

1 Reporting Requirements

The recipient must be fully capable of either manually entering data or uploading batch files to the EDMIS II system, a centralized data collection and reporting system that summarizes the data, or other system as designated by the SBA. Mandatory training on EDMIS II is provided at the WBC Program annual training conference.

The recipient must report to the SBA:

- Quarterly data (via EDMIS),
- Quarterly performance narratives,
- Economic impact data from client follow-up (reported via the EDMIS Impact Data Entry Screen), and
- Financial reports (related to advance or reimbursement requests).

The SBA may, at its sole discretion, withhold payments if reports are not received or are deemed insufficient.

a Data Reports

WBC Quarterly Counseling & Training (EDMIS II)

Due: No later than 30 days after the close of each fiscal quarter (October 30; January 30; April 30; and July 30).

Review: The recipient may review and correct data for 5 business days following the 30 day window at the close of the quarter.

- (i) The recipient is required to report program data to the SBA's EDMIS II, a centralized data collection system, by either manually entering data or uploading batch files.
- (ii) The recipient may use EDMIS II (or other system as designated by the SBA) as their primary MIS if the system meets all of its MIS needs. However, the recipient may also choose to maintain existing or complementary systems if it requires more extensive data collection. The data collection tools are—
 - (a) Counseling Information Form, SBA Form 641, Parts I, II and III; and
 - (b) Management Training Report, SBA Form 888,
 - (c) or their equivalents
- (iii) The formats in EDMIS II are based on the above forms. The recipient must use EDMIS II, the above forms, or comparable forms to collect and report data. Copies of these forms must be retained at the WBC and available for review by the SBA (See Recordkeeping Requirements, below).