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What is the Project Status Report (PSR)?

The PSR is a year-to-date report containing key *Thrivent Builds Homes* (TBH) build progress and milestone information for each Thrivent Regional Financial Office (RFO) and Habitat Affiliate. The report is used monthly by the TBH Project Team to manage the project, identify gaps or areas of concern, and reach goals in order to succeed in building homes on time.

Accessing your PSRs

Your PSRs are located in the Thrivent Builds database located on a secured LAN drive. On or before the last day of each month, Community Engagement Teams (CETs) must use this process to submit their PSRs so that the Thrivent Builds Group receives the most up-to-date information.

1. **First-time users:** A week before the PSR due date, send an email to “BOX Thrivent Builds Homes” to request access to the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR>
2. You will receive an email notification when access has been approved, generally within 3-4 business days.
3. After updating the PSRs, if desired, print a copy of each home update for your records.
4. Open **Windows Explorer** (Right-click on the Start button and select Explore) and navigate to the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\PSR>. Note: If this is your first time accessing the secured LAN drive, you may want to add it to your **Favorites** for easy future access.
5. Double-click on the file “Shortcut to Thrivent Builds PSR” to open the database.

Important Reminder:

First-time LAN users must request access to secured LAN drive at least one week before needed.

Have questions about the “Secured LAN Drive?”

Contact the Technology Service Center at 800-847-4836, at the voice prompt, say "Directory", dial 34357, press 1 to reach the Corporate Service Center, press 8 for all questions. Or send an email to BOX TSC. The direct phone number is 920-628-4357.

Monthly PSR Reporting Process

1. One week prior to each monthly project team meeting:
 - ✓ Habitat Affiliate Project Leader sends the updated Affiliate Monthly Report to the Thrivent Community Engagement Team (CET) and Organizational Development Consultant-Thrivent (ODC-T).
 - ✓ Chapter Specialist completes online reporting for funds raised and Gifts-in-Kind pledged and received, which **(1a)** generates the Thrivent Builds Activity Focus Report. (*Note: This report is updated on a weekly basis every Monday.*)

- The CET uses the Affiliate Monthly Report and the Thrivent Builds Activity Focus Report to update the PSR, and emails an updated copy to each team member prior to the monthly team meeting. *(Note: the Affiliate Monthly Report has been updated for 2012 and is available on [Thrivent Builds Resources](#).)

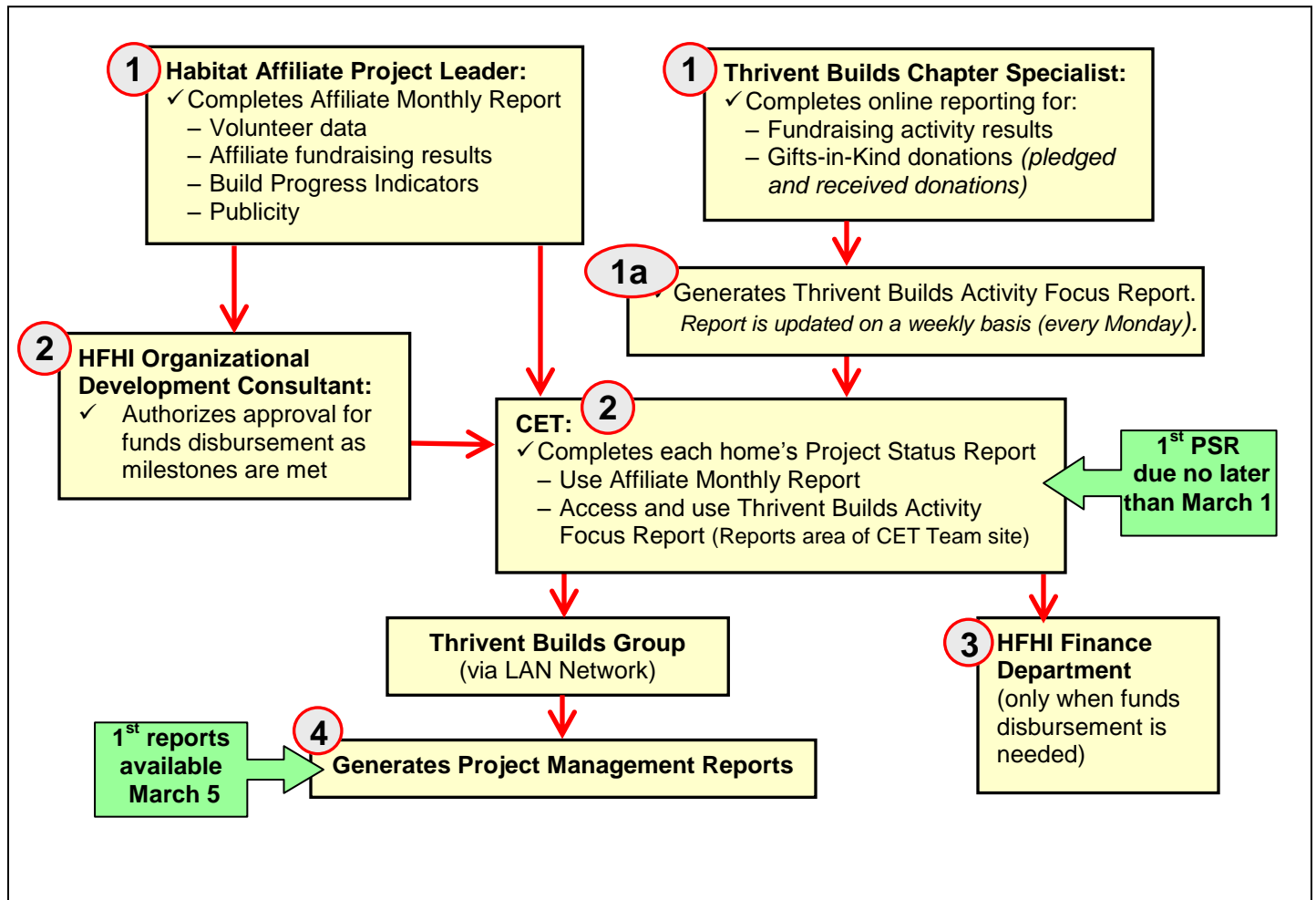
Each team member reviews the report to identify issues, builds at risk of not being completed by December 31, and other concerns or gaps regarding the TBH project and prepares to discuss at the next team meeting.

The first PSR is due on March 1, 2012. Then, on or before the last day of each month (starting with March 31) the CET updates each home's PSR in the Thrivent Builds database:

[T:\CustInfo\Frat\Thrivent Builds Shared\PSR](#) (see page 1 of this guide for details on accessing the database).

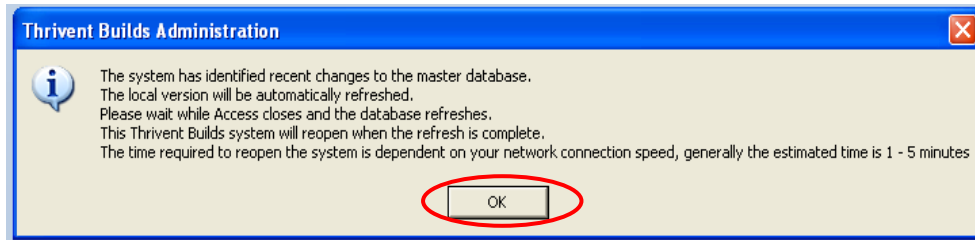
- Authorizing the release of funds to affiliates.** When the CET and ODC-T have checked "Yes" (on the PSR) for a particular home's milestone completion and are ready to authorize the release of funds, the CET **emails** Kellie-Ann Brown (thriventgrants@habitat.org) in HFHI's Finance Department and **copies** their appropriate ODC-T. Indicate which affiliate(s) and home(s) is/are ready for a disbursement.
- Project Management Reports are available after March 5** at www.thriventbuilds.com/resources.

Monthly Project Status Report Process

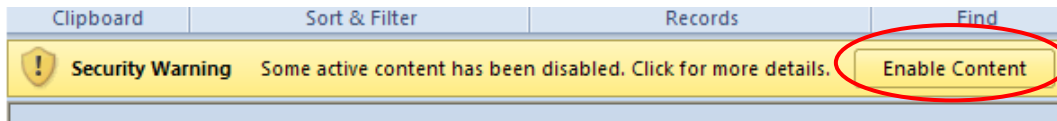


Using the PSR

1. Open Thrivent Builds database (see instructions on page 1). If this message appears, click **OK**.



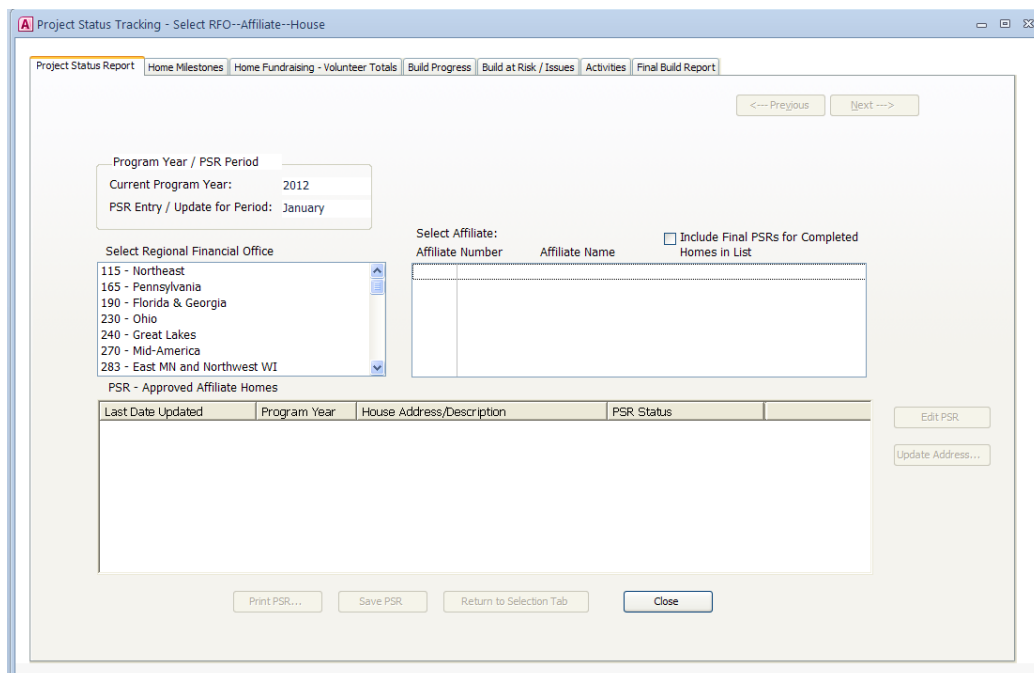
2. Whenever this Security Warning appears, click **Enable Content**.



3. The Main Menu displays when entering the database. Click **Add/Update Project Status Report**.



4. This is the screen that displays:



5. On the Project Status Report tab, select an RFO. The affiliate name(s) populates.
6. Select the affiliate name. The approved home(s) will display at the bottom.
7. Click to highlight the specific home you want to update; then click **Edit PSR**.

Home address is displayed here.

Additional information for each home is displayed in this section.

Click here to update house address.

Click here to Print PSR.

Last Date Updated	Program Year	House Address/Description	PSR Status
12-08-2011 02:26 PM	2012	375 S Reads Way	INPROGRESS
12-08-2011 02:29 PM	2012	207 S Reads Way	INPROGRESS
12-08-2011 08:10 AM	2012	457 Appleton Rd	INPROGRESS

8. On the Home Milestones tab, specify the Milestone statuses at least once per reporting period by clicking **Yes** or **No** on each Milestone. *Note: An error message will appear if you fail to select Yes or No.*

Moving between tabs will update and save data.

Use 'Previous' and 'Next' buttons, or click on tabs to move between tabs.

Click here to Save PSR. Note: Moving between tabs will also save data.

Click here to return to the Main PSR Screen to select a different PSR or Affiliate.

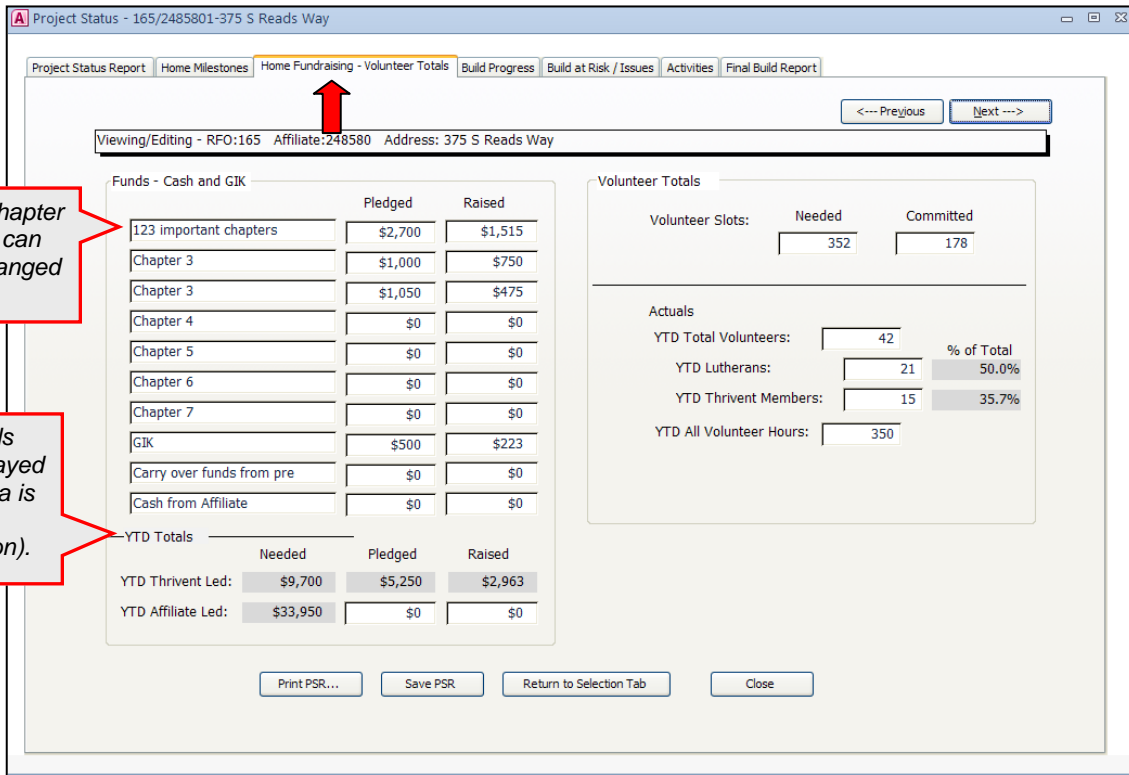
Preparedness Milestone Due Date: 3/1/2012

Resource Milestone Due Date: Before Volunteers Are On Site

Completion Milestone Due Date: 1/15/2013

Total House Cost: \$97,000.00 Thrivent Award per Home: \$53,350.00

9. Click the **Home Fundraising-Volunteer Totals** tab.
10. Enter the funds pledged and raised by the chapter(s), volunteers needed and committed, and actual volunteer results.



Project Status - 165/2485801-375 S Reads Way

Project Status Report Home Milestones **Home Fundraising - Volunteer Totals** Build Progress Build at Risk / Issues Activities Final Build Report

Viewing/Editing - RFO:165 Affiliate:248580 Address: 375 S Reads Way

<-- Previous Next -->

Funds - Cash and GIK		Pledged	Raised
123 important chapters		\$2,700	\$1,515
Chapter 3		\$1,000	\$750
Chapter 3		\$1,050	\$475
Chapter 4		\$0	\$0
Chapter 5		\$0	\$0
Chapter 6		\$0	\$0
Chapter 7		\$0	\$0
GIK		\$500	\$223
Carry over funds from pre		\$0	\$0
Cash from Affiliate		\$0	\$0

Volunteer Totals	
Volunteer Slots: Needed	352
Committed	178

Actuals

YTD Total Volunteers: 42

YTD Lutherans: 21 50.0% of Total

YTD Thrivent Members: 15 35.7%

YTD All Volunteer Hours: 350

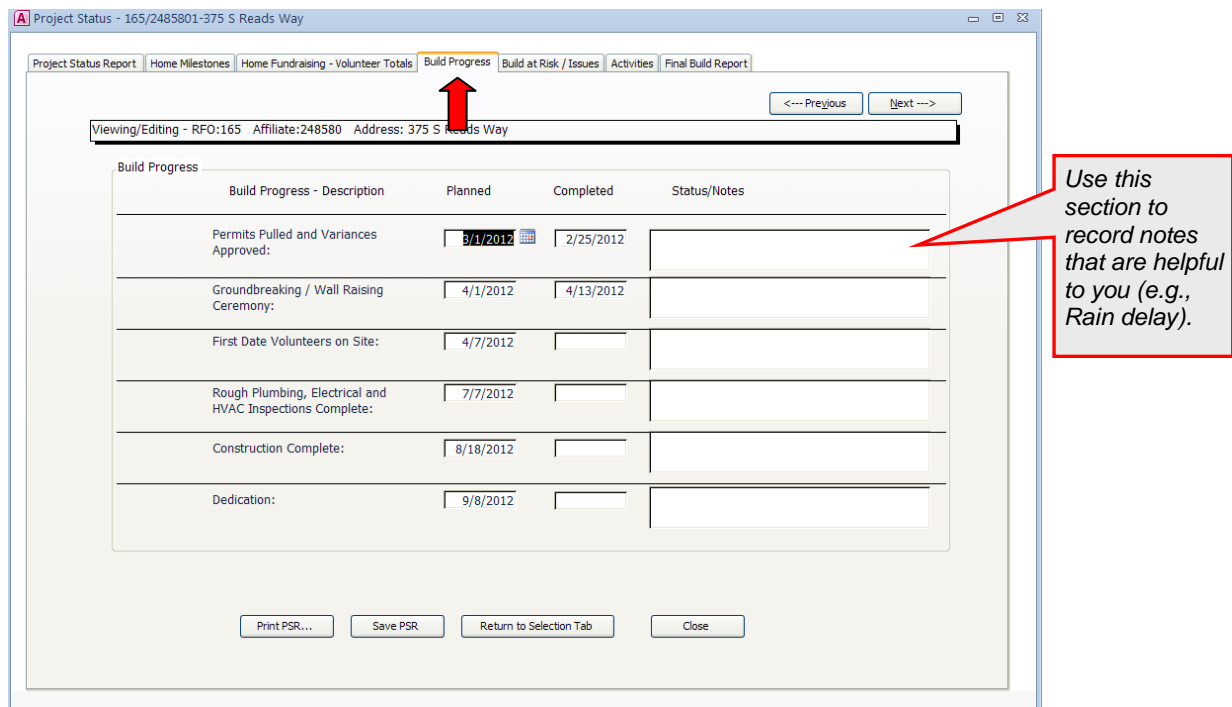
YTD Totals		Needed	Pledged	Raised
YTD Thrivent Led:		\$9,700	\$5,250	\$2,963
YTD Affiliate Led:		\$33,950	\$0	\$0

Print PSR... Save PSR Return to Selection Tab Close

The chapter name can be changed here.

YTD totals are displayed here (data is from the application).

11. Click the **Build Progress** tab.
12. Enter the information needed provided from the Affiliate.



Project Status - 165/2485801-375 S Reads Way

Project Status Report Home Milestones Home Fundraising - Volunteer Totals **Build Progress** Build at Risk / Issues Activities Final Build Report

Viewing/Editing - RFO:165 Affiliate:248580 Address: 375 S Reads Way

<-- Previous Next -->

Build Progress - Description	Planned	Completed	Status/Notes
Permits Pulled and Variances Approved:	3/1/2012	2/25/2012	
Groundbreaking / Wall Raising Ceremony:	4/1/2012	4/13/2012	
First Date Volunteers on Site:	4/7/2012		
Rough Plumbing, Electrical and HVAC Inspections Complete:	7/7/2012		
Construction Complete:	8/18/2012		
Dedication:	9/8/2012		

Print PSR... Save PSR Return to Selection Tab Close

Use this section to record notes that are helpful to you (e.g., Rain delay).

13. Click the **Build At Risk** tab.
14. Select Yes or No to answer the “Do any issues exist that could cause this build to not be completed?” question.
15. An Open Issue must be updated and closed when answering No.
16. Enter the expected date the issue will be resolved.

You must answer this question once per reporting period.

Click here to view closed issues.

Use these arrows to view all issues.

An Open Issue must be updated and closed when answering No.

17. Click the **Activities** tab.
18. Enter Date of Activity, Type, Description, # of Participants and Publicity information.

Tracks Year to Date totals.

Groundbreaking and Dedication activities will automatically populate here based on what is entered on Build Progress tab.

The Publicity Coordinator is prefilled, but can be updated as needed.

Date of Activity	Type of Activity	Activity Description	# Participants
2/3/2012	Coffee Hour	Information coffee hour at the local Lutheran Church.	217
3/31/2012	Fund-raiser	coin collections from the Sunday School kids at church near the house's location....just typin	7
3/31/2012	Fund-raiser		5
4/13/2012	Groundbreaking/Wall Raising (crea	375 S Reads Way	

19. Click the **Final Build Report** tab.
20. Enter Family Information and Actual Costs.
21. **Only when the house is 100% complete and all reporting is final** – Click the Completion and Dedication Dates Entered box. *Note: An error message will appear if information is still needed.*

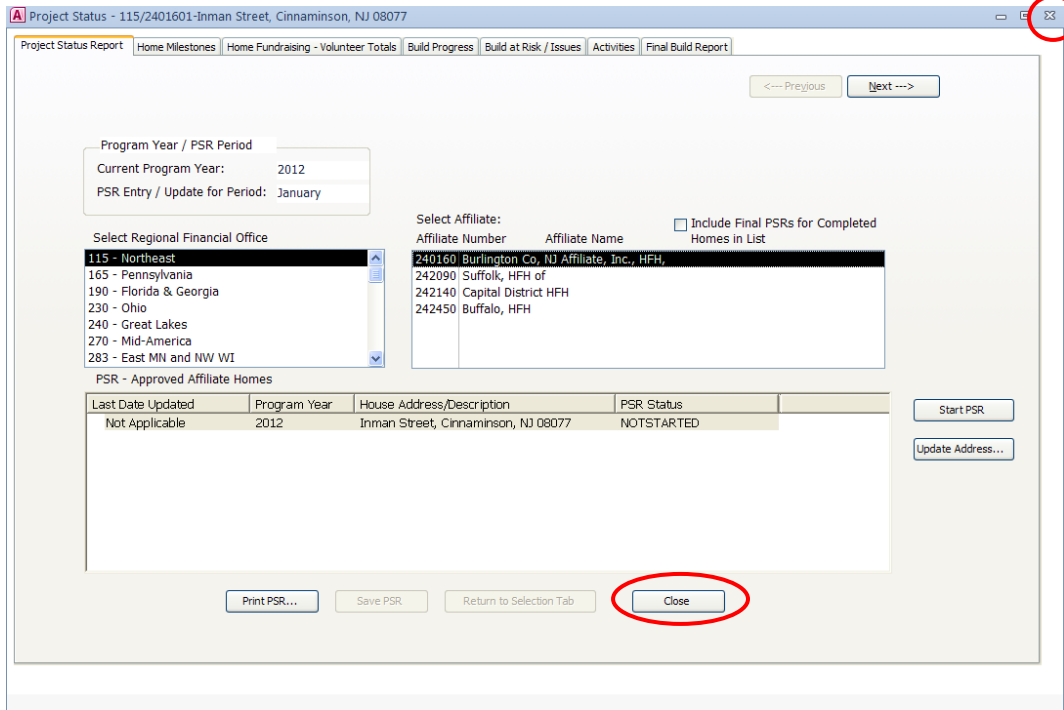
IMPORTANT:
Once this box is checked, you cannot make any additional changes to this PSR.

Accessing Reports

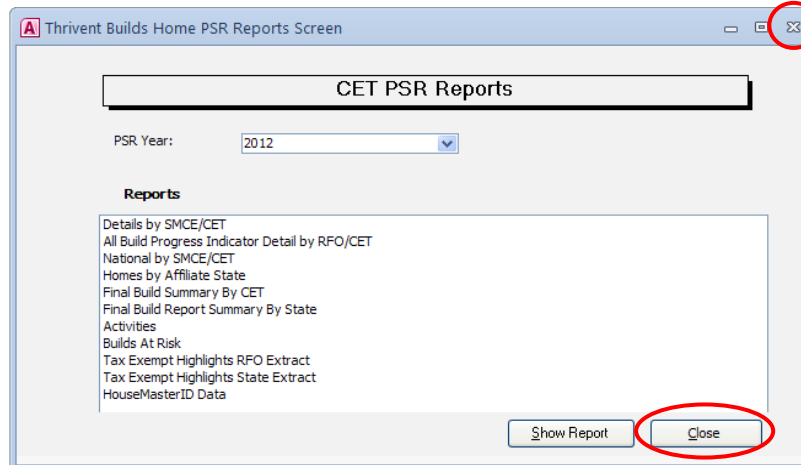
1. From the Thrivent Builds Database Main Menu, click **CET PSR Reports**.
2. Select the year and desired report, and click **Show Report** to view or print.

Closing the Database

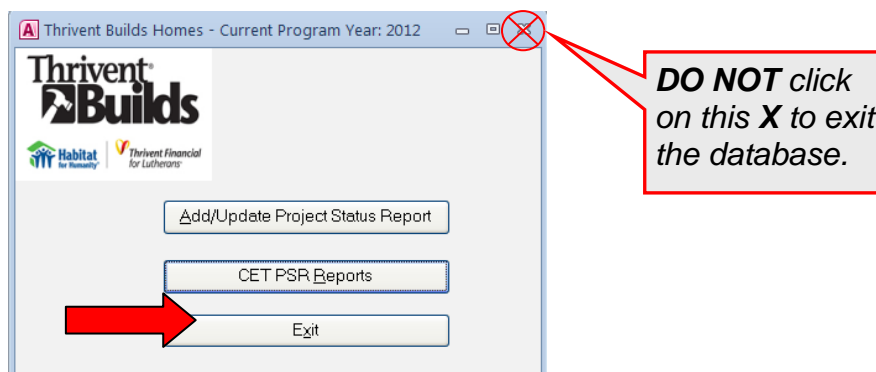
1. From the PSR screen, click **Close** at the bottom or **X** at the top right of the screen.



2. From the CET PSR Reports screen, click **Close** at the bottom or **X** at the top right of the reports screen.



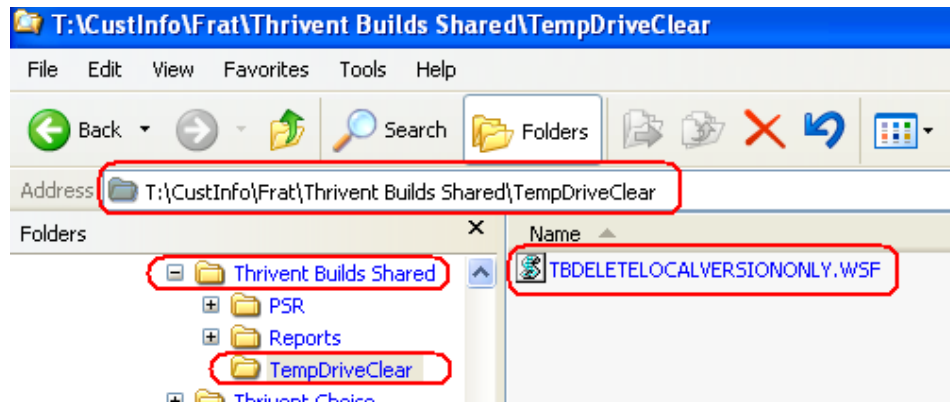
3. From the Thrivent Builds Database Main Menu, click **Exit** button to close the database.



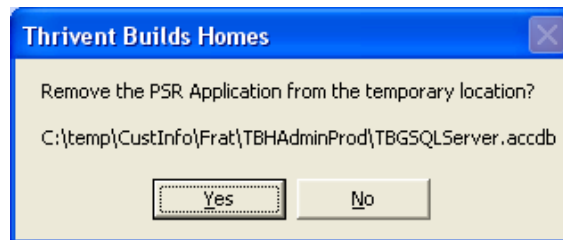
Error Opening the Database

If you experience an error opening the database, the local version of the database stored in the temporary folder on your C:\ drive must be deleted and refreshed.

1. Open **Windows Explorer** (Right-click on the Start button and select Explore) and navigate to the secured LAN drive: <T:\CustInfo\Frat\Thrivent Builds Shared\TempDriveClear>.



2. **Double-click** the file named **TBDELETELOCALVERSIONONLY**. When clicked, the script file searches for the existence of the TBHAdminProd system on your local C:\ drive. If found, the user is asked if they wish to remove it:



3. If you click **Yes**, the local copy is deleted from your C:\drive. If you click **No**, it does not.
4. If the TBHAdminProd system is not found on your local C:\ drive, this message displays:



5. After the local copy is deleted, **open** the Thrivent Builds database again following [Using the PSR](#) instructions on page 3.
6. If you are still unable to open the database, **email** [BOX Thrivent Builds Homes](#).