



Chapter 10 – How to Copy Forward, Copy Reports, and Link/Unlink Reports

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How to Copy Forward and Link Reports—Returning Reporters

- Copy Forward – If you are reporting on an award from the previous reporting cycle and changing the Award number, DUNS number or Order number, it is imperative that you use Copy Forward to link the report in current cycle to the report in the previous reporting cycle. If a report on an award from the previous reporting cycle is not linked to a report on that same award in the current reporting cycle, the progress of the award will not be tracked, and the two reports can appear as if they are duplicates when the data is displayed on Recovery.gov.
- 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
- Linking Reports – Recipients who submitted reports in the current reporting cycle can later link those reports to ones in the previous reporting cycle by following the steps at the end of this chapter.



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: Award Number: DUNS Number:

Calendar Year: Quarter: Report Status:

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	primegrant01142010-158a	001225114			
G	primegrant03042010-402p	001225114			
G	primegrant03042010-416p	001225114	S	\$98976666.00	0
G	primeGrantDraft/924140p	002512481	S	\$0.00	1
G	primegrantExcel/924400p	002512481	S	\$510000.00	0

Click the Award Number link to open the desired report.



- Click “Copy Forward” on the report.

Prime Recipient Reporting

[Download PDF](#) [Download Report Comments](#)

Copy Forward

Click the “Copy Forward” button to start the Copy Forward process.

Prime Recipient Data

Please view the [field information page](#) if you require clarification about the fields that appear on this form.
All fields marked with an asterisk (*) are required unless otherwise noted.

Report Information

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

Final Report **Order Number**

No

- 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.
- To link the Copy From award information to the report you are copying forward, enter the Award number, Prime DUNS, and Order and select “Yes” in response to “Is this a continuation of a January 2010 report,” to link the Copy From report information to the Copy To report information. Clicking on “No” will create a new report.

- 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.”

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.
- Click the “Submit” button on the online form. The link between the previous and current reporting cycle report has been established.
- If you are an XML, Excel, or batch submitter, you may upload your report after using the online Copy Forward function.

NOTE: If you changed the Award Number, DUNS Number, or Order Number on the Copy Report Forward page, please ensure that this information is reflected in the uploaded file. Failure to do this will result in an erroneous report.

You may change the Award number, the DUNS number, or the Order number on the Copy Report Forward page.

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



FederalReporting.gov

Home | About | Downloads | FAQ | Help

Hello, Recipient User (Recipient User)
[You have 1 unread messages.](#)

Prime Recipient Reporting

Prime Recipient Data
Please view the [field information page](#) if you require clarification about the fields that appear on this form.

Report Information

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

Final Report

- o 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.
- o 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 Link or Unlink Reports

This functionality allows for the linking of a prime recipient report submitted in the current reporting cycle to a report submitted in the previous reporting cycle. It is important to note that you are not allowed to link a current reporting cycle report to one submitted two or three reporting cycles back. For example, if the current reporting cycle is April 2010, you can link a report filed in April 2010 to one filed in January 2010, but not one filed in October 2009.

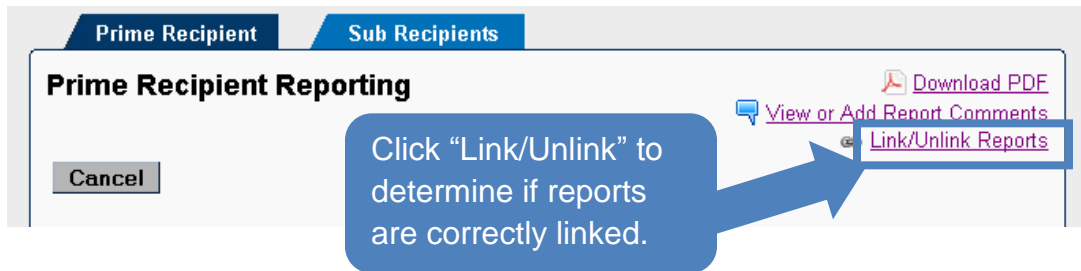
The Link/Unlink functionality is available during all reporting phases except for the Published phase. During the Agency Review phase, the agency must comment on the report first to unlock it for editing.

There are several reasons a prime recipient would manually link reports:

- o During the Agency Review or Continuous QA phase, your awarding agency adds a comment to a report indicating that it should be linked to a report in the previous reporting cycle.
- o After submitting a report in the current reporting cycle, you want to link the current report to a report in the previous reporting cycle that has a different Award ID, Order number or DUNS number.

If the report in the current reporting cycle has the same Award ID, Order #, and DUNS number as the report in the previous reporting cycle, the two reports are automatically linked and no further action is required.

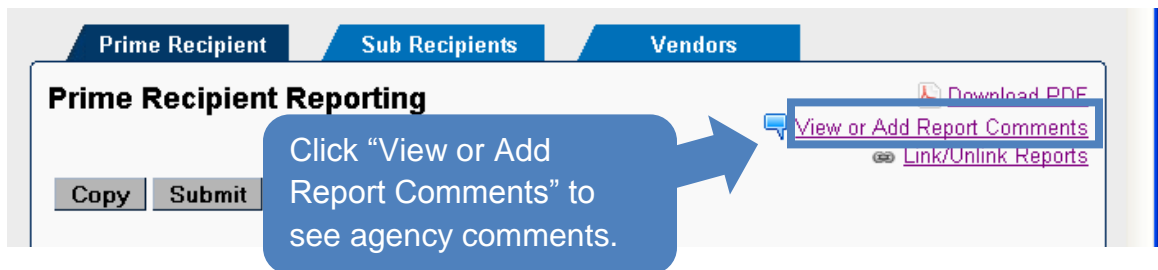
- o You erroneously submitted a report in the previous reporting cycle as a Grant award, but the award is actually a federally awarded contract. You can submit a report in the current reporting cycle as a federally awarded contract and link that report to the old grant report.
- **Agency Process to Request Recipient to Link/Unlink Reports**
 - o On the home page, click on “Prime Recipient” link under the My Reports section to view prime recipient reports submitted for your agency.
 - o Search for the current reporting cycle report to review and open the report found in the Search Results section.
 - o Click “Link/Unlink Report.”



- o Determine if reports are linked appropriately. If the current report is not correctly linked, click “Cancel” to return to the Prime Recipient Reporting page.
- o Click “View or Add Report Comments.”
- o Add a comment requesting the recipient to change, edit, or unlink the reports.
- o Prime recipient receives an email notification through user email and the FederalReporting.gov inbox. A work queue item will also appear in the prime recipient’s work queue.

• **How Recipients Link Reports**

- o On home page, click on “My Work Queue” link in the Administration section.
- o In the list of reports that need action, click on the report with comments to go to the Prime Recipient Reporting page.
- o Click on “View or Add Report Comments” to see specific comment added.



- o Close the “View or Add Report Comments” window and click on “Link/Unlink Reports.”



- o On the Link/Unlink Reports page, the April 2010 Report Information box displays the report submitted in the current reporting cycle; the January 2010 Report Information box displays either the January 2010 report that the current report is linked to or the box will reflect that the current report is not linked to any other report.
- o To search for the January 2010 report that should be linked to the April 2010 report, enter information into the Search Filters. Click “Search” to see the Search Results.
- o Click on the January 2010 report that should be linked to the April 2010 report.

Link/Unlink Reports

Use this functionality to link a prime report in the current reporting cycle to one submitted in the previous quarter. You may only link to reports submitted in the previous reporting cycle. You may also unlink or change a previously established link.

Cancel

April 2010 Report Information

Award Type	Award Number	Prime DUNS
Grant	7NV340NV3	001225114

January 2010 Report Information

Award Type	Award Number	Prime DUNS
Grant	HF-267392	002512481

Unlink

Search Filters

Use the search filters to locate the previous quarter report you would like to link to the current report.

Award Type: Award Number: DUNS Number:

Search

January 2010 Reports

Select the report you would like to link to the current report.



- o On the Link Reports page, you will see the April 2010 report, the existing January 2010 that the April 2010 report is linked to (this box may be empty if there is no existing link), and the new January 2010 report that you selected to link to the April 2010 report.
- o Check the Terms and Conditions box and enter your FRPIN.
- o Click “Update Link.”

Link Reports

April 2010 Report Information

Award Type Grant
Award Number 7NV340NV3
Prime DUNS 001225114
Calendar Year / Quarter 2010 / 1

Existing January 2010 Report Information

Award Type Grant
Award Number HF-267392
Prime DUNS 002512481
Calendar Year / Quarter 2009 / 4

New January 2010 Report Information

Award Type Grant
Award Number 7NV340NV3
Prime DUNS 878073139
Calendar Year / Quarter 2009 / 4

Terms and Conditions

I acknowledge that I am linking the previous quarter report to current quarter report listed above. I understand that in doing so, any previous report linkage will be broken and replaced with the link created by this action.

DUNS Number 001225114
FRPIN



- o The Link Confirmation page shows the April 2010 Report Information and the Revised January 2010 Report Information with the newly linked report.

Link Report Confirmation

Update successful.

April 2010 Report Information

Award Type Grant
Award Number 7NV340NV3
Prime DUNS 001225114
Calendar Year / Quarter 2010 / 1

Revised January 2010 Report Information

Award Type Grant
Award Number 7NV340NV3
Prime DUNS 878073139
Calendar Year / Quarter 2009 / 4

- o You will receive a notification email in your user email and the FederalReporting.gov Inbox that the reports have been linked.



- **How Recipients Unlink Reports**

- On home page, click on “My Work Queue” link under the Administration section
- In the list of reports that need action, click on the report with comment requesting that the report be unlinked.
- On the Recipient Report page, click “Link/Unlink Reports.”
- In January 2010 Report Information box, click “Unlink.”

- On the Unlink Report page, check the Terms and Conditions box, enter your FRPIN, and click “Unlink.”
- The Unlink Report Confirmation page displays the April 2010 Report Information and the January 2010 Report Information box is empty.

- You will receive a notification email in your user email and FederalReporting.gov inbox that the reports have been unlinked.