

Getting Started, Navigating the Application

WHAT ARE THE ATS ANNUAL REPORT FORMS (ARF)?

Each year The Association of Theological Schools (ATS) collects information about its member institutions. The ATS Annual Report Forms (ARF) provide a valuable resource for assessing the current state of theological education and are essential to the production of a variety of informational resources including the Institutional Peer Profile Report (IPPR), the Strategic Information Report (SIR), and the Annual Data Tables (ADT).

These forms collect various data regarding admissions, completions, enrollment, development, finance, personnel, salary, etc. Because forms from all schools are necessary before ATS can begin using the data, timely completion of the forms is imperative; a delay in providing your school's data impacts all ATS member schools. Completing these forms is a condition of membership.

ACCESSING THE APPLICATION

Website: To access the Annual Report Forms (ARF) login screen type into a web browser address bar, ARF.ATS.EDU (without "www" or "http://"). **Access to the ARF is limited** to the ATS member's ARF keyholder and the user accounts created by the keyholder.

ARF Keyholder: Keyholders are setup by the Chief Executive Officer (CEO) of each member institution. The keyholder can be the CEO or a trusted colleague delegated by the CEO. This person is responsible for coordinating the data entry and submission of the ARF survey to ATS. The ARF keyholder can create user accounts with limited or full access roles for additional personnel enter and review data. See the keyholder and user account instructions for details.

When delegating the keyholder, be aware this role has full access to the ARF, including confidential financial and salary data.

Multi-Factor Authentication (MFA): MFA security codes are required to setup/activate the keyholder account and to login to the application. The MFA code will be sent via email, with an option in the Profile Settings to have future codes sent to a mobile phone via SMS text message.

- ☰ The menu icon in the top right of the application toggles the left navigation menu, under the ATS logo, between hidden and visible.
- ▶ The arrows to the left of the menu option, ARF, expand (right facing) and collapse (down facing) the ARF menu options. The options available will depend on the level of access for the user account logged into the application.
 - Data Entry:** for accessing and submitting the ATS Annual Report Forms
 - User Accounts:** for the keyholder to manage the ATS member institution's user accounts
 - Profile Settings:** for users to manage their account profile, i.e., change MFA delivery and/or password.

NAVIGATING THE DATA ENTRY MENU SCREEN

- ❓ **Instructions:** Click to access a list of the form instructions available to the current user account and, to the right of the forms list, a link for "All forms in one document". Click the printer icon next to a listed form to open the instructions for that form in a new web browser tab or click "All forms in one document" to download a complete set* of instructions as a PDF file.
- ☰ **Form Review:** Click to open the Form Review report* in a new window. From the report viewer you can navigate and zoom the report pages, and export the report as PDF, Word, and Excel files. This report provides a summarized comparison of the data reported in the current and previous survey years, including the number and percent of change, as well as user comments and data validation messages. Data validation messages are system generated messages to assist reviewing the data for missing information, possible errors, and anomalies. There are four types of data validation messages; Informational, Review, Error and Submit Error.
 - Informational** messages provide additional information regarding the relevant data.
 - Review** messages identify unexpected values and large changes in the data compared to the previous survey year. After review of these items, if no corrections are needed a comment should be provided in the relevant form explaining the reason for the anomaly.
 - Error** messages identify items requiring correction or completion and are shown in red text. These types of errors will not prevent submission of the ARF, however ATS will contact the form respondent for correction and/or additional information.
 - Submit error** messages identify items that must be corrected before submitting the ARF and are shown in bold red text.
- 🖨️ **Printer Friendly Forms:** Click to access a list of printer friendly forms available to the current user account and to the right of the forms list, a link for "All forms in one document". Select a Survey Year and print option, then click "All forms in one document" to download a complete set* of forms as a PDF file or click the printer icon next to a listed form to open the printer friendly form in a new window. From the report viewer you can navigate and zoom the form pages, and export the form as PDF, Word, and Excel files.
 - Survey Year: use to view forms for the current or previous survey year
 - Print Options: select "Print Forms" to view the forms filled with the data entered in for the selected survey year
select "Blank Forms" to blank forms formatted for your institution.

Links to printer friendly blank form (not formatted for your institution) and instructions are available on the ATS website at www.ats.edu, Resources, Annual Report Forms. Printer friendly forms (formatted for your institution) and instructions can be viewed and printed from within the online application. See below for details.

*Note: Form Review and All forms in one document for both Print Forms and Instructions, will only include the forms available with the current login.

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School: This is a read only field indicating the name of the ATS member school for which the data is to be reported. The ATS member school may be part of an institutional complex, report data for the ATS member school only.

Survey year: Select the most recent year to enter or review data for the current collection period. Select the earliest year to view the data from the previous data collection period. The current survey year data can be edited until the data is submitted, at which point the data is read only. The previous survey year data is always read only.

Please note Survey year represents the academic year of the ARF processing period. The period of the data reported will vary for the different forms and is displayed in the form list next to the form name, just below the name of the form within the forms and within the instructions.

ARF Due: ARF data should be submitted no later than the ARF due date displayed.

 **Request Extension:** Click to request extension of the ARF Due date. Include the reason for the extension request and a proposed submission date. If an extension is granted the ARF due date will reflect the new due date. Data submission should not be delayed due to the audit having not been completed. In that case, use unaudited data for the financial forms, noting them as unaudited in the form "Comments".

 **Submit Data:** Click to access the submit data screen. Review the list of issues, which includes the Submit Error, Error and Review messages shown on the Form Review report. See above Form Review section for details. To make corrections or provide explanation, click Cancel at the bottom of the screen and return to the ARF form to make corrections or enter comments. When complete return to this screen and scroll to the bottom; select or add a respondent, then click Submit Data to lock and submit the ARF to ATS. ATS will review the data and contact the keyholder if additional information is required. Only the keyholder can submit the ARF, this icon will be disable for other users.

 **ARF Form Selection:** Click the Form Selection icon to open the form data entry screen. Some forms may be disabled depending on the access role assigned to the user account used to access the application.

Forms may be completed in any order with the following exceptions.

- Complete EF-1 Enrollment (Race and Gender) before EF-2 Enrollment (Age and Gender)* and EF-3 Enrollment (Denomination). **EF-2 Enrollment (Age and Gender) is required biennially only and is disabled in even numbered years.*
- Complete CF-1 Completions (Race and Gender) before CF-2 Completions (Time and Gender) and CF-3 Completions (Placement and Gender).
- Complete FF-1 Financial Data before FF-2 Finance Data (additional).
- Complete PF-1 Personnel – Full-Time before SF-1 Salary

NAVIGATING THE ARF FORM HEADER

School: is a read only field to indicate for which ATS Member you are reporting data.

Respondent: Respondents entered on Respondents form (RF-1) will be shown in this field. If there is no respondent shown or the respondent shown is incorrect, select or add a respondent. Changes made to the respondent will be reflected in form RF-1.

- ✓ Select from existing respondents, this list is populated from form RF-1 or other form's respondent field.
 - +
- Enter a new respondent's last name, first name, title, telephone number*, and email; then click Save Respondent. This respondent will be added to form RF-1 with the current form selected.

*Enter North American phone numbers as 10 digits in the format of 3-3-4 separated by dashes. For non-North American phone numbers, enter the number as appropriate for dialing from North America. Enter extension at the end of the phone number preceded with Ext.

Survey Year: Select the most recent year to enter or review data for the current collection period. Select the earliest year to view the data from the previous data collection period. Form EF-3 Enrollment (Age and Gender) is collected biennially, therefore the previous data collection period will be two years past, while other forms will be one year past.

Print Options select "Print Forms" to view forms filled with the data entered in for the selected survey year, or "Blank Forms" for blank forms formatted for your institution.

 **Printer Friendly Forms:** Click to open the printer friendly form in a new window. From the report viewer you can navigate and zoom the form pages, and export the form as PDF, Word, and Excel files.

 **Comments:** Each form includes a field for entering comments to further explain the data entered, this field is located in the header of the form. Some forms will require explanations be entered in the comments to continue. Forms, PF-1, SF-1 and RF-1 each include a table summarizing each data record, for these forms there is an icon to indicate if comments are available for the record listed. A solid blank icon indicates no comments, and a lined icon indicates comments are available.

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NAVIGATING THE ARF FORM

 **Instructions:** Click to access instructions for the form

 **Form Review:** Click to open the Form Review report in a new window. From the report viewer you can navigate and zoom the report pages, and export the report as PDF, Word, and Excel files. This report provides a summarized comparison of the data reported in the current and previous survey years, including the number and percent of change, as well as user comments and data validation messages. Data validation messages are system generated messages to assist reviewing the data for missing information, possible errors, and anomalies. There are four types of data validation messages; Informational, Review, Error and Submit Error.

Informational messages provide additional information regarding the relevant data.

Review messages identify unexpected values and large changes in the data compared to the previous survey year. After review of these items, if no corrections are needed a comment should be provided in the relevant form explaining the reason for the anomaly.

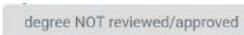
Error messages identify items requiring correction or completion and are shown in red text. These types of errors will not prevent submission of the ARF, however ATS will contact the form respondent for correction and/or additional information.

Submit error messages identify items that must be corrected before submitting the ARF and are shown in bold red text.

 **Save:** Click to save the information entered and run form validation. If validation fails an error message is displayed, and if the form allows saving the data with errors a **Close Now** option will appear in the validation error message. If the Close Now option is not available all errors must be resolved to close the form with the data saved. If the errors cannot be resolved at the time of attempting to close, click Close/Cancel to exit the form, no data will be saved.

The Close Now option is provided as a convenience to prevent the need to re-enter large amounts of data if the errors cannot be corrected immediately. If the errors are not corrected before submission ATS will contact the keyholder for the corrected information to complete the ARF process.

 **Close/Cancel:** Click to close the form and return to the previous screen. If the information is not yet saved this action will cancel.

 **Shaded fields:** The Admissions, Completions, and Enrollment forms may have gray shaded fields to indicate degree program areas that are either not reviewed for approval or are not approved for the member school. Data entry is possible within these fields, and if entering data in a shaded field, an explanation should be entered in the comments field of the relevant form. Some forms require explanations, and the form cannot be saved without entering comments.

 **Patterned fields:** Patterned fields represent fields for which data entry is not allowed. These fields are either auto calculated fields (blue slashed) or contain amounts that are brought forward from another part of the form or in some cases another form (wide gray slashes).

Forms CF-1 Completions (Race and Gender), CF-2 Completions (Time and Gender), and CF-3 Completions (Placement and Gender) are collecting data for the same set of students, therefore the totals on these forms are expected to match. Forms CF-2, and CF-3 will include patterned fields with the data from CF-1. Similarly, EF-1 Enrollment (Race and Gender), EF-2 Enrollment (Age and Gender) and EF-3 (Denomination) are for the same set of students and will include patterned fields with the data from EF-1.