

Community Impact Volunteer Panelist

HLUW Online Portal User Guide

Getting Started

Log into the Community Impact Online Portal at <https://web.hlunitedway.org>. Enter the user ID and password provided. Your user name will typically be the first initial of your first name and your full last name. For example, a person named “Any User,” would have the username of “AUser.” If it is your first time logging into the portal, your temporary password will be your **username** plus the number **1**, i.e. “AUser1.” User names are not case sensitive, but passwords are.

If you need assistance logging in, please contact Elizabeth at emayne@hlunitedway.org.

The screenshot shows the login interface for the Head of the Lakes United Way. At the top, there is a dark blue header with the text "Head of the Lakes United Way" on the left and "LIVE UNITED" with the United Way logo on the right. Below the header are three colored buttons: "GIVE. Invest in your community." (orange), "ADVOCATE. Champion the cause." (red), and "VOLUNTEER. Give your time." (blue). The main content area is white and contains a login form with two input fields: "User ID:" with the text "AUser|" and "Password:" with a masked password "*****". Below the form is a line of text: "If you need help logging in, please contact Elizabeth Mayne at emayne@hlunitedway.org or 218.726.4779." At the bottom of the form are three buttons: "Login", "Forgot User ID or Password?", and "Password Hint". A dark blue footer at the very bottom contains the text: "For technical assistance please contact Elizabeth Mayne at 218.726.4779 or emayne@hlunitedway.org. Powered by Andar360 Fundraising Software from Helix (e17.02)".

New users are prompted to change the password when logging into the system for the first time. Enter the password twice. Enter a **Hint**, if desired. Then click **Save**.

If you forget your password, click on the **Forgot User ID or Password** button and enter the email address related to your account – the password will be sent via email from impact@hlunitedway.org.

The screenshot shows the "Change your Password" page. It has the same header and navigation buttons as the login page. The main content area is white and features the heading "Change your Password" in blue. Below the heading is a message: "Your password has expired, please enter a new password below:". There are three input fields: "Enter New Password:", "Re-enter New Password", and "Enter Password Hint". At the bottom of the form are two buttons: "Save" and "Cancel". A dark blue footer at the very bottom contains the text: "For technical assistance please contact Elizabeth Mayne at 218.726.4779 or emayne@hlunitedway.org. Powered by Andar360 Fundraising Software from Helix (e17.02)".

Common Buttons and Miscellaneous Information

The screenshot shows the top navigation bar with 'Head of the Lakes United Way' on the left and 'LIVE UNITED United Way' on the right. Below this are three colored buttons: 'GIVE. Invest in your community.' (orange), 'ADVOCATE. Champion the cause.' (red), and 'VOLUNTEER. Give your time.' (blue). The main content area displays a welcome message for user 'Any!' from agency 'New Day Shelter'. A 'Main Menu' sidebar on the left includes links for Home, My Profile, Funding Applications and Reports, Program Evaluations, My Reports, and Log Out. A 'Functions' sidebar below it includes 'Change Organization'. The main text area contains a greeting, a welcome message, a reminder to complete a program rating form by February 1, 2018, and contact information for Michelle Hargrave. A footer contains technical assistance contact information.

This close-up shows the 'Main Menu' and 'Functions' sections. The 'Main Menu' items are: Home, My Profile, Funding Applications and Reports, Program Evaluations, My Output - Reports, HLUW Online Portal User Guide, and Log Out. The 'Functions' section includes 'Change Organization', which is highlighted with a yellow box.

Header: Appears above menu on every page, allowing user to see which Agency they are currently logged in as.

My Profile: Update your contact information.

Funding Applications and Reports: Allows the reviewer to see and/or print the complete agency or program application.

Program Evaluations: Reviewers use this page in order to complete and submit their ratings and comments for each of the assigned programs.

My Output – Reports: After clicking a print or excel icon on the funding application and reports page, the requested document will also be available on this page if the user wants to view it again.

HLUW Online Portal User Guide: The online application user guide is accessible as a PDF file by clicking this menu item.

Log Out: Exit the online portal, or switch users.

• When you are finished with a session, don't forget to **Log Out** of the system.

Change Organization: Allows user to log in as different agency in order to view/print reports for that agency, if desired. You can only view the complete application of the organization whose account you are logged in as. However, you can complete program evaluations for any/all of the programs assigned to you regardless of which agency you are logged into.

My Profile

User can update or add their contact information.

Invest in your community. Champion the cause. GI

Welcome, Any!
Agency: New Day Shelter

Any's Profile

Main Menu

- Home
- My Profile**
- Funding Applications and Reports
- Program Evaluations
- My Reports
- Log Out

Functions

- Change Organization

***Name**

Prefix

First
Any

Middle

Last
User

Suffix

Personal Email:

Cell Phone

Area Number
0 0

User ID
auser

Click icon on right to change your password: *****



Items marked with an asterisk (*) are required

Save

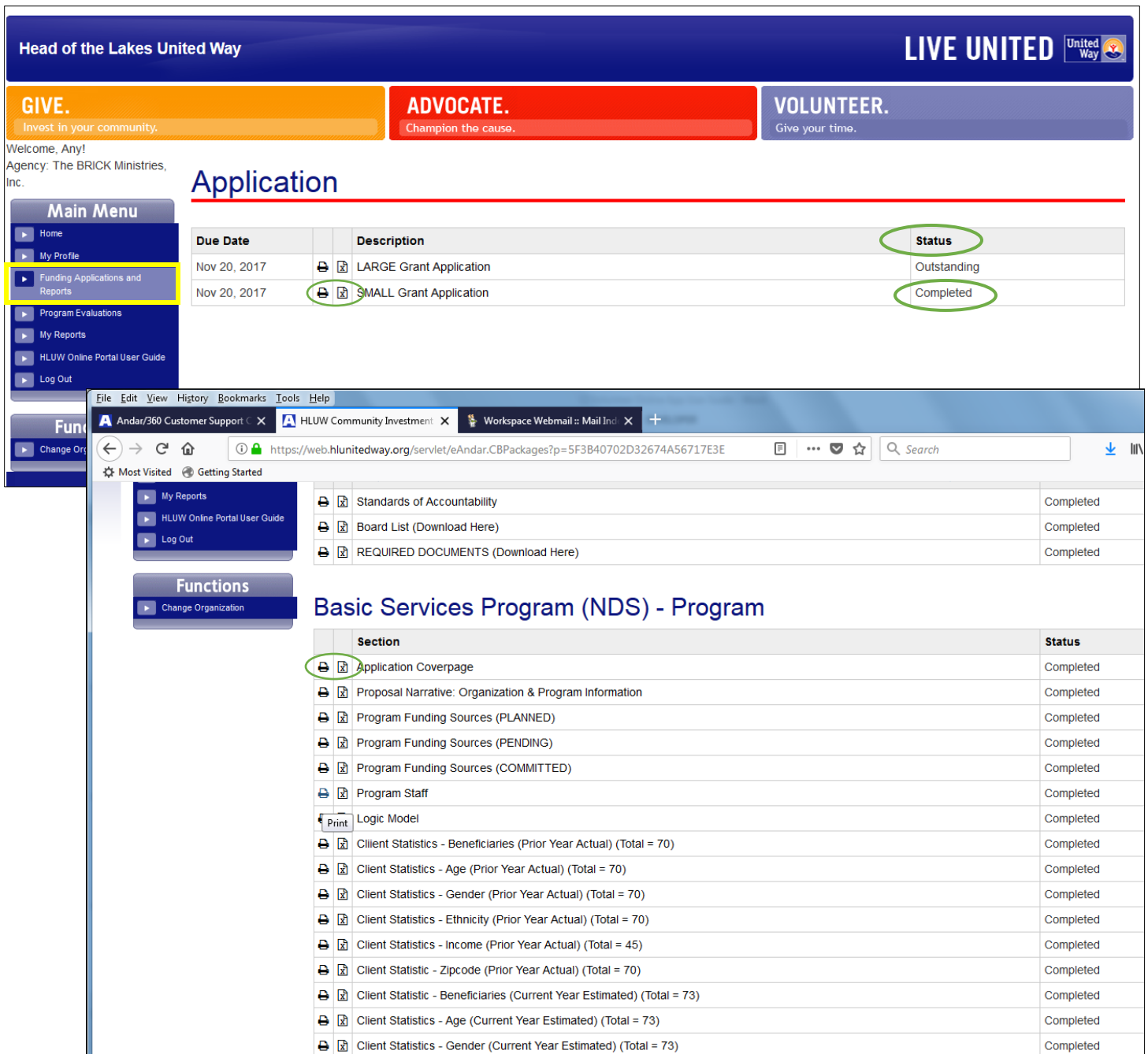
Cancel

Funding Applications and Reports – For Reference

Each agency completed either a **LARGE or SMALL grant application** for each program depending on the amount of funding they requested. To determine which grant application your assigned agency completed, look at the “STATUS” column in the table. The ones labeled “Completed” refer to the completed application and are the applications that you are tasked with reviewing. You may disregard the one that is listed as “Outstanding.”

By each form, you will see these icons:  . You can open or “print” the form as a PDF document by clicking the printer icon. You can import the form to an Excel file by clicking the Excel icon. On the “Funding Applications and Reports” page, clicking these icons will allow you to view or print the ENTIRE application. If you click the name of the completed application (i.e. “SMALL Grant Application” in the image below), it will open to a list of the individuals parts of the application, which you can view or print as needed. **Keep in mind that you must be logged into the desired agency in order to view/print their application in this manner.**

For instructions on how to CHANGE ORGANIZATIONS, see page 6 of this document.



The screenshot shows the HLUW online application portal. At the top, there are navigation buttons for "GIVE.", "ADVOCATE.", and "VOLUNTEER.". Below these, a "Main Menu" sidebar lists various options, with "Funding Applications and Reports" highlighted. The main content area displays a table of grant applications:

Due Date	Description	Status
Nov 20, 2017	LARGE Grant Application	Outstanding
Nov 20, 2017	SMALL Grant Application	Completed

Below this table, a detailed view of the "Basic Services Program (NDS) - Program" is shown. It includes a list of sections and their status:

Section	Status
Application Coveragepage	Completed
Proposal Narrative: Organization & Program Information	Completed
Program Funding Sources (PLANNED)	Completed
Program Funding Sources (PENDING)	Completed
Program Funding Sources (COMMITTED)	Completed
Program Staff	Completed
Logic Model	Completed
Client Statistics - Beneficiaries (Prior Year Actual) (Total = 70)	Completed
Client Statistics - Age (Prior Year Actual) (Total = 70)	Completed
Client Statistics - Gender (Prior Year Actual) (Total = 70)	Completed
Client Statistics - Ethnicity (Prior Year Actual) (Total = 70)	Completed
Client Statistics - Income (Prior Year Actual) (Total = 45)	Completed
Client Statistic - Zipcode (Prior Year Actual) (Total = 70)	Completed
Client Statistic - Beneficiaries (Current Year Estimated) (Total = 73)	Completed
Client Statistics - Age (Current Year Estimated) (Total = 73)	Completed
Client Statistics - Gender (Current Year Estimated) (Total = 73)	Completed

My Output - Reports

Reports allows the user to view, print and/or save all of the information submitted for the agency and program. The report will include all online forms, and will include a list of uploaded documents.

Once you click on the “Print” (PDF) or the Excel icon, your report will either open immediately, or you may get a message that the file is “being prepared” if the file is large. To retrieve the report, go to the “My Output - Reports” page. You may need to click **Refresh** to update the status. When the status is **Ready**, click on the underlined name and your document will either open directly or open a dialogue box to save it to your computer.

Reports are routinely deleted from the system after 30 days. Users can recreate the report again if it was deleted from **My Output - Reports**. Deleting a summary document does not delete the original information in the application.

Welcome, Any!
 Agency: New Day Shelter

Main Menu

- ▶ Home
- ▶ My Profile
- ▶ Funding Applications and Reports
- ▶ Program Evaluations
- ▶ My Reports
- ▶ HLUW Online Portal User Guide
- ▶ Log Out

Functions

- ▶ Change Organization

Application

The CB Package Report in spreadsheet format is being prepared. The report will be available for download from the My Output page. You may need to refresh the My Output page. To open My Outputs click here.

Due Date		Description	Status
Nov 20, 2017		LARGE Grant Application	Outstanding
Nov 20, 2017		SMALL Grant Application	Completed

For technical assistance please contact Elizabeth Mayne at 218.726.4779 or emayne@hlunitedway.org.
 Powered by Andar360 Fundraising Software from Helix (e17.02)

Welcome, Any!
 Agency: New Day Shelter

Main Menu

- ▶ Home
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- ▶ My Output - Reports
- ▶ HLUW Online Portal User Guide
- ▶ Log Out

Functions

- ▶ Change Organization

My Outputs

In order to download a report right click the link and save the report on your computer.

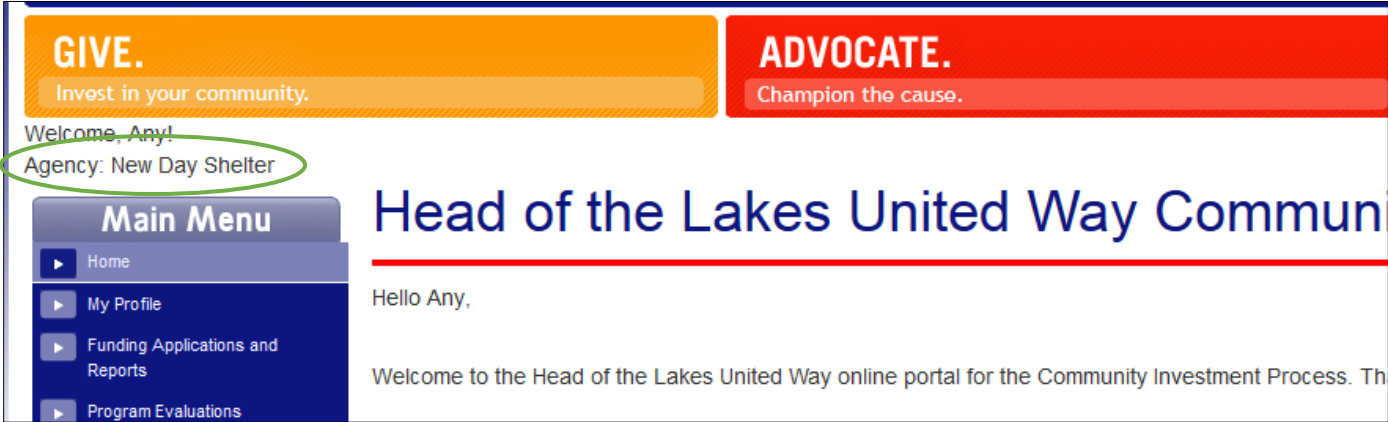
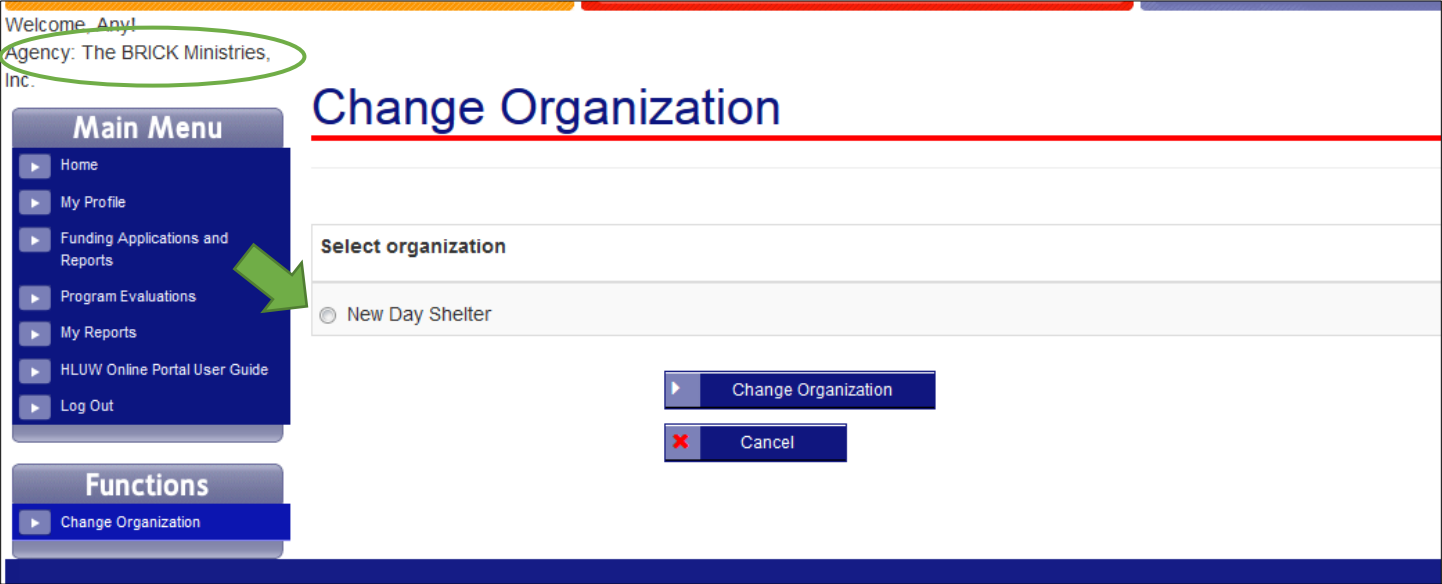
Refresh

	Job Number	Job	Names	Date	#Pages	Size	Type	Status	Description
<input type="checkbox"/>	0		Form Report - Marketing Information	12/19/2017 02:06:35 PM	1	6710	pdf	Ready	
<input type="checkbox"/>	189069	SMALL Grant Application	<u>New Day Shelter - Board List (Download Here)</u>	12/19/2017 02:01:45 PM	0	2004	csv	Ready	
<input type="checkbox"/>	189069	SMALL Grant Application	<u>New Day Shelter - Client Statistics - Beneficiaries (Prior Year Actual)</u>	12/19/2017 02:01:45 PM	0	9512	csv	Ready	
<input type="checkbox"/>	189069	SMALL Grant Application	<u>New Day Shelter - Program Funding Sources (PLANNED)</u>	12/19/2017 02:01:45 PM	0	688	csv	Ready	
<input type="checkbox"/>	189069	SMALL Grant Application	<u>New Day Shelter - Standards of Accountability</u>	12/19/2017 02:01:45 PM	0	53656	csv	Ready	

Delete
Cancel

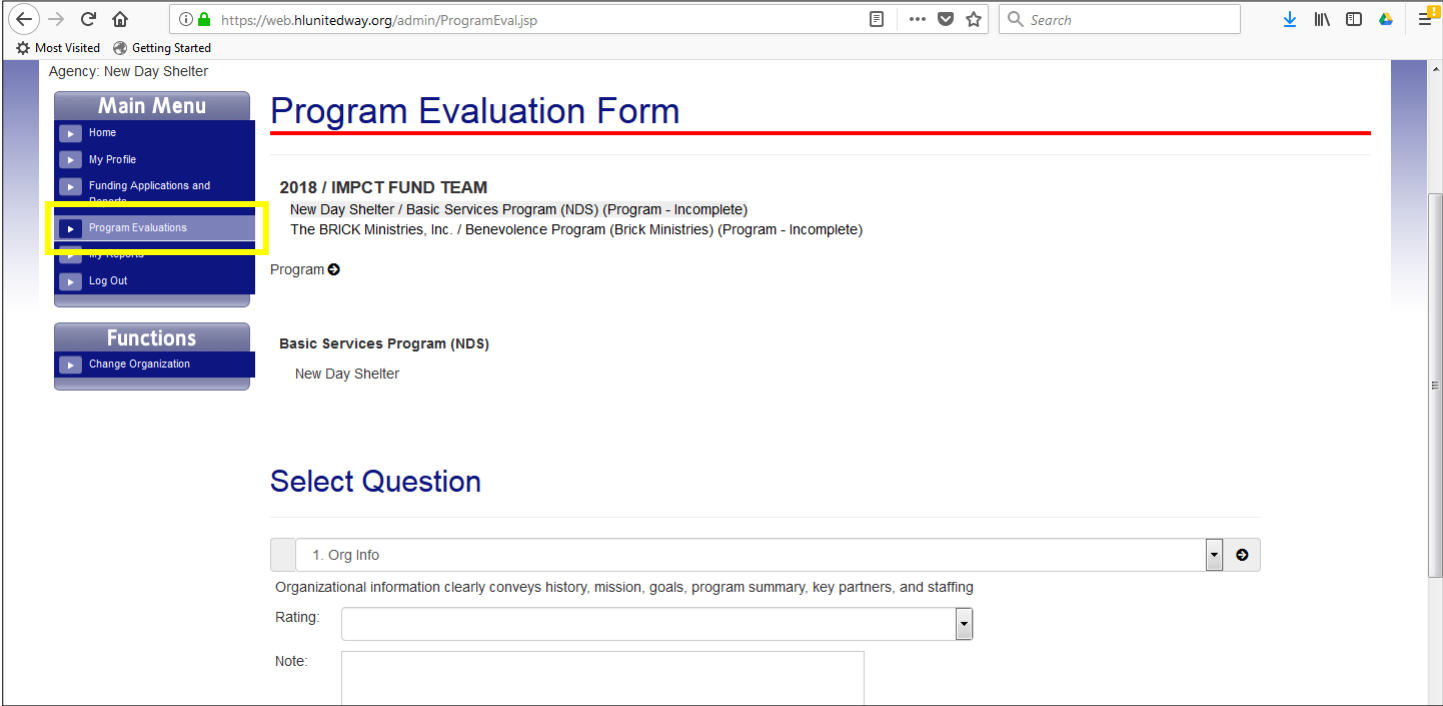
Changing to a Different Organization to View Reports

To change between your assigned organizations (agencies), click on the link on the bottom of the left-hand menu labeled “Change Organization” under “Functions.” You will be able to click on the radio button of the organization you wish to change to. **Please Note: the organization that you are currently logged into will not appear on the list.** You can see the current organization by looking above the Main menu at the Agency name listed after “Welcome, [first name]”.



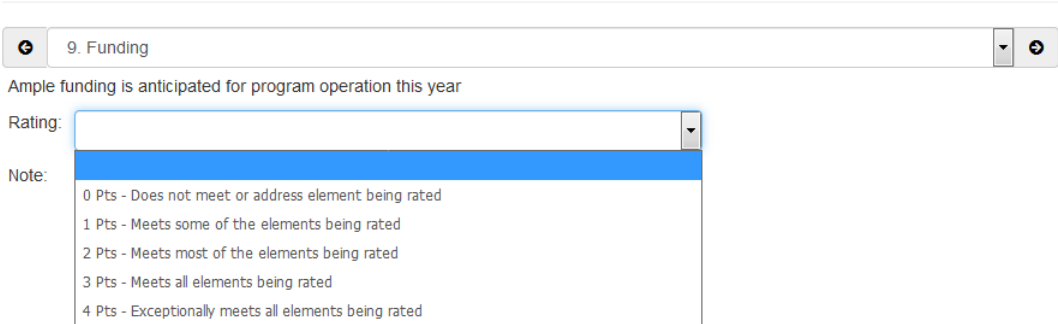
Program Evaluation Forms

When completing program evaluation forms, it does not matter which agency you are logged in as. Click on the link to the Program Evaluations in the main menu. The top of the page will list all of the Agencies/Programs which you have been assigned to review. Click on the first one in the list (“New Day Shelter/Basic Service Program (NDS)” in the example image below).



There are 29 questions to answer for each program. You may answer them chronologically or in sections. You can navigate through the questions using the arrows to the left and right of each question, or by selecting them in the drop-down list. When you reach the end of the questions for one program, it will automatically go to the next Agency/Program in your list.

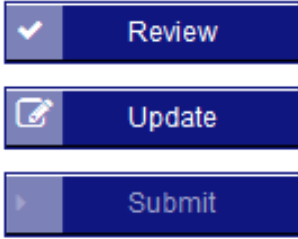
Select Question



There are two possible rating tables – assigning 0-4 points or yes/no. Each question has a text box (“Note”) for additional comments or clarification, although it is not mandatory to put text in this field.

To view all of your responses in a table format, click Review (see image below).

To save your progress, click “Update” as you complete each question.



After all programs are completed, click submit

The screenshot shows a web browser window with the URL <https://web.hlunitedway.org/admin/ProgramEvalReview.jsp?ID=H>. The page content includes a 'Note:' field, a section header 'Benevolence Program (Brick Ministries)', and the organization name 'The BRICK Ministries, Inc.'. Below this is a table with five rows of evaluation questions. Each row contains a question number, a description of the question, a rating, and a note field.

Question#	Description	Rating	Note
Question#1	Organizational information clearly conveys history, mission and goals	4 Pts - Exceptionally meets all elements being rated	SAMPLE RATING ONLY - not actual review
Question#2	Organization demonstrates the capacity to utilize partnerships effectively in its work	3 Pts - Meets all elements being rated	SAMPLE REVIEW RATING - not actual data or review
Question#3	Organization has sufficient human resources to serve effectively (# of staff, volunteers, board members)		
Question#4	Program information clearly conveys history, description, purpose, activities, strengths, and accomplishments		
Question#5	Statement of need demonstrates clear need		

Additionally, if the question pertains directly to content found in the agency’s application, corresponding reference materials are available under “Reference Materials” at the bottom of the page when that question is selected above.

Ample funding is anticipated for program operation this year

Rating:

Note:

After all programs are completed, click submit

Reference Materials:

Government Funding for 2018

Class	Type	Amount	Program Code	Name	Source
@Other	Pending	20555.00	Fundraising	Fundraising Events/Activities	
Grants	Planned	4750.00	FoundnFunding	Foundation Funding	
Grants	Committed	115264.00	WI GovFunding	Government Funding – State of WI	
Grants		120014.00	Total		

Once you have completed **ALL QUESTIONS** for **EACH OF THE PROGRAMS** to which you have been assigned to review, you may click **Submit**.

Questions or Problems?

Application content and methodology questions? Contact:

Michelle Hargrave
mhargrave@hlunitedway.org or 218.726.4771

Technical questions on the online portal? Contact:

Elizabeth Mayne
emayne@hlunitedway.org or 218.726.4779