



## Online Reporting Frequently Asked Questions

### ***General Reporting Questions***

**1. What if I need to update my organization's information as displayed in the online report?**

If any of your organization information needs updating, please access the "Update Organization Contact Information" section of the grantee portal and update the information.

**2. What if the original Project Contact recently left the organization and we no longer have access to the account associated with the online report?**

When that happens, please email the Foundation via [grants@coloradohealth.org](mailto:grants@coloradohealth.org) to let us know. We will have you create a profile for yourself, [here](#) and we will connect your account to the organization and appropriate grant records.

**3. I don't have access to my grant agreement and approved budget. How can I get a copy?**

These are located in the documents section of the grant record located in the Grants section of the portal. If they are not, please contact [grants@coloradohealth.org](mailto:grants@coloradohealth.org) and we will email you copies.

**4. What if I need more time to submit my report?**

We understand that things can come up! While we do expect that reports are submitted by the due date outlined in your grant agreement, please contact us at [grants@coloradohealth.org](mailto:grants@coloradohealth.org) if you expect a delay in your submission.

**5. Can you share example reports from real grantees?**

To uphold confidentiality with our grantees, we are unable to share reports from other organizations. We encourage you to refer to the Sample Report Guide that was created to give grantees an idea of the types of information and the appropriate level of detail needed.

**6. I have questions about when to submit an amendment to my grant. Who can I talk to?**

Refer to Section 2 of your grant agreement for guidelines on when a no-cost extension and budget revision requests are required. If you still are unsure or would prefer to discuss with someone, please contact [grants@coloradohealth.org](mailto:grants@coloradohealth.org) or your Program Officer.

**7. I have a requirement due that is not a progress or final report. How do I submit this?**

If you have a requirement due that is not a progress or final report, such as challenge grant documentation or a work plan, you will find it in the Upcoming Reports Section of the grantee portal, the type of documentation needed is listed in the record. You will upload and submit the requirement through the system.

**8. Can multiple people have access to review and edit a report?**

By default reports are accessible to the grant contact. Should you need an additional editor, we can provide access to one other contact. At most, two people will be able to see and edit a report. Contact us at [grants@coloradohealth.org](mailto:grants@coloradohealth.org) to request the additional contact.

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**Technical Questions**

**1. I am unable to log into my account with my email and password. What do I do?**

If you cannot remember your password, you can click the “Reset or Create a Password” link on the log in page. If further help is required, please contact us at [grants@coloradohealth.org](mailto:grants@coloradohealth.org).

**2. I am unable to edit my report. How can I edit it?**

When you first click on the report in the “Upcoming Reports” section, the report is not in edit mode. Click the “Edit” button at the top of the page.

**3. I filled out a majority of the report, but now when I log back into complete it, none of my prior work is there! What now?**

Unfortunately, if upon logging back into your account and the report, you do not see any of your previous work, the work was not saved. You will need to start over and make sure to save frequently throughout the process so you don't lose any of your hard work. You'll notice a “Save” button at the bottom of the screen. It is imperative that you select “Save” rather than “Cancel” when exiting. This will save information to your account so you can come back to the report form at a later time. We also recommend writing the sections in a word-processing document and copying and pasting them into the appropriate sections while Saving and Finishing throughout.

**4. Are there word limits to the responses that I provide?**

No, there are no word limits, but we ask that reports be concise and include only relevant information. We recommend providing 1-2 paragraphs per question.

**5. Is there a limit on the number of attachments that I can submit?**

We require three documents: your organization's most recent Balance Sheet, your

organization's most recent Income-Expense Statement, and the Actual Expenditure report (excel template that captures the grant's actual expenditures as compared to the approved budget included in your grant agreement). You will not be able to submit your report without attaching these documents.

If you wish to submit optional attachments, we ask that you submit only up to a few additional attachments. Examples include additional Evaluation results you would like to share, an amendment request, or pictures.

**6. What if I don't receive an email confirmation after I've submitted?**

The system should automatically send a confirmation to you after you've clicked on Review & Submit. Do check the "Submitted Reports" section of your grantee portal to ensure a report was submitted.

**7. What if I'm unable to submit my report online?**

If you are unable to complete the online report form, please contact [grants@coloradohealth.org](mailto:grants@coloradohealth.org) for assistance.