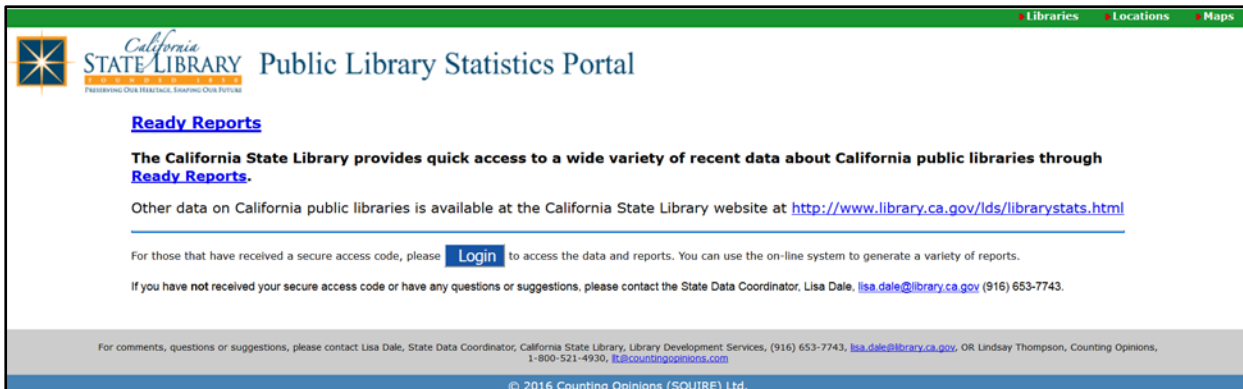


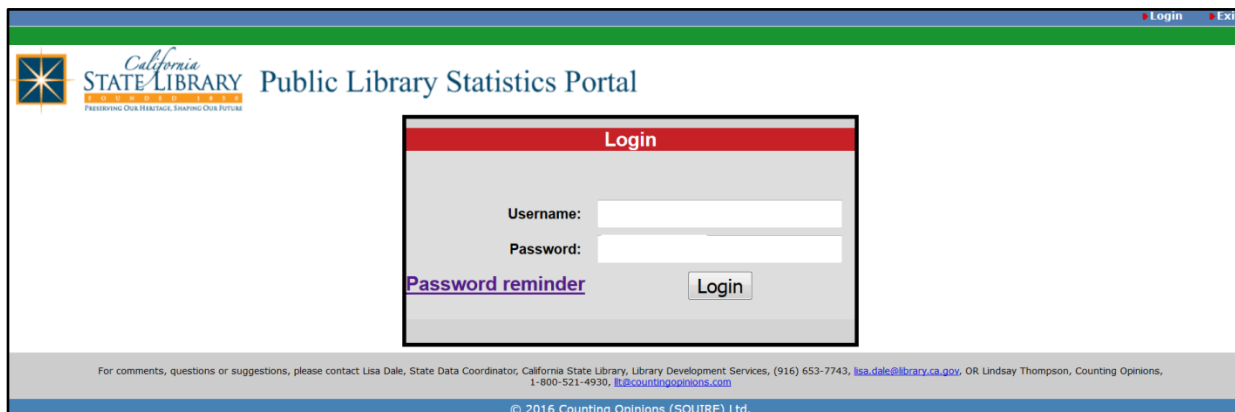
## Library Service and Technology Act (LSTA) Mid-Project Program Narrative Report Instructions

### How to Access the Online Report Form

1. Go to <http://ca.countingopinions.com> and click the Login button.



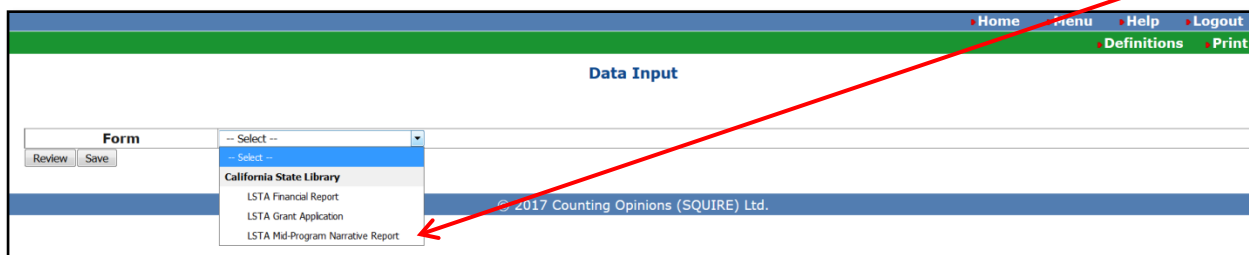
2. Enter the username and password that was sent to you via email.



3. Click Enter.

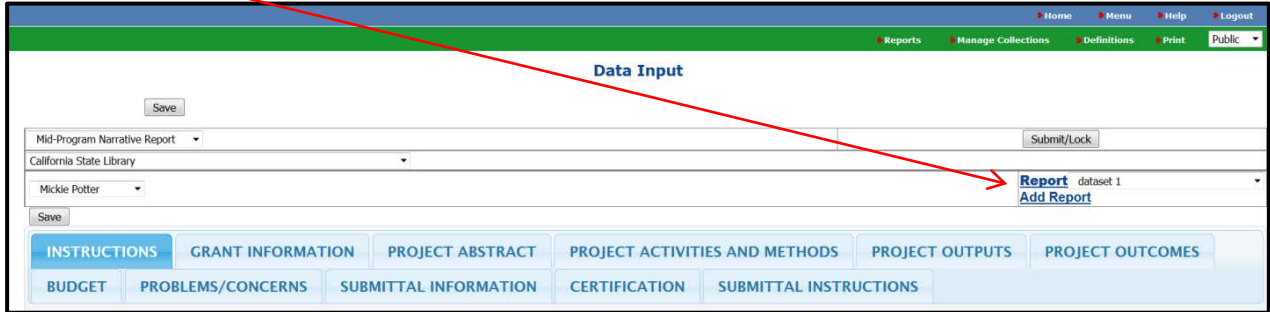


4. If prompted, choose LSTA Mid-Project Program Narrative Report from the dropdown menu.



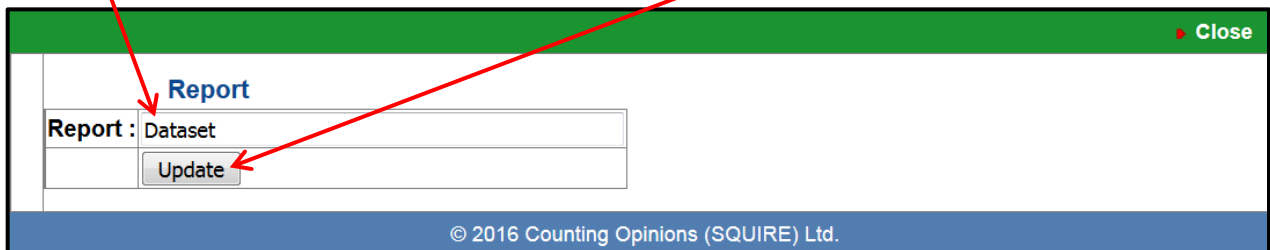
## Name the Report Form

1. Click Report.



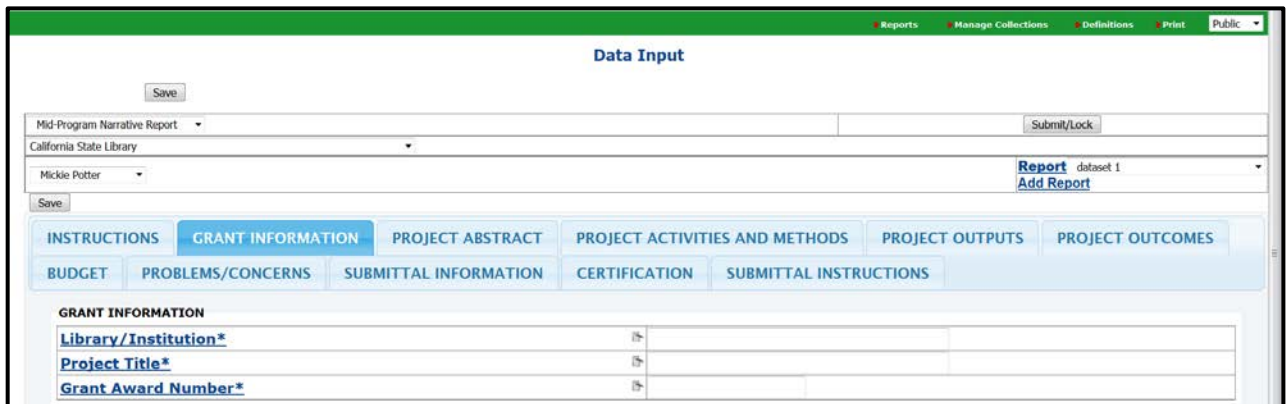
The screenshot shows the 'Data Input' form with a green header bar containing navigation links: Home, Menu, Help, Logout. Below the header are links for Reports, Manage Collections, Definitions, Print, and Public. The form contains several dropdown menus: 'Mid-Program Narrative Report', 'California State Library', and 'Mickie Potter'. A 'Save' button is located above the first dropdown. To the right of the 'Mickie Potter' dropdown is a 'Submit/Lock' button. A red arrow points from the instruction '1. Click Report.' to a 'Report' button next to a dropdown menu showing 'dataset 1'. Below the 'Report' button is an 'Add Report' link. At the bottom of the form is a row of tabs: INSTRUCTIONS, GRANT INFORMATION, PROJECT ABSTRACT, PROJECT ACTIVITIES AND METHODS, PROJECT OUTPUTS, and PROJECT OUTCOMES. Below these tabs are more tabs: BUDGET, PROBLEMS/CONCERNS, SUBMITTAL INFORMATION, CERTIFICATION, and SUBMITTAL INSTRUCTIONS.

2. Double click in the box. Enter the project title. Click Update.



The screenshot shows a 'Report' dialog box with a green header bar and a 'Close' button. The dialog contains a text input field labeled 'Report : Dataset'. A red arrow points from the instruction '2. Double click in the box. Enter the project title. Click Update.' to the 'Report : Dataset' field. Another red arrow points to an 'Update' button located below the text field. At the bottom of the dialog is a copyright notice: © 2016 Counting Opinions (SQUIRE) Ltd.

3. You are now ready to start the report.



The screenshot shows the 'Data Input' form with the 'GRANT INFORMATION' tab selected. The form contains the same dropdown menus and buttons as in the previous screenshot. Below the tabs, the 'GRANT INFORMATION' section is expanded, showing three fields: 'Library/Institution\*', 'Project Title\*', and 'Grant Award Number\*'. Each field has a small icon to its right. The asterisk (\*) indicates that these fields are required.

## Completing the Report Form

All materials and instructions necessary to complete the Mid-Project Program Narrative Report are available on the California State Library website at <http://www.library.ca.gov/grants/lsta/manage.html>. You should have a copy of your grant award letter available.

1. The report is broken into sections:

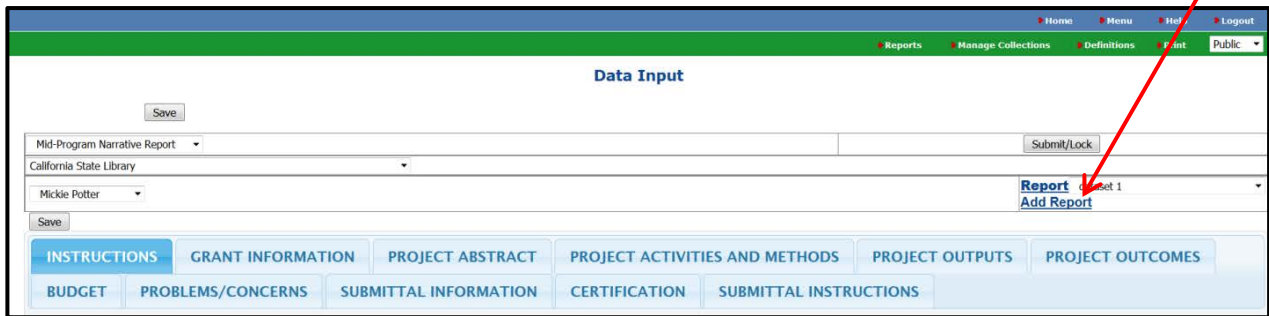
- Grant Information
- Project Abstract
- Project Activities and Methods
- Project Outputs
- Project Outcomes
- Budget
- Problems/Concerns
- Submittal Information
- Certification
- Submittal Instructions

2. Questions that **REQUIRE** an answer are marked with an asterisk (\*).

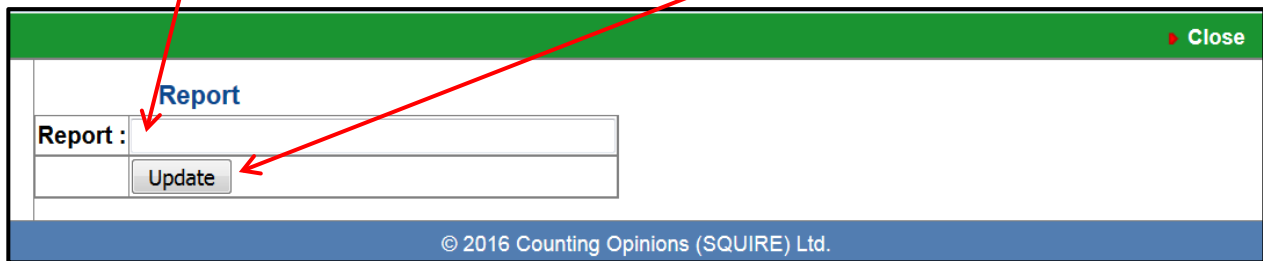
- At the top and bottom of the screen you will see a Save option, which can be used to save your progress, although data is saved as you exit each field. Please note: You will be able to save partially completed work and return to the report at a later time.
- Some questions require a Yes/No answer. Depending on your answer, you may be directed to additional questions.

### How to Start a New Report Form

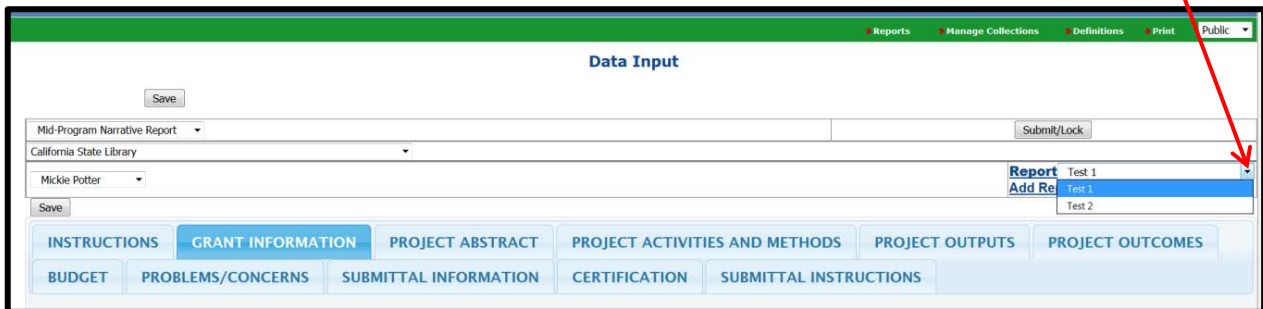
- If you have more than one grant to report on you can start a new report by clicking on Add Report.



- Click in the box. Enter the new project title. Click Update. You are now ready to start a new report.



- When returning to either edit or submit a report, make sure to select the appropriate report.



### Submitting the Report Form

- After you have completed your report, click the SUBMIT/LOCK button.
- After the report has been submitted online an email will be sent to the grant monitor with a link to the report. The grant monitor will review the report. When the grant monitor approves the report the submitter, grant monitor, and the State Library will receive an email with a link to the report. A PDF copy of the report will **not** be attached to the email.
- When the email is received follow the link provided to print a PDF copy of the report.

- Click Print and Save PDF

Print and Save PDF

Mid-Program Narrative Report  
California State Library

GRANT INFORMATION

Library/Institution*	Test 1
Project Title*	
Grant Award Number*	

- Click the printer icon in the top right corner of the screen.

GRANT INFORMATION

Library/Institution*	
Project Title*	
Grant Award Number*	

- You can also print the report by clicking on the print button in the top right corner of the screen while signed into the report.

Data Input

Mid-Program Narrative Report  
California State Library  
Mickie Potter

INSTRUCTIONS GRANT INFORMATION PROJECT ABSTRACT PROJECT ACTIVITIES AND METHODS PROJECT OUTPUTS PROJECT OUTCOMES  
BUDGET PROBLEMS/CONCERNS SUBMITTAL INFORMATION CERTIFICATION SUBMITTAL INSTRUCTIONS

- Have the library director sign it (in the box to the right of the certification statement on the form) in **blue** ink and send the **original and ONE copy** as noted below within 7 days of receiving this email.

**By Mail:**

California State Library  
P.O. Box 942837  
Sacramento, CA 94237-0001  
Attention: Fiscal Office - LSTA

**By Non USPS Delivery:**

California State Library  
900 N Street  
Sacramento, CA 95814-4813  
Attention: Fiscal Office - LSTA

**Further Assistance**

If you need assistance completing any of the information requested on the form, please contact your grant monitor. If you are not sure who your grant monitor is, you may contact either Mickie Potter or Angie Shannon. Contact information is below.

Mickie Potter  
(916) 653-4730  
[mickie.potter@library.ca.gov](mailto:mickie.potter@library.ca.gov)

Angie Shannon  
(916) 653-6699  
[angie.shannon@library.ca.gov](mailto:angie.shannon@library.ca.gov)