

Updating InfoNet Funding for Staff (FFS) Information

Before updating InfoNet's Funding for Staff (FFS), you should have the following information with you for EACH grant funded staff member you intend to add or update:

- 1) Name of grant funded staff person(s) to be updated:

Example: Julia Dean

- 2) How each staff person is now paid – more specifically, list each grant that supports this staff person's salary, and percentage of that person's salary that each grant will pay. Dollar amounts are not necessary.

Example: Julia Dean's salary is paid with three grants: 1) The Attorney General's VCVA grant pays for 50% of Julia's salary; 2) 25% is paid with VAWA Prevention; 3) and the remaining 25% is paid with DHS funds.

- 3) For each grant, list what services the grant WILL or WILL NOT pay for (whatever is simpler)

Example: AG-VCVA grant does NOT pay for any community or institutional services, VAWA Prevention funds can ONLY be used for Public Education services, and DHS funds can be used for any activity.

- 4) Estimates of how the staff person generally spends their time with regard to service provision. This is important information most often overlooked when working with Funding For Staff. This includes not only time spent actually providing services, but other time spent in support of these services, e.g. preparation, meetings, reviewing client cases, etc. This may be difficult as each day can look completely different than the next, but think about how this person generally spends their work time over the long term. How does this person generally spend their time over 6-12 months? These can be changed if you later learn that these estimates were way off, so just try to estimate as best you can.

Example: Julia spends about 70% of her time providing counseling and advocacy services to victims and their loved ones (including supportive tasks necessary to provide these services), while the other 30% of her time is spent preparing for, arranging, and delivering presentations about sexual assault prevention (Public Education).

- 5) First date(s) for which the above information becomes effective

Example: Julia Dean was hired according to the above specifications on July 1, 2009.

Once you have all five of these facts for each staff member, you are ready to update your FFS Statement so that your grant-specific information generated from InfoNet will be as accurate as possible. Now, let's update an FFS Statement for FY10 using the examples just described.

STEP 1: ADD A NEW FUNDING STATEMENT DATE.

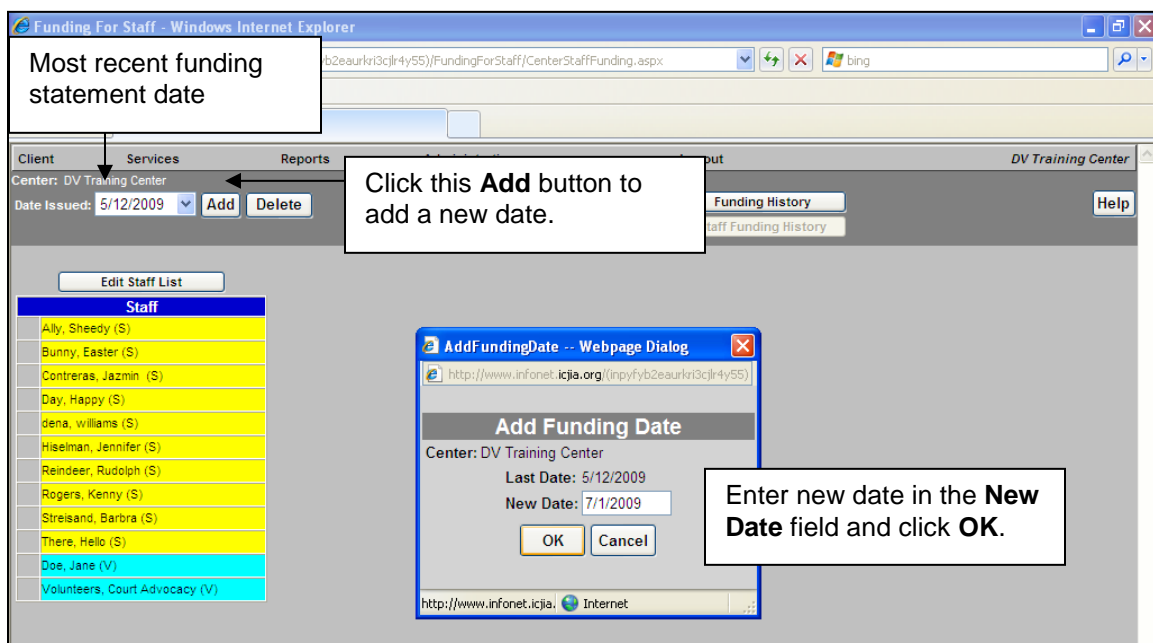
This step is most important. You must add a new funding statement whenever a change occurs with any of the following: 1) staff; 2) how staff salary is paid; or 3) shift in staff responsibilities. Additionally, you should add a new funding statement date every July 1st even if none of these changes occurred. Adding a new funding statement date each July 1st ensures you will always have a “clean” fiscal year of information, even if you later recognize updates should have been made but were overlooked.

Adding a new funding statement date:

- 1) Log in to InfoNet as the center (or satellite) from which the staff works.
- 2) Click **Administration → Funding For Staff** from the top navigation menu. You will see a screen similar to that shown in Figure 1 below.
- 3) Click the **Add** button in the top left corner.
- 4) A new window appears to add a new funding date. Enter the date updated funding information became effective and click **OK**. Note that InfoNet will not allow you to enter future dates, so new funding dates must be added on or after the effective date of change.

This step is now complete. All funding information from the previous date (5/12/09 in the example below) is carried forward to the new date you are adding. The next step is to update all information that has become effective on the new funding date.

Figure 1



STEP 2: UPDATE STAFF LIST

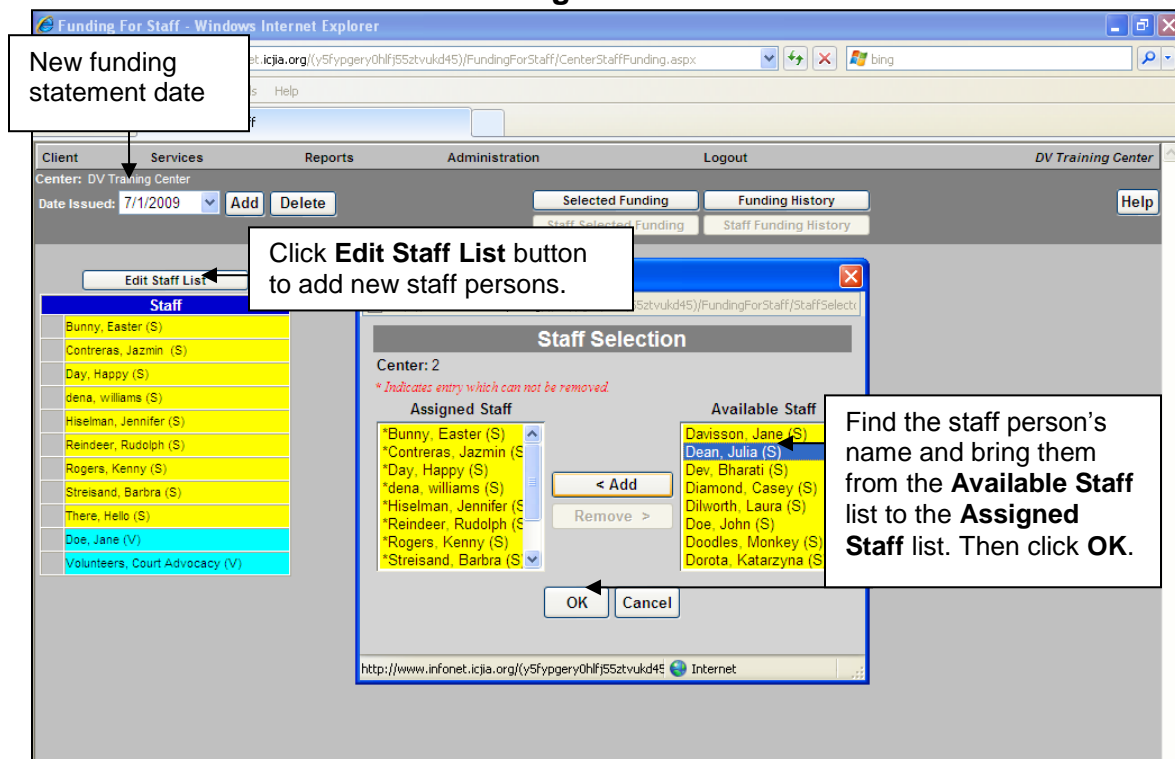
Now that you have a new funding statement date, you want to make sure all the grant funded staff names are listed on the statement. Review the staff list on the left side. If staff were grant funded prior to the new date added, you should already see their name on this list. You may need to add new staff (or staff who are newly grant funded) to the statement. You may also want to remove staff that have resigned or are no longer grant funded.

Note that not all staff names need to be included in your funding statement. Staff supported wholly or in part with grant funds deriving from a funder that requires grant specific data must be included. Beyond this, providers have the option of including additional staff if there is internal interest in tracking impacts of certain funding streams.

Updating the FFS Staff List:

- 1) Click the **Edit Staff List** button.
- 2) A new window will appear with an **Assigned Staff** list on the left side (staff names currently on funding statement), and an **Available Staff** list (all center staff) on the right side. Find the staff person you want to add from the **Available Staff** list as shown in Figure 2, click to highlight their name, then click the **Add** button pointing to the left. If you need to select more than one staff name, press the **Ctrl** key as you select multiple names.
- 3) Click **OK**. This will bring the selected name(s) into the new funding statement.

Figure 2



You may also remove staff names from the new funding statement if they no longer work for the organization or are grant funded. However, if a new staff being added is replacing one of these former staff, don't remove their name just yet. The former staff's funding information can be used as a shortcut to link service and funding information to the new staff. See the FAQ section near the end of this document for more details about this shortcut.

Frequently Asked Question: *What if I don't see the staff's name on the Available or Assigned Staff Lists?*

Go to the **Staff Information** page in InfoNet (**Administration → Staff Information → Paid Staff or Volunteer**) and check three things:

- 1) Is the staff person's name entered as a paid staff or volunteer? If not, add them and try again.
- 2) Is the staff's **Start Date** AFTER the funding statement date? If so, you need to either add another funding date that is equal to or later than their start date OR edit the staff's **Start Date** to be equal to or earlier than the funding statement date.
- 3) Does this staff record have a **Termination Date** that is EARLIER than the funding statement date? If so, this date should be removed if this staff person is still active as of your new funding statement date. Simply remove the Termination Date and click **Save**.

STEP 3: LINK STAFF TO SERVICES THEY PROVIDE AS OF THE NEW FUNDING STATEMENT DATE.

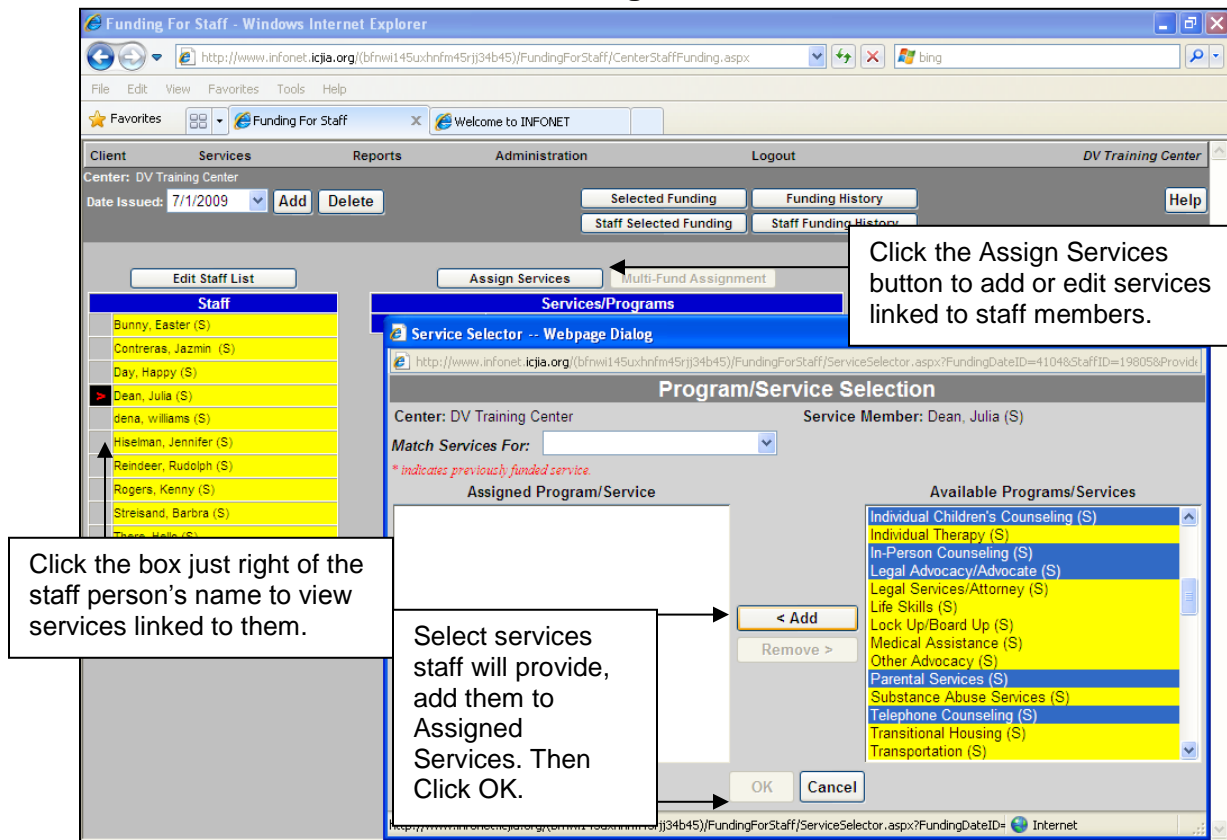
Now that you've updated your funding statement with staff names, you need to make sure each staff member's services are linked to their name.

Linking staff to funded services:

- 1) As shown in Figure 3, click the box just right of a staff name on the **Staff** list.
- 2) A second column will appear displaying a list of **Services/Programs**. If this is a staff person who was also in the prior funding statement, you should see a list of services that person provides. Review this list and make sure all the services this person now provides are included. You may need to add or remove some services for this person if anything has changed on the new funding date. If the staff person is new, you won't see any services listed in this column. To edit or add services to a staff's name, click the **Assign Services** button as shown in Figure 3. A new window will open with a list of **Assigned Services** on the left and **Available Services** on the right (also shown in Figure 3). Highlight all services this staff person will provide beginning on the funding statement date by clicking services from the **Available Services** list. If you press and hold the **Ctrl** key, you may select multiple services at once. You want to include ALL possible services this person will provide, even if they may only provide them occasionally or rarely as long the service is allowable given their salary funding sources. After

selecting all possible services this person will provide, click the **Add** button to bring them over to the **Assigned Services** list. Finally, click **OK**. If any services need to be removed, follow the same process by selecting services from the **Assigned Services** list, then click the **Remove** button and **OK**.

Figure 3



STEP 4: DETERMINE FUNDING SOURCE PERCENTAGES FOR HOW EACH SERVICE WILL BE PAID.

Determining what percentage of service each grant or funding source will pay for is probably the most challenging task required for completing your FFS statement. The most common oversight of users is failing to consider how a staff person generally spends their work time when determining these percentages. This is important information and will go a long way toward ensuring reports generated in InfoNet will most closely reflect grant funded activities.

Figure 4 on the following page displays a new FFS statement where a new staff person, Julia Dean, has just been added. Services have also been assigned to her name as shown in the **Services/Programs** column. However, no funding sources have been assigned to these services. This is why all Julia's services have zeroes in their percent (%) columns, and that no information is displayed in the **Funding Source** column on the right side of the screen. Funding sources

must be added for each service so that InfoNet will know which grants pay for time spent providing each service. Since staff salaries are often supported with multiple funding sources, and each funding source typically has different restrictions, this can make working with FFS a hair-raising task! However, if you have all the information listed on Page 1 at hand and you use the FFS Formula shortly to follow, this task should become much simpler. Further, your funders will be so impressed that you can provide such accurate and rich information about services provided with their funds.

Figure 4

Staff	Services/Programs	Funding Source	%
Bunny, Easter (S)	In-Person Counseling (S)		0
Contreras, Jazmin (S)	Legal Advocacy/Advocate (S)		0
Day, Happy (S)	Other Advocacy (S)		0
Dean, Julia (S)	Telephone Counseling (S)		0
dena, Williams (S)	Public Education: Youth Organization (P)		0
Hiselman, Jennifer (S)	School: High School (P)		0
Reindeer, Rudolph (S)	School: Junior High (P)		0
Rogers, Kenny (S)			
Streisand, Barbara (S)			
There, Hello (S)			
Doe, Jane (V)			
Volunteers, Court Advocacy (V)			

In preparing to use the FFS Formula, first list the staff person's salary funding sources and what portion of their salary is paid with each source. Also identify any restrictions for each funding source, or what services can or cannot be provided with each grant as shown in the example below.

Julia Dean's Salary

50% Attorney General's VCVA – must only be used for direct services to victims and significant others;

25% VAWA Prevention – must only be used for prevention work (public education/school); and

25% DHS – no restrictions (can be used for any type of service).

Second, indicate how the staff person will generally spend their time.

Julia Dean's Time

70% Counseling or advocacy to clients (providing services, monitoring client service plans, documenting case notes)

30% Prevention work (preparing, scheduling and delivering presentations)

Now you are ready to calculate exactly how much each service should be paid for with the grants that support Julia's salary using the FFS Formula.

FFS Formula

$$\frac{\text{\% of salary supported by funding source}}{\text{\% of staff time spent doing fundable work}} \times 100 = \text{\% of service to be paid with this funding source}$$

When using this formula, work with one funding source or grant at a time and start with a more restrictive funding source. In our example, we have three funding sources (VCVA, VAWA, and DHS). Because the VCVA and VAWA grants are more restrictive than the DHS grant, we should start with one of them. We will start with the VCVA grant as this pays the largest portion of Julia's salary. Let's plug the information we have about Julia Dean into the formula.

% of salary supported by funding source	The VCVA grant supports 50% of Julia's salary.	% of service to be paid with this funding source

% of staff time spent doing fundable work	Julia spends 70% of her time doing VCVA fundable work.	The VCVA grant will pay for 71% of Julia's counseling and advocacy services, or all services that are VCVA-fundable!

Okay! Now we know that for all Julia's assigned services fundable with the VCVA grant (counseling and advocacy to clients), we will indicate that the VCVA grant will pay for 71% of these services in our FFS Statement.

We will NOT assign the VCVA funding source to any of Julia's Public Education and School service categories. These services comprise Julia's prevention work and are not fundable with the VCVA grant.

This may initially seem confusing, but let's think about this some more. In this example, a user may assume that because the VCVA grant pays 50% of Julia's salary, that the VCVA grant should also pay for 50% of Julia's time spent providing counseling and advocacy. This would be fine if Julia spent ALL of her work time on counseling and advocacy services to victims, but this only comprises 70% of her total work time. Julia spends nearly one third of her time (30%) doing prevention work, which is NOT fundable with the VCVA grant. Thus,

we need to increase the percentage that VCVA pays for her fundable services such as counseling and advocacy. If NOT, you would be under representing actual work paid for with the VCVA grant, because you would only be counting one half of 70% of Julia's work time (1/2 of 70% is only 35%), not half of ALL (100%) her work time. You want the VCVA grant to pay for half of Julia's work time because this grant pays for half of her salary.

We still have two more funding sources to factor into our formula, so let's move on to the next grant, VAWA Prevention. Again, you want to use more restrictive funding sources before less restrictive ones. Since we can use DHS funds for any kind of service, we will save that for last. Let's apply the VAWA numbers to the FFS Formula:

% of salary supported by funding source	The VAWA grant supports 25% of Julia's salary.	% of service to be paid with this funding source
-----	x 100 =	The VAWA grant will pay for 83% of Julia's prevention services, or the Public Education and School services.
% of staff time spent doing fundable work	Julia spends 30% of her time doing VAWA fundable work.	

Now we know that the VAWA Prevention grant will pay for 83% of the Public Education and School community services assigned to Julia in the FFS Statement. Thus far, our funding percentages look like as shown in Table 1.

Table 1
How VCVA and VAWA grants should pay for Julia Dean's services in FFS

Services/Programs	Funding Source	%
In-Person Counseling (S)	AG's Office - VCVA	71%
Legal Advocacy/Advocate (S)	AG's Office - VCVA	71%
Other Advocacy (S)	AG's Office - VCVA	71%
Telephone Counseling (S)	AG's Office - VCVA	71%
Public Education: Youth Organization (P)	VAWA Prevention	83%
School: High School (P)	VAWA Prevention	83%
School: Junior High (P)	VAWA Prevention	83%

The DHS grant is the last source that supports Julia's salary. Since DHS funds may be used to pay for any of Julia's services and every service must be fully paid for (or sum to 100%), we can complete the table by indicating that DHS pays for the remaining unpaid portion of each service. You shouldn't use the FFS funding formula for this last funding source. Instead, simply "fill in" all the remaining unpaid service portions so that each service is 100% paid. To

determine the unpaid portion of each service, simply subtract the already paid portion from 100 percent.

The VCVA grant pays for 71 percent of Julia’s four direct services. If we subtract this from 100 percent, the result is 29 percent ($100 - 71 = 29$). The DHS grant will pay for 29 percent of these service hours. Similarly, if we subtract the portion of VAWA funded prevention services (83 percent) from 100 percent ($100 - 83 = 17$), we now know that the DHS grant should pay for 17 percent of Julia’s three services comprising her prevention work. The final funding statement for Julia Dean should be as shown in Table 2 below. Notice that each service is now fully funded, indicated by the 100% column. Every service must be funded 100 percent to complete your FFS statement.

Table 1
Julia Dean’s final service and funding information in FFS

Services/Programs	%	Funding Source	%
In-Person Counseling (S)	100%	AG’s Office - VCVA	71%
		DHS	29%
Legal Advocacy/Advocate (S)	100%	AG’s Office - VCVA	71%
		DHS	29%
Other Advocacy (S)	100%	AG’s Office - VCVA	71%
		DHS	29%
Telephone Counseling (S)	100%	AG’s Office - VCVA	71%
		DHS	29%
Public Education: Youth	100%	VAWA Prevention	83%
		DHS	17%
School: High School (P)	100%	VAWA Prevention	83%
		DHS	17%
School: Junior High (P)	100%	VAWA Prevention	83%
		DHS	17%

STEP 5: ASSIGN FUNDING SOURCES TO SERVICES IN FFS

Now that you have determined how Julia’s funding sources will pay for each service she provides, you need to enter them into the FFS statement.

While viewing the FFS page with Julia Dean’s name selected and the first service selected (in this case In-Person Counseling), click **Assign Funding Source** as shown in Figure 5.

Figure 5

Client Services Reports Administration Logout DV Training Center

Center: DV Training Center

Date Issued: 7/1/2009 Add Delete

Selected Funding Funding History

Staff Selected Funding Staff Funding History

Edit Staff List Assign Services Multi-Fund Assignment Assign Funding Source

Staff	Services/Programs	Funding Source
Bunny, Easter (S)	In-Person Counseling (S)	
Contreras, Jazmin (S)	Legal Advocacy/Advocate (S)	
Day, Happy (S)	Other Advocacy (S)	
Dean, Julia (S)	Telephone Counseling (S)	
dena, Williams (S)	Public Education Youth Organization (P)	
Hiselman, Jennifer (S)	School: High School (P)	
Reindeer, Rudolph (S)		

Click Assign Funding Source button.

Julia Dean's name is selected so the Services/Programs column displays the services she provides.

The first service is selected so we can assign funding sources to pay for it.

After clicking the **Assign Funding Source** button, you will see a list of funding sources to select from as shown in Figure 6. Check the funding sources to pay for the staff person's time providing this service, and then indicate the percentage of time each funding source will pay. Finally, scroll down to the bottom of the Funding list and click **OK**.

Figure 6

Funding Selector -- Webpage Dialog

Center: DV Training Center

Staff Member: Dean, Julia (S)

Service: In-Person Counseling (S)

Instructions:

1. Select the funds that are to provide the funding and the percentage each fund will provide. Percentages for all funds must be 100%.
2. Click the OK button to apply changes or the Cancel Button to exit without changing.

Funds	%
<input type="checkbox"/> ABC123	
<input type="checkbox"/> ABC1237	
<input type="checkbox"/> abc124 Grant	
<input type="checkbox"/> ABC125Grant	
<input type="checkbox"/> ABC126 Grant	
<input type="checkbox"/> ABC128	
<input type="checkbox"/> ADVAF	0
<input type="checkbox"/> Agreement #201103	0
<input type="checkbox"/> Attorney General	0
<input checked="" type="checkbox"/> Attorney General VCVA	71

Check the correct funding sources and enter the corresponding percent of service time each funding source will pay. When the sum reaches 100%, scroll down to the bottom of the list and click OK.

When selecting from the **Funds** list, you must be sure that the correct grant is selected. This is especially important for VOCA or VAWA funds sub-granted through ICADV or ICASA. Statewide funding source names have been entered into InfoNet so the Coalitions may extract all funded activity statewide. If you are not sure what the correct name of the funding source is in InfoNet, contact someone at ICADV or ICASA. After selecting the funding sources from the **Fund** list displayed above, entering the percentages for each fund and clicking **OK** at the bottom, your FFS statement will then look as shown in Figure 7.

Multi-Fund Assignment button

FFS Report buttons

Staff

Bunny, Easter (S)
Contreras, Jazmin (S)
Day, Happy (S)
Dean, Julia (S)
dena, Williams (S)
Hiselman, Jennifer (S)
Reindeer, Rudolph (S)

Staff person Julia Dean is selected.

Services/Programs

Name	%
In-Person Counseling (S)	100
Legal Advocacy/Advocate (S)	0
Other Advocacy (S)	0
Telephone Counseling (S)	0
Public Education: Youth Organization (P)	0
School: High School (P)	0

In-Person Counseling is selected.

Funding Source

Funding Source	%
Attorney General VCVA	71
DHS-Domestic Violence	29

Funding information shows that of Julia Dean's time spent providing In-Person Counseling services, the VCVA grant pays for 71% of those hours, and DHS pays the other 29%.

Figure 7

Figure 7 above shows what your FFS statement page will look like after completing the funding information for just one of Julia's seven services. The other six services still have zeroes in the percent (%) column because they do not yet have funding information linked to them. Each service needs to have funding sources assigned to pay them for the FFS statement to be complete.

In the Julia Dean example, services are all not funded the same way. The four direct services (shaded yellow) are paid for with VCVA and DHS funds, while the three prevention services (shaded blue) are paid with VAWA Prevention and DHS funds. Therefore, we need to assign funding sources to each service one at a time.

IF you have a staff person whose services will all be funded in the same manner, then you may assign funding sources to all the services at the same time in one step using the **Multi-Fund Assignment** button (also shown in Figure 7). For example, if a staff person provides ten different services and a Victims of Crime Act (VOCA) grant pays for 100 percent of all ten of these services, you may use

the **Multi-Fund Assignment** button to link funding information (VOCA 100%) for all ten services at the same time.

STEP 6: CHECKING YOUR WORK

Once the above steps have been completed for each grant-funded staff member, your work can be checked in several ways.

- 1) Use the four report buttons near the top of the FFS page (also shown in Figure 7) to review all FFS data in one report. If you want to review information for the FFS statement date being viewed, click the **Selected Funding** button. To review multiple FFS statement dates, click the **Funding History** button. The **Staff Selected Funding** and the **Staff Funding History** button will generate the same information as the first two buttons, but the information will be limited to the selected staff name. This alleviates having to click on multiple names and services to double check your work.
- 2) You can also run standard reports with funding filters. You must turn the **Filters** button on from the standard reports page to view available data filters. Then, click the **Edit List** button on the **Funding** box to apply a funding filter. Select the grant for which you want to generate a report for, move the selection over from the right to the left, and click **OK**. Now click the **Generate** button to run the report. Do these numbers look like they accurately represent grant-specific activity?
- 3) If you ever question data displayed on standard reports with a funding filter, you will be able to see all the individual records used to compile the information by running a **Management – Staff/Client Service** report with the same funding filter. This report will display each individual staff person, client, service contact and hours used to come up with the numbers displayed on the standard report.
- 4) Another way of checking your work is to run **Standard Service Reports** using funding and staff filters. First, run a **Standard Service Report** using the **Staff** filter. Select the grant funded staff person, such as the name we used in the earlier example of Julia Dean. The report will only display service hours provided by Julia Dean. Now, run the same report again keeping the staff filter for Julia Dean but also adding a funding filter. If we add a funding filter for the VCVA grant, this second report should only show 71 percent of Julia's service hours for the four services funded with this grant. Thus, if the first report (using only the staff filter) indicated that Julia Dean provided 100 hours of in-person counseling, the second report with the funding filter for VCVA should display 71 hours of in-person counseling. If it does not, you may have entered FFS information incorrectly.

Frequently Asked Questions about InfoNet's Funding For Staff (FFS)

Q: *What if I'm adding a staff person to Funding For Staff that is replacing the position of a former staff, and all the funding and responsibilities will remain the same as the former staff?*

A: If a new staff person is filling a position recently left vacant by a former staff, AND the position's funding and responsibilities have not changed, follow these steps to make adding the new staff quick and easy.

- 1) Add the new staff person to the new funding statement.
- 2) Click the box just left of the new staff's name.
- 3) Click the **Assign Services** button (heading over middle column that shows services for each staff person)
- 4) In the Program/Service Selection window, click the drop down field arrow near the top left labeled **Match Services For:**.
- 5) Select the name of the former staff person whose position is being replaced with the new staff person.
- 6) Click **OK**.

All the new staff's service and funding information will be identical to the former staff. You may now also remove the former staff name from the statement at this point since the information is no longer needed.

Q: *Our program has multiple locations and a different InfoNet Logon for each site. Do I need to enter separate funding statements for each site?*

A: Yes, if grant funded staff are providing services from multiple locations. For example, if your program has three sites and one grant funded staff person provides services from two of the three sites, you would need to include this staff person in the funding statements for the two sites from which she works.

Q: *Why would a volunteer be included on a funding statement as they are not paid?*

A: Although volunteers are not paid, there may be a paid volunteer coordinator position supported with grant funds. If the funder wants to see activities of all the volunteers recruited and trained by this grant funded staff person, you will need to include such volunteers in your funding statement.

If you have questions regarding FFS or are having difficulty setting up your FFS statement, please contact ICJIA at 312-793-8550 or cja.infonethelp@illinois.gov.