

Technical Guidance for Grant Software:  
How to create an account  
&  
To submit an application

**2019-2020 Community Fund**

Updated: January 2019



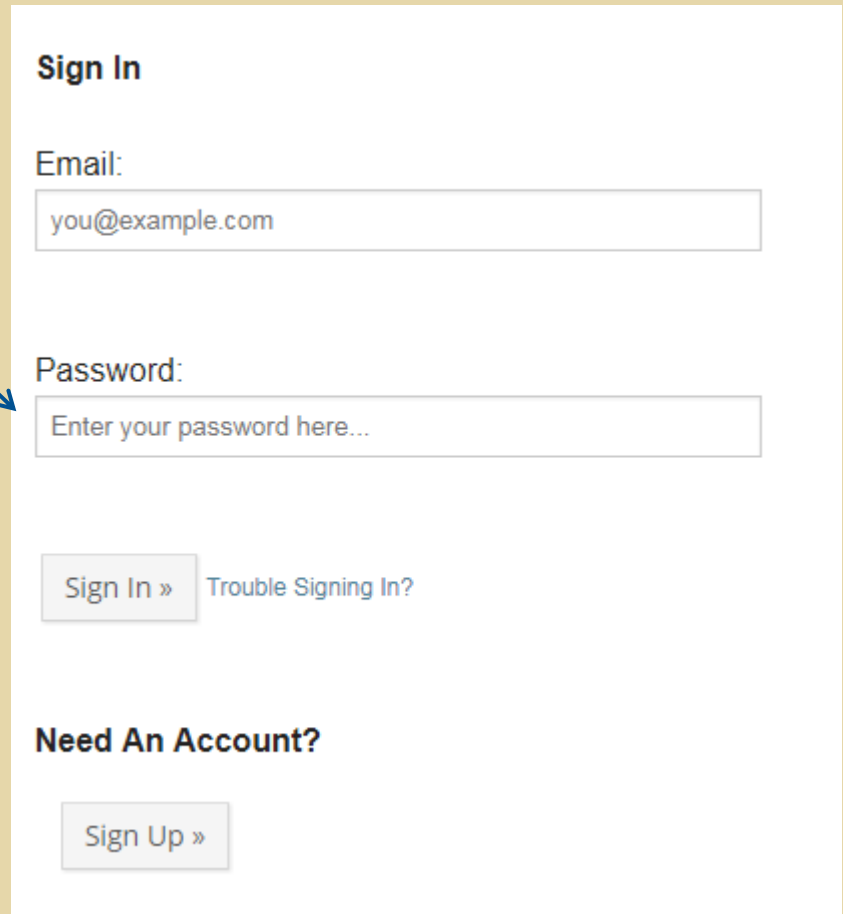
**United Way of the  
Dutchess-Orange Region**

# Website: <https://uwdor.fluidreview.com/>

If you have not created an account in our database, you will need to create an account.

**Returning users  
will sign in here.**

**New users need to  
create an account.**



**Sign In**

Email:

Password:

[Trouble Signing In?](#)

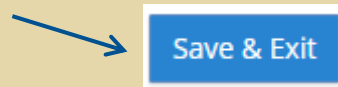
**Need An Account?**

## New users:

To be a user on this site, these forms will need to be completed:

- Agency Profile Form
- Application Certification Form
- Organization Information Form
- Counter-Terrorism Compliance Form

After **each** form is complete, click on “Save & Exit” button at the bottom of the screen to move onto the next form.

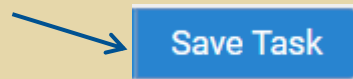


## New users:

Next step is to upload 4 documents:

- Organization Operating Budget
- IRS Tax Exempt Status Determination Letter
- IRS 990 or 990 EZ Form
- Board of Directors Roster

After **each** upload, click on “Save Task” button at the bottom of the screen to move onto the next upload.



# Congratulations!

You are now an active user on the granting portal and may begin the community application.

# Returning Users

Open the Agency Profile Form. Click on View to open.

Task	Status	Actions
Agency Profile Form	Complete	<a href="#">View</a>   <a href="#">Edit</a> <a href="#">Delete</a>
Application Certification	Complete	<a href="#">View</a>   <a href="#">Edit</a> <a href="#">Delete</a>

Verify and change any contact names and emails.

# Returning Users

For the new funding cycle, the rest of the tasks need to be completed.

Home

**Submissions**

Your Tasks

Task	Status	Actions
Agency Profile Form	COMPLETE	View   Edit   Delete
Application Certification 2019-2020	INCOMPLETE	Start
Organization Information 2019-2020	INCOMPLETE	Start
Counter-terrorism Compliance 2019-2020	INCOMPLETE	Start
Organization Operating Budget 2019-2020	INCOMPLETE	Start

Please upload the agency's latest operating budget.

IRS Tax Exempt Status Determination letter 2019-2020	INCOMPLETE	Start
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# The Application Process-what is asked of applicants:

The application process requires the following forms to complete for each application:

- Community Application
- Output and Outcome
- Program Budget



## The Application Process-what is asked of applicants:

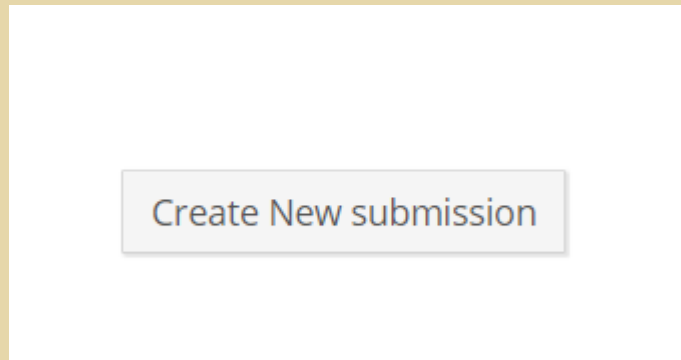
The application process requires the following documents to be uploaded:

- Organizational Financial Audit/Review
- Annual Report
- Corresponding Management Communication Letters (if agency's program requires)

# How to submit an application

Once you have completed the tasks, scroll down to the bottom of the screen to create a new submission.

Click on “Create New Submission”.



# How to submit an application

Enter in the program name for the application.

Click on “Get Started”.

**Hi, Sally**

You haven't submitted anything yet.

**Create a new submission?**

Please fill any of the necessary information shown below (if applicable) to get started.

Please enter program name for the application::

ENTER PROGRAM  
NAME HERE

Get Started

# Next screen will show you the 5 tasks that need to be completed.

**United Way of the Dutchess-Orange Region**

Home » Dutchess and Orange Program

**Dutchess and Orange Program** (A-5527119230418888063384859861892094753161)

Application Round

Task	Status	Actions
Community Application	INCOMPLETE	Start
Output and Outcome	INCOMPLETE	Start
Program and Budget	INCOMPLETE	Start
Organizational Financial Audit/Financial Review	INCOMPLETE	Start

Please upload your organization's operating budget.

Annual Report	INCOMPLETE	Start
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Please upload your agency's latest Annual Report.

Edit Information

Progress

This submission is 0.0% complete. You still need to:

- Complete task "Community Application"
- Complete task "Output and Outcome"
- Complete task "Program and Budget"
- Submit

Withdraw Submission

Create Another Submission

Click "Start" to begin the first task.

Fill out the application and click on Save. Each Save moves you to the next task.

## United Way of the Dutchess-Orange Region

Program name

Home » **Dutchess and Orange Program** » Community Application

### Community Application

#### 2018-2019 Community Application

Program Name

Funding Cycle

2018-2019

Type program name again here.


# How to upload more than 1 MOU/Letter of Support

**United Way of the Dutchess-Orange Region**

Home » Dutchess and Orange Program » Corresponding Management ...

**Corresponding Management Communication Letter**

Programs that rely on outside organizations to accomplish stated goals (i.e. school districts) must provide letters of commitment from the outside organization.



**Drop files here to upload**

OR

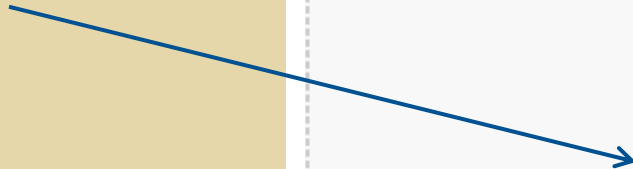
[Browse for files](#)

**UPLOADED FILE(S)**

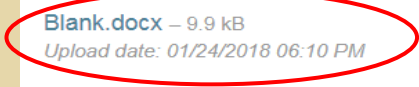
<b>Blank.docx</b> – 9.9 kB <i>Upload date: 01/24/2018 06:10 PM</i>	✕
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[← Back to Submission](#)

Click to add an additional file.

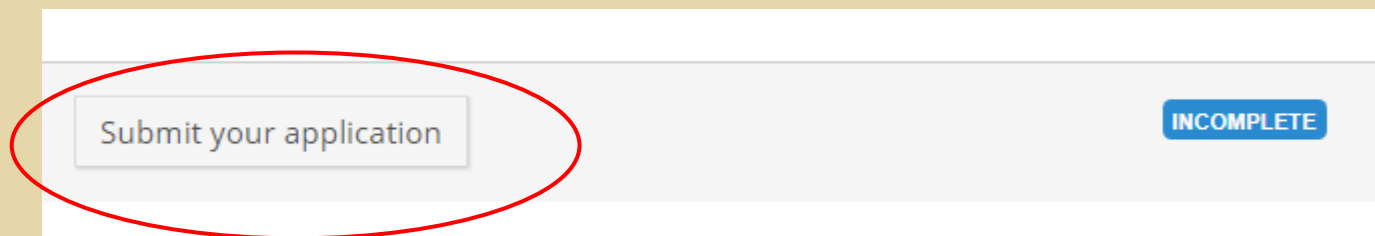


First uploaded file.



Once all files are uploaded, click on “Back to Submission”.

Final Step.....  
Click on SUBMIT



Submit your application

INCOMPLETE

# Congratulations!

Resourc



## Welcome to United Way of the Dutchess Orange Region's Community Fund Grant Portal

**United Way of the  
Dutchess-Orange Region**

Your submission has been submitted.

[Home](#) » [Dutchess and Orange Program](#) » [Submit your application](#)

**Submit your submission**

Thank you. Your application has been submitted. You will be receiving an email shortly.

[← Back](#)



# If your agency would like to apply for another program:

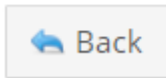
## United Way of the Dutchess-Orange Region

Your submission has been submitted.

[Home](#) » [Dutchess and Orange Program](#) » [Submit your application](#)

### Submit your submission

Thank you. Your application has been submitted. You will be receiving an email shortly.

 Back

Click on  
"Back" button

Click on “Create New Submission” and begin the process to submit another application.

Your submissions

Title	Category	Status
Dutchess and Orange Program	Applicants	SUBMITTED

Create New submission

**Questions?**

**Email us at [ci-inbox@uwdor.org](mailto:ci-inbox@uwdor.org)**

**Thank you**



**United Way of the  
Dutchess-Orange Region**