County Plan

Add County Plan

1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are submitting your County Plan.
3. Select the Fiscal Year Set Up link
4. Enter your **Excess Funds Carry** over amount from the prior year.
5. Click the **Save** button.
6. Select the Prior Page link.
7. Select the County Plan link
8. Select the Add a County Plan link
9. Determine if you want to add a plan using a blank template or copy data from an existing plan and select the appropriate link.
10. Select the link for each web form and complete the all fields listed. The forms to be completed are Entity, Service/Activity, Client Projections, Capacity Projections, Plan Questions and Plan Description Files. SATTA (SB 223) plan questions are included in these forms.
11. Click **Save** after entering data on each web form.

Update County Plan

1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are updating your county plan.
3. Select the County Plan link
4. Select the Update or View an Existing County Plan link
5. Select the link of the plan you wish to update (links are Plan Type, Version and Status).
6. Select the link for each web form and complete the all fields listed. The forms to be completed are Entity, Service/Activity, Client Projections, Capacity Projections, Plan Questions and Plan Description Files. SATTA (SB 223) plan questions are included in these forms.
7. Click **Save** after updating each web form.

Delete County Plan

1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are updating your county plan.
3. Select the County Plan link
4. Select the Delete an Existing County Plan link.
5. Click the **Delete** button next to the County Plan you wish to delete.

Financial Status Report

Add Financial Status Report
1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are submitting your Financial Status Report.
3. Select the Financial Status Report link
4. Select the Add a Financial Status Report link
5. Determine if you want to add a report using a blank template or copy data from an existing report and select the appropriate link.
6. Select the Financial Status Report link.
7. Enter Excess Funds Carried Over from the Prior Fiscal Year.
8. Enter Outlays (Expenditures) for Drug Treatment, Additional Services, and Other Services for the fiscal year.
9. Enter Income from Other Income, Client Fees, Providers for Audit Exceptions, and County/Local Agencies for the fiscal year.
10. Click **Save**.

Update Financial Status Report
1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are updating your county plan.
3. Select the Financial Status Report link
4. Select the Update or View an Financial Status Report link
5. Select the link of the report you wish to update (the report status acts as a link to the report).

11. Select the Financial Status Report link.
12. Update fields as necessary.
13. Click **Save**.

Delete County Plan
1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are updating your county plan.
3. Select the Financial Status Report link
4. Select the Delete an Existing Financial Status Report link.
5. Click the **Delete** button next to the Financial Status Report you wish to delete.

Expenditure, Client Counts and Wait List Report

Add Expenditure, Client Counts and Wait List Report

1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are submitting your Expenditure, Client Counts and Wait List Report.
3. Select the Fiscal Year Set Up link
4. Update your **Excess Funds Carry** over amount from the prior year if necessary.
5. Click the **Save** button.
6. Select the Prior Page link.
7. Select the Expenditure, Client Counts and Wait List Report link for the appropriate period.
8. Select the Add a Expenditure, Client Counts and Wait List Report link
9. Determine if you want to add a plan using a blank template or copy data from an existing report and select the appropriate link.
10. Select the link for each web form and complete the all fields listed. The forms to be completed are Entity, Service/Activity, Case Management Client Counts, Other Services Client Counts, and Wait List. SATTA (SB 223) expenditure and client count questions are included in these forms.
11. Click **Save** after entering data on each web form.

Update Expenditure, Client Counts and Wait List Report

1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are updating your Expenditure, Client Counts and Wait List Report.
3. Select the Expenditure, Client Counts and Wait List Report link for the appropriate period.
4. Select the Update or View an Existing Expenditure, Client Counts and Wait List Report link
5. Select the link for each web form and complete the all fields listed. The forms to be completed are Entity, Service/Activity, Case Management Client Counts, Other Services Client Counts, and Wait List. SATTA (SB 223) expenditure and client count questions are included in these forms.
6. Click **Save** after updating each web form.

Delete Expenditure, Client Counts and Wait List Report

1. Select the Submissions link on the Navigation bar.
2. Select the link of the fiscal year for which you are updating your Expenditure, Client Counts and Wait List Report.
3. Select the Expenditure, Client Counts and Wait List Report link for the appropriate period.
4. Select the Delete an Existing Expenditure, Client Counts and Wait List Report link.
5. Click the **Delete** button next to the Expenditure, Client Counts and Wait List Report you wish to delete.