**FirstPic Portal 2020 Self-Assessment Step-by-Step Instructions**

**Welcome to the Annual Self-Assessment Process**

1. Your CEO/ED/Program Director will use the same login information received last year to login to the site. If you do not remember your login, please go to [**https://firstpic.force.com/bbbs/login**](https://firstpic.force.com/bbbs/login)and click on ‘Forgot Your Password’ to reset your password. If you are a **NEW** CEO/ED/Program Director and have never received a login, please email your login request to [support@firstpic.org](mailto:support@firstpic.org).
2. Log in to the site and click on the “Organization Info” tab at the top.
3. You **do not** need to enter your EIN, D.U.N.S number, address, phone number, or website info at the top of the page.
4. Under “Associated Contacts” – Please verify/update all information entered for the required 6 staff contacts:

**CEO**

**Board Chair**

**Program Lead**

**Finance Lead**

**Fund Development Lead**

**Marketing/Recruitment Lead**

The site will **not** allow you to move forward until this information is updated and verified. Please review the list of contacts for accuracy and make edits where applicable. If one person at your agency fills more than one of these roles, enter that person’s name under each role. The site will not allow the same email address to be entered under multiple roles, so as a workaround, please enter their email address under their primary role, and fake emails for the additional roles, using **your organization’s actual domain** so that it is a unique email.

For example, if your domain is “@bbbsofABCcounty.org”:

|  |  |  |  |
| --- | --- | --- | --- |
| **First Name** | **Last Name** | **Role** | **Email** |
| John | Doe | CEO | [johndoe@bbbsofABCcounty.org](mailto:johndoe@bbbsofABCcounty.org) |
| John | Doe | Finance Lead | [sample1@bbbsofABCcounty.org](mailto:sample1@bbbsofABCcounty.org) |
| John | Doe | Fund Development Lead | [sample2@bbbsofABCcounty.org](mailto:sample2@bbbsofABCcounty.org) |

1. Under “Users” – Please verify all active users listed and deactivate any old user accounts for your agency.
2. Click on the edit button for the 2020 Current Self-Assessment. You should see the “edit” button to the far right.
3. **By February 1** – Login to your Self-Assessment via the FirstPic portal and complete the 2021 Network Growth Goals & Innovative Programs document. *You do not need to mail, fax, or email the form to BBBSA.*
4. Go to the Additional Requirements tab.
5. Open the *Network Growth Goals & Innovative Program* document in Excel, located under the Templates section at the bottom of the Additional Requirements tab.
6. Complete the *2021 Growth Goals* sheet by entering the appropriate data into each of the yellow fields.
7. If your agency has any Non 1:1 Programs, also complete the *Innovative & Other Programs* sheet by entering the appropriate data into each of the yellow fields and making selections for the *Select If Applicable* cells.
8. Save the entire workbook to your computer as a PDF. Within your saving options you will want to select “entire workbook” rather than “active sheet” – this will allow you to save both sheets as one PDF file. If preferred and/or easier, you may save each sheet as individual files and upload two files for this line item into the portal.
9. Click on the edit pencil icon for Network Growth Goals & Innovative Programs under the Attachments.
10. Click on Choose File to locate PDF document.
11. Click on Upload and then click Close.
12. Confirm both sheets of the workbook were uploaded into the portal via the upload(s) provided.

*If you accidentally upload the wrong document as an attachment, you can delete it by clicking on the X in the circle next to the attachment.*

1. **By February 28** – Login to your Self-Assessment via the FirstPic portal and complete the below outlined items. *You do not need to mail, fax, or email these forms to BBBSA.*
2. **ASSESSMENT;** Answer each line of the Standards of Practice requirements as “In” or “Out” of compliance. Remember to save progress before leaving the review.
   1. For any items marked “Out” of compliance, the site will require that you enter an explanation in the text box on the right-hand side of the page. Your text should explain:
      1. Why your agency is not currently in compliance with the standard.
      2. A date of when the standard will be in compliance. Date must be within 60 days of the Self-Assessment due date, February 28, 2021.
   2. Three Standards require an uploaded document. You should see an option to upload at the end of the specific Standard as you go through the assessment. Click on Upload button, click Choose File to locate PDF document, click Upload and then click Close. These include your updated:
      1. Board Development Plan (Standard 2E)
      2. Strategic and Annual Plan (Standard 3)
      3. Program Manual (Standard 12)
3. **PROOF OF INSURANCE;** Located on the Additional Requirements tab.
4. If your agency is insured through John Kirby (Great American) we only need your expiration date. You do not need to upload proof of insurance.
5. If your agency is insured through another company, enter or edit the company name (the insurance carrier; not the broker or the agent), enter the expiration date, and upload a PDF copy of your declaration page showing coverage limits and expiration date by clicking on Upload Proof of Insurance.
6. **UPLOAD 2020 AUDIT;** Located on the Additional Requirements tab.
   1. Enter your agency’s fiscal year end date that occurred during 2020.
      1. Please Note: Your audit must be uploaded to the site within 9 months from the fiscal year end date.
   2. If your audit is already complete – click on Upload 2020 Audit, click on Choose File to locate PDF document, Upload and then Close.
7. **AFFILIATION FEE FORM;** Located on the Additional Requirements tab. Click on Affiliation Fee Form Template, located under the Templates section at the bottom of the Additional Requirements tab.
8. Open in Excel.
9. Complete the form on your computer and select a payment option at the bottom. (Payments must be postmarked by 2/28 to take advantage of the 5% discount.)
10. Save the form to your computer as a PDF.
11. Click on the edit pencil icon for Affiliation Fee Form.
12. Click on Choose File to locate PDF document.
13. Click on Upload and then click Close.
14. **TECHNOLOGY LICENSES FORM;** Located on the Additional Requirements tab. The fee has already been calculated for each agency based on the number of current active users.
15. Open the Technology Licenses Form document in PDF located under the Attachments section.
16. Print the form.
17. Select a payment option and scan the form as a PDF.
18. Click on the edit pencil icon for Technology Licenses Form.
19. Click on Choose File to locate PDF document.
20. Click on Upload and then click Close.
21. **INCOME STATEMENT**; Located on the Additional Requirements tab. Click on the edit pencil icon, for Income Statement.
    1. Click on Choose File to locate PDF document.
    2. Click on Upload and then click Close.
22. **SUPPORTING DOCUMENTATION FOR AFFILIATION FEE FORM**; Located on the Additional Requirements tab. Click on the edit pencil icon for Supporting Documentation, as Applicable for Lines C-F of the Affiliation Fee Form.
23. Click on Choose File to locate PDF document(s).
    1. *If submitting documents for more than one line, scan documents together to create one PDF file.*
24. Click on Upload and then click Close.
25. **ORGANIZATIONAL CHART;** Located on the Additional Requirements tab. Click on the edit pencil icon for Organizational Chart.
    1. Click on Choose File to locate PDF document.
    2. Click on Upload and then click Close.
26. **VERIFICATION LETTER;** Located on the Additional Requirements tab. Click on Verification Letter Template, located under the Templates section at the bottom of the Additional Requirements tab.
    1. Complete the Letter, Print and have CEO/ED and Board Chair sign it. This needs to be uploaded with both signatures by February 28th. Be sure to make necessary arrangements to obtain Board Chair’s signature prior to the deadline.
    2. Scan letter and save to your computer as a PDF.
    3. Click on the edit pencil icon for Verification Letter.
    4. Click on Choose File to locate PDF document.
    5. Click on Upload and then click Close.

*If you accidentally upload the wrong document for any of the attachments, you can delete it by clicking on the X in the circle next to the attachment.*

1. Once all of the above required items and steps have been completed, click “Submit” to submit your Assessment. You will see on the Organization Info tab that your Assessment has been Submitted.

**WHO TO CONTACT?**

If you have questions about the FirstPic website, login issues, or other technical concerns, please contact FirstPic Support at [support@firstpic.org](mailto:support@firstpic.org).

If you have questions about the Self-Assessment process or requirements, please contact Agency Support at [affiliatesupport@bbbsa.org](mailto:affiliatesupport@bbbsa.org).

If you have questions specific to the *Affiliation Fee Form*, *Technology Licenses Form*, *Income Statement* or *Supporting Documentation for Affiliation Fee Form*, please contact Accounting at [accounting@bbbsa.org](mailto:accounting@bbbsa.org).