

COHORT 3 GO LIVE EMAIL 5/31/17

To: Cohort 3 Members
Subject: FDP Expanded Clearinghouse – Cohort 3
Attachments: pdf of Go live Email; Full Instructions; POC listing

Hello Cohort 3 Piloteers!

The FDP Expanded Clearinghouse Cohorts 1 and 2 welcome you into the fold! The Clearinghouse is now ready for you to enter, certify and submit your profile. To do so, please do the following.

- 1. Read the overview and notes below in this email (pdf also attached)** - these are initially intended for the Profile Points of Contact at Pilot Organizations as they will be the first ones able to log in. But this information is useful for all that will interact with the system!
- 2. Fully read the attached detailed system instructions** to become familiar with the system functionality.
- 3. For HELP** using the system (or comments or feedback) please email fdpechhelp@gmail.com. Please do not email the entire list of users.
- 4. Please enter your profile and submit to FDP by COB on Friday June 16th**. This will allow us enough time to complete the FDP review, get any needed corrections done, and publish your profile for our anticipated July 5th official “Go-Live” with Cohort 3.

HOW TO GET STARTED

The following steps are described below to create/complete/submit/certify and publish your profile:



STEP 1: CREATE ORGANIZATION

Initial login to the system:

- 1) The system URL is fdpclearinghouse.org
- 2) The Profile Point of Contact (POC) for your Profile/Organization (see attached list) will be set up as “Organizational Owner” later today. Once set up, the POC will receive an email from fdpechhelp@gmail.com containing their password. The user login will be the POC’s email address.

**Only Organizational Owners will be able to initially log in. They will be responsible for creating other users at their organization. Organization Owners have automatic “User Manager” and “Profile Editor” authorization rights and will also assign the “Profile Certifier” role to an Authorized Organizational

Representative at their organization. The Certifier role may be held by only one official at a time in the system. The Certifier role can be held by the Organizational Owner if that person is also an AOR for the entity. See Step 2 for more information about managing roles and adding permissions.

Help page with system instructions and web demo

- 3) Once logged in, navigate to “Help” on the main navigation bar and read through the instructions for detailed information about the system (also attached to this email). An informal, but very helpful, web demo has been recorded to help orient you to the system in addition to reading the instructions. The video may be viewed by clicking *View the instructional video* also located under “Help”.
- 4) Please note: Throughout the profile, question mark icons are located in the top right corner or by some specific sections. Clicking on the question mark will take the user to the instructions associated with the section of the profile being completed.

Create / “Add Organization”

- 5) After reading the Instructions, the Organizational Owner can now create an Organization Profile by clicking “Add Organization” and entering Profile information.

The first page requires four pieces of information to create a Profile:

- Legal Entity Name (should match the SAM record for your DUNS)
- Common Name (enter your entity’s name as you want it to be displayed/searched for in the “Participating Organizations” section of the Clearinghouse)
- Primary EIN
- Primary DUNS.

** A Profile must be created first before additional users can be created.

STEP 2: COMPLETE / SUBMIT PROFILE

Setting up additional “Users” in the system - difference between Contacts and Users

- 6) Once the Organization Profile has been created/saved, additional organization “Users” may be granted access the system by creating a login account. While the Profile is in Draft/Edit mode, click the “Manage Users” button at the top right of the screen to create the new user account or to edit the rights granted to the Org Owner role.

To add a User: Click “+Add User” and complete the user’s information and select one or more permissions: Profile Editor, Profile Creator and/or Profile Certifier.

To edit a User (including Org Owner): Click on the user profile and select or deselect permissions. The Org Owner is set up by default as a Profile Editor and Profile Creator. This person may also hold the role of Profile Certifier if applicable to your organization (see below).

Profile Certifier Role: There can be only ONE Profile Certifier, and this person MUST be an Authorized Organizational Representative of your organization. For some organizations, the Profile Certifier is the same person as the Organizational Owner. If this is true for your organization, the role can be added to the Org Owner’s set of duties under the “Manage Users” tab.

Email addresses: Currently, the system requires every user to have a unique email address. This means that a generic email address (e.g., spa@organization.edu) cannot be used by more than one user.

This is on a list for consideration for potential future enhancement, but no decisions have been made at this time.

- 7) The “Contacts” tab/section is to add contact names and titles to the profile, such as Primary Contact, SAM Point of Contact, FFATA Contact, and so on. Adding contacts to the profile does not create an automatic “User” account for the contact. The “Contacts” tab/section appears after clicking “Save” on the Add New Organization Page and the Profile opens into multiple tabs.

**Please see the detailed instructions for more information regarding “Contacts” and “Users.”

- 8) Complete your profile by moving through the tabs at the top and entering all information. Note that if you used the optional “Organizational Worksheet” you can cut and paste most information from that sheet. Having two monitors side-by-side (if you have this) make the process very efficient. Some selections use dropdowns and cannot be copied. All questions (except comment boxes) require a response.

Submitting your Profile

- 9) Once all information has been entered and your Profile is complete, navigate to the “Authorization” tab. If any information has been missed or entered incorrectly, a list of errors will appear under *Profile Validation*. Should there be an error, navigate back to the appropriate section to add or update missing or incorrect data. Please double check for the following common error:

- Please enter BOTH your old and your new PHS/OLAW numbers in the space provided for that information on the “Assurances” tab. It should look something like: “D16-00288 (A3456-01)” when you are done.

- 10) When there are no validation errors, the Profile may be submitted to the Profile Certifier by selecting “Submit for Certification”.

**Please note that when one User has all permissions they will still be required to perform all steps.

STEP 3: CERTIFY PROFILE

- 11) The Profile Certifier will receive a notification email to log into the system, review and certify the Profile for the organization. Certifying will submit the Profile to FDP for review, approval and publishing.

STEP 4: PUBLISH PROFILE

- 12) FDP administrators review submitted Profiles regularly and, if all information appears appropriate, will approve and publish the Profile. You will receive an email from the FDP administrator who reviewed your profile verifying that it has been approved. It will then become publicly viewable when Cohort 3 goes live (expected to be on or around July 5th). If the FDP administrator found errors, the system will generate an email to the Org Owner showing that the profile has been returned for correction, and including a list of what needs to be fixed. Simply fix the errors, re-submit and re-certify the profile, and it will come back to the FDP administrators for final review and publishing. You may contact fdpechelp@gmail.com at any time if you have questions about why your profile was rejected or how to fix it.

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### ***Retracting or Updating a Profile***

- 13) Users can “retract” Profiles once they have been submitted by a Profile Editor or certified by a Profile Certifier. The Profiles must be retracted in the exact reverse order of the process described above. Only Profile Certifiers can retract from request to publish and then Profile Editors can retract from Profile Certifiers. This function is rarely used.
- 14) Users can “update” their published Profile by selecting it from their “My Dashboard”, making the appropriate updates and submitting it back to the Profile Certifier. Updates must also go through the same process as described above for certifying, submission, approval and publishing.
- 15) The previously published Profile will stay in place until the updated Profile is fully approved and published.

### ***Other Features to Note:***

- All fields must be completed, but some fields have a “not applicable” option that can be used if the field does not apply to your organization.
- There is an optional “comments” field on each tab to add any comments you feel might be appropriate. Others have used these fields to note such items as: their annual audit is running late and they will update as soon as it arrives; their organization has multiple NAICS or FWA codes; the findings in an audit are applicable only to the financial aid area, etc. Note that these comments are visible to all.
- Profiles may be printed or saved as .pdf documents by using the Print:PDF function in the upper right hand corner of the screen.

Thank you all for your involvement with this Pilot! Please remember that this is still a Pilot system. We have tested the functionality thoroughly; however we anticipate that you will help uncover any remaining issues while we are still in Pilot phase through the end of June.

We hope that this web-based system is beneficial and easy to use! Please send any and all feedback on any aspects of the system at all to [fdpechelp@gmail.com](mailto:fdpechelp@gmail.com).

Lynette, Pamela and Jennifer (co-chairs)

And the FDP Expanded Clearinghouse Working Group and System Development Group