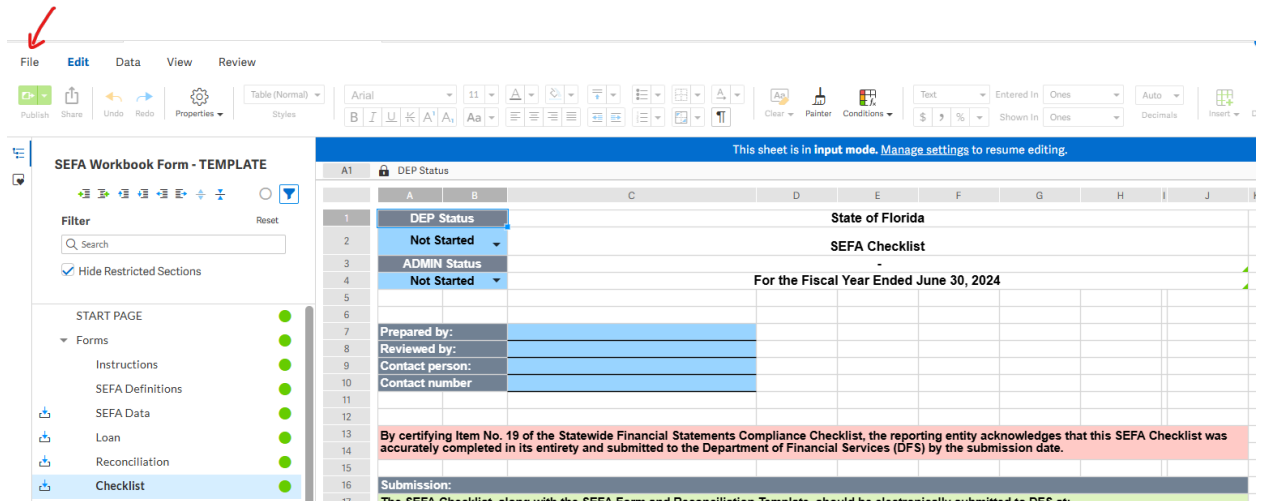


Downloading and Attaching Documents in Workiva for SEFA

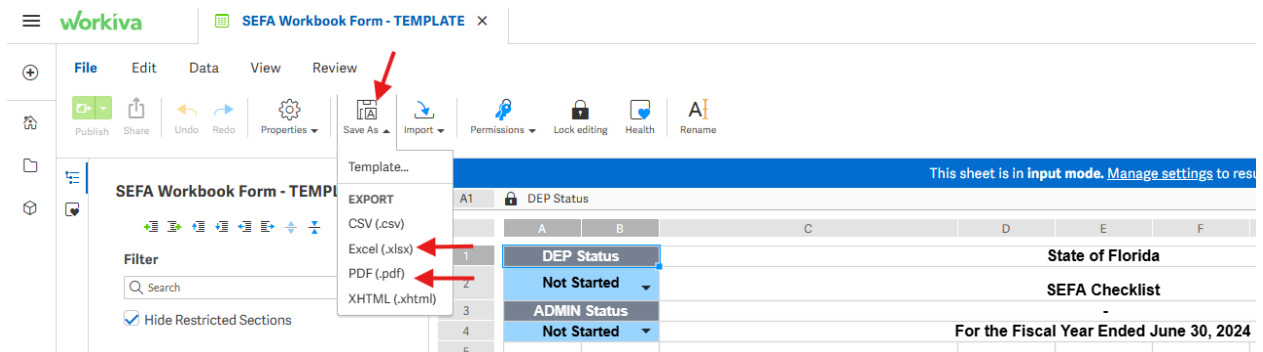
The following procedures are provided for those who need to download a document for example, the checklist so a supervisor can sign it, and then attach it in the proper place for your SEFA submission in Workiva.

To Download

- First go to the page you are wanting to download and click on file. For this example, we will use the checklist as it is the document we see this is needed for most often.



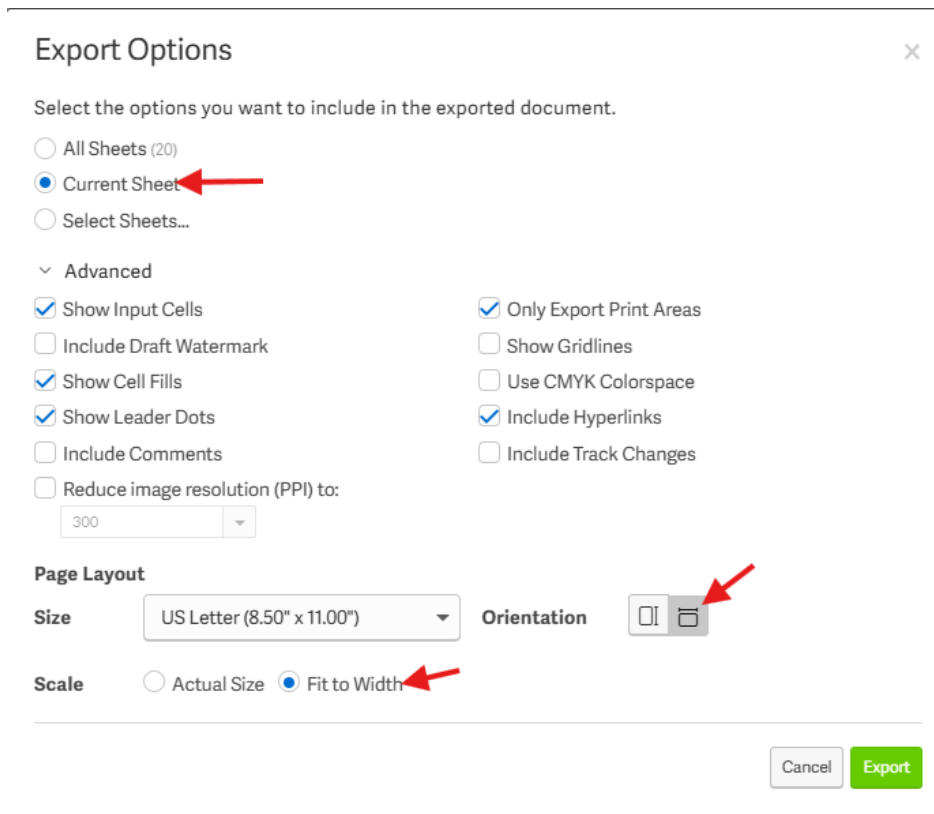
- Then you will click on the Save As drop down and choose either Excel or PDF



- If you choose Excel, choose current sheet and click on the Export values as displayed. The show input cells should also be checked, then click export.



- Then open your file, go to print options to choose the necessary options to print the checklist in its entirety and select print.
- If you choose PDF, choose current sheet, click on the landscape orientation symbol (near the bottom right), and then next to scale, choose the option Fit to Width and click export.



- Then open your file, go to print options, choose the necessary options to print the checklist in its entirety and select print.

To Attach

- Once you have your signature (or in other cases supporting documentation) and are ready to attach it. You will go to the current sheet you need to attach your information to. In this case we are doing the checklist, so you click back into your checklist from your SEFA workbook.

SEFA Workbook Form - TEMPLATE

Filter

Search

Hide Restricted Sections

START PAGE

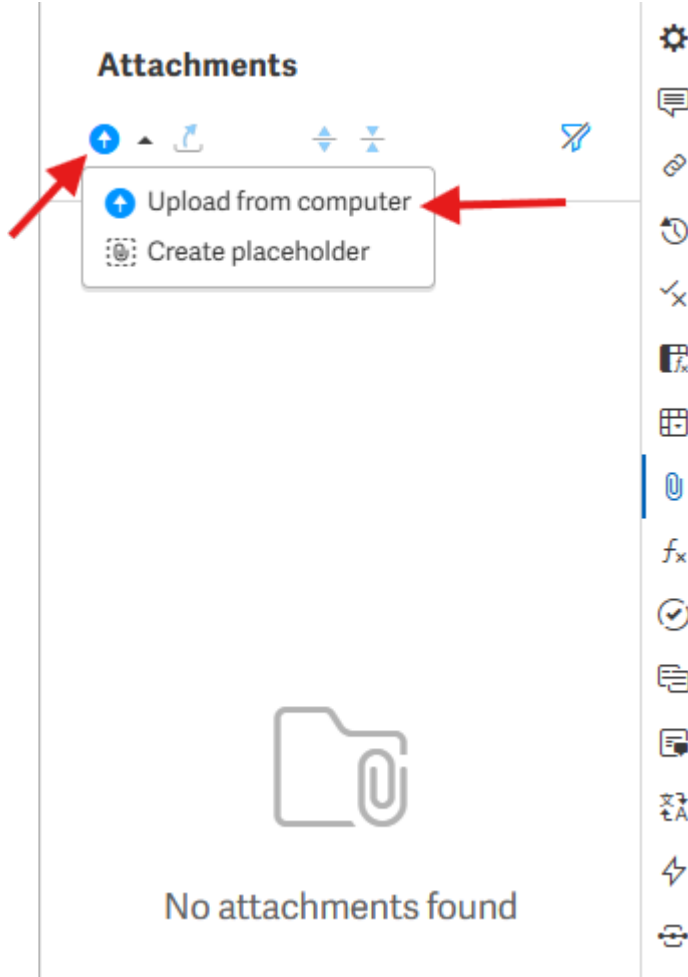
- Forms
 - Instructions
 - SEFA Definitions
 - SEFA Data
 - Loan
 - Reconciliation
 - Checklist**
 - Review Status
 - Checklist Review
 - New Review

A1	DEP Status
1	DEP Status
2	Not Started
3	ADMIN Status
4	Not Started
5	
6	
7	Prepared by:
8	Reviewed by:
9	Contact person:
10	Contact number
11	
12	
13	By certifying Item No. 19 of the State accurately completed in its entirety :
14	
15	
16	Submission:
17	The SEFA Checklist, along with the :
18	FederalReporting@myfloridacfo.com
19	
20	Checklist:
21	If entity checks "No" to Part A, it sh

- Then on the far right there is a tool box, you will click on the tool that looks like a paperclip.

Vertical toolbar with various icons including a paperclip, which is highlighted by a red arrow.

- Click on the small blue arrow drop down and choose Upload from computer.



- From there you will be able to browse your computer for the file you need to upload and then click open. **NOTE: Be SURE you are putting the correct naming convention down as the saved name for the upload document. They all combine and if you do not label them correctly it does cause confusion as to which document is which. So, for example you will use the naming convention Checklist_Signature_SEFA_2025 for the checklist signature page.**