

GovGrants

Progress and Reconciliation Reporting for Service Providers Early Years and Child Care Services

Progress & Reconciliation Module

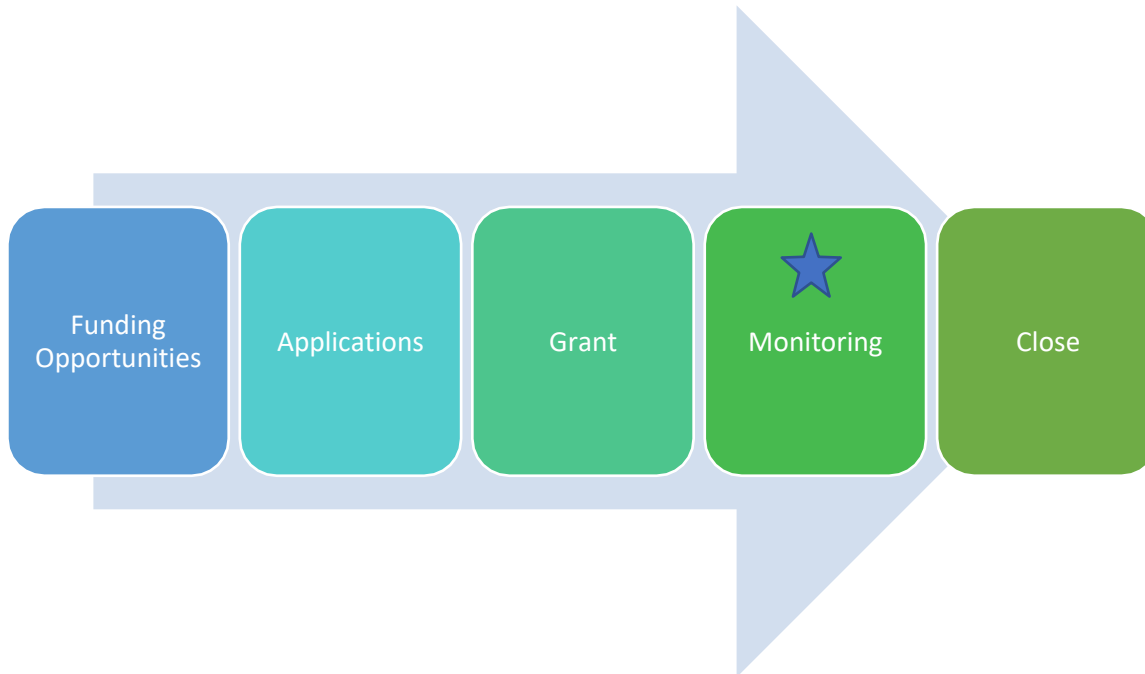
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Progress & Reconciliation Module

The Overview

The process of completing the Progress Report and the Reconciliation Report can be found in the Monitoring section of GovGrants.



*This package will cover the activities that take place in the Monitoring Module.

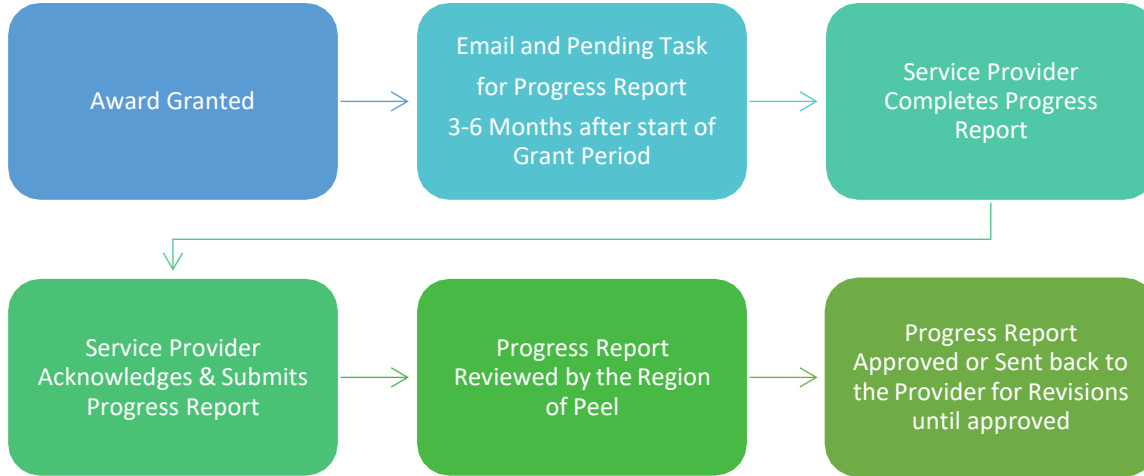
Overview

Once funds have been awarded, and the due date arrives, Progress Reports and Reconciliation Reports are automatically created within the system. The service provider will automatically get an email and a pending task in Gov Grants prompting them to complete the report. Service providers will have 30 days to complete these reports.

There are a couple of ways to access the generated Report. The external user can access the Progress or Reconciliation Report by going straight to the Award and selecting the Performance tab to view the Reports, or by going to the Monitoring Tab from the home page. This manual will show you how to access the reports using the Monitoring Tab.

Progress Reporting

The Process



Email Notification

The Provider will receive an email notification that the Progress Report needs to be completed.

Hello,

This email is to inform you that the progress report #PR--GT-GOOD-00002-01 has been created for the award #AD-GOOD-03. You are requested to complete and submit the progress report to the Region of Peel.

Progress Report Details:

Progress Report ID: PR--GT-GOOD-00002-01

Status: Created

Grant: GT-GOOD-00002

Award: AD-GOOD-03

Program Area: Human Services Department

Log in to GovGrants to complete the task.

Please do not reply to this email. You may contact the Region of Peel, if you have any questions or need assistance.

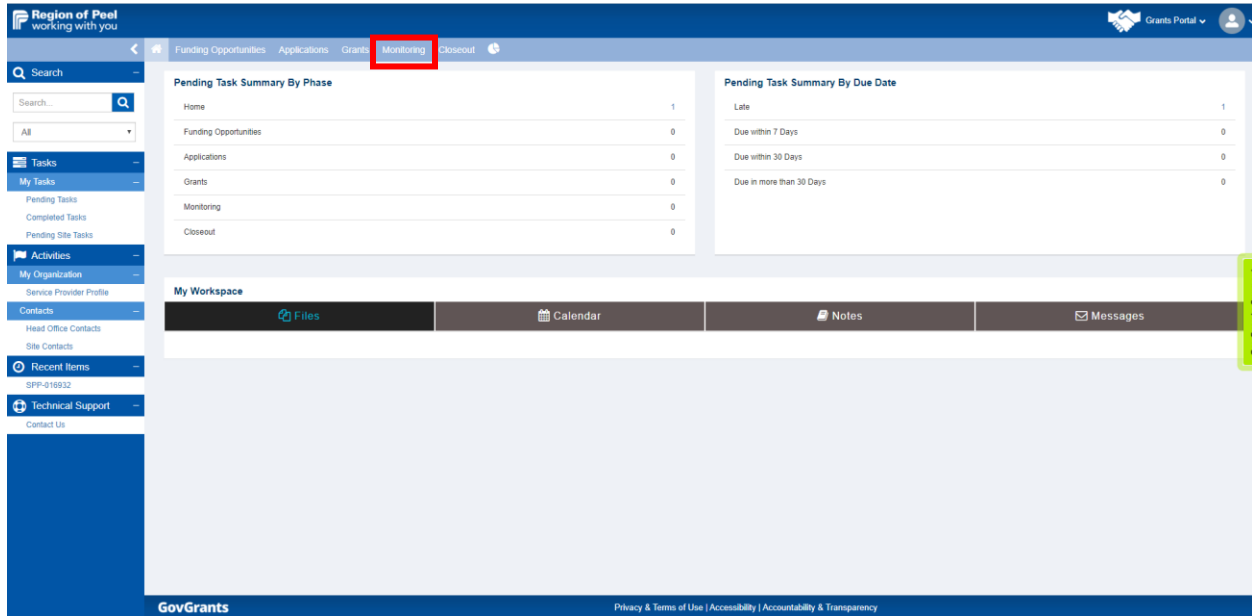
Thank you,
Region of Peel

Progress & Reconciliation Module

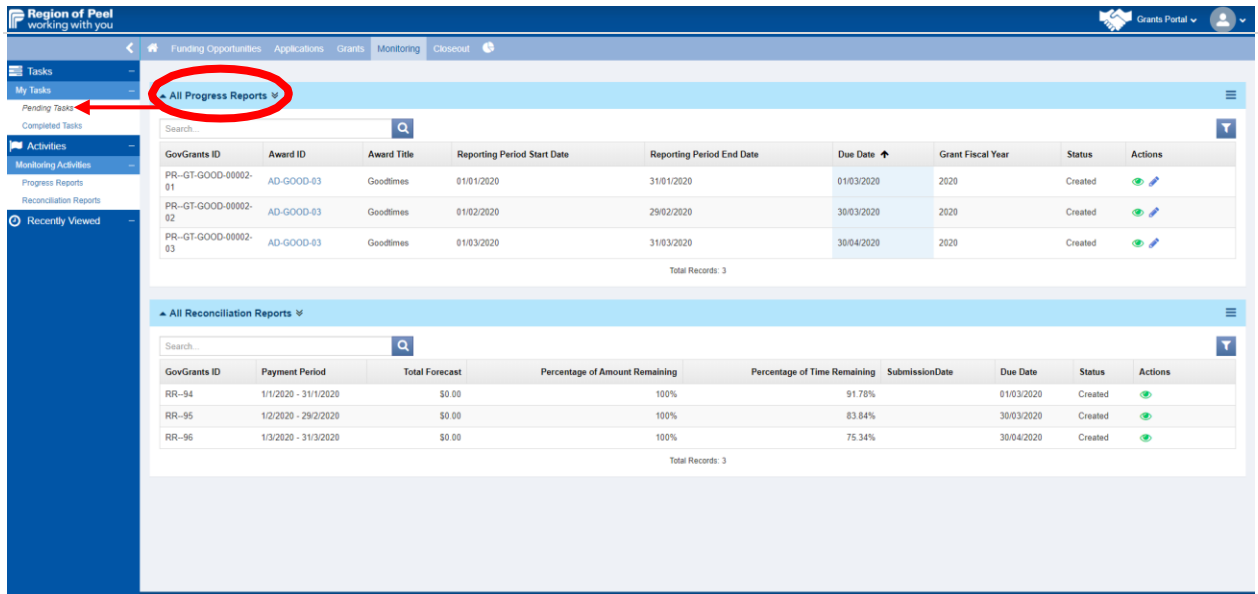
Finding the Progress Report

Progress Reports will automatically generate based upon their reporting period and due date. The provider will have 30 days to complete the report. You will receive a Pending Task in GovGrants prompting you to complete the Progress Report.

Log into GovGrants. Click on the **Monitoring** Tab at the top of the page.

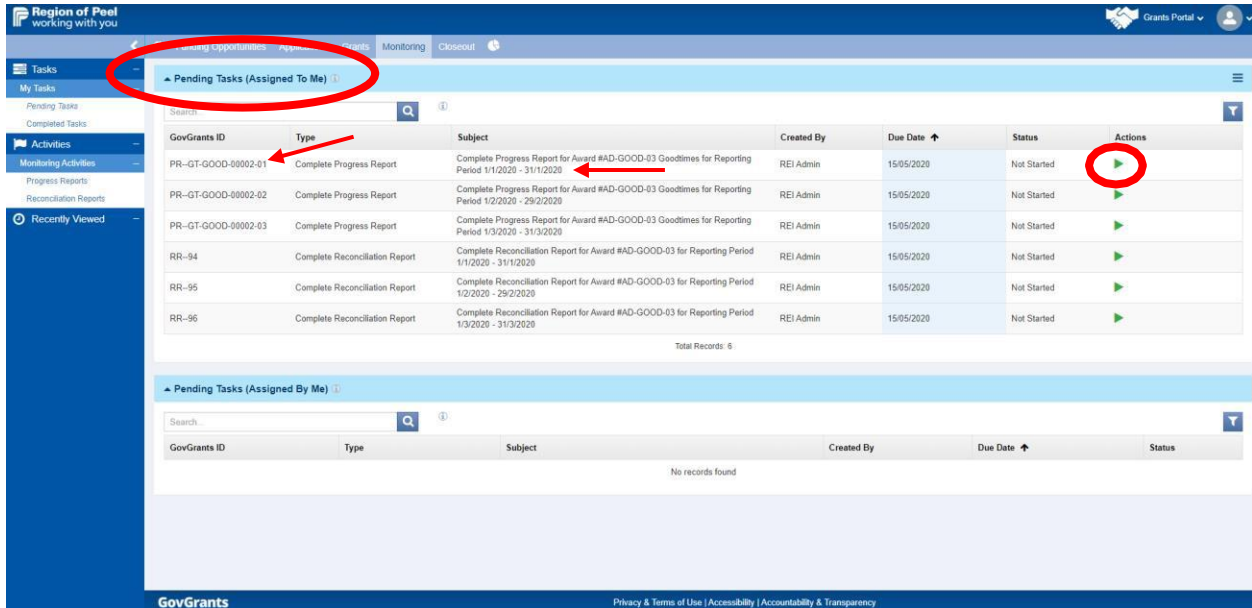


You will then notice a list of **All Progress Reports**. Click on **Pending Tasks** in the sidebar to find the Progress Report that you are required to complete.

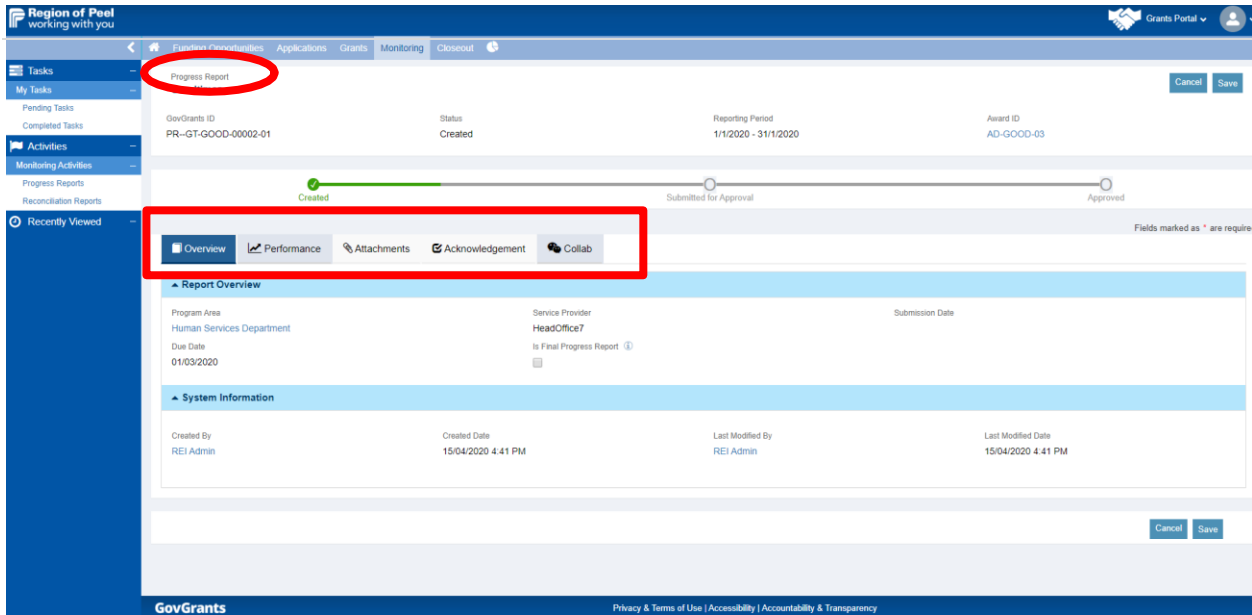


Progress & Reconciliation Module

A list of **Pending Tasks (Assigned to You)** will then appear. Search for the appropriate Progress Report by finding the correct GovGrants ID number (which was indicated in your notification email) and by the correct reporting period by date. Click the **green triangle** under the actions column to open and start the progress reporting process.



The Progress Report Page now opens. Notice that the Progress Report page has 5 tabs: Overview, Performance, Attachments, Acknowledgement and Collab Tab.



Progress & Reconciliation Module

Overview Tab

If this is the last or final progress report to be submitted for the year, click the **Final Progress Report** radio button. If it is not, leave this section unchecked.

The screenshot shows the 'Overview' tab of a progress report. At the top, there is a progress bar with three stages: 'Created' (checked), 'Submitted for Approval', and 'Approved'. Below the progress bar, there are tabs for 'Overview', 'Performance', 'Attachments', 'Acknowledgement', and 'Collab'. The 'Report Overview' section contains the following information:

Field	Value
Program Area	Human Services Department
Service Provider	AD-GOOD-03
Submission Date	
Due Date	01/03/2020
is Final Progress Report	<input checked="" type="checkbox"/>

The 'System Information' section contains the following information:

Field	Value
Created By	REI Admin
Created Date	15/04/2020 4:41 PM
Last Modified By	REI Admin
Last Modified Date	15/04/2020 4:41 PM

Performance Tab

This is where you will complete the details of your Progress Report. Click on the Performance Tab. Click the **pencil** edit icon.

The screenshot shows the 'Performance' tab of a progress report. The 'Performance Indicators' section contains a table with the following data:

GovGrants ID	Performance Indicator	Unit of Measurement	Previous Year Actual	Target	Previous Reported Actual	Year-to-Date-Actuals	Notes	Actions
KPI-0518	Number of Children Served	Number (#)	10.00	10.00	0.00	0.00		
KPI-0519	Number of Visits Made by Children	Number (#)	10.00	10.00	0.00	0.00		
KPI-0520	Number of Parents/Caregivers Served	Number (#)	10.00	10.00	0.00	0.00		
KPI-0521	Number of Visits Made by Parents/Caregivers	Number(#)	10.00	10.00	0.00	0.00		

Below the table, there is a 'Performance Narrative' section with a text area for providing a narrative in support of the progress (if applicable).

Progress & Reconciliation Module

Enter your **Year-to-Date-Actuals**. Enter any appropriate notes. Click the **Section Save**.

Region of Peel working with you

Grants Portal

Funding Opportunities Applications Grants Monitoring Closeout

Created Submitted for Approval Approved

Overview Performance Attachments Acknowledgement Collab

Fields marked as * are require

Save

Search...

* Records are sorted by Created Date ASC

GovGrants ID	Performance Indicator	Unit of Measurement	Previous Year Actual	Target	Previous Reported Actual	Year-to-Date-Actuals	Notes	Actions
KPI-0518	Number of Children Served	Number (#)	10.00	10.00	0.00	5		
KPI-0519	Number of Visits Made by Children	Number (#)	10.00	10.00	0.00	5		
KPI-0520	Number of Parents/Caregivers Served	Number (#)	10.00	10.00	0.00	5		
KPI-0521	Number of Visits Made by Parents/Caregivers	Number(#)	10.00	10.00	0.00	5		
Total Records: 4								

Performance Narrative

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Notice the green *Saved Successfully* message that appears.

Saved Successfully!

Performance Indicators

Search...

* Records are sorted by Created Date ASC

GovGrants ID	Performance Indicator	Unit of Measurement	Previous Year Actual	Target	Previous Reported Actual	Year-to-Date-Actuals	Notes	Actions
KPI-0518	Number of Children Served	Number (#)	10.00	10.00	0.00	5.00		
KPI-0519	Number of Visits Made by Children	Number (#)	10.00	10.00	0.00	5.00		
KPI-0520	Number of Parents/Caregivers Served	Number (#)	10.00	10.00	0.00	5.00		
KPI-0521	Number of Visits Made by Parents/Caregivers	Number(#)	10.00	10.00	0.00	5.00		
Total Records: 4								

Performance Narrative

Progress & Reconciliation Module

Enter a narrative in support of the progress report if applicable. Click **Save**.

The screenshot shows the 'Performance Indicators' section with a table of metrics and a 'Performance Narrative' section below it. The 'Performance Narrative' section is highlighted with a red box and contains a text input field with the placeholder text 'Provide a narrative in support of the progress (if applicable)'. A 'Save' button is also highlighted with a red box.

GovGrants ID	Performance Indicator	Unit of Measurement	Previous Year Actual	Target	Previous Reported Actual	Year-to-Date-Actuals	Notes	Actions
KPI-0515	Number of Children Served	Number (#)	10.00	10.00	0.00	5.00		
KPI-0519	Number of Visits Made by Children	Number (#)	10.00	10.00	0.00	5.00		
KPI-0520	Number of Parents/Caregivers Served	Number (#)	10.00	10.00	0.00	5.00		
KPI-0521	Number of Visits Made by Parents/Caregivers	Number (#)	10.00	10.00	0.00	5.00		

Total Records: 4

Performance Narrative

Provide a narrative in support of the progress (if applicable)

Cancel Save

Attachment Tab

Supporting Documents Checklist

Click on **Attachments Tab**. Should there be any mandatory documents that are required to be completed, these documents will be listed in the Supporting Documents Checklist section.

The screenshot shows the 'Region of Peel Grants Portal' interface. The 'Attachments' tab is selected, and the 'Supporting Documents Checklist' section is highlighted with a red oval. The checklist is currently empty, showing 'No Records Found'. Below the checklist is an 'Attachments' section, also empty, with an 'Add' button.

Region of Peel
working with you

Grants Portal

Tasks
My Tasks
Pending Tasks
Completed Tasks

Activities
Monitoring Activities
Progress Reports
Reconciliation Reports

Recently Viewed

Progress Report
Goodtimes

GovGrants ID: PR-GT-GOOD-00002-02
Status: Created
Reporting Period: 1/2/2020 - 29/2/2020
Award ID: AD-GOOD-03

Created Submitted for Approval Approved

Overview Performance Attachments Acknowledgement Collab

Supporting Documents Checklist

Description	Required	Status	Template Download Link	Document Upload Link
No Records Found				

Attachments

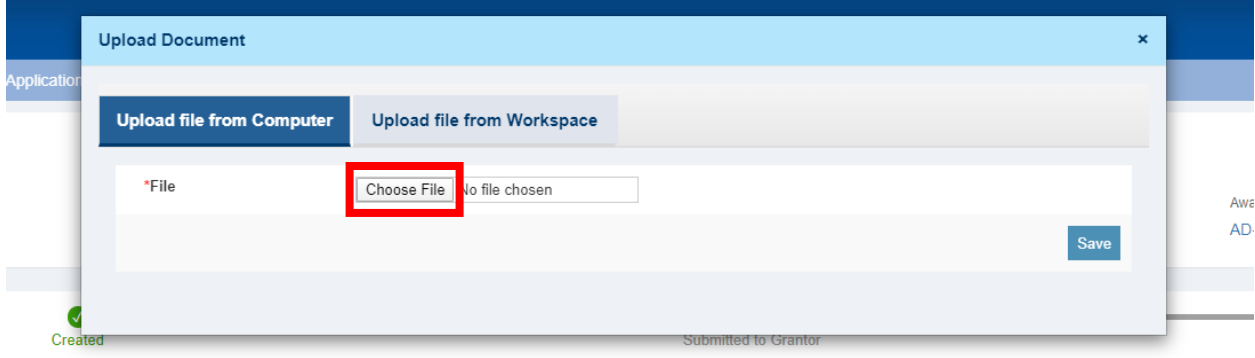
Attachment Name	Classification	Description	Last Modified Date	Created By
No records found				

Cancel Save

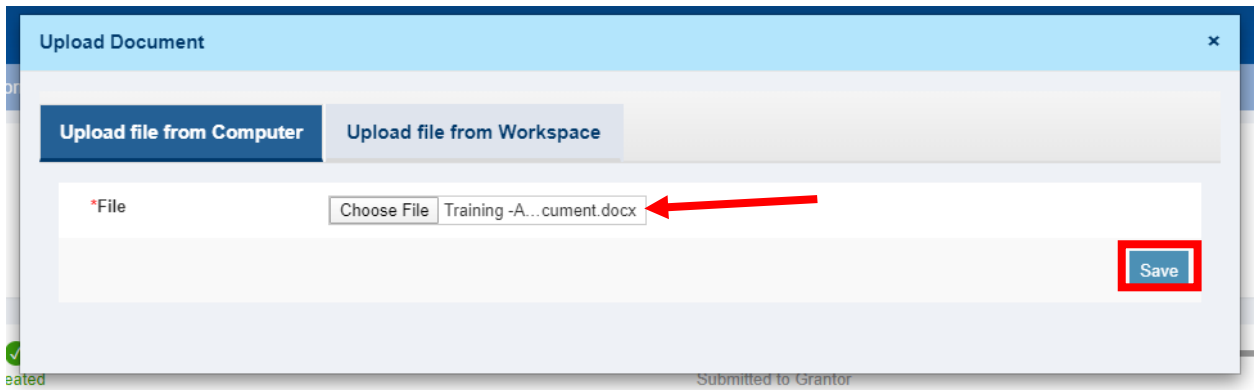
Progress & Reconciliation Module

Uploading Supporting Documents

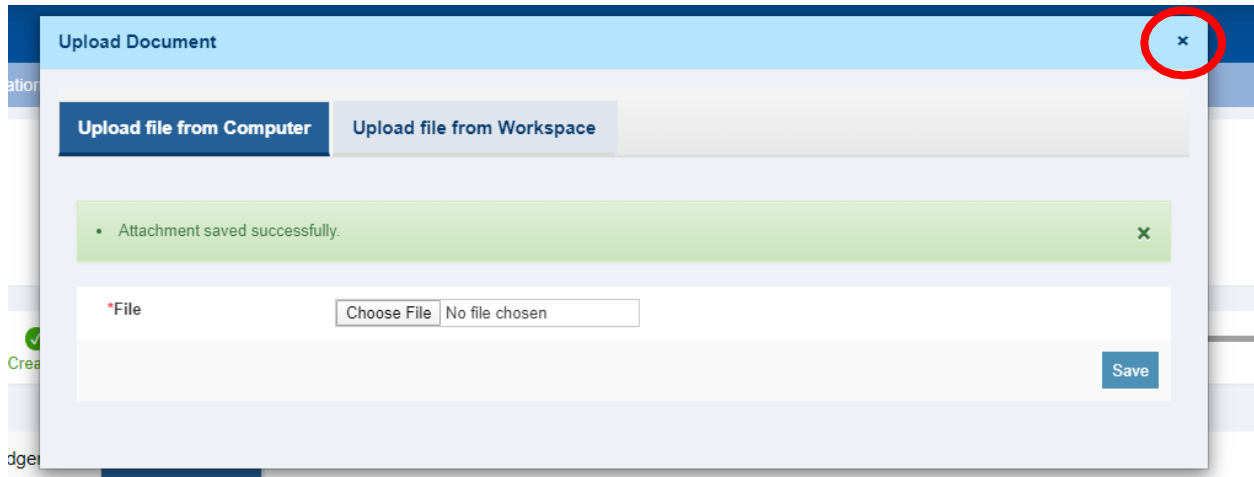
Click on the **blue cloud** icon next to the file you are to upload; click on choose file; choose your document from your computer; click open.



The file has now been uploaded. Click **Save**.



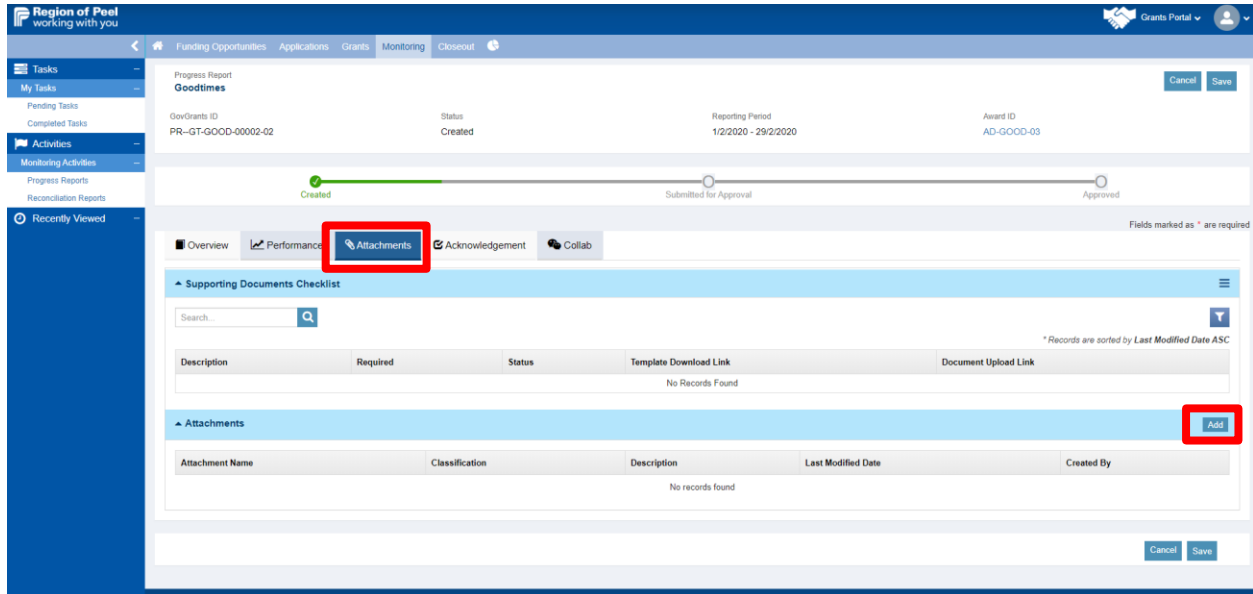
You will see the green *Saved Successfully* confirmation message. Click the X to exit the modal window.



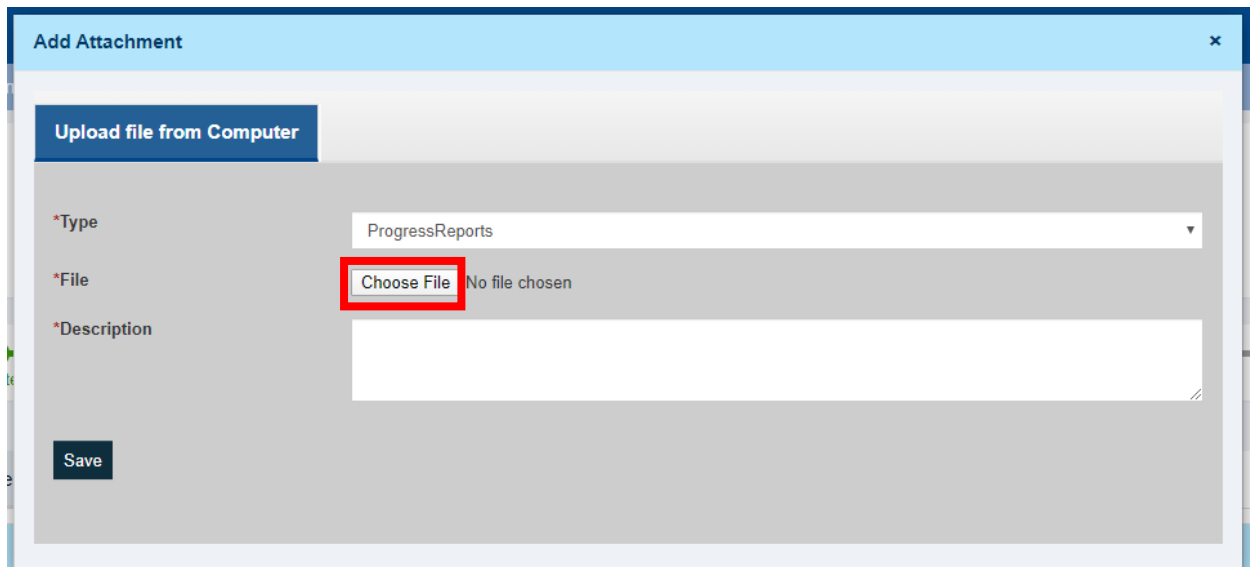
Progress & Reconciliation Module

Adding An Attachment

Should you need to attach a document to your report, complete the following steps. Click on the Attachments tab. Click the **Add** button in the Attachments section.

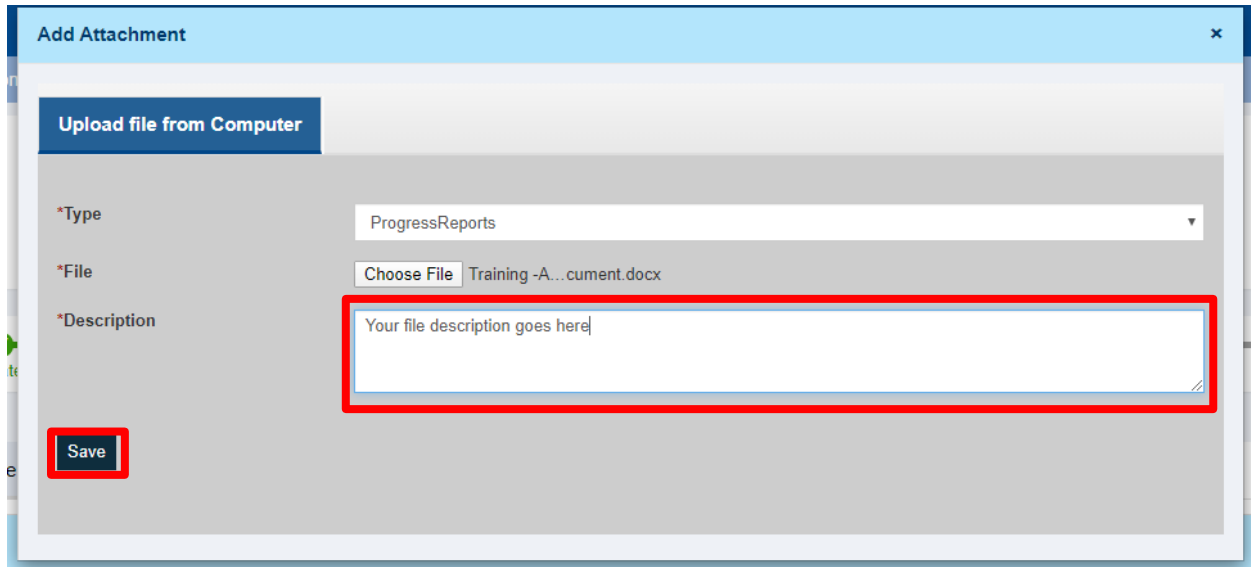


The **Add attachment** modal window will appear. Click **Choose File**. Find the file from your computer, choose the file and click **Open**.



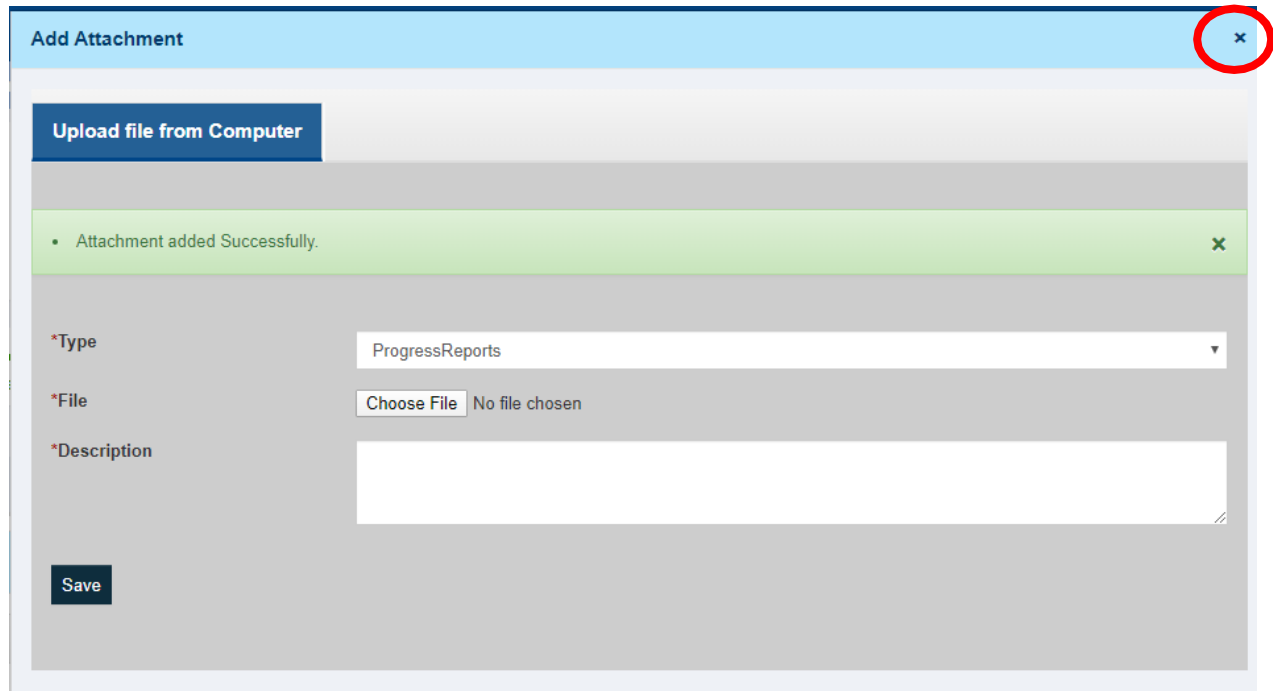
Progress & Reconciliation Module

This will then take you back to the modal window. Write your description of the document in the **Description box**. Click **Save**.



The screenshot shows the 'Add Attachment' modal window. At the top, there is a blue header with the title 'Add Attachment' and a close button (X). Below the header is a dark blue button labeled 'Upload file from Computer'. The form contains three main sections: '*Type' with a dropdown menu set to 'ProgressReports'; '*File' with a 'Choose File' button and the text 'Training -A...cument.docx'; and '*Description' with a text area containing the placeholder text 'Your file description goes here'. A red box highlights the 'Save' button at the bottom left.

Notice the green *Attachment added Successfully* confirmation will appear. Click on the **X** to close the page.



The screenshot shows the 'Add Attachment' modal window after a successful upload. A green notification bar at the top displays the message 'Attachment added Successfully.' with a close button (X). The form fields are: '*Type' dropdown set to 'ProgressReports'; '*File' field with a 'Choose File' button and the text 'No file chosen'; and an empty '*Description' text area. The 'Save' button is at the bottom left. A red circle highlights the close button (X) in the top right corner of the modal window.

Progress & Reconciliation Module

Your attachment has now been added and the orange download icon now appears.

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Funding Opportunities Applications Grants Monitoring Closeout

Tasks
My Tasks
Pending Tasks
Completed Tasks
Activities
Monitoring Activities
Progress Reports
Reconciliation Reports
Recently Viewed

Progress Report
Goodtimes [Cancel] [Save]

GovGrants ID: PR-GT-GOOD-00002-01 Status: Created Reporting Period: 1/1/2020 - 31/1/2020 Award ID: AD-GOOD-03

Created Submitted for Approval Approved

Overview Performance Attachments Acknowledgement Collab

Attachments [Add]

Attachment Name	Classification	Description	Last Modified Date	Created By	Action
ProgressReports		Your file description goes here	21/04/2020 2:45 PM	GovGrants Site Guest User	

Supporting Documents Checklist

Search... [Search]

* Records are sorted by Last Modified Date ASC

Description	Required	Status	Template Download Link	Document Upload Link
No Records Found				

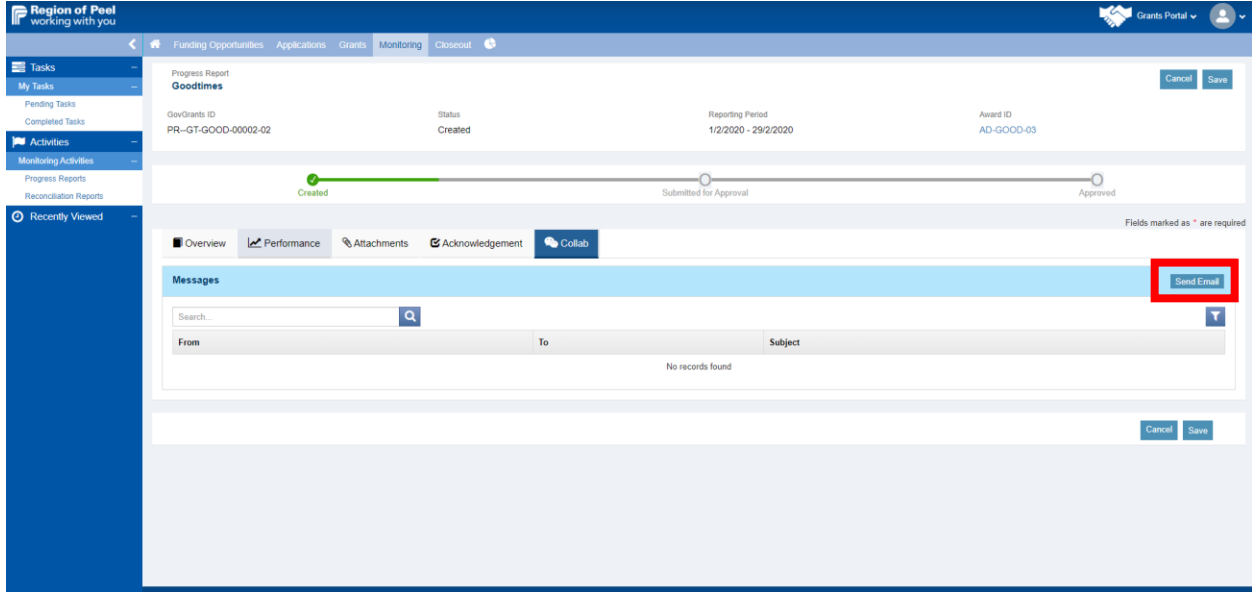
[Cancel] [Save]

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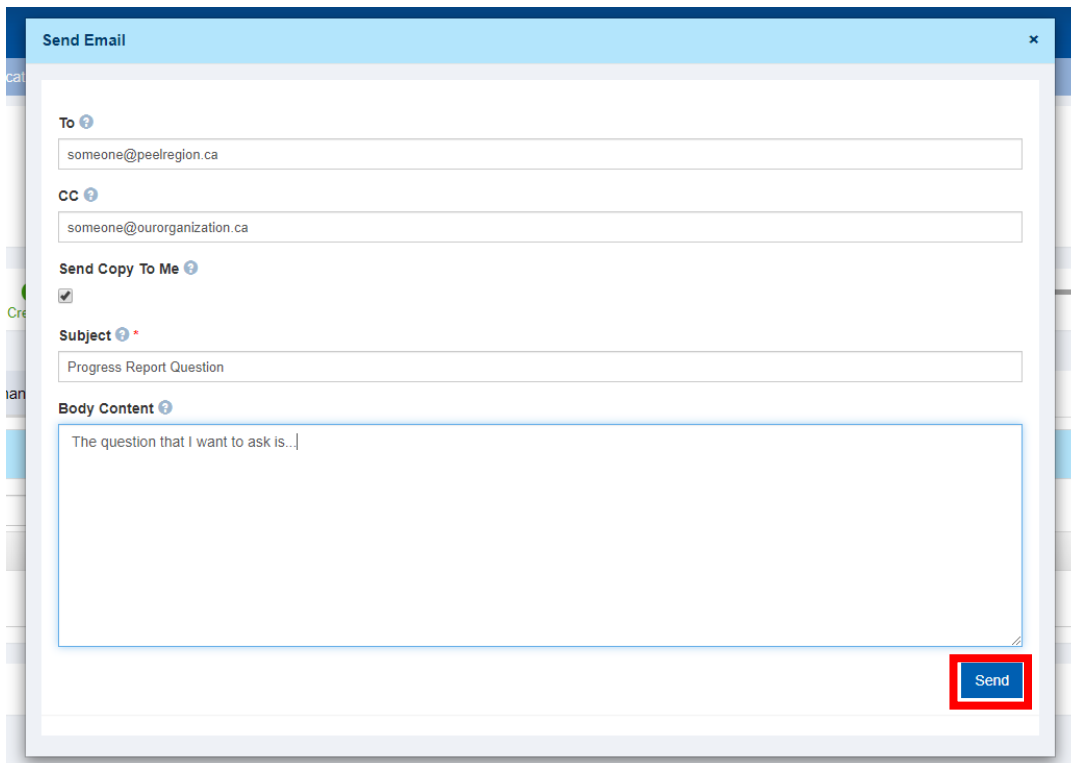
Progress & Reconciliation Module

Collab Tab

Use the Collab Tab to send an email to someone within GovGrants. A copy of the email will be saved in GovGrants. To create an email click on **Send Email**.



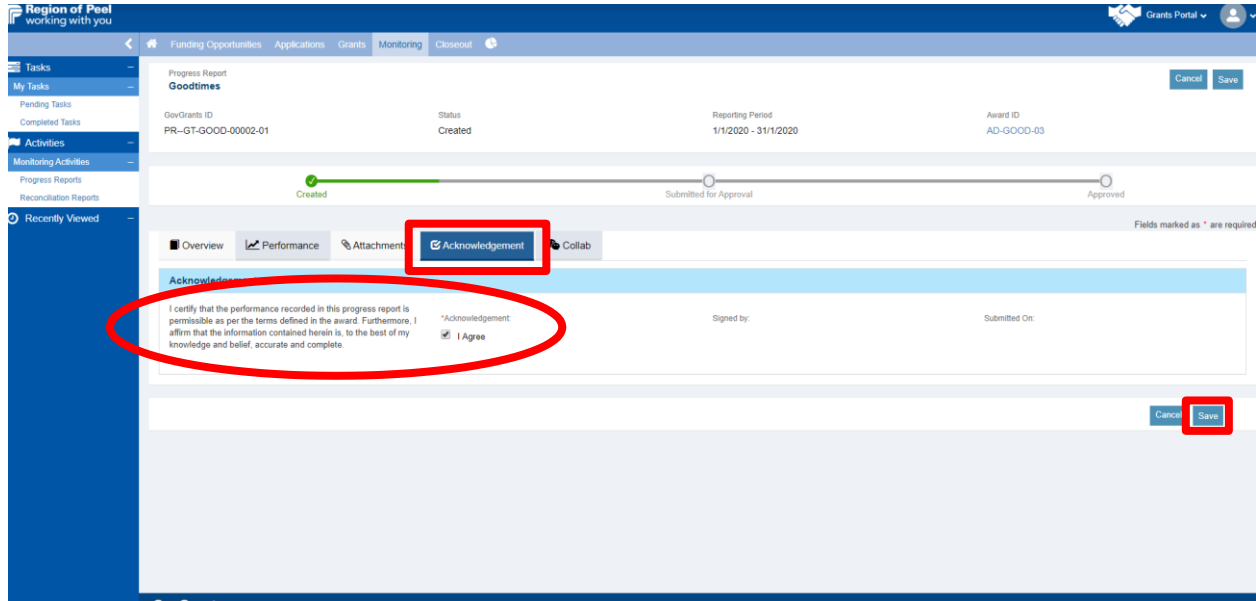
A modal window will appear. Complete all fields and then click **Send**.



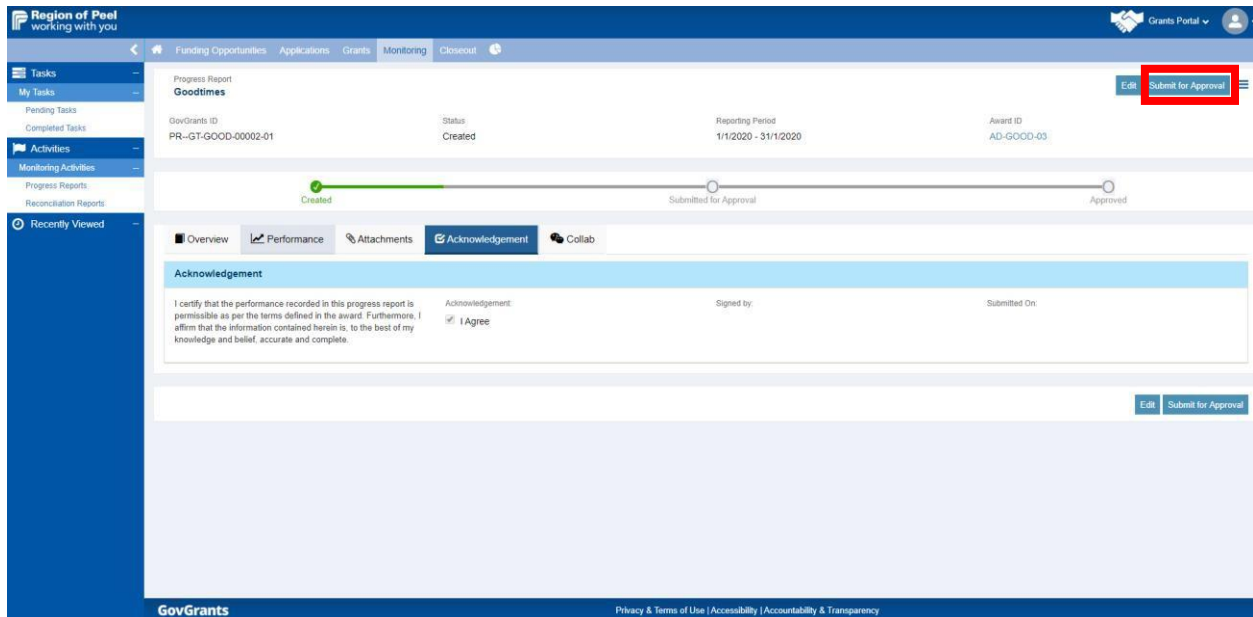
Progress & Reconciliation Module

Acknowledgement Tab

Click on the Acknowledgement tab. Read the Acknowledgement. Click the "I Agree" radio button. Click Save.



Review each tab of the Progress Report to ensure everything is correct. Click the **Submit for Approval** button. Once this button is clicked, you will no longer be able to make any further changes to the Progress Report.



Progress & Reconciliation Module

The Progress Report has now been submitted to The Region of Peel for approval. Notice the change in the status bar.

The screenshot displays the 'Region of Peel' Grants Portal interface. The main content area shows a 'Progress Report' for 'Goodtimes' with the following details:

- GovGrants ID: PR--GT-GOOD-00002-01
- Status: Submitted for Approval
- Reporting Period: 1/1/2020 - 31/1/2020
- Award ID: AD-GOOD-03

A progress bar below these details shows three stages: 'Created', 'Submitted for Approval' (circled in red), and 'Approved'. Below the progress bar, there is an 'Acknowledgement' section with a text box containing a declaration and a signature field.

Acknowledgement

I certify that the performance recorded in this progress report is permissible as per the terms defined in the award. Furthermore, I affirm that the information contained herein is, to the best of my knowledge and belief, accurate and complete.

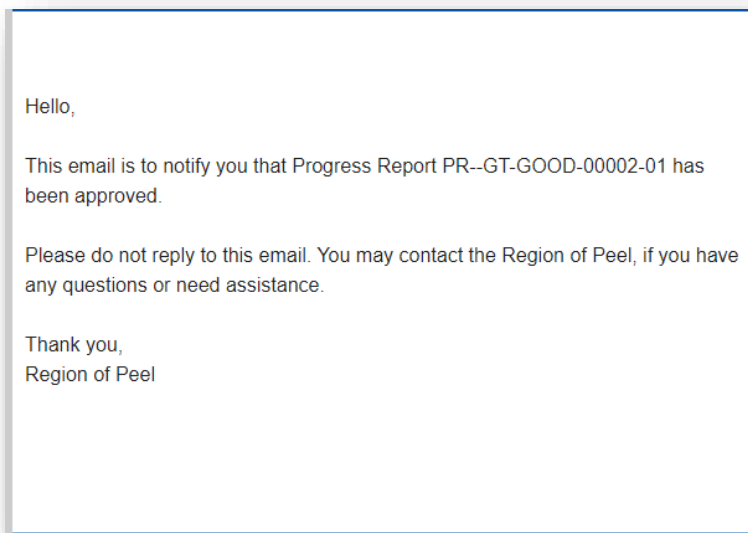
Acknowledgement: I Agree

Signed by: HeadsOffice7 Training

Submitted On: 22/04/2020

Progress Report Approved

Once the Region of Peel has approved the Progress Report, the provider will receive an email stating that it has been approved.



Progress & Reconciliation Module

Once the Progress Report is approved, it will appear in the **Approved Progress Reports** section of GovGrants. To navigate to this section, click on the Monitoring Tab and choose **Approved Progress Reports** from the dropdown list.

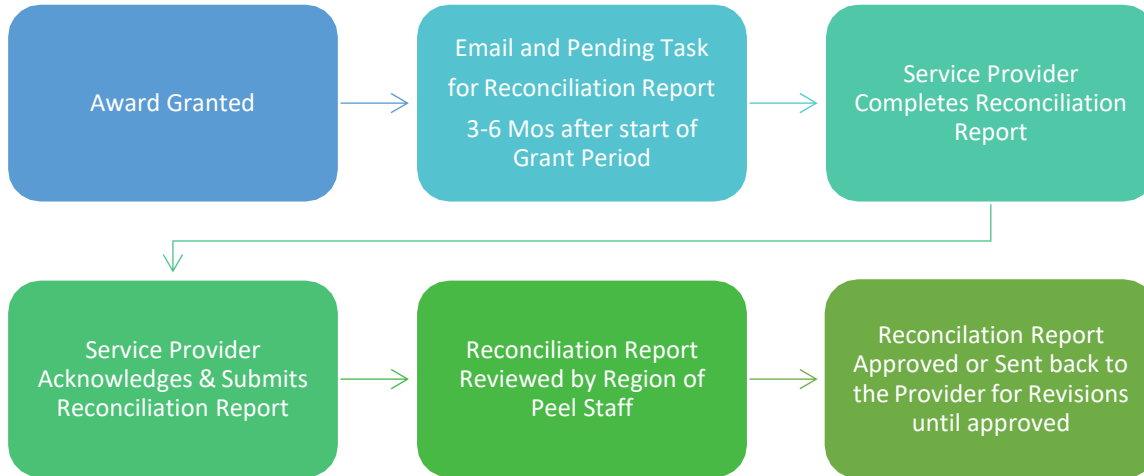
The screenshot displays the 'Monitoring' tab in the GovGrants system. The left sidebar shows navigation options: Tasks, My Tasks, Monitoring Activities, Progress Reports, Reconciliation Reports, and Recently Viewed. The main content area is divided into two sections:

- Approved Progress Reports:** A table with columns: GovGrants ID, Award ID, Reporting Period Start Date, Reporting Period End Date, Due Date, Grant Fiscal Year, Status, and Actions. A dropdown menu is open over the 'Approved Progress Reports' option, showing 'Created Progress Reports', 'Submitted Progress Reports', 'Approved Progress Reports', and 'All Progress Reports'. One record is visible with status 'Approved'.
- All Reconciliation Reports:** A table with columns: GovGrants ID, Payment Period, Total Forecast, Percentage of Amount Remaining, Percentage of Time Remaining, SubmissionDate, Due Date, Status, and Actions. It lists six records with various statuses like 'Submitted to Grantor' and 'Created'.

Notes:

Reconciliation Reporting

The Process



Email Notification

The Provider will receive an email notification that the Reconciliation Report needs to be completed.

Hello HeadOffice7,

This email is to inform you that the reconciliation report RR--94 for award Goodtimes has been created. You are requested to complete and submit the reconciliation report to the Region of Peel.

Log in to GovGrants to complete the task.

Please do not reply to this email. You may contact the Region of Peel, if you have any questions or need assistance.

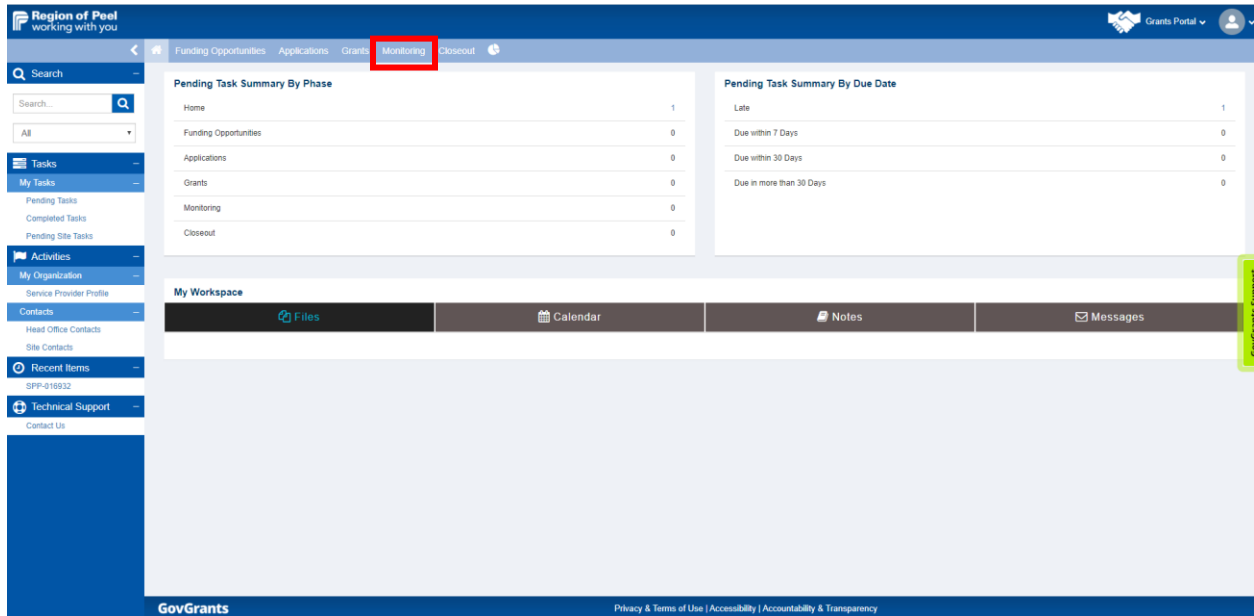
Thank you,
Region of Peel

Progress & Reconciliation Module

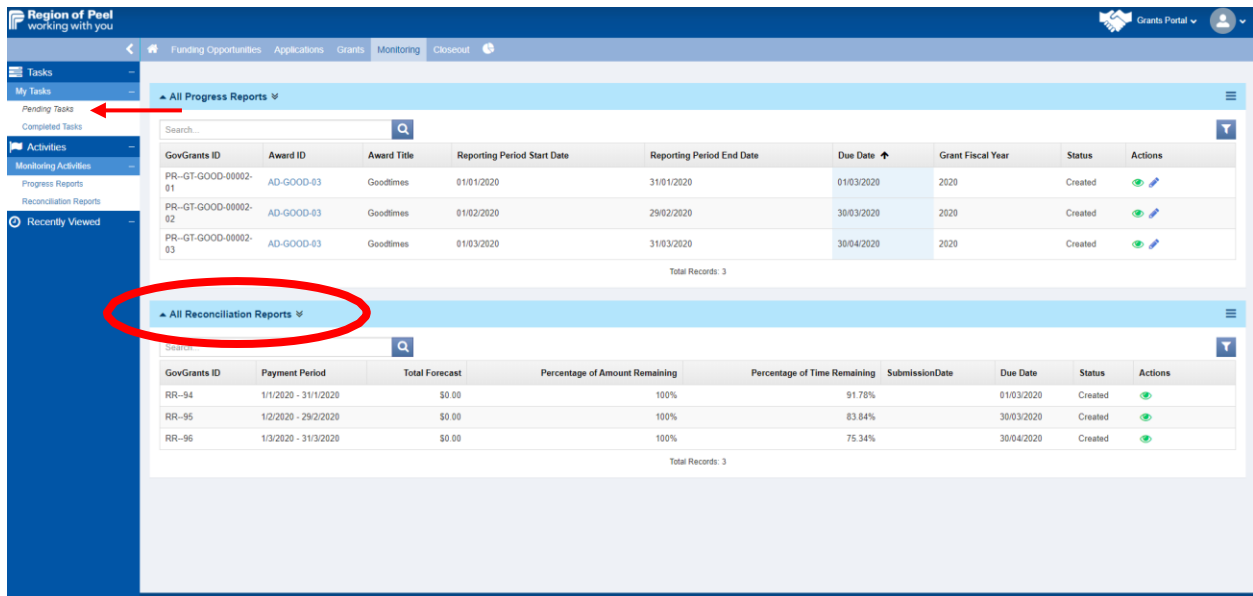
Finding the Reconciliation Report

Reconciliation Reports will automatically generate based upon their reporting period and due date. The provider will have 30 days to complete and submit the report. You will receive a Pending Task in GovGrants prompting you to complete the Reconciliation Report.

Log into GovGrants. Click on the **Monitoring** Tab at the top of the page.



You will then notice a list of All Reconciliation Reports. Click on **Pending Tasks** in the sidebar.



Progress & Reconciliation Module

Search for the appropriate Reconciliation Report by finding the correct Reporting period by date. Click the **green triangle** under the actions column to open and start the reconciliation reporting process.

GovGrants ID	Type	Subject	Created By	Due Date	Status	Actions
PR-GT-GOOD-00002-01	Complete Progress Report	Complete Progress Report for Award #AD-GOOD-03 Goodtimes for Reporting Period 1/1/2020 - 31/1/2020	REI Admin	15/05/2020	Not Started	▶
PR-GT-GOOD-00002-02	Complete Progress Report	Complete Progress Report for Award #AD-GOOD-03 Goodtimes for Reporting Period 1/2/2020 - 29/2/2020	REI Admin	15/05/2020	Not Started	▶
PR-GT-GOOD-00002-03	Complete Progress Report	Complete Progress Report for Award #AD-GOOD-03 Goodtimes for Reporting Period 1/2/2020 - 31/3/2020	REI Admin	15/05/2020	Not Started	▶
RR-94	Complete Reconciliation Report	Complete Reconciliation Report for Award #AD-GOOD-03 for Reporting Period 1/1/2020 - 31/1/2020	REI Admin	15/05/2020	Not Started	▶
RR-95	Complete Reconciliation Report	Complete Reconciliation Report for Award #AD-GOOD-03 for Reporting Period 1/2/2020 - 29/2/2020	REI Admin	15/05/2020	Not Started	▶
RR-96	Complete Reconciliation Report	Complete Reconciliation Report for Award #AD-GOOD-03 for Reporting Period 1/3/2020 - 31/3/2020	REI Admin	15/05/2020	Not Started	▶

This will bring you to the Reconciliation Page. Notice this page has 3 tabs: Overview, Acknowledgement and Attachments.

Service Provider	Program Area	Submission Date
HeadOffice7	Human Services Department	

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$193,000.00	
Staff Travel Expenses	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,000.00	

Progress & Reconciliation Module

Overview Tab

Review the **Reconciliation Report Information** section.
Scroll down to the **Budget Reconciliation** section.
Click on the **pencil icon** to edit each budget line.

The screenshot shows the 'Reconciliation Report Information' section with the following data:

Service Provider: HeadOffice7	Program Area: Human Services Department	Submission Date:
Due Date: 01/03/2020	Award Amount: \$222,000.00	Award Amount Balance: \$222,000.00
Total Paid-to-Date: \$0.00	Total Spent-to-Date: \$0.00	Variance: \$0.00
Percentage of Amount Remaining: 100.00%	Percentage of Time Remaining: 91.78%	

The 'Budget Reconciliation' section contains a table with the following data:

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$193,000.00	[Pencil Icon]
Staff Travel Expenses	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,000.00	[Pencil Icon]
Program Related Supplies and Resources	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	[Pencil Icon]
Professional Development and Training	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	[Pencil Icon]
Total Records: 4							

Input the amount spent this period and the Projected Spending for Remaining Periods.
Click the Section **Save**.

The screenshot shows the 'Budget Reconciliation' section with the following data:

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	40,000.00	153,000.00	\$0.00	\$193,000.00	[Pencil Icon]
Staff Travel Expenses	\$9,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$9,000.00	[Pencil Icon]
Program Related Supplies and Resources	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	[Pencil Icon]
Professional Development and Training	\$10,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10,000.00	[Pencil Icon]
Total Records: 4							

The 'Save' button is highlighted in a red box.

Progress & Reconciliation Module

Enter Each Line item. Click **Save**.

Reconciliation Report Information

Service Provider: HeadOffice7	Program Area: Human Services Department	Submission Date:
Due Date: 01/03/2020	Award Amount: \$222,000.00	Award Amount Balance: \$222,000.00
Total Paid-to-Date: \$0.00	Total Spent-to-Date: \$0.00	Variance: \$0.00
Percentage of Amount Remaining: 100.00%	Percentage of Time Remaining: 91.78%	

Budget Reconciliation

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$193,000.00	
Staff Travel Expenses	\$9,000.00	\$0.00	1,200.00	7,800.00	\$0.00	\$9,000.00	
Program Related Supplies and Resources	\$10,000.00	\$0.00	6,500.00	3,500.00	\$0.00	\$10,000.00	
Professional Development and Training	\$10,000.00	\$0.00	350.00	9,650.00	\$0.00	\$10,000.00	

Budget Reconciliation Narrative

Budget Reconciliation Narrative

Each time you save, you will get a green **Save Successfully** message. Scroll down to the **Budget Reconciliation Narrative** Section.

Budget Reconciliation

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	\$40,000.00	\$153,000.00	\$193,000.00	\$0.00	
Staff Travel Expenses	\$9,000.00	\$0.00	\$1,200.00	\$7,800.00	\$9,000.00	\$0.00	
Program Related Supplies and Resources	\$10,000.00	\$0.00	\$6,500.00	\$3,500.00	\$10,000.00	\$0.00	
Professional Development and Training	\$10,000.00	\$0.00	\$350.00	\$9,650.00	\$10,000.00	\$0.00	

Total Records: 4

Budget Reconciliation Narrative

Budget Reconciliation Narrative

Created By: REI Admin | Created Date: 15/04/2020 4:41 PM | Last Modified By: REI Admin | Last Modified Date: 15/04/2020 4:41 PM

Progress & Reconciliation Module

Enter your budget narrative.

Note: After entering the budget narrative, scroll to the bottom of the page and click **Save**.

The screenshot shows the 'Budget Reconciliation' section of the Region of Peel Grants Portal. It features a table with the following data:

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	\$40,000.00	\$153,000.00	\$193,000.00	\$0.00	
Staff Travel Expenses	\$9,000.00	\$0.00	\$1,200.00	\$7,800.00	\$9,000.00	\$0.00	
Program Related Supplies and Resources	\$10,000.00	\$0.00	\$6,500.00	\$3,500.00	\$10,000.00	\$0.00	
Professional Development and Training	\$10,000.00	\$0.00	\$350.00	\$9,650.00	\$10,000.00	\$0.00	
Total Records: 4							

Below the table is a section for 'Budget Reconciliation Narrative' with a text input field containing the placeholder text: 'This would be the section to include any budget explanations'. At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

Review your work. Should it require any edits, scroll to the top or the bottom of the page and click the **Edit** button then proceed to edit the section required.

This screenshot shows the same 'Budget Reconciliation' page but with summary statistics at the top:

Total Paid-to-Date	\$0.00	Total Spent-to-Date	\$48,050.00	Variance	(\$48,050.00)
Percentage of Amount Remaining	78.36%	Percentage of Time Remaining	91.78%		

The 'Budget Reconciliation Narrative' section now contains the text: 'This would be the section to include any budget explanations.' At the bottom right, there are 'Edit' and 'Submit for Approval' buttons, with the 'Edit' button highlighted by a red box.

Progress & Reconciliation Module

The pencils will then reappear allowing you to click them and edit the line items that require revision.

Note: Remember to first click the **section save** and then scroll to the top or bottom of the page and click the **page save**.

Budget Reconciliation

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent	Actions
Salaries and Benefits	\$193,000.00	\$0.00	30,000	163,000	\$193,000.00	\$0.00	
Staff Travel Expenses	\$9,000.00	\$0.00	\$1,200.00	\$7,800.00	\$9,000.00	\$0.00	
Program Related Supplies and Resources	\$10,000.00	\$0.00	\$6,500.00	\$3,500.00	\$10,000.00	\$0.00	
Professional Development and Training	\$10,000.00	\$0.00	\$350.00	\$9,650.00	\$10,000.00	\$0.00	
Total Records 4							

Budget Reconciliation Narrative

Budget Reconciliation Narrative
This would be the section to include any budget explanations.

System Information

Created By REJ Admin	Created Date 15/04/2020 4:41 PM	Last Modified By HeadOffice7 Training	Last Modified Date 17/04/2020 9:52 AM
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Scroll to the top of the page. Click **Edit**.

Reconciliation Report

GovGrants ID: RR-94 | Status: Created | Reporting Period: 1/1/2020 - 31/1/2020 | Award ID: AD-GOOD-03

Progress: Created (100%) | Submitted to Grantor (0%) | Approved (0%)

Reconciliation Report Information

Service Provider HeadOffice7	Program Area Human Services Department	Submission Date
Due Date 01/03/2020	Award Amount \$222,000.00	Award Amount Balance \$222,000.00
Total Paid-to-Date \$0.00	Total Spent-to-Date \$38,050.00	Variance (\$38,050.00)
Percentage of Amount Remaining 82.86%	Percentage of Time Remaining 91.78%	

Budget Reconciliation

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent
Salaries and Benefits	\$193,000.00	\$0.00	\$30,000.00	\$163,000.00	\$193,000.00	\$0.00
Staff Travel Expenses	\$9,000.00	\$0.00	\$1,200.00	\$7,800.00	\$9,000.00	\$0.00

Attachment Tab

Supporting Documents Checklist

Click the **Attachments** Tab. Should there be any documents that are required to be completed, these documents will be listed in the Supporting Documents Checklist section.

The screenshot displays the 'Region of Peel working with you' Grants Portal. The main content area is titled 'Reconciliation Report caterpillar'. A progress bar shows the report is in the 'Created' stage. The 'Attachments' tab is selected and highlighted with a red box. Below it, the 'Supporting Documents Checklist' is expanded, showing a table of required documents. The 'Reconciliation Report Form 2' is listed as mandatory. The 'Actions' column for this document has a red circle around a plus icon. Below the checklist is an 'Attachments' section with a table that currently shows 'No records found'.

Description	Required	Applies To	Status	Download Link	Subrecipient Document Link	Actions
Reconciliation Report form	Optional	Reconciliation Report	Active	Not Applicable	Not Applicable	
Reconciliation Report Form 2	Mandatory	Reconciliation Report	Active	Not Applicable	Not Applicable	
Total Records 2						

Attachment Name	Classification	Description	Last Modified Date	Created By
No records found				

Uploading Documents

The steps to upload documents under the Supporting Documents Checklist section for a Reconciliation Report are the same steps as outlined on [Pages 9 to 10](#) under Progress Reports.

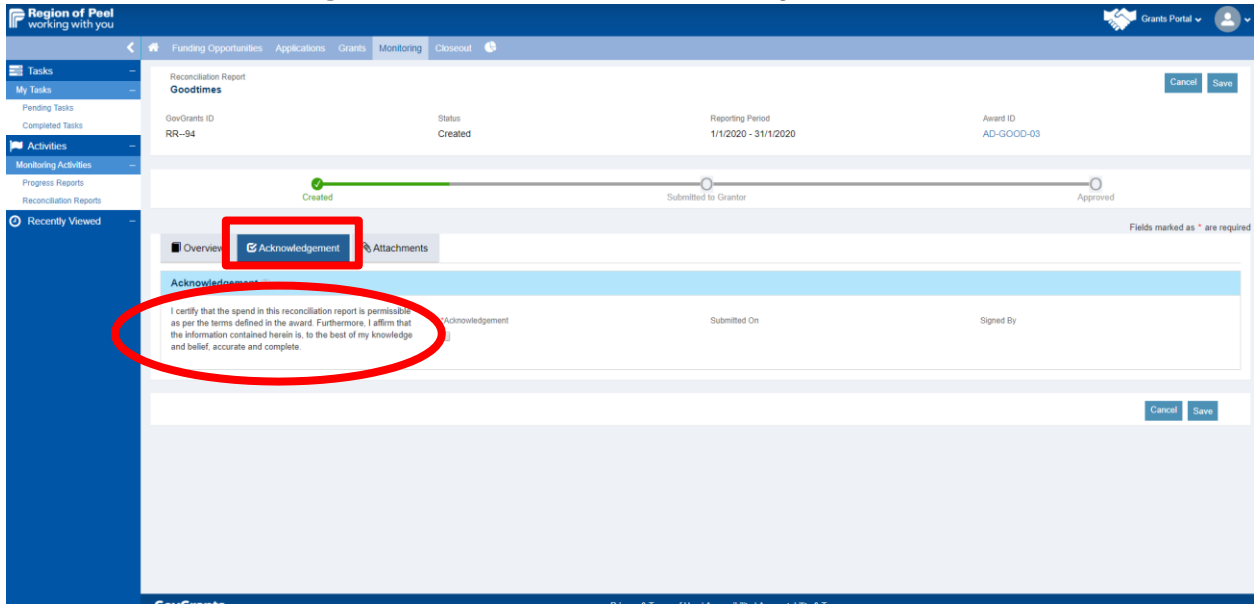
Adding An Attachment

Should you need to attach a document to your report, complete the same steps as outlined on [Pages 11 to 12](#) under Progress Reports.

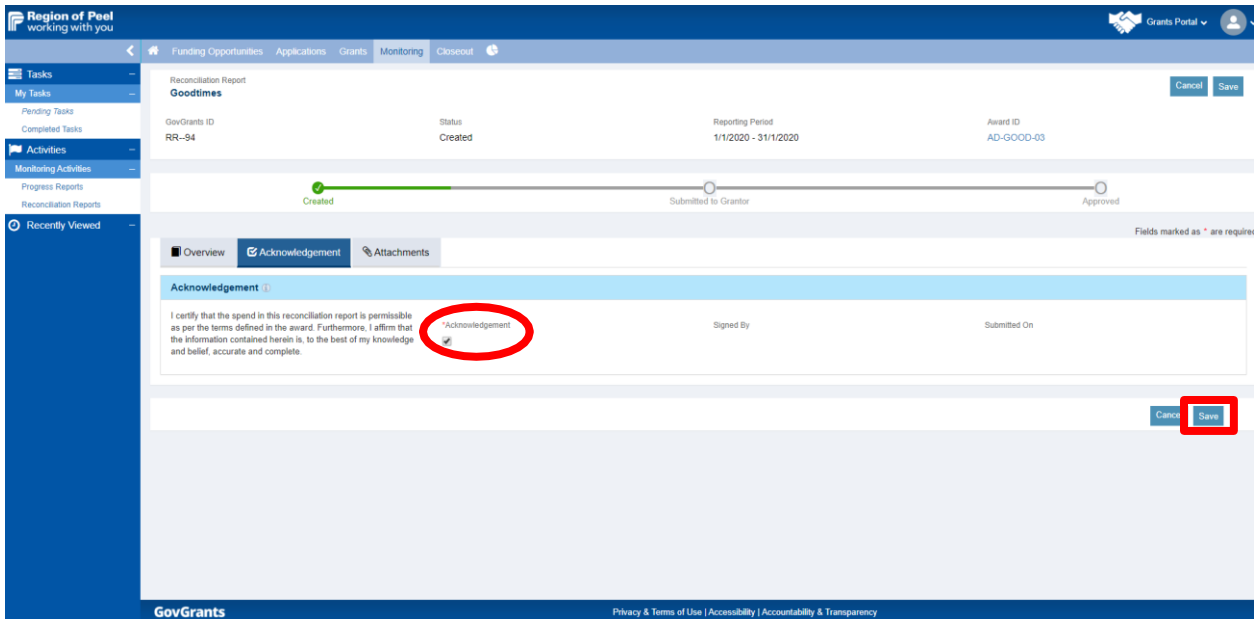
Progress & Reconciliation Module

Acknowledgement Tab

Click on the **Acknowledgement Tab**. Read the acknowledgement.



Click the **Acknowledgement radio button**. Then click **Save**.



Progress & Reconciliation Module

Review your submission. Click the **Submit for Approval** button.

The screenshot shows the GovGrants portal interface. The status is 'Submitted to Grantor'. A red box highlights the 'Submit for Approval' button. The 'Reconciliation Report Information' section shows the following data:

Service Provider	Program Area	Submission Date
HeadOffice7	Human Services Department	
Due Date (1)	Award Amount	Award Amount Balance
01/03/2020	\$222,000.00	\$222,000.00
Total Paid-to-Date	Total Spent-to-Date	Variance
\$0.00	\$38,050.00	(\$38,050.00)
Percentage of Amount Remaining	Percentage of Time Remaining	
82.86%	91.78%	

The 'Budget Reconciliation' table is also visible:

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent
Salaries and Benefits	\$193,000.00	\$0.00	\$30,000.00	\$163,000.00	\$193,000.00	\$0.00
Staff Travel Expenses	\$9,000.00	\$0.00	\$1,200.00	\$7,800.00	\$9,000.00	\$0.00

Notice the status now changes to **Submitted to Grantor**. You can no longer edit your submission.

The screenshot shows the GovGrants portal interface with the status updated to 'Submitted to Grantor'. The progress bar now shows 'Submitted to Grantor' as the current step. The 'Reconciliation Report Information' section shows the following data:

Service Provider	Program Area	Submission Date
HeadOffice7	Human Services Department	17/4/2020
Due Date (1)	Award Amount	Award Amount Balance
01/03/2020	\$222,000.00	\$222,000.00
Total Paid-to-Date	Total Spent-to-Date	Variance
\$0.00	\$38,050.00	(\$38,050.00)
Percentage of Amount Remaining	Percentage of Time Remaining	
82.86%	91.78%	

The 'Budget Reconciliation' table is also visible:

Budget Category	Awarded Budget	Spent Previously	Spent this Period	Projected Spending for Remaining Periods	Total Forecast	Projected Year-to-Date Underspent
Salaries and Benefits	\$193,000.00	\$0.00	\$30,000.00	\$163,000.00	\$193,000.00	\$0.00
Staff Travel Expenses	\$9,000.00	\$0.00	\$1,200.00	\$7,800.00	\$9,000.00	\$0.00

Approved Reconciliation Report

Once the Region of Peel has approved the Progress Report, the provider will receive an email stating that it has been approved.

Hello HeadOffice7,

This email is to inform you that reconciliation report RR--94 for award Goodtimes has been approved.

Please do not reply to this email. You may contact the Region of Peel, if you have any questions or need assistance.

Thank you,
Region of Peel