

Local Oral Health Program SharePoint Site Training Frequently Asked Questions and Answers

Q1: Should Local Oral Health Programs (LOHPs) continue to submit progress reports, budget revisions, and/or invoices by email?

A: LOHPs only need to submit progress reports, budget revisions, and invoices using the designated SharePoint folders from this point moving forward. Email submission is no longer needed. If edits are needed and/or once approved, your program consultant (PC) or grant manager (GM) will notify you.

Q2: Does the Office of Oral Health (OOH) prefer Word documents or PDFs for Work Plan deliverables?

A: OOH does not have a preference which file type is used for submission of Work Plan deliverables.

Q3: Should we upload approved invoices ourselves or will OOH move them when approved?

A: When approved, OOH will move approved documents into the “Approved” folder, including invoices. You do not need to move any documents between folders after they have been submitted. You will be notified by email when documents are approved.

Q4: Should backup documentation for invoices be uploaded to SharePoint?

A: No, backup documentation for invoices should not be uploaded to SharePoint. Only invoices using the [OOH-approved template](#) need to be uploaded.

Q5: Will previously approved documents from the current grant cycle be uploaded to SharePoint?

A: No, only documents due from this point forward will be submitted by the LOHP using SharePoint and will be preserved in SharePoint once approved. Previously approved documents will not be uploaded.

Q6: Can files be deleted once uploaded?

A: Only OOH can delete files due to workflow and notification system requirements. You may edit or replace files as needed. Please notify your LOHP’s respective GM or PC after editing or replacing a file.

Q7: Does “Summary Narrative” under the Progress Reports folder refer only to the Successes, Challenges, Lessons Learned, Recommendations and Technical Assistance document?

A: Yes, the Summary Narrative folder is for this document only, typically submitted with every progress report.

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Q8: If LOHP staff uploads a document by mistake, what are the next steps?

A: Contact your GM or PC and they will remove the document for you.

Q9: Who should we contact for SharePoint troubleshooting?

A: If you are experiencing challenges accessing the SharePoint, you should first contact your local agency's IT team. If the issue is related to multifactor authentication, contact Vyshiali at Vyshiali.Sundararajan@cdph.ca.gov. For general utilization challenges, contact your assigned PC.

Q10: Will LOHP fiscal teams receive SharePoint training information?

A: Yes, OOH will send follow-up emails with materials. If any staff members from your LOHP are missing from the contact list, please complete the [Staff Update Form](#).

Q11: Will the fiscal team get access to SharePoint automatically?

A: No. SharePoint access is not automatic. Staff must complete the training or watch the recording and submit the [SharePoint Site Access Form](#) before access is granted.

Q12: How long is the SharePoint invitation link active? Does it expire?

A: The link should not expire once your email is added. If you experience challenges accessing the link, please contact OOH.

Q13: Who received initial access to SharePoint?

A: LOHP staff who registered for the SharePoint training sessions. Others must review materials and complete the [SharePoint Site Access Form](#) to gain access.

Q14: Does everyone in the LOHP Staff Roster automatically receive SharePoint access?

A: No, the mailing list is separate from SharePoint access. Only those who registered for the SharePoint training or confirmed review of training materials will receive access.

Q15: Can staff not on the LOHP budget (e.g., managers) be added to the roster?

A: Yes, anyone who needs to receive notifications can be added. Please complete the [Staff Update Form](#) to add team members to the roster.

Q16: Will LOHPs receive an email when PR review letters are uploaded?

A: Yes, your PC will notify you by email when a PR review letter is uploaded.

Q17: What if LOHP staff cannot gain access to SharePoint before an upcoming deadline (e.g., FY 25/26 mid-year budget revision)?

A: Your LOHP may submit via email until SharePoint access issues are resolved.