# eLINK Guidance Document

## Progress Reports

November 2014

> **Purpose**: This document provides basic guidance on how to complete a progress report in eLINK. Progress reporting is a means to illustrate achievements and progress made toward grant program goals and to ensure accountability and transparency in the use of State funds. In general, reports are to contain updates on activities and expenditures that occurred since the previous report. Grant programs may have unique requirements and it is up to the grant recipient to ensure the organization is in compliance with grant agreement and program requirements.

## Completing a Progress Report

Progress reports include entering and updating activity information where progress has been made, and submitting the report through the **Progress Report** function. Progress reports may also require the attachment of additional documentation in support of the reported activities of the grant and/or to support reimbursement requests.

1. The first step in progress reporting is to enter and/or update activity information where progress has been made; including entering new activities, entering expenditures made on activities, providing additional information or details about activity accomplishments, and mapping and entering final estimated indicators as appropriate for completed projects. Activities directly associated with a specific grant can be accessed by finding the grant on the Home page and clicking the workplan activities icon or through the **Workplan Activities** screen under **Track** in the main menu. For instructions on how to create and/or update activity information, see the eLINK Guidance Document: *Managing Activities*.

2. After Activities of the grant have been updated to reflect actions and expenditures since the previous report, click on the grant title in the **Activities & Expenditures** grid, which will bring the user to the **Grant** window. In the **Grant** window, the user selects the progress report tab. Users can also access the progress reporting module from the home page by clicking the progress report icon for the grant.

3. Click **Add New Progress Report**. Enter information in the report. Select from the following options (not all options are available for all grants)

   a. **Interim Report**: interim progress reports can be submitted at any time for all grants to meet reporting requirements.

   b. **Interim Report w/Payment**: for interim progress reports on grants when a reimbursement payment is requested. User's progress report entry should include details of the request, such as a financial report and other attachments to document the payment request.

   c. **Final Progress Report:** for finalized grants with no payment requests or funds to return. In most cases, this should be accompanied by attachment of a financial report. An approved Final Progress Report will become a closed grant, which can no longer be edited.

   d. **Final Report w/Payment**: for finalized grants when a reimbursement payment is requested. User's progress report entry should include details of the request, such as a financial report and other attachments to document the payment request. After the payment is processed by BWSR, the grant becomes closed and can no longer be edited.

e. **Final Report w/Refund**: for finalized grants with funds to return. Selecting this option will require the user to enter the amount of funds to be returned and the check number. A Returned Funds Form can then be printed. (Note that you must save this information before generating the report, or the report that is generated will be blank.) In most cases, this progress report should also be accompanied by attachment of a financial report. After receipt of the refund amount and processing in Grant Agreement Management, the grants becomes closed and can no longer be edited.

4. Click "Save" in order to save the Progress Report. You should see a message indicating the progress report was successfully created.

5. The final step is to change the status of the grant progress report to "Submitted". This is accomplished by selecting "Submitted" from the grant status dropdown list in the upper part of the page and then clicking the "Go" button. Setting the grant status to "Progress Report – Submitted" will generate a PDF of copy of your grant summary report, and send a message to your Board Conservationist that the report is ready for review.

## Stage/Status Definitions for Progress Reports

- **Progress Report - In Process**: active grant that can be edited by grant applicants. Must be submitted to be reviewed.

- **Progress Report – Submitted**: active grant that has had a progress report submitted and is in review at BWSR.

- **Progress Report – Need More Information**: active grant that has had a progress report reviewed and is in need of additional information.

- **Progress Report – Interim Approved:** active grant that has had a progress report submitted, reviewed, and approved.