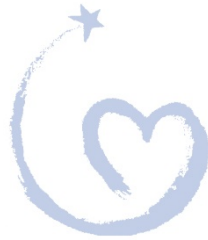


# CCDF Tribal Plan Preprint: Fillable PDF User Guide



**August 8, 2019**

This user's manual is a technical assistance product of the Office of Child Care, Administration for Children and Families, US Department of Health and Human Services. The guide is for distribution according to department policy. It was produced by General Dynamics Information Technology under contract HHSP233201600263W.

**Table of Contents**

**COMPLETING THE FY2020-2022 CCDF TRIBAL PLAN PREPRINT..... 3**

**WHAT IS A FILLABLE PDF? ..... 3**

    SOFTWARE REQUIRED TO VIEW AND COMPLETE A FILLABLE PDF..... 3

**HOW TO USE THE FILLABLE PDF ..... 6**

    1. How to START ..... 6

    2. How to SHARE ..... 7

    3. How to Move through the Fillable PDF..... 7

    4. How to Enter Information in the Fillable PDF ..... 8

    5. Data Entry Tips and Hints ..... 12

    6. Tips for Completing the Tribal CCDF Plan Preprint ..... 13

    7. Printing the Fillable PDF ..... 14

**HOW TO SUBMIT YOUR PLAN ..... 15**

    How to Email a Large Fillable PDF ..... 15

    How to Encrypt a Fillable PDF ..... 16

**HOW TO GET HELP..... 18**

## COMPLETING THE FY2020-2022 CCDF TRIBAL PLAN PREPRINT

The Tribal Plan is the Lead Agency’s application for the Child Care and Development Fund (CCDF) grant. The Office of Child Care (OCC) released the FY2020-2022 CCDF Tribal Plan Preprint, the template that outlines the information required in the Plan, as a *fillable PDF*. This fillable PDF format will allow OCC the ability to more easily summarize information provided in CCDF Tribal Plans. Each Lead Agency must complete the CCDF Tribal Plan Preprint and submit it to their Regional Office for approval **no later than September 6, 2019**.

### WHAT IS A FILLABLE PDF?

A fillable PDF is an interactive document that can be completed on your computer by selecting or typing information into the various response fields. The field types include standard text boxes, checkboxes, radio buttons, dates, and file attachments.

### SOFTWARE REQUIRED TO VIEW AND COMPLETE A FILLABLE PDF

To complete and print the fillable PDF, you will need to use **Adobe Acrobat Reader** software. The latest version, *Adobe Acrobat Reader DC*, is preferred. *Adobe Acrobat Reader DC* should be used to ensure that all the standard functions work as expected in the fillable PDF version of the Preprint. Specifically, attachments will only work if you are using versions DC or XI. Using the Reader DC version will also help ensure that **National Center on Data and Reporting (NCDR)** staff are able to provide quick and standard technical assistance.

**FREE Adobe Software**  
Remember, the basic  
*Adobe Acrobat Reader*  
software is free!

Click here for the Free Download: <https://get.adobe.com/reader/>

Click here for Basic Instructions: <https://helpx.adobe.com/acrobat/using/workspace-basics.html>

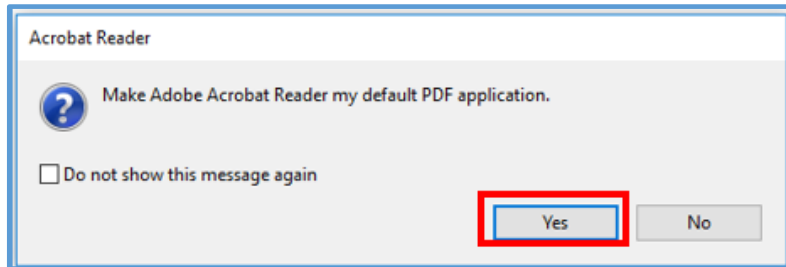
Click here to see the System Requirements: <https://helpx.adobe.com/reader/system-requirements.html>

If you don’t have **Administrative Rights** to download software to your computer, work with your IT staff immediately to download the *Adobe Acrobat Reader DC*. Please have IT staff download the software on the computers of ALL staff persons who will be assisting you in entering the details of your Plan.

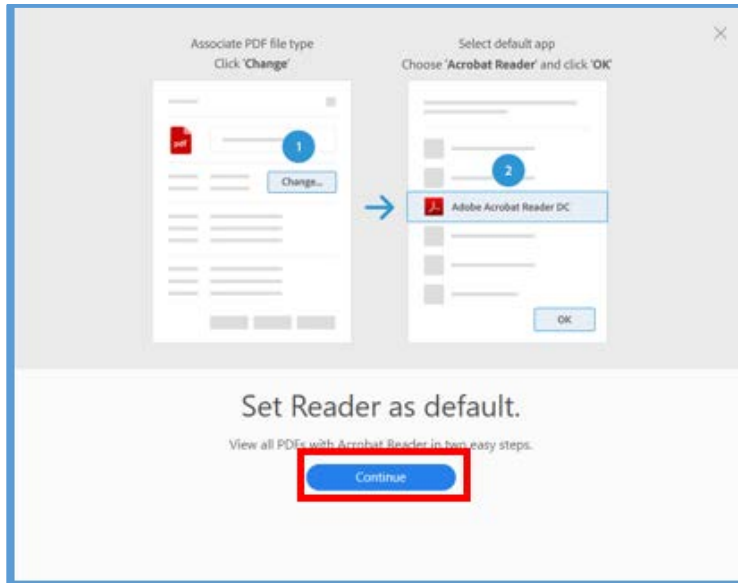
## Making Adobe the Default in Microsoft 10

For Microsoft 10 users, the default PDF reader is Microsoft Edge. You must make Adobe your default so that when you open the Preprint, it opens in Adobe. When it opens in Edge, you will **not** be able to enter the details of your Plan as it will **not** be fillable.

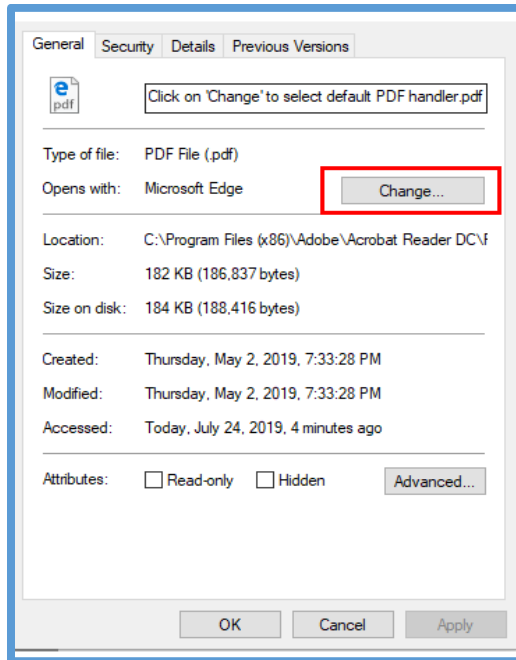
After installing, open *Adobe Acrobat DC Reader*. To make Adobe the default, click **'Yes'** to the prompt regarding whether you want to make it the default PDF application.



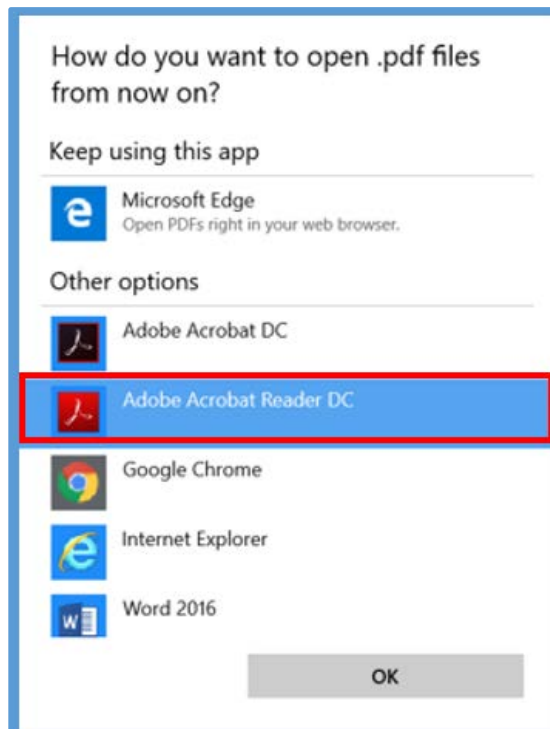
- Click the **'Continue'** button



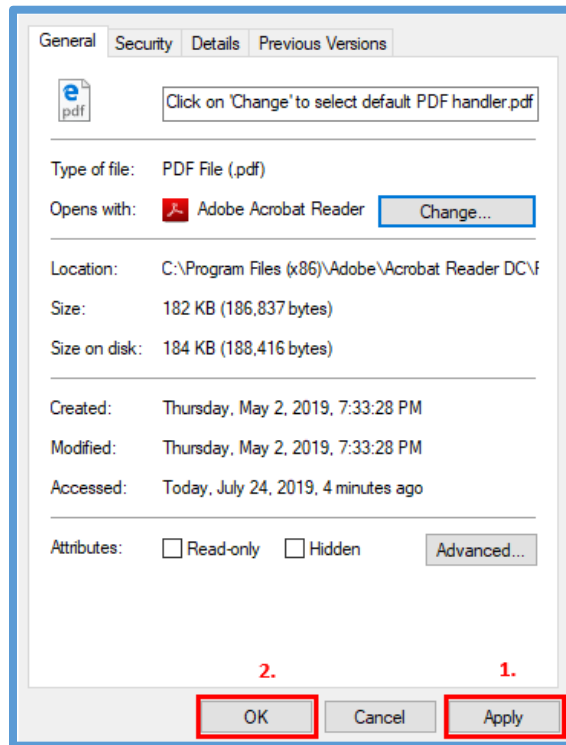
- Click the **'Change'** button on the next pop-up



- Select **'Adobe Acrobat Reader DC'**



- Click the 'Apply' button, and
- Click the 'OK' button

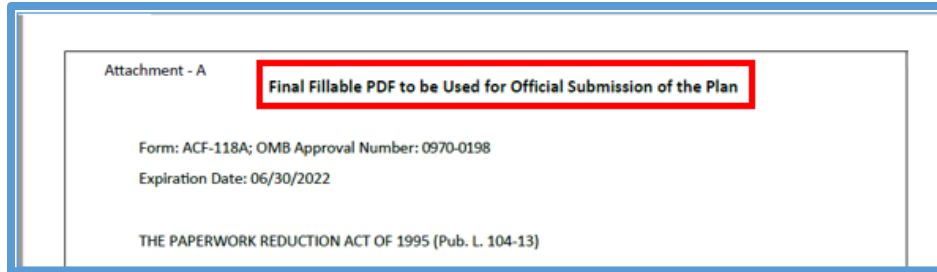


## HOW TO USE THE FILLABLE PDF

### 1. How to START

The Office of Child Care (OCC) emailed the fillable PDF to your Tribal Lead Agency, and it is also available on the OCC web site at <https://www.acf.hhs.gov/occ/resource/ccdf-acf-pi-2019-03>. You have to save the fillable PDF to your computer. The fillable PDF released by OCC has the following header at the top of the first page: **Final Fillable PDF to be Used for Official Submission of the Plan**. Double-check that you have the correct version as this is the only version that is fillable (one which you are able to enter the details of your Plan).

You cannot modify any other PDF versions of the Preprint that you may have received in order to submit it to the Regional Office.



### Save

Right-click on the file and select **Save As** to download the blank fillable PDF to a location on your computer or to a shared server. Remember to rename the file using the name of your Tribe and version in the file name.

**Example File Name:** *FY2020-2022 CCDF Tribal Plan Tribe Name Version1.pdf*

Your Regional Office staff may request changes after you have sent the Plan for review but prior to approving the Plan. If this is the case, save your Plan with the next sequential version number as a new document, and make the requested changes.

**Example File Name:** *FY2020-2022 CCDF Tribal Plan Tribe Name Version2.pdf*

### View

To view the downloaded form, double click on the file name. If you have made Adobe Reader DC your default, it will automatically open in Adobe. Another way is to open Adobe Acrobat Reader first and then browse for your file. Click **File** then **Open**, browse to the location where the form is saved, select the downloaded file, and click **Open**.

## 2. How to SHARE


The fillable PDF document can be shared among multiple users via a server, email, or portable storage device such as a USB flash drive. It is HIGHLY recommended to only have a single working copy of your Plan so that everyone working on the Plan is inputting information in the same document.

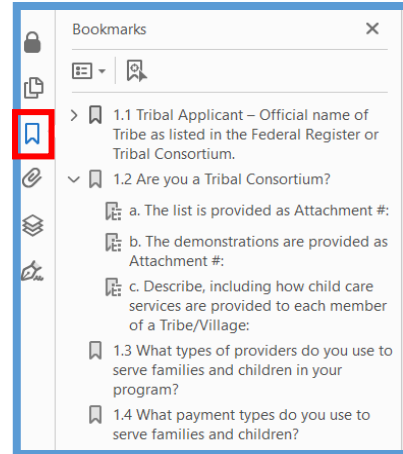
**Keep ONLY ONE Copy**  
Keep just one copy of your Tribal Plan PDF so that all information is in one document.

## 3. How to Move through the Fillable PDF

There are several ways to move through the various sections of the fillable PDF form:

1. Use the links in the **Table of Contents**, found on page 2 of the fillable PDF.
2. Use the *Adobe Acrobat* **Bookmarks** feature:

- a. Click the bookmarks icon  in the Navigation Pane along the left, or click **View, Show/Hide, Navigation Panes** and **Bookmarks** to display Bookmarks in the Navigation Pane.
- b. Click on a bookmarked section to go to that specific section in the document.
- c. Click on the arrows next to some section names to view/hide any related subsections. (Shown in the figure at right.)



3. Use the keyboard **Tab** feature to navigate question by question so you don't miss any responses:
  - a. Press **Tab** on your keyboard to move forward to the next form field.
  - b. Press **Shift+Tab** on the keyboard to move backward to the previous form field.
4. Use the computer mouse to scroll through the form and move from field to field.

#### 4. How to Enter Information in the Fillable PDF

Throughout the fillable PDF, there are form fields in which you can enter your responses. There are five kinds of form fields: text boxes, check boxes, radio buttons, dates, and file attachments.

#### UNDO and REDO Actions

You can **undo** your last action or **redo** a previously undone action by clicking **Edit** and **Undo** or **Edit** and **Redo** in the Adobe Acrobat Menu Bar.

#### Text Boxes

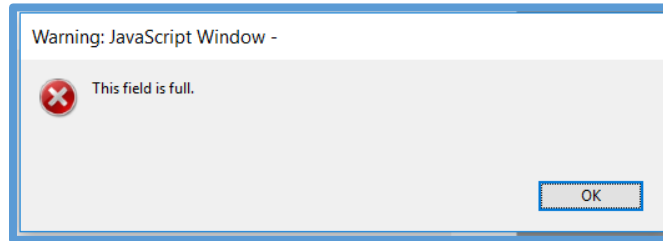
Text boxes are size limited! There are single line and multi-line text box options. The amount of space shown is the amount of space given to enter a response (text boxes do not expand). If a user attempts to enter more text into the field than what is shown on screen, an alert will show stating, "This field is full." If your response will not fit in the allowable space, you have to modify your

#### Text Box LIMITS

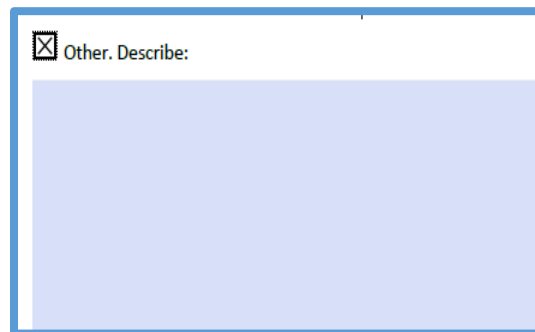
Text boxes have size limits. Do not type in more information than the size of the text box!



response so that it has fewer characters and will fit in the text box. If you have questions, reach out to your Regional Office about the most important information to include in your response.



Throughout the fillable PDF, text boxes will be inactive until you activate them by clicking the associated check boxes. You will not be able to type or paste in the text box. After clicking on the check box, the text box color will change to blue indicating that it is active and that you are now able to enter information in the box.



You can copy text from Word or other programs and paste it into text boxes by right-clicking and selecting either copy or paste. Some questions require users to enter a web link. To include a link in the text box, copy the URL and paste it into the box. Do not copy and paste tables or hierarchical lists into text boxes. Keep in mind the size limits of the text box when you are copying and pasting. You may have to rephrase responses in order to get them to fit in the allotted space.

**COPY and PASTE**  
DO copy & paste text.  
DON'T copy & paste  
tables or lists.

Remember to check for spelling errors and typos. To check spelling:

1. Run a Spell Check throughout the entire document.
  - a. Click **Edit** then **Check Spelling** and **Check Spelling in Comments and Fields**.
  - b. Click **Start** to begin the Spell Check.

**Remember to Check SPELLING**

Remember to check for spelling errors and other typos before submitting your PDF!

**Check Boxes:**

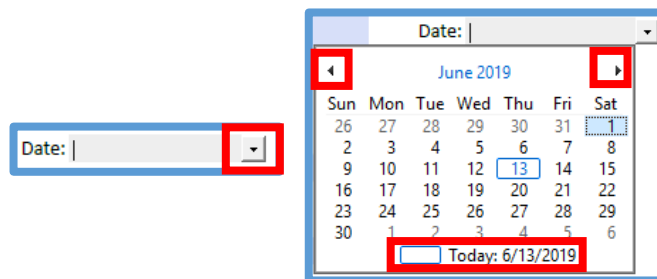
Check boxes  allow multiple response selection. Click once in the box(es) you wish to select . To undo a selection, click in the box again and the selection will be removed.

**Radio Buttons**

Radio buttons  are used to indicate a single response. Click once in the button you wish to select . Make sure that if you use "Tab" to move through the form you have the correct response selected for radio button questions before moving on to the next question.

**Dates**

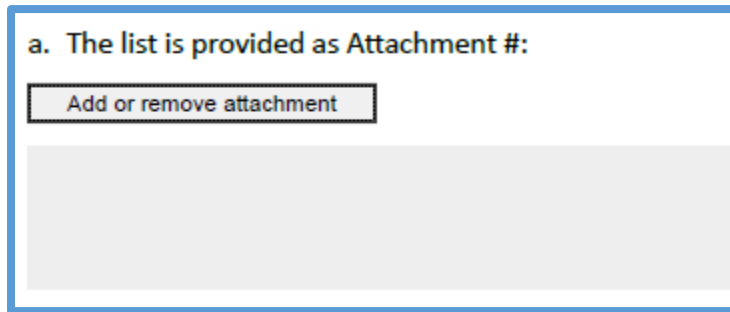
Date fields can be entered in the MM/DD/YYYY format or selected from the calendar to indicate specific dates. To use the calendar feature, click inside the date field and then click the drop-down arrow to show the calendar. Use the left and right arrows in the calendar to choose a month. Then, click on a specific date to select it, or click the box at the bottom of the calendar to select today's date.



## File Attachments

This fillable PDF allows users to attach files for certain questions (for example, question 1.1.2). You can attach virtually any type of documents, but be sure to include only information that addresses the question to which you are responding. **NOTE:** Attachments increase the size of your PDF. For more information on how to send large files via email, see page 15.

To attach a file, click on the **Add or remove attachment** button.

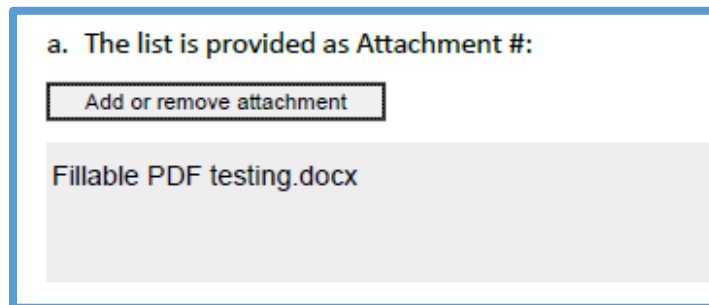


a. The list is provided as Attachment #:

Add or remove attachment

This screenshot shows a rectangular box with a blue border. At the top, it contains the text "a. The list is provided as Attachment #:". Below this text is a button with a black border and the text "Add or remove attachment". Underneath the button is a large, empty, light gray rectangular area, which serves as a text field for the attachment name.

Browse to find the document you wish to attach from your computer, and then click **Open**. The file name of the document you attached will appear in the text field below the button. A message will display indicating that the file has been attached.



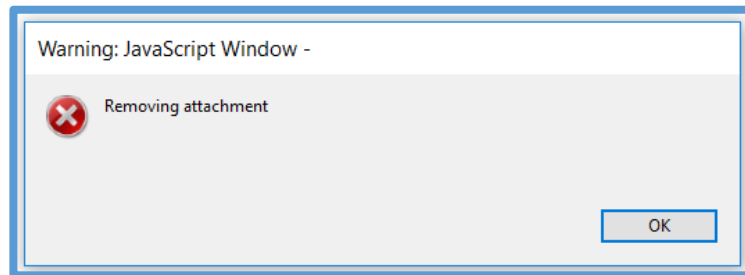
a. The list is provided as Attachment #:


Add or remove attachment

Fillable PDF testing.docx

This screenshot is identical to the one above, but the light gray text field now contains the text "Fillable PDF testing.docx", indicating that a file has been successfully attached.

To remove the attachment, click the **Add or remove attachment** button again. An alert will pop up that the attachment is being removed. Click **OK** if you wish to remove the attachment.



To view attachments, click the **Attachments Icon**  in the Navigation Pane along the left, or click **View, Show/Hide, Navigation Panes** and **Attachments**. Attachments will be listed by document name. Double-click on the attachment you wish to open.

## 5. Data Entry Tips and Hints

Below you will find useful tips to be aware of as you navigate through the Fillable PDF to complete your Plan.

### Skip Patterns

The fillable PDF has built-in skip patterns. Depending upon how you respond to a question, subsequent question(s) must be skipped. The questions that you do not need to respond to will be locked and you will not be able to complete them (i.e. you will not be able to type in text boxes, attach files, etc.). For example, if you respond “Not applicable” to Section 4.1 because you are a Tribe with a medium or large allocation and will describe your direct services in further sections, the remainder of Section 4.1 will be locked because you are not required to respond to those questions. Changing your selection to that original question will modify the skip pattern, unlocking the subsequent question(s).

**4.1** Indicate if this *Tribes with a small allocation* will offer direct child care services. Check the appropriate box below:

Not applicable, as a Tribe with a medium or large allocation we will describe direct services in the next sections. ([Skip to Section 5](#))

No, as a *Tribes with a small allocation* we will not be offering direct child care services. [Stop here and go to the appendices.](#)

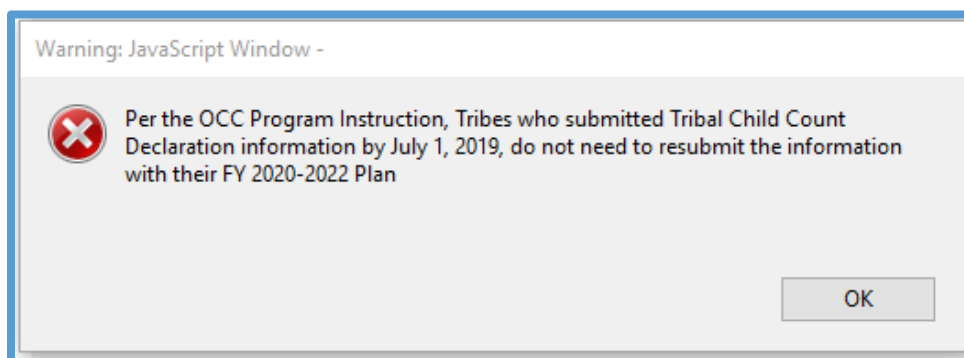
Yes, *Tribes with a small allocation* we will offer direct child care services. Complete the questions below.

a. The Tribal Lead Agency allows parents to choose from the following categories of care. Check all the apply:

Center-based child care, including a Tribally operated center

### Locked Sections

Tribal Lead Agencies were required to submit their Child Count Declarations earlier this year. Therefore, all questions in sections 1.5, 1.6, and Appendices 1 and 1-A of the fillable PDF are locked because grantees are not required to provide a response. If you click on questions in these sections, they will be locked and/or you will receive a pop-up message indicating why the question(s) does not need to be completed.



### 6. Tips for Completing the Tribal CCDF Plan Preprint

Remember to save your work frequently to prevent losing data. Click **File** and **Save** periodically as you work on your Plan.

**Remember to SAVE**  
Click **File** and **Save**  
often to save your work  
and prevent losing data.

The Preprint consists of two parts aligned with the flexibility Tribes have based on the size of their CCDF allocation:

**Part I (To be completed by all Tribal Lead Agencies):** 1) Define CCDF Leadership and Coordination with Relevant Systems; 2) Establish Standards and Monitoring Processes to Ensure the Health and Safety of Child Care Settings; 3) Support Continuous Quality Improvement; and 4) Tribes with small allocations only: Direct Services.

**Part II (To be completed by Tribes with medium and large allocations only):** 5) Provide Stable Child Care Financial Assistance to Families; 6) Ensure Equal Access to High Quality Child Care for Low-Income Children; and 7) Promote Family Engagement through Outreach and Consumer Education.


**Yes and No Response Questions:** When a question requires a “yes” or “no” response, the order of the *yes/no* options changes depending on the question. The simpler response, the one that requires little to no follow up, is listed first. The response that requires more detailed follow up is listed second. For example, if a “yes” response requires an explanation and a “no” response does not, the “no” option will appear first.

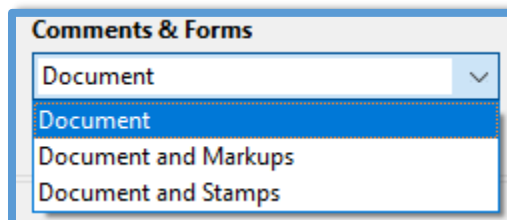
This structure is used to simplify the process of filling out the Plan by allowing users to skip over response choices that are not relevant; it is **NOT** designed to imply that the first answer is the correct answer or the default answer. All questions should be answered in the way that best describes what is actually happening in the Tribal CCDF program.

**YES or NO Questions**  
The order of YES and NO responses changes depending on which response requires more follow up. Make sure you select the right response!

Where appropriate, instructions are included that allow Tribes/Tribal Organizations to skip over certain questions or sections that do not apply.

## 7. Printing the Fillable PDF

To print the PDF, click the **Print** button  in the toolbar, or choose **File** and **Print** from the Adobe Acrobat Menu bar. In the **Comments & Forms** menu in the upper-right area of the Print



dialog box, choose **Document** from the drop-down list (as shown below) and then click the **Print** button.

## HOW TO SUBMIT YOUR PLAN

When you have completed filling out the fillable PDF, send your Plan via email to your OCC Regional Office. Click here for the contact information for the OCC Regional Program Managers: <https://www.acf.hhs.gov/occ/resource/regional-child-care-program-managers>.

In your email, attach the completed fillable PDF of your CCDF Tribal Plan, which includes attachments, and attach a signed letter from your Tribal Leader indicating this is your Tribe’s application for CCDF funds.

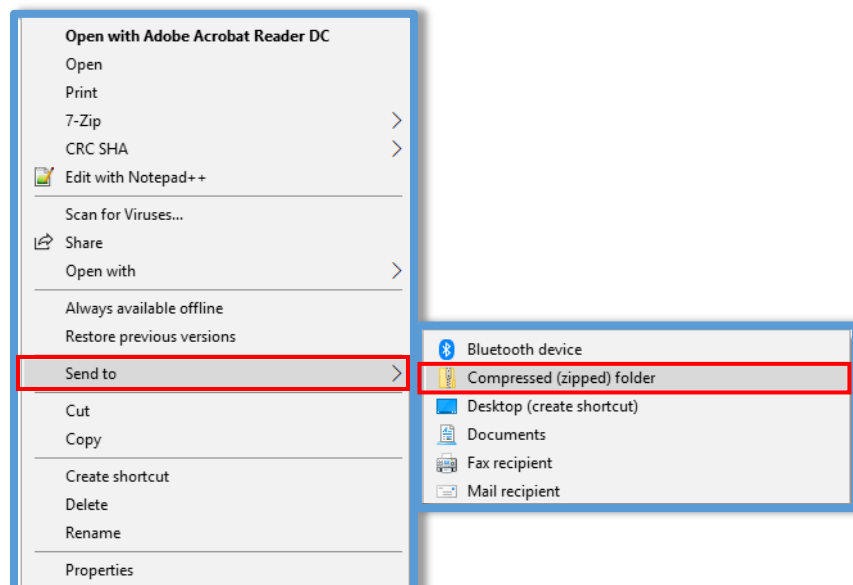
### Email Submission CHECKLIST!

1. Plan PDF.
  2. Application Letter.
- Attach both documents in an email to your Regional Office.

Your Regional Office may request changes prior to approving your CCDF Tribal Plan. If this is the case, save your CCDF Tribal Plan with the next subsequent version number and make the requested revisions. When you have completed your revisions, email the new version of the Plan and your letter back to your Regional Office. In your email, you should detail which sections have changed and one or two sentences that summarize each change.

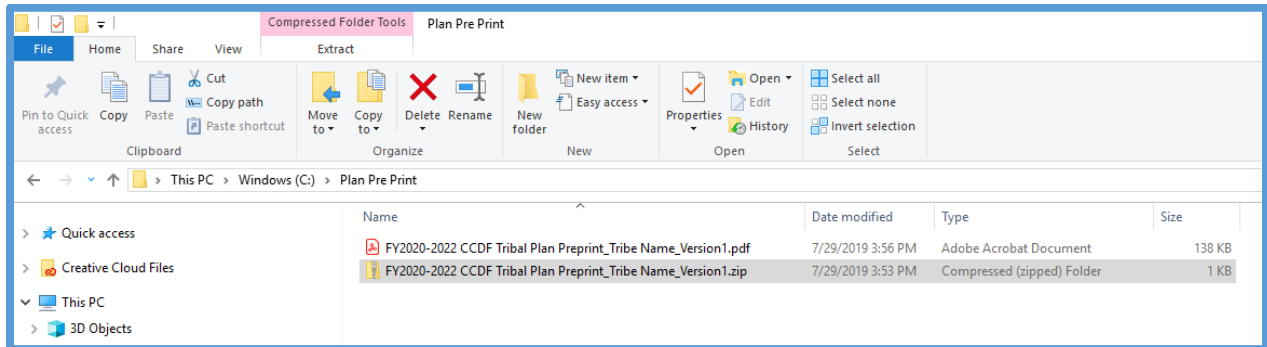
## How to Email a Large Fillable PDF

If you have attached several large files to your fillable PDF, it may be too large to send via email without zipping it. Zipping the file condenses it to a smaller file size making it easier to email. For Windows 10 users, find the file on your computer, right click on the file name, and select



**Send To** and **Compressed (ZIP) folder** (as shown below). If you are using an operating system other than Windows 10, please reach out to NCDR if you need assistance zipping your file.


You can modify the name of the file if desired. The newly zipped file should be smaller than the original file, and the file type will be a “compressed (zipped) Folder”. Send this zip file to your Regional Office instead of the Adobe Acrobat PDF.



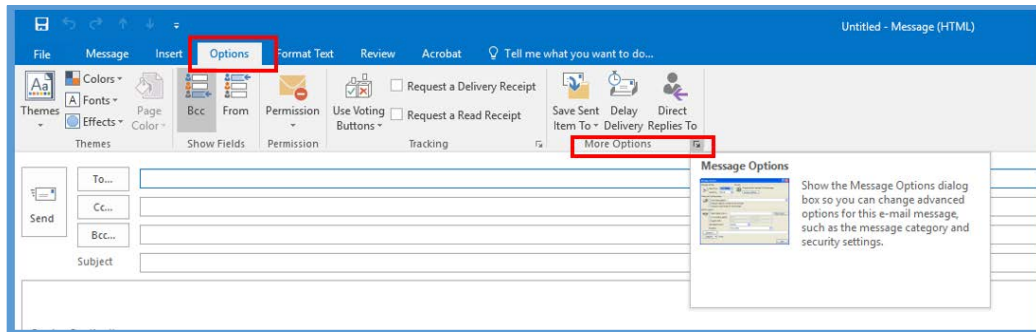
## How to Encrypt a Fillable PDF

If your Tribal Lead Agency requires that you encrypt files before sending them via email, use the method provided by your IT staff for encrypting files. Some email platforms have built-in encryption capabilities, while others require a third-party encryption tool. However, the encrypting and unencrypting is only successful if both parties (the sender and receiver) have the same encryption tool and that encryption is enabled. Therefore, reach out to your RO prior to encrypting your Plan.

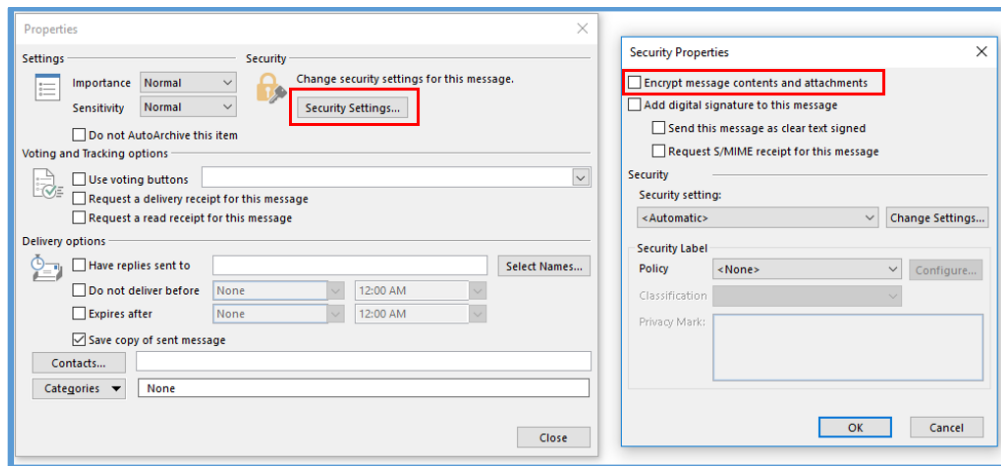
If you have Microsoft Outlook and your Tribal Lead Agency requires that you encrypt files before sending, follow the steps below to encrypt your fillable PDF. If you need assistance encrypting your file using a different email client, contact NCDR. Note: OCC does **NOT** require that you encrypt the Tribal Plan prior to sending to your Regional Office.

1. In the message that you're composing, on the **Options** tab, in the **More Options** group, click the dialog box launcher  in the lower-right corner.





2. Click Security Settings, and then select the Encrypt message contents and attachments check box.



3. Compose your message, and then click Send.

NOTE: In order to encrypt files, the ability to encrypt must be enabled on your computer. If it is not enabled, speak with your IT Administrator to encrypt the file and send it to you or enable the ability for you to encrypt files on your computer.

## HOW TO GET HELP

### OCC Regional Office

Tribal Lead Agencies should contact the appropriate OCC Regional Office for guidance and support related to the content of the CCDF Tribal Plan. [Contact information for the OCC Regional Program Managers](#)

### The National Center on Child Care Data and Reporting (NCDR)

Contact NCDR with questions for using the fillable PDF.

National Center on Child Care Data and Reporting (NCDR)

6003 Executive Blvd., Suite 400

Rockville, MD 20852

Toll-Free 1-877-249-9117

[NCDR@ECETTA.info](mailto:NCDR@ECETTA.info)