When and Why to Use the Copy Forward Function

If you are reporting on an award from the last reporting cycle **and changing the Award ID, the DUNS number, or the Order #, use the Copy Forward function** to the report from the previous reporting cycle to the current reporting cycle.

Linking the reports creates an audit trail from the previous reporting cycle to the current reporting cycle and enables Recovery.gov to track the quarterly progress of a particular award. Linking also decreases the likelihood of an award being counted twice.

NOTE: The difference between the Copy Function and the Copy Forward Function: Copy Forward can only be performed only when copying a report *from the previous reporting cycle*. Copy can only be performed when copying a report *from the current reporting cycle*.

How to Link Reports with Changed Business Keys if You are a Batch, XML or Excel Submitter

To create and link a report from the previous reporting cycle to a report for the current reporting cycle, use the Copy Forward function. Since both the Change Business Key and the Copy Forward functionalities are available only available to online submitters, the Batch, XML, and Excel submitters must establish report links – and change business key information if necessary – before submitting reports.

If you are a Batch, XML or Excel submitter, follow the steps below to link reports and change business key information. Please note that these steps are high-level instructions. For step-by-step instructions on Copy Forward and File Submission, please see Chapter 10 of the FederalReporting.gov User Guide at
https://www.federalreporting.gov/federalreporting/downloads.do.

1. Log onto FederalReporting.gov
2. Navigate to the My Reports page
3. Search and open the previous reporting quarter report
4. Click "Copy Forward" to copy the report's information
5. The Copy Report Forward page has a Copy To section. This is where business key information can be changed. If necessary, enter the new Award Number, Order Number (for contracts) and/or DUNS number
6. Click "Confirm Copy" to proceed
7. Since updates will enter the system via Batch, XML or Excel, it is not necessary to update the report details at this moment. Click "Save as Draft."
8. Prepare the Batch, Excel or XML file for submission. The business key in the file should match the new business keys entered in Step 5.
9. Submit the Batch, Excel or XML file.

How to Use Copy Forward and Copy for Online Reporters

<u>Copy Forward – Use only to link a report from a previous reporting cycle to the current
reporting cycle.</u>

1. Click on My Reports – Prime Recipient (or Sub Recipient) link to search for a report
2. Set the Calendar Year and Calendar Month to the previous reporting month and search
   for the report to be copied. Only reports from the previous reporting month can be
   copied with the Copy Forward function
3. Once the report is opened, click on the "Copy Forward" button to copy the report to the
   current quarter. Read the pop-up warning message and click on OK to proceed
4. The Copy Report Forward page is displayed. While on this page, user has the option to
   change the award number, prime DUNS, Order Number (for Federally Awarded
   Contracts) and to include Sub Recipient Reports. This is the only page where report keys
   can be changed prior to copying. Click on "Confirm Copy Forward" button to proceed
5. Depending on the user and award type, the system displays either a Sub Recipient
   report or Prime Recipient report with conditional Sub Recipient and/or Vendor tabs. For
   example, if a Prime Recipient grant report is copied forward, then the user will see the
   Prime Recipient, Sub Recipient, and the Vendor tabs. If a Sub Recipient grant report is
   copied forward, then the user will see the Sub Recipient and Vendor tabs.
6. The user has the option to modify non-business key information before saving or
   submitting the report. This includes recipient and award information, sub recipient
   information, or vendor information. To save the report, click the "Save as Draft" button.
   To submit the report, click the "Submit" button.
7. If the user decides to submit the report, the system will display the Confirm Initial
   Submission page. To complete the submission, enter the FRPIN for the DUNS and click
   on Submit

<u>Copy – Use only to copy a report in the current reporting cycle.</u>

1. Click on My Reports – Prime Recipient (or Sub Recipient) link to search for a report
2. Set the Calendar Year, Quarter to the current reporting quarter and search for the
   report to be copied. Only reports from the current quarter can be copied with the Copy
   function
3. Once the report is opened, click on the "Copy" button to copy the report. Read the pop-
   up warning message and click the "OK" button to proceed
4. The Copy Report page is displayed. While on this page, user has the option to change
   the award number, prime DUNS, Order Number (for Federally Awarded Contracts) and
   to include Sub Recipient Reports. Since the business keys must be unique, the user
   must change at least one of the key fields before proceeding. Click the "Confirm Copy"
   button to proceed
5. Depending on the user and award type, the system displays either a Sub Recipient
   report or Prime Recipient report with conditional Sub Recipient and/or Vendor tabs. For
   example, if a Prime Recipient grant report is copied forward, then the user will see the
   Prime Recipient, Sub Recipient, and the Vendor tabs. If a Sub Recipient grant report is
   copied forward, then the user will see the Sub Recipient and Vendor tabs.
6. The user has the option to modify non-business key information before saving or
   submitting the report. This includes recipient and award information, sub recipient
   information, or vendor information. To save the report, click the "Save as Draft" button.
   To submit the report, click the "Submit" button.

7. If the user decides to submit the report, the system will display the Confirm Initial Submission page. To complete the submission, enter the FRPIN for the DUNS and click on Submit

For detailed step-by-step instructions on Copy and Copy Forward, please see Chapter 10 of the FederalReporting.gov User Guide at https://www.federalreporting.gov/federalreporting/downloads.do.