

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

**2021-2022 Community Fund**

Updated: January 2021

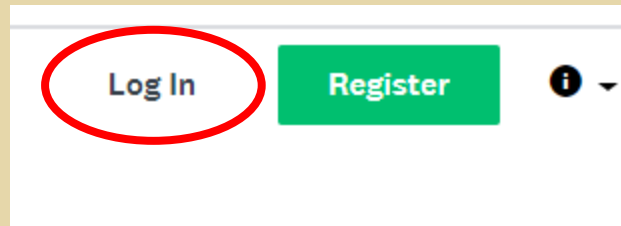


**United Way of the  
Dutchess-Orange Region**

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

For returning users:

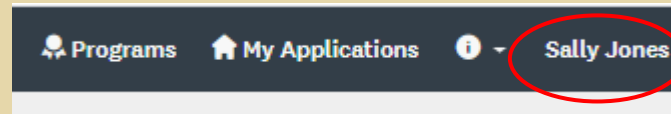
In the top right corner on the website, click on Log In.



## Returning users

Please update the Agency Profile form.

Click on your name in the top right corner.




Select MY ACCOUNT from the drop down list.

Click on **ELIGIBILITY.**

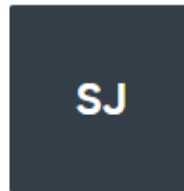
## Account Settings

 My Profile >

 Notifications

 Eligibility

### Profile Photo



Choose file...

Browse

### Personal Info

**Click on UPDATE YOUR ELIGIBILITY PROFILE.  
The form is now open to be edit. Click on SAVE MY  
PROFILE at the bottom to save the updates.**

## Account Settings

-  My Profile
-  Notifications
-  Eligibility >

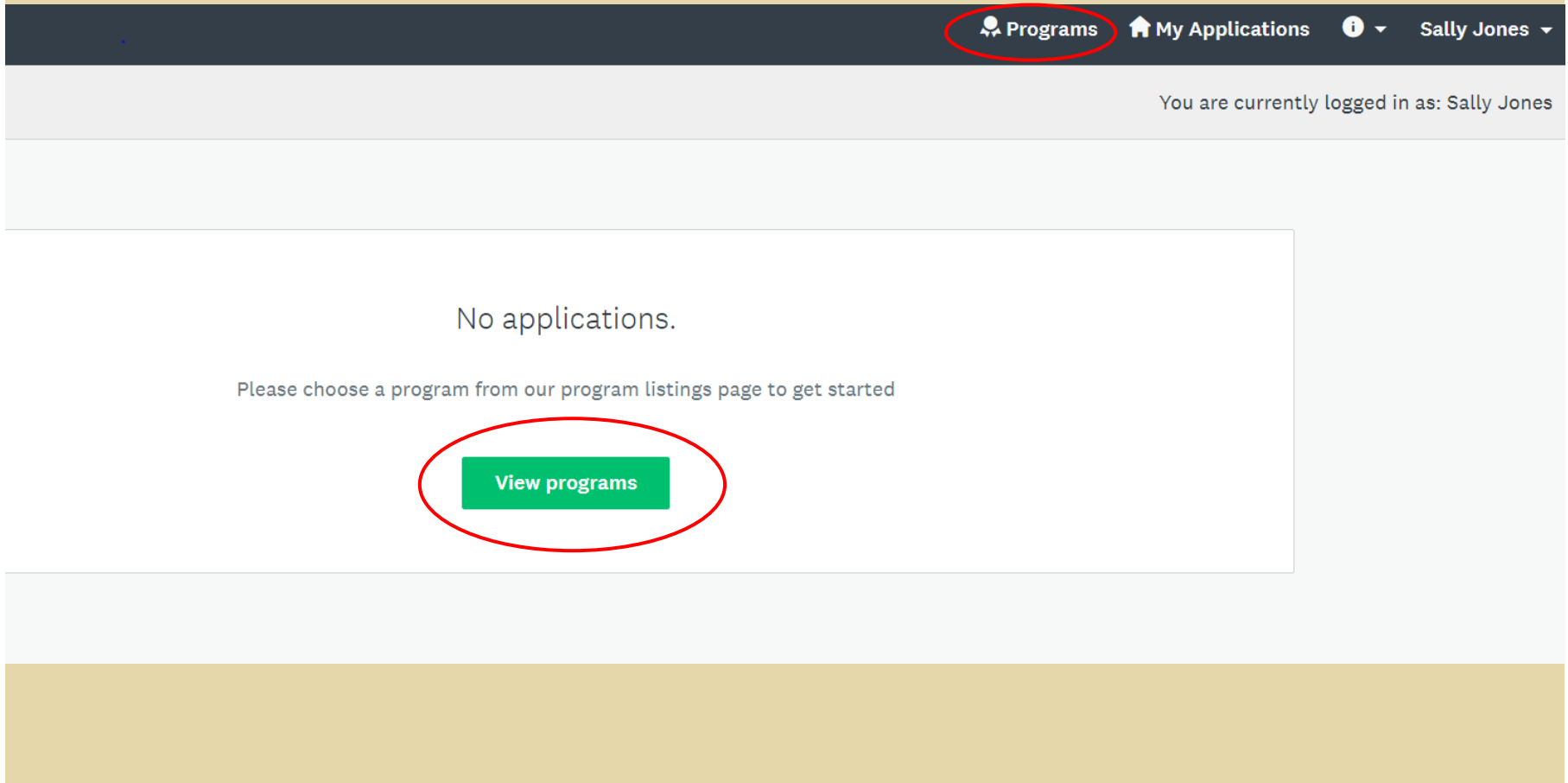
[Update your eligibility profile](#)

### Agency Profile Form

#### Agency Details

Agency/Organization Name	UWDOR
EIN	12345678
Website	(No response)
Street	75 Market Street
City	Poughkeepsie
State	NY
Zip Code	12601
Mailing Address	75 Market Street
Mailing City	Poughkeepsie
Mailing State	NY

To begin the application process for returning users, click on green button, “View Programs” or click on “Programs” on the top bar.



Click on green button, “More”.

You are currently logged in as: Sally Jones



United Way of the  
Dutchess-Orange Region

Eligible Programs ▾

Search programs..



### Community Fund Grant

Accepting applications from Jan 29 2021 02:00 PM (UTC) to Mar 19 2021  
09:15 PM (UTC)

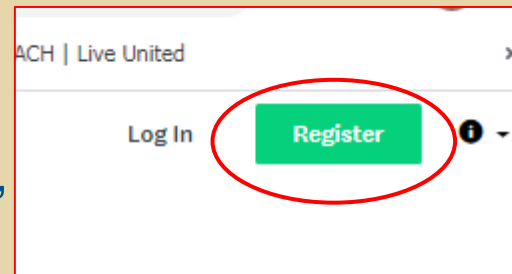
MORE >

## New users:

In the top right corner:

Step 1:

Click on green button, “Register”

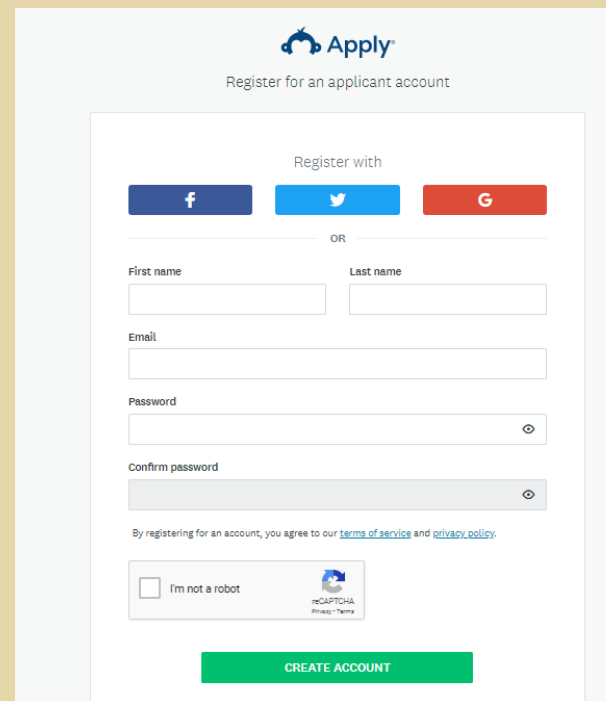


Step 2:

Follow instructions  
on creating an account.

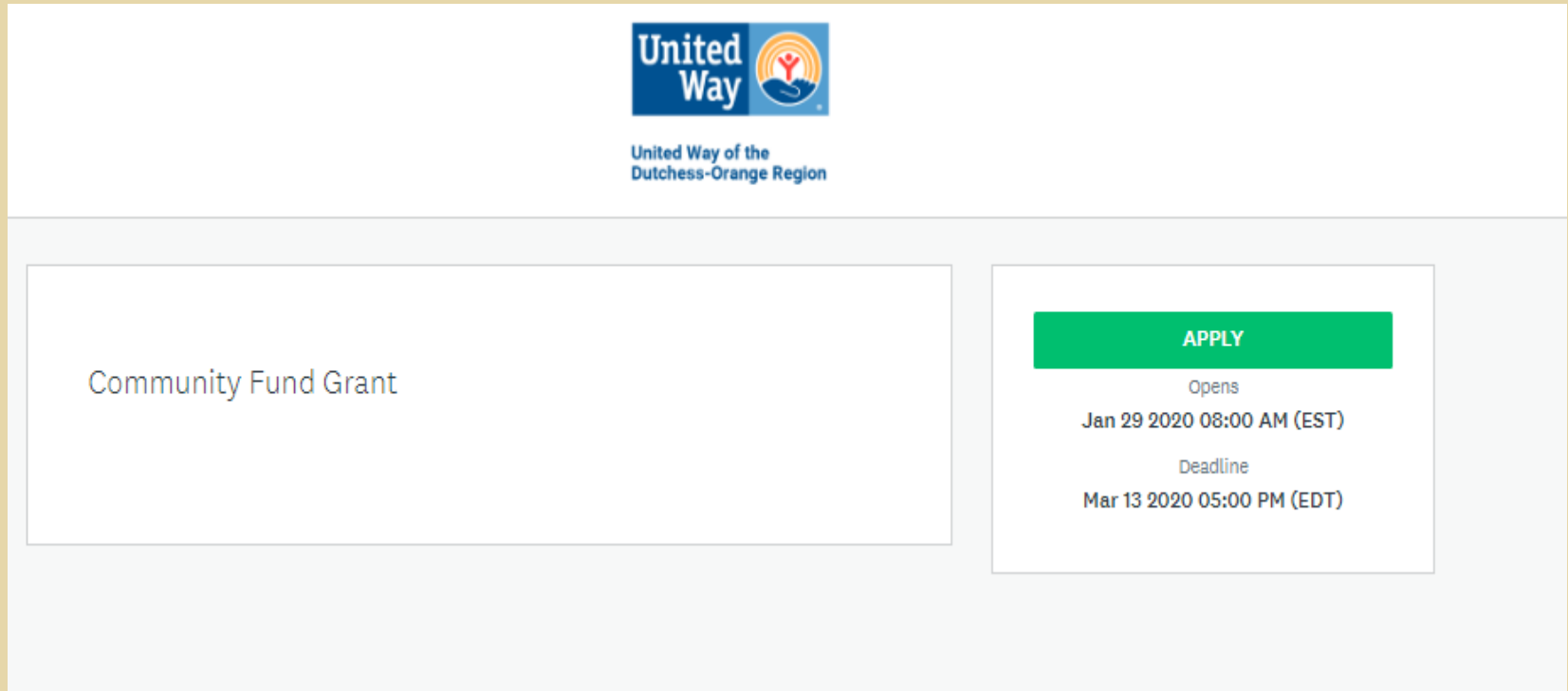
Step 3:

You will receive an email.  
Follow instructions from  
the email.

A screenshot of the 'Apply' registration form. The form is titled 'Apply' and 'Register for an applicant account'. It offers three social media registration options: Facebook, Twitter, and Google+. Below these is an 'OR' separator. The form includes fields for 'First name', 'Last name', 'Email', 'Password', and 'Confirm password'. There is a checkbox for 'I'm not a robot' and a reCAPTCHA logo. At the bottom is a green 'CREATE ACCOUNT' button. A small disclaimer at the bottom states: 'By registering for an account, you agree to our [terms of service](#) and [privacy policy](#).'



Once you register, you will be brought to your home screen.



Click on the green button, “APPLY”.

Click on green button, “MORE”.

United Way of the Dutchess-Orange Region

## Programs

### Community Fund Grant

Accepting applications from Jan 29 2020 08:00 AM (EST) to Mar 13 2020 05:00 PM (EDT)

[MORE >](#)

1 - 1 of 1 Programs

## **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
- Application Certification
- Organizational Information
- Counter Terrorism Compliance

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

The application process requires the following documents to be uploaded:

- IRS Tax Exempt/Letter of Determination/501(c)3 status
- Organizational Financial Audit
- IRS 990
- Annual Report (if your agency has one)
- Corresponding Management Communication Letters (if agency's program requires)
- Board of Directors Roster
- Organization Budget

To begin the application, click on the green button, “APPLY”.

United Way  
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Community Fund Grant

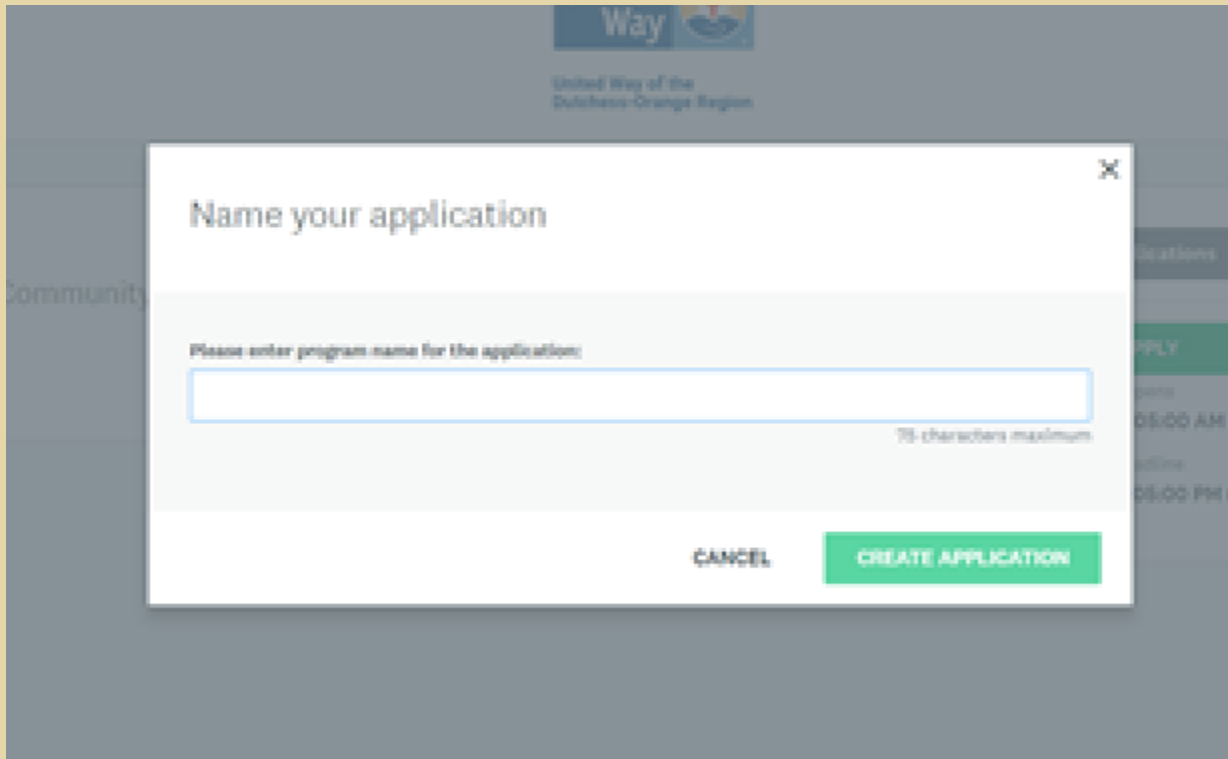
6 Applications

**APPLY**

Opens  
Jan 29 2020 08:00 AM (EST)

Deadline  
Mar 13 2020 05:00 PM (EDT)

# Name your application/program.



The screenshot shows a web application interface for the United Way of the Dutchess-Orange Region. A modal dialog box is open, titled "Name your application". The dialog contains a text input field with the placeholder text "Please enter program name for the application:". Below the input field, it indicates "75 characters maximum". At the bottom of the dialog, there are two buttons: "CANCEL" and "CREATE APPLICATION". The background of the web application is partially visible, showing the United Way logo and some navigation elements.

Listed are the tasks that need to be completed. As you go through each task, the completion status on the left side will increase.

8884159853  
ID: 8884159853

APPLICATION ACTIVITY

Last edited: Jan 28 2020 06:05 PM (UTC)

REVIEW SUBMIT

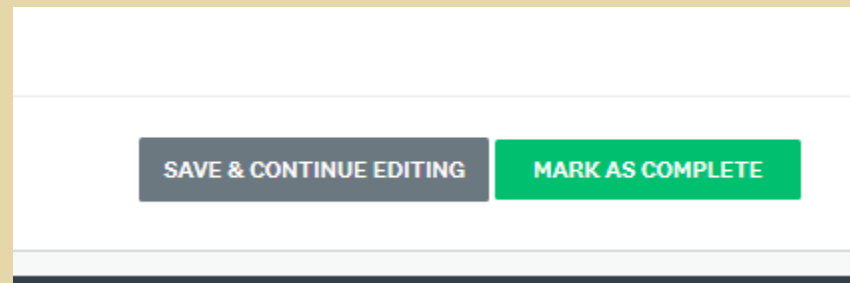
Deadline: Mar 13 2020 09:00 PM (UTC)

Your tasks

- Community Application 2019-2020  
Cannot be modified
- Output and Outcome 2019-2020  
Cannot be modified
- Program and Budget 2019-2020  
Cannot be modified
- Organizational Financial Audit/Financial Review 2019-2020 (optional)  
Cannot be modified
- Annual Report 2019-2020 (optional)  
Cannot be modified
- Memorandum of Understanding 2019-2020 (optional)

**Save the forms as you go along. The save buttons are located at the bottom of the forms.**

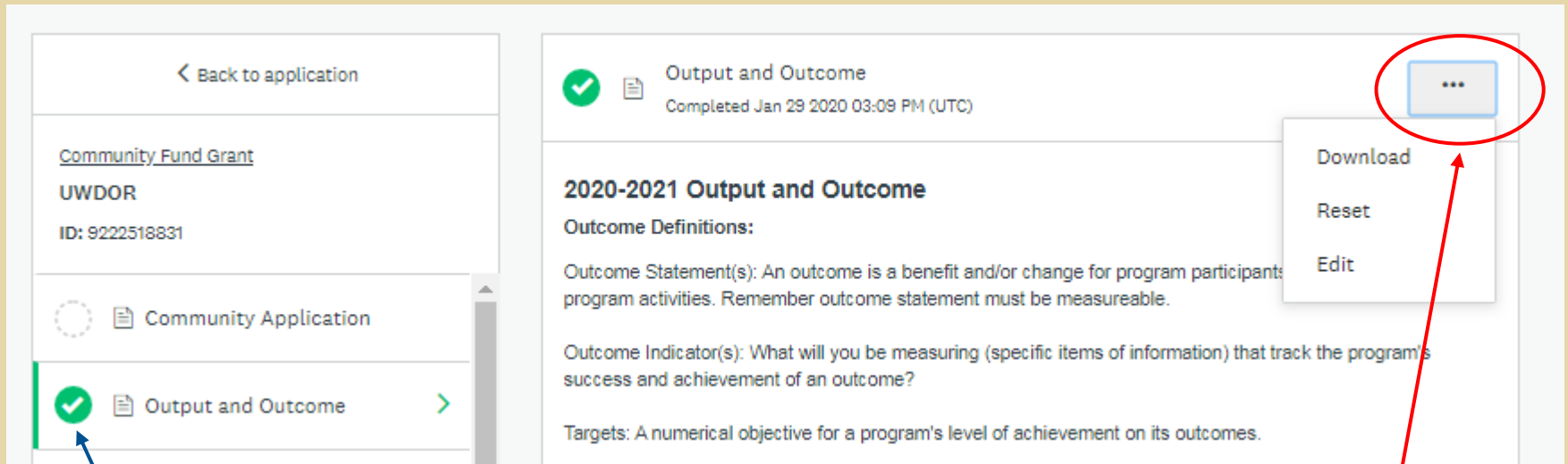
**As you go through the different tasks/form, and the form is complete, click on green button, “MARK AS COMPLETE”.**



The task will now show that it is complete.



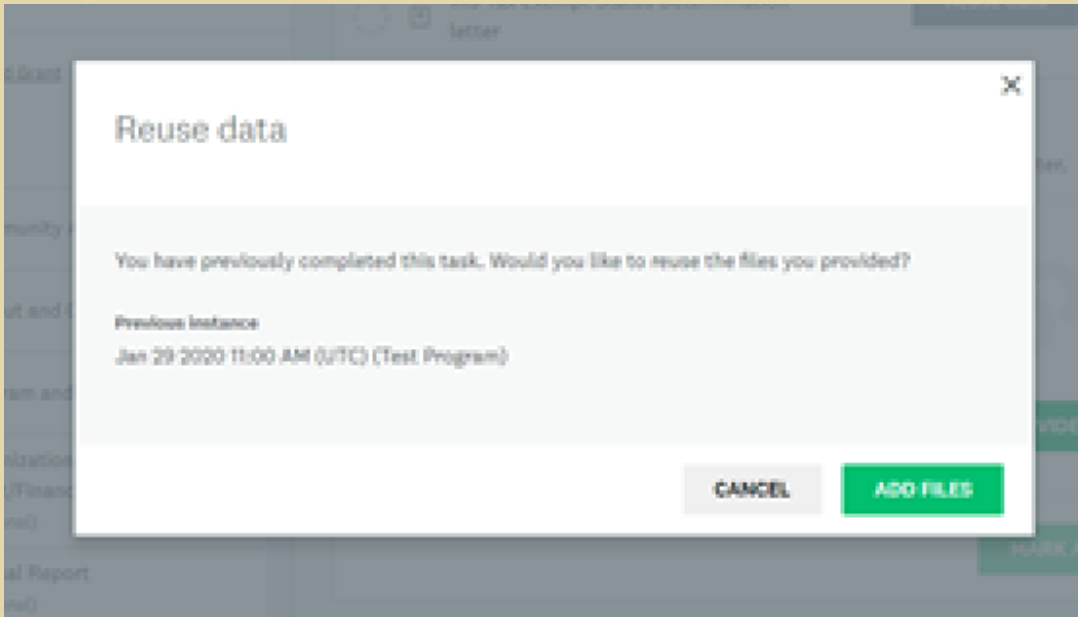
# Once a form is marked as complete, your screen will look like this:



Shows that task is complete.

Click on ellipsis: download, reset or to edit the form

**Some tasks you will have an option to reuse data or files. For those tasks, the option will pop up.**



If you want to reuse data, select which file and click ADD FILES. If not, select CANCEL.

If you do reuse data, **VERIFY** that the data is up to date and correct.

If you clicked **CANCEL** on the reusable data, you will have the option to upload a new file or complete the form.

The screenshot shows a web form titled "Organizational Audit/Financial Review". At the top right, there is a dark grey button labeled "Reuse data" with an information icon (i) and a menu icon (three dots). A red arrow points from a text box on the right to this button. The text box contains the text "The option to reuse data." Below the title bar, there is a section for "Task instructions" with a "Hide" link. The main instruction reads: "Please upload your organization's latest audit." In the center of the form, there is a large grey upload icon (an arrow pointing up from a document). Below this icon is a green button labeled "ATTACH FILE" and a blue link labeled "Show accepted formats". A red circle is drawn around the "ATTACH FILE" button. At the bottom right of the form, there is a green button labeled "MARK AS COMPLETE".

After each upload, click on green button, “Mark as Complete”.

The screenshot shows a task interface for "Memorandum of Understanding". At the top, there is a title bar with a circular icon, a plus sign, the title "Memorandum of Understanding", and a three-dot menu icon. Below the title bar, there is a section for "Task instructions" with a "Hide" link. The instructions state: "Programs that rely on outside organizations to accomplish stated goals (i.e. school districts) must provide letters of commitment from the outside organization." Below the instructions is a large grey upload icon. Underneath the icon is a green button labeled "ATTACH FILE" and a link labeled "Show accepted formats". Below the upload area is a list of files. The first file is "Mid Year Report Training" with a PDF icon, filename "ning.pdf", and added date "Jan 29 2020". At the bottom right of the interface, there is a green button labeled "MARK AS COMPLETE", which is circled in red.

Community Fund Grant  
8884159853  
ID: 8884159853

- Organization Information
- Counter-terrorism Compliance
- Organization Operating Budget
- IRS Tax Exempt Status Determination letter
- IRS 990 or 990 EZ form
- Board of Directors Roster

10 of 10 required tasks complete

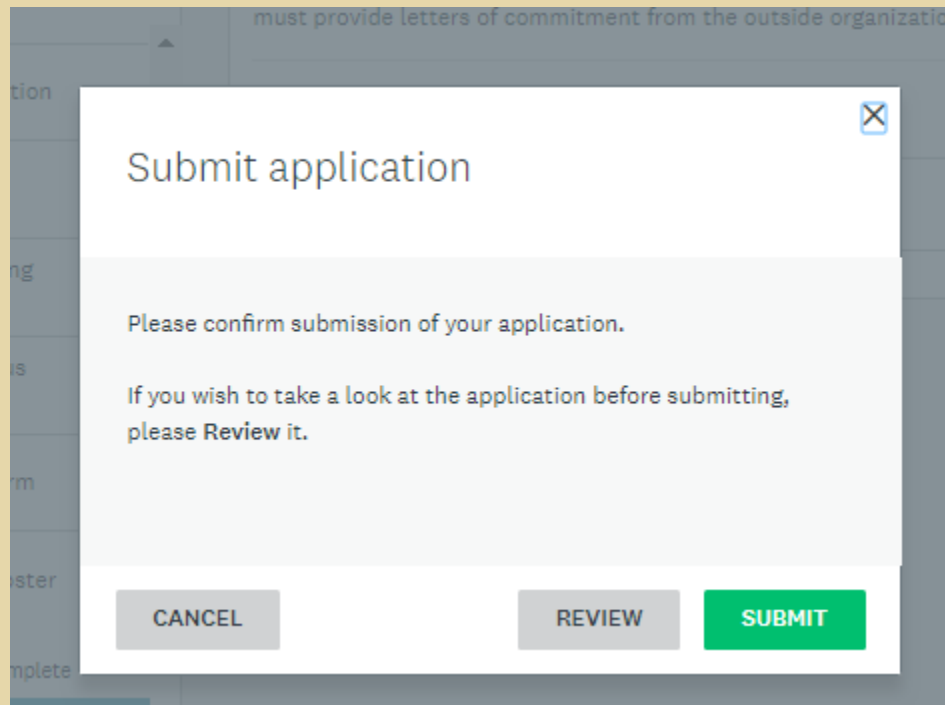
Last edited: Jan 29 2020 03:33 PM (UTC)

REVIEW **SUBMIT**

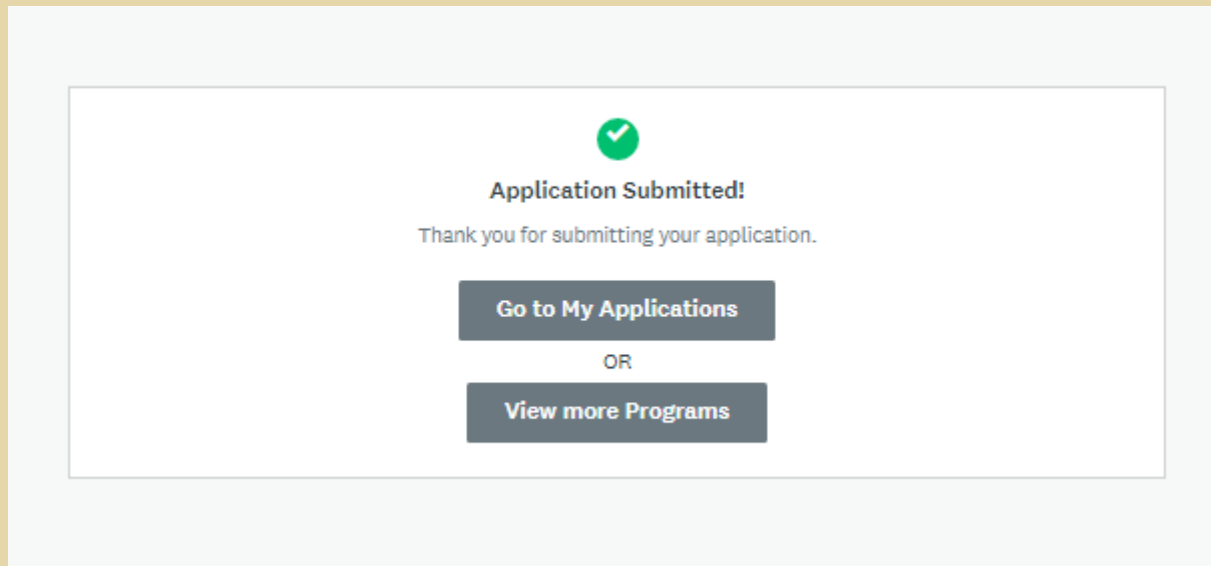
Deadline: Mar 13 2020 09:00 PM (UTC)

Once all 10 tasks have been completed, click on the green button, "SUBMIT".

## Final confirmation before Clicking on SUBMIT

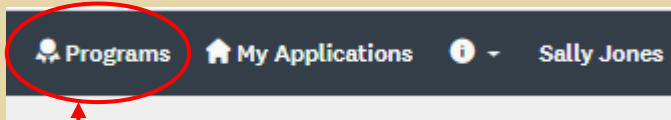


**A pop up message will show confirmation.  
An email will also be sent to the user's email account.**



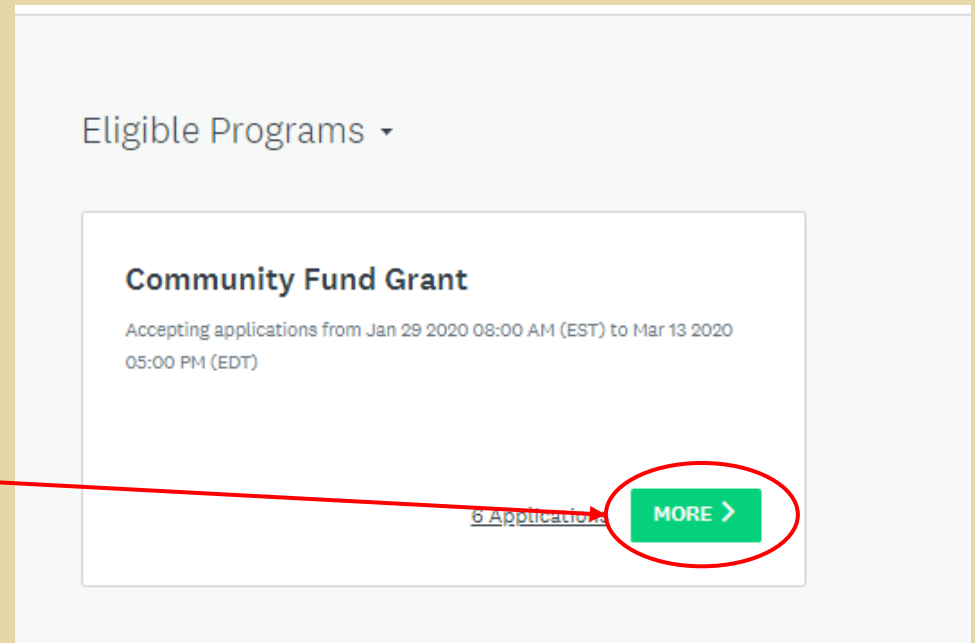
If your agency would like to apply for another program:

In the top right corner of the screen:



1. Click on Programs

2. Click on MORE





Click on green button, “APPLY”.



United Way of the  
Dutchess-Orange Region

Community Fund Grant

6 Applications

**APPLY**

Opens

Jan 09 2020 08:00 AM (EST)

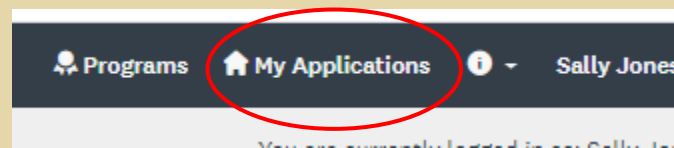
Deadline

Mar 13 2020 05:00 PM (EDT)

**Follow the same instructions to begin applying for an additional program.**

**To download and save the application:**


**In the top right corner, click on “My Applications”.**




# Click on “View” to open the application.

<input type="checkbox"/>	Community Fund Grant	Test Program	Under Review	Submitted	Jan 29 2020 01:38 PM (UTC)	<a href="#">VIEW</a>
<input type="checkbox"/>	Community Fund Grant	8884159853	Under Review	Submitted	Jan 29 2020 03:41 PM (UTC)	<a href="#">VIEW</a>
<input type="checkbox"/>	Community Fund Grant	UWDOR	Mar 13 2020 09:00 PM (UTC)	1 of 10 required tasks complete	Jan 29 2020 03:09 PM (UTC)	<a href="#">CONTINUE</a>

# Click on ellipsis. Select download.



 Submitted  
Submitted on: Jan 29 2020 03:41 PM (UTC)

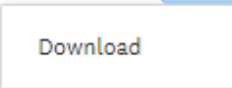
Community Fund Grant 

**8884159853**










ID: 8884159853    Status: Under Review

**APPLICATION**    ACTIVITY

 Preview    

 Download

## Previous tasks

	 Community Application Completed on: Jan 29 2020 01:48 PM (UTC)	
	 Output and Outcome Completed on: Jan 29 2020 01:49 PM (UTC)	
	 Program and Budget Completed on: Jan 29 2020 01:52 PM (UTC)	

**Questions?**

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

**Thank you**



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