User Guide 2025: California Climate Investments Reporting Tracking System (CCIRTS)

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Overview

This document is meant to serve as a guide for agency program staff responsible for reporting on California Climate Investment (CCI) programs. Its purpose is to provide an overview of the California Climate Investments Reporting and Tracking System (CCIRTS), a centralized platform designed to enable administering agencies to submit CCI program and project information in a standardized manner.

The guide covers background information on CCI reporting requirements and structure, key terminology and definitions, detailed instructions on accessing, navigating, and utilizing CCIRTS, and additional relevant information. It aims to equip agency program staff with the necessary knowledge and resources to use the CCIRTS platform effectively.

User Guide Introduction

All agencies administering California Climate Investments (CCI) programs are required to track the implementation of awarded projects and report the outcomes. Outcome reporting requirements include greenhouse gas (GHG) reductions, co-benefits, and benefits to residents of disadvantaged communities, low-income communities, and low-income households (collectively referred to as "priority populations"). The California Air Resources Board (CARB) is responsible for developing guidance on reporting standards and requirements for all State agencies that receive appropriations from the Greenhouse Gas Reduction Fund (GGRF).[1]

CARB is also responsible for managing the CCI reporting infrastructure; to meet the need for a standard reporting process, CARB developed the *California Climate Investments Reporting and Tracking System (CCIRTS)*. This centralized, online platform allows administering agencies to submit project and program information and serves as a repository for all previously submitted information. Administering agencies are required to submit information once a year beginning in 2025, even if there is no new program or project-level data for the given reporting period.

The information that is submitted through CCIRTS is used in several different ways. Every year, the Department of Finance submits an Annual Report to the Legislature on the status and outcomes of CCI. Information from CCIRTS provides the Department of Finance with critical data needed to meet statutory reporting requirements. CCIRTS data is also made publicly available on the *California Climate Investments website* and through the *California Climate Investments Project Map*. The latter is an open-access online mapping tool that allows users to visually interact with project-specific project data such as funding amounts, GHG reductions, and co-benefits. The accessibility of this data supports state agency accountability and transparency to the public.

This User Guide was created by CARB staff as a resource for administering agency staff who are charged with managing CCI programs, and specifically those who are tasked with reporting on project implementation and outcomes. Additional resources include the Cap-and-Trade Auction Proceeds: Funding Guidelines for Agencies that Administer California Climate Investments *(Funding Guidelines)*, which provides detailed descriptions of reporting requirements, and the *California Climate Investments website*.

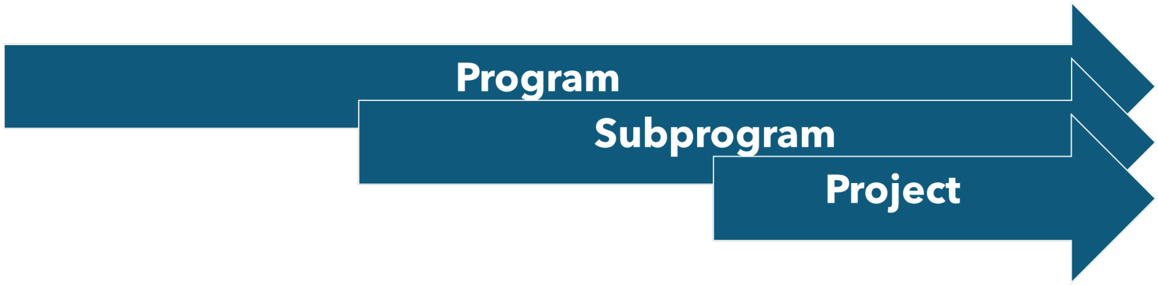
For specific questions or issues using CCIRTS, including data submission, please contact the program's CARB point of contact or *email the GGRF program*.

[1] Senate Bill 862, Chapter 36, Statutes of 2014, Government Code Section 16428.9(b).

Reporting Structure

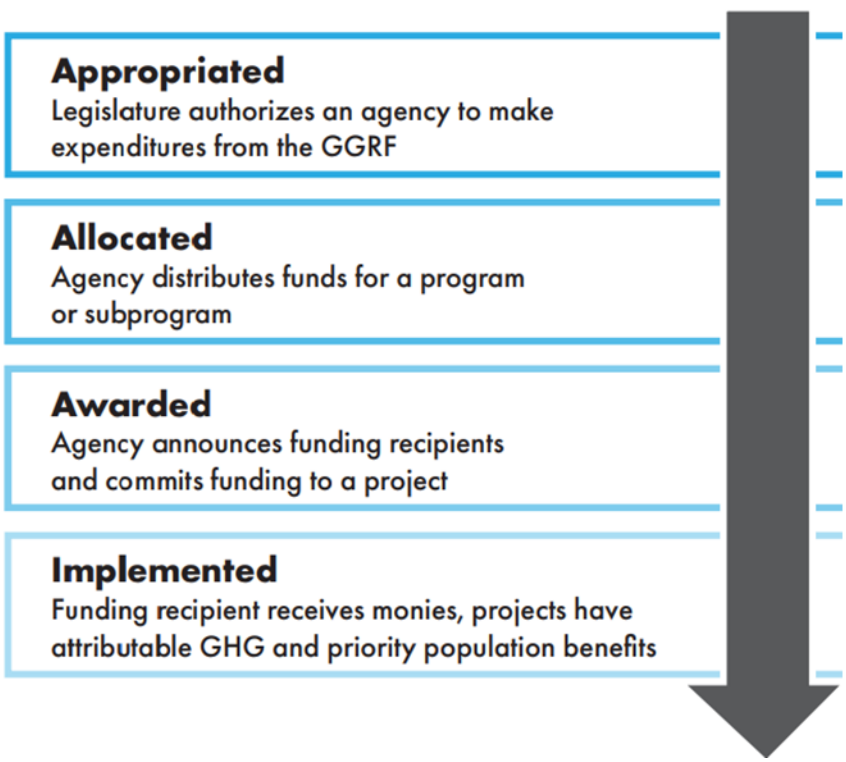
The reporting structure of CCIRTS is set up to collect information according to the hierarchy shown in Figure 1. Agencies report data at each of these levels.

Figure 1



Funds flow through the GGRF to projects in several steps, which vary across agencies. To provide a consistent approach for reporting funds and project benefits, California Climate Investments uses the following terms to describe how funds flow from the Legislature to recipients: appropriated, allocated, awarded, and implemented, as shown in Figure 2.

Figure 2



The Legislature appropriates CCI funding to agencies, as defined in Figure 1. Typically, the Legislature appropriates funds at the program level. Recipient agencies may then allocate appropriations to fund one or more subprogram. For example, CalRecycle allocates its Waste Diversion appropriation to four subprograms: the Organics and Recycling Manufacturing Loans Program; the Organics Grants Program; the Recycling Manufacturing Grants Program; and the Food Waste Prevention and Rescue Grant Program. On the other hand, for appropriations that fund programs directly, such as for the California Department of Transportation's (Caltrans) Low Carbon Transit Operations Program, the program and subprogram are the same.

Each reporting cycle (annually starting 2025), administering agencies will submit program-level data and project-level data. Program-level reporting covers two key areas: solicitations and public transparency and outreach events. Project-level reporting concerns the details of specific projects that were awarded for the current reporting cycle. To standardize and streamline the project-level reporting process, CARB provides project-level Excel templates for agency use. These are designed based on the reporting requirements described in the *Funding Guidelines*. All project-level Excel templates are available on the *CCI Quantification, Benefits, and Reporting Materials* page.

While project-level reporting Excel templates are customized to meet the needs of specific sub-programs, they follow a general structure. Figure 3 shows a flow diagram of the various project stages, beginning with awarded. Each of these stages have individual tabs within the reporting templates.[2]

Figure 3

Agencies will report project information on "Awarded" and "Implemented" stages in accordance with the definitions in the *Terminology section*, below. Administering agencies should not report a single project as awarded in more than one reporting cycle. If new funds are added to a previously existing project such that additional benefits will be created (i.e., new funds will enable further GHG emissions reductions), agencies will report these new funds as a new project with a distinct project ID. Some programs append new information to previous project IDs (i.e., "Amendment 1", "Amendment 2") for contracts that are repeatedly awarded funds. Report only the change in GHG emissions reductions and other co-benefits associated with the new increment of funding rather than the entire project.

Census tract-based project data, as defined in the *Terminology section*, may report a project as implemented in one or more reporting cycles after the initial award as needed.

[2] For projects where "awarded" and "implemented" occur at the same time, as in the case of census tract-based projects, these stages are combined on a single Excel tab.

Implemented project data in the same census tract may also be reported in multiple reporting cycles.

Agencies will report projects in the “Closeout” stage once at the conclusion of a project as either “Completed” or “Canceled.” Once operational, a subset of projects will be subject to “Project Outcome Reporting.” This may occur prior to “Closeout.”

Terminology

Definitions for terms that are specific to California Climate Investments (CCI) are provided below. Program-specific definitions are provided in the "Data Dictionary" tab of the project-level reporting Excel spreadsheets.

- **Priority populations** – Priority populations include residents of: (1) census tracts identified as disadvantaged by California Environmental Protection Agency per SB 535; (2) census tracts identified as low-income per AB 1550; or (3) a low-income household per AB 1550. CCI maintains a publicly available *map of all priority populations*.
- **Program Data** – Program data are focused on the operation of a program/subprogram, and include information on outreach and other public events, and the solicitation process.
- **Project Data** – Project data are information specific to a project implemented under a program/subprogram. As described previously, CARB provides "project-level Excel templates" (defined below) so that information is reported in a standardized way. Examples of information that is reported for each individual projects include funding amount, location, GHG emission reductions, and benefits to priority populations.
    - **Project-level Excel template** – For each subprogram, CARB staff provides a reporting template that includes all required and optional reporting fields. Reporting fields vary by project type. Agencies will assign each awarded project a unique project ID. Project IDs can contain only letters, numbers, spaces, and special characters dash and underscore ("-" and "_"). Administering agencies will upload completed spreadsheets in the CCIRTS environment. More information can be found in *Step 2* of the *Data Entry section*.
    - **Data Dictionary** – All project-level Excel templates include a "data dictionary" tab. This tab provides guidance on terms used for program reporting, defines project-level data input fields, and details the type and format of information requested for each field. These definitions are specific to each subprogram.
- **Awarded Projects** – Funds are considered "awarded" when an agency commits funding to a project (e.g., through contract execution or funds transferred to a third-party administrator).
- **Implemented Projects** – Funds are considered "implemented" once they have been obligated to the final funding recipient and the project has quantifiable benefits. Oftentimes, benefits (e.g., GHG reductions, benefits to priority populations, water savings) are known at the outset of a project because they are estimated using CARB-

designed calculator tools[3]. This is always the case for programs that award funds on a competitive basis, such as the CAL FIRE Forest Health Program and the Department of Fish and Wildlife Wetland and Watershed Restoration Program. In these cases, benefits are considered quantifiable and are thus considered implemented upon award. It is important to understand that the term “implemented” in this context does not indicate that all project activities have been executed, but rather that the benefits of the project are known and can be reported. For other programs, such as CARB’s Clean Vehicle Rebate Program, funds may be awarded to a third-party administrator, but not implemented until the voucher recipient is known, and benefits can be attributed to a specific location.

- **Canceled Projects** – Periodically, projects that have been awarded or implemented are canceled. These canceled projects should be reported in the “closeout” tab of the Excel spreadsheet.
- **Census tract-based Projects** – Census tract-based projects are those that occur in individual households. CARB does not collect information at the household level, so information about these types of projects must be aggregated by census tract prior to reporting. Examples of census tract-based projects include those implemented under CARB’s Clean Vehicle Rebate Project (CVRP) and the Department of Community Services and Development’s (CSD) Low Income Weatherization Program. For census tract-based projects, “awarded” will occur prior to “implemented,” as location information is not known until the voucher / upgrade has been distributed /installed.
- **Reporting Cycle** - Administering agencies submit data by annual reporting cycle. Reporting occurs on an annual basis starting 2025. This is a change from prior reporting years, with 2024 and older years being semi-annual. The 2025 and beyond reporting period covers activities occurring from November 1 through October 31.
- **Fiscal year(s)** - Fiscal year(s) refer to the fiscal year(s) in which funds that are used to fund a project were appropriated to the agency and are reported only at the project level. A single project may receive funds that were appropriated over multiple fiscal years.

Refer to the “Data Dictionary” tab on project-level Excel templates for subprogram-specific definitions. For more information on overarching reporting principles and requirements, please refer to Volume 3 of the *Funding Guidelines*.

[3] Calculators tools can be downloaded from the *CCI Quantification, Benefits, and Reporting Materials* page

CCIRTS Environment

The following subsections provides instructions on accessing CCIRTS (*section I*), setting up new CCIRTS user accounts (*section II*), and navigating the CCIRTS environment (*section III*). Additionally, *section IV* provides detailed guidance on the data entry process, and information on how to correctly input and upload data into CCIRTS. In many cases, step-by-step instructions on how to execute specific actions are provided. CARB also developed counterpart *how-to-videos that can be found here*.

I. Accessing CCIRTS

CCIRTS can be accessed here.

CCIRTS is compatible with the following web browsers: Edge, Explorer, Firefox, Safari, Chrome, and Opera. Users can access CCIRTS anytime, excluding periodic maintenance. These maintenance periods will be scheduled in advance and users will be notified.

II. Registering as a New User

Each agency representative will have unique credentials to log into CCIRTS with. All new agency users are required to register as new users.

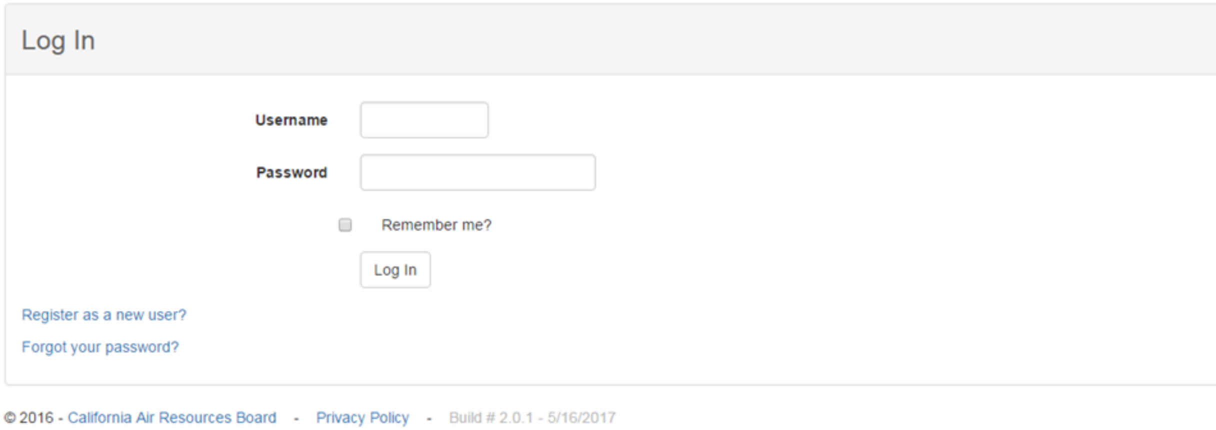
Agencies may designate multiple people with authority to enter and submit data. User accounts are authorized at the subprogram level. Multiple users may access and enter data for a single subprogram. Users that oversee multiple subprograms will be given access to each appropriate subprogram through a single user account. Agency users are encouraged to coordinate to provide a complete program submittal. Accounts will only be approved for users that are confirmed to be authorized agency representatives.

The three-step process for user registration is described below:

1. Complete registration request form on the login page under "Register as New User."
2. System will send an email to validate users email address. Click on link in email within 30 minutes.
3. Wait for a second email titled "Welcome New User", stating that request was approved.

Account registration begins by selecting the "Register as a new user?" link from the login page, shown in Figure 4.

Figure 4



Detailed instructions for each of these steps are described below.

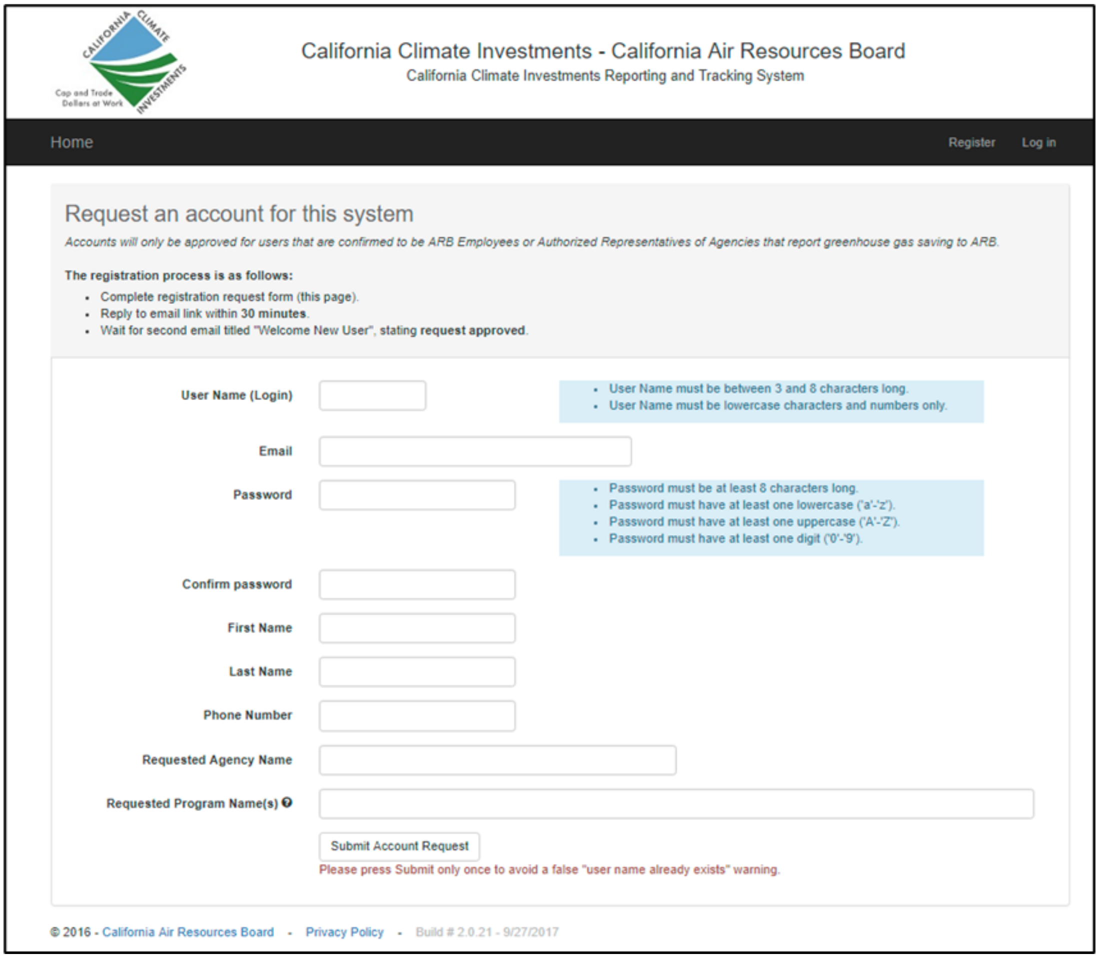
Step 1. Selecting the "Register as a new user?" link will display the registration form as shown in Figure 5. The following fields are required when requesting an account:

- **User Name** (login ID) must be:
  - 3 to 8 characters long
  - Lowercase characters and numbers only
- **Email** - Enter a valid email address.
- **Password** - Passwords must:
  - Be at least 8 characters long
  - Include at least one lowercase letter ('a'-'z').
  - Include at least one uppercase letter ('A'-'Z').
  - Include at least one digit ('0'-'9').
- **Name**
- **Business Phone Number** - Enter a business contact phone number in the event CARB staff needs to contact you.
- **Requesting Agency Name** - Enter the name of the agency for which you are entering reporting data.
- **Requested Program Name(s)** - Enter the programs and subprograms for which you are requesting permission.

Step 2. When complete, click the "Submit Account Request" button. If there is an error in the data registration process, the system will display a message directing the user to adjust the error. Once successfully submitted, the user will be asked to validate the account via email. In the event an email is not received, please check the email was not re-directed to a junk or spam folder.

Step 3. Once validated, your request for account access will be sent to CARB staff that will confirm your request and assign your role as an agency user. Approved users will receive a second email that will allow access to CCIRTS.

Figure 5



III. Dashboard: The CCIRTS System Home Screen

The Dashboard is a post-login landing page that guides users through the data submittal process, shown in Figure 6. The top bar is always visible and includes a "Home" button to return to the Dashboard at any time. The "About" tab includes user resources including links to web pages for reference, this User Guide, and contact information. The Dashboard includes the following links and resources for agencies:

- **Data Entry** – Takes the user to the main reporting page for agency tracking.
- **Data Archives** – Takes users to an archive of previously reported data from past reporting cycles.
- **Program Descriptions** – Describes the programs for which the user is registered.

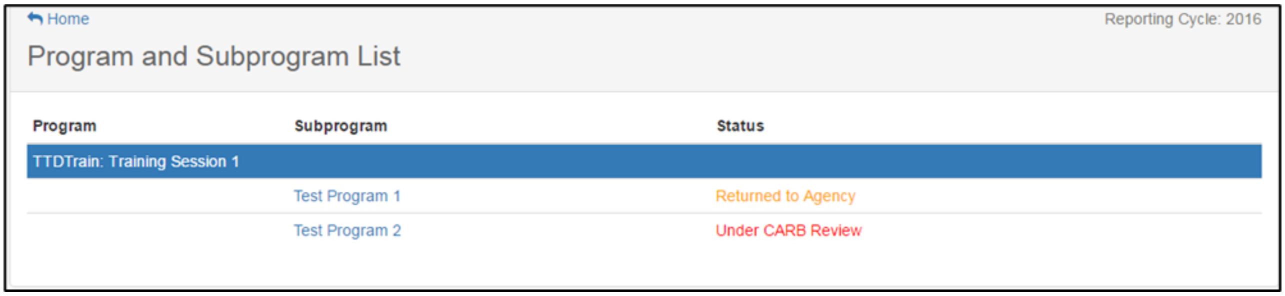
Figure 6

IV. Data Entry and Submission Process

As described in previous sections, CCIRTS was created to be a centralized platform for agencies to report information at both the program and project level. Figure 7 shows the data submittal process; as indicated in this figure, CARB staff will work with agencies during each reporting period to ensure that data submitted through CCIRTS is complete and accurate. Once approved, the new information is entered into a comprehensive database for use in public reports.

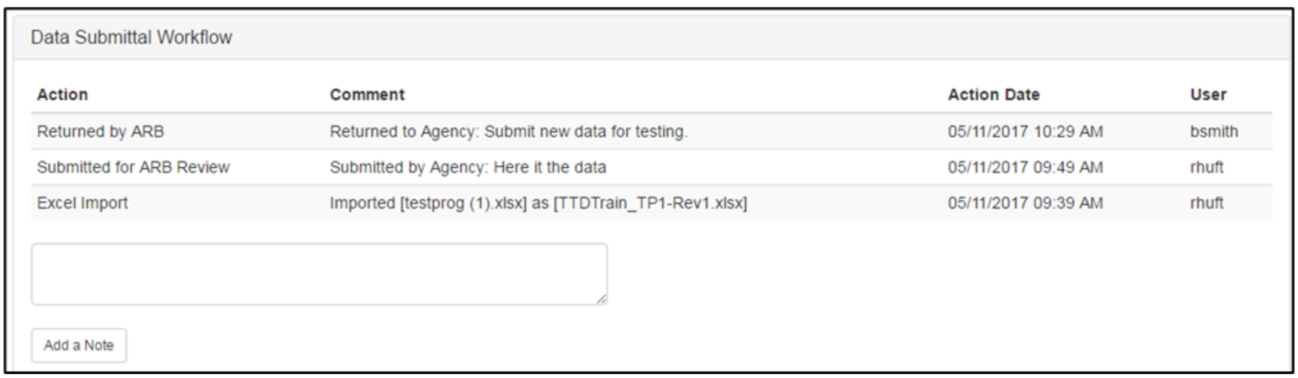
The “Data Entry” link on the CCIRTS Dashboard (Figure 6) will navigate the user to a “Program and Subprogram List” page. An example of this page is shown in Figure 7. This page includes all programs and subprograms that are applicable the agency user. The column on the right side shows the reporting status for each subprogram; these include “Awaiting Agency Submittal;” “Under CARB Review;” “Returned to Agency;” and “Approved.” Please note that the “Approved” status indicates preliminary approval by CARB staff and does not indicate final approval for data publishing. In the event errors were discovered in approved data, CARB may need to correct data and the status of the submittal will display as “CARB Edit.” Agency users will be notified if the status of the submittal is changed.

Figure 7



To enter, edit, or review data, select the appropriate subprogram from the list. This will navigate the user to a "Subprogram Data Sections" page. As shown in Figure 8, the topmost data entry box is titled "Data Submittal Workflow," and displays a change log of agency and CARB user activity. Data submittals, revisions, and comments are tracked here, with the most recent activity displayed at the top. A change log is also included on individual data entry screens, such as the "Solicitation Process" page (see *Step 1*).

Figure 8



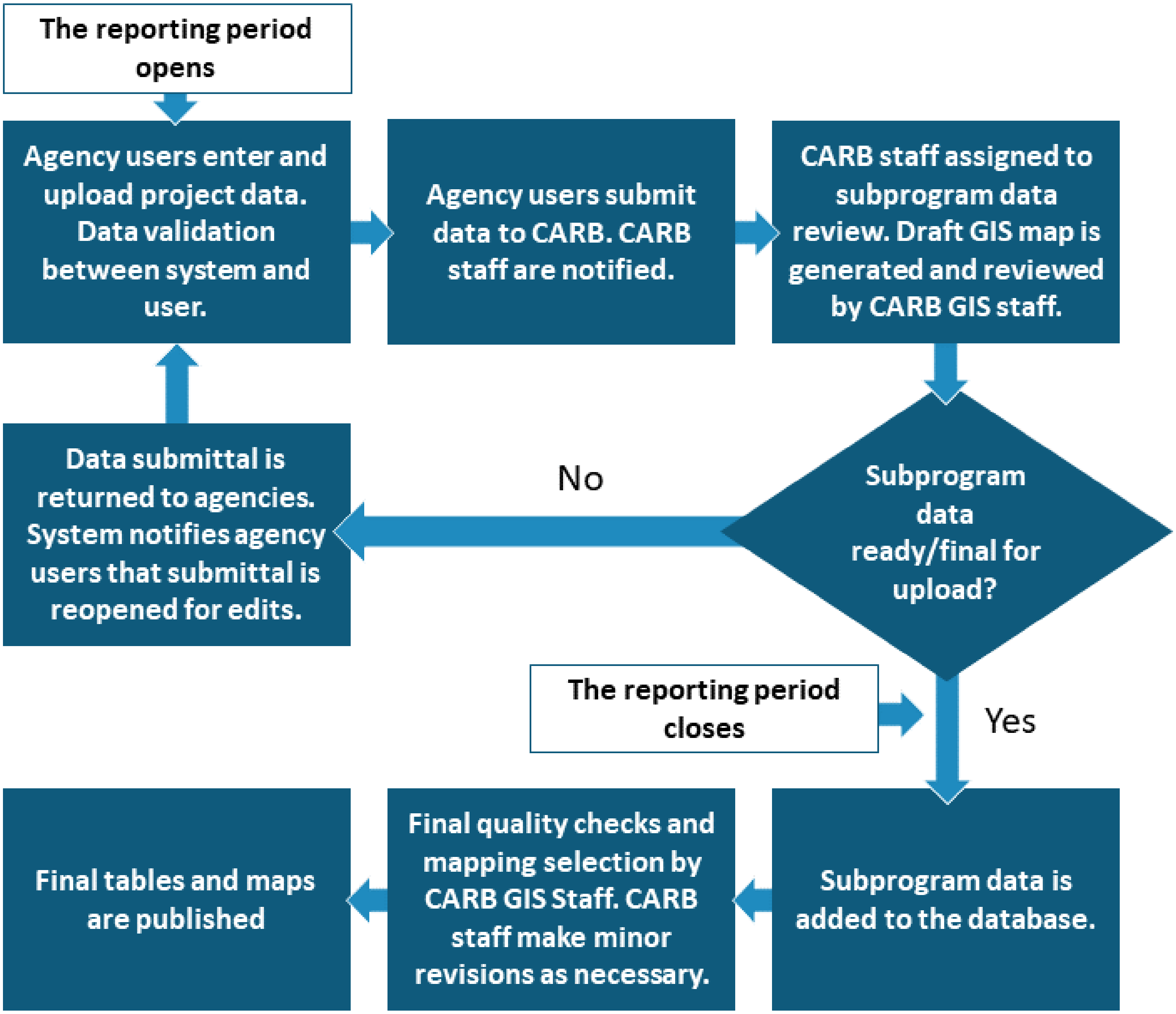
The data entry boxes below "Data Submittal Workflow" represent the six steps for submitting data:

1. Program Data – Submit program and sub-program data through web forms.
2. Project Data – Upload populated project-level Excel templates.
3. Supplemental Location Data – Upload supplemental location data. This step is only applicable for projects with location data not represented by points.
4. Optional Supporting Documentation – Upload optional supporting information.
5. Review Data Summary – Review a summary of entered data.
6. Submit Completed Data to CARB

The following sections detail each of these steps. Please note that:

- Section entries and uploads are automatically saved as users enter data.
- Agency users without new program, subprogram, or project data may skip to Step 6 and select the "Nothing to Report this Period" button to verify that the agency does not intend to submit any updated data during this period.

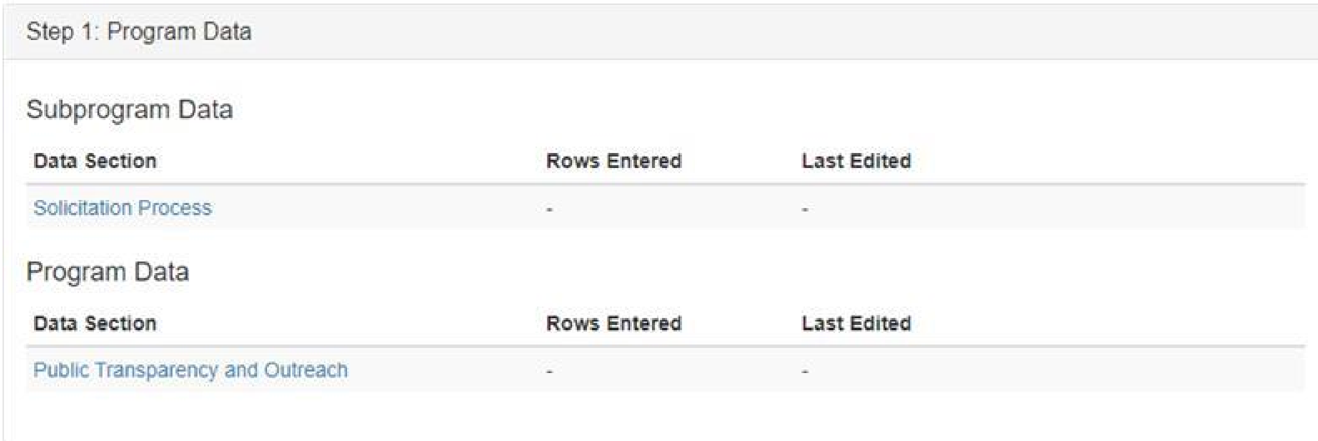
Figure 9



Step 1: Program Data

Step 1 covers information at the sub-program and program level. The data entry box for this step is shown in Figure 10.

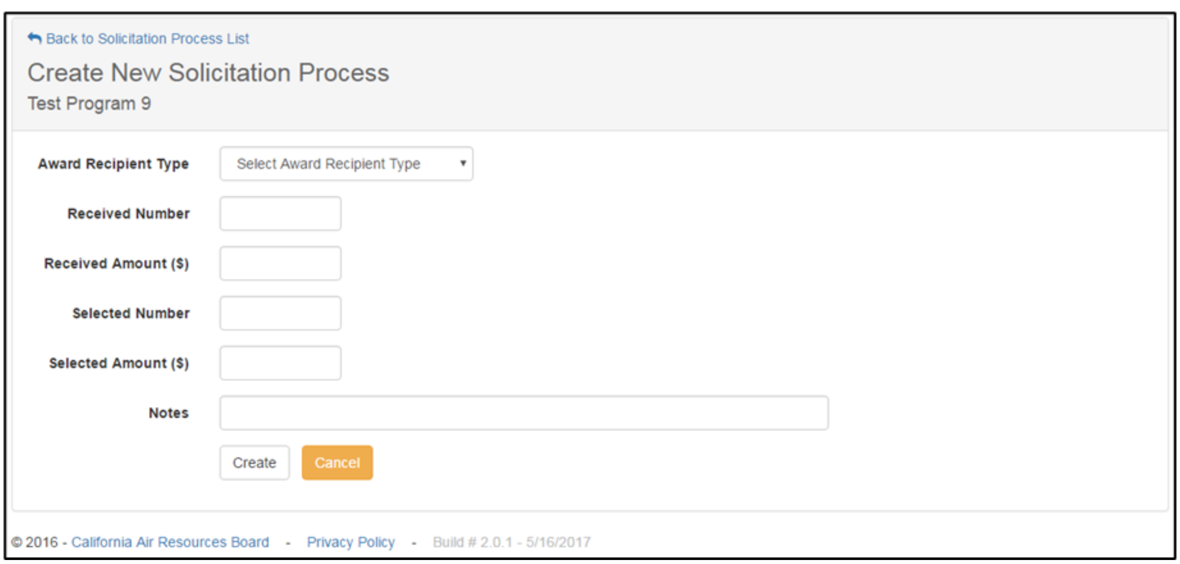
Figure 10



Subprogram Data – Solicitation Process

The subprogram data section covers information on the solicitation process for competitive subprograms. If your agency solicited or awarded funding to projects during the current reporting cycle, then select the "Solicitation Process" link shown in Figure 11. This will navigate the user to a "Solicitation Process" page where there is an option to enter new data by selecting "Create New." This button links to the "Create New Solicitation Process" data entry screen shown in Figure 11.

Figure 11



The following information is required:

- **Award Recipient Type** – Select from a drop down "Awarded Directly to Recipient" if funds are distributed from the administering agency to the final funding recipient or "Awarded to an Intermediary" if funds are first issued to a third party for distribution (e.g., rebate program)

- **Received Number** – Enter the total number of applications received
- **Received Amount ($)** – Enter the total amount of funds requested
- **Selected Number** – Enter the total number of applications selected
- **Selected Amount** – Enter the total amount of funds associated with selected applications

Agency users also have the option to leave additional comments in the "Notes" field, but this is not a requirement.

Program Data – Public Transparency and Outreach

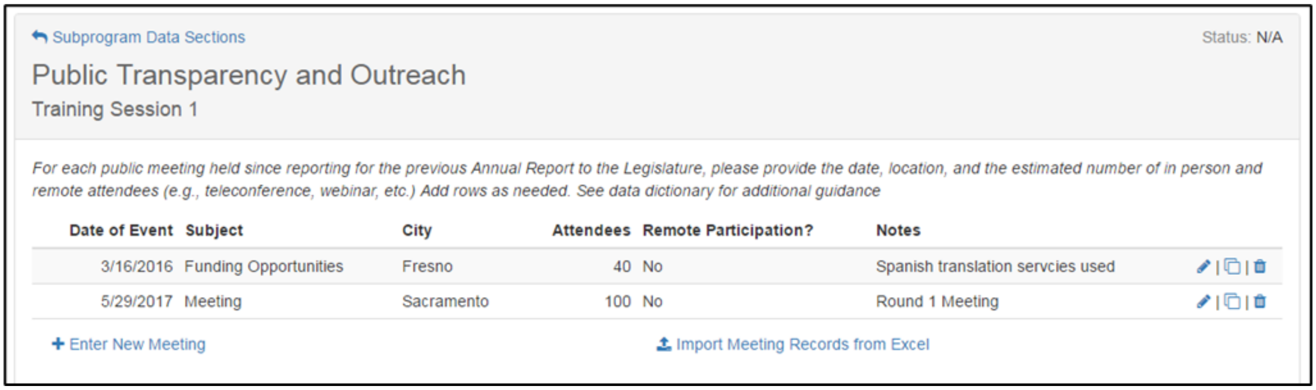
The program data section covers information on all public events that were held since the previous reporting cycle. Where and when possible, agency users should report on all events that were hosted by applicable contractors, grantees, community organizations, and other agencies. Examples of events that should be included are workshops and outreach events intended to raise awareness of the program, forums for public or stakeholder input, and events aimed at increasing program participation.

Clicking the "Public Transparency and Outreach" link will navigate the user to the data entry screen in shown in Figure 12. For each event, the following information is required:

- **Date of event**
- **Subject** – Describe the information or topics that were covered during the event, or the list the name of the presentation that was shared
- **City** – Enter the name of the city where the event was held. If the event was held remotely, then enter the word "Remote"
- **Attendees** – Enter the estimated total number of attendees, including both remote and in-person participants
- **Remote participation** – Indicate whether some attendees participated remotely ("Yes" or "No")

Agency users also have the option to enter additional comments in the "Notes" field, but this is not a requirement.

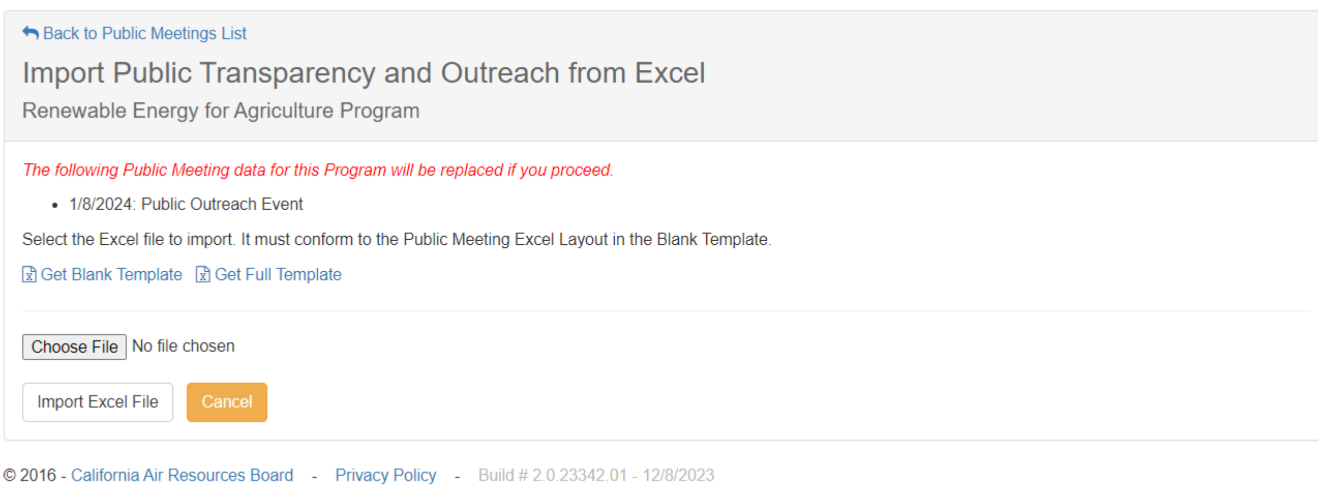
Figure 12



Event information may be entered directly in the tool using the “Enter New Meeting” link as shown in Figure 12. Selecting the middle icon “clone” button on the right-hand side will pre-populate a new meeting entry with the selected meeting information.

Alternatively, event information may be uploaded from an Excel document by selecting “Import Meeting Records from Excel” as shown in Figure 13. Select “Get Blank Template” to download a template with blank input fields, as shown in Figure 13. Select “Get Full Template” to download an Excel document populated with the data that have already been entered. If validation errors occur while uploading, **work in the Excel document directly** to correct these errors before attempting to upload again.

Figure 13



Additionally, please note the following:

- If using the “Import Meeting Records from Excel” feature, include all meetings for that program, even if meetings focused only on a specific subprogram. As mentioned above, the public meetings data are shared across subprograms and aggregated at a program level. Regardless of which subprogram is chosen when uploading the Excel file, the meetings will be reflected across all subprograms that comprise a program.

- **Excel uploads will replace data that have been manually uploaded.** Uploading only a subset of meetings with the Excel import feature may erase existing data on other subprograms. For this reason, append existing relevant data using the "Get Full Template" feature and coordinate with other program agency users. Once templates have been uploaded, additional meetings may be added manually.
- The intent of the public transparency and outreach reporting section is to document all previously held meetings and events for the current reporting cycle. Though it is not required as a part of reporting, agency staff are encouraged to communicate the details of all upcoming meetings and events to CARB program managers. California Climate Investments regularly updates an event calendar. Coordinating with CARB staff ensures that important events are added to *this calendar*.

Step 2: Project Data

In Step 2, agency users will upload completed project-level Excel templates with all applicable project data for the current reporting cycle. The data entry box for this step will display a history of uploads; an example of this is shown in Figure 14. The most recently uploaded file will be highlighted in yellow. Each line entry includes the date the file was uploaded, the user that uploaded the file, and notes on the submittal. The blue icon with a downward-facing arrow on the far right-hand side can be used to download the file. Additionally, a map icon will appear for files with no zero validation errors. See Figure 16 for more information on what this preview button does.

Agency users can download blank project-level Excel templates their specific subprogram(s) two ways: by clicking the 'Download Excel Template" link in the bottom corner of the "Step 2: Project Data" box or by visiting the *CCI Quantification, Benefits, and Reporting Materials* page.

Figure 14

Step 2: Project Data

File Name	Uploaded	User	Note
BCDC_BRP_2023 Mid-Year Update-Rev3.xlsx	07/25/2023 10:42 AM	rhuft	Fixed CES version to 3 instead of "No" [BCDC_BRP_2023 Mid-Year Update-Rev3.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
BCDC_BRP_2023 Mid-Year Update-Rev2.xlsx	07/06/2023 01:57 PM	bcdc	[3820_BCDC_GGRF_2022.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
BCDC_BRP_2023 Mid-Year Update-Rev1.xlsx	06/30/2023 03:58 PM	bcdc	[3820_BCDC_GGRF_2022.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
3820_BCDC_GGRF_2022.xlsx	06/30/2023 03:55 PM	bcdc	[3820_BCDC_GGRF_2022.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
3820_BCDC_GGRF_2022.xlsx	06/30/2023 03:51 PM	bcdc	[3820_BCDC_GGRF_2022.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
3820_BCDC_GGRF_2022.xlsx	06/30/2023 03:38 PM	bcdc	[3820_BCDC_GGRF_2022.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
3820_BCDC_GGRF_2022.xlsx	06/30/2023 03:34 PM	bcdc	[3820_BCDC_GGRF_2022.xlsx] [AwardedImplemented:11 Rows] [Closeout:0 Rows] [Jobs:0 Rows]
BCDC_BRP_2022.xlsx	06/30/2023 03:19 PM	basmith	[BCDC_BRP_2022.xlsx] [AwardedImplemented:11 Rows]
BCDC_BRP_2022.xlsx	06/30/2023 01:46 PM	bcdc	[BCDC_BRP_2022.xlsx] [AwardedImplemented:11 Rows]

Download Excel Template

Using the Project-Level Excel Template

Though reporting templates are customized to suit the needs of the subprogram(s) they were designed for, they all follow a standard format. All templates contain a "Read Me" tab and a "Data Dictionary" tab. The former provides an overview of how to use the template, and the latter defines column headers for the other tabs.

The project-level Excel templates cover information for "Awarded," "Implemented," and "Closeout" project stages. Some subprograms have distinct "Awarded" and "Implemented" phases. An example of this is a subprogram that awards funds to a contractor, that subsequently implements a voucher program. For these subprograms, project reporting templates feature separate "Awarded" and "Implemented" tabs. For subprograms in which each project has accountable benefits (location, funding amount, GHG estimates), "Awarded" and "Implemented" often occur simultaneously and project-reporting templates have a single "AwardedImplemented" tab. Whether separate or combined, these tabs cover information on project administration (e.g., funding recipient, project location, project activities, and project duration), project funding, project benefits (e.g., GHG estimates, co-benefits), and benefits to priority populations. The "Closeout" tab provides a space to indicate which projects are complete or which projects have been cancelled; this tab may remain blank if all projects for the current reporting cycle are still in progress.

All templates also include a "Jobs" and "Outcome" tab. More information on each of these reporting areas is included below. Similar to the "Closeout" tab, these tabs may remain blank depending on which stage projects are in.

Though a description of all required data fields for each of the subprogram-specific templates is outside the scope of this user guide, below are some notes on data fields and reporting topics that are applicable for all subprograms.**Project IDs** – Created by administering agencies and can contain only letters, numbers, spaces, and special characters dash and underscore ("-" and "_"). Each project must have a unique ID.

- **Job Reporting** – CCI requires that jobs be reported two different ways. Agency users will use the CARB Jobs Modeling tool, located on the *CCI Co-Benefits Assessment Methodologies*, to estimate "Direct Jobs," "Indirect Jobs," and "Induced Jobs" and enter this information into "Awarded" and "Implemented" tabs (or the "AwardedImplemented" tab). Additionally, agency users will complete the "Jobs" tab to report on actual jobs and job training that directly supported by projects once this data becomes available.
- **Priority Population Reporting** – Priority populations include Disadvantaged Communities (DAC) and low-income communities and households. The California Environmental Protection Agency is responsible for identifying disadvantaged communities and does so through *CalEnviroScreen*. Please note that Disadvantaged Community designations have changed over the years, and agency users must identify the version of CalEnviroScreen (i.e., 2.0, 3.0, 4.0) that was applicable at the time the project was awarded. This field is included on "Awarded' and "AwardedImplemented" tabs of project templates.

  In reporting projects that benefit priority populations, the templates have columns asking administering agencies to either "Select a Priority Population" or "Claim" a benefit to a particular population. These columns are necessary because each project or voucher can only be counted once toward contributing to AB 1550 targets and some locations can qualify toward more than one priority population (such as a community that is both low income and disadvantaged).
- **Outcome Reporting** – Outcome reporting requirements are specific to subprograms and should be reported wherever data is readily available. On the "Outcome" tab of each reporting template, there are more detailed instructions on the type of information, frequency of data collection, and other reporting requirements for the subprogram.
- **Intermediary Administrative Expenses.** In addition to costs incurred directly by the State, administering agencies may provide funding to program administrators or intermediaries that use part of the funding to cover the administrative costs associated with distributing incentives, implementing projects, or tracking and reporting data. Definitions of intermediary administrative expenses can be found in the "Data Dictionary" tab of the project-specific Excel templates.

  For agencies that implement projects using an intermediary party, administrative expenses must be reported on a subprogram level. The Intermediary Administrative Expenses should be reported as a line item in the reporting template for the reporting cycle when the final costs for administration are known.

For agencies that only distribute funds direct to the final funding recipient, this does not need to be reported.

To enter data on intermediary administrative expenses in the reporting template, create a new line item and fill out the columns for the agency and Project ID, which should match the Project ID entered for the corresponding award entered in the Awarded tab (note that this could be from the current reporting period or a previous one.) Then indicate "yes" in the "Intermediary Administrative Expense (Yes/No)" field and enter the location of the office where the intermediary expense(s) was incurred if the field for latitude/longitude or census tract is present. These Intermediary Administrative Expenses cannot be claimed as providing GHG emission reductions or benefits to priority populations. As such, enter '0' for GHG reductions.

Provide the dollar amount of expenses incurred within the reporting cycle for administrative or overhead costs by an intermediary funding recipient (e.g., grantee, third-party administrator, local agency). For agencies contracting with an intermediary, this may correspond to individually invoiced items considered "administrative fees" or "processing fees." For agencies that distribute funds outside of a legal agreement, this will be any amount of funds not spent directly on project costs.

Please note that costs incurred by the administering agency to administer the program or subprogram, including costs incurred by partner State agencies that participate in administering the program or subprogram are tracked using the GGRF Administrative System for fiscal tracking. These costs do not need to be entered by the agency user.

Uploading the Template

If the Excel template includes invalid entries, the tool will return error messages through the upload process. If the tool returns errors, users will need to correct and re-upload the entire file. Work in the Excel document directly to correct these errors before attempting to upload again. When making corrections to the spreadsheet, please refer to the "Data Dictionary" tab in the project-level Excel template for the requirements specific to each reporting field.

The number of error messages displayed is limited by data processing constraints. The error messages will be returned for the first several hundred instances. As errors are corrected, additional error messages may be visible. A complete list of errors can be downloaded as an Excel sheet by clicking the "Save List to File" link as shown in Figure 15. Using Excel, users can view the error list sheet side-by-side with the project-level Excel template to make corrections.

Figure 15

Once the Excel document is without validation errors, the user can view a preview map of all projects[4] with a counterpart summary of data by clicking the map icon on the far right-hand side of the entry line (refer back to Figure 14). This button will navigate the user to a "Preliminary Statistics and Locations" screen; an example is shown in Figure 16. Note that statistics are based on summations of data contained in the uploaded reporting template. While these draft data may not reflect the finalized data used in public reporting, agency users are encouraged to use this function for data quality assurance purposes. Summary statistics include awarded and implemented funds, estimated GHG reductions, and benefits to priority populations. Place markers on the map are color-coded based on priority population benefit claims.

[4] A map will not be generated for census tract-based projects.

Figure 16

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Preliminary Summary Statistics and Locations

Dairy Digester Research and Development Program: CDFA_DDRDP_2023 Mid-Year Update-Rev3.xlsx

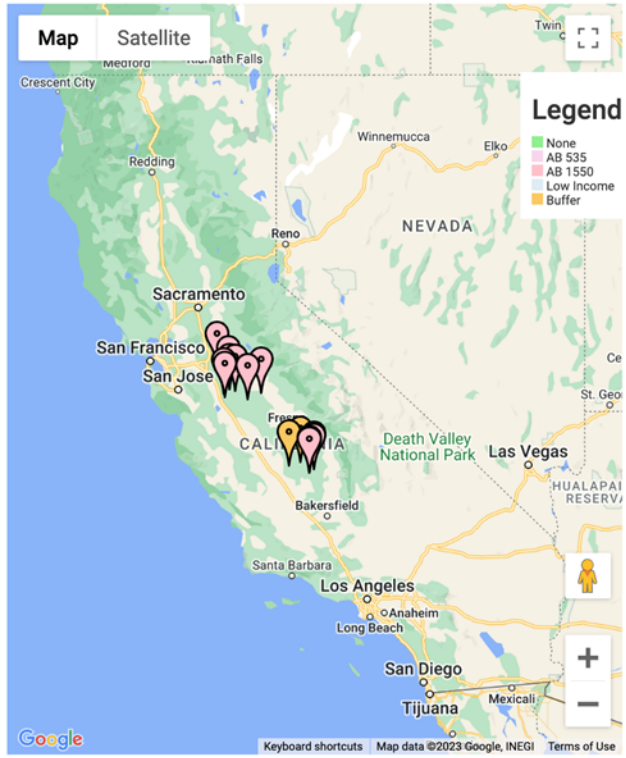
Note: these preliminary summary statistics represent draft data that has not been approved.

Upload Successful

Subprogram	DDRDP
Awarded Projects	14
Total GGRF Funding Awarded	$10,112,352
Awarded Stage GHG Emission Reductions	1,931,835
Implemented Stage GHG Emission Reductions:	0
Implemented Projects	14
Total GGRF Funding Implemented	$10,112,352.00

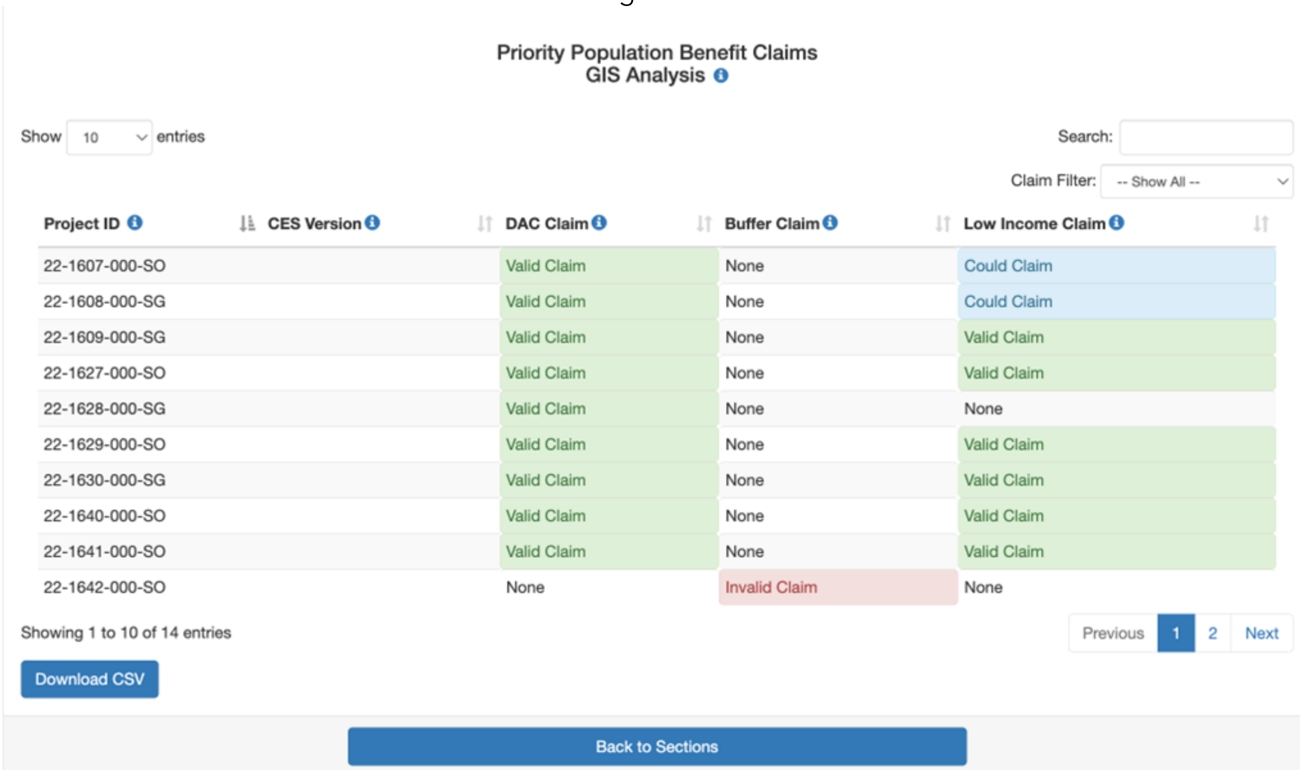
CES 3.0/4.0 (AB 1550)	Project Count	GGRF Funding	Percent of Implemented Funds
Located In and Benefiting Disadvantaged Communities	11	$8,512,352	84.18%
Located In and Benefiting Low-Income Communities or Households	0	$0	0.00%
In Low-Income Communities or Households within the 1/2 mile Buffer	2	$1,600,000	15.82%
Total	13	$10,112,352	100.00%

Low-Income Households	Project Count	GGRF Funding
Low-Income Households Statewide Irrespective of Claim	0	$0



The "Preliminary Statistics and Locations" screen also includes a spatial analysis tool to determine the validity of priority population claims. Beneath the summary statistics and map is a table labeled "Priority Population Benefit Claims GIS Analysis," as shown in Figure 16. This table provides a summary of whether DAC Claims, Buffer Claims, and Low-income Claims reported in Excel templates were found to be valid, for each project. Hovering over the "i" next to each column header will provide a brief description of the data field for that column. Note that this tool cannot determine validity of .KMZ supplemental location data uploads until after that upload has been accepted by CCIRTS (see *Step 3*).

Figure 17


Priority Population Benefit Claims
GIS Analysis

Show 10 entries

Search:

Claim Filter: -- Show All --

Project ID	CES Version	DAC Claim	Buffer Claim	Low Income Claim
22-1607-000-SO		Valid Claim	None	Could Claim
22-1608-000-SG		Valid Claim	None	Could Claim
22-1609-000-SG		Valid Claim	None	Valid Claim
22-1627-000-SO		Valid Claim	None	Valid Claim
22-1628-000-SG		Valid Claim	None	None
22-1629-000-SO		Valid Claim	None	Valid Claim
22-1630-000-SG		Valid Claim	None	Valid Claim
22-1640-000-SO		Valid Claim	None	Valid Claim
22-1641-000-SO		Valid Claim	None	Valid Claim
22-1642-000-SO		None	Invalid Claim	None

Showing 1 to 10 of 14 entries

Previous 1 2 Next

Download CSV

Back to Sections

Users can navigate back to the "Subprogram Data Sections" screen by clicking "Back to Sections."

Step 3: Supplemental Location Data

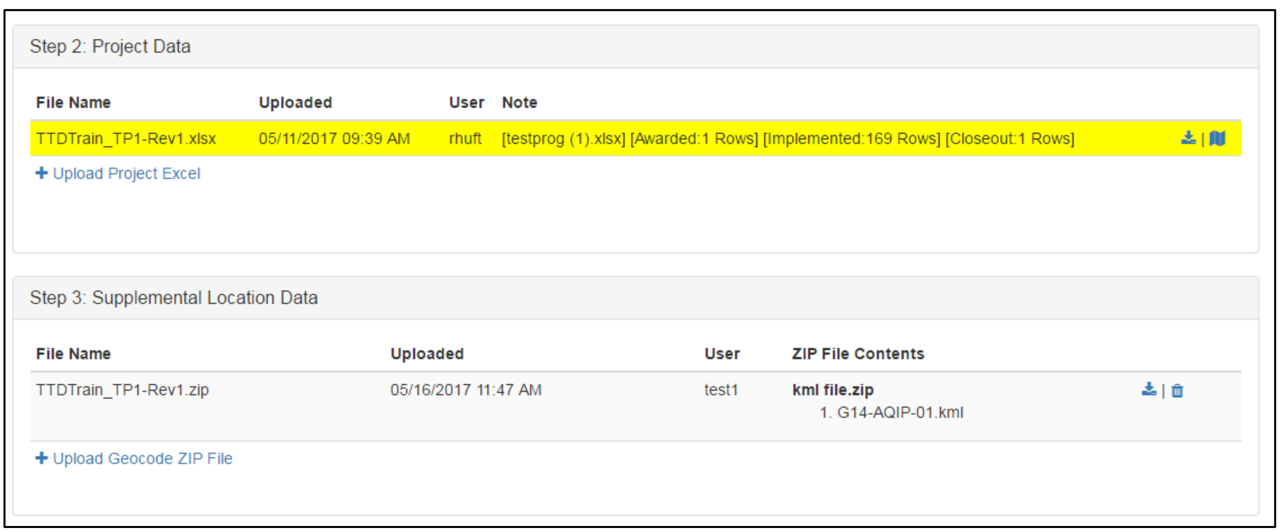
This step is applicable only for projects with location data that are not represented by a single point. Most projects can be reported using a single or several location coordinates or addresses. The location of these point-based projects is reported as a part of *Step 2* in the project-level Excel template. Other projects occur in a single location but are aggregated on a census tract basis. These census tract-based projects are also captured in *Step 2*. For projects that are best represented by many (e.g., dozens to hundreds) points, please contact CARB staff for a supplemental reporting template.

For projects that are area based or are best represented with a line or polygon, agency users will upload a geographic data file for each project. This file must be uploaded as a zipped file (.zip) containing individual .KMZ files with all project location data for the current reporting cycle. Each project must be in a separate .KML or .KMZ file within this .ZIP file, and each .KML or .KMZ file must be named after the project ID of the applicable project. CCIRTS will only accept files that are an exact name match for project IDs contained in project-level Excel templates, uploaded in *Step 2*. Figure 21 shows an unsuccessful upload where .KML or .KMZ file names are not associated with an awarded project ID.

Figure 18

If errors are returned upon uploading supplemental location data files, the user will need to correct errors and re-upload the entire file. Successfully uploaded files will be display as shown in Figure 19.

Figure 19



Several tools exist to create .KML files. Agency users may have these resources available through geographic information system (GIS) software. Free, web-based tools also exist that allow users to create geospatial files, and the free version of the desktop Google Earth tool can convert files between .KMZ and .KML format if needed.

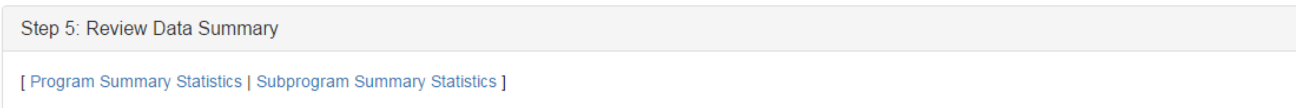
Step 4: Optional Supporting Documentation

Step 4 allows users to upload additional supporting documentation. Any data submitted here will not be used directly in reporting efforts nor displayed on published project maps. Submitted documentation will be stored with the submittal in the database.

Step 5: Review Data Summary

The final step before submitting data is to review all data for accuracy. Step 5 includes summary documents that aggregate uploaded data at both a program and subprogram level. The reports can also be printed and referenced as draft summary documentation using the links shown in Figure 20.

Figure 20



Step 6: Data Submission

Step 6 is to submit the complete data package for CARB review. When the data entry for the reporting cycle is complete, click “Submit Completed Data to CARB.”

Data Review

Once data are submitted successfully, CARB staff will review the data and either approve for upload into the database or return the submittal to the agency for revision. All agency users will receive an email alerting them of a returned or approved submittal. The overall data submittal process is described earlier in the document and is shown in Figure 4.

Additional Support

For additional information on submitting data using CCIRTS and technical support, please contact the program's CARB point of contact or *email the GGRF program*.

Frequently Asked Questions (FAQ)

1. **How frequently will agencies be reporting data?**
   Data are reported on an annual basis beginning 2025 covering activities from 11/1 through 10/31. Prior reporting 2024 and older was semi-annual with the first reporting cycle covering activities that occurred from 12/1 through 5/31 and the second reporting period covers activities that occurred 6/1 through 11/30.

2. **I need to give a new staff member at our agency access to CCIRTS to submit data. Can I do that from my CCIRTS account?**
   CARB staff manages user accounts and solicits lists of approved staff from each of the administering agencies. If new staff need to be added or removed, please contact CARB staff so that the appropriate approvals can be made. Approved users must register and create an account from the CCIRTS login page.

3. **Our agency programs are changing (adding new programs, removing old programs, combining programs, changing program names, etc.), so how do we update the reporting templates to handle this? How will data reported for new or sunsetting programs be handled?**
   Please contact CARB staff to discuss programs that are changing.

4. **For the public transparency and outreach section, should we report workshops that we funded but that we did not conduct?**
   Report on all workshops related to the program regardless of the entity that hosted the workshop (e.g., contractors, grantees, other implementing agencies). If another administering agency hosted or participated in the event, please coordinate with the agency and your CARB staff contact to ensure the same event participation isn't reported twice.

5. **We will not have grant agreements in place by the reporting deadline, yet we have announced program award recipients. How should we report this?**
   These projects do not need to be reported in CCIRTS until there are grant agreements in place. In past reporting cycles, these would be reported as "Selected" but this option was removed to simplify the process. Please continue to publicly post the full list of selected projects.

6. **My project has been awarded, but we have yet to reimburse the grantee. For the project costs that haven't been paid out yet, do we report on amount paid as of the end of the annual reporting period (October 31) or on the expected dollar amount to be paid out upon project closeout? What total project cost, GGRF (Greenhouse Gas Reduction Fund) funding amount, among others, do I report on?**
   Report total project cost & total GGRF funding that has been awarded, encumbered, or obligated to the project regardless if all of the funds have yet to be transferred. Report on the total expected dollar amount to be paid out upon closeout.

7. **This year, we added funds to an existing contract. For the estimated GHG reductions, do we report on the new estimated GHG reductions for the project as a whole (existing contract plus additional scope from expansion), or just the reductions associated with the expansion?**
   Since the existing contract has been reported as awarded, report only the new awarded funds in this reporting cycle as a new project with a unique project ID. The estimated GHG reductions for this project should correspond only with the additional awarded funds (i.e. only cover the expansion).

8. **Last year we reported an award as $50,500 in GGRF funds, but the contract was executed for $55,000. Can we access, change, and correct data submitted in previous years through CCIRTS?**
   Edits to previously submitted data must be made directly within the database and cannot be changed by CCIRTS agency users. Please contact CARB staff who will assist in making and documenting the corrections.

9. **In the CCIRTS Reporting Templates, which fields (columns) are optional?**
   In general, CARB staff strongly encourage administering agencies to fill out all fields to allow for comprehensive reporting on the outcomes of California Climate Investments. However, some fields may not be applicable to a given project within a subprogram and would therefore not be required. Some templates are designed to be used by more than one program, but no two programs are identical in reporting requirements. Additionally, all project-level reporting templates include fields for co benefits (e.g., air pollutants). CARB staff are working to update existing quantification methods and develop new methods for agencies to assess a suite of co benefits. New and updated quantification methods will include calculations for key variables and co benefits. If available, report the values associated with each project's co benefits. For programs that do not yet include quantification of co benefits, these fields are currently optional and can be left blank. Please contact CARB staff to receive additional guidance on which columns are currently applicable for your subprogram.

10. **The Reporting Templates have fields such as "Benefit Disadvantaged Communities (historical)? (Yes/No)" and "Benefit Criteria Table Step 1: Disadvantaged Community? (Y/N)" What is the difference? Do I have to report on both? Aren't they the same thing?**
    If projects were selected prior to the release of the Draft Funding Guidelines on August 4, 2017, the projects must report in accordance with the provisions of SB 535 and the 2015 version of the Funding Guidelines, including CalEnviroScreen version 2.0. The data associated with pre-August 4 projects are labeled as historical fields. Projects selected after August 4, 2017, must report in accordance with the provisions of AB 1550 and the version of CalEnviroScreen current at the time the project was awarded. Agencies may only report projects for a single legislative mandate.

11. We have annual progress updates to report from some previously reported projects. Past reporting templates had an "End of Year" tab for reporting such information. That tab is no longer in the new templates. How should we proceed?

Agencies should include ongoing implementation for projects reported in past years on the standalone "Implemented" tab with the originally reported project ID. Once project implementation is complete (e.g., all trees planted, all measures installed, all rebates distributed), the next time administering agencies should report on the project is at "Closeout" or end of a contract or grant term.

12. Our project has been operating for less than a year. How should we report on the project outcome fields in the "Outcome" tab? The reporting columns are on a "per year" basis. Should we pro-rate our values for the entire year or simply report on the value observed to date?

For outcome reporting, each project will report on the start and end date of tracking for the data submission. The value reported should be the actual amount/value that occurred within the tracking period. For the first and last years of outcome reporting, this tracking period may be less than a full year.

13. During outcome reporting, is it okay to report negative values? For example, for "change in energy use", should I report a reduction in energy use as a positive or negative value?

For project outcome reporting on the "Outcome" tab, some of the project benefits will be reported as a negative value, such as "Change in Energy Use". For reporting co benefits during project award or implementation, the project benefits may be reported as a positive value, such as "Energy Use Reductions". For further clarification, please contact CARB staff.

14. For reporting on jobs, does that include the employment of people during project construction and/or the ongoing employment once the project is completed and operational?

Report on all jobs supported by GGRF funds. Construction jobs may be reported as short-term and any operation and maintenance jobs associated with the project would be reported with a longer duration. The duration of employment is captured by reporting the number of work hours.

15. For reporting on project location, is a KMZ file preferred over latitudinal and longitudinal coordinates? Are other formats besides KMZ accepted for mapping purposes?

Latitude and longitude coordinates are required for mapping purposes. Every project must report a single geographic coordinate for preliminary mapping. If the project includes more complex locational information (i.e., many points, project area is a polygon rather than a point, or the project operates on a fixed line), the agency must provide a KMZ upload of supplemental location data. Each subprogram may only upload a single KMZ file per reporting submittal. The single KMZ upload includes individual KML files. Each KML file must be associated with a reported project ID, but not all projects reported a need to have an associated KML within the KMZ. If geospatial data is available in another file format, please convert the file into a KML file.

16. How will the data I report be displayed on the online map?

Projects that are reported aggregated by census tract use the census tract field for mapping. For other projects, the geographic coordinates submitted in the project-level Excel template are used for mapping. Reported addresses are not geocoded or used to display location information. Where supplemental location data are provided in the form of KML files, the KML data supersedes any geographic coordinates included in the project-level Excel spreadsheet.