



Community Impact Management

2019

Agency Training Manual

United Way of Central Texas

4 North 3rd St
Temple, TX 76513

For Support, please contact:

Aly McMillan

Aly.McMillan@uwct.org

254-778-8616

Table of Contents

Accessing e-CImpact	2
Agency Login.....	3
Forgot Password	4
Registering a New Agency.....	5
Common Navigation	11
Agency Site Home Page	12
Account Management	13
Change Password.....	13
User Profile	13
Signout.....	14
Agency Information	15
Agency Profile	15
Account name(s), address(es), phone number(s) and email address(es)	16
Agency Contacts	17
Updating Program Information.....	20
Calendar	21
Site Visits	22
Resource Center	23
Accessing Resources	23
The Basics of your Applications / Grant Process	24
Accessing Application / Grant Process	24
Form Status.....	25
Entering Information.....	26
Save Options.....	26

Switching Forms.....	27
Attachments	28
Submitting Application.....	32
Printing Options.....	35
Questions and Answers	38
Applications / Grant Process.....	Error! Bookmark not defined.

Accessing e-Clmpact

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

To access the e-Clmpact website, please go to

Direct access to the agency site is: <https://agency.e-clmpact.com/login.aspx?org=46817F>

Please bookmark the address to easily access e-Clmpact 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 Aly McMillan.*

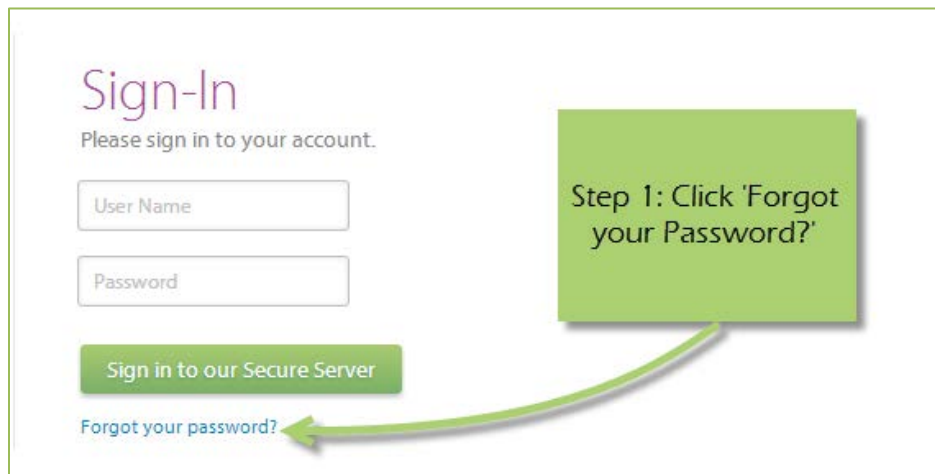
Step 1: Enter your username and password

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

The screenshot shows the e-IMPACT Agency Site login page. On the left is the e-IMPACT logo with the tagline 'Community Impact Management' and a link for 'AGENCY SITE'. The main content area is titled 'Sign-In' and includes the instruction 'Please sign in to your account.' Below this are two input fields: 'User Name' and 'Password'. A green button labeled 'Sign in to our Secure Server' is positioned below the fields, with a 'Forgot your password?' link underneath. A green callout box labeled 'Step 1: Enter Username and Password' has an arrow pointing to the 'User Name' field. Another green callout box labeled 'Step 2: Click 'Sign in to our Secure Server'' has an arrow pointing to the 'Sign in to our Secure Server' button. At the bottom of the page, there is a section for 'New to e-IMPACT?' with a link to 'Click here to create a new Account'. The footer contains security logos for 'Secured by Thawte' and 'POWERED BY seabrooks', along with copyright information for 2013 e-IMPACT, Community Impact Management.

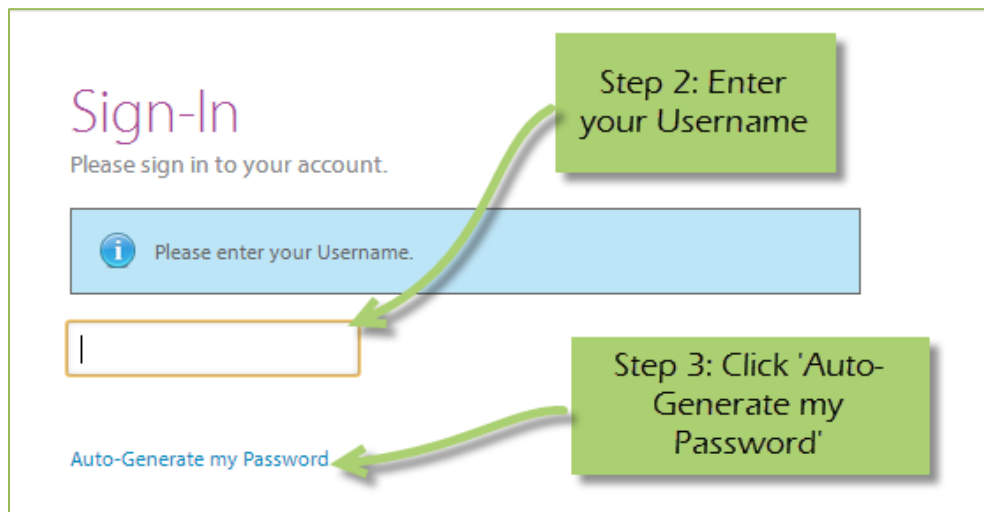
Forgot Password

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 Aly McMillan at Aly.McMillan@uwct.org.

Registering a New Agency

If you are not yet a United Way of Central Texas 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'**

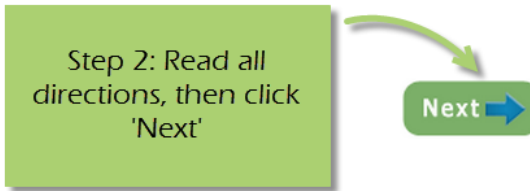
The screenshot shows the e-IMPACT Agency Site login page. On the left is the e-IMPACT logo with the text 'Community Impact Management' and 'AGENCY SITE'. On the right is a 'Sign-In' section with fields for 'User Name' and 'Password', a 'Sign in to our Secure Server' button, and a 'Forgot your password?' link. Below the sign-in section is a 'New to e-IMPACT?' section with a 'Don't have an account?' link and a 'Click here to create a new Account' button. A green callout box on the right says 'Step 1: Click here to create a new account' with an arrow pointing to the 'Click here to create a new Account' button. At the bottom, there is a 'Secured by Thawte' logo and 'POWERED BY seabrooks' logo.

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.

 [Cancel and Return to Login Page](#)



e-Impact™ Community Impact Management
© 2015 Powered by Seabrooks.

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-Impact 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:

Mission Statements:

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 and contain at least 2 of the groups of alpha, numeric, or special characters. Your Password may not contain any white-space.

Please note what username and password you create.

Password:

- abcd1234567890 (letters and numbers)
- abc!@#\$%^&* (letters, numbers, and special characters)
- 1234567890 (numbers)
- abcdefghijklmnop (letters)
- abc23 (invalid, less than 6 characters)

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.

Apply / Report

Community Impact Fund - 2019 Funding Cycle

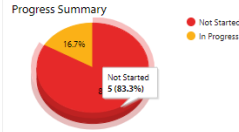


United Way of Central Texas

Letter of Intent

The 2019 Letter of Intent process is open to nonprofit agencies with an IRS designation of 501(c)3 serving populations in East Bell County Texas who wish to apply for Community Impact Grant Funding.

Status: ● In Progress
Last Updated: 11/13/2018 12:15:10 PM
Due Date: 12/15/2018 5:00:00 PM
Remaining: 32 days 4 hours 39:48 minutes
[Click Here to Continue Working](#)



Community Impact Fund - 2019 Funding Cycle



United Way of Central Texas

Application for 2019 Community Investment Grant

Welcome to the United Way of Central Texas 2019 Community Investment Grant application.

Status: ● Not Started
Due Date: 2/16/2019 11:59:00 PM
Remaining: 95 days 11 hours 38:48 minutes
[Click Here to Get Started](#)



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](#) [Next](#)

[Cancel and Return to Login Page](#)

Step 5: Answer Qualification Question, then Click '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)

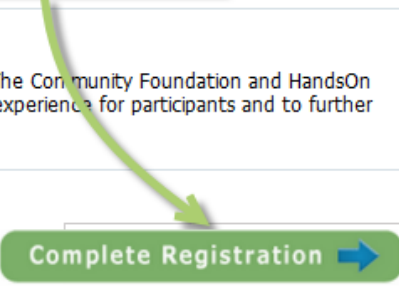
Preferred Login
Username: 123agency
Password: *****

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.

Complete Registration →

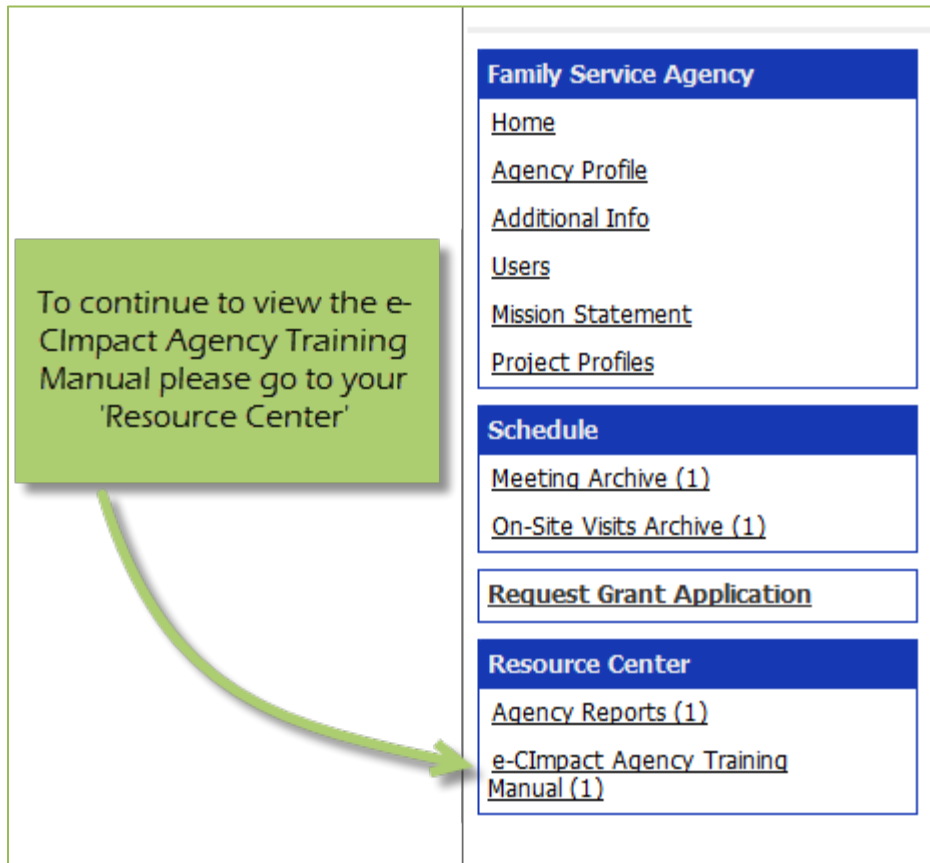


Step 6: Review your agencies information, then 'Complete Registration'



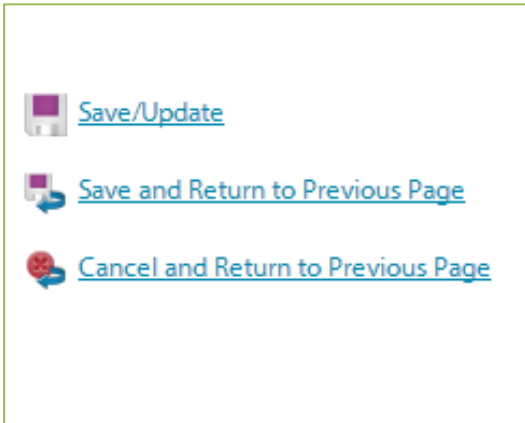
Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email.

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



Common Navigation

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



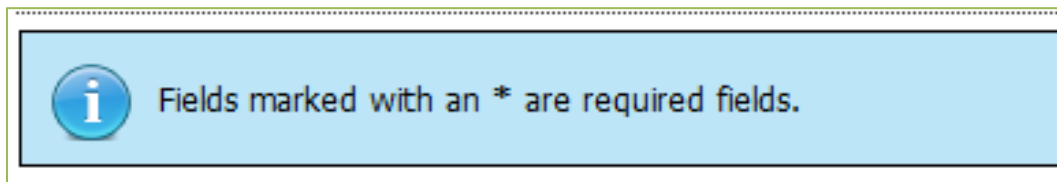
Save/Update: Refreshes the page while saving any changes made to your data.

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, there is a user greeting: "Hello, Rose Ogihara" with links for "Change Password", "User Profile", and "Signout", and a session time of "16:27". The page features the e-IMPACT logo and a navigation menu on the left. Four green callout boxes highlight key sections: "1. Account Management" points to the top right; "2. Agency Information" points to the left sidebar; "3. News, Events, and Calendars" points to the "New Meeting" and "Calendar" sections; and "4. Application and Resource Center" points to the "Request Grant Application" and "Resource Center" sections. The "New Meeting" section lists "Application Training - Agency Site" on Thursday, February 28, 2013, with a red "Please RSVP for this Meeting!" notice. The "Calendar" section shows a calendar for February 2013 with the 14th highlighted. The "Our Work through Initiatives" section includes updates on the "African American Initiative" and "Immunization Initiative". A vertical "FEEDBACK" button is located on the right side of the page.

1. Account Management

2. Agency Information

3. News, Events, and Calendars

4. Application and Resource Center

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 Aly McMillan to reactivate the user account.

Contacts

 Fields marked with an * are required fields.

Primary?
 Include in all Emails?
 Active?

Type:*

Prefix:

First Name:*


Middle Initial:


Last Name:*


Suffix:

Company:

Job Title:

 [Save/Update](#)

 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)

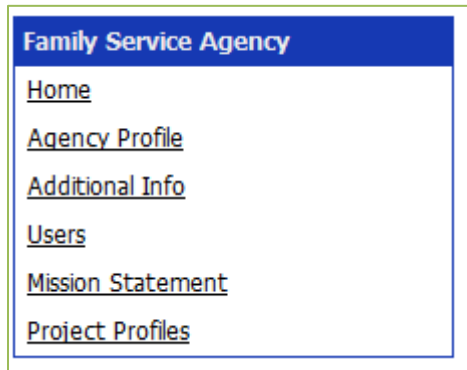
Enter any necessary information, and then click 'Save/Update'.

Signout

Users should 'Signout' of e-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.

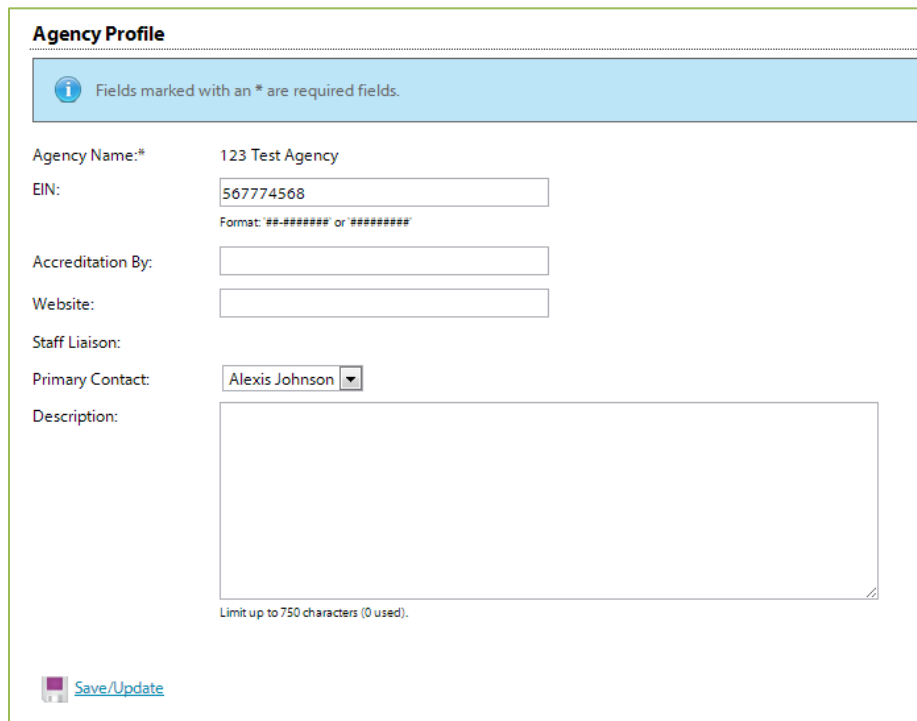
[Agency Information](#)

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 note 'Format: ##-##### or #-#####'; 'Accreditation By:' with an empty text box; 'Website:' with an empty text box; 'Staff Liaison:' with an empty text box; 'Primary Contact:' with a dropdown menu showing 'Alexis Johnson'; and 'Description:' with a large text area. At the bottom of the description area, it says 'Limit up to 750 characters (0 used)'. At the bottom left of the form, there is a 'Save/Update' button with a small icon.

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.

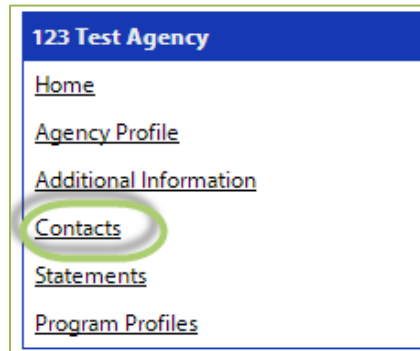
Agency Contacts

- 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.

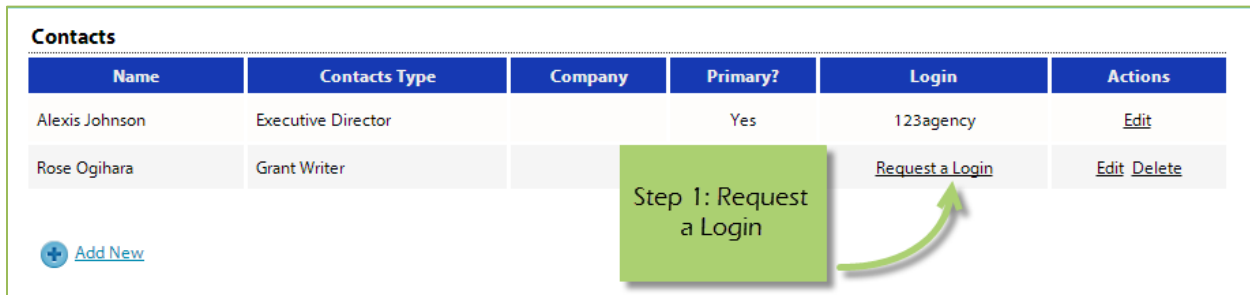
Contacts					
Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Exec		Yes		Edit
<div style="display: flex; justify-content: space-between;"><div>+ Add New</div><div><div style="border: 1px solid green; background-color: #d4edda; padding: 5px; display: inline-block;">Click here to Add New contacts</div></div><div><div style="border: 1px solid green; background-color: #d4edda; padding: 5px; display: inline-block;">Click here to 'Edit' existing contacts</div></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'



The screenshot shows a table with the following data:

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

A green callout box with the text "Step 1: Request a Login" and a green arrow pointing to the "Request a Login" link in the second row. Below the table is a blue "+ Add New" button.

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:*	<input type="text"/>
Password:*	<input type="password"/> no value
Confirm Password:*	<input type="password"/> no value

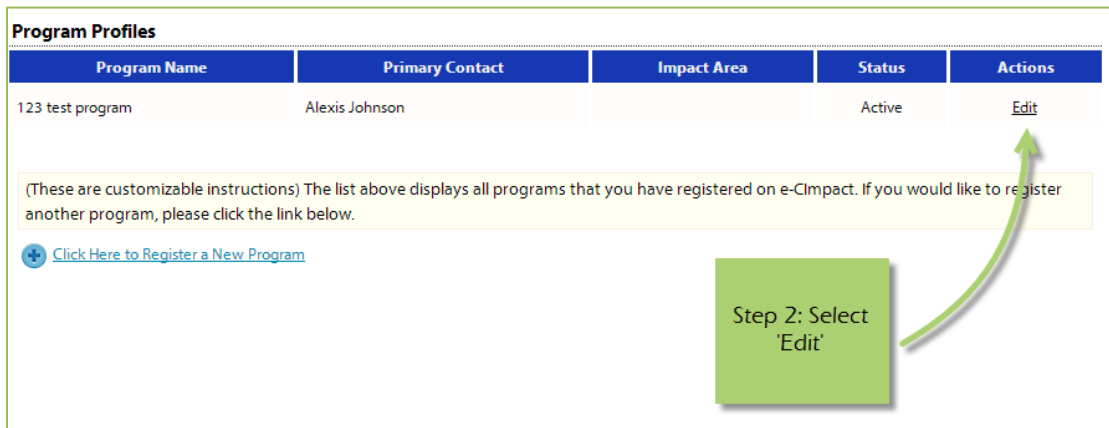
 [Save/Update](#)

 [Return To Previous Page](#)

Updating Program Information

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

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



The screenshot shows a table titled "Program Profiles" with the following columns: Program Name, Primary Contact, Impact Area, Status, and Actions. A single row is visible with the following data: "123 test program", "Alexis Johnson", an empty cell, "Active", and a link labeled "Edit". Below the table, there is a yellow callout box containing the text: "(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." Below the callout box is a blue link with a plus icon: "+ Click Here to Register a New Program". A green callout box with the text "Step 2: Select 'Edit'" has a green arrow pointing to the "Edit" link in the table.

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 **or** **inactivate** information needed.

Calendar

The calendar area will display any events or site visits you have RSVP's for. Some news items will display here as well.

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

Calendar

May 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	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	31	1
2	3	4	5	6	7	8

Today's Schedule: Tuesday, May 21, 2013

- None Scheduled

Schedule for May

- [\(5/31/2013\)](#)

[2013 Community Impact Application](#)

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

Calendar

April 2013						
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's Schedule: Tuesday, May 21, 2013

- None Scheduled

Schedule for April

- None Scheduled

Use the arrows to switch months

Site Visits

When offered, you are able to select dates available for volunteers to come and visit your 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.

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 3: Choose the date and address desired.

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

Fields marked with an * are required fields.

Site Visit: 2013 Education Site Visits

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

Address:* 1248 Any Sreet, 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](#)

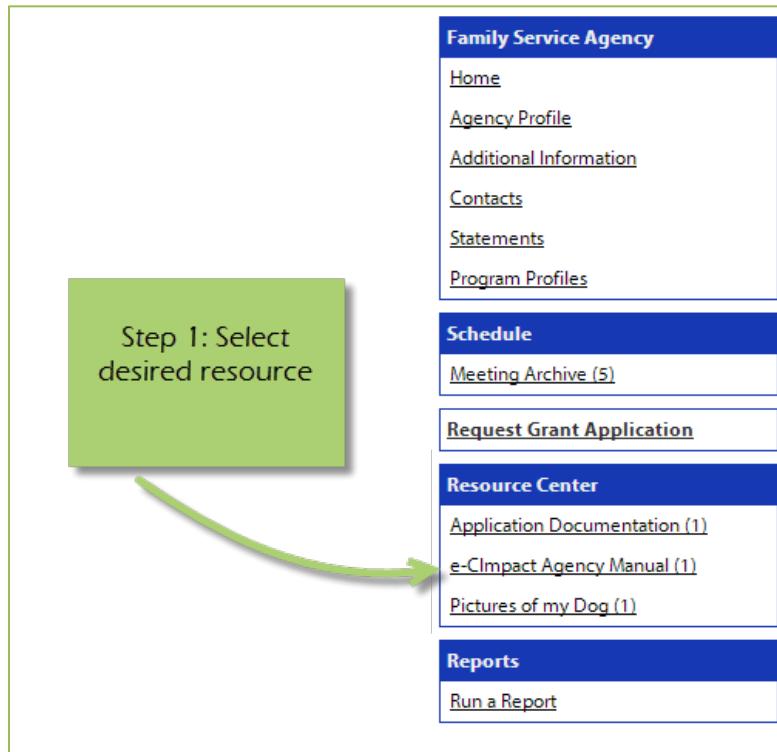
[Cancel this Site Visit Sign-up](#)

Resource Center

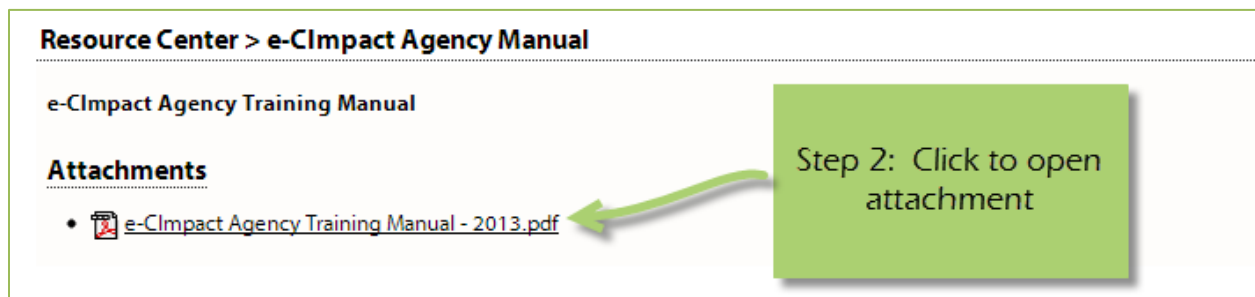
The agency resource center is where you will be able to find any documents you may need to reference from United Way of Central Texas. The resource center is located in the lower half of the left hand navigation.

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.



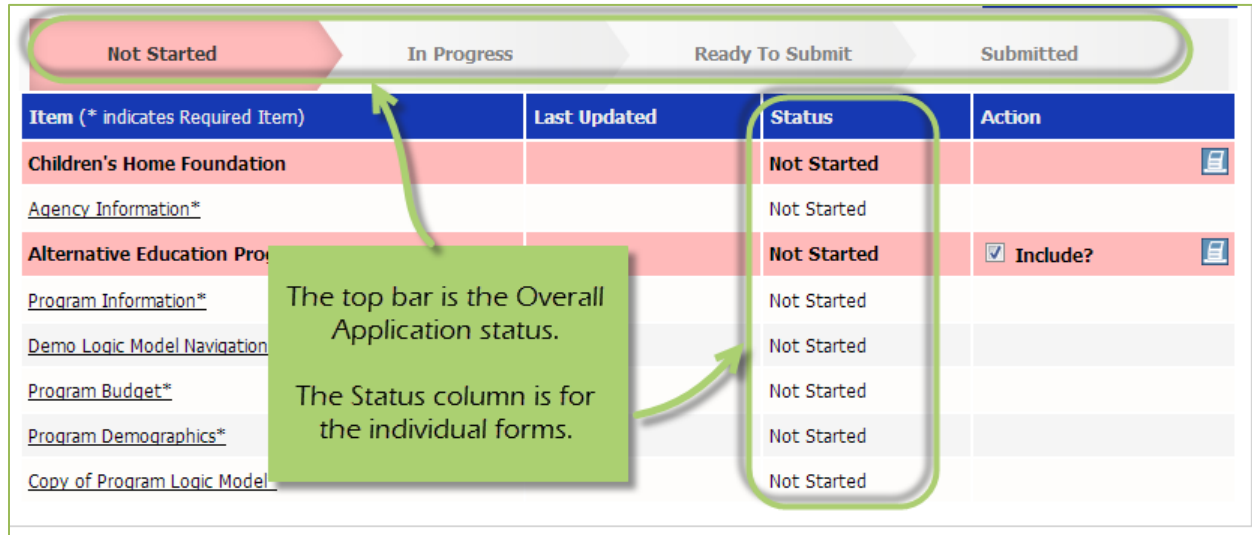
The image shows a screenshot of a web application's navigation menu. The menu is titled "Request Grant Application" and contains several categories and links. A green callout box with a shadow points to the "2013 Application" link. The text inside the callout box reads: "Step 1: Click the link for the application or grant you would like to apply for".

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**

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 dashboard with a top navigation bar and a table below. The top bar has four segments: 'Not Started' (highlighted in red), 'In Progress' (grey), 'Ready To Submit' (grey), and 'Submitted' (grey). The table has four columns: 'Item (* indicates Required Item)', 'Last Updated', 'Status', and 'Action'. The first row is for 'Children's Home Foundation' and the second for 'Alternative Education Program'. A green callout box points to the top bar with the text 'The top bar is the Overall Application status.' Another green callout box points to the 'Status' column with the text 'The Status column is for the individual forms.'

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	

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

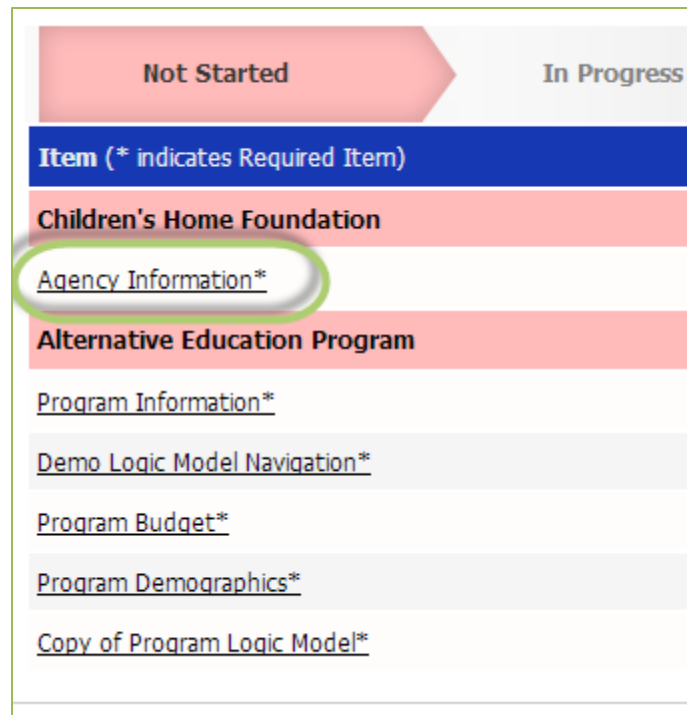
In Progress: If your form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

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 Aly McMillan.

Entering Information

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



The screenshot shows a web application interface with two tabs: 'Not Started' (highlighted in red) and 'In Progress'. Below the tabs is a list of forms under the heading 'Item (* indicates Required Item)'. The forms listed are:

- Children's Home Foundation
- Agency Information* (highlighted with a green circle)
- Alternative Education Program
- Program Information*
- Demo Logic Model Navigation*
- Program Budget*
- Program Demographics*
- Copy of Program Logic Model*

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 turn it in.

Switching Forms

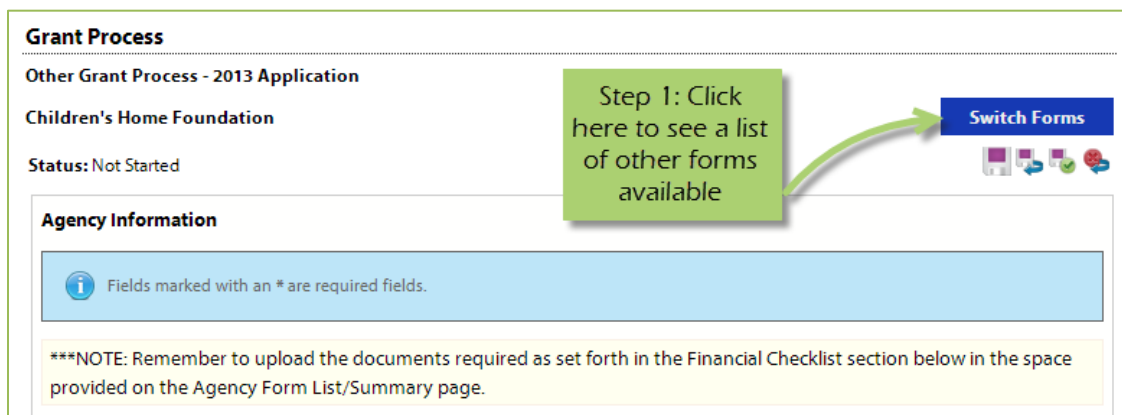
There are two ways to switch forms within an application:

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

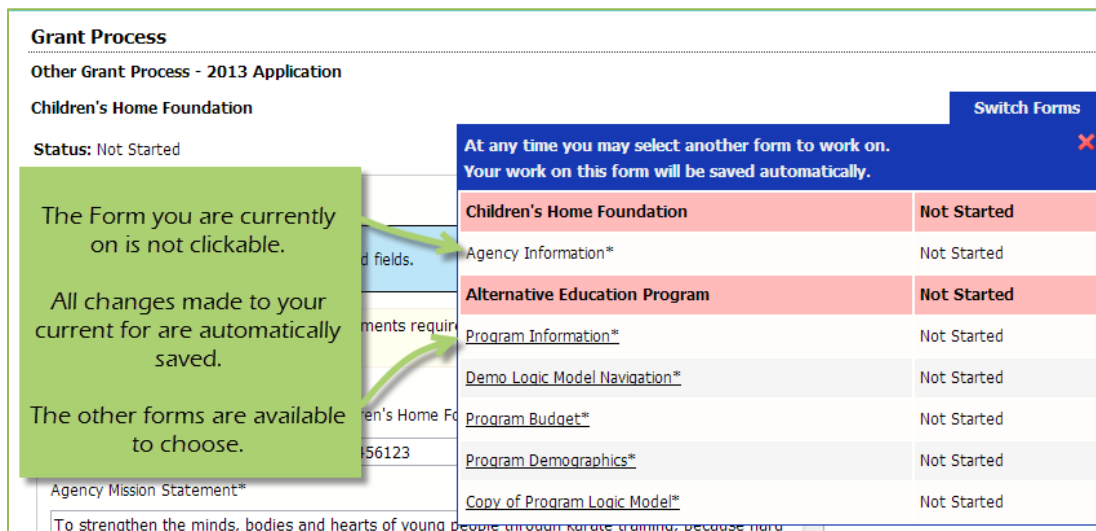


Second: You can use the 'Switch Forms' option, located in the upper right hand corner.

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

A screenshot of a web application interface. At the top, it says "Grant Process" followed by "Other Grant Process - 2013 Application" and "Children's Home Foundation". Below that, it says "Status: Not Started". A green callout box with a white border and a green arrow points to a blue button labeled "Switch Forms" in the top right corner. The button has a small icon of a computer monitor and a blue arrow. Below the button, there is a section titled "Agency Information" with a blue box containing an information icon and the text "Fields marked with an * are required fields." At the bottom, there is a yellow box with 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.

A screenshot of the same web application interface as above, but with a modal window open. The modal 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 name of the form and its status. A green callout box with a white border and a green arrow points to the table. The callout box contains the text: "The Form you are currently on is not clickable. All changes made to your current form are automatically saved. The other forms are available to choose." The table lists several forms, all with a status of "Not Started".

Form Name	Status
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			
<u>Agency Information*</u>			
<u>Required Documents</u>		Not Started	
After School Program		Not Started	<input checked="" type="checkbox"/> Include?

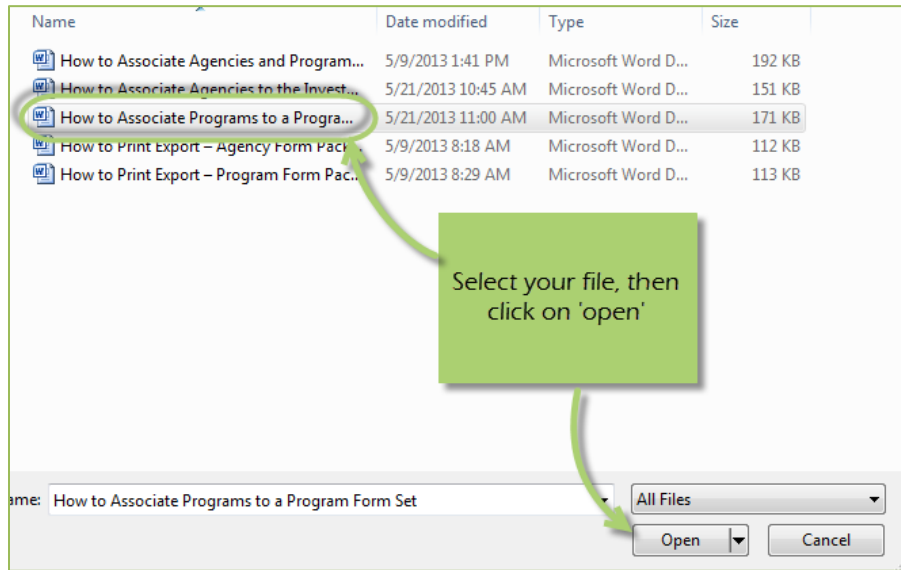
The Attachments form displays the same as other forms.

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

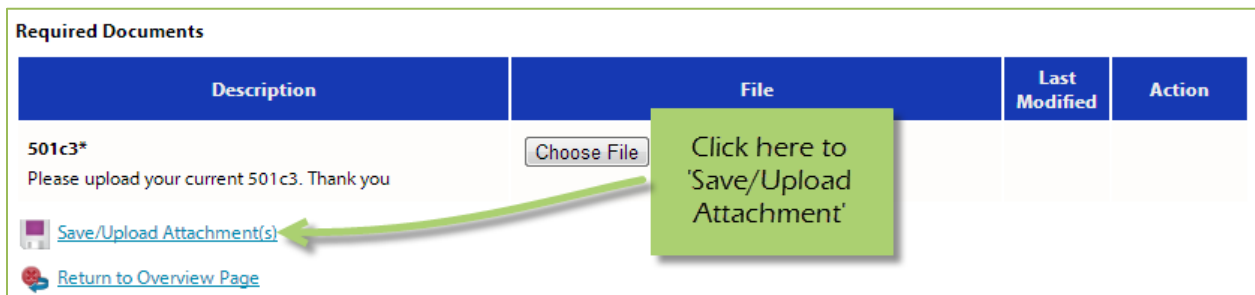
Required Documents			
Description	File	Last Modified	Action
501c3* Please upload your current 501c3. Thank you	<input type="button" value="Choose File"/> No file chosen		
Save/Upload Attachment(s)			
Return to Overview Page			

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.

Required Documents			
	File	Last Modified	Action
501c3 Please upload your current 501c3. Thank you	 e-CImpact Agency Training Manual - 2013.pdf	Deja Vu 5/28/2013 2:44 PM	Delete



Click on document to "View" it

[Return to Overview Page](#)

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		Not Started	
After School Program		Not Started	<input checked="" type="checkbox"/> Include? 

The Attachments form displays the same as other forms.

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

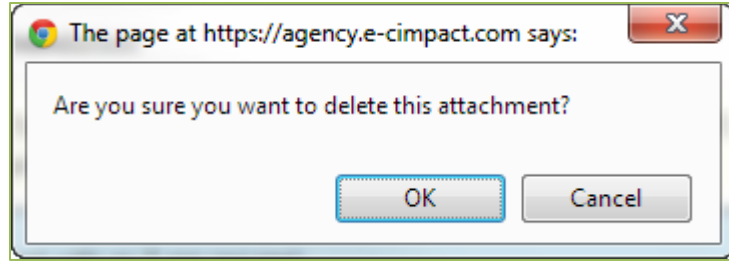
Required Documents			
Description	File	Last Modified	Action
501c3* Please upload your current 501c3. Thank you	 e-CImpact Agency Train	Deja Vu 5/28/2013 2:44 PM	Delete

Click here to 'Delete' your attachment

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

[Return to Overview Page](#)

Step 3: Confirm you would like to delete this attachment



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)	Last Modified	Status	Action
Children's Home Foundation	5/22/2013 2:56 PM (CST)	In Progress	
Agency Information*	Deja Vu 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		<div style="background-color: #c8e6c9; padding: 10px; border: 1px solid #ccc;">After review - Click here to mark form completed</div>
Save My Work And Return To Previous Page		
Save My Work and Mark as Completed		
Return To Overview Page		

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 StartedIn ProgressReady To SubmitSubmitted

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.

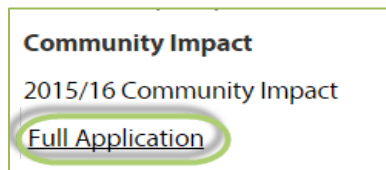
Printing Options

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.

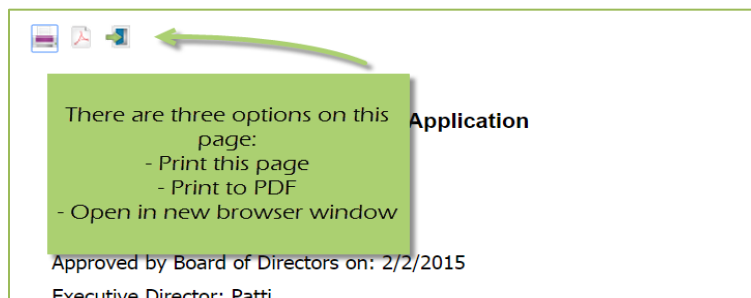


Step 2: Click on 'Print/Review Options' box in the upper right hand corner of the application main page.

Letter of Intent Status [View Printable Version of this Entire Letter of Intent](#)

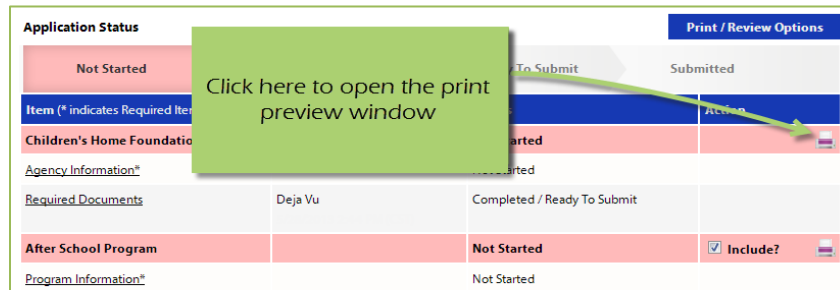
Item (* indicates Required Item)	Last Updated	Status	Options
abc agency		Not Started	
Agency Information*		Not Started	
Board Information*		Not Started	
Patriot Act Compliance*		Not Started	

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

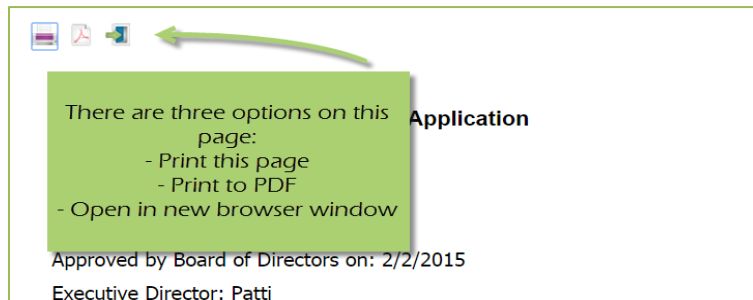


Agency Packet

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

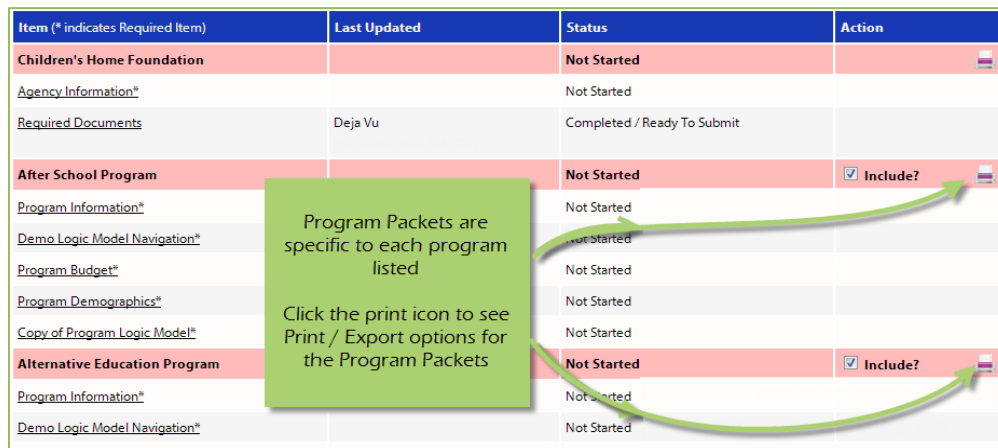


Step 2: Select the 'Print' option you would like to use, continue on to print.




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.



Individual Forms

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

[View Printable Version of this Entire Letter of Intent](#) 

Item (* indicates Required Item)	Last Updated	Status	Options
**Ramsay Marchese Services (test)		Not Started	
Organization Information*		● Not Started	
Hepler Helping Hands	9/26/2018 10:31 AM (CST)	In Progress	

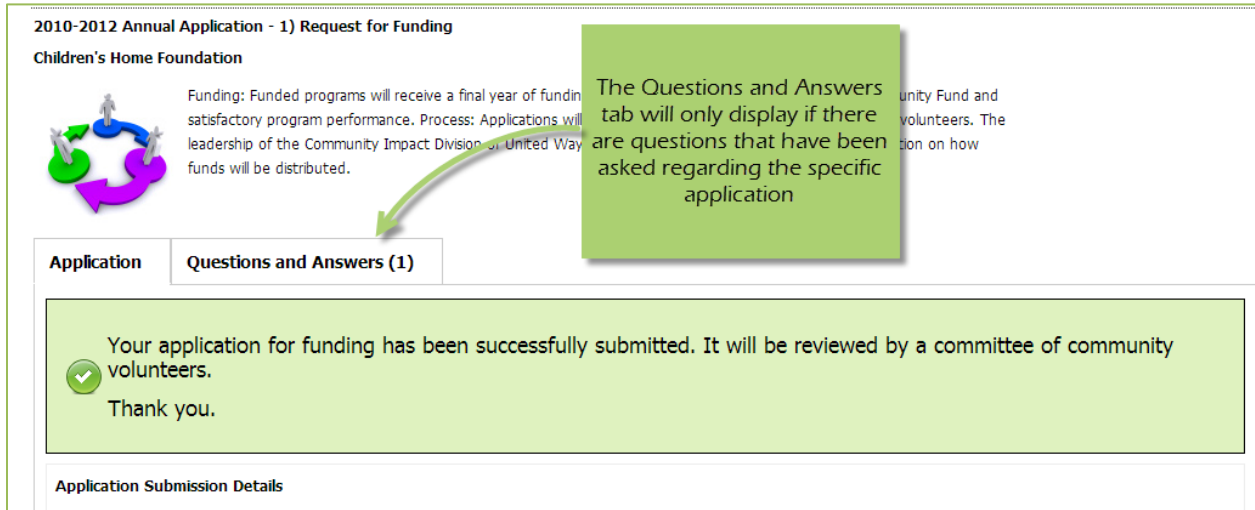
Step 2: In the lower right hand corner of your form are the option for printing.



Questions and Answers

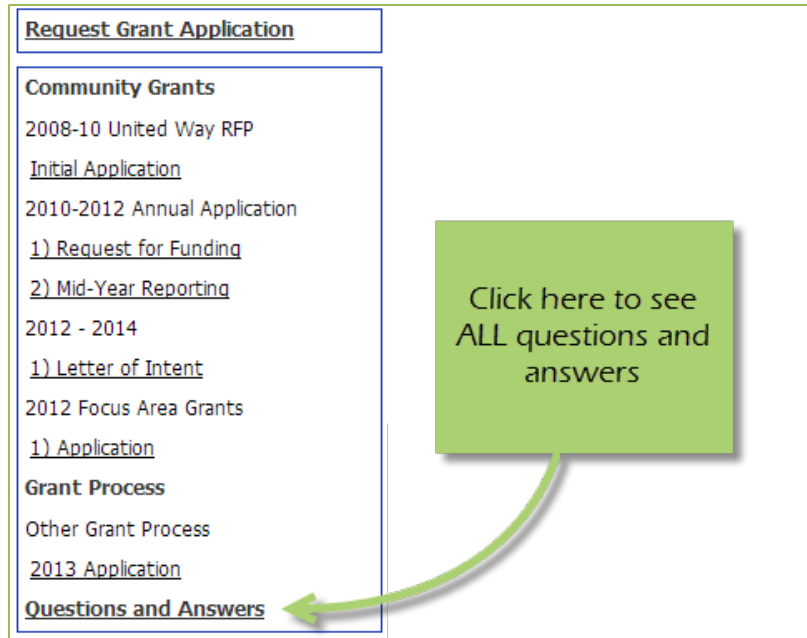
There are two ways to access 'Questions and Answers'.

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



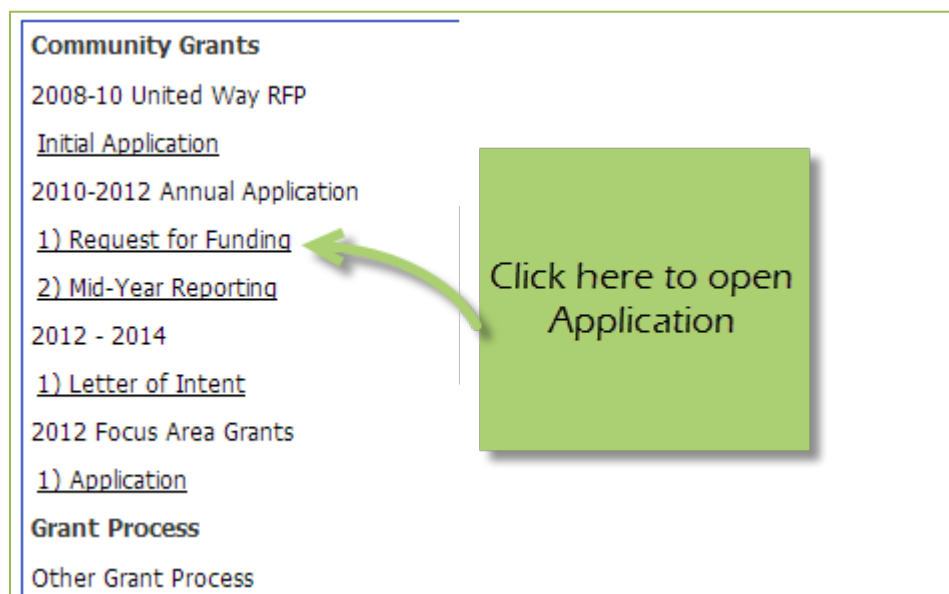
The screenshot displays a web application interface for a '2010-2012 Annual Application - 1) Request for Funding' for 'Children's Home Foundation'. The page features a navigation bar with two tabs: 'Application' and 'Questions and Answers (1)'. A green callout box with a white border and a drop shadow points to the 'Questions and Answers (1)' tab, containing the text: 'The Questions and Answers tab will only display if there are questions that have been asked regarding the specific application'. Below the navigation bar, a green message box with a white border and a drop shadow contains a green checkmark icon and the text: 'Your application for funding has been successfully submitted. It will be reviewed by a committee of community volunteers. Thank you.' At the bottom of the page, there is a section titled 'Application Submission Details'.

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

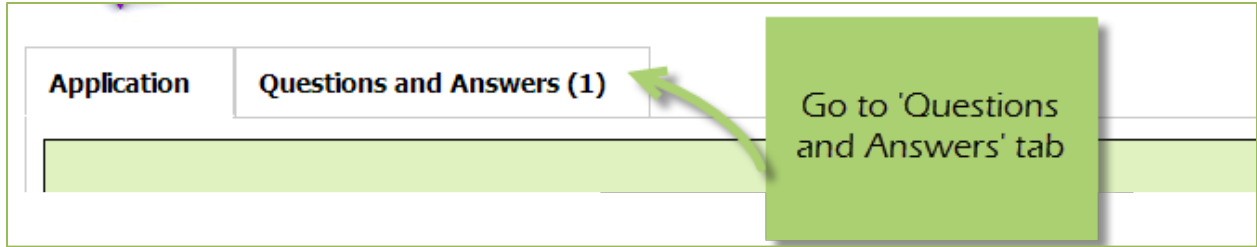


Responding to a Question – In the Application

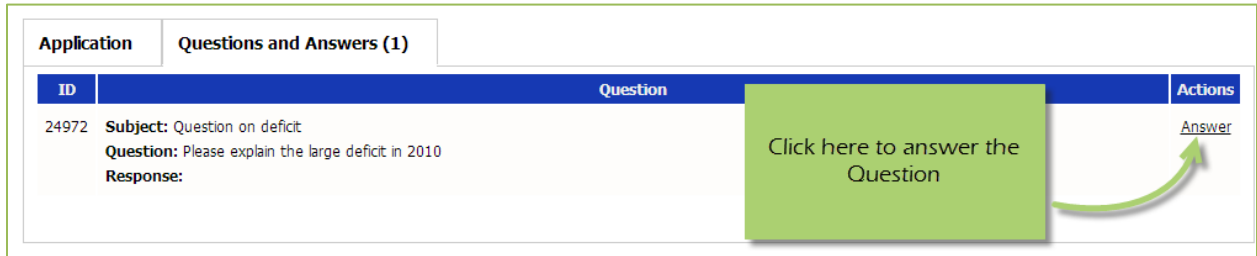
Step 1: Open the application



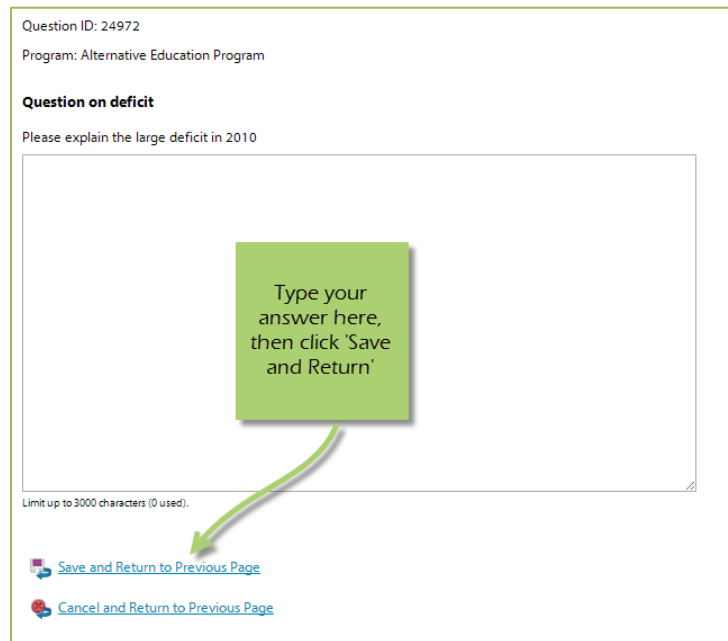
Step 2: Go to 'Questions and Answers' tab



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 Aly McMillan, 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

The image shows a table titled 'Questions and Answers' with the following data row:

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

A green callout box with the text 'Click here to respond to the question' has an arrow pointing to the 'Respond' button in the 'Action' column. Below the table, there is a link: '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

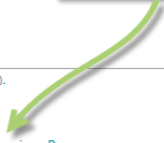
Question on deficit

Please explain the large deficit in 2010

Limit up to 3000 characters (0 used).

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

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



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	
Export Questions and Answers To Adobe PDF						

Click here to Export Questions to PDF

