



APPLICATION COURSE

Introduction to SACS

SACS Application Course

Introduction

Lesson 01 – Application Security

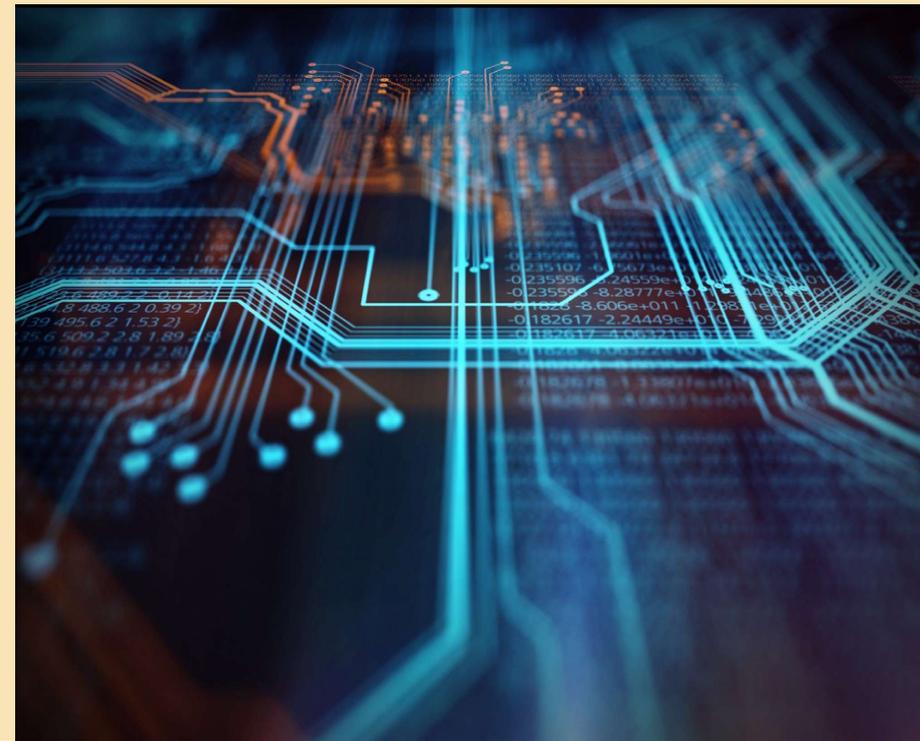
Lesson 02 – Data Import

Lesson 03 – Dashboard

Lesson 04 – Forms

Lesson 05 – Technical Review Checks (TRC)

Lesson 06 – Data Submissions



LESSON 06 – Data Submissions

Data Submission Performance Objectives

- a) User must be able to Identify Submission States
- b) User must be able to Promote a Submission
- c) User must be able to Publish a Dataset
- d) User must be able to Promote a Submission to COE/CDE



LESSON 06 – Data Submissions

Introduction to Data Submission

- The data submission and review workflow module provides SACS Web users with an end-to-end financial data submission process
 - Includes all phases of the submission process from LEA data submission through CDE review activities with the ability to track and monitor the data.
 - As datasets move through the workflow, some transitions and state changes are system automated, and some are approval-based.



LESSON 06 – Data Submissions

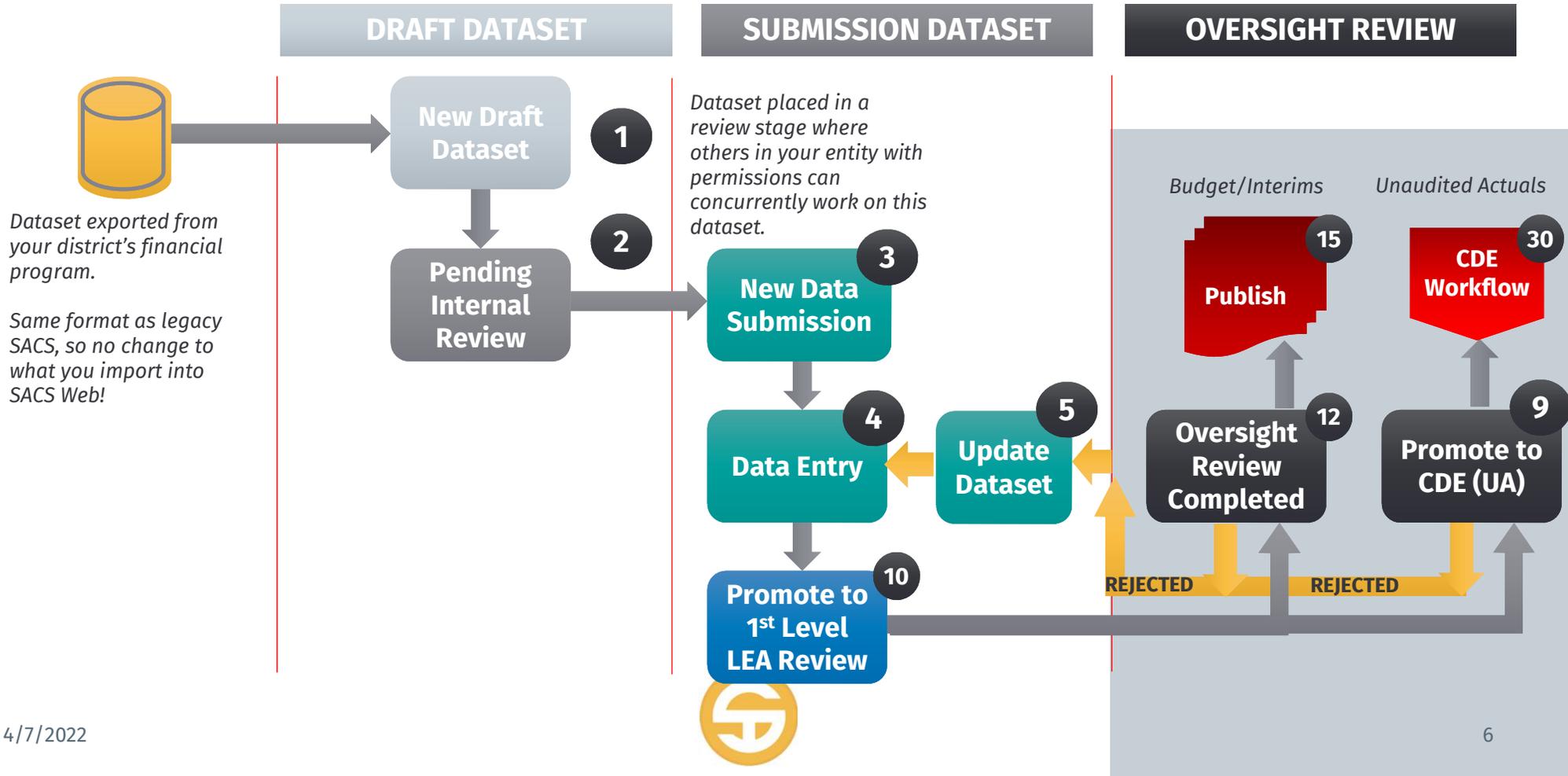
Introduction to Data Submission

- The workflow is role-based and authorized users can
 - View and manage relevant workflow items
 - Multiple users can work with the same data file at the same time
 - Users and reviewers can provide comments and request corrections to a data submission as part of the workflow process

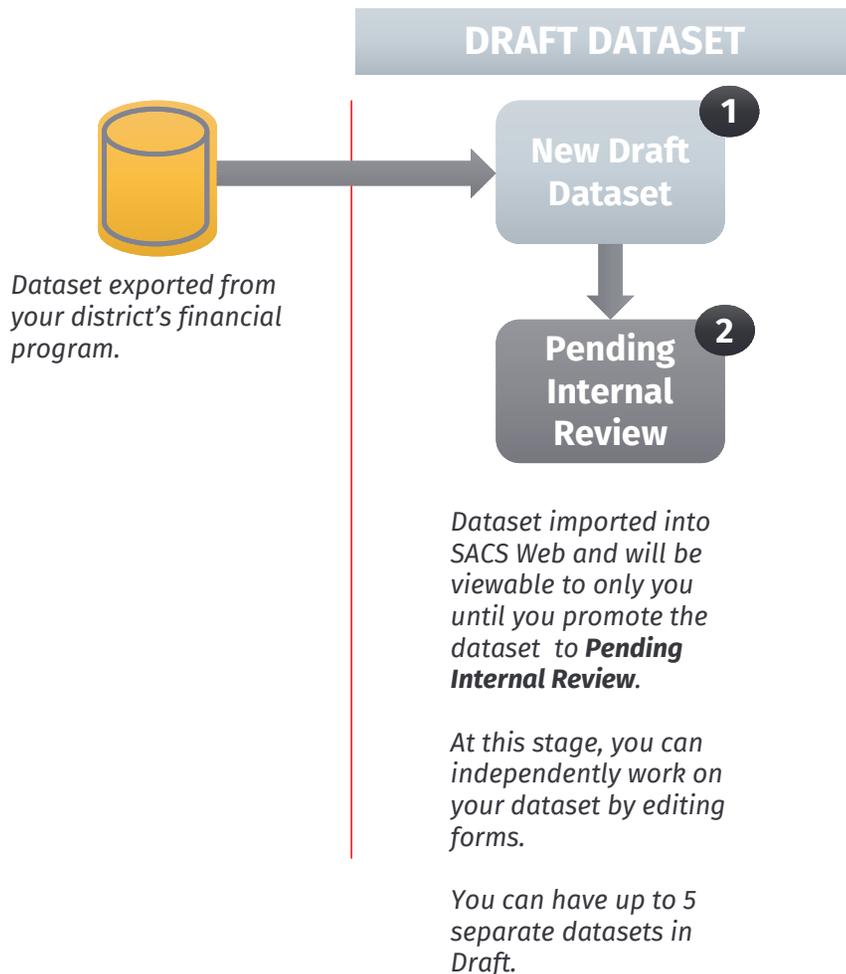


LESSON 06 – Data Submissions

Workflow for LEA Users



LESSON 06 – Data Submissions



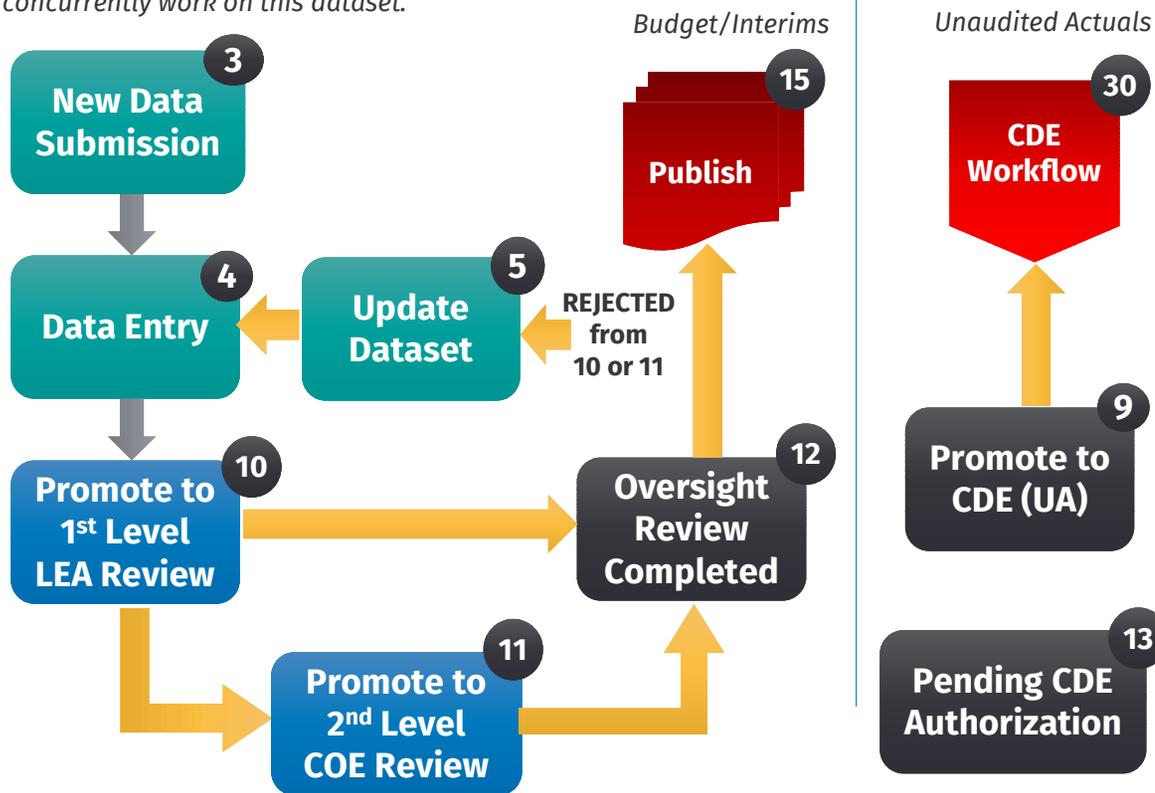
Workflow for LEA Users

- Draft datasets are defined as datasets in the following states:
 - **(1) Draft**
 - **(2) Pending Internal Review**
- Draft Datasets are visible on the Draft Dataset List only for the user who created the dataset.
- Datasets in the **Pending Internal Review** state are visible to LEA users with the role of Edit Dataset or Dataset Approval on the Draft Dataset Approval queue.
- LEA users may have a maximum of **5 draft datasets** for selected fiscal year and specific entity.

LESSON 06 – Data Submissions

SUBMISSION DATASET

Dataset placed in a review stage where others in your entity with permissions can concurrently work on this dataset.



Workflow for LEA Users

- Submission datasets are datasets that are exclusive to the entity and cannot be deleted unless the state is returned to Draft.
- Submission datasets are datasets in the following states:
 - (3) New Dataset Submission
 - (4) Data Entry
 - (5) Update Dataset
 - (9) Promote to CDE Review
 - (10) Promote to 1st Level LEA Review
 - (11) Promote to 2nd Level COE Review
 - (12) LEA Oversight Review Completed
 - (13) Pending CDE Authorization
 - (15) LEA Publish
 - (30) CDE Workflow (New CDE Submission)

LESSON 06 – Data Submissions

UNAUDITED ACTUALS RESUBMISSION DATASET

Resubmission

33

SACS automatically sets the resubmitted dataset to the **Resubmission** status and CDE is alerted by email.

Resubmission Required

57

If CDE rejects a submission, CDE will return the submission to the LEA and set the status to **Resubmission Required**.

Submission Replaced

60

The status for original dataset is changed to **Submission Replaced** and email is triggered to the LEA.

Resubmission Rejected

61

If the submission is rejected the state for resubmitted dataset is changed to **Resubmission Rejected** and the original dataset will continue through the review process.

Workflow for LEA Users

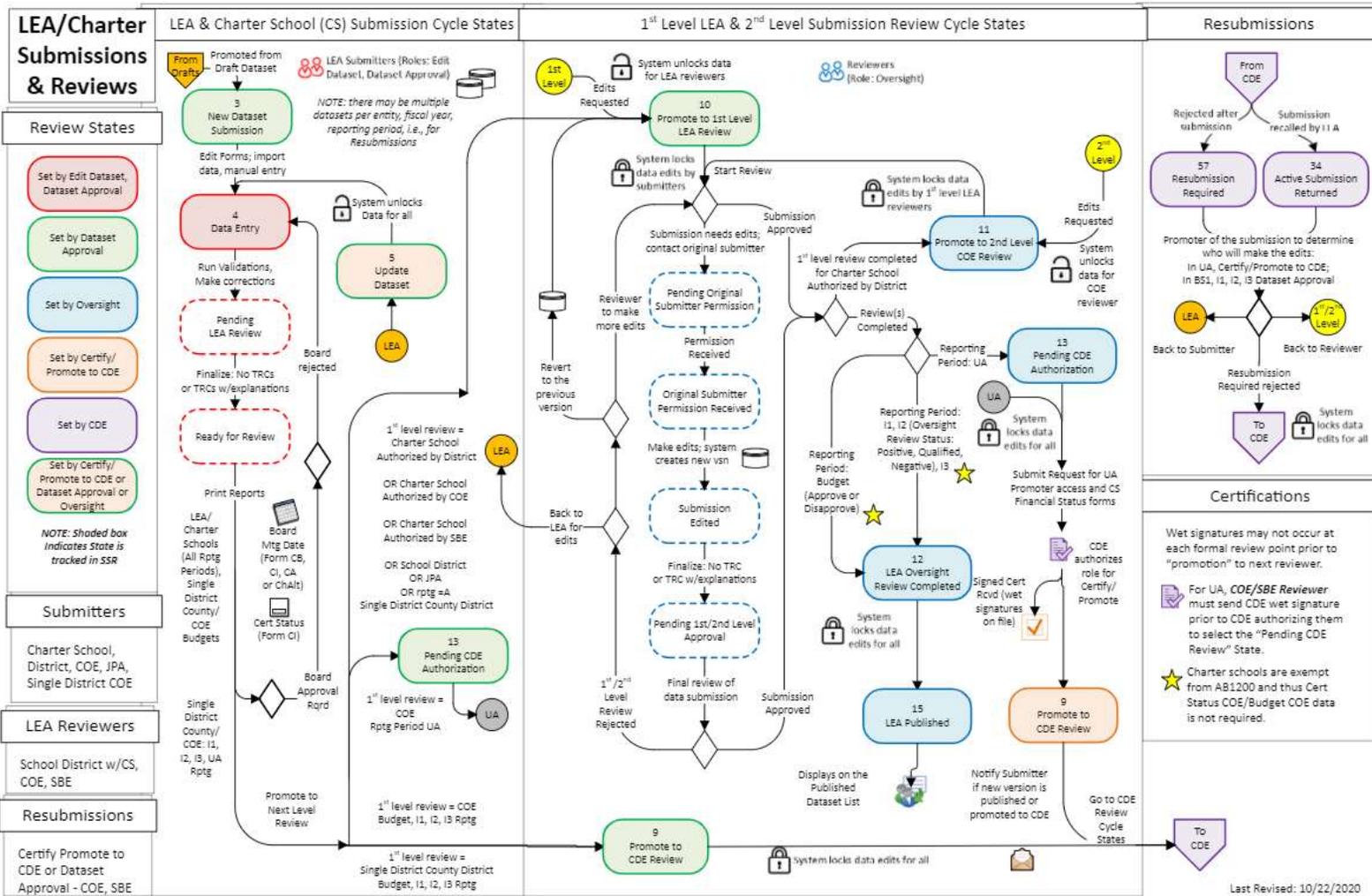
Unaudited Actuals reports need to be sent to CDE for review. Sometimes, reports need to be resubmitted to CDE even after they have gone through 1st and 2nd level reviews. The system recognizes when a dataset is a resubmission since there was a previous formal submission for the entity.

Resubmission datasets are defined with the following states:

- Resubmission (33)
- Resubmission Required (57)
- Submission Replaced (60)
- Resubmission Rejected (61)

LESSON 06 – Data Submissions

SACS Web Workflow for Users



LESSON 06 – Data Submissions

Prepare your new draft dataset for Pending Internal Review

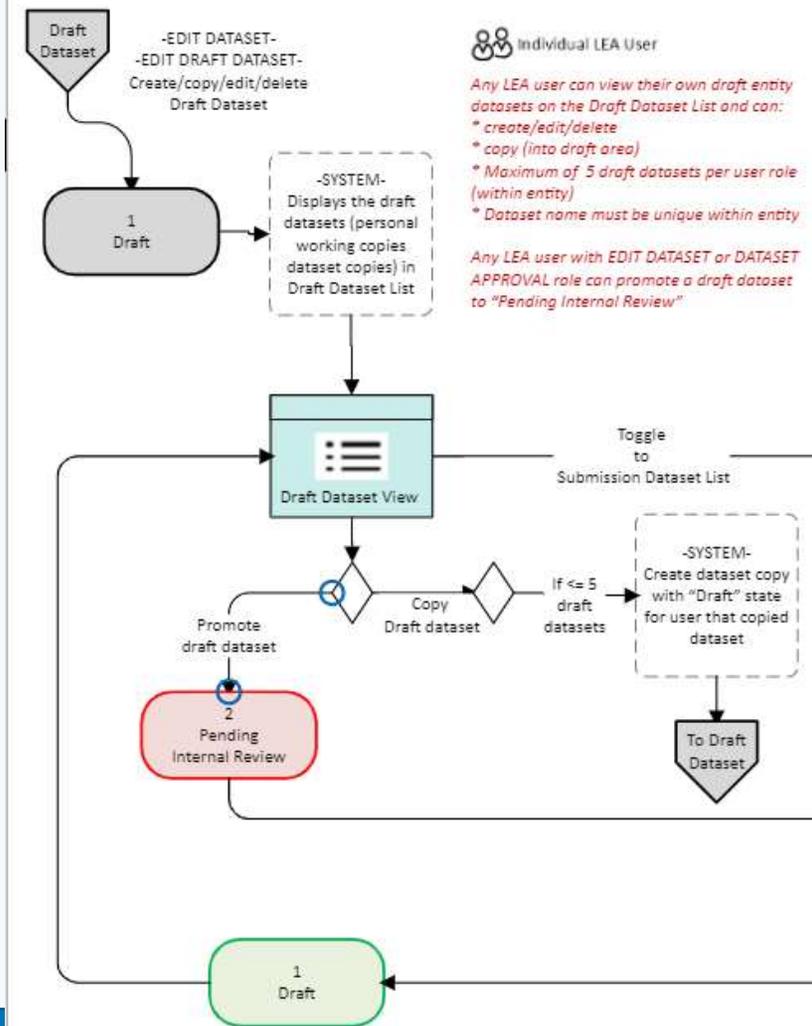
➤ Prepare your new draft dataset for **Pending Internal Review**

1. Import a dataset from your financial system into SACS
2. Lock the Submission
3. Open, complete, and save applicable forms
4. Run TRC to validate data
5. Review and edit your data to ensure info is correct
6. Go to dashboard and change state from **DRAFT** to **PENDING INTERNAL REVIEW**
7. Click **Save**



4/7/2022

Draft Dataset – Personal Working Copy (within entity)



LESSON 06 – Data Submissions

Role needed to promote: **EDIT DATASET OR DATASET APPROVAL**
Queue needed to view: **LEA DRAFT DATASET APPROVAL**

Change status to **PENDING INTERNAL REVIEW** from DRAFT

The screenshot shows the SACS (Standardized Account Code Structure System) interface. The top navigation bar includes the SACS logo, a dashboard icon, and menu items for Import, Users, Queues, and Tools. The user is logged in as EmanuelPublic, and the fiscal year is set to 2020-21. The main section is titled 'Submissions' and features a 'New Draft' button. Below this, there are tabs for 'All', 'Draft', and 'Official', with 'Draft' selected. A table displays submission data with columns for CDS Number, LEA Name, Dataset Name, Number, Dataset Type, Last Modified, Last Modified By, Fiscal Year, Reporting Period, CDE Received, State, State Last Updated, Assigned To, Last Assigned, Submission Notes, and Actions. The first row shows a submission with CDS Number 57-10579-0000000, LEA Name Yolo County Office of Education, Dataset Name NorthUSD-UA, and State set to Draft. A dropdown menu is open for the 'State' column, showing the option '→ Pending Internal Review' and a 'Save' button. A tooltip also indicates that notes can be added to the submission.

CDS Number	LEA Name	Dataset Name	Number	Dataset Type	Last Modified	Last Modified By	Fiscal Year	Reporting Period	CDE Received	State	State Last Updated	Assigned To	Last Assigned	Submission Notes	Actions
57-10579-0000000	Yolo County Office of Education	NorthUSD-UA	B8BKKY1ET7	SACS	01-31-22 15:54	Not Assigned	2020-21	Budget, July 1	(none)	Draft	01-25-22 14:54	Not Assigned	01-25-22 14:54	You Can Add Notes To The Submission So A User Within...	[Save] [Close]



LESSON 06 – Data Submissions

Promote to New Dataset Submission

- Promote to **New Dataset Submission**
- Review dataset submission to ensure all components are complete and correct
 1. Go to dashboard and change state to **NEW DATASET SUBMISSION** from **PENDING INTERNAL REVIEW**
 - If Demoting – change status to **DRAFT** from **PENDING INTERNAL REVIEW**
 2. Click **Save**

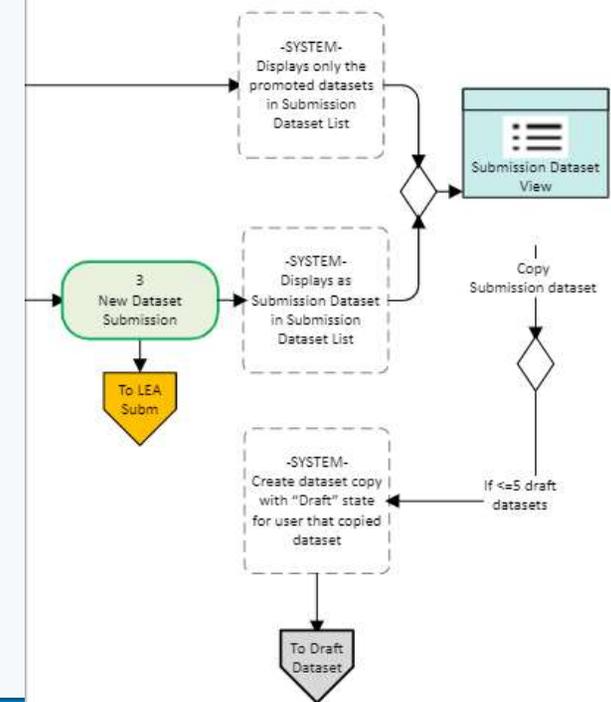
Submission Dataset – Entity Level

All LEA Users

Any LEA user under some entity, except those with EDIT DRAFT DATASET role, can see the promoted draft dataset on the Submission Dataset List and can:

- * edit when role/state allows it
- * copy (into draft area)

* For troubleshooting by related entities, users can view the dataset through sharing by the reporting entity.



LESSON 06 – Data Submissions

Change State to New Dataset Submission from Pending Internal Review

SACS Standardized Account Code Structure System | Dashboard | Import | Users | Queues | Tools | Welcome, Tami | 10-10108-0000000 Fresno County Office of Education | Fiscal Year 2022-23

Submission Queue

LEA Draft Dataset Approval

Role needed to promote: **EDIT DATASET**
Role needed to approve: **DATASET APPROVAL**
Queue(s) needed to view: **LEA DRAFT DATASET APPROVAL**

Reporting Period: Budget, July 1 | Fiscal Year: 2022-23 | Type of Data: Budget, July 1

Filter: [] | 13 column(s) selected

CDS Number	LEA Name	Number	Dataset Type	Dataset Name	Author	Reporting Period	Fiscal Year	State	State Last Upd	Assigned To	Last Assigned	Submission Notes
10-10108-0000000	Fresno County Office of Education	D8BRG1Z397	SACS	Test Fresno	Tami Montero	Budget, July 1	2022-23	Pending Internal Review	03-19-22 09:08	Not Assigned	03-19-22 09:08	

Reset sorts & filters | Page 1 of 10 | (1-1 of 1 rows)

→ New Dataset Submission

← Draft

Save

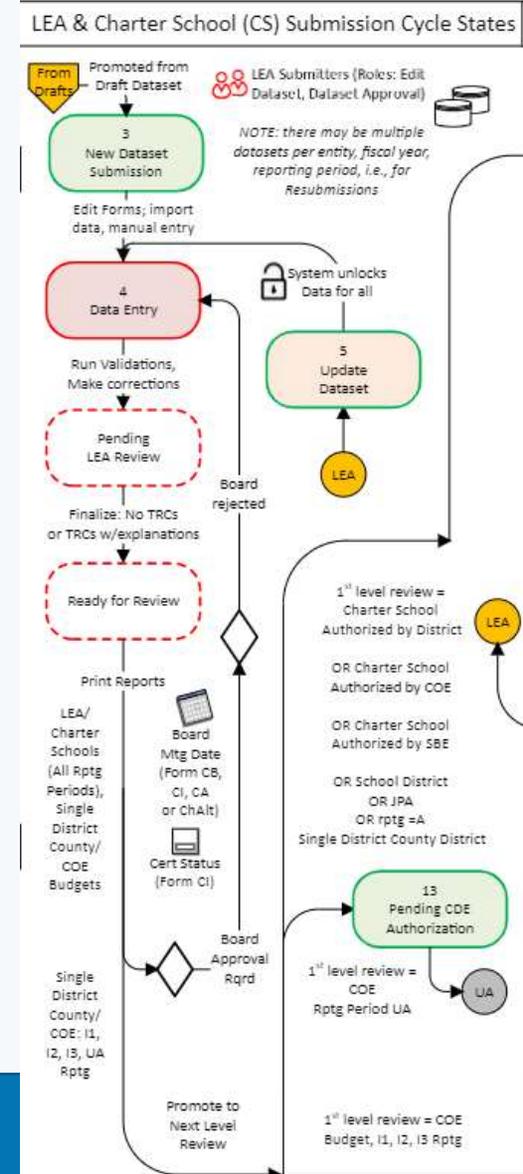


LESSON 06 – Data Submissions

Promote to Data Entry from New Dataset Submission

➤ Promote to Data Entry

1. Change the queue view to **Dataset Approval**
2. Change the State to **DATA ENTRY** from **NEW DATASET SUBMISSION**
3. Click **Save**



LESSON 06 – Data Submissions

Submission Queue

Dataset Approval

Role needed to promote: **EDIT DATASET**
 Role needed to approve: **DATASET APPROVAL**
 Queue(s) needed to view: **EDIT DATASET; DATASET APPROVAL**



Reporting Period Budget, July 1

Fiscal Year 2022-23

Type of Data Budget, July 1

Filter

11 column(s) selected

CDS Number	LEA Name	Number	Dataset Type	Dataset Name	Board Mtg Date	State	State Last Upd	Assigned To	Last Assigned	Submission Notes
10-10108-0000000	Fresno County Office of Education	D8BRG1Z397	SACS	Test Fresno	(none)	New Dataset Submission	03-19-22 09:11	Not Assigned	03-19-22 09:11	

Reset sorts & filters

<< < 1 > >>

(1-1 of 1 rows)

→ Data Entry

← Pending Internal Review

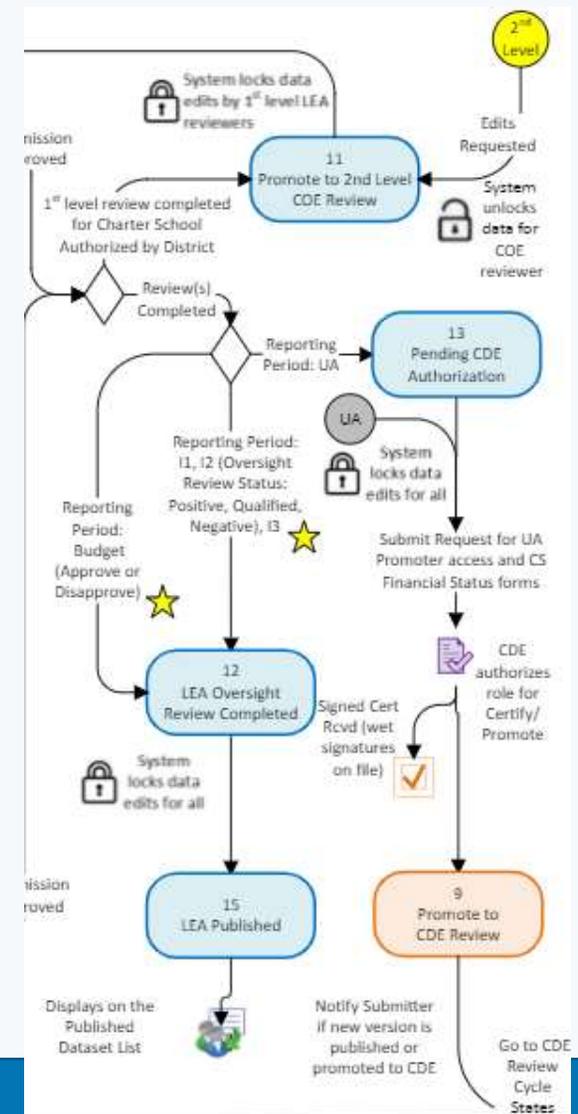
Save



LESSON 06 – Data Submissions

Promote using Oversight Queue

- Promote to LEA Oversight Review Completed (1st level review of Budget and Interims only)
 1. Change the queue view to **Oversight**
 - If Interim Submission set to **Qualified, Positive or Negative** (go to Step 3)
 - If Budget Submission set to **Approve or Disapprove** (go to Step 3)
 - If Unaudited Actuals (go to Step 4)
 2. Oversight review completed.
 3. Change State to **LEA OVERSIGHT REVIEW COMPLETED** from **1st Level LEA Review**
 4. Change State to **PENDING CDE AUTHORIZATION** from **1st Level LEA Review**
 5. Click **Save**



LESSON 06 – Data Submissions

Oversight Role in Oversight Queue Review Status

The screenshot displays the SACS Submission Queue interface. At the top, there is a navigation bar with the SACS logo, user information (Welcome, Emanuel-COE), and various menu items (Dashboard, Import, Users, Queues, Tools). The main content area is titled "Submission Queue" and "Oversight". Below the title, there are filters for Reporting Period (Budget, July 1), Fiscal Year (2022-23), and Type of Data (Budget, July 1). A table with 11 columns is shown, with the following data row:

CDS Number	LEA Name	Number	Dataset Type	Budget (Approved / Disapproved)	Board Mtg Date	State	State Last Upd	Assigned To	Last Assigned	Submission Notes
57-72686-0000000	Esparto Unified	D8BE6H9H5	SACS	Approved / Disapproved	01-22-22 00:00	Promote To 1st Level LEA Review	02-07-22 11:14	Not Assigned	02-07-22 11:14	

A dropdown menu for the "Budget (Approved / Disapproved)" column is open, showing "Approved" and "Disapproved" options. A modal dialog box is also open, showing "LEA Oversight Review Completed" and "Update Dataset" options, with a "Save" button.



LESSON 06 – Data Submissions

Oversight Role in Oversight Queue Review Status

SACS Standardized Account Code Structure System

Welcome, Emanuel-COE
57-10579-0000000 Yolo County Office of Education

Fiscal Year 2022-23

Submission Queue Oversight

Reporting Period: Budget, July 1 | Fiscal Year: 2022-23 | Type of Data: Budget, July 1

CDS Number	LEA Name	Number	Dataset Type	Budget (Approved / Disapproved)	Board Mtg Date	State	State Last Upd	Assigned To	Last Assigned	Submission Notes
57-72686-0000000	Esparto Unified	D8BEX6H9H5	SACS		(none)	Promote To 1st Level LEA Review	02-07-22 11:14	Not Assigned	02-07-22 11:14	

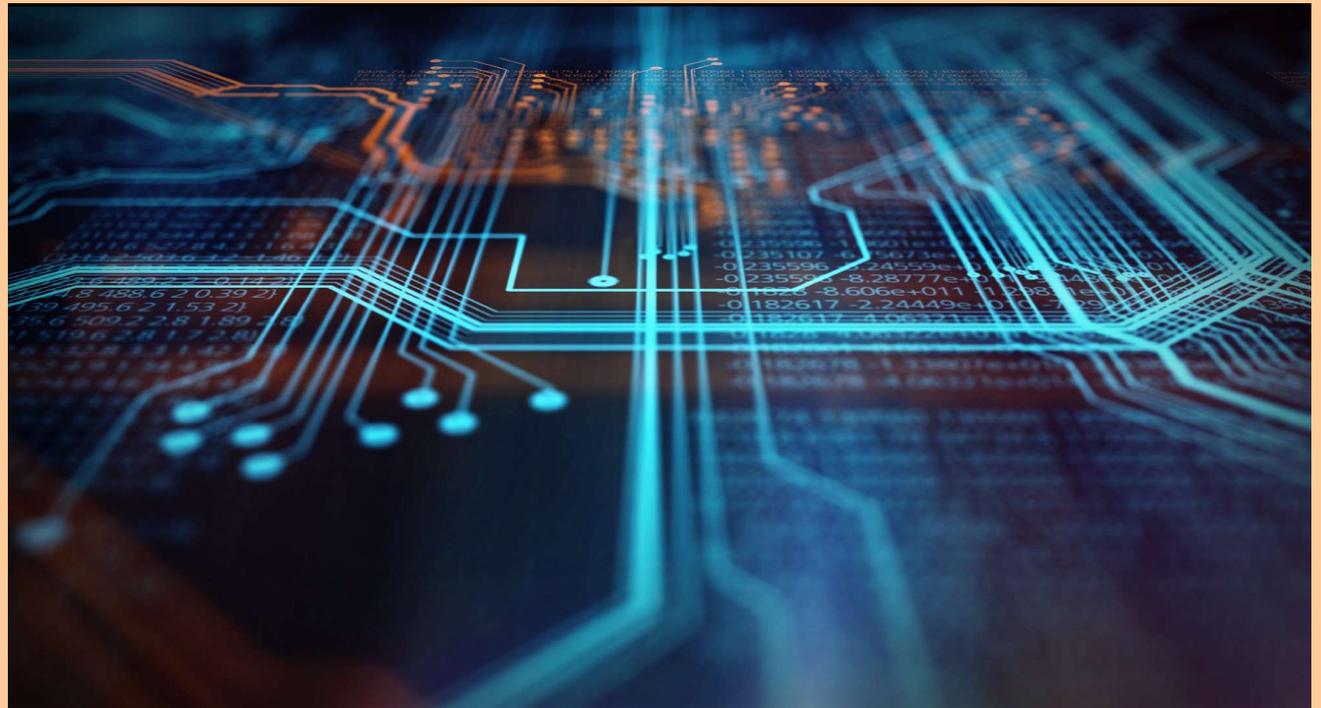
System displays **Board Mtg Date** from

- Form CB (for budget reporting period)
- Form CI (for I1, I2 reporting period)
- Form CA (for UA reporting period)



LESSON 06 – Workflow

SACS Workflow Quiz



Quiz is located at:
[Workflow Quiz](#)

