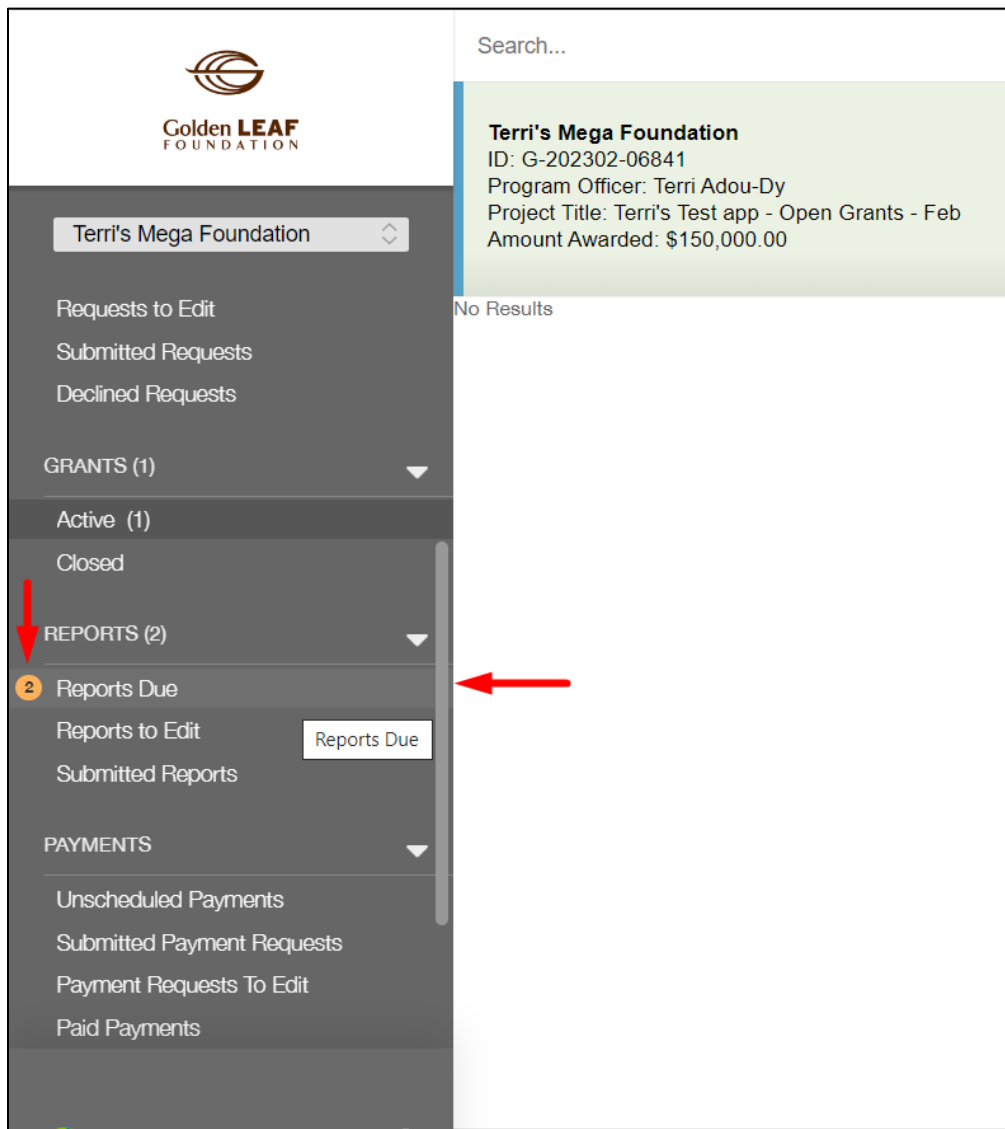


Objectives:

- To learn how navigate the menu to find reports and their status
- To learn how to complete and submit a report

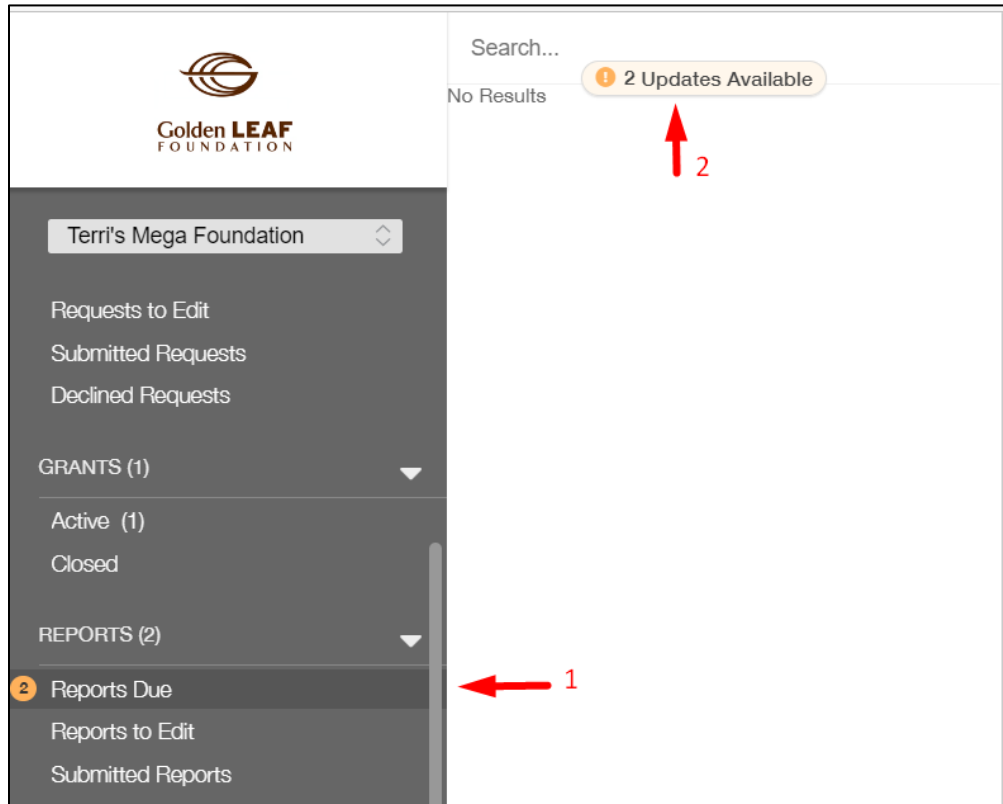
Locating reports due

- 1) When you log in to your grant portal account (see quick reference sheet, **How to Log In**, [here](#)), scroll down the menu to the **REPORTS** section. If there are orange indicators to the right, that means update have been made. In the example below, two updates have been made to **Reports Due**.

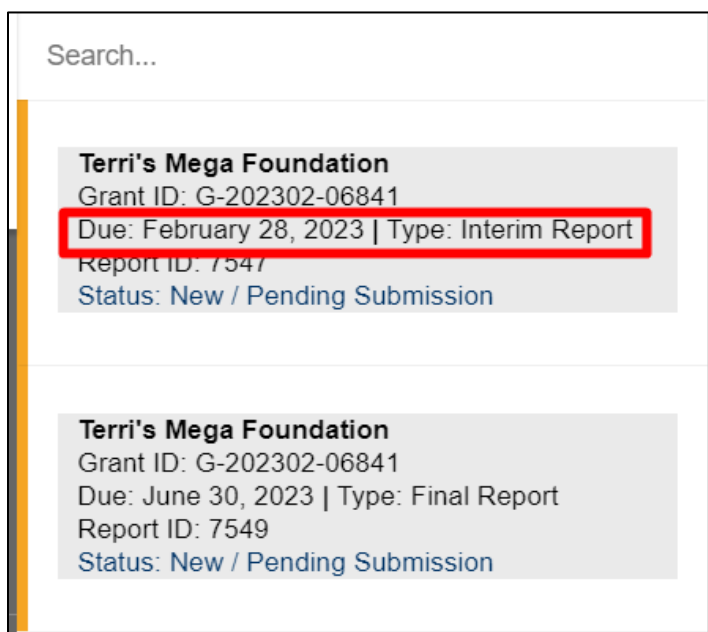


REPORTS (for grantees)

- 2) Click **Reports Due** then click the update bar indicating, in this example, **2 Updates Available**.



- 3) The reports that are due now show to the right of the menu. In this example, there is an interim report due February 28, 2023, and a final report due June 30, 2023.



REPORTS (for grantees)

- 4) Click the desired report, and it will open (to the right) for viewing. As indicated by the arrows in the image below, note the blue and gold bars at the edge of each report. **Blue** indicates the report is being viewed. **Gold** means the item has been updated but not viewed.

Click **Edit**, at the upper right corner, to open your report.

The screenshot shows the Golden LEAF Foundation dashboard. On the left is a navigation menu with categories like 'Requests to Edit', 'GRANTS (1)', and 'REPORTS (2)'. The 'REPORTS (2)' section is expanded, showing two report entries for 'Terri's Mega Foundation'. The first entry is highlighted with a blue bar, and the second with a gold bar. Red arrows point to these bars. The main content area shows the details for the selected report (Report ID: 7547), including its status ('New / Pending Submission'), due date ('2/28/2023'), and a section for 'Narrative Information' with a 'Purpose of Grant' field.

- 5) If you're an existing or former grantee, this section will not be alien to you. The purpose of the grant is at the top, to remind you of why the GLF board awarded the grant. The fields below are the same fields you currently must complete with information related to the project or organization that is not captured in the outcomes and activities sections that follow.

This close-up screenshot focuses on the 'Narrative Information' section of the report. It shows the 'Purpose of Grant' field with the text: 'This award provides funding to Terri's Mega Foundation for blah...blah...blah.' Below this are two large text input areas. The first is for describing other activities, accomplishments, or impacts, and the second is for lessons learned or best practices. A red arrow points to the 'Purpose of Grant' text.

REPORTS (for grantees)

- 6) The priority outcomes section will show all priority outcomes you've worked with your program officer to finalize and have approved by GLF. Each priority outcome will have the information and fields as shown in the section outlined by red below.

Actual: Report the outcomes achieved for the reporting period, NOT the cumulative number achieved for the project.

Date reported from/to: Report the start and end date covered by the data reported in the "Actual" field above. Sometimes report dates don't sync with dates that data are regularly available (for example, a report date may not coincide with the end of a semester or academic year in a workforce training project). From report to report, from/to dates for each outcome should not overlap.

Grantee assessment of project outcomes to date: Use this section to report outcomes that are not among GLF priority outcomes and to provide your assessment of overall project outcomes to date.

▼ Priority Outcomes

Please enter data for baseline actual, date reported from and date reported to below. The other fields are generated based on your data you inputted into the application section. Then click "Save and Continue" to save data inputted.

New full-time jobs created

Target:	25
Target date:	12/31/2024
Baseline:	2
Baseline date:	1/1/2023
Data source:	Organization's payroll records

Actual

Date reported from

Date reported to

Grantee Assessment of Project Outcomes to Date

For narrative outcomes or outcomes that are not a GLF priority outcomes. Also, provide your overall assessment of outcomes progress to date.

REPORTS (for grantees)

- 7) Continuing down the page, you'll see the section showing activities you've worked with your program officer to finalize and have approved by GLF. In this example, there are two key project activities. Outlined in red below, you'll see the first approved activity and its target date.

Activity X date completed: Leave this field blank until the activity has been completed. Once complete, enter its completion date in the relevant report.

Activity X status: If the activity is not complete, report on its status as described in the help text just above the field. If there has been no activity, state that there has been no activity to date.

▼ Project Activities

Activity 1 Key Activity Areas

Activity 1:	Renovate facility
Activity 1 Target Date:	9/30/2023

Activity 1 Date Completed

Activity 1 Status
Discuss progress made to date, challenges and resolutions, explanations for not meeting target dates, and any other comments.

Activity 2 Key Activity Areas

Activity 2:	Market/fill positions
Activity 2 Target Date:	6/30/2024

Activity 2 Date Completed

Activity 2 Status
Discuss progress made to date, challenges and resolutions, explanations for not meeting target dates, and any other comments.

REPORTS (for grantees)


- 8) Upload report documents. At this stage, the only required document to submit is the financial report workbook. See [Uploading documents](#).

▼ Documents

Please attach any/all relevant documents to the below "Report Attachments" section.

Invoice copies	+
Evidence of payments made	+
Financial report workbook	+
Supporting documents for outcomes	+
Supporting documents for activities	+
Supporting documents for expenditures	+
Other (photos, approved minutes, etc.)	+

Report Attachments +

- 9) Once you select and upload an itemized document, it will disappear from the list. To upload additional documents, when no option is available in the list, simply click the  in the Report Attachments bar and follow the same process.


Click **Save and Close**.

▼ Documents

Please attach any/all relevant documents to the below "Report Attachments" section.

Invoice copies	+
Evidence of payments made	+
Supporting documents for outcomes	+
Supporting documents for activities	+
Supporting documents for expenditures	+
Other (photos, approved minutes, etc.)	+

Report Attachments +

 test workbook 1.xlsx + -

Financial report workbook

Added by Gran Tee at 10:05 AM on February 2, 2023

Cancel ABC Save **Save and Close**

REPORTS (for grantees)

10) Click **Submit** at the bottom right corner of your screen, then click **OK**.

The screenshot shows the Golden LEAF Foundation report submission interface. The left sidebar contains navigation options: 'REPORTS (2)', 'PAYMENTS', and 'AMENDMENTS'. The main content area displays details for 'Terri's Mega Foundation' reports, including Grant ID, Due Date, and Status. A 'Submit' button is highlighted with a red arrow at the bottom right.

The screenshot shows a 'Submit' confirmation dialog box. The dialog box contains the text: "You are about to Submit this Reports form. Please confirm that you would like to proceed." and buttons for "Cancel" and "OK". A red arrow points to the "OK" button.

11) You should receive an automated e-mail notifying you that your report has been submitted. You can also check the status of your report in the grant portal. You'll see an update dot beside **Submitted Reports** in the menu.

The screenshot shows the 'REPORTS (2)' menu in the Golden LEAF Foundation portal. The menu items are 'Reports Due (1)', 'Reports to Edit', and 'Submitted Reports'. A red arrow points to 'Submitted Reports', which has a small orange dot next to it.

REPORTS (for grantees)

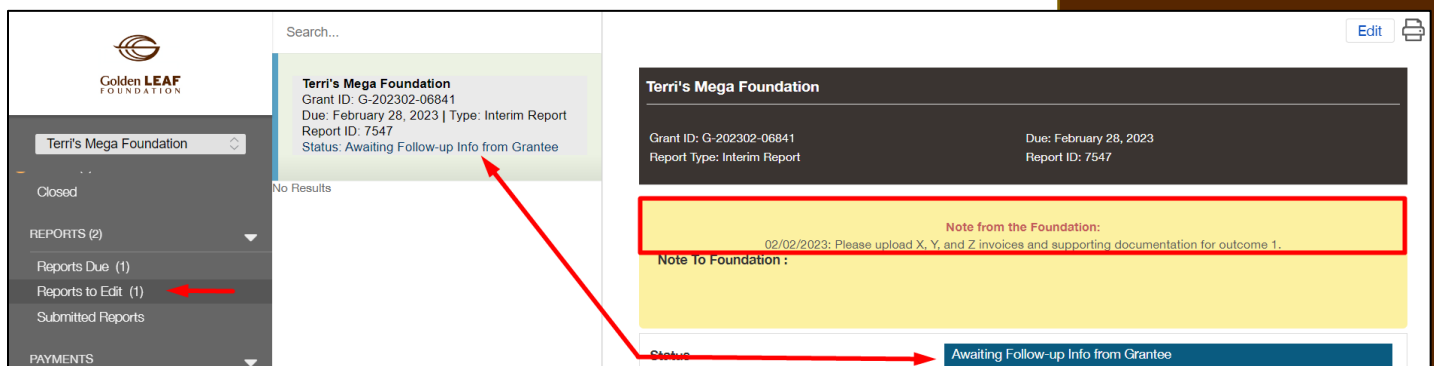
12) Click **Submitted Reports**, then click the update bar to refresh your list. You can then view your submitted reports. Note that you no longer have an edit button at the upper right corner of your screen. That is because your report is now in “Report Submitted” status.



13) When your program officer has determined that s/he has the basic information needed to begin review of your report, you'll receive an e-mail notification that the report has been received. The status bar will change to reflect that. You'll use the same process as in step 12.

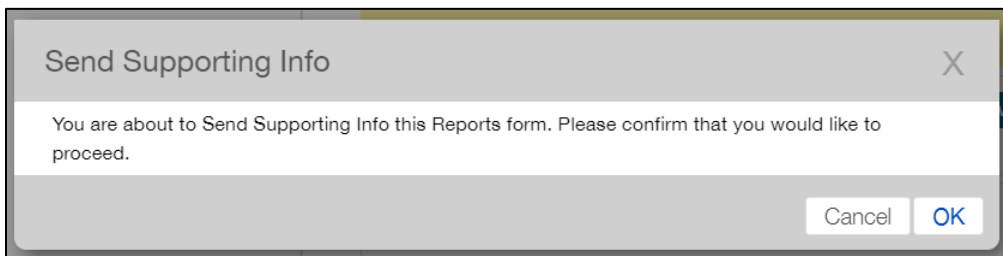
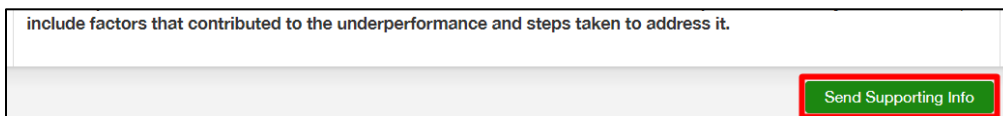
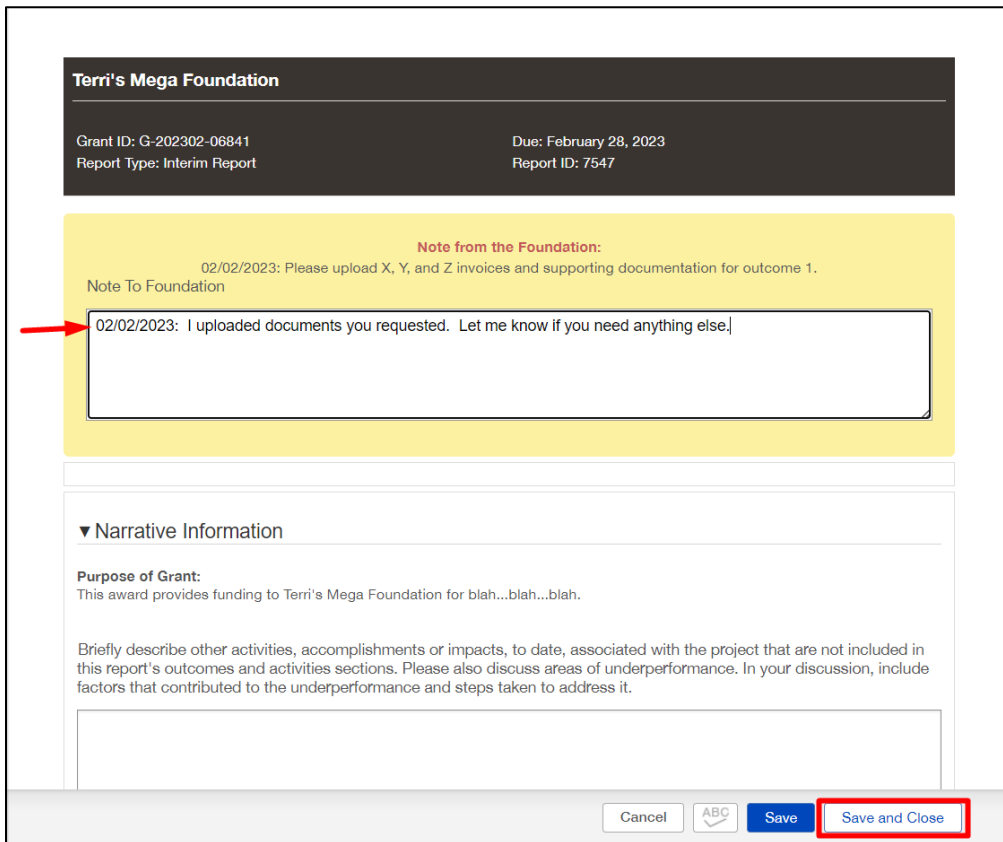


14) Should your program officer require additional information or documents, you'll receive an e-mail notification. When you log in, the report will now be found in **Reports to Edit**. Repeat the process previously described to click **Reports to Edit**, click the update bar to view, and select the returned report. Click **Edit** to open it. Because the ball is in your court, you have edit access to make the required updates. You'll see the note from GLF and status change to “Awaiting follow-up from grantee”.



REPORTS (for grantees)

- 15) Upload the required documents (at the bottom, see [Uploading documents](#)), make any comments back to your program officer in the **Notes to Foundation** field (surrounded by yellow at the top), click **Save and Close**, **Send Supporting Info**, and finally, **OK**.



REPORTS (for grantees)

16) In the “Submitted Reports” section of the grant portal, you can follow the status of your report. Even if you’re not in the system, you’ll receive e-mail notification of its status, until...

The screenshot displays two panels for 'Terri's Mega Foundation'. The left panel shows report details: Grant ID: G-202302-06841, Due: February 28, 2023 | Type: Interim Report, Report ID: 7547, Status: Received. Below this, it says 'No Results'. The right panel is a larger view of the same report, showing Grant ID: G-202302-06841, Report Type: Interim Report, Due: February 28, 2023, and Report ID: 7547. At the bottom, a 'Status' bar shows 'Received' with a red arrow pointing to it.

CONGRATULATIONS! It's approved!

The screenshot displays two panels for 'Terri's Mega Foundation'. The left panel shows report details: Grant ID: G-202302-06841, Due: February 28, 2023 | Type: Interim Report, Report ID: 7547, Status: Approved. The right panel is a larger view of the same report, showing Grant ID: G-202302-06841, Report Type: Interim Report, Due: February 28, 2023, and Report ID: 7547. At the bottom, a 'Status' bar shows 'Approved'.

At this point, the approved report will remain in your “Submitted Reports” folder, in view-only status. Note also that previously submitted documents can't be modified or removed. They can only be previewed.

The screenshot shows the 'Report Attachments' section with three items:

- Test pdf 1.pdf**: Supporting documents for outcomes. Added by Gran Tee at 10:53 AM on February 2, 2023. A red arrow points to a magnifying glass icon, and a 'Preview Document' tooltip is visible.
- Test pdf 1.pdf**: Invoice copies. Added by Gran Tee at 10:53 AM on February 2, 2023. A red arrow points to a magnifying glass icon.
- test workbook 1.xlsx**: Financial report workbook. Added by Gran Tee at 10:05 AM on February 2, 2023. A red arrow points to a magnifying glass icon.

Still have questions? Send your question(s) to grantportalhelp@goldenleaf.org or drop by virtual office hours (schedule posted [here](#)).

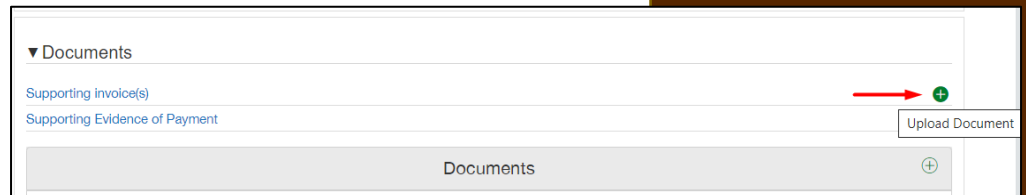
REPORTS (for grantees)

Uploading Documents

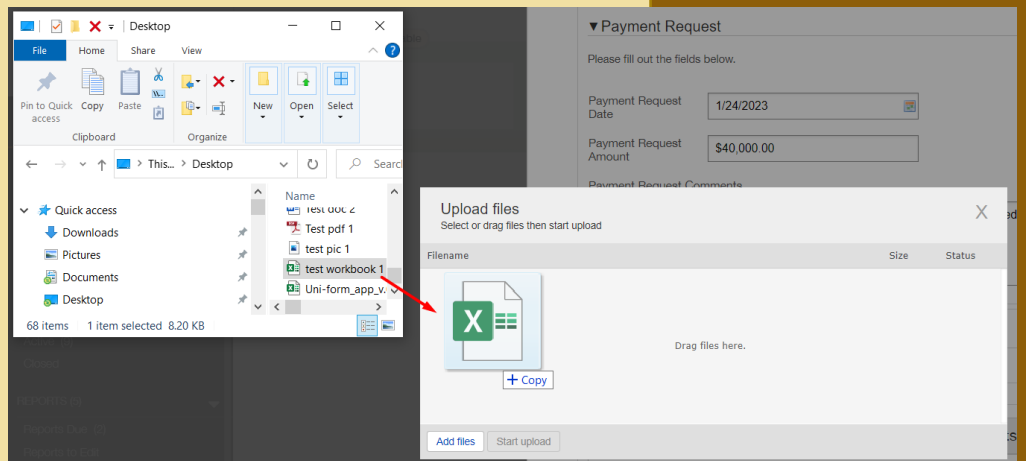
You may upload documents to the portal in two ways:

- Drag and drop, or
- Select a file.

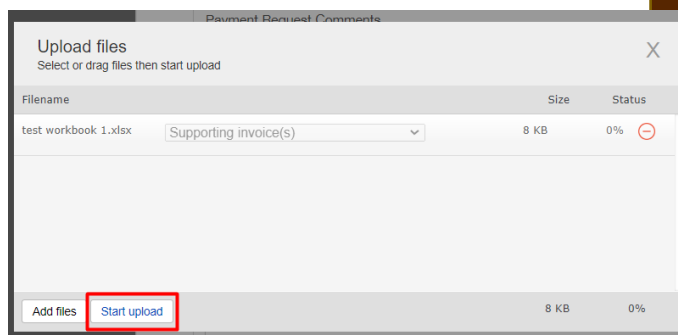
- 1) Click the **the +** icon to upload a document.



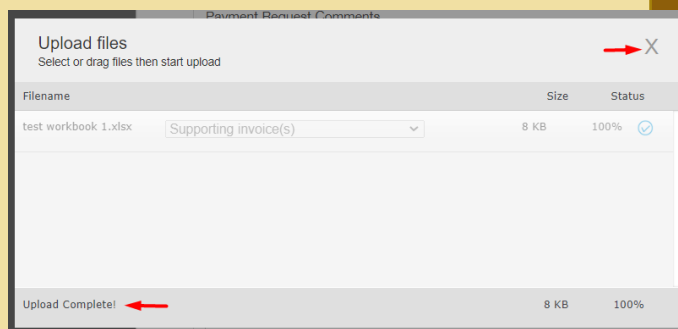
- 2) DRAG AND DROP the selected file to the Upload files window.



- 3) Click **Start upload**.



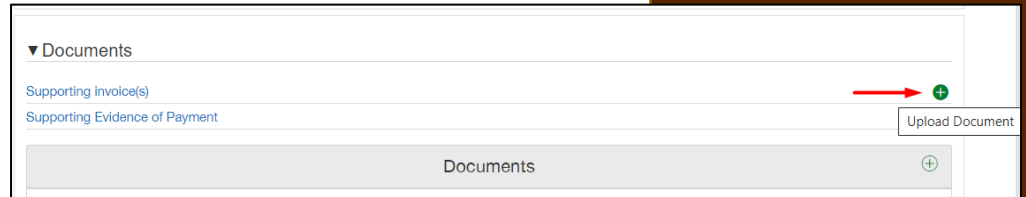
- 4) When the upload is complete, close the window.



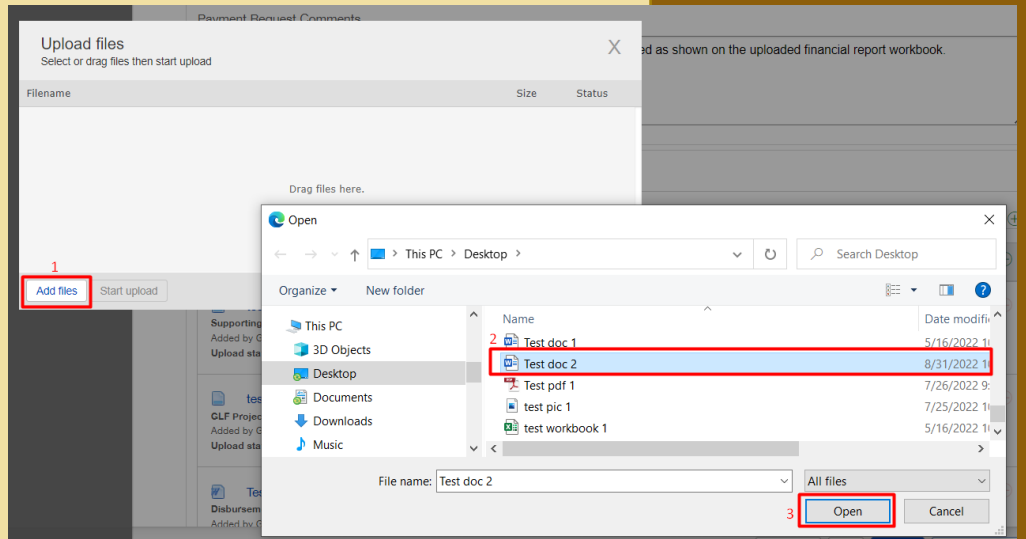
REPORTS (for grantees)

OR

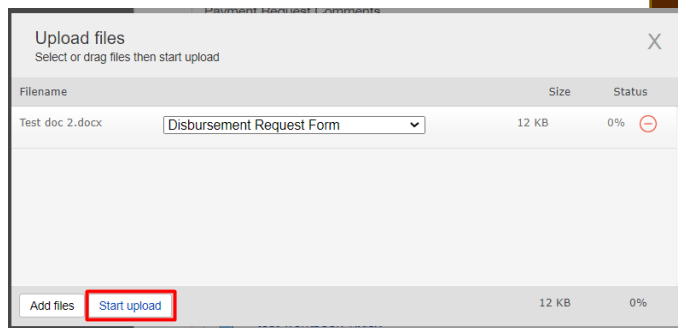
- 5) Click the the **+** icon to upload a document.



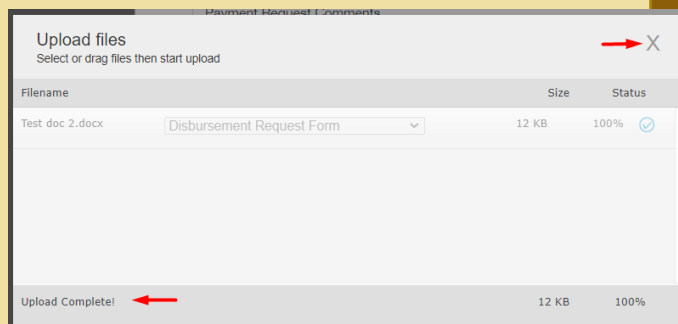
- 1) Click **Add files**. Select the file you wish to upload. Click **Open**.



- 2) Click **Start upload**.



- 3) When the upload is complete, close the window.



Still have questions? Send your question(s) to grantportalhelp@goldenleaf.org.