

# PennSERVE OnCorps Reports User Guide 2016-2017



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## Accessing OnCorps Reports and Logging In

OnCorps Reports' web address is <http://pa.uncorpsreports.com/> After accessing this address, you will reach the homepage.

Choose the current program year from the drop down menu and then click the Submit button to the right of the program year.



**OnCorps Reports™**  
On task. On time. Online.

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**All Services Operating Normally**

**Reminder:** Uploaded or imported files (documents and images) will be accessible to other users within a 15 min. window. This applies to Financial History files, upload/download files, Resources, etc.

**How to Log In to OnCorps Reports™!**

**Step 1-** Select Program Year (**Current Program Year is 2011-2012**)

**Step 2-** Login as Commission Staff, Program Director, Site Supervisor, Regional Coordinator or Americorps Member

**Log In to your account**

Please select your program year:  
2011-2012 Submit

If your user name or password fails, enter a valid email address in the box under "Forgot your password" and the system will send you instructions for resetting your password.

The email address you enter must be the same email address currently on file in your OnCorps member record--if that has changed, your Program Director will need to update your email address for this feature to work correctly.

The next screen features all of the participating AmeriCorps programs in PA, and it also includes links for Program Directors, Site Supervisors, AmeriCorps Members, and State Commission Staff to Log In. Click the appropriate link under your program to proceed to the login page.



Participating Programs : 2011-2012

Pennsylvania

**Centre County Youth Service Bureau**  
[Web Site](#)  
[Program Director](#)  
[Site Supervisor](#)  
[AmeriCorps Member](#)

**City Year Greater Philadelphia**  
[Web Site](#)  
[Program Director](#)  
[Site Supervisor](#)  
[AmeriCorps Member](#)

[State Commission Staff Login](#)

Demo Programs : 2011-2012

**Test Program**  
[Program Director](#)  
[Site Supervisor](#)  
[AmeriCorps Member](#)

On the Login Screen, enter your Username and Password and then click the Login button below.

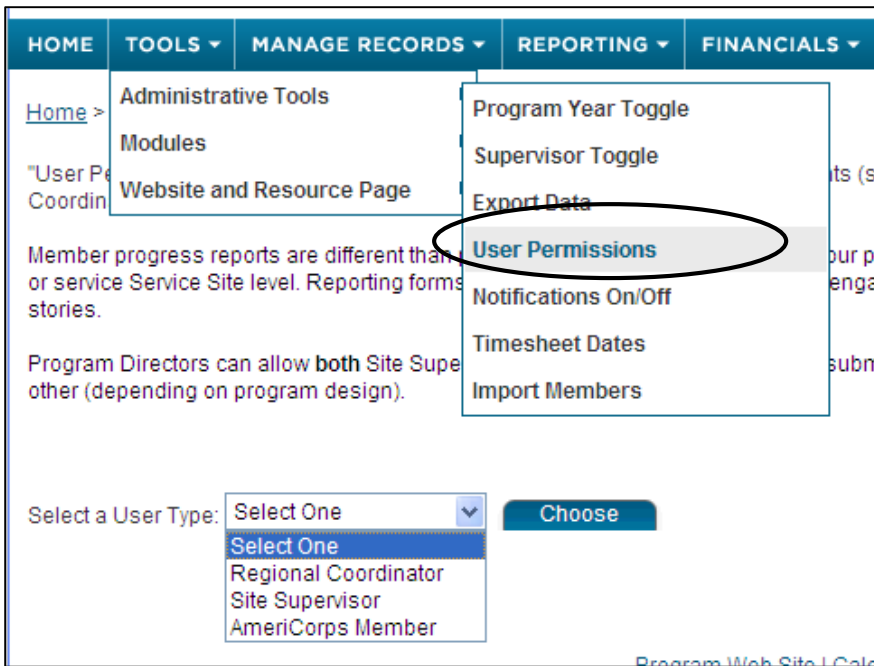


## Adding Users and Editing User Permissions

Any individual with program director user access to OnCorps may create other users in OnCorps, including program directors, regional coordinators, site supervisors, and members. To add new users, select the “Manage Records” tab; from there, you will click on the user type you would like to add. In the below screen, a program director is being added.



In addition to adding users, program directors can also determine what functions of OnCorps regional coordinators, site supervisors, and members will have access to. By visiting the “Tools” Tab, then selecting Administrative Tools > User Permissions, program directors may change the access abilities for different user levels.



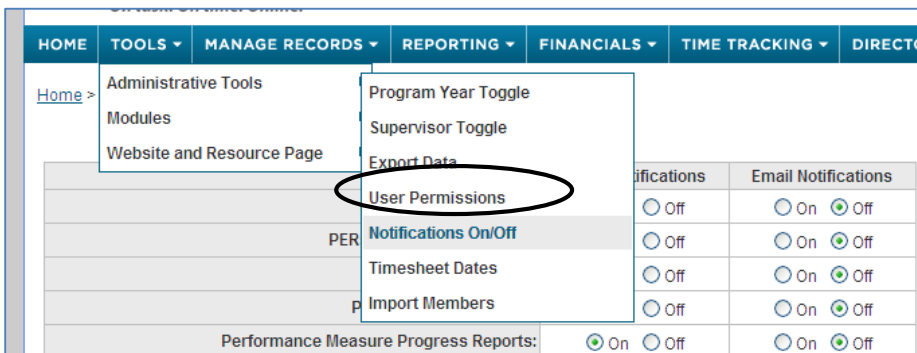
Three access options exist for program director users: access to all functions, access to all functions except fiscal functions, and access to only fiscal functions. When adding a program director user level, the individual creating access should consider what reports the new user will need to carry out and should assign permissions accordingly.

**Recommendation:** Review all User Permissions in OnCorps to make sure that your supervisors and members have access to everything they need.

### Turning on Notifications in OnCorps

OnCorps sends users notifications via the OnCorps Reports home screen; however, should you wish to receive notifications via email, you must turn this function on. We strongly recommend that program director users have email notifications regarding budgets, PERs, and other fiscal functions turned ON.

To turn on notifications, move your cursor over Tools, then Administrative Tools > Notifications On/Off. Please note each user must turn notifications on or off individually; there is no way for program director users to change this setting for other users.



## Member Enrollment

### Importing Member Information

All members must be entered into OnCorps so that they may begin entering timesheets. OnCorps allows programs to import members directly from the My AmeriCorps Portal; as such, PennSERVE strongly recommends entering all members into My AmeriCorps before entering into OnCorps.

To Import Members, go to Manage Records > Members > Import Members.

Follow the instructions on this screen to enter all of the program's AmeriCorps members at once using data exported from My AmeriCorps Portal.

Alternatively, you can enter AmeriCorps members individually by following the below instructions.

### Member Profile Page

The member profile page is split into several sections. The first section is Demographics Information. Required sections are marked by a red star.

* Required field	
Member Profile - Standard	
Demographic Information	
* First Name: <input type="text"/>	* Last Name: <input type="text"/>
* Email: <input type="text"/>	NSP ID: <input type="text"/>
* Address: <input type="text"/>	Address 2: <input type="text"/>
* City: <input type="text"/>	County: Select One <input type="button" value="v"/>
* State: Select One <input type="button" value="v"/>	* Zip: <input type="text"/> - <input type="text"/>
* Phone: <input type="text"/> <input type="text"/> <input type="text"/> Ext. <input type="text"/>	Fax: <input type="text"/> <input type="text"/> <input type="text"/>
Cell: <input type="text"/> <input type="text"/> <input type="text"/>	Gender: <input type="radio"/> Male <input type="radio"/> Female
* Birth Date: <input type="text"/> (eg: 04/25/1982)	Race: Select One <input type="button" value="v"/>

The next sections include Account Information, Service Categories, and Supervisors. Fill in all of the required fields in these sections, including the “Login” and “Password” fields that will allow members to log-in to OnCorps. Please note that the Status field is also required.

**Note:** Your program must have the service sites and site supervisors entered into OnCorps before beginning the member profile setups. OnCorps requires a site and a supervisor be assigned to each member before it will allow the member profile to be saved.

Account Information	
Status: <input type="text" value="Select One"/>	Exit Date: <input type="text" value="9"/> (mm/dd/yyyy)
Hide AmeriCorps Member?: <input type="radio"/> Yes <input checked="" type="radio"/> No	Category: N/A
* Login: <input type="text"/>	Supported By Cost Share: N/A
* Password: <input type="text"/>	* Verify Password: <input type="text"/>
Slot Type: <input type="text" value="Select One"/>	Will AmeriCorps Member Be Serving Next Year?: <input type="radio"/> Yes <input checked="" type="radio"/> No
* Service Start Date: <input type="text" value="9"/> (mm/dd/yyyy)	* Expected Service End Date: <input type="text" value="9"/> (mm/dd/yyyy)
Service Mid-Year Date: <input type="text" value="9"/> (mm/dd/yyyy)	Pre-OnCorps Service Hours: <input type="text" value="0"/>
Pre-OnCorps Fundraising Hours: <input type="text" value="0"/>	Pre-OnCorps Training Hours: <input type="text" value="0"/>
Date Suspended #1: <input type="text" value="9"/> (mm/dd/yyyy)	Date Reinstated #1: <input type="text" value="9"/> (mm/dd/yyyy)
Date Suspended #2: <input type="text" value="9"/> (mm/dd/yyyy)	Date Reinstated #2: <input type="text" value="9"/> (mm/dd/yyyy)
Date Suspended #3: <input type="text" value="9"/> (mm/dd/yyyy)	Date Reinstated #3: <input type="text" value="9"/> (mm/dd/yyyy)
Service Categories	
Primary Service Category: <input type="text" value="None"/>	<input type="text" value="None"/>
Secondary Service Category: <input type="text" value="None"/>	<input type="text" value="None"/>
Supervisors	
* Supervisor #1: <input type="text" value="Select One"/>	

### Attaching the Member Position Description

Each member’s position description must be uploaded into OnCorps. In Manage Records, select the member whose position description you would like to attach. Click on “Files.”

HOME	TOOLS	MANAGE RECORDS	REPORTING	FINANCIALS	TIME TRACKING	DIRECTORIES	CALENDAR	HELP	
Home > Manage Records > Members > Members		Page Tools		Help		Create PDF			
Member Records			Prospective Members			Import Members			
Program MSY's Total Allocated: 0 Total Used: 1 (0%)									
Add a New AmeriCorps Member									
<b>Assigned Members</b>									
Member Last	Member First	Category	Supervisor	Site	Status				
1	Wazowski	Mike	AmeriCorps Member	Dean Hardscrabble	Monstropolis Public Works	Enrolled	Edit	Reports	<b>Files</b>

To Upload the member file, click on Browse to locate it on your computer. After locating and clicking on the file you wish upload, fill in the “Description” field. This is the text that will appear next to the document after uploading. Click “Upload” to complete.

HOME	TOOLS ▾	MANAGE RECORDS ▾	REPORTING ▾	FINANCIALS ▾	TIME TRACKING ▾	DI
Home > <a href="#">Manage Records</a> > Members > <a href="#">Members</a> > Member Files						
File:		C:\Users\kemartini\Desktop\Wazowski. Pos Descrip.c <input type="button" value="Browse..."/>				
<b>PLEASE NOTE:</b> Filenames should only contain alpha-numeric characters (0-9, a-z). Do not upload any file containing special characters in the name such as +, &, ^, %, etc.						
Description:		<input type="text" value="Mike Wazowski Position Description"/>				
<input type="button" value="Upload"/>						

### Attaching the Member Contract Template

Programs are required to upload a copy of their member contract template to OnCorps.

To upload additional documents, select “Reporting” and Upload/Download Files.

REPORTING ▾	FINANCIALS ▾	TIME TR
Submit Program Reports ▶		
Approve Program Reports		
View Program Reports ▶		
Submit Service Reports ▶		
Approve Service Reports		
View Service Reports ▶		
<b>Upload/Download Files</b>		
Scheduled Reports		

Once in the Upload/Download screen, attach the member contract using “Browse” button. Your program name will automatically appear; the person entering the information should enter their name into the “Uploaded By” function.

Upload/Download Files	
Upload a new File/Document:	
File:	P:\2014-2015 PennSERVE Operations\PennSERV\ <input type="button" value="Browse..."/>
Program:	Test Program
Uploaded By:	<input type="text" value="Test User 1"/>
Description:	<input type="text" value="Test Program Member Contract Template 2014"/>
<input type="button" value="Upload"/>	

After attaching the document and entering the description, click on “Upload.” The following screen will appear confirming that you have successfully uploaded a document:

Upload/Download Files									
Uploaded Files/Documents:									
Filename	Last Uploaded By	Upload Date	Uploaded By	Description					
Member Contract Template.docx	Program Director	07/11/2014	Test User 1	Test Program Member Contract Template 2014	<a href="#">Update</a>	<a href="#">Download</a>	<a href="#">Delete</a>	<a href="#">✕</a>	

## Timesheets

### Selecting the Timesheet Format

To set-up your timesheet, go to “Tools,” then “Administrative Tools,” and finally “Timesheet Set Up.”




Next, scroll down to the bottom of the page and select Version X. After clicking “Save,” you will be taken to the timesheet set-up page.



**Version X: Flexible Categories Time In/Time Out, Time Off Tracking**

- Members use drop-down menus to enter start & end times for activities
- Format includes comments box on every (in/out) line
- The system tracks any TIME OFF categories you set up (PTO, Lunch, Vacation, etc.) Time Off hours are not included in totals for day or week
- Unlimited, customizable Main categories, and Sub-categories
- Up to 7 time in/time out lines per day



(click on image for larger view)

Save Cancel

### Setting the Timesheet Format: Main Categories

Your program must first select the Main Timesheet Categories it would like to use. PennSERVE requires the use of the Service and Training Categories; all other categories are optional.

Please note that once you Delete a Main Category, it cannot be undone without contacting OnCorps to reset your timesheet format.

**Main Timesheet Categories**

Main Category	
Fundraising	Delete
Lunch	Delete
Service	Delete
Time-Off	Delete
Training	Delete

### Setting the Timesheet Format: Adding and Editing Subcategories

To add or edit subcategories, first choose the main category from the dropdown menu that you would like to add. (In this instance, we have deleted Fundraising from our Main Category options, and are left with four possible categories in the dropdown menu to choose from.)

**Timesheet Sub-Categories**

Main Category	Sub-Category
Service	Service
Training	Training
Lunch	Lunch
Time-Off	

Next, type the name of the Sub-category into the text field. In this example we used “Community Building: Service Projects.” When complete, click on “Add.” If editing an existing field, click “Update.”

Main Category	Sub-Category	Hours
Service	Community Building: Service Projects	<input checked="" type="radio"/> Include <input type="radio"/> Exclude
		<input type="button" value="Add"/> <input type="button" value="Update"/> <input type="button" value="Delete"/>

**Reminder: Programs must refer to the Approved Training and Service Subcategories List to label their Service and Training subcategories.**

***Approved Training Subcategories:***

- Citizenship
- Disaster Preparedness
- Professional Development
- Service Learning

***Approved Service Subcategories:***

- |   |  |
|---|--|
| Capacity Building: Program Development & Support        | Education: Teacher Training                          |
| Capacity Building: Project Planning & Management        | Education: Teaching                                  |
| Community Building: Outreach                            | Education: Tutoring/Literacy Instruction             |
| Community Building: Service Projects                    | Environmental Stewardship                            |
| Community Building: Tax Preparation/Financial Workshops | Healthy Futures/Nutrition Education & Outreach       |
| Disaster Preparedness and Services                      | Social Services Support/Case Management              |
| Education: College Readiness, Access & Success          | Volunteer Generation/Training/Management             |
| Education: Co-Teaching/Classroom Support                | Youth Activities: After School Programs/Recreational |
| Education: Computer Instruction & Support               | Youth Activities: Mentoring/Life Skills              |
| Education: Lesson Planning                              | Other Service  |

***Setting the Timesheet Format: Choosing to Include or Exclude Service Hours***

The Version X timesheet format allows programs the decision of including or excluding categories from service hours. For instance, in the below example both the Lunch and Time-Off categories are marked as “Exclude” in the Hours column. When a member fills out his or her timesheet, any category they use on their timesheet that is marked as “exclude” in timesheet setup will NOT count towards their total required service hours.

**Timesheet Sub-Categories**

Main Category	Sub-Category	Hours	
<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Include <input type="radio"/> Exclude	<input type="button" value="Add"/>
Service	Service	<input checked="" type="radio"/> Include <input type="radio"/> Exclude	<input type="button" value="Update"/> <input type="button" value="Delete"/>
Training	Training	<input checked="" type="radio"/> Include <input type="radio"/> Exclude	<input type="button" value="Update"/> <input type="button" value="Delete"/>
Lunch	Lunch	<input type="radio"/> Include <input checked="" type="radio"/> Exclude	<input type="button" value="Update"/> <input type="button" value="Delete"/>
Time-Off	Time-Off	<input type="radio"/> Include <input checked="" type="radio"/> Exclude	<input type="button" value="Update"/> <input type="button" value="Delete"/>

**Reminder: Members may not claim service hours for lunch if they are not serving. Exceptions include members who may work with children and serve through their meal periods.**

**Reminder:** always be sure to click “Update” after changing a subcategory, and be sure to hit the “Save” button at the bottom of the page before exiting timesheet setup.

### ***Setting up Timesheet Due Dates for your Program***

Before member timesheets can be entered, Program Directors must set the program start and end date, decide how often timesheets will be due, and decide when timesheets will be due. To set this information, go to the “Tools” menu to Administrative Tools > Timesheet Dates. Alternately, after setting the timesheet format, there is an option to “Save and Setup Timesheet Dates.”

HOME	TOOLS	MANAGE RECORDS	REPORTING	FINANCIALS
<a href="#">Home</a>	Administrative Tools		Program Year Toggle	
Welco	Modules		Supervisor Toggle	
The following AmeriCorps Members h	Website and Resource Page		Export Data	
			User Permissions	
Member			Notifications On/Off	
			<b>Timesheet Dates</b>	

Clicking on Timesheet Dates will take you to below screen. Follow the instructions for setting up the Timesheet dates. Your starting date and ending date should be your program's start and end dates as recorded in e-Grants.

HOME	TOOLS ▾	MANAGE RECORDS ▾	REPORTING ▾	FINANCIALS ▾	TIME
<a href="#">Home</a> > <a href="#">Tools</a> > <a href="#">Administrative Tools</a> > <a href="#">Timesheet Dates</a>					
<b>Instructions for setting up the Timesheet Dates</b>					
<ol style="list-style-type: none"><li>1. Enter the start date for the beginning of the program year. If you need your weeks to start on a specific day, for example, Sunday to Saturday, and your program starts on a Tuesday, Set the Start Date to the Tuesday of that month. If you are going to do a monthly timesheet you MUST set the start date to the 1st or 15th of that month. If you are doing a Bi-Weekly Timesheet, you MUST set the start date as the 1st or the 15th of that month.</li><li>2. Enter the end date for the whole program year, not just the first period.</li><li>3. Select the interval for the timesheets. You can choose Weekly, Bi-Weekly, Monthly, or Tri-Monthly.</li><li>4. Choose the Due Date for your timesheet periods. This is how many days after the period ends the timesheet is due. For example, the period ends on the 15th, and you set this to 3 days it will be due on the 18th.</li></ol>					
Entering Timesheet Dates for program: <b>Test Program</b>					
<i>NOTE: Any changes made will overwrite previous timesheet dates for this program</i>					
Enter Starting Date:	<input type="text" value="08/20/2012"/>	<input type="text" value="9"/>			
Enter Ending Date:	<input type="text" value="08/19/2013"/>	<input type="text" value="9"/>			
Timesheet Period Duration:	<input type="text" value="Bi-Weekly"/> ▾				
Due Date Interval:	<input type="text" value="3"/>	days after Ending Date			
<input type="button" value="Continue"/>		<input type="button" value="Cancel"/>			

Next, enter the timesheet duration period. This sets how often the timesheets will be due; most programs operate on a weekly or bi-weekly schedule.

Finally, determine which day of the week the previous time period's timesheet will be due. Please note that each timesheet runs Monday to Sunday; for instance, requesting a Due Date Interval of 3 days means that members must submit their timesheet by the Wednesday following the previous time period.

After entering all information, click Continue. The following screen will appear below the Timesheet Dates options you just entered:

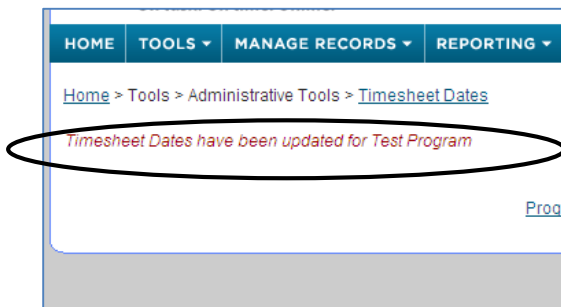
The following timesheet dates will be added for program: **Test Program**

Click **Submit** to add these timesheet dates

Start	End	Due
8/20/2012 (Monday)	9/2/2012 (Sunday)	9/5/2012 (Wednesday)
9/3/2012 (Monday)	9/16/2012 (Sunday)	9/19/2012 (Wednesday)
9/17/2012 (Monday)	9/30/2012 (Sunday)	10/3/2012 (Wednesday)
10/1/2012 (Monday)	10/14/2012 (Sunday)	10/17/2012 (Wednesday)
10/15/2012 (Monday)	10/28/2012 (Sunday)	10/31/2012 (Wednesday)
10/29/2012 (Monday)	11/11/2012 (Sunday)	11/14/2012 (Wednesday)
11/12/2012 (Monday)	11/25/2012 (Sunday)	11/28/2012 (Wednesday)
11/26/2012 (Monday)	12/9/2012 (Sunday)	12/12/2012 (Wednesday)
12/10/2012 (Monday)	12/23/2012 (Sunday)	12/26/2012 (Wednesday)
12/24/2012 (Monday)	1/6/2013 (Sunday)	1/9/2013 (Wednesday)
1/7/2013 (Monday)	1/20/2013 (Sunday)	1/23/2013 (Wednesday)
1/21/2013 (Monday)	2/3/2013 (Sunday)	2/6/2013 (Wednesday)
2/4/2013 (Monday)	2/17/2013 (Sunday)	2/20/2013 (Wednesday)
2/18/2013 (Monday)	3/3/2013 (Sunday)	3/6/2013 (Wednesday)
3/4/2013 (Monday)	3/17/2013 (Sunday)	3/20/2013 (Wednesday)
3/18/2013 (Monday)	3/31/2013 (Sunday)	4/3/2013 (Wednesday)
4/1/2013 (Monday)	4/14/2013 (Sunday)	4/17/2013 (Wednesday)
4/15/2013 (Monday)	4/28/2013 (Sunday)	5/1/2013 (Wednesday)
4/29/2013 (Monday)	5/12/2013 (Sunday)	5/15/2013 (Wednesday)
5/13/2013 (Monday)	5/26/2013 (Sunday)	5/29/2013 (Wednesday)
5/27/2013 (Monday)	6/9/2013 (Sunday)	6/12/2013 (Wednesday)
6/10/2013 (Monday)	6/23/2013 (Sunday)	6/26/2013 (Wednesday)
6/24/2013 (Monday)	7/7/2013 (Sunday)	7/10/2013 (Wednesday)
7/8/2013 (Monday)	7/21/2013 (Sunday)	7/24/2013 (Wednesday)
7/22/2013 (Monday)	8/4/2013 (Sunday)	8/7/2013 (Wednesday)
8/5/2013 (Monday)	8/18/2013 (Sunday)	8/21/2013 (Wednesday)
8/19/2013 (Monday)	9/1/2013 (Sunday)	9/4/2013 (Wednesday)

This screen shows all time periods for the program year, as well as the due date for each period. If you are satisfied with these dates, click “Submit;” if not, repeat the previous step to reset the information.

After hitting submit, you will receive the following message:



### **Member View of Timesheets**

See below for a screenshot of the member view of the timesheet.

The member selects their activity from the approved subcategories created during timesheet setup by clicking on the dropdown menu under the “Category” field.

You are entering time for period: 08/20/2013 - 09/02/2013

**This time sheet is DUE: 09/05/2013**

Tue Aug 20	Time In	AM/PM	Time Out	AM/PM	Category	Description/Activity	Total
	09:00	AM	12:00	PM	Select One		3
					Select One		0
					*** Service ***		0
					Capacity Building: Program Development and Support		0
					Training ***		0
					Training		0
					*** Lunch ***		0
					Lunch		0
					*** Time-Off ***		0
					Time-Off		0
					Select One		0

The Description/Activity field is optional for members, except if members are using the “Other Service” subcategory. In this case, PennSERVE requires that members give a brief description of their activities. Your program may choose to require that members use this field in other instances as well, such as if they serve over a certain amount of hours in a day or if their service hours are outside their normal service times. (Example – claiming service hours on a Sunday when they typically serve Monday – Friday)

**Reminder: Members must describe their activities when selecting “Other Service.”**

Note how the Total Hours field works in the upper-right hand corner in the below example. Although the member has entered 3.5 hours of activities, because one of these activities (Lunch) was marked as “Exclude hours” during timesheet setup, the member is only receiving credit for the eligible activities he completed.

**This time sheet is DUE: 09/09/2013**

Tue Aug 20	Time In	AM/PM	Time Out	AM/PM	Category	Description/Activity	Total
	09:00	AM	12:00	PM	Capacity Building: Program Development and Support	Recruiting volunteers for the parks department	3
	12:00	PM	12:30	PM	Lunch		0.5
					Select One		0
					Select One		0
					Select One		0

**Note:** If you are unsure as to how certain features and reports in OnCorps will appear to members, create a test member account. This will also allow you to create screenshots for training members in the system.

## Program Budget

### Entering the Program Budget

All programs must enter their budget into OnCorps Reports within 60 days of the program year start date. Move your cursor over Financials, then Submit Reports, and then click the Budget Link.



The Budget Page features a blank spreadsheet to fill out that will be submitted to OnCorps Reports for review by PennSERVE staff. Be sure to fill this out carefully; once it is submitted the budget cannot be edited on OnCorps, unless a Budget Modification Request is submitted. When you are satisfied with the budget, certify the budget using the checkbox, then click the Submit for Approval button at the bottom of the page.

TOTAL	\$93,815.00	\$16,800.00	\$113,830.00	\$224,445.00
Percentage	41.8%	7.49%	50.72%	
<b>TOTAL PROGRAM</b>		<b>\$224,445.00</b>		

	AmeriCorps Funds	Grantee Share
1. Grant Amount (linked to budget above)	\$93,815.00	\$130,630.00
2. Expenditures to Date (Before this report)	\$0.00	\$0.00
3. Grant Balance Available (line 1 less line 2)	\$93,815.00	\$130,630.00
4. Current Period Expenditures (linked above)	\$0.00	\$0.00
5. Grant Balance Remaining	\$93,815.00	\$130,630.00
6. Amount of This Request (current expenses)	\$0.00	\$0.00

CIICS Budget	\$93,815.00
10% Budget	\$22,444.50
<b>CNCS Admin &lt;= 5.26%</b>	
Budget	0% (OK)
YTD Actual	0% (OK)
<b>Overall Match &gt;= 35%</b>	
Budget	58.2% (OK)
YTD Actual	0% (NO)

Final Claim?  Yes  No

I certify that the amounts shown above are accurate and are consistent with the amounts approved by CNCS in my submitted grant proposal. All budgeted expenditures are in accordance with generally accepted accounting principles, OMB Circulars, and CNCS grant guidelines.

Additional Comments:

Calc Admin & Match (%) Save **Submit for Approval** Cancel

### Budget Modification Requests

All Budget Modification Requests must be submitted via OnCorps Reports. To submit a modification request, begin by moving your cursor over "Financials", then Submit Reports > Budget Modification Request.



Once in the Budget Modification Request screen, click the Request Budget Modification button.



Fill in the areas of the budget that you seek to modify in the "Modified Budget" field. To calculate the amount of change, scroll to the bottom of the page and click on the Calculate Change Amount button.

Budget Item	Original Budget				Modified Budget				Amount of Change				% Change		
	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind
<b>Program Operating Costs</b>															
A Personnel Exp	\$20,000.00	\$0.00	\$1.00	\$20,001.00	20000	0	1	\$20,001.00	---	---	---		---	---	---
Details:															
B Fringe Benefits	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	---	---	---		---	---	---
Details:															
C Travel									---	---	---		---	---	---
Details:															
C.1 Staff Travel	\$30.00	\$2.00	\$0.00	\$32.00	30	0	0	\$30.00	---	(\$2.00)	---		---	-100%	---
Details:															
C.2 Member Travel	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	---	---	---		---	---	---
Details:															
C.3 Travel Subtotal	\$30.00	\$2.00	\$0.00	\$32.00	\$30.00	\$0.00	\$0.00	\$30.00	---	(\$2.00)	---		---	-100%	---

After you have completed the Modified Budget field and clicked on Calculate Change Amount, the Total fields at the bottom of the spreadsheet will provide a recap of the changes you have made to the budget. Once you are satisfied, click Submit for Approval.



TOTAL	\$155,676.00	\$72.00	\$501.00	\$156,249.00	\$155,676.00	\$70.00	\$501.00	\$156,247.00	\$ .00	(\$2.00)	\$ .00	(\$2.00)
Percentage	99.63%	0.05%	0.32%		99.63%	0.04%	0.32%		0%	100%	0%	
TOTAL PROGRAM	\$156,249.00			\$156,247.00			(\$2.00)					

Staff Comments:

Should you realize a mistake in the Budget Modification Request after submitting, please immediately contact the PennSERVE fiscal officer to request that the Request be denied and returned so that you can correct the mistake.

### Periodic Expense Reports (PERs) and Aggregate Financial Reports (AFRs)

All PERs and AFRs must be submitted via OnCorps Reports. Both documents are found by highlighting Financials, then Submit Reports, and then choosing the appropriate link.



### PERs

After clicking the Periodic Expense Report link under Submit Reports, choose the appropriate reporting period from the dropdown menu and then press the Choose button. OnCorps will let you see which reports have already been submitted and approved.

HOME TOOLS MANAGE RECORDS REPORTING FINANCIALS TIME TRACKING DIRECTORIES CALENDAR

Home > Financials > Submit Reports > Periodic Expense Report

**Periodic Expense Report**

Select a Budget Period: **January 2011 Expense Report Submitted**

Monthly PER forms are available from the drop-down menu on the Notifications page once they are available.

Submit Reports  
View Reports  
Approve Reports  
Upload/Download Files

Budget  
**Periodic Expense Report**  
Aggregate Financial Report  
Budget Modification Request  
Program Income Report  
-Kind Other  
Forms from the list below.  
Help

January 2011 Expense Report Submitted: 08/15/2012 Approved: 08/15/2012

February 2011 Expense Report  
March 2011 Expense Report  
April 2011 Expense Report  
May 2011 Expense Report  
June 2011 Expense Report  
July 2011 Expense Report  
August 2011 Expense Report  
September 2011 Expense Report  
October 2011 Expense Report  
November 2011 Expense Report  
December 2011 Expense Report

Fill in the appropriate fields on the PER spreadsheet under the Current Expenditures field.

Budget Period: **August 2012 Expense Report**

Budget Item	Budget Total				Current Expenditures				Year-To-Date			
	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind	Total	CNCS	Grantee Cash	Grantee In-kind	Total
<b>Program Operating Costs</b>												
A Personnel Exp	\$20,000.00	\$0.00	\$1.00	\$20,001.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
B Fringe Benefits	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
C Travel												
C.1 Staff Travel	\$30.00	\$2.00	\$0.00	\$32.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
C.2 Member Travel	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
C.3 Travel Subtotal	\$30.00	\$2.00	\$0.00	\$32.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
D Equipment	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
E Supplies	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
F Consultants	\$0.00	\$0.00	\$0.00	\$0.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
G Training												
G.1 Staff Training	\$400.00	\$70.00	\$0.00	\$470.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
G.2 Member Training	\$10,000.00	\$0.00	\$500.00	\$10,500.00	0	0	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

When you are finished, scroll to the bottom of the page and click the Submit for Approval button. At any time you may save your work or calculate totals; saving or calculating your totals will NOT submit the PER for approval.

Calc Admin & Match (%) Save Submit for Approval Cancel

When any action is taken by PennSERVE staff on a PER, you will receive a notification on your OnCorps home page. This notification will indicate that your PER has either been approved or rejected.

The following PERs have been reviewed by State Commission Staff:

Budget Period	Status	Comment		
September 2012 Expense Report	Not Approved		<a href="#">Review</a>	<a href="#">✕</a>

If, after submitting a PER, you realize an error was present on the document, notify the PennSERVE fiscal officer. The PER will be rejected and sent back for editing, where you can fix the error and resubmit the PER.

After your PER is complete, you must print the page and send to the PO Box address as listed in the PennSERVE Program and Fiscal Policies Manual. Please refer to Section 5 of the Manual for more information on reimbursement.

### **Aggregate Financial Reports**

Aggregate Financial Reports are due on the following dates and must include the following PERs:

- 10/31/16 (include PERs for July\* - September)
- 1/31/17 (include PERs for October – December)
- 4/30/17 (include PERs for January – March)
- 7/30/17 (include PERs for April – June)
- 10/1/17 (include all PY '16-'17 PERs)
- 

\*Only programs with a PY '16-'17 start date earlier than August 20 should include a July PER in their 10/30/16 AFR

After clicking the Aggregate Financial Report link under Submit Reports, choose the PERs to include in the AFR as indicated above. When the appropriate PERs are checked, click the New Aggregate Financial Report button to create the AFR.

You'll also notice that the Aggregate Financial Report screen has a link entitled "Federal Instruction on How To Complete the FFR." Note that the AFR and FFR are interchangeable terms. There are further instructions below on completing the AFR, and much of the information will be automatically populated for you. However, you may want to access this link if you have additional questions or need assistance.

[Home](#) > [Financials](#) > [Submit Reports](#) > [Aggregate Financial Report](#)

### Aggregate Financial Report

[Federal Instructions on How To Complete the FFR](#)

**Create a New Aggregate Financial Report**

Select the PERs that should be included as part of this report:

July 2012 Expense Report: *submitted and approved*

August 2012 Expense Report: *submitted and approved*

[New Aggregate Financial Report](#)

OnCorps Reports automatically inputs data from your program information and the chosen PERs to complete much of the AFR; however, there are several fields you must fill out before the AFR may be submitted.

Item 1: *Federal Agency and Organizational Element to Which Report is Submitted*: Labor & Industry/PennSERVE. The PennSERVE fiscal officer submits one AFR on behalf of all PennSERVE funded programs; therefore, programs' AFRs are not sent directly to CNCS.

Item 2: *Federal Grant or Other Identifying Number*: this is your grant number as shown in e-Grants.

The screenshot shows the 'AGGREGATE FINANCIAL REPORT' form with the following fields and values:

- PERs included in the AFR: July 2012 Expense Report, August 2012 Expense Report
- 1. Federal Agency and Organizational Element to Which Report is Submitted: (empty)
- 2. Federal Grant or Other Identifying Number Assigned by Federal Agency (To report multiple grants, use FFR Attachment): (empty)
- 3. Recipient Organization (Name and complete address including Zip code):
  - Name: Test Program
  - Addr: 123 Fake Street
  - City: Harrisburg
  - State: Pennsylvania
  - Zip: 17109
- 4a. DUNS Number: (empty)
- 4b. EIN: (empty)
- 5. Recipient Account Number or Identifying Number (To report multiple grants, use FFR Attachment): (empty)
- 6. Report Type: Quarterly (selected), Semi-Annual, Annual, Final
- 7. Basis of Accounting: Cash, Accrual
- 8. Project/Grant Period From: (Month, Day, Year) 08/20/2011
- To: (Month, Day, Year) 08/19/2012
- 9. Reporting Period End Date: (empty)

Items 3, 4a, and 4b will auto complete if this information has been entered into the Program Information screen in OnCorps.

Item 5: *Recipient Account Number or Identifying Number*. This number is used internally by PennSERVE to consolidate all AFRs into one document to send to CNCS. Programs will enter an identifying number based on their program type:

- Formula Grants: C13360 + 10-digit state contract number (typically begins with 41000)
- Competitive Grants: C12391 + 10-digit state contract number (typically begins with 41000)

Item 6: *Report Type*: Quarterly, with the exception of the final AFR due in October 2016.

Item 7: *Basis of Accounting*: Please identify your basis of accounting (section is optional)

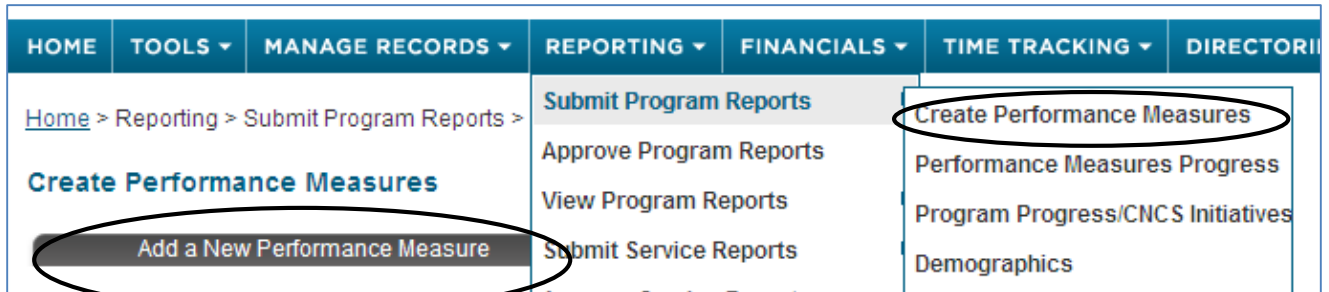
Item 8 will auto complete based on information entered into Program Information and Budget Information.

Item 9: *Reporting End Date*: Please list the last day of the month for the most recent PER attached to the report. For instance, first quarter reporting, due 10/30/16, will have a Reporting End Date of 9/30/16, as the September PER is the most recent PER attached.

After you have filled out the necessary items on the AFR, press the Submit for Approval Button at the bottom of the screen. You may save you work and come back later to complete the AFR by pressing the Save button to the left of the Submit for Approval button.

## Creating Performance Measures

Move your mouse cursor over “Reporting”, then Submit Program Reports > Create Performance Measures.



After clicking Add New Performance Measure, click the Add a New Performance Measure button.

The Add a New Performance Measure screen requires you to input information for Output, Intermediate Outcome, and End Outcome. This information must replicate exactly what was listed on a program’s grant application. The performance measure should include the specific output and outcome measures associated with it: see the sample below.

Name of Performance Measure: Academic Engagement

**Output**

ED2: Number of students who completed K-12 education programs

8280 students will participate and complete participation in in-school and after-school tutoring and mentoring, as measured by attendance logs

**Intermediate Outcome**

N/A

**End Outcome**

ED27: Number of students in mentoring/tutoring programs with improved academic engagement

6624 students will show improved academic engagement, as measured by teacher pre- and post-surveys

State Commission Staff Feedback

Save Submit for Approval Cancel

If using national performance measures, please indicate the measure number and full measure name. Please indicate the target number for the measure and what instrument(s) will be used to determine if the measure has been met.

When you are finished, scroll to the bottom of the screen and click the Submit for Approval button.

Repeat this process for each Performance Measure; all Performance Measures must be entered into OnCorps within 60 days of the program year start date. You will not be able to create Performance Measure Progress Reports until your measures have been submitted to PennSERVE and approved.

### Quarterly Progress Reports

Quarterly Progress Reports include the following reports and are due on the following dates:

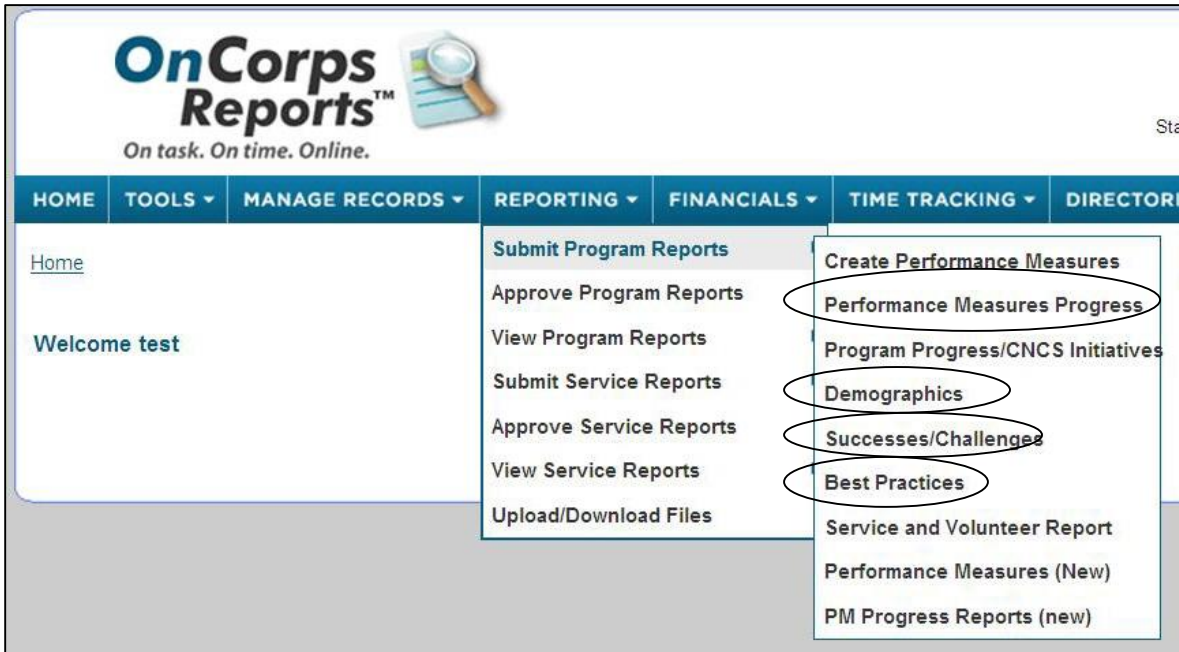
Reporting Due Date	For Time Period	Perf Meas Progress	Demographics	Successes/Challenges	Best Practices	Great Stories
11/30/2016	Start of Program - 10/31/16	X	X	X		
2/28/2017	11/1/16 - 1/31/17	X	X	X	X	X
5/30/2017	2/1/17 - 4/30/17	X	X	X		
9/30/2017*	5/1/17 - program end date	X	X	X	X	X

**\*This report will serve as the year-end progress report; the due date is subject to change based on CNCS reporting deadlines. Programs will receive additional instruction regarding this report.**

Each of the above reports is considered part of the quarterly reporting requirement, and must be completed and/or updated by the above due dates. All Quarterly Reporting information will be used when compiling mid-year and end of year reports; PennSERVE may request additional information from programs as needed.

Programs may enter information into these reports at any time during a quarter, save, and return to the report later to edit. However, all reports must be complete and submitted by each Quarterly Progress Report due date. Note that any reports without a “submit” button and simply a “save” button are able to be viewed by PennSERVE immediately after pushing “save.” PennSERVE will not review any reports until the Quarterly Progress Report due date.

Each of the required reports, with the exception of the “Great Stories” report, is accessed through the “Reporting” tab, then by highlighting Submit Program Reports.



**Performance Measure Progress**

To complete the Performance Measure Progress Report, click on Reporting > Submit Program Reports > Performance Measure Progress. From there, click on the Progress Button next to the measure on which you are reporting. This will only be possible after a Performance Measure has been approved.


**Performance Measures Progress**

Performance Measure Name	Submitted	Submitted On	Approved	Approved On	File Report
Fire Prevention	Yes	07/11/2014	Yes	07/11/2014	Progress
Improving Academic Engagement	Yes	07/11/2014	Yes	07/11/2014	Progress

[Program Web Site](#) | [Calendar](#) | [Resources](#) | [Help](#)  
 ©2010 Settanni+Co., Inc.

Scroll down to reach the reporting area for the Performance Measure. In the “Period” field, choose the appropriate quarter (Q1, Q2, ...) from the drop-down menu. Enter the quarter’s starting and end dates in the date boxes (see the chart on pg. 22 for reporting time periods). Select the bubble that most accurately describes progress towards each of the Measures listed.

In the comments box, provide the most recent data available regarding the progress for any output, intermediate outcome, or outcome measures associated with the Performance Measure. When you are finished, click Submit for Approval. If you need to save and return later to complete the Performance Measure Progress report, click Save.

Reporting Period #1:	
Period:	Q1
Starting Date:	08/20/2014 (mm/dd/yyyy) Ending Date: 10/31/2014 (mm/dd/yyyy)
Starting Measure:	<input type="radio"/> Met <input type="radio"/> Unmet <input checked="" type="radio"/> Ongoing
Intermediate Measure:	<input type="radio"/> Met <input type="radio"/> Unmet <input type="radio"/> Ongoing
End Measure:	<input type="radio"/> Met <input type="radio"/> Unmet <input checked="" type="radio"/> Ongoing
Submitted:	No
Approved:	No
Describe your programs efforts during this reporting period against this Performance Measure, both quantitatively and qualitatively.	
<div style="border: 1px solid gray; padding: 5px;">           ED2: A total of 7,398 have been engaged for the year thus far.             ED27: first post-survey not available until Dec. 31.         </div>	
 State Commission Staff Feedback	
<input type="button" value="Save"/> <input type="button" value="Submit for Approval"/> <input type="button" value="Cancel"/>	

Repeat this process for each Performance Measure. When Performance Measure Progress has been submitted for each Program Measure, this part of the Quarterly Progress Report is complete.

***Uploading additional Performance Measure documents***

Programs are strongly encouraged to report their Performance Measures using the space provided in OnCorps. However, should additional documentation be needed, programs may upload supporting documents to OnCorps.

When uploading additional documentation, programs should still fill out the Performance Measure Progress report as detailed above. In the narrative section, a description of the attached document should be provided.

To expedite PennSERVE’s review process, please name all attachments, and type out all descriptions, as follows: Program Name. Program Year. Quarter. Attachment Type.



An example is circled below:

Upload a new File/Document:

File:	C:\Documents and Settings\kwhitman\My Docu	Browse...
Program:	Test Program	
Uploaded By:	Test User 1	
Description:	Test Program. 2012. 1st Quarter. Perf Meas Attach	
<input type="button" value="Upload"/>		

### ***Demographics***

Complete the Demographics Report by clicking “Reports,” then Submit Program Reports > Demographics. Fill in each of the listed fields for the appropriate quarter, and then click the Save button. This can be edited at any time throughout the quarter, and it will be reviewed by PennSERVE staff at the end of the quarter.

Also included on the Demographics report page is a PDF file with CNCS definitions of different demographics reporting requirements.

**Note:** The YTD Total column adds all quarters together for a final total number. **Therefore, it is important that you only include non-duplicative data for the specific quarter for which you are entering information.** Each quarter’s reporting should include only new individuals served/engaged and not “double-count” individuals from previous quarters. If you serve a finite number of individuals throughout the year (for instance, members are in a classroom setting and know the number of students they will serve at the beginning of the year), fill in the data for the first quarter and then leave the rest of the quarters as “0.”



Demographic Item	Reporting Period					YTD Total
	Q1	Q2	Q3	Q4	Q5	
Applicants - # of individuals who applied to be AmeriCorps members:	0	0	0	0	0	0
Leveraged volunteers - # of volunteers recruited, coordinated, or supported by your programs:	0	0	0	0	0	0
Disadvantaged children and youth - # serving as leveraged volunteers:	0	0	0	0	0	0
College students - # of leveraged volunteers enrolled in a degree-seeking program:	0	0	0	0	0	0
Baby Boomers - # of individuals born between 1946 and 1964 who serve as volunteers:	0	0	0	0	0	0
AmeriCorps members - # who participated in disaster services projects:	0	0	0	0	0	0
AmeriCorps members - # certified in disaster preparedness and response:	0	0	0	0	0	0
AmeriCorps members - # available for deployment in support of any disaster:	0	0	0	0	0	0
Disadvantaged children and youth - # served:	0	0	0	0	0	0
Children and youth of incarcerated parents - # served:	0	0	0	0	0	0
Individuals mentored - # of individuals mentored:	0	0	0	0	0	0
Independent living services - # of clients who received independent living services:	0	0	0	0	0	0
Disaster services - # of local disasters to which AmeriCorps members have responded:	0	0	0	0	0	0
Disaster services - # of individuals affected by disaster receiving assistance from members:	0	0	0	0	0	0

[Save](#) [Cancel](#)

### Successes/Challenges

Click on Successes/Challenges under Submit Program Reports to complete the Successes/Challenges Report. On this screen, click Add New Success/Challenge. If you have completed any Successes/Challenges in the past, you can view them here.

[Home](#) > [Reporting](#) > [Submit Program Reports](#) > [Successes/Challenges](#)

[Page Tools](#) [Create PDF](#)

[Add New Successes/Challenge](#)

Choose the current Reporting Period from the drop-down menu, and then choose the Successes/Challenges category from the Progress Category menu. Enter your Success/Challenge information into the Narrative Text box, and then press Save to finish the report.

The Successes/Challenges report for each quarter should include your program's enrollment and retention rate for the year so far.



## Successes/Challenges

Reporting Period:

Progress Category:

Narrative Text

Successes - this quarter, test program 1 successfully teamed with a neighboring Senior Corps program to work on the 9/11 Day of Service together. Blah blah blah, information on leveraging resources.

Challenges - test program 1 has had an issue with members not entering their timesheets correctly. Staff are designing a training for our members, and this should remedy the issue.

Enrollment Rate: 90% Summer members have not started service yet.

Retention Rate: 100%

### **Best Practices**

The Best Practices Report is found under Submit Program Reports. Click the Best Practices Report link to complete this report. After clicking this link, click the Add New Best Practices button to reach the Best Practices Report page.

Once on the Best Practices page, create a name for the practice (example is circled below). Also fill in the submission date and reporting period for which you are submitting the practice.

## Best Practices

Name:  Date:   (mm/dd/yyyy) Reporting Period:

Description:

Test Program 1 has an excellent recruitment process, and each year receives over 100 applications for its 25 positions. We work with both of our local colleges, with the local CareerLink and Youth Council, and with five surrounding school districts to identify young adults who would like to serve. We make informational packets available to all of our referral sources, and when possible have current members speak with potential members about serving in Test Program 1.

Our recruitment process is strengthened by our excellent website, which you can visit at [www.testprogram.com](http://www.testprogram.com). The website includes detailed information about our service opportunities, the application process, and clearly outlines what is expected of our members. We continuously upload new pictures of current projects.

7197 characters left

## Great Stories

Program directors have the choice of submitting their own Great Stories, or allowing members to submit stories and then “promoting” the stories.

To submit a Great Story as a program director, click on “Reporting,” then select Submit Service Reports > Great Stories. Click on “Add Great Story.”



To share a Great Story with PennSERVE that a member has written, click again on “Reporting,” then select Submit Service Reports > Promote Member Stories.

After selecting Promote Member Stories, you will be able to view all Great Stories submitted by members. To share a story with PennSERVE, choose the member story you would like to share and click “Edit.”

Program	Member	Story Name	Date	Reporting Period	Promoted Story?	Attachments	
Test Program	Mike Wazowski	Helping out at the Public Works	09/20/2013	Q1	No	0	<a href="#">Edit</a>

My service at the public works has not only benefitted me, but has also benefitted the kids that I am serving.

Next to “Send to the State Commission/Promote Story,” select “Yes,” and then “Save.” The story will now be available to state commission staff.

Name:  Date:  (mm/dd/yyyy)

Reporting Period:

Send to State Commission/Promote Story?:  Yes  No

Please describe your great story here...

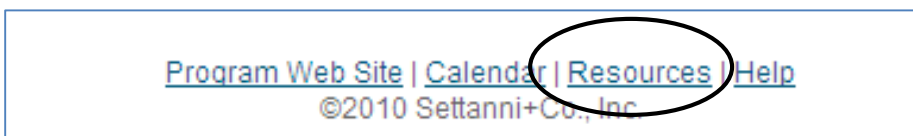
8000 characters left

ABC

## Resources Available in OnCorps

### Sharing Resources via OnCorps

OnCorps allows programs to share information with all user levels via the Resources page; PennSERVE can also share Resources with all programs via this page as well. The Resources page is accessed at the bottom of the home screen.

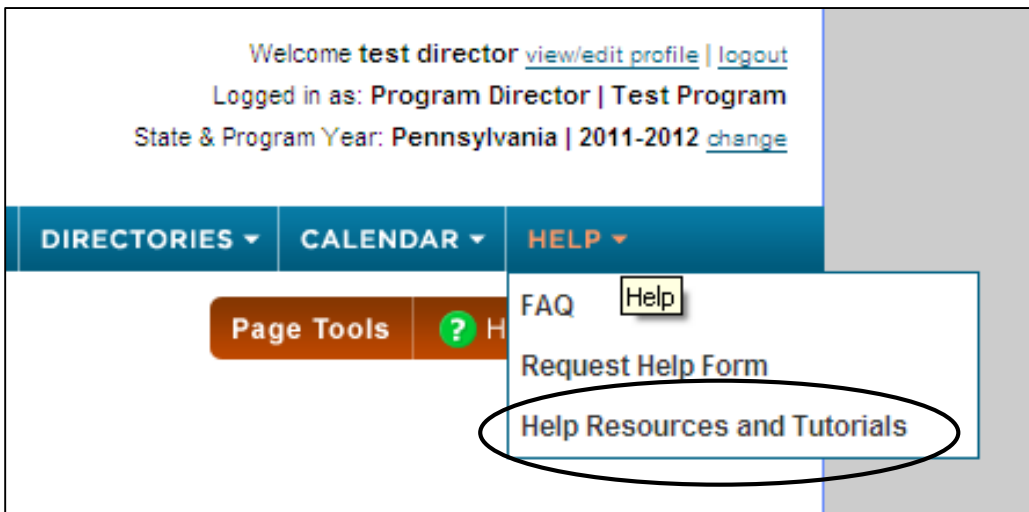


PennSERVE will make documents available to programs on the Resource page. Programs will be notified of any important information that has been uploaded by PennSERVE via their home screen.

Program Directors may also upload documents to their own program’s internal Resource Page. OnCorps has detailed instructions on this function: click Help > Help Resources and Tutorials > and scroll down the Program Director Tutorials. Under Miscellaneous, you will find “Update Web Site and Resources.”

### **Help Tab and Tutorials**

OnCorps has a variety of resources available for all user types. Resources include PDFs and short videos. Should the Help Resources and Tutorials not answer your questions, OnCorps can be contacted through Request Help Form.



Questions regarding technical issues and site functionality should be directed to OnCorps via the “Help” tab > Request Help Form on your OnCorps home screen.

Questions regarding PennSERVE policy on OnCorps usage and regarding reporting requirements or submitted reports should be directed to PennSERVE at Pennserve@pa.gov.