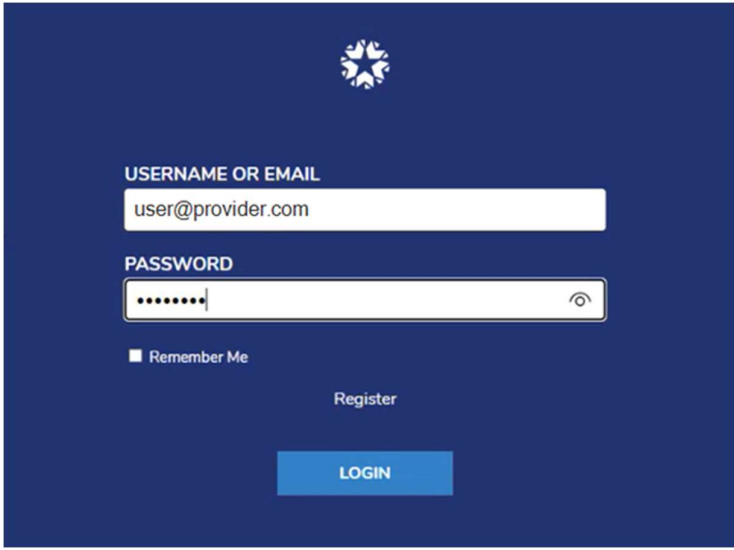
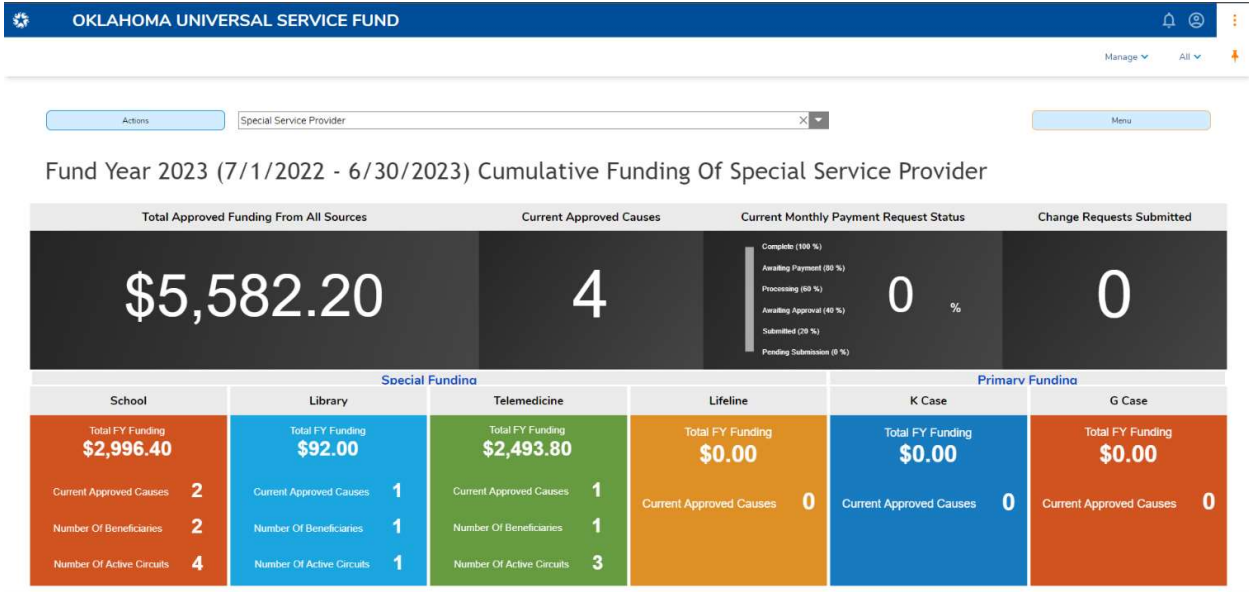
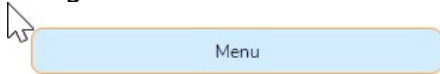


Training Handout: Historic Funding

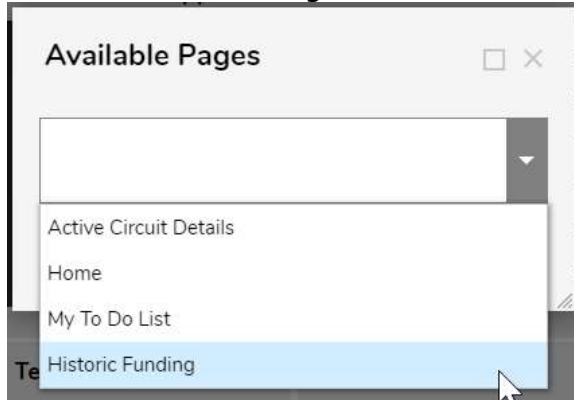
Overview: The following training handout reviews step-by-step instructions on how to navigate the "HISTORIC FUNDING" tab. This is where historical provider funding can be viewed.

Step	Action																																																				
1.	Login: https://occ.decisions.com/ 																																																				
2.	Provider Dashboard/Home will automatically open upon login.  <table border="1"> <thead> <tr> <th colspan="2">Total Approved Funding From All Sources</th> <th colspan="2">Current Approved Causes</th> <th colspan="2">Current Monthly Payment Request Status</th> <th colspan="2">Change Requests Submitted</th> </tr> </thead> <tbody> <tr> <td colspan="2">\$5,582.20</td> <td colspan="2">4</td> <td colspan="2">0 %</td> <td colspan="2">0</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="3">Special Funding</th> <th colspan="3">Primary Funding</th> </tr> <tr> <th>School</th> <th>Library</th> <th>Telemedicine</th> <th>Lifeline</th> <th>K Case</th> <th>G Case</th> </tr> </thead> <tbody> <tr> <td>Total FY Funding \$2,996.40</td> <td>Total FY Funding \$92.00</td> <td>Total FY Funding \$2,493.80</td> <td>Total FY Funding \$0.00</td> <td>Total FY Funding \$0.00</td> <td>Total FY Funding \$0.00</td> </tr> <tr> <td>Current Approved Causes 2</td> <td>Current Approved Causes 1</td> <td>Current Approved Causes 1</td> <td>Current Approved Causes 0</td> <td>Current Approved Causes 0</td> <td>Current Approved Causes 0</td> </tr> <tr> <td>Number Of Beneficiaries 2</td> <td>Number Of Beneficiaries 1</td> <td>Number Of Beneficiaries 1</td> <td></td> <td></td> <td></td> </tr> <tr> <td>Number Of Active Circuits 4</td> <td>Number Of Active Circuits 1</td> <td>Number Of Active Circuits 3</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Total Approved Funding From All Sources		Current Approved Causes		Current Monthly Payment Request Status		Change Requests Submitted		\$5,582.20		4		0 %		0		Special Funding			Primary Funding			School	Library	Telemedicine	Lifeline	K Case	G Case	Total FY Funding \$2,996.40	Total FY Funding \$92.00	Total FY Funding \$2,493.80	Total FY Funding \$0.00	Total FY Funding \$0.00	Total FY Funding \$0.00	Current Approved Causes 2	Current Approved Causes 1	Current Approved Causes 1	Current Approved Causes 0	Current Approved Causes 0	Current Approved Causes 0	Number Of Beneficiaries 2	Number Of Beneficiaries 1	Number Of Beneficiaries 1				Number Of Active Circuits 4	Number Of Active Circuits 1	Number Of Active Circuits 3			
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Number Of Beneficiaries 2	Number Of Beneficiaries 1	Number Of Beneficiaries 1																																																			
Number Of Active Circuits 4	Number Of Active Circuits 1	Number Of Active Circuits 3																																																			

3. Navigate to "Menu"

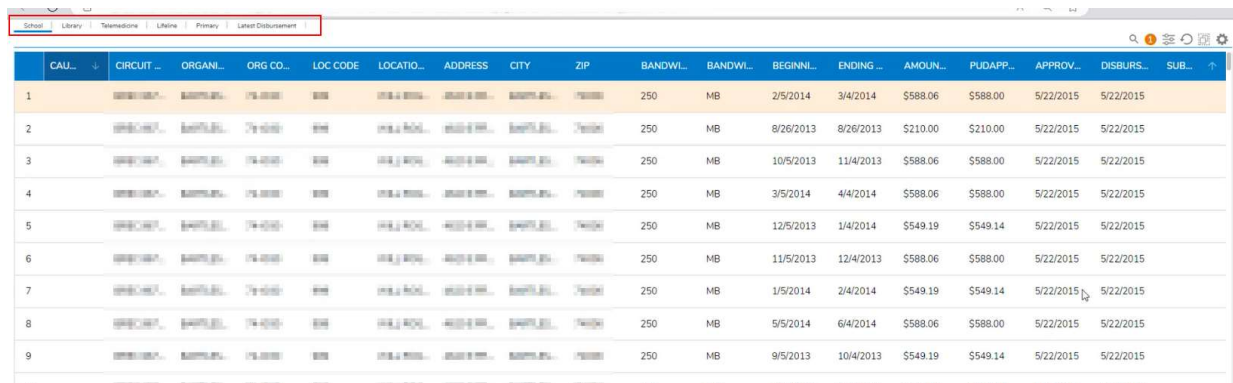


4. Select "Historic Funding"



5. The "Historic Funding" page will automatically open on a separate tab.

- Explore the different funding types of histories via the tabs:
 - School: Running history of all funding the provider has received for schools.
 - Library: Running history of all funding the provider has received for libraries.
 - Telemedicine: Running history of all funding the provider has received for telemedicine.
 - Lifeline: Running history of all funding the provider has received for lifelines.
 - Primary: Running history of all funding the provider has been approved for, regarding primary funding.
 - Latest Disbursement: A high-level reconciliation of the provider's most recent disbursement payment, by cause number and funding type. This replaces the previous Vantage Point monthly statements.
 - Disclaimer: once a new disbursement has been received the prior report is replaced with the breakdown to reflect the most recent disbursement. Prior "latest disbursement" summaries are not available once updated.



CALL...	CIRCUIT...	ORGANI...	ORG CO...	LOC CODE	LOCATIO...	ADDRESS	CITY	ZIP	BANDWL...	BANDWL...	BEGINNL...	ENDING...	AMOUN...	PUDAPP...	APPROV...	DISBURS...	SUB...
1									250	MB	2/5/2014	3/4/2014	\$588.06	\$588.00	5/22/2015	5/22/2015	
2									250	MB	8/26/2013	8/26/2013	\$210.00	\$210.00	5/22/2015	5/22/2015	
3									250	MB	10/5/2013	11/4/2013	\$588.06	\$588.00	5/22/2015	5/22/2015	
4									250	MB	3/5/2014	4/4/2014	\$588.06	\$588.00	5/22/2015	5/22/2015	
5									250	MB	12/5/2013	1/4/2014	\$549.19	\$549.14	5/22/2015	5/22/2015	
6									250	MB	11/5/2013	12/4/2013	\$588.06	\$588.00	5/22/2015	5/22/2015	
7									250	MB	1/5/2014	2/4/2014	\$549.19	\$549.14	5/22/2015	5/22/2015	
8									250	MB	5/5/2014	6/4/2014	\$588.06	\$588.00	5/22/2015	5/22/2015	
9									250	MB	9/5/2013	10/4/2013	\$549.19	\$549.14	5/22/2015	5/22/2015	

6. Definition of primary tab column descriptions:

- **APPROVED AMOUNT:** Total approved funding amount
- **APPROVED FUNDING DATE:** Date the Primary funding was initially approved.
- **AMOUNT:** The amount of funding that was disbursed on the Disbursement date.
- **DISBURSEMENT DATE:** The date that funding was disbursed.
- **REMAINING BALANCE:** If the approved funding has not been fully disbursed, a remaining balance will show on the most recent disbursement row.

School | Library | Telemedicine | Lifeline | Primary

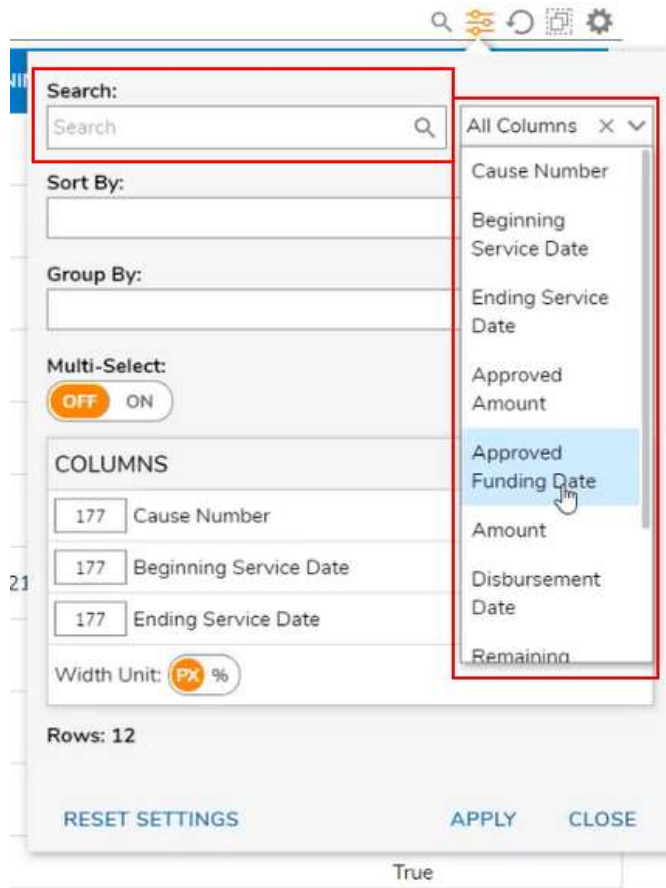
Outstanding Remaining Balance: \$1,235,213.50

Report Viewer

CAUSE NUMBER	BEGINNING SERV...	ENDING SERVICE...	APPROVED AMO...	APPROVED FUN...	AMOUNT ↓	DISBURSEMENT ...	REMAINING BAL...	SUBMISSION RE...	IS LUMP SUM
1	2018	1/1/2022	12/31/2022	\$1,500,000.00	5/12/2022	\$87,648.18	5/25/2022		True
2	2018	1/1/2022	12/31/2022			\$15,516.91	6/25/2022		
3	2018	1/1/2022	12/31/2022			\$3,871.55	8/25/2022		
4	2018	1/1/2022	12/31/2022			\$853.25	12/25/2022		
5	2018	1/1/2022	12/31/2022			\$55,716.22	1/25/2023		

7. All tabs have some filtering features:

- **Search:** anything typed in the box will be searched in all columns, unless "All Columns" is changed on the drop-down to only search a specific column.



Search:

Sort By:

Group By:

Multi-Select: OFF ON

COLUMNS

- 177 Cause Number
- 177 Beginning Service Date
- 177 Ending Service Date

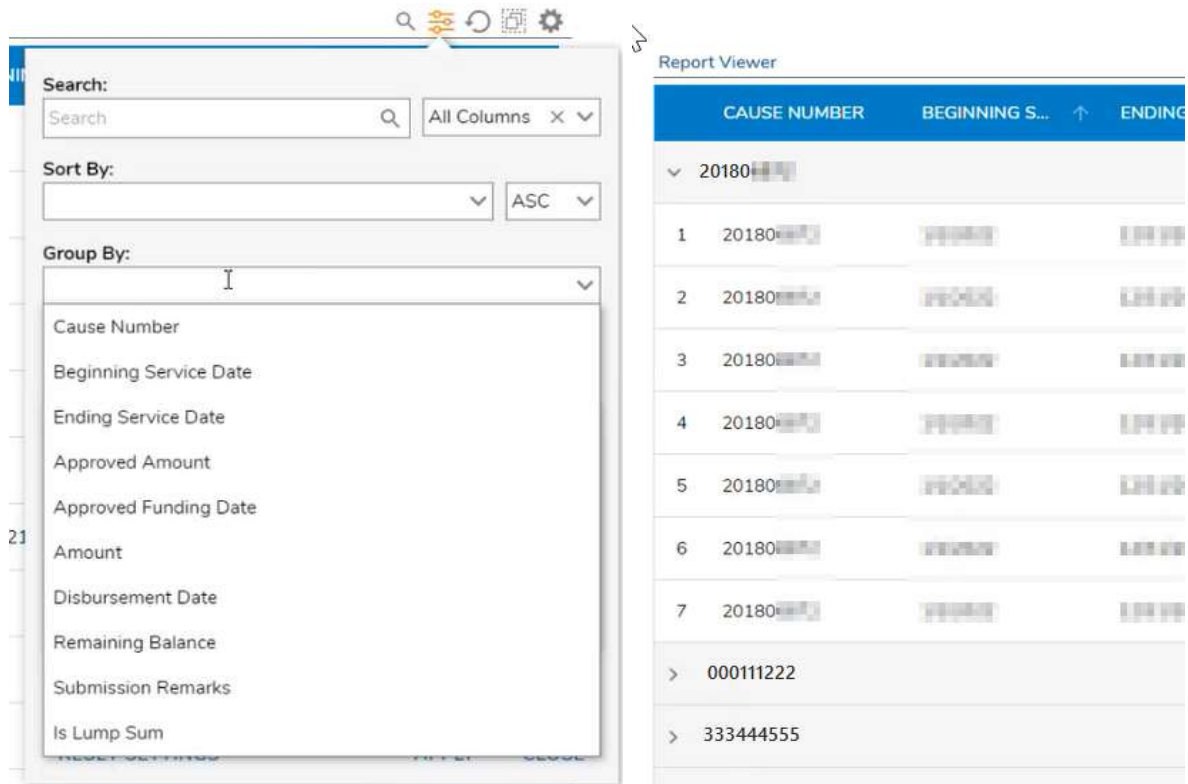
Width Unit: PX %

Rows: 12

RESET SETTINGS APPLY CLOSE

True

- Group By: once an item is selected and applied, the line items will be grouped by the selected items.
 - i.e.: Selecting to group by Cause Number, there will be groupings by Cause Numbers



The screenshot displays a software interface for a report viewer. On the left, there is a control panel with the following sections:

- Search:** A search input field with a magnifying glass icon and a dropdown menu labeled "All Columns".
- Sort By:** A dropdown menu and a button labeled "ASC".
- Group By:** A dropdown menu with a list of options: Cause Number, Beginning Service Date, Ending Service Date, Approved Amount, Approved Funding Date, Amount, Disbursement Date, Remaining Balance, Submission Remarks, and Is Lump Sum.

On the right, the "Report Viewer" displays a table with the following columns: CAUSE NUMBER, BEGINNING S..., and ENDING. The table content is as follows:

	CAUSE NUMBER	BEGINNING S...	ENDING
▼	20180		
1	20180		
2	20180		
3	20180		
4	20180		
5	20180		
6	20180		
7	20180		
>	000111222		
>	333444555		