



Heart of Florida United Way

Emergency Food & Shelter Program (EFSP) Online Application User Manual

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Section 1 Overview of HFUW’s Online System

Heart of Florida United Way’s (HFUW) online system is web-based and can be accessed through the internet. The contacts in your agency who will need to access the system will need to be assigned a User ID and Password.

When entering data, you have the opportunity to save your work and access multiple sections at a time. When you have completed a section, you will do a “final submission” of that section while still having the availability to continue working on other sections.

In addition, forms and reports are available to you for printing, both before and after submission.

Please be advised: While multiple users are able to work in the online system at the same time, they are not able to work on the same form, budget, or section at the same time. Please ensure agency staff working in the online system are coordinating their efforts to prevent the loss of data.

Note: All of the pictures in this training manual use an imaginary agency and programs and the data entered are fake. The information is for system training purposes only and should not be considered appropriate content.

As you navigate through the online system, please take note of the following buttons you will frequently see:

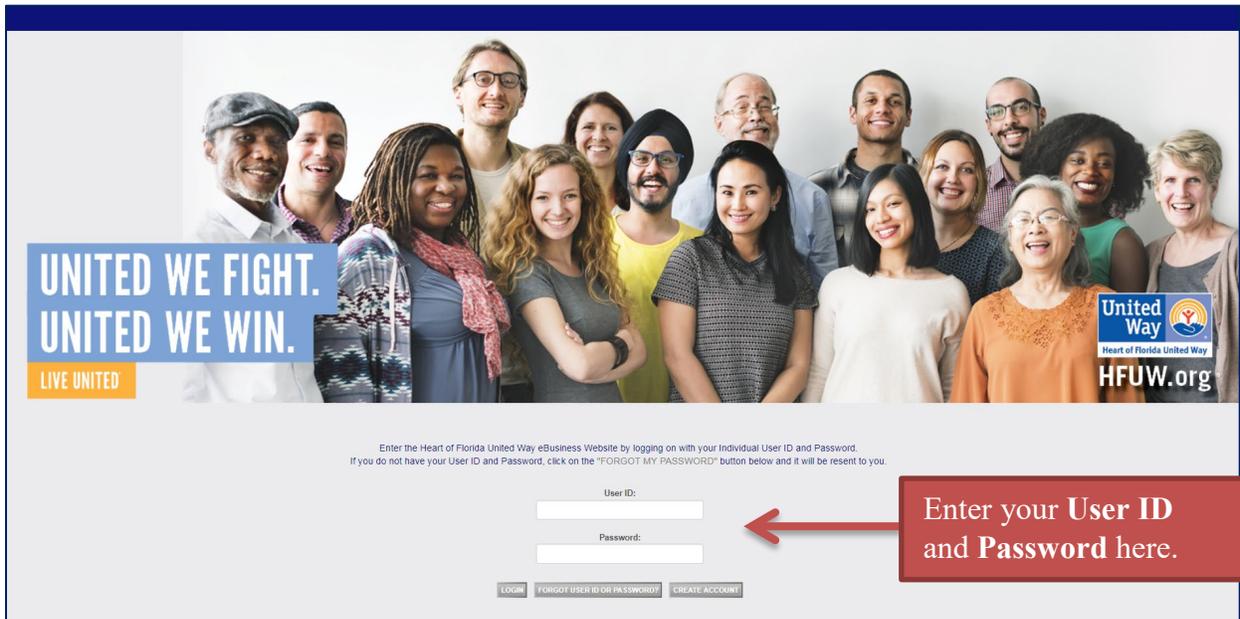
	This is the Save button. Use this button frequently as enter data in the online system.
	Use the Submit button when you have completed your data entry. You will not be able access the section after you have “submitted” it.
	Use the Return button to go back to the main menu of your package. Please remember to save your work prior to using the Return button.
	Use the Next button to move on the next section in the package. If you have entered any work, ensure you have saved it.
	Use the Previous button to go back to the previous section in the package. If you have entered any work, ensure you have saved it.
	Use the Cancel button to discard any data entry you do not want to save.

Please feel free to direct any technical assistance questions or concerns to Carolyn Shermer, Chief Information Officer at 407-429-2172 or email Carolyn.Shermer@hfuw.org. You may also contact your Heart of Florida United Way staff liaison.

Section 2 How to Log into the System

When you are given your login information, please access the online system at the following web address: www.UnitedWayWorks.org.

You will be redirected to a login screen that looks similar to the following:



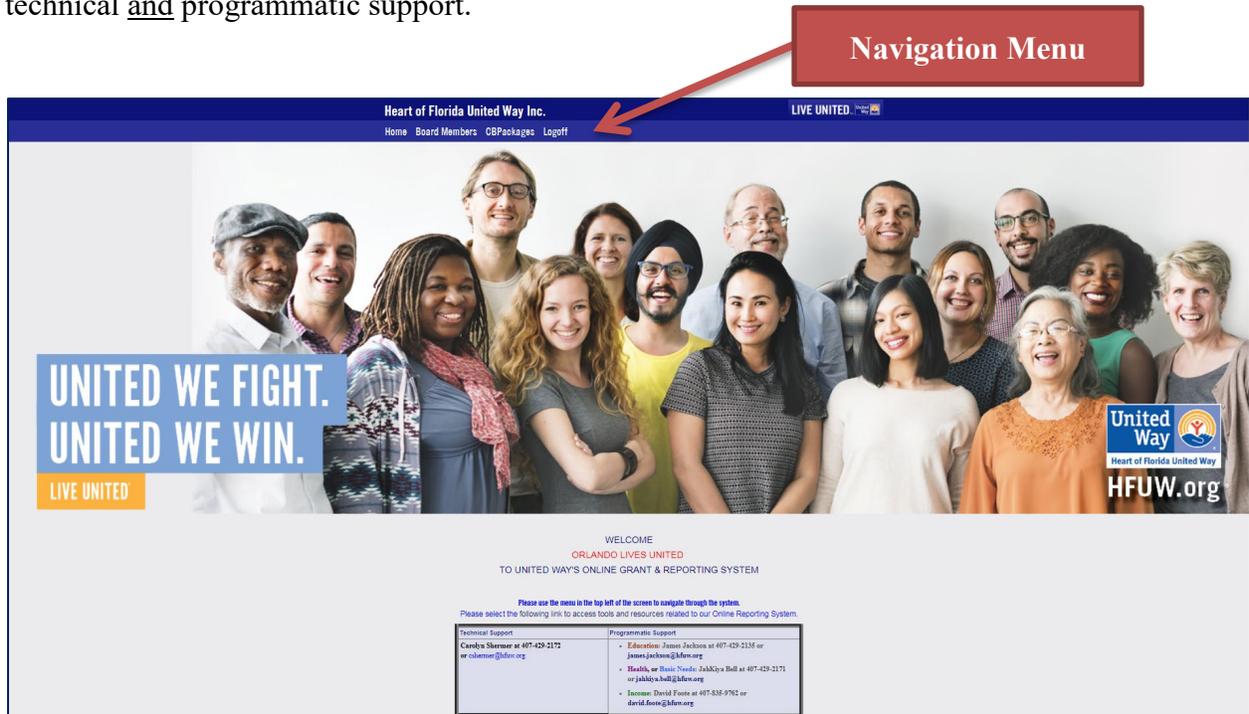
Enter your **User ID** and **Password** and select the **Login** button. You will be redirected to your agency's Home Page.

If you do not have a login for HFUW's EFSP Online Application Manual or if you have any questions about the Emergency Food & Shelter Program (EFSP), please contact:

June Iv, MBA
Manager, Emergency Food and Shelter Program (EFSP)
P: (407) 429-2180
E: EFSP@hfuw.org

Section 3 Home Page

This is an example of an agency **Home Page**. Note that it provides information on how to access technical and programmatic support.



At the top of the page is your **navigation menu**, which provides a list of the sections in which you have access.

Tips for Navigating:

- Unless otherwise noted, we strongly discourage you from using the Back button on your web browser. While it may work properly *sometimes*, using the Back button can also cause the system to not display properly or to have to reload data to your screen. In addition, if you have unsaved entries it may cause those entries to be lost.
- **Save your work regularly while you are typing.** If you have unsaved entries and navigate to a different section of the system, you will **not** be prompted to save your work, and anything not saved will be lost. It is important to keep in mind that typing is not considered activity on the computer server. After several minutes of inactivity, the system will “time out” and any data that has not been saved will be lost.
- It may be helpful to complete your answers in another program—such as NotePad or WordPad—and copy and paste them into the appropriate text boxes. This will reduce the chances of a “time out” and provide you with a copy of your answers for future reference.

Please Note: When copying pasting from a Word document or any program that includes text formatting, items such as bullets, tables, and apostrophes will reformat and may make it difficult to read on the completed document. It is best to copy and paste from a plain text document.

Section 4 Packages

The link for **CBPackages** provides you with a continuous list of forms, budgets, sections, etc. your organization will need to complete without the use of extensive menus. Selecting **CBPackages** from the top menu will redirect you to a screen that is similar to the following:

Heart of Florida United Way Inc. LIVE UNITED

Home Board Members CBPackages Logoff

UNITED WE FIGHT. UNITED WE WIN. LIVE UNITED

Select the **Package** your organization will be completing.

PACKAGES
To enter your data, please select the underlined link to access all of the forms and sections included in the "package" being completed. To create a PDF copy of your completed "package", please select the printer icon.

Due Date	Description	Status
Oct 20, 2017	2017-2018 Quarter One Report	Outstanding

All of the forms, budgets and other sections that must be submitted are organized into a “package”. Select the package for the online package you are submitting. *Please Note:* There may be multiple packages available, so please be sure you have selected the correct package for the data you are entering.

Your organization will not be able to run “blank” version of the package until you have opened each form, budget, or other section and selected the **Save** button. After saving each section, you may print the online package as one PDF document or you pay print forms, budgets and sections as individual PDF documents.

Tips

- The Completion Status for each form, budget, or section as well as the “package” will display **Outstanding** for any sections have not been submitted.
- Once you have clicked on the **Submit** button for any section, you will no longer be able to makes change or updates to that section. You will only be allowed to view the section or print to a PDF.
- While working on the forms, if you decide to log off or work on a different section, you **MUST** select the **Save** button in order to have your information remain in the system.

Section 5 Completing Your Package

Once you have selected the highlighted text for the Package, you will be redirected to a screen that could look similar to the following:

Heart of Florida United Way Inc. - United Way

	Section	Status
 	I. Cover Page	Outstanding
 	II. Attestation & Certification	Outstanding
 	III. Agency Overview	Outstanding
 	IV. Funding Request	Outstanding
 	V. Required Attachments (Part 1)	Outstanding
 	V. Required Attachments (Part 2)	Outstanding

The forms, budgets and other sections that must be completed will be listed. Scroll down the screen to get an overview of what must be submitted as a part of your online application. Select the name of the section view the form, budget or other section. After you have opened and selected the **Save** button, use the printer icon to run a PDF of the section. However, **do not use the Excel icon** as this feature does not work properly.

Section 6 Forms

To complete, select the appropriate form from the list in your Package. Once you understand how one form works, the others will work in a very similar manner.

After you have selected a form simply enter the requested information in the spaces provided. Remember to **SAVE** your work often and **SUBMIT** the form when you are sure it is complete.

Tips for Completing Forms

- The Completion Status will display “Outstanding” for Forms that have not been submitted.
- As with all sections, once you have clicked on the Submit button, you will no longer be able to manipulate the form. You will still be allowed to view it.
- While working on the forms, if you decide to log off or work on a different section, you **MUST** select the **SAVE** button in order to have your information remain in the system.

Forms are used to collect narrative information in the online application, providing you with a text box with which to respond to specific questions. A form looks similar to the following:

Please answer the following questions for the agency's most recently completed 12-month period.

1. What is the total number of Board slots available per the organization's by-laws?

2. How many Board slots were filled?

3. How many Board meetings were held?

4. What was the average percentage of attendance for all Board meetings held?

5. According to your agency's by-laws, describe the term limits and attendance guidelines and requirements for Board and committee meetings.

Response boxes
for numbers,
figures, or text.

Section 7 Attachments

In the Attachments section, you will upload all of your requirement documents into the system. If applicable, please review any documents already in the system to determine which must be updated, deleting any outdated documents and uploading more recent versions.

Before you begin:

- If you have only a paper copy of a document, you will need to scan the paper document and then electronically attach it to your quarterly report.
- Check the size of the document before you upload it. **The system will slow down if you try to attach a document larger than 5MB.**
- If applicable, please review the **Supporting Documents Checklist** Form, which is a checklist of the required documents.

To add a document, select the **Add** button to locate the document on your computer and upload into the system. When you select Add you will be directed to a screen that looks like this:

REQUIRED DOCUMENTS

Heart of Florida United Way Inc. (36582 - United Way)

REQUIRED DOCUMENTATION / ATTACHMENTS

Please upload all required documents in this section.

All requested documents must be submitted by the deadline. **Please remember that documents larger than 5MB should not be uploaded.** Please contact your Heart of Florida United Way staff liaison if you need any assistance.

There are currently no documents available for display.

ADD SUBMIT RETURN PREVIOUS

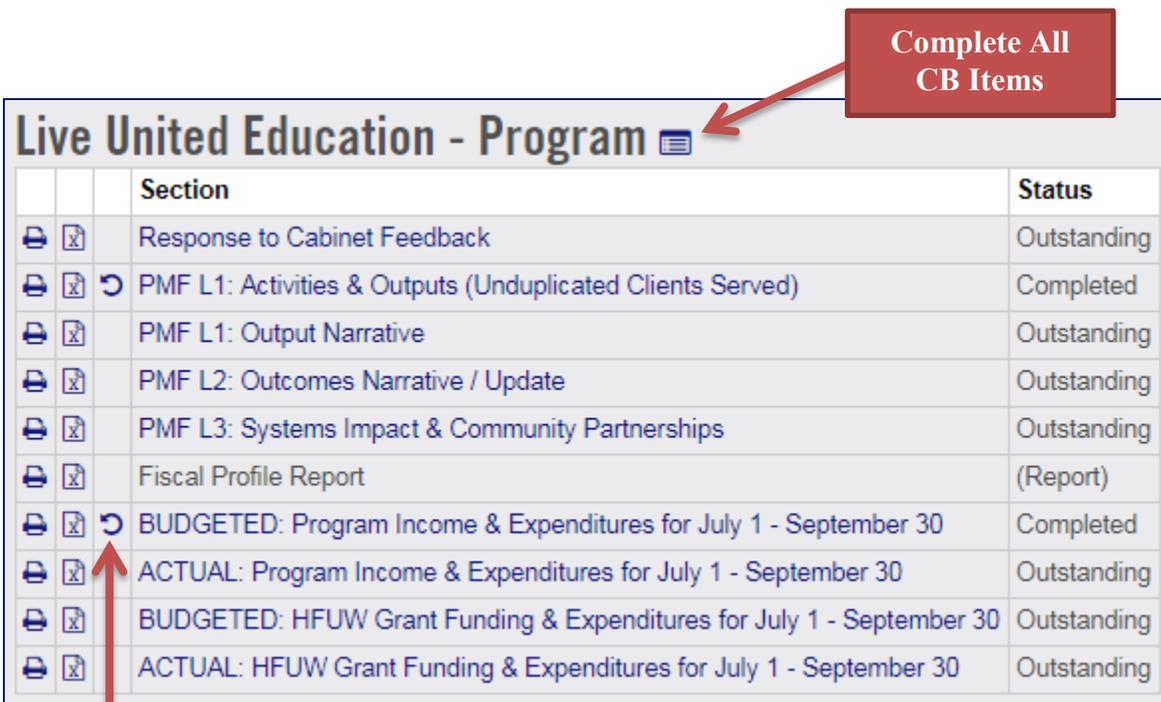
Please refer to the Required Documents Checklist for the complete list of documents that must be uploaded into the system.

You should attach documents **FIRST** and then complete the checklist. If you do not have the requested documents, please note this on the checklist. Be sure to include an explanation as to why the requested documents are unavailable.

Section 8 Submitting the Online Package

You have two options for submitting:

1. You may submit each section of the report one at a time using the  button provided in each section of the online report.
2. You may use the **Complete All CB Items** to submit all of the sections at either the agency or the program level.



Complete All CB Items

		Section	Status
		Response to Cabinet Feedback	Outstanding
		PMF L1: Activities & Outputs (Unduplicated Clients Served)	Completed
		PMF L1: Output Narrative	Outstanding
		PMF L2: Outcomes Narrative / Update	Outstanding
		PMF L3: Systems Impact & Community Partnerships	Outstanding
		Fiscal Profile Report	(Report)
		BUDGETED: Program Income & Expenditures for July 1 - September 30	Completed
		ACTUAL: Program Income & Expenditures for July 1 - September 30	Outstanding
		BUDGETED: HFUW Grant Funding & Expenditures for July 1 - September 30	Outstanding
		ACTUAL: HFUW Grant Funding & Expenditures for July 1 - September 30	Outstanding

Reset Completed CB Item Back to Outstanding

If you submit a section prematurely, you now have the opportunity to “unlock” the section yourself using the **Reset Completed CB Item Back to Outstanding** feature in the report.

Section 9 Printing

As previously mentioned, we strongly suggest that after your package has been submitted, you print a PDF version and keep for your records. To do this, choose CBPackages in the menu.

Select the printer icon next to the package. *You may also select the printer icon next to any section in the package to print that section.*

PACKAGES

To enter your data, please select the underlined link to access all of the forms and sections included in the "package" being completed. To create a PDF copy of your completed "package", please select the printer icon.

Due Date	Description	Status
Oct 20, 2017	 <u>2017-2018 Quarter One Report</u>	Outstanding

Use the printer icon to print the full online application as a PDF document*.

You will be redirected to an online version of Adobe Reader that displays the report for you. A sample report is diagramed on the following page.

***Please Remember:** If you would like to print a “blank” copy of the full online application, you must open each form, budget, and section of the online application and select **Save**.

After a new window has opened with an online PDF version of the application, please save this document locally on your computer/system, close the online version, and open using your desktop version of Adobe Acrobat or Adobe Reader.

Adobe has many other functions which you may find useful, so feel free to explore it more.

Note: We recognize that the text is small when printed, but this is a feature that cannot be changed.

Appendix 1: Listing of Icons and Buttons

Below provides an overview of the icons and buttons that you will see as you use the reporting system.

	This is the Save button. Use this button frequently as you complete your quarterly report.
	Use the Submit button when you have completed your data entry.
	Use the Return button to go back to the main menu of your package. Please remember to save your work prior to using the Return button.
	Use the Next button to move on the next section in the package. If you have entered any work, ensure you have saved it.
	Use the Previous button to go back to the previous section in the package. If you have entered any work, ensure you have saved it.
	Use the Cancel button to discard any data entry you do not want to save.
	This is the Print to PDF button that allows you to create an online PDF version of the package and/or form, budget, or section.
	Use the Choose File button to find documents saved locally on your computer/system for uploading in the Required Documents section.
	For fields that request a date, you can choose to click on the Calendar icon and select a date from the displayed calendar.
	Use the Delete icon to remove documents from the Required Documents section.

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