

New Agency Training Manual



Managem



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Welcome – Note to Agency Administrators

Welcome to the e-CImpact Agency Training Manual. We have created this manual for your organization's use. This training manual will help guide you through the process of applying and reporting for Brown County United Way (BCUW) grants

This grant management site will house all documentation for your agency and programs specific to the grants you have applied and been approved to receive. If you have questions about the reporting process or need assistance utilizing the system, please reach out to the BCUW liaison for your grant funded program.

System of Care Grants, SOC (Three year granting cycle):

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Neighborhood Program Grants, NPG, (One year granting cycle):

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Table of Contents

Agency Login.....	Error! Bookmark not defined.
Forgot Password	9
Registering a New Agency.....	3
Agency Site Home Page	12
Account Management.....	13
User Profile	14
Change Password.....	14
Signout.....	15
Agency Information	15
Agency Profile	16
Account Name(s), Address(es), Phone Number(s) and Email Address(es)	16
Agency Contacts	17
Registering a New Program.....	19
Updating Program Information	21
Calendar.....	23
Site Visits	23
Resource Center.....	25
Accessing Resources	25
The Basics of your Applications / Grant Process.....	26
Accessing Application / Grant Process.....	26
Form Status.....	26
Entering Information	28
Save Options.....	28
Switching For ms.....	29
Attachments	30
Submitting Application	33
Printing Options	37
Questions and Answers	40
Applications / Grant Process.....	Error! Bookmark not defined.

Access Requirements as New Agency

Requirements: To access the e-CImpact grant management system you will need a computer with internet connection and current version of a web browser (example: Internet Explorer, Firefox, Chrome, Safari).

To login into the e-CImpact grant management system, you may either login through a web browser or through the Brown County United Way website.

New Agency Registration

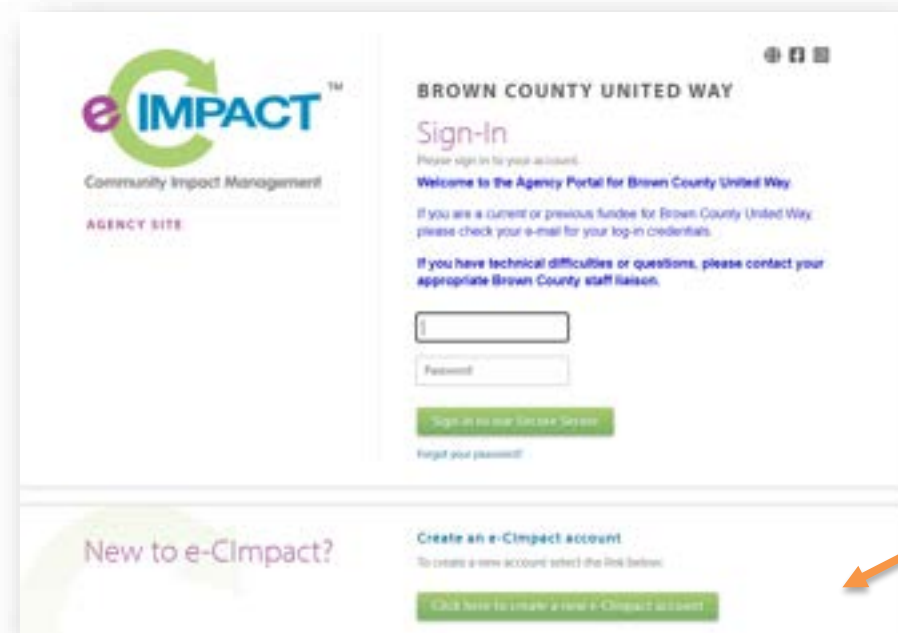
If you are not yet a United Way partner agency, please proceed with site registration. Registration is required for all non-partner agencies.

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.

Web Browser Access:

Type into the web browser URL: <https://agency.e-cimpact.com/login.aspx?org=53135U>

Step 1: From the agency login page select 'Click here to create new account.'



The Brown County United Way Welcome page will open, providing organization mission, staff liaison information and an introduction to the registration process. Please read and click the 'Next' button.



Step 2: This page requires you to input the agency EIN account information. This field is required to proceed forward in the registration process.

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



Step 3: The next prompt will require you to input your agency information. Once completed, proceed to the next page.

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:

Mission Statement:

Limit up to 750 characters (0 used).

Address

Address Type:*

Address Line 1:*

Address Line 2:

City:*

State:*

Zip Code:*

Email Address

Email Address Type:*

Email Address:*

Phone Number

Phone Number Type:*

Phone Number:*

Primary Contact Information

Contact Type:*

First Name:*

Last Name:*

Job Title:

Preferred Login

Enter your characters not contain
Password
-- abcdefg (invalid; contains only letters)
-- password (invalid; contains only letters and numbers)
-- 123456 (invalid; contains only numbers)
-- abc23 (invalid; less than 6 characters)

id to ensure that you have entered it correctly. Your Password must be between 6 and 15 character from 2 of the groups of alpha, numeric, or special characters. Your Password may contain any white-space.

Please note what username and password you create.

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

Preferred User Name:*

Password:*

Confirm Password:*

Previous

User Name and Password

Your username and password will be unique to you. Your username will be your email address. Please note the password requirements.



Preferred Login

Enter your Password then retype the Password to ensure that you have entered it correctly. Your 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 spaces.

Please refrain from using the same password across multiple websites. If your password is compromised, your accounts will become vulnerable on all of those websites regardless of how secure that site is.

Password Examples:

- abcdefg2 (valid, contains letters and numbers)
- pa55word (valid, contains letters and numbers)
- 1234567# (valid, contains letters and numbers)
- abcdefgh (invalid, contains only letters)
- abc23 (invalid, less than 6 characters)

Preferred User Name:*

Password:*

Confirm Password:*

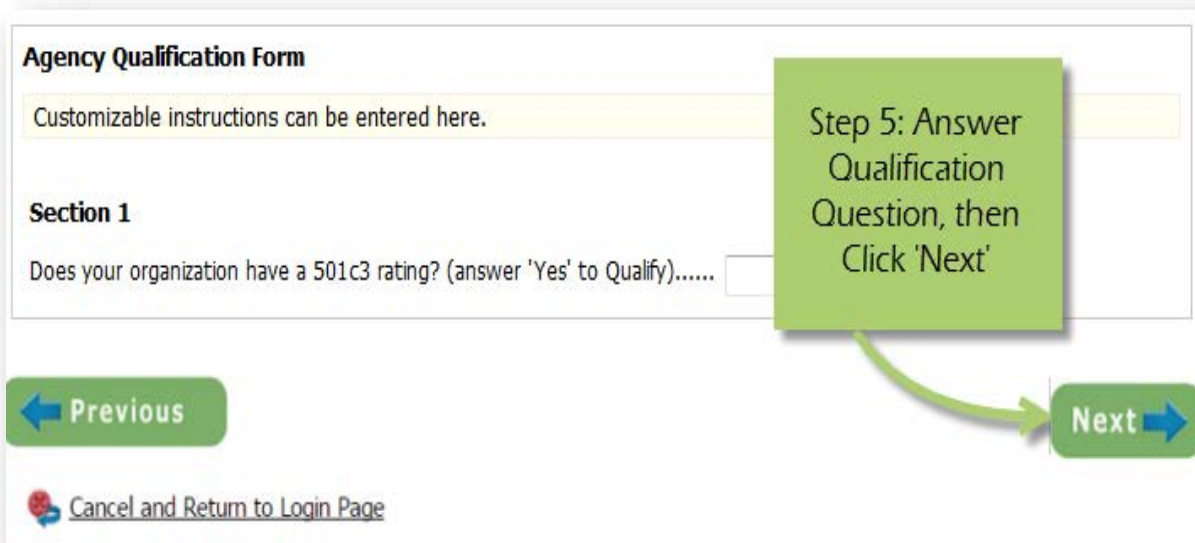
[Previous](#) [Next](#)

Once your account information has been created, you will be able to review the current list of available funding opportunities.

Step 4: Please select the grant that you would like to apply for and click 'Next'.



Step 5: The next page is a grant Qualification page. The Qualification form is used for most open process grants. This is the initial step for all applying agencies. 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.

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

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

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'

[Complete Registration](#) ➔

[Cancel and Return to Login Page](#)

Future Sign-In Information Accessing e-CImpact

Once you have created your new agency account and registration, you have multiple options for subsequent logins, via a web browser or through the Brown County United Way website.

Web Browser Access:

Type into the web browser URL: <https://agency.e-cimpact.com/login.aspx?org=>

Organizational Code: **53135U**

Username: your email address

Password: the unique password that you created during initial registration.

Click 'Sign In-to our Secure Server' or use the enter key.

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



The screenshot shows the e-CImpact Agency Portal Sign-In page. At the top left, it says "Brown County United Way". At the top right, there is a "United Way" logo. The main content area features the e-CImpact logo (a green circle with a white 'e' and the word "IMPACT" in blue) and the text "Community Impact Management" and "AGENCY SITE". On the right side, there is a "Sign-In" section with the heading "BROWN COUNTY UNITED WAY Sign-In". Below the heading, it says "Please sign in to your account." and "Welcome to the Agency Portal for Brown County United Way." There are two paragraphs of text: "If you are a current or previous fundee for Brown County United Way, please check your e-mail for your log-in credentials." and "If you have technical difficulties or questions, please contact your appropriate Brown County staff liaison." Below this text are two input fields: "User Name" and "Password". A green button labeled "Sign in to our Secure Server" is positioned below the input fields. At the bottom of the sign-in section, there is a link that says "Forgot your password?".

Brown County United Way Website Access:

Type into the web browser URL: <https://www.browncountyunitedway.org/>

Go to the drop-down tab: Our Impact.

Click on: Brown County United Way Grants.



This page contains general Brown County United Way granting information. At the bottom of the page, you will see information pertaining to access for e-CImpact.

Click on the hyperlink for 'Brown County United Way Grant Partner.'



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

Forgot Password

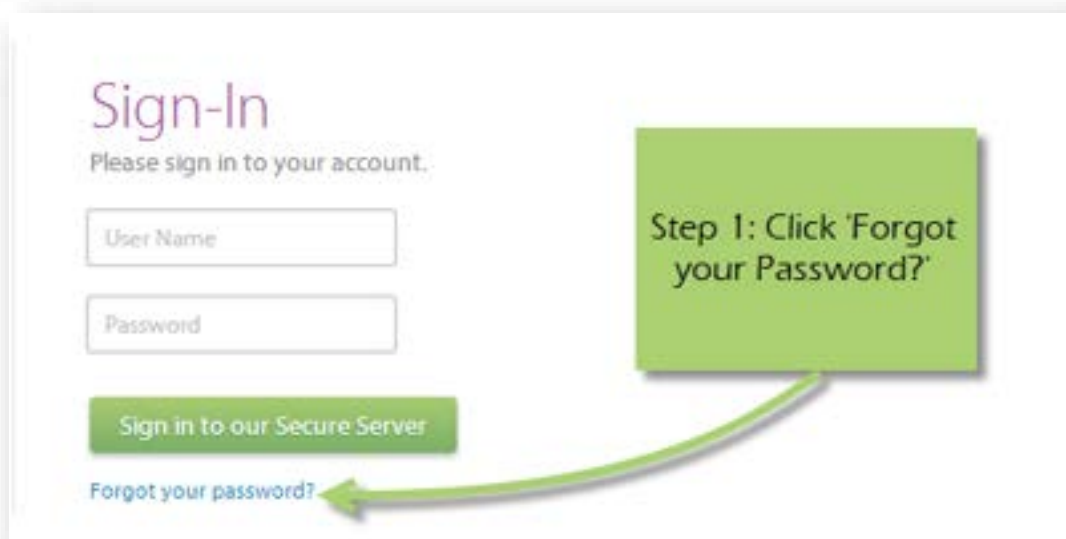
If you do not know or remember your password, you may either contact your council liaison or follow the steps to generate a new password.

Staff Liaisons:

Program Investment, Holly Ladwig

Impact Initiatives, Jill Sobeck

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



Step 2: Enter your username

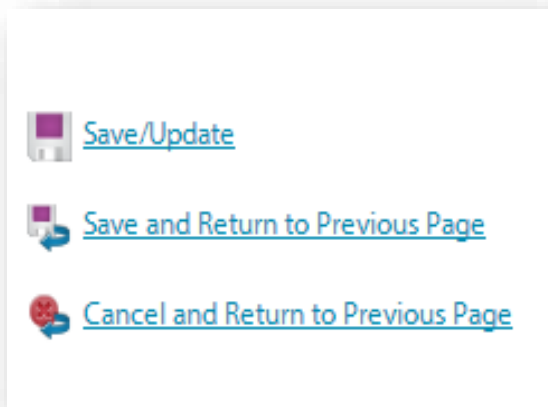
Step 3: Select 'Auto-Generate my Password'

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 staff liaison.

Agency Site Home Page

Common Navigation on the Agency Home Page

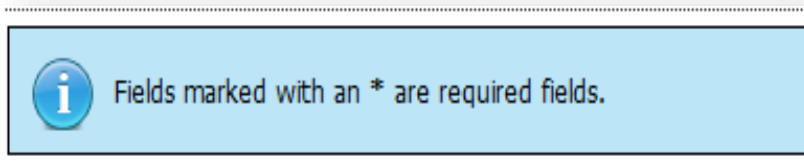
The navigation links in e-Clmpact are consistent throughout the site.



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.




Please note any fields marked with an asterisk.

Home Page Sections

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

[Hello, Rose Ogihara](#) | [Change Password](#) | [User Profile](#) | [Signout](#) (Session time remaining: 16:27) Font Size:



1. Account Management

Community Impact Management

2. Agency Information

Family Service Agency

- [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 \(1\)](#)
- [e-IMPACT Agency Training Manual \(1\)](#)

New Meeting

Application Training - Agency Site
 Thursday, February 28, 2013 @ 7:45 AM - 10:45 PM
Please RSVP for this Meeting!

Calendar

≤ February 2013 ≥

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

Today's Schedule: Thursday, February 14, 2013

- None Scheduled

Schedule for February

- None Scheduled

Our Work through Initiatives

African American Initiative Update
 This exciting program supports community-wide efforts to nurture young, at-risk African American boys as they develop into successful young men.

Immunization Initiative Update
 This nationally-recognized program is getting kids in underserved communities the immunizations they need to stay healthy.

3. News, Events, and Calendars

FEEDBACK

4. Application and Resource Center

Account Management

Hello, **Jill Sobieck** | [My User Profile](#) | [Change Password](#) [Sign Out](#) 1:57:31

User Profile

The User Profile is located at the top of the portal page. The various hyperlinks will allow you to edit your profile information, including primary contact, basic information, email addresses, phone numbers, and mailing addresses.

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. Any agency contact can update which contact should be set as the primary contact. The primary contact will be primary person at your agency that is responsible for grant reporting.

Agency Contacts: An agency contact is an element of the agency profile that houses agency employee information. Each contact at the agency can have their own address, phone, and email address information. Agency contacts have access to applications, reports, and the ability to input or amend any of those documents. Agency contacts have capacity to update agency profile information, including their contact type (or role). If the agency contact would like to be included in all bulk emails, Admin. will enable that from the user side upon request.

Active: Make sure your account is 'Active'. Once a user is deactivated you will need to contact your Brown County United Way granting liaison to reactivate the user account.

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

My User Profile

Fields marked with an * are required fields.

Primary?

Active?

Type:*

Prefix:

First Name:*

Middle Initial:

Last Name:*

Suffix:

Job Title:

[Save/Update](#)

[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

To Change Your Password

Step 1: To change your password, select the hyperlink '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.



Sign-Out

Users should ‘Sign Out’ of e-CImpact to ensure the security of their data. Once signed out of e-CImpact, press the ‘X’ in the upper right-hand corner of your browser to close the window.

Agency Information

Upon initial agency login, you will be prompted to review your agency information, and periodically throughout the year. The Agency Information section, located on the left-side of the page in the blue box, is where account information, contacts, statements (mission / vision / agency) and program information are located. From this section you will be able to update your address(es), contact information, and other agency 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.

Profile information includes primary information about the agency, including the agency name, staff liaison, and description. Access and manage the agency account names (which are more specific or alternate names used to identify an agency, such as a formal name), addresses, phone numbers, email addresses, associated agency groups, and more.

A screenshot of the 'Agency Profile' form. The form has a title bar with a blue background and a white border. Below the title bar, there is a light blue banner with a white icon and the text 'Fields marked with an * are required fields.' The form fields are: 'Agency Name*' (text input with '123 Test Agency'), 'EIN*' (text input with '567774568'), 'Accreditation By' (text input), 'Website' (text input), 'Staff Liaison' (text input), 'Primary Contact' (dropdown menu with 'Alexis Johnson'), and 'Description' (text area). A 'Save/Update' button is located at the bottom left. A note at the bottom of the description field says 'Limit up to 750 characters (2 used)'.

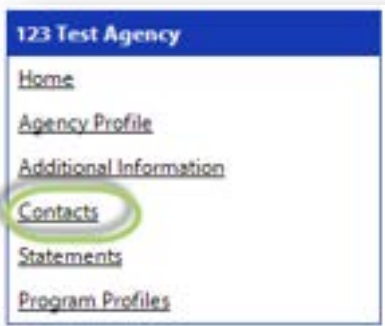
Account name(s), address(es), phone number(s) and email address(es)

You may also add, edit, or delete agency account names, address, phone numbers and email addresses. Agencies can 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				

Agency Contacts

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.



To add or edit contact information, click on Contacts, and click on 'Add New'.

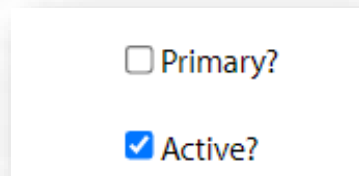


The agency contact profile page is like the user profile and contains the same information.

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

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

'Primary' can only be selected for one record.



Ability for Agency to Request Login for an Agency Contact


Agencies can request a login for their staff from the Agency Site. When an agency requests a new login, an automated email is sent to the agency's council liaison email address to alert them of a new agency login request. The council liaison will approve all


new agency requests. Agency contacts or volunteers that have not been approved of login credentials will display 'No Web Access' under the username column.

Once a new contact has been created, you are able to request a login for this user. At the bottom of the contact information page, check the box that requests a login account for the contact.

Login Account

Do you want to create a Login Account to e-Clmact for this contact?

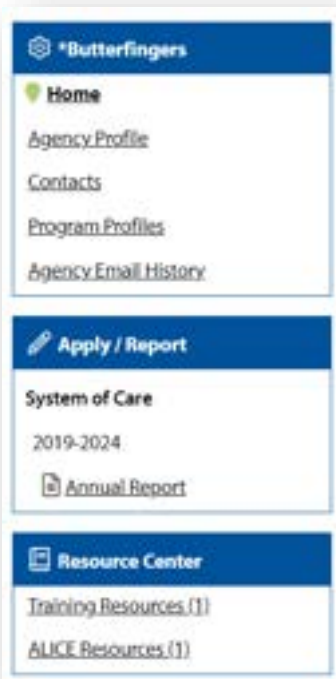
 [Save/Update](#)

 [Cancel and Return to Previous Page](#)

Registering a New Program

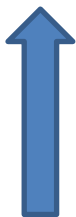
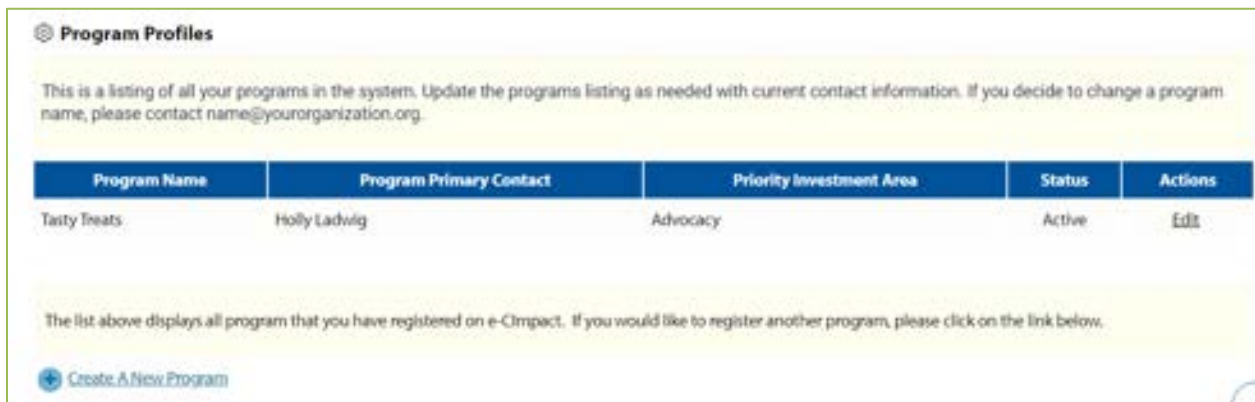
Agencies can access and update their program profile information via the Agency Site. The program profile contains information specific to the program, such as the program description, addresses, phone numbers, email addresses, program contacts, Impact Area and Managing Volunteer Group alignment, program level statements (such as Mission, Vision, etc.), and comments.

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



Step 1: Go to the Agency Program Profiles area.

Step 2: Select 'Create a New Program'



Step 2: Click on 'Create 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. From here you will be able to update information as needed.

Program Profiles

This is a listing of all your programs in the system. Update the programs listing as needed with current contact information. If you decide to change a program name, please contact name@yourorganization.org.


Program Name	Program Primary Contact	Priority Investment Area	Status	Actions
Tasty Treats	Holly Ludwig	Advocacy	Active	Edit

The list above displays all program that you have registered on e-Clmpact. If you would like to register another program, please click on the link below.

[Create A New Program](#)

Update all required and relevant information related to the individual program. Click 'Save/Complete Registration' at the bottom of the page.

Program Registration

 Fields marked with an * are required fields.

Program Information

Program Name:*
Limit up to 150 characters.

Program Type:

Priority Investment Area:

Taxonomy:

Description:
Limit up to 1500 characters.

Program Primary Contact:

Address

 [Copy Agency Primary Address](#)

Address Type:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Email Address

Email Type:

Email Address:

Phone Number

Phone Type:

Phone Number:


 [Save/Complete Registration](#)

Calendar

The calendar area will display any events, deadline dates, or scheduled site visits you have upcoming for the month. Some news items will display here as well.

Please note that the items listed in the calendar area are specific to the selected month.

If you wish to view items from another month use the arrows to switch months.



Step 2: Click arrow buttons to switch months.

Monday, November 22, 2021

November 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
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	29	30	1	2	3	4
5	6	7	8	9	10	11

Today

- None Scheduled

November

- None Scheduled

Site Visits

The Site Visit section in e-Clmpact can be used to manage scheduling of agency site visits. Once an agency is invited to schedule a site visit, they will see a 'Current Site Visit' link on the left side navigation box on the Agency Site. There are two (2) methods by which a time slot can be reserved for an agency/program:

- An agency chooses a sign-up day/time slot from the Agency Site, OR
- An Admin Site user assigns a time slot to the agency from the Administrative Site.

Site Visits can be created as agency-level visits, meaning each agency can only sign up once, or program-level visits, where an agency can sign up for a site visit time slot for each individual program. Site Visit scheduling includes the ability to limit numbers of attendees to specific time slots, specify a location, set start and end times, and send email notifications.

This feature will be activated once the Admin. at United Way coordinates with the agency regarding site visit availability. This is currently inactive on the agency site.

Step 1: To access the site visit area select 'Current Site Visit'

Step 2: Select 'Reserve Time Slot' for the agency or program.

Schedule > Current Site Visit

Site Visit	Staff Liaison	# of Volunteer(s)	Actions
2013 Health Site Visits		0	Reserve Time Slot
2013 Education Site Visits		0	Reserve Time Slot

Step 1: Click on 'Current Site Visit'

Step 2: 'Reserve Time Slot'

Step 3: Choose the date and address desired.

Step 4: 'Save/Update' or 'Save and Return to Previous Page'

Schedule > Current Site Visit > Reserve Time Slot

Fields marked with an * are required fields.

Site Visit: 2013 Education Site Visits

Date*: 4/25/2013 9:00 AM

Address*: 1248 Any Street, Anytown, IL 98277, U.S.A.

Staff Liaison: Kate Attea

of Volunteer(s): 0

Save/Update

Save and Return to Previous Page

Cancel and Return to Previous Page

Cancel this Site Visit Sign-up

Step 3: Select the date and address

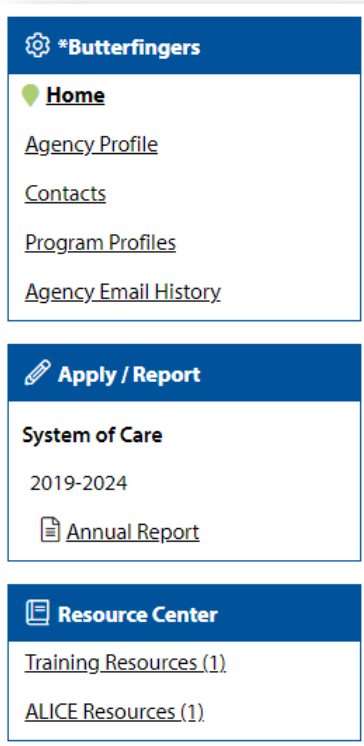
Step 4: Save

Resource Center

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

Accessing Resources

Step 1: Select desired resource item.



Step 1: Select the resource you wish to reference.

Step 2: Click on the attachment link to open.



The Basics of Applications and Grant Process

Accessing Application / Grant Process

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



Step 1: Click the link for the application or grant you would like to apply for

Form Status

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

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation		Not Started	
Agency Information*		Not Started	
Alternative Education Pro		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	

Not Started: When the application or form is in 'Not Started' status, it means that there has not been any data entered yet.

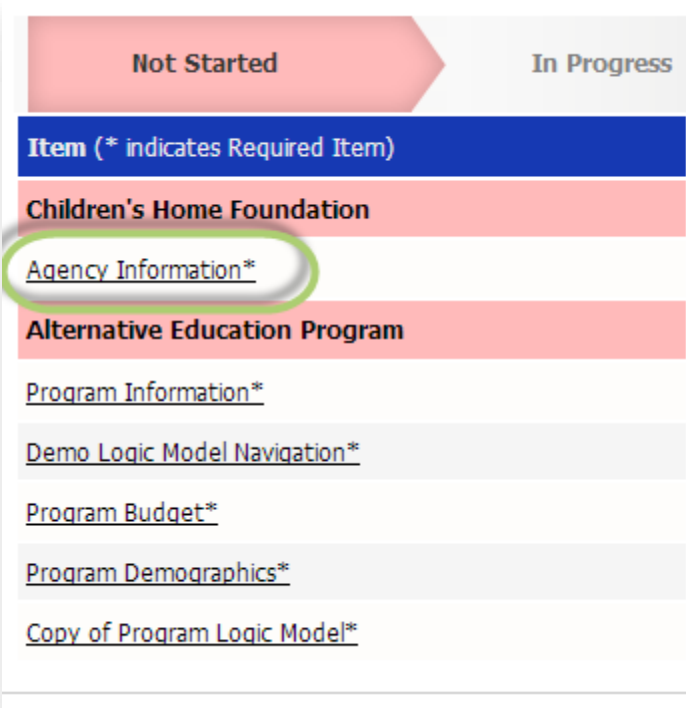
In Progress: If your form is set to 'In Progress', then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

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 the 'Submitted' status, you will no longer be able to make changes to the information on the forms. If you submit, and realize you need to edit or submitted in error; you will need to contact your staff liaison.

Entering Information

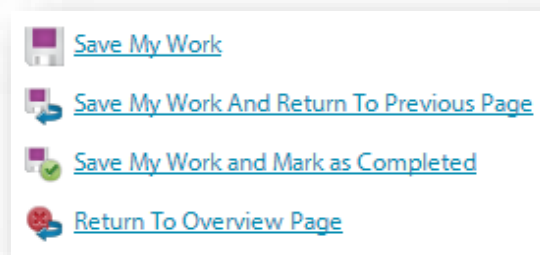
To begin filling out your application, click on the desired form:



The screenshot shows a navigation menu with two tabs: 'Not Started' (highlighted in red) and 'In Progress'. Below the tabs is a list of items, each with a blue header and a light red body. The items are: 'Children's Home Foundation', 'Agency Information*' (circled in green), 'Alternative Education Program', 'Program Information*', 'Demo Logic Model Navigation*', 'Program Budget*', 'Program Demographics*', and 'Copy of Program Logic Model*'. The asterisk indicates a required item.

Save Options

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



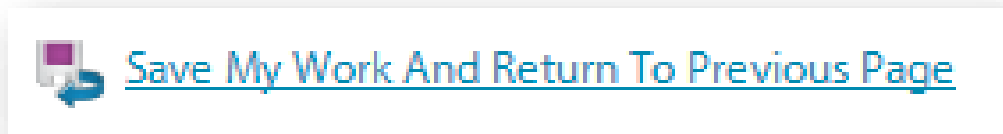
Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

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

Switching Forms

There are two ways to switch forms within an application:

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



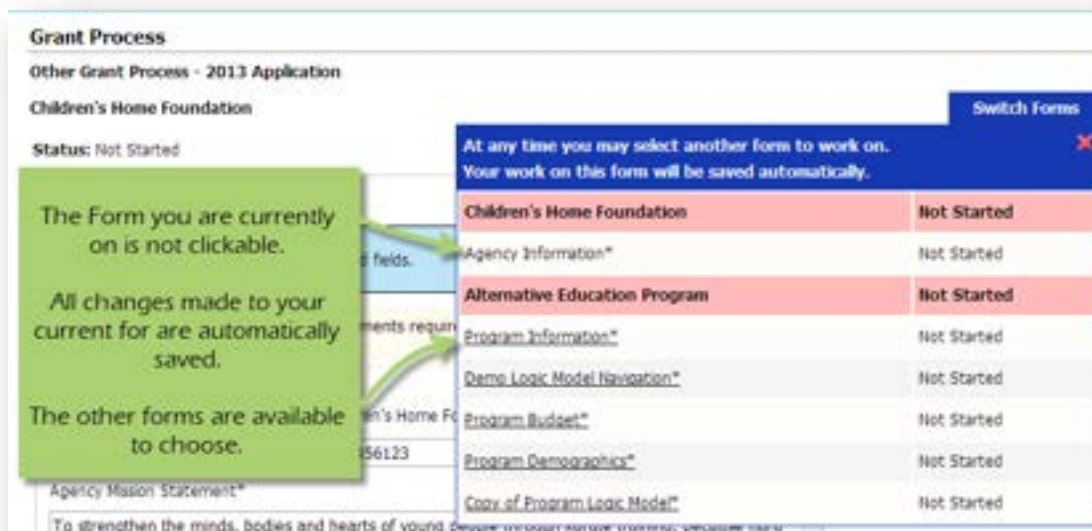
Second option: You can use the 'Switch Forms' option, located in the upper right-hand corner. To use the second option, follow the steps below.

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



The screenshot shows a web form titled "Grant Process". Under the heading "Other Grant Process - 2013 Application", the text "Children's Home Foundation" and "Status: Not Started" is visible. A blue button labeled "Switch Forms" is located in the upper right corner of the form area. A green callout box with the text "Step 1: Click here to see a list of other forms available" has a green arrow pointing to the "Switch Forms" button. Below the "Agency Information" section, there is a blue information bar that says "Fields marked with an * are required fields." and a yellow note that says "***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.



Attachments

Uploading Attachments

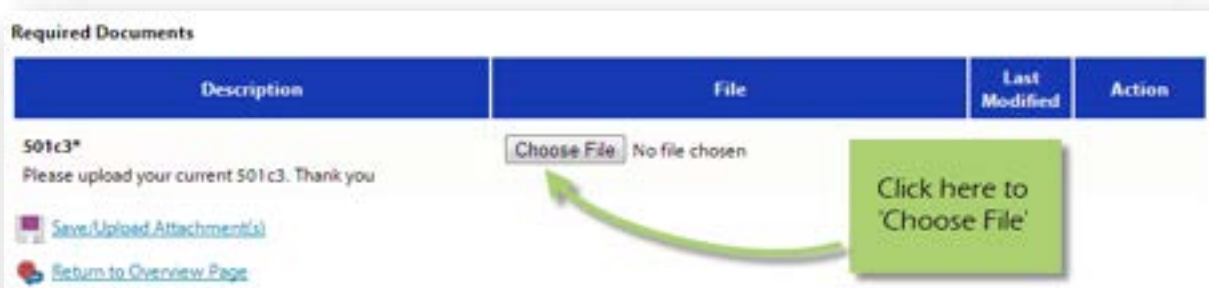
If you are uploading attachments, the following file types and file size are acceptable:

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

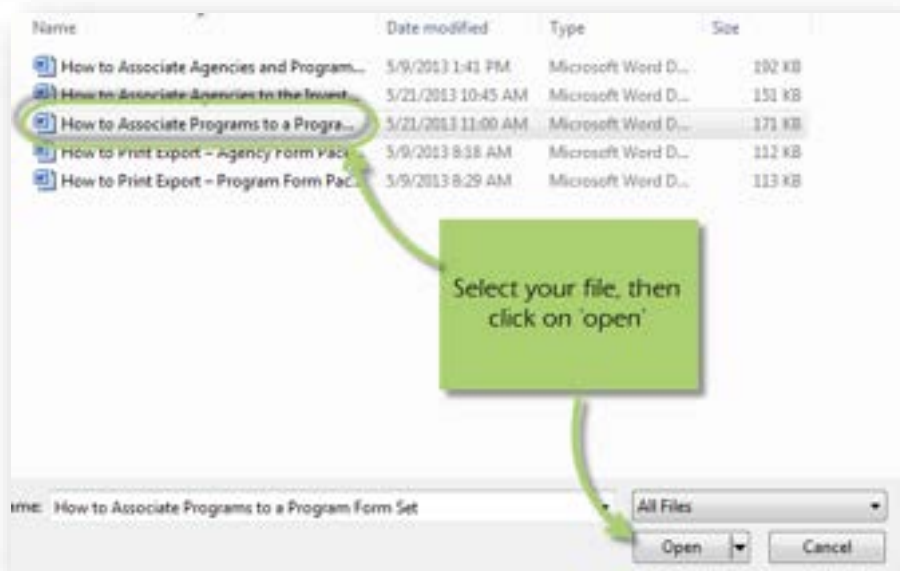
Step 1: Click on the 'Required Documents' form.



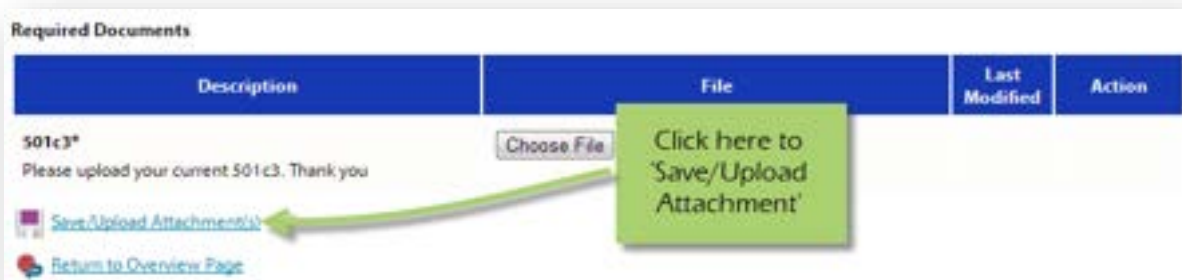
Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.



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

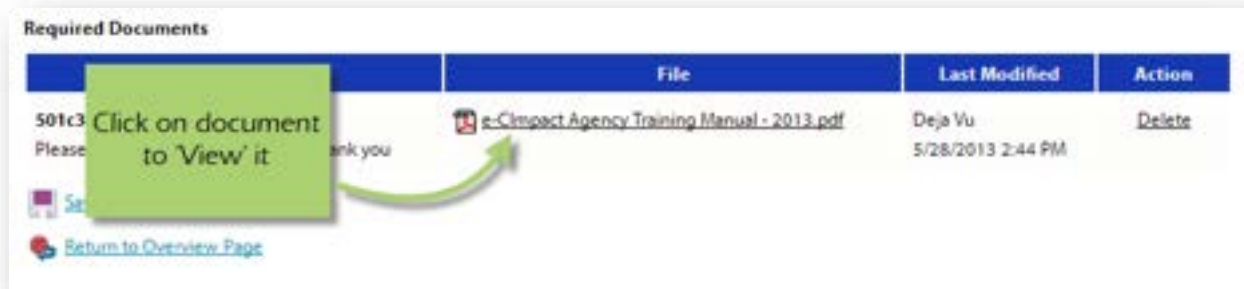


Step 4: Click on 'Save/Upload Attachment(s)'.



Viewing Attachments

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



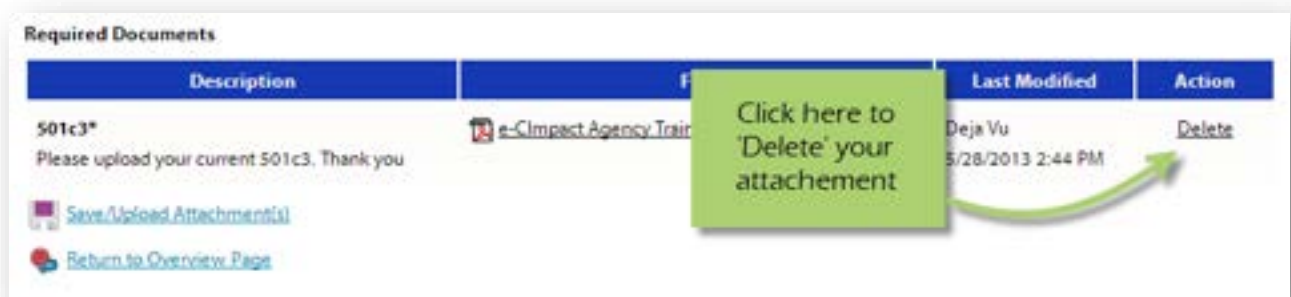
Deleting Attachments

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

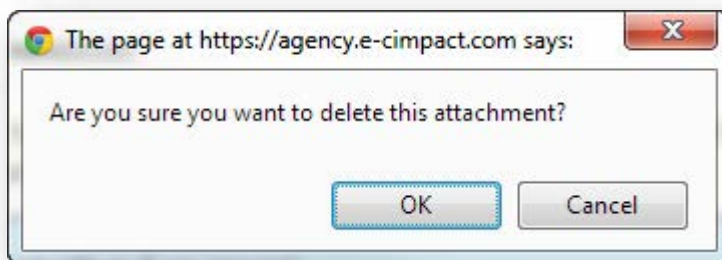
Step 1: Open documents form.



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



Step 3: Confirm you would like to delete this attachment.



You are now able to upload the correct attachment.

Submitting the Application

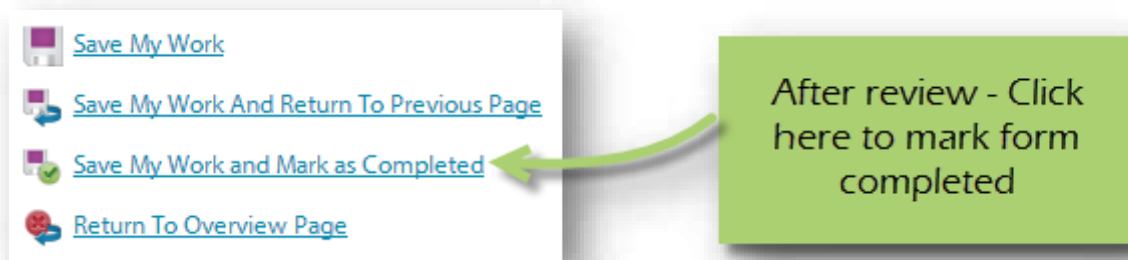
Mark Forms 'Complete / Ready to Submit'

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

Step 1: Open form.

Application Status		Print / Review Options	
Item (* indicates Required Item)	Status	Action	
Children's Home Foundation	In Progress		
Agency Information*	In Progress		
Required Documents	Completed / Ready To Submit		
After School Program	Completed / Ready To Submit	<input checked="" type="checkbox"/> Include?	

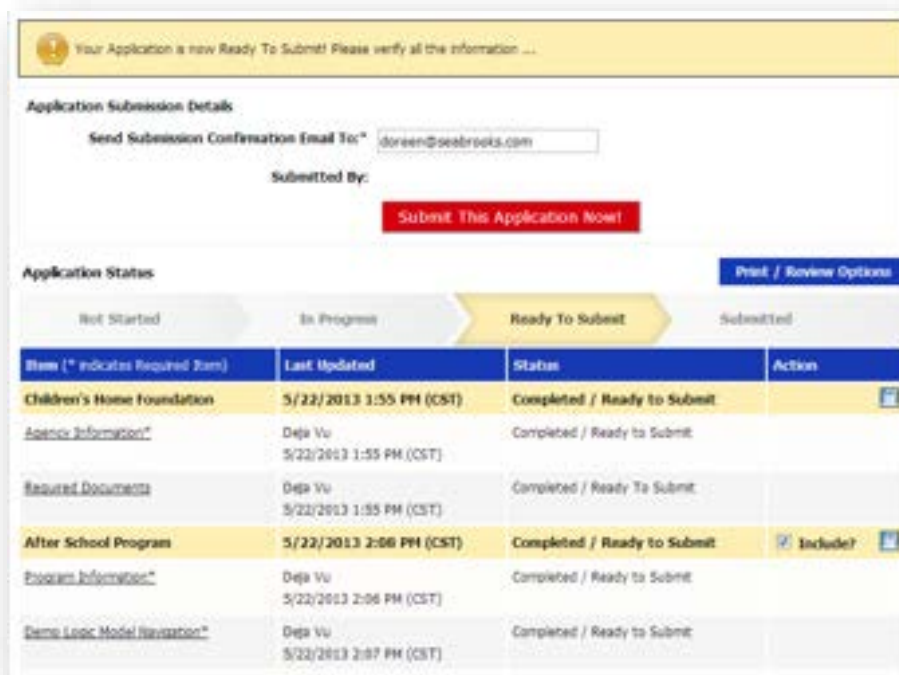
Step 2: Review information, then ‘Save My Work and Mark as Completed’



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.



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.

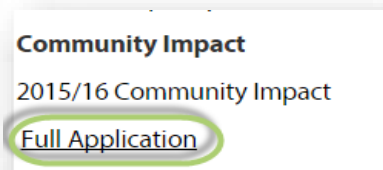
Printing Options

There are different options for printing:

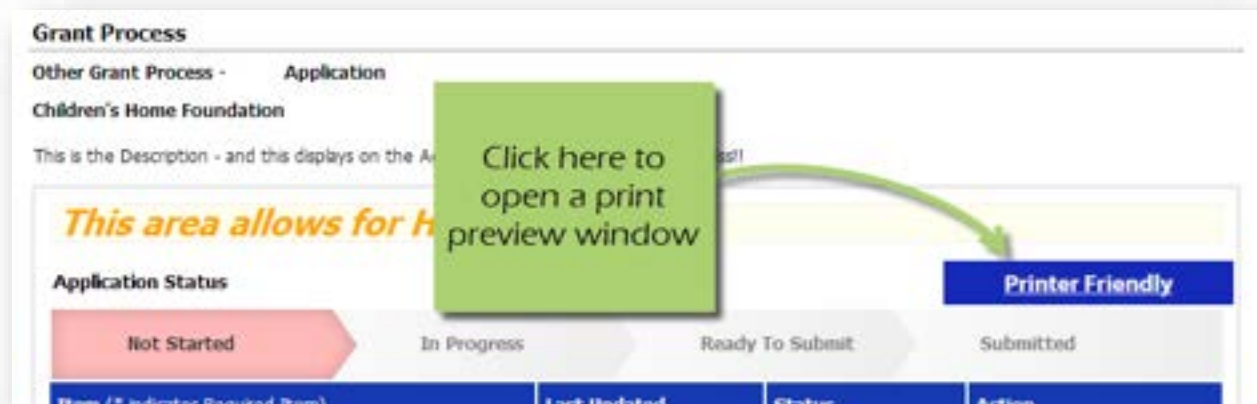
- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet– This will print all forms that are program specific.
- Individual Form – This will print the individual form.

The Entire Application

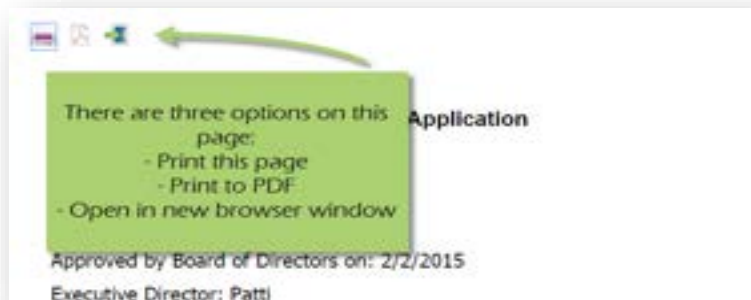
Step 1: Open the application by clicking on it in the left-hand navigation.



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 to print.

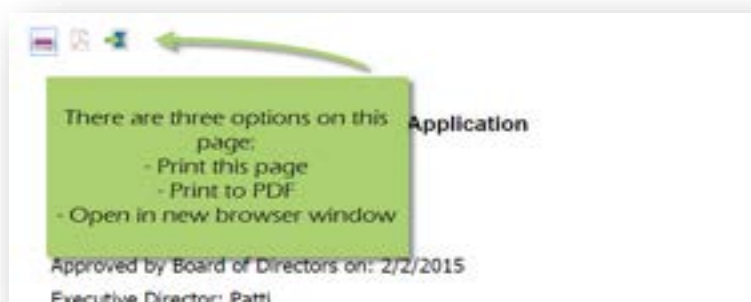


Agency Packet

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 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	
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	
Program Information*		Not Started	
Demo Logic Model Navigation*		Not Started	

Individual Forms

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

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		Not Started	
Agency Information*		Not Started	
Required Documents	Deja Vu	Completed / Ready To Submit	
After School Program		Not Started	
Program Information*		Not Started	

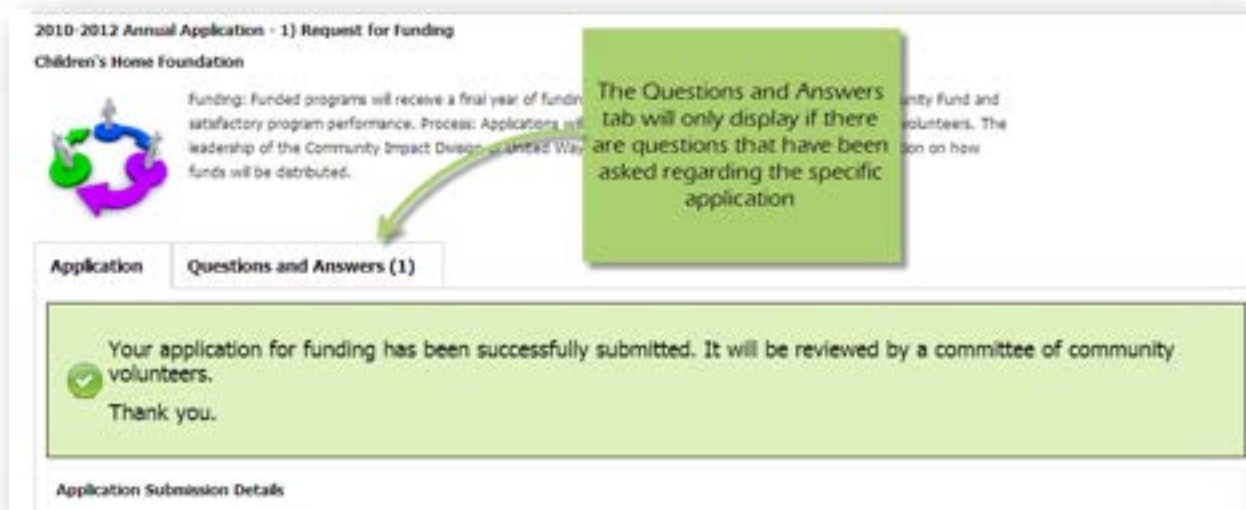
Step 2: In the lower right-hand corner of your form are the option for printing.



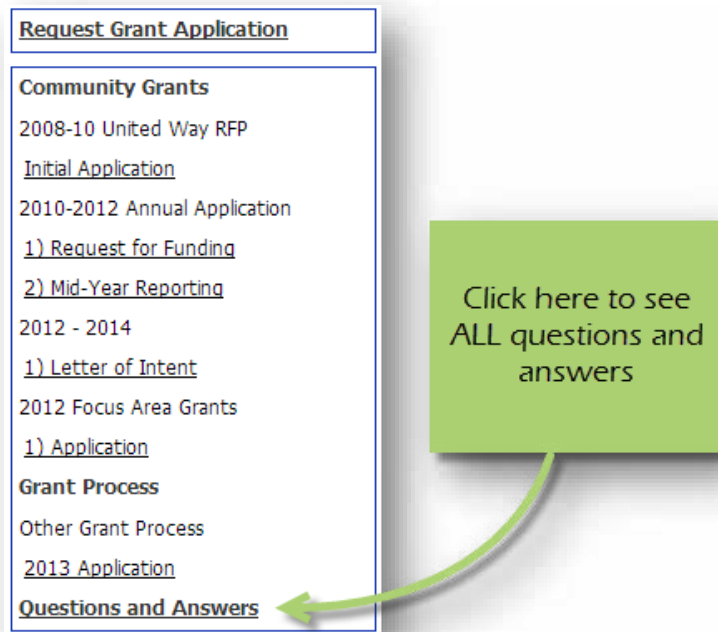
Questions and Answers

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.



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

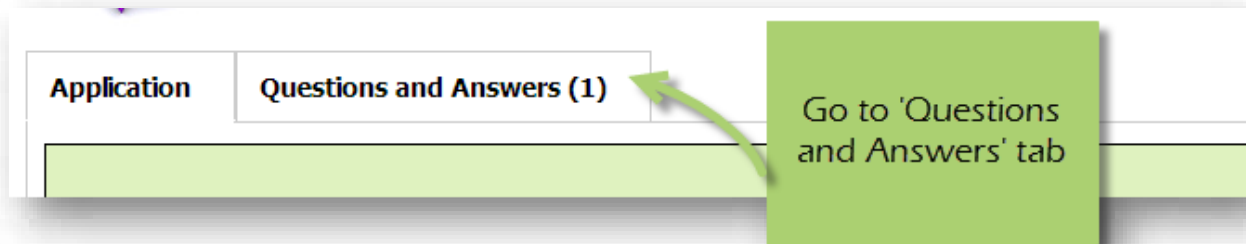


Responding to a Question – In the Application

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'.



Once the answer is saved, it is approved by your BCUW staff liaison, 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.



Step 2: Click ‘Respond’ next to desired question.



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



Print / Export - Questions and Answers

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

