



### **Why and When to Use the Copy Forward Function**

To facilitate the report submission process, the Copy Forward function has been added to FederalReporting.gov. The Copy Forward function allows recipients to copy existing reports from the previous reporting month to the current reporting month. The Copy Forward function reduces data entry time by pre-populating the current reporting month's information prior to submission. More importantly, the Copy Forward function creates an audit trail linking the current reporting month's report with the previous reporting month's report.

When the Copy Forward function is used to create a report, a link is established even if business keys have changed. The link enables Recovery.gov to track the quarterly progress of an award and decreases the likelihood of double counting an award. Recipients should always use the Copy Forward function when...

- A report for the same Award ID and same DUNS Number was filed in the previous reporting month and the current report is an update to the previous report; or
- The current report is an update to the previous report but the Award ID, DUNS Number and/or the Order Number have changed since the previous reporting month

Please note the differences between the Copy Function and the Copy Forward Function. Copy can only be performed when copying a report *from the current reporting month*. Copy Forward can only be performed when copying a report *from the previous reporting month*.



### **Why and When to Use the Copy Function**

To facilitate the report submission process, the Copy function has been added to FederalReporting.gov. The Copy function allows recipients to copy existing reports from the current reporting month. The Copy function reduces data entry time by pre-populating the current reporting month's information prior to submission. More importantly, the Copy function creates an audit trail linking the two reports from the current reporting month.

When the Copy function is used to create a report, a link is established even if business keys have changed. Recipients should use the Copy function when...

- An agency decides to issue multiple awards to the same recipient for the same initiative and the recipient wishes to link the two awards; or
- A centralized submitter wants to link related awards together (i.e. – Agency decides to issue same award to multiple recipients)

Please note the differences between the Copy Function and the Copy Forward Function. Copy can only be performed when copying a report *from the current reporting month*. Copy Forward can only be performed when copying a report *from the previous reporting month*.



## **How to Link Reports with Changed Business Keys if You are a Batch, XML or Excel Submitter**

To link a report from the previous reporting month to a report for the current reporting month, the report for the current reporting month must be created by copying forward the report from the previous reporting month. Since both the Change Business Key and the Copy Forward functionalities are only available through the online form, Batch, XML, and Excel submitters must establish report links – and change business key information if necessary – before submitting report files.

Batch, XML or Excel submitters should follow the steps below to link reports and change business key information. Please note that these steps are high-level instructions. For step-by-step instructions on Copy Forward and File Submission, please see the FederalReporting.gov User Guide at <https://www.federalreporting.gov/federalreporting/downloads.do>.

1. Log onto FederalReporting.gov
2. Navigate to the My Reports page
3. Search and open the previous reporting quarter report
4. Click on the “Copy Forward” button to copy the report’s information
5. The Copy Report Forward page has a Copy To section. This is where business key information can be changed. If necessary, enter the new Award Number, Order Number (for contracts) and/or DUNS number
6. Click on the “Confirm Copy” button to proceed
7. Since updates will enter the system via Batch, XML or Excel, it is not necessary to update the report details at this moment. Click the “Save as Draft” button.
8. Prepare the Batch, Excel or XML file for submission. The business key in the file should match the new business keys entered in Step 5.
9. Submit the Batch, Excel or XML file.



## **How to Use Copy Forward and Copy for Online Reporters**

### **Copy Forward**

1. Click on My Reports – Prime Recipient (or Sub Recipient) link to search for a report
2. Set the Calendar Year and Calendar Month to the previous reporting month and search for the report to be copied. Only reports from the previous reporting month can be copied with the Copy Forward function
3. Once the report is opened, click on the “Copy Forward” button to copy the report to the current quarter. Read the pop-up warning message and click on OK to proceed
4. The Copy Report Forward page is displayed. While on this page, user has the option to change the award number, prime DUNS, Order Number (for Federally Awarded Contracts) and to include Sub Recipient Reports. This is the only page where report keys can be changed prior to copying. Click on “Confirm Copy Forward” button to proceed
5. Depending on the user and award type, the system displays either a Sub Recipient report or Prime Recipient report with conditional Sub Recipient and/or Vendor tabs. For example, if a Prime Recipient grant report is copied forward, then the user will see the Prime Recipient, Sub Recipient, and the Vendor tabs. If a Sub Recipient grant report is copied forward, then the user will see the Sub Recipient and Vendor tabs.
6. The user has the option to modify non-business key information before saving or submitting the report. This includes recipient and award information, sub recipient information, or vendor information. To save the report, click the “Save as Draft” button. To submit the report, click the “Submit” button.
7. If the user decides to submit the report, the system will display the Confirm Initial Submission page. To complete the submission, enter the FRPIN for the DUNS and click on Submit

### **Copy**

1. Click on My Reports – Prime Recipient (or Sub Recipient) link to search for a report
2. Set the Calendar Year, Quarter to the current reporting quarter and search for the report to be copied. Only reports from the current quarter can be copied with the Copy function
3. Once the report is opened, click on the “Copy” button to copy the report. Read the pop-up warning message and click the “OK” button to proceed
4. The Copy Report page is displayed. While on this page, user has the option to change the award number, prime DUNS, Order Number (for Federally Awarded Contracts) and to include Sub Recipient Reports. Since the business keys must be unique, the user must change at least one of the key fields before proceeding. Click the “Confirm Copy” button to proceed
5. Depending on the user and award type, the system displays either a Sub Recipient report or Prime Recipient report with conditional Sub Recipient and/or Vendor tabs. For example, if a Prime Recipient grant report is copied forward, then the user will see the Prime Recipient, Sub Recipient, and the Vendor tabs. If a Sub Recipient grant report is copied forward, then the user will see the Sub Recipient and Vendor tabs.
6. The user has the option to modify non-business key information before saving or submitting the report. This includes recipient and award information, sub recipient



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- information, or vendor information. To save the report, click the "Save as Draft" button. To submit the report, click the "Submit" button.
7. If the user decides to submit the report, the system will display the Confirm Initial Submission page. To complete the submission, enter the FRPIN for the DUNS and click on Submit

For detailed step-by-step instructions on Copy and Copy Forward, please see the FederalReporting.gov User Guide at

<https://www.federalreporting.gov/federalreporting/downloads.do>.