

Providence Health & Services
Center for Community Health Improvement

**Grant Tracking
Database**

Documentation

Table of Contents

Getting Started	3
Main Switchboard	4
Search Grant Requests	5
Add/Edit/View Foundation Information	6
Enter New Grant Information	7
Add/View/Edit Program Officers	8
Generate Reports	9
Maintaining Forms	10
Frequently Asked Questions	11

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

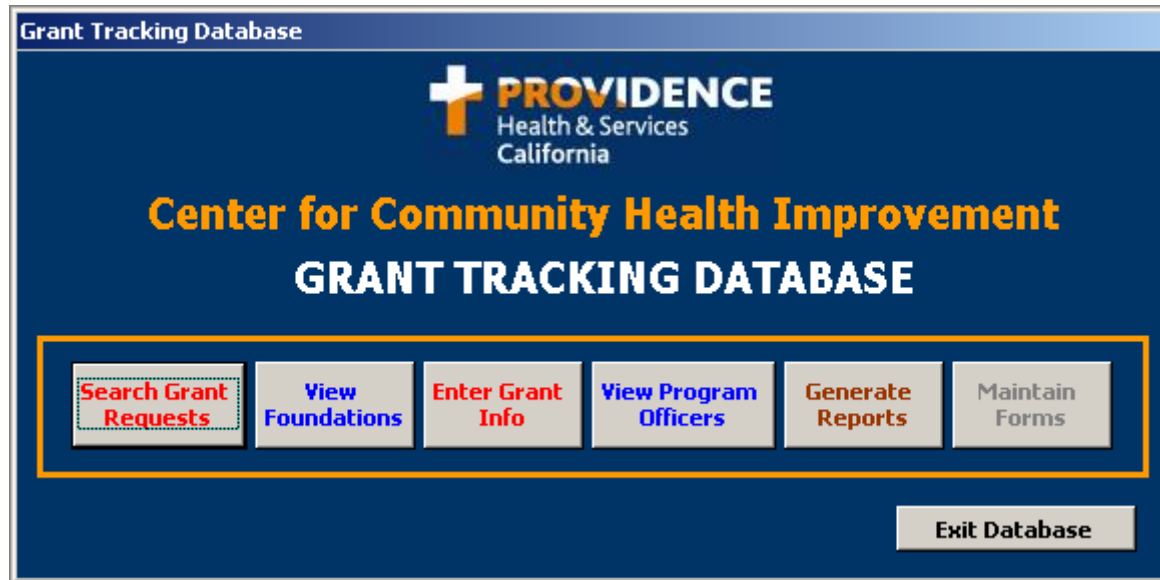
The database can be accessed anywhere within the PHS network.

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

Grant Tracking Database

Center for Community Health Improvement



Progress Due Date

From To

Full Proposal Date

From To

LOI Date

From To

Contract Signed

From To

Grant Amount

Min Amount Max Amount

Requested Amount

Min Amount Max Amount

Grant Status:

Foundation Name:

Program:

Status Date: From To

Activity:

Submission Type:

Search

Reset

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: 1 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.

The screenshot shows a web application window titled "Foundation Information Form". The header bar is dark blue with the text "View available foundation to edit/delete." on the left and "View/Edit Foundation Information" in large orange letters on the right. Below the header, the form is organized into several sections:

- Select Foundation:** A drop-down menu with a small arrow pointing to it from a callout box.
- FoundationID:** A text box containing "AutoNumber".
- Foundation Name:** A large text input field.
- StreetAddress1:** A text input field.
- StreetAddress2:** A text input field.
- City:** A text input field.
- State:** A small text input field.
- Zip:** A small text input field.
- Contact Information:** A section containing three text input fields: "Phone Number:", "Fax Number:", and "Email Address:".
- Interested Activities:** A section with a table header "ActivityID" and a list of activities. A callout box points to the list with the text: "Select activities that the foundation is interested in funding."
- Comments:** A large text area for entering comments.
- Program Officer(s):** A section with a table header: "LastName", "FirstName", "OfficerPhone", "OfficerFax", and "C". Below the table is a callout box that says: "Provides a list of program officers associated with the foundation. To add a program officer, go to View Program Officer from the main Switchboard."

At the bottom of the form, there is a callout box that says: "To add a new foundation, click on Add New". To the right of this box are five buttons: "Add New", "Delete", "Undo", "Save", and "Close".

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:

Full Proposal Letter Sent? ☐ Full Proposal Sent Date:

Submission Type:

Status: Status Date:

Amount of Grant: Contract Signed Date:

Date Progress Report Due:

Progress Report Submit Date:

Next Due Date:

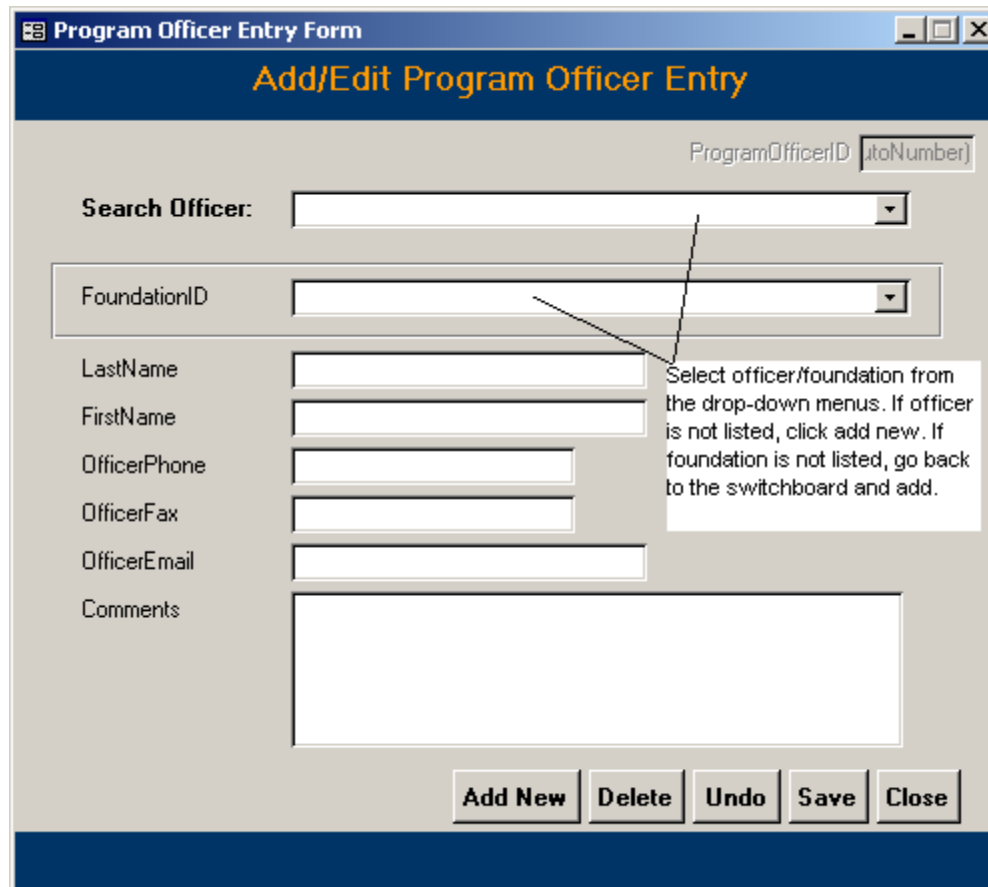
Grant Duration:

Comments:

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

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

Add/View/Edit Program Officers



The screenshot shows a web application window titled "Program Officer Entry Form". The main heading is "Add/Edit Program Officer Entry". At the top right, there is a text field for "ProgramOfficerID" with a "Go to Number" button. Below this is a "Search Officer:" label followed by a dropdown menu. To the left of the form is a "FoundationID" dropdown menu. Below these are input fields for "LastName", "FirstName", "OfficerPhone", "OfficerFax", and "OfficerEmail". At the bottom is a large "Comments" text area. At the very bottom are five buttons: "Add New", "Delete", "Undo", "Save", and "Close". A callout box with a pointer to the "Search Officer:" dropdown contains the text: "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."

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 application window titled "Grant Tracking Database" with a sub-header "Report Generator". A note states: "Note: Entering Date Ranges will work only for Progress Report due dates". Below this, there is a "DATE" section with "From:" and "To:" fields. The "From:" field contains "1/1/1900" and the "To:" field contains "11/3/2008". Below the date fields are four dropdown menus labeled "Foundation Name:", "Program Name:", "Activity Type:", and "Status:". Below these are two buttons: "Activities by Foundation" and "Foundations by Activity". Below these are four buttons arranged in a 2x2 grid: "Program Status", "Progress Report", "Grant Status" (in red text), and "Funded Requests" (in red text). At the bottom right are a "Reset" button and a button with a printer icon and a plus sign.

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 Latinos 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*