



Emergency Food and Shelter National Board Program (EFSP) Website - User Guide for Local Boards

Copyright@2020 United Way. All rights reserved. This manual may not be copied, photocopied, reproduced, translated or converted to any electronic or machine-readable form in whole or part without prior written approval of United Way.

Third Edition: September 2020

Emergency Food and Shelter National Board Program
701 North Fairfax Street
Alexandria, Virginia 22314-2064
(703) 706-9660 - phone
(703) 706-9677 - fax
www.efsp.unitedway.org

Table of Contents

Welcome to the EFSP Website	3
How to Use this Guide	4
Glossary of EFSP Program Terms	8
Local Board Plan Submission	10
Reallocation	31
Interim Report and Second Payment	44
Final Reports	56
Phase End Date Extension Request	78
Variances	87
Roster	93
Manage Local Board Members	94
Manage LROs	98
Training Workshops	102
What Makes Sense; What Works	103
Key Program Dates	104



Welcome to the EFSP Website

This guide is designed to introduce you to using EFSP Website. The lessons in this User Guide will assist you navigate and process required submissions on EFSP Website and sign documents using DocuSign. The EFSP Website provides streamlined processes to ensure the quick release of funds and accountability of the use of funds. The Website allows the Chair/Contact Person of the Local Board to submit a Board Plan, Reallocation Requests, Interim Report and 2nd Payment Requests, Final Reports and Variance Requests and Manage LB and LRO Members' Information on the Website. This guide provides an in-depth tour across all the process provided in the Website. It also provides a systematic explanation of performing the entire task on the Website.

How to Use this Guide

This User Guide is divided into several topics. You can read the topics in order, or you can read the rest of this information and then start with the topic that best suits your interests and role. Within each topic, we have explained the step by step the complete workflow.

A. User Guide's Styles and Conventions

Sr. No.	Conventions	Usage
1	Icons/Images	<input checked="" type="checkbox"/> Check box  Back-forward navigation arrows  Radio buttons
2	Shading	Note, Condition and Tip
3	Bold font	Used to indicate Buttons, Tabs, Main-menu and Sub-menu, Check box, and Radio button.
4	Buttons	Add: Enables you to add information Cancel: Enables you to cancel the task and go back to the previous page Close: Enables you to close the Current screen Edit: Enables you to edit the data Exit: Enables you to exit the page/window Home: Enables you to go to Home page Print: Enables you to print a page/report OK: Enables you to save the data and close the window Refresh: Enables you to refresh the screen Reset: Enables you to reset the screen Save: Enables you to save the data. Sign Out: Enables you to log out from the application View: Enables you to view a report Undo: Enables you to undo changes
5	Button/Icon that should be clicked/checked in the course of a procedure are presented as follows: Click the Save button. Check the LRO radio button. Select from the Phase drop-down box.	
6	Pop-up message are enclosed in inverted commas. For e.g. "Reallocation Request Receipt added successfully".	
7	If an instruction requires the number of the Phase/LB number/LRO number/SSA number, it is represented as #/#####/#####/##### If an instruction requires the name of a User, it is represented as 'XYZ'.	

B. System Requirements

Below are the system requirements, which are essential to run the process:

1. Version 7.0 or later of Microsoft Internet Explorer or version 3.5 or later of Mozilla Firefox
2. Recommend ActiveX be enabled for Internet Explorer
3. JavaScript and cookies enabled
4. 1024 x 768 monitor resolution recommended
5. Adobe or PDF reader
6. Turn off the Pop-Up blocker

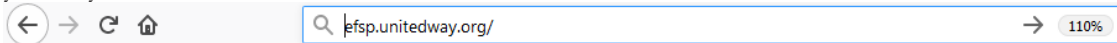
C. Logging In

The following authority can login to EFSP Website:

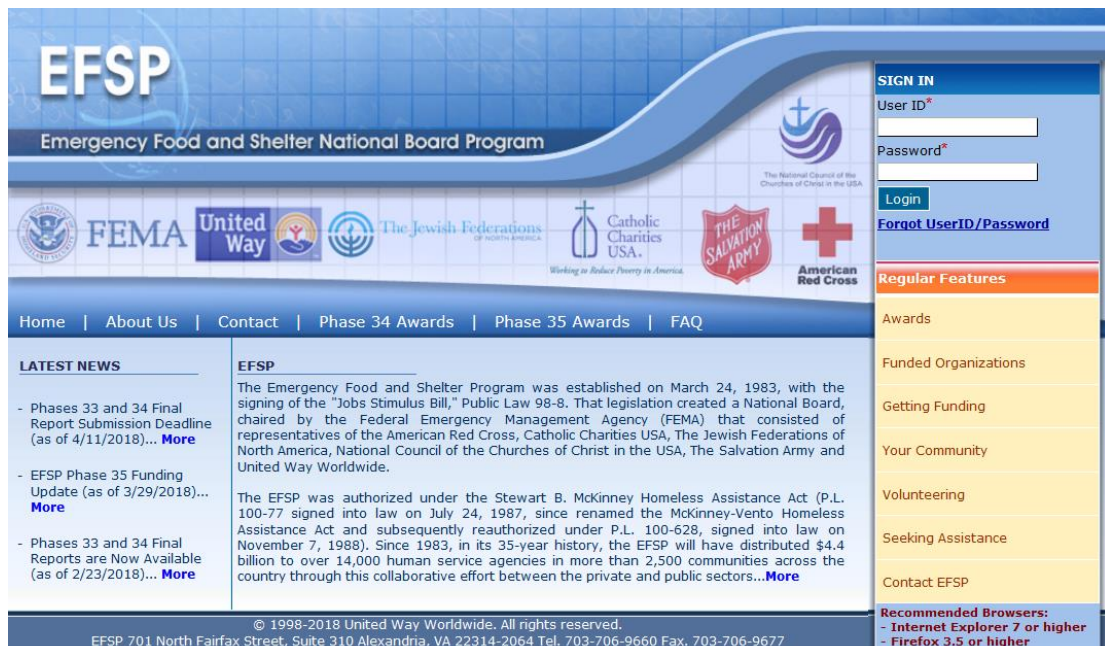
- Local Board Chair
- Local Board Contact Person
- Local Board Roster

Only the Local Board Chair and Contact Person can submit Board Plan, Reallocation Request, Interim Report and 2nd Payment Request, Final Report and Variance Request, Manage LB and LRO Information, Local Board Roster can view reports on the Website.

1. Type <http://www.efsp.unitedway.org> in your preferred internet browser and press **Enter** key on your keyboard.



EFSP Website **Home** screen appears.



EFSP
Emergency Food and Shelter National Board Program

SIGN IN
User ID*
Password*
Login
[Forgot UserID/Password](#)

Regular Features
Awards
Funded Organizations
Getting Funding
Your Community
Volunteering
Seeking Assistance
Contact EFSP

Recommended Browsers:
- Internet Explorer 7 or higher
- Firefox 3.5 or higher

© 1998-2018 United Way Worldwide. All rights reserved.
EFSP 701 North Fairfax Street, Suite 310 Alexandria, VA 22314-2064 Tel. 703-706-9660 Fax. 703-706-9677

*Tip: You can reach the EFSP Website's **Home** Page from anywhere in the interface by clicking the **Home** button at the top left corner of the screen.*

2. Enter your six digits User ID in the **User ID** field.

Note:

- User ID of Chair and Contact Person is the six digits LB Number (e.g. 000601).
- User ID for Local Board Roaster is the Email ID of the Local Board Roaster.

3. Enter your Password in **Password** field.
4. Click on the **Login** button.
EFSP Website **Home** screen appears.

EFSP Emergency Food and Shelter National Board Program

Welcome : LB Contact (LB-085800)

Home | Sign Out

Item No.	Phase 33 & 34 Clarifications	User Instructions
1		<p>Phases 33 and 34 Local Board Plan Submission Deadline (as of 10/15/2017)</p> <p>The National Board will continue to accept Local Board Plans for Phases 33 and 34 allocations. There is no penalty for submitting the plan late. However, the delay in submission of the Local Board Plan will cause delay in the processing and approving of the plan to release funds to LROs. EFSP staff is available to assist Local Boards with their Local Board Plans as needed. Please call 703-706-9660 for assistance.</p> <p>IMPORTANT: Please note, the latest date LROs may spend funds is January 31, 2018. The jurisdiction's spending end date is determined by the Local Board.</p>
2		<p>PHASE 33 FINAL REPORTS (as of 7/12/2017)</p> <p>The Emergency Food and Shelter Program (EFSP) provided a deadline for submission of Final Reports for Phase 33 when award announcements were made in July 2016. The deadline was provided in the EFSP Key Changes Program Clarifications and Reminders document and Key Program Dates document, which are accessible on the EFSP website. However, given spending period extension to January 31, 2018 to allow LROs time to thoughtfully spend funds in their communities, Phase 33 funding continues to be issued and Phase 33 Final Reports have been delayed. Phase 33 Final Reports will be submitted together with Phase 34 Final Reports. More detail regarding Phase 33 Final Reports and the new due date for submission to the National Board will be provided at a later time.</p> <p>If you have questions regarding this message, please contact the staff at efsp@uww.unitedway.org or 703-706-9660.</p>
3		<p>Important Message Regarding Submission of Forms (as of 6/29/2017)</p> <p>When submitting required forms and certifications to the Emergency Food and Shelter Program (EFSP), please ensure the entire form is visible in your submission. Based on guidance received from our auditors, EFSP cannot accept partial forms (i.e. forms are cut off). Please take extra care to ensure forms do not get cut off in the scanning process. Staff will process submissions as quickly and efficiently as possible. Please note, the receipt of partial information will cause a delay in the release of funds to LROs.</p> <p>Your compliance with this request is appreciated. If you have questions, please contact the EFSP staff at efso@uww.unitedwav.org or</p>

Main Menu User Name Home and Sign Out

Tip: You can return to this home page at any time by clicking on the **Home** link on the top right corner.

If You Don't Remember Your User ID or Password or Both

- Click the Forgot Password link.
- Forgot Username/Password window appears.

Forgot UserID/Password

Forgot User ID/Password

Please enter your email-id that you provided at the time of registration, and click on "Submit" to receive an email with your login details.

Enter email address :

SIGN IN

User ID*

Password*

[Forgot UserID/Password](#)

- Enter the Email ID (provided at the time of registration).
- Click the **Submit** button.

If the Email ID does entered does not match with the one provided at the time of registration then a pop-up message appears.

If You Are Logging In For The First Time, System Ill Request You To Change Your Password.

Change Password

Please change your system generated password.

New Password

Confirm New Password

- Enter your new Password in **New Password** field.
 - Note:** New Password must be at least 8 characters long.*
 - Enter your new password again in the **Confirm New Password** field.
 - Click the **Submit** button.
 - A pop-up message appears that says, "Please login again with new password."
 - Click the **OK** button.
- EFSP Website **Home** screen appears.

Glossary of EFSP Program Terms

Agency: Non-profit or governmental unit receiving funds through the Emergency Food and Shelter Program, see Local Recipient Organization (LRO).

Award: The dollar amount allocated to the State Set-Aside Committee, a jurisdiction or an individual LRO.

BLS: Bureau of Labor Statistics, federal government agency that provides unemployment data for use in making funding allocations.

Documentation: Cancelled checks and invoices or schedules to support expenditures.

- DR: Documentation required.
- NDR: No Documentation required.

Electronic Funds Transfer (EFT): The ability to directly transfer/deposit funds into agencies/LROs bank accounts.

FEIN: The federal employer's taxpayer ID number given to agencies by the Internal Revenue Services (IRS). This number is also called the EIN number for EFSP purposes.

End Date: Date by which all funds must be expended, this date is selected annually by the Local Board.

Final Report: Annual report filed by each Local Board and LRO of expenditures of program funds.

The report is two parts:

- Local Board Summary Certification: Local Board's confirmation that the reported information submitted is accurate and according to the EFSP guidelines.
- LRO Report: Annual report of agency expenditures of program funds.

Fiscal Agent: An LRO that maintains all EFSP financial records for another agency. Both organization names must be listed on the Local Board Plan and Final Report. A certification form must be completed by the fiscal agent and maintained by the Local Board.

Fiscal Conduit: An LRO that maintains all EFSP financial records on behalf of two or more other agencies under a single grant. Only the fiscal conduit agency's name will appear on the Local Board Plan and Final Report. A certification form must be completed by the fiscal agent and maintained by the Local Board. In addition, a supplemental report must be completed for each agency under the umbrella agency when Final Reports are completed and filed with the National Board.

Jurisdiction: City, county or combination receiving funds through the Emergency Food and Shelter Program.

Local Board (LB): Decision making body for each jurisdiction.

Local Board Chair: Person elected in a jurisdiction to serve as the primary point of contact with signing authority.

Local Board Identification The six-digit unique number which identifies the specific jurisdiction/Local Board.

Local Board Plan: Forms online forms completed, e-signed and return to the National Board indicating the LROs allocated funds by the Local Board. The Local Board Plan is in four parts and must be submitted via the Website and e-signed.

Local Board Staff: Person selected in a jurisdiction to serve as the primary point of contact in lieu of the Local Board chair. This person is usually given signing authority in the chair's absence.

Local Recipient Organization (LRO): Non-profit or governmental unit receiving funds through the Emergency Food and Shelter Program. LROs are also referred to as agencies.

Local Recipient Organization Identification: The nine digit unique number which identifies each LRO within a jurisdiction.

National Board (NB): Decision making body for the Emergency Food and Shelter Program mandated by Congress.

Phase: Grant cycle.

Phase Spending Period: The period of time which a jurisdiction has to spend its entire EFSP award. The spending period may vary for each jurisdiction.

Program Compliance Exception (PCE) Form: Used to record exceptions found in documentation submitted by LROs/agencies.

Second Payment/Interim Report: The form necessary for the LRO to submit to the Local Board and National Board for release of their second half of an award which reflects their program spending to date.

State Set-Aside (SSA) Committee: Decision making body for each State receiving funds to award to jurisdictions with a need not reflected or greater than reflected in the statistics used by the National Board.

State Set-Aside Committee Board Plan: Forms sent to State Set-Aside Committees to notify them of the funding to the State. The plan includes award amounts to all directly funded jurisdictions and the amount available for the committee to allocate to jurisdictions throughout their State. The plan must be returned to the National Board so that awards can be made and notices mailed to the jurisdictions funded by the committee. State Set-Aside Committees must also submit to the National Board the roster of their board members and the survey/reason to support their funding decisions.

State Set-Aside Committee Chair: Person elected to serve as the primary point of contact for the committee.

State Set-Aside Committee Staff: Person selected to serve as the primary point of contact in lieu of the committee chair. This person is usually given signing authority in the chair's absence.

Status Sheet: Computer generated form to record compliance status for jurisdiction.

Unexpended/Returned Funds: Funds not spent by LRO that must be returned to the National Board, \$5.00 or more.

Local Board Plan Submission


In the **Board Plan** main-menu, Chair/Contact Person of the Local Board can submit Board Plan of all the LROs (whether funded directly, SSA, SSA Reallocation or National Board Reallocation). LB must submit a separate Board Plan for each award type.

A. View/Print Previous Phase Board Plan Details Report

1. Click on **Board Plan** on the main-menu.
Board Plan screen appears with Board Plan details of the Current Phase.
2. Select the Phase from the **Phase** drop-down box.

Note: Board Plan be viewed/printed for any Phase. The default Phase will always be the Current Phase.

3. Select the Part from the **Part** drop-down box.

Board Plan					
Plan	Award	Due Date	Status	View	Reports
Direct	\$61,867	07/10/2017	Board Plan process has been successfully completed and signed.		LRO Awards in Categories Program Overview Direct Award Letter Recommendation Letter LB Checklist
SSA	\$0				
SSACR	\$0				
NBR	\$0				

Phase : 34 Part : 1 Award Type : Direct LRO DIRECT Award Graph

4. Click on the pdf icon under **View**.
Local Board Plan Details report gets generated. The **LRO Plan Details** report is generated as well.

B. Update Local Board Roster

1. Click on **Manage LB Members** on the main-menu.

LB Members List screen appears with the LB members' details in the grid.

LB Member	Affiliation	Chair	Signer	Contact	Phone
Board Chair	UW	Yes	Yes	No	555-555-5555
Board Contact	IR	No	Yes	Yes	555-555-5555
Board Member	SA	No	No	No	555-555-5555
Board Member	JF	No	No	No	555-555-5555
Board Member	CC	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555
Board Member	UW	No	No	No	555-555-5555
Board Member	HS	No	No	No	555-555-5555
Board Member	RC	No	No	No	555-555-5555
Board Member	CM	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555

2. Use the **Add**, **Edit** and **Delete** buttons to update each Local Board Member's contact information.
3. After the contact information has been entered, Click **Save**.

Jurisdiction: 000000 | Sample County, State

Member of*: UW - United Way

No Organization in area | Invited but didn't participate

First Name: Board | Middle Name: | Last Name*: Chair | Salutation: | Title: | Organization: | Address*: | City-State-Zip*: City - State - 00000 | Phone*: 555-555-5555 | Ext.: | Fax: | Email*: kelly.andreae@uww.unitedway.org | Password: | Confirm Password: |

This Member is:
 Chair
 Authorized to sign
 Contact Person

Navigation: <|< < > >| Save Delete Close

4. A pop-up message will appear that says, "Board Member information updated/added/deleted successfully."

- Click **Print Roster** to review the Local Board Roster before submitting the Local Board Plan. Ensure that each of the required National Board agencies is represented, or has been invited.

LB Members List

LB Number: LB Name:

Search By Member Name:

LB Member	Affiliation	Chair	Signer	Contact	Phone
Board Chair	UW	Yes	Yes	No	555-555-5555
Board Contact	IR	No	Yes	Yes	555-555-5555
Board Member	SA	No	No	No	555-555-5555
Board Member	JF	No	No	No	555-555-5555
Board Member	CC	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555
Board Member	UW	No	No	No	555-555-5555
Board Member	HS	No	No	No	555-555-5555
Board Member	RC	No	No	No	555-555-5555
Board Member	CM	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555

Page 1 of 1 Showing 1 - 11 out of 11

Local Board Roster
For Sample County: 0000-00
Local Board ID: 000000

Page 1 of 1

03/12/2018

Board Chair Organization Address City, AL 00000	Chair Signer Phone 555-555-5555 Fax Email kelly.andreae@uww.unitedway.org	United Way
--------------------------------------------------------------	------------------------------------------------------------------------------------	------------

Board Contact Organization Address	Contact Signer Phone 555-555-5555	Hotlines/Information and Referral
------------------------------------------	--------------------------------------	-----------------------------------

***Note:** The email addresses of Board Members designated as signers will be used to send documents for e-signing during the Local Board Plan Certification process. Please ensure the email addresses are correct and no more than three members are designated as signers.*

C. Manage LROs

To allocate funds to an organization, it must be registered as a LRO in the EFSP database.

***Note:** The email addresses of LRO Contact will be used to send documents for e-signing during the LRO Certification process. Please ensure the contact information and email addresses are correct for each LRO that will be allocated funds.*

- Click on **Manage LRO** on the main-menu.
LRO Details screen appears with the LRO details in the grid.

LRO Details

LB Number LB Name

Search By LRO Name Edit by LRO No.

LRO ID	LRO Name	Email	Fiscal Ag...	Deleted
001	Sample Shelter	kelly.andreae@uww.unitedway.org	NO	NO
002	Sample Food Bank	kelly.andreae@uww.unitedway.org	NO	NO
003	Sample Food Pantry	kelly.andreae@uww.unitedway.org	NO	NO

Page of Showing 1 - 3 out of 3

2. **Select** the LRO you would like to edit or delete, it will be highlighted in blue. Use the **Add**, **Edit** and **Delete** buttons to update each LRO's contact information.
3. After the information has been entered, Click **Save**.

LRO Information

LB No. LB Name

LRO No. Deleted

LRO Name

Contact	<input type="text" value="LRO Contact"/>	Salut. <input type="text"/>	Affiliation	<input type="text"/>
Address	<input type="text" value="Address"/>		Target1	<input type="text"/>
	<input type="text"/>		Target2	<input type="text"/>
	<input type="text"/>		Target3	<input type="text"/>
City-State-Zip	<input type="text" value="City"/>	<input type="text" value="00000"/>	HC Access	<input type="checkbox"/>
EIN of LRO	<input type="text"/>	Fiscal Agent <input type="checkbox"/>	Service Provider EIN	<input type="text"/>
ABA No.	<input type="text"/>	DUNS No. <input type="text"/>	Account No.	<input type="text"/>
Phone	<input type="text" value="555-555-5555"/>	Ext <input type="text"/>	Fax <input type="text"/>	Password <input type="password" value="*****"/>
Email	<input type="text" value="kelly.andreae@uww.unitedway"/>		Confirm Password	<input type="password" value="*****"/>
Web Site	<input type="text"/>			

Note: You cannot update the Organization name, FEIN, DUNS number, and bank account information from the website. The required forms to update that information is available on the EFSP website under **EFT** or **DUNS**.

4. A pop-up message will appear that says, "LRO information updated/added/deleted successfully."

D. Submit Board Plan

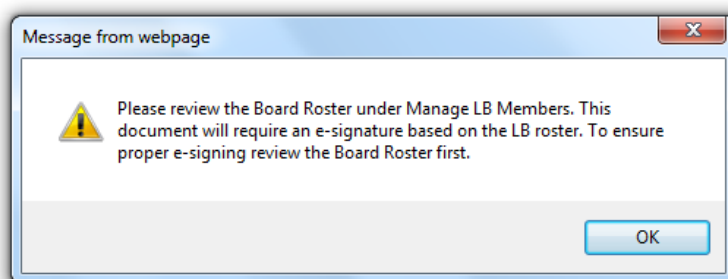
Condition: Local Board Plans can be submitted for the current Phase only, and need to have been released by the National Board.

1. Click on **Board Plan** on the main-menu.

The screenshot shows the EFSP website interface. The top navigation bar includes the EFSP logo, the text "Emergency Food and Shelter National Board Program", and a user greeting "Welcome : LB Chair (LB-00000)". A "Home | Sign Out" link is also present. On the left, a vertical navigation menu lists various options, with "Board Plan" highlighted in a red box. The main content area displays a table with three items under the heading "Phase 33 & 34 Clarifications".

Item No.	User Instructions
1	<p>Phases 33 and 34 Local Board Plan Submission Deadline (as of 10/15/2017)</p> <p>The National Board will continue to accept Local Board Plans for Phases 33 and 34 allocations. There is no penalty for submitting the plan late. However, the delay in submission of the Local Board Plan will cause delay in the processing and approving of the plan to release funds to LROs. EFSP staff is available to assist Local Boards with their Local Board Plans as needed. Please call 703-706-9660 for assistance.</p> <p>IMPORTANT: Please note, the latest date LROs may spend funds is January 31, 2018. The jurisdiction's spending end date is determined by the Local Board.</p>
2	<p>PHASE 33 FINAL REPORTS (as of 7/12/2017)</p> <p>The Emergency Food and Shelter Program (EFSP) provided a deadline for submission of Final Reports for Phase 33 when award announcements were made in July 2016. The deadline was provided in the EFSP Key Changes Program Clarifications and Reminders document and Key Program Dates document, which are accessible on the EFSP website. However, given spending period extension to January 31, 2018 to allow LROs time to thoughtfully spend funds in their communities, Phase 33 funding continues to be issued and Phase 33 Final Reports have been delayed. Phase 33 Final Reports will be submitted together with Phase 34 Final Reports. More detail regarding Phase 33 Final Reports and the new due date for submission to the National Board will be provided at a later time.</p> <p>If you have questions regarding this message, please contact the staff at efsp@uwv.unitedway.org or 703-706-9660.</p>
3	<p>Important Message Regarding Submission of Forms (as of 6/29/2017)</p> <p>When submitting required forms and certifications to the Emergency Food and Shelter Program (EFSP), please ensure the entire form is visible in your submission. Based on guidance received from our auditors, EFSP cannot accept partial forms (i.e. forms are cut off). Please take extra care to ensure forms do not get cut off in the scanning process. Staff will process submissions as quickly and efficiently as possible. Please note, the receipt of partial information will cause a delay in the release of funds to LROs.</p>

2. A pop up message appears reminding the Local Board to update the Local Board Roster and designated Signers. Click **OK**.



Please update your Board Roster at this time, by clicking **Manage LB Members** on the left-hand navigation menu, if you have not already done so.

Board Plan screen appears.

Phase : 35 Part : 1 Board Plan

Plan	Award	Due Date	Status	View	Reports
Direct	\$12,676	05/03/2018	Click here to enter and submit Board Plan to EFSP.		LRO Awards in Categories Program Overview Direct Award Letter Recommendation Letter LB Checklist
SSA	\$0				
SSACR	\$0				
NBR	\$0				

Phase : 35 Part : 1 Award Type : Direct LRO Direct Award Graph

No data found for Direct Type Plan !

- Click on the **Click Here** link.
The Local Board Information Screen appears.

Local Board Personal Information :-

LB Number	000000	LB Name	Sample County, State
Chair	Board Chair	Title	Title
Contact	Board Contact Address City, AL 00000	Phone : 555-555-5555 Fax : 555-555-5555 Email : kellyann114@gmail.com	Extension :

Local Board Direct Plan Details :-

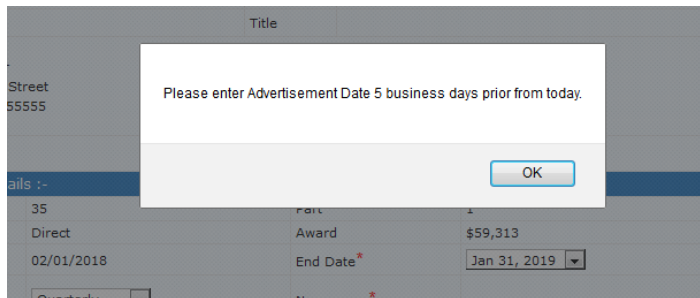
Phase	35	Part	1
Plan Type	Direct	Award	\$12,676
Start Date	10/01/2016	End Date*	Jan 31, 2019
Meeting Frequency*	Select...	Newspaper*	
Radio/TV		Advertisement Date*	
Administrative Allowance	\$254 (part of, NOT IN ADDITION TO, award amount)		

- Review the Local Board Personal Information and ensure the contact information is correct. If not, please use **Manage LB Members** from the left-hand menu to update the contact information.

5. Enter the Local Board Plan Details in the required fields:
 1. Select the **End Date** from the drop-down menu (the default end date will be the latest possible end date).
 2. Select the Meeting Frequency from the drop-down menu.
 3. Enter the name of the Radio/TV station in the **Radio/TV** field, if an additional advertisement is done by Radio/TV (this field is not required).
 4. Enter the name of the Newspaper in the **Newspaper** field where the funding advertisement ran.
 5. Select the **Advertisement Date** from the calendar icon.

Local Board Direct Plan Details :-			
Phase	35	Part	1
Plan Type	Direct	Award	\$12,676
Start Date	10/01/2016	End Date*	Jan 31, 2019 ▾
Meeting Frequency*	Quarterly ▾	Newspaper*	Local Newspaper
Radio/TV	<input type="text"/>	Advertisement Date*	03/01/2018 📅
Administrative Allowance	\$254 (part of, NOT IN ADDITION TO, award amount)		
<input type="button" value="LRO Plan"/> <input type="button" value="Close"/>			

***Note:** You cannot select a date later than 5 days from the current date. The Local Board needs to wait 5 days following the advertisement to enter the Local Board Plan. If you enter some date less than 5 days before today's date or a future date an error message will appear.*



6. Click the **LRO Plan** button.

LRO Plan Details appears.

LRO Plan			
LB Number	000000	LB Name	Sample County, State
Total LB Award	12,676	Remaining LB Award	12,676
LRO Number	001-Sample Shelter		
Contact	LRO Contact Ph: 555-555-5555 Email: kelly.andreae@uww.unitedway.org		
Please enter amount in whole dollars only			
Lobbying Certificate	<input type="checkbox"/>		
Fiscal Agent/Fiscal Conduit	<input type="checkbox"/>	Number of Sub-Grantees	0
Served Meals	\$ 0	Other Foods	\$ 0
Mass Shelter	\$ 0	Other Shelter	\$ 0
Supplies / Equipment	\$ 0	Rehabilitation	\$ 0
Rent / Mortgage	\$ 0	Utility Assistance	\$ 0
Administration	\$ 0	LRO Total	\$ 0
<input type="button" value=" <"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value="> "/> <input type="button" value="Save without Submit"/> <input type="button" value="Submit and E-Sign"/> <input type="button" value="Close"/>			

- Select the desired LRO from the **LRO** drop-down box to distribute award.
OR
Select the desired LRO by clicking on back-forward arrow navigation arrows.

Note: If LRO has some compliance/hold/information missing/error, then a warning message will pop-up.

- Check the **Fiscal Agent/Fiscal Conduit** check box if the LRO serves as a Fiscal Agent or Fiscal Conduit. And enter the number of Sub-Grantees.

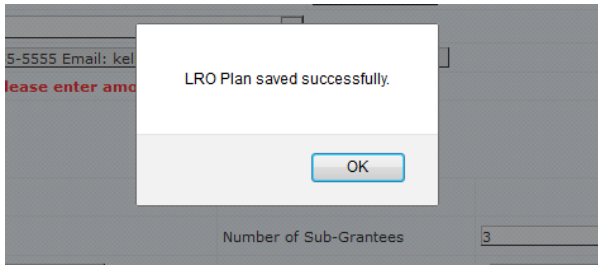
Note: An LRO, who administrates work for one or more other agencies/ sub-recipients, is called a Fiscal Agent or Fiscal Conduit. It is important to note the correct number of sub-grantees because this number will generate the number of Fiscal Agent/Fiscal Conduit Forms that need to be completed before funds will be released to the LRO.

- The Lobbying Certificate box will automatically be checked if the award amount is greater than \$100,00.

Note: If **LRO Total** greater than or equal to \$100,000, then a pop-up message appears that says, "Lobbying Certificate is required!"

- Enter the amount allocated for different categories in the respective categories.
Remaining LB Award amount gets subtracted as award is distributed to LROs.

- Click the **Save without Submit** button.
A pop message appears that says, “LRO Plan saved successfully”.



- Click the **OK** button.
- Select other LRO(s) and do step **12-16**.
Until **Remaining LB Award** amount becomes 0.
- When you are satisfied with the entry of the LRO Allocations, click the **Submit and E-Sign** button.

***Note:** If Total LB Award is not distributed among the LROs and **Submit** button is clicked then, a pop-up message appears that says, “Total LB Award is not distributed, please enter remaining award (\$#,###).” Click the **OK** button and distribute the remaining LB Award.*

***Note:** If the Local Board allocates more than 2% in administration a pop-up message appears that says, “Total Administrative Amount can’t be more than the Administrative Allowance.” Click the OK button and edit the Administrative category.*

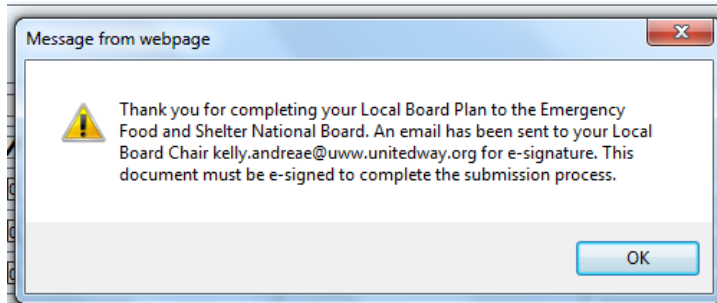
- A confirmation message appears, “Are you sure you want to submit your Board Plan to EFSP?”
Click **OK**.

LRO Plan			
LB Number		LB Name	
Total LB Award	12,676	Remaining LB Award	0
LRO Number	001-Sample Shelter		
Contact	LRO Contact Ph: 555-555-5555 Email: kelly.andreae@uwww.unitedway.org		
Please enter amount in whole dollars only			
Lobbying Certificate	<input type="checkbox"/>		
Fiscal Agent/Fiscal Conduit	<input type="checkbox"/>		
Served Meals	\$ 0		
Mass Shelter	\$ 7,676		
Supplies / Equipment	\$ 0		
Rent / Mortgage	\$ 0	Utility Assistance	\$ 0
Administration	\$ 0	LRO Total	\$ 7,676

Message from webpage

? Are you sure you want to submit the Board Plan to EFSP?

- A confirmation message appears, “Thank you for completing your Local Board Plan to the Emergency Food and Shelter National Board. An email has been sent to your Local Board Chair [email address] for e-signature. This document must be e-signed to complete the submission process.” Click **OK**.



Board Plan screen appears with the submitted Board Plan details. The status is set at completed and notes that the Local Board Chair must sign to complete the signing process.

Phase : 35 Part : 1 Board Plan

Plan	Award	Due Date	Status	View	Reports
Direct	\$12,676	05/03/2018	The Local Board has completed the Local Board Plan. An email will be sent to the Local Board Chair and other designated signers for e-signature to complete the submission process.		<ul style="list-style-type: none"> LRO Awards in Categories Program Overview Direct Award Letter Recommendation Letter LB Checklist
SSA	\$0				
SSACR	\$0				
NBR	\$0				

Phase : 35 Part : 1 Award Type : Direct LRO Direct Award Graph

LRO No.	Award Amount
001	\$7,500.00
002	\$2,500.00
003	\$2,500.00

An email is sent to the Local Board Chair by DocuSign to electronically sign the Local Board Plan Certification.

After the Local Board Chair e-signs the Local Board Plan Certification, the local board plan will be routed to any other designated signers in the database (up to 3 signers total) to electronically sign.

After the Local Board Chair and all other designated signers have signed the Local Board Plan, all signers will receive an email with a copy of the signed report and the pdf will be able to be viewed on the EFSP website.

Phase : 35 Part : 1 Board Plan				
Plan	Award	Due Date	Status	View
Direct	\$12,676	05/03/2018	The Board Plan has been successfully completed. Click to view/download the e-signed Local Board Certification.	
SSA	\$0			
SSACR	\$0			
NBR	\$0			

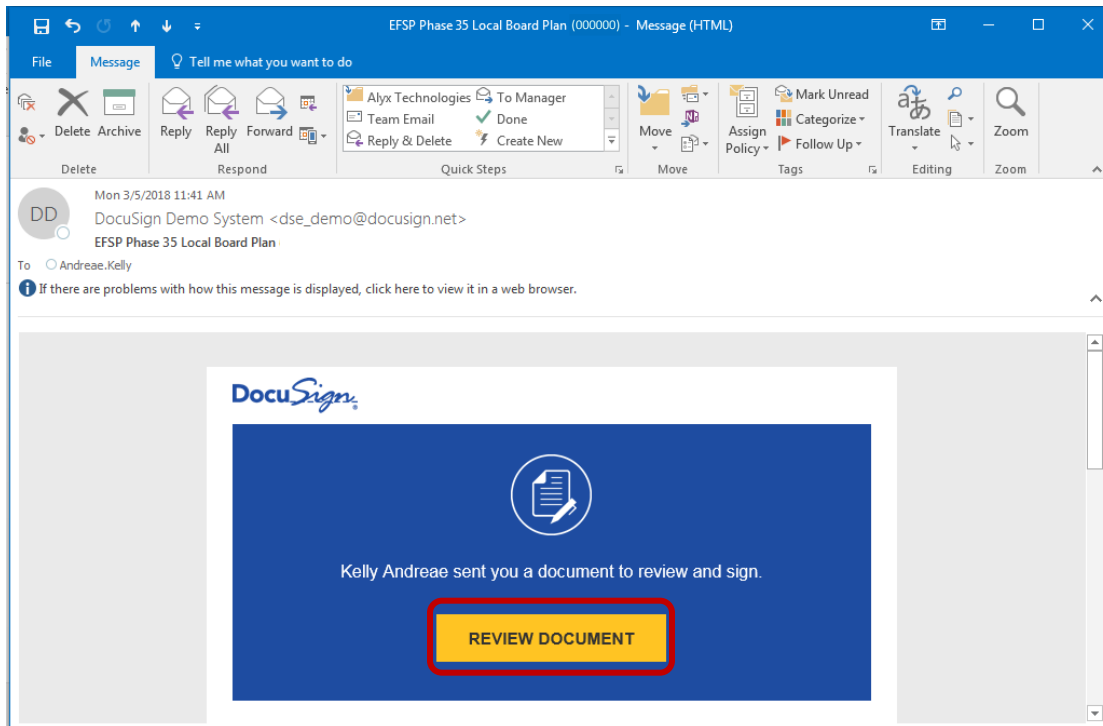
Reports >>

- [LRO Awards in Categories](#)
- [Program Overview](#)
- [Direct Award Letter](#)
- [Recommendation Letter](#)
- [LB Checklist](#)

E. Electronic Signature for Local Board Plan

After the Local Board submits the Local Board Plan, an email is sent to the Local Board Chair and other authorized signer email addresses on file for e-signing. **Please note that the Local Board Chair is required to sign this document.**

1. Review the DocuSign email.
Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



2. Agree to sign electronically.
Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.

Please Review & Act on These Documents



LB Chair
LB Name

EFSP has sent you a document to review and sign.
Request for eSignatures for your Local Board Plan. Your submission to the EFSP National Board is not complete until this
[View More](#)

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾

3. **Start the signing process**

Click the **Start** tag on the left to begin the signing process. You are taken to the first field requiring action.

Please review the documents below.

FINISH

OTHER ACTIONS ▾

START

DocuSign Envelope ID: 68FB3CF5-7746-4135-B708-7350AE55A07B

Emergency Food and Shelter Program
701 North Fairfax Street
Alexandria, VA 22314-2064
Phone 703-706-9660 Fax 703-706-9677

35-0000-00 Direct 1

Phase 35 Local Board Plan

Due date for submission: May 03, 2018

Jurisdiction: **Sample County, State** **Local Board ID# 0000-00** Award Amount: **\$12,676**
Phase 35 start date: 10/01/2017 **The administrative allowance of \$254 is included in the award amount.**
Local Board ID: 0000-00

Spending Period Extension Request If extension date is not selected, the end date for this spending period will be 10/31/2017.

<input type="checkbox"/> October 31, 2017	<input type="checkbox"/> November 30, 2017	<input type="checkbox"/> December 31, 2017	<input type="checkbox"/> January 31, 2018
<input type="checkbox"/> February 28, 2018	<input type="checkbox"/> March 31, 2018	<input type="checkbox"/> April 30, 2018	<input type="checkbox"/> May 31, 2018
<input type="checkbox"/> June 30, 2018	<input type="checkbox"/> July 31, 2018	<input type="checkbox"/> August 31, 2018	<input type="checkbox"/> September 30, 2018
<input type="checkbox"/> October 31, 2018	<input type="checkbox"/> November 30, 2018	<input type="checkbox"/> December 31, 2018	<input checked="" type="checkbox"/> January 31, 2019

The Local Board certifies that public notice of availability of these funds appeared in print in the **Local Newspaper** on **03/08/2018**.
The advertisement appeared at least 5 business days prior to our Local Board's allocation decision.
The Local Board will meet: **quarterly**. We understand that if meeting semiannually, copies of meeting minutes must be included with the Phase 35 Final Report.
Our Local Board does (copy attached) does not have additional requirements beyond those of the National Board (select one).

As the chair of the Local Board, I certify that the Local Board meets the requirements as stated on the Local Board Certification Form and that the above information and all information provided on the attached forms and via the EFSP website are correct. Our Local Board understands that all parties will be held accountable for complying with the provisions

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

Choose if your Local Board does or does not have additional requirements.

Select one radio button FINISH OTHER ACTIONS ▾

Phase 35 start date: 02/01/2018 The administrative expense of \$2,200 is included in the award amount.

Local Board ID:

Spending Period Extension Request If extension date is not selected, the end date for this spending period will be 10/31/2017.

<input type="checkbox"/> October 31, 2017	<input type="checkbox"/> November 30, 2017	<input type="checkbox"/> December 31, 2017	<input type="checkbox"/> January 31, 2018
<input type="checkbox"/> February 28, 2018	<input type="checkbox"/> March 31, 2018	<input type="checkbox"/> April 30, 2018	<input type="checkbox"/> May 31, 2018
<input type="checkbox"/> June 30, 2018	<input type="checkbox"/> July 31, 2018	<input type="checkbox"/> August 31, 2018	<input type="checkbox"/> September 30, 2018
<input type="checkbox"/> October 31, 2018	<input type="checkbox"/> November 30, 2018	<input type="checkbox"/> December 31, 2018	<input checked="" type="checkbox"/> January 31, 2019

The Local Board certifies that public notice of availability of these funds appeared in print in the **Local News** on **02/23/2018**. The advertisement appeared at least 5 business days prior to our Local Board's allocation decision. The Local Board will meet: **quarterly**. We understand that if meeting semiannually, copies of meeting minutes must be included with the Phase 35 Final Report.

Our Local Board does (copy attached) does not have additional requirements beyond those of the National Board (select one).

CHOOSE

As the chair of the Local Board, I certify that the Local Board meets the requirements as stated on the Local Board Certification Form and that the above information and all information provided on the attached forms and via the EFSP website are correct. Our Local Board understands that all parties will be held accountable for complying with the provisions of the grant as well as full compliance with applicable requirements of all other Federal laws, Executive Orders, regulations, and policies governing this program, including those not specifically stated in the Manual and the accompanying Phase 35 Addendum.

Signature of Local Board Chair: Date: 3/5/2018

Print Name of Local Board Chair: Board Chair

NOTE: Indicate below at least one alternate authorized signature which is acceptable for the processing of your jurisdiction's paperwork, i.e., Local Board Plans, Second Payment Requests, etc., to be used in the absence of the Local Board Chair. Alternate signatories must be members of the Local Board or the Local Board contact. Submission of any type of documentation from an unauthorized signer will not be processed.

DocuSign Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

If your Local Board does have additional requirements, please attach the Local Requirements by clicking on the paperclip.

Select one radio button FINISH OTHER ACTIONS ▾

Phase 35 start date: 02/01/2018 The administrative expense of \$2,200 is included in the award amount.

Local Board ID:

Spending Period Extension Request If extension date is not selected, the end date for this spending period will be 10/31/2017.

<input type="checkbox"/> October 31, 2017	<input type="checkbox"/> November 30, 2017	<input type="checkbox"/> December 31, 2017	<input type="checkbox"/> January 31, 2018
<input type="checkbox"/> February 28, 2018	<input type="checkbox"/> March 31, 2018	<input type="checkbox"/> April 30, 2018	<input type="checkbox"/> May 31, 2018
<input type="checkbox"/> June 30, 2018	<input type="checkbox"/> July 31, 2018	<input type="checkbox"/> August 31, 2018	<input type="checkbox"/> September 30, 2018
<input type="checkbox"/> October 31, 2018	<input type="checkbox"/> November 30, 2018	<input type="checkbox"/> December 31, 2018	<input checked="" type="checkbox"/> January 31, 2019

The Local Board certifies that public notice of availability of these funds appeared in print in the **Local News** on **02/23/2018**. The advertisement appeared at least 5 business days prior to our Local Board's allocation decision. The Local Board will meet: **quarterly**. We understand that if meeting semiannually, copies of meeting minutes must be included with the Phase 35 Final Report.

Our Local Board does (copy attached) does not have additional requirements beyond those of the National Board (select one).

NEXT

As the chair of the Local Board, I certify that the Local Board meets the requirements as stated on the Local Board Certification Form and that the above information and all information provided on the attached forms and via the EFSP website are correct. Our Local Board understands that all parties will be held accountable for complying with the provisions of the grant as well as full compliance with applicable requirements of all other Federal laws, Executive Orders, regulations, and policies governing this program, including those not specifically stated in the Manual and the accompanying Phase 35 Addendum.

Signature of Local Board Chair: Date: 3/5/2018

Print Name of Local Board Chair: Board Chair

NOTE: Indicate below at least one alternate authorized signature which is acceptable for the processing of your jurisdiction's paperwork, i.e., Local Board Plans, Second Payment Requests, etc., to be used in the absence of the Local Board Chair. Alternate signatories must be members of the Local Board or the Local Board contact. Submission of any type of documentation from an unauthorized signer will not be processed.

DocuSign Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

Click the **Sign** tag. You are asked to Adopt Your Signature.

Select the sign field to create and add your signature. **FINISH** OTHER ACTIONS ▾

The Local Board certifies that public notice of availability of these funds appeared in print in the **Local News** on **02/23/2018**. The advertisement appeared at least 5 business days prior to our Local Board's allocation decision. The Local Board will meet: **quarterly**. We understand that if meeting semiannually, copies of meeting minutes must be included with the Phase 35 Final Report.

Our Local Board does (copy attached) does not have additional requirements beyond those of the National Board (select one).

As the chair of the Local Board, I certify that the Local Board meets the requirements as stated on the Local Board Certification Form and that the above information and all information provided on the attached forms and via the EFSP website are correct. Our Local Board understands that all parties will be held accountable for complying with the provisions of the grant as well as full compliance with applicable requirements of all other Federal laws, Executive Orders, regulations, and policies governing this program, including those not specifically stated in the Manual and the accompanying Phase 35

SIGN (Required - Sign Here) Sign Date: 3/5/2018

Signature of Local Board Chair

Print Name of Local Board Chair: Board Chair

Not for public release. This document contains information that is exempt from public release under the processing of your jurisdiction's paperwork, i.e., Local Board Plans, Second Payment Requests, etc., to be used in the absence of the Local Board Chair. Alternate signatories must be members of the Local Board or the Local Board contact. Submission of any type of documentation from an unauthorized signer will not be processed.

Print Name _____ Print Name _____
Signature _____ Signature _____
Position with Local Board _____ Position with Local Board _____

DocuSign Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

4. Verify your name.

Verify that your name and initials are correct. If not, change them as needed.

Adopt Your Signature

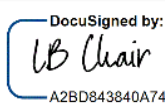

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW Change Style

DocuSigned by:  
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

5. **Adopt a signature.** Do **one** of the following:
 1. Accept the default signature and initial style.
 2. Click **Change Style**, and select a signature option.
 3. Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

Adopt Your Signature

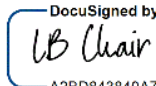

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

[SELECT STYLE](#) **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:
 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

6. Save your signature.

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Adopt Your Signature

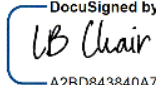

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

[SELECT STYLE](#) DRAW

PREVIEW [Change Style](#)

DocuSigned by:
 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

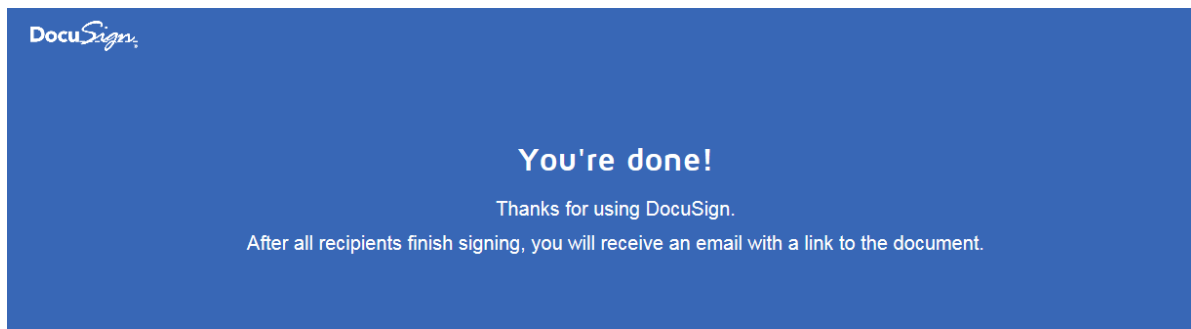
ADOPT AND SIGN CANCEL

7. Confirm signing.

When you finish clicking all signature tags in the document, confirm signing by clicking **Finish**.

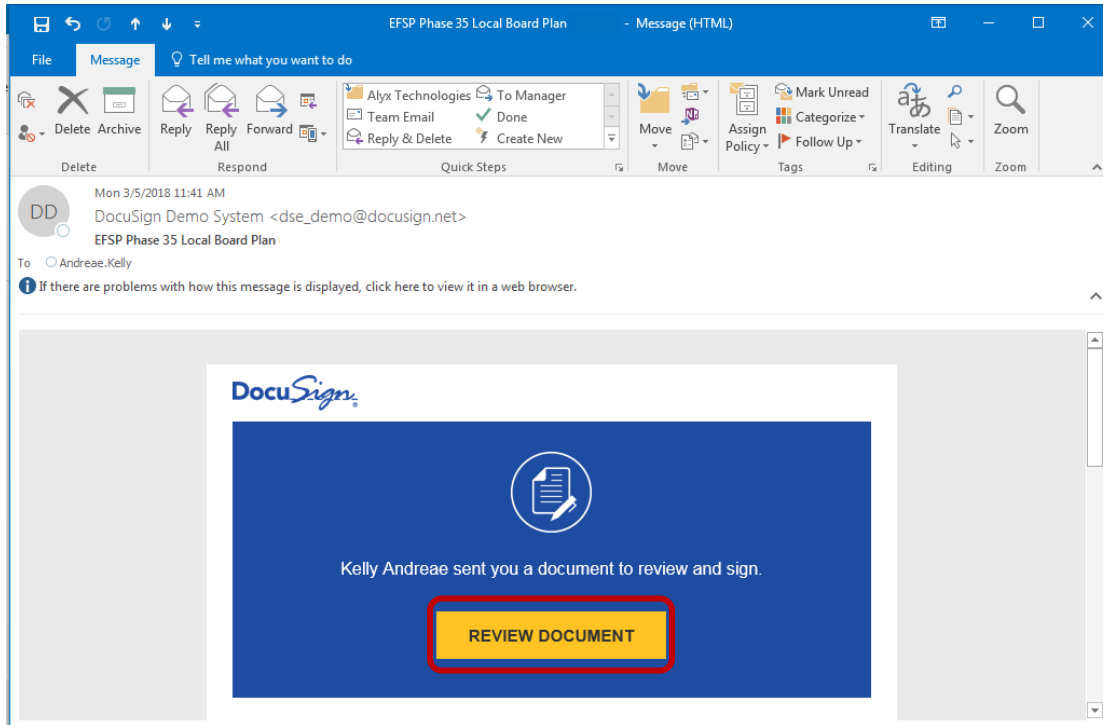
You are given the option to log into DocuSign. This is NOT required for EFSP. Click the **X** in the **right-hand corner**, unless you have an existing account you would like to connect to.

A message appears stating that you have completed your document.

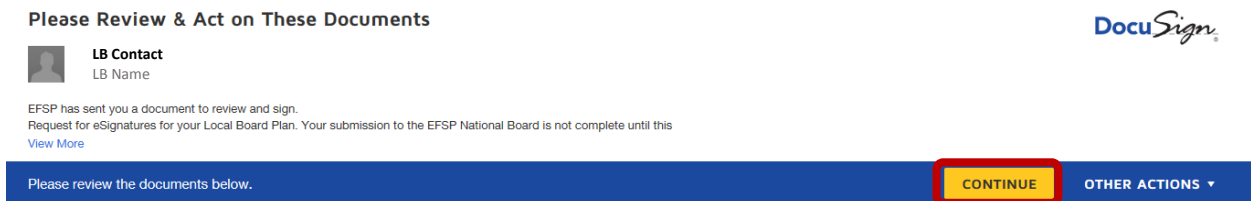


After the Local Board Chair signs, the Local Board Plan will be sent to any alternative signer to sign.

8. Review the DocuSign email.
Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



9. Agree to sign electronically.
Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.



10. Start the signing process.

Click the **Start** tag on the left to begin the signing process. You are taken to the first field requiring action.

Please review the documents below. **FINISH** OTHER ACTIONS ▾

Emergency Food and Shelter Program
701 North Fairfax Street
Alexandria, VA 22314-2064
Phone 703-706-9660 Fax 703-706-9677

35-0000-00 Direct 1

Phase 35 Local Board Plan

Due date for submission: May 03, 2018

Jurisdiction: **Sample County, State** Local Board ID# 0000-00 Award Amount: **\$12,676**
Phase 35 start date: 10/01/2017 The administrative allowance of \$254 is included in the award amount.

Local Board ID: 0000-00

Spending Period Extension Request If extension date is not selected, the end date for this spending period will be 10/31/2017.

<input type="checkbox"/> October 31, 2017	<input type="checkbox"/> November 30, 2017	<input type="checkbox"/> December 31, 2017	<input type="checkbox"/> January 31, 2018
<input type="checkbox"/> February 28, 2018	<input type="checkbox"/> March 31, 2018	<input type="checkbox"/> April 30, 2018	<input type="checkbox"/> May 31, 2018
<input type="checkbox"/> June 30, 2018	<input type="checkbox"/> July 31, 2018	<input type="checkbox"/> August 31, 2018	<input type="checkbox"/> September 30, 2018
<input type="checkbox"/> October 31, 2018	<input type="checkbox"/> November 30, 2018	<input type="checkbox"/> December 31, 2018	<input checked="" type="checkbox"/> January 31, 2019

The Local Board certifies that public notice of availability of these funds appeared in print in the **Local Newspaper on 03/08/2018**.
The advertisement appeared at least 5 business days prior to our Local Board's allocation decision.
The Local Board will meet: **quarterly**. We understand that if meeting semiannually, copies of meeting minutes must be included with the Phase 35 Final Report.

Our Local Board does (copy attached) does not have additional requirements beyond those of the National Board (select one).

As the chair of the Local Board, I certify that the Local Board meets the requirements as stated on the Local Board Certification Form and that the above information and all information provided on the attached forms and via the EFSP website are correct. Our Local Board understands that all parties will be held accountable for complying with the provisions

DocuSign | Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

Click the **Sign** tag. You are asked to Adopt Your Signature.

Select the sign field to create and add your signature. **FINISH** OTHER ACTIONS ▾

DocuSigned by:
Signature of Local Board Chair: Board Chair Date: 3/13/2018
C32F02534F874ED...

Print Name of Local Board Chair: Board Chair

NOTE: Indicate below at least one alternate authorized signature which is acceptable for the processing of your jurisdiction's paperwork, i.e., Local Board Plans, Second Payment Requests, etc., to be used in the absence of the Local Board Chair. Alternate signatories must be members of the Local Board or the Local Board contact. Submission of any type of documentation from an unauthorized signer will not be processed.

Board Contact	_____	Print Name	_____
Print Signature	_____	Signature	_____
Signature	_____	Position with Local Board	_____
Position with Local Board	_____		

National Board use only: Cert _____ Adv _____ Sig _____ R _____ NA _____ H _____ Initials _____ K _____ E _____

35-003400-LBP.pdf 1 of 3

DEMONSTRATION DOCUMENT ONLY

DocuSign | Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

11. **Verify your name.**

Verify that your name and initials are correct. If not, change them as needed.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:
Board Contact
A2BD843840A74C8... ^{DS}
BC

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

12. **Adopt a signature.** Do one of the following:

1. Accept the default signature and initial style.
2. Click **Change Style**, and select a signature option.
3. Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:
Board Contact
A2BD843840A74C8... ^{DS}
BC

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

13. Save your signature.

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:
Board Contact ^{DS}
A2BD843840A74C8... *BC*

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

14. Confirm signing.

When you finish clicking all signature tags in the document, confirm signing by clicking **Finish**.

Done! Select Finish to send the completed document.

FINISH OTHER ACTIONS ▾

Barbour County, AL, Local Board LBP 0034-00

Signature of Local Board Chair: *Board Chair* DocuSigned by: *Board Chair* Date: 3/13/2018
C32F02034F8748D...

Print Name of Local Board Chair: Board Chair

NOTE: Indicate below at least one alternate authorized signature which is acceptable for the processing of your jurisdiction's paperwork, i.e., Local Board Plans, Second Payment Requests, etc., to be used in the absence of the Local Board Chair. Alternate signatories must be members of the Local Board or the Local Board contact. Submission of any type of documentation from an unauthorized signer will not be processed.

Board Contact	_____	Print Name	_____
<i>Board Contact</i>	_____	Signature	_____
Contact	_____	Position with Local Board	_____

Position with Local Board

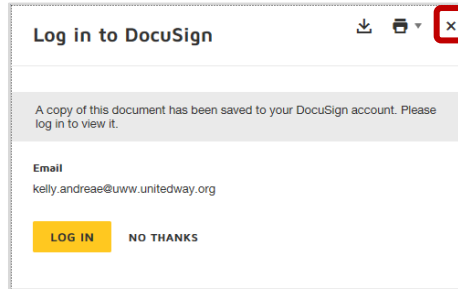
National Board use only: Cert _____ Adv _____ Sig _____ R _____ NA _____ H _____ Initials _____ K _____ E _____

35-003400-LBP.pdf 1 of 3

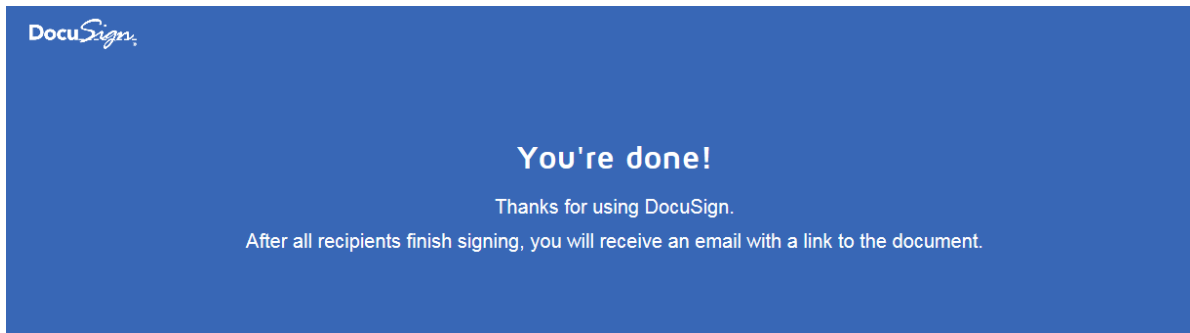
DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN.COM FOR DEMONSTRATION PURPOSES

DocuSign | Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

You are given the option to log into DocuSign. This is NOT required for EFSP. Click the **X** in the **right-hand corner**, unless you have an existing account you would like to connect to.

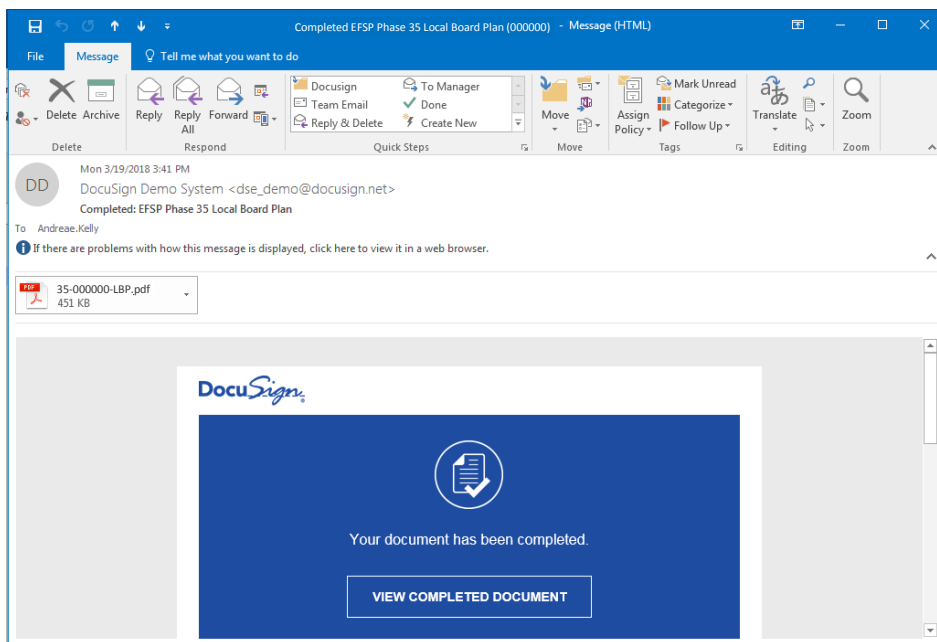


A message appears stating that you have completed your document.



A completed copy will be emailed to all signers and the LB Contact (if not a signer) once all signers have signed. You will be able to download a PDF copy or print a copy of the document on the EFSP website.

After the Local Board Plan has been submitted and signed by all signers, LROs will receive an email notice of their award with instructions to log into the EFSP website to sign the required certifications. The Local Board Contact will receive email copies of the certifications once they have been signed.



Reallocation

Within a Phase, the Local Board can reallocate funds from one LRO or more LROs to one or multiple LROs.

LBs can reallocate funds from one LRO or more LROs to one or multiple LROs (e.g. from LRO 1 to LRO 2) within the Phase. Reallocations between LROs can be done at any time during the Phase (once a board plan has been received and processed).

LB may receive four different types of awards in a Phase. They could potentially receive more than one type of award in a Phase.

- **Direct:** Directly funded by National Board.
- **SSA:** Directly funded by National Board.
- **National Board Reallocation:** Reallocation of additional National Board funds to LB/SSA.
- **SSA Reallocation:** Reallocation of SSA funds to LBs.

The Local Board will reallocate funds from one LRO to other by adding and subtracting amount from the allocation.

Reallocation requests will be transmitted/submitted from Local Boards to EFSP. EFSP will review and submit approval or disapproval to the Local Board. Only after EFSP approves, reallocations will be reflected on the EFSP system.

LBs cannot reallocate funds after the Final Report has been received and processed by EFSP.

Requests from LBs can be for a **Local** reallocation (Payment have been issued to an LRO from EFSP and a check will be written between the LROs to move the money).

Requests from LBs can be for a **National** reallocation (EFSP still has the money to pay out to the designated LRO or LROs).

Reallocations to new LROs, (those not funded on the original board plan submitted to the National Board) cannot be made after the set deadline during the Phase. EFSP decides the deadline date and if any exceptions are required, staff will decide on an individual basis per LB requests.

If an LRO was initially allocated \$500 on the board plan received from the LB, they may receive funds via a reallocation in a smaller dollar amount but if an LRO is receiving funds for the first time as part of a reallocation, the smallest dollar amount that can be given is \$500, unless it is to be used for administration (can be less than the minimum).

Reallocation

In the Reallocation main-menu Chair/Contact Person of the Local Board can create, modify, delete and submit Reallocation Request EFSP.

In addition, in **Reallocation** main-menu Chair/Contact Person/Roster can view/print **LB Reallocation Request** details of any Phase.

A. View/ Print Previous Phase's Reallocation Request

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

The screenshot shows the 'LB Reallocation' interface. At the top, there is a blue header with the text 'LB Reallocation'. Below the header, on the left, is a 'Select Phase' dropdown menu with '28' selected. To its right is a button labeled 'New Reallocation Request'. In the center, there is a search box labeled 'Select Phase to view Reallocations :' with '28' selected. Below this is a table with the following columns: 'Reallocation From', 'Reallocation To', 'Reallocation Type', 'Reallocation Date', 'Reallocation Amount', 'Status', 'Action', and 'View'. The table contains a single row with the text 'No Reallocations found for Phase-28'.

2. Select Phase from the **Select Phase to view Reallocations** drop-down box.

***Note:** LB Reallocation Request details can be viewed for any Phase. The default Phase will always be the Current Phase.*

3. Reallocation details for the selected Phase appears in the grid.

The screenshot shows the 'LB Reallocation' interface with phase 22 selected. The 'Select Phase' dropdown menu shows '22' and the search box also shows '22'. The table below has the following data:

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
012	007	National	10/25/2004	\$865.00	Approved		

4. Click on the pdf icon under **View**.
Reallocation Request report gets generated.

B. Add a new Reallocation Request

NATIONAL REALLOCATION

Condition:

- Board Plan must have been keyed and posted.
- Payment has not been done to LRO (i.e. only funds are allocated to LRO).

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

LB Reallocation

Select Phase

28 ▼

New Reallocation Request

Select Phase to view Reallocations : 28 ▼

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
No Reallocations found for Phase-28							

2. Select Phase from the **Select Phase** drop-down box.

***Note:** Reallocation request is submitted for Current Phase only. The default Phase will always be the Current Phase.*

3. Click the **New Reallocation Request** button.
Reallocation (Phase -#) screen appears.

***Note:** If a Reallocation Request is created/ submitted to EFSP for approval then a new Reallocation Request cannot be created. A pop-up message appears that says, "Reallocation request already exists for the Current phase! Once it is approved, then you can create a new reallocation request. Click the **OK** button.*

Reallocation (Phase-28)

LB No.

004400

LB Name

Calhoun County

Reallocation Date

10/04/2010

Type of Reallocation

Local
 National

Balance of Changes

0.00

LRO No. 001 - Salvation Army, The ▼

	Categories	Awarded	Reallocate		
(1)	Served Meals	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	Amount Remaining	<input style="width: 80px;" type="text" value="0.00"/>
(2)	Other Foods	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	Amount Received	<input style="width: 80px;" type="text" value="0.00"/>
(3)	Mass Shelter	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	2 nd Check Requested	<input style="width: 80px;" type="text"/>
(4)	Other Shelter	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	Payments Received	<input style="width: 80px;" type="text" value="0"/>
(5)	Rent / Mortgage	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>		
(6)	Supplies / Equipment	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	<input type="button" value="Use Returns"/>	<input type="button" value="First LRO"/>
(7)	Rehabilitation	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	<input type="button" value="Save"/>	<input type="button" value="Prev LRO"/>
(8)	Utility Assistance	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	<input type="button" value="Post Changes"/>	<input type="button" value="Next LRO"/>
(9)	Administration	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>	<input type="button" value="Close"/>	<input type="button" value="Last LRO"/>
	Total Expended	<input style="width: 80px;" type="text" value="0.00"/>	<input style="width: 80px;" type="text" value="0.00"/>		

4. Select the desired LROs (from whom the fund has to be reallocated) from the **LRO** drop-down box.
OR
Select the desired LRO by clicking on **First LRO/Prev LRO/Next LRO/Last LRO** buttons.
5. Select the **Type of Reallocation** as National by checking the **National** radio button.

To reallocate fund from one LRO to another LRO, you need to first subtract the amount from the corresponding categories for which the LRO has been allocated fund for.

If the LRO has not been allocated fund for a category (Awarded field is 0) then Reallocation cannot be done for that category. In this case, a message appears on the screen in red color that says, **“The amount you have reallocated is greater than the amount remaining!”** Suppose Reallocation amount is \$500.

6. Enter -500 in the **Reallocate** field against the desired category and click outside the grid.

Note:

- *Reallocation amount should not be more than Awarded amount for the selected category, otherwise a popup message appears that says, “Reallocate amount should not be more than awarded amount for Other Foods.” Click the **OK** button and enter the amount again.*
- *The **Amount remaining** field shows the amount which is available with the LRO. Once Reallocation is done **Amount remaining** field gets added/ subtracted with the reallocation amount.*

7. Click the **Save** button.
Balance of changes field reflects -500.

Reallocation (Phase-28)							
LB No.	004400	LB Name	Calhoun County				
Reallocation Date	10/04/2010	Type of Reallocation	<input type="radio"/> Local	<input checked="" type="radio"/> National	Balance of Changes	-500.00	
LRO No.	001 - Salvation Army, The						
	Categories	Awarded	Reallocate				
(1)	Served Meals	0.00	0.00	Amount Remaining	30,000.00		
(2)	Other Foods	0.00	0.00	Amount Received	0.00		
(3)	Mass Shelter	0.00	0.00	2 nd Check Requested			
(4)	Other Shelter	0.00	0.00	Payments Received	0		
(5)	Rent / Mortgage	0.00	0.00	<input type="button" value="Use Returns"/> <input type="button" value="First LRO"/>			
(6)	Supplies / Equipment	30,000.00	-500.00			<input type="button" value="Save"/>	<input type="button" value="Prev LRO"/>
(7)	Rehabilitation	0.00	0.00			<input type="button" value="Post Changes"/>	<input type="button" value="Next LRO"/>
(8)	Utility Assistance	0.00	0.00			<input type="button" value="Close"/>	<input type="button" value="Last LRO"/>
(9)	Administration	0.00	0.00				
	Total Expended	30,000.00	-500.00				

8. Select the desired LRO (to whom funds has to be reallocated) from the **LRO No** drop-down box.
OR
Select the desired LRO by clicking on **First LRO/Prev LRO/Next LRO/Last LRO** buttons.

Note: While navigating through the LRO(s) pages,

- If you go to the deleted LRO page then you will find **LRO Deleted** in red color text.
- If you go to LRO who has an Open Hold then a pop-up message appears that says, "This LRO has an open hold! Review before permitting the reallocation". Click **OK** button to proceed.

9. Enter 500 in the **Reallocate** fields against the desired categories and click outside the grid.
10. Click the **Save** button.
Balance of changes field becomes 0.
11. Click the **Post Changes** button.
A pop-up message appears that says, "Reallocation done successfully."
12. Click the **OK** button.
LB Reallocation screen appears with the New Reallocation Request details.

LB Reallocation

Select Phase 28 ▾ New Reallocation Request

Select Phase to view Reallocations : 28 ▾

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
001	005	National	10/04/2010	\$500.00		Modify / Delete / Submit to EFSP	

13. Click on pdf icon under **View** to view/print the **Reallocation Report**.

NATIONAL REALLOCATION WHEN LRO HAS RETURNED THE FUND

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

LB Reallocation

Select Phase 28 ▾ New Reallocation Request

Select Phase to view Reallocations : 28 ▾

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
No Reallocations found for Phase-28							

2. Select Phase from the **Select Phase** drop-down box.

Note: Reallocation request is submitted for Current Phase only. The default Phase will always be the Current Phase.

- Click the **New Reallocation Request** button.
Reallocation (Phase -#) screen appears.

Note: If a Reallocation Request is created/ submitted to EFSP for approval then a new Reallocation Request cannot be created.. In this case, a pop-up message appears that says, “Reallocation request already exists for the Current phase! Once it is approved, then you can create a new reallocation request. Click the **OK** button.

Reallocation (Phase-28)					
LB No.	004400	LB Name	Calhoun County		
Reallocation Date	10/04/2010	Type of Reallocation	<input checked="" type="radio"/> Local	<input type="radio"/> National	Balance of Changes 0.00
LRO No.	001 - Salvation Army, The				

	Categories	Awarded	Reallocate		
(1)	Served Meals	0.00	0.00	Amount Remaining	30,000.00
(2)	Other Foods	0.00	0.00	Amount Received	0.00
(3)	Mass Shelter	0.00	0.00	2 nd Check Requested	
(4)	Other Shelter	0.00	0.00	Payments Received	0
(5)	Rent / Mortgage	0.00	0.00	<input type="button" value="Use Returns"/> <input type="button" value="Save"/> <input type="button" value="Post Changes"/> <input type="button" value="Close"/>	<input type="button" value="First LRO"/> <input type="button" value="Prev LRO"/> <input type="button" value="Next LRO"/> <input type="button" value="Last LRO"/>
(6)	Supplies / Equipment	30,000.00	0.00		
(7)	Rehabilitation	0.00	0.00		
(8)	Utility Assistance	0.00	0.00		
(9)	Administration	0.00	0.00		
	Total Expended	30,000.00	0.00		

- Select the desired LROs (from whom the fund has to be reallocated) from the **LRO** drop-down box.
OR
Select the desired LRO by clicking on **First LRO/Prev LRO/Next LRO/Last LRO** buttons.
- Select the **Type of Reallocation** as National by checking the **National** radio button.

To reallocate fund from one LRO to another LRO, you need to first subtract the amount from the corresponding categories for which the LRO has been allocated fund for.

If the LRO has not been allocated fund for a category (Awarded field is 0) then Reallocation cannot be done for that category. In this case, a message appears on the screen in red color that says, “**The amount you have reallocated is greater than the amount remaining!**”

Suppose Reallocation amount is \$500.

- Enter -500 in the **Reallocate** field against the desired category and click outside the grid.

Note:

- Reallocation amount should not be more than Awarded amount for the selected category, otherwise a popup message appears that says, “Reallocate amount should not be more than awarded amount for Other Foods.” Click the **OK** button and enter the amount again.
- The **Amount Remaining** field shows the amount which is available with the LRO. Once Reallocation is done Amount remaining field gets added/ subtracted with the reallocation amount.

7. Click the **Save** button.
Balance of changes field reflects -500.
8. Click the **Use Returns** button.
Use Returned Funds for Reallocation window appears.

9. Check the check-box under **Select**.
10. Click the **OK** button.
11. Select the desired LRO number (to whom funds has to be reallocated) from the **LRO No** drop-down box.
OR
Select the desired LRO by clicking on **First LRO/Prev LRO/Next LRO/Last LRO** buttons.

Note: While navigating through the LRO(s) pages,

- If you go to the deleted LRO page then you will find **LRO Deleted** in red color text.
- If you go to LRO who has an Open Hold then a pop-up message appears that says, "This LRO has an open hold! Review before permitting the reallocation". Click **OK** button to proceed.

12. Enter 500 in the **Reallocate** fields against the desired categories.
13. Click the **Save** button.
The amount in the field **Balance of changes** becomes 0.
14. Click the **Post Changes** button.
A pop-up message appears that says, "Reallocation done successfully."
15. Click the **OK** button.
LB Reallocation screen appears with appears New Reallocation Request details.
16. Click on pdf icon under **View** to view/print the **Reallocation Report**.

LOCAL REALLOCATION

Condition:

- Board Plan must have been keyed and posted.
- Payment has been done to LRO.
- Request for Reallocation should have been received.

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
No Reallocations found for Phase-28							

2. Select Phase from the **Select Phase** drop-down box.

Note: *Reallocation request is submitted for Current Phase only. The default Phase will always be the Current Phase.*

3. Click the **New Reallocation Request** button.

Note: If a Reallocation Request is created/submitted to EFSP for approval then a new Reallocation Request cannot be created. In this case, a pop-up message appears that says, "Reallocation request already exists for the Current phase! Once it is approved, then you can create a new reallocation request. Click the **OK** button.

Reallocation (Phase-28)					
LB No.	<input type="text" value="004400"/>	LB Name	<input type="text" value="Calhoun County"/>		
Reallocation Date	<input type="text" value="10/04/2010"/>	Type of Reallocation	<input checked="" type="radio"/> Local	<input type="radio"/> National	Balance of Changes <input type="text" value="0.00"/>
LRO No.	<input type="text" value="001 - Salvation Army, The"/>				

	Categories	Awarded	Reallocate		
(1)	Served Meals	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Amount Remaining	<input type="text" value="0.00"/>
(2)	Other Foods	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Amount Received	<input type="text" value="0.00"/>
(3)	Mass Shelter	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	2 nd Check Requested	<input type="text"/>
(4)	Other Shelter	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	Payments Received	<input type="text" value="0"/>
(5)	Rent / Mortgage	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>		
(6)	Supplies / Equipment	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Use Returns"/>	<input type="button" value="First LRO"/>
(7)	Rehabilitation	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Save"/>	<input type="button" value="Prev LRO"/>
(8)	Utility Assistance	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Post Changes"/>	<input type="button" value="Next LRO"/>
(9)	Administration	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="button" value="Close"/>	<input type="button" value="Last LRO"/>
	Total Expended	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>		

- Select the desired LROs (from whom the fund has to be reallocated) from the LRO No. drop-down box.
OR

Select the desired LRO by clicking on **First LRO/Prev LRO/Next LRO/Last LRO** buttons.

- Select the **Type of Reallocation** as Local by checking the **Local** radio button.
To reallocate fund from one LRO to another LRO, you need to first subtract the amount from the corresponding categories).

Suppose Reallocation amount is \$500.

- Enter -500 in the Reallocate field against the category.
- Click the **Save** button.

Balance of changes field reflects -500.

Reallocation (Phase-28)				
LB No.	004400	LB Name	Calhoun County	
Reallocation Date	10/04/2010	Type of Reallocation	<input checked="" type="radio"/> Local <input type="radio"/> National	Balance of Changes
LRO No.	002 - Jacksonville Community Chest			
	Categories	Awarded	Reallocate	
(1)	Served Meals	0.00	0.00	Amount Remaining 15,000.00
(2)	Other Foods	0.00	0.00	Amount Received 15,000.00
(3)	Mass Shelter	0.00	0.00	2 nd Check Requested
(4)	Other Shelter	30,000.00	-500.00	Payments Received 1
(5)	Rent / Mortgage	0.00	0.00	<input type="button" value="Use Returns"/> <input type="button" value="First LRO"/> <input type="button" value="Save"/> <input type="button" value="Prev LRO"/> <input type="button" value="Post Changes"/> <input type="button" value="Next LRO"/> <input type="button" value="Close"/> <input type="button" value="Last LRO"/>
(6)	Supplies / Equipment	0.00	0.00	
(7)	Rehabilitation	0.00	0.00	
(8)	Utility Assistance	0.00	0.00	
(9)	Administration	0.00	0.00	
	Total Expended	30,000.00	-500.00	

- Select the desired LRO (to whom funds has to be reallocated) from the **LRO No** drop-down box.
OR
Select the desired LRO by clicking on **First LRO/Prev LRO/Next LRO/Last LRO**.

Note: While navigating through the LRO(s) pages:

- If you go to the deleted LRO page then you will find **LRO Deleted** in red color text.
- If you go to LRO who has an Open Hold then a pop-up message appears that says, "This LRO has an open hold! Review before permitting the reallocation". Click **OK** button to proceed.

- Enter 500 in the **Reallocate** field to the corresponding categories.
- Click the **Save** button.

Balance of changes field becomes 0.


Reallocation (Phase-28)					
LB No.	004400	LB Name	Calhoun County		
Reallocation Date	10/04/2010	Type of Reallocation	<input checked="" type="radio"/> Local	<input type="radio"/> National	Balance of Changes 0.00
LRO No.	005 - Anniston Soup Bowl, Inc.				
	Categories	Awarded	Reallocate		
(1)	Served Meals	0.00	0.00	Amount Remaining	0.00
(2)	Other Foods	0.00	500.00	Amount Received	0.00
(3)	Mass Shelter	0.00	0.00	2 nd Check Requested	
(4)	Other Shelter	0.00	0.00	Payments Received	0
(5)	Rent / Mortgage	0.00	0.00	<input type="button" value="Use Returns"/> <input type="button" value="First LRO"/> <input type="button" value="Save"/> <input type="button" value="Prev LRO"/> <input type="button" value="Post Changes"/> <input type="button" value="Next LRO"/> <input type="button" value="Close"/> <input type="button" value="Last LRO"/>	
(6)	Supplies / Equipment	0.00	0.00		
(7)	Rehabilitation	0.00	0.00		
(8)	Utility Assistance	0.00	0.00		
(9)	Administration	0.00	0.00		
Total Expended		0.00	500.00		

11. Click the **Post Changes** button.

A pop message appears that says, "Reallocation done successfully."

12. Click the **OK** button.

13. **LB Reallocation** screen appears with the New Reallocation Request details.

LB Reallocation							
Select Phase :	28	<input type="button" value="New Reallocation Request"/>					
Select Phase to view Reallocations : 28							
Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
001	002	Local	09/09/2010	\$500.00		Modify / Delete / Submit to EFSP	

14. Click on pdf icon under **View** to view/print the **Reallocation Report**.

C. Modify Reallocation Request

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

LB Reallocation

Select Phase:

Select Phase to view Reallocations :

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
001	005	National	10/04/2010	\$500.00		Modify / Delete / Submit to EFSP	

2. Select the Reallocation Request from the grid.
3. Click on **Modify** link under **Action**.
Reallocation (Phase#) screen appears.
4. Modify the Reallocation Request.
5. Click the **Save** button.
6. Click the **Post Changes** button.
A pop-up message appears that says, “Reallocation done successfully”.
7. Click the **OK** button.
LB Reallocation screen appears with modified Reallocation Request.


D. Delete Reallocation Request

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

LB Reallocation

Select Phase:

Select Phase to view Reallocations :

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
001	005	National	10/04/2010	\$500.00		Modify / Delete / Submit to EFSP	

2. Select the Reallocation Request from the grid.
3. Click on **Delete** link under **Action**.
A pop-up message appears that says, “Are you sure to delete this reallocation?”
4. Click the **OK** button.
A pop-up message appears that says, “Reallocation deleted successfully”.
5. Click the **OK** button.

E. Submit Reallocation Request to EFSP

1. Click on **Reallocation** on the main-menu.
LB Reallocation screen appears.

LB Reallocation

Select Phase 28 ▼ New Reallocation Request

Select Phase to view Reallocations : 28 ▼

Reallocation From	Reallocation To	Reallocation Type	Reallocation Date	Reallocation Amount	Status	Action	View
001	005	National	10/04/2010	\$500.00		Modify / Delete / Submit to EFSP	

2. Select the Reallocation Request from the grid.
3. Click on Submit to EFSP link under **Action**.
A pop-up message appears that says, “Are you sure to submit this reallocation to EFSP?”
4. Click the **OK** button.
A pop-up message appears that says, Reallocation submitted to EFSP successfully”.
5. Click the **OK** button.
LB Reallocation screen appears with the Reallocation Request’s **Status** as ‘**Pending**’ and **Action** as **Submitted to EFSP**’.

IF EFSP DISAPPROVES THE REALLOCATION REQUEST

If Reallocation Request is disapproved by EFSP, then the **Status** appears as **Disapproved** and **Action** as **Modify/Submit to EFSP**.

1. Click on the View Comments link.
Reallocation Disapproval Comments window appears.
2. Click the **Close** button.
3. Click on the Modify link to modify and resubmit Reallocation Request to EFSP.
Reallocation (Phase#) screen appears.
4. Modify the Reallocation.
5. Click the **Save** button.
6. Click the **Post Changes** button.
A pop-up message appears that says, “Reallocation done successfully?”
7. Click the **OK** button.
LB Reallocation screen appears.
8. Click on Submit to EFSP link under **Action**.
A pop-up message appears that says, “Are you sure to submit this reallocation to EFSP.”
9. Click the **OK** button.
A pop-up message appears that says, “Reallocation submitted to EFSP successfully.”
10. Click the **OK** button.
LB Reallocation screen appears with the Reallocation Request’s **Status** as **Pending** and **Action** as **Submitted to EFSP**.

IF EFSP APPROVES THE REALLOCATION REQUEST

If the Reallocation Request is approved by EFSP then Reallocation Request’s **Status** becomes **Approved**.

Interim Report and Second Payment

In **Interim & 2nd Pymt** main-menu, Chair/Contact Person can:

- Key/modify Interim Report and Second Request
- Disapprove Interim Report and Second Payment Request submitted by LRO from Website
- Print Interim Report and Second Payment Request

1. Key/Modify Interim Report

Note: *Interim Reports are keyed for those LRO who manually submitted their Interim Report or those who did not report.*

1. Click on **Interim & 2nd Pymt** on the main-menu.

Welcome : LB Chair (LB.000000)

Emergency Food and Shelter National Board Program

Home | Sign Out

EFSP

- EFSP Website Guide
- LB Policy Papers
- Forms
- DUNS
- Reports
- Board Plan
- Reallocation
- Interim & 2nd Pymt**
- Final Report
- Variations
- Roster
- Manage LB Members
- Manage LRO
- Change Password
- Training Workshops
- What Makes Sense; What Works
- Key Program Dates
- Quick Reference Guides
- EFSP Manual
- Key Changes And Clarifications
- Addendum To Program Manual

Item No. Phase 33 & 34 Clarifications User Instructions

1 **Phases 33 and 34 Local Board Plan Submission Deadline (as of 10/15/2017)**
 The National Board will continue to accept Local Board Plans for Phases 33 and 34 allocations. There is no penalty for submitting the plan late. However, the delay in submission of the Local Board Plan will cause delay in the processing and approving of the plan to release funds to LROs. EFSP staff is available to assist Local Boards with their Local Board Plans as needed. Please call 703-706-9660 for assistance.
IMPORTANT: Please note, the latest date LROs may spend funds is January 31, 2018. The jurisdiction's spending end date is determined by the Local Board.

2 **PHASE 33 FINAL REPORTS (as of 7/12/2017)**
 The Emergency Food and Shelter Program (EFSP) provided a deadline for submission of Final Reports for Phase 33 when award announcements were made in July 2016. The deadline was provided in the EFSP Key Changes Program Clarifications and Reminders document and Key Program Dates document, which are accessible on the EFSP website. However, given spending period extension to January 31, 2018 to allow LROs time to thoughtfully spend funds in their communities, Phase 33 funding continues to be issued and Phase 33 Final Reports have been delayed. Phase 33 Final Reports will be submitted together with Phase 34 Final Reports. More detail regarding Phase 33 Final Reports and the new due date for submission to the National Board will be provided at a later time.
 If you have questions regarding this message, please contact the staff at efsp@uww.unitedway.org or 703-706-9660.

3 **Important Message Regarding Submission of Forms (as of 6/29/2017)**
 When submitting required forms and certifications to the Emergency Food and Shelter Program (EFSP), please ensure the entire form is visible in your submission. Based on guidance received from our auditors, EFSP cannot accept partial forms (i.e. forms are cut off). Please take extra care to ensure forms do not get cut off in the scanning process. Staff will process submissions as quickly and efficiently as possible. Please note, the receipt of partial information will cause a delay in the release of funds to LROs.

Interim Report and Second Payment Request screen appears with all the LROs whose First Payment is made in the Current Phase and their Interim Report status details in the grid.

Welcome : LB Chair (LB.000000)

Emergency Food and Shelter National Board Program

Home | Sign Out

EFSP

- EFSP Website Guide
- LB Policy Papers
- Forms
- DUNS
- Reports
- Board Plan
- Reallocation
- Interim & 2nd Pymt**
- Final Report
- Variations
- Roster
- Manage LB Members

Interim Report and Second Payment Request

Phase: Total Awarded: \$200,000.00 Total Received: \$93,750.00

Key Interim Disapprove Interim View Interim Graph (in Categories)

LRO...	LRO Name	Award Amount	Received Amount	Payment Request	Submitted By (LB/LRO)	Status
002	Catholic Charities CYO	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
003	Central City Hospitality House	\$12,500.00	\$6,250.00	\$6,250.00	LRO	Approved
004	Dolores Street Community Servic...	\$14,000.00	\$7,000.00	\$7,000.00	LB	Approved
006	Episcopal Community Services	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
008	Hamilton Family Center, The	\$10,000.00	\$5,000.00	\$5,000.00	LRO	Pending
011	La Casa De Las Madres	\$17,000.00	\$3,250.00	\$13,750.00		
017	Compass Family Services	\$20,000.00	\$10,000.00	\$10,000.00		
023	San Francisco Food Bank	\$37,000.00	\$18,500.00	\$18,500.00		

For LRO's: In the **Interim & 2nd Pymt** on the left-hand main-menu, the Contact Person for the LRO can submit Interim Report and request for 2nd Pymt Request to the Local Board.

2. Select the Phase from the **Phase** drop-down box.

Note: *Interim Report can be keyed for the Current Phase only. The default Phase will always be the Current Phase.*

EFSP Emergency Food and Shelter National Board Program

Welcome : LB Chair (LB-000000) Home | Sign Out

Interim Report and Second Payment Request

Phase: 34 Total Awarded: \$200,000.00 Total Received: \$93,750.00

Key Interim Disapprove Interim View Interim Graph (in Categories)

LRO...	LRO Name	Award Amount	Received Amount	Payment Request	Submitted By (LB/LRO)	Status
002	Catholic Charities CYO	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
003	Central City Hospitality House	\$12,500.00	\$6,250.00	\$6,250.00	LRO	Approved
004	Dolores Street Community Servic...	\$14,000.00	\$7,000.00	\$7,000.00	LB	Approved
006	Episcopal Community Services	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
008	Hamilton Family Center, The	\$10,000.00	\$5,000.00	\$5,000.00	LRO	Pending
011	La Casa De Las Madres	\$17,000.00	\$3,250.00	\$13,750.00		
017	Compass Family Services	\$20,000.00	\$10,000.00	\$10,000.00		
023	San Francisco Food Bank	\$37,000.00	\$18,500.00	\$18,500.00		

3. Select the Interim Report from the grid.

Tip: Click the back-forward navigation arrows to navigate through pages.

Note: *Interim Report is keyed/modified for those LROs who Submitted By is blank and Status is blank or Submitted by is LB and Status is Pending or blank.*

EFSP Emergency Food and Shelter National Board Program

Welcome : LB Chair (LB-000000) Home | Sign Out

Interim Report and Second Payment Request

Phase: 34 Total Awarded: \$200,000.00 Total Received: \$93,750.00

Key Interim Disapprove Interim View Interim Graph (in Categories)

LRO Name	Award Amount	Received Amount	Payment Request	Submitted By (LB/LRO)	Status
002 Catholic Charities CYO	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
003 Central City Hospitality House	\$12,500.00	\$6,250.00	\$6,250.00	LRO	Approved
004 Dolores Street Community Servic...	\$14,000.00	\$7,000.00	\$7,000.00	LB	Approved
006 Episcopal Community Services	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
008 Hamilton Family Center, The	\$10,000.00	\$5,000.00	\$5,000.00	LRO	Pending
011 La Casa De Las Madres	\$17,000.00	\$3,250.00	\$13,750.00		
017 Compass Family Services	\$20,000.00	\$10,000.00	\$10,000.00		
023 San Francisco Food Bank	\$37,000.00	\$18,500.00	\$18,500.00		

4. Click the **Key Interim** button.

LRO Interim Report and Second Payment Request for Phase-# appears.

LRO Interim Report and Second Payment Request for Phase - 34					
LB Number	0000	LRO	017-Compass Family Services	Submitted By	
Awarded Amount	20,000	Paid Amount	10,000.00	2 nd Payment Request	10,000.00
Categories					
(A)	Served Meals		0.00		
(B)	Other Foods		0.00		
(C)	Mass Shelter		0.00		
(D)	Other Shelter		0.00		
(E)	Rent / Mortgage		0.00		
(F)	Supplies / Equipment		0.00		
(G)	Rehabilitation		0.00		
(H)	Utility Assistance		0.00		
(I)	Administration		0.00		
(J)	Unexpended Funds		0.00		
(K)	Total Expended		0.00		

5. Enter/Modify the amount in the fields provided against the **Categories** and click outside the grid.

LRO Interim Report and Second Payment Request for Phase - 34					
LB Number	0000	LRO	017-Compass Family Services	Submitted By	
Awarded Amount	20,000	Paid Amount	10,000.00	2 nd Payment Request	10,000.00
Categories					
(A)	Served Meals		0.00		
(B)	Other Foods		10,000.00		
(C)	Mass Shelter		0.00		
(D)	Other Shelter		0.00		
(E)	Rent / Mortgage		0.00		
(F)	Supplies / Equipment		0.00		
(G)	Rehabilitation		0.00		
(H)	Utility Assistance		0.00		
(I)	Administration		0.00		
(J)	Unexpended Funds		0.00		
(K)	Total Expended		10,000.00		

Note: Total Expended should not be greater than Paid Amount otherwise a pop-up message will appear that says, "Total Expended should not be greater than Paid Amount (\$). Click the **OK** button and enter the amount again.

6. Click the **Submit to EFSP and Esign** button.

Note: The amount reported (line K) must equal the amount paid to date. If you have not spent all the received funds, please enter the amount of unexpended funds on line J.

If Total Expended is not equal to the Paid Amount, then a pop-up message appears that says, “LRO Final Report is not balanced. Do you want to save this Interim Report?”

Click the **OK** button to save. OR Click the **Cancel** button to edit the amount entered. Click the **Close** button.

Note: If an Interim Report which is not balanced is submitted to EFSP, then a pop-up message appears that says, “You can submit only those LRO Interim Reports whose status is Pending.” Click the **OK** button.

- A pop-up message appears that says, “LRO Interim Report successfully saved.”
- Click the **OK** button.
- A pop-up message appears that says, “Are you sure you want to submit the LRO Interim Report and Second Payment Request?”
- Click the **OK** button.
- A pop-up message appears that says, “Email for e-signing the LRO Interim Report and Second Payment Request has been successfully sent to the LRO.”
- Click the **OK** button.

Interim Report and Second Payment Request screen appears with the LRO Interim Report (in categories) chart.

An email is sent to the LRO by DocuSign to electronically sign the Interim Report and Second Payment Request.

The **Status** of the LRO in the grid changes to **Pending**.

After the LRO has signed the Interim Report and Second Payment Request, the Local Board Contact will receive an email from DocuSign to electronically sign the Interim Report and Second Payment Request.

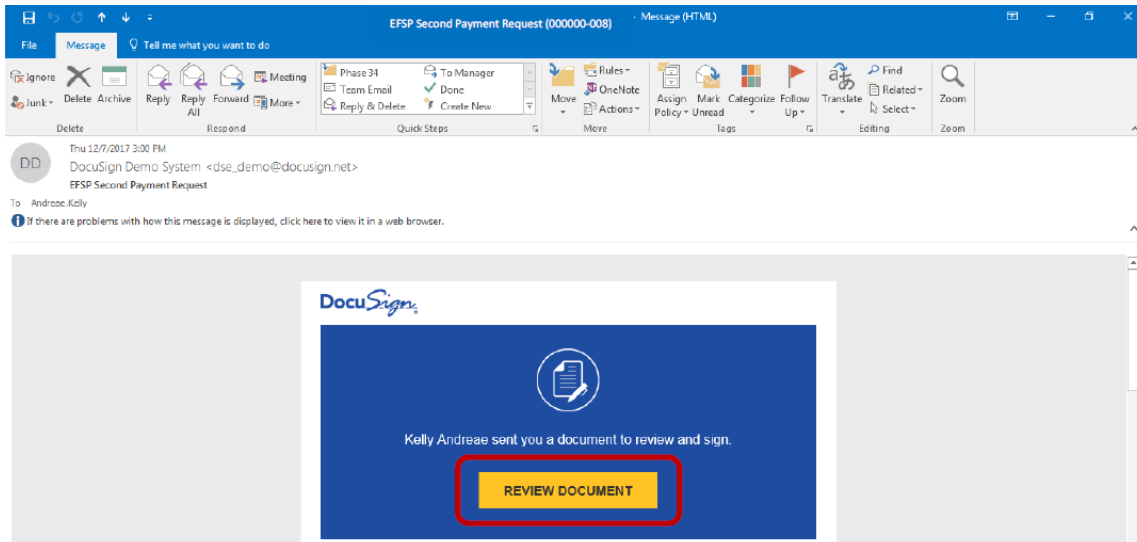
Once both the LRO and the Local Board electronically sign the document the status will say **Approved**.

2. Approve LRO Submitted Interim Request

Approval for a Interim Report and Second Payment Request submitted by the LRO through the EFSP website is done through the electronic signature process.

3. Electronic Signature

1. Review the DocuSign email.
Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



2. **Agree to sign electronically.**

Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.

Please Review & Act on These Documents



LRO Contact
LRO Name

This form must be signed using DocuSign to complete the submission of the Second Payment Request. Once the form has been signed by the LRO and Local Board, the second portion of the award will be released. Please note: Second payments will be held until all compliance exceptions (if any) are satisfied by the LRO.
[View Less](#)

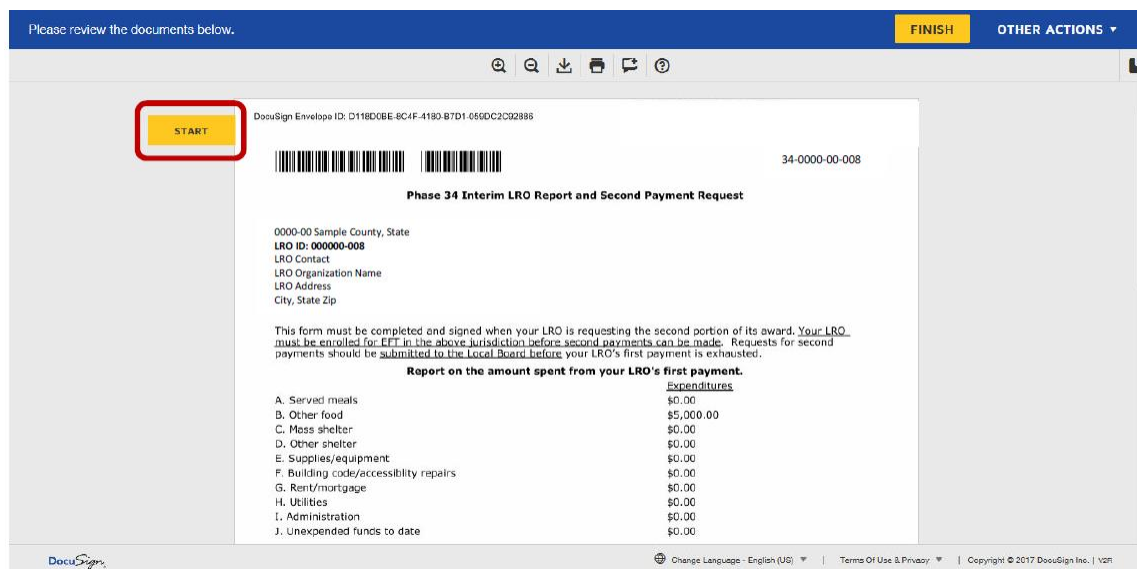
Please review the documents below.

CONTINUE

OTHER ACTIONS ▾

3. **Start the signing process**

Click the **Start** tag on the left to begin the signing process. You are taken to the first field requiring action.



Click the **Sign** tag. You are asked to Adopt Your Signature.

The screenshot shows a DocuSign document interface. At the top, there is a blue header with the text "Select the sign field to create and add your signature." and buttons for "FINISH" and "OTHER ACTIONS". Below the header, the document content is displayed. A yellow arrow points to a "SIGN" button on the left side of the document. The document text includes: "K. Total of funds received to date (A+B+C+D+E+F+G+H+I+J) \$5,000.00", "Line K must equal the LRO's first payment", "DocuSigned by: LRO Contact 001", "12/7/2017", "Date", "Signature, LRO Agent", "This form will automatically be sent to your local board contact.", "DO NOT SEND TO NATIONAL BOARD WITHOUT LOCAL BOARD SIGNATURE", "FOR LOCAL BOARD SIGNATURE ONLY", "The above listed LRO is in need of the second portion of its award. By signing this report, the Local Board is satisfied that the LRO has expended funds in a timely manner and that the LRO is in compliance with the terms of this program.", "Required - Sign Here", "Sign", "12/7/2017", "Date", "LB Chair", "Signature, Local Board Chair", "This form will automatically be sent to the National Board.", "DO NOT SEND EXPENDITURE DOCUMENTATION WITH THIS FORM". At the bottom, there is a footer with "34-085800-008-SRFR.pdf", "1 of 1", "DocuSign", "Change Language - English (US)", "Terms Of Use & Privacy", and "Copyright © 2017 DocuSign Inc. | v21".

4. Verify your name.

Verify that your name and initials are correct. If not, change them as needed.

The screenshot shows the "Adopt Your Signature" dialog box. The title is "Adopt Your Signature". Below the title, there is a red-bordered box containing the text "Confirm your name, initials, and signature." and "* Required". There are two input fields: "Full Name*" with the value "LB Chair" and "Initials*" with the value "LC". Below the input fields, there are two tabs: "SELECT STYLE" and "DRAW". Under the "SELECT STYLE" tab, there is a "PREVIEW" section showing a signature "LB Chair" and initials "LC" with a DocuSigned by box containing "A2BD843840A74C8...". To the right of the preview is a "Change Style" link. Below the preview, there is a paragraph of text: "By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial." At the bottom, there are two buttons: "ADOPT AND SIGN" and "CANCEL".

5. **Adopt a signature.** Do **one** of the following:
 - a. Accept the default signature and initial style.
 - b. Click **Change Style**, and select a signature option.
 - c. Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

Adopt Your Signature

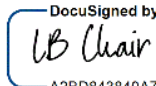

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

[SELECT STYLE](#) **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:
 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

6. Save your signature.

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Adopt Your Signature

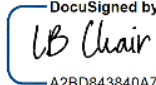

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

[SELECT STYLE](#) DRAW

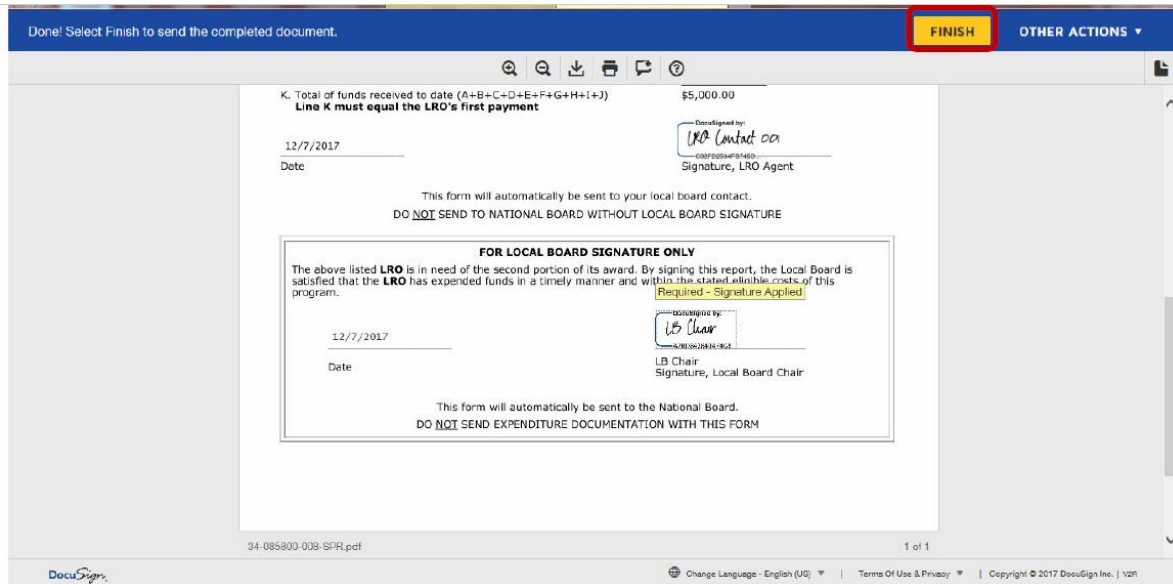
PREVIEW [Change Style](#)

DocuSigned by:
 
A2BD843840A74C8...

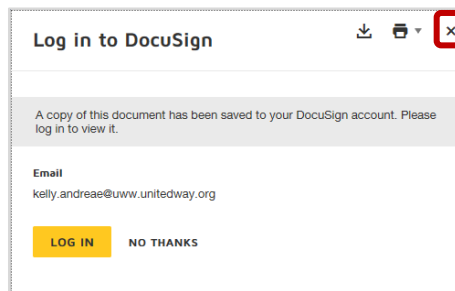
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

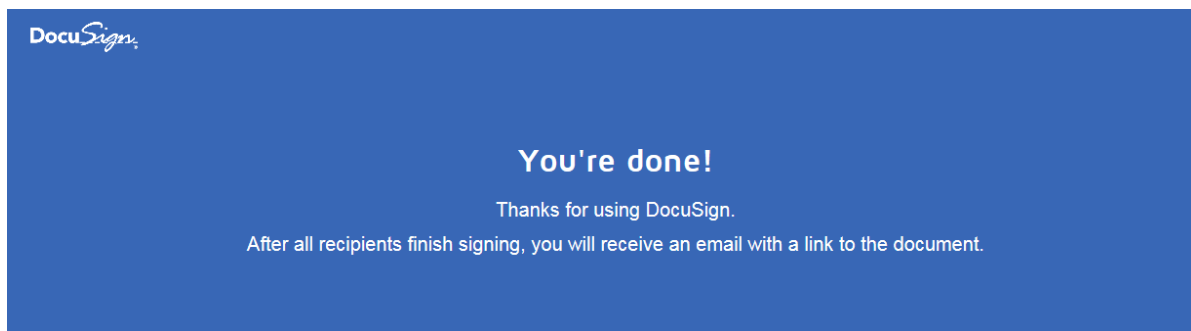
7. Confirm signing.
When you finish clicking all signature tags in the document, confirm signing by clicking **Finish**.



You are given the option to log into DocuSign. This is NOT required for EFSP. Click the **X** in the **right-hand corner**, unless you have an existing account you would like to connect to.



A message appears stating that you have completed your document.



You can now download a PDF copy or print a copy of the document on the EFSP website.

8. Click on **View Interim** to view/download the signed LRO Interim Report.

EFSP Emergency Food and Shelter National Board Program

Welcome : LB Chair (LB-000000) Home | Sign Out

Interim Report and Second Payment Request

Phase: 34 Total Awarded: \$200,000.00 Total Received: \$93,750.00

Key Interim Disapprove Interim **View Interim** Graph (in Categories)

LRO	LRO Name	Amount Awarded	Received Amount	Payment Request	Submitted By (LRO)	Status
002	Catholic Charities CYO	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
003	General City Hospitality House	\$12,000.00	\$0,250.00	\$0,250.00	LRO	Approved
004	Dolores Street Community Servic...	\$14,000.00	\$7,000.00	\$7,000.00	LB	Approved
006	Episcopal Community Services	\$14,000.00	\$7,000.00	\$7,000.00	LRO	Approved
008	Hamilton Family Center, The	\$10,000.00	\$5,000.00	\$5,000.00	LRO	Pending

Note: You will not be able to view/download the Interim Report until the signing process is complete by both the LRO and Local Board.

LRO Interim Report gets generated.

K. Total of funds received to date (A+B+C+D+E+F+G+H+I+J) **\$5,000.00**
Line K must equal the LRO's first payment

12/7/2017
 Date

DocuSigned by:
 LRO Contact 001
 Signature, LRO Agent

This form will automatically be sent to your local board contact.
 DO **NOT** SEND TO NATIONAL BOARD WITHOUT LOCAL BOARD SIGNATURE

FOR LOCAL BOARD SIGNATURE ONLY

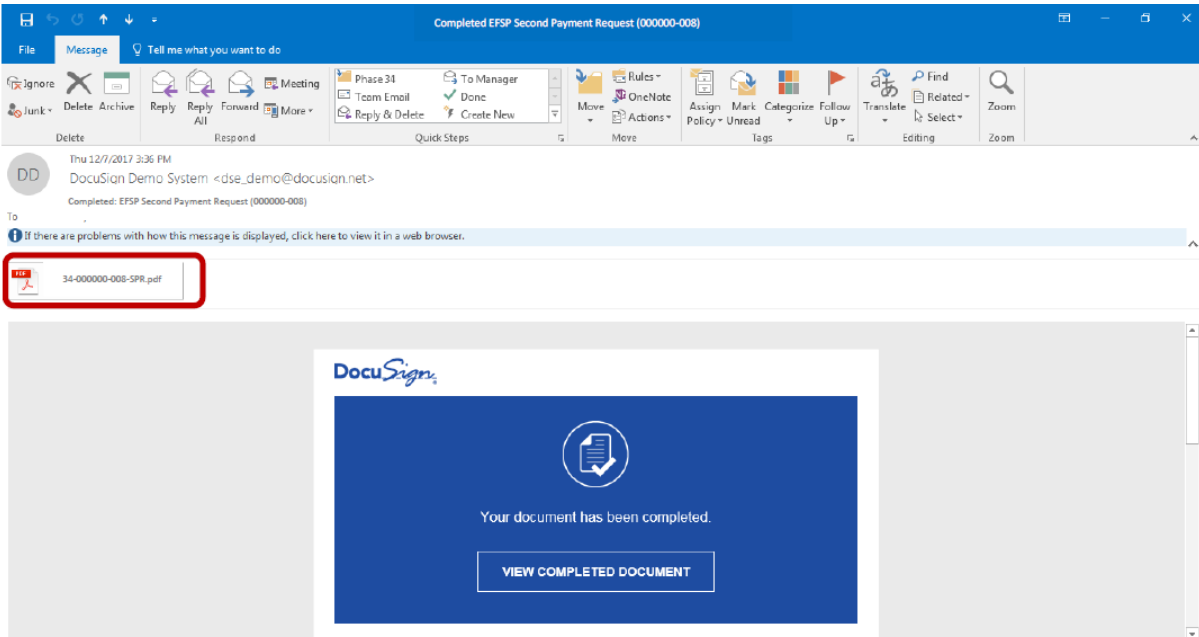
The above listed **LRO** is in need of the second portion of its award. By signing this report, the Local Board is satisfied that the **LRO** has expended funds in a timely manner and within the stated eligible costs of this program.

12/7/2017
 Date

DocuSigned by:
 LB Chair
 Signature, Local Board Chair

This form will automatically be sent to the National Board.
 DO **NOT** SEND EXPENDITURE DOCUMENTATION WITH THIS FORM

The Local Board and LRO will also receive an email with the signed document attached, and the signed document appears in EFSP DocuSign account.



This completes the submission of the Interim Report and Second Payment Request, and the payment will be released.

Please note: Second Payments will be held until ALL compliance exceptions (if any) have been resolved by the LRO.

IF LRO INTERIM REPORT AND SECOND PAYMENT REQUEST IS DISAPPROVED BY EFSP

Interim Report and Second Payment Request						
Phase	28	Total Awarded Amount	\$23,855.00	Total Received Amount	\$11,927.50	
Key Interim Disapprove Interim View Interim Graph (in Categories)						
LRO No.	LRO Name	Award Amount	Received Amount	Payment Request	Submitted By (LB/LRO)	Status
001	Acadia Vermilion Community Action	10,000.00	5,000.00	5,000.00	LRO	Disapproved
003	Crowley Christian Care Center	10,000.00	5,000.00	5,000.00	LB	Disapproved
005	Assist Agency, The	3,855.00	1,927.50	1,927.50	LB	Approved

Based on the comments LB can modify the Interim Report submitted by LB.

- A. Select the LRO Interim Report whose **Submitted By** is **LB** and **Status** is **Disapproved**.
- B. Click the **Key Interim** button on **Interim Report and Second Payment Request** screen. **LRO Interim Report and Second Payment Request for Phase-#** appears.

LRO Interim Report and Second Payment Request for Phase - 28													
LB Number	357400	LRO	003-Crowley Christian Care Cente	Submitted By	LB								
Awarded Amount	10,000	Paid Amount	5,000.00	2 nd Payment Request	5,000.00								
Categories													
(A)	Served Meals		2,500.00										
(B)	Other Foods		2,500.00										
(C)	Mass Shelter		0.00										
(D)	Other Shelter		0.00										
(E)	Rent / Mortgage		0.00										
(F)	Supplies / Equipment		0.00										
(G)	Rehabilitation		0.00										
(H)	Utility Assistance		0.00										
(I)	Administration		0.00										
(J)	Unexpended Funds		0.00										
(K)	Total Expended		5,000.00										
Click on 'Save' button to save the LRO Interim Report and Second Payment Request.													
<		<		>		>		Save		Close		View Disapproval Comments	

C. Click the **View Disapproval Comments** button.

Interim Report and Second Payment Request Disapproval Comments window appears.

D. Modify the LRO Interim Report.

E. Click the **Submit and E-Sign** button.

- A pop-up message appears that says, “LRO Interim Report saved successfully”
- Click the **OK** button.
- A pop-up message appears that says, “Are you sure to submit LRO Interim Report and Second Payment Request to EFSP.”
- Click the **OK** button.
- A pop-up message appears that says, “LRO Interim Report and Second Payment Request submitted to EFSP successfully”.
- Click the **OK** button.
- A pop-up message appears that says, “Email for e-signing the LRO Interim Report and Second Payment Request has been successfully sent to the LRO.”
- Click the **OK** button.

Interim Report and Second Payment Request screen appears with the LRO Interim Report (in categories) chart.

An email is sent to the LRO by DocuSign to electronically sign the Interim Report and Second Payment Request.

The **Status** of the LRO in the grid changes to **Pending**.

After the LRO has signed the Interim Report and Second Payment Request, the Local Board Contact will receive an email from DocuSign to electronically sign the Interim Report and Second Payment Request.

Once both the LRO and the Local Board electronically sign the document the status will say **Approved**.

4. Disapprove Interim Report

1. Click on **Interim & 2nd Pymt** on the main-menu.
Interim Report and Second Payment Request screen appears with all the LROs whose First Payment is made in the Current Phase and their Interim Report status details in the grid.

Interim Report and Second Payment Request						
Phase	28	Total Awarded Amount	\$23,855.00	Total Received Amount	\$11,927.50	
Key Interim Submit Interim to EFSP Disapprove Interim Print Interim View Interim Graph (in Categories)						
LRO No.	LRO Name	Award Amount	Received Amount	Payment Request	Submitted By (LB/LRO)	Status
001	Acadia Vermilion Community Action	10,000.00	5,000.00	5,000.00	LRO	Pending
003	Crowley Christian Care Center	10,000.00	5,000.00	5,000.00	LB	Pending
005	Assist Agency, The	3,855.00	1,927.50	1,927.50	LB	Pending

2. Select the Phase from the **Phase** drop-down box.
3. Select the Interim Report from the grid whose **Submitted By** is **LRO**.

Note: *If Interim Report submitted by LB is selected and Disapprove Interim Report is clicked, the pop-up message appears that says, "You can disapprove only those Interim Reports and Second Payment Requests which have been submitted by LRO from the web." Click the **OK** button.*

4. Click the **Disapprove Interim** button.
A pop-up message appears that says, "Are you sure to disapprove this LRO Interim Report and Second Payment Request."
5. Click the **OK** button.
Enter Disapproval Comments window appears.
6. Enter comments in the text box.
7. Click the **OK** button.

Final Reports

In **Final Reports** main-menu, the Local Board Chair/Contact Person can key/modify LRO Final Reports, disapprove Final Reports submitted by LROs and submit the Local Board Final Report to EFSP.

A. Key/Modify Final Report

*Note: Final Reports are keyed for those LROs who have manually submitted their Final Reports or those who **did not** report.*

15. Click on **Final Report** on the left-hand main-menu.

The screenshot shows the EFSP website interface. The left-hand navigation menu includes options like 'Supplemental Funding', 'EFSP Website Guide', 'LB Policy Papers', 'Forms', 'DUNS', 'Reports', 'Board Plan', 'LRO Certifications', 'Reallocation', 'Interim & 2nd Pymt', 'Final Report' (highlighted with a red box), 'Variances', 'Manage LB Members', 'Manage LRO', 'Change Password', 'Training Workshops', 'Key Program Dates', and 'Quick Reference Guides'. The main content area displays 'User Instructions' with an item number 2 and a link to 'Phases 35 and 36 Final Reports Status (as of August 31, 2020)'. Below the link, there is a detailed text block explaining the National Board's preparation for the release of Phases 35 and 36 Final Reports, including system changes and updated guidance documents. It also mentions that there are some changes to the Final Report submission to the National Board, details of which are provided in the information made available on the website. An overview of these changes is included in the communication. It is important that all information regarding Final Reports is read in its entirety. The text further states that previously, Local Boards and LROs were notified that the National Board modified the guidelines to allow the quick release of Phases 37 and CARES first payments to agencies. To continue releasing funding to agencies as quickly as possible, the National Board also made changes to the program guidelines for Phases 35 and 36 Final Reports documentation and spreadsheets submission for LROs that received funding. Please see the overview regarding each of the changes below, further detail will be provided in the Final Reports materials. A section titled 'Documentation Submission' explains that documentation, copies of receipts, invoices and proof of payments for expenditures made with EFSP funds, will only be required for agencies that were new participants in the program in Phases 35 and 36 or selected at the National Board's discretion. If an agency was considered new or selected at the National Board's discretion, they will have to submit documentation to support all expenditures made in both phases, if funding was received. Documentation submission status will be provided in the LRO Submission Status Letter that will be on the website for Local Boards in the Final Report dashboard for each phase and it will be indicated on LROs' individual Final Reports. It is important to remember that while documentation may not be requested with Final Reports, LROs are still required to maintain the documentation for a period of 3 years, after the Final Report has been reviewed by the National Board. Documentation may be requested at anytime during the retention period by the National Board, the EFSP external auditor, FEMA or others for program compliance review.

The **Final Report** screen will appear with all the LROs Final Reports details in the grid.

The screenshot displays the 'Final Report' screen. At the top, there is a 'Final Report' header. Below it, the 'Phase' is set to '35' and the 'Total Received Amount' is '\$7,305.00'. The 'Final Report Status' is 'Pending - Final Report status will change after Local Board submits the Local Board Final Report to EFSP.' There is a 'Print LRO Submission Status Letter' button and a larger button that says 'Click Here to Submit the Local Board Final Report to EFSP'. On the right side, there is an 'Instructions and Guidance' section with several links: 'Local Board Memorandum', 'State Set-Aside Committee Memorandum', 'Guidance for Submission of Spreadsheets', 'Re allocations Guidance', 'Fiscal Conduit Memorandum and Instructions', 'Returned Funds Form', 'Steps to Package Documentation', and 'Common Errors to Avoid/Final Report Self-Certification'. Below this is a table of LROs with columns for 'LRO No.', 'LRO Name', 'Received Amount', 'Submitted By (LB/LRO)', and 'Status'. The table contains two rows: one for '003 Sample Food Bank' with a received amount of '\$4,655.00' and status 'Approved', and another for '010 Sample Shelter' with a received amount of '\$2,650.00'. At the bottom of the screen, there is a pagination control showing 'Page 1 of 1'.

LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00		

16. Select the Phase from the **Phase** drop-down box.

Note: The LRO Final Reports can be viewed/printed for any Phase once it has been e-signed by both the LRO and Local Board contact. The default Phase will always be the Current Phase.

Final Report			
Phase	35 ▼	Total Received Amount	\$7,305.00
Final Report Status	Pending – Final Report status will change after Local Board submits the Local Board Final Report to EFSP.		
Print LRO Submission Status Letter			
Click Here to Submit the Local Board Final Report to EFSP			

17. Select the Final Report you would like to key from the grid.

Tip: Click the back-forward navigation arrows to navigate through pages.

Note: Final Report can be keyed/modified by the Local Board for those LROs whose **Submitted By** is blank and **Status** is blank or **Submitted by** is **LB** and **Status** is **Balanced** or blank. You cannot key or modify a Final Report that was submitted by the LRO.

LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00		

Navigation: Page 1 of 1

18. Click the **Key Final Report** button.

The **LRO Final Report** appears.

19. If an LRO did not submit a Final Report, check the **Did Not Report** box at the top right corner. After the box is checked, the screen becomes read only and the boxes are disabled. Click the **Save** button at the bottom of the screen.

- A pop-up message appears that reads, “LRO Final Report saved successfully”.
- Click the **OK** button.
- Click the **Close** button.
- **Final Report** screen appears with LRO Final Report **Submitted By LB** and **Did Not Report Status**.

LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00	LB	Did Not Report

20. For an LRO that manually submits their Final Report information to the Local Board, and if an audit was done, enter the LRO's audit information.

Note: Please leave the audit fields blank if an audit was not conducted for the LRO. An audit is **required** for all LROs received **\$50,000 or more** in EFSP funds.

- Select if there were **Audit Findings** in the LRO's most recent audit.
- Select the **Audit Type**.
- Enter the **Audit Date (the end of the audited period)**.
- Enter the name of the **Audit Preparer**.

LRO Final Reports for Phase - 35				
LB Number	000000	LRO	010-Sample Shelter	
Audit Finding	Select... ▼	Audit type	Select... ▼	Did Not Report <input type="checkbox"/>
Audit Date	<input type="text"/>	Audit Preparer	<input type="text"/>	Submitted By <input type="text"/>

21. Enter the Interest amount in the **Interest** field, if there is any interest earned.

Note: Total Available field gets added with the amount of Interest earned.

LRO Final Reports for Phase - 35				
LB Number	000000	LRO	010-Sample Shelter	
Audit Finding	Select... ▼	Audit type	Select... ▼	Did Not Report <input type="checkbox"/>
Audit Date	<input type="text"/>	Audit Preparer	<input type="text"/>	Submitted By <input type="text"/>
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended
2,650.00	+ 0.00	= 2,650.00	- 0.00	= 2,650.00

22. Enter the Unexpended amount in the **Unexpended** field, if there are any unexpended funds.

Note: The Net Expended field gets subtracted with the amount that is unexpended.

LRO Final Reports for Phase - 35				
LB Number	000000	LRO	010-Sample Shelter	
Audit Finding	Select... ▼	Audit type	Select... ▼	Did Not Report <input type="checkbox"/>
Audit Date	<input type="text"/>	Audit Preparer	<input type="text"/>	Submitted By <input type="text"/>
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended
2,650.00	+ 0.00	= 2,650.00	- 0.00	= 2,650.00

23. Enter the **amount spent** in each spending category (lines A. through I.)

(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended
2,650.00	+ 0.00	= 2,650.00	- 0.00	= 2,650.00

Categories				
(A) Served Meals	0.00	No. of Meals	0	Individuals Served 0
(B) Other Foods	0.00	No. of Meals	0	Individuals Served 0
(C) Mass Shelter	0.00	No. of Nights	0	Individuals Served 0
(D) Other Shelter	0.00	No. of Nights	0	Individuals Served 0
(E) Rent / Mortgage	0.00	No. of Bills Paid	0	Individuals Served 0
(F) Supplies / Equipment	0.00			
(G) Rehabilitation	0.00			
(H) Utility Assistance	0.00	No. of Bills Paid	0	Individuals Served 0
(I) Administration	0.00			
(J) Total Expended	0.00			

Click on "Submit and ESign" button to submit and e-sign the LRO Final Report

24. Enter the outcomes numbers in the **No. of Meals**, **No. of Nights** and **No. of Bills Paid** field, if expenditures were made in that category.

Note: If the category amount is greater than \$0, the outcome number should be greater than 0. **The outcome numbers should be reasonable, and it should reflect the numbers associated with EFSP funding only.** For the Mass Shelter category, No. of Nights should equal the amount spent divided by the per diem rate.

(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended
2,650.00	+ 0.00	= 2,650.00	- 0.00	= 2,650.00

Categories				
(A) Served Meals	0.00	No. of Meals	0	Individuals Served 0
(B) Other Foods	0.00	No. of Meals	0	Individuals Served 0
(C) Mass Shelter	0.00	No. of Nights	0	Individuals Served 0
(D) Other Shelter	0.00	No. of Nights	0	Individuals Served 0
(E) Rent / Mortgage	0.00	No. of Bills Paid	0	Individuals Served 0
(F) Supplies / Equipment	0.00			
(G) Rehabilitation	0.00			
(H) Utility Assistance	0.00	No. of Bills Paid	0	Individuals Served 0
(I) Administration	0.00			
(J) Total Expended	0.00			

Click on "Submit and ESign" button to submit and e-sign the LRO Final Report

25. Enter the number in the Individuals Served fields, if expenditures were made in those categories.

(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended
2,650.00	+ 0.00	= 2,650.00	- 0.00	= 2,650.00

Categories				
(A) Served Meals	0.00	No. of Meals	0	Individuals Served 0
(B) Other Foods	0.00	No. of Meals	0	Individuals Served 0
(C) Mass Shelter	0.00	No. of Nights	0	Individuals Served 0
(D) Other Shelter	0.00	No. of Nights	0	Individuals Served 0
(E) Rent / Mortgage	0.00	No. of Bills Paid	0	Individuals Served 0
(F) Supplies / Equipment	0.00			
(G) Rehabilitation	0.00			
(H) Utility Assistance	0.00	No. of Bills Paid	0	Individuals Served 0
(I) Administration	0.00			
(J) Total Expended	0.00	Click on "Submit and ESign" button to submit and e-sign the LRO Final Report		

26. Once the data has been entered, the **Total Expended** (line J) should equal the **Net Expended** (5.)

Note: Potential Error Messages

- If the Total Expended is more than the Net Expended a pop-up message appears that reads, "Total Expended should not be greater than Net Expended (\$#,###.##)". Click the **OK** button and enter amount again.
- If Total Expended is less than Net Expended a pop-up message appears that reads, "LRO Final Report is not balanced. Please balance the LRO Final report to proceed with e-signing." Click the **OK** button. And enter the amount again so that the Total Expended equals the Net Expended.
- If a category has a \$ amount listed, but no program outcome listed, a pop-up message appears that reads, "Please enter No. of [Meals/Nights/Bills] in the [category name] category." Click the **OK** button and enter the appropriate program outcome number.

27. If data entry is complete, click the **Submit and ESign** button.

- If unexpended funds of \$5 or more are reported, a pop-up message appears that reads, "Unexpended funds of \$5 or more must be submitted to the Local Board to forward to the National Board. Please make the check payable to "United Way Worldwide/EFSP.""
- Click the **OK** button.
- A pop-up message appears that reads, "Do you want to send the LRO Final Report to the LRO contact for e-signature?"
- Click the **OK** button.
- A pop-up message appears that reads, "Email for e-signing the LRO Final Report has been successfully sent to the LRO."
- Click the **OK** button.

Final Report screen appears with Final Report details in the grid. The recently submitted LRO Final Reports will display that it was submitted by LB and has a status of **Pending**.

LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00	LB	Pending

An email is sent to the LRO via DocuSign to electronically sign the LRO Final Report.

After the LRO has signed the Final Report, the Local Board Contact will receive an email from DocuSign to electronically sign the LRO Final Report.

B. Approve LRO Submitted Final Report

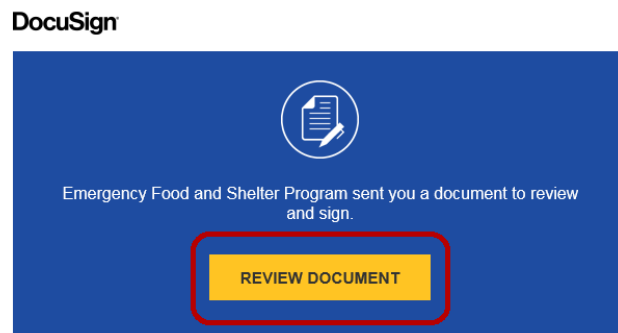
Approval for a LRO Final Report submitted by the LRO through the EFSP website is done through the electronic signature process.

- If the LRO’s status is “Balanced,” that means either the LRO or Local Board keyed the Final Report online without clicking on “Submit and Esign.”
- If the LRO’s status is blank, either the LRO or Local Board need to key the final report first, or the Local Board can mark the LRO as did not report.
- If the LRO’s status is “Not Balanced,” this means the dollar amount entered by LRO or Local Board is incorrect (the Net Expended does not equal to the Total Expended.)
- The Local Board does not need to approve an LRO Final Report if the status is “Did Not Report”.

C. Electronic Signature for Local Board Approval of LRO Final Report

After the Local Board or LRO web submitted the LRO Final Report, an email is sent to the LRO email address on file for e-signing. After the LRO e-signs the Final Report, and uploads the spreadsheets and documentation (if required), it is automatically sent to the Local Board Contact for e-signing and approval.

1. Review the DocuSign email.
Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



- Agree to sign electronically.
Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.

Please Review & Act on These Documents DocuSign

LB Contact
LB Name

This form must be signed using DocuSign to complete the submission of the Final Report. Once the form has been signed by the LRO and Local Board contact, the LRO will be eligible to receive funds from future phases. Please note: All payments will be made to the LRO.

I agree to use electronic records and signatures

CONTINUE OTHER ACTIONS ▾

- Start the signing process.
Click the **Start** tag on the left to begin the signing process. You are taken to the first field requiring action.

Please review the documents below. **FINISH** OTHER ACTIONS ▾

START

DocuSign Envelope ID: E8533C99-EDBF-41A1-9A05-150AA6FC9319

This report must be filled out by: Senior Citizens Services, Inc.
Stewart B. McKinney Homeless Assistance Act
EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM

000000* *010

**LRO Final Report
Phase 35**

Submit the e-signed LRO Final Report with spreadsheets and documentation (if required by EFSP) to your Local Board no later than 10/19/2020. Retain a copy for your records.

This report is cumulative through 01/31/2019. Report everything spent since the beginning of your Phase 35 program.

Jurisdiction ID# ----- **0000-00**
Jurisdiction -----
Local Board Name -----
Spending Period
Begin Date **02/01/2018**
End Date **01/31/2019**
LRO Number: **010**
LRO ID: **000000 - 010**

LRO Contact
LRO Name
Business Address
City, State, Zip

Phone: 000-000-0000
Fax: 000-000-0000
NDR \$2,650.00

Spreadsheets must be submitted with this report. No documentation needs to be filed with the National Board at this time, though it may be requested in the future. Your Local Board, however, may require submission for its own review.

(1) Total Paid	\$	2,650.00
(2) Interest income earned	\$	0.00
(3) Total available for program	\$	2,650.00
(Add lines 1 & 2)		
(4) Less award amount	\$	0.00
unexpended as of: 01/31/2019		
(5) Net expenditures (3 less 4)	\$	2,650.00

Food:					
(A) Expenditures for served meals	\$0.00	Meals	Individual		
		0	0		
(B) Expenditures for other food	\$0.00				
Emergency Repairs/Building Code:					
(G) Expenditures to rehabilitate a facility	\$0.00				

Click the **Sign** tag. You are asked to Adopt Your Signature.

Please review the documents below. **FINISH** OTHER ACTIONS ▾

START

Food:					
(A) Expenditures for served meals	\$0.00	Meals	Individual		
		0	0		
(B) Expenditures for other food	\$0.00				
Emergency Repairs/Building Code:					
(G) Expenditures to rehabilitate a facility	\$0.00				
Energy:					
(H) Expenditures for utility assistance to an individual or family. Number of bills paid.	\$0.00	Bills Paid	Individual		
		0	0		
Administration:					
(I) Administrative costs incurred (You are allowed up to 2.00% of your award if approved by Local Board.)	\$0.00				
Supplies/Equipment:					
(F) Expenditures for supplies/equipment	\$0.00				
Grand Total:					
(J) Total amount expended (Add A-I, must match (5) above)	\$2,650.00				

Discussed by: LRO Contact
LRO AUTHORIZED Signature

Sign
Local Board Member Signature
(Local Board Review and Approval)

4. Verify that your name and initials are correct. If not, change them as needed.

Adopt Your Signature

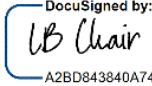

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:  DS 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

5. Adopt a signature. Do **one** of the following:
- Accept the default signature and initial style.
 - Click **Change Style**, and select a signature option.
 - Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

Adopt Your Signature

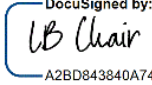

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:  DS 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.


ADOPT AND SIGN **CANCEL**

6. Save your signature.

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

Food:		Meals	Individual	Emergency Repairs/Building Code:	
(A) Expenditures for served meals	\$0.00	0	0	(G) Expenditures to rehabilitate a facility due to building code citation	\$0.00
(B) Expenditures for other food	\$0.00	0	0		
Shelter:		Nights	Individual	Energy:	
(C) Expenditures for mass shelter Number of nights' lodging from these funds. (on-site shelter)	\$2,650.00	353	180	(H) Expenditures for utility assistance to an individual or family. Number of bills paid.	\$0.00
(D) Expenditures for other shelter Number of motel/hotel nights	\$0.00	0	0	Bills Paid	0
(E) Expenditures for rent/mortgage Number of bills paid from these funds	\$0.00	Bills Paid	0	Individual	0
Supplies/Equipment:				Administration:	
(F) Expenditures for supplies/equipment	\$0.00			(I) Administrative costs incurred (You are allowed up to 2.00% of your award if approved by Local Board.)	\$0.00
				Grand Total:	
				(J) Total amount expended (Add A-I, must match (5) above)	\$2,650.00

LRO Authorized by:  LRO AUTHORIZED Signature

 Local Board Chair
—Signature/Title/Date
 Local Board Member Signature
 (Local Board Review and Approval)

7. Review spreadsheets and documentation.

Scroll down to review the spreadsheets and documentation (if required) submitted by the LRO. If the uploaded spreadsheets and documentation are not accurate, the Local Board should not approve and e-sign the LRO Final Report. Please reference section D - Disapprove LRO Final Report. Otherwise, continue to the next step.

Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

SAMPLE DAILY PER DIEM LOG

Phase Number: 35
 Local Board ID Number: 0000-00
 LRO ID Number: 0000-00-010

Sample Shelter
 Business Address
 City, State, Zip

Date (month/day/year)	Number of Clients	Per Diem Rate (exactly \$7.50 or \$12.50 as approved by Local Board)	TOTAL
1/12/2019	25	\$7.50	\$187.50
1/13/2019	50	\$7.50	\$375.00

8. Confirm signing.

When you finish clicking all signature tags in the document and reviewing the spreadsheets and documentation (if required), confirm signing by clicking **Finish**.

Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

NDR \$2,650.00 (4) Less award amount unexpended as of: 01/31/2019 \$ 0.00
(5) Net expenditures (3 less 4) \$ 2,650.00

Food:		Meals	Individual	Emergency Repairs/Building Code:	
(A) Expenditures for served meals	\$0.00	0	0	(G) Expenditures to rehabilitate a facility due to building code citation	\$0.00
(B) Expenditures for other food	\$0.00	0	0		
Shelter:		Nights	Individual	Energy:	
(C) Expenditures for mass shelter Number of nights' lodging from these funds. (on-site shelter)	\$2,650.00	353	180	(H) Expenditures for utility assistance to an individual or family. Number of bills paid.	Bills Paid Individual \$0.00 0 0
(D) Expenditures for other shelter Number of motel/hotel nights	\$0.00	0	0		
(E) Expenditures for rent/mortgage Number of bills paid from these funds	\$0.00	Bills Paid 0	0	Administration:	
Supplies/Equipment:				(I) Administrative costs incurred (You are allowed up to 2.00% of your award if approved by Local Board.)	\$0.00
(F) Expenditures for supplies/equipment	\$0.00			Grand Total:	
				(J) Total amount expended (Add A-1, must match (5) above)	\$2,650.00

DocuSigned by: *LRO Contact*
LRO Authorized Signature

DocuSigned by: *Local Board Chair*
Local Board Member Signature
(Local Board Review and Approval)

You are given the option to log into DocuSign. This is NOT required for EFSP. Click the **NO THANKS** button, unless you have an existing account you would like to connect to.

Email: sample@uww.unitedway.org

Password:

Confirm Password:

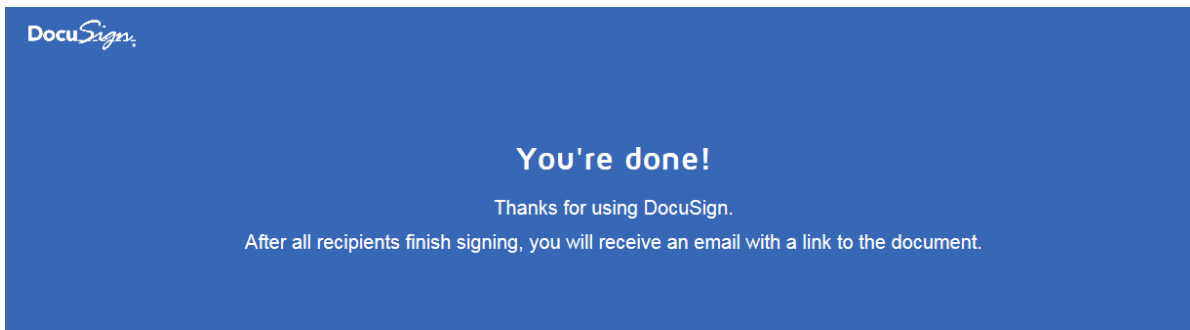
Country: -- select --

By clicking the 'SUBMIT' button, you agree to the [Terms & Conditions](#) and [Privacy Policy](#).

SUBMIT **NO THANKS**

- Electronically sign any document.
- Get signatures from others.
- Sign on the go with DocuSign Mobile!

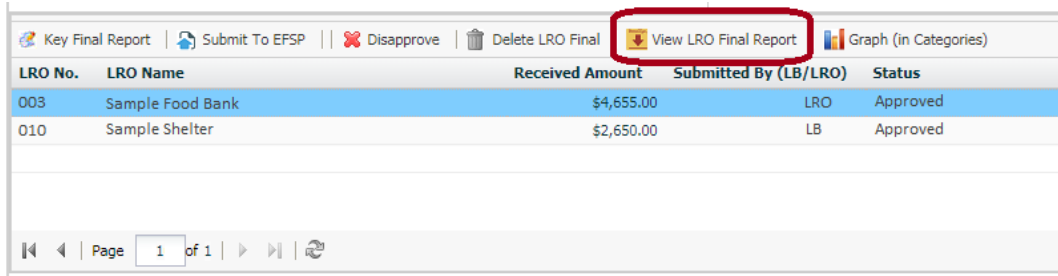
A message appears stating that you have completed your document.



You can now download a PDF copy or print a copy of the document on the EFSP website.

9. View Final Report.

Select the LRO with an Approved status and click on **View Final Report** to view/download the signed LRO Final Report.



Note: You will not be able to view/download the Final Report until the signing process is complete by both the LRO and Local Board.

The signed LRO Final Report is generated with the uploaded spreadsheets and documentation (if required).

DocuSign Envelope ID: E8533C99-EDBF-41A1-9A65-150AA6FC9319

This report must be filled out by: Senior Citizens Services, Inc.

Stewart B. McKinney Homeless Assistance Act
EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM

000000 *010*

**LRO Final Report
Phase 35**

Submit the e-signed LRO Final Report with spreadsheets and documentation (if required by EFSP) to your Local Board no later than 10/19/2020. Retain a copy for your records.

This report is cumulative through 01/31/2019. Report everything spent since the beginning of your Phase 35 program.

Jurisdiction ID# ----- **0000-00**
Jurisdiction ----- Local Board Name

**Spending Period
Begin Date 02/01/2018
End Date 01/31/2019**

LRO Number: **010**

LRO ID: 000000 - 010

LRO Contact
LRO Name
Business Address
City, State, Zip
Phone: 000-000-0000
Fax: 000-000-0000
NDR \$2,650.00

Spreadsheets must be submitted with this report. No documentation needs to be filed with the National Board at this time, though it may be requested in the future. Your Local Board, however, may require submission for its own review.

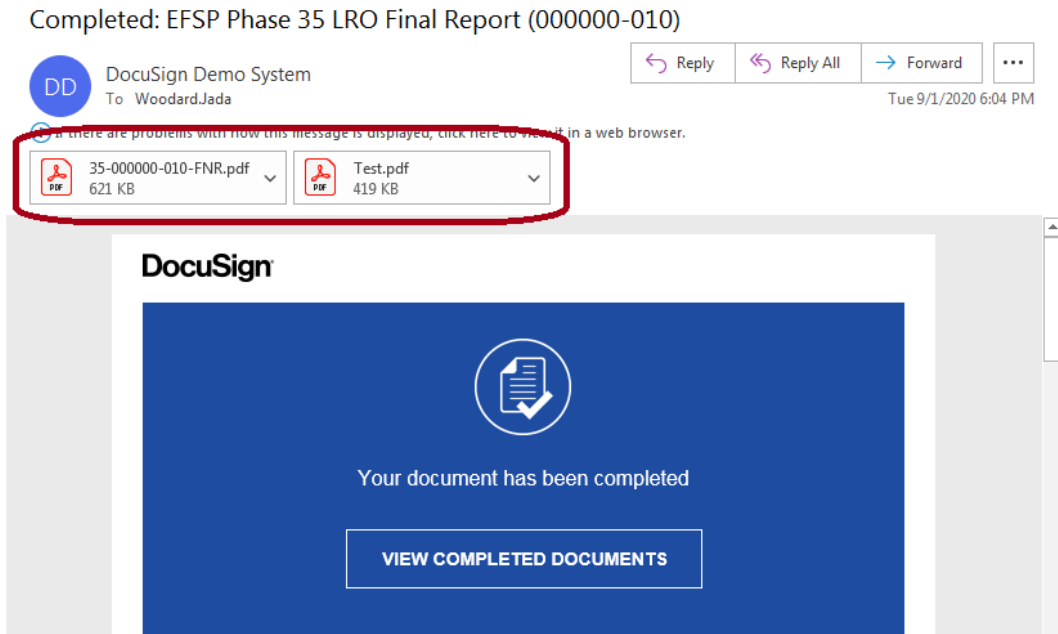
(1) Total Paid	\$	2,650.00
(2) Interest income earned	\$	0.00
(3) Total available for program	\$	2,650.00
(Add lines 1 & 2)		
(4) Less award amount unexpended as of: 01/31/2019	\$	0.00
(5) Net expenditures (3 less 4)	\$	2,650.00

Food:			Meals	Individual	Emergency Repairs/Building Code:		
(A) Expenditures for served meals	\$0.00		0	0	(G) Expenditures to rehabilitate a facility due to building code citation	\$0.00	
(B) Expenditures for other food	\$0.00		0	0	Energy:		
Shelter:			Nights	Individual	(H) Expenditures for utility assistance to an individual or family. Number of bills paid.	\$0.00	0 0
(C) Expenditures for mass shelter Number of nights' lodging from these funds. (on-site shelter)	\$2,650.00		353	180	Administration:		
(D) Expenditures for other shelter Number of motel/hotel nights	\$0.00		0	0	(I) Administrative costs incurred (You are allowed up to 2.00% of your award if approved by Local Board.)	\$0.00	
(E) Expenditures for rent/mortgage Number of bills paid from these funds	\$0.00				Grand Total:		
Supplies/Equipment:					(J) Total amount expended	\$2,650.00	
(F) Expenditures for supplies/equipment	\$0.00				(Add A-I, must match (5) above)		

DocuSigned by:
LRO Contact
LRO Authorized Signature

DocuSigned by:
Local Board Chair
Local Board Member Signature
(Local Board Review and Approval)

The Local Board and LRO will also receive an email with the signed document attached, and the signed document appears in EFSP DocuSign account.



This completes the Local Board approval of the LRO Final Report.

D. Disapprove LRO Final Report

1. Click on **Final Report** on the main-menu.
The **Final Report** screen appears with all the LROs final report status in the grid.
2. Select the Phase from the **Phase** drop-down box.
3. Select the Final Report from the grid whose **Submitted By** is **LRO** and the **Status** is **Pending/Balanced/Not Balanced**.

LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00	LRO	Pending

Key Final Report | Submit To EFSP | **Disapprove** | Delete LRO Final | View LRO Final Report | Graph (in Categories)

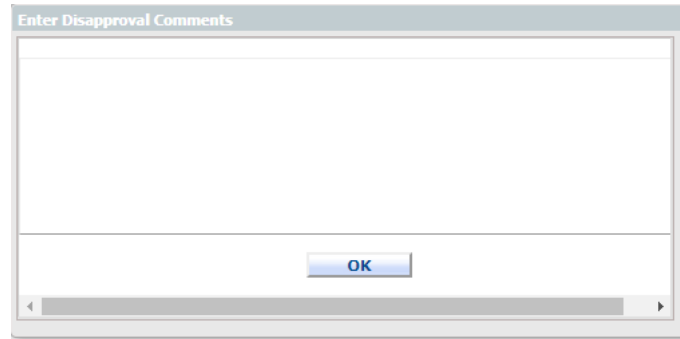
Page 1 of 1

Note: If Final Report submitted by LB is selected and Disapprove is clicked, the pop-up message appears that reads, “You can disapprove only those Final Reports which have been submitted by LRO from the web.” Click the **OK** button.

If Final Report submitted by LRO and the status is Approved is selected and Disapprove is clicked, the pop-up message appears that reads, “You cannot disapprove as the E-Signing process is already Completed”. Click the Ok button, and reference the “Delete LRO Final” section.

4. Click the **Disapprove** button.
A pop-up message appears that reads, “Are you sure to disapprove this LRO Final Report?”
5. Click the **OK** button.

Enter Disapproval Comments window appears.

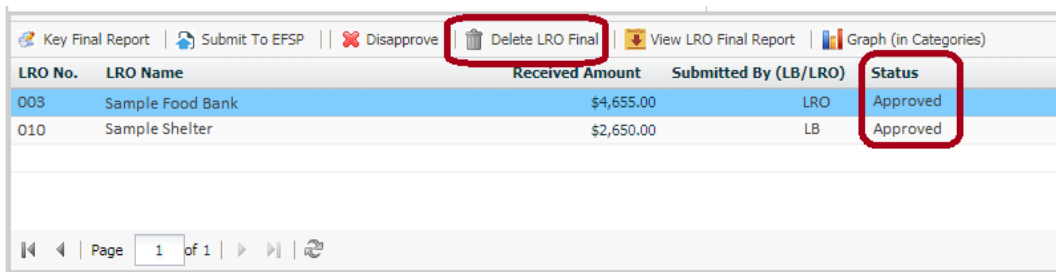


6. Enter comments in the text box.
7. Click the **OK** button.
A pop-up message appears that reads, “LRO Final Report disapproved successfully”
8. Click the **OK** button.
The **Status** of the LRO in the grid changes to **‘Disapproved’**.

An email is sent (with the Disapproval comments) to the LRO stating that the Final Report has been disapproved by the LB. The DocuSign envelope will also be voided and a notification will be sent to the LRO.

E. Delete an LRO Final Report

1. Click on **Final Report** on the main-menu.
2. Select the Phase from the **Phase** drop-down box.
3. Select the Final Report from the grid whose **Status** is **Approved**.



LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00	LB	Approved

Note: Once an LRO Final Report is deleted, it will need to be keyed again by the LRO or Local Board, and then submitted and e-signed.

4. Click the **Delete LRO Final** button.
A pop-up message appears that reads, “Are you sure to delete this LRO Final Report?”
5. Click the **OK** button.
A pop-up message appears that reads, “LRO Final Report successfully deleted.”
6. Click the **OK** button.
The **Status** of the LRO in the grid changes to *blank*.

Note: You can only delete a LRO final report prior to submitting the Local Board Final Report. Once the Local Board Final Report is submitted, you cannot change the LRO submissions.






F. Submit Local Board Final Report to EFSP

1. Click on **Final Report** on the main-menu. The **Final Report** screen appears.
2. Select the Phase from the **Phase** drop-down box.

Final Report			
Phase	35 ▼	Total Received Amount	\$7,305.00
Final Report Status	Pending - Final Report status will change after Local Board submits the Local Board Final Report to EFSP.		
Print LRO Submission Status Letter			
Click Here to Submit the Local Board Final Report to EFSP			

Note: LB can only submit the Local Board Final Report to EFSP once all of the LROs' statuses are **Approved** or **Did Not Report**. If you try to submit before all statuses are *Approved* or *Did Not Report*, a pop-up message will appear that reads "You cannot submit the Local Board Final Report to EFSP. All Final Report status should be *Approved/Did Not Report*."

3. Click the **Submit to EFSP** button or the **Click Here to Submit the Local Board Final Report to EFSP** button.

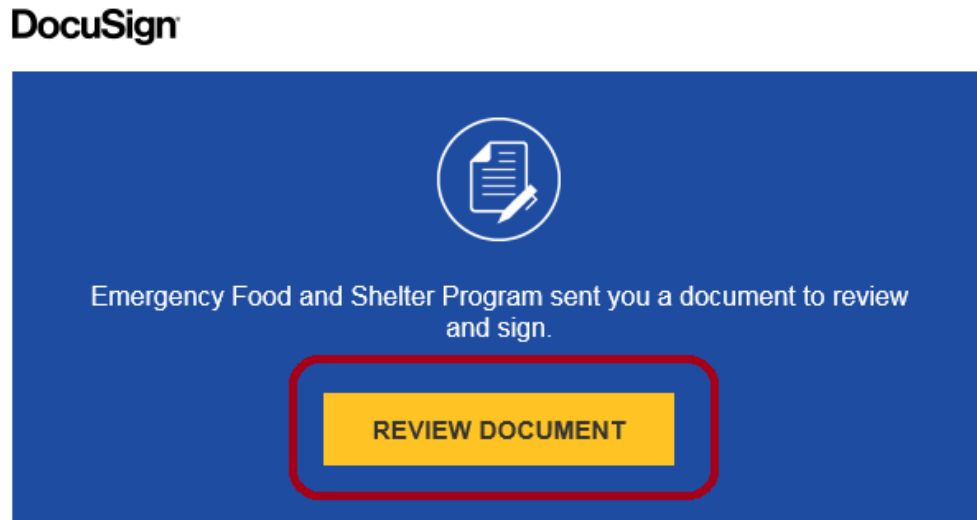
Final Report				Instructions and Guidance
Phase	35 ▼	Total Received Amount	\$7,305.00	Local Board Memorandum State Set-Aside Committee Memorandum Guidance for Submission of Spreadsheets Re allocations Guidance Fiscal Conduit Memorandum and Instructions Returned Funds Form Steps to Package Documentation Common Errors to Avoid/Final Report Self-Certification
Final Report Status	Pending - Final Report status will change after Local Board submits the Local Board Final Report to EFSP.			
Print LRO Submission Status Letter				
Click Here to Submit the Local Board Final Report to EFSP				
The Local Board Final Report may now be submitted to EFSP. Please click on "Click Here to Submit the Local Board Final Report to EFSP"				
Key Final Report Submit To EFSP  Disapprove  Delete LRO Final  View LRO Final Report  Graph (in Categories)				
LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00	LB	Approved

- A pop-up message appears that reads, "Are you sure you want to submit the LB Final Report to EFSP?"
- Click the **OK** button.
- A pop-up message appears that reads, "Final Report successfully submitted."
- Click the **OK** button.
- A pop-up message appears that reads, "Email for e-signing the LB Final Report has been successfully sent to the LB Contact."
- Click the **OK** button.

G. Electronic Signature for Local Board Final Report

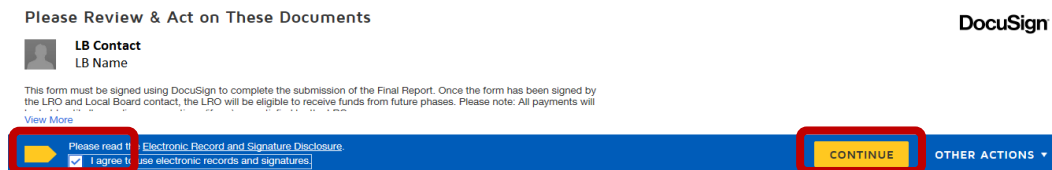
1. Review the DocuSign email.

Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



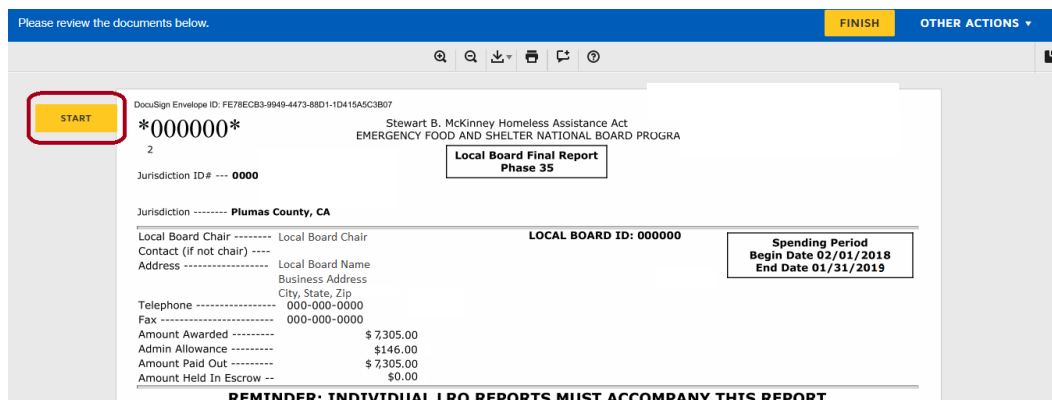
2. Agree to sign electronically.

Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.



3. Start the signing process.

Click the **Start** tag on the left to begin the signing process. You will be taken to the first field requiring action.



4. Select the Local Board's meeting frequency.

Select one radio button

FINISH OTHER ACTIONS

The signature below certifies that the Local Board for this jurisdiction has reviewed each LROs' Final Report for completeness, accuracy, and compliance with EFSP guidelines and that:

- * The spending period indicated is our agreed-upon spending period.
- * The LRO reports are signed, legible, and balanced. LROs not reporting are noted above.
- * The documentation has been reviewed and one, legible set separated by program category is enclosed, if required.
- * The returned funds are enclosed, if applicable.
- * The LRO's most recent (current) annual audit information is completed, if required.
- * The LRO reports certify the agency is not debarred or suspended from receiving Federal funds.
- * The administrative allowance taken by the Local Board and LROs does not exceed 2% of the jurisdiction's award.

CHOOSE

This confirms that this Local Board met quarterly in this phase. Do not submit minutes to the National Board. The National Board may request minutes at a later date.

This confirms that this Local Board met semi-annually in this phase. Minutes from both meetings are attached.

Sign

9/1/2020

Board Chair Signature Date

If the Local Board met semi-annually, you will be prompted to attach a copy of the minutes from **both** meetings. Click on the **first paperclip** to upload the first meeting minutes, and then click on the **second paperclip** to upload the second meeting minutes.

Select one radio button

FINISH OTHER ACTIONS

The signature below certifies that the Local Board for this jurisdiction has reviewed each LROs' Final Report for completeness, accuracy, and compliance with EFSP guidelines and that:

- * The spending period indicated is our agreed-upon spending period.
- * The LRO reports are signed, legible, and balanced. LROs not reporting are noted above.
- * The documentation has been reviewed and one, legible set separated by program category is enclosed, if required.
- * The returned funds are enclosed, if applicable.
- * The LRO's most recent (current) annual audit information is completed, if required.
- * The LRO reports certify the agency is not debarred or suspended from receiving Federal funds.
- * The administrative allowance taken by the Local Board and LROs does not exceed 2% of the jurisdiction's award.

CHOOSE

This confirms that this Local Board met quarterly in this phase. Do not submit minutes to the National Board. The National Board may request minutes at a later date.

This confirms that this Local Board met semi-annually in this phase. Minutes from both meetings are attached. **Please attach minutes from both meetings!**

Sign

9/1/2020

Board Chair Signature Date

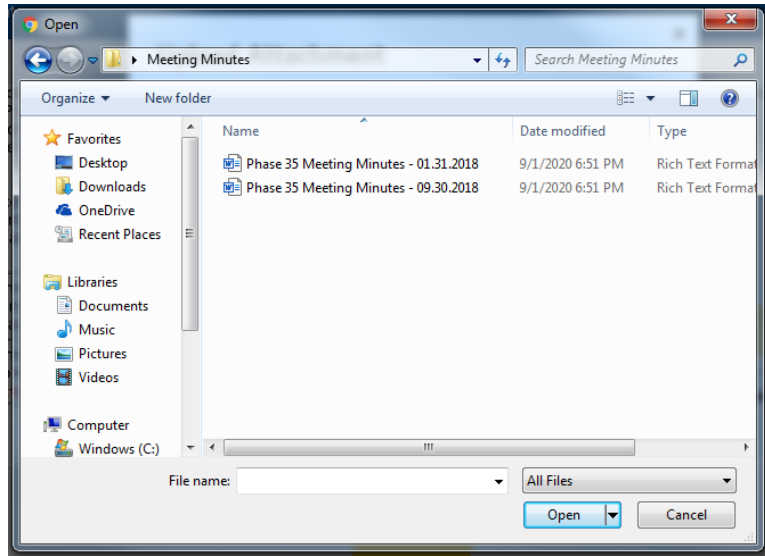
Click on **Upload A File** to attach the meeting minutes.

Upload Attachment

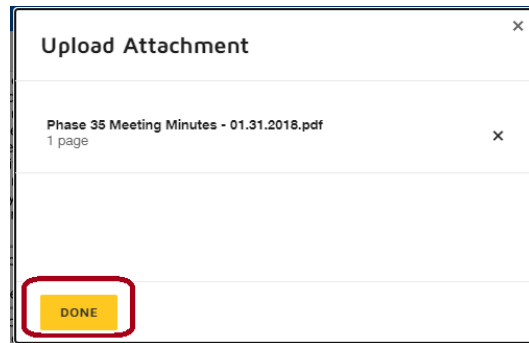
UPLOAD A FILE

DONE

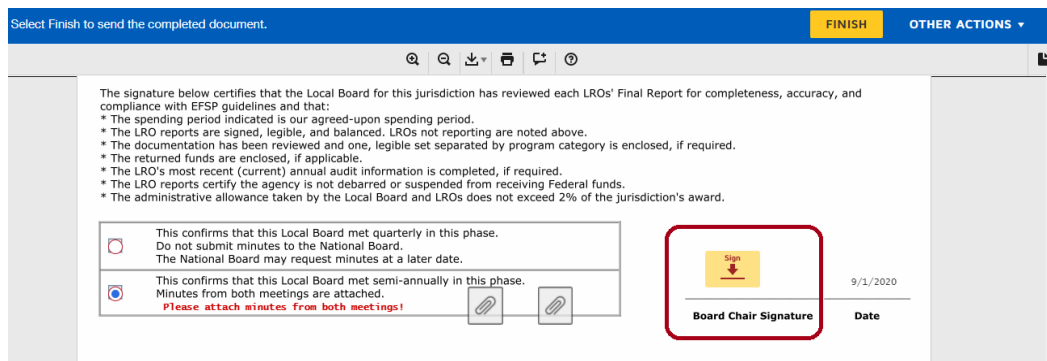
Choose a file and click **Open**.



After your meeting minutes have been selected, click **Done**.



5. After both meeting minutes are submitted, click the **Sign** tag. You will be asked to Adopt Your Signature.



6. **Verify that your name and initials are correct.** If not, change them as needed.

Adopt Your Signature

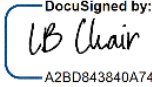

Confirm your name, initials, and signature.

Required

Full Name* **Initials***

[SELECT STYLE](#) **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:  DS 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

7. **Adopt a signature.** Do one of the following:
- Accept the default signature and initial style.
 - Click **Change Style**, and select a signature option.
 - Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

Adopt Your Signature

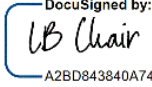

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

[SELECT STYLE](#) **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:  DS 
A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

8. Save your signature.

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Adopt Your Signature

Confirm your name, initials, and signature.


* Required

Full Name* **Initials***

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by: DS



A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL


9. Confirm signing.

When you finish signing the document, confirm signing by clicking **Finish**.

Done! Select Finish to send the completed document. **FINISH** OTHER ACTIONS ▾

The signature below certifies that the Local Board for this jurisdiction has reviewed each LRO's Final Report for completeness, accuracy, and compliance with EFSP guidelines and that:

- * The spending period indicated is our agreed-upon spending period.
- * The LRO reports are signed, legible, and balanced. LROs not reporting are noted above.
- * The documentation has been reviewed and one, legible set separated by program category is enclosed, if required.
- * The returned funds are enclosed, if applicable.
- * The LRO's most recent (current) annual audit information is completed, if required.
- * The LRO reports certify the agency is not debarred or suspended from receiving Federal funds.
- * The administrative allowance taken by the Local Board and LROs does not exceed 2% of the jurisdiction's award.

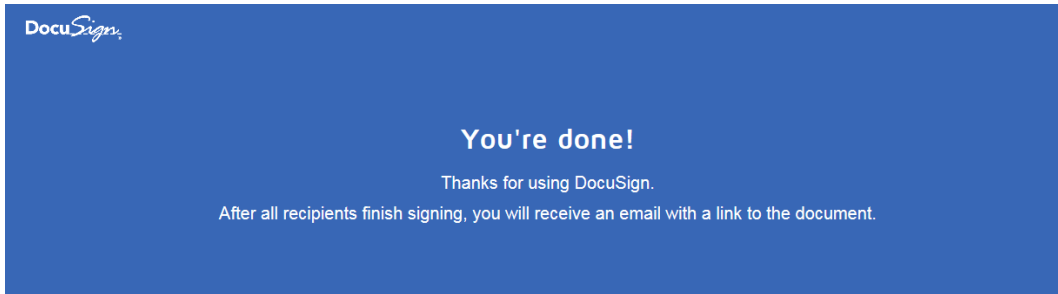
<input type="checkbox"/> This confirms that this Local Board met quarterly in this phase. Do not submit minutes to the National Board. The National Board may request minutes at a later date.	
<input checked="" type="checkbox"/> This confirms that this Local Board met semi-annually in this phase. Minutes from both meetings are attached. Please attach minutes from both meetings!	 9/1/2020

Board Chair Signature **Date**

You are given the option to log into DocuSign. This is NOT required for EFSP. Click the **NO THANKS** button, unless you have an existing account you would like to connect to.

The image shows a DocuSign login interface. On the left, there are input fields for 'Email' (pre-filled with 'sample@uwww.unitedway.org'), 'Password', 'Confirm Password', and a 'Country' dropdown menu. On the right, there are three icons with text: 'Electronically sign any document.', 'Get signatures from others.', and 'Sign on the go with DocuSign Mobile!'. At the bottom, there are two buttons: a yellow 'SUBMIT' button and a white 'NO THANKS' button with a red border.

A message appears stating that you have completed your document.



You can now download a PDF copy or print a copy of the e-signed documents on the EFSP website.

- Click on the pdf icon next to **View Final Report** to view/download the e-signed Local Board Final Report.

The screenshot shows a web interface for 'Final Report'. It includes a 'Phase' dropdown set to '35' and a 'Total Received Amount' of '\$7,305.00'. The 'Final Report Status' is 'Final Report has been submitted to EFSP.'. A link 'View LB Final Report' with a PDF icon is highlighted with a red box. Other links include 'Print Blank Local Board Report', 'Print Blank LRO Final Report', and 'Print LRO Submission Status Letter'. To the right is an 'Instructions and Guidance' sidebar with various links. At the bottom, there is a table with the following data:

LRO No.	LRO Name	Received Amount	Submitted By (LB/LRO)	Status
003	Sample Food Bank	\$4,655.00	LRO	Approved
010	Sample Shelter	\$2,650.00	LB	Approved

Note: You will not be able to view/download the Local Board Final Report until the signing process is complete by the Local Board.

The signed Local Board Final Report is generated.

DocuSign Envelope ID: FE78ECB3-9949-4473-88D1-1D415A5C3B07

000000 Stewart B. McKinney Homeless Assistance Act
EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM

2

Jurisdiction ID# --- 0000-00

**Local Board Final Report
Phase 35**

Jurisdiction ----- **Plumas County, CA**

Local Board Chair -----	Local Board Chair	LOCAL BOARD ID: 000000	Spending Period Begin Date 02/01/2018 End Date 01/31/2019
Contact (if not chair) ----			
Address -----	Local Board Name		
	Business Address		
	City, State, Zip		
Telephone -----	000-000-0000		
Fax -----	000-000-0000		
Amount Awarded -----	\$ 7,305.00		
Admin Allowance -----	\$146.00		
Amount Paid Out -----	\$ 7,305.00		
Amount Held In Escrow --	\$0.00		

REMINDER: INDIVIDUAL LRO REPORTS MUST ACCOMPANY THIS REPORT

List below all LROs not reporting and the amounts they have received. Use additional pages, if required.

The signature below certifies that the Local Board for this jurisdiction has reviewed each LROs' Final Report for completeness, accuracy, and compliance with EFSP guidelines and that:

- * The spending period indicated is our agreed-upon spending period.
- * The LRO reports are signed, legible, and balanced. LROs not reporting are noted above.
- * The documentation has been reviewed and one, legible set separated by program category is enclosed, if required.
- * The returned funds are enclosed, if applicable.
- * The LRO's most recent (current) annual audit information is completed, if required.
- * The LRO reports certify the agency is not debarred or suspended from receiving Federal funds.
- * The administrative allowance taken by the Local Board and LROs does not exceed 2% of the jurisdiction's award.

<input type="checkbox"/>	This confirms that this Local Board met quarterly in this phase. Do not submit minutes to the National Board. The National Board may request minutes at a later date.
<input checked="" type="checkbox"/>	This confirms that this Local Board met semi-annually in this phase. Minutes from both meetings are attached. Please attach minutes from both meetings!



DocuSigned by:
Local Board Chair 9/1/2020
24938624767E446

Board Chair Signature **Date**

The Local Board will also receive an email with the **signed document attached**, and the signed document appears in EFSP DocuSign account.

H. If the Local Board Final Report is Disapproved by EFSP

1. Click on the **View Comments** link to see disapproval comments given by EFSP.

Final Report	
Phase	35 ▼ Total Received Amount \$7,305.00
Final Report Status	Final Report has been disapproved by EFSP. View Comments Modify and resubmit Final Report to EFSP.
Print LRO Submission Status Letter	
Click Here to Submit the Local Board Final Report to EFSP	

2. Make necessary changes.
3. Repeat the steps to submit and e-sign Local Board Final Report to EFSP (F1-G7).

Phase End Date Extension Request

If a Local Board wishes to extend their Spending Period End Date beyond the initial end date that was selected in the Local Board Plan process, they may request an approved end date by submitting the Phase End Date Extension Request form

F. Generate Phase End Date Extension Request Form

1. Click on **Forms** on the main-menu.

The screenshot shows the EFSP website interface. The top navigation bar includes the EFSP logo, the text "Emergency Food and Shelter National Board Program", and a "Home | Sign Out" link. A user greeting "Welcome : LB Chair (LB-000000)" is visible. On the left, a vertical menu lists various options, with "Forms" highlighted by a red rectangular box. The main content area displays a table with three items related to "Phase 33 & 34 Clarifications".

Item No.	Phase 33 & 34 Clarifications	User Instructions
1	Phases 33 and 34 Local Board Plan Submission Deadline (as of 10/15/2017)	The National Board will continue to accept Local Board Plans for Phases 33 and 34 allocations. There is no penalty for submitting the plan late. However, the delay in submission of the Local Board Plan will cause delay in the processing and approving of the plan to release funds to LROs. EFSP staff is available to assist Local Boards with their Local Board Plans as needed. Please call 703-706-9660 for assistance. IMPORTANT: Please note, the latest date LROs may spend funds is January 31, 2018. The jurisdiction's spending end date is determined by the Local Board.
2	PHASE 33 FINAL REPORTS (as of 7/12/2017)	The Emergency Food and Shelter Program (EFSP) provided a deadline for submission of Final Reports for Phase 33 when award announcements were made in July 2016. The deadline was provided in the EFSP Key Changes Program Clarifications and Reminders document and Key Program Dates document, which are accessible on the EFSP website. However, given spending period extension to January 31, 2018 to allow LROs time to thoughtfully spend funds in their communities, Phase 33 funding continues to be issued and Phase 33 Final Reports have been delayed. Phase 33 Final Reports will be submitted together with Phase 34 Final Reports. More detail regarding Phase 33 Final Reports and the new due date for submission to the National Board will be provided at a later time. If you have questions regarding this message, please contact the staff at efsp@uwv.unitedway.org or 703-706-9660.
3	Important Message Regarding Submission of Forms (as of 6/29/2017)	When submitting required forms and certifications to the Emergency Food and Shelter Program (EFSP), please ensure the entire form is

The Forms screen appears.

The screenshot shows the "Forms" screen on the EFSP website. The top navigation bar is the same as in the previous screenshot. The left menu now has "Forms" selected. The main content area features a dropdown menu for "Phase" set to "34". Below this is a table listing various forms available for download.

Item No.	Forms	View
1	Phase End Date Extension Request Form	
2	Certification Regarding Lobbying	
3	LRO Certification	
4	Fiscal Agent/Fiscal Conduit Certification	
5	Sample Rent/Mortgage Form	
6	Metered Utility Verification Form	
7	Sample Spreadsheets	
8	Sample Per Diem Schedule	
9	Sample Per Meal Schedule	
10	Sample Mileage Log	

- Select the Phase from the **Phase** drop-down box.

Note: The Phase End Date Extension Request form can be submitted for the Current Phase only. The default Phase will always be the Current Phase.

The screenshot shows the EFSP website interface. At the top, it says "Welcome : LB Chair (LB-000000)". Below that is the "Emergency Food and Shelter National Board Program" header. On the left is a navigation menu with items like "EFSP Website Guide", "LB Policy Papers", "Forms", "DUNS", "Reports", "Board Plan", "Reallocation", "Interim & 2nd Pymt", "Final Report", "Variances", "Roster", "Manage LB Members", "Manage LRO", "Change Password", "Training Workshops", "What Makes Sense; What Works", "Key Program Dates", "Quick Reference Guides", "EFSP Manual", "Key Changes And Clarifications", and "Addendum To Program Manual". In the main content area, there is a "Phase: 34" dropdown menu. Below it is a table with 10 rows of forms. The first row is "Phase End Date Extension Request Form" with a document icon in the "View" column.

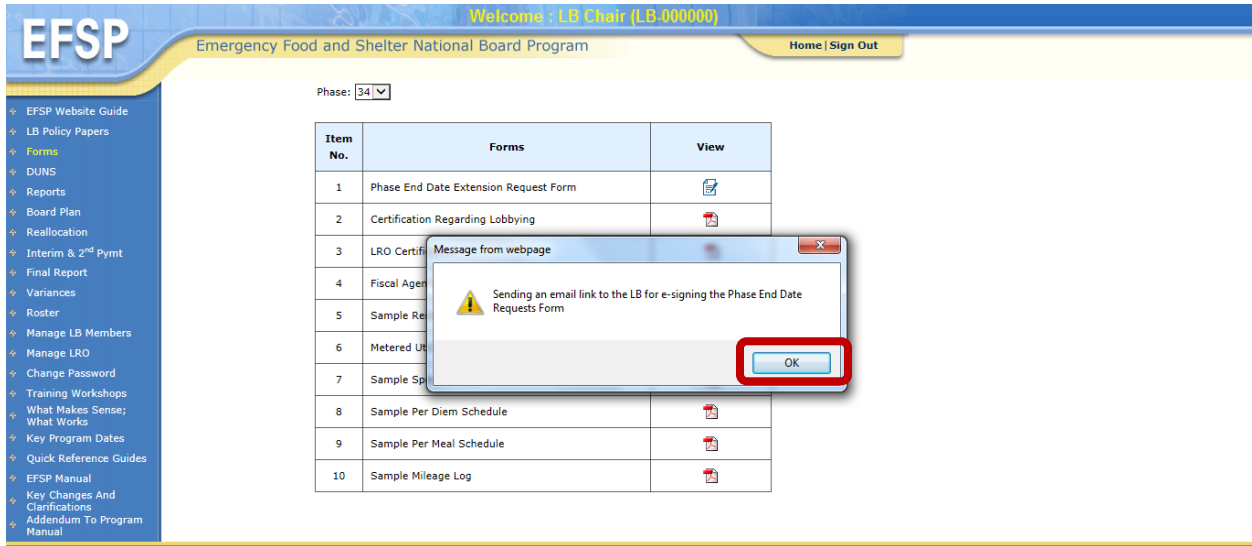
Item No.	Forms	View
1	Phase End Date Extension Request Form	
2	Certification Regarding Lobbying	
3	LRO Certification	
4	Fiscal Agent/Fiscal Conduit Certification	
5	Sample Rent/Mortgage Form	
6	Metered Utility Verification Form	
7	Sample Spreadsheets	
8	Sample Per Diem Schedule	
9	Sample Per Meal Schedule	
10	Sample Mileage Log	

- Click the View Document next to the Phase End Date Extension Request Form

This screenshot is similar to the previous one, but the "View" icon for the first row, "Phase End Date Extension Request Form", is highlighted with a red rectangle. The rest of the interface, including the navigation menu and the table of forms, is identical to the previous screenshot.

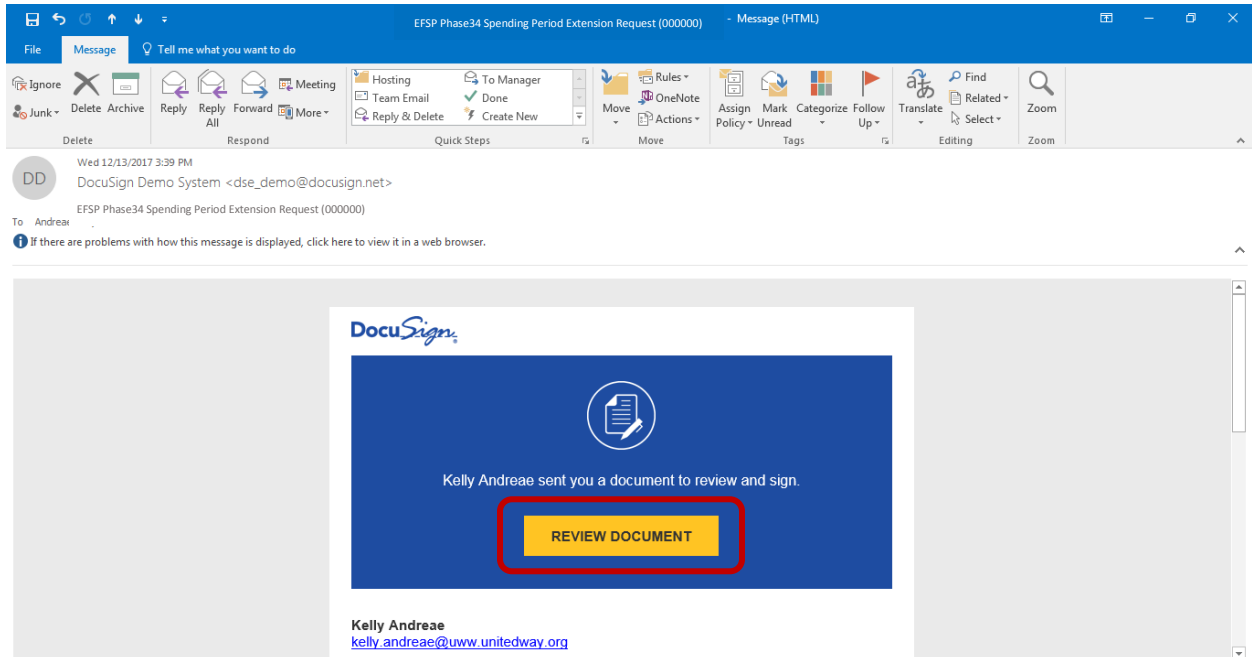
Item No.	Forms	View
1	Phase End Date Extension Request Form	
2	Certification Regarding Lobbying	
3	LRO Certification	
4	Fiscal Agent/Fiscal Conduit Certification	
5	Sample Rent/Mortgage Form	
6	Metered Utility Verification Form	
7	Sample Spreadsheets	
8	Sample Per Diem Schedule	
9	Sample Per Meal Schedule	
10	Sample Mileage Log	

- A pop up will appear that says “Sending an email link to the LB for e-signing the Phase End Date Request Form.” Click OK.



G. Electronic Signature

- Review the DocuSign email.
Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



- Agree to sign electronically.
Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.

Please Review & Act on These Documents



LRO Contact
LRO Name

This form must be signed using DocuSign to complete the submission of the Second Payment Request. Once the form has been signed by the LRO and Local Board, the second portion of the award will be released. Please note: Second payments will be held until all compliance exceptions (if any) are satisfied by the LRO.

[View Less](#)

Please review the documents below.

CONTINUE

OTHER ACTIONS ▾

3. Start the signing process

Click the **Start** tag on the left to begin the signing process. You are taken to the first field requiring action.

Please review the documents below.

FINISH OTHER ACTIONS ▾

DocuSign Envelope ID: 5335382F-6220-4D0D-815A-6ABA4285F5BC

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1760 - Seattle - Washington 98104 - (206) 451-9020
www.docuSign.com

START

Emergency Food and Shelter National Board Program
701 North Fairfax Street • Alexandria, VA 22314-2064
703-706-9660
Website: www.efsp.unitedway.org

Phase 34 Spending Period Extension Request Form

0000-00 Sample County, State
LB Contact
LB Organization Name
LB Address
City, State Zip

Should your Local Board wish to change the jurisdiction's spending period originally selected when the Phase 34 Local Board Plan was submitted, please complete this form in its entirety to change the end of the spending period. Please select one of the spending end dates below. Once selected by the Local Board, the option to extend the jurisdiction's spending period will apply to all Local Recipient Organizations (LROs) in the jurisdiction. In jurisdictions where more than one LRO is funded, extensions may not be requested for individual LROs.

No action is required if your Local Board does not wish to change the spending period originally selected.

<input type="checkbox"/> October 31, 2016	<input type="checkbox"/> November 30, 2016	<input type="checkbox"/> December 31, 2016	<input type="checkbox"/> January 31, 2017
<input type="checkbox"/> February 28, 2017	<input type="checkbox"/> March 31, 2017	<input type="checkbox"/> April 30, 2017	<input type="checkbox"/> May 31, 2017
<input type="checkbox"/> June 30, 2017	<input type="checkbox"/> July 31, 2017	<input type="checkbox"/> August 31, 2017	<input type="checkbox"/> September 30, 2017
<input type="checkbox"/> October 31, 2017	<input type="checkbox"/> November 30, 2017	<input type="checkbox"/> December 31, 2017	<input type="checkbox"/> January 31, 2018

DocuSign | Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2017 DocuSign Inc. | V2R

4. Select the new requested End Date from the options available by checking the appropriate box.

Select one radio button

0000-00 Sample County, State
LB Contact
LB Organization Name
LB Address
City, State Zip

Should your Local Board wish to change the jurisdiction's spending period originally selected when the Phase 34 Local Board Plan was submitted, please complete this form in its entirety to change the end of the spending period. Please select one of the spending end dates below. Once selected by the Local Board, the option to extend the jurisdiction's spending period will apply to all Local Recipient Organizations (LROs) in the jurisdiction. In jurisdictions where more than one LRO is funded, extensions may not be requested for individual LROs.

No action is required if your Local Board does not wish to change the spending period originally selected.

Required - RadiobuttonGrp - True

<input type="radio"/> October 31, 2016	<input type="radio"/> November 30, 2016	<input type="radio"/> December 31, 2016	<input type="radio"/> January 31, 2017
<input type="radio"/> February 28, 2017	<input type="radio"/> March 31, 2017	<input type="radio"/> April 30, 2017	<input type="radio"/> May 31, 2017
<input type="radio"/> June 30, 2017	<input type="radio"/> July 31, 2017	<input type="radio"/> August 31, 2017	<input type="radio"/> September 30, 2017
<input type="radio"/> October 31, 2017	<input type="radio"/> November 30, 2017	<input type="radio"/> December 31, 2017	<input type="radio"/> January 31, 2018

IMPORTANT: If your jurisdiction received Phase 33 and Phase 34 funding, remember the spending periods for both phases must end on the same date. The spending period for Phase 33 began the day after the selected end date for Phase 32. Please note, the begin spend date for Phase 34 is the same for all jurisdictions, October 1, 2016. If the Local Board extends the Phase spending period, the next funding cycle (Phase 35) will begin the day after the end of the Phase 33/34 spending period, if your jurisdiction receives funds.

My authorized signature below certifies the Local Board has approved the extension of the Phase 33/34 spending period as noted above and our Local Board has informed all of our LROs of this spending period. Please note, only the Local Board Chair or an authorized signature will be accepted to request the extension for the jurisdiction.

DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2017 DocuSign Inc. | V2R

Note: You will not be able to complete the signing process without selecting a new end date.

5. After you select a new end date, click the Next tag.

Select one radio button

0000-00 Sample County, State
LB Contact
LB Organization Name
LB Address
City, State Zip

Should your Local Board wish to change the jurisdiction's spending period originally selected when the Phase 34 Local Board Plan was submitted, please complete this form in its entirety to change the end of the spending period. Please select one of the spending end dates below. Once selected by the Local Board, the option to extend the jurisdiction's spending period will apply to all Local Recipient Organizations (LROs) in the jurisdiction. In jurisdictions where more than one LRO is funded, extensions may not be requested for individual LROs.

No action is required if your Local Board does not wish to change the spending period originally selected.

Required - RadiobuttonGrp - True

<input type="radio"/> October 31, 2016	<input type="radio"/> November 30, 2016	<input type="radio"/> December 31, 2016	<input type="radio"/> January 31, 2017
<input type="radio"/> February 28, 2017	<input type="radio"/> March 31, 2017	<input type="radio"/> April 30, 2017	<input type="radio"/> May 31, 2017
<input type="radio"/> June 30, 2017	<input type="radio"/> July 31, 2017	<input type="radio"/> August 31, 2017	<input type="radio"/> September 30, 2017
<input type="radio"/> October 31, 2017	<input type="radio"/> November 30, 2017	<input type="radio"/> December 31, 2017	<input type="radio"/> January 31, 2018

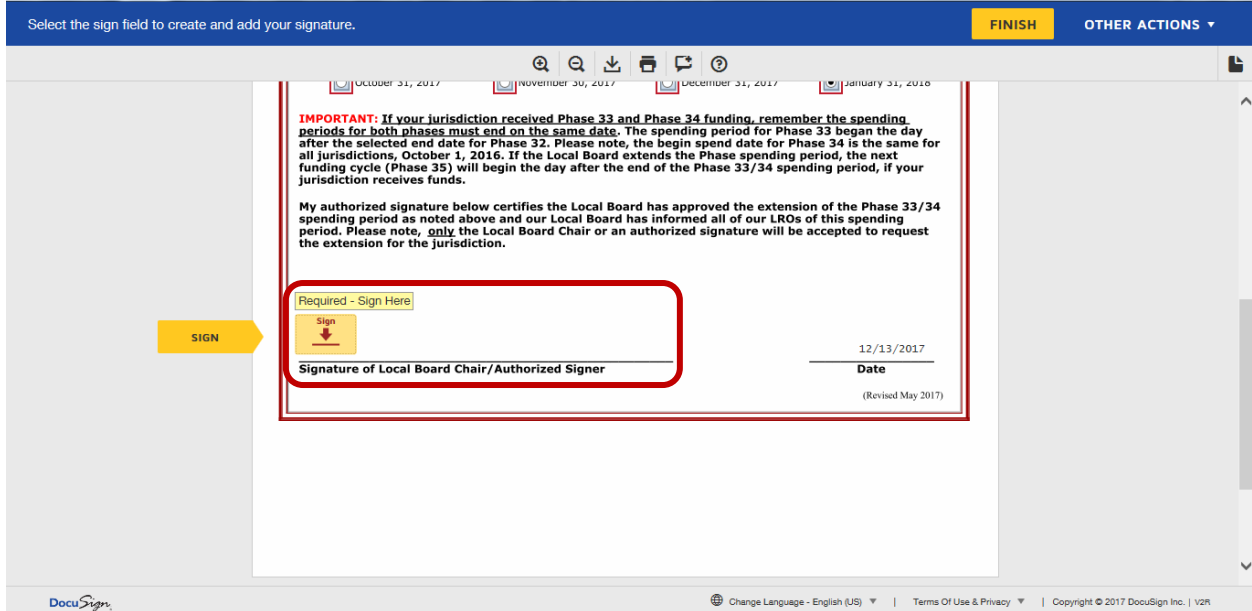
IMPORTANT: If your jurisdiction received Phase 33 and Phase 34 funding, remember the spending periods for both phases must end on the same date. The spending period for Phase 33 began the day after the selected end date for Phase 32. Please note, the begin spend date for Phase 34 is the same for all jurisdictions, October 1, 2016. If the Local Board extends the Phase spending period, the next funding cycle (Phase 35) will begin the day after the end of the Phase 33/34 spending period, if your jurisdiction receives funds.

My authorized signature below certifies the Local Board has approved the extension of the Phase 33/34 spending period as noted above and our Local Board has informed all of our LROs of this spending period. Please note, only the Local Board Chair or an authorized signature will be accepted to request the extension for the jurisdiction.

DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2017 DocuSign Inc. | V2R

6. Click the **Sign** tag. You are asked to Adopt Your Signature.



7. **Verify your name.**

Verify that your name and initials are correct. If not, change them as needed.

Adopt Your Signature

Confirm your name, initials, and signature.

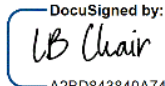

* Required

Full Name*	Initials*
<input type="text" value="LB Chair"/>	<input type="text" value="LC"/>

SELECT STYLE **DRAW**

PREVIEW [Change Style](#)

DocuSigned by:

A2BD843840A74C8...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN **CANCEL**

8. **Adopt a signature.** Do one of the following:

1. Accept the default signature and initial style.
2. Click **Change Style**, and select a signature option.
3. Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*

Initials*

[SELECT STYLE](#)
DRAW

PREVIEW [Change Style](#)

DocuSigned by:

LB Chair

A2BD843840A74C8...

DS

LC

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN
CANCEL

9. Save your signature.

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name*

Initials*

[SELECT STYLE](#)
DRAW

PREVIEW [Change Style](#)

DocuSigned by:

LB Chair

A2BD843840A74C8...

DS

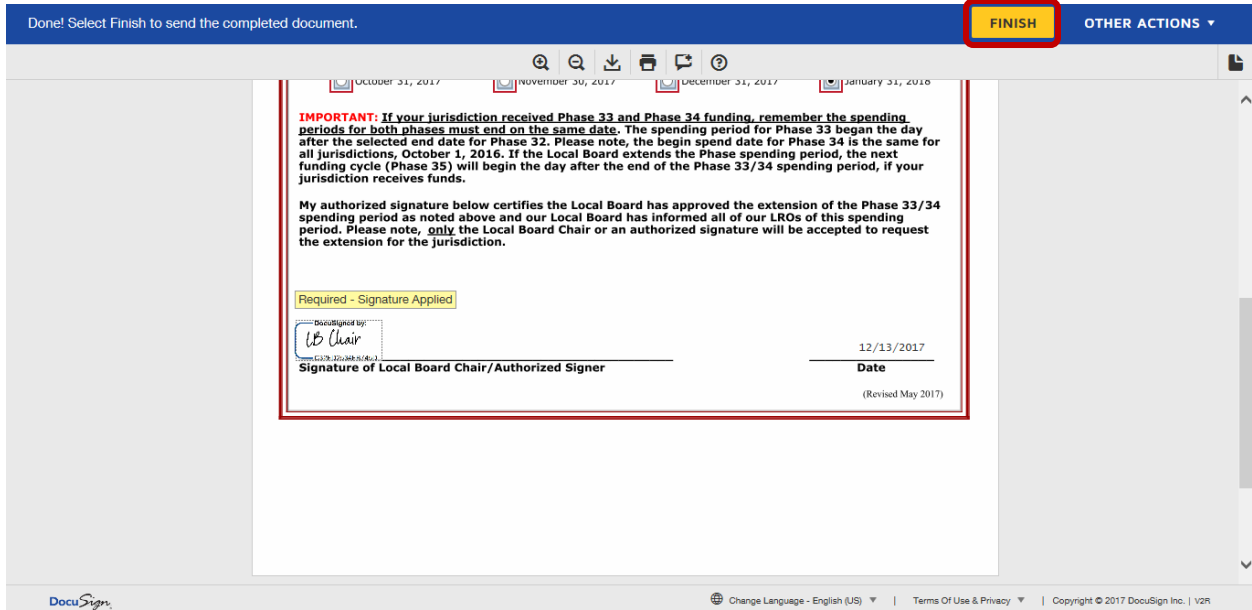
LC

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

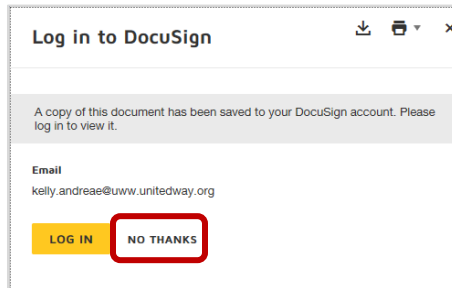
ADOPT AND SIGN
CANCEL

10. Confirm signing.

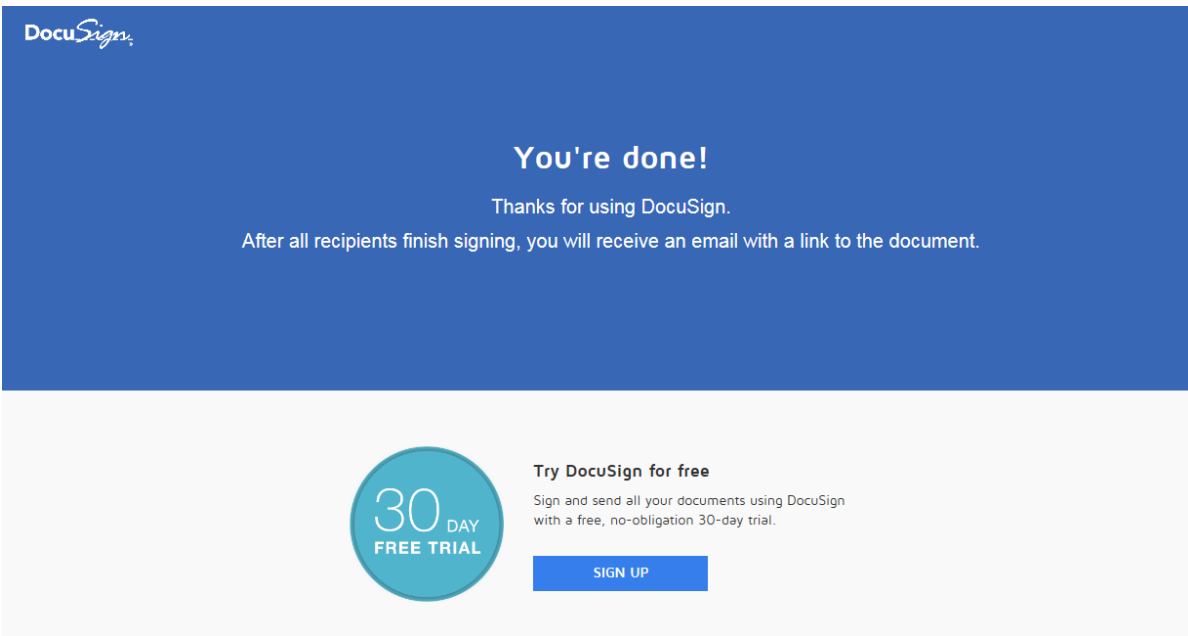
When you finish clicking all signature tags in the document, confirm signing by clicking **Finish**.



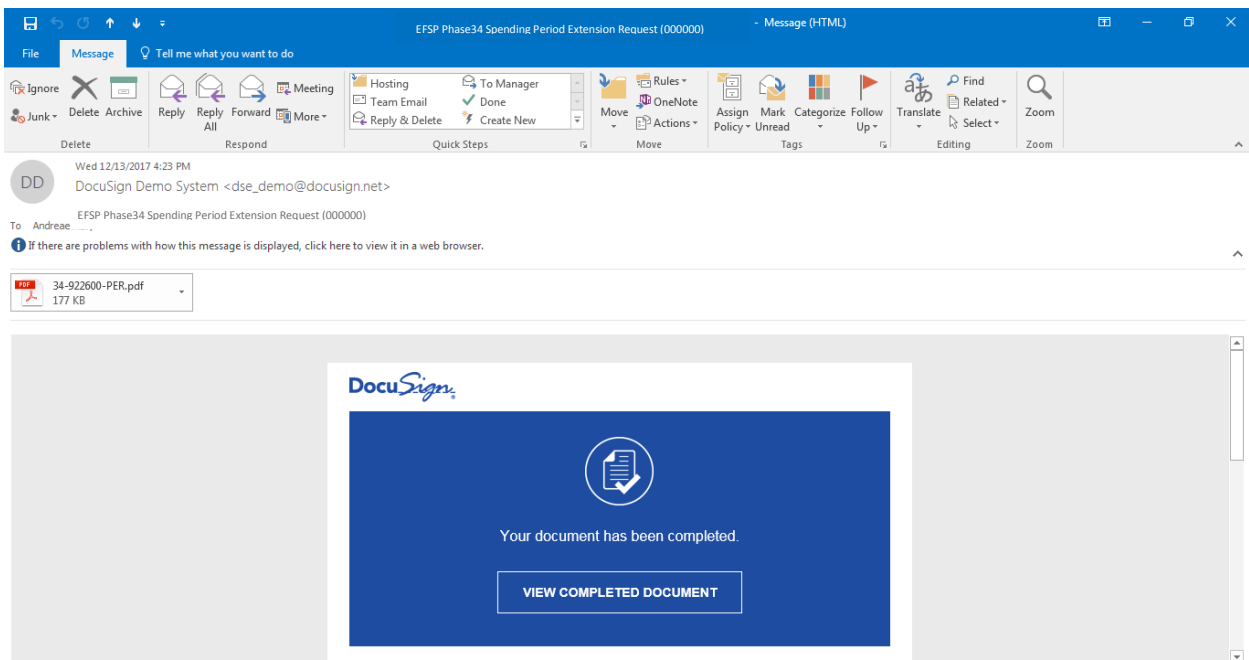
You are given the option to log into DocuSign. This is NOT required for EFSP. Click **No Thanks**, unless you have an existing account you would like to connect to.



A message appears stating that you have completed your document.



The Local Board will also receive an email with the signed document attached, and the signed document appears in EFSP DocuSign account.



Please download and save this form for your records as required by the EFSP Responsibilities and Requirements Manual.

Variations

Variations are requested by Local Boards, not LROs. Local Boards may request for Variations for itself or LROs at any Phase anytime. Sometimes variations for prior Phases are requested to resolve LRO compliance exceptions (clear LRO or to clear select PCE and advanced variance). Sometimes LBs will request variations in advance (prior to the beginning of a new Phase). Variations are to resolve compliance exceptions, make expenditures outside of EFSP guidelines, for LROs or for the entire jurisdiction. There is no minimum or maximum amount required to request variations. More than one variance from the same Phase or different Phases (prior, Current, next Phase) can be requested by LBs for an LRO during the year.

If the SSA wishes to award less than \$2,800 to a LB/Jurisdiction in the initial allocation, a variance request is required from the SSA to the National Board. SSA must also request a variance to fund directly funded/qualified LBs.

Variations are heard anytime by the National Board, although there are usually presented at National Board's Monthly meetings.

In the Variance main-menu, the Chair/Contact Person can create, modify, delete and submit Variance Request to EFSP.

In addition, in the Variance main-menu the Chair/Contact Person/Roster can view Variance Requests for any Phase.

A. View Existing Variance Request

1. Click on **Variations** on the main-menu.

Variance screen appears with the existing Variance Requests of the Current Phase.

The screenshot shows a web interface titled "Variations". At the top, there is a blue header with the text "Variations". Below the header, there is a link that says "Click here for New Variations Request". In the center, there is a dropdown menu labeled "Select Phase to view Variations :" with the value "35" selected. Below the dropdown is a table with the following columns: "LRO No.", "Category", "Amount", "Status", "Action", and "View". The table contains the text "No Variations found for Phase-35".

2. Select Phase from the **Select Phase to view Variance** drop-down box.

Note: *Variance Request report can viewed for any Phase. The default Phase will always be the Current Phase.*


4. Select Phase from the **Phase** drop-down box.

Note: *Variances can be requested for any Phase. The default Phase will always be the Current Phase.*

5. Check the **LB/LRO** radio button to select for whom **Variance Request** for.
If **LRO** radio button is checked, then select the desired LRO from the **LRO No.** drop-down box.

Note: *All the LROs appear in the drop-down.*

6. Enter the Variance Amount in the **Variance Amount** field.
7. Enter a category in the **Category** field.
OR
Select a category by clicking on the **Click** link.
 - Select **Category** window appears.
 - Select category from the **Category** drop-down box.
 - Click the **OK** button.
8. Select standard category from the **Select Category** drop-down box.
9. Enter the request note in the **Request** text box.
10. Enter additional information in the **Other Information** text box.
11. Click the **Save Variance Request** button to save new Variance request.
A pop-up message appears that says, “Variance Request saved successfully”
12. Click the **OK** button.
Variance screen appears with the new Variance Request details in the grid.


Variances					
Click here for New Variances Request					
Select Phase to view Variances : 35 ▼					
LRO No.	Category	Amount	Status	Action	View
000	Admin.	\$5,000.00		Modify / Delete / Submit to EFSP	

C. Modify a Variance Request

1. Click on **Variances** on the main-menu.
Variances screen appears with the existing Variance Requests of the Current Phase.
2. Select the Phase from the Select Phase to view Variance drop-down box.

Variance Requests for the selected Phase appears.

Note: *Variance Requests can be modified for any Phase until the Variance Request is submitted to EFSP.*


Variances					
Click here for New Variances Request					
Select Phase to view Variances : 35					
LRO No.	Category	Amount	Status	Action	View
000	Admin.	\$5,000.00		Modify / Delete / Submit to EFSP	

3. Select the desired **Variance Request** from the grid.
4. Click on **Modify** link under Action.
Edit Variance Request screen appears.
5. Edit the Variance Request details.
6. Click the **Update Variance Request** button.
A pop-up message appears that says, “Variance Request updated successfully”
7. Click the **OK** button.

D. Delete a Variance Request

1. Click on **Variances** on the main-menu.
Variances screen appears with the existing Variance Requests of the Current Phase.
2. Select the **Phase** from the Select Phase to view Variances drop-down box.
Variance Requests for the selected Phase appears.


Note: *Variance Requests can be deleted for any Phase until the Variance Request is submitted to EFSP.*

Variances					
Click here for New Variances Request					
Select Phase to view Variances : 35					
LRO No.	Category	Amount	Status	Action	View
000	Admin.	\$5,000.00		Modify / Delete / Submit to EFSP	


3. Select the desired **Variance Request** from the grid.
4. Click on **Delete** link under Action.
A pop-up message appears that says, “Are you sure to delete this Variance Request?”
5. Click the **OK** button.
A pop-up message appears that says, “Variance Request deleted successfully”.
6. Click the **OK** button.
Variances screen appears.

E. Submit Variance Request to EFSP

1. Click on **Variations** on the main-menu.
Variations screen appears with the existing Variance Requests of the Current Phase.
2. Select the **Phase** from the Select Phase to view Variations drop-down box.
Variance Requests for the selected Phase appears.

Variations					
Click here for New Variations Request					
Select Phase to view Variations : 35					
LRO No.	Category	Amount	Status	Action	View
000	Admin.	\$5,000.00		Modify / Delete / Submit to EFSP	

3. Select the desired **Variance Request** from the grid.
Click on **Submit to EFSP link** under Action.
A pop-up message appears that says, “Are you sure to submit this Variance Request to EFSP?”
4. Click the **OK** button.
A pop-up message appears that says, “Variance Request submitted to EFSP successfully”.
5. Click the **OK** button.
Variations screen appears with the Status as **Pending** and Action as **Submitted to EFSP**.

Variations					
Click here for New Variations Request					
Select Phase to view Variations : 35					
LRO No.	Category	Amount	Status	Action	View
000	Admin.	\$5,000.00	Pending	Submitted to EFSP	

EFSP can approve or disapprove a Variance Request.

- If the Variance Request is approved by EFSP then Status becomes:
EFSP Action: Accepted
NB Action: Pending
- If the Variance Request is approved by National Board then Status becomes:
EFSP Action: Accepted
NB Action: Approved
- If the Variance Request is approved by EFSP but disapproved by National Board then Status becomes:
EFSP Action: Accepted
NB Action: Disapproved

- If the Variance Request is disapproved by EFSP then Status becomes: **Disapproved**

Variances					
Click here for New Variances Request					
Select Phase to view Variances : 35 <input type="button" value="v"/>					
LRO No.	Category	Amount	Status	Action	View
010	Utilities Assist.	\$2,500.00	Disapproved View Comments	Modify / Submit to EFSP	
000	Admin.	\$5,000.00	EFSP Action: Accepted NB Action: Pending		

LB can modify and submit the Variance Request again to EFSP

- Click on **Modify** link under **Action**.
Edit Variance Request screen appears.
- Edit the Variance Request details
- Click the **Update Variance Request** button.
A pop-up message appears that says, “Variance Request updated successfully”
- Click the **OK** button.
- Click on **Submit to EFSP** link.
A pop-up message appears that says, “Are you sure to submit this Variance Request to EFSP?”
- Click the **OK** button.
A pop-up message appears that says, “Variance Request submitted to EFSP successfully”.
- Click the **OK** button.
Variances screen appears with the Status as **Pending** and Action as **Submitted to EFSP**.

Roster

In **Roster** main-menu, Chair/Contact Person/Roster can print the list of Local Board Roster with details.

A. Print List of Roster with details

1. Click on **Roster** on the main-menu.

Local Board Roster screen appears with the list of Roster.



The screenshot displays the 'Local Board Roster' interface. It features a list of organizations with their respective contact details. The organizations listed are United Way, Hotlines/Information and Referral, Salvation Army, Jewish Federation and other Jewish organization, and Catholic Charities and other Catholic org. (except St. Vincent de Paul). Each entry includes fields for Board Chair, Organization, Address, City, State, Zip, Phone, Fax, and Email. A 'Print' button is located at the bottom center of the screen.

Board Chair	Chair	Signer	Organization	Phone	Fax	Email
			United Way	555-555-5555	555-555-5555	
			Hotlines/Information and Referral	555-555-5555	555-555-5555	
			Salvation Army	555-555-5555		
			Jewish Federation and other Jewish organization	555-555-5555		
			Catholic Charities and other Catholic org. (except St. Vincent de Paul)	555-555-5555		

2. Click the **Print** button.

Local Board Roster list with details appears.

Manage Local Board Members

In **Manage LB Members** main-menu, Chair/Contact Person can view add, edit and delete Local Board Members' Information.

A. View Local Board Member's Information

1. Click on **Manage LB Members** on the main-menu.
LB Members List screen appears with the LB members' details in the grid.

The screenshot shows the 'LB Members List' interface. At the top, there are input fields for 'LB Number' (000000) and 'LB Name' (Sample County, State). Below these is a 'Search By Member Name' field. A toolbar contains icons for Add, Edit, Delete, Print Roster, and Refresh. The main area is a table with the following data:

LB Member	Affiliation	Chair	Signer	Contact	Phone
Board Chair	UW	Yes	Yes	No	555-555-5555
Board Contact	IR	No	Yes	Yes	555-555-5555
Board Member	SA	No	No	No	555-555-5555
Board Member	JF	No	No	No	555-555-5555
Board Member	CC	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555
Board Member	UW	No	No	No	555-555-5555
Board Member	HS	No	No	No	555-555-5555
Board Member	RC	No	No	No	555-555-5555
Board Member	CM	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555

At the bottom, there are navigation arrows, a 'Page 1 of 1' indicator, and a 'Showing 1 - 11 out of 11' status.

2. Enter the member's name in the **Search By Member Name** field.
The entered Member's information gets highlighted/selected.

Tip: Click the back and forward navigation arrows to navigate through pages.

3. Click the **Refresh** button on the **LB Members List** screen.

B. Add Local Board Member's Information

1. Click on **Manage LB Members** on the main-menu.
LB Members List screen appears with the LB members' details in the grid.
2. Click the **Add** button.

The **Local Board Member Information** screen appears.

The screenshot shows a web form titled "Add Local Board Member Information". The form is organized into several sections. At the top, there are fields for "Jurisdiction" (containing "000000" and "Sample County, State") and "Member of" (a dropdown menu). Below these are two checkboxes: "No Organization in area" and "Invited but didn't participate". The main section contains fields for "First Name", "Middle Name", "Last Name*" (marked compulsory), "Salutation", "Title", and "Organization". To the right of these fields is a section titled "This Member is:" with three checkboxes: "Chair", "Authorized to sign", and "Contact Person". Below these are fields for "Address*" (marked compulsory), "City-State-Zip*" (with a state dropdown menu set to "AL"), "Phone*" (with "Ext." and "Fax" sub-fields), "Email*", "Password", and "Confirm Password". At the bottom of the form are two buttons: "Save" and "Close".

3. Enter Local Board Member information in the respective fields.

Note: Compulsory fields are the one marked with *.

4. Click the **Save** button.
A pop-up message appears that says, "Board member added successfully".
5. Click the **OK** button.
LB Members List screen appears with the new LB Member information in the grid.
6. Click the **Refresh** button on the **LB Members List** screen.

C. Edit Local Board Member's Information

1. Click on **Manage LB Members** on the main-menu.
LB Members List screen appears with the LB members' details in the grid.
2. Click the **Edit** button.

The **Local Board Member Information** screen appears.

Edit Local Board Member Information			
Jurisdiction	000000	Sample County, State	
Member of*	UW - United Way		
<input type="checkbox"/> No Organization in area		<input type="checkbox"/> Invited but didn't participate	
First Name	Board	Middle Name	
Last Name*	Chair	Salutation	
Title	Title		
Organization	Organization		
Address*	Address		
City-State-Zip*	City	- State	- 00000
Phone*	555-555-5555	Ext.	Fax
Email*	kelly.andreae@uww.unitedway.org		
Password	*****	Confirm Password	*****
<input type="button" value=" <"/> <input type="button" value="<"/> <input type="button" value=">"/> <input type="button" value="> "/> <input type="button" value="Save"/> <input type="button" value="Delete"/> <input type="button" value="Close"/>			

3. Edit the information.
4. Click the **Save** button
A pop-up message will appear that says, “Board Member information updated successfully.”
5. Click the **OK** button.
LB Members List screen appears with the updated LB Member information in the grid.
6. Click the **Refresh** button on the **LB Members List** screen.

D. Delete Local Board Member's Information

1. Click on **Manage LB Members** on the main-menu.
LB Members List screen appears with the LB members' details.

The screenshot shows the 'LB Members List' interface. At the top, there are input fields for 'LB Number' (000000) and 'LB Name' (Sample County, State). Below these is a search box labeled 'Search By Member Name'. A toolbar contains icons for 'Add', 'Edit', 'Delete', 'Print Roster', and 'Refresh'. The main area is a table with the following data:

LB Member	Affiliation	Chair	Signer	Contact	Phone
Board Chair	UW	Yes	Yes	No	555-555-5555
Board Contact	IR	No	Yes	Yes	555-555-5555
Board Member	SA	No	No	No	555-555-5555
Board Member	JF	No	No	No	555-555-5555
Board Member	CC	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555
Board Member	UW	No	No	No	555-555-5555
Board Member	HS	No	No	No	555-555-5555
Board Member	RC	No	No	No	555-555-5555
Board Member	CM	No	No	No	555-555-5555
Board Member	GV	No	No	No	555-555-5555

At the bottom, there is a pagination control showing 'Page 1 of 1' and 'Showing 1 - 11 out of 11'.

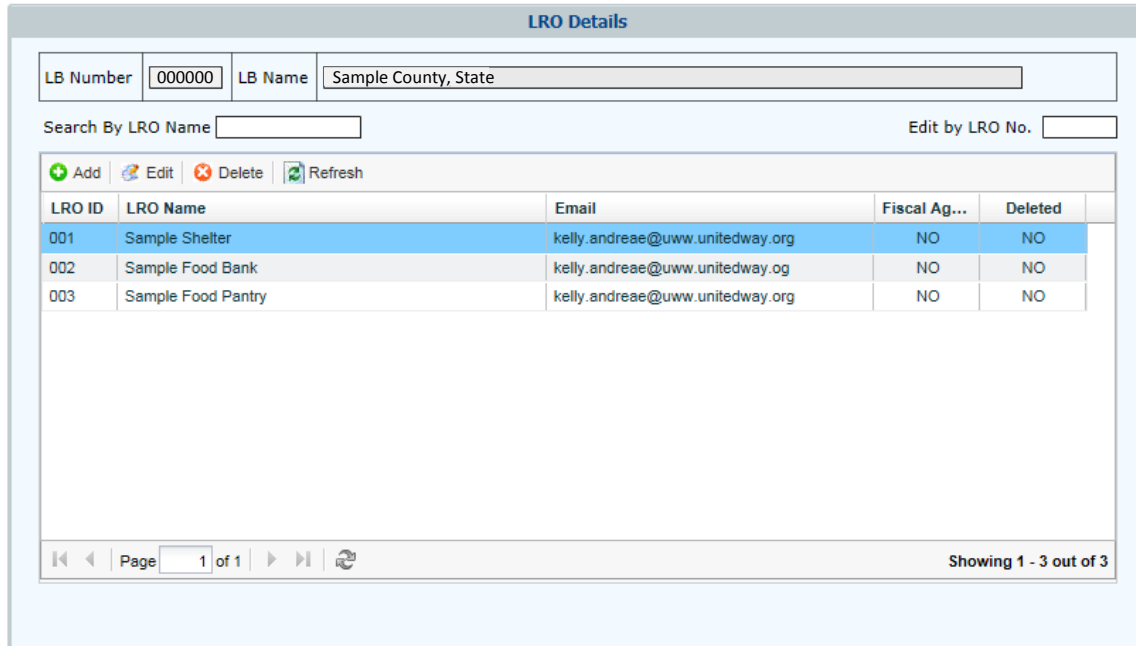
2. Select the LB Member from the grid.
3. Click the **Delete** button.
A pop-up message appears that says, "Are you sure to delete this Board Member".
4. Click the **Yes** button.
A pop-up message appears that says, "Board Member deleted successfully".
5. Click the **OK** button.
LB Members List screen appears.
6. Click the **Refresh** button on the **LB Members List** screen.

Manage LROs

In the **Manage LRO** main-menu, Chair/Contact Person of the Local Board can view, add, edit and delete LRO Member's Information.

A. View LRO Information

1. Click on **Manage LRO** on the main-menu.
LRO Details screen appears with the LRO details in the grid.



The screenshot shows the 'LRO Details' interface. At the top, there are input fields for 'LB Number' (000000) and 'LB Name' (Sample County, State). Below these are search and edit fields: 'Search By LRO Name' and 'Edit by LRO No.'. A toolbar contains 'Add', 'Edit', 'Delete', and 'Refresh' buttons. The main area is a table with the following data:

LRO ID	LRO Name	Email	Fiscal Ag...	Deleted
001	Sample Shelter	kelly.andreae@uww.unitedway.org	NO	NO
002	Sample Food Bank	kelly.andreae@uww.unitedway.org	NO	NO
003	Sample Food Pantry	kelly.andreae@uww.unitedway.org	NO	NO

At the bottom, there is a pagination control showing 'Page 1 of 1' and 'Showing 1 - 3 out of 3'.

2. Enter the LRO's name in the **Search By LRO Name** field.
The entered LRO's information gets highlighted/selected.
3. Click the **Refresh** button on the **LRO Details** screen.

B. Add LRO Information

1. Click on **Manage LRO** on the main-menu.
LRO Details screen appears with the LRO details in the grid.

LRO Details

LB Number	<input type="text" value="000000"/>	LB Name	<input style="width: 100%;" type="text" value="Sample County, State"/>		
Search By LRO Name		<input type="text"/>		Edit by LRO No. <input type="text"/>	

Add
 Edit
 Delete
 Refresh

LRO ID	LRO Name	Email	Fiscal Ag...	Deleted
001	Sample Shelter	kelly.andreae@uww.unitedway.org	NO	NO
002	Sample Food Bank	kelly.andreae@uww.unitedway.org	NO	NO
003	Sample Food Pantry	kelly.andreae@uww.unitedway.org	NO	NO

Page of 1
Showing 1 - 3 out of 3

2. Click the **Add** button.
The **LRO Information** screen appears.

LRO Information

LB No.	<input type="text" value="000000"/>	LB Name	<input style="width: 100%;" type="text" value="Sample County, State"/>		
LRO No.	<input type="text" value="004"/>	LRO Name*	<input type="text"/>		

Contact*	<input type="text"/>	Salut.	<input type="text"/>	Affiliation	<input type="text"/>
Address*	<input type="text"/>	Target1	<input type="text"/>		
	<input type="text"/>	Target2	<input type="text"/>		
	<input type="text"/>	Target3	<input type="text"/>		
City-State-Zip*	<input type="text"/>	AL	<input type="text"/>	HC Access	<input type="checkbox"/>
EIN of LRO	<input type="text"/>	Fiscal Agent	<input type="checkbox"/>		
Phone*	<input type="text"/>	Ext	<input type="text"/>	Fax	<input type="text"/>
Email*	<input type="text"/>			Password	<input type="text"/>
Web Site	<input type="text"/>			Confirm Password	<input type="text"/>

3. After the information has been entered, Click **Save**.

Note: You cannot update the Organization name, FEIN, DUNS number, and bank account information from the website. The required forms to update that information is available on the EFSP website under **EFT** or **DUNS**.

4. A pop-up message will appear that says, “LRO added successfully.”

C. Edit LRO Information

1. Click on **Manage LRO** on the main-menu.
LRO Details screen appears with the LRO details in the grid.
2. Select the desired LRO from the grid.
3. Click the **Edit** button.
OR
Enter the LRO number in the **Edit LRO No.** field.

LRO Information screen appears.

LRO Information			
LB No.	000000	LB Name	Sample County, State
LRO No.	001-Sample Shelter		
LRO Name	Sample Shelter	<input type="checkbox"/> Deleted	
Contact	LRO Contact	Salut.	<input type="text"/>
Address	Address		Target1
	<input type="text"/>		Target2
	<input type="text"/>		Target3
City-State-Zip	City	<input type="text"/>	00000
EIN of LRO	<input type="text"/>		Fiscal Agent <input type="checkbox"/>
ABA No.	<input type="text"/>	DUNS No.	<input type="text"/>
Phone	555-555-5555	Ext	<input type="text"/>
Email	kelly.andreae@uww.unitedway		Confirm Password
Web Site	<input type="text"/>		
<input type="button" value=" < < > > "/> <input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Undo"/> <input type="button" value="Close"/>			

Note: You cannot update the Organization name, FEIN, DUNS number, and bank account information from the website. The required forms to update that information is available on the EFSP website under **EFT** or **DUNS**.

4. Click the **Edit** button.
5. Edit the information.
6. Click the **Save** button.
A pop-up message appears that says, “LRO information updated successfully”.
7. Click the **OK** button.

D. Delete LRO Information

1. Click on **Manage LRO** on the main-menu.
LRO Details screen appears with the LROs details in the grid.

2. Select the desired LRO from the grid.

LRO Details

LB Number LB Name

Search By LRO Name Edit by LRO No.

LRO ID	LRO Name	Email	Fiscal Ag...	Deleted
001	Sample Shelter	kelly.andreae@uww.unitedway.org	NO	NO
002	Sample Food Bank	kelly.andreae@uww.unitedway.org	NO	NO
003	Sample Food Pantry	kelly.andreae@uww.unitedway.org	NO	NO

Showing 1 - 3 out of 3

3. Click the **Delete** button.
A pop-up message appears that says, “Are you sure to Delete LRO -#. Click on OK to Change Status!”
4. Click the **OK** button.
A pop-up message appears that says, “LRO updated successfully”.
5. Click the **OK** button.
LRO Details screen appears with the **Deleted** status of the LRO as **YES**.

Search By LRO Name Edit by LRO No.

LRO ID	LRO Name	Email	Fiscal Ag...	Deleted
001	Sample Shelter	kelly.andreae@uww.unitedway.org	NO	YES
002	Sample Food Bank	kelly.andreae@uww.unitedway.org	NO	NO
003	Sample Food Pantry	kelly.andreae@uww.unitedway.org	NO	NO

Showing 1 - 3 out of 3

Training Workshops

In **Training Workshops** main-menu, Local Board members can view recorded Training Webinars.

Click on **Training Workshops** on the main-menu.

EFSP Welcome : Board Contact (LB-003400)
Emergency Food and Shelter National Board Program Home | Sign Out

Training Workshops

The Emergency Food and Shelter National Board Program (EFSP) offers webinar training opportunities for both Local Boards and Local Recipient Organizations (LROs). The trainings are designed to assist Local Boards and LROs in the administration of the EFSP. As trainings are offered, they will be recorded and added to the website as an additional tool for Local Boards and LROs.

Recorded Training Webinars

Below are the webinars that have been recorded to date. Each webinar includes a question and answer session. Please take the opportunity to view these at your convenience. If after viewing the webinars, you have additional questions, please contact the National Board staff.

- To view the **What is DocuSign** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Second Payment Request & Interim Report (for LROs)** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Second Payment Request & Interim Report (for Local Boards)** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Eligible and Ineligible Expenditures** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Reallocation** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Audit Requirements** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **EFT** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Local Board Plan** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Certifications Forms** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **EFSP Overview** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Final Reports (for LROs)** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).
- To view the **Final Reports (for LBs)** webinar, please click [here](#). For a pdf copy of the PowerPoint for this webinar, please click [here](#).

What Makes Sense; What Works

In **What Makes Sense; What Works** main-menu, Local Board members can view EFSP Technical Assistance Manual entitled ‘What Makes Sense: What Works’.

Click on **What Makes Sense; What Works** on the main-menu.

The screenshot shows the EFSP website interface. At the top, there is a blue header with the EFSP logo on the left, the text 'Welcome : Board Contact (LB-003400)' in the center, and 'Home | Sign Out' on the right. Below the header is a yellow banner with the text 'Emergency Food and Shelter National Board Program'. The main content area is divided into two columns. The left column is a blue navigation menu with a list of links: EFSP Website Guide, LB Policy Papers, Forms, DUNS, Reports, Board Plan, Reallocation, Interim & 2nd Pymt, Final Report, Variances, Roster, Manage LB Members, Manage LRO, Change Password, Training Workshops, **What Makes Sense; What Works** (highlighted), Key Program Dates, Quick Reference Guides, EFSP Manual, Key Changes And Clarifications, and Addendum To Program Manual. The right column contains the main content. It starts with a section titled 'Good Practices' and a paragraph: 'The National Board published the EFSP Technical Assistance Manual entitled **What Makes Sense: What Works** in 1993. We are reproducing that manual here to broaden its availability. The referrals and points of contact may no longer be valid. If you have questions, comments or suggestions, please contact the EFSP National Board staff.' Below this is another section titled 'What Makes Sense: What Works' and a paragraph: 'Each year the Emergency Food and Shelter (EFS) Program provides supplemental funding to over 12,000 agencies in more than 2,500 communities across the country. Additionally, EFS staff conduct site visits and training workshops and meet with numerous agency staff members each year.' This is followed by another paragraph: 'Through this exchange of ideas we have seen the creativity and innovation that many local boards and local recipient organizations have brought to this program. The purpose of the Technical Assistance Manual, **What Makes Sense: What Works**, is to share some of those ideas and practices with you.' Then another paragraph: 'Around the nation EFSP local board members and staff and recipient organization staff have taken the framework of our guidelines and expanded them into administrative and service delivery systems that have increased community-wide participation - with fairness in application and targeting to those in need as the two key considerations.' This is followed by a paragraph: 'The EFS program at times suffers from its simplicity. Because the administrative allowance is small, no one, not a city or county government nor one non-profit agency, really "owns" this unique program. The work and though that is put into it can only be equal to the initiative and commitment that local communities bring to it. In a fundamental way, the EFS Program's statue and success mirrors the very real efforts and concerns of people at the local level who have chosen to help homeless and hungry people.' Then another paragraph: '**What Makes Sense: What Works** is a compendium of the genius and dedication that have made this program work. The entries here are written by the participants themselves. And we've included contact points with each piece if you wish to follow up form more information.' Finally, a paragraph: 'About the title - we named this Technical Assistance Manual **What Makes Sense: What Works** because that is how many of the EFS local boards and local recipient organizations invariably explain how they arrived at some of their best ideas and solutions. It is exactly that sense of the practical, that local boards are in the best position to assess needs and monitor programs in their communities, that is the basis of the EFS Program.' The page ends with a paragraph: 'The ideas that appear here are **not mandated** but they are outstanding practices that are worthy of replication. Some of the examples will not be a perfect fit for every community; either regarding local board practices or how agencies target client eligibility. That is why we have tried to'.

Key Program Dates

In **Key Program Dates** main-menu, Local Board members can print the important due dates (deadlines) of Current Phase.

Click on **Key Program Dates** on the main-menu.

The screenshot shows the EFSP website interface. At the top, there is a blue header with the EFSP logo on the left, the text "Emergency Food and Shelter National Board Program" in the center, and a welcome message "Welcome : Board Contact (LB-003400)" on the right. Below the header, there are navigation links for "Home" and "Sign Out". A dropdown menu for "Phase:" is set to "35". On the left side, there is a blue sidebar menu with various options, including "Key Program Dates" which is highlighted in yellow. The main content area displays a table with the following data:

Item No.	Key Program Dates	View
1	Key Program Dates - Phase 35	