Agency Training Manual

ecimpact@vsuw.org

Table of Contents

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)

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

Please bookmark the address to easily access e-CImpact 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'

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

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 <u>not</u> already have an e-CImpact 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

ℹ️ 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:*   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 ... rd to ensure that you have entered it correctly. Your Password must be between 6 and 15 characters ... aracter from 2 of the groups of alpha, numeric, or special characters. Your Password may not contai ... any white-space.

Password

-- abcdefg ... ers)
-- pa$$wo ... bers)
-- 123456 ... bers)
-- abcdefgh (invalid, contains only letters)
-- abc23 (invalid, less than 6 characters)

Please note what username and password you create.

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

Preferred User Name:*

Password:*

Confirm Password:*

← 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**

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

Next →

🌹 Cancel and Return to Login Page

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)......

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

← **Previous**

Next →

🌹 Cancel and Return to Login Page

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

Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email. 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-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 <u>NOT</u> 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.

Fields marked with an * are required fields.

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

Agency Login

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

For New Organizations:

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

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.

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 procede 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 <u>NOT</u> 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 eCImpact@vsuw.org to reactivate the user account.

Contacts

ℹ️ 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

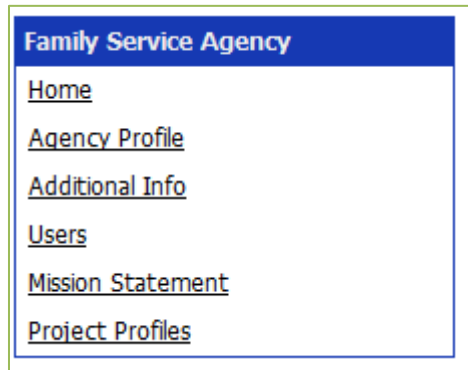Enter any necessary information, and then click 'Save/Update'.

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 is housed. From this section you will be able to update your address(es), or contact information.

Family Service Agency

Home

Agency Profile

Additional Info

Users

Mission Statement

Project Profiles

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.

Agency Profile

ⓘ Fields marked with an * are required fields.

Agency Name:*	123 Test Agency
EIN:	567774568
	Format: '##-#######' or '#########'
Accreditation By:	
Website:	
Staff Liaison:	
Primary Contact:	Alexis Johnson ▾
Description:	

Limit up to 750 characters (0 used).

💾 Save/Update

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'

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

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:*   Program ▾

Address Line 1:*   [　　　　　　　]

Address Line 2:   [　　　　　　　]

City:*   [　　　　　　　]

State:*   Arizona ▾

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

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 recommend 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.

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'

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)
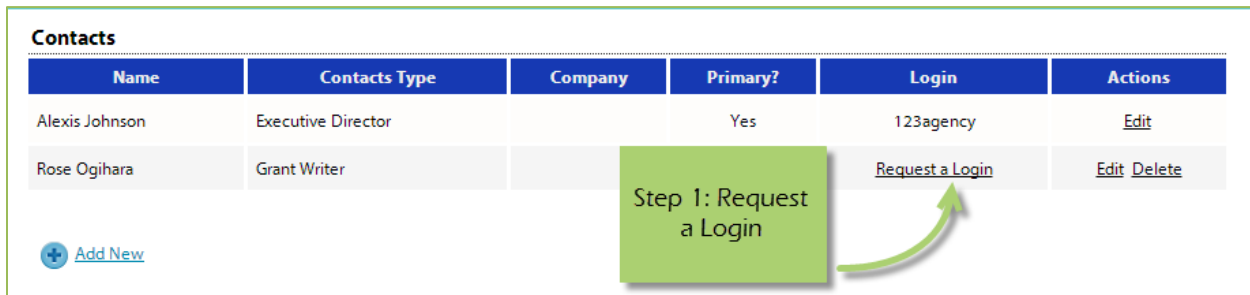
Contact Type: Grant Writer

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 inactivate a program, go to the program profiles area.

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

From here you will be able to update 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.

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

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
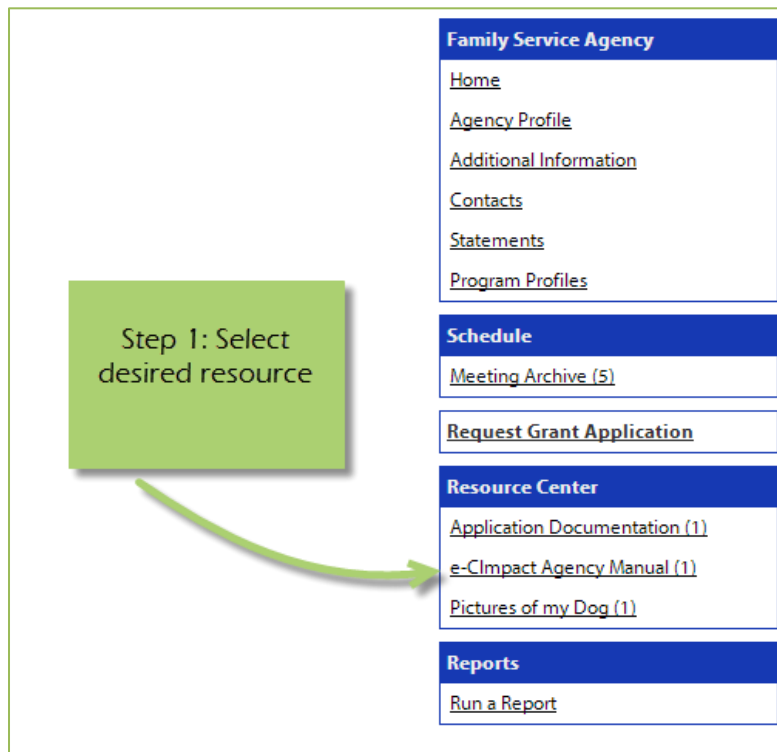
Step 2: Click on the attachment link to open
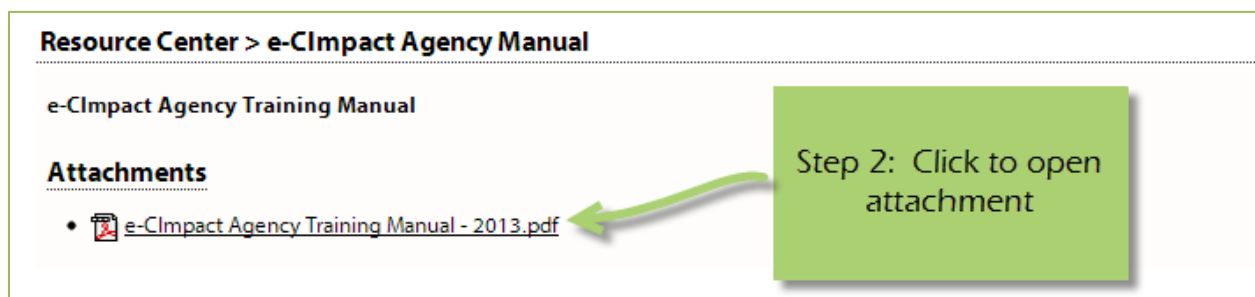
The Basics of your Applications / Grant Process

Accessing Application / Grant Process

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

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

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

Form Status

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

Not Started: When the application or form is in not started status, it means that no data has been entered yet.
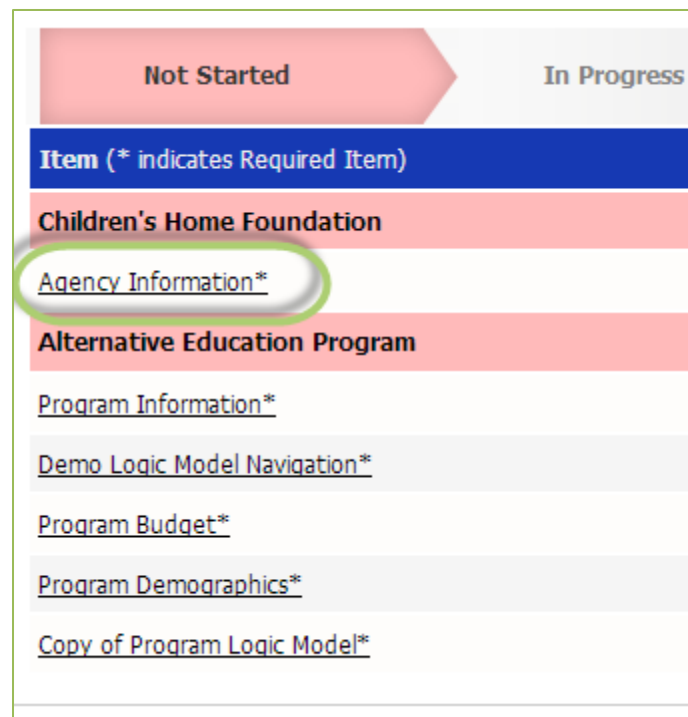
In Progress: If you form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

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 eCImpact@vsuw.org.

Entering Information

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

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
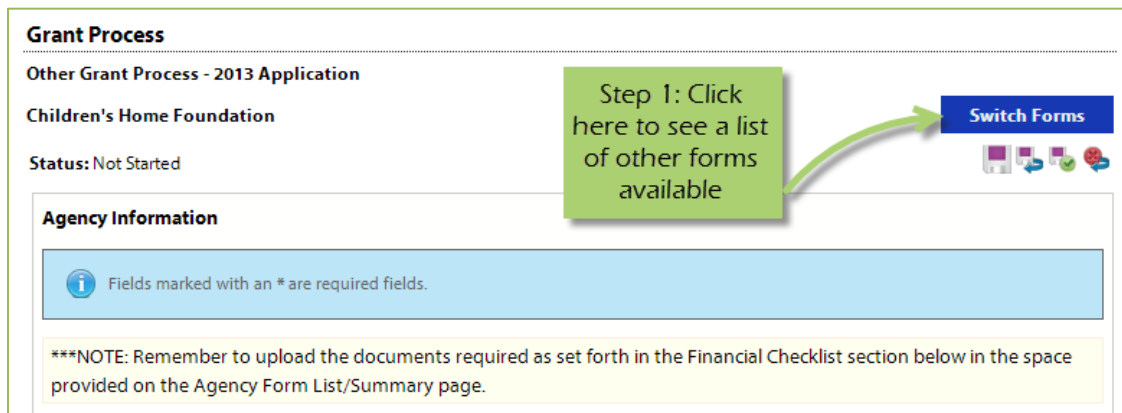
There are two ways to switch forms within an application:

First: When you are finished with one form, click on 'Save My Work and Return to Previous Page', and then select the next form.
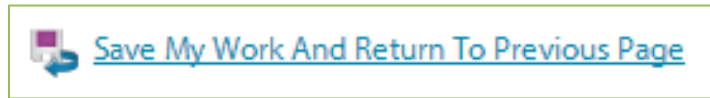
Second: You can use the 'Switch Forms' option, located in the upper right hand corner.

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

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

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

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

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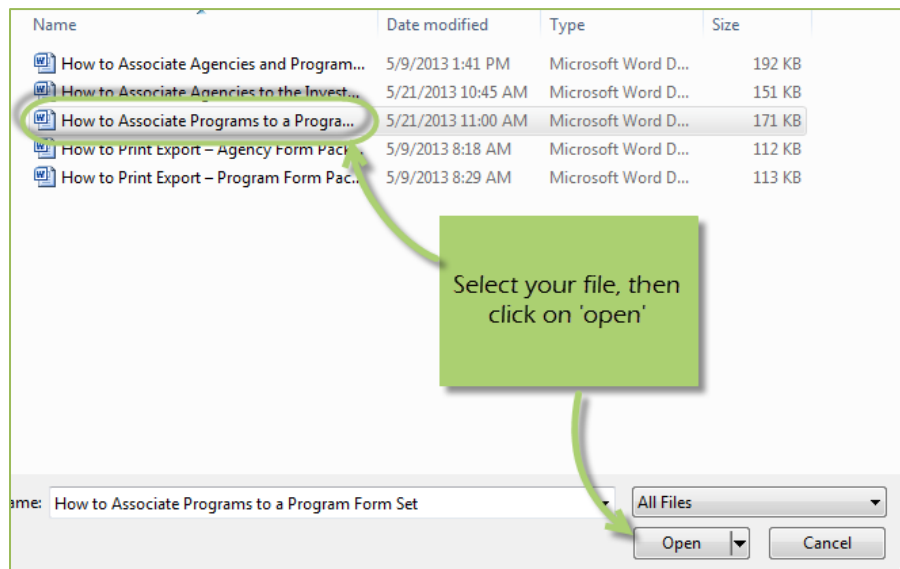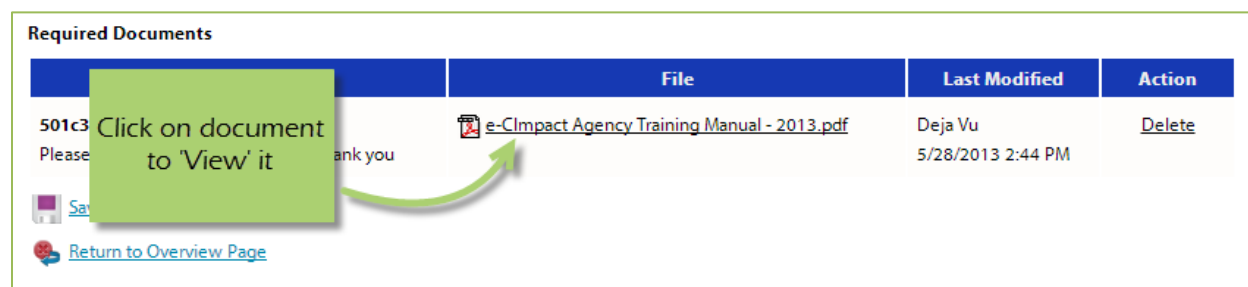

Step 4: 'Save/Upload Attachment(s)'
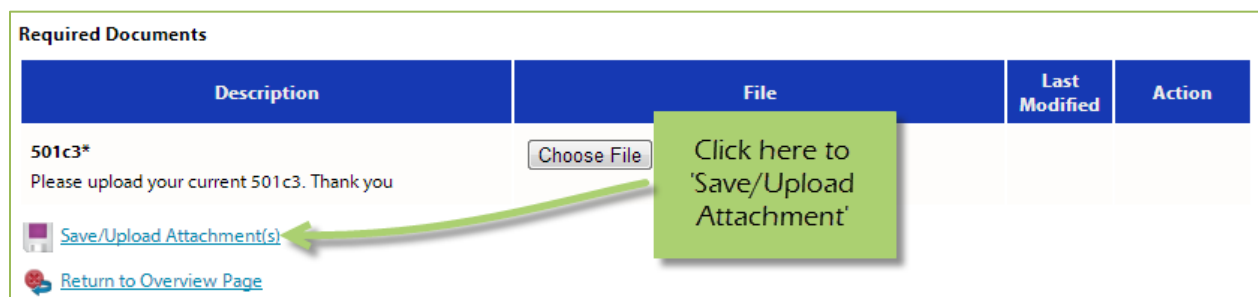
Viewing Attachments

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

Deleting Attachments

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

Step 1: Open documents form

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

Step 3: Confirm you would like to delete this attachment
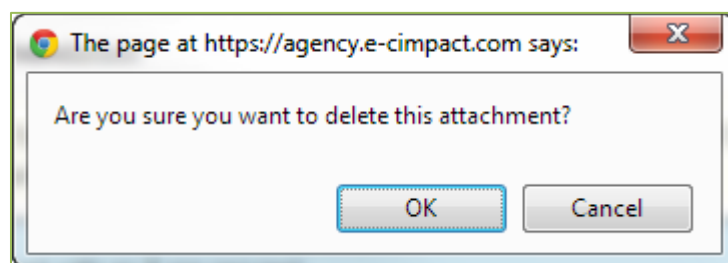
You are now able to upload the correct attachment.

Submitting 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

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

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

Submit!

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

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

Step 2: 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**	☑ 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.
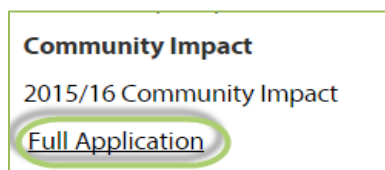
Step 2: Click on 'Print/Review Options' box in the upper right hand corner of the application main page.
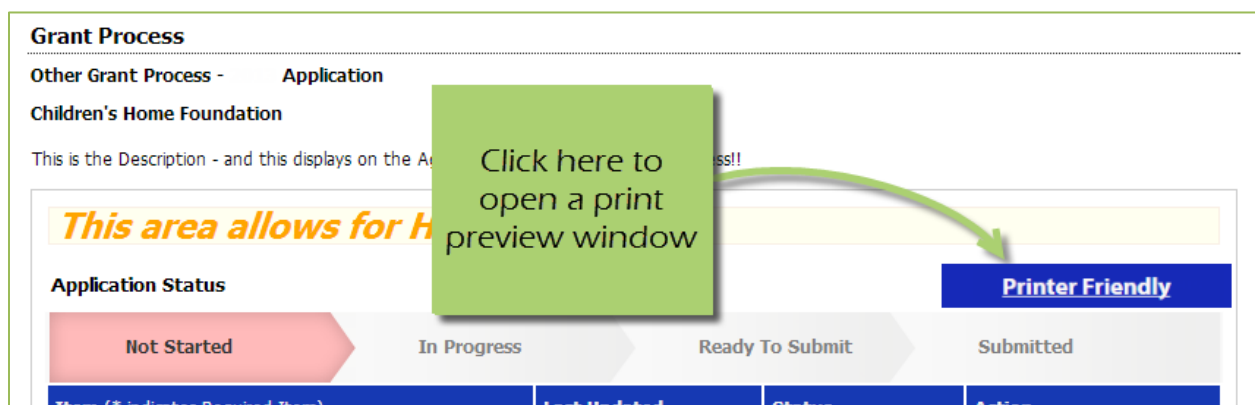
Step 3: Select the option you would like to use, continue on to print.

Agency Packet

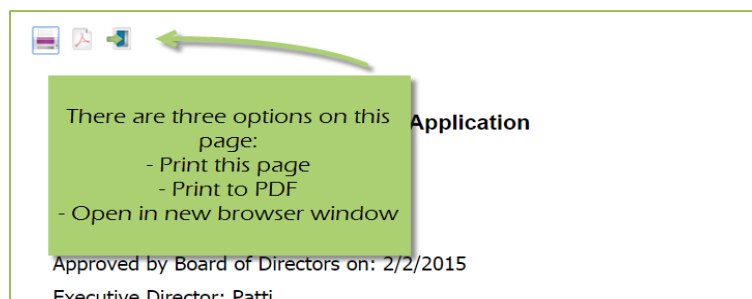**Step 1**: From the application main page, click on the 'Print' icon, in the agency section of the list grid under the action column.
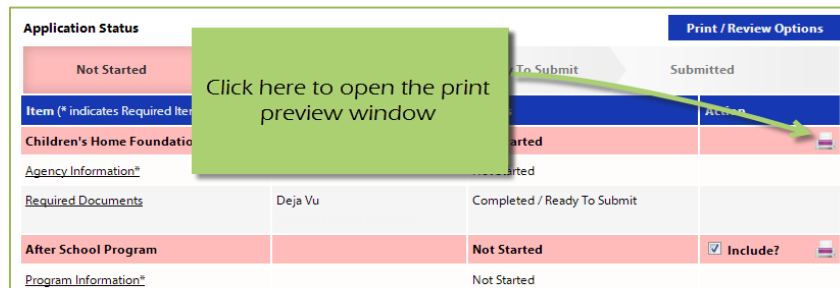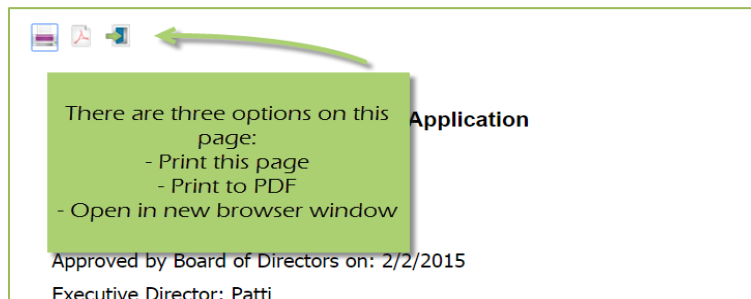

Step 2: Select the 'Print' option you would like to use, continue on to print.

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.

Individual Forms

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

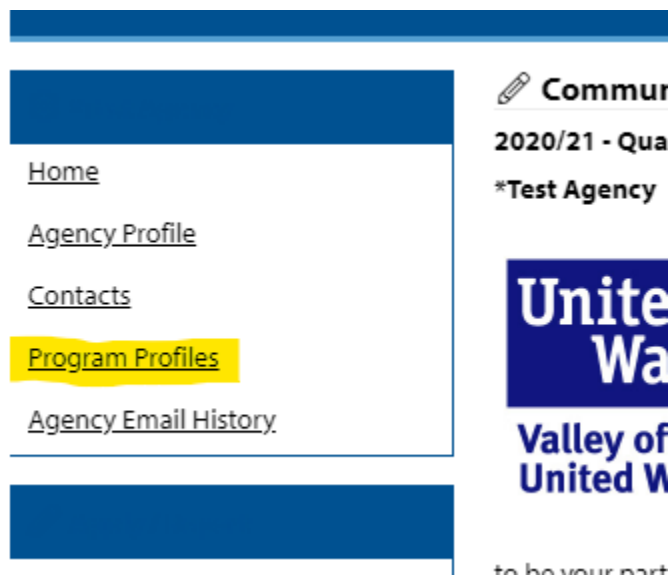**Step 2**: In the lower right hand corner of your form are the option for printing.

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**

ℹ 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**

ℹ 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**

ℹ 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:* [Program ▾]
Address Line 1:* [_____]
Address Line 2:* [_____]
City:* [_____]
State:* [Arizona ▾]
Zip Code:* [_____]
Description: [_____]

Limit up to 255 characters (0 used).

💾 Save/Update
💾 Save and Return to Previous Page
🌸 Cancel and Return to Previous Page