ADDITIONAL INFORMATION

FINANCIAL WELLBEING AND CAPABILITY (FWC) ACTIVITY

EMERGENCY RELIEF (ER) AND FOOD RELIEF - TIMEFRAME (AS AT 12 NOVEMBER 2018)

Deliverable	Actual Date	Brief number
FWC grant recipients notified of 12-month funding agreement extension to 30 June 2018 to allow for consultation on future of FWC Activity.	December 2016	MS16-000820
Department released a discussion paper, 'Future Directions of the Financial Wellbeing and Capability Activity' through engage.gov.au.	February 2017	
s34		
Minister Porter and Minister Tudge commissioned a review of Commonwealth funded financial management services which included Financial Wellbeing and Capability Activity	September 2017	
Interim report on review of Commonwealth funded financial management services provided to Ministers Porter and Tudge	4 December 2017	MS17-001934
Minister Porter wrote to the former Prime Minister Turnbull seeking authority to extend FWC funding agreements until 31 December 2018 to allow the FWC Activity redesign to be completed.	7 December 2017	MS17-001972
The former Prime Minister Turnbull responded to Minister Tehan agreeing to extend FWC funding agreements to 31 December 2018 with no further extension.	22 December 2017	MC17-111617
FWC grant recipients informed of 6-month extension to 31 December 2018.	January 2018	
Consultations with organisations and peak bodies on FWC future directions, including redesign, concluded.	February 2018	
Department of Finance and Attorney-General's Department agree to proposed FWC Activity redesign.	8 May 2018	
Forecast opportunity and factsheet published on Grants.gov.au advising of upcoming FWC grant round.	17 May 2018	

FOI 18/19-056 Item 1 Document 1

For Official Use Only

Deliverable	Actual Date	Brief number	
Redesign of FWC Activity, including ER, agreed by Minister Tehan.	22 May 2018	MS18-000778	
Noting interim report on review of Commonwealth funded financial management services agreed to send Joint letter to Prime Minister	27 May 2018	MS18-000750	
The Federal Executive Council agree to amend the Financial Framework (Supplementary Powers) Regulations to provide the legislative basis for the redesigned FWC activity.	21 June 2018		
Grant Opportunity Guidelines for ER and Food Relief approved by Minister Tehan.	22 June 2018	MS18-000957 MS18-001016	
Process for conducting FWC grants rounds (restricted/open) approved by Minister Tehan.	26 June 2018	MS18-000575	
Grant Opportunity Guidelines for ER and Food Relief agreed for release by the Minister for Finance.	29 June 2018	MS18-001033	
Letter sent to Prime Minister seeking agreement that the outcomes of the Review be addressed through existing programs of work, rather than requiring a return to Cabinet	30 June 2018	MS18-001013	
Grant Round Management Plan signed.	12 July 2018		
Grant Round Opens	12 July 2018		
Cabinet Secretary agrees on behalf of Prime Minister that the Review of Financial Management Services no longer needs to be brought forward to Cabinet	9 August 2018	MC18-091046	
Grant Round Closes.	22 August 2018		
Pre Assessment including eligibility and compliance checks.	23 August – 6 September 2018		
Information brief provided to Minister Fletcher advising of the tight turnaround required to complete the Financial Wellbeing and Capability Activity before January 2019	11 September 2018	MB18-001041	
Applications assessed and moderated.	7 - 21 September 2018		
Expert Panel Meeting convened	24 - 26 September 2018 / 3 October 2018		

FOI 18/19-056 Item 1 Document 1

For Official Use Only

Deliverable	Actual Date	Brief number
Expert Panel ER and Food Relief Report finalised and cleared by Panel members.	4 -12 October 2018	
Final ER and Food Relief Assessment Report approved and provided to Program Area.	15 October 2018	
Outcomes of ER and Food Relief grant rounds provided to Minister Fletcher with critical date of 5 November 2019	19 October	MS18-001679
Spending Minute signed by departmental delegate.	8 November 2019	

FINANCIAL WELLBEING AND CAPABILITY (FWC) ACTIVITY - TIMEFRAME (WORKING AS AT 7 NOVEMBER 2018)

Deliverable	Actual Date
FWC grant recipients notified of 12-month funding agreement extension to 30 June 2018 to allow for consultation on future of FWC Activity.	December 2016
Department released a discussion paper, 'Future Directions of the Financial Wellbeing and Capability Activity' through engage.gov.au.	February 2017
s34	
Minister Porter wrote to the former Prime Minister Turnbull seeking authority to extend FWC funding agreements until 31 December 2018 to allow the FWC Activity redesign to be completed.	7 December 2017
The former Prime Minister Turnbull responded to Minister Tehan agreeing to extend FWC funding agreements to 31 December 2018 with no further extension.	22 December 2017
FWC grant recipients informed of 6-month extension to 31 December 2018.	January 2018
Consultations with organisations and peak bodies on FWC future directions, including redesign, concluded.	February 2018
Department of Finance and Attorney-General's Department agree to proposed FWC Activity redesign.	8 May 2018
Forecast opportunity and factsheet published on Grants.gov.au advising of upcoming FWC grant round.	17 May 2018
Redesign of FWC Activity, including ER, agreed by Minister Tehan.	22 May 2018
The Federal Executive Council agree to amend the Financial Framework (Supplementary Powers) Regulations to provide the legislative basis for the redesigned FWC activity.	21 June 2018
Grant Opportunity Guidelines for ER approved by Minister Tehan.	22 June 2018
Process for conducting FWC grants rounds (restricted/open) approved by Minister Tehan.	26 June 2018
Grant Opportunity Guidelines for ER agreed for release by the Minister for Finance.	29 June 2018
Letter sent to current providers (including a factsheet) advising of the redesign and grants rounds.	11 July 2018
Grant Round Management Plan signed.	12 July 2018
Grant Round Opens.	12 July 2018

Deliverable	Actual Date
Grant Round Closes.	22 August 2018
Pre Assessment including eligibility and compliance checks.	23 August – 6 September 2018
Applications assessed and moderated.	7 - 21 September 2018
Expert Panel Meeting convened	24 - 26 September 2018 / 3 October 2018
Expert Panel ER and Food Relief Report finalised and cleared by Panel members.	4 -12 October 2018
Final ER and Food Relief Assessment Report approved and provided to Program Area.	15 October 2018
Outcomes of ER and Food Relief grant rounds provided to Minister Fletcher with critical date of 5 November 2019 (MS18-001679).	19 October
Spending Minute signed by departmental delegate (subject to MS18-001679).	5 November 2019
Outcome Notifications Issued.	8 - 14 November 2018
Finalise Agreements.	8 - 12 November 2018
Data Entry.	13 - 22 November 2018
Issue Agreements.	23 – 29 November 2018
10 day Negotiation.	30 November - 13 December 2018
Agreements Executed.	14 – 20 December 2018







Attachment A

Restricted Rounds

Selection Phase		Initial Dates	Revised Dates
Client training of assessors / moderators	Community Grants Hub / Client Agency	26 July to 8 August 2018	Complete
Applications assessed and moderated	Community Grants Hub	27 August 2018	Complete
Shell agreements approved	Client Agency	10 September 2018	Complete
Assessment Report drafted and approved	Community Grants Hub	30 August 2018	Complete
Delegate approval of Grant Round outcomes (including consultation with the Minister's Office)	Client Agency	31 August to 13 September 2018	31 August to 25 September 2018
Nomination of five staff to be trained to assist the Transitions Team in the Establish Phase	Client Agency	13 September 2018	13 September 2018
Additional Task – Script for Funding Arrangement Managers to contact successful applicants approved and provided to the Hub	Client Agency		21 September 2018 Complete
Additional Task - Funding Arrangement Managers to contact successful applicants regarding pro-rata funding	Community Grants Hub		26 - 28 September 2018
Successful notifications issued	Community Grants Hub	19 September 2018	28 September to 3 October 2018

Establishment Phase This is on the basis that Providers return signed Agreements within 20 business days, rather than the 30 business days that is usually allocated.		Initial Dates	Revised Dates
Agreements issued in line with endorsed plan provided by Agreement	Community Grants Hub	10 October 2018	19 - 25 October 2018
Creation Team			
Agreements negotiated and executed	Community Grants Hub	14 November 2018	29 November 2018







Attachment A

	CFCF&FC and FCH	Emergency Relief and Food Relief
Ministerial sign off	22 October 2018	5 November 2018
We note the client is hoping to have the delegate sign off	previously planned 17 October	previously planned 29 October
earlier, but that has not been our previous experience		
Delegate sign off	23 October 2018	6 November 2018
Calls to successful applicants and unsuccessful providers	23 October -26 October 2018	
(Client)		
Provision of Script for complaints fielded by the Transitions	1 November 2018	1 November 2018 assuming we can use the same
Team & the Hotline		script for both?
Outcome Notifications Issued (by Hub)	26 October – 1 November 2018	8 - 14 November 2018
Finalise Agreements	30 October – 1 November 2018	23 - 12 November 2018
Data Entry	2 – 13 November 2018	13 - 22 November 2018
Issue Agreements	14 – 20 November 2018	23 – 29 November 2018
10 day Negotiation	21 November - 4 December 2018	30 November - 13 December 2018
Agreements Executed	5 – 11 December 2018	14 – 20 December 2018
	Contingent on the grant recipient returning	Contingent on the grant recipient returning their
	their signed agreement by 4 December 2018	signed agreement by 13 December 2018





Standard Operating Procedures Open Funding Rounds

FOI 18/19-056

Item 4 Document 1

......

August 2016

Process Map:



Introduction

+++

This Introductory Standard Operating Procedure (SOP) features the key phases and processes that must be managed during an Open Funding Round Selection Process. Where appropriate, links are provided to lower level SOPs that explain the process(es) in more detail.

1. Engagement with Account Management

+++++

+++++

++

+++

- 2. Notification of new funding round
- 3. Setting up a new funding round
- 4. Assessment preparation
- 5. Round opens
- 6. Round closes
- 7. Pre-assessment
- 8. Assessment
- 9. Pre-selection
- 10. Recommendation
- 11. Decision
- 12. Finalise

Steps	Task
Step 1	Engagement with Account Management During the design and planning phase of any funding round, the Assessment Centre should be engaged with Account Management The discussions should include: The appropriate selection process Scheduling and timeframes Assessment Centre resourcing Governance – Expert Panel format Input to Funding Round Summary (and Application Form if necessary) Ministerial announcement
Step 2	Notification of a new funding round This process is carried out whenever a new funding round is going to open. The Selection Mailbox receives the Tracker ID and then the Selection Process Pack is received prior to the funding round opening. Refer to SOP – Selection Mailbox
Step 3	Setting up a new funding round in FOFMS Once the Assessment Centre has received confirmation that a funding round is opening: • Set up funding round in FOFMS • Assign the funding round to an Assessment Team • Set up the Assessment Team as Funding Round Managers Refer to Taskcard – Adding Staff to a Funding Round
Step 4	Assessment preparation The Assessment Centre is responsible for preparing internal documentation which outlines the strategy for managing the selection process and supports the assessment process. The following documents are drafted: • Selection Strategy • Assessment Matrix Refer to SOP – Preparing Assessment Documentation
Step 5	Round opens

Steps	Task
	The application period is usually 6 weeks but can be shorter. During this period, the Grant Support team manages the majority of queries from applicants but some communication will be managed by the Assessment Centre through the Selections Mailbox.
	The Assessment Centre will also:
	finalise the Selection Strategy
	finalise the Assessment Matrix
	finalise the Assessment tool
	 finalise resources, Task cards and Workbooks
	Confirm training schedule and requirements
	Engage and train assessors and moderators
	Refer to SOP – Selection Mailbox
	Refer to SOP – Preparing Assessment Documentation
	Refer to SOP – Expert Panel – Formal
	Refer to SOP – Training
Step 6	Round closes (all of the following steps may not be necessary once the new application process has been confirmed
	Once the funding round closes, no more applications can be submitted and the final number of applications can be determined
	Finalise number of applications submitted
	Acknowledge late applications submitted
	Ensure all applications are loaded into FOFMS (manual apps etc)
	Review Assessment Centre resourcing based on the final number of applications
	Create Evaluation Teams in FOFMS
	Refer to SOP – Selection Mailbox
	Refer to SOP – Applications received – Master
	Refer to Taskcard - Submitting an emailed application using a Smart Form
	Refer to Taskcard - Submitting a paper application using a Smart Form
	Refer to Taskcard - Manually entering applications for Direct funding rounds
	Refer to SOP – Late Applications
	Refer to Taskcard – Creating an Evaluation Team
	Refer to Taskcard – Adding staff to an Evaluation Team
Step 7	Pre-assessment
	During the pre-assessment phase, all applications are thoroughly checked and prepared for assessment:-
	Prepare Master Report – all applications received
	Identify duplicate applications
	 Undertake organisation eligibility and compliance checks

+++ + ++

+++

+++++++++++

+

- Arrange for initial vendor checks (if required)
- Undertake grant eligibility checks (if applicable)
- Prepare Minutes for clearance (e.g. duplicate apps, late apps)
- Initial FOFMS reconciliation
- Finalise Master Report all applications to be assessed

Refer to SOP – Selection Mailbox Refer to SOP - Eligibility and Compliance Refer to SOP – Duplicates and Similar Applications Refer to SOP – Applications received – Master Refer to SOP - Reconciliation

Step 8 Assessment Once the list of eligible applications has been finalised, the applications can be allocated to assessors commence: Allocate applications to assessors Assess applications OA review of applications OA review of applications Assess applications OA review of applications Applicant Capacity Risk Assessments (to be confirmed) Refer to FOFMS Task Card – Assessing Applications Refer to FOFMS Task Card – Applications Re-assessment - Partial Refer to FOFMS Task Card – Applications Re-assessment - Full Refer to FOFMS Task Card – Applications Re-assessment - Full Refer to FOFMS Task Card – Acplications Re-assessment - Full Refer to SOP – Applicant Capacity Risk Assessment (to be confirmed) Step 9 Pre-selection Once all applications have been fully assessed, QA reviewed and moderated, applicants can be shortlisted for consideration by the Expert Panel: Extract Tier 2 Report from FOFMS Shortlist applicants suitable for funding Undertake financial viability on shortlisted applicants Arrange for final vendor check on shortlisted applicants Prepare and distribute draft Expert Panel Report Finalise Expert Panel meeting details and requirements Prepare and distribute draft Expert Panel Report Finalise Expert Panel Meeting Prepare and distribute draft Expert Panel Report Finalise Expert Panel Report Refer to SOP - Applications Received – Mast	Steps	Task
Refer to SOP – Applicant Capacity Risk Assessment (to be confirmed) Step 9 Pre-selection Once all applications have been fully assessed, QA reviewed and moderated, applicants can be shortlisted for consideration by the Expert Panel:- Extract Tier 2 Report from FOFMS Shortlist applicants suitable for funding Undertake financial viability on shortlisted applicants Arrange for final vendor check on shortlisted applicants Prepare and distribute draft Expert Panel Report Finalise Expert Panel meeting details and requirements Prepare draft Assessment Report Refer to SOP – Applications Received – Master Refer to SOP – Preparing the Expert Panel Report Refer to SOP – Preparing the Expert Panel Report	Step 8	Assessment Once the list of eligible applications has been finalised, the applications can be allocated to assessors and assessment can commence:- • Allocate applications to assessors • Alsess applications • QA review of applications • Moderate assessments • Applicant Capacity Risk Assessments (to be confirmed) Refer to FOFMS Task Card – Assessing Applications Refer to FOFMS Task Card – Applications Re-assessment - Partial Refer to FOFMS Task Card – Applications Re-assessment - Full Refer to FOFMS Task Card – Moderation of Assessments Refer to FOFMS Task Card – Moderation of Assessments Refer to FOFMS Task Card – QA Review
Refer to SOP – Financial Viability Analysis	Step 9	Pre- selection Once all applications have been fully assessed, QA reviewed and moderated, applicants can be shortlisted for consideration by the Expert Panel:- • Extract Tier 2 Report from FOFMS • Shortlist applicants suitable for funding • Undertake financial viability on shortlisted applicants • Arrange for final vendor check on shortlisted applicants • Prepare and distribute draft Expert Panel Report • Finalise Expert Panel meeting details and requirements • Prepare draft Assessment Report Refer to SOP - Applications Received - Master Refer to SOP - Preparing the Expert Panel Report Refer to SOP - Preparing the Assessment Report and Spending Minute Refer to SOP - Preparing the Assessment Report and Spending Minute Refer to SOP - Financial Viability Analysis

- Expert Panel report updated with applicants recommended to fund, amount of funding to be offered and any • conditions of funding
- Finalise the Expert Panel Report and include/attach details to the Assessment Report
- Finalise the Assessment Report for approval by the Assessment Controller
- Once the Assessment Report has been approved, undertake primary FOFMS reconciliation to reflect the recommendations

Refer to SOP - Expert Panel - Formal

Refer to SOP - Expert Panel - Informal

Refer to SOP - Preparing the Expert Panel Report

Refer to SOP - Preparing the Assessment Report and Spending Minute

Refer to SOP - Reconciliation

Decision

Once the outcome of the Expert Panel meeting is known the recommendations can be forwarded to the Delegate for a decision. The Delegate can overturn the recommendations but will need to provide justification for doing so:-

**************	***************	*************	***************
************	****************	*************	*************
*************	***************	*************	***************
************	****************	*************	*************
and the star star star star star star star star	**********	*************	****
*************		*************	***************

Steps	Task
	Draft the Spending Minute for approval by the Delegate
	Forward the draft Spending Minute and approved Assessment Report to the Delegate
	Spending Minute is signed off by the Delegate
	Refer to SOP – Preparing the Assessment Report and Spending Minute
	Finalise
	When the Delegate has made their decision, there are a number of steps to finalise the selection process:-
	 Undertake final reconciliation of FOFMS to reflect the decision of the Delegate
	Provide documentation for Delivery handover
	Notify applicants of the selection outcome
	Provide applicant feedback
	Provide successful applications for the Grant Agreement Managers (GAMS)
	Provide documentation for Agency handover
	Undertake FOFMS post-reconciliation QA of the funding round
	Undertake Post Implementation Review
	Refer to SOP - Notification for Applicants
	Refer to SOP – Providing Feedback to Applicants
	Refer to SOP – Reconciliation

6 | Community Grants Hub





Standard Operating Procedure Assessment Documentation

FOI 18/19-056

Item 4 Document 2

* * * * * *

November 2016



This Standard Operating Procedure explains how to:

- 1. draft the Assessment Matrix
- 2. draft the Shell Assessment Tool
- 3. draft individual Assessment Tools for each application.

Assessment Matrix

The Assessment Matrix is a six-point (0-5) rating scale used by assessors to appraise each application against the nominated selection criteria, with each score corresponding to a quality rating and rating description.

Assessment Tool

The Assessment Tool is a word document in which Assessors record the outcomes of application assessments before entering them in FOFMS.

The Assessment Tool may also be used to record additional details captured through assessment and requested by Policy for inclusion in the Expert Panel Report. Information that can be extracted directly from FOFMS (i.e. responses to specific questions in the Application Form) does not need to be captured in the Assessment Tool.

For high-volume rounds, the Open and Restricted Team creates a shell Assessment Tool, which is then used by the Assessment Centre Support Team (ACFOFMS) to create individual Assessment Tools for each application after the application period has closed. For low-volume rounds, the Tools are created by a member of the Open and Restricted Team.

Draft	Ass	essn	nent	Matrix
-------	-----	------	------	--------

1 Open either of the Assessment Matrix templates: Template 1: ARC Document number D16/7791721 Template 2: ARC Document number D16/8620464

Save a copy in the relevant ARC funding round folder structure under Assessment \rightarrow Assessment of Applications.

- 3 Complete the saved template. To do so, you will require the relevant Funding Round Summary located in the ARC funding round folder structure under Products → Funding Round Documents and/or on the relevant page of the <u>Community Grants Hub</u> website.
- 3 Send an email to the Funding Round Team Leader with a link to the Assessment Matrix for review.
- 4 Action any suggested changes and notify the Funding Round Team Leader once complete. Alternatively, if the changes are minor, the Funding Round Team Leader may action them independently.
- 5 Once approved by the Funding Round Team Leader, the Assessment Matrix is sent to the relevant Policy area (for information only) attached to email template no. 3 in ARC document D16/7538081. Email template no.3 also asks Policy to provide information about the contents of the Expert Panel Report, and to nominate a date for delivery of policy training to Assessment Centre staff seek approval from Funding Round Team Leader before sending.

******** ++ . --4 4 4 4 + ÷ 4 1 -

	Draft Shell Assessment Tool (high-volume rounds)
6	Open the Assessment Tool template – ARC Document D16/7791259.
	Save a copy of the template in the relevant ARC funding round folder structure under Assessment \rightarrow Assessment of Applications.
7	Navigate to Assessment \rightarrow Communication in the relevant ARC funding round folder structure and locate Policy's response to email template no.3 advising of additional information to be captured in the Expert Panel Report.
	Identify which additional information cannot be extracted directly from FOFMS and will therefore need to be captured by assessors in the Assessment Tool; extra fields will need to be added to the Tool accordingly.
8	Populate the saved copy of the template with the funding round details and add any additional fields required.
	Notify the Assessment Team Leader or Funding Round Manager once complete and action any suggested amendments.
q	Draft and send an email using template no. 6 in ARC Document D16/7538081 advising

9 Draft and send an email using template no. 6 in ARC Document D16/7538081 advising ACFOFMS that the shell Assessment Tool is complete and ready for use once the funding round closes.

Create individual assessment tools for each application (low-volume rounds)

- 10 After the application period has closed, open a copy of the Applications Received spreadsheet located in the relevant ARC funding round folder structure under Pre-Assessment → Quality Assurance.
- 11 Open the Assessment Tool template ARC Document D16/7791259.
- 12 Save a copy of the Assessment Tool template for each application received in the relevant ARC funding round folder structure under Assessment → Assessment of Applications with the naming convention Funding Round Number Funding Round Name Assessment Tool Name of Applicant Organisation.
- 13 Populate and save the Assessment Tools with the details of the funding round and of each application per the Applications Received spreadsheet.







FOFMS TASKCARD

Assessing Applications

This task card will take an Assessor through the process of entering and completing an application assessment in FOFMS.

Contents

Page

Open the Application Record	2
Assess the Application	9
Enter the Completed Assessment into FOFMS	11
Logging Out of FOFMS	21
Need Help?	21

Before you begin ensure you have:

• The FOFMS ID of the Application you will be assessing.

FOFMS Access Required:

• FOFMS Application Appraiser

*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.

Update Instructions For Each Funding Round

• Update Step 15 with the appropriate ARC Folder details

Open the Application Record

Step	Action		
1	Open FOFMS to access the Application Record		
2	Click on the Funding Rounds tab. Click on the Applications link.		
	ORACLE File Edit View Navigate Query Tools Help		
	Application:		
	Home Programs Organisations Funding Rounds Funding Agreements		
	Applications All Funding Rounds My Managed Funding Rounds Registration		
	My Entered Applications		
	Id Program Name Funding Round I Financial Period Number Submission		

Step	Action
3	Click on the drop down menu Select My Evaluation Team's Applications.
	Home Programs Organisations Funding Rounds Funding A
	Applications All Funding Rounds My Managed Funding Rounds
	My Entered Applications
	Id Program Name Funding Round I Financial Period Number
	Home Programs Organisations Funding Rounds Fundi
	Applications All Funding Rounds My Managed Funding Roun
	My Evaluation Teams Applications V
	✓
	d Program Name Funding Round Financial Period Number
<i>z</i>	s47E 2016-2017
4	Click on the drop down menu. Select Id.
	Home Programs Organisations Funding Rounds Funding Agreem
	Applications All Funding Rounds My Managed Funding Rounds Regi
	My Evaluation Teams Applications V
	✓
	Id And Financial Period Number Su
	Funding Round Name
	Financial Period ^s i 2016-2017 21

Step	Action
5	Enter the Application Id in the next field. Click 📀.
	Home Programs Organisations Funding Rounds Funding
	Applications All Funding Rounds My Managed Funding Rounds
	My Evaluation Teams Applications V
	Id ✓ \$47E
	Id Program Name Funding Round Financial Period Number
6	The application record will open.
	Home Programs Organisations Funding Rounds Funding Agreemen
	Applications All Funding Rounds My Managed Funding Rounds Registr
	My Evaluation Teams Applications V
	Id Program Name Funding Round Name Financial Period
	s47E s47E 2016-2017

Step	Action	
7	A FOFMS application Click on the Status dro selected).	record will appear. In down menu and select Under Assessment (this may already be
	Home Programs Organisations Funding Rounds	Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Contacts Child Care User Preferences
	Applications All Funding Rounds My Managed Fundi	g Rounds Registrations DOI Funding Rounds Administration
	S47E	
		Appraisai Details
		Primary Contact: S4/E Evaluation Team (Assessment Team 3) Funding Round Phase Open/Apprave
	Program Name + 547E	Funding applied For \$4/E Compliant Ves Status - Under Assessment
	Punding Hound Name + 54/E au	Heconomeneo running 547E signine ves a sub setura + Appraidal
	Registration to S4/E	Processperiors approaches and a scotte
	Pinancial Year. 2010-2017	Place/Service Barrier P
	Number	Apprisedon Sante Pisari 👘 nariang Ul – unites Apprisedon 🕾 –
	Beneticed Date 24/01/2017 01:23:31 PM	Let expression for the constant of the second stress of the second stres
	Funding Round Type	Such assicility of a transmission of the formation of the
	Andication Submission Reference S47F	
	Status Details	
	Funding Round Phase:	Open/Appraise
	Status:*	Under Assessment 💙
	Sub Status *	Appraisal 💙
8	Click on the Sub Status	drop down menu and select Appraisal (this may already be selected).
	Status Details	
	Funding Round Phase:	Open/Appraise
	Status ★	Under Assessment 🗸
	Sub Status:*	Appraisal 💙

Step	Action
9	Save the record using Ctrl+S or click the drop down and select Save Record.
	Apprication Decision Id & \$47E Primary Contact \$47E Exaduaria A salined Car \$47F Primary Contact \$47F Primary Con
	+ Q I of 1+ Status Undo Record [Ctrl+U] Delete Record [Ctrl+D] New Record [Ctrl+N] Copy Record [Ctrl+B] Save Record [Ctrl+S] Statu New Query [Alt+Q] Run Query [Alt+ENTER]

40	Action			
10	Click on the Attachments	s tab.		
	Note: If you cannot view t	he Attachments tab, selec	et Attachments from t	he drop down list.
	Kome Programs Organisations Funding Rounds Fun Applications All Funding Rounds My Managed Funding Rou	ding Agreements Milestones: Rayments Reviews Su Inds Registrations <u>DOI Funding Ro</u> unds Administration	mmanes Geo Spatial Actions Literature Cont	acts Child Care User Preferences
	Program Name + S47E	Funding Applied For \$47E	Compliant Yes	Status + Under Assessment
	Funding Round Name + S47E	Recommended Funding S47E	Eligible: Yes	V Sub Status Appraisal V
	Registration Id S47E S Place	es/Services Applied For	Score 8	Status Change Date + 10/02/2017
	Financial Year 2016-2017	Recommended Places/Services	Banding: 1	Shortlisted.
	Number	Application State NSW	Ranking: QP	Check Application:
	Submission Date 24/01/2017 01:21:31 PM	Late Application On Time	QA Review 🗹 🛛 Fu	nding Round Defaults Checked.
	Received Date + 24/01/2017	Submission Type 🖌 Cinline - External HTML		Minute Generated
	Funding Round Type 🔷 🔸	Number of Attachments 3		Minute/Ref Number
	Application Submission Reference s47E			
)rganisation Details	Depa	artmental Contacts	SACS Details
	Legal Entity Id S47E	Provider Id S47E	Last Name S47E	SACS Approval + Not Applicable
	Land Entity Nama SATE	Provider Name c47E	First Name S47E	Legal Entity SACS Award NSW
	Logal Entry Address CATE	Buttane Mana SATE	Phone s47E	Submitted SACS Award
			Email Address s47E	Override SACS Award
	Legal Entity Status Active Bu	Siness Name from ABR 😒	r Applications	SACS Award Override Details
	ABN S47E	Provider Address S47E	For the Country of the Country Decard, M	Care Avende Desertant
	Legsl Encity Matched	Provider Status Active Another App	ecation Exists in this Funding Hound	SAUS Overnee Date/ nme
	Legal Entity Blocked For New Agreements	Provider Matching Result	en Exists in Different Funding Round Y	SACS Override By
	Application Items ABR Details	- Legal Entity Application Descri	ption	
	Application Items ABR Details	- Legal Entity Application Descri	tion	Log

Step	Action				
11	Click on the Recei	pt hyperlink to open a cop	y of the Applica	ation Form.	
	Compliance Crite	eria Eligibility Criteria	Appraisals	Grant Agreement	Information
	Attachmer	nts		_	
		~	(€	
	Attachments Na Doo	cument Type Size(In Bytes)	Туре	Modified Lo	ocal
	s47E App	plication Form11,042	xlsx	24/01/2017 01:	Y
	Receipt	375,404	pdf	24/01/2017 01:	Y
	This may also apport	ear as DSS Standard For Release 2	m Release 2.		
12	if required, open of	ther attachments by select	ing the approp	riate nyperlink.	
13	The following box w File Download You are downloading the like to edit the file direct computer? Edit button is disabled as Desktop Integration Siebe	will open. Click Download, d X e file 'Receipt.pdf'. Would you tly or download it to your Siebel was not able to connect to e Agent. dit Download Cancel	, then Open .		
	Do you want to open or save	Receipt.pdf from dssgrants.gateway.internal?		Open Save	Cancel X

Assess the Application

eps	Actions	
14	Open ARC to access the Assessment Tool and the Assessment Matrix by cli	licking on User Labe
	HP Records Manager Elle Edit View Search Toolt Administration Window Help Q Q Eind Records Refine Search Terrets Terrets Terrets Terrets Terrets Shartcuts x	
	Favorities Imit Records Title Word Imit and 2017-933 Imit and the seconds Imit Records - I Records found - I Records f	
	Records Image: Specific Scheder out Image: Specific Scheder out Image: Speci	94
	Tage I Conditioned Tag KWILG-Access	RCO II PROD_EDRMS_WG
	Double-click your appropriate Assessor folder. NOTE: If your User Labels are not set up, please speak with your Team	Leader.
	E ESE Yan Saveh Leek Administration Window Help C R R O R O R O R O R O R O R O R O R O	
	Search For Search By Matching ortena Swottee Bit Accords • Title Word • al. 2017-933	
	Becotis Becotis Tanuné T Recot hourid My Contrines Use Label Name Ny Contrines Image: A DE Messation Sande Sandes Image: A DE Messation Sande Sandes Image: A DE Messation Use Label Name Image: A DE Messation Image: A DE Messation Image: A D	
	Peart Receil Namber 15 10/15/4209	

Steps	Actions					
15	Open the folder to access the Assessment Matrix and Assessment Tool.					
	Sind Security Dispersion Research Control Cont					
	products, inside search refersion series second guidenties in call of the inside the inside the second seco					
		▼ 100				
	Records - label:NUCLAssessors - 1 Record found	Date Created				
	The second secon	5/09/2016 at 4:34 PM				
	C 01/1331 2016-715 - NDCl 2017-18 - Assessment Matrix	6/01/2017 at 1:57 PM				
	My Containers D17/12493 2016-715 • NDCI 2017-18 • Assessment Tool	6/01/2017 at 11:31 AM				
	S4/E					
	Recent Documents					
	Saved Searches					
	User Labels					
	Uocuments checked					
16	Undertake the assessment using:					
	 the Application Form 					
	- the Assessment Tool					
	the Accessment Metrix					
	 any required attachments. 					

Enter the Completed Assessment into FOFMS

Steps	Actions		
17	Open the completed As Open corresponding Ap	sessment Tool in ARC. plication Record in FOFMS.	
18	Click on the Appraisals Scroll down to the Base Home Programs Organisations Applications All Funding Rounds M Application Details Id * \$47E Program Name * \$47E Funding Round Name * \$47E Registration Id \$47E	tab. line Appraisal record. -unding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions y Managed Funding Rounds Registrations DOI Funding Rounds Administration y Managed Funding Rounds Registrations DOI Funding Rounds Administration Primary Contact \$47E Funding Applied For \$47E Recommended Funding \$47E Places/Services Applied For \$67E Places/Services Applied For \$67E P	st et
	Financial Year 2016-201 Number Submission Date 24/01/20 Received Date 24/01/20 Funding Round Type Application Submission Reference \$47E	Recommended Places/Services Application State Application State NSW TO1:21:31 PM Late Application On Time QA Review: Submission Type * Online - External HTML Number of Attachments	P
	Organisation Details Legal Entity Id \$47E Legal Entity Name \$47E Legal Entity Address \$47E Legal Entity Address \$47E Legal Entity Status Active ABN \$47E Legal Entity Blocked For New Agreements	Departmental Contacts Provider Id \$47E Provider Name \$47E Business Name \$47E Business Name \$47E Provider Name \$47E Business Name \$47E Provider Address \$47E Provider Address \$47E Provider Address \$47E Provider Status Active Another Application Exists in Different Funding Round N Another Application Exists in Different Funding Round Y	17 7 2 7
	Current Agreement Exists Compliance Criteria Eligibility Criteria	Provider Blocked For New Agreements. Appraisals rant Agreement Information Agreement Information Application Financials Application Items Iigibility Criteria Appraisals Grant Agreement Information Agreement Ir Geo	n
	Use as Final Appraisal Typ	De Appraiser Last N Appraiser First N Status Score Banding Administrator s47E Baseline	

Actions
Highlight the Baseline Appraisal Record.
Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Informat
Appraisals
Lice as Final Approical Type Approicar List N Approicar First N Statue Score Banding
Assessment Administrator ^{\$47E} Baseline
Assessment Administrator Basenne
Click and select Copy Record.
ABR Details – Legal Entity ABR Details – Provider Accreditations
+ Q ✿ 2-4 of 4 ₽
Undo Record [C <mark>.</mark> rl+U]
Delete Record Ctrl+D]
New Record [Strl+N]
Copy Record [Ctrl+B]
Save Record [Ctrl+S]
New Query [Alt+Q]
Run Query [Alt+ENTER]
A new assessment line will appear.
LICK USE as Final.
Compliance Criteria Engloling Criteria Appraisais Grant Agreement Information Agreement information Applicat
Appraisals
Use as Final Appraisal Type Appraiser Last N Appraiser First N Status Score Banding
Assessment Administrator ^{\$47E} Baseline

Steps	Actions				
22	From the Appraisa raisals	I Type drop down menu	select Assessme	nt.	
	nal Appraisal Ty	pe Appraiser Last N Appr	raiser First N Status Not Sta	Sci	
	Assessm	ent dministrator ^{s47E}	Baselin	e	
23	In the Appraiser L	.ast Name field, click the	e glyph		
	isals				
	~	1997 1997 10 ALAND 1997	•		
	Appraisal Type	Appraiser Last Name Ap	praiser First Name	Status	
	Assessment	٩		Not Started	
	Assessment	Administrator \$47E		Baseline	

Steps	Actions
24	A pop up box will open. Highlight your name. Click OK .
	Pick Employee
	Q Last Name ✓ → 1 - 10 of 10+
	Last Name First Name Login Position Job Title
	s47E FaCS App
	M Previous Page 44 Previous Record Next Record M Next Page
	OK
25	Change the Status to In Progress.
	aisals
	✓
	Appraisal Type Appraiser Last N Appraiser First N Status Score
	Assessment Started X
	Assessment Administrator

Steps	Actions
26	Save the record using Ctrl+S or click the Home Programs Organisations Funding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Contacts Child Care User Preferer Applications All Funding Rounds My Managed Funding Rounds Registrations DDI Funding Rounds Administration SATE Appressed Summaries Geo Spatial Actions Literature Contacts Child Care User Preferer Applications versus is sATE Primary Contacts SATE Primary Contacts SATE Primary Contacts SATE Primary Contacts SATE Evaluation Team Assessment Team Internet SATE Primary Contacts SATE
	 + Q I of 1+ Status Undo Record [Ctrl+U] Delete Record [Ctrl+D] Fundi Fundi New Record [Ctrl+N] Copy Record [Ctrl+B] Save Record [Ctrl+S] Statu Save Record [Ctrl+S] Statu New Query [Alt+Q] Run Query [Alt+ENTER]
27	Highlight the appraisal record ticked as Use as Final and the status as In Progress. Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Appraisals ✓ ✓ ✓ ✓ Use as Final Appraisal Type Appraiser First Name Status Score Banding ✓ ✓ In Progress ✓ ✓ ✓ ✓
28	Scroll down to the Selection Criteria List. Assessment Administrator Siebel Baseline ** Assessment s47E In Progress ** Selection Criteria List ** Selection Criteria List ** Selection Criteria List ** Criteria Guidelines Assessment re 2 Criterion 2 - How Selection Criteria Assessment re 3 Criterion 3 -

Steps	Actions						
29	For each of down mer	criterion ente 1 <mark>u</mark> .	r the score fron	n the Asse	ssment Tool by se	electing the	e Assessment drop
	• 1=	Poor or Lim	ited				
	• 2=	= Satisfactory					
	• 3=	= Good					
	• 4=	Very Good					
	• 5=	= Excellent					
	Selecti	on Criteria	List				
		~		•	Selection Criteria List	~	
	#▲▼	Criteria	Guidelines As	sessment J	ustification		
	1	Criterion 1 -	Selection Criter a As	ssessment 💙			
	2	Criterion 2 - Hov	v Selection Criter a	Assessment r	equired		
	3	Criterion 3 -	Selection Criter a	0 Does not me	eet criterion		
	8	Selection Criter	a Selection Criter a	1 Poor or man	ginal quality		
	9	Has the Referee	Administration	3 Good quality	і Г		
	10	Has the Referee	Administration	4 Very good q	uality		
	11	Has the	Administration	5 Excellent			
30	For each of field. Note: Each Selection	criterion copy h field has a on Criteria	the text from t 4000 character List	he Assessi	ment Tool into the ding spaces.	correspo	nding Justification
		~	1		Selection Criteria List	~	
	#▲▼	Criteria	Guidelines As	sessment	Justification		
	1	Criterion 1 - Demonstrate	Selection Criteria2 S question Set	Satisfactory	The applicant provided		
		Understanding	assessment				
		of the Need for	value to				
		the Activity in	Assessment	L			
	2	Criterion 2 - Hov	/ Selection CriteriaAs	sessment re			
	3	Criterion 3 -	Selection CriteriaAs	sessment re			

Steps	Actions			
31	Select the Application De	scription tab.		
	Note: If you cannot view th down list.	e Application Descrip	tion, select Application Description	on from the drop
	Legal Entity blocked For New Agreements Current Agreement Exists	Matching Result Provider Blocked For New Agreements	полит прузывани слова и опистеля голону полона т	SAGS Override Reason
	Compliance Criteria Eligibility Criteria Appraisals Gr	ant Agreement Information Agreement Informa	tion Application Financials Application Items Application Description	
			/	1 of 1+
	Application Financials	Application Items	Application Description	
				0
32	Copy the text from Summa Application field.	ary of Application in th	e Assessment Tool into the Sum	imary of
	Copy the text from Summa Assessment field.	ary of Assessment in t	he Assessment Tool into the Su i	mmary of
	Noto, Fook Sold hose a 200	0 ah awa ataw limait in alw		
	Note: Each field has a 200	o character limit inclu	aing spaces.	
	Г			
	Summary of Application:			
				\sim
	Г	test		^
	Summary of Assessment:			
				\sim
		1		
	NOTE: The Summary of	Assessment field ma	v already be pre-populated with t	the Summary of
	Application information. It	so, adjust according	y (copy the correct text from the	Assessment Tool
	into the correct fields).			

Steps	Actions
33	Save the record using Ctrl+S or click the Programs Organisations Funding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Contacts Child Care User Prefere Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding Rounds Administration Sarre
	 ↓ Q I lof 1+ Status Undo Record [Ctrl+U] Delete Record [Ctrl+D] Fundi New Record [Ctrl+N] Copy Record [Ctrl+B] Save Record [Ctrl+S] Statu Save Record [Ctrl+S] Run Query [Alt+ENTER]
34	Click on the Appraisals tab.
35	Highlight the appraisal record ticked as Use as Final with the status In Progress.

teps	Actions							
36	Change the status from In Progress to Completed.							
	Complianc	e Criteria	Eligibility Crite	eria Apprais	sals Grant Ag	reement Inform	ation	Agreement Information
	Appraisals							
	-		~		•			
	Jse as Final	Appraisal	Type Appraise	Last Name App	oraiser First Name	Status	Score	Banding
	~	Assessme	nt s47E			In Progress		
						Completed		
						Withdrawn		
						Baseline		
37	A Score	nd Bandi		ulate based	on your asse	esement		
51	Type Appr	aiser Last N	lame Apprais	er First Name	Status	Score	В	anding
		-			÷			
	1 \$47E				Completed	6	1	
	2000 (1.4	55 806A		AND IN THE AVE				
38	Change th	e Applic	ation Sub S	Status to Co	omplete.			
	Home Programs	Organisations Fun	ding Rounds Funding A	greements Milestones	Payments Reviews Su	mmaries Geo Spatial A	ctions Litera	ture Contacts Child Care 🛩
	Applications All Fun	ding Rounds My M	anaged Funding Rounds	Registrations DOI Fund	ding Rounds Administration			
	SHIC						+	Q 🍪 🗏 tota k 🖉
	n Details				Appraisal Details			Status Details
	1 Details Id 4 S4 7	'E	Primary Contact	s47E	Appraisal Details	Evaluation Team	Team 🖪	Status Details Funding Round Phase: Open/Appraise
	1 Details Id + S4 Program Name + S4	'E 7E ®	Primary Contact Funding Ap <mark>pl</mark> ied For	s47E s47E s47E	Appraisal Details	Evaluation Team Assessment Compliant Yes	Team 🗷	Status Details Punding Round Phase Open/Appraise Status * Under Assessment
	t Details td + S4 Program Name + S4 inding Round Name + S4	'E 7E (8) 'E (3)	Primary Contact Funding Applied For Recommended Funding	s47E s47E s47E	Appraisal Details	Evaluation Team Assessment Compliant Yes Eligible Yes	Team 3	Status Details Funding Round Phase Open/Appraise Status * Under Assessment Sub Status * Complete
	1 Details td + S4 Program Name + S4 inding Round Name + S4 Registration (d S4 Freedistration (d S4	'E 7E (6) 'E (6) 'E (6)	Primary Contact Funding Applied For Recommended Funding Places/Services Applied For Recommended	s47E s47E s47E	Appraisal Details	Evaluation Team Assessment Compliant Yes Eligible Yes Score 6	Team	Status Details Funding Round Phase Open/Appraise Status • Under Assessment ¥ Sub Status • Complete ¥ Status • complete ¥ 2
	t Details Id + S4 Program Name + S4 Inding Round Name + S4 Registration Id S4 Financial Year 20	'E 7E ® 'E ® 6-2017 ❤	Primary Contact Funding Applied For Recommended Funding Places/Services Applied For Recommended Places/Services Application Science	s47E s47E s47E	Appraisal Details	Evaluation Team Assessment Compliant Yes Eligible Yes Score 6 Banding 1	Team 3	Status Details Funding Round Phase Open/Appraise Status • Sub Status • Sub Status • Complete Shortisted Check Australian
	t Details Id + S4 Program Name + S4 Inding Round Name + S4 Registration Id S4 Financial Year Number Submission Date - 24	"E 7E \$1 "E 5 6-2017 ▼	Primary Contact Funding Applied For Recommended Funding Places/Services Applied For Recommended Places/Services Application State Late Application	s47E s47E s47E s47E	Appraisal Details	Evaluation Team Assessment Compliant Ves Eligible Ves Score 6 Banding 1 Ranking OP D& Revgree 7	Team C	Status Details Funding Round Phase Open/Appraise Status ◆ Under Assessment Sub Status ◆ Complete Shortlisted Check Application Round Defaults Checked
	t Details Id + S4 Program Name + S4 Inding Round Name + S4 Registration Id S4 Financial Year Number Submission Date + 24	"E® "E® 6-2017 ← 01/2017 0123-31 PM 01/2017 / m	Primary Contact Funding Applied For Recommended Funding Places/Services Applied For Recommended Places/Services Application State Late Application Submission Twee +	S47E S47E S47E On Time V OnTime V	Appraisal Details	Evaluation Team Assessment Compliant Yes Eligible Yes Score 6 Banding 1 Ranking QP QA Review Ø	Team C	Status Details Funding Round Phase Open/Appraise Status + Under Assessment Sub Status + Complete Sub Status + Complete Check Application Annue Generated Minue Generated
	t Details Id + S4 Program Name + S4 Inding Pound Name + S4 Registration Id S4 Financial Year Submission Date = 24 Received Date + 24 Funding Round Type	'E /5 'E 5 'E 5 6-2017 ♥ 01/2017 01 23 31 PM 11/2017 11/2017 11/2017	Primary Contact Funding Applied For Recommended Funding Places/Services Applied For Recommended Places/Services Application State Late Application Submission Type • Number of Attachments	S47E S47E S47E On Time V On Time V Online - External HTML V 3	Appraisal Details	Evaluation Team Assessment Compliant Yes Eligible Yes Score 6 Banding 1 Ranking QP QA Review 17	Team 3	Status Details Funding Round Phase Open/Appraise Status + Under Assessment Sub Status + Complete Sub Status + Complete Sub Status + Complete Check Application Round Defaults Checked Minute/Ref Number
Steps	s Actions							
-------	---	--						
39	Save the record using Ctrl+S or click the drop down and select	Save Record.						
	Home Programs Organisations Funding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Applications All Funding Rounds My Managed Funding Rounds Registrations DDI Funding Rounds Administration \$47E	Literature Contacts Child Care User Preferen						
	Apprice unit occasion Id a \$47E Primary Contract \$47E Excellence And Server & S47E Primary Contract \$47E Prim	Status Desails						
	+ Q 🌣 🔹 1 of 1+ Undo Record [Ctrl+U]							
	Status Delete Record [Ctrl+D] Fundi New Record [Ctrl+N]							
	Copy Record [Ctrl+B]							
	Statu New Query [Alt+Q]							
	Run Query [Alt+ENTER]							

Logging Out of FOFMS

Steps	Actions									
<mark>4</mark> 0	To log out of FOFMS	6 select	File the	en Log (Out or use s	shortcut (Ctrl+Shif	ft+X.		
	ORACLE	File	Edit	View	Navigate	Query	Tools	ools Help	Search	
	22203	Create Bookmark								
	Home:	Log	Dut [Ctrl-	+Shift+X]						

Need Help?

For further assistance please speak to your Team Leader.





FOFMS TASKCARD

Re-assessing Applications -Partial Re-assessment

This task card will take an Assessor through the process of completing a partial re-assessment of an application in FOFMS.

Contents

Page

Open the Application Record	2
Update the Assessment in FOFMS	11
Update the Summary of Application and Assessment	18
Complete the Partial Re-Assessment in FOFMS	19
Log out of FOFMS	20
Need Help?	20

Before you begin ensure you have:

- The Application Id of the Application that requires re-assessing.
- The required changes to the assessment.

FOFMS Access Required:

• FOFMS Application Appraiser

*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.

Update Instructions For Each Funding Round

- Update Step 15 with the appropriate ARC Folder Record Number
- Add or change steps as required to reflect funding round specific processes

Open the Application Record

Steps	Actions							
1	Open FOFMS to access the Application Record							
2	Click on the Funding Rounds tab. Click on the Applications link.							
	CRACLE File Edit View Navigate Query Tools Help							
	Application:							
	Home Programs Organisations Funding Rounds Funding Agreements							
	Applications All Funding Rounds My Managed Funding Rounds Registration My Entered Applications							
	✓							
	Id Program Name Funding Round I Financial Period Number Submission							

Steps	Actions
3	Click on the drop down menu
	Select My Evaluation Team's Applications.
	Home Programs Organisations Funding Rounds Funding A
	Applications All Funding Rounds My Managed Funding Rounds
	My Entered Applications
	✓ ④
	Id Program Name Funding Round I Financial Period Number
	Home Programs Organisations Funding Rounds Fundi
	Applications All Funding Rounds My Managed Funding Roun
	My Evaluation Teams Applications 🗸
	· · · · · · · · · · · · · · · · · · ·
	d Program Name Funding Round Financial Period Number
1	Click on the drop down menu
	Select Id.
	Home Programs Organisations Funding Rounds Funding Agreem
	Applications All Funding Rounds My Managed Funding Rounds Regi
	My Evaluation Teams Applications V
	✓ ④
	I Id And I Financial Period Number Su
	Program Name
	Funding Round Name
	Financial Period

Steps	Actions								
5	Enter the Application Id in the next field. Click 💿.								
	Home Programs Organisations Funding Rounds Funding								
	Applications All Funding Rounds My Managed Funding Rounds								
	My Evaluation Teams Applications V								
	Id v s47E								
	Id Program Name Funding Round I Financial Period Number								
6	The application record will open.								
	Home Programs Organisations Funding Rounds Funding Agreemen								
	Applications All Funding Rounds My Managed Funding Rounds Registr								
	My Evaluation Teams Applications V								
	Id S47E								
	Id Program Name Funding Bound Name Financial Period								
	s47E s47E 2016-2017								



teps	Actions													
8	Change the Sub Status to Appraisal.													
un 653 55	Home Programs Organisations Funding Ro	unds Funding A	Agreements I	Vilestones	Payments	Reviews	Summaries	Geo Spatial	Actions Lite	rature Cor	ntacts (Child Care Us	er Preferences.	
	Applications All Funding Rounds My Managed	Funding Rounds	Registrations	DOI Fund	ling Rounds	Administrati	2n							
	s47E + Q @ « totti > ,													
	Application Details						Appraisal Deta	ails			ST	atus Nataile		_
	id∗ \$47E		Primary Contact	s47E				Evaluati	on Team Assessm	ent Team	100	unding Round Pha	open/Appraise	
	Program Name + S47E	Ful	inding Applied For	s47E				c	omplient Yes		~	Stetu	us \star Under Assessmi	ent 💙
	Funding Round Name IS47E	Recom	nmended Funding	54/E					Eligible Yes		×)	Sub Statu	ISTA Complete	*
	Registration Id. 547 E	Places/Ser	Recommended						Score 6		/	Status Change Dat	te • 10/02/2017	
	Number	1.	Places/Services	NSW		-			Banking OP	- /	4	Check Applicati	ion of	
	Submission Date 24/01/2017 01:21:31	PM	Late Application	On Time				Q	A Review: 🗹	1	unding Rou	nd Defaults Check	iea 🗆	
	Received Date + 24/01/2017	I s	Submission Type •	Online - Exter	mal HTML				1.0			Minute Generat	tedi 🗌	
	Funding Round Type	V Numbe	er of Attachments	3						1. A.		Minute/Ref Numi	ber	
	Application Submission Reference S47E													
	From the Sub Status Status Details	drop de	own m	ienu s	selec	t App	oraisal	/						
	From the Sub Status Status Details Funding Round Phase:	drop de	own m	ienu s	selec	t Apı	oraisal	/						
	From the Sub Status Status Details Funding Round Phase: Status *	Open/Ap	own m opraise ssessme	enu s		t Ap	oraisal	/						
	From the Sub Status Status Details Funding Round Phase Status * Sub Status *	Open/Ap Under As	own m opraise ssessme	ent x		t App	oraisal	/						
	From the Sub Status Status Details Funding Round Phase Status * Sub Status * Status Change Date *	Open/Ap Under As Complete Not S	own m opraise ssessme e Started	ent s		t App	oraisal							
	From the Sub Status Status Details Funding Round Phase Status * Sub Status * Status Change Date * Shortlisted	Open/Ap Under As Complete Not S Comp	own m opraise ssessme te Started oliance	nt ×		t App	oraisal							
	From the Sub Status Status Details Funding Round Phase: Status * Sub Status * Status Change Date * Shortlisted Check Application	Open/Ap Under As Complete Not S Comp Eligibi	own m opraise ssessme started oliance ility aisal	int ×		t Ap	Sta	tus D	etails					
	From the Sub Status Status Details Funding Round Phase: Status * Sub Status * Status Change Date * Shortlisted Check Application g Round Defaults Checked	Open/Ap Under As Complete Not S Comp Eligibi Appra	own m opraise ssessme started oliance ility aisal olete	nt ×		t Ap	Sta Fu	tus D	etails Round Pf	nase	Open	/Apprais	se	
	From the Sub Status Status Details Funding Round Phase: Status * Sub Status * Status Change Date * Shortlisted Check Application g Round Defaults Checked Minute Generated	Open/Ap Under As Complete Not S Comp Eligibi Appra Comp Outst	own m opraise ssessme started oliance ility aisal olete canding	nt ×		t Ap	Sta Fu	tus Duunding I	etails Round Pf Sta	nase:	Open Unde	/Apprais	se sment	~

Steps	Actions									
9	Enter the type of re-assessment being undertaken in the Ranking field.									
	Re-Assessment Type Requested from									
	QA Reviewer	QP								
	Moderator MP									
	If it is a Partial Re-assessm If it is a Partial Re-assessm Note: If the application has deleting the existing text an	ent requested ent requested been re-asses d without space	by the QA Rev by the Modera ssed multiple tin ces i.e. QPMP	viewer, select QF tor, select MP. mes, enter the ne	o. ext Ranking	value wit	thout			
	Home Programs Organisations Funding Rounds Funding Applications All Funding Rounds My Managed Funding Rounds \$47E	r Agreements Milestones Pay Registrations DDI Funding R	ounds Administration	Geo Spatial Actions Literature (Contacts Child Care Us	er Preferences	۰.			
	Application Details		Appraisal Deta	ils	Status Details					
	Id a S47E	Primary Contact S47E		Evaluation Team Assessment Team	Funding Round Pha	Open/Appraise	1.			
	Program Name + 547 E F	unding Applied For S47E		Compliant Ves	Y State	Under Assessment	~			
	Benistration Id S47E II Places/S	ervices Applied For		Score 6	Status Change Da	6 * 10/02/2017	-			
	Financial Year 2016-2017	Recommended		Banding 1	Shortis	led	* 1			
	Number	Application State NSW	~	Ranking OP	Check Applicat	ion 🗹				
	Submission Date 24/01/2017 01:21:31 PM	Late Application On Time	~		Fundin Round Defaults Check	ed 🗌				
	Received Date + 24/01/2017	Submission Type . Online - External H	TML Y		Minute Genera	ied. 🗆	5			
	Funding Round Type Num	Ger of Attachments 3			Minute/Ref Num	ber				
	Appraisal Details									
	Eva	aluation Team:	Assessment Te	am 🔍						
		Compliant	Yes	~						
		Eligible	Yes	∼						
		Score	6							
		Banding	1	×						
		Ranking	QP							
		QA Review		Funding						

Steps	Actions
10	Save the record using Ctrl+S or click the drop down and select Save Record. Home Programs Organisations Funding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Contacts Child Care User Preferer Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding Rounds Administration
	Apprication Details Apprication Details Status Details Id + \$47E Primary Contact \$47E Evaluation Team If Assessment Team If Indire Control to the second
	+ Q ✿ I of 1+ Status Undo Record [Ctrl+U] Delete Record [Ctrl+D]
	 New Record [Ctrl+N] Copy Record [Ctrl+B] Save Record [Ctrl+S]
	Statu New Query [Alt+Q] Run Query [Alt+ENTER]
11	You may need a copy of the Application Form and/or the completed Assessment Tool to complete the re-assessment.

S	Actions			
2	Click on the Attachme	ents tab		
				la dura darra Kad
	Note: If you cannot vie	ew the Attachments tab	, select Attachments from tr	ne arop aown list.
	forme Programs Organisations Funding Round	Funding Agreements Milestones Payments	Reviews Summaries Geo Spatial Actions Literature Conta	acts Child Care User Preferences
	All Funding Rounds My Managed Funding Rounds My Managed Funding 847E	ding Rounds Registrations DOI Funding Rounds Adi	ministration	 Рананд коака книже оренукруписе
	Program Name + S47E	Funding Applied For S47E	Compliant Yes	V Status * Under Assessment V
	Funding Round Name . S47E	Recommended Funding S47E	Eligible Yos	Sub Status + Appraisal
	Registration IdS47E	Places/Services Applied For	Score 6	Status Change Date + 10/02/2017
	Financial Year 2016-2017	Places/Services	Banding: 1	Shortlisted
	Number	Application State NSW 🗸	Ranking QP	Check Application 🗵
	Submission Date 24/01/2017 01:21:31 PM	Late Application On Time 💙	QA Review 🗹 🛛 Fun	nding Round Defaults Checked 🔲
	Received Date = 24/01/2017	Submission Type 🖌 Online - External HTML 💙		Minute Generated 🗔
	Funding Round Type	Number of Attachments 3		Minute/Ref Number
	Application Submission Reference S47E			
	Organisation Details		Departmental Contacts	SACS Details
	Legal Entity Id: S47E	Provider Id S47E	Last Name S47E	SACS Approval + Not Applicable
	Legal Entity Name S47E	Provider Name S47E	First Name S47E	Legal Entity SACS Award NSW
	Legal Entity Address S47E	Business Name S47E	Phone S47E	Submitted SACS Award
	Legal Entity Status Activo	Business Name from ABR 🐱	Email Address S47E	Override SACS Award
	cA7E	547E =	Other Applications	SACS Award Override Details
		Provider Address 547 E	Another Application Exists in this Functing Round N	SAGS Override Date/Time
	Matching Result Matched	Provider Status Active	Another Application Exists in Different Eurorian Reads	SACS Override By
	Transf Dates Directory	Operation	Principal Physics and the second of the seco	and official by
	Legal Entity Blocked	Matching Result Matched		
	Legal Entity Blocked For New Agramments Ourrent Agreement Exists IP Compliance Ontena Eligibility Ontena Appraisals	Provider Matched V Provider Blocked For New Agreement Information Agreement Information	n Application Financials Application Items ABR Details – Legal E	SACS Override Reason
	Legal Entity Blocked For New Agramments Ourrent Agreement Exists IP Compliance Ontena Eligibility Ontena Appraisals	Matching Result Matched V Provider Blocked For New Agreement Information Agreement Information	n Application Financials Application Items ABR Detail – Legal E	SACS Override Reason
	Legal Entity Blocked For Iver Agreement Dists	Matched Matched Matched Matched Matched Matched Matched Provider Blocked Provider Blocked For New Agreements Grant Agreement Information Agreement Information	n Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Corrent Agreement Exists 3 Corrent Agreement Exists 3 Compliance Criteria Eligibility Criteria Appraisals	Matching Result Matched Provider Blocked Provider Blocked For New Agreement Information Grant Agreement Information Calls – Legal Entity Application	n Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Corrent Agreement Exists @ Corrent Agreement Exists @ Compliance Criteria Eligibility Criteria Appraisals Application Items ABR Det	Matching Result Matched Provider Blocked Provider Blocked For New Agreement Information Grant Agreement Information Calls – Legal Entity Application	n Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Correct Agreement Easts	Matched Matched Matched Matched Matched Matched For New Agreements Grant Agreement Information Agreement Information arials – Legal Entity Application	n Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Compliance Criteria Eligibility Criteria Appraisals Compliance Criteria Eligibility Criteria Appraisals Application Items ABR Det	Matching Result Matched Matched Matched Matching Result Matched Provider Blocked Franker Agreement Information Agreement Information	n Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Compliance Criteria Eligibility Criteria Appraisals Compliance Criteria Eligibility Criteria Appraisals Application Items ABR Det	Matching Result Matched Matched Matched Matching Result Provider Blocked Provider Blocked Franker Agreement Information Agreement Information	n Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocked Current Agreement Exists Compliance Criteria Eligibility Criteria Appplication Items ABR Details	Accreditations Metched	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocked Current Agreement Exists Compliance Criteria Eligibility Criteria Application Items ABR Details	Accreditations Metched	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocked Current Agreement Exists Compliance Criteria Bigibility Criteria Application Items ABR Details	Accreditations Metched Agreement Information Agreeme	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocket Current Agreement Exists Compliance Criteria Bigibility Criteria Application Items ABR Details	Accreditations Method Agreement Information Agr	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocket Current Agreement Exists Compliance Criteria Bigibility Criteria Application Items ABR Details	Accreditations Method Agreement Information Agreement Information Agreement Information Agreement Information Application Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocket Current Agreement Exists Compliance Criteria Eligibility Criteria Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocked Current Agreement Exists Compliance Criteria Eligibility Criteria Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Application Items ABR Details - Provider	Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocked Current Agreement Exists Compliance Criteria Eligibility Criteria Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocket Correct Agreement Exists Compliance Driters Eligibility Onterna Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocket Current Agreement Exists Compliance Driters Eligibility Onterna Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E	SACS Override Reason
	Legal Entity Blocket Correct Agreement Exists Compliance Driters Eligibility Onterna Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E Application Financials Application Items ABR Detail - Legal E on Description Description Application Description Attachments Doundaries Contacts Coverage Document Production H Fee Sets Notes Organisation Description Places/Services Reviews	SACS Override Reason
	Application Items ABR Det	Accreditations Application	Application Financials Application Items ABR Detail - Legal E Application Tenancials Application Items ABR Detail - Legal E on Description Description Application Description Application Descenting Attachments Doundaries Contacts Coverage Document Production H Fee Sets Notes Organisation Description Places/Services Reviews Services Provided	SACS Override Reason
	Legal Entity Blocket Correct Agreement Exists Compliance Driters Eligibility Onterna Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E Application Financials Application Items ABR Detail - Legal E An Description Description Application Description Attachments Doundaries Contacts Coverage Document Production H Fee Sets Notes Organisation Description Places/Services Reviews Services Provided Risk Assessment	SACS Override Reason
	Legal Entity Blocket Correct Agreement Exists Compliance Driters Eligibility Onterna Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E Application Financials Application Items ABR Detail - Legal E An Description Description Application Description Attachments Doundaries Contacts Coverage Document Production H Fee Sets Notes Organisation Description Places/Services Reviews Services Provided Risk Assessment Status History	SACS Override Reason
	Legal Entity Blocket Correct Agreement Exists Compliance Driters Eligibility Onterna Application Items ABR Details	Accreditations Application	Application Financials Application Items ABR Detail - Legal E Application Financials Application Items ABR Detail - Legal E An Description Description Application Description Attachments Douncaries Contacts Coverage Document Production Items Contacts Coverage Document Production Items Contacts Coverage Coverage Document Production Items Coverage Places/Services Provided Risk Assessment Status History Target Groups	SACS Override Reason

Steps	Actions									
13	Click on the Receipt hyperlink to open a copy of the Application Form.									
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information									
	Attachments									
		~		\odot						
	Attachments Na Document	Type Size(In Bytes)	Туре	Modified	Local					
	s47E Applicatio	n Form11,042	xlsx	24/01/2017 01:.						
	Receipt	375,404	pdf	24/01/2017 01:.	Ү					
14	Attachments Name DSS Standard Form Release The following box will oper File Download You are downloading the file 'Rec like to edit the file directly or down computer? Edit button is disabled as Siebel was Desktop Integration Siebel Agent. Edit Doyou want to open or save Receipt.pdf If required, open other at	2 en. Click Download where the connect of the connect to where the connect to where the connect to from dssgrants.gateway.internal?	, then Open . ing the approp	Open	Save Cancel X					
15	Open ARC to access the Assessment Tool and the Assessment Matrix by clicking on User Labels. ARC Folder – EEXX/XXXXXX									
	NOTE: See steps 14-15 Labels. If your User Lal	of the 'Assessing bels are not set up,	Applications' please speal	' taskcard for hov k with your Team	v to access User Leader.					
16	Undertake the Partial Re	-Assessment.								

Update the Assessment in FOFMS

eps	Actions								
17	To update ONLY the Summary of Application and /or the Summary of Assessment fields go to Step 36.								
	To update the Sco	res/Justifica	ation	is and the Summ	nary fie	lds go to	step 18.		
18	Click on the Appra	isals tab.							
	Home Programs Organisa	ations Funding F	lounds	Funding Agreements	Milestones	Payments	Reviews Summaries	Geo Spatial Actions	
	Applications All Funding Rou	inds My Manage	ed Fundi	ing Rounds Registrations	DOI Fund	ding Rounds Ad	ministration		
	Application Details	647E			0475	-	Appraisar Detai	IS	5
	Id.+	\$47E		Primary Contact	547E			Evaluation Team: As	5
	Program Name *	eA7E	9	Funding Applied For	s47E			Compliant: Ye	1
	Funding Hound Name *	547E	-	Recommended Funding	3112			Eligible: Ye	1
	Figancial Veer	2016 2017		Recommended				Bonding: 1	
	Financial Teal	2010-2017		Places/Services	NGW	~		Banking 1	
	Submission Date	24/01/2017 01-21-31	PM	Late Application	On Time	· ·			
	Received Date +	24/01/2017	() ()	Submission Type:	Online - Exte	mal HTML V		div new en	
	Funding Round Type	2401/2011	~	Number of Attachments	3				
	Application Submission Reference	s47E							
	Organisation Details						Departmental C	ontacts	
	Legal Entity Id	s47E		Provider Id	s47E			Last Name: 54	i
	Lenal Entity Name	s47E	ব	Provider Name	s47E	নি		First Name 54	t
	Logal Entity Address	s47E	201	Pusinase Name	s47E			Phone: 02	
	Legal Entity Status	Active		Business Name from ABR	2			Email Address. <mark>\$4</mark>	7
	401	s47F		Durida Adda	s47E		Other Application	ons	Ĺ
	ABN.	-		Provider Address.			Another Application Exists	in this Funding Round: N	
	Matching Result	Matched	~	Provider Status	Active		Another Application Exists in D	ifferent Euorling Bound X	
	For New Agreements			Matching Result	Matched	~	Another Application Exists in D	interent running hound.	
	Current Agreement Exists	Z		For New Agreements.					
	Compliance Criteria Eligibilit	y Criteria Apprai	sals	irant Agreement Informatio	on Agreer	nent Informatio	n Application Financials	Application Items	4
		-	1						
	Compliance Criteri	a Eligibilit	ty Cri	teria Appraisal	s Gra	ant Agreer	nent Information	Agreement Ir	Π
		-	0			-		-	
	Appraisals								I
		1. 11			0				
		~			\odot				L
	Use as Final Appra	isal Type Ap	prais	er Last N Appraiser	First N St	tatus	Score	Banding	
	_		Inclusion	s47E		a a alia a			
	Asses	sment Ad	iminis	strator	Ba	aseline			

Steps	Actions
19	Highlight the completed Appraisal Record ticked Use as Final.
	Flicibility Oritoria Approicals Creat Agreement Informat
	Eligibility Criteria Appraisais Grant Agreement Information
	Appraisals
	✓
	Ise as Final Appraisal Type Appraiser Last Name Appraiser First Name Status
	Assessment s47E Completed
20	Click and select Copy Record.
	ABR Details – Legal Entity ABR Details – Provider Accreditations
	+ Q ✿ 2-4 of 4 ∡*
	Undo Record [Crl+U]
	Delete Record Ctrl+D]
	New Record [Jtrl+N]
	Copy Record [Ctrl+B]
	Save Record [Ctrl+S]
	New Query [Alt+Q]
	Run Query [Alt+ENTER]
21	A new Appraisal Record will appear. Tick Use as Final.
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Applicat
	Appraisals
	✓ 🕢
	Use as Final Appraisal Type Appraiser Last N Appraiser First N Status Score Banding
	Not Started
	Assessment Administrator Baseline

Steps	Actions							
22	From the Appraisal Type drop down menu select Assessment.							
	raisals							
	✓							
	nal Appraisal Type Appraiser Last N Appraiser First N Status	s Sc						
	Not St	tarted						
	Assessment diministrator s47E Basel	ine						
23	In the Appraiser Last Name field, click the glyph							
	isals							
	✓ ④							
	Appraisal Type Appraiser Last Name Appraiser First Name	Status !						
	Assessment	Not Started						
	Assessment Administrator	Baseline						

Steps	Actions
24	A pop up box will open. Highlight your name. Click OK .
	Pick Employee
	Q Last Name ✓ → 1 - 10 of 10+
	Last Name First Name Login Position Job Title
	s47E FaCS App
	M Previous Page M Previous Record Next Record M Next Page
25	Change the Status to In Progress.
	nicole
	Appraisal Type Appraiser Last N Appraiser First N Status Score
	Assessment Administrator ^{\$47E}
26	
20	Save the record using Ctrl+S or click the drop down and select Save Record.

Steps	Actions								
27	Highlight	he appraisa	record ticke	d as Use as Final	and the sta	itus as In	Progress.		
	Compliand	e Criteria El	igib <mark>i</mark> lity Criteria	Appraisals Gran	t Agreement Ir	formation	Agreement Information		
	Apprai	sals							
		~		•					
	Use as Final	Appraisal Typ	e Appraiser Last	t Name Appraiser First Na	ame Status	Score	Banding		
	✓	Assessment	s47E		In Progre	ess 💙			
28	Scroll dov	/n to the Sel	ection Crite	ria List . Siebel Basel	ine				
	~	Assessment	./E	In Pro	gress				
					H Prev	ious Page 👭 Previ	ous Record Next Record ₩ Next Page H		
	Selectio	n Criteria Li	st						
		~		Selection Crit	eria List 🗸				
	#▲▼	Criteria G	uidelines Asse	ssment Justification					
	1	1 Criterion 1 - Selection CriteriaAssessment re							
	2	Criterion 2 - How S	election CriteriaAsse	ssment re					
Surface of	3	Criterion 3 - S	election CriteriaAsse	ssment re					
29	drop down • 1 = • 2 = • 3 =	n to update a n menu. = Poor or Lir = Satisfactor = Good	score for a c nited y	riterion, enter the	Score by se	electing it i	rom the Assessment		
	• 4 = • 5 =	= Very Good = Excellent							
	Select	on Criteria	List						
		~		Sele	ction Criteria Lis	~			
	#▲▼	Criteria	Guidelines	Assessment Justifica	ation		-		
	1	Criterion 1 -	Selection Criteri	Assessment 💙					
	2	Criterion 2 - Ho	w Selection Criteri	Assessment require	d				
	3	Criterion 3 -	Selection Criteri	1 Poor or marginal o	uality				
	8	Selection Crite	riaSelection Criteri	2 Satisfactory					
	9	Has the Refere	e Administration	3 Good quality					
	11	Has the	Administration	4 Very good quality 5 Excellent					
	10 11	Has the Refere	e Administration Administration	4 Very good quality 5 Excellent					

Steps	Actions
30	f required to update the Justification for a criterion, copy the text from the Assessment Tool into he corresponding Justification field. <i>Note: Each field has a 4000 character limit including spaces</i> .
	Selection Criteria List
	Selection Criteria List V
	Criteria Guidelines Assessment Justification
	Criterion 1 - Selection Criteria2 Satisfactory Demonstrate question. Set Understanding assessment of the Need for value to the Activity in Assessment
	Criterion 2 - How Selection CriteriaAssessment re
	Criterion 3 - Selection CriteriaAssessment re
51	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Appraisals
32	Change the status from In Progress to Completed. Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information
	Appraisals
	↔
	se as Final Appraisal Type Appraiser Last Name Appraiser First Name Status Score Banding
	Assessment S47E In Progress V Completed Withdrawn Baseline

Steps	Actions							
33	A Score and Banding will populate based on your updated assessment.							
	Type Appraiser Last Name Appraiser First N		irst Name	Status		Score	Banding	
	ı	- \$47E		Comple	eted	6	1	
34				44				
	Save	e the record using CtrI+S or cl	lick the	\$	drop	down and s	elect Save Record.	
35	lf you Asse	u are required to also update t essment go to Step 36 otherv	the Sum r wise go to	nary of Step 3	Appli 39.	cation and/	or the Summary of	

Update the Summary of Application and Assessment

Steps	Actions
36	Select the Application Description tab. Note: If you cannot view the Application Description, select Application Description from the drop down list.
	Edge in this blocked Flow agreements Current Agreement Sists Matching Result Current Agreement Exists Provider Blocked For New Agreements SAGS Override Reason Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Application Financials Application Description Image: Criteria
	Application Financials Application Items Application Description
37	To update the Summary of Application , copy the text from Summary of Application in the Assessment Tool into the Summary of Application field. To update the Summary of Assessment , copy the text from Summary of Assessment in the Assessment Tool into the Summary of Assessment field.
	Note: Each field has a 2000 character limit including spaces.
	Summary of Application:
	Summary of Assessment:
38	Save the record using CtrI+S or click the drop down and select Save Record .

Complete the Partial Re-Assessment in FOFMS

Steps	Actions			
39	Change the Applicat	ion Sub Status to 0	Complete.	
	Home Programs Organisations Funding	Rounds Funding Agreements Milestone	s Paymenta Reviews Summaries Geo-Spatial Actions	s Literature Contacts Child Care 🗸
	Applications All Funding Rounds My Manag	ed Funding Rounds Registrations DOI F	unding Rounds Administration	
	s47E			+ Q 🚯 4 .1 of 1+ 🕨 🖉
	1 Details		Appraisal Details	Status Details
	Id . S47E	Primary Contact S47E	Evaluation Team Assessment Team	n 🖉 Funding Round Phase Open/Appraise
	Program Name • S47E	Funding Applied For S47E	Compliant Yes	VINDER Status * Under Assessment
	Inding Round Name * S47E	Recommended Funding. S47E	Eligible. Yes	Sub Status:* Complete
	Registration ld: S4/E	es/Services Applied For Recommended	Score 6	Status change bare # 10002.0011
	Financial Year: 2016-2017	Places/Services	Banding 1	Shortlisted.
	Number	Application State NSW	Banking QP	Check Application
	Submission Date 24/01/2017 01.21.31 PM	Cuter Application On time	QA HEVIEW M	Funding Hound Defaults Checked.
	Funding Round Type	Number of Attachments 3		Minute/Bef Number
	ubmission Reference. S47E			
	Status Details			
			- /	
	Funding Round Phase:	Open/Appraise		
	Status *	Under Assessment	~	
	Sub Status	Complete ×		
	Status Change Date *	Not Started		
	Chardinted	Compliance		
	Shortlisted	Elizibility		
	Check Application:	Approincy		
	a Davied Defaults Chasland	Appraisai		
	g Round Defaults Checked.	Complete		
	Minute Generated:	Outstanding		
		Endorsed		
	Minute/Ref Number:	Endorred with Chan	205	
		Endorsed with Crian	ues	
40				
40			8	
	Save the record using	Ctrl+S or click the	drop down and sele	ect Save Record.
	and the second			

Log out of FOFMS

Steps	Actions									
1	To log out of FOFMS select File then Log Out or use shortcut Ctrl+Shift+X.								_	
	ORACLE	File	Edit	View	Navigate	Query	Tools	Help	Co Search	
	R R & @ B	Creat	e Bookn	nark						
	Home:	Log (Dut [Ctrl+	-Shift+X]						

Need Help?

For further assistance please speak to your Team Leader.





FOFMS TASKCARD

Full Re-Assessment

This task card will take an Assessor through the process of completing a full **re-assessment** of an application in FOFMS.

A full re-assessment should be undertaken where an entirely new appraisal is required by a different assessor. The initial assessment must have been completed, a QA Review completed, a Moderation completed and a full re-assessment triggered.

Before you begin ensure you have;

The Application Id of the record you will be assessing

FOFMS Access Required:

FOFMS Application Appraiser

Open the Application Record

Actions						
Open FOFMS to access the Application Record						
Click on the Funding Rounds tab. Click on the Applications link.						
ORACLE' File Edit View Navigate Query Tools Help						
Q ⊕ ² 8 ² ⊨ ₩						
Application:						
Home Programs Organisations Funding Rounds Funding Agreements						
Applications All Funding Rounds My Managed Funding Rounds Registration						
My Entered Applications						
✓						
Id Program Name Funding Round I Financial Period Number Submission						

Steps	Actions
3	Click on the drop down menu Select My Evaluation Team's Applications.
	Home Programs Organisations Funding Rounds Funding A
	Applications All Funding Rounds My Managed Funding Rounds
	My Entered Applications
	Id Program Name Funding Round I Financial Period Number
	S
	Home Programs Organisations Funding Rounds Fundi
	Applications All Funding Rounds My Managed Funding Roun
	My Evaluation Teams Applications 🗸
	✓ ④
	d Program Name Funding Round I Financial Period Number
-	s47E 2016-2017
4	Click on the drop down menu. Select Id.
	Home Programs Organisations Funding Rounds Funding Agreem
	Applications All Funding Rounds My Managed Funding Rounds Regi
	My Evaluation Teams Applications V
	Program Name
	Funding Round Name
	Financial Period 21

Steps	Actions
5	Enter the Application Id in the next field. Click 💿.
	Home Programs Organisations Funding Rounds Funding
	Applications All Funding Rounds My Managed Funding Rounds
	My Evaluation Teams Applications V
	Id 🗸 Id Is47E
	Id Program Name Funding Round Financial Period Number
6	The application record will open. Click on the hyperlink in the Id column.
	Home Programs Organisations Funding Rounds Funding Agreemen
	Applications All Funding Rounds My Managed Funding Rounds Registr
	My Evaluation Teams Applications V
	Id 💙 💅 🕤
	Id Program Name Funding Round Name Financial Period
	s47E 2016-2017
	<

Steps	Actions	
7	The Application Record will open. Check that the QA review box is un-tick	ed.
	Home Programs Organisations Funding Rounds Funding Agreements Milestones Pa	avments Previews Summanes Geo Spabiel Actions Literature Contacts Child Care User Preferences
	Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding	Rounds Administration
	\$47E	+ Q & C 1010 + 2
	Application Details	Appraisal Details
	Id + S47E Primary Contact: S47E	Evaluation Team Assessment Team 💿 Finding Round Phase Open/Appraise
	Program Name + S47E Funding Applied For S47E	Compliant Yes 💙 Status 🕯 Under Assessment 💙
	Funding Round Name * S47E Becommended Funding S47E	Eligible Yes 💙 Sub-Status 🕯 Complete 🌱
	Registration Id S47E Places/Services Applied For	Score 6 ratus Change Date + 10/02/2017
	Financial Vear 2016-2017 V Places/Services	Banding 1 Shortlisted
	Number Application State NSW	Check Application
	Submission Date 24/01/2017 01:21:31 PM Late Application On Time	QA Review D Funding Rou of Defaults Checked
	Received Date * 24/01/2017 0 Submission Type * Online - External +	HTML Y Minute Generated
	Funding Round Type Number of Attachments 3	Minute/Ref Number
	Appraisal Details Evaluation Team:	Assessment Team
	compliant.	res
	Eligible:	Yes 🗸
	Score:	6
	Banding	1
	Ranking:	
	QA Review	L Funding

Steps	Actions				
8	Change the Sub Status	o Appraisal.			
	Home Programs Organisations Funding Rounds Applications All Funding Rounds My Managed Funding	unding Agreements Milestones Payme Sounds Registrations DO Funding Rou	ents Reviews Summaries Geo-Spatial Actions	Literature Contacts Child Care User Preferen	ces
	s47E			+ 9 0	€ 10f1+ 🕨 💡
	Application Details	s47E	Appraisal Details	Statue Dataile	
	Id + S47E	Frimary Contact: 547E Funding Applied For S47E	Evaluation Team Asso Compliant Yes	Essment Team III Funding Round Phase Open/A Status + Under A	ssessment 💙
	Funding Round Name S47E	Recommended Funding S47E	Eligible: Ves Score 6	Sub Status * Complei Status Change Date * 10/02/2	te 🗸
	Financial Vear. 2016-2017	Recommended Places/Services	Banding, 1	Shortlisted	~
	Number Submission Date. 24/01/2017 01:21:31 PM	Late Application: On Time	CA Review 2	Funding Round Defaults Checked:	
	Received Date + 24/01/2017	Submission Type Online - External HTM Number of Attachments 3	L 💙	Minute Generated, Minute/Ref Number	
	Application Submission Reference \$47E				
	From the Sub Status dro	p down menu sele	ect Appraisal.		
	Status Details				
	Funding Round Phase: Open/	Appraise			
	Status:* Under	Assessment 🗸			
	Sub Status * Compl	Started	F		
	Status Change Date * Not	anliance			
	Shortlisted. Elia	bility	Change Data ila		
	Check Application: App	raisal	Status Details		
	g Round Defaults Checked: Con	nplete	Funding Round Phase	Open/Appraise	
	Minute Generated Out	standing	Status	Under Assessment	•
	Minute/Ref Number:	orsed	Sub Status:*	Appraisal 🗸	-
		prsed with Changes		la - 2.	-
9	Enter MF in the Ranking	field.			
	MF indicates that a Mod	erator has request	ted a full re-assessment.		
	Note: If the Application h without deleting the exist	as been re-asses ing text and witho	sed multiple times, enter put spaces i.e. QPMF	the next Ranking val	ue
	Appraisal Details		Status Details		
	Evaluation Tea	n. Assessment Team	Funding Round Phase		
	Complian	t Yes 💌	Status *		
	Eligib	e. Yes 👻	Sub Status:*		
	Scol	e; 6	Status Change Date *		
	Bandin		Shortlisted		
	Hankin OA Bevie		Check Application:		
	QA NEVIC	runun	Minute Generated		
			Minute/Ref Number.		
					-

forme Programs Organisations Funding Rou	nds Funding Agreements Milestones Pa	yments Reviews Summaries Geo-Spatial Actions Literature (Contacts Child Care User Preference
Applications All Funding Bounds My Managed F	unding Rounds Registrations DOI Funding R	Rounds Administration	
Program Name * S47E	S Funding Applied For S47E	Compliant Yes	Status * Under As
Funding Round Name + S47E	Recommended Funding S47E	Eligible Ves	Sub Status Appraisa
Registration Id S47E	Places/Services Applied For	Score 6	Status Change Date * 10/02/20
Financial Year 2016-2017	Places/Services	Banding 1	Shortlisted
Number	Application State NSW	Banking QP	Check Application 90
Submission Date 24/01/2017 01:21:31 PM	Late Application On Time		Minute Concreted
Funding Bound Type	Number of Attachments 3		Minute/Bef Number
Application Submission Reference \$47E			
Imagination Paralle		Departmental Contacts	SACS Details
ATE		Last Name S47E	SACS Approval + Not Appl
Legal Entity Id S47E	Provider Id. S4/E	First Name S47E	Legal Entity SACS Award NSW
Legal Entity Name S47E	Provider Name S47E	Phone S47E	Submitted SACS Award
Legal Entity Address. S447 E	Business Name S4/E	Email Address S47E	Override SAC5 Award
Legal Entity Status Active	Business Name from ABR.	Other Applications	SACS Award Override Detai
ABN S47E	Provider Address S47E		SHOS ANNU OVERTILE DELL
Legal Entity Matching Result	Provider Status Active	Another Application Exists in this Puncing Hound IV	SAUS Overnoe Date/ Time
For New Agreements	Matching Result Matched	Anomer Approxion Exists in Ultrerent Funding Hound	SACS OVERDE By
Application Items ABR De	etails – Legal Entity App	lication Description	
Application Items ABR De ABR Details – Provider	etails – Legal Entity App Accreditations App	plication Description	ssing Log
Application Items ABR D	App Accreditations App	plication Description	tion tion History

Steps	Actions							
11	Select the + button.							
	Compliance Criteria Eligibility Eriteria Appraisals Grant Agreement Information Agreement Information Application Financials Application Items ABR Details - Legal Entity ABR Details - Provider Notes							
12	In the Description field enter a note describing why a full re-assessment is required.							
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Application Financial Notes							
	Created Date Created By Type Description							
	14/02/2017 10 ^{s47E} Note The moderator requested a full re-assessment due to							
	04/01/0017/01- CADABA Note							
13	Save the record using Ctrl+S or click the drop down and select Save Record.							
14	Open the FOFMS Task Card Assessing Applications and follow from step 14 until completion.							





FOFMS TASKCARD

Moderating Assessments

This task card will take a Moderator through the process of moderating an assessment and completing in FOFMS.

Contents

Page

Open the Assessment Tool and the Assessment Matrix	2
Moderate the Assessment	9
Finalise the Moderation in FOFMS	14
Log Out of FOFMS	20
Need Help?	20

Before you begin ensure you have:

- The details of the completed assessment that is ready for moderation
 - FOFMS ID
 - o Organisation Name
 - Moderator Guide

FOFMS Access Required:

• FOFMS Funding Round Manager

*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.

Update Instructions For Each Funding Round

- Update Steps 1 and 20 with the appropriate ARC Folder Details
- Add or change steps as required to reflect funding round specific processes

Open the Assessment Tool and the Assessment Matrix



Version Date February 2017

Steps	Actions
2	Open the folder to access the Assessment Matrix and completed Assessment Tool.
	ARC Folder – EF <mark>XX/XXXXXX</mark>
	C C C C C C C C C C C C C C C C C C C
	sortcutz × Search By Matching criteria Favoiles Records Title Word all 2017-933
	Records - IsbekNDCI Assessors - I Record found Records - IsbekNDCI Assessors - I Record found Data Created Data Created Data Created
	Image: Selection and Establishments - 2016-715 - Assessment of Applications 5/09/2016 at 434 PM Image: Selections and Establishments - 2016-715 - Assessment of Applications 5/09/2016 at 434 PM
	My Containers
	Recent Documents
	Saved Saverhar
	User Labels
	Documents checked
2	Open FOFMS to access the Application Record.
3	Click on the Funding Rounds tab
3	Click on the Applications link
	CHACLE File Edit View Navigate Query Tools Help
	Application:
	Home Programs Organisations Funding Rounds Funding Agreements
	Applications All Funding Rounds My Managed Funding Rounds Registration
	My Entered Applications
	✓
	Id Program Name Funding Round I Financial Period Number Submission

Steps	Actions
4	Click on the drop down menu Select My Evaluation Team's Applications.
	Home Programs Organisations Funding Rounds Funding A
	Applications All Funding Rounds My Managed Funding Rounds
	My Entered Applications
	✓ ④
	Id Program Name Funding Round I Financial Period Number
	Home Programs Organisations Funding Rounds Fundi
	Applications All Funding Rounds My Managed Funding Roun
	My Evaluation Teams Applications 🗸
	✓
	d Program Name Funding Round I Financial Period Number
	s47E 2016-2017
5	Click on the drop down menu. Select Id.
	Home Programs Organisations Funding Rounds Funding Agreem
	Applications All Funding Rounds My Managed Funding Rounds Regi
	My Evaluation Teams Applications V
	\checkmark
	Id nd Financial Period Number Su
	Program Name
	Funding Round Name Financial Period 21

Steps	Actions			
6	Enter the Applic	ation Id in the next field	. Click \varTheta .	
	Home Progr	rams Organisations	Funding Rounds	Funding
	Applications	All Funding Rounds	My Managed Funding	Rounds
	My Evaluation	Teams Applications V		
	ld	√ s47E	$\overline{\mathbf{O}}$	
	ld P	Program Name Funding R	ound t Financial Period N	lumber
7	Click on the hype	erlink in the ld column.		
	Home Prog	rams Organisations	Funding Rounds	Funding Agreemen
	Applications	All Funding Rounds	My Managed Funding	g Rounds Registr
	My Evaluation	Teams Applications 💙		
	ld	✓ \$47E	\odot	
	ld F	Program Name	Funding Round Name	Financial Period
	s47E 5	s47E		2016-2017
	<			
7	Id P Click on the hype Home Prog Applications My Evaluation Id Id F	Program Name Funding R erlink in the Id column. rams Organisations All Funding Rounds Teams Applications V S47E Program Name	ound t Financial Period N Funding Rounds My Managed Funding	Funding Agreemer g Rounds Regist Financial Perio 2016-2017

Steps	Actions				
8	A FOFMS application record will	l appear.			
	Confirm that the Application Statu	s is Under Assessme	nt and Sub Status	is Complete	
	 If the QA Review process checked 	has already been com	pleted, the QA Rev	iew flag should be	3
	Update the Evaluation Team field	d to your name.			
	Home Programs Organisations Funding Rounds Funding Agreements	Milestones Payments Reviews Summaries G	eo Spatial Actions Literature Contacts	Child Care User Preferences	
	Applications All Funding Rounds My Managed Funding Rounds Registrations \$47E	s DOI Funding Rounds Administration		+ Q 🗴 4 teit- 🕨	2
	Application Details	Appraisal Details		Status Details	
	Id & S47E Primary Contact	s47E	Evaluation Team Moderator \$47E × 👁	Funding Round Phase Open/Appraise	
	Program Name + S47E Funding Applied For	s47E	Compliant Yes	Status • Under Assessment	~
	Registration Id S47E		Score 8	Status Change Date + 10/02/2017	m
	Financial Year 2016-2017 V Recommended Places/Services		Banding 1	Shortlisted	~
	Number Application State	NSW 🗸	Ranking QP	Check Application	
	Submission Date: 24/01/2017 01:21:31 FM Late Application	Con Time	QA Review: 🗠 Funding F	Round Defaults Checked:	
	Funding Round Type:	3		Minute/Ref Number	
	Application Submission Reference 847E				
	Appraisal Details		Status Details		
	Evaluation Team:	Moderator ^{\$47E} X 🔍	Funding Round Phase	Open/Applese	
	Compliant	Yes	Status ★	Under Assessment	~
	Eligible	Yes 💙	Sub Status:★	Complete	~
	Score	6	Status Change Date *	10/02/2017	2
	Banding	1	Shortlisted		~
	Ranking	QP	Check Application	\leq	
	QA Review.	✓ Funding	Round Defaults Checked		
			Minute Generated	[]	
			Minute/Ref Number		
S.					

Actions											
Click on	the At	tach	mer	nts tab							_
								-			
Note: If y	ou ca	nnot	viev	v the Attac	nme	nts tab,	select Attachments	from the	e arop aov	NN IIST.	
fome Programs	Organisations	Funding P	Rounds	Funding Agreements	Milestones	Payments R	eviews Summaries Geo-Spatial Actions Lite	erature Contact	s Child Care User F	Preferences	
Applications All Fur	ding Rounds	My Manage	d Fundin	g Rounds Registrations	DOI Fun	ding Rounds Admi	nistration			-	
Progra	Name \$47		100	Funding Applied Enr	s47E s47E		Compliant Ver		Status +	Inder Assessme	
Funding Rour	d Name + S47		m	Recommended Funding	s47E		Eligible Ves	~	Sub Status +	Appraisal	~
Regio	tration ld \$47		1	Places/Services Applied For			Score 6	100	Status Change Date *	18/02/2017	00
Finar	ncial Year. 2016-	017	~	Recommended			Banding 1		Shortlisted		~
	Number			Application State	NSW	~	Banking CP		Check Application	7	150
Submis	sion Date 24/01	2017 01 21 31	PM	Late Application	On Time	~	QA Review 🗵	Funde	ig Round Defaults Checked		
Heceis	ed Date 4 24/01	2017	m	Submission Type .	Online - Exte	ernal HTML 💌			Minute Generated		
Funding Ro	und Type		~	Number of Attachments	3				Minute/Ref Number		
Application Submission F	Reference S47	2									
)rganisation Detail	1						Departmental Contacts		SACS Details		
	s47				s47F	-	Last Name S47E	ত্র	SACS Approval *	Not Applicable	~
Lega	eA7	-	100	Provider Id	-475	1	First Name S47E		Legal Entity SACS Award	NSW	~
LegalEnt	s47F		131	Provider Name	547E	(5)	Phone s47E		Submitted SACS Award		~
Legal Entity	r Address.	•	(9)	Business Name	541E		Email Address S47E		Override SACS Award		~
Lagal Enti	ity Status Active			Business Name from ABR	2		Other Applications		CACE Award Orenvie	de Detaile	1
	ABN S47	1.1		Drauddor Addraga	CATE.	100	other Applications		SACS AMBU OVERIN		
				Provider Address.	54/C					Barr	
Le Matchi	gal Entity Ing Result Match	ed	~	Provider Status	Active		Another Application Exists in this Funding Round N		SACS Override Date/Time		12
Le Matchi Legal Entity For New Ag	gal Entity Ing Result Blocked reaments	ed	*	Provider Status Provider Status Provider Matching Result	Active Marched	Ar	Another Application Exists in this Funding Round N		SACS Override Date/Time SACS Override By		
Le Madal Entity For New Ag Current Agneeme Compliance Criteria	gal Entity Match ng Rosult Blocked reaments ent Exists ? Eligibility Crite	ed La Apprar	 ♥ sals G	Provider Status Provider Matching Result Provider Blocked For New Agreement Informatic	Active Matched	Arment Information	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round X Application Financials Application Items ABR I	Det <mark>u is – Legal Entr</mark>	SACS Override Date/Time SACS Override By SACS Override Reason ty Application Descrip	stian 🖌	•
Le Legal Entity Eor New Ag Current Agreenw Compliance Criteria	gel Entity Ing Result Match Blocked ent Exists ? Eligibility Enter	Apprair	sais c	Provider Status Provider Status Matching Beaut Provider Blocked Per New Agreement Information	Active Maxched an Agreed	ment information	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round V Application Financials Application Items ABR I	Det. Is – Legel Ent	SACS Override Date/Time SACS Override By SACS Override Reason ty Application Descrip	etion 🗸	•
Legal Entity For New Ag Current Agreenw Compliance Criteria	Items	Apprair	sals C	Provider Status Provider Matching fiscult Matching fiscult Matching fiscult Matching fiscult Matching fiscult Per New Agreement Information For New Agreement	Active Macched an Agreed	ment information	Another Application Exists in this Funding Round N. Nother Application Exists in Different Funding Round V. Application Financials Application Items ABR I Description	Detuis – Legel Ent	SACS Override Date/Time SACS Override By SACS Override Reason ty Application Descrip	vition	•
L Legal Entity Eor New Ag Current Agreenw Compliance Criteria	gel Entity Ing Recut Blocked Internet State Eligibility Corte	ABR	× sais c	Provider Status Provider Matching Result Provider Blocked For New Agenemets Stant Agreement Informatio	Active Marched an Agreer	ment information	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round X Application Financials Application Items ABR I Description	Det. In - Legal Ent	SACS Override Date/Time SACS Override By SACS Override Reason	vion V	•
L Legal Entity For New Ag Current Agreems Compliance Chiteria Appplication	Items	ABR	v sals c Detai	Provider Status Provider Status Provider Stocode Previder Stocode Pervider	Active Marched an Agreed	Application	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round X Application Financials Application Items ABR I Description	Det. II Legal Ent	SACS Override Date/Time SACS Override Reason SACS Override Reason ty Application Descrip	stion y	•
L Legal Entity For New Ag Current Agreem Compliance Chiteria Appplication	Items	ABR	vals c	Provider Status Provider Matching Neult Provider Blocked For New Agasments Internat Agreement Information For New Agasments Information For Provider Blocked For New Agasments Provider Blocked For New Agasments For New A	Active Marched an Agreen	Application I	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round X Application Financials Application Items ABR I Description	Det Enterna	SACS Override Date/Time SACS Override Reason SACS Override Reason ty: Application Descrip	stion y	
L G Materia Legal Entity For New Ag Current Agneem Compliance Chiteria Appplication	gelEntity Manch ng Recut Manch Blocked In Blocked In Blocked I Blocked Eligibility Crite I Items	ABR	v sals c	Provider Status Provider Matching Nesult Provider Blocado Far New Agasement Information Part New Agasement Information Far New Agasement Information Far New Agasement Provider Blocado Far New Agasement Provider P	Active Marched an Agreen	Application	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round X Application Financials Application Items ABR I Description	Det s - Legel Ent	SACS Override Date/Time SACS Override Reason 57 Application Descrip	nion y	
L Generation of the second sec	gelEntity Manch ng Recut Manch Blocked reamons Eligibility Crite I Items	ad Apprai	vais c	Provider Status Provider Wooder Matching Nesult Provider Blooded Per New Agasement Information Per New Agasement Information Per New Agasement Information Per New Agasement Provider Blooder Per New Agasement Provider Blooder Provider Blooder Provider Provider Blooder Provider Provider Blooder Provider	Active Marched an Agleer	Application	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round V Application Financials Application Items ABR I Description	Det in - Legel Enti	SACS Override Date/Time SACS Override Reason SACS Override Reason Ty: Application Descrip	non V	
L Legal Entity For New Ag Current Agreem Compliance Chitera Application	gelEntity Manch ng Recut Manch Blocked reamons 2 Eligibility Crite 1 Items	ABR	v Detai	Provider Status Provider Status Provider Bloaded Pre New Agaramets Information Pre Status President Status President Status President Status President Status President Status President Status Provider Status Status Provider Status Provider Status Provide	ty Ap	Application	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round V Application Financials Application Items ABR I Description	Det in - Legal Enti	SACS Override Date/Time SACS Override Reason SACS Override Reason Ty: Application Descrip	non V	•
L Legal Entity For New Ag Current Agreem Compliance Chitera Appplication	gelEntity Mance Ing Receits Blocked reamons Control Control Eligibility Conte I Items	ABR	Detai	Provider Status Provider Status Provider Biologi Per New Agaramets Information Per New Agaramets Information Per New Agaramets Information Per New Agaramets Provider Biologi Per New Agaramets Per New Aga	Active Marched an Agleer	Application	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round N Application Financials Application Items ABR I Description S Construction Description Contaction Description Contacts Contacts Contacts Contact	Det II - Legel Ent	SACS Override Date/Time SACS Override Reason 5/C Application Descrip	non V	•
L Legal Entity For New Ag Current Agreem Compliance Chitera Appplication	gelEntity Mance Ing Recent Bocked reamons Control Control Eligibility Conte I Items	ABR	Detai	Provider Status Provider Status Provider Bloaded Pre New Agaramets Information Pre New Agaramets Information Pre New Agaramets Information Pre New Agaramets Provider Bloaded Pre New Agaramets Provider Bloaded Provider Bloaded P	ty Ap	Application	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round N Application Financials Application Items ABR I Description S Constants Doundaries Contacts Coverage Document Prod	Det II - Legal Ent	SADS Override Date/Time SADS Override Reason SADS Override Reason Type Application Descrip	non V	•
L Legal Entity For New Ag Current Agneem Compliance Chiters Application	Is - Prov	ABR	Detai	Provider Status Provider Status Provider Bloaded Pre New Agenemets Information Pre New Agenemets Information Pre New Agenemets Information Pre New Agenemets Information Pre New Agenemets Information Provider Bloaded Provider Bl	ty Ap	Application I	Another Application Exists in this Funding Round N worther Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Application Description Application Description Application Description Application Description Application Description Contacts Contacts Contacts Coverage Document Proo Document Proo Document Proo Free Sets	Det II - Legal Ent	SADS Override Date/Time SADS Override Reason SADS Override Reason Type Application Descrip	nich 🔽	•
L Legal Entity For New Ag Current Agreem Compliance Chitera Application	Is - Prov	ABR	Detai	Provider Status Provider Matching Result Provider Bloaded Par New Agaraments Information Par New Agaraments Information Par New Agaraments Information Provider Bloaded Provider	ty Ap	Application	Another Application Exists in this Funding Round N nother Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Application Description Application Description Appl	Det II - Legal Ent	SADS Override Date/Time SADS Override Reason SADS Override Reason Type Application Descrip	nich 🕅	•
L Legal Entity For New Ag Current Agreem Compliance Chiters	Items	ABR	Detai	Provider Status Provider Stotas Matching Result Provider Blooded Par New Agenemets Information Par New Agenemets Information Par New Agenemets Information Par New Agenemets Information Informatio Information Information In	ty Ap	Application	Another Application Exists in this Funding Round N nother Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Description Application Description Application Description Application Description Contaction Description Contacts Contacts Contacts Coverage Document Proo Fee Sets Notes Organisation D	Det E + Legel Ent	SADS Override Date/Time SADS Override Reason SADS Override Reason Type Application Descrip	nich 🕅	
L Legal Entity For New Ag Current Agreem Compliance Chiters	Is Prov	ABR	Detai	Provider Status Provider Status Matching Result Provider Blooded Par New Agaments Internat Agreement Informatio	ty Ap	Application	Another Application Exists in this Funding Round N exter Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Application Description Application Description Places/Service Application Description Application Description Places/Service Application Description Application Description Applica	Det E + Legal Ent	SADS Override Date/Time SADS Override Reason SADS Override Reason Type Application Descrip	nich 🕅	
L Legal Entity For New Ag Current Agneem Compliance Chitera Application	Items	ABR	v Detai	Provider Status Provider Matching Result Provider Blooded Par New Agenemets Information is - Legal Entities	ty Ap	Application	Another Application Exists in this Funding Round N nother Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Description Application Exists in Different Funding Round N Application Financials Application Items ABR I Application Financials Application Items ABR I Constants Double Attachments Double Attachments Double Attachments Double Attachments Contacts Contacts Contacts Contacts Reviews Corganisation D Places/Service Reviews Double Attachments Double	Det E + Legal Ent	SADS Override Date/Time SADS Override Reason SADS Override Reason Type Application Descrip		
L Garden Lagged Entity For New Ag Current Agneem Compliance Chitera Application	gelEntity Ing Recturd Blocked Int Exists Ø Eligibility Crite Isigibility Crite	ABR	V Detai	Provider Status Provider Matching Result Provider Blooded Par New Agenemets Information istant Agreement Information istant Agreement Information correctitations	ty A	Application I	Another Application Exists in this Funding Round N nother Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Description Application Exists in Different Funding Round N Application Financials Application Items ABR I Application Financials Application Items Application It	duction duction Hi bescription	SADS Override Date/Time SADS Override Reason gr Application Descrip		
Lucyal Entity For New Ag Current Agreem Compliance Criteria Application	gelEntity Ing Recturd Blocked Inf Exists Ø Eligibility Crite Isigibility Crite	ABR	Detai	Provider Status Provider Matching Result Provider Blooded For New Agenemits Intern Agreement Information is - Legal Entit	Apreside the second sec	Application I	Another Application Exists in this Funding Round N nother Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Description Application Exists Application Items ABR I Application Financials Application Items Abrillion Application Financials Application Items Applicati	duction duction Hi Description s ded ent	SADS Override Date/Time SADS Override Reason gr Application Descrip		
L Legal Entity For New Ag Current Agneem Compliance Chitera Application	gelEntity Ing Rectuit Blocked In Exists Ø Eligibility Crite	ABR	V Detai	Provider Status Provider Matching Result Provider Blooded Par New Agenemets Information is - Legal Entil	ty Ap	Application	Another Application Exists in this Funding Round N nother Application Exists in Different Funding Round N Application Financials Application Items ABR I Description Description Application Exists in Different Funding Round N Application Items ABR I Application Financials Application Der Attachments Doundaries Contacts Contacts Coverage Document Provi Fee Sets Notes Organisation D Places/Service Reviews Services Provi Risk Assessme Status History Tarret Groups	Det Exceeded and a constraint of the second	SADS Override Date/Time SADS Override Reason SADS Override Reason (7) Application Descrip		
Steps	Actions										
-------	--	---	-----------------	-------------------	----------------	--					
10	Click on the Receipt hyperlink to open a copy of the Application Form.										
	Compliance Criteria	Eligibility Criteria	Appraisals	Grant Agreemer	nt Information						
	Attachments	5									
		~	0	\odot							
	Attachments Na Docum	ent Type Size(In Bytes)	Туре	Modified	Local						
	s47E Applica	ation Form 11,042	xlsx	24/01/2017 01:	. Y						
	Receipt	375,404	pdf	24/01/2017 01:	. Y						
	This may also appear	as DSS Standard Fo	rm Release 2.								
	Attachments Name										
	USS Standard Form Relea	ise 2									
11	If required, open other	attachments by selec	ting the approp	oriate hyperlink.							
12	The following box will	open Click Download	d then Onen								
	File Deverlaged		a, alen open.								
	File Download	~									
	You are downloading the file like to edit the file directly or computer?	'Receipt.pdf'. Would you download it to your									
	Edit button is disabled as Siebe Desktop Integration Siebel Age	el was not able to connect to nt.									
	Edit	Download Cancel									
	Do you want to open or save Receip	nt.pdf from dssgrants.gateway.internal?		Open	ave 👻 Cancel 🗙						

Moderate the Assessment

Actions
Moderate the assessment by following the Taskcard – Moderator Guide and the Moderator Workbook located in your User Labels in ARC. NOTE: See Step 1 for how to access User Labels. If your User Labels are not set up, please speak with your Team Leader.
HP Records Manager Epie Edit View Search Loois Administration Window Help
Q Q
Shortouts × Search For Search By Marching criteria Favotas @ Records * Title Word * @ 2017-933 * E C
My Containers
Recent Documents
Saved Searches
E User Labels
Documents checked out
Report Number of VINI6/2009
If you AGREE with the assessment go to step 20.
If you DO NOT AGREE with the assessment go to step 15.

s47E	ation	Tean	i neiu, sei		e giypii						2 2 1/km	140
						1 0 00 00			_	+ 4 4	9 N 1017	
pplication Details			That is the state of the			Appraisal Detail	s			Status Details	No	
ld •	\$4/E		Primary Contact	S4/E			Evaluation T	aam Assessor S47E	× 🖻	funding Round Phase	Open/Appraise	1.2
Program Name •	047E	801	Funding Applied For	\$47E			Comp	1	1.5	Status *	Under Assessment	~
Funding Round Name:	547E	1	Recommended Funding	\$47E			Elig	ible Ves		Sub Status 🖌	Complete	-
Registration id	54/ C	154 7	Places/ services Applied For Recommended				2	COF9. Q		Status change bate *	10/02/2017	- u
Pinancial Year.	2010-2017		Places/Services	10514	~		Ban	ang t	-	Charle Application	28	
Submission Date	74/01/2017 01:21:	31 PM	Application state	On Time	~		OA Be	naw W	Eunding	Bound Defaults Checked		
Becaused Date •	24/01/2017		Submission Type +	Online - External	нти 👻				(construct	Minute Generated	п	
Funding Round Type		~	Number of Attachments	3						Minute/Ref Number	1	
in the Colorest Colorest	s47E											
Apprai	sal Det	ails						\checkmark				
Apprai	sal Det	ails	Evaluation	n Team	Asses	sor ^{s47E}	×	I I				
Apprai	sal Det	ails	Evaluation	n Team npliant	Asses: Yes	s47E	×					
Apprai	sal Det	ails	Evaluation Cor	n Team npliant Eligible	Assess Yes Yes	SOF ^{S47E}	×	2				
Apprai	sal Det	ails	Evaluation Cor	n Team npliant Eligible Score	Assess Yes Yes 6	sor ^{s47E}	× [
Apprai	sal Det	ails	Evaluation Cor I	n Team npliant Eligible Score anding	Assess Yes Yes 6 1	sor ^{s47E}	× []					

Steps	Actions										
16	A list of the available Moderators and Assessors will be displayed.										
	Highlight the appropriate Assessor and select OK.										
	Note:										
	 A partial re-assessment cal original assessment. 	n be completed by the same assessor who conducted the									
	- A full re-assessment will be completed by a different assessor										
	C										
	Pick Evaluation Team	×									
	Query	1 - 10 of 20									
	1										
	Name	Description									
	Accessor	s47E									
	Assessor s47E	Assessor stre									
	Assessor \$47E	Assessor s47E									
	ti Assessor ^{s47E}	Assessor ^{\$47E}									
	Assessor s47E	Assessor s47E									
	Assessor s47E	Assessor I ^{s47E}									
	Assessor ^{s47E}	Assessor S47E									
	3 Assessor s47E	Assessor s47E									
	Assessor ^{84/E}	Assessor SAVE									
	Realiant Page	Provinue Record - Next Record - Next Parts									
	M Frevious Fage	H Previous Record III Next Record III Next Page									
	r.	OK Cancel									
		i nst tvanic.									



Steps	Actions
18	0
	Save the record using Ctrl+S or click the drop down and select Save Record.
	Home Programs Organisations Funding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Contacts Child Care User Preference Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding Rounds Administration
	s47E + 9 *
	Apprication octails Status Details Status Details Status Details Status Details Status Details Composition of the status Details Status Details and the status Details Status Details and the status Details a
	Broarium Numinia \$47E The Exampliant Exer \$47E Promisional Van Statution 4 Hadre :
	+ Q 🌣 1 of 1+
	Status Undo Record [Ctrl+U]
	Delete Record [Ctrl+D]
	S Fundi New Record [Ctrl+N]
	Copy Record [Ctrl+B]
	Save Record [Ctrl+S]
	Statu New Ouery [Alt+0]
10	
19	Open and complete the Moderator – Partial Re-assessment email template to notify
	the original assessor that the assessment is ready for partial re-assessment.
	 The Assessor should follow the steps in the FOFMS Task Card – Partial Re- assessment.
	If a full re-assessment is required:
	 Open and complete the Moderator – Full Re-assessment email template to notify the new assessor that the assessment is ready for a full re-assessment
	 The Assessor should follow the steps in the FOFMS Task Card - Full Re-assessment.
	Ean annail tannalatan nafar tar
	ARC Folder – EF16/392360 – D16/7538081
20	Open the Moderator Workbook located in your User Labels in ARC.
	ARC Folder – EFXX/XXXXXX
	NOTE: See Step 1 for how to access User Labels. If your User Labels are not set up, please speak with your Team Leader
	Update the Moderator Workbook.
	Close all documents in ARC.
21	Once a full re-assessment and QA or partial re-assessment and QA have been completed, the re-assessment will need to be moderated again.

Finalise the Moderation in FOFMS

	Apprais	al record	S.				 A state of a state o				
	Home Pro	grams Organis	sations Fund	ling Rounds	Funding Agreements	Milestones	Payments Re	eviews Summaries G	eo Spatial Actio	ons	
5	Applications	All Funding Ro	unds My Ma	inaged Fund	ing Rounds Registrations	DOI Fun	ding Rounds Admir	nistration			
	Application	Details	-			-475		Appraisal Details	8	-	
		Ida	\$47E		Primary Contact	\$47E			Evaluation Team	n: A	
		Program Name	-47F	٩	Funding Applied For	\$47E			Compliant	t. Y	
	Fur	nding Round Name	\$47E	9	Recommended Funding	547E			Eligible	e: Y	
		Registration Id	\$4/E	ব	Places/Services Applied For				Score	: 6	
		Financial Year	2016-2017	~	Places/Services				Banding	1	
		Number	5		Application State	NSW	~		Ranking	Q	
		Submission Date	24/01/2017 01	:21:31 PM	Late Application	On Time	~		QA Review	. 7	
		Received Date	24/01/2017	2	Submission Type:	Online - Exte	ernal HTML 💙				
	F	Funding Round Type	6	~	Number of Attachments	3					
	Application Su	bmission Reference	s47E								
	Organisatio	n Details						Departmental Co	ontacts		
		Legal Entity Id	s47E		Provider Id.	s47E			Last Name	S	
		Legal Entity Name	s47E	ব	Provider Name	s47E	3		First Name	F	
		Legal Entity Address	s47E	E]	Business Name	\$47E			Phone	: 0	
		Legal Entity Status	Active		Business Name from ABR	2			Email Address	F	
		3 3 100	s47F			s47E	-	Other Applicatio	ns		
		ADN			Provider Address		<u> </u>	Another Application Exists i	n this Funding Bound	1 1	
		Matching Result	Matched	*	Provide <mark>r</mark> Status	Active					
	F	egal Entity Blocked or New Agreements			Provider Matching Result	Matched	✓ An	IOTHER Application Exists in Din	erent running kound		
	Curre	nt Agreement Exists			Provider Blocked For New Agreements						
	Compliance	Criteria Eligibil	ity Criteria	nnraisals	rant Accement Informatio	Agree	ment Information	Application Financials	Application Items		
	Completion	uncerta congrou		platerer	The R. Phys. Control of the second second	in ingree		- Application - Internation	representation		
	<u>↓</u>										
	Comiero	Eligib	lity Critena	Appraisals	Grant Agreement Informa	ation Agr	eement Informatio	on Application Financial	s Application Ite	em	
				- A.C.							
	Apprais	sals									
		~			•						
	Use as Final	Appraisal Type	Appraiser Last N	ame Appraise	er First Name Status	Score	Banding				
	7	Assessment	s47E		Completed	5	1				
		Assessment	Administrator	s47E	Baseline						

Steps	Actions								
23	Highlight the appraisal record ticked Use as Final . Ensure the Status is Completed and a Score has populated.								
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Application Fin								
	Appraisals								
	Use as Final Appraisal Type Appraiser Last Name Appraiser First Name Status Score Banding								
	Assessment s47E Completed 5 1								
	Assessment Administrator s47E Baseline								
24	Click and select Copy Record.								
	ABR Details – Legal Entity ABR Details – Provider Accreditations								
	🕂 🔍 🍄 2-4 of 4 🖍								
	Lindo Becord [Ctrl+1]								
	Delete Record (Ctrl+D)								
	New Record [Utrl+N]								
	Copy Record [Ctrl+B]								
	Save Record [Ctrl+S]								
	New Query [Alt+Q]								
	Run Query [Alt+ENTER]								
25	A new assessment line will appear.								
	Tick Use as Final.								
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Applicat								
	Appraisals								
	 ✓ ✓ 								
0	Use as Final Appraisal Type Appraiser Last N Appraiser First N Status Score Banding								
	Not Started								
	Assessment Administrator S47E Baseline								

Steps	Actions										
26	From the Appraisal Type drop down menu select Moderated.										
	Use as Final	Appraisal Type	Appraiser Last Name	Appraiser First Name	Status	Sc					
			•		Not Started						
		Assessment									
	<	Moderated OA Review									
	L.										
27	In the Appraiser L	.ast Name field, c	lick the glyph								
	isals										
	~		•								
	Appraisal Type	App <mark>raiser Last Na</mark>	me Appraiser First Na	me Status	4						
	Moderated		9	Not Started							
	Assessment Administrator Baseline										
	Pick Employee	e 💙	•	X 1-10 of 10+							
	Last Name First Name Login Position Job Title										
	s47E	FaCS App	-								
8	<u>.</u>										
		<u> </u>									
			\mathbf{N}								
	III Prev	ious Page 🔫 Previous Record Ne	ext Record III Next Page	Cancel							
	OK										

Steps	Actions
29	Change the Status to In Progress.
	Aisals Appraisal Type Appraiser Last N Appraiser First N Status Score Moderated Assessment Administrator ***********************************
30	Save the record using Ctrl+S or click the the record using Ctrl+S or click the the record using Ctrl+S or click the the record to particle the record to be the record to
31	Highlight the moderator appraisal record ticked Use as Final with the status In Progress.
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information
	Appraisals
	 ✓
	Use as Final Appraisal Type Appraiser Last Name Appraiser First Name Status
	Moderated S47E In Progress

Steps	Actions										
32	Change the status from In Progress to Completed.										
	Complianc	e Criteria E	ligibility Criteria	Appraisals	Grant Agreement Information Agreement Information						
	Appraisals										
		~		(€						
	Jse as Final	Appraisal Ty	pe Appraiser Last	Name Appraiser	First Name	Status	Score	Banding			
		Moderated	s47E			In Progress	~				
						Completed Withdrawn	1				
						Baseline					
33	Entoryou	r nomo in t	Dopartmon	tal Contact	e contion	by coloctin	a tho al		act		
	Name field	d.	le Departmen	ital Contact	S Section	by selecting	g the gi	ypn — in the L	ası		
	s47E							+ Q 😫 4 taf	• • ·		
	Application Details	-1174-4-1		2	Appraisal Detai	ils		Status Details			
		Id • \$47E	Primary Contact	47E		Evaluation Team Assess	ment Team	Funding Round Phase Open/Appraise			
	Program	Name + S47E	Funding Applied For	s47E		Compliant Ves	×	Status A Under Assessme	nt 🚩		
	Functing Round	Name s47 E	Recommended Funding S	47E		Eligible Yes	*	Sub Status + Complete	~		
	Registre	ation ld S47E	Places/Services Applied For			Score 6		Status Change Date + 10/02/2017	23		
	Financi	al Year 2016-2017	Recommended Places/Services			Banding 1		Shortlisted	~		
	N	lumber:	Application State	i5w 💙		Ranking QP	1	Check Application			
	Submissio	n Date 24/01/2017 01:21:31	M Late Application	m Time 👻		QA Review 🗹	Fundi	ng Round Defaults Checked: 🗌			
	Received	Date • 24/01/2017	3 Submission Type .	Inline - External HTML				Minute Generated			
	Funding Roun	d Type	Number of Attachments					Minute/Ref Number	1		
	Application Submission Ref	erence s47E									
	Organiantian Dataila			d'	Departmental	Contacts		SACS Details			
	organisation Details				10.08.000000000000000000000000000000000		-				
	Legal E	ntity Id: S47E	Provider Id	4/E		Last Name	26	SACS Approvar + Not Appricable			
	Legal Entry	Name S47E	Provider Name S	47E 🗊		First Name		Logal Entity SACS Award NSW	×		
	Legal Entity A	ddress S47E	Business Name S	47E		Phone		Submitted SACS Award	×		
	Legal Entity	Status Active	Business Name from ABR.	6		Email Address		Override SACS Award	~		
	Departmental Contacts										
			Last	Name]				
			First	Name:							
				Phone:							
			Email Ac	idress:							

Steps	Actions		
34	A pop-up box Highlight you Your name w Pick En	x will open. In the Starting with field enter the Moderator last name and select ir name in the list of results and click OK . vill be recorded as the Departmental Contact. nployee	 ● ×
	٩	Last Name V S47E 1 - 10 of	12+
	Last Name	First Name Login Position Job Title	
	s47E	FaCS App DSS Application Appraiser	
		Previous Page Previous Record Next Record Next Page Next Page OK Cance	el

Steps	Actions	Actions						
35	Save the record u	sing Ctrl+S or click the	drop down and select Save Record. Reviews Summaries Geo Spatial Actions Literature Contacts Child Care User Preferen					
	Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding Rounds Administration 847E							
	Apprication creans (d + \$47E Brooman Marine & \$47E	Frimary Contact S47E Examiner Applied Ear S47E	Appraisal Details Status Details Evaluation Team Assessment Team Total and Phase Open/# Premolinat Vor Status Details Under #					
	+ Status C Fundi Ve	Q 🌣 1 of 1+ do Record [Ctrl+U] lete Record [Ctrl+D] ew Record [Ctrl+N]						
	Co Sa Statu Ne Ru	py Record [Ctrl+B] ve Record [Ctrl+S] w Query [Alt+Q] in Query [Alt+ENTER]						

Log Out of FOFMS

Steps	Actions								
36	To log out of FOFM	IS select	File th	en Log	O <mark>ut or use</mark>	shortcut	Ctrl+Shi	ft+X.	
	ORACLE	File	Edit	View	Navigate	Query	Tools	Help	Co Search
	A A 2 ~ O .	Creat	Create Bookmark						
	Home:	Log Out [Ctrl+Shift+X]							

Need Help?

For further assistance please speak to your Team Leader.







FOFMS TASKCARD

Quality Assurance (QA) Review

This task card will take you through the process of completing a QA review of an assessed application in FOFMS.

Contents

Page

Open the Assessment Tool and the Assessment Record	2
Undertake QA of Assessment Tool and Assessment Record	7
Update Workbook/Notify Assessor	13
Need Help?	14

Before you begin ensure you have:

- The details of the completed assessment that is ready for a QA review
 - FOFMS ID
 - o Organisation Name

FOFMS Access Required:

• FOFMS Funding Round Manager

*If at any step you feel you have made an incorrect selection, press 'Esc' and attempt the step again. If this fails to resolve the issue, speak to your Team Leader.

Update Instructions For Each Funding Round

- Update steps 1 and 21 with the appropriate ARC Folder Record Number
- Add or change steps as required to reflect funding round specific processes

Open the Assessment Tool and the Assessment Record

Steps	Actions							
1	Open ARC to access the completed Assessment Tool.							
	ARC Folder – EF <mark>XX/XXXXXX</mark>							
	The naming convention for the Assessment Tool will be							
	FOFMS ID – Organisation Name - Assessment							
2	Open FOFMS to access the Assessment Record.							
3	Select the Funding Rounds tab and select the Applications link.							
	ORACLE' File Edit View Navigate Query Tools Help							
	Application:							
	Home Programs Organisations Funding Rounds Funding Agreements							
	Applications All Funding Rounds My Managed Funding Rounds Registration							
	My Entered Applications							
	My Entered Applications							
	\checkmark							
	Literation Device Function Deviced Financial Deviced Number 20 Submission							
	Id Program Name Funding Round I Financial Period Number Submission							

Steps	Actions
4	Click on the drop down menu Select My Evaluation Team's Applications .
	Home Programs Organisations Funding Rounds Funding A
	Applications All Funding Rounds My Managed Funding Rounds
	My Entered Applications
	Id Program Name Funding Round I Financial Period Number
	Home Programs Organisations Funding Rounds Fundi
	Applications All Funding Rounds My Managed Funding Roun
	My Evaluation Teams Applications V
	✓
	d Program Name Funding Round I Financial Period Number
	47E 2016-2017
5	Click on the drop down menu. Select Id
	Home Programs Organisations Funding Rounds Funding Agreem
	Applications All Funding Rounds My Managed Funding Rounds Regi
	My Evaluation Teams Applications V
	Program Name
	Funding Round Name 22
	Financial Period si 2016-2017 21

teps	Actions					
6	Enter the Application Id in the next field. Click .					
	Home	Programs	Organisations	Funding Rounds	Funding	
	Applicati	ions All Fu	nding Rounds	My Managed Fundin	g Rounds	
	My Eval	luation Teams /	Applications 🗸			
	Id		✓ \$47E]	
	ld	Program	Name Funding Ro	ound I Financial Period	Number	
	The applic	cation record v	vill open.			
	Click on th	ne hyperlink i	n the Id column to	o open the Application	Record.	
	Home	Programs	Organisations	Funding Rounds	Funding Agreemen	
	Applicat	tions All Fu	Inding Rounds	My Managed Fundin	ig Rounds Registr	
	My Eva	luation Teams	Applications 🗸			
	ld		✓ \$47E	•		
	ld	Program	Name	Funding Round Name	Financial Period	
	s47E	s47E			2016-2017	
	<					

			+ 9 0 1
plication Details		Appraisal Details	Status Details
Id * S47E	Primary Contact S47E	Evaluation Team Assessment Team [Funding Round Phase Open/Appra
Program Name * S47E 30	Funding Applied For: S47E	Compliant Yes	Status * Under Asses
Funding Round Name + S47E	Recommended Funding S47E	Eligible Yes	S o Status * Complete
Registration Id S47E	Places/Services Applied For	Score 6	Status Menge Date + 10/02/2017
Financial Year 2016-2017 👻	Recommended Places/Services	Bending 1	Shortlisted
Number	Application State NSW	Ranking QP	Check Application
Submission Date 24/01/2017 01:21:31 PM	Late Application On Time	QA Review	ning Round Defaults Checked: 🗔
Received Date.* 24/01/2017	Submission Type * Online - External HTML		Minute Generated. 🗔
Statua Dataila			
Funding Round Phase	Open/Appraise		
Status:*	Under Assessment	~	
		~	
Sub Status:*	Complete		
Sub Status * Status Change Date *	Complete		
Sub Status * Status Change Date * Shortlisted	Complete 10/02/2017		
Sub Status * Status Change Date * Shortlisted Check Application:	Complete 10/02/2017		
Sub Status * Status Change Date * Shortlisted Check Application Round Defaults Checked	Complete 10/02/2017		
Sub Status * Status Change Date * Shortlisted Check Application Round Defaults Checked Minute Generated	Complete 10/02/2017		
Sub Status * Status Change Date * Shortlisted: Check Application: Round Defaults Checked Minute Generated	Complete 10/02/2017		

Steps	Actions						
8	Check the Applicatio	n Submission Ty	/pe.				
	If the Submission Ty	pe is ' Manual' dis	cuss the process	with your Tear	m Leader	•	
	\$47E						
	Application Details					Appraisal Details	
	Id.*	s47E	Primary Contact	s47E			E
	Program Name *	s47E ' 🔄	Funding Applied For	s47E			
	Funding Round Name:	s47E	Recommended Funding	s47E			
	Registration Id	s47E	Places/Services Applied For				
	Financial Year	2016-2017 💙	Recommended Places/Services				
	Number		Application State	NSW	~		
	Submission Date.	24/01/2017 01:21:31 PM	Late Application	On Time	~		
	Received Date *	24/01/2017	Submission Types	Online - External HTML	~		
	Funding Round Type	~	Number of Attachments	3			
	Primary Contact:	47E		/			
	Funding Applied For:	s47E		/			
	commended Funding:	s47E					
	'Services Applied For:						
	Recommended Places/Services						
	Application State:	NSW	~				
	Late Application:	On Time	~ /				
	Submission Type:*	Online - External H1	ſML 💙				
	mber of Attachments:	3					

Undertake QA of Assessment Tool and Assessment Record

Steps	Actions					
9	Select the Apprais	als tab and scro	oll down to the A	ppraisal records	S.	
	Home Programs Organis	ations Funding Rounds	Funding Agreements	Milestones Payments	Reviews Summaries Geo Spatial Actio	ins
	Applications All Funding Rou	unds My Managed Fund	ing Rounds Registrations	DOI Funding Rounds A	dministration	
	Application Details	- 100-			Appraisal Details	_
	ld *	s47E	Primary Contact	s47E	Evaluation Team	Ast
	Program Name 🖈	\$47E	Funding Applied For:	s4/E	Compliant	Yes
	Funding Round Name *	\$47E	Recommended Funding	s47E	Eligible	Yes
	Registration Id	s47E	Places/Services Applied For		Score	6
	Financial Year	2016-2017	Places/Services		Banding	1
	Number		Application State	NSW	Ranking	QP
	Submission Date	24/01/2017 01:21:31 PM	Late Application	On Time 💙	QA Review	
	Received Date *	24/01/2017	Submission Type *	Online - External HTML		
	Funding Round Type	A7E	Number of Attachments	3		
	Application Submission Reference	547E				
	Organisation Details				Departmental Contacts	
	Legal Entity Id	s47E	Provider Id	s47E	Last Name	s47
	Legal Entity Name	's47E	Provider Name	s47E	First Name	s47 ⊑
	Legal Entity Address	s47E	Business Name	s47E	Phone	02
	Legal Entity Status	Active	Business Name from ABR	2	Email Address	s47 F
	ABN	s47E	Provider Address	s47E	Other Applications	
	Legal Entity	Matched	Provider Status	Activo	Another Application Exists in this Funding Round	i N
	Matching Result Legal Entity Blocked		Provider	Matthe	Another Application Exists in Different Funding Round	Y
	For New Agreements	2	Matching Result Provider Blocked	Matched		
	Current Agreement Exists		For New Agreements	-		
	Compliance Criteria Eligibilit	ty Criteria Appraisals	ant Agreement Informatio	n Agreement Informati	on Application Financials Application Items	4
		4				
			The second			
	E	Eligibility Criteria	Appraisals Grant Ag	reement Informat		
	A					
	Appraisais					
	~	*	\odot			
	se as Final Appraisal Ty	ype Appraiser Last Na	me Appraiser First Name	Status		
	Assessment	t s47E		Completed		

Steps	Actions
10	Highlight the record ticked Use as Final. Confirm the Status is Completed and a Score has populated.
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreem
	Appraisals
	✓
	Use as Final Appraisal Typ Appraiser Last Na Appraiser First Nam Status Score Banding
	Assessment Administrator Baseline
	Assessment S47E Completed 6 1
11	Scroll down to the Selection Criteria List
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreem
	Appraisals
	Use as Final Appraisal Typ Appraiser Last Na Appraiser First Nam Status Score Banding \$47E
	Assessment Completed 5 1
	Assessment Administrator Baseline
	Assessment Completed 0 1
	Selection Criteria List
	Selection Criteria List V
	# Criteria Guidelines Assessment Justification
	1 Criterion 1 - Selection Criteria2 Satisfactory Response appears to be incomplete a
	2 Criterion 2 - How Selection Criteria 2 Satisfactory The response demonstrates how the i
	3 Criterion 3 - Selection Criteria2 Satisfactory The applicant stated that no existing

Steps	Actions	Actions					
12	For each	For each of the Selection Criteria:					
	Confir	 Confirm the score in the Assessment column matches the score in the Assessment Tool 					
	0	• 1 = Poor or Limited					
	• 2 = Satisfactory						
	0	3 = Good					
	0	4 = Very Goo	d				
	0	5 = Excellent					
	Confir Select	m the text in th tion Criteria	ne Assessmen List	nt Tool matc	hes the text in the Justification column.		
		~		•	Selection Criteria List V		
	#▲▼	Criteria	Guidelines	Assessment	Justification		
	1	Criterion 1 -	Selection Criteria	2 Satisfactory	Response appears to be incomplete		
	2	Criterion 2 - Hov	w Selection Criteria	2 Satisfactory	The response demonstrates how the		
	3	Criterion 3 -	Selection Criteria	2 Satisfactory	The applicant stated that no existing		

Steps	Actions
13	Confirm the total score in the Assessment Tool is the sum of the selection criterion scores.
	Confirm the total score matches the score in FOFMS.
	Home Programs Organisations Funding Rounds Funding Agreements Milestones Payments Reviews Summaries Geo Spatial Actions Literature Con Applications All Funding Rounds My Managed Funding Rounds Registrations DOI Funding Rounds Administration
	s47E + Q &
	Application Details Appraisal Details
	id + s47E Primary Contact s47E Evaluation Team Assessment Team
	Program Name + S47E Compliant Ves
	Funding Round Name * \$47E 3 Recommended Funding \$47E Eligible Yes 🗸
	Registration Id: S47E C Places/Services Applied For: Score: 6
	Financial Year. 2016-2017 V Recommended Banding. 1 Planes/Services
	Number Application State NSW V Ranking 0
	Submission Date 24/01/2017 01:21:31 PM Late Application On Time 💙 QA Review Funding
	Received Date * 24/01/2017 🔯 Submission Type * Online - External HTML 💙
	Funding Round Type V Number of Attachments 3
	Application Submission Reference S47E
	Appraisal Details
	Evaluation Team: Assessment Team
	Compliant: Yes
	Eligible: Yes
	Score: 6
	Banding: 1
	Ranking: QP
	QA Review: 🗆 Funding
14	Select the Application Description tab
	Note: If you cannot view the Application Description, select Application Description from the drop
	For New Agreements Matching freat Matching Freat SacS Override Reason
	Carrent Agreement Exols of For New Agreements
	Compliance Criteria Eligibility Criteria Appraisals Grant Agreement Information Agreement Information Application Financials Application Items Application Description
	 1a14
	Application Financials Application Items Application Description
	0

Steps	Actions	
15	Confirm the Assessor has Confirm that the Summar Assessment Tool. <i>Note: Each field has a 20</i>	s populated the Application Description view tab. y of Application and Summary of Assessment fields in FOFMS match the 000 character limit including spaces.
	Summary of Application:	
	Summary of Assessment:	test

Steps	Actions				
16	If there are no QA issues in FOFMS or	the Assessment Tool:			
	 Tick the QA review box 				
	(This will notify the Moderators th	at the application is rea	ady for mod	eration).	
	If there are QA issues in FOFMS or in the	ne Assessment Tool:			
	• Do not tick the QA review box.				
	Home Programs Organisations Funding Rounds Funding Agreements Milestones P	ayments Reviews Summanes Geo-Spatial Acti	ions Literature Contact	ts Child Care User Preferences	-
	Applications All Funding Hounds My Menaged Funding Hounds Hegistrations UV Funding \$47E	Hounds Administration		+ 9 8 4 1011-	\$ X
	Application Details	Appraisal Details		Status Details	
	Id. S47E Primary Corract S47E	Evaluation Tea	m. Assessment Team	Funding Round Phase Open/Appraise	
	Program Name * S47E T Funding Applied For S47E	Complia	nt Yes 🗸 🗸	Status • Under Assessment	*
	Funding Round Name + S47E Recommended Funding S47E	Eligib	No Yes	Sub Status • Complete	*
	Financial Year 2016-2017 Recommended	Bandin	ne o	Shortlisted	(B)
	Number Application State	Bankin	ng OP	Check Application 🕑	
	Submission Date 24/01/2017 01:21:31 PM Late Application On Time	CA Revie	w 🗹 🛛 Fundi	ng Round Defaults Checked 🗔	
	Received Date + 24/01/2017 III Submission Type + Online - External	HTML 🛩		Minute Generated: \Box	
	Funding Round Type Number of Attachments: 3			Minute/Ref Number	
	Application Submission Reference: S47E	/			
	Appraisal Details				
	Evaluation Team:	Assessment Term	٩		
	Compliant	Yes	~		
	Eligible	Yes	~		
	Score:	6			
	Banding	1			
	Ranking	<u>¥</u>			
	QA Review:	Fi Fi	unding		

Update Workbook/Notify Assessor

Steps	Actions
17	 If there are no QA issues: Go to step 21 If there are QA issues: The application will require a partial re-assessment by the original Assessor. Go to Step 18
18	From the Sub Status drop down menu re-set from Completed to Appraisal.
	Status Details
	Funding Round Phase: Open/Appraise
	Status: VInder Assessment
	Sub Status: * Appraisal 🗸
19	Save the record using Ctrl+S or click the work building Rounds Funding Rounds Funding Rounds Funding Rounds Funding Rounds Milletaries Rounds Administrate Rounds Administry Rounds Administrate Rounds Administrate Rounds Admi

Steps	Actions
20	Open and complete the QA – Partial Re-Assessment email template to notify the Assessor of the QA issues.
	Provide a detailed and clear description of the issues so that the Assessor understands what corrections are required. Discuss with the Assessor if necessary.
	ARC Document – D16/7538081 – Template #7
21	Update the QA Workbook Note: If the Moderator is also undertaking the QA Review, update the Moderator Workbook.
	ARC Folder – EF <mark>XX/XXXXXX</mark>
22	Save and Close the Assessment Tool and the QA Workbook. Log out of FOFMS

Logging Out of FOFMS

eps	Actions												
	To log out of FOFMS select File then Log Out or use shortcut Ctrl+Shift+X.												
	ORACLE	File	Edit	View	Navigate	Query	Tools	Help	Search				
	R R & .	Creat	e Bookn Out (Ctrl-	nark Shift+X1									

Need Help?

For further assistance please contact your Team Leader.







Assessment Matrix

Program Name Selection ID: XXXX-XXX Funding Round Name Restricted/Open Selection Process

Assessors must use this Assessment Matrix to rate each application against the nominated selection criteria, noting the following:

- The Assessment Matrix is a six-point (0-5) rating scale, with each score corresponding to a quality rating and rating description.
- The rating description reflects the level of information provided by an applicant against a selection criterion, which determines the score and quality rating for that criterion.
- · Assessors determine an application's overall score by combining the scores for all criteria.

Applications must be completed in accordance with the Program Opportunity Guidelines and other documents in the application pack.

Selection Criterion 1 – Insert Selection Criterion 1 as described in Funding Round Summary (Bold).

The response **must** demonstrate:

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. OR Response does not address the criterion.	Provides limited information.	Provides a basic description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a relevant and convincing description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a comprehensive description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Significantly exceeds the expected response for a score of 4.

Selection Criterion 2 – Insert Selection Criterion 2 as described in Funding Round Summary (Bold).

The response **must** demonstrate:

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. OR Response does not address the criterion.	Provides limited information.	Provides a basic description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a relevant and convincing description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a comprehensive description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Significantly exceeds the expected response for a score of 4.

Selection Criterion 3 – Insert Selection Criterion 3 as described in Funding Round Summary (Bold).

The response **must** demonstrate:

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. OR Response does not address the criterion.	Provides limited information.	Provides a basic description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a relevant and convincing description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a comprehensive description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Significantly exceeds the expected response for a score of 4.

Selection Criterion 4 – Insert Selection Criterion 4 as described in Funding Round Summary (Bold).

The response **must** demonstrate:

Score	0	1	2	3	4	5
Quality rating	Does not meet criterion	Poor response	Satisfactory response	Good response	Very good response	Excellent response
Rating description	Applicant has not provided a response. OR Response does not address the criterion.	Provides limited information.	Provides a basic description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a relevant and convincing description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Provides a comprehensive description of: insert dot points listing attributes of selection criterion, noting that you may need to replace terms such as "your organisation" with "the organisation" to make the statement generic.	Significantly exceeds the expected response for a score of 4.

For Official Use Only

FOI 18/19-056 Item 4 Document 9



Australian Government





Applicant Legal Name		
FOFMS Application ID	Total Score	
Assessor	Assessment Date	XX/XX/XXXX
Moderator	Moderation Date	XX/XX/XXXX
	Summary of Application (2000 character limit including spaces)	
 The Summary of Application is a This should be pre-filled in FOF Description). 	rt summary of the activity proposal. with words provided by the applicant in their form (under the heading Activity
	Summary of Assessment	
	(2000 character limit including spaces)	
Not Applicable		
Criterion 1		

Describe how the implementation of your proposal will achieve the Activity objectives for all stakeholders, including value for money within the Grant funding.	Score	
Write a sentence or two that summarises the applicant's response to the criterion, including number of requirements that have been met and the evidence provided.	g the quality,	the
Write the requirements of the criterion as either strengths or weaknesses. There may be on only weaknesses.	ly strengths	or
• Strengths		
Weaknesses		

FOI 18/19-056 Item 4 Document 10



Community Grants Hub



Fit

Community Grants Hub Assessment Centre Tracker ID - Round Name

Tracker ID - Round Name Moderator Workbook - Mode ato Name

				Moderator a	Evaluation	1	10	0	Assessor	Original S	lcove	12		Re-Assessment	5	6	Rey sed Sc	ane	1	-		i.	Completio	ń	Re-Moderation	if applicable)			
No.	Application 10	Appl cant Name	Assesso	Mode at on sta t data	Mode ato act e C te a L	Mode sto a sco e C te 2	Mode ato sco e C te a a	Total	C to a 1	C 1# #2	C 50 x3	Total	Mode ato a Comments on Assessment - p o to d scuss on with Assesso	Re-Assesso 1 satisfied type 76.47 and pills Competing	Date Rate ed to Re- Assesso	Type of Re- Assessment eg altre bj	C 1# #1	C te s2	C 18 A3	Total	Mode ato Comments on Re- Assessment (s is he Assessment has been only conf)	Mode at on Completion Date	Construents E approximit	F nai Total Score (complete for <u>all</u> applications)	Re-Mode st on equested (YES/NO)	Re-Mode at on equert date	Discussion had with Assesso egs ding changes (YES/NO)	Re-Mode st on complete (YES/NO)	QA Office notified Re-Mode at on a complete (rES/NO)
			0	Q	10 I.	1	-0 · · ·	2	5 12	St - 6		1. S	0		12	S/	1 2		2 12			8 3		3	· · · · · · · · · · · · · · · · · · ·			St - 9	
	0			10		X	1			10 O		00 0);				2 2		1 11		2	1 () 1		(1			11. 04	
			6	0	S	16	- C	2	1. 1.	84 - B		SA - S	0		5	24	14 S.		S - 31			6 3		S				2. 3	





Community Grants Hub Assessment Centre

Tracker ID - Round Name

QA Review Workbook - QA Officer Name

				(QA Review Details	Completion			
No.	Application ID	Applicant Name	Moderator	loderator QA Review start date QA/ Formatting Sues / Comments Date Moderator notified Yes/No		Date Moderator notified of issues	Date Actioned by Moderator	Date QA complete	Comments	
								().		
							0			
	24 - K							0).		
							1			
	1									
	14 id							d2.		
							1			
							0			