United Way of Southeastern Idaho

2021-2022

Agency Training Manual

275 S. 5th Ave.,
Ste. 250
Pocatello, ID 83201

e-CImpact Platform brought to you by:

ISU Credit Union

For Support, please contact:

Molly Olson

molly@unitedwaysei.org

208-232-1389

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=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:

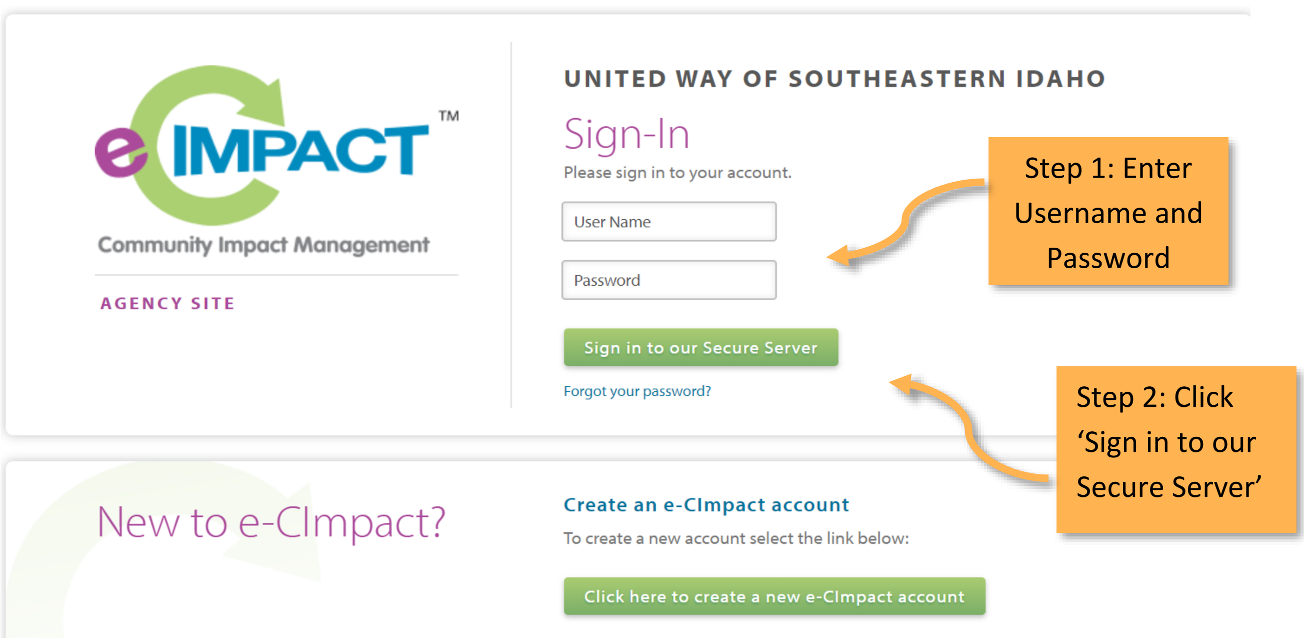
Currently, the default agency username is the email address of the agency's **primary contact**.

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.

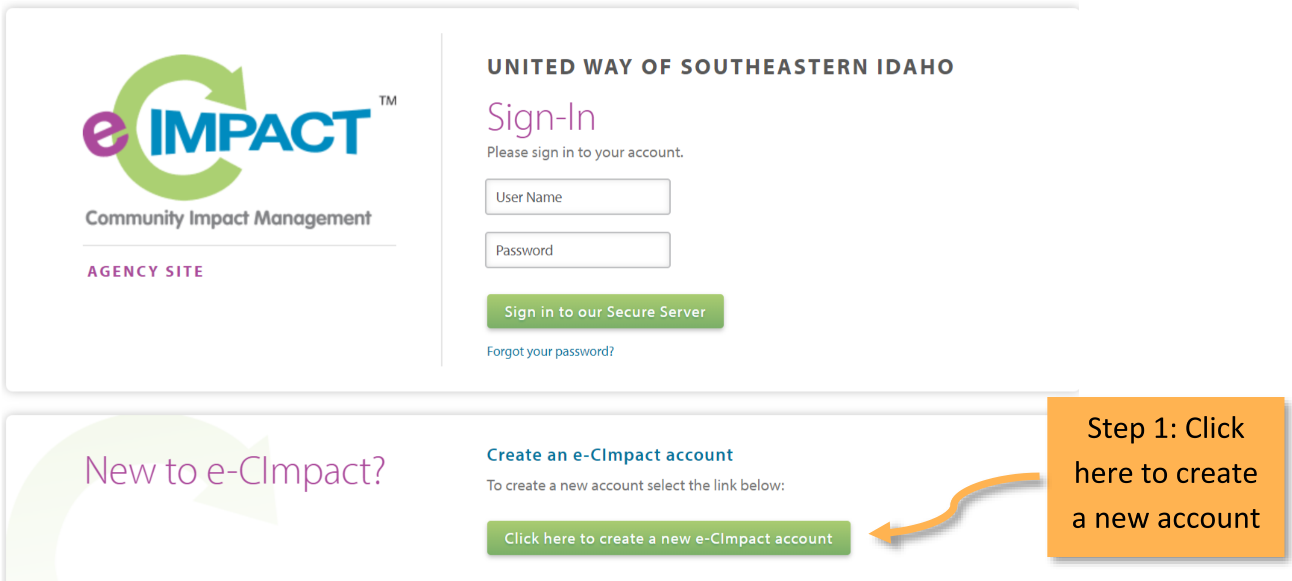
Step 2: Click 'Sign In to our Secure Server' or use the enter key.



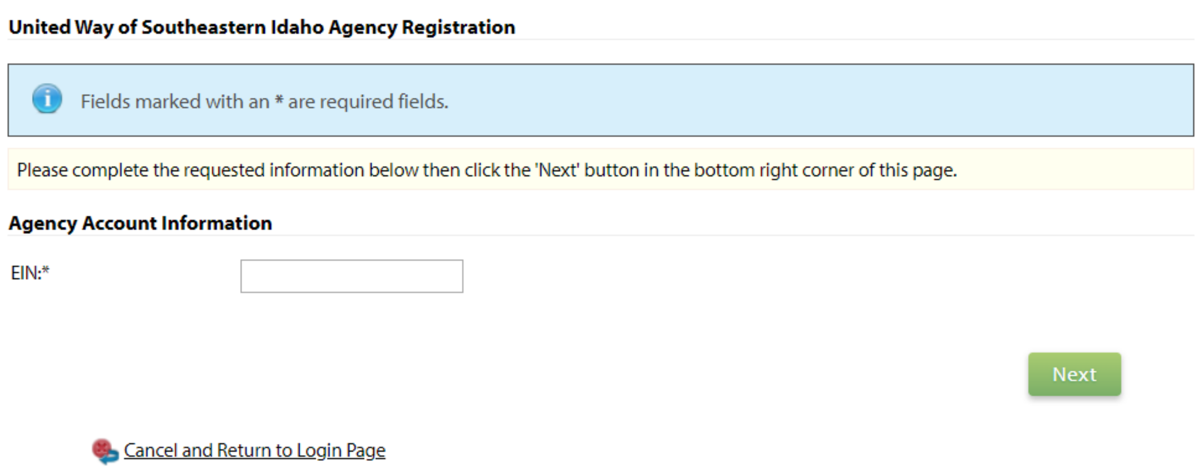
Registering a New Agency

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.'



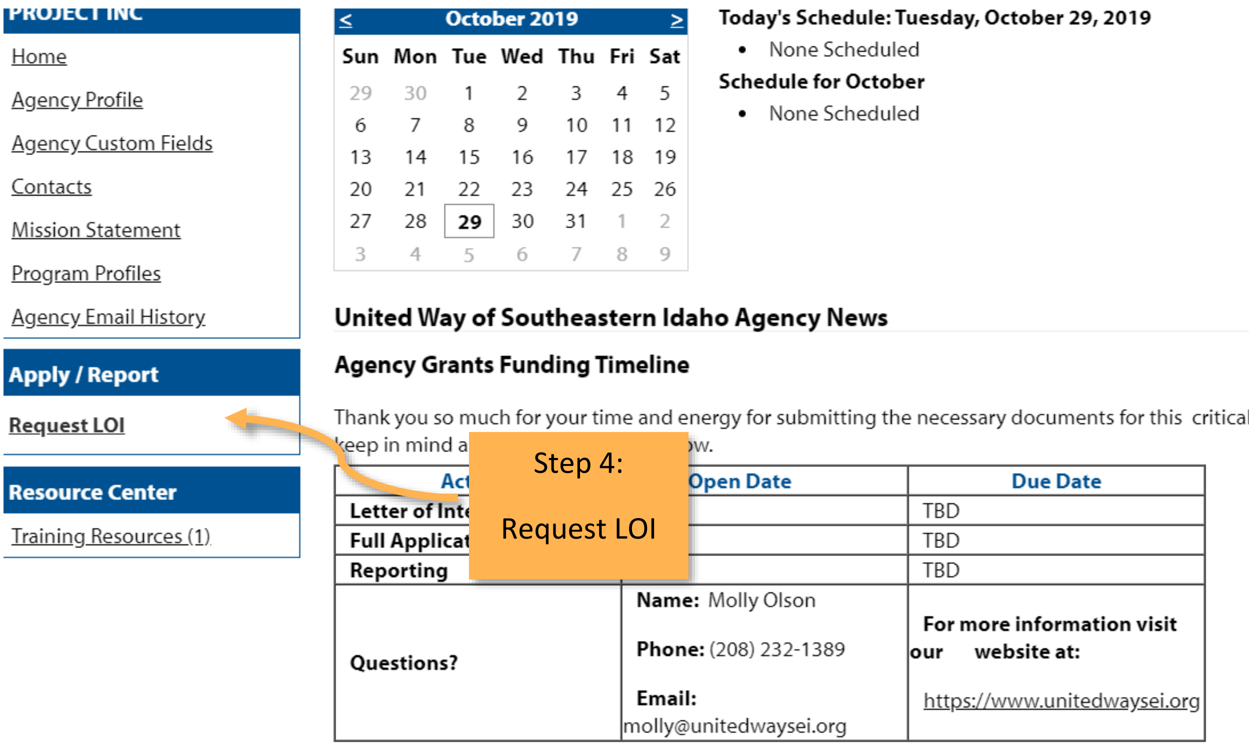
Step 2: Please read all directions carefully, and then click 'Next' to continue with your registration process.



**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.*

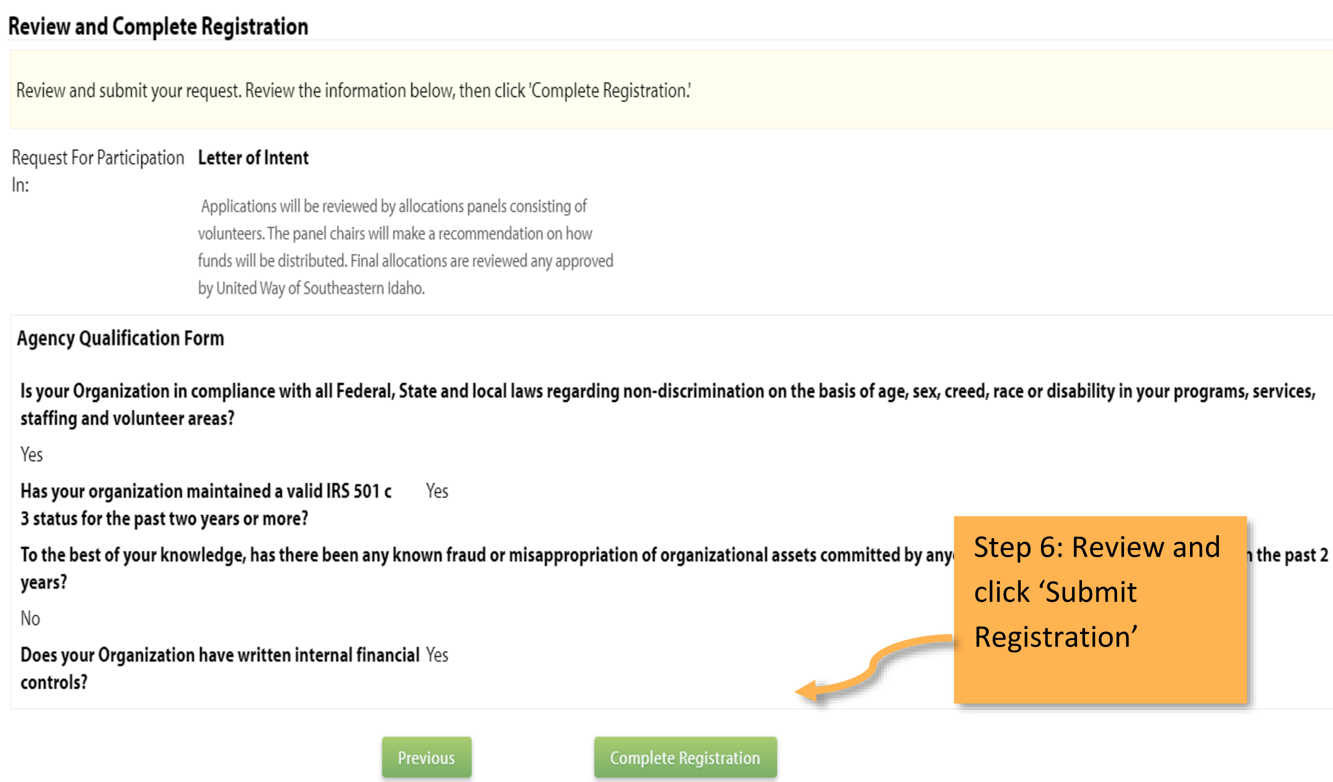
Step 3: Please enter all required information regarding your agency. Then proceed to the next page. Please note what username and password you create for your account.

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



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 <u>not</u> 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.’

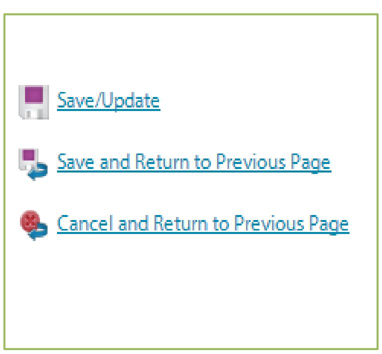


Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email.

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

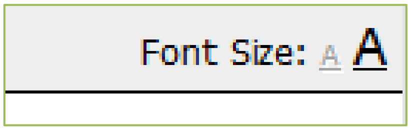
The navigation links in e-CImpact are consistent throughout the site.



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.



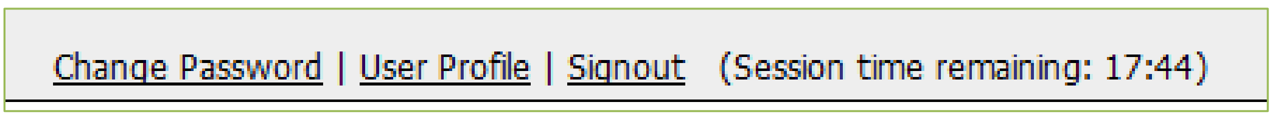
Changing the Font Size: Located in the upper right hand corner of the agency site, click the large 'A' to increase the font size. Click the smaller 'A' to decrease the font size.

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

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:

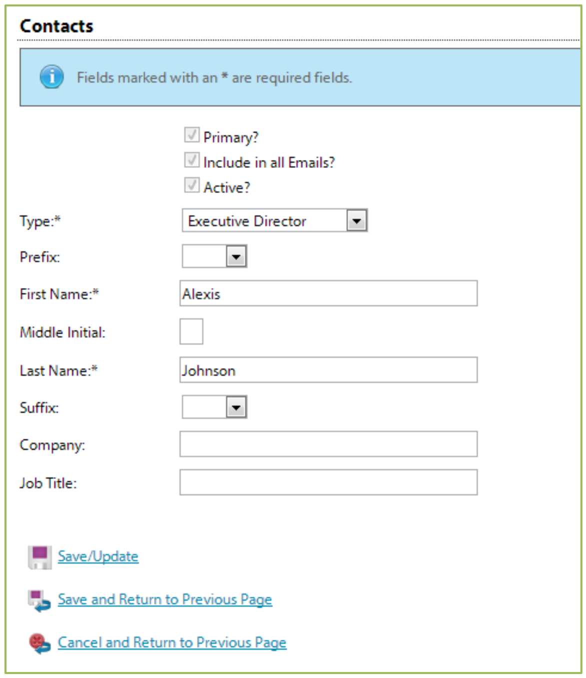
- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the groups of alpha, numeric, or special characters.
- Characters NOT accepted are: ", % or any white-space.

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.

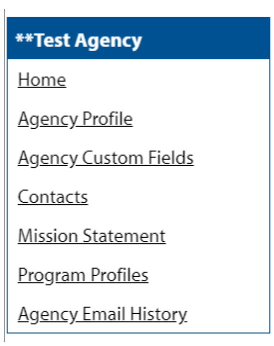


Enter any necessary information, and then click ‘Save/Update’.

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.

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

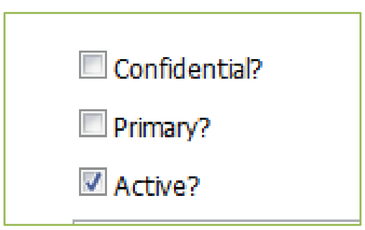
Email Addresses

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

Add New Email Address

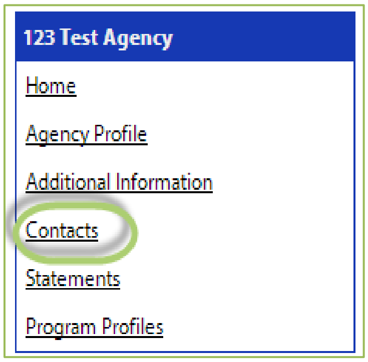
'Account Names' is a place for any other names for your agency, or if your agency name is abbreviated you may place the legal name here.

Agency Contacts



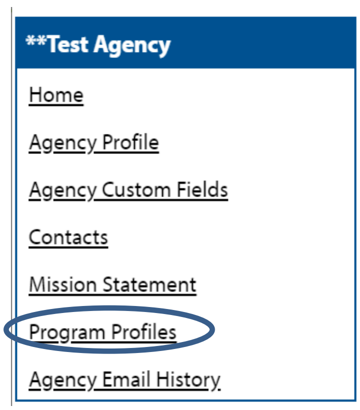
When adding a new record, or updating existing records, be sure to select 'Active' appropriately.

'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.

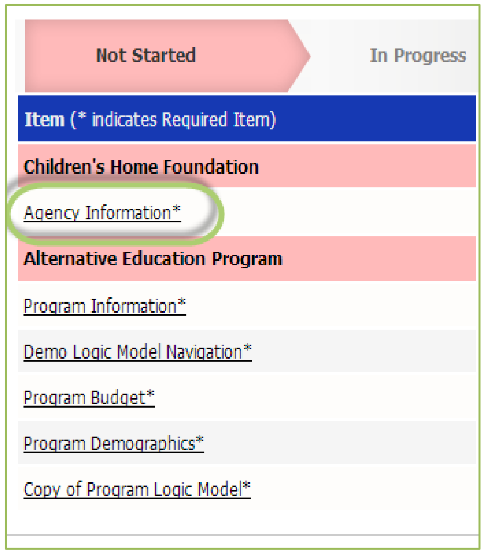
The Basics of your Applications / Grant Process

Accessing the Application / Grant Process

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

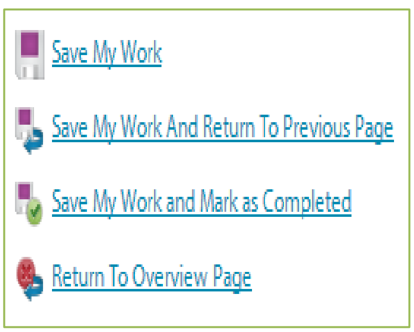
Entering Information

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



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.

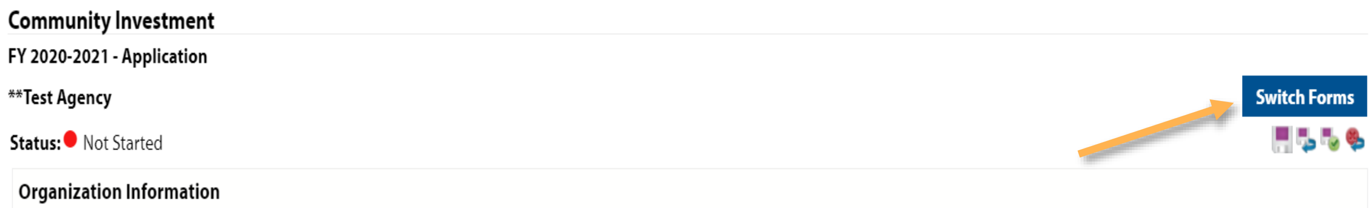
Switching Forms

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.

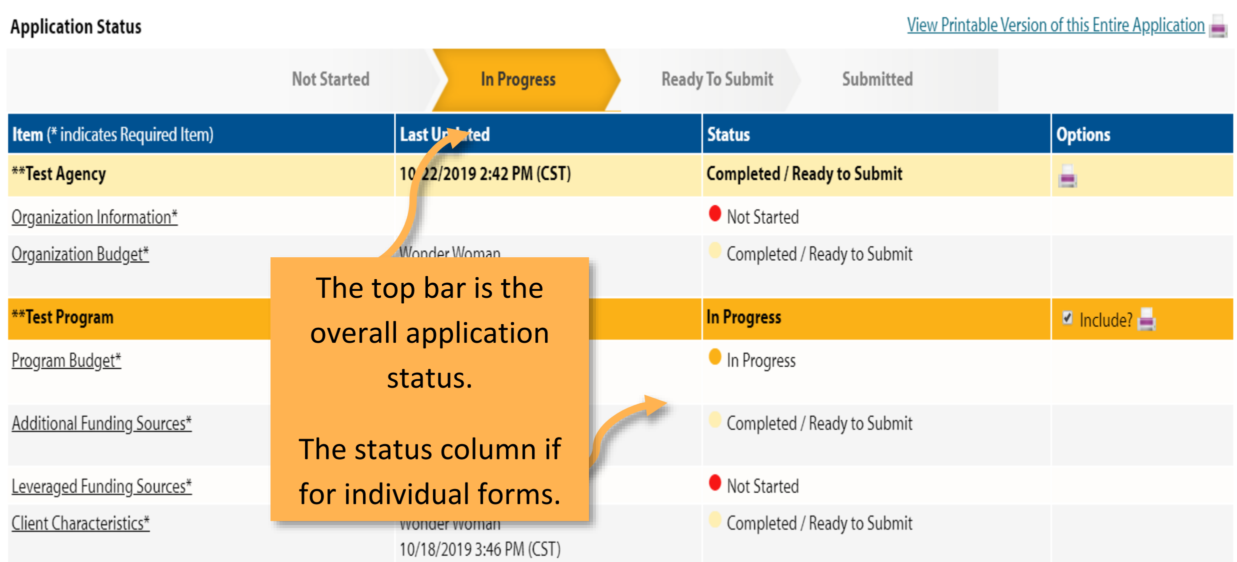
Step 1: Click ‘Switch Forms’ to view the list of available forms.



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

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 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'

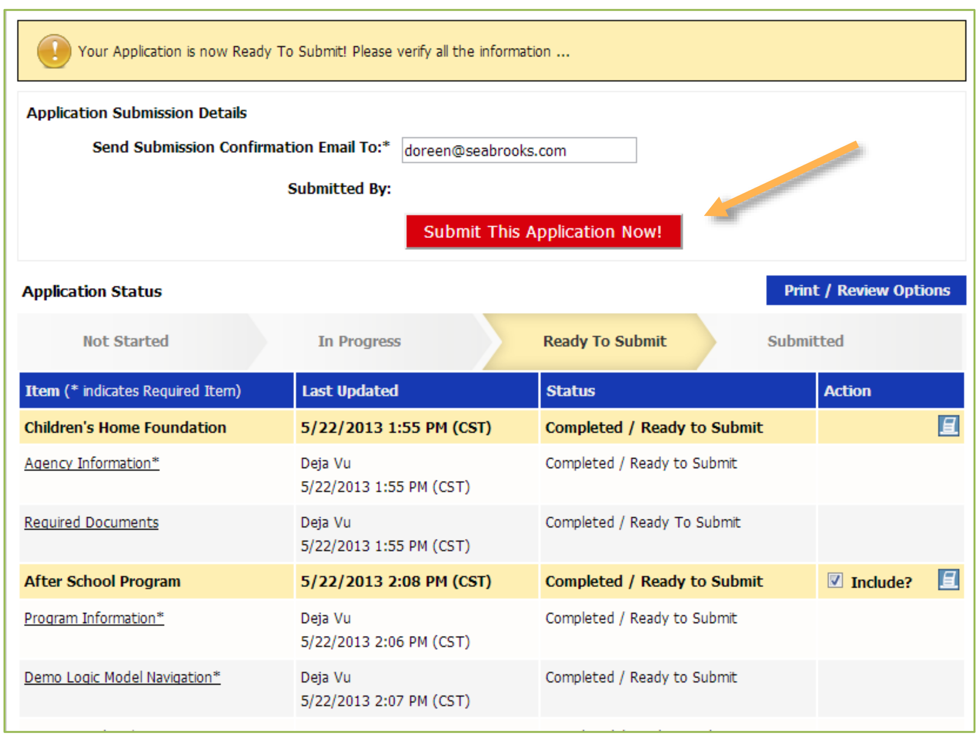
Step 1: Open form.

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.

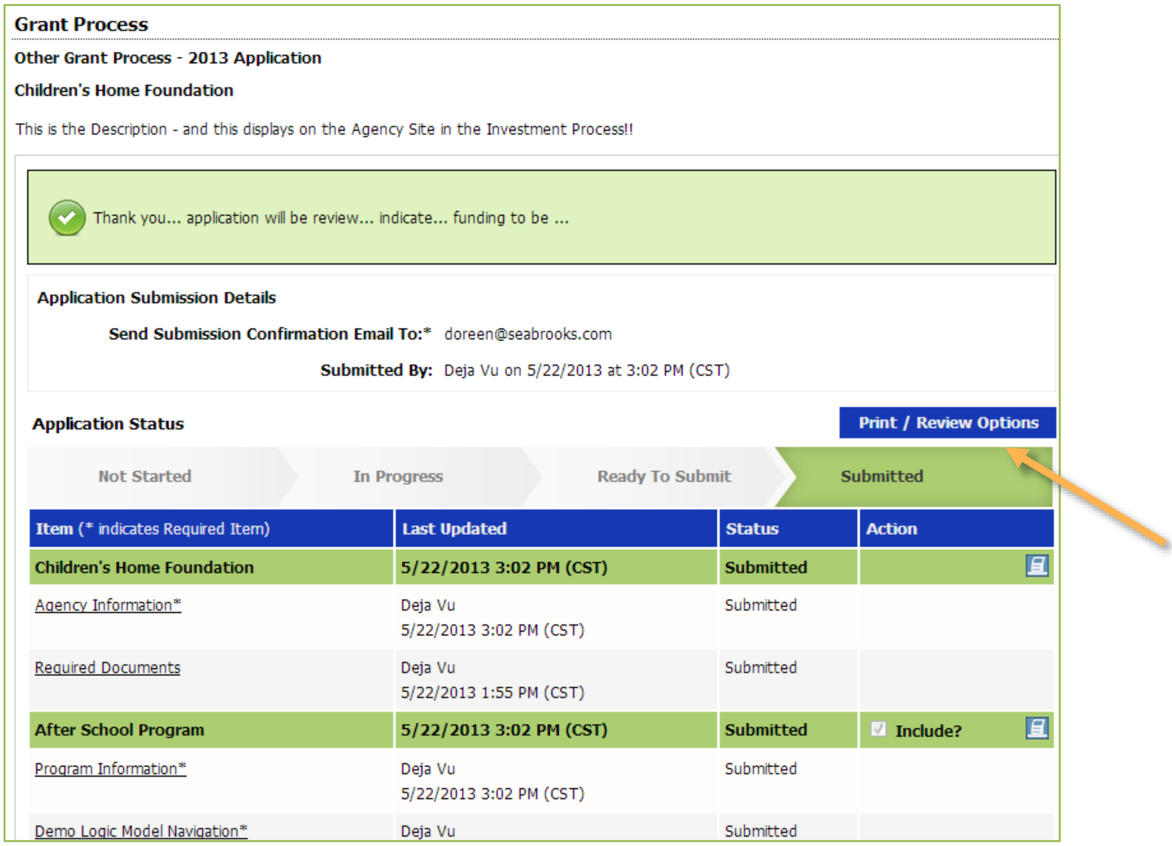
Step 3: Once all forms are 'Completed / Ready to Submit', the 'Submit This Application Now!' option will appear at the top of the page.

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

Step 5: Select 'Submit This Application Now!'



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.



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.