



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

In this chapter:

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- o *How to Modify a Copied Forward Report*
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- o *How to Submit as Initial Submission*
- o *How to Copy a Report*
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- o *How to Unlink Reports*

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:
 - o You must be registered
 - o You must be able to log on to FederalReporting.gov
 - o You must have created a draft report or submitted a report to FederalReporting.gov in the previous quarter
 - o The reporting phase must be Initial Submission
- Online Copy Forward—If you are creating and submitting a new report online, FederalReporting.gov will validate the new report’s Award Number and DUNS number against any reports you submitted in the previous quarter.
 - o If a match is found, you will receive a notification recommending that you Copy Forward to link the two reports (see page 10-2).
 - o If a match is not found, you can continue to create and submit the report.



- Batch Submissions and Uploads – If you attempt to submit a new report with an Award Number and/or DUNS number similar to a report submitted in the previous quarter, you may receive an email recommending that you link the reports. Step-by-step instructions for the linking reports will be in the email, as well as in the “How to Link or Unlink Reports” section of this chapter (page 10-10).
- Linking Reports – If you submitted a report in the current reporting cycle, you can link that report to one submitted in a prior reporting cycle by following the instructions in the “How to Link or Unlink Reports” section of this chapter (page 10-10).

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”
 - o Calendar Year = Select a Calendar Year
 - o Calendar Quarter = Select a Previous Calendar Quarter
 - o Report Status = Select Submitted

My Reports - Prime Recipient View

Search Filters

Award Type: All

Award Number: []

DUNS Number: []

Calendar Year: 2009

Quarter: 4

Report Status: All

Awarding Agency Code: []

CFDA Number: []

Search

[Search Tips](#)

Select previous calendar year and quarter

- You will see all reports meeting the search criteria with the following information for each report:
 - o Award Type
 - o Prime Award #/Order #
 - o Prime DUNS #
 - o Status
 - o Award Amount
 - o 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 #	Award Number	Report Status	Amount	Count
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.

The screenshot shows the 'Prime Recipient Reporting' interface. At the top, there are two tabs: 'Prime Recipient' (selected) and 'Sub Recipients'. Below the tabs, the title 'Prime Recipient Reporting' is displayed. To the right of the title, there are two links: 'Download PDF' and 'Add Report Comments'. A blue callout box with a white arrow points to a 'Copy Forward' button. The callout text reads: 'Click the “Copy Forward” button to start the Copy Forward process.' Below the button, the section 'Prime Recipient Data' is visible. It includes a link to 'field information page' and a note: 'All fields marked with an asterisk (*) are required unless otherwise noted.' Below this is a 'Report Information' section with a table:

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

Below the table, there are two fields: 'Final Report' and 'Order Number'. The 'Final Report' field has a dropdown menu with 'No' selected.

- 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 Number, Prime DUNS, Order Number, 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.

NOTE: All Sub Recipients and Vendors associated with a Prime Recipient will be copied forward with the Prime Recipient report by default. Once the report has been copied forward, you may remove Sub Recipients and Vendors from your Prime report if you choose.

- 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 (Grants and Loans only).

If you are a Sub Recipient, you will see the Sub Recipients tab and a Vendors tab (Grants and Loans only).

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.



The screenshot shows the FederalReporting.gov interface. At the top, there's a navigation bar with 'Home', 'About', 'Downloads', 'FAQ', and 'Help'. Below that, a user greeting says 'Hello, Recipient User (Recipient User)' with a link for '1 unread messages' and a 'Logoff' button. The main content area has two tabs: 'Prime Recipient' (selected) and 'Sub Recipients'. Under the 'Prime Recipient' tab, there's a 'Save as Draft' button highlighted by a blue callout box. Below this is the 'Prime Recipient Data' section, which includes a 'Report Information' table.

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

Below the table, there's a 'Final Report' dropdown menu with 'N' selected.

- 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 status 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 at any time prior to the end of the Initial Submission period. You can continue to re-submit your report to make changes while in Initial Submission phase.

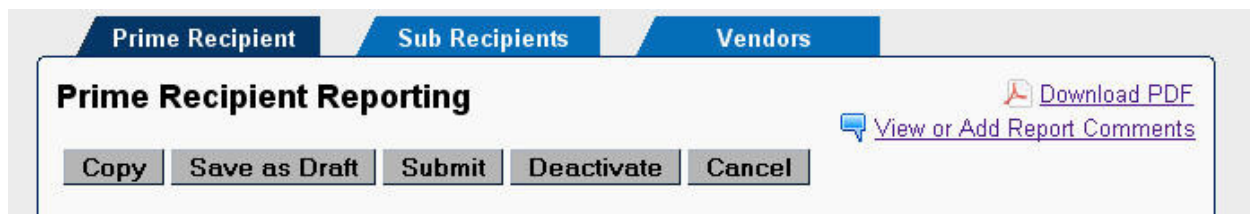
If you choose to report as a prime recipient or you are a prime submitting for yourself and sub-recipient(s), the “Save as Draft” button is located on the “Prime Recipient” tab. If you are a sub-recipient the “Save as Draft” button is located on the “Sub Recipients” tab.



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 when copying a report *from a prior 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 a prior reporting cycle.

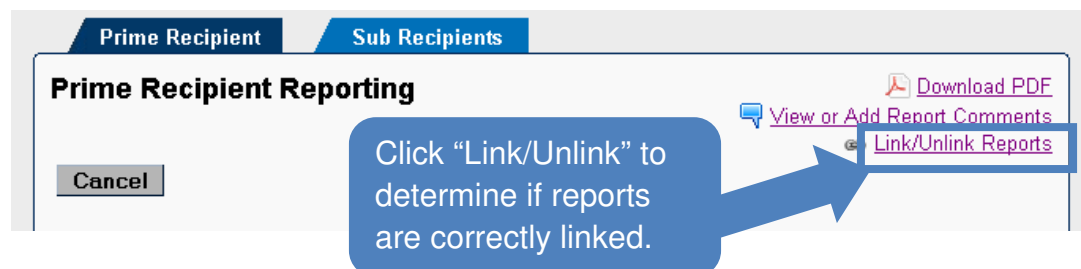
The Link/Unlink functionality is available during all reporting phases except for the Published phase. During the Agency Review phase, the agency must comment on the report first to unlock it for editing. If you would like to link a report that was submitted in a prior quarter, please see Chapter 16 of the user guide for instructions on how to submit an Administrative Data Change request to Link Reports.

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.”



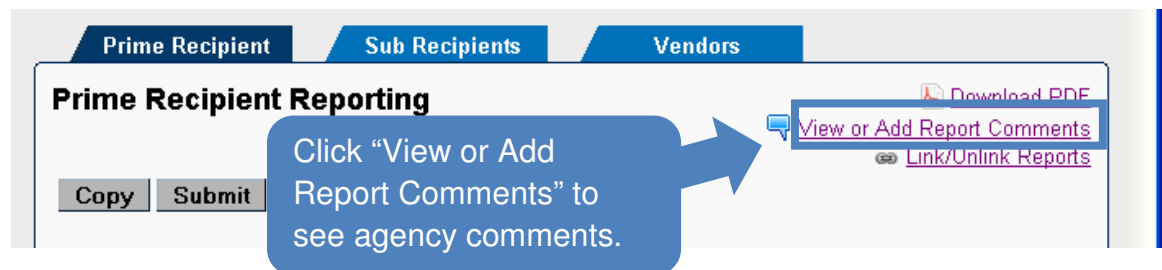


- o Determine if reports are linked appropriately. If the current report is not correctly linked, click “Cancel” to return to the Prime Recipient Reporting page.
- o Click “View or Add Report Comments.”
- o Add a comment requesting the recipient to change, edit, or unlink the reports.
- o Prime recipient 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.

NOTE: System inbox messages will be archived at the end of each reporting cycle. See Chapter 4 for more details.

- **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 in the example below, the July 2011 Report Information box displays the report submitted in the current reporting cycle; the Prior Quarter Report Information box displays either the prior quarter report that the current report is linked to or the box will reflect that no link exists for the current report.
- o To search for the prior quarter report that should be linked to the July 2011 report, enter information into the Search Filters. Click “Search” to see the Search Results.
- o Click on the prior quarter report that should be linked to the July 2011 report.

Link/Unlink Reports

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

July 2011 Report Information

Award Type	Award Number	Prime DUNS
Federally Awarded Contract	7NV340NV3	123456789
Calendar Year / Quarter	Order Number	
2011 / 2	orderNum	

Please see your Recovery.gov [Recipient Profile](#) for a full history of reports and linking.

Prior Quarter Report Information

Award Type	Award Number	Prime DUNS
Federally Awarded Contract	HF-267392	001082150
Calendar Year / Quarter	Order Number	
2011 / 1		

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:
<input type="text" value="All"/>	<input type="text"/>	<input type="text"/>
Calendar Year:	Quarter:	
<input type="text" value="All"/>	<input type="text" value="All"/>	

Reports from Prior Quarters

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

242 reports found, displaying 1 to 10. [First/Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next/Last]

Award Type	Prime Award # / Order #	Prime DUNS #	Year/Qtr	Award Amount
C	03-15-2010-changed / 10099	001000363	2010/2	\$1100000.00
C	03-15-2010-Contract-1-BK-thru-cpy / 10001	001000363	2010/1	\$1100000.00
C	03-15-2010-Contract-1-BK-thru-cpy / 10001	001000363	2010/2	\$250000.00
C	03-15-2010-Contract-1-BK-thru-cpy-nobk / 10001	001000363	2010/1	\$1000000.00
C	03-15-2010-Contract-1-GUI / 10001	001000363	2009/4	\$1000000.00
C	03-15-2010-Contract-1-GUI / 10001	001000363	2010/1	\$1000000.00



On the Link Reports page in the sample below, you will see the July 2011 report, the prior quarter report that the July 2011 report is linked to (this box may be empty if there is no existing link), and the new prior quarter report that you selected to link to the July 2011 report.

- o Check the Terms and Conditions box and enter your FRPIN.
- o Click “Update Link.”

Link Reports

July 2011 Report Information

Award Type	Award Number	Prime DUNS
Federally Awarded Contract	7NV340NV3	123456789
Calendar Year / Quarter	Order Number	
2011 / 2	orderNum	

Existing Link Report Information

This is the report information for the pre-existing link.

Award Type	Award Number	Prime DUNS
Federally Awarded Contract	HF-267392	001082150
Calendar Year / Quarter	Order Number	
2011 / 1		

Prior Quarter Report Information

This is the report information for the new report to link.

Award Type	Award Number	Prime DUNS
Federally Awarded Contract	03-15-2010-changed	001000363
Calendar Year / Quarter	Order Number	
2010 / 2	10099	

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 123456789
FRPIN



The Link Confirmation page shows the July 2011 Report Information and the Prior Quarter Report Information with the newly linked report.

Link Report Confirmation

Update successful.

July 2011 Report Information		
Award Type	Award Number	Prime DUNS
Federally Awarded Contract	7NV34QNV3	123456789
Calendar Year / Quarter	Order Number	
2011 / 2	orderNum	

Prior Quarter Report Information		
Award Type	Award Number	Prime DUNS
Federally Awarded Contract	03-15-2010-changed	001000363
Calendar Year / Quarter	Order Number	
2010 / 2	10099	

OK

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

NOTE: System inbox messages will be archived at the end of each reporting cycle. See Chapter 4 for more details.



- **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.”

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	HE...	003512...

Unlink

Search Filters

Use the search filters to locate the previous quarter.

Award Type: Award Number: DUNS Number:

Search

- 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 Prior Quarter Report Information box is empty.

Link Report Confirmation

Update successful.

July 2011 Report Information

Award Type	Award Number	Prime DUNS
Grant	7NV340NV3	001225114

Calendar Year / Quarter
2011 / 2

Prior Quarter Report Information

The link for this report has been successfully removed.

OK

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