CPB ISIS 101

LEARNING HOW TO USE THE INTEGRATED STATION INFORMATION SYSTEM

Presented by Kortnei Morris (Program Coordinator)
AGENDA

What is CPB ISIS?

Who can access CPB ISIS?

Updating the Grantee Profile

Reporting

Completing the CSG Agreement

Common Problems

Resources

FAQs
# Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISIS</td>
<td>Integrated Station Information System</td>
</tr>
<tr>
<td>CSG</td>
<td>Community Service Grant</td>
</tr>
<tr>
<td>COE</td>
<td>Certification of Eligibility</td>
</tr>
<tr>
<td>SAS</td>
<td>Station Activity Survey</td>
</tr>
<tr>
<td>SABS</td>
<td>Station Activities Benchmarking Study</td>
</tr>
<tr>
<td>AFR</td>
<td>Annual Financial Report</td>
</tr>
<tr>
<td>FSR</td>
<td>Financial Summary Report</td>
</tr>
</tbody>
</table>
What is CPB ISIS?
What is CPB ISIS?

- Update Contact Info
- Update Station Info
- Certifying your CSG Agreement
- Review Grant Info
- Change Payment Info
- Submit Reports and Surveys
- Request Extensions
Who Can Access CPB ISIS?
## Who Can Access CPB ISIS

<table>
<thead>
<tr>
<th>Role</th>
<th>Access Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Head of Grantee</strong></td>
<td>Highest-ranking representative of the station’s management responsible for station’s operations.</td>
</tr>
<tr>
<td><strong>Licensee Official</strong></td>
<td>Licensee’s governing body chair or vice chair; or a designated senior level representative who is not a member of the station’s management.</td>
</tr>
<tr>
<td><strong>Survey Administrators</strong></td>
<td>Individual(s) responsible for completing and submitting the SAS and/or SABS surveys.</td>
</tr>
<tr>
<td><strong>AFR Reviewer</strong></td>
<td>Individual(s) with read-only access to financial reports.</td>
</tr>
<tr>
<td><strong>Grants Administrator</strong></td>
<td>Individual(s) responsible for administrative tasks within the database.</td>
</tr>
<tr>
<td><strong>Independent Accountant</strong></td>
<td>Stations with a total revenue of $300,000 or more per reporting year are required to have an independent accountant.</td>
</tr>
</tbody>
</table>
Updating Grantee Profile
Updating Grantee Profile

- Security Groups
- Audit Details
- Organization Contact Details
- Station Contact Details
- Additional Grantee Details
- Transmitter/Translator Details
### Updating Grantee Profile

<table>
<thead>
<tr>
<th>Organization Contact Details</th>
<th>Security Groups</th>
<th>Transmitter/Translator Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 4-digit grantee ID number</td>
<td>• Head of Grantee</td>
<td>Provides a list of current</td>
</tr>
<tr>
<td>• Licensee information</td>
<td>• Licensee Official</td>
<td>transmitters and translators</td>
</tr>
<tr>
<td>• Physical mailing address</td>
<td>• AFR Reviewer</td>
<td></td>
</tr>
<tr>
<td>• Joint licensee information</td>
<td>• Grants Administrator(s)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Survey Administrator(s)</td>
<td></td>
</tr>
</tbody>
</table>

### Additional Grantee Data

(RADIO ONLY)

<table>
<thead>
<tr>
<th>Additional Grantee Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Population density</td>
</tr>
<tr>
<td>• Coverage area population</td>
</tr>
<tr>
<td>• Audience service station designation</td>
</tr>
<tr>
<td>• CSG level</td>
</tr>
</tbody>
</table>

### Audit Details

This section is completed by CPB.

### Station Contact Details

<table>
<thead>
<tr>
<th>Station Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>• General Manager</td>
</tr>
<tr>
<td>• CFO</td>
</tr>
<tr>
<td>• Head of Programming</td>
</tr>
<tr>
<td>• Head of Development</td>
</tr>
<tr>
<td>• Head of Engineering</td>
</tr>
</tbody>
</table>
## Updating Grantee Profile

### Organization Contact Details

<table>
<thead>
<tr>
<th>Entity ID</th>
<th>Licensee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fiscal Year Begin Date</th>
<th>Licensee Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Associated Grantees</th>
<th>Licensee Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mailing Address</th>
<th>Primary Street Address</th>
<th>Licensee Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment Address</th>
<th>Alternate Payee Address</th>
<th>Business Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alternate Interconnection Information</th>
<th>Employer Identification Number</th>
<th>Type of Entity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Security Groups

<table>
<thead>
<tr>
<th>Grantee Administration</th>
<th>Title: Executive Director</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grantee Administration</th>
<th>Title: President</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Head of Grantee</th>
<th>Title: Executive Director</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Independent Accountant</th>
<th>Title: Auditor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SA's Radio</th>
<th>Title: Executive Director</th>
</tr>
</thead>
</table>
Updating Grantee Profile

Transmitter / Translator Details

<table>
<thead>
<tr>
<th>Transmitter / Translator</th>
<th>Channel / Frequency</th>
<th>Community of License (Per FCC Records)</th>
<th>Analog / Digital</th>
</tr>
</thead>
</table>

Additional Grantee Data

Population Density:
Rural Audience Service Station Status:
Coverage Area Population:
CSG Level:
Minority Audience Service Station:
Licensed to and/or Serving Native American Tribes:
Historically Black College/University:
Primary Programming Format is News:
Updating Grantee Profile

Station Contact Details

No Audit history available for this grante

Audit Details

Grantee Profile

Organizational Contact Details

Security Groups

Transmitter/Translator Details

Additional Radio Grantee Data (2020)

Audit Details

General Manager/Executive Director:

Chief Financial Officer:

Head of Development:

Head of Programming:

Head of Production:

Head of Engineering:

Head of Community Outreach:

Have you reviewed the Grantee Profile?  Yes  No

Save
Once again, you can use the “+” to expand the profiles. Remember...

- If you need to add a user, simply click “add user” and complete all fields in the profile.
- One person can fulfill several roles within the security groups.
- We advise for you to have at least 2 grants administrators. That ensures that you have someone in the system to make administrative changes and push reports/agreements through should a grants administrator leave.
### Updating Grantee Profile

**Radio: Head of Grantee**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>Interim Station Manager</td>
</tr>
<tr>
<td>Security Group</td>
<td>Licensee Official</td>
</tr>
<tr>
<td></td>
<td>Grantee-AFR Reviewer</td>
</tr>
<tr>
<td></td>
<td>Independent Accountant</td>
</tr>
<tr>
<td></td>
<td>Grantee-Grants Administrator</td>
</tr>
<tr>
<td></td>
<td>Head of Grantee</td>
</tr>
<tr>
<td></td>
<td>SAS-Radio</td>
</tr>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Zip Code</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td></td>
</tr>
<tr>
<td>User Name</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
</tr>
</tbody>
</table>

**Add to Co-Licensed Grantees (optional)**

**Active:**
- Yes
- No

[Save] [Cancel]
Reporting
## Financial Reporting

**AFR Status:** Not Submitted

Forms Due on: February 13, 2020

### Forms Required for 2019

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Current Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule A: Direct Revenue</td>
<td>Not Started</td>
</tr>
<tr>
<td>Schedule E: Expenses &amp; Investment in Capital</td>
<td>Not Started</td>
</tr>
<tr>
<td>Schedule F: Reconciliation</td>
<td></td>
</tr>
<tr>
<td>Signature Page</td>
<td>Available</td>
</tr>
<tr>
<td>Capital Asset Allocation</td>
<td>Not Included</td>
</tr>
<tr>
<td>Accountant’s Qualification Statement</td>
<td>Not Started</td>
</tr>
<tr>
<td>Audited Financial Statements</td>
<td>Not Started</td>
</tr>
</tbody>
</table>
**First- 45 Day Extension**

- Log into isis.cpb.org
- Click “Financial Reporting”
- Scroll down and click “Extension Request Form”
- Click the yellow “Add Extension Request” button
- Click “Submit Extension” once finished.

**Second- 30 Day Extension**

- Log into isis.cpb.org
- Click “Financial Reporting”
- Scroll down and click “Extension Request Form”
- Click the yellow “Add Extension Request” button
- Prepare letter signed by both the Head of Grantee and Independent Accountant explaining the circumstances of the delay. Upload it online in the “Extension Request” section.
- Click “Browse” to upload required explanation letter.
- Select the appropriate PDF file from your computer and select “Open”.

### Extension Request (2019)

**REQUEST FOR AN EXTENSION OF TIME TO FILE CPB ANNUAL REPORTS**

<table>
<thead>
<tr>
<th>Extension Number</th>
<th>New Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1/14/2020</td>
</tr>
<tr>
<td>2.</td>
<td>2/13/2020</td>
</tr>
</tbody>
</table>
### SAS - RADIO: STATION ACTIVITY (SALARY) SURVEY

<table>
<thead>
<tr>
<th>Year</th>
<th>Last Modified</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>N/A</td>
<td>N/A</td>
<td>Not Released</td>
</tr>
<tr>
<td>2018</td>
<td>2/12/2019</td>
<td>02/15/2019</td>
<td>Approved</td>
</tr>
</tbody>
</table>

The SAS-Radio survey is available for data entry.
<table>
<thead>
<tr>
<th>Subsections</th>
<th>Original Submitter</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Questions: 1.1-1.7</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>Salary Report Questions: 2.1</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>Governing Board Questions: 3.1-3.2</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>Community Outreach Activities Questions: 4.1</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>Radio Programming and Production Questions: 5.1</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>Local Content and Services Report Questions: 6.1</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
<tr>
<td>Journalists Questions: 7.1</td>
<td></td>
<td></td>
<td>Completed</td>
</tr>
</tbody>
</table>

Survey due on 02/15/2019

Submit to CPB
<table>
<thead>
<tr>
<th>Year</th>
<th>Last Modified</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>1/18/2020</td>
<td>02/15/2020</td>
<td>Not Started</td>
</tr>
<tr>
<td>2018</td>
<td>4/23/2019</td>
<td>02/15/2019</td>
<td>Approved</td>
</tr>
</tbody>
</table>

The SABS survey is available for data entry!
### Extension Requests

**Survey due on 02/15/2020**

<table>
<thead>
<tr>
<th>Subsections</th>
<th>Original Submitter</th>
<th>Last Updated</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Station Information Questions: 1.1-1.2</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Revenue Questions: 2.1-2.2</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Expenses Questions: 3.1-3.6</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Corporate Management &amp; Support Questions: 4.1</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Development Questions: 5.1-5.7</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Underwriting Questions: 6.1-6.5</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Programming Questions: 7.1-7.4</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Production Questions: 8.1-8.2</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Content Distribution &amp; Delivery (CD&amp;D) Questions: 9.1-9.4</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Educational Services Questions: 10.1-10.5</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
<tr>
<td>Community Engagement Questions: 11.1-11.2</td>
<td></td>
<td></td>
<td>Not Started</td>
</tr>
</tbody>
</table>

[Submit to CPB](#)
SAS & SABS Surveys

SAS Survey

The SAS-Radio survey is available for data entry.

Survey Status

Status: Approved

Survey due on 02/15/2019

Subsections
- Employment Questions: 1.1-1.7
- Salary Report Questions: 2.1
- Governing Board Questions: 3.1-3.2
- Community Outreach Activities Questions: 4.1
- Radio Programming and Production Questions: 5.1
- Local Content and Services Report Questions: 6.1
- Journalists Questions: 7.1

Extension Requests

No new extension request can be submitted after April 1st.

<table>
<thead>
<tr>
<th>Extension Number</th>
<th>New Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ 1</td>
<td>3/15/2020</td>
</tr>
</tbody>
</table>

SABS Survey

Survey due on 02/15/2020

Subsections
- Station Information Questions: 1.1-1.2
- Revenue Questions: 2.1-2.2
- Expenses Questions: 3.1-3.6
- Corporate Management & Support Questions: 4.1
- Development Questions: 5.1-5.7
- Underwriting Questions: 6.1-6.5
- Programming Questions: 7.1-7.4
- Production Questions: 8.1-8.2
- Content Distribution & Delivery (CD&D) Questions: 9.1-9.4
- Educational Services Questions: 10.1-10.5
- Community Engagement Questions: 11.1-11.2
Completing CSG Agreement
Completing CSG Agreement

Legal Forms

Legal Forms due on June 30, 2020
Based on your grante profile, you will be required to complete the following forms:

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Current Status</th>
<th>Completed By</th>
<th>Next Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio CSG Agreement and Certification of Eligibility</td>
<td>Not Started</td>
<td></td>
<td>Grants Administrator must review</td>
</tr>
<tr>
<td>Grantee Profile</td>
<td>Completed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The "yellow" Route for Approval button will display once all the forms, including the Grantee Profile, have been completed by the Grants Administrator.

Ready to Route these forms to the Licensee Official and Head of Grantee?
If so, click the yellow route for approval button. After both the Head of Grantee and Licensee Official certify the forms, the forms will automatically be submitted to CPB.

For inquiries, please send an email to csg@cpb.org.
Parts of your CSG Agreement and Certification of Eligibility

I. Licensee/Grantee Information

<table>
<thead>
<tr>
<th>ID</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grantee Name</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
</tr>
<tr>
<td>Licensee Name</td>
<td></td>
</tr>
<tr>
<td>Licensee Type</td>
<td></td>
</tr>
</tbody>
</table>
Parts of your CSG Agreement and Certification of Eligibility

1. Grant Offer, Acceptance and Conditions

A. Grant Offer and Acceptance: CPB offers and Grantee accepts the grants (Grant(s)) set forth in Section III below, subject to all the terms and conditions herein and subject to Grantee’s certification that it complies with requirements described in Sections IV and V below. CPB has calculated and offered the Grants in reliance and contingent upon the accuracy of the following:

1. The representations and warranties made by Grantee to qualify for and receive the Grants.

2. Grantee’s FY 2018 audited financial statements (or unaudited if permitted by CPB) and Annual Financial Report (AFR) or Annual Financial Summary Report (FSR).

B. Conditions: In addition to the terms and conditions stated herein, this Agreement incorporates by reference and Grantee must fully comply with the Communications Act of 1934, 47 U.S.C. § 396, et seq. (Communications Act or Act), CPB’s Television Community Service Grant General Provisions and Eligibility Criteria (General Provisions), the Financial Reporting Guidelines and the Application of Principles of Accounting and Financial Reporting Applicable to Public Telecommunications Entities. These documents are incorporated herein by reference as if fully set forth herein.
Completing CSG Agreement

Parts of your CSG Agreement and Certification of Eligibility

III. Grant Amounts and Spending Period

A. **Grant Amounts**: Below are the Grants and their amounts awarded by CPB to Grantee for all of Grantee’s television stations. Grantee must expend the Grants during the period set forth below.

   - **Community Service Grant (CSG)**, **Universal Service Support Grant (USSG)**, and **Distance Service Grant (DSG)** Spending Period: 10/01/2019 - 09/30/2021
   - **Interconnection Grant (IC)** Spending Period: 10/01/2019 - 09/30/2020

Grant Amounts & Spending Period
Parts of your CSG Agreement and Certification of Eligibility

Communications Act Compliance

Grantee certifies that it currently meets each of the following criteria as indicated below.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Open Meetings</td>
</tr>
</tbody>
</table>
Completing CSG Agreement

Parts of your CSG Agreement and Certification of Eligibility

V. Selected General Provisions Requirements

Grantee certifies that it currently complies with each of the following requirements in the General Provisions.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>A. Annual Compliance Training Requirements</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Grantees must complete at least one CPB-sponsored compliance training session annually.</td>
</tr>
</tbody>
</table>

Does Grantee comply with this requirement?
Completing CSG Agreement

Parts of your CSG Agreement and Certification of Eligibility

VI. Signatures

CORPORATION FOR PUBLIC BROADCASTING
Ted Krichels, SVP, System Development & Media Strategy

October 1, 2019

This Agreement must be executed by the licensee official and the head of grantee. The licensee official for the licensee’s governing body is chair or vice chair; for other licensees, is the licensee’s governing body designated senior level representative, who is not a member of the station’s management and who has into binding contracts on the licensee’s behalf. The head of grantee is the highest-ranking representative responsible for station operations, i.e., its president and chief executive officer.
Completing CSG Agreement

Legal Forms

Show all data for: 2020

For inquiries, please send an email to csg@cpb.org.

Status: Released

Forms due: June 30, 2020

Legal Forms due on June 30, 2020

Based on your grantee profile, you will be required to complete the following forms:

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Current Status</th>
<th>Completed By</th>
<th>Next Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio CSG Agreement and Certification of Eligibility</td>
<td>Not Started</td>
<td></td>
<td>Grants Administrator must review</td>
</tr>
<tr>
<td>Grantee Profile</td>
<td>Completed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Ready to Route these forms to the Licensee Official and Head of Grantee? If so, click the yellow route for approval button. After both the Head of Grantee and Licensee Official certify the forms, the forms will automatically be submitted to CPB.
Common Problems
Forgotten Password?

Common Problems

Resetting your Password

• Go isis.cpb.org and click the ‘Reset Password’ link near the bottom of the Login Page. When requested, enter your username or email address and Submit.

• The System will then send a temporary password to the email address noted on your Security Groups profile. The temporary password and your username should then be entered on the Login Page – click Login, and an Account page will open. From there, the temporary password should be reentered on the Current Password line and a newly created password, using the password criteria below, entered and confirmed.

Password Criteria:
• The new password that you create must be at least eight characters;
• One uppercase and one lowercase letter and
• One number or special character such as ($@%?&)
Where is our Payment?

1st Payment Requirements
- Completed and saved the Grantee Profile
- Completed and submitted the CSG Agreement & Certification of Eligibility

2nd Payment Requirements
- Completed and submitted the AFR/ FSR
- Completed and submitted the SABS and/or SAS Surveys
- Local Content and Service Report (TV grantees ONLY)
Have I...?

• Completed the station’s grantee profile?
• Routed the report to the Head of Grantee and Independent Accountant for signature?
• Had both the Head of Grantee and the Independent Accountant sign off on the signature page?
• Click submit on the Financial Reporting Main page?
Resources
FAQs

Do you have questions? Ask them here!