PPR DATA COLLECTION TOOL

INSTRUCTIONS FOR ENTERING DATA

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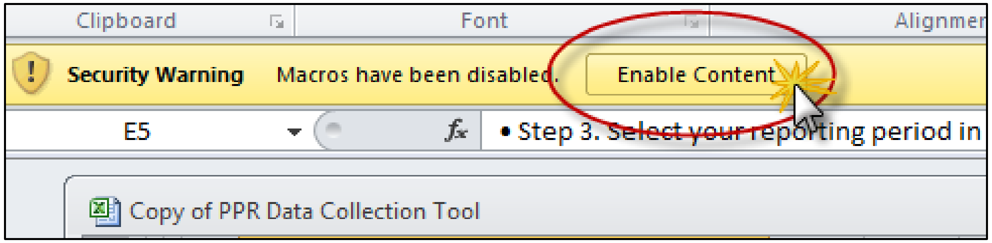
THE PPR DATA COLLECTION TOOL

- The Data Collection Tool was designed to help CED and JOLI grantees collect all of the information needed for Form A of the Performance Progress Report over the course of the grant period.
- Once the project data has been entered and updated, a version of PPR Form A will be populated and the numbers from the form can be entered into the On-Line Data Collection System (OLDC).
- The PPR will need to be completed and submitted through the online system by October 31 and April 30 during each year of your grant.
- The PPR includes three forms: Form A, Form B and Form E.

ACCESSING THE DATA COLLECTION TOOL

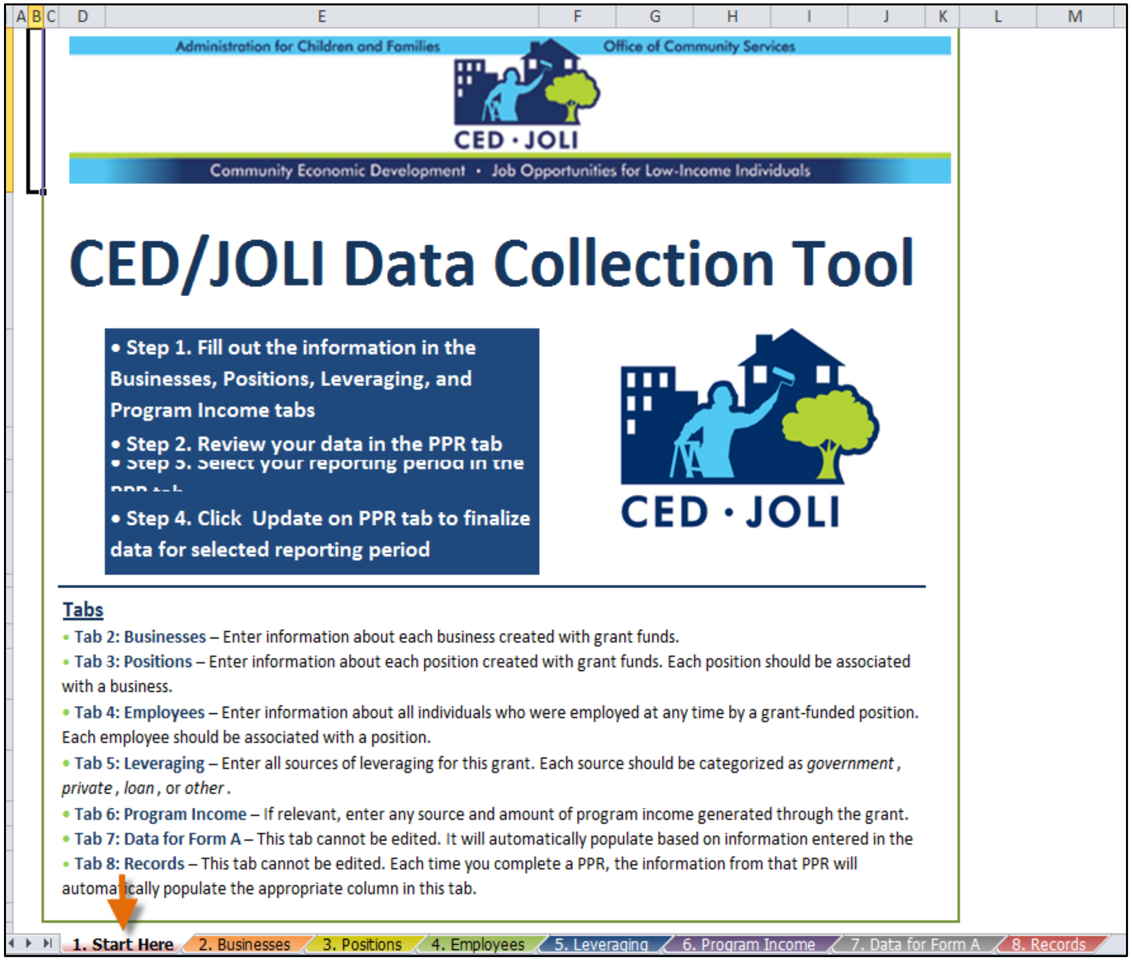
- The tool is in Excel 2007-10 format. If you have an earlier version of Excel, you need to download the free compatibility pack from the Microsoft website. It is available here: http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=3
- When you open the tool, you must enable macros in order for it to work properly. In order to do this, find the security warning that states macros have been disabled at the top of the Excel window. Click the button than enables this content.



- Depending on which version of Excel you are using, you will see different text in the warning message and enable button.

KEY TIPS FOR ENTERING DATA

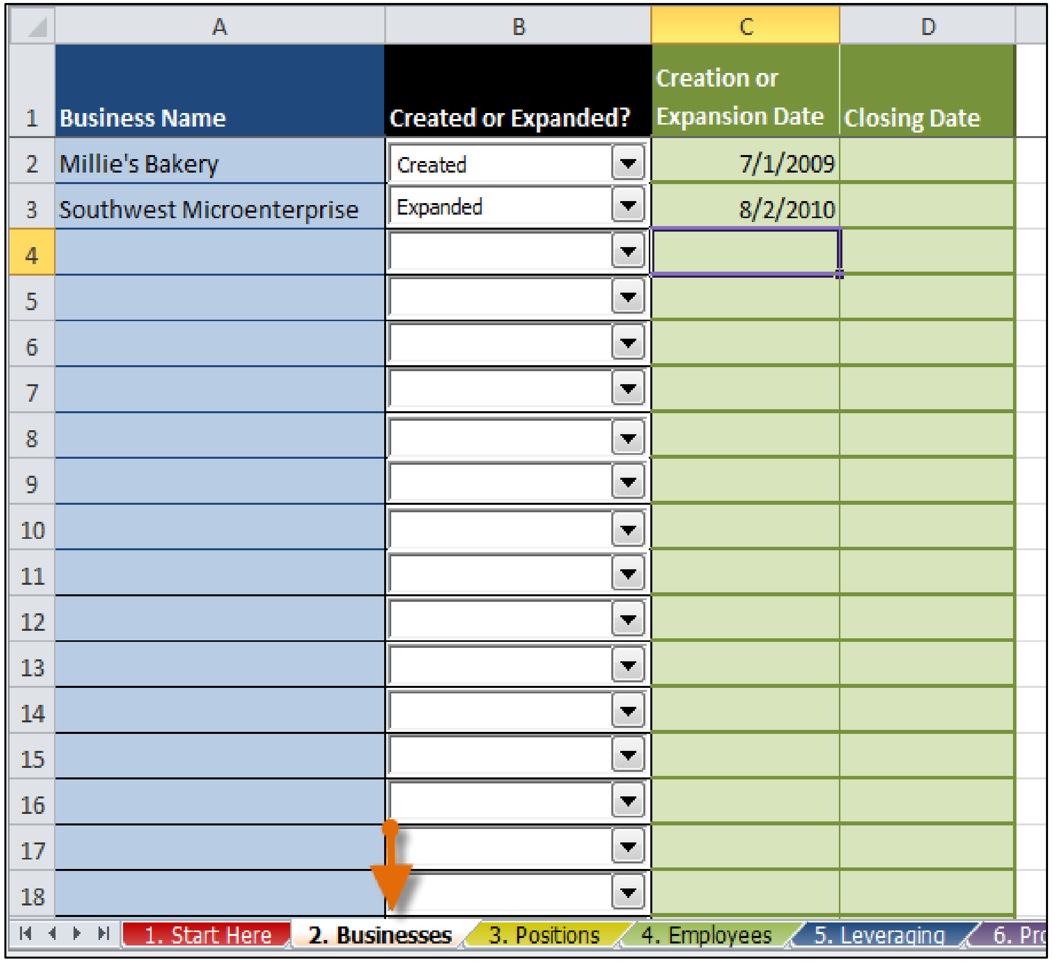
- This tool will help you complete Form A by simplifying data entry, breaking down indicators and completing calculations for you.
- For the tool to work correctly, you must complete all information it requires.
- Using the data collection tool is not a requirement, but rather a tool to help you complete the PPR.
- You must copy the numbers from this tool into the online system to fulfill the reporting requirement each that period.
- Be sure to save the workbook and continue to update the same version over time.
- The PPR data collection tool has eight tabs at the bottom of the screen. All entries must be entered continuously down the rows. Do not skip rows.
- You must complete the tabs in the tool in order from left to right. Successive tabs will use information from prior tabs to autopopulate fields.
- To delete a selection from a dropdown box, use the arrow keys on your keyboard to navigate to the cell with the dropdown menu. Hit the 'Delete' button on your keyboard. Do **not** use the 'Backspace' button.



The first tab of the tool provides instructions and explanations for the rest of the tabs. No data entry is required in this tab.

- All 8 tabs are listed at the bottom of the screen – Select the appropriate tab to progress through the tool
- You <u>must</u> proceed through tabs in numerical order

1. START HERE

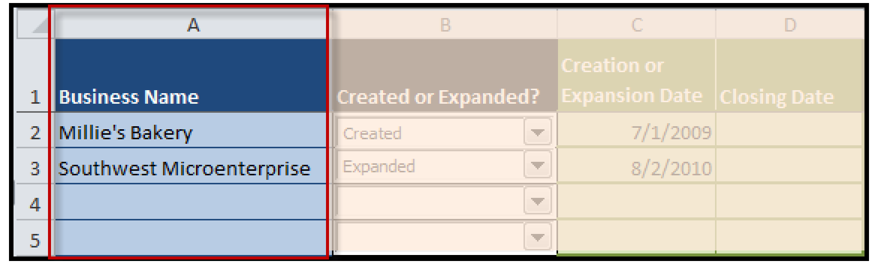


The second tab of the tool is labeled 'Businesses'. This is where you will keep track of all the businesses you help create or expand.

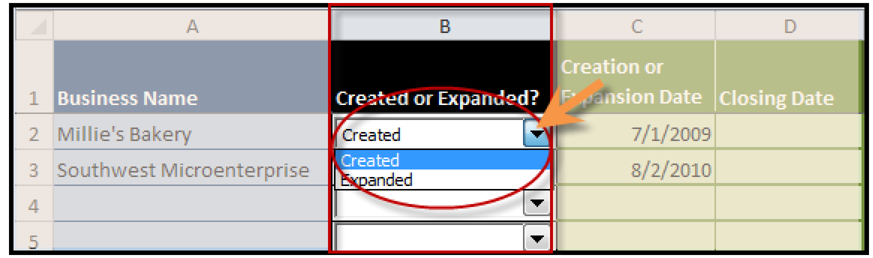
- All businesses should be entered continuously down the rows. Do **not** skip rows.
- Make sure to account for *all businesses* in which jobs were created with your grant.
- For those working with **microenterprises** or **self-employment**, each microenterprise or self-employment operation should be considered a business.
- For **revolving loan funds**, any business that you helped to create through the revolving loan fund should be counted as a business created — and any existing business that used funds from the revolving loan fund to expand should be counted as a business expanded.

2. BUSINESSES

1. Enter the name of the first business created or expanded in the first blank cell in the first column (cell A2). Be specific about the business name, as this name will be vital to entering additional data as you progress through the tool.

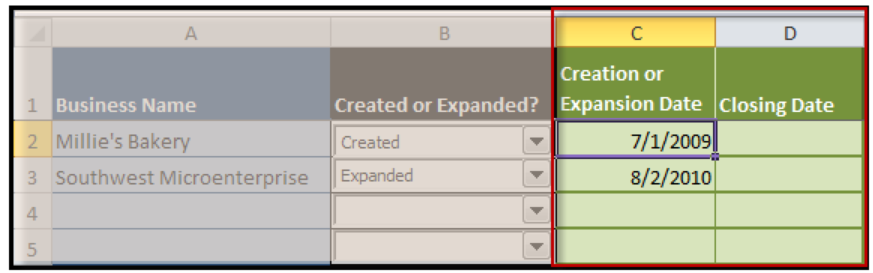


2. In the second column, identify whether the business was created or expanded by selecting ‘Created’ or ‘Expanded’ from the drop down menu. You must select one.
   To select from the dropdown, click on the downward facing arrow. Select the appropriate option from the list.



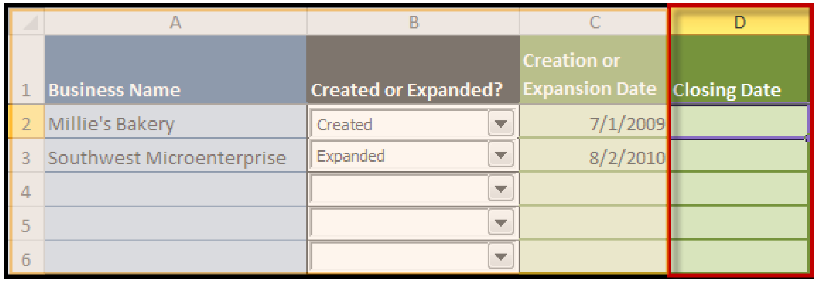
3. In the next column, enter the date of Creation or Expansion for the listed business. The Creation or Expansion Date (Column C) should be the day the first employee started working — not necessarily the day the business opened to the public. In the case of expanding an existing business, this date should be the first day that an employee *hired through OCS funds* worked at the business.

   Be sure to enter the exact date in month/day/year format.



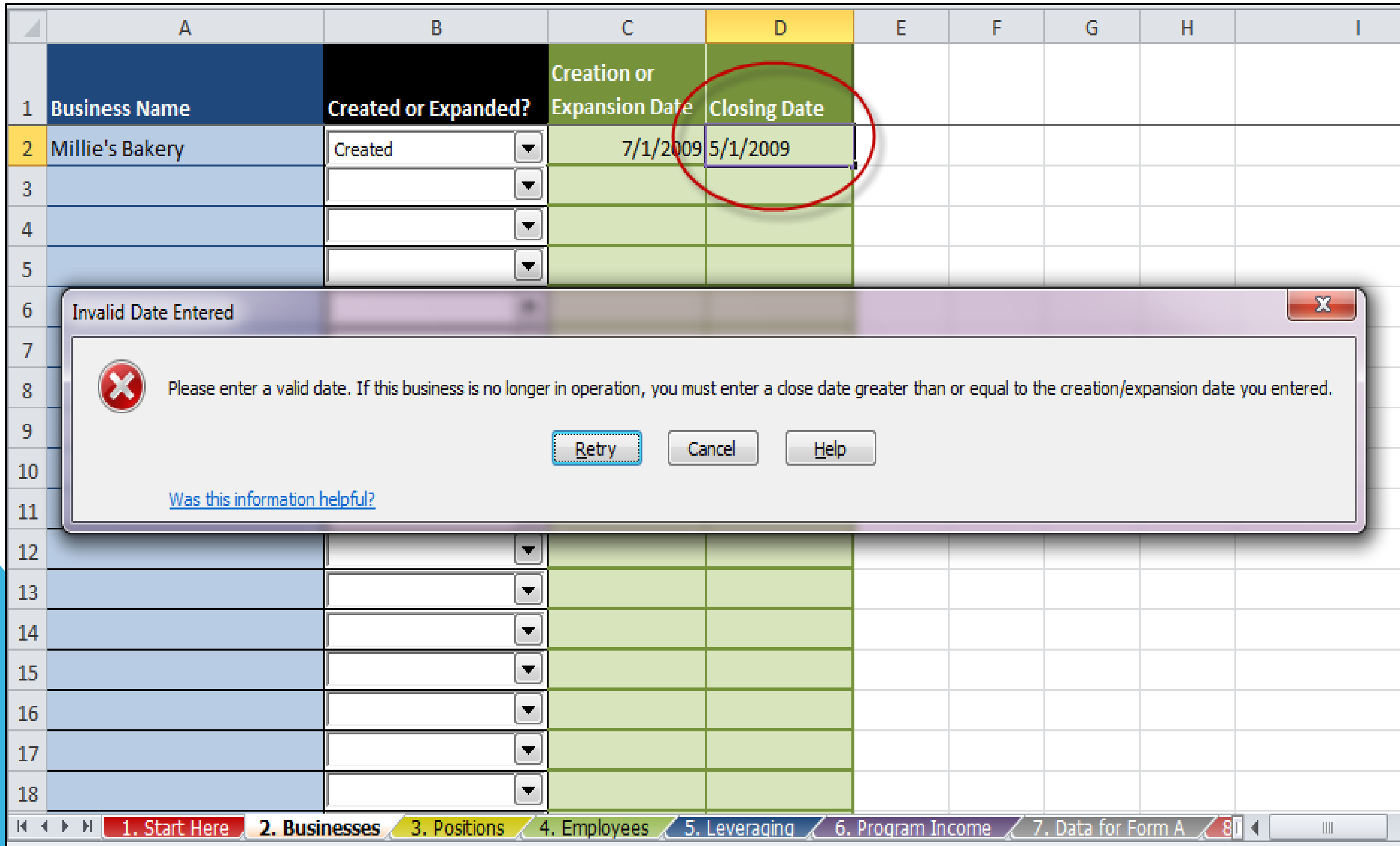
2. BUSINESSES CONT.

4. The Closing Date (Column D) should be entered only if the business is no longer open and no longer has any employees. This is the date that the business has no employees. If the business. If the business is still open, leave this field blank.



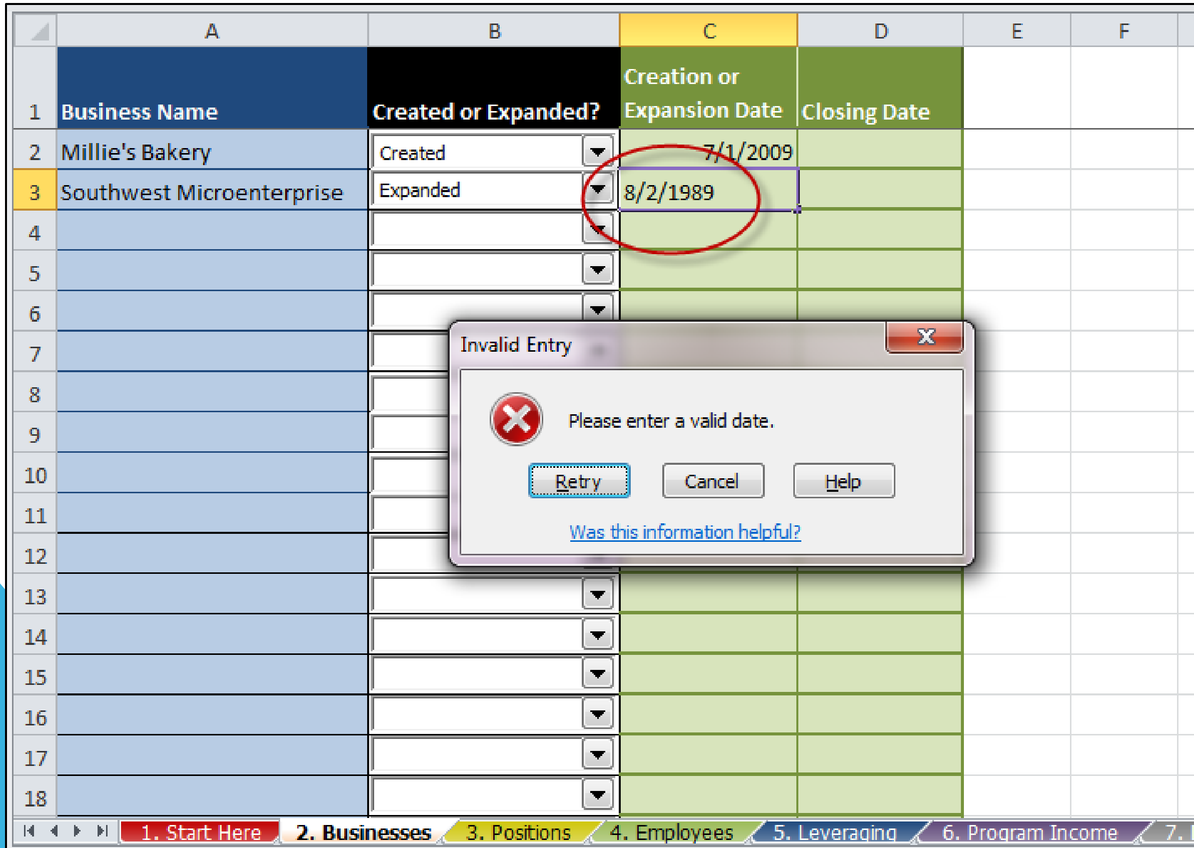
5. When you have successfully entered all businesses, progress to the next section by selecting tab 3 at the bottom of your screen labeled ‘3. Positions’.

Note: If you need to delete an entry from the drop down menu, click on the cell with your mouse to select it. Once selected, press the ‘Delete’ button on your keyboard. Do not click ‘Backspace’. If you need to delete entries from any other cells, be sure to click on the correct cell and click ‘Delete’ on your keyboard. **Do not add or delete full rows.**



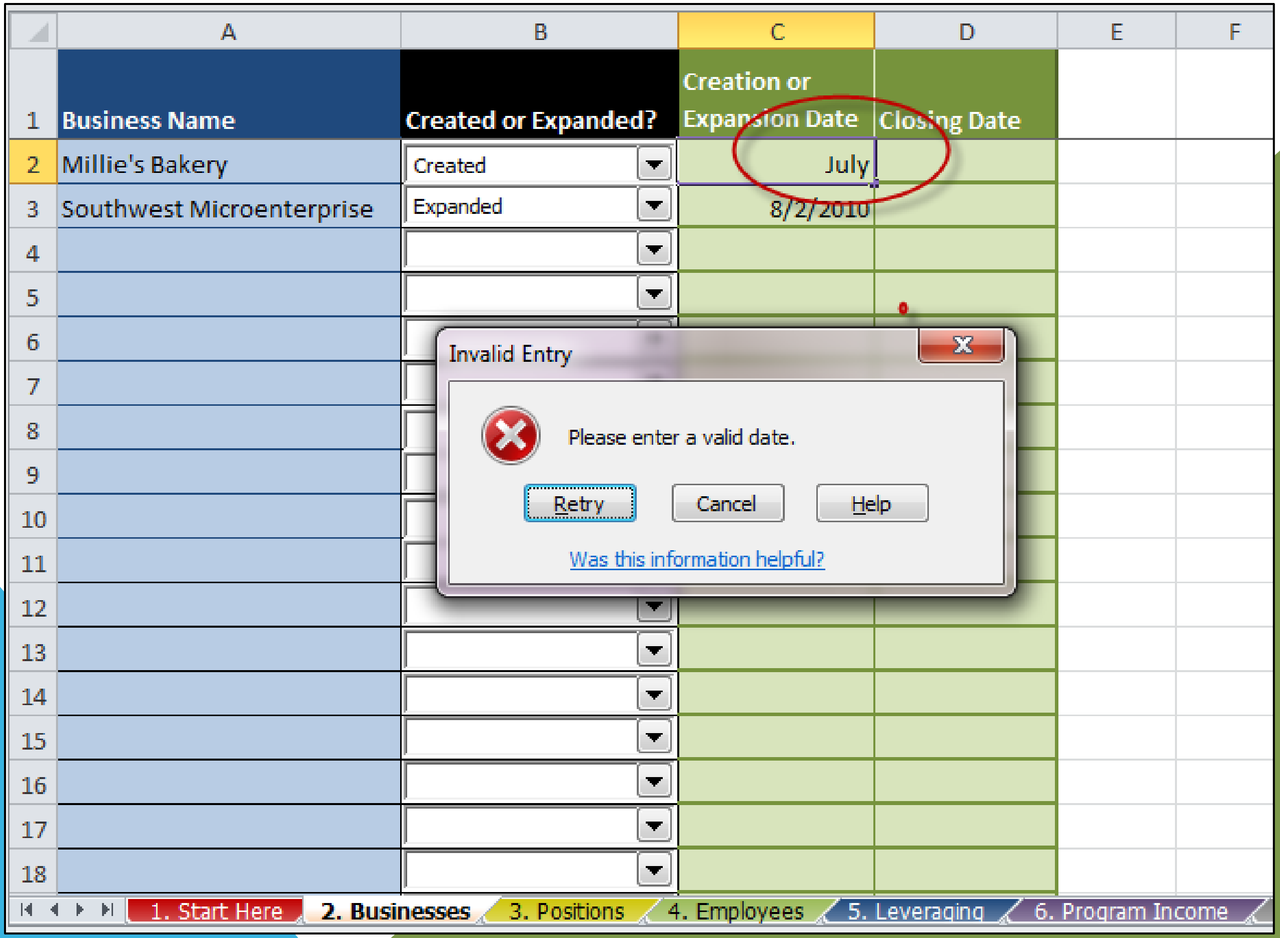
The closing date of a business must be on or after the creation or expansion date. If you enter a closing date that comes before the creation or start date, you will receive a stop error message and should double check the dates you have entered.

POTENTIAL ERROR MESSAGES IN THE BUSINESS TAB



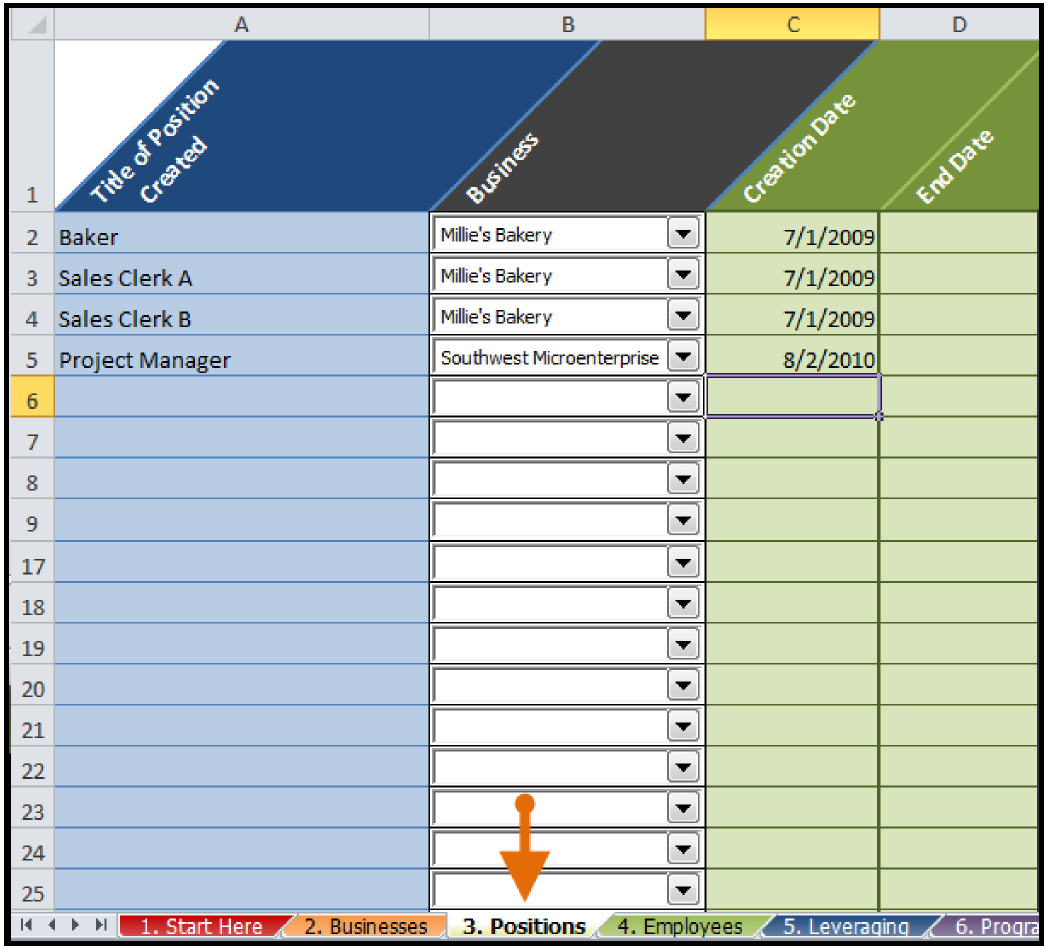
The creation date must be the same as or after the beginning of the CED/JOLI program. If you enter a creation or expansion date before the beginning of the CED/JOLI program, you will receive a stop error message and should double check the dates you have entered.

POTENTIAL ERROR MESSAGES IN THE BUSINESS TAB



If you don’t enter a specific date, you will receive a stop error message and should double check that you have entered dates.

POTENTIAL ERROR MESSAGES IN THE BUSINESS TAB



	A	B	C	D
1	Title of Position Created	Business	Creation Date	End Date
2	Baker	Millie's Bakery	7/1/2009	
3	Sales Clerk A	Millie's Bakery	7/1/2009	
4	Sales Clerk B	Millie's Bakery	7/1/2009	
5	Project Manager	Southwest Microenterprise	8/2/2010	
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The third tab of the tool is titled 'Positions'. This is where you will keep track of all the positions you create. This tab is not concerned with the number of new hires, but rather the positions themselves.

- Not every new hire is a new position. The same position might be held by a number of different individuals over time.
- All positions should be entered continuously down the rows. Do **not** add or skip rows as it will throw off the calculations in the final spreadsheet.

3. POSITIONS

1. Enter the title of position created in the first column. When entering the name of a position, **make sure to differentiate** between similar positions at the same business and similar positions across multiple businesses. This is critical in order to identify positions as you progress through the tool.

   - For positions with the same title in the same business, we recommend adding a letter to the end. For example: Sales Clerk (A) and Sales Clerk (B).
   - For positions with the same title in different businesses, we recommend adding the business name or first letter of the business name to the position title. For example: *J Sales Clerk (A)* for a sales clerk at Joe's Shoe Store, and *S Sales Clerk (A)* for a sales clerk at Stan's Grocery.

2. In Column B, select a business from the dropdown menu. This list of businesses will be automatically generated from the businesses entered in the Businesses tab. **All positions must be associated with a business.**

3. In Column C, enter the date the position was created. This is the first day anyone worked in that position.

4. In Column D, enter the date the position ended. If the position still exists, you may leave this field blank.

Please Note: The positions tab only documents how many *positions* were created; not how many individuals filled that position over time. For example: If one individual was Sales Clerk A for 3 months, and then another individual took their place for the next 6 months, the position of 'Sales Clerk A' existed for those 9 months. The second individual took the first individual's place, but they both filled the same position. Thus, 'Sales Clerk A' would only be noted as one position.

If more than one employee filled a position during it's tenure, this will be noted in the tab titled 'Employees' (next); **not** under the 'Positions' tab.

5. For columns E-H, check the appropriate boxes. If the position includes Health Care, click on the check box in Column E; If Sick Leave is provided, click on the box in Column F; If there is a Retirement plan, click on the box in Column G; If Profit Sharing is included with the position check the box in Column H. In order to check the box, simply click on the box in the appropriate column. Once you click, a check should appear in the box to indicate that it has been selected. In order to uncheck a box, simply click the box again and the check will disappear.

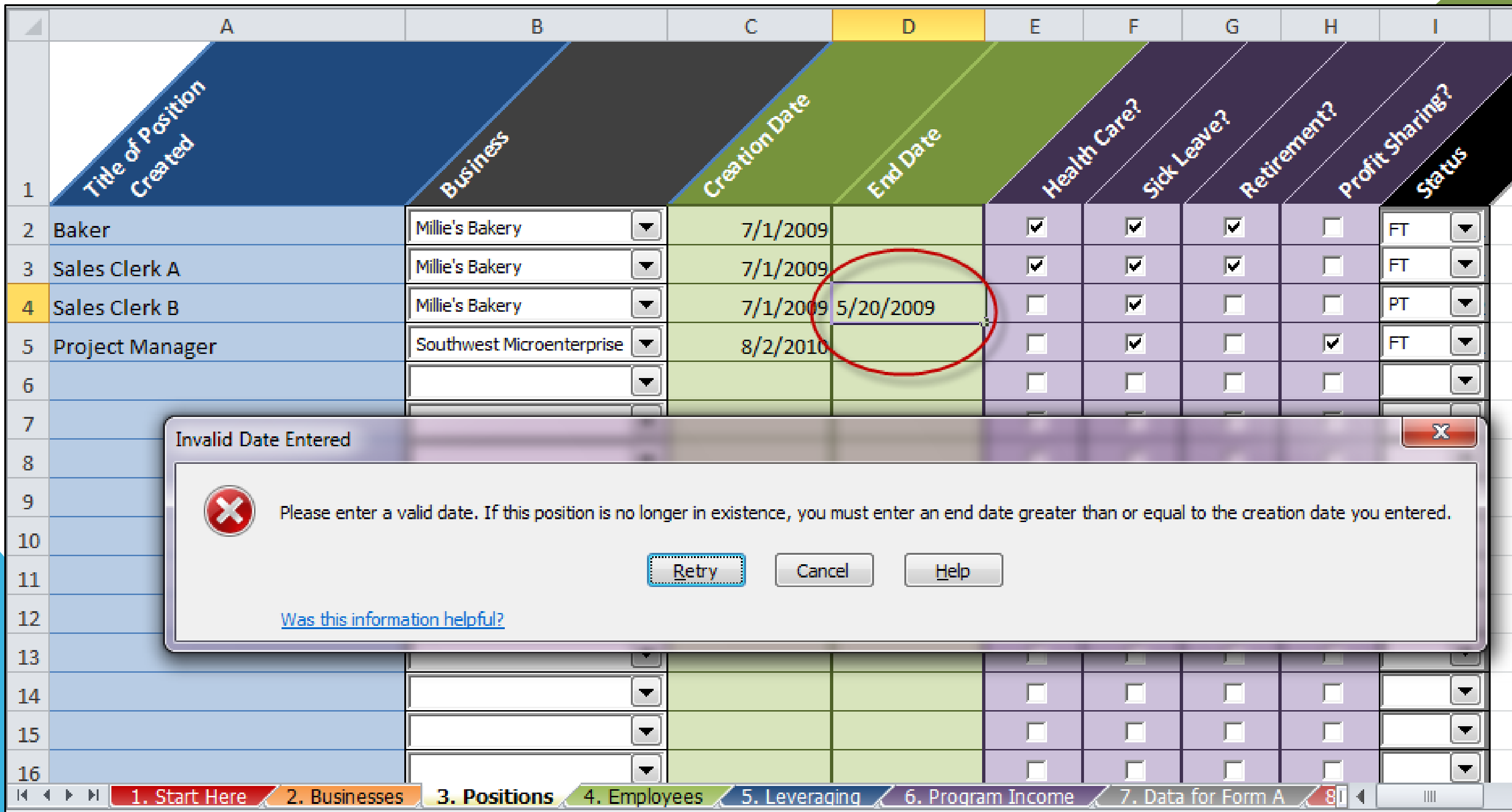
6. In the last column, indicate whether the position is Full Time (FT) or Part Time (PT) by selecting the correct option from the dropdown menu.

7. Make sure you enter position information in the correct row.

8. When you have successfully entered <u>all</u> positions, progress to the next section by selecting tab 4 at the bottom of your screen labeled '4. Employees'.

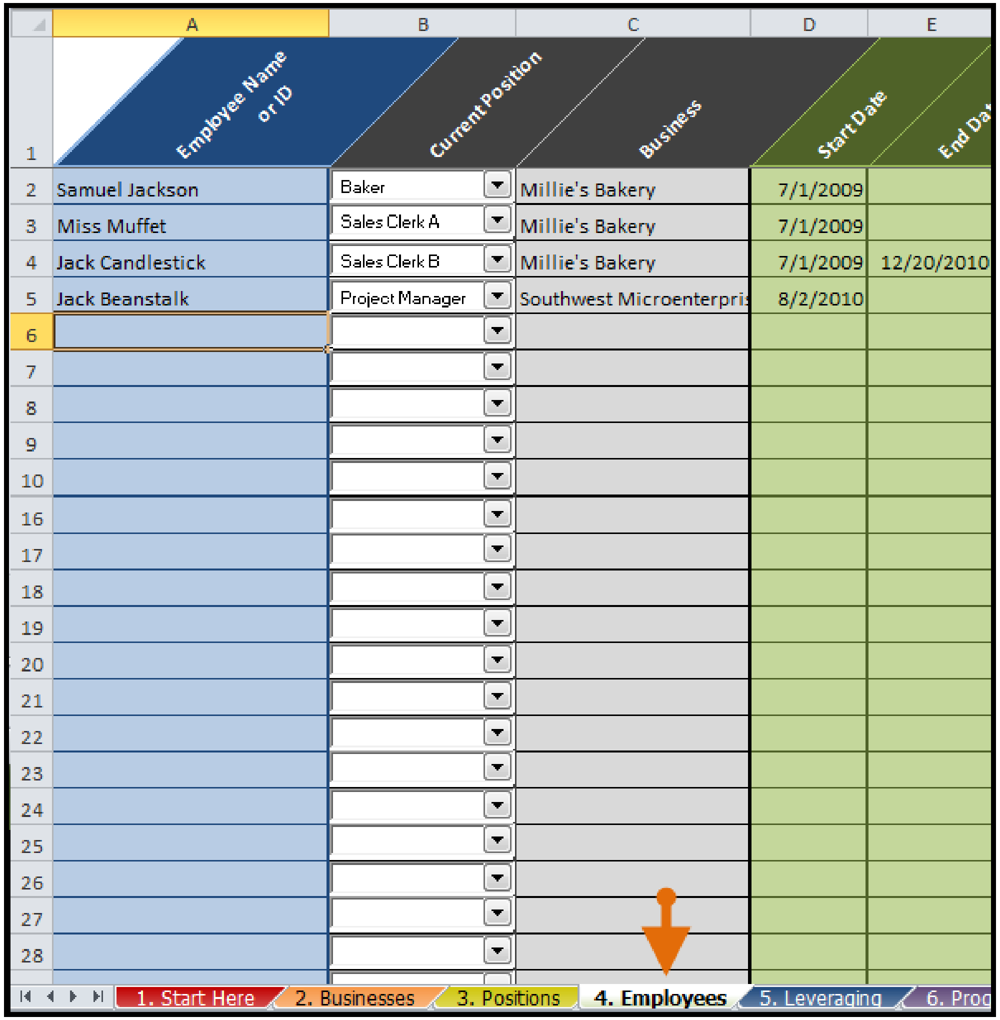
<u>**What do I do if a position changes from Full Time (FT) to Part Time (PT)?**</u>

If a position changes from being Part Time to Full Time, or vice versa, do not create a new position. Make the change by selecting the appropriate option in the drop down in Column I (PT or FT). In the next tab, be sure to change the wage so it reflects the new type of position. <u>This is the only time you should change the wage</u>.



The closing date of a position must be on or after the creation or expansion date. If you enter a closing date that comes before the creation or start date, you will receive a stop error message and should double check the dates you have entered.

POTENTIAL ERROR MESSAGES IN THE POSITIONS TAB



	A	B	C	D	E
1	Employee Name or ID	Current Position	Business	Start Date	End Da
2	Samuel Jackson	Baker	Millie's Bakery	7/1/2009	
3	Miss Muffet	Sales Clerk A	Millie's Bakery	7/1/2009	
4	Jack Candlestick	Sales Clerk B	Millie's Bakery	7/1/2009	12/20/2010
5	Jack Beanstalk	Project Manager	Southwest Microenterpri	8/2/2010	
6					
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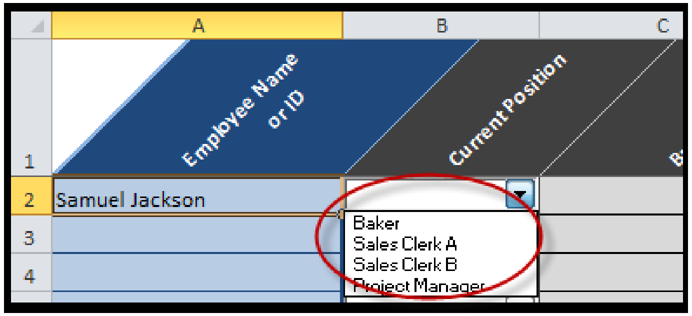
The next tab is titled ‘Employees’. This is where you will keep track of the employees hired into the positions you have helped create.

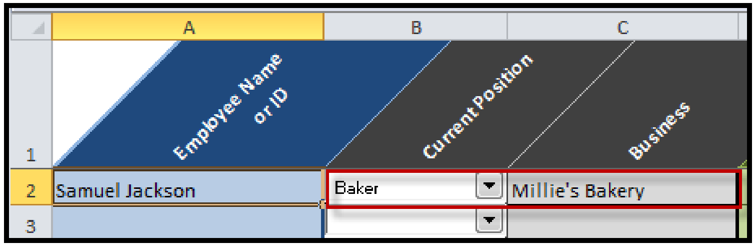
- All employees should be entered continuously down the rows. Do **not** skip rows.
- You can use the employee name or ID number.

4. EMPLOYEES

1. In Column A, enter the name of the Employee or the Employee ID.
2. In Column B, select the correct position from the dropdown. These options will be automatically generated from the positions you entered in the previous tab.



3. Once you have selected the correct position, the Column C will be automatically populated with the corresponding business. This information is taken from the information you entered in previous tabs. You will not be permitted to delete entries from the Business column. If the incorrect business appears after selecting a position, please navigate back to the 'Positions' tab on your Data Collection Tool and make sure that the position is assigned to the correct business.



In order to delete a business, you will have to delete the position. To do this, select the cell displaying the name of the business. Navigate to the cell with the dropdown menu using the arrow keys on your mouse. Once that cell is selected, hit the 'Delete' button on your keyboard. When you navigate away from the cell, both the position and the business name should be cleared.

5. In Column E, enter the date that the employee started working in the listed position.

6. In Column F, enter the date the employee ended work in the listed position. If the employee still holds that position, you may leave this field blank.

7. Columns F-H ask you to identify whether or not the employee was trained through CED/JOLI funds, is a TANF recipient and/or is low-income. Please check the boxes applicable to the employee.

8. Select the checkbox in the low-income column only if the employee qualified as low-income at the time of their initial employment.

Who qualifies as low-income?

- Under CED, low-income is 125 percent of the HHS poverty line.
- Under JOLI, low-income is 100 percent of the HHS poverty line.
- HHS poverty guidelines are available here: http://aspe.hhs.gov/poverty/
- If the employee was a TANF recipient, they should automatically be counted as low-income.

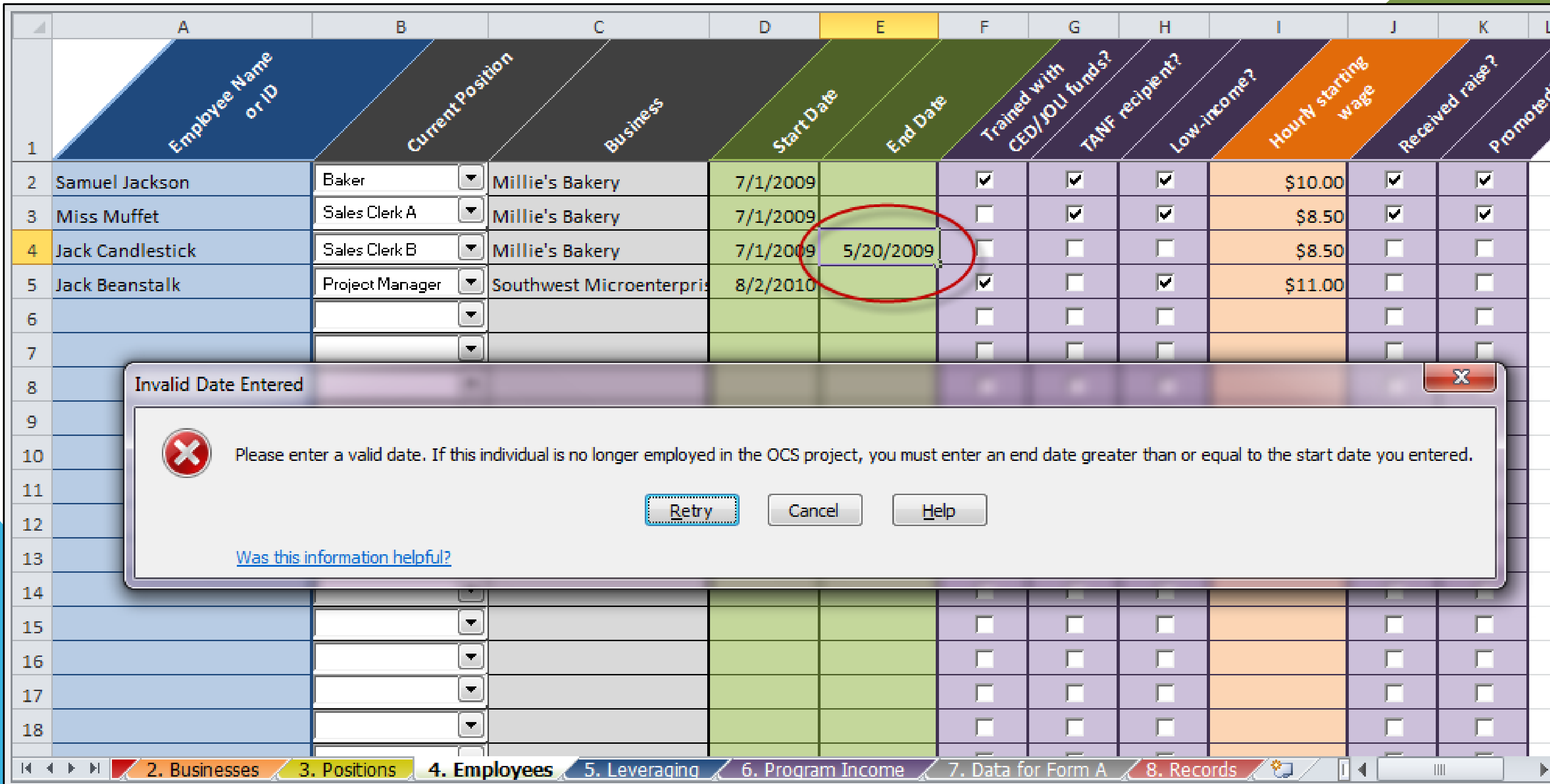
9. In the next column, enter the hourly starting wage. This is the wage of the employee on the day they began. The <u>only time</u> this should change is if a position changes from Part Time to Full Time, or vice versa. If this happens, remember to change the wage here.

10. If the employee received a raise, check the box in the next column by clicking on it. Raises only needed to be documented **once** by clicking this checkbox — do not note this change in any other field.*

11. In the next column, check the box if the employee received a promotion. Promotions only needed to be documented **once** by clicking this checkbox — do not note this change in any other field.

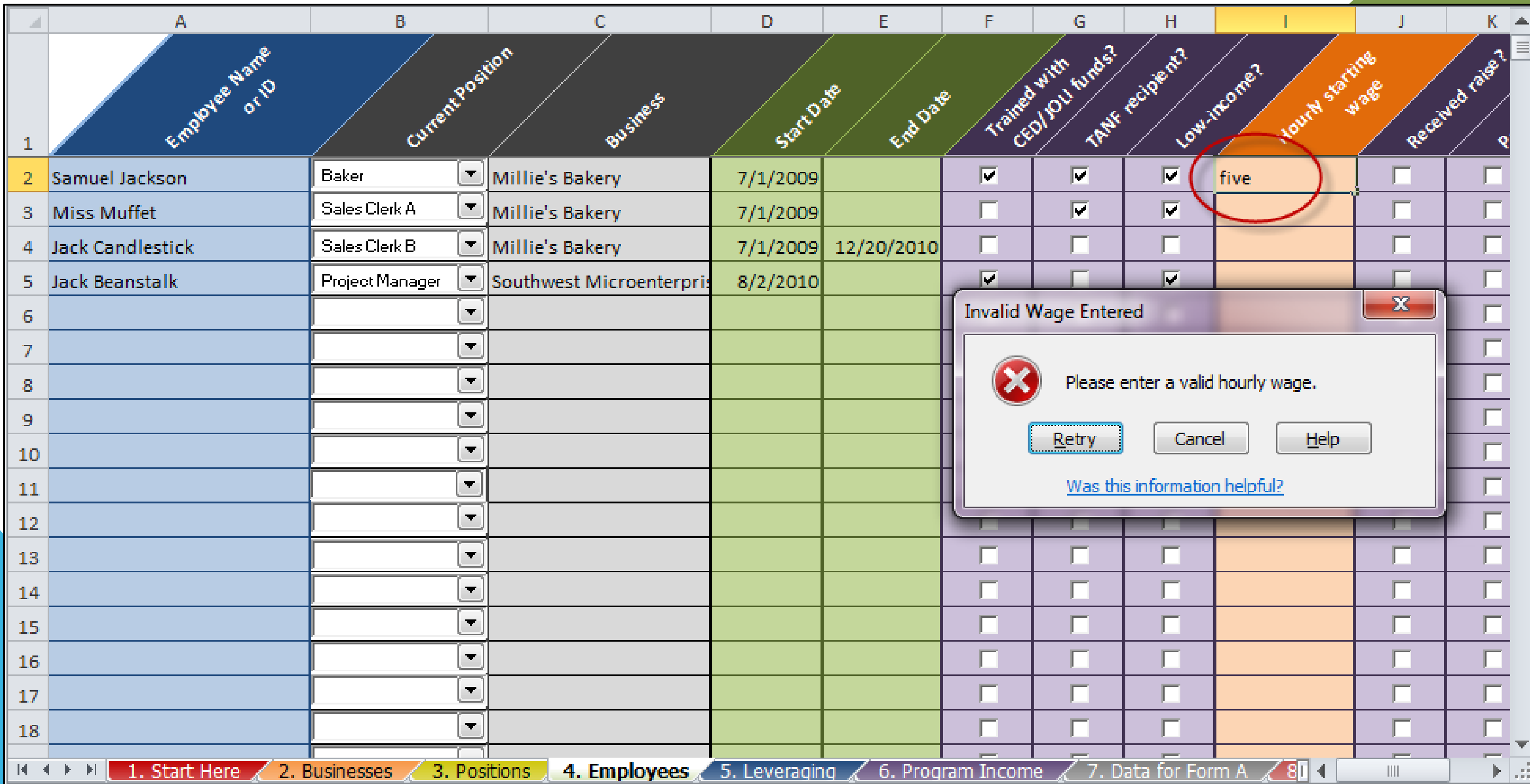
12. If an employee is replaced, <u>do not delete his/her entry in the tool</u>. Instead, enter his/her end date of employment in Column E. Then add the replacement employee as a new employee. Select the correct position in Column B.

*If an employee receives multiple raises and/or promotions, the best place to capture this information is in the notes column of the actual Progress Performance Report (PPR) found online, not in this data collection tool.



The end date of an employee's position must be on or after the start date. If you enter a end date that comes before the start date, you will receive a stop error message and should double check the dates you have entered.

POTENTIAL ERROR MESSAGES IN THE EMPLOYEES TAB



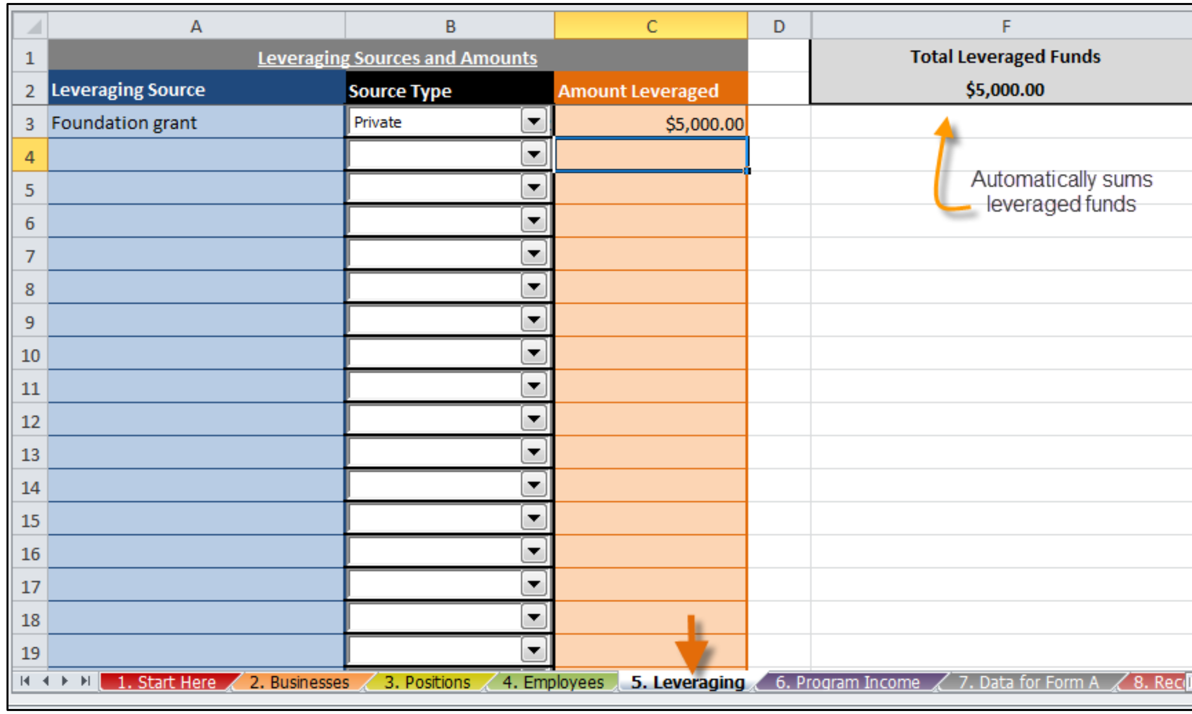
If you don't enter a specific wage, you will receive a stop error message and should double check the data has been properly entered.

POTENTIAL ERROR MESSAGES IN THE EMPLOYEES TAB

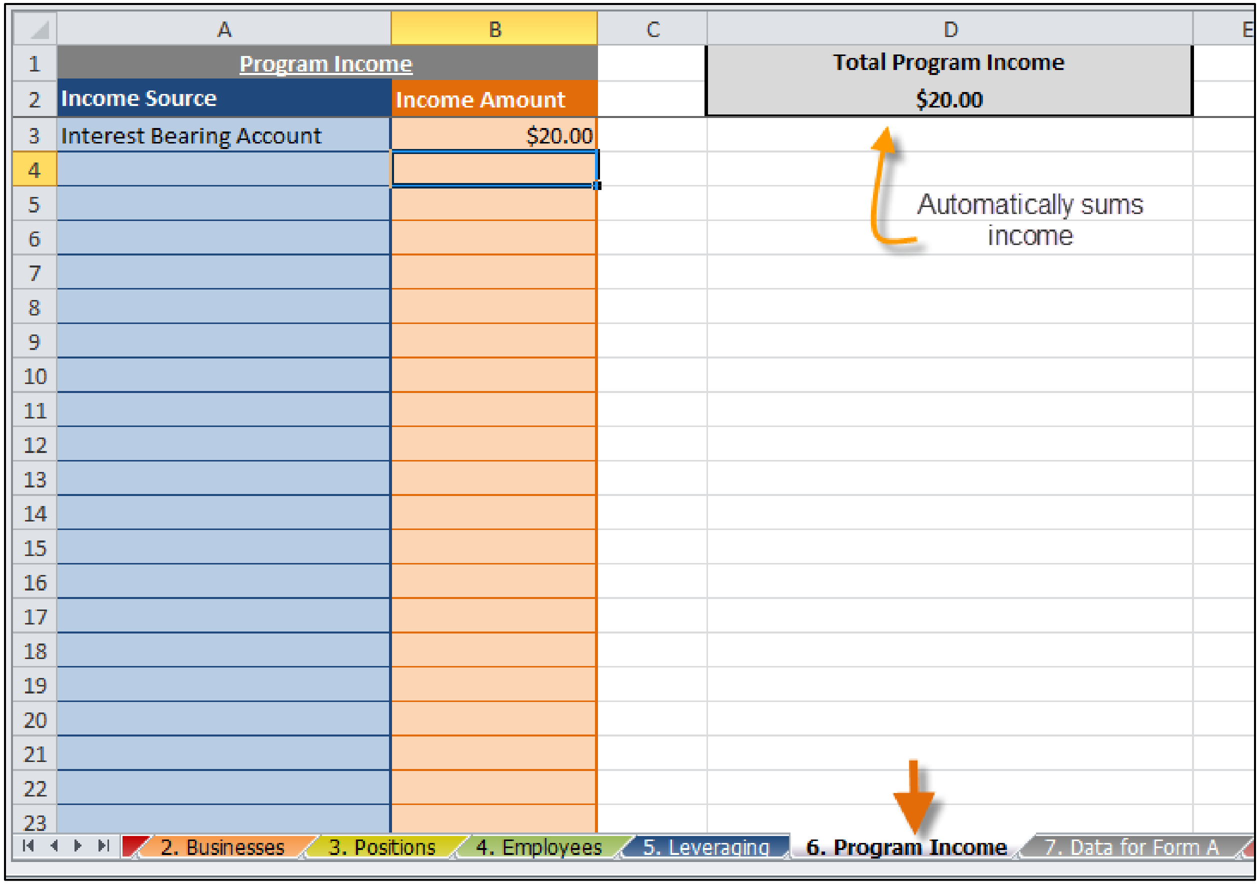
5. LEVERAGING

In the next tab of the Data Collection Tool, you will keep track of all additional funding you have secured to increase the success of your project.

- Each leveraging category is mutually exclusive. If you received a loan, select *Loan* as Source Type – regardless of whether the loan was a government loan or a private loan. Similarly, if you received a grant, specify whether the grant was *Government*, *Private*, or *Other* in Source Type.
- If your leveraged funds do not belong in the established categories, select *Other* and specify the type in the Notes Field of the actual PPR found online.



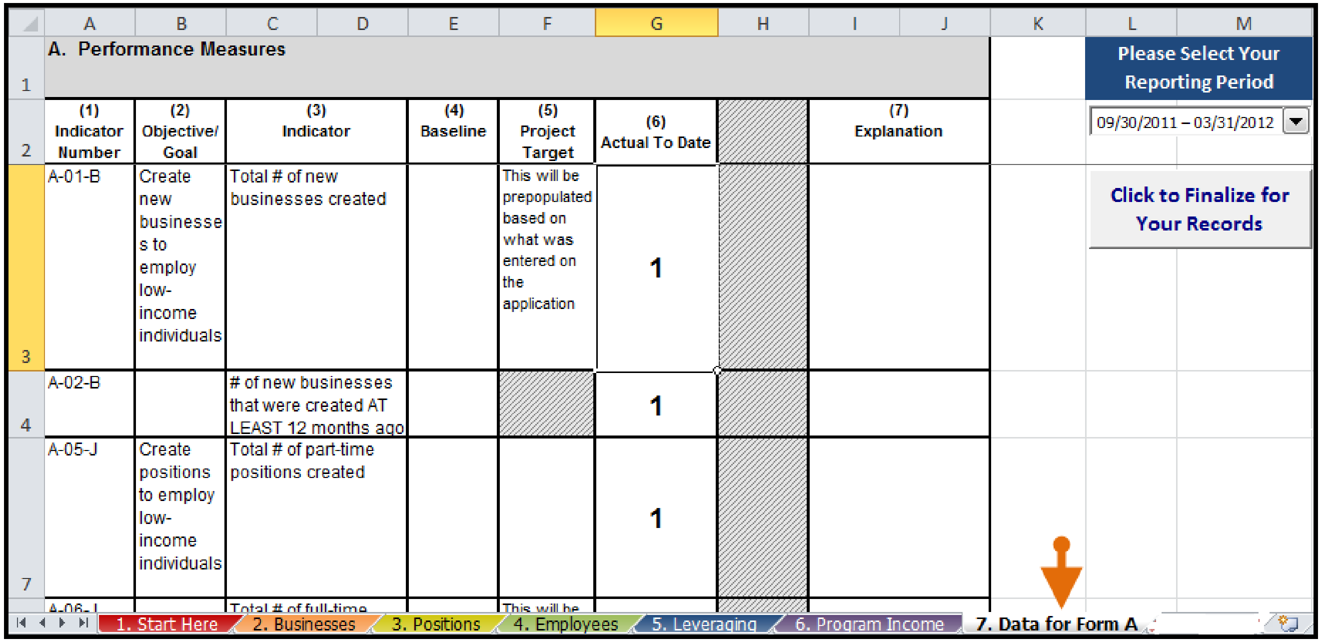
The *Total Leveraged Funds* field in the top right will automatically update as you enter additional sources.



In the 'Program Income' tab, you will track any program income your project has generated.

- Not all programs will generate income — if yours doesn't, you can leave this tab blank.
- The *Total Program Income* field will continue to update as you enter additional sources.

6. PROGRAM INCOME



A. Performance Measures

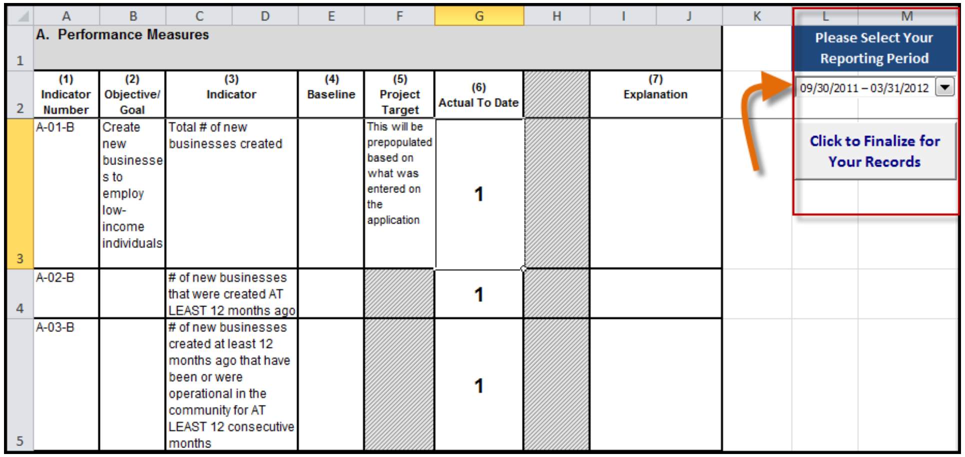
(1) Indicator Number	(2) Objective/ Goal	(3) Indicator	(4) Baseline	(5) Project Target	(6) Actual To Date		(7) Explanation
A-01-B	Create new businesses to employ low-income individuals	Total # of new businesses created		This will be prepopulated based on what was entered on the application	1		
A-02-B		# of new businesses that were created AT LEAST 12 months ago			1		
A-05-J	Create positions to employ low-income individuals	Total # of part-time positions created			1		
A-06-J		Total # of full-time		This will be			

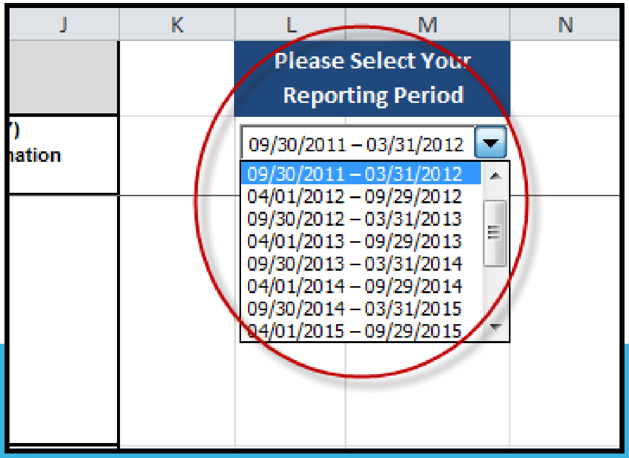
This seventh tab, titled 'Data for Form A', will compile all information entered in previous tabs so that it is ready for you to enter into OLDC.

- **You cannot edit this tab.**

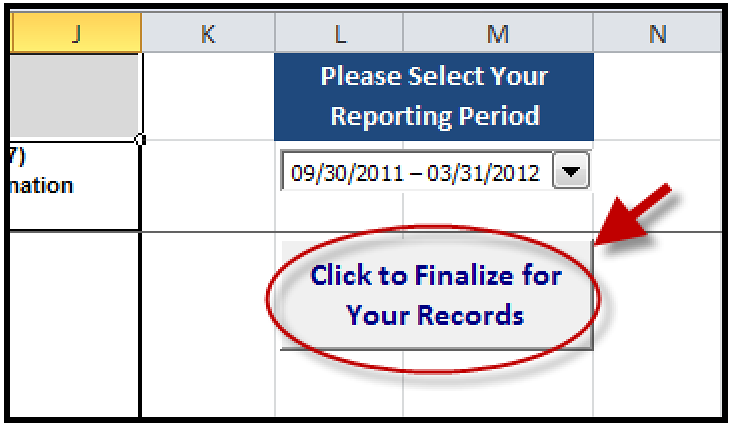
7. DATA FOR FORM A

1. Select the correct recording period from the dropdown menu in the upper right hand corner of your screen. **Be careful**, if you accidentally select reporting period you have already completed and click the Finalize button, *it will overwrite your old records.*

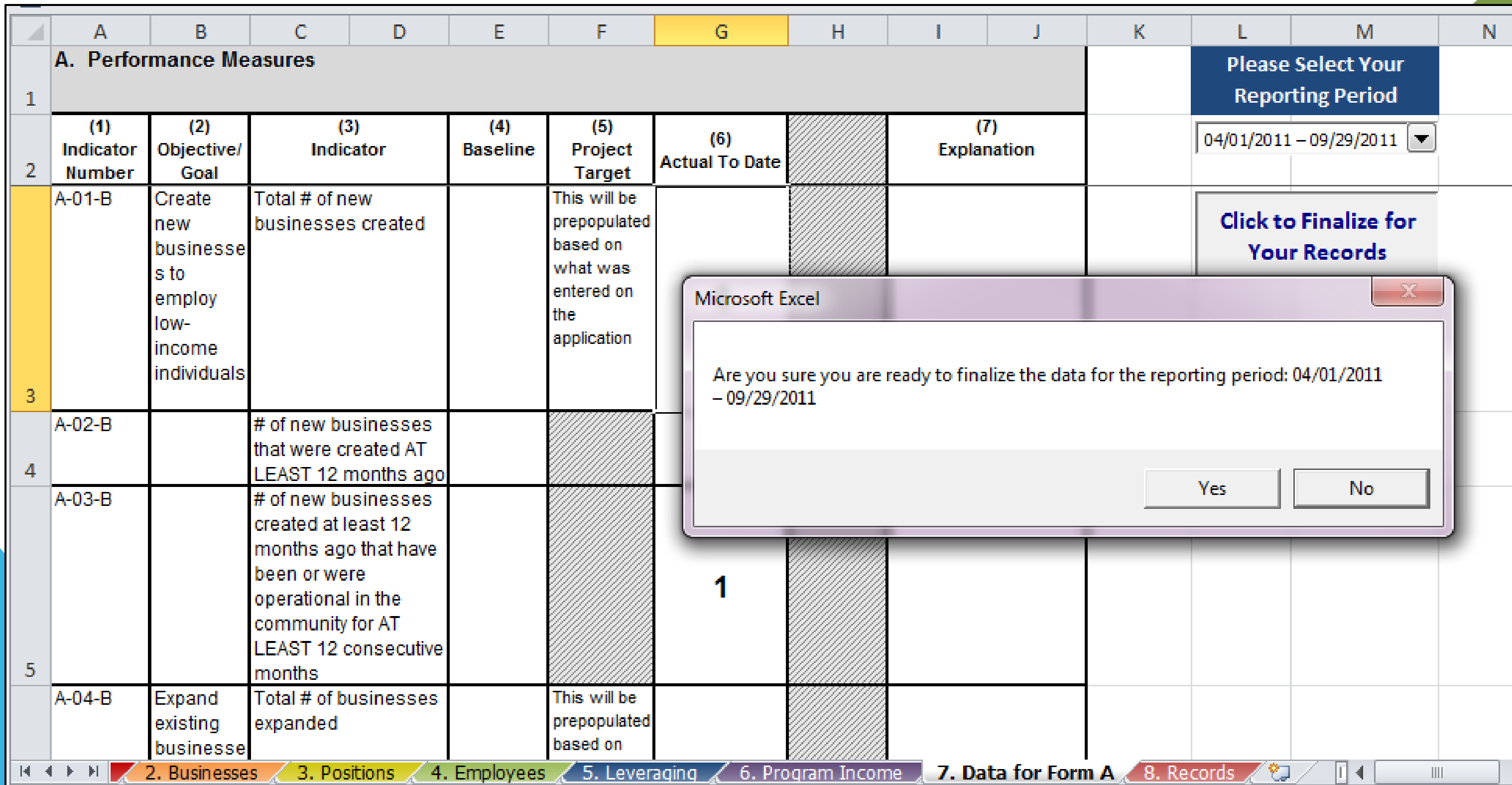




2. Once you have selected the correct reporting period and verified all data is entered correctly, click the button titled ‘Click to Finalize for Your Records’ button beneath the dropdown menu.



<u>Important</u>: Clicking the Finalize button **will not** submit your form to OCS. You must copy the numbers you see here into the online Form A in order to successfully submit your information.

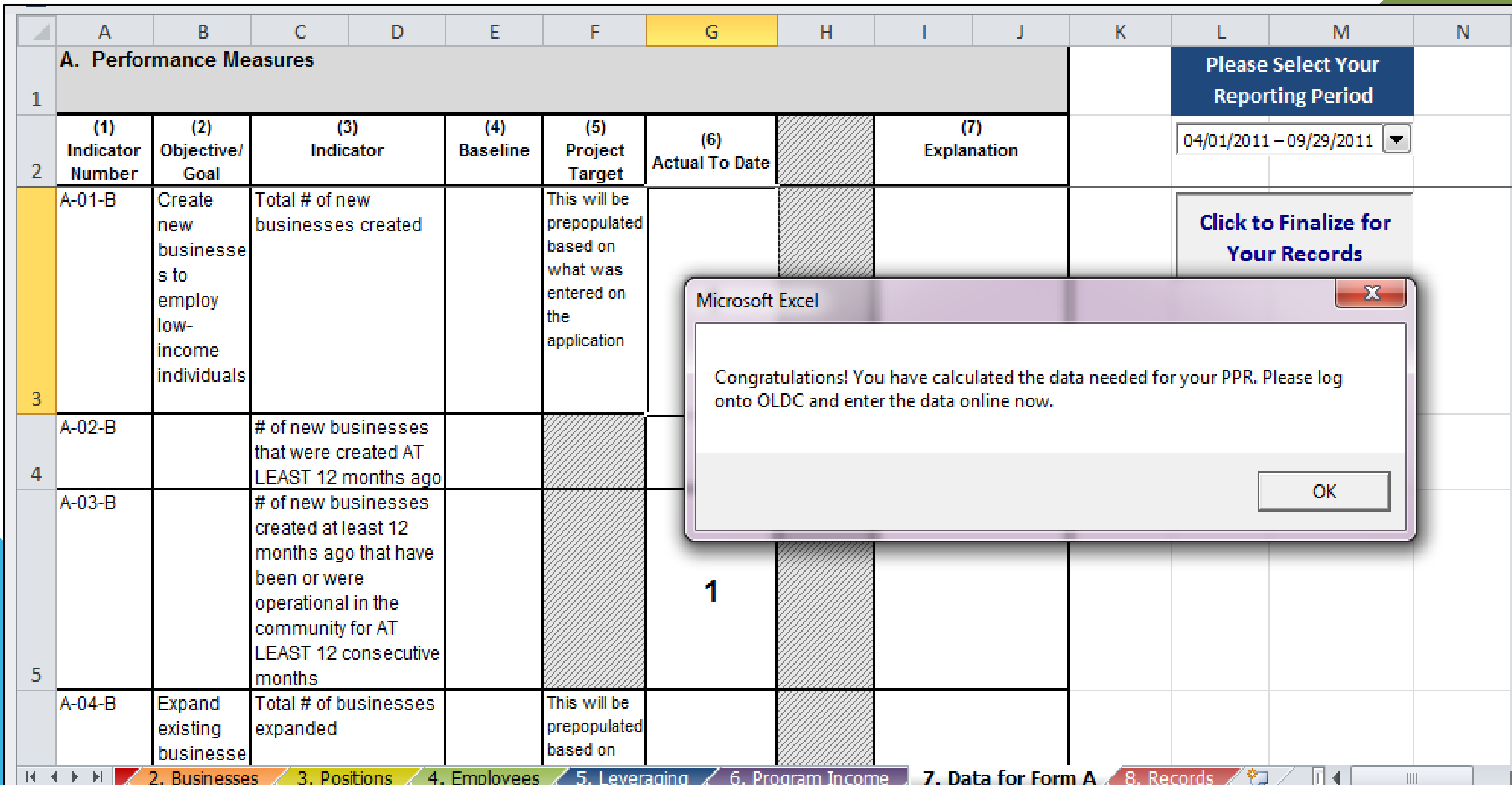


When you click to finalize your records, Excel will ask if you are sure that you are ready to finalize your records.

If you select “Yes,” the information you input will be added to the Records tab.

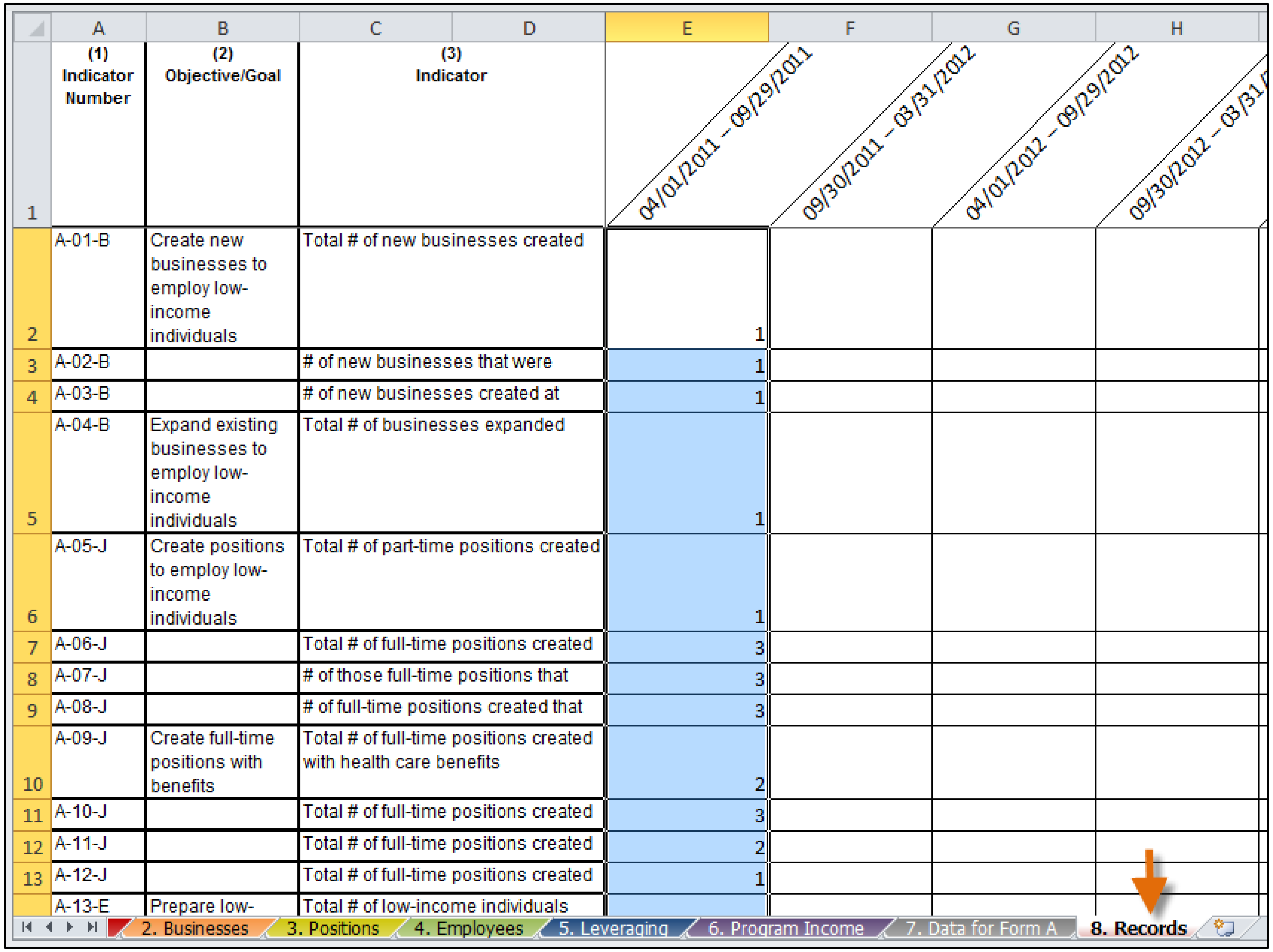
If you select “No,” you will be allowed to continue editing.

WARNING MESSAGES IN DATA FOR FORM A



When you click to finalize your records and select "Yes" on the warning message you will see this second message reminding you to enter your data online in OLDC.

WARNING MESSAGES IN DATA FOR FORM A



	A	B	C	D	E	F	G	H
1	(1) Indicator Number	(2) Objective/Goal	(3) Indicator		04/01/2011 – 09/29/2011	09/30/2011 – 03/31/2012	04/01/2012 – 09/29/2012	09/30/2012 – 03/31/
2	A-01-B	Create new businesses to employ low-income individuals	Total # of new businesses created		1			
3	A-02-B		# of new businesses that were		1			
4	A-03-B		# of new businesses created at		1			
5	A-04-B	Expand existing businesses to employ low-income individuals	Total # of businesses expanded		1			
6	A-05-J	Create positions to employ low-income individuals	Total # of part-time positions created		1			
7	A-06-J		Total # of full-time positions created		3			
8	A-07-J		# of those full-time positions that		3			
9	A-08-J		# of full-time positions created that		3			
10	A-09-J	Create full-time positions with benefits	Total # of full-time positions created with health care benefits		2			
11	A-10-J		Total # of full-time positions created		3			
12	A-11-J		Total # of full-time positions created		2			
13	A-12-J		Total # of full-time positions created		1			
	A-13-E	Prepare low-	Total # of low-income individuals					

The final tab, titled ‘Records’ is automatically updated when you click the finalize button on the previous tab.

- You will be able to find the data for all the PPRs you have submitted since you started using the tool.
- Do **not** edit any information on this page.
- For future reports, continue adding to this spreadsheet. **Do not** create new versions or delete previously entered information.

8. RECORDS