



# 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- *Withdrawn*: Grant Recipient has withdrawn the report for edits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.

<b>Workflow Status</b>	<b>Possible Grant Recipient Actions</b>
<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)
<b><i>Withdrawn</i></b>	Edit Report, Print, Download (PDF)
<b><i>No Data Available</i></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

## Login

To log into GrantSolutions and access PPRs, perform 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.

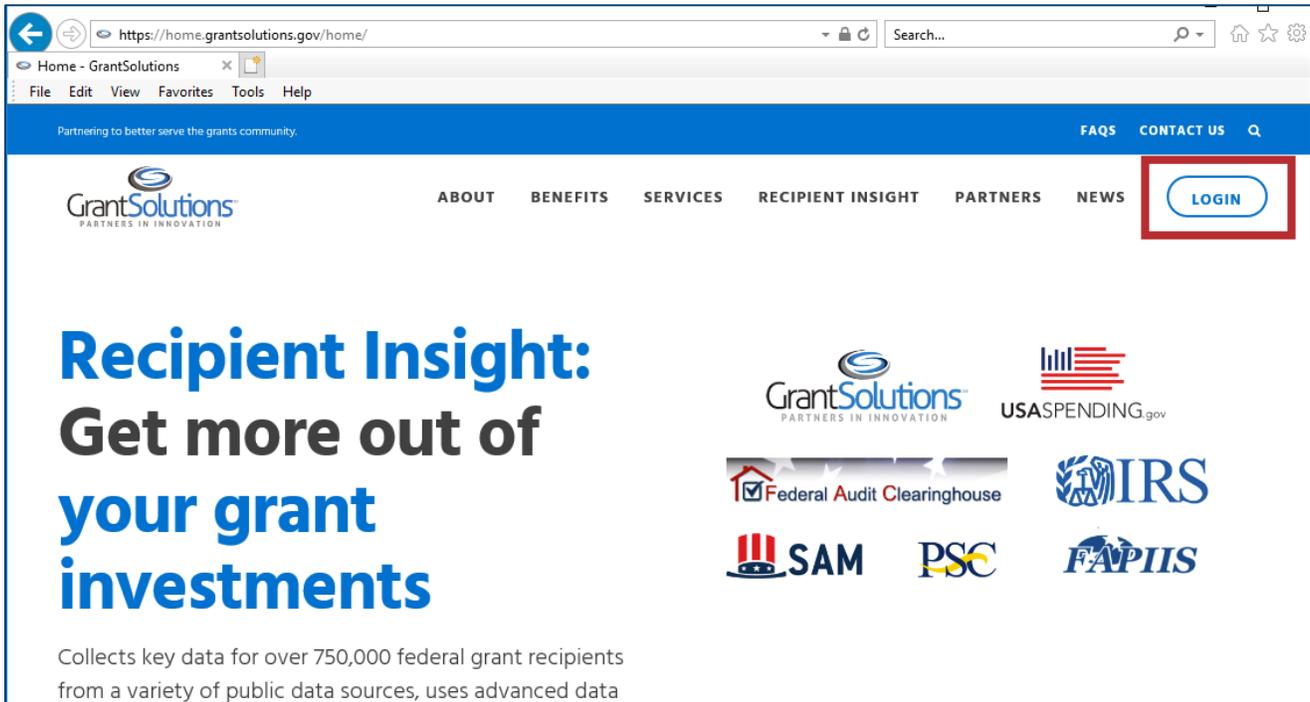
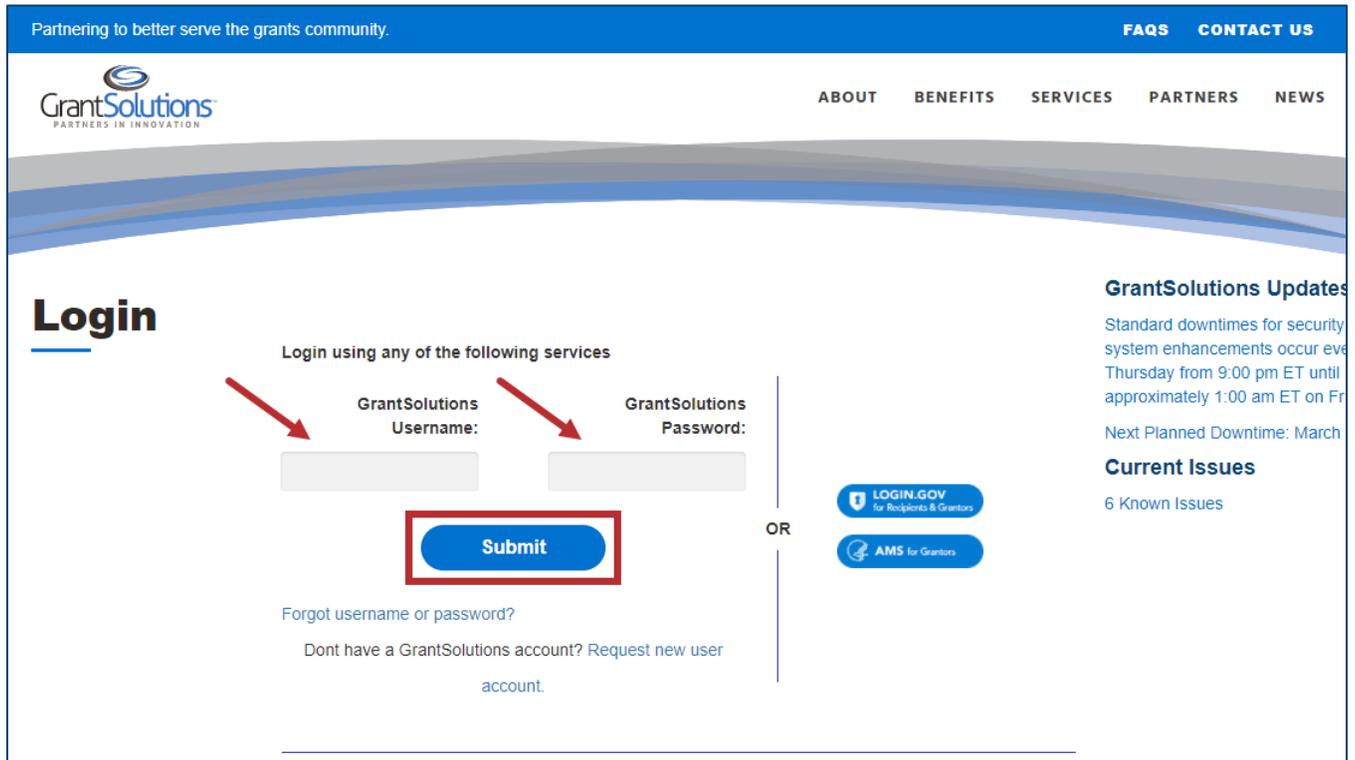


Figure 1: GrantSolutions Home screen with Login button

2. The “GrantSolutions Login” screen appears. Enter your **username** and **password** and click the **Submit** button.

**Note:** Alternatively, log in with your PIV card or Login.gov account if applicable.



The screenshot shows the GrantSolutions website's login page. At the top, there is a blue navigation bar with the text "Partnering to better serve the grants community." and links for "FAQS" and "CONTACT US". Below this is a secondary navigation bar with the GrantSolutions logo and links for "ABOUT", "BENEFITS", "SERVICES", "PARTNERS", and "NEWS". The main content area features a "Login" heading. Underneath, it says "Login using any of the following services". There are two input fields: "GrantSolutions Username:" and "GrantSolutions Password:". A blue "Submit" button is positioned below these fields. To the right of the input fields, there is a vertical line with "OR" written next to it, followed by two buttons: "LOGIN.GOV for Recipients & Grantees" and "AMS for Grantees". Below the input fields, there are links for "Forgot username or password?" and "Dont have a GrantSolutions account? Request new user account.". On the right side of the page, there is a "GrantSolutions Updates" section with text about system downtime and a "Current Issues" section with "6 Known Issues".

Figure 2: GrantSolutions Login screen with GrantSolutions Username and GrantSolutions Passwords fields and Submit button

3. The “My Grants List” screen appears.

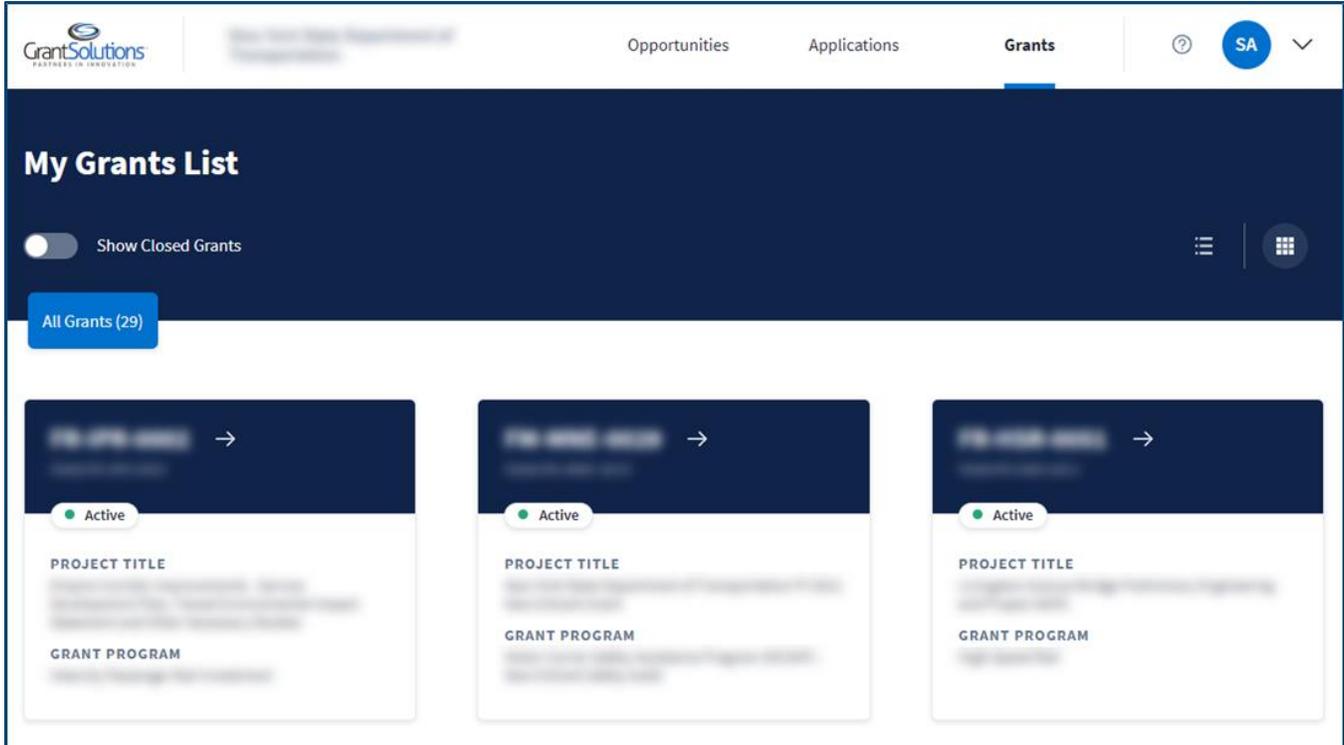


Figure 3: My Grants List screen

## 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*.

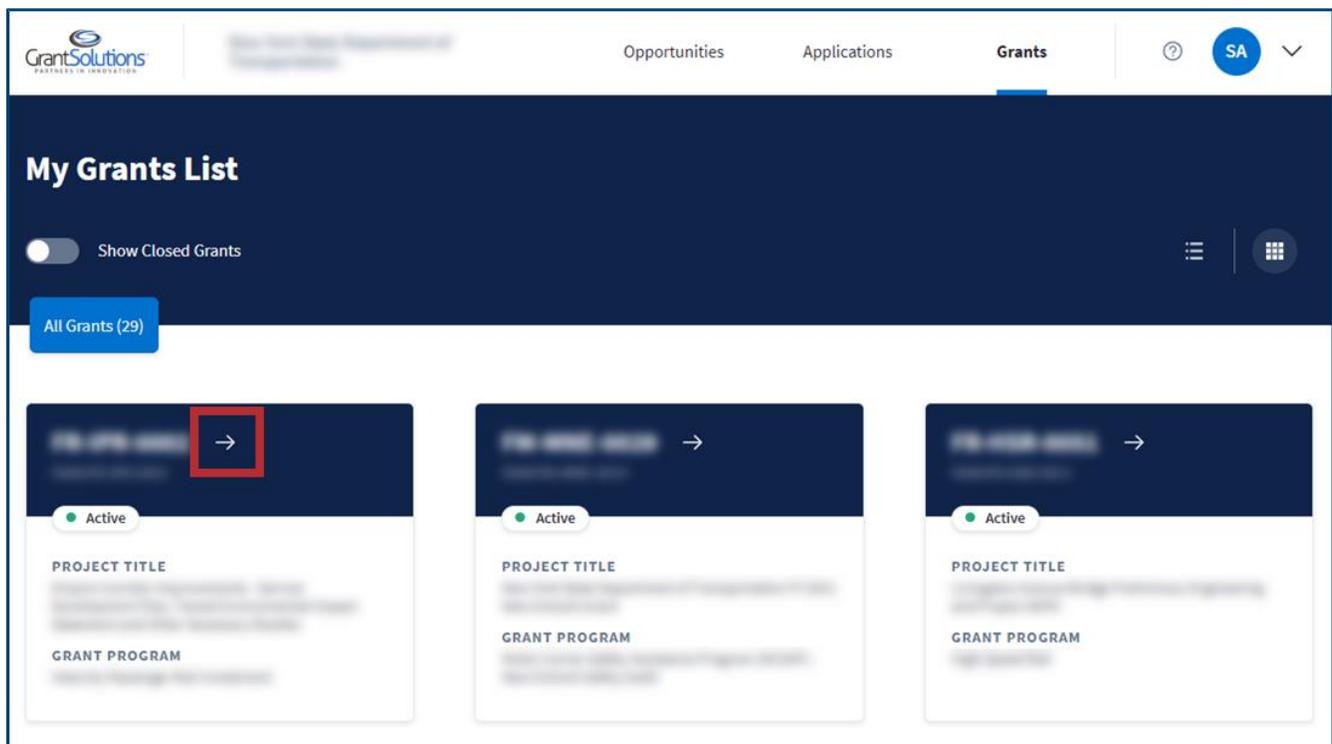


Figure 4: My Grants List screen with arrow button

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

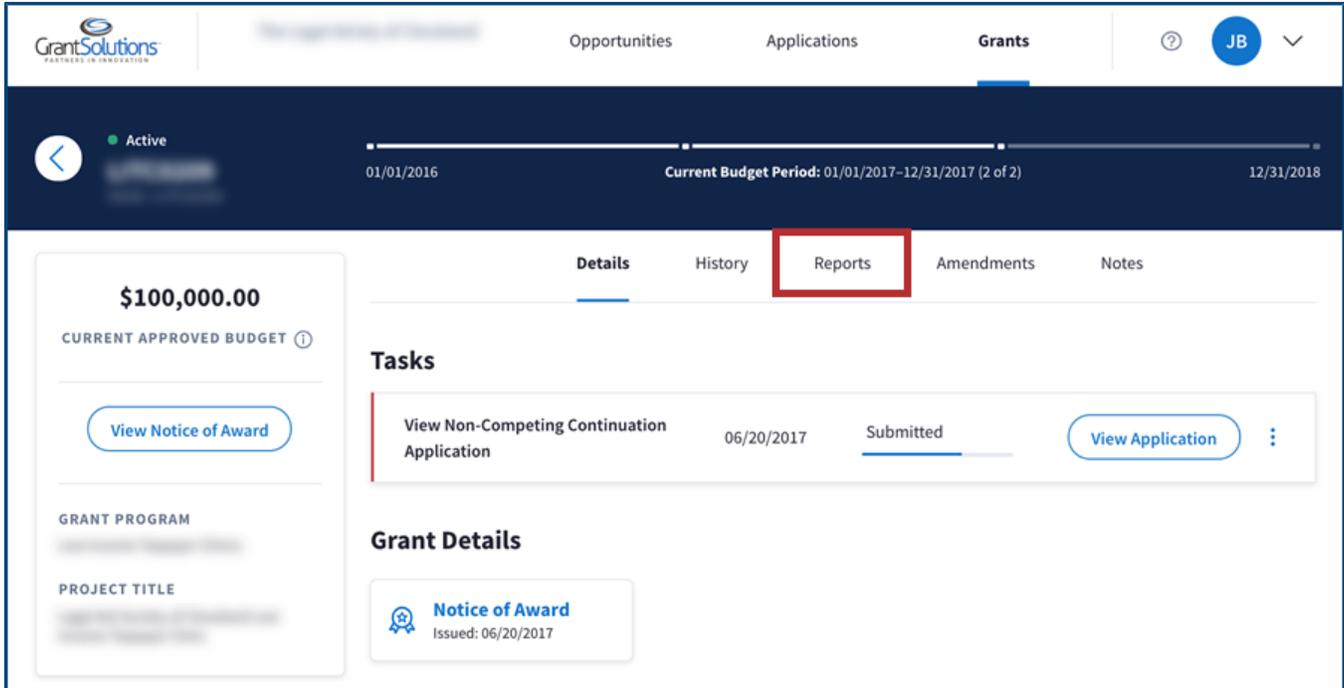
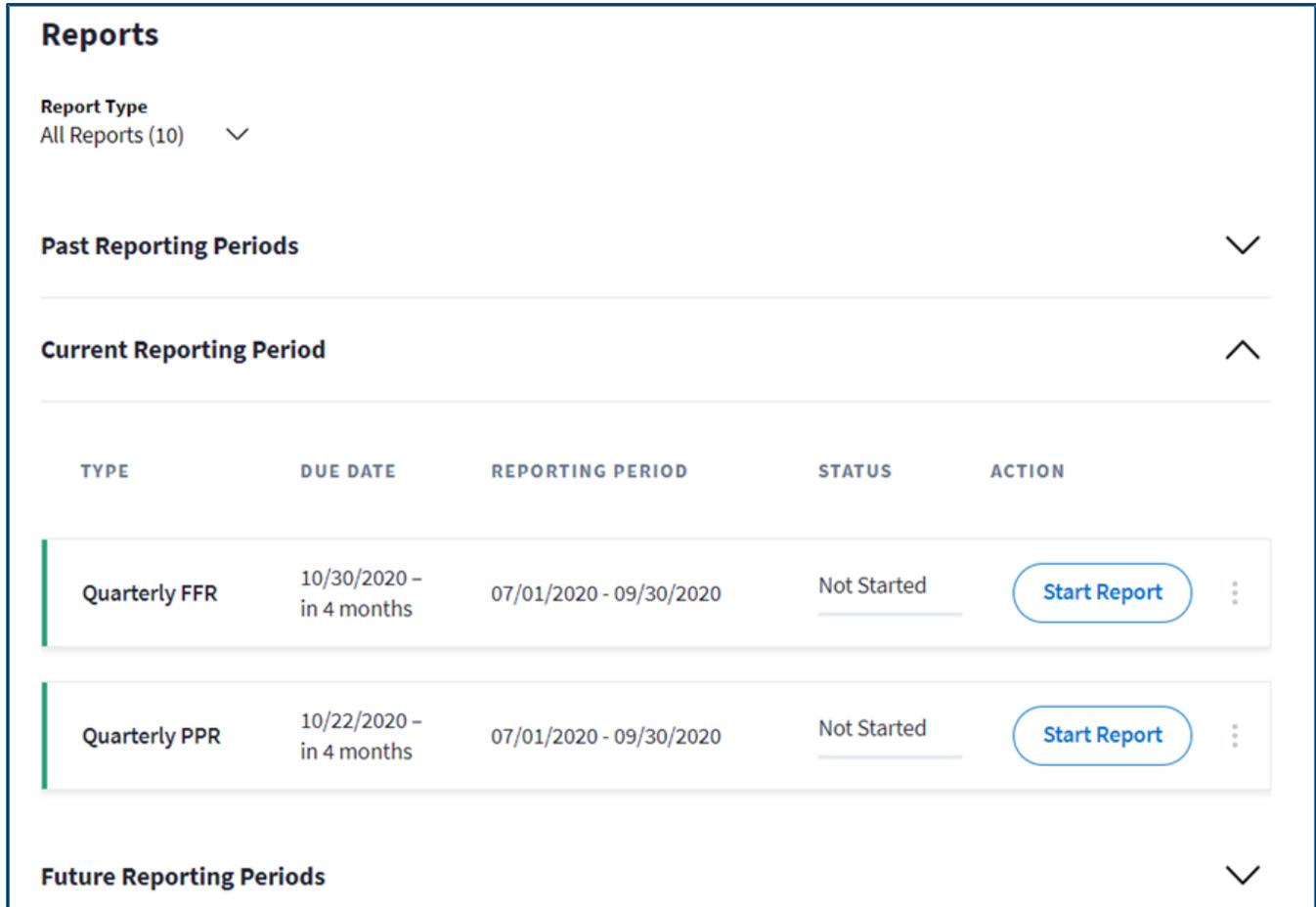


Figure 5: Grant Details screen with Reports tab

The *Reports* tab opens.



**Reports**

Report Type  
All Reports (10) ▾

Past Reporting Periods ▾

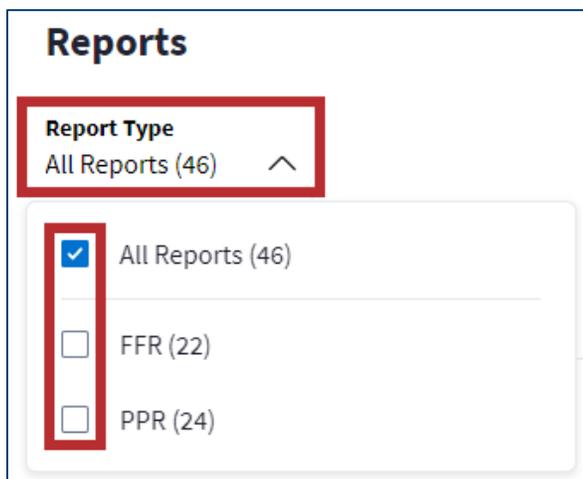
Current Reporting Period ▲

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

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



**Reports**

Report Type  
All Reports (46) ▲

- All Reports (46)
- FFR (22)
- PPR (24)

Figure 7: 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 8: 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 **User Avatar** drop-down to the right of the user initials.

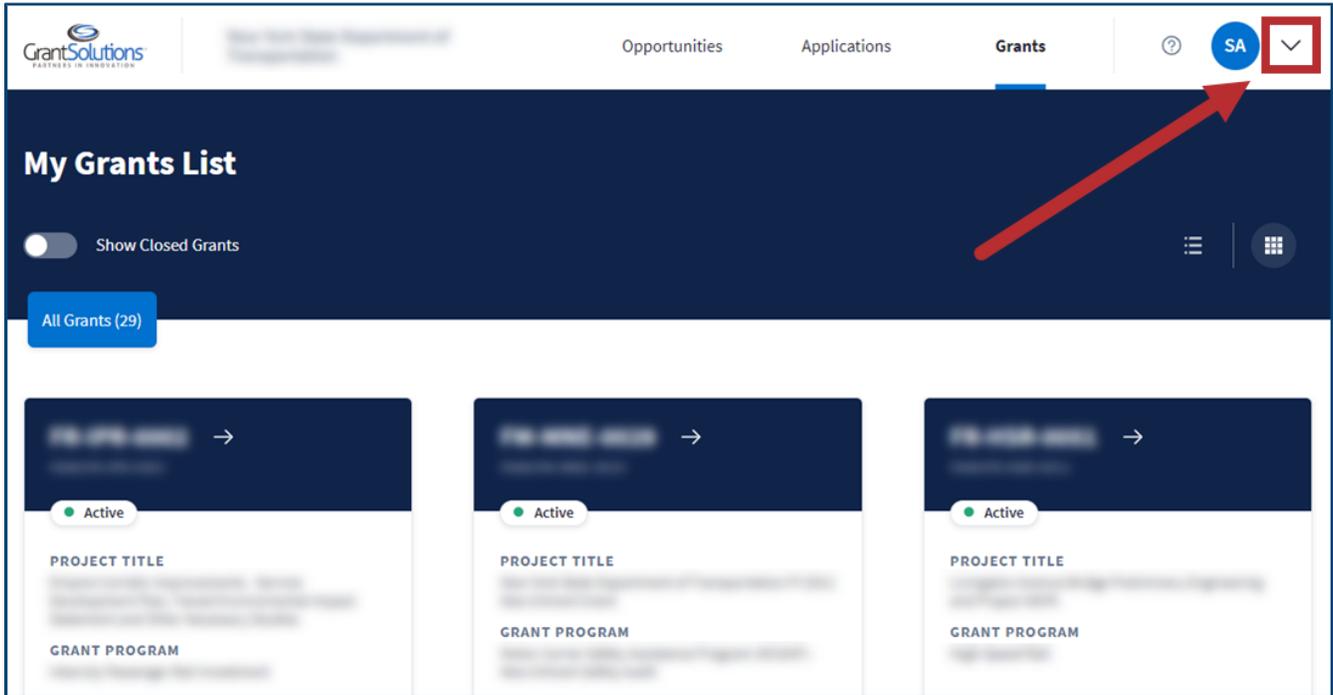


Figure 9: My Grants List screen with User Avatar drop-down

2. In the *User Avatar* drop-down, click the **Switch Back to Classic** button at the bottom.

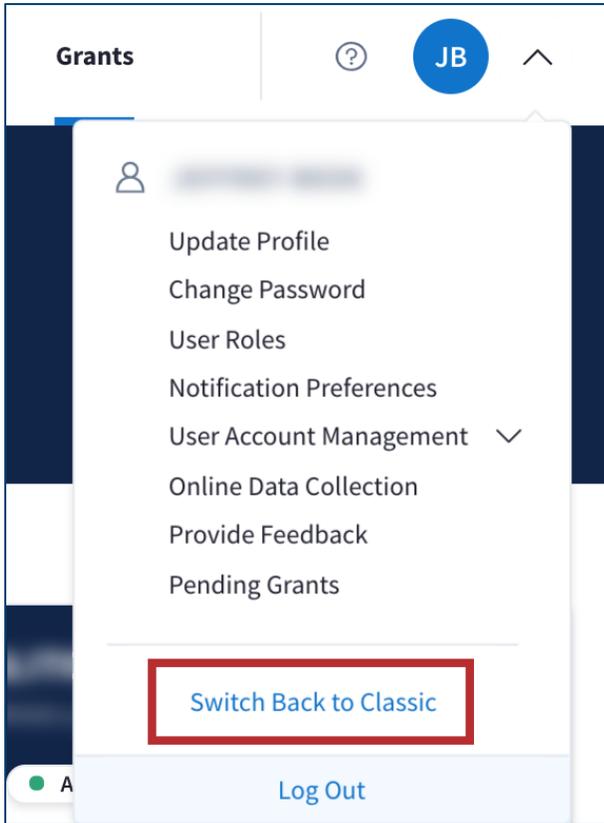


Figure 10: User Avatar drop-down with Switch Back to Classic button

3. Click the **Start Survey** button to complete the optional Feedback Survey, or click the **No Thanks** button to skip it.

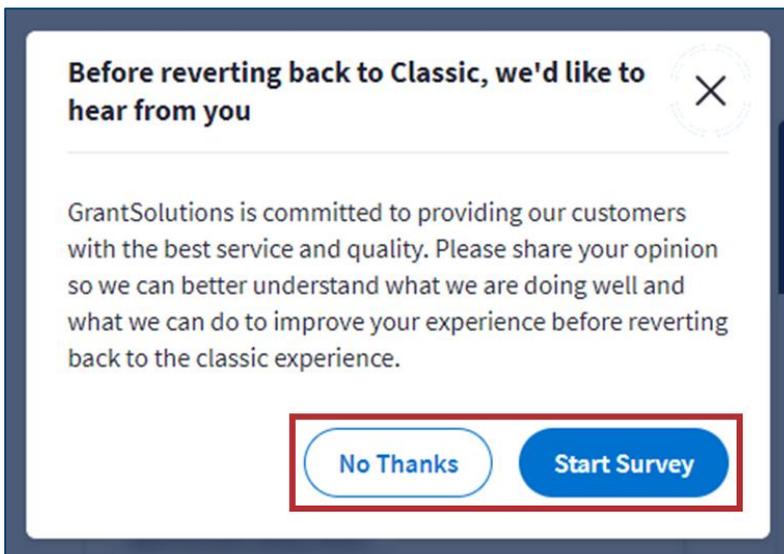
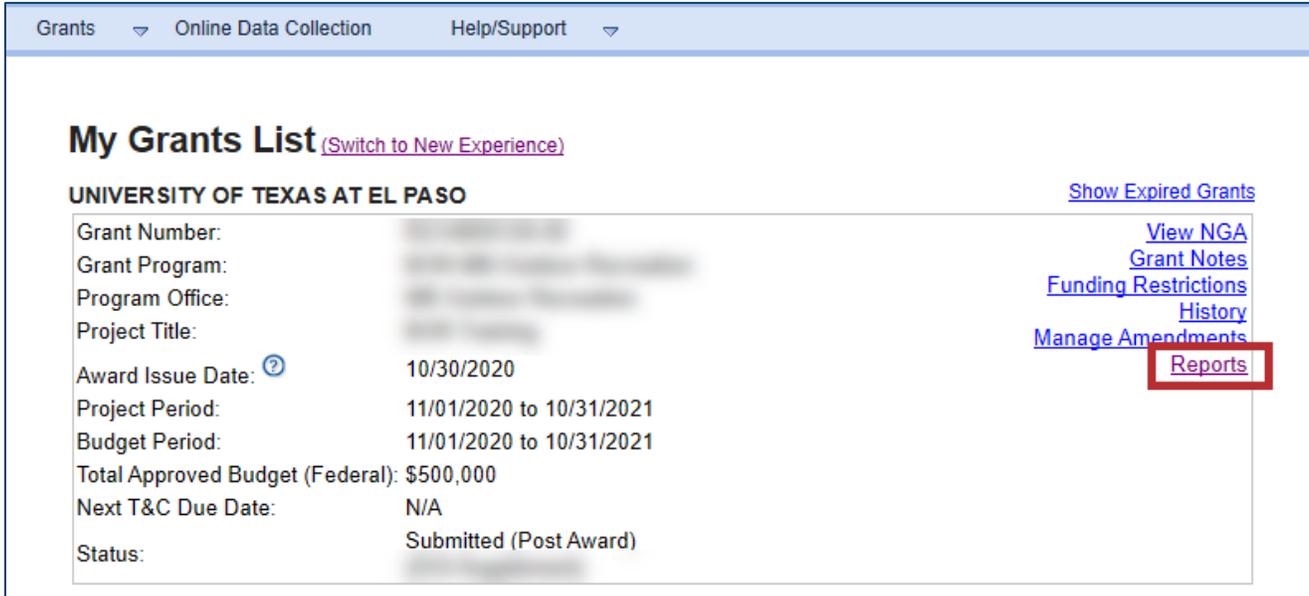


Figure 11: Switch Back to Classic message with Start Survey and No Thanks buttons

4. 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.



Grants ▾ Online Data Collection Help/Support ▾

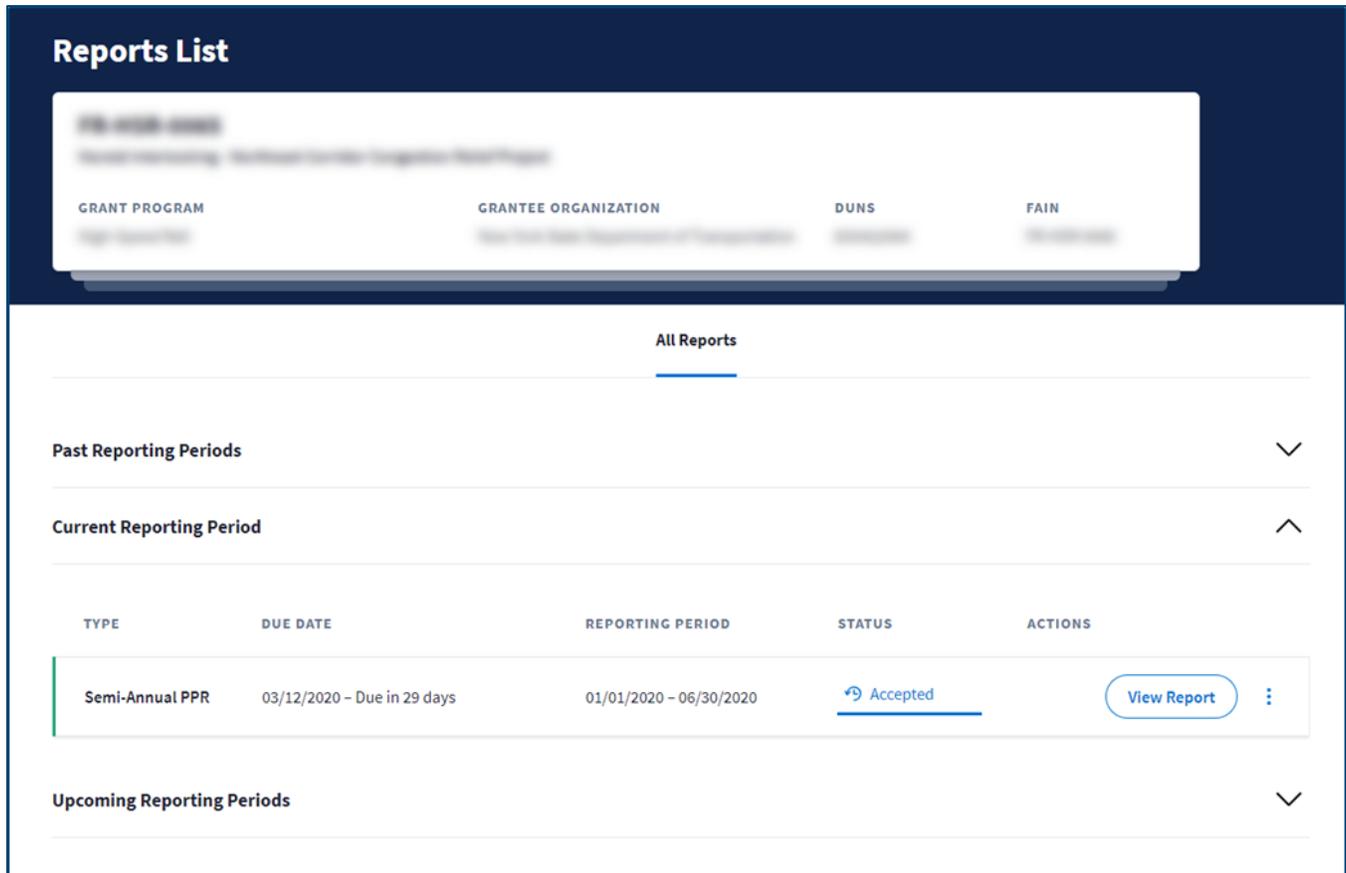
## My Grants List [\(Switch to New Experience\)](#)

**UNIVERSITY OF TEXAS AT EL PASO** [Show Expired Grants](#)

Grant Number:		<a href="#">View NGA</a>
Grant Program:		<a href="#">Grant Notes</a>
Program Office:		<a href="#">Funding Restrictions</a>
Project Title:		<a href="#">History</a>
Award Issue Date: <sup>?</sup>	10/30/2020	<a href="#">Manage Amendments</a>
Project Period:	11/01/2020 to 10/31/2021	<b>Reports</b>
Budget Period:	11/01/2020 to 10/31/2021	
Total Approved Budget (Federal):	\$500,000	
Next T&C Due Date:	N/A	
Status:	Submitted (Post Award)	

Figure 12: My Grants List screen in Classic Experience with Reports link

The “Reports List” screen appears.



**Reports List**

GRANT PROGRAM      GRANTEE ORGANIZATION      DUNS      FAIN

**All Reports**

Past Reporting Periods

Current Reporting Period

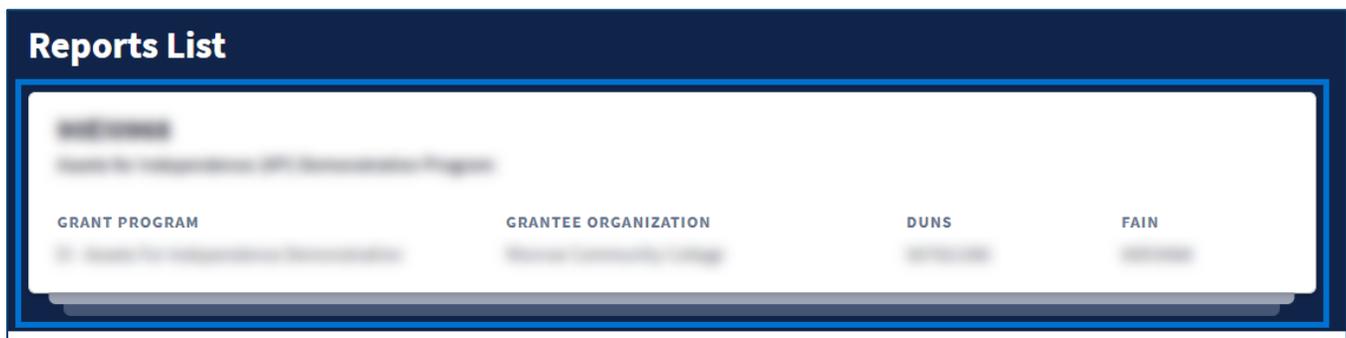
TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Semi-Annual PPR	03/12/2020 - Due in 29 days	01/01/2020 - 06/30/2020	Accepted	View Report

Upcoming Reporting Periods

Figure 13: 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*, *DUNS*, and *FAIN*.



**Reports List**

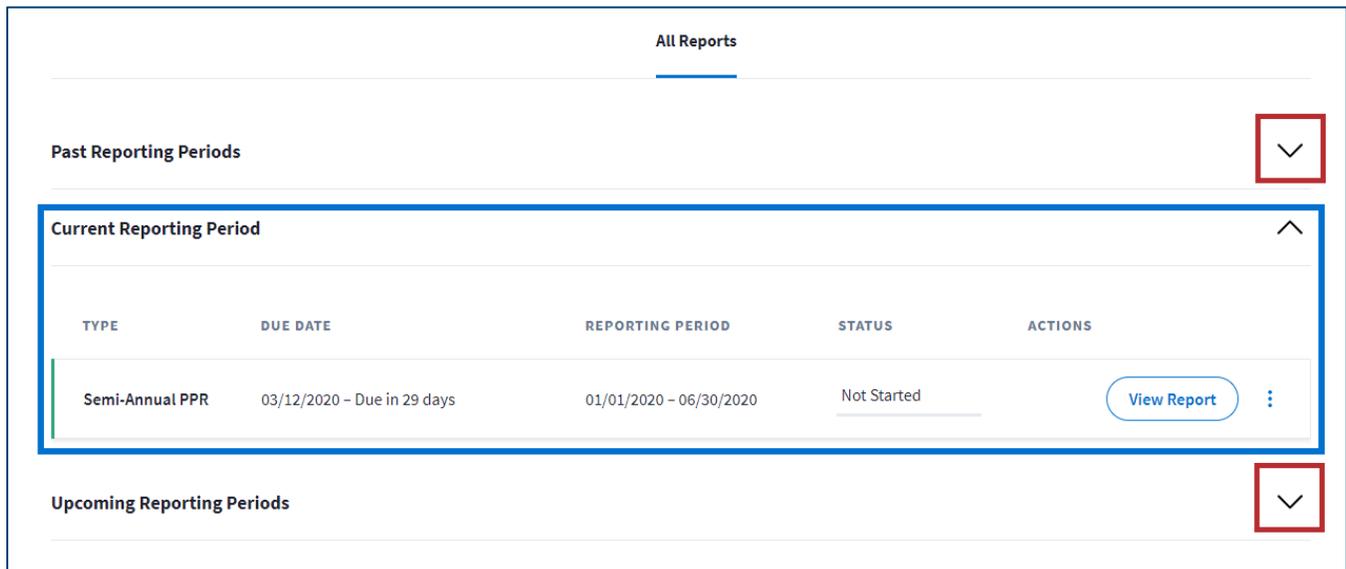
GRANT PROGRAM      GRANTEE ORGANIZATION      DUNS      FAIN

Figure 14: Reports List screen with Project Information

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 ∨

---

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	View Report <span style="font-size: 0.8em;">⋮</span>

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Upcoming Reporting Periods ∨

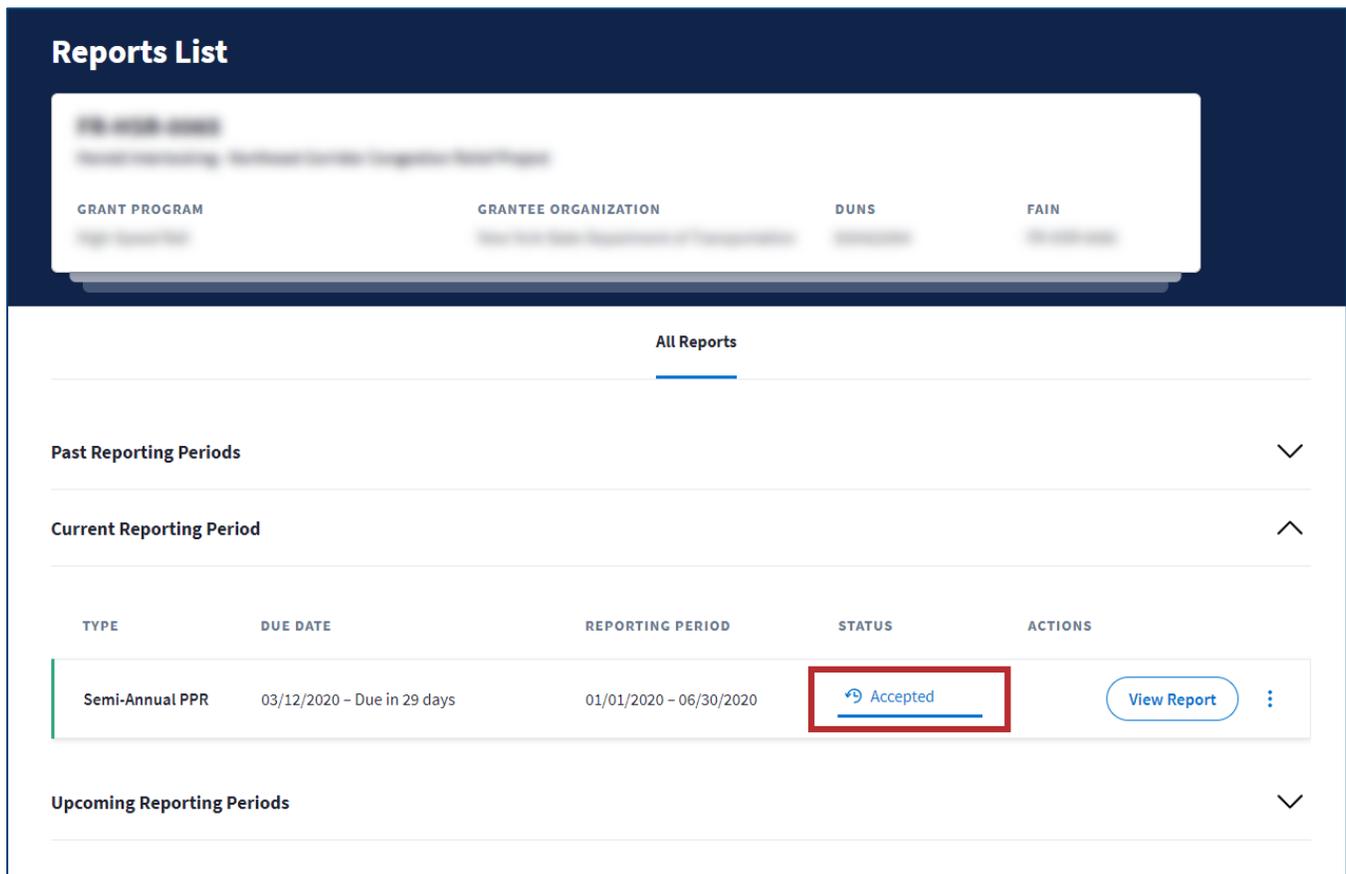
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Figure 15: Reports List screen with Reporting Periods and up and down arrows

## 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 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, Accepted, etc.) to view the workflow history and any comments on the “PPR Reporting Workflow History” screen.



**Reports List**

SEARCH

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 16: Reports List screen with Status button

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

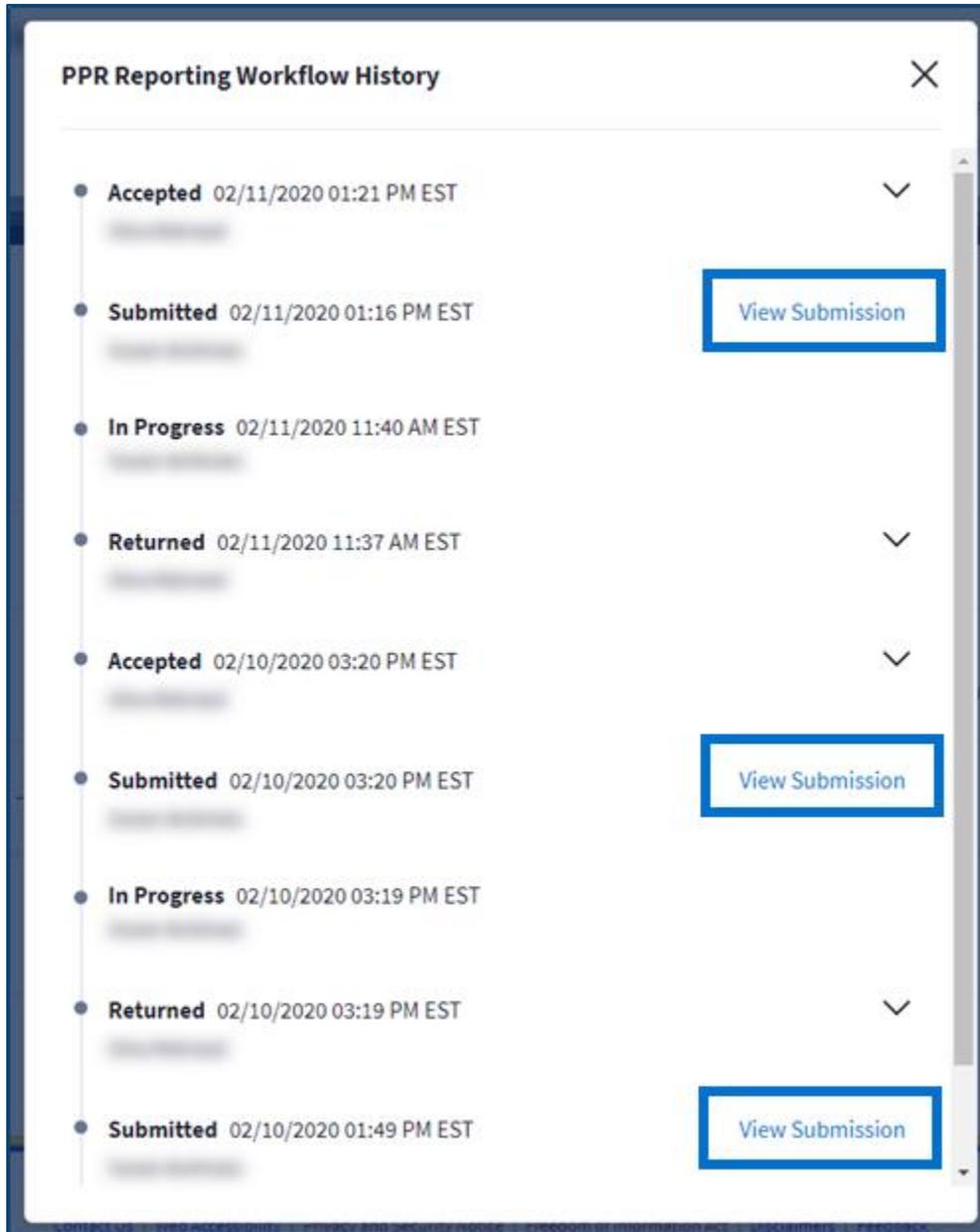


Figure 17: PPR Reporting Workflow History window with View Submission buttons

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

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

Current Reporting Period <span style="float: right;">^</span>				
TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Semi-Annual PPR	03/12/2020 – Due in 29 days	01/01/2020 – 06/30/2020	<a href="#">Accepted</a>	<a href="#">View Report</a> <span style="border: 1px solid blue; border-radius: 50%; padding: 2px;">⋮</span>

Figure 18: 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**                      **GRANTEE ORGANIZATION**                      **DUNS**                      **FAIN**

All Reports

Past Reporting Periods v

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	<a href="#">Accepted</a>	<a href="#">View Report</a> <span style="border: 2px solid red; padding: 2px;">⋮</span> <div style="border: 2px solid red; padding: 5px; margin-top: 5px;"> <p>Print</p> <p>Download <span style="float: right;">✓</span></p> </div>

Upcoming Reporting Periods

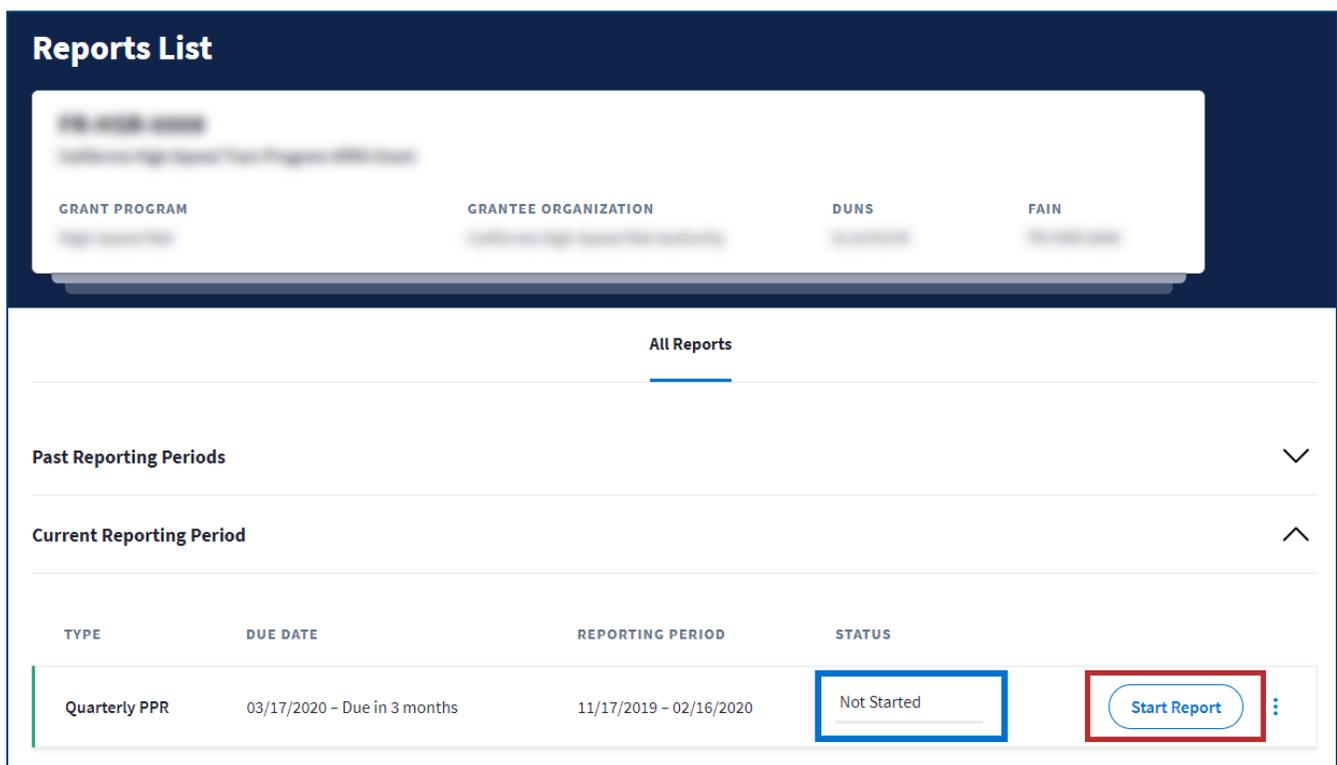
Figure 19: Reports List screen with Actions List icon drop-down

## 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.



**Reports List**

SEARCH

GRANT PROGRAM	GRANTEE ORGANIZATION	DUNS	FAIN

All Reports

Past Reporting Periods ∨

Current Reporting Period ∧

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 <span>⋮</span>

Figure 20: Reports List 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, the PPR automatically saves as Grant Recipients enter data.

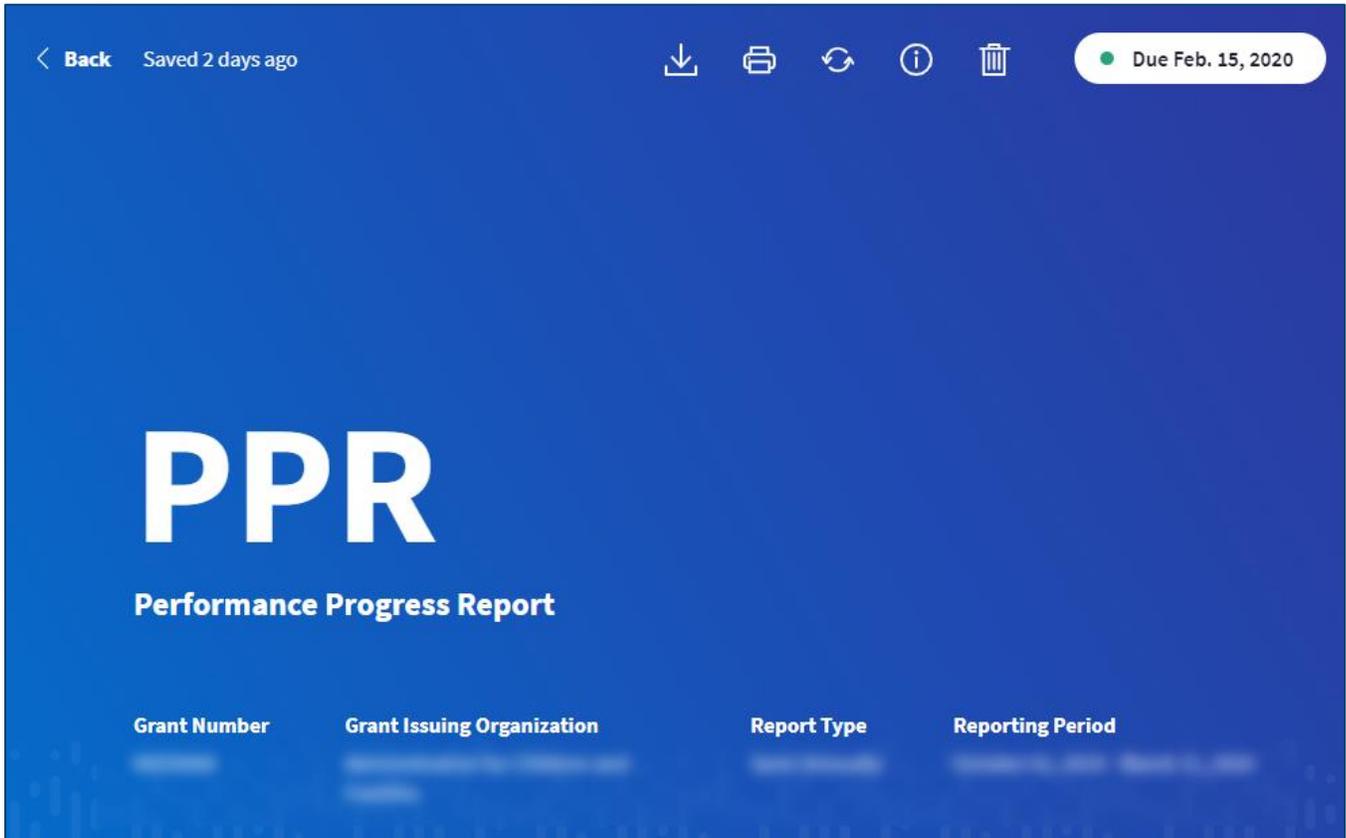


Figure 22: Performance Progress Report screen

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. 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:**
  - i.  Download a zip file with the PDF version of the PPR and any attachments.
  - ii.  Print a 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.

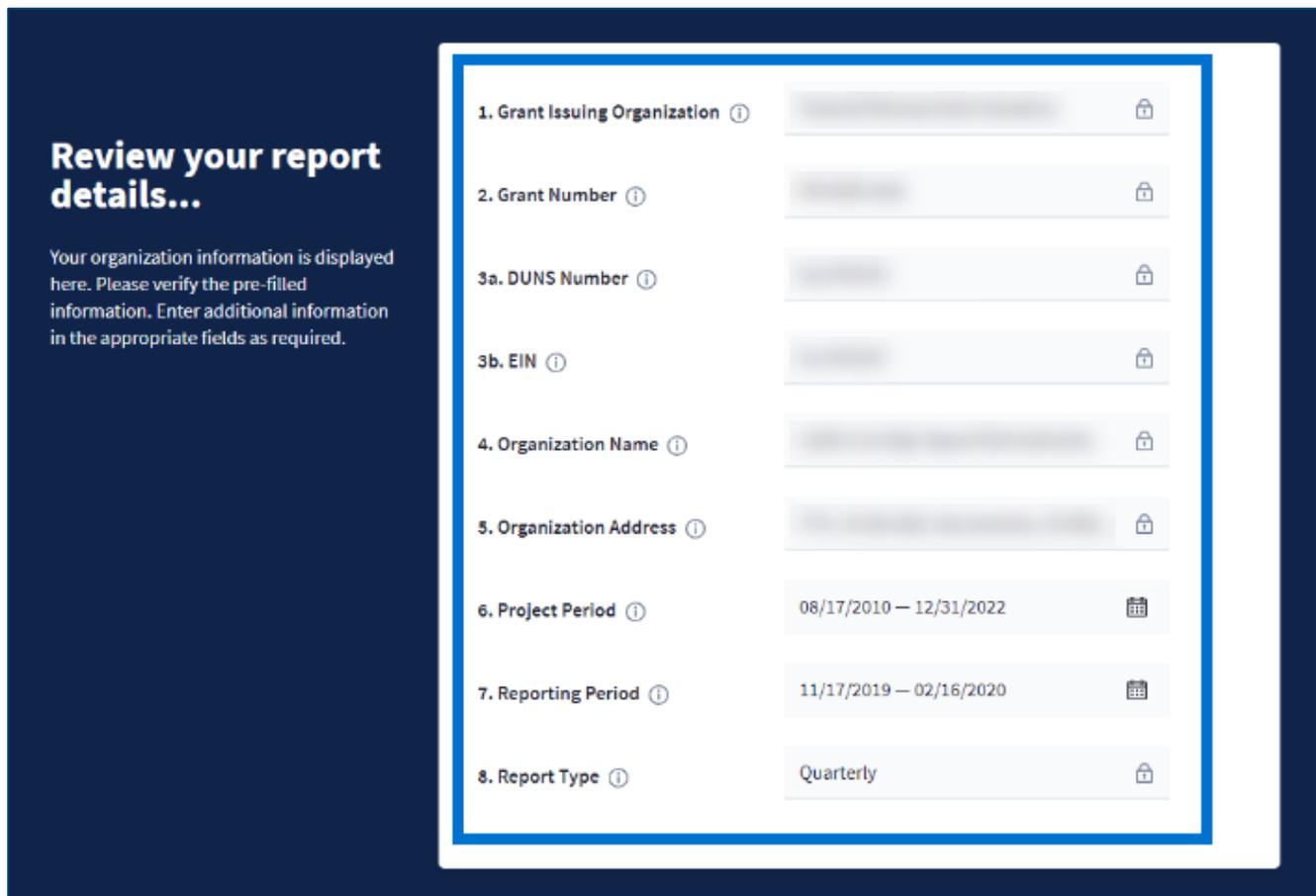


Figure 23: PPR header line with *In Progress* Delete button included

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

Figure 24: 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, social security number, nor any other information that could be used to distinguish a person's identity

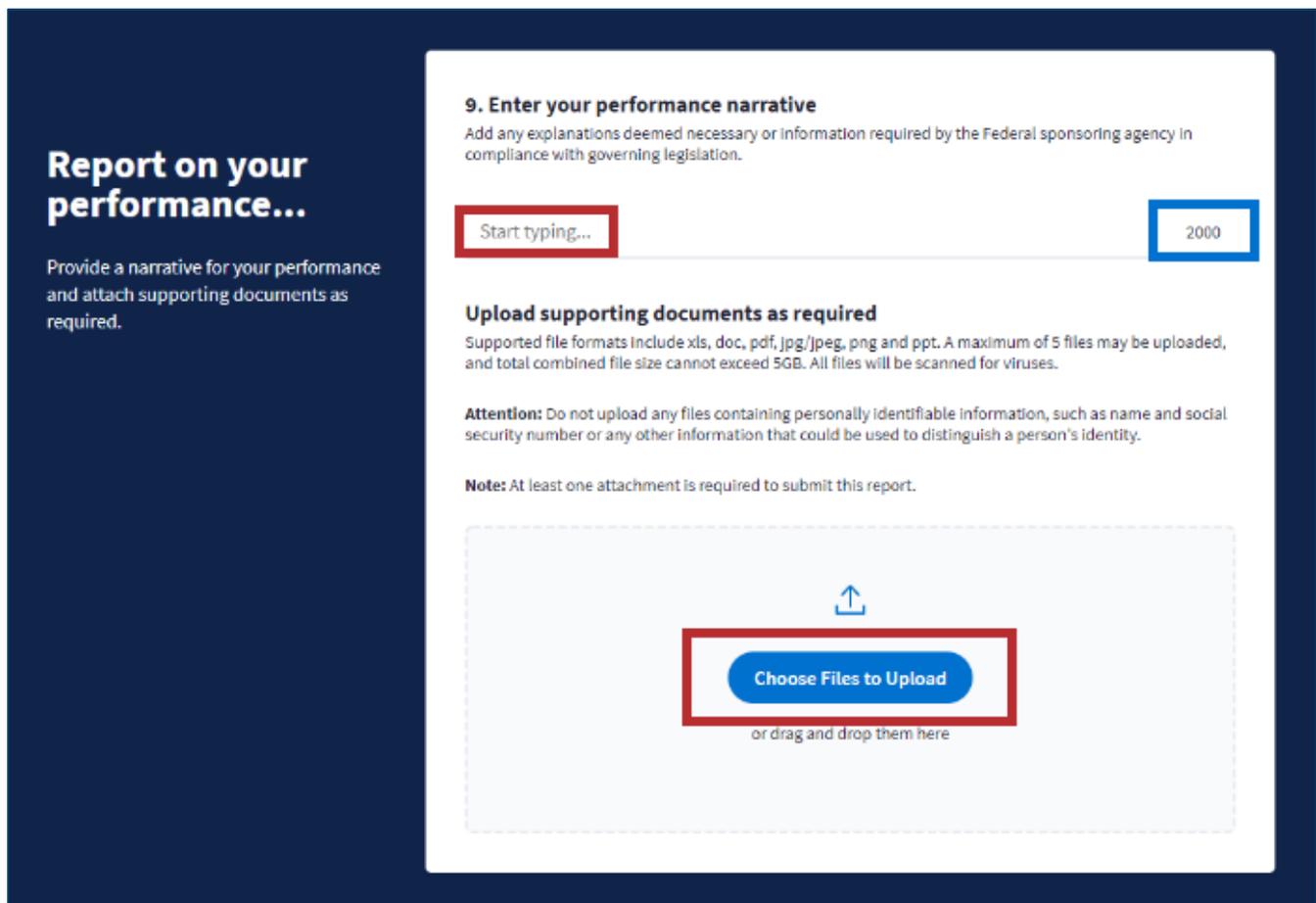


Figure 25: Performance Progress Report screen with Start typing field and Choose Files to Upload button

5. 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.

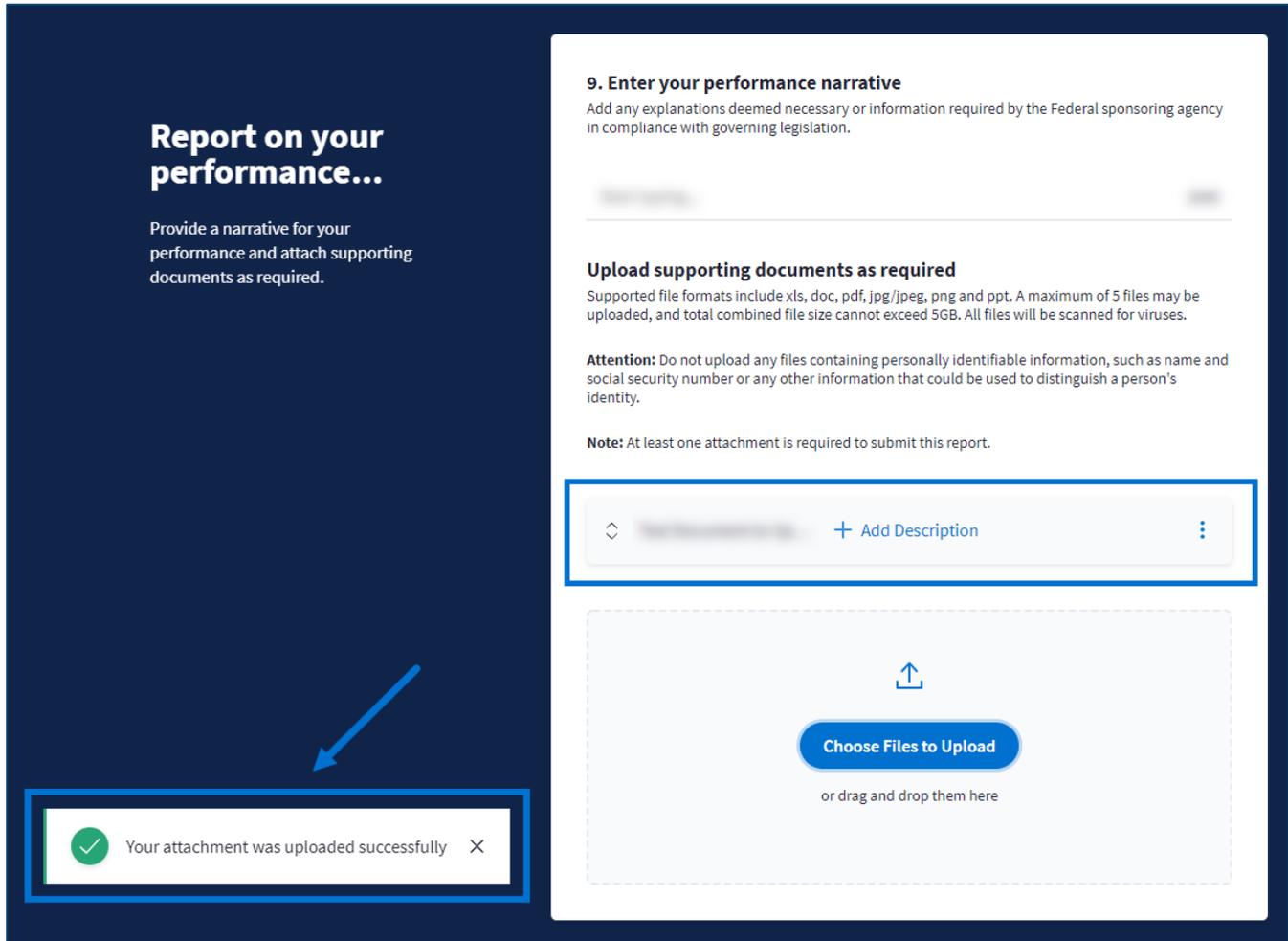
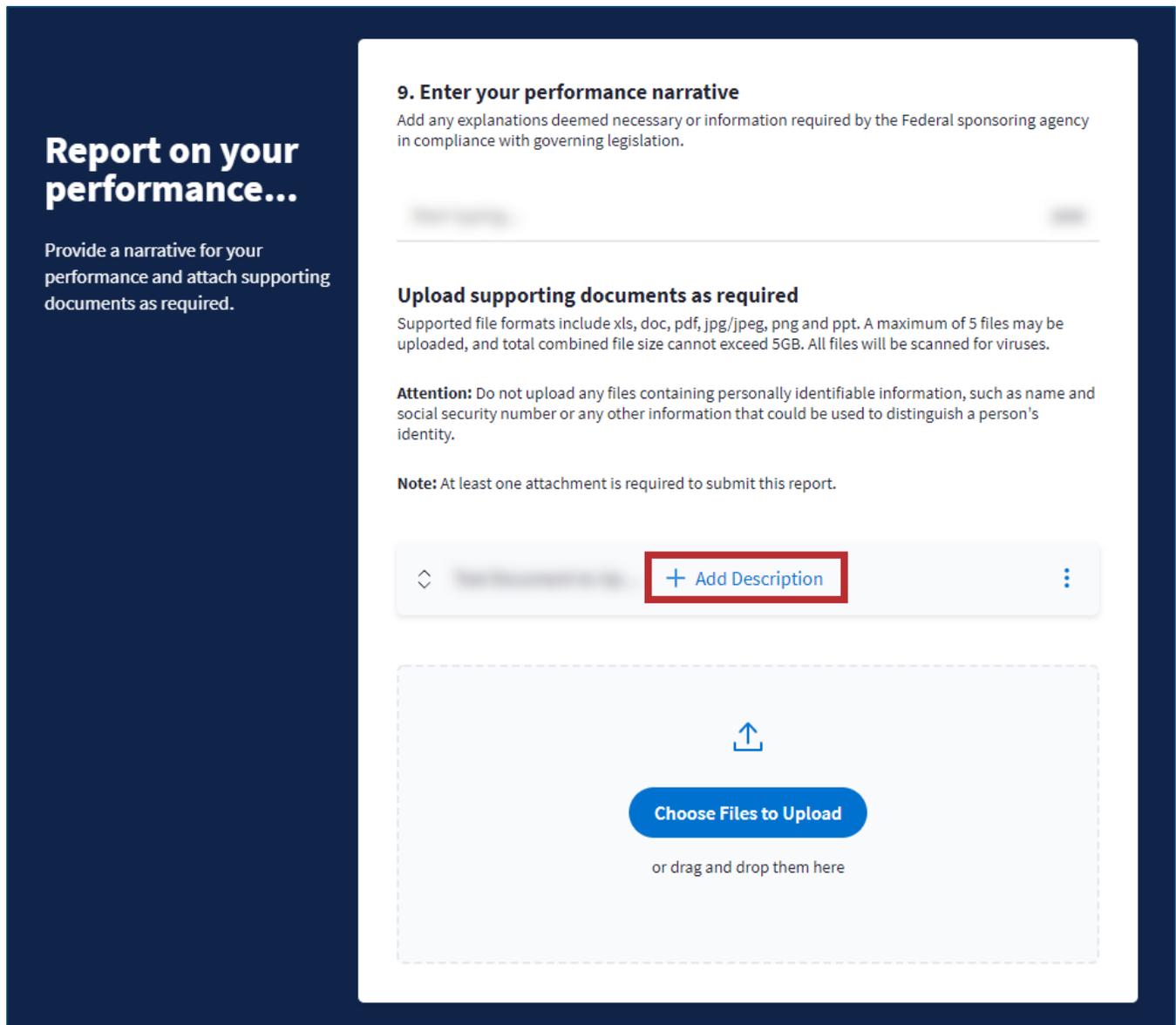


Figure 26: Performance Progress Report screen with attachment and Your attachment was uploaded successfully message

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 27: Performance Progress Report screen with Add Description button

7. 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.

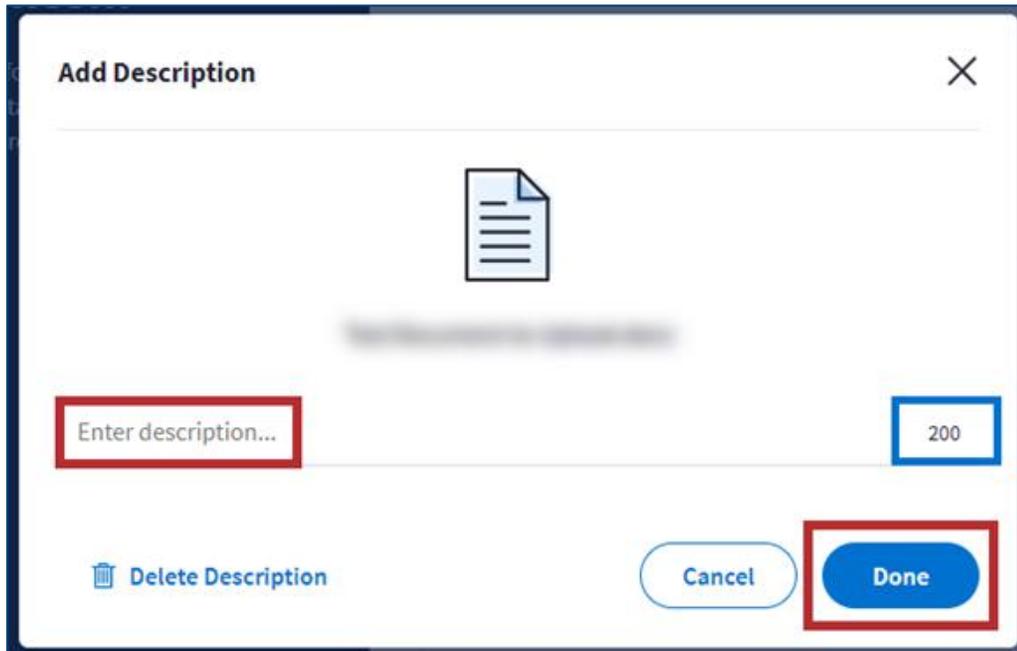


Figure 28: Add Description window with Enter description field and Done button

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.

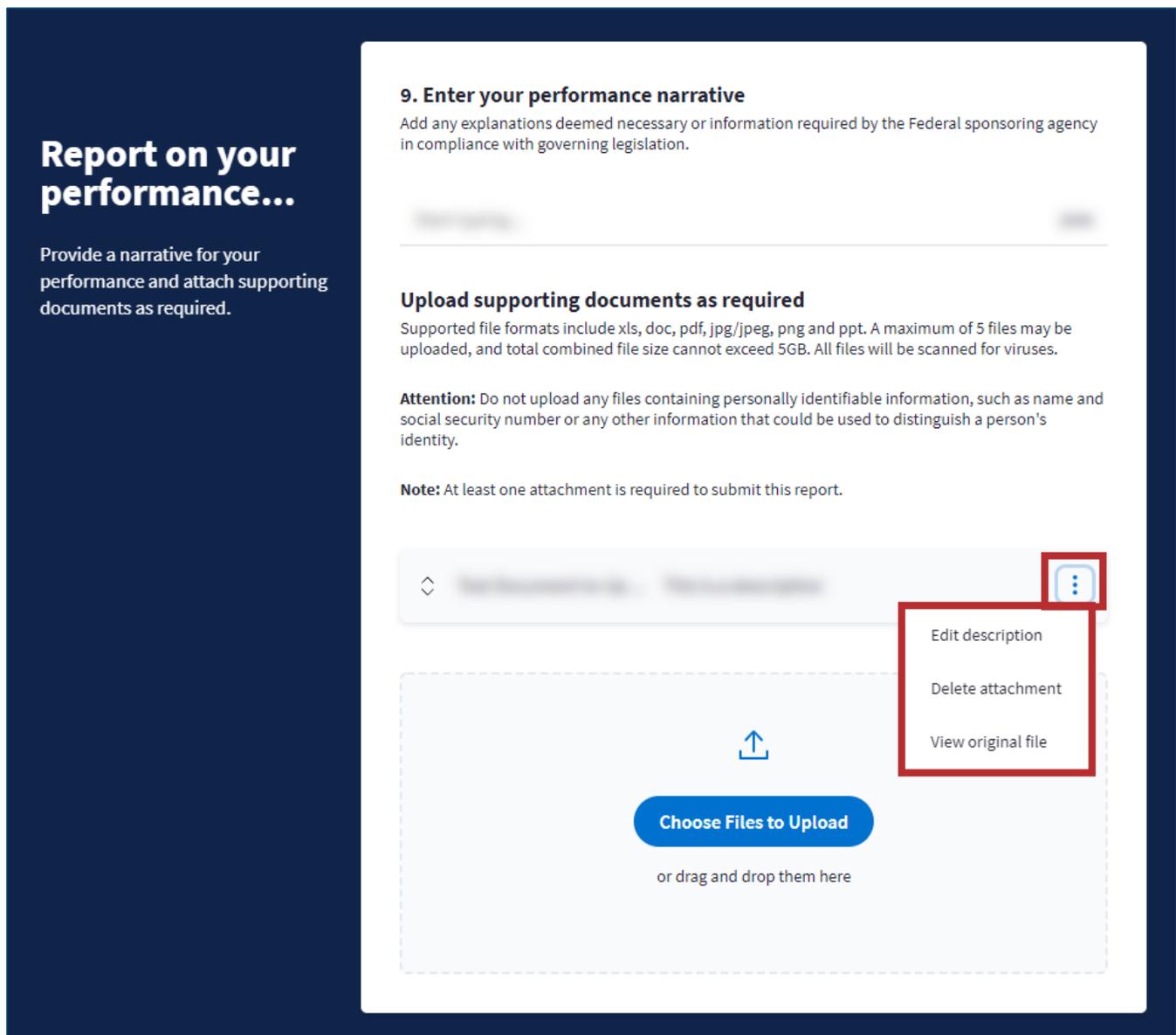


Figure 29: Performance Progress Report screen with attachments Actions List icon drop-down

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

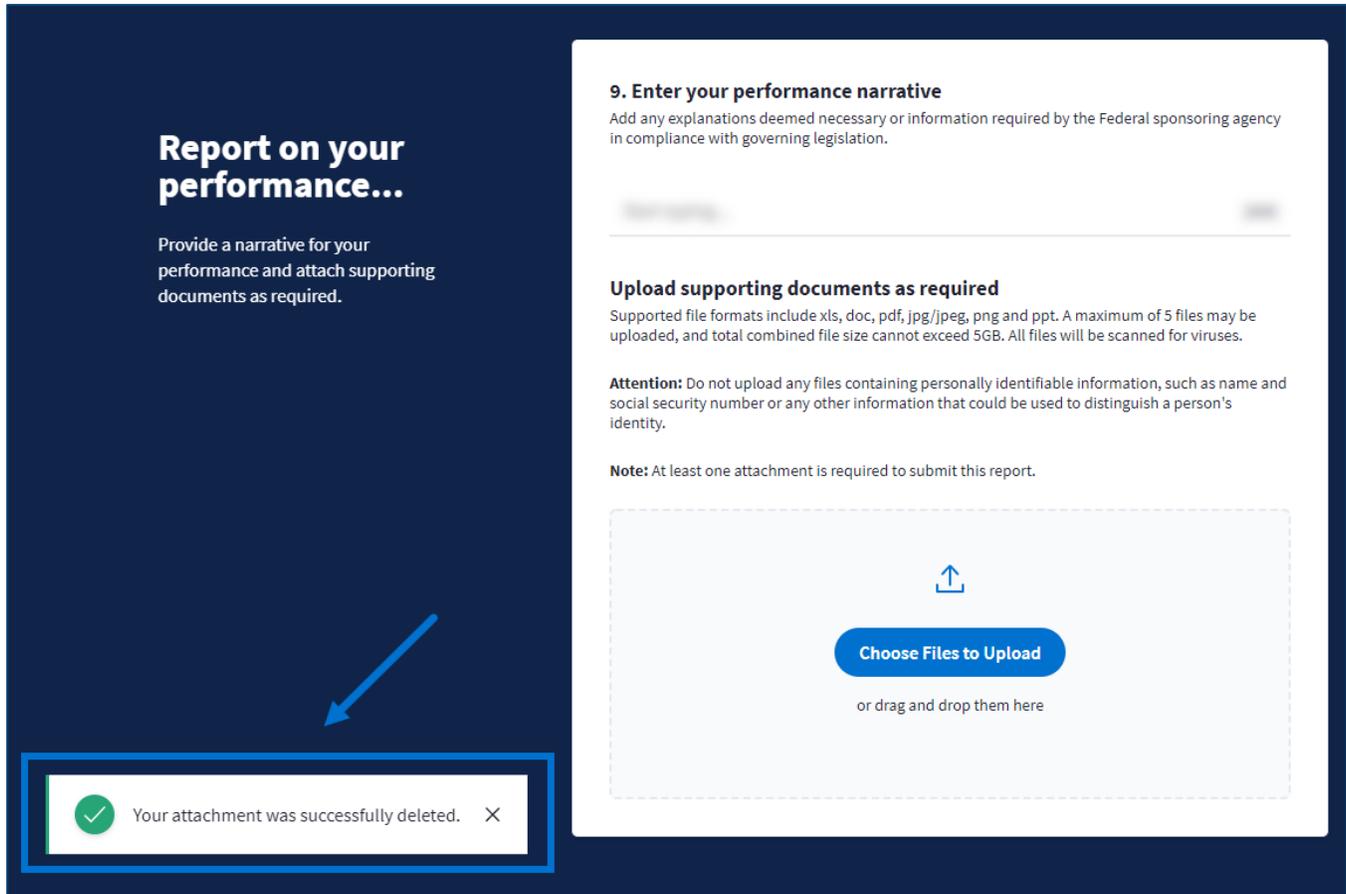
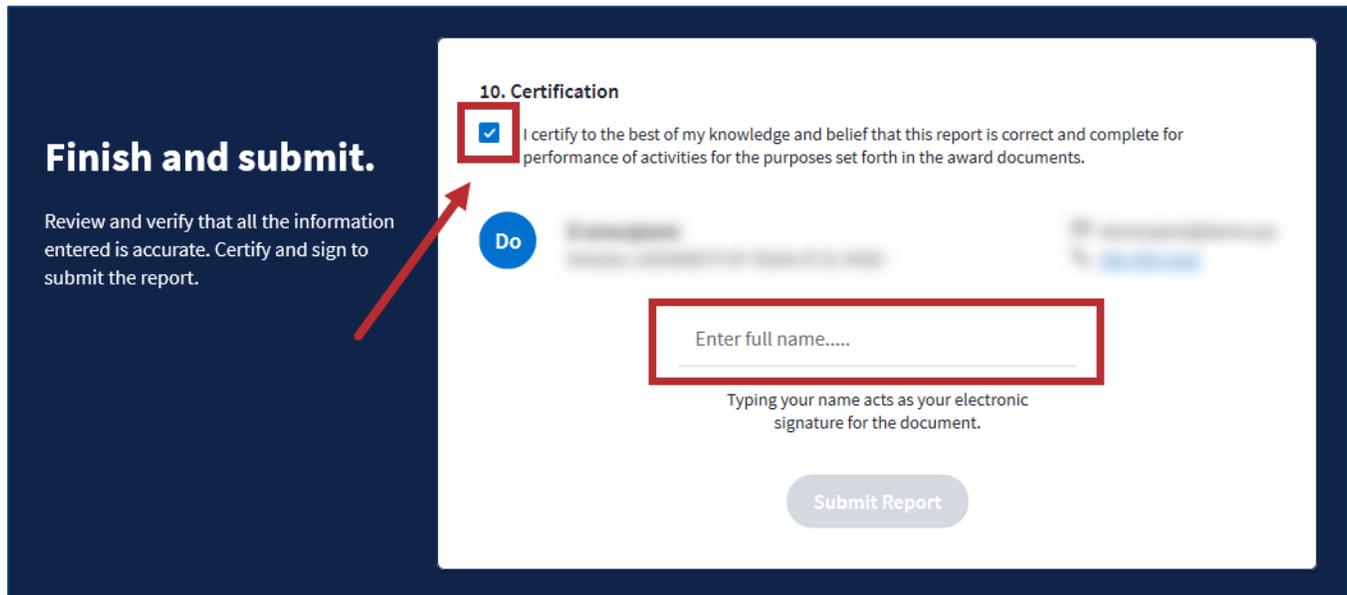


Figure 30: Performance Progress Report screen with Your attachment was successfully deleted message

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



**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.

**Do**

Enter full name.....

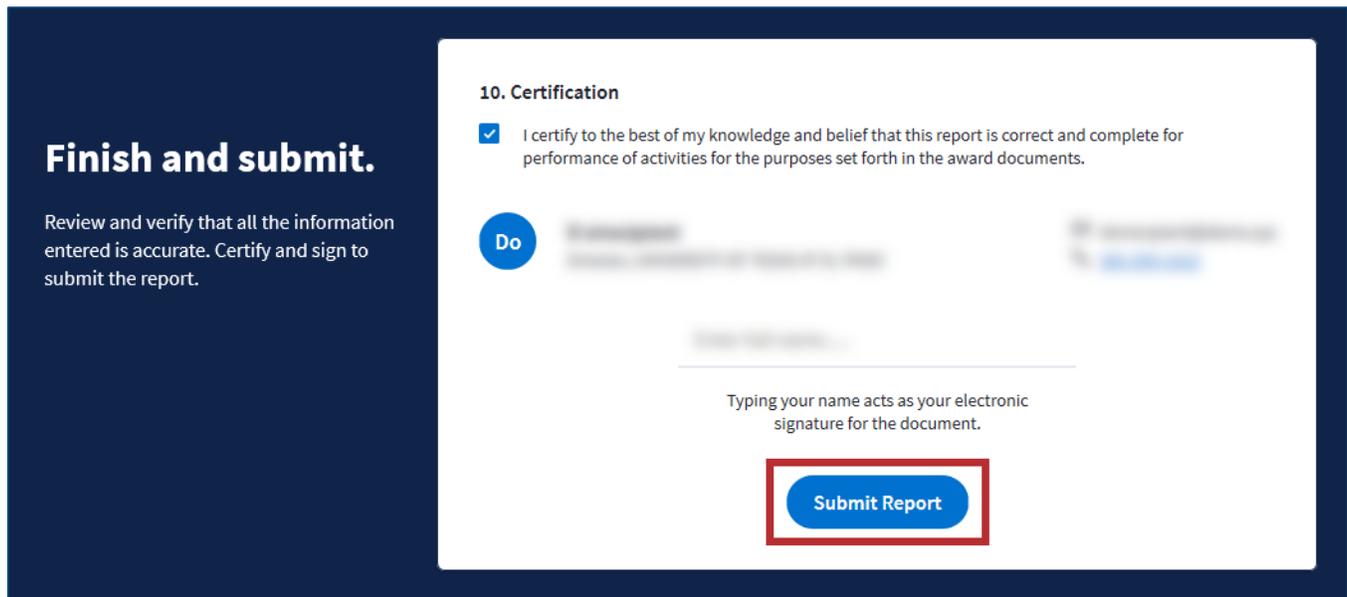
Typing your name acts as your electronic signature for the document.

Submit Report

Figure 31: Performance Progress Report screen with Certification checkbox and Enter full name field

10. 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.



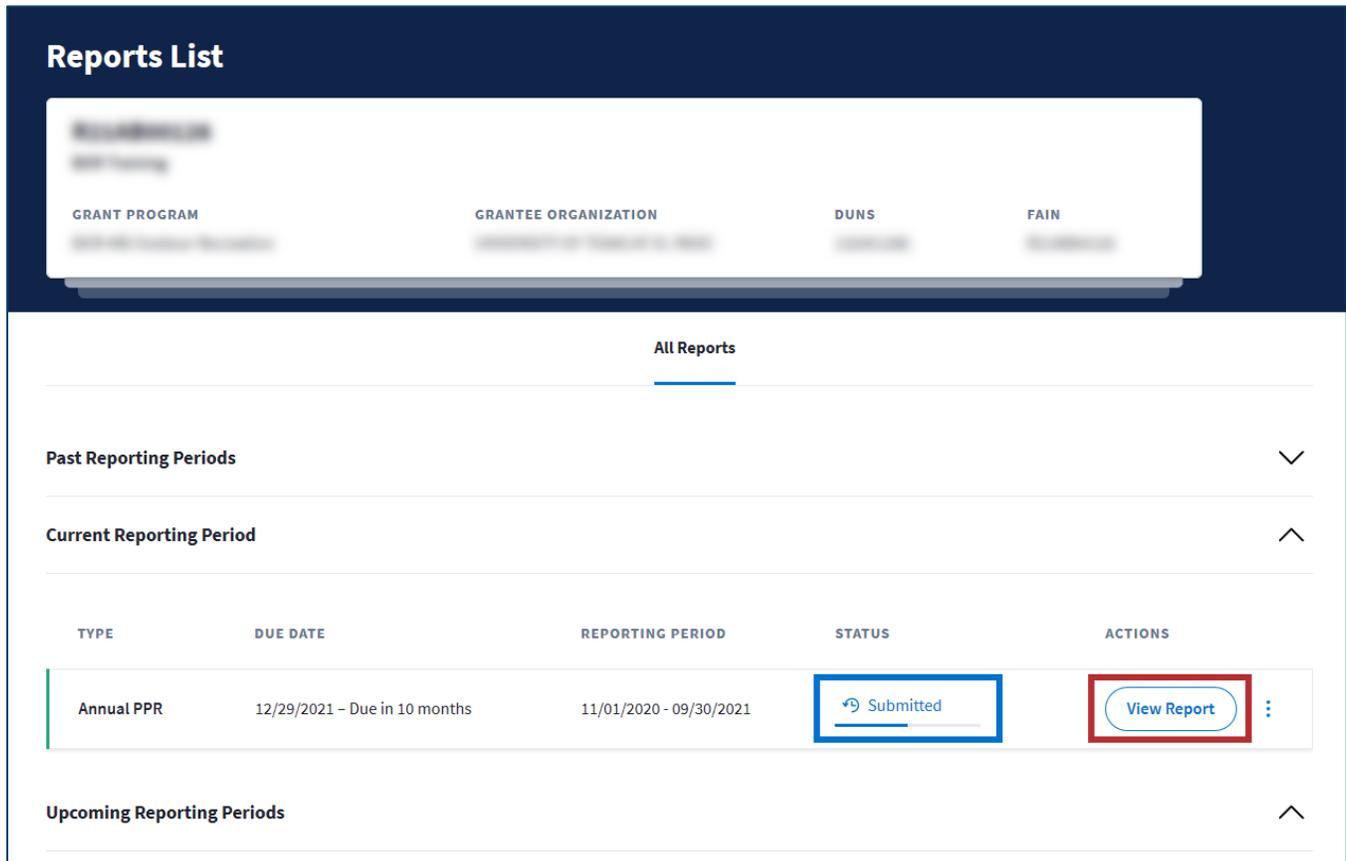
The screenshot shows a dark blue sidebar on the left with the text "Finish and submit." and "Review and verify that all the information entered is accurate. Certify and sign to submit the report." The main content area is white and contains the following elements:

- 10. Certification**
- A checked checkbox 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."
- A "Do" button (a blue circle with the word "Do" in white) next to a blurred text input field.
- A horizontal line below the input field.
- The text: "Typing your name acts as your electronic signature for the document."
- A blue "Submit Report" button, which is highlighted with a red rectangular border.

Figure 32: Performance Progress Report 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.



**Reports List**

GRANT PROGRAM GRANTEE ORGANIZATION DUNS FAIN

All Reports

Past Reporting Periods

Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Annual PPR	12/29/2021 – Due in 10 months	11/01/2020 - 09/30/2021	Submitted	View Report

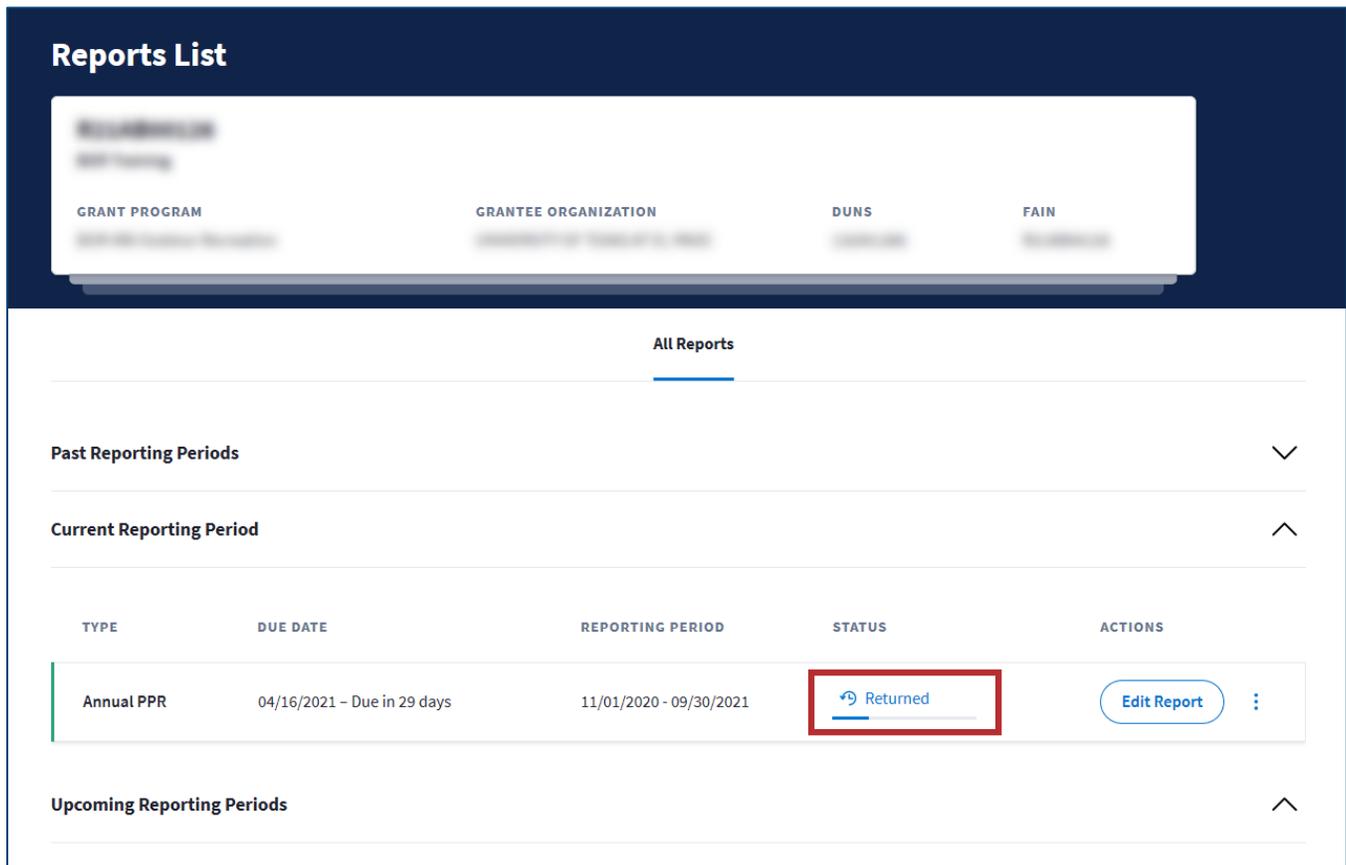
Upcoming Reporting Periods

Figure 33: 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.



**Reports List**

GRANT PROGRAM GRANTEE ORGANIZATION DUNS FAIN

All Reports

Past Reporting Periods

Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Annual PPR	04/16/2021 - Due in 29 days	11/01/2020 - 09/30/2021	Returned	Edit Report

Upcoming Reporting Periods

Figure 34: 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.

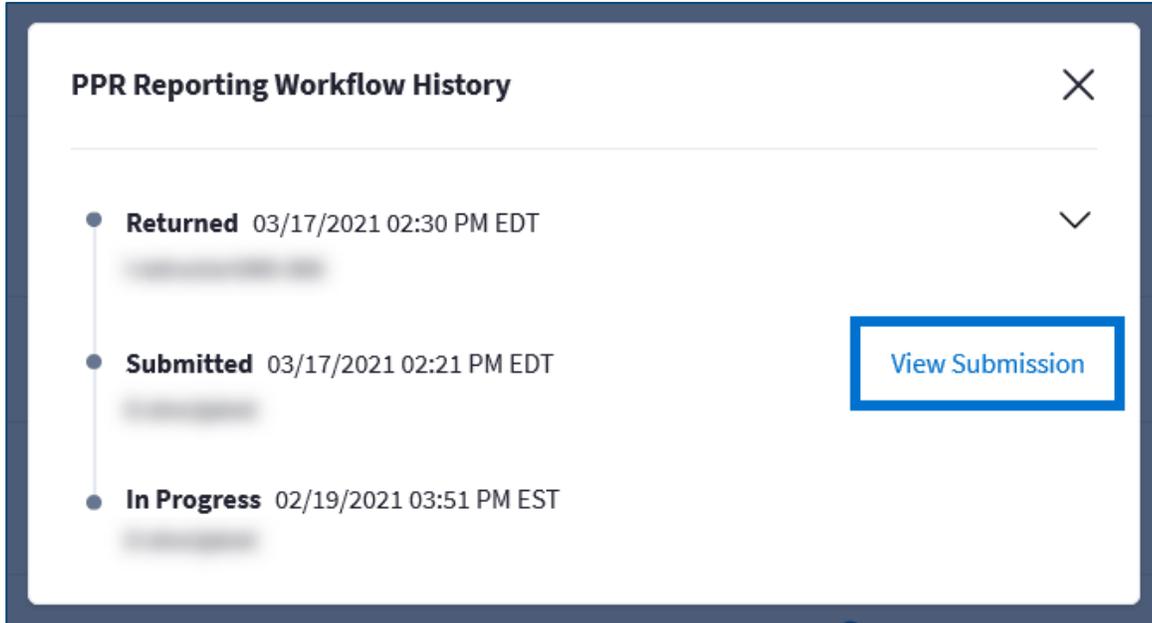
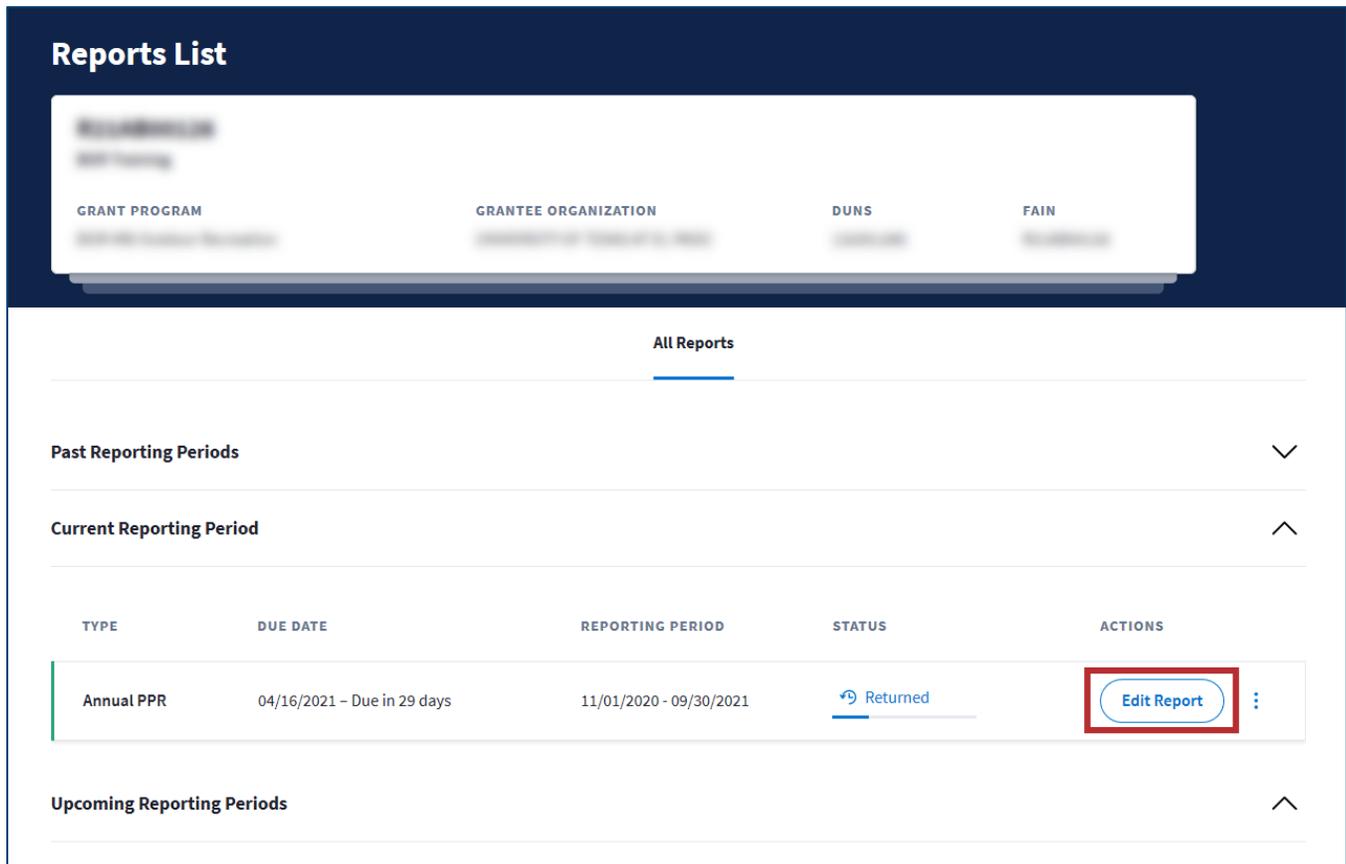


Figure 35: PPR Reporting Workflow History window with View Submission button

## 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	GRANTEE ORGANIZATION	DUNS	FAIN

**All Reports**

Past Reporting Periods

Current Reporting Period

TYPE	DUE DATE	REPORTING PERIOD	STATUS	ACTIONS
Annual PPR	04/16/2021 - Due in 29 days	11/01/2020 - 09/30/2021	Returned	Edit Report

Upcoming Reporting Periods

Figure 36: Reports List screen with Edit Report button