Performance Progress Reports Reference Guide for Federal Program Officers and Project Technical Monitors (Optional Reviewers)

Performance Progress Reports
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The purpose of this document is to provide Federal Program Officers (FPO's) and Project Technical Monitors (Optional Reviewers) with a step-by-step process for completing Performance Progress Reports and accessing Performance Progress Reports and Federal Financial Reports in Grants Online.
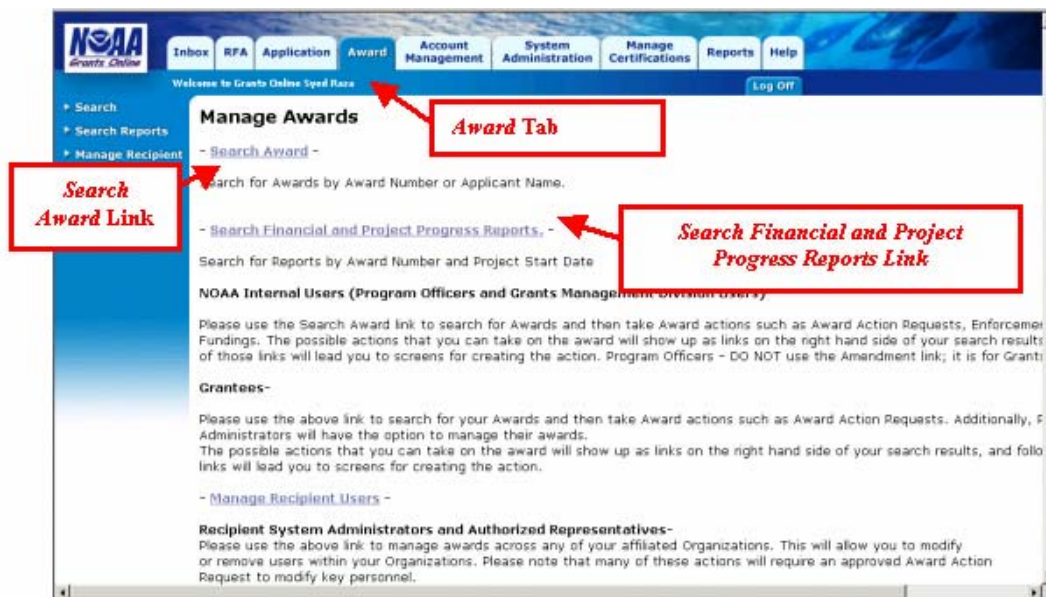
Completing the Performance Progress Report – Simple Version

Step 1: Log into Grants Online by entering your Username and Password.

Step 2: Select the *Award* tab and click on the *Search Award* link to complete the Performance Progress Report. The *Search Financial and Project Progress Reports* link retrieves previously filed reports (see page 15 of this guide for more detail).

Step 3: After selecting the *Search Award* link, enter at least one search criterion, including *Applicant Name* and/or *Award Number.* Click *Submit.*

Step 4: The following screen displays the search results. To select the Award, click on the actual Award number link in the *Award Number* column.

Step 5: Once you have selected an Award, the following *Grants File* screen is displayed.

Step 6: Scroll down to the bottom of the *Grants File* screen to view the *Associated Documents* section and select the ID link next to the Performance Progress Report you would like to complete. On a monthly basis, Grants Online will generate the Performance Progress Reports that are due for each month.

Step 7: Select the link entitled, *Go to Performance Progress Report Details Page*.

Step 8: The *Performance Progress Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

Step 9: Verify the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. Files may be attached by selecting the *Attach Files* link. Please note that only the *Simple Version* is authorized for use at this time. Once all the information has been verified and the files have been attached, click the *Save* button followed by the *Complete Report* button. This action will start the workflow for NOAA acceptance of the Progress Report.

Selecting a Technical Monitor as an Optional Reviewer

Step 1: After clicking the **Complete Report** button, the assigned Program Officer will have a task titled **Review Progress Report**. Select the **View** link.

Step 2: On the Progress Report Launch Page, the Program Office has several workflow options. In this example, we will send the Progress Report to two Project Technical Monitors (optional reviewers) for review. To set up the Technical Monitors as optional reviewers, choose **View Progress Report** and click **Submit**.

Step 3: On the Progress Report Details page, click the *Add* button to add Reviewers.

Recipient Authorized Representatives:
4 items found, displaying all items.**1**

Name	Telephone
Virginia Herring	601875-5912
Virginia Herring	601875-5912
Jason Keenum	228-875-5912
Jason Keenum	228875-5912

Optional Reviewers:
Nothing found to display.

Add **Done**
Please hit 'Done' to save the new route

Add Reviewers

Attach Files

Save **Complete Report** **Cancel**

Step 4: Search for the Technical Monitor (optional reviewer) and click on the *Select* link when found. You may also add a new user from this screen. Clicking *Select* will return you to the *Progress Report Details* page.

Search Users

Please leave all fields empty to search for all results

Enter search terms to find a user.

First Name	
Middle Name	
Last Name	White
Organization	
E-Mail Address	
State	Please select a state

Search **Cancel**

Enter Search Criteria

One item found.**1**

Action	Name	Organization	Title	Primary Phone	Primary Address
Select	WHITE, SUSAN	NOS Office of Ocean and Coastal Resource Management (OCRM)		3017133155	1305 EAST WEST SPRING, MD 20910

Add a new user >>

Select User From Returned List

Step 5: On the *Progress Report Details* Page, when finished adding Reviewers, click the *Done* button. You are returned to the Progress Report Launch Page.

Step 6: On the Progress Report Launch Page, launch the Optional Review. The task to conduct the Progress Report Review will be placed in all the Technical Monitors (optional reviewers) inboxes simultaneously.

Step 7: The task to Review the Progress Report is still in your inbox. You will receive a notification when the Technical Monitors (optional reviewers) have completed their tasks. You do not have to wait for the reviews to be returned before certifying. Certification will remove any tasks remaining in the Optional Reviewers' inboxes for this Progress Report.

7 items found, displaying all items.1

View	Task Id	Award Number	Task Name	Task Status	Document Type
View	72475	NA05NMF4070005	Review Progress Report	In Progress	Performance Progress

Navigate to the Progress Report

View the Workflow

Performance Progress Report - NA05NMF4070005 WorkFlow History Page

Name	Date Started	Date Completed	Performer	Role	Action Taken	Current Status
Review Progress Report	2005-11-18 14:14:39.0		Cynthia Binkley	ProgramOfficer	SendOptionalReview	In Progress
Review Progress Report			SUSAN WHITE	OptionalReviewer		Not Started
Review Progress Report			Jeffrey Brown	OptionalReviewer		Not Started

Cancel

All Reviewers and Program Officer have active tasks.

Reviewing the Performance Progress Report as a Technical Monitor (Optional Reviewer)

Step 1: After the Program Officer has selected the action to send the Progress Report to the optional reviewer, the Technical Monitor (optional reviewer) will have a task to review the Progress Report. Click on the Tasks link on the left side of the page to see assigned tasks. To view the report, select the *View* link next to the *Review Progress Report* task.

Step 2: The Technical Monitor (optional reviewer) will then have the option to submit optional review comments or view the Progress Report. First the Technical monitor will view the Progress Report and then select the action to submit optional review comments. To view the Progress Report, select *View Progress Report* from the action drop down menu followed by the *Submit* button.

Step 3: The *Performance Progress Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

Step 4: Verify the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. To view the attached files, select the *Attach Files* link. Once all the information has been verified, select the *Cancel* button.

Step 5: After viewing the Progress Report and entering comments in the Progress Report details page (see steps 3 and 4), you may enter additional internal comments in the comment field below the *Submit* button on the Performance Progress Report launch page. These comments will be viewable only by NOAA internal personnel through the workflow history link. After entering your comments, click the *Save Comment* button. Select *Submit Optional Review Comments* from the action drop down menu followed by the *Submit* button. This completes the *Review Progress Report* task for the Technical Monitor (optional reviewer).

Accessing Existing Performance Progress Reports and Financial Reports

Step 1: In order to search Financial and Performance Progress Reports, select the **Search Financial and Project Progress Reports** link from the **Award** tab.

Step 2: The screen below is displayed. Enter at least one search criterion, including **Award Number, Period Start Date, Program Officer Name** and **Report Type.** After entering the search criteria, click the **Search Reports** button**.**
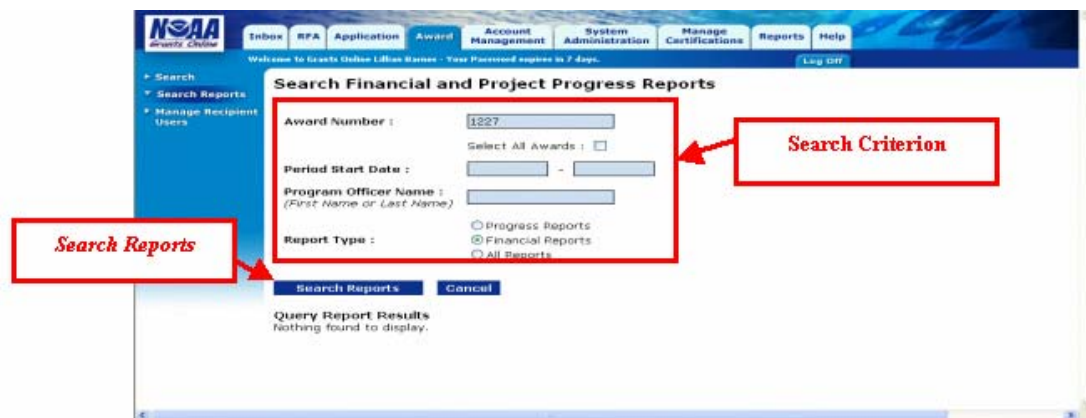
Step 3: The search results display all report types including the Performance Progress Reports and Financial Reports. To view a specific report, select the link for the report you would like to view from the ***Report*** column. This section will detail Financial Report information. (If you were to select the link for a Progress Report, you would have access to view the Progress Report information as detailed in pages 3-7 of this document.)

Please note that a Federal Program Officer (FPO) has view only access to the Federal Financial Progress Reports. Also, reports that were migrated from the NOAA Grants System (NGS) will display "Undefined" under the Program Officer column.

Step 4: The *Federal Financial Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

Step 5: The *Federal Financial Report - Simple Version* screen displays the Financial Report details including whether the report is the *Final Report,* the *Reporting Period* and the *Due Date.* The *Attached Report* radio buttons indicate the types of reports: SF-269, SF-272, or both.

When a report is generated, data related to *Cash Receipts (drawdowns)* and *Federal Funds Authorized* is retrieved from the CBS system. Once this report has been submitted to NOAA, these fields are locked records and are no longer pulled from the CBS system.

Please note that migrated Awards will not have reports attached; as such, the *Attached Report* field will indicate which type of report was migrated from NGS.

Step 6: At the bottom of the ***Federal Financial Report - Simple Version*** screen, you can click the link entitled, ***Attach Files*** to view any attached files. You may also select the ***Cancel*** button to return to the Federal Financial Report launch page.

Recipient Authorized Representatives:
7 items found, displaying all items.1

Name	Telephone
Stephen Barton	208334-3781
Mary Dudley	
Mary Dudley	208-327-7099
Bill Hutchinson	2083343791
James Lau	208334-3791
Virgil Moore	208334-3791
Jeff Seward	208334-3781

Attach Files link and *Cancel* button

Attach Files

Cancel