

# Subgrantee How-to: Fill Out a Report Transcript

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## Show Intro Slide of Recording Session

Hello. Welcome to the training on how to fill out a subgrantee progress report in the Formula Subgrantee Progress reporting tool. This training is intended for formula state administrators and subgrantees who are filling out subgrantee progress reports.

This training video will cover how to:

- Access a subgrantee report;
- Navigate and fill out a report; and
- Submit a subgrantee report.

## Zoom recording Section

### How to access and fill out a subgrantee report

#### ***How to Access Blank Reports***

Subgrantees will receive a link to access a blank report from their State Administrator. That link is the only way subgrantees will be able to begin a report.

Once a subgrantee clicks on the link provided to them by their State Administrator, they are brought to a Brief Instructions page that provides information on what the report is and what is required. Click “Start New Report” to begin filling out the report. The first page that appears requests some general information. All questions on this page must be answered before moving onto the rest of the report. The subgrantee name and point of contact information entered in this section will be used by SAs to monitor reports.

A SA can fill out a subgrantee report on behalf of a subgrantee by accessing a blank report the same way a subgrantee would and filling out the required information.

Once the general information is filled out, click “save and continue.” A new page will open that provides the unique URL specific to the report that was just started. Be sure to save the newly generated URL for future use so the report can be accessed at a different point in time. Anybody with this link will be able to access the report.

Once the link is saved, click “continue.” The rest of the report will open. The first page will contain the information that was filled out when starting the report. Fill out the rest of the report by providing the requested information. Navigate the report by using the buttons at the bottom of the screen or by using the navigation pane.

**PAUSE – go back to blank report**

## ***How to Access Reports in Progress***

A subgrantee can access an in-progress report by viewing the URL (link) for their specific report. If a subgrantee does not have their report's URL, there are a couple of ways they can get it. One way is to locate the Blank Report URL their State Administrator provided them initially, click the link and then use the "Find My Report" function at the bottom of the instructions page.

To use the "Find My Report" function, **enter the email address** that was entered into the Point of Contact field of the report in question. Click "Find My Report" and the email address entered will receive an email with a link to the report.

Another way for subgrantees to access their report-in-progress is to request their report's unique link from their State Administrator. State Administrators can generate the report's unique URL by clicking the URL button for the corresponding report in their State Dashboard.

The unique link for a specific report can be shared and accessed by more than one person. If a subgrantee has a grant partner that needs to fill out a section of the reporting form, the grant partner can use the report's unique link to access it and enter the needed information.

Two people may access, enter, and edit data into a given subgrantee report at the same time (in other words, if a subgrantee shares their report's link with a grant partner, both people could be filling it out at the same time). However, if two people try to edit the same question at the same time, the changes that are saved last will overwrite any previously saved data.

**PAUSE – open an in progress report**

### ***Sharing a specific page in the Report***

If at any point while working on a report, a subgrantee or state administrator wants to share a specific page in a subgrantee's report, they can simply **copy the URL for that page** from their web browser and paste it into their communication with that person. Once the person clicks the link, they'll be brought directly to that specific page.

**PAUSE**

### *Saving your Progress/Returning*

A subgrantee can save the report and return to it later by clicking on the “Save Progress and Continue Later” button. Once this button is clicked, a popup will appear and provide the report’s URL which should be saved and used to return to the report. This URL is the report’s unique link, which is the same link provided to the subgrantee when they began their report.

### **CHANGE SOMETHING**

If a subgrantee tries to leave a page without saving their changes, a popup will appear and ask if they are sure they want to leave without saving. Click “OK” to leave without saving. Click “Cancel” to save the data changes by clicking one of the save buttons. **CLICK CANCEL**

### **PAUSE**

#### *Mandatory vs Optional Questions*

In both the STOP and SASP reports, there are mandatory and optional sections. Subgrantees should answer all required sections and questions. Required questions are marked with an asterisk next to the question.

For optional sections, subgrantees will need to answer an initial question about whether or not they used grant funds to support the respective activities. If they did not use grant funds to support those activities, they will click “No” and the rest of that section will be skipped. If they did use grant funds to support those activities, they will click “Yes” and then answer the following questions.

If the subgrantee does not wish or need to respond to an optional question, they must still click one of the “save” buttons at the bottom of the page to show that they have at least viewed the question.

If a subgrantee clicks “Yes” funds were used for an activity and begins filling out the section, but then later decides, actually this is a “No” and changes the selection to “No,” the system will delete all of the data previously entered into the section. If for some reason they click “Yes” again after clicking “No” the entire section will be blank; no data is retained.

### **PAUSE - GO TO VS SECTION**

The question numbers in each section are dynamic and start over at the start of each section. When referencing a specific question on the report in the separate instructions, the subgrantee will need to know which section the question is in and the question number. For example, Staff Question 1.

## PAUSE

### *Navigating a report*

To move between report pages, click the blue buttons at the bottom of the page. To move forward, click “Save and Go to Next Page.” To move backward, click “Save and Go to Previous Page.” Clicking either of these buttons will save the entered data before moving on to another page.

In addition to using the Previous and Next buttons, a subgrantee can use the navigation pane on the left side of the page to move between sections and/or pages of the report by clicking on the section or page they’d like to review.

## PAUSE – MAKE VALIDATION ERROR

### ***Validation Requirements***

The subgrantee report contains coding that makes sure specific requirements are met before the report can be submitted. Validation checks actively happen while data is entered into the report. All validation requirements must be met in order to submit the report to the SA.

Validation errors will be indicated in the report a few different ways:

- A red error message will appear on the page next to the field with the error;
- A yellow exclamation mark will appear in the navigation pane next to the page and section that has the error; and
- The Validate and Submit page will list out any sections that have validation errors.

If there is a validation error on the current page, the subgrantee will not be able to move on to the next page using the “Save and Go to Next Page” button until the issue has been addressed. If a subgrantee needs to move to a different page, they need to use the navigation pane by clicking on the section or page they need.

Once all validation requirements are fulfilled in each section, a green check mark will appear next to the section's name in the navigation pane, signaling the section is complete.

"Validate and Submit" is the last section of the report, and it does a final check to make sure all reporting requirements have been met. A report can only be submitted once all the validation requirements have been met. If there are any issues that need to be addressed, a list of all sections that contain issues will appear. The list is linked so the subgrantee can click on the section they would like to review and will be brought directly to that section.

The report is successfully validated when all sections and pages have green checkmarks and no validation issues appear on the "Validate and Submit" page. At this point, the report is ready for submission to the SA.

### ***Completing a Report***

In the "Validate and Submit" section, click "Submit" when the report is ready for submission. A popup window will appear and ask the subgrantee if they are sure they want to submit the report. Click "OK" to submit the report. Once a subgrantee has submitted their report, the subgrantee will no longer be able to access the report. The report's unique link will bring subgrantees to a page that informs them that their report has been submitted and cannot be viewed or edited. Subgrantees will still be able to download their data as an Excel file using the "Download Report" button.

If a subgrantee needs to make edits to their report, the SA will need to unlock the report. The SA must then inform the subgrantee the report has been unlocked.

### **Last slide**

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