Helpful Application Tips

1. **Google Chrome**. While the *New York State School Funding Transparency Form* can be completed in all internet browsers, it is recommended users complete the form in Google Chrome.

2. **Accessing the Application.**
   a. *Logging in for the first time?* Superintendents accessing the Application <u>for the first time for their district</u> will have a username and temporary password emailed to them upon release of the new reporting cycle. This includes superintendents that have recently begun employment at a new school district. School Business Officials and other users new to the Application must be granted access by their superintendent.
   b. *Accessed the Application before?* Superintendents and other users with existing accounts will receive an email with a reminder of their username upon release of the new reporting cycle for the *New York State School Funding Transparency Form.*

3. **Missing Email.** Email communications primarily come from: sft-noreply@budget.ny.gov. Ensure your spam filters permit messages from this email address. If you require assistance, contact your internal IT department.

4. **District Staff Access.** Superintendents must provision other staff members to use the Application and work on the district's *New York State School Funding Transparency Form.* To do so:

   1. Log into the application.
   2. Select the "Users and Access" menu option on the top right tool bar.
   3. Select the "Add User" button.
   4. Fill out the user's information.
   5. Select the Role(s) the new user should have and click, "Save".

5. **Logging In with the Wrong NY.Gov Account.** If a user accidentally attempts to login using an NY.Gov account whose email address does not match the user's *School Funding Transparency Application* account information, users must <u>exit/quit/close</u> out of their browser completely, reopen their browser, and then sign into the Application with the correct NY.Gov account. You can check your NY.Gov username at this link.

6. **Save Frequently, Save Often!** It is recommended that users save their progress often by clicking the "Save" buttons in the top-left hand corner or bottom-left hand corner of each screen. A green notification banner will inform the user that their data has been saved in the Application.

7. **Inactivity Protections**. For user and district protection, after 25 minutes of inactivity, users will receive a session time out notification stating, "Your session is about to expire, please press Continue to stay logged in." After five more minutes of inactivity (30 minutes total of inactivity), users will be logged out of the Application and any unsaved data will be lost.

8. **Bulk Uploading Data**. Bulk upload data templates are available on the first screens of Parts B – E, respectively. These templates can be downloaded by clicking the "Download" button below the toolbar for each part. If data for a specific part has been manually entered into the Application prior to downloading that part's Excel template, the manually entered data will also be populated into the Excel template for users. Excel templates will contain any data already saved in the Application at the time the template is downloaded.

9. **Matching Totals**. To help districts troubleshoot mismatching data within the form, Part B-II, Part C, Part D-I, and Part D-II display districtwide values from other dependent parts of the form below the auto calculated "District Totals" row at the bottom of each table. If corresponding districtwide totals are not equal (when they should be) and in violation of a validation rule, the difference will be displayed in red and the form cannot be submitted to New York State.

10. **Common Data Elements Requiring Additional Information**. As a reasonability check, NYS compares the data in districts' annual School Funding Transparency submissions to similar data available from other sources, including districts' submissions for the prior year and other data sets maintained by the State Education Department. Significant unexplained variances from such other data often lead to NYS staff requesting additional information from districts to explain the variances.