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# Emergency Food and Shelter National Board Program (EFSP) Website - User Guide for Local Recipient Organizations (LROs)

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## Welcome to the EFSP Website


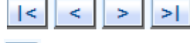

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This guide is designed to introduce you to using EFSP Website. The EFSP Website a streamlined process, for submission of documents to EFSP. This user guide will help the Contact Person of the Local Recipient Organization to submit Interim Report and 2nd Payment Request, Final Report, Variance Requests and Manage their personal information 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	 Check box  Back-forward navigation arrows  Radio buttons
2	Shading	<b>Note, Condition and Tip</b>
3	Bold font	Used to indicate Buttons, Tabs, Main-menu and Sub-menu, Check box, and Radio button.
4	Buttons	<b>Add:</b> Enables you to add information <b>Cancel:</b> Enables you to cancel the task and go back to the previous page <b>Close:</b> Enables you to close the Current screen <b>Edit:</b> Enables you to edit the data <b>Exit:</b> Enables you to exit the page/window <b>Home:</b> Enables you to go to Home page <b>Print:</b> Enables you to print a page/report <b>OK:</b> Enables you to save the data and close the window <b>Refresh:</b> Enables you to refresh the screen <b>Reset:</b> Enables you to reset the screen <b>Save:</b> Enables you to save the data. <b>Sign Out:</b> Enables you to log out from the application <b>View:</b> Enables you to view a report <b>Undo:</b> 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 <b>Save</b> button. Check the <b>LRO</b> radio button. Select from the <b>Phase</b> 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

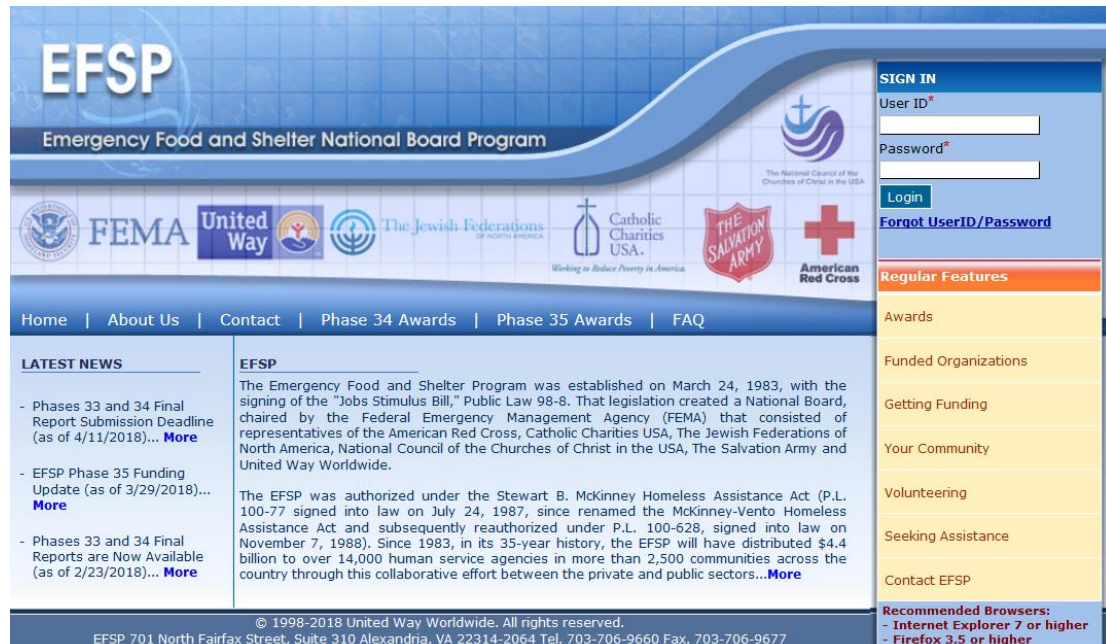
## C. Logging In

The Contact Person of the Local Recipient Organization (LRO) can login to EFSP Website. There can only be one contact person per LRO.

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

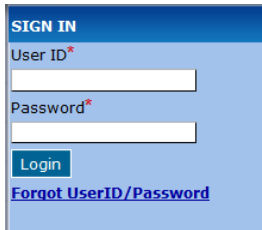


EFSP Website **Home** screen appears.



***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 nine-digits User ID in the **User ID** field.



**SIGN IN**

User ID\*

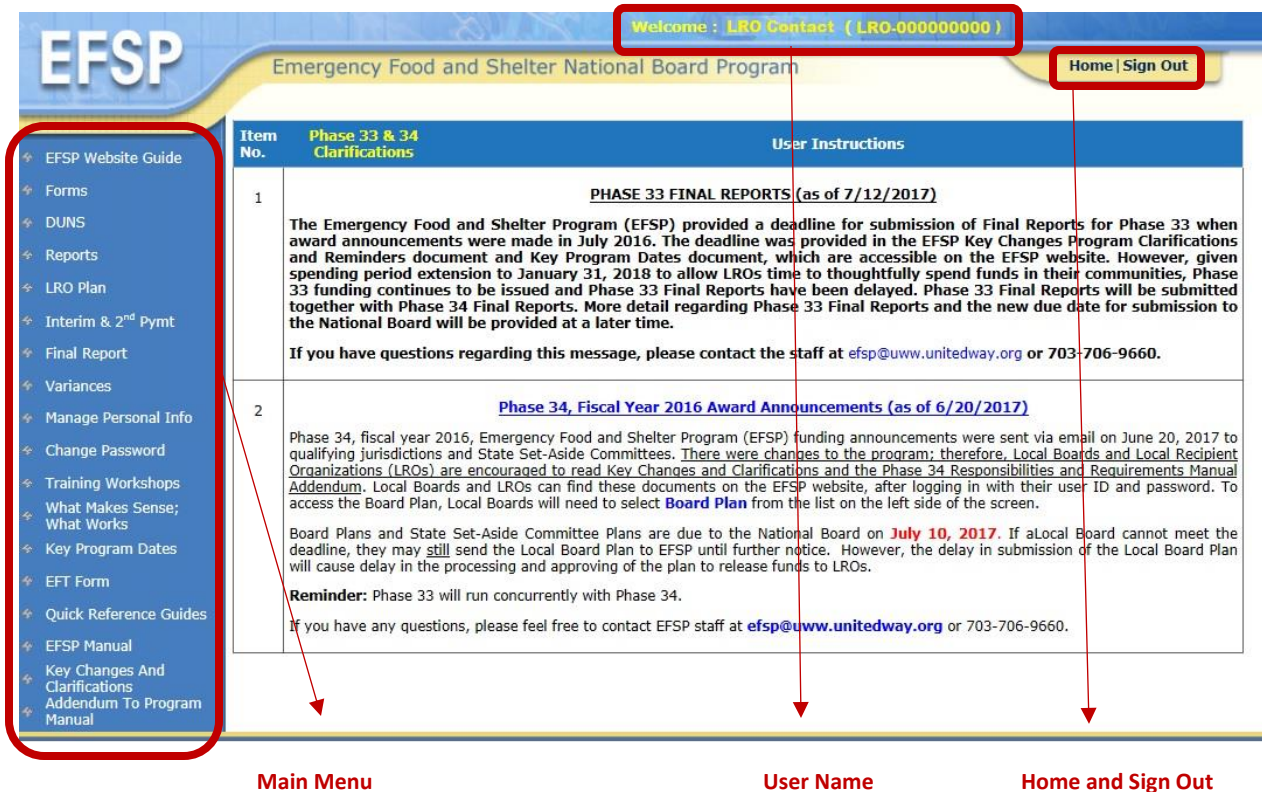
Password\*

Login

[Forgot UserID/Password](#)

**Note:** User ID of Contact Person is the LRO Number (e.g. 000601001).

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 : LRO Contact ( LRO-000000000 )

Home | Sign Out

Item No.	Phase 33 & 34 Clarifications	User Instructions
1	<b>PHASE 33 FINAL REPORTS (as of 7/12/2017)</b> 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. <b>If you have questions regarding this message, please contact the staff at <a href="mailto:efsp@unitedway.org">efsp@unitedway.org</a> or 703-706-9660.</b>	
2	<b>Phase 34, Fiscal Year 2016 Award Announcements (as of 6/20/2017)</b> Phase 34, fiscal year 2016, Emergency Food and Shelter Program (EFSP) funding announcements were sent via email on June 20, 2017 to qualifying jurisdictions and State Set-Aside Committees. <u>There were changes to the program; therefore, Local Boards and Local Recipient Organizations (LROs) are encouraged to read Key Changes and Clarifications and the Phase 34 Responsibilities and Requirements Manual Addendum.</u> Local Boards and LROs can find these documents on the EFSP website, after logging in with their user ID and password. To access the Board Plan, Local Boards will need to select <b>Board Plan</b> from the list on the left side of the screen. Board Plans and State Set-Aside Committee Plans are due to the National Board on <b>July 10, 2017</b> . If a Local Board cannot meet the deadline, they may still send the Local Board Plan to EFSP until further notice. 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. <b>Reminder:</b> Phase 33 will run concurrently with Phase 34. <b>If you have any questions, please feel free to contact EFSP staff at <a href="mailto:efsp@unitedway.org">efsp@unitedway.org</a> or 703-706-9660.</b>	

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.

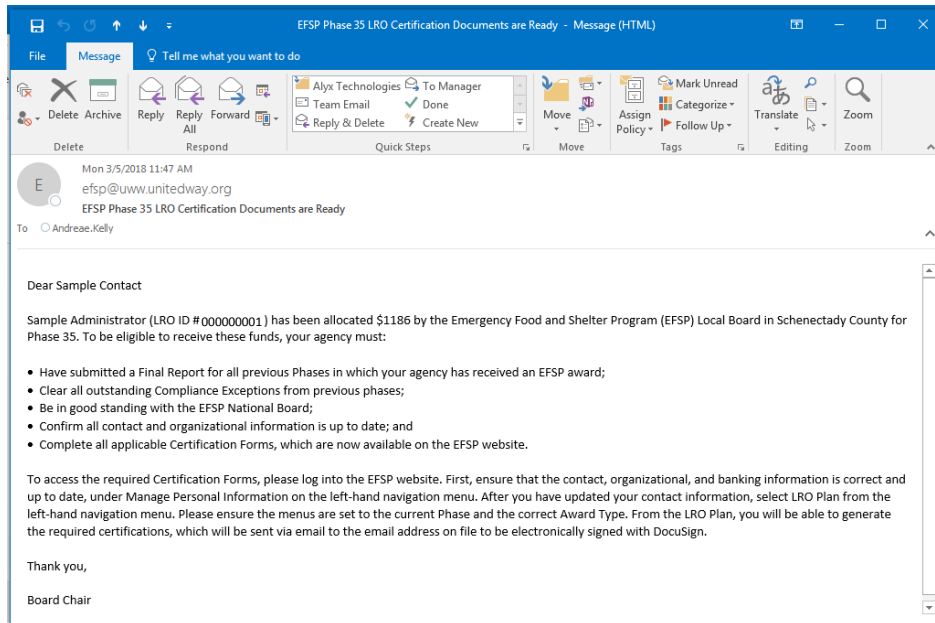
**Status Sheet:** Computer generated form to record compliance status for jurisdiction.

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

## Certification Forms

In the **LRO Plan** main-menu, the Contact Person of the Local Recipient Organization can view and generate all required certification forms for each award (whether funded directly, SSA, SSA Reallocation or National Board Reallocation). LRO must e-sign separate certifications for each award type.

After an LRO is awarded funds and the Local Board Plan has been submitted to EFSP and signed by all signers, the funded LROs will receive an email notification alerting them of the award and that the required certification forms are available on the website.



## A. Update LRO Contact Information

**Note:** The email address of LRO Contact designated as signers will be used to send documents for e-signing during the LRO Certification process. Please ensure the email address is correct.

1. Click on **Manage Personal Info** on the main-menu.  
**Edit Personal Information** screen appears with the LRO's personal information.

**Edit Personal information**

LB No.	000000	LB Name	Sample County, State					
LRO No.	001	LRO Name	Sample Shelter <input type="checkbox"/> Deleted					
Contact	LRO Contact		Salut.	<input type="text"/>	Affiliation	<input type="text"/>		
Address	Address		Target1			<input type="text"/>		
	<input type="text"/>		Target2			<input type="text"/>		
	<input type="text"/>		Target3			<input type="text"/>		
City-State-Zip	City	AL	<input type="text"/>	00000	HC Access	<input type="checkbox"/>		
EIN	<input type="text"/>		Fiscal Agent	<input type="checkbox"/>	Service Provider EIN	<input type="text"/>		
ABA No.	<input type="text"/>		DUNS No.	123456789		Account No.	<input type="text"/>	
Phone	555-555-5555		Ext	<input type="text"/>	Fax	<input type="text"/>	Password	*****
Email	kelly.andreae@uww.unitedway.org					Confirm Password	*****	
Web Site	<input type="text"/>							

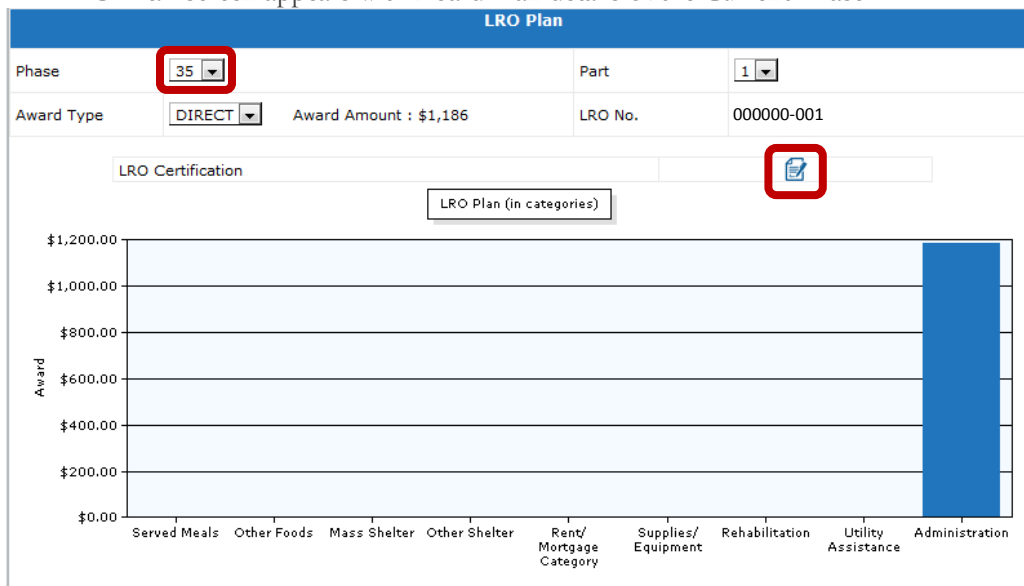
1. Click the **Edit** button.
1. Enter the LRO personal information.
1. Click the **Save** button.  
A pop-up message appears that says, "LRO Information updated successfully". Click **OK**.

## B. LRO Certification

**Condition:** LRO Certification can be submitted for the current Phase only. The Certification will become available after the Local Board allocates funds to a LRO and the Local Board Plan has been submitted to the National Board and e-signed by all Local Board signers.

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

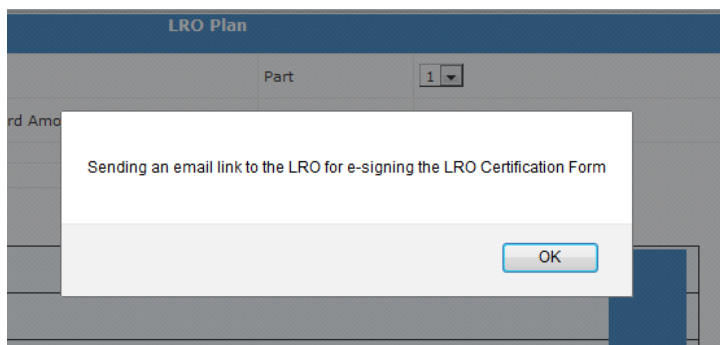
**LRO Plan** screen appears with Board Plan details of the Current Phase.



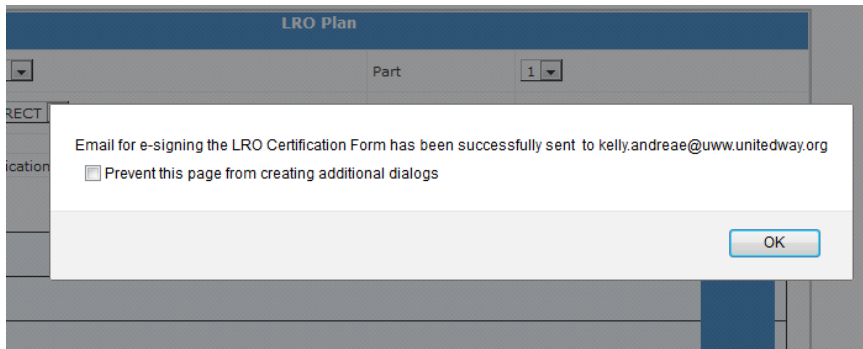
1. Select the Phase from the **Phase** drop-down box.

**Note:** LRO Plan be viewed for any Phase. The default Phase will always be the Current Phase.

1. Click the blue document icon next to **LRO Certification**.
1. A pop-up message appears that says “Sending an email link to the LRO for e-signing the LRO Certification Form.” Click **OK**.



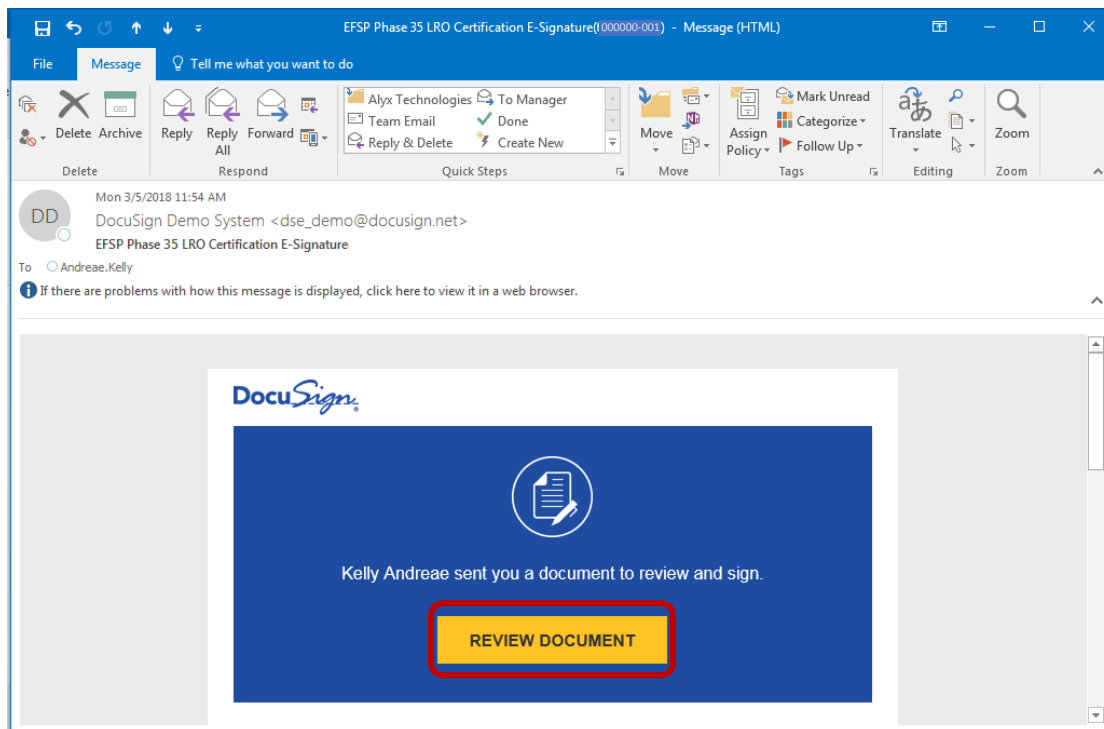
1. Another message appears verifying the email address the LRO Certification Form has been sent to.



An email is sent to the LRO Contact by DocuSign to electronically sign the LRO Certification.

### C. Electronic Signature for LRO Certification

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



1. 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

EFSP has sent you a document to review and sign. Request for eSignatures for your LRO Certifications. Your submission to the EFSP National Board is not complete and you will not be paid until this document has been signed.

Please review the documents below.

**CONTINUE**

OTHER ACTIONS ▾

#### 1. 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: 0E8B0922-25EA-4FEE-A891-45E46CE5DC46

**START**

### EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM PHASE 35 LOCAL RECIPIENT ORGANIZATION CERTIFICATION

*By signing this Local Recipient Organization (LRO) Certification Form, our agency certifies we have read and understand the Emergency Food and Shelter Program (EFSP) Phase 35 Responsibilities and Requirements Manual, including the Grant Agreement Articles, Financial Terms and Conditions, and Other Terms and Conditions as well as the Eligible and Ineligible Costs and Documentation sections and agree to comply with all program requirements. Our agency 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. All appropriate staff and volunteers have been informed of EFSP requirements. The Local Board has been provided and we have retained a copy of this form for our records.*

I certify that my public or private agency:

- Has the capability to provide emergency food and/or shelter services.
- Will use funds to supplement/extend existing resources and not to substitute or reimburse ongoing programs and services.
- Is nonprofit or an agency of government.
- Will not use EFSP funds as a cost-match for other Federal funds or programs.
- Has an accounting system, and will pay all vendors by an approved method of payment.
- Understands that cash payments (including petty cash) are not eligible under EFSP.
- Conducts an independent annual review if receiving \$50,000-\$99,999; an independent annual audit if receiving \$100,000 or more in EFSP funds, and follows OMB's Uniformed Guidance if receiving \$750,000 or more in Federal funding.
- Has not received an adverse or no opinion audit.
- Is not debarred or suspended from receiving Federal funds.
- Has provided a Federal Employer Identification Number (FEIN) to EFSP.
- Has provided a Data Universal Number System (DUNS) number issued by Dun & Bradstreet (D&B) and required associated information to EFSP.
- Practices non-discrimination (agencies with a religious affiliation, will not refuse service to an applicant based on religion, nor engage in religious proselytizing or religious counseling in any program receiving Federal funds).
- Will not charge a fee to clients for EFSP funded services.

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

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

35-003400-001CER.pdf 1 of 1

**SIGN**

PLEASE ENSURE THIS INFORMATION IS ACCURATE BEFORE SIGNING.

LRO ID #: 000000001  
FEIN #: 00-0000000  
DUNS#: 123456789  
LRO Legal Name: Sample Shelter  
Address: Address City ALABAMA 00000  
Phone #: 555-555-5555  
Fax #:   
Email:   
LRO Contact: LRO Contact  
Signature:  **Sign** **↓** Date: 3/13/2018

**FINISH**

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### 1. 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:  
Sample Contact  
C32FD2534FB745D...

DS  
SC

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**

1. **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\*

Sample Contact

Initials\*

SC

SELECT STYLE

DRAW

PREVIEW

DocuSigned by:

Sample Contact

C32FD2534FB745D...

DS

SC

Change Style

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

1. 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\*

Sample Contact

Initials\*

SC

SELECT STYLE

DRAW

PREVIEW

DocuSigned by:

Sample Contact

C32FD2534FB745D...

DS

SC

Change Style

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



1. 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 ▾

(55,000 or more) to the National Board.

- Will provide complete, accurate documentation of expenses to the Local Board, if requested, following my jurisdiction's selected end-of-program date.
- Has no known EFSP compliance exceptions in this or any other jurisdiction.
- Will not use EFSP funding for any lobbying activities and if receiving \$100,000 or more, will provide the "Certification Regarding Lobbying" and, if applicable, will complete Standard Form LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- Will not and will ensure its employees, volunteers or other individuals associated with the program will not engage in any trafficking of persons during the period this award is in effect.
- Will not and will ensure its employees, volunteers or other individuals associated with the program will not use EFSP funds to support access to classified national security information.

**PLEASE ENSURE THIS INFORMATION IS ACCURATE BEFORE SIGNING.**

LRO ID #: 000000001  
FEIN #: 00-0000000  
DUNS#: 123456789  
LRO Legal Name: Sample Shelter  
Address: Address City ALABAMA 00000  
Phone #: 555-555-5555  
Fax #:   
Email: kelly.andreae@uww.unitedway.org  
LRO Contact: LRO Contact  
Signature:  Date: 3/13/2018

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**FINISH**

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.

Log in to DocuSign

A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email  
kelly.andreae@uww.unitedway.org

**LOG IN** NO THANKS

A message appears stating that you have completed your document.

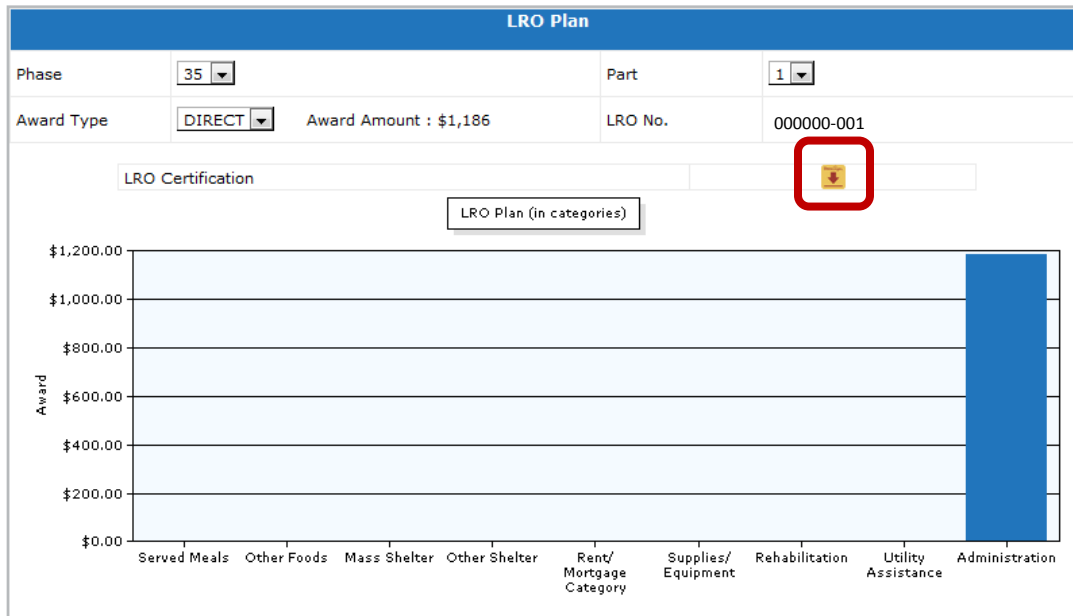
DocuSign

**You're done!**

Thanks for using DocuSign.

After all recipients finish signing, you will receive an email with a link to the document.

A copy of the signed LRO Certification will be emailed to you and the Local Board. You will be able to download a PDF copy or print a copy of the document on the EFSP website.

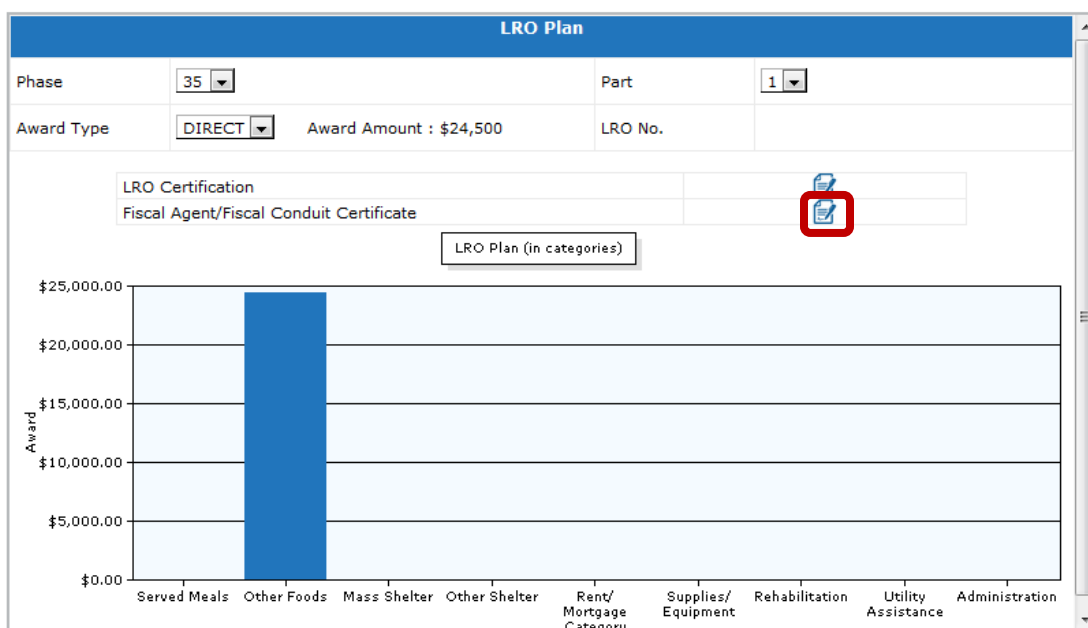


#### D. Fiscal Agent/Fiscal Conduit Form

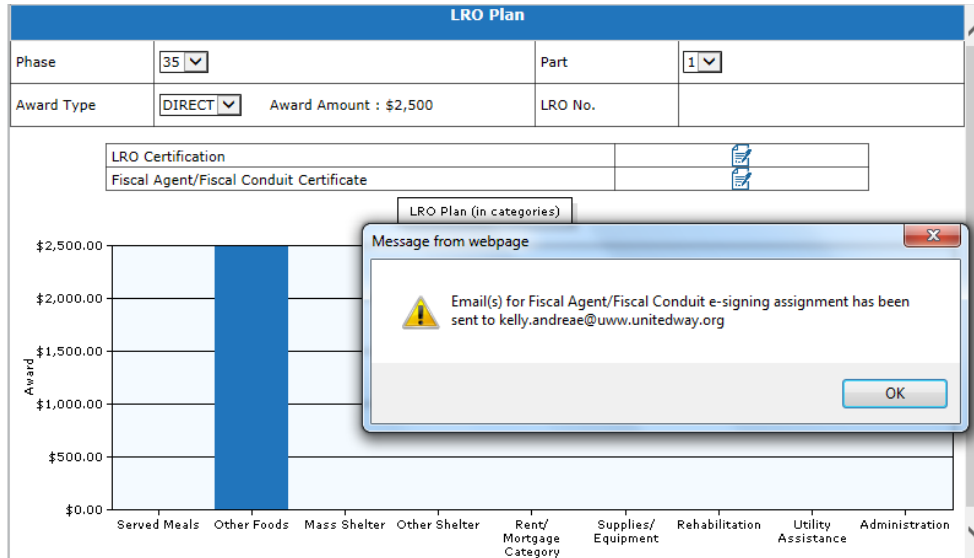
**Condition:** If the Local Board Identifies an LRO as a Fiscal Agent or Fiscal Conduit during the Local Board Plan submission, the Fiscal Agent/Fiscal Conduit Form will appear for the LRO to route the Fiscal Agent/Fiscal Conduit Certification to the sub-grantee(s).

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

**LRO Plan** screen appears with Board Plan details of the Current Phase.



1. Select the Phase from the **Phase** drop-down box.
1. Click the blue document icon next to **Fiscal Agent/Fiscal Conduit Certification**.
1. A pop-up message appears that says “Email(s) for Fiscal Agent/Conduit e-signing assignment have been sent to [Email address].” Click **OK**.



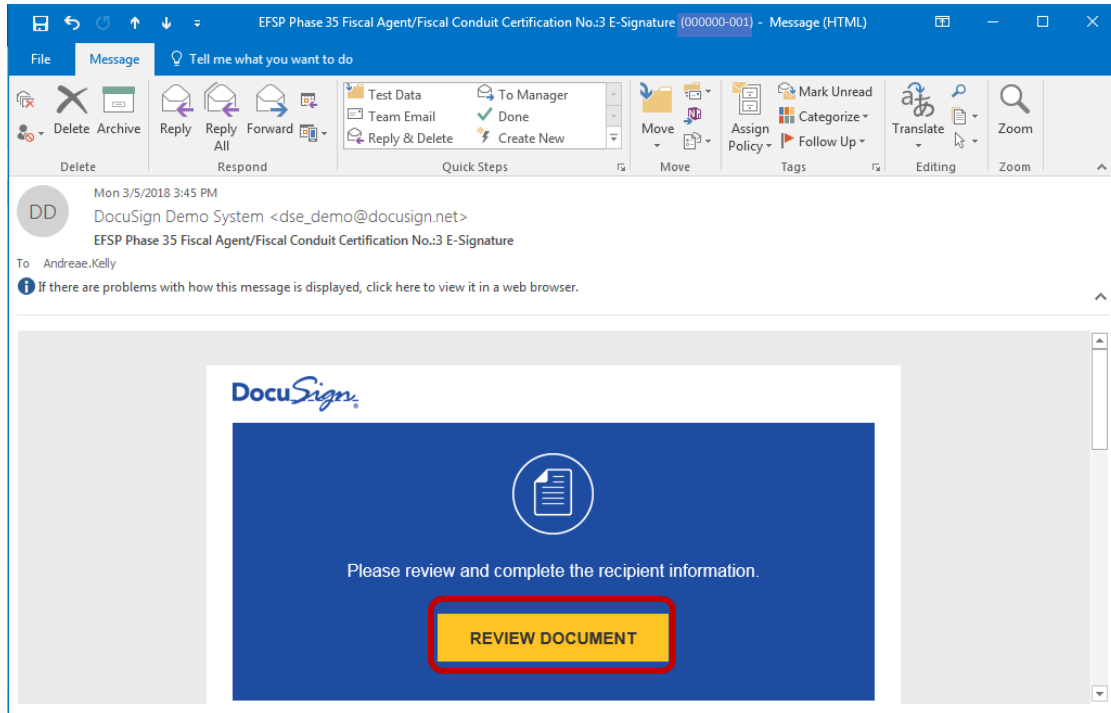
An email is sent to the LRO Contact by DocuSign to designate Fiscal Agent/Fiscal Conduit contacts.

## E. Assigning Fiscal Agent/Fiscal Conduit Forms

**Condition:** The LRO will receive the number of emails for the number of sub-grantee(s) identified by the Local Board during the Local Board Plan process. For example, if there are three sub-grantees, the LRO will receive three emails to assign the Fiscal Agent/Fiscal Conduit Relationship Certification Form to.

1. Review the DocuSign email.

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



1. Assign Document.

Enter the email address and contact name for the sub-recipient of the EFSP Funds. Click **Complete and Send**.

DocuSign Envelope ID: 6B21F3D4-864D-41B0-BB29-0D17302A7D5F

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www.docuSign.com

**You have been asked to review and add recipient information.**  
Please enter the email address and name for the associated role and select 'Complete and Send'.

Role	Email	Name
	<input type="text"/>	<input type="text"/>

[Edit Private Message](#)

**COMPLETE AND SEND** [Show Document](#)

**PROGRAM  
ATIONSHIP**

it Agency at the beginning

certifies we have read and  
ents Manual, including the  
well as the Eligible and  
agency understands that all  
pliance with applicable  
rogram including those not  
requirements. The Local  
ained a copy of this form for  
their records.

As a **recipient agency** (through the Fiscal Agent/Fiscal Conduit noted below) of Emergency Food and Shelter National Board Program (EFSP) funds made available for Phase 33 and as the duly authorized representative of

\_\_\_\_\_  
(NAME OF AGENCY/SUB-RECIPIENT)

I certify that my public or private agency:

- **Has a Fiscal Agent/Fiscal Conduit approved by the Local Board:**
- Is not debarred or suspended from receiving Federal funds.
- Has the capability to provide emergency food and/or shelter services.
- Will use funds to supplement and extend existing resources and not to substitute or reimburse ongoing programs and services.
- Is nonprofit or an agency of government.

**OTHER ACTIONS ▾**

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1. A notification appears stating the addressing is complete. Click **Done**.

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**EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM  
PHASE 35 FISCAL AGENT/FISCAL CONDUIT AGENCY RELATIONSHIP**

This certification is  
of the funding cycle.

By signing this Form  
understand the Emergency  
Grant Agreement and  
Ineligible Costs and  
parties will be held  
requirements of all  
specifically stated in  
Board, Fiscal Agent,  
their records.

**ADDRESSING COMPLETE**

You have completed assigning your recipients.

**STAY AND REVIEW** **DONE**

Agency at the beginning

agency certifies we have read and  
requirements Manual, including the  
as well as the Eligible and  
Our agency understands that all  
all compliance with applicable  
its program including those not  
EFSP requirements. The Local  
retained a copy of this form for

As a **recipient agency** (through the Fiscal Agent/Fiscal Conduit noted below) of Emergency Food and Shelter National Board Program (EFSP) funds made available for Phase 33 and as the duly authorized representative of

\_\_\_\_\_  
(NAME OF AGENCY/SUB-RECIPIENT)

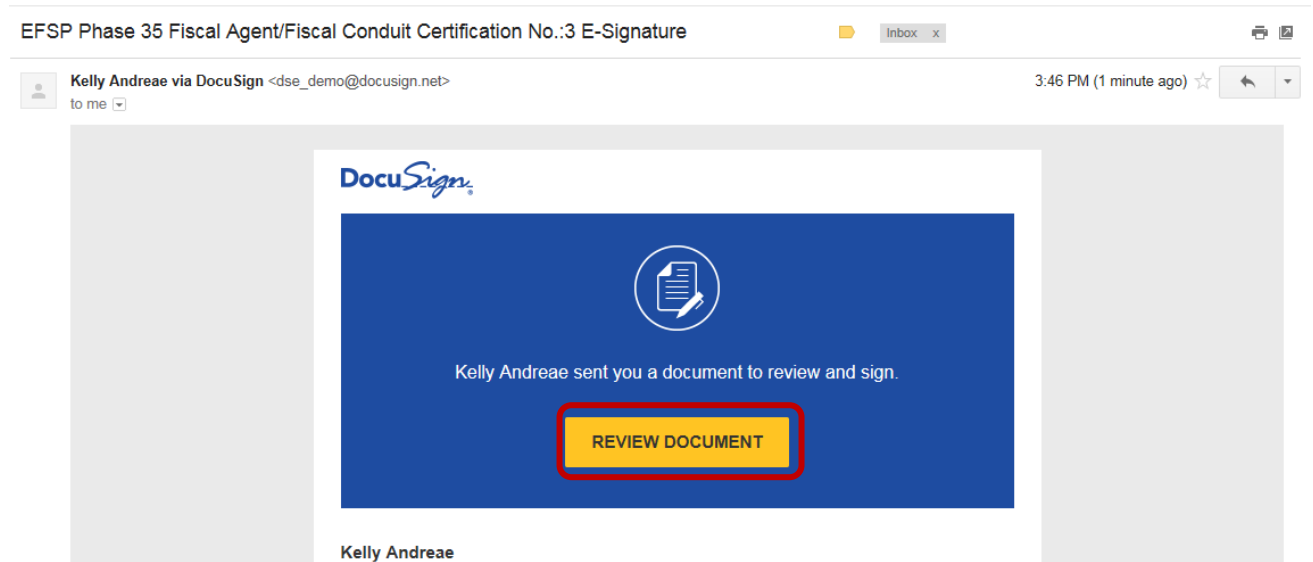
I certify that my public or private agency:

- **Has a Fiscal Agent/Fiscal Conduit approved by the Local Board:**
- Is not debarred or suspended from receiving Federal funds.
- Has the capability to provide emergency food and/or shelter services.
- Will use funds to supplement and extend existing resources and not to substitute or reimburse ongoing programs and services.
- Is nonprofit or an agency of government.

**OTHER ACTIONS ▾**

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1. The sub-grantee receives the email from DocuSign and they review the DocuSign email. Open the email and review the message from the sender. Click **Review Document** to begin the signing process.



1. Agree to sign electronically.  
The sub-grantee reviews the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **Continue**.

**Please Review & Act on These Documents**

 **Sample Contact**  
Sub-Grantee Name

This form must be signed using DocuSign by the sub recipient of EFSP funds. Singing this form will verify the relationship between the Fiscal Conduit/Fiscal Agent and the sub recipient and verify the sub recipient is aware of all EFSP program  
[View More](#)

Please review the documents below.

**CONTINUE** OTHER ACTIONS ▾

## 1. The sub-grantee starts 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.

**START** **FINISH** **OTHER ACTIONS**

DocuSign Envelope ID: 0262A817-3F68-4AD1-ADA2-58B1903E0158

### EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM PHASE 35 FISCAL AGENT/FISCAL CONDUIT AGENCY RELATIONSHIP

*This certification must be signed by each agency receiving funds through a Fiscal Agent/Fiscal Conduit Agency at the beginning of the funding cycle.*

*By signing this Fiscal Agent/Fiscal Conduit Agency Relationship Certification Form, our agency certifies we have read and understand the Emergency Food and Shelter Program (EFSP) Phase 35 Responsibilities and Requirements Manual, including the Grant Agreement Articles, Financial Terms and Conditions, and Other Terms and Conditions as well as the Eligible and Ineligible Costs and Documentation sections and agree to comply with all program requirements. Our agency 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. All appropriate staff and volunteers have been informed of EFSP requirements. The Local Board, Fiscal Agent/Fiscal Conduit and the agency(ies) benefitting through the relationship have retained a copy of this form for their records.*

As a **recipient agency** (through the Fiscal Agent/Fiscal Conduit noted below) of Emergency Food and Shelter National Board Program (EFSP) funds made available for Phase 33 and as the duly authorized representative of

(NAME OF AGENCY/SUB-RECIPIENT)

I certify that my public or private agency:

- **Has a Fiscal Agent/Fiscal Conduit approved by the Local Board:** Sample Food Bank (003400-002)
- Is not debarred or suspended from receiving Federal funds.
- Has the capability to provide emergency food and/or shelter services.
- Will use funds to supplement and extend existing resources and not to substitute or reimburse ongoing programs and services.
- Is nonprofit or an agency of government.
- Will not use EFSP funds as a cost match for other Federal funds or programs.
- Practices non-discrimination (agencies with a religious affiliation, will not refuse service to an applicant based on religion, nor engage in religious proselytizing or religious counseling in any program receiving Federal funds).

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1. Enter the sub-grantee information in all required fields.

Enter text

FINISH OTHER ACTIONS

**PHASE 35 FISCAL AGENT/FISCAL CONDUIT AGENCY RELATIONSHIP**

*This certification must be signed by each agency receiving funds through a Fiscal Agent/Fiscal Conduit Agency at the beginning of the funding cycle.*

*By signing this Fiscal Agent/Fiscal Conduit Agency Relationship Certification Form, our agency certifies we have read and understand the Emergency Food and Shelter Program (EFSP) Phase 35 Responsibilities and Requirements Manual, including the Grant Agreement Articles, Financial Terms and Conditions, and Other Terms and Conditions as well as the Eligible and Ineligible Costs and Documentation sections and agree to comply with all program requirements. Our agency 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. All appropriate staff and volunteers have been informed of EFSP requirements. The Local Board, Fiscal Agent/Fiscal Conduit and the agency(ies) benefitting through the relationship have retained a copy of this form for their records.*

As a **recipient agency** (through the Fiscal Agent/Fiscal Conduit noted below) of Emergency Food and Shelter National Board Program (EFSP) funds made available for Phase 33 and as the duly **Required** representative of

(NAME OF AGENCY/SUB-RECIPIENT)

I certify that my public or private agency:

- Has a **Fiscal Agent/Fiscal Conduit approved by the Local Board:** Sample Food Bank
- Is not debarred or suspended from receiving Federal funds.
- Has the capability to provide emergency food and/or shelter services.
- Will use funds to supplement and extend existing resources and not to substitute or reimburse ongoing programs and services.
- Is nonprofit or an agency of government.
- Will not use EFSP funds as a cost match for other Federal funds or programs.
- Practices non-discrimination (agencies with a religious affiliation, will not refuse service to an applicant based on religion, not engage in religious proselytizing or religious counseling in any program receiving Federal funds).
- Has provided a Federal Employer Identification Number (FEIN) to EFSP.
- Has provided a Data Universal Number System (DUNS) number issued by Dun & Bradstreet (D&B) and required associated information to EFSP.
- Will not charge a fee to clients for EFSP funded services.
- Has a voluntary board if private, not-for-profit.
- Understands that cash payments (including petty cash) are not eligible under EFSP.**

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Enter text

FINISH OTHER ACTIONS

- Has a voluntary board if private, not-for-profit.
- Understands that cash payments (including petty cash) are not eligible under EFSP.**
- Will provide all required information to the Fiscal Agent/Fiscal Conduit.
- Will expend monies only on eligible costs and keep complete, accurate documentation (copies of canceled LRO checks -- front and back, other proof of payment, invoices, receipts, etc.) on all expenditures for a minimum of three years after end-of-program date, and for compliance issues until resolved.
- Will provide complete, accurate documentation to the Fiscal Agent/Fiscal Conduit Agency for payment to the vendor.
- Will not use EFSP funding for any lobbying activities and if receiving \$100,000 or more, will provide the "Certification Regarding Lobbying" and, if applicable, will complete Standard Form LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.
- Has certified that our employees, volunteers, or other individuals associated with the program understand they will not engage in any trafficking of persons during the period this award is in effect.
- Has certified that our employees, volunteers, or other individuals associated with the program understand they will not use EFSP funds to support access to classified national security information during the period this award is in effect.
- Has no known EFSP compliance exceptions in this or any other jurisdiction.
- Will spend all funds and close-out the program by the jurisdiction's selected end-of-program date, and return any unused funds (\$5.00 or more) to the National Board.

**This form must be completed in its entirety. Please do not alter this form; any questions regarding the form should be directed to EFSP staff.**

**Required**

Agency Name (Sub-recipient): Local Food Pantry

FEIN# (Sub-recipient): DUNS # (Sub-recipient):

Street Address/City/State/Zip:

Phone #: Fax #: Email:

Contact Name:

Signature: Date: 3/5/2018

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1. After all information has been entered, click the **Sign** tag. You are asked to Adopt Your Signature.

Enter text

FINISH OTHER ACTIONS

35-625800-003-FIS-#3 1 of 1

FINISH

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1. **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\*

Sample Contact SC

SELECT STYLE DRAW

PREVIEW Change Style

DocuSigned by:  
Sample Contact  
C32FD2534FB745D...

DS  
SC

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

1. **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\*

Sample Contact

Initials\*

SC

SELECT STYLE

DRAW

PREVIEW

DocuSigned by:

Sample Contact

C32FD2534FB745D...

DS

SC

Change Style

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

1. 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\*

Sample Contact

Initials\*

SC

SELECT STYLE

DRAW

PREVIEW

DocuSigned by:

Sample Contact

C32FD2534FB745D...

DS

SC

Change Style

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

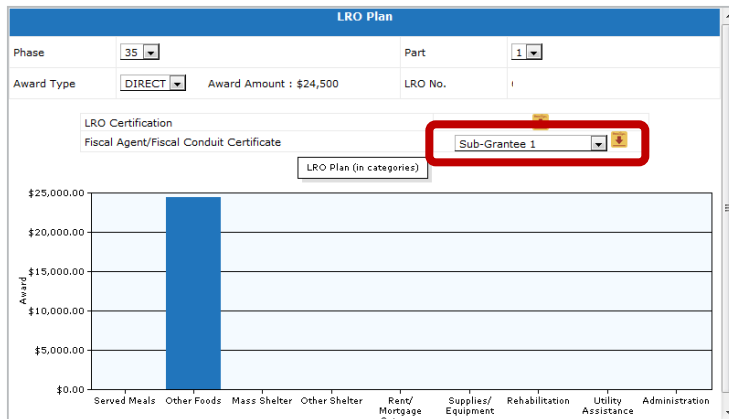
# 1. Confirm signing.

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.

A copy of the signed Fiscal Agent/Fiscal Conduit Certification will be emailed to the umbrella LRO, the sub-grantee, and Local Board. The LRO will be able to download a PDF copy or print a copy of the document on the EFSP website. Fiscal Conduits can select the correct agency form by selecting the email address the form was sent to from the drop-down menu.



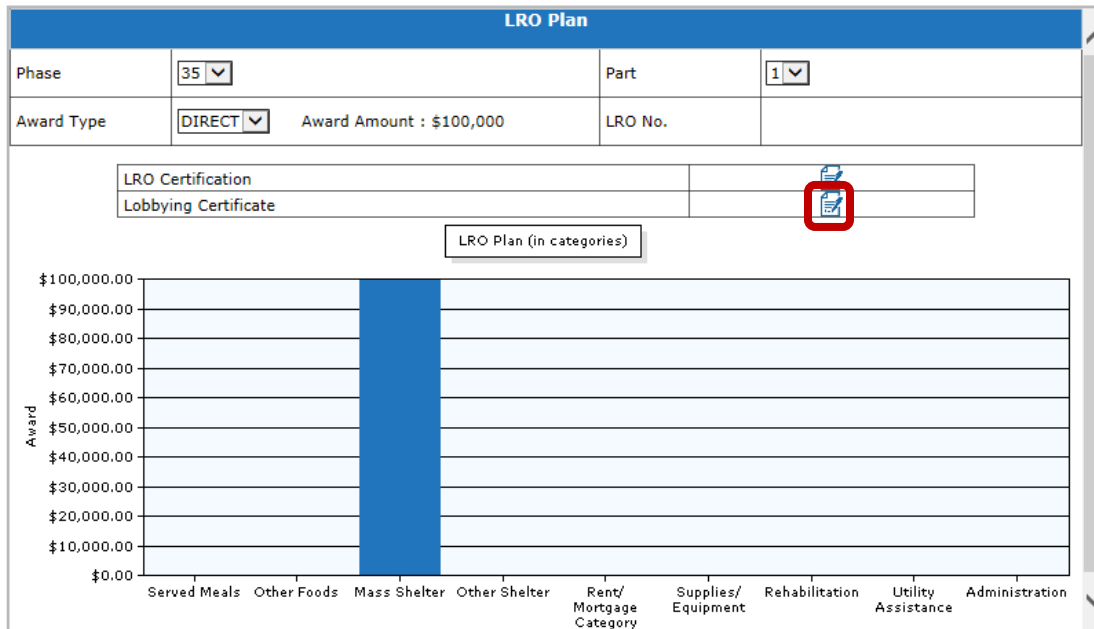
If too many Fiscal Conduit envelopes are created, please contact EFSP to have the extra envelopes voided.

## F. Lobbying Certification

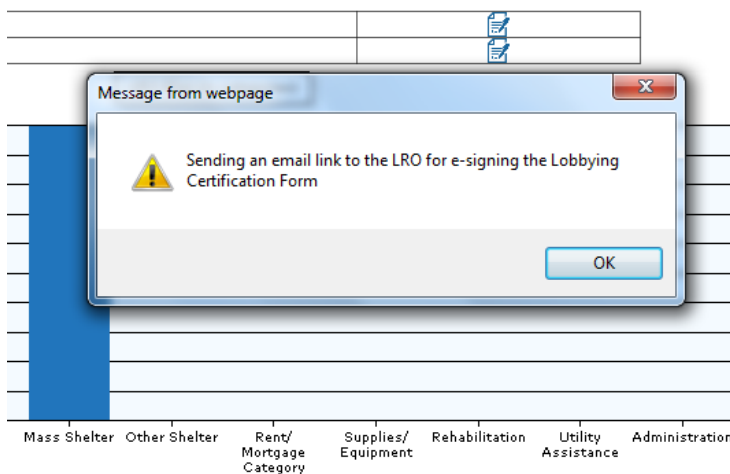
**Condition:** The Lobbying Certification will only be available to sign, if your LRO is allocated \$100,000 or more.

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

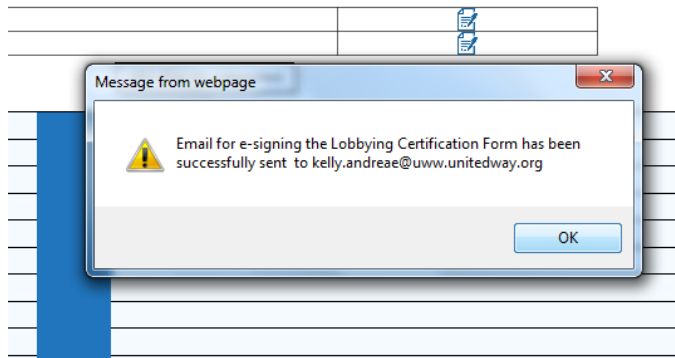
**LRO Plan** screen appears with Board Plan details of the Current Phase.



1. Select the Phase from the **Phase** drop-down box.
1. Click the blue icon next to **Lobbying Certification**.
1. A pop-up message appears that says "Sending an email link to the LRO for e-signing the Lobbying Certification Form." Click **OK**.



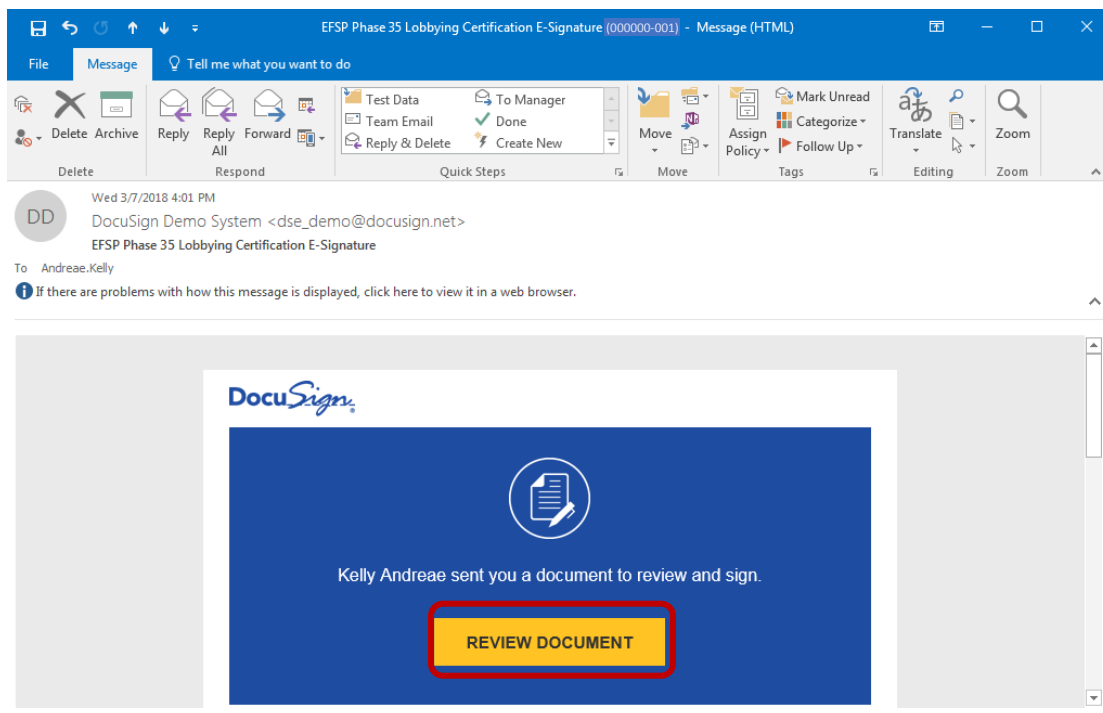
1. Another message appears verifying the email address the LRO Certification Form has been sent to. **Click OK.**



An email is sent to the LRO Contact by DocuSign to electronically sign the Lobbying Certification.

## G. Electronic Signature for Lobbying Certification

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



1. 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 by any LRO receiving \$100,000 or more in EFSP funding. Once this form and any other required forms have been signed by the LRO, the LRO will be eligible to receive their first payment. Please note: All [View More](#)

Please review the documents below.

**CONTINUE**

OTHER ACTIONS ▾

1. **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: 5F37A628-9DC3-4AF5-85D0-2BA4079020DC

**START**

**EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM  
PHASE 35 CERTIFICATION REGARDING LOBBYING**

*Certification for Contracts, Grants, Loans and Cooperative Agreements*

The undersigned certifies, to the best of his or her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid by or on the behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, contribution, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

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

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

Q Q ⏏ ⏏ ⏏ ⏏

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Title 31 U.S.C. §1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

This form must be completed in its entirety. Please do not alter this form; any questions regarding the form should be directed to EFSP staff.

Sample LRO 000000-001  
LRO Name LRO ID Number (9 digits)

**Required - Sign Here**  
Sign  
Representative Signature 3/7/2018  
Date (month/day/year)

NOTE: Standard Form LLL and instructions are available at [www.grants.gov](http://www.grants.gov)

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1. **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\***

Sample Contact SC

**SELECT STYLE** **DRAW**

**PREVIEW** Change Style

DocuSigned by:  
*Sample Contact*  
C32FD2534FB745D... DS  
SC

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**



1. **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\*

Sample Contact

Initials\*

SC

SELECT STYLE

DRAW

PREVIEW

DocuSigned by:

Sample Contact

C32FD2534FB745D...

DS

SC

Change Style

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

1. 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\*

Sample Contact

Initials\*

SC

SELECT STYLE

DRAW

PREVIEW

DocuSigned by:

Sample Contact

C32FD2534FB745D...

DS

SC

Change Style

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

1. 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 ▾

Search, Download, Print, Share, Help icons

This form must be completed in its entirety. Please do not alter this form; any questions regarding the form should be directed to EFSP staff.

Sample LRO \_\_\_\_\_ 000000-001 \_\_\_\_\_  
LRO Name LRO ID Number (9 digits)

Sample Contact \_\_\_\_\_  
Representative Name

DocuSigned by:  
Sample Contact \_\_\_\_\_  
Representative Signature Date (month/day/year) 3/7/2018

NOTE: Standard Form LLL and instructions are available at [www.grants.gov](http://www.grants.gov)

35-000601-030-LOB 1 of 1

**FINISH**

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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.

Log in to DocuSign

A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email  
kelly.andrae@uww.unitedway.org

**LOG IN** NO THANKS

A message appears stating that you have completed your document.

DocuSign

**You're done!**

Thanks for using DocuSign.

After all recipients finish signing, you will receive an email with a link to the document.

A copy of the signed Lobbying Certification will be emailed to you and the Local Board. You will be able to download a PDF copy or print a copy of the document on the EFSP website.

LRO Plan			
Phase	35	Part	1
Award Type	DIRECT	Award Amount : \$100,000	LRO No.
LRO Certification			
Lobbying Certificate			
LRO Plan (in categories)			
Award	\$100,000.00		
	\$90,000.00		
	\$80,000.00		
	\$70,000.00		
	\$60,000.00		
	\$50,000.00		
	\$40,000.00		
	\$30,000.00		
	\$20,000.00		
	\$10,000.00		
\$0.00			
	Served Meals	Other Foods	Mass Shelter
		Other Shelter	Rent/ Mortgage Category
		Supplies/ Equipment	Rehabilitation
		Utility Assistance	Administration

## Interim Report and Second Payment

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.

**Condition:** 1st Payment is made to the LRO.

### A. Submit Interim Report

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

The screenshot shows the EFSP (Emergency Food and Shelter National Board Program) website. The left-hand main-menu is visible, with the 'Interim & 2nd Pymt' option highlighted with a red box. The main content area displays 'User Instructions' for 'Phase 33 & 34 Clarifications'. It includes two items: 'PHASE 33 FINAL REPORTS (as of 7/12/2017)' and 'Phase 34, Fiscal Year 2016 Award Announcements (as of 6/20/2017)'. The page also features a welcome message for LRO Contact 008 and a 'Home | Sign Out' link.

Interim Report and Second Payment Request screen appears.

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

Interim Report and Second Payment Request					
Phase	<input type="text" value="34"/>	LB No.	000000	LRO No.	008
Awarded Amount	\$10,000.00	Received Amount	\$5,000.00	Payment Request	\$5,000.00
Interim Report Status	<a href="#">Click here</a> to submit Interim Report and Second Payment Request to LB.				

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

3. Click on the Click here link.

Interim Report and Second Payment Request					
Phase	34	LB No.	000000	LRO No.	008
Awarded Amount	\$10,000.00	Received Amount	\$5,000.00	Payment Request	\$5,000.00
Interim Report Status	<a href="#">Click here to submit Interim Report and Second Payment Request to LB.</a>				

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

LRO Interim Report and Second Payment Request for Phase - 34					
Phase	34	LB Number	000000	LRO No.	008
Awarded Amount	10,000	Paid Amount	5,000.00	2 <sup>nd</sup> Payment Request	5,000.00
<b>Categories</b>					
(A)	Served Meals	0.00			
(B)	Other Foods	0.00 x			
(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 Fund	0.00			
(K)	Total Expended	0.00			
<a href="#">Save without Submit</a> <a href="#">Submit to LB and Esign</a> <a href="#">Close</a>					

4. Enter the amount in the fields provided against the **Categories**.

LRO Interim Report and Second Payment Request for Phase - 34					
Phase	34	LB Number	000000	LRO No.	008
Awarded Amount	10,000	Paid Amount	5,000.00	2 <sup>nd</sup> Payment Request	5,000.00
<b>Categories</b>					
(A)	Served Meals	0.00			
(B)	Other Foods	5,000.00 x			
(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 Fund	0.00			
(K)	Total Expended	5,000.00			
<a href="#">Save without Submit</a> <a href="#">Submit to LB and Esign</a> <a href="#">Close</a>					

- Click the **Submit to LB and Esign** button.

LRO Interim Report and Second Payment Request for Phase - 34					
Phase	34	LB Number	000000	LRO No.	008
Awarded Amount	10,000	Paid Amount	5,000.00	2 <sup>nd</sup> Payment Request	5,000.00
<b>Categories</b>					
(A)	Served Meals	0.00			
(B)	Other Foods	5,000.00 x			
(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 Fund	0.00			
(K)	Total Expended	5,000.00			
<div> <input type="button" value="Save without Submit"/> <input type="button" value="Submit to LB and Esign"/> <input type="button" value="Close"/> </div>					

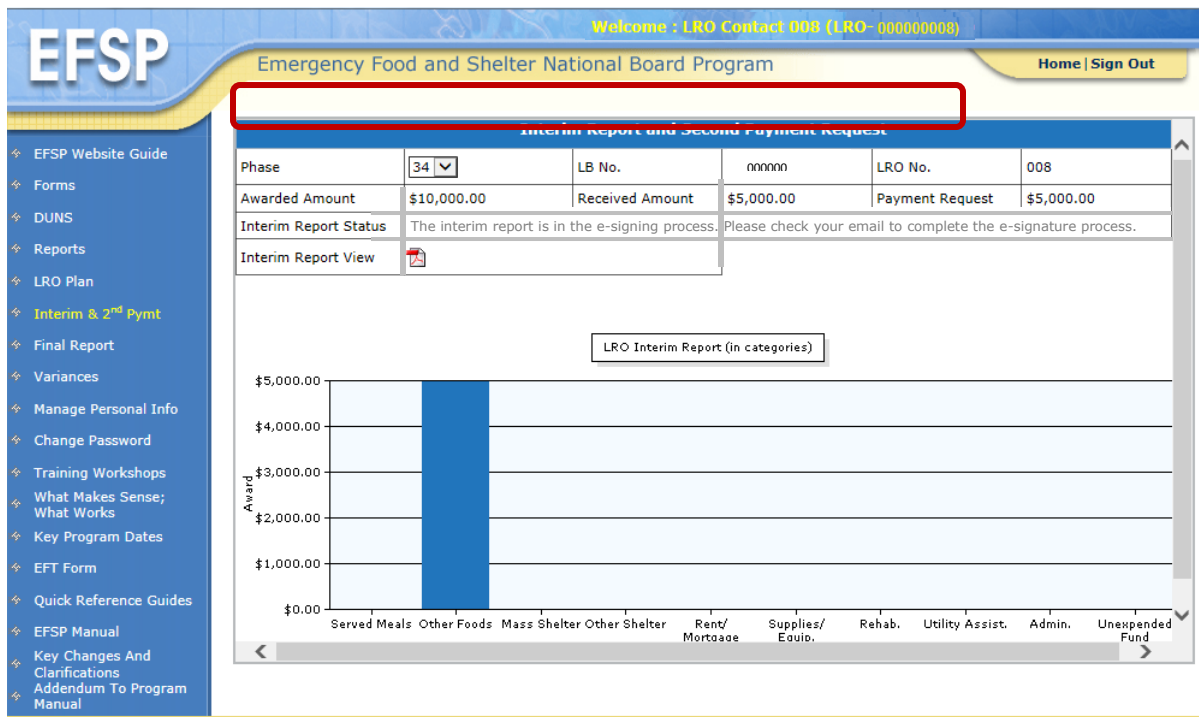
**Note:** The amount reported (line K) must equal the amount paid to date. If you have not spent all the received funds, please enter the amount of unexpended funds on line J.

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.

- A pop-up message appears that says, "Are you sure to submit Interim Report to LB".
- Click the **OK** button.
- A pop-up message appears that says, "LRO Interim Report and Second Payment Request has been submitted to LB successfully."
- Click the **OK** button.
- A pop-up message appears that says, "Sending an email link to the LRO for e-signing the 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.

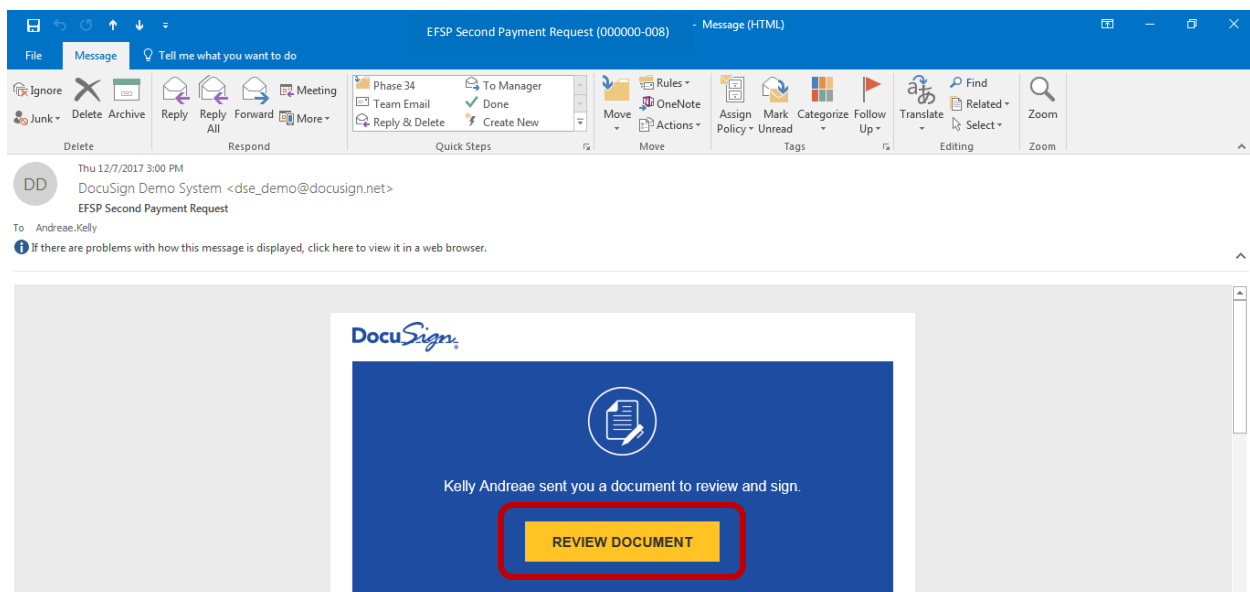
**Interim Report and Second Payment Request** screen appears with the LRO Interim Report (in categories) chart. Interim Report Status has changed to “The interim report is in the e-signing process. Please check your email to complete the e-signature process.”



## B. 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.

Please review the documents below.

**FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: D118D0BE-8C4F-4180-B7D1-059DC2C92886

**START**

34-0000-00-008

**Phase 34 Interim LRO Report and Second Payment Request**

0000-00 Sample County, State  
**LRO ID: 000000-008**  
LRO Contact  
LRO Organization Name  
LRO Address  
City, State Zip

This form must be completed and signed when your LRO is requesting the second portion of its award. Your LRO must be enrolled for EFT in the above jurisdiction before second payments can be made. Requests for second payments should be submitted to the Local Board before your LRO's first payment is exhausted.

**Report on the amount spent from your LRO's first payment.**

	<u>Expenditures</u>
A. Served meals	\$0.00
B. Other food	\$5,000.00
C. Mass shelter	\$0.00
D. Other shelter	\$0.00
E. Supplies/equipment	\$0.00
F. Building code/accessibility repairs	\$0.00
G. Rent/mortgage	\$0.00
H. Utilities	\$0.00
I. Administration	\$0.00
J. Unexpended funds to date	\$0.00

DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2017 DocuSign Inc. | 1/2R



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


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

Report on the amount spent from your LRO's first payment.

	Expenditures
A. Served meals	\$0.00
B. Other food	\$5,000.00
C. Mass shelter	\$0.00
D. Other shelter	\$0.00
E. Supplies/equipment	\$0.00
F. Building code/accessibility repairs	\$0.00
G. Rent/mortgage	\$0.00
H. Utilities	\$0.00
I. Administration	\$0.00
J. Unexpended funds to date	\$0.00
K. Total of funds received to date (A+B+C+D+E+F+G+H+I+J)	

**Line K must equal the LRO's first payment**

12/7/2017  
Date

**Required - Sign Here**  
  
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.

Date \_\_\_\_\_ LB Chair \_\_\_\_\_

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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\***

LRO Contact 001 LRO

**SELECT STYLE** **DRAW**

**PREVIEW** Change Style

DocuSigned by:  
  
C32FD2534FB745D...

DS  


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:
  - 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\***

LRO Contact 001

**Initials\***

LRO

**SELECT STYLE**

**DRAW**

**PREVIEW**

Change Style

DocuSigned by:  
LRO Contact 001  
C32FD2534FB745D...

DS  
LRO

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\***

LRO Contact 001

**Initials\***

LRO

**SELECT STYLE**

**DRAW**

**PREVIEW**

Change Style

DocuSigned by:  
LRO Contact 001  
C32FD2534FB745D...

DS  
LRO

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**.

Done! Select Finish to send the completed document.

**FINISH** OTHER ACTIONS ▾

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

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.

Log in to DocuSign

A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email  
kelly.andraee@uww.unitedway.org

**LOG IN** NO THANKS

A message appears stating that you have completed your document. Your Interim Report and Second Payment Request will now be sent to the Local Board Contact to electronically sign.

DocuSign

**You're done!**

Thanks for using DocuSign.

After all recipients finish signing, you will receive an email with a link to the document.

**30 DAY FREE TRIAL**

**Try DocuSign for free**  
Sign and send all your documents using DocuSign with a free, no-obligation 30-day trial.


**SIGN UP**

First, you will be notified after the Local Board Contact views the Interim Report and Second Payment Request. After the Local Board Contact approves and signs the Interim Report and Second Payment Request, you can now download a PDF copy or print a copy of the document on the EFSP website.

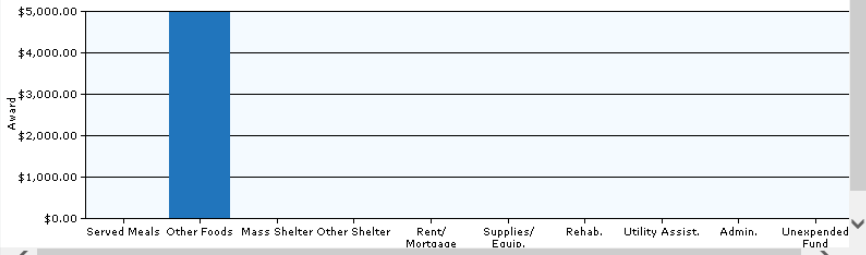
- Click on pdf icon to view/download the signed LRO Interim Report.

**EFSP** Welcome : LRO Contact 008 (LRO-085800008) Emergency Food and Shelter National Board Program Home | Sign Out

**Interim Report and Second Payment Request**

Phase	34	LB No.	085800	LRO No.	008
Awarded Amount	\$10,000.00	Received Amount	\$5,000.00	Payment Request	\$5,000.00
<b>Interim Report Status</b> Interim Report and Second Payment Request has been approved by EFSP.					
<b>Interim Report View</b> 					

**LRO Interim Report (in categories)**




**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:  
  
 039F02504F07450  
 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**

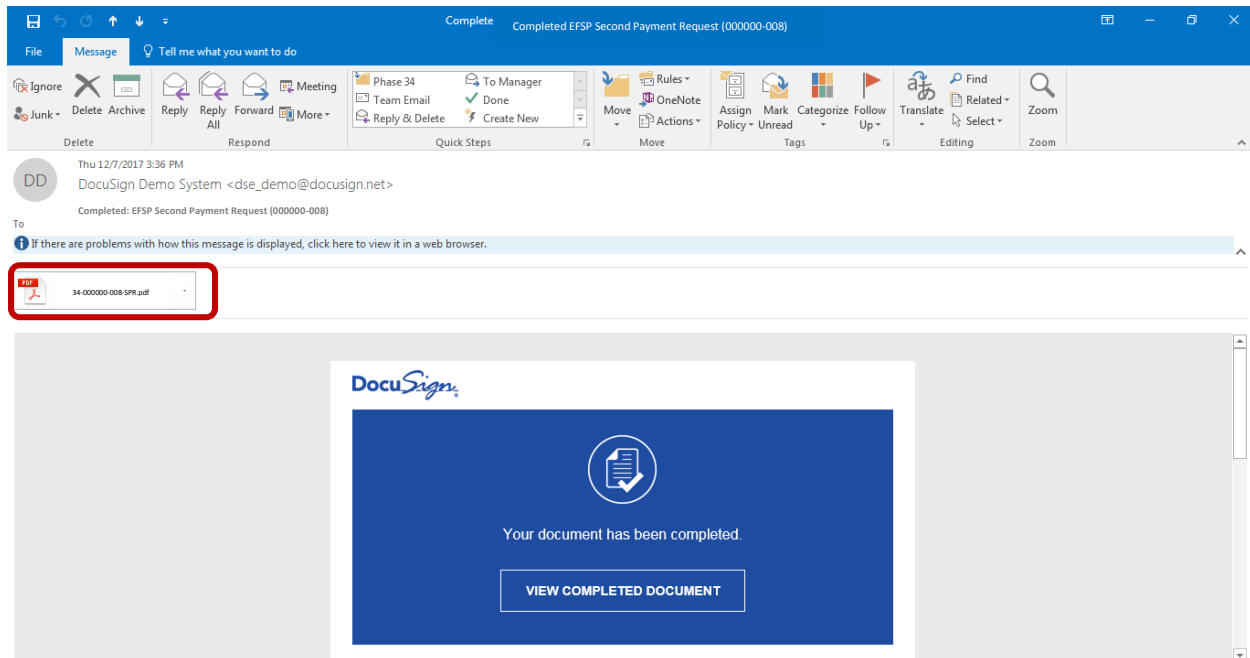
The above listed **LRO** is in need of the second portion of its award. By signing this report, the Local Board is satisfied that the **LRO** has expended funds in a timely manner and within the stated eligible costs of this program.

12/7/2017  
 Date

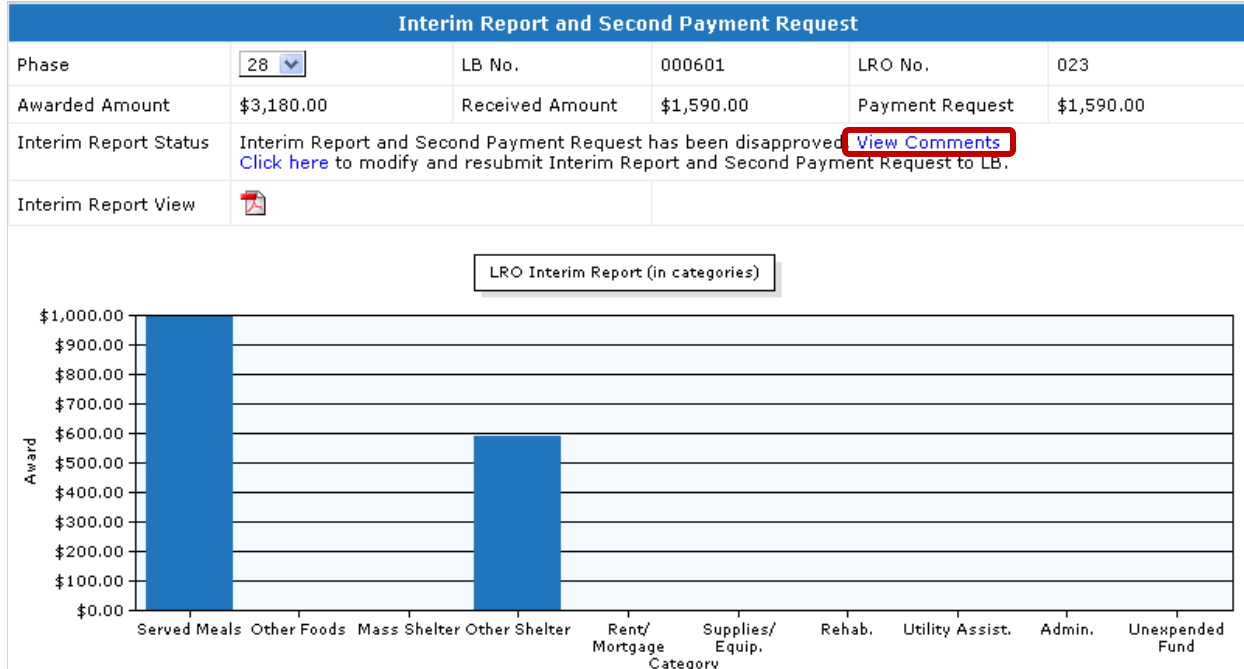
DocuSigned by:  
  
 A2D0843840A74C8  
 LB Chair  
 Signature, Local Board Chair

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.



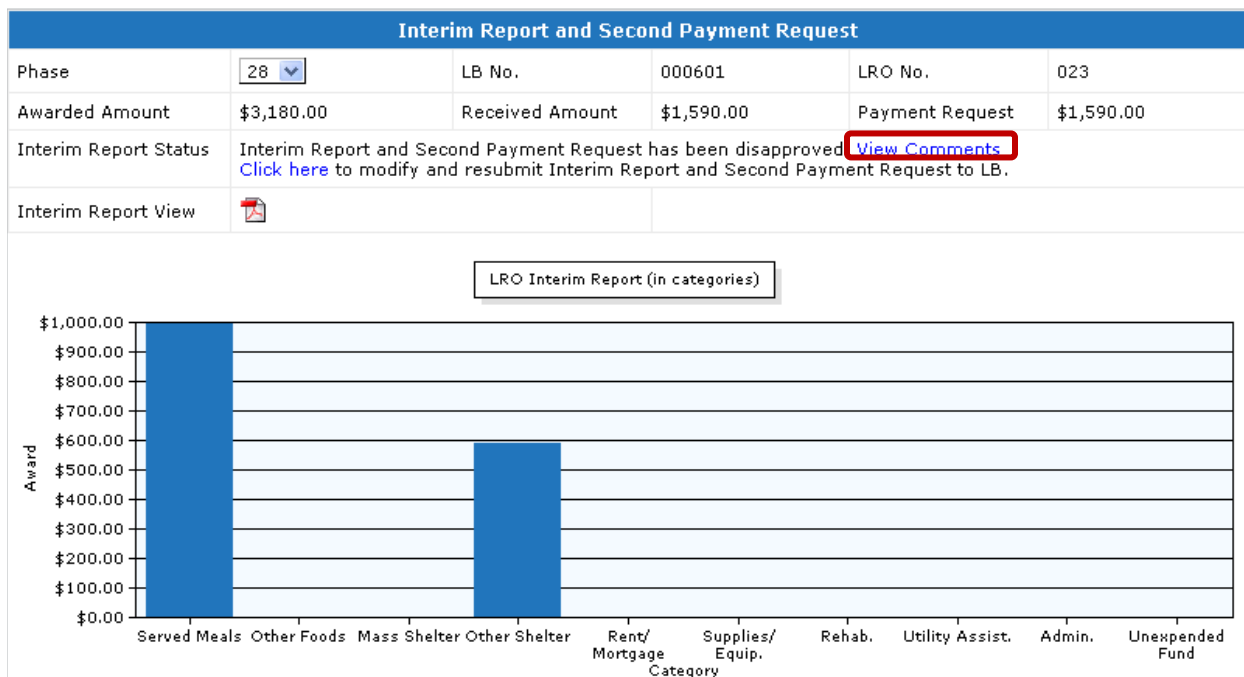
## IF LRO INTERIM REPORT AND SECOND PAYMENT REQUEST IS DISAPPROVED BY THE LOCAL BOARD



1. Click on the View Comments link to see disapproval comments given by LB.
2. Click the **Close** button.

- Click on the Click here link to modify and resubmit Interim Report and Second Payment Request to LB.  
**LRO Interim Report and Second Payment Request for Phase - #** screen appears.
- Modify the Interim Report.
- Click the **Submit to LB and Esign** button.
  - A pop-up message appears that says, "Are you sure to submit Interim Report to LB".
  - Click the **OK** button.
  - A pop-up message appears that says, "LRO Interim Report and Second Payment Request has been submitted to LB successfully."
  - Click the **OK** button.
  - A pop-up message appears that says, "Sending an email link to the LRO for e-signing the 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.
- Then complete the e-signature process.

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



- Click on the View Comments link to see disapproval comments given by LB.
- Click the **Close** button.
- Click on the Click here link to modify and resubmit Interim Report and Second Payment Request to LB.  
**LRO Interim Report and Second Payment Request for Phase - #** screen appears.
- Modify the Interim Report.

5. Click the **Submit to LB and Esign** button.
  - A pop-up message appears that says, "Are you sure to submit Interim Report to LB".
  - Click the **OK** button.
  - A pop-up message appears that says, "LRO Interim Report and Second Payment Request has been submitted to LB successfully."
  - Click the **OK** button.
  - A pop-up message appears that says, "Sending an email link to the LRO for e-signing the 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.
6. Then complete the e-signature process.

## Final Reports

In **Final Report** main-menu, the Contact Person of the Local Recipient Organization can view/print, key and submit Final Report to the Local Board.

**Expended details:** Funds spent by category like served meals, other food, mass shelter, other shelter, supplies/equipment, rehabilitation, rent/mortgage, utilities assist and admin amount. With these expenses, number of meals/nights/bills paid and number of individuals are submitted.

**Interest:** Interest paid by bank or any other financial institution on the awarded amount.

**Unexpended amount:** Un-spent amount.

### A. View/Print Final Report

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

**EFSP** Emergency Food and Shelter National Board Program

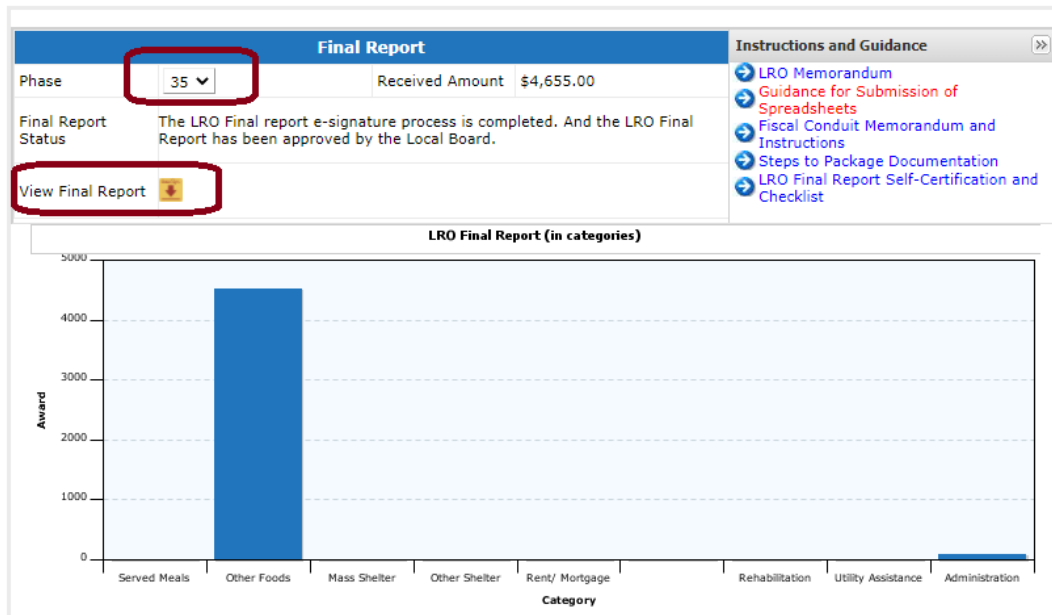
Welcome: LRO Contact (LRO:000000003) Home | Sign Out

Item No.	User Instructions
1	<p><b>Phases 35 and 36 Final Reports Status (as of August 24, 2020)</b></p> <p>The National Board for the Emergency Food and Shelter Program (EFSP) modified the program guidelines for Phases 37 and CARES so that first payments could be released to Local Recipient Organizations (LROs) quickly and without the submission of the Phases 35 and 36 Final Reports. The change was shared with Local Boards and LROs with award information.</p> <p>Staff has been preparing for the release of Phases 35 and 36 Final Reports, including making system changes and updating guidance documents. The changes are nearly completed and it is anticipated that Final Reports will be available to Local Boards and LROs via the EFSP website on Friday, September 4, 2020. There are some changes to the Final Report submission to the National Board and they will be provided in detail to all Local Boards and LROs in a separate communication. It is important that all information regarding Final Reports is read in its entirety.</p> <p><b>Actions Requested:</b></p> <p>Local Boards are requested to prepare locally for the submission of Phases 35 and 36 Final Reports by ensuring LROs have spent their allocations and have gathered the required documentation to support all expenditures made with EFSP funding. Documentation submission requirement for LROs will be noted with the Final Report notification to Local Boards.</p> <p>Local Boards are asked to ensure the Phases 35 and 36 spending period end dates are accurate to prevent potential compliance exceptions by LROs as expenditures made outside of the spending period are considered ineligible and funds will need to be returned to the National Board. If the spending period end date for your Local Board is not accurate, please complete and submit a Spending Period End Date Extension Request form, available under <b>FORMS</b> on the EFSP website.</p> <p>Email notification will be sent to Local Boards when Final Reports are made available.</p> <p>If you have any questions regarding this message or the EFSP, please contact staff at <a href="mailto:efsp@uww.unitedway.org">efsp@uww.unitedway.org</a> or 703.706.9660.</p>

The **Final Report** Screen appears.



2. Select the **Phase** from the drop-down menu. Click the **pdf icon** to view and print the Final Report.



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

## B. Key Final Report

***Condition:** Please **do not** submit the Final Report until all expected payments have been received for each Phase.*

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

The screenshot shows the EFSP website. The header includes 'EFSP' logo, 'Emergency Food and Shelter National Board Program', and a 'Welcome: LRO Contact (LRO-000000003)' message. There are 'Home' and 'Sign Out' links. The left-hand main-menu has several items, with 'Final Report' highlighted. The main content area is titled 'User Instructions' and contains a message about 'Phases 35 and 36 Final Reports Status (as of August 24, 2020)'. The message states that the National Board for the Emergency Food and Shelter Program (EFSP) modified the program guidelines for Phases 37 and CARES so that first payments could be released to Local Recipient Organizations (LROs) quickly and without the submission of the Phases 35 and 36 Final Reports. The change was shared with Local Boards and LROs with award information. Staff has been preparing for the release of Phases 35 and 36 Final Reports, including making system changes and updating guidance documents. The changes are nearly completed and it is anticipated that Final Reports will be available to Local Boards and LROs via the EFSP website on Friday, September 4, 2020. There are some changes to the Final Report submission to the National Board and they will be provided in detail to all Local Boards and LROs in a separate communication. It is important that all information regarding Final Reports is read in its entirety.

**Actions Requested:**

Local Boards are requested to prepare locally for the submission of Phases 35 and 36 Final Reports by ensuring LROs have spent their allocations and have gathered the required documentation to support all expenditures made with EFSP funding. Documentation submission requirement for LROs will be noted with the Final Report notification to Local Boards.

Local Boards are asked to ensure the Phases 35 and 36 spending period end dates are accurate to prevent potential compliance exceptions by LROs as expenditures made outside of the spending period are considered ineligible and funds will need to be returned to the National Board. If the spending period end date for your Local Board is not accurate, please complete and submit a Spending Period End Date Extension Request form, available under **FORMS** on the EFSP website.

Email notification will be sent to Local Boards when Final Reports are made available.

If you have any questions regarding this message or the EFSP, please contact staff at [efsp@unitedway.org](mailto:efsp@unitedway.org) or 703.706.9660.

The **Final Report** screen appears.

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

Final Report		Instructions and Guidance
Phase	35 ▼	Received Amount \$4,655.00
Final Report Status	<a href="#">Click here</a> to enter and submit Final Report to Local Board. Please note that after the Local Board approves the Final Report, it will be sent to the National Board for compliance review. Spreadsheets must be submitted online during the e-signing process. Please reference Sample Spreadsheets and Spreadsheet Templates available under "Forms" on the left of the screen.	
		<a href="#">LRO Memorandum</a> <a href="#">Guidance for Submission of Spreadsheets</a> <a href="#">Fiscal Conduit Memorandum and Instructions</a> <a href="#">Steps to Package Documentation</a> <a href="#">LRO Final Report Self-Certification and Checklist</a>

3. Click on the [Click here](#) link.

Final Report		Instructions and Guidance
Phase	35 ▼	Received Amount \$4,655.00
Final Report Status	<a href="#">Click here</a> to enter and submit Final Report to Local Board. Please note that after the Local Board approves the Final Report, it will be sent to the National Board for compliance review. Spreadsheets must be submitted online during the e-signing process. Please reference Sample Spreadsheets and Spreadsheet Templates available under "Forms" on the left of the screen.	
		<a href="#">LRO Memorandum</a> <a href="#">Guidance for Submission of Spreadsheets</a> <a href="#">Fiscal Conduit Memorandum and Instructions</a> <a href="#">Steps to Package Documentation</a> <a href="#">LRO Final Report Self-Certification and Checklist</a>

LRO Final Report screen appears.

LRO Final Reports for Phase - 35					
LB Number	000000	LRO	003	Audit Finding	Select... ▼
Audit type	Select... ▼	Audit Date		Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended	
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00	
<b>Categories</b>					
(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				
<a href="#">Save without Submit</a> <a href="#">Submit to LB and ESign</a> <a href="#">Close</a>					

4. Enter the LRO's audit information.

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

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

LRO Final Reports for Phase - 35							
LB Number	000000		LRO	003		Audit Finding	Select... ▼
Audit type	Select... ▼		Audit Date			Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended			
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00			
<b>Categories</b>							
(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						
<div> <span>Save without Submit</span> <span>Submit to LB and ESign</span> <span>Close</span> </div>							

- 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	003		Audit Finding	Select... ▼
Audit type	Select... ▼		Audit Date			Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended			
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00			
<b>Categories</b>							

- 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	003		Audit Finding	Select... ▼
Audit type	Select... ▼		Audit Date			Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended			
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00			
<b>Categories</b>							

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

LRO Final Reports for Phase - 35					
LB Number	000000	LRO	003	Audit Finding	Select... ▼
Audit type	Select... ▼	Audit Date		Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended	
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00	
<b>Categories</b>					
(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				
<input type="button" value="Save without Submit"/> <input type="button" value="Submit to LB and ESign"/> <input type="button" value="Close"/>					

8. 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.

LRO Final Reports for Phase - 35					
LB Number	000000	LRO	003	Audit Finding	Select... ▼
Audit type	Select... ▼	Audit Date		Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended	
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00	
<b>Categories</b>					
(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				
<input type="button" value="Save without Submit"/> <input type="button" value="Submit to LB and ESign"/> <input type="button" value="Close"/>					

**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.

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

LRO Final Reports for Phase - 35					
LB Number	000000	LRO	003	Audit Finding	Select... ▼
Audit type	Select... ▼	Audit Date		Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended	
4,655.00	+ 0.00	= 4,655.00	- 0.00	= 4,655.00	
<b>Categories</b>					
(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				
<div> Save without Submit Submit to LB and ESign Close </div>					

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

LRO Final Reports for Phase - 35					
LB Number	000000	LRO	003	Audit Finding	Select... ▼
Audit type	Select... ▼	Audit Date		Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended	
4,655.00	+ 0.00	= 4,655.00	- 55.00	= 4,600.00	
<b>Categories</b>					
(A) Served Meals	0.00	No. of Meals	0	Individuals Served	0
(B) Other Foods	4,520.00	No. of Meals	2,260	Individuals Served	1,100
(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	80.00				
(J) Total Expended	4,600.00				
<div> Save without Submit Submit to LB and ESign Close </div>					

**Note:** Potential Error Messages

- If Total Expended is more than 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. Do you want save this Final Report?" Click the **OK** button. A pop-up message appears that reads, "LRO Final Report saved successfully".

- 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.

11. If data entry is complete, click **Submit to LB and ESign**.

LRO Final Reports for Phase - 35					
LB Number	000000	LRO	003	Audit Finding	Select... ▼
Audit type	Select... ▼	Audit Date		Audit Preparer	
(1) Total Paid	(2) Interest	(3) Total Available	(4) Unexpended	(5) Net Expended	
4,655.00	+ 0.00	= 4,655.00	- 55.00	= 4,600.00	
<b>Categories</b>					
(A) Served Meals	0.00	No. of Meals	0	Individuals Served	0
(B) Other Foods	4,520.00	No. of Meals	2,260	Individuals Served	1,100
(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	80.00				
(J) Total Expended	4,600.00				
<div> <input type="button" value="Save without Submit"/> <input type="button" value="Submit to LB and ESign"/> <input type="button" value="Close"/> </div>					

- 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, “Are you sure you want to submit the LRO Final Report to LB”.
- 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.

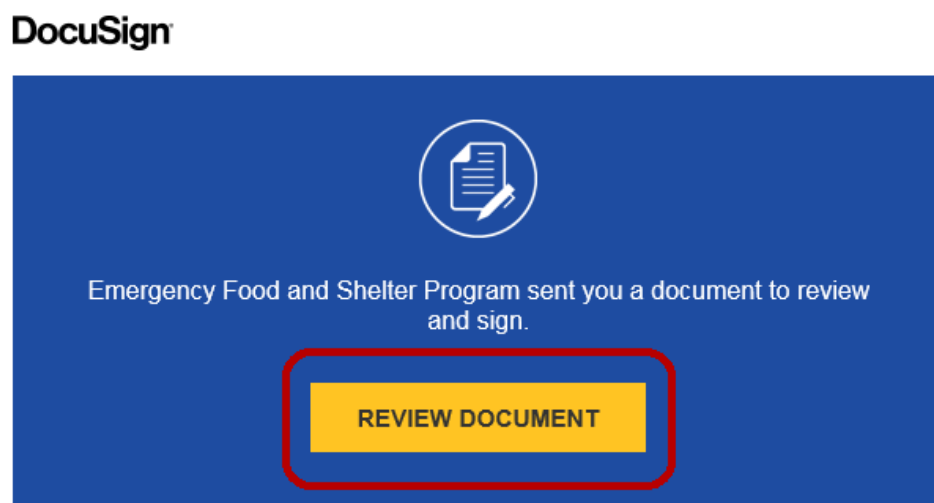
The **Final Report** screen appears with the LRO Final Report (in categories) chart. Final Report Status has changed to “The LRO final report is in the e-signing process. Please check your email to complete the e-signature process.”

Final Report		Instructions and Guidance
Phase	35 ▼	Received Amount \$4,655.00
Final Report Status	The LRO Final report is in the e-signing process. Please check your email to complete the e-signature process.	
		<a href="#">LRO Memorandum</a> <a href="#">Guidance for Submission of Spreadsheets</a> <a href="#">Fiscal Conduit Memorandum and Instructions</a> <a href="#">Steps to Package Documentation</a> <a href="#">LRO Final Report Self-Certification and Checklist</a>

### C. Electronic Signature

After the LRO Final Report is web submitted, an email is sent to the LRO's contact email address in the EFSP database for e-signing.

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 DocuSign

**LRO Contact**  
LRO 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 out of the existing program funds and not from future phases.  
[View More](#)

☒ Please read the Electronic Record and Signature Disclosure.  
☐ I agree to use electronic records and signatures.

**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: 227D4564-2552-4A9C-B0E8-C80675BD7708

**START**

**This report must be filled out by: United Way of Southwest Alabama, Inc.**  
Stewart B. McKinney Homeless Assistance Act  
EMERGENCY FOOD AND SHELTER NATIONAL BOARD PROGRAM

**\*000000\* \*003\***

**LRO Final Report Phase 35**

Submit a signed original plus one copy with documentation if requested 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 ----- **Mobile County, AL**

LRO Number: **003**

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

**LRO ID: 000000 - 003**

**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.**

LRO Contact  
LRO Name  
Business Address  
City, State, Zip

Phone: 000-000-0000  
Fax: 000-000-0000  
NDR \$4,655.00

(1) Total Paid	\$	4,655.00
(2) Interest income earned	\$	0.00
(3) Total available for program	\$	4,655.00
(Add lines 1 & 2)		
(4) Less award amount	\$	55.00
unexpended as of: 01/31/2019		
(5) Net expenditures (3 less 4)	\$	4,600.00

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

Select the sign field to create and add your signature.

**FINISH** **OTHER ACTIONS**

(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	\$4,520.00	2260	1100				
<b>Shelter:</b>		Nights	Individual	<b>Energy:</b>		Bills Paid	Individual
(C) Expenditures for mass shelter Number of nights* lodging from these funds. (on-site shelter)	\$0.00	0	0	(H) Expenditures for utility assistance to an individual or family. Number of bills paid.	\$0.00	0	0
(D) Expenditures for other shelter Number of motel/hotel nights	\$0.00	0	0	<b>Administration:</b>			
(E) Expenditures for rent/mortgage Number of bills paid from these funds	\$0.00	0	0	(I) Administrative costs incurred (You are allowed up to 2.00% of your award if approved by Local Board.)	\$80.00		
<b>Supplies/Equipment:</b>				<b>Grand Total:</b>			
(F) Expenditures for supplies/equipment	\$0.00			(J) Total amount expended (Add A-I, must match (5) above)	\$4,600.00		

**SIGN** **Sign**

LRO Authorized Signature

Local Board Member Signature (Local Board Review and Approval)

1 of 2

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\***

LRO Contact LC

**SELECT STYLE** **DRAW**

**PREVIEW** [Change Style](#)

DocuSigned by: DS

LRO Contact LC

2493B624767E446...

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:
  - 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.



X

## Adopt Your Signature

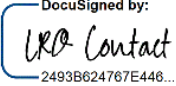
Confirm your name, initials, and signature.


\* Required

**Full Name\***  **Initials\***

**SELECT STYLE** **DRAW**

**PREVIEW** [Change Style](#)

DocuSigned by:  
  
2493B624767E448...

DS  


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.

7. Submit spreadsheets.

a. Choose one of the options to upload spreadsheets.

**Option 1:** Scan the spreadsheets for all funded categories into a single PDF file. The spreadsheets must be sorted by category.

**Option 2:** Upload spreadsheet for each funded category.

DocuSign Envelope ID: 22A07AB7-5582-4290-9D22-E6A565BE1001

Choose one of the options below to upload spreadsheets.  
Once the spreadsheets are uploaded, please scroll down to review for accuracy. The maximum file size is 25MB.

**CHOOSE** ☐ **Option 1:** Scan the spreadsheet for each funded category into a single PDF file, and upload it here. Please be sure to sort the spreadsheets by category.

☐ **Option 2:** Upload spreadsheet for each funded category.

b. If **Option 1** is selected, click on the paperclip to upload a single PDF file.


Select one radio button **FINISH**

DocuSign Envelope ID: 22A07AB7-5582-4290-9D22-E6A565BE1001

Choose one of the options below to upload spreadsheets.  
Once the spreadsheets are uploaded, please scroll down to review for accuracy. The maximum file size is 25MB.

☒ **Option 1:** Scan the spreadsheet for each funded category into a single PDF file, and upload it here. Please be sure to sort the spreadsheets by category.

☐ **Option 2:** Upload spreadsheet for each funded category.

**NEXT** 

- c. If **Option 2** is selected, click on the paperclip for each category to upload the spreadsheets. Each paperclip only allows to upload a single file.

Select one radio button

FINISH OTHER ACTIONS

Choose one of the options below to upload spreadsheets.  
Once the spreadsheets are uploaded, please scroll down to review for accuracy. The maximum file size is 25MB.

☐ Option 1: Scan the spreadsheet for each funded category into a single PDF file, and upload it here. Please be sure to sort the spreadsheets by category.

☒ Option 2: Upload spreadsheet for each funded category.

Other Food

Administration

NEXT

- d. Click **Upload A File** to select the file from your computer, then click “**Done**”.

Upload Attachment

UPLOAD A FILE

DONE

- e. The uploaded file name appears. If it is not the correct file, click **X** to delete the file, then load the correct one. Click **Done** to complete uploading spreadsheets.

Upload Attachment

Test - Other Food.pdf  
3 pages

X

DONE

- f. Spreadsheets are uploaded successfully.

Done! Select Finish to send the completed document.

FINISH OTHER ACTIONS

Choose one of the options below to upload spreadsheets.  
Once the spreadsheets are uploaded, please scroll down to review for accuracy. The maximum file size is 25MB.

☐ Option 1: Scan the spreadsheet for each funded category into a single PDF file, and upload it here. Please be sure to sort the spreadsheets by category.

☒ Option 2: Upload spreadsheet for each funded category.

Other Food

Administration

- g. Scroll down to preview spreadsheets. Please ensure the spreadsheets are complete and readable. If the spreadsheets are not in the proper format, please resubmit.

Done! Select Finish to send the completed document.

**FINISH** **OTHER ACTIONS**

Phase Number: 35  
LRO Name: Sample Food Bank  
LRO ID (9 digits): 0000-00-003

Spreadsheets alone are not sufficient. Documentation must be obtained, maintained, retained and submitted to EFSP (if required) to support all expenditures made with EFSP funds.

**OTHER FOOD EXPENDITURES**

Payment/Check Number	Payment /Check Date (MM/DD/YY)	Payment /Check Clear Date (MM/DD/YY)	Invoice/Receipt Date (MM/DD/YY)	Invoice/Receipt Number (If no number, enter N/A)	Vendor Name	Invoice/Receipt Amount	Total Check Amount	EFSP Portion of Check Amount
9128	09/01/18	10/01/18	N/A	N/A	Sample Market	500.00	500.00	500.00
9135	09/29/18	10/15/18	09/20/18	AR-6631285-1	Sample Market	754.00	754.00	754.00
9147	10/08/18	11/01/18	10/06/18	AR-6631291-1	Sample Market	906.00	906.00	906.00

8. Submit documentation (optional).

If supporting documentation (invoices, canceled checks, utility bills, etc.) is required, your agency will be listed as a DR on the Final Report, and the submission status will be printed in the center of the Final Report. Documentation is not required to submit to EFSP when per meal, per diem and mileage logs are used. Documentation is also not required to submit to EFSP for administrative costs.

documents below.

**FINISH** **OTHER ACTIONS**

LRO Contact  
LRO Name  
LRO Address  
City, State 00000  
Phone: 000-000-0000  
Fax: 000-000-0000  
**DR** \$12,697.00

**Spreadsheets and Documentation (invoices and checks) for all expenditures must be submitted with this report to your Local Board for review.**

(1) Total Paid	\$	12,697.00
(2) Interest income earned	\$	0.00
(3) Total available for program (Add lines 1 & 2)	\$	12,697.00
(4) Less award amount unexpended as of: 01/31/2018	\$	0.00
(5) Net expenditures (3 less 4)	\$	12,697.00

Food:	Meals	Individual
(A) Expenditures for served meals	\$9,289.00	4500 3000
(B) Expenditures for other food	\$3,340.00	1700 1000


**Emergency Repairs/Building Code:**  
(G) Expenditures to rehabilitate a facility due to building code citation \$0.00

- a. Click on the paperclip to upload a single PDF file. The maximum file size is 25MB. Be sure that all documents are readable in the same order as listed on the spreadsheets. If the required documentation is not uploaded, your Final Report submission is considered as incomplete until the required documentation is submitted to your Local Board.

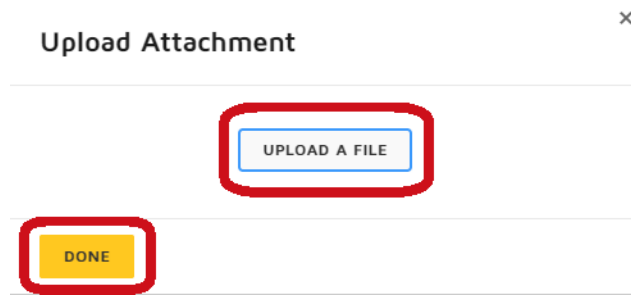
Select Finish to send the completed document.

**FINISH** **OTHER ACTIONS**

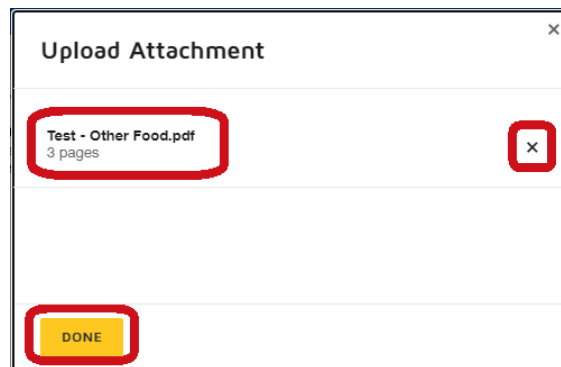
Upload documentation - Your agency is selected to submit supporting documentation (canceled checks, invoices, etc.). Scan documentation into a single PDF file. Be sure that all documents are readable in the same order as listed on the spreadsheets. The maximum file size is 25MB. If the required documentation is not uploaded, your Final Report submission is considered as incomplete until the required documentation is submitted to your Local Board.

 Optional

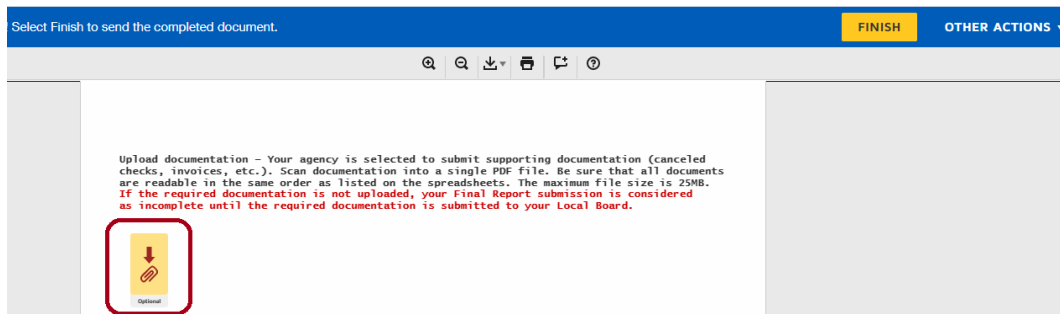
- b. Click **Upload A File** to select the file from your computer, then click “**Done**”.



- c. The uploaded file name appears. Click **X** to delete the file and resubmit, or click **Done** to complete uploading documentation.



- d. Documentation is uploaded successfully.



- e. Scroll down to preview documentation. Please ensure the documentation is complete and readable. If the documentation is not in the proper format, please resubmit.

9. Confirm signing.

When you finish clicking all required tags and reviewing all documentation, confirm signing by clicking **Finish**.

								Total	\$4,520.00

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@uwuw.unitedway.org

Password

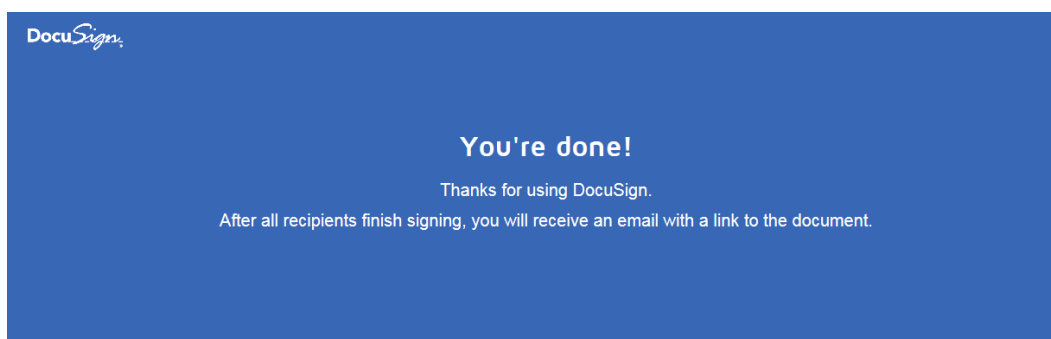
Confirm Password

Country  
-- select --

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

**SUBMIT** **NO THANKS**

A message appears stating that you have completed your document. **Your LRO Final Report will now be sent to the Local Board Contact to approve and electronically sign.**



First, you will be notified after the Local Board Contact views the LRO Final Report. After the Local Board Contact approves and signs the LRO Final Report, you can now download a PDF copy or print a copy of the document on the EFSP website. The status of the Final Report changes to “The LRO Final report e-signature process is completed.”

10. Click on download icon to view/download the signed LRO Final Report.

**Final Report**

Instructions and Guidance >>

Phase: 35

Received Amount: \$4,655.00

Final Report Status: The LRO Final report e-signature process is completed. And the LRO Final Report has been approved by the Local Board.

[LRO Memorandum](#)

[Guidance for Submission of Spreadsheets](#)

[Fiscal Conduit Memorandum and Instructions](#)

[Steps to Package Documentation](#)

[LRO Final Report Self-Certification and Checklist](#)

**View Final Report**

**LRO Final Report (in categories)**

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

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

**This report must be filled out by: United Way of Southwest Alabama, Inc.**

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

**\*000000\* \*003\***

**LRO Final Report  
Phase 35**

Submit a signed original plus one copy with documentation if requested to your Local Board no later than 10/15/2020. 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 ----- **Mobile County, AL**

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

LRO Number: **003**

LRO ID: **000000 - 003**

**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.**

LRO Contact  
LRO Name  
Business Address  
City, State, Zip

Phone: 000-000-0000  
Fax: 000-000-0000  
NDR \$4,655.00

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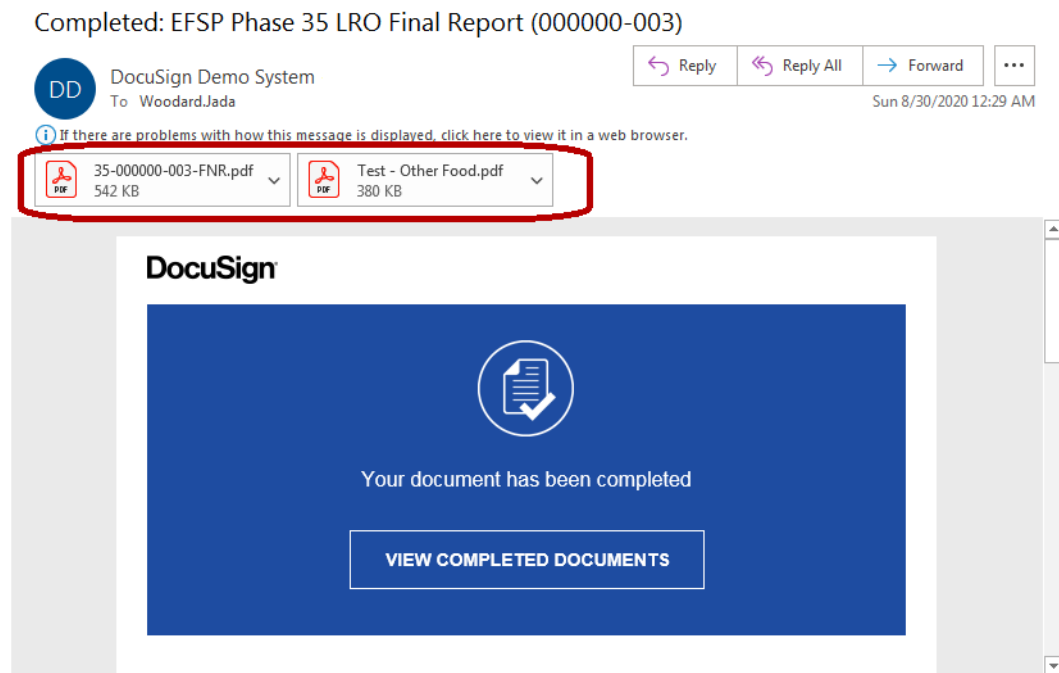
DocuSigned by:

LRO AUTHORIZED Signature

DocuSigned by:

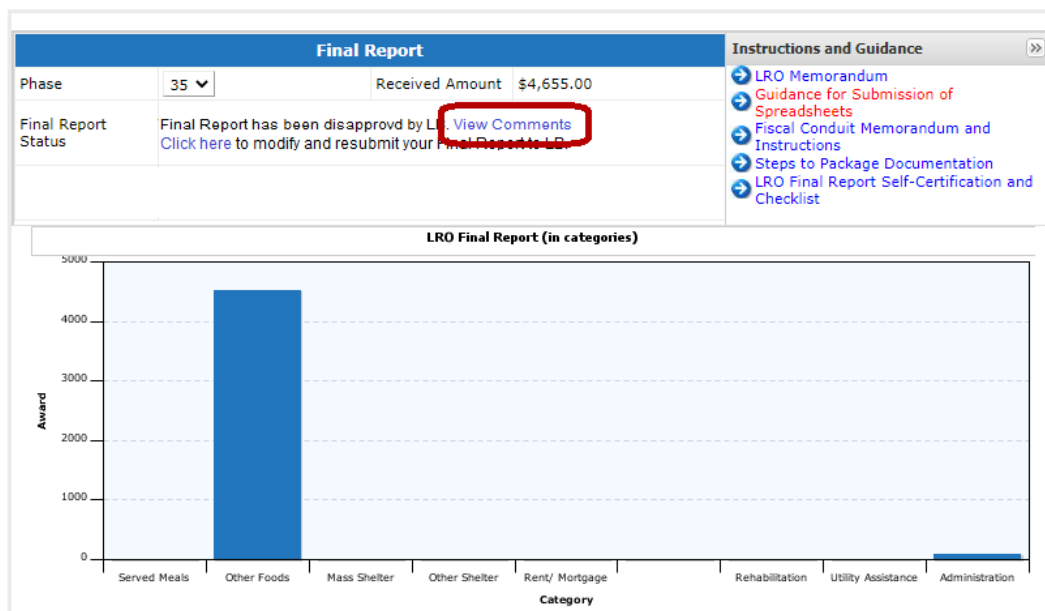
24938024707E446  
Local Board Member Signature  
(Local Board Review and Approval)

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

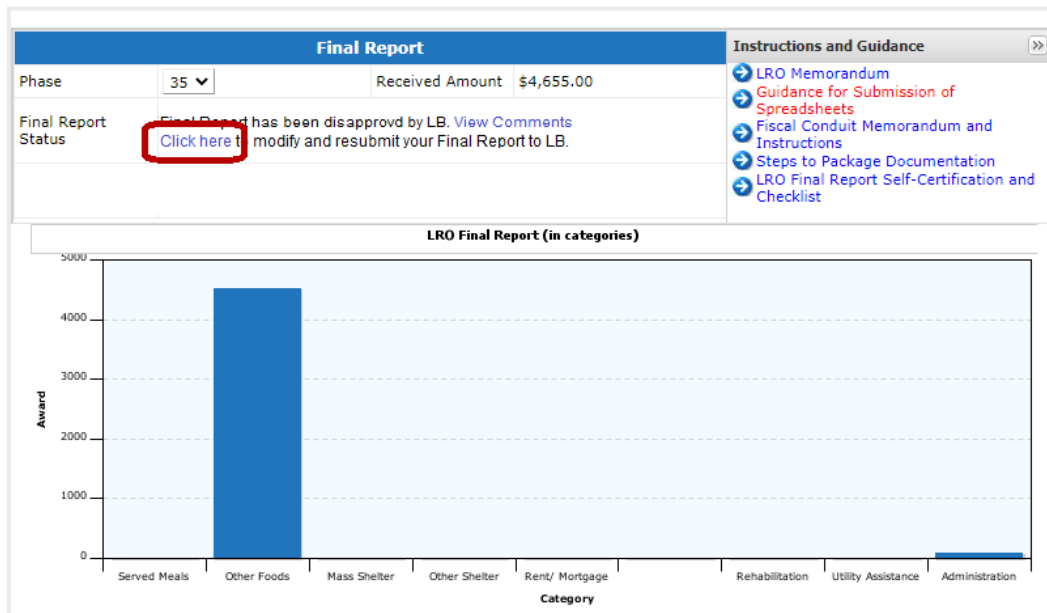


**D. If an LRO Final Report is Disapproved by the Local Board.**

1. Click on the **View Comments** link to see disapproval comments given by LB. Then click **Close**.



2. Click on the **Click here** link to modify and resubmit the Final Report to LB.



3. Modify the Final Report.
4. Click the **Submit to LB and Esign** button.
5. Then complete the e-signature process.

#### E. If the LRO Final Report was Keyed by Local Board.

If the Local Board completes the web submission on behalf of the LRO, the LRO will receive an email to sign off on the LRO Final Report submitted by the Local Board. Please follow the e-signature process to accept the LRO Final Report.

#### F. Submitting the LRO Final Report after the Local Board Final Report has been Submitted to the National Board.

If the LRO did not submit the LRO Final Report before the Local Board submits the Local Board Final Report, the LRO will be marked as "Did Not Report". To complete the Final Report and remove the account hold created by not submitting, the LRO must contact the Local Board to get a copy of the Blank LRO Final Report. The Blank Final Reports can only be accessed after the Local Board has submitted the Local Board Final Report to the National Board online.



## Variances

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Variances are requested by Local Boards, not LROs. LROs can view existing Variance requests.

### A. View Existing Variance Request

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

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

Variances			
Phase : 32 ▼			
Category	Amount	Request	Status
Other Foods	\$1,300.00	The Local Board requests the release of the second payment to the LRO.	EFSP Action: Accepted NB Action: Approved

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.*

All the Variance requested in the selected Phase appear in the list.

## Manage Personal Info

In the **Manage Personal Info** main-menu, the Contact for the Local Recipient Organization can view, edit and save LRO information.

### A. Manager Personal Information

1. Click on **Manage Personal Information** on the main-menu.  
**Edit Personal Information** screen appears with the LRO's personal information.

Edit Personal information					
LB No.	000000	LB Name	Sample County, State		
LRO No.	002	LRO Name	Sample Food Bank		<input type="checkbox"/> Deleted
Contact	LRO Contact		Salut.	Affiliation	
Address	Address			Target1	UN - Unaffiliated with
				Target2	FC - Families with chil
				Target3	EL - Elderly
City-State-Zip	City	AL	0	HC Access	OT - Other targeted p
EIN	12-3456789	Fiscal Agent	<input type="checkbox"/>		
ABA No.	XXXXX1186	DUNS No.	123456789	Service Provider EIN	
Phone	555-555-5555	Ext		Account No.	XXXX7039
		Fax		Password	*****
Email	kelly.andreae@uww.unitedway.org			Confirm Password	*****
Web Site					
<div><input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Undo"/></div>					

2. Click the **Edit** button.
3. Enter the LRO personal information.
4. Click the **Save** button.  
A pop-up message appears that says, "LRO Information updated successfully".
5. Click the **OK** button.  
**Edit Personal Information** screen appears.

**Note:** LRO Name, FEIN, Bank Information and DUNS Number cannot be edited from the website. To update your Bank Information please fill out the EFT form available on the main menu and follow the instructions on the form. To update your DUNS information please fill out the DUNS Information form available on the main menu and follow the instruction on the form. To update your LRO Name or FEIN number please submit the appropriate IRS paperwork and/or incorporation documentation with a letter stating your request to [documentstoefsp@uww.unitedway.org](mailto:documentstoefsp@uww.unitedway.org).

# Training Workshops

In **Training Workshops** main-menu, the LRO contact can view recorded Training Webinars.

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

The screenshot displays the EFSP (Emergency Food and Shelter National Board Program) website. The header includes the EFSP logo, the program name, and a welcome message for LRO Contact (LRO-003400002). A navigation bar contains links for Home and Sign Out. A left sidebar lists various menu items, with 'Training Workshops' highlighted in yellow. The main content area is titled 'Training Workshops' and contains an introductory paragraph about the program's purpose. Below this, a section titled 'Recorded Training Webinars' lists ten webinars, each with a brief description and a link to view the recording. The webinars include topics such as 'What is Docusign', 'Second Payment Request & Interim Report (for LROs)', 'Second Payment Request & Interim Report (for Local Boards)', 'Eligible and Ineligible Expenditures', 'Reallocation', 'Audit Requirements', 'EFT', 'Local Board Plan', 'Certifications Forms', 'EFSP Overview', and 'Final Reports (for LROs)'.

**EFSP** Emergency Food and Shelter National Board Program

Welcome : LRO Contact (LRO-003400002)

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, LRO contacts 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 (Emergency Food and Shelter National Board Program) website. The header includes the EFSP logo, a welcome message for LRO Contact (LRO-003400002), and links for Home and Sign Out. A left sidebar contains a menu with items like EFSP Website Guide, Forms, DUNS, Reports, LRO Plan, Interim & 2nd Pymt, Final Report, Variances, Manage Personal Info, Change Password, Training Workshops, What Makes Sense; What Works (highlighted), Key Program Dates, EFT Form, Quick Reference Guides, EFSP Manual, Key Changes And Clarifications, and Addendum To Program Manual. The main content area is titled 'Good Practices' and contains the following text:

**Good Practices**

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.

**What Makes Sense: What Works**

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.

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.

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.

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.

**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.

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 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, the LRO Contact can print the important due dates (deadlines) of Current Phase.

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

The screenshot shows the EFSP (Emergency Food and Shelter National Board Program) website interface. The top header includes the EFSP logo, the text "Emergency Food and Shelter National Board Program", and a welcome message for "LRO Contact (LRO-003400002)". There are links for "Home" and "Sign Out". A left sidebar contains a menu with various options, including "Key Program Dates" which is highlighted. The main content area shows a dropdown menu for "Phase:" set to "35". Below this is a table with three columns: "Item No.", "Key Program Dates", and "View". The table contains one row with "1" in the first column, "Key Program Dates - Phase 35" in the second, and a "View" icon in the third.

EFSP  
Emergency Food and Shelter National Board Program

Welcome : LRO Contact (LRO-003400002)  
Home | Sign Out

Phase: 35

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