MONTHLY FUNDRAISING REPORT INSTRUCTIONS

Fundraising reports are due on the 5th of each month of your contract period until you've secured pledges for your entire tax credit award (or your fundraising deadline expires). These reports are completed via GMS as follows:

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 MMDDYYY format, or you can select the date by clicking on the calendar. Next, select **Tax Credit Monthly Fundraising 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 Monthly Fundraising Report. Click on **Monthly Fundraising Report**. Click **Add**, and fill in the information about each prospective donor you've contacted in the month. When you're done, click **Return to Top** and **Save**. Repeat this step until you've entered information for all donors contacted over the month. Once you've entered data for all the prospective donors for the month, 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 month'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 month's activity.