2015 PPR Refresher Webinar

October 8, 2015

Operator: Please stand by. We're about to begin. Good day and welcome to the PPR Refresher webinar. Today's event is being recorded. At this time, I would like to turn the webinar over to Whitney Marsland. Please go ahead ma'am.

Whitney Marsland: Hi everyone. Welcome to the 2015 Performance Progress Report Refresher webinar. I'm Whitney Marsland from ICF and I am joined here today by Andrew Kolly from OCS. Thanks for joining us for today's webinar and we hope this presentation will be useful for current grantees as a refresher for submitting your performance progress report or PPR for the April through September reporting period. In today's webinar, we'll also be discussing some of the recent changes to the OLDC system and the new indicator that was added to the PPR in 2014 and go over some helpful tips for submitting your PPRs.

The webinar will be recorded and you'll be able to access all the webinar materials on the PPR information page at the CEE Web site and we'll provide you with some information on how to access those materials at the end of today's presentation. We will be taking questions at the end of today's webinar and you can also submit a written question through the live meeting at any time during the presentation and we will do our best to answer all of your questions. So now I'll turn it over to Andrew to get us started.

Andrew Kolly: Thanks Whitney. Thank you to all of the grantees who have signed on. We're glad you could join us. My name is Andrew Kolly. I'm a program specialist here at OCS. I see a couple of my grantees have signed on but I just wanted to go over a little bit about what the presentation will talk about today. It's designed to be a refresher for grantees who already have a grant and they've already reported in the OLDC system but we just we do it every year and we want to just get it into everyone's mind again how to go through it.

So a few things that we're going to cover are we're going to review the purpose of the PPR and how it's used. We'll review the PPR timeline and provide important dates for the 2015 reporting process. We'll go over recent changes to the OLDC system. We're going to review general information about the PPR submission process.

We'll review the newest indicator added to the PPR. We'll provide some helpful tips that hopefully will make reporting for all of you easier and it'll let you avoid some of the common mistakes and errors. We'll also let you know where you can find additional resources and support so you'll be able to complete your PPR on time and submit a quality PPR.

Just as a reminder, the performance progress report, what we call the PPR, is the report that you're required to submit through what we call OLDC, which is the online data collection system. And you submit this report to provide information about the project for which you received a CED grant. The report is designed to provide a snapshot of how a project's doing, how many jobs it has created and as well as if any grantees need further assistance or clarifications on anything. The PPR also provides funders and OMB with aggregate data on the CED program and which allows us, OCS, to show the value and contributions that all the grantees are making.

The system also allows grantees to see previous reports so you can compare data, archive the reports for your own records and that's pretty much what the use of the PPR is. To do the actual walking through it, Whitney is going to help and I’m going to turn it back over to you Whitney.

Whitney Marsland: Great. Thanks Andrew. So to start today's presentation, we'll just go over some important dates. So you'll want to remember that you're required to complete and submit a PPR twice a year. So the dates are outlined on the slide that you see here and the six month reporting periods are from April 1 to September 29 and September 30 to March 31. So the OLDC reporting systems opens the first of October and you have one month to complete the report.

So you should remember to submit reports every October and April. Your report for the September 30, 2014 to March 31, 2015 reporting period should have been submitted by the end of April, 2015. The reporting system is now open for you to complete the next report for the April 1 to September 29, 2015 reporting period and this report is due at the end of October.

So before you begin that report that's due October 30, you'll want to make sure that your previous report, that was due back in April, is submitted and is in the status submission accepted by CO. If you being your current report without that previous report being approved, the baseline data will not populate correctly.

So if you have submitted your previous report and it hasn't been accepted yet by your program specialist, you'll want to email us at ocsregistar.icfi.com for instance on that. But do not start your current report until you receive some guidance from us about the status of your previous report.

So now we'll talk about the process of actually submitting your PPRs. So as you all know, we've already discussed that you can access the online data collection system to submit your PPR and you can access that at the URL that you see on your screen. We recommend that you bookmark this URL in your browser so that you're able to kind of easily return to it.

And one thing about OLDC is in order to access your PPR, you'll need to make sure that you've turned off any pop up blockers or select allow pop ups for this site because OLDC will not display your report if you have a pop up blocker activated for that browser.

So for those of you that have been using OLDC, there is a new feature that came about in the summer - this past summer. Some new enhancements were launched including a new home page. So you can activate this new home page that has the new features on the right side of the home screen and you'll select the switch home page link that's on the top right that you see outlined on your screen now.

You can do that to access the new enhanced home page or you can kind of continue using the older version of OLDC that as you have been in the past. This new enhanced home screen was created to improve some navigation and make OLDC a little bit easier to use but all of the basic functionality remains the same.

So just to kind of briefly go over some of the new home page features, there is something called the My Recent Activity tab that provides you with a list of kind of recent activities. You can easily navigate to PPRs that you've recently been working on.

There's also a new search box that allows you to kind of easily locate some information. And you're now able to sort some of your PPRs. So you can sort them in ascending and descending order so you can access the ones that you have most recently been working on.

A few other features, there's a due date column which provides the due date for some of your PPRs that will allow you to kind of easily identify when a PPR is due. And if a PPR is past due and not submitted, the word past due appear on your screen to kind of alert you that some action is needed for that particular report.

So those are some of the highlights of the enhanced home screen. You can access them by selecting that switch home page link on the right side of your screen as you see here or like I said you can use the OLDC as it is now.

And there are a number of resources that are available on the news and tips page in OLDC and that link is also highlighted on your screen now. There's a user guide and a frequently asked questions document to kind of walk you through how to use those new features.

So the first thing that we'll kind of talk about is accessing the user name and password. Like I said, most of you have already been using OLDC for awhile and may already have this information. But accessing log in information has been a common issue for grantees. So we'll go over a few tips in case you are encountering some difficulties with your user name or if you just forget your password.

So the first thing to do if you do not know your username and password is to check to your email for two emails from the online system. And this is for some newer grantees. When you first become a grantee you'll receive emails from OLDC and one will contain your username and the second will be - will have your password in it.

And sometimes grantees have - don't receive those emails because it goes to your spam or junk folders because it's automated email system. So if you don't receive that email, you'll also want to check those folders to make sure that wasn't there.

And then just to make sure that you receive future emails in the schematic we suggest that you add it to your email contacts so it doesn't route the email to those spam folders. And if you've - if you don't receive these emails or if you've just - you've been a grantee for awhile and you just forgot your password you can always email us at ocsregistrar@icfi.com and we can provide you with your username and reset your password for you.

So once you are able to log in to the system and you can begin working on your report, you'll notice that your PPR goes through a variety of different stages. As you working on the report and you've probably become familiar with these stages from submitting some reports in the past.

A common issue that we run into with grantees is that they believe that they have successfully submitted their report when in fact they may have entered in all the information but have not completed all the necessary steps that allow the program specialist to actually review and approve it.

So we'll review these stages now because it's important for you to be able to check on the status of your report and know whether you have successfully submitted a report or if it requires a few more steps to be able to submit it and your program specialist be able to review it. So the first stage is the initialized stage, which means that you have accessed your report at least once but you may not have entered any information into the report itself.

The next stage is the save stage and that means that you've entered some or all of the data in your report and you selected save at one point. So this is the stage that'll be in while you're working in entering in the information and hitting save along the way.

The next stage is validating and this means that you have entered some or all of your data into the report and clicked validate and validate checks your data for any mathematical errors or errors in the system. The next stage is certified, which means that you have completed adding data to your report.

And a lot of times people confuse certified with submitted and being in the status certified does not mean your report is submitted. You actually have to still click the submit button in order for your program specialist to be able to see the report in the system. And then once your report is in the submitted status, it means that you have completed the report and selected that submit button and your program specialist can see it.

If you have successfully submitted your report, you also might be in the status submitted with warning. And this means that your program specialist is able to access the report but the system has identified a mismatch between your report data and some of the validations. So it can be submitted but if you do get this status and you're a little bit unclear about why you got a warning, you can email us at ocsregistar and we can look over the report for you.

And if your report is in submission in review by CO that means that you've submitted the report and it is currently being reviewed by your program specialist. And then submission accepted by CO means that your report has been accepted by your program specialist.

If the report is accepted, you'll get notified via email that the report is accepted and then there will be no further action for you on that report until the next reporting period. And then the next stage that we'll talk about a little bit later in the presentation as well is submission return by CO and this means that your program specialist has reviewed your PPR but they might have noticed where something needed a little bit more clarification or they want you to make some edits before they're actually able to accept it.

So you'll be notified through email from the online system that your PPR is returned and then your program specialist will send you an additional email kind of clarifying where you need to make edits and add more information. And then once the changes - you can make those changes in the system and resubmit your PPR in OLDC and a little bit later we'll kind of walk you through how to do that.

So if you're unaware of what stage your report is in, you can always check using the timeline kind of the top of each of your report. So that's kind of what's highlighted on your screen here. So in this example, this report is in the save status. So it's been initialized and saved. So since all of the information may be entered in this report, this grantee might mistakenly believe that they completed and submitted the report but if you remember from the stages we just went over save does not mean it's submitted and this grantee must validate, certify and submit to the program specialist before they are notified that it is ready to be reviewed.

So now I'll briefly review the step that you take to locate and begin completing your report form. I know that this is probably a review for all or most of you. But from that secure sign in page that we showed you at the beginning of the presentation, you will select OLDC and then report form entry in the new window.

And then you can select your program name and if you have multiple grants, you'll want to try selecting the one in the drop down box with the highest two digit number at the end and those numbers indicate what is the most recent report.

And then you can confirm that you've selected the correct grant by checking the grant number on the next screen. Then you can choose your funding and grant period and reporting period and select new edit revise report in order to actually make edits in the system.

Once you do access your report, it consists of a cover page and three additional forms. So the cover page collects some basic information about your program like the name of your organization and your address.

And form A is called the performance measure section and this is where you record the quantitative performance data about your program, so things like the number of positions and businesses created. The second form is form B. It's called the program indicators and this is where you will record some qualitative data about your program.

It provides you with a place to discuss any changes or successes or challenges around your project in greater detail than form A. And the final form is form E. It's called the activity basic expenditures form and this is where you will provide some financial data about your grant.

So that was kind of just a quick overview of the process and if you would like a more detailed review of the process for completing your PPR in OLDC, we encourage you to watch the webinars and review the resources on the new PPR information page of the CED web page.

So for those of you that are familiar with the older version of the PPR information page, you'll see that the page on your screen looks a little bit different but it contains all the same information. And we'll provide some instructions on accessing these materials at the end of the webinar today.

And in addition to this webinar, we strongly encourage you to review the Submitting a High Quality PPR webinar which provides some tips and guidance for completing high quality PPRs and highlights some key details that really must be included in order for them to be approved by program specialists. And it goes a little bit deeper into what should actually be included in the PPR. So definitely check that out as you are submitting your PPRs this month.

And some of you, your grants are - have ended in 2015 and you are in addition to submitting your PPRs this month you also need to submit a final report for your grant. So if your grant ended on September 29, 2015, your last PPR will be due October 30.

And this is for all grants with this end date. And if you are fairly confident that your data will not change after you submit this report at the end of October, you can mark your last PPR that you submit as your final report. Then you will not need to submit an additional final report for that grant.

But if you do anticipate that your data might change between the end of October and the end of December when the final reports are due, so if you anticipate that more jobs may be created and you want to capture that in your PPR, you can submit your PPR - your last PPR October 30 and then you can create a revised version of that report in OLDC in December to capture that data for your final report.

So like I said, this revision is due December 30 and you will mark this version as final. And in this version, you won't have to complete the PPR from scratch. You'll only be required to modify the original report to reflect the changes that occurred after October 30. So that is kind of a brief overview of what the steps are for the final report, but we will be providing more guidance on that as the due date nears and there's also a submitting your final report webinar on that PPR information page we just showed you and that is a good reference to refer to as you are submitting your final reports based on which option you want to choose to do that.

And when you go to mark your report as final, you'll do this on the grantee information and certification page, which we refer to as the cover page. So it's that first form that we have pointed to on your screen.

And from the report section screen, from that drop down, you'll select edit section, which will open up the cover page once you select the blue go button. And then this on the screen now is the cover page and you'll see circled is the final report section.

And if you want to mark your last PPR as your final report or if you want to submit that revision, this is where you will indicate that yes this is your final report. And like I said, for more kind of step by step in depth guidance, you'll want to watch that final report webinar that is available on the PPR information page.

So now we'll go into what we call the data collection tool, which many of you are probably already using or are familiar with. The data collection tool tracks your project's data throughout the year. And it makes it easier for any grantee to kind of collect all the data they would need to fill out for form A of the PPR.

Using this tool has a few different benefits. In the upcoming report period, it will simplify filling out form A by doing the calculations for you. So moving forward, spending time entering data into the data collection tool throughout the year will save a lot of time when it comes to completing the PPR.

And not only does it collect the data that you need, the data collection tool also presents it in exactly the format you need to enter into form A in the online system. So it helps minimize errors by collecting the indicators for you as you enter information over the life of your project and it will keep a record of what you have submitted.

So as long as you're using this tool to update your records on a regular basis, submitting the semiannual PPR could be as easy as selecting the reporting period from a drop down box, copying the data from the tool and pasting it into the online form. So this can kind of free up some of your time to be able to spend more time kind of telling the story of your grant in the qualitative section, like form B.

So if you have been using the data collection tool, which we hope a lot of you have throughout the course of your grant, then all of the information you need to complete form A of the PPR will be collected in the final tab of the data collection tool.

And if you're not using the data collection tool currently, we really strong encourage you to start. And the tool is available for you to download. It's an Excel spreadsheet and that is also available on the PPR information page. There is a yellow exclamation point on the file that will show up when you open it and that means that the data collection tool is a macro enabled workbook. Some people think that when they see that that there's something wrong with the file but it's not.

It's just kind of notifying you that it is macro enabled. So don't worry if you see that. That message is not an error message. So as you kind of use the data collection tool or if you are not familiar with it and you want to start, definitely let us know and send us an email at ocsregistrar and we can kind of walk you through how to use it.

So like I said if you have been using the data collection tool the final tab is where you find all the information you need to fill out that form A in the online system. So you can kind of go through and enter all of your information in the previous tabs of the tool and then in the final tab you'll select the reporting period from the drop down box.

So if you have filled out the previous tab, the number in the PPR, then this tab will be updated and you're ready to submit your forms to OCS. So you can kind of just copy the numbers you see in this tab directly into the form in form A like you see on your screen here.

But keep in mind that just because you've selected the reporting period on this tool and clicked the final as your record button it doesn't mean that your form has been submitted to OCS. You still need to actually copy the numbers that you entered into the data collection tool into form A. The data collection tool is separate from the online system and it only captures information for form A. So you'll still need to go into the online system and complete forms B and E.

One thing to also note about the data collection, especially this tab, is that it's critical that you select the correct reporting period dates in the drop down box. If you accidentally select an earlier reporting period and click the finalize button, it will overwrite your old record. So there is a warning that comes up if you are about to overwrite something.

So if you get that warning message, just make sure that you have the correct date selected so you don't accidentally overwrite something that you've already finalized. And also you want to wait to click the finalize your records button until after you have submitted your forms online and are sure you're not going to make any additional changes because this button will populate your records tab.

You can track what you've submitted over time. So you want to make sure that you don't hit the click your finalize record version until you've entered that exact information in the online system as well.

The data collection tool is a tool to kind of collect your data over time and make it a little bit easier when reporting comes around and it's a nice tool that you can kind of save on your computer that's for your records that you can kind of keep track of the progress of your grant. And then what's nice about this as well is you can continue to use the same Excel spreadsheet for the next reporting period. So you can use the same tool for the life of an entire grant.

So the PPR's mission process is the same as it has been in previous years. So hopefully what we just kind of quickly reviewed did sound familiar to all or most of you. And now we'll go over a new indicator that was added last year to form A of the PPR and you were asked to report on this indicator the past two reporting periods.

But it is still a new feature on the PPR, so we just want to review it with you now. So prior to the April 2014 to September 2014 reporting period, form A of the PPR only counted the number of positions created for low income individuals. And this is because the focus of the CED program is on the creation of jobs for low income individuals and a pretty significant 75% of all the jobs that you create are required to be filled by low income individuals.

So this information is captured in the job creation indicators A05J through A12J, specifically indicator A06J which asks for the number of total full time positions created for low income individuals. There was no specific indicator to capture the number of jobs created for all individuals. So if jobs were created for both low income and no - non-low income individuals, grantees were asked to elaborate on that information and the number of positions created for both low income and non-low income individuals in form B. There is no indicator to present this in form A.

So the new indicator that's been added to form A of the PPR asks for the total number of positions created with CED funds including jobs created for non-low income people. And the reason that this indicator was added was to ensure that you receive credit for all jobs created for your grants. So like I said, the focus on job creation for low income individuals is crucial to the CED program and the success of your grant but OCS is still interested in the full impact of your CED projects and the impact that they're making in your communities and this includes the jobs created for both low income and non-low income community residents.

So that new indicator as you see in your screen is A00J which asks the total number of positions created for low income and non-low income people. It is important to note that this indicator is the only indicator that asks for information on non-low income individuals in the PPR. All other indicators on form A are specific to positions filled by low income people and you will continue the report on positions created exclusively for low income individuals for the existing indicators in form A as you have for all other reporting periods.

So as you see in your slide here, the new indicator that counts all full time positions created appears just above the existing job creation indicators which are A05J through A12J. We just want to clarify the difference between the existing job creation indicator 06J and the new indicator because they are very similar. Both ask for full time positions created. However, the difference is the new indicator A00J asks for the total number of full time positions created for both low income and non-low income people. And the existing indicator A06J is only interested in full time positions filled by low income people.

So this number entered in A00J, the new indicator, will always be the highest number in the actual to date column from the job creation indicators. So for some of your grants, this number will be the same as the total number of full time positions created for low income individuals. So that's indicator 06J meaning that all jobs created with grant funds were filled by low income people. So on your slide, this is kind of articulated in scenario one where 100 full time jobs were filled by low income individuals and zero positions were filled by non-low income individuals. So the number entered in the actual to date column for A00J would be 100 and the number entered in A06J would also be 100.

However, for most grants the total number of full time positions created for both low income and non-low income will be higher than full time positions filled exclusively by low income people. Often when a business is created or expanded there is a need to hire some high level managers or other content experts with some unique skills and experiences that may be more difficult to identify and recruit. So this is why only 75% of positions are required to be filled by low income people.

So as an example, maybe your grant created 100 total full time jobs for low income individuals and an additional 20 jobs for non-low income individuals. And if this is the case in the actual to date column, you would enter 120 for A00J and 100 for A06J. And this is illustrated in scenario two on your slide. But in all cases, just keep in mind that indicator A00J will be greater to or equal than indicator A06. And there are validation checks in OLDC to ensure that this is true. So if you get any error message regarding these two indicators, you can look in the system and it will kind of explain why you're getting that error.

So that's the new indicator and for those of you using the data collection tool that we discussed a few minutes ago, you'll have noticed that this new indicator is not in the data collection tool and this is because like I mentioned the data collection tool is designed to collect only information on jobs created for low income people.

So we want you to continue using the tool as you have been and only entering data that pertains to low income individuals. You will still need to track the positions created for non-low income individuals in that new indicator but you'll need to do that using a different method, so outside of the data collection tool.

And then when you're using the data collection tool to input your data in OLDC, you'll just need to pay special attention to ensure that you are entering in the data and the actual to date column for the correct indicator since as you see on your screen the data collection tool now looks slightly different than form A in OLDC. So just keep in mind that the data collection tool does not include that new indicator and it's strictly for information on low income individuals.

So now we're going to go through some helpful tips, some common questions that come up when people are submitting their PPRs. And as we've mentioned throughout this presentation, the PPR help desk is always available to assist you in doing anything related to your PPRs. And we see a lot of the same questions that come through. So now we will kind of go through some of those common questions that we've seen come up a lot. And if you have any other questions then feel free to kind of ask them through Live Meeting or we can open up the phones at the end of the presentations.

So first it is very important that you complete your report for the correct reporting period. If you do not, there is no way to change the reporting period and you will need to reenter the information for the correct reporting period, which is kind of like an extra step that you definitely don't want to have to take. So to avoid this problem, you'll want to be sure to select the radio button next to the dates, April 2015 through September 2015 as shown on this screen when you submit your reports for this reporting period.

And this is something we've mentioned at the beginning of this presentation as well but when you're selecting the correct reporting period, it's also very important to check the status of your previous report. So before you begin your current report, you'll want to confirm that your previous report has been submitted to your program specialist and that the report has been accepted. And this is again why it is so important for you to really understand the report stages that were reviewed earlier because if you begin your report before your previous report is in the submission accepted by CO status, the baseline data will not populate correctly for your current report. And to correct that error like we said, you do have to go through and enter in the information again.

And if your previous report has a status anything other than submission accepted by CO you'll want to email us at the ocsregistrar@icfi.com. So you should - the - like you see on your screen, the previous report has submission accepted by CO. So this person can go ahead and report but if the status is anything else you definitely want to contact us and do not begin your report for the current reporting period until this issue is resolved and your previous report is accepted.

Another thing that comes up a lot is the changing of your grant administrator. So you may find over the course of your project that you need to update the person that is indicated as the grant administrator in OLDC. So if that person has changed or is listed incorrectly in OLDC you'll need to submit a request to the OCS registrar with the new grant administrator's information. So the information that we would need as outlined on this slide and then we can create a new user name for the person at your organization who is now responsible for your grant. And whenever a change like this occurs you also want to make sure that your OCS program specialist is aware of this change.

So as you're reporting, you might also find that you need a bit of a refresher on some of the definitions of some of the indicators on form A. So we'll review now a few that have produced some questions in the past. So first we'll discuss the reporting of low income individuals hired or retained which are indicators A15, A21 and A22 on form A. These indicators measure the total number of low income individuals who are employed in a job created with CED funds.

So A15 asks you to report on the total number of low income individuals ever hired with a CED grant. A21 asks you to provide the total number of low income individuals who were hired into a CED created full time position at least six months ago. It does not include those who were hired within the past six months. And A22 asks you to report on the total number of low income individuals who retain their full time job for at least six consecutive months. So for this indicator it does not include those who retain their jobs for less than six months. So we know that that can be a bit confusing. So a good way to think about these three indicators is as an inverted pyramid as you see on your screen.

So remember that the number you report in indicator A15 should include all low income individuals ever hired with your CED grant. Indicator A21, which is the number of low income individuals that were hired at least six months ago, will be kind of a subset of that total number of low income individuals ever hired as you reported in indicator A15. And then of the number of low income individuals hired at least six months ago, which is indicator A21, a subset will have retained their jobs for at least six months. And this number will be reported as indicator A22. So this pyramid like you see on your screen is a good way to think about several other of the groups of indicators as well, including the number of businesses created, the number of positions created and the number of ((inaudible)) recipients hired.

So I have a few more tips but I also wanted to kind of open it up for questions now. You can submit your questions through the Live Meeting or you can ask a question over the phone by pressing star one on your phone. So if you do have a question about anything that we've covered so far in the presentation, definitely call in by pressing star one and we can talk about them now. And we'll also be opening up the line at the end of the call. So feel free to ask now or you can save your questions for a little bit later. So operator does anyone have a question on the line at this point?

Operator: Yes. We had a couple come in. We'll go to our first questioner.

Deborah Taylor: My name is Deborah Taylor. I'm with LAO Family Community Development. I have a question regarding A15. The one word that I had not seen on the report in the past was the word ever hired. And I wanted to know is that something new? Or maybe that was the intention because my report simply reads the number of, you know, low income positions created - employed in low income individuals in positions created.

Whitney Marsland: Yes. I don't believe that the word ever is on the form in the online data collection system but that was kind of the intention of the indicator to basically say this indicator, A15, should include the total number of low income people that were hired throughout the course of the entire grant the entire time. So I guess a good example for why that - we kind of clarified using that word is that if an employee was hired and then they ended up leaving in a year. We still want to count that individual as being employed at one point in that position.

Deborah Taylor: Great. Thank you.

Operator: And we'll go to our next questioner.

(Jimmy Chan): Hi this is (Jimmy Chan). I just wanted to know you said that there will be a copy of this presentation that you guys will send out to us after the call. Is that correct?

Whitney Marsland: Yes that's correct. So we'll send an email once it's available. It usually takes about a week with instructions on where it's posted and how you can access it.

(Jimmy Chan): Okay. Thank you.

Whitney Marsland: You're welcome.

Operator: And we have no other questions at this time.

Whitney Marsland: Okay. So I will continue going through the tips and as you have questions, we will address them again at the end of the call. So the next group of indicators I want to cover have to do with leveraging and these are indicators A25 through A29. So leveraging is not a requirement of your CED grant. Tracking this information allows us to show how organizations are able to utilize CED funds to attract other financing to help create jobs and build up their communities. And we use this information to demonstrate to Congress, partners and other stakeholders that the CED funds grantees receive can grow and be put back into the community.

So these five indicators related to leveraging on form A measure the amount of money leveraged through any non-CED scores. So indicators A26 through A29 ask you to report on how many dollars your project has leveraged from government funds, the private sector, loans and other sources. So all of the leveraged funds you report in indicators A26 through A29 will add up to the total dollars your project has leveraged. And this total will be automatically populated in indicator A25. So the online data collection system does that total for you. If no funds were leveraged, you can enter zero in these fields and just provide a brief explanation in column seven that indicates that no funds were leveraged. You can also use indicator B09 in form B, which is kind of the qualitative piece, to provide a little bit more details about the funds that you leveraged as a result of CED funds.

The next tip is about something that we touched on earlier with some validation errors and warnings. And like I mentioned, reports can be submitted with warnings. However, errors must be resolved before a report is submitted. So you might receive an error message if you leave a field blank or if you indicate zero in form A but don't provide an explanation. So those are error messages that you won't be able to move forward from. And the other errors examples are on this slide now. So you will have to kind of correct those before you're able to submit. And any warning and error messages will appear at the top of the form that once you have selected that validated button and they provide you with some explanation for how to resolve those error messages so that you're able to submit.

So the next one I want to talk about is editing a return PPR. So this is a question that has come up a lot recently. And we talked about this briefly in the beginning that in some cases your program specialist may reject a submitted PPR because the PPR is lacking some detail or if the program specialist needs some clarification on the information provided in that report. And if your report is returned by your program specialist, you'll receive an email from the automated system kind of notifying you that that action has been taken in the system. And then your program specialist will send you a separate email directly that outlines the specific information that you need to edit or clarify or anything that needs to be added to the PPR in order for it to be accepted.

So we've been getting a lot of questions about how to edit the report once it is returned by the program specialist. And to do this, you'll need to un-submit the report. And this is outlined on the slide that you see on your screen now. It's the blue un-submit button under the report action screen. And to do this, you'll navigate to the report form status page and you will select that un-submit button. And after you select the button, you'll receive a message just kind of clarifying that you definitely want to un-submit the report and you will select yes. And then you'll be able to make that edit. So after you un-submit the report, the next step is you need to un-certify the report. And to do this, you'll do it on the report sections page and there's a button called un-certify. So that's the button that you see outlined in red on your screen now. And once your report is un-submitted and un-certified, you will be able to edit the report and make the changes requested by your program specialist and re-submit.

So we hope that this was a good kind of overview of the PPR submission process and that it was helpful to you as you begin submitting your PPRs. And we also want to highlight some additional resources and places you should go for some assistance that we've kind of been mentioning through the report. And that is the performance progress report information page. And this is kind of your first go to place if you want to locate some resources and webinars about submitting your PPR and OLDC. The PPR information page was previously available on the OCS community development site but it is now available on the ACF Web site. So it's all the same resources and information just on a new web page with a little bit of a different look and a different URL.

The new PPR page is very easy to use but if you have any questions about how to access the new page and new resources, you can contact us at ocsregistrar@icfi.com. So like I said this can be accessed at the URL you see here. And some of the useful resources on this page is there's a frequently asked questions document. There's some sample forms and instructions for how to use the PPR. The data collection tool is available there that we mentioned in some instruction documents on how to use that. There is a number of different user guides and there's a lot of past webinars that are really helpful to use when you're going through and submitting your PPR.

And if for some reason you don't find what you're looking for on the PPR information page and you have very specific questions, feel free to contact your program specialist or us at the PPR help desk. So the program specialist will be able to provide you with some general grant assistance and guidance. So they're a really good resource for questions because they can refer you to the right people and kind of help you make sense of issues you're encountering. And the PPR help desk is available to provide some technical assistance for reporting and using the PPR. So you can email the OCS registrar with questions related to reporting for your grant.

So now we'd like to open up the phone for questions, again any other questions that you have and you can also submit your questions through the Live Meeting, a written question. But as a reminder, you can enter a question - submit a question on the phone by pressing star one. So we'll give you guys a few minutes to submit those questions. And while we're waiting for some questions to come in, I just wanted to remind everyone that we are having another webinar, October 22, and it's about CDFI funding for CED and CED HFI projects. So this webinar will take place on Thursday, October 22 from 2:00 to 3:00 pm and if you haven't already registered for this webinar or you want a little bit more information about what the webinar will be about, you can email us at ocsregistrar@icfi.com. So operator are there any questions on the line?

Operator: Yes. We'll go to our first questioner.

Liberty Merrill: Hi. This is Liberty Merrill. We've run into an issue in the PPR where we had had positions that had ended because we're working with micro enterprises and there were a couple of businesses that were no longer operating. And the - on form A it would give us a number, you know, because we put in the date that it had ended. On form A it would give us one number for the number of total positions. When we tried to input that into the PPR system, it kicked back an error saying that we couldn't be less than our baseline, the baseline being the number from our last PPR.

Whitney Marsland: So it sounds like you were entering some information in the data collection tool first before entering in the PPR. Is that correct?

Liberty Merrill: Yes. Yes.

Whitney Marsland: Okay. So they have those kind of features of being able to enter the start and end date in the data collection tool and what you want to keep in mind when entering those numbers into the PPR is that the baseline number can never be greater to the - than the actual to date number. So that's why it's really important to kind of make sure that all of the data that you enter into that data collection tool makes sense because even - so you want to capture in that actual date column every position that you created to date. So even if five of those positions ended, you still want that actual to date column to reflect all of the jobs. So if you created ten jobs last reporting period and this reporting two of those jobs ended, you still want to enter ten jobs as actually to date rather than eight because we want to capture every job you've created over time even if some of those jobs have ended. So if you're having some trouble with getting the data that you enter in the data collection tool to reflect that, then definitely email us at OCS registrar and we can try and help you with that. But the actual to date column should always be greater than the baseline.

Liberty Merrill: Okay. Thank you.

Operator: And we have no other questions on the phone.

Whitney Marsland: Okay. So if there's no other questions, we can kind of wrap up today's presentation. So thank you all for joining us and for all of your questions over the phone. And I know that some of you have created - have submitted some questions through the Live Meeting as well. So we hope that we were able to answer all of those. And if for some reason we didn’t get to your question or you have a follow-up question after this call, email us at OCS registrar and we will be - we would be happy to answer those after the call and we'll send an email with the instructions on how to access this recording and the PowerPoint slides within the next few days. So thanks everyone for joining us and we appreciate you participating.

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