

JSMF: Report System Overview

JSMF uses the grants.jsmf.org reporting system for submitting **Financial Reports**, **Progress Reports**, and **No Cost Extension** requests.

- Financial Reports are **due annually within 45 days of the close of the current grant period**.
- Progress Reports are **due** (annual, biennial, final due from the Principal Investigator (PI)) **within 45 days of the close of the current grant period**.
- No Cost Extension requests can be submitted at any time during the life of the grant.

System Highlights

- For all reports, you may upload a supplemental file to be attached to the submission.
- Emailed receipts that include all submitted data and uploaded attachments.
- Ability to start work on a Financial Report and return later to complete it. You can also share a link to the report with a colleague to help or for reviewing purposes.
- Emailed alerts when a report is rejected by JSMF due to a reporting error or a problem.
- If a Financial Report is rejected (for example, if it includes unallowable expenses like tuition reimbursement), the PI and accountant on file for the grant will receive an email from JSMF alerting that there is a problem. JSMF's grant manager will follow up with an email detailing the clarification and/or revision needed.
- Prompts for No Cost Extension requests within a Financial Report submission. If a grant has a carryover balance and is scheduled to end within 18 months, the user will receive an option to submit a No Cost Extension request as part of the Financial Report.
- Prompt for Carryover balance explanation. If a grant has a carryover balance of 40% or more of the total available balance amount received from JSMF, then a carryover balance explanation will be requested.

NEW: Top 5 Reasons Financial Reports are Rejected

1. Using cumulative financial numbers instead of annual (based on award period).
2. Carryover amount reported on last report is not the same as what is shown on current submission.
3. Amount received during past period is incorrect. Be sure to include all new payments from JSMF (scheduled and/or any accelerated payments made); if a transferred grant, unused funds received directly from the transferor institution.
4. Because the financial reporting module does not accept negative numbers, any corrections to previously submitted reports must be amended by deducting (or crediting) changes to the amount received or from the expense line item with a detailed explanation.
5. The PI cannot certify his or her own Financial Report. The certification must be by a grant accountant or financial officer at the grantee institution.

Get Started

To get started, visit: <http://grants.jsmf.org>

Step 1: Enter the JSMF grant number

Grant ID #	<input type="text"/>	<input type="button" value="Submit"/>
------------	----------------------	---------------------------------------

Step 2: Confirm

<h3>Is this your grant?</h3> <p>Please confirm that we've properly identified your grant and then click Yes to proceed.</p> <div style="text-align: right;"><input type="button" value="No"/> <input type="button" value="Yes"/></div>
--

Step 3: Select the Report Type

Reports	
Financial Report	>
Progress Report	>
No Cost Extension	>

Financial Reports

To help with submitting a financial report, we offer these categories to assist with categorizing expenditures.

Personnel Costs (do <u>not</u> group expenditures)	Direct Costs (grouping by category is allowed)	Encumbrances (grouping by category is allowed)
<p>Category</p> <ul style="list-style-type: none"> • PI • Co-PI • Postdoc • Consultant • Intern • Laboratory Assistant • Research Assistant • Research Associate • Research Fellow • Research Specialist • Research Support Staff • Student – Undergraduate • Student – Graduate • Technician • Temporary Worker • Other (must explain) <p>Effort %</p> <p>Actual in \$</p> <p>Benefits in \$</p> <p>Notes: Include relevant information about this expense.</p>	<p>Category</p> <ul style="list-style-type: none"> • Animals/Animal Care • Computing Services • Data Processing • Equipment • Human Subjects • Imaging Scanning • Meeting • Publication Costs • Service Contacts • Supplies • Subcontract (provide name of institution) • Travel <ul style="list-style-type: none"> ○ Collaborators ○ Seminar Speakers ○ Student Travel ○ Patient ○ PI/Co-PI • Other (must explain) <p>Actual</p> <p>Notes: Include relevant information about this expense.</p>	<p>Category</p> <ul style="list-style-type: none"> • Equipment • Meeting or Workshop • Subcontract • Other (must explain) <p>Amount</p> <p>Notes: Include relevant information about this encumbrance.</p>
<p>Allowable Budget Items for JSMF Grants</p>		
<p>For information about allowable budget items for grant types, visit this link: https://www.jsmf.org/admin/JSMF%20Grant%20Budget%20Table.pdf</p>		

Financial Reports begin by asking users to **Enter the Total Amount Received this Accounting Period** (any payments received from JSMF during this period) as well as provide the **Carry-Over Balance from the Last Report**, if any.

Important: All reports should be for the annual accounting period for this grant. Cumulative reports are no longer permitted.

Financial Report

All Financial Reports submitted through this system must be annual for the appropriate accounting period. Cumulative

	JSMF's Records	University College Lond
Total Amount of Award	\$600,000.00	
Total Amount Paid	\$450,000.00	
Total Amount Received this Accounting Period (11/1/2013 - 11/2/2014) (not cumulative amount received)	\$150,000.00	<input type="text"/>
Carry-Over Balance from Last Report	Not found	<input type="text"/>

Here is an example. During the period 11/1/2013 – 11/2/2014, JSMF made a grant payment in the amount of \$150,000. This amount should be entered in the Total Amount Received this Accounting Period field.

On the last Financial Report for this grant for period 11/1/2012 – 11/1/2013, there was a carry-over (unused) balance of \$186,000. This amount should be entered in the Carry-Over Balance from Last Report field.

Financial Report

All Financial Reports submitted through this system must be annual for the appropriate accounting period. Ci

	JSMF's Records	University Colle
Total Amount of Award	\$600,000.00	
Total Amount Paid	\$450,000.00	
Total Amount Received this Accounting Period (11/1/2013 - 11/2/2014) (not cumulative amount received)	\$150,000.00	<input type="text" value="\$150,000.00"/>
Carry-Over Balance from Last Report	Not found	<input type="text" value="\$186,000.00"/>

The next step is to add expenses by line item. Personnel costs should not be grouped. However, direct costs may be grouped together by category, as appropriate.

If there is a supplemental file (PDF, Word, etc.) that should be included as part of this report, click the Choose File button to select and upload the file.

Home / Financial Report

Share With Colleagues

Expenses

Personnel Costs

Add Expense

Direct Costs

Add Expense

Encumbrances

Add Expense

Supplemental file related to this request: (Optional) No file chosen

Back Next

Click the Add Expense button, and a pop-up will appear. Here is how Personnel Costs looks:

Add Personnel Cost

Category	<input type="text"/>
Effort %	PI Co-PI Postdoc
Actual	_____ Consultant Intern
Benefits	Laboratory Assistant Research Assistant Research Associate Research Fellow Research Specialist Research Support Staff
Notes	Student - Undergraduate Student - Graduate Technician Temporary Worker Other (must explain)

Edit Personnel Cost

Category	Laboratory Assistant
Effort %	100 %
Actual	\$24,000.00
Benefits	\$5,000.00
Notes	Jane Doe

Benefits or "fringe benefits" should include items like health insurance, dental insurance, and retirement contributions. Tuition or 'continuing student fees' and indirect costs are not permitted.

Include relevant information about this expense.

Entered expenses will appear like this. To make a change to an expense, click the green box. To delete an expense, click the red box.

Expenses

Personnel Costs

[Add Expense](#)

Category	Effort %	Amount	Fringe Benefits	Notes	
Laboratory Assistant	100	\$24,000.00	\$5,000.00 (17%)	Jane Doe	✎ ✖

If the carryover balance is greater than or equal to 40% of the Total Available Balance (prior report carryover balance plus any new grant payments for this reporting period), this screen will appear. Enter a sentence or two explaining the reason for the carryover balance. **Carryovers are automatically approved by JSMF.** We would like to be informed of planned grant expenditures if the P.I. wishes to make changes from the originally-approved budget justification narrative.

Carryover Balance

Your have a carryover balance that is greater than or equal to 40% of the Total Available Balance (prior report carryover balance plus any new grant payments this reporting period).

Required Explanation:

[Back](#) [Next](#)

If there is a carryover balance and the grant is scheduled to end within 24 months, this screen will appear. You may request a No Cost Extension at this time, or you may return to grants.jsmf.org and submit a request at a later time.

No-Cost Extension

This grant is scheduled to end on November 1, 2014. Would you like to request a no-cost extension at the time? You may always return to grants.jsmf.org at a later time to request a No-Cost extension.

[Back](#) [No](#) [Yes](#)

The Summary page provides a review of the financial report submission.

Summary

Total Grant Amount:	\$449,515.00
Report Period:	12/30/13 - 12/31/14
Total Received this Accounting Period:	\$510,813.00
Carry-Over from Last Report:	<u>+\$25,000.00</u>
Total Receipts for this Accounting Period:	\$535,813.00
Total Expenditures this Report:	<u>-\$29,000.00</u>
Carry-Over for Next Accounting Period:	\$506,813.00
Total Encumbrances this Report:	\$0.00

Line Item Categories	Expenditures	Fringe Benefits	Total	Notes
Personnel Expenses				
Laboratory Assistant	\$24,000.00	\$5,000.00 (17%)	\$29,000.00	* Jane Doe
Total Personnel Expenses	\$24,000.00	\$5,000.00	\$29,000.00	

The final step is certification of the report. After entering this information and clicking the checkbox, the submit button will finalize the report and send it to JSMF.

Signature

I certify that all expenditures reported or payments requested are for appropriate purposes and are in accordance with the agreement set forth in the award documents.

Name / Title

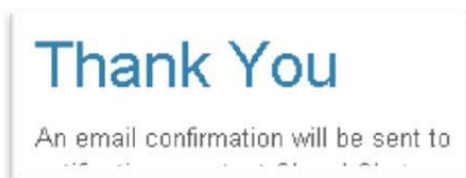
Email Address

Telephone Number

Date of Certification

This submission is complete and ready to submit.

On the Thank You confirmation page, you will have the opportunity to review or download the PDF generated for this report. You will also see the PI and Accountant on file for receiving these confirmation emails as well as automatic reminder emails that are sent when a report is upcoming or past due. To update the accountant on file with JSMF for a particular grant, contact Cheryl Chatman at chatman@jsmf.org with the new information.



Progress Reports

Progress Reports should be completed on the appropriate template, choose the report type and then upload the file.

Home / Progress Report

Upload Progress Report

Progress Reports should use the appropriate template based on the award type and report period. Templates are in Word (.docx) format.

- Postdoctoral Fellowship Awards: [Final Progress Report](#)
- Collaborative Activity Awards: [Annual Report](#) | [Final Report](#)
- Research Awards: [Annual Report](#) | [Final Report](#)
- Scholar Awards: [Mid-term or Biennial report](#) | [Final Report](#)

You may upload a PDF, Word file, or RTF. Large file sizes up to 35MB are no problem.

No file chosen

No Cost Extension requests

Here is the required information for submitting a No Cost Extension request. Note that it is possible to include a supplemental file related to this request such as a budget reallocation request or detailed explanation.

HOME / NO COST EXTENSION

No Cost Extension

Grant end date: March 1, 2006

Total unexpended grant funds on hand:

Reason(s) for requesting a no cost extension:

New grant end date:

Supplemental file related to this request: (Optional)

Requested By:

Name:

Email:

CC (if any):

I understand that any outstanding Financial or Progress Reports for this grant must be submitted to JSMF in order for this No Cost Extension request to be considered.

This submission is complete and ready to send to JSMF for review.