Agency Site Manual

United Way of Graham and Greenlee Counties

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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=03056F](https://agency.e-cimpact.com/login.aspx?org=03056F)

Please bookmark the address to easily access e-CImpact at your convenience. In the event you land on the generic agency login page that requests an Org Code, please enter **03056F**.

Please note that your specific site may differ slightly from example images depending on which features your United Way is using or potential site updates.
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 use the ‘Forgot Your Password?’ link on the login page or contact Eva Jazwinski.

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 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 Eva Jazwinski.
Registering a New Agency

If you are not yet an United Way of Graham and Greenlee Counties Partner Agency, please proceed with site registration. Registration is required for all non-partner agencies.

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

[Image of the e-IMPACT website login page]

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

[Image of the e-IMPACT website registration page]
**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.*
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 the 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....

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

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

If your agency passes the initial qualification questions, you will then move on to confirm your registration. In the event your agency does not qualify, you will be provided information on who to contact should you have any questions.

Agency Qualification Form
Customizable instructions can be entered here.

Section 1
Does your organization have a 501c3 rating? (answer 'Yes' to Qualify)......

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

**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

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 Eva Jazwinski to reactivate the user account.
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.
Agency address(es), phone number(s) and email address(es)

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

Agency Contacts

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

‘Primary’ can only be selected for one record.

To view all agency contacts – click ‘Contacts’ from the agency information section on the homepage.
From this area you will be able to see anyone who is currently listed as a contact at your agency, as well as add, edit, deactivate or delete an agency contact.

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.
**Updating Program Information**

**Step 1:** To edit 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 information needed.

**Agency Email History**

If enabled by your United Way, the agency email history feature will allow you to access any past emails sent through the e-CImpact system.
**Resource Center**
The agency resource center is where you will be able to find any documents you may need to reference from United Way of Graham and Greenlee Counties. The resource center is located in the lower half of the left-hand navigation.

**Accessing Resources**

**Step 1**: Select desired resource item

![Diagram showing Step 1: Select desired resource]

**Step 2**: Click on the attachment link to open

![Diagram showing Step 2: Click to open attachment]
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.

![Diagram of application process]

- **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.

<table>
<thead>
<tr>
<th>Item (* Indicates Required Item)</th>
<th>Last Updated</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children’s Home Foundation</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Agency Information</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Alternative Education Program</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Program Information</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Program Logic Model Navigation</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Program Budget</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Program Demographics</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
<tr>
<td>Copy of Program Logic Model</td>
<td></td>
<td>Not Started</td>
<td></td>
</tr>
</tbody>
</table>

The top bar is the Overall Application status. The Status column is for the individual forms.

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

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

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

**Submitted**: When an application is in submitted status, you will no longer be able to make changes to the information on the forms. If you submit, and find you need to make an edit, you should contact Eva Jazwinski.
**Entering Information**

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

![Form Options](image)

**Save Options**

After entering information on your forms, you have multiple save options.

![Save Options](image)

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

**Save My Work and Mark as Completed:** This option is for when you have entered and reviewed your information and are ready to turn it in.
Switching Forms

There are two ways to switch forms within an application:

First: When you are finished with one form, click on ‘Save My Work and Return to Previous Page’, and then select the next form.

![Save My Work And Return To Previous Page]

Second: You can use the ‘Switch Forms’ option, located in the upper right hand corner.

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

![Switch Forms]

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

![Switch Forms]
Attachments

Uploading Attachments

Excepted file types for uploading documents:

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

Step 1: Open Supporting Documents

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.

![Image of file selection](image)

Step 4: ‘Save/Upload Attachment(s)’

![Image of save/upload attachment](image)

Viewing Attachments

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

![Image of document click](image)
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. Your application may have other submission questions added.

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.

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.

Questions and Answers
Your site may have the “Questions and Answers” feature enabled. This enables you to receive and answer specific questions from volunteers during the review process.

There are two ways to access ‘Questions and Answers’.

In the Application – a new tab will be added to the application if a volunteer has a question regarding that specific application.
In the left-hand Navigation, at the bottom of the investment/application list – All questions and answers will be listed.
Responding to a Question – In the Application

**Step 1:** Open the application

![Step 1 Image](image1.png)

**Step 2:** Go to ‘Questions and Answers’ tab

![Step 2 Image](image2.png)

**Steps 3:** Select ‘Answer’ for desired question

![Steps 3 Image](image3.png)
Step 4: Enter your answer to the question, then ‘Save and Return to Previous Page’

Once the answer is saved, it is approved by your Eva Jazwinski, and then displays to the volunteers reviewing your application.

Responding to a Question – From the overall ‘Questions and Answers’ list

Step 1: Click on ‘Questions and Answers’ in the left-hand navigation
Step 2: Click ‘Respond’ next to desired question

![Image of Questions and Answers table]

Step 3: Enter your answer to the question, then ‘Save and Return to Previous Page’

![Image of question and answer entry]

Print / Export - Questions and Answers

Currently this can only be done through the overall ‘Questions and Answers’ area

![Image of Questions and Answers with Export option]