HOW TO COMPLETE AND SUBMIT PROGRESS REPORTS, EXPENDITURE LOGS, AND PAYMENT REQUESTS

Historic Preservation Grants Program
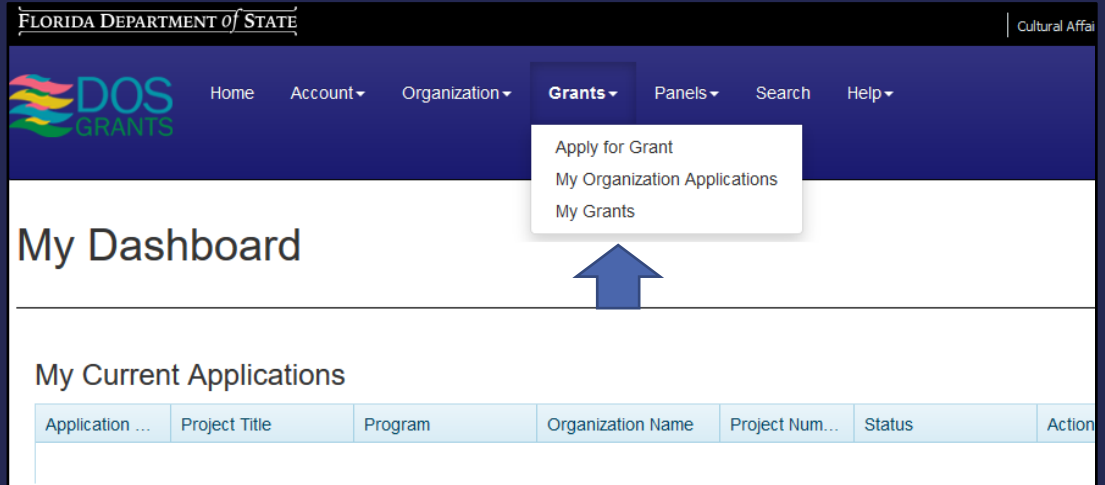
FLORIDA DEPARTMENT OF STATE / DIVISION OF
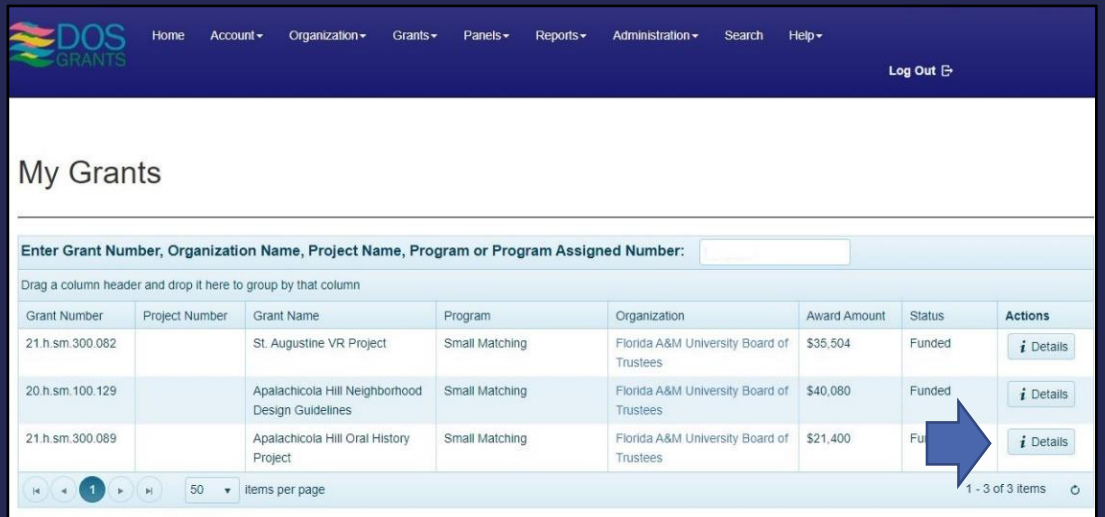
Historical Resources

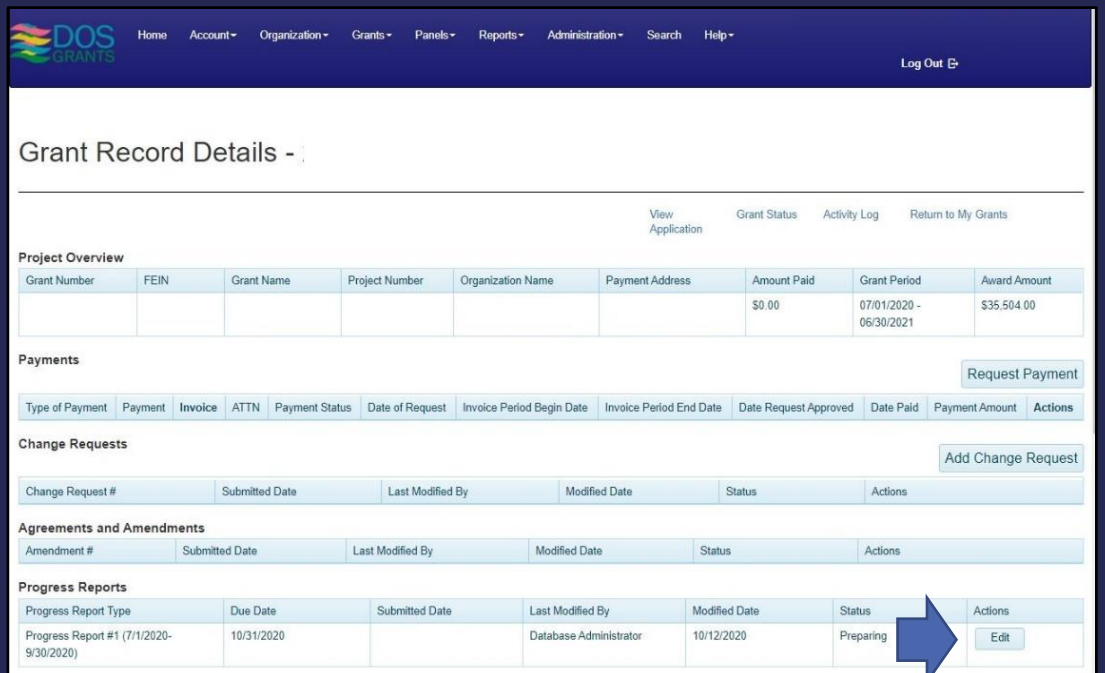# HOW TO COMPLETE A PROGRESS REPORT

ACCESSING THE PROGRESS REPORT

- Log into dosgrants.com
- From the "Grants" drop down menu at the top of the screen select "My Grants."

- Select "Details" next to the grant on which you are working.
- If you have multiple grants, they will all display here.

- To submit a required report, scroll down to the "Progress Reports" section and click the "Edit" button for the next report that is due.
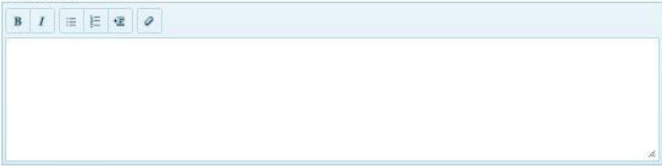
COMPLETING THE PROGRESS REPORT

- Complete each section of the report, including a narrative description of grant progress, uploading any supporting documentation, and updating your expenditure log as needed.

- Dosgrants functions best when text is typed directly into the text box. However, if you want to copy/paste text from another file, paste your response as plain text. You can do this by right clicking and choosing "Paste as Plain Text" or pressing Ctrl+Shift+V .

- Check the box to certify the report is accurate, provide your electronic signature, and, when you are ready, click "Submit" to complete the report.

HELPFUL TIPS FOR UPLOADING FILES

Upload relevant and detailed documentation related to your grant progress. These may include: photos, invoices, contracts, project plans, correspondence, etc.

- In order to upload documentation as evidence of your project progress:

  - Provide a title for the file.

  - Add a description of the file that will aid staff in reviewing it.

  - Click "Select files…" and select the file you want to upload.

  - To upload multiple files, save the report after each one to complete the upload and repeat this process.

- For photographic documentation, follow the Department's photo guidelines:

  - Provide a Key Plan showing the location and direction of each photograph.

  - Each photograph must be in color and high resolution.

  - Number each photograph. The number should correspond with the provided Key Plan.

  - Provide a caption with the photograph date (i.e. if the photo is pre-, mid- or post-project) and a brief description of what is shown.

  - A single file (e.g. PDF, DOC, PPT) with all photographs is encouraged. Photographs should be no more than two to a page.

SUBMITTING THE PROGRESS REPORT

· Once you click submit, you cannot edit your report unless Department of State staff returns it to you.

· If there are issues or questions about your progress report, staff may return the report to ask for additional information or clarification. Please update and re-submit the report promptly so that your organization remains in compliance with Department of State policies.

· You can check the status of your report on the Grant Record Details page.

HOW TO COMPLETE THE EXPENDITURE LOG

THE EXPENDITURE LOG

- **From the Grants menu, choose "My Grants" and select "Details" next to your current grant.**

- **Click "Edit Log" in the Forms and Reports section to access the Expenditure Log.**

- **Click "Add New Record" to begin adding expenditures.**

INPUTTING INFORMATION

The "Add Row" button will open a new box with fields in which to provide the following information per expense:

- **Invoice** –The number of the invoice provided by the Vendor.

- **Transaction** – A number corresponding to the payment transaction. You should also include the type of transaction, for example "Check 2058," "EFT 289," or "Debit 7338." **NOTE**: All expenditures need an Invoice or Transaction number but may not have both.

- **Payment Date** – In MM/DD/YYYY format. Provide the date the payment was made. Otherwise, the date on the invoice if no payment has been made.

- **Payee** – The name of the person or company to which the payment was made.

- **Transaction Total** – The total amount of the payment. For example, if paid as a check, the transaction total should reflect the full amount of the check. The transaction total must be greater than or equal to the combined Grant Funds, Cash Match, and In-Kind amounts.

- **Grant Funds** – The portion of the transaction being charged to the grant. This amount must be less than or equal to the Transaction Total.

- **Cash Match** – The portion of the transaction being used as match.

- **In-Kind Services** – The value of the in-kind goods or services provided as part of this expenditure.

- **Deliverable** – Choose the Deliverable number from your contract that this expenditure helped to complete. If an expenditure applies to multiple deliverables, select the most applicable.

- **Description** – Provide a brief description of what the expenditure was for.

When all information is entered, click "Update."

COMPLETING AND SUBMITTING
THE EXPENDITURE LOG

- Remember to look at your contract budget when completing your expenditure log. All of your expenditures must be allowable items that fit into the categories in your contract budget.

- Proofread the Expenditure Log to make sure everything is correct and all expenditures are allowable. Click "Submit" to turn in the expenditures marked as "New."

- After submitting your entries, your grant manager will review them. If there is an entry that is non-allowable, exceeds one of your contract budget categories, or has another issue, the individual expenditure can be returned to you. Approved expenditures will be locked, but a returned expenditure can be edited or deleted.

- You can click the "Export to Excel" button to save the log for your own records. Do not email the log to your grant manager.

- Use the Comments box to include information that may help your grant manager when reviewing and approving your submitted expenditure log entries.

Grant Funds Expenditure Log

Organization Name	Grant #	Award Amount	Date Completed
City of St. Augustine	21.h.sm.100.081	$50,000	7/6/2020 8:14:41 AM

Link to Contract Details

+ Add new record   Export to Excel

Drag a column header and drop it here to group by that column

Invoice	Transaction	Payment Date	Payee	Transaction To...	Grant Funds	Cash Match	In Kind	Budget Item	Description	Deliverable	Status		
1	Check 1001	8/1/2020	Provider	$2,000.00	$1,000.00	$900.00	$100.00	Applicant Cash - Grant Administration	Provider performed task x	1	New	Edit	Delete
2	Check 1002	9/7/2020	Provider	$3,000.00	$2,500.00	$500.00	$0.00	Applicant Cash - Cultural Resource Management Consultant with GIS	Provider performed task x	2	New	Edit	Delete
3	Check 1003	10/12/2020	Provider	$5,000.00	$5,000.00	$0.00	$0.00	Applicant Cash - Cultural Resource Management Consultant with GIS	Provider performed task y	2	New	Edit	Delete
				Total Transaction: $10,000.00	Total Grant Funds: $8,500.00	Total Cash Match: $1,400.00	Total In Kind: $100.00						

200 ▾ items per page   1 - 3 of 3 items

Comments:

Submit   ← Go Back

HOW TO COMPLETE A PAYMENT REQUEST

THE PAYMENT REQUEST

- From the Grants menu, choose "My Grants" and select "Details" next to the relevant grant.

- Before requesting a payment, make sure your Expenditure Log is up to date. For more information, see the Expenditure Log instructions.

- Click the "Request Payment" button.

INPUTTING INFORMATION

- **Invoice Period** - The invoice period should be within the grant period and cover the dates work for which payment is being requested was completed. The invoice period end date can be the day the payment request was submitted but it cannot be a future date.

- **ATTN** – Enter the name of the individual in your organization who should receive notification of payment disbursement.

- **Deliverable** - Confirm the relevant deliverable is selected. Payment may be requested for multiple completed deliverables at one time.

- **Upload Documentation** - Upload all documentation demonstrating completion of deliverables as specified in your Grant Award Agreement. If uploading multiple files, you should save after uploading each one.

- **Certification** - Check the box to certify you are authorized to request payments and type in your electronic signature. Then click "Submit." DOSGrants will require you to click "Submit" a second time.

AFTER PAYMENT SUBMISSION

Your payment request's status will change as the payment moves through the various stages of approval and eventual disbursement.

- **Preparing** – request has not yet been submitted to the Division for review.

- **Requested** – request has been submitted to the Division for review.

- **Approved** – request has been approved by the Division and sent to the Department of State's finance office for processing.

- **Vouchered** – payment has been authorized by the Department of State's finance office and sent to the Department of Financial Services for disbursement.

- **Paid** – payment has been issued by the Department of Financial Services.

- **Request for Information** – request has been returned for corrections or clarification and needs to be resubmitted.

You can check the status of your payment request on the Grant Record Details page.

Payments

Type of Payment	Payment	Invoice	ATTN	Payment Status	Date of Request	Invoice Period Begin Date	Invoice Period End Date	Date Request Approved	Date Paid	Payment Amount	Actions
Fixed Price	1	120h091	John Doe	Paid	05/19/2020	07/01/2019	05/20/2020	05/20/2020	06/05/2020	$15,000.00	▲ View
Fixed Price	2	220h091	John Doe	Requested	08/20/2020	07/01/2019	08/20/2020			$35,000.00	▲ Manage Request