CaliforniaVolunteers - Portal User Guide

Version 1.0

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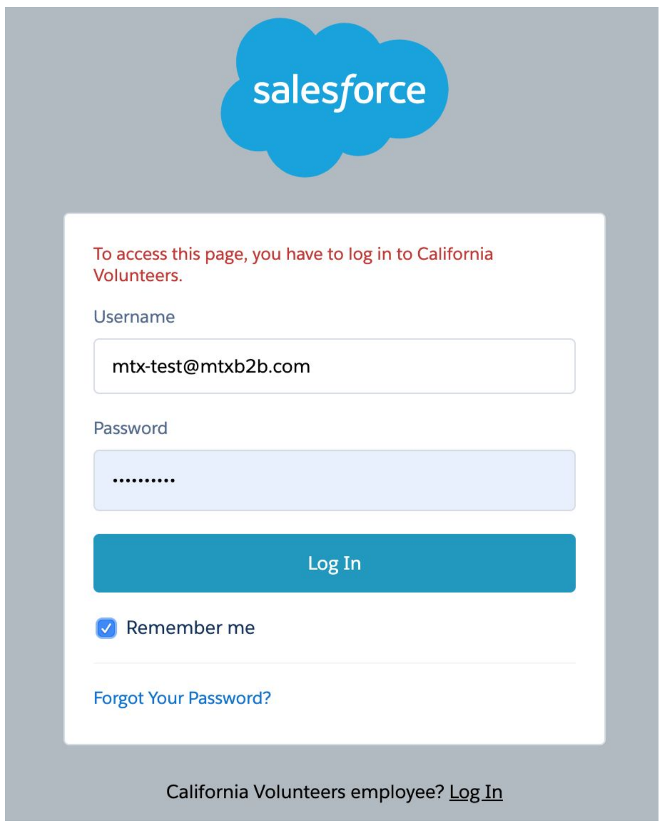
CaliforniaVolunteers Portal Guide for Sub-grantees

1. Logging into the Portal

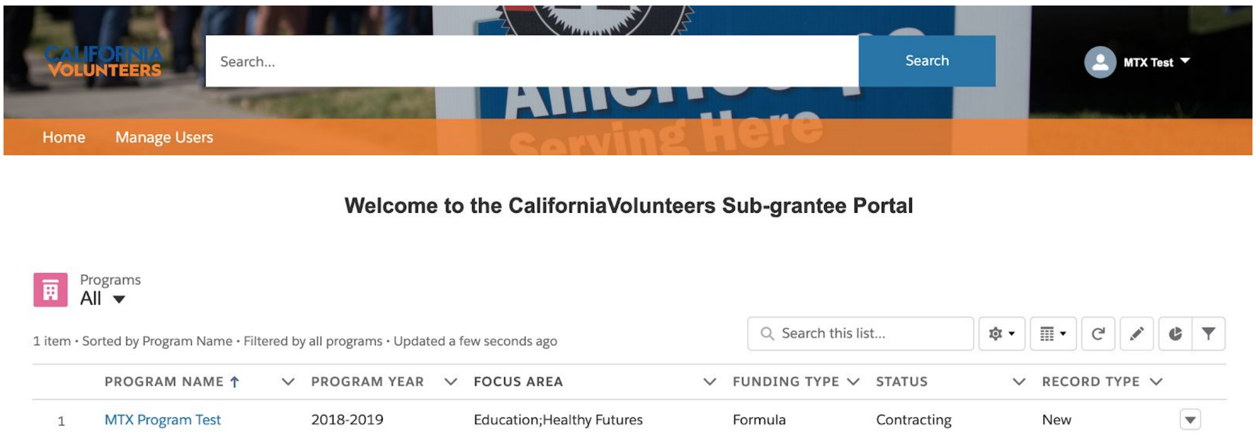
1.	Primary Legal Applicants will be invited to log into the portal after the application process. The Primary Legal Applicant will be able to add other Users to collaborate on required information from the Program.
2.	To log into the Portal, please navigate to https://californiavolunteers.force.com/CaliforniaVolunteers/ . It is recommended you bookmark this link for easy access in the future.



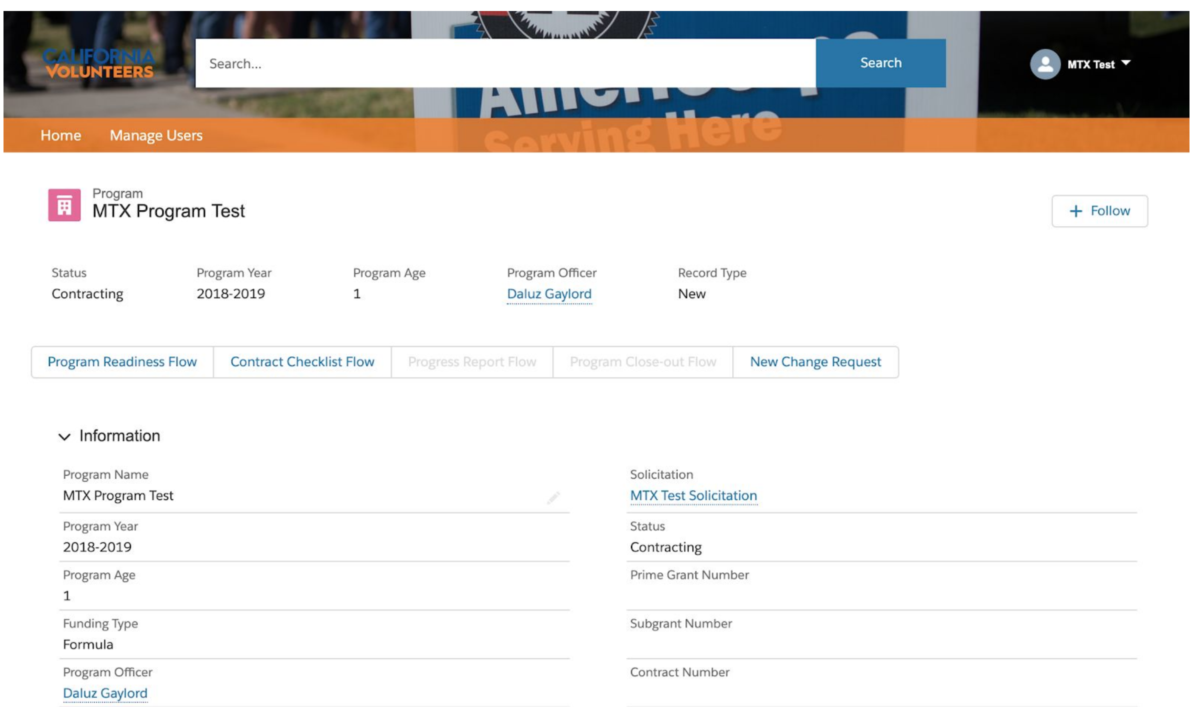
3.	Enter your Username and Password and click Log In.

2. Viewing your Program

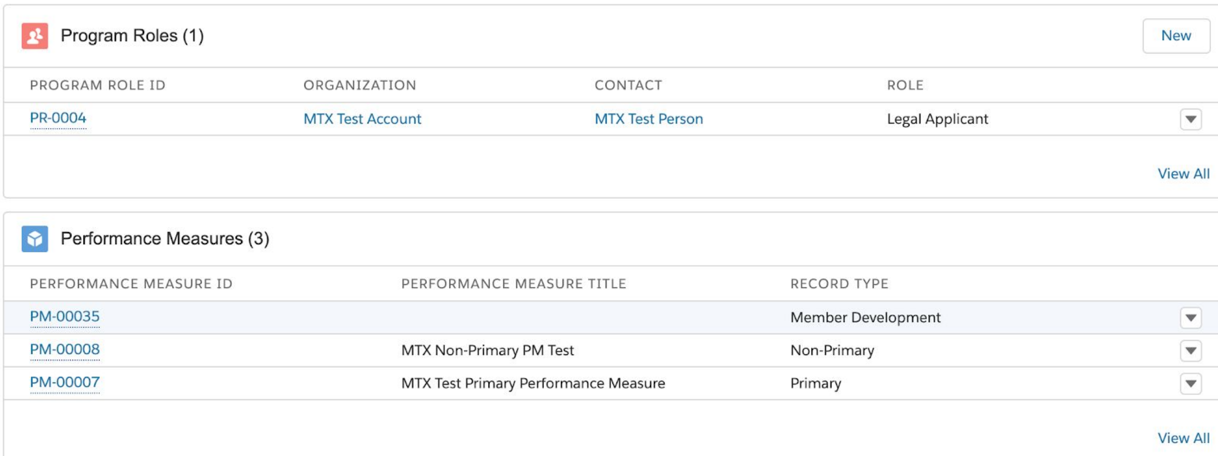
1.	The Home page will display all of the Programs available to you. Click on the Program you wish to view.



2.	The Program view will show you the information CaliforniaVolunteers currently has on your Program. Updates happen in real time, so you can review your Program's information from CaliforniaVolunteer's perspective.



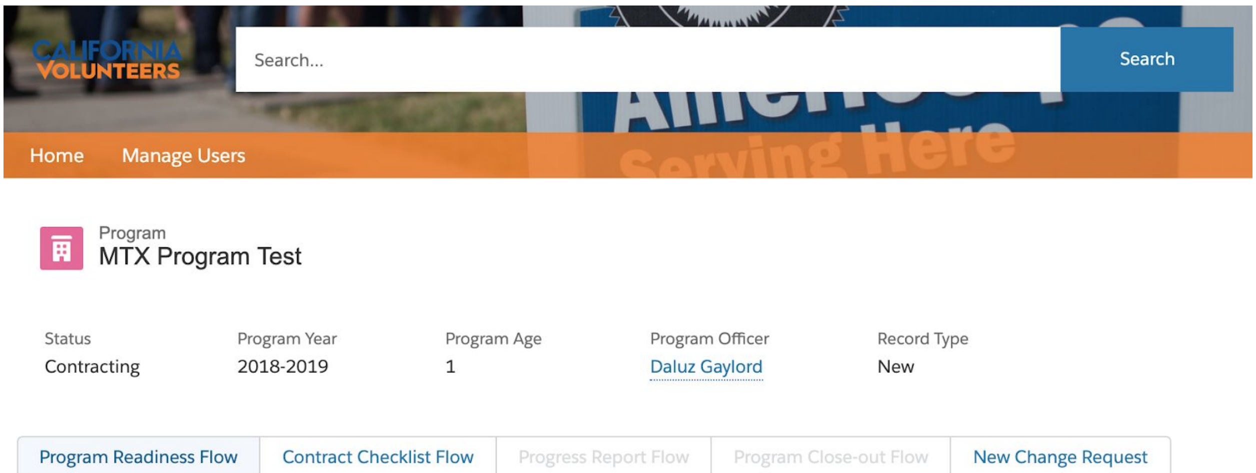
3.	Scrolling towards the bottom you can view other information about your Program such as your Performance Measures and Service Locations.



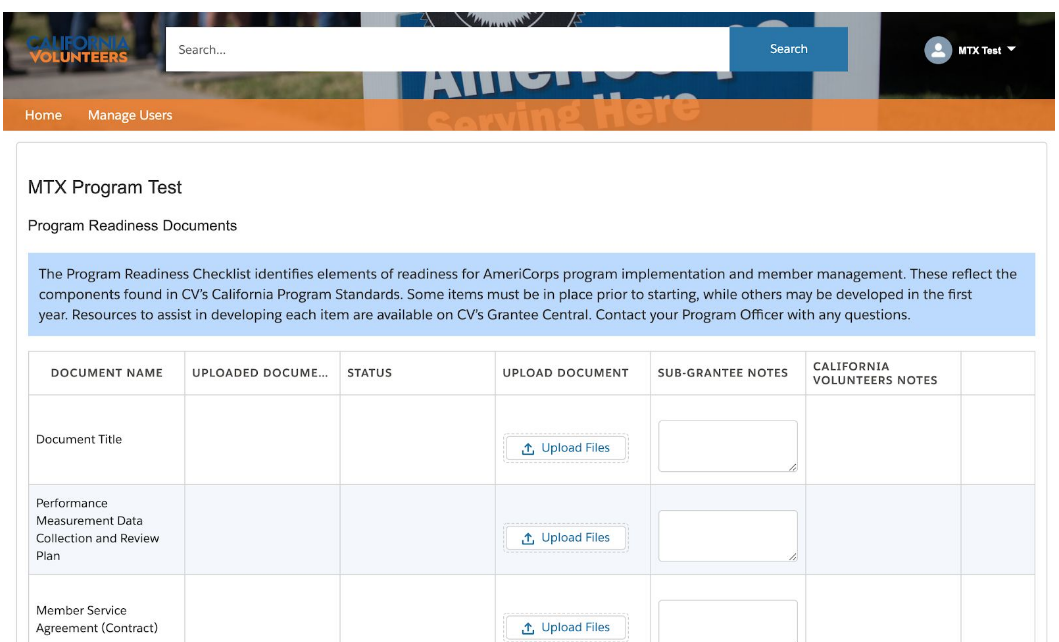
4.	Clicking on the blue link will allow you to view that information just like your Program's information.

3. Uploading your Program Readiness Documents

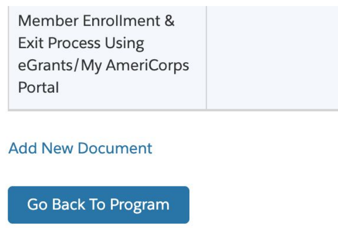
1.	The first step in completing all required documentation for CaliforniaVolunteers is the Program Readiness document checklist. To access the Program Readiness flow, please find the corresponding button on your Program.



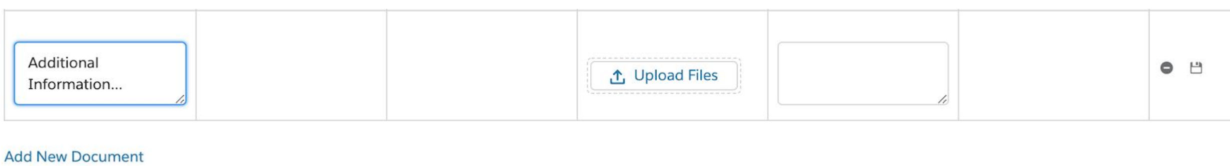
2.	Program Readiness will have all of the required documents for you to upload in terms of Program Readiness. For each row you can upload a document and add notes.



3.	In the uncommon circumstance that a row does not apply to you (possibly because you covered it in a previous document), you can indicate such in the notes and skip uploading a document.
4.	If you would like to add additional documents, you can add another row by clicking “Add New Document”



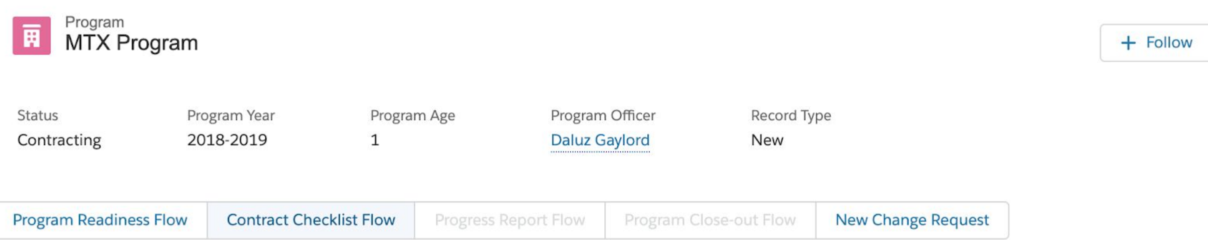
4.	If you would like to add additional documents, you can add another row by clicking “Add New Document”



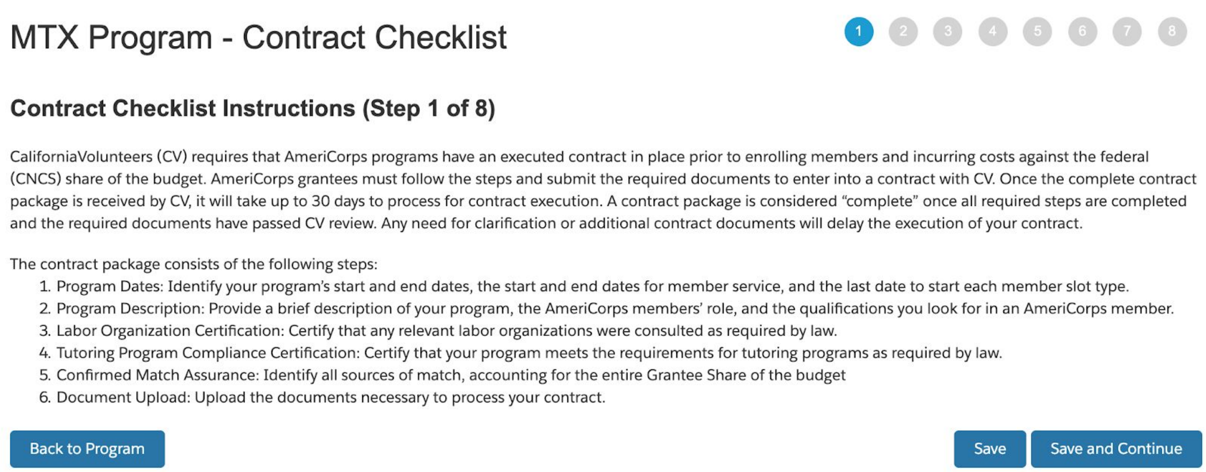
5.	You will be able to name it to give context to CaliforniaVolunteers, and notes are recommended for all new documents. You can also delete it by using the delete icon on the right.
6.	If you are not submitting your document as soon as you upload it, it is recommended you click the “Save” icon on the right in order to not lose any comments you created.
7.	To submit your documents, first review to ensure you covered every row. Once you have done that, click on Submit in the bottom right corner of the page.

4. Completing the Contract Checklist

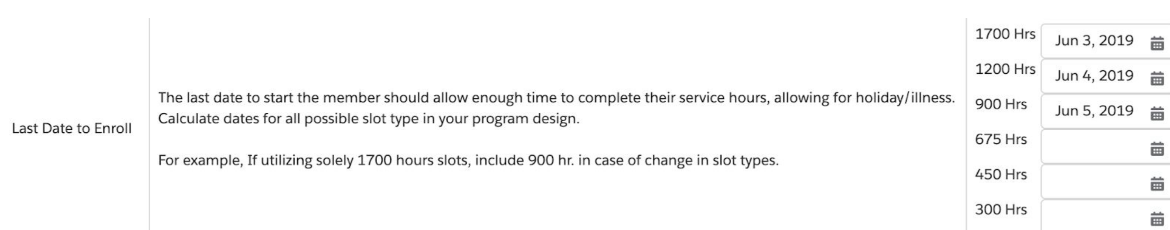
1.	The Contract Checklist process can be done within your Salesforce portal. To begin, click on the Contract Checklist Flow button on your Program.



2.	Each step of the Contract Checklist needs to be completed by your Program. For each step, complete the required information and click Save and Continue.

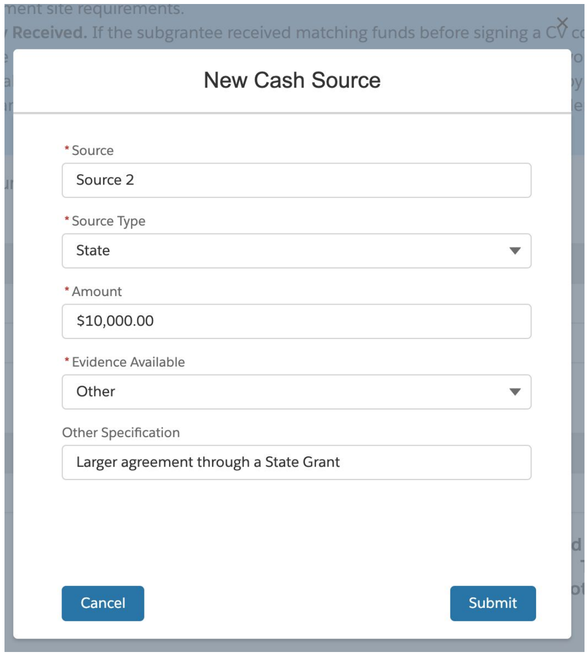


3.	Some fields not required you to complete such as all of the Last Date to Enroll fields because you may not have every slot type.

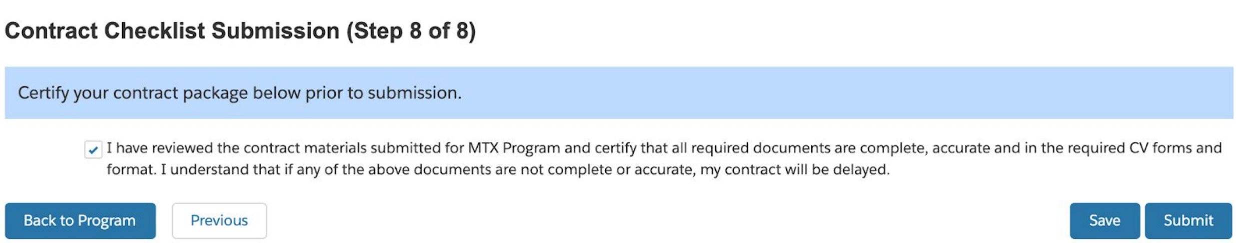


4.	You will be required to list all of your matched funding sources. You have the option of listing either Cash or In-Kind sources. To add a new source of either variety, click on its corresponding

	New button above its grid.

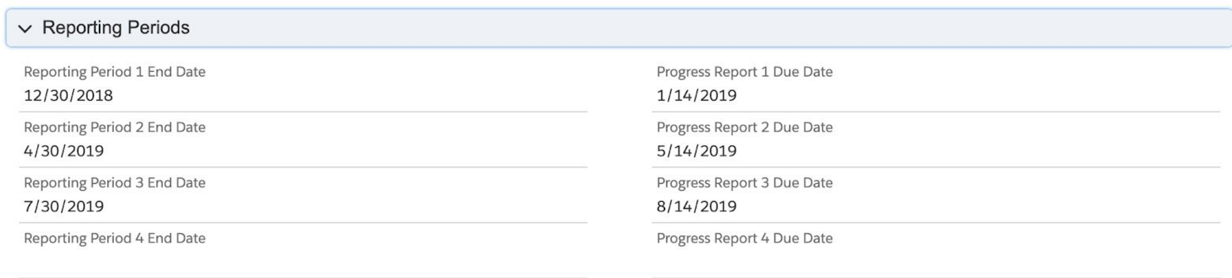


5.	You will be required to fill out all necessary details around that Source. If you have an evidence that is not categorized by the options for the Evidence Available field, please select Other and explain with as much detail as possible.
6.	Documents will need to be uploaded, and they follow the same process as described in the Program Readiness section.
7.	Once you have completed all required fields in the Contract Checklist, you will be able to submit for your Program Officer's review by clicking Submit.

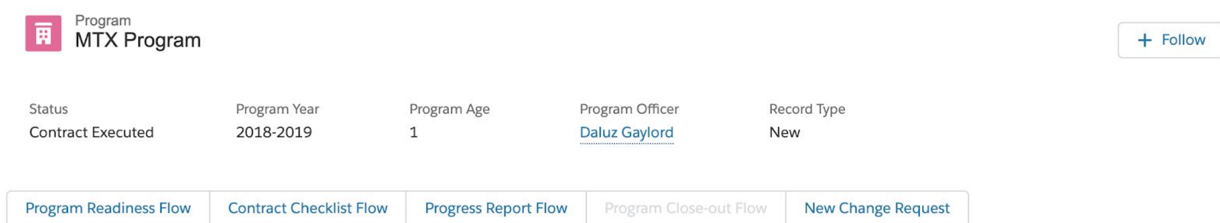


5. Completing Progress Reports

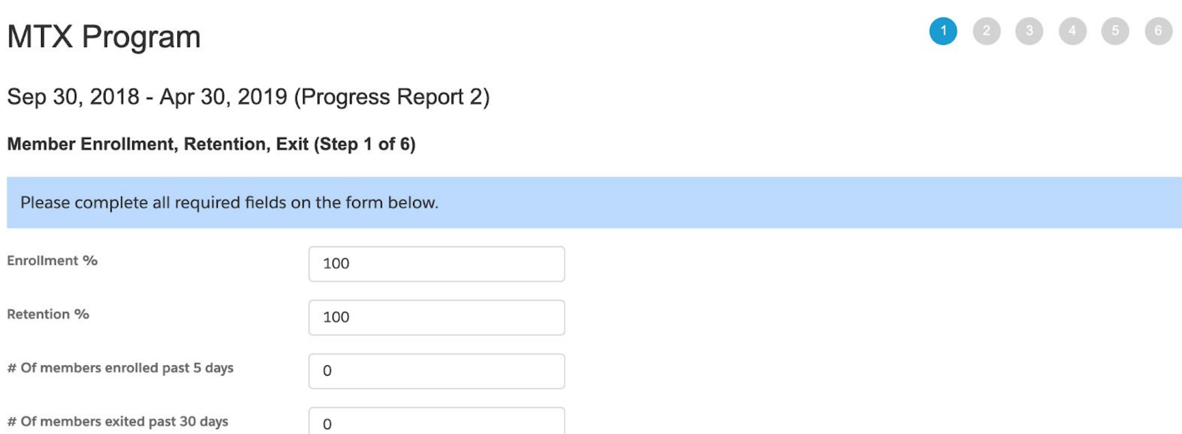
1. Progress Reports can be completed within the portal. Once your Program is active, your Progress Report due dates will be indicated on your Program in the Report Periods section.



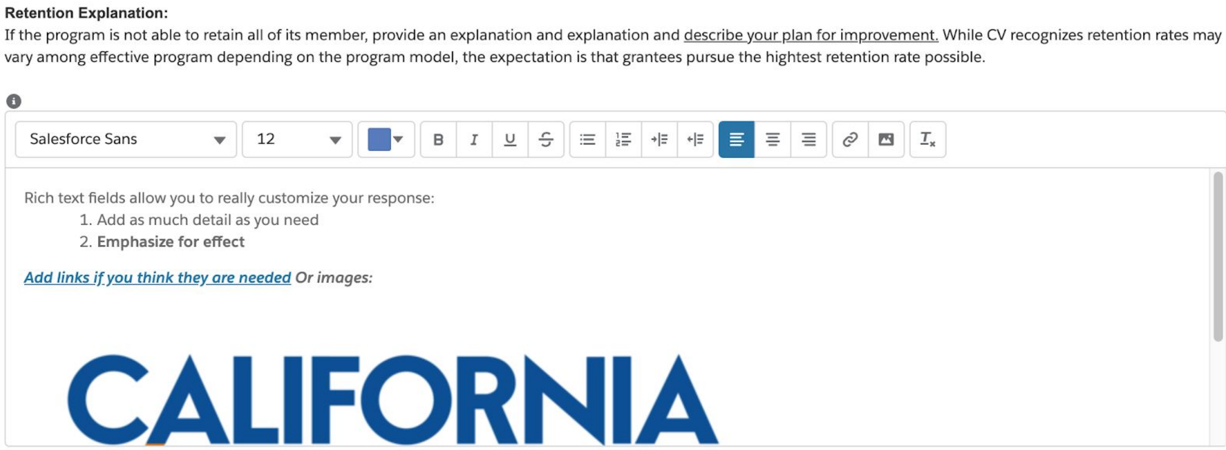
2. You can access your Progress Reports from the Program with the Progress Report Flow button.



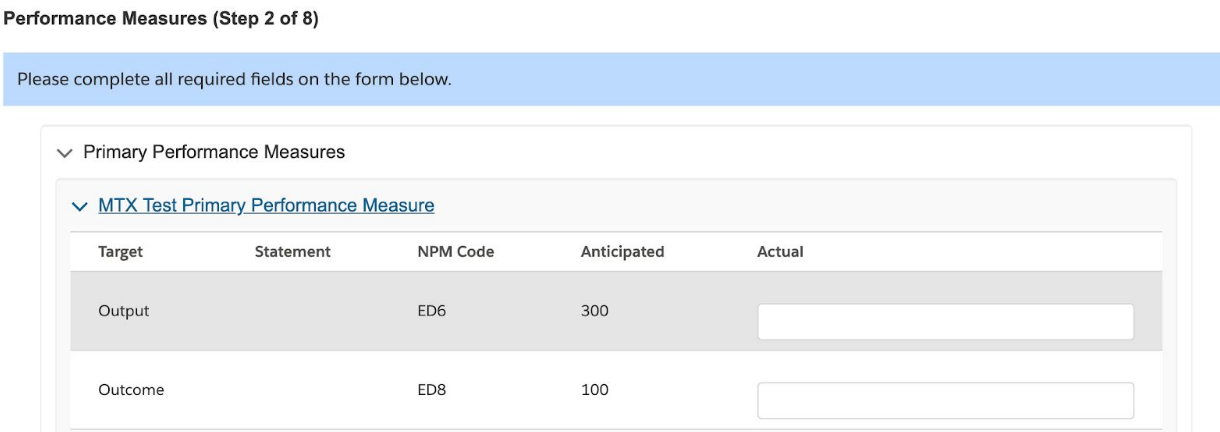
3. Progress Reports have a different page for each area where you need to provide information. Your Final Progress Report will have two additional pages of information you will be required to fill out.



4. Progress Reports sections provide all the tools you need to accurately complete your Progress Report. You can emphasize text, add formatting, and even images if they would be helpful.



5. You will recognize all of the Performance Measures you had put forth as you were applying for your Program. You will be able to easily report on each of the Performance Measures and Targets you put forth.



Performance Measures (Step 2 of 8)

Please complete all required fields on the form below.

Primary Performance Measures

MTX Test Primary Performance Measure

Target	Statement	NPM Code	Anticipated	Actual
Output		ED6	300	
Outcome		ED8	100	

6. When complete, attest to the accuracy of the Progress Report and click Submit to send it to your Program Officer.

Progress Report Submission (Step 8 of 8)

Please complete all required fields on the form below.

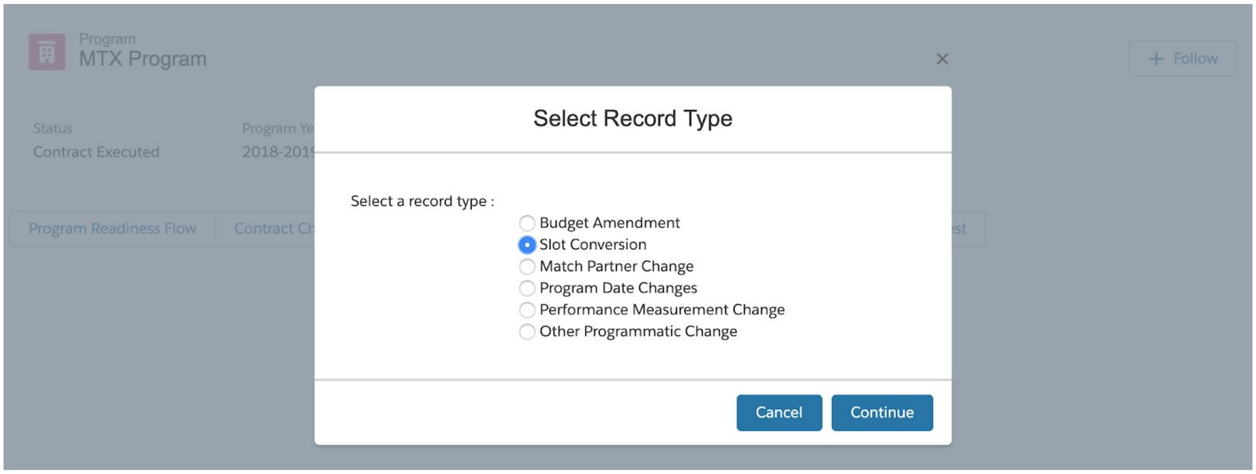
- [x] By Submitting this Final progress report, I attest that all information reported is truthful and accurate.
- [x] This report includes data for the current program year only, and all data is directly attributable to program activities.
- [x] I attest that the data reported has been validated for completeness, consistency, and accuracy, and that source documentation is retained.

Back to Program | Previous | Save | Submit

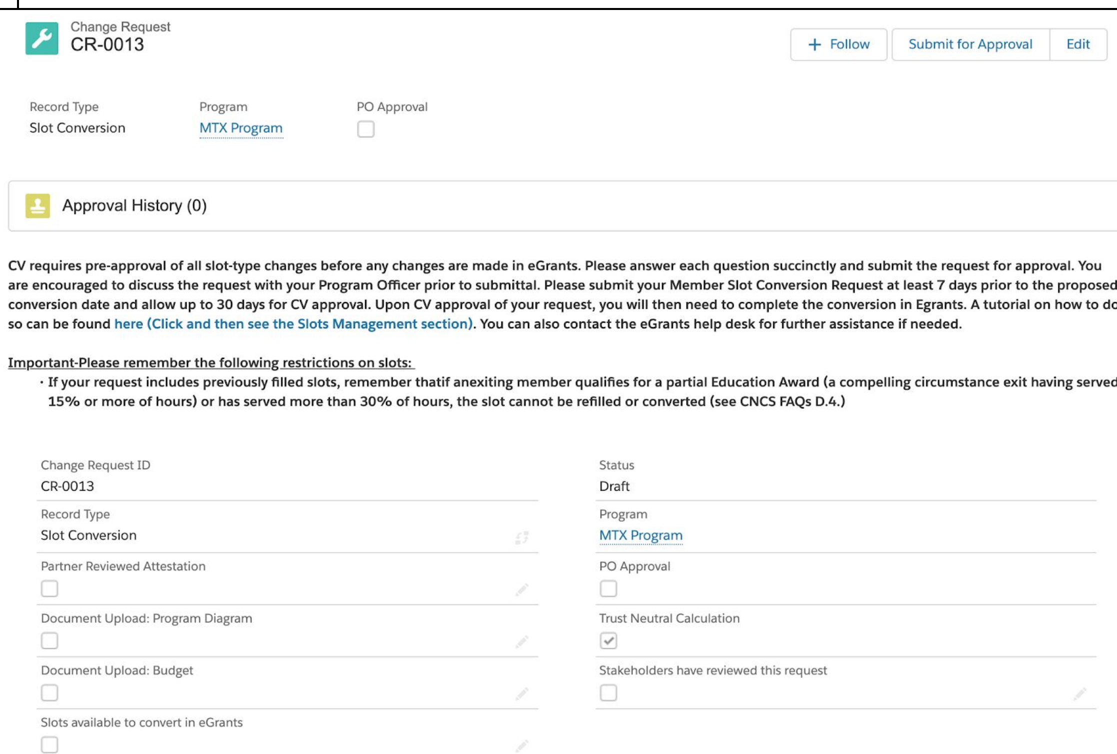
7.	Your Program Officer will review, and if revisions are needed they will reject your Progress Report and provide comments on the page where information needs correction.

6. Creating and Submitting Change Requests

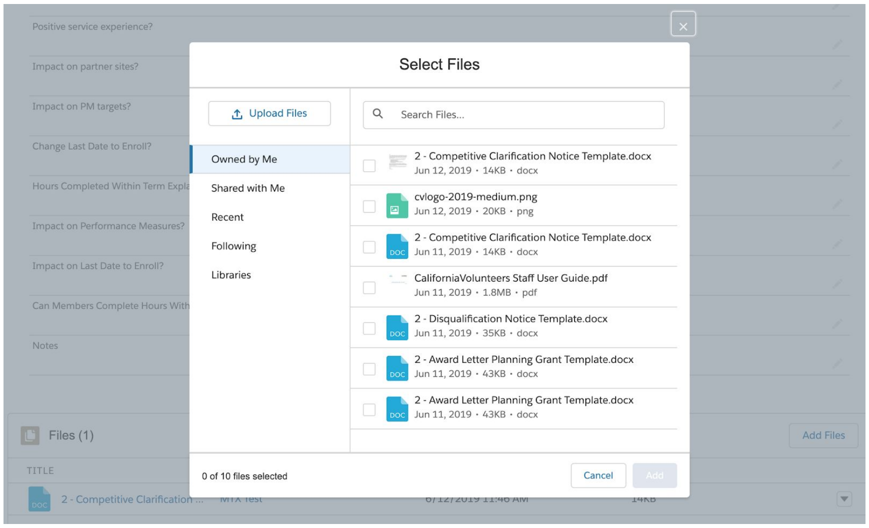
1.	Change Requests are now handled through the portal. To create a new Change Request, find the New Change Request button, choose the Change Request type you would like to make, and click Continue.



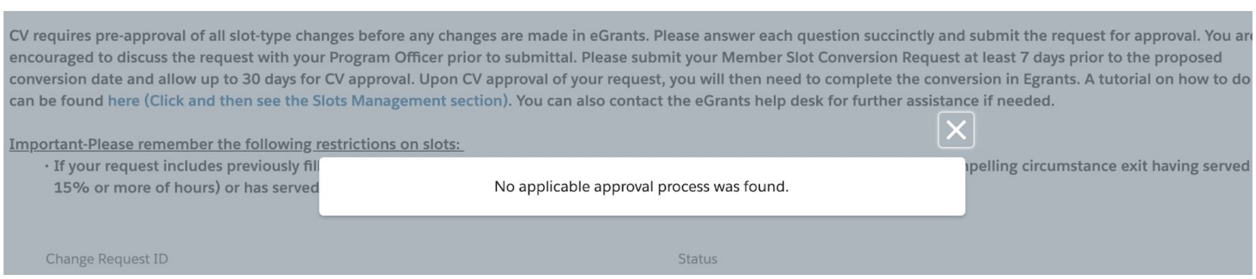
2.	The information required to submit will differ based on each Program. Each Change Request type will provide its own instruction on how to complete it.



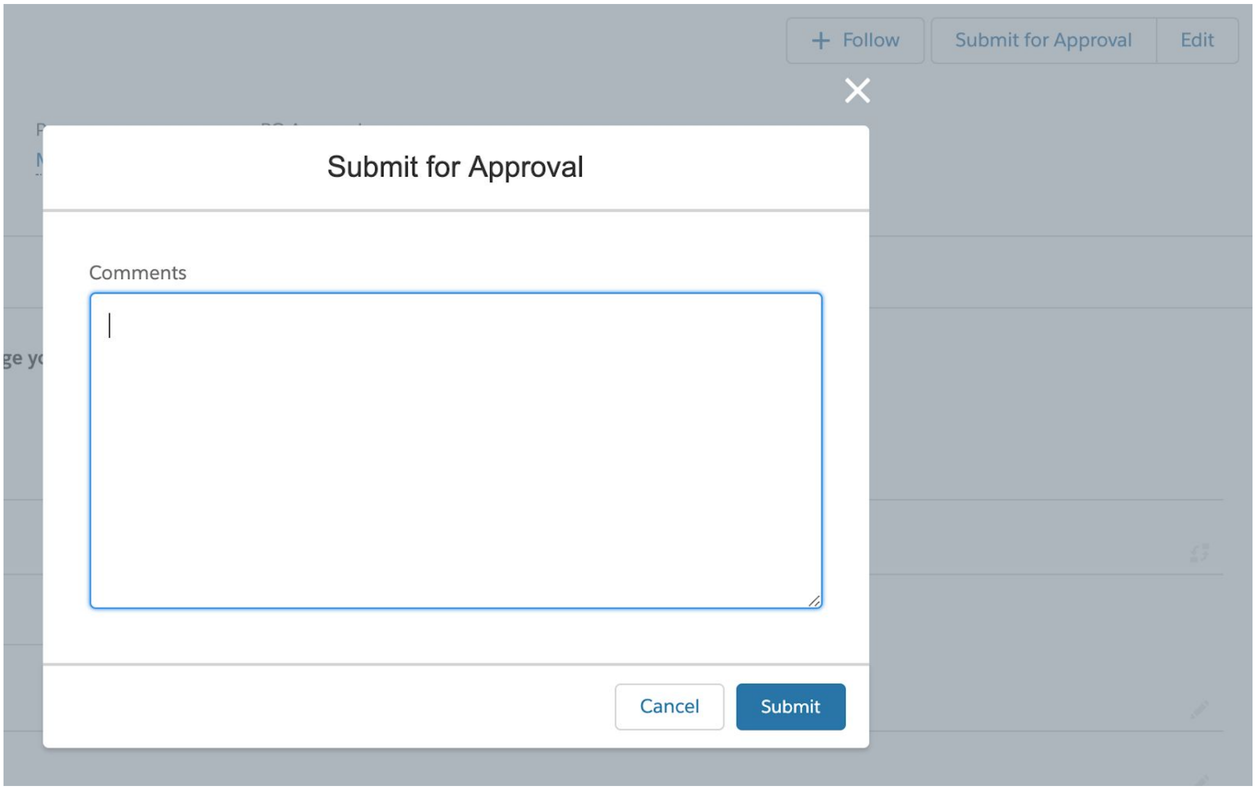
3.	All of the fields available for you to edit are usually required. Some Change Requests require uploaded files, which can be done at the bottom of the page. Find the section titled Files and click on New.



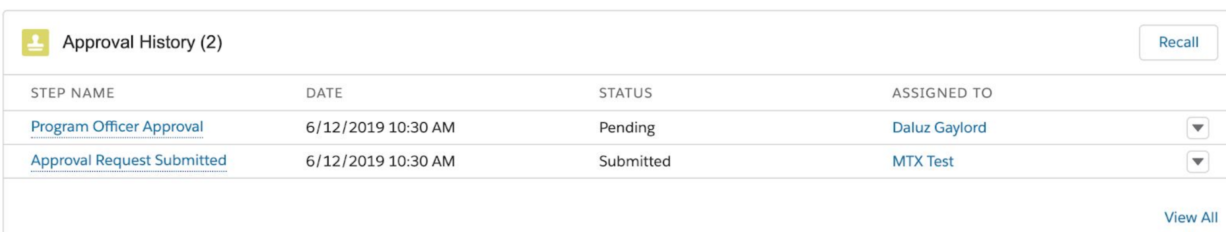
4.	If you have not previously uploaded the file, do so by clicking on the Upload Files button.
5.	Some Change Request types, such as a Slot Conversion, do not require you to enter values for Slots that you are not changing to. The system will not allow you to submit a Change Request without all of the required fields. If you see the error message below, it means you missed a field.



6.	To submit a Change Request, find the Submit for Approval button at the top of the page. Click on it, and then add comments if you think they are needed.



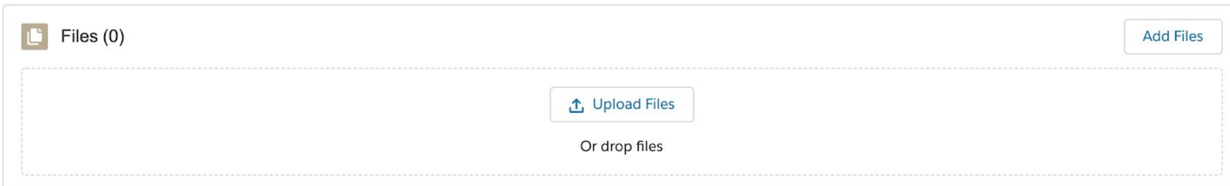
7.	Once you have submitted your Change Request, you can see the Approval History at the top of the record page. Your Program Officer will be notified of the Change Request right away, and will review and either Approve or Reject it.



8.	You will be notified via email of the status of your Change Request. If you have any further questions, please reach out to your Program Officer directly.

7. Uploading Miscellaneous Files

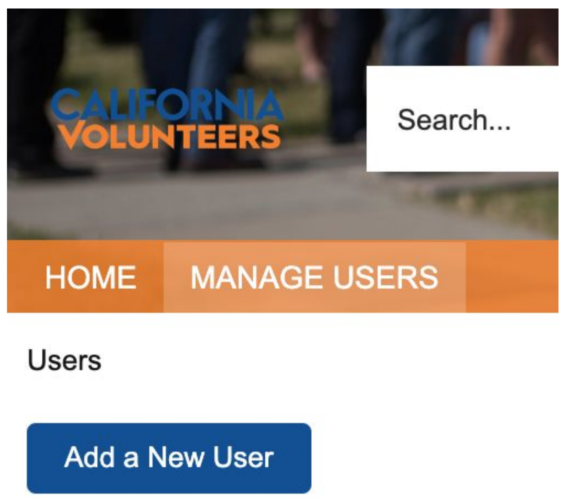
1.	You can always upload a file to Salesforce instead of emailing it where it can be easily lost. To do so, on your Program page navigate to the bottom Files section.



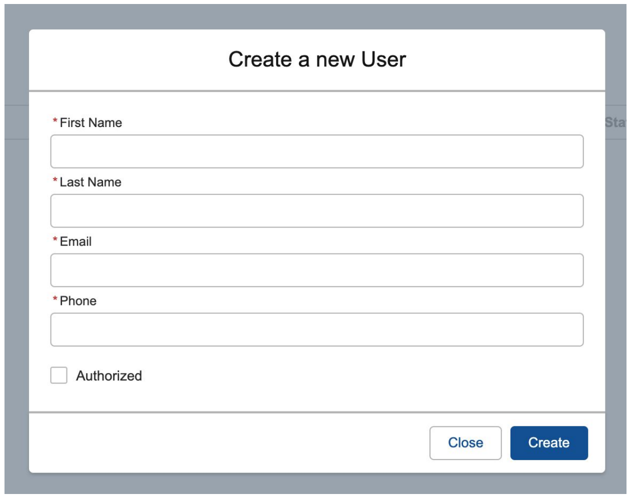
2.	Drag and drop any file to upload it right into Salesforce. Your Program Officer will be able to access it in Salesforce.

8. Managing your Users

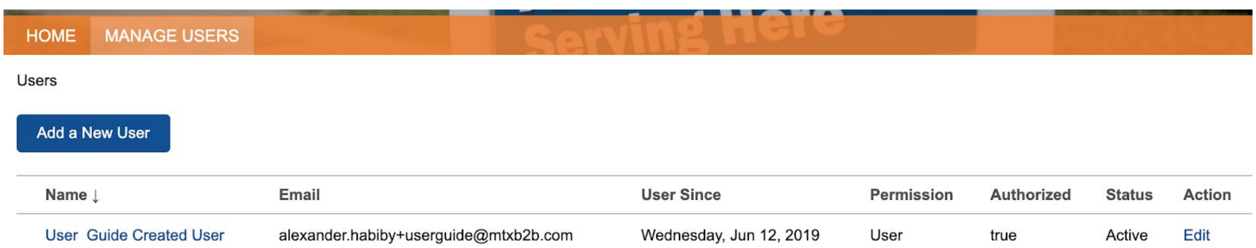
1.	As the Primary Legal Applicant for a Program, you are allowed to create other Users to manage your Program.
	All Users have access to all Programs associated with your Organization. If you Organization has multiple Programs then every User you create will be able to see all of the Programs. Please be aware of this before creating Users, and if you have concerns around this please reach out to your Program Officer.
2.	To manage your Users navigate to the Manage Users tab next to the Home tab.



3.	The Manage Users tab shows all of the Users associated with your Account. To add a new User, click on the Add a New User button.



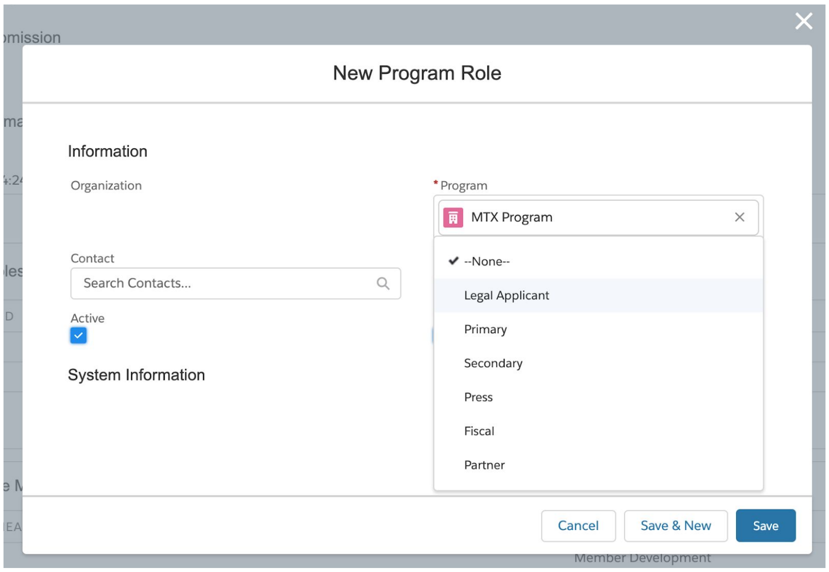
4.	You are required to add the First Name, Last Name, Email, and Phone Number of the prospective User. Authorized refers to whether that User is allowed to officially submit on your behalf. Click Create when you are ready to create and notify that User.
	Non-authorized Users can review Program information, fill out details in all of the flows, and create and submit Change Requests, but cannot submit for approval Program Readiness, Contract Checklist, Progress Reports, or the Program Close-out.



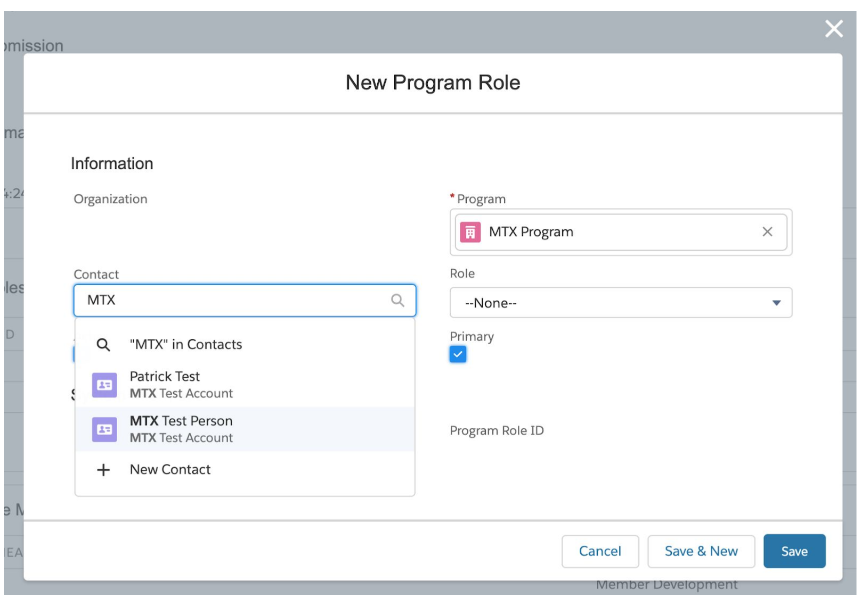
4.	Once created, you can edit a User’s information and deactivate them at any time. Only the Primary Legal Applicant can create and manager Users.

9. Adding a Program Role

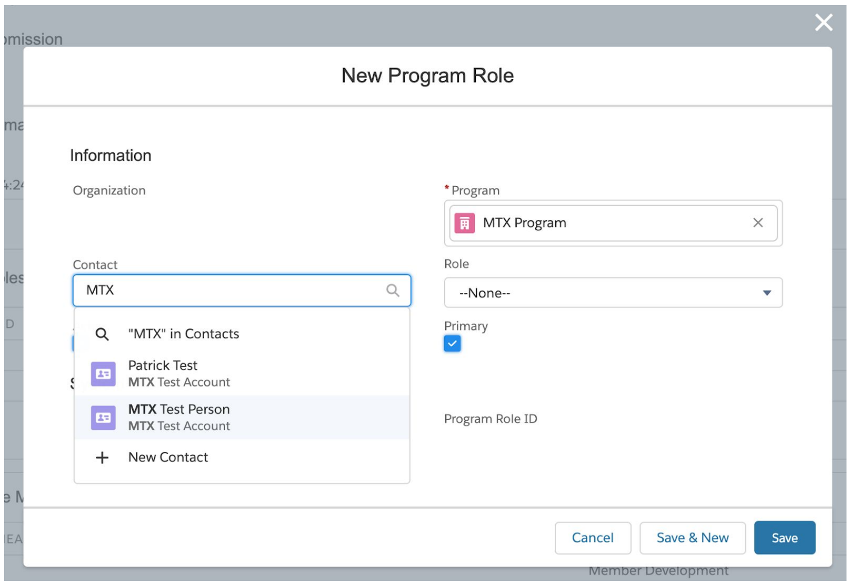
1.	You can indicate which people do what in your Program, and you can even associate Users you created to access Salesforce. Find the Program Roles section on your Program page and click New.



2.	You will be able to indicate what capacity the person serves on your Program by the Role field. You must associate a Program role with a Contact. A Contact is any person that is inside Salesforce (your User is a Contact and is already associated with the Program).



3.	Search first if the person you are looking for is in the system. If not, you can create a new Contact. You must fill out the information accurately and provide an email or phone for that person. The Account Name for your new Contact is always your Organization.



4.	Click save on both the new Contact you created (if you created one) and the Program Role to save the Program Role.