SharePoint Quick Reference Guide for District Reviewer Excel 2003

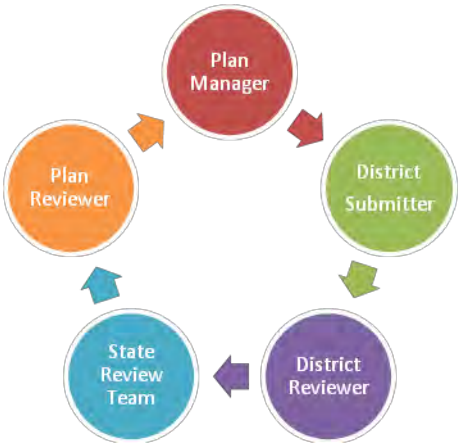
Purpose

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

The Office of Temporary and Disability Assistance (OTDA) and Office of Children and Family Services (OCFS) FFFS State Plan Review Team will use this site to review, approve, and when needed, return to district, submitted plans. If further clarification is necessary on a submitted plan, the State Review Team will return the Plan via SharePoint, and further action will be needed by the District.

The SharePoint process will streamline the overall Plan approval process by providing 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 Roles



Initial Notification

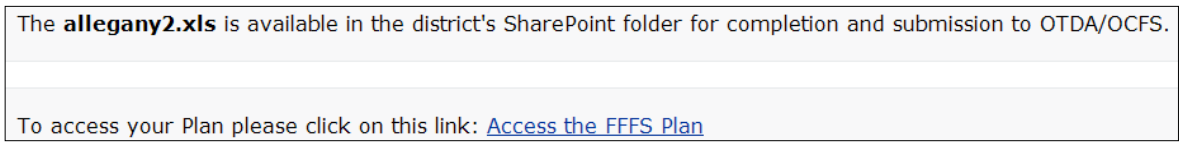
- The OTDA Plan Manager will upload the District's plan to the District's folder on SharePoint.
- The District Submitters and Reviewers will receive an e-mail in Outlook containing a link to their respective plan in SharePoint.

- As part of SharePoint FFFS implementation, the District Reviewers will not take action until they are notified by a SharePoint automated e-mail that the Plan is available in SharePoint for their review. The e-mail notification is sent to the Outlook inbox.

Review the Plan Only

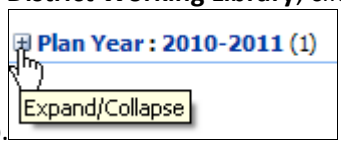
As a District Reviewer, you do not have rights to edit the plan on SharePoint.

1. Once the District Submitter has indicated that the plan has been completed and is ready for your review, click **Access the FFFS Plan** link in the e-mail you received initially.



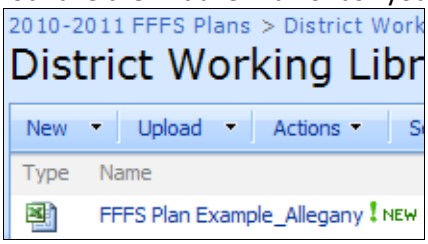
   You will be brought to the **District Working Library** within SharePoint.

2. In the **District Working Library**, click the **+** sign to expand the **Plan Year** group.



   Your **Excel Plan name** will be visible.

You can also navigate directly to the FFFS SharePoint site first and then to the District Working Library if you do not have the initial e-mail or ask your District Submitter to send you the link.



3. Hover over the Plan name and **click once**.
   A browser message displays.
4. Click **OK.**
   The FFFS Plan opens in Excel.

> ***Note:*** Depending on your security settings within Excel, you might be prompted to enable macros. Click **Enable Macros** to use the FFFS plan template if you are prompted.

5. Review the plan.
6. **Close** out of Excel.
   You are returned to the District Working Library.
7. **Close** SharePoint by closing Internet Explorer.

Inform your District Submitter once you have reviewed the Plan.

> ***Note:*** Once the Plan is finalized between the Reviewer and Submitter, the Submitter will submit the Plan for State review. Both Submitters and Reviewers will be notified via e-mail of the Plan's status during the approval process.

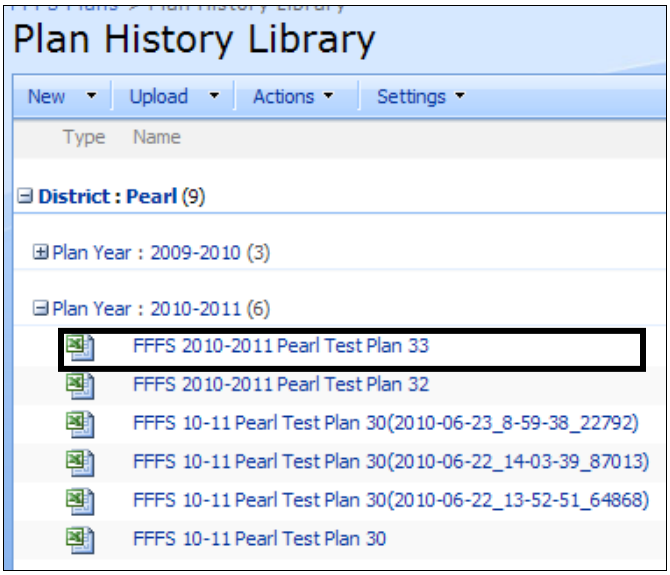
Plan Approved

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 initially approved, but had three subsequent revisions. The dates will tell you which is the most recent version.

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



The **District Working Library** houses the most recently approved plan and never has a date/time stamp. Reviewers can use this library to view the most recently approved plan. Submitters will navigate to this library when they need to make revisions to a plan.

HELP

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