



# Guide to HMSTrust Online Grant Reporting

Every grantee is required to provide a Final Report and Financial Acquittal within two months of the completion date of their project.

Multi-year grants require a satisfactory annual Progress Report and Financial Acquittal in accordance with an agreed schedule in order to release the next grant payment.

The reporting schedule is outlined in Schedule A of the Standard Grant Conditions provided when the offer of grant was made and accepted.

If you have any problems, please contact us on 03 9999 3000 or email [grants@hmstrust.org.au](mailto:grants@hmstrust.org.au)

## Web Browser

Ensure you have enabled cookies on your web browser before you start. If you are unsure how to enable cookies, simply search 'enabling cookies' and follow the instructions relating to your browser.

Applicants often experience issues when using the Chrome web browser, we therefore recommend using an alternate web browser such as Internet Explorer.

## Important:

When filling in your report form, do **not** use the back or forward button of your browser to navigate through the form as you may lose information you have entered but not yet saved. Only use the page links across the top of the application form or the Next button at the foot of the screen.

## Accessing your Online Grant Report

1. Select "My Account" from the drop-down Grantees menu on the HMSTrust website at [www.hmstrust.org.au](http://www.hmstrust.org.au)
2. Enter your email address and password to log in.
  - a. If you have forgotten your password, click "Forgot Password", and enter the email address used to setup your account. You will receive an email to the email address entered, with your new password.
  - b. If you want to change the email or password associated with your account, login with the existing email and password and then click on the "Change email/password" at the top of the page.
  - c. If you no longer have access to the email address associated with the account, please contact us at [grants@hmstrust.org.au](mailto:grants@hmstrust.org.au)

3. Your account page will open.
4. Click to select the pale grey “Requirements” box at the top left of the page. Your report should appear below the black title line.

If you are returning to complete a report you have already commenced, choose the drop-down box next to “Show” and select “In Progress Requirements”.

5. Click on the link for the report under “Form Name” to open the online report form.

## Writing Tips

1. We suggest you first print out the blank form to help you prepare your answers and required attachments. To print the form, open it and click the “Printer Friendly Version” button at the top of the window and then use your browser’s Print button.
2. You can prepare your answers in Word and then cut-and-paste into the online form. This will prevent you losing your text should your internet connection drop out.
3. Several questions have enforced word limits for the answers. You will not be able to save or submit your form if you have gone over the word limit.

## Financial Acquittal

1. You will need to attach a financial report showing details of total project income and expenditure which is to be signed and dated by your organisation’s CEO or equivalent, scanned and attached to your online report.
2. A preferred template is available from our website under [Grantees/Forms](#) to show the budget (taken from your original grant application) and the actual final income and expenditure.

## Saving Your Report

1. The form automatically saves what you have already entered when you click “Next” at the foot of the page or when you select a new tab across the top of the form.
2. You can save your report and return to it later by selecting the “Save and Finish Later” button at the foot of the page. This will allow you to enter and input information at different times until you are ready to submit the completed form.


## Email a Draft

1. You can email a draft of the online report form to a colleague for further review by clicking on the “E-mail Draft” button at the top of the page.

## Transferring, Viewing and Emailing the Online Grant Requirement

### 1. Transfer Ownership of the Grant Requirement


You can transfer the ownership of this report to a colleague if they are to take responsibility for it:

- a. In the main Requirements page where the form is listed, click on the  icon on the far right under “Action” in the black menu bar.
- b. A new window will open up with an automated email. Enter in your name and the email address of the person. Click on the “Check Email” box to see if they already have an account registered with HMSTrust. If not, a separate e-mail will be sent to their e-mail address to create an account before the transfer can be accepted.

- c. Click the “Transfer” button to complete the procedure. The requirement will not be transferred to the new owner until they have accepted the transfer.


## 2. Allowing Others to View the Grant Report

You can enable others to view the report:

- a. In the main Requirements page where the form is listed, click on the  icon on the far right under “Action” in the black menu bar.
- b. A new window will open up with an automated email. Fill in the necessary sections to give one or more colleagues rights to log in to view the report.
- c. Click the Update button to activate.

## 3. Emailing a Copy

You can email a copy of the grant report to another person:

- a. In the main Requirements page where the form is listed, click on the  icon on the far right under “Action” in the black menu bar.
- b. A new window will open up with an automated email. Fill in the necessary sections to email a copy of the report to one or more email addresses. A maximum of 10 addresses is allowed.
- c. Click on the Submit button to activate

## Submitting Your Completed Report

1. When you have finished entering all the required information and attachments, click the “Review and Submit” button. This is a two-stage process and does not automatically submit the report straight away.
2. Review the report to make sure it is correct. If you need to make further changes, you can do so at this point.
3. You can print a copy of your completed report using the “Printer Friendly Version” button.
4. Once you are satisfied with the report, scroll to the bottom of the page and click “Submit”. Your report will not be received by HMSTrust until you complete this step.
5. You will receive a confirmation email confirming that your report has been sent and including a copy of the report.
6. After the report has been submitted, you will be able to access a copy. Log in to “My Account”. Click to select the pale grey “Requirements” box at the top left of the page. From the drop-down box next to “Show” above the black menu bar, select “Submitted Requirements”. Your report and any other previously submitted requirements should be listed.

If you have any questions or encounter technical difficulties, contact HMSTrust on 03 9999 3000 or by email to [grants@hmstrust.org.au](mailto:grants@hmstrust.org.au)