

# Job Retention Reporting Screenshot Guide

## Indiana Office of Community and Rural Affairs

### 1. First fill out the [CDBG CV Economic Recovery Reporting Form](#)

**CDBG CV Economic Recovery Reporting Form:**  
Please read ALL instructions thoroughly before filling out your reporting form

\*\*\*DISCLAIMER: This sheet is only the INSTRUCTION SHEET - please go to the second tab at the bottom of the excel document to get to the "Community Form" to put in your info.\*\*\*

- 1) First go through **Column 1** and put in the name of business
- 2) Next, go through **Column 2** and fill out the employees initials for each **CURRENT** employee in the business (i.e. OC) - you can also use a code for each employee
- 3) Next, go to **Column 3** and mark whether the employee/position is still a LMI position or not - this will be collected the same way it was collected previously with the Economic Recovery Form or PFE Sheet.
- 4) Next, go to **Column 4** and please put "CLOSED" if the business has closed or "OPEN" if the business is still open
- 5) Next, go to **Column 5** and IF THE BUSINESS HAS CLOSED please provide explanation of WHY. (if the business is open you can keep that section blank)
- 6) Once you have completed this worksheet, please save the document (name it with identification for the community that it goes with please) and upload to the Indiana Grants Management System with your Job Retention Reporting report. Please [click here](#) for more information on how to access that report.

Business Name	Employee initials (i.e. OC)	LMI: 1 for YES, 0 for NO	Is the business open or closed?	If closed, please explain below:
Discwasher	OC	1	OPEN	
	AB		0	
	MW		0	
	JP		0	
Boutique	MJ		OPEN	
	MS			
	JP			
Fitness Center	PI			
	LM			
Midcenterprise	MJ (owner)		CLOSED	The business had severe weather destroy a facade on their building and between that and the impact from COVID-19 they were unable to keep the business running a profit to stay open.
	MS			
	OC			
Dear Stylist (Owns a booth in a salon)	BS		OPEN	
	MS			

Example Instruction Form Community Form

a. Please follow the instructions provided on the document step by step. Once that information is compiled, it is time to move onto uploading it to GMS and providing the overall information.

### 2. Upload the completed CDBG CV Economic Recovery Reporting Form to the [Grants Management System \(GMS\)](#)

Federal Employer ID #

Contact

Davis Bacon Indicator

Account Name

**Agreement Details**

Agreement Created Date

Agreement Executed Date

**Status and Dates**

Status

Cancelled

Application Approval Date

FEEPS Due Date

FRR Deadline

Are Extensions available?

Region

Follow Up Type

Follow Up Monitoring Address

PeopleSoft Contract #

Final Grant Agreement Link

Last Semi-Annual Received Date

Grant Award Date

Environmental Release Date

RFD Opening Date

**Grant Modifications (0)** New

**FEEPS (0)**

**Files (0)** Add Files

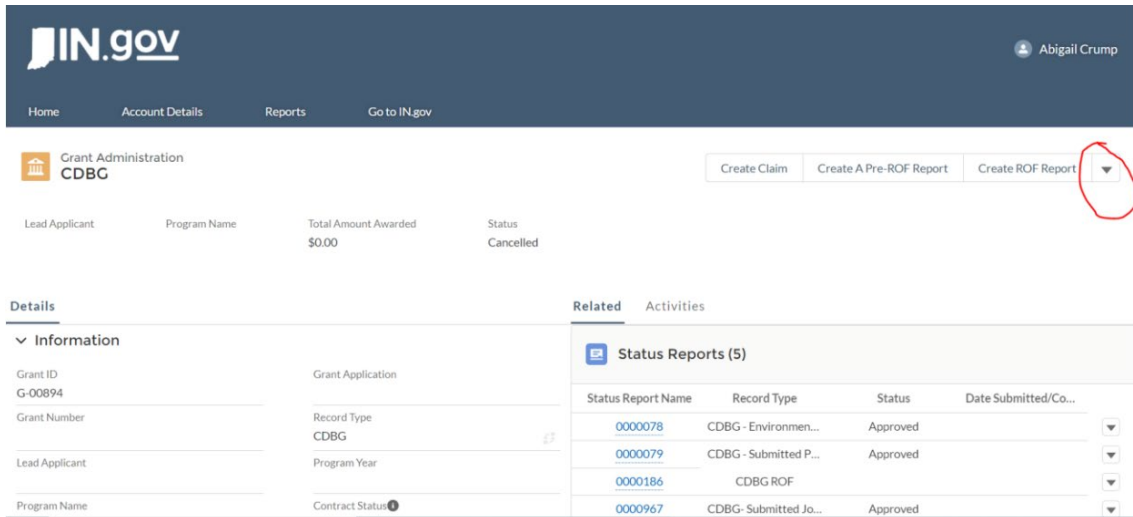
Or drop files

**Beneficiaries (0)**

**Audits (0)**

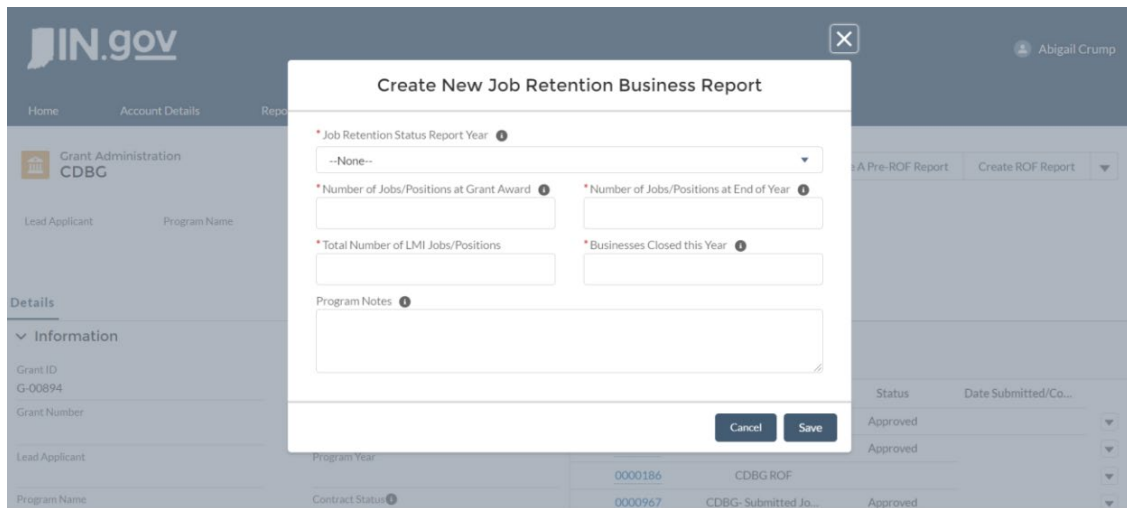
**Monitoring (Grant ID) (0)**

3. Then, you will want to “Create New Job Retention Business Report” on GMS.



- a. Click the down arrow at the top and at the bottom of the drop-down list you will see “Create Job Retention Business Report.” Click on that.

4. A box will open, fill out the required fields using information from your CDBG CV Economic Recovery Reporting Form.



- a. Refer to [walk-through video](#) if you have questions about the specific reporting fields.

5. Once the information is filled out, click save.

**Create New Job Retention Business Report**

\* Job Retention Status Report Year ⓘ  
--None--

\* Number of Jobs/Positions at Grant Award ⓘ

\* Number of Jobs/Positions at End of Year ⓘ

\* Total Number of LMI Jobs/Positions

\* Businesses Closed this Year ⓘ

Program Notes ⓘ

Cancel Save

6. Once the report is created and saved, locate the saved report under Status Report, click the corresponding report and on the upper right corner click submit for approval. **A notification will be sent to CDBG team member to review and approve report.**

**IN.gov** Erica Cline

Home My Grants Account Details Go to IN.gov

Status Report 0001126 Edit Printable View **Submit for Approval**

Details	Related
<p>Job Retention Status Report Year ⓘ 2021</p> <p>Number of Jobs/Positions at Grant Award ⓘ 87</p> <p>Total Number of LMI Jobs/Positions 95</p> <p>Program Notes ⓘ Report collected over a time period dating 3-15-21 to 4-27-21 for "Number of Jobs/Positions at the End of Year" total</p>	<p>Grant Administration <a href="#">G-01157</a></p> <p>Number of Jobs/Positions at End of Year ⓘ 106</p> <p>Businesses Closed this Year ⓘ 0</p> <p>Files (0) Add Files</p> <p>Upload Files Or drop files</p> <p>Approval History (0)</p> <p>Activity History (0) Send an Email</p>

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**Other Notes:**

- For grants this will be an annual report done for two years and for loans this will be done annually in perpetuity.
- Any questions about this reporting process can be directed to your [Community Liaison](#) or Pamela Guerrero ([pguerrero@ocra.in.gov](mailto:pguerrero@ocra.in.gov))