

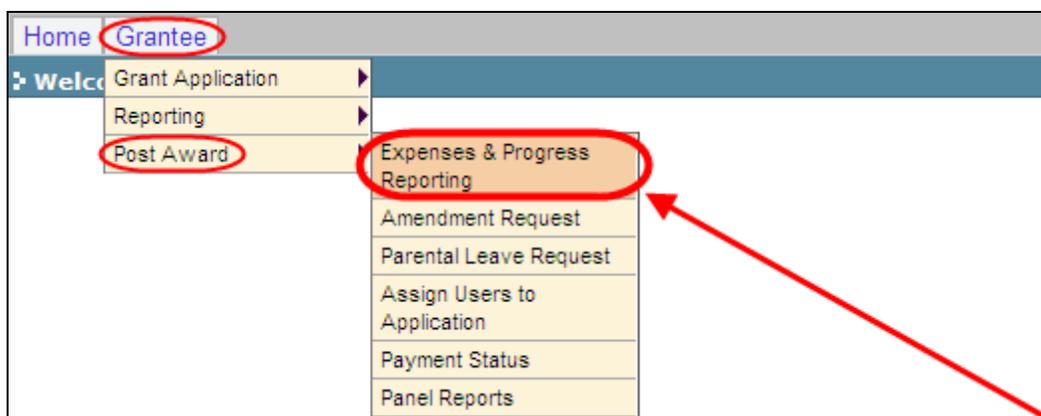


Click the button to watch a video tutorial

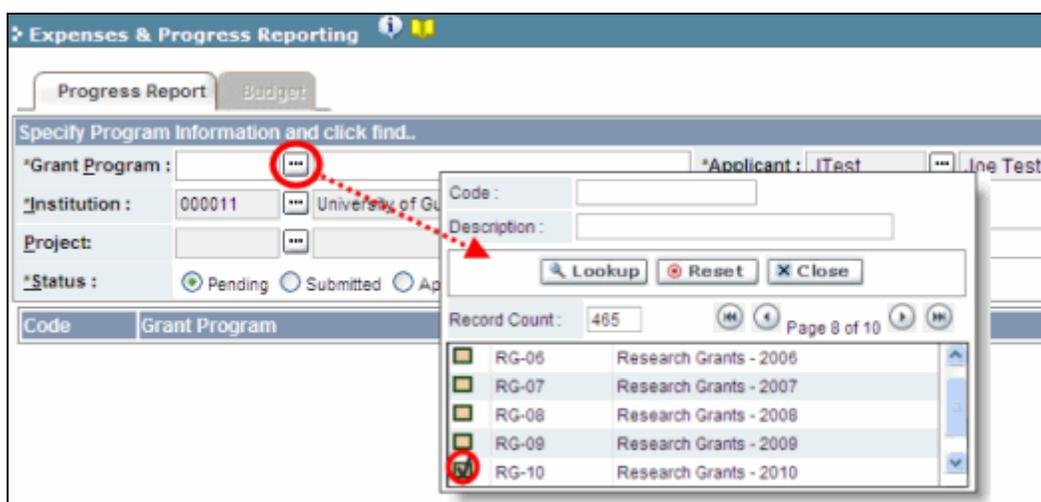
## Tipsheet for grantees: filing an annual progress or end of grant report

Grantees receiving awards paid out over multiple years are required to submit an annual progress or end of grant/final report summarizing their research findings and providing details regarding their publications, awards, and promotional activities. Failure to submit your annual progress report may result in suspension of award payments. Use the **Expense & Progress Reporting** module to fill out and submit the report form.

1. Go to the **EGrAMS home page** (<https://applyforfunds.cancer.ca/>) and log in.
2. Go to Grantee > Post Award > **Expenses & Progress Reporting** in the menu:



3. Set the criteria for **Grant Program** by clicking the  button and choosing the appropriate program (i.e. competition) from the lookup box:



4. Click the **Find** button at the bottom of the screen.



**NOTE: Displayed results may include other reporting items**

You may see other report types listed in addition to the Annual Progress Report. The Expense & Progress Reporting module is also used for:

- providing documentation to satisfy encumbrance requirements
- submitting expense claim reports
- viewing financial statements

5. Locate the Annual Progress Report in the displayed results and click anywhere on the text to access the report template.



**NOTE: Colour key for report listings**

Reports will be listed in green, gold or red text.

- If a report is listed in **green text**, it is not yet due.
- If it is listed in **gold text**, it is past due, but still within the grace period.
- If it is listed in **red text**, it is past due (late).

6. Complete each section of the report:

- Be sure to save your work before advancing to the next page of the report.
- An asterisk (\*) indicates a mandatory field.
- Click the **PDF** button if you would like to print or preview your report in PDF format.



**NOTE: Annual progress vs. end of grant or final reports**

Annual and end of grant reports use the same template, with some differences. The **Report Type** is indicated at the top of the Annual Progress Report form, with a pre-selected radio button (either **Regular** or **Final**).

Annual Progress Report

Program: Research Grants - 2009 (0) Applicant: Joe Test Institution: University of British Columbia Documents X Close

Period: 07/01/2009-06/30/2010 2009 Status: Pending Review Comments: [E]

Report Type:  Regular  Final

1 Of 4 [Next] [Previous]

List your cross appointments (Dept., Institution):

Regular = annual progress report  
Final = end of grant or final report

Advance to next or last screen of report

Relationship (name, designation and dept.) co-applicant or additional author [CP, C or A], Dept., Institution:

Are you fluent in both official languages?  Yes  No

\* indicates a mandatory field

Always save your work before advancing to the next screen

Validate View Errors PDF Save Cancel

## Validation

Before submitting your report, you must go through a validation process in order to identify any items left incomplete, or filled out incorrectly.

1. When you have completed the report, click the **Save** button. Next click the **Validate** button. Both are located at the bottom of the screen.

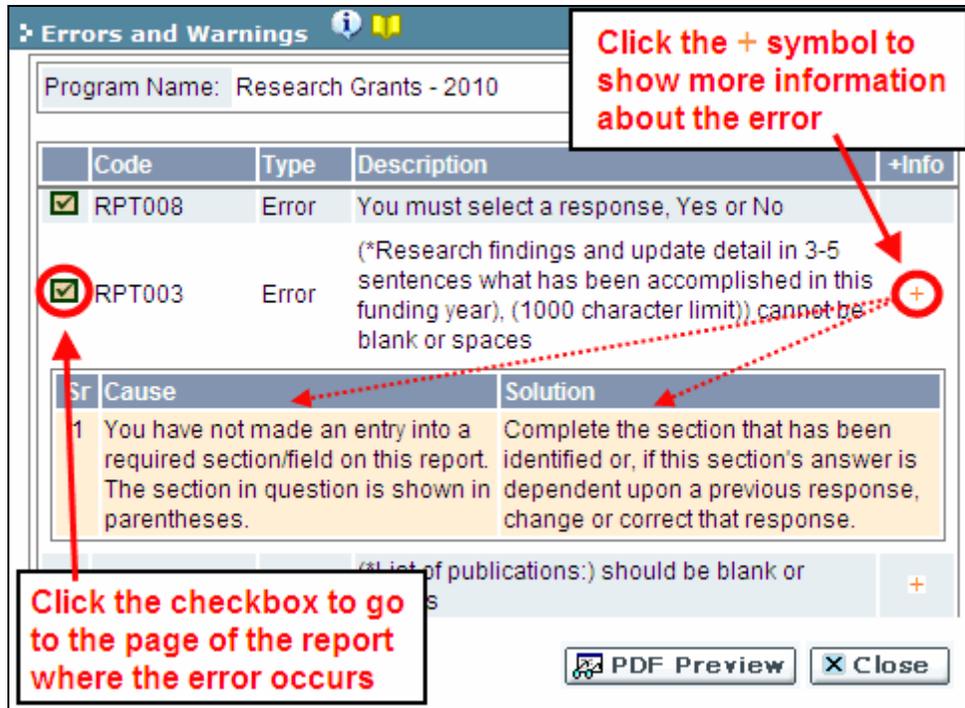
b. \*Research findings and update

c. \*Project Description

d. \*Impact and relevance

Validate View Errors PDF Save Cancel

2. If errors are found, a dialogue box will open with details.
  - Click on the + symbol under the **+Info** heading for information regarding the cause of the error and how to resolve it.
  - Click on the checkbox for the error you wish to correct to be directed to the page on which the error occurs.



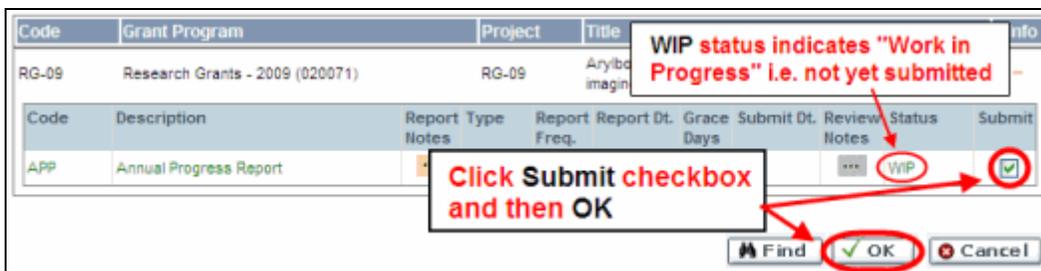
3. To view the **Errors and Warnings** dialogue box with the list of errors again, click the **View Errors** button at the bottom of the screen.
  - Resolved errors will continue to display until you click **Save** and then **Validate** again.

## Report submission

1. When you have completed, validated and saved the report, click the **Close** button at the top of the screen to return to the **Expense & Progress Reporting** main screen.



2. On the **Expense & Progress Reporting** screen, mark the **Submit** checkbox and click **OK** to complete the process.





### NOTE: Report status

After you submit your report, the **Status** listing for the report will switch from **Pending** to **Submitted**. When the CCS approves the report, the status will switch again, from Submitted to **Approved**.

If the report requires corrections, the CCS will send it back to you (see [Corrections](#), below).



### Best practice tip: locating reports after they've been approved

If you return to the **Expenses & Progress Reporting** module to check the status of a report you've submitted, set the **Status** radio button to **All** (the default setting is **Pending**) before clicking **Find**:

This will ensure that all reports you've created in the module will be listed in the displayed results, regardless of their status (i.e. Pending, Submitted, Corrections, or Approved).

## Corrections

If you submit a report that requires clarification, you will be notified via e-mail and asked to re-submit the report.

1. Follow [steps 1-4](#) on page 1 to locate your annual progress report.
2. Click the **...** button under the **Review Notes** heading to view the feedback requesting corrections:

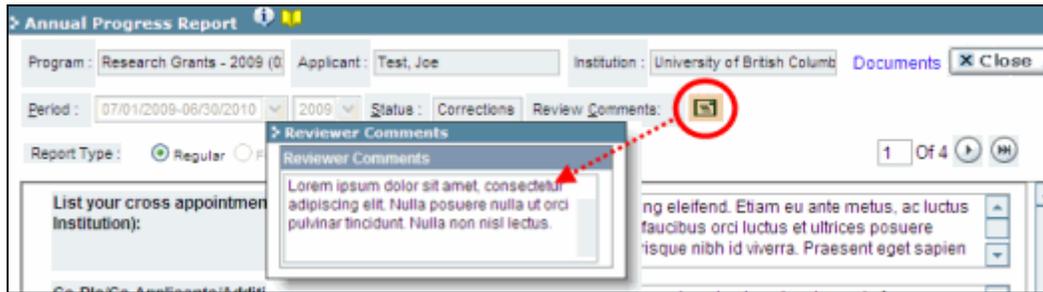
**Click the ... button to display the Reviewer Comments**

Code	Grant P	Notes	Freq.	Report Dt.	Grace Days	Submit Dt.	Review Notes	Status	Submit
APP	Annual Progress Report	...	Statistics Yearly	06/30/2010	30	03/16/2010	...	Corrections	<input type="checkbox"/>

**Note the status of the report has changed to Corrections**

**Reviewer Comments**  
 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla posuere nulla ut orci pulvinar tincidunt. Nulla non nisi lectus.

3. Per [step 5](#) on page 2, access the report by clicking anywhere on the text of the annual progress report.
4. Make the necessary corrections as per the review comments.
  - Click the  button at the top of any page of the report to view the **Reviewer Comments** again.



5. When your corrections are in place, submit your report again, as per the instructions provided in [Report submission](#).