

SharePoint Quick Reference Guide for District Submitter Excel 2007

Purpose

District staff will use SharePoint to complete, submit, revise, and view their Flexible Fund for Family Services (FFFS) Plans.

Office of Temporary and Disability Assistance (OTDA) and Office of Children and Family Services (OCFS) FFFS State Plan Reviewers will also use this site to review and approve the plans. If further clarification is necessary, the State Reviewers will return the plans to the Districts.

The SharePoint process will streamline the overall plan approval process by allowing District users with an easy way to share the Plans locally with their counterparts. In addition, SharePoint provides quick and easy access in a central location.

Overview of the FFFS SharePoint Review Process



Initial Notification

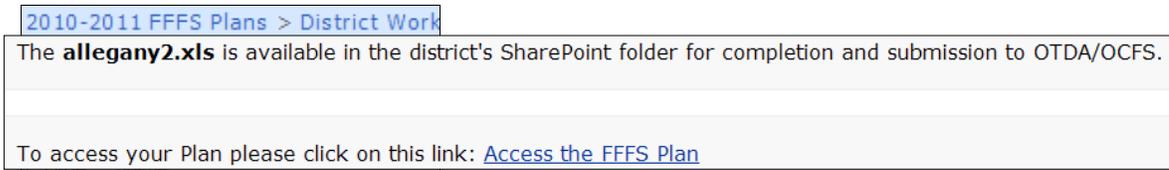
- The OTDA Plan Manager will upload the District's plan to the District's folder on SharePoint.
- The District Submitters and the District Reviewers will receive an e-mail in Outlook containing a link to their respective plan in SharePoint.

From: _sosspsservice@dfa.state.ny.us [mailto:_sosspsservice@dfa.state.ny.us]
Sent: Thursday, June 10, 2010 1:24 PM
To: Donohoe, Justin (OTDA); Training, Mezz01 (OTDA)
Subject: LDSS Initial FFFS Plan is available for completion and submission - SUBMITTER

- As part of SharePoint FFFS implementation, the **District Submitters will not take action until they are notified that the Plan is available in SharePoint for their completion and submission.**

Edit the Plan

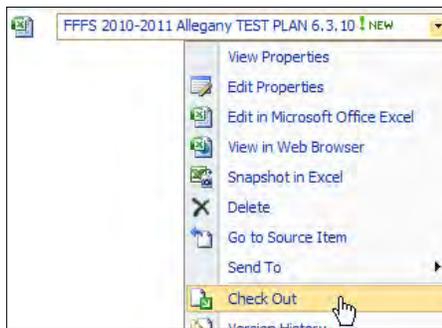
1. Click **Access the FFFS Plan** link in the e-mail.
You are brought to the **District Working Library** within SharePoint and your **Excel plan name** is visible.



2. In the **District Working Library**, click the + sign to expand the **Plan Year** group.
The plans will be displayed.



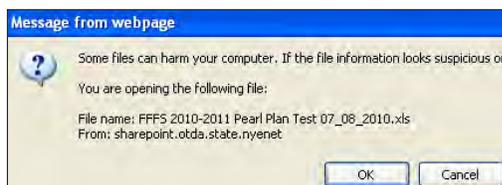
3. Hover over the FFFS Plan name and **click the down-arrow**.
A sub-menu opens.
4. Select **Check Out**.



A dialog box displays.

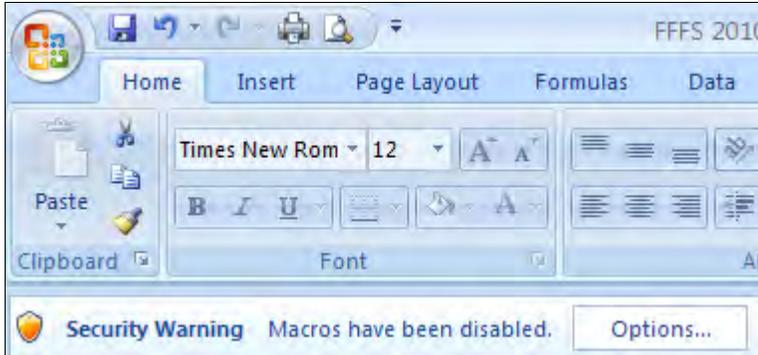


5. Click **OK**.
6. Click the down arrow again and select **Edit in Microsoft Office Excel**.
A dialog box displays.

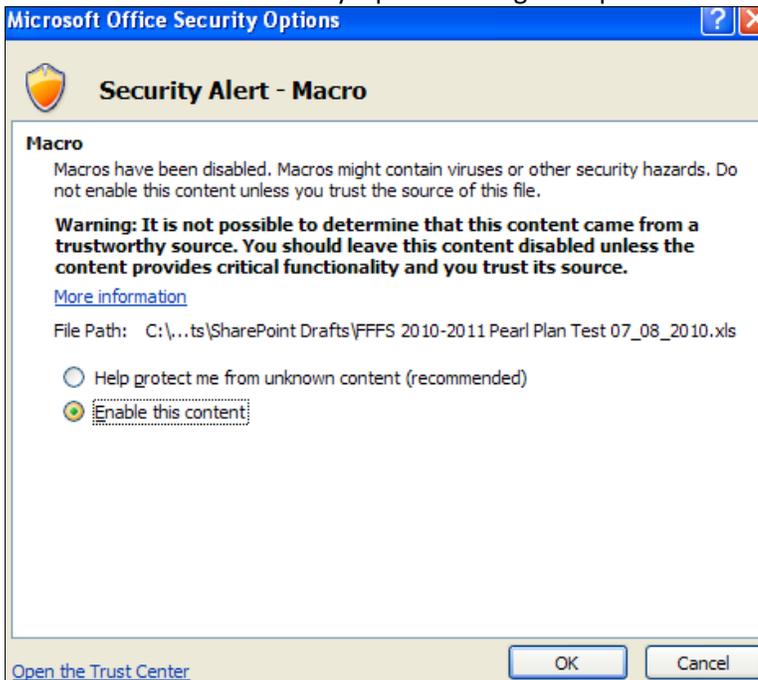


- Click **OK**.
The FFFS Plan opens in Excel.

- Notice the top of the worksheet area, right below the ribbon, there is a security warning:

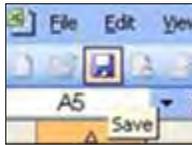


- Click **Options**.
The Microsoft Office Security Options dialog box opens.

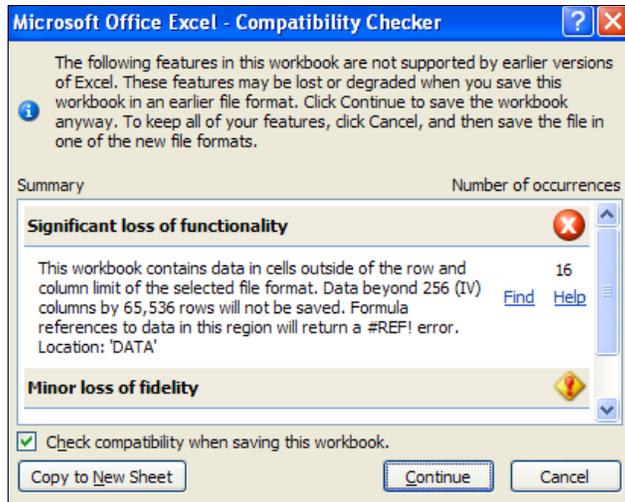


- Select **Enable this content** and click **OK**.
Any macros in the workbook can now be run.
- Enter your data into the spreadsheet ([Instructions](#) for completing the spreadsheet).

12. **Save** your changes.



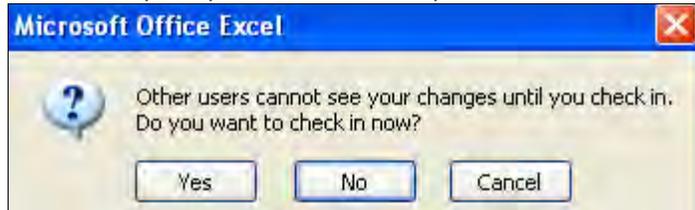
A dialog box about loss of fidelity displays because you are using Excel 2007 and the template is Excel 2003.



13. Click **Continue**.

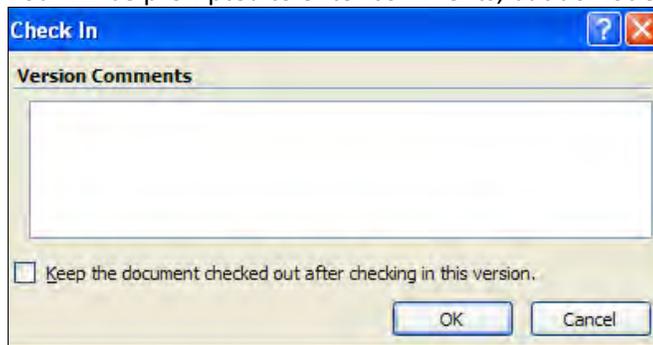
14. **Close** out of Excel.

You will be prompted to check the spreadsheet in.



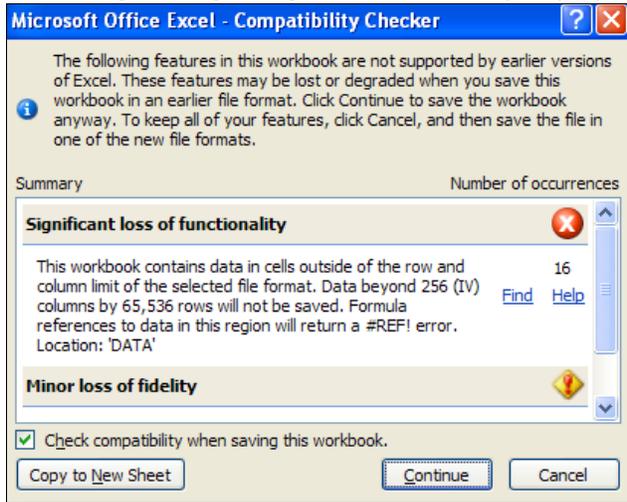
15. Click **Yes**.

You will be prompted to enter comments, but do not enter them here.



16. Click **OK**.

The dialog box regarding the loss of fidelity displays again.



17. Click **Continue**.

18. **Close** Excel again.

You will be returned to the District Reviewer Library.

As appropriate, contact your District Reviewer and let them know the Plan is ready for their review. You can let them know via phone, e-mail, or in-person.

After you receive notification from your District Reviewer that they have reviewed the plan, you will have to decide which action to take. Your District Reviewer will notify you via phone, e-mail, or in-person.

If the District Reviewer approved the plan as is, you are ready to submit the plan. Change the status to **Initial Submission**. To learn how to change the status, go directly to the [Submit a Plan](#) section of this guide.

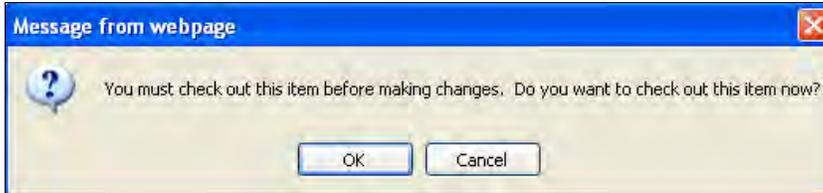
If the District Reviewer indicates changes are needed, you can make the change(s) and repeat the internal review process until you can follow the [Submit a Plan](#) section. Refer back to the [Edit the Plan](#) section within this guide to edit your plan.

Submit a Plan

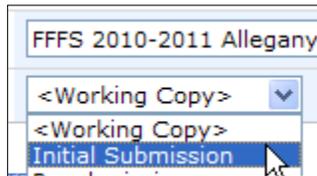
To submit a Plan for the first time, the District Submitter will set the Plan Status property to **Initial Submission**.

1. Navigate to the **District Working Library** within SharePoint.
2. Locate your file and click the down-arrow to the right of the file name.
3. Select **Edit Properties**.

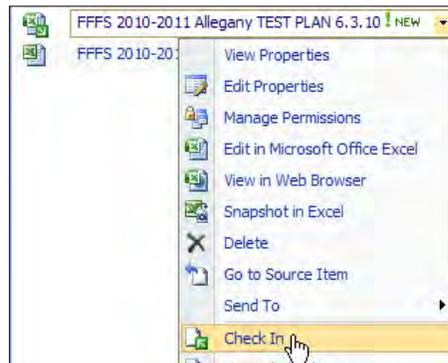
You will be prompted to **Check Out** the file first.



4. Click **OK**.
5. Select **Initial Submission** from the list.



6. Click **OK**.
You are returned to the **District Working Library**.
7. Hover over the Plan name and click the down-arrow, select **Check In**.
You will be prompted to enter comments, but you do not have to enter any.



8. Click **OK**.
You are returned to the **District Working Library** and the Plan has been submitted.
9. **Close** SharePoint by closing Internet Explorer.

Note: The submission needs to be triggered by **Checking In** the Plan. If you forget to click **Check In**, the plan will not be submitted to the State Reviewers.

For now, your part is complete. The FFFS Plan SharePoint site will generate e-mail notifications to you about the status of your Plan during the State Team review period.

A Submitted Plan

What happens to a submitted Plan?

- Once submitted, you and District Reviewer(s) will receive an e-mail confirmation that the Plan has been submitted.
- The Plan will no longer appear in the District Working Library.
- A read-only copy of the submitted Plan will be placed in the **Submitted District Draft Plans** library for your reference in the event that a State Reviewer has a question about the Plan.



- Once the Plan is approved by the State Review Team, the read-only copy is removed and the approved Plan is available in the District Working Library once again.

State Review Process

When the plan is submitted to the State Reviewers, they will all review the plan and you will be notified via e-mail. There are two possible e-mails you will receive depending on the outcome of the review:

- **Approval Outcome** – If the State Review Team approves the Plan, you will receive an approval e-mail and no further action is necessary from you.

Dear Commissioner: Justin Donohoe	
We are pleased to inform you that your district's initial SFY 2010-11 Flexible Fund for Family Services (FFFS) Plan have been approved on Jun 8, 2010. Both the Office of Temporary and Disability Assistance (OTDA) and the Office of Children and Family Services (OCFS) have reviewed and approved the information your district has entered. A copy of your initial plan has been placed into your district's Approved Folder on the FFFS Share Point site. A working copy of your approved plan has been placed into your District Folder.	
Claiming and reporting procedures are outlined in Part IV, Sections 3.1 and 3.2 of ADM-124.	
In closing, we would like to assure you that staff from OTDA and OCFS are available to assist you with any issues related to your Flexible Fund Plan. If you have any questions or concerns, please contact the appropriate person listed below:	
OTDA - Fiscal	Region 1-4: Edward Conway (518) 474-7549 Region 5: Marc Solomon (914) 995-5663 Region 6: Marian Borenstein (212) 961-8250
Employment	John James (518) 473-0430
Plan and TANF Services	Chris Insull (518) 474-9494
OCFS – Budget	Edna Mae Reilly (518) 474-1361 Rayana Gonzales (518) 402-3324
OCFS Program	OCFS Regional Offices

- **Changes** – If the Plan is not approved (one or more State Reviewers have comments) you will receive an e-mail stating that the appropriate State Reviewer will be contacting you to discuss the issue(s) and that resubmission of the plan is likely. The e-mail is just a notification.

The **FFFS 10-11 Albany New Test Plan 6_8_10.xlsx** requires modification/clarification. OTDA and OCFS have reviewed the Plan and have comments. You or your staff will be contacted by the appropriate state staff to discuss the comments.

Once the comments have been resolved the district must resubmit its Plan.

To access your Plan please click on this link: [Access the FFFS Plan](#)

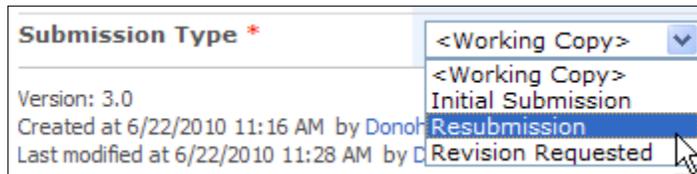
To submit the Plan please click on this link: [Edit the FFFS Plan Properties](#)

Note: Please coordinate with your local Reviewer(s)/Submitter(s) to resolve any issues and to re-submit your Plan in a timely manner. Thank you.

Re-submit the Plan

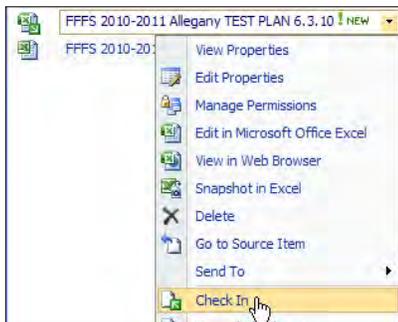
When the issues have been discussed/ resolved and the Plan is ready to be resubmitted to the State Reviewers, choose **Resubmission** from the list of **Submission Types**.

1. Navigate to your **District Working Library** within SharePoint.
2. Click the **down-arrow** to the right of the file name.
3. Select **Edit Properties**.
You will be prompted to **Check Out** the file first.
4. Click **OK**.
5. Select **Resubmission** from the list and click **OK**.



You are returned to the District Working Library.

6. Click the **down-arrow** of the plan and select **Check In**.



You will be prompted to enter comments but you do not have to enter any.

7. Click **OK**.
8. **Close** SharePoint by closing Internet Explorer.

Note: The resubmission needs to be triggered by **Checking In** the plan. If you forget to click **Check In**, the plan will not be re-submitted to the State Reviewers.

WARNING!



After each of the district's Initial Plans have been approved by OTDA/OCFS, and you are requesting **subsequent revision** to the Plan, you must NOT choose **Initial Submission when requesting your plan to be modified**. Depending on the situation, choose **Resubmission** if you are reacting to State comments/discussion. Choose **Revision Requested** when the district is initiating revision.

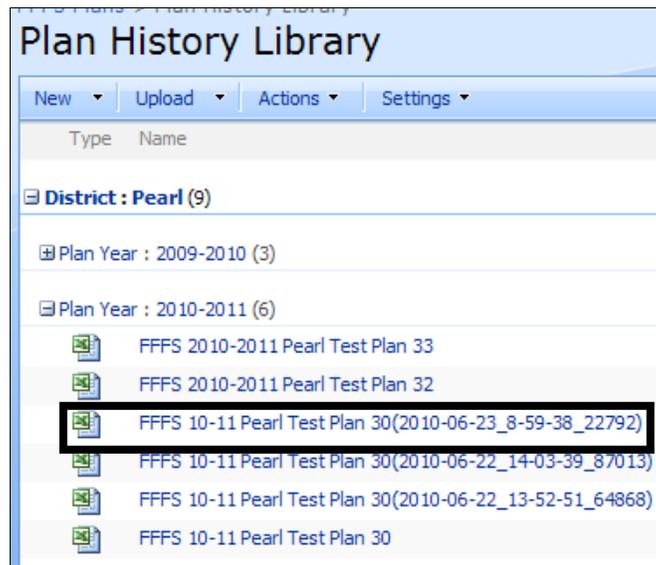
Plan Approved

Once the plan is approved, it is moved into two locations within SharePoint – Plan History Library and the District Working Library. It is important to note that the file names might appear slightly different if any revisions are made.

The **Plan History Library** is a read-only library and no one can edit a document within it. If a plan has had revisions after it has been initially approved, the file name will have the extension of date and time added to the regular format file name.

In the picture below you can see that **Test Plan 30** was originally approved, but had three revisions. The dates will tell you which is the most recent version. See screen shot below.

Test Plan 32 and **Test Plan 33** have both been approved, but have had no revisions; therefore, they are the most recent versions.



If you need to make revisions to a plan after it has been approved, you will navigate to the **District Working Library**.

The District Working Library only houses the most recently approved Plan and never has a date/time stamp. You would use the [Edit the Plan](#) and then the [Re-submit the Plan](#) sections of this manual to guide you through the revision requested process.

HELP

If you have any questions relating to the SharePoint process, please contact Christine Insull at (518) 474-9494 or send an e-mail to Christine.Insull@otda.state.ny.us. If you have any questions regarding the Excel template itself, please contact Ed Conway at (518) 474-7549 or send an e-mails to Edward.Conway@otda.state.ny.us

