

CAL-E-GRANTS REFERENCE GUIDE: CREATING A PROGRESS REPORT FOR SEED

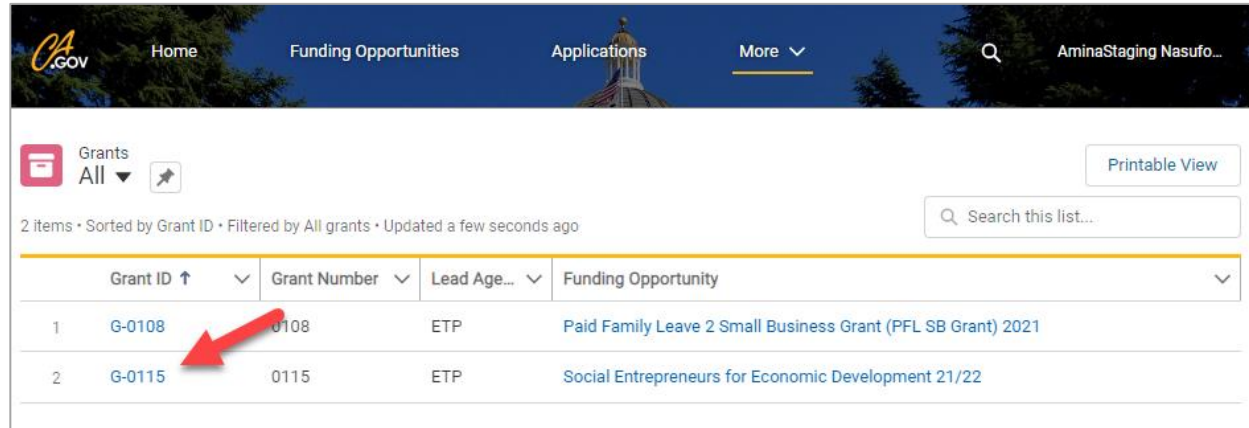
You must first log in to the system in order to apply for funding. Please refer to the **New User Registration** reference material for step-by-step procedures on how to become a user of the Cal-E-Grants system

1. From the Cal-E-Grants landing page, select the large **Grants** button




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- Click the **Social Entrepreneurs for Economic Development 21/22** link from the Grants list



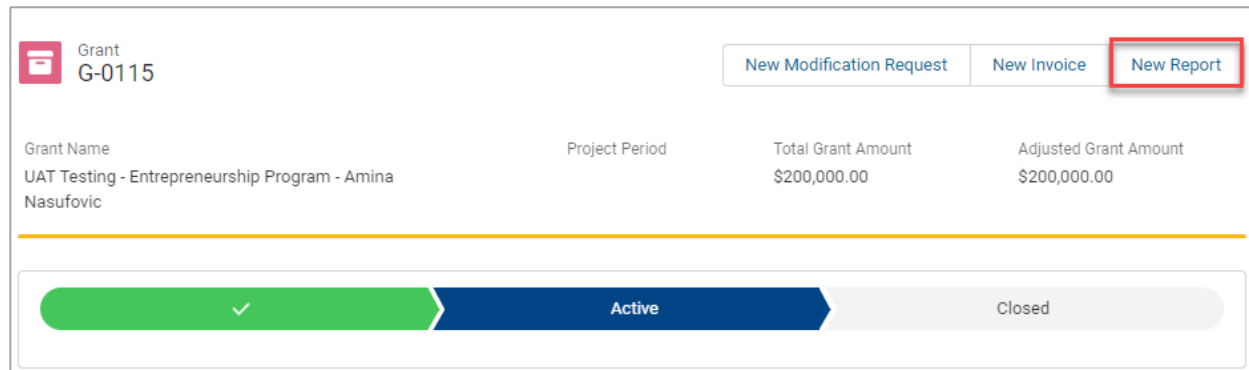
CA.gov Home Funding Opportunities Applications More ▾ AminaStaging Nasufo...


Grants All ▾  Printable View

2 items • Sorted by Grant ID • Filtered by All grants • Updated a few seconds ago

	Grant ID ↑ ▾	Grant Number ▾	Lead Age... ▾	Funding Opportunity ▾
1	G-0108	0108	ETP	Paid Family Leave 2 Small Business Grant (PFL SB Grant) 2021
2	G-0115	0115	ETP	Social Entrepreneurs for Economic Development 21/22

- Select the **New Report** button at the top right of the page



Grant G-0115 

[New Modification Request](#) [New Invoice](#) [New Report](#)

Grant Name	Project Period	Total Grant Amount	Adjusted Grant Amount
UAT Testing - Entrepreneurship Program - Amina Nasufovic		\$200,000.00	\$200,000.00

Progress bar: ✓ Active Closed

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4. Select your quarter from the drop down menu and click **Next**. Once completed, click **Save**.

**Under Title, list your Project Name/CBO*

1

Create New Report

Select Quarter

Select an Option

Cancel

Next

2

New Progress Report: Entrepreneurship Program

Information

Progress Report IDGrantG-0115

QuarterQuarter 1

Title

Title

Cancel

Save

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5. Once you click **Save**, a Progress Report will generate.

The screenshot shows the 'Progress Report PR-0052' interface. At the top right are buttons for 'Edit', 'Submit', 'New Note', and a dropdown arrow. Below this, the 'Grant' is listed as 'G-0115' and the 'Quarter' as 'Quarter 1'. A horizontal progress bar at the bottom shows four stages: 'Created' (highlighted in dark blue), 'Submitted', 'Approved', and 'Denied'.

6. Click the **Narrative** tab to navigate to Progress Report questions.



This screenshot is identical to the one above, but with an additional red box around the 'Narrative' tab in the bottom navigation bar and a red arrow pointing to it. The navigation bar includes 'Details' (highlighted in orange), 'Narrative' (boxed in red), 'Notes', and 'Documents'.

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7. Complete the following questions and select **Save** when completed.

*Questions differ for entrepreneurship and demonstration projects

Provide information on how your grant funds were expended in the most recent completed quarter.

Salesforce Sans ▼ 12 ▼ ■ ▼ B I U              

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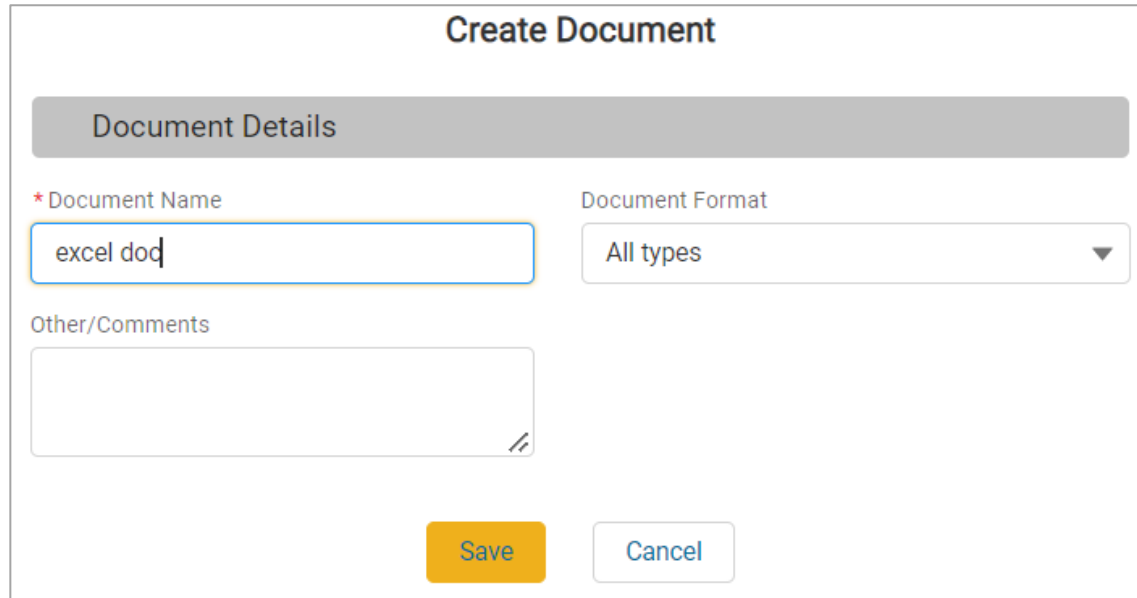
9. Select **New** to upload your document.



The screenshot shows the 'Documents' tab selected in a navigation bar with options: Details, Narrative, Notes, and Documents. Below the navigation bar is a table with four columns: Name, Status, Versions, and Action. In the top right corner of the table area, there is a 'New' button, which is highlighted with a red rectangular box.

10. A pop up will appear having you complete the document details. Once you have named your document and selected the format click **Save**.

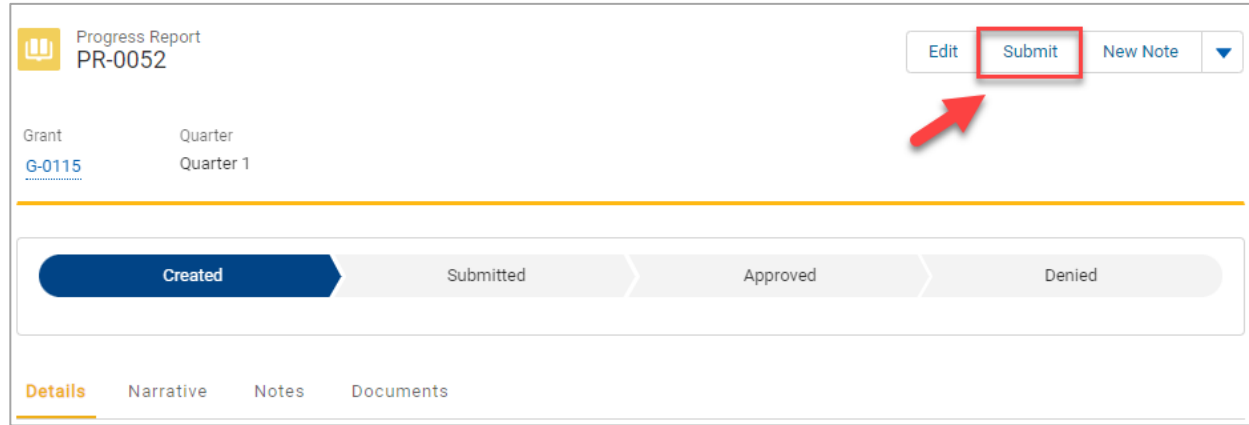
*Excel document format, use template provided



The screenshot shows a 'Create Document' pop-up form. It has a title bar 'Create Document' and a section header 'Document Details'. Below this, there are two main input areas. The first is labeled '* Document Name' and contains a text input field with the text 'excel doc'. The second is labeled 'Document Format' and contains a dropdown menu with 'All types' selected. Below these is a text area labeled 'Other/Comments'. At the bottom right of the form are two buttons: 'Save' (orange) and 'Cancel' (white with blue text).

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11. Once you have completed your progress report click the **Submit** icon.



Progress Report
PR-0052

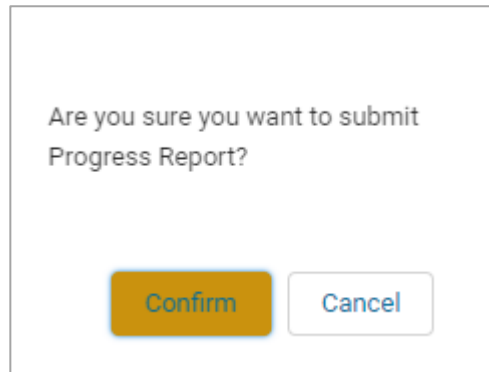
Grant: [G-0115](#) Quarter: Quarter 1

Buttons: Edit, **Submit**, New Note

Progress Bar: Created (active), Submitted, Approved, Denied

Tabs: **Details**, Narrative, Notes, Documents

12. **Confirm** that you want to submit your progress report.



Are you sure you want to submit Progress Report?

Buttons: **Confirm**, Cancel

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13. Your progress bar should now display **Submitted** when you are finished.

The screenshot displays the CAL-E-GRANTS web application interface. At the top, a navigation bar includes the CA.GOV logo, a search icon, and links for Home, Funding Opportunities, Applications, and More. The user's name, AminaStaging Nasufo..., is visible in the top right. Below the navigation bar, the main content area shows the 'Progress Report' section for PR-0052. It includes buttons for 'Edit', 'Submit', and 'New Note'. The 'Grant' is listed as G-0115 and the 'Quarter' as Quarter 1. A progress bar at the bottom indicates the current status: a green bar with a checkmark is followed by a blue bar labeled 'Submitted', with 'Approved' and 'Denied' bars following in a lighter shade.