Scheduling Non-Financial Reports

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Sponsored funding is, by definition, an exchange transaction between sponsor and the institution receiving funding. As such, most sponsors require periodic reports of technical accomplishments during the life of an award. In addition to the obvious duty to fulfill sponsor obligations in good faith, the submission of an annual and/or final technical report is often tied to the release of future funding.

Purpose of Scheduling Non-Financial Reports

Many agencies require annual reports to be submitted for projects which span multiple years. The award terms and conditions specify the requirements for all reports. Like financial reports, non-financial reports must be submitted in a timely manner. They are created and submitted directly to the sponsor unless an Institutional Signature (via OSP) is required in the award terms and conditions.

Principal Investigators who fail to submit timely technical or progress reports risk losing their funding, and jeopardize the funding of other Harvard PIs. Recently, Harvard has seen an increasing number of sponsors, both federal and non-federal, exercise their right to suspend funding in these situations.

Types of Reports

Non-financial reports may include:

- Annual progress/technical reports
- Final progress/technical reports
- Equipment reports
- Patent and Invention Reports

Standard of Service

It is recommended that once a new award is received, each grant manager will schedule the applicable non-financial reports for each project they manage.

Considerations for Using GMAS

- GMAS is the sponsored projects system of record. Any reports, whether financial or non-financial, scheduled in this system is subject to audit. Therefore, the records of any non-financial reports must be complete, including when the report is submitted to the sponsor.
- CREW allows you to run a report of all the scheduled GMAS reports for your org or the funds you manage. This is a helpful planning and organizational tool that can be taken advantage of. The report titled "Scheduled Reports" is found under the Grants Management tab in CREW and the parameters can be changed in multiple ways to meet various needs. CREW reports can be saved and scheduled to run regularly.
- GMAS will send automatic e-mail reminders to the preparer if that functionality is chosen when scheduled.
- Scheduled reports will show up in the To Do's of the fund and the preparer.

Scheduling Non-Financial Reports in GMAS

1. Once the award action memo is received, reviews award to determine what non-financial reports are required
2. Navigate to the fund's Segment homepage.
3. Select the "Non-Financial reports" tab at the bottom of the homepage.
4. Click the button "Add Report."
5. Enter the relevant information for all reports, including:
   a. Report type
   b. Report preparer
   c. Period of time to be covered by the report
   d. Due date of the report
   e. Whether reminders for the report should be scheduled
   f. Any applicable comments
6. Monitor which reports are due by using the GMAS to do's or by running a CREW "Scheduled Reports" report.

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