

# ***Quick list of naming conventions for files***

For quick reference – see complete description of how to upload in following pages.

District Board Meeting – Approved Minutes - **yyyy\_mm\_districtname\_minutes**

Annual Report - **yy-yy\_districtname\_annualreport**

Supervisor Disclosure Forms (one file per supervisor, annually) - **yyyy\_supervisorlastname\_SDF**

Secondary Employment Certification Form – District Staff (one file per employee, annually) -  
**yyyy\_districtemployeelastname\_SECF**

Term of Office Paperwork (oath & employment certification, one file per supervisor, at the beginning of each term) -  
**termfirstyyyy\_supervisorlastname\_TOO**

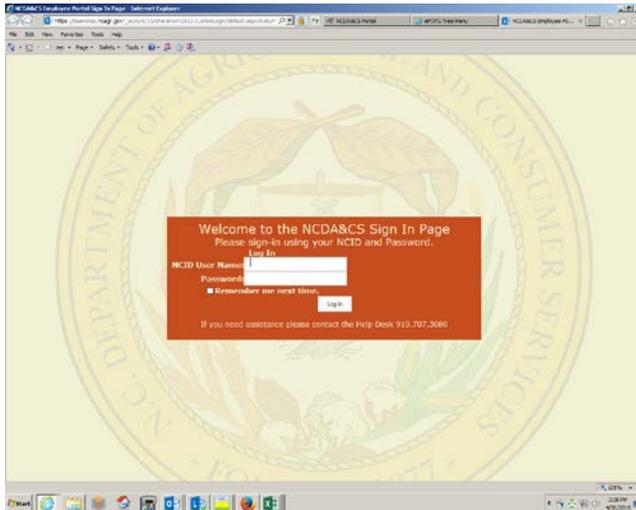
Election Report (one file to include all reports, even years) – **yyyy\_districtname\_electionreport**

Board Appointment (form, and resignation letter where appropriate) - **yyyy\_individuallastname\_appointment**

# Uploading documents to your district's SharePoint Team Site

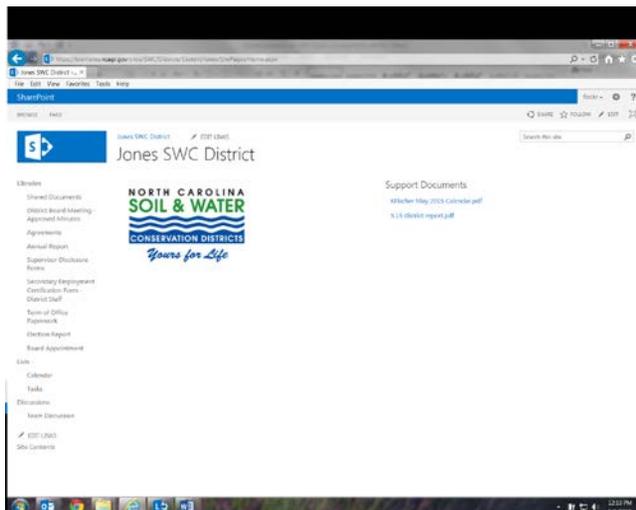
Obtain your district's unique SharePoint website link from your regional coordinator.

Image 1



Enter your NCID Username and Password. Click Log In.  
After you login, you will see the screen below.

Image 2



This is your district's individual page – only those who have been granted access will be able to visit.  
You are encouraged to **bookmark this page!**  
Note the “Support Documents” on the right, where division staff can place materials for easy access.

## DISTRICT BOARD MEETING APPROVED MINUTES

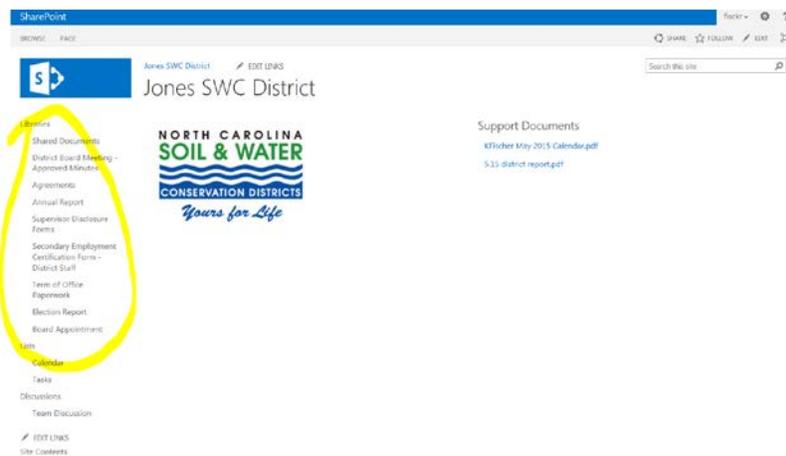
The master contract between your district and the division requires *approved board meeting minutes* to be submitted for the central office files.

\*Please note that what you save in the SharePoint system are copies of your local district files. Districts are required to maintain original board meeting minutes in accordance with your document retention schedule. The intent of the SharePoint system is to provide an efficient way for you to submit material to the division, but **DO NOT RELY** on this system as a means to maintain your district files. Division staff will archive / delete materials periodically. Please make sure your district maintains your local records as required.

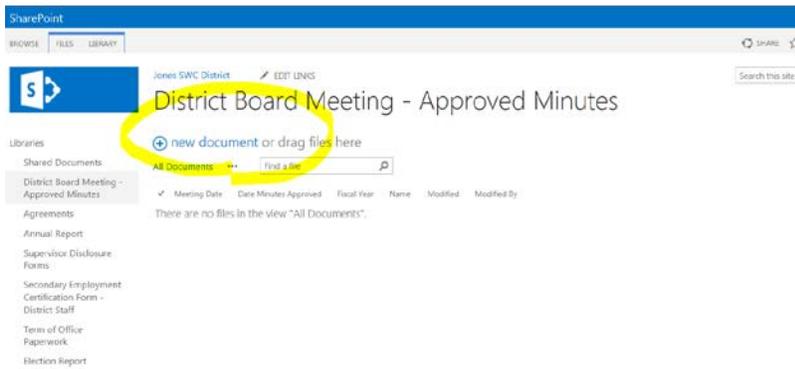
\*\*Best practices for approving board meeting minutes – district administrator prepares draft minutes following a board meeting; draft minutes are circulated to district supervisors prior to the next board meeting; at the next meeting, supervisors review and approve (or revise as needed) board meeting minutes; approved minutes should be signed by the supervisor serving in the Secretary position, or by the Chair. Each district should have an agreed upon process to “finalize” minutes, but it is suggested that the final version be signed, to indicate their validity.

**Scan your approved / signed minutes as a .pdf, and save the file as “yyyy\_mm\_districtname\_minutes”** (example: 2015\_05\_jones\_minutes). If your district has more than one meeting in a particular month, you can add a “2” following the month (example: 2015\_052\_jones\_minutes).

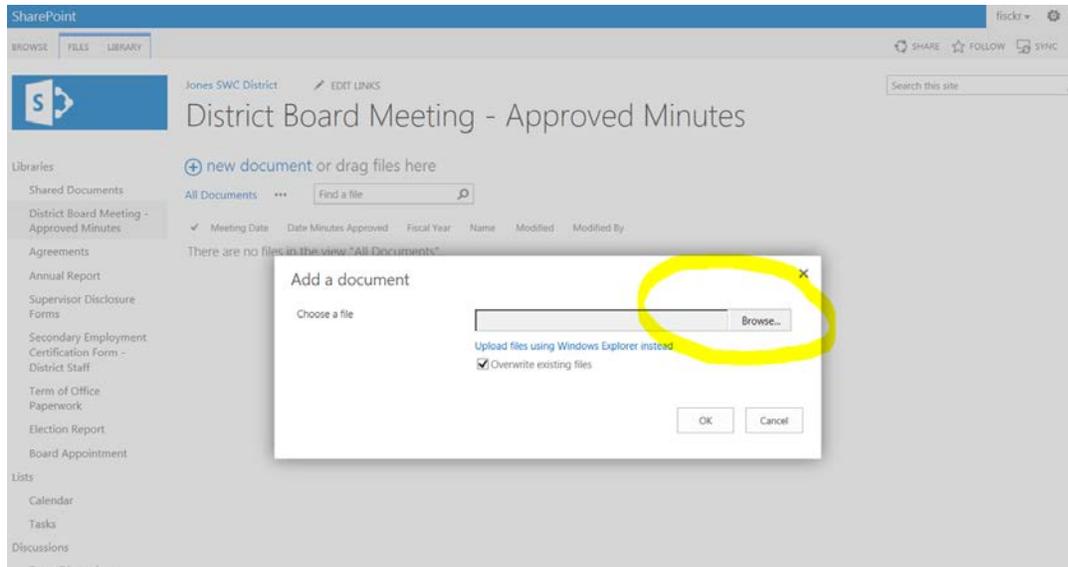
Minutes are required to be uploaded beginning July 2015.



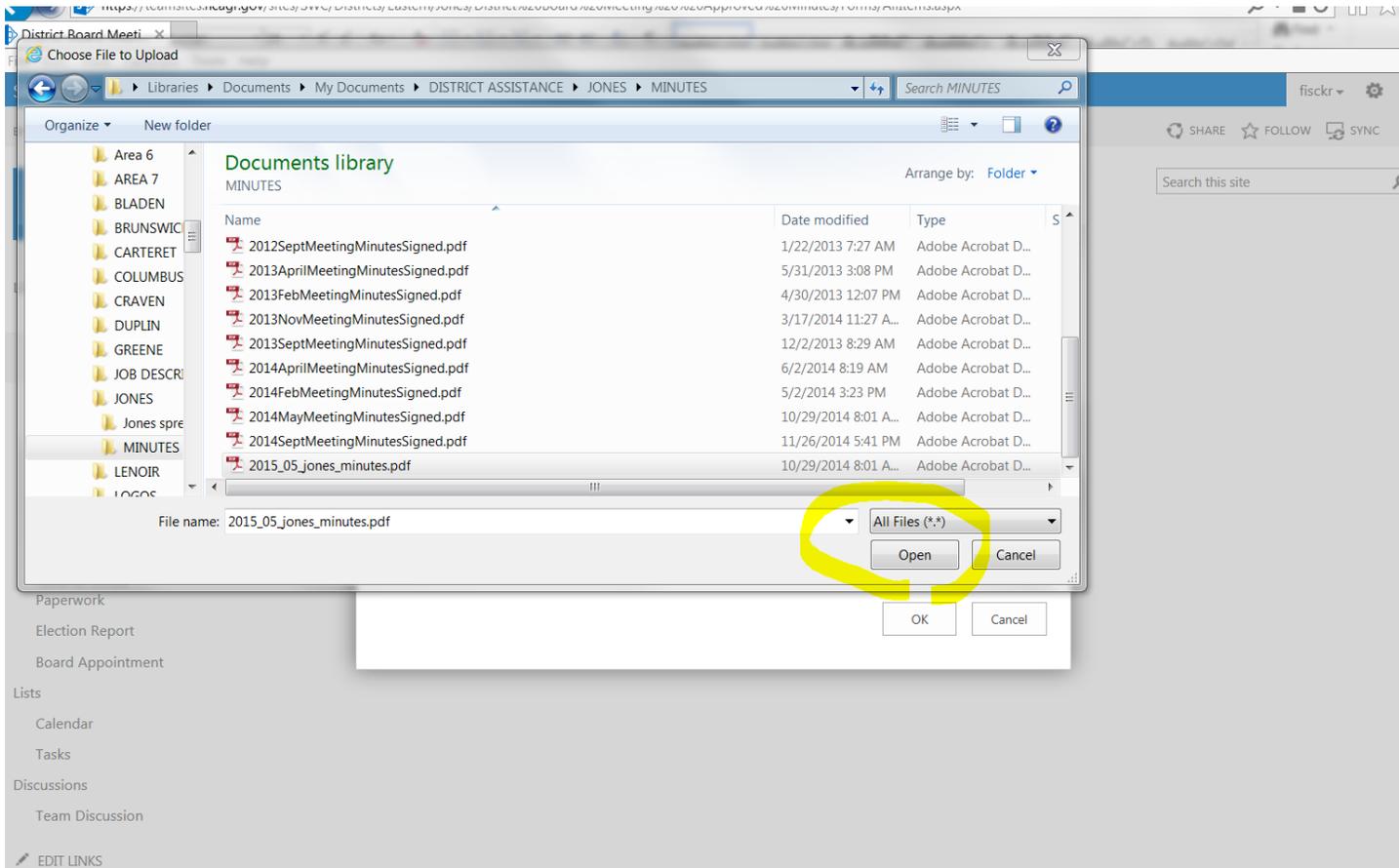
In your “Library” on the left, select District Board Meeting – Approved Minutes.



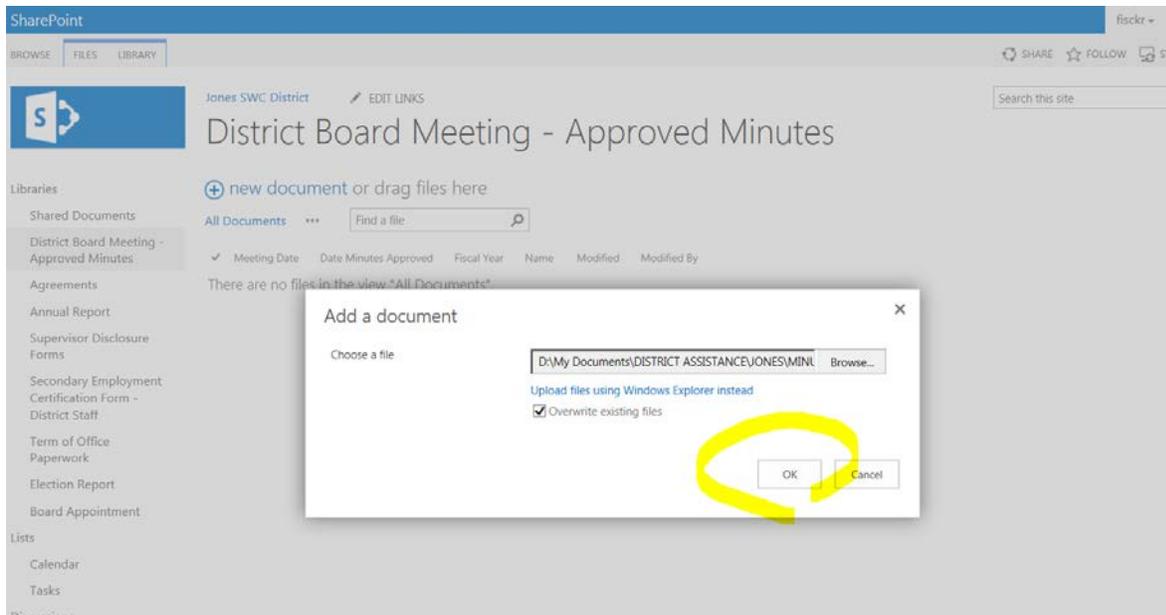
Click “+ new document” to add your scanned .pdf to the page.



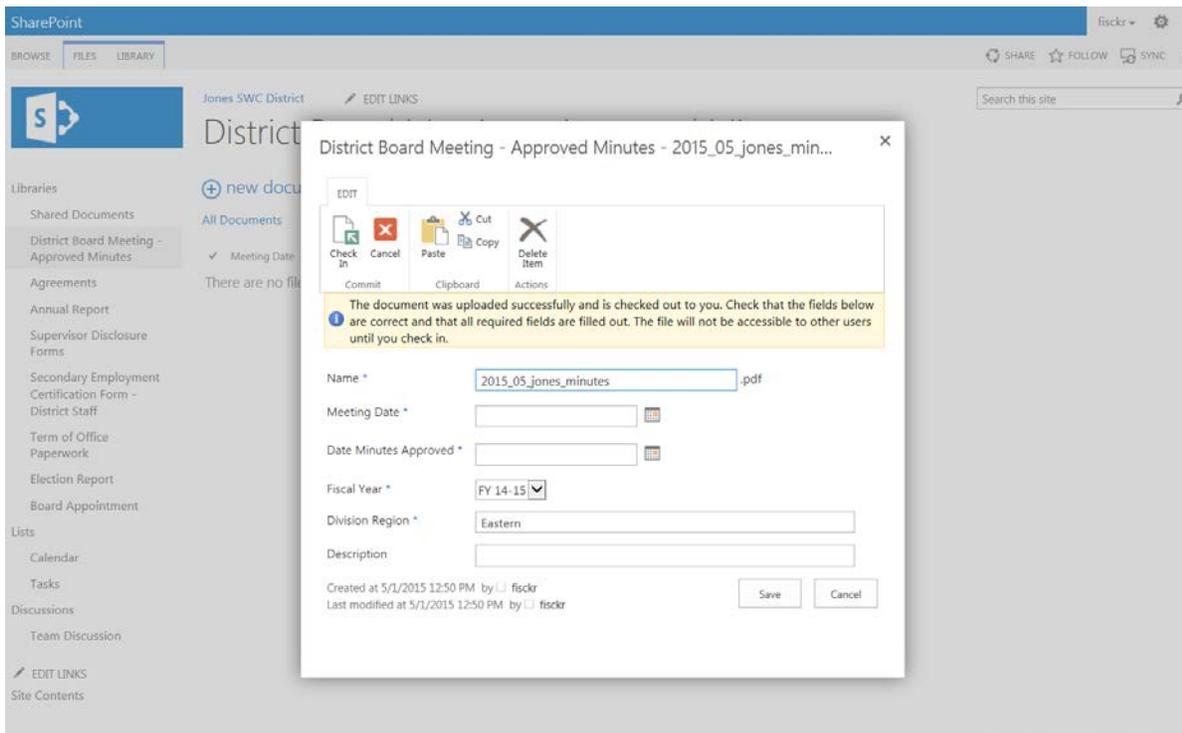
Click “Browse” to navigate to where you saved the document you want to upload.



Click on the document (should be named “yyyy\_mm\_districtname\_minutes”), and then click “Open”.



Then click “OK”.



You will be brought to a screen where you will provide more details re: each set of minutes you upload.

- Input the “Meeting Date” by clicking on the calendar to the right of the line – this should be the actual meeting date
- Input the “Date Minutes Approved” by clicking on the calendar to the right of the line – this should be the date your board approved the minutes (likely the following month)
- Input the Fiscal Year
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Click “Save”

# AGREEMENTS

This library includes your Operational Agreement and your Master Contract with the division (beginning FY 15-16), for easy reference.

SharePoint

BROWSE FILES LIBRARY

SHARE FOLLOW

Jones SWC District EDIT LINKS

Search this site

## Agreements

Libraries

- Shared Documents
- District Board Meeting - Approved Minutes
- Agreements**
- Annual Report
- Supervisor Disclosure Forms
- Secondary Employment Certification Form - District Staff
- Term of Office Paperwork
- Election Report
- Board Appointment

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

+ new document or drag files here

All Documents Division Master Agreements Operational Agreements ... Find a file

Name	Agreement Type	Approval Date (last)	Modified	Modified By
Jones_MOU_2013	Operational Agreement	10/26/2012	A few seconds ago	fiskr

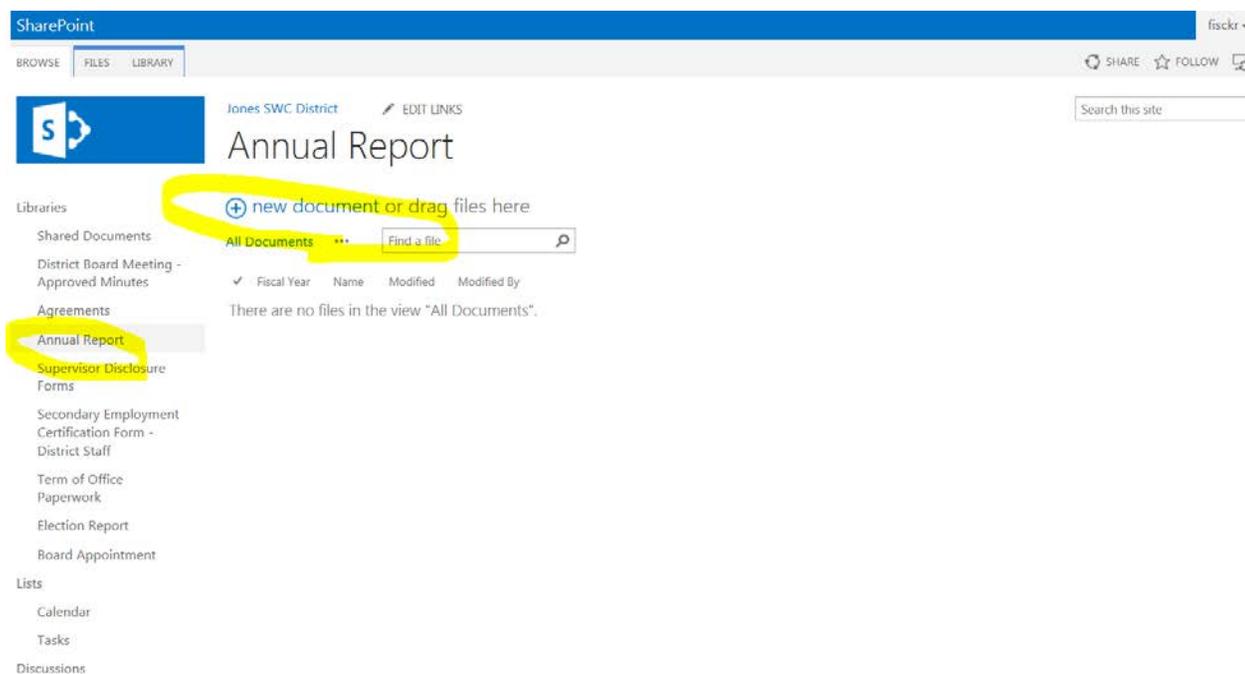
## ANNUAL REPORT

Many districts prepare an Annual Report at the end of the fiscal year to promote the accomplishments of their local program. For many, this is a good practice and helps with marketing and outreach, and summarizes the positive work of the district during the fiscal year. For districts that would like to share their accomplishments with the division, please submit your report through the SharePoint system.

\*Please note that what you save in the SharePoint system are copies of your local district files. Districts are required to maintain original files in accordance with your document retention schedule. The intent of the SharePoint system is to provide an efficient way for you to submit material to the division, but **DO NOT RELY** on this system as a means to maintain your district files. Division staff will archive / delete materials periodically. Please make sure your district maintains your local records as required.

**Scan your annual report as a .pdf, and save the file as “yy-yy\_districtname\_annualreport”** (example: 14-15\_jones\_annualreport).

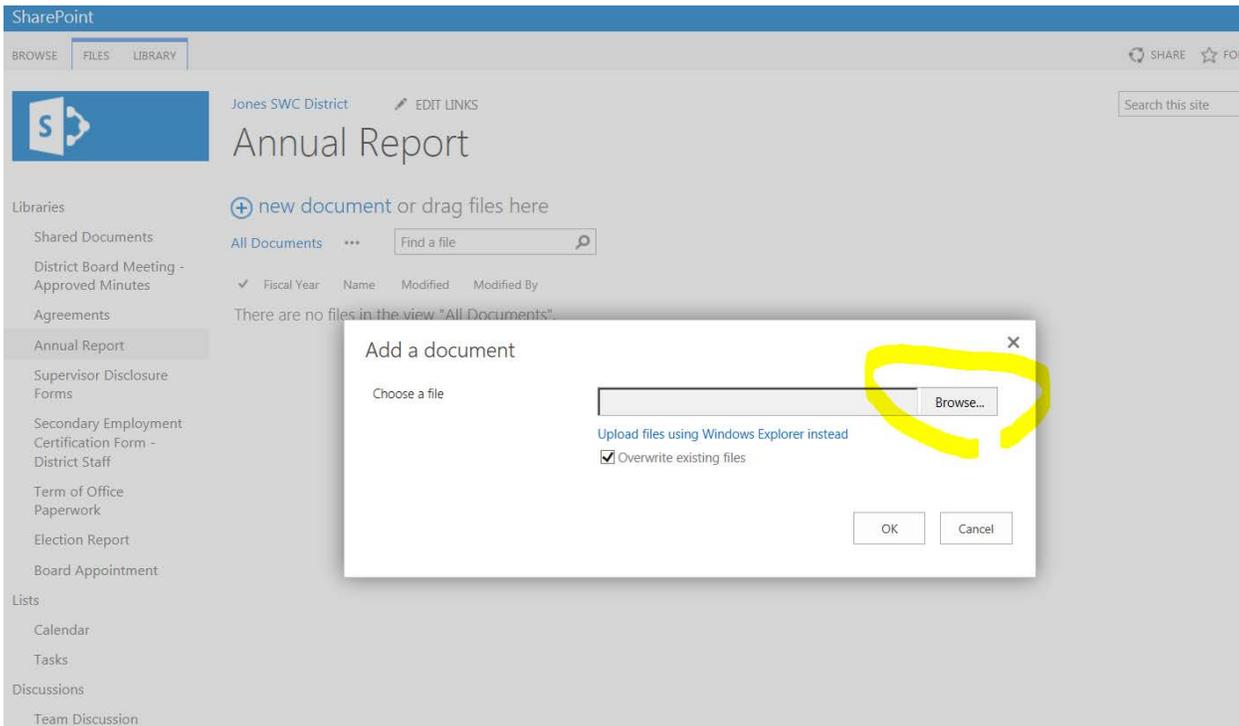
Annual reports are required to be uploaded beginning FY 14-15.



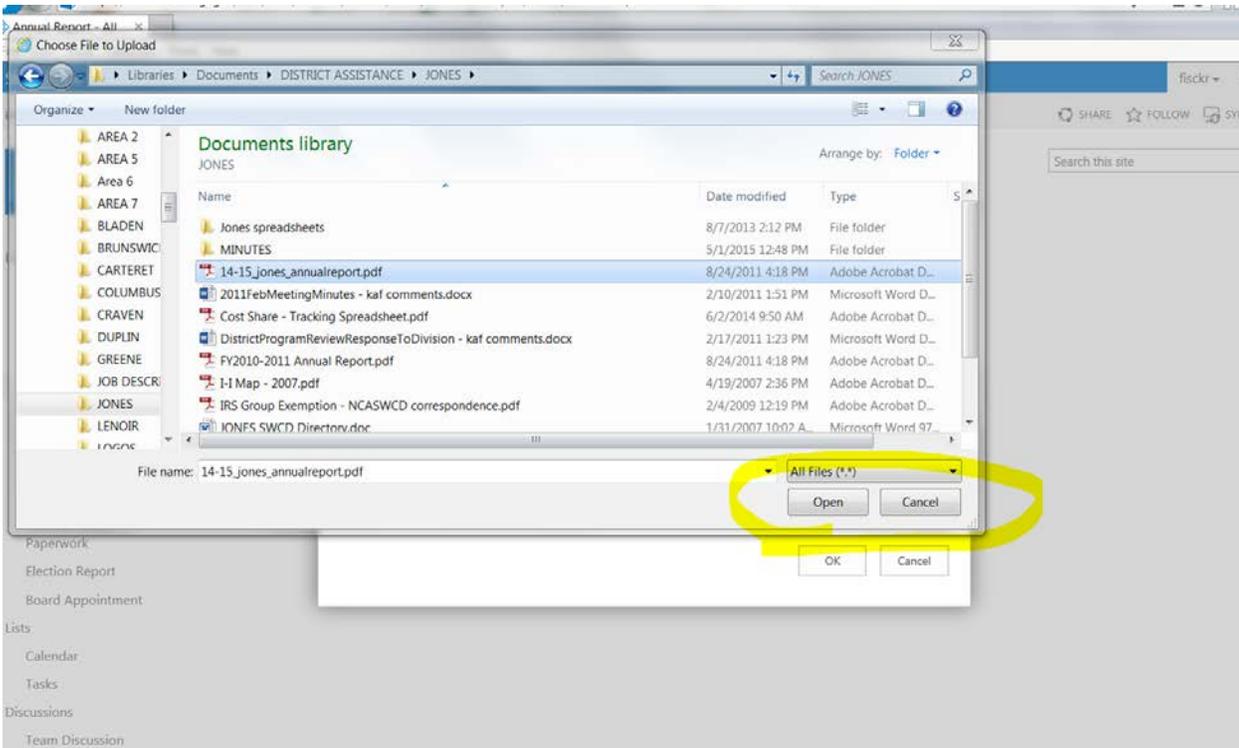
The screenshot shows a SharePoint interface for the 'Jones SWC District'. The top navigation bar includes 'SharePoint', 'BROWSE', 'FILES', 'LIBRARY', and a user profile 'fiskr'. The main header area displays the 'Annual Report' title and a search bar. The left sidebar lists various libraries, with 'Annual Report' highlighted. The main content area features a '+ new document or drag files here' button and a search bar for files. The text 'There are no files in the view "All Documents".' is visible below the search bar.

Click the “Annual Report” library on the left.

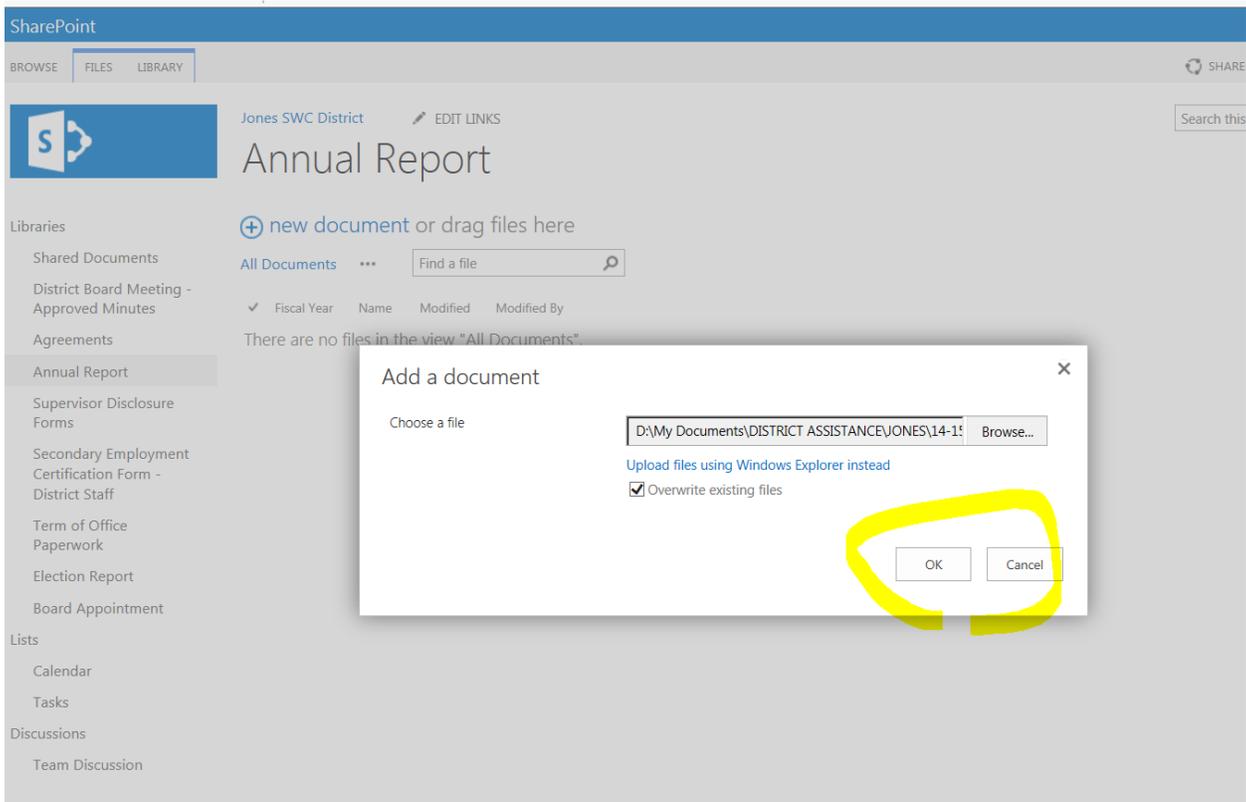
Click “+ new document” to add your scanned .pdf to the page.



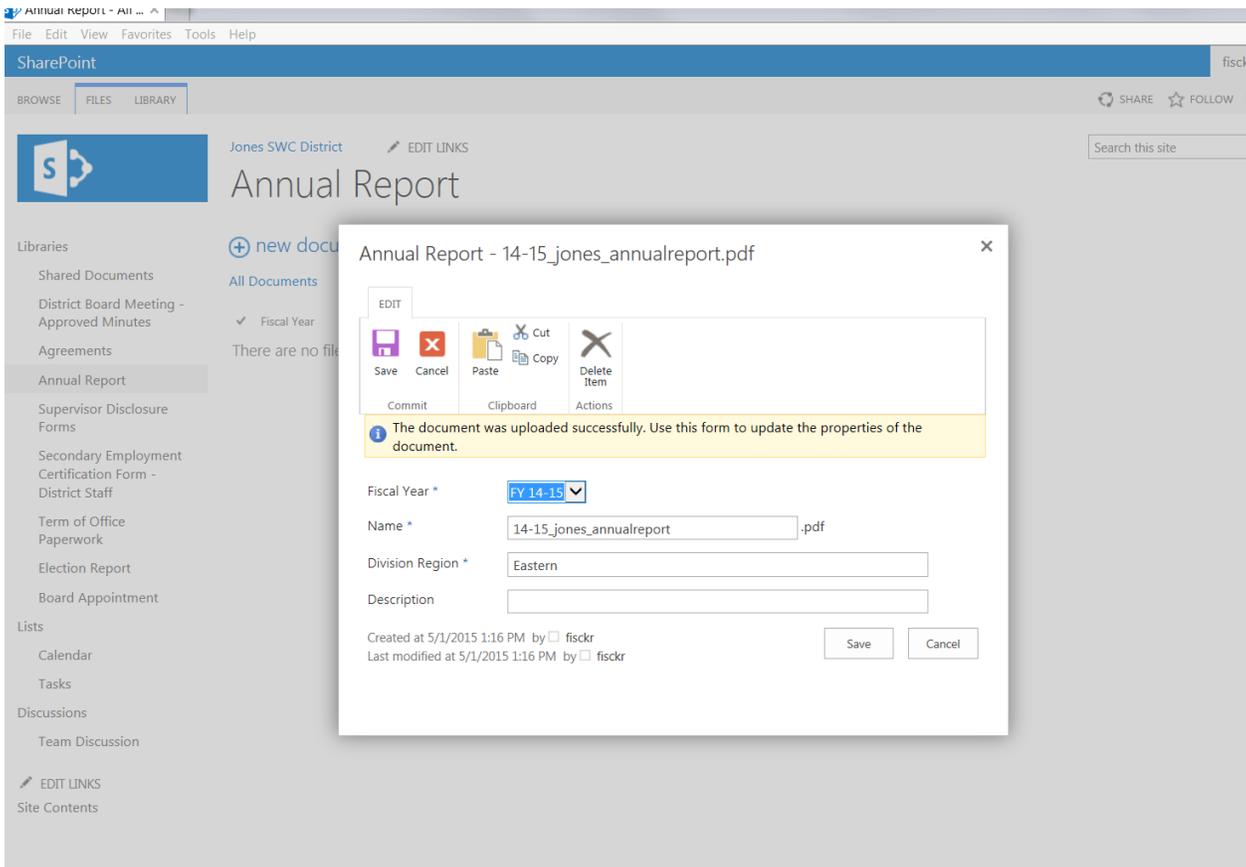
Click "Browse" to navigate to where you saved the document you want to upload.



Click on the document (should be named "**yy-yy\_districtname\_annualreport**"), and then click "Open".



Then click "OK".



You will be brought to a screen where you will provide more details re: your annual report.

- Input the “Fiscal Year” using the drop down menu
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Click “Save”

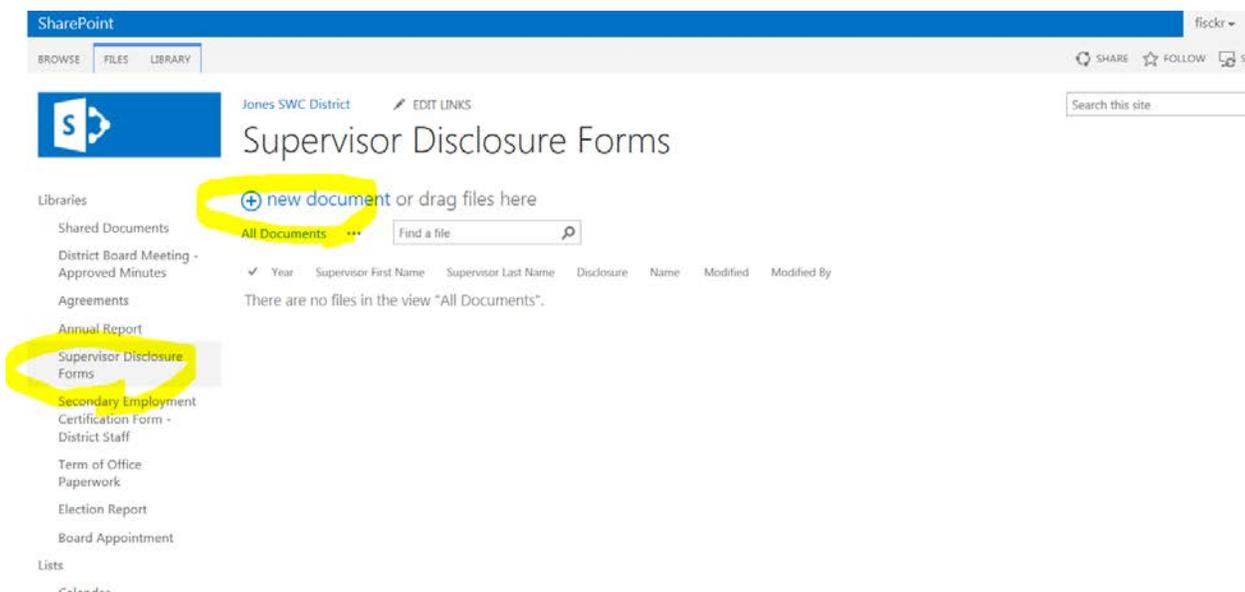
## SUPERVISOR DISCLOSURE FORMS

The commission has adopted a policy to address supervisors' involvement as cost share contractors; the District Supervisor Disclosure Form should be completed before an appointed or elected district supervisor begins responsibilities and it should be updated annually by all district supervisors. The form is available online - <http://ncagr.gov/SWC/districts/forms.html>.

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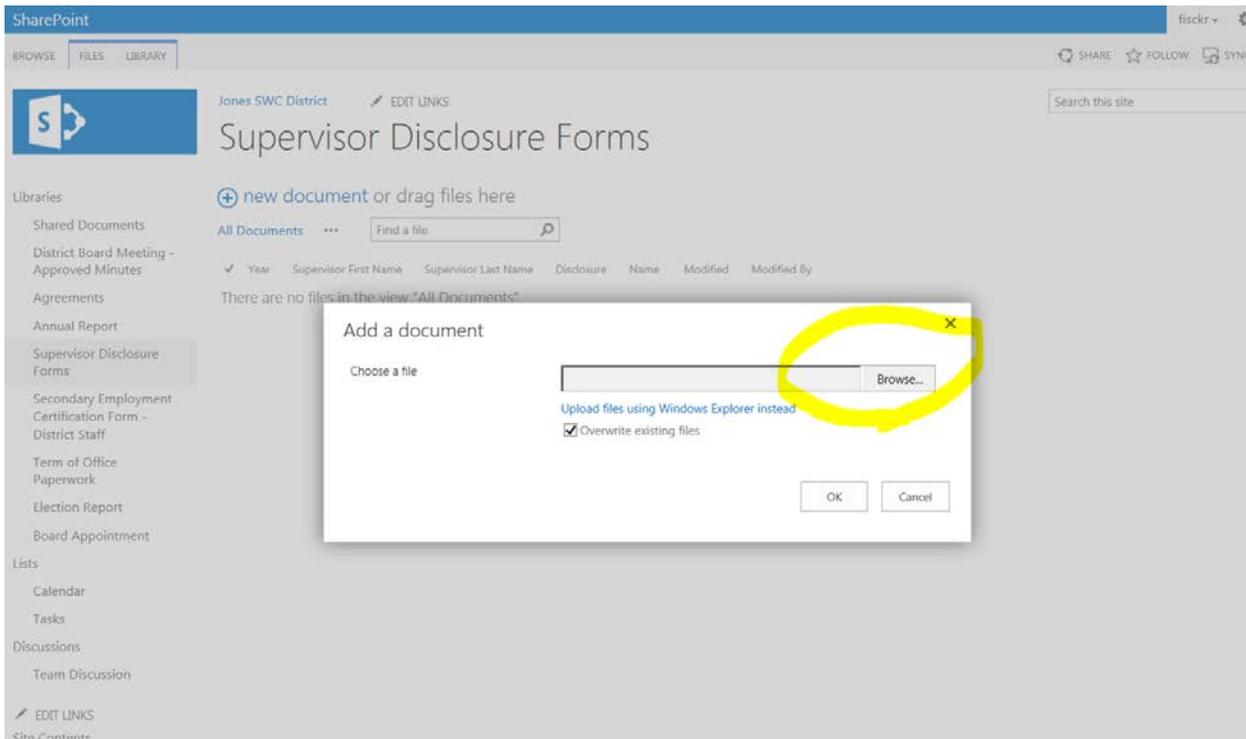
**Scan the supervisor disclosure form for each supervisor individually (n.b. most districts will have 5 files to save in this library each year – one for each supervisor) “yyyy\_supervisorlastname\_SDF” (example: 2015\_jones\_SDF).**

Supervisor disclosure forms are required to be uploaded beginning 2015.

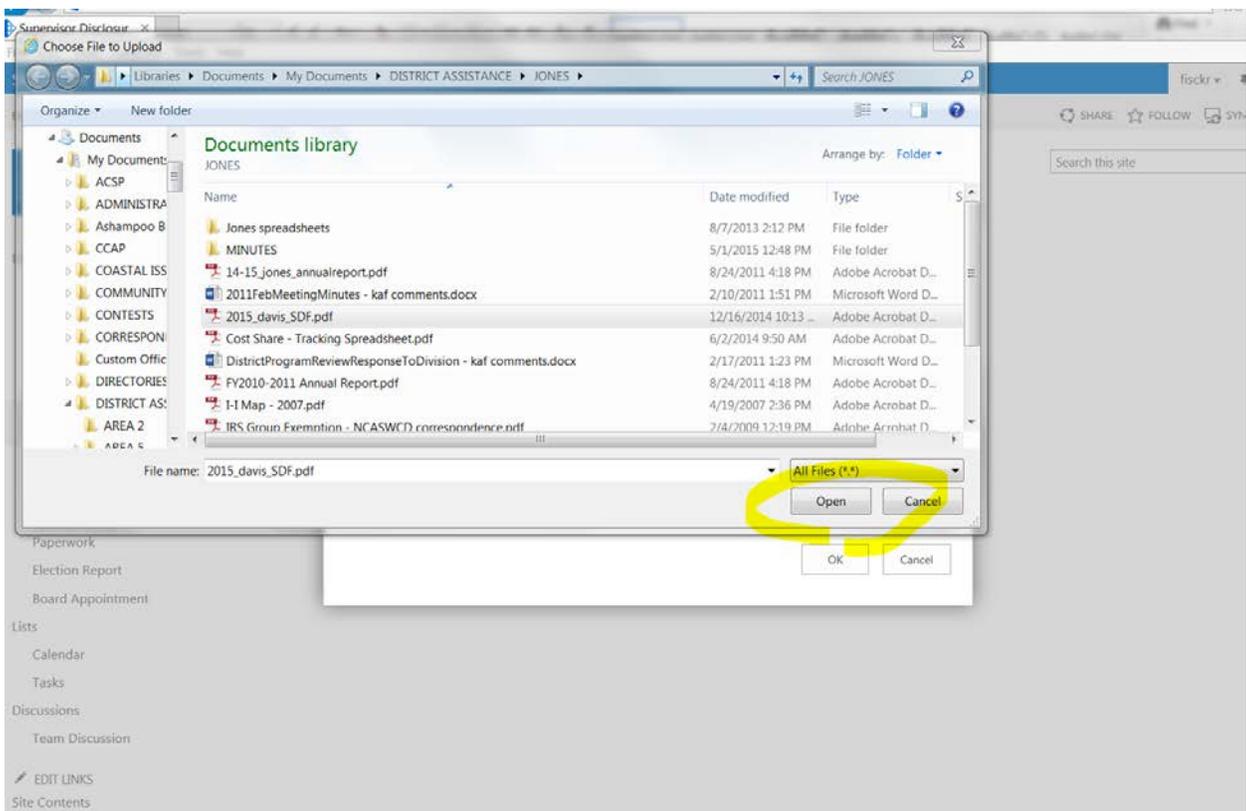


Click the “Supervisor Disclosure Forms” library on the left.

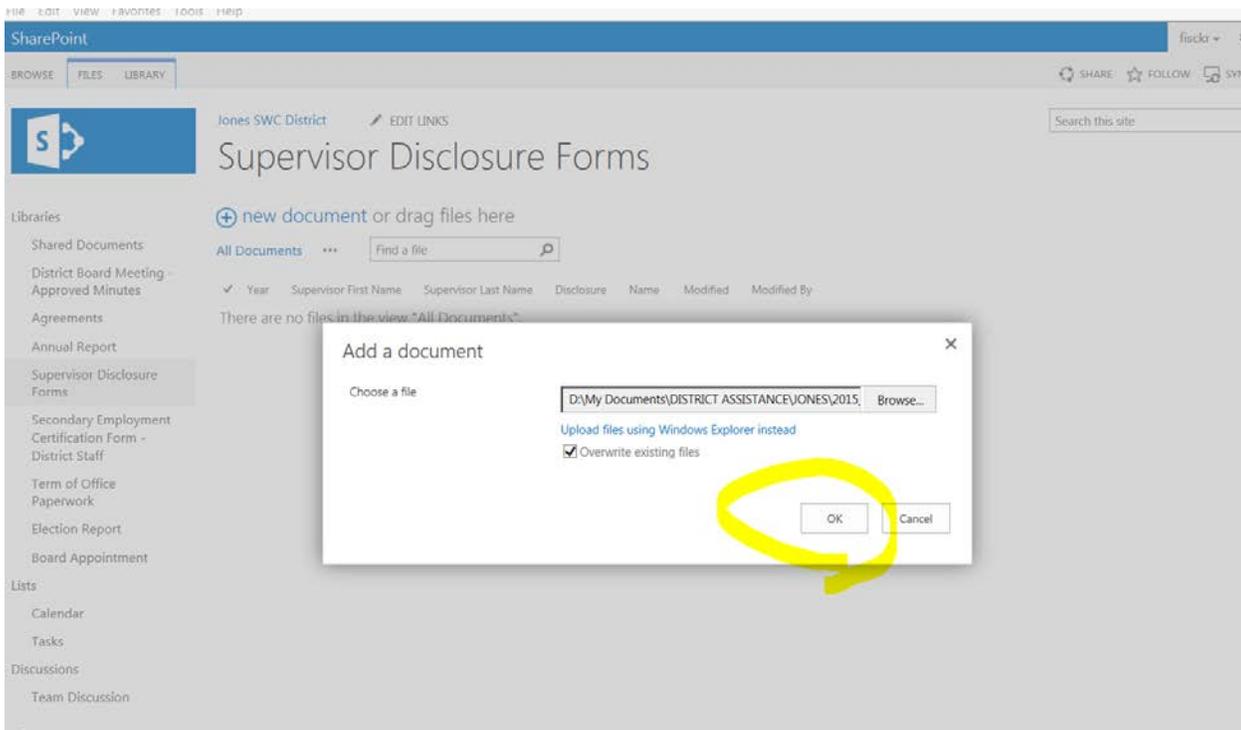
Click “+ new document” to add your scanned .pdf to the page.



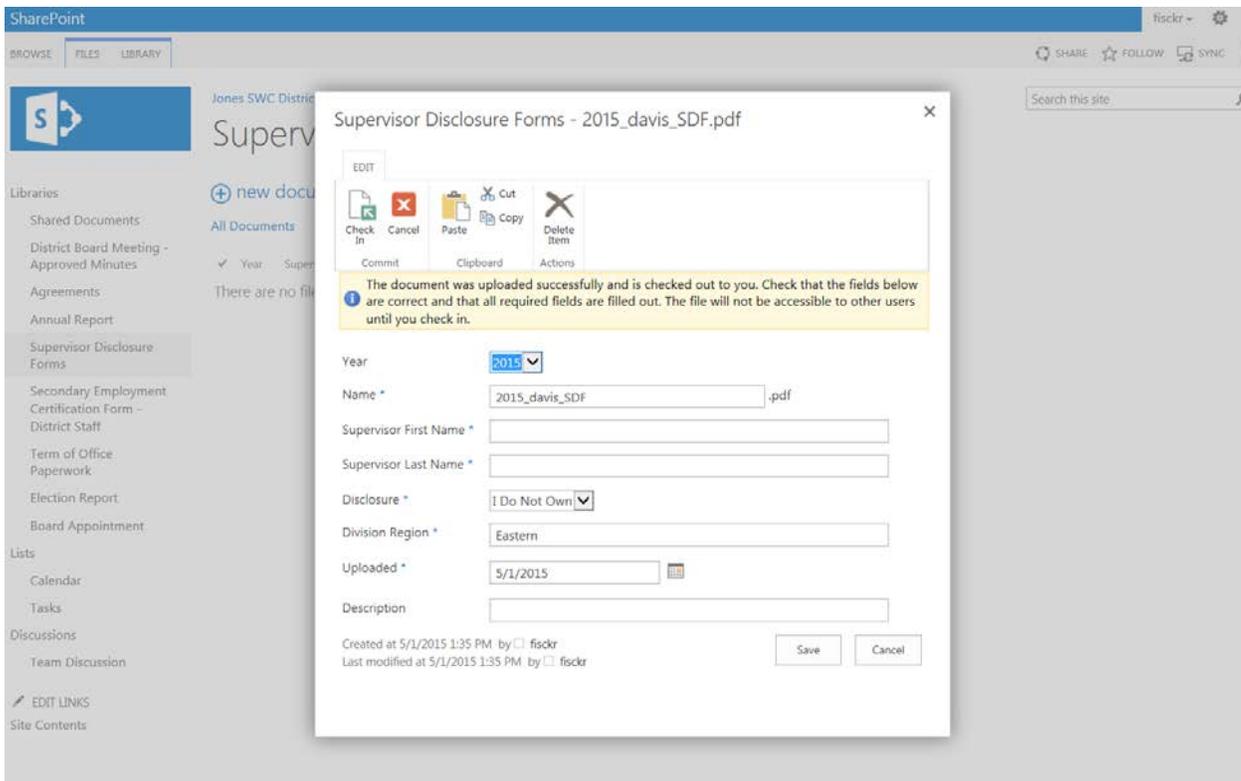
Click "Browse" to navigate to where you saved the document you want to upload.



Click on the document (should be named "yyyy\_supervisorlastname\_SDF"), and then click "Open".



Then click "OK".



You will be brought to a screen where you will provide more details re: this file.

- Input the "Year" using the drop down menu

- Input the “Supervisor First Name”
- Input the “Supervisor Last Name”
- Indicate “Disclosure” using the drop-down menu (I do not own / I own)
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Click “Save”

## SECONDARY EMPLOYMENT CERTIFICATION FORM – DISTRICT STAFF

The master contract between your district and the division requires a *secondary employment certification form* to be submitted annually for all cost-shared positions.

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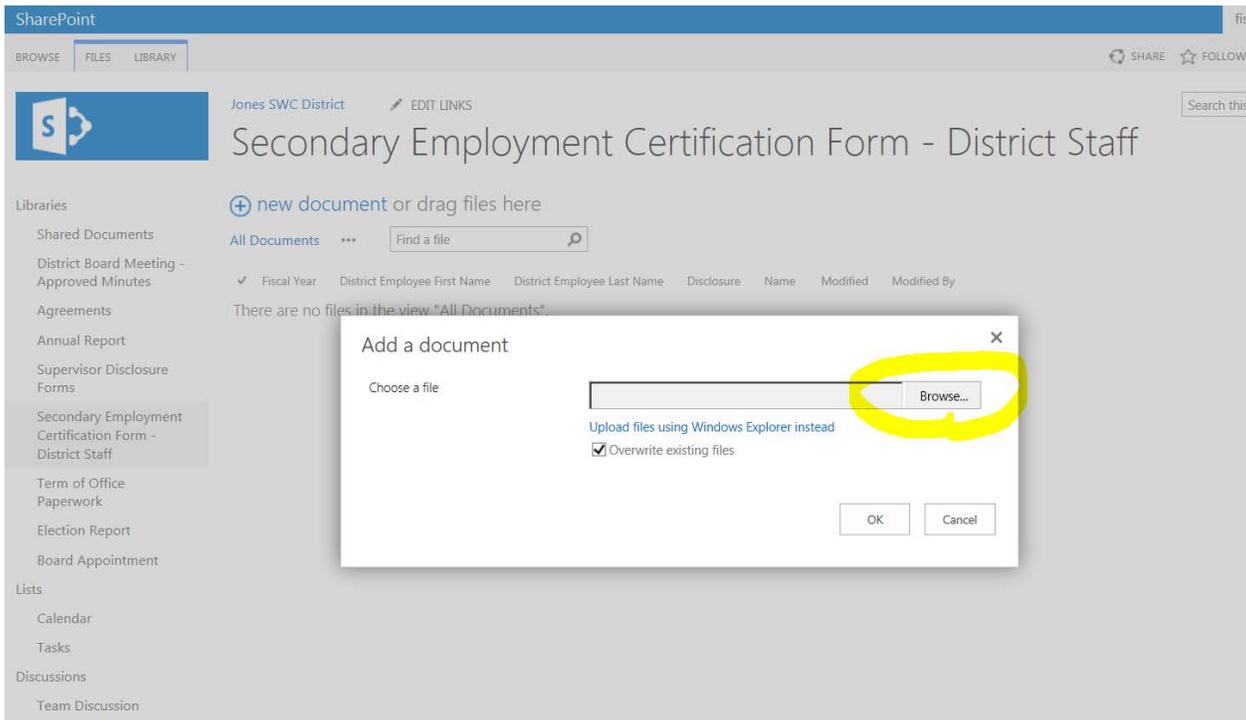
**Scan the secondary employment certification form for each cost-shared employee individually**  
“yyyy\_districtemployeelastname\_SECF” (example: 2015\_jones\_SDF).

Secondary employment certification forms are required to be uploaded beginning FY 14-15. Forms are required to be uploaded by October 15 each year.

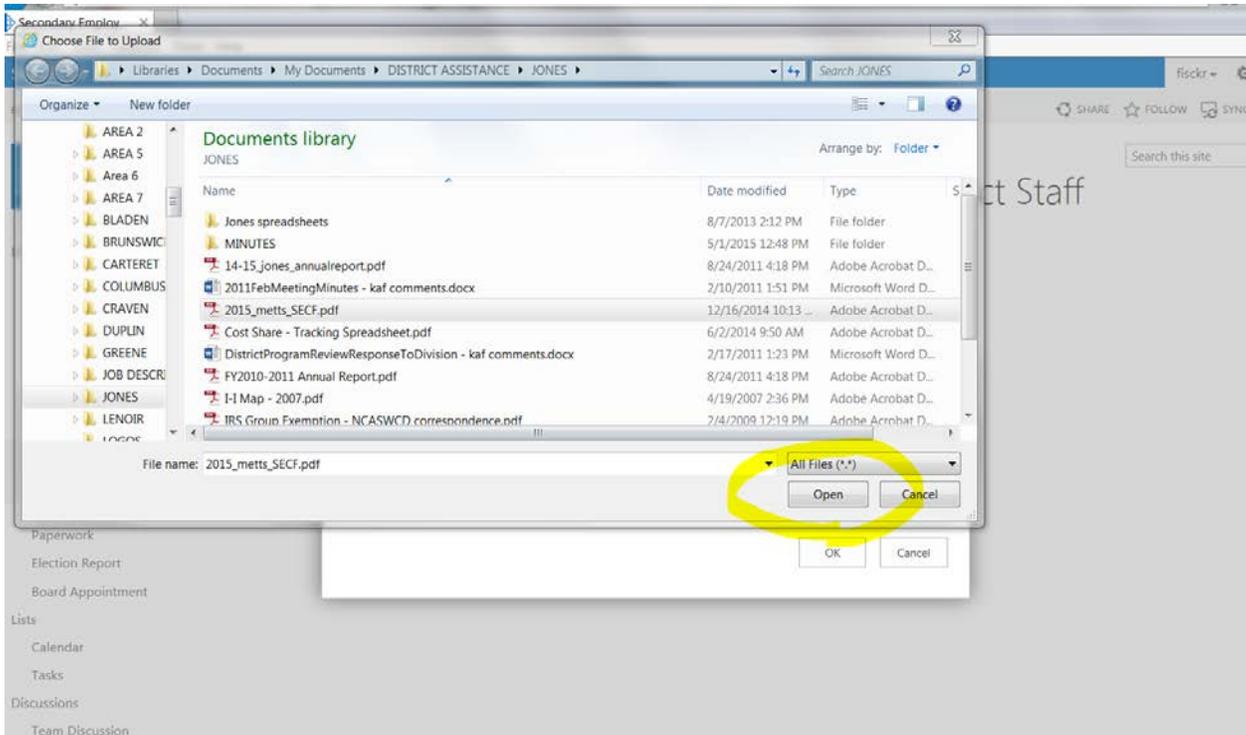
The screenshot shows a SharePoint interface for a library named "Secondary Employment Certification Form - District Staff". At the top, there is a blue header with "SharePoint" and "fisc" on the right. Below the header, there are navigation tabs for "BROWSE", "FILES", and "LIBRARY", along with "SHARE" and "FOLLOW" options. The main content area features a "new document" button circled in yellow, with the text "or drag files here" next to it. Below this, there is a search bar and a table of files. The table has columns for "Fiscal Year", "District Employee First Name", "District Employee Last Name", "Disclosure", "Name", "Modified", and "Modified By". The text "There are no files in the view 'All Documents'." is displayed below the table. On the left side, there is a list of libraries, with "Secondary Employment Certification Form - District Staff" circled in yellow. Other libraries listed include "Shared Documents", "District Board Meeting - Approved Minutes", "Agreements", "Annual Report", "Supervisor Disclosure Forms", "Term of Office Paperwork", "Election Report", and "Board Appointment". At the bottom, there are sections for "Lists" including "Calendar" and "Tasks".

Click the “Secondary Employment Certification Form – District Staff” library on the left.

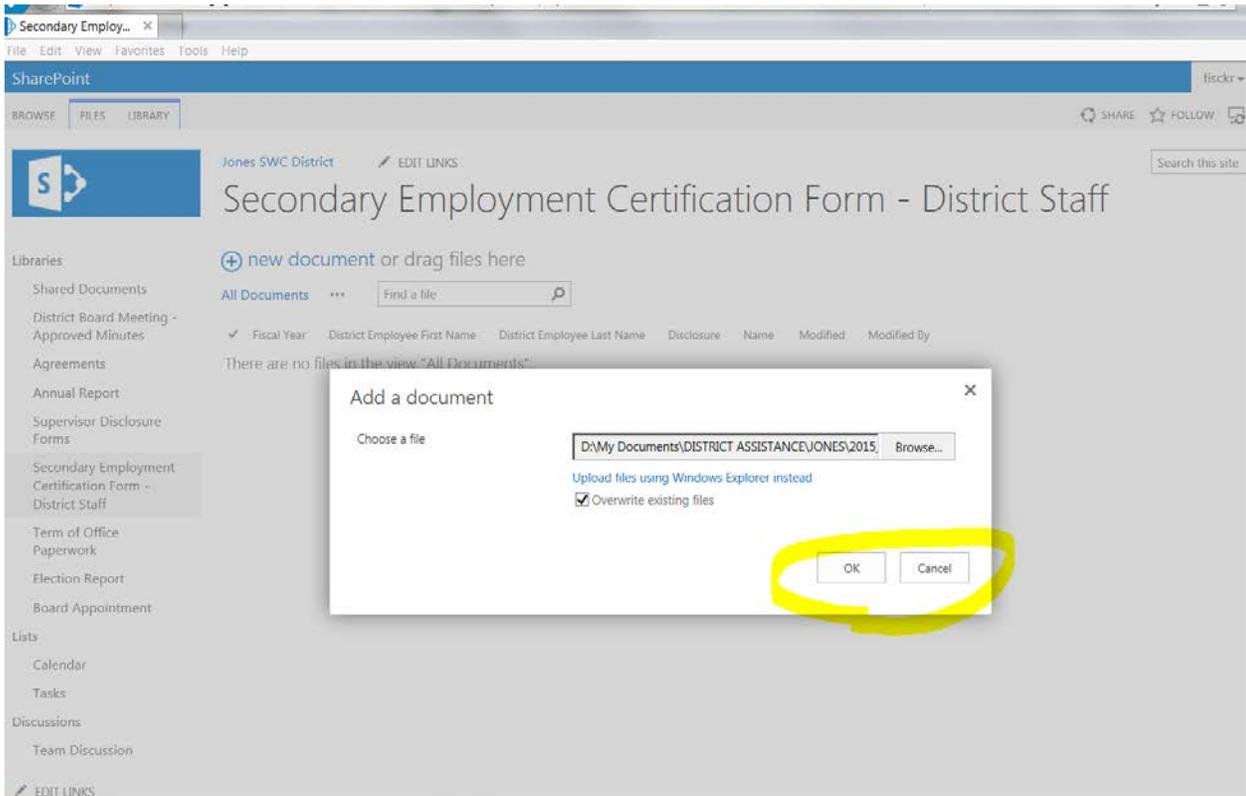
Click “+ new document” to add your scanned .pdf to the page.



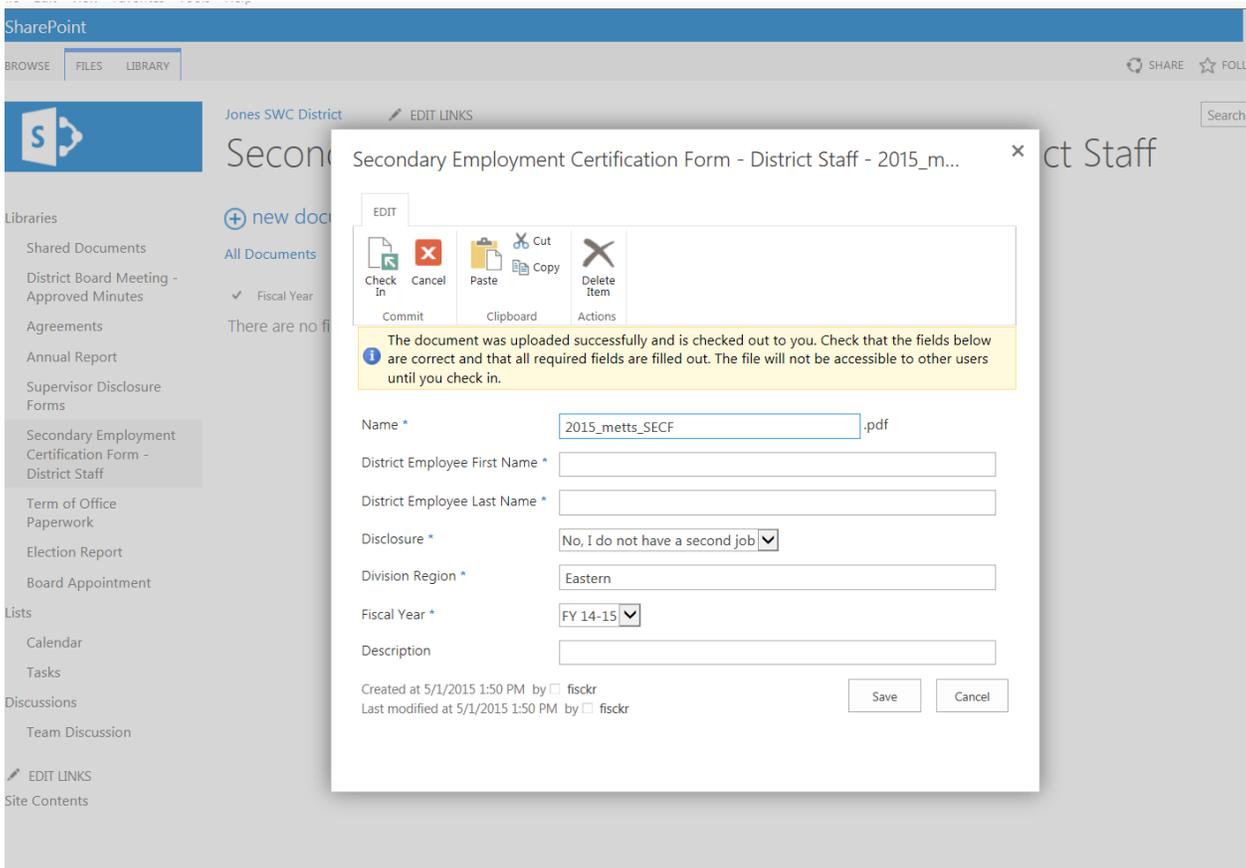
Click "Browse" to navigate to where you saved the document you want to upload.



Click on the document (should be named "yyyy\_districtemployeelastname\_SECF"), and then click "Open".



Then click "OK".



You will be brought to a screen where you will provide more details re: this file.

- Input the “District Employee First Name”
- Input the “District Employee Last Name”
- Indicate “Disclosure” using the drop-down menu (No, I do not / Yes, I do)
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Indicate the Fiscal Year using the drop-down menu
- Click “Save”

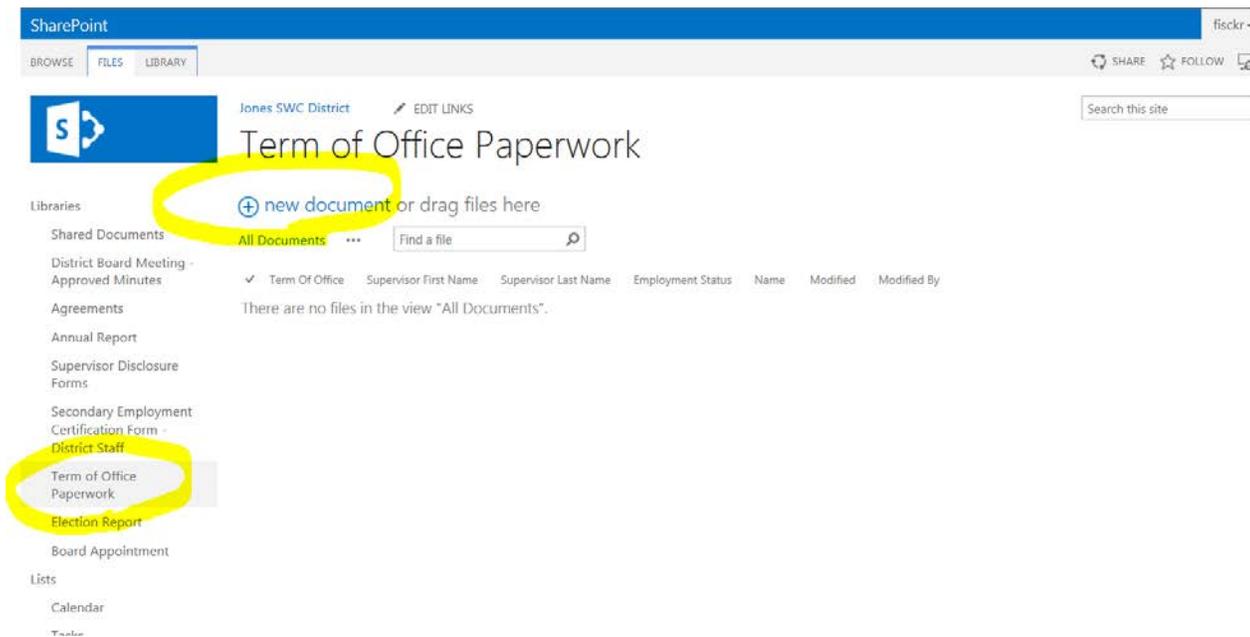
## TERM OF OFFICE PAPERWORK

At the beginning of each term, supervisors are required to take an oath of office prior to acting in their official capacity (but following when their term begins on the first Monday in December), and they are required to submit an employment certification form. Both forms are available online - <http://ncagr.gov/SWC/districts/forms.html>.

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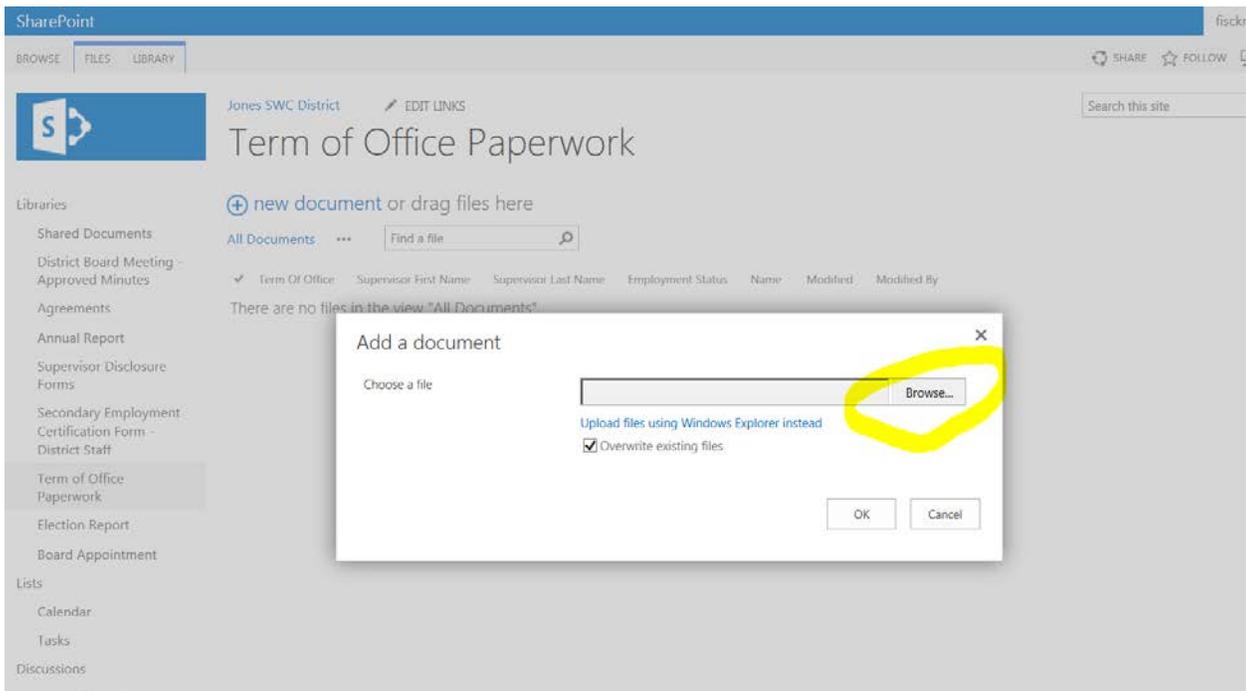
**Scan the oath of office and the employment certification form for each supervisor (2 pages in a single file per supervisor). Most districts will have 3 files to save in this library for 2014 – two elected and one appointed; most districts will have 2 files to save in this library in 2016 – one elected and one appointed) “termfirstyyyy\_supervisorlastname\_TOO” (example: 2014\_jones\_TOO).**

Term of office paperwork is required to be scanned beginning with 2014-2018 terms.

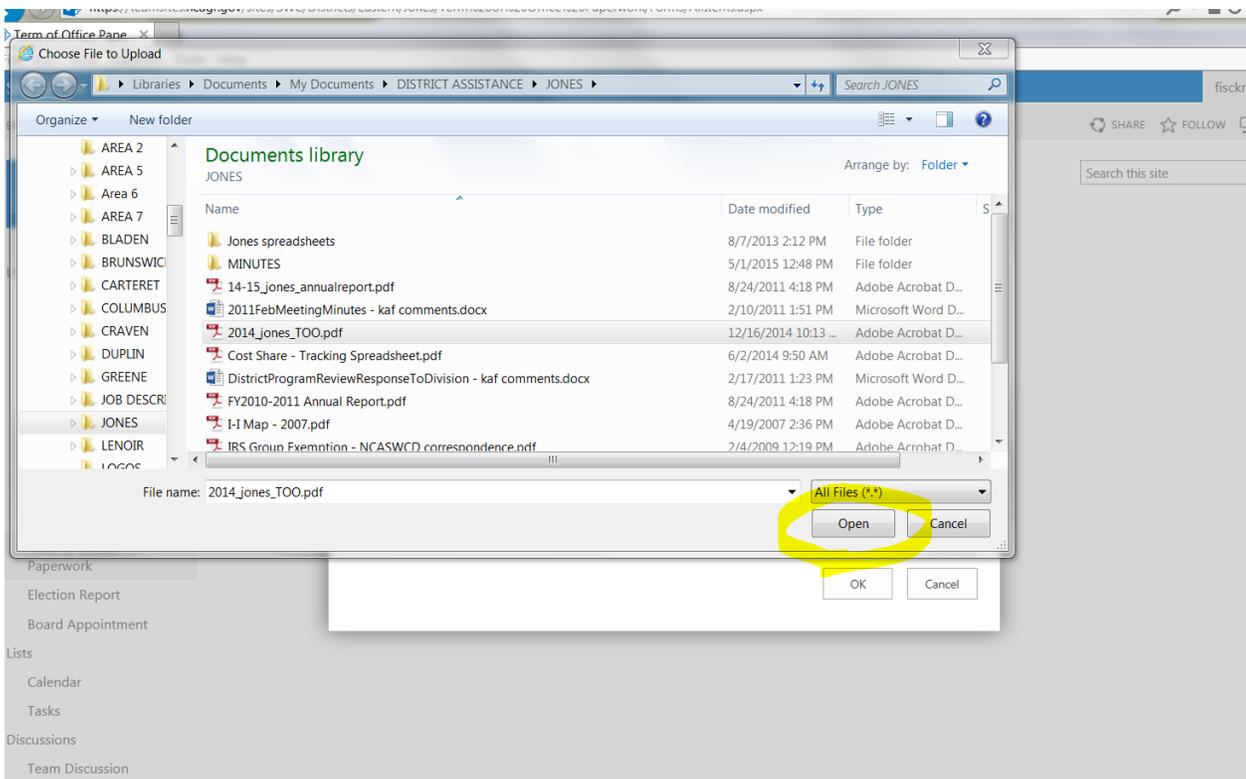


Click the “Term of Office Paperwork” library on the left.

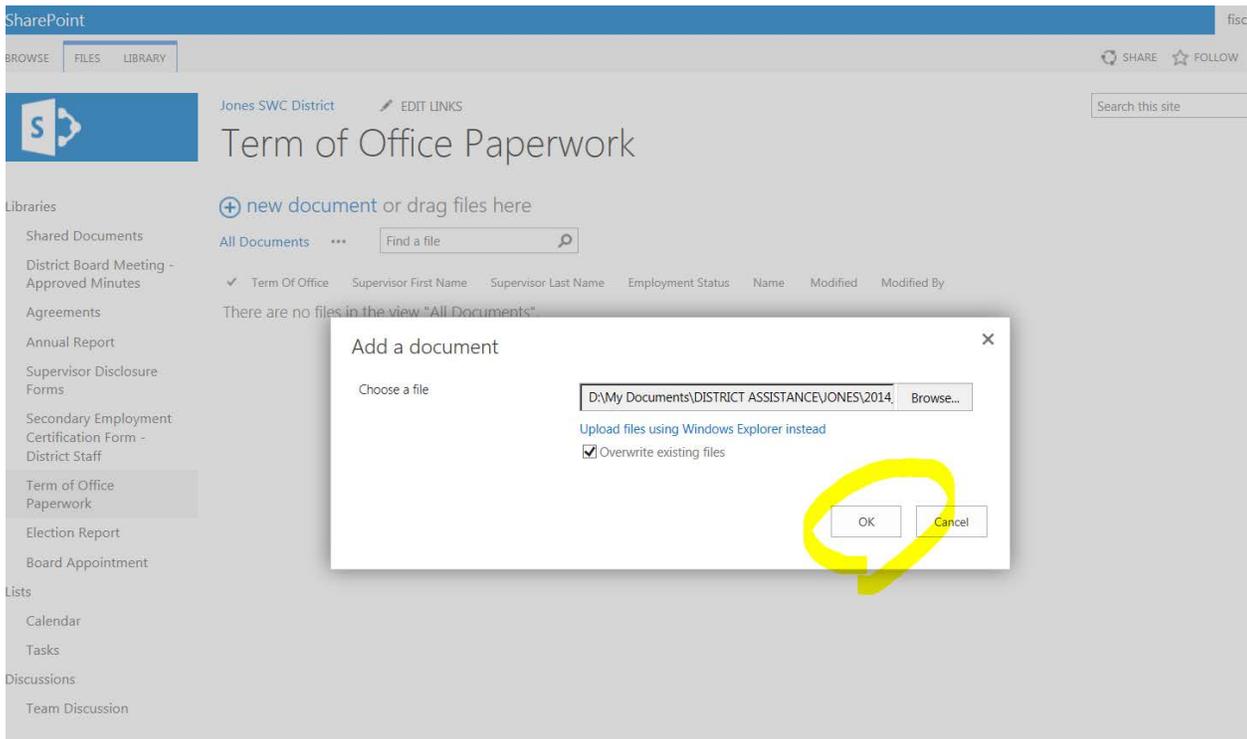
Click “+ new document” to add your scanned .pdf to the page.



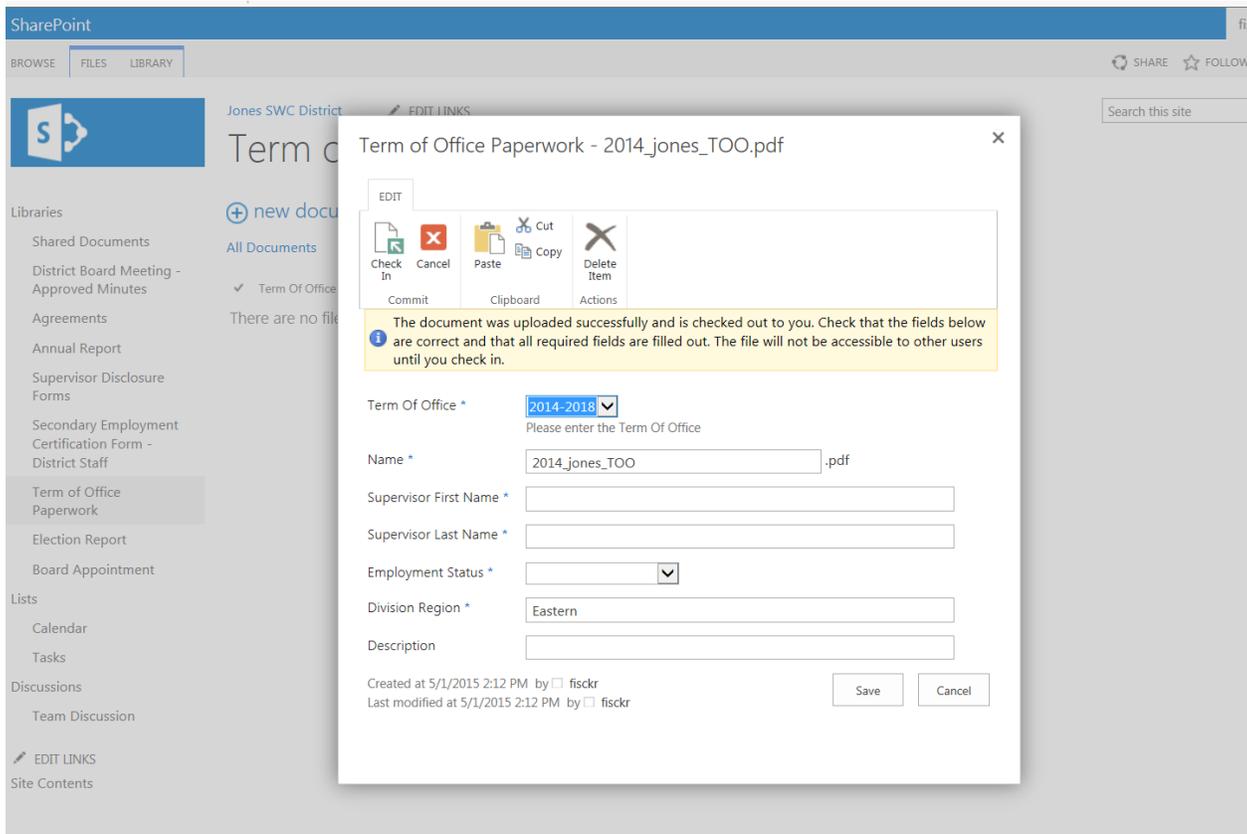
Click "Browse" to navigate to where you saved the document you want to upload.



Click on the document (should be named "termfirstyyyy\_supervisorlastname\_TOO"), and then click "Open".



Then click "OK".



You will be brought to a screen where you will provide more details re: this file.

- Indicate the “Term of Office” using the drop-down menu
- Input the “Supervisor First Name”
- Input the “Supervisor Last Name”
- Indicate “Employment Status” using the drop-down menu (state employee / non-state employee)
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Click “Save”

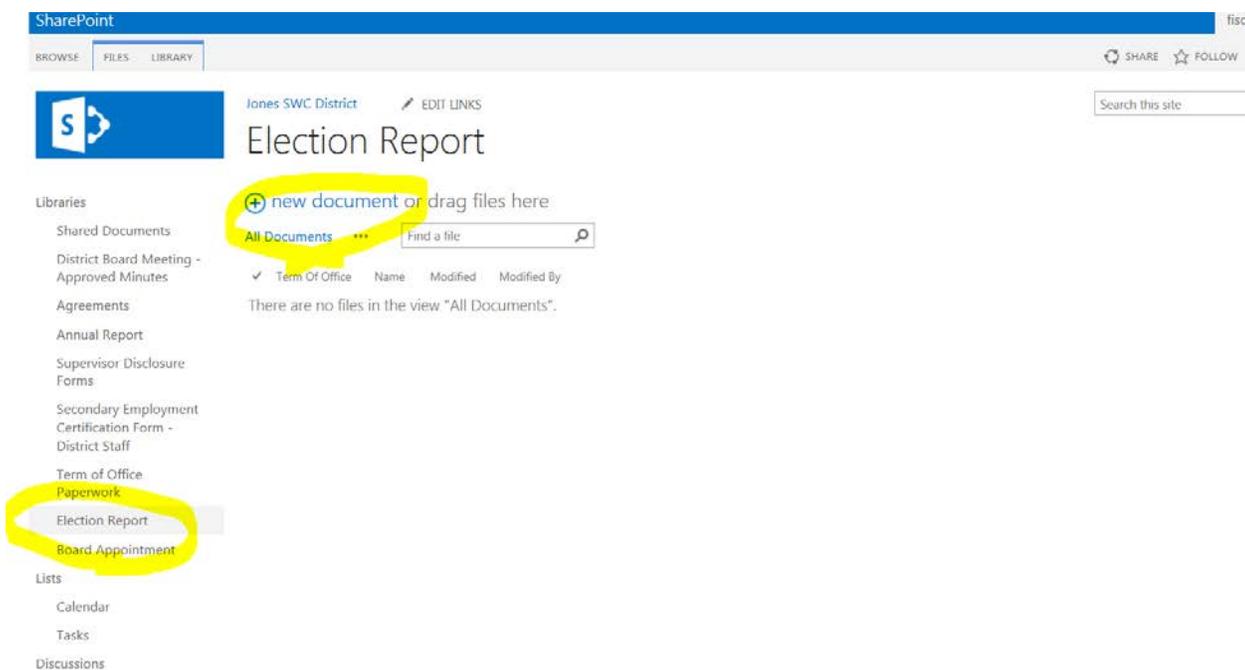
## ELECTION REPORT

Districts are asked to have election reports filled out by the chairman of the county board of elections when a supervisor is elected to office. Forms are available online - <http://ncagr.gov/SWC/districts/forms.html>.

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**Scan the election reports for a given year (n.b. 2 pages for 2014 since most districts had two supervisors elected to office; 1 page in 2016) “yyyy\_districtname\_electionreport” (example: 2014\_jones\_electionreport).**

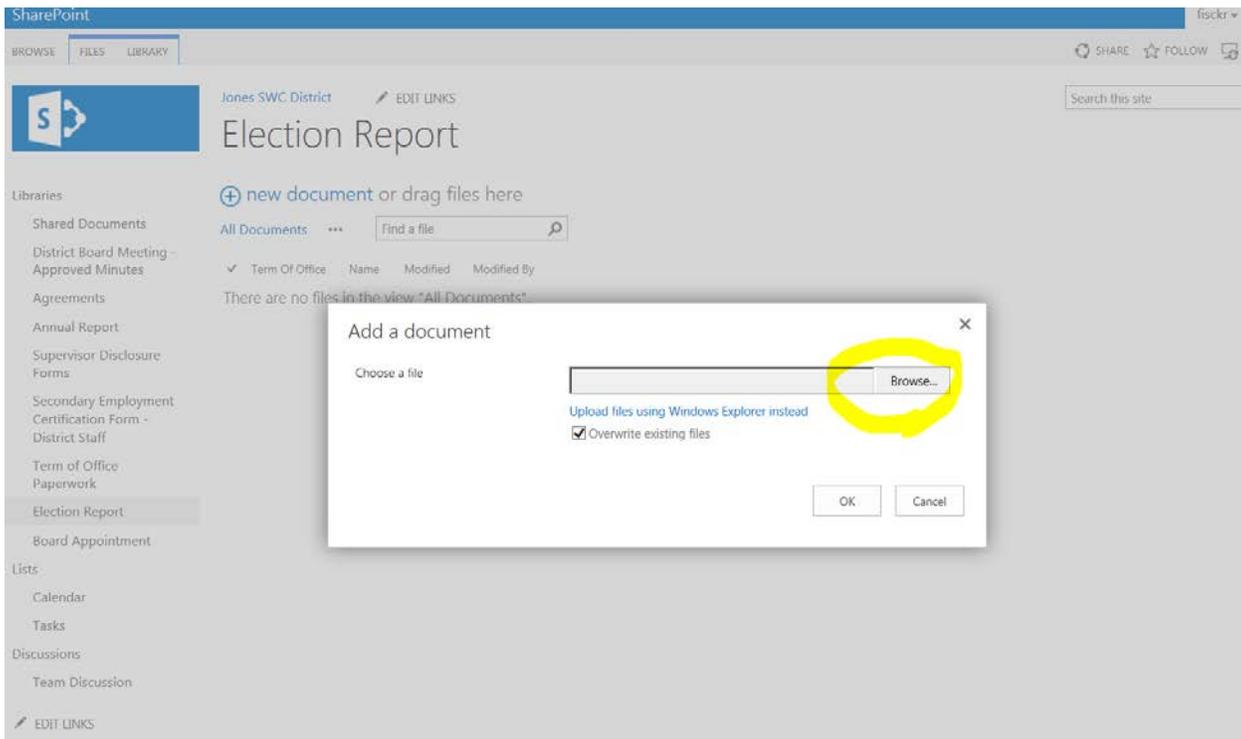
Election reports are required to be scanned beginning in 2014.



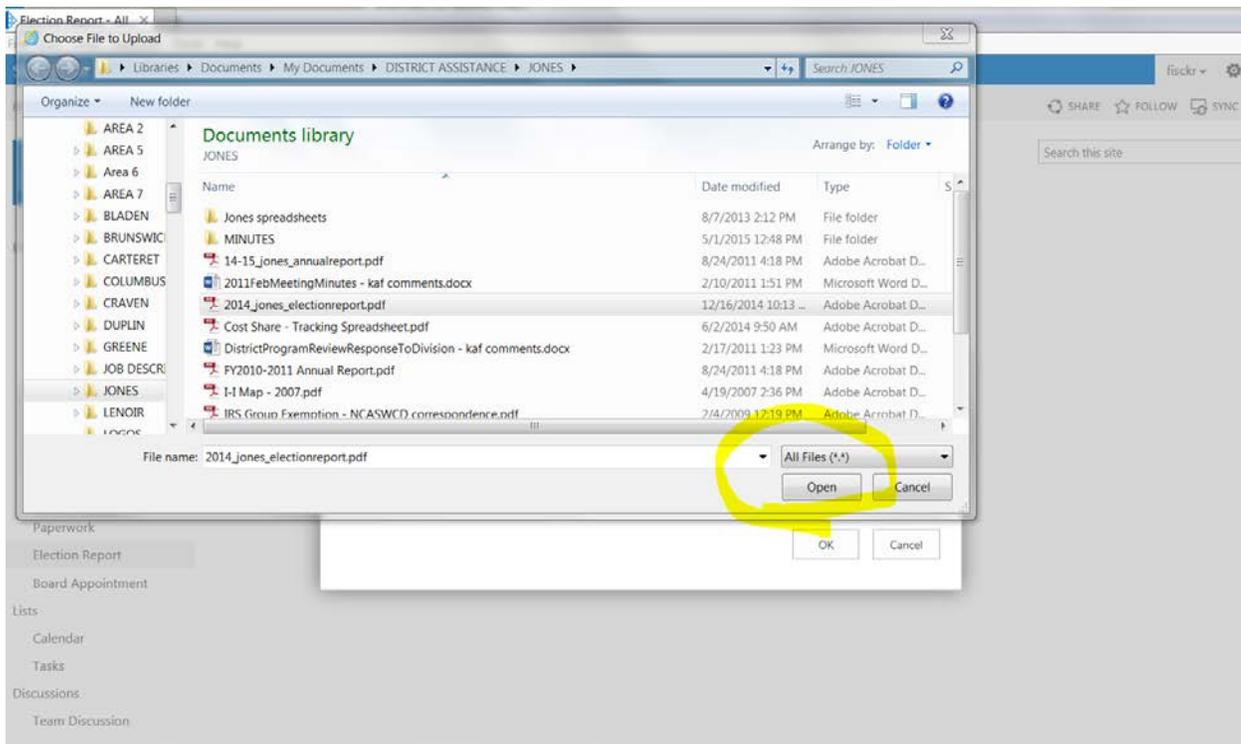
The screenshot shows the SharePoint interface for the 'Jones SWC District' site. The page title is 'Election Report'. On the left sidebar, under 'Libraries', the 'Election Report' library is highlighted with a yellow circle. In the main content area, the '+ new document or drag files here' button is also highlighted with a yellow circle. Below this button is a table with columns 'Term Of Office', 'Name', 'Modified', and 'Modified By'. The table is empty, and the message 'There are no files in the view "All Documents".' is displayed below it.

Click the “Election Report” library on the left.

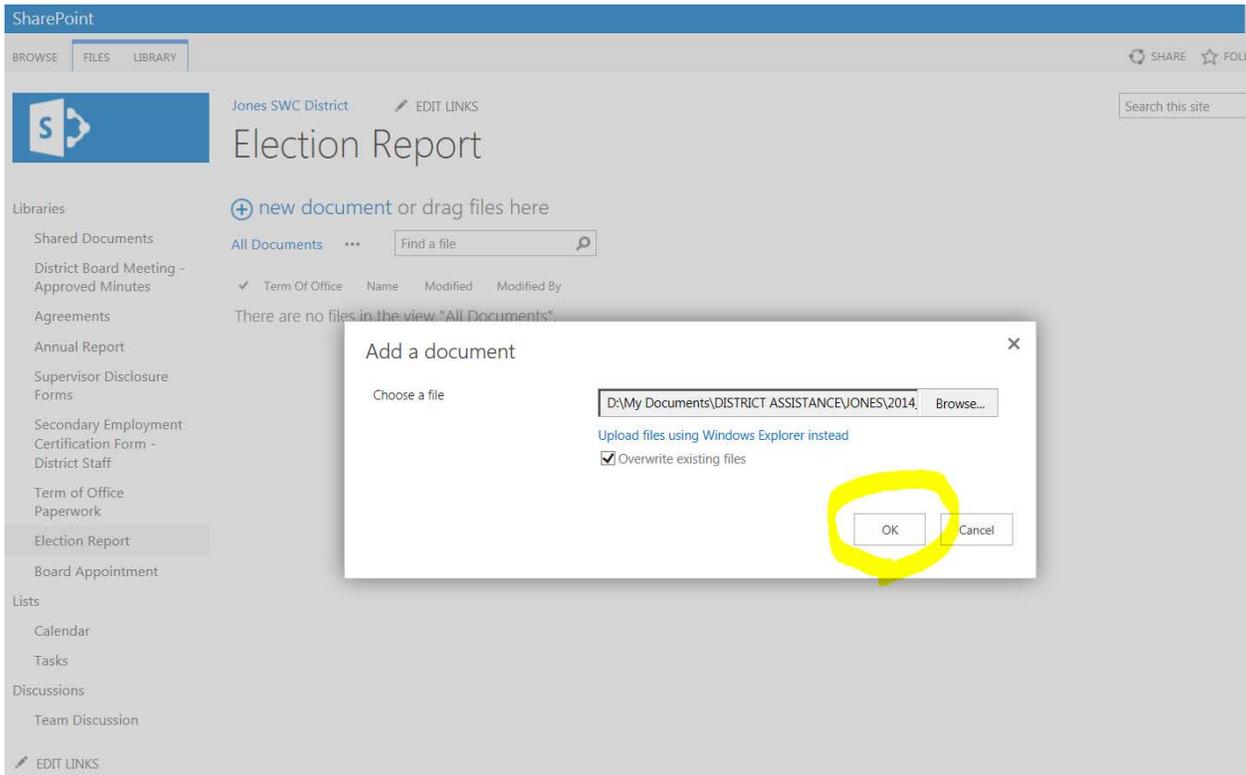
Click “+ new document” to add your scanned .pdf to the page.



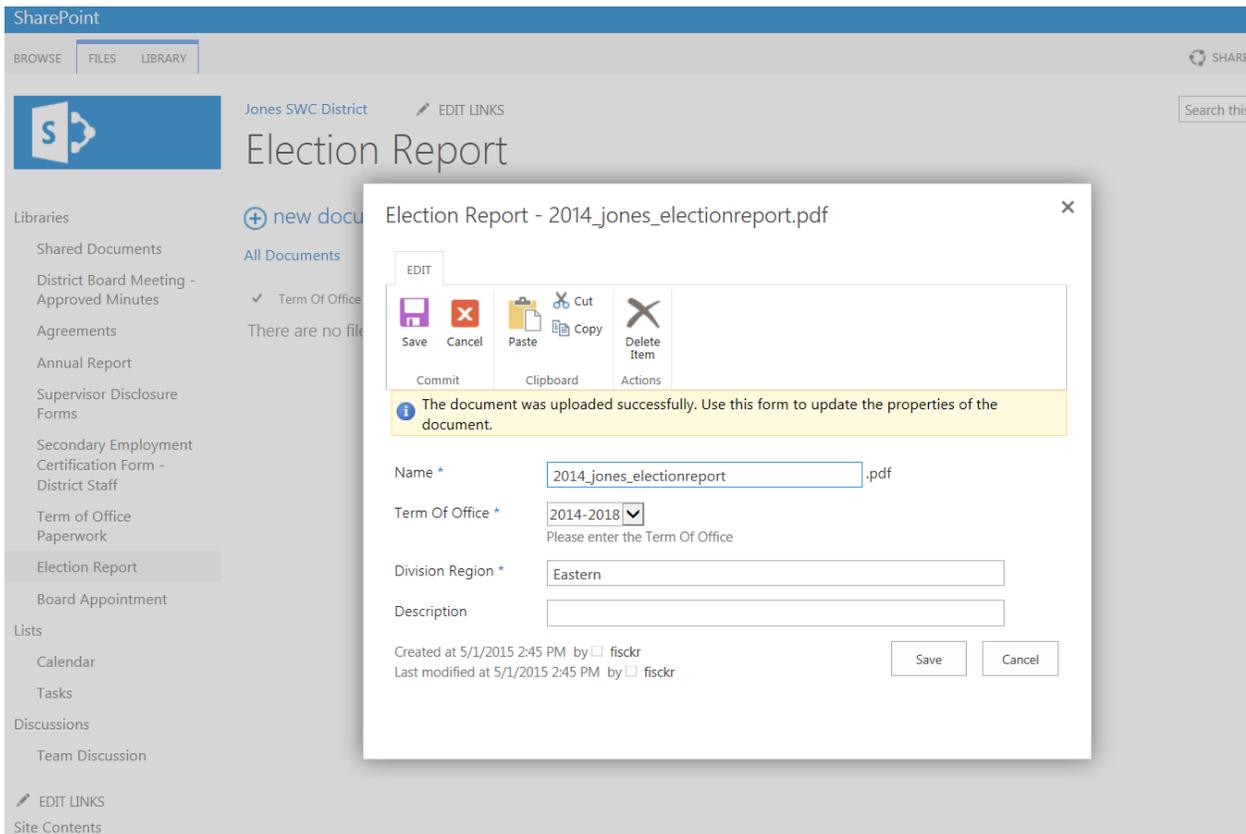
Click "Browse" to navigate to where you saved the document you want to upload.



Click on the document (should be named "yyyy\_districtname\_electionreport"), and then click "Open".



Then click "OK".



You will be brought to a screen where you will provide more details re: this file.

- Indicate the “Term of Office” using the drop-down menu
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Click “Save”

## BOARD APPOINTMENT

When districts recommend an individual for appointment / reappointment as a district supervisor, forms are submitted for commission review and approval. The commission has adopted guiding principles for districts to use in their selection process; forms and details related to commission policy are available online -

<http://ncagr.gov/SWC/districts/forms.html>.

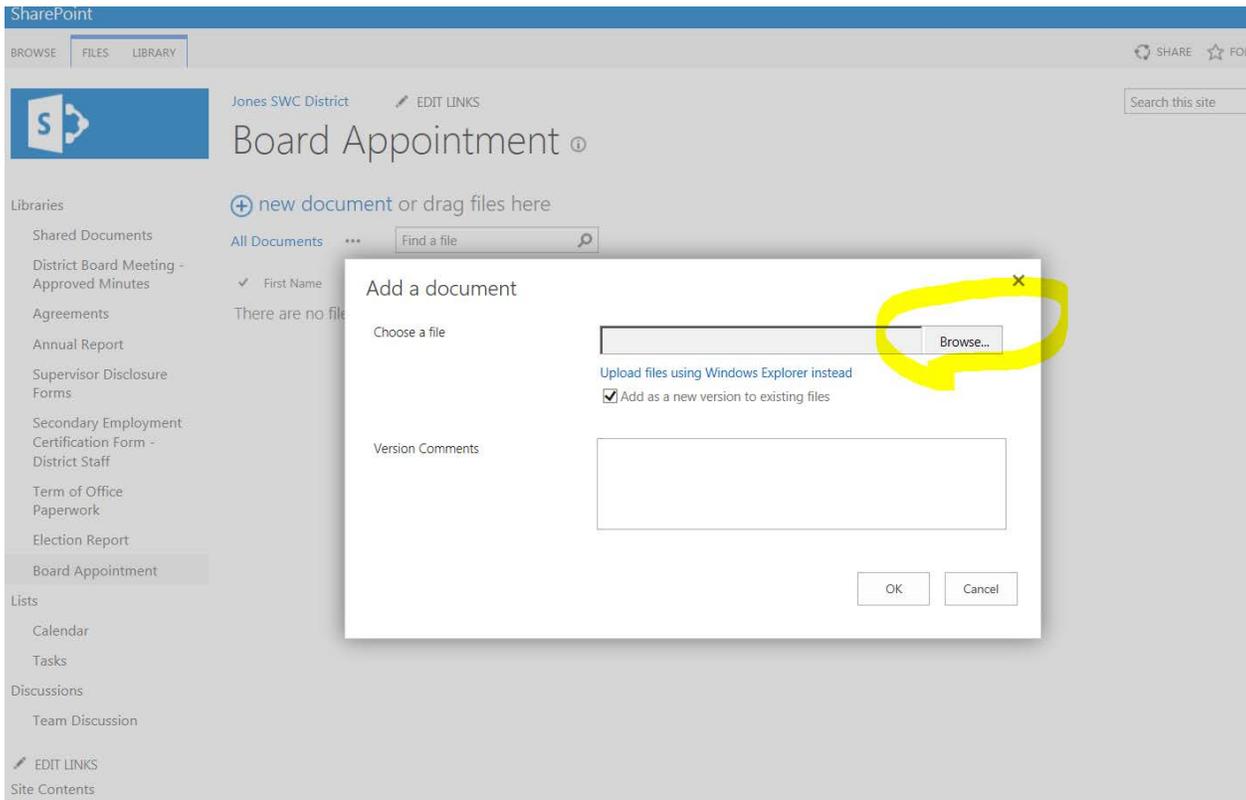
\*Please note that what you save in the SharePoint system are copies of your local district files. Districts are required to maintain original files in accordance with your document retention schedule. The intent of the SharePoint system is to provide an efficient way for you to submit material to the division, but **DO NOT RELY** on this system as a means to maintain your district files. Division staff will archive / delete materials periodically. Please make sure your district maintains your local records as required.

**Scan the appointment / reappointment forms, and associated resignation letters when appropriate “yyyy\_individuallastname\_appointment”** (example: 2015\_jones\_appointment).

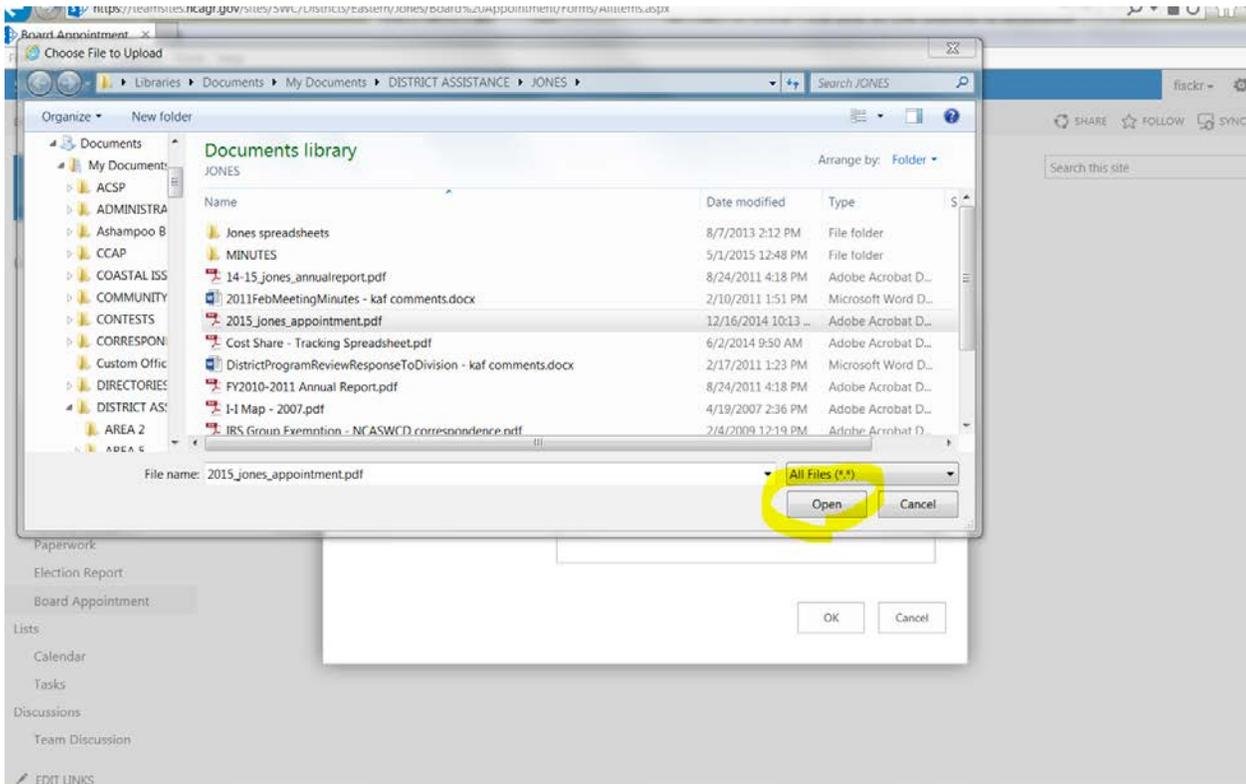
Recommendations for appointment or reappointment are required to be scanned beginning June 2015.

Click the “Board Appointment” library on the left.

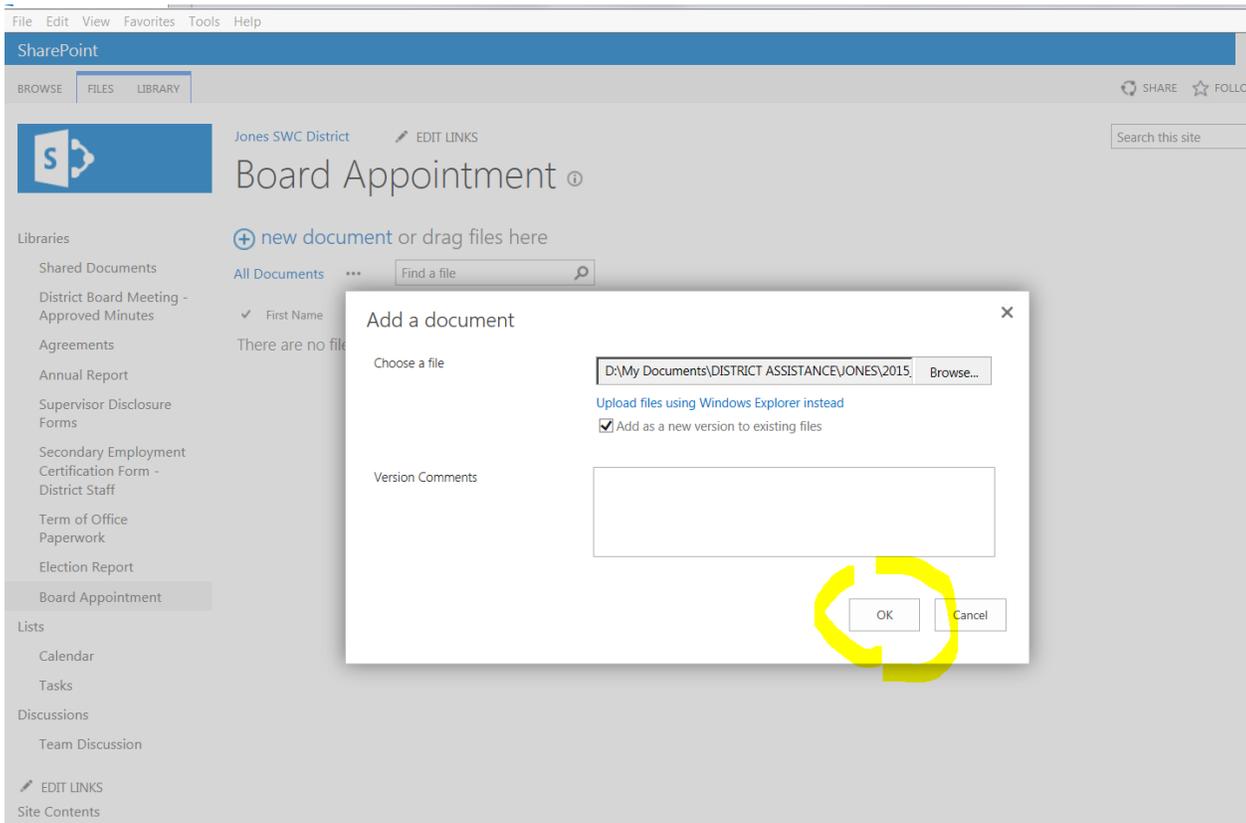
Click “+ new document” to add your scanned .pdf to the page.



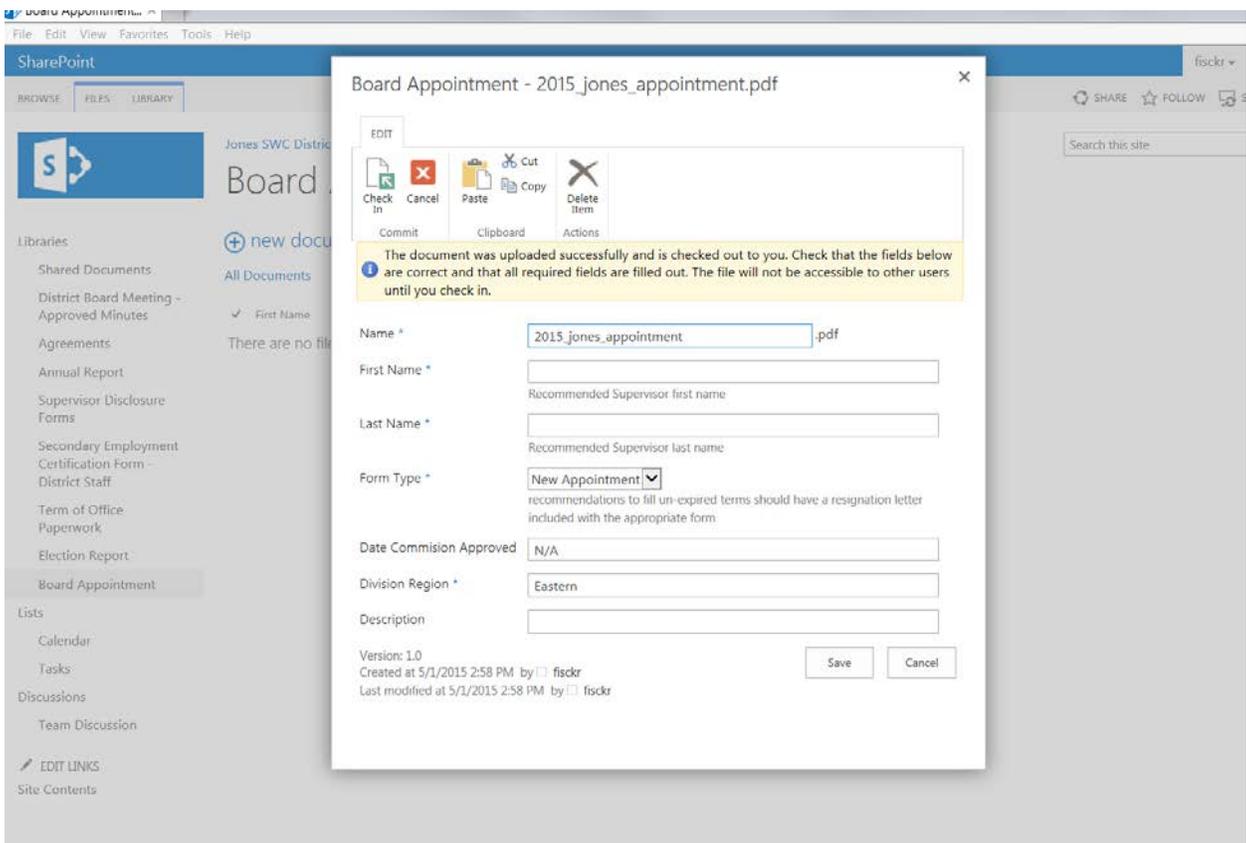
Click "Browse" to navigate to where you saved the document you want to upload.



Click on the document (should be named "yyyy\_individuallastname\_appointment"), and then click "Open".



Then click "OK".



You will be brought to a screen where you will provide more details re: this file.

- Indicate the “First Name” of the individual being recommended
- Indicate the “Last Name” of the individual being recommended
- Indicate the “Form Type” (new appointment / reappointment)
- Date Commission Approved will be N/A when you upload – Kristina Fischer will update this following commission action
- Division Region should be automatically populated for you – please let your coordinator know if there are problems with this
- Click “Save”
- Email Kristina Fischer ([kristina.fischer@ncagr.gov](mailto:kristina.fischer@ncagr.gov)) to let her know you have uploaded this file. She will check the paperwork to be sure it is accurate and complete, and can let you know when to anticipate a response on your board’s recommendation