



Community Impact Management

2018

Agency Training Manual

United Way of Dubuque Area
Tri-States

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Accessing e-CImpact

Requirements: All you need to access e-CImpact is a computer with an internet connection and current version of web browser (example: Internet Explorer, Firefox, Chrome, Safari)

To access the e-CImpact website, please go to

Direct access to the agency site is: <https://agency.e-cimpact.com/login.aspx?org=17175U>

Please bookmark the address to easily access e-CImpact at your convenience.

Agency Login

Now that you have accessed the Agency site, it is time to login.

For New Organizations:

Currently, the default agency username is the email address of the agency's **primary contact**.

The first time you login, the password will be pwd123. Once logged in you will be automatically prompted to change your password.

For Others: *if you do not know or remember your username and password, please contact your Jessica Bleile.*

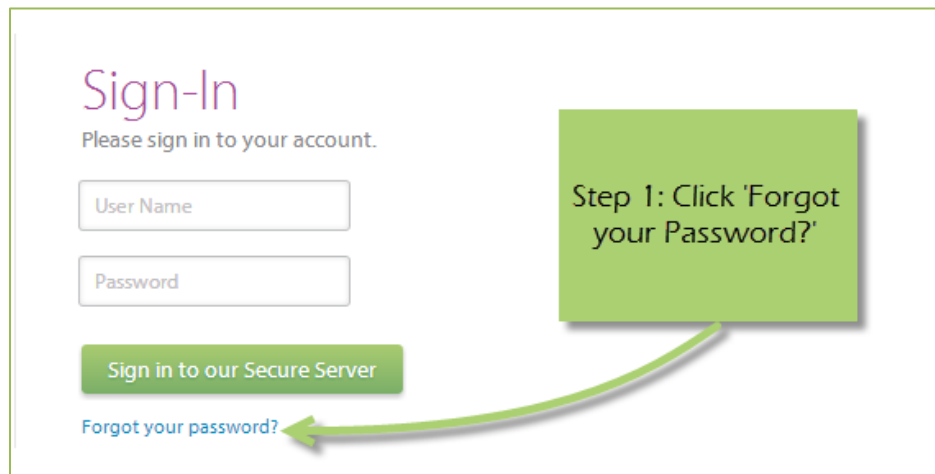
Step 1: Enter your username and password

Step 2: Click 'Sign In to our Secure Server' or use the enter key.

The screenshot shows the e-IMPACT Agency Login page. On the left is the e-IMPACT logo with the tagline 'Community Impact Management' and a link to the 'AGENCY SITE'. The main section is titled 'Sign-In' with the instruction 'Please sign in to your account.' It contains two input fields: 'User Name' and 'Password'. Below these is a green button labeled 'Sign in to our Secure Server' and a link for 'Forgot your password?'. On the bottom left, there is a section for 'New to e-IMPACT?' with a link to 'Don't have an account?' and a button to 'Click here to create a new Account'. Two green callout boxes with arrows provide instructions: 'Step 1: Enter Username and Password' points to the input fields, and 'Step 2: Click 'Sign in to our Secure Server'' points to the sign-in button. The footer includes security logos (Secured by Thawte, 2013-05-28), copyright information (© 2013 e-IMPACT, Community Impact Management), and a 'POWERED BY seabrooks' logo.

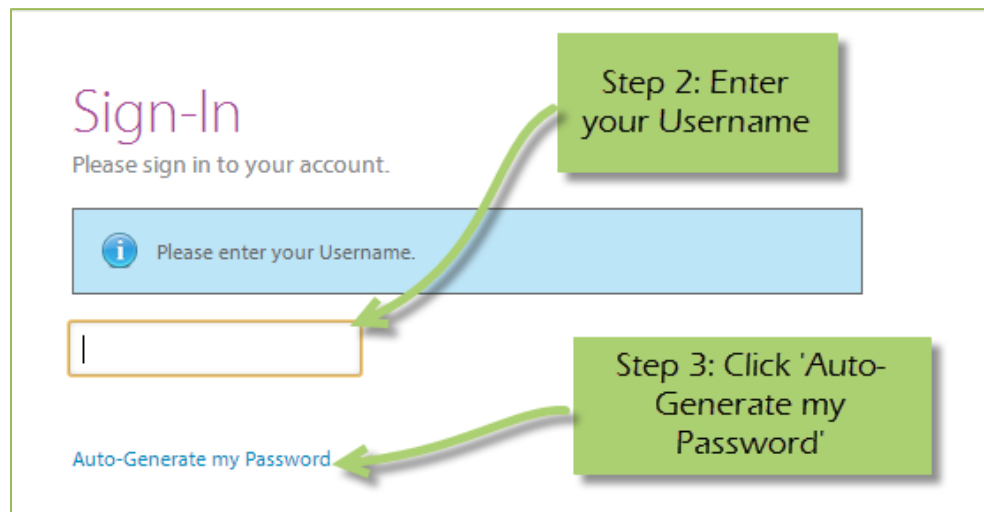
Forgot Password

Step 1: Click 'Forgot your password?' on the agency login page.



Step 2: Enter your username

Step 3: Select 'Auto-Generate my Password'



Step 4: Check your email, return to the login page and proceed to login. If you do not see the email in your inbox, be sure to check the 'junk' folder. If the email is not in either, please contact your Jessica Bleile.

Registering a New Agency

If you are not yet an United Way of Dubuque Area Tri-States Partner Agency, please proceed with site registration. Registration is required for all non-partner agencies.

Step 1: From the agency login page select 'Create new agency account'

The screenshot shows the e-IMPACT Community Impact Management Agency Site. The top left features the e-IMPACT logo and the text 'Community Impact Management' and 'AGENCY SITE'. The top right has a 'Sign-In' section with the text 'Please sign in to your account.' and fields for 'User Name' and 'Password', followed by a 'Sign in to our Secure Server' button and a 'Forgot your password?' link. The bottom left has a 'New to e-IMPACT?' section with a large green arrow pointing right. The bottom right has a 'Don't have an account?' section with the text 'Create an account to apply for available grants' and a 'Click here to create a new Account' button. A green callout box with an arrow points to the 'Click here to create a new Account' button, containing the text 'Step 1: Click here to create a new account'. The footer includes a 'Secured by Thawte' logo, the text 'Secured by Thawte © 2013 e-IMPACT, Community Impact Management', and 'POWERED BY seabrooks'.

Step 2: Please read all directions carefully, and then click 'Next' to continue with your registration process.

Letter of Intent / RFP pre-qualification process!

register and request an application for the current funding round. Please be ready to enter your agency's EIN, contact information, and mission application request requires that you successfully complete a pre-qualification test to determine your agency's eligibility.

Step 2: Read all
directions, then click
'Next'

Next →



[Cancel and Return to Login Page](#)

e-ClImpact™ Community Impact Management
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Step 3: Please enter all required information regarding your agency. Then proceed to the next page.

**EIN – the system will automatically validate your EIN, confirming you do not already have an e-ClImpact account. The system will also automatically enter any information linked to the EIN entered.*

Agency Registration

Fields marked with an * are required fields.

Please enter your Agency information in the fields below, including the agency Primary Contact information then select 'Next' at the bottom of the page to continue.

Agency Account Information

EIN: *

Agency Name:*

Website URL:

Account Information

Description:

Unit up to 750 characters (0 used).

Mission Statement:

Unit up to 750 characters (0 used).

Address

Address Type:*

Mailing

Address Line 1:*

Address Line 2:

City:*

State:*

Hawaii

Zip Code:*

Email Address

Email Address Type:*

Main

Email Address:*

Phone Number

Phone Number Type:*

Main

Phone Number:*

Primary Contact Information

Contact Type:*

Executive Director

First Name:*

Last Name:*

Job Title:

Preferred Login

Enter your password to ensure that you have entered it correctly. Your Password must be between 6 and 15 characters from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain any white-space.

Password

-- abcdefgh (invalid; contains only letters)

-- abc23 (invalid; less than 6 characters)

-- abcdefgh (invalid; contains only letters)

-- abc23 (invalid; less than 6 characters)

-- abcdefgh (invalid; contains only letters)

-- abc23 (invalid; less than 6 characters)

Please note what username and password you create.

Preferred User Name:*

Password:*

Confirm Password:*

Step 3: Enter required information, then click 'Next'

Previous

Next

Cancel and Return to Login Page

Step 4: Select a grant application you would like to apply for, and then continue to the next page.

Please review the list of currently available Grant Applications below.

Select a grant from the list to request an application. Some grants may require pre-qualification information be provided.

- ☐  **The Youth Philanthropy Project**
 The Youth Philanthropy Project is transitioning to a formal partnership between The Community Foundation and HandsOn Project. The purpose of this partnership is to further enhance the quality of the experience for participants and to further expand our reach to youth throughout the region.
- ☐  **The Best Grant Ever**
 You would be remiss if you did not apply for this....

[< Previous](#)

[Cancel and Return to Login Page](#)

Step 4: Select an Application, and then click 'Next'

[Next >](#)

Step 5: Please answer all qualification questions, and proceed to the next page.

If your agency passes the initial qualification questions, you will then move on to confirm your registration. In the event your agency does not qualify, you will be provided information on who to contact should you have any questions.

Agency Qualification Form

Customizable instructions can be entered here.

Section 1

Does your organization have a 501c3 rating? (answer 'Yes' to Qualify).....

[< Previous](#)

[Cancel and Return to Login Page](#)

Step 5: Answer Qualification Question, then Click 'Next'

[Next >](#)

Step 6: Review all agency information entered, and then click 'Confirm Registration'

Please Review the information below for accuracy.

EIN: 567774568

Agency Name: 123 Test Agency

Additional Agency Account Information Summary

Description:

Accredited: ☐ Yes ☒ No

Mission Statement:

Agency Information Summary

Address: 123 Main Street
City, Illinois
45654
(Mailing)

Email Address: info@email.com (Main)

Phone Number: (555) 666-3333 (Fax)

Primary Contact Information Summary

Contact Name: me me (Executive Director)

Preferred Login

Username: 123agency

Password: *****

Request Summary

The Youth Philanthropy Project

The Youth Philanthropy Project is transitioning to a formal partnership between The Community Foundation and HandsOn Project. The purpose of this partnership is to further enhance the quality of the experience for participants and to further expand our reach to youth throughout the region.

Step 6: Review your agencies information, then 'Complete Registration'


[Cancel and Return to Login Page](#)

Complete Registration ➔

Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email.

To access the rest of the e-CImpact Agency Training Manual please go to the resource center located in the lower left side of the agency homepage.

To continue to view the e-Clmpact Agency Training Manual please go to your 'Resource Center'



Family Service Agency
[Home](#)
[Agency Profile](#)
[Additional Info](#)
[Users](#)
[Mission Statement](#)
[Project Profiles](#)

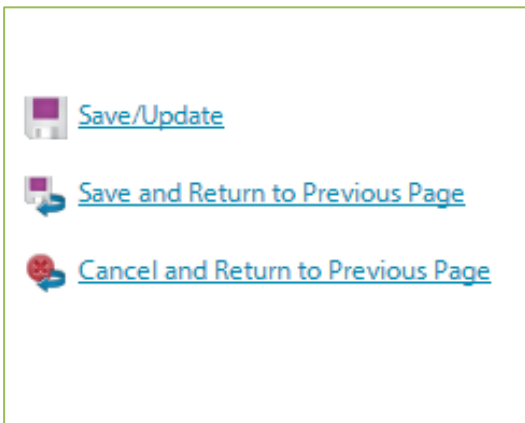
Schedule
[Meeting Archive \(1\)](#)
[On-Site Visits Archive \(1\)](#)

[Request Grant Application](#)

Resource Center
[Agency Reports \(1\)](#)
[e-Clmpact Agency Training Manual \(1\)](#)

Common Navigation

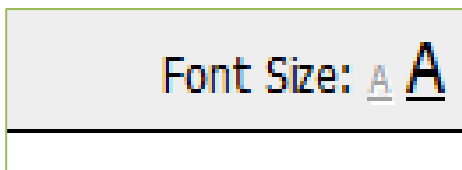
The navigation links in e-Clmact are consistent throughout the site.



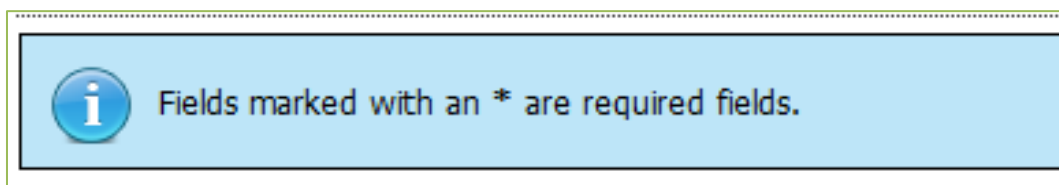
Save/Update: Refreshes the page while saving any changes made to your data.

Save and Return to Previous Page: Returns you to the page last visited while saving any changes made to your data.

Cancel and Return to Previous Page: Will return you to the previous page and will NOT save any changes made to your data.



Changing the Font Size: Located in the upper right hand corner of the agency site, click the large 'A' to increase the font size. Click the smaller 'A' to decrease the font size.



Agency Site Home Page

From the home page you will be able to access all parts of the agency site. There are four basic sections:

1. Account Management
2. Agency Information
3. News, Events, and Calendars
4. Applications and Resource Center

The screenshot shows the e-IMPACT Agency Site Home Page. At the top, a header bar displays the user's name "Hello, Rose Ogihara" and links for "Change Password", "User Profile", and "Signout", along with a session time of 16:27. The "e-IMPACT" logo is prominently displayed on the left. The page is organized into several sections, with green callout boxes and arrows highlighting the four main areas mentioned in the text:

- 1. Account Management:** A green box labeled "1. Account Management" points to the top right of the page.
- 2. Agency Information:** A green box labeled "2. Agency Information" points to the left sidebar menu.
- 3. News, Events, and Calendars:** A green box labeled "3. News, Events, and Calendars" points to the "New Meeting" and "Calendar" sections.
- 4. Application and Resource Center:** A green box labeled "4. Application and Resource Center" points to the "Request Grant Application" and "Resource Center" sections.

The left sidebar menu includes links for "Home", "Agency Profile", "Additional Info", "Users", "Mission Statement", "Project Profiles", "Schedule", "Current Meeting (1)", "Meeting Archive (1)", "On-Site Visits Archive (1)", "Request Grant Application", "Resource Center", "Agency Reports (1)", and "e-IMPACT Agency Training Manual (1)".

The main content area features a "New Meeting" section with a link to "Application Training - Agency Site" and a "Calendar" section for February 2013. The calendar shows the following dates:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

The "Today's Schedule" for Thursday, February 14, 2013, shows "None Scheduled". The "Schedule for February" also shows "None Scheduled".

The "Our Work through Initiatives" section includes updates on the "African American Initiative" and the "Immunization Initiative".

A vertical "FEEDBACK" button is located on the right side of the page.

[Account Management](#)

[Change Password](#) | [User Profile](#) | [Signout](#) (Session time remaining: 17:44)

Change Password

Step 1: To change your password, select 'Change Password'

Step 2: Enter the old password

Step 3: Then enter the new password two times.

Password Rules:

- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the groups of alpha, numeric, or special characters.
- Characters NOT accepted are: ", % or any white-space.


User Profile

The User Profile area is where you are able to add, edit, or delete any of your information including: primary contact, basic information, email addresses, phone numbers, and mailing addresses. Users may also choose to be 'Included in all Emails'.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the check box 'Primary?'. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected.

Active: Make sure your account is 'Active'. Once a user is deactivated you will need to contact Jessica Bleile to reactivate the user account.

Contacts

 Fields marked with an * are required fields.

☒ Primary?

☒ Include in all Emails?

☒ Active?

Type:*

Executive Director

Prefix:

First Name:*

Alexis

Middle Initial:


Last Name:*


Johnson


Suffix:

Company:

Job Title:

 [Save/Update](#)

 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)

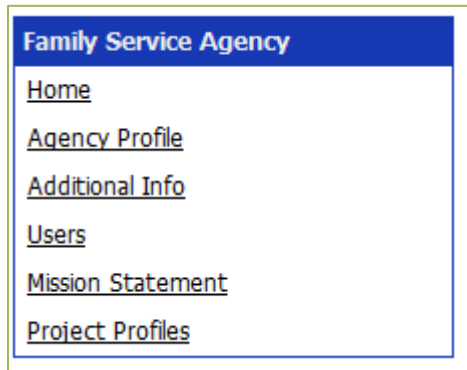
Enter any necessary information, and then click 'Save/Update'.

Signout

Users should 'Signout' of e-ClImpact to ensure the security of their data. Once signed out of e-ClImpact, press the 'X' in the upper right hand corner of your browser to close the window.

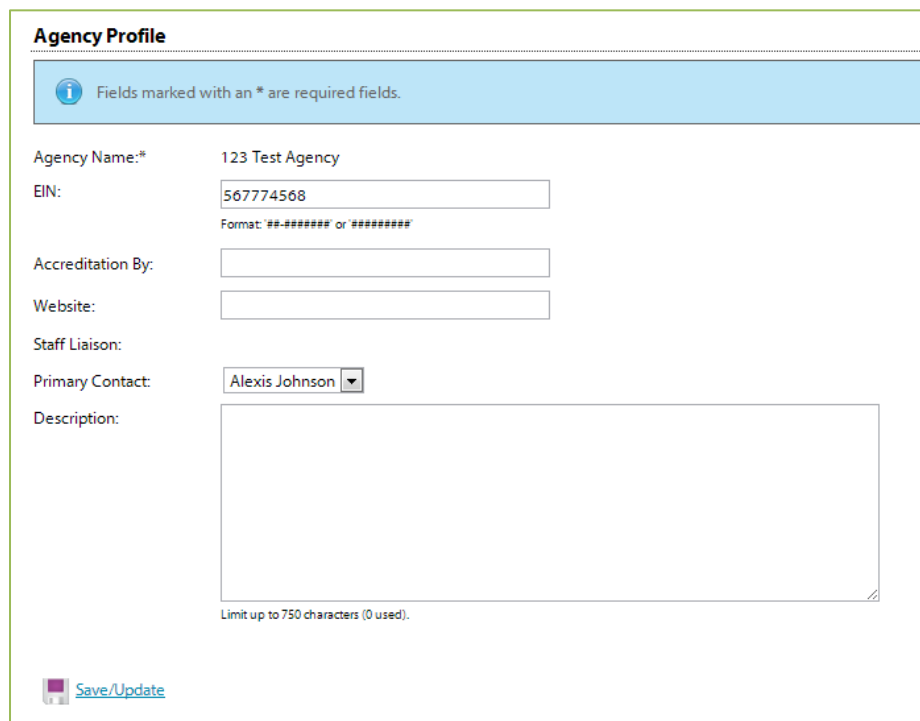
[Agency Information](#)

The Agency Information section is where account information, contacts, statements (mission / vision / agency) and program information is housed. From this section you will be able to update your address(es), or contact information.



[Agency Profile](#)


The profile page is where all agency specific information is housed and can be updated. This includes the basic information – agency name, EIN, staff contact, primary contact, website, etc.

A screenshot of the "Agency Profile" form. The form has a title "Agency Profile" at the top. Below the title is a light blue banner with an information icon and the text "Fields marked with an * are required fields." The form contains several fields: "Agency Name:*" with the value "123 Test Agency"; "EIN:" with the value "567774568" and a format hint "Format: '##-####' or '#####'"; "Accreditation By:"; "Website:"; "Staff Liaison:"; "Primary Contact:" with a dropdown menu showing "Alexis Johnson"; and "Description:" with a large text area. At the bottom of the form is a "Save/Update" button. A note at the bottom of the description field says "Limit up to 750 characters (0 used)."


Account name(s), address(es), phone number(s) and email address(es)

You may also add, edit or delete account names, address, phone numbers and email addresses. Agencies are able to have multiple records for each section.


Account Names

Type	Account Name	Active?	Actions
 Add New Account Name			


Addresses

Type	Address	Primary?	Active?	Actions
Mailing	123 Main Street, City, IL 45654, U.S.A.	Yes	Yes	Edit Delete
 Add New Address				

Phone Numbers

Type	Phone Number	Primary?	Active?	Actions
Fax	(555) 666-3333	Yes	Yes	Edit Delete
 Add New Phone Number				

Email Addresses

Type	Email Address	Primary?	Active?	Actions
Main	info@email.com	Yes	Yes	Edit Delete
 Add New Email Address				

‘Account Names’ is a place for any other names for your agency, or if your agency name is abbreviated you may place the legal name here.

Agency Contacts

- ☐ Confidential?
- ☐ Primary?
- ☒ Active?

When adding a new record, or updating existing records, be sure to select 'Active' appropriately.

'Primary' can only be selected for one record.

To view all agency contacts – click 'Contacts' from the agency information section on the homepage.



From this area you will be able to see anyone who is currently listed as a contact at your agency, as well as add, edit, deactivate or delete an agency contact.

Contacts					
Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Exec		Yes		Edit
<div><div> Add New</div><div>Click here to Add New contacts</div><div>Click here to 'Edit' existing contacts</div></div>					


The agency contact profile page is similar to the user profile and contains the same information.

- Name and preference
- Email addresses
- Phone Numbers
- Addresses


Request a Login: Once a new contact has been created, you are able to request a login for this user.

Step 1: Click 'Request a Login'

Contacts					
Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Executive Director		Yes	123agency	Edit
Rose Ogihara	Grant Writer			Request a Login	Edit Delete

 [Add New](#)

Step 1: Request a Login



Step 2: Enter username and password.

**A contacts email address is commonly used as the username due to email addresses being unique.*

Request a Login Account for Rose Ogihara

Enter a password and then retype the password to ensure that it has been entered correctly. Your new password must be between 6 and 15 characters in length and contain at least 1 character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain the following characters: ", %, or any white-space.

Password Examples:

- abcdefg2 (valid, contains letters and numbers)
- pa\$\$word (valid, contains letters and numbers)
- 1234567# (valid, contains letters and a special character)
- abcdefgh (invalid, contains only letters)
- abc23 (invalid, less than 6 characters)

Contact Type: Grant Writer

Contact Name: Rose Ogihara


Username:*


Password:*

no value

Confirm Password:*

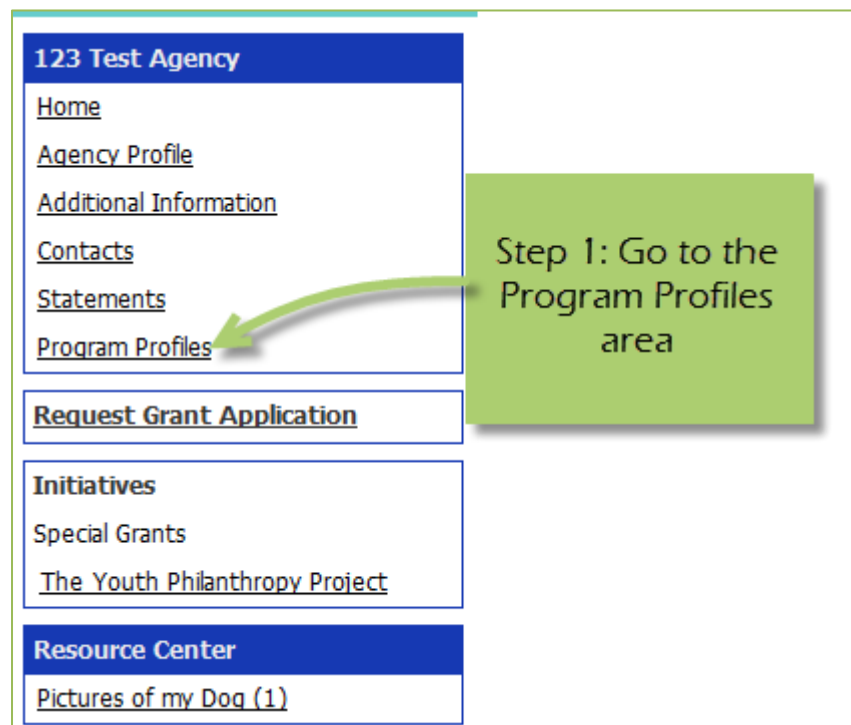
no value

 [Save/Update](#)

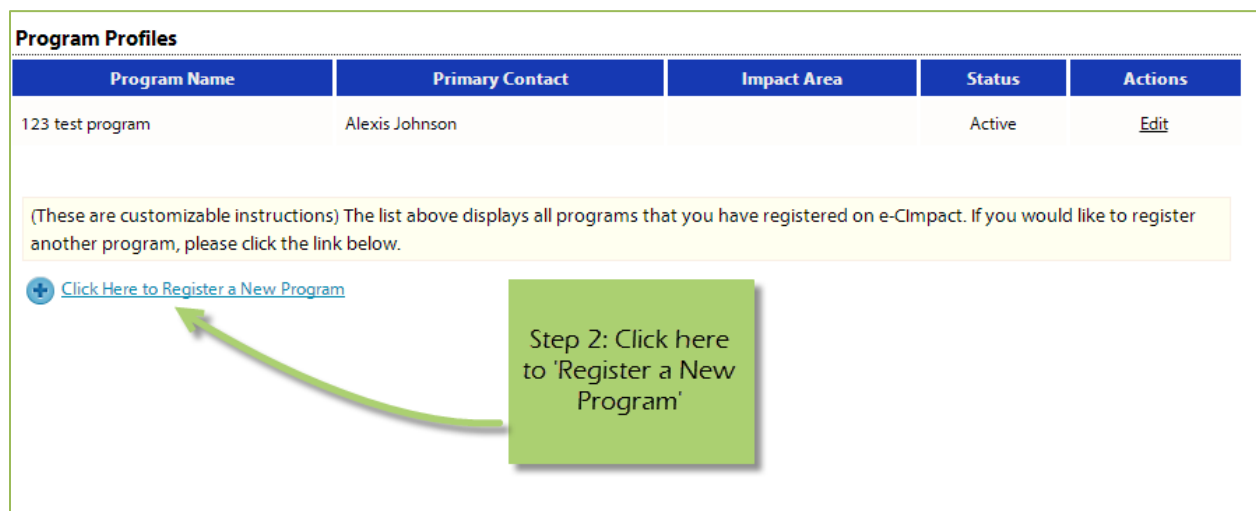
 [Return To Previous Page](#)

Registering a New Program

Step 1: Go to the programs area by selecting 'Program Profiles'



Step 2: Select 'Click Here to Register a New Program'



Step 3: Enter all required program information, and then select 'Save / Complete Registration'

Program Registration

Enter the program / project name and basic information below.

*Fields marked with an * are required fields.*

Program / Project

Program Name:*
Limit up to 150 characters (0 used).

Primary Contact:

[Save/Complete Registration](#) [Cancel and Return to Previous Page](#)

Step 3: Enter required information, then 'Save / Complete Registration'

After selecting 'Save/Complete Registration' you will be directed to the program profiles page, here you will see a validation message stating that you have successfully registered your program.

Updating Program Information

Step 1: To edit a program, go to the program profiles area.

Step 2: Select 'Edit' next to the desired program.

Program Profiles

Program Name	Primary Contact	Impact Area	Status	Actions
123 test program	Alexis Johnson		Active	Edit

(These are customizable instructions) The list above displays all programs that you have registered on e-CImpact. If you would like to register another program, please click the link below.

[Click Here to Register a New Program](#)

Step 2: Select 'Edit'

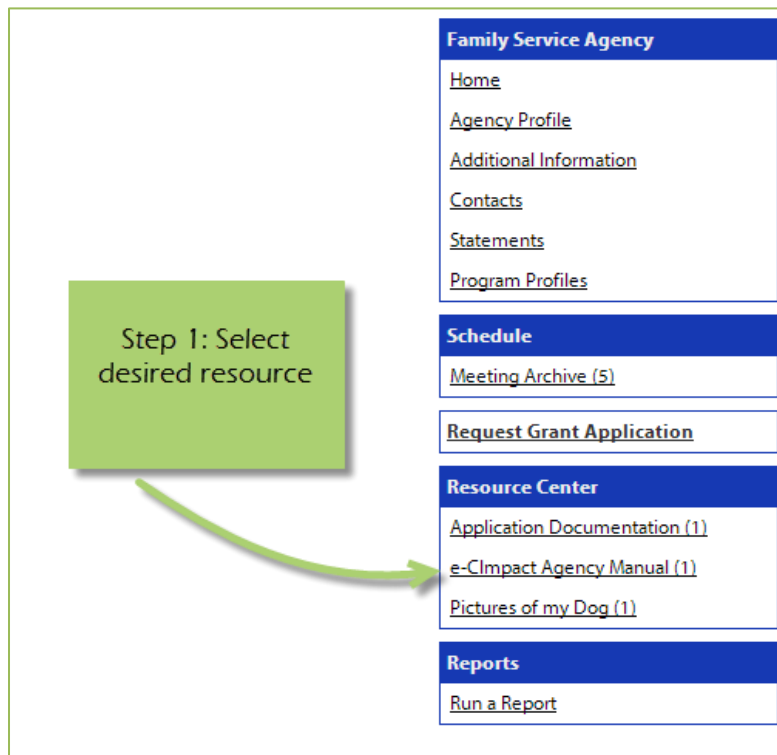
From here you will be able to update information needed.

Resource Center

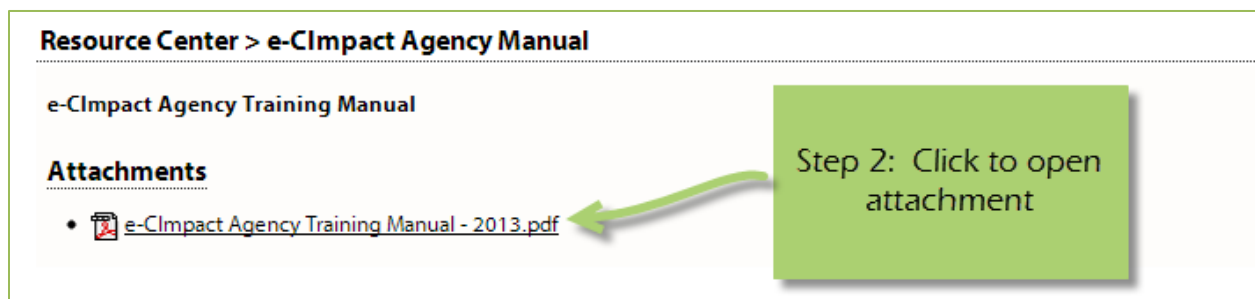
The agency resource center is where you will be able to find any documents you may need to reference from . The resource center is located in the lower half of the left hand navigation.

Accessing Resources

Step 1: Select desired resource item



Step 2: Click on the attachment link to open



The Basics of your Applications / Grant Process

Accessing Application / Grant Process

Step 1: Choose the application or grant process from the list located in the left hand navigation.



Form Status

This page works much like a check list. You are able to easily see how much of your application you have submitted.

The screenshot shows a progress bar at the top with four stages: Not Started (highlighted in red), In Progress, Ready To Submit, and Submitted. Below the bar is a table with columns: Item (* indicates Required Item), Last Updated, Status, and Action. The table lists several items, all with a 'Not Started' status. A green callout box points to the progress bar and the Status column, explaining their functions.

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation		Not Started	
Agency Information*		Not Started	
Alternative Education Program		Not Started	<input checked="" type="checkbox"/> Include?
Program Information*		Not Started	
Demo Logic Model Navigation		Not Started	
Program Budget*		Not Started	
Program Demographics*		Not Started	
Copy of Program Logic Model		Not Started	

The top bar is the Overall Application status.

The Status column is for the individual forms.

Not Started: When the application or form is in not started status, it means that no data has been entered yet.

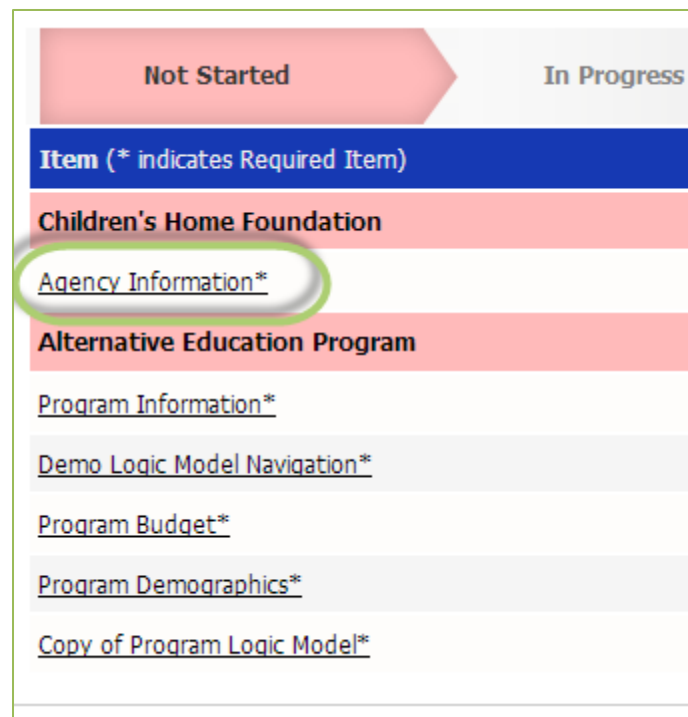
In Progress: If your form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

Ready to Submit: Once all forms are marked completed, your top bar should move to 'Ready to Submit'. At this stage you should review any information entered, then move on to submit your application.

Submitted: When an application is in submitted status, you will no longer be able to make changes to the information on the forms. If you submit, and find you need to make an edit, you should contact your Jessica Bleile.

Entering Information

To begin filling out your application click on the desired form:

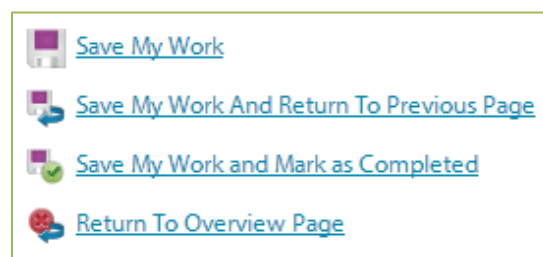


The screenshot shows a web interface for entering information. At the top, there are two tabs: "Not Started" (highlighted in red) and "In Progress". Below the tabs is a table with a blue header row labeled "Item (* indicates Required Item)". The table contains several rows, each with a red header and a white body. The first row is "Children's Home Foundation". The second row is "Agency Information*", which is circled in green. The third row is "Alternative Education Program". The fourth row is "Program Information*". The fifth row is "Demo Logic Model Navigation*". The sixth row is "Program Budget*". The seventh row is "Program Demographics*". The eighth row is "Copy of Program Logic Model*".





Item (* indicates Required Item)
Children's Home Foundation
<u>Agency Information*</u>
Alternative Education Program
<u>Program Information*</u>
<u>Demo Logic Model Navigation*</u>
<u>Program Budget*</u>
<u>Program Demographics*</u>
<u>Copy of Program Logic Model*</u>

Save Options

After entering information on your forms, you have multiple save options.



The screenshot shows a list of four save options, each with a small icon and a text link. The first option is "Save My Work" with a floppy disk icon. The second option is "Save My Work And Return To Previous Page" with a floppy disk and back arrow icon. The third option is "Save My Work and Mark as Completed" with a floppy disk and checkmark icon. The fourth option is "Return To Overview Page" with a red circle and back arrow icon.

-  [Save My Work](#)
-  [Save My Work And Return To Previous Page](#)
-  [Save My Work and Mark as Completed](#)
-  [Return To Overview Page](#)

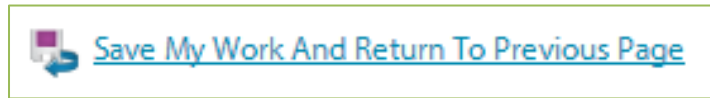
Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

Save My Work and Mark as Completed: This option is for when you have entered and reviewed your information and are ready to turn it in.

Switching Forms

There are two ways to switch forms within an application:

First: When you are finished with one form, click on 'Save My Work and Return to Previous Page', and then select the next form.



Second: You can use the 'Switch Forms' option, located in the upper right hand corner.

Step 1: Click 'Switch Forms' to view the list of available forms.

The screenshot shows the top portion of a web form titled 'Grant Process'. Below the title is a sub-header 'Other Grant Process - 2013 Application' followed by 'Children's Home Foundation' and 'Status: Not Started'. A green callout box with the text 'Step 1: Click here to see a list of other forms available' has an arrow pointing to a blue button labeled 'Switch Forms' in the top right corner. Below the status is a section titled 'Agency Information' with a light blue box containing an information icon and the text 'Fields marked with an * are required fields.' At the bottom, a yellow box contains a note: '***NOTE: Remember to upload the documents required as set forth in the Financial Checklist section below in the space provided on the Agency Form List/Summary page.'

Step 2: Click on the form you would like to move to.

The screenshot shows the 'Switch Forms' dialog box overlaid on the 'Grant Process' form. The dialog box has a blue header with the text 'At any time you may select another form to work on. Your work on this form will be saved automatically.' and a close button (X). Below the header is a table with two columns: the form name and its status. The first row is highlighted in pink. A green callout box on the left contains the text: 'The Form you are currently on is not clickable. All changes made to your current for are automatically saved. The other forms are available to choose.' with arrows pointing to the 'Agency Information*' row in the table and the 'Switch Forms' button in the background form.

Children's Home Foundation	Not Started
Agency Information*	Not Started
Alternative Education Program	Not Started
Program Information*	Not Started
Demo Logic Model Navigation*	Not Started
Program Budget*	Not Started
Program Demographics*	Not Started
Copy of Program Logic Model*	Not Started

Attachments

Uploading Attachments

Excepted file types for uploading documents:

- Accepted file types: pdf, doc, docx, ppt, pptx, xls, xlsx, gif, jpg, jpeg, bmp, tif, rtf, and txt.
- Combined maximum file size is 8MB.

Step 1: Open documents form

Application Status Print / Review Options

Not Started In Progress Submitted

Item (* indicates Required Item)	Last Up	Action
Children's Home Foundation		
Agency Information*		
Required Documents		
After School Program	Not Started	<input checked="" type="checkbox"/> Include?

The Attachments form displays the same as other forms.

Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.

Required Documents

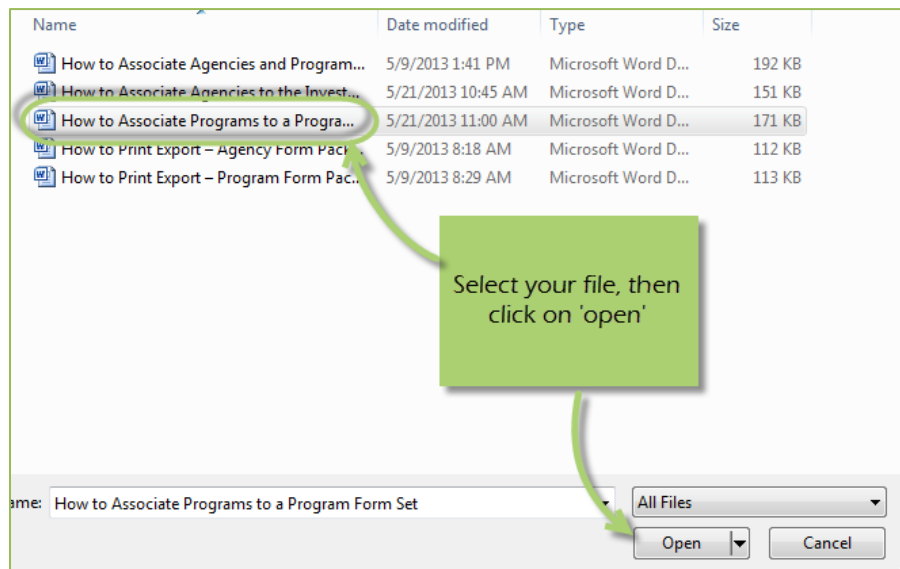
Description	File	Last Modified	Action
501c3* Please upload your current 501c3. Thank you	<input type="button" value="Choose File"/> No file chosen		

[Save/Upload Attachment\(s\)](#)

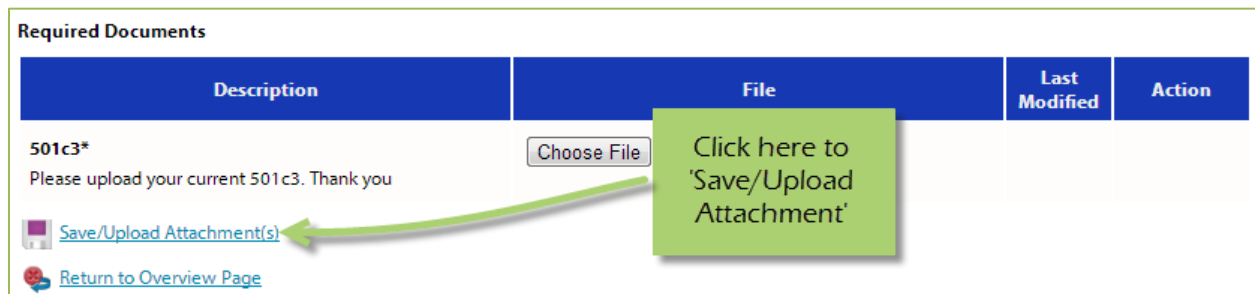
[Return to Overview Page](#)

Click here to 'Choose File'

Step 3: Browse your computer, and select the desired document.

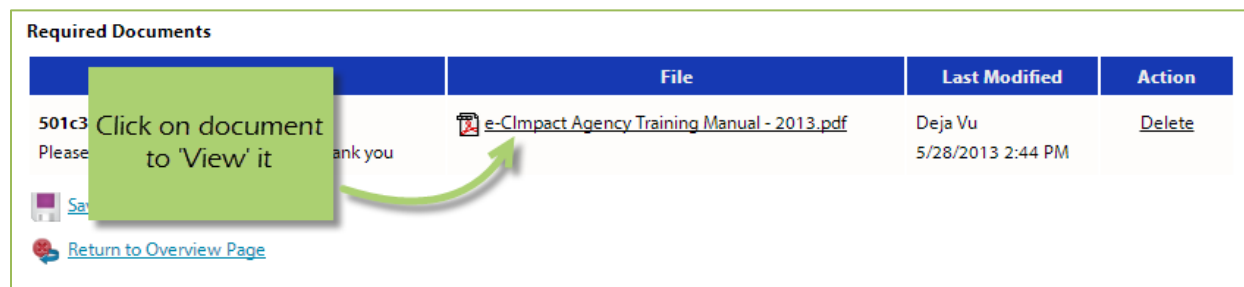


Step 4: 'Save/Upload Attachment(s)'



Viewing Attachments

Step 1: Click on the document name to download and open it.



Deleting Attachments

In the event the wrong document was uploaded you may need to delete your attachment.

Step 1: Open documents form

Application Status **Print / Review Options**

Not Started In Progress Submitted

Item (* indicates Required Item)	Last Up	Action
Children's Home Foundation		
Agency Information*		
Required Documents		
After School Program	Not Started	<input checked="" type="checkbox"/> Include?

Step 2: Select 'Delete' next to the desired document

Required Documents

Description	F	Last Modified	Action
501c3* Please upload your current 501c3. Thank you	e-CImpact Agency Train	Deja Vu 5/28/2013 2:44 PM	Delete

[Save/Upload Attachment\(s\)](#)

[Return to Overview Page](#)

Step 3: Confirm you would like to delete this attachment

The page at https://agency.e-cimpact.com says:

Are you sure you want to delete this attachment?

OK Cancel

You are now able to upload the correct attachment.

Submitting Application

Mark Forms 'Complete / Ready to Submit'

In order to submit your application, you must mark ALL forms 'Completed / Ready to Submit'

Step 1: Open form

Application Status			Print / Review Options
Not Started	In Progress	Ready To Submit	Submitted
Item (* indicates Required Item)	Item ID	Status	Action
Children's Home Foundation	5	In Progress	
Agency Information*	D 5/22/2013 2:56 PM (CST)	In Progress	
Required Documents	Deja Vu 5/22/2013 1:55 PM (CST)	Completed / Ready To Submit	
After School Program	5/22/2013 2:08 PM (CST)	Completed / Ready to Submit	<input checked="" type="checkbox"/> Include?

Step 2: Review information, then 'Save My Work and Mark as Completed'


[Save My Work](#)
 [Save My Work And Return To Previous Page](#)
 [Save My Work and Mark as Completed](#)
 [Return To Overview Page](#)

After review - Click here to mark form completed

Complete these steps for each form until you have completed the entire application.



Submit!

Once all forms are 'Completed / Ready to Submit', the 'submit this application now' option will appear at the top of the page.

 Your Application is now Ready To Submit! Please verify all the information ...

Application Submission Details
Send Submission Confirmation Email To:*
Submitted By:
Submit This Application Now!

Application Status Print / Review Options
Not Started In Progress **Ready To Submit** Submitted

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation	5/22/2013 1:55 PM (CST)	Completed / Ready to Submit	
<u>Agency Information*</u>	Deja Vu 5/22/2013 1:55 PM (CST)	Completed / Ready to Submit	
<u>Required Documents</u>	Deja Vu 5/22/2013 1:55 PM (CST)	Completed / Ready to Submit	
After School Program	5/22/2013 2:08 PM (CST)	Completed / Ready to Submit	<input checked="" type="checkbox"/> Include? 
<u>Program Information*</u>	Deja Vu 5/22/2013 2:06 PM (CST)	Completed / Ready to Submit	
<u>Demo Logic Model Navigation*</u>	Deja Vu 5/22/2013 2:07 PM (CST)	Completed / Ready to Submit	

Step 1: Confirm the email address to send the confirmation message.

Application Submission Details
Send Submission Confirmation Email To:*
Submitted By:
Submit This Application Now!

Confirm email address, make changes if necessary

Step 2: Select 'Submit This Application Now!'


Application Submission Details
Send Submission Confirmation Email To:*
Submitted By:
Submit This Application Now!

Select 'Submit This Application Now!'

Now that you have successfully submitted your application, you will see everything is now in submitted status.

Grant Process

Other Grant Process - 2013 Application
Children's Home Foundation
This is the Description - and this displays on the Agency Site in the Investment Process!!

 Thank you... application will be review... indicate... funding to be ...

Application Submission Details
Send Submission Confirmation Email To:* doreen@seabrooks.com
Submitted By: Deja Vu on 5/22/2013 at 3:02 PM (CST)

Application Status



Print / Review Options

Not Started

In Progress

Ready To Submit

Submitted

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation	5/22/2013 3:02 PM (CST)	Submitted	
<u>Agency Information*</u>	Deja Vu 5/22/2013 3:02 PM (CST)	Submitted	
<u>Required Documents</u>	Deja Vu 5/22/2013 1:55 PM (CST)	Submitted	
After School Program	5/22/2013 3:02 PM (CST)	Submitted	<input checked="" type="checkbox"/> Include? 
<u>Program Information*</u>	Deja Vu 5/22/2013 3:02 PM (CST)	Submitted	
<u>Demo Logic Model Navigation*</u>	Deja Vu	Submitted	

Please note: Once an application is in submitted status you will be able to view the information entered. You will not be able to make any changes to the information.

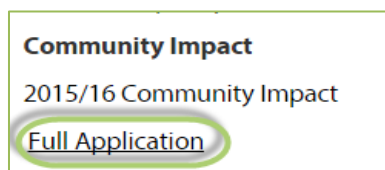
Printing Options

There are different levels you may print:

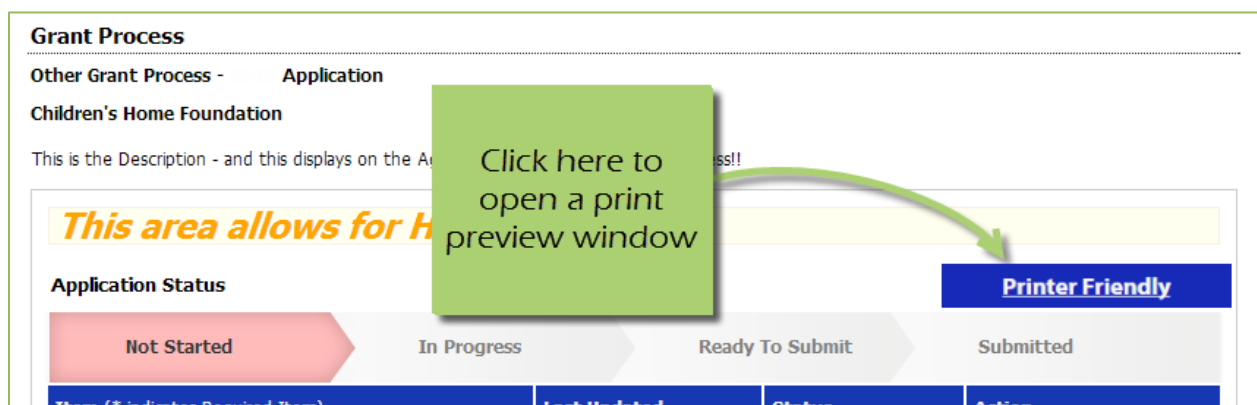
- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet– This will print all forms that are program specific.
- Individual Form – This will print the individual form.

The Entire Application

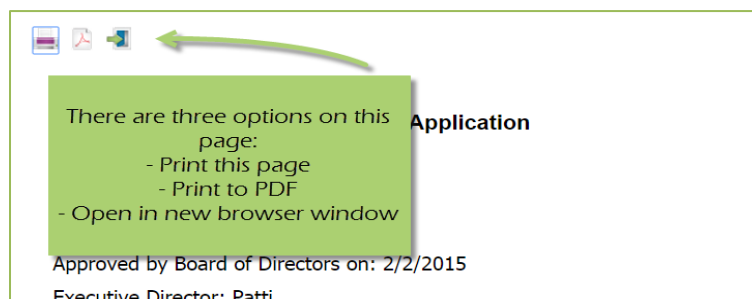
Step 1: Open the application by clicking on it in the left hand navigation.



Step 2: Click on 'Print/Review Options' box in the upper right hand corner of the application main page.

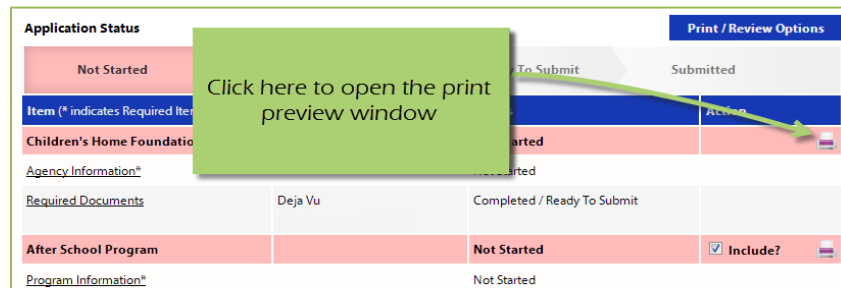


Step 3: Select the option you would like to use, continue on to print.

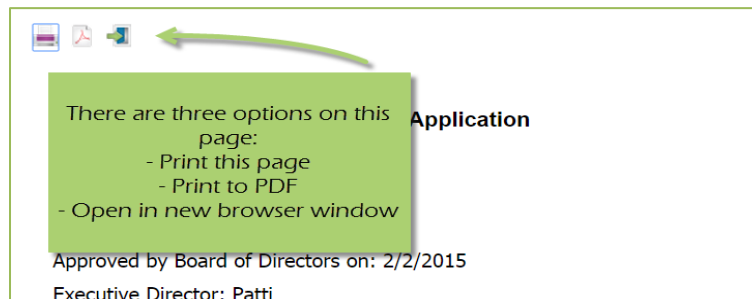


Agency Packet

Step 1: From the application main page, click on the 'Print' icon, in the agency section of the list grid under the action column.



Step 2: Select the 'Print' option you would like to use, continue on to print.



Program Packet

Step 1: From the application main page, click the 'print' icon next to the desired program you would like to print. Then choose which print option to use.

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation		Not Started	
Agency Information*		Not Started	
Required Documents	Deja Vu	Completed / Ready To Submit	
After School Program		Not Started	<input checked="" type="checkbox"/> Include?
Program Information*		Not Started	
Demo Logic Model Navigation*		Not Started	
Program Budget*		Not Started	
Program Demographics*		Not Started	
Copy of Program Logic Model*		Not Started	
Alternative Education Program		Not Started	<input checked="" type="checkbox"/> Include?
Program Information*		Not Started	
Demo Logic Model Navigation*		Not Started	

Program Packets are specific to each program listed

Click the print icon to see Print / Export options for the Program Packets

Individual Forms

Step 1: From the application main page, open the form you would like to print.

The screenshot shows the 'Application Status' page with a progress bar at the top indicating stages: Not Started, In Progress, Ready To Submit, and Submitted. Below the progress bar is a table with columns: Item (* indicates Required Item), Last Updated, and Action. A green callout box with the text 'Click here to open form' points to the 'Children's Home Foundation' row. The table also includes links for 'Agency Information*', 'Required Documents', and 'Program Information*'. The 'After School Program' row shows a status of 'Not Started' and an 'Include?' checkbox.

Item (* indicates Required Item)	Last Updated	Action
Children's Home Foundation		
Agency Information*		
Required Documents	Deja Vu	Completed / Ready To Submit
After School Program		Not Started <input checked="" type="checkbox"/> Include?
Program Information*		Not Started

Step 2: In the lower right hand corner of your form are the option for printing.

The screenshot shows the bottom of a form with several links: 'Save My Work', 'Save My Work And Return To Previous', 'Save My Work and Mark as Complete', and 'Return To Overview Page'. A green callout box with the text 'Click here to print the current form' points to the 'Printer Friendly' link, which is accompanied by a printer icon.

[Printer Friendly](#)

Questions and Answers

There are two ways to access 'Questions and Answers'.

In the Application – a new tab will be added to the application if a volunteer has a question regarding that specific application.

2010-2012 Annual Application - 1) Request for Funding
Children's Home Foundation

Funding: Funded programs will receive a final year of funding satisfactory program performance. Process: Applications will be reviewed by the leadership of the Community Impact Division. United Way funds will be distributed.

The Questions and Answers tab will only display if there are questions that have been asked regarding the specific application

Application Questions and Answers (1)

✓ Your application for funding has been successfully submitted. It will be reviewed by a committee of community volunteers.
Thank you.

Application Submission Details

In the left hand Navigation, at the bottom of the investment/application list – All questions and answers will be listed.

Request Grant Application

Community Grants

2008-10 United Way RFP

Initial Application

2010-2012 Annual Application

1) Request for Funding

2) Mid-Year Reporting

2012 - 2014

1) Letter of Intent

2012 Focus Area Grants

1) Application

Grant Process

Other Grant Process

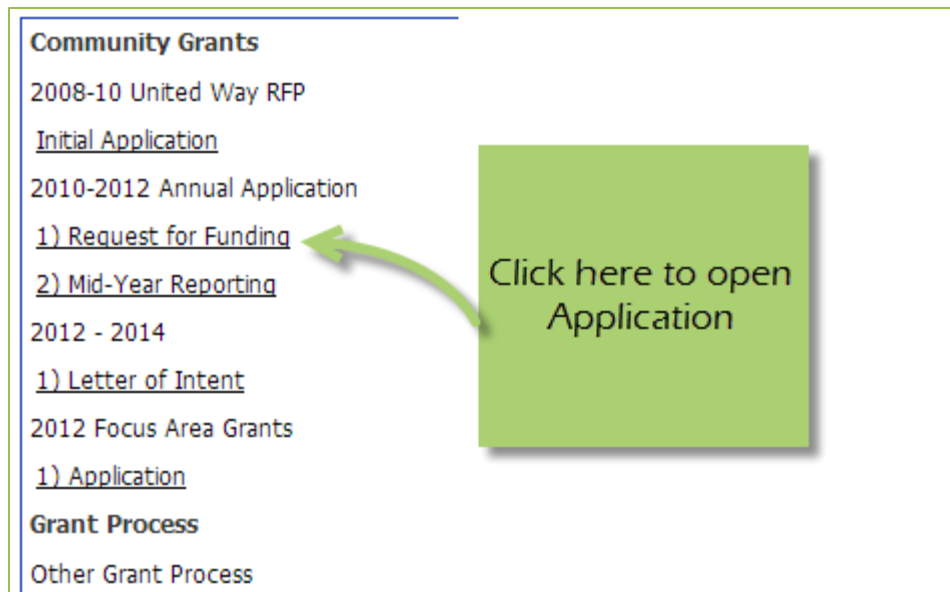
2013 Application

Questions and Answers

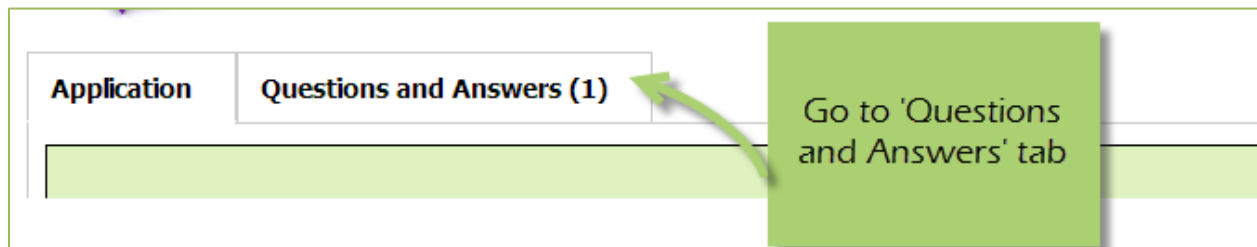
Click here to see ALL questions and answers

Responding to a Question – In the Application

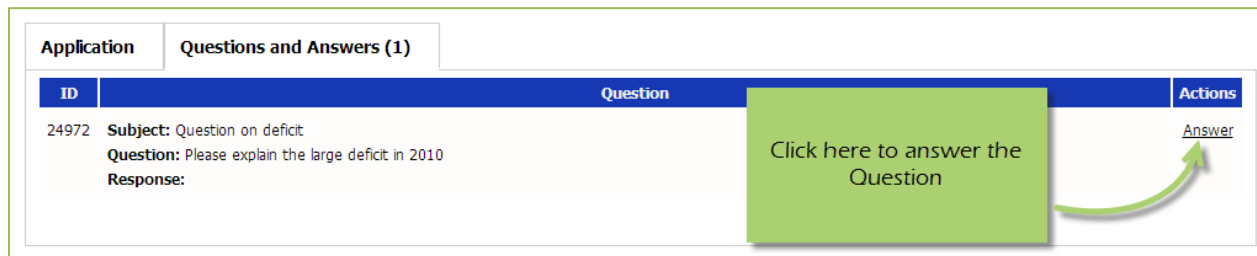
Step 1: Open the application



Step 2: Go to 'Questions and Answers' tab



Steps 3: Select 'Answer' for desired question



Step 4: Enter your answer to the question, then 'Save and Return to Previous Page'

Question ID: 24972
Program: Alternative Education Program

Question on deficit

Please explain the large deficit in 2010

Type your answer here, then click 'Save and Return'

Limit up to 3000 characters (0 used).

[Save and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Once the answer is saved, it is approved by your Jessica Bleile, and then displays to the volunteers reviewing your application.

Responding to a Question – From the overall ‘Questions and Answers’ list

Step 1: Click on ‘Questions and Answers’ in the left hand navigation

Request Grant Application

Community Grants

2008-10 United Way RFP

Initial Application

2010-2012 Annual Application

1) Request for Funding

2) Mid-Year Reporting

2012 - 2014

1) Letter of Intent

2012 Focus Area Grants

1) Application

Grant Process

Other Grant Process

2013 Application

Questions and Answers

Click here to see ALL questions and answers

Step 2: Click ‘Respond’ next to desired question

Questions and Answers

ID	Investment	Program	Question	Action
24972	Community Grants - 2010-2012 Annual Application - 1) Request for Funding	Alternative Education Program	Subject: Question on deficit Question: Please explain the large deficit in 2010 Response:	Respond

Click here to respond to the question

[Export Questions and Answers To Adobe PDF](#)

Step 3: Enter your answer to the question, then 'Save and Return to Previous Page'

Question ID: 24972
Program: Alternative Education Program

Question on deficit
Please explain the large deficit in 2010

Type your answer here, then click 'Save and Return'

Limit up to 3000 characters (0 used).

[Save and Return to Previous Page](#)
[Cancel and Return to Previous Page](#)

Print / Export - Questions and Answers

Currently this can only be done through the overall 'Questions and Answers' area

Questions and Answers					
ID	Investment	Program	Subject	Question	Action
24972	Community Grants - 2010-2012 Annual Application - 1) Request for Funding	Alternative Education Program	Subject Question Response	deficit in 2010	Respond
<div>Click here to Export Questions to PDF</div> <div>Export Questions and Answers To Adobe PDF</div>					