



DATE: May 23, 2024  
TO: Organizations funded by the CCDDDB and CCMHB for PY25 and/or PY26  
FROM: Lynn Canfield, Executive Director  
SUBJECT: **Changes in Agency Reporting**

### **Purpose:**

This memorandum presents an update on recent changes to the application and reporting system, along with revised reporting categories and timelines.

### **Background:**

Each quarter, agencies use the online system to share five reports related to each program funded by the CCDDDB or CCMHB:

- Service Activity to track utilization measures and offer commentary.
- Residency and demographic data on clients new that quarter.
- Expenses and revenues for the program year up to the end of that quarter.

Following the second and fourth quarters, financial reports include explanations of variances greater than 20% and minimum \$100 of budget, per expense category.

After the second quarter, agencies complete and upload a brief report on progress in CLC Plan action areas. At the end of the year, they prepare a more detailed CLC Progress Report.

A report on Performance Outcomes is also shared after the program year closes. Once again, we will use the Evaluation team's suggestions for improving this year-end report.

### **Changes to Registration, Application, and Reporting:**

The following are recent changes to registration and application forms/process and to demographic, residency, and financial reports, to take effect for PY25 contracts. A change in report deadlines will be implemented for PY26.

- **New Registrations:** EMK Consulting has set up a 'dashboard' so that our staff may check on the progress of any new registration efforts throughout the open period. We will not be able to test it until the PY26 cycle starts, but we will add a warning about the auto-generated email to the application instructions document.
- **Application Expense Form Calculator:** The Expense form calculator has been updated so that it updates and compares budget totals (all three columns) each time the forms are saved, which may be done multiple times before submitting. In addition to removing the unhelpful caution, this will allow agency users to check their work throughout the process.

- **Application Program Plan Narrative Text Limits:** Limits appear in the relevant text boxes of the application’s Program Plan Narrative form, and warnings appear at the top of that form identifying text boxes with limits exceeded and by how much. EMK Consulting has added these ‘exceeds limits’ statements to the agency view, as we had originally intended.
  
- **Application Budget Narrative Text Limits:** EMK Consulting has increased the capacity of text boxes in this form to maximum of 2,000 words and expanded the space to show all of them. In some cases, this still might not be adequate, so an upload option can be agreed on with staff (uploads are not always easy to find, so our staff will need to be notified.)
  
- **Demographic and Residency Report Completion:** Each category in these reports has a numeric box, allowing analysis across programs and years. We have eliminated the requirement to enter zeroes in demographic and zip code categories. Forms can be submitted with boxes skipped if no clients ‘checked the box.’
  
- **Language Use (a new category) Options:**
  - Arabic
  - ASL (any dialect or variety)
  - English
  - French
  - Q’anjob’al
  - Spanish
  - My preferred language is not listed [option to identify it]
  - Not Available
  
- **Age Category Options:**
  - 0-6
  - 7-12
  - 13-18
  - 19-59
  - 60-74
  - 75+
  - Not Available
  
- **Race/Ethnicity (categories now combined) Options:**
  - African American/Black
  - Asian/Asian American
  - Latina/Latine/Latino/Latinx
  - Middle Eastern/North African
  - Multi-Racial

Native American/First Nations/American Indian  
Native Hawaiian/Pacific Islander  
South Asian  
White  
My race/ethnicity is not listed [option to identify it]  
Not Available

- **Gender Category Options:**

Agender  
Genderfluid  
Man  
Non-binary  
Woman  
My gender is not listed [option to identify it]  
Not Available

- **Residency Category Options:**

60949 Ludlow  
61801/61802/61803 Urbana  
61815 Bondville  
61816 Broadlands  
61820/61821/61822/61824/61825/61826 Champaign  
61840 Dewey  
61843 Fisher  
61845 Foosland  
61847 Gifford  
61849 Homer  
61851 Ivesdale  
61852 Longview  
61853 Mahomet  
61859 Ogden  
61862 Penfield  
61863 Pesotum  
61864 Philo  
61866 Rantoul  
61871 Royal  
61872 Sadorus  
61873 Saint Joseph  
61874 Savoy  
61875 Seymour  
61877 Sidney  
61878 Thomasboro  
61880 Tolono  
My zip code is not listed here [option to identify it]  
Not Available

- **Variance Threshold (2<sup>nd</sup> and 4<sup>th</sup> Quarter Expense Reports):** The threshold for required comments has been increased. Explanations will be required for financial variances greater than 20% and \$500, per line.
- **Capital Equipment Purchase Threshold:** Capital equipment cannot be charged to the Equipment expense category and instead belongs as a Miscellaneous Expense. A higher threshold is more practical and aligns with current IRS guidelines. Purchases of equipment may be recategorized, with a new threshold of \$2,500.

We understand that even positive changes will take some time, so the first year of use of these new data categories and variance thresholds will be a transition year. It may take time for all to adjust data collection tools, and this could impact future analysis of results.

*The final change will not start until PY26.*

- **Quarterly Report Deadlines:** For PY2026, the first, second, and third quarter report deadlines will be the last Wednesday (rather than Friday) of the month following the quarter (October, January, April) and shift the fourth quarter and year-end reports to the last Wednesday (rather than Friday) of August. While this will not take effect for PY25, contracts for PY25-PY26 will have specific details on deadlines matching other PY2026 contracts.