



TAX CREDIT ANNUAL REPORT INSTRUCTIONS


Annual Reports are a requirement of your contract with CDFFA for your Tax Credit project. Once you've logged in, click on **My Grants** and select your grant by name. Then, click on **Status Reports** in the components list.

For Your First Report

If this is your first report, it has already been created for you. Look for the report that says "Tax Credit Annual Status Report, report period 07/01/2017-06/30/2018, due date 07/31/2018. To get into the report click on the status report ID that corresponds to the annual report. Once in the report, click on "edit" in the top right corner of your screen. Next click on "Tax Credit Annual Status Report", then click "edit".

This is where you will provide an update on your project. The "**Outcomes Update**" (second box) is where you'll describe your project's progress. Answer the questions in the instructions section (top box) to give a report of the progress over the last year.

The next section is **Outcome Measures- Proposed vs. Actual**. The outcomes will be listed. Enter the current data in the "**Actual Outcome- This reporting Period**" column, and cumulative data in the "**Cumulative Outcome- Since the start of the grant**" column. For your first report these two columns will be the same. Click **Return to Top** and **Save**.

Now you'll use the upload tool to submit documentation. Under Required Annual Documents, click on the  on the line labeled: "Organization's most recent Annual Report." This will open a dialogue box where you can upload a document. Click Choose File. This will let you find your annual report on your computer. Click on the document title, then click Attach File and the dialogue box will close. Repeat this step for the Organization's most recent audited financial statements, and Project Special Terms and Conditions (as applicable). Remember to use .pdf and .jpg files only to protect the

integrity of the document. Once you've completed the report, scroll the top of the page and click Mark as Complete.

If you would like a copy of the report, click Preview and Print and the report will appear in a separate tab in your browser. You can print or save the report from there. Click on the **back button** in the Grants Management System. Click **Submit**, then **Ok** when prompted.

Your program manager will be notified of your report submission and review your report. If they have any questions in regard to the information submitted they will negotiate the report back to you. If the report is complete, they will approve it.


For Later Reports

If this is not your first Annual Report, Click on **Copy Existing Status Report**, select the most recent Annual Status Report by clicking the circle next to it in the "**Copy**" column, and click **Save**.

Now click on General Information. Click on the **Edit** icon. Enter the first and last day of the month the report covers. For Report Period, use July 1 of last year for the "From" date and June 30 of this year for the "To" date. If you click on the calendar icon, it will bring up a calendar where you can select the date. If you choose to type the dates in, be sure to use this format: MM/DD/YYYY. The status report type should be **Tax Credit Annual Status Report** from the dropdown menu. Click **Save** and then click **Return to Components**.

Click on **Tax Credit Annual Status Report**. Click **Edit** and the form will allow you to enter data. In the dropdown menu in the report section, select **Annual Report**. The "**Project Goal Narrative**" is where you'll describe your project's progress. Answer the questions in the instructions section to give a report of the progress over the last year.

The next section is **Outcome Measures- Proposed vs. Actual**. Enter the current data in the **Actual Outcome- This reporting Period** column, and cumulative data in the **Cumulative Outcome- Since the start of the grant column**. Click **Return to Top** and **Save**.

Now you'll use the upload tool to submit documentation. Under **Required Annual Documents**, click on the  on the line labeled: **Organization's most recent Annual Report.**" This will open a dialogue box where you can upload a document. Click **Choose File**. This will let you find your annual report on your computer. Click on the document title, then click **Attach File** and the dialogue box will close. Repeat this step for the **Organization's most recent audited financial**

statements, and **Project Special Terms and Conditions** (as applicable). Remember to use .pdf and .jpg files only to protect the integrity of the document. Once you've completed the report, scroll the top of the page and click **Mark as Complete**.

If you would like a copy of the report, click **Preview** and the report will appear in a separate tab in your browser. You can print or save the report from there. Click on the **back button** in the Grants Management System. Click **Submit**, then **Ok** when prompted.

Your portfolio manager will be notified of your report submission and review your report. If they have any questions in regard to the information submitted they will negotiate the report back to you. If the report is complete, they will approve it.