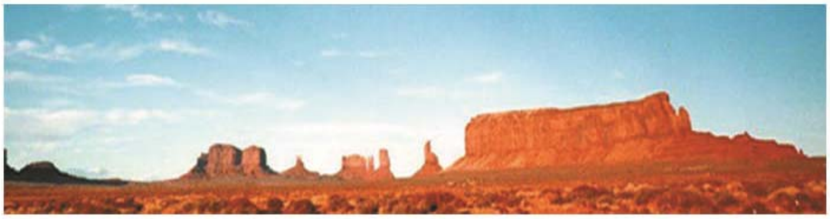
B2GNOW

Software for Government

Staff User Manual

Chapter 13 – Goal Plans



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Printed in the United States of America
Third Edition

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Chapter 13 – Goal Plans

Using the B2Gnow system, state agencies, authorities and boards can directly submit Goal Plans. These plans include the percentages and amounts an agency plans to spend with certified businesses, along with supporting documentation. Once submitted, the approving agency reviews the information to ensure the submitting agency is making the necessary efforts to meet established contracting goals.

In this chapter, submitting and approving agencies learn how to work with goal plans and documents. Because tasks for both roles are covered, please note whether specific tasks are procedures submitting agencies or approving agencies can complete.

Submitting goal plans for acceptance

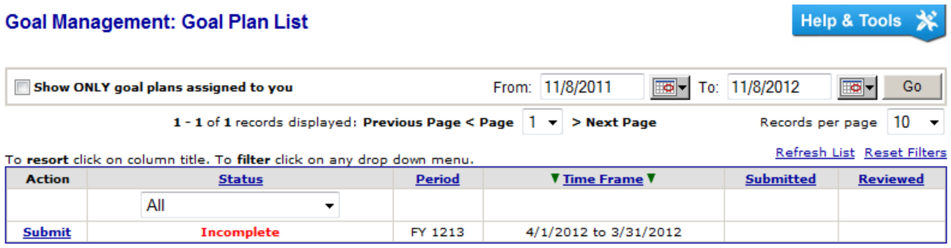
Goal plans must be submitted annually and must detail how the submitting agency plans to meet contracting goals with certified businesses. The electronic goal plan is automatically created by the system prior to the start of every fiscal year. You, as the submitting agency, can begin adding information and documentation as soon as the goal plan is available. Annual goal plans are due by January 15th of every year.

Accessing the Goal Plan List

The Goal Plan List displays a list of goal plans for submitting and approving agencies to view. Depending on your agency role, whether submitting or accepting goal plans, the information displayed may differ. For example, submitting agencies can view, submit, or resubmit goal plans. The approving agency can view goal plans for acceptance.

To access the Goal Plan List

1. From the **View** menu in the navigation bar, click **Goal Plans**.
   The Goal Management: Goal Plan List page displays.
2. To view a specific plan, in the **Action** column, click the **View, Submit,** or **Resubmit** hyperlink for the plan you want to open.



Goal Management: Goal Plan List

☐ Show ONLY goal plans assigned to you From: 11/8/2011 To: 11/8/2012 Go

1 - 1 of 1 records displayed: Previous Page < Page 1 > Next Page Records per page 10

To **resort** click on column title. To **filter** click on any drop down menu.

Action	Status	Period	▼Time Frame▼	Submitted	Reviewed
	All				
Submit	Incomplete	FY 1213	4/1/2012 to 3/31/2012		

3. To filter the list and view an older plan, change the **From** and/or **To** dates and click **Go**.
4. To return to the original view, click the **Reset Filters** hyperlink on the right.
5. To show all plans for your agency, clear the **Show ONLY goal plans assigned to you** check box.

Viewing and completing goal plans

After opening a goal plan, the Goal Management: Submit Goal Plan page displays. You can view and enter information through the following areas:

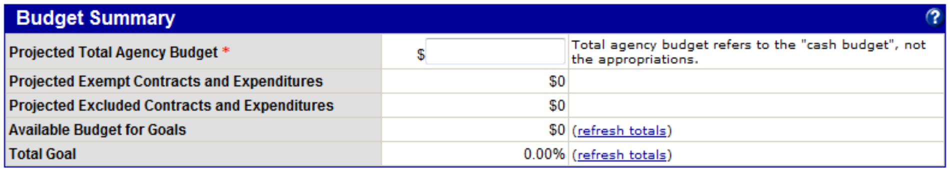
- **Goal Plan** - summarizes the agency, reporting period, and plan status.
- **Budget Summary** - allows you to enter the amount your agency intends to spend to meet plan goals.
- **Exemptions** - allows you to enter a budget amount that is exempt from goal plans, such as utilities and intra-government expenditures.
- **Exclusions** - allows you to enter an anticipated contract amount for expenditures made in areas where no capable certified firms exist to provide the goods and materials or complete the work.
- **Goal Details** - lists the percentages and amounts your agency will use to meet plan goals in the Commodities, Construction Consultants, Construction, and Services/Consultants industries.
- **Goal Plan Documents** - allows you to attach required documents that support your goal plan.
- **Additional Information** - allows you to add comments or other additional information to your goal plan.

Completing the goal plan form

You use the fields, hyperlinks, and buttons to enter comprehensive information about your goal plan.

To add the budget summary amount for a goal plan

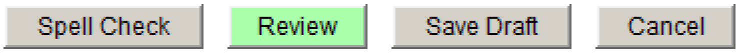
1. In the **Budget Summary** box, in the **Projected Total Agency Budget** field, enter the amount of the agency's annual budget.



Budget Summary

Projected Total Agency Budget *	$	Total agency budget refers to the "cash budget", not the appropriations.
Projected Exempt Contracts and Expenditures	$0	
Projected Excluded Contracts and Expenditures	$0	
Available Budget for Goals	$0	(refresh totals)
Total Goal	0.00%	(refresh totals)

2. To view the updated amount available for meeting goals at any time, click the **refresh totals** hyperlink.
3. To save your work, click **Save Draft** at the bottom of the page, and then click **OK**. Once the information has been saved, you can return at any time to continue entering data.



Entering budget exemptions for goal plans

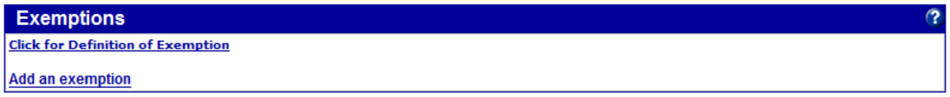
You can identify certain types of payments from your goal plan as **exempt**, such as utilities, travel reimbursements, postage, and staff benefits. These amounts are subtracted from the Projected Total Agency Budget. Specific categories are pre-approved for exemptions; if you are seeking exemptions in additional categories, first contact your agency liaison for guidance.

You add exemption items individually, specifying the exemption type and reason for including the exemption. Each exemption displays in the Exemptions box, and the total exemption amount displays in the Projected Exempt Contracts and Expenditures field in the Budget Summary box.

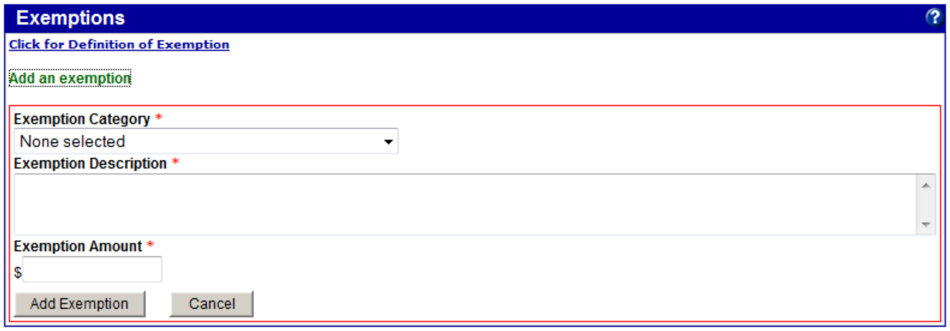
You can edit or delete any exemptions in the list.

To enter budget exemptions for goal plans

1. In the **Exemptions** box, click the **Add an exemption** hyperlink.

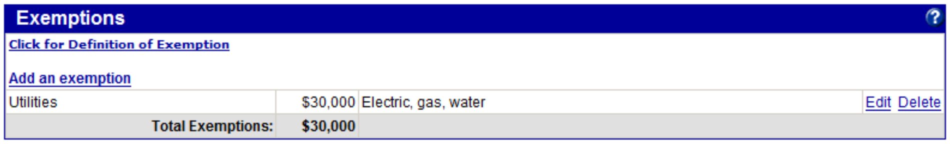

Exemptions
?
Click for Definition of Exemption
Add an exemption

2. From the **Exemption Category** list, select the type of exemption you want to enter.


Exemptions
?
Click for Definition of Exemption
Add an exemption
Add Exemption
Cancel

Exemption Category *
None selected
Exemption Description *
Exemption Amount *
$

3. In the **Exemption Description** field, enter the reason for the exemption.
4. In the **Exemption Amount** field, enter the amount you want to exempt from the goal plan.
5. Click **Add Exemption**.
   The exemption displays in the list.

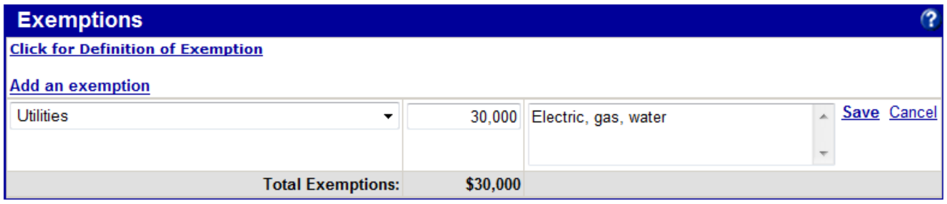

Exemptions
?
Click for Definition of Exemption
Add an exemption

Utilities	$30,000	Electric, gas, water	Edit Delete
Total Exemptions:	$30,000		

6. Continue adding exemptions until all exempted payment amounts have been entered.
7. To save your work, click **Save Draft**, and then click **OK**.

To edit or delete a budget exemption

1. To edit an exemption, in the **Exemptions** box, click the **Edit** hyperlink for the exemption you want to update.
2. Update the exemption information and click **Save**.


Exemptions
?
Click for Definition of Exemption
Add an exemption
Save
Cancel

Utilities	30,000	Electric, gas, water	Save Cancel
Total Exemptions:	$30,000		

3. To delete an exemption, in the **Exemptions** box, click the **Delete** hyperlink for the exemption you want to delete, and then click **OK**.

Entering budget exclusions for goal plans

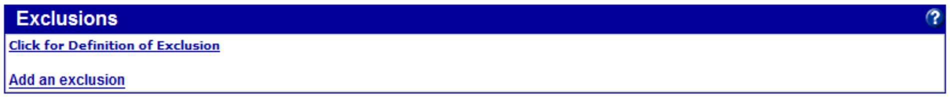
If the submitting agency thoroughly researches the pool of certified firms and absolutely cannot find certified businesses to complete a service or provide specific goods and materials, the contract may be able to be excluded from the goal plan. Exclusions must be reviewed and accepted by the approving agency. These amounts are subtracted from the Projected Total Agency Budget.

Exclusion items are added individually, specifying the exclusion category and reason for including the exclusion. Each exclusion displays in the Exclusions box, and the total exclusion amount displays in the Projected Excluded Contracts and Expenditures field in the Budget Summary box.

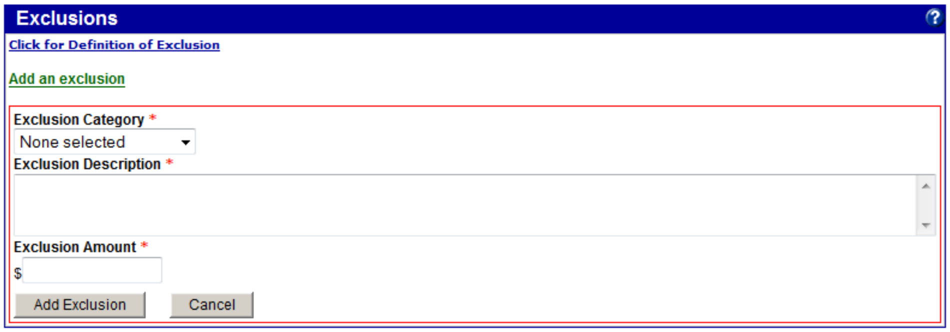
You can edit or delete any exclusions in the list.

To enter budget exclusions for goal plans

1. In the **Exclusions** box, click the **Add an exclusion** hyperlink.

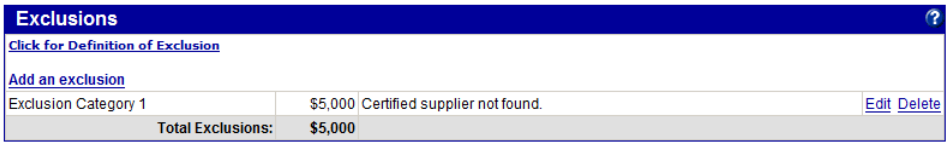

Exclusions
?
Click for Definition of Exclusion
Add an exclusion

2. From the **Exclusion Category** list, select the type of exclusion you want to enter.


Exclusions
?
Click for Definition of Exclusion
Add an exclusion
Add Exclusion
Cancel

Exclusion Category *
None selected
Exclusion Description *
Exclusion Amount *
$

3. In the **Exclusion Description** field, enter the reason for the exclusion.
4. In the **Exclusion Amount** field, enter the amount you want to exclude from the goal plan.
5. Click **Add Exclusion**.
   The exclusion displays in the list.

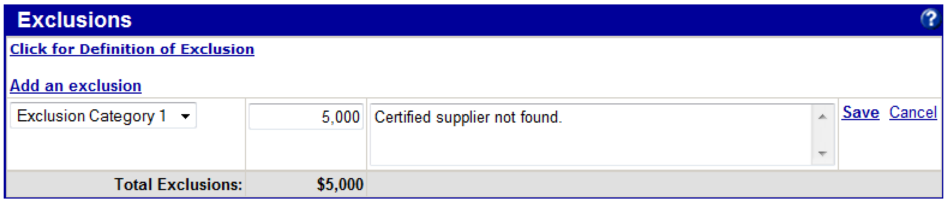

Exclusions
?
Click for Definition of Exclusion
Add an exclusion

Exclusion Category 1	$5,000	Certified supplier not found.	Edit Delete
Total Exclusions:	$5,000		

6. Continue adding exclusions until all exclusion payment amounts have been entered.
7. To save your work, click **Save Draft**, and then click **OK**.

To edit or delete a budget exclusion

1. To edit an exclusion, in the **Exclusions** box, click the **Edit** hyperlink for the exclusion you want to update.
2. Update the exclusion information and click **Save**.



Exclusions

Click for Definition of Exclusion

Add an exclusion

Exclusion Category 1	5,000	Certified supplier not found.	Save Cancel
Total Exclusions:	$5,000		

3. To delete an exclusion, in the **Exclusions** box, click the **Delete** hyperlink for the exclusion you want to delete, and then click **OK**.

Specifying goal details for goal plans

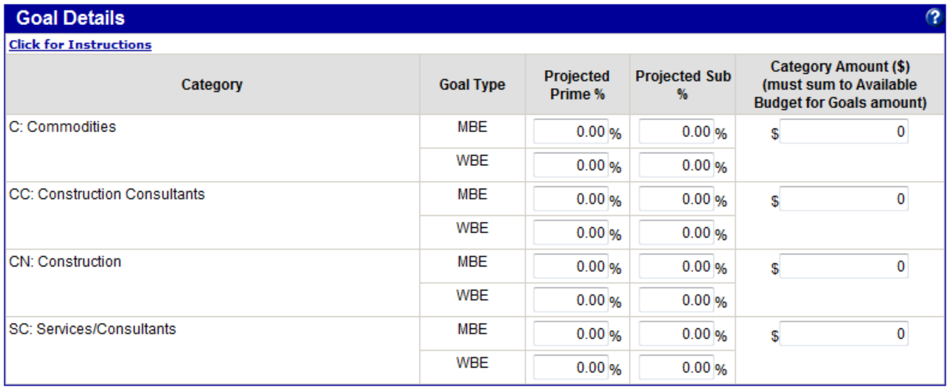
The submitting agency establishes goals for contracting with certified firms in the Commodities, Construction Consultants, Construction, and Services/Consultants industries. Goals must be based on the studies and regulations that govern the program.

You enter the certified goal percentages along with the total expenditures anticipated for each industry category. The total expenditures value is inclusive of spending with certification and non-certified firms. The sum of the category amounts must equal the Projected Total Agency Budget amount listed in the Budget Summary box.

To enter industry goal details

- In the **Goal Details** box, enter the percentages and amounts allocated to meet **MBE** and **WBE** goals in each industry, as follows:

  Projected Prime % –The percentage of spending the agency anticipates will go to prime contractors, not including any subcontracting activities.
  Projected Sub % – The percentage the spending the agency anticipates will go to subcontractors.
  Category Amount – The total amount the agency will spend with ALL prime and subcontractors, certified and non-certified.



Goal Details

Click for Instructions

Category	Goal Type	Projected Prime %	Projected Sub %	Category Amount ($) (must sum to Available Budget for Goals amount)
C: Commodities	MBE	0.00 %	0.00 %	$ 0
	WBE	0.00 %	0.00 %	
CC: Construction Consultants	MBE	0.00 %	0.00 %	$ 0
	WBE	0.00 %	0.00 %	
CN: Construction	MBE	0.00 %	0.00 %	$ 0
	WBE	0.00 %	0.00 %	
SC: Services/Consultants	MBE	0.00 %	0.00 %	$ 0
	WBE	0.00 %	0.00 %	

Adding supporting documents to goal plans

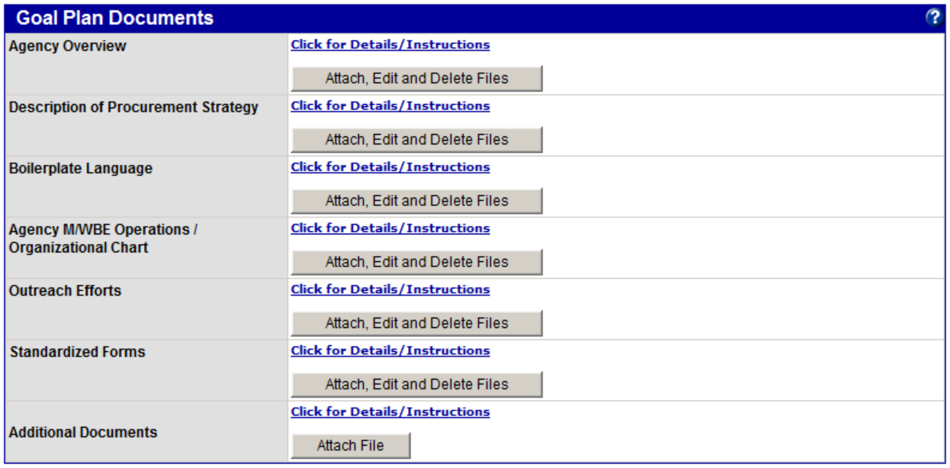
The submitting agency must add documents to support the goal plan in the following areas:

- **Agency Overview** – A one page description of the submitting agency and how the agency intends to procure services, goods, and materials.
- **Description of Procurement Strategy** – Provides a description of the agency's strategy for meeting certified goals for contracting with minority and/or women owned businesses, including overall objectives and benchmarks, any foreseen obstacles and how the agency plans to address those challenges, and successful strategies used in the past to increase participation with certified firms.
- **Boilerplate Language** – Provides a template the agency will use in solicitations and contracts, including information about goals to be assigned, penalties for failure to comply with the contract's conditions, and other language or references to include with solicitations and contracts.
- **Agency M/WBE Operations/Organizational Chart** – Includes the agency's organization chart, in relation to the program staff and their responsibilities in developing and administering certification goals. Items to address in full detail: Contracting or Procurement Unit's Responsibilities, Contract Compliance Unit's Responsibilities, Internal Reporting Mechanisms and Responsibilities.
- **Outreach Efforts** – Details innovative initiatives the agency will use to meet and increase certification goals. Also includes metrics for tracking efforts.

- **Standardized Forms** – Includes the agency's standard forms: Contractor's Utilization Form of All Subcontractors and Suppliers, Waiver Form, Notice of Acceptance or Deficiency of Utilization Form, Form Letters and Memos (internal and external), Construction Agencies.
- **Additional Documents** – Any additional documents used to support the goal plan.

To add supporting documents to a goal plan

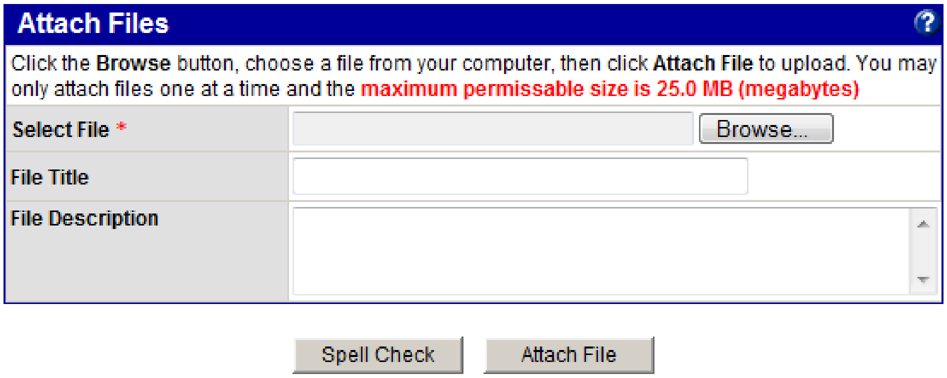
1. In the **Goal Plan Documents** area, click the **Attach, Edit and Delete Files** button for the document type you want to attach.



Goal Plan Documents

Agency Overview	Click for Details/Instructions Attach, Edit and Delete Files
Description of Procurement Strategy	Click for Details/Instructions Attach, Edit and Delete Files
Boilerplate Language	Click for Details/Instructions Attach, Edit and Delete Files
Agency M/WBE Operations / Organizational Chart	Click for Details/Instructions Attach, Edit and Delete Files
Outreach Efforts	Click for Details/Instructions Attach, Edit and Delete Files
Standardized Forms	Click for Details/Instructions Attach, Edit and Delete Files
Additional Documents	Click for Details/Instructions Attach File

2. In the **Select File** area, click the **Browse** button and locate and select the file.



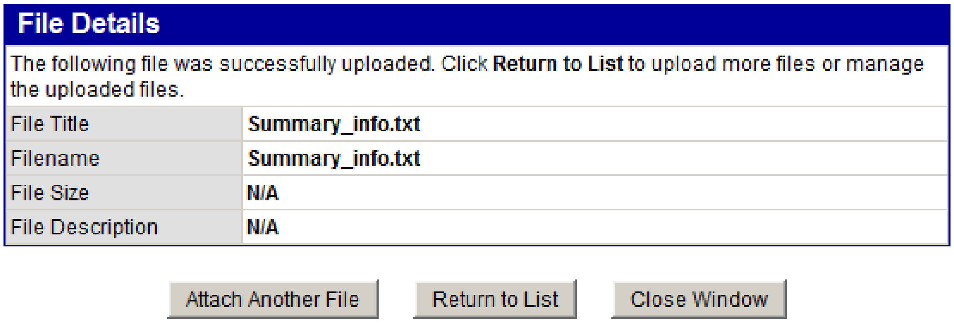
Attach Files

Click the **Browse** button, choose a file from your computer, then click **Attach File** to upload. You may only attach files one at a time and the **maximum permissable size is 25.0 MB (megabytes)**

Select File *	Browse...
File Title	
File Description	

3. In the **File Title** and **File Description** fields, enter the title and description of the file.

4. Click **Attach File**.
   To include an additional file, click **Attach Another File** and repeat the process.



File Details

The following file was successfully uploaded. Click **Return to List** to upload more files or manage the uploaded files.

File Title	**Summary_info.txt**
Filename	**Summary_info.txt**
File Size	**N/A**
File Description	**N/A**

5. To close the window, click **Close Window**.
6. Continue attaching files for each of the document types.
7. To save your work, click **Save Draft**, and then click **OK**.

TIP: To save your goal plan at any time, click **Save Draft** at the bottom of the page.

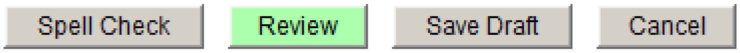
Reviewing and submitting goal plans

After completing all sections in the goal plan, you can review the complete document and then submit it for acceptance.

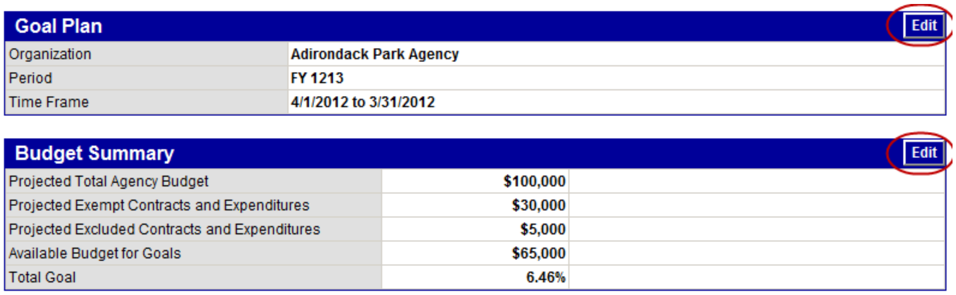
Submitted goal plans display a Pending Review status on the Goal Management: Goal Plan List page. You can View the plan, but you cannot make further updates unless you withdraw the report. If you need to make further changes, withdraw the report, make the changes, and then submit it again.

To review and submit a goal plan for acceptance

1. Open the goal plan you want to submit for acceptance.
   The Goal Management: Submit Goal Plan page displays.
2. At the bottom of the page, click **Review**.



3. To edit any information, click one of the **Edit** buttons.



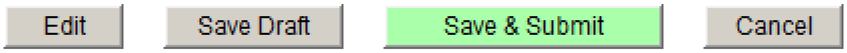
Goal Plan

Organization	**Adirondack Park Agency**
Period	**FY 1213**
Time Frame	**4/1/2012 to 3/31/2012**

Budget Summary

Projected Total Agency Budget	**$100,000**
Projected Exempt Contracts and Expenditures	**$30,000**
Projected Excluded Contracts and Expenditures	**$5,000**
Available Budget for Goals	**$65,000**
Total Goal	**6.46%**

4. Click **Save & Submit**.


Edit
Save Draft
Save & Submit
Cancel

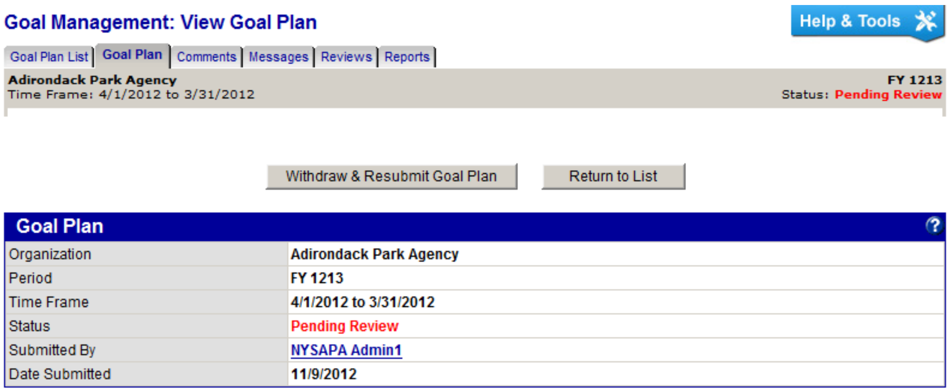
5. Click **OK** to confirm you want to submit the goal plan for acceptance.
   The goal plan will have a Pending Review status until the reviewing agency responds.

Withdrawing submitted goal plans

If you submitted a goal plan for review but need to withdraw it for any reason, you can remove it from the acceptance process.

To withdraw a goal plan

1. From the **View** menu, click **Goal Plans**.
2. On the **Goal Management: Goal Plan List** page, click the **View** hyperlink for the plan you want to withdraw.
3. Click the **Withdraw & Resubmit Goal Plan** button.


Goal Management: View Goal Plan
Help & Tools
Goal Plan List
Goal Plan
Comments
Messages
Reviews
Reports
Withdraw & Resubmit Goal Plan
Return to List
Goal Plan
?

Adirondack Park Agency
Time Frame: 4/1/2012 to 3/31/2012

FY 1213
Status: Pending Review

Goal Plan	
Organization	Adirondack Park Agency
Period	FY 1213
Time Frame	4/1/2012 to 3/31/2012
Status	Pending Review
Submitted By	NYSAPA Admin1
Date Submitted	11/9/2012

4. Click **OK** to confirm you want to withdraw the goal plan from the acceptance process.
5. Update the goal plan, as necessary.
6. To resubmit the goal plan, click the **Review** button, click **Save & Submit**, and then click **OK**.

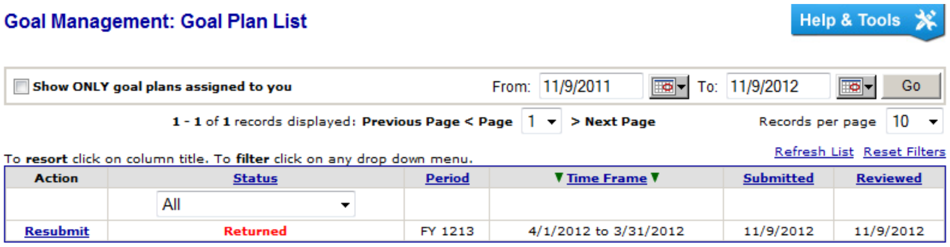
WARNING: Goal plans can only be withdrawn if they are pending review. Once accepted, they cannot be withdrawn.

Working with returned or withdrawn goal plans

If you withdrew a goal plan, or submitted a goal plan for acceptance and the approving agency returned it for further updates, you will be notified and the goal plan displays in your Goal Plan List with a Returned status (or Incomplete for withdrawn goal plans).

To view comments from the reviewing agency on a returned goal plan

1. From the **View** menu, click **Goal Plans**.
2. On the **Goal Management: Goal Plan List** page, click **Resubmit**.



Goal Management: Goal Plan List

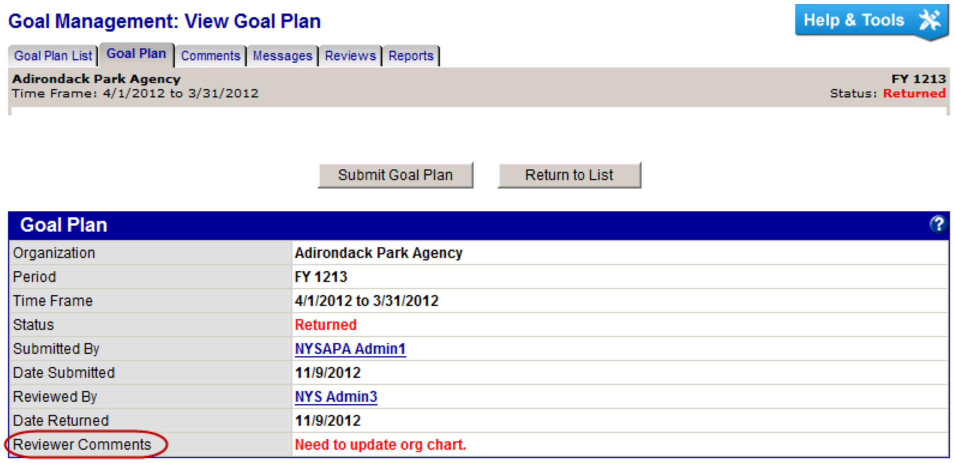
☐ Show ONLY goal plans assigned to you From: 11/9/2011 To: 11/9/2012

1 - 1 of 1 records displayed: Previous Page < Page 1 > Next Page Records per page 10

To resort click on column title. To filter click on any drop down menu.

Action	Status	Period	Time Frame	Submitted	Reviewed
	All				
Resubmit	Returned	FY 1213	4/1/2012 to 3/31/2012	11/9/2012	11/9/2012

3. View the comments in the Reviewer Comments field.



Goal Management: View Goal Plan

Adirondack Park Agency FY 1213
Time Frame: 4/1/2012 to 3/31/2012 Status: Returned

Goal Plan	
Organization	Adirondack Park Agency
Period	FY 1213
Time Frame	4/1/2012 to 3/31/2012
Status	Returned
Submitted By	NYSAPA Admin1
Date Submitted	11/9/2012
Reviewed By	NYS Admin3
Date Returned	11/9/2012
Reviewer Comments	Need to update org chart.

To update the goal plan and resubmit for review

1. Open the goal plan you want to resubmit for acceptance.
   The Goal Management: View Goal Plan page displays.
2. Click **Resubmit Goal Plan**.
3. Update the goal plan, as necessary.
4. To resubmit the goal plan, click the **Review** button, click **Save & Submit**, and then click **OK**.

Reviewing submitted goal plans

After the submitting agency completes a goal plan and submits it for acceptance, the reviewing agency must review the plan and either accept it or return it for further updates.

Once a goal plan is accepted, it cannot be updated by any agency. You can send the submitting agency an acceptance letter to notify the agency the goal plan was accepted.

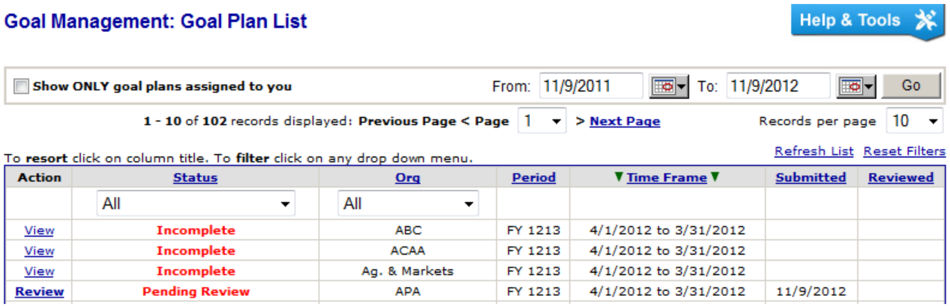
If you return the plan for further updates, you can include comments to explain what you need from the submitting agency. The submitting agency can update the goal plan and resubmit it for acceptance.

The Goal Plan List displays any plans currently assigned to you, including previously accepted plans and any plans that need your attention for review.

WARNING: This function is available only to the reviewing agency.

To access the Goal Plan List

1. From the **View** menu, click **Goal Plans**.
2. To show all plans for your agency, clear the **Show ONLY goal plans assigned to you** check box.



Goal Management: Goal Plan List

☐ Show ONLY goal plans assigned to you From: 11/9/2011 To: 11/9/2012

1 - 10 of 102 records displayed: Previous Page < Page 1 > Next Page Records per page 10

To resort click on column title. To filter click on any drop down menu.

Action	Status	Org	Period	▼ Time Frame ▼	Submitted	Reviewed
	All	All				
View	Incomplete	ABC	FY 1213	4/1/2012 to 3/31/2012		
View	Incomplete	ACAA	FY 1213	4/1/2012 to 3/31/2012		
View	Incomplete	Ag. & Markets	FY 1213	4/1/2012 to 3/31/2012		
Review	Pending Review	APA	FY 1213	4/1/2012 to 3/31/2012	11/9/2012	

3. To open a specific plan, in the **Action** column, click the **Review** hyperlink for the submitted plan you want to open.
4. To filter the list and view an older plan, change the **From** and/or **To** dates and click **Go**.
5. To return to the original view, click **Reset Filters** on the right.

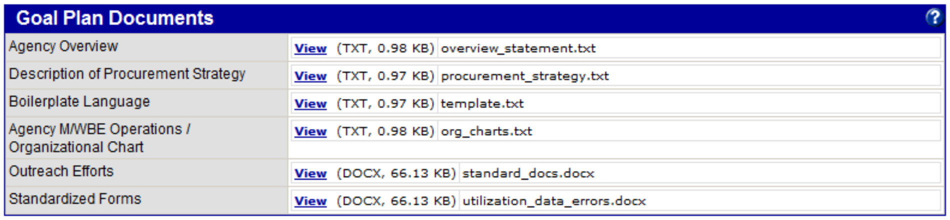
Accepting goal plans

When you review an agency's goal plan for acceptance, you review the information on the Goal Management: View Goal Plan page, including:

- **Goal Plan** – the submitting agency's name, the time frame for which the goal plan was written, and basic information.
- **Goal Summary** – the agency's available budget for goals and any excluded or exempt amounts.
- **Exemptions** – any exemptions that are subtracted from the agency's budget for meeting goal plans, such as utilities and intra-government expenditures. These exemptions can be carried over from year to year.
- **Exclusions** – any exclusions for expenditures made in areas where no certified firms exist to provide the goods and services. These are subtracted from the agency's budget for meeting goal plans.
- **Goal Details** - lists the goal percentages for the Commodities, Construction Consultants, Construction, and Services/Consultants industries.
- **Goal Plan Documents** – the documents that support the agency's goal plan.
- **Additional Information** – any additional comments the agency included in reference to the goal plan.

To accept a goal plan

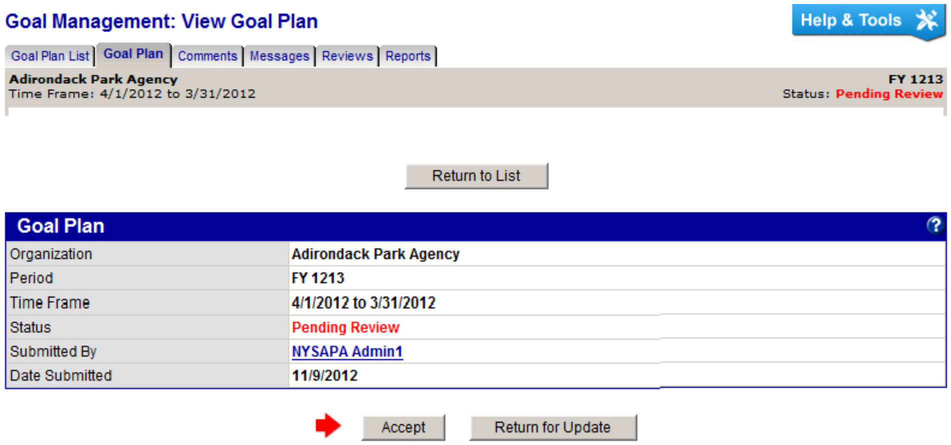
1. Open the goal plan you want to review.
   The Goal Management: View Goal Plan page displays.
2. Review the goal plan information.
3. To view the attached goal plan documents, click the **View** hyperlink for each document.



Goal Plan Documents

Agency Overview	View	(TXT, 0.98 KB)	overview_statement.txt
Description of Procurement Strategy	View	(TXT, 0.97 KB)	procurement_strategy.txt
Boilerplate Language	View	(TXT, 0.97 KB)	template.txt
Agency M/WBE Operations / Organizational Chart	View	(TXT, 0.98 KB)	org_charts.txt
Outreach Efforts	View	(DOCX, 66.13 KB)	standard_docs.docx
Standardized Forms	View	(DOCX, 66.13 KB)	utilization_data_errors.docx

4. To accept the goal plan, click the **Accept** button.
   Boxes for adding public and private comments display along with another Accept button.

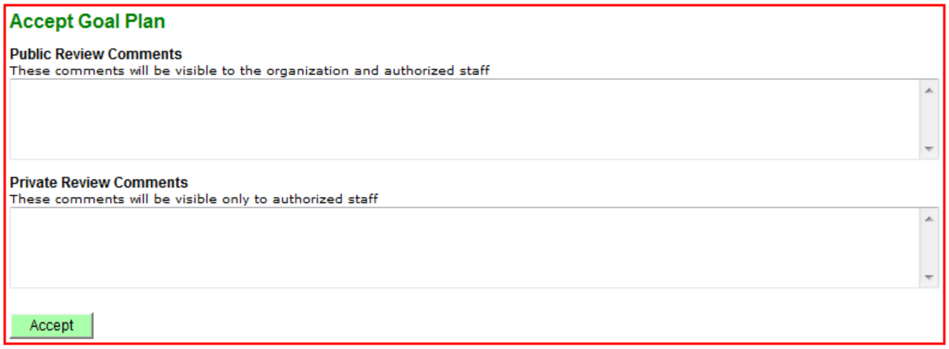


Goal Management: View Goal Plan

Adirondack Park Agency
Time Frame: 4/1/2012 to 3/31/2012
FY 1213
Status: Pending Review

Goal Plan	
Organization	Adirondack Park Agency
Period	FY 1213
Time Frame	4/1/2012 to 3/31/2012
Status	Pending Review
Submitted By	NYSAPA Admin1
Date Submitted	11/9/2012

5. To add optional comments accessible to the submitting and approving agencies, in the **Public Review Comments** box, enter additional comments. Public comments are not visible to any users outside of your agency and the submitting agency.
6. To add optional comments only visible to the approving agency, in the **Private Review Comments** box, enter additional comments.



Accept Goal Plan

Public Review Comments
These comments will be visible to the organization and authorized staff

Private Review Comments
These comments will be visible only to authorized staff

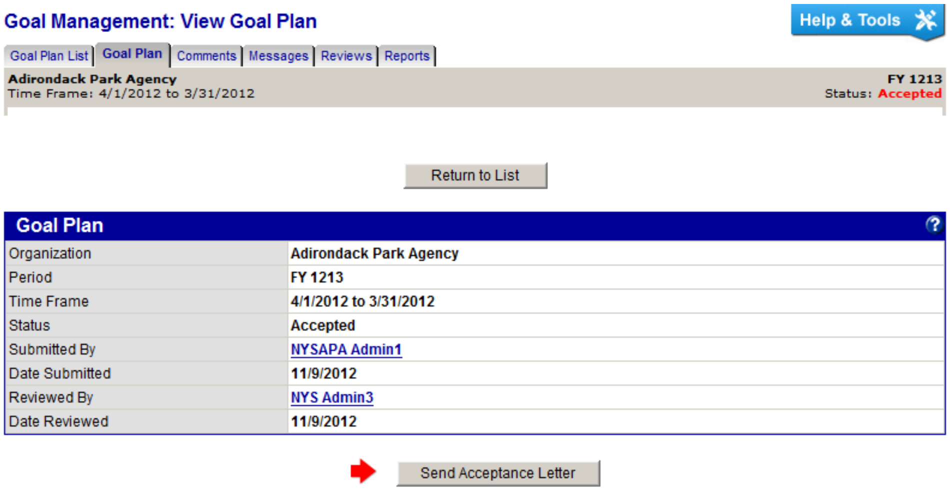
7. Click the **Accept** button.
8. Click **OK** to confirm you want to accept the goal plan.
   The Send Acceptance Letter button displays. For more information, see **Sending acceptance letters to submitting agencies**.

Sending acceptance letters to submitting agencies

After you accept a goal plan, you can notify the submitting agency of your action by sending the agency an acceptance letter. The letter is sent by email that includes a link to an official PDF letter file that remains in the system for view tracking. The email comes from a single Letter Sender and goes to one or more Letter Recipients.

To send an acceptance letter

1. Open the goal plan for which you want to send a letter.
   The Goal Management: View Goal Plan page displays.
2. Click the **Send Acceptance Letter** button.

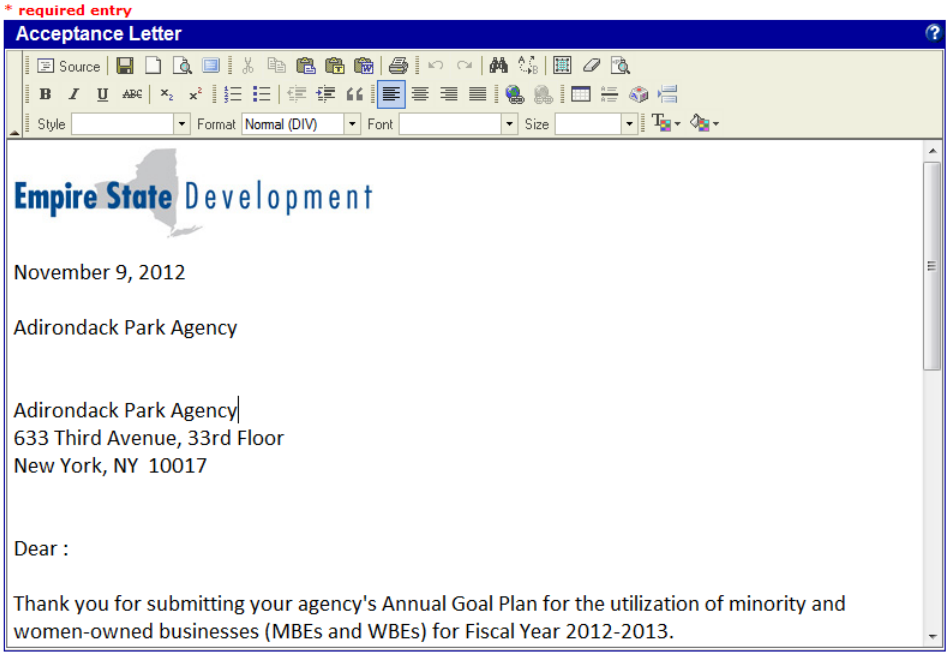

Goal Management: View Goal Plan
Help & Tools
Goal Plan List
Goal Plan
Comments
Messages
Reviews
Reports
Return to List
Send Acceptance Letter

Adirondack Park Agency
Time Frame: 4/1/2012 to 3/31/2012
FY 1213
Status: Accepted

Goal Plan

Organization	Adirondack Park Agency
Period	FY 1213
Time Frame	4/1/2012 to 3/31/2012
Status	Accepted
Submitted By	NYSAPA Admin1
Date Submitted	11/9/2012
Reviewed By	NYS Admin3
Date Reviewed	11/9/2012

3. In the **Acceptance Letter** box, view a draft of the letter. Edit the letter as needed.


* required entry
Acceptance Letter
Source
Style
Format
Normal (DIV)
Font
Size
Empire State Development

November 9, 2012

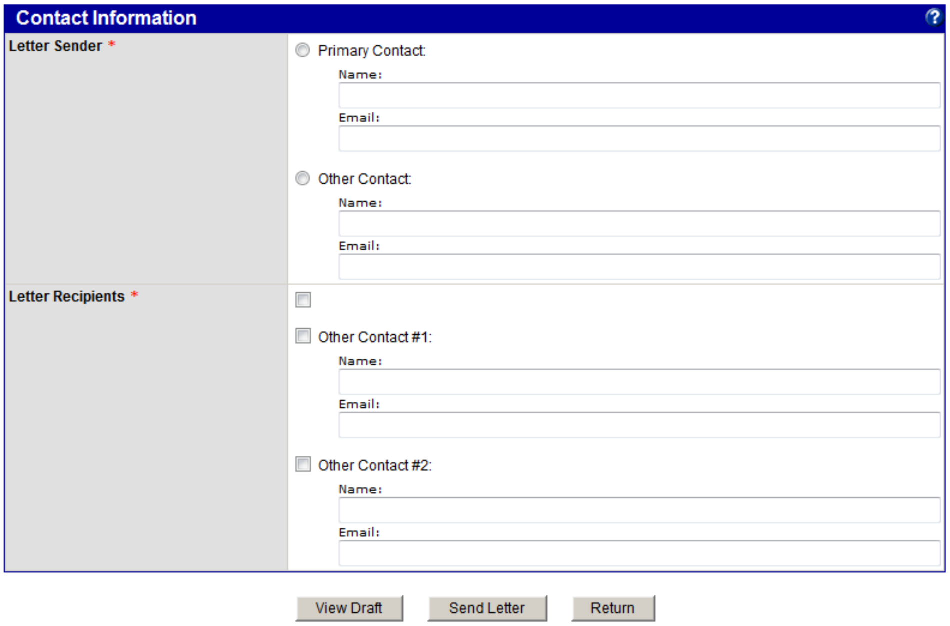
Adirondack Park Agency

Adirondack Park Agency
633 Third Avenue, 33rd Floor
New York, NY 10017

Dear :

Thank you for submitting your agency's Annual Goal Plan for the utilization of minority and women-owned businesses (MBEs and WBEs) for Fiscal Year 2012-2013.

4. In the **Letter Sender** area, select **Primary Contact**, **Secondary Contact**, or **Other Contact**. The contact information will be auto-filled based on the system configuration for the reviewing organization. The Letter Sender is the name and email that will appear in the email **From** field. Select **Other Contact** and enter **Name** and **Email** to use a different sender contact.



5. In the **Letter Recipients** area, select any combination of **Primary Contact**, **Secondary Contact**, **Other Contact #1**, and **Other Contact #2**. The **Primary Contact**, **Secondary Contact**, and **Other Contact #1** contact information will be auto-filled based on the system configuration for the submitting organization. Select **Other Contact #2** and enter **Name** and **Email** to include an additional recipient for the letter.
6. To view an exact copy of the letter that will be generated, click **View Draft**.
7. To send the letter to the selected recipient contacts, click **Send Letter**.
8. Click **OK** to confirm you want to send the letter.

Returning goal plans

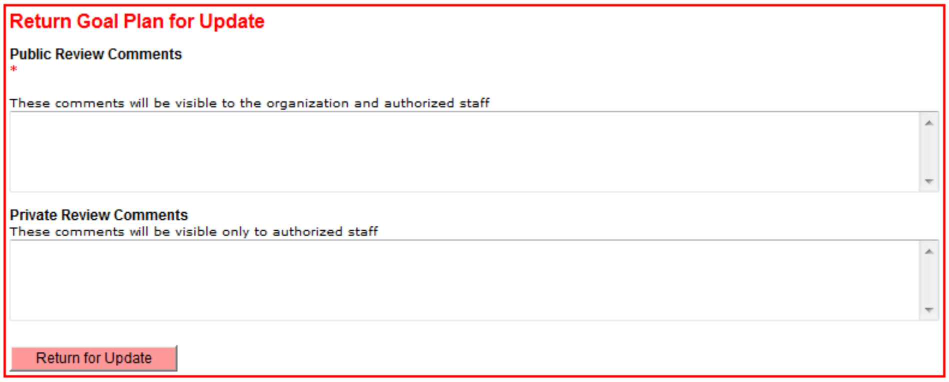
If, after reviewing the goal plan, you determine it is not ready to be accepted, you can return it to the submitting agency for update. You cannot make updates to the goal plan. When the goal plan is returned to the submitting agency, you can include specific reasons in the comments area. The submitting agency will address the issues and resubmit the goal plan.

To return a goal plan

1. Open the goal plan you want to return that is Pending Review.
   The Goal Management: View Goal Plan page displays.
2. To return the goal plan, click the **Return for Update** button.
3. To add required comments accessible to the submitting and approving agencies, in the **Public Review Comments** box, enter the reason you are returning the report. Public

comments are not visible to any users outside of your agency and the submitting agency.

4. To add optional comments only visible to the approving agency, in the **Private Review Comments** box, enter comments about returning the plan.



Return Goal Plan for Update

Public Review Comments
*
These comments will be visible to the organization and authorized staff

Private Review Comments
These comments will be visible only to authorized staff

5. Click **Return for Update**.
6. Click **OK** to confirm you want to return the plan.

The goal plan reflects the Returned status but still displays in the Goal Plan List.

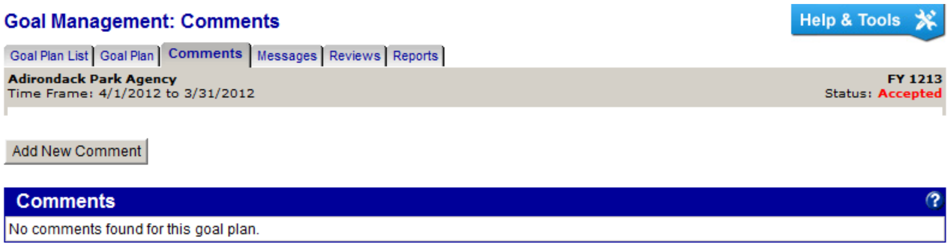
Working with goal plan comments and messages

Adding comments

Comments can be added to a goal plan to make notes, set up alerts, and trigger reminders. Any comments associated with a specific goal plan display in a list on the Comments tab. You can add comments, edit or delete existing comments, and, if a comment was assigned a due date, view and save it to your calendar.

To add a comment to a goal plan

1. If necessary, open the goal plan to which you want to add a comment.
2. Go to the **Comments** tab.



Goal Management: Comments

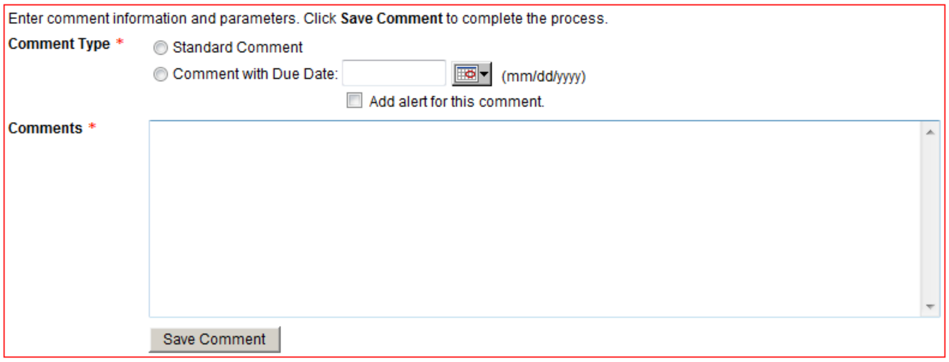
Help & Tools
Goal Plan List | Goal Plan | Comments | Messages | Reviews | Reports

Adirondack Park Agency
Time Frame: 4/1/2012 to 3/31/2012
FY 1213
Status: Accepted

Comments
No comments found for this goal plan.

3. Click **Add New Comment**.

4. In the **Comment Type** area, specify whether you want to add a **Standard Comment** or **Comment with Due Date**.



Enter comment information and parameters. Click **Save Comment** to complete the process.

Comment Type *
○ Standard Comment
○ Comment with Due Date: (mm/dd/yyyy)
☐ Add alert for this comment.

Comments *

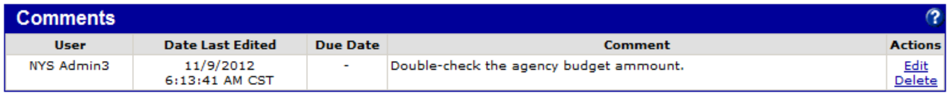
5. If necessary, from the calendar selector, select the due date.
6. To create an alert for a **Comment with Due Date**, select **Add an alert for this comment**.
7. In the **Comments** area, enter your comment.
8. Click **Save Comment**.

Comments display in the list.

TIP: Comments that are created as an alert will be triggered on the selected Due Date and an email alert sent to you. The alert will also be shown on your dashboard.

To edit or delete a comment

1. To edit a comment, click the **Edit** hyperlink for the comment you want to update, edit the comment, click **Review**, and then click **Save**.



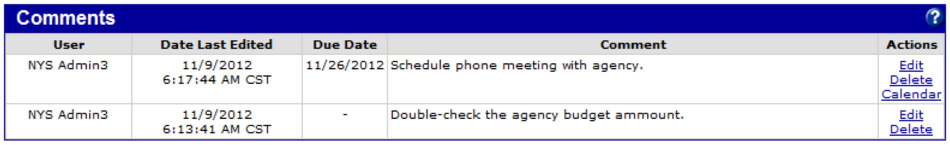
Comments

User	Date Last Edited	Due Date	Comment	Actions
NYS Admin3	11/9/2012 6:13:41 AM CST	-	Double-check the agency budget ammount.	Edit Delete

2. To delete a comment, click the **Delete** hyperlink for the comment you want to delete, and then click **OK**.

To view and save a comment to your calendar

1. If a comment has an associated Due Date, to add it to your calendar, click the **Calendar** hyperlink.



Comments

User	Date Last Edited	Due Date	Comment	Actions
NYS Admin3	11/9/2012 6:17:44 AM CST	11/26/2012	Schedule phone meeting with agency.	Edit Delete Calendar
NYS Admin3	11/9/2012 6:13:41 AM CST	-	Double-check the agency budget ammount.	Edit Delete

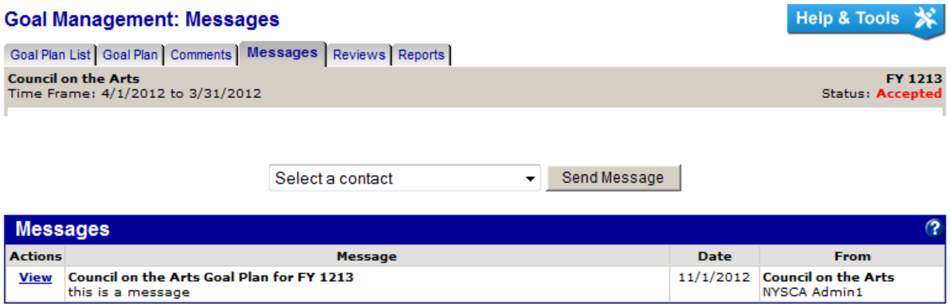
2. Click **OK** to confirm you want to open and save it in your calendar.
3. Save the comment using your calendar's tools, which vary depending on the calendar software you use (e.g. Microsoft Outlook).

Sending messages

When the system is used to send messages to other users, the goal plan stores a complete history of communications for future reference. Any message sent or received through the system about a goal plan is saved with the record and can be viewed at any time. For example, if the submitting user needs to send a colleague a message relating to the goal plan, the agency can send the message through the Messages tab.

To send a message from a goal plan

1. Open the goal plan from which you want to send a message.
2. Go to the **Messages** tab.



Goal Management: Messages

Council on the Arts
Time Frame: 4/1/2012 to 3/31/2012

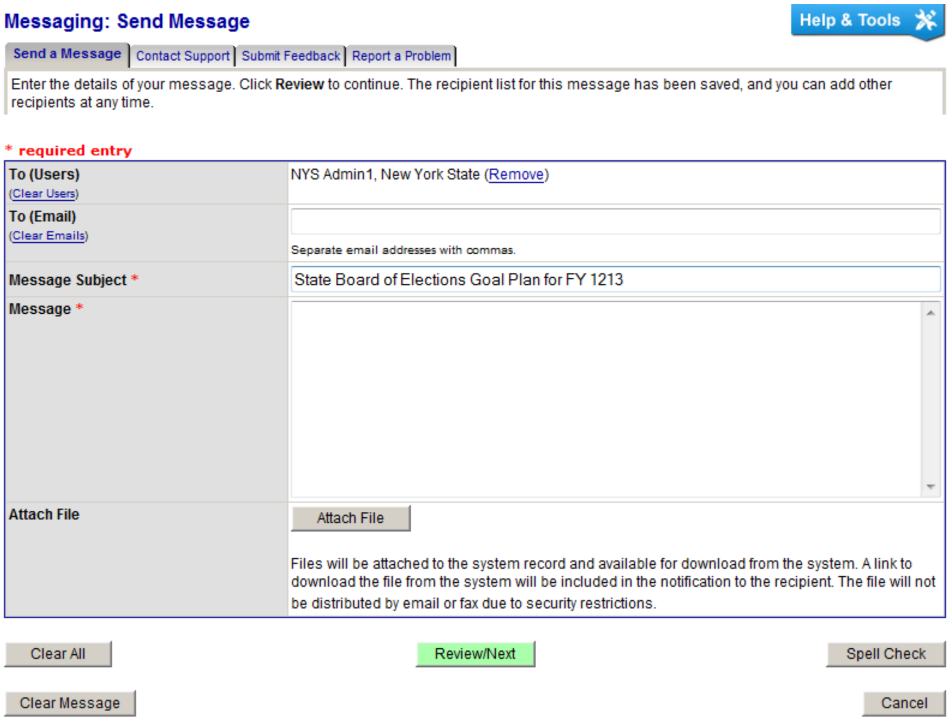
FY 1213
Status: Accepted

Messages

Actions	Message	Date	From
View	**Council on the Arts Goal Plan for FY 1213** this is a message	11/1/2012	**Council on the Arts** NYSCA Admin1

Help & Tools
Goal Plan List
Goal Plan
Comments
Messages
Reviews
Reports
Select a contact
Send Message
?

3. From the **Select a contact** list, select the contact to which you want to send a message, and then click **Send Message**.
   The Messaging: Send Message page displays.
4. In the **Message** field, enter the message, and then click **Review/Next**.



Messaging: Send Message

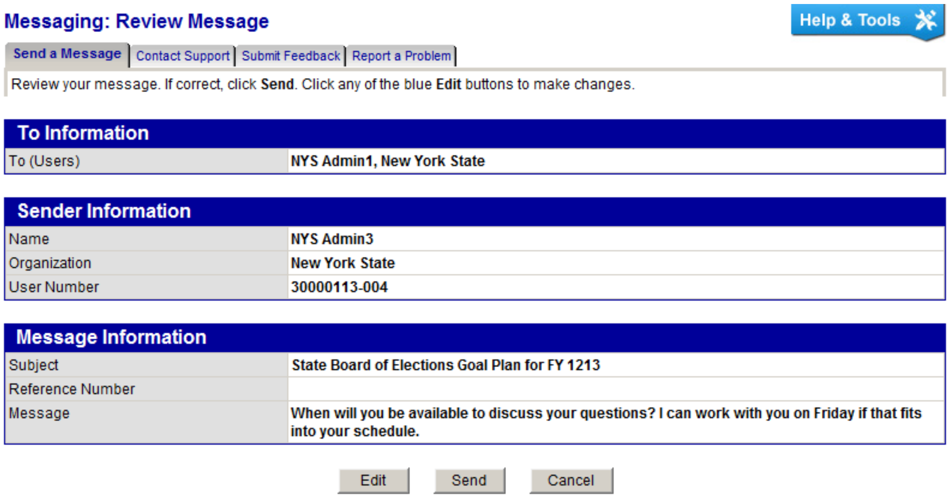
Enter the details of your message. Click **Review** to continue. The recipient list for this message has been saved, and you can add other recipients at any time.

* required entry

To (Users) (Clear Users)	NYS Admin1, New York State (Remove)
To (Email) (Clear Emails)	Separate email addresses with commas.
Message Subject *	State Board of Elections Goal Plan for FY 1213
Message *	
Attach File	Attach File Files will be attached to the system record and available for download from the system. A link to download the file from the system will be included in the notification to the recipient. The file will not be distributed by email or fax due to security restrictions.

Help & Tools
Send a Message
Contact Support
Submit Feedback
Report a Problem
Clear All
Review/Next
Spell Check
Clear Message
Cancel

5. Click **Send**.


Help & Tools
Send a Message
Contact Support
Submit Feedback
Report a Problem
Edit
Send
Cancel

Messaging: Review Message

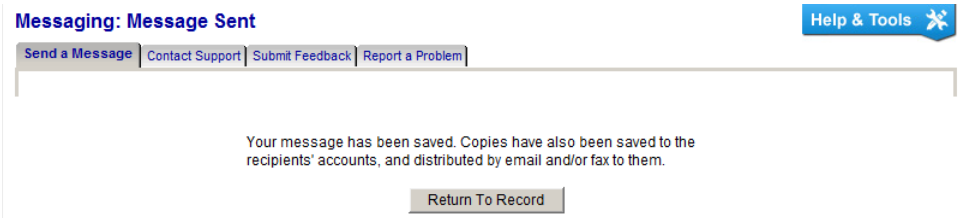
Review your message. If correct, click **Send**. Click any of the blue **Edit** buttons to make changes.

To Information	
To (Users)	**NYS Admin1, New York State**

Sender Information	
Name	**NYS Admin3**
Organization	**New York State**
User Number	**30000113-004**

Message Information	
Subject	**State Board of Elections Goal Plan for FY 1213**
Reference Number	
Message	**When will you be available to discuss your questions? I can work with you on Friday if that fits into your schedule.**

6. To return to the **Messages** tab for the goal plan, click **Return to Record**.


Help & Tools
Send a Message
Contact Support
Submit Feedback
Report a Problem
Return To Record

Messaging: Message Sent

Your message has been saved. Copies have also been saved to the recipients' accounts, and distributed by email and/or fax to them.

WARNING: Sent messages cannot be deleted or recalled.
