



January 30, 2019  
Prendergast Library  
Jamestown, NY



## 2018 Annual Report

For New York State Public Libraries

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## Getting Started

- Why do we do Annual Reports?
- Don't delay; deadline for Submission to the System is **Wednesday, February 20**
- You will not receive your first Materials Grant Plan payment until it is received
- Login at <http://collectconnect.baker-taylor.com:8080/login.aspx>
- Now compatible with Chrome, Firefox, & IE
- Ask Jan if you don't know your login info
- Handouts: [cclslib.org](http://cclslib.org) - For Librarians - Annual Report
- Format of this presentation...

... Ask Questions as we go!

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## Your Annual Report Consultants:

**Please contact the following "experts" if you have questions:**

Jan Dekoff      [jdekoff@cclslib.org](mailto:jdekoff@cclslib.org)  
General Questions & Technical Glitches, Central Libraries Staff, Minimum Standards, Trustees (Sections 6, 7, 10)

Kathy Gustafson      [kgustafson@cclslib.org](mailto:kgustafson@cclslib.org)  
Financials (Sections 11, 12, 13, 14, 15)

Valle Blair      [vblair@cclslib.org](mailto:vblair@cclslib.org)  
Programs and Public Service (Sections 1, 3, 8, 9)

Megan Disbro      [mdisbro@cclslib.org](mailto:mdisbro@cclslib.org)  
Collections, Transactions, Tech, and Telecoms (Sections 2, 4, 5)

Carolyn Hughesman      [chughesman@cclslib.org](mailto:chughesman@cclslib.org)  
Sirsi & Koha Reports

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## Your Annual Report

### Workflow

- After submitting, email Megan: mdisbro@cclslib.org
- If you are not able to submit because Parts 2 & 4 have not been completed by the system, please contact Megan
- Consultants will review their parts and let you know if there are questions. Please respond in a timely manner.
- Jan will let you know when all is satisfied

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## Summary of Changes

- **CollectConnect:** new version of software from B&T
- **Part 5:** E-rate?  
Social Media?
- **Part 9:** Makerspace?
- **10.2-10.5** Unlocked. Edit check if different from last year
- **Section 10 Trustee Entries-** Template of spreadsheet of 2018 to update and email to B&T

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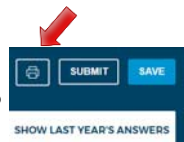
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## Important Reminders

- Give us an explanation in a note if a difference of +/- 20% from last year
- Printing: print a copy for yourself. No need to print and send us one
- We cannot submit any reports to the State until **ALL of our libraries** have submitted to us



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1. GENERAL LIBRARY INFORMATION  
 2. LIBRARY COLLECTION  
 3. LIBRARY PROGRAMS, POLICIES, AND SERVICE  
 4. LIBRARY TRANSACTIONS  
 5. TECHNOLOGY AND TELECOMMUNICATIONS  
 6. STAFF INFORMATION  
 7. MINIMUM PUBLIC LIBRARY STANDARDS  
 8. PUBLIC SERVICE INFORMATION  
 9. SERVICE OUTLET INFORMATION  
 10. OFFICERS AND TRUSTEES  
 11. OPERATING FUNDS RECEIPTS  
 12. OPERATING FUND DISBURSEMENTS  
 13. CAPITAL FUND RECEIPTS  
 14. CAPITAL FUND DISBURSEMENTS  
 15. CENTRAL LIBRARIES  
 16. FEDERAL TOTALS

**LIBRARY USE**

3.1 Library visits (total annual attendance)

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### Financial Sections 11-14

- This report is Cash basis– only report money actually received and disbursed in 2018.
- Round to the nearest whole dollar, no cents.
- **Your Operating Fund Balance at the beginning of 2018 must match what you reported at the end of 2017.**
- Please include Notes where requested.  
 Notes = List of \$\$ amounts AND description.  
 Look in Presentation for

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### 11—Operating Fund Receipts

- **11.1 Local Public Funds:** Report all money received from towns, villages, cities, school districts. Remember a public vote does not mean the vote of a town, village, school, city board; rather it means individual residents who voted on a funding proposition placed before them at an election.
- **11.3-11.7 System Cash Grants To Member Library:** CCLS provides these figures in a Memo. Do not add anything to these figures.
- **11.9 Other State Aid:** Report here any legislative member items, Bullet Aid, Arts Decentralization grants, Construction grants (if you do not have a separate capital fund) or any other state aid you received directly (not through CCLS).

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## 11—Operating Fund Receipts

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- **11.14 Gifts and Endowments:** Money received from private individuals, foundation grants, or Friends' groups. **N**
- **11.15 Fund Raising:** Money from special fundraising activities or events, but **NOT receipts from booksales.** **N**
- **11.16 Income from Investments:** Interest on bank accounts, earnings on investments and endowments deposited into the operating fund.
- **11.17 Library Charges:** Copy machine receipts, fine money, hold/reserve fees, printer and fax fees. **N**

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## 11—Operating Fund Receipts

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- **11.18 Other Receipts:** Any receipts that do not fit into any other category. **Booksale receipts go here.** **N**
- **11.22-11.23 Transfers:** If you transferred any money from a capital fund or a memorial fund into your operating fund, report the amounts here. **N**
- **11.25 -** The ending balance of funds as reported on Line 12.40 on the 2017 report!

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## 12—Operating Fund Disbursements

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- **12.1 - 12.2 Salaries & Wages Paid from Library Funds:** Report gross wages here - wages before any deductions have been made. Do not include independent contractors. Report only wages for employees included in Part 6.
- **12.4 Employee Benefits Expenditures:** Report only the Library's share of Social Security and Medicare taxes (FICA), Disability Insurance, Workers' Compensation, Unemployment Insurance, Retirement benefits, Health Insurance benefits. **DO NOT INCLUDE** employees' share of their individual withholdings. **N**

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## 12—Operating Fund Disbursements



- **12.6 – 12.9** Collection expenditures. Refer to definitions for these categories as found in Part 2 of Annual Report instructions.
- **12.10-12.11 Capital Expenditures from Operating Funds\*:** Expenditures for vehicles, buildings, building additions and new items for the building. For example, a new roof, a new furnace, furniture. **N**
- **12.13-12.14 Repairs to Building & Building Equipment\*:** A repair includes things like fixing a leaking roof, repairing a furnace, plumbing repairs, etc. **N**

**\*IMPORTANT:** Report expenditures in both these categories on Lines 12.11 and 12.14. (Unless your local public funding body (as reported in Line 11.1) ordered you to spend the money it gives you on a capital item or a repair.)

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## 12—Operating Fund Disbursements



- **12.16 Other Disbursements for Operation & Maintenance of Buildings:** Utilities, property insurance, custodial and cleaning supplies, contracts with cleaning people, snow removal, lawn mowing, etc. If your library does not pay utilities, please indicate so in a Note. **N**
- **12.18 Office and Library Supplies:** Report paper, library cards, book pockets and jackets, computer/printer paper, copier paper, stationery, pens, pencils, paper clips, tape, photocopier supplies, and bank checks costs here.
- **12.19 Telecommunications:** Report telephone costs and Internet provider costs here.

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## 12—Operating Fund Disbursements



- **12.20 Binding Expense**
- **12.21 Postage and Freight** – Stamps, UPS, FedEx
- **12.22 Professional and Consultant Fees:** Auditors, Attorneys, Educators, Program Presenters, Performers and other consultants. If any consultant fee is more than \$10,000, describe in a Note. **N**
- **12.23 Equipment:** Record costs of such items as photocopiers, fax machines, computers, printers, scanners, rentals/leases of equipment and office equipment repairs, maintenance contracts, etc. If any expense exceeds \$10,000 or 5% of the library's budget, whichever is higher, indicate in a Note how the funds were spent. **N**

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## 12—Operating Fund Disbursements

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- **12.24 Other Miscellaneous:** Report any other costs which do not fit into the above categories. For example: program supplies such as craft items, membership dues, volunteer recognition costs, food, lost materials and bank fees. If any expense exceeds \$10,000 or 5% of the library's budget, whichever is higher, indicate in a Note how the funds were spent. **N**
- **12.27-12.32 Debt Service:** Refer to State Instructions for Details
- **12.34-12.37 Transfers:** If you transfer money from the Operating fund to the Capital fund or other fund.

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## 12—Operating Fund Disbursements

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### ■ **Line 12.41 Must Equal Line 11.26:**

Beginning Operating Fund Balance + Receipts + Transfers In =  
Ending Operating Fund Balance + Disbursements + Transfers Out.

If you start 2018 with \$10,000 + received \$100,000 you had  
\$110,000 in 2018.

If you end 2018 with \$20,000 you MUST have spent \$90,000 in  
2018.

**If not....there's a mistake somewhere!**

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## 13—Capital Fund Receipts

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- **13.2 All Other Revenues** Put Grants from Foundations here
- **13.4 State Aid Received for Construction**
- **13.8 Transfers from Operating Fund** Funds deposited in your Operating Fund account and then transferred to Capital Fund (same as line 12.36)
- **13.12-** The ending balance of funds as reported on Line 14.11 on the 2017 report!

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## 14—Capital Fund Disbursements



- **14.1 Construction:** Payments to contractors for construction costs.
- **14.2 Incidental Construction:** Architect fees, site acquisition, furniture and other equipment, legal services, surveyors, etc.
- **14.3 – 14.6 Other Disbursements:** Refer to State Instructions for Details
- **Line 13.13 must equal Line 14.12.**



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## 1- General Library Information



- **1.23 Library Home Page URL** – copy from the address bar when on the webpage – enter the same URL in Section 9, Q10.
- **1.37-1.45 – Enter for CURRENT library director**
- **1.41-1.42 – Educational level of the library director**  
If you mark Other, please enter the director's/ manager's educational level in the Note.
- **1.43 Active Public Librarian's Certificate for staff in public librarian positions?**  
If NO for any staff in a *public librarian's position*, enter name & email in a Note.

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## 1- General Library Information



- **1.46 Is the library a member of NYS and Local Retirement System?** Answer NO if a member of the NYS Teacher's Retirement System.
- **1.47 Does the Library charge fees for library cards to people residing outside the system's service area?** Answer YES if you charge a fee to an individual who does not reside in Chautauqua or Cattaraugus counties.

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### 1- General Library Information



▪ **1.48 Was all or part of the library's funding subject to a Public Vote in 2018?**

- Provide details about public votes held in 2018.
  - 6a previous amount
  - 6b amount of increase
  - 6c new amount (6a + 6b)
- Use repeating groups for votes from different entities.
- Compare to what is entered in 11.1.
- If NO, skip to 1.49.

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### 1- General Library Information



▪ **1.49 Did the library receive funding that was approved by a public vote in a previous year?**

- Provide details about a public vote held in a previous year that is *still in effect*.
- If there is a vote from a different entity that was held in a previous year, enter it here.
- Use repeating groups for votes from different entities. Compare to what is entered in 11.1.

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### 1- General Library Information



▪ **1.50 Contract to serve areas not chartered under a library?** A written contract to serve, for a fee, areas that are outside your chartered area of service and that are not chartered by any library.

- **1.51 Unusual Circumstances** Answer NO unless circumstances affected statistics significantly – reduced by 20% or more. Compare door counts and circulation numbers to last year.

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## 2- Library Collections

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- Total Holdings as of December 31, 2018
- **The system will input figures from SIRSI & KOHA reports**  
Lines that may not be available via the reports:
  - **2.8 Total Uncataloged Books**
  - **2.9 Total Print Serials** (if not cataloged) *VOLS. NOT ISSUES*
  - **2.14 Local Electronic Collections** (your library databases) *1+ (Ancestry Library Edition + library's)*
  - **2.23 Other Non-Electronic Materials** (films, slides, CD-ROMs for patrons that are not cataloged)
  - **2.26 Current Print Serial Subscriptions** (changes?)

Include notes if you make any changes!!

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## 3- Programs, Policies, & Services

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- **3.1 Library Visits** If you don't keep a daily tally, count an average week and multiply by 52. Add a Note if you borrowed the System's counter.
- **3.2 Registered resident borrowers** The number of your cardholders who live within your Chartered to Serve Area.
- **3.3 Registered non-resident borrowers** The number of your cardholders who live outside your Chartered to Serve Area. Include patrons for contracted areas here. Carolyn will send a Koha report of your borrowers as of 12/31/18.

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## 3- Programs, Policies, & Services

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- **3.4-3.9 Written Policies** Answer all YES. Board-approved written policies should be on file at the library. If you do not have any of these policies, contact Jan.
- **3.15 Is the library registered for services from the NYS Talking Book and Braille Library?**  
Answer YES. Tom Vitale registered all member libraries with Talking Book & Braille last year.

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### 3- Programs, Policies, & Services



- A program is an event held at the library or another location in which the library is the primary contributor of time, money, or people in the planning or presentation.
- Each session is an individual program.
- Do not count programs with zero attendance.
- Do not count staff or volunteers presenting or assisting with the program as attendees.

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### 3- Programs, Policies, & Services



- Children are defined as people who are 11 years of age and under.  
Young Adults are defined as ages 12 through 18.
- Count a program under the *intended primary audience*, Adults, Young Adults, or Children.
- Where there is no clear intended primary audience or it is a family program, enter in **3.19 Other Programs**
- Count everyone, regardless of age, in the *intended primary audience* attendance figures.

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### 3- Programs, Policies, & Services



- **3.16-3.28 Total Programs and Attendance** for 2018. Enter the *total* number of programs and the *total* attendance for each age group for the year. *Include a program only once in these totals.*
- The following sections are a breakdown of these total numbers into specific categories.
- Some programs can be included in multiple sections.
- **3.19 All Other Programs** Events that have no clearly identifiable *intended primary audience*.

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### 3- Programs, Policies, & Services



■ **3.21 & 3.28** One-on-one sessions are scheduled events. If 2 people come for one scheduled session and both are helped, count it as 2 sessions and 2 attendance. Walk-ins are counted as a reference question in Part 4.

■ **3.22 Group Presentations/Information Tables** Answer YES only if staff, trustees, or volunteers are present providing information about the library.

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### 3- Programs, Policies, & Services



■ **3.29-3.42 Summer Reading** Information provided should match Summer Reading reports submitted in September.

■ **3.43-3.50 Collaborators** A collaborator must actively participate; they must provide assistance or service for a specific program. Transporting children to the program or providing space for a program qualifies as a collaborator. *Donors of money or goods and schools notifying children about the program do not count as collaborators.*

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### 3- Programs, Policies, & Services



■ **3.51-3.57 Early Literacy** Programs for children, birth to entering kindergarten – preschool, toddlers, babies.

- **a.** Focus on birth-school entry – for children *only*
- **b.** Focus on parents & caregivers – for adults *only*
- **c.** Combined audience – a preschool program that is an enriched storytime, providing early literacy tips for parents/caregivers OR a parent training that is planned to include children.
- A collaborator must actively participate.

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### 3– Programs, Policies, & Services

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- **3.58-3.63 Adult Literacy** These programs are specifically for *adults with low literacy skills*. Do not count programs for general adults here.
- **3.64-3.75 ESOL Programs** These are programs for those *learning English whose first language is not English*.
- **3.76-3.80 Digital Literacy** Programs include classes that teach basic or advanced computer or digital skills: email accounts, social media, MS Office, Quickbooks, online job searches and/or applications, digital cameras, e-readers, etc.

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### 3– Programs, Policies, & Services

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- **One-on-one sessions in Adult, ESOL, and Digital Literacy.**
  - These are *scheduled* sessions. They can be appointments for individuals or scheduled walk-in times.
  - Each person assisted in a scheduled walk-in time counts as a one-on-one session.
  - If 2 people come for a one-on-one scheduled session and both are helped, count it as 2 sessions and 2 attendance.

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### 4—Library Transactions

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- **The system will input CIRC figures from SIRSI & KOHA reports**  
*Lines not available via SIRSI & KOHA:*
- **4.12 Use of Electronic Materials** (CIRC requires authentication & lending period – All OverDrive CIRC)
- **4.13 Successful Retrieval of Electronic Information** (authentication required but no lending period; # of records supplied/viewed; count: Ancestry Library Edition, NOVELny, & your local databases)
- **4.18 Total Reference Transactions:** What counts as a Reference Transaction?
- **4.19 Does the library offer virtual reference?** Can patrons email questions? Say YES if you link your email address on your website.

[cclsny.org](https://cclsny.org) > For Librarians > Annual Reports

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## 5—Technology & Telecom.

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- **5.4 Annual number of visits to the library's web site?** You can include: [website hits](#), [Enterprise Room hits](#), [Facebook's daily total reach](#), and [Twitter engagements](#). Add a local note stating what's included in this line.
- **5.5 Does the library use Internet filtering software on any computer?** If you receive eRate, say YES
- **NEW 5.6** Does your library use social media?
- **NEW 5.7** Does the library file for E-rate benefits?
- **NEW 5.8** Is the library part of a consortium for E-rate benefits?
- **NEW 5.9** If yes, in which consortium are you participating?
- **5.10 – 5.12:** List Mike Jones as IT contact if your library does not have IT support.

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## 6—Staff Information

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- 6.1: Use the weekly hours of the employee who works the most weekly hours each week to calculate FTE's (usually the director/manager)
- Note: Include FTE's for all positions funded in the library's budget whether those positions are filled or not.
- Note: Report salaries as of December 31, 2018. This is NOT year-to-date paid out, but the contractual annual salary (for hourly employees multiply hourly rate x average weekly hours x 52)
- Note: Include only employees whose wages are reported on Line 12.3.

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## 7—Minimum Standards

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- EVERY member library should be able to answer each question with a YES. If not, contact Jan!  
[Bylaws](#), [Long Range Plan](#), [Annual Report to the Community](#), [Policies](#), [Presents Budget to Funding Agencies](#), [Evaluates Collection and Services](#), [Minimum Hours for Population Served](#), [Maintains an Adequate Facility](#), [Provides Equipment and Connections to meet the Community's Needs](#) (phone, copier, fax, computer, and printer), [Distributes printed information about the library](#), [Employs a paid Director or Manager per minimum standards](#)

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## 8—Public Service Information

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- **8.4 Other Outlets** Count Deposit Collections that you provide to nursing homes, senior centers, daycare centers, schools, etc. on this line.
- **8.6-8.9 Minimum Weekly Hours** Enter hours from your shortest scheduled week (not a holiday week). This number must meet the minimum hours listed in the Public Library Standards chart (see Part 7 of DLD Instructions)
- **8.10-8.13 Annual Total Hours** should be equal to or greater than the answer to 8.6 (or 8.9) times 52.

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## 9—Service Outlet Info

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- **9 Q26 Total number of Internet terminals used by the public** If your answer is different from last year's, explain in a Note.
- **9 Q27 Number of public computer uses** If you do not have a sign-in process, take a tally in an average week and multiply by 52.
- **9 Q29-30 Upload/download speed** Test both speeds each year. [www.speedtest.net](http://www.speedtest.net)

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## 9—Service Outlet Info

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- **9 Q32 Wifi Access** Are passwords or a library card required? Is the wifi turned off when the library is closed? Use Other and add a Note if you have more than one.
- **9 Q33 Number of Wireless Sessions** Each connection is 1 session no matter how long they are connected. Count sessions from outside the library and when the library is closed. If the System has your figures we will provide them. Please contact Carolyn if you need help accessing Google Analytics data.

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## 9—Service Outlet Info



- **9 Q34 Interactive Videoconferencing Capability for Patrons** Do your Public Access Internet Computers have cameras and microphones? Allow Skype, Facetime, etc.?
- **9 Q35-36 Accessibility** Are your entry and all parts of your outlet accessible to persons in wheelchairs? <https://www.access-board.gov/guidelines-and-standards/buildings-and-sites/about-the-ada-standards/background/adaag#lib>
- **NEW – 9 Q37** Does your outlet have a Makerspace?

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## 10—Trustees and Officers



Unlocked this year!

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## 10—Trustees and Officers



- Reminder: Use Feb 1, 2019 information to complete this section, not 2018. For each Trustee:
- Report house numbers (no one in New York State lives in a house without a number).
- List President as first trustee.
- Except in the case of board officers, the answer to Line 9 (Office Held) is "trustee".
- Provide e-mail addresses for all of your trustees
- Reminder: Treasurer is now Financial Officer

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## 10-Trustees and Officers

OR...

You may 1) enter the data for the Officers and Board Members directly into the survey as usual or 2) send Baker and Taylor the data for this section to be uploaded into Collect. If you choose to send your data for uploading, you must enter the data into the spreadsheet form available in the survey by clicking [here](#). Complete this form and email it to [biblostst@btol.com](mailto:biblostst@btol.com).

Question Number	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Description	TRUSTEE	TRIPNAME	TRILNAME	TRADORS	TRICITY	TRIZIP	TRERIAL	TRIPFICI	TRBGNM	TRBTEP	TRICATEM	TRDATEY	TERMSSEP	GATHDA	IOATMPL	NEW TR
Abira Hall Memorial Library	Mrs.	Barbara	Knauff	180 Oak Hill Boston	02128	Quincy	Trustee	January	2014	December	2018	Yes	01/15/2015	01/15/2019		
Abira Hall Memorial Library	Mrs.	Katrina	Cochran	54 Central Boston	02128	Katecott	Secretary	January	2014	December	2018	Yes	01/15/2015	01/15/2019		
Abira Hall Memorial Library	Mr.	Charles	Burton	45 W. Mt. Vernon	02128	Burton	Trustee	January	2014	December	2018	Yes	01/08/2015	01/08/2019		
Abira Hall Memorial Library	Mrs.	Elsa	Gustafson	9524 E. La Westfield	02128	Abira	Trustee	January	2013	December	2017	Yes	01/15/2015	01/15/2019		
Abira Hall Memorial Library	Mr.	Jay	Handberg	8623 Webb Portland	04789	Handberg	Financial	January	2013	December	2017	Yes	01/06/2015	01/06/2019		
Abira Hall Memorial Library	Mr.	Charles	Kahler	5684 Park Fredonia	04803	Shuvaloff	Vice Pres	October	2013	December	2018	No	01/08/2015	01/08/2019		

Disclaimer: This is still relatively new. We have no idea how long this will take once you update it! If using this method do it ASAP!

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## 10-Trustees and Officers

- The number of trustee records must match the number or range reported in Line **10.3**.
  - So, if you have vacant positions, select Vacant in question 1
    - \*Tip: **SAVE** after entering each trustee\*
- **Oath of Office:** Only answer if public or district. Association libraries report N/A
- **Is this a Brand New Trustee?** Only answer yes if the Trustee has never served on *any* Library Board in the past

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## 10-Trustees and Officers

### Most Common Problems:

- Number of entries not matching stated number of trustees
- Public Libraries without Oath information
- Previous year's terms different than current
- Term Lengths Miscalculated

### Example of 5 year terms:

January 2016 to December 2020 ✓  
 January 2016 to January 2021 ✓  
 January 2016 to December 2021 X (that's 6 years)

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## Lastly

- Click on Show Status to check and complete Edit Checks. Red edit checks messages must be transformed to green by completing the requested Note (Federal or State).



- Check to see if you have any unanswered questions; complete them if you do.



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## Lastly

- Print a copy for your files.



- Do not send us a copy.
- When you have printed your copy click on the Blue SUBMIT button. This will lock you out of your report and will enable CCLS to begin its checking function.
- Remember to email Megan when you have submitted or if you are done but sections 2 and 4 are not complete.
- Great job! We will get back to you with questions. Please respond quickly!

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January 30, 2019  
Prendergast Library  
Jamestown, NY



Questions?

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