



Community Impact Management

Agency Training Manual

United Way of Champaign
County

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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

<https://agency.e-cimpact.com/login.aspx?org=15070U>

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:

It's recommended to use your email address for your username since it is unique.

For Others: *if you do not know or remember your username, please contact Carolyn Butterfield.*

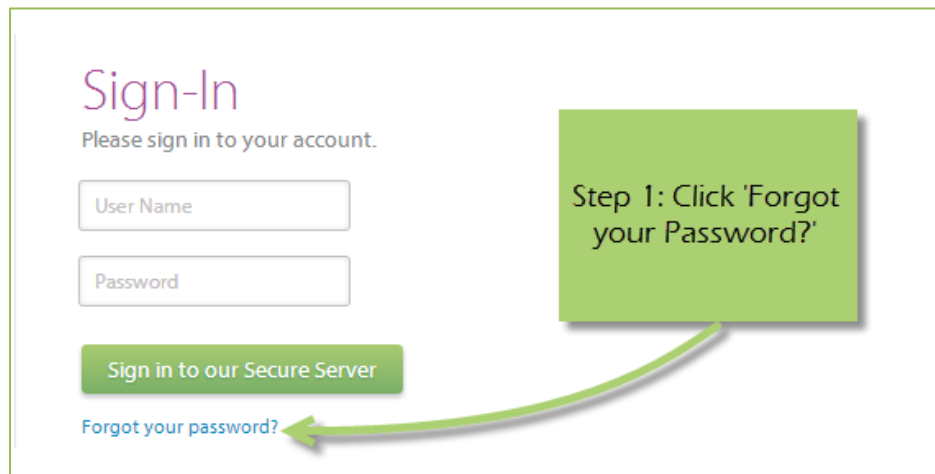
Step 1: Enter your username and password

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 text 'Community Impact Management' and 'AGENCY SITE' below it. The main section is titled 'Sign-In' with 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 password field, with a blue link 'Forgot your password?' underneath it. A large green arrow points from a callout box 'Step 1: Enter Username and Password' to the 'User Name' field. Another green arrow points from a callout box 'Step 2: Click 'Sign in to our Secure Server'' to the 'Sign in to our Secure Server' button. Below the sign-in section is a section titled 'New to e-IMPACT?' with a large green arrow pointing to the right. It contains the text 'Don't have an account?' and 'Create an account to apply for available grants', followed by a green button 'Click here to create a new Account'. At the bottom left is a 'Secured by Thawte' logo with the date '2013-05-28'. At the bottom right is the text 'POWERED BY seabrooks'. The footer at the very bottom reads '© 2013 e-IMPACT, Community Impact Management'.

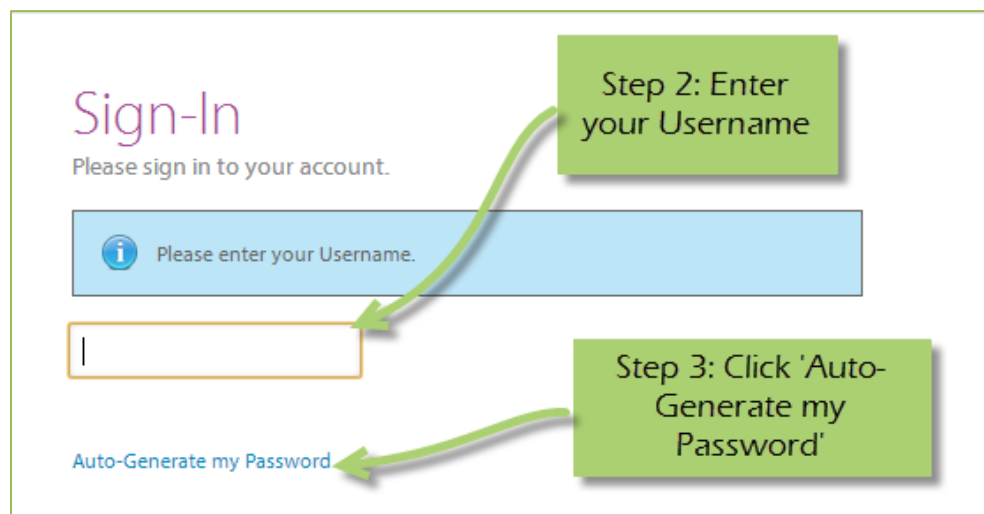
Forgot Password

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 Carolyn Butterfield.

Registering a New Agency

If you are not yet a United Way of Champaign County 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'**

e-IMPACT™
Community Impact Management
AGENCY SITE

Sign-In
Please sign in to your account.

User Name
Password

Sign in to our Secure Server

[Forgot your password?](#)

New to e-IMPACT?

Don't have an account?
Create an account to apply for available grants

[Click here to create a new Account](#)

Step 1: Click here to create a new account

Secured by Thawte
2013-05-28

Secured by Thawte
© 2013 e-IMPACT, Community Impact Management

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'

[Cancel and Return to Login Page](#)

[Next](#)

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-CImpact 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 Statement:

Unit up to 750 characters (0 used).

Unit 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 username and 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.

Please note what username and password you create.

Password

-- abcdefgh (invalid; contains only letters) (8 characters)

-- pass\$w0 (invalid; contains only letters and numbers) (8 characters)

-- 123456! (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.

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'

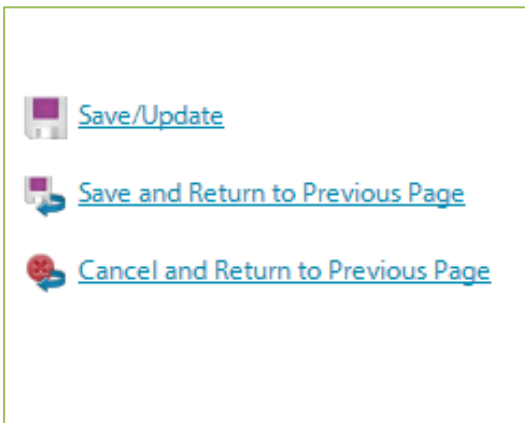
Complete Registration ➔

 [Cancel and Return to Login Page](#)

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

Common Navigation

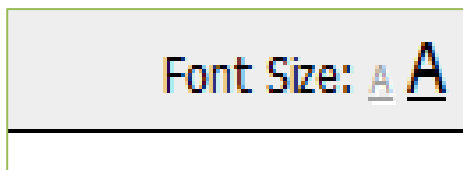
The navigation links in e-Clmpact are consistent throughout the site.



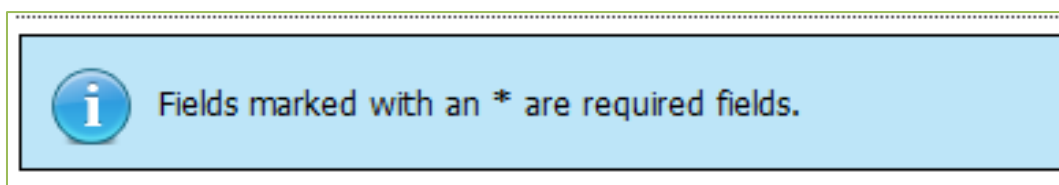
Save/Update: Refreshes the page while saving any changes made to your data.

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.



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 remaining of 16:27. The font size is set to "A".

The main content area is divided into several sections. On the left, a sidebar contains a "Family Service Agency" menu with links to Home, Agency Profile, Additional Info, Users, Mission Statement, and Project Profiles. Below this is a "Schedule" section with links to Current Meeting (1), Meeting Archive (1), and On-Site Visits Archive (1). Further down is a "Request Grant Application" link, and at the bottom is a "Resource Center" section with links to 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 reminder to "Please RSVP for this Meeting!". Below this is a "Calendar" section for February 2013, showing a grid of dates with the 14th highlighted. To the right of the calendar, there are sections for "Today's Schedule: Thursday, February 14, 2013" and "Schedule for February", both indicating "None Scheduled".

At the bottom of the main content area is a section titled "Our Work through Initiatives" with two updates: "African American Initiative Update" and "Immunization Initiative Update".

Four green callout boxes with arrows point to specific areas of the page:

- 1. Account Management** points to the "Signout" link in the top header.
- 2. Agency Information** points to the "Agency Profile" link in the sidebar.
- 3. News, Events, and Calendars** points to the "New Meeting" section.
- 4. Application and Resource Center** points to the "Request Grant Application" link.

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:

- Passwords must be at least 8 characters long
- Must not contain " % or blank spaces
- Must meet at least 3 of the 4 following requirements:
 - At least 1 capital letter
 - At least 1 lowercase letter
 - At least 1 number
 - At least one symbol (allowed symbols are !@#\$%^&*())


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 Carolyn Butterfield 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-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.

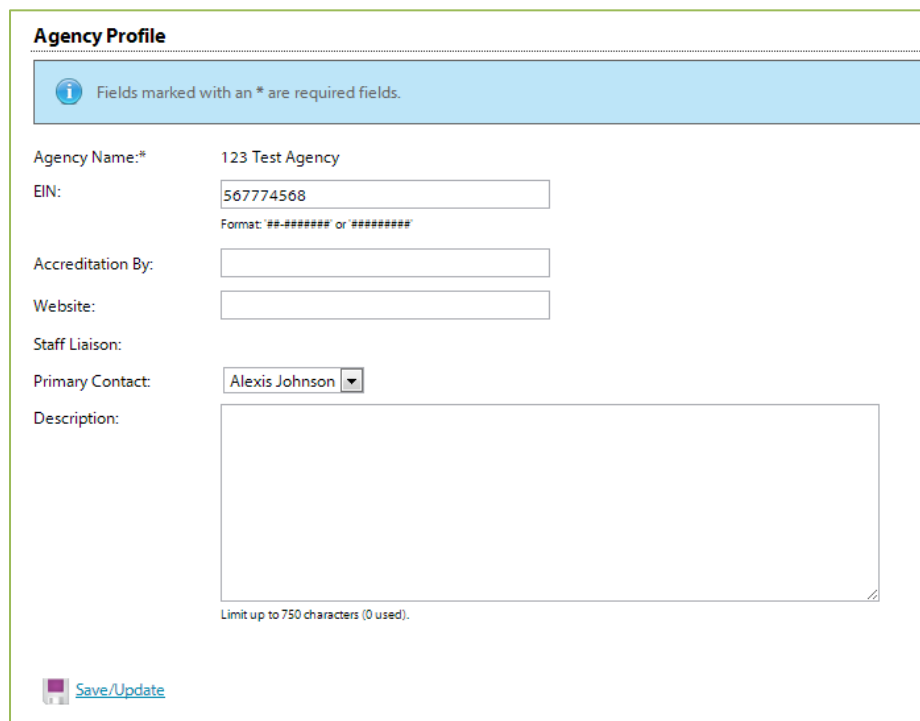
[Agency Information](#)

The Agency Information section is where account information, contacts, statements (mission/vision/agency) and program information are 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:" 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 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, addresses, 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 | | | | |

'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>Edit</div></div> | | | | | |


The agency contact profile page is like 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 contact's email address is commonly used as the username due to email addresses being unique. Please refer to revised password requirements under **Change Password.*

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\$Sw0rd (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:*

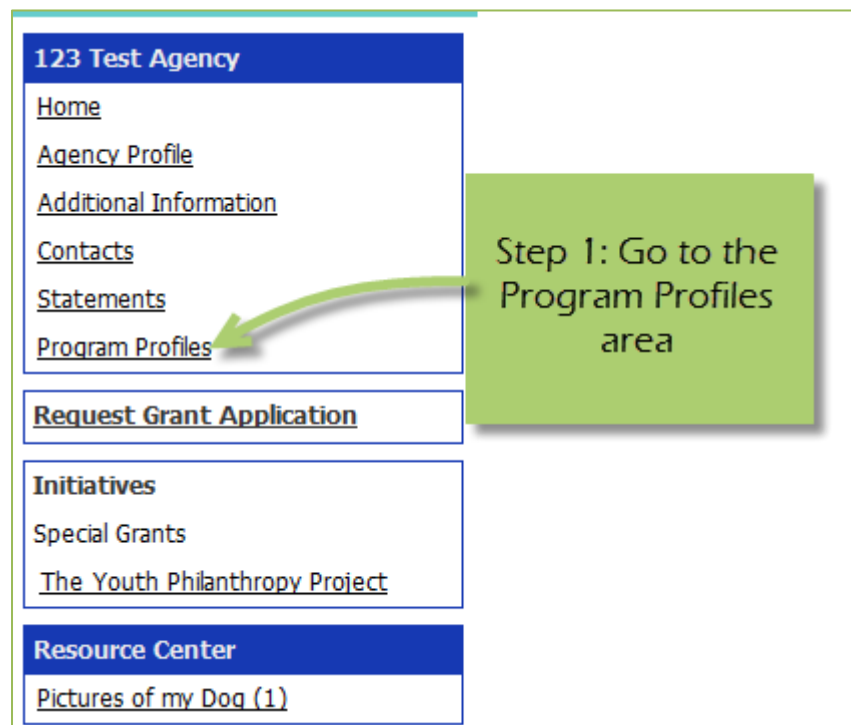
no value

 [Save/Update](#)

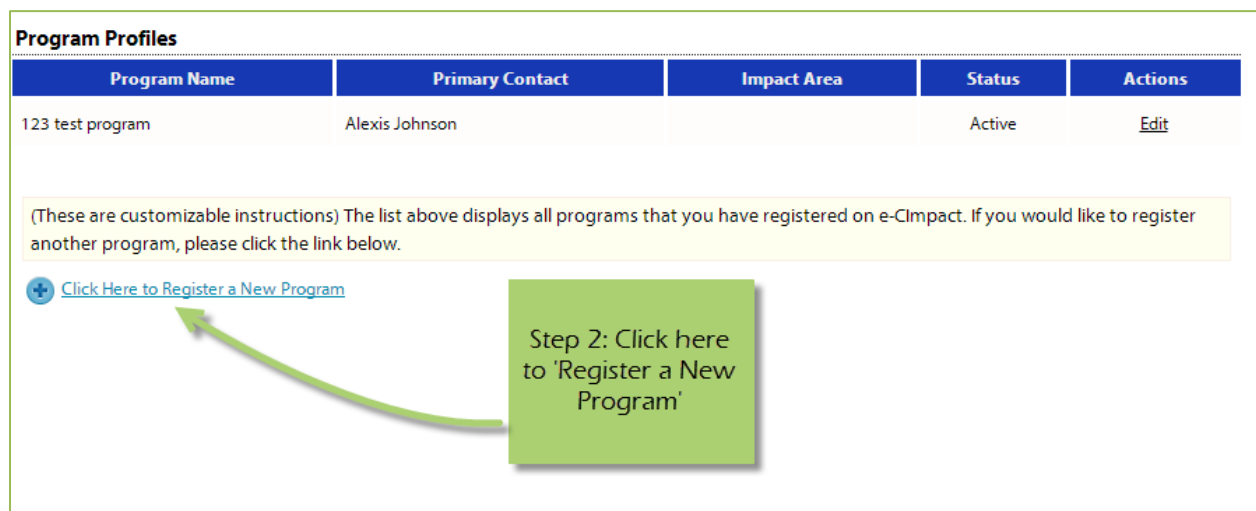
 [Return To Previous Page](#)

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

Calendar - (we are not currently using this feature)

The calendar area will display any events or site visits you have RSVPs for. Some news items will be displayed 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.

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

Site Visits – (we are not currently using this feature)

When offered, you can 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.

The screenshot shows a web application interface for '123 Test Agency'. On the left is a navigation menu with links: Home, Agency Profile, Contacts, Program Profiles, Schedule, Current Site Visit (2), Request Grant Application, Initiatives, Special Grants, The Youth Philanthropy Project, Resource Center, and Pictures of my Dog (1). The main content area is titled 'Schedule > Current Site Visit' and contains a table:

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

Two green callout boxes with arrows provide instructions: 'Step 1: Click on 'Current Site Visit'' points to the 'Current Site Visit (2)' link in the menu, and 'Step 2: 'Reserve Time Slot'' points to the 'Reserve Time Slot' link in the table's Actions column.

Step 3: Choose the date and address desired.

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

The screenshot shows the 'Schedule > Current Site Visit > Reserve Time Slot' form. At the top, a blue banner states: 'Fields marked with an * are required fields.' The form fields are:

- Site Visit: 2013 Education Site Visits
- Date*: 4/25/2013 9:00 AM (dropdown)
- Address*: 1248 Any Sreet, Anytown, IL 98277, U.S.A. (dropdown)
- Staff Liaison: Kate Attea
- # of Volunteer(s): 0

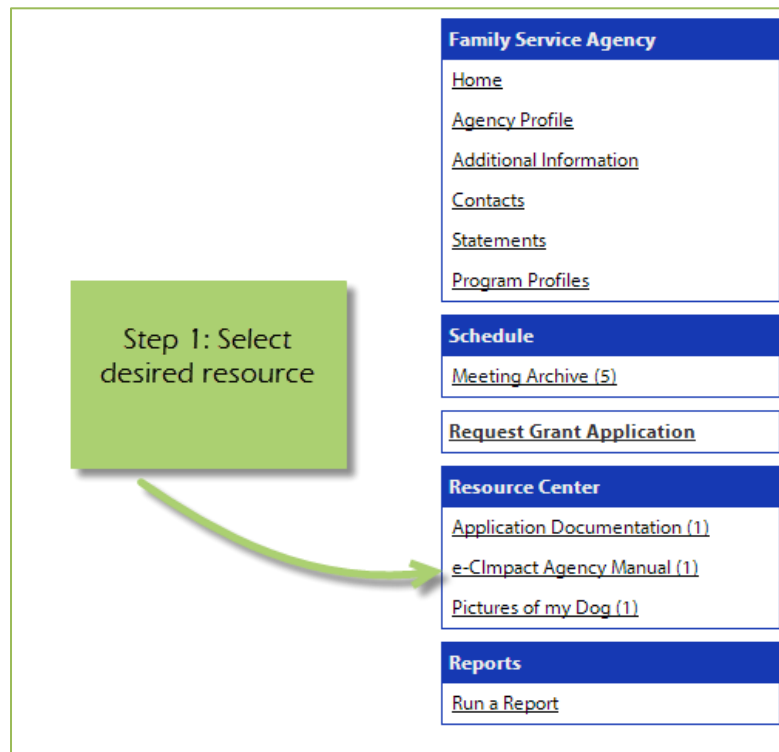
Below the fields are four buttons: 'Save/Update', 'Save and Return to Previous Page', 'Cancel and Return to Previous Page', and 'Cancel this Site Visit Sign-up'. Two green callout boxes with arrows provide instructions: 'Step 3: Select the date and address' points to the Date and Address dropdowns, and 'Step 4: Save' points to the 'Save/Update' button.

Resource Center

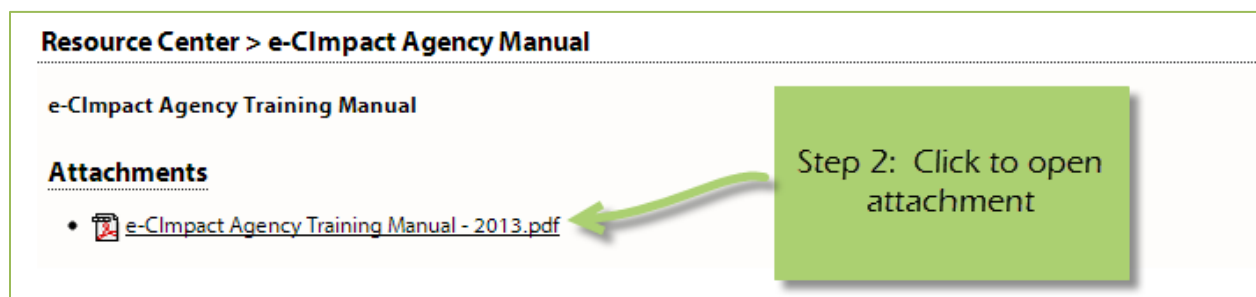
The agency resource center is where you will be able to find any documents you may need to reference from United Way of Champaign County. The resource center is in the lower half of the left-hand navigation.

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 can easily see how much of your application you have submitted.

The screenshot displays the 'Form Status' interface. At the top, a progress bar shows four stages: 'Not Started' (highlighted in red), 'In Progress' (grey), 'Ready To Submit' (grey), and 'Submitted' (grey). Below the progress bar is a table with the following columns: 'Item (* indicates Required Item)', 'Last Updated', 'Status', and 'Action'. The table lists several items, including 'Children's Home Foundation' and 'Alternative Education Program'. The 'Status' column for all listed items is 'Not Started'. A green callout box with two arrows points to the 'Not Started' status in the progress bar and the 'Status' column of the table, containing the text: 'The top bar is the Overall Application status.' and '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.

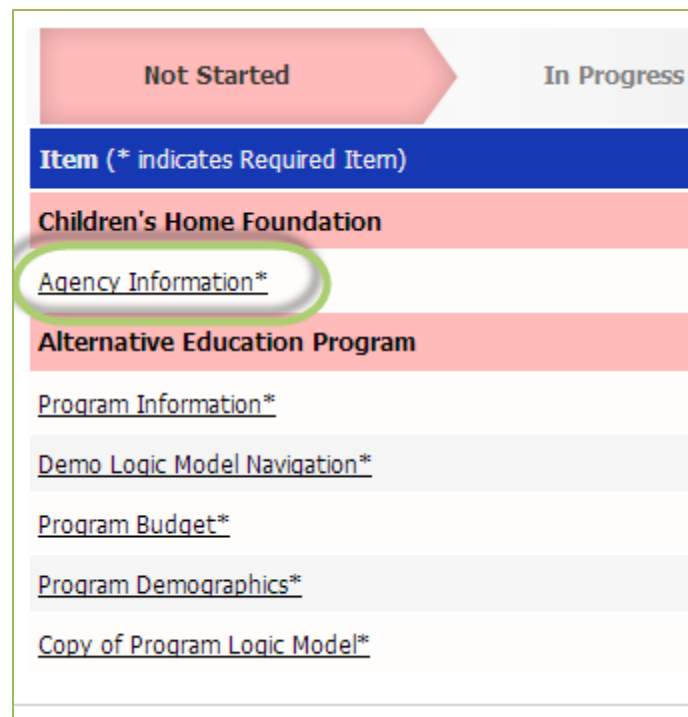
In Progress: If your form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

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 Carolyn Butterfield.

Entering Information

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

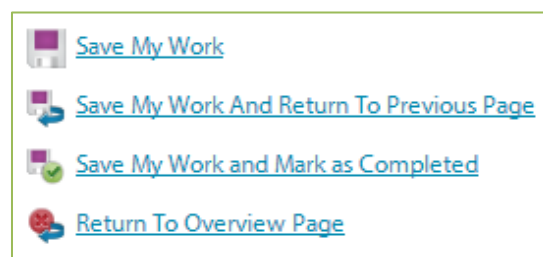


The screenshot shows a web application interface. At the top, there is a progress bar with two segments: 'Not Started' (red) and 'In Progress' (grey). Below the progress bar is a table with a blue header row labeled 'Item (* indicates Required Item)'. The table contains several rows, each with a red header and a white body. The first row is 'Children's Home Foundation'. The second row is 'Agency Information*', which is highlighted with a green oval. 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*'. The table is enclosed in a green border.





| 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 blue link. The options are: 'Save My Work' (with a floppy disk icon), 'Save My Work And Return To Previous Page' (with a floppy disk and back arrow icon), 'Save My Work and Mark as Completed' (with a floppy disk and checkmark icon), and '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](#)

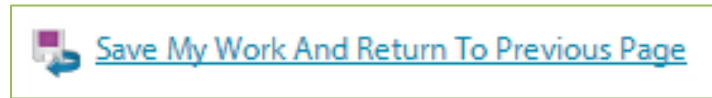
Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

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 red 'X' icon. Below the header is a table with two columns: the form name and its status. 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.', and 'The other forms are available to choose.' with arrows pointing to the 'Children's Home Foundation' and 'Alternative Education Program' rows in the table.

| 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

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.

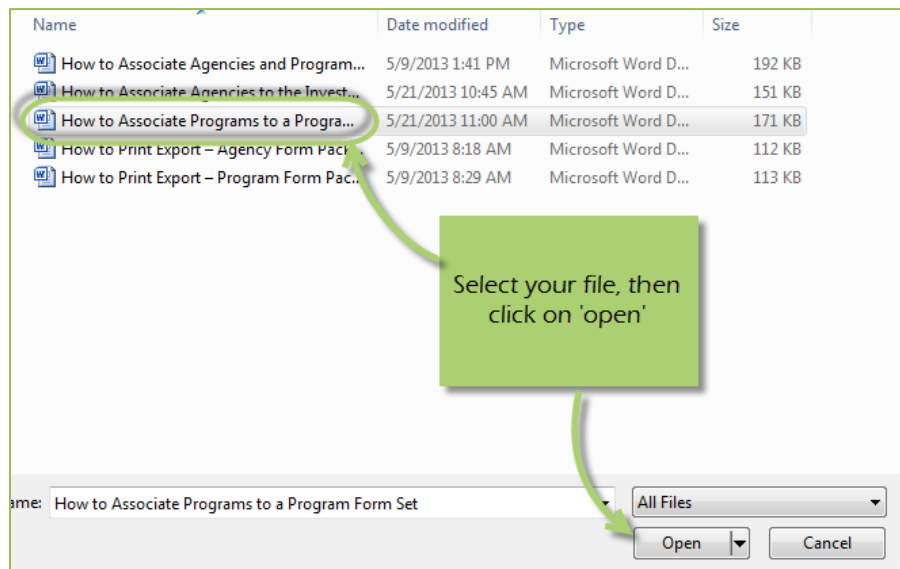
Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.

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

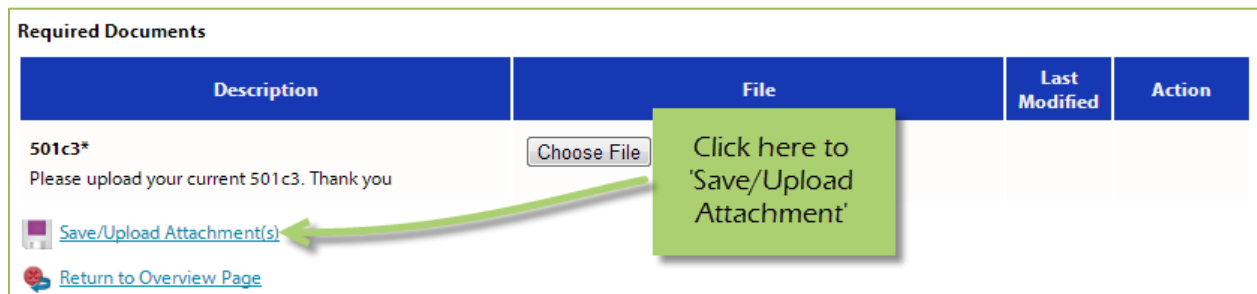
[Save/Upload Attachment\(s\)](#)
[Return to Overview Page](#)

Click here to 'Choose File'

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

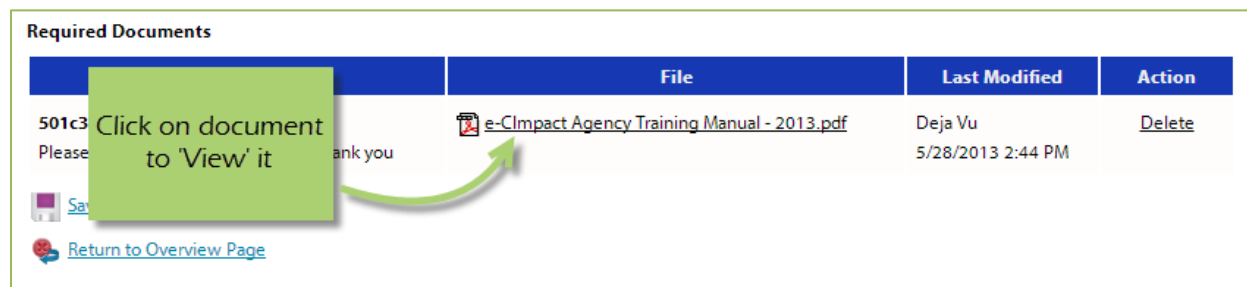


Step 4: 'Save/Upload Attachment(s)'



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? |

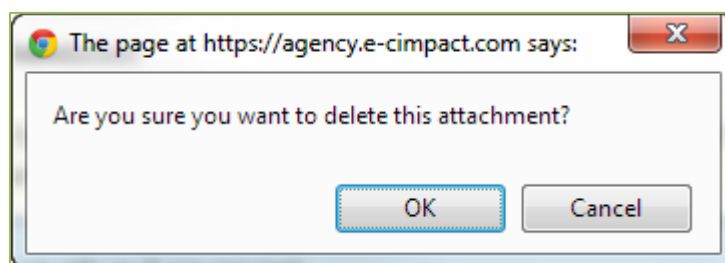
Step 2: Select 'Delete' next to the desired document.

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.





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](#)

 [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**

| 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



Not Started

In Progress

Ready To Submit

Submitted

[Print / Review Options](#)

| 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.

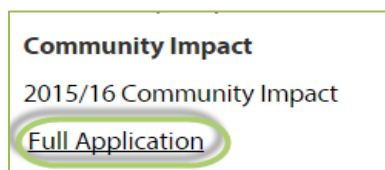
Printing Options

There are different levels you may print:

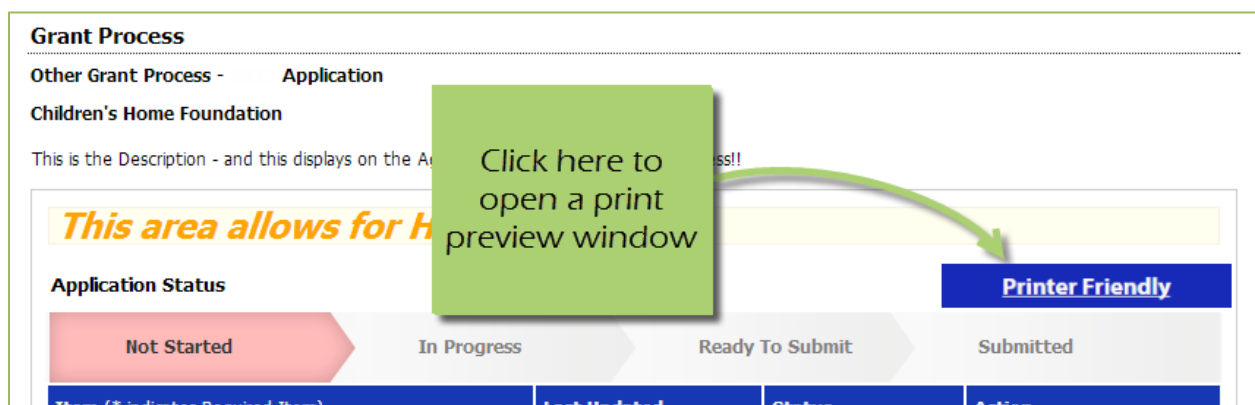
- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet– This will print all forms that are program specific.
- Individual Form – This will print the individual form.

The Entire Application

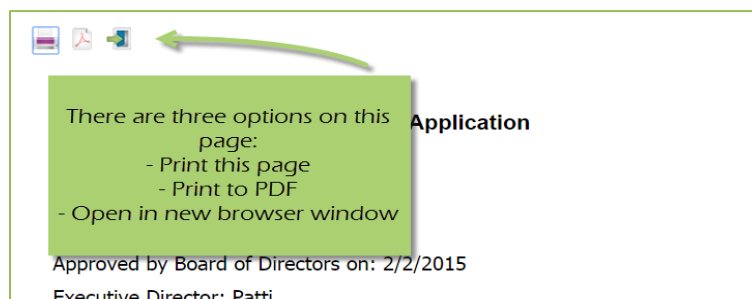
Step 1: Open the application by clicking on it in the left-hand navigation.



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

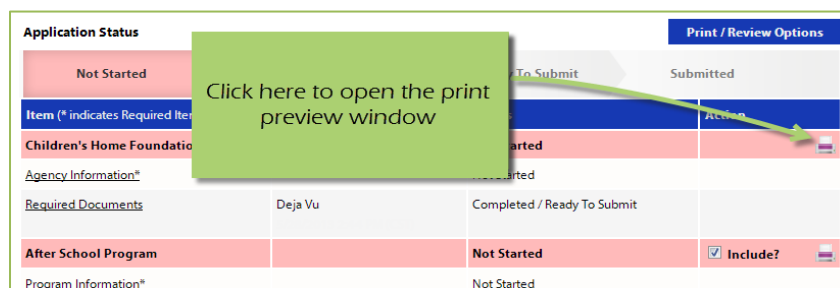


Step 3: Select the option you would like to use, continue to print.

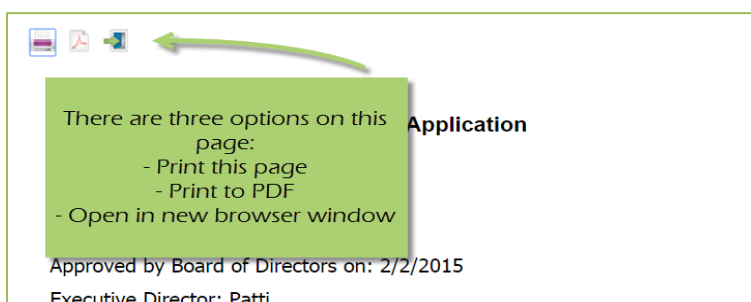


Agency Packet

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 | <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.

Application Status Print / Review Options

Not Started In Progress Ready To Submit Submitted

| 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.

[Save My Work](#)

[Save My Work And Return To Previous Page](#)

[Save My Work and Mark as Completed](#)

[Return To Overview Page](#)

[Printer Friendly](#)

Questions and Answers – (we are not currently using this feature)

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 of 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

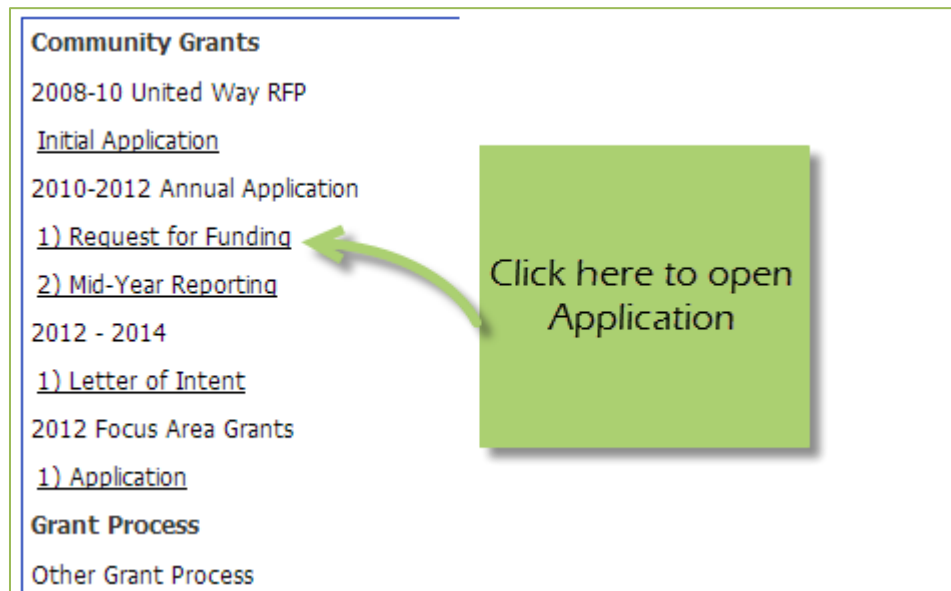
2013 Application

Questions and Answers

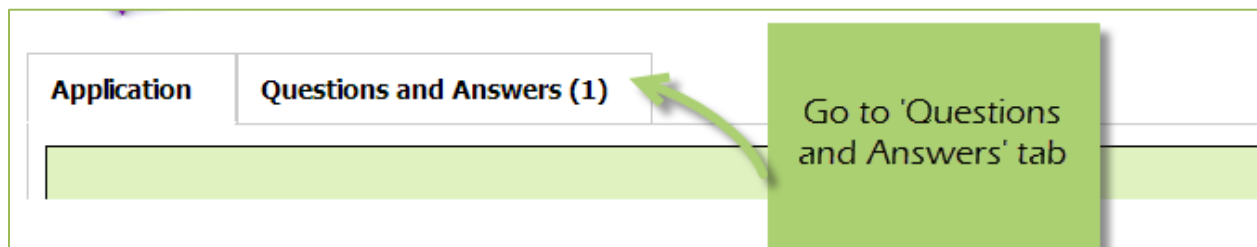
Click here to see ALL questions and answers

Responding to a Question – In the Application

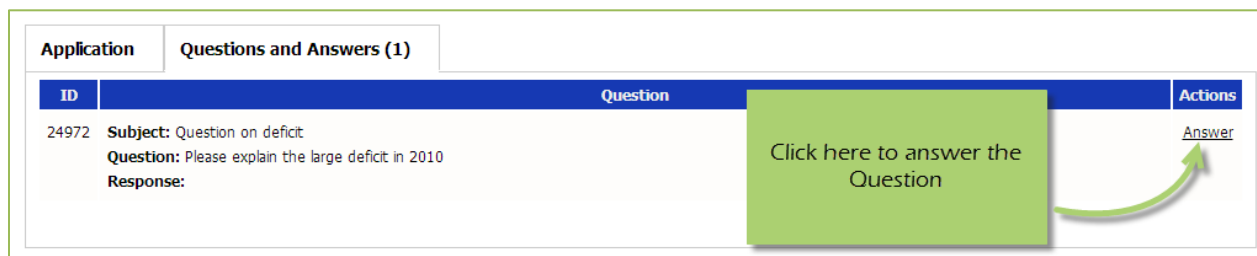
Step 1: Open the application.



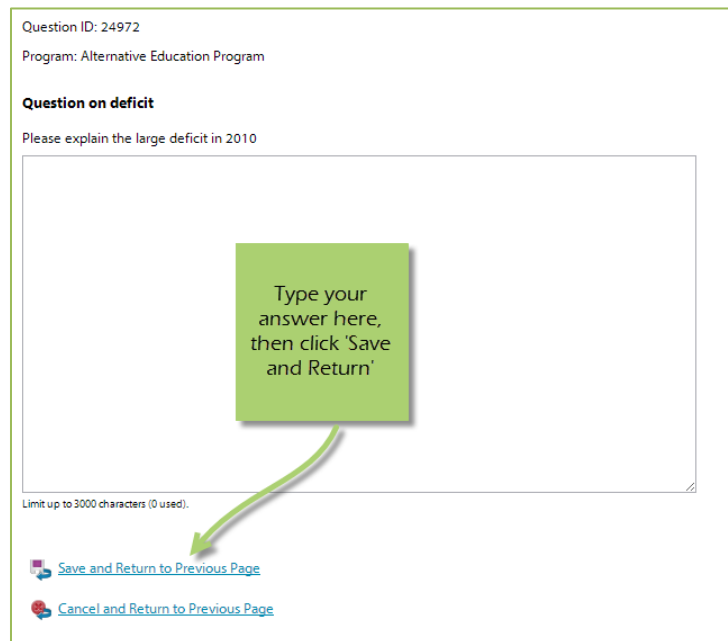
Step 2: Go to 'Questions and Answers' tab.



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 Carolyn Butterfield, 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 |

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

Click here to respond to the question

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 | 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 |

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

Click here to Export Questions to PDF