Donor Choice
Partner Agency Training Manual

How to access the e-CImpact Agency Site & complete the online application

For support, contact:

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Welcome

Welcome to Aloha United Way (AUW)’s e-ClImpact Donor Choice Partner Agency (DCPA) application Training Manual.

This training manual aims to assist agencies with the online DCPA application needed to become a partner agency of AUW. It will cover how to access e-ClImpact, the site where the application is hosted, and complete the DCPA application.

Contacts

For e-ClImpact Assistance, including:
- Usernames and passwords
- Problems navigating the website
- Questions about using e-ClImpact
- Questions about updating contact information

Hikari Omuro  
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For questions about the overall DCPA process:

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Accessing e-ClImpact

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

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

Please bookmark the address to easily access e-ClImpact at your convenience.
Registering a New Agency

If you are not yet an Aloha United Way Partner Agency, please proceed with site registration. Registration is required for all non-partner agencies.

Step 1: Click here
Welcome to Aloha United Way's e-Cimpact Website

Aloha United Way is pleased to announce that our 2020 Donor Choice Partner Agency application will open online on Tuesday, October 15, 2019 at 1:00 pm.

Qualified agencies will be eligible to receive donor designations from our 2020 Pacesetter and General Campaigns.

Please submit your application by 5:00 pm on Friday, November 15, 2019 to be considered for partnership for the 2020 campaign year.

Here are some tips and resources to help you through the Donor Choice Partner Agency application process:

1. **Coming soon... updated video tutorials!** While watching the tutorials are not mandatory, you may find it helpful as we’ll be going through the application process step-by-step during this time. The updated videos will be posted to the resource page for our Partner Agencies - [https://www.alohauwa.org/partner-agency-candidate-registration](https://www.alohauwa.org/partner-agency-candidate-registration)

2. **Visit the Partner Agency Resource Center:** Once logged into e-Cimpact, visit the Partner Agency Resource Center at the bottom of the left-side navigation bar to access manuals, guides, and other documents that will assist you in filling out the application. Some resources will only be available after Oct 15th.

3. **Agency Compliance with the Attorney General:** Agency must be currently registered and compliant with the Attorney General’s Office - [https://ag.hawaii.gov/search](https://ag.hawaii.gov/search)

4. **Have the required documents listed below** (under Attachments to Upload): All required attachments must be uploaded in order to submit your application.

**Application Contents**

Here is a list of the sections that make up the AUW Partner Agency Application:

1. Agency Information
2. Contact Information
3. Certifications and Compliance
4. Campaign Materials
5. Electronic Fund Transfer (EFT) Information and Authorization
6. Three Year Financial Summary
7. Financial Narrative
8. Purpose for Local Funds
9. Executive Director’s Electronic Signature

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**Step 2:** Read message carefully, and then click “Next” at the bottom of the page to begin the application process (not pictured)
Step 3: Enter agency EIN and click “Next”.

NOTE: The system will automatically check your EIN. If you receive a message that your agency account already exists, please go back to the previous page and sign in using your login credentials. See page 12 for instructions on how to reset forgotten credentials.
Step 4: Check and fill out agency information.

Please note what username and password you create.

Please use your email address as your username.

Confirm that all information is correct, then click here.
Step 5: Select the DCPA application and click “Next”
Step 6: 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. Click on “NEXT” at the bottom of the page to start the application.

<table>
<thead>
<tr>
<th>Print registration summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Registration Summary</td>
</tr>
<tr>
<td>Confirmation #: 18641</td>
</tr>
<tr>
<td>Successfully submitted on: 10/2/2014 at 9:55 PM CST</td>
</tr>
<tr>
<td>Confirmation Number: 18641</td>
</tr>
<tr>
<td>Agency Name: ALOHA UNITED WAY INC</td>
</tr>
<tr>
<td>Email: <a href="mailto:lauren@uww.org">lauren@uww.org</a> (Work)</td>
</tr>
<tr>
<td>Phone Number: 808881234 (Direct)</td>
</tr>
<tr>
<td>Mission Statement: Live United</td>
</tr>
<tr>
<td>Address: 200 K VINEYARD BLVD STE 700, KONA, Hawaii 96745-3952 (Main)</td>
</tr>
<tr>
<td>Contact Name: Ms. me you (Program Staff)</td>
</tr>
<tr>
<td>Company: ALOHA UNITED WAY INC</td>
</tr>
<tr>
<td>Job Title: Associate, Community Impact</td>
</tr>
<tr>
<td>Username: ALAW_CI</td>
</tr>
<tr>
<td>Password: *******************</td>
</tr>
</tbody>
</table>

Click on “Next” to start the application.
Agency Login

Now that you have accessed your Agency site, it is time to login.

If you do not know or remember your username and password, please contact Hikari Omuro. If you have your username but have forgotten your password please see the next page for instructions on how to reset your password.
Forgotten Password

Step 1: Click ‘Forgot your Password?’

Step 2: Enter your Username

Step 3: Click ‘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 Hikari Omuro.
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. List of Applications and Reports
4. Resource Center
1. Account Management

Change Password

Step 1: 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.

My User Profile

The My User Profile area is where you are able to add, edit, or delete any of your information including: primary contact designation, basic information, email addresses, phone numbers, and mailing addresses.

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. This individual is likely to complete applications and reports, manage contact information, and perform other administrative tasks. In many cases this is not the Executive Director. This person is also Aloha United Way’s point of contact for general correspondence.

Include in all Emails: This allows users to receive all emails sent through e-ClImpact. 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.’ If a user is deactivated you will need to contact Hikari Omuro to reactivate the user account.

2. Agency Information

The Agency Information section allows you to view and update agency information, contacts, statements, and program information.

Agency Profile

The profile page contains all agency specific information, including agency address, phone, primary contact, and more.
Contacts

In Contacts, you may add or edit any contacts at your organization. You may also request logins for other staff at your organization so that they can access e-CImpact. Please do not delete any contacts. If a person has left your organization, contact Hikari Omuro.

3. List of Applications and Reports
A list of currently accessible Aloha United Way applications and reports.

4. Resource Center
Houses various resources to help guide your application or give additional info.
Common Navigation

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

Save My Work: Saves your work and refreshes the page.

Save My Work and Return to Previous Page: Saves your work and goes back one page.

Save My Work and Mark as Complete: Saves your work and marks the page for completion. All pages must be marked complete before the application is submitted.

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. Click the large ‘A’ to increase the font size. Click the smaller ‘A’ to decrease the font size.

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

Fields marked with an * are required fields.

Required Questions: Any field with an * is required and must be filled out.
Basics of the Application

Accessing the Application

Renewing partners: Select Partner Agency Application RENEWING (2020) from the list on the left or the homepage.

New partners: Select Partner Agency Application NEW/RETURNING (2020) from the list on the left or the homepage.

Returning partners (agencies who were a partner of AUW in the past but not in 2019): Click “Open Processes” from the list on the left, then select Partner Agency Application NEW/RETURNING (2020) from the list.

Application Status
This page works like a check list. Each page of the application is listed with their status.

Not Started: No data has been entered on this page.

In Progress: This page is being worked on.

Ready to Submit: This page is complete and ready for submission.

Submitted: This entire application has been submitted. After submission, no edits can be made. Please contact Hikari Omuro if you would like to make changes.

Switching Pages
There are two ways to switch pages within an application:

First: When you are finished with one page, click on ‘Save My Work and Return to Previous Page’, and then select the next page.
Second: You can use the ‘Switch Forms’ option, located in the upper right hand corner.

The form you are currently on is not clickable.

All changes made to your current form are automatically saved.

The other forms are available to choose.
Application Process

There are ten forms, or pages, that you will need to complete in order to submit your Donor Choice Partner Agency Renewal application. All pages must be saved and marked as completed before being able to submit the application.

Section 1: Agency Information

Asks for basic agency information. Some of the fields have been pre-populated with information provided from your agency profile. Even though the fields are pre-populated you are still able to make changes directly on this page.

Section 2: Contact Information

Asks for contact information for individuals at your agencies. Please read the descriptions of each contact carefully and associate the appropriate individual. An individual may be associated more than once, if appropriate.

Section 3: Certification & Compliance

Lists certifications that agencies must comply with. Please read each section very carefully before selecting “I certify” from the drop down list. By selecting “I certify” you are certifying that all of the information is true to the best of your knowledge.

Section 4: Campaign Materials

Asks for agency information to display on our campaign materials. Please update/complete agency information exactly as you wish to have it displayed to the general public on Aloha United Way’s website and promotional materials. You may list your agency however you prefer (e.g. “AUW” vs. “Aloha United Way”). Please be sure to proofread this page before submitting.

Section 5: Electronic Fund Transfer (EFT) Information and Authorization

Asks for your agency’s EFT information. Some information will be prepopulated for renewing and returning agencies. The contact you associate with your EFT information should be a staff at your agency, not at your financial institution. Please make sure to double check your account and routing numbers.

Section 6: Three Year Financial Summary

Asks for your financial information from the last three years.

First, enter the years for which you are submitting financial information.
Year 1 = Least current financials (i.e. 2016)
Year 2 = Prior to most current financials (i.e. 2017)
Year 3 = Most current financials (i.e. 2018)

Then, complete all required financial information for your organization’s three most recently completed fiscal years. Information in this section should be consistent with each year’s IRS Form 990. If your agency is not required to submit an IRS Form 990, use your agency’s financial statements to complete this section.

Smaller agencies that file Form 990EZ or Form 990N may submit it with completed pages 1 and 2 of the Form 990.

If you are an affiliation of a national agency, include financials of your LOCAL operation only.

**Section 7: Financial Narrative (Optional)**

Use this page to explain any significant financial trends in the Financial Summary, if any.

**Section 8: Purpose for Local Funds**

To confirm that your agency does provide services on Oahu per AUW policy, please indicate whether you are part of a national or regional structure, and if so, describe how funds collected locally will be used locally.

**Section 9: Executive Director’s Electronic Signature**

The Executive Director or equivalent must complete this section. Full name and title of the authorized staff member is required.

**Section 10: Attachments**

In this section you can upload the required documents.

**Required:**

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. See page 23 for detailed instructions.
3. **State of Hawaii Attorney General's Office***
   Upload proof of your agency’s compliance with the AG’s Office. See page 25 for detailed instructions.

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 or equivalent including the signature of an officer and all applicable schedules.

6. **IRS Form 990 & All Schedules - Year 1 (least current financials)**
   Attach a copy of the agency’s Year 1 (the year prior to Year 2) completed IRS Form 990 or equivalent including the signature of an officer and all applicable schedules.

7. **Audit & Management Letter or Independent Financial Review***
   Audit or Independent Financial Review must not predate the financial information on Page 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. Refer to the FAQ document in the Resource section in e-ClImpact.
   **Please note: Financial bank statements will not be accepted in lieu of this requirement.**

8. **Management Letter (Optional):** If your auditor submitted a management letter that was separate from your audit, you may use this space to upload the letter.
9. **Agency Logo (Logo Requirements: 4 Color, 300 DPI, JPEG Format)**

Please attach a copy of the agency’s logo to be displayed on Aloha United Way’s website and promotional materials. (Logo Requirements: 4 color, 300 DPI, JPEG format). No PDFs, please.
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.

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

Step 2: Type agency name & click “Search”

Step 3: Double click to view available documents
NOTE: The information provided in the Agency Information PDF is not the certified certification of good standing and doesn’t constitute any other certifications by the State.

For the purposes of Aloha United Way’s Partner Application, this document is acceptable. If possible, it is best to submit the Certification of Good Standing document.
Step 1: Click on or go to: https://ag.ehawaii.gov/charity/welcome.html

Step 2: Search to see if your Agency is registered and compliant with AG’s Office.

Click here if you need to pay annual fees to be compliant with the AG’s Office.
Step 3: Take a snip or screenshot of the information page and upload it to e-Clmpact.
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 attachments page

Step 2:
Step 3:

Step 4:

Viewing Attachments
Deleting Attachments

**Step 1:** Open attachment page

**Step 2:**

**Step 3:** Confirm you would like to delete this attachment
Submitting Your Application

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

**Step 1**: Open page

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

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

Submit!

Once all pages 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!’

*Please note: Once an application is submitted 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.

[View Printable Version of this Entire Application](#)

Click here to print out your application:
Congratulations! You have successfully submitted your 2020 DCPA Application.

Final approvals will be sent out in March 2021.