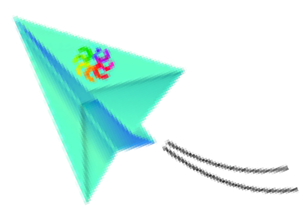
Online reporting User Guide

BREAKFAST CLUB OF CANADA

July 2019 update



Welcome to Breakfast Club of Canada's brand new online reporting system!

By transitioning to the online reporting system, you will no longer be required to email or fax your Excel spreadsheet reports to your Club representative each month. Your Club representative will be able to automatically access your reports once they have been submitted in the system. Be sure to read this document in its entirety before completing your first report.

You can access the online video tutorial here : http://www.breakfastclubcanada.org/how-to-complete-online-reports/

To be clear

Food Delivery Clubs: Breakfast Club of Canada delivers food directly to the school program

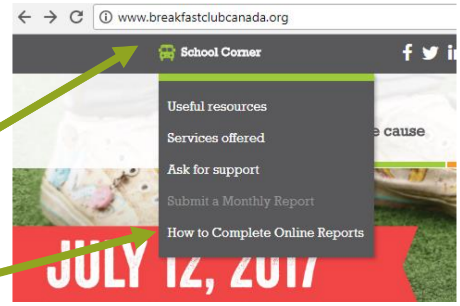
Financial Support Clubs: Breakfast Club of Canada provides financial aid for food purchase to the school

Before getting started:

1- **Reports must be submitted monthly** for the intire school year, from September to June inclusively and in that order.
2- Please submit your report by the 15th of the following month. i.e. Complete and submit your September report by October 15th.
3- Online reports will be analyzed by trimester according to this following timetable.
   a. First trimester (September, October, November)
   b. Second trimester (December, January, February)
   c. Third trimester (March, April, May, June)
4- Failure to submit your reports in a timely fashion, in addition to submitting incomplete reports, may create delays in processing your next grant installment payment.

Link to access to the Online reports : **https://onlinereports.breakfastclubcanada.org/**

Tip: For quick access, add the link to your favorites list**.**
You can also access the online reports via the Breakfast Club of Canada website, in the School Corner menu in the top left corner.

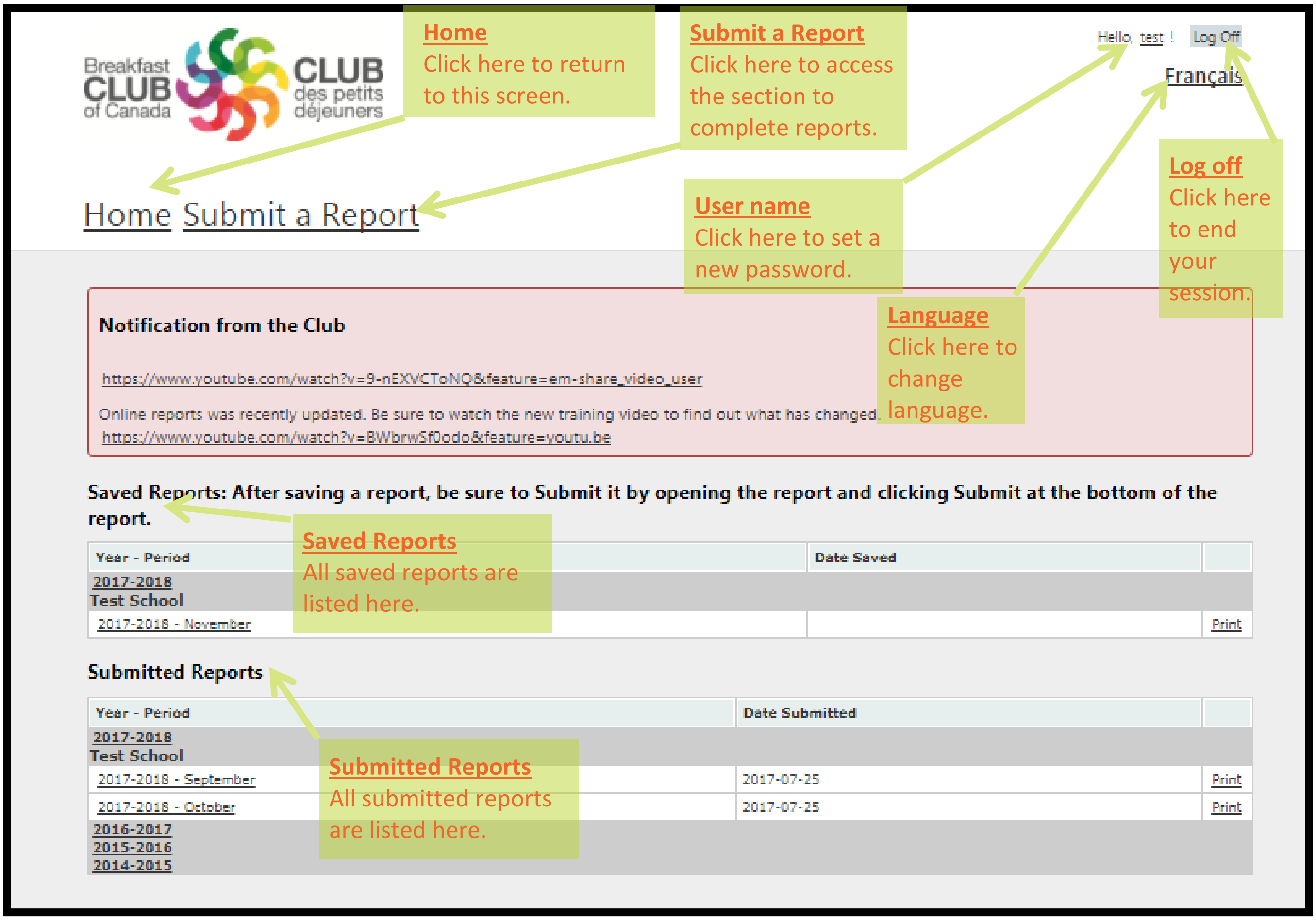


School Corner
Click on Submit a Monthly Report

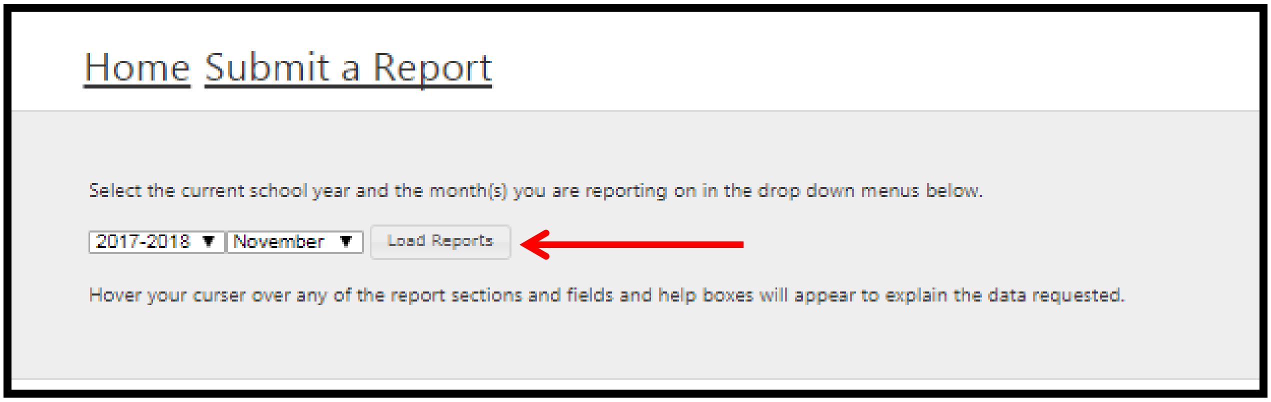
Step 1: Logging in to the System

Enter the login information provided by your regional coordinator.

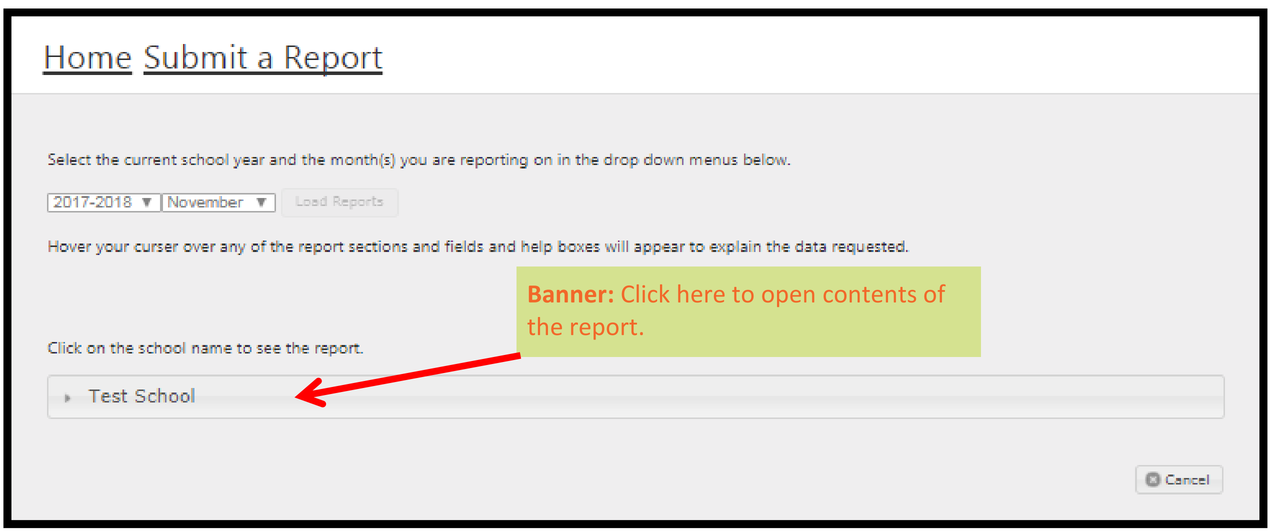
Step 2: Getting to Know the Home Screen



Step 3: Complete a Report Section



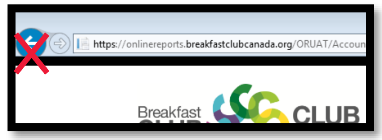
Select the month or reporting period to report on from the scroll down menu. Click on *Load Reports*.
Make sure the **current year** is also selected.
Click anywhere in the grey banner to expand the contents of the report.



Step 4: Completing the Report

Important reminders:

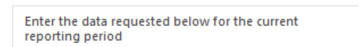
- Use the dot (.) instead of the comma (,) as the decimal
- Use your mouse or the tab key to move around the form, never use the Enter key



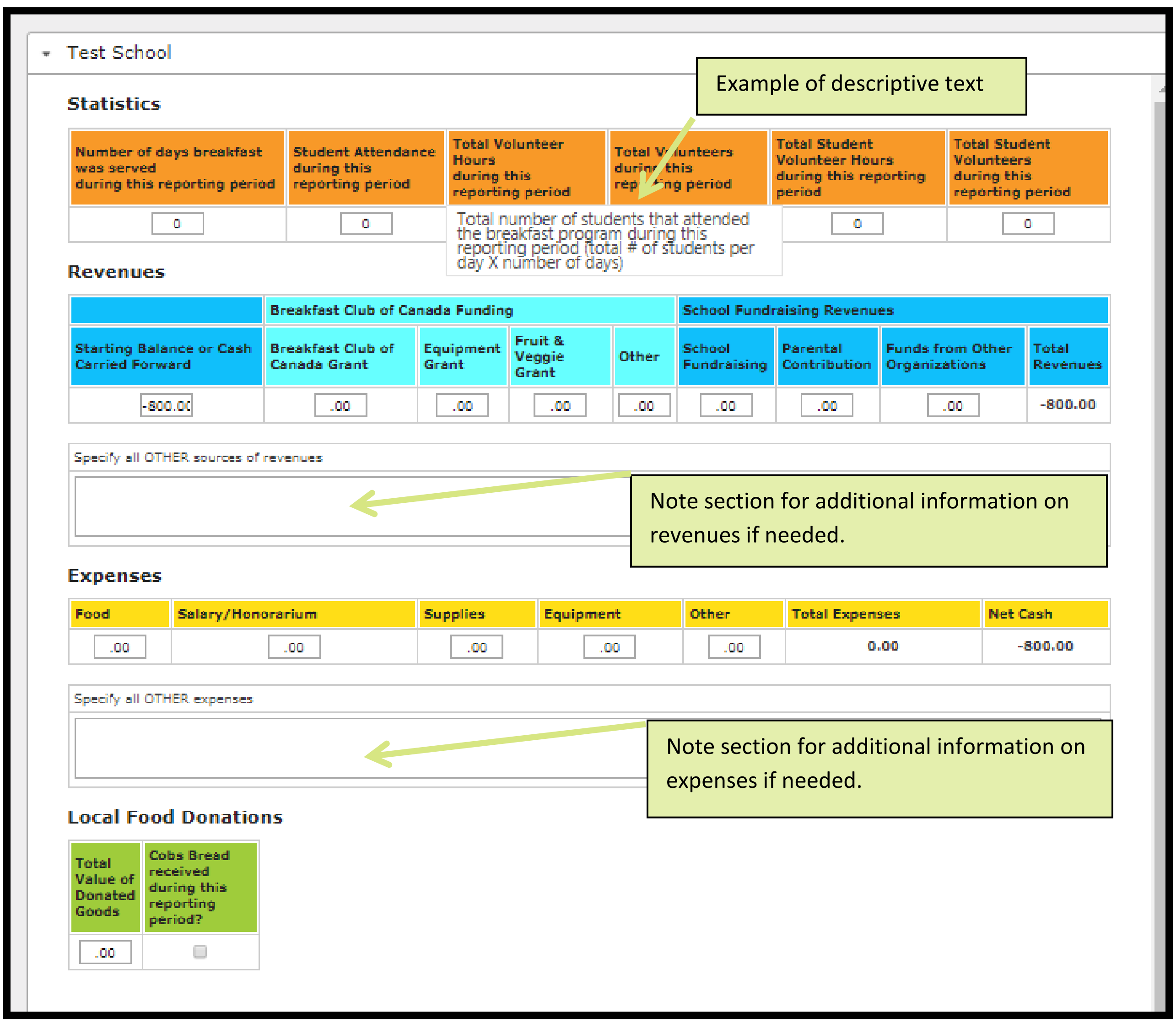
- Do not use the BACK function in your browser
- Do not use the F5 key to refresh your report

- Make sure only one user at a time accesses your school's online report

Enter the data requested.



Note that if you hover over a section title or a field name a descriptive text box will appear. Inside each help box, more detailed instructions explain precisely the type of data required. Consult pages 5 – 6 of this guide for complete list of field description.



Test School

Example of descriptive text

Statistics

Number of days breakfast was served during this reporting period	Student Attendance during this reporting period	Total Volunteer Hours during this reporting period	Total Volunteers during this reporting period	Total Student Volunteer Hours during this reporting period	Total Student Volunteers during this reporting period
0	0			0	0

Total number of students that attended the breakfast program during this reporting period (total # of students per day X number of days)

Revenues

	Breakfast Club of Canada Funding				School Fundraising Revenues			
Starting Balance or Cash Carried Forward	Breakfast Club of Canada Grant	Equipment Grant	Fruit & Veggie Grant	Other	School Fundraising	Parental Contribution	Funds from Other Organizations	Total Revenues
-800.00	.00	.00	.00	.00	.00	.00	.00	-800.00

Specify all OTHER sources of revenues

Note section for additional information on revenues if needed.

Expenses

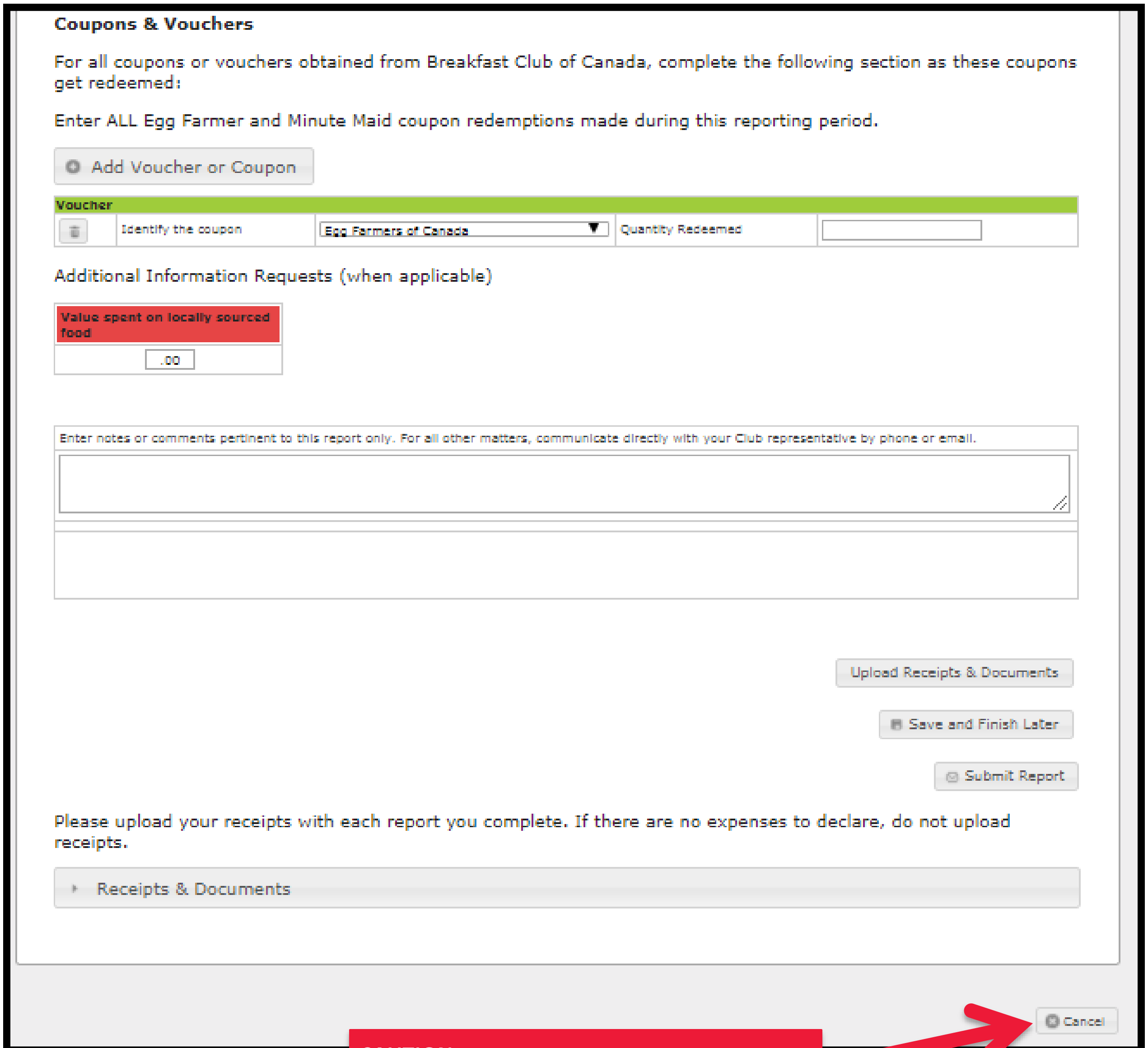
Food	Salary/Honorarium	Supplies	Equipment	Other	Total Expenses	Net Cash
.00	.00	.00	.00	.00	0.00	-800.00

Specify all OTHER expenses

Note section for additional information on expenses if needed.

Local Food Donations

Total Value of Donated Goods	Cobs Bread received during this reporting period?
.00	☐

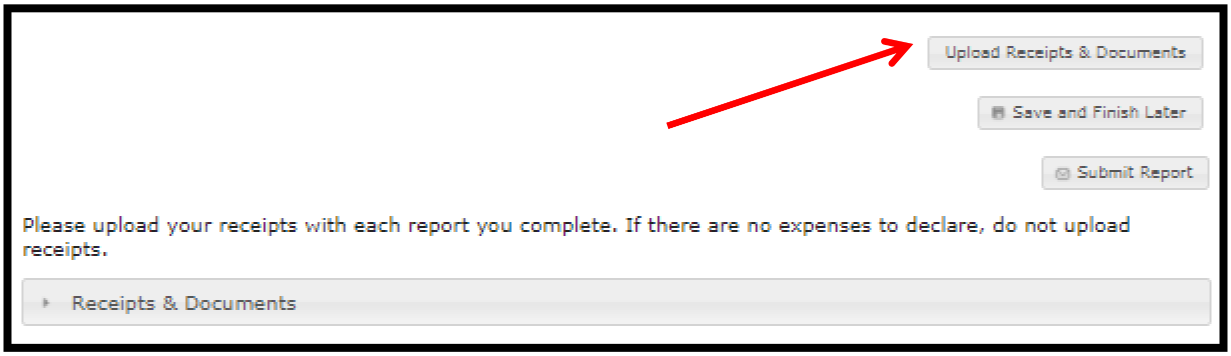


CAUTION
If you click on CANCEL, you will erase all the data in the report.

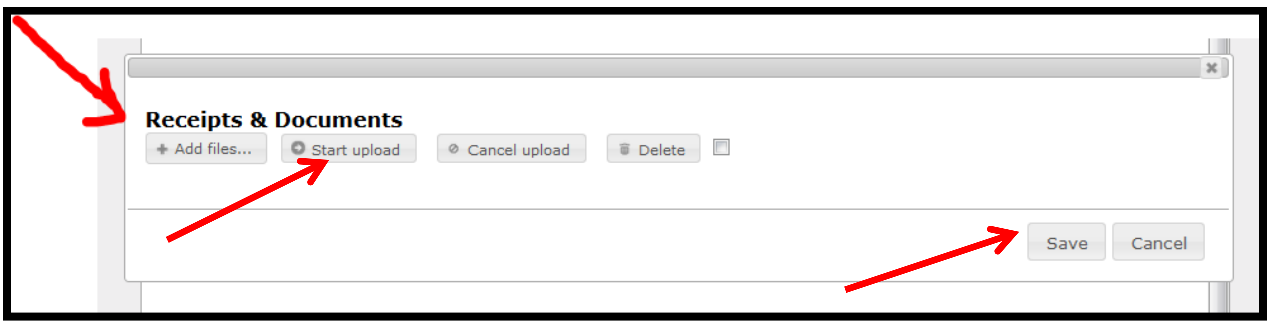
Step 5: Uploading your receipts

The Club requires that your milk receipts, deposit stubs, payment tracking and other purchase receipts be attached to your monthly report.

To upload copies of your receipts, simply click on *Upload Receipts & Documents* at the bottom right.



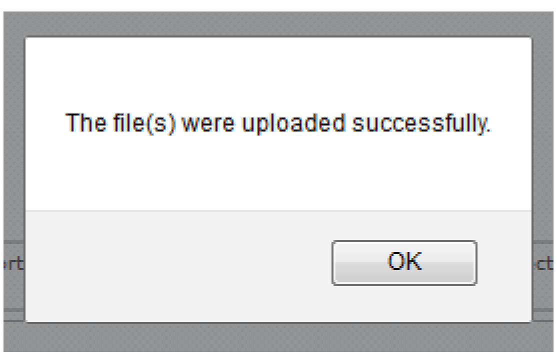
The following text box will open



Click on ***Add Files.*** Your operating system will then redirect you to access your files from your computer or network. Select the file(s) you wish to upload and click **Start Upload**.

Note that multiple files can be selected for simultaneous upload. Once all documents have been uploaded, click on ***SAVE.***

This message confirms your upload was successful:



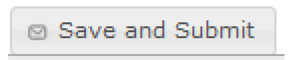
Once your document(s) are uploaded into the report, your regional coordinator will be able to access it for review.

There is a MAXIMUM file size of about 4 MB or 4000 KB per file. If you get an error message while trying to upload files, it's because you have exceeded the maximum file size. You may need to split your document into two separate documents to reduce the file size.

Step 6: Saving and Submitting a Report

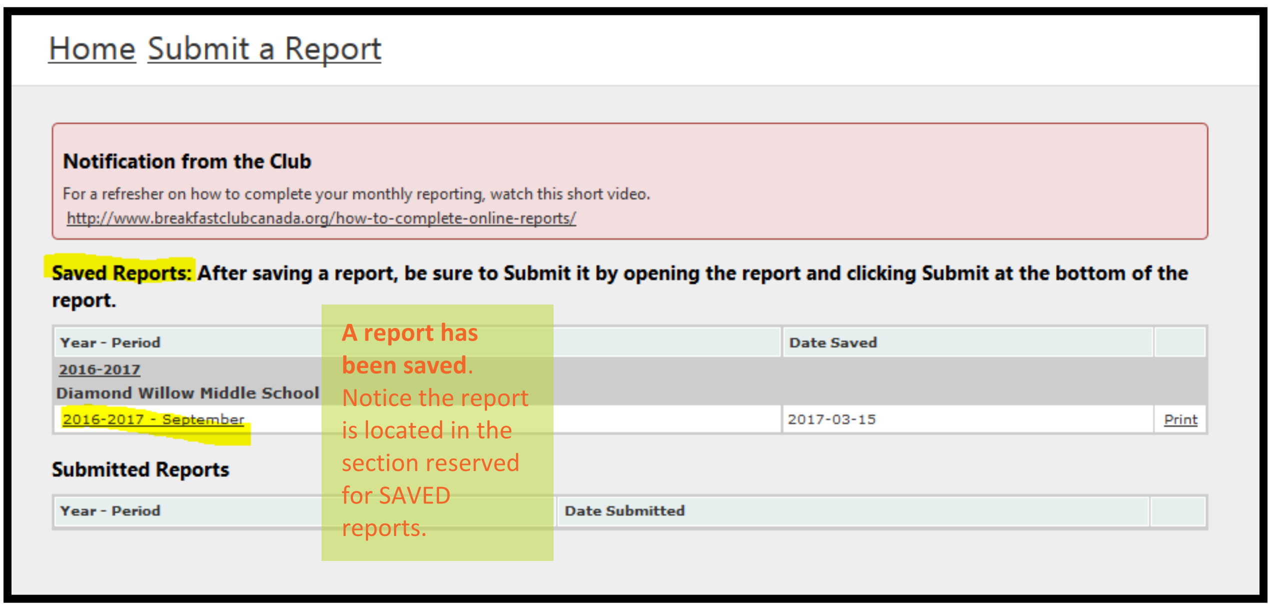
If unable to complete the report in one sitting, this option allows you to return to the report later to finish completing.

Once a report is considered complete, you **MUST** click **Save and Submit** in order for your Club representative to be notified that the report has been submitted. Failure to **submit** your reports may cause delays in issuing your grant installment payments. Note that it is **not** possible to submit next month's report until previous report has been **SUBMITTED**.



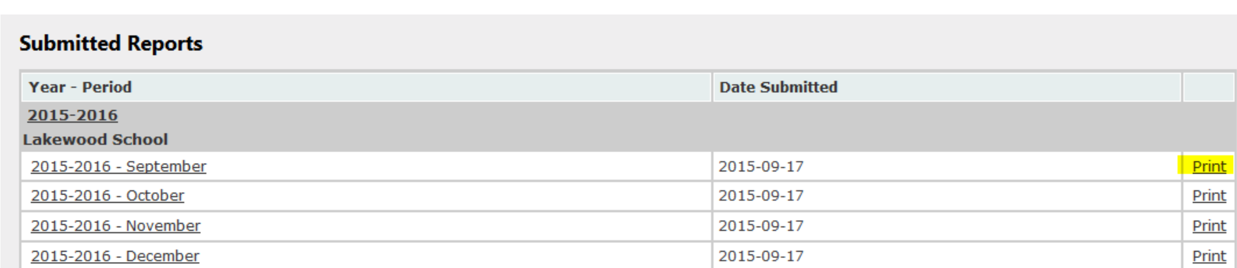
Click Reports to return to the previous screen if you wish to complete another report.

WARNING: Clicking Cancel erases all the data entered and returns user to previous screen.



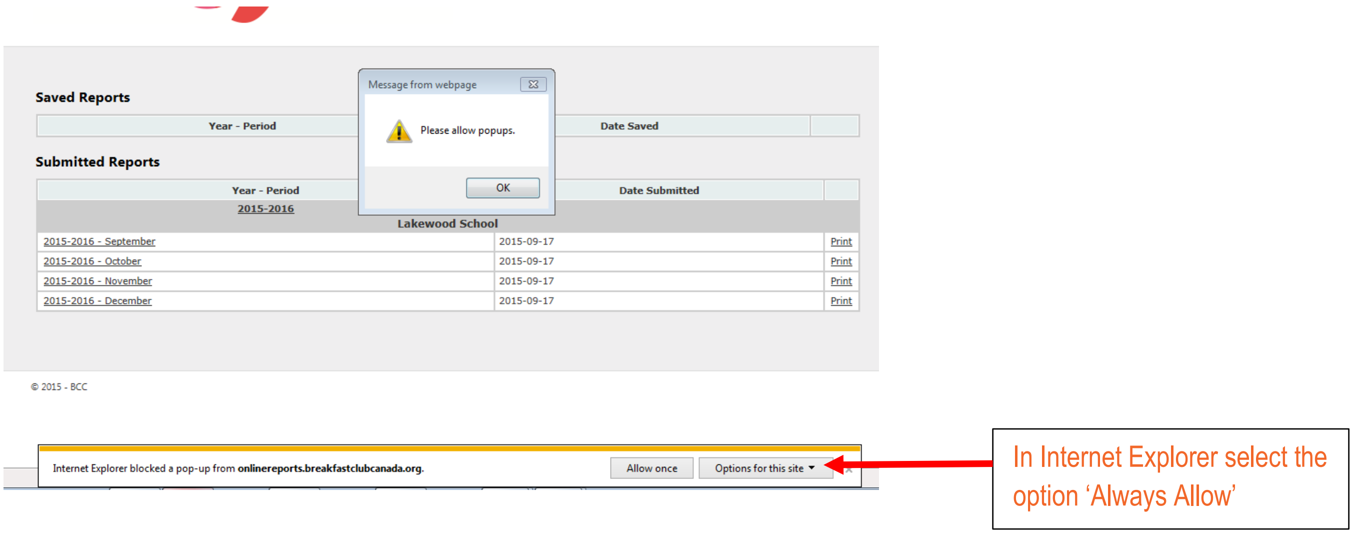
Printing a Report

Click the Print button located at the right of your screen to print a copy of your report.

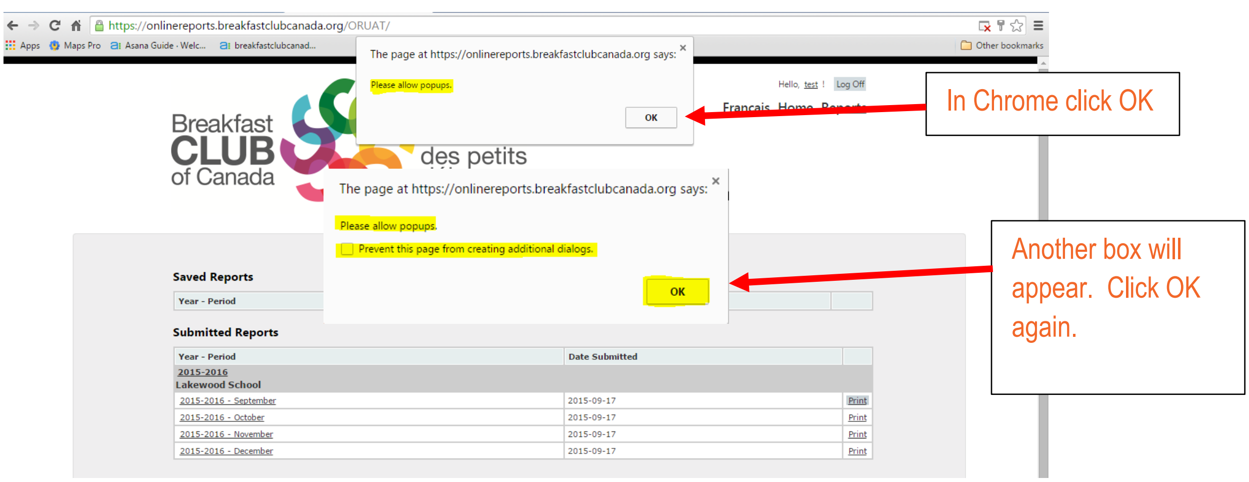


Depending on how your browser is configured, you may get a message asking that pop-ups be allowed. Make sure to enable this functionality in your browser's Internet options. We've included the instructions for Internet Explorer and Chrome below.

Internet Explorer:



Chrome:



Click here and select *Always allow pop-ups from https://online…*
Click Done.

Final step to print the report

[redacted] 2015-2016 / January

Statistics

Number of days breakfast was served during this reporting period	Student Attendance during this reporting period	Total Volunteer Hours during this reporting period	Total Volunteers during this reporting period
15	300	50	0

Revenues

Starting Balance or Cash Carried Forward	Breakfast Club of Canada Grant	Equipment Grant	Fruit & Veggie Grant	Other	School Fundraising	Parental Contribution	Other	Total Revenues
-577.00	.00	.00	.00	.00	.00	.00	.00	**-577.00**

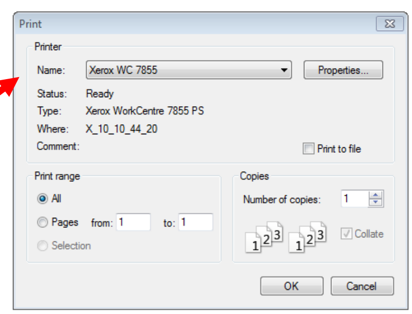
Expenses

Food	Salary/Honorarium	Facilities/Supplies	Equipment	Other	Total Expenses	Net Cash
400.00	.00	.00	.00	.00	**400.00**	**-977.00**

Food Donations

Total Value of Donated Goods
500.00

Select your printer in the dialogue box that appears and click OK.



Other Vouchers Redeemed

For all coupons or vouchers obtained from Breakfast (... edeemed:

Voucher	
Egg Farmers	5

Additional Information Requests (when applicable)

Value spent on locally sourced food	Cobs Bread received during this reporting period
.00	☐

Complete Description of Report Fields

It is important to report on all the fields contained in the report each month (when applicable).

Statistics	
Number of days breakfast was served	Do not include holidays, professional development days or any other day that the school was closed. Indicate in the notes section below if the school was closed for an extended period of time.
Student attendance	Total number of students that attended the breakfast program during this reporting period (total # of students per day X number of days).
Total volunteer hours	Add the total number of hours worked by all non-student volunteers during this reporting period including running errands, purchases etc. Does not include student volunteers.
Total volunteers	Count each non-student volunteer only once during this reporting period
Total student volunteers	Count each student volunteer only once during this reporting period.
Total student volunteer hours	Add the total number of hours worked by all student volunteers during this reporting period.
Revenues	All revenues received during the current reporting period must be entered in this section
Cash carried over	Enter cash on hand when breakfast program began its operations for the current school year (e.g. cash carried over from previous year). Leave blank if there is no amount to report.
Breakfast Club of Canada Funding	Enter amount received from Breakfast Club of Canada *Applicable only to financial support Programs*
Equipment Grant	Enter equipment grant received from the Club (if applicable) *Applicable only to financial support Programs*
Fruit & Veggie Grant	Enter fruit & veggie grant received from the Club (if applicable) *Applicable only to financial support Programs*
Other	Enter any other funding received from the Club (if applicable) *Applicable only to financial support Programs*
School Fundraising	Enter all monies received via fundraising
Parental Contributions	Enter all monies received via parental contributions
Other	Enter total of all other funding received NOT from the Club (various grants, donations, allocations, gift cards/vouchers, etc.) ***CONTRIBUTION NOTIFICATON - Indigenous communities:*** *Write in the amount paid to Club as the community contribution. Inscrivez le montant payé au Club pour acquitter la contribution du milieu.*
Total Revenues	This field cannot be modified, it's automatically calculated.

Expenses All expenses incurred during the current reporting period must be entered in this section.	
Food	Enter total amount spent on food for the breakfast program
Salary/Honorarium	Enter total amount spent on salaries and/or honorariums (if applicable)
Facilities/Supplies	Enter total amount spent on (e.g. cleaning equipment, cleaning solutions, hairnets, gloves, paper towels, plates, bowls, utensils, cups, etc.)
Équipment	Enter total amount spent on large and/or small kitchen equipment and appliances
Other	Enter any other expense incurred for the breakfast program ***CONTRIBUTION NOTIFICATION – Indigenous communities:*** *If you wrote in the community contribution amount in the FUNDS FROM ANOTHER ORGANIZATION section, write the same amount in this field.*
Total Expenses	This field cannot be modified, it's automatically calculated.
Net Cash	This field cannot be modified, it's automatically calculated.

Food Donations	This section is to document the total value of all food donations and equipment and materials donations NOT obtained from the Club
Total value of donated goods	Enter value of all **non-Club** food donations and equipment and materials donations received during the reporting period (excluding homemade goods)
Cobbs bread received during this reporting period	Not applicable in Quebec
Other Vouchers Redeemed	
Identify the coupon	Select the supplier (Grocery Foundation, Danone, Kellogg's, etc.)
Quantity Redeemed	Total coupons redeemed during the reporting period.
Additional information (if applicable	
Value Spent on Locally sourced food	Not applicable in Quebec
Notes from Site Coordinator	Enter any additional information in this space (who, what or where any food donations came from, the sources of all other revenues, great stories, and challenges faced, describe donations received equipment/materials etc...)
Upload receipts and documents	**See the document Quick Guide - Upload receipts and documents**

Quick Guide – Upload receipts and documents

- Keep your original DEPOSIT RECEIPTS and send them to your regional coordinator at the end of the school year.

Note: When uploading documents with your report, please make sure to rename them appropriately

Documents to upload	***Upload with your report***	***Notes***
1- Milk invoices	**Monthly** File name (Milk1, Milk, etc...)	
2- Purchase receipts	**Monthly** File name (Purchase1, Purchase2 ect...)	→ for all purchase for the breakfast program during the month
3- Egg coupon redemption receipt (if applicable)	**Monthly** File name (Egg1, Egg2, etc...)	**→ If applicable**
Optional document (confirm with your club's representative)		
Attendance stats	Monthly	

Cutoff dates per trimester:

First trimester: opening to November 30

Second trimester: December 1rst – February 28th

Third trimester: March 1rst to closing in June

Frequently Asked Questions

1) If I submit my report and then realize that I left something out or made an error, can I go back and change it?

If you have only pushed the "Save and Return Later" button, then it is still a working document and you can go in and make any changes you like. If you have successfully pushed "Submit", don't worry. Just email or call your coordinator and let her/him know which month you need to "unsubmit" and they will be happy to do that for you. Once that has been done, your coordinator will let you know and you can go in make all necessary changes. Don't forget to "refresh" your screen if needed.

2) When entering attendance data, do I count each student once for each month?

No!! You must enter each student's attendance *every time* they attend the program throughout the month. So, if 20 students come in for 20 days of the month, your total monthly attendance will be 400.

3) My school receives funding from a few different sources. Do I have to enter all of the Breakfast Program funding in my report of just our Breakfast Club of Canada funding?

At Breakfast Club of Canada, we love to see schools pro-actively attaining funding from as many sources as possible, after all, we want your program to be the best that it can be! So yes, you NEED to enter all of the Breakfast Program funding (revenues) you receive from all sources as well as enter all of the program expenses. Because Breakfast Club and several other funders allocate grant amounts in chunks throughout the year, we expect that you will have a cash surplus in your account on several reports. To us, that is a good thing, not a red flag. We have a brand new text box that allows you to specify where your other sources of revenue are coming from.

4) At the end of the year, what will happen if I have a cash surplus?

Most likely this will not happen; however, sometimes it does. It is a good idea, if you can do it, to leave a small amount of cash in the bank for the following September's program. It often takes time, once school has begun, for the allocations to get to the schools, so having a small safety-net is wise. Once you have gained approval from your Breakfast Club of Canada coordinator, you can also spend up to 20% of your grant allocation on equipment or non-food supply needs.

5) What is the "Notes" section? Do I have to use it?

The "notes" section is a useful communication tool between you and your coordinator. While you can always phone your coordinator, you can also use the "notes" section to explain things to your coordinator like:

- the sources of all other revenues
- what "equipment or supplies" you bought with the funding
- who, what or where any donations came from (food or other)
- any great story you would like to share about your program (we love those!)

- any and all barriers you are faced with in your program (we are here to help you overcome any difficulties you face throughout the year- we see opening up and recognizing issues as a strength to your program, not a weakness)

6) I am a new school breakfast program and my breakfast program started later in the school year. Do I need to start my reports in September?

The short answer is 'Yes'. Our system has its limitations and in order for it to function properly, you will need to submit a report for all the months prior to officially starting your breakfast program. But this won't take any time at all, simply leave all the data at 0, and click Submit.

However, if you are starting your breakfast program and already have funds, you must enter this starting cash balance in the September report in the Cash Carried Over field. September is the only month that this field is available to input data.

Troubleshooting

If you experience technical difficulties, make sure to consult this section before contacting your Club representative. Know that certain issues may be caused by outdated or incompatible operating systems or browsers. The online reports platform has demonstrated optimal performance on the latest versions of Internet Explorer, Chrome, Mozilla Firefox, and Safari.

If you have a technical problem not addressed in this list, please contact your regional coordinator. Make sure you note what time and date you encountered your issue, what you had done up to that point as well as which browser you were currently using. It can also be helpful if you can print screen your error message.

Problem	Solutions to Try
I finished entering my data but I do not see the Save or Submit buttons.	This is likely because you are attempting to complete a report out of chronological order. For example, instead of completing October, you've skipped ahead to November. This will not work. You must CANCEL, go back and complete October first. It might be necessary to contact your Club representative if the problem persists.
When I click Save or Submit, I get an error message saying that I have previously unsubmitted reports.	1) This happens when a user attempts to submit a report out of chronological order. Go back and submit all previously saved reports in chronological order. 2) If you notice the absence of a saved or submitted date on the home page, this might indicate a system glitch which is preventing you from completing future reports. You must report this problem to your Club representative and he/she will help resolve this issue.

There is no scroll bar in the report so I cannot go down to complete the bottom part. (This seems to be an issue when using a laptop)	Click the down arrow key of your keyboard several times and this should make the scrolling bar appear. Or if your mouse has a scrolling wheel, this should activate the scrolling action when turning the wheel towards yourself.
I tried to enter data in the *Cash Carried Forward* field and the system brought me back to the home screen.	Entering data in this field is only possible in September. For all subsequent months, this field cannot be edited so attempting to do so may cause the system to kick you out of the report. If this happens, just reopen the report to restart entering data.
After logging in I click on Reports and I get the following error message:  	This happens when your Club representative has not set the reporting frequency for your school (monthly, quarterly, etc.). Please contact your Club representative to inform him/her of the situation.