

United Way California Capital Region

# User Manual

MIS 161 - Team 5

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# User Manual

This user manual describes the process of filling out an application for United Way online. It goes through each step of the application with a brief description of each requirement. This manual also goes through the Administrator side of the application process. It goes through how an Admin for United Way can review submitted applications, modify automated emails, and search for applications through various ways.

## Agency User Manual

### Register

The application website begins at a page where you have the options to login or register underneath the header. If you are a new agency then you will need to click on the **Register** tab. The registration page looks like this:

UNITED WAY CALIFORNIA CAPITAL REGION

REGISTER LOGIN ACCOUNT RECOVERY

UNITED WAY USER REGISTRATION

Agency Name

EIN

Address

City

State

State is not editable. Address must be the address of the agency's local chapter in California

Zip

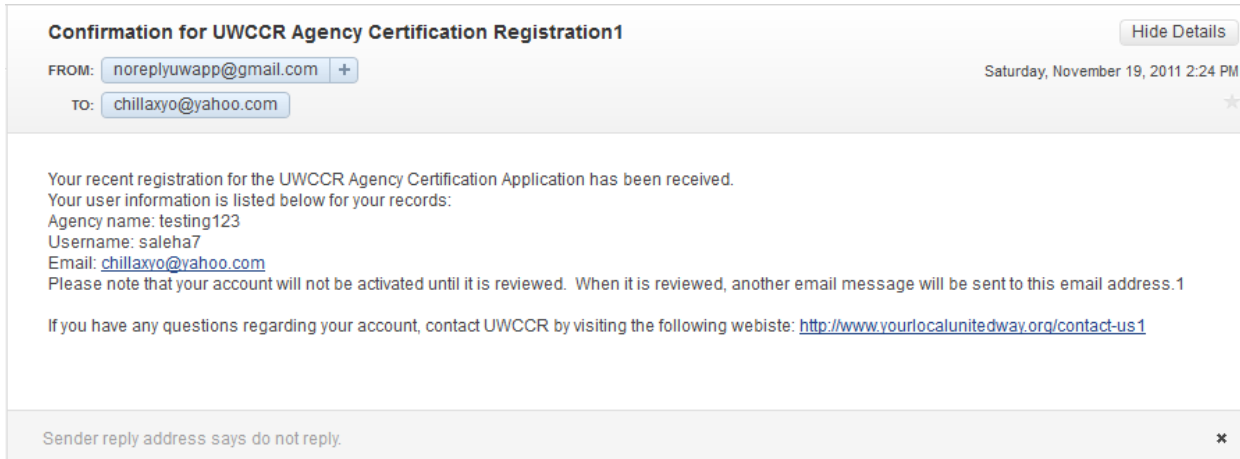
Phone #

Fax #

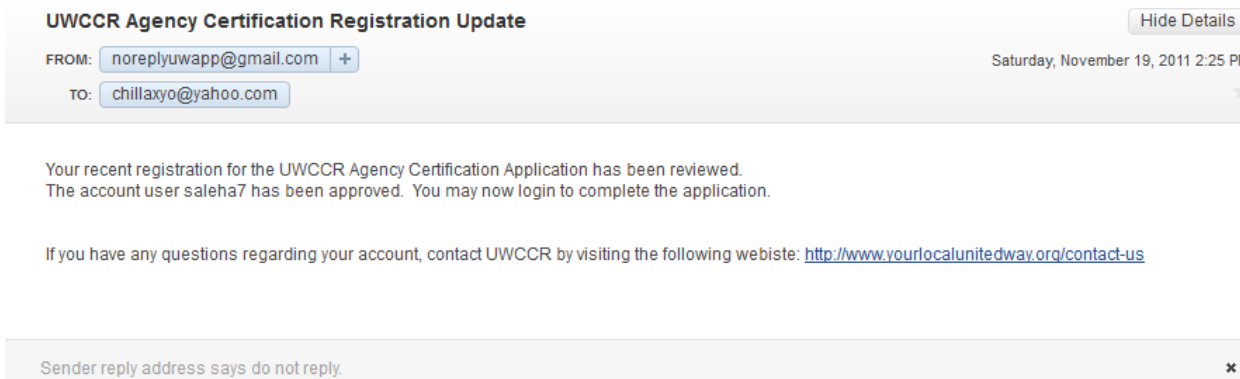
Agency's Email

(Please be aware that this email address will be used for all future correspondence)

After you fill out the required information for registering, you will be sent an email that looks like this.



Once the admin manually approves your information, you will be sent another email that looks like this.



At this point you are now able to log in.

*\* In the case you forget your username or password; you may click on the **account recovery** tab and follow the instructions to get your information back.*

### Fill out Application

Now you can click on the tab that says “**Log in**” and fill out your username and password. Once you get through, you will see your homepage.

Click on the “Application” tab to begin your application. This will lead you to a page that shows you your application status as well as a key to show you what that status means. Here you may also view whether your attachments have been received by the admin from your application. Click on the button that says “**Start New application**” to fill out a new application.

Here you will see the following tab pages.



The **Introduction** tab briefly gives you some information about the application as well as what some of the attachments require and what they are about.

The **Fact Sheet** tab includes basic information about your agency. When you are finished filling this out, click on the **save application sheet** button before going on the next tab. The required parts have a red asterisk (\*) next to them.

The **Partnership agreement** tab requires knowing if you are filling out a partnership agreement. If you are, please select yes and follow the instructions on mailing the agreement form to our office.

**CFC** tab stands for Combined Federal Campaign which is another program you may apply for. If you plan on doing so, please select yes and follow the instructions on mailing this form in.

**CSECC** tab is the California State Employees Charitable Campaign Pledge Form which you will also have to mail in if you select yes.

**Attachment A** tab is a form that you fill out and when you are finished you should click Save attachment A to save your information on that tab. A brief description on Attachment A is also listed on this page.

*\*If you would like to change your fact sheet info, please go to the fact sheet tab and change the info there and save it. The information will automatically update when you return to the Attachment A tab.*

**Attachment B,C,D** are tax forms in which there is a brief description and also two options on whether you would like to mail the form in OR scan a copy and upload that copy to the online application. If you would like to upload, select upload and on the summary tab you will be able to upload your documents.

**Attachments E, F, G** are forms in which you can fill out the information needed and there is also a brief description of each requirement for their respective sections.

*\*For attachment G, if there are more than 5 board of directors that you need to list, you can simply upload a scanned document listing that on the summary tab or mail it in to our office.*

The **Summary tab** lets you know whether or not you have completed all of the required information. There should also be an upload button in which you can upload your attachments. If you do not see this and would like to upload, please go back to the attachment tabs and make sure you selected the option to upload. You can also see instructions on the right hand side that will tell you what you will need to do according to what option you have chosen (mail or upload).

### **How to save your work**

Most of the tab pages have buttons on the bottom of the page to save your work. The tabs that do not have this automatically save your selection once you select it. You can always go back and change your work and also review your work on the summary tab. You can also save your work and log out at any time and log back in to resume your application.

When finished with the application, please click **submit application** on the summary tab. The application should then be processed and reviewed. The next time you log in, you should see an application status on your homepage that tells you if the application is approved or whether or not we will need additional documents or information.

## FAQ – Frequently Asked Questions

**Q: How do I start my application process?**

A: You may first register by clicking on the **Register** tab and entering in your information. We will send you an email confirmation and you will be able to log in and begin your application from there.

**Q: I'm not finished with my application but I would like to log out. Will my information be saved?**

A: Yes. You are able to log in at any time and resume your application. Your application status will also say **"In Progress"**. Be sure to check all tabs and click **"Save"** where it is needed to confirm your application is saved.

**Q: Which fields are required on the Fact Sheet?**

A: The fields that are required have a red asterisk next to them. If you click **"Save Fact Sheet"**, you will be able to see which fields are required as the page will not let you save until these fields are filled out.

**Q: Where can I get more information on how to fill out the required Attachments?**

A: On the **Introduction** tab of the application you will be able to see a thorough description on how to fill out each attachment.

**Q: Where do I mail in my documents if I select the option to mail it in?**

A: On the **Summary** tab, there is an address listed in the section in which you selected you will mail in your document/s. Please follow those instructions and mail it to the United Way office when you have submitted your application.

**Q: I am an administrator for United Way however I cannot log in. Why is this happening?**

A: Please be sure to select the checkbox **"Admin"** before logging in. This should solve your problem.

**Q: I am an administrator for United Way. I would like to add more admin accounts to help review applications. How do I do this?**

A: Under the tab **Admin Functions**, please select **Staff Account Creation**. This option will allow you to create a username and password for your fellow employees to help out.

**Q: I am an administrator for United Way. How will the Agency know that I approved their application?**

A: When you click **"Submit"** on the **Review Submitted Applications** tab page, an email will be sent to the agency notifying them of their status. An email will also be sent if the application is denied, incomplete, etc.