Government Finance Officers Association (GFOA)

Certificate of Achievement for Excellence in Financial Reporting (COA) Process

Laserfiche Forms Implementation

End User Documentation:

Volunteer Review

December 2020

Laserfiche

Contents

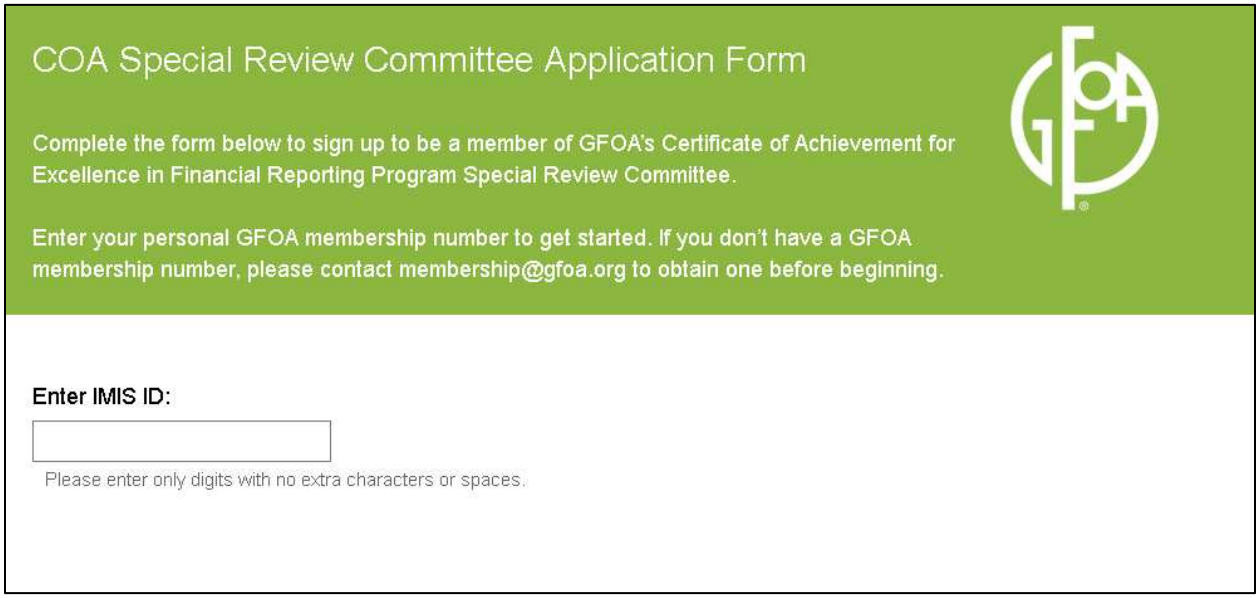
Intended Use and Users

This Document is intended to assist interested individuals apply to join the Special Review Committee (SRC) and help current SRC members complete reviews in GFOA's Awards Management System (AMS).

SRC Application

Application Form

Interested candidates must complete the SRC application form. A link to the application form can be found on the Volunteer page on the GFOA website. This link will take them to the form below which requires entry of their unique GFOA member ID (IMIS ID) into the IMIS ID field on the form.

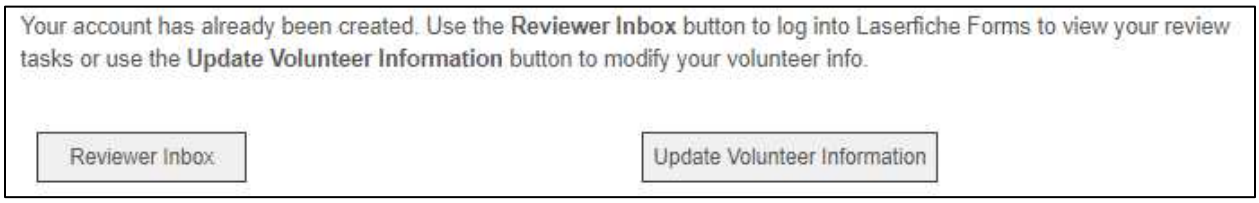


The form will confirm that the individual does not already have a volunteer reviewer account in the AMS.

Important: In order for the form to confirm the IMIS ID, the user must click somewhere on the form outside of the "Enter IMIS ID" field after typing in the value. Simply typing a value into the field and not clicking outside of the field will not register the field change and no further action will take place on the form.

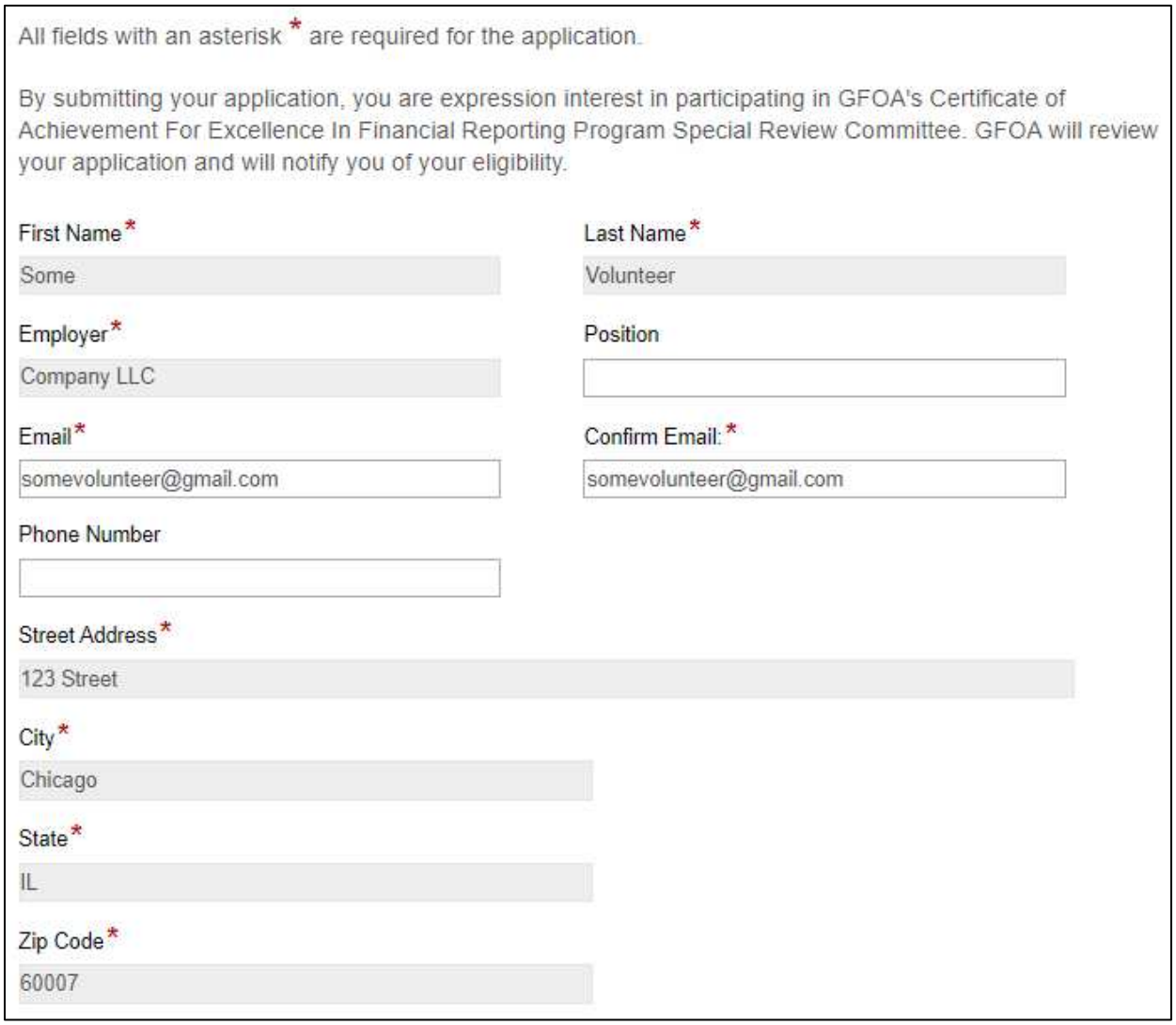
If the iMIS ID cannot be retrieved or if the value entered is a company iMIS ID, the following message will be displayed. Contact membership@gfoa.org to obtain your iMIS ID.

If an AMS account already exists for the iMIS ID that was entered, the following buttons will be displayed.



The user will now have the option to click one of the two buttons to redirect them to their Laserfiche Forms inbox where they can find any volunteer review tasks that have been assigned to them. Alternatively, they can click the Update Volunteer Information button where they will be redirected to the Volunteer Reviewer Update form. Both buttons will require the user to log in with their iMIS ID and password before proceeding to either location.

If the iMIS ID entered by the user is not for a company and an AMS account does not already exist for the iMIS ID, the SRC application fields will be shown (as below).



The following fields will be pre-populated with the volunteer's information that was retrieved from iMIS based on the value entered in the iMIS ID field.

- First Name
- Last Name
- Employer
- Email
- Street Address
- City
- State
- Zip Code

All fields (with the exception of email address, phone and position) will not be editable. If any information in the non-editable fields is incorrect, the volunteer should contact membership@gfoa.org to update it before continuing. The user will need to confirm their email address by entering a value into the Confirm Email field. If the two email fields are different, the following message will be displayed and the user will not be able to submit the application form.

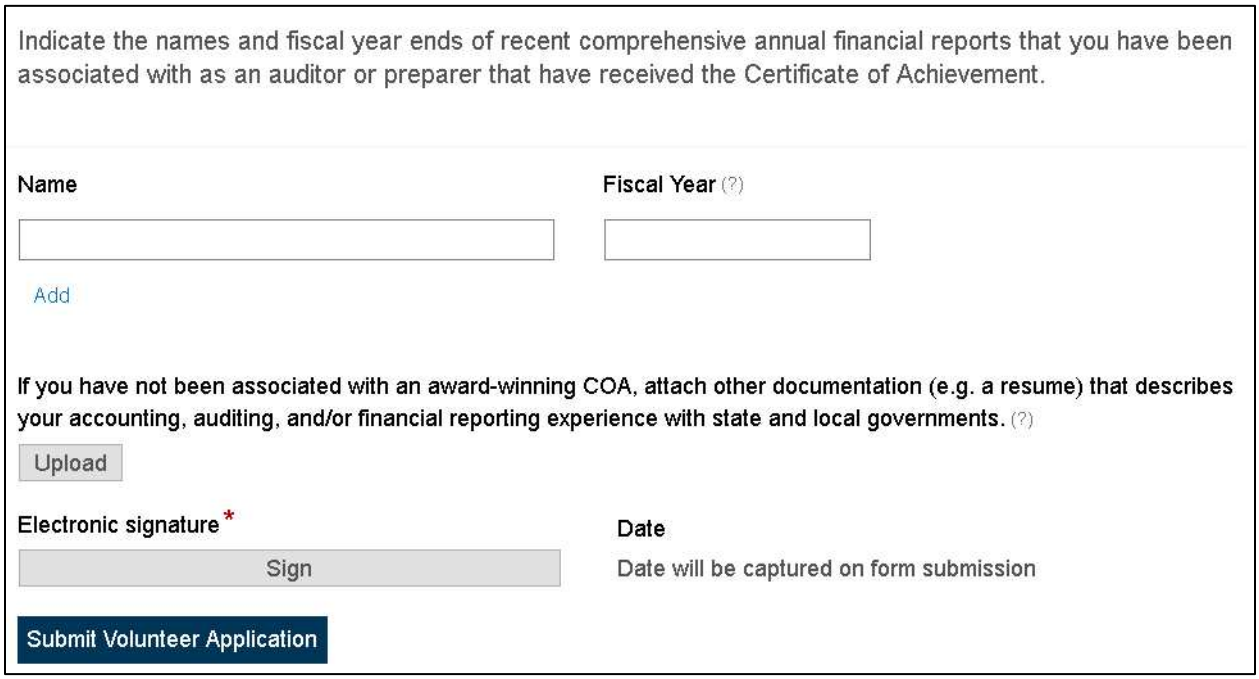
Next, the applicant will need to specify which types of governments they are willing to review.

The applicant may make one or more selections using the checkboxes next to each government type. This will determine the type of COA Applications the volunteer will be assigned to review. If the applicant does not check a box for a certain government type, they will never receive a report to review for this government type.

After choosing one or more government types to review, the applicant must specify which months they are available to review COA applications. If they select 'All Months', they are presented with the following message:

By selecting 'All Months' the applicant is indicating that they are willing to accept reports to review every month of the year. Alternatively, if the applicant selects 'Specific Months' they will need to select one or more months that they will be available to reviews.

Finally, the applicant will need to complete the remaining fields on the form if applicable. After the user has applied their electronic signature they can Submit the SRC Application to be reviewed by the COA Support team.



COA Support Approval

After an SRC application has been submitted, a COA Support team member needs to approve the application before the volunteer can start receiving reports to review.

If the application is not approved by COA support, the applicant will receive an email stating that their SRC Application has not been approved along with the reason it wasn't approved. If the application is approved by COA Support, the user will receive an email that their SRC Application was approved. Additionally, the email will contain their username (iMIS ID) and temporary password that they can use to log into the AMS. The new volunteer reviewer will need to use the link in the email to log into the AMS with their temporary password. Upon logging in, they will be required to change their password to something that they create. Finally, after successfully changing their password they will receive an email that a report has been assigned to them for review.

Volunteer Reviewer Update

If a Volunteer Reviewer would like to change any of their personal information or the government types/months that they are willing to perform reviews, they can use the Volunteer Reviewer Update form using the following link.

https://lf.gfoa.org/Forms/VolunteerReviewerUpdate

Alternatively, the volunteer reviewer can log into Laserfiche Forms, go to the Start Process tab, and launch the Volunteer Reviewer Update form from there.

When the user launches the form they will notice that their existing information populates automatically into the form fields. After the values have automatically populated, the volunteer will be free to make any changes that they wish. After making the necessary changes they can submit the form. After form submission their information, government types, and availability will be updated in the internal database tables. The volunteer will also receive an email confirming that the changes were made successfully. Finally, if the volunteer has an outstanding Volunteer Review task, the task may be reassigned if the volunteer reviewer updates conflict with the currently assigned task (e.g. the currently assigned report is for a government type that the volunteer no longer wishes to review).

Volunteer Review

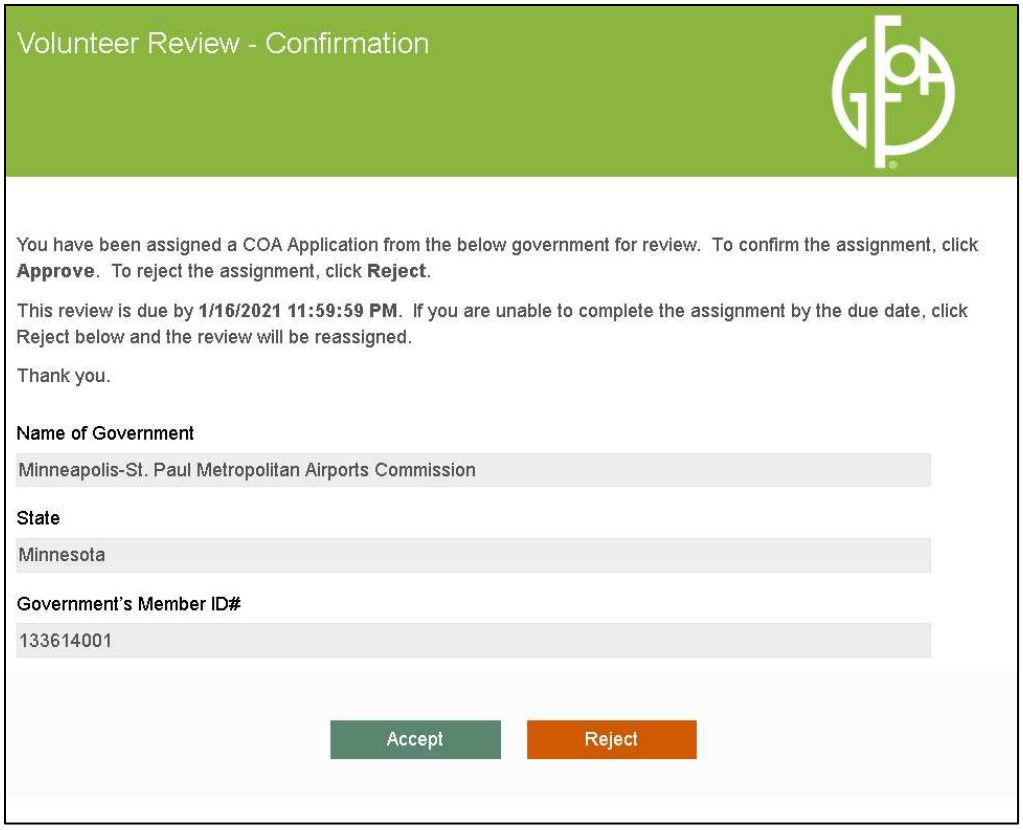
Volunteer Review Confirmation

When a volunteer reviewer is assigned a report for review, they will receive an email similar to the one below.

> Hello,
>
> You have been assigned a COA Application to review. Please use the link below to accept or reject the application assignment. If you have not accepted the assignment within 7 days, the COA Application will be reassigned to another volunteer reviewer.
>
> **Name of Government**: County of Ada
>
> Thank you.
>
> **Click here to open this task in Forms**

The volunteer reviewer must use the link in the email to open the 'Volunteer Review – Confirmation' task. The form below will open. This task requires the volunteer to either accept or reject the assignment.

If this Volunteer Review Confirmation task is not submitted within 7 days, the report will be reassigned to another volunteer reviewer.



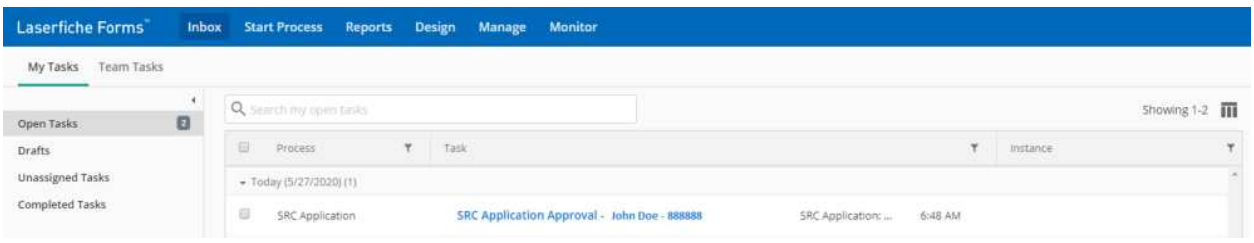
Volunteer Review Task

If the volunteer accepts a review by clicking the Accept button in the Volunteer Review Confirmation task, they will be immediately redirected to the Volunteer Review Task.

Alternatively, volunteer reviewers can check to see if they have any open review tasks by using the following link for Laserfiche Forms.

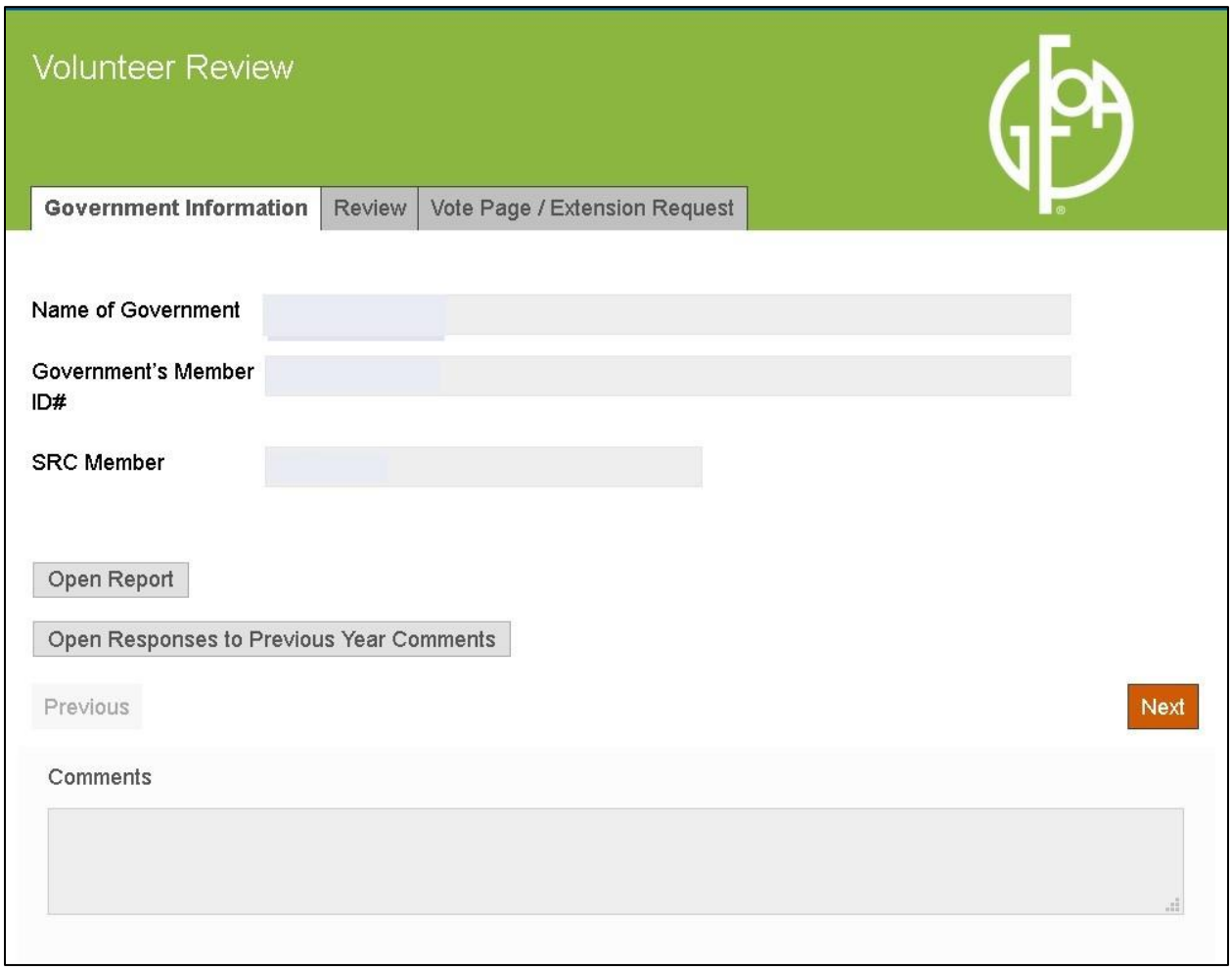
https://lf.gfoa.org/Forms

Once the volunteer has logged into Laserfiche Forms they can view their open task in the My Tasks tab of their Laserfiche Forms inbox (as below).

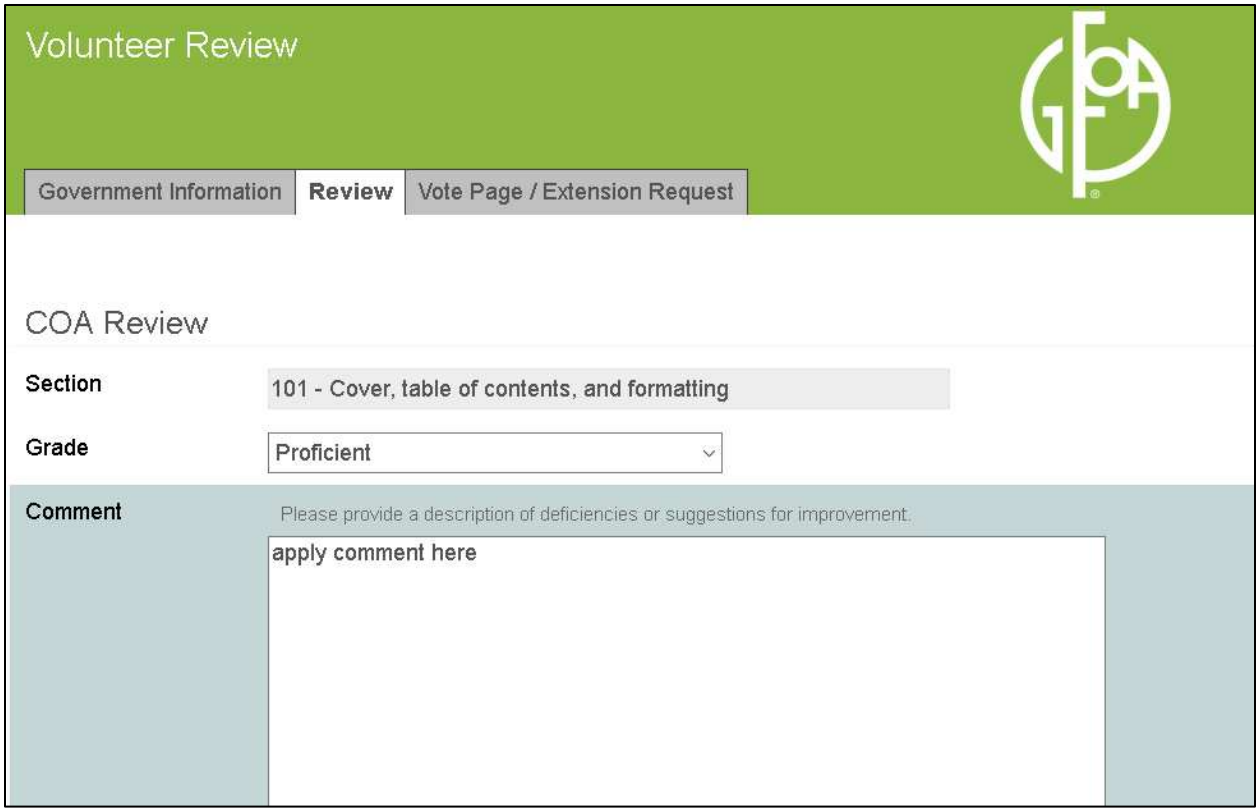


If they have been assigned reports for review, they will see the pending volunteer review tasks in the Open Tasks section of the My Tasks tab. If they have saved any of their volunteer review tasks as a draft, those will appear in the Drafts section. To open the task, click on the task name.

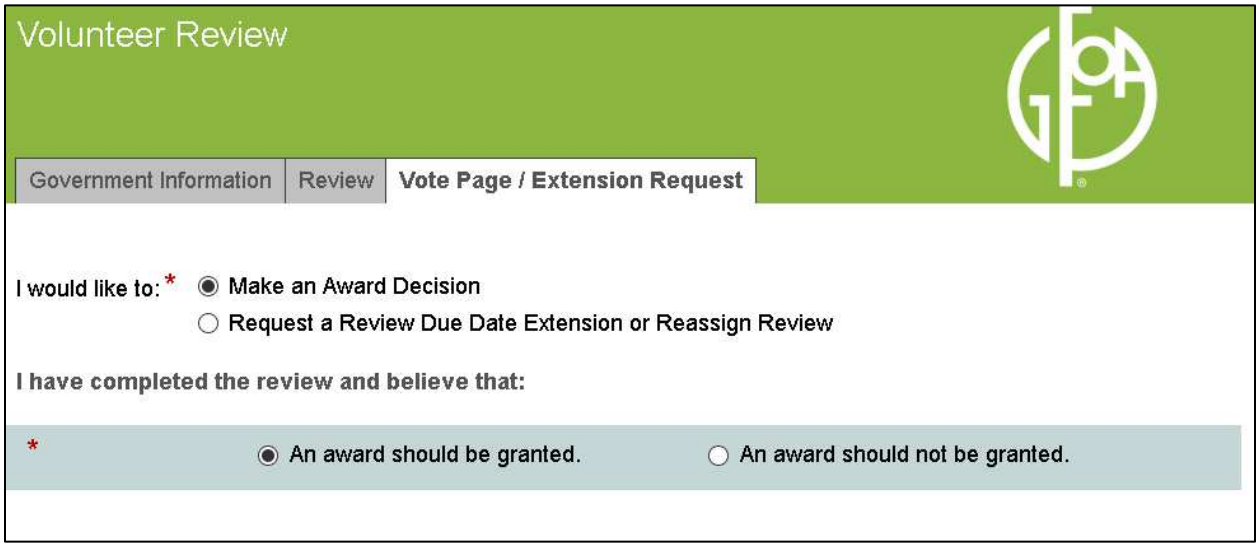
The Volunteer Review task form will have three tabs (as shown below). The Government Information tab will show the name of government and Member ID of the applicant. It will also provide buttons for any of the required documents that were uploaded by the applicant (e.g. 'Open Report'). If the volunteer clicks one of these buttons it will open the document in another tab.



The Review tab is where the volunteer can provide their grades and comments for each section number. These grades and comments that are applied by the volunteer will show up in the 'Volunteer Review' tabs of any subsequent Initial Review or Final Review tasks. To apply a grade for a particular section, find the section number in the Review tab and select a grade from the Grade dropdown field. Then, if you wish to provide a comment for the grade that was provided for that section number, you may do so using the Comment text field below the section grade dropdown (example shown below).



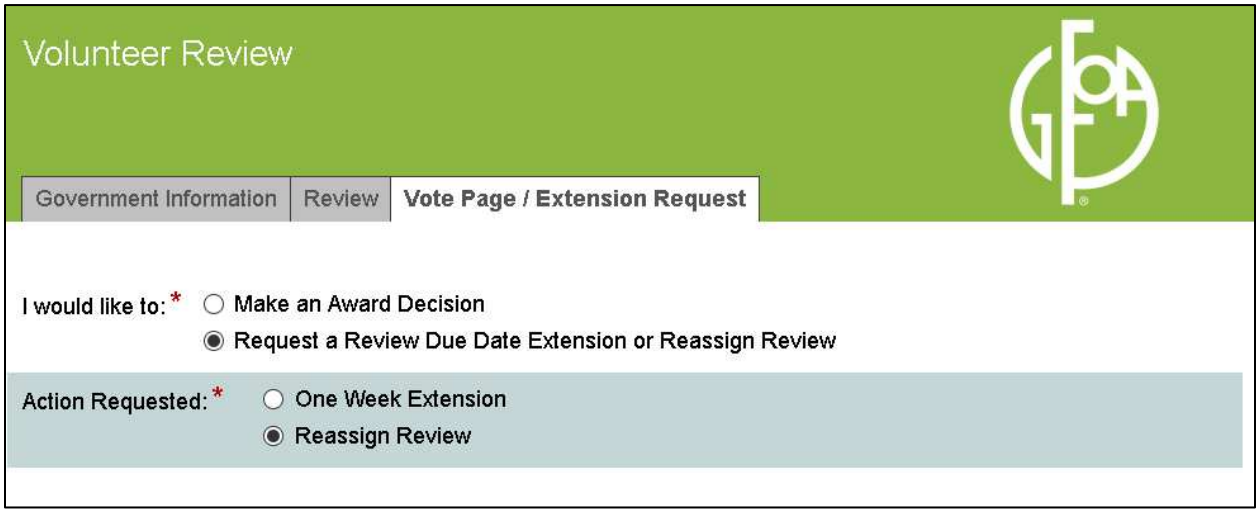
Finally, the Vote Page/Extension request tab is where the reviewer can provide their award decision. They will be able to simply state whether they believe an award should be granted or not using the fields depicted below.



After making an award decision, the volunteer will need to apply an electronic signature and Submit the form.

Extension Request/Reassign Review

To request a one week extension to the volunteer review due date or reassign the review to another volunteer review, the volunteer reviewer should navigate to the 'Vote Page/Extension Request' tab of the Volunteer Review task. To reassign the review, the user should select the following options and submit the task.



Alternatively, if the volunteer would like to request a 7 day extension, they should select the 'One Week Extension' option in the Action Requested field and submit the form. After requesting an extension, a Volunteer Due Date Extension Request task will be sent to the COA Support team inbox.

A COA Support team member will need to approve the extension. If the extension is rejected, an email will be sent to the volunteer to notify them that their extension request was denied. The volunteer review task will then be redistributed to another volunteer reviewer. If the COA support member approves the extension, the volunteer reviewer will receive an email to notify them that their extension request was granted. The email will contain a link to the new Volunteer Review task as well as the new task due date.

Only one 7 day extension is permitted. After receiving an extension of their volunteer review task, the volunteer reviewer will not have the option to apply for further extensions.

Repository Access

The Laserfiche Repository contains the documents needed to complete the review. To access the Laserfiche repository, use the following link:

https://lf.gfoa.org/laserfiche

Each volunteer reviewer will have their own subfolder in the Laserfiche repository that will only be visible to them. For any review that is assigned to them for review, shortcuts to the documents associated with that COA application will be placed in the associated <Entity Name> folder within the volunteer reviewer's folder based on the following folder structure.

- Volunteer Reviewers
    - <First Letter of Last Name of Reviewer>
        - <Last Name>, <First Name> <Middle Initial (if needed)>
            - <Fiscal Year> – *or* – <Fiscal Year – Stub>
                - Program
                    - <State>
                        - <Entity Name>

The volunteer will have read-only rights to these documents.