

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

Community Fund

Updated: January 2022

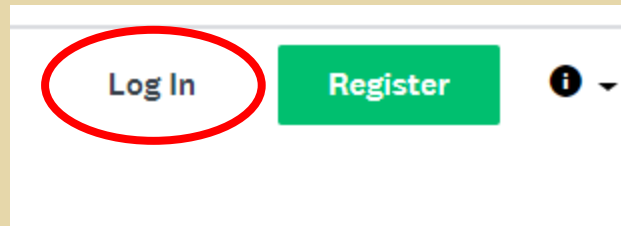


**United Way of the
Dutchess-Orange Region**

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

For returning users:

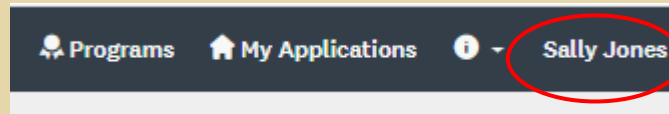
In the top right corner on the website, click on Log In.



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



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 >

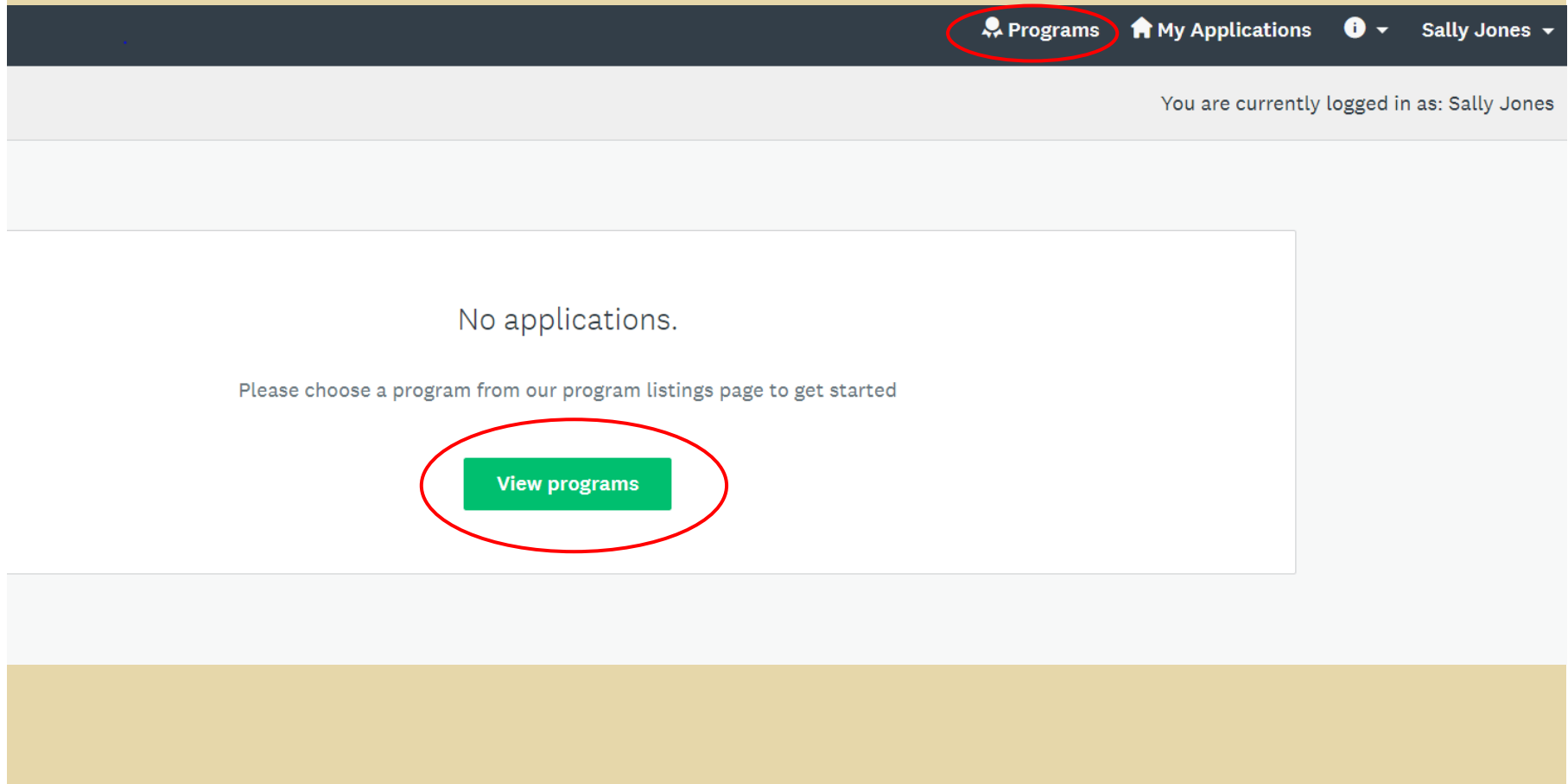
Update your eligibility profile

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)

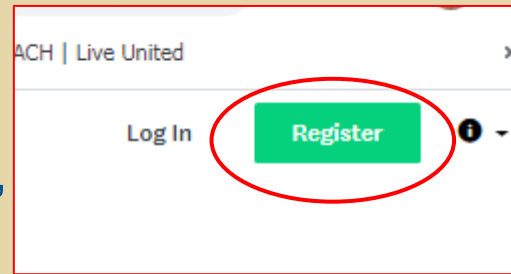
MORE >

New users:

In the top right corner:

Step 1:

Click on green button, “Register”

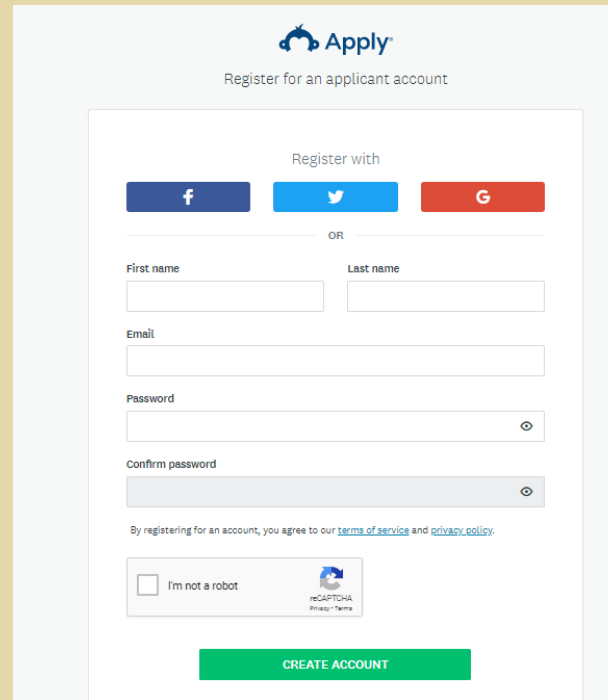


Step 2:

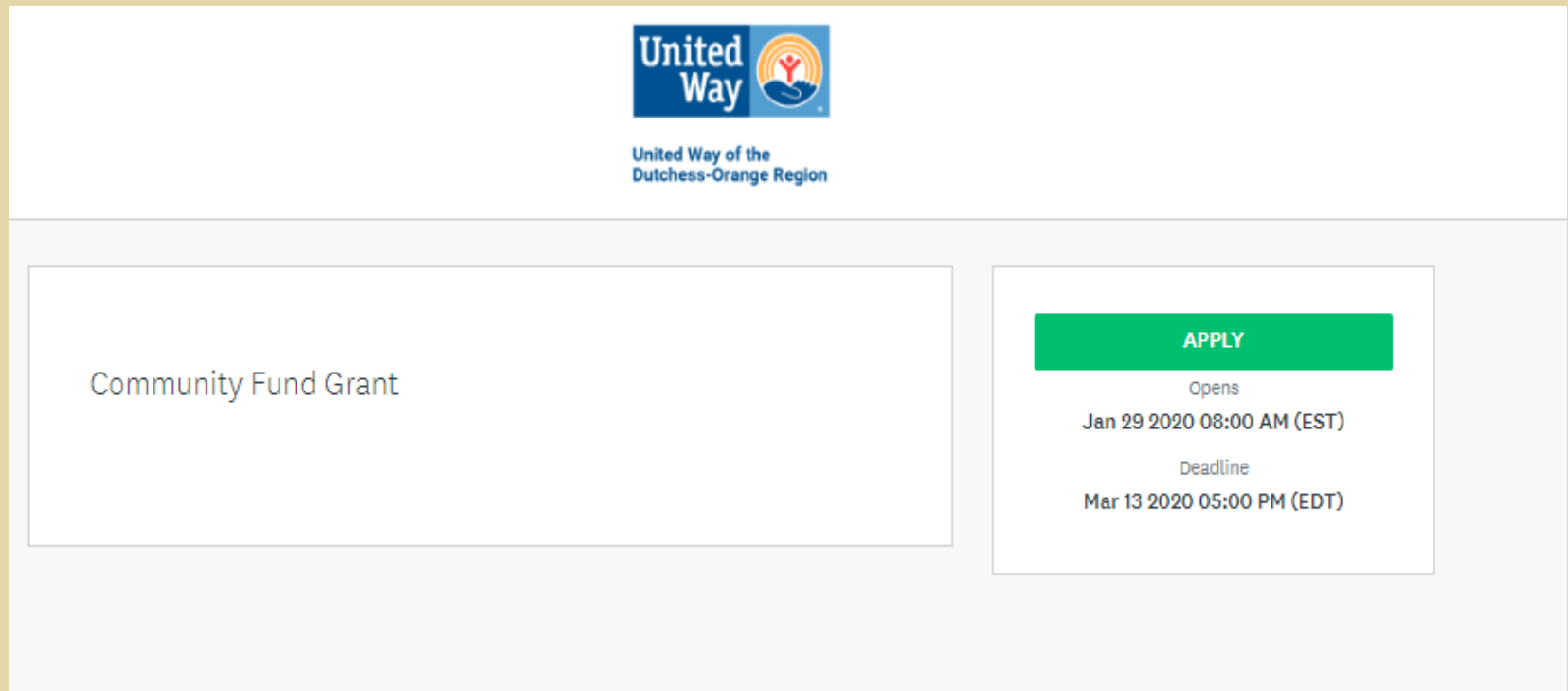
Follow instructions
on creating an account.

Step 3:

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

A screenshot of the 'Apply' registration form. At the top, the 'Apply' logo is displayed, followed by the text 'Register for an applicant account'. Below this, there are three social media login buttons: Facebook (f), Twitter (bird), and Google (G). A horizontal line with the word 'OR' in the center separates these from the standard registration fields. The fields include 'First name' and 'Last name' (two separate input boxes), 'Email' (one input box), 'Password' (one input box with an eye icon for toggling visibility), and 'Confirm password' (one input box with an eye icon). Below the password fields, there is a line of text: 'By registering for an account, you agree to our [terms of service](#) and [privacy policy](#).' Underneath this is a checkbox labeled 'I'm not a robot' next to a reCAPTCHA logo and the text 'reCAPTCHA Privacy - Terms'. At the bottom of the form is a large green button labeled 'CREATE ACCOUNT'.

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:

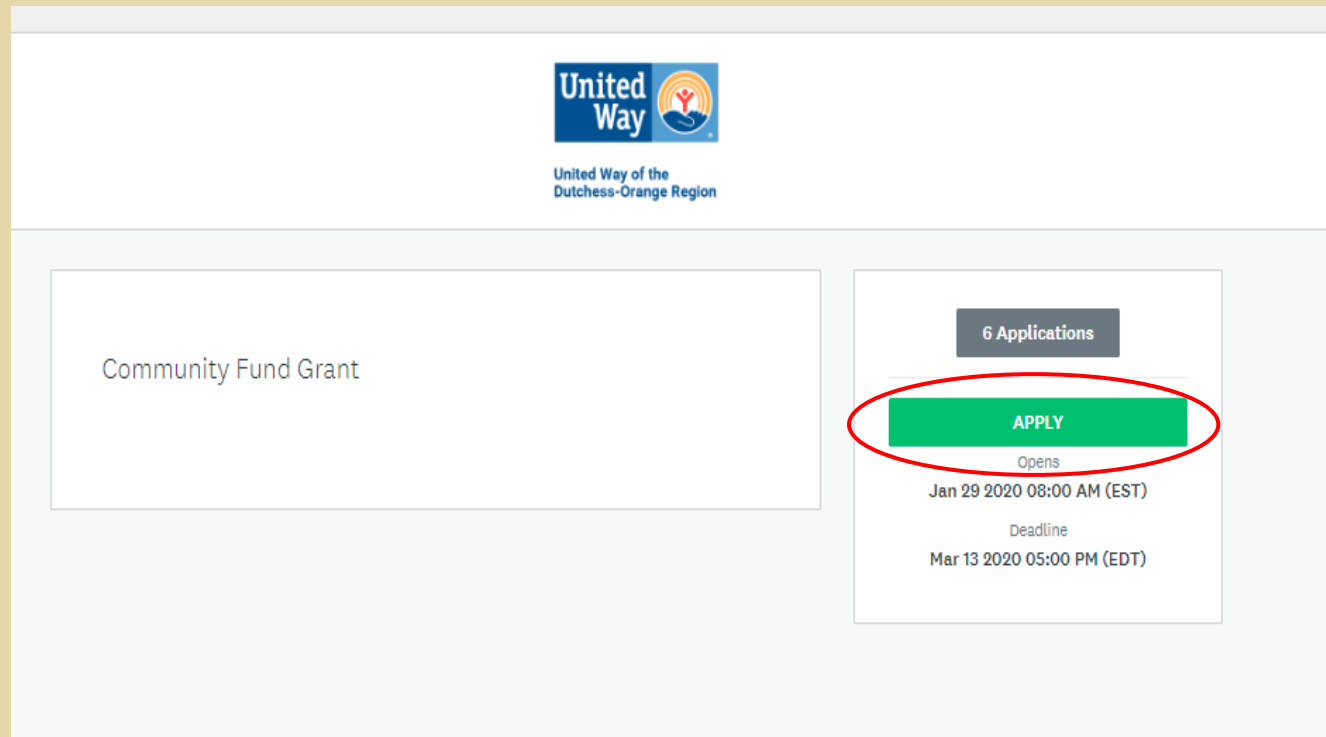
- Community Application
- Output and Outcome
- Program Budget
- Application Certification
- Organizational Information
- Counter Terrorism Compliance

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”.



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Community Fund Grant

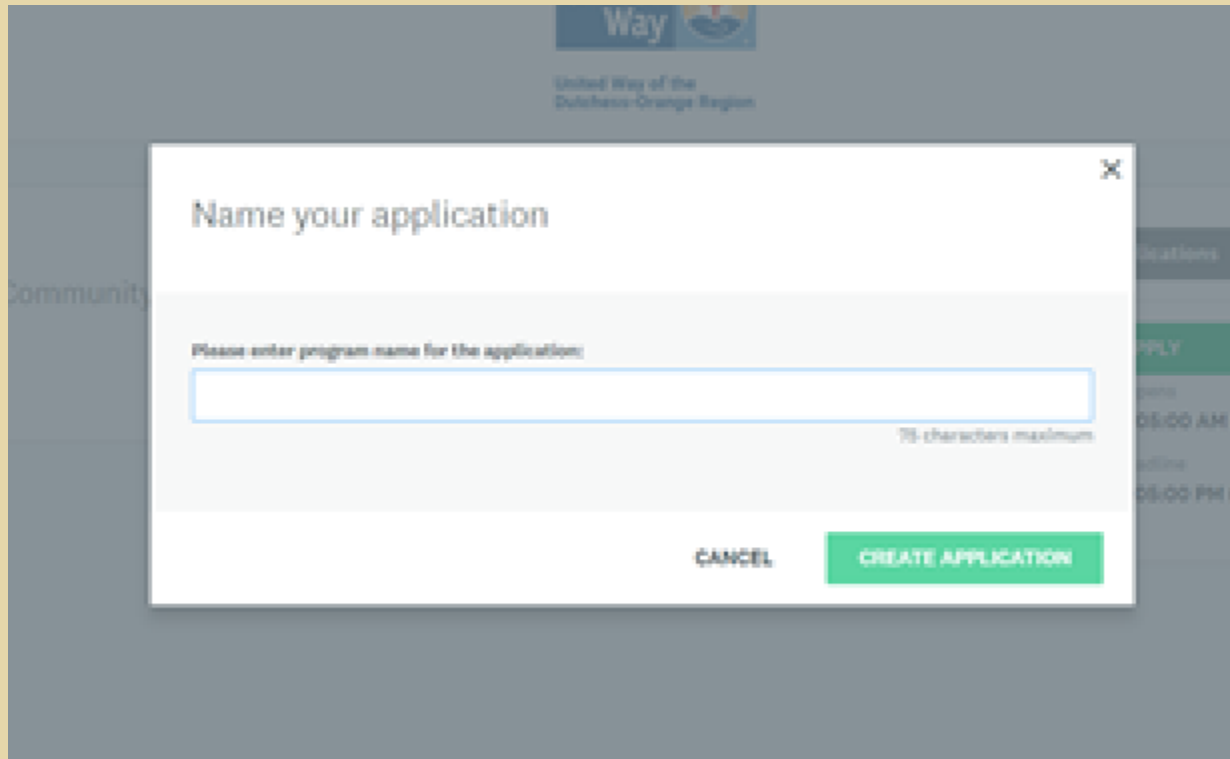
6 Applications

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 with a modal dialog box in the center. The dialog has a title bar with a close button (X) in the top right corner. The title of the dialog is "Name your application". Below the title, there is a text prompt: "Please enter program name for the application:". Underneath the prompt is a text input field. To the right of the input field, there is a small text label: "75 characters maximum". At the bottom of the dialog, there are two buttons: a "CANCEL" button on the left and a green "CREATE APPLICATION" button on the right. The background of the web application is a dark grey/blue color. At the top of the background, there is a logo for "United Way of the Dutchess-Orange Region". On the left side of the background, the word "Community" is partially visible. On the right side, there are some partially visible text elements like "Locations", "PLY", "05:00 AM (3", "edline", and "05:00 PM (3".

Listed are the tasks that need to be completed. As you go through each task, the completion 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

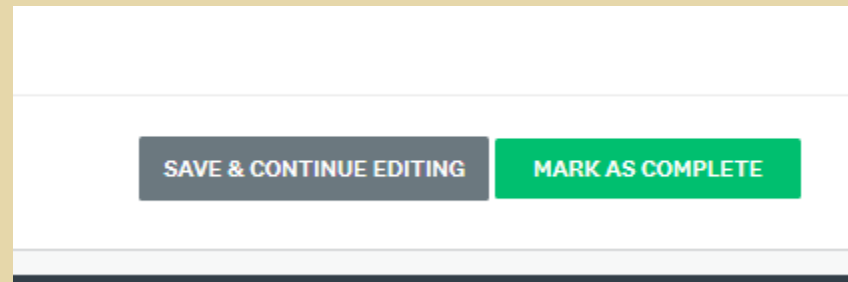
ACTIVITY

Your tasks

	 Community Application 2019-2020 Cannot be modified	>
	 <u>Output and Outcome 2019-2020</u> <u>Cannot be modified</u>	>
	 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”.

A screenshot of the bottom section of a form. It features two buttons side-by-side. The left button is dark 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 white background with a thin grey border above and below them.

The task will now show that it is complete.

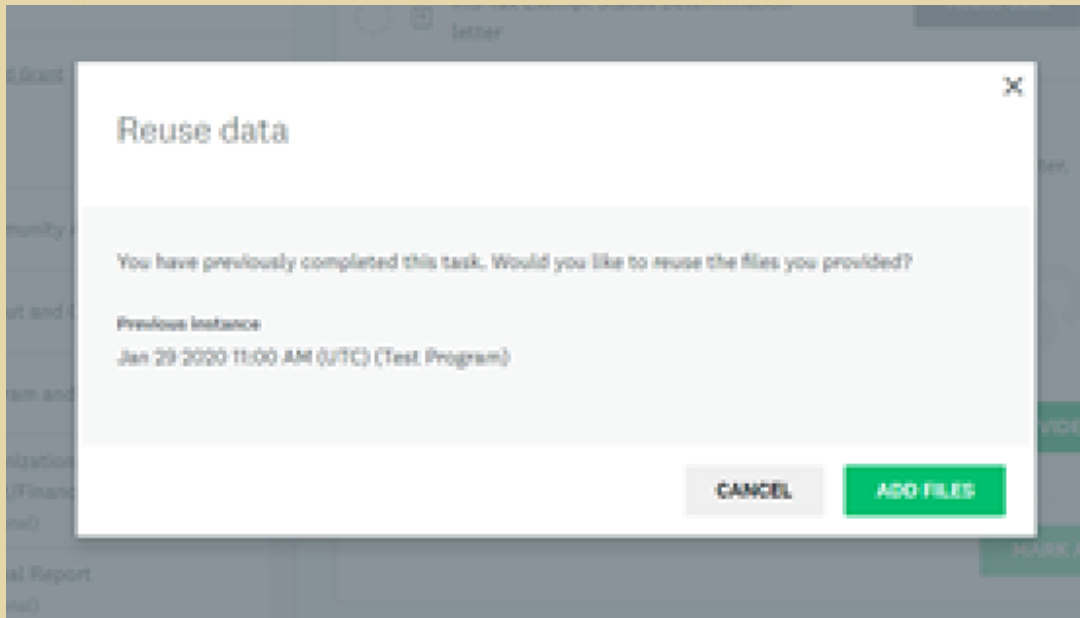
Once a form is marked as complete, your screen will look like this:

The screenshot displays a web interface with a sidebar on the left and a main content area on the right. The sidebar contains a 'Back to application' link at the top, followed by a section for 'Community Fund Grant' with 'UWDOR' and 'ID: 9222518831'. Below this is a list of tasks: 'Community Application' (marked with a dashed circle icon) and 'Output and Outcome' (marked with a green checkmark icon). A blue arrow points from the text 'Shows that task is complete.' to the green checkmark icon. The main content area shows a green checkmark icon and the title 'Output and Outcome' with the completion date 'Completed Jan 29 2020 03:09 PM (UTC)'. Below this is a section titled '2020-2021 Output and Outcome' with sub-sections for 'Outcome Definitions:', 'Outcome Statement(s):', 'Outcome Indicator(s):', and 'Targets:'. A red circle highlights an ellipsis menu icon in the top right corner of the main content area. A red arrow points from the text 'Click on ellipsis: download, reset or to edit the form' to this icon. The ellipsis menu is open, showing options: 'Download', 'Reset', and 'Edit'.

Shows that
task is
complete.

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

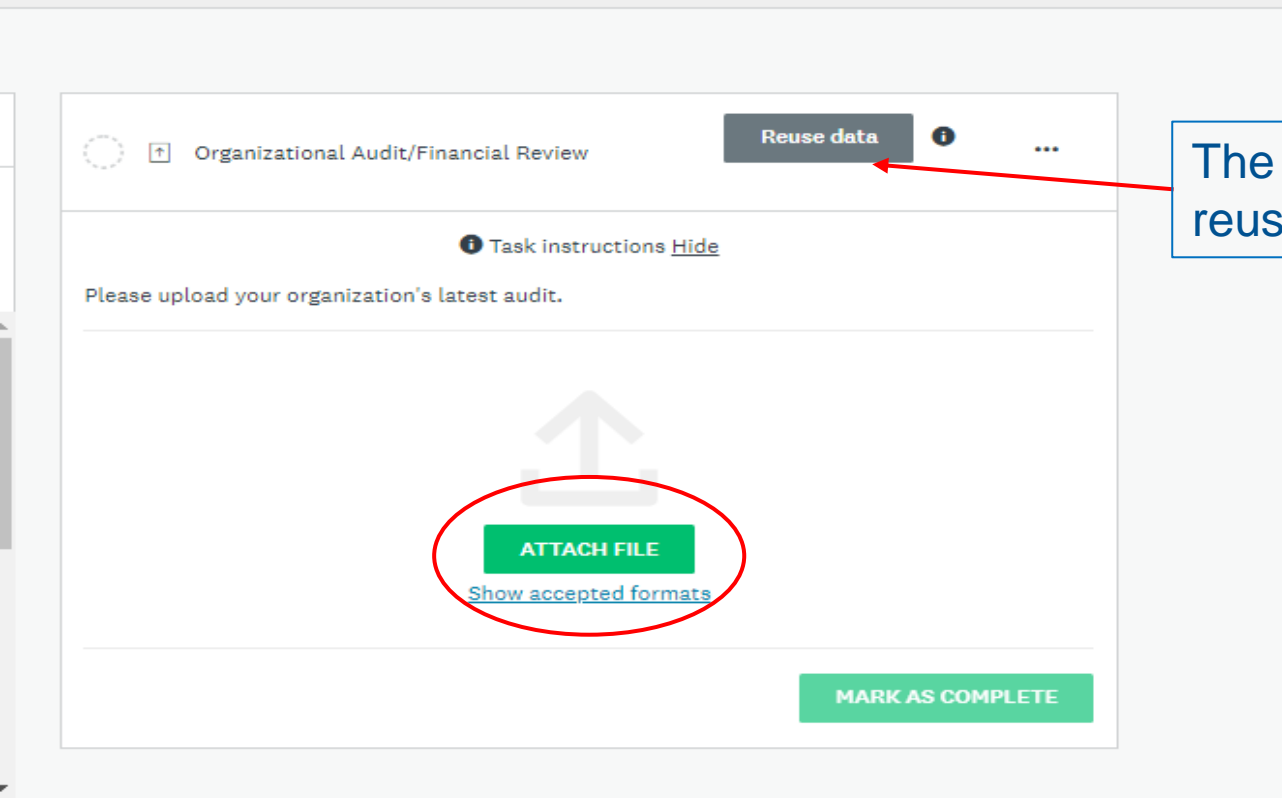
Some tasks you will have an option to reuse data or files. For those tasks, the option will pop up.



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 button labeled "Reuse data" with an information icon (i) and a menu icon (three dots). A red arrow points from a text box to this button. The text box contains the text "The option to reuse data." Below the title, there is a section for "Task instructions" with a "Hide" link. The instructions state: "Please upload your organization's latest audit." In the center of the form 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 link labeled "Show accepted formats". At the bottom right of the form is a green button labeled "MARK AS COMPLETE". The "ATTACH FILE" button and the "Show accepted formats" link are circled in red.

Organizational Audit/Financial Review

Reuse data

Task instructions [Hide](#)

Please upload your organization's latest audit.

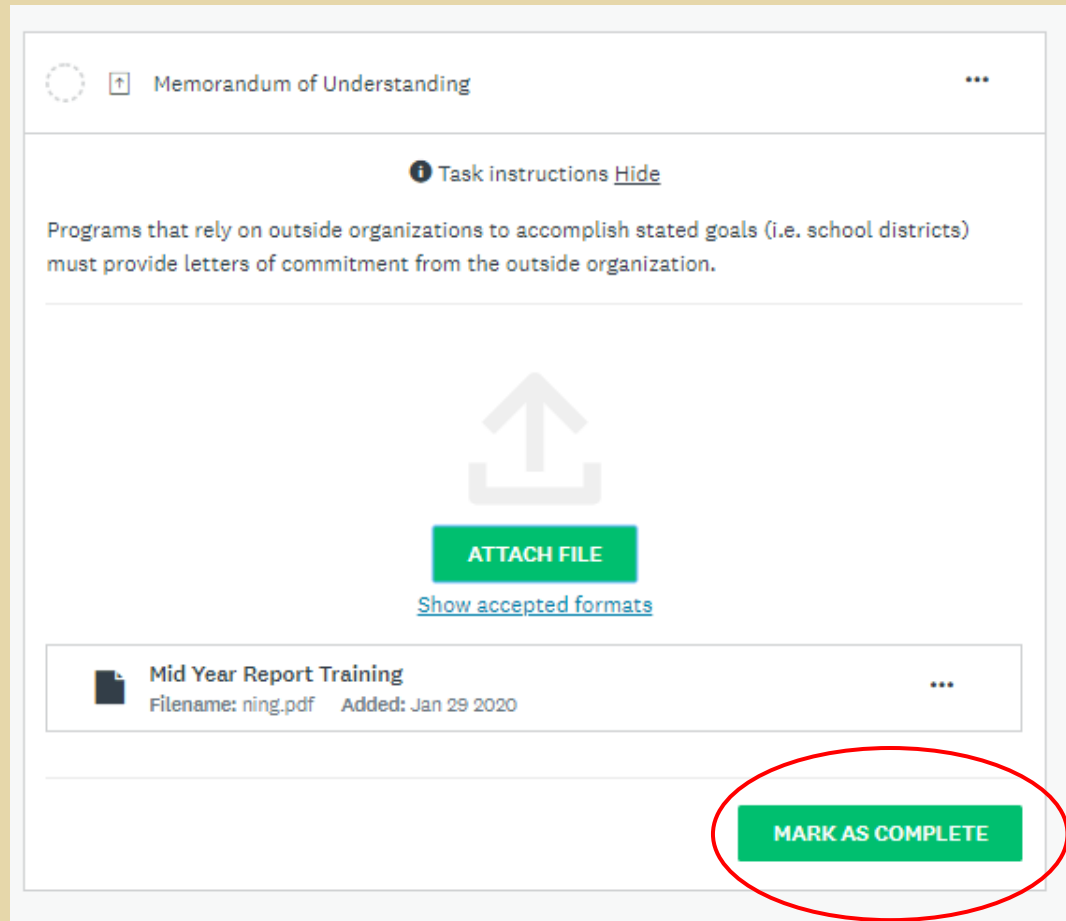
ATTACH FILE

[Show accepted formats](#)

MARK AS COMPLETE

The option to reuse data.

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 circular progress indicator, an upward arrow icon, and the title "Memorandum of Understanding" with a three-dot menu icon. Below this is a section titled "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." In the center, there is a large upward arrow icon and a green "ATTACH FILE" button. Below the button is a link "Show accepted formats". At the bottom, there is a list of files. The first file is "Mid Year Report Training" with filename "ning.pdf" and added date "Jan 29 2020". To the right of the file list is a three-dot menu icon. At the bottom right of the interface, there is a green "MARK AS COMPLETE" button, which is circled in red.

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.

[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

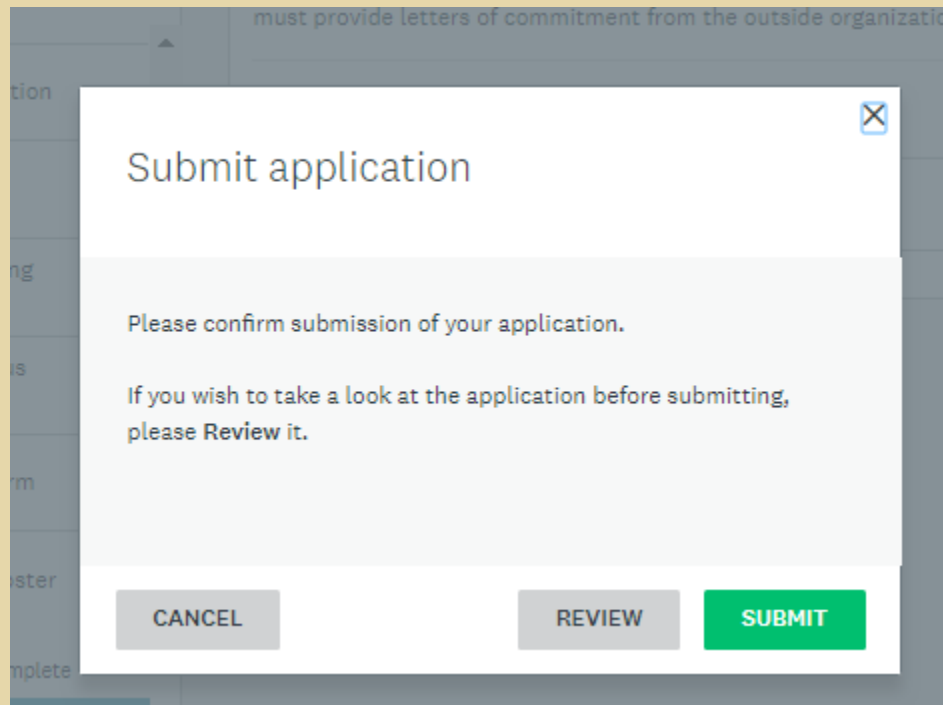
Deadline: Mar 13 2020 09:00 PM (UTC)

Programs that rely must provide letter

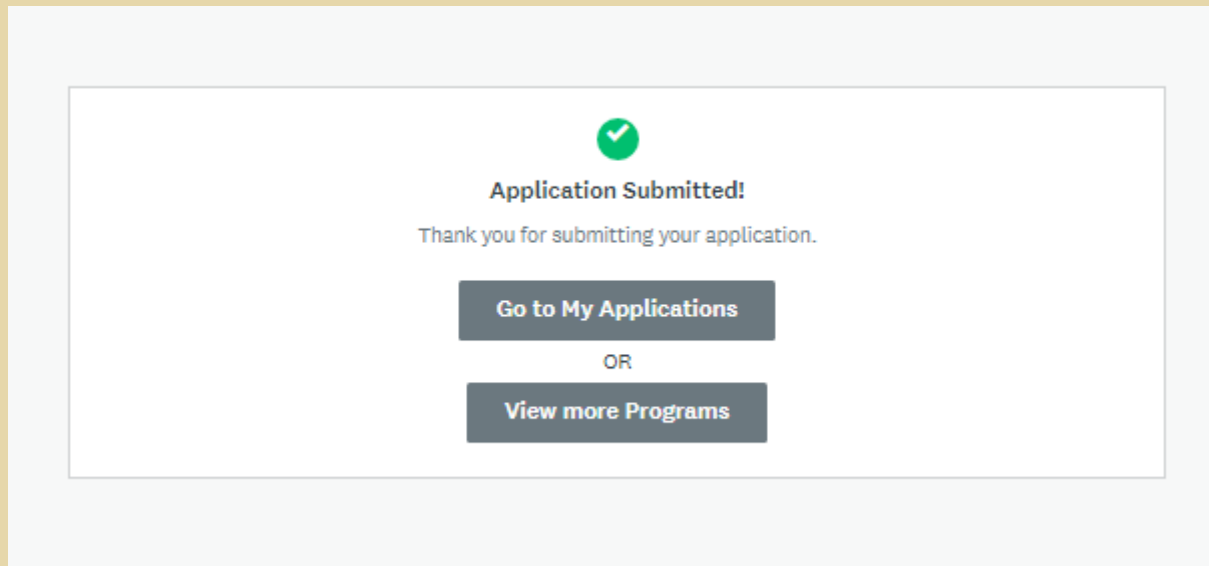
Mid Year
Filename

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

Final confirmation before Clicking on SUBMIT

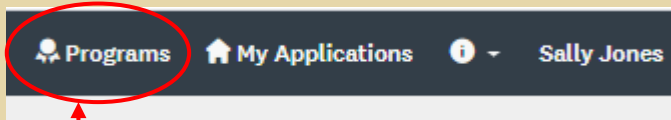


**A pop up message will show confirmation.
An email will also be sent to the user's email account.**



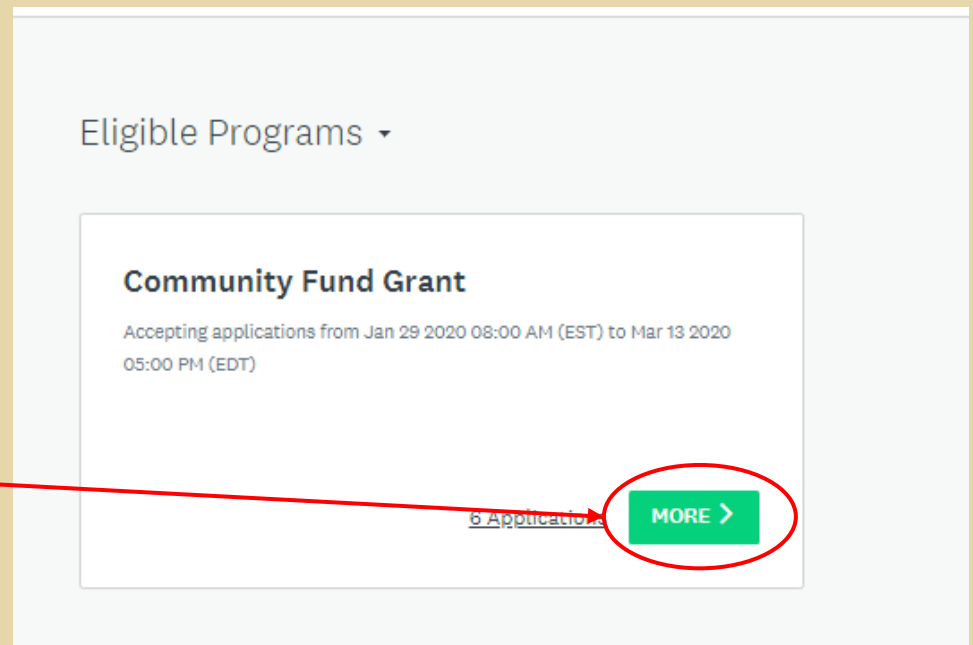
If your agency would like to apply for another program:

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
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Community Fund Grant

6 Applications

APPLY

Opens

Jan 29 2020 08:00 AM (EST)

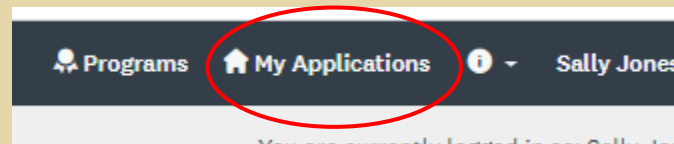
Deadline

Mar 13 2020 05:00 PM (EDT)

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)	VIEW
<input type="checkbox"/>	Community Fund Grant	8884159853	Under Review	✓ Submitted	Jan 29 2020 03:41 PM (UTC)	VIEW
<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)	CONTINUE

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

Thank you



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