

Contents

Introduction.....	1
Pre-requisites.....	1
Non-Financial Deliverable Best Practices.....	1
Scheduling Non-Financial Deliverables	2
Viewing Non-Financial Deliverables	8
Submitting Non-Financial Deliverables.....	10
Deleting Non-Financial Deliverables.....	11
Using the HART Dashboard for Non-Financial Deliverable Tracking.....	12
Helpful Links	13
System Links	13
Documentation updates tracker.....	13

Introduction

This job aid provides an overview of the non-financial deliverable module in GMAS.

Pre-requisites

It is assumed that the reader understands the basic functionality and terminology of GMAS.

Non-Financial Deliverable Best Practices

1. Upon receipt of the first action memo awarding the segment, log into GMAS and schedule the non-financial deliverables due to the sponsor throughout the award's life. See the [Scheduling Non-Financial Deliverables](#) section below.

Benefit: Receive reminders of upcoming deliverables and be able to run the [GMAS Non-Financial Deliverables Report Dashboard](#) in HART to see upcoming and overdue deliverables. See the [Using the HART Dashboard for Non-Financial Deliverables](#) section below.

2. If there is an additional action memo related to a sponsor notice that changes the non-financial deliverable schedule, log into GMAS and update the schedule to reflect the new sponsor requirements. See the [Scheduling Non-Financial Deliverables](#) section below.

Benefit: Reminders will be sent based on the updated schedule, and the [GMAS Non-Financial Deliverables Report Dashboard](#) in HART will reflect the updated schedule.

3. When non-financial deliverables have been submitted, update the deliverable in GMAS with the submission date and upload the deliverable into the non-financial deliverable document repository. This will update the status of the deliverable to show its completion the deliverable will be easier to find in GMAS since it will live with the non-financial deliverable record. All non-financial documents will be visible in one view on the 'All documents' screen in the Non-financial deliverable documents panel.

Benefit: The benefit of doing this is to have a system of record of non-financial deliverables that were submitted to the sponsor and being able to utilize the HART [GMAS Non-Financial Deliverables Report Dashboard](#) for tracking.

4. Use the [GMAS Non-Financial Deliverables Report Dashboard](#) in HART to review non-financial deliverables that are coming due, overdue, and submitted across your entire portfolio.

Benefit: This dashboard reduces the need for additional shadow systems to monitor the upcoming non-financial deliverable schedule when the scheduling is done in GMAS. Since the dashboard also includes submitted deliverables, it can also be used to understand the scope of deliverables submitted in your portfolio/area. See [Using the HART Dashboard for Non-Financial Deliverables](#) section below.

Scheduling Non-Financial Deliverables

Scheduling non-financial reports can be done from the “Create non-financial deliverables” button on the non-financials list screen, which is accessed from the “Non-financial deliverables” left navigation menu item on the Segment homepage.

Non-financial deliverables



Financial deliverables list

From the Create non-financial deliverables screen, enter the parameters for the report details and schedule.

Create deliverables

Scheduled parameters

The screenshot shows the 'Scheduled parameters' form with the following fields and callouts:

- 1** Report type: Equipment Report
- 2** Preparer: Principal Investigator
- Principal Investigator: John Smith
- 3** Instructions: any notes or instructions can go here... etc (Optional)
- 4** Period from: MM/DD/YYYY to MM/DD/YYYY
- Schedule: Single occurrence, Repeat occurrence
- Frequency: Daily, Every [] days
- 5** Date first report due to sponsor: MM/DD/YYYY

Deliverable reminders

- 6** Send preparer a reminder? No, Yes 30 Day(s) before the due date
- 7** Add additional recipients to reminder? No, Yes
- Select role: Central Administrator, All
- Department Administrator, All
- + Add
- 8** Add to schedule preview, Clear scheduled parameters

1. The report type field includes the list of reports available to schedule. Selecting “Other Non-Financial” will prompt entry of the “Other type description” that will display on the individual report screen. NIH RPPR reports have different report parameter prompts than the rest of the report types.

Scheduled parameters

The close-up shows the 'Report type' dropdown menu with 'Other Non-Financial' selected. Below it, a blue arrow points to the 'Other type description' text input field.

2. The preparer field is a dropdown menu that includes roles that can be identified as the report’s preparer. Once the appropriate role is selected, an additional field will appear below preparer to identify the person in the role selected as preparer. If Principal Investigator is selected, the individual in that role will appear and cannot be updated. If any other role is selected, a dropdown menu will appear, defaulting to “All,” indicating that all members on the administrative team in that

Non-Financial Deliverables Job Aid

Grants Management Application Suite (GMAS)

role are responsible for preparing the report. An individual from that role can be selected from the dropdown menu.

Note: If a role is selected that does not have a person listed on the administrative team no one will be notified. It is important to only select a role that has active assignments.

Create deliverables

Scheduled parameters

Report type: Equipment Report

Preparer: Department Administrator

Select Department Administrator: All (Optional)

Instructions: All (Optional)

Period from: Bowen (YY)

Schedule: Leighton (Repeat occurrence)

Frequency: Daily (Every days)

Date first report due to sponsor: MM/DD/YYYY

Deliverable reminders

Send preparer a reminder? No Yes 30 Day(s) before the due date

Add additional recipients to reminder? No Yes

- Instructions can be added to the reports to call out anything the preparer should be aware of while they are preparing or submitting the report.
- Enter the period the first report will cover, and then select the whether the report occurrence being scheduled is a Single occurrence or a Repeat occurrence (daily, monthly, quarterly, semi-annual, yearly).

Scheduled parameters

Report type

Preparer

Principal Investigator: John Smith

Instructions Optional

Period from to

Schedule Single occurrence
 Repeat occurrence

Frequency

Date first report due to sponsor

5. If a single occurrence is selected, enter the due date. For repeat occurrences, enter the due date for the first report.
6. Send preparer a reminder/Automatically draft a Continuation request:
If the report type **is not "NIH RPPR"**, you can choose to send the preparer a reminder by selecting "Yes" and entering how many days before the due date they should get a reminder.
If the report type **is "NIH RPPR"**, you can choose to automatically create a Continuation request and send a reminder the number of days prior to the due

date.

Scheduled parameters

Report type

Preparer

Automatically draft a continuation request? No Yes

Instructions Optional

Period from to

Schedule Single occurrence Repeat occurrence

Deliverable reminders

Create a continuation request and send preparer a reminder Day(s) before the due date

Add additional recipients to reminder? No Yes

[Add to schedule preview](#) [Clear scheduled parameters](#)

- GMAS will only draft the continuation request if the segment is Active and the research team is confirmed on the date the draft was scheduled to be created. This follows the same rule restrictions as creating a continuation request manually.
 - On the day of the reminder, if both conditions are met, a notification reminder will be sent to the preparer and any additional recipients with a reminder about completing the NIH Annual RPPR report and a link to the continuation request shell.
 - The continuation request should be prepared and locked and routed as usual. When the continuation request has been submitted, GMAS will mark the “NIH RPPR” report as submitted with the same submission information as the continuation request.
7. Up to five additional recipient roles of the reminder can be added to the reports scheduled. When Yes is selected for the “Add additional recipient” question, a role dropdown field will be added to identify what role from the standing team should be added to receive the reminder. A second dropdown will be added to identify which individuals in that role on the project administrative team should receive the reminder.

Non-Financial Deliverables Job Aid

Grants Management Application Suite (GMAS)

Deliverable reminders

Send preparer a reminder? No
 Yes Day(s) before the due date

Add additional recipients to reminder? No Yes

Select role	Central Administrator	All
	Department Administrator	Bowen Higgins
	Mentor	Craig Smith
	Fellow Investigator	Aileen Fontana, Frank Foster
	OTD/OTL Signatory	Sierra Nevada

[Add to schedule preview](#) [Clear scheduled parameters](#)

- Once all parameters are filled out, select “Add to schedule preview” to review the schedule. Alternatively, selecting “Clear scheduled parameters” will clear all previously entered information. Scheduled non-financial deliverables will be displayed in the preview at the bottom of the page, where they can be reviewed, updated, or deleted if necessary. Selecting “Done” saves the reports with a “Scheduled” status.

Schedule non-financial deliverables preview

Equipment Report

From To

Preparer instructions

Due

Additional recipients: Department Administrator: Bowen
Equipment Administrator: Saige
Mentor: Craig

[Cancel](#) [Done](#)

Viewing Non-Financial Deliverables

To see details of an individual report, from the non-financial deliverables list screen, click the due date hyperlink.

Non-financial deliverables [Related links](#) [Info](#) [Create non-financial deliverables](#) [Settings](#)


Financial deliverables list
[Open all](#) [Close all](#)

Due date	Type	Period	Preparer	Status	Comments
Jul 1, 2025	NIH RPPR	Sep 1, 2024 - Aug 31, 2025	Department Administrator	Scheduled	(0)
Jul 1, 2026	NIH RPPR	Sep 1, 2025 - Aug 31, 2026	Department Administrator	Scheduled	(0)
Jul 1, 2027	NIH RPPR	Sep 1, 2026 - Aug 31, 2027	Department Administrator	Scheduled	(0)
Jul 1, 2028	NIH RPPR	Sep 1, 2027 - Aug 31, 2028	Department Administrator	Scheduled	(0)
Dec 31, 2029	Final Invention/patent report	Sep 1, 2028 - Aug 31, 2029	Department Administrator	Scheduled	(0)
Dec 31, 2029	Final technical/progress report	Sep 1, 2028 - Aug 31, 2029	Department Administrator	Scheduled	(0)

This will open the non-financial report home screen.

1 Report due Jul 1, 2025
NIH RPPR [History \(1\)](#) [Related links](#) [Submit deliverable](#) [Settings](#) **9**

2 **Scheduled** Submitted

Scheduled by  on Mar 19, 2025
Preparer Department Administrator
Preparer instructions None

[Open all](#) [Close all](#)

3 **Comments** 0 comments [Add comment](#)

4 **Report information** **5** [Edit deliverable](#) [Send reminder](#) **6**

Notification date: Jun 1, 2025
Primary recipient(s): Department Administrator
Additional notification recipients:
Central Administrator:
Fellow Investigator: All

Reporting period: Sep 1, 2024 - Aug 31, 2025
Due date: Jul 01, 2025
Autodraft continuation request: Yes
Linked continuation request: Continuation to be automatically drafted on Jun 1, 2025

7 **Documents** 0 documents [Upload](#)

1. The title at the top includes the report due date and type.
2. The report summary section displays the status of the report, the person who scheduled the report and the date it was scheduled, the preparer role/person, and any instructions added for the preparer.
3. Each report has a comments section where comments can be seen and comments can be added related to the report.
4. The report information panel includes information about the report, including reminder notification dates, recipients to receive notifications, the reporting period, and due date.

- a. If the report type is an NIH RPPR, additional fields will show whether a continuation request is automatically drafted, the draft date.

Report information [Edit deliverable](#) [Send reminder](#)

<p>Notification date: Jun 1, 2025</p> <p>Primary recipient(s): Department Administrator</p> <p>Additional notification recipients: Central Administrator: Fellow Investigator: All</p>	<p>Reporting period: Sep 1, 2024 - Aug 31, 2025</p> <p>Due date: Jul 01, 2025</p> <p>Autodraft continuation request: Yes</p> <p>Linked continuation request: Continuation to be automatically drafted on Jun 1, 2025</p>
--	--

- i. When the continuation has been drafted, there will be a link to the continuation request.

Report information [Edit deliverable](#) [Send reminder](#)

<p>Notification date: Jan 30, 2025</p> <p>Primary recipient(s): Department Administrator</p> <p>Additional notification recipients: Central Administrator: </p>	<p>Reporting period: Jul 15, 2024 - Apr 30, 2025</p> <p>Due date: Mar 01, 2025</p> <p>Autodraft continuation request: Yes</p> <p>Linked continuation request: 6595308</p>
--	---

- ii. If creation of a continuation request was unsuccessful, a message with an explanation will display.

Report information [Edit report](#) [Send reminder](#)

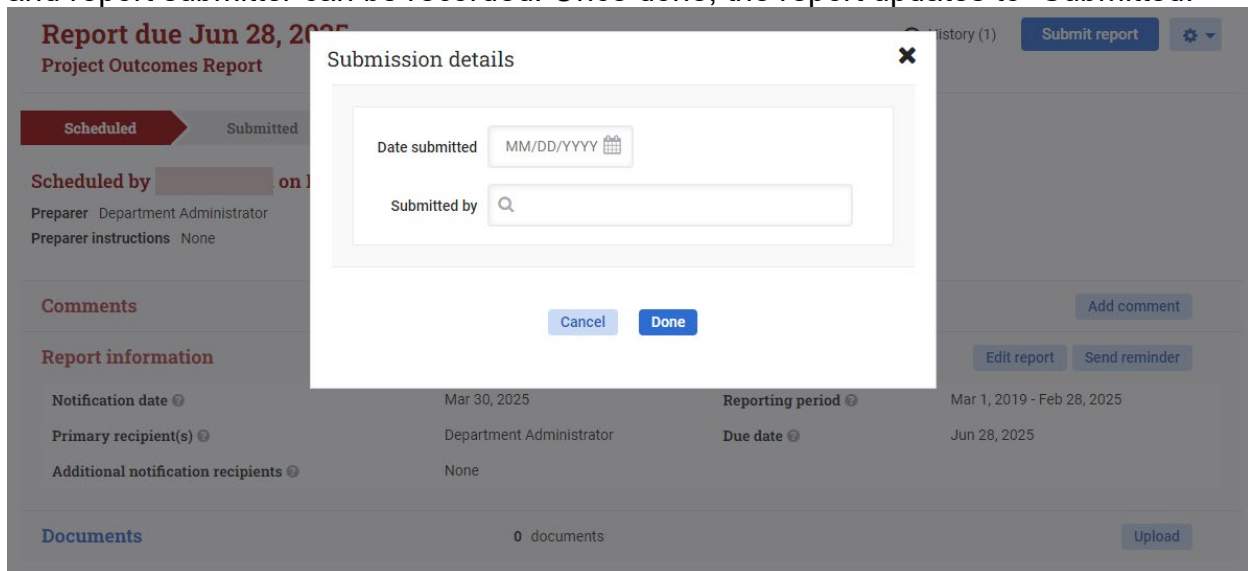
<p>Notification date: Oct 4, 2024</p> <p>Primary recipient(s): Department Administrator</p> <p>Additional notification recipients: None</p>	<p>Reporting period: Nov 1, 2023 - Nov 1, 2024</p> <p>Due date: Nov 03, 2024</p> <p>Autodraft continuation request: Yes</p> <p>Linked continuation request: No linked continuation request</p>
--	--

5. Report information can be edited by selecting the “Edit report” button. The report type cannot be changed, and if the wrong type was selected, the report will need to be deleted and rescheduled.
6. Before submission, the “Send reminder” option will be available, opening your email client with details and links related to the report and prepopulated recipients.
7. Each report has a document repository for submission documents, which should be locked for best practices (see [Document Repositories job aids](#) for more information).
8. At the top of each report a history link is available, showing when the report was scheduled and submitted, and who performed the actions. There may also be links for additional helpful information or related resources.
9. Actions that can be taken on the report are in the top right in the action buttons. The following actions are available:
 - a. Delete deliverable - will delete all data entry and associated history records related to the report. This action can only be performed when the report is in the “Scheduled” status.
 - b. Create continuation – creates a continuation request that links automatically to the report that created it. This action can only be performed on reports that are not linked to any when the report is in the “Scheduled” status.

- i. A continuation can only be created when the project has been awarded and the research team has been confirmed.
- c. Edit submission details – allows editing of the submission details related to the report. This action can only be performed when the report is in the “Submitted” status.
- d. Retract deliverable - will delete submission information and set the report back to “Scheduled” status. This action can only be performed when the report is in the “Submitted” status.

Submitting Non-Financial Deliverables

To submit a single report, on the report home screen, select “Submit report” in the top right-hand corner. This opens the submission details modal where the date submitted, and report submitter can be recorded. Once done, the report updates to “Submitted.”



To record multiple reports submitted together, from the non-financials list screen, select “Bulk submit deliverables” from the actions menu in the top right corner. All submitted reports can be selected, and the submission date and submitter can be entered.

Non-Financial deliverables Related links Info Create non-financial deliverables ⚙️

Open all | Close Delete deliverables Bulk submit deliverables

Due date	Type	Period	Preparer	Status
Nov 3, 2024	NIH RPPR	Nov 1, 2023 - Nov 1, 2024	Department Administrator	Scheduled
Nov 5, 2024	Technical/Progress report	Nov 1, 2024 - Nov 3, 2024	Central Administrator	Scheduled

Submit non-financial deliverables ✕

Select reports to submit

<input type="checkbox"/>	Due date	Type	Period	Status	Preparer
<input type="checkbox"/>	Nov 3, 2024	NIH RPPR	Nov 1, 2023 - Nov 1, 2024	Scheduled	Department Administrator
<input type="checkbox"/>	Nov 5, 2024	Technical/Progress report	Nov 1, 2024 - Nov 3, 2024	Scheduled	Central Administrator

Enter submission information

Date completed 📅

Submitted by

Cancel Submit non-financial deliverables

Deleting Non-Financial Deliverables

To delete a single report, on the report home screen, select “Delete report” from the action menu in the top right-hand corner.

To delete multiple reports together, from the non-financials list screen, select “Delete deliverables” from the actions menu in the top right corner. All scheduled reports that need to be deleted can be selected and deleted.

Non-financial deliverables Related links Info Create non-financial deliverables ⚙️

Delete non-financial deliverables ✕

<input type="checkbox"/>	Due date	Type	Period	Status	Preparer
<input type="checkbox"/>	Jul 11, 2024	Final Invention Statement	Jun 2, 2024 - Jun 11, 2024	Scheduled	Department Administrator
<input type="checkbox"/>	Jul 21, 2024	Final Invention Statement	Jun 12, 2024 - Jun 21, 2024	Scheduled	Department Administrator

Cancel Delete selected deliverables

Using the HART Dashboard for Non-Financial Deliverable Tracking

1. Navigate to the [GMAS Non-Financial Deliverables Report Dashboard](#) in HART.

Research Administration and Compliance Reporting > **GMAS Non-Financial Deliverables**

Hide prompts Show column chooser Current search: Deliverable status: Scheduled | Biz days until due: 0 - 60 | Segment st

Non-financial deliverable information

Deliverable status --Select Value--

Type --Select Value--

Other type contains --Select Value--

Preparer role --Select Value--

Preparer person --Select Value--

Preparer instructions contains --Select Value--

Continuation flag --Select Value--

Notification recipients contains --Select Value--

Submitted by --Select Value--

▶ Non-financial deliverable dates

▶ Non-financial deliverable comments

▶ Basic segment information

▶ Segment key information flags

▶ Segment approval flags

▶ Project owner

▶ Sponsor

▶ Segment dates

▶ Award dollars

▶ Financials

Project ID	Deliverable ID	Tub	Org	Type
12-05	5820961	570	50080	Final technical/progress r
12-05	5820962	570	50080	Final technical/progress r
12-05	5820963	570	50080	Final inventory/patent re
771-08	5819829	270	28520	Technical/Progress repor
1806-07	5858406	570	51720	Final technical/progress r
1538-00	5790123	520	45306	Technical/Progress repor
1818-00	5820960	520	48526	Non RPPR
18068-06	5729585	570	50080	Technical/Progress repor
18068-06	5729587	570	50080	Technical/Progress repor
212181-08	5707780	520	28711	Other Annual Report
216471-08	5820960	520	48526	Final inventory/patent re
216471-08	5820961	520	48526	Final technical/progress r
219278-06	5820967	520	64432	Non RPPR
219278-08	5820945	520	64432	Non RPPR
219539-08	5820936	520	48526	Non RPPR
224850-07	5899920	570	51240	Final technical/progress r
224850-07	5820960	570	51240	Final technical/progress r
224850-07	5820961	570	51240	Final technical/progress r
224850-08	5899333	520	28751	Technical/Progress repor
224850-08	5899334	520	28751	Technical/Progress repor

2. The Deliverable Status can be filtered to show Submitted and Scheduled reports.

Non-financial deliverable information

Deliverable status --Select Value--

Type

Other type contains

Preparer role

(All Column Values)

Scheduled

Submitted

Search...

3. See the [HART Dashboard GMAS Non-Financial Deliverable Job Aid](#) for more information on navigation, security and filtering.
4. When the report is run, the results will include all non-financial reports meeting the set parameters.

Helpful hints

Filter by dates to see what is due in the next 90 days. To clean up old reports, filter by status of Scheduled with due date in the past.

For more information related to the HART Dashboard, see the [HART Dashboard GMAS Non-Financial Deliverable Job Aid](#).

Helpful Links

- [OSP Reporting](#)

System Links

- [Grants Management Application Suite \(GMAS\)](#)
- [HART](#)

Documentation updates tracker

Update date	Description of updates
10/07/2025	Added information about the new option to create a continuation request from a non-financial RPPR.
1/13/2025	Updated information and links to new HART Dashboard.
8/30/2024	Updated to be aligned with the conversion of the non-financial deliverables to the updated GMAS format and to migrate the document into the new template.