



Office of Cannabis  
Management

# Community Reinvestment Program

## Progress Reporting Tutorial

Managing eGrants Progress Reports

MARCH 13, 2026

# AGENDA

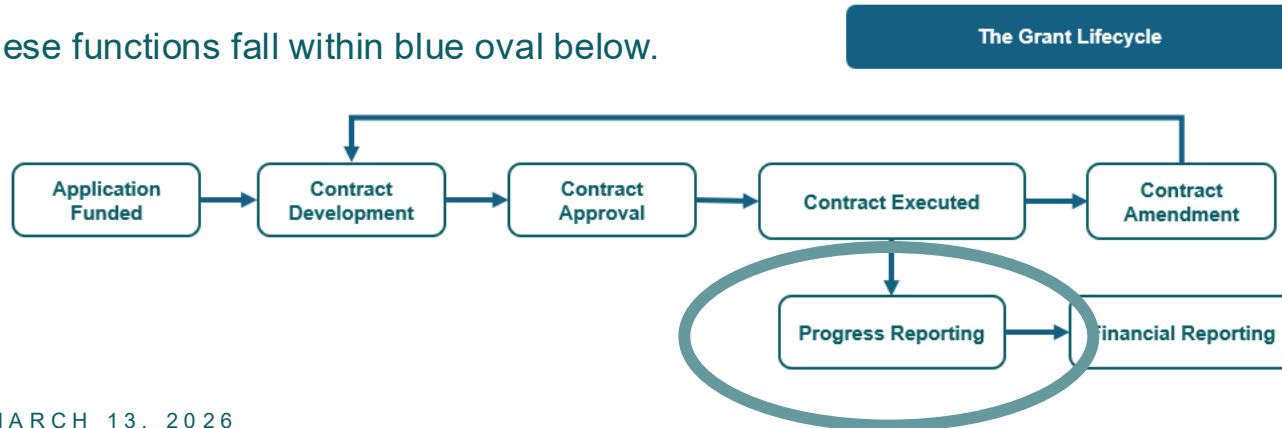
- Getting Started
- The Progress Reports Search
- The Progress Report Workflow
- Tasks and Emails
- Initiating a Progress Report
- Completing a Progress Report
- Submitting a Progress Report
- Support and Assistance

# GETTING STARTED

Once your contract has been approved and your project is underway your organization will begin reporting on the execution of its programmatic vision. To do so, it will Initiate, Complete, and Submit progress reports in eGrants. The system provides 8 progress reports – one for each period of your organization’s 2-year contract. In the following slides, you will learn skills necessary to:

- Search for progress reports
- Initiate, Complete, and Submit progress reports
- Monitor the status of progress reports

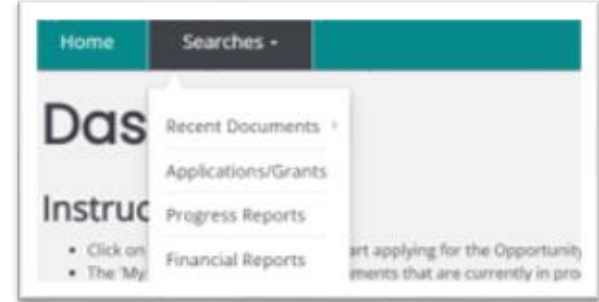
These functions fall within blue oval below.



# PROGRESS REPORT SEARCH

The **Progress Reports** search is used to locate both in process and approved reports. Some helpful tips include:

- Entering your Report Number in the **Name** field for a focused result.
- Using the **Status** field to target reports in a particular workflow status.

A screenshot of the 'Progress Reports' search interface. The page has a teal header with 'Home' and 'Searches -'. Below the header, the title 'Progress Reports' is displayed. Underneath, there are 'Instructions:' with two bullet points: '• Fill out the Search Criteria and click Search to search for a specific document.' and '• Leave the Search Criteria blank and click Search to show all your documents.' Below the instructions is a 'Document Search' section with several input fields: 'Name', 'Sub Code', 'Type' (a dropdown menu), 'Status' (a dropdown menu), 'Organization', and 'Person'. At the bottom right of the search section are 'Clear' and 'Search' buttons.

# INITIATING A PROGRESS REPORT

- Use the **Application/Grant** search to locate and access the contract.
- Verify the contract is in the status of “**Agreement Executed.**”
- Scroll to the bottom of the **Navigation** bar. The “**Initiate Related Doc**” button is displayed. Click the button.

**Document Landing Page**

**Instructions:**

- View document details.

<b>Template</b> Community Reinvestment Program Grants	<b>Instance</b> Community Reinvestment Program Grants
<b>Document Name</b> CRPG-2024-00242	<b>Document Status</b> Agreement Executed
<b>Organization</b> Joe's Nonprofit	<b>Your Role</b> Grantee Official

Progress bar with three steps: 1. Application in Progress (checked), 2. Agreement Executed (checked), 3. Amendment Executed (unchecked).

Home    Searches ▾

**CRPG-2024-00242**

- ▾ Forms
- Project Overview
- Project Budget
- Award
- Amendment
- Tools
- Status Options
- ▾ Related Documents

**Initiate Related Doc**

# INITIATING A PROGRESS REPORT CONT.

- The **Initiate Related Document** box is auto populated with your Application/Grant ID on the first or next available progress report.
- Click the **Create** button, followed by the **Proceed** button.
- The Progress Report **Document Landing Page** is displayed.

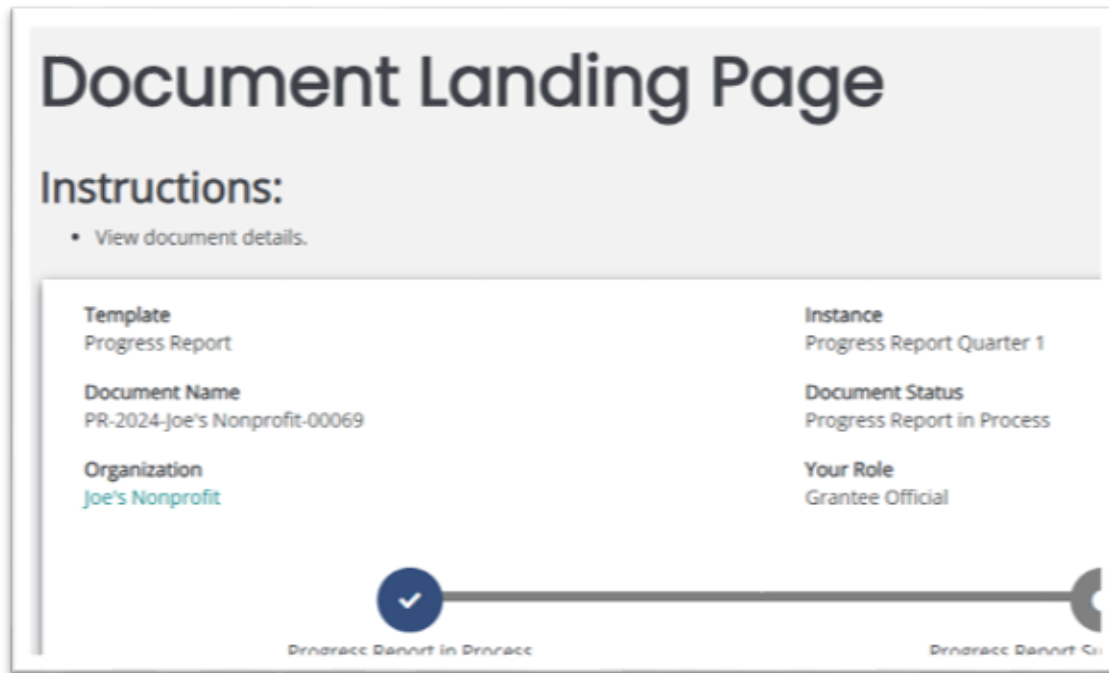
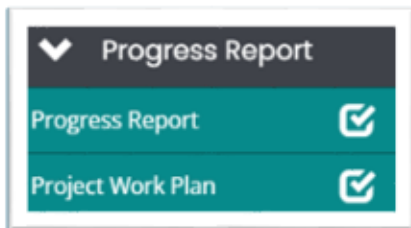
The image shows two overlapping screenshots of a web application interface. The top screenshot is titled "Initiate Related Document" and contains two dropdown menus. The first dropdown, labeled "Parent Document", has "CRPG-2024-00242" selected. The second dropdown, labeled "Available Documents", has "Progress Report Quarter 1" selected. A "Create" button is visible to the right of this form. The bottom screenshot is titled "Progress Report Quarter 1" and displays a form with the following information:

Provided By:	New York State Office of Cannabis Management
Provided To:	Joe's Nonprofit
Progress Report Availability Dates:	12/1/2023 12:00:00 AM -
Due Date:	9/30/2026 11:59:00 PM

At the bottom of this form are two buttons: "Proceed" (dark grey) and "Cancel" (red).

# COMPLETING A PROGRESS REPORT

From the **Document Landing Page**, use the **Navigation** bar to access and complete the eGrants **Progress Report** and **Project Work Plan** forms.



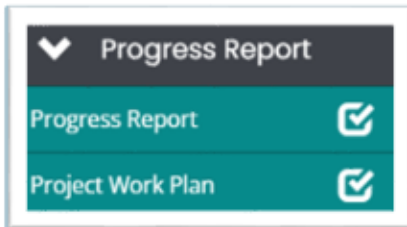
A screenshot of a 'Document Landing Page' interface. The title 'Document Landing Page' is at the top. Below it is the heading 'Instructions:' followed by a bullet point: 'View document details.' The main content area is divided into two columns of key-value pairs. The left column includes: 'Template: Progress Report', 'Document Name: PR-2024-Joe's Nonprofit-00069', and 'Organization: Joe's Nonprofit'. The right column includes: 'Instance: Progress Report Quarter 1', 'Document Status: Progress Report in Process', and 'Your Role: Grantee Official'. At the bottom, there is a progress indicator consisting of a blue circle with a white checkmark on the left, followed by a horizontal line that ends in a semi-circle on the right. The text 'Dnnracc Dnnrnt in Dnnracc' is visible at the bottom left and right of the page.

<b>Template</b> Progress Report	<b>Instance</b> Progress Report Quarter 1
<b>Document Name</b> PR-2024-Joe's Nonprofit-00069	<b>Document Status</b> Progress Report in Process
<b>Organization</b> Joe's Nonprofit	<b>Your Role</b> Grantee Official

# PROGRESS REPORT FORM

The **Progress Report** Form contains a series of questions soliciting information about your overall accomplishments for the reporting period.

Respond to each of the questions, hitting the **Save** button as you go.



## Progress Report

Report Start Date: 04/01/25	Report End Date: 06/30/25
Submitted Date:	Report Due Date: 09/30/26

Please provide an overall narrative description of progress for this project during the reporting period. Include a summary of services rendered and/or programmatic engagements completed.

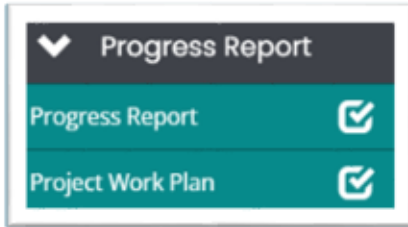
0 of 4000

# WORK PLAN FORM

A **Work Plan** form(s) is provided for each Objective included in your contract. Where more than one Objective is present, the Navigation Bar will display the folder icon. Complete all provided forms.

On each **Work Plan** form review the Objective, Task(s) and Performance Measure(s) displayed on the top half of the screen.

Next, scroll to the lower half of the screen to record your efforts to date. Be sure to click the **Save** button as you go to avoid losing any work.



## Project Workplan

Program Achievements

Objective: 1

Task:

1.1

Performance Measure:

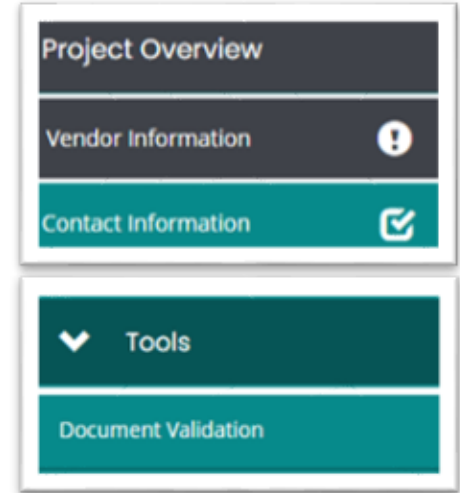
1.1.1

Please provide a brief, highlevel narrative assessment of your progress in achieving this objective as of the close of this reporting period.

During the current reporting period -

# PROGRESS REPORT VALIDATION

- Two methods are available to prospective grantees to identify errors that must be resolved before the progress report can be submitted.
- **Navigation Bar** – The **Form** button icons will display as a Checkbox next to each successfully completed item. If the Form Button appears as an Exclamation Point, issues must be addressed before the application can be submitted.
- **Document Validation Tool** - Available under Tools on the Navigation Bar. This form provides a single listing of all issues across the application.



The image shows a window titled 'Document Validation' with a close button (X) in the top right corner. Below the title bar is a table with the following data:

Form Name	Status	May Prevent Status Change
Vendor Information	Error(s)	Yes

# SUBMITTING A PROGRESS REPORT

After reviewing your progress report to verify there are no system errors that will prevent submission, scroll down to the **Status Options** section of the **Navigation Bar** and click **Submit** followed by the OK button (not shown).

The Document Landing Page displays the updated status, indicating that the progress report is with the GM for review.

The screenshot displays the 'Document Landing Page' interface. At the top right, there is a 'Status Options' dropdown menu with a 'SUBMIT' button. The main content area is titled 'Document Landing Page' and includes an 'Instructions' section with a link to 'View document details.' Below this, a table lists document details:

<b>Template</b> Progress Report	<b>Instance</b> Progress Report Quarter 1
<b>Document Name</b> PR-2024-Joe's Nonprofit-00069	<b>Document Status</b> Progress Report Submitted for Review
<b>Organization</b> Joe's Nonprofit	<b>Your Role</b> Grantee Official

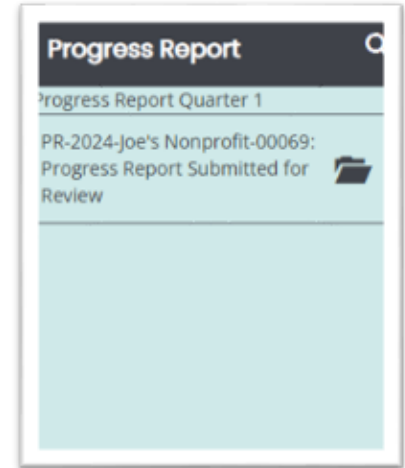
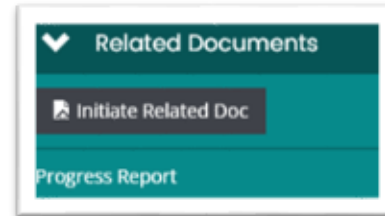
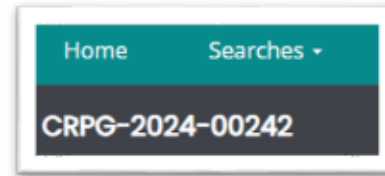
At the bottom, a progress bar shows two stages: 'Progress Report in Process' (marked with a green checkmark) and 'Progress Report Submitted for Review' (marked with a blue checkmark).

# VIEWING PREVIOUS REPORTS

While your organization can always access progress reports via the Search function described earlier in this presentation, reports can also be accessed directly from the agreement.

- Scroll down the agreement Navigation Bar to the **Related Documents** section.
- Click the **Progress Report** link. A folder listing all reports initiated to date and their status opens.
- Click on the Progress Report ID to open the progress report itself.

Note - To return to the agreement, simply reverse the process. Scroll to the bottom of the progress report's Navigation Bar and click the Application link.

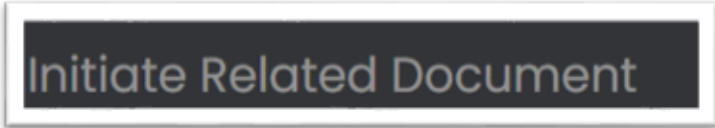


# CONCURRENT REPORTING

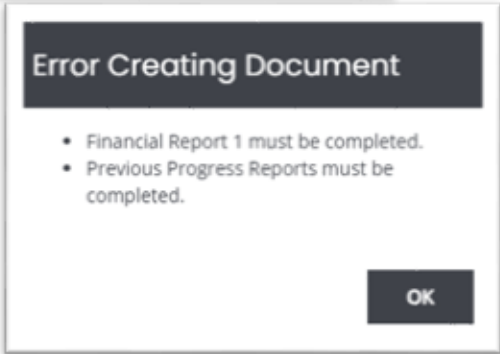
As previously noted, eGrants reporting is organized by periods. Each of the 7 periods that comprise your organization's 2-year contract has an associated progress and financial report.

These reports must be initiated, completed, submitted, and approved in order. The following rules summarize system edits in place to ensure reporting is timely.

- Q1 Progress Report must be initiated before the corresponding Financial Report can be initiated.
- Q1 Progress Report Must be approved before the corresponding Financial Report can be submitted.
- Q1 Progress and Financial Reports must be approved before the Q2 Progress Report can be initiated.



Initiate Related Document



Error Creating Document

- Financial Report 1 must be completed.
- Previous Progress Reports must be completed.

OK

# SUPPORT AND ASSISTANCE

- Application
  - All OCM eGrants system questions should be directed to ITS Grants Management at [grantsmanagement@its.ny.gov](mailto:grantsmanagement@its.ny.gov). Include “OCM eGrants Application” in the subject line.
- Prequalification
  - All questions regarding Prequalification should be sent to the SFS Helpdesk at [helpdesk@sfs.ny.gov](mailto:helpdesk@sfs.ny.gov) or call 518-457-7717.



# Office of Cannabis Management