



## Chapter 10 – Copy Forward and Copy Functions

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### How to Link Reports—Returning Reporters

If you are reporting on an award from one reporting cycle to another, it is imperative that you link the current cycle's report to the previous reporting cycle's report so all the information is tracked through the reporting cycles until the project is completed. If a report on an award from one reporting cycle is not linked to a report on that same award in the current reporting cycle, the reports can appear as if they are duplicates when the data is displayed on Recovery.gov.

Follow the steps outlined in this chapter to link reports online or using the Excel spreadsheet or by XML.

The following conditions must exist to successfully copy forward:

- You must be registered
- You must be able to log on to FederalReporting.gov
- You must have created a draft report or submitted a report to FederalReporting.gov
- The reporting cycle must be Initial Submission



## How to Copy Forward a Previously Submitted Report

- Click “Prime Recipient” or “Sub Recipient” in the Quick Links in the left sidebar
- At the My Reports View, enter the following search criteria and click “Search”
  - Calendar Year = Select a Calendar Year
  - Calendar Quarter = Select a Previous Calendar Quarter
  - Report Status = Select Submitted

**My Reports - Prime Recipient View**

**Search Filters**

**Award Type:** All  **Award Number:**  **DUNS Number:**

**Calendar Year:** 2009  **Quarter:** 4  **Report Status:** All

**Awarding Agency Code:**  **CFDA Number:**

[Search Tips](#)

- You will see all reports meeting the search criteria with the following information for each report:
  - Award Type
  - Prime Award #/Order #
  - Prime DUNS #
  - Status
  - Award Amount
  - Sub Recipient Count



- Choose the report you want to “copy forward” and click on the link in the Prime Award #/Order # field.

### My Reports - Prime Recipient View

**Search Filters**  
Award Type:  Award Number:  DUNS Number:   
Calendar Year:  Quarter:  Report Status:  Review Status:   
Awarding Agency Code:  CFDA Number:  Govt Contracting Office Code:   
 [Search Tips](#)

**Search Results** [Search Results Legend](#)  
14 reports found, displaying 6 to 10.  

Award Type	Prime Award # / Order #	...
G	<a href="#">primegrant01142010-158a</a>	001225114
G	<a href="#">primegrant03042010-402p</a>	001225114
G	<a href="#">primegrant03042010-416p</a>	001225114 S \$98976666.00 0
G	<a href="#">primeGrantDraft/924140p</a>	002512481 S \$.00 1
G	<a href="#">primegrantExcel/924400p</a>	002512481 S \$510000.00 0

Click the Award Number link to open the desired report.



- Click “Copy Forward” on the report.

The screenshot shows the 'Prime Recipient Reporting' interface. At the top, there are two tabs: 'Prime Recipient' (selected) and 'Sub Recipients'. Below the tabs, the title 'Prime Recipient Reporting' is displayed. To the right of the title, there are two links: 'Download PDF' and 'Download Report Comments'. A blue callout box with a white arrow points to a 'Copy Forward' button. The text inside the callout box reads: 'Click the “Copy Forward” button to start the Copy Forward process.' Below the button, the section 'Prime Recipient Data' is visible. It contains a link to 'field information page' and a note: 'All fields marked with an asterisk (\*) are required unless otherwise noted.' Below this is a 'Report Information' section with a table:

Award Type	Award Number	Calendar Year / Quarter
Federally Awarded Contract	Contract_Prime1	2009 / 4

Below the table, there are two fields: 'Final Report' with a dropdown menu set to 'No', and 'Order Number'.

- You will see a confirmation box asking, “Are you sure you want to leave this report? (This means you will leave the report in the new quarter, NOT that you are navigating away from the report) You will lose any data that you have updated, including Sub Recipient and Vendor data.”
- Click “OK” to continue to the Copy Report Forward page.

**NOTE: No data will be removed from the previous quarter report.**

- In the Copy From box, the Award #, Prime DUNS, Order #, Award Type, and Calendar Year/Quarter have been pre-populated.

**If you enter the Award number or the DUNS number incorrectly, you will create a new report. You will not link the reports.**



- In the Copy To box, enter the Award # and Prime DUNS exactly as it appears in the Copy From box.

**Copy Report Forward**

Specify the business key values for the "Copy To" report below business key. The Calendar Year and Calendar Quarter for the report are populated with the current reporting year and quarter.

**Copy From**

Copy all report data from the report identified by the following business key values:

Award Number HI\_aaa  
Prime DUNS 123456789  
Order Number 030405  
Award Type Federally Awarded Contract  
Calendar Year / Quarter 2009 / 4

**Copy To**

Copy to a new report identified by the following prime data fields.

Award Number   
Prime DUNS   
Order Number   
Award Type Federally Awarded Contract  
Calendar Year / Quarter 2010 / 1  
Is this a continuation of a January 2010 report?  Yes  No

- Prime recipients have the option to copy forward the sub-recipients reports connected to the prime's report being copied forward. To do so, select "Including Sub Recipient Report."
- Select the copy forward intention of this report. Recipient and sub-recipient has the option to continue the previous reporting cycle's report or to copy information from the previous reporting cycle's report.

**NOTE: For grant and loan awards, prime vendors will automatically be copied over. The prime does not have an option to exclude vendors.**

- Click "Confirm Copy"



- Review the pre-populated data and then update or modify the data fields that you are allowed to update or modify.

**You CAN NOT change the Award #, the DUNS number, or the Award Amount in the copied forward report.**

## How to Modify a Copied Forward Report

If you are a prime recipient, you will see a report with three tabs: Prime Recipient, Sub Recipients, and Vendors.

If you are a sub-recipient, you will see the Sub Recipients tab and a Vendors tab.

Reports are modified or updated in the same way as you originally entered the data. See Chapter 6 for additional details.

## How to Save a Copied Forward Report as Draft or Submit as Initial Submission

When you have completed updating the copied forward report you have two options. You can save your report as a Draft or submit it as Initial Submission.

- **Saving as a Draft**
  - Click “Save as Draft” on the Prime Recipient tab or on the Sub Recipient tab depending on your reporting type

The screenshot shows the FederalReporting.gov website interface. At the top, there is a navigation bar with links for Home, About, Downloads, FAQ, and Help. Below this, there are two tabs: 'Prime Recipient' (selected) and 'Sub Recipients'. The main content area is titled 'Prime Recipient Reporting' and contains a 'Save as Draft' button. A blue callout box with an arrow points to this button, containing the text: 'Click the “Save as Draft” to Save a Copied Forward Report as Draft.' Below the button, there is a section for 'Prime Recipient Data' with a link to 'field information page'. A table titled 'Report Information' displays the following data:

Award Type	Award Number	Recipient Type
Grant	GSA-037-K7	Prime Recipient [Prime reporting for self and Sub(s)]

Below the table, there is a 'Final Report' dropdown menu set to 'N'.

- You receive a message asking if you are sure you want to leave this form (meaning, leave the report as you have modified it) and save as draft.
- Click “OK” to save the copied forward report as a new report in Draft for the current reporting quarter.



- o You will see confirmation that the report has been saved.

**NOTE:** There is no requirement for you to save a report as a Draft. If you have all of the data you need for Initial Submission, you can bypass Draft and submit your report directly as Initial Submission at any time prior to the end of Day 10 of the reporting cycle.

**If you choose to report as a prime recipient or you are a prime submitting for yourself and sub-recipient(s), the “Save as Draft” button is located on the “Prime Recipient” tab. If you are a sub-recipient the “Save as Draft” button is located on the “Sub Recipients” tab.**

- **Submitting as Initial Submission**

Reports must be submitted as Initial Submission no later than the end of the Initial Submission phase.

- o After updating the copied forward draft, click “Submit” if you do not wish to save the report as Draft.
- o If the report was previously saved as a Draft, click on Prime Recipient or Sub Recipient in the Quick Links box in the left sidebar to go to the Prime Recipient Reporting page.
- o If you are a sub-recipient, click on the Sub Recipient tab.
- o Click “Submit.”



If there are any errors in your report, you will receive an error notification. Correct the errors and click “Submit” to go to the Confirm Initial Submission page.

- o Enter the 9-digit FRPIN for the DUNS number displayed. If you enter an invalid FRPIN, you will receive an error message.
- o Click “Submit. Click “Cancel” if you wish to cancel submitting the Initial Submission. You will be returned to your report entry screens.



Depending upon the file size, it may take a few moments to process your Initial Submission. You are notified on the page that processing is taking place. When the submission is completed you will see the Report Submitted for Processing message.

**The “Copy Forward” function is used only when copying a report  
*from the previous reporting cycle.***

### How to Copy a Report

- Click “Prime Recipient” or “Sub Recipient” in the Quick Links in the left sidebar
- At the My Reports View, enter the following search criteria and click “Search”
  - Calendar Year = Select the current year
  - Calendar Quarter = Select the current quarter
  - Report Status = Select Submitted

Only reports from the current quarter can be copied with the Copy function

- Select the report to be copied and click “Copy.” Click “OK” to go to the Copy Report page.
- Change one of the following fields:
  - Award #
  - Prime DUNS number
  - Order # (for federal contracts)
  - Add Sub Recipient Reports.
- Click “Confirm Copy” to go to a sub-recipient report or a prime recipient report with Sub Recipient and/or Vendor tabs.
- Modify other information in the report.
- To save the report, click “Save as Draft.”
- To submit the report, click “Submit” to go to the “Confirm Initial Submission” page.
- Enter the FRPIN and click “Submit.”

**The “Copy” function is used only when copying a report  
*from the current reporting month.***



## How to Change the Business Key -- Online

If you submitted a report in one reporting cycle and found an error in the Prime DUNS number, Prime Award ID, Order #, or Sub Award I fields (Business Key) after the Continuous Quality Assurance (QA) period, you can correct the report in next reporting cycle and still create a link to the previous report.

FOR EXAMPLE: When reporting in January 2010, you entered the Award # as 1234. After the close of the Continuous QA period, you find that the Award # is actually 123. You can make the correction in April 2010 and link the updated April report to the one from January 2010 by following the steps below:

- Click “Prime Recipient” or “Sub Recipient” in the Quick Links located in the left sidebar.
- At My Reports View, you will enter the following search criteria and click “Search”:
  - Calendar Year = Select Current Reporting Calendar Year (such as 2009)
  - Calendar Quarter = Select Current Reporting Quarter (such as 3)
  - Report Status = Select either Submitted or Draft

### My Reports - Prime Recipient View

**Search Filters**

Award Type:       Award Number:       DUNS Number:

Calendar Year:       Quarter:       Report Status:      

Awarding Agency Code:       CFDA Number:       Reporting Agency Code:

     [Search Tips](#)

**Search Results**

[Search Results Legend](#)

14 reports found, displaying 6 to 10.      [\[First/Prev\]](#) [1](#), [2](#), [3](#) [\[Next/Last\]](#)

Award Type	Prime Award # / Order #	Prime DUNS #	Status	Award Amount	Sub Count
G	<a href="#">primegrant01142010-158a</a>	001225114	S	\$1314500400.00	0
G	<a href="#">primegrant03042010-402p</a>	001225114	S	\$1314500400.00	0
G	<a href="#">primegrant03042010-416p</a>	001225114	S	\$98976666.00	0
G	<a href="#">primeGrantDraft/924140p</a>	002512481	S	\$0.00	1
G	<a href="#">primegrantExcel/924400p</a>	002512481	S	\$510000.00	0

Select current calendar year and quarter



- You will see all the reports that meet the search criteria entered.
- Click on the link in the Prime Award#/Order# to go to the Prime Recipient Reporting page where the following is displayed:
  - Award Type
  - Prime Award#/Order#
  - Prime DUNS #
  - Status
  - Award Amount
  - Sub Recipient Count
- Click “Change Key.” You will see a confirmation box asking “Are you sure you want to leave this report? (This refers to leaving the report information, not that you will navigate away from the report) You will lose any data that you have updated, including Sub Recipient and Vendor data” – Click “OK” button to go to the Change Business Key page.

The screenshot shows the 'Prime Recipient Reporting' interface. At the top, there are three tabs: 'Prime Recipient', 'Sub Recipients', and 'Vendors'. Below the tabs, the title 'Prime Recipient Reporting' is displayed. To the right of the title, there are two links: 'Download PDF' and 'View or Add Report Comments'. Below the title, there are five buttons: 'Copy', 'Save as Draft', 'Submit', 'Deactivate', and 'Cancel'. The main section is titled 'Prime Recipient Data' and contains a link to 'field information page' and a note that all fields marked with an asterisk (\*) are required. Below this, there is a 'Report Information' section with a table:

Award Type	Award Number	Calendar Year / Quarter	Final Report
Grant	H985GH14J	2009 / 4	No

Below the table, there is a blue callout box with the text: 'Click the “Change Key” button to start the Change Key process.' An arrow points from this box to a 'Change Key' button located at the bottom right of the form.



- The Change From portion displays the data for the award you selected
- In the Change To portion, you can change the Award #, Prime DUNS number and Order #.
- Review that the Change From and Change To Calendar Year/Quarter are correct. Click “Confirm Change Key to go to the “Confirm Deactivation” page.

### Change Business Key

Specify the business key values for the "Change To" report below. The Calendar Year and Calendar Quarter for this report will automatically be populated with the current reporting year and quarter. Note that any comments for this report will be lost in this process.

**Change From**

This business key will be modified to the "Change To" business key entered below.

**Award Number** H985GH14J  
**Prime DUNS** 123456789  
**Award Type** Grant  
**Calendar Year / Quarter** 2009 / 4

**Change To**

The "Change From" business key above will be modified to this business key.

**Award Number**   
**Prime DUNS**   
**Award Type** Grant  
**Calendar Year / Quarter** 2009 / 4

Click “Confirm Change Key”  
to then deactivate your report.

After changing the business key, you must deactivate the previous report.



When the business key is changed, the previous report must be deactivated.

- On the Confirm Deactivation page, you will see data from the previous report. Verify that this is the correct report. Enter the FRPIN and click “Deactivate.” Sub-recipients and vendors associated with the deactivated prime recipient report and sub-recipient vendors will also be deactivated.
- You will now see the report with the new changed data.
- Enter the FRPIN for the DUNS number for which you are reporting. If you enter an invalid FRPIN you will receive an error message.
- Click “Submit” to submit your report as Initial Submission status. Click “Cancel” if you wish to cancel the action of submitting the Initial Submission. You will be returned to your report entry screens.

### Confirm Deactivation

In order to change the business key of this report, the old copy of the report must be deactivated. Please enter the FRPIN for the specified DUNS below to do so. The old "From" version of the report (for the specified business key below) will not be deactivated until you submit the new "To" report.

**Report Information**

Award Type	Award Number	Sub Award Number	Prime DUNS
Grant	H985GH14J		123456789

**Calendar Year / Quarter**  
2009 / 4

*You are deactivating a report.*

**DUNS Number** 123456789  
**FRPIN**

Click the “Deactivate” button to confirm deactivation.

Depending upon the file size, it may take a few moments to process your Initial Submission. You are notified on the page that processing is taking place. Once the submission process has been completed, you will receive confirmation that the report has been submitted.



## How to Change the Business Key in Excel or XML and Batch

If you submitted a report in one reporting cycle and find an error in the Prime DUNS number, Prime Award ID, Order #, or Sub Award ID fields after the Continuous QA phase, you can correct the report in the current reporting cycle and create a link to the previous report.

Follow these steps:

- Click “Prime Recipient” or “Sub Recipient” in the Quick Links in the left sidebar
- At the My Reports View, enter the following search criteria and click “Search”
  - o Calendar Year = Select a Calendar Year (such as 2009)
  - o Calendar Quarter = Select a Previous Calendar Quarter
  - o Report Status = Select Submitted

The screenshot shows the 'My Reports - Prime Recipient View' page. The search filters section includes: Award Type (All), Award #, DUNS #, Report Status (All), Fiscal Year (2010), Fiscal Quarter (1), Review Status (All), Awarding Agency Code (1549), CFDA Number, and Govt Contracting Office Code. The search results section shows 3 reports found, displaying all reports. The table below is a representation of the search results shown in the screenshot:

Award Type	Award # / Order #	DUNS #	Status	Award Amount	Sub Count
C	<a href="#">FLE-12-7k / 78-f</a>	809396781	S	\$379220.00	1
C	<a href="#">FL-47x / 11-482</a>	809396781	S	\$285000.00	0
C	<a href="#">LAK-782-12 / 118-74</a>	809396781	S	\$20500000.00	4

- You will see all reports meeting the search criteria with the following information for each report:
  - o Award Type
  - o Prime Award #/Order #
  - o Prime DUNS #
  - o Status
  - o Award Amount
  - o Sub Recipient Count



- Choose the report you want to “copy forward” and click on the link in the Prime Award #/Order # field.
- Click “Copy Forward” on the report. Make the necessary change(s).
- Submit your file or batch of reports

