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

![Awards Search Screen](image)

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

![Search Award Screen](image)
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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.
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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.

Associated Documents

<table>
<thead>
<tr>
<th>Type</th>
<th>ID</th>
<th>Title</th>
<th>Creator</th>
<th>Create Date</th>
<th>Last Action User</th>
<th>Status</th>
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</thead>
<tbody>
<tr>
<td>Award Action</td>
<td>2019980</td>
<td>Reprogram or Rebudget</td>
<td>System Account</td>
<td>11/22/2005</td>
<td>Complete ForwardToAgency</td>
<td>RecipientAuthorizedRepresentativeActions</td>
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<td>Award Action</td>
<td>2020099</td>
<td>Reprogram or Rebudget</td>
<td>System Account</td>
<td>11/23/2005</td>
<td>Complete ForwardToAgency</td>
<td>RecipientAuthorizedRepresentativeActions</td>
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<td>Reprogram or Rebudget</td>
<td>System Account</td>
<td>11/23/2005</td>
<td>Completed</td>
<td></td>
</tr>
</tbody>
</table>
| Performance Progress Report | 02035945 | Performance Progress Report | 01/01/2005 | Tahima Zahir | 02/23/2006 Tahima Zahir | IN Progress |}

Select the ID link of the Report you would like to complete.

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Telephone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virginia Herring</td>
<td>601875-5912</td>
</tr>
<tr>
<td>Virginia Herring</td>
<td>601875-5912</td>
</tr>
<tr>
<td>Jason Keenum</td>
<td>228-875-5912</td>
</tr>
<tr>
<td>Jason Keenum</td>
<td>228875-5912</td>
</tr>
</tbody>
</table>

**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.
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.

Navigate to the Progress Report

View the Workflow

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.

![Image of tasks](image)

**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.

![Image of review](image)
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.