PREPARATION

Read this before starting the report submission process.

All Interim Reports must be submitted through 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 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 back 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 Keenen Willis, Grants Assistant, at willis@nyshealth.org or call **(212) 584-7675**; please leave your telephone number.
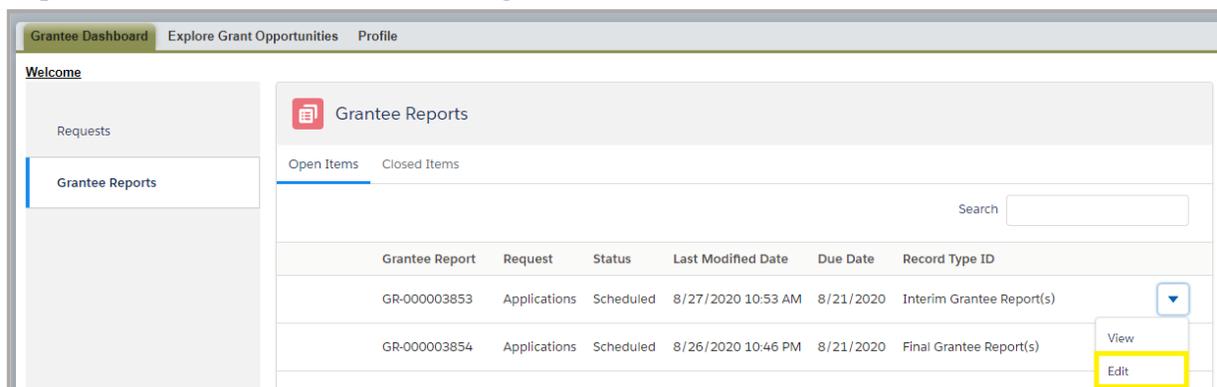
GRANTEE PORTAL LOGIN

Access NYSHealth's grantee portal here. Use the credentials you created during your application process to log in (do not create a new account).

- **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.
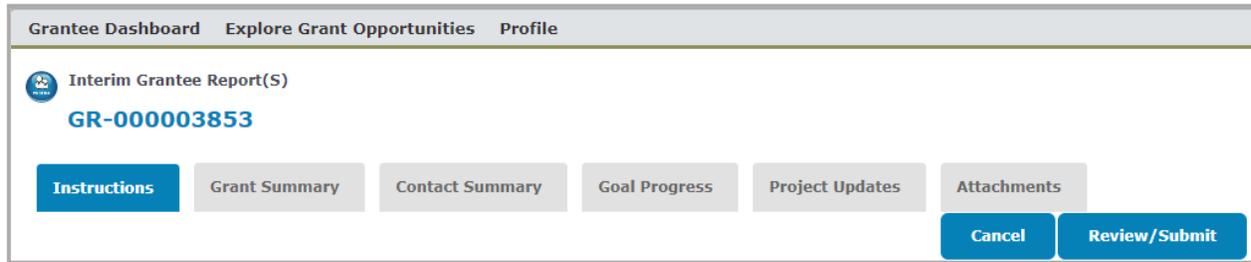
ACCESSING THE GRANTEE PORTAL REPORT FORM

Once logged in, you will see this dashboard. Go to Grantee Reports, find your Interim Grantee Report(s), and click the arrow on the right to edit.

COMPLETING THE INTERIM REPORT

Grantee Dashboard	Explore Grant Opportunities	Profile			

Interim Grantee Report(S)

GR-000003853

Instructions	Grant Summary	Contact Summary	Goal Progress	Project Updates	Attachments
				Cancel	**Review/Submit**

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

This section reflects information from your original grant application. Please click on **Save and Next** to go on to the next section.

II. Contact Summary

This section reflects contact information from your original grant application. Please click on **Save and Next** to go on to the next section. If the primary contact for this grant needs to be updated, contact the NYSHealth Grants Management team in the Grantee Support section above.

III. Goal Progress

The goals and expected outcomes that were submitted in your initial online application are listed for your review.
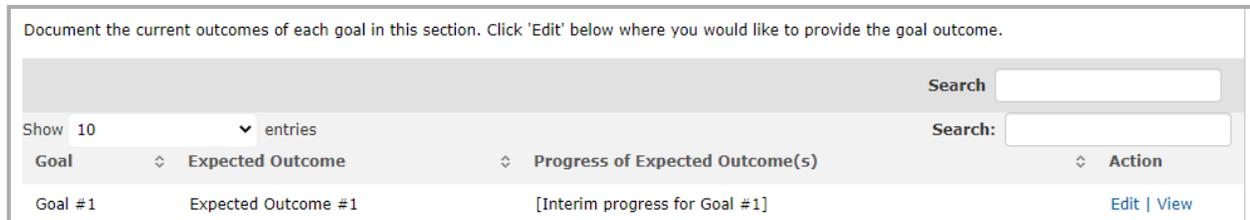
Document the current outcomes of each goal in this section. Click 'Edit' below where you would like to provide the goal outcome.

			Search [ ]
Show 10 ⌄ entries			Search: [ ]
Goal ⇅	**Expected Outcome** ⇅	**Progress of Expected Outcome(s)** ⇅	**Action**
Goal #1	Expected Outcome #1	[Interim progress for Goal #1]	Edit	View

For each goal, describe your progress, as well as any revisions to your goals and/or outcomes from what was originally proposed and approved, and tell us the reasons for the changes. (*Maximum length: 2,500 characters with spaces per goal*)

IV. Project Updates

Project Implementation and Administration (*Maximum length: 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 *(Maximum length: 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 in the **Goal Progress** tab?

- 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 *(Maximum length: 5,000 characters with spaces)*
Please outline the major tasks that will be undertaken between now and the end of the grant. 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.

V. **Attachments**
   1. **Interim Financial Reporting Template** *(Required)*
      Download the Financial Reporting Template, save the file to your computer, complete the template, and then upload it to your application. **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 online 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.

VI. **Review/Submit**

When you have finished entering and saving all the necessary information under the various tabs, click **Review/Submit** at the top. You will then see your interim report in its entirety.

If you need to make changes or edits, click **Back to Record** and update accordingly. Once you have reviewed all your information and have no other changes, click **Submit**. Select **Print** if you would like a printed copy of your interim report. You will receive an e-mail indicating that you have successfully submitted the report form.

Not ready to submit? Click **Back to Record** and **Save**. 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.