

## VITA GRANT REPORTING REQUIREMENTS

The Recipient is responsible for ensuring requests for information and/or documents are acted upon promptly and responded to by the requested date and to ensure all reports are timely and accurately filed throughout the grant period and until close out of the grant. The following information requests, reports and reporting dates apply to the VITA Grant.

Item	Description	Method	Frequency	Due
1	<b>Grant Notification</b> – In order to establish and fund the grant certain actions must be completed in a timely manner.	Due to IRS	Annually upon notification of grant award	Within 20 calendar days of grant notification
2	<b>Key Personnel Changes</b> – Notify your assigned grant officer when key program personnel change.	Due to IRS	Variable	Within 10 business days of change
3	<b>Cash Sub-Awards of \$1,000 or more Reporting</b> – See VITA Grant Program Terms and Conditions to determine applicability to your organization.	Due to IRS	Variable	Within 30 days of sub-award
4	<b>Related Party Transaction Reporting</b> – See VITA Grant Program Terms and Conditions to determine applicability to your organization.	Due to IRS	Variable	Within 30 days of transaction
5	<b>Site Establishment Report</b> – List of all sites planned to open (December 1) or opened under the grant (September 30). Update the VITA Target Audience worksheet in the VITA Grant Workbook submitted with your application. If no changes are required to previously submitted information, an email notifying the grant officer that there are no changes is sufficient.	Due to IRS	Before filing season and with final reporting	December 1 September 30
6	Federal Financial Report (FFR) <b>Cash Transaction Report</b> (Standard Form 425) - This report provides quarterly financial information. Reporting continues until all grant funds are withdrawn and reported.	File electronically in the Payment Management System (PMS)	Quarterly once funds are deposited in PMS account	January 30 April 30 July 30 October 30
7	<b>Matching Funds Documentation</b> – Due if sufficient matching was not already provided in the application.	Due to IRS	Annually	January 31
8	<b>Sub-award Reporting</b> – Applicability includes consideration of award amount, whether your organization sub-awards, and existing reporting of executive compensation. See 2 CFR Part 170, <a href="#">Appendix A</a> for full information.	Electronically filed at <a href="http://www.fsrs.gov">www.fsrs.gov</a> and <a href="http://www.SAM.gov">www.SAM.gov</a>	Upon sub-award of funds meeting described conditions	By the end of the month following the month during which you make the sub-award
9	<b>Minimum Returns Expected Questionnaire</b> – Reconciles returns completed and sites established per IRS data with the organization's data. A communication is generally sent in late April or early May.	Due to IRS	Annually	Within 10 calendar days of receipt of request for response
10	<b>Unused Funds Notification</b> – Provide IRS with confirmation that all funds awarded will be utilized; if not, provide amount that can be released.	Due to IRS	Annually	June 30
11	<b>Final Report</b> – This report covers the entire grant period. It includes a final program plan narrative, final budget detail explanation, and items 5, 12, and 13. Detailed instructions are provided in Publication 4883, Grant Programs Resource Guide.	Due to IRS	Annually 90 days after end of the grant period	September 30
12	Standard Form PPR-A, <b>Performance Measures</b> - Detailed instructions are provided in Publication 4883, Grant Programs Resource Guide.	Due to IRS	Annually 90 days after end of the grant period	September 30
13	FFR <b>Financial Status Report</b> – This covers the entire grant period and it is one component of final report.	File electronically in the PMS	Annually 90 days after end of the grant period	September 30

Information due to IRS must be submitted electronically (**unless otherwise directed**) to the grant analyst assigned responsibility for your grant. Due to size restrictions in our email system, the grant recipient is responsible for confirming the receipt of electronic messages with attachments.