

Opioid Quarterly Report

Initiating a Quarterly Report:

Roles that may initiate the report: Authorized Official, Agency Administrator, Agency Fiscal

Access your application in the “Contract/Agreement Executed” status. Scroll to the bottom of the forms menu and select the “Initiated Related Doc” button. A modal will pop up to initiate the sub document. Under “Available Documents” select “Opioid Quarterly Report 2025 Q{x}” and click create.

NOTE: An application in this status will not appear in the “My Tasks” menu – you’ll need to utilize the application search function.

Completing a Quarterly Report:

Roles that may complete the report: Authorized Official, Agency Administrator, Agency Fiscal

Expenditure Summary:

The expenditure summary form summarizes:

- **Approved Budget:** The amount of funding the agency was approved for
- **Budget to Actual:** The difference between the approved budget and expenditures to date (this includes the current quarter)
- **Expenditures This Quarter:** these values will populate based on what’s entered on the Expenditure Detail form for the current quarter
- **Previous Expenditures:** The total of expenditures from ALL previous quarters

The Description and Approved Purpose fields are required for any category where expenditures for the current quarter exist.

Expenditure Detail:

The expenditure detail form is where expenditures for the current quarter are reported. The expenditure amounts entered on this form will populate into the corresponding budget category on the Expenditure Summary form.

Use the  button on the right to add rows to the table to report multiple expenditures. All fields on this form are required with the exception of the “Notes” field.

Narrative:

This form gathers information regarding the progress of the project in areas such as:

- Goals, Activities and Timeline
- Challenges and Barriers
- Lessons Learned/Solutions
- Budget Performance
- Staff Changes

All fields on this form are required.

Opioid Quarterly Report

Submitting a Quarterly Report:

Roles that may submit the report: Authorized Official, Agency Administrator, Agency Fiscal

Before submitting, you should have:

- Reported all expenditures for the quarter on the Expenditure Detail form
- Reviewed/verified all expenditure data on the Expenditure Summary form
- Responded to all questions on the Narrative form

Once the above items have been completed, locate the “Status Options” section near the bottom of the forms menu on the left. Select “SUBMIT.”

If there are any active errors on any of the forms, or if any forms are not complete, you will receive an error not allowing you to submit until those issues are resolved.

Otherwise, a confirmation modal will pop up asking you to confirm the status change. Select “OK” to submit the report.

Quarterly Report Revisions:

Roles that may make revisions: Authorized Official, Agency Administrator, Agency Fiscal

After submitting a quarterly report, it is reviewed by OAG staff. It is possible that they may request revisions to your report.

If this were to occur, you would receive a notification (both in-system and via email) alerting you that revisions have been requested. This notification will contain notes from the OAG staff outlining the requested changes.

If you receive a notification requesting revisions:

In your “My Tasks” panel on your user dashboard, access the quarterly report to be revised. From there, you may update any of the forms as needed, based on the notes from the OAG staff.

After completing the updates, locate the “Status Options” section near the bottom of the forms menu on the left. Select “SUBMIT.”

If there are any active errors on any of the forms, or if any forms are not complete, you will receive an error not allowing you to re-submit until those issues are resolved.

Otherwise, a confirmation modal will pop up asking you to confirm the status change. Select “OK” to re-submit the report.