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Review / Revision History			
Revision No.	Date	Description	Approved By
0	August 2017	Phase 1 Go-Live	
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1.0   OBJECTIVE

This manual aims to guide Electric Cooperatives in filling out and submitting Data Entry Templates (DET) in the NEA Web Portal. This must be observed in order to successfully provide data on the EC's compliance in trainings, external audits, and customer service standards. This also aims to monitor the presence of the different types of technologies that an EC has. The performance rating of the Board of Directors and General Manager are also provided to monitor the performance evaluation of the BOD and GM and if the standard parameters are met. Finally, this also aims to track if the different reportorial requirements are submitted on time or not. These data are mostly for NEA to monitor each EC's compliance of requirements and some of the data are formed in the Customer Service Standards Monitoring analytical view.

2.0   SCOPE

This manual establishes the guidelines of Data Entry Template (DET) standardization, the field mapping from old report to new DET format, and the procedures for the submission of DET035 Compliance Assessment in the NEA Web Portal System performed by Electric Cooperatives (ECs).

3.0   DEFINITION OF TERMS

Data Entry Field	-	Intended value of the data entry field.
Data Entry Template (DET)	-	Input Templates used to fill out information and submitted by the ECs to the Web Portal for NEA acknowledgement and reports generation. These templates serve as sources of inputs in the generation of reports.
Description	-	Brief explanation of the data entry field.
DET035 – Compliance Assessment	-	Data entry template used to record external audit details, customer service standards compliance, good governance ratings, and reportorial requirement information for PSMR population purposes.

Existing Report	-	Data entry field equivalent in the existing report.
Existing Report Field Equivalent	-	Data entry field equivalent in the existing report.
Existing Report Table	-	Section where the data entry field can be located in the existing report.
Formula	-	Computation equivalent of the data entry field.
List of Values (LOV)	-	Defined values under the dropdown tab.
Monthly Institutional Report (MIR)	-	An operational report submitted by the EC to NEA that contains the EC's institutional detail updates for the reporting month.
Performance Standard Monitoring Report (PSMR)	-	Report submitted by the EC to NEA every semester for NEA's consumption and guide on how to rate each EC's performance.
Reporting Month	-	The month covered by the data being reported. This is the data for the month earlier than the current month (Month X – 1).
Required? (Y/N)	-	Indicates if a field is required to be filled up or not.
Source	-	Indicates if field information is a data entry or calculated automatically in the data entry template.
Validation Rules	-	Standard values that should be entered in the data entry field or criteria that should be followed.

4.0   ROLES AND RESPONSIBILITIES

Electric Cooperative (EC)	-	Responsible for accomplishing, submitting, revising, and resubmitting of DETs. Also accountable for the correctness and accuracy of the submitted data through the DETs.
NEA DET Reviewers	-	Responsible for acknowledging/ reviewing the submitted DETs by the ECs.

5.0 MANUAL

This DET is composed of the following tables:

TABLE NAME	PURPOSE
Training	
External Audit	
Customer Service Standard	
Information, Education, & Communication Technology	
Good Governance	
Reportorial Requirements	

The table below presents the definition of each data entry field that corresponds to the columns found in the tables in the DET.

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
EC Name	The acronym of the Electric Cooperative (EC). *List of dropdown values will refer to Master List – EC Profile. (E.g. BENECO, CENPELCO, INEC, etc.).*	Y	Data Entry	**N/A**	Value should be selected from the list of dropdown values.	PSMR	(Header)	Electric Cooperative
Reporting Year	The year during which the data is being reported. *List of dropdown values will be years from 2017 to 2070.*	Y	Data Entry	**N/A**	Value should be selected from the list of dropdown values.	PSMR	(Header)	Performance Standard Monitoring Report Reportorial Compliance For the Month of <month> <year>
Reporting	The month during which	Y	Data Entry	**N/A**	Value should be	PSMR	(Header)	Performance

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
Month	the data is being reported. *List of dropdown values will be months from January to December.*				selected from the list of dropdown values.			Standard Monitoring Report Reportorial Compliance For the Month of <month> <year>
Training Table								
Are there changes in any data this reporting month?	Refers if there are new/ additional data from the previous month. *Values in the dropdown list are Yes, No.* **Yes** = If there are changes in data from the previous month. **No** = If there are no changes in data from the previous month.	Y	Data Entry	**N/A**	Value should be selected from the list of dropdown values.	*New*	*New*	*New*
Capacity Building: No. of Training per Employee per Year	The number of training/s of an employee per year. *Values in the dropdown list are More than One (1), At Least One (1), Not All Employees w/ at Least One (1) Training.*	N	Data Entry	**N/A**	Fill out field if 'Are there changes in any data this reporting month?" is equal to Yes. Value should be selected from the list of dropdown values.	*New*	*New*	*New*
External Audit Table								
Are there changes in any data this reporting month?	Refers if there are new/ additional data from the previous month. *Values in the dropdown list*	Y	Data Entry	**N/A**	Value should be selected from the list of dropdown values.	*New*	*New*	*New*

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
	are Yes, No. **Yes** = If there are changes in data from the previous month. **No** = If there are no changes in data from the previous month.							
Covering Period From	The starting period that covers the changes of data of the reporting month.	N	Data Entry	**N/A**	Fill out field if 'Are there changes in any data this reporting month?" is equal to Yes. Date must be earlier or same date as today. Date format should be **MM/DD/YYYY.**	*New*	*New*	*New*
To	The ending period that covers the changes of data of the reporting month.	N	Data Entry	**N/A**	Fill out field if 'Are there changes in any data this reporting month?" is equal to Yes. Date must be later or same as **Coverage Period From.** Date must be earlier or same date as today. Date format should be **MM/DD/YYYY.**	*New*	*New*	*New*
Publish Date of Audit Report	Date when an audit report is published. Note that audit reports are usually published months after.	N	Data Entry	**N/A**	Fill out field if 'Are there changes in any data this reporting month?" is equal to Yes. Date must be later or same as **Coverage**	*New*	*New*	*New*

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
					Period From. Date must be earlier or same date as today. Date format should be **MM/DD/YYYY.**			
External Audit Rating	Rating of an external auditor to an EC. *Values in the dropdown list are Qualified, Unqualified.* **Qualified** = If there are findings that the EC has no standards in energization. **Unqualified** = If it passed the audit; if the EC followed the standards in energization.	N	Data Entry	**N/A**	Fill out field if 'Are there changes in any data this reporting month?" is equal to Yes. Value should be selected from the dropdown list.	PSMR	Institutional Parameters – 1. Human Resource: Leadership and Management - a. Good Governance	a.3 NEA Audit Rating
Customer Service Standard Table								
Customer Service Parameter	The different parameters that describe the expected response of an EC to member-consumers.	Y	Display	**N/A**	None.	*New*	*New*	*New*
Compliance	The expected response time of an EC to member-consumers regarding the service parameters.	Y	Display	**N/A**	None.	*New*	*New*	*New*
Actual	The actual response time of the EC to member-consumers.	Y	Data Entry	**N/A**	Value should be a whole number. For decimal values, round up to the next whole number.	PSMR	Institutional Parameters – 2. Stakeholders	a. Customer Service Standard

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
Information, Education, & Communication Technology								
Information, Education & Communication Technology Parameter	Available technologies the EC can have: Website, Hotline for Complaints, Short Messaging System, Online Tellering, Automated Meter Reading, and Billing & Collection (MRBC).	Y	Display	**N/A**	None.	*New*	*New*	*New*
Technology Exists?	Determines if the technology exists in the EC or not. *Values in the dropdown list are Yes, No.* **Yes** = If the type of technology exists in the EC. **No** = If the type of technology does not exist in the EC.	Y	Data Entry	**N/A**	Fill out the following fields if EC is tagged as **On-Grid**: Website, Hotline for Complaints, Short Messaging System, Online Tellering, Automated Meter Reading, Billing & Collection (MRBC). Fill out the following fields if EC is tagged as **Off-Grid**: 'Website', 'Hotline for Complaints', 'Short Messaging System' and 'Online Tellering'. Value should be selected from the list of dropdown values.	PSMR	Institutional Parameters – 2. Stakeholders	c. Information, Education & Communication Technology
Good Governance Table								
Performance Rating of Board of Directors	Performance evaluation of the Board of Directors given by an EC.	N	Data Entry	**N/A**	Fill out field if the value of Reporting Month is 'June' or 'December'. Values should be	PSMR	Institutional Parameters – 1. Human Resource:	a.1 Performance Rating of Board of Director

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
	Values in the dropdown list are Compliant, Partially Compliant, Non-Compliant. **Compliant** = If the performance rating of the Board of Directors is compliant with the standard parameters of the EC. **Partially Compliant** = If the performance rating of the Board of Directors is partially compliant with the standard parameters of the EC. **Non-Compliant** = If the performance rating of the Board of Directors is do not comply with the standard parameters of the EC.				selected from the list of dropdown values.		Leadership and Management – a. Good Governance	
Performance Rating of General Manager	Performance evaluation of the General Manager given by NEA. *Values in the dropdown list are Very Satisfactory, Satisfactory, Fair, Poor.* **Very Satisfactory** = If NEA is very satisfied with the performance of the General Manager of the EC. **Satisfactory** = If NEA is satisfied with the performance of the	N	Data Entry	**N/A**	Fill out field if the value of Reporting Month is 'June' or 'December'. Values should be selected from the list of dropdown values.	PSMR	Institutional Parameters – 1. Human Resource: Leadership and Management – a. Good Governance	a.2 Performance Rating of General Manager

Data Entry Field	Description	Required? (Y/N)	Source	Formula	Validation Rules	Existing Report	Existing Report Table	Existing Report Field Equivalent
	General Manager of the EC. **Fair** = If NEA is fairly satisfied with the performance of the General Manager of the EC. **Poor** = If NEA is poorly satisfied with the performance of the General Manager of the EC.							
Reportorial Requirements								
Report - Audited Financial Statement	Financial Statement audited by an accredited external user.	N	Data Entry	**N/A**	Date must be earlier or same date as today. Date format should be **MM/DD/YYYY.**	PSMR	Reportorial Requirements	Audited Financial Statement
Report - Enhanced Integrated Computerized Planning Model (eICPM)	A model that links all subject areas (Finance, Institutional, Technical, Projects) to come up with one work plan. Ex: Get the total budget of operations of each subject area for proper allocation for the operations.	N	Data Entry	**N/A**	Date must be earlier or same date as today. Date format should be **MM/DD/YYYY.**	PSMR	Reportorial Requirements	Enhanced Integrated Computerized Planning Model (eICPM)

6.0   PROCEDURE

7.0   REFERENCE

NEA BIT Support Process

NEA BIT Support
Process.pdf

8.0   ATTACHMENTS

9.0   RECORDS