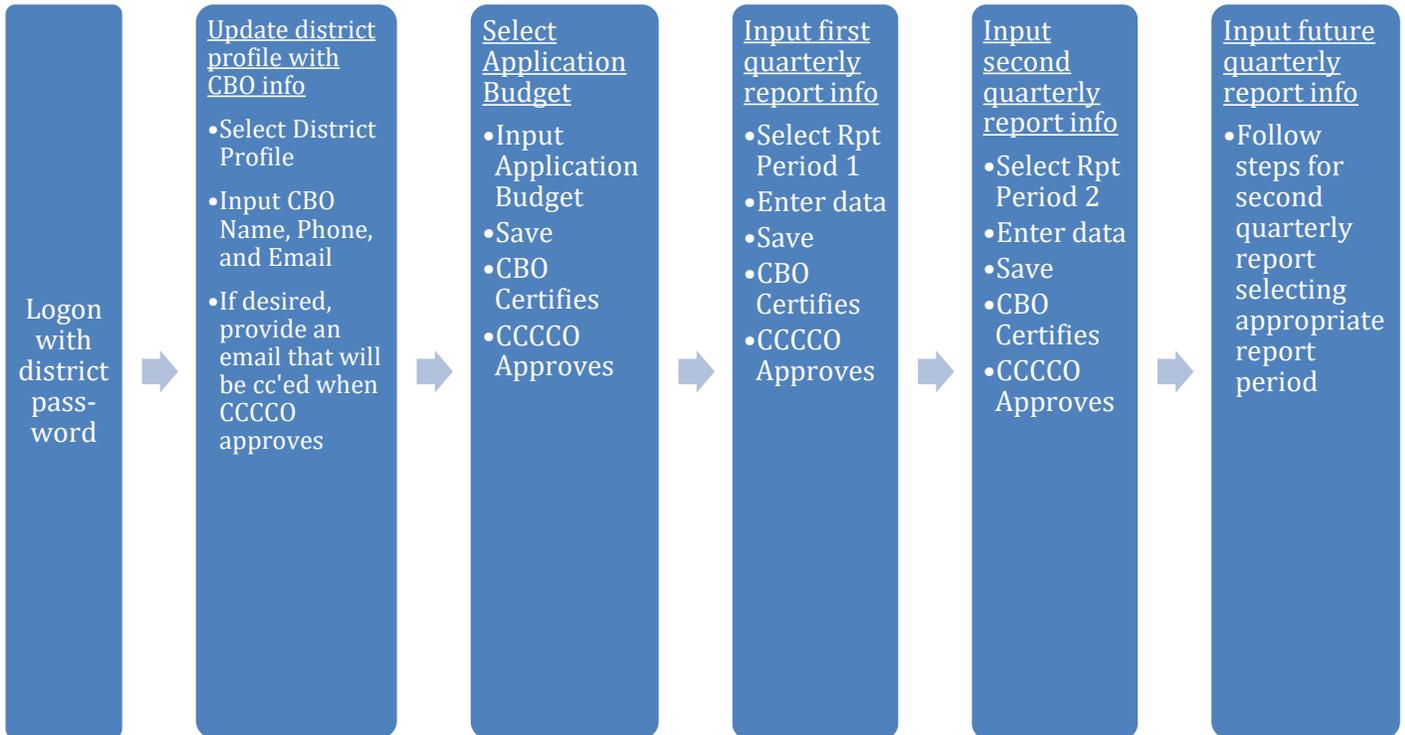# Basic Skills and Student Outcomes Transformation (BSSOT) Year-to-Date Web-Based Expenditures and Progress Reporting User Guide

For question about inputting data into the web-based system, please contact the Basic Skills and Student Outcomes Transformation (BSSOT) grant monitor, Chantée Guiney at cguiney@cccco.edu or (916) 322-4260.

Contents:

Process Overview:

Logon with district pass-word	Update district profile with CBO info • Select District Profile • Input CBO Name, Phone, and Email • If desired, provide an email that will be cc'ed when CCCCO approves	Select Application Budget • Input Application Budget • Save • CBO Certifies • CCCCO Approves	Input first quarterly report info • Select Rpt Period 1 • Enter data • Save • CBO Certifies • CCCCO Approves	Input second quarterly report info • Select Rpt Period 2 • Enter data • Save • CBO Certifies • CCCCO Approves	Input future quarterly report info • Follow steps for second quarterly report selecting appropriate report period

Modes

There are two modes within the database system: Data Entry Mode and Certification Mode. They both use the same logon screen, but the password you enter determines the mode of the account. Data Entry mode is used for inputting your data, and Certification mode is primarily used by the CBO to certify the accuracy of the data submitted. Inputting and certifying is described in detail on the following pages.

Two passwords will be provided to each college via email. The Project Director has already been sent the Data Entry password. The Chief Business Officer (CBO) will be sent both the Data Entry and Certification passwords once his/her contact information is entered in the District Profile. Contact the grant monitor at the Chancellor's Office, Chantée Guiney, for more information or if you encounter problems accessing the website: cguiney@cccco.edu or (916) 322-4260.

Data Entry Mode

When the Data Entry Only password is used, the application is set to Data Entry mode. The Data Entry mode can be used to enter and save the data as the submission process progresses. The data entry password can also certify the Application and Final report budgets.

> *Note: The session can be saved and resumed at a later time by selecting the Save/Update button described below. For security reasons, users must press the Save/Update button within 30 minutes of accessing the data entry page or the user session will expire. Data entered since the last "Save" will be lost if the session expires. Each "Save/Update" resets the 30-minute timer.*

Certification Mode

When the Certification password is used, the application is set to Certification mode. This mode allows complete access to the district account including data entry or update, save, and certification. Similar to the Data Entry mode, the session can be saved and resumed at a later time by selecting the Save/Update button as described above.

> ***Warning***: *Once a submission is certified, the data cannot be edited. If changes or updates are required after certification, contact Chantée Guiney.*

Logon Screen

The Academic Affairs Year-To-Date Expenditures and Progress reporting application is available through the "Extranet Online Web Application Site" at http://misweb.cccco.edu. The Logon screen can be accessed directly at: https://misweb02.cccco.edu/bssp/prod/logon.cfm. This usage guide is also available on the Chancellor's Office BSSOT website at http://extranet.cccco.edu/Divisions/AcademicAffairs/BasicSkillsEnglishasaSecondLanguage/StudentOutcome.aspx.
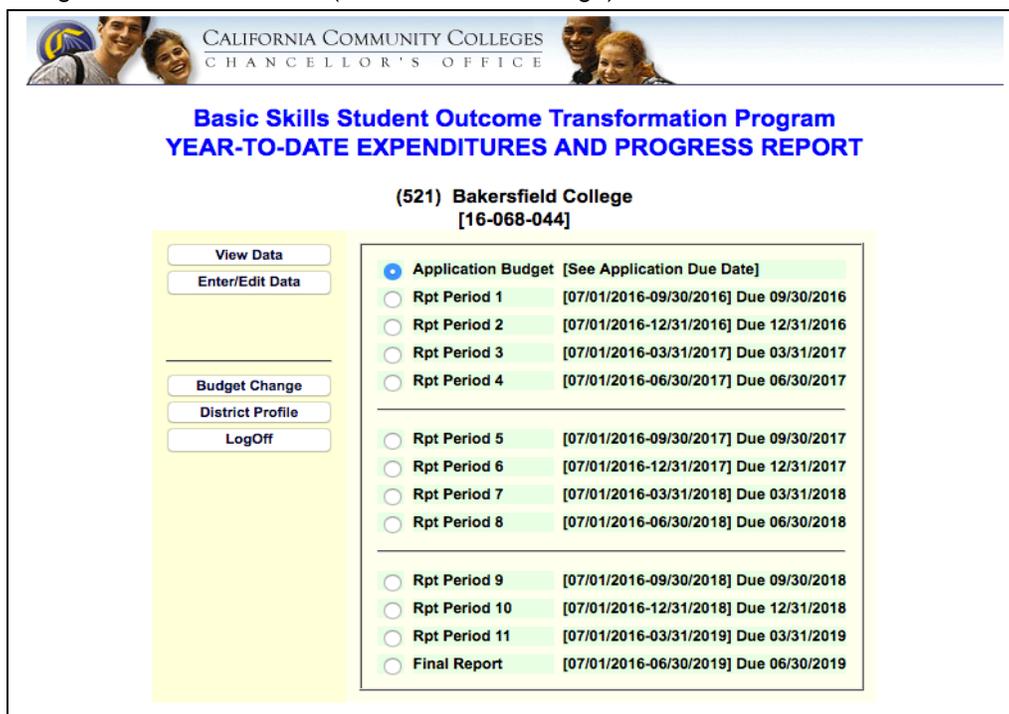
Figure 1 – Logon Screen

CALIFORNIA COMMUNITY COLLEGES
C H A N C E L L O R ' S   O F F I C E

ACADEMIC AFFAIRS
YEAR-TO-DATE EXPENDITURES AND PROGRESS REPORT

District/College	Select A District/College
Grant	Select A Grant
Password	••••••

Logon to the district account by following the steps below:

1. Select your district.

2. Enter the appropriate password for "Data Entry Only" or "Certification" mode (the certification function is not available under Data Entry Only mode).

3. Select the "Logon" button.

Home Screen

Once you log on to the system, you will see your home screen similar to Figure 2.

Figure 2 – Home Screen (for Bakersfield College)

CALIFORNIA COMMUNITY COLLEGES
C H A N C E L L O R ' S   O F F I C E

Basic Skills Student Outcome Transformation Program
YEAR-TO-DATE EXPENDITURES AND PROGRESS REPORT

(521) Bakersfield College
[16-068-044]

View Data	● Application Budget	[See Application Due Date]
Enter/Edit Data	○ Rpt Period 1	[07/01/2016-09/30/2016] Due 09/30/2016
	○ Rpt Period 2	[07/01/2016-12/31/2016] Due 12/31/2016
	○ Rpt Period 3	[07/01/2016-03/31/2017] Due 03/31/2017
Budget Change	○ Rpt Period 4	[07/01/2016-06/30/2017] Due 06/30/2017
District Profile		
LogOff	○ Rpt Period 5	[07/01/2016-09/30/2017] Due 09/30/2017
	○ Rpt Period 6	[07/01/2016-12/31/2017] Due 12/31/2017
	○ Rpt Period 7	[07/01/2016-03/31/2018] Due 03/31/2018
	○ Rpt Period 8	[07/01/2016-06/30/2018] Due 06/30/2018
	○ Rpt Period 9	[07/01/2016-09/30/2018] Due 09/30/2018
	○ Rpt Period 10	[07/01/2016-12/31/2018] Due 12/31/2018
	○ Rpt Period 11	[07/01/2016-03/31/2019] Due 03/31/2019
	○ Final Report	[07/01/2016-06/30/2019] Due 06/30/2019

Your home screen provides the following options:

View Data — Provides a view only screen designed for viewing and printing. The quarter selected is highlighted and all text and narratives apply to the selected quarter.

Enter/Edit Data Allows data entry, edit, and certification (when Certification password is used).

Budget Change Budget Change requests are required when budget changes materially alter the outcomes of the grant or a line item on the budget summary is changed to or from zero. In the event that you change a line item from zero, you must have CCCCO approval before you make expenditures against that category. See Budget Change section for more information.

District Profile District contact information is stored in the district profile. All correspondence with a district regarding these reports uses information from the district profile. The profile should be updated quarterly or when personnel changes require updates. The District Profile information is also provided on the Certification screen

Logoff End this session. Users should Logoff when the computer is unattended or when long periods of inactivity will occur.

Input CBO Contact Information

You must input contact information for the Chief Business Officer; this is the person who will certify that the data submitted, particularly the expenditures, is accurate before it is submitted to the Chancellor's Office. You will not be able to proceed with data input until the CBO information is updated.

Update the CBO contact information by following the steps below:

1. From the Home Screen, select the District Profile button.

2. Enter the name, phone number, and email for the Chief Business Officer (see Figure 3).

3. If applicable, input the email address for someone to receive an email acknowledging receipt of the data or a copy of the CCCCO approval letter.

4. Select the Update button to save the changes.

Figure 3 – District Profile Screen [for Bakersfield College (with contact blacked out)]

Input Application Budget

After you have inputted the CBO's contact information, you need to input your college's application budget; this is the budget summary for the entire grant that you included in your application (note: you are not using the yearly budgets here). The database system needs this information in order to provide a cumulative total of funds spent as well as funds that remain.

Once inputted, the Application Budget will need to be certified (see page two) and approved by the Chancellor's Office.

Note: You will not be able to submit any quarterly report information until the Application Budget has been submitted, certified, and approved.

Input the Application Budget by following the steps below:

1. From your Home Screen, select Application Budget and then select Enter/Edit Data.

2. At the Application Budget screen (see Figure 4), enter the data from your Application Budget Summary into the column "2016-2017 Application Budget." You will not use the 2016-2017 Match column as there are no matching funds for this grant.

   Note: In order to minimize data entry errors, copy the budget numbers from the application budget summary and paste them into the database system.

3. Select Save/Update to save the changes.

Figure 4 – Application Budget Screen (for Bakersfield College). Note: The Certify button may not appear if the password you enter is for data entry mode only.

CALIFORNIA COMMUNITY COLLEGES
CHANCELLOR'S OFFICE

Basic Skills Student Outcome Transformation Program
YEAR-TO-DATE EXPENDITURES AND PROGRESS REPORT

(521) Bakersfield College

Grant Agreement No: 16-068-044   Total Grant Award: $1,500,000

(Enter dollar amount only - Rounded off to the nearest whole dollar)

Object of Expenditure	2016-2017 Application Budget	2016-2017 Match
1000 Instructional Salaries	0	
2000 Noninstructional Salaries	0	
3000 Employee Benefits	0	
4000 Supplies and Materials	0	
5000 Other Operating Exp. & Svs.	0	
6000 Capital Outlay	0	
7000 Other Outgo	0	
Total Direct Expenditures	0	
Indirect Expenditures*	0	
Total Expenditures	0	

*Indirect Expenditures are limited to 4% of the total expenditures.

Save/Update   Reset   Certify   Cancel

4. The CBO verifies the data is accurate and certifies the application budget.

5. The grant monitor at the Chancellor's Office verifies the data matches the college's Application Budget Summary and approves the budget as entered.

Input Quarterly Report Data

There are two parts to the Year-to-Date report: Expenditures and Progress. The expenditures section is where you input for the each line item dollar amount you have spent since the last report. The first column "Budget" reports the approved budget, the second column "Expenditure" reports year- to-date expenditures (cumulative), and the third column "Balance" reports unexpended balances relative to the approved total budget (automatically calculated – no entry is required). Report amounts by summary object code as defined by the California Community Colleges Budget and Accounting Manual.

The progress section is where you input your narrative describing the progress you have made on your Action Plan since the last report. You will only input data in the first two parts: "Summary of activities conducted during the quarter" and "Reasons for lack of progress towards attainment of program improvements."

The narrative can be created in a word processing software and copied into the appropriate narrative section. Each section is limited to 8,000 characters (including spaces) which is approximately one page of text. To check the number of characters in a MS Word document, select Tools and then Word Count.

Three buttons are available on the bottom of the "Enter/Edit" form: Save/Update, Reset, and Cancel. The function of each button is described below:

Save/Update button: Data entered can be saved at any time during the session by selecting the "Save/Update" button at the bottom of the page. Data that has been saved will appear when the account is accessed at a later time or date.

Reset button: Discards all changes since the last save, reloads data from the most recent save, and keeps the user in the "Edit/Update" form.

Cancel button: Discards all changes since the last save and returns to the Year-Quarter selection screen.

Remember: When inputting data, for security reasons, you must press the Save/Update button within 30 minutes of accessing the data entry page or your session will expire. Data entered since the last "Save" will be lost if the session expires. Each "Save/Update" resets the 30-minute timer.

Though you have already submitted your first quarterly report to the Chancellor's Office, you will need to input the data from that report before you can input the second quarterly report. This is necessary for the system to keep track of your cumulative expenses.

Input your first quarterly report by following these steps:

1. From the Home Screen, select Rpt Period I and then select Enter/Edit Data.

2. Once the form appears, you will see the expenditures section in the top half (as shown in Figure 5) and the progress section in the bottom half (as shown in Figure 6).

3. In the expenditure section, you will see budget column filled in with the data you submitted for the Application Budget. Input your expenditures for the quarter in the Expenditure column. Use the Mouse or Tab key to move from cell to cell.

   Note: In order to minimize data entry errors, copy these numbers from the submitted first quarterly report and paste them into the database system.

4. Halfway down the page, select whether your activities are being conducted as planned or not.

5. In the progress section, you only need to input data in "I. Summary of activities conducted during the quarter." Into this section, copy and paste the narrative submitted in the first quarterly report. If your narrative is longer than 8000 characters, you do not need to edit the response; instead, input "hard copy narrative submitted to the Chancellor's Office."

   Note: For future reports, you will need to submit a narrative for the parts one and two: the summary and the reasons for lack of progress; if you would like to do this for the first quarterly report, you can, but it is not required.

6. Select Save/Update.

7. The CBO verifies the data is accurate and certifies the application budget.

8. The grant monitor at the Chancellor's Office verifies the data matches the college's first quarterly report and approves the report as entered.

Figure 5—Expenditure Section (for Bakersfield College)

Figure 6—Progress Section (for Bakersfield College) Note: The Certify button may not appear if the password you enter is for data entry mode only.

Input your second quarterly report by following these steps*:

1. From the Home Screen, select Rpt Period 2 and then select Enter/Edit Data.

2. Once the form appears, enter your expenditures for the quarter in the Expenditure column. Use the Mouse or Tab key to move from cell to cell.

3. Select whether your activities are being conducted as planned or not.

4. In Part I, input a narrative that summarizes the activities conducted during the quarter.

5. In Part II, input a narrative that provides reasons for any lack of progress towards attainment of program improvements. If there is nothing to input here, simply input "progress is being made towards attainment of program improvements."

6. Select Save/Update.

7. The CBO verifies the data is accurate and certifies the application budget.

8. The grant monitor at the Chancellor's Office reviews and approves the report as submitted.

*If you already submitted your second quarterly report to the Chancellor's Office, follow

the steps listed on the previous page for inputting the first quarterly report. You may need to edit the narrative to fit the 8000-character limit, and you will need to submit answers for both Part I and Part II of the progress section.

Inputting subsequent quarterly reports:

Follow the same steps for inputting the second quarterly report, but you need to select the appropriate reporting period.

Certifying the Report

To certify the report, follow the steps below:

1. Log on to the system.
2. Select Application Budget or the appropriate reporting period.
3. Select the certify button at the bottom of the page.
4. Once the certify button is selected, the Certification screen (Figure 7) appears. Review (or update) the information presented for accuracy.
5. If the data is accurate, select the check box next to the certification paragraph to agree to the certification.
6. Select the "Submit" button to certify or the "Cancel" button to go back to the Home Screen.

> *Warning: Once a submission is certified, the data cannot be edited. If changes or updates are required after certification, contact Chantée Guiney, the grant monitor, at the Chancellor's Office.*

Figure 7—Certification Screen

View Data Option
__You can view your data at any time by following these steps__:

1. Once you have logged on, select the appropriate Program Year and Quarter.
2. Select the "View Data" button.
3. Once the form appears, the report can be viewed or printed. Scroll down to view the narrative entries for the selected quarter. The cancel button returns the user to the previous selection screen.

Printing a Copy of the Report
Once your data has been inputted, and the report has been certified and approved, you need to print a copy and send it to Chantée Guiney at the Chancellor's Office.

__To print the document, follow the steps below__:

1. Logon to the system.
2. Select the appropriate reporting period.
3. Select the "View Data" button.
4. Once the report appears, select the "Send to Printer" button.

We advise you to keep a copy of the approved report in your local audit file once you have received the approval email.

Budget Change Request
Budget Change requests are required if you add or remove a budget category from those listed in your application budget, or when budget changes materially affect the outcomes of the grant. Grant monitor approval is required prior to expenditures in any added categories. See the grant Legal Article I, Budget Change section for more information.

__Submit a budget change request by following these steps__:

1. Logon to the system.
2. At the Home Screen, select Budget Change.
3. Select Continue to proceed past the budget change request instructions page.
   Note: There are two errors on this information page. You do not need to submit a change request for out-of-state travel, and the system will automatically send an email to Chantée Guiney, the grant monitor at the Chancellor's Office.
4. Once the Budget Request appears (see Figure *), enter the new budget being requested for approval.
5. Provide an explanation of why the change is being requested
6. Select Save/Update to save your changes.
7. CBO reviews and certifies the request (see the previous page for instructions on certifying).

Figure 8—Budget Request Screen

When a budget change is completed and the certify button is pressed, an email is automatically sent to the grant monitor at the Chancellor's Office as notification of the request. Approval will be time stamped when the monitor approves the request.

> *Note: If you are adding a budget line item, you must receive approval for this change before accumulating expenditures for that line item.*

Once the grant monitor approves the budget change, an email will be generated automatically to all email accounts in the district profile notifying them of the approved budget change.

Budget Changes are effective once approved, so budget changes can only affect the next quarter report for the period when the request is approved. Budget Changes CANNOT be approved in arrears.