Community Impact Management

Supported by the Kent County **Ready by Five** Millage

2022

Agency Training Manual

First Steps Kent

401 Hall St. SW Suite 385

Grand Rapids, MI

49503

For support, please contact:

First Steps Kent Staff

readybyfivekent@firststepskent.org

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Updated: July 13, 2022

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Welcome to e-CImpact!

Accessing e-CImpact

Requirements: All you need to access e-CImpact is a computer with an internet connection and current version of web browser (example: Internet Explorer, Firefox, Chrome, Safari).

Please Note: All proposals and funded programs will be assigned to one agency profile. Be sure there is a designated primary contact that will be set up as your agency registers for the first time. There is one Primary Contact per agency. The Primary Contact is the designated individual who can add and edit additional users at each agency.

To access e-CImpact from the First Steps Kent website, please go to: https://www.firststepskent.org/millage

Direct access to the agency site is: https://agency.e-cimpact.com/login.aspx?org=FirstStepsKent

Please bookmark the address to easily access e-CImpact at your convenience.

Additional information about the RFP Process is available on the First Steps Kent website at: https://www.firststepskent.org/millage

Questions?

If your agency has technical issues with the e-CImpact system, please reach out to First Steps Kent staff at: readybyfivekent@firststepskent.org

Note: During the RFP development process First Steps Kent is available to assist with questions and issues specifically related to the e-CImpact online application process. We are unable to answer questions related to the RFP unless they are submitted through the written process as described in the RFP documents.

Registering a New Agency

Registration is required for all agencies. Please proceed with site registration.

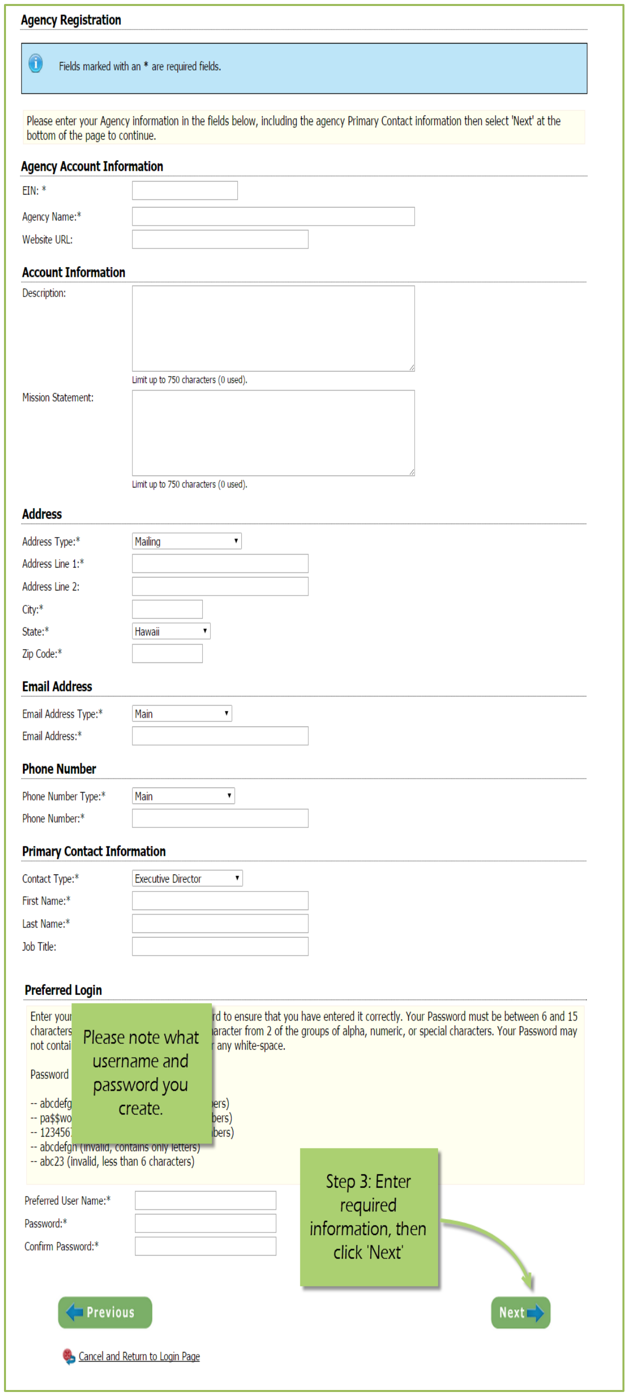
Step 1: From the agency login page select 'Create new agency account'.

Step 2: Please read all directions carefully, and then click ‘Next’ to continue with your registration process.

Provide your agency’s EIN Number. Click “Next”.

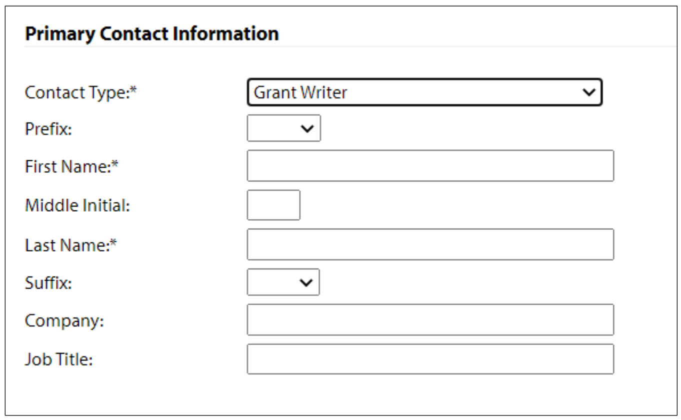
**EIN – the system will automatically validate your EIN, confirming your agency do <u>not</u> already have an e-CImpact account. The system will also automatically enter any information linked to the EIN entered.*

Step 3: Please enter all required information regarding your agency. Required information is noted with an asterisk. Then proceed to the next page.



Step 4: Confirm the Primary Contact for your Agency.

This is the page where you will enter your agency's Primary Contact information. This is the only individual at your agency who will be able to edit and assign additional users submitting or working on proposals or entering contract-related information. Be sure everyone in your agency knows who this person is!

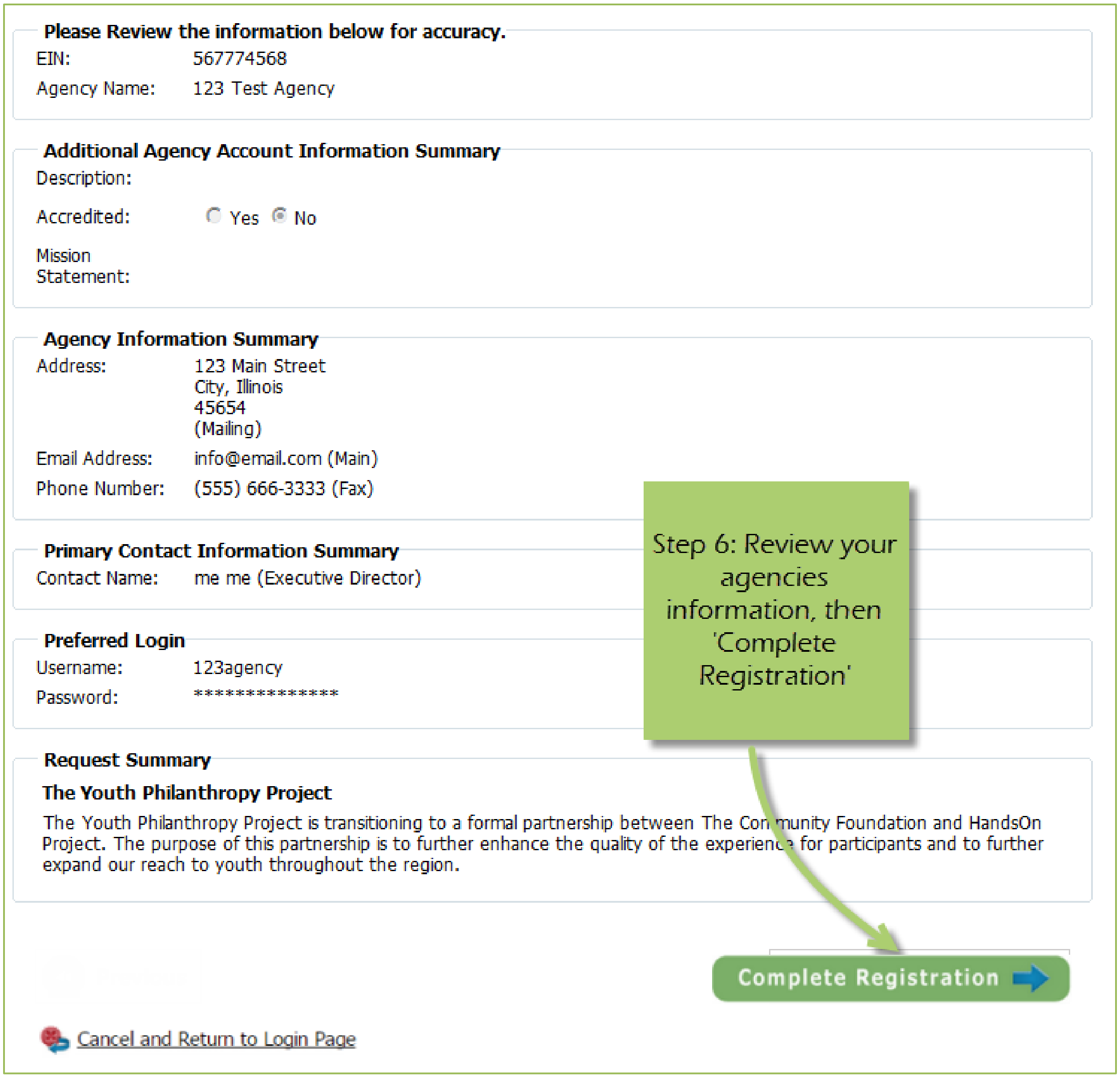


Primary Contact Information

Contact Type:* Grant Writer
Prefix:
First Name:*
Middle Initial:
Last Name:*
Suffix:
Company:
Job Title:

Step 5: Select the 2023 Funding Opportunity and then continue to the next page.

Step 6: Review all agency information entered, and then click 'Confirm Registration'.


Please Review the information below for accuracy.

EIN: 567774568

Agency Name: 123 Test Agency

Additional Agency Account Information Summary

Description:

Accredited: Yes No

Mission Statement:

Agency Information Summary

Address: 123 Main Street
City, Illinois
45654
(Mailing)

Email Address: info@email.com (Main)

Phone Number: (555) 666-3333 (Fax)

Primary Contact Information Summary

Contact Name: me me (Executive Director)

Preferred Login

Username: 123agency

Password: **************

Request Summary

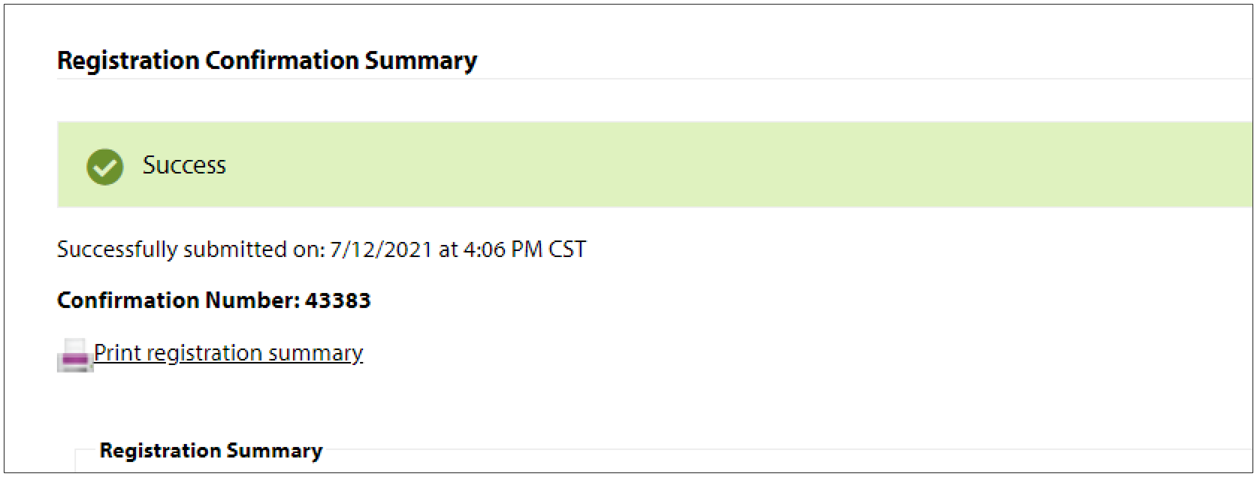
The Youth Philanthropy Project

The Youth Philanthropy Project is transitioning to a formal partnership between The Community Foundation and HandsOn Project. The purpose of this partnership is to further enhance the quality of the experience for participants and to further expand our reach to youth throughout the region.

Complete Registration

Cancel and Return to Login Page

You should see this page with all agency information submitted.



Once your agency's registration is completed you will be able to print your confirmation page. You will also receive a confirmation email.

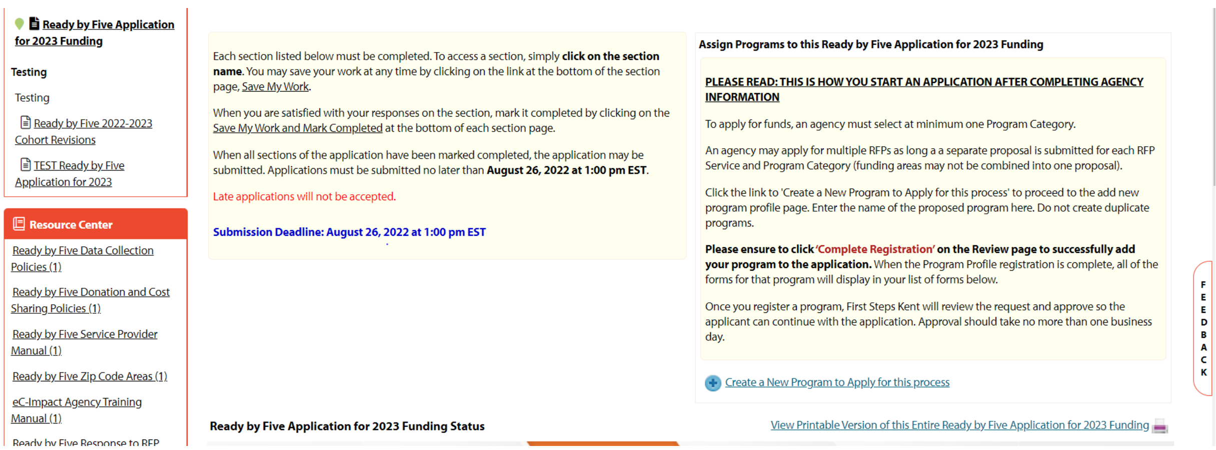
Click "Next" to complete the registration process.

At some time in the registration process, you will see an option to select the "ready by Five Application 2023" button. Select this button and continue with the registration.

Completing the 2023 Application(s)

The Ready by Five 2023 Application process requires agencies to complete three agency level forms and program level forms. An agency will complete the Agency levels forms once, regardless of how many programs. The amount of Program level forms will depend how many Requests for Proposals an agency applies for. Please follow the steps below to fill out agency and program level forms.

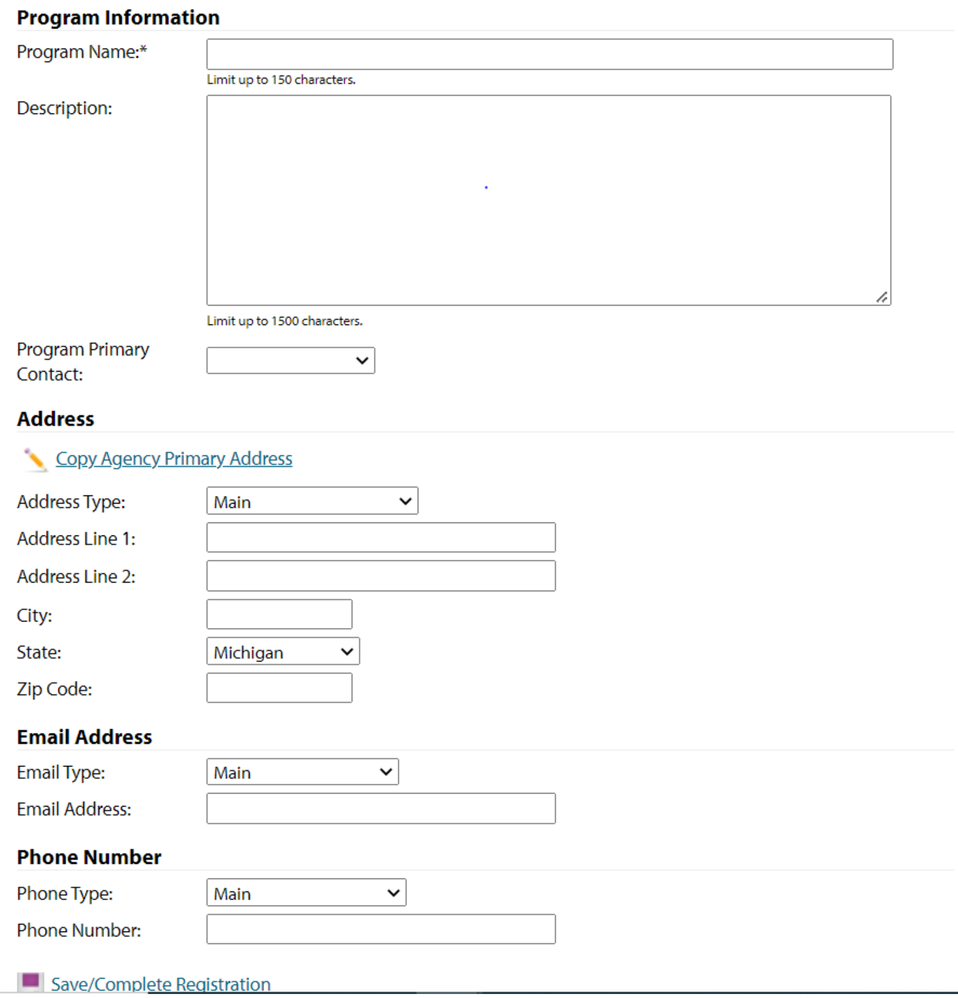
Step 1: Locate and click the 'Create a New Program to Apply for this process' link.



Step 2: This is the page where you will choose what funding opportunity your agency is applying for.

In addition to providing a program name and description, your agency will choose what funding opportunity to apply for in following steps.

Note: Please refer to the RFP Documents for a complete description of each funding opportunity.


Program Information

Program Name:*

Limit up to 150 characters.

Description:

Limit up to 1500 characters.

Program Primary Contact:

Address

Copy Agency Primary Address

Address Type: Main

Address Line 1:

Address Line 2:

City:

State: Michigan

Zip Code:

Email Address

Email Type: Main

Email Address:

Phone Number

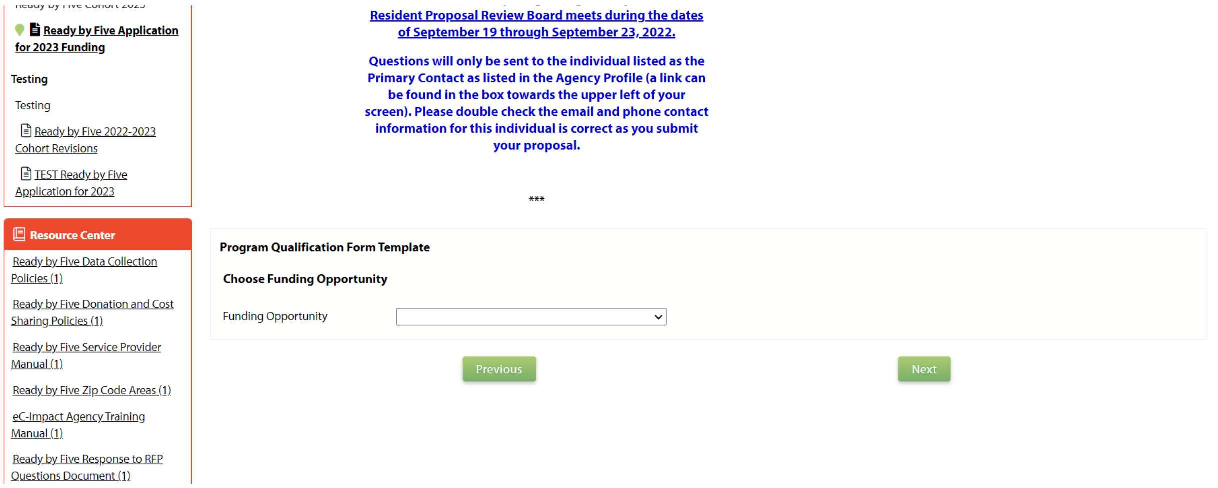
Phone Type: Main

Phone Number:

Save/Complete Registration

When complete, click ‘Save/Complete Registration’ at the bottom of the page.

Step 3: Choose the funding opportunity you want to apply for and continue through the registration process.



Step 4: Click ‘Continue’ and ‘Next’ to complete the process.

Note: Once you select a funding opportunity, First Steps Kent will review the request and approve so the applicant can continue with the application. Approval should take no more than one business day.

Applying for Multiple Programs Under One Agency

If your agency is applying for multiple funding opportunities, start this process over by selecting the “Create a new Program to Apply for this process” link with the plus sign.

Completing Agency and Program Forms

Once the program(s) is selected, you are ready to fill out your Agency and Program Level Information.

Step 1: Links to complete all Agency Level information are present. Remember, this is the information that is submitted for the agency and all proposed programs. This agency-level information will only be submitted once.

Ready by Five Application for 2023 Funding Status — View Printable Version of this Entire Ready by Five Application for 2023 Funding

Not Started | **In Progress** | Ready To Submit | Submitted

Item (* indicates Required Item)	Last Updated	Status	Options
***Test Profile**		**Not Started**	
Agency Information*		Not Started	
Attachment A: Agency Staff and Leadership Diversity*		Not Started	
Required Materials		Not Started	

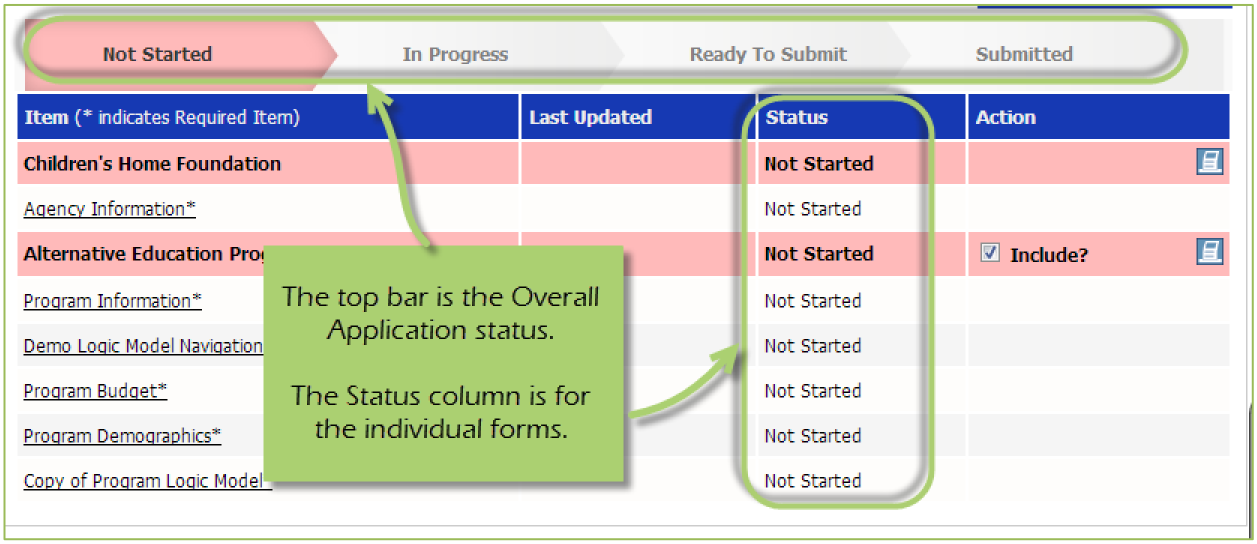
Step 2: Links to complete all Program Level information are present. Depending on how many programs you apply for, all relevant forms with be under the program name.

Item (* indicates Required Item)	Last Updated	Status	Options
***Test Profile**		**Not Started**	
Agency Information*		Not Started	
Attachment A: Agency Staff and Leadership Diversity*		Not Started	
Required Materials		Not Started	
Healthy Kent Kids	**7/12/2022 6:36 AM (CST)**	**In Progress**	**Include?**
Proposed Service Narrative and Details*	Heather Boswell 7/12/2022 6:36 AM (CST)	In Progress	
Ready by Five Result Indicator and Program-Specific Goals*		Not Started	
Number Served*		Not Started	
Partnering Organizations*		Not Started	
Budget Narrative*		Not Started	
Budget*		Not Started	
Proposal Certifications*		Not Started	
Language Plus	**7/12/2022 10:12 AM (CST)**	**In Progress**	**Include?**
Parent Education and Support - Translation and Interpretation Services Narrative*	Heather Boswell 7/12/2022 10:02 AM (CST)	In Progress	
Budget*	Heather Boswell 7/12/2022 10:12 AM (CST)	In Progress	
Proposal Certifications*		Not Started	
Translation and Interpretation Attachments		Not Started	
Training Superstars	**7/12/2022 10:19 AM (CST)**	**In Progress**	**Include?**
Ready by Five Training and Education Leader Narrative 2023*	Heather Boswell 7/12/2022 10:19 AM (CST)	In Progress	
Partnering Organizations*		Not Started	
Budget*		Not Started	

Step 3: Once all forms are in "Complete/Ready to Submit" status, you are ready to submit your application packet. Please make sure to review all information before submitting! Application are submitted once, when all proposals are ready to submit. Click the red "Submit" button for final submittal.

Form Status

This page works much like a check list. You are able to easily see how much of your application you have submitted.



Not Started: When the application or form is in not started status, it means that no data has been entered yet.

In Progress: If your form is set to 'In Progress', then the form has been started, and saved. The form has not been marked completed. The top bar will remain at 'In Progress' until all forms are marked completed.

Ready to Submit: Once all forms are marked completed, your top bar should move to 'Ready to Submit'. At this stage you should review any information entered, then move on to submit your application.

Submitted: When an application is in submitted status, you will no longer be able to make changes to the information on the forms. If you submit, and find you need to make an edit, you should contact your First Steps Kent Staff.

Entering Information

To begin filling out your application click on the desired form:

Save Options

After entering information on your forms, you have multiple save options.

Save My Work / Save My Work and Return to Previous Page: These options are for when you need to save, or move on to something else, and are not finished entering information.

Save My Work and Mark as Completed: This option is for when you have entered and reviewed your information and are ready to turn it in.

Tabbing from question to question will also save your information but will not mark it Completed.

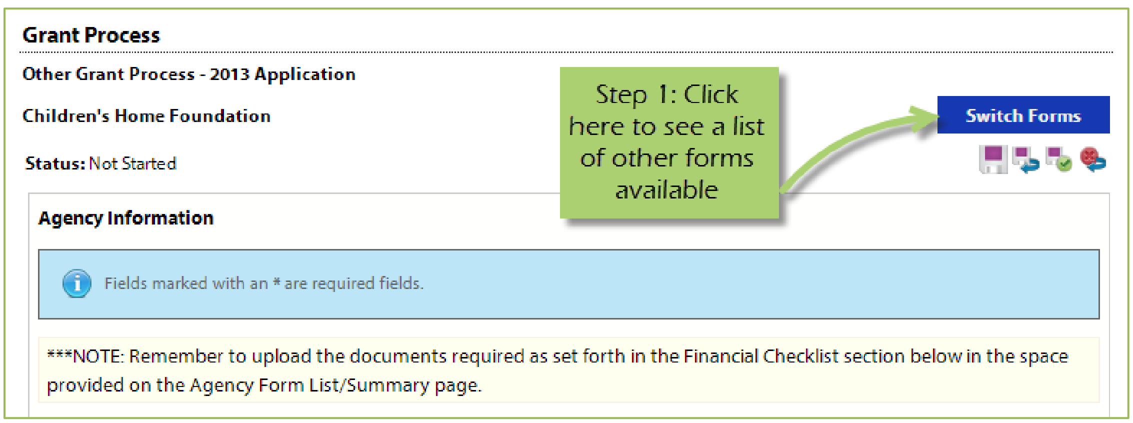
Switching Forms

There are two ways to switch forms within an application:

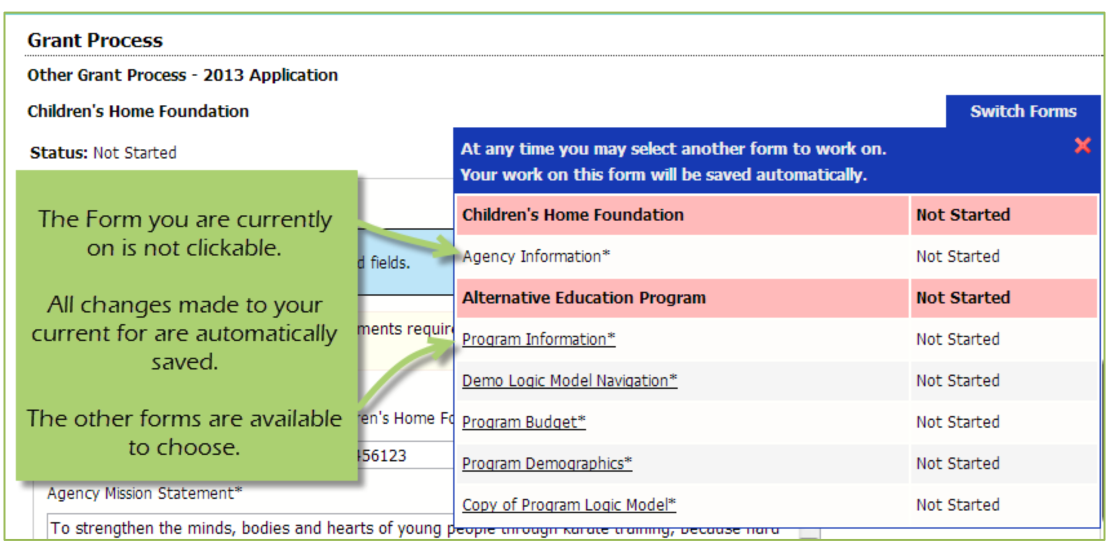
First: When you are finished with one form, click on ‘Save My Work and Return to Previous Page’, and then select the next form.

Second: You can use the ‘Switch Forms’ option, located in the upper right-hand corner.

Step 1: Click ‘Switch Forms’ to view the list of available forms.



Step 2: Click on the form you would like to move to.



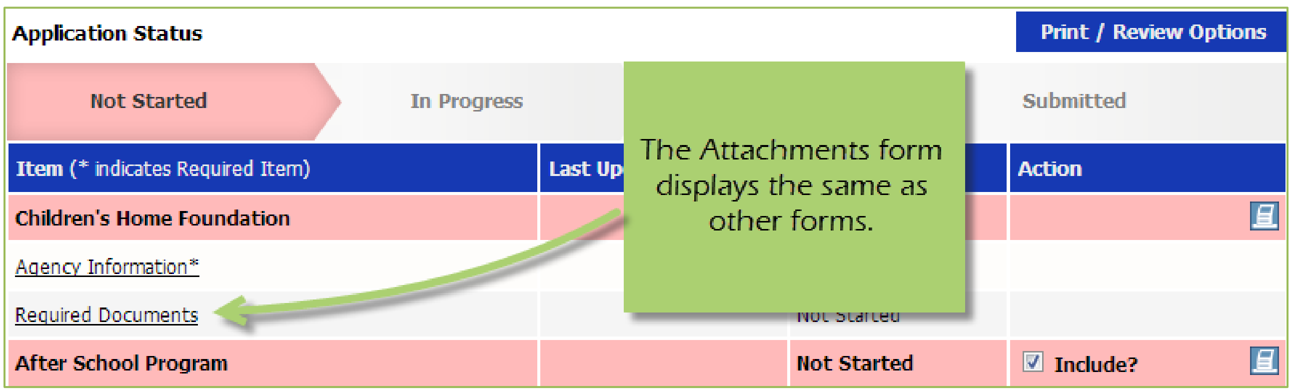
Attachments

Uploading Attachments

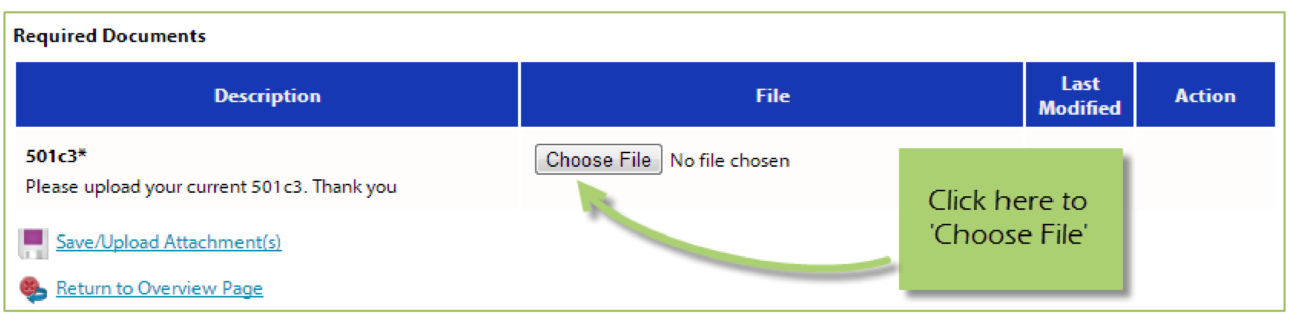
Accepted file types for uploading documents:

- Accepted file types: pdf, doc, docx, ppt, pptx, xls, xlsx, gif, jpg, jpeg, bmp, tif, rtf, and txt.
- Combined maximum file size is 8MB.

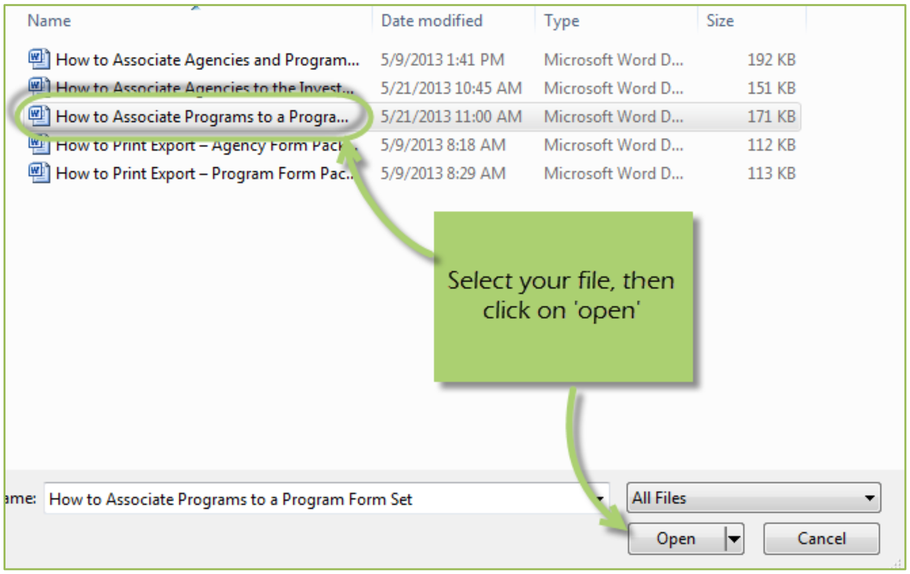
Step 1: Open documents form.



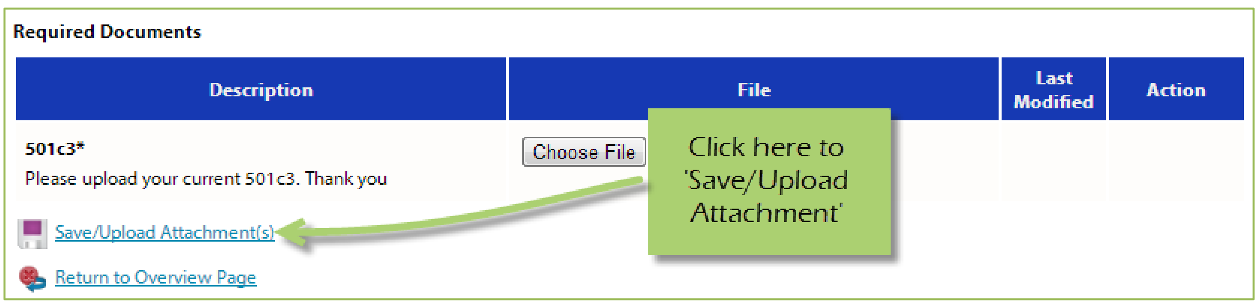
Step 2: Once you have confirmed your document meets the upload requirements, click ‘Choose File’.



Step 3: Browse your computer and select the desired document.

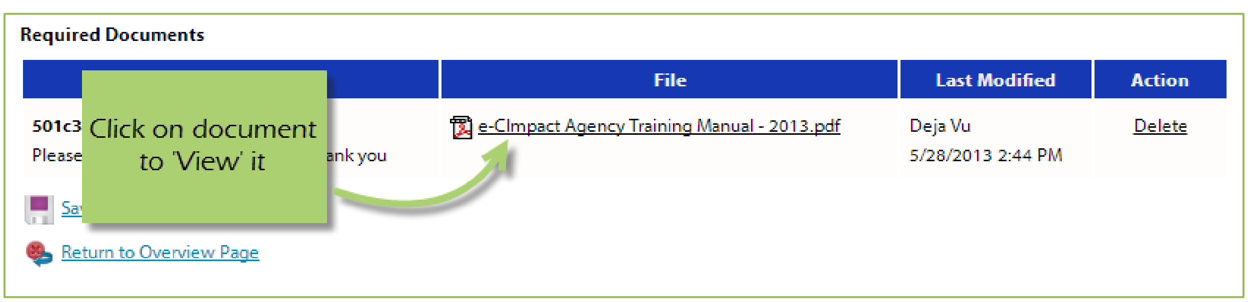


Step 4: 'Save/Upload Attachment(s)'.



Viewing Attachments

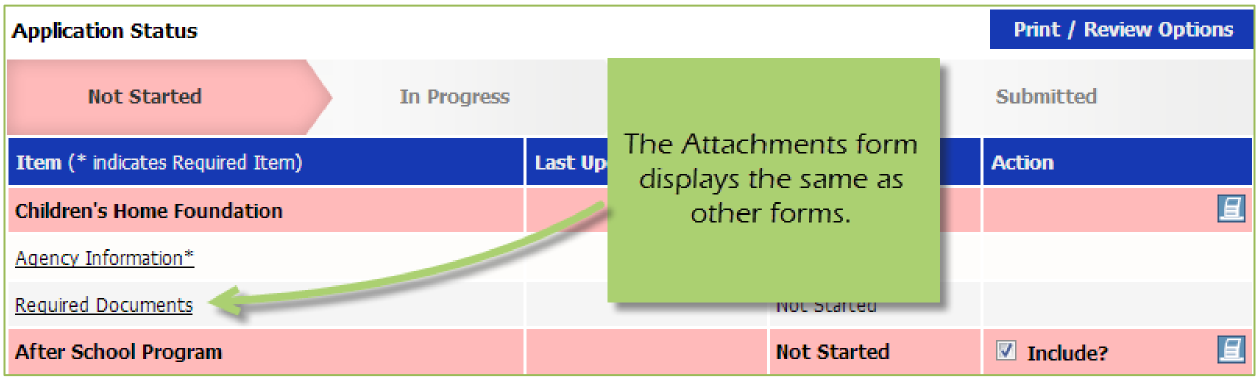
Step 1: Click on the document name to download and open it.



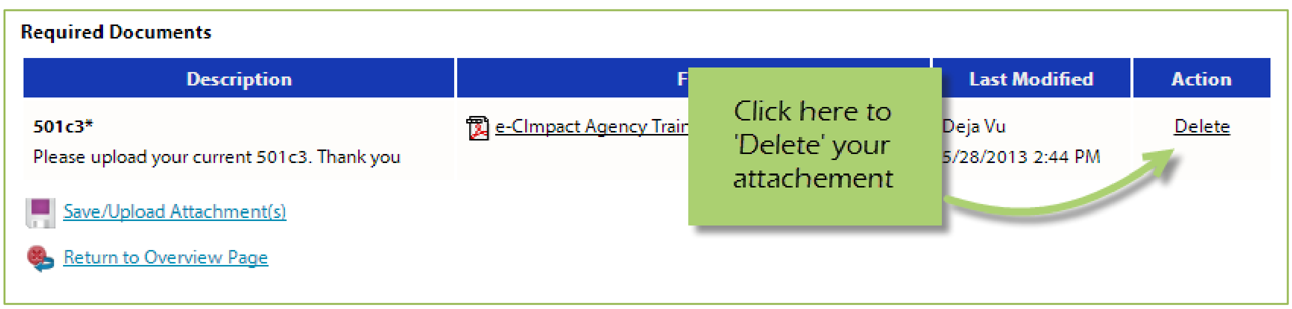
Deleting Attachments

In the event the wrong document was uploaded you may need to delete your attachment.

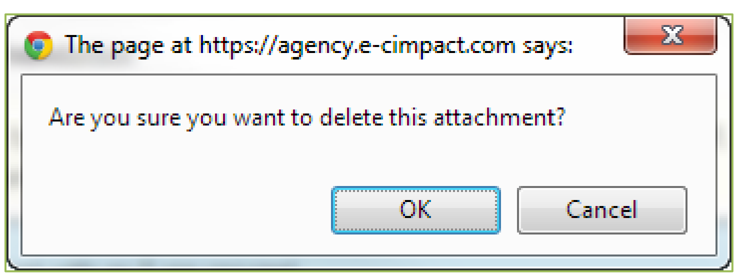
Step 1: Open documents form.



Step 2: Select 'Delete' next to the desired document.



Step 3: Confirm you would like to delete this attachment.



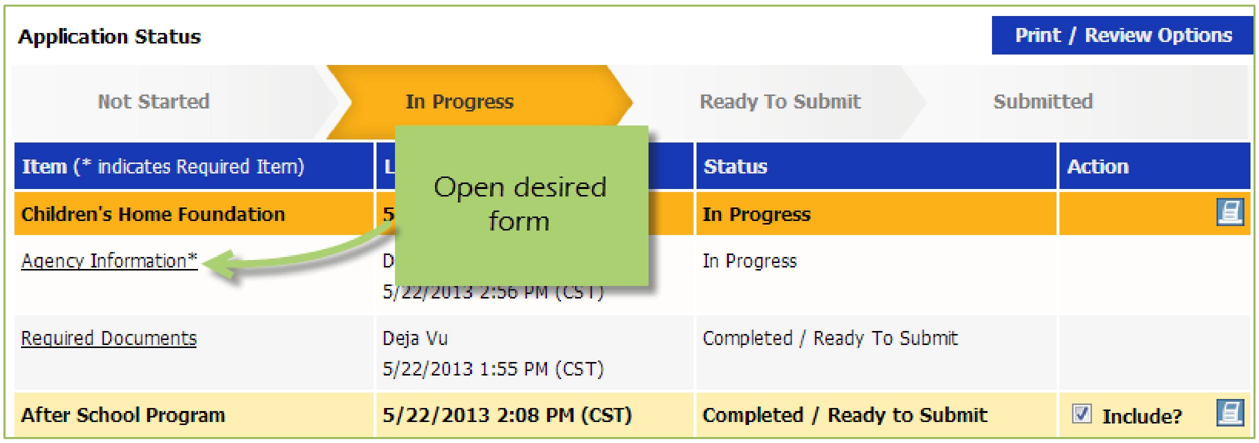
You are now able to upload the correct attachment.

Submitting Application

Mark Forms ‘Complete / Ready to Submit’

In order to submit your application, you must mark ALL forms ‘Completed / Ready to Submit’

Step 1: Open form.

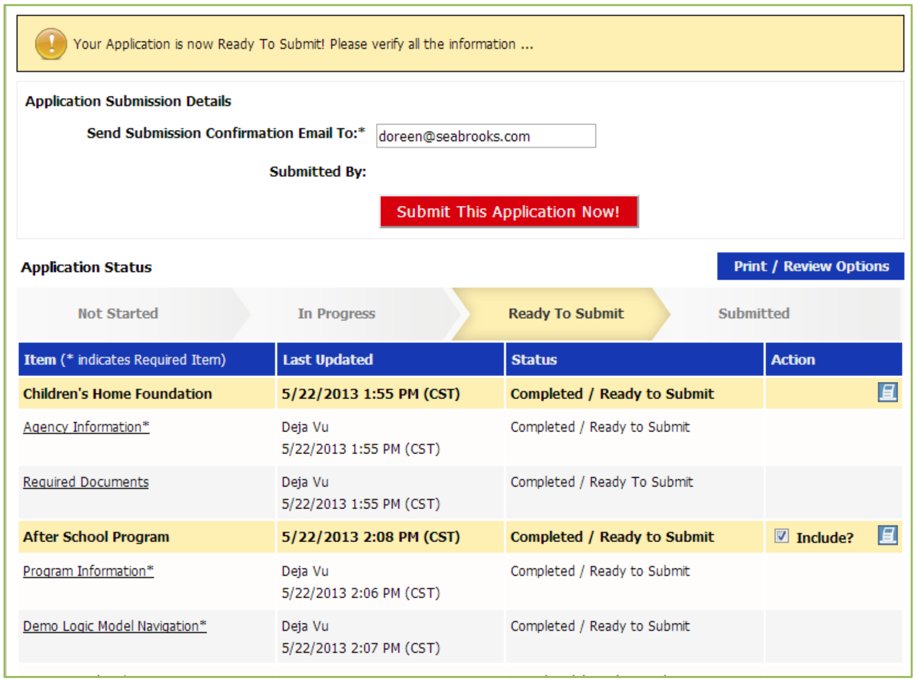


Step 2: Review information, then ‘Save My Work and Mark as Completed’.

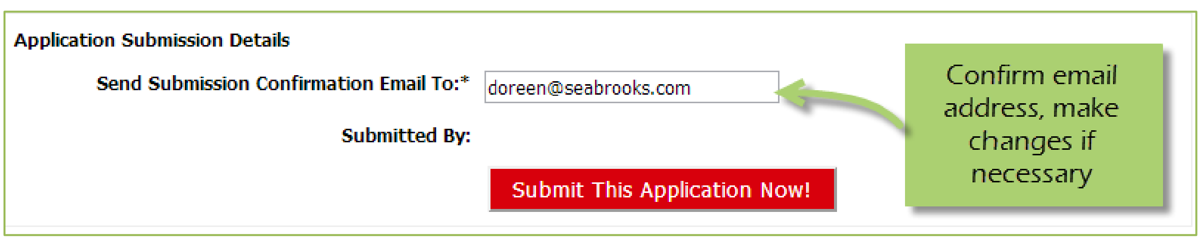
Complete these steps for each form until you have completed the entire application.

Submit!

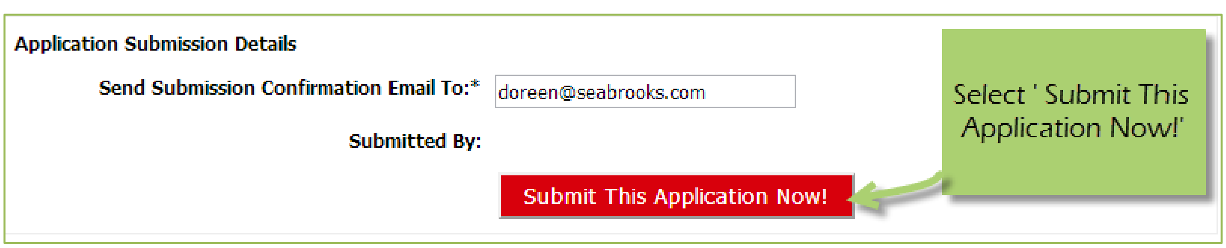
Once all forms are 'Completed / Ready to Submit', the 'Submit This Application Now!' option will appear at the top of the page.



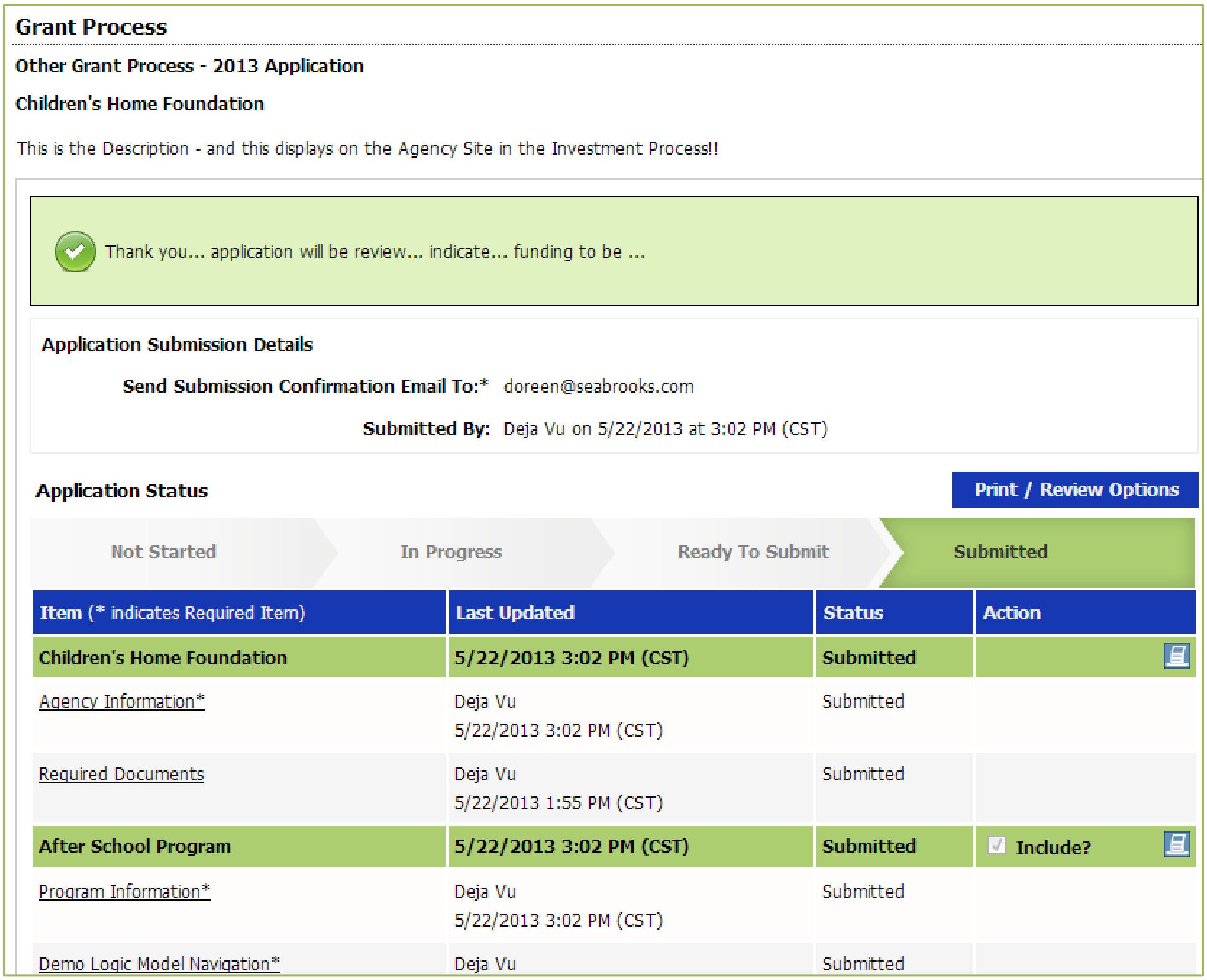
Step 1: Confirm the email address to send the confirmation message.



Step 2: Select 'Submit This Application Now!'



Now that you have successfully submitted your application, you will see everything is now in submitted status.



Please note: Once an application is in submitted status you will be able to view the information entered. You will not be able to make any changes to the information. However, prior to the due date if you need to make any changes contact First Steps Kent Staff and a submitted application will be allowed to revise.

Printing Options

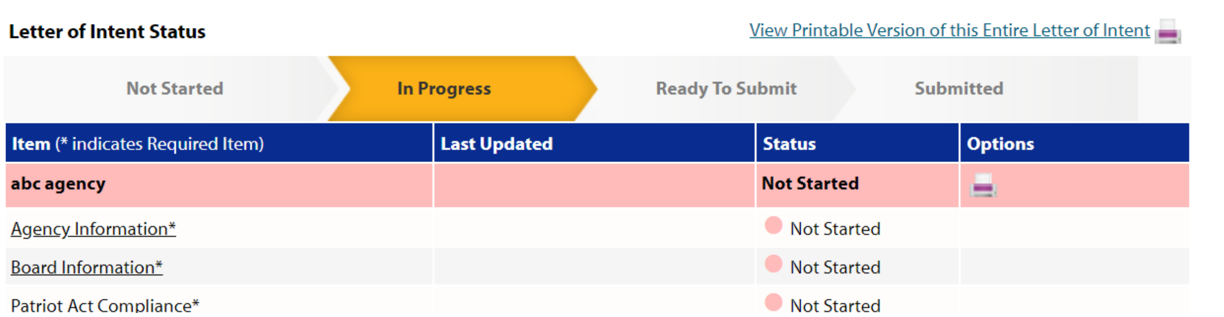
There are different levels you may print:

- The Entire Application – This will print or export all forms within this application.
- Agency Packet – This will print all forms that are agency specific.
- Program Packet– This will print all forms that are program specific.
- Individual Form – This will print the individual form.

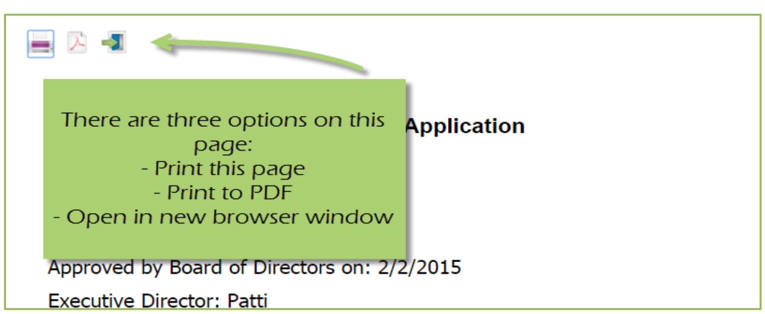
The Entire Application

Step 1: Open the application by clicking on it in the left-hand navigation.

Step 2: Click on 'Print/Review Options' box in the upper right-hand corner of the application main page.

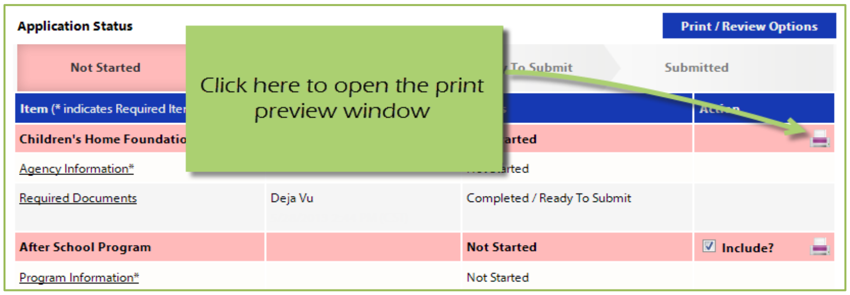


Step 3: Select the option you would like to use, continue on to print.

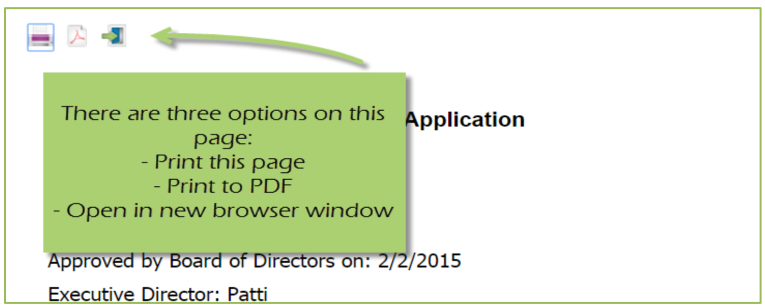


Agency Packet

Step 1: From the application main page, click on the 'Print' icon, in the agency section of the list grid under the action column.

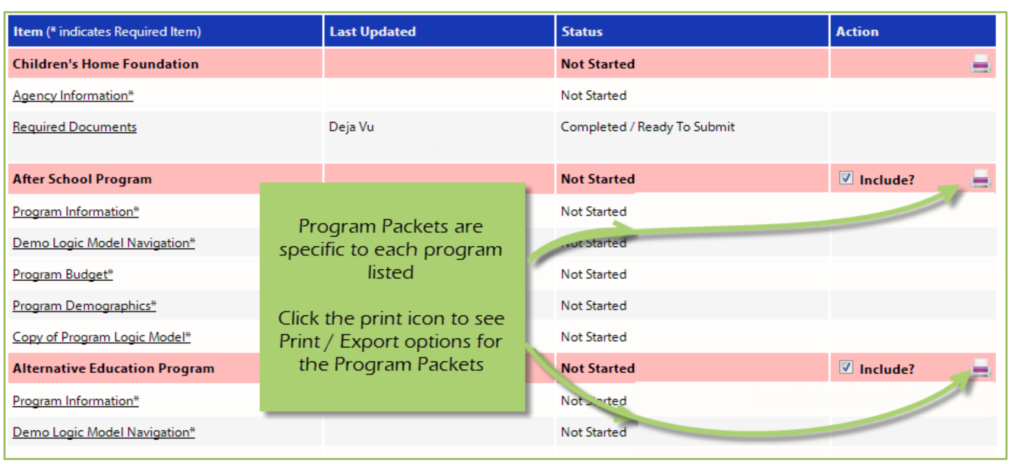


Step 2: Select the 'Print' option you would like to use, continue on to print.



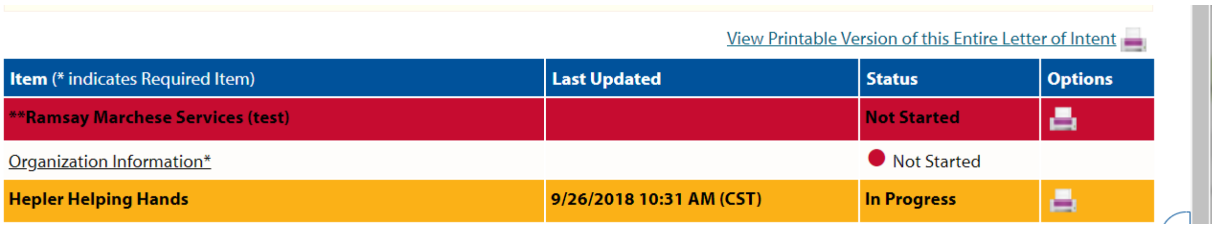
Program Packet

Step 1: From the application main page, click the 'print' icon next to the desired program you would like to print. Then choose which print option to use.



Individual Forms

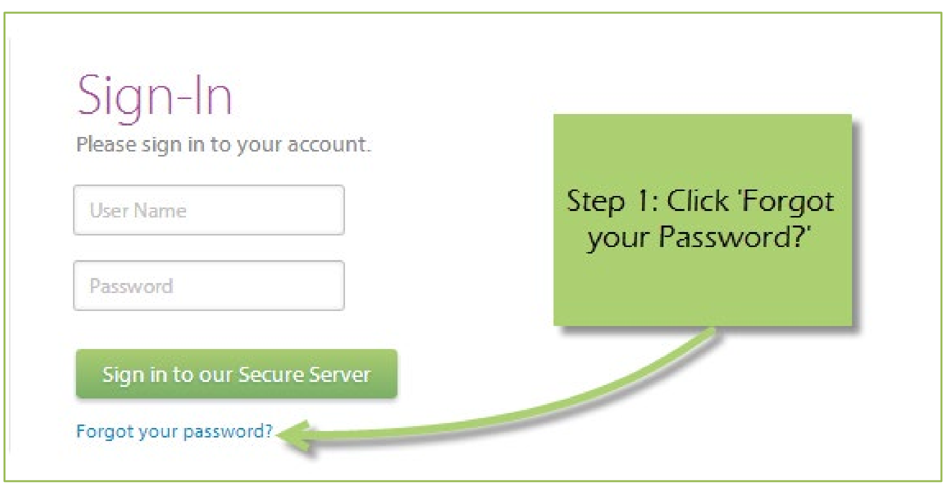
Step 1: From the application main page, open the form you would like to print.



Step 2: In the lower right-hand corner of your form is the option for printing.

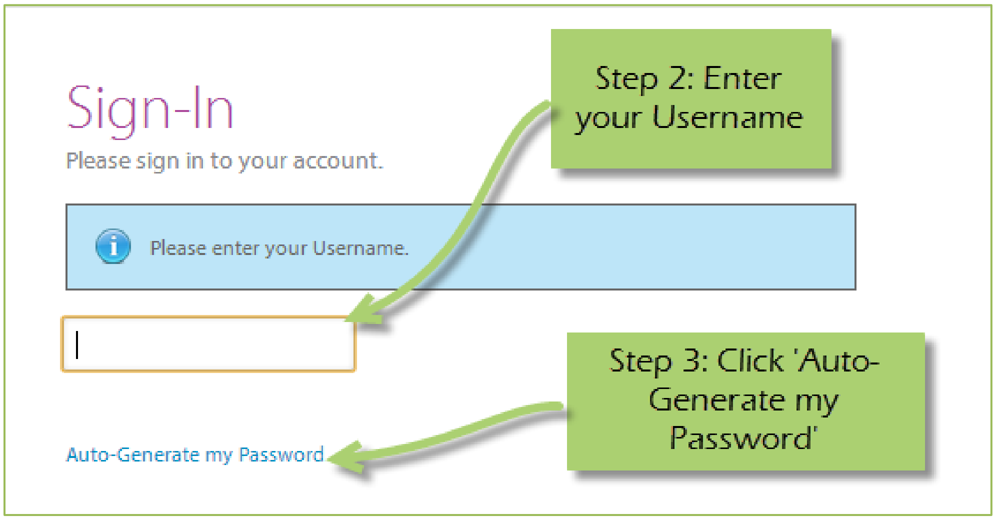
Forgot Password

Step 1: Click 'Forgot your password?' on the agency login page.



Step 2: Enter your username.

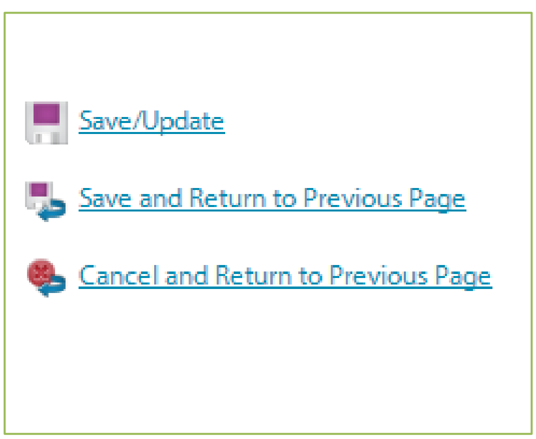
Step 3: Select 'Auto-Generate my Password'.



Step 4: Check your email, return to the login page and procede to login. If you do not see the email in your inbox, be sure to check the 'junk' folder. If the email is not in either, please contact First Steps Kent Staff.

Common Navigation

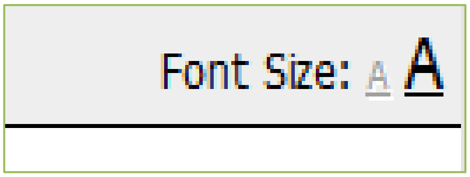
The navigation links in e-CImpact are consistent throughout the site.



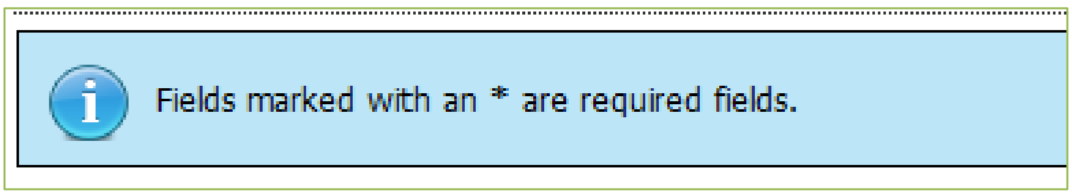
Save/Update: Refreshes the page while saving any changes made to your data.

Save and Return to Previous Page: Returns you to the page last visited while saving any changes made to your data.

Cancel and Return to Previous Page: Will return you to the previous page and will NOT save any changes made to your data.



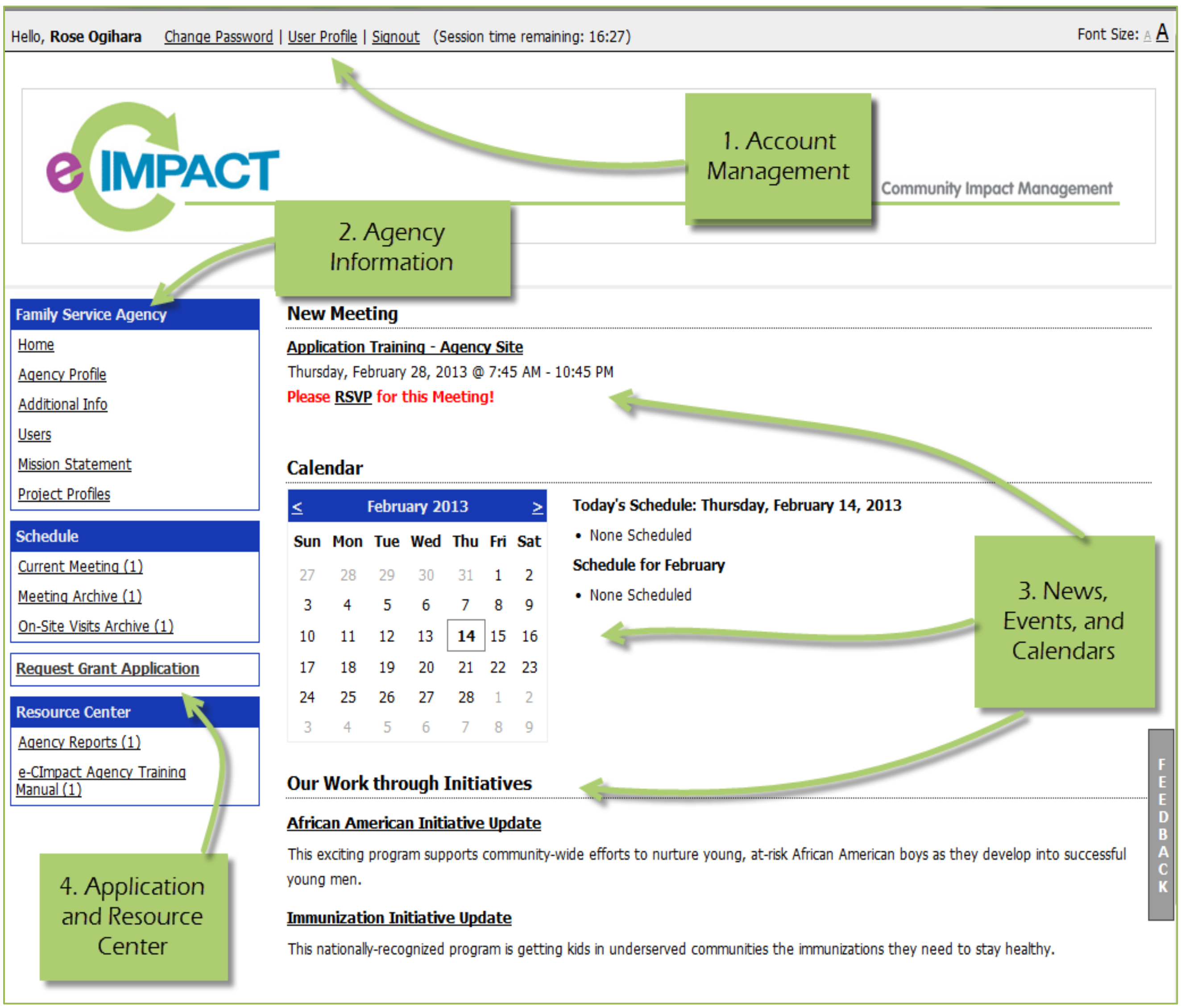
Changing the Font Size: Located in the upper right-hand corner of the agency site, click the large ‘A’ to increase the font size. Click the smaller ‘A’ to decrease the font size.



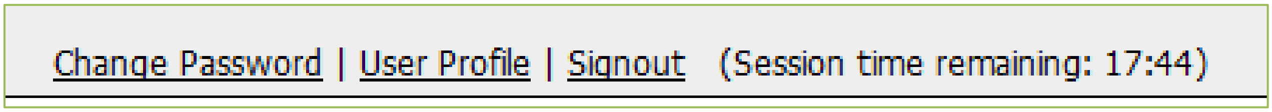
Agency Site Home Page

From the home page you will be able to access all parts of the agency site. There are four basic sections:

1. Account Management
2. Agency Information
3. News, Events, and Calendars
4. Applications and Resource Center



Account Management



Change Password

Step 1: To change your password, select 'Change Password'.

Step 2: Enter the old password.

Step 3: Then enter the new password two times.

Password Rules:

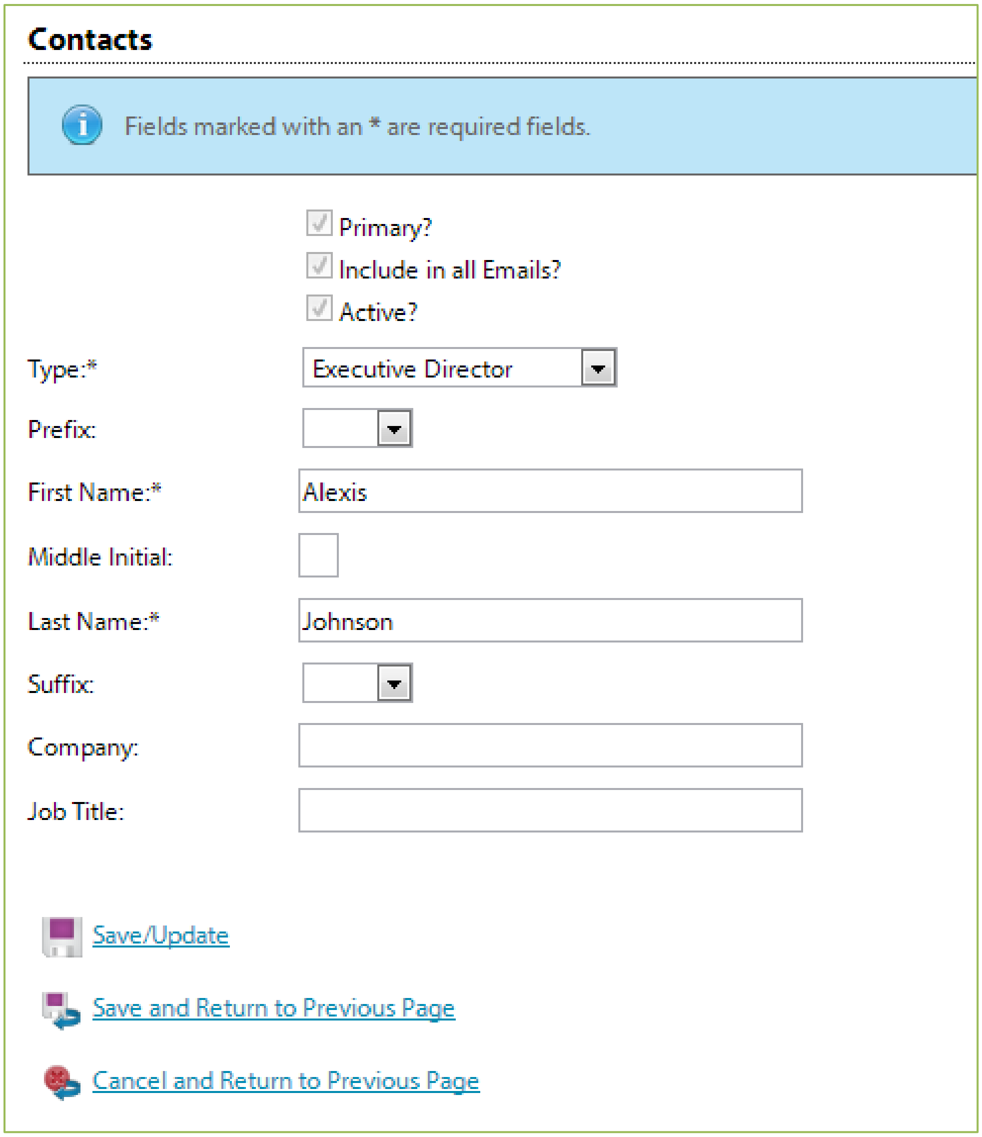
- Must be between 6 and 15 characters.
- Must contain at least 1 character from 2 of the groups of alpha, numeric, or special characters.
- Characters NOT accepted are: ", % or any white-space.

User Profile

The User Profile area is where you are able to add, edit, or delete any of your information including primary contact, basic information, email addresses, phone numbers, and mailing addresses. Users may also choose to be 'Included in all Emails'.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the check box 'Primary?'. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected.

Active: Make sure your account is 'Active'. Once a user is deactivated you will need to contact First Steps Kent Staff to reactivate the user account.



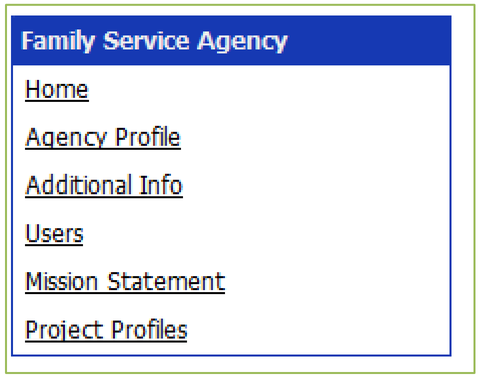
Enter any necessary information, and then click ‘Save/Update’.

Sign out

Users should ‘Sign out’ of e-CImpact to ensure the security of their data. Once signed out of e-CImpact, press the ‘X’ in the upper right-hand corner of your browser to close the window.

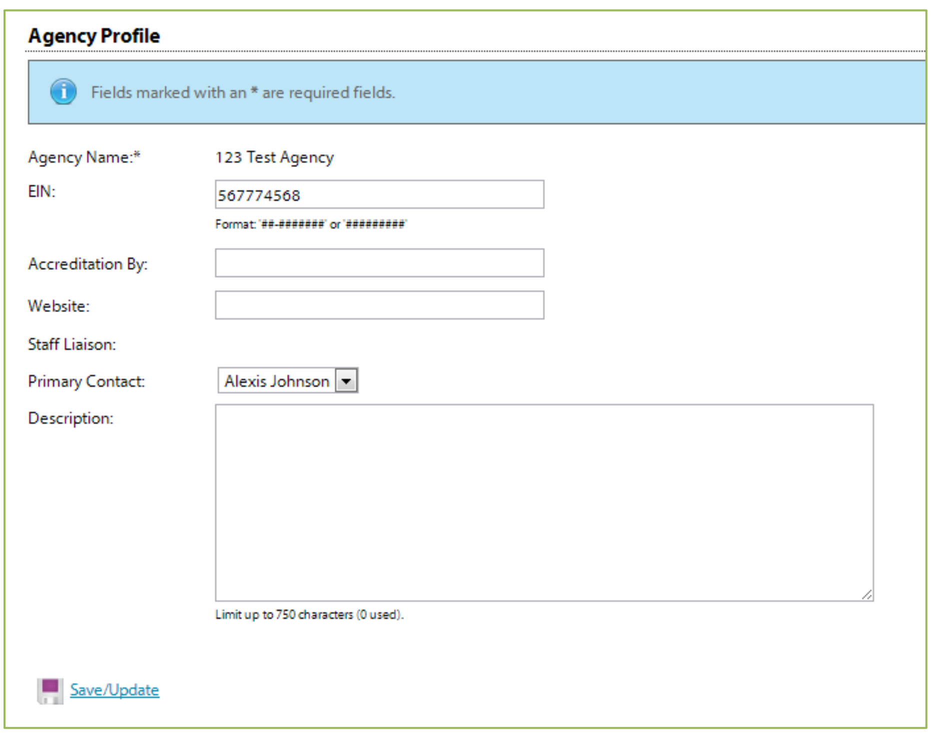
Agency Information

The Agency Information section is where account information, contacts, statements (mission / vision / agency) and program information is housed. From this section you will be able to update your address(es) or contact information.



Agency Profile

The profile page is where all agency specific information is housed and can be updated. This includes the basic information – agency name, EIN, staff contact, primary contact, website, etc.



Account name(s), address(es), phone number(s) and email address(es)

(Note: How to change the Primary Contact information)

You may also add, edit or delete account names, address, phone numbers and email addresses. Agencies are able to have multiple records for each section.

Account Names

Type	Account Name	Active?	Actions

Add New Account Name

Addresses

Type	Address	Primary?	Active?	Actions
Mailing	123 Main Street, City, IL 45654, U.S.A.	Yes	Yes	Edit Delete

Add New Address

Phone Numbers

Type	Phone Number	Primary?	Active?	Actions
Fax	(555) 666-3333	Yes	Yes	Edit Delete

Add New Phone Number

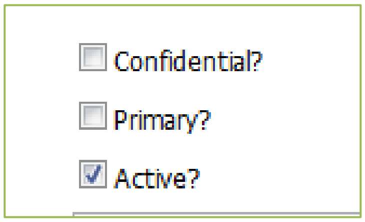
Email Addresses

Type	Email Address	Primary?	Active?	Actions
Main	info@email.com	Yes	Yes	Edit Delete

Add New Email Address

<u>'Account Names'</u> is a place for any other names for your agency, or if your agency name is abbreviated you may place the legal name here.

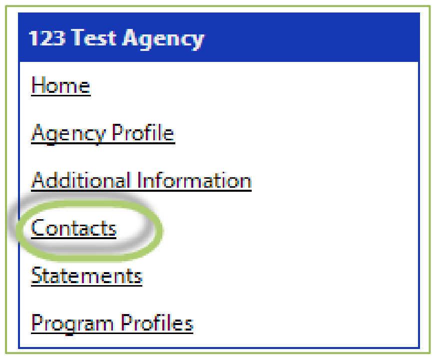
Agency Contacts



When adding a new record, or updating existing records, be sure to select ‘Active’ appropriately.

‘Primary’ can only be selected for one record.

To view all agency contacts – click ‘Contacts’ from the agency information section on the homepage.



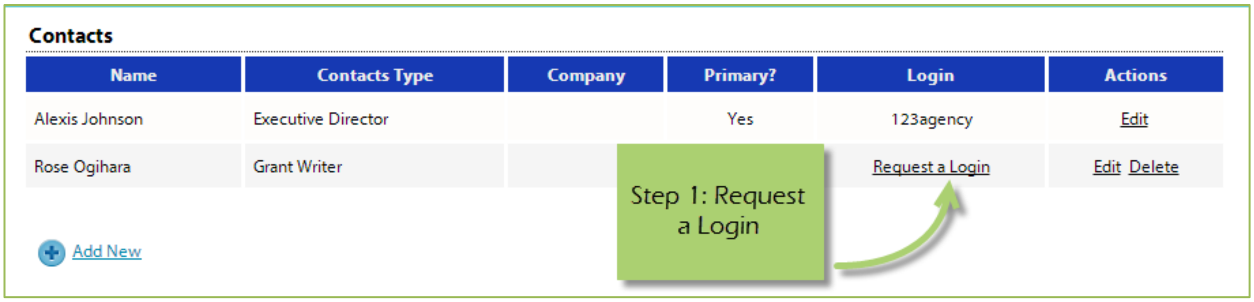
From this area you will be able to see anyone who is currently listed as a contact at your agency, as well as add, edit, deactivate or delete an agency contact.

The agency contact profile page is similar to the user profile and contains the same information.

- Name and preference
- Email addresses
- Phone Numbers
- Addresses

Request a Login: Once a new contact has been created, you are able to request a login for this user.

Step 1: Click 'Request a Login'



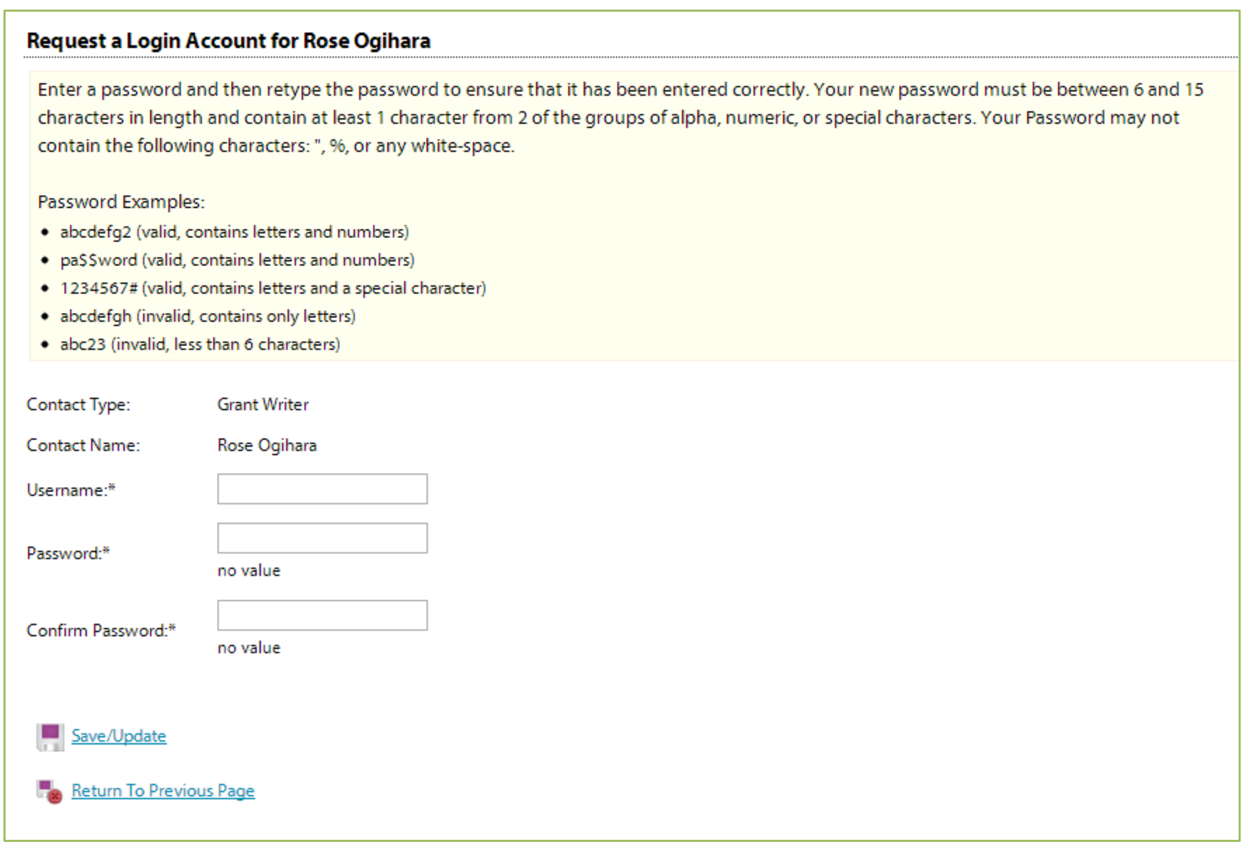
Contacts

Name	Contacts Type	Company	Primary?	Login	Actions
Alexis Johnson	Executive Director		Yes	123agency	Edit
Rose Ogihara	Grant Writer			Request a Login	Edit Delete

Add New

Step 2: Enter username and password.

**A contact's email address is commonly used as the username due to email addresses being unique.*



Request a Login Account for Rose Ogihara

Enter a password and then retype the password to ensure that it has been entered correctly. Your new password must be between 6 and 15 characters in length and contain at least 1 character from 2 of the groups of alpha, numeric, or special characters. Your Password may not contain the following characters: ", %, or any white-space.

Password Examples:

- abcdefg2 (valid, contains letters and numbers)
- pa$$word (valid, contains letters and numbers)
- 1234567# (valid, contains letters and a special character)
- abcdefgh (invalid, contains only letters)
- abc23 (invalid, less than 6 characters)

Contact Type: Grant Writer

Contact Name: Rose Ogihara

Username:*

Password:*

no value

Confirm Password:*

no value

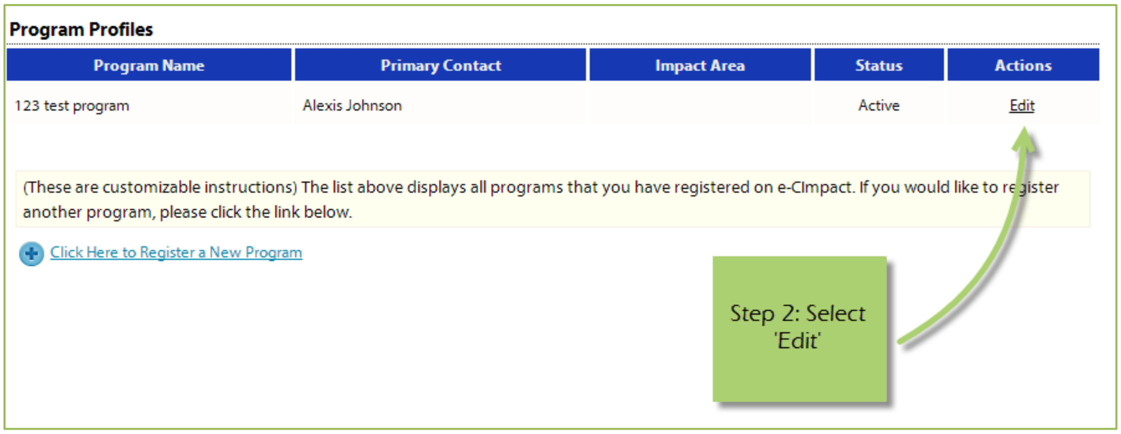
Save/Update

Return To Previous Page

Updating Program Information

Step 1: To edit or inactivate a program, go to the program profiles area.

Step 2: Select 'Edit' next to the desired program.



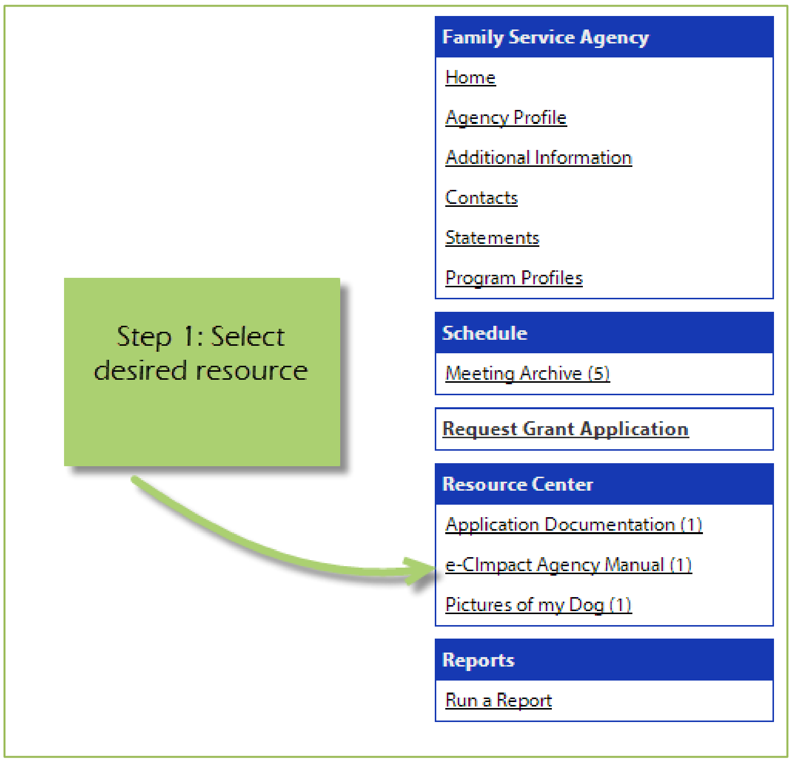
From here you will be able to update or inactivate information needed.

Resource Center

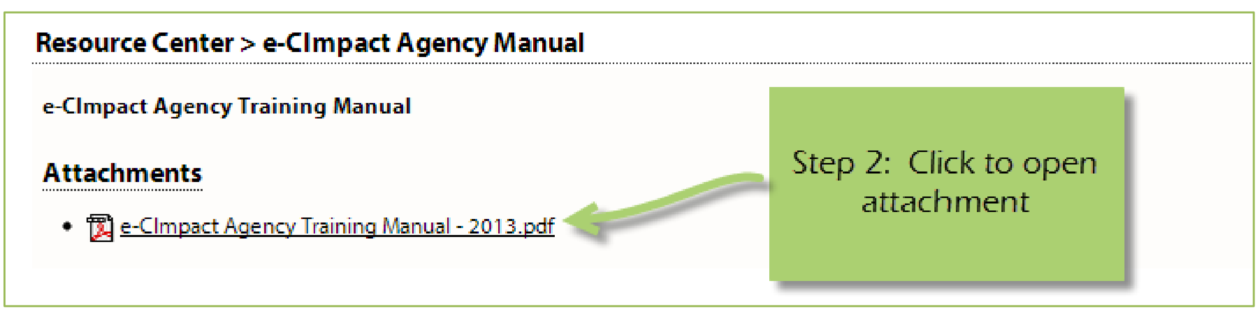
The agency resource center is where you will be able to find any documents you may need to reference from First Steps Kent. The resource center is located in the lower half of the left-hand navigation.

Accessing Resources

Step 1: Select desired resource item.



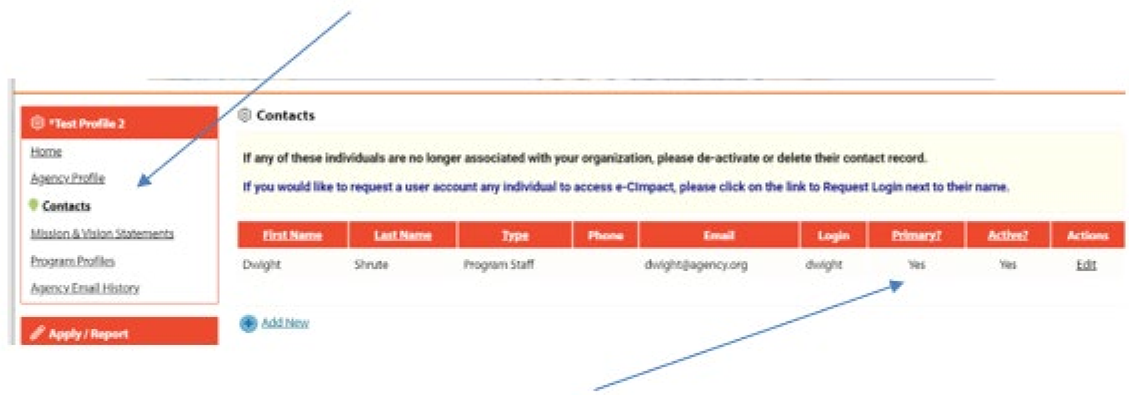
Step 2: Click on the attachment link to open.



Request for Proposals – Responding to Questions (New!)

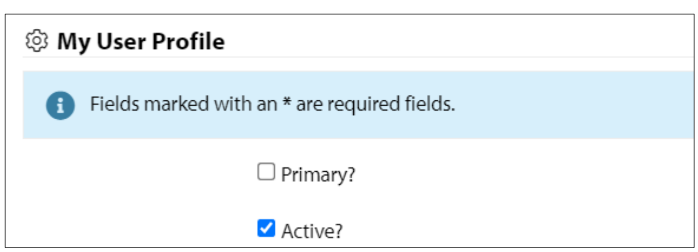
Your Primary Contact will receive notifications about questions being posted related to proposals submitted in e-CImpact. To confirm who the Primary Contact is at your agency and that complete information has been provided, it is recommended you check your Primary Contact information.

Once logged in, select “Contacts”.



The names and contact information for all individuals associated with your agency will appear. The Primary will be acknowledged where a ‘Yes” appears under the ‘Primary?’ column.

The Primary Contact may be modified by selecting the ‘Primary’ box in at the top of the profile. Note: there can only be one individual per agency designated a Primary Contact.



Note: See page 37 of this e-CImpact Training Manual for additional information regarding User Profiles.

Reviewing Questions

As questions about the submitted proposals are sent to each agency, two things will happen:

1) The Primary Contact will receive an email from the e-CImpact System Administrator with this type of information:

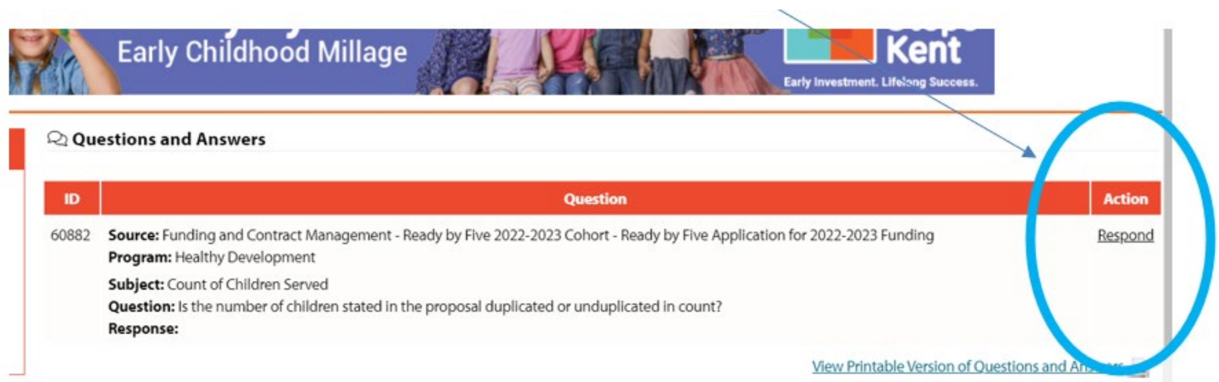
> Dear Dwight,
>
> Please login to e-CImpact: https://agency.e-cimpact.com/login.aspx?org=FirstStepsKent
>
> Your response is requested to the following question regarding Funding and Contract Management - Ready by Five 2022-2023 Cohort - Ready by Five Application for 2022-2023 Funding:
>
> Agency: *Test Profile 2
> Program: Healthy Development
>
> Subject: Partnership
> Question: How many OBGYN Offices are referrals coming from?
>
> Comment :
> Thank you -
>
> First Steps Kent
> https://www.firststepskent.org/

2) All users may log in and see that the questions will be visible to all registered contacts under the ‘Questions and Answers’ link. All users will be able to contribute answers to questions.

Submitting Responses to Questions

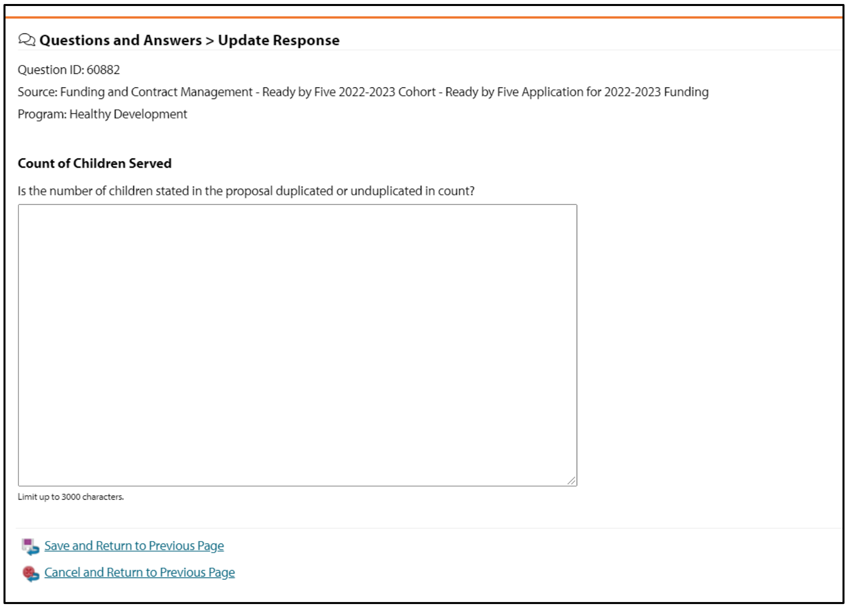
All questions will be posted in this location. Answers may be reviewed and updated by all agency users. If your agency submitted more than one proposal, be sure to note what question is assigned to each proposal by noting the program name listed in each question and additional details provided in the content of the question.

Step 1: All users may access and respond to a specific question by clicking the "Respond" link next to the corresponding question.



Step 2: Include your agency's response in field provided

Step 3: Click 'Save and Return to Previous Page' to submit your answer. Your answer has been submitted!



Submitting Quarterly Reports Through e-CImpact

The quarterly report is broken down by sections: services, parent satisfaction surveys, and narratives. There is also an ability to attach documents or files. Below is a step-by-step guide on how to complete your quarterly report in e-Cimpact.

1. Login to your agency and choose the "2022 - Quarter One Report" option in the Apply/Report section under the appropriate cohort, 2021-2022 or 2022-2023. This link will change to correspond to future quarters.

2. Start by selecting the “Quarterly Report – Services” link to fill in your program’s numbers. Please note, refer to the table(s) in your Service Provider Agreement or amendment, for year 2021-2022. These are found in Exhibit A, section 2, “Individuals to be Served” in the Service Provider Agreements. The typical table is broken down by “Individuals Served” and “Number of Encounters” but refer to your specific contract or amendment as these indicators are not universal. See example below:

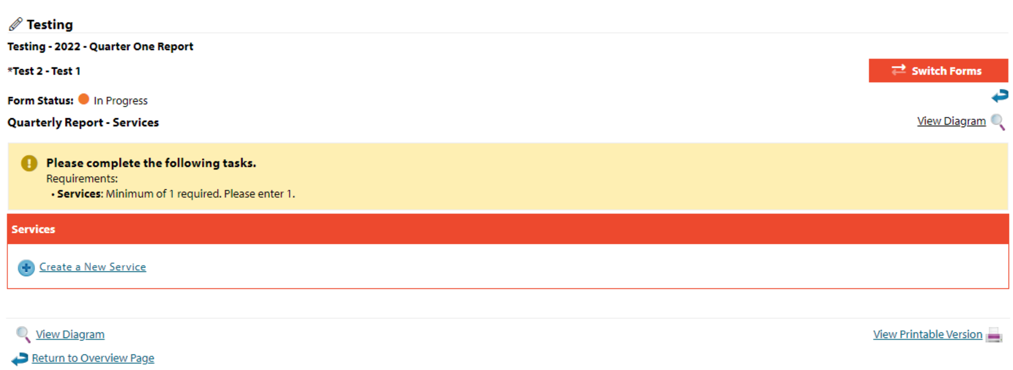
Service	Number of Individuals to be Reached through Outreach	
	Year 1	Year 2
Outreach, Screening and Navigation Services	100	200
	Number of: Individuals Screened	
	Year 1	Year 2
	50	100
	Number of : Individuals Receiving Navigation	
	Year 1	Year 2
	20	40

Result Indicator

Result Indicator

Result Indicator

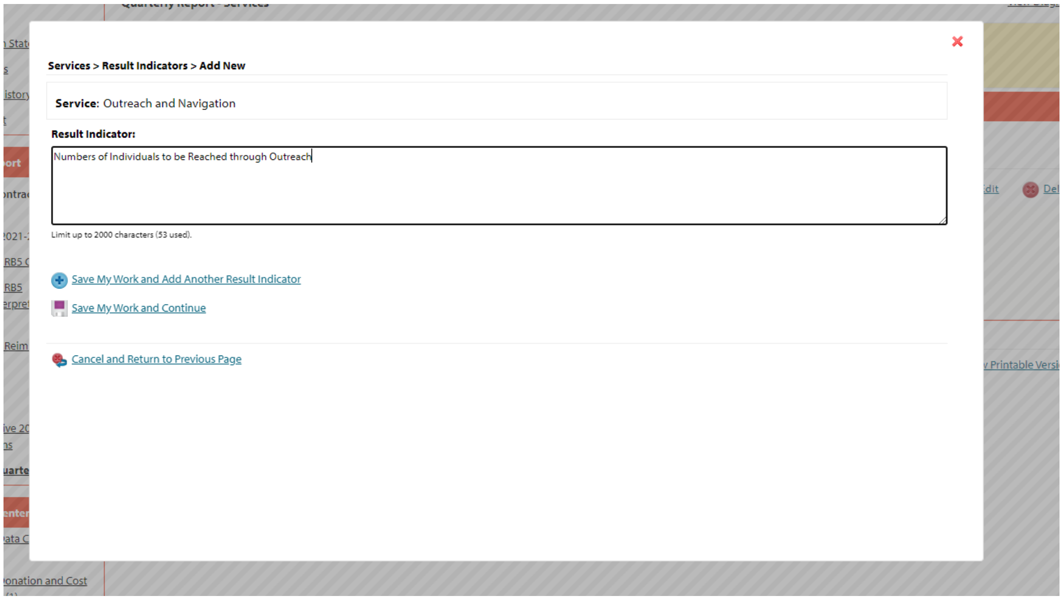
3. Select the “Create a New Service” link and fill in the service for your table. This service will be what is on the left side of your Service Provider Agreement’s number of individuals and encounter table.



4. Input your result indicators. The result indicators can be found in Exhibit A, section 2, “Individuals to be Served,” section in your Service Provider Agreement.

To add additional result indicators, select “Save My Work and Add Another Result Indicator.”

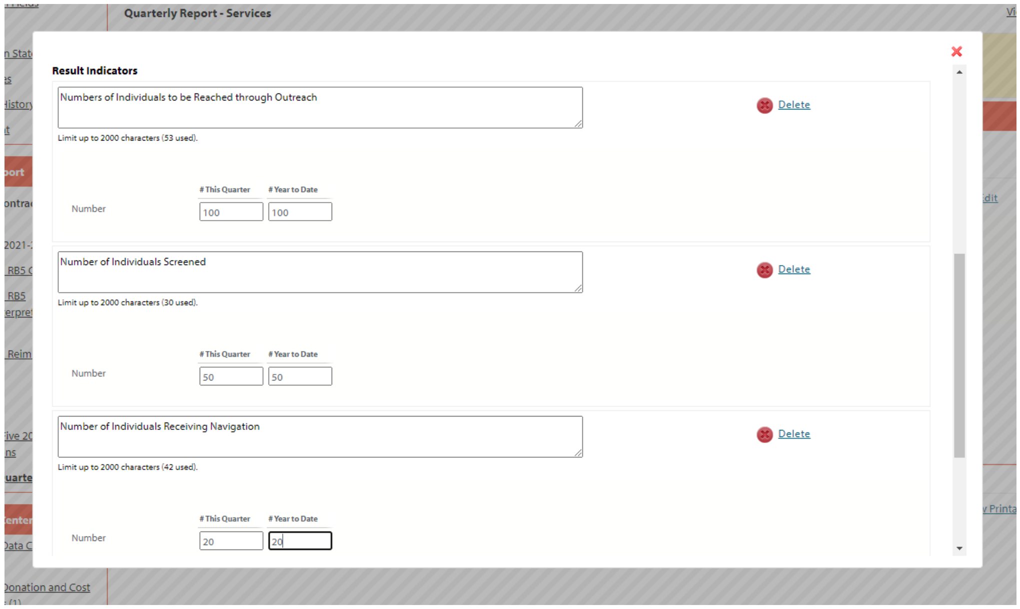
When you are on your last result indicator select “Save my Work and Continue.”



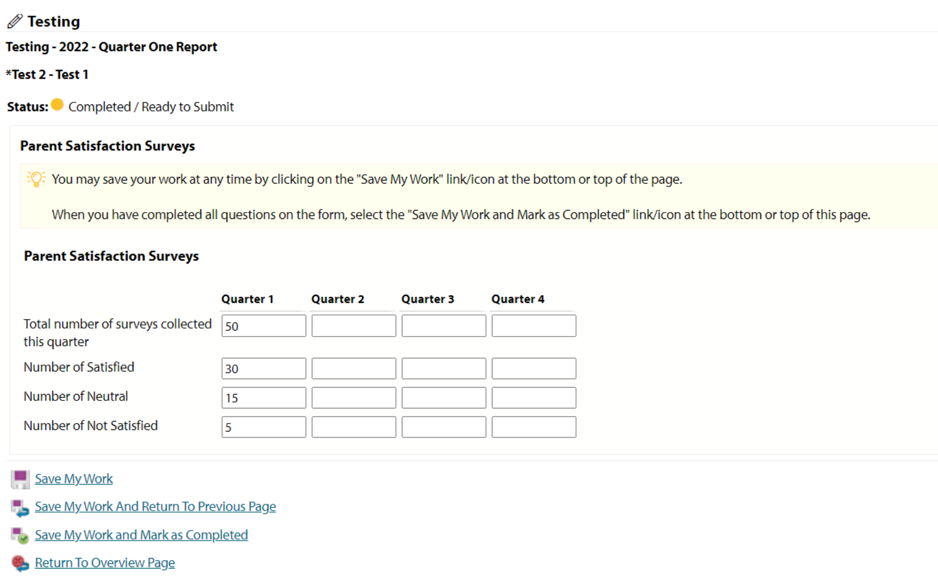
5. When you have completed entering your result indicators for the service, input the relevant numbers for this quarter and the year-to-date number.

   These numbers you are expected to meet for the year can be found in Exhibit A, section 2, “Individuals to be Served,” in your Service Provider Agreement.

   You will also be given an opportunity, in a narrative box, to explain the numbers.



6. Mark your work as saved and complete. If you have another table to fill out, you can create another by selecting the “Create New Service” option at the top. Once finished with this section. Mark your work as saved and submit for that section.
7. Proceed to the “Parent Satisfaction Surveys” section. For this section, in the appropriate quarter, fill out the column. You will put how many total surveys you received and then break them down by the categories.



8. The next section is the narrative section. Please respond to all questions. Click “Save and Mark as Complete” when done.
9. The last section is for relevant attachments. There are eight spaces for documents or files. If you have no attachments, please go in and “Save/Upload Attachment(s) and Mark as Completed.”
10. Once all your sections have the status of “Completed / Ready To Submit”, you are able to submit your report.