Indian Health Service
Division of Grants Management
Progress Reports Requirements
Prepared by: Ms. Tammy Bagley,
Acting Director, DGM
Who is responsible for monitoring?

- Technical monitoring of services and programmatic compliance:
  - Program Staff

- Administrative and fiscal monitoring
  - Grants Management Staff
Reporting Requirements

- Financial
- Performance

Question:
- Where can the specifics be found in determining reporting requirements?

Answer:
- Refer to the terms and conditions of the Notice of Award.
Reporting Requirements

- All reports must be submitted to the Division of Grants Management via GrantSolutions.

- Reports must be uploaded into the Grant via Grant Notes.
Federal Financial Reports (SF–425):

- IHS determines the frequency of required reports for the grantee.

- IHS may require reports more frequently than quarterly but no less frequently than annually, in the event that additional financial monitoring is required.
Reporting Requirements Financial

- If the FFR is required annually, the grantee must submit their report 90 days after the end of the budget period.

- In an effort not to place undue burden on our grantees, we require financial reports annually; however, if there are financial and/or programmatic concerns that warrant more frequency in financial reporting, the grantee will be required to submit either quarterly or semi-annual financial reports.
Reporting Requirements
Performance

Progress Reports

- The IHS will determine the frequency for which the performance reports are due to the agency.

- Generally, progress reports are required annually and are a part of the continuation application.

- However, there are exceptions and these are communicated in the terms and conditions of the grant.
Reporting Requirements
Performance

- Annual reports that are not due/submitted with the continuation application are due 90 days after the end of the each budget period.

- In an effort not to place undo burden on our grantees, we require programmatic reports annually. However, if there are program compliance concerns, the grantee may be asked to submit a performance report more frequently.
Templates for Reports

- There are no standard templates for progress reports.

- IHS programs have different programmatic reporting requirements based on the specific program legislation, desired outcomes and evaluation components.

- It is the responsibility of the program office to provide detailed guidance to the grantees on what information is required in their progress reports.
For additional information regarding IHS Progress Report requirements please contact your assigned GMS directly or you may call the DGM main line of (301) 443–5204.

If you find further assistance is needed please contact:

Ms. Tammy Bagley  
Acting Director, CGMO, GPO  
Tammy.Bagley@ihs.gov  
(301) 443–7172

Mrs. Denise Clark  
Grants Mgmt Officer  
Denise.Clark@ihs.gov  
(301) 443–2215
How to Submit a Progress or Financial Report in GrantSolutions

- Find your grant on the My Grants List page.
- Click the Grant Notes link.
- Click the Add button at the bottom of the Grant Notes page.
- Fill out the top section. Each field is required. The subject must be short but descriptive.
- In Note Attachments, enter a description of the file.
- Click Browse to find and upload your file, just like attaching a file to an e-mail message.
- Click Upload on the Grant Notes page.
- Once you’ve uploaded all of your files, click Submit.
Progress or Financial Report Submission Questions?

- For technical grants management concerns or information required to submit your report, please contact your Grants Management Specialist, listed on your Notice of Award or contact our main line on (301) 443–5204.

- For system related questions about GrantSolutions, please contact Paul Gettys, Grant Systems Coordinator.
  - E-mail – Paul.Gettys@ihs.gov
  - Phone – 301–443–2114
The Division of Grants Management would like to take this opportunity to thank you for being a part of this Grants Management sponsored training. DGM is dedicated to Empowering our IHS grant community with the required knowledge and training needed for continued compliance of IHS policies, Indian laws, and HHS legislative and regulatory requirements.