

# Technical Guidance

Creating and Submitting an  
Application

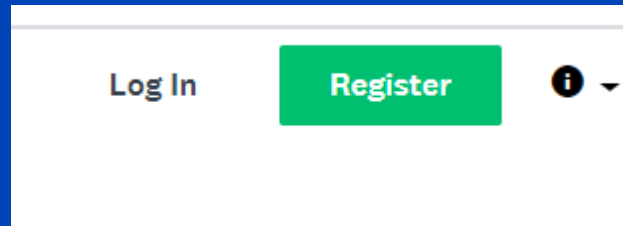


**UNITED WAY**  
Dutchess-  
Orange Region

**Website: <https://uwdor.smapply.io/>**

**For returning users:**

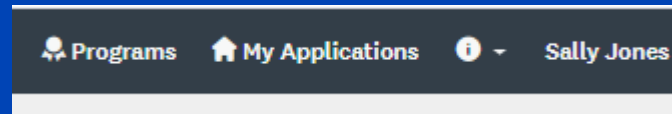
**In the top right corner on the website, click on Log In.**



# 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




Personal Info


---




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

Account Settings

 My Profile

 Notifications

 Eligibility >

Update your eligibility profile

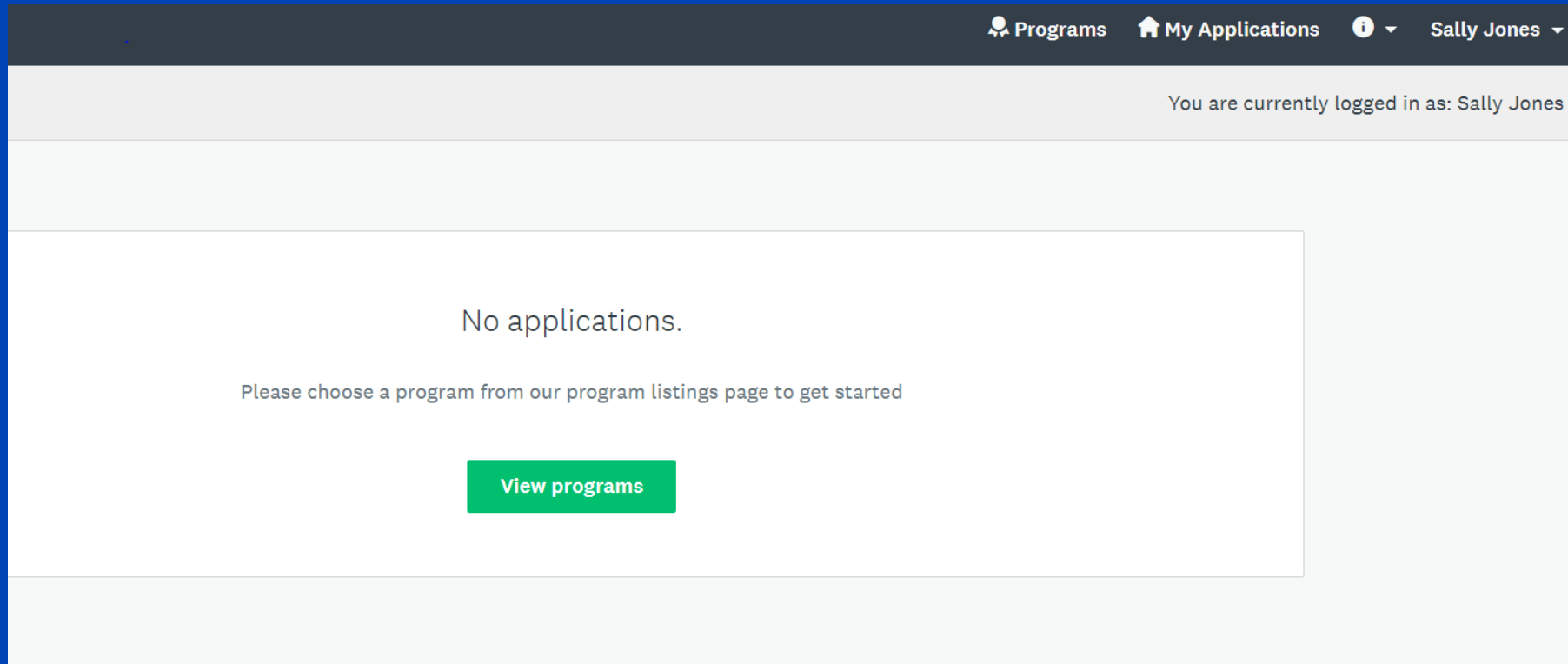
Agency Profile Form

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




**Returning users, click on “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 >**

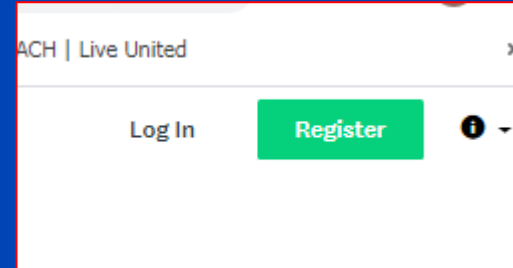


# New users:

**In the top right corner:**

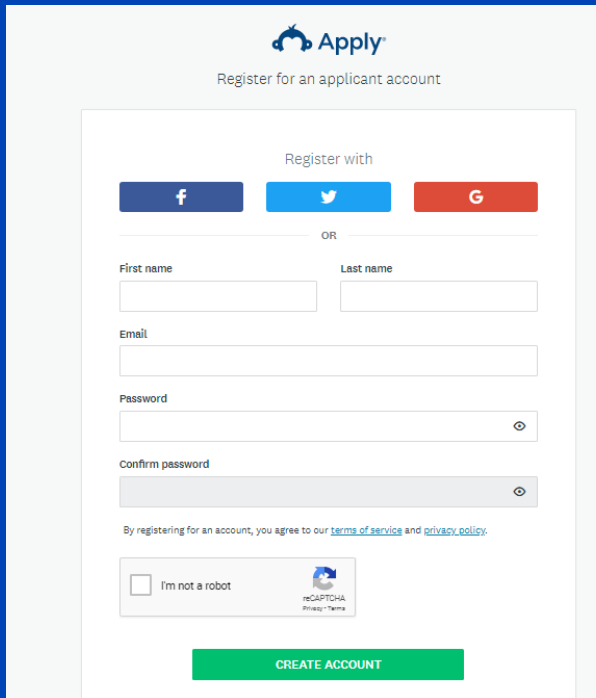
**Step 1:**

**Click on green button, “Register”**



**Step 2:**

**Follow instructions  
on creating an account.**

A screenshot of the 'Apply' registration form. The form is titled 'Apply' with a logo and the text 'Register for an applicant account'. It features a 'Register with' section with buttons for Facebook, Twitter, and Google. Below this is an 'OR' separator. The form includes input fields for 'First name', 'Last name', 'Email', 'Password', and 'Confirm password'. At the bottom, there is a checkbox for 'I'm not a robot' next to a reCAPTCHA logo, and a green 'CREATE ACCOUNT' button.

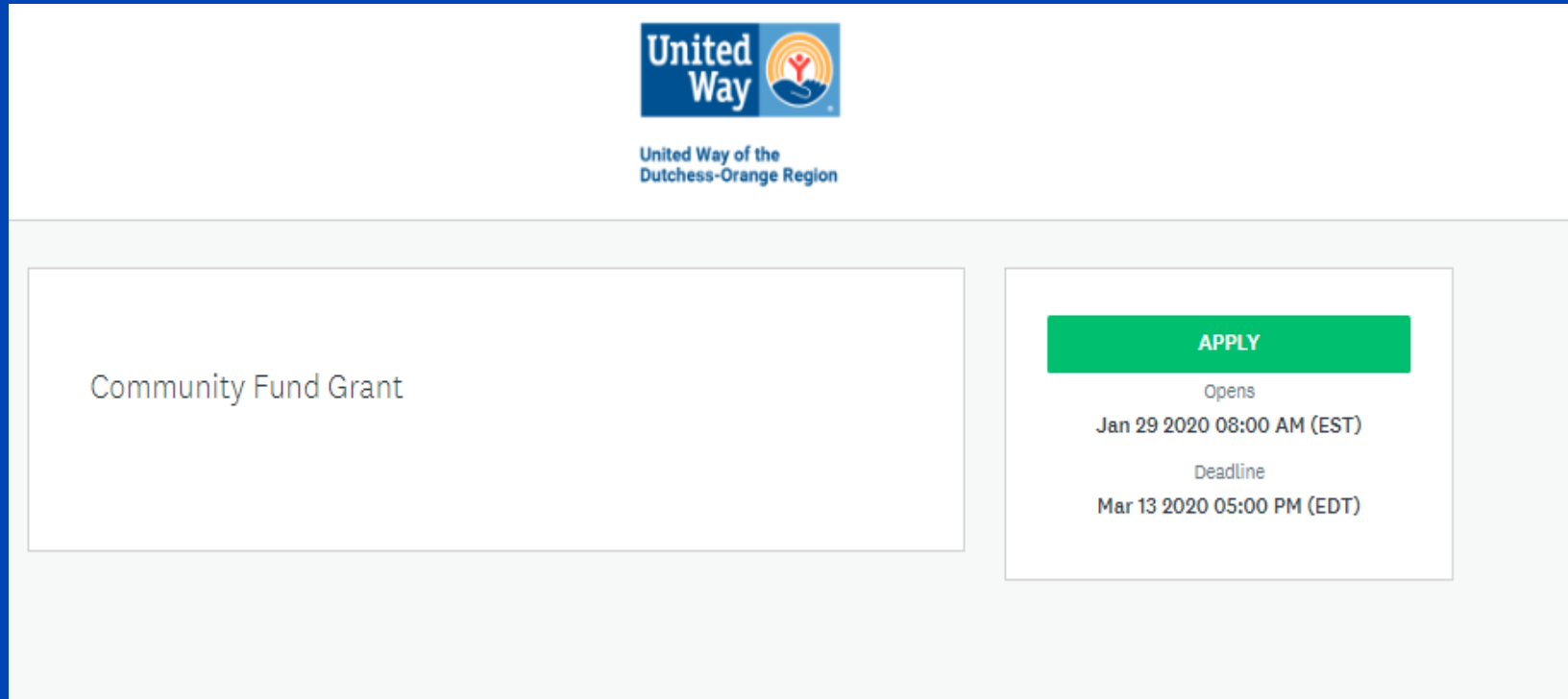
**Step 3:**

**An email will be sent with further  
instructions.**





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



**Click on the green button, “APPLY”.**



# Click on green button, “MORE”.

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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



**Click on green button, “CHECK ELIGIBILITY”.**



United Way of the  
Dutchess-Orange Region

Community Fund Grant

**CHECK ELIGIBILITY**

Opens  
Jan 29 2020 08:00 AM (EST)

Deadline  
Mar 13 2020 05:00 PM (EDT)

**Fill out the Agency Profile form and click on  
SAVE MY PROFILE**



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

**The application process requires the following forms 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:**

## **Documents to be uploaded:**

- IRS Tax Exempt/Letter of Determination/501(c)3 status**
- Organizational Financial Audit**
- IRS 990**
- Annual Report (if your agency completes 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”.**



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Dutchess-Orange Region

Community Fund Grant

6 Applications

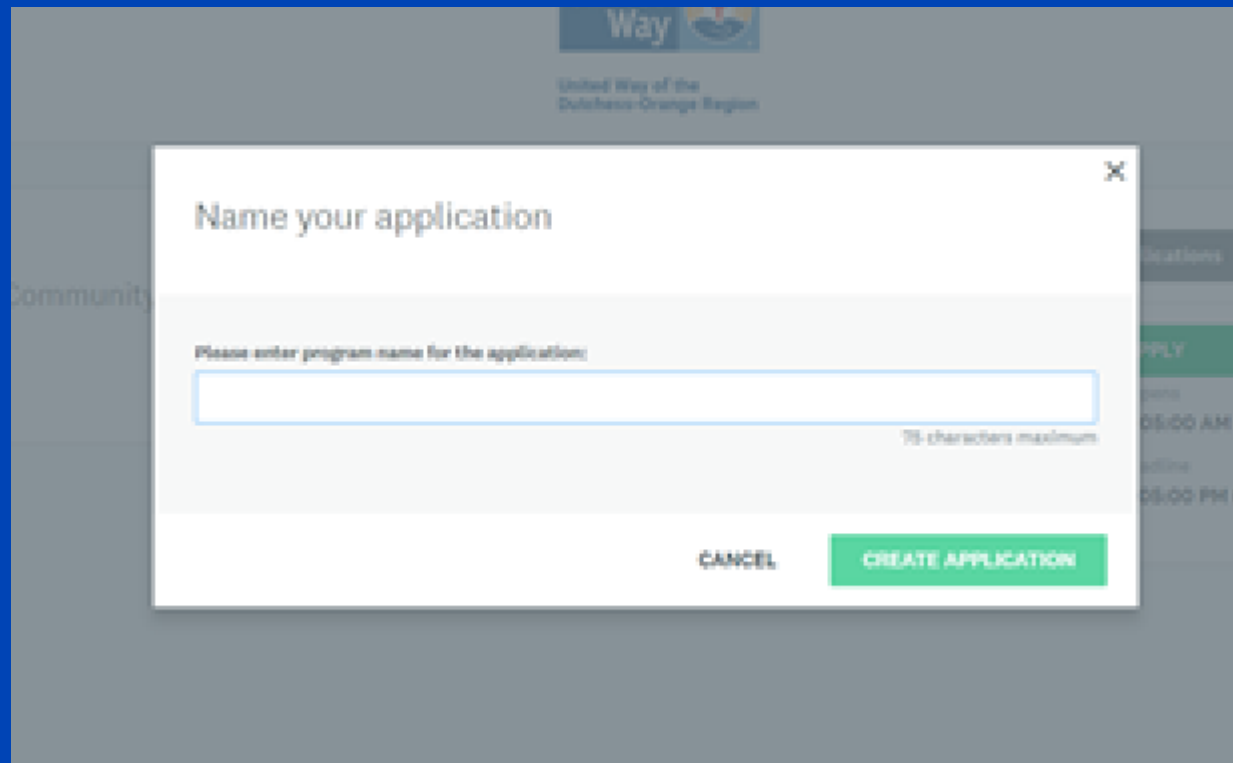
**APPLY**

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 with a modal dialog box titled "Name your application". The dialog box has a close button (X) in the top right corner. Inside the dialog, there is a text input field with the placeholder text "Please enter program name for the application:". Below the input field, it says "75 characters maximum". At the bottom of the dialog, there are two buttons: "CANCEL" and "CREATE APPLICATION". The background of the web application is slightly blurred, showing a header with the "Way" logo and "United Way of the Dutchess-Orange Region", and a sidebar with "Community" and "Locations" links. A table with "APPLY" buttons and dates is also visible in the background.

Way  
United Way of the  
Dutchess-Orange Region

Community

Locations

APPLY

05:00 AM (3)

05:00 PM (3)

Name your application

Please enter program name for the application:

75 characters maximum

CANCEL CREATE APPLICATION



**Required tasks are listed.**  
**As each task is completed, the application status on the left side will increase.**

Programs

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

REVIEW

SUBMIT

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

8884159853

ID: 8884159853

APPLICATION

ACTIVITY

Your tasks

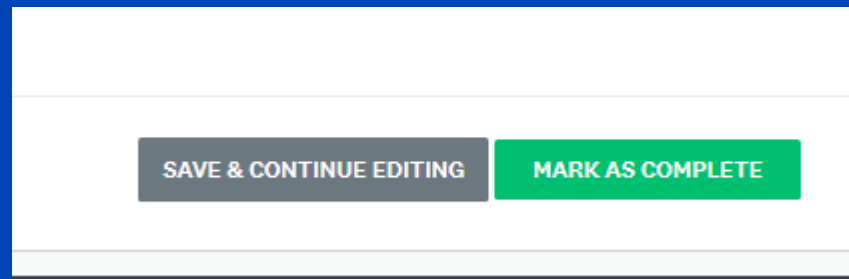
<input type="radio"/>	<input type="checkbox"/> Community Application 2019-2020 Cannot be modified	>
<input type="radio"/>	<input type="checkbox"/> <u>Output and Outcome 2019-2020</u> Cannot be modified	>
<input type="radio"/>	<input type="checkbox"/> Program and Budget 2019-2020 Cannot be modified	>
<input type="radio"/>	<input type="checkbox"/> Organizational Financial Audit/Financial Review 2019-2020 (optional) Cannot be modified	>
<input type="radio"/>	<input type="checkbox"/> Annual Report 2019-2020 (optional) Cannot be modified	>
<input type="radio"/>	<input type="checkbox"/> Memorandum of Understanding 2019-2020 (optional)	>





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

**As you finish each tasks/form, click on green button,  
“MARK AS COMPLETE”.**

A screenshot of a form's footer area. It features two buttons side-by-side. The left button is grey with the text "SAVE & CONTINUE EDITING" in white. The right button is green with the text "MARK AS COMPLETE" in white. The buttons are set against a light grey background with horizontal lines above and below them.

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

< Back to application

Community Fund Grant  
UWDOR  
ID: 9222518831

Community Application

Output and Outcome

Output and Outcome  
Completed Jan 29 2020 03:09 PM (UTC)

**2020-2021 Output and Outcome**

**Outcome Definitions:**

Outcome Statement(s): An outcome is a benefit and/or change for program participants program activities. Remember outcome statement must be measureable.

Outcome Indicator(s): What will you be measuring (specific items of information) that track the program's success and achievement of an outcome?

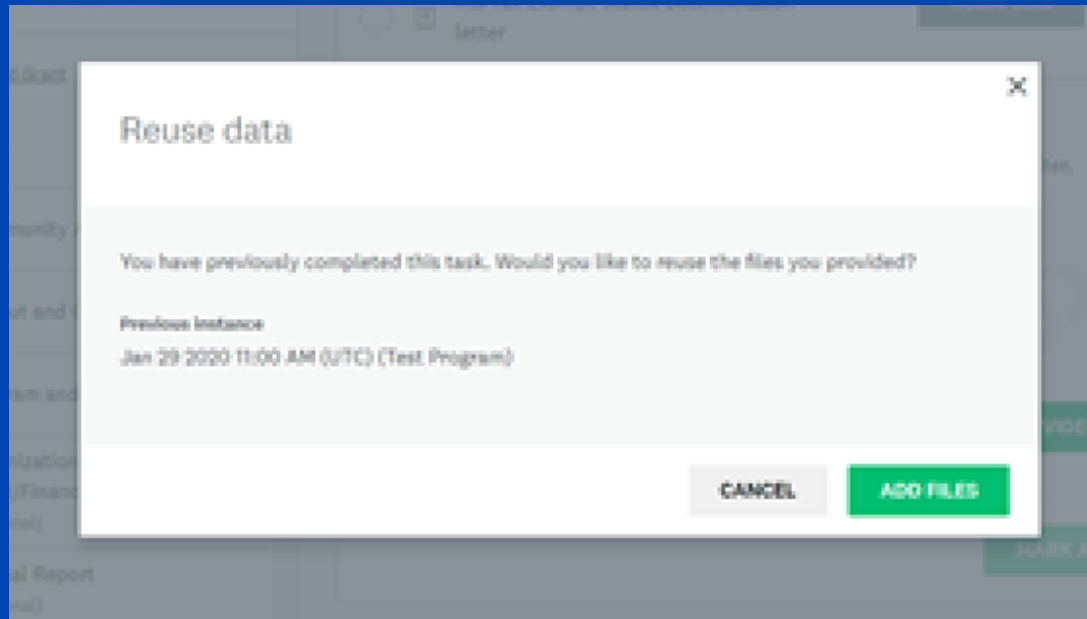
Targets: A numerical objective for a program's level of achievement on its outcomes.

**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.**

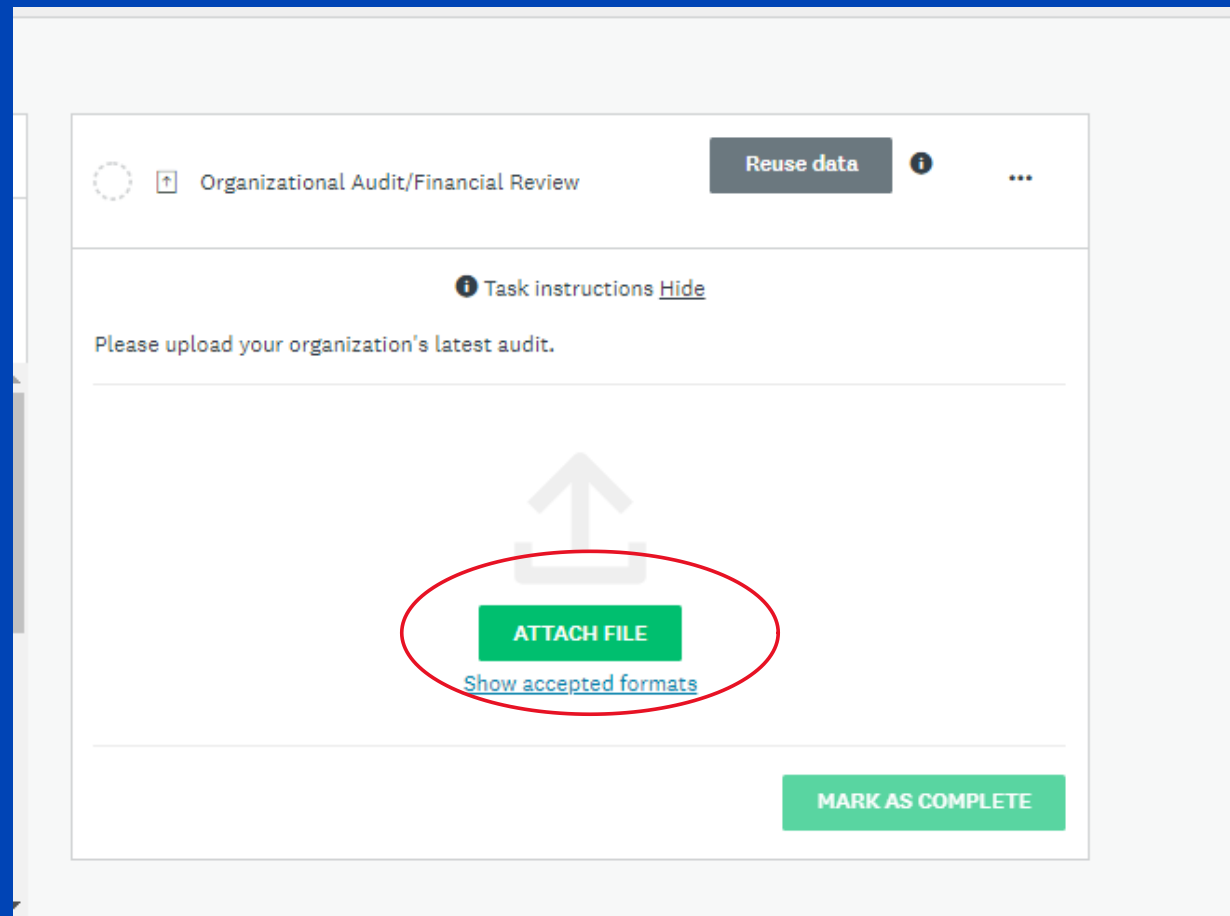


**If you want to reuse data, select which file and click ADD FILES. If not, select CANCEL.**

**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 interface for a task titled "Organizational Audit/Financial Review". At the top right, there is a "Reuse data" button and an information icon. Below the title, there is a section for "Task instructions" with a "Hide" link. The instructions state: "Please upload your organization's latest audit." Below this text is a large, light gray upload icon consisting of a square with an upward-pointing arrow. A red circle is drawn around a green button labeled "ATTACH FILE" located directly beneath the upload icon. Below the "ATTACH FILE" button is a link that says "Show accepted formats". 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”.

Memorandum of Understanding


Task instructions [Hide](#)

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



ATTACH FILE

[Show accepted formats](#)

 Mid Year Report Training

Filename: ning.pdf Added: Jan 29 2020

MARK AS COMPLETE



Back to application

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)

Memorandum  
Complete

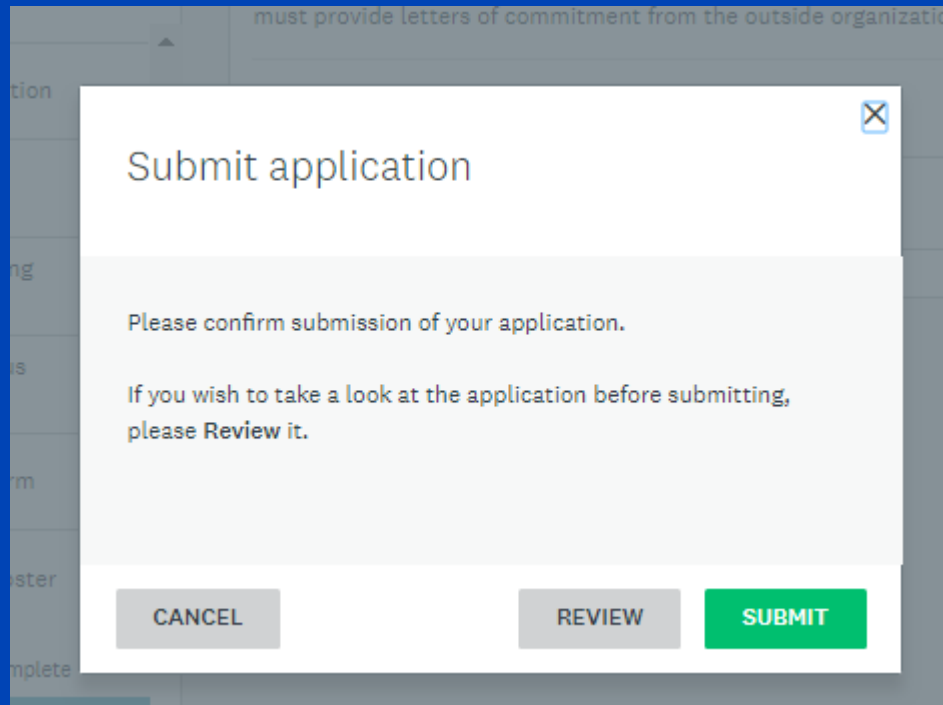
Programs that rely must provide letter

Mid Year  
Filename

**Once all 10 tasks have been completed, click on the green button, “SUBMIT”.**



# Final confirmation before Clicking on SUBMIT



A screenshot of a web application dialog box titled "Submit application". The dialog box is white with a blue close button in the top right corner. It contains the following text:

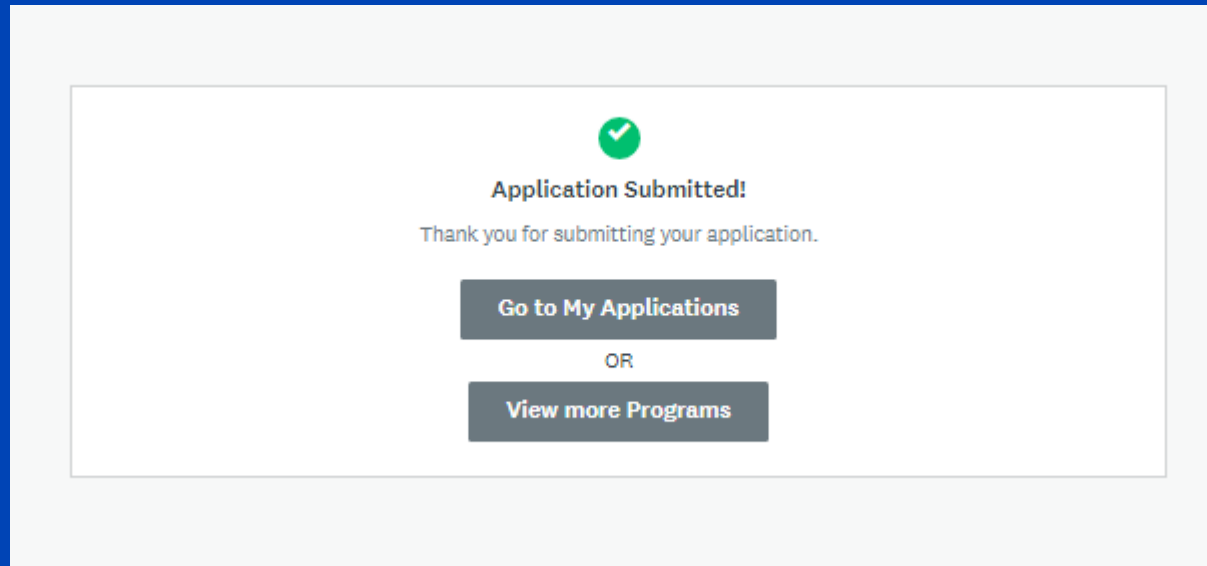
Please confirm submission of your application.

If you wish to take a look at the application before submitting, please Review it.

At the bottom of the dialog box, there are three buttons: "CANCEL" (grey), "REVIEW" (grey), and "SUBMIT" (green).



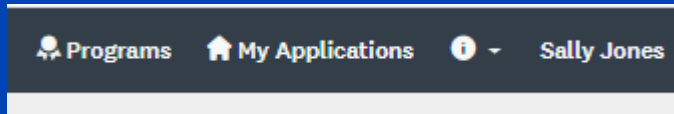
**A pop up message will show confirmation.  
An email will be sent to the user's email account.**





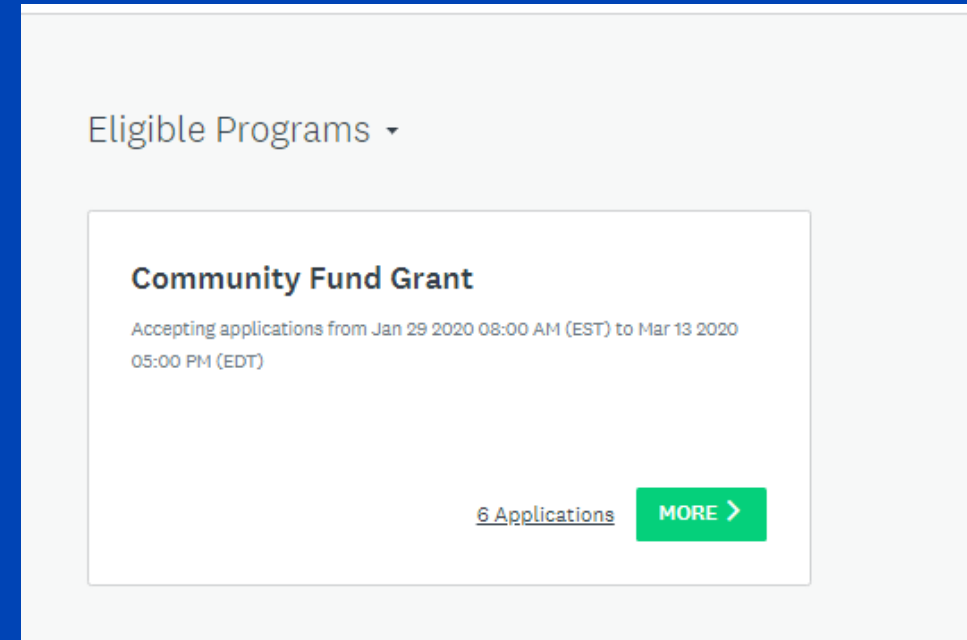
# If your agency would like to apply for another program:

## 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 29 2020 08:00 AM (EST)

Deadline

Mar 13 2020 05:00 PM (EDT)

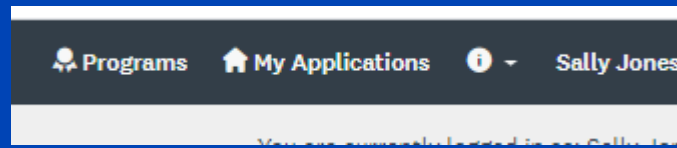


**Follow the same instructions to begin applying for an additional program.**



**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**

