



The Colorado Health Foundation™

# Together

Grantee Information Webinar:  
*Online Reporting*



# Online Reporting

- Benefits include:
  - Minimizes use of paper
  - Consistent with our online application process
  - Consistency of grant reports

# When Do I Report and What Do I Do?

**Grant Approval & Agreement Lists Reporting Requirements**



**Receive Report Reminders via Email, Sent to Project Contact**



**Access the Online Report Form & Complete**



**Submit Online Report by Due Date**



**Confirmation Receipt via Email**

# Online Report and How to Submit

# How Do I Access My Online Report Form?

- You'll receive a reminder email 30 days prior to report due date that will have links to:
  - Your online report form
  - Sample report guide
  - Technical tips
  - Online reporting FAQs
  - Contact information if you have additional questions

# How Do I Log In To Access the Report Form?

- Click on the link in the email
- Log in with the email and password used for prior applications
- If forgotten or do not know your password, select the forgot password option and a temporary password will be sent via email
- Once you receive your temporary password, click on the link provided in the email, log in, and the system will prompt you to replace the temporary password with your own.
- You will receive an additional email with the password that you just set up. Please keep this email for future reference.
- If you do not receive an email with a temporary password, check your SPAM folder.

# How Do I Log In To Access the Report Form?

*Click on the link in the email received from the Foundation*

## Please Sign In

Welcome to the Colorado Health Foundation Online Grant Account  
If you are a first time user of our system:

- Select "new applicant"

If you have an established account on this system:

- Enter your e-mail address
- Enter your password
- Click the "Login" button

The Colorado Health Foundation Main Site

E-mail

mgoodwin@coloradohealth.org

[New Applicant?](#)

Password

.....

[Forgot Password?](#)

Login

# How Do I Access My Online Report Form?

- Once you log in, there will be two tabs near the top of your screen. These are specific to your individual account and may not include everything for your organization.
  1. Applications
  2. Requirements (aka reports)
- Click on requirements to access your report. The drop-down menu allows you to select these requirements:
  - **New:** reports that have not been started
  - **In Progress:** reports that have been worked on, saved, but not yet submitted
  - **Submitted:** copies of reports that are complete and have been successfully submitted to the Colorado Health Foundation.
- Refer to the Technical Tips document for support

# How Do I Access My Online Report Form?

Account: mgoodwin@coloradohealth.org | Change E-mail/Password  
Last Log in: 7/16/2015 4:42 PM GMT-05:00

Contact Us | Exit

Applications **Requirements**

## Requirements

Below you will find all saved and completed requirements.

Show **New Requirements** ▼

Hide Viewer Only Requirements

Form Name	Project Title	Type	ID	Due	Updated	My Role	Action
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Applications **Requirements**

## Requirements

Below you will find all saved and completed requirements.

Show **In Progress Requirements** ▼

Hide Viewer Only Requirements

Form Name	Project Title	Type	ID	Due	Updated	My Role	Action
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<a href="#">Online Reporting</a>	Create healthy communities where it is easy to access affordable, healthy food and safe	Progress Report 11+	171570	06/12/2015	07/01/2015	Owner	9
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# Completing Your Online Report

As you complete the report form sections, keep in mind a few items:

- Refer to your organization's grant agreement as needed, and consider any changes made via amendments
- You may want to write the sections in a word-processing document and copy and paste them into the appropriate sections
- Although all grant milestones are listed, information provided in your responses should address all activities since last report
- Reports should be concise and include only relevant information (*1-2 paragraphs per question*)
- Some fields are marked with a red asterisk – this signifies the field is required and you will not be able to submit without including this information
- Refer to the Sample Report Guide resource for support

# Section 1: Organization Information

- Focuses on basic information about your organization and the specific grant you are reporting on. This information is read-only for you to review for accuracy.
- If any of the organization information needs updating, please create a separate document highlighting any changes and upload this document in the Attachments Section under the title “Organization Information Update.”



**1** Organization Information

**2** Intermediate Milestones

**3** Measurable Results

**4** Successes and Challenges

**5** Financial and Additional information

**6** Attachments

**7** Review My Requirement

## Organization Information

[Printer Friendly Version](#) | [E-mail Draft](#)

\* Required before final submission

- Please review the information below for accuracy. If information requires updating, please include a word document detailing any changes in the attachments section titled, "Organization Information Update"

Grant ID Number  
6779

Project Title  
the TCHF Consumer Health Advocacy funding opportunity

### Project Description

This initiative's goal is to ensure that public policy adequately addresses consumers' needs for a health insurance system that is stable, affordable and adequate. The initiative will support building an effective field of consumer advocates who are proactively influencing public policy decisions regarding health coverage and cost of care, in addition to providing annual program grants designated to support advocates in achieving specific policy targets.

## Section 2: Intermediate Milestones

- The intermediate milestones in your grant agreement will be listed for easy reference as you address progress made towards each of those milestones that relate to the current reporting period



1 Organization Information | 2 Intermediate Milestones | 3 Measurable Results | 4 Successes and Challenges | 5 Financial and Additional information | 6 Attachments | 7 Review My Requirement

## Intermediate Milestones

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\* Required before final submission

- Please refer to your organization's grant agreement as needed, and to consider any changes made via amendments, when completing this report
- We recommend writing the sections in a word-processing document and copying and pasting them into the appropriate sections below
- Information provided should address all activities since your last report
- Reports should be concise and include only relevant information (1-2 paragraphs per question)
- A grant progress/final report sample and guide is available for grantees [here](#). The sample report was created to give grantees an idea of the type of information and the appropriate level of detail needed.

Give an update on the intermediate milestones as specified in your grant agreement, focusing on those milestones that relate to this reporting period.

What are the intermediate milestones?

First Six Months:

- Facilitate the quarterly state-level stakeholder group and finalize the annual strategic plan for the stakeholder group with

## Section 3: Measurable Results

- Provide an update on the measurable results as specified in your grant agreement focusing on those measurable results that relate to this reporting period.
- You'll see the anticipated measurable results for each year of your grant listed for your reference according to your grant agreement.
  - For those anticipated measurable results that indicate yes, please check the box to indicate yes for the same actual measurable result and report on the actual measurable results achieved during the current reporting period, if applicable. If this result does not pertain to your project or is not listed on your grant agreement, leave this section blank.
- If there are measurable results listed in your grant agreement but with no specific anticipated quantity, check the box to indicate yes on the actual measurable result and leave the actual quantity field blank.



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## Measurable Results

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\* Required before final submission

- The information provided should be just for the current reporting period, not for the grant overall.
- Below you'll see the anticipated measurable results listed in your grant agreement. For those that indicate yes, please report on actual results achieved.

### Anticipated & Actual Measurable Results - Healthy Living

1. Increase number of children and adults who engage in moderate to vigorous physical activity - Anticipated

Yes

Year 1 Quantity Anticipated

1

Year 2 Quantity Anticipated

10

## Section 4: Successes and Challenges

- In this section, you'll share significant successes and challenges your organization faced related to the grant during this reporting period.
- For example, a significant success may be that 90% of program participants successfully completed the program and neighboring communities have also requested to participate. An example of a challenge may be that it took longer than expected to recruit and hire a Program Director and therefore, specific grant activities and intermediate milestones were delayed.



1 Organization Information	2 Intermediate Milestones	3 Measurable Results	4 Successes and Challenges	5 Financial and Additional information	6 Attachments	7 Review My Requirement
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## Successes and Challenges

[Printer Friendly Version](#) | [E-mail](#)

\* Required before final submission

- A grant progress/final report sample and guide is available for grantees [here](#). The sample report was created to give grantees an idea of the type of information and the appropriate level of detail needed.
- Responses should be concise and include only relevant information. (1-2 paragraphs per question)

\* Please describe the significant successes the organization experienced related to the grant.

## Section 5: Financial and Additional Information

- Report on items such as the grant's actual expenditures as compared to the approved budget and explain any variances, your organization's financial position, identify any unspent funds from the Foundation and your proposed plan for spending these funds.
- Keep in mind any budget revisions that have been approved by the Foundation since the initial award.



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## Financial and Additional information

[Printer Friendly Version](#) | [E-mail](#)

\* Required before final submission

- Using the format [here](#), please report back on the program/project's actual expenditures as compared to to the approved budget included in your grant agreement, and explain any discrepancies. Keep in mind any budget revisions that have been approved by the Colorado Health Foundation since the initial award. This pertains specifically to the funds received by the Colorado Health Foundation.
- Your organization's most recent financial statements for the reporting period (Balance Sheet and Income-Expense Statement) are required attachments. Please keep this in mind when completing the following sections.

\* Referring to your organization's financial statements for the year(s) in which the grant was used, please explain any significant changes in your financial position

## Section 5: Financial and Additional Information

- In the top portion of this section, you will find the required format for reporting back on actual expenditures as compared to the approved budget for your grant - refer to your grant agreement if needed. This pertains specifically to the funds received by the Colorado Health Foundation.
- Click on the link to open the format, save this document on your computer, input and save the actual expenditures for the current reporting period, and upload this document in *Section 6. Attachments.*

# Actual Grant Expenditures Form



The Colorado Health Foundation™

## Budget Report - Actual vs Approved Expenses

Using this format, please report back on the program/project's actual expenditures as compared to the approved budget included in your grant agreement. Keep in mind any budget revisions that have been approved since the initial award. This pertains specifically to the funds received by the Colorado Health Foundation.

Organization Name:

Project Title:

Request ID#:

Actual Grant Expenditures				
	Year 1	Year 2	Year 3	Total
<b>Direct Costs</b>				
General Operating	\$	\$	\$	\$0.00
Program/Project	\$	\$	\$	\$0.00
Personnel	\$	\$	\$	\$0.00
Programming/Project Costs	\$	\$	\$	\$0.00
Administrative costs related to	\$	\$	\$	\$0.00
Capital	\$	\$	\$	\$0.00
<b>Total Direct Costs</b>	\$	\$	\$	\$0.00
<b>Other Costs</b>				
Consultants	\$	\$	\$	\$0.00
Other	\$	\$	\$	\$0.00
Fiscal Sponsor Fee (if applicable)	\$	\$	\$	\$0.00
Indirect Costs (Max 10%, universities/colleges only - if approved)	\$	\$	\$	\$0.00
<b>Total Other Costs</b>		\$	\$	\$0.00
<b>GRAND TOTAL</b>	\$	\$	\$	\$0.00

## Section 6: Attachments

- There is an upload feature where you will attach each required and optional item.
- Simply select the appropriate document title from the Title Drop Down function under the subsection called Upload, Browse for the appropriate file and double click, and then select Upload.
- You will then see the uploaded attachment listed at the top of the Attachments Section.
- If you have any questions regarding attachments to submit or how to upload these documents, please do not hesitate to contact the Foundation at [grants@coloradohealth.org](mailto:grants@coloradohealth.org) or 303.953.3600.

# Attachments

## Required Attachments

- Most recent balance sheet
- Most recent income-expense statement
- Actual grant expenditures

## Optional Attachments (examples)

- Additional evaluation results
- Amendment request
- Changes to your organization's information



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## Attachments

[Printer Friendly Version](#) | [E-mail Draft](#)

### Additional Documentation Required:

The Colorado Health Foundation requires receipt of the documents listed below before a report for a grant can be reviewed.

**If you are unable to include documents electronically, please contact our Director of Grantmaking Operations to make arrangements for an alternative submission.**

Director of Grantmaking Operations  
(303) 953-3672  
Toll-free: (877) 225-0839  
E-mail: [grants@ColoradoHealth.org](mailto:grants@ColoradoHealth.org)

### Required Attachments:

- 1) Your organization's most recent financial statements for the reporting period (Balance Sheet and Income-Expense Statement).
- 2) Using the format [here](#), please report back on the program/project's actual expenditures as compared to the approved budget included in your grant agreement, and explain any discrepancies. Keep in mind any budget revisions that have been approved by the Colorado Health Foundation since the initial award. This pertains specifically to the funds received by the Colorado Health Foundation.

### Examples of Optional Additional Attachments Are:

- 3) Additional Evaluation Results. If you have conducted additional evaluation work other than the tracking of measurable results data, please share the report. Note: providing this attachment does not take the place of completing the narrative section on Progress and Results.

## After You Submit – What to Expect

- Once your report has been submitted, you will receive an email confirming its receipt
- A Foundation staff person will be in touch with you to touch base about your report and to follow-up with any additional questions as needed
- If the next payment for your grant is contingent upon the receipt and approval of the report you just submitted, you should receive payment in approximately 45 days, if there are not outstanding questions about the report

# Questions?

## Resources

- [Sample Report Guide](#)
- [Technical Tips Guide](#)
- [Frequently Asked Questions](#)
- [www.ColoradoHealth.org](http://www.ColoradoHealth.org)

## For all other questions, please contact:

Sarah Hughes  
Grants Assistant  
303.953.3600, [shughes@coloradohealth.org](mailto:shughes@coloradohealth.org)

Sara Guillaume  
Director of Grantmaking Operations  
303.953.3600, [sguillaume@coloradohealth.org](mailto:sguillaume@coloradohealth.org)

[grants@coloradohealth.org](mailto:grants@coloradohealth.org)