Oklahoma City

PUBLIC SCHOOLS

Cognito Forms

August 25, 2022

Why are we discussing Cognito today?

- The District processed approximately 20k stipends during FY22 using Cognito.

- Principal & Financial secretaries prepare & submit forms more than any other employee group.

- Consequently, Principals & ILDs approve more forms consistently than any other group.

- We expect to see more forms of all kinds this year.

Who should I contact?

Content Questions by Form –

Professional Membership – dbherzer@okcps.org
SAF Reporting – activityfunds@okcps.org

Stipends
- Athletics – dlcreger@okcps.org
- Federal Programs – Click here for a list of contacts
- Federal ESSER – blbanks1@okcps.org
- Federal Specialty - blbanks1@okcps.org
- Mobile Phone – compensation@okcps.org
- Night School – sdwilliams2@okcps.org
- Non Federal as listed in the CBA – compensation@okcps.org
- Visual Performing Arts – crmueller@okcps.org

Time and Effort
- ESSER – sbowman1@okcps.org
- Federal Programs – rwall@okcps.org
- IDEA – kdavis2@okcps.org

Form Issues –

My form isn't working or what form should I use?
- Barbara Banks blbanks1@okcps.org (all forms)
- Roni Colbert rmcolbert@okcps.org (SAF)

I can't find my school or wage type information.
- Barbara Banks blbanks1@okcps.org
- Roni Colbert rmcolbert@okcps.org School Information
- Sam Garcia sgarcia@okcps.org Wage Type Information

Has a stipend processed through Payroll?
- Sam Garcia sgarcia@okcps.org

What is Cognito used for?

Stipends
- Athletics - as listed in the CBA ***NEW FY23***
- Extracurricular Activities - as listed in the CBA
- Federal ESSER
- Federal Programs
- Federal Specialty Funds ***NEW FY23***
- Mobile Phone
- Night School
- Visual Performing Arts - as listed in the CBA ***NEW FY23***

Processed by Fund Manager
- SAF Reporting ***NEW FY23***
- Time & Effort - ESSER
- Time & Effort - Federal Programs
- Time & Effort - IDEA

District Forms
- Professional Membership Reimbursement
- Telework Agreement / Safety Checklist

**Coming: (Pending final review / routing updates)
- Expense Reimbursement
- Mileage Claims
- Professional Development Leave & Travel

When should you expect to receive forms for approval?

**Updates/revisions/additions to the forms are conducted the first 2 weeks of July. Forms cannot be submitted during that time. **

Busy Months	July	Aug	Sept	....	May	June
Athletic Stipends*		✔	✔	All year	✔	✔
Extracurricular Activities Stipends*		✔	✔			
Federal Programs Stipends		✔	✔	All year	✔	✔
Professional Membership Reimbursements		✔	✔			
SAF Reporting		✔	✔	All year	✔	✔
Time & Effort Reporting		✔	✔	All year	✔	✔
Visual Performing Arts Stipends*		✔	✔			

*Revisions to staff receiving stipends are submitted throughout the year.
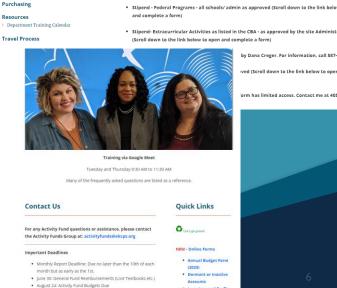
Where can I find links to the forms and more information?

Go to: Departments > Finance>

❖ Visit the Stipend Links & Resources Page @
https://www.okcps.org/Page/7117

❖ Visit the School Accounting Page @
https://www.okcps.org/Page/298

How do I successfully approve & forward a form?

All forms are similar in the way we prepare, approve and finalize; however elements below are presented slightly different in the SAF forms.

After the approval signature & approval date fields are complete, begin the **Ready – Set – Go** process.

**Ready – Set – Go **

Approver Name 1

Superwoman

Approver Email 1

swoman@okcps.org

1st Approver Date

8/17/2022

Send to Next Approver

No | | Yes

1) Ready – Slide the toggle to the Yes position indicating you are ready to send.

draw   type

3) GO – Scroll to the bottom left corner and click the button below.

Send to the next approver

2nd Approver Response

Flash Gordon,

If you approve this stipend;

2) Set –Tell Cognito where the form goes next. Click the down arrow to reveal the name and address of the next approver.

Thank You!

Approver Name 2

Flash Gordon

Approver Email 2

fgordan@okcps.org

The **Stipend Cutoff Date** refers to the date the stipend is '**Fully Approved**', not the date submitted.

Cognito sends a final report to the 'Preparer' when forms are *Fully Approved* and provides a *Processed* date in the upper left corner of your form. The processed date should meet the Stipend Cutoff Date in order for the stipend to be paid on the corresponding Paycheck Date.

Fully Approved Stipend Payment Form - Federal - ESY-Summer Learning July 8, 2022 at Heronville

OKCPS

FY23 Stipend Payment Form-Non Federal
Processed 8/16/2022 6:32 PM

Entry #
FY23_1032

Group
Admin

Run a manpo
Click here fo

OKCPS

FY23 Stipend Payment Form-Federal Programs

Entry #   Processed
FY23_6   8/18/2022

This form contains 11515 entries

Activity
Activity Title   Date / Date Range of Activities
Leadership IT Week Planning   July 19, 2022

OKLAHOMA CITY PUBLIC SCHOOLS
Payroll Processing Calendar for FY2023
July 1, 2022 through June 30, 2023

*** Stipend Cutoff is 2 business days before payroll cutoff**

	Paycheck Date	Stipend Cutoff Date EOD**	Payroll Cutoff Date 3:00 pm
13	July 15, 2022	07/05/22	07/07/22
14	July 29, 2022	07/19/22	07/21/22
15	August 15, 2022	08/03/22	08/05/22
16	August 31, 2022	08/19/22	08/23/22
17	September 15, 2022	09/02/22	09/07/22
18	September 30, 2022	09/20/22	09/22/22
19	October 14, 2022	10/04/22	10/06/22
20	October 31, 2022	10/19/22	10/21/22
21	November 15, 2022	11/02/22	11/04/22
22	November 30, 2022	11/16/22	11/18/22
23	December 15, 2022	12/05/22	12/07/22
24	December 30, 2022	12/14/22	12/16/22
1	January 13, 2023	01/03/23	01/05/23
2	January 31, 2023	01/20/23	01/23/23
3	February 15, 2023	02/03/23	02/07/23
4	February 28, 2023	02/15/23	02/17/23
5	March 15, 2023	03/03/23	03/06/23
6	March 31, 2023	03/21/23	03/23/23
7	April 14, 2023	04/04/23	04/06/23
8	April 28, 2023	04/18/23	04/20/23
9	May 15, 2023	05/03/23	05/05/23
10	May 31, 2023	05/19/23	05/22/23
11	June 15, 2023	06/05/23	06/07/23
12	June 30, 2023	06/20/23	06/22/23

Additional Resources

<u>Having trouble locating forms emailed from Cognito?</u>

Try setting up incoming email filters directing all emails from Cognito to a pre-determined folder/label. No more combing through your inbox to find pending forms. If you need help setting this up, please visit our stipend page: **https://www.okcps.org/Page/7117**

<u>Out in the field and need to approve a form?</u>

Cognito offers a flexible on-line form that shrinks to the device display. Form approval can be completed anywhere your mobile device has Wi-Fi connection and access to email. Simply open the email and process as usual.

<u>I don't know who should approve or what codes I should use.</u>

Cognito is equipped to offer all of the information needed to complete a submission.

<u>Reassignment of Stipends: How do I stop a staff member from receiving a stipend and add a new staff member?</u>

The forms are equipped with a drop down asking '***Will any of the stipends below replace a stipend at *?***' By answering yes, Cognito will offer a table to remove the current staff member; allowing the incoming staff member to be added to the Staff Data table. If the new team member has not been identified, a form can be submitted at a later date with the new staff member's information.

Barbara Banks 587-0184
blbanks1@okcps.org

Questions:
1) **Why are we discussing Cognito?**
2) **Who to contact?**
3) **What is processed through Cognito?**
4) **When will I receive the forms?**
5) **Where can I get additional information?**
6) **How do I successfully submit a form?**
7) **Other**