



Valley of the Sun
UNITED WAY

100
YEARS
100

For Support, please contact:

Agency Training Manual

ecimpact@vsuw.org

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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)

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

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

Registering a New Agency

If you are not yet a Valley of the Sn United Way Partner Agency, please proceed with site registration. Registration is required for all non-partner agencies. ***If your agency has submitted an application or report in the past you can skip this step.***

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



AGENCY SITE

New to e-Clmpact?

 Secured by Thawte
2013-05-28

Sign-In
Please sign in to your account.

Sign in to our Secure Server

[Forgot your password?](#)

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



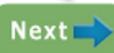
Step 2: Please read all directions carefully, and then click 'Next' to continue with your registration process.

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](#)

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

Next 

e-Clmpact™ 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-ClImpact account. The system will also automatically enter any information linked to the EIN entered.**

***Please remember to use your email address as your username when creating profile.**

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: Limit up to 750 characters (0 used).

Mission Statement: Limit up to 750 characters (0 used).

Address

Address Type: *

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: *

Email Address

Email Address Type: *

Email Address: *

Phone Number

Phone Number Type: *

Phone Number: *

Primary Contact Information

Contact Type: *

First Name: *

Last Name: *

Job Title:

Preferred Login

Please note what username and password you create.

Enter your characters not containing any white-space.

Required 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.

- abcdefg (valid, contains only letters)
- pa\$\$wo (valid, contains only numbers and special characters)
- 123456 (valid, contains only numbers)
- abcdefg (invalid, contains only letters)
- abx23 (invalid, less than 6 characters)

Preferred User Name: *

Password: *

Confirm Password: *

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

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 **Next →**

 [Cancel and Return to Login Page](#)

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

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

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.

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. A member of our Community Investment Team will review and approve/deny registration.

Adding Program(s) to Application

Once your agency has been approved you will need to add a program to your application.

From the grant homepage navigate to the section below. Add an existing program from the drop down or select 'Create a New Program and Assign it to this Application'

Assign Programs to this Application

At least one program is required for this application for funding.

To add a program to this application, select a program from the drop down (if available), or if there is no drop-down displayed, select 'Create a new Program.'

Click the link to 'Create a New Program and Assign it to this Application' to proceed to the Add new program profile page. Do not create duplicate programs.

Please ensure to click 'Complete Registration' on the Review page to successfully add your program to the application. When the Program Profile registration is complete, all of the forms for that program will display in your list of forms below.

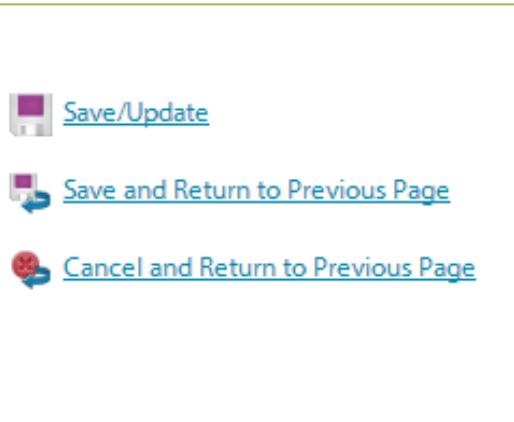
Select a Program:

→ [Assign Selected Program to the Application](#)

 [Create a New Program and Assign it to this Application](#)

Common Navigation

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



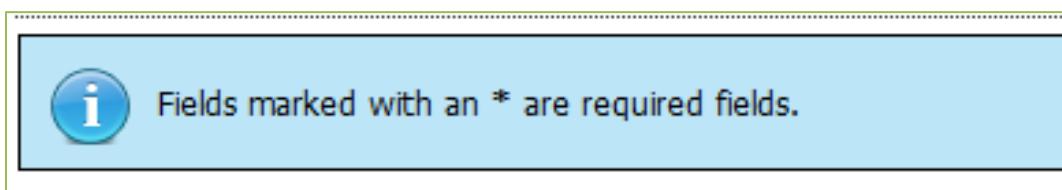
Save/Update: Refreshes the page while saving any changes made to your data.

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.

Font Size: 

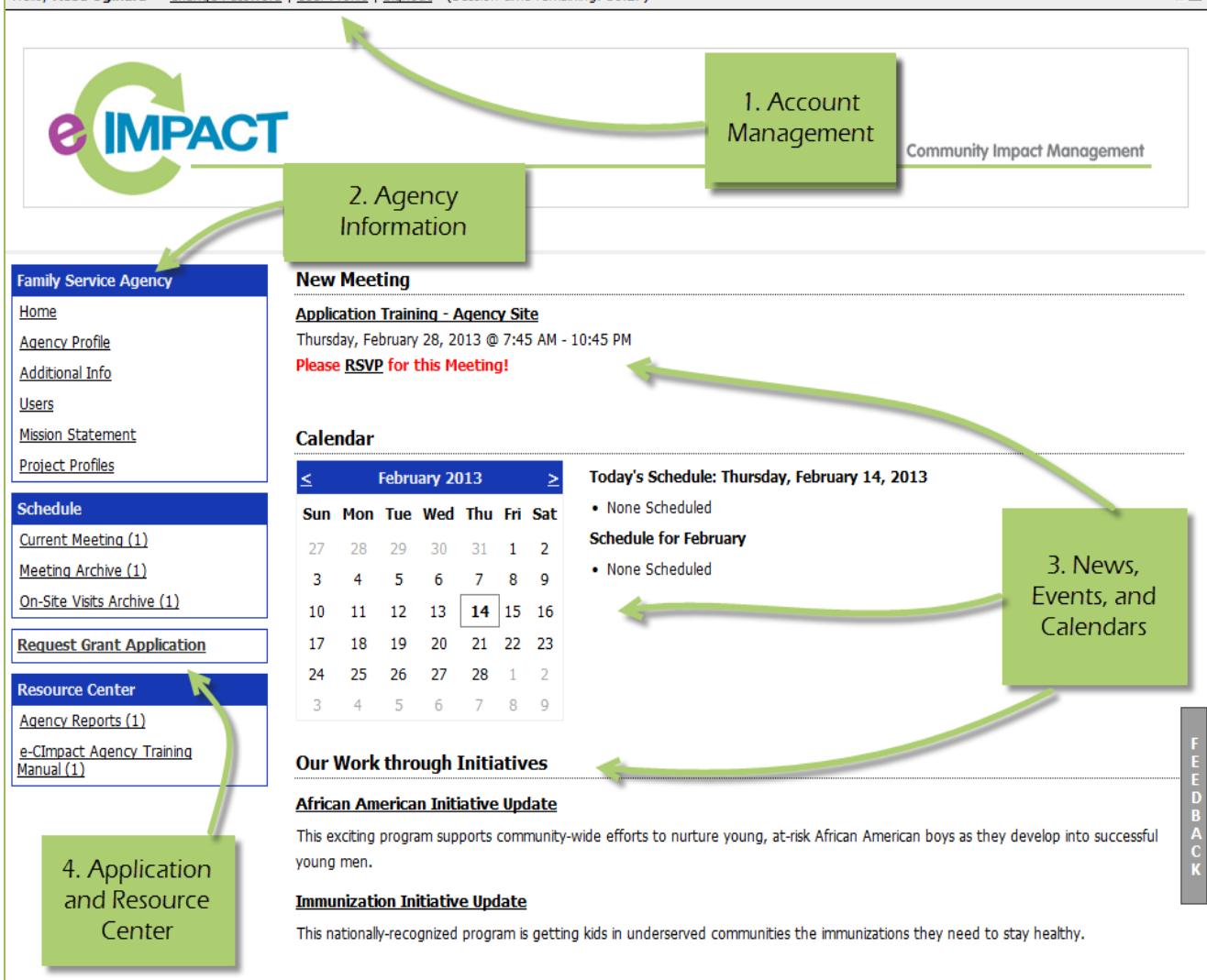
Changing the Font Size: Located in the upper right hand corner of the agency site, click the large 'A' to increase the font size. Click the smaller 'A' to decrease the font size.



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



Account Management

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

Agency Login

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

For New Organizations:

When creating new account. Please remember to use your email address as your username when creating profile.

Preferred Login

Please enter the contact's email address as the Username.

Preferred User Name:*

Password:*

Confirm Password:*

[Previous](#)

 [Cancel and Return to Login Page](#)

For Others: *if you do not know or remember your username and password, please contact ecimpact@vsuw.org*

Step 1: Enter your username and password

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

e-IMPACT™
Community Impact Management

AGENCY SITE

New to e-Clmpact?

Sign-In
Please sign in to your account.

User Name
Password

Sign in to our Secure Server

Forgot your password?

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

Click here to create a new Account

Secured by Thawte
2013-05-28
© 2013 e-Clmpact, Community Impact Management

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Forgot Password

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

Sign-In
Please sign in to your account.

User Name
Password

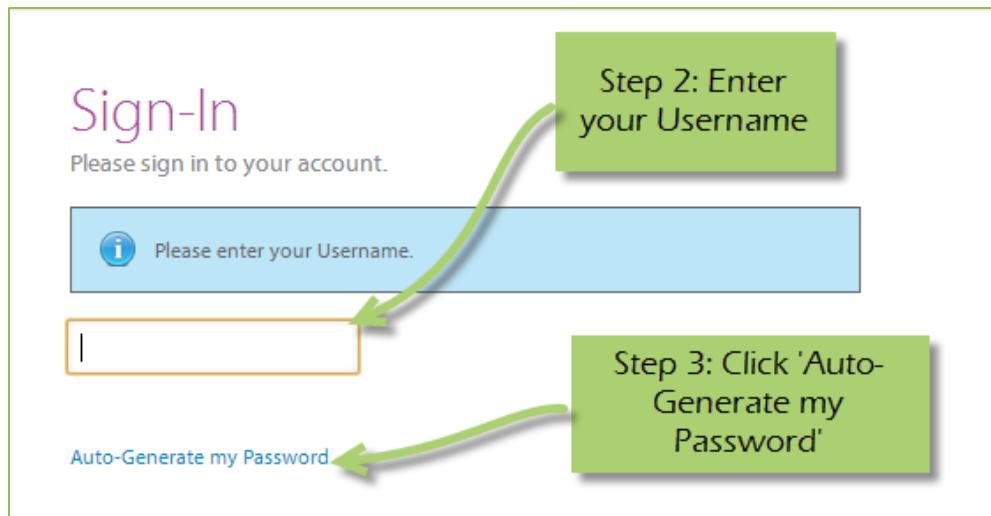
Sign in to our Secure Server

Forgot your password?

Step 1: Click 'Forgot your Password?'

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 ecimpact@vsuw.org

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 eClImpact@vsuw.org to reactivate the user account.

Contacts

Fields marked with an * are required fields.

Primary?

Include in all Emails?

Active?

Type:*	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text" value="Executive Director"/> ▼
Prefix:	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text"/> ▼
First Name:*	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text" value="Alexis"/>
Middle Initial:	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text"/>
Last Name:*	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text" value="Johnson"/>
Suffix:	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text"/> ▼
Company:	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text"/>
Job Title:	<input style="border: 1px solid #ccc; padding: 2px; width: 100%;" type="text"/>

[Save/Update](#)

[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

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

Signout

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

Agency Information

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



Agency Profile

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

A screenshot of an "Agency Profile" update form. The form fields are: Agency Name* (123 Test Agency), EIN (567774568, Format: ##-##### or #####-##), Accreditation By (input field), Website (input field), Staff Liaison (dropdown menu: Alexis Johnson), and Description (text area with placeholder: Limit up to 750 characters (0 used)). At the bottom is a "Save/Update" button.

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

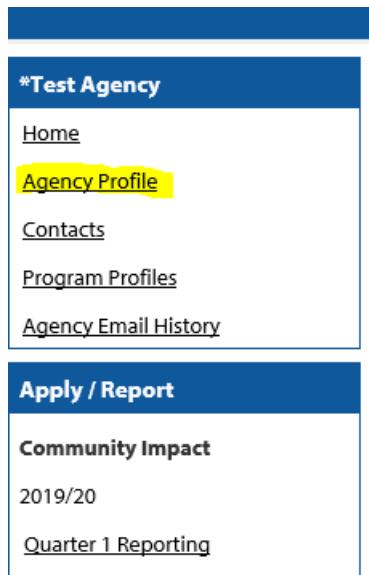
You may also add, edit or delete account names, address, phone numbers and email addresses. Agencies are able to have multiple records for each section.

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							

Additional Program Locations

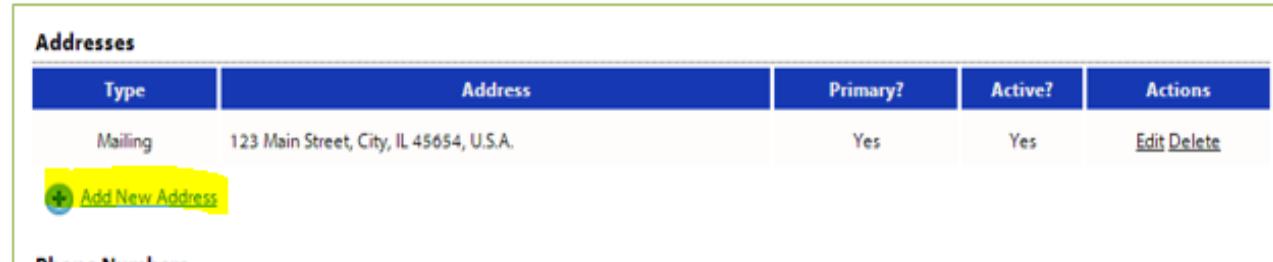
Important: Please update 'Addresses' section with all locations where your program(s) are held.

1. Located on left side toolbar of your Agency's site → Click on 'Agency Profile'



The screenshot shows the left sidebar of a web application. The sidebar has a dark blue header with the text "*Test Agency". Below this, there are several menu items: [Home](#), [Agency Profile](#) (which is highlighted with a yellow box), [Contacts](#), [Program Profiles](#), and [Agency Email History](#). Below the sidebar, there is a section titled "Apply / Report" with a sub-section "Community Impact" containing "2019/20" and "Quarter 1 Reporting".

2. Scroll to the address section → Click on 'Add New Address'



The screenshot shows the "Addresses" section of the application. It features a table with columns: Type, Address, Primary?, Active?, and Actions. There is one existing row: Type is "Mailing", Address is "123 Main Street, City, IL 45654, U.S.A.", Primary? is "Yes", Active? is "Yes", and Actions includes "Edit" and "Delete". Below the table is a button labeled "+ Add New Address" with a yellow box around it.

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

3. Required fields: [Address Type]; [Address Line 1]; [City]; [State]; [Zip Code]

Agency Profile > Addresses > Add New Address

 Fields marked with an * are required fields.

Confidential?
 Primary?

Address Type: *

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: *

Description:

Limit up to 255 characters (0 used).

 [Save/Update](#)

 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)

4. Please provide a short description of program type held at this location.
5. Click 'Save and Return to Previous Page'
6. Repeat for any additional program locations.

Agency Contacts

- Confidential?
- Primary?
- Active?

When adding a new record, or updating existing records, be sure to select 'Active' if contact is currently involved and is an official representative of your agency and/or program.

'Primary' can only be selected for one record. **IMPORTANT:** Primary contact is recommended to be assigned to the person who is the first point of contact for your Agency. This contact will receive all alerts such as reporting reminders, updates and deadline notifications.

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	Executive		Yes		Edit

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

- Name and preference
- Email addresses

- Phone Numbers
- Addresses

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

Step 1: Click 'Request a Login'

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

Step 2: Enter username and password.

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

Request a Login Account for Rose Ogihara

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

Password Examples:

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

Contact Type: Grant Writer

Contact Name: Rose Ogihara

Username:*

Password:*

no value

Confirm Password:*

no value

 [Save/Update](#)

 [Return To Previous Page](#)

Updating Program Information

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

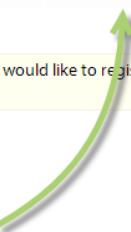
Step 2: Select 'Edit' next to the desired program.

Program Profiles				
Program Name	Primary Contact	Impact Area	Status	Actions
123 test program	Alexis Johnson		Active	<u>Edit</u>

(These are customizable instructions) The list above displays all programs that you have registered on e-ClImpact. 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 deactivate** 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**

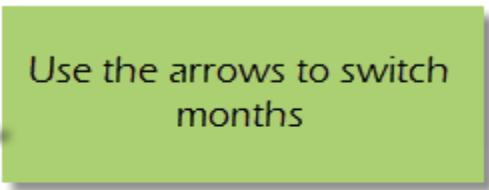
- None Scheduled

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.



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

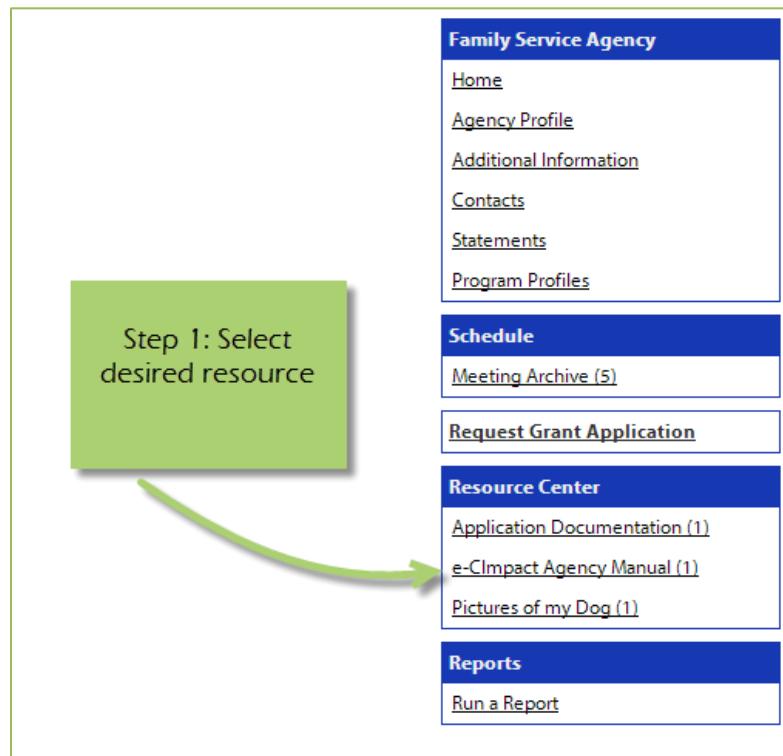
- None Scheduled

Resource Center

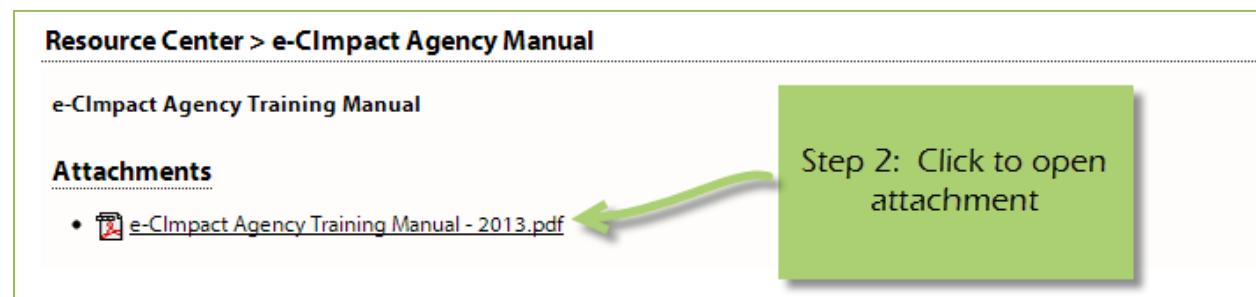
The agency resource center is where you will be able to find any documents you may need to reference from Valley of the Sn United Way. The resource center is located in the lower half of the left hand navigation.

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 screenshot shows a navigation menu on a website. At the top, there is a blue header bar with the text "Request Grant Application". Below this, the menu items are listed in a white box with a blue border:

- 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

A green callout box with a black border is positioned to the right of the menu, containing the text: "Step 1: Click the link for the application or grant you would like to apply for". A green curved arrow points from the bottom of the "2013 Application" link in the menu to the top left corner of the callout box.

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 table with the following structure:

Overall Application Status			
Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation		Not Started	<input type="button" value="Edit"/>
Agency Information*		Not Started	
Alternative Education Program		Not Started	<input checked="" type="checkbox"/> Include? <input type="button" value="Edit"/>
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	

A green callout box with a curved arrow points to the top bar, stating: "The top bar is the Overall Application status." Another green callout box with a curved arrow points to the "Status" column, stating: "The Status column is for the individual forms."

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

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

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

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

Entering Information

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

Not Started In Progress

Item (* indicates Required Item)

Children's Home Foundation

Agency Information*

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.



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

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.

Grant Process

Other Grant Process - 2013 Application
Children's Home Foundation
Status: Not Started

Agency Information

Fields marked with an * are required fields.

***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 1: Click here to see a list of other forms available

Switch Forms

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

Grant Process

Other Grant Process - 2013 Application
Children's Home Foundation
Status: Not Started

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.

Switch Forms

At any time you may select another form to work on. Your work on this form will be saved automatically.

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

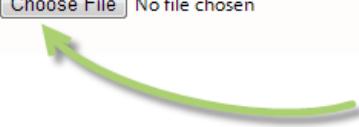
The Attachments form displays the same as other forms.



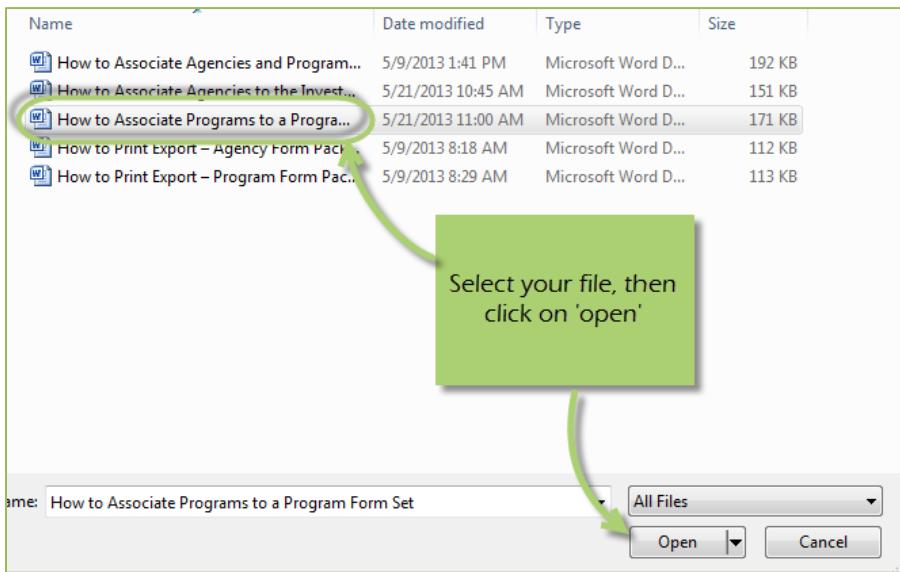
Step 2: Once you have confirmed your document meets the upload requirements, click 'Choose File'.

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

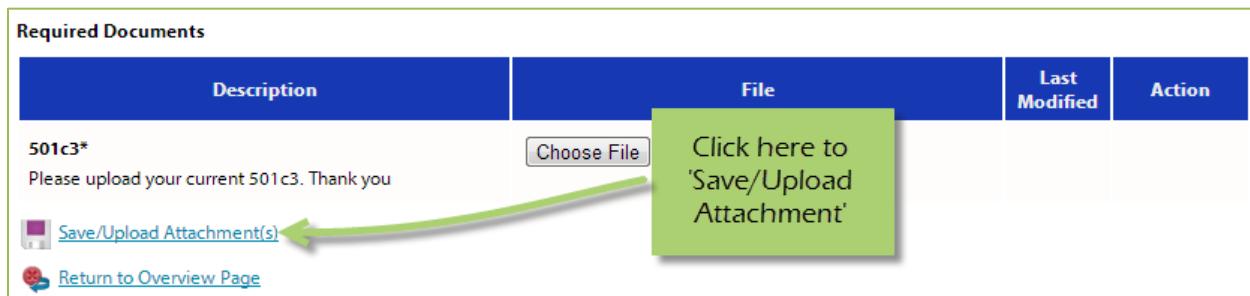
Click here to 'Choose File'



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

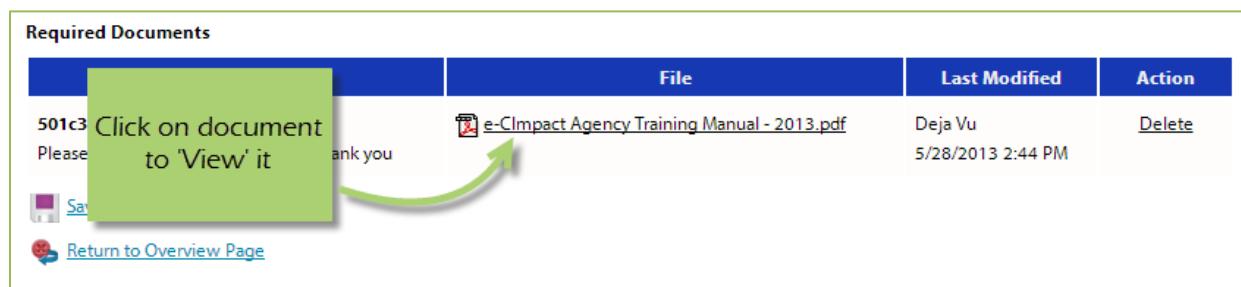


Step 4: 'Save/Upload Attachment(s)'



Viewing Attachments

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



Deleting Attachments

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

Step 1: Open documents form

Application Status		Print / Review Options	
Not Started	In Progress	Submitted	
Item (* indicates Required Item)	Last Up	Action	
Children's Home Foundation			
<u>Agency Information*</u>			
<u>Required Documents</u>			
After School Program		Not Started	<input checked="" type="checkbox"/> Include? 

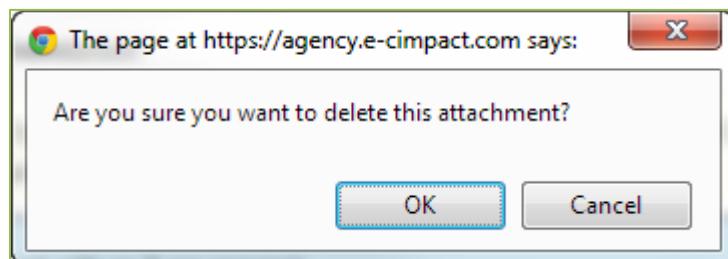
The Attachments form displays the same as other forms.



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	<u>Delete</u>	
 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)	In Progress		
Children's Home Foundation	Open desired form		
Agency Information*		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	 After review - Click here to mark form 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			
Not Started	In Progress	Ready To Submit	Submitted
Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation	5/22/2013 1:55 PM (CST)	Completed / Ready to Submit	
Agency Information*	Deja Vu 5/22/2013 1:55 PM (CST)	Completed / Ready to Submit	
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?
Program Information*	Deja Vu 5/22/2013 2:06 PM (CST)	Completed / Ready to Submit	
Demo Logic Model Navigation*	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	
Agency Information*	Deja Vu 5/22/2013 3:02 PM (CST)	Submitted	
Required Documents	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? 
Program Information*	Deja Vu 5/22/2013 3:02 PM (CST)	Submitted	
Demo Logic Model Navigation*	Deja Vu	Submitted	

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

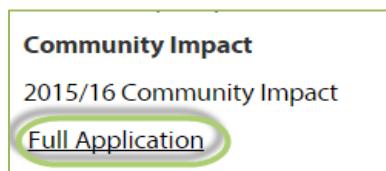
Printing Options

There are different levels you may print:

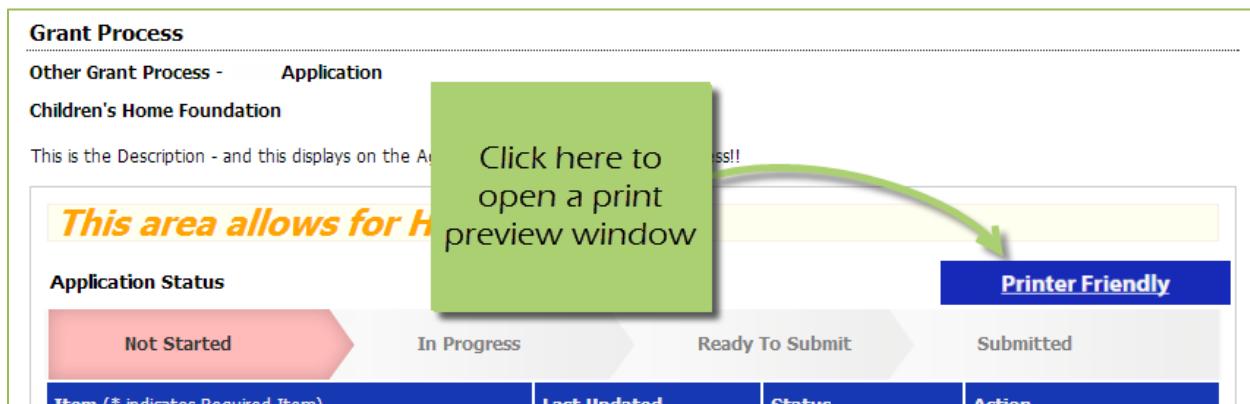
- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet – This will print all forms that are program specific.
- Individual Form – This will print the individual form.

The Entire Application

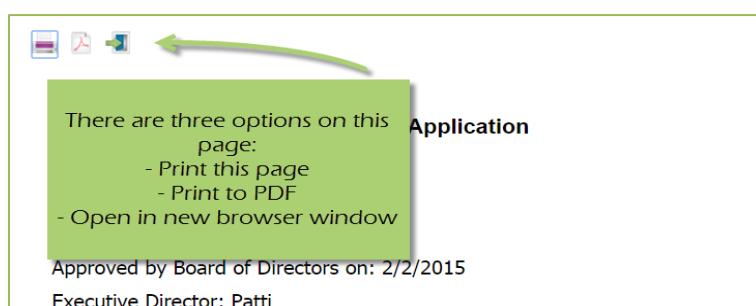
Step 1: Open the application by clicking on it in the left hand navigation.



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

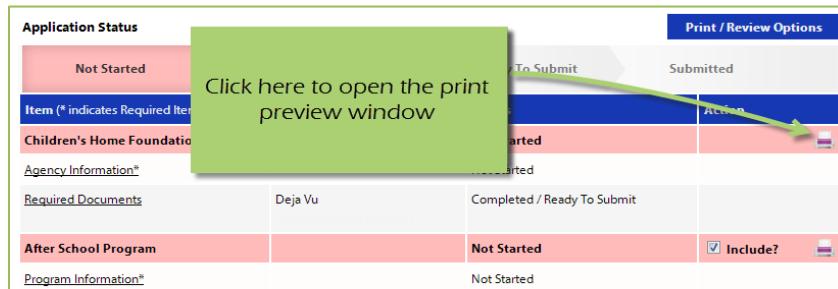


Step 3: Select the option you would like to use, continue on to print.

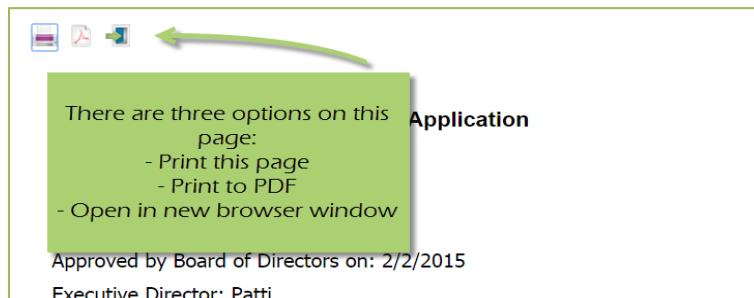


Agency Packet

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



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



Program Packet

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

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

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		Click here to open form 	
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.

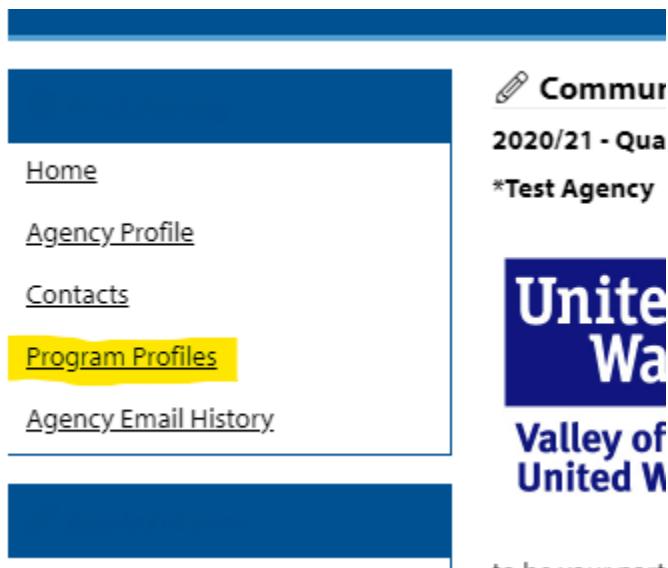
 Save My Work	 Save My Work And Return To Previous Page	 Save My Work and Mark as Complete	 Return To Overview Page	Click here to print the current form 
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Program Information

Adding Program Addresses

Step 1: Log In to Agency site

Step 2: Click on [Program Profiles] link (top left hand of agency site screen)



Step 3: Find the program you would like to update address(es) for and click [Edit]

Program Profiles				
Review the agency programs for accuracy. Check for address, name and primary contact are correct for each program.				
Program Name	Program Primary Contact	Funding Stream	Status	Actions
*Garden Program (test)			Active	Edit
*Test Program - BIC	Test Person		Active	Edit
*Test Program - Housing	Steve Torres	Housing and Homelessness	Active	Edit
*Test Program-Education	Steve Torres	Education	Active	Edit
*Test Program-Health	Steve Torres	Health	Active	Edit

Step 4: Scroll down to the Addresses section.

Program Profiles > *Test Program - BIC

Fields marked with an * are required fields.

Active?

Program Name: *Test Program - BIC

Program Primary Contact: Test Person

Program Type:

Funding Stream:

[Save/Update](#)

[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

Addresses

Main	123 Any Street, Phoenix, AZ 99999	Yes	Edit Delete
Add New Address			

Step 5: To update/edit click *Edit*. Complete updates on following screen. Then click [Save and Return to Previous Page]

Program Profiles > *Test Program - BIC

Fields marked with an * are required fields.

Active?

Program Name: *Test Program - BIC

Program Primary Contact: Test Person

Program Type:

Funding Stream:

[Save/Update](#)

[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

Addresses

Main	123 Any Street, Phoenix, AZ 99999	Yes	Edit Delete
Add New Address			

Step 6: To add an additional Program location click [Add New Address]. Complete address fields on the following screen. Then click [Save and Return to Previous Page]

Program Profiles > *Test Program - BIC

Fields marked with an * are required fields.

Active?

Program Name: *Test Program - BIC

Program Primary Contact: Test Person

Program Type:

Funding Stream:

[Save/Update](#)

[Save and Return to Previous Page](#)

[Cancel and Return to Previous Page](#)

Addresses

Main	123 Any Street, Phoenix, AZ 99999	Yes	Edit Delete
Add New Address			

⌚ Program Profiles > *Test Program - BIC > Addresses > Add New Address

 Fields marked with an * are required fields.

Confidential?
 Primary?

Address Type: *

Address Line 1: *

Address Line 2:

City: *

State: *

Zip Code: *

Description:

Limit up to 255 characters (0 used).

 [Save/Update](#)

 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)