Financial and Project Progress Reports

Reference Guide for Grants Specialists
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Grants Specialists

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Creating Financial 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 Financial Progress Report.

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.

![Image of search results screen]

**NA17RJ1227 is the award number link in the Award Number column.**

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

![Image of grants file screen]

**Grants File - NA17RJ1227**

- **Creator:** Data Migration
- **Date Created:** 01/10/2006
- **Status:** Grants File Creation In Progress
- **Date Status:** 01/10/2006
- **Last Edited By:** Data Migration

This document currently has no tasks assigned to you. However, you may view previous workflow history and comments >>

**Grant Information**

- **CFDA Number:** 11.452
- **Award Period:** 07/01/2001 – 06/30/2003
- **Program Officer:** John Cortinas
- **Program Officer Phone:** 3017212465
- **Total Federal Funding:** $24,391,023.14
- **Total Non-Federal Funding:** $0.00
- **Organization Name:** University of Oklahoma
- **Progress Report:** N/A
- **Electronic Recipient Financial Report:** No

![Logo images]
Step 6: Scroll down to the bottom of the Grants File screen to view the Additional Documents section and select the Create Financial Report link. As a Grants Specialist, you have access to the following links which are addressed in this document: Create Financial Report, Create SF270, and Manual Closeout.

Step 7: Select the link entitled, Go to Federal Financial Report Details Page.
Step 8: 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 9: Complete the Federal Financial Report - Simple Version by entering whether the report is the Final Report, the Reporting Period, and the Due Date. The Attached Report radio buttons indicate the types of reports you can attach: SF-269, SF-272, or both. (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.) If you wish to attach files, you may do so by selecting the Attach Files link.

When a report is created, 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.

Step 1: At the bottom of the *Federal Financial Report - Simple Version* screen (see previous section Step 9), you can click the link entitled, *Click here to use the Expanded version of this Report.*

Federal Financial Report - NA17RJ1227

Please click on this icon to add your comments or view comments by other users on this report.

1. Federal Agency and Organization Element to which Report is submitted
   Department of Commerce/NOAA

2. Federal Grant or Other Identifying Number Assigned by Federal Agency (To report multiple grants, use FFR Attachments)
   NA17RJ1227

3. Recipient Organization (Name and complete address including zip code)
   University of Oklahoma
   1000 Asp Avenue, Room 314 Norman, OK 73019

4a. DUNS Number  4b. EIN Number  5. Recipient Identifying Number or Account Number
   0 735017987  NOAA

   ☐ Yes  ☐ No  ☐ Cash  ☐ Accrual

8. Project/Grant Period
   07/01/2001 - 04/30/2007

9. Reporting Period
   01/01/2005 - 09/01/2005

10. Transactions
11. Remarks

Recipient Business/Financial Representatives:
One item found: 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unknown Cr</td>
<td></td>
</tr>
</tbody>
</table>

Recipient Authorized Representatives:
3 items found, displaying all items: 1

<table>
<thead>
<tr>
<th>Name</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regina Hewatt</td>
<td>405-325-8054</td>
</tr>
<tr>
<td>Jennie Parker</td>
<td>405-325-6029</td>
</tr>
<tr>
<td>Tracy Rainke</td>
<td>405-325-3041</td>
</tr>
</tbody>
</table>

Click here to use the Simple version of this report.

Save  Done  Cancel  Print Report
Step 3: At the bottom of the Expanded Version of the Federal Financial Report, click on the link entitled, **Transactions** to enter financial report information.

Step 4: Enter financial report transaction information and click the **Save** button at the bottom of the screen.

**Federal Financial Report -- Transactions**

<table>
<thead>
<tr>
<th>1. Federal Agency and Organization</th>
<th>1. Federal Agency and Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Federal Grant or Other Identifying Number Assigned by Federal Agency</td>
<td>1. Federal Grant or Other Identifying Number Assigned by Federal Agency</td>
</tr>
<tr>
<td>Department of Commerce/NOAA</td>
<td>Department of Commerce/NOAA</td>
</tr>
<tr>
<td>4e. DUNS Number</td>
<td>4e. DUNS Number</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Transactions**

- **Federal Cash:**
  - a. Cash Receipts (Drawdowns): $0.00
  - b. Cash Disbursements: $0.00
  - c. Cash on Hand (line a minus b): $0.00

- **Federal Expenditures and Unobligated Balance:**
  - d. Total Federal Funds Authorized: $0.00
  - e. Federal share of expenditures: $0.00
  - f. Federal share of unliquidated obligations: $0.00
  - g. Total Federal share (sum of lines e and f): $0.00
  - h. Unobligated balance of Federal Funds (line d minus g): $0.00

- **Recipient Share:**
  - i. Total recipient share required: $0.00
Step 5: At the bottom of the Expanded Version of the Federal Financial Report, click on the link entitled, Remarks to enter comments related to the financial report.

Step 6: Enter comments and click the Save button, followed by the Done button. You can also attach files by clicking on the Attach Files link.
Step 7: Once all the data has been entered, click **Save** followed by the **Done** button. You also have the option to click the **Print Report** button.

### Federal Financial Report - NA17RJ1227

1. **Federal Agency and Organization**
   
   Department of Commerce/NOAA

2. **Federal Grant or Other Identifying Number**
   
   Assigned by Federal Agency (To report multiple grants, use FFR Attachments)
   
   NA17RJ1227

3. **Recipient Organization**
   
   (Name and complete address including zip code)
   
   University of Oklahoma
   
   1000 Asp Avenue, Room 314 Norman, OK 73019

<table>
<thead>
<tr>
<th>4a. DUNS Number</th>
<th>4b. EIN Number</th>
<th>5. Recipient Identifying Number or Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>736017987</td>
<td>NOAA</td>
</tr>
</tbody>
</table>

6. **Final Report**

7. **Basis of Accounting**

   - Yes
   - No
   - Cash
   - Accrual

8. **Project/Grant Period**

   07/01/2001 - 04/30/2007

9. **Reporting Period**

   01/01/2005 - 09/01/2005

10. **Transactions**

11. **Remarks**

**Recipient Business/Financial Representatives:**

One item found.

<table>
<thead>
<tr>
<th>Name</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unknown Or</td>
<td></td>
</tr>
</tbody>
</table>

**Recipient Authorized Representatives:**

3 items found, displaying all items.

<table>
<thead>
<tr>
<th>Name</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regina Hewitt</td>
<td>405-325-6054</td>
</tr>
<tr>
<td>Jennie Parker</td>
<td>405-325-6029</td>
</tr>
<tr>
<td>Tracy Reineke</td>
<td>405-325-3041</td>
</tr>
</tbody>
</table>

Click here to use the Simple version of this report.

**Save, Done and Print Report buttons**
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**Step 8:** After clicking the *Print Report* button, the following screen displays the printable Federal Financial Report.

**Step 9:** If you click on the *Workflow History* link on the Financial Progress Report screen, you can view details on the actions taken on the report.

**Federal Financial Report - NA17RJ1227**

<table>
<thead>
<tr>
<th>Id:</th>
<th>2018889</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creator:</td>
<td>Syed Raza</td>
</tr>
<tr>
<td>Create Date:</td>
<td>11/14/2005</td>
</tr>
<tr>
<td>Status Date:</td>
<td>11/16/2005</td>
</tr>
<tr>
<td>Last Edited User:</td>
<td>Fatima Zehr</td>
</tr>
</tbody>
</table>

Go to Federal Financial Report Details Page >>

This document currently has no tasks assigned to you. However, you may view previous workflow history and comments >>
Creating the SF270 Report – Simple Version

**Step 1:** Complete steps 1 through 5 in the *Financial Progress Reports – Simple Version* section. Scroll down to the bottom of the *Grants File* screen to view the *Additional Documents* section and select the *Create SF270* link.
Step 2: The Request for Advance or Reimbursement - Simple Version screen is displayed. Complete the report information as required.

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 3: Once all the information has been entered, you can click the Save button followed by the Complete Report button. To complete the expanded version of the report select the link entitled, Click here to use the Expanded version of this Report.
Creating the SF270 Report – Expanded Version

Step 1: Upon selecting the link entitled Click here to use the Expanded version of this Report (see step 3 in prior section), the following screen is displayed. Enter report information and click the Save button followed by the Done button.

Request for Advance or Reimbursement - NA17RJ1227

1. Type of Payment Requested* (a.) c. Advance c. Reimbursement (b.) c. Final c. Partial
2. Basis of Request* c. Cash c. Accrual
3. Federal Agency and Organization Element to Which Report is Submitted Department of Commerce/NOAA
4. Federal Grant or Other Identifying Number Assigned by Federal Agency NA17RJ1227
5. Partial Payment Request Number For This Request 0

6. EIN Number 736017987
7. Recipient Identifying Number or Account Number NOAA
8. Period Covered By This Request * (MM/DD/YYYY - MM/DD/YYYY)

9. Recipient Organization University of Oklahoma
   1000 Asp Avenue, Room 314 Norman, OK 73019

10. Payee Where payment is to be sent if different than item 9
    Name:
    Address:

Please select a Type of Payment and Press 'Save'

SF-270 Instructions

Click here to use the Simple version of this report.
Step 5: After clicking the **Print Report** button, the following screen displays the printable SF270 Report.

```
<table>
<thead>
<tr>
<th>REQUEST FOR ADVANCE OF REIMBURSEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>X REFNSL NO.</td>
</tr>
<tr>
<td>1. TYPE OF PAYMENT</td>
</tr>
<tr>
<td>2. BASIS OF REQUEST</td>
</tr>
<tr>
<td>3. PERIOD COVERED BY THIS REQUEST</td>
</tr>
<tr>
<td>4. PAYMENT REQUEST</td>
</tr>
<tr>
<td>5. RECIPENT ORGANIZATION</td>
</tr>
<tr>
<td>6. COMPARISON OF AMOUNT OF REIMBURSEMENTS/ADVANCES REQUESTED</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>1st month</th>
<th>2nd month</th>
<th>3rd month</th>
<th>4th month</th>
<th>5th month</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
```
Completing Manual Closeout

Step 1: Complete steps 1 through 5 in the Financial Progress Reports – Simple Version section. Scroll down to the bottom of the Grants File screen to view the Additional Documents section and select the Manual Closeout link.

Step 2: Complete the closeout questionnaire and click the Save button. You may attach files using the Attach Files link at the bottom of the page. Once you click the Close Award button, the document will be locked and you will not be able to make any modifications.
Accessing Existing Financial and Project Progress Reports

Step 1: In order to search Financial and Project 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.
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Step 3: The search results display all report types including the Project 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.

**Search Financial and Project Progress Reports**

<table>
<thead>
<tr>
<th>Award Number :</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All Awards :</td>
<td>☐</td>
</tr>
<tr>
<td>Period Start Date :</td>
<td></td>
</tr>
<tr>
<td>Program Officer Name : (First Name or Last Name)</td>
<td></td>
</tr>
</tbody>
</table>

- Progress Reports
- Financial Reports
- All Reports

**Search Reports**  **Cancel**

**Query Report Results**
0 items found, displaying all items.

<table>
<thead>
<tr>
<th>Report</th>
<th>Award Number</th>
<th>Reporting Period Start</th>
<th>Reporting Period End</th>
<th>Due Date</th>
<th>Program Officer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Report</td>
<td>NA17RJ1227</td>
<td>01/01/2005</td>
<td>09/01/2008</td>
<td>11/14/2005</td>
<td>Undefined</td>
</tr>
<tr>
<td>SF270</td>
<td>NA17RJ1227</td>
<td>01/01/2005</td>
<td>09/30/2005</td>
<td>11/15/2005</td>
<td>Undefined</td>
</tr>
<tr>
<td>Progress Report</td>
<td>NA17FX2010</td>
<td>01/01/2001</td>
<td>06/30/2005</td>
<td></td>
<td>Dennis A. Seem</td>
</tr>
</tbody>
</table>
Step 4: If you selected Progress Report in Step 3, the *Performance Progress Report - Simple Version* screen is displayed. (Please note that if you selected Financial Report in Step 3, Grants Online will take you to the Extended Version of the Federal Financial report, as detailed in the previous section.)

Step 5: To view the Expanded version of the *Performance Progress Report*, click on the link entitled, “Click here to use the Expanded version of this report.” Please note that the Expanded Version of this report has not yet been approved by OMB for use at NOAA. Further guidance will be provided regarding this report at a later date.
Step 7: Upon selecting the **Performance Measures** link, view the data provided.

![Performance Measures](image)

Step 8: Upon selecting the **Program/Project Management** link, view the data provided.

![Program/Project Management](image)
Step 9: Upon selecting the **Sub-Award Management** link, view the data provided.

Step 10: Upon selecting the **Activity Based Budget** link, view the data provided.

Step 11: Upon selecting the **Performance Narrative** link, view the data provided.
Step 12: To view the printable version of the Project Progress Report, select the **Print Report** button from the **Performance Progress Report – Simple Version** screen.

Step 13: The following screen displays the printable version of the Project Progress Report.