



Valley of the Sun  
**UNITED WAY**



For Support, please contact:

# Agency Training Manual

[ecimpact@vsuw.org](mailto:ecimpact@vsuw.org)



## Table of Contents

Accessing e-CImpact .....	2
Registering a New Agency.....	2
Adding Program(s) to Application .....	7
Common Navigation .....	8
Agency Site Home Page .....	9
Account Management .....	10
Agency Login.....	11
Forgot Password .....	12
Change Password.....	13
User Profile .....	14
Signout.....	15
Agency Information .....	16
Agency Profile.....	16
Account name(s), address(es), phone number(s) and email address(es) .....	17
Agency Contacts .....	20
Updating Program Information.....	23
Calendar .....	24
Resource Center .....	25
Accessing Resources .....	25
The Basics of your Applications / Grant Process .....	26
Accessing Application / Grant Process .....	26
Form Status.....	27
Entering Information.....	28
Save Options.....	28
Switching Forms.....	29

Attachments .....	30
Submitting Application.....	33
Printing Options .....	36
Program Information .....	39

### 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’

**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-CImpact?**

**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-CImpact, 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-CImpact™ 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.*

*\*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:

Unit up to 750 characters (0 used).

Mission Statement:

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 password to ensure that you have entered it correctly. Your Password must be between 6 and 15 characters and contain at least one character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain any white-space.

Password:

-- abcdefghijklmnopqrstuvwxyz (letters)  
-- 0123456789 (numbers)  
-- !@#\$%^&\*()\_+{}~`|'"/> (special characters)  
-- abcdefgh (invalid; contains only letters)  
-- abc23 (invalid; less than 6 characters)

Preferred User Name: \*

Password: \*

Confirm Password: \*

**Please note what username and password you create.**

**Step 3: Enter required information, then click '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.

**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'**

[Cancel and Return to Login Page](#)

**Complete 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:

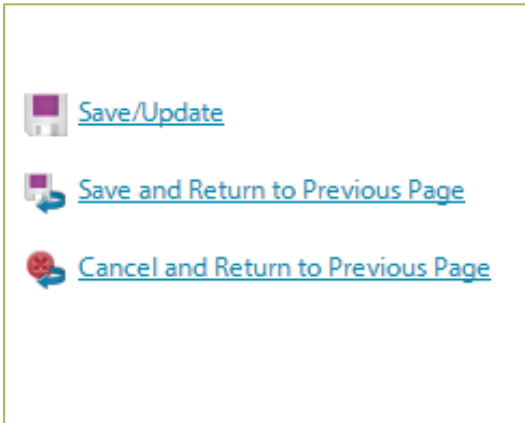
 [Assign Selected Program to the Application](#)

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



## Common Navigation

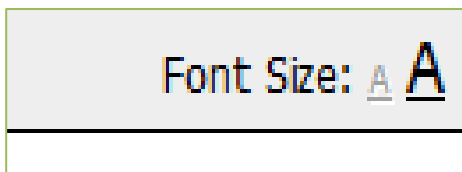
The navigation links in e-Climpact are consistent throughout the site.



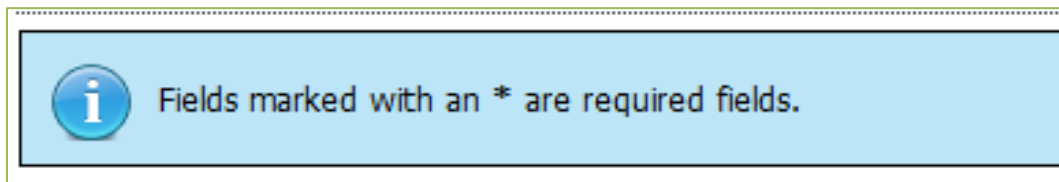
**Save/Update:** Refreshes the page while saving any changes made to your data.

**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.



**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

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



1. Account Management
Community Impact Management

2. Agency Information

**Family Service Agency**  
[Home](#)  
[Agency Profile](#)  
[Additional Info](#)  
[Users](#)  
[Mission Statement](#)  
[Project Profiles](#)

**Schedule**  
[Current Meeting \(1\)](#)  
[Meeting Archive \(1\)](#)  
[On-Site Visits Archive \(1\)](#)

[Request Grant Application](#)

**Resource Center**  
[Agency Reports \(1\)](#)  
[e-Clmpact Agency Training Manual \(1\)](#)

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

**Calendar**  

February 2013						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

**Today's Schedule: Thursday, February 14, 2013**  

- None Scheduled

**Schedule for February**  

- None Scheduled

**Our Work through Initiatives**  
**African American Initiative Update**  
This exciting program supports community-wide efforts to nurture young, at-risk African American boys as they develop into successful young men.  
**Immunization Initiative Update**  
This nationally-recognized program is getting kids in underserved communities the immunizations they need to stay healthy.

3. News, Events, and Calendars

4. Application and Resource Center

FEEDBACK

## 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](mailto:ecimpact@vsuw.org)*

**Step 1:** Enter your username and password

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

The screenshot shows the e-IMPACT Agency Site login page. The header includes the e-IMPACT logo and the text 'Community Impact Management' and 'AGENCY SITE'. The main content area has a 'Sign-In' section 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 fields. A blue link 'Forgot your password?' is located below the button. A green callout box labeled 'Step 1: Enter Username and Password' has an arrow pointing to the 'User Name' field. Another green callout box labeled 'Step 2: Click \'Sign in to our Secure Server\'' has an arrow pointing to the 'Sign in to our Secure Server' button. Below the 'Sign-In' section is a 'New to e-Clmpact?' section with a large green arrow pointing to it. This section contains the text 'Don't have an account?' and 'Create an account to apply for available grants', followed by a green button labeled 'Click here to create a new Account'. The footer includes a 'Secured by Thawte' logo, the text 'Secured by Thawte © 2013 e-Clmpact, Community Impact Management', and a 'POWERED BY seabrooks' logo.

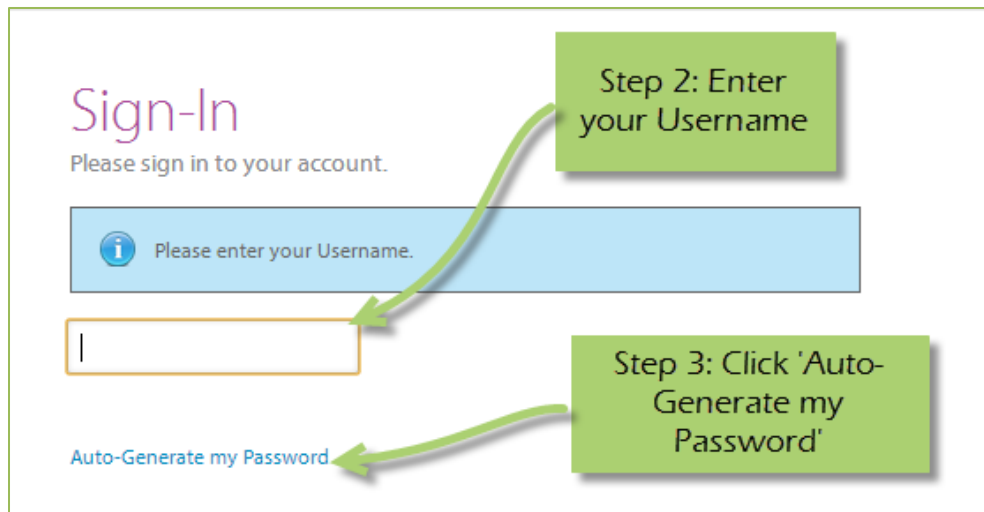
## Forgot Password

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

This close-up screenshot focuses on the 'Sign-In' section of the login page. It shows the 'Sign-In' heading, the instruction 'Please sign in to your account.', and the 'User Name' and 'Password' input fields. Below these fields is a green button labeled 'Sign in to our Secure Server' and a blue link labeled 'Forgot your password?'. A green callout box labeled 'Step 1: Click \'Forgot your Password\'' has an arrow pointing to the 'Forgot your password?' link.

**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](mailto: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 [eCImpact@vsuw.org](mailto:eCImpact@vsuw.org) 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'.

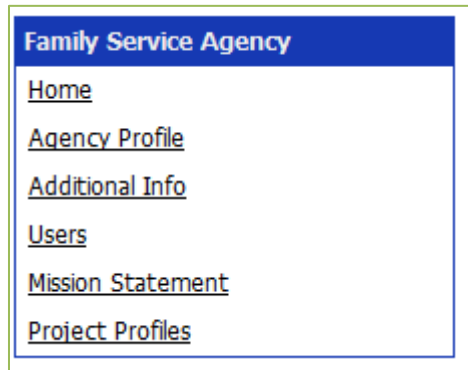
## Signout

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.



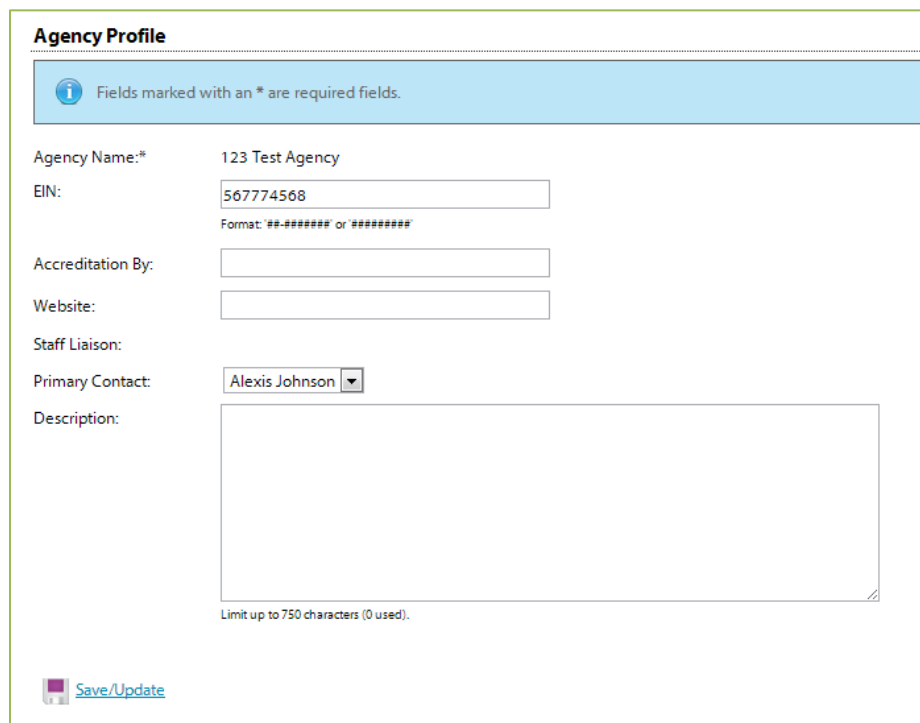
## [Agency Information](#)

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



## [Agency Profile](#)


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

A screenshot of the 'Agency Profile' form. The form has a title 'Agency Profile' at the top. Below the title is a light blue banner with an information icon and the text 'Fields marked with an \* are required fields.' The form contains several fields: 'Agency Name:\*' with the value '123 Test Agency'; 'EIN:' with the value '567774568' and a format hint 'Format: '##-####' or '#####''; 'Accreditation By:'; 'Website:'; 'Staff Liaison:'; 'Primary Contact:' with a dropdown menu showing 'Alexis Johnson'; and 'Description:' with a large text area. At the bottom of the text area is a character count 'Limit up to 750 characters (0 used)'. At the bottom left of the form is a 'Save/Update' button with a small icon.


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

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


**Addresses**

Type	Address	Primary?	Active?	Actions
Mailing	123 Main Street, City, IL 45654, U.S.A.	Yes	Yes	<a href="#">Edit</a> <a href="#">Delete</a>
 <a href="#">Add New Address</a>				

**Phone Numbers**

Type	Phone Number	Primary?	Active?	Actions
Fax	(555) 666-3333	Yes	Yes	<a href="#">Edit</a> <a href="#">Delete</a>
 <a href="#">Add New Phone Number</a>				

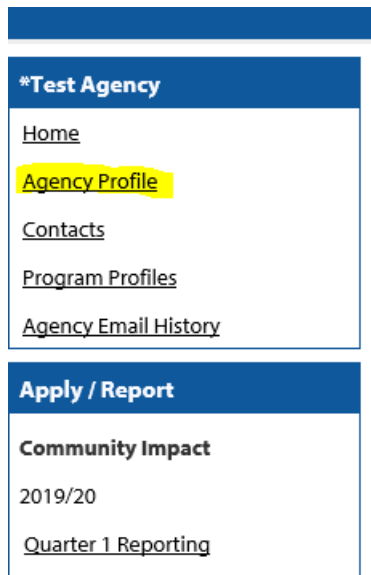
**Email Addresses**

Type	Email Address	Primary?	Active?	Actions
Main	info@email.com	Yes	Yes	<a href="#">Edit</a> <a href="#">Delete</a>
 <a href="#">Add New Email Address</a>				

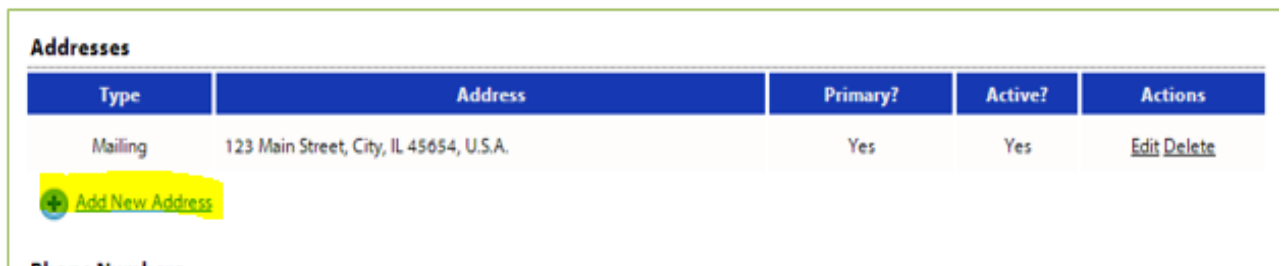
## Additional Program Locations

**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

- ☐ 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 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.

Contacts					
Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Exec		Yes		<a href="#">Edit</a>
<div><div> <a href="#">Add New</a></div><div>Click here to Add New contacts</div><div>Click here to 'Edit' existing contacts</div></div>					

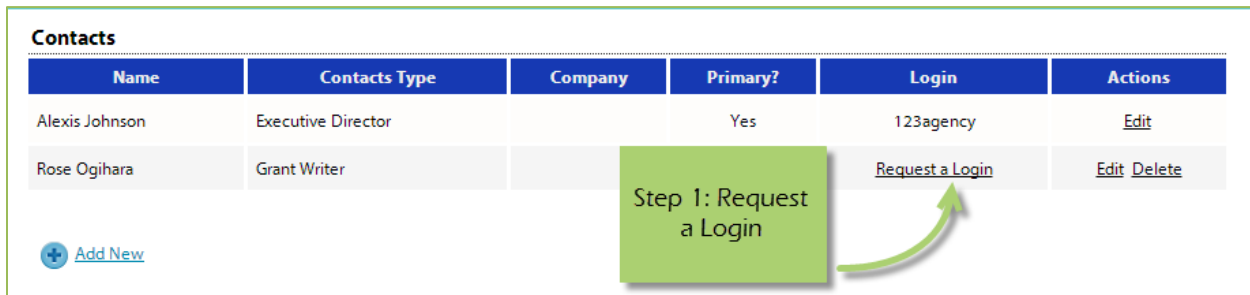
The agency contact profile page is similar to the user profile and contains the same information.

- Name and preference
- Email addresses

- Phone Numbers
- Addresses

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

**Step 1:** Click 'Request a Login'



The screenshot shows a table titled 'Contacts' with the following columns: Name, Contacts Type, Company, Primary?, Login, and Actions. The table contains two rows of data. A green callout box with the text 'Step 1: Request a Login' has an arrow pointing to the 'Request a Login' link in the Actions column of the second row.

Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Executive Director		Yes	123agency	<a href="#">Edit</a>
Rose Ogiara	Grant Writer				<a href="#">Request a Login</a> <a href="#">Edit</a> <a href="#">Delete</a>

[+ 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 inactivate** a program, go to the program profiles area.

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

The screenshot shows a web interface titled "Program Profiles". It contains a table with the following columns: Program Name, Primary Contact, Impact Area, Status, and Actions. The first row of data shows "123 test program", "Alexis Johnson", an empty Impact Area, "Active" status, and an "Edit" link in the Actions column. Below the table, there is a yellow informational box with text: "(These are customizable instructions) The list above displays all programs that you have registered on e-CImpact. If you would like to register another program, please click the link below." Below this box is a blue link with a plus icon: "Click Here to Register a New Program". A green callout box with the text "Step 2: Select 'Edit'" has a green arrow pointing to the "Edit" link in the table's Actions column.

Program Name	Primary Contact	Impact Area	Status	Actions
123 test program	Alexis Johnson		Active	<a href="#">Edit</a>

(These are customizable instructions) The list above displays all programs that you have registered on e-CImpact. If you would like to register another program, please click the link below.

[Click Here to Register a New Program](#)

Step 2: Select 'Edit'

From here you will be able to update **or inactivate** information needed.



## Calendar

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

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

### Calendar

≤	May 2013						≥
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
28	29	30	1	2	3	4	
5	6	7	8	9	10	11	
12	13	14	15	16	17	18	
19	20	21	22	23	24	25	
26	27	28	29	30	31	1	
2	3	4	5	6	7	8	

**Today's Schedule: Tuesday, May 21, 2013**

- None Scheduled

**Schedule for May**

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

[2013 Community Impact Application](#)

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

### Calendar

≤	April 2013						≥
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
31	1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	1	2	3	4	
5	6	7	8	9	10	11	

**Today's Schedule: Tuesday, May 21, 2013**

- None Scheduled

**Schedule for April**

- None Scheduled

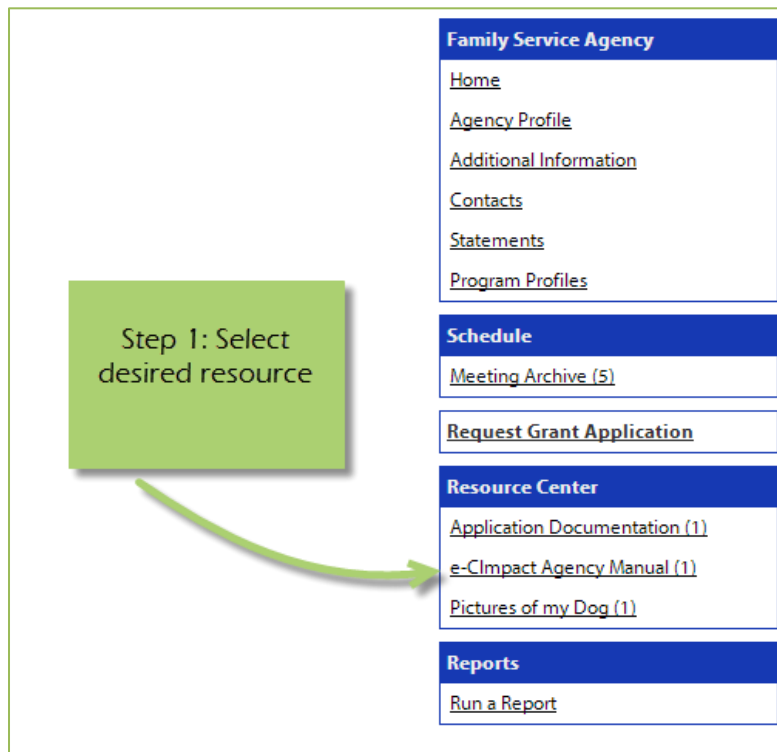
Use the arrows to switch months

## Resource Center

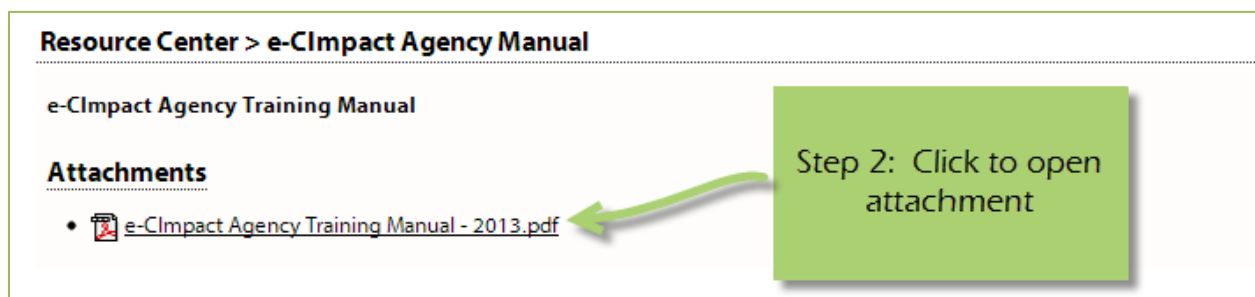
The agency resource center is where you will be able to find any documents you may need to reference from Valley of the Sn United Way. The resource center is located in the lower half of the left hand navigation.

### 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.



## 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 web interface for tracking application status. At the top, a progress bar has four segments: 'Not Started' (highlighted in red), 'In Progress' (grey), 'Ready To Submit' (grey), and 'Submitted' (grey). Below this is a table with four columns: 'Item (\* indicates Required Item)', 'Last Updated', 'Status', and 'Action'. The table lists several items, all with a 'Not Started' status. A green callout box with two arrows points to the 'Not Started' segment of 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.

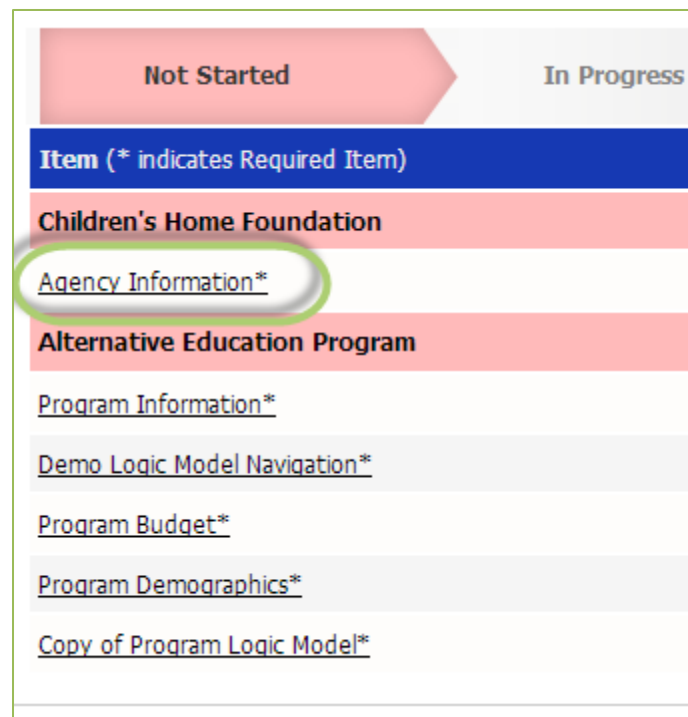
**In Progress:** If your form is set to in progress, then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

**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 your [eImpact@vsuw.org](mailto:eImpact@vsuw.org).

## Entering Information

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

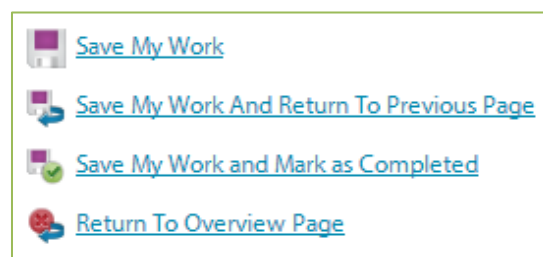


The screenshot shows a web interface for entering information. At the top, there are two tabs: "Not Started" (highlighted in red) and "In Progress". Below the tabs is a table with a blue header row labeled "Item (\* indicates Required Item)". The table contains several rows, each with a red header and a white body. The first row is "Children's Home Foundation". The second row is "Agency Information\*", which is circled in green. 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\*".





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 link. The first option is "Save My Work" with a floppy disk icon. The second option is "Save My Work And Return To Previous Page" with a floppy disk and back arrow icon. The third option is "Save My Work and Mark as Completed" with a floppy disk and checkmark icon. The fourth option is "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](#)

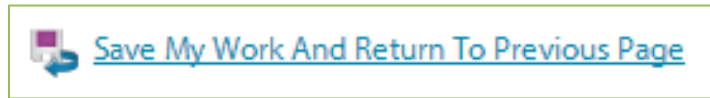
**Save My Work / Save My Work and Return to Previous Page:** These options are for when you need to save, or move on to something else, and are not finished entering information.

**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

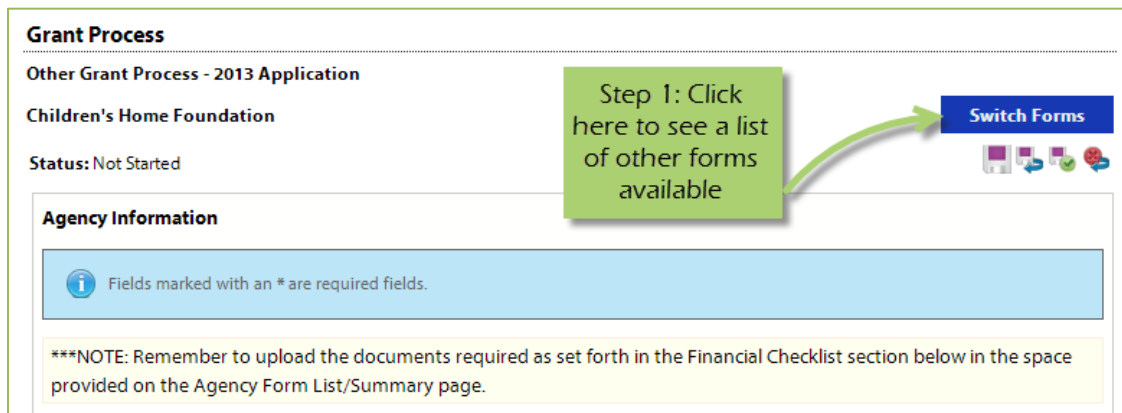
There are two ways to switch forms within an application:

**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.



**Grant Process**

Other Grant Process - 2013 Application

Children's Home Foundation

Status: Not Started

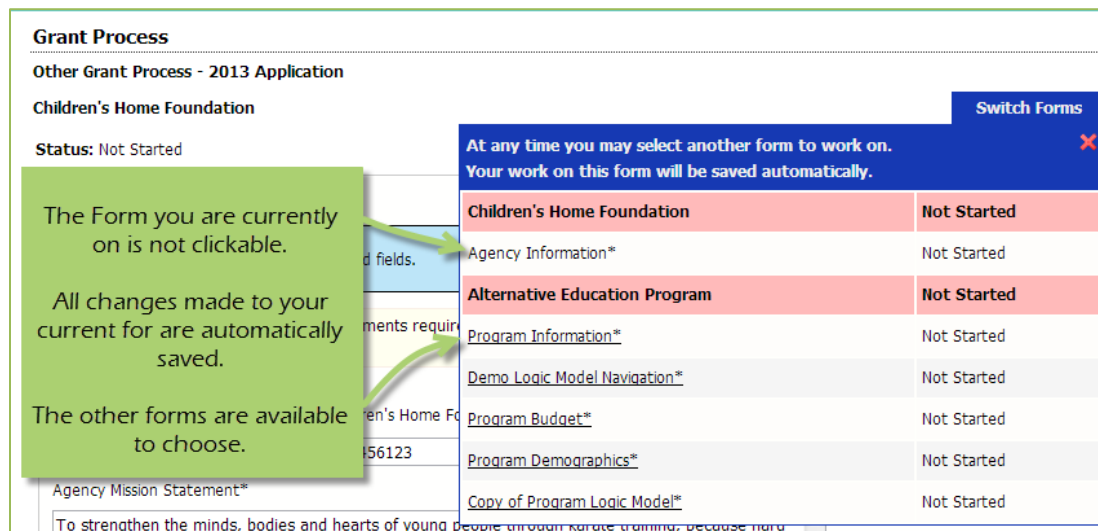
**Agency Information**

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.

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.

Form Name	Status
Children's Home Foundation	Not Started
Agency Information*	Not Started
Alternative Education Program	Not Started
Program Information*	Not Started
Demo Logic Model Navigation*	Not Started
Program Budget*	Not Started
Program Demographics*	Not Started
Copy of Program Logic Model*	Not Started

## Attachments

### Uploading Attachments

Excepted file types for uploading documents:

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

#### Step 1: Open documents form

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

The Attachments form displays the same as other forms.

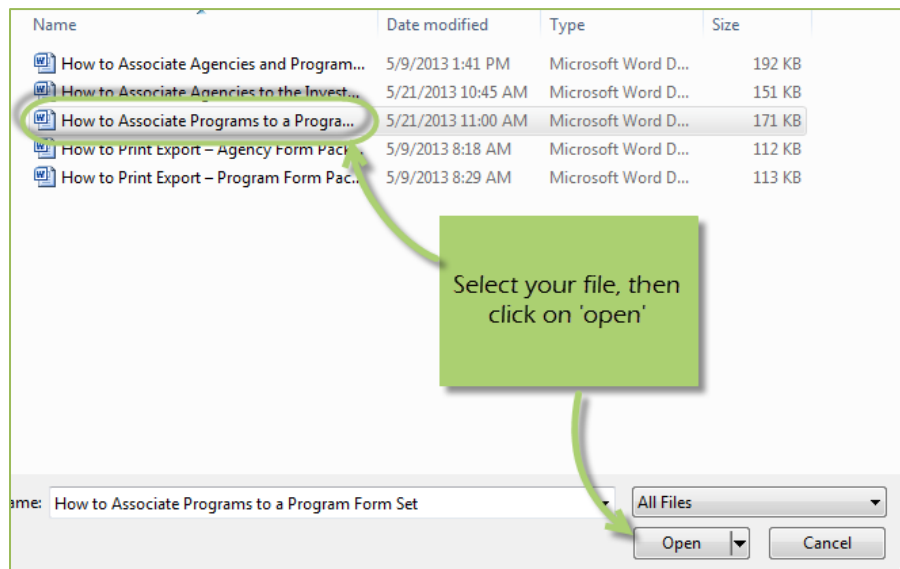
**Step 2:** Once you have confirmed your document meets the upload requirements, click 'Choose File'.

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

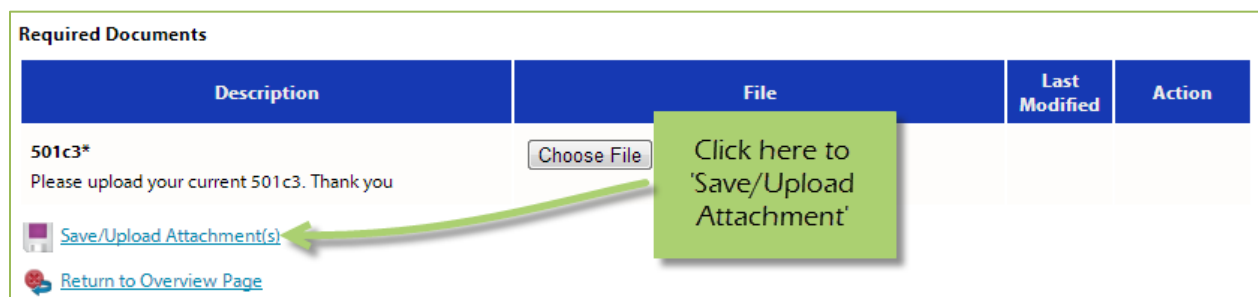
[Save/Upload Attachment\(s\)](#)  
[Return to Overview Page](#)

Click here to 'Choose File'

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

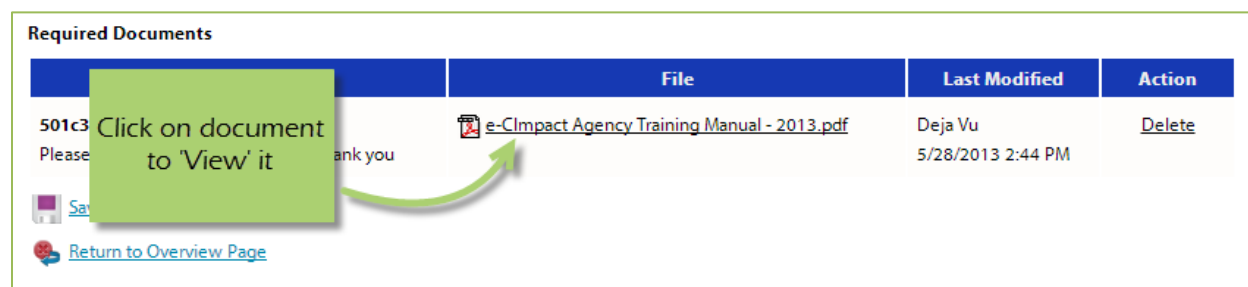


**Step 4:** 'Save/Upload Attachment(s)'



## 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		
<a href="#">Agency Information*</a>		
<a href="#">Required Documents</a>		
After School Program	Not Started	<input checked="" type="checkbox"/> Include?

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

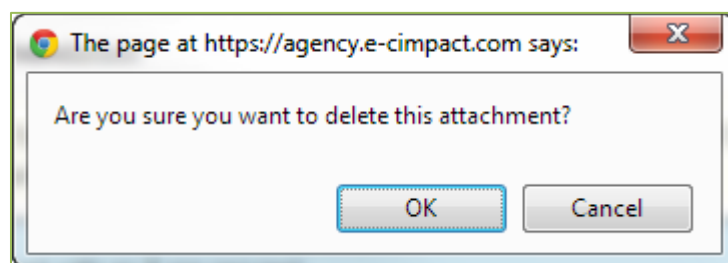
**Required Documents**

Description	F	Last Modified	Action
<b>501c3*</b> Please upload your current 501c3. Thank you	e-CImpact Agency Train	Deja Vu 5/28/2013 2:44 PM	<a href="#">Delete</a>

[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)	Item ID	Status	Action
Children's Home Foundation	5	In Progress	
Agency Information*	D 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
<b>Children's Home Foundation</b>	<b>5/22/2013 1:55 PM (CST)</b>	<b>Completed / Ready to Submit</b>	
<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	
<b>After School Program</b>	<b>5/22/2013 2:08 PM (CST)</b>	<b>Completed / Ready to Submit</b>	<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	

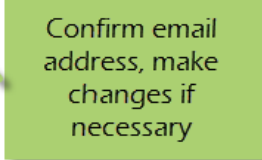
**Step 1:** Confirm the email address to send the confirmation message.

**Application Submission Details**

Send Submission Confirmation Email To:\*

Submitted By:

**Submit This Application Now!**

 Confirm email address, make changes if necessary

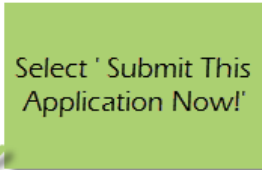
**Step 2:** Select 'Submit This Application Now!'

**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
<b>Children's Home Foundation</b>	<b>5/22/2013 3:02 PM (CST)</b>	<b>Submitted</b>	
<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	
<b>After School Program</b>	<b>5/22/2013 3:02 PM (CST)</b>	<b>Submitted</b>	<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.

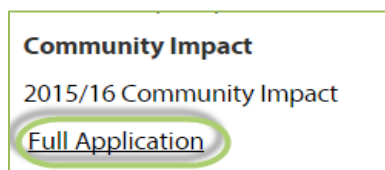
## Printing Options

There are different levels you may print:

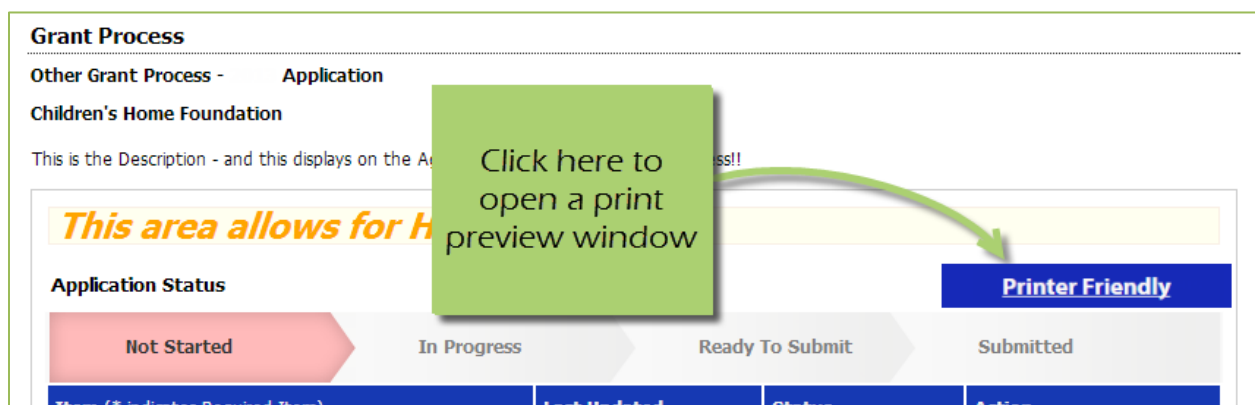
- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet– This will print all forms that are program specific.
- Individual Form – This will print the individual form.

### The Entire Application

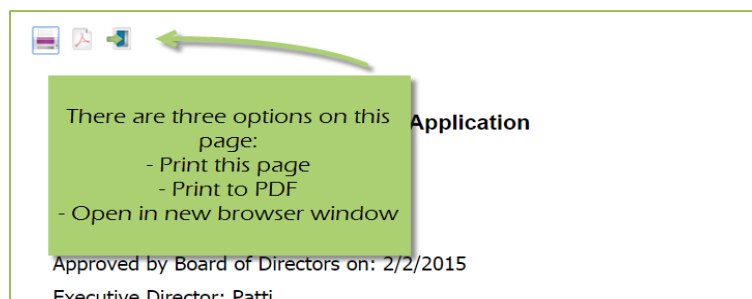
**Step 1:** Open the application by clicking on it in the left hand navigation.



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

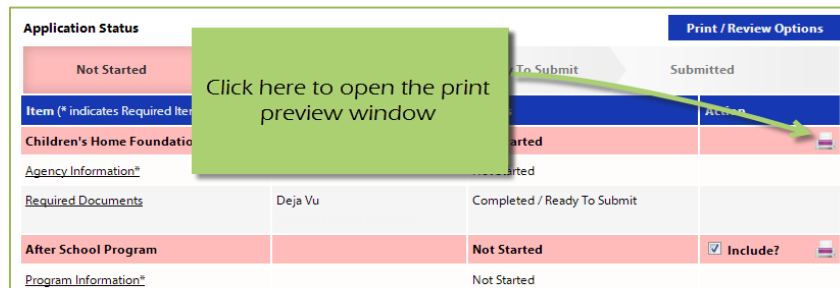


**Step 3:** Select the option you would like to use, continue on to print.

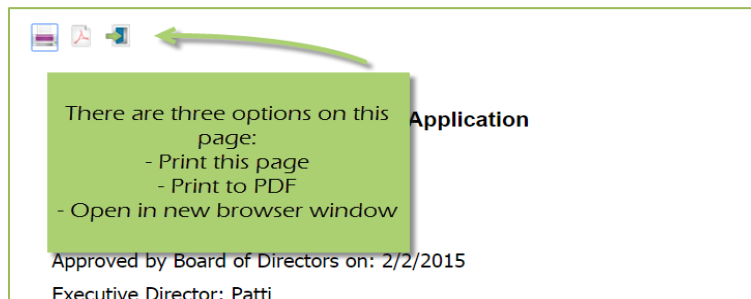


## Agency Packet

**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	

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.

The screenshot shows the 'Application Status' page with a progress bar at the top indicating stages: Not Started, In Progress, Ready To Submit, and Submitted. Below the progress bar is a table with columns: Item (\* indicates Required Item), Last Updated, and Action. A green callout box with the text 'Click here to open form' points to the 'Children's Home Foundation' row. The table also includes links for 'Agency Information\*', 'Required Documents', and 'Program Information\*'. The 'After School Program' row shows a status of 'Not Started' and an 'Include?' checkbox.

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.

The screenshot shows the lower right corner of a form with four navigation links: 'Save My Work', 'Save My Work And Return To Previous', 'Save My Work and Mark as Completed', and 'Return To Overview Page'. A green callout box with the text 'Click here to print the current form' points to the 'Printer Friendly' link, which is accompanied by a printer icon.

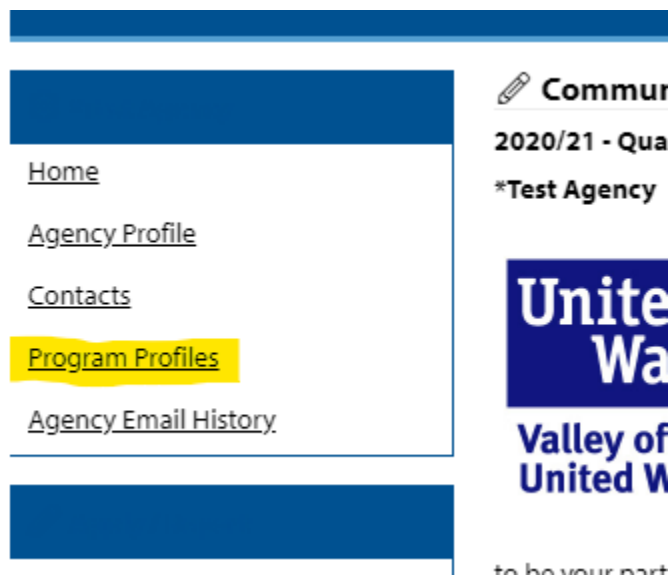
[Printer Friendly](#)

## 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	<a href="#">Edit</a>
*Test Program - BIC	Test Person		Active	<a href="#">Edit</a>
*Test Program - Housing	Steve Torres	Housing and Homelessness	Active	<a href="#">Edit</a>
*Test Program-Education	Steve Torres	Education	Active	<a href="#">Edit</a>
*Test Program-Health	Steve Torres	Health	Active	<a href="#">Edit</a>

### 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:   
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	<a href="#">Edit</a> <a href="#">Delete</a>

 [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	<a href="#">Edit</a> <a href="#">Delete</a>
------	-----------------------------------	-----	---

[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	<a href="#">Edit</a> <a href="#">Delete</a>
------	-----------------------------------	-----	---

[Add New Address](#)

⚙️ **Program Profiles > \*Test Program - BIC > Addresses > Add New Address**

 Fields marked with an \* are required fields.

	<input type="checkbox"/> Confidential?
	<input type="checkbox"/> Primary?
Address Type:*	<div>Program ▾</div>
Address Line 1:*	<input type="text"/>
Address Line 2:*	<input type="text"/>
City:*	<input type="text"/>
State:*	<div>Arizona ▾</div>
Zip Code:*	<input type="text"/>
Description:	<div><div></div></div>

Limit up to 255 characters (0 used).

 [Save/Update](#)

 [Save and Return to Previous Page](#)

 [Cancel and Return to Previous Page](#)