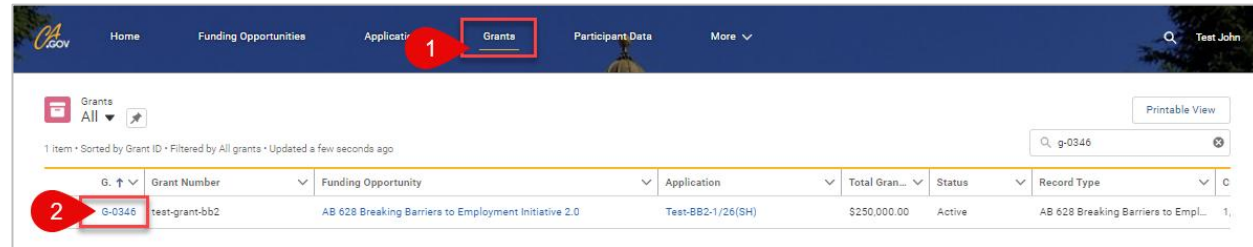


CAL-E-GRANTS REFERENCE GUIDE: PROGRESS REPORT

1. From the **Grants** tab, select the grant you wish to create a progress report for



Grants

1 item • Sorted by Grant ID • Filtered by All grants • Updated a few seconds ago

G. ↑	Grant Number	Funding Opportunity	Application	Total Gran...	Status	Record Type	
2	G-0346	test-grant-bb2	AB 628 Breaking Barriers to Employment Initiative 2.0	Test-BB2-1/26(SH)	\$250,000.00	Active	AB 628 Breaking Barriers to Empl...

2. The search bar can also be used to locate the grant



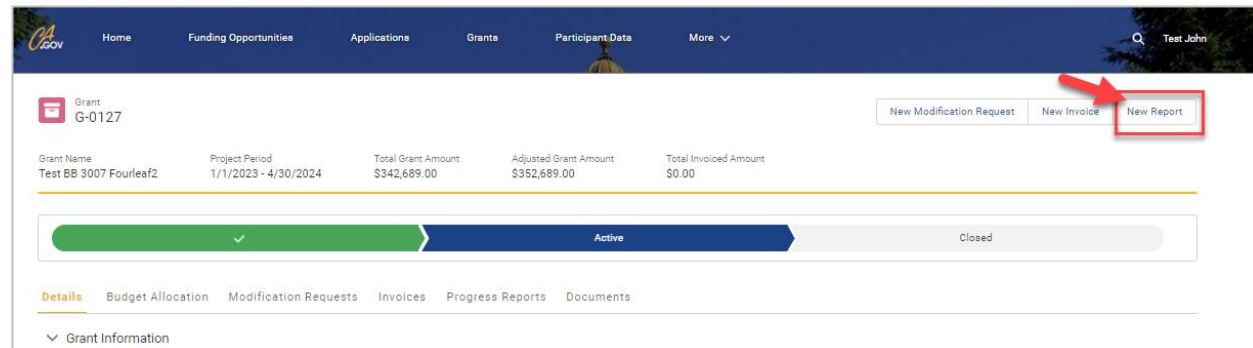
Grants

1 item • Sorted by Grant ID • Filtered by All grants • Updated a few seconds ago

g-0346

G. ↑	Grant Number	Funding Opportunity	Application	Total Gran...	Status	Record Type	
1	G-0346	test-grant-bb2	AB 628 Breaking Barriers to Employment Initiative 2.0	Test-BB2-1/26(SH)	\$250,000.00	Active	AB 628 Breaking Barriers to Empl...

3. Click on the **New Report** button



Grant G-0127

New Modification Request New Invoice **New Report**

Grant Name: Test BB 3007 Fourleaf2 Project Period: 1/1/2023 - 4/30/2024 Total Grant Amount: \$342,689.00 Adjusted Grant Amount: \$352,689.00 Total Invoiced Amount: \$0.00

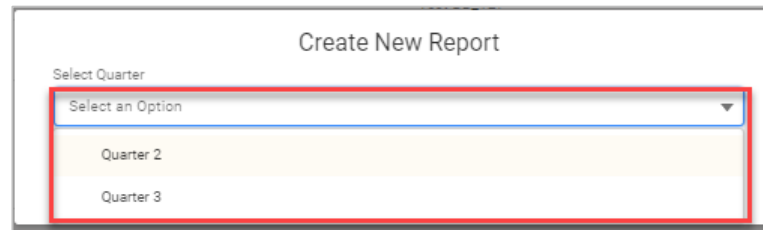
Active

Details Budget Allocation Modification Requests Invoices Progress Reports Documents

Grant Information

CAL-E-GRANTS REFERENCE GUIDE: PROGRESS REPORT

4. Select the appropriate quarter for the report



Create New Report

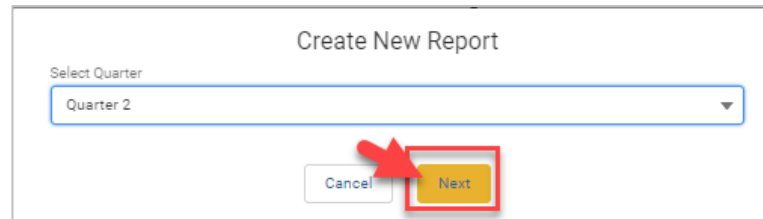
Select Quarter

Select an Option

Quarter 2

Quarter 3

5. Click the **Next** button



Create New Report

Select Quarter

Quarter 2

Cancel Next

6. Input a title in and click the **Save** button



New Progress Report: AB 628 Breaking Barriers to Employment Initiative

* = Required Information

Information

Progress Report ID Grant

Quarter G-0127

Quarter 2

Title

Title

Test

Cancel Save Save

CAL-E-GRANTS REFERENCE GUIDE: PROGRESS REPORT

7. Fill in the fields for each **Narrative** section.

Once complete, click the **Save** button and then click on the **Submit** button

Note: Text entry boxes are larger in the system; they have been cut down for the purpose of these training materials

Each entry box also has a 3000 character limit

Progress Report PR-0627

Submit New Note Edit

Created Submitted Approved Denied

Details Narrative Notes Documents

Please do not copy and paste images to text boxes. Images can be uploaded in the Documents tab and referred in the narrative box.

Section 1:

1

2

3

8. Click **Confirm** to move forward

Are you sure you want to submit Progress Report?

Confirm Cancel

9. An error message will occur if any require files are missing data

Please make all necessary corrections to move forward

Error Messages

Please enter the answer of

CAL-E-GRANTS REFERENCE GUIDE: PROGRESS REPORT

10. Once submitted, the report will not be the **Submitted** status

The screenshot displays the 'Progress Report' interface for report PR-0627. At the top, there are buttons for 'Submit', 'New Note', 'Edit', and a dropdown arrow. Below this is a horizontal progress bar with four stages: 'Submitted' (highlighted with a red box), 'Approved', and 'Denied'. The 'Submitted' stage is represented by a blue arrow pointing right, while the others are grey. Below the progress bar are tabs for 'Details', 'Narrative' (selected), 'Notes', and 'Documents'. A note below the tabs states: 'Please do not copy and paste images to text boxes. Images can be uploaded in the Documents tab and referred in the narrative box.' A 'Save' button is located at the bottom right.