Hints and Tips for Using Treasury’s Portal

Designating SLFRF Points of Contact by SLFRF Account Administrators

This Hints and Tips document provides a brief instruction for SLFRF Account Administrators on accessing Treasury’s Portal to provide the names and contact information of officials to be designated as your organization’s points of contact for the SLFRF award(s). The following pages provide step-by-step guidance. See Section B for commonly asked questions/answers on this topic.

Note - the screens noted below may be subject to change.

Section A: Instructions

Step 1
You must be registered in the ID.me system to access Treasury’s Portal. You can refer to the accompanying guidance on registering in the ID.me system. If you have questions about registering in ID.me, please email SLFRP@treasury.gov.

Step 2
Once you are registered in ID.me, click on the link in the email you received requesting the POC designations. If you do not have the email link, please email us via SLFRP@Treasury.gov and we will provide the link.

Step 3
The link will take you to the Treasury Portal “State, Local, and Tribal Support” landing page as shown below. Once on that page, click on the Go to Your Report button at the bottom left of the screen, as indicated in by the red arrow below.

Step 4
The green Go to Your Report button will take you to the Submissions and Compliance page as
shown below. Once on that page, click on the three-line navigation icon at the top left of the screen. The red arrow below is pointing to the icon.

Step 5
After clicking on the three-line navigation icon, a drop-down menu will appear on the top left of the screen as shown below. Please click on “Account” from the drop-down menu, as shown by the red arrow below.

Step 6
Next you will see the screen below. Under the “Account Name” heading, click on the name of your organization (as shown by the red arrow).

Step 7
By clicking the name of your organization, Treasury’s portal will open to allow you to provide names and contact information on your organization’s designees for the SLFRF reports, as shown below. The landing page provides basic information about the designations. Please see section B for more details about the roles and responsibilities for each or the three roles.
Step 8
When you are ready to key in the names of the designated individuals, click on the “Certification” button on the left navigation bar, as noted in the red arrow as shown below.

Step 9
On the “Official Certification of Authorization” screen, you should type in your name to indicate you are authorized to submit the names of the designated individuals. Once you enter your name, click on the Submit button.
Step 10
Next, click on the “Designation Form” button on the left navigation bar, as noted by the red arrow shown below.

Step 11
Clicking on the “Designation Form” button will open the “Designation of Account Administrator, Point of Contact for Reporting, and Authorized Representative for Reporting” screen shown below.

You can use the Designation Form to enter the names and contact information for each of the three designations for each of you SLFRF allocations.

The roles for the SLFRF allocations are displayed as follows:

- SLFRF – Account Administrator
- SLFRF – Point of Contact for Reporting
- SLFRF – Authorized Representative for Reporting

The Designation Form screen shows nine data fields for entering key information about the individual being designated. These include:
• Salutation (optional)
• First Name
• Middle Name (optional)
• Last Name
• Suffix (optional)
• Title
• Phone
• Email
• Name of Entity/Organization (Recipient entity)

Note: The screen will display a list at the bottom of the screen with the names and contact information of individuals (if any) who have previously been designated for any of the three roles. This list will be important in maintaining and updating your organization’s designees in the future.

a. **Designation of the Account Administrator**

Remember, we have temporarily authorized you as the SLFRF – Account Administrator. There is no need to re-enter your name and contact information if you plan to continue in that role. If you need to designate someone else as the SLFRF Account Administrator,

• Find your name at the bottom of the screen.
• Hit the blue *Edit* button located to right of your name.
• Enter the name and contact information of the new SLFRF Account Administrator.
• Hit the blue *Complete* button.

b. **Designation of Point of Contact for Reporting and Authorized Representative for Reporting**

• Enter the next designee's name and contact information.
• After entering their name and required contact information, select the Program Role(s) for which he/she is being designated.
• Once the role is selected, click on the small arrow to the right of the role, which will move the role to the box on the right.
• Click on the *Complete* button at the bottom of the screen.
• Follow the same process for each of the remaining designees.
• When you have entered all three designations, please press the *Complete* button.
• As a final step, go to the icon on the upper right of the screen as shown below to exit the system.
Section B: Questions and Answers

Who is authorized to designate the Account Administrator, the Point of Contact for Reporting, and the Authorized Representative for Reporting for my organization’s SLFRF’s award?

Treasury requests that each SLFRF should follow its own decision-making procedures in making the three designations for each award.

What is the deadline for making the designation?

Treasury requests that use Treasury’s portal to make the three designations as soon as possible to enable your organization to submit its Interim Report and Recovery Plan Performance Report (if applicable) by the August 31, 2021 submission due date.

What are the responsibilities for each of the three designated roles?

The required roles are as follows:

- **Account Administrator** for the SLFRF award has the administrative role of maintaining the names and contact information of the designated individuals for SLFRF reporting. The Account Administrator is also responsible for working within your organization to determine its designees for the roles of Point of Contact for Reporting and Authorized Representative for Reporting and providing their names and contact information via Treasury’s Portal. The Account Administrator can also view and submit reports. Finally, the Account Administrator is responsible for making any changes or updates as needed over the award period. We recommend that the Account Administrator identify an individual to serve in his/her place in the event of staff changes.


- **Point of Contact for Reporting** is the primary contact for receiving official Treasury notifications about reporting on the SLFRF award, including alerts about upcoming reporting, requirements, and deadlines. The Point of Contact for Reporting is responsible for completing the SLFRF reports, but cannot certify and submit these reports.

- **Authorized Representative for Reporting** is responsible for certifying and submitting official reports on behalf of the SLFRF award recipient. Treasury will accept reports or other official communications only when submitted by the Authorized Representative for Reporting. The Authorized Representative for Reporting is also responsible for communications with Treasury on such matters as extension requests and amendments of previously submitted reports. The official reports may include special reports, monthly reports, quarterly reports, interim reports, and final reports.

**May my organization designate one individual for multiple roles?**
Yes, an individual may be designated for multiple roles. For example, the individual designated as the Account Administrator can also be designated as the Authorized Representative for Reporting or Point of Contact for Reporting. It is also acceptable for an organization to designate one individual for all three roles however it should also adhere to any applicable rules on personnel checks and balances.

**May my organization designate more than one individual per role?**
Yes, you may designate more than one person per each role but are encouraged to limit the number of users assigned to each role.

**May my organization change the designations from time to time?**
Yes, an organization may make changes and updates to the list of designation individuals whenever needed.

**Must each of the designated individuals register for using Treasury’s Portal?**
Yes, everyone designated for any of the roles must register with ID.me before they will be given access to Treasury’s portal. Please contact us at the email address below for more information and guidance on registering with ID.me.

**Additional Questions or Additional Assistance?**
If you have additional questions about accessing or using Treasury’s portal to provide the designees’ names and contact information, please send us an email via SLRFP@treasury.gov.