Performance Reporting

Job Aid Reference Guide

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How to Use this Guide

This Job Aid Reference Guide (JARG) will help users navigate the JustGrants Grant Award Administrator (GAA) functions regarding performance reports (PR) and is part of the training resource library accessible on the JustGrants Training & Resources page.

Linked Content

This JARG utilizes a chapter-linked Table of Contents. A link has been included on each page to help the user quickly return to the Table of Contents.
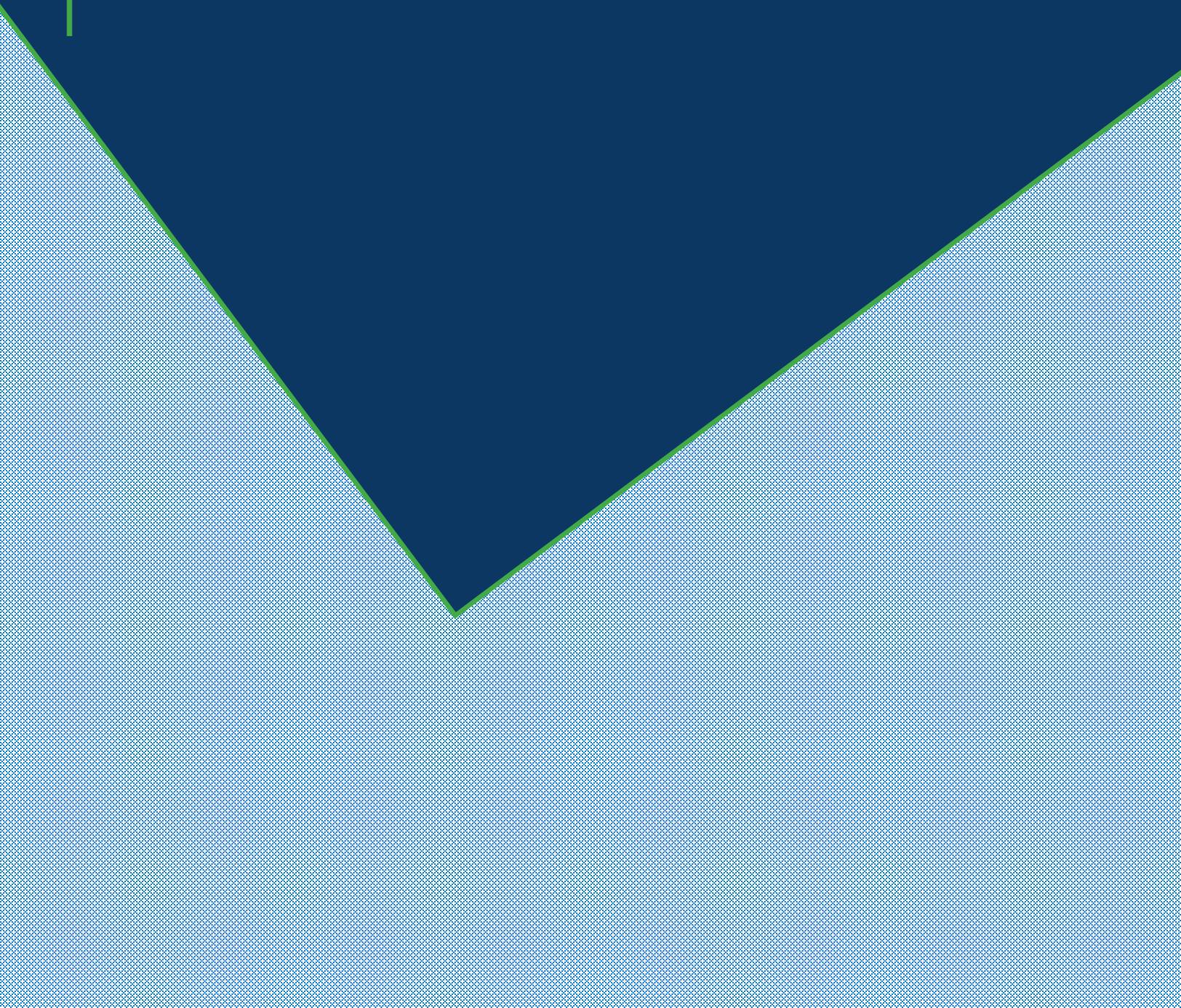
Select the **Home** icon located at the bottom left corner of the page

Overview

Performance Reporting Overview

Performance reporting is integrated into the JustGrants system. Eventually, all users will complete required reporting using a Performance Measure Question Set directly in JustGrants within each Performance Report (PR).

- Delinquent reports may result in a suspension of grant funds. Once the delinquent report is submitted, the suspension is lifted within 24 hours.

- The reporting cadence is determined by the solicitation, based on the program and funder.

- Reports are either **Regular** or **Final.** The Grant Award Administrator (GAA) can mark a report as the final performance report (PR), meaning that all grant activities are complete, funds are obligated, and the award is ending early.

- Final reports are due no later than **120 days** after the end of the award.

- PRs are generated based on frequency; due date is determined by the program with which an award is made.

- PRs generated for an award's last reporting period will automatically be final reports, all others are regular PRs.

Submitting Performance Reports

There are two methods which can be used to submit PRs. Either of the methods can be used to submit performance measures:

- Responding to the Question Set
- Uploading a report generated by an external system

How can the user determine which method is required to submit a performance measure?

Is the award:

- A 2020 award or later

Or

- An award that had Performance measures is the Grants Management System (GMS)

No →

Yes →

Is there a question set associated with the PR?

Yes

No

| Respond to the Question Set | Upload a Report |

For either method, grantees may upload additional files to relay information about project progress.

NOTE: If a PR does not include a question set to fill out, attach documents as directed by the grant manager.

Performance Report Frequency and Due Dates

The following list details the most common reporting frequencies and due dates for Department of Justice (DOJ) award recipients:

REPORTING PERIOD START DATE	REPORTING PERIOD END DATE	REPORT DUE DATE
~ QUARTERLY (OJP) ~		
January 1	March 31	April 30
April 1	June 30	July 30
July 1	September 30	October 30
October 1	December 31	January 30
~ SEMI-ANNUAL REGULAR (OJP and OVW) ~		
January 1	June 30	July 30
July 1	December 31	January 30
~ ANNUAL FISCAL YEAR ~		
October 1	September 30	October 30
~ ANNUAL CALENDAR ~		
January 1	December 31	January 30
~ COPS SEMI-ANNUAL ~		
February 1	July 31	August 31
August 1	January 31	March 2
~ OVW ANNUAL ~		
January 1	December 31	March 30
~ ANNUAL OTHER ~		
Dynamic: Defined at solicitation	Dynamic: Defined at solicitation	Dynamic: Defined at solicitation

Performance Report Notifications

Grant Award Administrators will receive Performance Report-related email notifications and will be able to read email text:

- PR Submission

- PR Approval

- PR Reminders

- Past Due PR Notification

Additionally, Performance Report-related email copies can be reviewed in the PR page correspondence section.

Upload Performance Measurement Data

Upload Performance Measurement Data:
Step 1a

Some grantees report in systems such as the Performance Management Tool. These grantees will notice that the system does not include a Performance Measure Question Set and they will upload narratives or templates as directed by the Grant Manager.

1a) After logging in as a **Grant Award Administrator,** select the appropriate PR to open from *My Worklist.*

NOTE: Use the **Case Status** filter to find PRs in **Pending ChangeRequest** status. The oldest PR must be completed and submitted before others can be submitted.

Upload Performance Measurement Data:
Step 1b

Another method to locate the PR is to open a **Funded Award** in edit mode and navigate to the **Performance Report** tab. Funded Awards are found in the **Awards** menu.

1b) Select **Begin** on the **Programmatic** task line in the **Assignments** section or select **Begin** for the specific RP. If **Begin** does not appear, the award may not be assigned to the current user.

NOTE: **Begin** will always appear if the award is not in edit mode, however, it may not appear if the PR is not assigned to the logged-in user, and therefore is not available for editing.

Upload Performance Measurement Data:
Steps 2 - 3

2) Select the type of report to submit, **Regular** or **Final**.

3) Select the caret next to **Project Description** to expand window and review.

NOTE: Grantees who report in PMT, other secondary systems, or use grant program-specific forms **will not** see a Performance Measure Questions Set but will respond to performance metrics in those secondary systems or forms. A PDF of the data entered and uploaded in the secondary systems will be saved. The grantor agency will provide explicit guidance on what a grantee should include in their PR. Once **Final** is **selected and confirmed**, it is not possible to change the report back to Regular without technical assistance.

NOTE: The GAA can mark a performance report as final – all grant activities are complete, funds are obligated, and the award is ending early.

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4) Type any relevant comments for the **Grant Manager** in the **Comments** field.

5) In the **Attachments** section, select **Upload** to upload the PDF of the PMT, secondary system report, or grant program-specific performance measures form as directed by the grant manager.

NOTE: The **Comment** field should not be used as part of a performance measure narrative or to supplement the performance measures report.

Upload Performance Measurement Data:
Step 6

Upload
Attachments

6) Locate the file to upload from the user's workstation or shared drive.

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Upload Performance Measurement Data:
Steps 7 - 9

7) Update the name of the file by typing a new file name in the **Name** field. This is a required field.

8) The **Category** defaults to **Performance Report**. If the category does not default to Performance Report, use the dropdown menu to change the category to Performance Report.

9) Select **Attach**.

10) Select **Submit** to complete the PR or select **Save** to save and return later.

NOTE: Once submitted, the report is routed to the **Grant Manager** for review.

Submit Performance Report with Question Set

Submit PR with Question Set:
Step 1a

Grantees working on a PR that originated in JustGrants will complete a Performance Measure Question Set.

1a) After logging in as the GAA, select the performance report from **My Worklist.**

NOTE: Use the case filter from the case status field to locate the PR.

Submit PR with Question Set:
Step 1b

Another method to locate the performance report is to open a **Funded Award** in edit mode and navigate to the Performance Report tab. Funded Awards are found in the **Awards** menu.

1b) Select **Begin** on the **Programmatic** task line in the **Assignments** section or **Begin** for the specific PR. If **Begin** does not appear, the award may not be assigned to the current user.

NOTE: The oldest report must be completed and submitted before others can be submitted.

Submit PR with Question Set:
Steps 2 - 4

2) Select the type of report (**Regular** or **Final**) to submit. Performance reports generated in the last award reporting period will automatically be Final reports, all others are Regular.

3) Select the link for the appropriate question set to answer relevant questions.

4) Select the caret next to **Project Description** to expand window and review.

NOTE: PRs are generated based on frequency and due dates as determined in the solicitation. The grantor will provide guidance on what grantee should include in the performance report. **Once Final is selected and confirmed, it is not possible to change back to Regular without technical assistance.**

Open Question Set

5) Select **Begin**. Begin allows for editing **Question Set** entries.

NOTE: The PR is displayed in read-only mode. It is possible to print the questions by selecting **Actions** and then selecting the **Print** option. Changes cannot be made to the question set while it is in read-only mode.

6) Answer the questions on the page.

7) Select **Continue** to move to the next page or select **Save** and come back later.

NOTE: Questions vary among awards; those with a red asterisk must be answered. The question set cannot be submitted unless the required questions are answered. Many questions include validations, while some answers generate additional questions to be answered.

Finish Question Set

8)   On the last page of the PR, **Continue** is replaced with **Finish**. Select **Finish** when the questions set is completed or select **Save** and come back later.

NOTE: Selecting **Finish** does not submit the PR. Additional steps are needed before the PR can be submitted.

Submit PR with Question Set:
Step 9

9) Select **Actions** in the upper right corner, then select **Close** to navigate back to the performance report for submission.

NOTE: The grantee can print a hard copy of the question set by selecting the **Print** option from the **Actions** dropdown menu. Print provides a view of the questions and answers. Although printing the document is not necessary, it can be useful for review.

10) When the PR screen opens, the question set status shows as **Resolved-Completed.** (If there are no comments to make or documents to upload, skip to step 18.)

11) To edit the question set, select **Re-Open**. Click **Begin** to edit the question set.

NOTE: If the **Resolved-Completed** status is not displayed, open the **Actions** menu and select the **Refresh** option.

Upload Attachments

12) Type any relevant comments in the **Comments** field.

13) In the **Attachments** section, select **Upload** to upload additional documents as directed by the Grant Manager.

NOTE: Do not use the **Comment** field as part of a performance measure narrative or to answer items in the question set. Comments and attachments are visible to the Grant Manager.

14) Locate the file to upload from the user's workstation or shared drive.

15) Update the file name by typing a new name in the **Name** field. This is a required field.

16) The **Category** defaults to Performance Report. This should not be changed for a performance measures data attachment.

17) Select **Attach.**

Select Submit

18) Select **Submit** to complete the PR or select **Save** to save and return later.

NOTE: Once submitted, the PR is routed to the Grant Manager for review.

19) If the report type is final, this confirmation page will appear after selecting submit. Read the disclosure and select **Confirm**.

NOTE: Selecting **Cancel** returns the PR to the GAA, thereby allowing the GAA to make any changes to the PR before submitting.

20) Select **Audit** to view an up-to-date history of the actions taken on the PR.

NOTE: The status bar at the top of the page has changed to **Pending Review** and a notice is displayed that reads: "Thank you! This case has been routed for approval." The Grant Award Administrator will also receive an email confirming the PR was submitted.

Submit PR with Question Set:
Audit History

The **Audit** page displays an up-to-date historical description of all actions taken on the PR. Notice that the audit indicates the Performance Report was sent to the Grant Manager Reviewer for approval or rejection.

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Change-Requested Performance Report

Change-Requested Performance Report:

Step 1a

The Grant Manager may return a PR to a GAA directing edits to be made and resubmit the PR. This process is called Change Request. GAAs should respond to change requests within 15 calendar days.

1a) After logging in as a **Grant Award Administrator** select the PR from **My Worklist.**

NOTE: Use the **Case Status** filter to find PRs in **Pending ChangeRequest** status. The oldest PR must be completed and submitted before others can be submitted.

Change-Requested Performance Report:
Step 1b

Another method to locate the performance report is to open a **Funded Award** in edit mode and navigate to the **Performance Report** tab. Funded Awards are found in the **Awards** menu.

1b) Select **Begin** on the **Programmatic** task line in the **Assignments** section or select **Begin** for the specific PR. If **Begin** does not appear, the award may not be assigned to the current user.

Change-Requested Performance Report:
Step 2

2) An email is sent to the GAA's email of record when the Grant Manager initiates a change request. A copy of the system-generated email is attached and located under the **Correspondence** section. Select the **email** link to view the message. The email will open as a pop-up. Close the pop-up window to return to the Performance Report screen.

NOTE: Emails from the Grant Manager go to the GAA as well as to the Alternate GAA, if one is assigned to the award. The email subject line will reflect the action needed to be taken.

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Change-Requested Performance Report:
Step 3

3) Review the Grant Management Comments for guidance from your grant manager about the required edits to your performance report. This may include direction to correct:

- Type of Report (Final or Regular) - See step #4

- Update responses to Question Sets - See Step #5

- Add/delete attachments to comply with program reporting requirements – See Step #15

NOTE: The GAA (Alternate GAA) should edit and resubmit the PR within 15 calendar days of receipt.

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4) Select the type of report (**Regular** or **Final**) to submit. PRs generated in the last reporting period on the award will automatically be **Final** reports, all others are **Regular reports**.

5) Select the link for the appropriate **Question Set** to answer relevant questions.

NOTE: PRs are generated based on frequency and due dates as determined in the solicitation. The grantor will provide guidance on what the grantee should include in the PR. Once **Final** is **selected and confirmed**, it is not possible to change back to **Regular** without technical assistance.

NOTE: The Grant Award Administrator can mark a report as final – all grant activities are complete, funds are obligated, and the award is ending early.

6)   Select **Begin.**

NOTE: The PR is displayed in read-only mode. It is possible to print the questions by selecting the **Actions** button and then selecting **Print.** Changes cannot be made to the question set while it is in read-only mode.

Change-Requested Performance Report:
Steps 7 - 8

7) Answer all the questions on the screen.

8) Select **Continue** to move to the next page or select **Save** and come back later.

NOTE: Questions vary among awards; those with a red asterisk must be answered. The question set cannot be submitted unless the required questions are answered. Many questions include validations, while some answers generate additional questions to be an answered.

Finish Question Set

9) After answering all the required questions, select **Finish** to complete the question set or select **Save** and come back later.

Change-Requested Performance Report:
Step 10

10) Select **Actions**, then select **Close** to navigate back to the PR.

NOTE: A copy of the questions can be printed by selecting **Print** from the **Actions** menu.

Refresh
Performance
Report

11) Select **Actions,** then select **Refresh** to update the PR.

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Re-Open Performance Report

12) When the PR screen opens, the question set status shows as **Resolved-Completed. Submit** is available at the bottom of the PR screen.

13) To edit the question set, select **Re-Open**. Click **Begin** to edit the question set.

Change-Requested Performance Report:
Step 14

14) Type any relevant comments in the **Comments** field. Comments are optional.

NOTE: Do not use the **Comment** field as part of a performance measure narrative or to answer items in the question set. Comments and attachments are visible to the Grant Manager.

Change-Requested Performance Report:
Step 15

15) In the **Attachments** section, select **Upload** to attach additional documents as directed by the Grant Manager.

16) Locate the file to upload from the user's workstation or shared drive.

17) Update the file name by typing a new name in the **Name** field. This is a required field.

18) The **Category** defaults to PR. This should not be changed for a performance measures data attachment.

19) Select **Attach**.

20) The uploaded attachment is displayed. Use the **trash can** icon to remove the uploaded attachment.

21) When finished completing all updates to the PR, select **Submit** to complete the PR or select **Save** to save and return later.

NOTE: Once submitted, the report is routed to the Grant Manager for review.

22) If the report type is final, this confirmation page will appear after selecting submit. Read the disclosure and select **Confirm**.

NOTE: Selecting **Cancel** returns the PR to the GAA.

Change-Requested Performance Report:
Step 23

23) The PR Status Bar at the top of the page shows the status has changed to **Pending Review.**

Change-Requested Performance Report:
Step 24

24) The **Audit** page displays an up-to-date historical description of all actions taken on the PR. Notice that the audit indicates the PR was sent to the Grant Manager Reviewer for approval or rejection.

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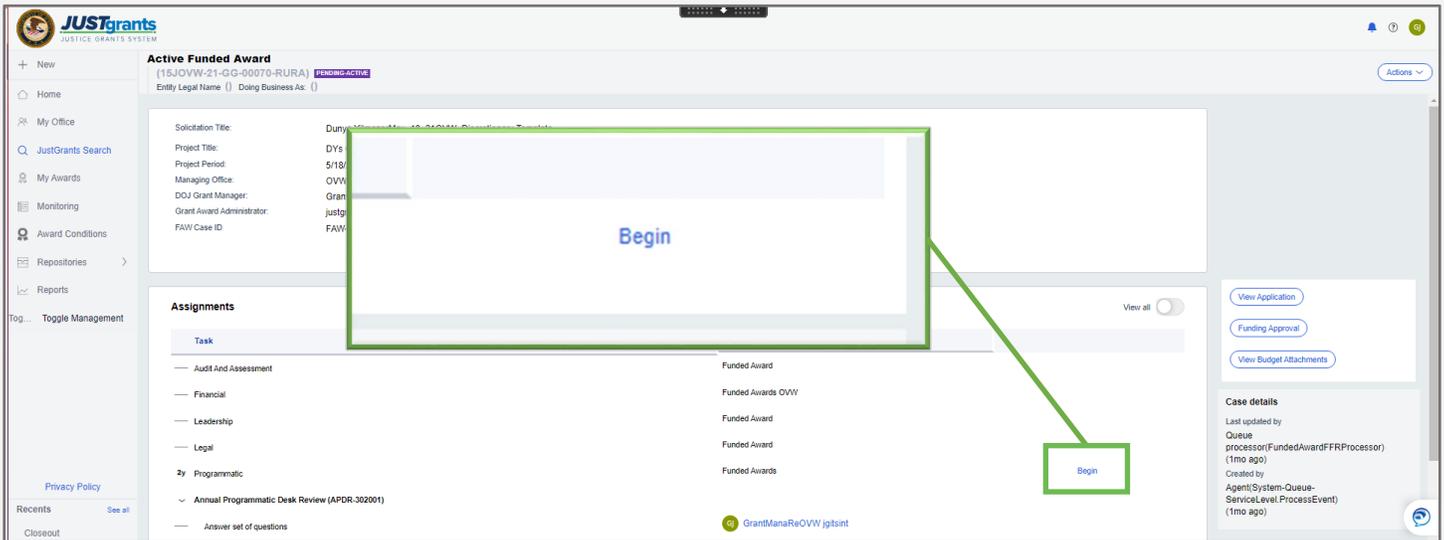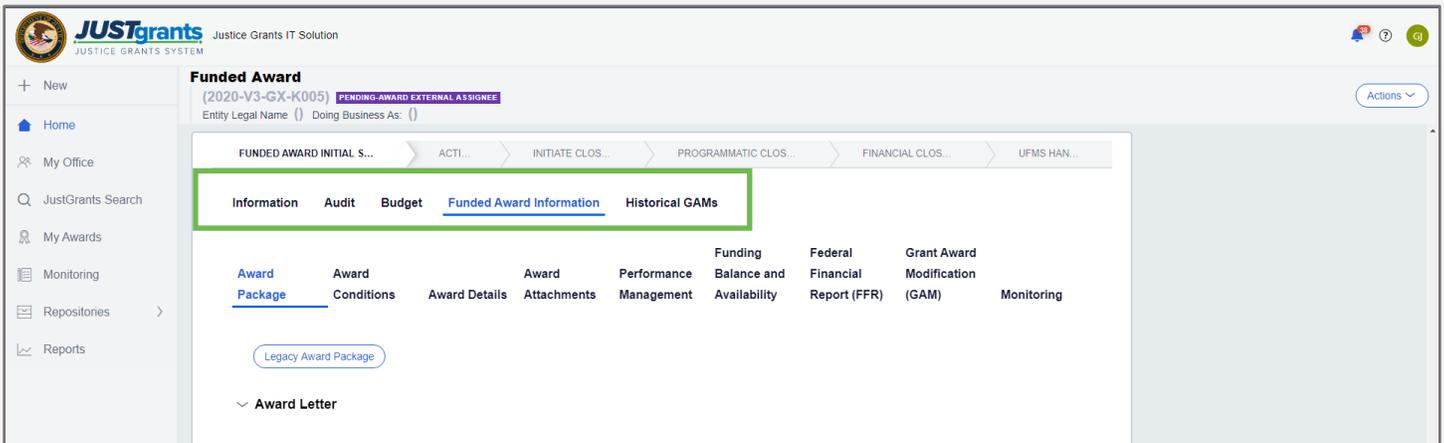# Performance Report Troubleshooting

Performance Report Troubleshooting:
Open Award In Edit Mode

1) To open an award in edit mode, select **Begin** on the **Assignments** screen after selecting the award from the **Awards** menu.

2) If **Begin** does not appear when opening an award, the award may be in read-only mode (cannot be edited). Another indicator that the award is opening in read-only mode is if the Funded Award Labels appear at the top of the screen.

Performance Report Troubleshooting:
Delinquent PR with Resolved-Completed Question Set

1) The PR shows as **Delinquent**, but the Question Set shows **Resolved-Completed**.

2) Ensure the GAA selected **Submit** on the PR after having completed the Question Set. Navigate to the PR from **My Worklist** or from the **FAW**, open the PR and select **Submit** in the lower right corner.

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