

Access Your Grant(s) and Verify Your Contacts

Click Awarded Applications tile to find your current, active grants. Click the **Open** button to view the award details. Click the Project Contacts tab and **verify your institution contacts**: signing official, fiscal contact, and C&G officer.

Update Institution Contacts, If Needed

To update your institution contacts, click the Budget tab and Open the budget. Click “Update Institution Contact”.

- Click in the “Search and select” field and begin typing the name of your new contact. Click to select the appropriate name from the dropdown list. The contact must be from your institution. **Note:** the PI can’t be the signing official.
- Click “Save Draft”, and then click “Submit Update”.

Progress and Fiscal Reports

We no longer use PDF report forms for progress reports and fiscal reports. The PI is responsible for completing progress reports, which should be submitted to the institution C&G officer to approve and submit to RGPO. The Institutional Fiscal Contact is responsible for completing fiscal forecasts and fiscal reports and submitting them to RGPO. To complete a progress report or fiscal report, click the **Deliverables** tile on the Home screen. Click the Open button to edit the activity.

Please note: Access to a report is based on the user’s role and the activity’s status. Other roles may view the activity, but only people with the appropriate role may edit or submit it. For example, an activity in status “Fiscal Officer Input” means that the fiscal officer should complete the fiscal details and submit the report to RGPO. The PI may view the activity.

Update Assurances, As Needed

RGPO requires proof of continuous coverage for the life of the grant; therefore, we ask grantees to add a new assurance approval letter after the previous term has expired. There are two methods to update assurances: Via Progress Report or Deliverable.

Via the Progress Report

Open the progress report from the Deliverables tile on the Home screen. Scroll down to the Assurances section (Animal Use, Human Subjects Use, Biohazard Use, etc.).

- Click the Add button to add a new assurance approval letter. Complete the form and click “Save Draft”.
- Click the Assurance Upload icon and the approval letter. Click Submit.

Via Deliverable

- Open the activity from the Deliverables tile on the Home screen. Complete the form and click “Save Draft”.
- Click the Assurance Upload icon and the approval letter. Click Submit.

Key Reminders

- Click “Save” or “Save Draft” regularly when working on your deliverables in order to save your work.
- Click the Submit button to forward the activity to the next designated recipient.
- The PI can’t be the signing official.

Having Trouble?

If you're having trouble finding your active grants, updating contacts, or submitting reports, please contact your assigned **portfolio analyst** or email rgpogrants@ucop.edu.