ODF-UCF Tutorial: Submitting a Progress Report

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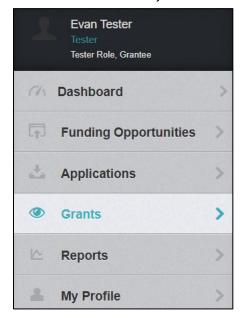
Progress Report Video Tutorial

Getting Started

1. Log into the online grant portal (WebGrants - Oregon Department of Forestry).



2. From the side menu, click on "Grants".



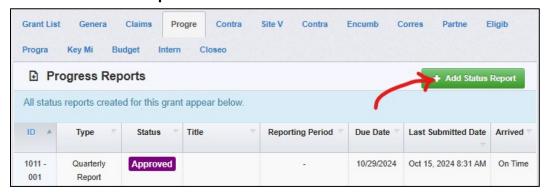
3. Select the grant you would like to access in the "Current Grants" listing.



4. Once you have selected the grant, you will be directed to the Grant Components. Select "Progress Reports" from the list of Grant Components.



5. Click "Add Status Report" button.



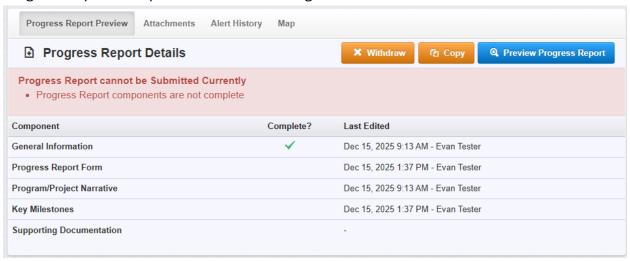
6. You will then be directed to the Claim "General Information" form.



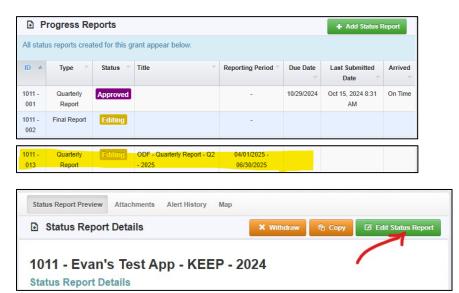
- 7. Select from the following "Sub Type" options:
 - a. "Quarterly Report": This will be the standard progress report for subrecipients, unless it is the final close-out report for the award.
 - **b.** "Final Report": This is the closeout report, which is selected only when all the work is complete.
- **8. Enter a title for the report.** There is no required format, but we recommend the following: Organization Name "Progress Report" Quarter Number Year. For example, if the organization was ODF and I were submitting a report for the second quarter of 2025, I would use the title "ODF Progress Report Q2 2025".
- 9. Enter the Report Dates. Include the start and end date of the period you are reporting. For example, if you are submitting a progress report for the second quarter of the year, type in 04/01/2025 as the start date and 06/30/2025 as the end date.
- 10. Click the "Save Form" button to finish the "General Information" form.



11. When you create a new Progress Report, you will automatically be directed to the Progress Report Components list after saving the General Information form.

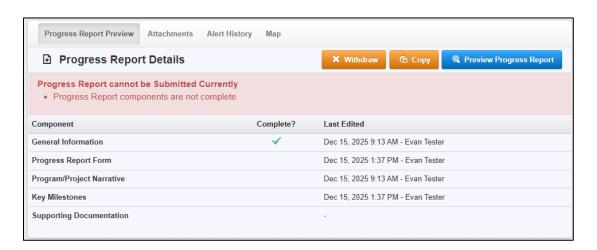


12. If you are returning to a report that you already set up, follow steps 1-4 above, navigate to the progress report you want to update from the list of available reports, and click on the "Edit Progress Report" button.



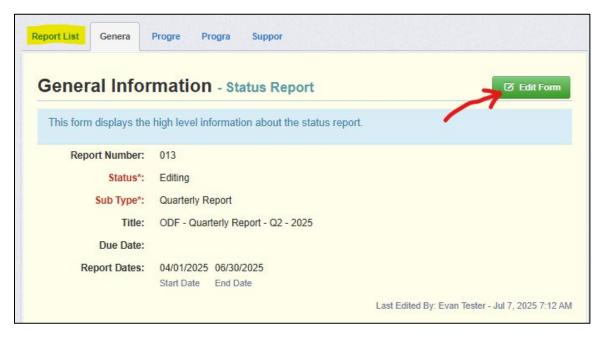
Progress Report Forms

- There are five sections that need to be completed before you can submit a
 progress report. Once you have marked a form as complete, a green check mark (✓)
 will appear in the middle ("Complete?") column of the component list (for example, see
 General Information above). You will only be able to submit the progress report once all
 forms are marked as complete.
 - a. <u>General Information</u> This form is completed when you create a progress report and requires you to input basic information on report type, title, and dates (see steps 6-10 above).
 - Progress Report Form This form is where you document a summary of project progress, any problems encountered, planned changes, and additional comments.
 - c. <u>Program/Project Narrative</u> This form is where you document accomplishments completed (i.e., performance metrics).
 - d. <u>Key Milestones</u> This form is where you document progress towards completing project deadlines.
 - e. <u>Supporting Documentation</u> This form is where you submit any additional documents. Note: you will need to complete the first question of this form regardless of if you wish to submit additional documentation.

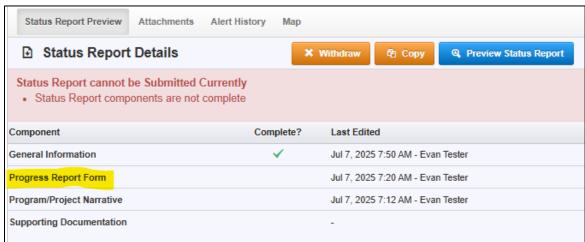


2. You can update the General Information form by clicking on "General Information" in the component list and then clicking on the "Edit Form" button. You can toggle back to the component list (or any other of the forms) from any of the forms while in preview mode by clicking on the "Report List" tab at the top of the form (see highlight below).





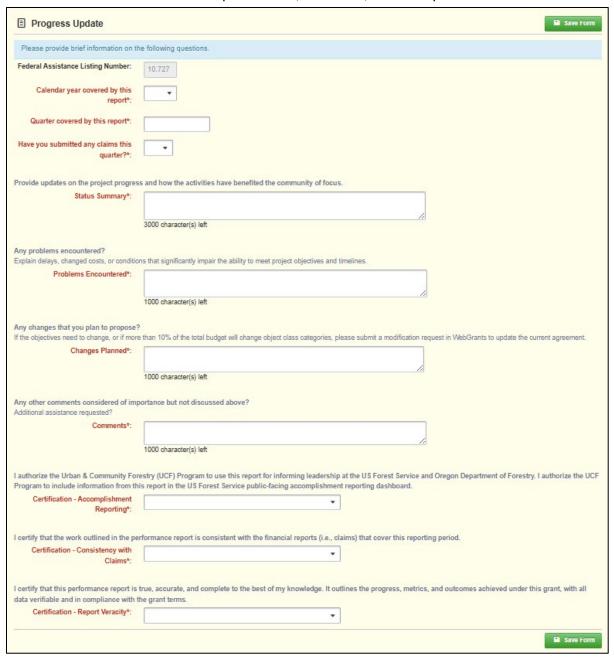
3. Click on the Progress Report Form in the component list.



4. Click the "Edit Form" button and enter the following information:

- a. Calendar year (2025, 2026, 2027, or 2028) and quarter (Q1, Q2, Q3, or Q4) covered by the report.
- b. Whether or not any claims were submitted during the reporting period.
- c. An update on project progress and the benefits to the community.
- d. Any problems encountered.

- e. Any changes that you plan to propose.
- f. Any other comments.
- g. A certification that the Urban & Community Forestry Program can use information from the progress report in their reporting to leadership and the US Forest Service public-facing accomplishment reporting dashboard.
- h. A certification that the performance report is consistent with the financial reports that cover this reporting period.
- i. A certification that the report is true, accurate, and complete.

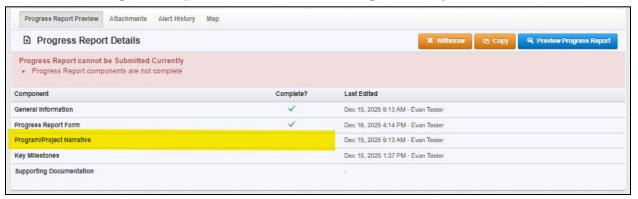


Calendar year covered by this 2025 report*:

5. Once the information above has been entered, click the "Save Form" button and "Mark as Complete".

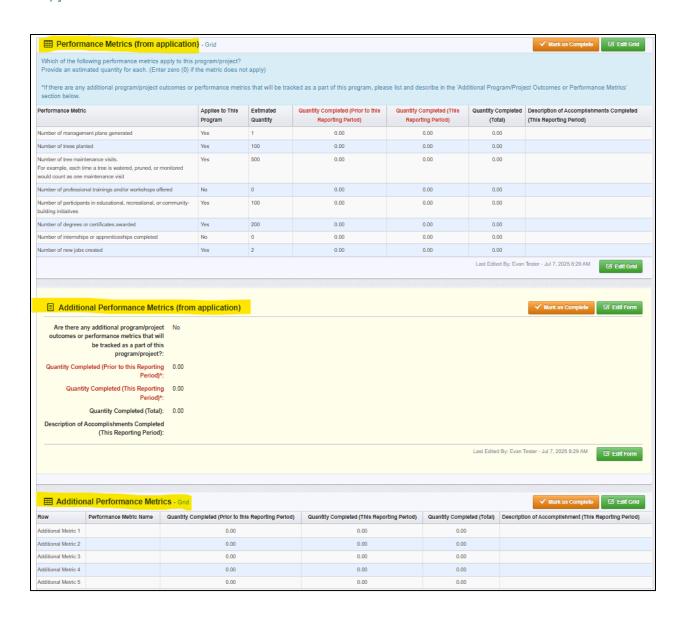


6. Click on the Program/Project Narrative form in the grant component list.



7. There are three sections to complete in the Program/Project Narrative form:

- a. <u>Performance Metrics (from application)</u> –these performance metrics are those that were entered during the application process (*note: the quantities can be updated in the grant, but you will have to contact ODF staff to initiate a change*).
- b. <u>Additional Performance Metrics (from application)</u> these include any additional performance metrics that were entered during the application process (note: this can be updated in the grant, but you will have to contact ODF staff to initiate a change).
- c. <u>Additional Performance Metrics –</u> this is where you would enter additional accomplishments or performance metrics that you are tracking as a part of this grant that were not entered at the time of the application.

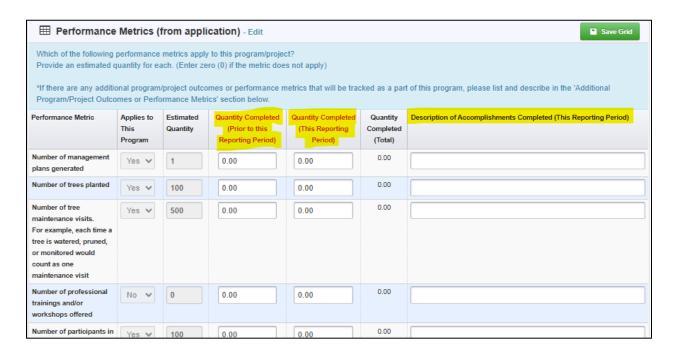


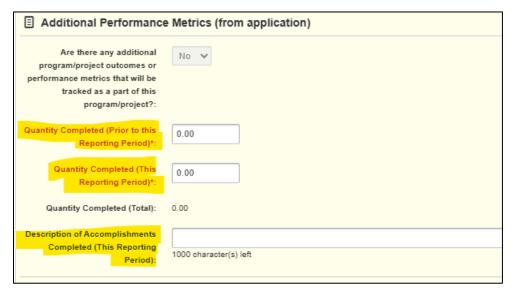
8. Click the "Edit Grid" button to edit all three sections.



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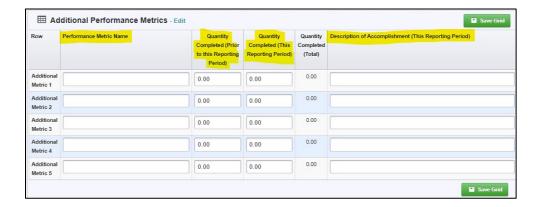
9. For each performance metric in the first two sections (with data pulled from the application), enter 1) the quantity completed prior to this reporting period, 2) the quantity completed during this reporting period, and 2) a description of the accomplishments. Note: The total quantity completed will be updated when you save the form.



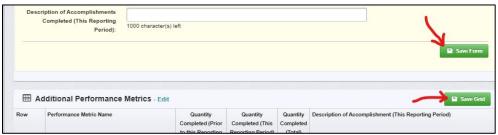


10. If there are additional performance metrics that you are tracking, enter them in the third section ("Additional Performance Metrics").

For each additional performance metric, enter 1) a name for the metric, 2) the quantity completed prior to this reporting period, 3) the quantity completed during this reporting period, and 4) a description of the accomplishments.

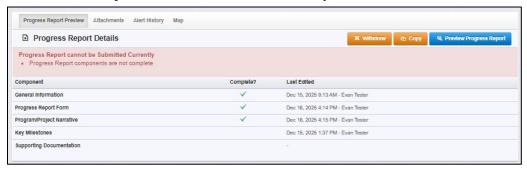


11. Click any of the "Save Grid" or "Save Form" buttons when you are finished with the form and then click the "Mark as Complete" button.

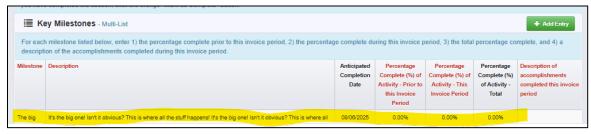




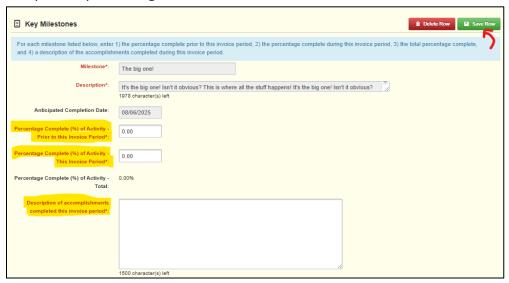
12. Click on the Key Milestones form in the component list.



13. The Key Milestones from the proposal/grant will be visible in the Key Milestones table. Click on the milestone that you would like to update. Note: Do not click on the "Add Entry" button. If you would like to add milestones, contact UCF Program staff to update the "Key Milestones" outside of the Claims module.



14. For each milestone, 1) enter the <u>percent complete prior to this invoice (%)</u>, 2) enter the <u>percent complete during this invoice period (%)</u>, 3) provide a <u>description of the accomplishments</u>, 4) and <u>click the "Save Row" button</u>. Note: the total percent column will update automatically by adding the prior and current completion percentages.



15. Once you have completed entries for all milestones, click the "Mark as Complete" button.



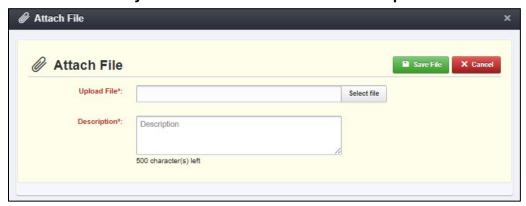
16. Click on the Supporting Documentation form in the component list.



17. Select "Yes" or "No" to the question, "Are you submitting supporting documentation with this progress report?". Then, click save form.



18. If you selected "Yes", click the "Add New Attachment" button, attach the file, provide a description of the attachment, and click the "Save File" button for each attachment you would like to include with the report.



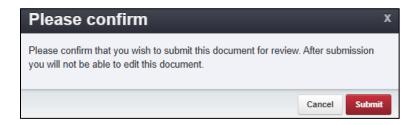
19. Once you have finished uploading attachments, click the "Mark as Complete" button. If you selected "No", simply click "Mark as Complete".



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20. When all five components have been marked complete, you will notice a green section above the grant components lists that says, "Progress Report is in compliance...". If you are read to submit, click the "Submit Progress Report" button and click the "Submit" button on the confirmation pop-up window.





Any technical assistance with the report or questions about what to include with the progress report, please contact your UCF point of contact or request technical assistance through the ucf.program@odf.oregon.gov. Thank you.