



United States
Department of
Agriculture

National Institute
of Food
and Agriculture



BIOENERGY, CLIMATE,
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FOOD PRODUCTION
AND SUSTAINABILITY



YOUTH, FAMILY,
AND COMMUNITY



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NIFA Reporting Web Conference

September 15, 2016



United States
Department of
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- Start Recording...



Katelyn Sellers



Katelyn is the Lead for the State Plan of Work and Annual Report process as well as the business lead for the REEport system management and development. She also leads the Multistate Research Fund. Katelyn supports the planning, development, coordination, and delivery of accountability and financial reporting from agency information systems. She is also responsible for conducting business process analyses and implementing related efficiency improvements.

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Adobe Connect Support

Call: (202) 690-2910

or

servicedesk@nifa.usda.gov



Format and Logistics

- Throughout the conference, you may type questions in the chat box.
- Slides from this conference will be posted to the Reporting Web Conference resource page on the web:
<https://nifa.usda.gov/resource/reporting-web-conference-series>



Sign Up for the RWC Listserv

An RWC e-mail list notifies interested parties on news, schedules, and other issues relating to the series. To subscribe:

- Send an e-mail to lyris@lyris.nifa.usda.gov.
- Skip your subject line and in the body of your message type: **subscribe reportingwc**.
- Be sure you receive an e-mail confirming your subscription.



Today's Agenda:

- **Plan of Work Redesign**
 - Update on Working Groups
 - Timeline, User Acceptance Testing
- **ezFedGrants**
 - FY17 Capacity Funding
 - eAuthentication Level 2
- **REEReport Update**
 - Resource Allocations
 - Financial Reporting for Fiscal Year 2015
 - Project Changes



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Plan of Work



POW Redesign

- **Goal: New system ready in fall of 2018**
- 2020-2024 Plan of Work will be due in the new system on **April 1, 2019**
- 2018 Annual Reports (AR) will be due in the new system on **April 1, 2019**
- No auto-population on either the POW or AR in that first year = starting fresh!



Why does this redesign matter?

- Reduce reporting AND review burden!
- Proper stewardship of capacity and competitive funds
- Where do the data go?
 - USDA Secretary, budget justification process, Congress, White House
- How does NIFA use reports?
 - Demonstrate importance/impact of capacity funds (financial reports, outcome/impact stories, blogs, press releases, website, graphical handouts etc.)



Sneak Peek at New Reporting System Concept:

Welcome to the NIFA Reporting Portal

John Smith, State University

Select the action below you would like to take.

Submit Institutional Profile
Data for AREERA Plan of Work
and Annual Report

Submit Research Project Data
(includes capacity funded research projects
and all NIFA competitive awards)

Submit Extension Program Data
Profile Data

Submit Financial Data for
Projects and Programs

Submit an Animal health or
McIntire Stennis Program of
Research Profile Data

Query Data, Produce Reports,
Export Results

Manage My Site (users, roles, permissions, workflow)



POW Redesign Working Groups

- **Classifications**
 - Knowledge Areas, Subjects of Investigation
- **Institutional Profile Module**
 - Mandated and “must have” elements: executive summary, merit/peer review processes, multistate and integrated work, stakeholder input, estimated FTE data, project/accomplishment highlights; currently developing screen mockups.
- **Extension Module**
 - Success so far at agreeing on a general template for defining “what is an extension program” this template contains the data fields that will turn into screen mockups within next month or so.



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Grants Modernization: ezFedGrants



NIFA's Grant Modernization Initiative

USDA enterprise-wide grants management solution with:





ezFed Grants Deployment: Fall 2016

- **ONLY FY 2017 Capacity Awards** will be processed by NIFA through ezFedGrants in fall 2016.
- Applicants still apply for FY17 capacity funds through Grants.gov; payments are still drawn down through Automated Standard Application for Payment (ASAP)
- Starting in fall of 2016, institutions **may use** ezFedGrants to check status of FY17 capacity applications.
- **Required use of ezFedGrants by institutions** (that might be you!) won't occur until fall/winter 2017. This will be for the SF-425 that's due by Dec 30, 2017.



What doesn't change?

- Still use REEport to submit capacity project proposals for approval
 - **NOTHING** in REEport changes
- Still use “POW” (current and future system) to submit POWs and Annual Reports



eAuthentication Level 2 Access for ezFedGrants

- Anybody who might need to use ezFedGrants in the future **MUST** obtain USDA eAuthentication Level 2 access
- The sooner the better!
- Examples of using ezFedGrants include:
 - Checking grant application status*
 - Submitting SF-425 financial reports

**This will become more critical when NIFA starts using ezFedGrants for competitive grant programs.*



How do I get eAuth Level 2 access?

- **Step 1**, go to:
<https://identitymanager.eems.usda.gov/registration/selfRegistrationForm.aspx?level=2>
- **Step 2**: Meet in-person with a USDA Local Registration Authority (LRA)
 - Make sure you have already registered for an account with Level 2 access (per link above)
 - Must present a valid government-issued picture ID



Important:

- The deployment of ezFedGrants this fall has NO EFFECT on NIFA competitive programs.
- There is currently no timeline or specific plans for how and when NIFA will incorporate competitively funded programs into ezFedGrants.

Questions about ezFedGrants? Email grantsmod@nifa.usda.gov



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REEport Update



REEReport Resource Allocations

- With the upcoming end of fiscal year 2016, the majority of available technical resources are being used in support of the busy award season.
- Technical issues stopping workflow take priority.



Financial Report FY2015

- Financial report will be closed within the next week.
- Once closed **REPORTS WILL NO LONGER BE ACCEPTED.**
- When NIFA reports on figures it is noted that numbers are “as reported” in prior fiscal year.



Financial Report FY2015 Recap

- The Capacity financial reporting proceeded smoothly.
- The first year of competitive project financial reporting was more challenging.
- SF425 remains the auditable record for competitive projects.



Financial Reporting Enhancements

- Notices will be sent earlier
- Working on automated emails/reminders
- Automated emails will contain individual project information (e.g. proposal number, title, PD name, etc.)



Competitive Project Changes

- REEport has been enhanced to allow competitive projects to be changed.
- Changes require no NPL approval.
- Information in fields that are greyed out must still be changed by emailing your NIFA program contact.



STEP 1: Access the project you would like to edit by clicking on the title.

Home Project Initiation Progress Report Financial Report Reports **Project Change** Final Report

Track Project Change

Accession Number	<input type="text"/>	Project Number	<input type="text"/>	Proposal Number	<input type="text"/>
Performing Department	<input type="text"/>	Funding Source	<input type="text"/>	Project Director	<input type="text"/>
<input type="button" value="Search"/>		<input type="button" value="Clear Search"/>			

[Expand All Folders](#) [Collapse All Folders](#)

📁 1 Active Project(s)

Accn #	Project #	Grants.gov #	Proposal #	Title	Department	Proj. Dir	Funding	View
██████	(None)	██████████████	██████████	Strengthening and Expanding Th...	(None)	██████████	NON FOR...	PDF



STEP 2: Determine if the information can be changed in REEport. Fields that are grey cannot be edited through this process.

Home Project Initiation Progress Report Financial Report Reports Project Change Final Report

Changes Cover Participants Goals Products Outcomes Audience Methods Summary Keywords Classification Submit

Cover Page

Fields marked with an asterisk (*) are required for submission.

Please consult the [REEport Guide for Project Directors](#), for instructions on how to complete this Project Initiation form. The Cover Page collects/displays identifying information for your project, some of which is pre-populated from Grants.gov and non-editable for NIFA Competitive awards. All major following sections in REEport have a character limit of 8,000. If you work for a NIFA Partner Institution, typically Land Grant Universities, please contact your REEport

NOTE: This project has 0 comments.

« Previous Save Next »

Funding Source Status

Accession Number

Project Title

Sponsoring Agency/Institution

Performing Organization/Institution DUNS Number

Performing Department

Grants.gov Tracking Number Proposal Number

STEP 3: Locate the field that needs to be changed. Fields with a white background can be edited.

The screenshot shows a web application interface for a project report. At the top, there is a navigation bar with tabs: Home, Project Initiation, Progress Report, Financial Report, Reports, Project Change (selected), and Final Report. Below this is a secondary navigation bar with tabs: Changes, Cover, Participants, Goals (selected), Products, Outcomes, Audience, Methods, Summary, Keywords, Classification, and Submit. The main content area is titled '* Goals / Objectives' and includes a note: 'Fields marked with an asterisk (*) are required for submission.' There are navigation buttons: « Previous, Save, Next ». The primary instruction is 'What are the major goals of this project? 8,000 character limit.' Below this is a 'More...' link. A rich text editor toolbar is visible, containing icons for source, undo, redo, search, and various text formatting options (bold, italic, underline, strikethrough, subscript, superscript, link, unlink). A red arrow points to the text input area of the editor, which is currently blank. At the bottom of the form, there are additional navigation buttons: « Previous, Save, Next ».



STEP 4: Explanatory information about what you are changing and/or why can be added in the comment field prior to submission of the project change; these comments are included in the confirmation email that is sent to the PD, Site Admin, and NIFA Program Contact. They are also included in the comment history of the project in REEport.

Home Project Initiation Progress Report Financial Report Reports **Project Change** Final Report

Changes Cover Participants Goals Products Outcomes Audience Methods Summary Keywords Classification **Submit**

Submit Changes
Review in PDF format

* NOTE: The current project changes require no approval from NIFA and will automatically be implemented once submitted to NIFA.

Comments

This is a test.

Submit to NIFA Save

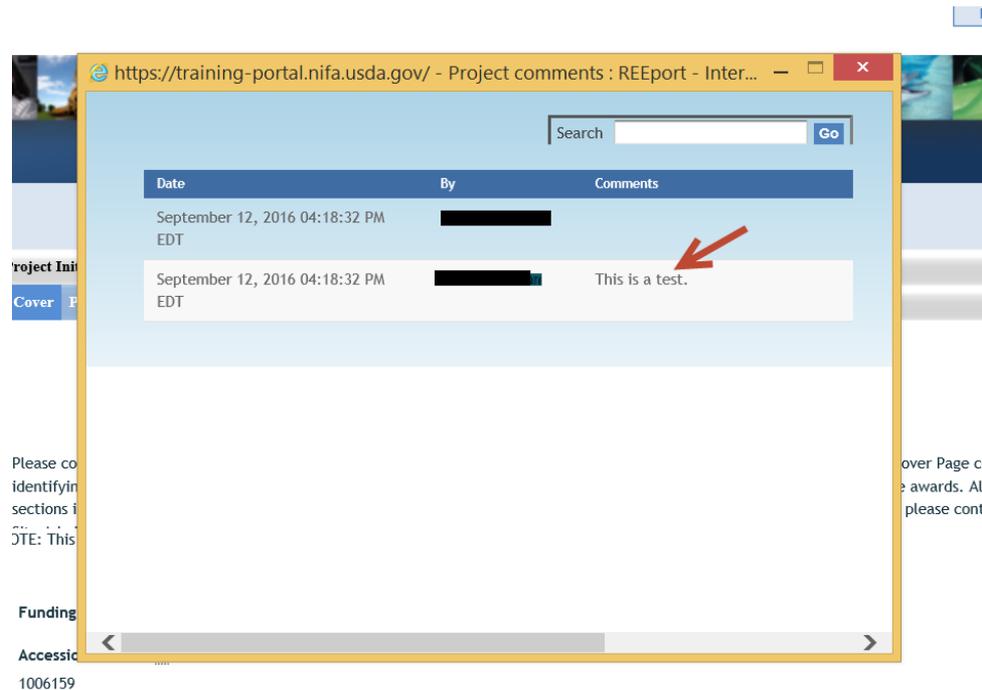


Comment history can be accessed on the cover page

The screenshot displays the NIFA REEport interface. At the top, a navigation bar includes tabs for Home, Project Initiation, Progress Report, Financial Report, Reports, Project Change, and Final Report. Below this, a secondary navigation bar highlights the 'Cover' tab, with a red arrow pointing to it. The main content area is titled 'Cover Page' and contains a note about required fields. A paragraph of instructions follows, mentioning the REEport Guide for Project Directors and character limits. A 'NOTE' indicates that the project has 1 comment, with a red arrow pointing to the number '1'. Below the note is a '« Previous Save Next »' button. The form fields shown are: 'Funding Source' (dropdown menu, value: NON FORMULA), 'Status' (dropdown menu, value: ACTIVE), 'Accession Number' (text input field, value: [REDACTED]), 'Project Title' (text input field, value: Strengthening and Expanding The Food Trust`s Food Bucks Network in Pennsylvania: A FINI Proposal to the National Institute of Food and Agric), and 'Sponsoring Agency/Institution' (dropdown menu, value: National Institute of Food and Agriculture).



A new window will open with your comments, as well as any comments that NIFA has made.





Capacity Project Change Refresher

- Project Director Changes
 - Site administrator must create a Project director account in REEport before that PD can be selected
- End Date Changes
 - Projects can not be backdated



STEP 1: Select the correct capacity project in the project change tab of REEport

Home Project Initiation Progress Report Financial Report Reports **Project Change** Final Report Site Administration

Track Project Change

Accession Number Project Number Proposal Number
Performing Department Funding Source Project Director
[Search](#) [Clear Search](#)

[Expand All Folders](#) [Collapse All Folders](#)

📁 127 Active Project(s)

Accn #	Project #	Grants.gov #	Proposal #	Title	Department	Proj. Dir	Funding	View
		(N/A)	(N/A)	Enhancing Reproductive Efficie...	Animal & Vet...		HATCH	PDF 📄



STEP 2: Navigate to the cover page

STEP 3: Select correct new end date and/or new PD

Home Project Initiation Progress Report Financial Report Reports Project Change Final Report Site Administration

Changes Cover Participants Goals Products Outcomes Audience Methods Summary Keywords Classification Proposal Assurance Statements Submit

Cover Page

Fields marked with an asterisk (*) are required for submission.

* Start Date 2016-07-01 * End Date 2021-06-30

Project Contacts

* Project Director
Select from list of Project Directors: [dropdown]

Name : [redacted]
Title : Academic Faculty
Email Address : [redacted]
Phone Number : [redacted]

Site Administrator
Name : [redacted]
Title : Project Administrator
Email Address : [redacted]
Phone Number : [redacted]

« Previous Save Next »



PARS Contact Information

- Katelyn Sellers – POW and REEport Business Management
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- Adam Preuter – REEport Analysis and Customer Support
 - apreuter@nifa.usda.gov, 202-690-0124, 202-690-0009
- James Hultzman – REEport Analysis and Customer Support
 - James.Hultzman@nifa.usda.gov, 202-690-0011, 202-690-0009

REEport “Tier 1” Help Desk

- Tier 1 Support – More Staff!
- Logon issues, setting up accounts, project status tracking, technical issues
- Contact emails:
 - reeport@nifa.usda.gov
 - electronic@nifa.usda.gov



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Questions?

Please type your questions in the chat box in the lower right hand corner of your screen.



See you in November!

- Next NIFA Reporting Web Conference is scheduled for November 10, 2:00-3:30 pm (Eastern)
- Visit the RWC webpage for slides from this conference and information about future RWCs: <http://nifa.usda.gov/resource/reporting-web-conference-series>