QUARTERLY PROGRAM REPORT WALKTHROUGH

A guide to completing a Quarterly Program Report in Egrants
This guide follows each step to complete a Quarterly Program Report in Egrants.

You may follow this walkthrough page by page or click on a step listed on the right of this slide for information on a specific step of the process.

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1. [Create a Program Report](#)
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CREATE A QUARTERLY REPORT IN EGRANTS

On the Main Menu, click the top menu item link which reads “To access an existing project (Grant Application, Continuation Application, Modification...) or create/update reports such as the Program Report, Fiscal Report, or Inventory Report (Project Management tab).”
On the right side of the Project Management Search page, you’ll see a menu titled Quick Searches. Click on the linked titled **Awarded Projects – Active**.
Information about your active grants will appear below the Search Criteria section. Click on the Grant ID link that matches the grant you are creating a report for.
On the Project Summary page, click the top menu item link which reads “To enter/update/view a Program, Fiscal, or Inventory Report for this grant (Monitoring menu item).”

Grant ID: 29999

Status: Open - Awarded

Project Title: Security Cameras and Sound Systems - Elementary
Fund Announcement: School Safety and Security Grant Program

PROJECT SUMMARY

CLICK HERE: To enter/update/view a Program, Fiscal, or Inventory Report for this grant (Monitoring menu item).
CLICK HERE: To view any Audit Information for this grant (Audit menu item).
CLICK HERE: To view the current financial information for this grant such as payments and funding sources (Fiscal Details menu item).
CLICK HERE: To view the reporting requirements for this grant such as when fiscal reports are due (Reporting Requirements menu item).

Select the document link to access the details (i.e. Budget, Main Summary, Contract report...).

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<tr>
<th>Phase</th>
<th>Documents</th>
<th>Start - End Dates</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>29999:</td>
<td>Create Project Modification Request (PMR)</td>
<td>11/1/2018 - 10/31/2019</td>
<td>Open - Awarded</td>
</tr>
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</table>

View Issues/Comments
On the Main Summary page, click the **Create Program Report** or **Create Fiscal Report** button to open the appropriate report page. Please click on the corresponding link below to continue the walkthrough:

**Quarterly Program Report Walkthrough**
**Final Program Report Walkthrough**
**[Fiscal Report Walkthrough]**

If the **Create Program Report** or **Create Fiscal Report** button does not appear, you will need to request the Program Creator and/or Fiscal Creator roles. The [Egrants Registration Walkthrough](#) includes directions on how to request these roles.
On the Program Report page, click the **down arrow of the dropdown menu** to indicate whether the project is on schedule.

- If the project is **on schedule**, please **select 'Yes' from the dropdown menu** and move on to the next slide.
- If the project is **not on schedule**, please **provide an explanation in the text field** provided directly below the question.
On the Program Report page, use the second text field provided to enter a brief description of the project activities conducted during the quarter.

Once complete, click the Attachments section located in the link in the Report Sections table.
In the Attachments section, click the **Save – Complete** button.

You are not required to attach any documents to your Quarterly Program Report, however if you want to upload documents to this section, you can do so by clicking the **Add Attachment** button.
On the Program Report page, click the **Performance Indicators** link in the Report Sections table.
On the Performance Indicators page, click the **Save – Complete** button.

The School Safety and Security Program does not require any Performance Indicators and this section should contain the two inactive sections highlighted above. If there are performance indicators in this section, they were established by the person who completed the grant application. Please defer to that person and your school entity’s records for detail on how to correctly respond to those indicators.
On the Program Report page, click the **Submit Report** button.
Confirm the submission of your report by reading the certification and clicking the **Agree** button.

After submission, your Quarterly Program Report will be reviewed by School Safety and Security program staff. You will receive notice from Egrants if there are any further actions required and when the Report is approved.

The following slides provide a walkthrough on how to complete a Final Program Report. Please do not follow the directions provided on the following slides unless you are completing a Final Program Report.
On the Program Report page, click the **down arrow of the dropdown menu** to indicate whether the project is on schedule.

- If the project is **on schedule**, please select ‘Yes’ from the dropdown menu and move on to the next slide.
- If the project is **not on schedule**, please provide an explanation in the **text field** provided directly below the question.
On the Program Report page, use the second text field provided to enter a brief description of the project activities conducted during the quarter.
On the Program Report page, click the **Make Final Report** button.
Click the Attachments link located in the link in the Report Sections table.

Program Report

Report Status: Draft
Approval Status: Pending
Status Updated By:

Report Due Date: 1/21/2019
Submitted Date:
Return Date:
Resubmitted Date:

Final Report: Yes
Make Periodic Report

Is The Project On Schedule? Yes
If not, please explain:

Briefly List Activities Conducted During This Period:
Bollards were purchased and installed in both of Sample School District's elementary schools. All project activities are now complete.

Report Sections

<table>
<thead>
<tr>
<th>Sections</th>
<th>Open Corrective Actions</th>
<th>Status</th>
<th>Last Update Date</th>
<th>Last Updated By</th>
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</thead>
<tbody>
<tr>
<td>Attachments</td>
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<td>In Process</td>
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<tr>
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<tr>
<td>Performance Indicators</td>
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<td>In Process</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View Report  Save as Draft  Submit Report  Delete  Cancel
In the Attachments section, click the **Save – Complete** button.

You are not required to attach any documents to your Quarterly Program Report, however if you want to upload documents to this section, you can do so by clicking the **Add Attachment** button.
On the Program Report page, click the Final Report link located in the Report Sections table.
Complete all **11 questions** of the Final Report survey. If the question does not apply to your grant project, select ‘No’ or type in ‘N/A’. Once finished, click the **Save – Complete** button.
On the Program Report page, click the Performance Indicators link in the Report Sections table.

![Program Report Image]

**Report Status:** Draft  
**Approval Status:** Pending

**Final Report:** Yes  
**Make Periodic Report**

**Is the Project On Schedule?** *Yes  
If not, please explain:*

**Briefly List Activities Conducted During This Period:** *Bollards were purchased and installed in both of Sample School District's elementary schools. All project activities are now complete.*

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<td>Performance</td>
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<td>In Process</td>
<td>9/26/2019</td>
<td></td>
</tr>
</tbody>
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**Report Due Date:** 1/21/2019  
**Submitted Date:**  
**Return Date:**  
**Resubmitted Date:**
On the Performance Indicators page, click the **Save – Complete** button.

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Use the links in the table of contents to the right to revisit any step of this walkthrough.

For additional grant guides and walkthroughs, please visit the [Grant Guides page of PCCD's website](#).

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