5 Reports to Help Manage a Program Area

1. **Allocations By Type**
   a. <u>INPUTS</u>: Fiscal Year, Funding Application(s) Name, Grant(s) in that Funding Application
   b. <u>PURPOSE</u>: Provide a printout of the Allocation page of that Funding Application for every eligible Organization, regardless of the current status.
   c. <u>DESCRIPTION</u>: This report is great to see the overall distribution of funds across all your applicants.   Because it shows the entire Allocation page, you can get summary views of amount of Incoming Carryover mid fiscal year, or Outgoing Carryover post liquidation period. Reveals other allocation categories such as Released/Forfeited.

2. **Allocations by Source**
   a. <u>INPUTS</u>: Award Year, Source Type, Source Grant
      i. NOTE** You must know the Funding Account Codes in order to select the Source Grant. If you are unsure what yours are, contact the Accounting unit.
   b. <u>PURPOSE</u>: Provide tracking document of how funds are carried over year over year from the original source year.
   c. <u>DESCRIPTION</u>: This report is great in monitoring and managing your funds at risk to expire (i.e. funds already carried over). Be aware of the date your funds expire as there is often confusion with the field when they have overlapping source years in a funding application.

3. **Budget Details**
   a. <u>INPUTS</u>: Fiscal Year, Funding Application(s), Grant(s)
   b. <u>PURPOSE</u>: Provide a brief snapshot of all the budget narratives for a given funding application
   c. <u>DESCRIPTION</u>: This report is great for quality control checks, ensuring inter-rater reliability for your program specialists, or doing a quick search of what is contained in the budgets of your funding applications. The report has column headings of Object/Function Code, a Description (*note that each budget narrative reports only the first 250 characters*), the cost and line-item total.

4. **Grant Hold Summary**
   a. <u>INPUTS</u>: Fiscal Year, Funding Application(s), Grant(s)
   b. <u>PURPOSE</u>: Provide a summary of the hold statuses of the organizations currently active in the desired fiscal year & grant.
   c. <u>DESCRIPTION</u>: This report is the best summary of *PROGRAMMATIC HOLDS*. While Fiscal and Global holds are posted at the top of each funding application, programmatic holds can be harder to identify (they live in the Reimbursement Requests for that Organization). Recall that Programmatic Holds prevent funding applications from reaching Director Approved. Each program area manages their programmatic holds.

5. **Funding Application Approval Tracking**
   a. <u>INPUTS</u>: Fiscal Year(s), Award Type(s), Revision, Unit(s)
      i. Unlike most reports that use Funding Application and Grant, this report is set up by Award Type (Entitlement/Competitive) and Unit (the ADE program area that manages that funding application)
      ii. Can filter for Original applications or Revisions
   b. <u>PURPOSE</u>: To track the approval of the Original funding application
   c. <u>DESCRIPTION</u>: Report is full of information related to approval of funding applications. Can be used to gauge the efficiency of your team in processing applications. Includes submission/final dates apps are in the Specialist queue, the Director's queue and when it receives that final director approval (including the name of the staff approving)

6. **Detail Page Responses** (*BONUS REPORT*)
   a. <u>INPUTS</u>: Fiscal Year, Funding Application, Application Status, Funding Application Section, Details Page
      i. Advanced inputs require deep understanding of the pages within you funding application.
   b. <u>PURPOSE</u>: A general, "catch-all", that creates a report of the information entered on a given page.
   c. <u>DESCRIPTION</u>: This report is very general. It just takes the information entered on a given page in the funding application and compiles it together. Most information you would need already has a better, customized report in the Menu. This is used for those few one-off cases.
      i. Example: *Title I Completion Report Program Details exists, but Title IV version does not.*