

PILOTEER GO LIVE EMAIL 4/26/2017

To: FDP Expanded Clearinghouse Pilot FDP-EC-PILOT-L@LSW.NAS.EDU
Subject: FDP Expanded Clearinghouse – Web-Based System is Live!
Attachments: pdf of Go live Email; Full Instructions; POC listing

Hello Piloteers!

The FDP Expanded Clearinghouse Web-Based System is now live!

THE SYSTEM IS VERY USER FRIENDLY; HOWEVER IT IS IMPORTANT THAT YOU DO THE FOLLOWING BEFORE LOGGING INTO THE SYSTEM:

- 1. Read the overview and notes below in this email (*pdf also attached*)** - these are initially intended for the Profile Points of Contact at Pilot Organizations as they will be the first ones able to log in. But this information is useful for all that will interact with the system!
- 2. Fully read the attached detailed system instructions** to become familiar with the system functionality.

Please Note: For any questions, comments or feedback – Please email fdpechelp@gmail.com rather than replying to the whole listserv.

Online Profile Due Date - Please enter your online Profile and submit to FDP by COB May 10th.

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



STEP 1: CREATE ORGANIZATION

Initial login to the system:

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

****Only Organizational Owners will be able to initially log in. They will be responsible for creating other users at their organization. Organization Owners have automatic “User Manager” and “Profile Editor” authorization rights and may grant themselves “Profile Certifier” permissions, as appropriate.**

Help page with system instructions and web demo

- 3) Once logged in, navigate to “Help” on the main navigation bar and read through the instructions for detailed information about the system (also attached to this email). An informal, but very helpful, web demo has been recorded to help orient you to the system in addition to reading the instructions. The video may be viewed by clicking *View the instructional video* also located under “Help”.

- 4) Please note: Throughout the profile, question mark icons are located in the top right corner or by some specific sections. Clicking on the question mark will take the user to the instructions associated with the section of the profile being completed.

Create / "Add Organization"

- 5) After reading the Instructions, the Organizational Owner can now create an Organization Profile by clicking "Add Organization" and entering Profile information. The first page requires three pieces of information to create a Profile: Legal Entity Name, Primary EIN, and Primary DUNS.

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

- 6) It is important to enter the organization's official legal name, as listed in the Excel Profile or as in SAM.gov. There is also a field for "Common Name" in the General Information section of the Profile. This is the name that will be used in the Participating Organizations listing.
- 7) Some fields allow for copy and paste from the Excel Profile, however please note that in a few places the leading zeros on some #'s will not copy and paste over.
- 8) For questions with drop down lists, you will need to make that selection and cannot copy and paste.

STEP 2: COMPLETE / SUBMIT PROFILE

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

- 9) Once the Organization Profile has been saved, additional organization "Users" may be granted access the system by creating a login account. While the Profile is in Draft/Edit mode, click the "Manage Users" button at the top right of the screen to create the new user account. Then click "+Add User" and complete the user's information and select one or more permissions: Profile Editor, Profile Creator and/or Profile Certifier.
- 10) The "Contacts" tab/section is to add contact names to the profile, such as Primary Contact, SAM Point of Contact, FFATA Contact, and so on. Adding contacts to the profile does not create an automatic "User" account for the contact. The "Contacts" tab/section appears after clicking "Save" on the Add New Organization Page and the Profile opens into multiple tabs.

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

Submitting your Profile

- 11) Once all information has been inputted and your Profile is complete, navigate to the "Authorization" tab. If any information has been missed or entered incorrectly, a list of errors will appear under *Profile Validation*. Should there be an error, navigate back to the appropriate section to add or update missing or incorrect data.
- 12) When there are no validation errors, the Profile may be submitted to the Profile Certifier by selecting "Submit for Certification".

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

STEP 3: CERTIFY PROFILE

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

STEP 4: PUBLISH PROFILE

14) FDP administrators will review submitted Profiles regularly and, if all information appears appropriate, will approve and publish the Profile. The Profile will then appear in the list of Participating Organizations for public viewing.

15) As Profiles are published online, the link to the Excel Profile will be replaced with a link to the web-based system.

~~~~~

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

16) Users can update their published Profile by selecting it from their “My Dashboard”, making the appropriate updates and submitting back to the Profile Certifier. Updates must also go through the same process as described above for certifying, submission, approval and publishing.

17) Users can “retract” Profiles once they have been submitted by a Profile Editor or certified by a Profile Certifier. The Profiles must be retracted in the exact reverse order of the process described above. Only Profile Certifiers can retract from request to publish and then Profile Editors can retract from Profile Certifiers.

18) The previously published Profile will stay in place until the updated Profile is fully approved and published.

#### ***Slight differences between the Excel Profile and this new web-based system***

Some things to note about the system as compared to the Excel Profile:

- For the most part we have utilized the exact same wording and data elements from the Excel Profile with the following exceptions:
  - The question that previous asked about “Parent, State or Audit Entity” is now simply asking if there is a “Primary Audit Entity” for the organization. The language in this section has been adjusted slightly to correspond and a couple of minor data fields eliminated.
  - We have removed the AAHRPP Assurance # field, as assurance #'s are not provided and this field had only been completed by a couple of organizations previous, using the approval date.
- Optional fields from the Excel Profile now have a “Not Applicable” option. We encourage everyone to try to complete as much information as your organization has available, but will still allow for the NA option on some fields. All fields must be completed even if it is to select the NA option.
- Note some label changes – entity is now organization, etc.
- Remember that we are using two different format of #'s for OLAW. Please enter both, as currently listed on the Excel Profiles.
- **This first version of the system contains a simple print function. To save the Profile as a PDF, select “print to PDF” instead of printing to a printer, and then save the PDF.**
- Most responses will allow for only one code or response.
- Each section has a comment section at the bottom of the section, and additional codes, responses or information can be added in the comment section. Please reference the question or data element that the response corresponds to. Remember that these comments will be visible to all.

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

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

Lynette, Pamela and Jennifer (co-chairs)

And the FDP Expanded Clearinghouse Working Group and System Development Group