



ANNUAL STATUS REPORT INSTRUCTIONS

Your contract requires that you submit an annual status report on July 31st each year of your contract. These are submitted via GMS and based on the proposed outcomes you stated in your application.

Once you've logged in, click on **My Grants** and select your grant by name. Then, click on **Status Reports** in the components list. Create a new report by clicking **Add** (next to the green plus symbol).

Enter the first and last day of the month the report covers. You can type the date in using MMDDYYYY format, or you can select the date by clicking on the calendar. Next, select **Tax Credit Annual Status Report** from the dropdown menu and click **Save**. Then click on **Return to Components**.

You'll see a list of two sections: General Information, and Tax Credit Annual Status Report. 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**. In the Project Goal Narrative section, you'll type in a narrative of your progress over the past year under, using the instructions as guidance. 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. For the first report, these columns will be the same. If you don't have any numbers to report because your project is not complete, that is ok. Please be sure to explain the lack of progress in the narrative and use zeroes or baseline numbers from the application, as appropriate. 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

Once you've completed the first report, you can start the next year's report by clicking **Copy Existing Report**. Once the previous months report is copied, information entered prior will have to be edited to reflect the current year's activity.