



How to Enter in Financial Reports:

1. You may find all pending deliverables including your financial reports by clicking on **Upcoming Deliverables** under **My Activities**. **PLEASE NOTE:** You will only be able to view deliverables associated to an Award if the **Principal Investigator** has added you as a contact to their award (For more information, see refer to “How to Add Contacts”)

The screenshot shows a user interface with a navigation bar at the top containing 'My Awards', 'My Applications', 'Funding Opportunities', 'External Requests', 'User Guide', and 'Privacy & Security'. Below the navigation bar, there are three main sections: 'My Awards', 'My Activities', and 'My Payments'. Each section contains summary cards for different categories.

2. The Upcoming Deliverables page lists all outstanding deliverables for a given award. To begin, click on either the Estimated Budget or the Report of Expenditures. **PLEASE NOTE:** The system will not allow you to enter in the Report of Expenditures if the Estimated Budget has not been submitted and approved or if our Program Administrator has requested changes to the Estimated Budget.

#	Award ID	Award Number	Deliverable	Deadline	Status	Award Period	Description
1	CC500	000192CC319	Report of Expenditures	09/24/2020	Pending	07/01/2019 - 06/30/2020	
2	CC500	002150319	Revised Budget	04/13/2021	Pending	05/01/2021 - 04/30/2022	
3	CC500	000192CC319	Award Letter	05/20/2021	Pending	07/01/2019 - 06/30/2020	
4	CC500	000192CC319	Estimated Budget	05/22/2021	Pending	07/01/2019 - 06/30/2020	
5	CC500	000192CC319	IRB Approval Letter	05/22/2021	Pending	-	



- On the Estimated Budget or Report of Expenditures page, click on **Begin Preparation** to “claim” the Financial Report. This will change the status of the Financial Report to “**In Progress**”.

My Awards My Applications Funding Opportunities External Requests User Guide Privacy & Security

1 of 4

000192CC319 - Report of Expenditures

Activity Type: Report of Expenditures

Status: Pending * Scheduled Date: 09/24/2020

* Activity Owner: Bruce Wayne

CFF Award Number:	CC500	Report Date:	04/22/2021
Center Number:	500	Principal Investigator:	Bruce Wayne
Program Number:	500	Institution Name:	CFF Hospital Foundation
Award Amount:	\$44,685.00	Budget Period:	From: 07/01/2019 To: 06/30/2020

Award Period Start: 07/01/2019

Award Period End: 06/30/2020

Budget Access

Budget and report of expenditure details can only be viewed by the Principal Investigator, CF Center Director [for care center grants] and Financial/Grants Officer. If any other contacts should have the ability to view and enter budget or report of expenditure details enter their name below and select them from the resulting list. If the contact does not appear they must first be added as a contact on the award. Multiple contacts can be selected.

Save My Work **Begin Preparation**



- 4. When the Estimated Budget or Report of Expenditures is “**In Progress**” status, you will be able to enter in the Budget Actuals (expenditures) by clicking on the **Enter Budget Actuals** button. You will also be able to view the budget by clicking on the **Print** button. Click **Continue** once the budget has been entered. **PLEASE NOTE:** Only the Principal Investigator and Financial Officers can enter in the Budget. If you are a contact that needs to enter in the budget, you must request **Budget Access** from the Principal Investigator (Refer to “How to Grant Budget Access”).

000192CC319 - Report of Expenditures

Activity Type: Report of Expenditures
Status: In Progress
* Activity Owner: Bruce Wayne
* Scheduled Date: 09/24/2020

CFF Award Number:	CC500	Report Date:	04/22/2021
Center Number:	500	Principal Investigator:	Bruce Wayne
Program Number:	500	Institution Name:	CFF Hospital Foundation
Award Amount:	\$44,685.00	Budget Period:	From: 07/01/2019 To: 06/30/2020

Award Period Start: 07/01/2019
Award Period End: 06/30/2020

Budget Actuals: [Enter Budget Actuals](#)
Budget PDF: [Print](#)
Budget Actuals PDF: [Print](#)

Balance: \$38,052.50
Prepared By: Bruce Wayne

Budget Access

Budget and report of expenditure details can only be viewed by the Principal Investigator, CF Center Director [for care center grants] and Financial/Grants Officer. If any other contacts should have the ability to view and enter budget or report of expenditure details enter their name below and select them from the resulting list. If the contact does not appear they must first be added as a contact on the award. Multiple contacts can be selected.

Search and select

[Save My Work](#) [Continue](#)



- 5. **Report of Expenditures Only:** If there is a balance remaining, you must select an option for the remaining balance (Carry-Over, Refund Check, Payment/Award Reduction). Once all information has been entered click on the **Submit** button. PLEASE NOTE: If the Carry-Over option is selected, the system will request a justification for the Carry-Over amount.

000192CC319 - Report of Expenditures

Activity Type: Report of Expenditures
Status: In Progress
Activity Owner: Bruce Wayne
Scheduled Date: 09/24/2020

CFF Award Number:	CC500	Report Date:	04/22/2021
Center Number:	500	Principal Investigator:	Bruce Wayne
Program Number:	500	Institution Name:	CFF Hospital Foundation
Award Amount:	\$44,685.00	Budget Period:	From: 07/01/2019 To: 06/30/2020

Award Period Start: 07/01/2019
Award Period End: 06/30/2020
Budget PDF: [Print](#)
Budget Actuals PDF: [Print](#)
Balance: \$10,000.00
Prepared By: Bruce Wayne

Budget Access

Budget and report of expenditure details can only be viewed by the Principal Investigator, CF Center Director (for core center grants) and Financial/Grants Officer. If any other contacts should have the ability to view and enter budget or report of expenditure details enter their name below and select them from the resulting list. If the contact does not appear they must first be added as a contact on the award. Multiple contacts can be selected.

Clark Kent

* If balance remaining, select one
 Carry-Over Refund Check Payments/Award Reduction

CF Center Request for Carry-Over

Period Carried From: 07/01/2019 to 06/30/2020
Period Carried To: 07/01/2020 to 06/30/2021
Carry Over Balance: \$10,000.00
Carry Over Amount Requested: \$10,000.00

* Reason for un-expended funds
Enter Reason for Carry Over Here

* Proposed future use for un-expended funds
Enter Proposed future use for Carry Over Here

If the total Balance exceeds the Balance allowed for carry over, select one
 Refund Check Payment/Award Reduction

Financial Officer
Select the Financial Officer who is responsible for this project. If the correct contact is not listed use the Add Financial Officer button below to add the contact to the system.
Clark Kent
[Add Financial Officer](#)

[Save My Work](#) [Update Budget Actuals](#) [Submit](#)



- Once the Budget has been entered and submitted, the status of the Estimated Budget or Report of Expenditures will go to **“Pending PI Acceptance”**. The **Principal Investigator** must log in, click on **Upcoming Deliverables**, and select either the Estimated Budget or Report of Expenditures that has the status **“Pending PI Acceptance”**. On the Estimated Budget or Report of Expenditures page, the **Principal Investigator** can review the budget and make any edits. Once the Financial Report is complete, the **Principal Investigator** will submit the budget to the **Financial Officer** by clicking on the **Submit to Financial Of**

The screenshot displays the Cystic Fibrosis Foundation portal interface. At the top, there is a navigation bar with links for 'My Awards', 'My Applications', 'Funding Opportunities', 'External Requests', 'User Guide', and 'Privacy & Security'. Below this, a section titled 'Upcoming Deliverables' contains a table with the following data:

#	Award ID	Award Number	Deliverable	Deadline	Status	Award Period	Description
1	CC500	000192CC319	Report of Expenditures	09/24/2020	Pending PI Acceptance	07/01/2019 - 06/30/2020	
2	CC500	002150319	Revised Budget	04/13/2021	Pending	05/01/2021 - 04/30/2022	
3	CC500	000192CC319	Award Letter	05/20/2021	Pending	07/01/2019 - 06/30/2020	
4	CC500	000192CC319	IRB Approval Letter	05/22/2021	Pending	-	

Below the table, the 'Report of Expenditures' details for award 000192CC319 are shown. The 'Status' is 'Pending PI Acceptance' and the 'Scheduled Date' is '09/24/2020'. The 'Activity Owner' is 'Bruce Wayne'. A form contains the following information:

ICFF Award Number:	CC500	Report Date:	04/22/2021
Center Number:	500	Principal Investigator:	Bruce Wayne
Program Number:	300	Institution Name:	CF Hospital Foundation
Award Amount:	\$44,685.00	Budget Period:	From: 07/01/2019 To: 06/30/2020

Additional details include 'Award Period Start: 07/01/2019', 'Award Period End: 06/30/2020', 'Budget PDF: Print', 'Budget Actuals PDF: Print', 'Balance: \$10,000.00', and 'Prepared By: Bruce Wayne'. A 'Budget Access' section contains a note: 'Budget and report of expenditure details can only be viewed by the Principal Investigator, CF Center Director (for care center grants) and Financial/Grants Officer. If any other contacts should have the ability to view and enter budget or report of expenditure details enter their name below and select them from the resulting list. If the contact does not appear they must first be added as a contact on the award. Multiple contacts can be selected.' A dropdown menu shows 'Clark Kent'. Below this, there is a note: '* If balance remaining, select one' with radio buttons for 'Carry-Over', 'Refund Check', and 'Payment/Award Reduction'. At the bottom, there is a link for 'CF Center Request for Carry-Over' and a navigation bar with buttons for 'Save My Work' and 'Submit to Financial Officer'.



- The Estimated Budget or Report of Expenditures will now be in “**Pending Financial Officer Acceptance**” status. The **Financial Officer** will need to log in, click on **Upcoming Deliverables**, and select the Estimated Budget or Report of Expenditures that has the status “**Pending Financial Officer Acceptance**”. On the Estimated Budget or Report of Expenditures page, the **Financial Officer** may **Request Revisions** with comments – this will send the report back to **My Activities (Upcoming Deliverables)** or submit the report by clicking on the **Submit to CFF** button. **PLEASE NOTE:** Only the **Financial Officer** can submit the Financial Reports to CFF. When the status of the report moves from “**Submitted**” to “**Reviewed and Approved**” that means that the report has been reviewed and approved by the Program Administrator.

The screenshot displays the CFF system interface. At the top, there is a navigation bar with links for 'Institution Profile', 'My Awards', 'My Applications', 'User Guide', and 'Privacy & Security'. Below this is a table titled 'Upcoming Deliverables' with columns for 'Award ID', 'Award Number', 'Deliverable', 'Profile', 'Status', and 'Award Period'. The first row is highlighted with a blue box, showing 'Report of Expenditures' with a status of 'Pending Financial Officer Acceptance'. Below the table, the details for '000192CC319 - Report of Expenditures' are shown. The 'Status' is 'Pending Financial Officer Acceptance' and the 'Scheduled Date' is '09/24/2020'. The 'Activity Owner' is 'Bruce Wayne'. A table of metadata includes 'CFF Award Number: CC500', 'Center Number: 500', 'Program Number: 500', 'Award Amount: \$44,685.00', 'Report Date: 04/22/2021', 'Principal Investigator: Bruce Wayne', 'Institution Name: CFF Hospital Foundation', and 'Budget Period: From: 07/01/2019 To: 06/30/2020'. Below this, there are links for 'Budget PDF: Print', 'Budget Actuals PDF: Print', and 'Report of Expenditures Form: View / Save'. The 'Balance' is '\$10,000.00' and 'Prepared By: Bruce Wayne'. A section for 'Revisions Requested from Finance' contains a text area for 'Request Revisions Here'. At the bottom, there is a 'CF Center Request for Carry-Over' section and a navigation bar with buttons for 'Save My Work', 'Request Revisions', and 'Submit to CFF'. A blue arrow points to the 'Submit to CFF' button.