U.S. Department of Education’s Electronic Grant Initiatives

FY 2009

E-Reports Overview
OESE
Project Directors’ Meeting
December 17, 2008
Electronic Grants Overview with Grants.gov

The image shows a cylinder representing the GAPS database with arrows pointing from e-Application, e-Reports, e-Reader, e-Payments and e-Administration to the GAPS database. There is also a note next to e-Administration indicating that special training is available.
e-Grants Hours of Operation

All e-Grants users have access to the e-Grants and e-Payments websites during the following hours (Washington, DC time):

- Monday 6:00 am - Wednesday 7:00 pm
- Thursday 6:00 am – Sunday 8:00 pm

Any one-time exceptions to this regular schedule will be posted on the site under the Hours of Operation link.

Help Desk hours are: 8 am- 6 pm Monday-Friday
e-Reports

- Web-enabled the current paper-based Grant Report Process

- e-Reports is similar to e-Application

- Grantees prepare & submit Grant Reports via the Internet

- Integrated with the GAPS Database

Note: Only Project Directors can initiate an e-Report
e-Grants Registration Enhancement

- The e-Grants registration process has a single login for all e-Grants components allowing access only to the appropriate modules. Therefore, if you already have access to another module, you may simply need to modify your access to include e-Reports.

- The first step remains the same which is to go to http://e-grants.ed.gov and click the continue button and the page below will be displayed.

- Existing users will enter their user name and password. If the user is new, then they would click on the register button to begin.
New Users

- New users click on the register button to begin.
- On the User Registration page, the user should select the e-Grants module that they want access to and click the next button (in this case, e-Reports).
- The new user will be directed to the appropriate registration screen where they enter information.
e-Grants Registration Process

- The new user completes a user profile (which includes address, phone, fax, etc.).
- On the Profile screen, the user also creates a User Name. After clicking the Submit button, a system generated password is e-mailed to the user.

![User Registration Form]

- Last Name:
- First Name:
- Middle Initial:
- EIN:
- Address Line 1:
- Address Line 2:
- City:
- State:
- Zip:
- Telephone #:
- Fax #:
- Primary E-Mail Address:
- Repeat Primary E-Mail Address:
- Receive Notifications at Primary E-Mail Address:
- Alternate E-Mail Address:
- Repeat Alternate E-Mail Address:
- Receive Notifications at Alternate E-Mail Address:
- Subscribe to Newsletter:
- Username:

NOTE: This EIN is valid only for Project Directors who have already received grants from Education and wish to submit electronic reporting or administrative actions.
Existing Users

- Existing users should enter their user name and password and click the login button to begin (see A below).
- On the next page, the user will be shown the e-Grants modules they have access to. The user should click on the e-Reports module and they will be redirected to the e-Reports homepage. (see B below).
- If you do not remember your username and/or password, click the “I forgot my username / password” link and you will be prompted to enter your username or your email address. An email will be sent to you providing your username and a new password.
Existing Users - Continued

- Or, if the user does not currently have access to e-Reports, they will need to click on the e-Reports link under the modules they do not have access to (see C below).
- After clicking on e-Reports, a prompt will appear requiring the user’s DUNS number (see D below).

C

D
e-Reports Start & Milestones Pages

After completing the registration or logging in, users should click on the start page where all PR award numbers associated with this Project Director and DUNS number will be listed.

The user clicks on the PR Award # to access the reports on the Milestones page.

The Milestones page also displays the status of the report (Blank, Draft, Submitted).

The user clicks on the Report type title listed to access a performance report.

You are logged in as sgoody

Below is a list of Performance Reports with which you are associated.

Click on a "not created" Award Type to create a new report.

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Budget Period</th>
<th>*Due Date</th>
<th>Last updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Performance</td>
<td>1</td>
<td>04/04/2005 4:30 PM</td>
<td>01/13/2005 2:22 PM</td>
<td>Draft</td>
</tr>
<tr>
<td>AdHoc Performance</td>
<td>1</td>
<td>04/15/2005 4:30 PM</td>
<td>01/13/2005 11:32 AM</td>
<td>Submitted</td>
</tr>
</tbody>
</table>
Performance Report

You are logged in as **Kemple08** (Project Director/Report Manager)

Technology Education Performance Report
PR/Award # R305B070702 - MDRC

Legend
- Blank
- Draft
- Completed
- Print/View
- Locked

Report Forms

- Grant Performance Report Cover Sheet (ED 524B) - Revised 2008  (05/21/2008 10:35 AM)
- Grant Performance Report (ED 524B) Project Status Chart - Section A  (05/21/2008 10:35 AM)
- Grant Performance Report (ED 524B) Project Status Chart - Section B & C  (05/21/2008 10:35 AM)
- Project Narrative - Attach chart here  (05/21/2008 10:35 AM)

Important Information
- Due Date: 06/15/2008 4:30 PM
- Last Updated: 05/21/2008 10:35 AM
- Contact Person: David A Sweet (202-219-15

Documents & Instructions
- ED 524B Instructions

Report Management
- Reports History

Ready to submit
DEAR COLLEAGUE LETTER

Dear RSA Grantee:

The purpose of this letter is to provide you with the information necessary to submit an Annual Performance Report for your Federally-sponsored project. As you are aware, Annual Performance Reports are required on discretionary grant projects in order to determine a recipient of Federal funds has made substantial progress toward the achievement of approved objectives. A determination that "substantial progress" has been achieved is one criterion used in making continuation awards to recipients whose project periods have not yet ended.

This year, I am pleased to announce that the Department has initiated a new "electronic" report form that you can use to submit your annual report. With this form, you can submit your annual report over the web. Details are included in the letter that follows. While electronic submission is optional this year, I strongly encourage you to consider using this new approach, as it results in a more efficient and effective system for administering our grants.

The Annual Performance Report, whether electronic or the traditional hard copy format, provides information on your progress made in conducting programmatic activities; budget expenditures and changes; and changes in project activities, objectives, and/or scope. Recipients in the first year of their project periods will report on activities that have been conducted since the beginning of the project period; other recipients will report on activities that have been conducted since submission of the last performance report.

The instructions provide additional information on submitting the report. Please review these instructions carefully. In addition, when describing your progress toward accomplishing project objectives under Section III, Project Status, Long-Term Training grantees should clearly reflect the number and current program status of all trainees who received RSA support under this project during the period covered by the report.

In order to review the reports and award continuation grants in a timely manner, the performance report must be received...
Grantees must complete all three parts of the 524B form (Cover Sheet, Project Status Chart A, and Project Status Chart – Sections B & C).

Program Staff will receive an e-mail message alerting them to the change(s) made to the Cover Sheet. However, these changes are not automatic; an Admin Action will still need to be completed in GAPS by the ED Program Contact.

Grantees will provide Authorized Representative Information on the Submission page. The Form Completed box must be checked for a form to be listed in Completed status.
Performance Objective data is entered on Section A, including quantitative information related to performance measures, if applicable.

### SECTION A - Project Objectives Information and Related Performance Measures Data

1. Project Objective □ Check if this is a status update for the previous budget period.
   - Testing Students in Math/Science

<table>
<thead>
<tr>
<th>Performance Measure</th>
<th>Measure Type</th>
<th>Quantitative Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test all 6th graders to determine if they are proficient in grade level math/science.</td>
<td>PROJECT</td>
<td>Raw Number / 700</td>
</tr>
<tr>
<td>Confirm the passing rate of 8th graders.</td>
<td>PROJECT</td>
<td>Raw Number / 700</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Additional project objectives can be added to Section A and/or performance measures within an objective. Grantees should follow the 524B instructions and any guidance provided by the ED program office.

<table>
<thead>
<tr>
<th>Performance Measure</th>
<th>Measure Type</th>
<th>Quantitative Data</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Target</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Raw Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Raw Number</td>
</tr>
</tbody>
</table>

Explanation of Progress (Include Qualitative Data and Data Collection Information)

Form Completed

Save | Cancel | Add Another Project Objective | Delete Current Form
ED 524B Forms – Sections B & C

A template is provided for both Sections B and C. These can be accessed by using the Download button and saving the document to your desktop. After completing these sections, the newly created file can be uploaded in response to these sections by using the Browse button and attaching the appropriate file from the user’s desktop.
Completing Narrative Sections

- Narrative sections are completed by uploading a .doc, .rtf, .pdf attachment.
- The Form Completed box must be checked for a narrative to be listed in Completed status.
- Click Save to save the entered information.
- Note: Only a few reports require the use of separate narrative sections.
After the user clicks on the *Ready to Submit* button, the user will enter the Authorized Representative Information and click the *Submit* button.

You are submitting this information on behalf of the Authorized Representative. By submitting this performance report I certify that the authorizing representative of the grantee's organization has approved this report.

**Warning!** All grantees must follow the internal administrative and clearance procedures of their organization. It is a fraud and a Federal felony to submit this report if not approved by an Authorized Representative for your institution.
Faxing the Signed 524B

- Grantees are required to fax the signed 524B cover sheet to the Program Office.
- The fax number appears as part of the confirmation notice (sample shown below).

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Thank you!

Your annual performance report for the Upward Bound Math and Science Competition has been received and stored as of 10/17/2005 12:57:38 PM. The printed ED Form 524B should be faxed to (202)555-6565 after the form is signed by the Authorized Representative.

PLEASE PRINT OR SAVE THIS CONFIRMATION FOR YOUR RECORDS

To Print your 524B and this confirmation message, click 'Print' button.

Print  Request Complete Package in PDF

We value your opinion. Please take a few minutes and complete the optional e-Grants Survey form
PDF Version of Report

- The Project Director may request a PDF version of the entire report package once it has been submitted.
- The screen shown below will confirm that the request has been received, and an email will be sent once the PDF version has been generated.

Thank you for requesting the submitted application in PDF format. Your request is being processed in the order it was received, and you will be notified via e-mail once it has been completed. The process can take from a couple of minutes to a few hours depending on the size of your application and the number of applications being processed.
Unsubmit the Report

- The user may unsubmit the report at any point up until the submission deadline date.
- Please note that report that has been unsubmitted cannot be resubmitted AFTER the submission deadline.
FY 2008 and Beyond

- Implementation of G5 – Grants Management System Replacement
- Phase 1 – December 2007 - Payments
- Phase 2 – December 2008 – Pre-Award Grant Processing
- Phase 3 – December 2009 – Post Award Grant Processing
  - Includes e-Reports
Online Help

- Help Desk: 8 am-6 pm Monday-Friday
- Help Desk via e-mail at: EDCAPS.USER@ed.gov
- e-Application, e-Reader, e-Reports, e-Administration User Guide
- 9 Steps to Prepare an e-Report
- Links to EDGAR, Other Grants Information, Program Offices, etc

The image displays the Application Support Box listing Technical Support information:
Helpdesk 1-888-336-8930 (TTY 1-866-967-2696, local 202-401-8363) Hours of Operation 8am-6pm Washington DC Time, Monday-Friday.

<table>
<thead>
<tr>
<th>e-Application Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application content or program specific support: See Packages for contact information</td>
</tr>
</tbody>
</table>
Questions????