2020-2023
Community Impact Grant
Application Training Manual
How to access the e-CImpact Agency Site & complete the online application

For support, contact:
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Welcome

Maui United Way’s (MUW) e-CImpact Agency Site Training Manual.

e-CImpact is an online program designed to efficiently collect information and data. Aloha United Way is the license holder of e-CImpact and Maui United Way is the sublicensee of their account. With that said, you will see Aloha United Way listed on some pages of the site. MUW will be using e-CImpact as a tool throughout the year by accepting Community Impact Grant Applications, Semi-Annual Reports, and collecting General Agency Demographics & Statistics. Agencies have access to their personalized and secure website containing information associated specifically for them. The entire process is managed through the administrator permission-based online view, enabling users at your organization to access the system from anywhere with a computer and an internet connection.

The purpose of this training manual is to assist agencies with the online application of the Community Impact Grant Allocation Process.

Any questions about the overall process you may contact:

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Accessing e-CImpact

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, and Safari)

To access the e-CImpact website, please go to:


Please bookmark the address to easily access e-CImpact at your convenience.
Registering a New Agency
If you are not a current Maui United Way Partner Agency, please proceed with site registration. Registration is required for all agencies who are not current MUW Partner Agencies.

Step 1: From the agency login page select ‘Create New Account’
Step 2: Please read the welcome page carefully, and then click ‘Next’ to continue with your registration process.

Maui United Way is pleased to announce that our
Community Impact Grant for 2020-2023 application
will open at 9:00 am on Tuesday, January 28th, 2020.

Applications are due at 4:00 pm on Wednesday, March 4th, 2020.

**Tips and Resources**

1. The Application Manual is live! Click here to access the application manual. This resource provides a full walkthrough of the entire application process.
2. Have the required documents listed below. All required attachments must be uploaded in order to submit your application.

**Application Contents**

There are two parts that make up the MUW Community Impact Grant Application:

**Part 1:**
1. Agency Information
2. Attachments- Required Documents

**Part 2:**
1. Application and Program Contact Information
2. Funding Category Selection
3. Executive Summary
4. Description of Need and Target Population
5. Program Description
6. Organization’s Experience and Capability
7. Program Objectives and Performance Measurement
8. Cost Effectiveness, Budget Reasonableness, Scalability
9. Financial Information
10. Grant Conditions Agreement/Senior Executive Signature

Read message carefully, and then click “Next” at the bottom of the page to begin the application process (not pictured)

**Required Documents**

Please have the documents listed below before you begin the application in order to expedite this process. All attachments must be uploaded in order to submit your application.

1. IRS 501(c)(3) Determination Letter* - Attach a copy of the agency’s IRS 501(c)(3) tax exemption letter showing your IRS Employer Identification Number. Scroll over (?) for additional information about group exemption or DBA names.

2. State of Hawaii Department of Commerce and Consumer Affairs* - Upload a copy of the agency’s Certificate of Good Standing or Company Information. Visit the DCCA website to obtain a free online copy of company information. See page 25-26 of this manual for more detailed information.

https://hbe.hawaii.gov/documents/search.html
Step 3: Please enter the agency Employer Identification Number (EIN) and click “Next”.

*EIN – the system will automatically validate your EIN, confirming you do not already have an e-CImpact account. The system will also automatically enter any information linked to the EIN entered.
**Step 4:** Enter all the required information regarding your agency. Username should be your email address.

Please note what username and password you create.

Step 4: Enter required information, then click “Next”.
**Step 5:** Select the application and then continue to the next page.

*Maui United Way Open Applications*

Please select the appropriate application and click on the green “Continue” button to begin the application process.

*Maui United Way Investments*

*MUW Community Impact Grant App*

**Step 5: Select Application and click “Next”**

*Cancel and Return to Login Page*

**Step 6:** Complete the “Certification & Compliance” page. You must select “I certify” for all seven certifications in order to move on to the application.

**Certification & Compliance**

Fields marked with an * are required fields.

By selecting “I certify” from the drop down list, you are certifying that all of the following information is true to the best of your knowledge:

**Certifications #1: Tax Exemption under 26 U.S.C.501 (c)(3)**

1. That the internal Revenue Service recognizes the agency named in this application as tax exempt under 26 U.S.C.501 (c)(3) & that the contributions are tax deductible pursuant to 26 U.S.C 170.

If this is your agency’s first time applying for Maui United Way funding, please make sure to attach your IRS 501 (c)(3) Determination Letter in the Attachments section at the end of this application.

Scroll over (?) for additional information.

**Step 6: If True, select “I certify” from drop down menu and click “next” when finished.**
Step 7: Review all agency information entered, and then click ‘Complete Registration’.

Agency Registration Confirmation Page: Once your registration is completed you will be able to print your confirmation page. You will also receive a confirmation email.
Agency Registration Approval: All agencies are automatically approved in the e-CImpact system. Click on “NEXT” at the bottom of the page to start the application.

Agency Login
Now that you have accessed your Agency site, it is time to log in.

Please enter your username and password then click on “Sign in to our Secure Server”.

If you do not know or remember your username and password, please contact Makana Nunes. If you have your username but have forgotten your password please see page 12 for instructions on how to reset the password.

Step 1: Enter your username and password
Step 2: Click ‘Sign In to our Secure Server’ or use the enter key.

Forgotten 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 proceed to login. If you do not see the email in your inbox, be sure to check your ‘junk or spam’ folder. If the email is not in either, please contact Makana Nunes.
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. Applications and Reports
4. 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’. Enter any necessary information, and then click ‘Save/Update’.

Primary Contact: There can only be one primary contact per agency. This can be set by selecting the checkbox “Primary?”. The primary contact is automatically included in all emails and cannot be deactivated unless a new primary contact is selected. This individual is likely to complete the annual application, reports and manages contact information or other administrative tasks/functions. In many cases, this is not the Executive Director. This person is Maui United Way's point of contact for general correspondence.

Include in all Emails: This allows users to receive all emails sent through e-C1mpact. Users who do not select ‘Include in all Emails?’ will only receive emails that are appropriate for their position.

Active: Make sure your account is ‘Active’. Once a user is deactivated you will need to contact Makana Nunes to reactivate the user account.

Agency Information
The Agency Information section is where account information, contacts, statements (mission/vision/agency) and program information are 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)**

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

‘Account Names’ 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’
**Step 2:** Enter the username and password.
**Common Navigation**
The navigation links in e-CImpact are consistent throughout the site.

- **Save My Work:** Refreshes the page while saving any changes made to your data.
- **Save My Work and Return to Previous Page:** Returns you to the page last visited while saving any changes made to your data.
- **Save My Work and Mark as Complete:** Upon completion of each section of the application, this must be selected before you are able to submit your application.
- **Return to Overview 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.

**Context-Sensitive Help:** Any time you see this green question mark, scroll over for additional information about the section.

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**Fields marked with an * are required fields.**
Basics of the Application

Accessing the Application

Step 1: Choose the application from the list located in the left-hand navigation.

<table>
<thead>
<tr>
<th>Apply / Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maui United Way Investments</td>
</tr>
<tr>
<td>MUW Community Impact Grant App</td>
</tr>
<tr>
<td>MUW Community Impact Grant App (2020-2023)</td>
</tr>
</tbody>
</table>

Step 1: Choose application listed in the left hand navigation tree under:

Step 2: If applying for the same program that is currently funded by MUW, you must select that program from the Drop Down list. If applying for a new program, you must assign a new one.

Step 2: Click here to Create New or Assign Current Program to Application.
Step 6: Click “Continue” and proceed to the full application.

Confirmation

Thank you, your request has been submitted. An e-mail confirmation has been sent to you.

Agency Name: MAUI FOOD BANK INC
Program Name: Feeding the Needy
Request For Participation In: MUW Community Impact Grant App (2020-2023)
Successfully Submitted On: 1/8/2020 4:45:32 PM
Status: Approved to participate in Application Process
Form Status

This page works much like a checklist. You are able to easily see how much of the 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 the 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 Makana Nunes.

**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.

**Application Process**

There are two parts of the application that you will need to complete in order to submit your Community Impact Grant application. All sections must be saved and marked as completed before being able to submit the application. Please note, once you have submitted your application you will no longer have the ability to modify it.

**Part 1: Agency Information & Attachments - Required Documents**

Fill in all requested information. Some of the fields have been pre-populated with the information provided by your agency profile. Even though the fields are pre-populated you are still able to make changes directly in this form. All fields have to be completed.
before you are able to Save My Work and Mark as Completed, if not you will have to Save My Work And Return to the Previous Page.

**Required Documents:**

1. **IRS 501(c)(3) Determination Letter***
   Attach a copy of the agency's IRS 501(c)(3) tax exemption letter showing your IRS Employer Identification Number. Scroll over (?) for additional information about group exemption or DBA names.

2. **State of Hawaii Department of Commerce and Consumer Affairs***
   Upload a copy of the agency's Certificate of Good Standing or Company Information Visit the DCCA website to obtain a free online copy of company information: See page 25-26 of this manual for more detailed information.
   
   [https://hbe.ehawaii.gov/documents/search.html](https://hbe.ehawaii.gov/documents/search.html)

3. **State of Hawaii Attorney General's Office***
   Upload a copy of the agency's Registration - Visit the State of Hawaii Department of the Attorney General's Office to obtain a free copy of the Agency's Registration: See page 27-28 of this manual for more detailed information.
   
   [https://ag.ehawaii.gov/charity/search.html](https://ag.ehawaii.gov/charity/search.html)

4. **IRS Form 990 & All Schedules - Current Year***
   Attach a copy of the agency's most recently completed IRS Form 990 including all applicable schedules.
   If your agency does not file a Form 990, please attach a copy of the agency's most recently completed IRS Form 990EZ or Form 990N (postcard).

5. **IRS Form 990 & All Schedules - Year 2 (prior to current year)**
   Attach a copy of the agency's Year 2 (the year prior to the most current year) completed IRS Form 990 including the signature of an officer and all applicable schedules.
If your agency does not file a Form 990, please attach a copy of the agency's Year 2 (the year prior to the most current year) completed IRS Form 990EZ or Form 990N (postcard).
If your agency hasn't been in operation for two years, only provide the financial information for the current year.

6. **IRS Form 990 & All Schedules - Year 3 (least current financials)**
   Attach a copy of the agency's Year 3 (the year prior to Year 2) completed IRS Form 990 including the signature of an officer and all applicable schedules.

   If your agency does not file a Form 990, please attach a copy of the agency's Year 3 (the year prior to Year 2) completed IRS Form 990EZ or Form 990N (postcard).

   If your agency hasn't been in operation for three years, only provide the financial information for the current year and Year 2.

7. **Audit & Management Letter or Independent Financial Review**
   Audit or Independent Financial Review must not predate the financial information in Section 6.

   If agency revenues exceed $500,000, please attach your agency’s Audit and Management Letter (if applicable).
   If agency revenues are $500,000 or less, please attach your agency’s Independent Financial Review.

   If your agency does not have an audit due to an exemption from the State Attorney General’s office or if conducting an independent financial review is not feasible, please submit a board-approved and signed financial narrative statement of the agency’s current financial position. **Please note: Financial bank statements will not be accepted in lieu of this requirement.**

8. **Agency Logo (Logo Requirements: 4 Color, 300 DPI, JPEG Format)**
   Please attach a copy of the agency’s logo to be displayed on Maui United Way's website and promotional materials. (Logo Requirements: 4 colors, 300 DPI, JPEG format). No PDFs, please.
Part 2: Program Information

There are ten sections that make up Part 2 of this application. All sections need to be Saved and marked as complete before you are able to Submit the Application.

Section 1: Application and Program Contact Information

Section 2: Funding Category Selection

Section 3: Executive Summary

Section 4: Description of Need and Target Population

Section 5: Program Description

Section 6: Organization’s Experience and Capability

Section 7: Program Objectives and Performance Measurement

Section 8: Cost-Effectiveness, Budget Reasonableness, Scalability

Section 9: Financial Information

Section 10: Grant Conditions Agreement/Senior Executive Signature
Department of Commerce and Consumer Affairs

We require that your agency is registered and in good standing with the State of Hawaii Department of Commerce and Consumer Affairs (DCCA) in accordance with GRS 414D-71 and 414D-308. If you do not already have a copy of these documents, follow the steps below to help you get started.

Department of Commerce and Consumer Affairs

Step 1: Click on or go to https://hbe.ehawaii.gov/documents/search.html

Step 2: Type your agency’s name in the text box and click on the “Search” button.

Step 3: Double click on your agency’s name to select the file.
Step 4: Click the View and Print button on the right side of your screen.

General Info

You can purchase a Certificate of Good Standing for this business.

- Digital (PDF) for $7.50
- Printed for $7.50

Click to purchase a Certificate of Good Standing

Step 5: Save a PDF of the agency’s general business information. The information provided in this document is not the certified certification of good standing and doesn’t constitute any other certifications by the State.

For the purposes of this application, this document is acceptable to MUW as it provides the last filing date for an agency. However, if the status of the annual filing is “delinquent” the agency is not in good standing.

DCCA State of Hawaii

NOTE: It is always best to submit the Certification of Good Standing document.

<table>
<thead>
<tr>
<th>Business Information</th>
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</thead>
<tbody>
<tr>
<td>MASTER NAME</td>
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<td>2013</td>
<td>Dec 4, 2013</td>
<td>Processed</td>
</tr>
<tr>
<td>2012</td>
<td>Nov 28, 2012</td>
<td>Processed</td>
</tr>
</tbody>
</table>
Department of the Attorney General’s Office – Hawaii Charities

Step 1: Click on or go to https://ag.ehawaii.gov/charity/search.html

Step 2: Click on the “Search” button to see if your agency is registered and compliant with the AG’s Office.

    NOTE: If you need to pay the agency’s annual fees click on the “Pay Fees” button.
Take a snip your organization’s status page and upload it to e-ClImpact.
Optional Attachment:

1. **Management Letter:** If your auditor submitted a management letter that was separate from your audit, you may use this space to upload the letter.

**Uploading Attachments**

Accepted file types for uploading documents:
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)’ at the bottom of the page.

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 and select ‘Delete’ next to the desired document

Step 2: Confirm you would like to delete this attachment

You are now able to upload the correct attachment.
**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.

**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, and then click on ‘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!’ (see picture on the next page.)
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.

Printing Options

Please print or save a PDF copy for your agency records.

Throughout the process, the link below is available to you to print your application. It will open your application in a separate window and you will have two options to print.

Option 1: Save this as a PDF
Option 2: Print this page