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KYSRC: Finance Approval User's Guide

Document Purpose

This document provides Kentucky school districts details on the process of viewing, verifying and approving Finance data for the **Kentucky School Report Card** using the **Kentucky School Report Card Data Approval and Collection Tool (DACT)**.

Specifically, this document:

- Walks school and district staff through how to access and navigate the Kentucky School Report DACT
- Helps *school-level staff* understand how to enter the required finance data for the Kentucky School Report Card into the collector item section.
- Helps *district-level staff* understand how to view, verify, and approve or flag their data for the Kentucky School Report Card
- Helps district staff understand how they can monitor progress as their schools enter their data.

Let's get started!

NEW for 2020 - Finance Domain District Narrative

Each district has a unique financial base. Looking at the data alone on the School Report Card does not explain the financial situation of the district. New for 2020, districts have the ability to add a narrative section to the finance domain to help ensure that parents, community members and researchers have a more complete picture of the financial situation in your district by providing a brief financial overview. More information on how to add a narrative can be found [here](#).

About the School Report Card Data Approval Tool

The **Kentucky School Report Card DACT** is a secure version of the public-facing **Kentucky School Report Card** site. The **DACT** allows "permissioned users" (those granted access by KDE or their district) the ability to login and view their data prior to public release. The **DACT** also allows permissioned users to enter data in certain collection fields and verify the data for the Kentucky School Report Card reporting.

NOTE: Permissioned users will have a slightly different experience when signed into the **DACT** than when visiting the public-facing **Kentucky School Report Card**.

Accessing the Kentucky School Report Card Data Approval Tool

To learn how to access the Kentucky School Report Card Data Approval and Collection Tool, you can watch this video or follow the instructions below:

Log into the Kentucky School Report Card **DACT** using your school district email address and your Windows/Office365 password. Please ensure that you have your email address and password ready before proceeding to the next section.

SAFETY TIP: Do not access the Kentucky School Report Card DACT via a public computer. Using a public computer could unintentionally provide access to sensitive data for non-permissioned users.

Additionally, do not share credentials because the account gives access to a wide variety of tools and data.

Steps to Access Your Account

1. Navigate to Kentucky School Report Card Data Approval Tool (https://kysrc.clarity.brightbytes.net/tools) using the latest edition of your browser type (e.g., Chrome, Edge, Firefox) Please note:
   - Older browsers may not function properly. Older browsers are defined as those no longer maintained/updated by their developing company (such as older versions of Internet Explorer, which are no longer supported by Microsoft)
   - You may see the "Clarity" platform logo. Clarity is the platform upon which the Kentucky School Report Card is built.

2. Click on "Login Here."
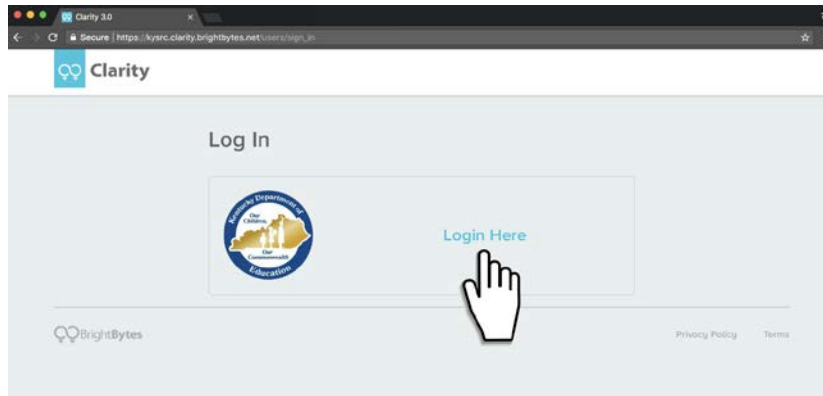
3. Enter or select your school district email address. You will be taken directly to the landing page if you have previously signed into Office365. If you have not signed into Office365, you will be asked to enter your password; use your Windows/Office365 password.
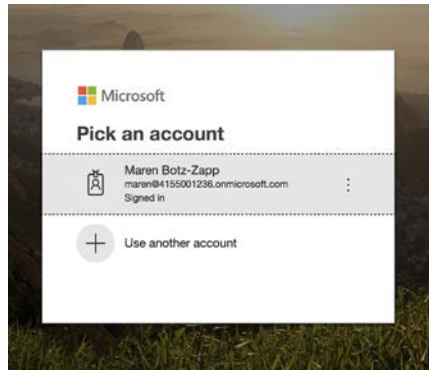

NOTE: The URL you are using to log into the **DACT** (https://kysrc.clarity.brightbytes.net/tools) takes you directly to the **Tools** page of the Clarity platform where you can access the **DACT**. If you happen to exclude the /tools portion of the URL, you will need to click on the **Tools** icon at the top of the page.
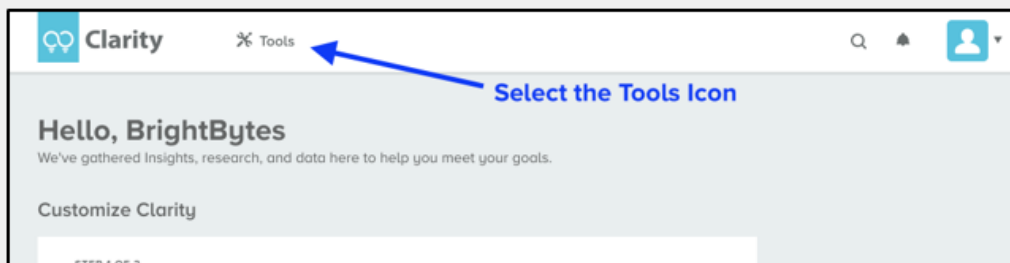
Additionally, if you're logging into the **DACT** on a mobile device, click on the three stacked horizontal lines in the upper right corner (the menu icon) and select the **Tools** option.
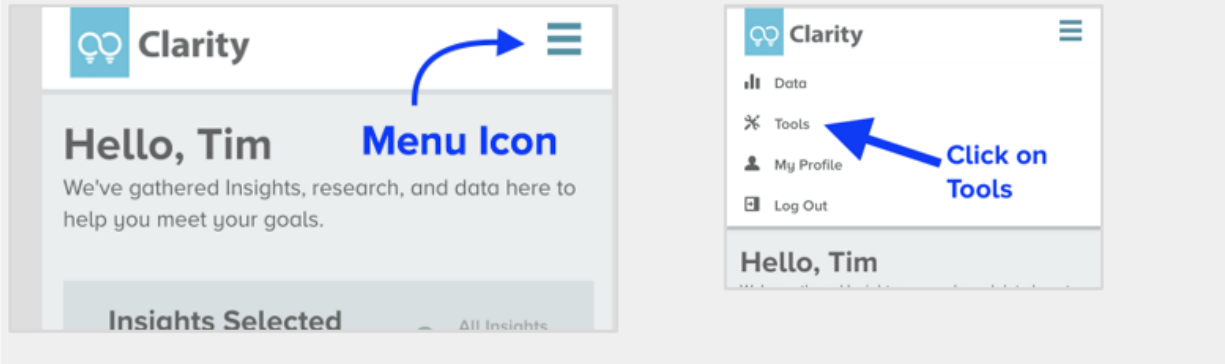

Once on the **Tools** landing page, click the sideways arrow (>) on the far right to access the **DACT**.
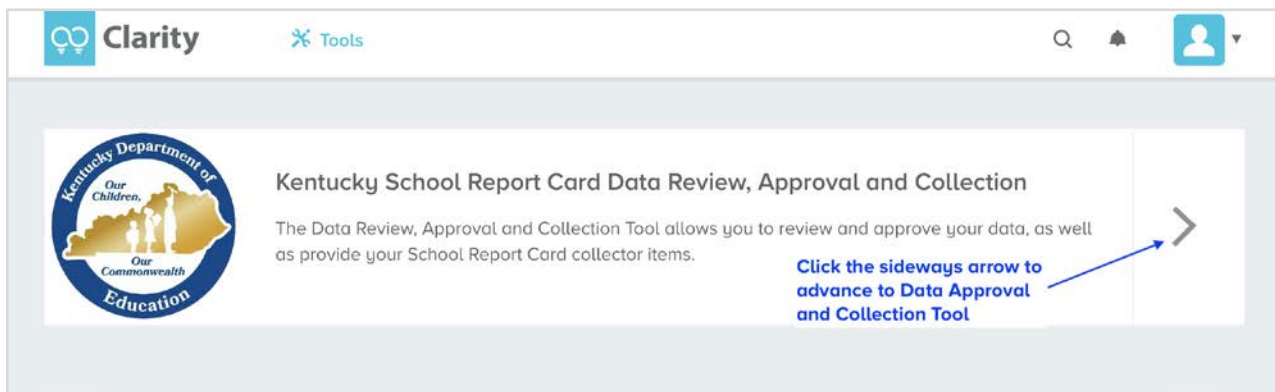
What if I am responsible for more than one school or district?

If you are responsible for approving data from more than one organization, you can toggle between them in the platform. Before navigating to the **DACT**, hover over the blue avatar in the upper-right corner of the webpage to view the menu. Then select the organization you wish to view. When you navigate to the **DACT**, you will then see the relevant organization's data for review.
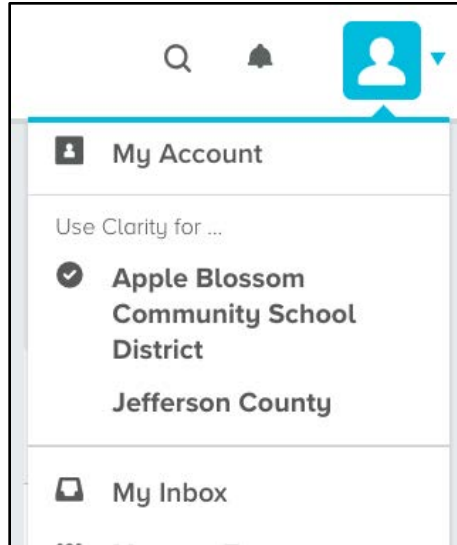
Getting Help

Help Logging Into the Kentucky School Report Card Data Approval Tool

If you experience issues accessing your account, please contact BrightBytes Support in one of the following ways:

- Email BrightBytes Support at support@brightbytes.net
- Call BrightBytes Support at (877) 433-4036

Help Getting Correct Level of Access to Data

If you can access your **DACT** account but feel you do not have the appropriate level of access (i.e., you are unable to see the appropriate data or take the necessary approval actions), please contact your district Web Apps Admin Point of Contact (WAAPOC) to ensure appropriate access has been set up.

If you are unsure how to reach your WAAPOC, locate their contact information via the Directory | Open House on the Kentucky Department of Education's website (http://openhouse.education.ky.gov/Directory). Navigate to the appropriate district and scroll to the bottom of district screen to locate the name and email address of your WAAPOC. For additional assistance, reach out to the KETS Service Desk at ketshelp@education.ky.gov or via telephone at (866) 538-7435.

If the problem persists, please contact support in one of the following ways:

- Email BrightBytes Support at support@brightbytes.net
- Call BrightBytes Support at (877) 433-4036
- Email the KETS Support Desk at ketshelp@education.ky.gov for assistance with district set up of the appropriate level of access.

Help On Using the Kentucky School Report Card Data Approval Tool

Once you have successfully logged into the **DACT**, click on the **Help** link at the top right of the page to access the BrightBytes Help Center.
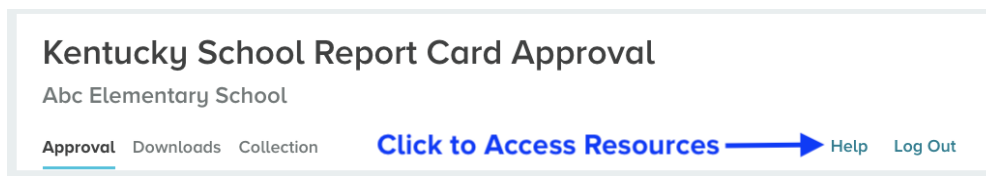
From here, you can select a topic or use the search feature to locate resources designed to assist with the **DACT**.
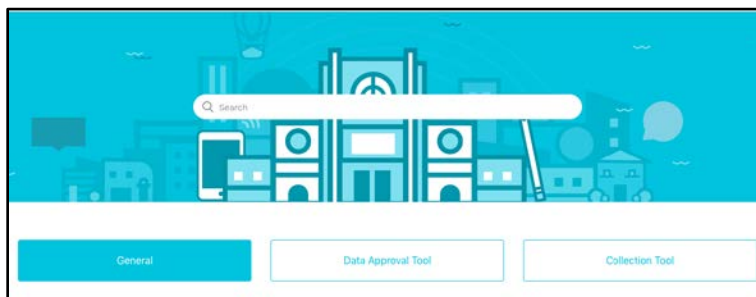
In addition, KDE has posted the following 5 guidance documents on our **SRC Resources** page:

- *Overview of 2018-2019 Finance SRC Requirements* – This is a guidance document that outlines what is expected of districts for the Financial Transparency domain – entry of school-level spending per student and verification of district-level finance data.
- *Identify Expenditures for Y19* – This is a guidance document that directs districts how to pull the data from the MUNIS database.

- *Spending Per Student Calculation Workbook* – This is an Excel workbook that will help districts with the school-level spending per student calculation. It provides the formulas to pro-rate the expenses held at district level down to school level.
- *18-19 Membership for Spending Per Student Calculation* – This is an Excel document that provides the 18-19 membership districts will need to produce the school-level spending per student calculation.
- *SRC Finance Domain Glossary* – This document provides the definitions for each data point in the Finance domain.

The Kentucky School Report Card Data Approval Dashboard

The **Approval Dashboard** is the landing page for the **DACT**. This page shows your progress toward completing the collection fields data entry and the overall data approval process.

The next section of this document will go through the various components of the **Data Approval Dashboard**.

The Approval Link
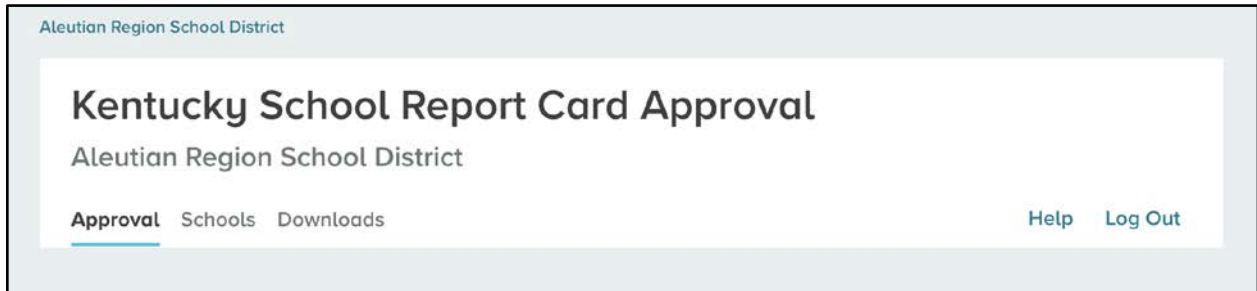
At the top of the school-level view of the **Kentucky School Report Card Approval** page you will see an *Approval* link. Clicking this link at any time will take you back to the Data Approval Dashboard

The Approval Summary Section

In this section, there is a breakdown of the progress toward completing the data approval process.

If viewing the page at a district level, the progress shown is representative of the district and not for each school.

NOTE: Data in the **Kentucky School Report Card** is grouped into several high-level categories, called *domains*. These categories are centered around critical questions a visitor to the site might have and are designed to help them more easily find data.

In the Approval Summary section, you can easily see:

- The total number of Domains that need to be **Approved**

- The number of Domains that are currently **Not Approved**
- The number of Domains that have been **Approved**
- The number of Domains that have been **Flagged**

For the purpose of this document, we will only focus on the Finance domain.

The Domains for Approval Section

This area provides you an easy way to see a variety of information about your organization's progress through the approval process.

In this section of the Data Approval Dashboard you can see the:

1. Domain Name: (e.g., School Overview, Academic Performance, Educational Opportunity).
2. Domain Approval status:
   - **Unreviewed**: Indicates that the data has not been looked at or has not yet been validated for accuracy
   - **Flagged:** Indicates that there are potential inaccuracies with the data
   - **Approved**: Indicates that the data has been validated for accuracy

3. Updated On: This shows the date for the most recent modifications made to the the approval status for that domain

4. Updated By: This shows the email address of the person who made the most recent modification to the approval status for that domain.

5. For the Financial Transparency domain only: you see link to Edit District Narrative. More information on this will be provided below.

Data Validation and Approval Process

This section will help you understand the process of reviewing district and school-level Financial Transparency data and will help you understand how to flag or approve your data.

Step 1: Accessing District Level Financial Transparency Data

From the district-level Data Approval Dashboard, click on the sideways arrow (the > symbol) at the right side of the Financial Transparency domain you wish to view to be taken to the underlying data for this domain.

Step 2: Navigating the Data Pages

Once on the data page for a given domain, you will find several layers of data through which to navigate.

- The *subdomains* of data are listed along the left side of the page.
- *Data Categories* (if needed) are listed as tabs
- Each data category contain a set of individual *Data Points*
- Each of these data points is may be displayed different visualizations (i.e. as a donut or bar chart, or listed in a table format)

KDE has posted the following 5 guidance documents on our **SRC Resources** page:

- *Overview of 2018-2019 Finance SRC Requirements* – This is a guidance document that outlines what is expected of districts for the Financial Transparency domain – entry of school-level spending per student and verification of district-level finance data.
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- *18-19 Membership for Spending Per Student Calculation* – This is an Excel document that provides the 18-19 membership districts will need to produce the school-level spending per student calculation.
- *SRC Finance Domain Glossary* – This document provides the definitions for each data point in the Finance domain.

Should you find any issues with your data, please flag the data as outlined below. BrightBytes will work with KDE to facilitate a refresh of the data and will notify you when the refreshed data will be visible in the DACT.

Step 3: Approving or Flagging Your Data

After validating the data within the finance domain, click on the *Approval* link at the top left of the page. It will take you back to the Data Approval Dashboard where you will be able to either "Flag" or "Approve" your data.

NOTE: Finance data will only be flagged or approved at the district level. The only school level data that needs to be validated is the collector items. Instructions for validating collector item data are found later in this document.
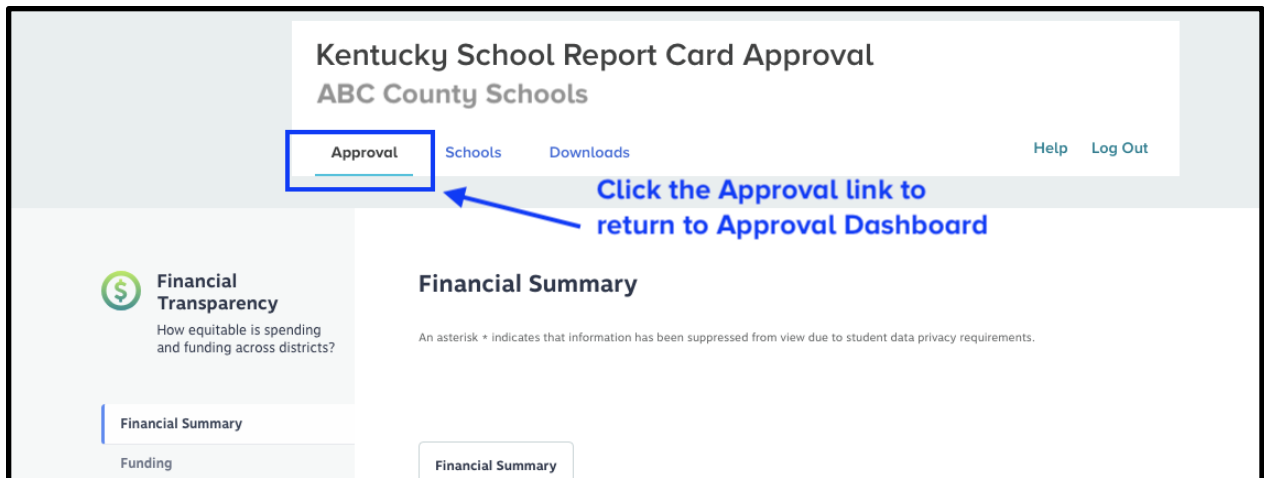
Approving Your Data

If all data within a domain is accurate, you are now ready to *Approve* your data at the district level.
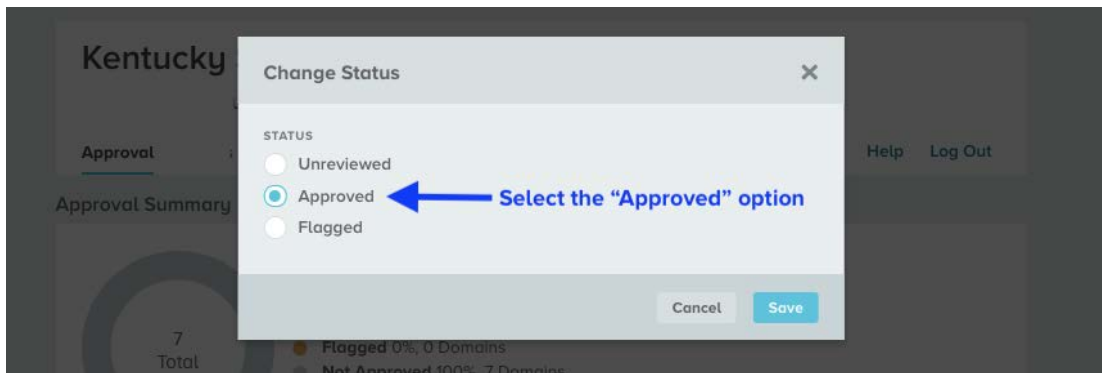
To *Approve* any domain of data:

1. Click the box in the status column for the Financial Transparency domain.

2. A window will appear providing you the option to select a status of "Unreviewed," "Approved" or "Flagged." Change the status to "Approved."

3. Click the Save button to submit the change and return to the Approval Dashboard.

NOTE: You can return at a later time and modify the status again if needed.

Flagging Your Data

If you find errors or inaccuracies in any data table with a domain, you should flag the domain for your school or district.
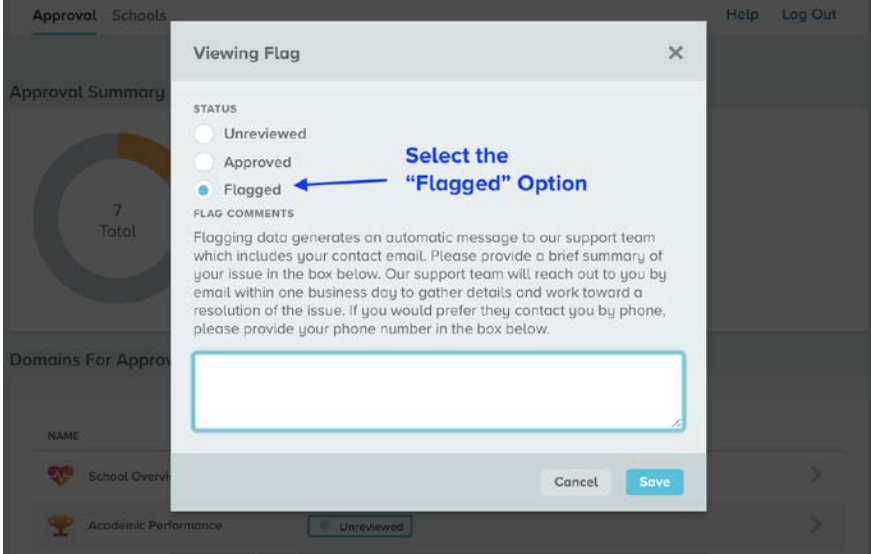
To *Flag* a data domain:

1. Click the box in the status column for the appropriate domain.

2. A window will appear providing you the option to select a status of "Unreviewed," "Approved," or "Flagged." Change the status to "Flagged."

3. Please provide a brief - but specific - summary of why you are creating this flag. Including the following details will help expedite the support process:
   - The name of the Data Subdomain
   - The name of the Data Category Tab
   - The name of the Data Point
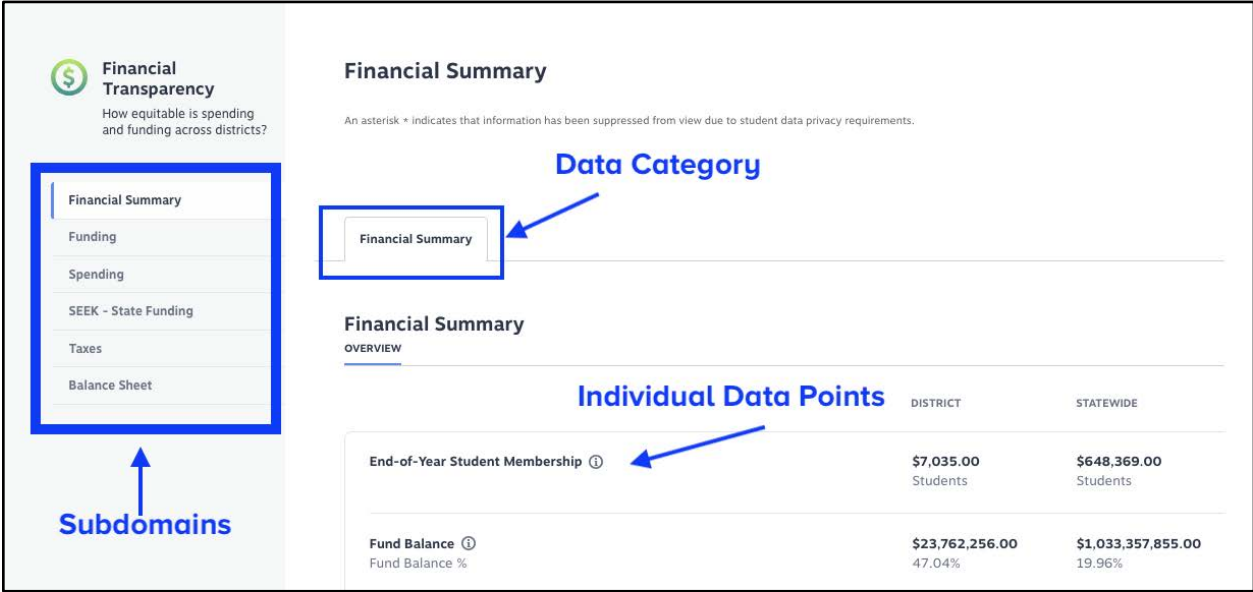
4. Click the Save button to submit the data approval status and return to the Approval Dashboard.

After you have flagged your data:

- BrightBytes Support will contact you via phone or email within 24 business hours to work with you to understand and resolve the issue.
- If the issue necessitates a new data upload from KDE, BrightBytes Support will work with the appropriate KDE staff to review the issue(s) reported and, if necessary, facilitate a refreshed dataset.
- BrightBytes Support will notify you as soon as the data issue is resolved. At that time, you can expect to see your data within 24 hours. If you do not see updated data within 24 hours, please contact BrightBytes Support (support@brightbytes.net) or by phone at (877) 433-4036.
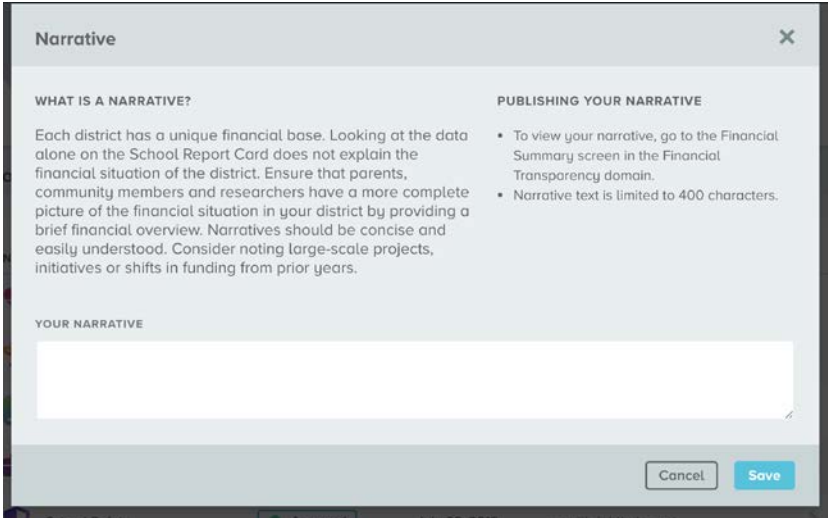
NEW for 2020 - Finance Domain District Narrative

Each district has a unique financial base. Looking at the data alone on the School Report Card does not explain the financial situation of the district. Ensure that parents, community members and researchers have a more complete picture of the financial situation in your district by providing a brief financial overview. Narratives should be concise and easily understood. Consider noting large-scale projects, initiatives or shifts in funding from prior years.
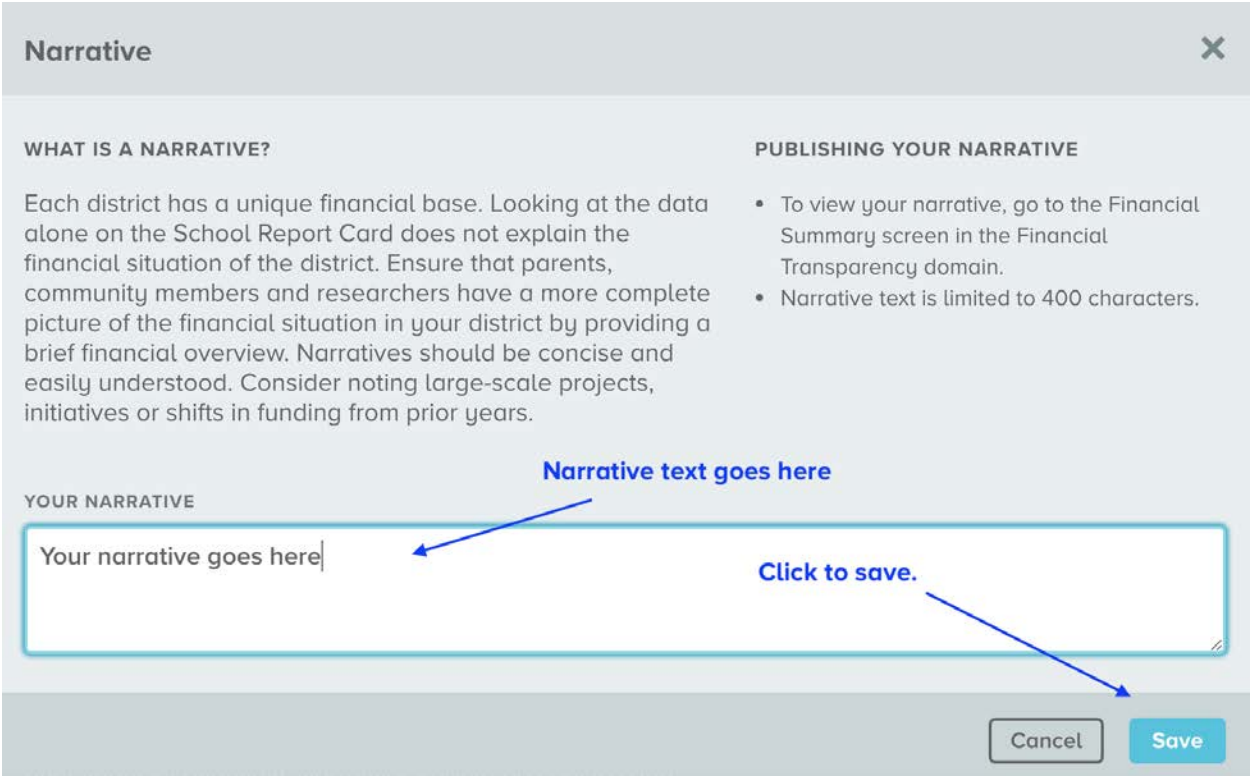
Creating or Editing your Narrative

To create a narrative, click the "Edit District Narrative" link from the data approval dashboard.

Once your click the link, you will see a window like the one below:

You can begin to enter your narrative in the text field provided. Once your narrative is complete, click the Save button.

NOTE: If you do not click "Save" and close this window, your narrative will not be published and will not be saved for future editing. If you erase the narrative and click "Save" - your narrative will no longer appear on the summary page of the Financial Transparency domain.

Previewing District Narrative

At this time your narrative will be viewable by clicking on the sideways arrow next to the Financial Transparency domain on the data approval dashboard. This will take you to the summary page of the Financial Transparency domain.

The image below is an example of how the narrative will appear on the KYSRC.

Monitoring School-Level Collector Item Entry Process

If you are a district-level user and want to monitor the data entry progress for individual schools, you have two options. You can either view overall progress in the School Breakdown table, or you can track and view responses in the downloadable Collection Data Report. Below is the process for a district-level user to monitor the collector item entry progress for individual schools,

Monitoring Progress in the School Breakdown Table

Step 1: Click the Schools link from your district level Data Approval Dashboard
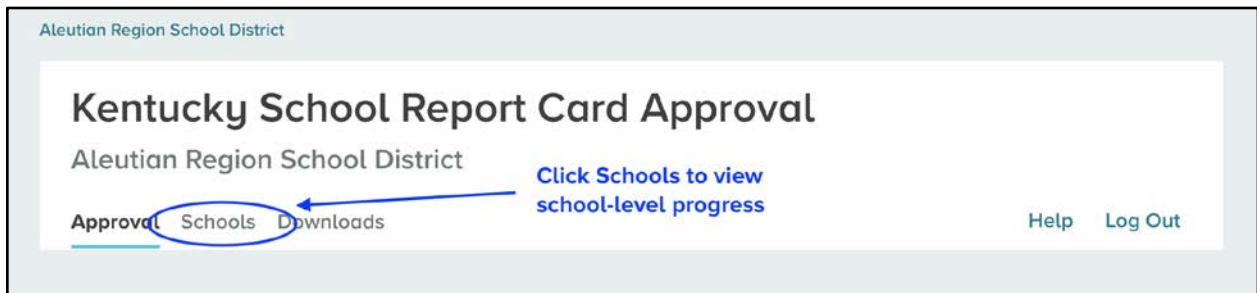
Clicking the Schools link will take you to the School Breakdown Table. This table provides district personnel with a way to track the progress schools are making toward completing the collection entry process.

Below is a detailed explanation of each column/feature in the Breakdown table of the *Schools* view:

- **Name:** The name of the schools in your district.
- **Collection Status:** Each school's progress toward entering their data into the collection fields.
- **Approval Status:** The status for the approval all data domains. The status for this field can be one of the following:
  - **Not Started:** The data has not been viewed or it has been viewed but no change was made to the approval status.
  - **Started:** The approval status for one or more of the domains at this school has been modified to approved or flagged. However, at least one of the data domains has yet to be approved.
  - **Approved:** All data domains have been approved.

NOTE:
- Columns in the Breakdown table are sortable by clicking on the column header.

Step 2: Filter to the Financial Transparency Domain

By default, the filter is set to All Domains. Clicking on the words "All Domains" will open a dropdown menu allowing you to change the filter setting from All Domains to Financial Transparency.
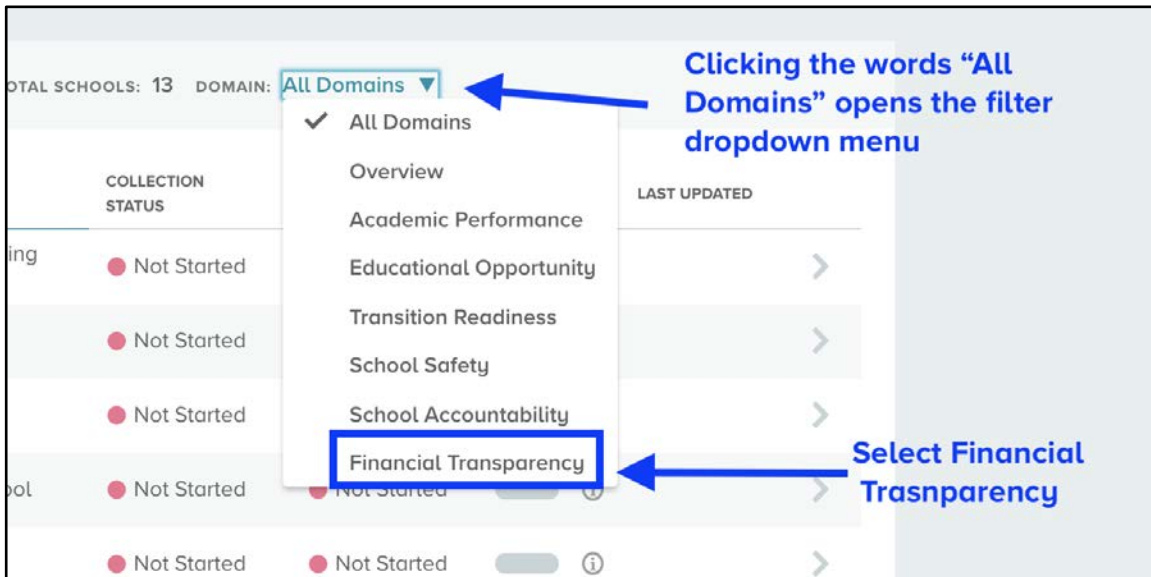
Step 3: View the progress of schools in the Collection Status column

The *Collection Status* of a school for can be:
- Done: All the required collector item data for the school has been entered and submitted.

- Started: Some, but not all, of the required collector item data for the school has been entered and submitted.
- Not Started: None of the required collector item data for the school has been entered and/or submitted.
- Not Applicable: This school is not an A1 school and is not required to submit finance collector item data.

Tracking Collector item Progress using the Collection Data Report

A report is available to help districts monitor the progress of their schools' data approval process. To access this report, follow these steps:

Step 1: Make sure you are on the School Breakdown page or the district-level Approval and Collection Tool dashboard
Step 2: Click on the Downloads Link from any page of the Data Approval Tool
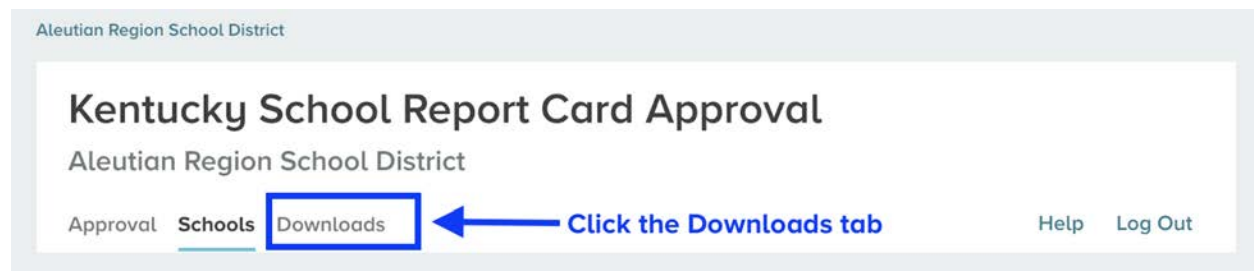
Step 3: Open the Report and Navigate to the Finance Data
- Finance data can be found in columns CG - CM
- If using Excel, it will make it easier to focus on the financial data if you:
  - Select the View
  - Select the options to *Freeze Top Row* and *Freeze First Column*
- You should easily be able to see which schools have or have not entered the financial data.
- Additionally, you should be able to look for data issues that may need additional attention.

School Report Card Data Approval Contacts:

If you need any additional assistance with using or accessing the School Report Card Data Approval tool, or have questions about the data being displayed, contact BrightBytes or KDE using the contact info below:

BrightBytes Support Contacts
Email: support@brightbytes.net
Phone: (877) 433-4036
Help Videos: https://www.youtube.com/channel/UCWKz67GcNu0DTte4eXH1I5A

KDE Support Contacts

The Glossary and the resources provided by KDE should allow districts to pull the proper reports from MUNIS in order to validate the data in the DACT.

Should you find any issues with your data, please flag the data as outlined earlier in this document. BrightBytes will work with KDE to facilitate a refresh of the data and will notify you when the refreshed data will be visible in the DACT.