

Instructions for Completion of the Revised CSREES-REPT

The revised CSREES-REPT has been designed so that each institution will submit only one form with attached brief summaries for each fiscal year. This form should be used beginning with reporting for fiscal year (FY) 2005. The new form allows for reporting on all three AREERA requirements: Hatch integrated; Smith-Lever multistate; and Smith-Lever integrated and includes a certification statement, which was suggested by the USDA Office of the Inspector General. One form should be submitted for each fiscal year; do not mingle funds from prior fiscal years with the current year. If you have carryover from a previous year which was reserved for the AREERA requirement and have now expended it for all three categories, submit a "Final" report for that fiscal year. If you are submitting a report for any year and have carryover into the next fiscal year, submit an "Interim" report by the due date for the year in which the funds were allocated. Do not submit a Final report for any fiscal year until the full requirement has been met for all three AREERA requirement categories. If you know that you will be unable to meet your target for any fiscal year, please contact Brenda Barnett (bbarnett@csrees.usda.gov) and Janet Downey (jdowney@csrees.usda.gov) via email with the information. CSREES will be required to reduce your funding in a subsequent year by the amount not matched.

To complete the form, enter the reporting year and check the report type: *Interim* or *Final*. Indicate *Interim*, if you have not met your target in any category; enter *Final* if you have met the requirements in all categories. If this is an *Interim* report you should have a carryover balance to enter in at least one of the three categories. After the carryover balance has been expended for all categories, you should submit a *Final* report for that fiscal year. Keep in mind that reports are still due on April 1, whether *Final* or *Interim*. The *Final* report may be submitted as soon as the requirements for a fiscal year have been met. For example, an *Interim* report is submitted on April 1, and the carryover is expended in July. A *Final* report may be submitted in July for the fiscal year of fund allocation.

For each category enter your institution's established target percentage, allocation amount, and target dollar amount for the fiscal year being reported. Then enter the project names and dollars spent in the appropriate column(s). Add the amounts in each column and enter the total for each column. Then subtract this sum from the target dollar amount in the column and enter this amount as carryover. When submitting subsequent reports we will compare all reports for the fiscal year to ensure that the targets have been met.

In a second (or subsequent) *Interim* Report or a *Final* Report for a fiscal year, use your copy of the form you submitted previously for the fiscal year and update the form with new Projects added and revised or additional expenditure amounts. A Final Report should not contain carryover.

You must include brief summaries describing the activities performed on the projects listed on each CSREES-REPT you submit. These summaries are required to substantiate your report; if not submitted with the CSREES-REPT, your report will be considered "incomplete" until the summaries are received. This may affect the distribution of funding for Hatch and Smith-Lever funds to your institution. The CSREES-REPT should be signed and dated by either the Research or Extension Director or both, if desired.