Community Fund Grant Application Technical Assistance

United Way of the Dutchess-Orange Region
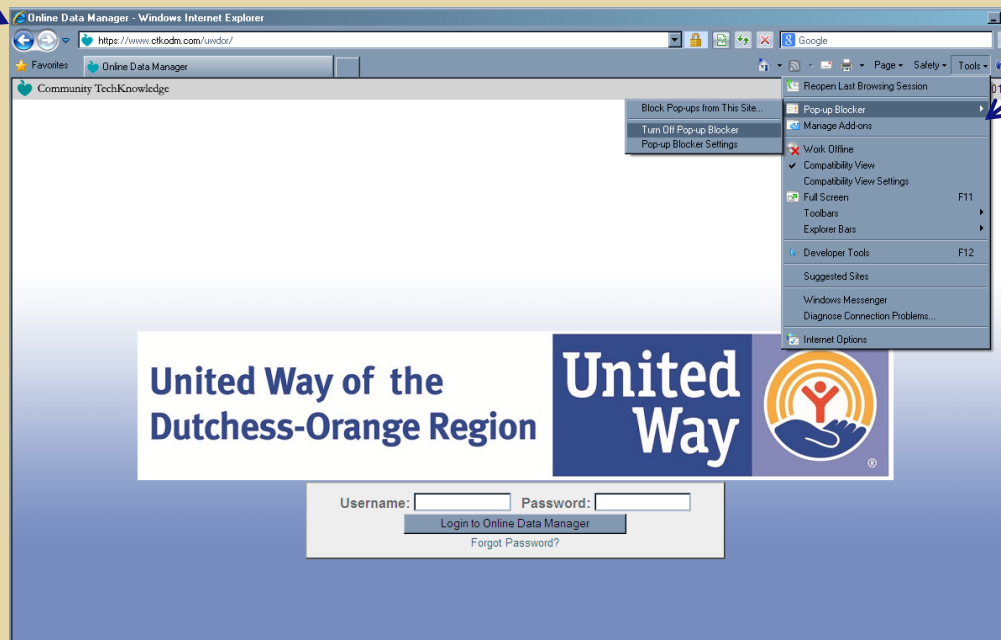
LIVE UNITED

United Way

Create an Application
New & Returning Users

Browsers Supported Include: IE9, IE10, IE11, Mozilla Firefox, and Google Chrome

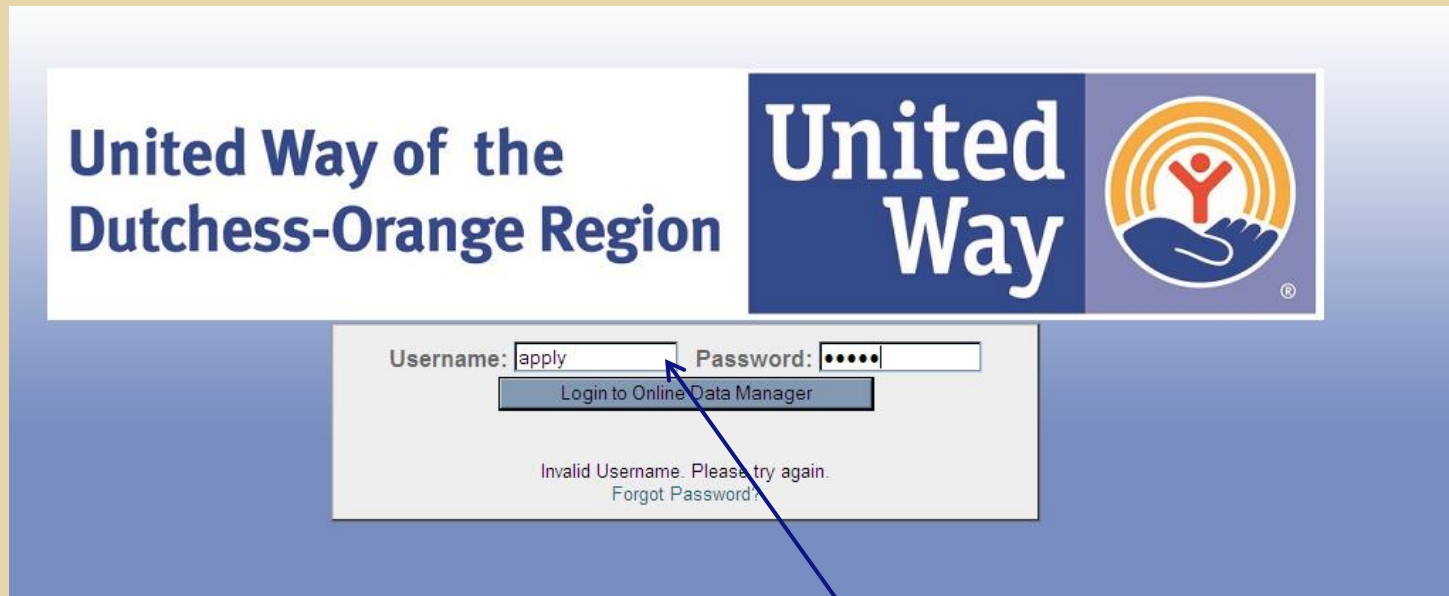Ensure Pop-up's are Enabled

Please sign into our eGranting Portal at www.ctkodm.com/uwdor

Create an Application
New & Returning Users

Enter "apply" as both username and password each time logging in during Application Period

Creating an Account
New Users, Only

Click "First Time Logging In" to create an Agency Profile
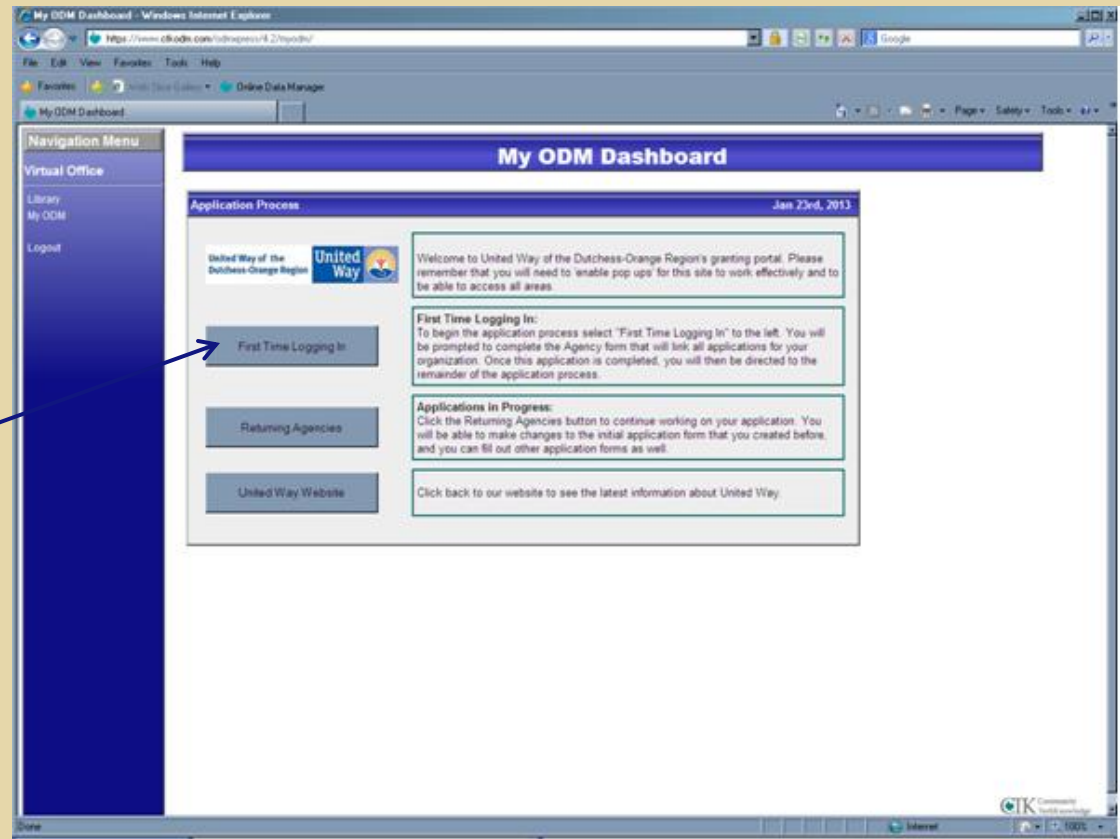
Creating an Account
New Users, Only

Enter Username, Password, and EIN #. Then click "Duplicate Check" to ensure your agency has not already registered with United Way

Agency Profile

Duplicate Check | Print | Save | Delete | New | Close

Administrative Info

Please create a **username** and **password** for your organization. *Write down your <u>password</u>, as it is **required** for future application access.*

| *Agency Username | |
| *Agency Password | |

NOTE: Username and Password fields are limited to 15 characters.

Agency Details

To make sure your organization is not already in the system, please enter your EIN. Now click the **Duplicate Check** button above; If the **Save** button becomes live, your organization is not yet in the system and you can continue the process. If your organization is already in the system a Pop-up box will appear. Please follow the instructions in the Pop-up box.
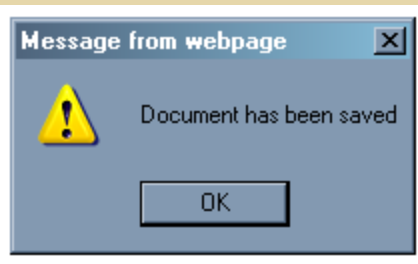
All fields with an Asterisk (*) before them are **required** fields and must be completed before you submit your grant request.

*Agency/Organization Name	
☐ *EIN	
Website	http://

Creating an Account
New Users, Only

Once the Duplicate Check is clicked, you will have the ability to Save your work and return to it at a later time. Once Saved, you will receive this notification:

Agency Profile   Print | Save | Delete | New | Close

Administrative Info

Please create a **username** and **password** for your organization. *Write down your password, as it is* **required** *for future application access.*

| *Agency Username | 2015Test |
| *Agency Password | 2015Test |

NOTE: Username and Password fields are limited to 15 characters.

Agency Details

To make sure your organization is not already in the system, please enter your EIN. Now click the **Duplicate Check** button above; If the **Save** button becomes live, your organization is not yet in the system and you can continue the process. If your organization is already in the system a Pop-up box will appear. Please follow the instructions in the Pop-up box.

All fields with an Asterisk (*) before them are **required** fields and must be completed before you submit your grant request.

*Agency/Organization Name	2015Test
*EIN	852741963
Website	http://

Message from webpage   ×

⚠ Document has been saved

OK

* Denotes a field that is required for submission. Applications will not be able to submitted until all required fields are complete.

United Way

Creating an Account
New Users, Only

2015Test Add to MyODM

- Create New -

Back to Search		
Application		
Scoring and Evaluation		
Reporting		
Basic Needs		
Attach Documents		

Existing Application Forms

View Application | Print Forms | View / Hide All

Agency Name	Website	City
2015Test	http://	Poughkeep

Grant Application

Status: **Not Yet Submitted**
Instructions
Print Application
Submit Application
View Doc Folder

Application Forms

Show All Forms
Agency Profile
Community Impact Application
Output and Outcome Data
Counterterrorism Compliance
Program Budget
Organization Information
Application Certification
Organization Required Documents Upload

All of the forms listed here must be completed for your Community Impact application to be submitted.

Once your agency profile has been created, it will bring you to this screen. Click "View Application".

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Creating an Application

Please Note: Green Check Mark indicates the form is complete

Click 'Show All Forms' to see the forms needed for submission

Grant Application
Status: **Not Yet Submitted**
Instructions
Print Application
Submit Application
View Doc Folder

Application Forms
Show All Forms
Agency Profile
Community Impact Application
Output and Outcome Data
Counterterrorism Compliance
Program Budget
Organization Information
Application Certification
Organization Required Documents Upload

All Application Forms

[Create New] [Browse]

Agency Profile
✔ Test 2016

Community Impact Application
✔ Test

Output and Outcome Data
You have not filled out this form.

Counterterrorism Compliance
You have not filled out this form.

Program Budget
You have not filled out this form.

Organization Information
You have not filled out this form.

Application Certification
You have not filled out this form.

Organization Required Documents Upload
You have not filled out this form.

Summary of Records Started

Please Note: Yellow Highlight indicates this form has not yet been started

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Application Requirements

Community Impact Application

(Multiple Applications are accepted.)
Each Program Application Requires:

1. Community Impact Application

2. Outputs & Outcome Data

3. Program Budget

In Addition

Each Agency must submit **one**:
1. Application Certification
2. Organization Required Document Upload
3. Counterterrorism Compliance
4. Organization Information

Creating an Application

Grant Application

Status: Not Yet Submitted
Instructions
Print Application
Submit Application
View Doc Folder

Application Forms

Show All Forms
Agency Profile
Community Impact Application
Output and Outcome Data
Counterterrorism Compliance
Program Budget
Organization Information
Application Certification
Organization Required Documents

All Application Forms

| Counterterrorism Compliance ▼ | Create New | Browse |

Agency Profile
✔ Test 2016

Community Impact Application
✔ Test

Output and Outcome Data
You have not filled out this form.

Counterterrorism Compliance
You have not filled out this form.

Program Budget
You have not filled out this form.

To create a form highlighted in Yellow, Select from the dropdown menu and click 'Create New'

Community Impact Application   Print | Save | Delete | New | Close

2015Test
Agency/Organization Name : *2015Test*
Street : *75 Market Street*   *(Agency Profile)*

Program Overview

Agency Name	
*Program Name	2015 Test
*Funding Cycle	2015-2016 ▼
*Program Description (400 char. limit).	2015 Test Program

This will bring you directly to the new form. In order to 'Save', all required fields must be completed (and can be edited later)

Creating an Application

Once Saved, forms will be viewable in the Agency Folder. To View additional forms , click 'View Application"
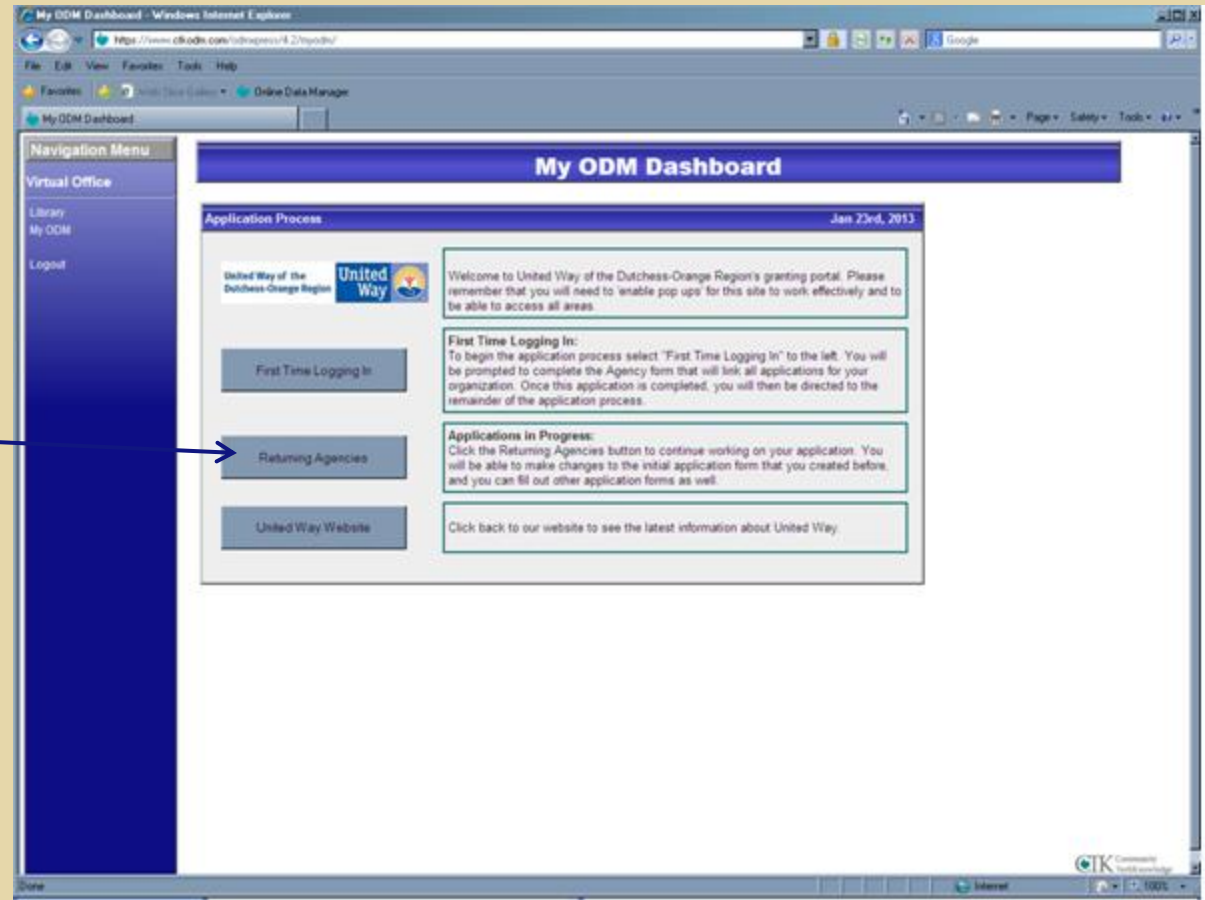

Once saved, you may log out and return to work on your application at any time.

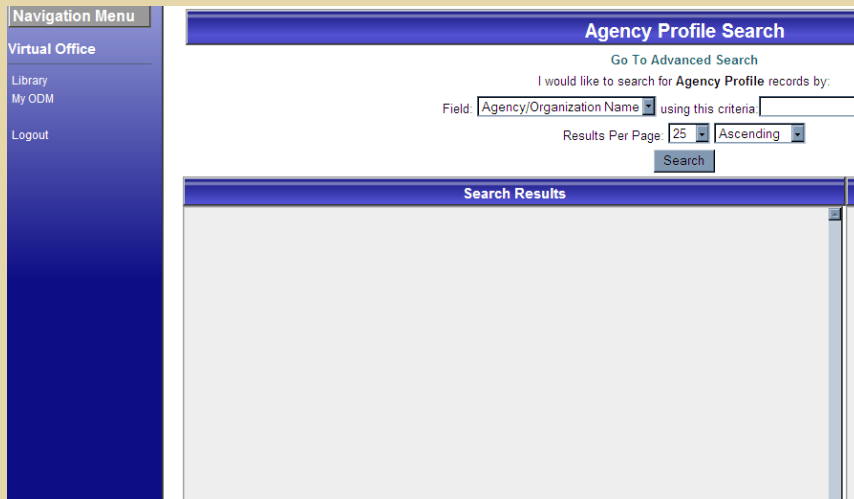# Accessing Agency Folder
Returning Agencies

Once you create an Agency Profile, you can save your work on the Application and return to it at a later time. To access your Agency folder, log in to the website using "**apply**" as both username and password, then clicking "Returning Agency".

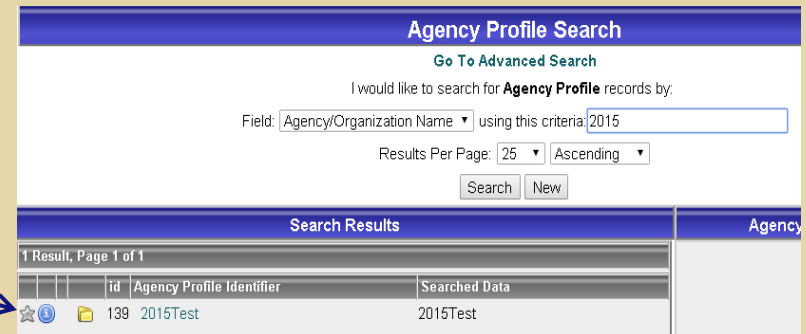**This includes last year's applicants.**

Accessing Agency Folder
Returning Agencies

To find your Agency Folder, enter your agency name in the search box and click "Search".

Once your agency link appears, click the folder icon to enter your Agency Folder

Returning Agencies

You will be prompted to enter the unique password that was created when the account was created.

Submit Application

Grant Application

Status: **Not Yet Submitted**

Instructions
Print Application
Submit Application

Application Forms

Show All Forms
Agency Profile
Holiday Helping Hand Application
Application Certification
Counterterrorism Compliance
Organization Required Documents Upload
Organization Information
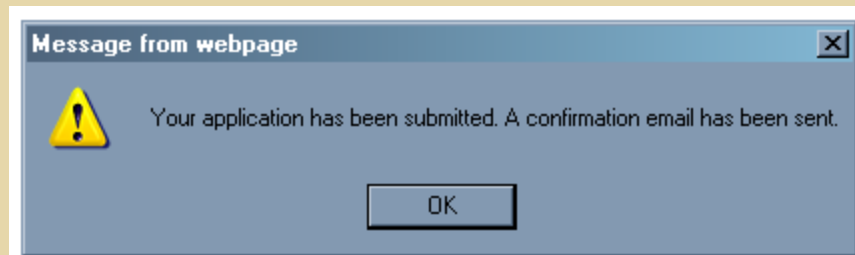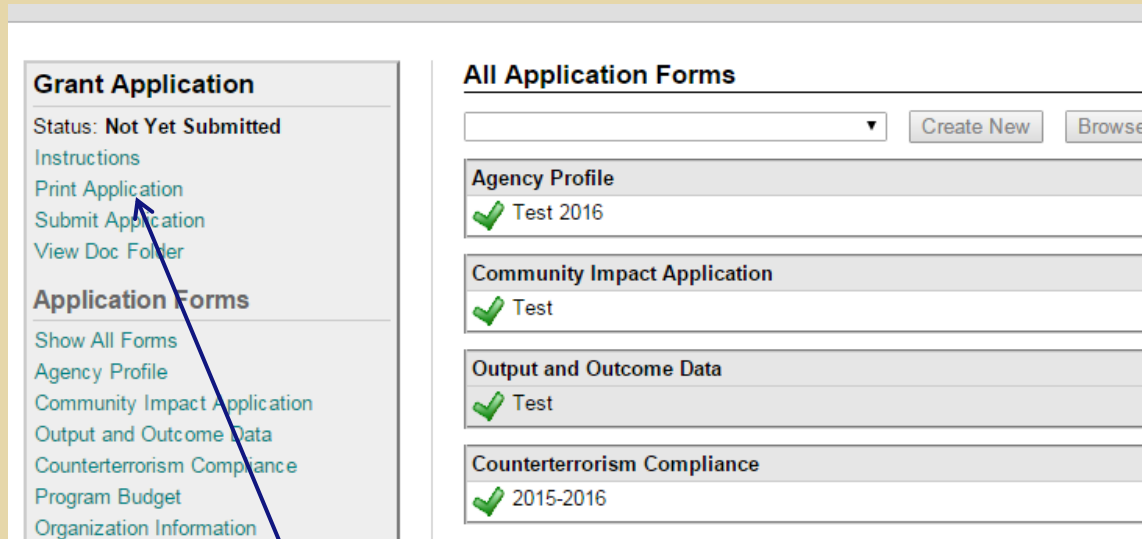
Once all forms are completed (indicated with green checkmark), click "Submit Application". Once the submission is complete, you will receive the following pop-up:

Message from webpage

⚠ Your application has been submitted. A confirmation email has been sent.

OK

United Way

Printing Application

Once your application has been submitted, you may not make edits to the application. However, we strongly suggest you print your application immediately to retain a copy for your records.

Printing Application

Print Manager

Please Select Your Format

- ● PDF
- ○ HTML

Choose Your Forms

Form Name	Program	Folder Name	Created Date	Created By	Modified Date	Modified By	☐
Agency Profile	--	2015Test	2015-01-27 09:43:00	Kimberly Kochem Administrator	2015-01-27 11:04:26	apply apply	☐
Community Impact Application	Application	2015 Test	2015-01-27 10:41:00	Kimberly Kochem Administrator			☐
Counterterrorism Compliance	Application	2014-2015	2015-01-27 11:01:00	apply apply			☐
Counterterrorism Compliance	Application	2014-2015	2015-01-27 11:04:00	apply apply			☐
Organization Required Documents Upload	Application	2014-2015	2015-01-27 11:02:00	apply apply			☐
Output and Outcome Data	Application	2015 Test	2015-01-27 11:04:00	apply apply			☐
Organization Information	Application	2014-2015	2015-01-27 11:05:00	apply apply			☐
Application Certification	Application	2015-2016	2015-01-27 10:48:00	Kimberly Kochem Administrator			☐

Section Spacing:

Print

Done

Please scroll to the bottom of the Print Manager screen to find the print button. Due to the high volume of applications, **United Way staff is not able to accommodate individual requests to print applications**.

United Way

Print Preview

AGENCY PROFILE

Administrative Info

Please create a username and password for your organization. Write down your password, as it is required for future application access.

Agency Username	2015Test
Agency Password	2015Test

NOTE: Username and Password fields are limited to 15 characters.

Agency Details

To make sure your organization is not already in the system, please enter your EIN. Now click the Duplicate Check button above; If the Save button becomes live, your organization is not yet in the system and you can continue the process. If your organization is already in the system a Pop-up box will appear. Please follow the instructions in the Pop-up box.

All fields with an Asterisk (*) before them are required fields and must be completed before you submit your grant request.

Agency/Organization Name	2015Test
EIN	852741963
Website	http://
Agency Address	

Your application has now been converted to a .pdf document to print or save.

United Way

You should receive the following confirmation email shortly after your application has been submitted. If you do not receive a confirmation email, please contact UW staff immediately via email to: ci-inbox@uwdor.org

From: Kimberly Kochem
To: kkochem@uwdor.org; ci-inbox@uwdor.org
Cc:
Subject: UWDOR Application Submitted

Dear 2015Test,

Thank you submitting your application for partnership to United Way of the Dutchess-Orange Region.

If you have any further questions, please submit them in writing to ci-inbox@uwdor.org

Yours in Community,

Kimberly Kochem, MPA
Vice President, Community Impact

Powered by CTK
Technology with a Heart
http://www.communitytech.net

Questions?

**Email us at:
ci-inbox@uwdor.org**