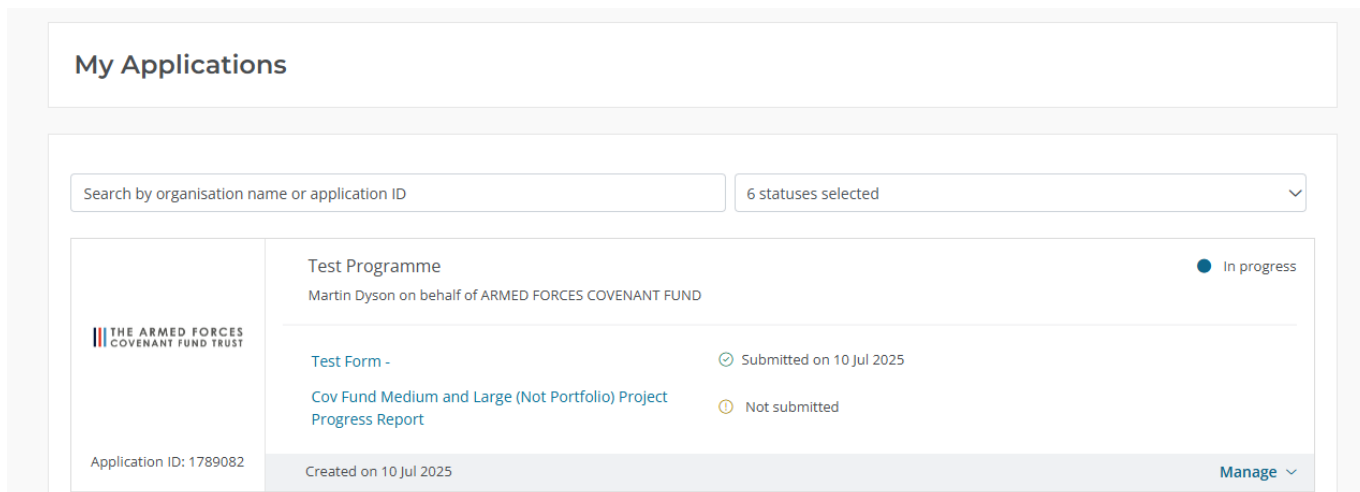# Guidance for completing grant reporting in the new portal

We will email you when a requirement has been published to your grant portal, confirming when it is due for submission. We will only publish the next report due, rather than all of them in one go.
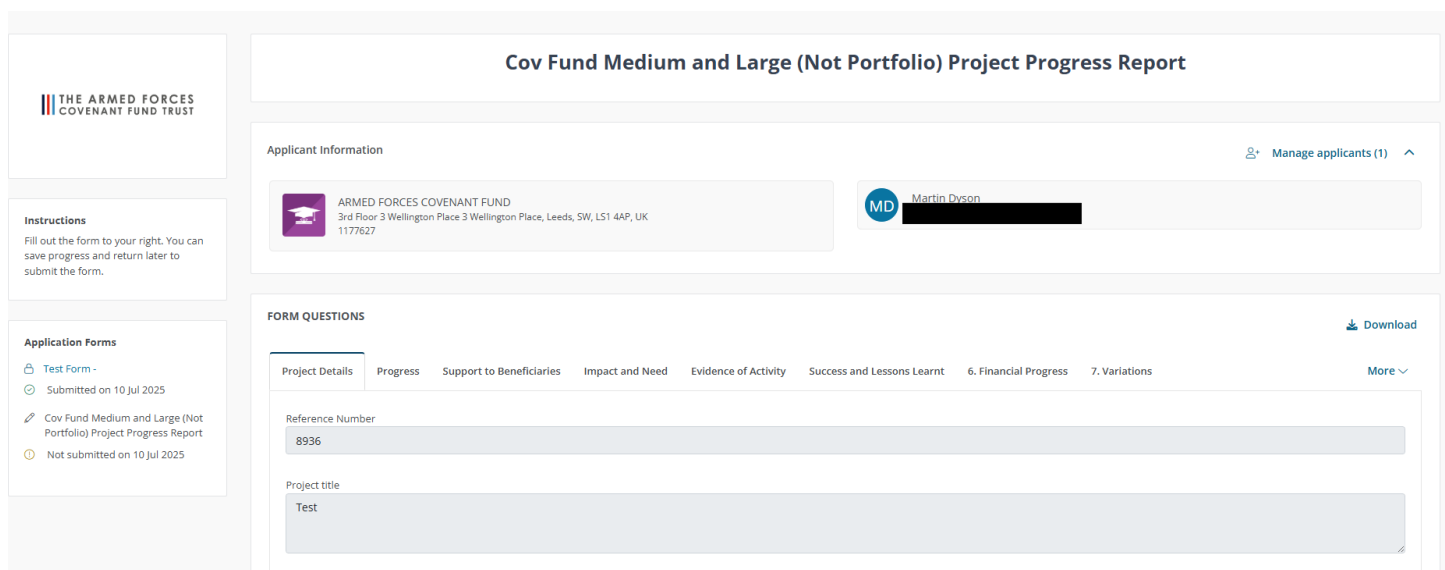
To complete your report, you'll need to log in to the new portal YourCause - Grants Portal

You grant reports will be displayed per grant programme. All documentation relating to that programme will be visible, as per the screenshot below.

If you're completing the same report type as one you've already submitted for the project, such as a progress update, or a snapshot report, the report will appear pre-populated with the previous information.
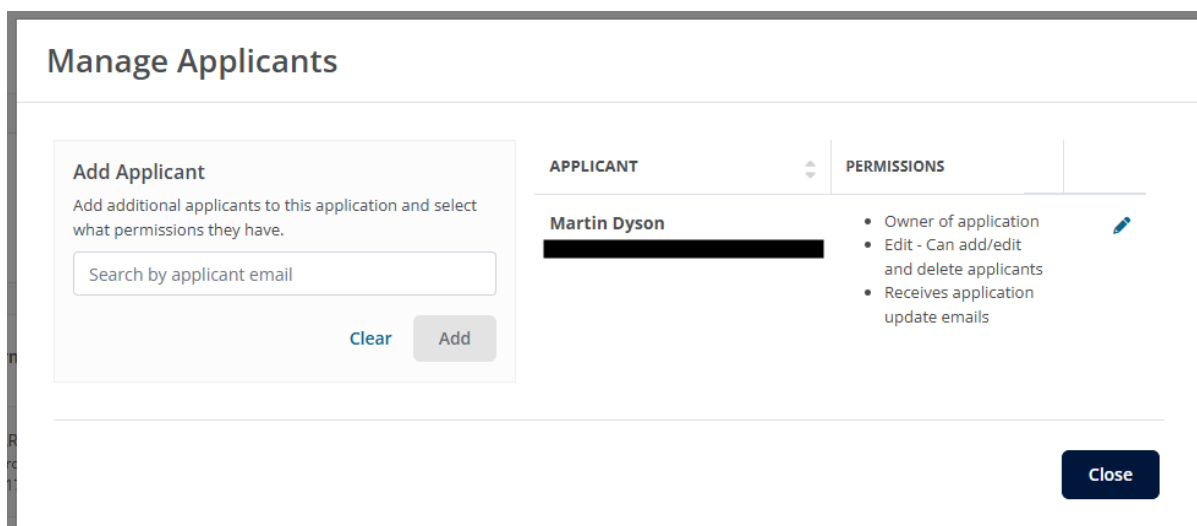
If you're completing a report for a grant project started under our old portal, you'll see the name "legacy" appearing in the grant programme title. If you hold multiple grants with us and aren't sure which form relates to which grant, when you open the form, you'll see the grant reference ID and project title at the top of the first page.

Advice and Tips

This new grant portal affords you more functionality than before. You now have the option to **download a PDF copy of the report form** (using the "Download" function on the righthand side of the screen). You may wish to use this to share it with anyone that needs to sign off the report before submitting.

You can also **collaborate on the reporting form with others**. To make use of the feature, within the "Applicant Information" box near the top of the screen, there's a link on the righthand side called "Manage applicants". Here you can set someone else up with access (NB they will need to set up an account first) and adjust the permissions they have to edit the form.

Troubleshooting

I've forgotten my password

If you're having trouble logging in, please use the "Need help signing in" link on the login page. That will link you to a troubleshooting page where you can find support.

I'm getting an error message come up on the reporting form

We recommend reviewing each section to ensure you've not missed any required fields, these will be easily identifiable as there will be a small red "!" next to the relevant report page, then, at the top of the page it will inform you what you need to fix before you can submit.

On the righthand side of the page there's a "More" button, click that and see if there are any report pages not displayed. If those are incomplete that may also flag up error messages or stop you from submitting it.

I'm seeing the same data/information that I submitted before, is that right?

This is a new feature in the system. If you're completing multiple progress or snapshot reports, it'll pull through the wording you previously submitted. You can either delete the wording altogether and write a new update, or you can simply update what's already there. Please remember to review the answers before submitting, to make sure they accurately reflect where you're up to with the delivery of your project.

I can't see the due date for my report.

This is a known issue and something we've escalated to our system providers. We'll email you shortly before the report is due, which will include the due date. We'll also send reminders shortly after the due date has passed. If in doubt at any point, please contact your respective grant lead, or refer to your Grant Agreement, which will include a reporting schedule in the Offer Letter.

If there is anything that would make your experience easier, please feed that back to us – info@covenantfund.org.uk whilst we can't make any promises that we can fix every issue, we will update our forms as we're able to, and we will feed any out of our control back to our system providers.