Submitting Your Interim Report to GATE—PASO Grants

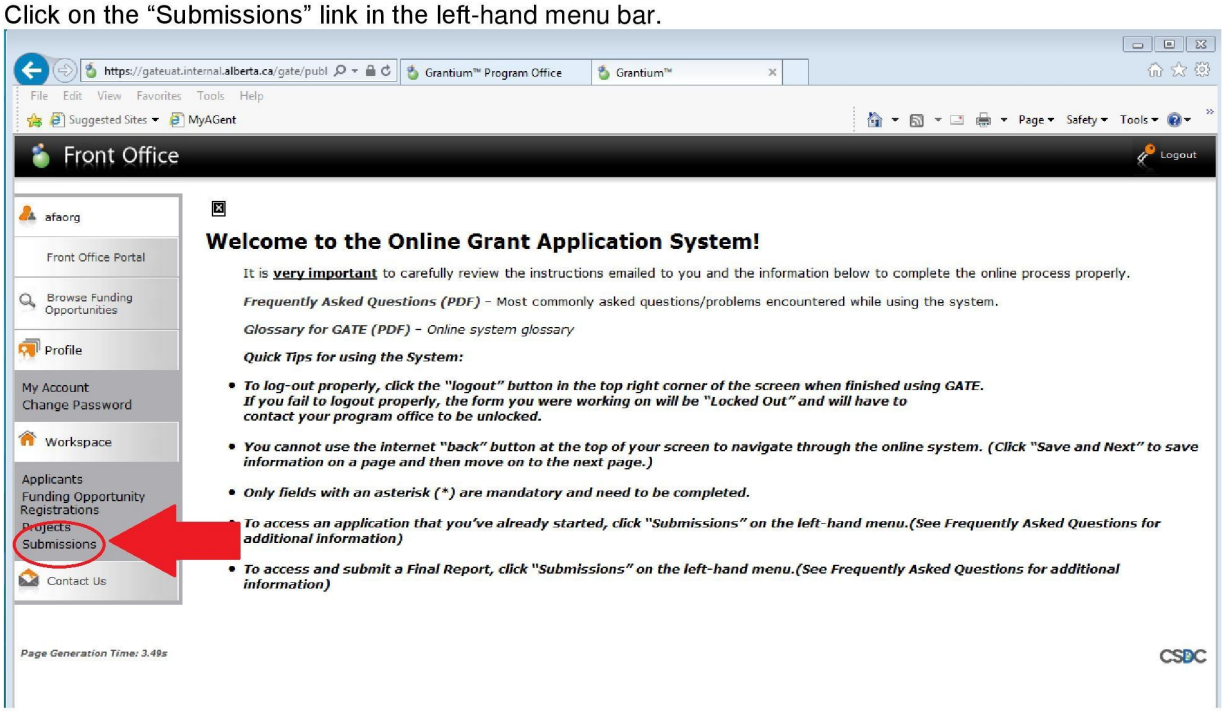
Before you even enter GATE, you will want to have an updated list of your board of directors (and the dates when they joined your organization), as well as the statistical information you supplied to CADAC. We also recommend that you collect the following documents (preferably formatted as PDFs) into a single folder, ready to be uploaded into the GATE system:

- Your organization's most recent approved financial statements (complete with Balance Sheet, Statement of Revenue and Expenditures, and Statement of Cash Flows, as prescribed by 3.13 of the Grant Guidelines). We also ask that your organization's Cash Reserve be clearly identified within your financial statement.
- Copies of promotional and publicity material (scanned together into one document no larger than 4 MB).
- A Completed Activity Report that summarizes the outcome of the previous year's activities.

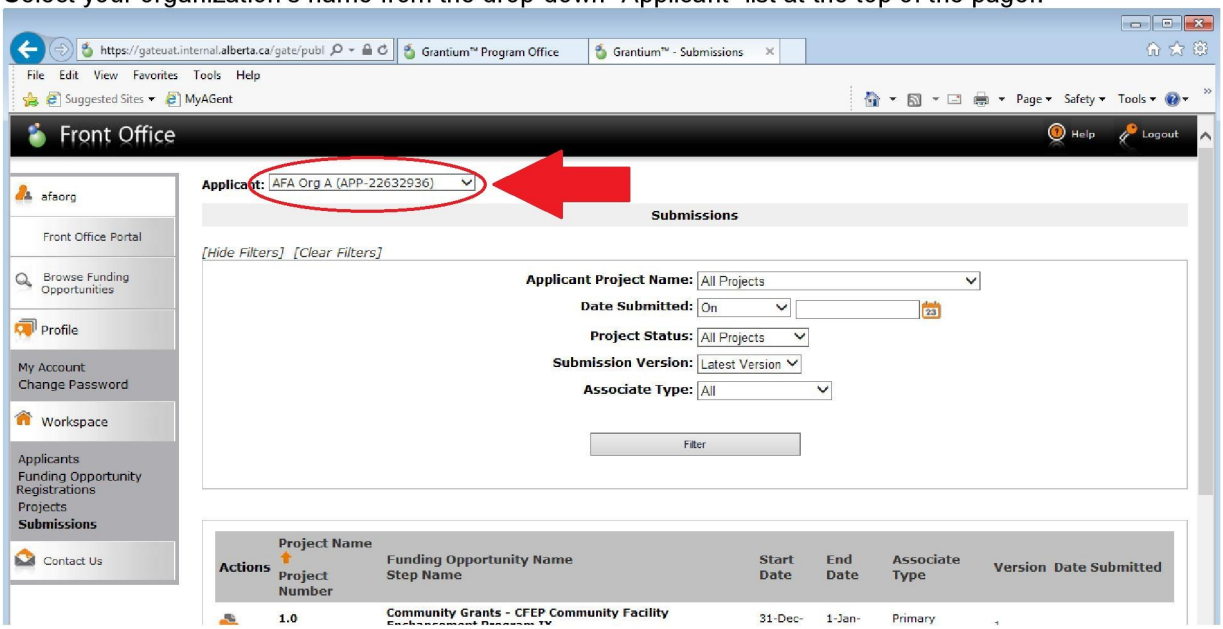
- A completed spreadsheet outlining the activities your organization has planned for the next fiscal year.
- A completed Material Change Report.
- A copy of your organization's most recent return from Alberta Corporate Registry.
- A detailed budget indicating all projected revenue and expenditures for the next operating year.

1. Log into GATE with your User ID and password.

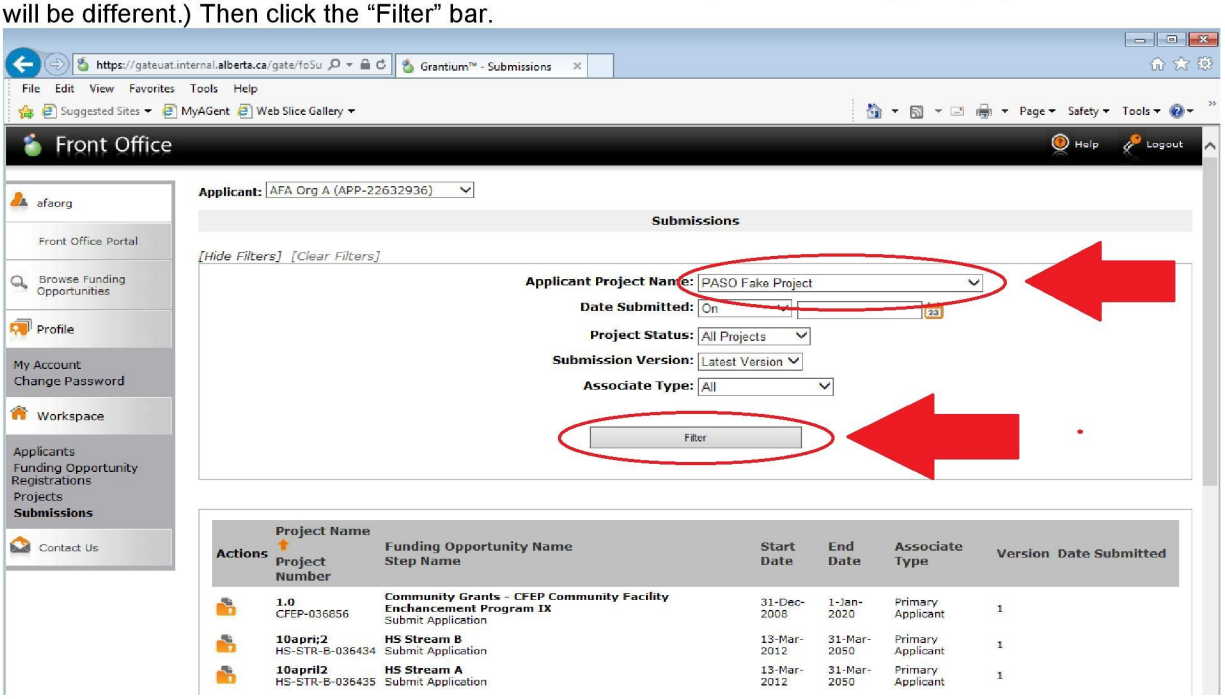
2. Click on the “Submissions” link in the left-hand menu bar.



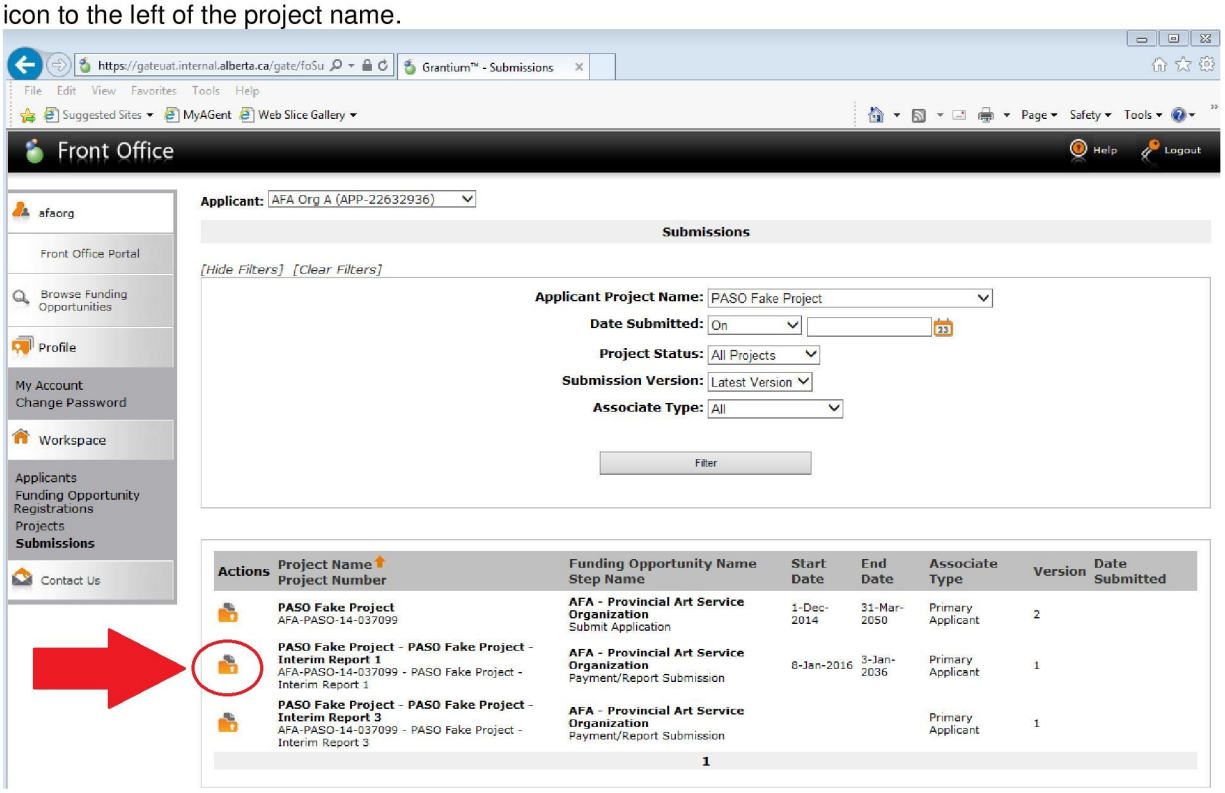
3. Select your organization’s name from the drop-down “Applicant” list at the top of the page..



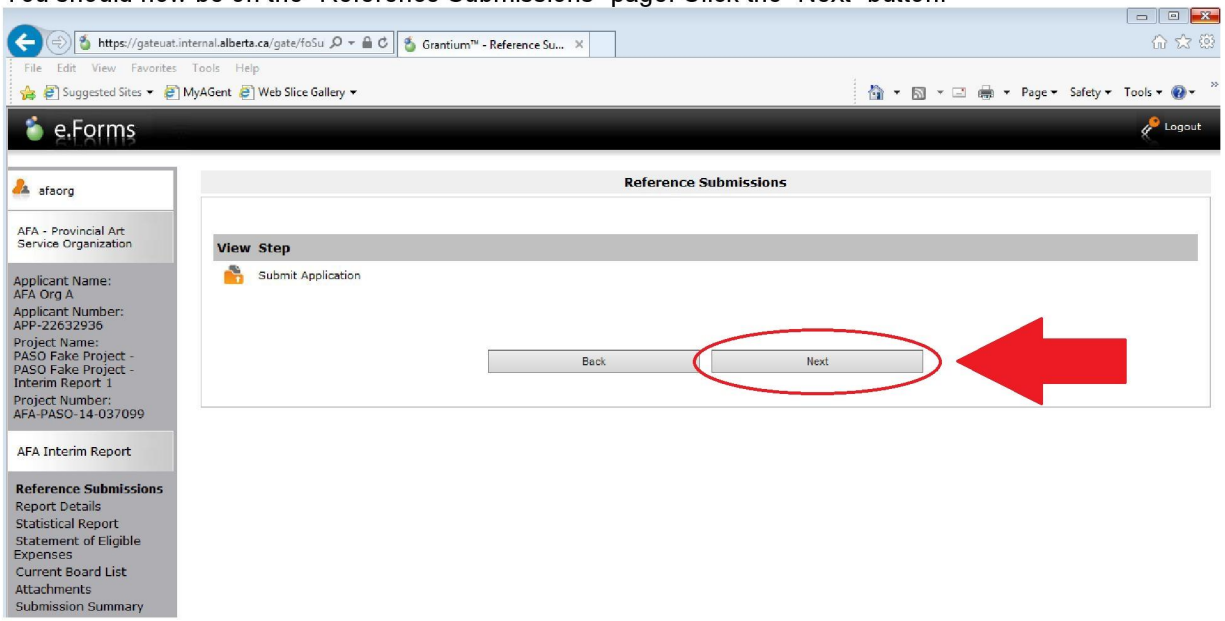
4. Select your project name from the “Applicant Project Name” drop-down list. (In the screenshots included with this guide, the project is called “PASO Fake Project”—obviously, your project name will be different.) Then click the “Filter” bar.



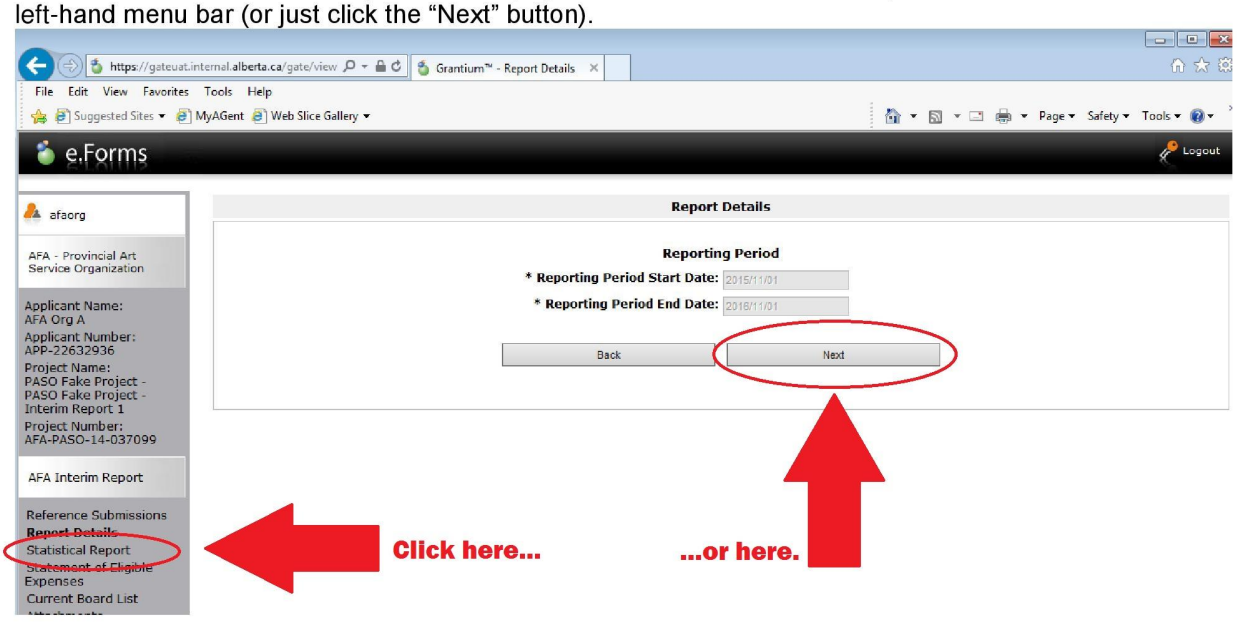
5. Scroll down the list and find the relevant project name—e.g., “2015-2017 Year 2 Interim Report” or in this example “PASO Fake Project – Interim Report 1.” Click on the little orange “file folder” icon to the left of the project name.



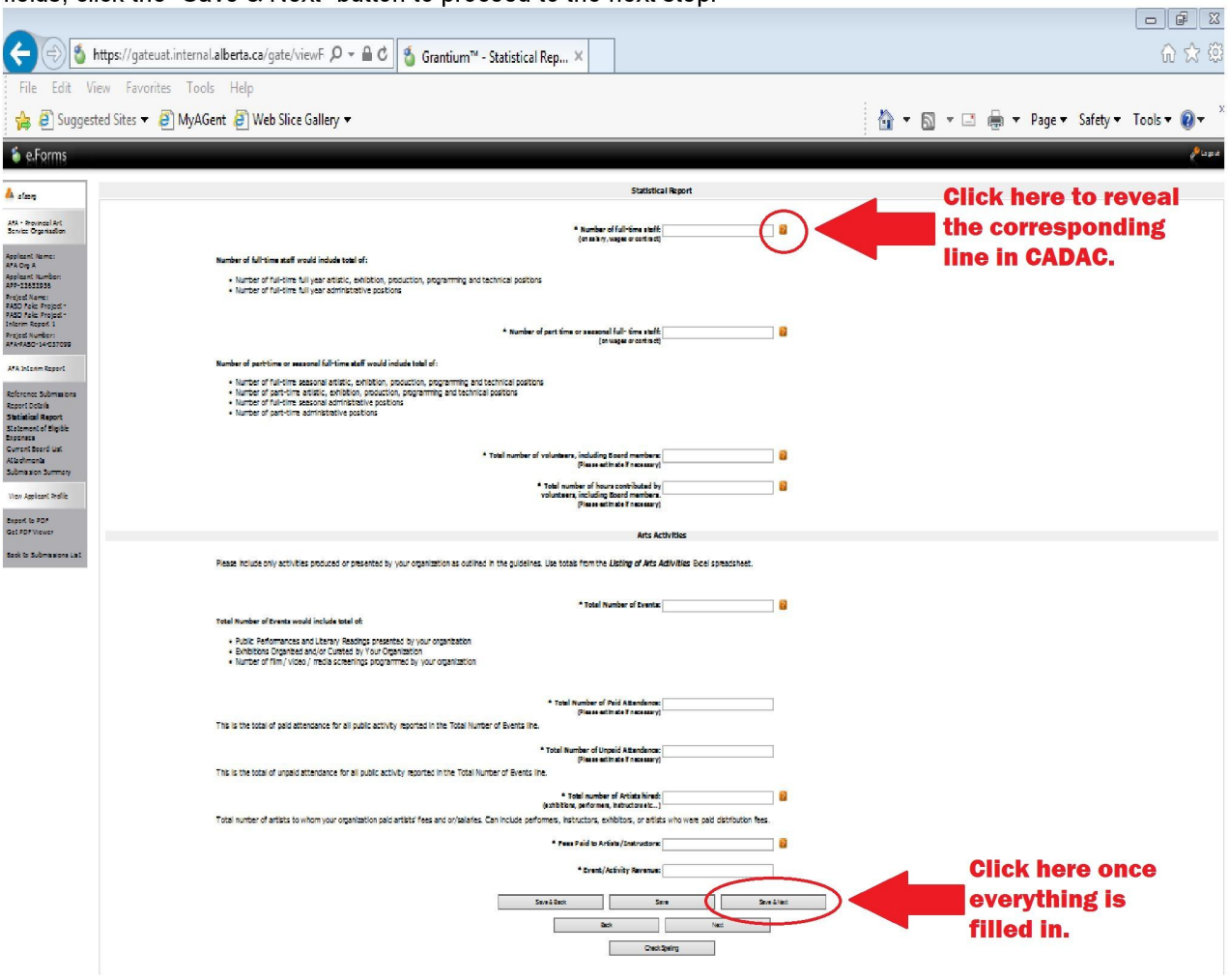
6. You should now be on the “Reference Submissions” page. Click the “Next” button.



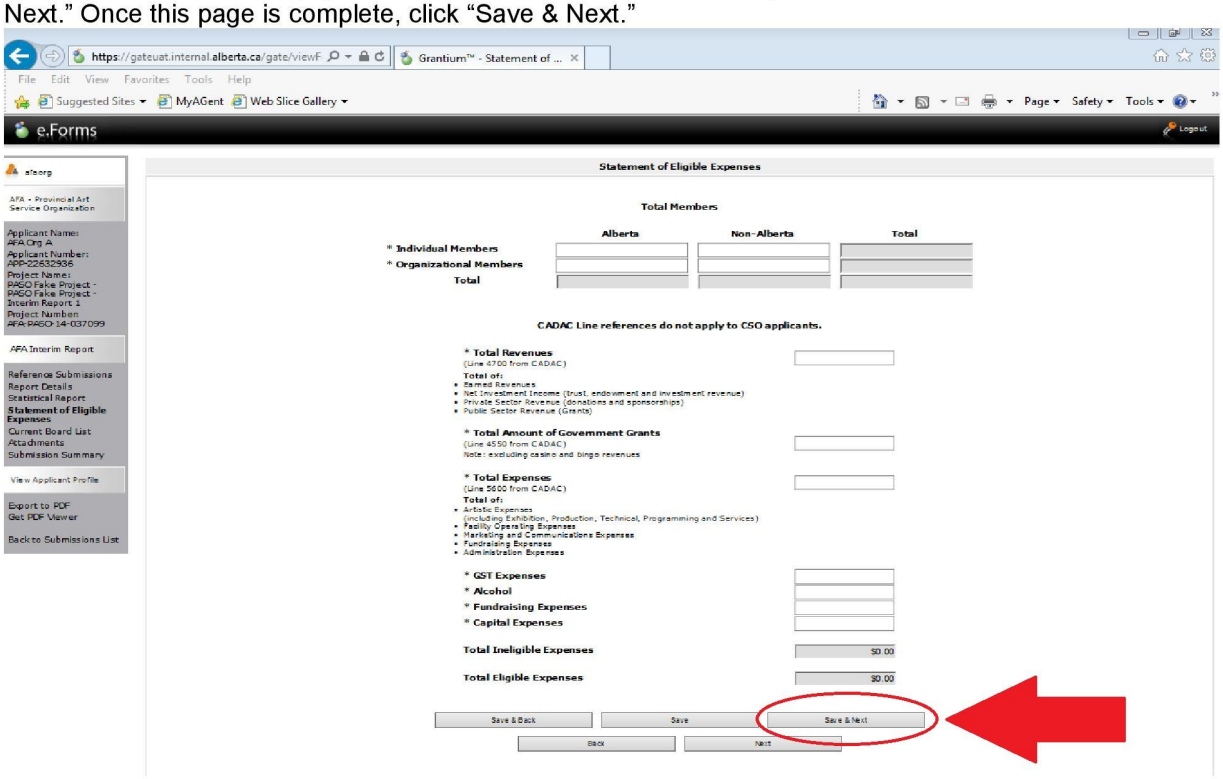
7. You should now be on the “Report Details” page. Click on the “Statistical Report” link from the left-hand menu bar (or just click the “Next” button).



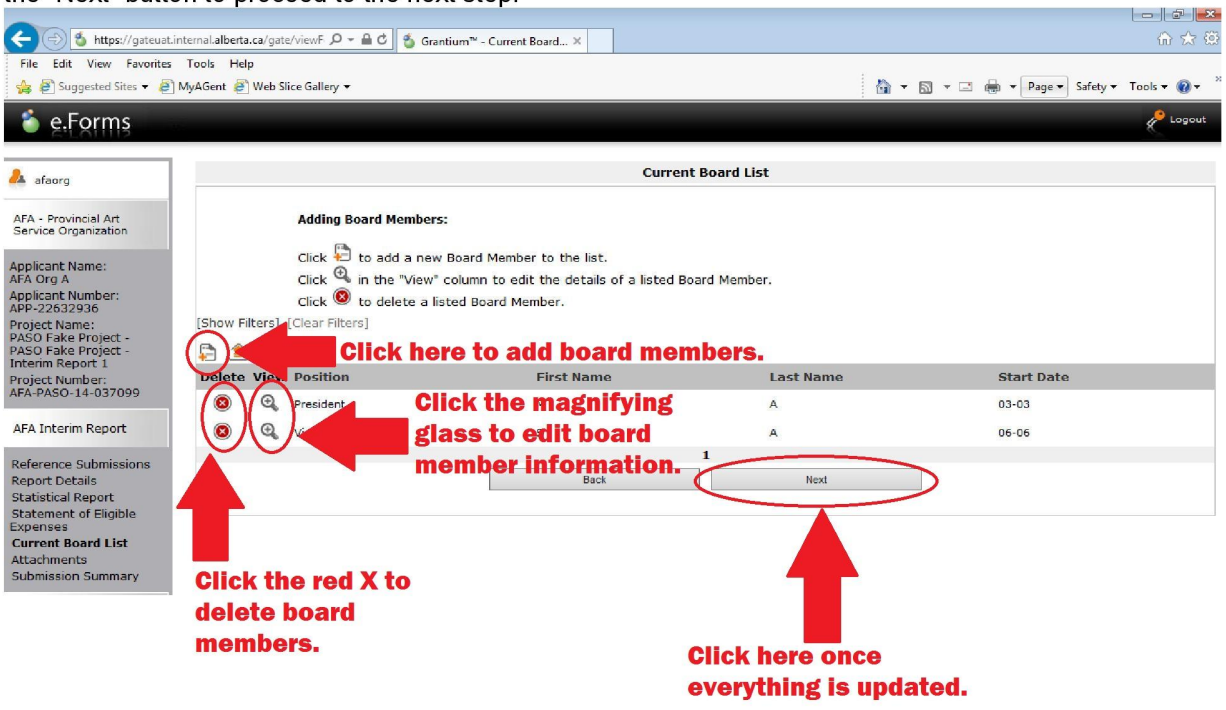
8. On the “Statistical Report” page, fill in all the mandatory fields (i.e., the fields marked with an asterisk) with the required information. These figures should match up with the ones you have already supplied to CADAC—indeed, clicking the little “question mark” icon with your cursor will reveal which line(s) in CADAC the field corresponds to. Once you’ve filled out all the mandatory fields, click the “Save & Next” button to proceed to the next step.



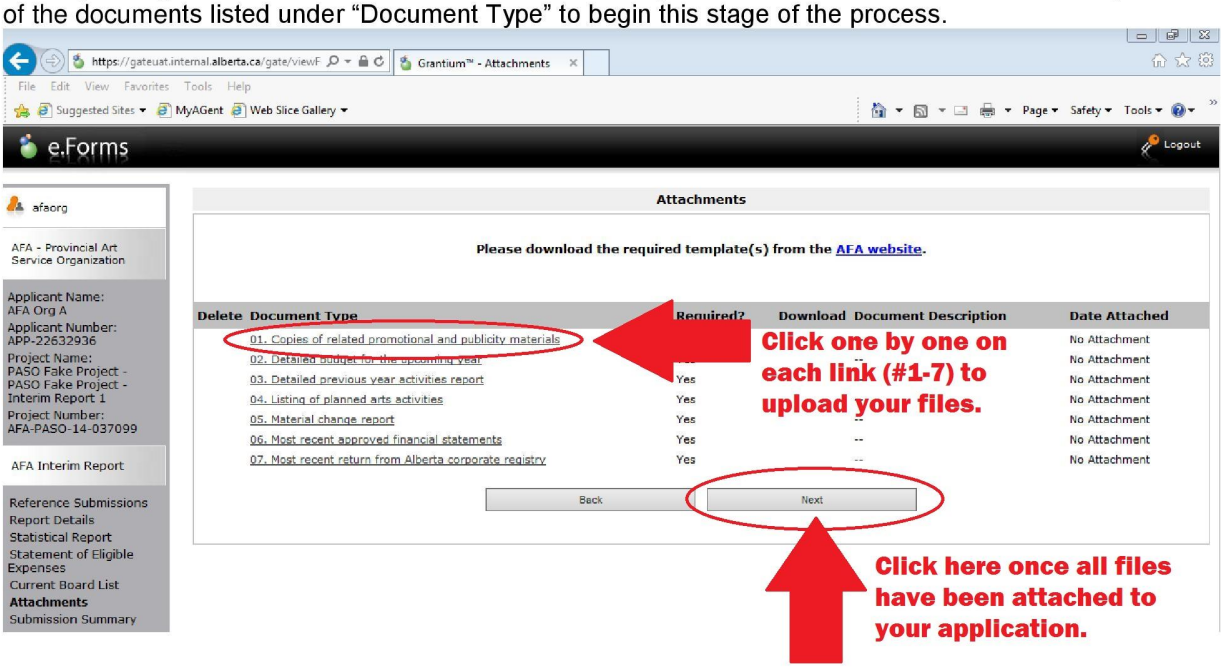
9. You should now be on the “Statement of Eligible Expenses” page. Fill in the mandatory fields, keeping in mind that the grey “Total” boxes will not be filled in until you click “Save” or “Save & Next.” Once this page is complete, click “Save & Next.”



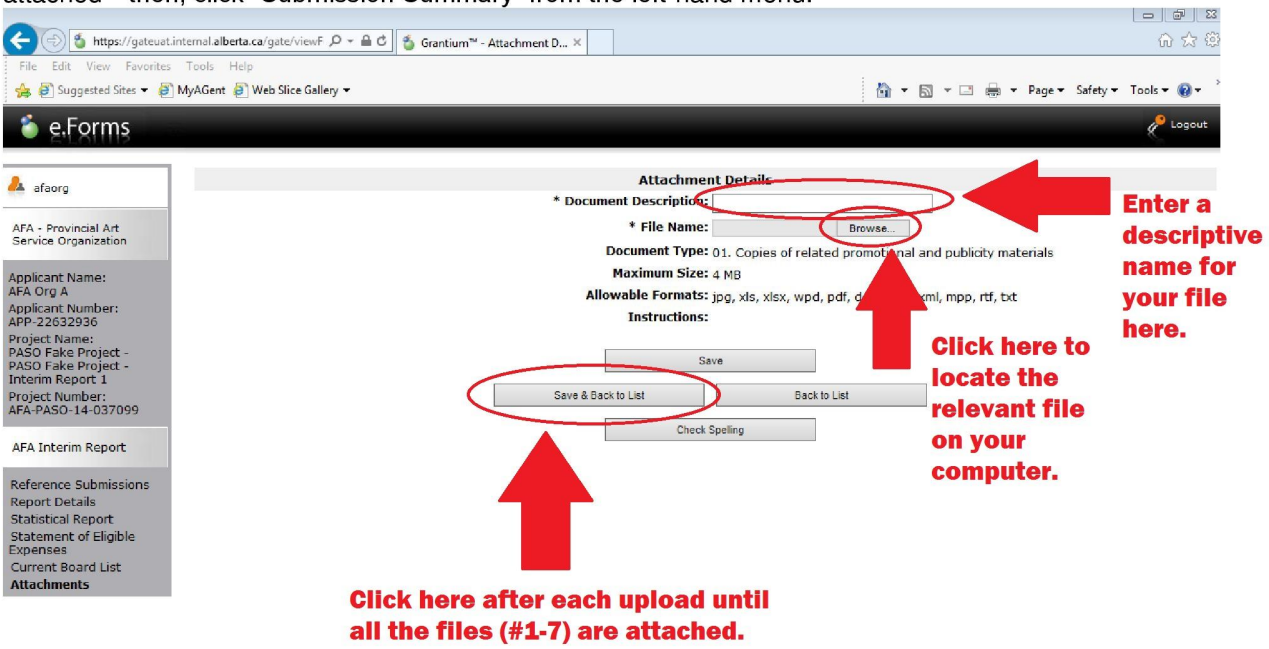
10. You will now find yourself on the “Current Board List” page. GATE will auto-fill this information from your application form, but you may need to update it by adding new board members and removing departing members. To add new members, click the little document icon with the plus sign located just above the board list. To delete a board member, click the “X” icon in the “Delete” column of the board list. To edit information about an existing board member, click the “magnifying glass” icon in the “View” column of the board list. Once everything is updated, click the “Next” button to proceed to the next step.



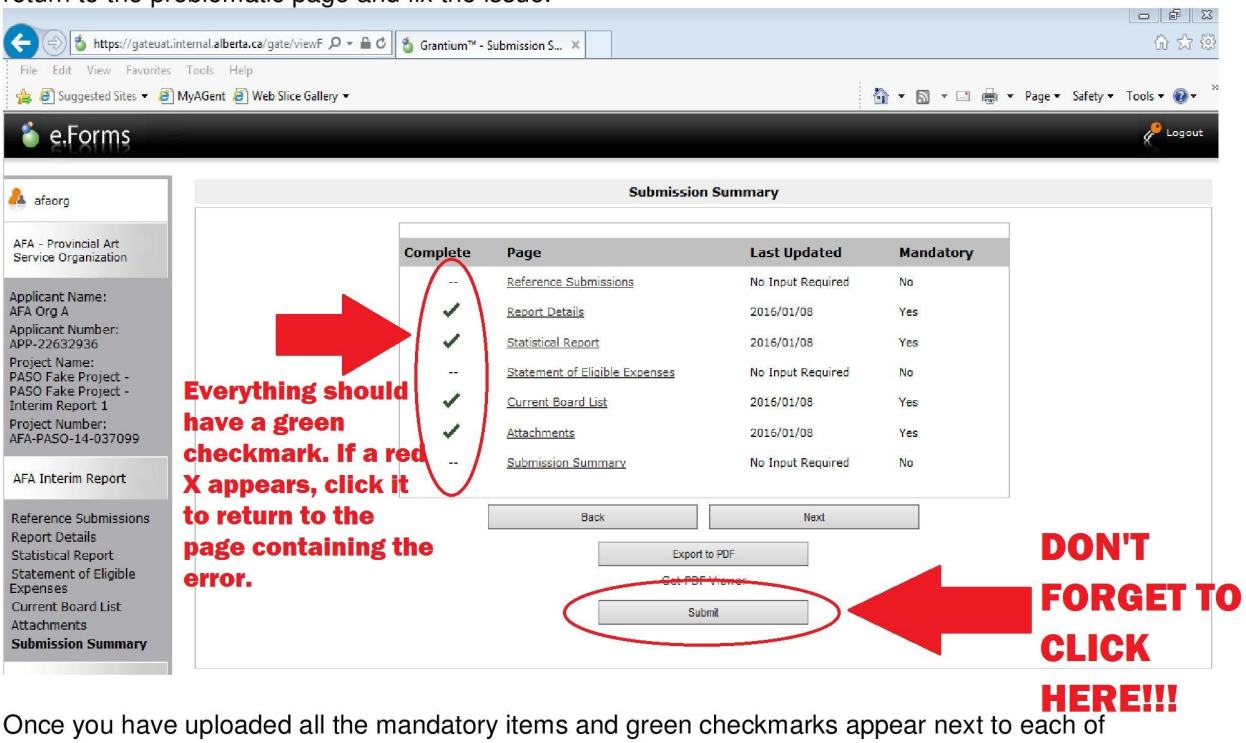
11. You are now on the “Attachments” page. This is the page where you will upload the files we asked you to gather into a common folder back at the very start of these instructions. Click on any of the documents listed under “Document Type” to begin this stage of the process.

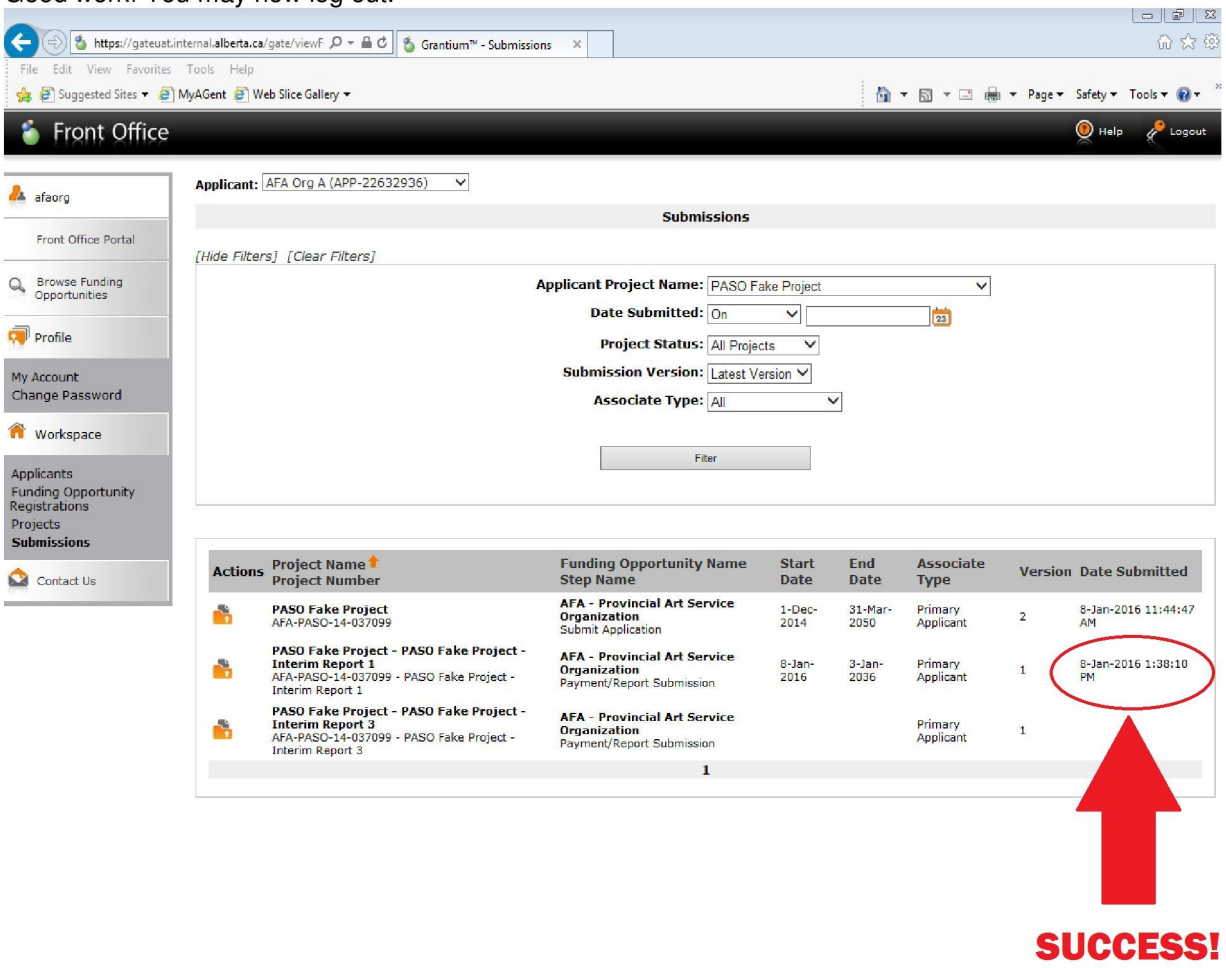


12. You will now find yourself on the “Attachment Details” page. First, give your document a name and type it into the “Document Description” field—use a simple descriptive phrase such as “Promo Material” or “Material Change Report.” Then, click the “Browse” button next to “File Name.” Find and select the relevant file on your desktop, making sure it is in one of the formats listed under “Available Formats.” Once the file is uploaded, click the “Save & Back to List” button to return to the “Attachments” page. Repeat this step until all the required files have been attached—then, click “Submission Summary” from the left-hand menu.



13. This will bring you to the “Submission Summary” page. Here, you will find a list of all the items you are submitting as part of your final report. Check to make sure that there is a green checkmark beside all the items that are listed as “Mandatory.” If a red X appears next to any of these items, your report is incomplete or contains an error—click the link next to the red X to return to the problematic page and fix the issue.



14. Once you have uploaded all the mandatory items and green checkmarks appear next to each of them on the “Submission Summary” page, you are ready to submit your report. Click the “Submit” button. (DO NOT NEGLECT TO CLICK THE SUBMIT BUTTON! Your Arts Development Consultant will not receive your report unless you click this button!) If the Submit button becomes greyed out and you receive a message that reads “This e.Form has been submitted,” then congratulations! Your report is complete!

15. You can double-check your submission by clicking the “Back to Submissions List” link in the left-hand menu bar and returning to the “Submissions” page. If you look at the “Date Submitted” column, you should now see today’s date and time next to the report you just finished working on. Good work! You may now log out.