

Submitting Board Plans via the EFSP Web Site

1. From the EFSP web site at <http://www.efsp.unitedway.org> scroll down the main page to the feature called “LB and LRO Information Pages”.
2. Begin by entering your Local Board jurisdiction number and password in the boxes provided.
3. The Local Board and LRO Page will be displayed with option selections listed in a blue box. Select “**Local Board Plan**”.
4. The next page will show the award(s) and the dollar amount currently made to your jurisdiction, e.g., Direct \$15,000.00, SSA \$2,000.00. Click on the **award type** you wish to work with.
5. Displayed at the top of the next page you will see the award type that was selected and the total amount for this jurisdiction to be allocated. Below these boxes is a listing of all LROs in your jurisdiction which have received funds in the past, plus a button labeled “New LRO”.
6. Begin the allocation process by clicking the LRO to which you want to allocate funds. You may see a message regarding java scripts, click on “Accept” if you do.
7. On the next page, you will be able to edit and update all the existing information for this LRO.
8. Immediately below the LRO’s address and contact information, the amount of your jurisdiction’s award is shown above the spending categories. Enter **WHOLE DOLLARS AMOUNTS ONLY** in the column next to the category for which this LRO has requested funding (e.g., Mass Shelter 5000, Utilities 3000) then enter the total dollar amounts for this LRO in the **Total** box, (e.g., 8000). Then click on the button labeled “**Save this information**”.
9. If you have entered the amounts and total correctly, a message reviewing your allocation is displayed. With this successful entry, click on the button “**Return to LRO Selection**” at the bottom of the page.
10. If you have made an error in this entry, you will see a message indicating the error in your process (e.g., “You cannot allocate less than \$300 to a single LRO!”, or “Please enter only whole dollar amounts!”, or “The total does not match the sum of the category amounts!”). Use the **BACK** button on your browser to return to this allocation page to make the necessary corrections, and then click the button labeled “**Save this information**”.
11. Continue selecting and processing each LRO in the same manner, repeating steps 7 through 11. After allocating funds to each LRO, the “Amount Allocated” and “Amount Remaining” box is updated to reflect the total of the current allocation.
12. If you need to add a new LRO, click on the “**New LRO**” button and follow steps 7 through 11 ensuring that all the LRO contact information is completed.
13. When you have allocated your entire award, complete the Local Board information which follows the listing of LROs.
14. You may print the entire plan by clicking on the button labeled “**Print LRO Plan**” at the bottom of the page.
15. When all information has been completed and the Total Remaining equals \$0.00, a button labeled “**File this Board Plan with EFSP**”, near the bottom of the page will be activated. **Click this button to submit your plan to EFSP**. An email will be sent to EFSP notifying your Regional Manager that you have submitted your plan.
16. **You must still mail to the National Board (1) your SIGNED Local Board signature page, (2) your Local Board Roster pages, and (3) any required Lobbying Certification forms that have been signed by the LRO representative.**
17. **Once you have submitted your Local Board plan, changes can only be made via reallocation forms sent to the National Board.**

NOTE: The plan does not have to be completed at one time. Once you have entered and saved the information for an LRO, you can leave the process and web site, and resume entering the rest of the plan at a later date.