

### **How to complete the Tax Credit Fundraising report**

1. Log in
2. My grants
3. Grant name
4. Status reports
5. Create status report
6. Status report type -> Tax credit monthly fundraising report
7. Enter the period the report covers
8. Save
9. Return to components
10. Monthly fundraising report
11. add -> enter the information for each prospective donor -> save
12. for each prospective donor, repeat step 11
13. Once all prospective donors are entered -> mark as complete
14. If you would like a copy of the report -> preview -> the report will appear in a separate tab in your browser -> print or save report
15. Click on the back button in the Grants Management System
16. Submit -> ok
17. 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
18. Submit this report each month

### **Copy an Existing Report**

1. This feature can be used to copy one month's report to start the following months report
2. Once the previous months report is copied, information entered prior will have to be edited to reflect the current month's activity.