HUD Office of Healthy Homes and Lead Hazard Control
Quarterly Progress Reporting System
Online User Guide

Contents:

I. Getting Started and System Requirements

- To minimize scrolling, set your display screen resolution to 800x600 or higher when using this system.

- To take advantage of all the system's tools and features, please rely first on the navigation links and buttons ***within*** the online report. However, in some circumstances you will need to use your browser's "Back" and "Forward" buttons on the navigation bar at the top of your screen.

- Before starting to fill out the report, gather the information and supporting materials needed to complete your Progress Report for the current reporting period. If you have supporting documents or other material related to your quarterly report that cannot be submitted online using this reporting system, please e-mail this information to your Government Technical Representative (GTR).

- Due to variations between the major Internet browsers, the online system may perform differently under some configurations. If you encounter "Error Messages" when trying to access the system, or during a session, first try "refreshing" the screen by pressing the Refresh or Reload buttons on your browser. If the error message persists (e.g., Error 500 or Error 404), follow the guidance in Part II or the FAQ of this document for information about different error messages.

- As a Precaution: **Save your work frequently** (at least every 10 to 20 minutes) following the instructions in Part III below.

- To prevent data conflict and to maintain the integrity of the overall report, only **one user** should access a report at a time.

If you have difficulty accessing the Web-based quarterly progress reporting system, contact the HUD Office of Healthy Homes and Lead Hazard Control (OHHLHC) by calling (xxx) xxx-xxxx, by e-mailing granteequarterly@hud.gov or sending a fax (202) 755-1000 with your grantee number, contact information, and a detailed explanation of your difficulty.

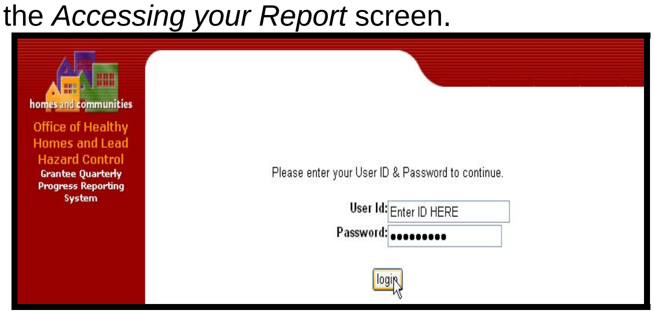
II. Entering the Reporting System and Starting New Reports

Enter HUD's OHHLHC *Grantee Quarterly Progress Reporting System* by accessing the homepage at http://www.hud.gov/offices/lead/ and clicking on "**Quarterly Progress Reporting System**" under "**HUD Resources**".

> ***Please Note***: If you are *using the system for the first time, you may experience an initial delay downloading the site. This is normal and should not result in future delays in accessing the system.*

1. From the Welcome Page, use the mouse to click to **enter** the reporting system.

2. When prompted, fill in your assigned **username** and **password** and click "Log In" to enter the system. This will take you to the *Accessing your Report* screen.



(*Remember that your username and password are case sensitive)*

3. When using the system, you may see one "Open" report for the current reporting period on the *Accessing Your Reports* screen. If not, you can manually create a new report by clicking on the "Create Blank Report" button 

on the horizontal tool bar above the list of reports on the screen after you log in.

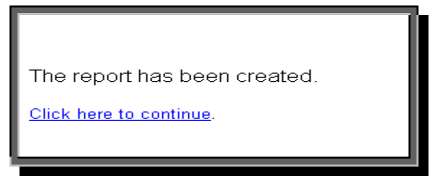
   Select the radio button for the appropriate quarter and type in the last two digits of the year. The quarter selected indicates the quarter you are reporting for, not the current month in which you are completing the report. For example, if you are completing your April – June quarterly report in the month of July, you must select the April – June quarter, not July – Sept, to generate a quarterly report that is associated with April – June reporting period.

   Click on "Create Blank Report" again and you should receive a screen confirming that the new report has been created and a link to access this report.

What to do if you receive a System Error Message

- If you receive a **System Error Message (e.g., HTTP 404 or HTTP 500)**, then there are internal errors on the server (i.e. you have connected to the system, the server received the request, and for some reason the server was unable to service the request). When this occurs, try accessing the system again in 10 minutes. If you still receive the error messages after 10 minutes, you should write down in as much detail as possible such as:
  1. What page you were using when receiving the message (Part 1A, Part 1B, etc.),
  2. The fields you most recently changed on that page, and
  3. The button you clicked immediately prior to receiving the error.

Contact the granteequarterly@hud.gov or the OHHLHC Help Desk at (703) 741-7022 to report the error.



If you have created a quarterly report in error, or experience technical difficulties, contact the OHHLHC Help Desk or granteequarterly@hud.gov to have the report removed and/or help troubleshooting errors.

- ➢ The most current, active report will be designated by an "Open" link. This is the report that your staff **must** complete during the designated reporting period.

5. To view and **begin work on the "Open" report** click on the "Open" link next to the date.

- ➢ This report will remain "Open" and available to edit until you submit it to HUD (see Part IV).
- ➢ There may be Multiple "Open" quarterly reports, however, there should only be one "Open" report for the given report period. Be sure that you are accessing the proper report link for the reporting period you wish to complete.
- ➢ Once a report is submitted to HUD, the report is "Closed" and becomes read-only. No changes can be made to this report once the report is "Closed."

III. Using the Reporting System

Once your current report is opened, the system will bring up the ***Quarterly Report Narrative Overview*** page. This page includes some data entry fields and links to **Part 1A, Part 1B, Part 1C, Part 1D, Part 2 and/or Part 3** of the report. Please be advised, available Parts will vary per Grant Program.

1. Note that there are 5 important buttons in the top, red navigator menu. These buttons are discussed below in more detail. They are:
   - ➢ Save Changes
   - ➢ Save and Close
   - ➢ Pre-submission Check
   - ➢ Send to HUD
   - ➢ Close

2. Continue scrolling down to the *Quarterly Report Narrative Overview* heading. Below the heading is a link to the General Instructions for the Program Narrative Response. These General instructions will give clear guidance on how to make your data entries. Click this link and briefly review the instructions before beginning your report.

3. An e-mail link **granteequarterly@hud.gov** is available to transmit tables, graphs, and other attachments or supplemental information related to this quarterly report than cannot be attached to the online report. If you decide to use this option always make sure to CC a copy to your GTR.

4. For those Grant Types that have "Start Up Activities" (Section A1.), indicate the Status of the start-up activities (Not-yet-started, In-progress or Completed) by selecting one category for each activity displayed. The Completed Date field can be completed using the specified date format (mm/dd/yyyy) for those Activities that have a definitive finished date. Comments on your progress can be addressed in the narratives that follow.

Activity	Status (select one category for each activity)	Completed Date (list mm/dd/yyyy for date completed)
Quality Assurance Plan Submitted and Accepted (if applicable)	Not-yet-started In-progress Completed	

5. Scroll down to Item A2; use the mouse to place the cursor in the box and click to activate the cursor in this cell. Type in the Narrative information for this item of the report.

A2. **Personnel Changes.** Describe any changes in key personnel in the project/study and among sub-grantees or other entities directly involved in your grant project/study and its imp
Please identify any staff hired and address how current staffing levels compare to your work
Provide information on any new project/study participants, including resumes of key individu
letters of commitment, Memoranda of Understanding (MOUs) or other arrangements with community-based organizations and other partners.

[use previous quarter response] [Help] [Top of Page]

Q-Tip:
The narrative field provides you with the option of using the response from the previous quarter.

- To test this feature, click on the "use previous quarter response" link when it is available. This option cannot be used unless a submitted (and "Closed") Web-based report is available from the previous quarter.

- For first-time users of the system that cannot use responses from previous quarters, you may want to "copy and paste" information you have in other source documents and which were used in preparing your previous quarterly reports.

6. Press the TAB key four times or use the mouse to move the cursor from Item to Item (e.g. Item A1 to A2).

To **save your changes** at any time, click the "Save Changes" button Save Changes at the top of the screen. We recommend that you save your work every 10-20 minutes.

Navigation Tips and Hints

- To **navigate between system links and required reporting fields**, use the TAB key, or use your mouse to click inside data cells and highlight the existing entry. Fields requiring information are indicated by open text boxes that allow data entry.

- To **scroll up and down** through screens, use the arrow keys or scroll bar on the right side of the screen. If the keys are not active, use the mouse to click in an area of the report that is outside a data cell to activate these keys.

- To **return to the top of the screen** at any time, click on a "Top of Page" link. These links are found near each question in the quarterly report.

- To **navigate between sections of the report**, click on the appropriate section link near the top or bottom of the screen.

- **To return to the report** from the Program Narrative Response Instructions, use the "Back" button on your browser's toolbar.

- **To return to the report** from the Help text or the Pre-submission Check Report, click on "Close" in the browser window.

7. After entering all data for Part 1A, click on the link for Part 1B, 1C, 1D, and/or Part 2, repeat for all Parts until all report sections are complete. As a suggestion, you may want to complete Part 3 **only** after all other information has been entered and saved.

   Q-Tip:

   In **Part 2**, Listing of Units Completed and Cleared, **DO NOT USE COMMAS IN THE NUMERICAL FIELDS.** Doing so may result in system errors (see above).

   Q-Tip:

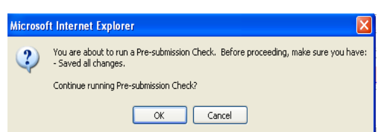
   For those grants that do units, there is a consistency edit that says the same number of units completed and cleared for the quarter reported in different places must be the same. This means that cell C5i must equal C6a + C6b + C6c + C6d and must equal the number of units detailed in Part 2 the Listing of Units Completed and Cleared. Beware of having an extra line on your Part 2 list which specifies a state code but is zero or blank other than that! The system counts that line as a unit, and it will make your consistency check fail. If you see a line in Part 2 like that, delete it.

8. To **generate auto-calculations** in the Cumulative Total columns (e.g. Part 3), enter all data, and then hit the "Save Changes" button. The "Save Changes" button will refresh the screen and generate new values for the auto-calculation fields. Repeat this process anytime thereafter if you update data in these sections and would like to see newly calculated values. (Note that only the most recently entered data values will be used for the auto-calculation feature).

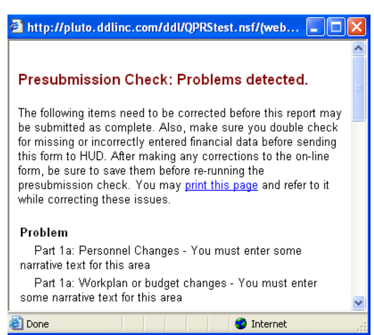
9. To **print a copy of the report**, click on the "Display Printable Version of this Report" link found at the top of each screen. A new browser window will then open with the printable version. In the new browser window, go to the File menu and select "Print." Note that some reports, especially LEAP formats, are quite wide because there are so many columns. If your printout cuts off the rightmost columns, you must change the display to a smaller font. This also causes the print font to be smaller. To do this, on your Internet Explorer Menu bar, click on View / Text Size / Smaller.

IV. Checking for Errors and Submitting/Sending the Report to HUD

1. To **check for errors WITHOUT submitting/sending the report to HUD**, simply click the "Pre-Submission Check" button at the top of the screen. You will receive a prompt asking you to be sure you have saved all changes. Click "OK".



A new browser window will open and will say your report is ok or will list the blank required fields or other errors that need to be fixed.



➢ To **fix an error**, go back to the section of the report where the error is noted and make any changes. Repeat this process until all errors are fixed.

➢ **Note that the Pre-submission Check may not address errors to financial data and zeros in numerical fields. We recommend that you check these fields directly before submitting to HUD. (**Please note that rounding is not necessary when entering financial data, e.g. $1000.31 is an acceptable entry)

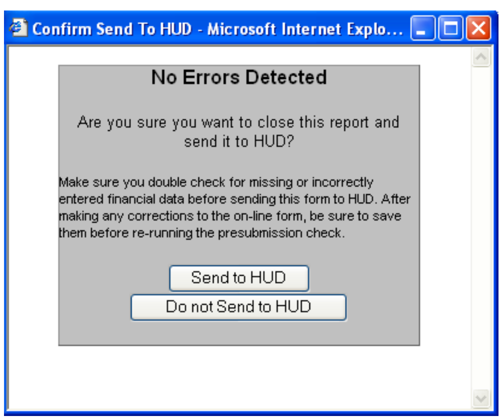
Once you have made the appropriate changes for each error, return to the Pre-submission Check browser window and click on Pre-submission Check button again, to see if the problems are corrected. Once all errors are corrected, the Pre-submission Check will state "No Problems Detected." Your quarterly report is then complete and ready for submission.

Q-Tip:
We recommend printing out the List of Errors Screen so that you can work through all errors without moving between different browser screens. This way you'll have the "checklist" handy and can work through the list of errors more directly. To print the Pre-submission Check errors you can click print this page or click [print] [re-check] [close this window] within the error message window.

Q-Tip:

If you don't see the 'Pre-submission Check' results window, you likely have a **popup blocker** running on your workstation. See FAQs Number 15.

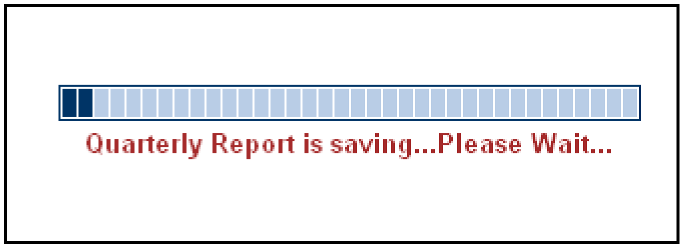
2. To **check for errors AND submit/send the report to HUD**, click the Send To HUD button. This will launch a pre-submission check (see above) and send your work to HUD once all errors are fixed. Use the process described above to review and correct errors. *Remember that reports are "closed" and become read-only once they are submitted to HUD. Be sure that you are ready to submit your work before selecting this option!* If no errors are detected, another new browser window will open giving you one last opportunity to change your mind.



Q-Tip:

If you don't see this final, 'Confirm Send to HUD' window, you likely have a **popup blocker** running on your workstation and your report cannot be sent. See FAQs Number 15.

Processing of closing the quarterly reports may take up to 1-2 minutes. Please be patient and allow the system to fully process your reports prior to moving to new sections within the system.



3. Once your report has been submitted to HUD, it will appear on your screen as "Closed". "Closed" reports are read-only and can only be edited by HUD. "Closed" reports can be accessed using your mouse to click on the "Closed" link next to the appropriate date. Please contact your GTR if you need to add information to an already closed report.

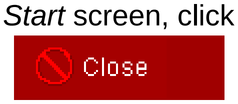
NOTE: By clicking "Send to HUD", the grantee acknowledges that the report is complete, and is the official Quarterly Progress report being submitted for their Grant Program (Lead Hazard Control, Healthy Homes Demonstration, etc.) for the given report period.

V. Exiting the System

From any of the report screens:

- Click the "Save and Close" button at the top of the screen to **exit the report AND save your changes**. Once you've returned to the System Start screen, click the "log out" button to exit the system.

- To **exit the system without saving changes**, click the "Close" button at the top of the screen (if the button is not visible, click the arrow at the right of the scroll bar until the button appears). Once you've returned to the *System Start* screen, click the "log out" button.



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= Exit

Technical or Programmatic Questions?

If you have technical questions about entering data, using the system, or if you encounter technical problems, please contact the *HUD Office of Healthy Homes and Lead Hazard Control (OHHLHC)* **Help Desk at (xxx) xxx-xxxx**. So that we may better assist you. You may also e-mail your request to **granteequarterly@hud.gov** Or **fax** it to the **OHHLHC Help Desk at (202) 755-1000.**
You will be contacted within 48 hours (2 business days) of your request.

HUD Office of Healthy Homes and Lead Hazard Control
Quarterly Progress Reporting System
Frequently Asked Questions

These FAQs were developed based on grantee questions and requests received during the first online reporting period for HUD's Lead Hazard Control Grant Program.

1. I do not have information for the Web-based system and/or my password and user id? What do I do?

HUD sent a launch package to the primary contact person for your program (usually the program director or manager). Please check with this contact person for passwords and other system information. If you *still* need assistance, please send a detailed request to granteequarterly@hud.gov and/or contact the OHHLHC Help Desk at (xxx) xxx-xxxx for assistance.

2. What happens if I do not submit my quarterly report to HUD on time?

Any voucher requests for payments made through LOCCS will NOT be paid until the quarterly report and/or final report is received by HUD.

3. How do I make changes to a "Closed Report" that has been submitted to HUD?

If you need to make any changes to your report after it has been successfully submitted to HUD, please detail your requested changes in an e-mail to your GTR and/or fax a hard copy of the requested revisions to (202) 755-1000. Allow 2-3 weeks for changes to be reflected in the online version of your report. Follow up with your GTR if needed.

4. When I enter narrative text into the report, the text is cut off at the end of the section. Why does this happen?

Internet Explorer imposes a limit of 30,000 characters per text field.

5. In Part 2, what do I enter in the apartment number field?

The apartment number field refers to the actual apartment unit address, NOT how many units were completed at that address. The system counts how many units were completed based on how many lines are used in this section. If you indicate 1-12 in the apartment number field, the system will think you completed only one unit. Therefore, if 12 units were completed at the same address, enter the address 12 separate times (can be copied and pasted), and assign an apt # for each.

6. What kind of financial data should be entered in Part 3, Financial Reporting?

Part 3 tracks the payments made to the grantee through the HUD Line of Credit Control System (LOCCS). Therefore, financial data entered in Part 3 should only reflect those grant funds actually PAID through LOCCS during the current reporting period. *(Do NOT include any amounts for expenses that were incurred during the current grant period but not yet paid through LOCCS.)*

Note also that the Office of Healthy Homes and Lead Hazard Control tracks grant fund payments based on the date a Request for Voucher Payment through LOCCS is actually paid, NOT when it is submitted by the grantee. For example, if you submit a voucher on September 26th (during the 3rd quarter) and it was actually paid on October 1 of that year, this payment should be reported in the 4th quarter, not the 3rd quarter even if it was expended and submitted in the 3rd quarter.

If you need further assistance or clarification on how to complete Part 3, please call the OHHLHC Help Desk, send an email to granteequarterly@hud.gov or contact your GTR.

7. My data was erased OR I was kicked off the system and my data was erased. What do I do?

If you experience difficulty while using the system, you should try reloading the page (click the reload button on the browser) or shut down all instances of the browser (browser windows) and restart.

If not seeing you data happens frequently, change you Internet Explorer options to always refresh pages. To do this, one your menu line, click Tools. Click Internet Options. On the General tab under Temporary Internet Files, click Settings. Under Check for Newer Versions of Stored Pages, click Every Visit to the Page. Click OK. Click OK.

Contact technical support if problems persist.

Save your work frequently to minimize lost data.

8. I received a System Error message (e.g., HTTP 404 or HTTP 500) when using the system. What does this mean? What should I do?

System errors appear when there are internal errors on the server (i.e. you have connected to the system, the server received the request, and for some reason the server was unable to service the request). When this occurs, try accessing the system again in 10 minutes. If you still receive the error messages after 10 minutes, you should write down in as much detail as possible about what page you were using, last field updated and/or changed and any links or buttons you may have clicked when the message occurred. You can report these issues to granteequarterly@hud.gov or the OHHLHC Help Desk at (703) 741-7022.

9. I am getting a system error message when using the system. Why does this happen? What do I do when and if I receive a system error message?

You may receive a system error message when there are internal errors on the server (i.e., you have connected to the system; the server received the request, and for some reason the server was unable to service the request). Therefore, when you receive a system error message, you should write down in as much detail as possible:

1. What page you were using when receiving the message (Part 1A, Part 1B, etc.),
2. The fields you most recently changed on that page, and
3. The button you clicked immediately prior to receiving the error.

You should then call the OHHLHC Help Desk or granteequarterly@hud.gov to report these issues. IT staff will assist in diagnosing the problem.

10. The system screens are not displaying properly for me and/or I'm having trouble with the system's navigation. Why is this happening?

It is possible that your browser is not compatible. Your browser should be Internet Explorer Version 4X or higher. If you are using a compatible browser, yet are still experiencing difficulties, please call the OHHLHC Help Desk or submit as much detail as possible about what you are experiencing to granteequarterly@hud.gov. Our staff will use your information to help diagnose and fix the problem.

11. Our office administers more than one grant program from the Office of Healthy Homes and Lead Hazard Control. While working in one quarterly report, I'd like to access a quarterly report for our other grant. However, I cannot access the login screen necessary to access another report. What do I do?

In order to access a different grantee quarterly report, you will need to shut down all browser instances and re-start the Web-based system. This is the only way to log in under a different grant number and access information for another grant administered by your office.

12. Do I still need to submit a SF 269 form? I do not see it on the Web.

YES! While this form is not included in the Web-based reporting system, it is available on the Web: http://www.hudclips.org/sub_nonhud/html/forms.htm in the Standard Forms section. See #13 in the FAQs below on where to submit the SF 269 form.

13. Where do I send the 269 form and/or other attachments?

Please send all attachments via e-mail to your HUD GTR.

14. The system has not automatically created a new report for me, what should I do?

You can manually create a new report by clicking on "Create New Report" on the horizontal tool bar above the list of reports on the screen after you log in. Select the radio button for the appropriate quarter and type in the last two digits of the year. Then click on "Create New Report" again and you should receive a screen confirming that the new report has been created.

15. I do not see the new browser windows you describe when I click "Pre-submission check" or when I click "Send to HUD" and my quarterly report never changes from Open to Closed. Why is this happening?

The "Pre-submission check" information and the "Send to HUD" confirmation screen are designed as pop-up windows. If your system has a popup blocker enabled, you will not be able to view this information. In most cases, your system will alert you of the pop-up blocker in which you may select to temporarily or permanently allow the window to view.

In other cases, you may see the message above. In this situation, you may temporarily disable the blocker and view the windows by holding the “Ctrl” key while clicking on the “Pre-submission check” or the “Send to HUD” buttons to view the window.

HELPFUL HYPERLINKS:

Navigating around the Quarterly Reporting System is relatively easy. Each section has a **hyperlink**, which will take you to the top of the page so you can save the information regularly. The hyperlinks at the top and bottom of the page let you move between sections of the report.

- Use the ***granteequarterly@hud.gov*** link at the top of the page to submit attachments to the quarterly report.

- If your narrative response has not changed from last month click on the **Use Previous Quarter Response** hyperlink. This can also be used if you want to pull the information from last quarter into a particular section of the report so you can edit it for this quarter.

- If you need additional instructions, click on the **Help** hyperlink located above the section you are working on.

- To add information in Part 2 select the **Add a Unit** hyperlink.

DELETING A Unit

- To delete a unit that was entered under Part 2 click on **Edit** and then click on **Delete this Item**.

ENTERING COST VALUES

The financial information to be submitted for the current reporting period in **Part 3** is based on the negotiated budget included in the HUD grant agreement (including modifications).

- When entering cost information in **Part 3** include cents (if possible) do not use commas.

SUBMITTING YOUR REPORT

You will not be allowed to submit your report until all required fields have been satisfied. **Reminder:** Information is required in all the narrative fields and table cells. If information is not entered it will trigger a pre-submission check error.

- If no activities were undertaken for the reporting period specify this in writing in the narrative fields and by entering a 0 in the table cells where a number is requested
- At the top of the page, click the **Pre-submission Check** button. This checks your report to confirm that you have filled it out completely. If it reports errors, address them before proceeding.
- Once you have reviewed your report and resolved any errors identified by the Pre-Submission check, click the **Send to HUD** button. Once your report is sent to HUD, you cannot edit it, but you can still view it.
- Once you click the **Send to HUD** button you cannot edit the report or make any changes. Review ALL parts of your created Quarterly Report to ensure the information is correct and ready for submission