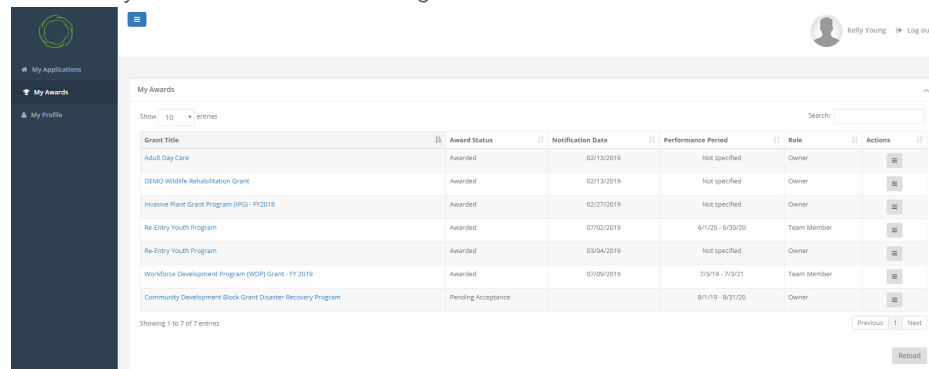# 4. Submitting Reports to your Grantor

4.1 Submitting Financial Reports
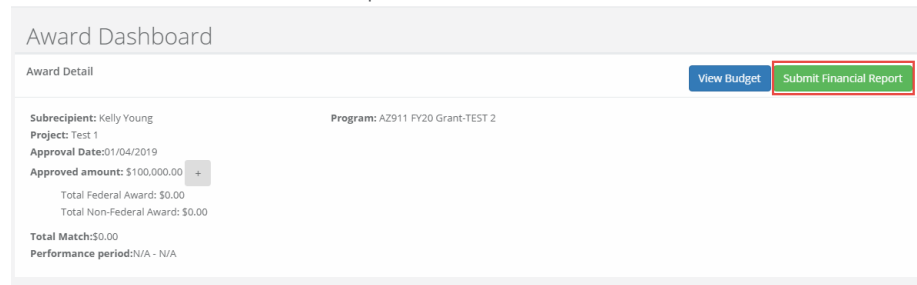
From the Award Dashboard, you can submit a Financial Report directly to the Program Officer.

1) Select "My Awards" from the navigation bar:

2) Click on "Submit Financial Report":
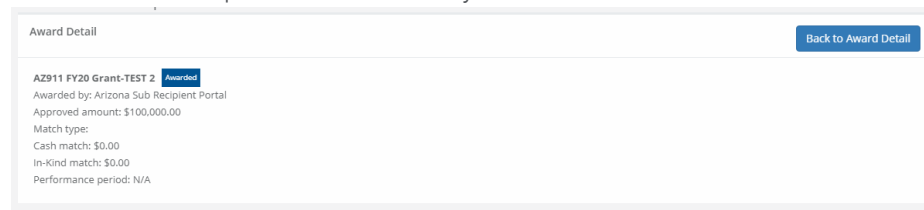
3) The Award Detail provides a summary of the award information:

The Award Financial Overview is not editable, but will update itself depending on the amounts that are submitted in the Financial Report Details. This area is a summary of the total award spent and the total award amount remaining:

Award Financial Overview						^

This overview will update in real time as you complete your financial request. The data here reflects all submitted spending reports, even those still in the approval process.

	Spend		Match		Spend + Match
Award Total Spend	$ 0.00		$ 0.00		$ 0.00
	0.00	%	0.00	%	
Award Remaining	$ 100,000.00		$ 0.00		$ 100,000.00

4) In the Financial Report Details, click inside the Reporting Period text box and provide the dates of the reporting period then click "Apply":

Financial Report Details

Reporting Period: *

07/01/2019 - 08/24/2019

📅 07/01/2019   📅 08/24/2019   Apply   Cancel

<			Jul 2019							Aug 2019			>
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6	28	29	30	31	1	2	3
7	8	9	10	11	12	13	4	5	6	7	8	9	10
14	15	16	17	18	19	20	11	12	13	14	15	16	17
21	22	23	24	25	26	27	18	19	20	21	22	23	24
28	29	30	31	1	2	3	25	26	27	28	29	30	31
4	5	6	7	8	9	10	1	2	3	4	5	6	7

5) Enter the amounts in the appropriate category under the Spend and Match columns. Spend is the amount of grant funds spent.

Match is the amount of match funds spent. Applicants can only report in categories they are awarded in:

NOTE: If a category is grayed out, and you would like to request reimbursement in that category, a budget modification is needed.

6) The "Spend + Match" and "Award Remaining" columns will automatically calculate the costs when you update the Spend and Match amounts. Additionally, the Report Totals will automatically calculate to provide a breakdown of the amounts and percentages of funds used in the Reporting period:

7) Once complete, check *Reimbursement Requests*. The box will auto populate with the amount from the spend column. If different, define the amount you are requesting for reimbursement:

Category	Spend	Match	Spend + Match	Award Remaining
1. Personnel	$ 0.00	$ 0.00	$ 0.00	$ 0.00
2. Fringe Benefits	$ 0.00	$ 0.00	$ 0.00	$ 0.00
3. Travel	$ 0.00	$ 0.00	$ 0.00	$ 0.00
4. Equipment	$ 0.00	$ 0.00	$ 0.00	$ 0.00
5. Supplies	$ 0.00	$ 0.00	$ 0.00	$ 0.00
6. Contractual	$ 50,000.00	$ 0.00	$ 50,000.00	$ 225,000.00
7. Construction	$ 0.00	$ 0.00	$ 0.00	$ 0.00
8. Other	$ 5,000.00	$ 0.00	$ 5,000.00	$ 5,000.00

Program Income	Received	Expended
	$ 0.00	$ 0.00

Report Total	Spend	Match	Spend + Match
	$ 55,000.00	$ 0.00	$ 55,000.00
	100.00 %	0.00 %	

☑ **Reimbursement Request***
$ 55,000.00

☐ **This is my final report**

8) When this is the final report and the final request for reimbursement, check the "This is my final report" box. The grant closeout process will automatically begin once this box is checked and submitted.
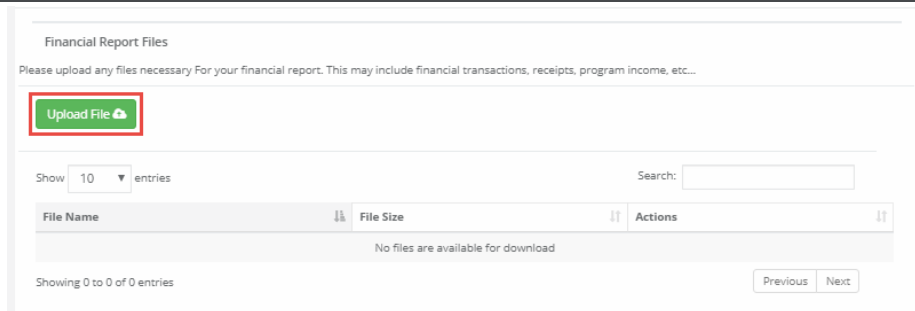
Include any spending details and a brief description about the reporting period's expense in the Financial Report Narrative:

Financial Report Narrative *

Please develop your narrative below including key metrics, spending details, and other pertinent details.

| </> | H1 | H2 | H3 | **B** | *I* | U̲ | ☰ | ☰ | ☰ | ☰ | % |

9) You can also upload any documents, including PDFs and scanned images, to the Financial Report. Click on "Upload File" to attach a document:

10) When you are finished, click "Submit Report":

11) Click on the warning page to send the report to the funding agency:

Warning!

Are you sure you want to submit your financial report? This will send the contents of this form to the grantor for approval.

Cancel   OK

12) You will be taken back to the Award Detail page, where the Financial Report will now be recorded under the Financial Activities:

13) The Financial Report status will change, depending on the approver's actions:

- **Pending Approval**: The Financial Report has not been reviewed.

- **Approved/Awaiting Payment**: The Financial Report has been reviewed and is waiting for payment.

- **Approved/Paid**: The reimbursement is complete.

14) If this report fulfills an assigned *Financial Report* task in your *Pending Tasks* table, click on the Actions icon next to that task and click "Mark Task Complete":

4.2. Submitting Activity Reports

1) From "My Awards," select the Grant Title of the award:

2) At the top right, click "Submit Activity Report":

3) Complete the following form and attach any pertinent files:

4) Update any Goal/Activity Metrics

5) Attach any Activity Report Files by clicking the green *Upload File* button

Activity Report Files

Please upload any files necessary for your activity report.

Upload File ☁

Show 10 ▾ entries

File Name	⇅	File Size	⇅	Actions
		No files are available for download		

6) Click "Submit Report":

Previous Next

Submit Report Cancel

7) If this report fulfills an assigned Activity Report task in your *Pending Tasks* table, click on the Actions icon next to that task and click "Mark Task Complete":

Task Type	⇅	Due Date	⇅	Actions
Activity Report Request		09/30/2020		☰
Activity Report Request		12/31/2020		

Create Activity Report
Mark Task Complete

Showing 1 to 2 of 2 entries