

Scheduling Non-Financial Reports in GMAS

The GMAS Non-Financial Report Scheduler allows grant managers to **schedule all non-financial reports** required for a sponsored research project. This GMAS feature allows grant managers to capture due dates and set email reminders decreasing the chance of late or forgotten reports. It is highly recommended that once grant managers receive an action memo for a new award that they review and determine which non-financial reports are required and enter them in the GMAS non-financial report scheduler.

NOTE: HART allows you to run a report of all the scheduled GMAS reports for your org or the funds you manage. This is a very helpful planning and organizational tool. The report titled “Scheduled Reports” can be found under the Grants Management dashboard in HART. The parameters can be changed in multiple ways to meet various needs. By default, the dashboard returns all Scheduled Reports due on or before the end of the current month. If you’d like to see reports due beyond the current month, extend the due date in the parameters.

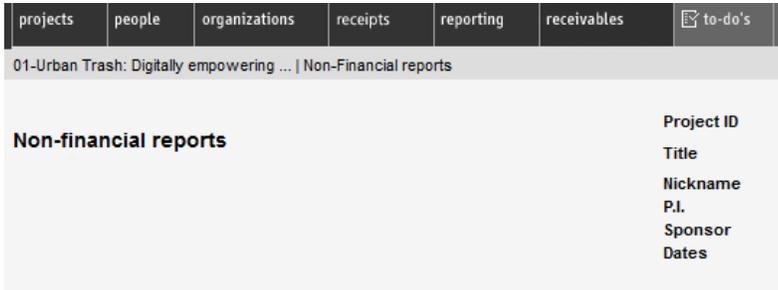
Here is an example of how to schedule a progress report in GMAS

1. From the segment homepage, select **<Non-financial reports>** from the left navigation menu.

Segment 1

Action memos	0	<p>Dates and dollars</p> <table border="1"> <tr> <td>Proposed dates</td> <td>Sep 17, 20</td> </tr> <tr> <td>Proposed total</td> <td>\$372,854</td> </tr> <tr> <td>Proposed direct</td> <td>\$372,854</td> </tr> <tr> <td>Proposed indirect</td> <td>\$0</td> </tr> </table> <p>Submitted requests</p> <p>Initial proposal - 6354296</p>	Proposed dates	Sep 17, 20	Proposed total	\$372,854	Proposed direct	\$372,854	Proposed indirect	\$0
Proposed dates	Sep 17, 20									
Proposed total	\$372,854									
Proposed direct	\$372,854									
Proposed indirect	\$0									
Requests	1									
Accounts	1									
Edit GL budgets										
Research team	2									
Subagreements	0									
Sponsor notices	0									
Approvals	3									
Financial deliverables	0									
Non-financial deliverables	0									
Receivables	0									
Transaction monitoring	0									

2. Select the **<Add report>** button



Below are all scheduled non-financial reports for this segment. To edit a report, select the Due date link for that report.
 Report list below indicates non-financial reporting requirements identified based on information entered in GMAS and may not include all Harvard University and Sponsor reporting requirements. It is the PI's responsibility to ensure that all appropriate reports are completed for their sponsored research projects.



There are no scheduled reports for this segment.

3. Select **<Progress report>** in the Form dropdown, and which role is responsible for initiating the progress report in the Preparer dropdown.
4. Enter the period covered by the progress report, and the due to sponsor date.
5. Select **<Edit frequency>** if you wish to generate more than one report. If you are editing the frequency, enter the ends on date as the end date for the last report you wish to generate and then pick a frequency.
6. Answer "Yes" to the "Send preparer a reminder" question if you want a reminder email sent, and identify the number of days prior to the due date the reminder should be sent to the individuals in the role on the segment you selected as preparer. Otherwise leave as "No".
7. Add comments and select "OK".
8. After the non-financial report has been submitted, mark the report as *completed* by filling out the "submission details" section. **PLEASE NOTE:** not marking them as completed will cause the award to appear in the Post-Award Metrics and prevent award closeout.

If you have any questions or suggested changes, please email contactgmas@harvard.edu.

Revision History

- 7/22/19 – Job aid created
- 10/22/20 – Clarified that not marking these reports as *completed* will cause these awards to show up in the Post-Award Metrics and prevent award closeout.