



Shortcut – inForm Tool

Options for Revising a Report



Purpose

The purpose of this Shortcut is to provide summary information regarding points in the report submission process when a report can be revised in inForm.

Summary

There are opportunities at various steps in the inForm tool to modify data and information in a report before the Grantor approves or locks down the report. inForm also offers the option of creating a Revision Report after a report has been approved. The following identifies various points at which a report can be modified and the general approaches to modifying the report. This discussion is not intended to be a step-by-step tutorial for making revisions.

| Before Certifying | After Certifying | After Submitting and before Grantor Approval | After Approval |
|---|--|--|---|
| <ul style="list-style-type: none">•Make edit(s)•Save | <ul style="list-style-type: none">•Uncertify•Make edit(s)•Save, revalidate and recertify | <ul style="list-style-type: none">•Unsubmit•Make edit(s)•Save, revalidate, recertify, and resubmit | <ul style="list-style-type: none">•Create a Revision report by selecting the Action of New/Edit/Revise Report on the Form Selection Page•Make edit(s)•Save, validate, certify, and submit |

Data fields can be edited by selecting the data field’s drop-down menu of response options and clicking the revised response option.

If you ended a session in the inForm tool and would like to make edits to a report that has not been approved, click Report Form Entry on the OLDC Home page to access the Form Selection page. Follow the steps on the Form Selection page and select the Action of New/Edit/ Revise Report. Select the appropriate section requiring edits and the Action of Edit Section. Edit appropriate fields.

Options for Revisions

Before Certifying a Report – Before a report is certified, simply edit the field by selecting the field’s response options and clicking the revised response option.

After Certifying a Report - If a report has been certified and requires edits, the report must first be uncertified by clicking the Uncertify button. This will allow modification of data previously entered in the report. After completing the edits, save, revalidate and recertify the report again.

After Submitting a Report and Before Approval – An additional option for making edits: if the report has been submitted but the Grantor has not approved or locked down the



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report, click the Unsubmit Report button. This enables revision of the report. Once revisions are made and saved, revalidate, recertify and resubmit the report.

After a Report is Approved – inForm offers the option to create a Revision Report after a report has been approved. A Revision Report is an exact duplicate of the original approved report. However, the data fields are open and modifications can be made.

To create a Revision Report, from the OLDC Home page, click Report Form Entry to access the Form Selection page. Follow the steps on the Form Selection page and select the Action of New/Edit/Revise Report to access the report. The Report screen displays and appears like the original report. However, the Report name includes Revision and the Revision number. Make the desired edits in the report.

Submit the revision report using the same steps of save, validate, certify, and submit.

There are multiple opportunities to edit data and information in the inForm tool. Remember to save the report after making the appropriate edits!