F-200 Training Manual

Last Updated
February 2021

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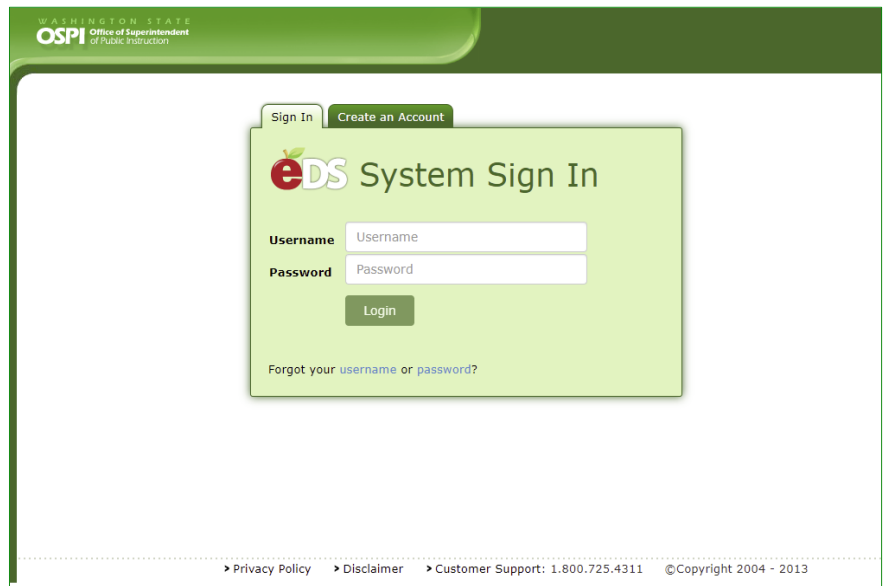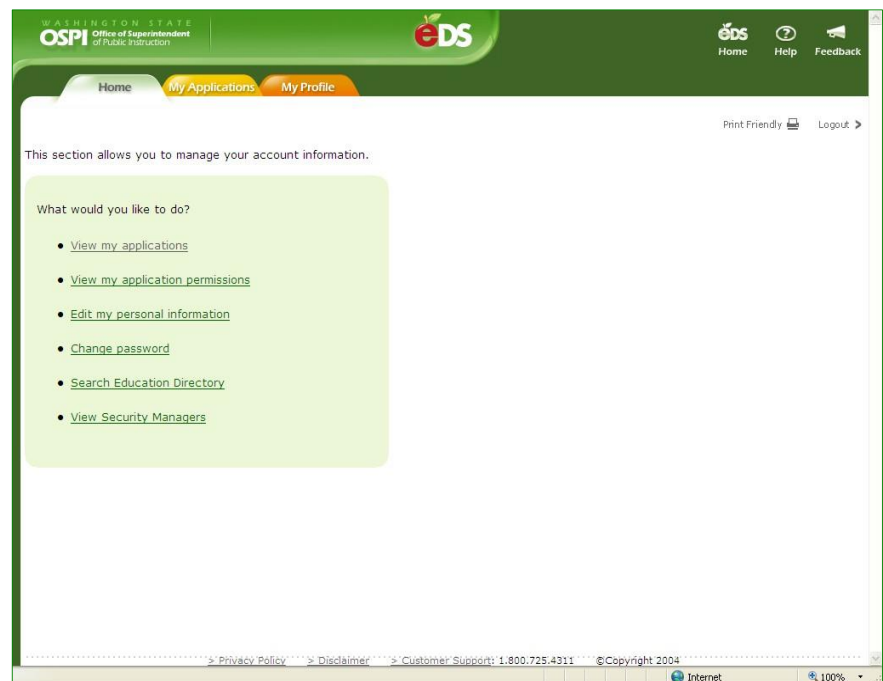
Log Into SAFS (All Users)

1. Go to the **EDS Login** screen and type in your username and password then click Login.

   Note: The URL to use is: https://eds.ospi.k12.wa.us/Login.aspx

2. From the EDS Home page click on the **My Applications** tab or the *View my applications* hyperlink.

3. From the My Applications screen, click on **SAFS** in the Application list table.
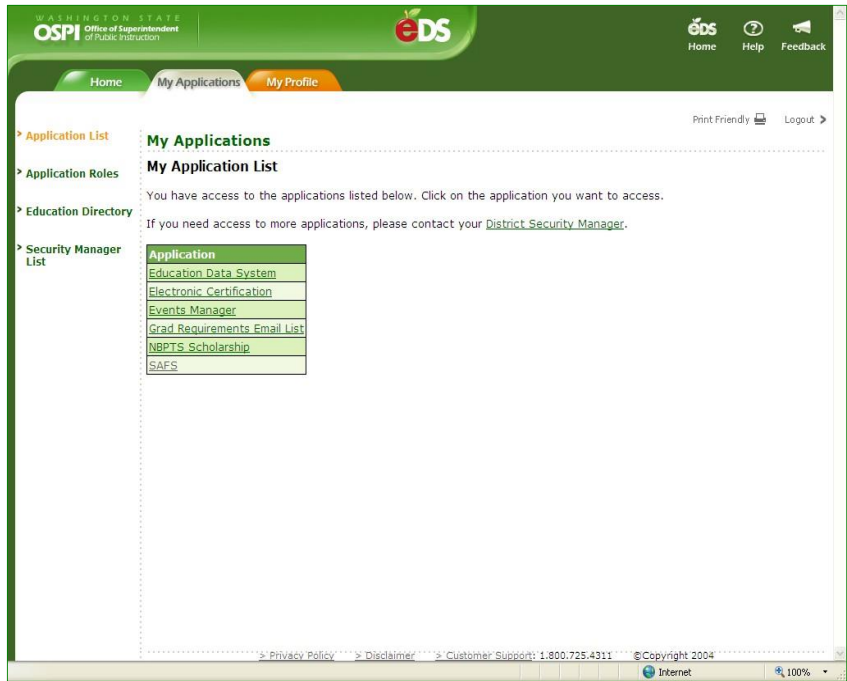
4. From the Info Center page, you can click on the tabs in the top navigation bar to access the EDS applications. Click on the **F-200** tab to go into the F-200 application.

   Note: The EDS application is designed to be used with Internet Explorer or Edge as the Web browser. It is best not to use other browsers.
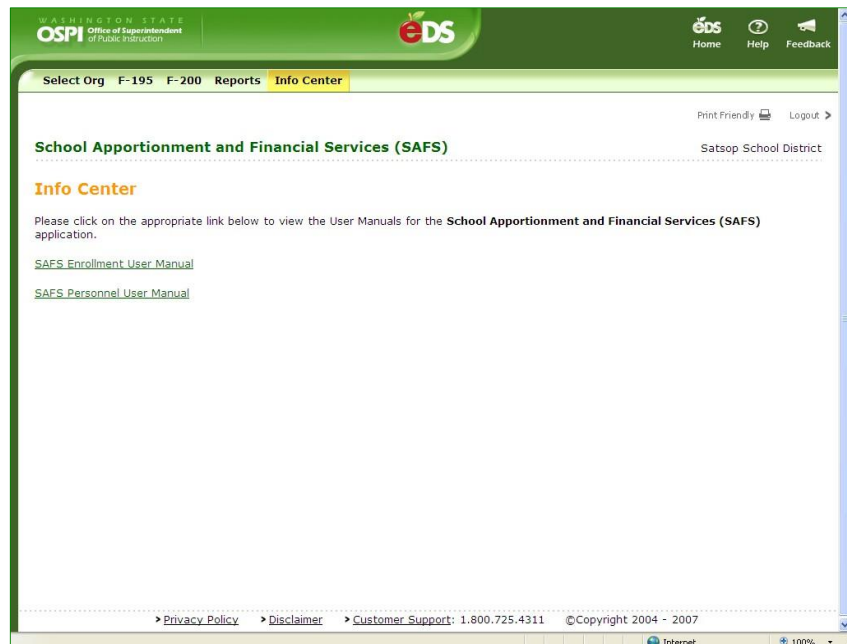
Create a Budget Extension (SD Users)

1. The first screen you will see in the F-200 application is the **List Budget Extensions** screen. To create a budget extension for the current fiscal year, click the *Create* button next to the fund for which you will be creating an extension.

2. You will go to the **Input Data** screen. The data from your approved budget for this fund (or from your last approved extension) will pre-populate the input screens.

   Note: The status of the extension will automatically change from 'Not Started' to 'In Process at District'.

Delete an Extension (SD Users)

1. To delete an in-process extension document, click the **Delete** button for the desired budget in the List Budget Extensions screen. In the Delete Budget pop-up window that appears, click the check box saying, '*I acknowledge that the budget and all its contents will be permanently deleted.*' If this box is not checked, you will not be able to delete the budget. To not delete the budget and close the pop-up window, click the Cancel button.
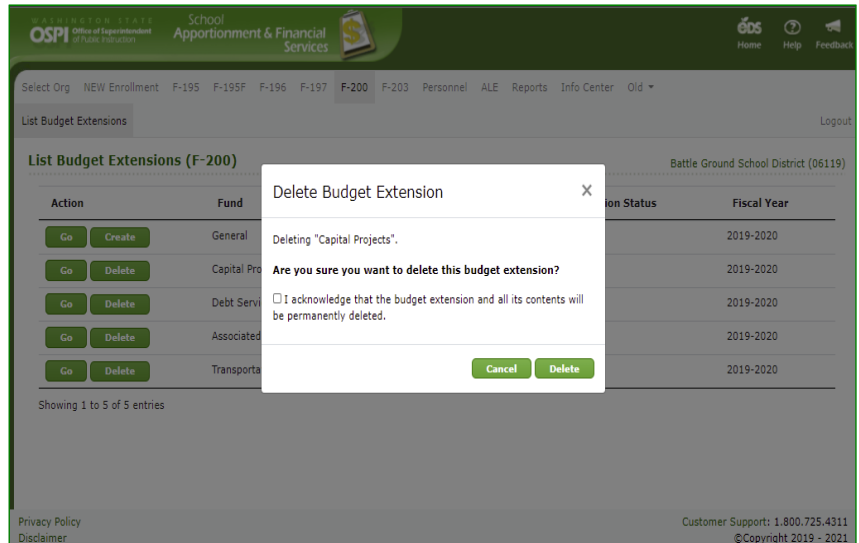
   Note: A budget can only be changed by SD users and when the budget document has a Budget Status of 'In Process at District'.

2. Once the extension has been deleted, it displays a Create button again. The extension when created will display the approved F-195 data, or the previously approved F-200 data for that fund.

   Note: See Delete Subsequent Extension section for details on deleting a 'Filed/Approved' extension.
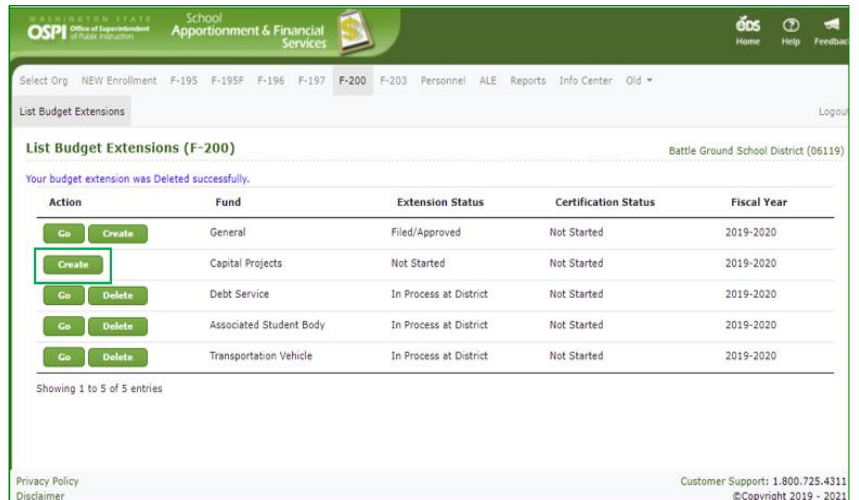
Import Data (SD Users)

Upload New Data File

1. When you click Go from the List Budget screen, you are taken to the **Input Data** screen. To import data into the F-200, click on the **Import Data** tab in the secondary navigation bar. For required file format instructions, click on the <u>click here</u> hyperlink.

   Note: If you are a district that uses WSIPC and have not extracted a data file, you need to do this first before you can import. If you are a district not using WSIPC, you will not have files to import. The F-200 can import any data files that meet specifications. Your service provider can contact us for assistance in setting up files that can be imported.

2. Click the **Choose File** button and select the F-200 data file to import. The file name will display next to the Choose File button, then click the **Upload** button. The upload may take a few seconds. After it is done, you will see a message saying, 'Your file was uploaded successfully.'

   Note: You may need to navigate to another screen to see your uploaded file in the View/Import Uploaded File(s) table.

Import Data

1. Once the uploaded files are displayed in the View/Import Uploaded File(s) table, you may import the data. Select the fund box and click the **Import Data** button. The import may take a few seconds. After it is done, you will see a message display 'Your import was successful.' Repeat to import the other data type file.

   Note: To view the data in the import file, click on the <u>View File</u> hyperlink in the Download column.

Input Data (SD Users)

1. Click on the **Input Data** tab in the secondary navigation bar to go to the Input Data screen. Select the page you want in the page dropdown and click Go to bring up that page.

   Note: This user manual only describes the input screens that are unique to the F-200. *Please refer to the F-195 training manual for details about the other screens.*
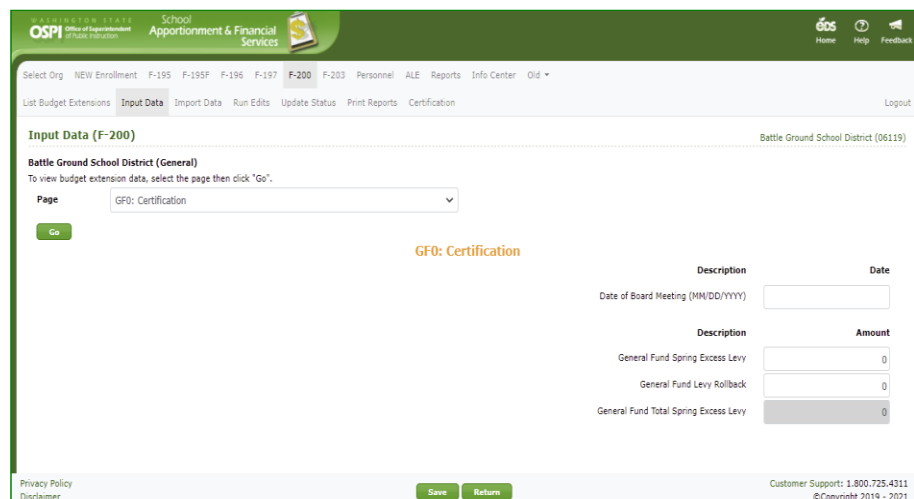
GF0: Certification

2. Each fund has its own certification page. On GF0: Certification, enter the date of the board meeting. The spring levy and rollback amounts will also display and can be updated. Click Save.

   Note: When entering dates, you must include a slash between the numbers (6/11/2009) or a period between the numbers (6.11.2009).

CP0: Certification

3. On CP0: Certification, enter the date of the board meeting. The spring levy amount will also display and can be updated. Click Save.

DS0: Certification

4. On DS0: Certification, enter the date of the board meeting. The spring levy amount will also display and can be updated. Click Save.

ASB0: Certification

5. On ASB0: Certification, enter the date of the board meeting. Click Save.

TVF0: Certification

6. On TVF0: Certification, enter the date of the board meeting. The spring levy amount will also display and can be updated. Click Save.

Run Edits (SD Users)

1. After you have updated data, go to the Run Edits screen by clicking the **Run Edits** tab in the secondary navigation bar.

   Note: You can run edits at any time. This can be done after importing data, or it can be done later.

   Note: Whenever data has been changed in an extension, the Run Edits status will be set back to 'Edits have not been run' for that budget.
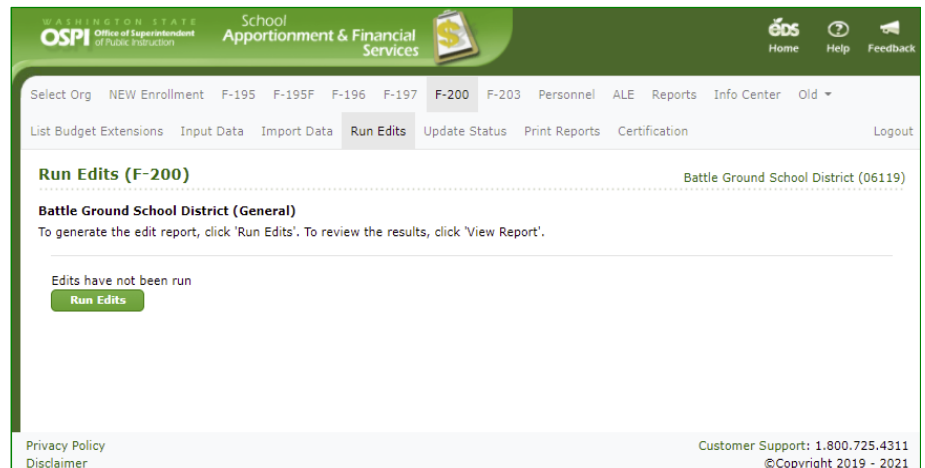
2. To run budget edits, click the **Run Edits** button. It may take a few seconds for edits to run. After they do, the status column will show the number of information and error edits found.

   To see the results, click the <u>View Report</u> hyperlink. It may take another few seconds for the report to display. Click the <u>Open file</u> hyperlink to view.

3. The edit report opens as a PDF. To print the report, click the print icon ⎙ at the top right of the PDF viewer frame. In the pop-up Print screen, you can select the printer, page range, and number of copies. Click **Print**.

You may save the report by clicking the Save icon at the top right of the PDF viewer.

Print Extension Reports (SD Users)

1. To print the extension, click the **Print Reports** tab in the secondary navigation bar. You can print all pages, or you can select one or more individual pages to print. Check the box or boxes as appropriate and click the **View Report** button.

   It may take some time for the report to download. Click Open File hyperlink to view the PDF report.

   Note: The Certification page cannot be printed until the ESD has set the status to 'Ready for OSPI Review'.

2. To print the report, click the print icon ⎙ at the top right of the PDF viewer frame. In the pop-up Print screen, you can select the printer, page range, and number of copies. Click **Print**.

   If multiple reports were selected, all reports will be displayed in one PDF report.

3. To save the report, click the Save icon at the top right of the PDF viewer.

Update the Status (SD Users)

1. When you are ready to have the ESD begin reviewing your extension, click the **Update Status** tab in the secondary navigation bar. The Status History section displays a separate row to show each prior status, the fund(s) changed to this status, the date the status was changed, and the name of the user who made the change.

2. To update the status, select 'Ready for ESD Review' from the status dropdown and click the **Update** button. After the status is updated, a success message appears, and a new row displays in the Status History with the updated information.

Select an Extension (SD Users)

1. After updating the status, you can return to the **List Budget** screen. The current status 'Ready for ESD Review' will display for the fund you just updated.

    Note: You can no longer Delete that extension, because it is not 'In Process at District'. You will need to change the status back to 'Return to School District'.

2. To go view the extension, click the **Go** button. The *View Data* screen will open. You can view the data but cannot make any changes.

    Note: If you need to make a correction before the ESD begins its review, you can use the Update Status screen to change the status back to 'In Process at District'. After the change is made, then change the status back to 'Ready for ESD Review'.

Create Another (Subsequent) Extension (SD Users)

1. You can only have one extension in process for a given fund at a time. Once the status for a fund is 'Filed/Approved', you will see a **Go** button (to review the approved extension) and a **Create** button (to create an updated extension version for that fund).

2. To create another extension (in other words, amend the extension) that has already been approved, click the **Create** button for that fund. You will be taken to the Input Data screen where you can make your updates to the previously approved F-200 data for that fund.

3. Once the subsequent extension is created, the *Extension Status* is set to 'In Process at District', and the *Certification Status* to 'Not Started'. The budget also displays a Go and Delete button.

   Note: See the [Delete a Subsequent Extension](#) section regarding the delete function.

Delete a Subsequent Extension (SD Users)

1. To delete a subsequent in-process extension, click the **Delete** button for the desired fund in the **List Budgets Extensions** screen.
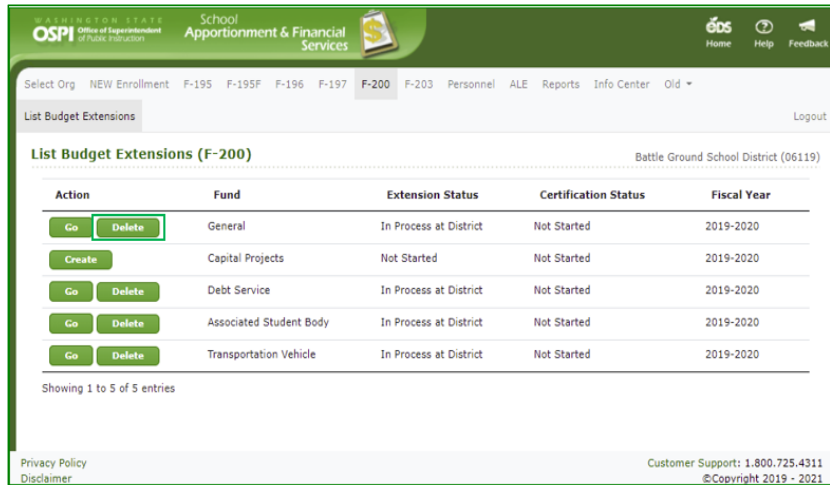
2. In the Delete Budget Extension pop-up window that appears, click the check box saying, '*I acknowledge that the budget and all its contents will be permanently deleted.*' If this box is not checked, you will not be able to delete the extension. Click **Delete** to delete.

   To not delete the extension and close the pop-up window, click the **Cancel** button.

   Note: An extension can only be deleted by SD users and when the extension has a *Budget Extension Status* of 'In Process at District'.
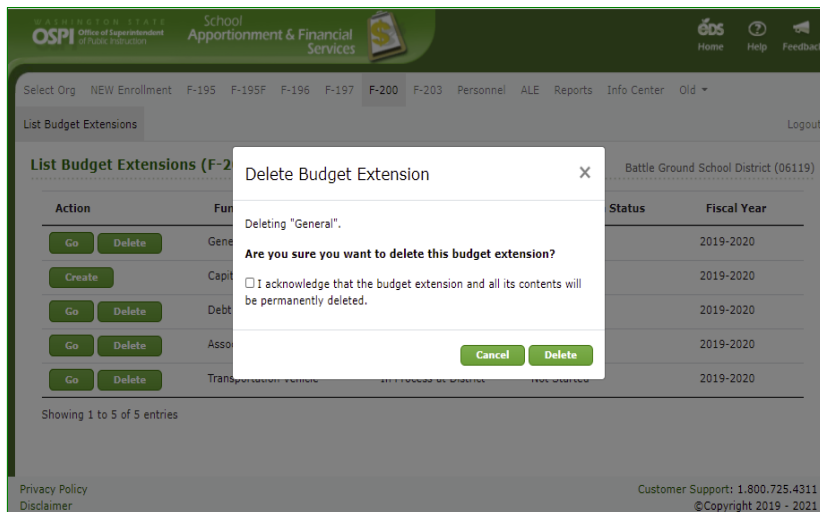
3. Once the fund extension has been deleted, the **Go** and **Create** button will display again. **The extension will revert back with the previously approved F-200 data AND the approved fund certification is retained/ preserved. The extension statuses go back to Filed/Approved and Complete.**

   Note: You can now create another subsequent extension for the fund.
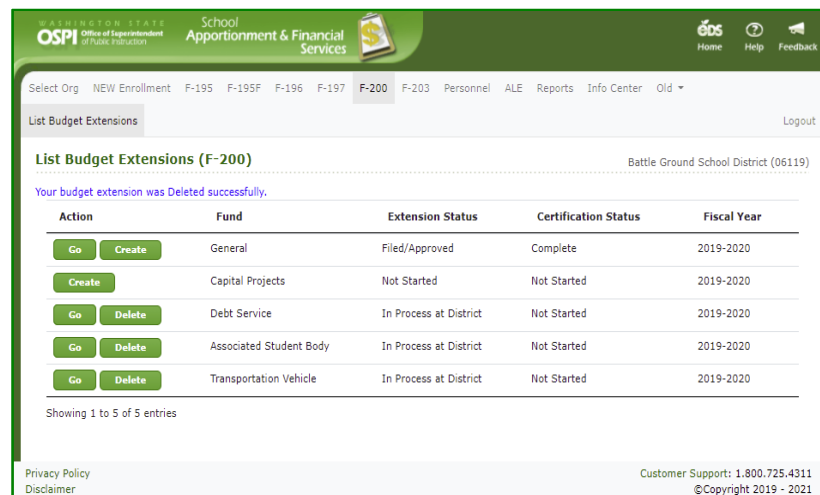
Select an Extension (ESD Users)

1. After a district user has set the status to 'Ready for ESD Review', ESD users can view the extension. After logging in, click the F-200 tab in the top navigation bar. The List Budget Extension screen is displayed.

    To see documents for a specific School District, select it from the dropdown fields, then click List Documents button.

    Note: ESD users can only view extensions for those districts within their ESD.

2. To see all extensions ready for ESD review, select 'All' in the School District dropdown and select 'Ready for ESD Review' in the Budget Status dropdown. Click the **List Documents** button. The districts with budget documents in that status will display.

    Note: The default view is to not include any extensions that have *not* been started. Deselect the check box for **Exclude Not Started** field if wish to see all extensions, including those not started.

3. To see all extensions underway in your ESD, select 'All' in the *School District* dropdown and 'All' in the *Extension Status* dropdown. Click **List Documents** button. To reset the filters for a new search, click the **Reset** button.

   Note: You will see a Go button next to an extension if the status is 'Ready for ESD Review' or higher.

4. To go into a given extension, click the Go button. You will be taken to the **View Data** screen. You can view data, run edits, update the status, and print the extension report.

   Note: When you go into an extension that is 'Ready for ESD Review', the status is changed automatically to 'Under Review by ESD'. In this status, the district user cannot change the status back to 'In Process at District'.

View Data (ESD Users)

1. To view data that has been input by the district, use the page dropdown to select the page, and click Go.

2. You will be taken to the page selected. The screen will look just like the input screen used by the district. However, you cannot make any changes to the data on the screen.

   Note: You can use the page dropdown and Go button to navigate to any other of the View Data screens.

Run Edits (ESD Users)

1. To run edits, click the **Run Edits** tab in the secondary navigation bar. This screen functions just like it does for the district user.

2. To run edits, click the **Run Edits** button. It may take a few seconds for edit to run. After they do, the status column will show the number of information and error edits found.
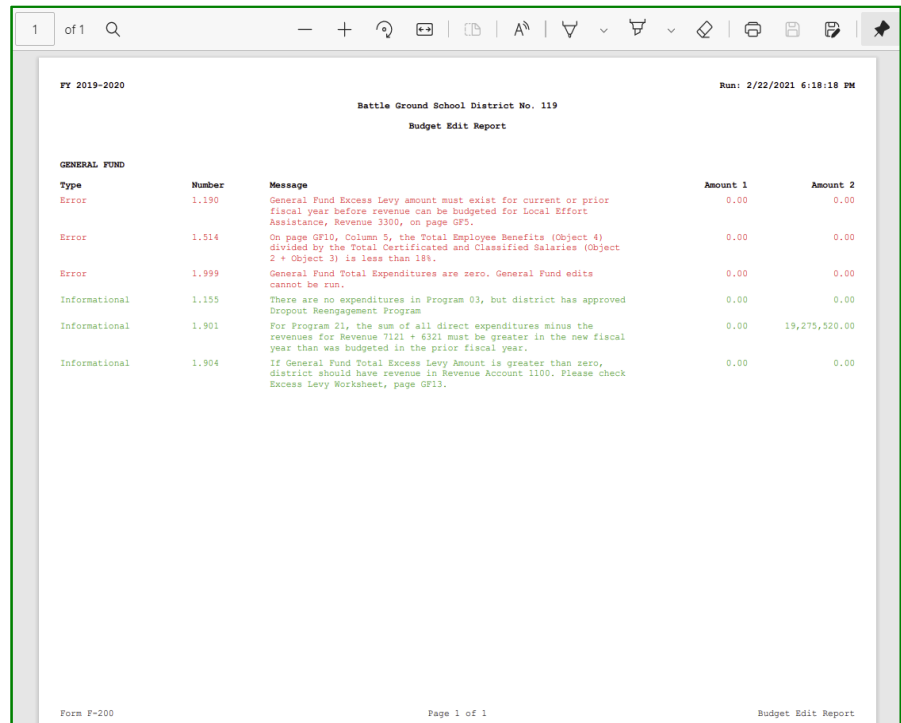
   Note: Whenever data has been changed in an extension, the Run Edits status will be set back to 'Edits have not been run' for that budget.

3. To see the results, click the <u>View Report</u> hyperlink. It may take another few seconds for the report to display. Click the <u>Open File</u> hyperlink to view.

4. The edit report opens as a PDF. To print the report, click the print icon 🖨 at the top right of the PDF viewer frame. In the pop-up Print screen, you can select the printer, page range, and number of copies. Click **Print**.

   You may save the report by clicking the Save icon 🖫 at the top right of the PDF viewer.

FY 2019-2020   Run: 2/22/2021 6:18:18 PM

Battle Ground School District No. 119

Budget Edit Report

GENERAL FUND

Type	Number	Message	Amount 1	Amount 2
Error	1.190	General Fund Excess Levy amount must exist for current or prior fiscal year before revenue can be budgeted for Local Effort Assistance, Revenue 3300, on page GF5.	0.00	0.00
Error	1.514	On page GF10, Column 5, the Total Employee Benefits (Object 4) divided by the Total Certificated and Classified Salaries (Object 2 + Object 3) is less than 18%.	0.00	0.00
Error	1.999	General Fund Total Expenditures are zero. General Fund edits cannot be run.	0.00	0.00
Informational	1.155	There are no expenditures in Program 03, but district has approved Dropout Reengagement Program	0.00	0.00
Informational	1.901	For Program 21, the sum of all direct expenditures minus the revenues for Revenue 7121 + 6321 must be greater in the new fiscal year than was budgeted in the prior fiscal year.	0.00	19,275,520.00
Informational	1.904	If General Fund Total Excess Levy Amount is greater than zero, district should have revenue in Revenue Account 1100. Please check Excess Levy Worksheet, page GF13.	0.00	0.00

Form F-200   Page 1 of 1   Budget Edit Report

Update the Status (ESD Users)

1. After you have reviewed the extension and verified it is accurate, you are ready to update the extension status. Click the **Update Status** tab in the secondary navigation bar. The Status History section displays a separate row to show each prior status, the fund(s) changed to this status, the date the status **was** changed, and the name of the user who made the change.

   Note: ESD will only update status when the budget extension has been approved by the school district board of directors.

2. To update the status, select 'Ready for OSPI Review' in the *Status* dropdown and click the **Update** button. After the status is updated, a new row will display in the Status History with this updated information.

   Note: You can send the extension back to the district if changes are needed. To do so, select 'Return to School District' in the status dropdown.

Print the Certification Page (All Users)

1. Once the status of the extension is 'Ready for OSPI Review', the Certification document can be printed. If you go to the **Print Reports** screen. Check the box for the Certification report. Select the preferred file Format (PDF (default), Word, Excel), then click the **View Report** button.

2. The document will download. To view the certificate document, click the Open File hyperlink.

3. The default file type is PDF. You may save 🖫 the report or print 🖶 using the options by clicking the ellipse (…) in the upper right-hand corner of the PDF screen.

Note: The Lock and Print Date is set when the status is changed to 'Ready for OSPI Review'. If the status is set back to 'Return to School District' and set again to 'Ready for OSPI Review', this date is updated.

Select an Extension (OSPI Users)

1. After the ESD user has set the status to 'Ready for OSPI Review', OSPI users can review the extension. After logging in, click the F-200 tab in the top navigation bar. The first screen you will see is the List Budget Extension screen.

   You will see a Go button next to a budget document if the status is 'Ready for ESD Review' or higher.

   Note: The default view is to not include any extensions that have *not* been started. Deselect the check box for **Exclude Not Started** field if wish to see all extensions, including those not started.

2. To see all extensions ready for OSPI to review, select 'Ready for OSPI Review' in the *Budget Extension Status* dropdown and leave all other dropdowns as 'All'. Click the **List Extensions** button. The districts with extensions in this status will display.

3. To go into a given extension, click the Go button for that district's extension. You will be taken to the **Input Data** screen. You can review data, run edits, update the status, and print the extension report.

Note: When you go into a budget that is 'Ready for OSPI Review', the status is changed automatically to 'Under Review by OSPI'.

Update the Status (OSPI Users)

1. After you have reviewed the extension and verified it is accurate, you are ready to update the status. Click the **Update Status** tab in the secondary navigation bar. In the Status History section, a separate row is displayed for each prior status, the fund(s) changed to this status, the date the status was changed, and the name of the user who made the change.

2. To update the status to approved, select 'Filed/Approved' in the *Status* dropdown and click the **Update** button. After the status is updated, a new row will display with this updated information.

   Note: You can send the extension back to the ESD if changes are needed. To do so, select 'Return to ESD' in the *Status* dropdown.

3. The **List Budget Extensions** screen will display the *Extension Status* of 'Filed/Approved'.

Use DocuSign to Approve Certifications (SD)

1. Once the ESD has moved the extension status to 'Ready for OSPI Review', SD will be notified that the fund Certification is ready for signing. Click on the **Certification** tab on the navigation bar to open the Certification page.

   Note: The budget must be in 'Ready for OSPI Review' or higher in order for the certificate to be enabled for signing.
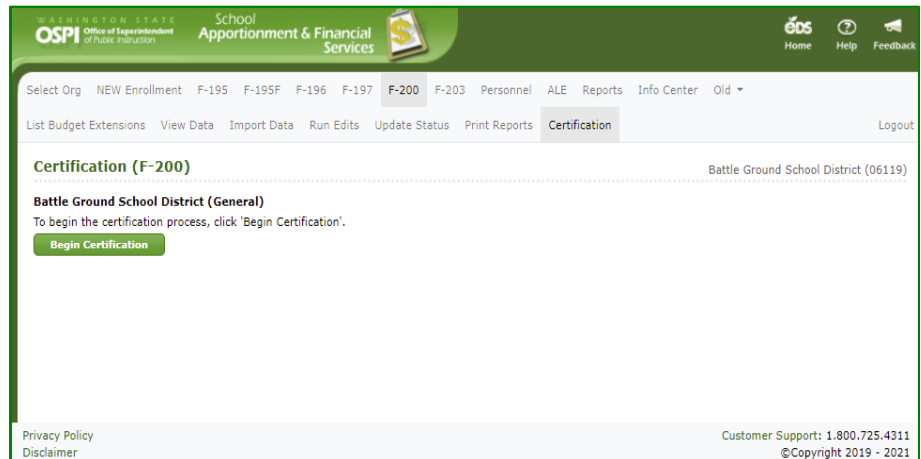
Begin Certification

1. Click the **Begin Certification** button. After a few moments, the DocuSign frame will appear within the screen. Once the DocuSign window opens, read the Electronic Record and Signature Disclosure, and click the required check box to continue, '*I agree to use electronic records and signatures.*'

   Note: This disclosure consent will only appear the first time you open DocuSign for certification.
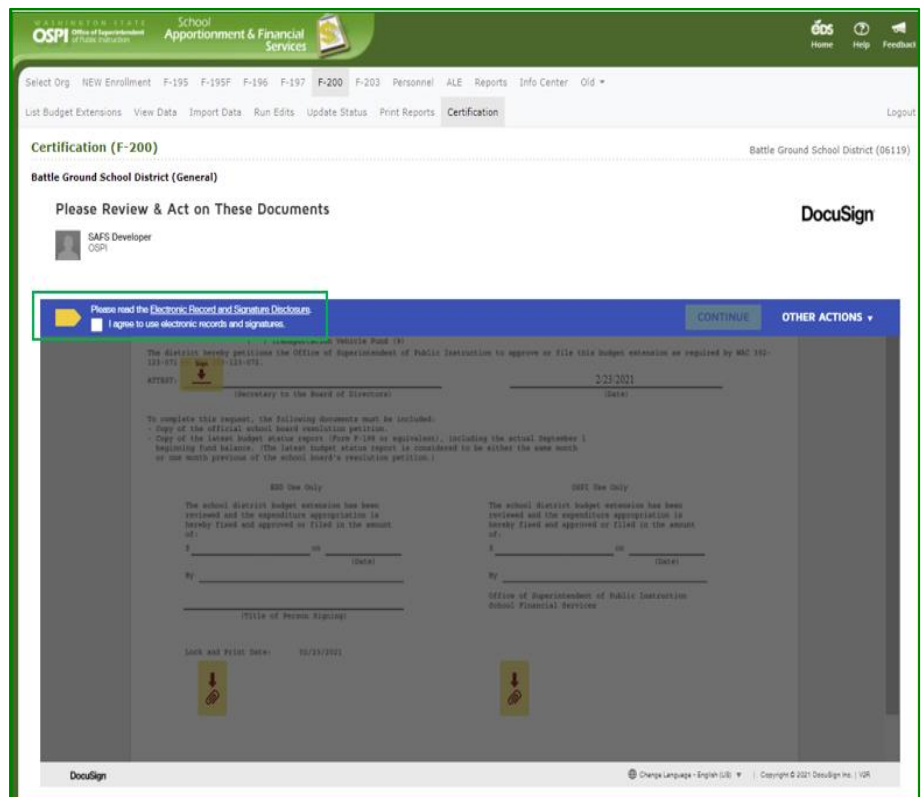
2. Once you select the disclosure check box, the yellow CONTINUE button will appear. Click the **CONTINUE** button.
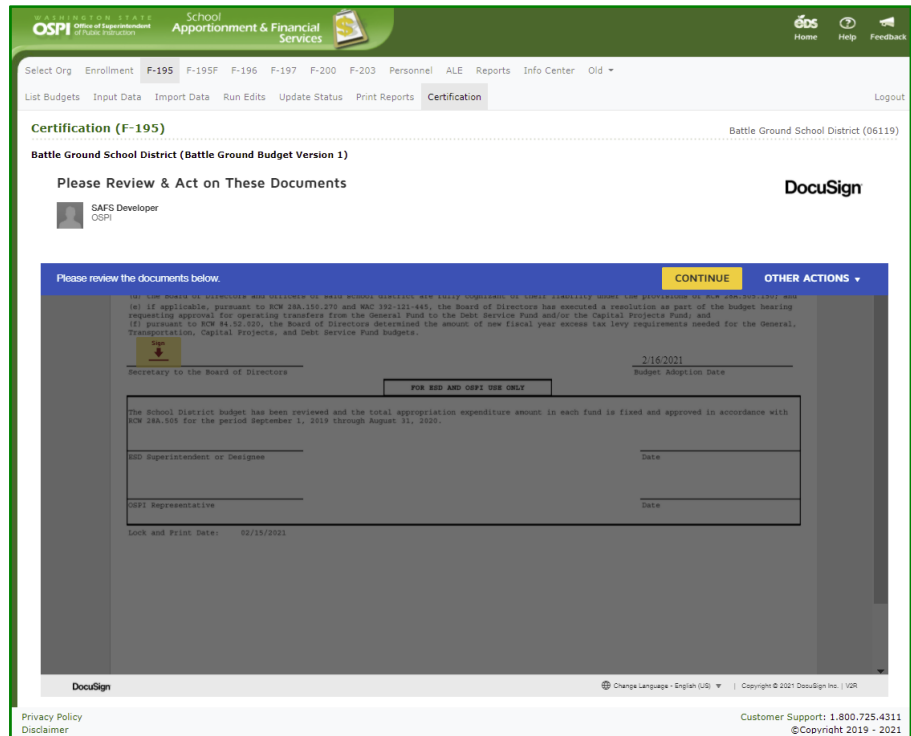
3. The certification displays within a frame inside your Certification screen.

   Note: In order for you to complete the signing for the Certification, you are required to attach two documents:
   1. **School Board Acceptance Resolution Petition**
   2. **Budget Status Report**.

4. Review the certificate when it opens in the screen. Click the yellow **START** button and the **SIGN** arrow will move to the signature line. Click on the yellow **Sign** icon to add your signature.

   Note: The **From** and **To** amounts will automatically populate from the system.

   Note: The final signed **Date** for your approval will be added automatically when you click FINISH.

Add Attachments

1. The yellow **NEXT** indicator will then move you down the page to add the required attachments. Hover over the paperclip button with your mouse and it will display what document you need to attach.

   Click on the first paperclip icon to add the attachment.

   NOTE: You will *not* be able to Finish the signing until these documents are attached:

   - **School Board Acceptance Resolution Petition**

   - **Budget Status Report**.

   You can always come back to sign later when you have the documents ready. See [Finish Signing Later](#) section.
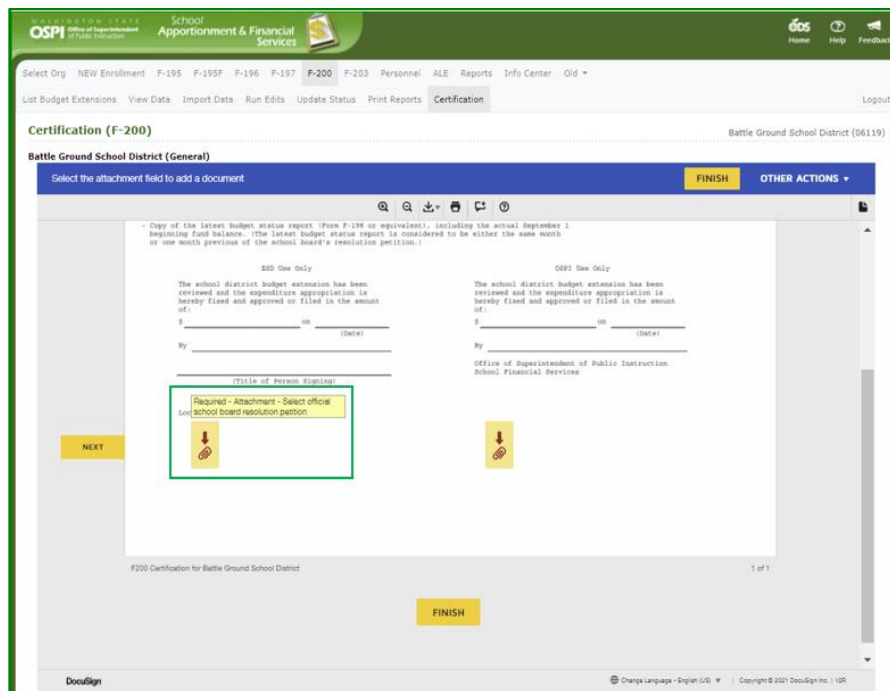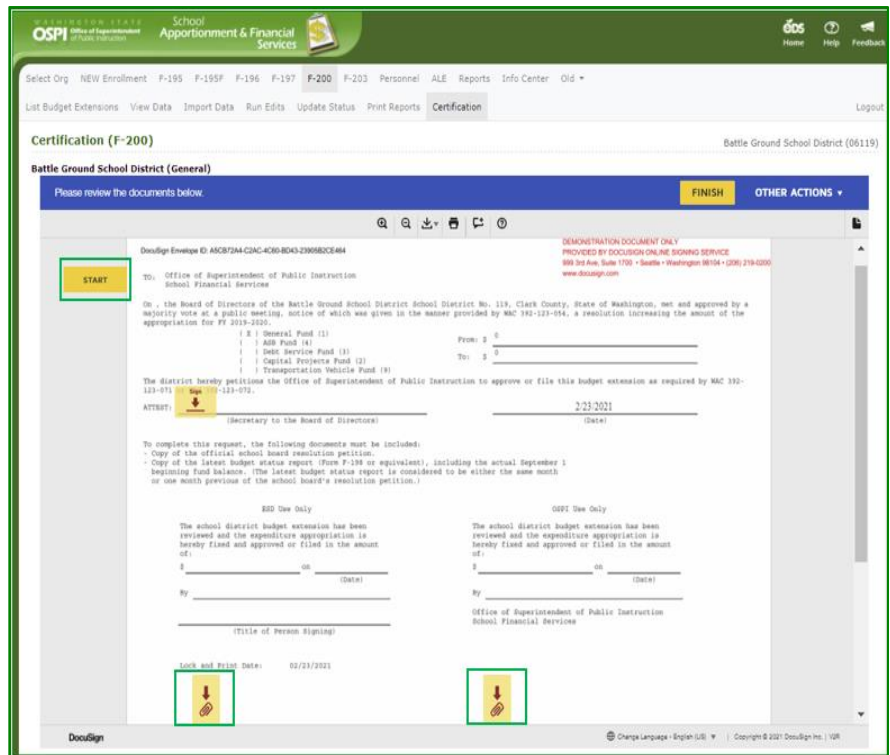
2. When the **Upload Attachment** pop-up window opens, click the **UPLOAD A FILE** button.
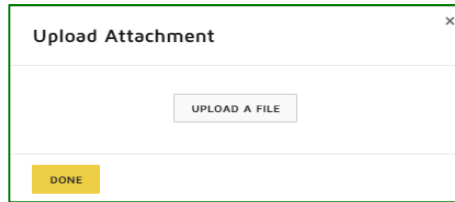
3. Select your file and click **DONE** to attach to the certification. The paperclip icon will turn grey and the document will appear in the DocuSign frame below the certification.
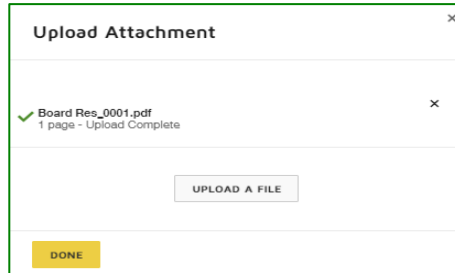
Note: To remove the attachment and replace with another document. Click on the grey paperclip, and in the Upload Attachment window, click on the "**x**" next to the document you want to delete. Repeat Step 2 and 3 to add a new document.
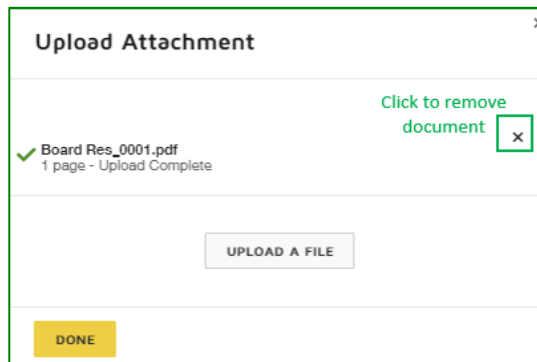
4. To attach the Budget Status Report, click on the second paperclip icon, and complete steps 2 and 3 above.

5. Once you have attached both documents, scroll down below the certification to confirm you attached the correct documents.
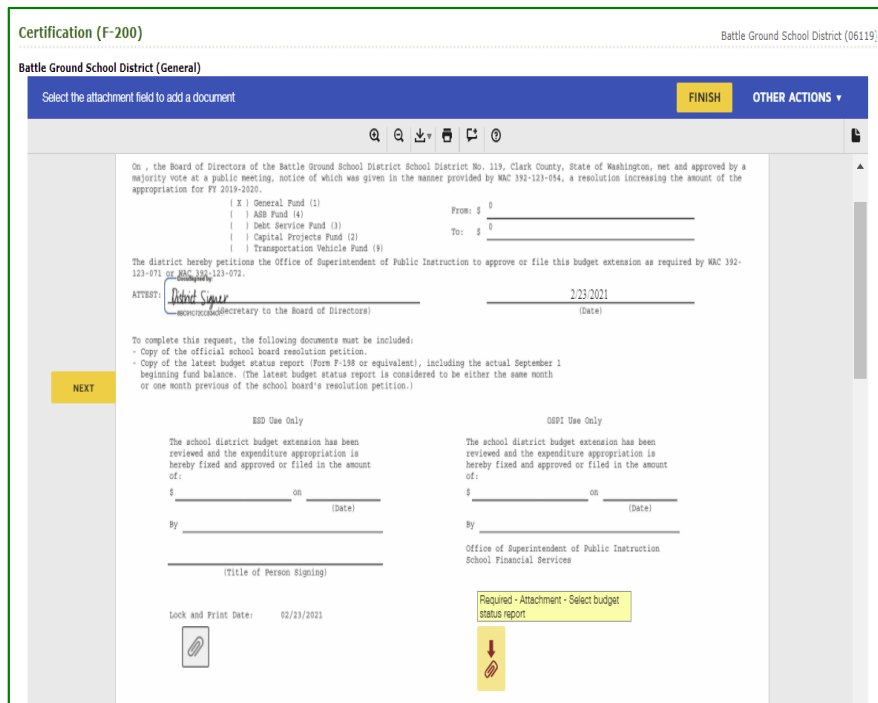
Finish Signing Document

1. Click the yellow **FINISH** button at top of the frame to complete the approval signing. An email will automatically be sent to the ESD notifying them that the extension certification is ready for the ESD to sign.
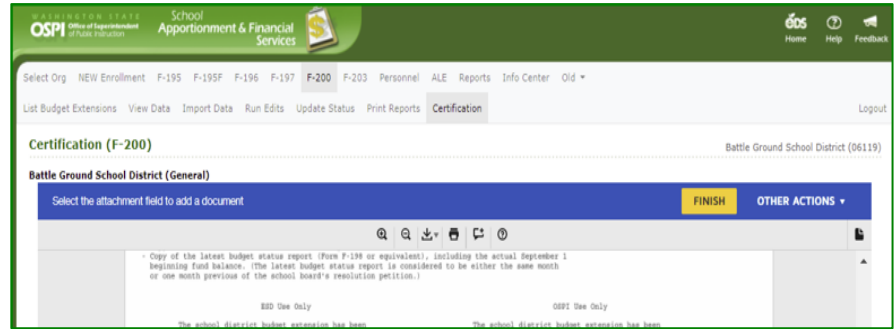
2. Once you have signed the certification, a **View Document** button appears on the Certification page allowing you to view the certification only; the attachments will not display.

   Note: The signatures will not appear on the certification until OSPI signs the certification.
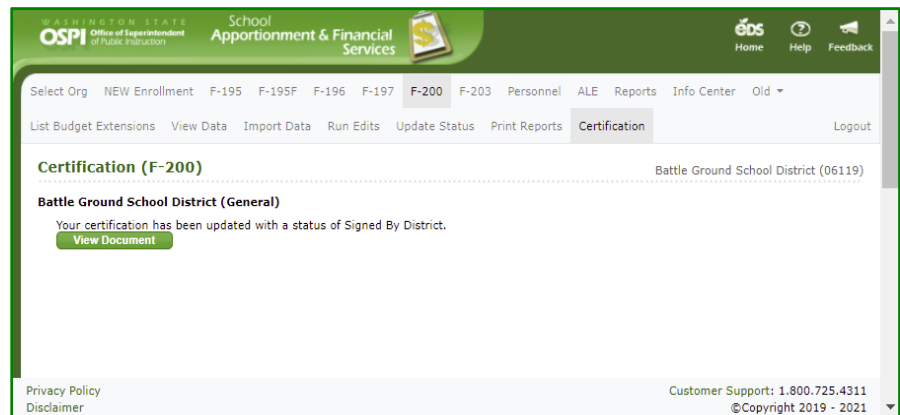
3. The Budget Extension document now has a *Certification Status* of 'Signed by District' on the List Budget screen.

Finish Signing Later

1. There may be a time when you need to come back to review and complete the signing. To stop the DocuSign process, click the **OTHER ACTIONS** button at top of document, and select the **Finish Later** option.

2. The DocuSign window will close, and the Certification screen will display, 'Your certification has begun', and a **Sign Document** button.

3. Once you open the DocuSign certification window, the *Certification Status* is automatically changed to 'Started by District' on the List Budget Extensions page.
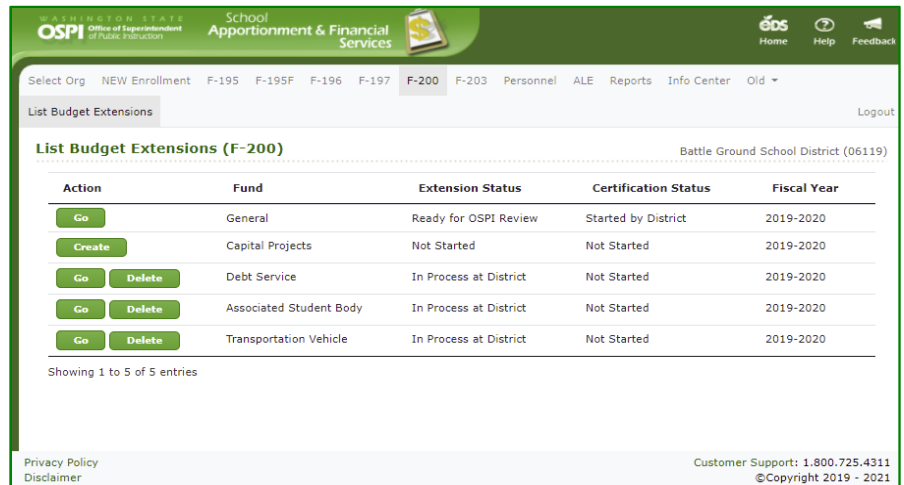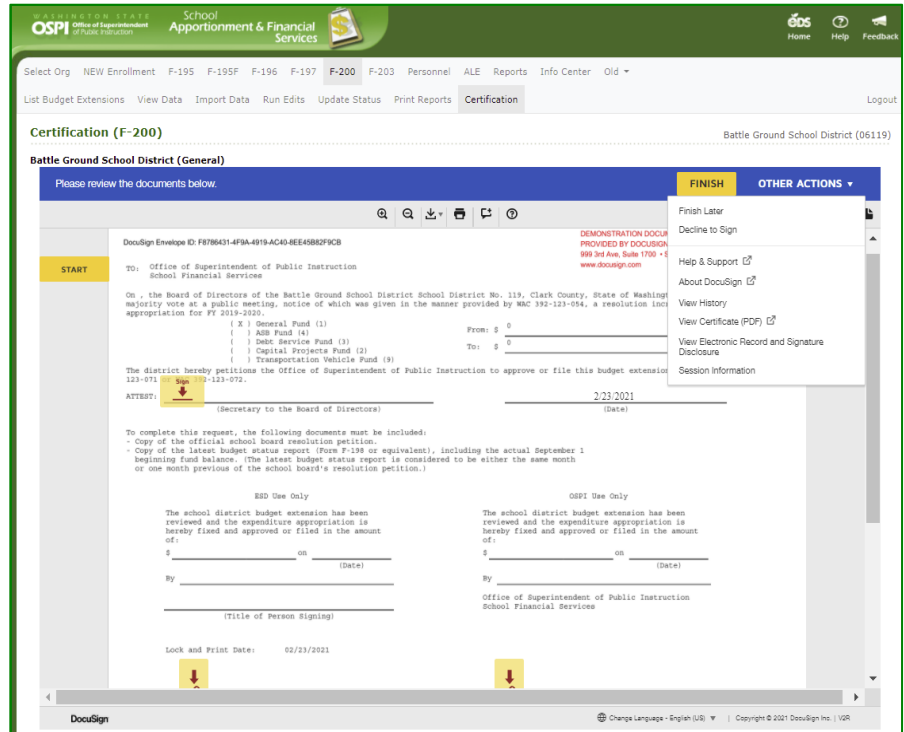
Return to Sign Document

1. When you go back into the **Certification** tab again, the Certification screen will display a Sign Document button. Just click the **Sign Document** button to sign the document.
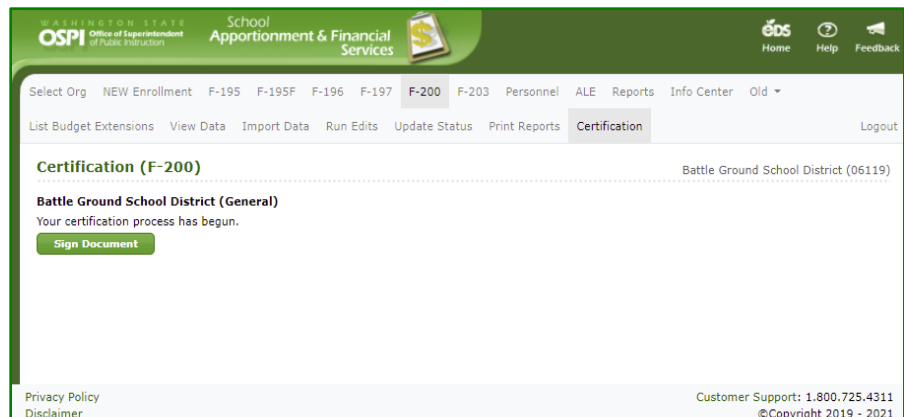
Decline Certification

1. If you decide that the certification document is incorrect and needs to be voided, then click the **OTHER ACTIONS** button, at top of document, and then select the **Decline to Sign** option.

   Note: The Decline to Sign option always sets the *Certification Status* back to '**Not Started'**. It will **not** change the *Extension Status*. If you need to change the Extension Status, contact your ESD.
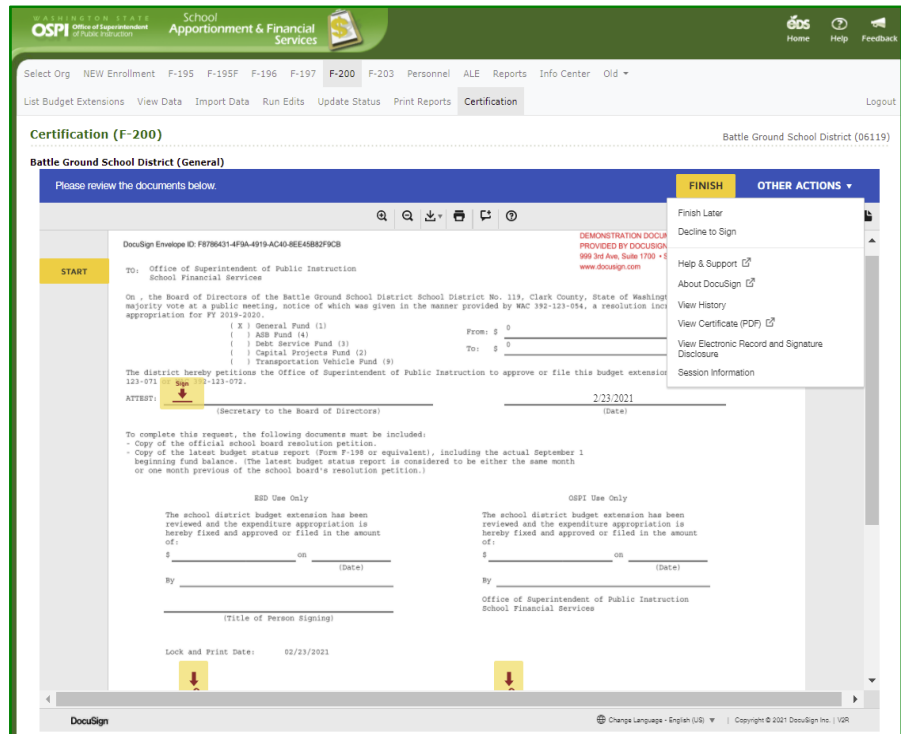
2. In the pop-up Caution window, click the yellow **CONTINUE** button. If you decide you do not want to decline, click the CANCEL button.
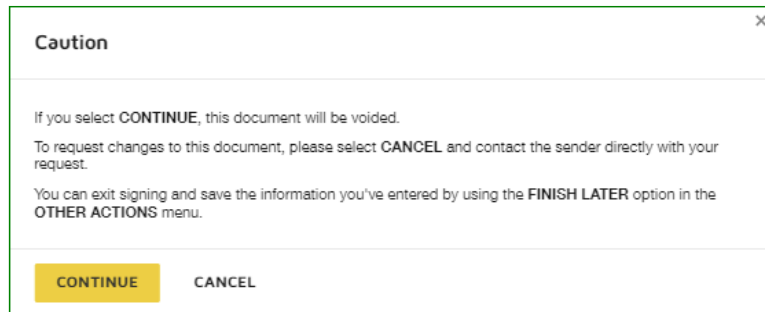
3. Enter the reason for declining in the Decline to Sign window text box, then click the yellow **DECLINE TO SIGN** button.

   Note: Do not check the box at bottom. *DocuSign requires for this language to be displayed.* If selected, it will display the disclosure consent check box again when log back into DocuSign.
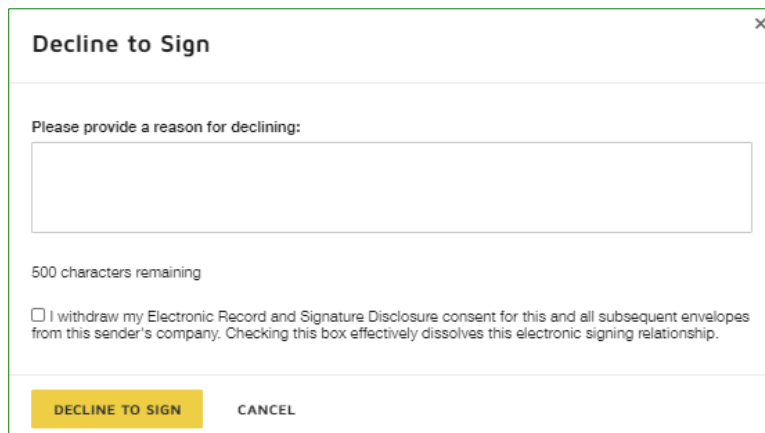
Use DocuSign to Approve Certifications (ESD)

1. Once the SD has signed the Certification, an email is sent to the ESD notifying that the certification is ready for signing. Navigate to the SD extension document and click Go.

   Note: The budget must be in 'Ready for OSPI Review' or higher in order for the certificate to be enabled for signing.

2. The View Data screen opens, click on the **Certification** tab on the navigation bar to open the Certification page. To begin the review and approval, click the **Sign Document** button.

Begin Certification

1. After a few moments, the DocuSign frame will appear within your screen. Once the DocuSign window opens, read the Electronic Record and Signature Disclosure, and click the required check box to continue, '*I agree to use electronic records and signatures.*'

   Note: This disclosure consent will only appear once for the first time you open DocuSign for certification.
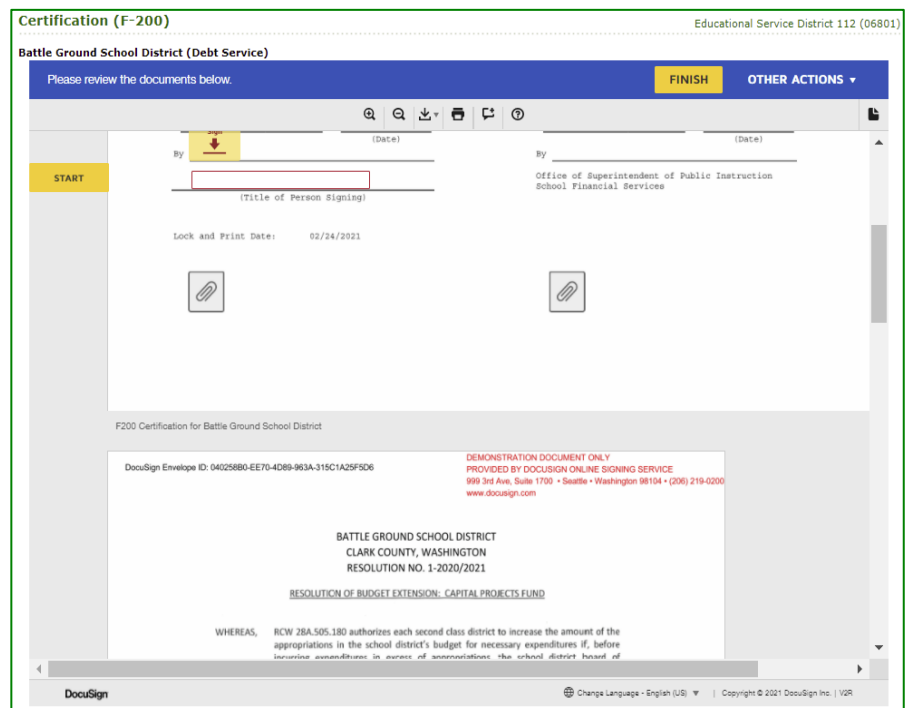
   Note: The budget must be in 'Ready for OSPI Review' or higher in order for the certificate to be enabled for signing.

2. Once you select the disclosure check box, the yellow CONTINUE button will appear. Click the **CONTINUE** button.

View Certification and Attachments

1. The certification will display in the screen. To view the documents the District attached, scroll below the certification document in the DocuSign frame and they will display one after the other.

Finish Signing Document

1. When you are ready to approve the certification, click the yellow **START** button. The yellow **FILL IN** icon will automatically move down to the ESD Use Only section. First enter the approved extension amount, using thousands comma and period decimal separators (e.g., ##,###,###.##).

2. Then tab to the field to type in your **Title**. (You can also use your mouse cursor to move to each field on the certificate.)

   Note: The **From** and **To** amounts will automatically populate from the system.

   Note: The final signed **Date** for your approval will be added automatically when you click **FINISH**.

3. To add your signature, click on the yellow Sign icon. Select your signature and click OK.

4. When you are ready to complete the certification signing, click the yellow **FINISH** button at top of document to complete the approval signing.

5. Once you have signed the certification, a **View Document** button appears on the Certification page allowing you to view the certification only; the attachments will not display.

    Note: The signatures will not appear on the certification until OSPI signs the certification.
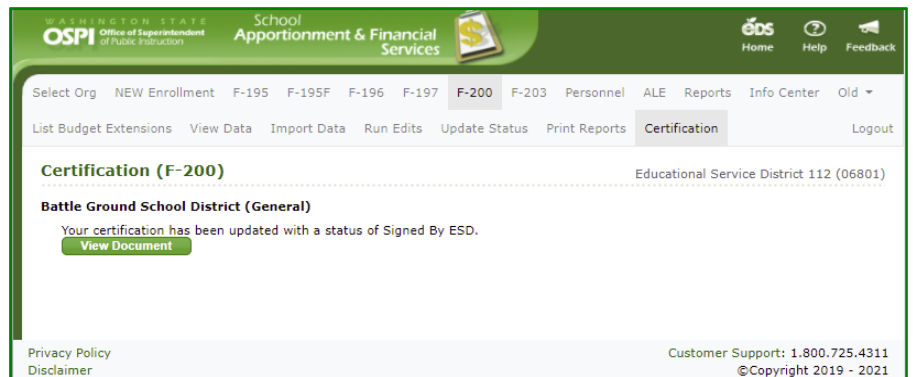
6. The Budget document now has a **Certification Status** of 'Signed by ESD' on the List Budget Extension screen.
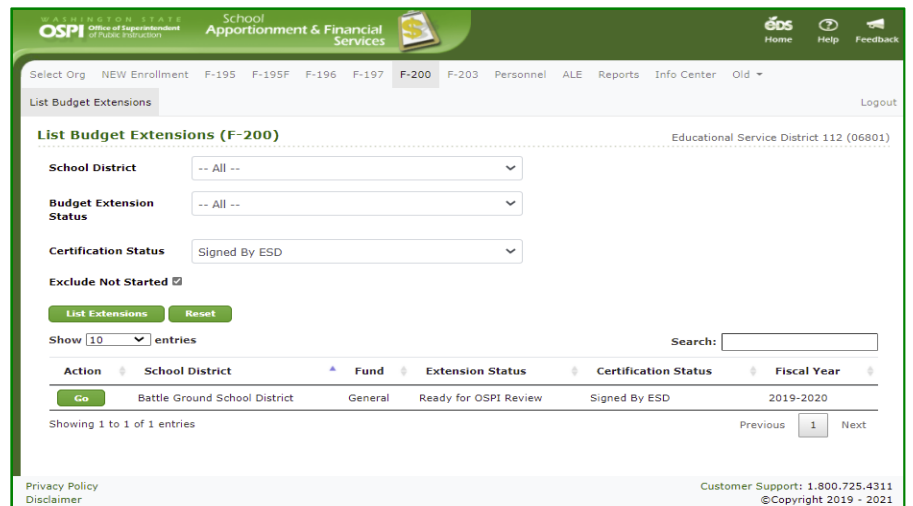
Finish Signing Later

1. There may be a time when you need to come back to review and complete the signing. To stop the DocuSign process, click the **OTHER ACTIONS** button, at top of document, and then select the **Finish Later** option. The DocuSign window will close, and the Certification screen will display, "Your certification process has begun", with a Sign Document button.
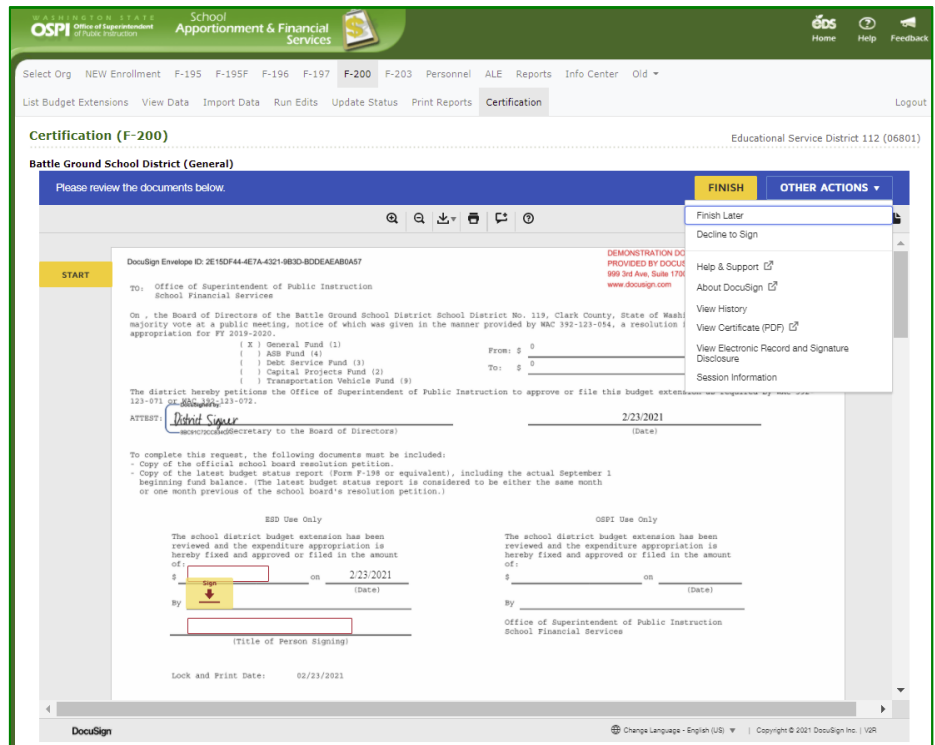
2. Once you open the DocuSign certification window, the **Certification Status** is changed to 'Started by ESD' on the List Budget Extensions page.
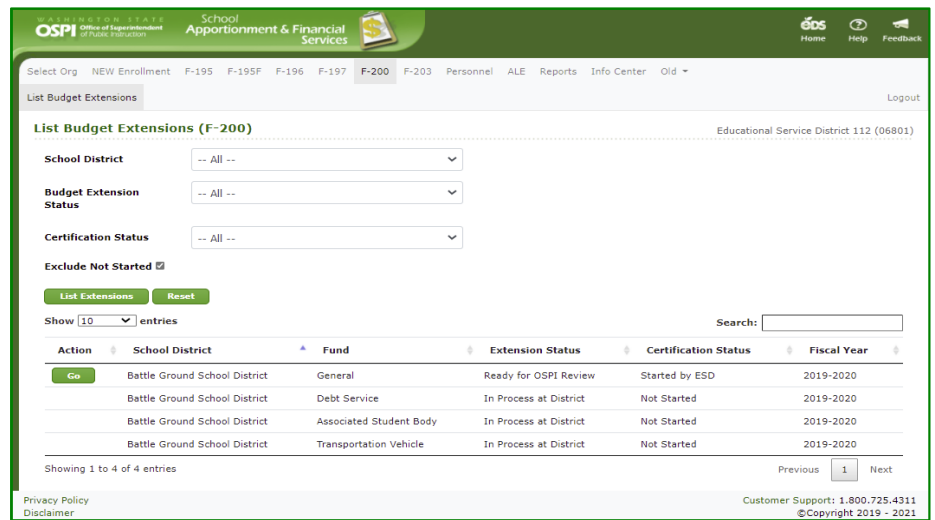
Return to Sign Document

1. When you go back into the **Certification** tab again, the Certification screen will display, 'Your certification process has begun'. Click the **Sign Document** button to sign the document.
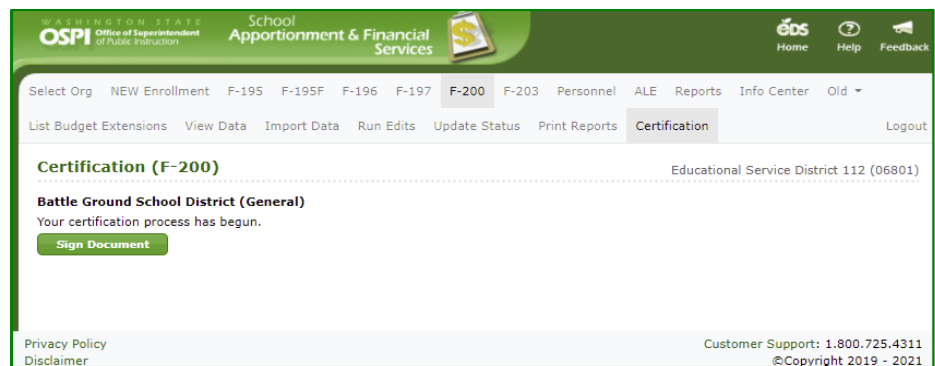
Decline Document

1. If you decide that the certification document is incorrect and needs to be voided, then click the **OTHER ACTIONS** button, at top of document, and then click the **Decline to Sign** option.

   Note: The Decline to Sign option always sets the **Certification Status** back to 'Not Started'. It will not change the Budget Extension Status; you will need to manually change it. See [ESD Update Status](#) section in this guide.
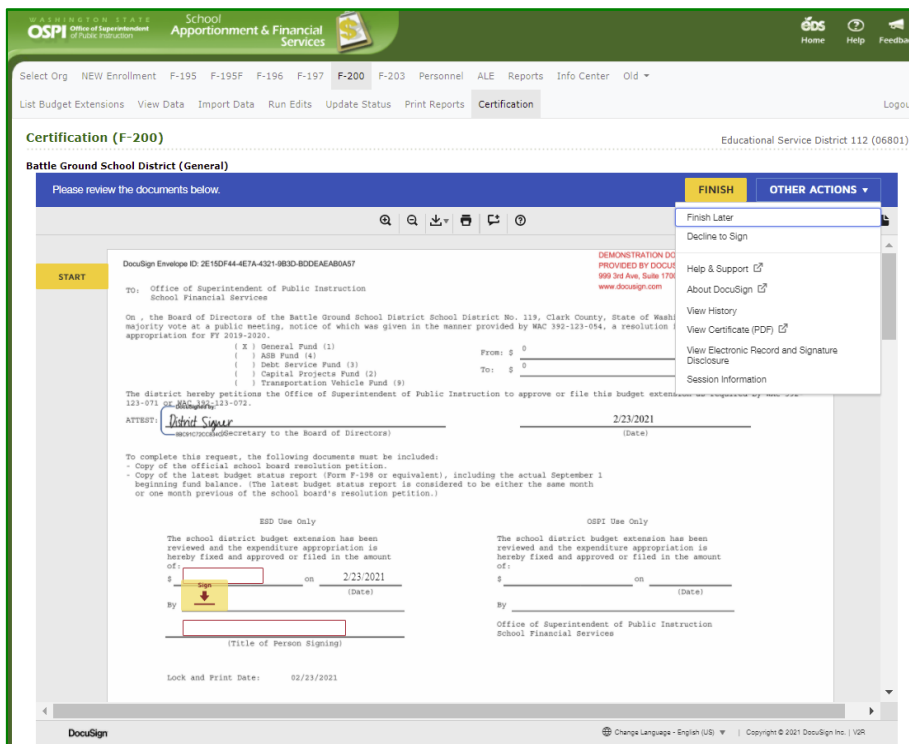
2. In the pop-up Caution window, click the yellow **CONTINUE** button. If you decide you do not want to decline, click the CANCEL button.
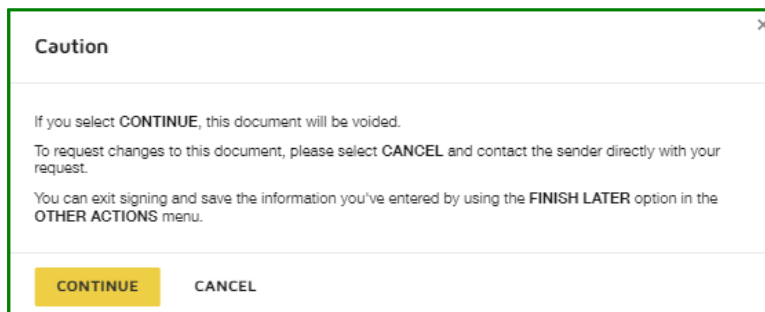
3. Enter the reason for declining in the Decline to Sign window text box, then click the yellow **DECLINE TO SIGN** button.

   Note: Do not check the box at bottom. *DocuSign requires for this language to be displayed.* If selected, it will display the disclosure consent check box again when log back into DocuSign.
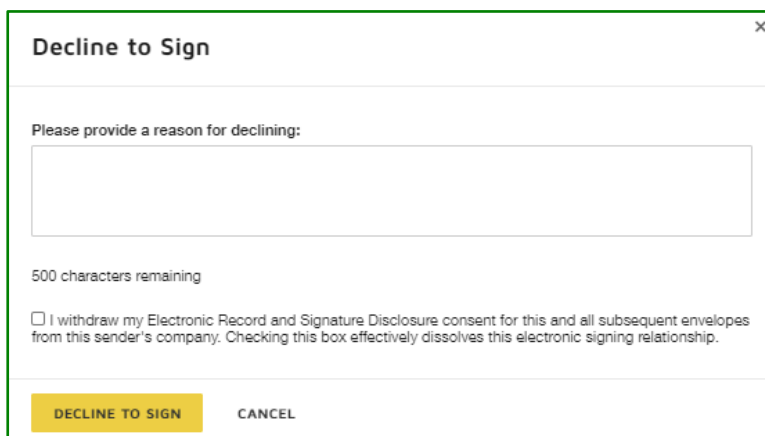
4. After declining the certification, the List Budget Extension screen will display the *Certification Status* as 'Not Started'.

   Note: You will need to manually change the *Extension Status* to allow the district to make necessary updates. See [ESD Update Status](#) section in this guide.

Action	School District	Fund	Extension Status	Certification Status	Fiscal Year
Go	Battle Ground School District	General	Ready for OSPI Review	Not Started	2019-2020
	Battle Ground School District	Debt Service	In Process at District	Not Started	2019-2020
	Battle Ground School District	Associated Student Body	In Process at District	Not Started	2019-2020
	Battle Ground School District	Transportation Vehicle	In Process at District	Not Started	2019-2020

Use DocuSign to Approve Certifications (OSPI)

1. Once the ESD has signed the Certification, OSPI may go into the certification to review and approve. OSPI users do not receive an email notification when the certification is ready for signing. You will need to filter in the List Budget Extensions screen for Certification *Status* of 'Signed by ESD'.

   Note: The budget must be in 'Ready for OSPI Review' or higher in order for the certificate to be enabled for signing.

2. Navigate to the SD Budget document and click on the **Certification** tab on the navigation bar to open the Certification page. To begin the approval, click the **Sign Document** button.

Begin Certification

1. After a few moments, the DocuSign frame will appear within the screen.
Once the DocuSign window opens, read the Electronic Record and Signature Disclosure, and click the required check box to continue, '*I agree to use electronic records and signatures.*'

   Note: This disclosure consent will only appear the first time you open DocuSign for certification.

2. Once you select the disclosure check box, the yellow CONTINUE button will appear. Click the **CONTINUE** button.

View Certification and Attachments

1. The certification will display in the screen. To view the documents the District attached, scroll below the certification document in the DocuSign frame and they will display one after the other.

Finish Signing Document

1. When you are ready to approve the certification, click the yellow **START** button. The yellow **NEXT** icon will automatically move down to the OSPI Use Only section. First enter the approved extension amount, using thousands comma and period decimal separators (e.g., ##,###,###.##).

2. To add your signature, click on the yellow Sign icon. Select your signature and click OK.

   Note: The **From** and **To** amounts will automatically populate from the system.

   Note: The final signed **Date** for your approval will be added automatically when you click **FINISH**.

3. When you are ready to complete the certification signing, click the yellow **FINISH** button at top of document to complete the approval signing.

4. Once you have signed the certification, a **View Document** button appears on the Certification page allowing you to view only the certification document with entered data and signatures.

   To view or print all of the *final* 'Complete' documents **with attachments**, you will need to log into the DocuSign portal: https://www.docusign.com/ and go to '*Completed Documents'.*

5. The Budget document now has a **Certification Status** of 'Complete' on the List Budget screen.

6. Once OSPI signs the certification, email notifications are *not* sent to the SD and ESD. The SD and ESD will need to go to their List Budget Extensions screen to view the Certification Status for the budget.

7. The ESD can filter the *Certification Status* for 'Complete' on their List Budget Extensions screen.
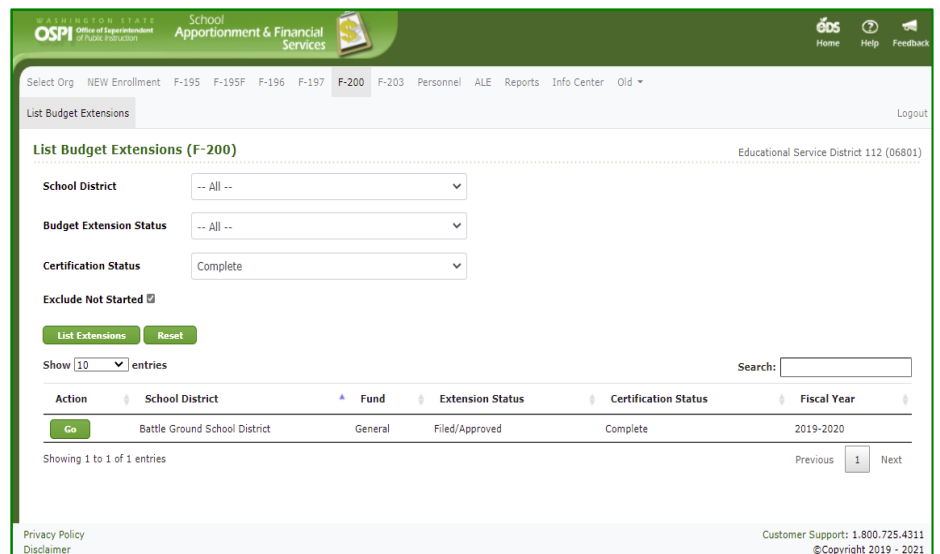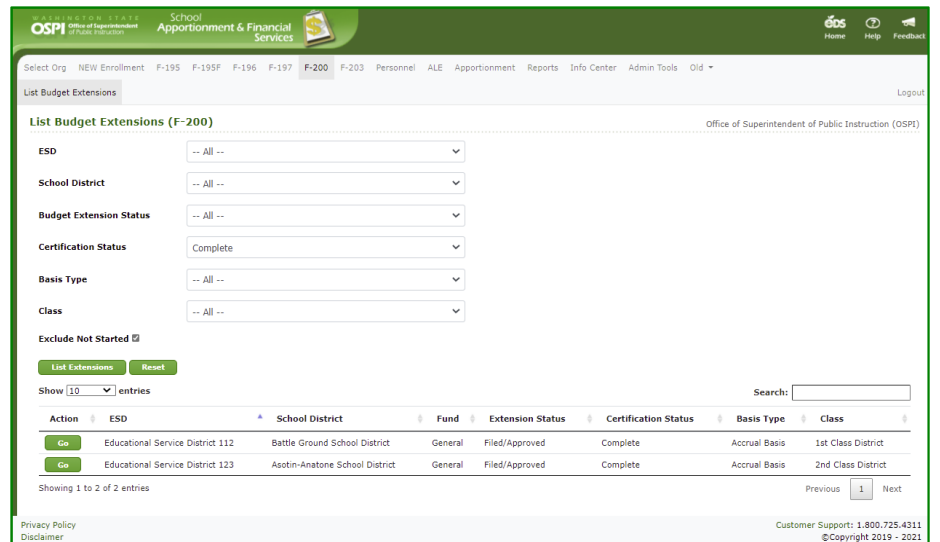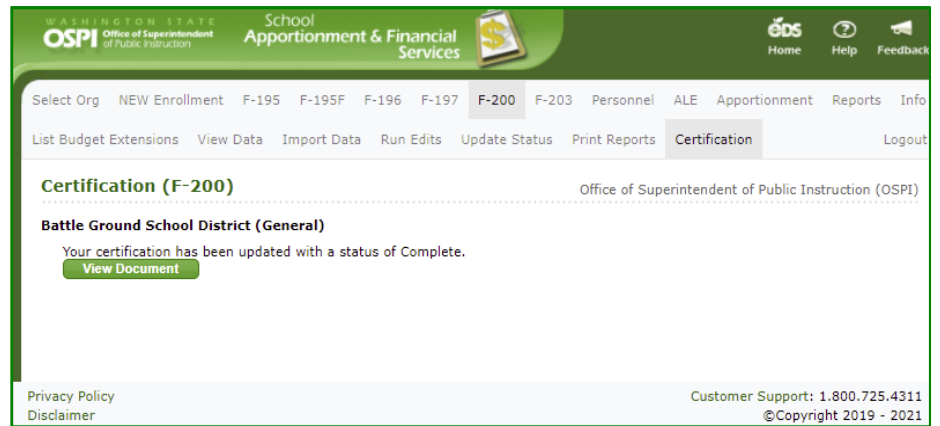
Finish Signing Later

1. There may be a time when you need to come back to review and complete the signing. To stop the DocuSign process, click the **OTHER ACTIONS** button, at top of document, and then click the **Finish Later** option.

   The DocuSign window will close, and the Certification screen will appear saying, "The document has been signed by the ESD", with a Sign Document button.
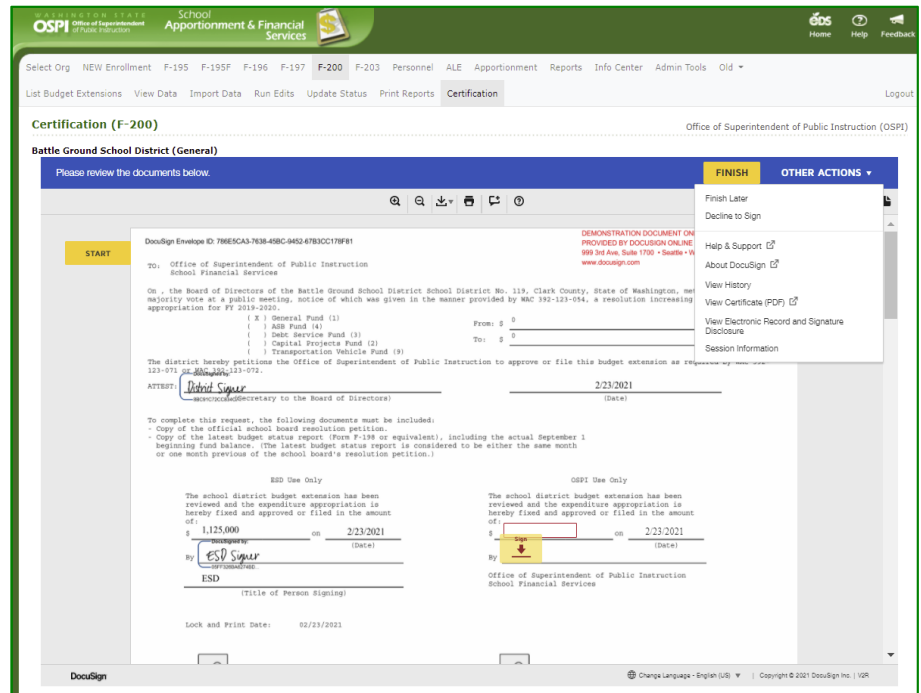
2. On the List Budget page, the **Certification Status** still displays 'Signed by ESD'. OSPI users do **not** have a certification status indicating OSPI has started their signing.
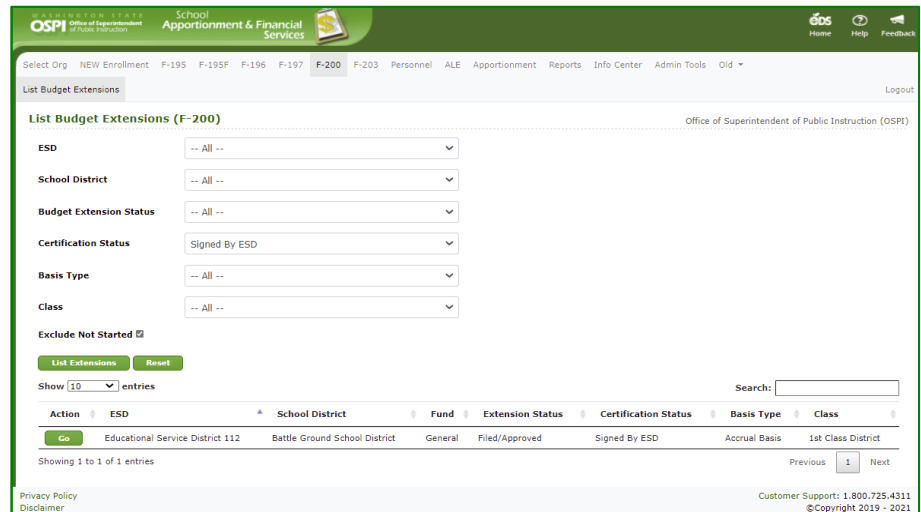
Return to Sign Document

1. When you go back into the **Certification** tab again, the Certification screen will display "The document has been signed by the ESD". Click the **Sign Document** button to sign.

Decline Document

1. If you decide that the certification document is incorrect and needs to be voided, then click the **OTHER ACTIONS** button, at top of document, and then click the **Decline to Sign** option.

   Note: The Decline to Sign option always sets the *Certification Status* back to 'Not Started'. It will **not** change the Extension Status. A 'Filed/Approved' extension cannot have its Extension Status changed back to 'Return to ESD'. The District can just create another extension for the fund with the corrected data.

2. In the pop-up Caution window, click the yellow **CONTINUE** button. If you decide you do not want to decline, click the CANCEL button.

3. Enter the reason for declining in the Decline to Sign window text box, then click the yellow **DECLINE TO SIGN** button.

   Note: Do not check the box at bottom. *DocuSign requires for this language to be displayed.* If selected, it will display the disclosure consent check box again when you log back into DocuSign.