

## Financial Reports – Tip Sheet

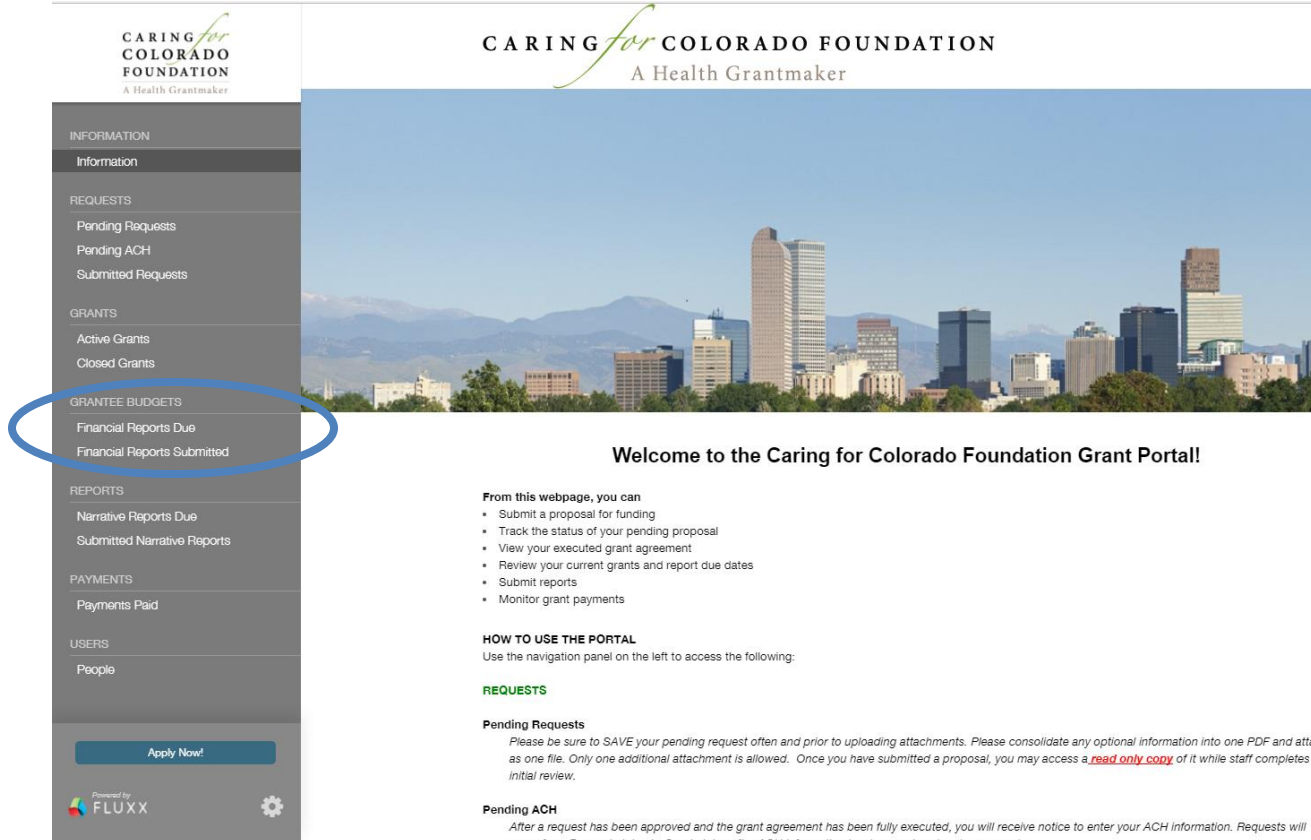
Caring for Colorado Foundation generally requires grantees to submit progress and final reports. There are a few instances where only a final report is required. Progress and Final Reports have two steps.

1. Financial Report
2. Narrative Report

To complete both parts of the report, log into the Caring for Colorado online grants management system at <https://caringforcolorado.fluxx.io>. Be sure to use Google Chrome as your internet browser.

### Progress Report – Financial

Under Grantee Budgets, click on “Financial Reports Due.”



**CARING for COLORADO FOUNDATION**  
A Health Grantmaker

**GRANTEE BUDGETS**

- Financial Reports Due
- Financial Reports Submitted

**WELCOME TO THE CARING FOR COLORADO FOUNDATION GRANT PORTAL!**

**From this webpage, you can**

- Submit a proposal for funding
- Track the status of your pending proposal
- View your executed grant agreement
- Review your current grants and report due dates
- Submit reports
- Monitor grant payments

**HOW TO USE THE PORTAL**  
Use the navigation panel on the left to access the following:

**REQUESTS**

**Pending Requests**  
Please be sure to **SAVE** your pending request often and prior to uploading attachments. Please consolidate any optional information into one PDF and attach as one file. Only one additional attachment is allowed. Once you have submitted a proposal, you may access a **read only copy** of it while staff completes an initial review.

**Pending ACH**  
After a request has been approved and the grant agreement has been fully executed, you will receive notice to enter your ACH information. Requests will move from Request status to Grant status after ACH information has been entered and processed.

Click on the report labeled "Progress Financial Report" for the correct grant ID in the middle column. Then click "Edit" in the top right corner.

**CARING for COLORADO FOUNDATION**  
A Health Grantmaker

Search...  
Jeffersonian  
G-5704-18 | Test Grant | 1/19/2018 | Progress Financial Report

**CFC Approved Budget**

**Caring for Colorado requires both a financial report and narrative report - these reports must be completed in two steps.**

**Step 1 - Financial Report**

**Instructions:** Below is the CFC approved budget for your grant, which you need to complete the financial report.

1. Please click **"Edit"** in the top right corner to open the form, enter your expenditures to date and click **"Save"** in the bottom right corner.
2. Carefully review your entries and click the **"Submit"** button in the bottom right corner. Once submitted, expenditures cannot be not be updated.

**Step 2 - Narrative Report**

After completing this financial report, go to the narrative report by clicking **"Narrative Reports Due"** under **"Reports"** in the left hand column.

**Thank You!**

Status: Progress Financial Report

**Organization Name:** Jeffersonian  
**Grant ID:** G-5704-18  
**Program Officer:**  
**Grant Period Starts:** 1/19/2018      **Grant Period Ends:** 7/18/2018  
**Total Grant Award:** \$10,000.00

**Request:** G-5704-18  
**Name:** Jeffersonian  
**Start Date:** 1/19/2018

[Submit Progress Financial Report](#)

Apply Now!

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1 - 1 of 1

Enter the "As of Date" using the calendar. Enter your expenditures to date in the "Expenditures to Date" column. Please carefully review the entries and then, click "Save" in the bottom right corner. After you click save, you will need to click "Edit" again to make any changes.

**NOTE** - There is one more step to the Progress Financial Report!

Carefully review your entries before clicking submit.

### Progress Financial Report - Budget Versus Actual

As of Date: 03/31/2018

Budget Category	CFC Approved Budget	Expenditures to Date
Salaries	5,000.00	2500
Benefits and Taxes	1,500.00	750
Capital - Construction/Renovation	0.00	0
Capital-Equipment	0.00	0
Contracted Services	0.00	0
Evaluation	500.00	250
Meetings & Events	500.00	250
Occupancy	0.00	0
Professional Development	1,500.00	750
Program Supplies	500.00	250
Travel	500.00	250
Fiscal Sponsor Fee (if applicable)	0.00	0
Other	0.00	0
	0.00	0
	0.00	0

Grantee Comments - Progress Financial Report

Cancel AB Save

Click "Submit Progress Financial Report" at the bottom right corner. Be sure to click "OK" to the Note pop-up. You cannot make any changes to a submitted report. Now you're ready to complete your Progress Narrative Report.



## CFC Approved Budget

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### Step 2 - Narrative Report

After completing this financial report, go to the narrative report by clicking "**Narrative Reports Due**" under "**Reports**" in the left hand column.

Thank You!

Status

Progress Financial Report

Status: Progress Financial Report

Organization Name: Jeffersonian

Grant ID: G-5190-17

Program Officer: Jennifer Lobb

Grant Period Starts: 9/1/2017

Grant Period Ends:

8/31/2018

Total Grant Award: \$88,500.00

Request:

G-5190-17

Submit Progress Financial Report

# Final Report – Financial

Under Grantee Budgets, click on “Financial Reports Due.”

**CARING for COLORADO FOUNDATION**  
A Health Grantmaker

**CARING for COLORADO FOUNDATION**  
A Health Grantmaker

**INFORMATION**  
Information

**REQUESTS**  
Pending Requests  
Pending ACH  
Submitted Requests

**GRANTS**  
Active Grants  
Closed Grants

**GRANTEE BUDGETS**  
Financial Reports Due  
Financial Reports Submitted

**REPORTS**  
Narrative Reports Due  
Submitted Narrative Reports

**PAYMENTS**  
Payments Paid

**USERS**  
People

[Apply Now!](#)

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**Welcome to the Caring for Colorado Foundation Grant Portal!**

**From this webpage, you can**

- Submit a proposal for funding
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**Pending ACH**  
*After a request has been approved and the grant agreement has been fully executed, you will receive notice to enter your ACH information. Requests will move from Request status to Grant status after ACH information has been entered and processed.*

Click on the report labeled “Final Financial Report” for the correct grant ID in the middle column. Then click “Edit” in the top right corner.

**CARING for COLORADO FOUNDATION**  
A Health Grantmaker

Search...

Jeffersonian  
G-5704-18 | Test Grant | 1/19/2018 | Final Financial Report

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**Step 2 - Narrative Report**

After completing this financial report, go to the narrative report by clicking "**Narrative Reports Due**" under "**Reports**" in the left hand column.

**Thank You!**

Status: Final Financial Report

**Organization Name:** Jeffersonian  
**Grant ID:** G-5704-18  
**Program Officer:**  
**Grant Period Starts:** 1/19/2018      **Grant Period Ends:** 7/18/2018  
**Total Grant Award:** \$10,000.00

**Request:** G-5704-18  
**Name:** Jeffersonian  
**Start Date:** 1/19/2018

Apply Now!

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1 - 1 of 1

Submit Final Financial Report

Edit

Enter the "As of Date" using the calendar. Enter your **final expenditures** in the "Expenditures to Date" column. Please carefully review the entries and then click "Save" in the bottom right corner. After you click save, you will need to click "Edit" again to make changes.

Update Expenditures to Date to reflect final expenses

Carefully review your entries before clicking submit.

Progress Financial Report - Budget Versus Actual

As of Date:

Budget Category	CFC Approved Budget	Expenditures to Date
Salaries	5,000.00	2,500.00
Benefits and Taxes	1,500.00	750.00
Capital - Construction/Renovation	0.00	0.00
Capital-Equipment	0.00	0.00
Contracted Services	0.00	0.00
Evaluation	500.00	250.00
Meetings & Events	500.00	250.00
Occupancy	0.00	0.00
Professional Development	1,500.00	750.00
Program Supplies	500.00	250.00
Travel	500.00	250.00
Fiscal Sponsor Fee (if applicable)	0.00	0.00
Other	0.00	0.00
	0.00	0.00
	0.00	0.00


Grantee Comments - Progress Financial Report

Grantee Comments - Final Financial Report

Cancel  Save

**NOTE** - There is one more step to the Final Financial Report!

Click "Submit Final Financial Report" at the bottom right corner. Be sure to click "OK" to the Note pop-up. You will not be able to edit a submitted report. Now you're ready to complete your Final Narrative Report.

[Edit](#) 

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Status: Final Financial Report

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**Grant ID:** G-5704-18  
**Program Officer:**  
**Grant Period Starts:** 1/19/2018      **Grant Period Ends:** 7/18/2018  
**Total Grant Award:** \$10,000.00

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<b>Request:</b>	G-5704-18
<b>Name:</b>	Jeffersonian
<b>Start Date:</b>	1/19/2018
<b>End Date:</b>	7/18/2018
<b>Final Report Only:</b>	No

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Update Expenditures to Date to reflect final expenses

Carefully review your entries before clicking submit

[Submit Final Financial Report](#)