



United Way
of Southeastern Idaho

2021-2022

Agency Training Manual

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e-Clmpact Platform brought
to you by:



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Accessing e-CImpact

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

Direct access to the agency site is: <https://agency.e-cimpact.com/login.aspx?org=14100F>

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

Agency Login

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

For New Organizations:

Currently, the default agency username is the email address of the agency's **primary contact**.

The first time you login, the password will be pwd123. Once logged in you will be automatically prompted to change your password.

For Others: *if you do not know or remember your username and password, please contact Molly Olson at molly@unitedwaysei.org or 208-232-1389.*

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 login interface for the United Way of Southeastern Idaho. On the left is the e-IMPACT logo with the tagline 'Community Impact Management' and 'AGENCY SITE'. The main content area is titled 'UNITED WAY OF SOUTHEASTERN IDAHO Sign-In' and includes the instruction 'Please sign in to your account.' Below this are two input fields: 'User Name' and 'Password'. A green button labeled 'Sign in to our Secure Server' is positioned below the password field, with a blue link 'Forgot your password?' underneath. A second green button, 'Click here to create a new e-CImpact account', is located in a separate section below the login area. Two orange callout boxes with arrows provide instructions: 'Step 1: Enter Username and Password' points to the input fields, and 'Step 2: Click 'Sign in to our Secure Server'' points to the green button.

Registering a New Agency

If you are not yet an Partner Agency, please proceed with site registration. Registration is required for all non-partner agencies.

Step 1: From the agency login page select 'Click here to create a new Account.'

The screenshot shows the e-IMPACT sign-in page. On the left is the e-IMPACT logo with the text 'Community Impact Management' and 'AGENCY SITE'. On the right, under the heading 'UNITED WAY OF SOUTHEASTERN IDAHO', is a 'Sign-In' section with fields for 'User Name' and 'Password', a 'Sign in to our Secure Server' button, and a 'Forgot your password?' link. Below the sign-in section is a 'New to e-IMPACT?' section with a 'Create an e-IMPACT account' link and a 'Click here to create a new e-IMPACT account' button. An orange callout box on the right points to the button with the text '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.

United Way of Southeastern Idaho Agency Registration

The screenshot shows the 'United Way of Southeastern Idaho Agency Registration' form. At the top, a blue box contains an information icon and the text 'Fields marked with an * are required fields.' Below this is a yellow box with the instruction 'Please complete the requested information below then click the 'Next' button in the bottom right corner of this page.' The form section is titled 'Agency Account Information' and contains a field for 'EIN:*' with a text input box. A green 'Next' button is located at the bottom right of the form. At the bottom left, there is a link with a red 'X' icon that says 'Cancel and Return to Login Page'.

**EIN – the system will automatically validate your EIN, confirming you do not already have an e-IMPACT account. The system will also automatically enter any information linked to the EIN entered.*

Step 3: Please enter all required information regarding your agency. Then proceed to the next page. Please note what username and password you create for your account.

Step 4: Select a grant application you would like to apply for, and then continue to the next page.

The screenshot shows the Project Inc. website interface. On the left is a navigation menu with categories: PROJECT INC (Home, Agency Profile, Agency Custom Fields, Contacts, Mission Statement, Program Profiles, Agency Email History), Apply / Report (Request LOI), and Resource Center (Training Resources (1)). The 'Request LOI' link is highlighted with an orange arrow. In the center is a calendar for October 2019, with the 29th selected. To the right, there is a 'Today's Schedule' section for Tuesday, October 29, 2019, showing 'None Scheduled' for both the day and the month of October. Below this is a section for 'United Way of Southeastern Idaho Agency News' and 'Agency Grants Funding Timeline'. A table lists grant stages: Letter of Intent, Full Application, and Reporting, with 'Open Date' and 'Due Date' columns. The 'Request LOI' button is overlaid on the 'Letter of Intent' row. Below the table, contact information for Molly Olson is provided, including phone and email, and a website link for more information.

	Open Date	Due Date
Letter of Intent		TBD
Full Application		TBD
Reporting		TBD

Step 4:
Request LOI

Questions?
Name: Molly Olson
Phone: (208) 232-1389
Email: molly@unitedwaysei.org
For more information visit our website at: <https://www.unitedwaysei.org>

Step 5: Please answer all qualification questions and proceed to the next page. If your agency passes the initial qualification questions, you will then move on to confirm your registration. In the event your agency does not qualify, you will be provided information on who to contact should you have any questions.

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

Review and Complete Registration

Review and submit your request. Review the information below, then click 'Complete Registration.'

Request For Participation **Letter of Intent**

In:

Applications will be reviewed by allocations panels consisting of volunteers. The panel chairs will make a recommendation on how funds will be distributed. Final allocations are reviewed any approved by United Way of Southeastern Idaho.

Agency Qualification Form

Is your Organization in compliance with all Federal, State and local laws regarding non-discrimination on the basis of age, sex, creed, race or disability in your programs, services, staffing and volunteer areas?

Yes

Has your organization maintained a valid IRS 501 c 3 status for the past two years or more? Yes

To the best of your knowledge, has there been any known fraud or misappropriation of organizational assets committed by any in the past 2 years?

No

Does your Organization have written internal financial controls? Yes

Step 6: Review and click 'Submit Registration'

Previous

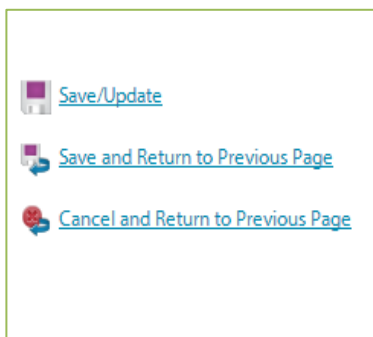
Complete Registration

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

To access the rest of the e-CImpact Agency Training Manual please go to the Resource Center located in the lower left side of the agency homepage.

Common Navigation


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



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

Save and Return to Previous Page: Returns you to the page last visited while saving any changes made to your data.

Cancel and Return to Previous Page: Will return you to the previous page and will NOT save any changes made to your data.



Font Size: A A

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)

[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 Molly Olson to reactivate the user account.

Contacts

Fields marked with an * are required fields.

Primary?
 Include in all Emails?
 Active?

Type:*

Prefix:

First Name:*

Middle Initial:

Last Name:*

Suffix:

Company:

Job Title:

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

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

Signout

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

Agency Information

**Test Agency
Home
Agency Profile
Agency Custom Fields
Contacts
Mission Statement
Program Profiles
Agency Email History

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.

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.

Account Names

Type	Account Name	Active?	Actions
+ Add New Account Name			

Addresses

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

Phone Numbers

Type	Phone Number	Primary?	Active?	Actions
Fax	(555) 666-3333	Yes	Yes	Edit Delete
+ Add New Phone Number				

Email Addresses

Type	Email Address	Primary?	Active?	Actions
Main	info@email.com	Yes	Yes	Edit Delete
+ Add New Email Address				

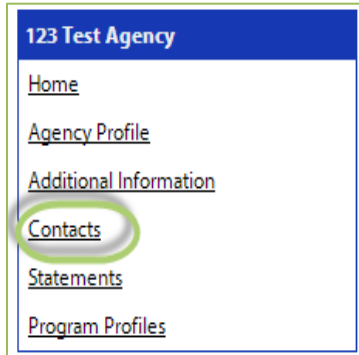
'Account Names' is a place for any other names for your agency, or if your agency name is abbreviated you may place the legal name here.

Agency Contacts

Confidential?
 Primary?
 Active?

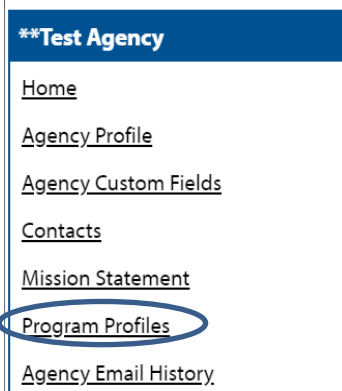
When adding a new record, or updating existing records, be sure to select 'Active' appropriately.

'Primary' can only be selected for one record.



To view all agency contacts – click ‘Contacts’ from the agency information section on the homepage.

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.

The Basics of your Applications / Grant Process

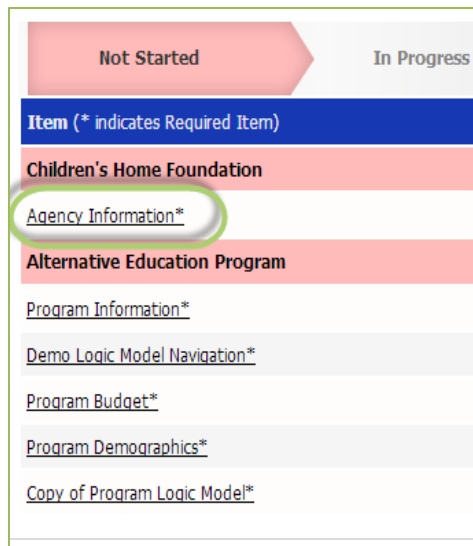
Accessing the Application / Grant Process

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



Entering Information

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

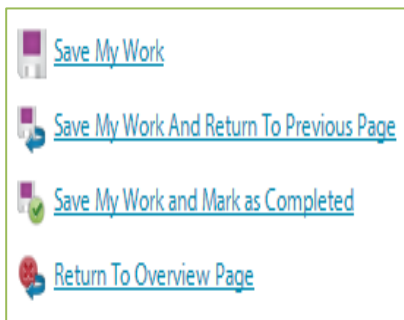


The screenshot shows a web interface with two tabs: 'Not Started' (active) and 'In Progress'. Below the tabs is a table with the following items:

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.

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.

Community Investment
 FY 2020-2021 - Application
 **Test Agency
 Status: ● Not Started

[Switch Forms](#)

Organization Information

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

Form Status

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

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

Not Started In Progress Ready To Submit Submitted			
Item (* indicates Required Item)	Last Updated	Status	Options
**Test Agency	10/22/2019 2:42 PM (CST)	Completed / Ready to Submit	
Organization Information*		● Not Started	
Organization Budget*	Wonder Woman	● Completed / Ready to Submit	
**Test Program		● In Progress	<input checked="" type="checkbox"/> Include?
Program Budget*		● In Progress	
Additional Funding Sources*		● Completed / Ready to Submit	
Leveraged Funding Sources*		● Not Started	
Client Characteristics*	wonder woman 10/18/2019 3:46 PM (CST)	● Completed / Ready to Submit	

The top bar is the overall application status.

The status column is for 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 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 Molly Olson.

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.

Step 3: Once all forms are ‘Completed / Ready to Submit’, the ‘Submit This Application Now!’ option will appear at the top of the page.

Step 4: Confirm the email address to send the confirmation message.


Step 5: Select ‘Submit This Application Now!’

 Your Application is now Ready To Submit! Please verify all the information ...

Application Submission Details



Send Submission Confirmation Email To:*

Submitted By:

Submit This Application Now! 

Application Status Print / Review Options

Not 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	
<u>Agency Information*</u>	Deja Vu 5/22/2013 1:55 PM (CST)	Completed / Ready to Submit	
<u>Required Documents</u>	Deja Vu 5/22/2013 1:55 PM (CST)	Completed / Ready To Submit	
After School Program	5/22/2013 2:08 PM (CST)	Completed / Ready to Submit	<input checked="" type="checkbox"/> Include? 
<u>Program Information*</u>	Deja Vu 5/22/2013 2:06 PM (CST)	Completed / Ready to Submit	
<u>Demo Logic Model Navigation*</u>	Deja Vu 5/22/2013 2:07 PM (CST)	Completed / Ready to Submit	


Now that you have successfully submitted your application, you will see everything is now in submitted status. You have the option to view and print the submitted application.

Grant Process

Other Grant Process - 2013 Application

Children's Home Foundation

This is the Description - and this displays on the Agency Site in the Investment Process!!

 Thank you... application will be review... indicate... funding to be ...



Application Submission Details

Send Submission Confirmation Email To:* doreen@seabrooks.com

Submitted By: Deja Vu on 5/22/2013 at 3:02 PM (CST)

Application Status [Print / Review Options](#)

Not Started
In Progress
Ready To Submit
Submitted

Item (* indicates Required Item)	Last Updated	Status	Action
Children's Home Foundation	5/22/2013 3:02 PM (CST)	Submitted	
<u>Agency Information*</u>	Deja Vu 5/22/2013 3:02 PM (CST)	Submitted	
<u>Required Documents</u>	Deja Vu 5/22/2013 1:55 PM (CST)	Submitted	
After School Program	5/22/2013 3:02 PM (CST)	Submitted	<input checked="" type="checkbox"/> Include? 
<u>Program Information*</u>	Deja Vu 5/22/2013 3:02 PM (CST)	Submitted	
<u>Demo Logic Model Navigation*</u>	Deja Vu	Submitted	

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.

