



OKLAHOMA

OCAST»

Progress Report Submission Guide

For Principal Investigators
(Authorized Official role in OGX)

Version: 2020-11-20

Oklahoma Center for the Advancement of Science and Technology

About this guide

Purpose of this guide

The Progress Report Submission Guide for Principal Investigators contains information about uploading progress reports on the Oklahoma Grant Exchange – OGX website. Progress report formatting instructions are found on the Progress Report Page in OGX (see step 6 in “Upload progress report” section in this guide).

Users of this guide

Principal Investigators of OCAST projects (Authorized Official role in OGX)

Types of progress report submissions and deadlines

Progress report deadlines are provided in the current year project contract, unless otherwise provided as a result of a contract modification altering the contract end date. Progress report deadlines are strictly enforced; failure to submit progress reports by the deadline may result in project termination, deobligation of remaining funds, and ineligibility for future OCAST funding opportunities.

There are three types of progress reports:

- Annual progress reports
Submitted 60 days prior to the end of each year of your project, except for the last year
 - Final progress reports
Submitted 30 days after the end of the final year of your project
 - Interim progress reports
Submitted as part of a contract modification request, or for mid-year updates when required
-

Please help us improve OGX with your feedback by completing our [OGX Feedback Survey](#)

Login to your OGX account

To access the OGX system, go to <https://www.ogx.ok.gov>. Enter your username and password associated with your Authorized Official role and then click the **SUBMIT** button.



NOTE: If you have an existing user account in OKGrants, then you may login to OGX using your OKGrants User Name and Password. Upon login you may be asked to change your password; you may use the same password without issue. Be aware that the OGX portal does not save your User Name and Password. However, this option may be available for some browsers.



IMPORTANT: Only the Principal Investigator (Authorized Official role) may initiate and submit a progress report.



OKLAHOMA GRANT EXCHANGE - OGX

Welcome to the Oklahoma Grant Exchange - OGX

Within this system, you are able to search for grant opportunities, track your project status and submit requests for payment. This system requires an initial registration process.

- The Agency Administrator (AA) must complete the initial registration process for the organization by selecting the Agency Administrator Registration button. Only the Agency Administrator should complete the registration page. *Examples of an agency administrator are Executive Director, Grants Manager, Program Director, Mayor, Research Administrator or CEO.*
- **For existing OKGrants users** - Your OKGrants username and password will be active in this system. If you need further assistance, please see your agency's point of contact below.

Mike Bray, Oklahoma Highway Safety Office (OHSO), 405-323-2274, [Email](#)
Connor Cox, Oklahoma Center for the Advancement of Science and Technology (OCAST), 405-319-8428, [Email](#)

Announcements

Login

Username

Password

Submit

[Forgot Username/Password?](#)

[Agency Administrator Registration](#)



NOTE: If you do not remember your password, click the **Forgot Username/Password?** link and follow the instructions to have a new temporary password sent to you by the OGX system. If you are copying and pasting the temporary password from the OGX system email to the OGX site, please make sure that you are not copying an extra space when pasting the temporary password or else you will see an error message. If necessary, type enter the temporary password manually. Upon login, enter your new password in your profile page and save.

If you have attempted multiple login attempts and have been locked out of the system, please contact OCAST for assistance.

Upload your progress report

1. From the Home page “Dashboard,” confirm that you are logged in as an Authorized Official (PI) and
2. Click the **Initiate Related Document** button.

OKLAHOMA GRANT EXCHANGE - OGX

Home Searches

Dashboard

Use the below panels to work with your Grants and Funding Opportunities.

My Tasks

Filter

My Tasks

Name	Document Type	Organization	Status	Status Date	Due
AR20-009	OCAST Application	OCAST IGX Test Organization	Application In Process	9/4/2020 11:36:39 AM	
AR20-010	OCAST Application	OCAST IGX Test	Application In Process	9/4/2020 1:00:29 PM	

My Opportunities

Name	Provider	Availability	Short Description
FY19.1 Intern	Oklahoma Center for the Advancement of Science and Technology	8/6/2018 12:00:00 AM - 2/28/2021 11:59:00 PM	
		1:30:00 PM	
		1:30:00	
		2:00:00 PM	
		12:00:00	
	Science and Technology	PM	

Announcements

3. Enter your Project Number in the **Document Identifier** field. The resulting **Parent Document** field should match, and the **Available Documents** field will show the associated Progress Report available.

4. Click the **Create** button.

Initiate Related Document

Select a parent document and available related document. Use the Create document.

Document Identifier

HR20-009

Parent Document

HR20-009

Available Documents

OCAST HR Progress Report

Create

5. A Progress Report document is created and you will see its Document Landing Page. It is within this document that you will upload your progress report. In the navigation pane on the left, Click on **Progress Report**.

OKLAHOMA OKLAHOMA GRANT EXCHANGE - OGX

Home Searches Authorized Official IGX

PR-HR20-009.25

Document Landing Page

View document details.

OCAST HR Progress Report 2017	OCAST HR Progress Report	OCAST Progress Report
PR-HR20-009.25		
Organization	Your Role Authorized Official	Due Date 12/31/2020 12:00:00 PM
OCAST HR Progress Report Organization		

5. Click on **Progress Report** in the Navigation Pane

6. In the Progress Report page, select the current year **Contract Number** from the dropdown list, select the **Progress Report Type** (Annual, Final, or Interim) and click the **Select** button to upload your progress report file.

NOTE: Progress report formatting guidelines are found on this page.

7. Click the **SAVE** button. OGX will notify you if any page errors are found. All errors must be addressed before proceeding.

OKLAHOMA OKLAHOMA GRANT EXCHANGE - OGX

Home Searches Authorized Official IGX

PR-HR20-009.27

Progress Report

7. Click the **Save** button

Instructions: Select a contract number and report type, and upload a document into the first upload field. Then click Save at the top of the screen. Use the left navigation panel to change the status of the progress report to submit it to OCAST. **Your progress report has not been submitted to OCAST until the status is changed.**

If you are uploading additional information or a revised report at the request of OCAST, select a file in the second upload field and click Save. The original file and new file will be considered for review.

Principal Investigator: Laura Sohl-Smith

Contract Number:

Progress Report Type: * ☐ Annual ☐ Final ☐ Interim

Progress Report: *

Revised Progress Report: *

6. Select the **Contract Number, Progress Report Type**, and upload your **Progress Report** file

After saving, OGX will assign a unique, permanent document number to this progress report document; in this example, “PR-HR20-009-1.2” All progress report documents will have document numbers beginning with “PR-[...]” ”

8. In the navigation pane on the left, click on **Progress Report Submitted**.

OKLAHOMA **OKLAHOMA GRANT EXCHANGE - OGX**

Home Searches Authorized Official IGX

PR-HR20-009-1.2 New Note | Save Last Saved 10/20/2020 1:44 PM

Forms

Progress Reports

Progress Report

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Landing Page

Add/Edit People

Attachment Repository

Modification Summary

Status History

Notes

Print Document

Status Options

Progress Report Submitted

Progress Report Cancelled

Progress Report

Instructions: Select a contract number and report type, and upload a document into the first upload field. Then click Save at the top of the screen. Use the left navigation panel to change the status of the progress report to submit it to OCAST. **Your progress report has not been submitted to OCAST until the status is changed.**

If you are uploading additional information or a revised report at the request of OCAST, select a file in the second upload field and click Save. The original file and new file will be considered for review.

Principal Investigator: Laura Sohl-Smith Project Number: HR20-009

Contract Number:

Progress Report Type: ☒ Annual ☐ Final ☐ Interim

Progress Report:

Revised Progress Report:

Requirements: OCAST requires each principal investigator who is funded under the Health Research program to submit an annual progress report sixty (60) days prior to the ending date of each contract except for the final contract period. Each PI must submit a final report thirty (30) days after the end of the final contract period. Failure to submit the annual report as required may result in a gap in funding or loss of funds. Project Performance is evaluated by reviewers, a majority of whom reside outside Oklahoma, who are nominated and approved by the Health Research Committee. Any questionable progress report may be submitted to another reviewer for additional evaluation. Continued funding is contingent upon satisfactory annual performance evaluations and availability of funds.

9. Click **OK** to confirm the status change of the Progress Report document.

OKLAHOMA **OKLAHOMA GRANT EXCHANGE - OGX**

Home Searches Authorized Official IGX

PR-HR20-009-1.2 New Note | Save Last Saved 10/20/2020 1:44 PM

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Progress Report

Are you sure that you want to change the status from
Progress Report In Process to Progress Report Submitted?



10. Confirm that your progress report was successfully submitted by hovering the mouse pointer over the document number and

11. In the resulting info tip, confirm “**Status: Progress Report Submitted.**”

The screenshot displays the Oklahoma Grant Exchange (OGX) web application. The header includes the Oklahoma state logo and the text "OKLAHOMA GRANT EXCHANGE - OGX". A navigation bar at the top contains "Home" and "Searches". On the left, a sidebar menu lists "PR-HR20-009-1.2", "Template: OCAST HR Progress Report 2017", "Status: Progress Report Submitted", "Organization: OCAST IGX Test", "Your Role(s): Authorized Official", and "Due Date: 12/31/2020". A red box highlights the "Status: Progress Report Submitted" item, with a red arrow pointing to it from a callout box. The callout box contains the text: "10. Document number assigned to this progress report submission. Mouse over to see document summary." Another red box highlights the "Status: Progress Report Submitted" text in the sidebar, with a red arrow pointing to it from a second callout box. This second callout box contains the text: "11. Confirm status of progress report as submitted." The main content area shows a "Progress" section with instructions: "Instruction: Select a contract number and report type, and upload a document into the first upload field. Then click Save at the top of the screen. Use the left navigation panel to change the status of the report. The status will be changed." Below this, it says "If you are uploading additional files, they will be considered for review." At the bottom, it lists "Principal Investigator: Laura Sohl-Smith" and "Project Number: HR20-009".

Congratulations! Your progress report is now submitted.

One of the primary reviewers of your application will evaluate your progress report and complete an evaluation form in OGX. The evaluation process typically takes 2-3 weeks, and when completed you will receive a notification email from OGX.