

ONLINE SUBMISSION INSTRUCTIONS

PREPARATION

Read this document before starting the report submission process.

All interim reports must be submitted through the NYSHealth's online grantee portal system. Remember that some requested information may require collaboration from other departments in your organization.

Helpful tips:

- **Timing Out** – The grantee portal is set to time out after one hour. Please *regularly* save while working.
- **Complete Report as a Word Document** – Complete the report as a Word document first; then copy and paste into the appropriate online fields. Each section lists a maximum character limit.
- **Online Formatting** – Narrative fields in the online reporting form are plain text format and do not support any formatting. List any references/footnotes parenthetically in the text.
- **Save and Return** – You do not have to complete the reporting form all at once. You can save your work and return at a later time by logging on to the grantee portal.

GRANTEE SUPPORT

For programmatic questions regarding your report, please contact the Foundation staff member overseeing your grant.

If you have questions or difficulties using the grantee portal, please contact our Grants Management Department at grantsmanagement@nyshealth.org or call (212) 584-7689; please leave your telephone number.

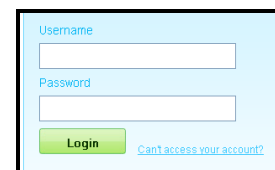
GRANTEE PORTAL LOG ON

To access NYSHealth's grantee portal, use this link:

<https://NewYorkStateHealth.foundationconnect.org/GrantsManager/Pages/Login/Login.aspx?OrgID=00D8000000d0Xg>
(This link is available on our website.)

Do not create new credentials. Use your existing credentials, created during your application process, to log in.

- **Forgot Your Password?** Click on '[Can't access your account?](#)' to receive a temporary password.
- **Forgot Your Username?** Please contact NYSHealth Grants Management as listed above.

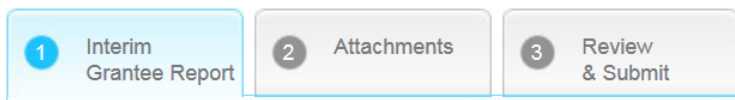


ACCESSING THE GRANTEE PORTAL REPORT FORM

Once logged in, you will see this dashboard. Identify the grant number (ID Number) assigned to your project. The report(s) required for your grant are listed below the ID Number. Select the report that you will be submitting by clicking on the **Edit** icon.

Open Items		History					
Edit	View	ID Number	Project Name	Type	Record Type	Status	
				All	All	All	
▼	🔍	15-03208	Sample Grant - with Goals & Outcomes	Grant / Application	Test Page Layout Design	Awarded	
	🔍		GR-000002474 due 09/30/2016	Grant Report	Final Grantee Report(s)	Scheduled	
	🔍		GR-000002475 due 09/30/2015	Grant Report	Interim Grantee Report(s)	Scheduled	

STEP 1 — COMPLETING THE INTERIM GRANTEE REPORT



Note: Depending on the nature of the project being funded, grantees may be asked to provide reports that differ from these general guidelines. Please consult with your designated Foundation staff member prior to preparing any reports.

I. Grant Summary Section

The summary sections reflect information from your original grant application.

Grant Summary			
Request Number	15-03208	Due Date	9/30/2015
Grantee Organization	*Sample Application	Submission Date	7/29/2015
Request	Sample Grant - with Goals & Outcomes		

II. Contact Summary Section

Contact Summary			
Please contact the NYSHealth Grants Management Team if the primary contact for this grant should be updated.			
Report Contact	Ursula Stewart	Address	1385 Broadway New York, NY 10018
Title	Grants Coordinator	Email	stewart@nyshealth.org
Contact Organization	NYS Health	Phone	(212) 584-7689
Fax	(646) 421-6029		

III. Progress of Goals and Expected Outcomes Section

The goals and expected outcomes that were initially submitted in your initial online application are listed for your easy access and review.

GRANTEE INTERIM REPORT - PROGRESS TOWARD EXPECTED OUTCOME(S)			
Review of Goals & Expected Outcome(s)			
Goal #1	Produce a report of informed estimates of homelessness, SH needs in up to four NYS geographic areas.	Goal #1 - Expected Outcome(s)	Completion and dissemination of report in partnership with NYSHealth.
Goal #2	To inform state-level decision making related to supportive housing funding.	Goal #2 - Expected Outcome(s)	Based on informal feedback from key stakeholders at state agencies (COH, NYS HCR, OAH, OASAS, OPWDD, OTDA), the community housing needs assessment report provides a means for these agencies and the members of the MRT Affordable Housing Work Group to make educated decisions in determining 2015 (future) MRT supportive housing funding allocations.
Goal #3		Goal #3 - Expected Outcome(s)	
Goal #4		Goal #4 - Expected Outcome(s)	
Goal #5		Goal #5 - Expected Outcome(s)	

Document the current outcomes of each goal in this section. (Recommended Length: Up to 2,500 characters with spaces)

INTERIM NARRATIVE DUE - Progress Toward Expected Outcome(s)	
Goal #1 - Actual Outcome(s)	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>
	2500 characters remaining

Note: For grantees who submitted an online application prior to NYSHealth instituting the Goals and Expected Outcomes section into the application, we ask that you contact the Foundation staff member overseeing your project for directions on completing the goals and outcomes.

IV. Interim Narrative Section**Project Implementation and Administration (Recommended Length: Up to 5,000 characters with spaces):**

Describe the major administrative and day-to-day activities of the project during this reporting period. These could include: hiring of staff, identification of consultants, recruitment of project participants, creation of a database, and inception of an intervention. Please note if there have been any major personnel changes on the project team.

Accomplishments and Challenges to Date (Recommended Length: Up to 5,000 characters with spaces):

Explain the programmatic progress you are making and refer to your work plan deliverables as necessary.

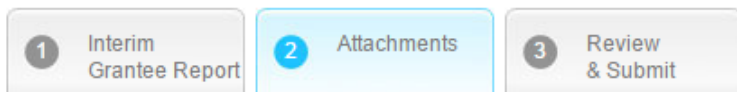
- Have you produced any new reports, published materials, or other products since the creation of your proposal and work plan?
- Have there been any press announcements? If so, please upload them in the Attachments tab.
- Did you document any new expected outcomes for your project in the Goals and Expected Outcomes section above?
- Did you have to update any existing expected outcomes?

Although your accomplishments are important, it is equally important to tell us about the challenges you are facing and how you plan to address them. Challenges are inherent to innovative projects that strive to change a system, test a new model, or explore a new topic. Sharing the difficulties you are facing gives us a chance to help, if possible. It also helps us to learn from your experiences and guide our future efforts.

Challenges could include: unexpected staffing changes, obstacles to implementation, low recruitment rates, delays in setting up services, activities originally proposed that cannot be undertaken, changes in the population or community you were targeting, and other internal/external problems.

Next Steps (Recommended Length: Up to 5,000 characters with spaces):

Please outline the major tasks that will be undertaken between now and the end of the grant period. If you wish, this can be formatted as a timeline or work plan, but should contain sufficient detail to keep us apprised of your plans and progress.

STEP 2 — ATTACHMENTS**Documents to Attach****1. Interim Financial Reporting Template (Required: Download template, complete, and upload)**

Note: Should there be any changes to the original approved budget, please notify your designated Foundation staff member as soon as possible.

Please ensure that your budget fits an 8.5 X 11 sheet of paper and full number/dollar amounts are visible in each cell. If a worksheet is "protected," the password is "nyshf."

2. Charts & Tables (Optional)

This upload field is available to grantees who may have charts and/or tables, which are not supported in the previous online report narrative fields.

3. Other Published Materials (Optional)

Have you produced any new reports, products, or other materials since the creation of your proposal and work plan? Have there been any press announcements? If so, please upload them here.

Note: The upload field holds one attachment only. Multiple documents should be included in one external Word document or a PDF.

Instructions for Downloading Templates and Uploading Documents

Downloading Templates:

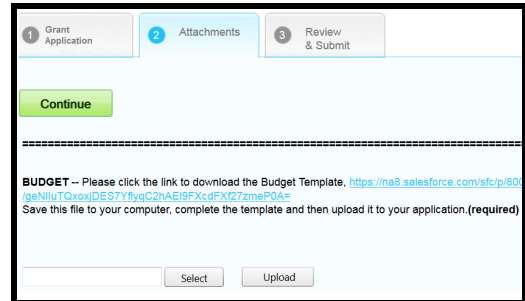
In the **Attachments** tab, click on the link of the template you need; then click **Download** in the lower left-hand corner of that screen.



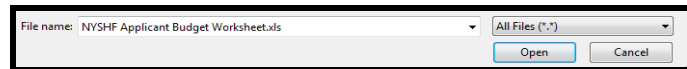
Uploading Documents:

Step 1: Click on the **Select** button and search for the document you would like to upload.

Note: The upload field holds one attachment only. Multiple documents should be included in one external Word document or in a PDF.

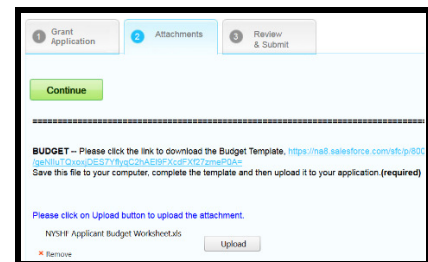


Step 2: Select the document, then click on the **Open** button from your directory.

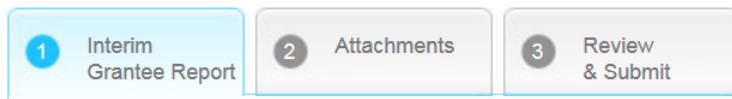


Step 3: The document name will appear in the section. Click the **Upload** button to complete the uploading process.

Note: If uploading assistance is needed, please contact NYSHealth Grants Management at (212) 584-7689.



STEP 3 — REVIEW & SUBMIT



When you have finished entering and reviewing all the necessary information, click **Submit**. You will receive an e-mail indicating that you have successfully submitted the report form.

Not ready to submit? Click **Save** and log out. Simply log back on to the grantee portal to continue editing at a later time.

FEEDBACK

We welcome and encourage your comments about your online experience. Please send your feedback to grantsmanagement@nyshealth.org.