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Introduction and Overview

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). All training resources can be accessed 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 to return to the Table of Contents.



Performance Reporting Overview

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

- Delinquent reports may result in a suspension of grant funds. Once the delinquent report is submitted, the suspension will be lifted within 24 hours.
- The reporting cadence is determined by the solicitation and is based on the program and funder.
- Reports are either Regular or Final. The Grant Award Administrator (GAA) can mark a report as the final PR, signifying 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. The due date is determined by the program's award.
- 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 method 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?

For either method, recipients may upload additional files to relay information about the project's progress.

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



Performance Report Frequency and Due Dates

The following list describes 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	

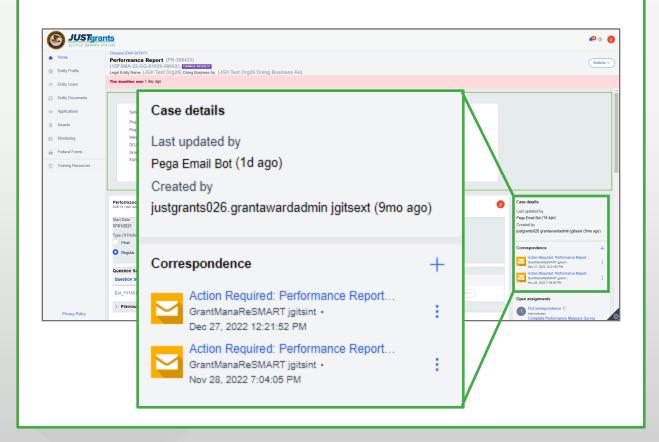


Performance Report Notifications

Grant Award Administrators (GAAs) will receive PR-related email notifications and will have access to:

- PR Submission
- PR Approval
- PR Reminders
- Past Due PR Notification

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





Upload Performance Measurement Data

Upload Performance Measurement Data Open Part

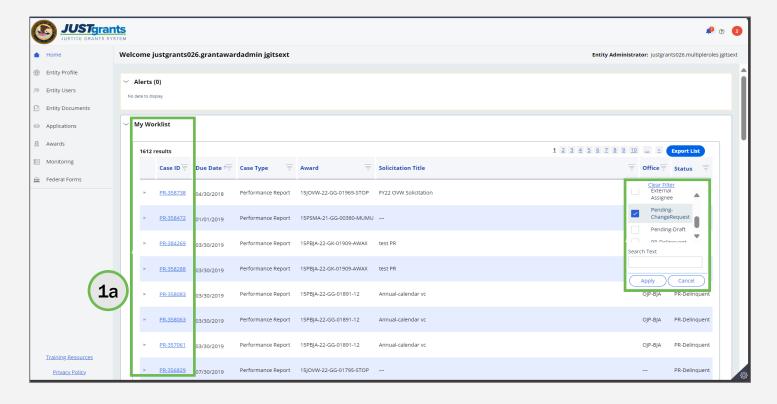
Step 1a

Open Performance Report

Some recipients report using the Performance Management Tool. These recipients will notice that the system does not include a Performance Measure Question Set. 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

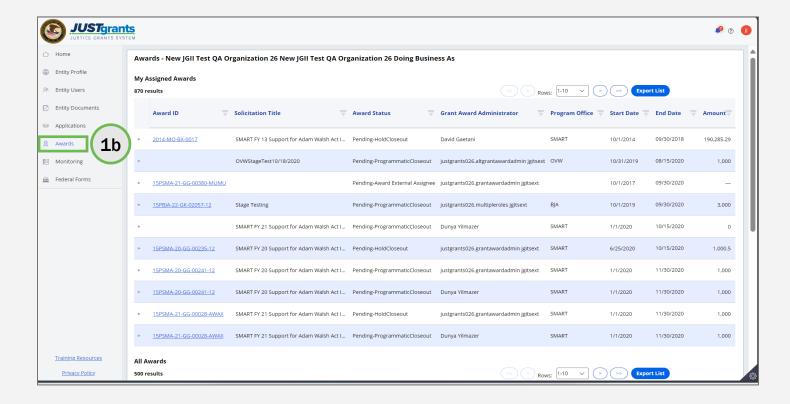
Step 1b

Open Performance Report

Another method used to locate the PR is to open a **Funded Award** (FAW) in edit mode and navigate to the **Performance Report** tab. FAWs 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** is not available, 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 be available if the PR is not assigned to the logged-in user and therefore is not available for editing.





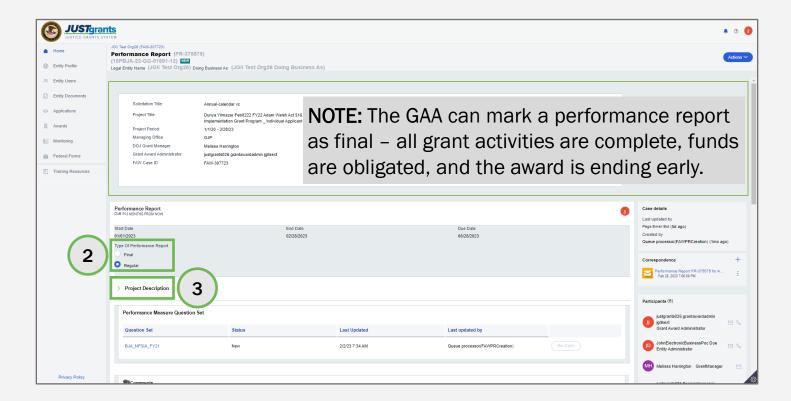
Upload Performance Measurement Data

Steps 2 - 3

Report Type

- 2) Select the type of report to submit, **Regular** or **Final**.
- 3) Select the caret next to **Project Description** to expand the window for review.

NOTE: Recipients who report in Performance Management Tool (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 recipient 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.





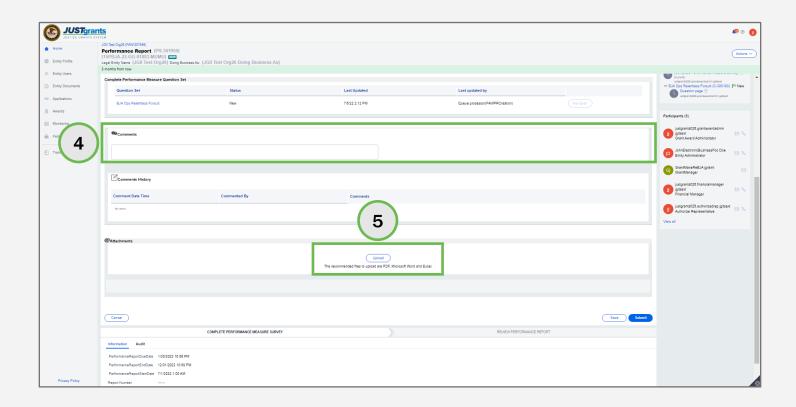
Upload Performance Measurement Data

Steps 4 - 5

Upload Attachments

- 4) Type any relevant comments for the **Grant Manager** in the **Comments** field.
- 5) In the **Attachments** section, select **Upload** to upload a 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.



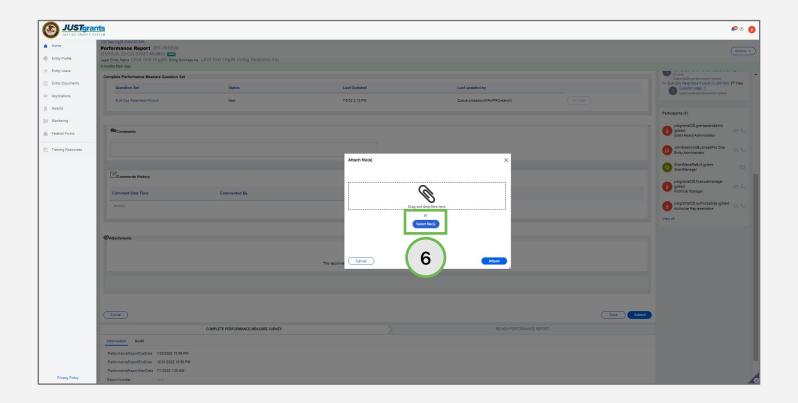


Upload Performance Measurement Data

Step 6

Upload Attachments

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



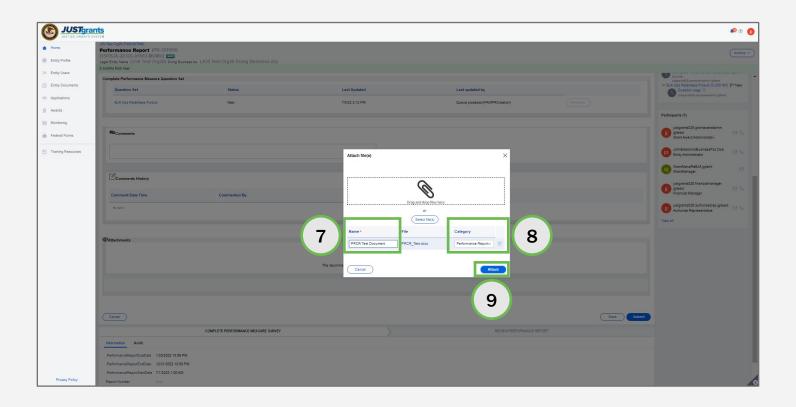


Upload Performance Measurement Data

Steps 7 - 9

Upload Attachments

- 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.





Upload Performance Measurement Data

Step 10

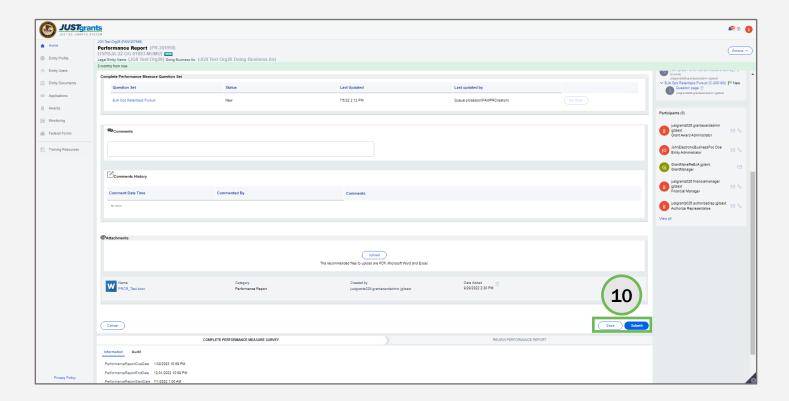
Upload Attachments

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

NOTES:

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

An Office on Violence Against Women (OVW) performance report without an attached survey will receive a validation message indicating the performance report cannot be submitted without the PDF file attached.





Submit Performance Report with Question Set

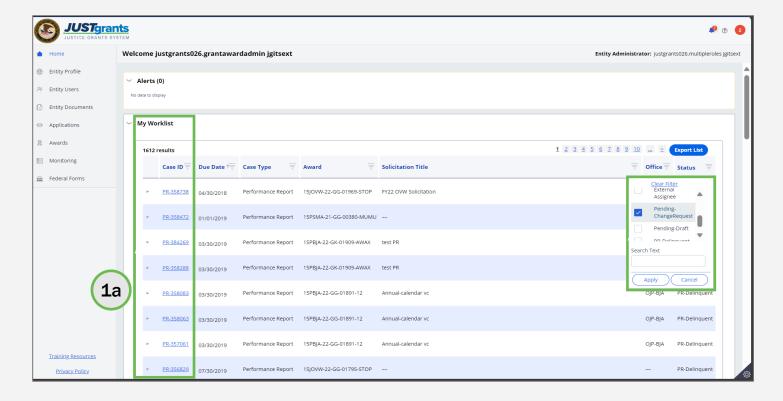
Step 1a

Locate Performance Report

Recipients 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.



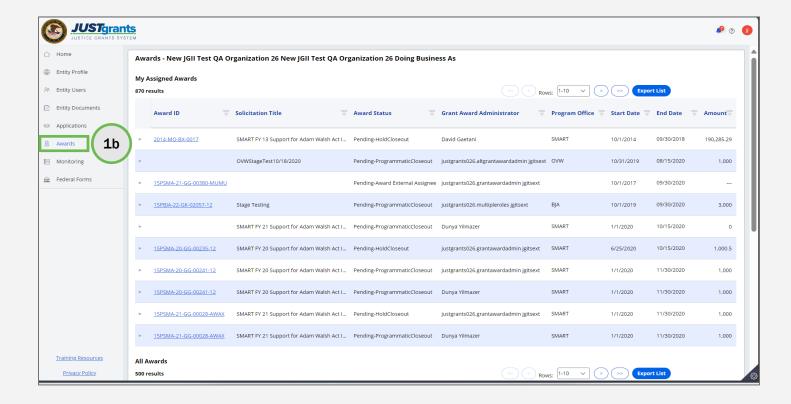


Step 1b

Locate Performance Report

1b) Another method to locate the performance report is to open a FAW in edit mode and navigate to the Performance Report tab. FAWs are found in the Awards menu.

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



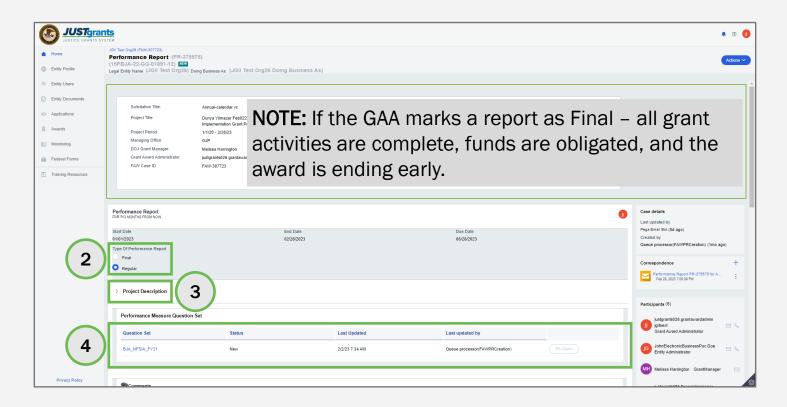


Steps 2 - 4

Select Report Type

- 2) Select the type of report (**Regular** or **Final**) to submit. PRs generated in the last award reporting period will automatically be Final reports, all others are Regular.
- 3) Select the caret next to **Project Description** to expand window and review.
- 4) Select the link for the appropriate question set to answer relevant questions.

NOTE: Once **Final** is selected and confirmed, it is not possible to change back to Regular without technical assistance.





Step 5

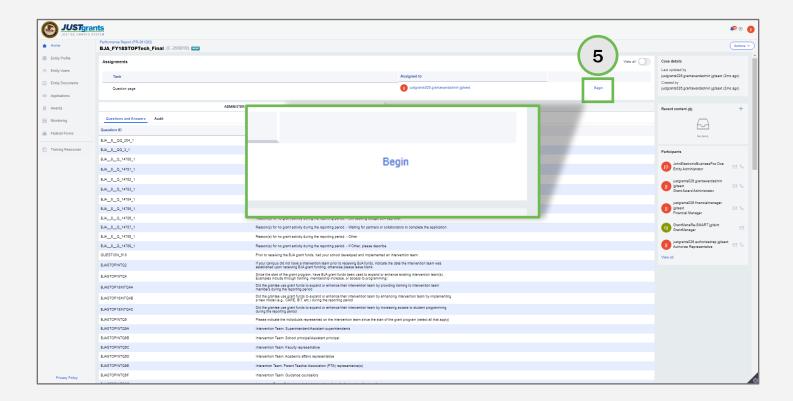
Open Question Set

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

NOTES:

The **Begin** option will only appear for a user that can take action.

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.



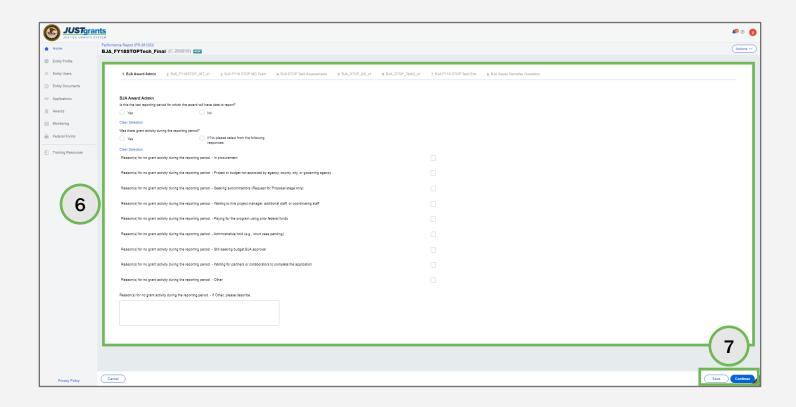


Steps 6 - 7

Answer Questions

- 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.



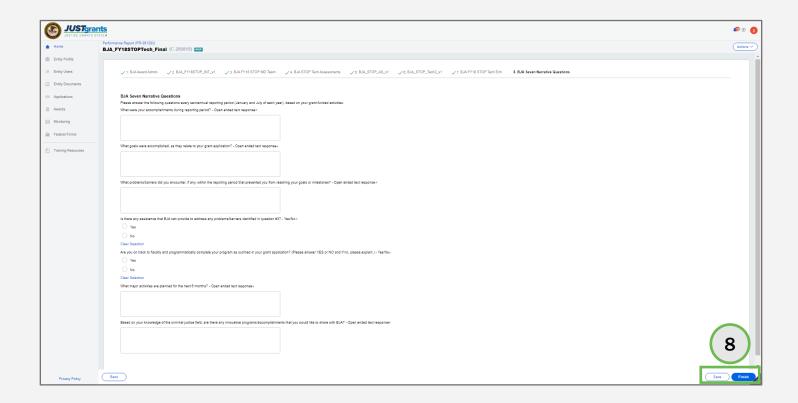


Step 8

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** will return to the PR home screen and does not submit the PR. Additional steps are needed before the PR can be submitted.



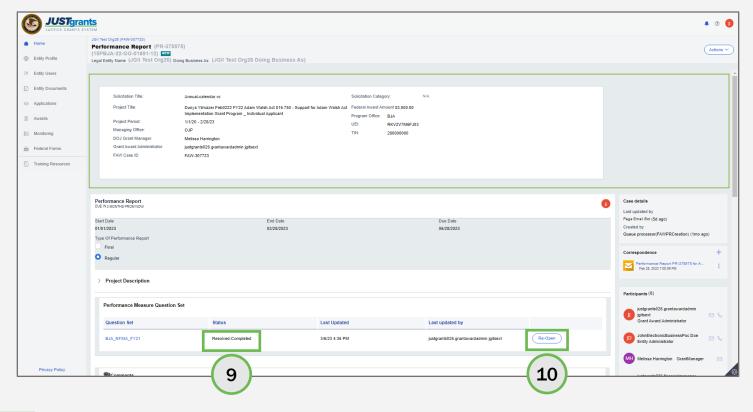


Steps 9 - 10

Re-open Performance Report

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



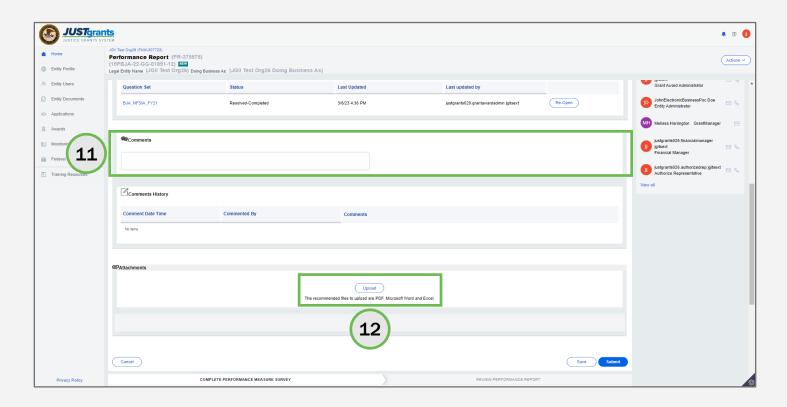


Steps 11 - 12

Upload Attachments

- 11) Enter any relevant comments in the Comments field.
- 12) In the **Attachments** section, select **Upload** to attach 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.

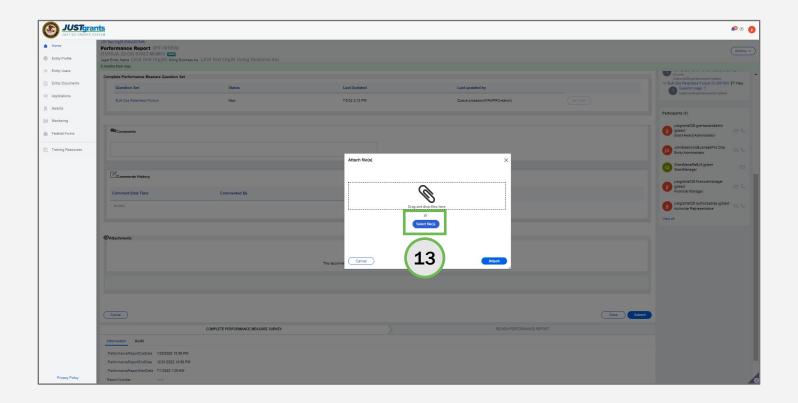




Step 13

Upload Attachments

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

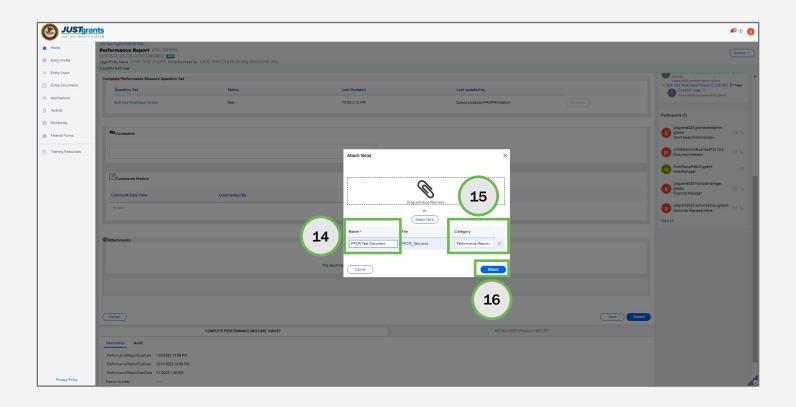




Steps 14 - 16

Upload Attachments

- 14) Update the file name by typing a new name in the **Name** field. This is a required field.
- 15) The **Category** defaults to Performance Report. This should not be changed for a performance measures data attachment.
- 16) Select Attach.



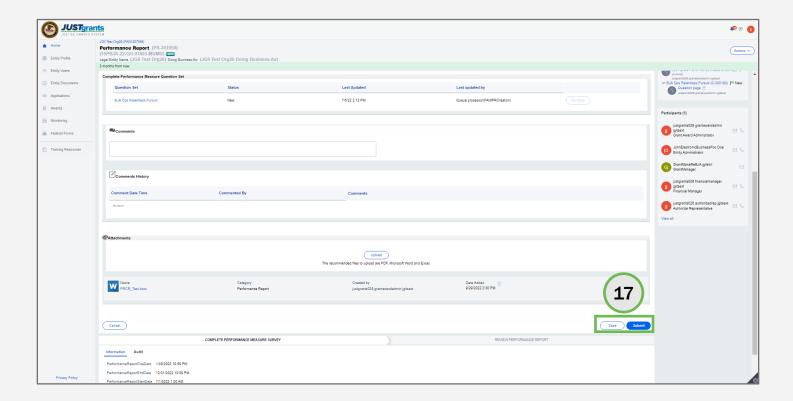


Step 17

Select Submit

17) 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.



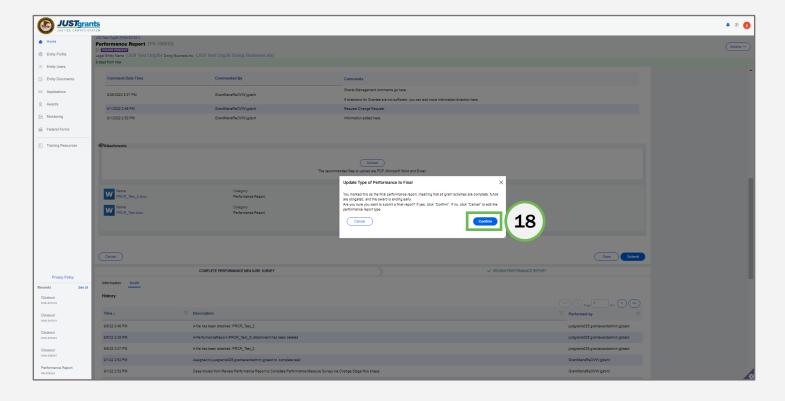


Step 18

Report Type

18) If the report type is final, the confirmation page will appear after selecting submit. Select Confirm.

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

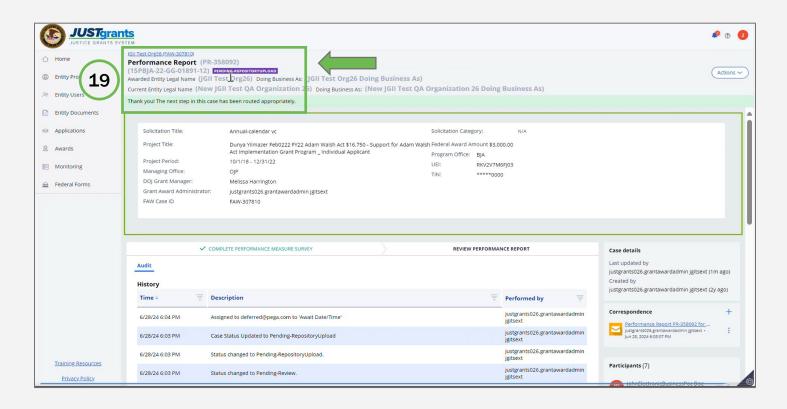




Status

Status

Review the displayed **Status**. The status should be Pending Repository Upload. There is also a notice displayed that reads, "Thank you! The next step in this case has been routed appropriately." The GAA will receive an email confirming that the PR was submitted.

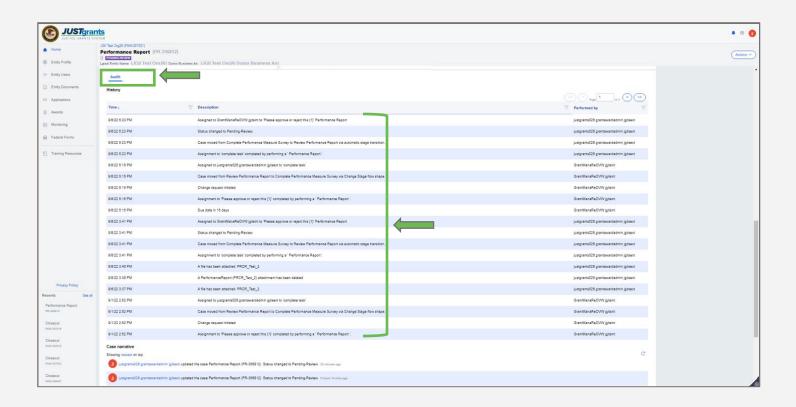




Audit History

Audit History

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





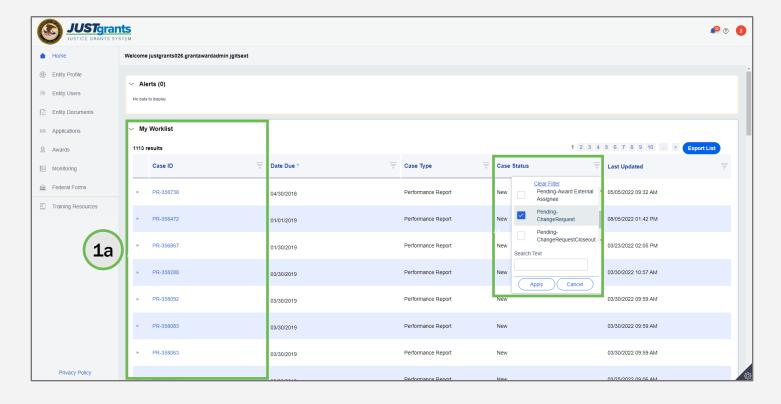
Step 1a

Locate Performance Report

The Grant Manager may return a PR to a GAA who directs edits to be made and resubmits the PR. This process is called a 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.

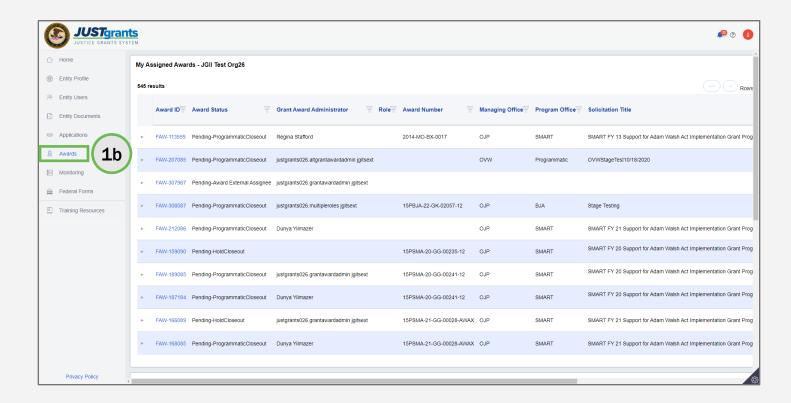




Step 1b

Locate Performance Report

1b) Another method to locate the PR is to open a **Funded Award** in edit mode and navigate to the **Performance Report** tab. FAWs are found in the **Awards** menu.



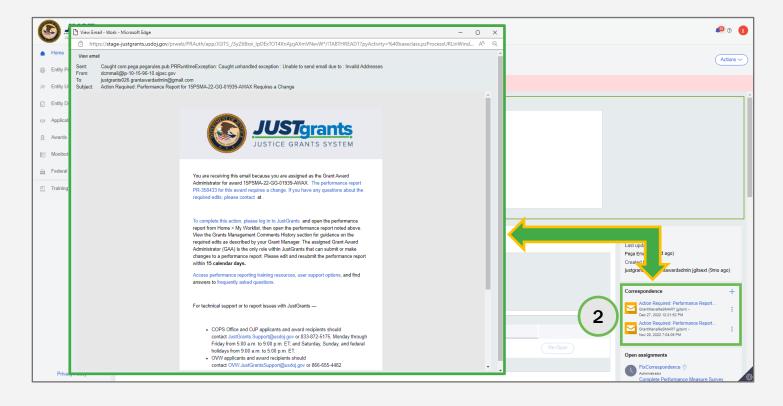


Step 2

Email Correspondence

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 required action.



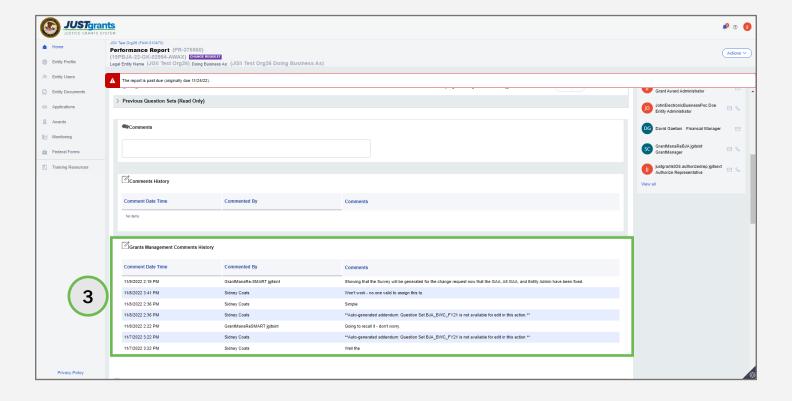


Step 3

Review Grant Manager Comments

- 3) Review the Grant Management comments for guidance from the grant manager about the required edits to the PR. This may include the following required corrections:
 - 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 (or Alternate GAA) should edit and resubmit the PR within 15 calendar days of receipt.





Steps 4 - 5

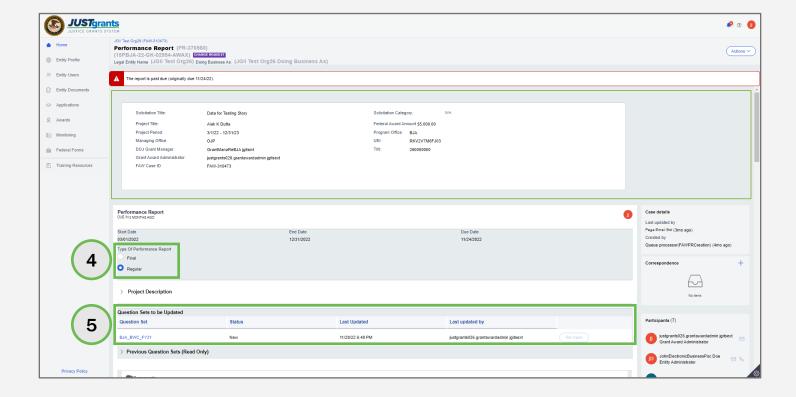
Select Report Type

- 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.

NOTES:

Once Final is selected and confirmed, it is not possible to change back to Regular without technical assistance.

The GAA can mark a report as final which indicates that all grant activities are complete, funds are obligated, and the award is ending early.



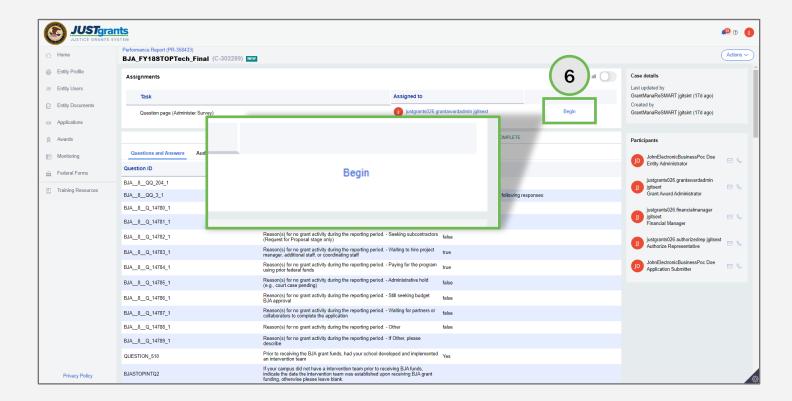


Step 6

Open Question Set

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.



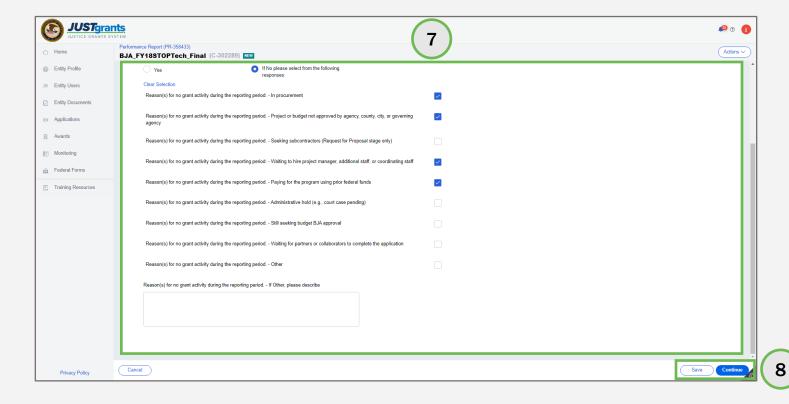


Steps 7 - 8

Answer Questions

- 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; questions 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.

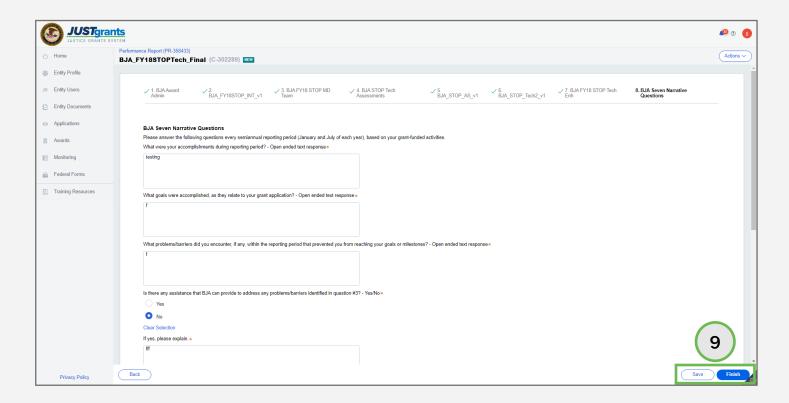




Step 9

Finish Question Set

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

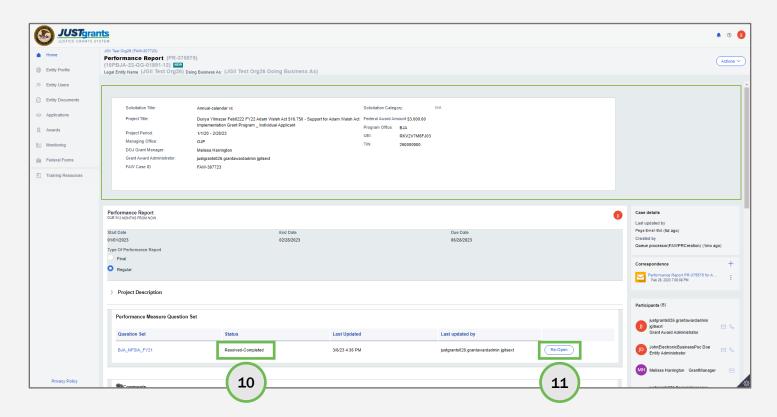




Steps 10 - 11

Re-Open
Performance Report

- 10) When the PR screen opens, the question set status is **Resolved-Completed**; the **Submit** option is available.
- 11) To edit the question set, select **Re-Open**. Click **Begin** to edit the question set.



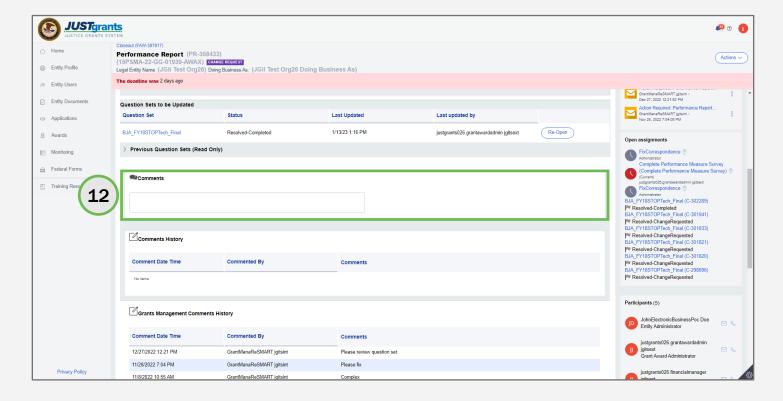


Step 12

Comments

12) Enter 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.

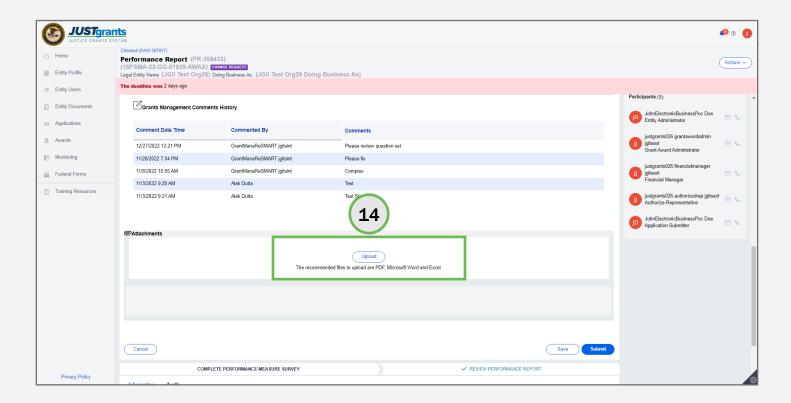




Step 14

Upload Attachments

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

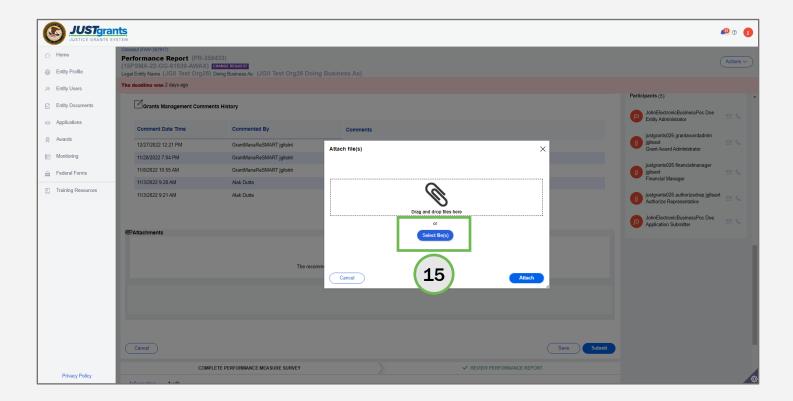




Step 15

Upload Attachments

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

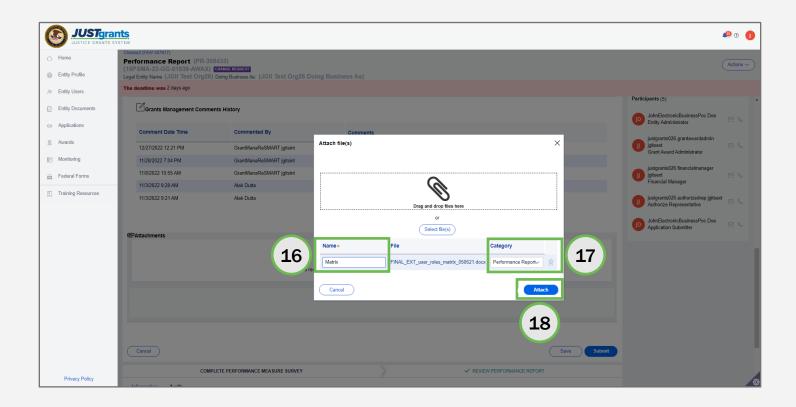




Steps 16 - 18

Upload Attachments

- 16) Update the file name by entering a new name in the **Name** field. This is a required field.
- 17) The **Category** defaults to PR. This should not be changed for a performance measures data attachment.
- 18) Select Attach.



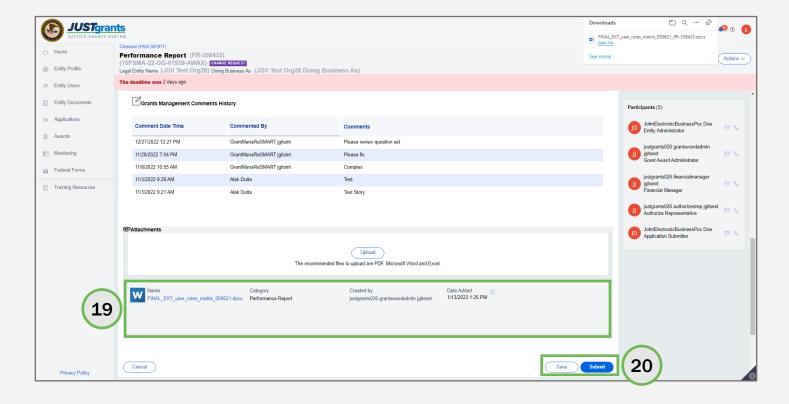


Steps 19 - 20

Submit Performance Report

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



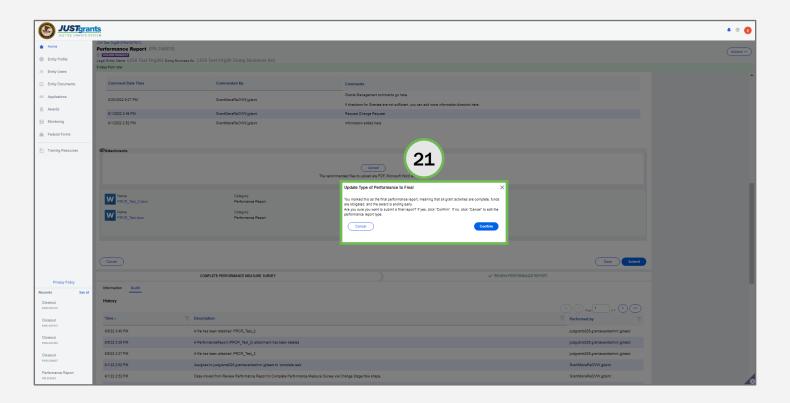


Step 21

Final Performance Report

21) If the report type is final, a confirmation page will be displayed after selecting submit. Select Confirm.

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

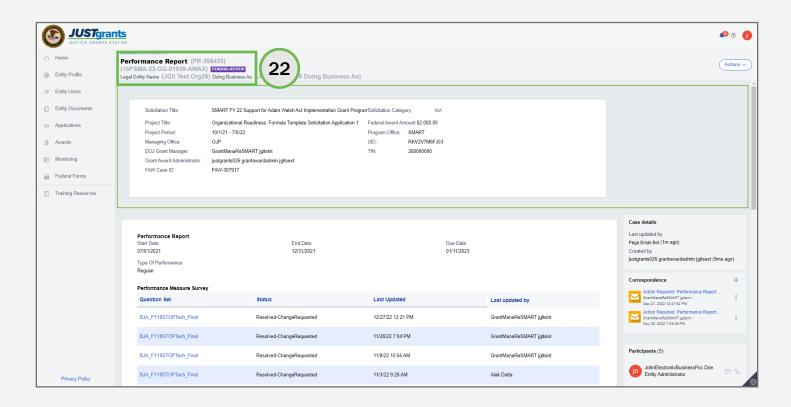




Step 22

Pending Review

22) The PR status has changed to Pending Review.

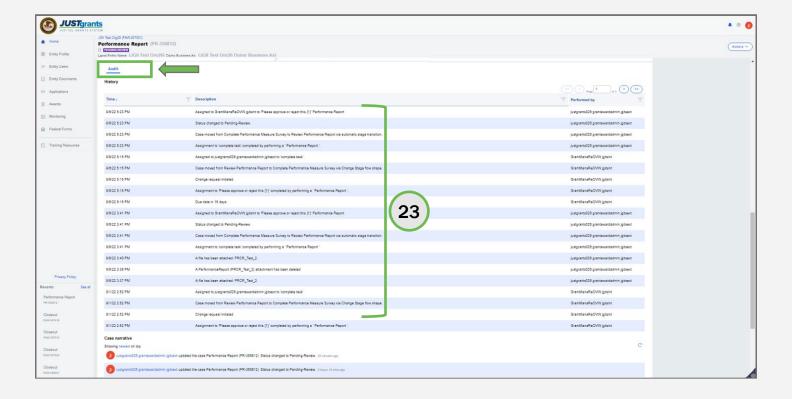




Step 23

Audit Page

23) 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.





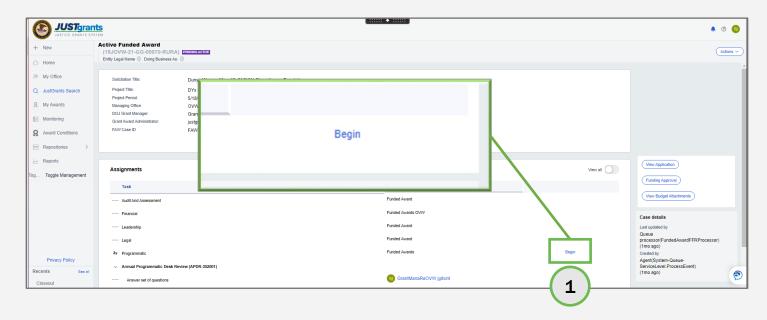
Performance Report Troubleshooting

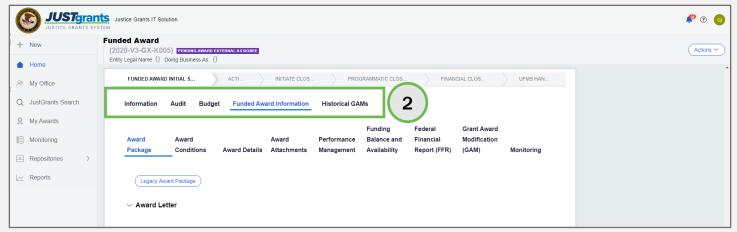
Performance Report Troubleshooting

Open Award In Edit Mode

Troubleshooting

- 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 is displayed.







Performance Report Troubleshooting

Delinquent PR with Resolved-Completed Question Set

Troubleshooting

If the PR shows as **Delinquent**, but the Question Set shows **Resolved-Completed**, 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**.

