



Need help? Ask us! Email CCS staff at research@cancer.ca

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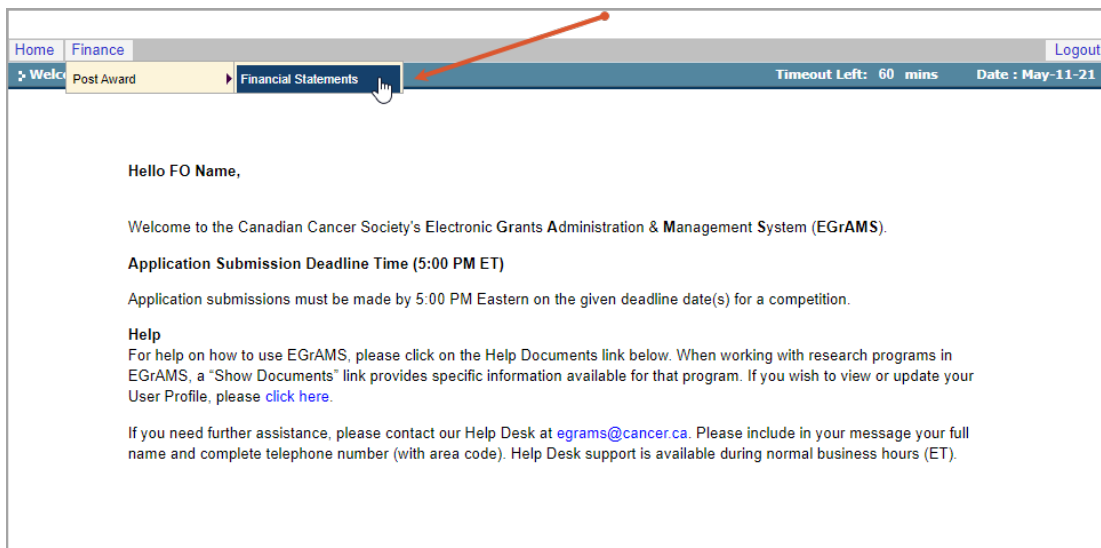
Grants that can submit statements online

All CCS (including former CBCF and PCC) grants can now submit financial statements of account online, with the exception of Major programs (CCTG, MP), some partnership programs (CQDM), former Canadian Breast Cancer Foundation grants awarded before 2015, and PCC TAG and Team grants. These will need to be submitted by email, using our online template, which can be downloaded from link.

Note: for partnered grants where the host institution is paid directly by the partner, payment and spending information should only be provided for the CCS portion.

Accessing the new statement of account

1. An email will be sent to the Financial Officer (FO) that was listed in the grant application 15 days before the grant anniversary date and must be submitted 60 days after the anniversary date. The email will include user ID and password reset information (if required). If the Financial Officer has changed, please contact research@cancer.ca as soon as possible.
2. The Financial Officer logs into EGrAMS using the log in information provided in the email. Select the Finance tab>Post award>Financial Statements. This will lead to you to the Financial Statements workbench.





- To access a specific statement, select 'Grant Program' first, then 'Applicant' details from the pop-up boxes (be sure to allow pop-ups on your browser).

Home Finance Logout
Financial Statements (*)-Required field Timeout Left: 59 mins Date: May-11-21

Specify Program Information and click find...

*Grant Program : PROG-1 Program_Name_1 *Applicant :
*Institution :
Project : Report :
*Status : Pending Submitted Approved Cancelled Pending Correction Request All

Code	Description	+Info
PROG-1	Program_Name_1	
PROG-2	Program_Name_2	

User Name: FO_Name [FO Name] , Agency:

Home Finance Logout
Financial Statements (*)-Required field Timeout Left: 60 mins Date: May-11-21

Specify Program Information and click find...

*Grant Program : PROG-1 Program_Name_1 *Applicant : PI_Name Name.PI
*Institution : 004004 Institution_Name
Project : Report :
*Status : Pending Submitted Approved Cancelled Pending Correction Request All

User Name	Applicant	Trk. No.
PI_Name	Name.PI	7#####
PI_Name_2	Name_2.PI	7#####

User Name: FO_Name [FO Name] , Agency: In



4. Press the 'Find' button to view outstanding statements.

Home Finance Logout
Financial Statements (*)-Required field Timeout Left: 60 mins Date : May-11-21

Specify Program Information and click find..

*Grant Program : PROG-1 Program_Name_1 *Applicant : PI_Name Name, PI
*Institution : 004004 Institution_Name
Project : Report :
*Status : Pending Submitted Approved Cancelled Pending Correction Request All

Code	Description	Report Notes	Type	Report Freq.	Report Dt.	Grace Days	Submit Dt.	Review Notes	Status	Submit
PROG-1	Program_Name_1 (705559)									
FINST	Financial Statement of Account	...	Statistics	Yearly	10/31/2018	160		...	XP-ENT / W	<input type="checkbox"/>

Find OK Cancel

Note: to view all reports (including submitted and approved) please change the radio button from 'Pending' to 'All' in the 'Status' section, then select 'Find'.



Entering financial data

1. Select the report you would like to submit and it will lead you to the first page of the statement.
 - 'Closing balance of the grant for the previous period' is autofilled from the previous year's statement balance for most grants. If no balance is listed you will need to provide the details.
 - 'Grant funds received in the current period' and 'Funds received in current period for permanent equipment specified in the NOA' sections are autofilled from CCS's grant payment records.
 - 'Carryover from previous grant' section is only for renewed Impact Grants.

Home Finance Logout

Financial Statement of Account Timeout Left: 60 mins Date: May-11-21

Program: Program_Name_1 (705559) Applicant: Name.PI Institution: Institution_Name Documents X Close

Period: 11/01/2017-10/31/2018 2017 Status: Work in Progress Review Comments: [icon]

Report Type: Regular Final Show Tree 1 Of 4 >>

Note that an annual Statement of Account (SOA) is due 60 days after the grant/award year end.

Original contract number (If this is a renewed grant in its first year):	
Beginning of reporting period:	2017-11-01
End of reporting period:	2018-10-31
Grant year reported:	1/3

FUNDS AVAILABLE FOR CURRENT PERIOD

Carryover from previous grant:	
Closing balance of the grant for the previous period:	
Grant funds received in the current period:	38,800.00
Funds received in current period for permanent equipment specified on the NOA:	
A Total funds available for current period :	38,800.00

Validate View Errors PDF Save Cancel



- Continue to page 2 by selecting the forward arrow and enter the 'Expendable and Supplies' details, scroll down the page to view or enter all line items. Select 'Save' and the subtotal will auto fill in page 3.

Home Finance Logout

Financial Statement of Account Timeout Left: 60 mins Date: May-11-21

Program : Program_Name_1 (705559) Applicant : Name, PI Institution : Institution_Name Documents X Close

Period : 11/01/2017-10/31/2018 2017 Status: Work in Progress Review Comments: [icon]

Report Type : Regular Final Show Tree 2 Of 4

Expendables / Supplies details

Expendables / Supplies	100,000.00
Minor Equipment (<\$1,000 per line item)	
Animals and upkeep	
Publications	
Conference Travel (not to exceed 5% of base budget)	
Research travel	
Services [service contracts / consultants, etc]	

Details of services

[Text Box]

Validate View Errors PDF Save Cancel

Note: If you have the services or miscellaneous details, please enter them in the text box, otherwise the Principal Investigator (PI) will enter this after the FO submits the report for their review.



3. On page 3 please enter the 'Salaries and Benefits' and 'Permanent Equipment' (if applicable) details and select 'Save'.
 - The 'Funds Spent to Date (%)' will populate a percentage based on the approved grant budget. (the 'Funds Spent (%)' column to the left is for the current year only)
 - **If the variance in the 'Funds Spent to Date (%)' column is more than 30% (lower than 70% or higher than 130%), a justification will have to be submitted.**
 - The FO or PI can attach the justification document (PDF file).

The screenshot shows the 'Financial Statement of Account' interface. At the top, there are navigation links for 'Home' and 'Finance', and a 'Logout' button. The main header includes 'Financial Statement of Account', 'Timeout Left: 60 mins', and 'Date: May-11-21'. Below this, there are input fields for 'Program' (Program_Name_1 (705559)), 'Applicant' (Name.PI), and 'Institution' (Institution_Name), along with a 'Documents' button and a 'Close' button. The 'Period' is set to 11/01/2017-10/31/2018, and the 'Status' is 'Work in Progress'. There are also options for 'Report Type' (Regular or Final) and a 'Show Tree' button. The main table displays 'EXPENDITURES INCURRED FOR CURRENT PERIOD' with columns for 'Actual', 'Budgeted', 'Funds Spent (%)', and 'Funds Spent to Date(%)'. The table includes rows for 'Expendables / Supplies', 'Salaries and Benefits', 'Permanent Equipment', and a 'Total' row. Below the table is an 'UNSPENT (OVERSPENT) BALANCE' row. At the bottom, there is a 'Justification' field with a 'Choose File' button and a 'No file chosen' message. The interface also includes a 'Validate' button, a 'View Errors' button, a 'PDF' icon, a 'Save' button, and a 'Cancel' button. Red arrows point from the 'Choose File' button to the 'Funds Spent to Date(%)' column and from the 'Save' button to the 'Funds Spent to Date(%)' column.

EXPENDITURES INCURRED FOR CURRENT PERIOD	Actual	Budgeted	Funds Spent (%)	Funds Spent to Date(%)
Expendables / Supplies	100,000.00	31,600.00	316.46	316.46
Salaries and Benefits (details must be available on request)	7,000.00	7,200.00	97.22	97.22
Permanent Equipment specified on NOA (separate expense claim must be submitted)		0.00		
Total expenditures incurred for reporting period	107,000.00	38,800.00		
UNSPENT (OVERSPENT) BALANCE				-68,200.00

Note: a paperclip icon will show beside the 'Choose File' button once a PDF file is uploaded.



Submitting the statement of account for Principal Investigator approval

1. Page 4 is for the Financial Officer to certify the declaration and enter their email address for verification. If the person who compiled the report is different than the Financial Officer, this information can also be entered here. Select the 'Save' button.

Home Finance Logout

Financial Statement of Account Timeout Left: 60 mins Date: May-11-21

Program: Program_Name_1 (705559) Applicant: Name, PI Institution: Institution_Name Documents X Close

Period: 11/01/2017-10/31/2018 2017 Status: Work in Progress Review Comments: [icon]

Report Type: Regular Final Show Tree 4 Of 4

Grantee declaration

I hereby certify that the above statement is correct; that the expenditures conform to the general conditions and regulations governing grants as outlined at (www.cancer.ca/research) and were for the purpose for which the grant was made. Yes No X

Financial Officer declaration

I hereby certify that the expenditures summarized above were incurred wholly and paid on behalf of the grantee and that vouchers are available for audit purposes. Yes No X

E-mail: [input field] X

Details of person who compiled this report (only required if different than Financial Officer):

Name: [input field]

E-mail: [input field]

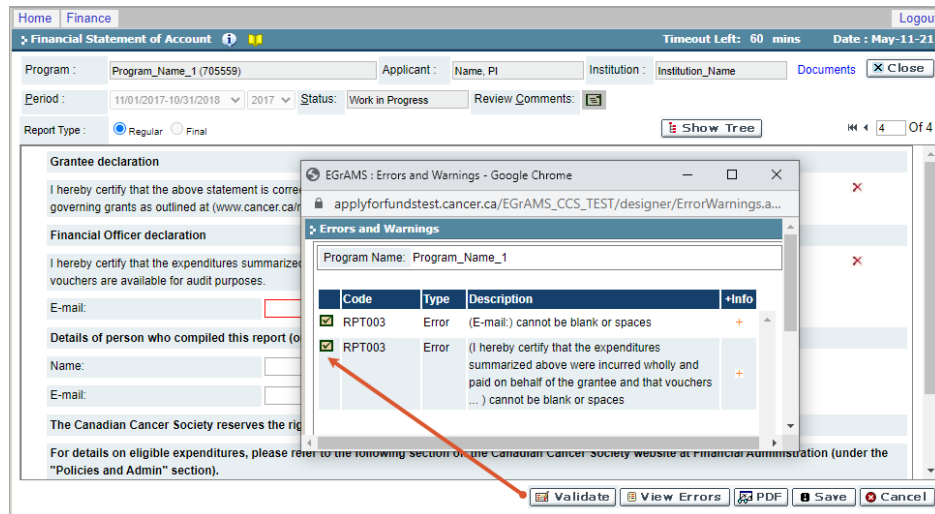
The Canadian Cancer Society reserves the right to audit the Statement of Account.

For details on eligible expenditures, please refer to the following section on the Canadian Cancer Society website at Financial Administration (under the "Policies and Admin" section).

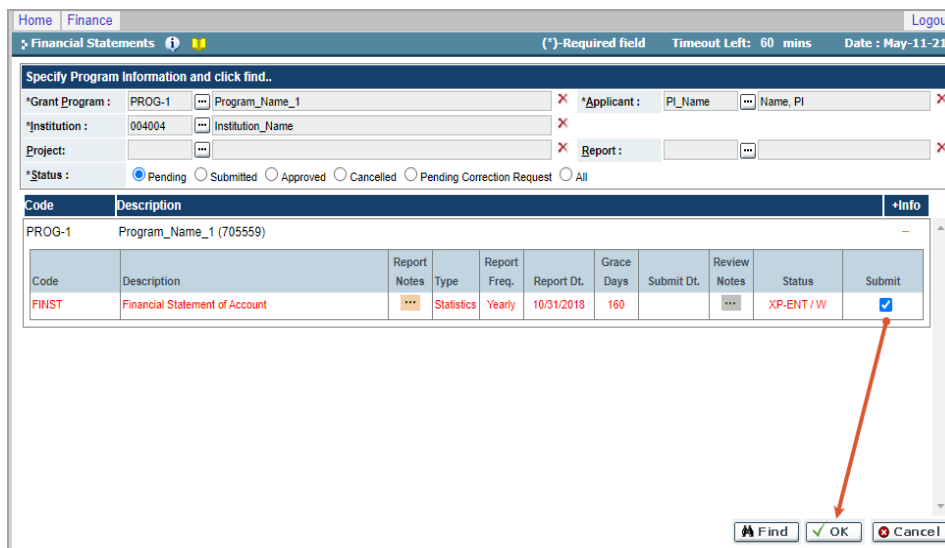
Validate View Errors PDF Save Cancel



- Report verification is completed by selecting the 'Validate' button.
 - If there are any issues, a pop-up box will provide details of what areas need to be fixed.
 - Pressing the yellow check box will lead you to the page that the errors are on.
 - Once all errors are fixed and saved, re-validate to confirm issues are cleared, then close the report.



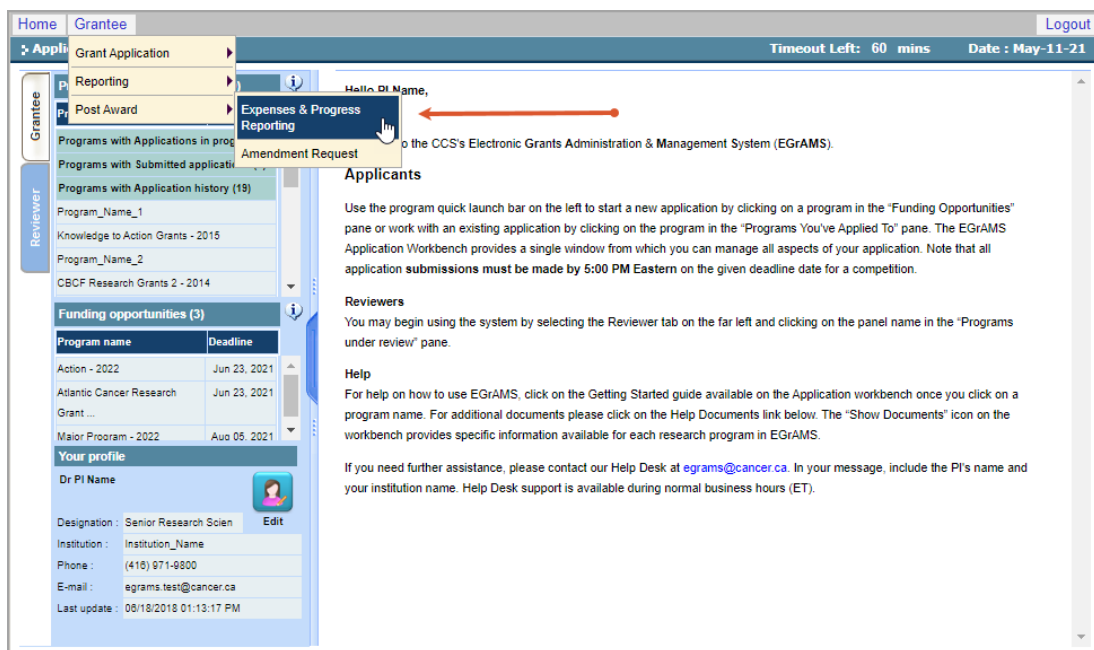
- Submit the report by checking the 'Submit' box and pressing 'OK'. A pop-up box will confirm it has been submitted. After the statement is submitted, an email will be sent to the PI to review and enter any missing details/explanations and submit for approval from CCS.





Principal Investigator statement review and approval

1. An automatic email will be sent to the Principal Investigator from EGrAMS once the Financial Officer has submitted the details to EGrAMS (please mark egrms@cancer.ca as safe in your spam email filter, the email address sometimes gets blocked).
2. Access the statement by logging into EGrAMS, selecting the 'Grantee' tab at the top left of the workbench>Post Award>Expense & Progress Reporting.





3. Once you are in the 'Expense & Progress Reporting' page:

- Select the 'Grant Program' from the list in the pop-up box (the program code will be listed in the email sent from egramscancer.ca). Press the 'find' button.

The screenshot displays the EGrAMS system interface. At the top, there are navigation tabs for 'Home' and 'Grantee', and a 'Logout' link. The main header indicates the current page is 'Expenses & Progress Reporting' with a timeout of 60 minutes and the date 'May-11-21'. Below this is a form titled 'Specify Program Information and click find..'. The form contains several fields: '*Grant Program' (set to 'PROG-1'), '*Institution' (set to '004004'), '*Applicant' (set to 'PI_Name'), and '*Status' (set to 'Pending'). There are also dropdown menus for 'Program_Name_1', 'Institution_Name', and 'Report'. A red arrow points from the 'Program_Name_1' dropdown to the 'Find' button in the 'Lookup' pop-up window.

The 'Lookup' pop-up window is titled 'EGrAMS : Lookup - Google Chrome' and contains a search form with 'Code' and 'Description' fields. Below the search form is a table with 19 records. The table has columns for 'Code' and 'Description'. The selected record is 'PROG-1' with the description 'Program_Name_1'. Other records include 'PIMRF-08', 'PTS-13', 'PROG-2', 'RG-01', and 'RG-02'. At the bottom of the pop-up window, there are 'Find', 'OK', and 'Cancel' buttons. A red arrow points from the 'PROG-1' entry in the table to the 'Find' button.

Code	Description
PIMRF-08	Prevention Init.-Modif. Risk Ftrs & Cdtns - 2009 LOI
PTS-13	Prevention Translation Supplement Award -2013
PROG-1	Program_Name_1
PROG-2	Program_Name_2
RG-01	Research Grants - 2001
RG-02	Research Grants - 2002

- Select the outstanding statement to review, this will direct you to the 'Financial Statement of Account' workbench.



- Page 1 is autofilled, proceed to page 2 and provide details for 'Services' or 'Miscellaneous' if spending is reported in those sections. Scroll down the page and save all updates and proceed to page 3.

Home Grantee Logout
Financial Statement of Account Timeout Left: 60 mins Date: May-11-21

Program: Program_Name_1 (705559) Applicant: PI Name Institution: Institution_Name Documents X Close

Period: 11/01/2017-10/31/2018 2017 Status: Work in Progress Review Comments: [icon]

Report Type: Regular Final Show Tree 2 Of 4

Expendables / Supplies details

Expendables / Supplies 100,000.00

Minor Equipment (<\$1,000 per line item)

Animals and upkeep

Publications

Conference Travel (not to exceed 5% of base budget)

Research travel

Services [service contracts / consultants, etc] 2000

Details of services

Validate View Errors PDF Save Cancel

- Page 3 shows the actual spending vs. the budgeted spending from the original grant application budget. **If the variance is more than 30% (lower than 70% or higher than 130%) in any or all of the three sections (Expendables / Supplies, Salaries and Benefits, Permanent Equipment), attach and save the justification (PDF file).**

Note: a paperclip icon will show beside the 'Choose File' button once uploaded.

Home Grantee Logout
Financial Statement of Account Timeout Left: 60 mins Date: May-11-21

Program: Program_Name_1 (705559) Applicant: PI Name Institution: Institution_Name Documents X Close

Period: 11/01/2017-10/31/2018 2017 Status: Work in Progress Review Comments: [icon]

Report Type: Regular Final Show Tree 3 Of 4

EXPENDITURES INCURRED FOR CURRENT PERIOD	Actual	Budgeted	Funds Spent (%)	Funds Spent to Date(%)
Expendables / Supplies	100,000.00	31,600.00	316.46	316.46
Salaries and Benefits (details must be available on request)	7,000.00	7,200.00	97.22	97.22
Permanent Equipment specified on NOA (separate expense claim must be submitted)		0.00		
Total expenditures incurred for reporting period	107,000.00	38,800.00		
UNSPENT (OVERSPENT) BALANCE				-68,200.00

Justification (for any spending variance over/under 30% from approved budget)

Choose File No file chosen

Validate View Errors PDF Save Cancel



6. Page 4 of the Financial Statement of Account is the Grantee declaration. Once this has been completed and saved, select the 'Validate' button.
 - If there are any missing items a pop-up box will show what needs to be fixed. Select the arrow in the pop-up box to direct you to the page where the error is.
 - Once all errors are corrected, saved and re-validated, close the report.

The screenshot displays the EGrAMS Financial Statement of Account interface. The main window shows the 'Grantee declaration' section with a form containing several text areas and radio buttons for 'Yes' and 'No'. A pop-up window titled 'EGrAMS : Errors and Warnings - Google Chrome' is overlaid on the main window. This pop-up window contains a table of errors and a 'Validate' button. An orange arrow points from the 'Validate' button in the pop-up window to the 'Validate' button in the main window. Another orange arrow points from the 'Validate' button in the main window to the 'Yes' radio button in the 'Grantee declaration' form.

Code	Type	Description	Info	
<input checked="" type="checkbox"/>	RPT003	Error	(E-mail:) cannot be blank or spaces	+
<input checked="" type="checkbox"/>	RPT003	Error	(I hereby certify that the expenditures summarized above were incurred wholly and paid on behalf of the grantee and that vouchers ...) cannot be blank or spaces	+



7. Back in the main 'Expense & Progress reporting' workbench, select the submit box and press 'OK'. You will receive an email confirmation from egramscancer.ca.

The screenshot shows the 'Expenses & Progress Reporting' web application. At the top, there are navigation links for 'Home' and 'Grantee', and a 'Logout' button. The main header includes the application name, a 'Required field' indicator, a 'Timeout Left: 60 mins' timer, and the current date 'May-11-21'. Below the header is a search form titled 'Specify Program Information and click find..'. The form contains several input fields: '*Grant Program' (value: PROG-1), '*Institution' (value: 004004), 'Project', '*Applicant' (value: PI_Name), and 'Report'. There are also radio buttons for '*Status' with options: Pending (selected), Submitted, Approved, Cancelled, Pending Correction Request, and All. Below the search form is a table with columns: Code, Description, Report Notes, Type, Report Freq., Report Dt., Submit Dt., Review Notes, Status, and Submit. The table contains one row with the following data: Code: FINST, Description: Financial Statement of Account, Report Notes: (empty), Type: Statistics, Report Freq.: Yearly, Report Dt.: 10/31/2018, Submit Dt.: (empty), Review Notes: (empty), Status: XP-ENT / W, and Submit: (checkbox checked). A red arrow points from the 'Submit' checkbox to the 'OK' button at the bottom right of the interface. The 'OK' button is highlighted with a green checkmark, and there are also 'Find' and 'Cancel' buttons.

Code	Description	Report Notes	Type	Report Freq.	Report Dt.	Submit Dt.	Review Notes	Status	Submit
FINST	Financial Statement of Account		Statistics	Yearly	10/31/2018			XP-ENT / W	<input checked="" type="checkbox"/>

8. Once the Statement of Account is submitted by the FO and approved by the PI, it will be reviewed by CCS staff. If we have any questions, we will follow-up by email from egramscancer.ca or research@caner.ca.