



LOHP SharePoint Training

March 18 and 25, 2026

Participant Questions

- Use the chat and/or raise hand features to ask questions. Questions will be answered at the end of the training.
- **After Meeting:** Submit additional questions to OfficeofOralHealth@cdph.ca.gov, your grant manager, and/or your program consultant.
- **Summary of Q&A:** Q&As will be compiled and shared following the meeting.

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SharePoint Overview

What is Microsoft SharePoint?

- A web-based collaborative platform
- A secure place to store, organize, share, and access files/ resources
- A collection of pages, lists, and libraries that can be integrated with other Microsoft apps, like Power Automate, to create workflows

Why start using SharePoint?

- To overcome difficulties posed by email submission of documents (e.g., file size too large for attachment)
- To better manage and organize LOHP grant documents
- To streamline document submission workflows
- To track LOHP staff changes and keep lists up to date
- And so much more!

LOHP SharePoint Site Structure

- Home Page
- Document Submission
- SharePoint Tutorials
- Due Dates
- LOHP Staff Roster and Staff Update Form
- FAQ

SharePoint Home Page



Microsoft 365



Local Oral Health Programs

Restricted Share ...

- [Home](#)
- [Document Submission](#)
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- [Due Dates](#)
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- [FAQ](#)

This site is designed to simplify document submissions by LOHPs to the Office of Oral Health (OOH). Prior to this site, invoices, budget revisions, progress reports, and Work Plan deliverables were emailed to OOH grant managers and program consultants. Those days are over, now that we have this SharePoint site!

This SharePoint site will also facilitate tracking and reporting of LOHP staff changes, as well as provide information about upcoming due dates.

To learn more about this SharePoint site and how to submit documents, visit the SharePoint Tutorials Library, which you can access from the main menu.

Once you are ready to submit a document for review, go to the Document Submission Library by clicking your LOHP name on the map below.

CALIFORNIA



Quick Links and Due Dates

CDPH Microsoft 365 Search this site

CDPH Local Oral Health Programs Home Document Submission SharePoint Tutorials Due Dates LOHP Staff Roster FAQ Recycle bin

Quick links

- CA Office of Oral Health (OOH)
- CA Oral Health Technical Assistance Center...
- Slack - LOHP Workspace
- National Maternal and Child Oral Health Resourc...
- Association of State & Territorial Dental Directors...
- National Network for Oral Health Access (NNOHA)
- Clear Impact Results-Based Accountability (RBA)...
- System for California Oral Health Reporting...
- Centers for Disease Control and Prevention (CDC)
- Smile California

Due Dates See all

Edit in grid view Share Copy link Export to Excel All Items

Name	Description	Due Date ↑	Attachments
Mid-Year Budget Revision (if needed)	Realign current year budget, if needed	4/30/2026	
Q3, Year 4 Invoice	Invoice period: January 1 - March 31, 2026	5/31/2026	
Work Plan Deliverables: 1.4, 1.4.c (A), 2.4.d(A), 2.4.e(B), 6.3(A), 6.4.b(A), 6.4.c(B), 6.4.e(A), 6.4.e(B), 7.1.d(A), 7.1.g(A)	The following Work Plan deliverables are due on this date: <ul style="list-style-type: none">1.4, 1.4.c(A). Coi Health Improvement Plan (CHIP): Update CHIP and Action Plan2.4.d(A).	6/30/2026	

SharePoint Tutorials

- Library of step-by-step instructions for all things SharePoint

The screenshot shows a SharePoint library interface. At the top left is the CDPH logo. The page title is 'Local Oral Health Programs' with a 'Restricted' lock icon. A search bar contains the text 'Search this library'. The navigation menu includes 'Home', 'Document Submission', 'SharePoint Tutorials' (highlighted with a red box), 'Due Dates', 'LOHP Staff Roster', 'FAQ', and 'Recycle bin'. Below the navigation, there are view options: 'Edit in grid view', 'Export to Excel', 'Automate', and a menu icon. A filter bar shows 'All Documents' selected, along with icons for Word, Excel, PowerPoint, and PDF. The main content area has a table with columns 'Name' and 'Modified'. One entry is visible: '1. LOHP Staff' with a modified date of '9/22/2025 11:41 PM'.

Name	Modified
1. LOHP Staff	9/22/2025 11:41 PM

Due Dates

The screenshot shows a Microsoft 365 SharePoint interface for the 'Local Oral Health Programs' site. The 'Due Dates' list is displayed with the following items:

Name	Description	Due Date ↑	Attachments
Mid-Year Budget Revision (if needed)	Realign current year budget, if needed	4/30/2026	
Q3, Year 4 Invoice	Invoice period: January 1 - March 31, 2026	5/31/2026	
Work Plan Deliverables: 1.4, 1.4.c (A), 2.4.d(A), 2.4.e(B), 6.3(A), 6.4.b(A), 6.4.c(B), 6.4.e(A), 6.4.e(B), 7.1.d(A), 7.1.g(A)	The following Work Plan deliverables are due on this date:	6/30/2026	

LOHP Staff Roster

CDPH SharePoint

Search this list

CDPH Office of Oral Health

Local Oral Health Programs

Home Document Submission SharePoint Tutorials Due Dates **LOHP Staff Roster** FAQ Dashboard Recycle bin Edit

Restricted No

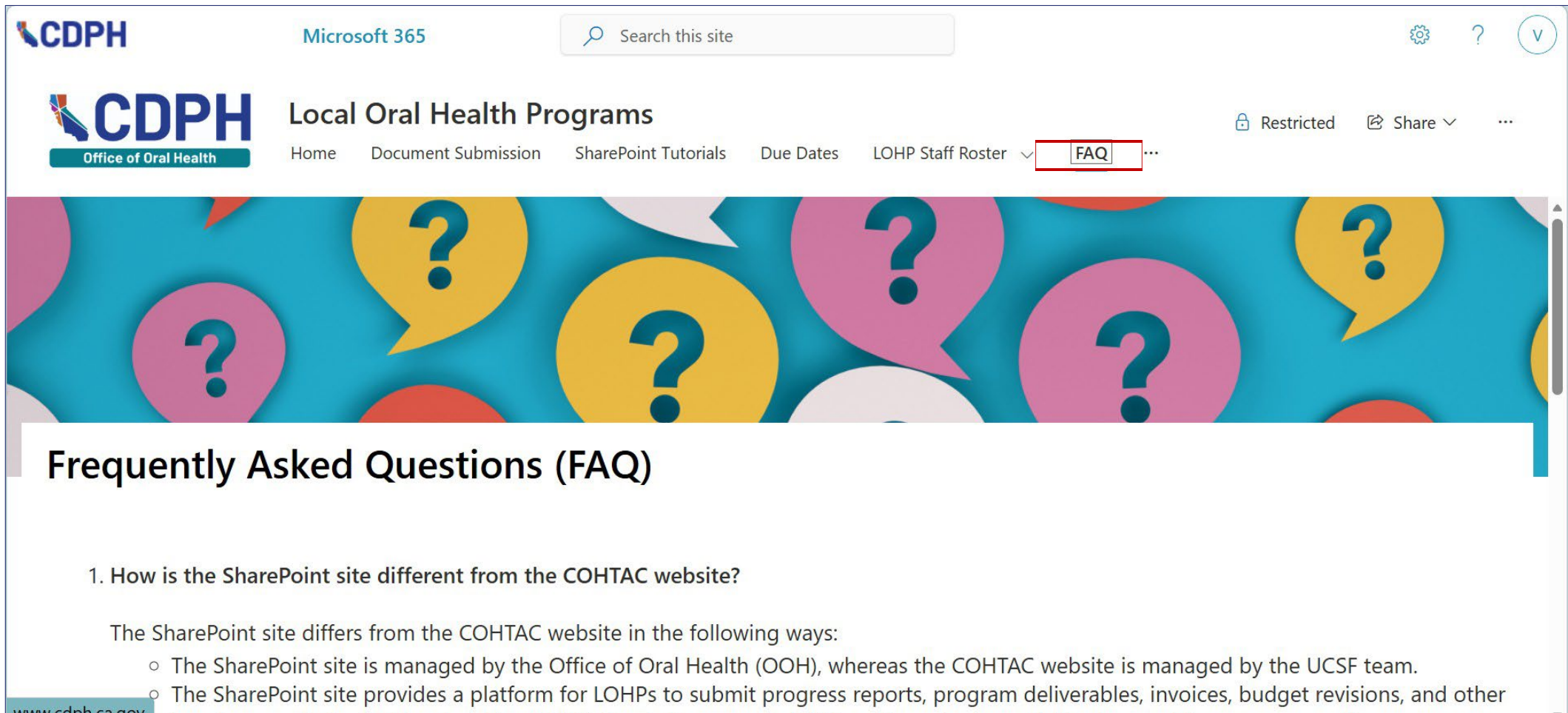
+ Add new item Edit in grid view Undo Share Copy link Export Forms Automate Integrate

LOHP Staff Roster ☆

Complete Roster

LOHP	Name	Job Title	E-Mail	Position Category	Status ↑	Primary Contact?	Comments	+ Add column
Alameda	Kiet Banh	Program Financial Specialist	Kiet.Banh@acgov.org	Budget/Fiscal Staff	Active			
Alameda	Arash Aslami	Senior Program Specialist	arash.aslami@acgov.org	Project Lead	Active			
Alameda	Nandita Yasmin	Program Specialist	Nandita.Yasmin@acgov.org	Other Program Staff	Active	Yes		
Alameda	Jenny Wang	Division Director	Jenny.Wang@acgov.org	County Executive	Active			
Amador	Anna Shrode	Project Coordinator	ashrode@amadorcounty	Project Lead	Active			

Frequently Asked Questions



The screenshot shows a SharePoint site for the "Local Oral Health Programs" under the "Office of Oral Health" (CDPH). The site has a search bar, navigation menu, and a "FAQ" link highlighted in a red box. Below the navigation is a banner with question marks in speech bubbles. The main content area is titled "Frequently Asked Questions (FAQ)" and contains the following text:

1. How is the SharePoint site different from the COHTAC website?

The SharePoint site differs from the COHTAC website in the following ways:

- The SharePoint site is managed by the Office of Oral Health (OOH), whereas the COHTAC website is managed by the UCSF team.
- The SharePoint site provides a platform for LOHPs to submit progress reports, program deliverables, invoices, budget revisions, and other

www.cdph.ca.gov

Submitting a Document

Accessing the Document Submission Library



CDPH Microsoft 365 Search this library

CDPH Local Oral Health Programs Office of Oral Health

Home Document Submission SharePoint Tutorials Due Dates LOHP Staff Roster ▾ FAQ Recycle bin

Document Submission ▾ Edit in grid view Export to Excel Automate ▾ ⋮

All Documents No folders





W X P

Name ▾	LOHP ▾	Grant Manager ▾	Program Con... ▾	Document Ty... ▾	Budget Year ▾	Approval Stat... ▾	Submis
Calaveras	Calaveras	David.James@cdph...	Pang.Vang@cdph.c...				11/3/20



Document Submission Library: Structure

The screenshot shows a web interface for a document submission library. At the top, it displays the breadcrumb "Document Submission > Calaveras" with a dropdown arrow. To the right are "Share" and "Copy link" options. Below this is a navigation bar with three buttons: "All Documents" (highlighted with a blue border), "No folders", and "Add view". To the right of these buttons are icons for Microsoft Word, Excel, PowerPoint, and a document icon. Below the navigation bar is a table with columns: "Name" (with a document icon and a dropdown arrow), "LOHP" (with a dropdown arrow), "Grant Manager" (with a dropdown arrow), and "Program Con..." (with a dropdown arrow). The table contains three rows, each representing a folder: "Budgets and Invoices", "Progress Reports", and "Work Plan Deliverables".

 Name ▼	LOHP ▼	Grant Manager ▼	Program Con... ▼
 Budgets and Invoices			
 Progress Reports			
 Work Plan Deliverables			

Document Submission Library: Structure

- **LOHP**
 - **Budgets and Invoices**
 - *Approved* (subfolder)
 - **Progress Reports**
 - *Progress Report (Excel File)*
 - *Approved* (subfolder)
 - *Summary Narrative*
 - *Supporting Documents*
 - PR 07 (July–Dec 2025)
 - PR 08 (Jan–June 2026)
 - PR 09 (July–Dec 2026)
 - PR 10 (Jan–June 2027)
 - *PR Review Letters*
 - **Work Plan Deliverables**

Document Submission Library: Structure

Document Submission > Calaveras > Progress Reports ▾

Share Copy link Add shortcut to OneDrive Forms Download

All Documents No folders Add view






Word Excel PowerPoint PDF

Name ▾	LOHP ▾	Grant Manager ▾	Program Con... ▾	Document Ty... ▾	Budget Year ▾	Approval Stat... ▾
1 Progress Report (Excel File)						
2 Summary Narrative						
3 Supporting Documents						
4 PR Review Letters						

Document Submission Library: Structure

Document Submission > Calaveras > Progress Reports > 3 Supporting Documents ▾ Share Copy link Add shortcuts

All Documents No folders + Add view | ☰ W X P PDF

 Name ▾	LOHP ▾	Grant Manager ▾	Program Con... ▾	Document Ty... ▾	Budget Year ▾	Approval Stat... ▾
 PR 07 (July - Dec 2025)						
 PR 08 (Jan - June 2026)						
 PR 09 (July - Dec 2026)						
 PR 10 (Jan - June 2027)						

Submitting a Document

1. Ensure document naming convention used
2. Go to your LOHP folder
3. Select the correct document category folder
4. Upload your document(s)
5. Update the column data
6. Receive automated notification confirming submission (for specific document types)

Document Naming Convention

The different types of documents that you will be submitting should be named using the following format:

- Invoices: Q(1, 2, 3, or 4) Invoice_Year (1, 2, 3, 4, or 5)_LOHP name
- Budget revisions: Revised Budget_Year (1, 2, 3, 4, or 5)_Type (mid-year, annual, or miscellaneous)_LOHP Name
- Work Plan deliverables: Deliverable #_Deliverable name (abbreviated) _LOHP name
- Progress reports: LOHP name PR (1-10)
- Supporting documents: Activity #_Attachment name_LOHP name

Uploading a Document



Document Submission > Calaveras > Budgets and Invoices

Share Copy link Add shortcut to OneDrive Forms Download Edit in grid view Export to Excel **+ Create or upload**

All Documents No folders Add view

Name	LOHP	Grant Manager	Program Con...	Document Ty...	Budget Year	Approval Stat...	Submission D...	Send Back Da...	Resubmit Date	Approval
Approved										12/14/2023 3:24 PM

- Folder
- Files upload**
- Folder upload
- Document

Document Submission > Calaveras > Budgets and Invoices

All Documents No folders Add view

Name	LOHP	Grant Manager
Approved		

Rev + Copy
budget_year
4_mid-year_C
alaveras

There are two (2) ways to upload documents to SharePoint.

Note: Do not compress/zip files when uploading.

Update the column data

Document Submission > Calaveras > Budgets and Invoices ▾

Share Copy link Add shortcut

Unsaved changes

All Documents No folders Add view

Word Excel PowerPoint

Name ▾	LOHP ▾	Grant Manager ▾	Program Con... ▾	Document Ty... ▾	Budget Year ▾
Approved					
Revised budget_Year 4_mid-year_Calaveras...	Calaveras	David.James@cdph.ca...	Pang.Vang@cdph.c...	Type to filter	

- Invoice (Q1)
- Invoice (Q2)
- Invoice (Q3)
- Invoice (Q4)
- Budget Revision (mid-year)
- Budget Revision (annual)
- Budget Revision (miscellaneous)

Update the column data

Document Submission > Calaveras > Budgets and Invoices

Share Copy link Delete Pin to top Favorite Add shortcut to OneDrive Forms Download Move to Copy to Edit in grid



Name	LOHP	Grant Manager	Program Con...	Document Ty...	Budget Year	Approval Stat...
Approved						
Revised budget_Year 4_mid-year_Calaveras...	Calaveras	David.James@cdph.ca...	Pang.Vang@cdph.c...		Type to filter 2022-2023 2023-2024 2024-2025 2025-2026 2026-2027	ding Review

Automated Notification

The screenshot shows an Outlook window titled "SharePoint Submission Received - Message (HTML)". The ribbon includes "File", "Message", "Help", "Acrobat", and "Tell me what you want to do". The "Message" ribbon is active, showing various actions like "Delete", "Archive", "Reply", "Reply All", "Forward", "Share to Teams", "All Apps", "Quick Steps", "Move", "Tags", "Editing", "Immersive", "Translate", "Zoom", "Reply with Scheduling Poll", "Report Phish", and "Viva Insights".

The email content is as follows:

SharePoint Submission Received

 CDPH Office of Oral Health
To:  Sundhararajan, Vyshiali@CDPH

Hello Berkeley LOHP,

Thank you for submitting Test doc.docx. You will receive an update once it has been reviewed by your grant manager (David.James@cdph.ca.gov) and/or program consultant (Deepak.Shrestha@cdph.ca.gov).

Please note, this is an automated message.

Best regards,

Office of Oral Health
Center for Healthy Communities
California Department of Public Health

Summary button: Summarize

Reply actions: Reply, Reply All, Forward, and a more options menu.

Timestamp: Tue 12/9/2025 1:40 PM

LOHP Staff Changes

When to Inform OOH

- New hire
- Staff departure
- Staff role change
- Temporary coverage adjustments

Steps to Inform OOH

- Hover over the LOHP Staff Roster in the main menu
- Click on the Staff Update Form from the dropdown menu
- Complete the Staff Update Form
- SharePoint will notify the OOH Program Consultant
- OOH Program Consultant updates the LOHP Staff Roster

Navigating to the Staff Update Form



Microsoft 365

Search this site



Local Oral Health Programs

Restricted

Share



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[Document Submission](#)

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[FAQ](#)



Staff Update Form

This site is designed to simplify document submissions by LOHPs to the Office of Oral Health (OOH). Prior to this site, invoices, budget revisions, progress reports, and Work Plan deliverables were emailed to OOH grant managers and program consultants. Those days are over, now that we have this SharePoint site!

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To learn more about this SharePoint site and how to submit documents, visit the SharePoint Tutorials Library, which you can access from the main menu.

Once you are ready to submit a document for review, go to the Document Submission Library by clicking your LOHP name on the map below.

CALIFORNIA



Completing the Staff Update Form

LOHP Staff Update Form

Complete this form when there are any staffing changes at your LOHP, including when staff leaves or joins your LOHP. This will allow OOH to keep an up-to-date email list and ensure that all active LOHP staff are receiving required correspondence and inactive staff are removed from correspondence.

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

* Required

1. What is the name of your LOHP? *

Select your answer

2. Select your current program consultant's email address. *

Select your answer

3. Have any staff left your LOHP? *

Yes

No

Editing a Document

When to edit a document in SharePoint?

- When OOH requests edits or additional information for any submitted documents prior to approval
- Note: There is a separate process for PDF files

Steps to Edit a Document

- Locate the submitted document
- Open the document from SharePoint
- Update the document and add/respond to comments if needed
- Email and notify your LOHP's grant manager and program consultant

Replacing a Document

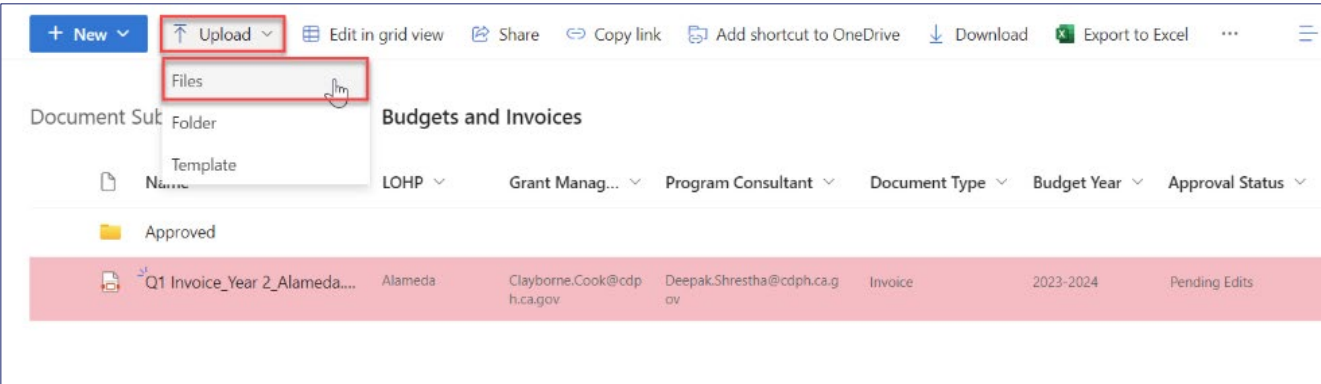
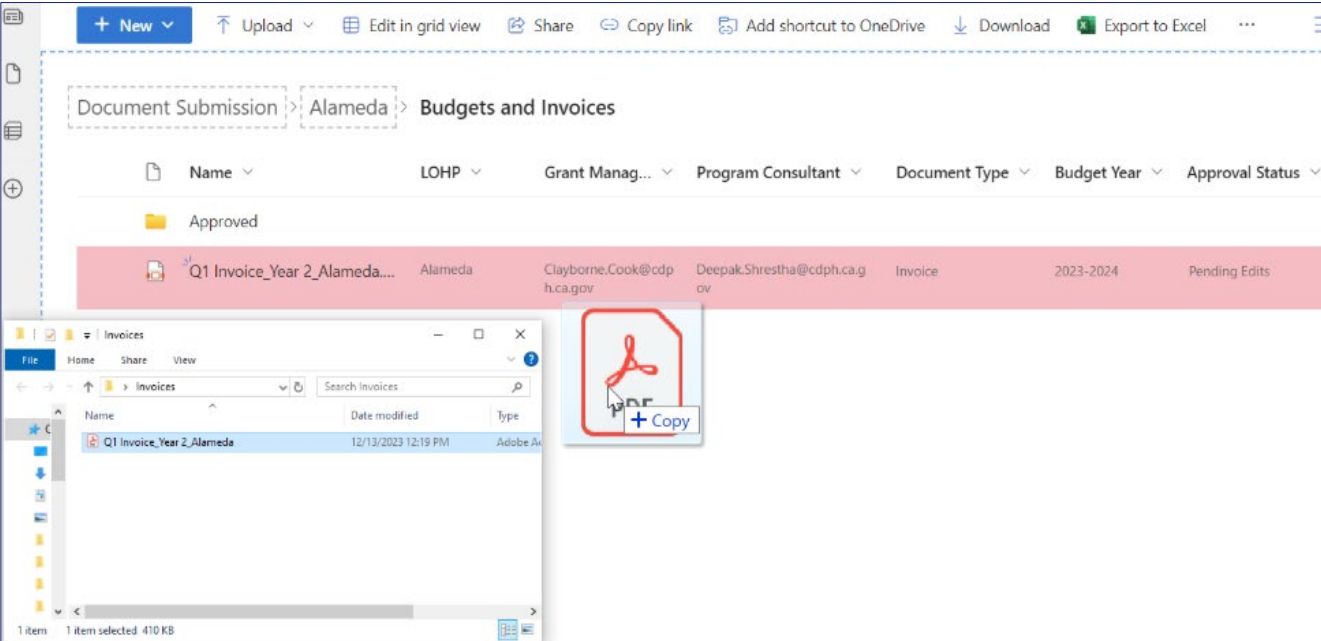
When to Replace a Document in SharePoint?

- When OOH requests edits and/or additional information for a submitted PDF document (e.g., invoice)

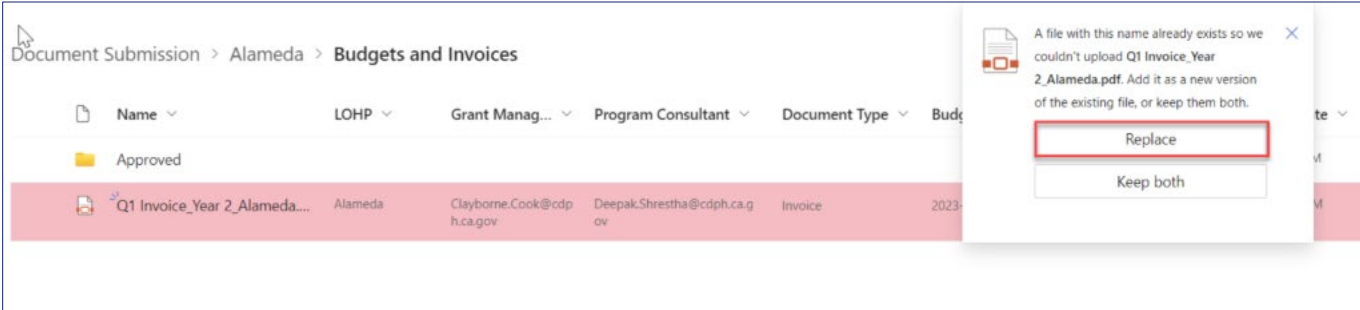
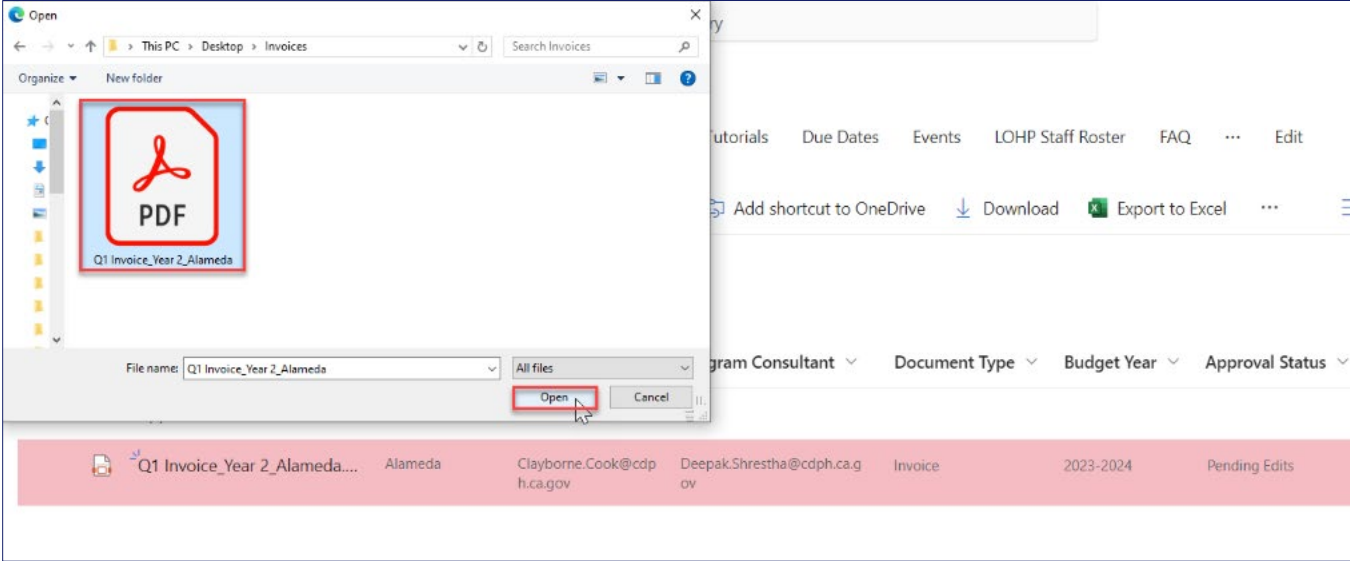
Steps for Replacing a Document

- Locate the submitted PDF file
- Download (if needed) and make requested edits
- Upload the file to the same folder with the same file name
- Select “Replace” to replace the previous version
- SharePoint automatically overwrites the old version
- Email and notify your LOHP’s grant manager and program consultant that the document has been resubmitted

Replacing a Submitted PDF Document



Replacing a Submitted PDF Document



**Downloading
approved documents**

Why download approved documents?

- For county records
- To share with partners
- For future reference
- To ensure you are using OOH-approved versions

Steps for downloading an approved document

- Go to the “Approved” or “PR Review Letters” folder
- Right click on file
- Click “Download” from menu
- Save file from downloads

Next Steps

- Explore and get better familiarized with the SharePoint site and its various components
- Review the SharePoint tutorials
- Review and share the training recording and materials once available
- Inform OOH about any other LOHP team member that should have access
- Submit your mid-year budget revisions due by April 30, 2026
- Reach out with any questions you have for OOH

Questions?



