Helpful System Hints for Direct Funding Simplified Agreements

Purpose

This document provides additional information on the features of the *Direct Funding Financial Reporting System* (DFFRS) for Simplified Agreements.

This document is one of several supporting documents that provide information on how to manage funding and report to CLBC on *Direct Funding Simplified Agreements*. This document should be used in conjunction with the *Direct Funding Simplified Agreements – Training Video* (How to use the system and report to CLBC for Simplified Agreements), *Managing the Money: Direct Funding Simplified Guide* (How to use the system and manage your funding), and the *FAQs: Reporting on Simplified Agreements (Agents)*. The training video and these documents can be found together at www.communitylivingbc.ca/IF under the "Learn more about Individualized Funding" section.

Table of Contents

Getting Started

Agreement Not Found Error Message

The "Agreement Not Found" message is displayed.
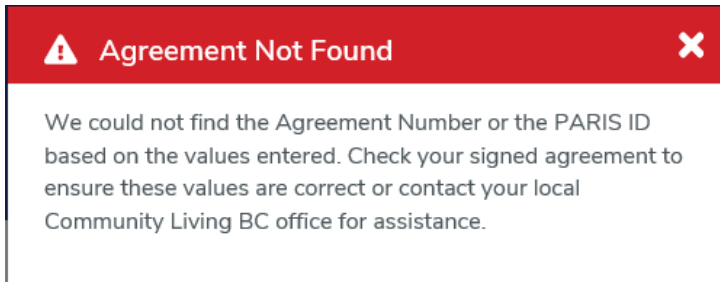
The Agreement Number can be found on Page 1 and the PARIS ID can be found on Page 5 of the *Direct Funding Simplified Agreement* ('Agreement').   If the information matches and you continue to get the error message, contact your CLBC analyst for further investigation.

Who is the CLBC analyst?

The name and contact information of the CLBC Analyst (Quality Service Analyst) is listed on page 4 (signature page) of the Agreement.

## Submitting a Report Against an Expired Agreement

When submitting a report against an expired Agreement, a warning dialog box is displayed.
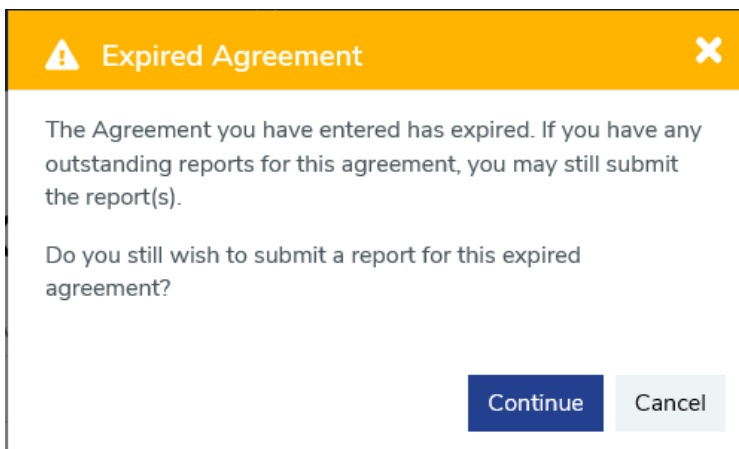
Click the "Continue" button to proceed with submitting your report for the expired Agreement.
Click the "Cancel" button or "X" to close the dialog box. This will take you back to the Getting Started page which will allow you to make changes to the Agreement Number and/or Paris ID.

Submitting a Report Against an Agreement that has been Replaced

When submitting a report against an Agreement that has been replaced (the Agreement numbers are different), a warning message is displayed.
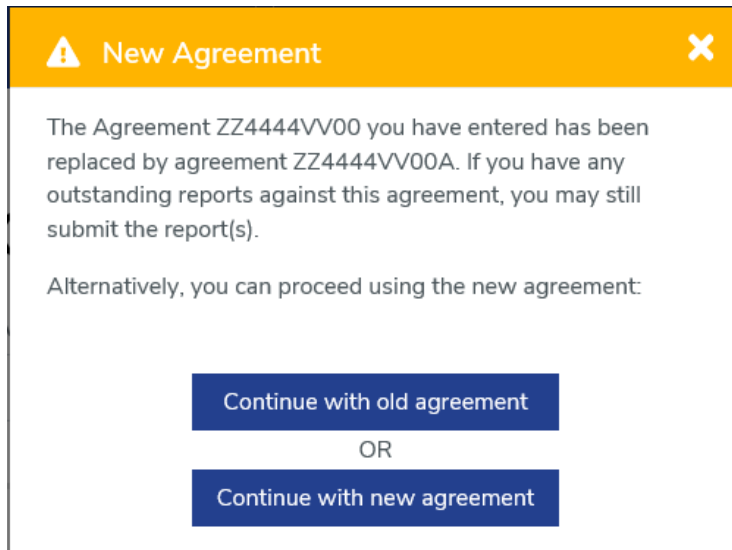
Click "Continue with old agreement" to submit a report for the old Agreement.
Click "Continue with new agreement" to submit a report for the new Agreement.
Click the "X" button to close the dialog box. This will take you back to the Getting Started page which will allow you to make changes to the Agreement Number and/or Paris ID.

Reporting Details

Reporting Frequency

Reports must be submitted for each six-month period or less, depending on the length of the Agreement term.

> **Example 1**: An Agreement with a term starting January 1, 2018 and ending on March 31, 2019 requires Compliance Reports for the following periods:
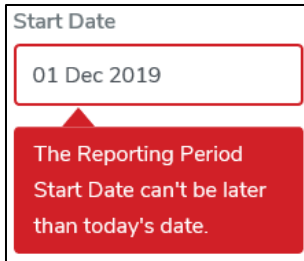>
> - January 1, 2018 to June 30, 2018 (6 months)
> - July 1, 2018 to December 31, 2018 (6 months)
> - January 1, 2019 to March 31, 2019 (3 months)

> **Example 2**: An Agreement with a term starting July 18, 2018 and ending on June 30, 2020 requires Compliance Reports for the following periods:
>
> - July 18, 2018 to December 31, 2018 (6 months including one partial month)
> - January 1, 2019 to June 30, 2019 (6 months)
> - July 1, 2019 to December 31, 2019 (6 months)
> - January 1, 2020 to June 30, 2020 (6 months)

Entering a Reporting Period Start Date Later than Today's Date

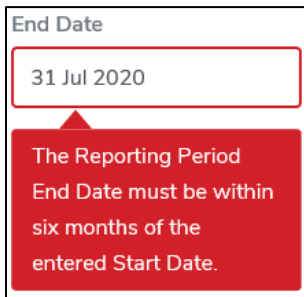When entering a Reporting Period Start Date later than today's date, an error message is displayed.

Start Date

01 Dec 2019

The Reporting Period Start Date can't be later than today's date.

Reports cannot be submitted with a start date in the future.

Reporting Period Greater than Six Months

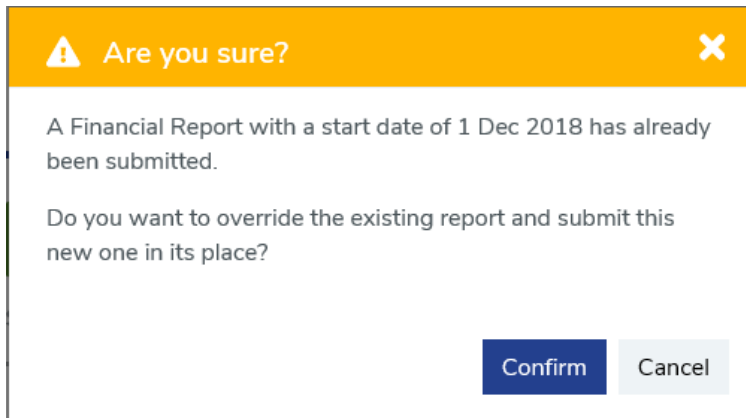When entering a Reporting Period that spans more than six months, an error message is displayed.

End Date

31 Jul 2020

The Reporting Period End Date must be within six months of the entered Start Date.

Reports must be submitted for each six-month period or less, depending on the length of the Agreement term. **See Reporting Frequency above**.

Entering a Reporting Period Start Date that has been Previously Submitted

When entering a Reporting Period Start Date that has been previously submitted, a warning message is displayed.

⚠ **Are you sure?** ✖

A Financial Report with a start date of 1 Dec 2018 has already been submitted.

Do you want to override the existing report and submit this new one in its place?

Confirm   Cancel

Click the "Confirm" button to submit a report for a period whereby a report has already been submitted. Click the "Cancel" button or "X" to close the dialog box. This will take you back to the Reporting Details page which will allow you to make changes to the Reporting Period Start Date.

Entering a Reporting Period End Date Later than Today's Date

When entering a Reporting Period End Date later than today's date, a warning message is displayed.
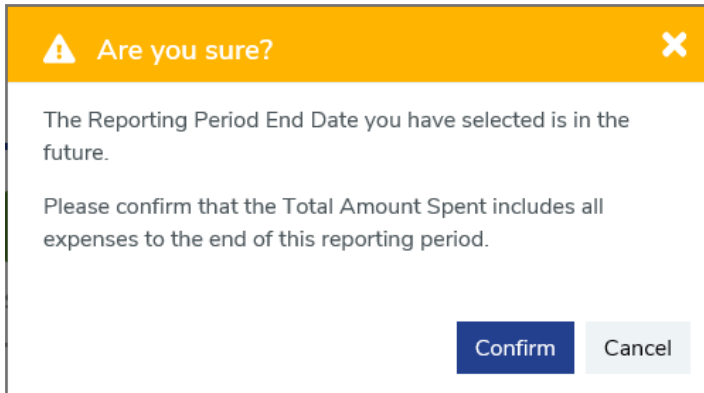
Click the "Confirm" button to proceed with the report.
Click the "Cancel" button or "X" to close the dialog box. This will take you back to the Reporting Details page which will allow you to make changes to the Reporting Period End Date.

Confirm Reporting Period Start Date

The "Confirm Reporting Period Start Date" message is displayed when a report has not been submitted for the reporting period indicated.
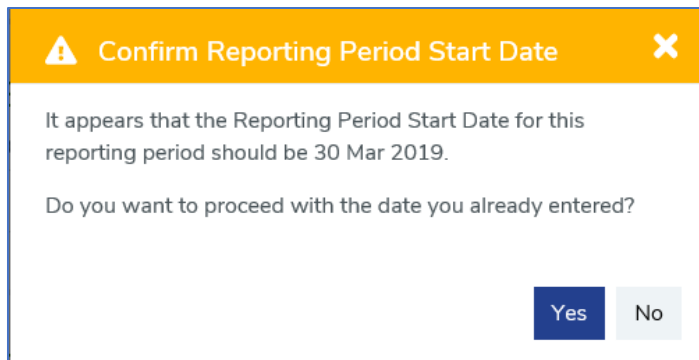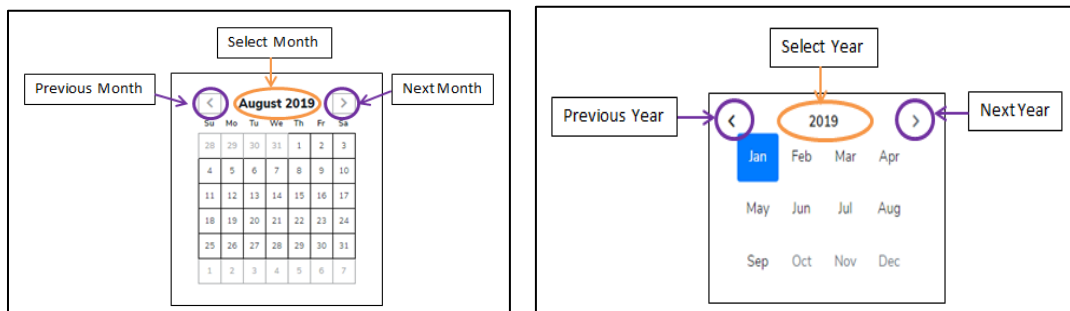

Click the "Yes" button to continue with the Reporting Period Start Date.
Click the "No" or the "X" button to go back to the Reporting Details page to change your reporting period.

Other

Navigating Pop-up Calendars

Click on the arrows to navigate to the previous or next month. Click the month or year to display and select other months and/or years.

Modifying a Submitted Report

Modifying a report that has already been submitted is not permitted. However, a new report using the same reporting period can be re-submitted. This will replace the old report.

Clicking the Back Button in the Browser

The back button in the browser is disabled. Click the "Previous Step" button or one of the progress bar numbers to go back to the previous page(s).
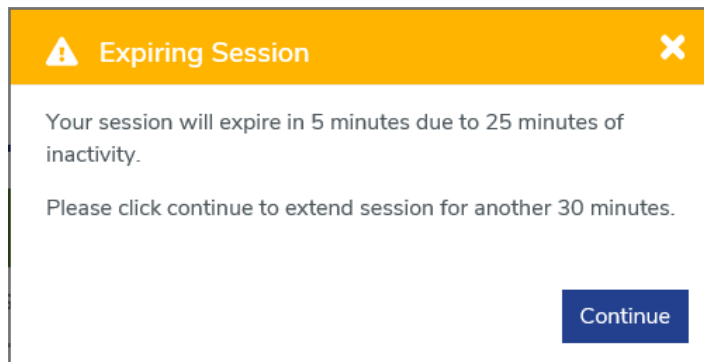

Submitting for a Reporting Period Greater than One Month Ago

Submitting reports that you have missed in the past is permitted.

Session Expiry Messages
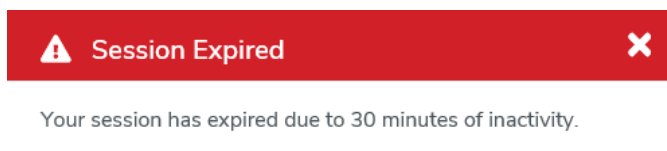
Expiring Session

The "Expiring Session" message is displayed.

Click "Continue" if more time is required to submit the report. Information entered will be retained. Click the "X" button to close the dialog box. The reporting session will end in 5 minutes.

Session Expired

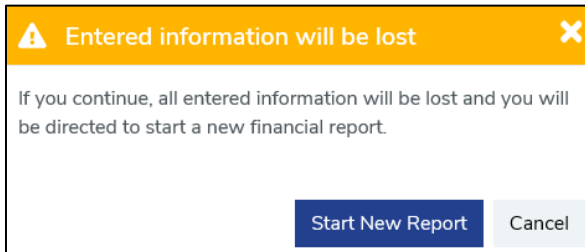The "Session Expired" message is displayed.

Click the "X" button and it will take you back to the Getting Started page. Information entered will not be retained.

Cancelling a Report in Progress

Click the "Cancel" button at the bottom of the page beside the "Next Step" button or beside the "Submit" button to cancel a report in progress and start a new report.

The "Entered information will be lost" message will display.

Click the "Start New Report" button and it will take you back to the Getting Started page. Information entered will not be retained.

Click the "Cancel" button to stay on the Reporting Details page.