



ARCHS' Online Reporting/Invoicing Portal Orientation Guide & FAQs

How do I access the new portal?

**-There is one link to the portal. The link does not change each reporting period.
(Please save/bookmark for easy reference).**

<https://bit.ly/ARCHSPortal>

Purpose

ARCHS' staff reviews more than 1,300 funded partner reports and invoices each year. Having documents submitted via 15 individual ARCHS' staff emails, at different times by various partner staff, was proving to be very cumbersome and unwieldy. The goal of the new portal is to streamline the process and improve communication.

In addition, ARCHS' staff wanted to create opportunities to collect more frequent feedback from partners throughout the fiscal year. The COVID-19 pandemic has encouraged all of us to find ways to create easier on-line/virtual options. The portal combines the submission of reports and invoices into one system. It also adds convenient links to submit stories/images and in-kind data that are also requirements of contracts with our funded partners.

Most importantly, by garnering quantitative and qualitative information, ARCHS can advocate for continued and expanded program funding and resources.

Feedback

-Partners answer a few questions to let ARCHS know how things are going.

ARCHS annually conducts mid-year partner meetings and end-of-year surveys to gather information. The new portal will offer ARCHS' partners additional opportunities throughout the year to provide real-time feedback to assist in improving ARCHS' strategic support. ARCHS now joins the United Way, STL MHB, County Children Services Fund, and other area funders in offering an online portal.

Reporting

-Partners upload required reporting documents.

ARCHS does not have a singular report template. ARCHS' primary funder is the State of Missouri, and it has varying reporting requirements depending on the grant. Currently, ARCHS receives grant reports from its funded partners in Word/Excel/PDF files. The portal will allow these files to be uploaded and sent to the assigned ARCHS' grant representative. ARCHS' grant representatives will provide partners with any required reporting templates in Word/Excel/PDF formats.

Invoicing & leveraged tracking

-Partners upload required invoice form and supporting documentation.

-How we calculate "leveraged" dollars.

Since required reports are tied to invoices being paid, the new portal merges these together. The invoice form in the contract should be used as a cover sheet, and any supporting documents (receipts, etc.) should accompany it. Partners should scan/PDF the entire set of documents and upload.

Partner program managers/staff and their financial staff/CFOs should coordinate with one another to have their reports and invoices completed and submitted via the portal to meet ARCHS' required deadlines.

As well, it is important to note that the invoice form is how we track partner "leveraged" data. The invoice form shows the actual cost of the program vs. the amount requested from ARCHS. The difference between the two is how we calculate the leveraged amount.

In-kind (Required to submit quarterly)

-Partners report in-kind (donated from a third party) via online form.

Over the years, ARCHS has emphasized the importance of tracking "leveraged and in-kind" data from our partners. We need to know what additional funding are partners contribute to the ARCHS' funded program and what additional items/services are donated to the program by a third party? For our funded partners, knowing the true "value" of your program helps ARCHS advocate on your behalf at local, Jefferson City, and Washington DC funding tables.

Why is this important?

As one of Missouri's 20 official Community Partnership organizations, documenting how federal/state funding is "matched" with local resources is one of our key measures of success. In FY 2021, ARCHS and our partners had a \$33.4 million impact on the region – providing vital education and human service programs. Here's how that is broken down:

- \$13.6 million - ARCHS core funding and grants issued to funded partners
- \$19.8 million - Additional funds/resources provided by ARCHS' funded partners

In past years, a significant portion of ARCHS' leveraged (additional program funding provided by partner) and in-kind (donations from a third-party) data was entered at the very end of the year. Additionally, the in-kind data was bundled and attributed to the funded partner in total.

This year the state is requiring ARCHS to submit quarterly leveraged/in-kind data. We also need to know who is donating the items and services to our partners. Did the Zoo make a presentation, or did a specific company donate supplies? If partners are using other funds to augment their ARCHS' grant, that counts as leveraged, so please document that too!

ARCHS' new online reporting/invoicing has a convenient link to our in-kind tracking form. Partners should work with their ARCHS' grant representative throughout the year to make sure they are providing as much leveraged/in-kind data as possible in real time. ARCHS understands some data may not be available until year end, but any data we can load early in the year will help ensure nothing is left on the table.

Stories & Images (Required to submit quarterly)

-Partners complete online form/attach images.

-Begins with second quarter (Oct-Dec).

-If you have stories from the first quarter, please submit retroactively.

While data is important, we all know that images and stories are powerful. The new portal will have a link to our Partner Story Submission (<https://bit.ly/ARCHSStory>). This provides an easy way for our partners to showcase the impact of your programs by uploading stories and images (pictures and videos).

In FY 2022, ARCHS is requiring partners to submit stories/images at least quarterly – 4 times per year – unless directed otherwise by your ARCHS' grant representative. Of course, ARCHS encourages more frequent submissions as opportunities arise. **THE MORE THE BETTER!**

Stories can include first person testimonials from clients as well as summaries of program achievements/results/case studies/events. Partners also can submit stories/images created for your own web and social media platforms about your ARCHS' funded activities. Please keep your ARCHS grant representative aware of any program events and success stories we should be aware of.

When do we start using the portal?

The portal is now available to submit your monthly (September) or quarterly (July to September) reports/invoices depending on your ARCHS contract. Contact your ARCHS grant representative if you have questions.

What should I do first?

We recommend you first watch the Portal Orientation Video. It provides an overview of the submission process. Please do not submit “test” submissions. Also, please have your documents scanned and ready to upload. Partner program and financial staff should discuss how to best coordinate using the portal and submission of the required reports and invoices.

File upload sizes

For reports, you may upload up to 5 files, 50MB each.

For invoices/documentation you may upload a 25MB document.

Can I stop and re-start my portal submission?

YES!

You can stop and restart your portal submission by providing your email, and a link will be sent to you. **You can share the link with others in your organization** (such as the CFO/financial staff), so they can complete their portion **BEFORE HITTING the SUBMIT** button. Refer to the **Portal Training Video** for further directions.

Notifications

The portal will submit the uploaded information and completed questionnaires directly to assigned ARCHS staff and copy any partner staff that have been identified.

Deadlines

ARCHS contracts outline when required partner reports and invoices are due (monthly or quarterly). The portal prompts users to choose the current reporting/invoicing period.

Report/Invoice edits

There may be occasions when your ARCHS grant representative asks you to make adjustments/changes to documents after they have been submitted through the portal. In these instances, follow the directions/guidance of your ARCHS grant representative. They will ask you to submit these edited documents directly to them via email, NOT the portal.

Apricot

The new portal does not change the use of ARCHS Apricot data system. ARCHS staff will still enter data the same way. Any of ARCHS' partners submitting data into Apricot should continue to do so as directed by their ARCHS grant representative.

Storage

The portal is NOT a document storage system. ARCHS and partner staff should file/store any documents uploaded/submitted in their own file management systems (SharePoint, etc.).

Technical support & assistance

ARCHS' grant representatives will continue to be the primary contact/liaison with its funded partners. ARCHS' Strategic Services team will work with the designated internal grant representatives to troubleshoot any issues and help provide any additional technical assistance/training.

Additional information

-You can learn more about the new portal via these resources that are located on ARCHS' website at: <http://www.stlarchs.org/funded-partner-resources.html>

- Portal Training Video
- Portal Training Guide
- Partner Resources Guide

