

# Community Fund Grant Application Technical Assistance

United Way of the Dutchess-Orange Region

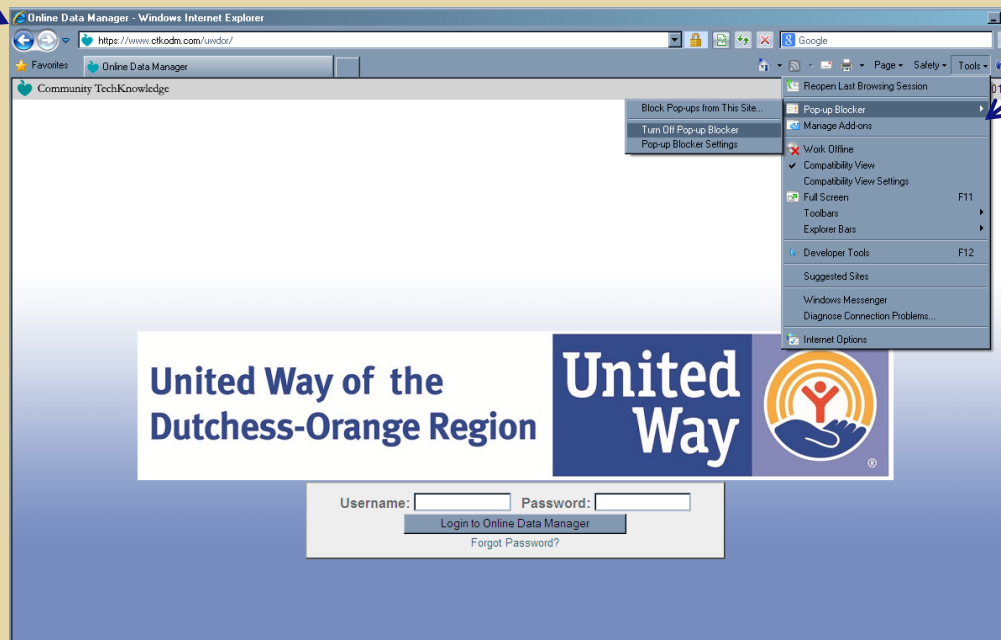


# Create an Application

## New & Returning Users

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

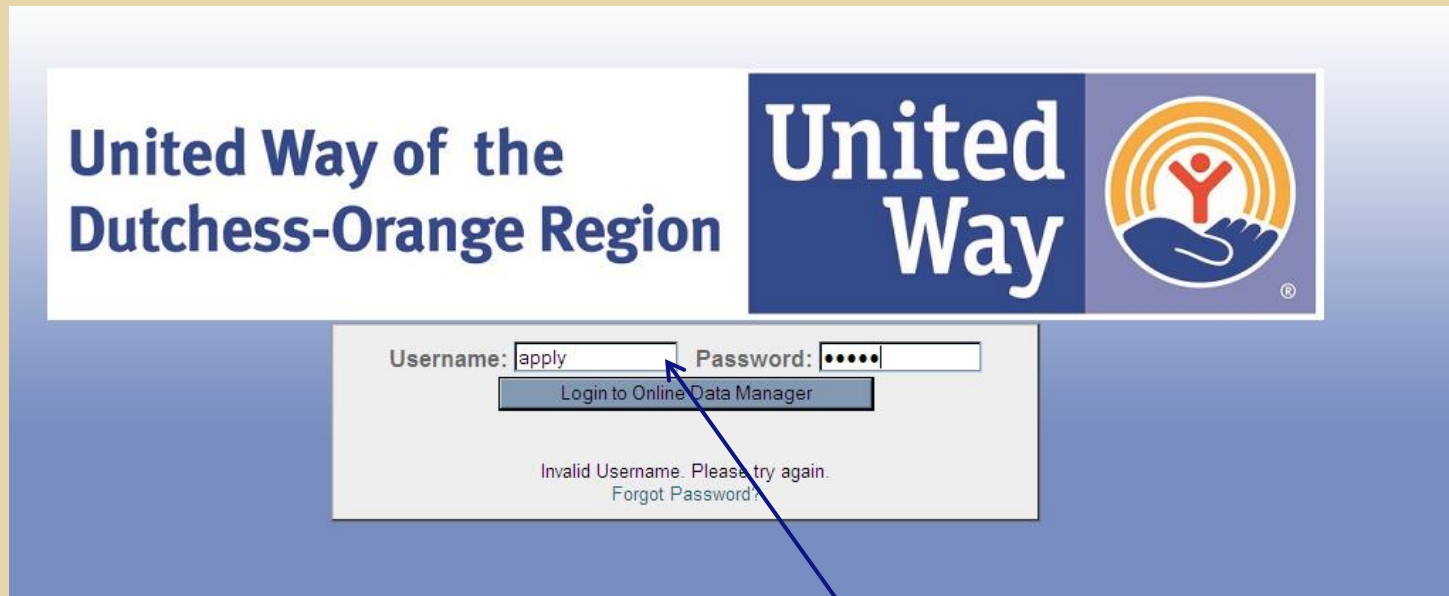
Ensure Pop-up's are Enabled



Please sign into our eGranting Portal at [www.ctlodm.com/uwdor](http://www.ctlodm.com/uwdor)

# Create an Application

*New & Returning Users*



United Way of the Dutchess-Orange Region

United Way

Username:  Password:

Login to Online Data Manager

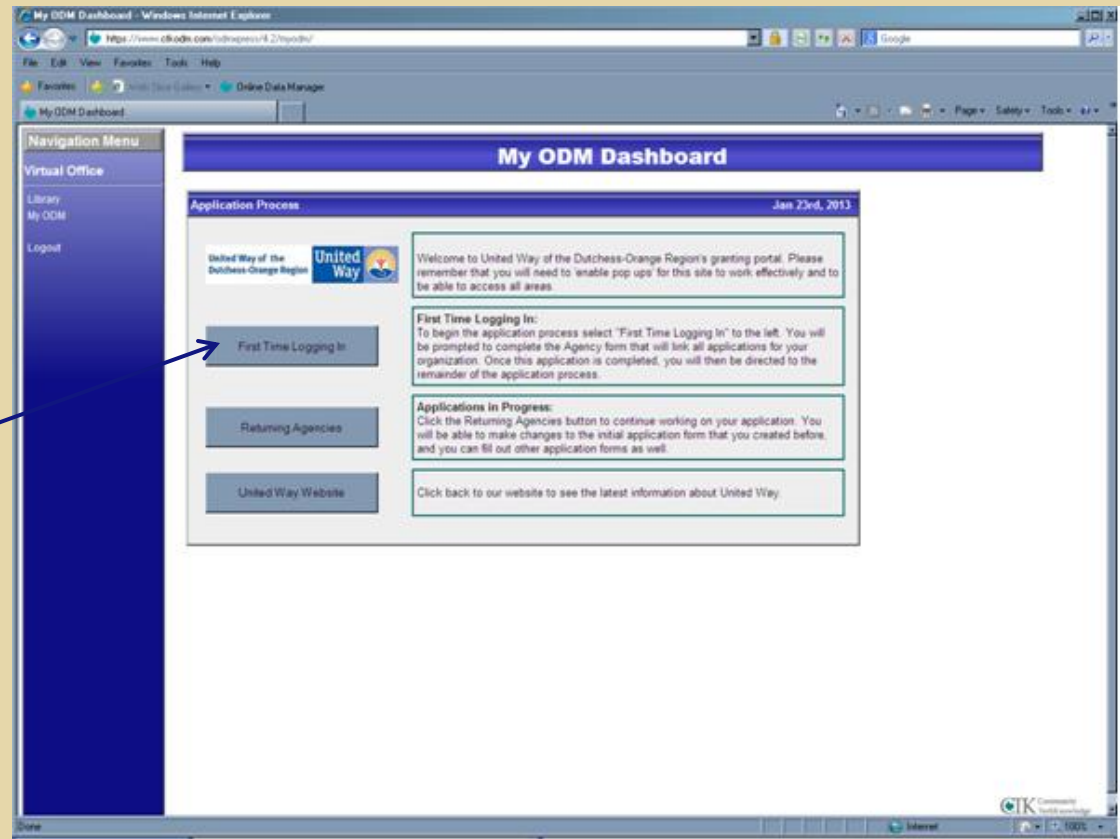
Invalid Username. Please try again.  
Forgot Password?

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 CheckPrintSaveDeleteNewClose

**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	<input type="text"/>
*Agency Password	<input type="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.

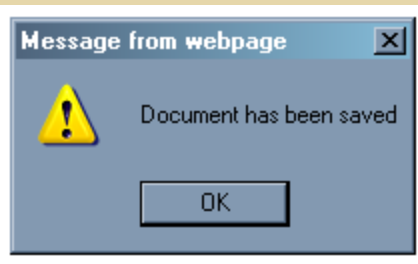
All fields with an Asterisk (\*) before them are **required** fields and must be completed before you submit your grant request.

*Agency/Organization Name	<input type="text"/>
 *EIN	<input type="text"/>
Website	<input type="text" value="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	852741983
Website	http://

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

# Creating an Account

## New Users, Only

2015Test Add to MyODM

- Create New -

**Existing Application Forms**

View Application Print Forms View / Hide All

Agency Name	Website	City
2015Test	http://	Poughkeeps

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

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

**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

# Creating an Application

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

The screenshot displays a web application interface for creating a grant application. On the left is a sidebar menu with two main sections: 'Grant Application' and 'Application Forms'. The 'Grant Application' section includes links for 'Status: Not Yet Submitted', 'Instructions', 'Print Application', 'Submit Application', and 'View Doc Folder'. The 'Application Forms' section includes links for 'Show All Forms', 'Agency Profile', 'Community Impact Application', 'Output and Outcome Data', 'Counterterrorism Compliance', 'Program Budget', 'Organization Information', 'Application Certification', and 'Organization Required Documents Upload'. An arrow points from the 'Show All Forms' link to the main content area. The main content area is titled 'All Application Forms' and features a dropdown menu, 'Create New', and 'Browse' buttons. Below these are several application form entries, each with a green checkmark icon and a title. The 'Agency Profile' form is titled 'Test 2016'. The 'Community Impact Application' form is titled 'Test'. The 'Output and Outcome Data' form is titled 'You have not filled out this form.' and is highlighted in yellow. The 'Counterterrorism Compliance' form is titled 'You have not filled out this form.' and is highlighted in yellow. The 'Program Budget' form is titled 'You have not filled out this form.' and is highlighted in yellow. The 'Organization Information' form is titled 'You have not filled out this form.' and is highlighted in yellow. The 'Application Certification' form is titled 'You have not filled out this form.' and is highlighted in yellow. The 'Organization Required Documents Upload' form is titled 'You have not filled out this form.' and is highlighted in yellow. At the bottom of the main content area is a section titled 'Summary of Records Started'.

Form Name	Status
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.

Please Note: Green Check Mark indicates the form is complete

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



# 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

**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'

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

**Community Impact Application**

2015Test

Agency/Organization Name : 2015Test

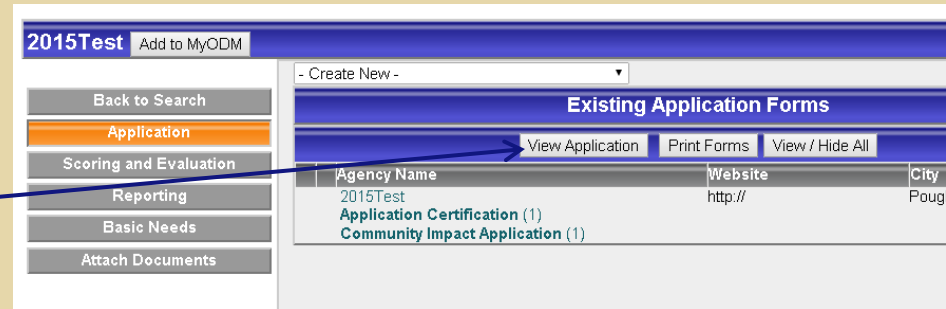
Street : 75 Market Street (Agency Profile)

**Program Overview**

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

# Creating an Application

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



The screenshot shows a web application interface. On the left is a sidebar with a header '2015Test' and a button 'Add to MyODM'. Below the header are several buttons: 'Back to Search', 'Application' (highlighted in orange), 'Scoring and Evaluation', 'Reporting', 'Basic Needs', and 'Attach Documents'. A blue arrow points from the 'View Application' button in the sidebar to the 'View Application' button in the main content area. The main content area has a header 'Existing Application Forms' and a table below it. The table has columns for 'Agency Name', 'Website', and 'City'. The first row shows '2015Test', 'http://', and 'Pough'. Below the table are two links: 'Application Certification (1)' and 'Community Impact Application (1)'. At the top of the main content area, there is a dropdown menu with '- Create New -' and three buttons: 'View Application', 'Print Forms', and 'View / Hide All'.

Agency Name	Website	City
2015Test	http://	Pough

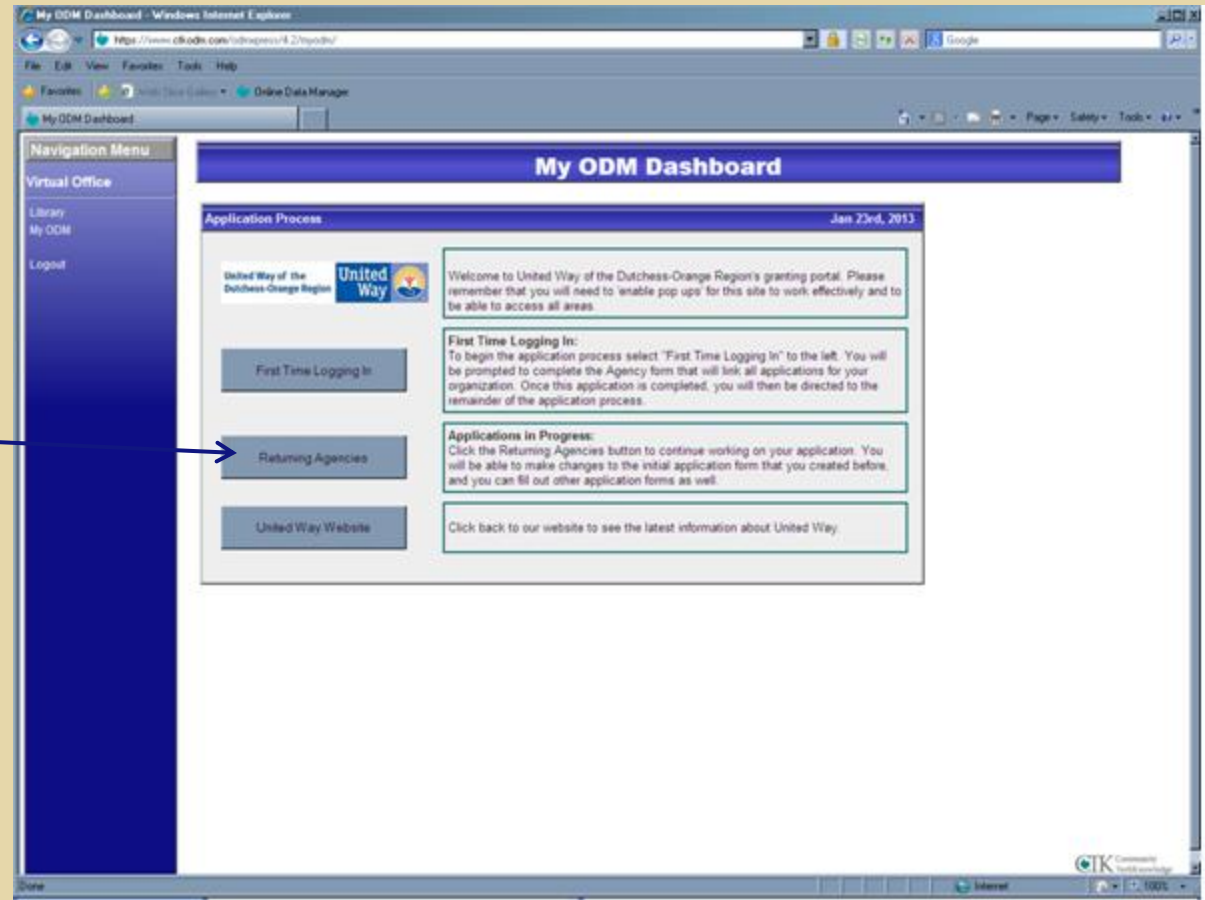
Once saved, you may log out and return to work on your application at any time.

# Accessing Agency Folder

## *Returning Agencies*

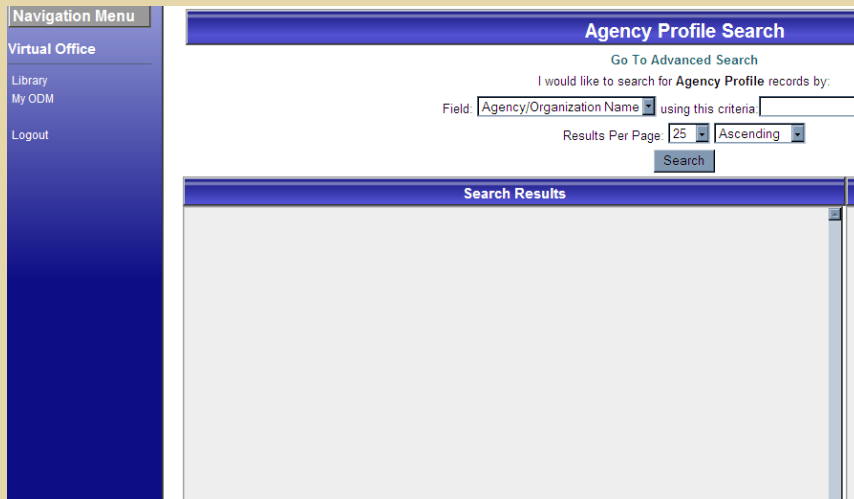
Once you create an Agency Profile, you can save your work on the Application and return to it at a later time. To access your Agency folder, log in to the website using “**apply**” as both username and password, then clicking “Returning Agency”.

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



# Accessing Agency Folder

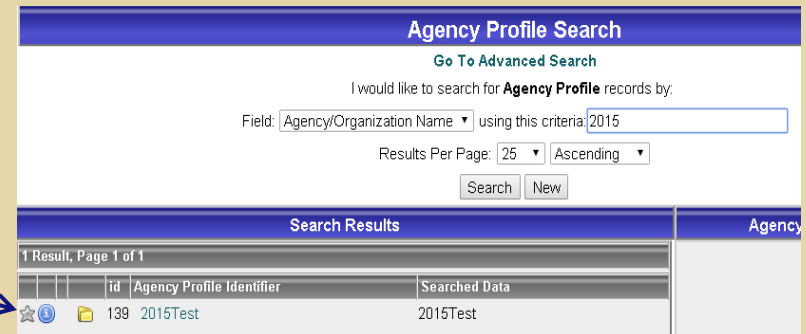
## Returning Agencies



The screenshot shows the 'Agency Profile Search' interface. On the left is a 'Navigation Menu' with links for 'Virtual Office', 'Library', 'My ODM', and 'Logout'. The main area has a header 'Agency Profile Search' and a sub-header 'Go To Advanced Search'. Below this, it says 'I would like to search for Agency Profile records by:'. There is a search field with a dropdown menu currently set to 'Agency/Organization Name'. To the right of the field are two dropdown menus for 'Results Per Page' (set to 25) and 'Ascending'. A 'Search' button is located below these fields. The 'Search Results' section below is currently empty.

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



This screenshot shows the same 'Agency Profile Search' interface, but with search results. The search field now contains '2015'. The 'Results Per Page' dropdown is set to 25, and the 'Ascending' dropdown is also set to Ascending. The 'Search' button is highlighted. Below the search bar, the 'Search Results' section shows '1 Result, Page 1 of 1'. A table displays the results:

id	Agency Profile Identifier	Searched Data
139	2015Test	2015Test

To the right of the table, there is a column labeled 'Agency'.

## Returning Agencies

The screenshot shows a web browser window with the URL <https://www.ctlkodm.com>. The page is titled "Grant Application Logon". It features a login form with the text "Login for: 2015Test" and "Tue, Jan 27, 2015". Below this is a "Password" input field and a "Submit" button. An arrow points from a text box below to the password field.

To the right of the login form is a search interface. It includes a "Go To Advanced Search" link, a search criteria field set to "Agency/Organization Name" with a value of "2015", and a "Search" button. Below the search bar is a "Search Results" section showing "1 of 1" results. The results are displayed in a table with two columns: "Agency Profile Identifier" and "Searched Data".

Agency Profile Identifier	Searched Data
139 2015Test	2015Test

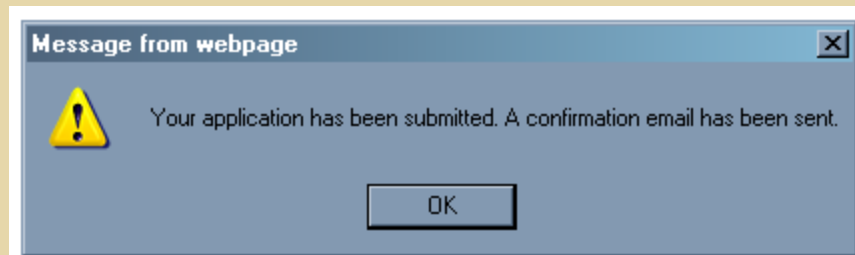
You will be prompted to enter the unique password that was created when the account was created.

# Submit Application

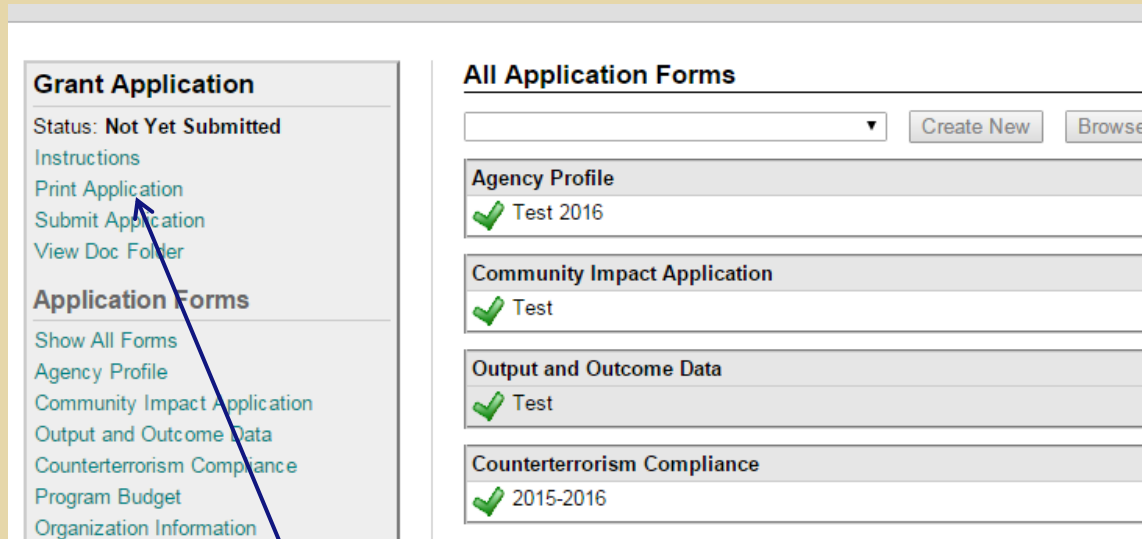
Once all forms are completed (indicated with green checkmark), click "Submit Application". Once the submission is complete, you will receive the following pop-up:



**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



# Printing 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

**All Application Forms**

**Agency Profile**

✓ Test 2016

**Community Impact Application**

✓ Test

**Output and Outcome Data**

✓ Test

**Counterterrorism Compliance**

✓ 2015-2016

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	<input type="checkbox"/>
Agency Profile	--	2015Test	2015-01-27 09:43:00	Kimberly Kochem Administrator	2015-01-27 11:04:26	apply apply	<input type="checkbox"/>
Community Impact Application	Application	2015 Test	2015-01-27 10:41:00	Kimberly Kochem Administrator			<input type="checkbox"/>
Counterterrorism Compliance	Application	2014-2015	2015-01-27 11:01:00	apply apply			<input type="checkbox"/>
Counterterrorism Compliance	Application	2014-2015	2015-01-27 11:04:00	apply apply			<input type="checkbox"/>
Organization Required Documents Upload	Application	2014-2015	2015-01-27 11:02:00	apply apply			<input type="checkbox"/>
Output and Outcome Data	Application	2015 Test	2015-01-27 11:04:00	apply apply			<input type="checkbox"/>
Organization Information	Application	2014-2015	2015-01-27 11:05:00	apply apply			<input type="checkbox"/>
Application Certification	Application	2015-2016	2015-01-27 10:48:00	Kimberly Kochem Administrator			<input type="checkbox"/>

Section Spacing:

Print

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.**

# 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.

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](mailto:ci-inbox@uwdor.org)

From: Kimberly Kochem  
To: [kkochem@uwdor.org](mailto:kkochem@uwdor.org); [ci-inbox@uwdor.org](mailto: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](mailto:ci-inbox@uwdor.org)

Yours in Community,

Kimberly Kochem, MPA  
Vice President, Community Impact

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Technology with a Heart  
<http://www.communitytech.net>

# Questions?

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