

Providence Health & Services
Center for Community Health Improvement

**Grant Tracking
Database**

Documentation

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Getting Started

Note: Microsoft Access is required to open the Grant Tracking database. Contact Information Systems at **Ext. 73073** to have MS Access installed.

To get started, follow the steps below:

- go to: \\pcasjisshared\shared\CA Com Health\Grant_Tracking\Front_End
- Download a copy of “**Grant_Tracking.mde**” to your desktop. (see illustration 1.1)
- Open “**Grant_Tracking.mde**” from your desktop.
- Grant Tracking Database will open. (see next page)
- You should now be able to use any of the available functions within the database.

If you encounter any problems or system lag, please contact John Esplana at ext. 73864 or email at John.Esplana@providence.org

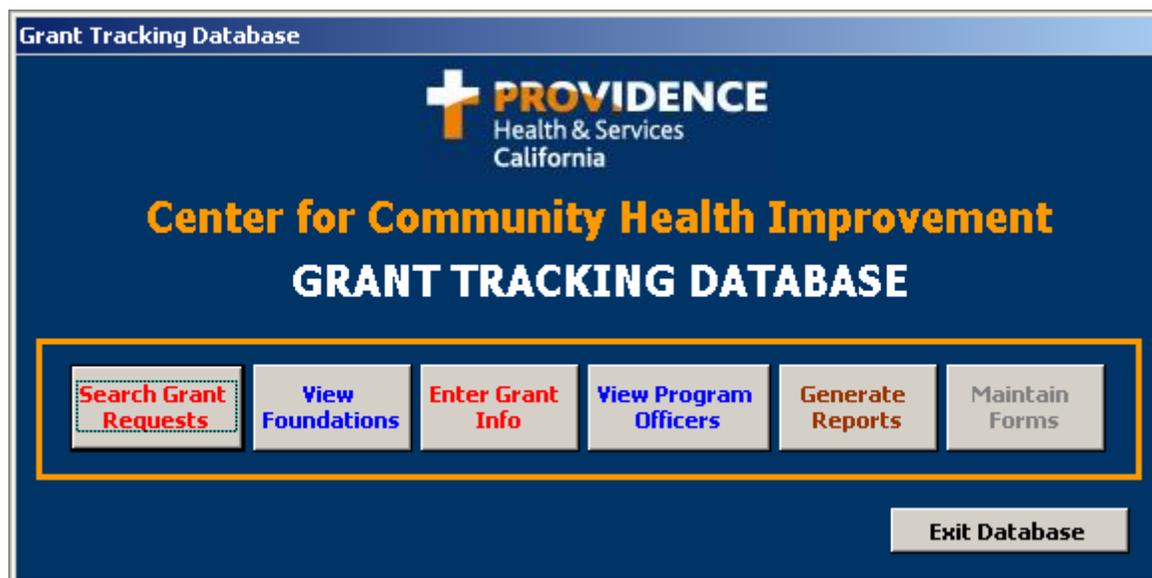
The database can be accessed anywhere within the PHS network.

Illustration 1.1



Main Switchboard

The main switchboard is the hub for all of the functions within the database. (Pictured below)



Description of each buttons:

- | | |
|------------------------------|--|
| Search Grant Requests | - Search previously entered grant information. See “Searching Grant Request” section for more information. |
| View Foundations | - View/edit/Add foundation information. See “Add/Edit/View Foundation Information” section for more information. |
| Enter Grant Info | - Enter new grant request information. |
| View Program Officers | - View/Edit/Add Program Officer Information. |
| Generate Reports | - Generate customized reports and print. |

Search Grant Requests

You may set numerous criteria to narrow the search results down to your exact specifications.

- The date sections allow you to search by date ranges. (e.g. set progress due date: From: 01/01/2008 to: 01/31/2008 will return only funded grants with a progress report due date for the month of January)
- To view/edit grant information, double click on the foundation name to expand the information of the item you had selected.

Grant Tracking Database



Progress Due Date	Full Proposal Date	LOI Date	Contract Signed	Grant Amount	Requested Amount
From: <input type="text"/>	From: <input type="text"/>	From: <input type="text"/>	From: <input type="text"/>	Min Amount: <input type="text"/>	Min Amount: <input type="text"/>
To: <input type="text"/>	To: <input type="text"/>	To: <input type="text"/>	To: <input type="text"/>	Max Amount: <input type="text"/>	Max Amount: <input type="text"/>

Grant Status: <input type="text"/>	Status Date: From <input type="text"/>	Activity: <input type="text"/>
Foundation Name: <input type="text"/>	To: <input type="text"/>	Submission Type: <input type="text"/>
Program: <input type="text"/>		

Search Results Double-click foundation name to view details of the record

FoundationID	ProgramOfficerID	Foundation	ProgramID	ActivityID	AmountofRequest
▶ Foster G. McGaw Award for (All 5 Core Programs		\$100,000.00

Record: of 1

Today is: Friday, October 31, 2008

Add/Edit/View Foundation Information

To view existing foundation information, click on the drop-down menu to select a foundation. You may edit any of the available fields once the information is on the screen.

Foundation Information Form

View available foundation to edit/delete.

View/Edit Foundation Information

FoundationID

Select Foundation:

Foundation Name:

StreetAddress1:

StreetAddress2:

City:

State: Zip:

Contact Information:

Phone Number:

Fax Number:

Email Address:

Comments:

Interested Activities:

ActivityID
<input type="text"/>

Select activities that the foundation is interested in funding.

Program Officer(s):

LastName	FirstName	OfficerPhone	OfficerFax	C
<input type="text"/>				

Provides a list of program officers associated with the foundation. To add a program officer. Go to View Program Officer from the main Switchboard.

To add a new foundation, click on Add New

Enter New Grant Information

Grant Entry Form

Select the foundation from the drop-down menu. if not listed, press the ESC key on your keyboard and add from the main switchboard.

GrantID [AutoNumber]

Foundation Name:

Program Officer: **Add**

Foundation Contact Date:

Program Name:

Activity Name:

Amount Requested:

Letter of Inquiry (LOI) Sent? **LOI Sent Date:** **Submission Type:**

Full Proposal Letter Sent? **Full Proposal Sent Date:**

Status: **Status Date:**

Amount of Grant: **Contract Signed Date:**

Date Progress Report Due:

Progress Report Submit Date:

Next Due Date:

Grant Duration:

Comments:

Add New **Delete** **Undo** **Save** **Close**

Select Program Officer
Click Add if not listed.

Once you are finished, click the “Close” button.
To add more grant information, click “Add New”.

Add/View/Edit Program Officers

Program Officer Entry Form

Add/Edit Program Officer Entry

ProgramOfficerID [toNumber]

Search Officer: [dropdown]

FoundationID [dropdown]

LastName [input]

FirstName [input]

OfficerPhone [input]

OfficerFax [input]

OfficerEmail [input]

Comments [text area]

Select officer/foundation from the drop-down menus. If officer is not listed, click add new. If foundation is not listed, go back to the switchboard and add.

Add New Delete Undo Save Close

To add a new program officer, click “Add New” and fill in the blank fields.

To edit an existing program officer’s information, select the officer from the drop down menu.

To associate the program officer to a foundation, select the foundation from the FoundationID drop down menu. If foundation is not listed, you may add it from the main switchboard.

Generate Reports

The screenshot shows a web-based interface for a 'Grant Tracking Database'. The main heading is 'Report Generator'. Below the heading, there is a note: 'Note: Entering Date Ranges will work only for Progress Report due dates'. The interface includes a 'DATE' section with 'From:' and 'To:' input fields. The 'From:' field contains '1/1/1900' and the 'To:' field contains '11/3/2008'. Below the date fields are four dropdown menus for 'Foundation Name', 'Program Name', 'Activity Type', and 'Status'. There are two rows of buttons: the first row has 'Activities by Foundation' and 'Foundations by Activity'; the second row has 'Program Status', 'Progress Report', 'Grant Status', and 'Funded Requests'. At the bottom right, there are 'Reset' and 'Print' buttons.

The following criteria can be used to narrow down the results for the following:

- Foundation Name
- Program Name
- Activity Type
- Status

Description of the report buttons are described below:

- **Activities by Foundation** - generates a list of foundations that is interested in a particular activity. *Sorted by Activity*
- **Foundations by Activity** - generates a list of activities that is of interest by the foundation. *Sorted by Foundation*
- **Program Status** - generates the number of requests submitted for each program and its current status. I.e. how many were funded, denied, or currently pending?
- **Progress Report** - generates a list of funded requests report that is due for the date ranges entered. (e.g. Date ranges 1/1/2009 – 1/31/2009 will show the foundations requesting a progress report for the month of January 2009).
- **Grant Status** - Generates a list of requests by Status
- **Funded Requests** - Generates a list of request that has received funding from foundations.

Maintaining Forms

Combo Boxes Maintenance Area

Add/Edit Combo Box Options

IMPORTANT: Please DO NOT delete any records.

Activities | Programs | Grant Status | Submission Type | Grant Duration

Add New Program Activities:

ActivityName
▶ Breast Cancer
Violence Outreach Integrating Care and Empowerment (V.O.I.C.E)
Latino Senior Peer Counseling Program
Familias Ayudando Familias
Volunteers for Seniors Program
Combating Diabetes Project
Latino Senior Outreach Project
Healthy Bodies, Healthy Minds Project
Community Partnerships to Eliminate health Disparities
Mujeres Ayudando Mujeres (Women helping Women)
Health Insurance Program
Purchase of Medical Center Equipments
Program Expansion
Project Helping Adult Latinas Target HIV/AIDS

Record: 1 of 22

This area will allow the user to maintain the drop down menus. Please do not delete any records that are currently listed in this form.

Tab Descriptions

- **Activities** - These are the activities provided by the programs
- **Programs** - These are the programs provided by the Center for Community Health Improvement
- **Grant Status** - List of grant status
- **Submission Type** - List of submission types
- **Grant Duration** - List of grant durations

Frequently Asked Questions

Q: I have the file on my desktop but I can't open it?

A: You may not have Microsoft Access installed. Please capture a screen shot of the error and send an email to John Esplana. If you do not have Microsoft Access installed, please contact your manager to submit a request to IS for Access to be installed.

Q: How do I search for the grant requests I have written a full proposal for January of 2008?

A: Go to the switchboard and click on Search Grant Requests then enter the date ranges under Full Proposal Date: 1/1/2008 – 1/31/2008. Click search.

Q: How do I search for the grant requests I have written a Letter of Intent for January of 2008?

A: Go to the switchboard and click on Search Grant Requests then enter the date ranges under LOI Date: 1/1/2008 – 1/31/2008. Click search.

Q: How do I edit the requests that I have previously entered?

A: Go to the switchboard and click on Search Grant Requests. Search for your request by using the search criteria. Once you have found the request, double-click on the foundation name to view the details of the request and edit.

Q: How do I enter new grant requests?

A: *Please see Enter New Grant Information*

Q: How do I add new items in the drop-down menu?

A: *Please see maintaining forms*