FAIS Compliance Evaluation User Manual

Version 1.0

Revision History

Version	Change Description	Date
1.0	Initial Version	07/29/2011

Table of Contents

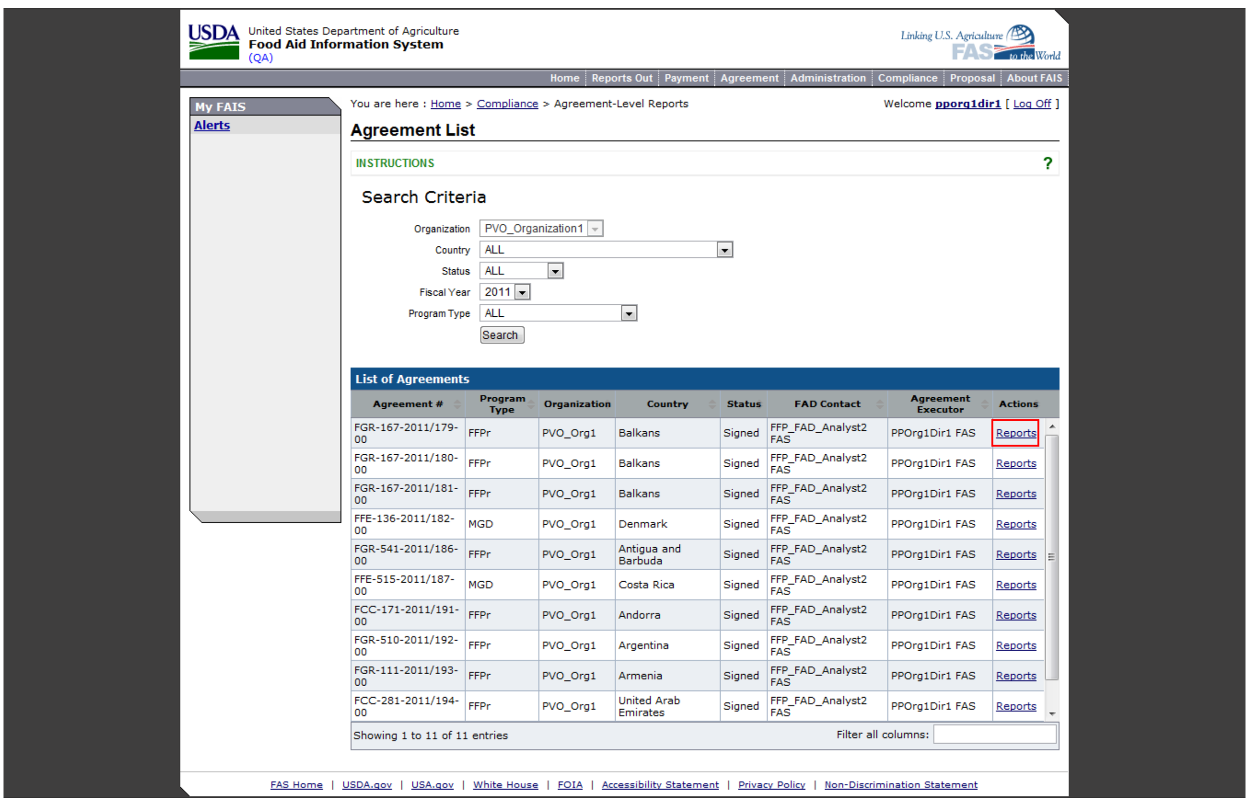
1 Agreement Level reports

The Agreement List page provides a list of agreements based on the search criteria entered in the **Search Information** section.

The list of agreements varies depending on the user type. If the user is a Food Assistance Division (FAD) user, the Organization field allows any Program Participant (PP) organization to be selected. If the user is a PP user, only their particular organization will be visible.

FAD users can view, edit and unsubmit based on the reports they select. Some reports cannot bed edited by a FAD user but can unsubmit them.

Select the **Reports** link for an agreement listed to access the list of reports for this agreement



3.1.2 Searching Agreements

To search for an agreement

1. Select the name of the Organization from the drop down list.

2. Select the name of the country from the drop down list.
3. Select the status from the drop down list.
4. Select the fiscal year from the drop down list
5. Select the program type from the drop down list.
6. Select Search to view the list of agreements matching your search criteria.

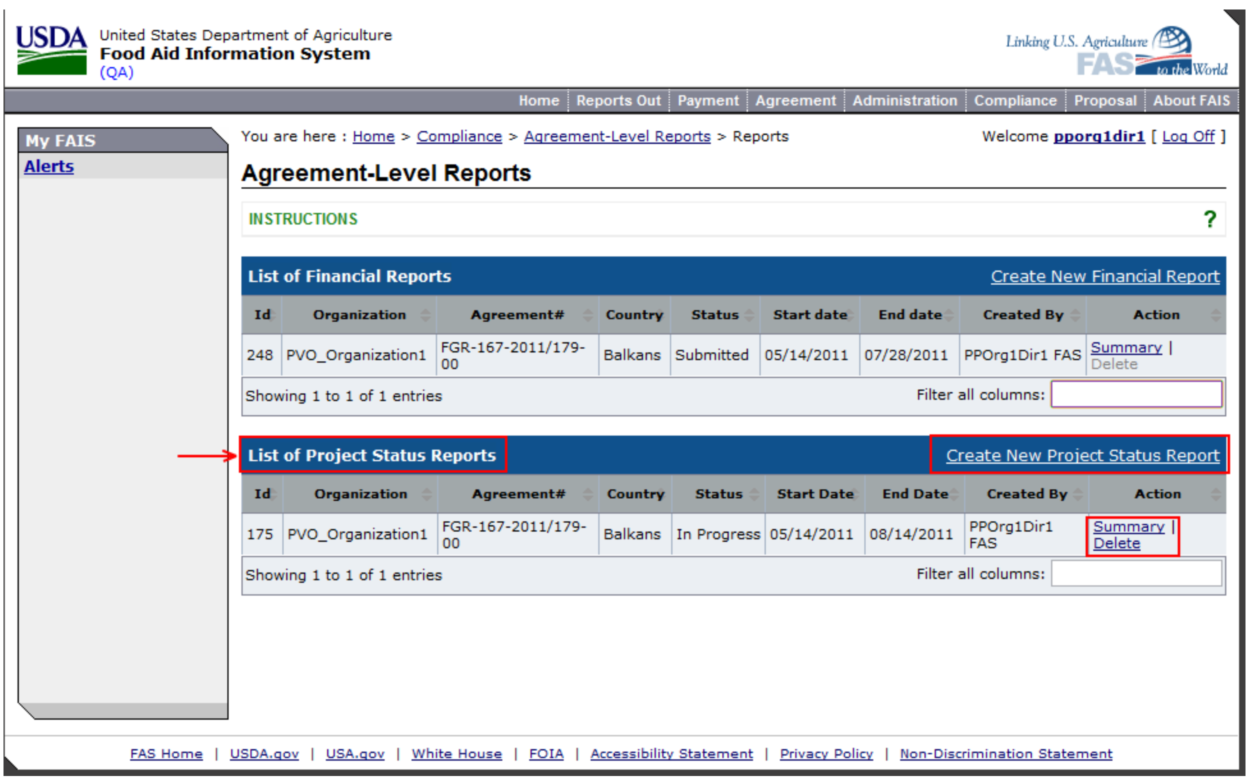
3.1.2 Viewing Agreement Reports

To view the reports for an agreement select **Reports** from the Actions column of the Agreement List. The Agreement Level report page opens up. This page provides a list of Agreement-level reports for an agreement. The agreement-level reports are:

- Financial Reports
- Project Status Reports

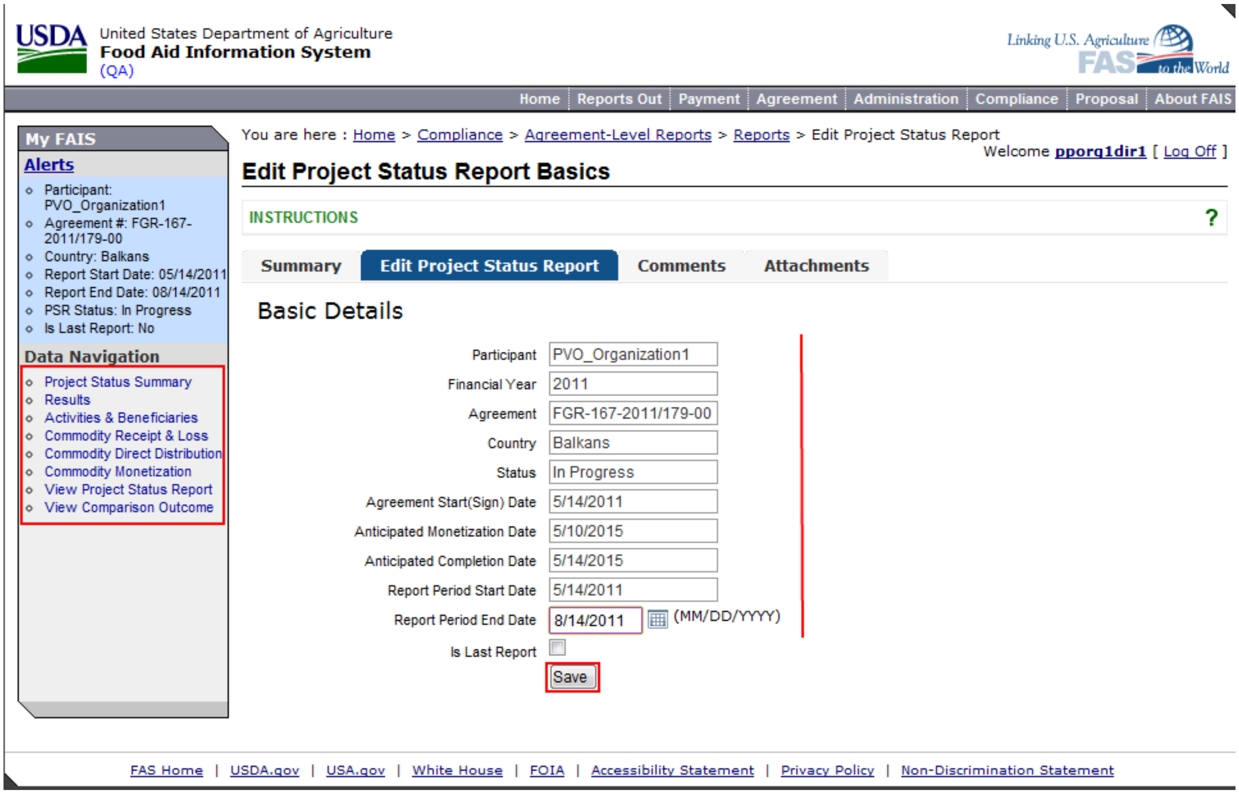
To access the report summary information of a report in Submitted or “In Progress” status select **Summary** to access the report summary information. And Select Delete to delete the report.

Agreement level reports



3.1.2 Creating New Project Status report

To create a new project status report, select **Create New Project Status report** on the Agreement-Level reports page. The Create New Project Status Report page opens.



Select the Project Status Report tab, following details are pre-populated based on the Agreement for which report is being created and cannot be changed by user:

1. Name of the Participant
2. Fiscal year
3. Agreement number
4. Country
5. Status
6. Agreement start date
7. Agreement end date
8. Report Period Start Date

   Enter the following field

9. Enter the end date of the report in the Report period End date Field.
10. Select the check box if this is the last report for this agreement.
11. Select **Save** to save the Project Status report.

3.1.2 Entering Comments

This tab is used by FAD and the Program participant to comment or communicate information pertaining to the status report.

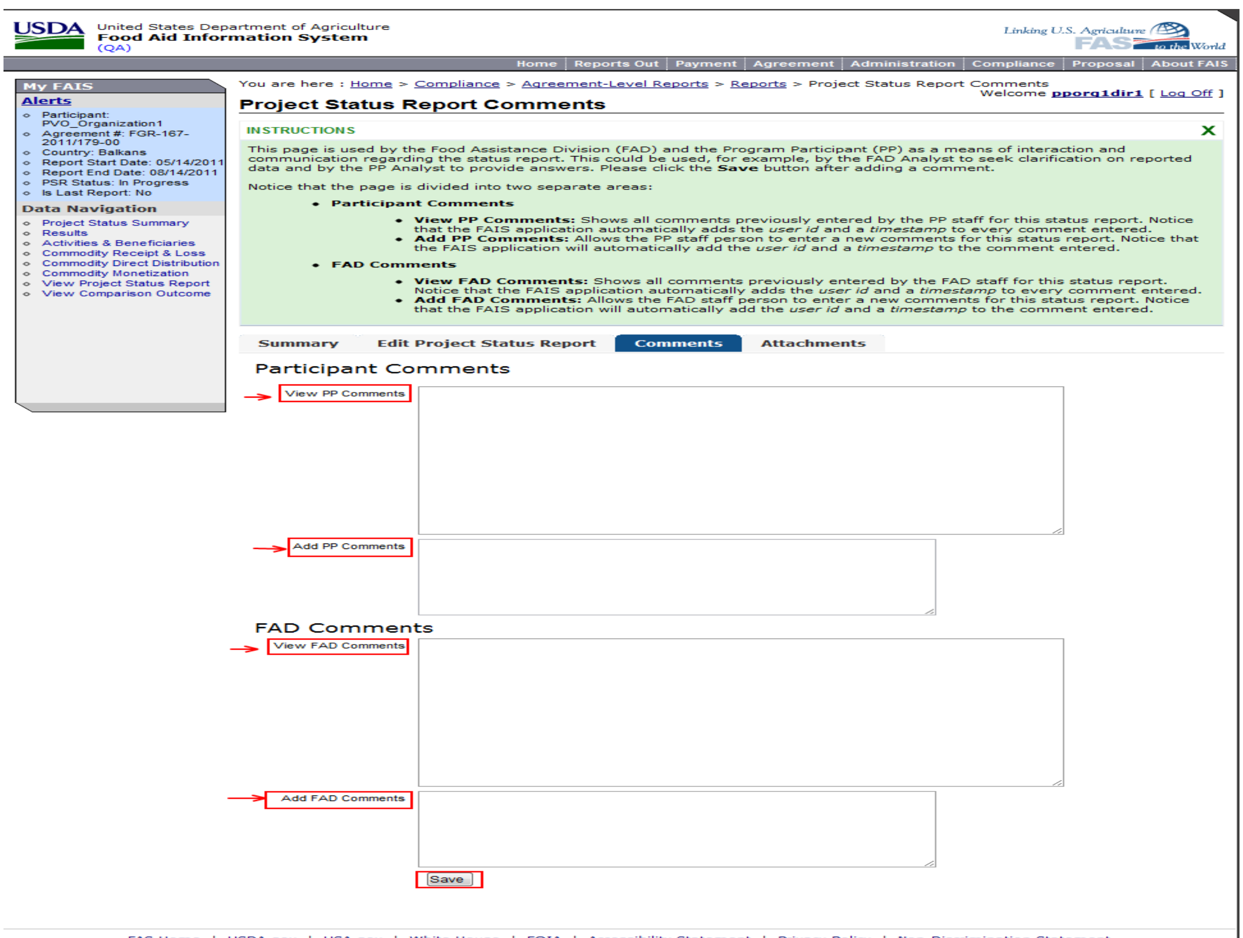
1..4.1 Viewing and Adding Comments

View PP and FAD Comments section allows you to view the comments entered by the Program Participant and the FAD user. The userid and timestamp reflects for every comment added.

To add a comment:

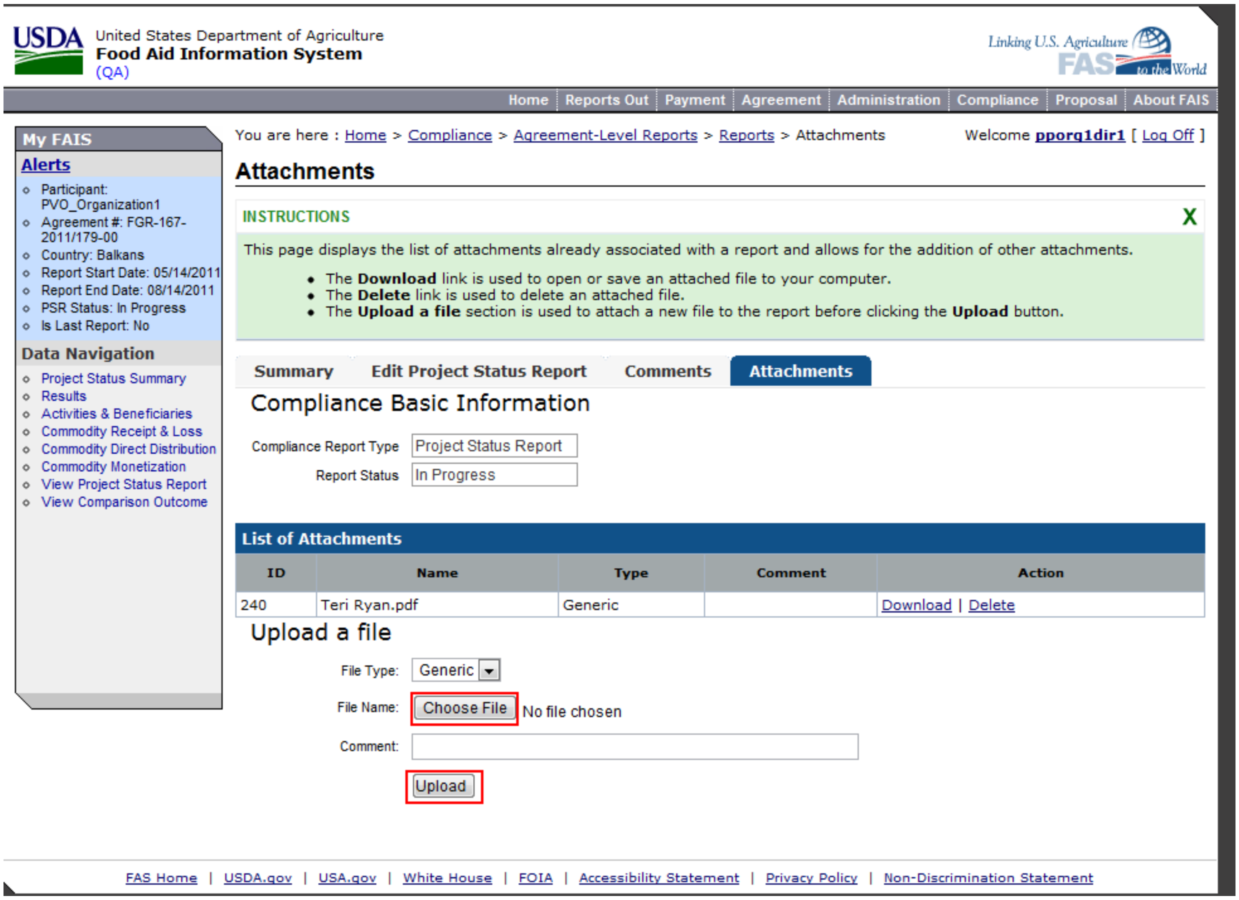
1. Enter the comment in the FAD Comments or the PP Comments section depending on the user.
2. Select Save to save the comment.

Note: The userid and the timestamp are added to the comment while saving.



3.1.2 Adding Attachments

This page allows you to attach a report associated with the agreement.

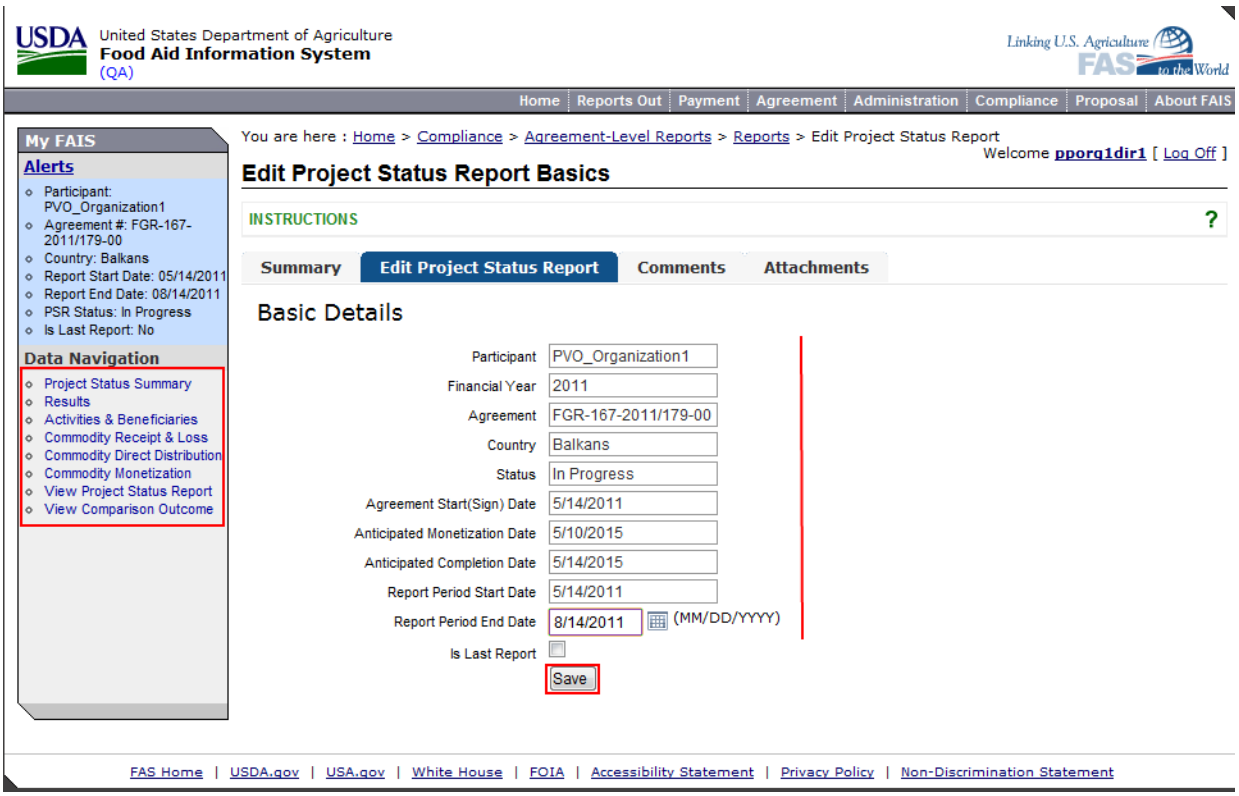


To Upload an attachment:

1. Select the file type from the drop down list.
2. Select **Choose File** to browse your local computer and select the file you want to upload.
3. Select **Upload**, to upload the file.

3.1.2 Editing Project Status report

To edit a project status report, select Summary from the Project Status report. The Summary page opens up displaying the summary of the report. To edit the basic details of the report, select the Edit Project Status report tab, the basic details opens



Select the Project Status Report tab, following details are pre-populated based on the Agreement for which report is being created and cannot be changed by user:

12. Name of the Participant
13. Fiscal year
14. Agreement number
15. Country
16. Status
17. Agreement start date
18. Agreement end date
19. Report Period Start Date

Enter the following fields:

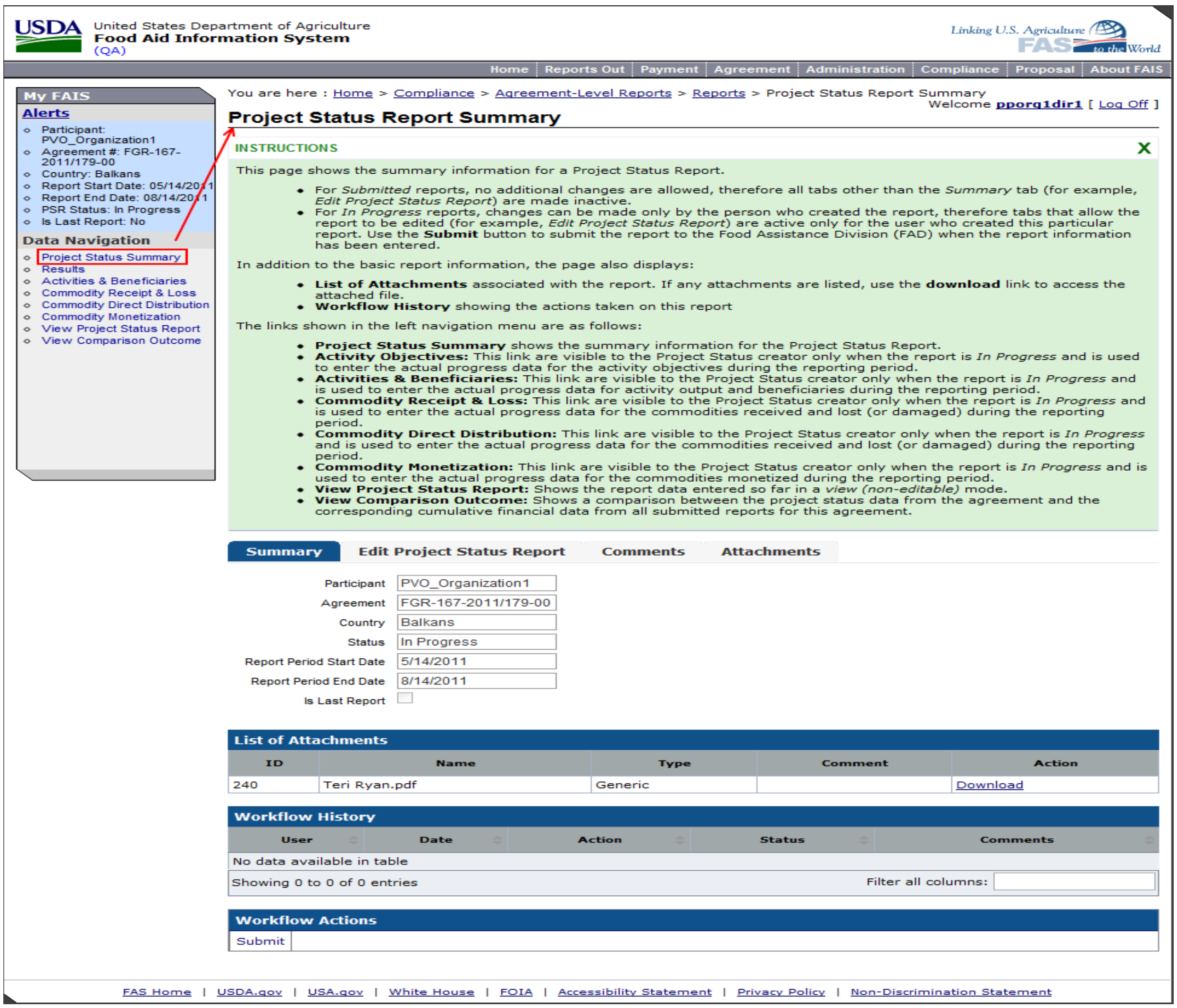
20. Enter the end date of the report in the Report period End date Field.
21. Select the check box if this is the last report for this agreement.
22. Select **Save** to save the Project Status report.

3.1.2 Project Status Report Summary

The Project Status Report Summary page shows the summary of a project status report.

The page also displays a **List of Attachments** associated with the report. To access the attachments select the **download** link to access the attached file. A Workflow History table displays the actions taken on this report.

If the report is already submitted, you will only be able to view the summary page. If the report is "In Progress" status, you can edit the status report.



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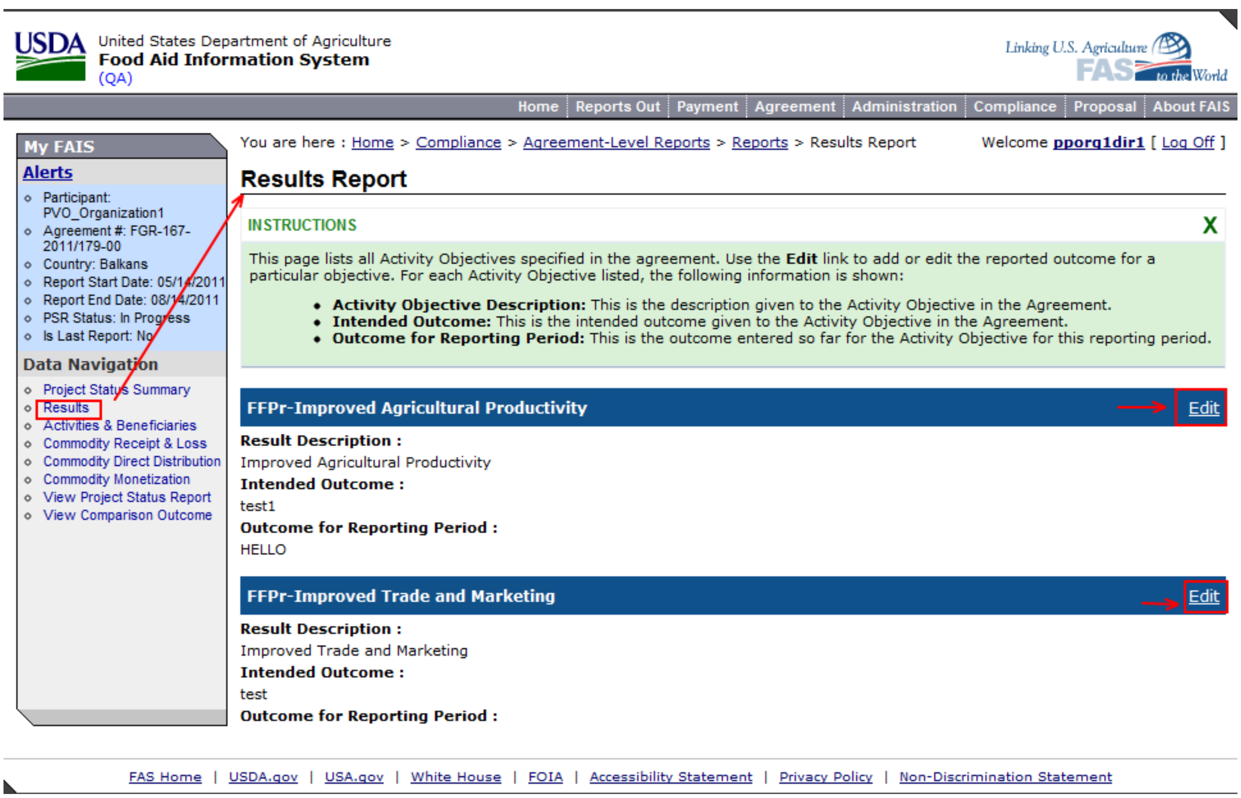
3.1.2 Results Reports

The Results Reports page lists all the Results specified in the agreement. For each Result listed, the following information is shown:

- **Result Description:** This is the description given to the Result in the Agreement.
- **Intended Outcome:** This is the intended outcome given to the Result in the Agreement.
- **Outcome for Reporting Period:** This is the outcome entered so far for the Result for this reporting period.



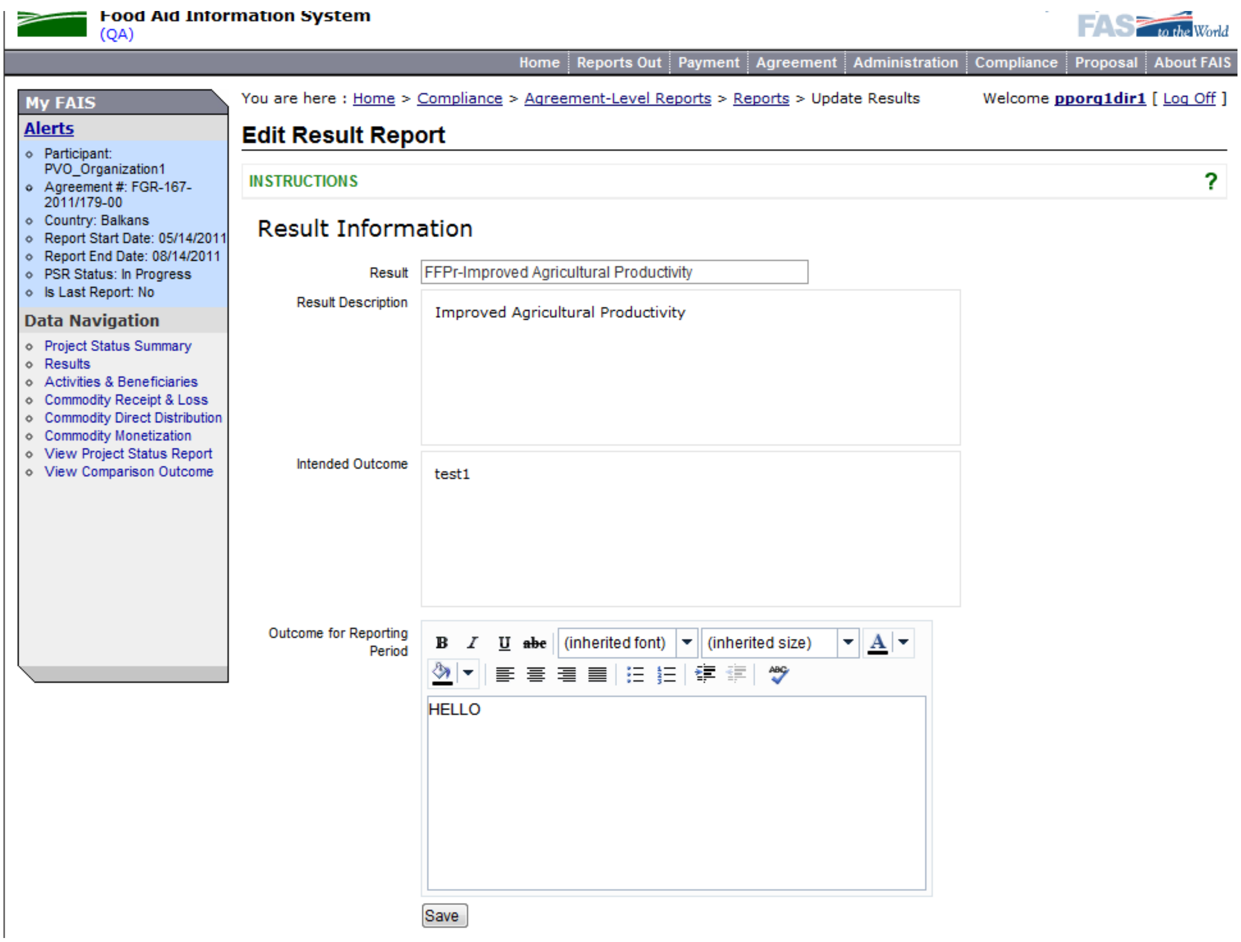
1..8.1 Adding /Editing Reports

To add or edit the Outcome for reporting period select **Edit**, the Edit Results report page opens;

1. Enter your comments in the Outcome for reporting period.

2. Select **Save** to save.

Note: The Results description and Intended Outcome data displayed on the screen are auto populated based on the data you entered during Agreement creation.

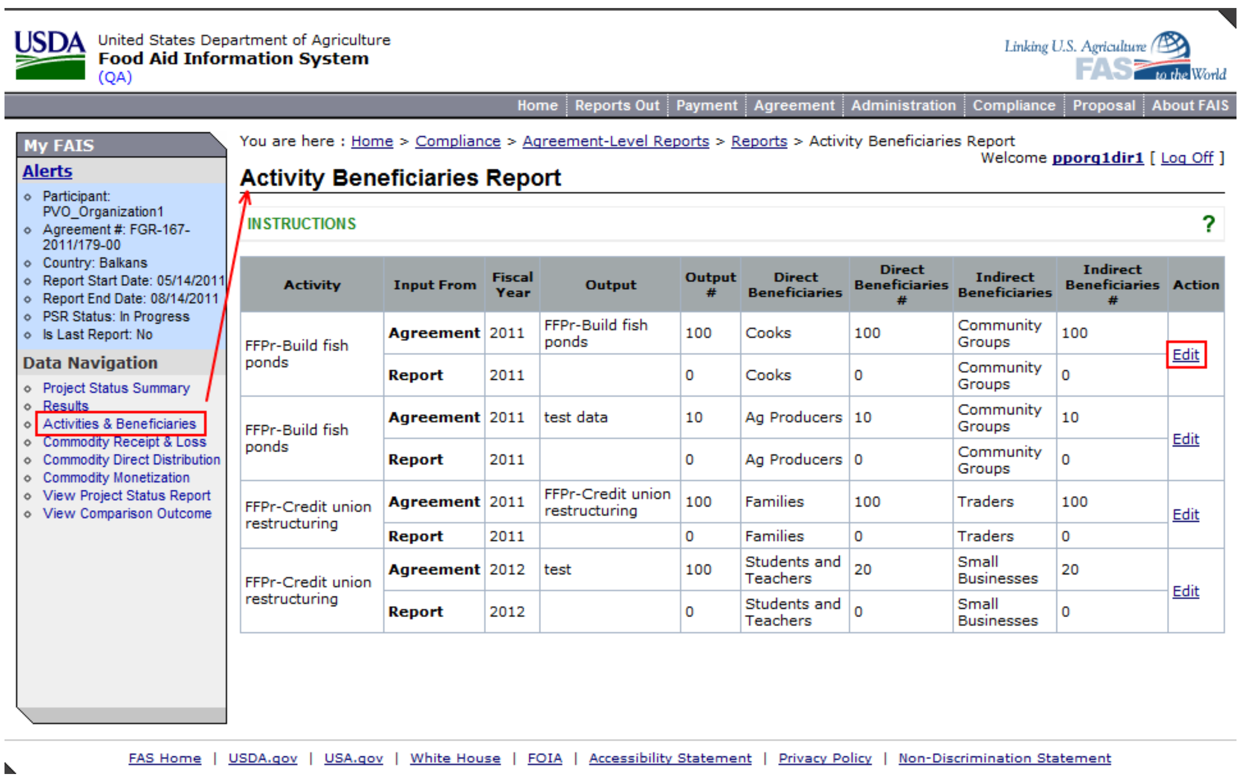


3.1.2 Activity & Beneficiaries Report

The Activity & Beneficiaries report page displays all Activities specified in the agreement. For each Activity listed, the table displays in two separate rows:

- **Agreement:** Displays basic data about the Activity *Output, Direct Beneficiaries,* and *Indirect Beneficiaries* associated with this activity for a given Fiscal Year. This data is extracted from the Agreement and cannot be edited by using the **Edit** link for this activity.

- **Report:** Displays basic data about the Activity *Output, Direct Beneficiaries,* and *Indirect Beneficiaries* associated with this activity for a given Fiscal Year. This data shows the data reported against this activity in the current report, and you can edit this data by using the **Edit** link for this activity.



3.1.2 Editing Activity Beneficiaries report

To add or edit the reported data for a particular activity select **Edit,** the Edit Activity beneficiary report page opens. You can edit the Project **Status Activity Beneficiary Report**

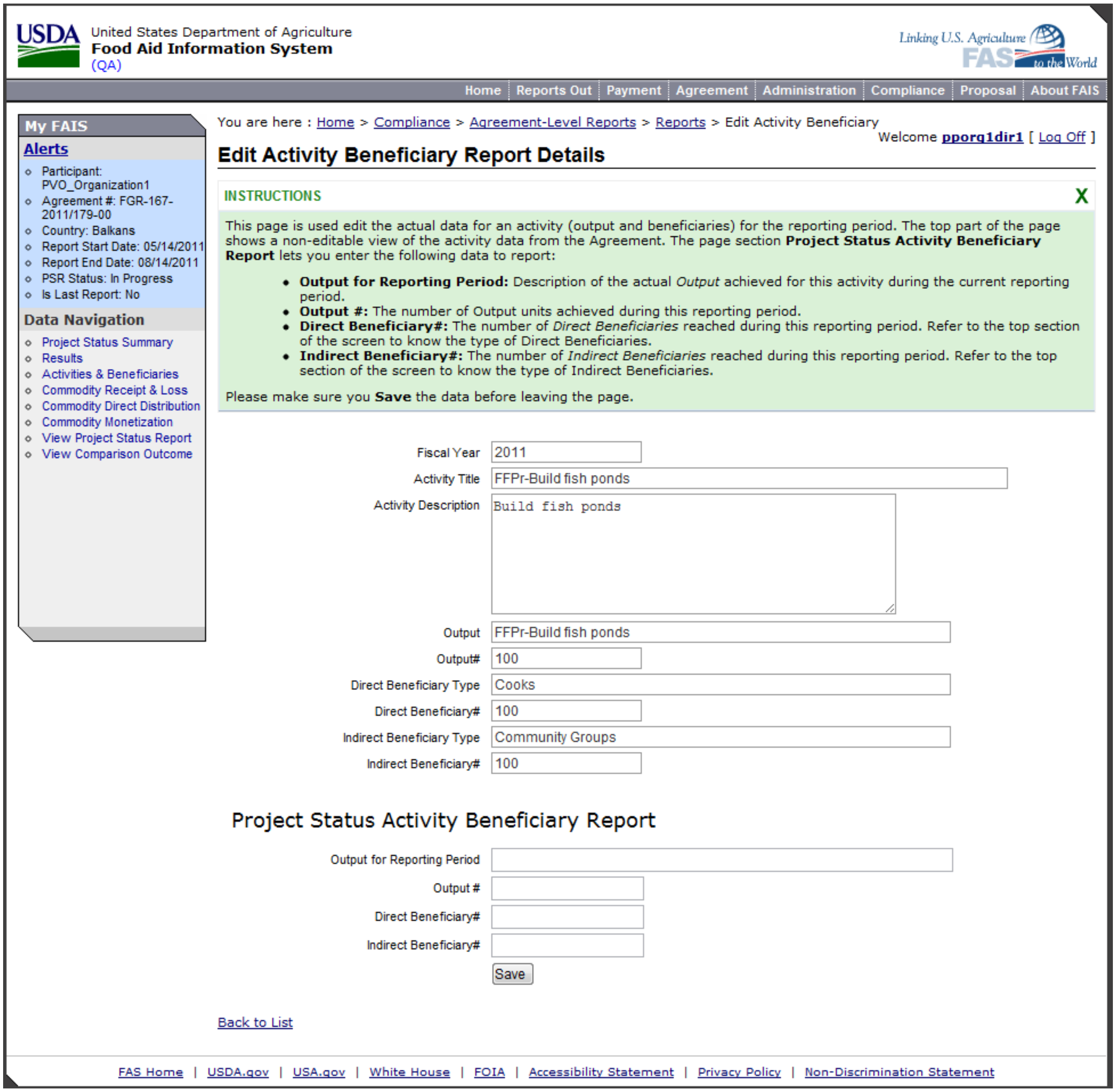
1. Enter the description of the actual Output achieved for this activity during the current reporting period in the **Output for Reporting Period field.**

2. Enter the number of Output units achieved during this reporting period in the **Output #** field

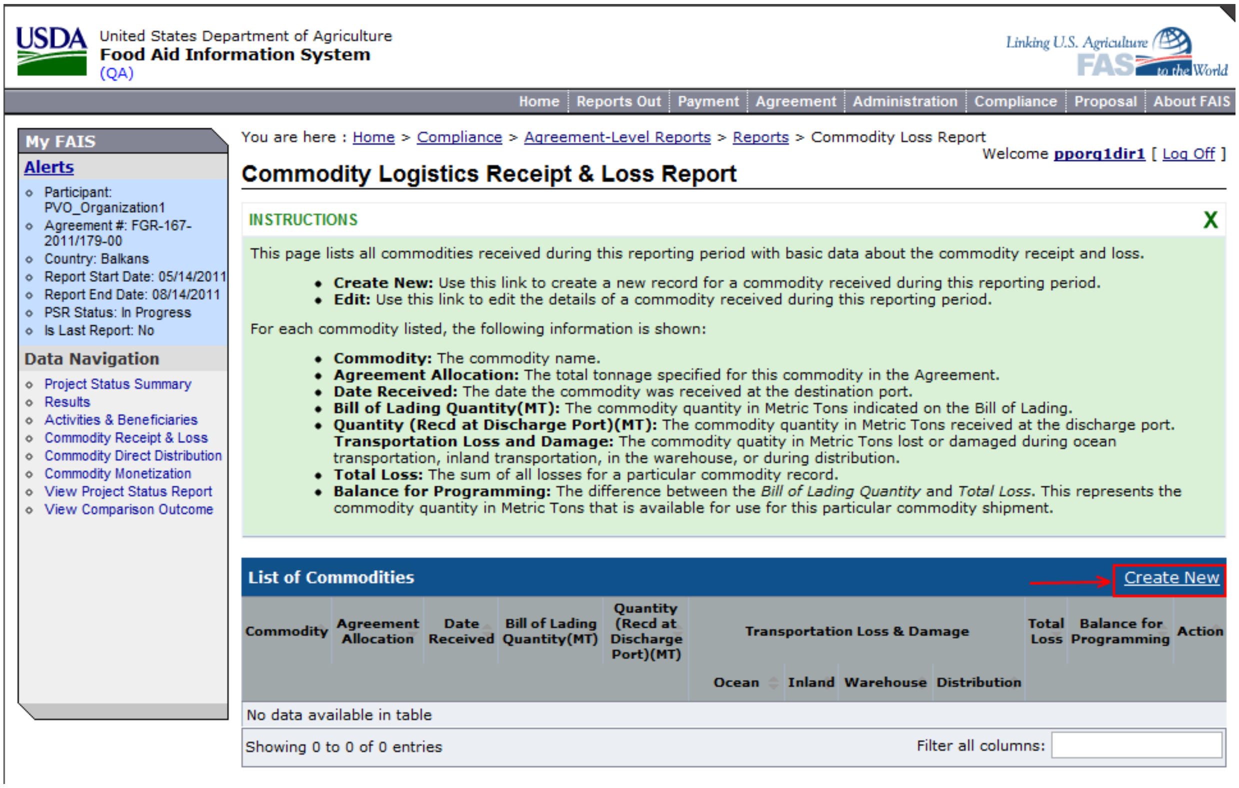
3. Enter the number of Direct Beneficiaries reached during this reporting period in the **Direct Beneficiary#**

4. Enter the number of Indirect Beneficiaries reached during this reporting period in the **Indirect Beneficiary#.**

5. Select **Save** to save the details.

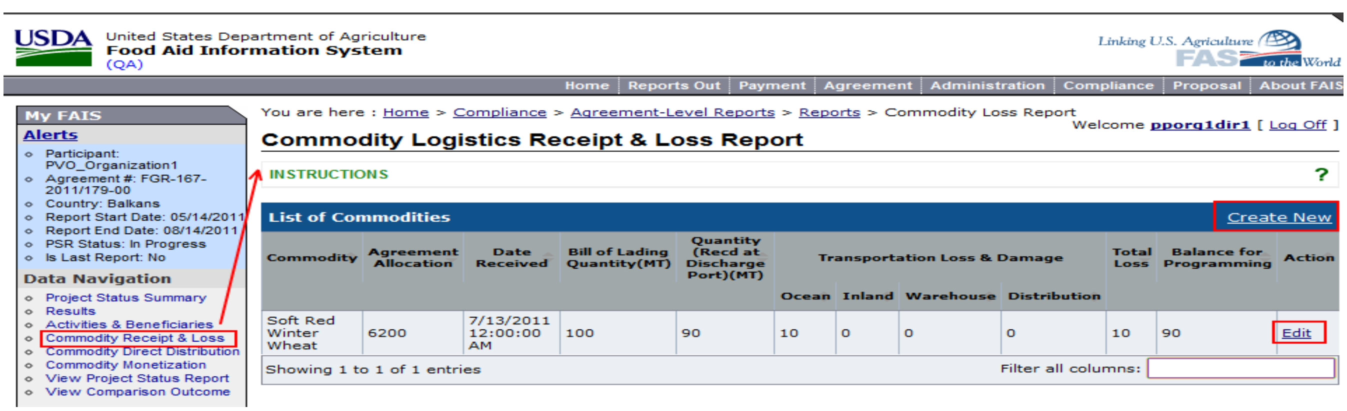


3.1.2 Commodity Logistics receipt and loss report



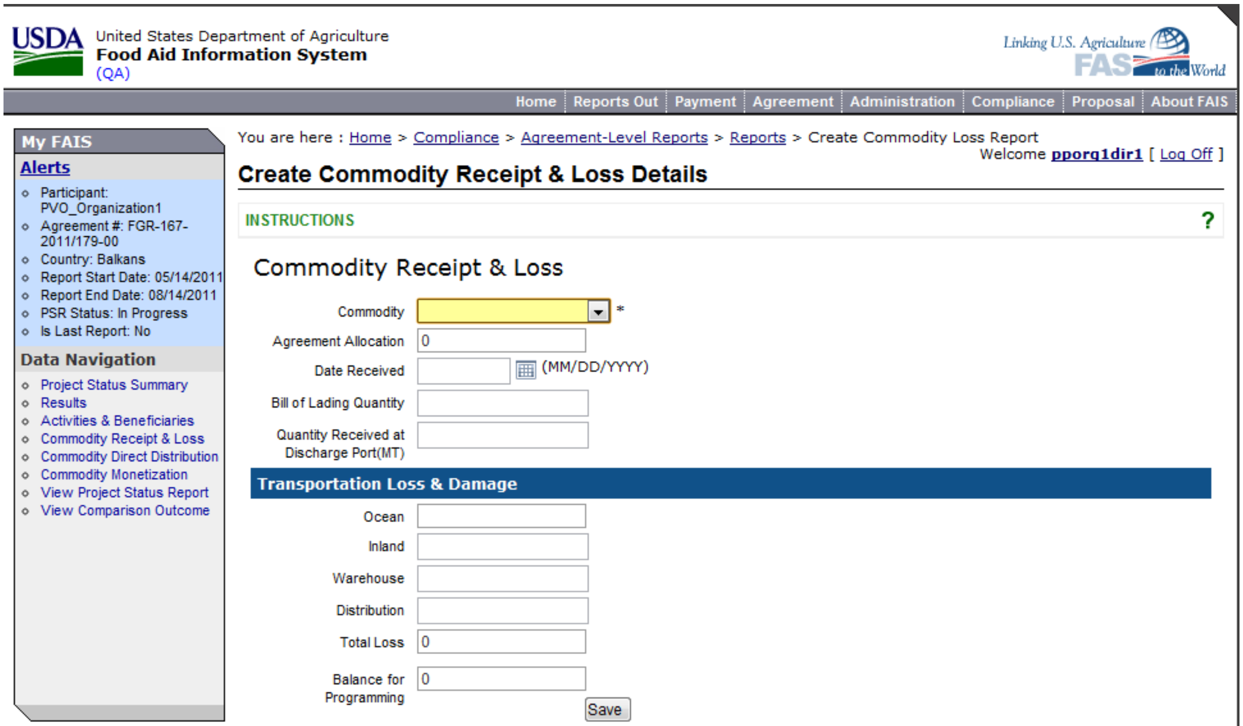
3.1.2 Commodity Receipt & Loss Details

The Commodity Receipt & Loss Details reports page lists all commodities received during this reporting period with basic data about the commodity receipt and loss. This page also allows you to create and edit a record for a commodity received during the reporting period.



3.1.2 Creating Commodity Receipt & Loss Details record

The Creating Commodity Receipt & Loss Details page is used to add a new record to the Commodity Receipt and Loss. To add a new record, select Create New in the Commodity Receipt & Loss Details reports page:



1. Select the commodity received from the drop down menu. Only the list of commodities specified in the Agreement will appear in the Commodity list.

2. Once the commodity is selected from the drop down list, the Agreement Allocation field will be populated with the commodity total quantity in Metric Tons from the Agreement.

3. Select the date received the commodity is received at the destination (discharge) port.

4. Enter the quantity in Metric Tons indicated in the Bill of Lading for this commodity in the **Bill of Lading Quantity field**.

5. Enter the commodity quantity in Metric Tons received at the discharge port in the **Quantity Received at Discharge Port(MT)** field

6. Enter the commodity quantity lost or damaged during ocean transportation in the **Ocean** field.

   Note: This field will be populated as the difference between the quantities indicated in the Bill of Lading and Quantity Received at Discharge Port.

7. Enter the commodity quantity lost or damaged during inland transportation in the **Inland** field.

8. Enter the commodity quantity lost or damaged in the warehouse in the **Warehouse** field.
9. Enter the commodity quantity lost or damaged in distribution in the **Distribution** field.
10. The loss Calculated field by adding all the loss or damage components in the **Total loss** field.
11. Balance for Programming is **c**alculated field for the commodity quantity in Metric Tons that is available for project activities. It is calculated as the difference between the Bill of Lading and Total Loss fields.
12. Select **Save** to save.

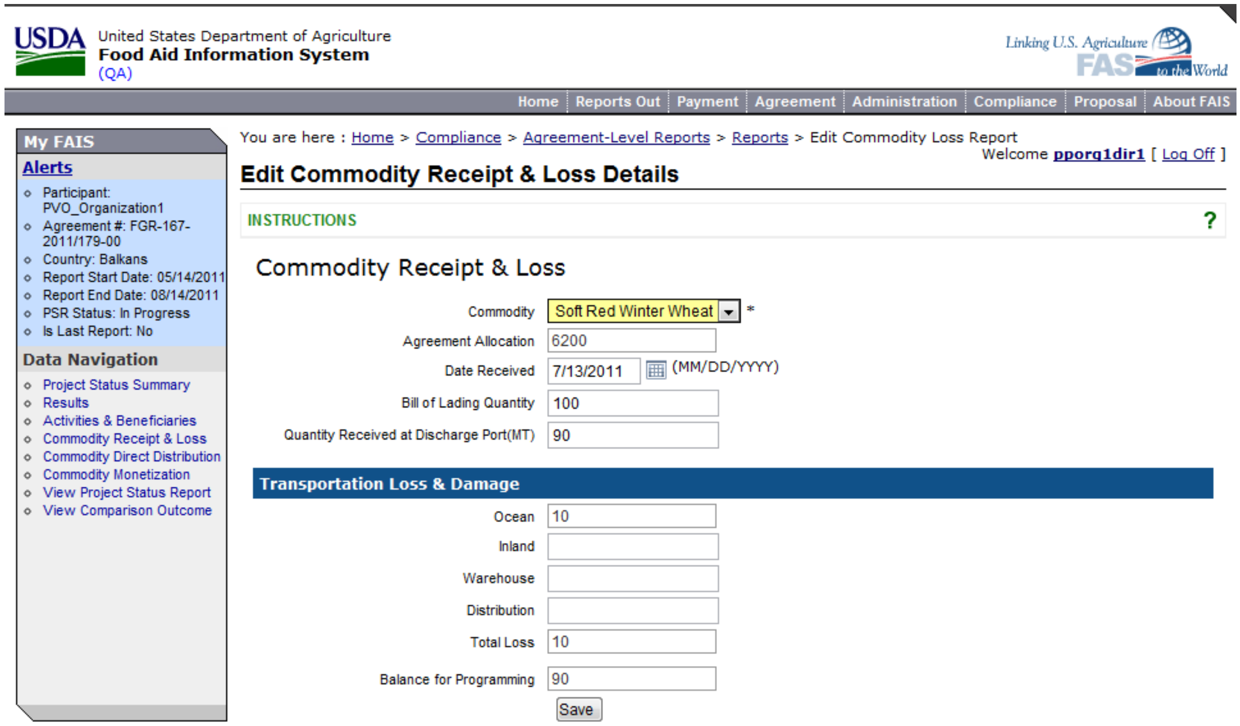
3.1.2 Editing Commodity Receipt & Loss Details record

The Editing Commodity Receipt & Loss Details page is used to edit an existing record to the Commodity Receipt and Loss. To edit a record:

1. Select the commodity received from the drop down menu. Only the list of commodities specified in the Agreement will appear in the Commodity list.
2. Once the commodity is selected from the drop down list, the Agreement Allocation field will be populated with the commodity total quantity in Metric Tons from the Agreement.
3. Select the date received the commodity is received at the destination (discharge) port.
4. Enter the quantity in Metric Tons indicated in the Bill of Lading for this commodity in the **Bill of Lading Quantity field**.
5. Enter the commodity quantity in Metric Tons received at the discharge port in the **Quantity Received at Discharge Port(MT)** field
6. Enter the commodity quantity lost or damaged during ocean transportation in the **Ocean** field.

   Note: This field will be populated as the difference between the quantities indicated in the Bill of Lading and Quantity Received at Discharge Port.
7. Enter the commodity quantity lost or damaged during inland transportation in the **Inland** field.
8. Enter the commodity quantity lost or damaged in the warehouse in the **Warehouse** field.
9. Enter the commodity quantity lost or damaged in distribution in the **Distribution** field.
10. The loss Calculated field by adding all the loss or damage components in the **Total loss** field.
11. Balance for Programming is **c**alculated field for the commodity quantity in Metric Tons that is available for project activities. It is calculated as the difference between the Bill of Lading and Total Loss fields.

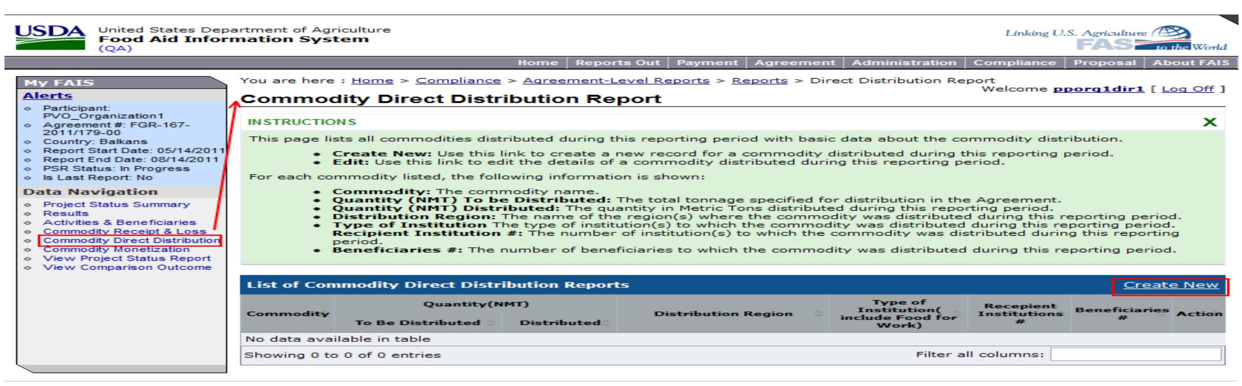
12. Select **Save** to save.



3.1.2 Commodity Direct Distribution Report

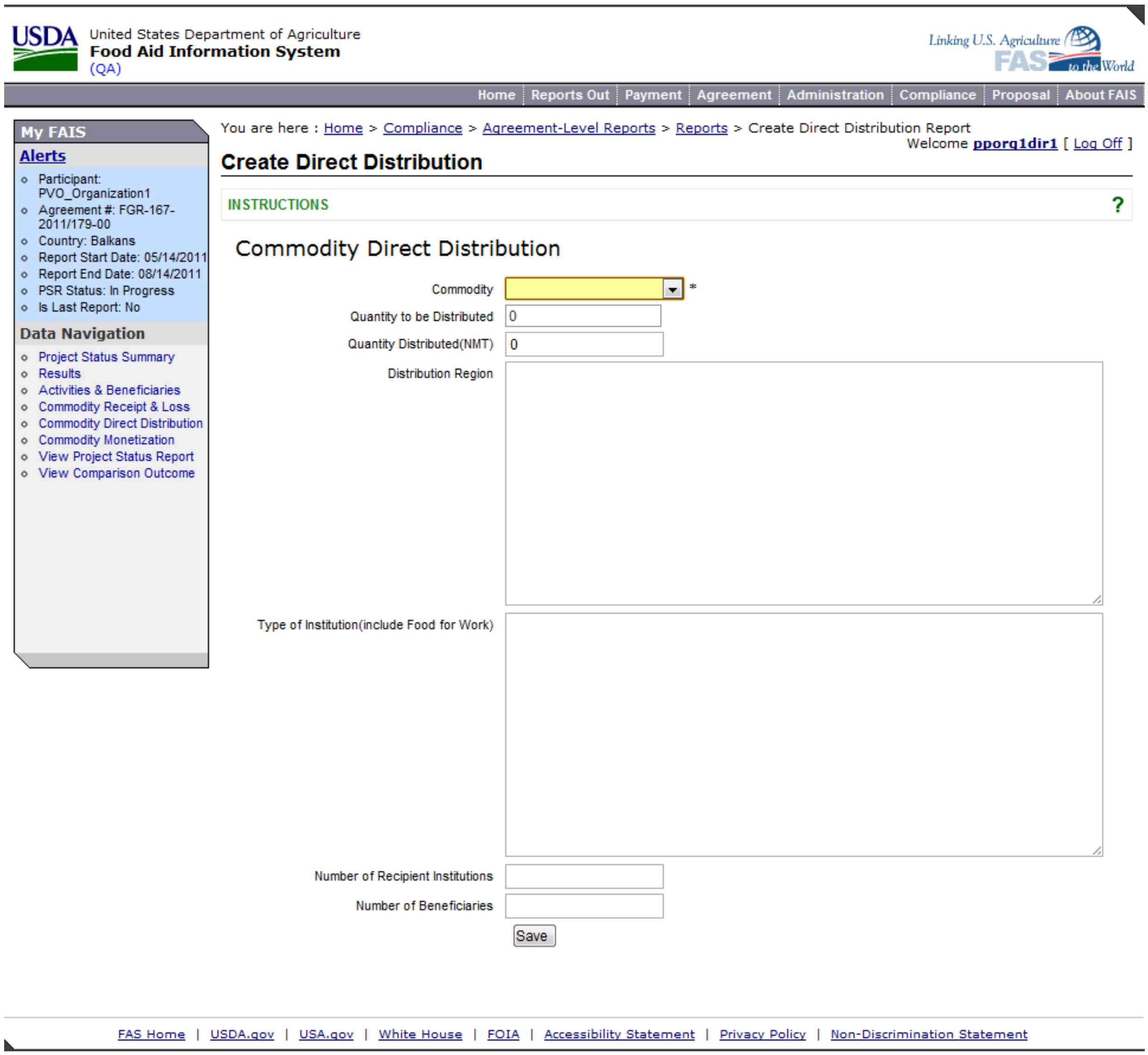
The Commodity Direct Distribution Report page lists all commodities distributed during a reporting period with basic data about the commodity distribution.

This page also allows you to create and edit a record for a commodity distributed during the reporting period.



3.1.2 Creating New Commodity Distribution Report

To create a new commodity, select Create New from the Commodity Direct Distribution Report page. The Create Direct Distribution page opens up.



To create a new record commodity distribution, enter the following details:

1. Select the commodity name from the drop down list

2. Enter the total tonnage specified for distribution in the Agreement in the **Quantity To be Distributed** field

3. Enter the quantity in Metric Tons distributed during this reporting period in the **Quantity Distributed (NMT)** field

4. Enter the name of the regions where the commodity was distributed during this reporting period in the **Distribution Region** field.

5. Enter the type of institutions to which the commodity was distributed during this reporting period in the **Type of Institution** field

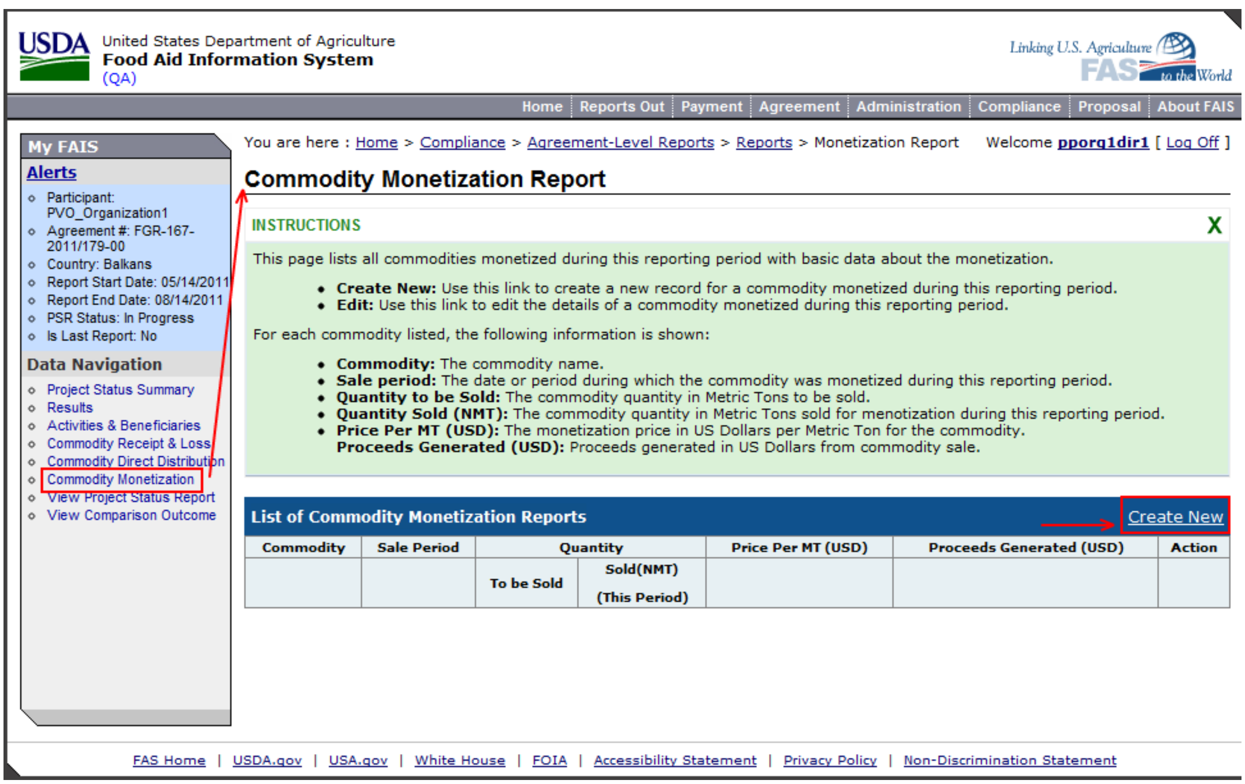
6. Enter the number of institutions to which the commodity was distributed during this reporting period in the **Number of Recipient Institution** field.

7. Enter the number of beneficiaries to which the commodity was distributed during this reporting period in the **Number of Beneficiaries** field.

3.1.2 Commodity Monetization Report

The Commodity Monetization report page lists all commodities monetized during a reporting period with basic data about the monetization.

You can also create and edit a record for a commodity monetization during the reporting period.



3.1.2 Creating a new Commodity Monetization record

The Commodity Monetization Details page is used to create a new record for a commodity monetized during a reporting. To create a new record:

1. Select the commodity name from the **Commodity** drop down list . Only the commodities specified in the Agreement will be available in the list.

2. Enter the commodity quantity in Metric Tons to be sold in the **Quantity to be Sold** field. This field is auto populated based on the data entered in the Agreement.

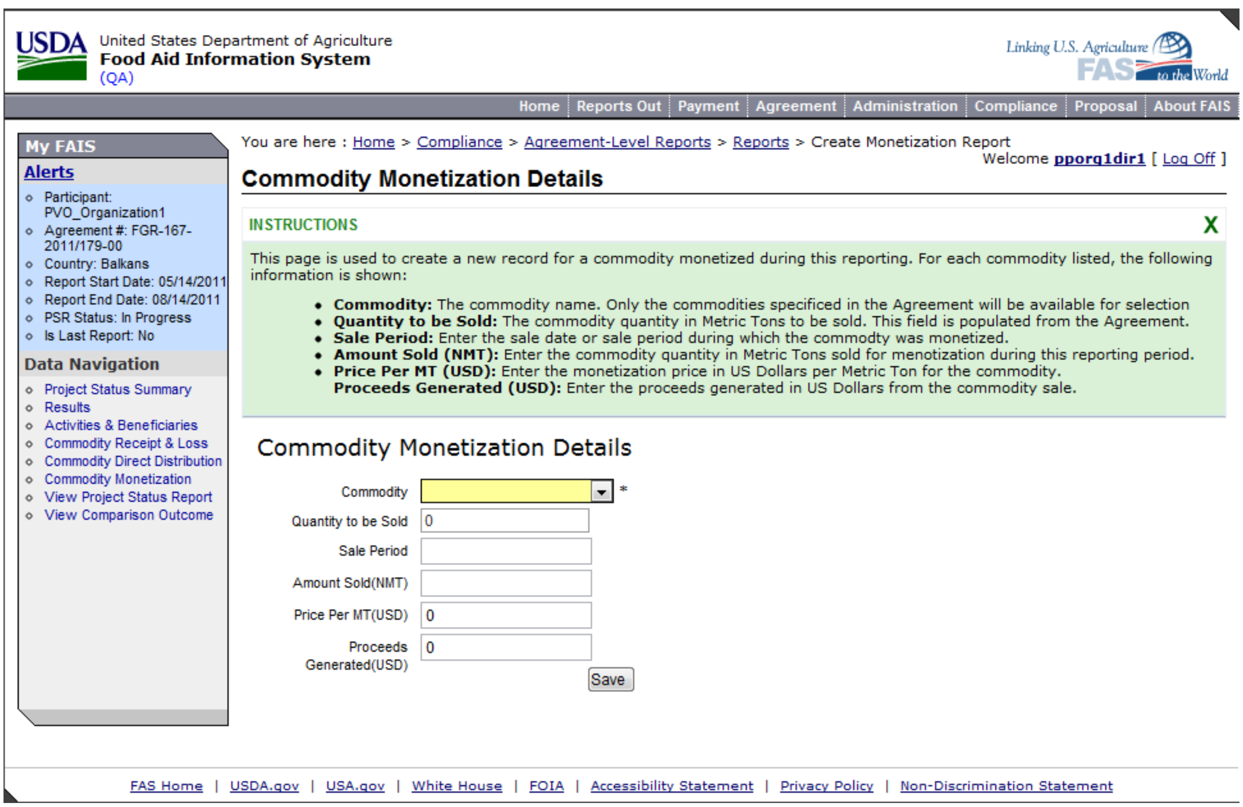
3. Enter the sale date or sale period during which the commodity was monetized in the **Sale Period** field.

4. Enter the commodity quantity in Metric Tons sold for monetization during the reporting period in the **Amount Sold (NMT)** field.

5. Enter the monetization price in US Dollars per Metric Ton for the commodity in the **Price Per MT (USD)** field.

6. Enter the proceeds generated in US Dollars from the commodity sale in the **Proceeds Generated (USD)** field.

7. Select **Save** to save the details.



3.1.2 View Project Status Report

The View Project status report page gives you a summary of all the Agreement reports mentioned below in a single page:

- Project Status Report Basic Information
- Results
- Activities & Beneficiaries
- Commodity Logistics
- Commodity Receipt Loss
- Commodity Direct Distribution
- Commodity Monetization

Compliance - View Project Status Report

Table of Content

Project Status Report Basic Details

Participant	PVO_Organization1
Agreement	FGR-167-2011/179-00
Country	Balkans
Status	In Progress
Report Period Start Date	5/14/2011
Report Period End Date	8/14/2011
Is Last Report	

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Results

FFPr-Improved Agricultural Productivity

Result Description :
Improved Agricultural Productivity
Intended Outcome :
test1
Outcome for Reporting Period :
HELLO

FFPr-Improved Trade and Marketing

Result Description :
Improved Trade and Marketing
Intended Outcome :
test
Outcome for Reporting Period :

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Activities & Beneficiaries

Activity	Input From	Fiscal Year	Output	Output #	Direct Beneficiaries	Direct Beneficiaries #	Indirect Beneficiaries	Indirect Beneficiaries #
FFPr-Build fish ponds	Agreement	2011	FFPr-Build fish ponds	100	Cooks	100	Community Groups	100
	Report	2011		0	Cooks	0	Community Groups	0
FFPr-Build fish ponds	Agreement	2011	test data	10	Ag Producers	10	Community Groups	10
	Report	2011		0	Ag Producers	0	Community Groups	0
FFPr-Credit union restructuring	Agreement	2011	FFPr-Credit union restructuring	100	Families	100	Traders	100
	Report	2011		0	Families	0	Traders	0
FFPr-Credit union restructuring	Agreement	2012	test	100	Students and Teachers	20	Small Businesses	20
	Report	2012		0	Students and Teachers	0	Small Businesses	0

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Commodity Logistics

Commodity Logistics			
Commodity	Agreement Allocation	Quantity Received	Dates Received

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Commodity Receipt Loss

Commodity Receipt Loss										
Commodity	Agreement Allocation	Date Received	Bill of Lading Quantity(MT)	Quantity (Recd at Discharge Port) (MT)	Transportation Loss & Damage				Total	Balance for Programming
					Ocean	Inland	Warehouse	Distribution		

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Commodity Direct Distribution

Commodity Direct Distribution						
Commodity	Quantity		Distribution Region	Type of Institution(include Food for Work)	Recepient Institutions #	Beneficiaries #
	To Be Distributed (NMT)	Distributed (NMT)				

Top ^

Commodity Monetization

Commodity Monetization					
Commodity	Sale Period	Quantity		Price Per MT (USD)	Proceeds Generated (USD)
		To be Sold	Sold(NMT) (This Period)		

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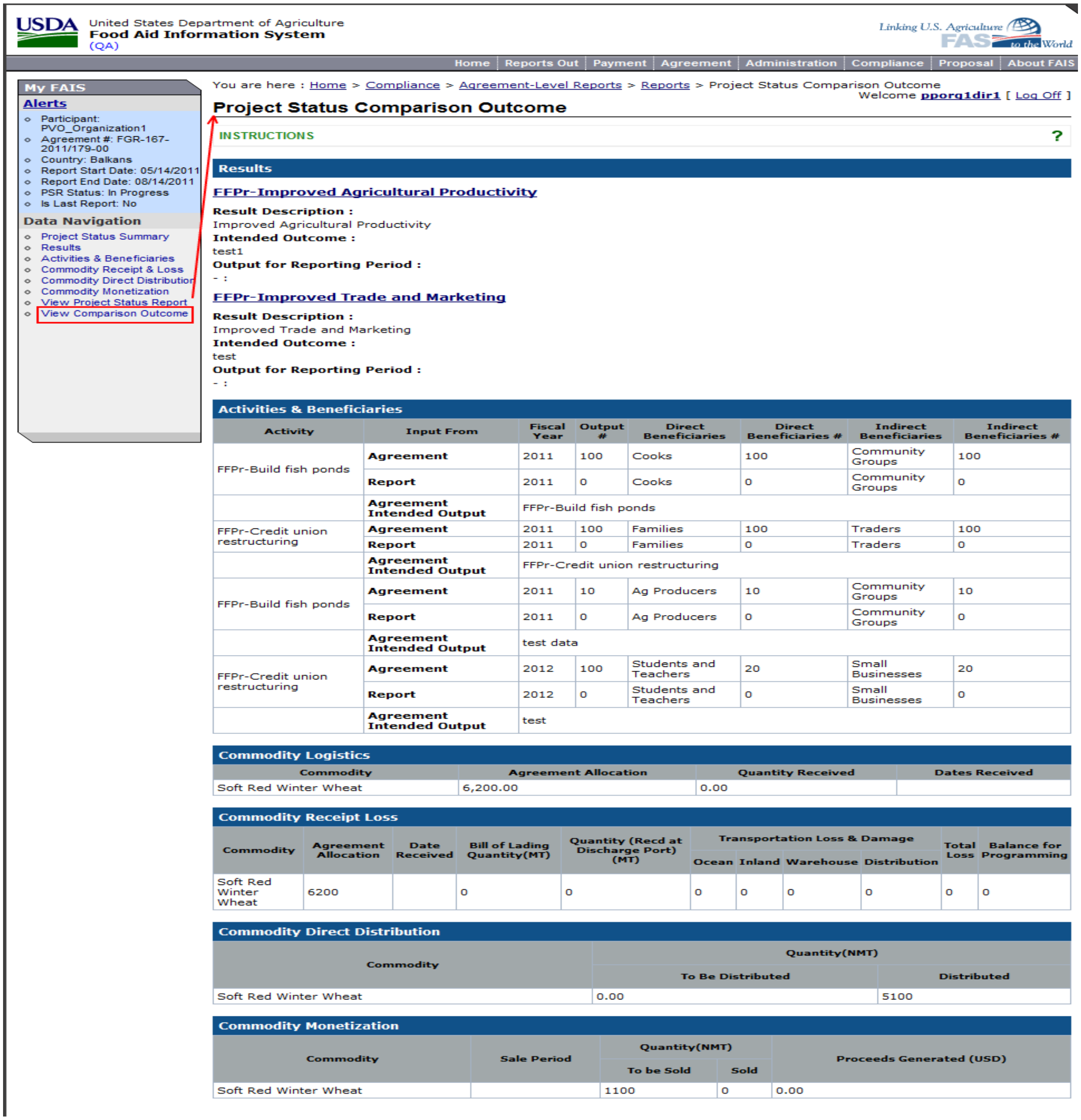
3.1.2 Project Status Comparison Outcome

The Project Status Comparison Outcome page shows a view of all the Agreement status line items compared with the corresponding item for all **Submitted** reports. For items that are numeric (for example, the quantity sold of a given commodity), the comparison will show the cumulative sum of the item compared with that approved in the Agreement. For items that are text-based (for example, the outcome of a Result), the comparison will show the text reported and that in the approved Agreement.



USDA United States Department of Agriculture
Food Aid Information System
(QA)

Linking U.S. Agriculture FAS to the World

Home | Reports Out | Payment | Agreement | Administration | Compliance | Proposal | About FAIS

My FAIS

Alerts

- Participant: PVO_Organization1
- Agreement #: FGR-167-2011/179-00
- Country: Balkans
- Report Start Date: 05/14/2011
- Report End Date: 08/14/2011
- PSR Status: In Progress
- Is Last Report: No

Data Navigation

- Project Status Summary
- Results
- Activities & Beneficiaries
- Commodity Receipt & Loss
- Commodity Direct Distribution
- Commodity Monetization
- View Project Status Report
- View Comparison Outcome

You are here : Home > Compliance > Agreement-Level Reports > Reports > Project Status Comparison Outcome

Welcome pporg1dir1 [Log Off]

Project Status Comparison Outcome

INSTRUCTIONS ?

Results

FFPr-Improved Agricultural Productivity

Result Description :
Improved Agricultural Productivity
Intended Outcome :
test1
Output for Reporting Period :
- :

FFPr-Improved Trade and Marketing

Result Description :
Improved Trade and Marketing
Intended Outcome :
test
Output for Reporting Period :
- :

Activities & Beneficiaries

Activity	Input From	Fiscal Year	Output #	Direct Beneficiaries	Direct Beneficiaries #	Indirect Beneficiaries	Indirect Beneficiaries #
FFPr-Build fish ponds	**Agreement**	2011	100	Cooks	100	Community Groups	100
	Report	2011	0	Cooks	0	Community Groups	0
	Agreement Intended Output	FFPr-Build fish ponds					
FFPr-Credit union restructuring	**Agreement**	2011	100	Families	100	Traders	100
	Report	2011	0	Families	0	Traders	0
	Agreement Intended Output	FFPr-Credit union restructuring					
FFPr-Build fish ponds	**Agreement**	2011	10	Ag Producers	10	Community Groups	10
	Report	2011	0	Ag Producers	0	Community Groups	0
	Agreement Intended Output	test data					
FFPr-Credit union restructuring	**Agreement**	2012	100	Students and Teachers	20	Small Businesses	20
	Report	2012	0	Students and Teachers	0	Small Businesses	0
	Agreement Intended Output	test					

Commodity Logistics

Commodity	Agreement Allocation	Quantity Received	Dates Received
Soft Red Winter Wheat	6,200.00	0.00	

Commodity Receipt Loss

Commodity	Agreement Allocation	Date Received	Bill of Lading Quantity(MT)	Quantity (Recd at Discharge Port) (MT)	Transportation Loss & Damage				Total Loss	Balance for Programming
					Ocean	Inland	Warehouse	Distribution		
Soft Red Winter Wheat	6200		0	0	0	0	0	0	0	0

Commodity Direct Distribution

Commodity	Quantity(NMT)	
	To Be Distributed	Distributed
Soft Red Winter Wheat	0.00	5100

Commodity Monetization

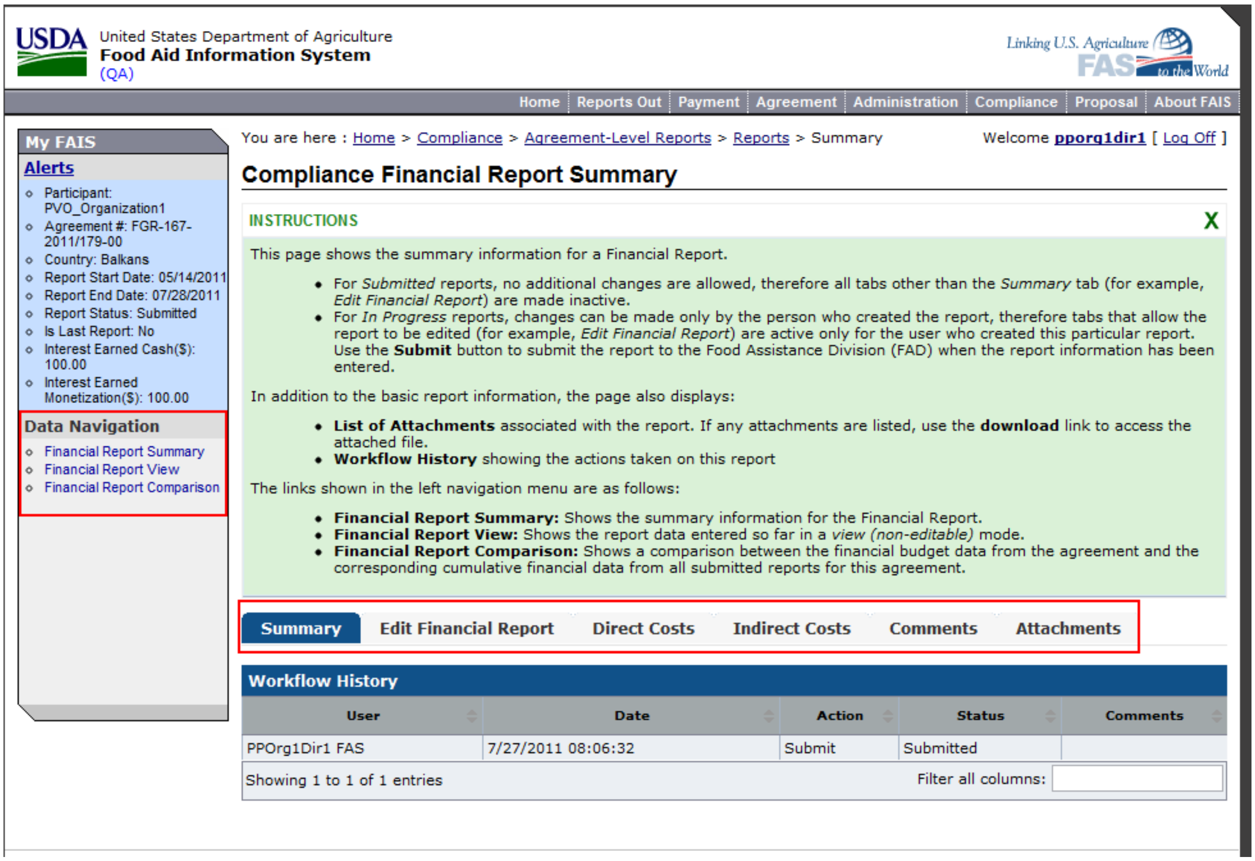
Commodity	Sale Period	Quantity(NMT)		Proceeds Generated (USD)
		To be Sold	Sold	
Soft Red Winter Wheat		1100	0	0.00

3.1.2 Compliance Financial Report

The Compliance Financial Report Summary page shows the summary of a financial status report.

The page also displays a **List of Attachments** associated with the report. To access the attachments select the **download** link to access the attached file. A Workflow History table displays the actions taken on this report.

If the report is already submitted, you will only be able to view the summary page. If the report is "In Progress" status, you can edit the status report.



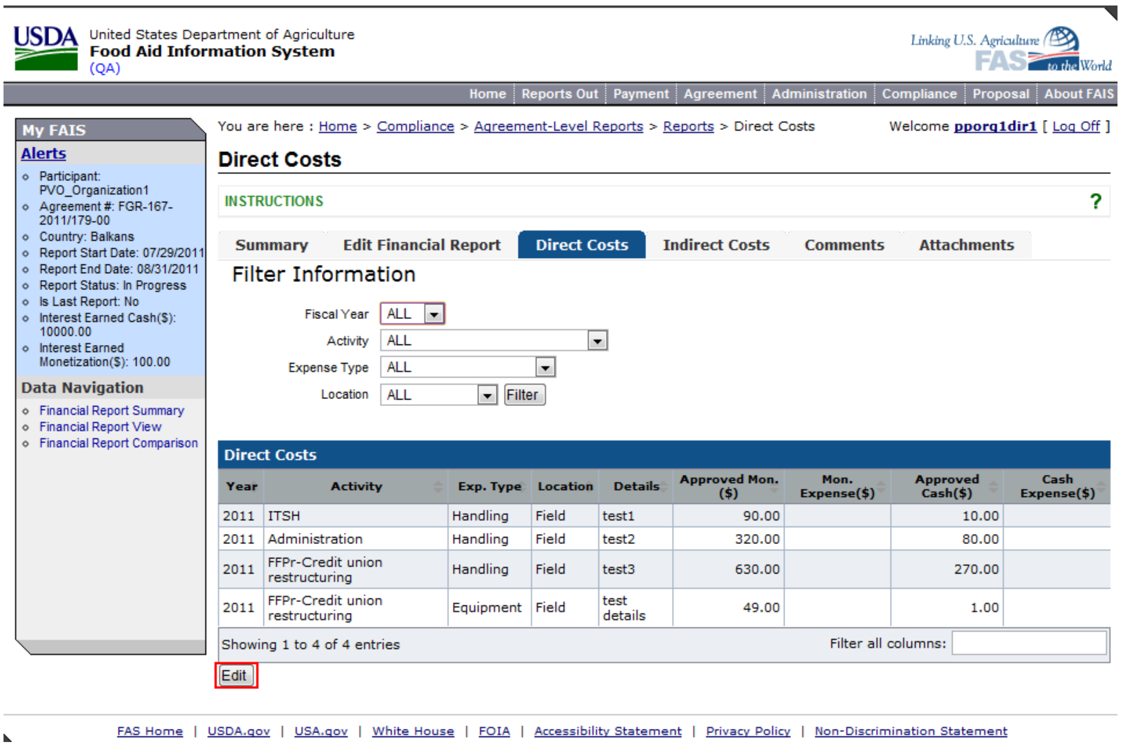
From this page you can navigate to the following from the left navigation menu:

- **Financial Report Summary:** Shows the summary information for the Financial Report.
- **Financial Report View:** Shows the report data entered so far in a *view (non-editable)* mode.
- **Financial Report Comparison:** Shows a comparison between the financial budget data from the agreement and the corresponding cumulative financial data from all submitted reports for this agreement.

1..21.1 Direct Costs

The Direct Costs tab is used to enter the actual **Direct Cost** expenditures during the report period. The page contains the following sections:

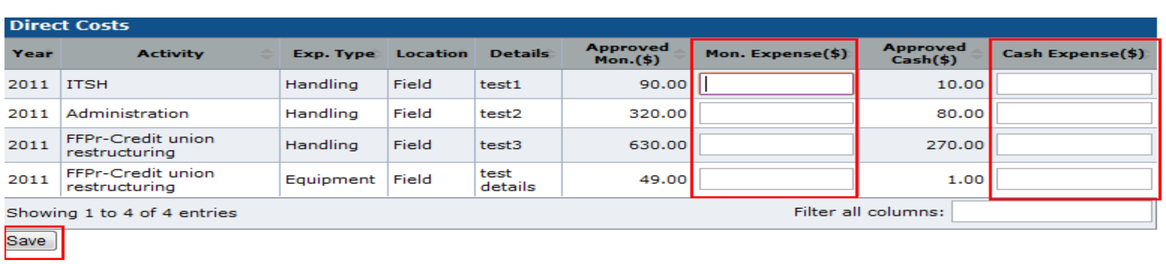
Direct Costs table shows the budget line items that satisfy the Filter Information search criteria. If direct costs have already been entered in the report, the entered data will appear in the two columns: Mon. Expenses($) (Monetization Expenses) and Cash Expenses($).



1..21.2 Editing Direct Costs

To Edit direct costs, select **Edit**, the columns Mon. Expenses($) and Cash Expenses($) column becomes editable that allows you to enter the amount.

Select **Save** to save the direct costs.


Direct Costs

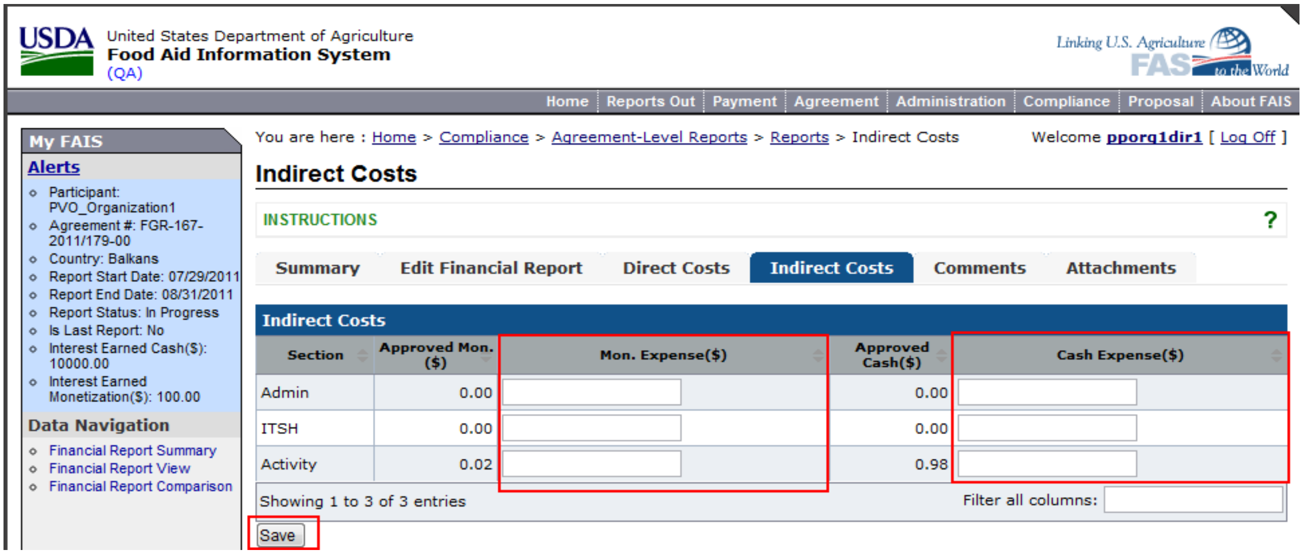
Year	Activity	Exp. Type	Location	Details	Approved Mon.($)	Mon. Expense($)	Approved Cash($)	Cash Expense($)
2011	ITSH	Handling	Field	test1	90.00		10.00	
2011	Administration	Handling	Field	test2	320.00		80.00	
2011	FFPr-Credit union restructuring	Handling	Field	test3	630.00		270.00	
2011	FFPr-Credit union restructuring	Equipment	Field	test details	49.00		1.00	

Showing 1 to 4 of 4 entries Filter all columns:

Save

1..21.3 Indirect Costs

The Indirect Costs tab can be used to enter the actual Indirect Cost expenditures during the report period. Select **Save** after entering the values in the table.



1..21.4 Entering Comments

This tab is used by FAD and the Program participant to comment or communicate information pertaining to the status report.

1..21.5 Viewing and Adding Comments

View PP and FAD Comments section allows you to view the comments entered by the Program Participant and the FAD user. The userid and timestamp reflects for every comment added.

To add a comment:

1. Enter the comment in the FAD Comments or the PP Comments section depending the user .
2. Select Save to save the comment.

Note: The userid and the timestamp are added to the comment while saving.

1..21.6 Adding Attachments

This tab allows you to attach a report associated with the agreement.

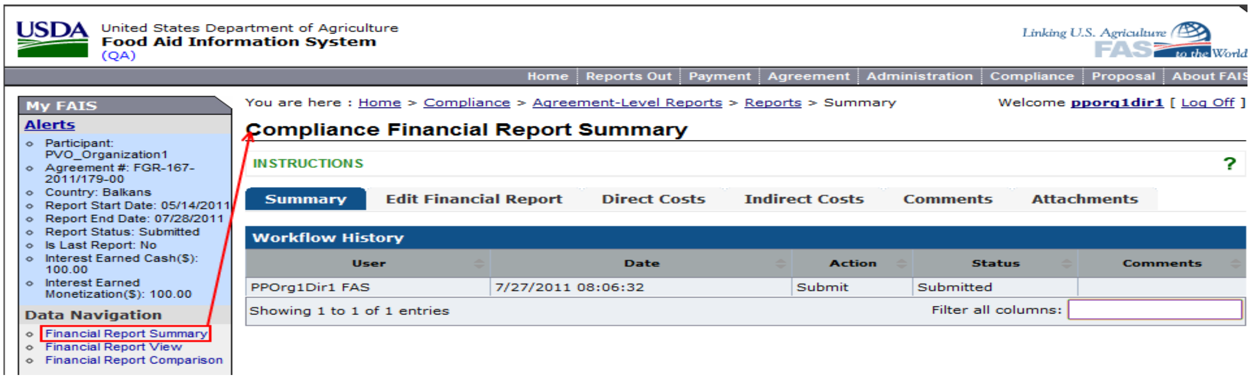
To upload an attachment:

1. Select the file type from the drop down list.
2. Select **Choose File** to browse your local computer and select the file you want to upload.

Select **Upload** to upload the file

3.1.2 Compliance Financial Report Summary

The Compliance financial report Summary page displays the summary information for the Financial Report.



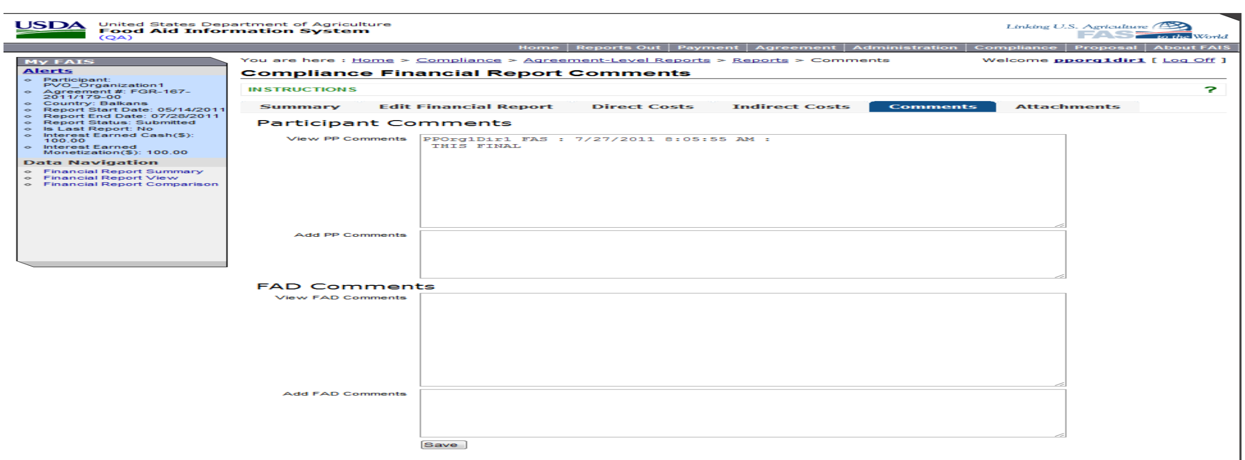
1..22.1 Viewing and Adding Comments

View PP and FAD Comments section allows you to view the comments entered by the Program Participant and the FAD user. The userid and timestamp reflects for every comment added.

To add a comment:

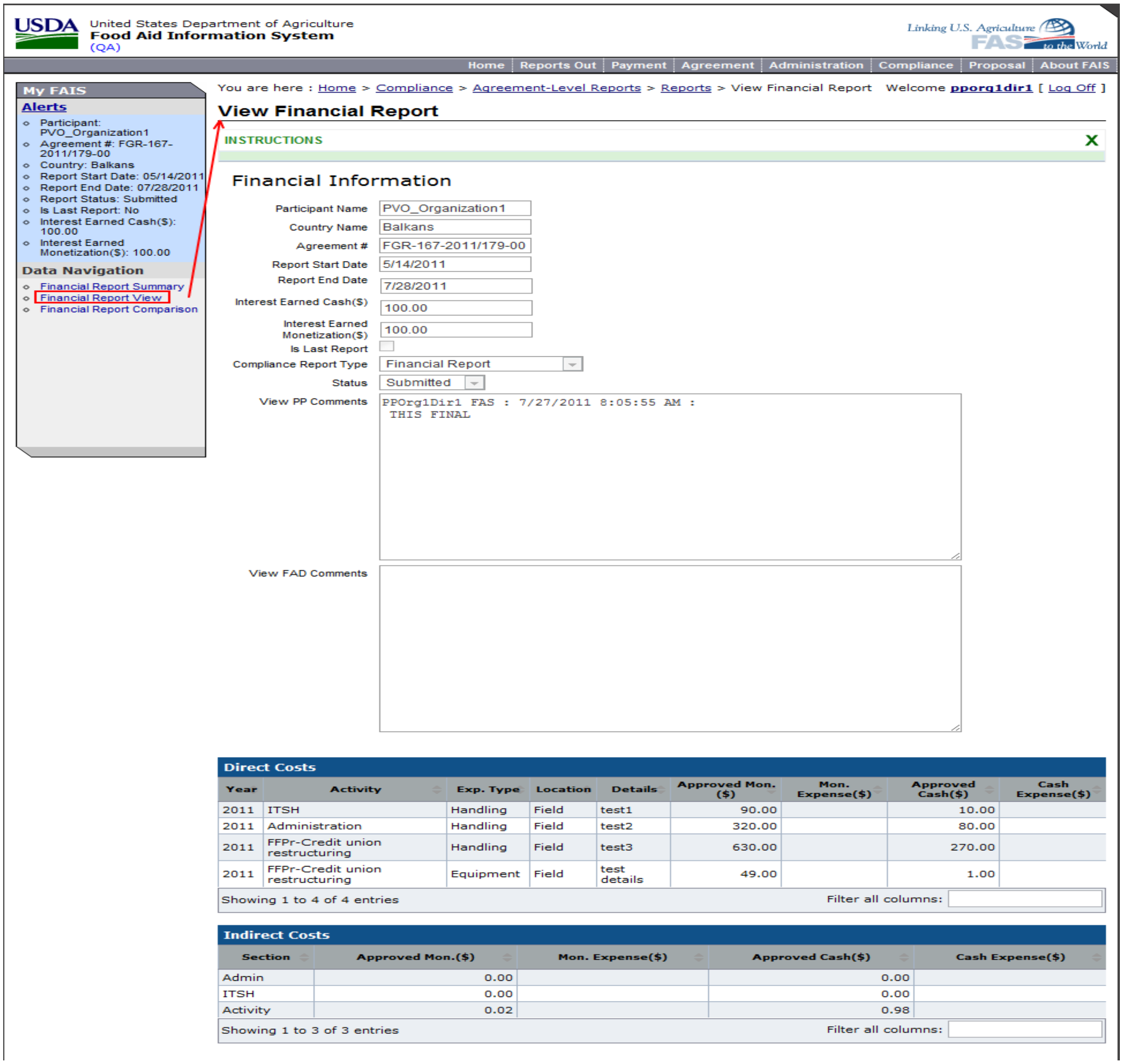
1. Enter the comment in the FAD Comments or the PP Comments section depending the user.
2. Select Save to save the comment.

Note: The userid and the timestamp are added to the comment while saving.



3.1.2 Viewing Financial Report

The View Financial Report page shows the report data entered so far in a view only mode.

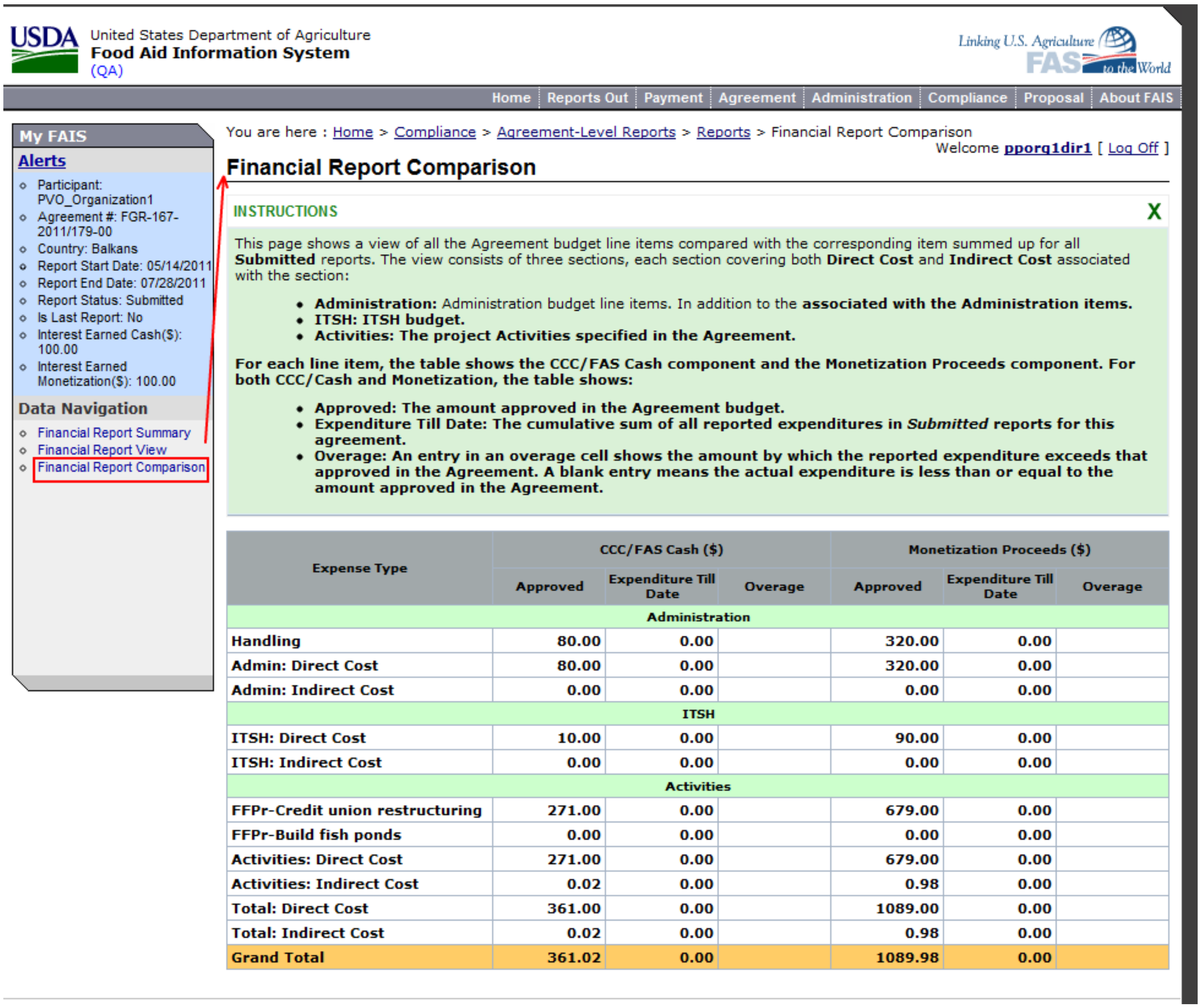


3.1.2 Financial Report Comparison

The Financial Report Comparison page displays a view of all the Agreement budget line items compared with the corresponding item summed up for all Submitted reports. The view consists of three sections, each section covering both Direct Cost and Indirect Cost associated with the section:

- **Administration:** Administration budget line items. In addition to the associated with the Administration items.
- **ITSH:** ITSH budget.
- **Activities:** The project Activities specified in the Agreement.

For each line item, the table shows the CCC/FAS Cash component and the Monetization Proceeds component.


USDA United States Department of Agriculture
Food Aid Information System
(QA)

Linking U.S. Agriculture FAS to the World

Home | Reports Out | Payment | Agreement | Administration | Compliance | Proposal | About FAIS

My FAIS

Alerts

- Participant: PVO_Organization1
- Agreement #: FGR-167-2011/179-00
- Country: Balkans
- Report Start Date: 05/14/2011
- Report End Date: 07/28/2011
- Report Status: Submitted
- Is Last Report: No
- Interest Earned Cash($): 100.00
- Interest Earned Monetization($): 100.00

Data Navigation

- Financial Report Summary
- Financial Report View
- Financial Report Comparison

You are here : Home > Compliance > Agreement-Level Reports > Reports > Financial Report Comparison

Welcome pporg1dir1 [Log Off]

Financial Report Comparison

INSTRUCTIONS X

This page shows a view of all the Agreement budget line items compared with the corresponding item summed up for all **Submitted** reports. The view consists of three sections, each section covering both **Direct Cost** and **Indirect Cost** associated with the section:

- **Administration:** Administration budget line items. In addition to the **associated with the Administration items.**
- **ITSH: ITSH budget.**
- **Activities: The project Activities specified in the Agreement.**

For each line item, the table shows the CCC/FAS Cash component and the Monetization Proceeds component. For both CCC/Cash and Monetization, the table shows:

- **Approved: The amount approved in the Agreement budget.**
- **Expenditure Till Date: The cumulative sum of all reported expenditures in *Submitted* reports for this agreement.**
- **Overage: An entry in an overage cell shows the amount by which the reported expenditure exceeds that approved in the Agreement. A blank entry means the actual expenditure is less than or equal to the amount approved in the Agreement.**

Expense Type	CCC/FAS Cash ($)			Monetization Proceeds ($)		
	Approved	Expenditure Till Date	Overage	Approved	Expenditure Till Date	Overage
Administration						
Handling	80.00	0.00		320.00	0.00	
Admin: Direct Cost	80.00	0.00		320.00	0.00	
Admin: Indirect Cost	0.00	0.00		0.00	0.00	
ITSH						
ITSH: Direct Cost	10.00	0.00		90.00	0.00	
ITSH: Indirect Cost	0.00	0.00		0.00	0.00	
Activities						
FFPr-Credit union restructuring	271.00	0.00		679.00	0.00	
FFPr-Build fish ponds	0.00	0.00		0.00	0.00	
Activities: Direct Cost	271.00	0.00		679.00	0.00	
Activities: Indirect Cost	0.02	0.00		0.98	0.00	
Total: Direct Cost	361.00	0.00		1089.00	0.00	
Total: Indirect Cost	0.02	0.00		0.98	0.00	
Grand Total	361.02	0.00		1089.98	0.00	

2 Program Participant Level reports

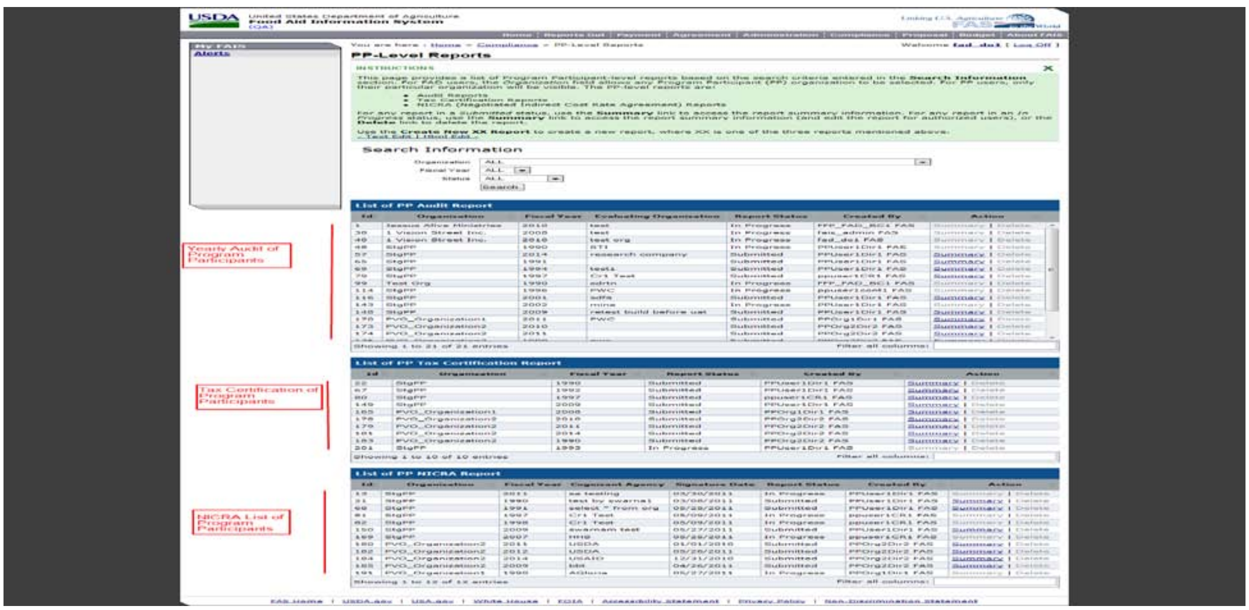
The PP-Level report page provides a list of Program Participant-level reports based on the search criteria entered in the **Search Information** section.

The PP Level reports varies based on the user type. If the user is a FAD user, the Organization field allows any Program Participant (PP) organization to be selected. If the user is a PP user, only their organization will be visible. The PP-level reports are:

- Audit Reports
- Tax Certification Reports
- NICRA (Negotiated Indirect Cost Rate Agreement) Reports

Select the **Summary** link to access the report summary information in the Submitted status. Select the **Summary** link to access the report summary information in the "In Progress" status, or select the **Delete** link to delete the report.

FAD users can view, edit and unsubmit based on the reports they select. Some reports cannot bed edited by a FAD user but can unsubmit them.



3.1.2 Creating New PP Audit Report

To create a new PP Audit report, select Create New PP Audit Report; the Create PP Audit report page opens.

To create a new PP audit report you need to do the following

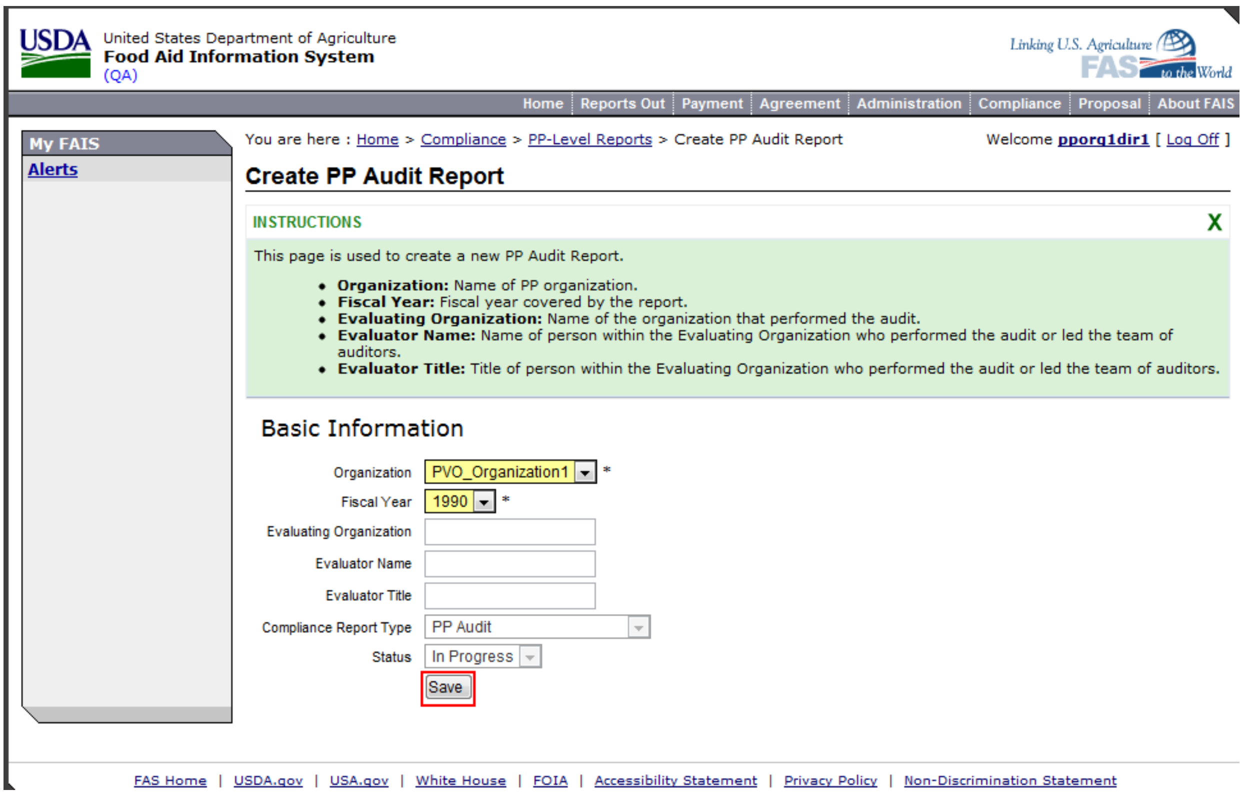
1. Select the name of PP organization from the drop down list
2. Select the fiscal year covered by the report from the drop down list.
3. Enter the name of the organization that performed the audit in the **Evaluating Organization** field.

4. Enter the name of person within the Evaluating Organization who performed the audit or led the team of auditors in the **Evaluator Name** field

5. Enter the title of person within the Evaluating Organization who performed the audit or led the team of auditors in the **Evaluator Title** field.

6. Select **Save** to save.

Note: The fields in yellow are mandatory.



3.1.2 Viewing PP Report

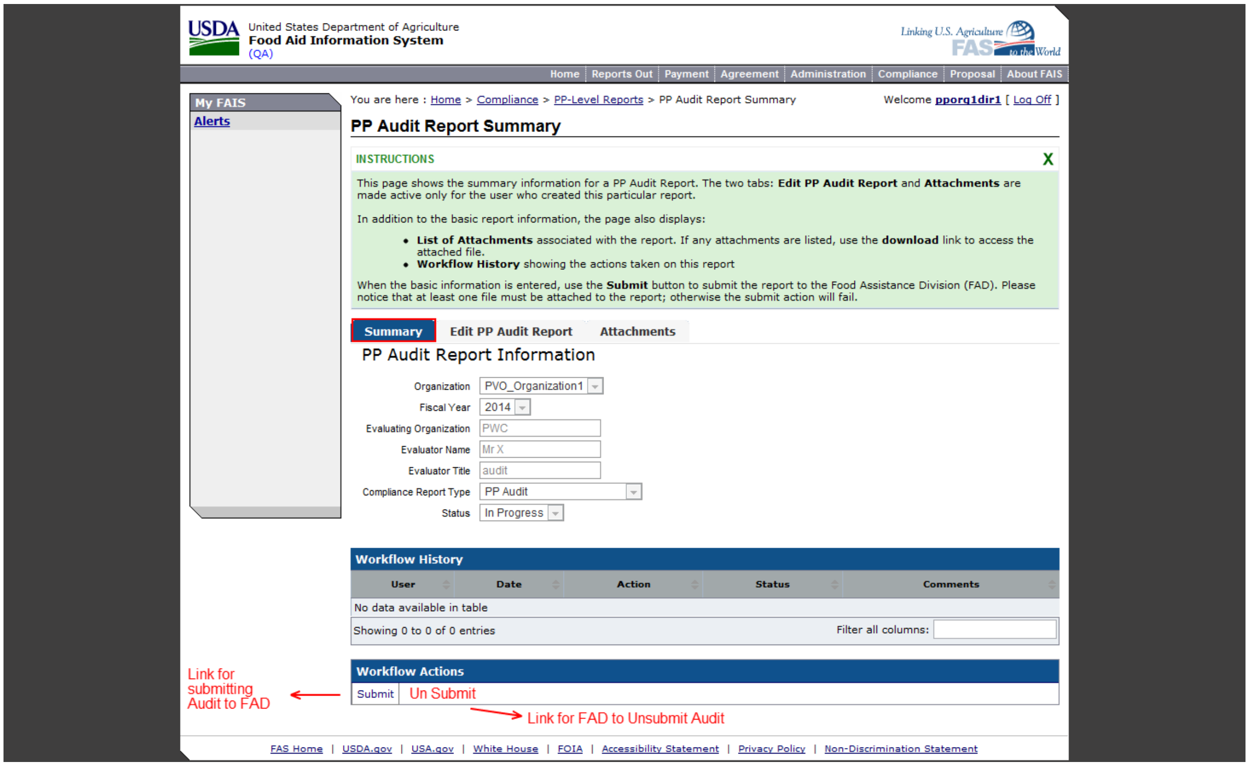
FAD user can view the PP Audit report summary by selecting Summary on the PP-Level Report page, the Program Participant Audit Summary page opens.

The FAD user can only view the summary page details but cannot edit it. However the FAD user can unsubmit the report.

The summary also shows the following:

- **List of Attachments** associated with the report. If any attachments are listed, use the **download** link to access the attached file.

- **Workflow History** showing the actions taken on this report



3.1.2 Editing PP Report

The PP report can be edited by selecting the **Edit PP Audit Report** tab

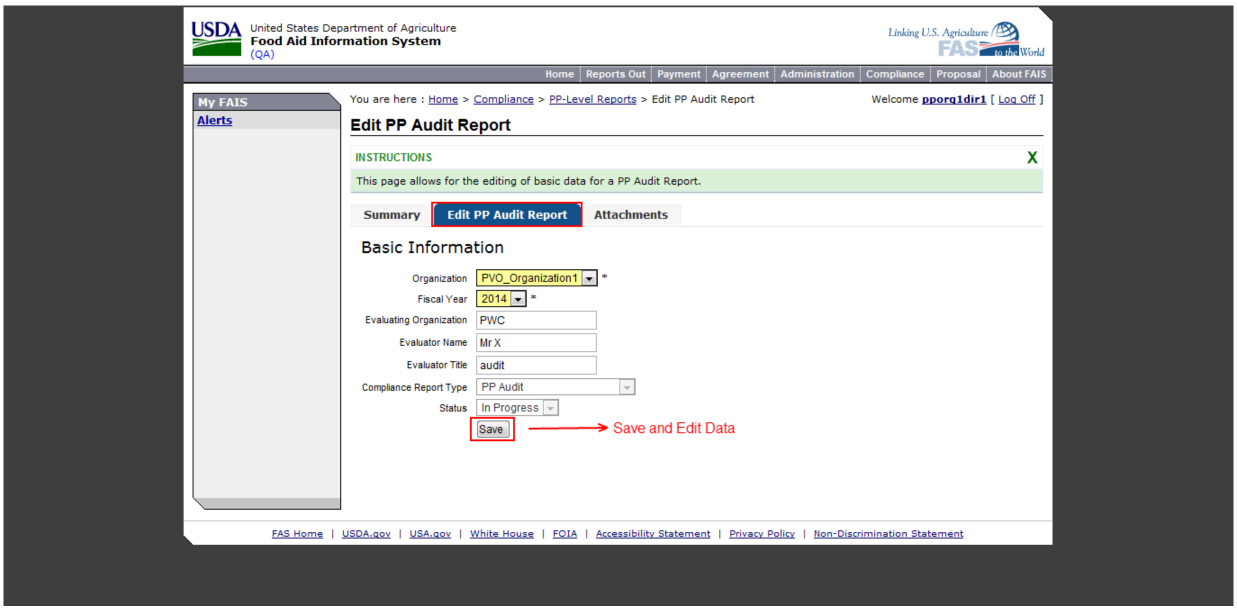
A PP user can only edit a PP Audit report.

To edit a new PP audit report you need to do the following

1. Select the name of PP organization from the drop down list
2. Select the fiscal year covered by the report from the drop down list.
3. Enter the name of the organization that performed the audit in the **Evaluating Organization** field.
4. Enter the name of person within the Evaluating Organization who performed the audit or led the team of auditors in the **Evaluator Name** field

5. Enter the title of person within the Evaluating Organization who performed the audit or led the team of auditors in the **Evaluator Title** field.

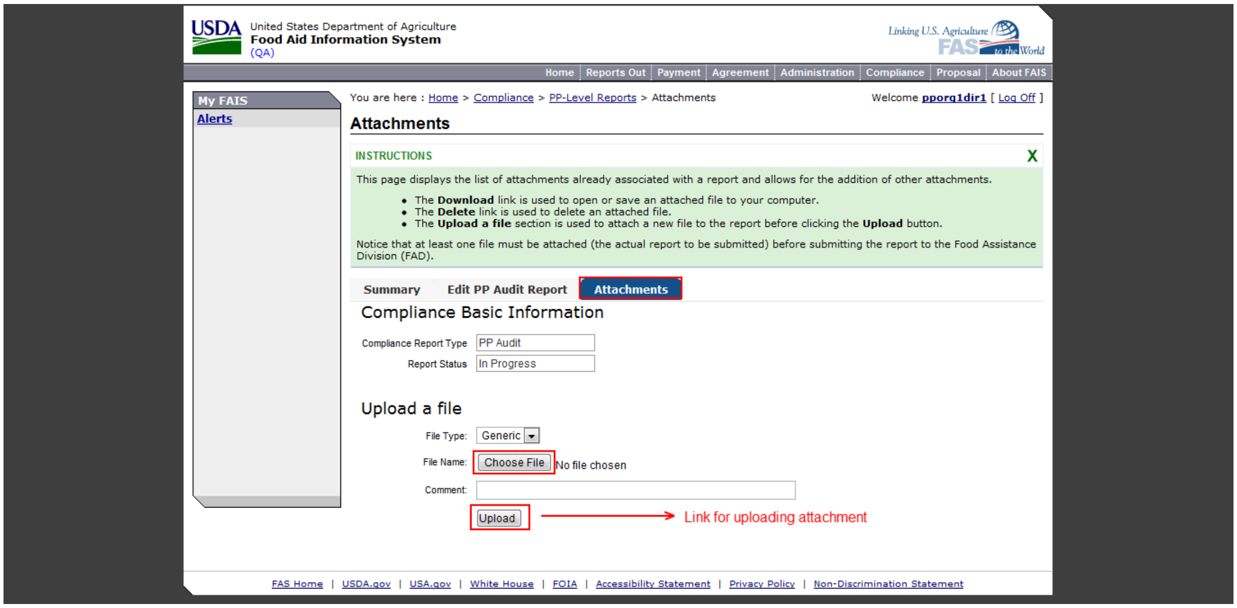
6. Select **Save** to save.



3.1.2 PP Audit Attachment

A user can attach supporting documents by selecting the Attachments tab. To upload a file:

1. Select a File Type from the drop down list
2. Select the file type by selecting Choose File, browse your local computer and select the file you want to upload.
3. Enter comments in the **Comment** field
4. Select **Upload** to upload the documents.

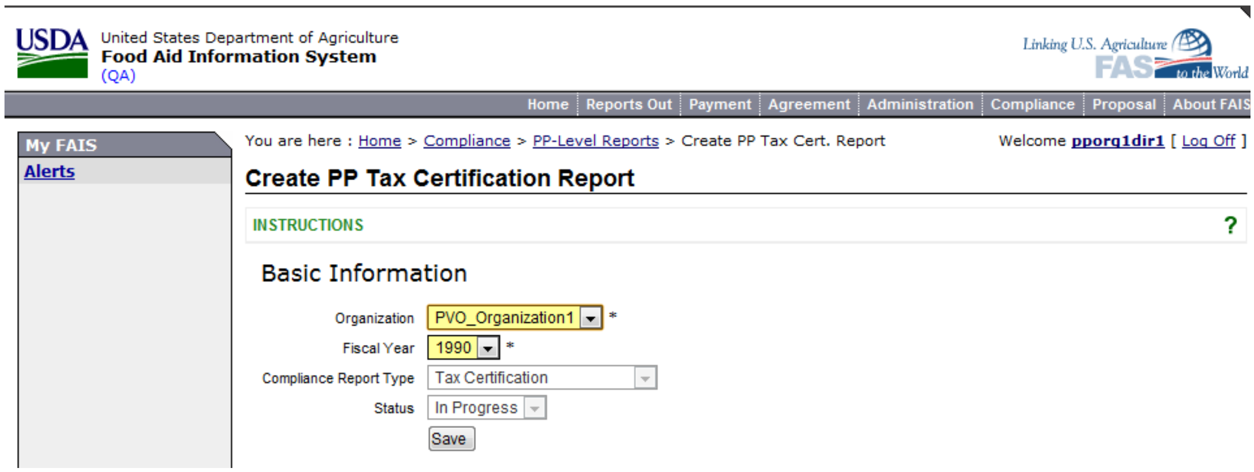


3.1.2 Creating New PP Tax Certification Report

To create new PP Tax certification report, select Create New PP Tax Certification Report from the List of New PP Tax Certification Report, the Create New PP Tax Certification Report page opens.

To create a new PP Tax Certification Report, enter the basic information as described below:

1. Select the name of the organization from the drop down list
2. Select the fiscal year from the drop down list.
3. Select the Compliance Report type from the droop down list
4. Select the status from the drop down list
5. Select **Save** to save.



3.1.3

3.1.2 Viewing PP Tax Certification Report

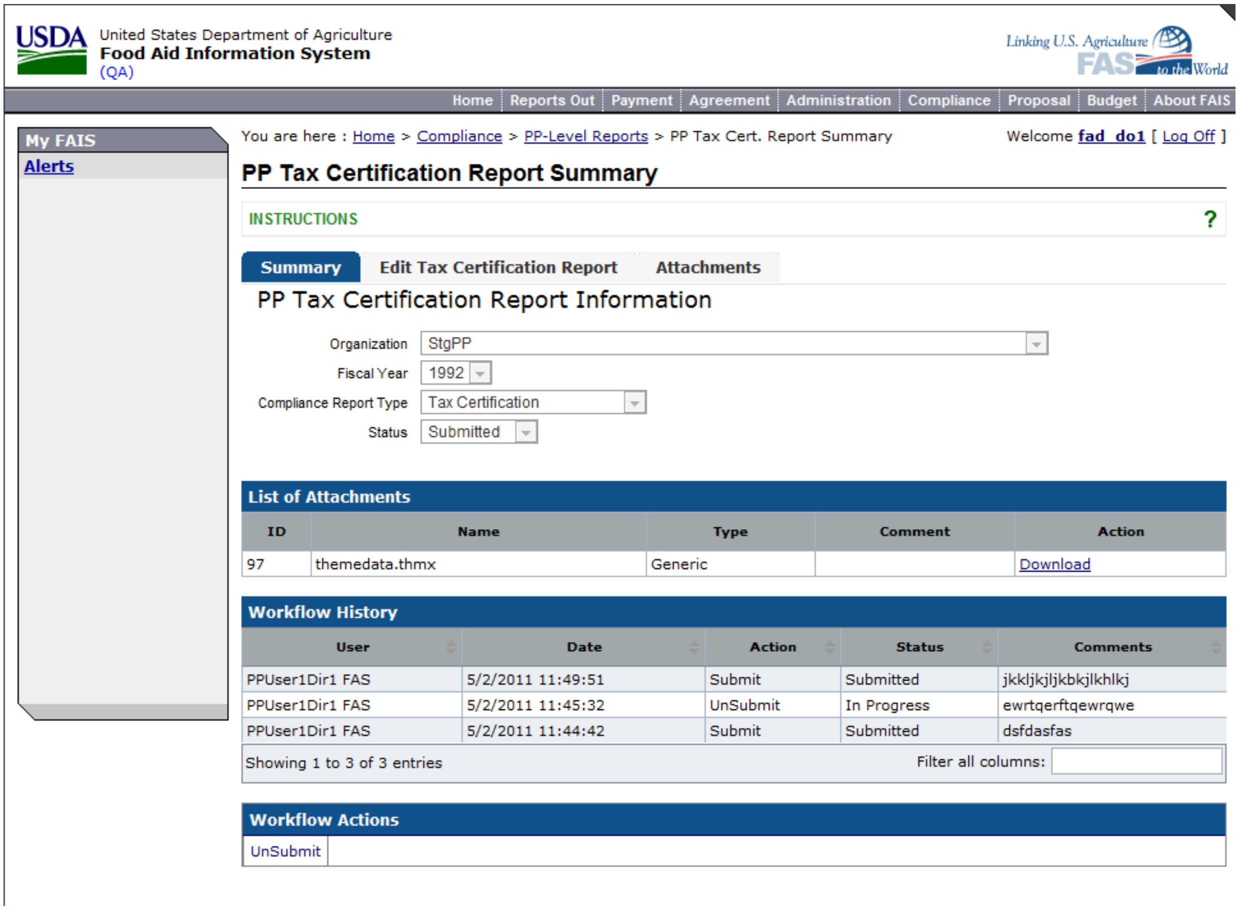
To view a Tax Certification Report, select **Summary** from the PP-Level Report page. The PP Tax Certification page opens displaying the summary information.

FAD user can view the PP Audit report summary by selecting Summary on the PP-Level Report page, the Program Participant Audit Summary page opens.

The FAD user can only view the summary page details but cannot edit it. However the FAD user can unsubmit the report.

The summary also shows the following:

- **List of Attachments** associated with the report. If any attachments are listed, use the **download** link to access the attached file.
- **Workflow History** showing the actions taken on this report



3.1.2 Editing PP Tax Certification Report

To edit a new PP Tax Certification Report, enter the basic information as described below:

1. Select the name of the organization from the drop down list
2. Select the fiscal year from the drop down list.
3. Select the Compliance Report type from the droop down list
4. Select the status from the drop down list
5. Select **Save** to save.

3.1.2 Attaching Supporting documents

A user can attach supporting documents by selecting the Attachments tab. To upload a file:

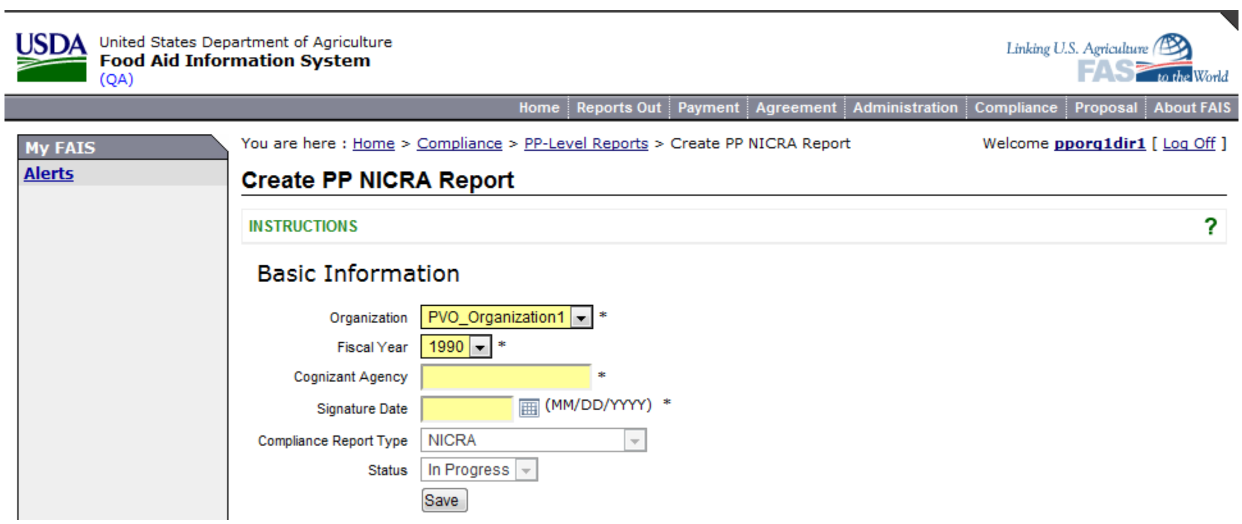
1. Select a File Type from the drop down list
2. Select the file type by selecting Choose File, browse your local computer and select the file you want to upload.
3. Enter comments in the **Comment** field
4. Select **Upload** to upload the documents.

3.1.2 Creating New PP NICRA report

To create PP NICRA report, select Create New PP NICRA report from the list of PP NICRA report, the Create New PP NICRA report page opens.

To create a new PP NICRA report, enter the following details as described below:

1. Select the name of the organization from the drop down list
2. Select the fiscal year from the drop down list.
3. Enter the name of the cognizant agency in the **Cognizant Agency** field.
4. Select the Compliance Report type from the droop down list
5. Select the signature date.
6. Select the status from the drop down list
7. Select **Save** to save.



3.1.2 Viewing PP NICRA Report

To view a Tax Certification Report, select **Summary** from the PP-NICRA Report page. The PP NICRA page opens displaying the summary information.

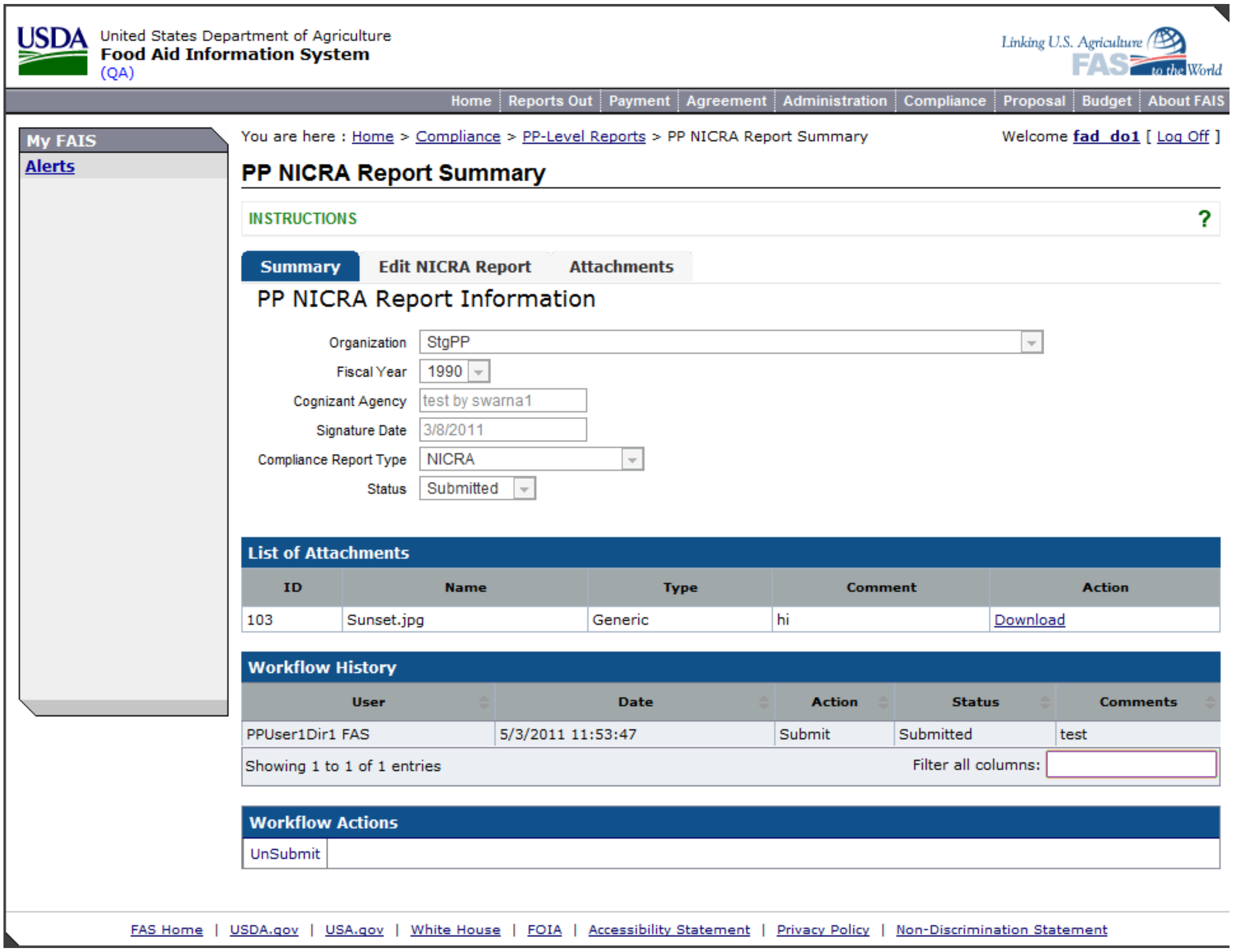
FAD user can view the PP NICRA report summary by selecting Summary on the PP-Level Report page, the Program Participant NICRA Summary page opens.

The FAD user can only view the summary page details but cannot edit it. However the FAD user can unsubmit the report.

The summary also shows the following:

- **List of Attachments** associated with the report. If any attachments are listed, use the **download** link to access the attached file.

- **Workflow History** showing the actions taken on this report



3.1.2 Editing PP NICRA Report

To create a new PP NICRA report, enter the following details as described below:

1. Select the name of the organization from the drop down list
2. Select the fiscal year from the drop down list.
3. Enter the name of the cognizant agency in the **Cognizant Agency** field.
4. Select the Compliance Report type from the droop down list
5. Select the signature date.
6. Select the status from the drop down list
7. Select **Save** to save.

3.1.2 Attaching Supporting documents

A user can attach supporting documents by selecting the Attachments tab. To upload a file:

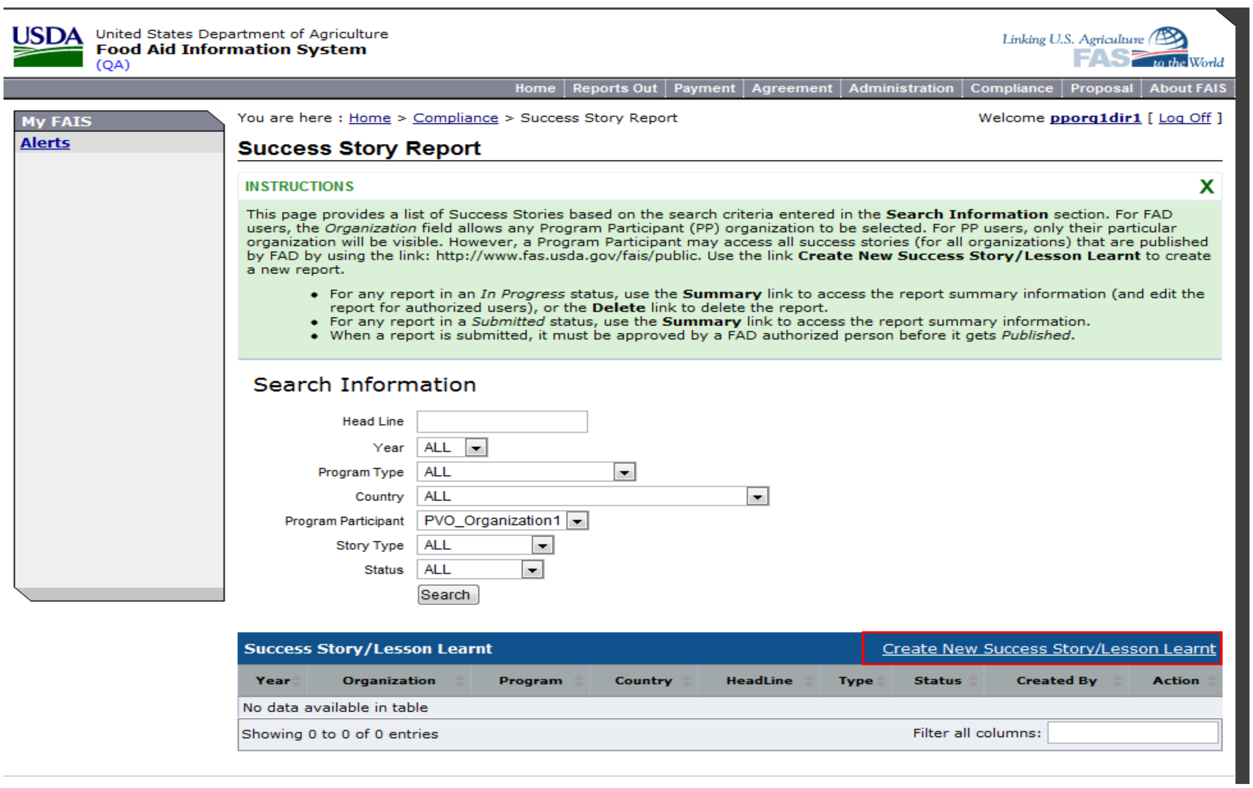
1. Select a File Type from the drop down list
2. Select the file type by selecting Choose File, browse your local computer and select the file you want to upload.
3. Enter comments in the **Comment** field
4. Select **Upload** to upload the documents.

3.0 Success Story Report

3.1.2 Accessing Success story report

To access success stories

1. Select Compliance from the menu bar
2. From the drop down select Success Story report, the Success Story Report page opens.
3. FAD users can view, edit and unsubmit based on the reports they select. Some reports cannot bed edited by a FAD user but the user can unsubmit them.

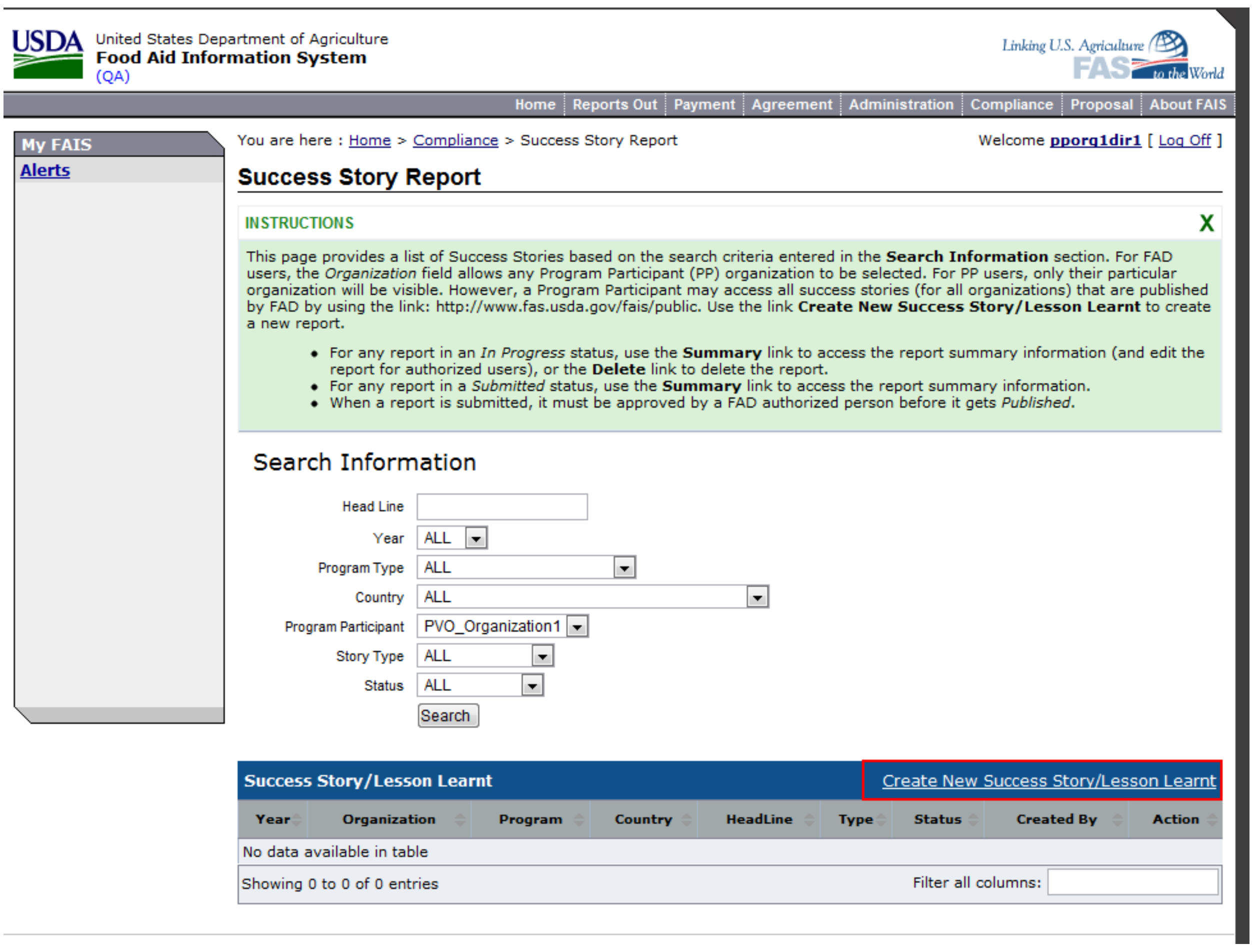


3.1.2 Searching Success Story reports

The Success Story report page displays a list of Success Stories based on the search criteria entered in the **Search Information** section.

The search yields different results based on the user type . For FAD users, the **Organization** field allows any Program Participant (PP) organization to be selected. For PP users, only their particular organization will be visible. However, a Program Participant may access all success stories (for all organizations) that are published by FAD by using the link: http://www.fas.usda.gov/fais/public.

1. Select the **Summary** link to access the report summary information for reports in progress.
2. Select the **Summary** link to access the report summary information for a report in the submitted status.
3. When a report is submitted, it must be approved by a FAD authorized person before it gets published.
4. Select **Delete** to delete the report



3.1.3 Creating Success Stories/ Lessons Learnt

To create a new success story/lessons learnt, select **Create New Success Story/Lessons Learnt** from the success Story report page. The Create New Success Story Report page opens. To create a new success story/lessons learnt you need to enter the following details:

This page allows a success story to be created.

- **Program Participant:** The Program Participant Organization to which the report applies. If the report is being created by a PP staff member, only the organization to which the person belongs will be selected. If the report is being created by a FAD staff member, all organizations will be listed and one must be selected.

1. Enter the Title of the success story in the **Headline** field.
2. Enter Year to which the success story corresponds in the **Year** field.
3. Enter the Program type to which the success story corresponds to in the **Program Type** field.
4. Enter the Country to which the success story corresponds to in the **Country** field.
5. Once all the previous parameters are selected, the **Agreements** box will be populated with all appropriate agreements that satisfy the selections. You may select one or more agreements and use the **>** button that resides between the two boxes to move them to the **Assigned Agreements**. You may also use **>>** to select all agreement, and **<** or **<<** to deselect agreements.
6. Select the appropriate **Story Type** from the drop down list.
7. Select the FAD person to submit the Success story to and who will approve for publication from the drop down list.
8. If the success story contains pictures, you must indicate you have permission to publish the pictures.
9. Enter the Person's name and organization name of the photographer.
10. Select the checkbox to indicate whether the success story writer gives FAD permission to publish the story.
11. Select **Save** to save.

Note: The fields in yellow are mandatory.