

Microsoft Excel Workbook

The new monthly reporting format/template:

- Contains specifically locked cells that auto-calculate.
- Is paginated.
- Includes tabs, checkboxes, textboxes, and reminders for ease of reporting on several requirements on a monthly, quarterly, semi-annual, and/or annual basis.
- Is to be saved as PDF and uploaded into the Enterprise Grants Management System (EGMS).

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MONTHLY PROGRESS REPORT

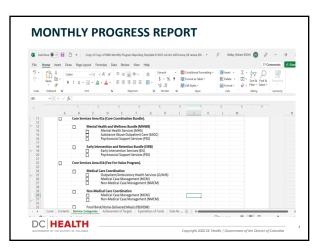
Microsoft Excel Workbook

The new format/template includes tabs, checkboxes, textboxes, and reminders for reporting on:

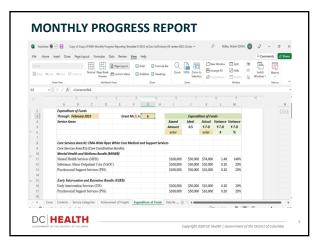
- Ryan White Part A-Funded Bundles/Services Categories.
- Achievement of Proposed/Negotiated Customer Targets.
- Year-to-Date Expenditures and Balances.
- Ryan White HIV/AIDS Program Services Report (RSR).
- Global Appraisal of Individual Needs-Short Screener (GAIN-SS).

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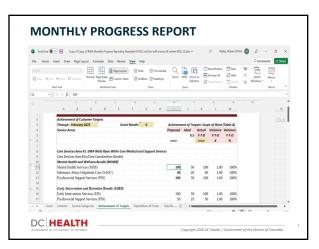
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The new format/template includes tabs, checkboxes, textboxes and reminders for reporting on:

- Successes/Accomplishments.
- Challenges/Barriers/Limitations.
- Contact listing and changes in Key Personnel and RWA funded positions.
- Personnel Schedule Amendments.

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Microsoft Excel Workbook

The new format/template includes tabs, checkboxes, textboxes, and reminders for reporting on:

- Status of Remediation Plans (RP) and Corrective Action Plans (CAP).
- Requests for Technical Assistance (TA).
- Other Relevant Information not included under any specific section.

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Microsoft Excel Workbook

Note: Personnel of Subrecipient Organizations (i.e., program and fiscal, data, quality) who are required to complete the monthly progress report shall collaborate internally within the organization and have familiarity with *MS Excel* spreadsheets, *Adobe Acrobat, CAREWare*, and the *Enterprise Grants Management System* (EGMS).

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MONTHLY PROGRESS REPORT

Microsoft Excel Workbook

Note: Although completion of the workbook requires monthly internal collaboration for subrecipient organizations (i.e., program and fiscal, data, quality), it was designed to conveniently capture and convey updated information for program and fiscal monitoring and may be used for program planning and revision; and used during monthly *check-in* discussions.

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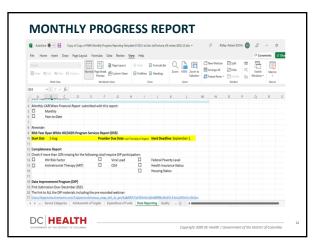
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Data Reporting

Note: Please continue to *run* the monthly and *Year-to-Date* CAREWare Financial Reports and upload in the EGMS with the monthly Progress Report. (There is no need to narrate the data counts in the textboxes of the MS Excel workbook).

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MONTHLY PROGRESS REPORT

Please forward questions in writing to your assigned Program Officer

Thank You! to the Tools Development Committee!

Robert Ridley IV Public Health Analyst/Program Officer Care and Treatment Division HIV/AIDS Hepatitis, STD & TB Administration (HAHSTA) District of Columbia Department of Health (DOH)

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