



KCRHA
King County Regional Homelessness Authority

**KCRHA Grants Management System Guide
(Salesforce) v 1.0**

September 5, 2024

KCRHA Grants Management System (Salesforce)

The KCRHA Grants Management System is the Salesforce Experience portal designed to empower our providers with the following:

- Add a new user to your Agency account
- Submit a proposal for a funding opportunity
- Track the status of your pending proposal
- Review your current grants, fund availability, and report due dates
- Submit requests for reimbursements and monitor your payments
- Access Funding Portal Training Resources

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?

Account Management

This section outlines how to manage your account in the Salesforce Experience portal.

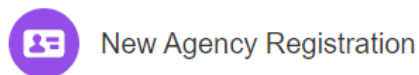
How to Create a New Account

Before an organization can apply for funding on our Portal, they have to register their organization.

1. To register a new organization, click on the “Register Your Agency” button near the



2. The New Agency Registration page will open and Application Denial and Appeal will prompt you to enter your agency’s UEI number. Enter it in the box beneath UEI:



Please enter your 12 digit UEI below and hit Enter

*UEI

Complete this field.

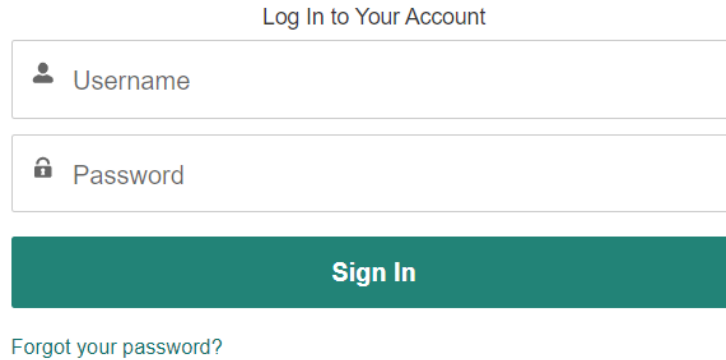


3. If no duplicate UEI is found, you will then be prompted to enter in your contact information. If a duplicate UEI is found, an account has already been created for your agency. Follow the instructions in the **How to Reset Your Password** section for next steps.
4. Click “Submit.” You will be navigated to the portal’s homepage.

How to Log In

To log into the new grants management portal, navigate to the new grants management portal on our website: <https://kcrha.org/>.

You will be prompted to enter your login credentials:



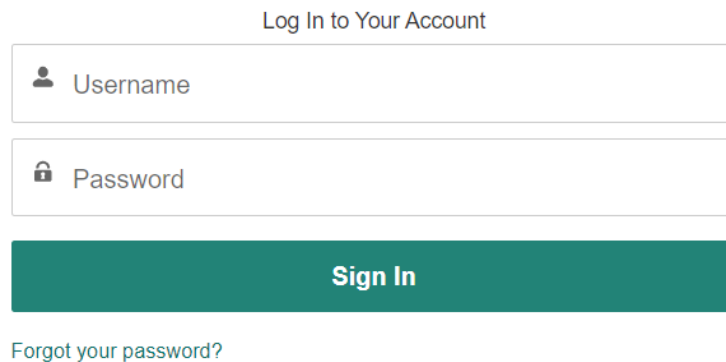
The screenshot shows a login form with the title "Log In to Your Account". It contains two input fields: "Username" with a person icon and "Password" with a lock icon. Below the fields is a green "Sign In" button. Underneath the button is a link that says "Forgot your password?".

Enter the username and password used in the previous grants management portal and select "Sign In."

How to Reset Your Password

If you've forgotten your password, you can reset it by following the steps below:

1. Navigate to the grants management portal login screen.
2. Select the "Forgot your password?" Text below the green "Sign In" button:




This is a duplicate of the login form shown in the previous image. It features the title "Log In to Your Account", "Username" and "Password" input fields, a green "Sign In" button, and a "Forgot your password?" link below the button.

3. You will be navigated to the "Reset Password" page. Enter your username in the box and select "Reset Password."

PASSWORD RESET

To reset your password, we'll need your username.
We'll send password reset instructions to the email
address associated with your account.

 Username

Reset Password

[Cancel](#)

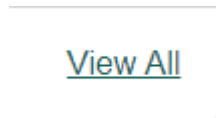
4. Next, check the email account associated with your username for instructions on resetting your password. Remember to look in your spam folder, where automated messages sometimes filter. If you still can't log in, contact GrantAdmin@kcrha.org for assistance.

User Management

This section outlines how to manage the users associated with your account in the grants management system.

Viewing Existing Users

1. Navigate to “My Account” near the top of the page.
2. Navigate to the “Contacts” table on the right side of the screen and click on the “View All” text near the bottom of the section:



3. You will be navigated to a new page with a list of all the contacts associated with your account. Below is some guidance on what is tracked on these contact records:
 - a. If a user has “Portal User Enabled” set to true, they will be able to log into the portal.
 - b. If a user has “Primary Contact” set to true, they are the Primary Contact for the account.
 - c. If a user has “Primary Signatory” set to true, they will receive all contracts in need of signature for the account.

| Enabled Portal User | Primary Contact | Primary Signatory |
|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Adding a New User

1. Navigate to “My Account” near the top of the page.




Home

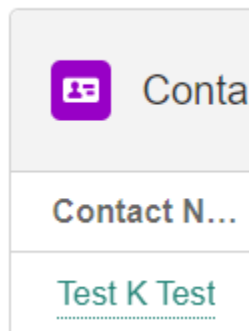
My Account

2. Click on “New Contact” on the right-hand side of the screen, above the “Contacts” section.

NEW CONTACT

 Contacts (1)

3. Enter in the contact information of the new user. Please confirm that the email is correct before moving forward.
4. Select “Next” at the bottom of the new contact screen.
5. The new contact will now appear in the “Contacts” section. To provision the new contact with login access, click on its name in the Contacts table. This will be the left-most column.



6. You will be navigated to the contact record. Click the green “Grant Portal Access” button in the center of the page.

GRANT PORTAL ACCESS

7. When prompted, select “Activate User.” This will enable the contact to log into your account.

Activate Contact for Portal?

Before activating a contact for portal access, please ensure their email address is correct and up to date. Once activated, they'll receive an email with login instructions. Double-check the contact's details to ensure a smooth activation process and avoid any issues with their portal access.

Cancel

Activate User


Updating the Primary Signatory


Only the Primary Contact on the account is able to update the account's Primary Signatory. The Primary Signatory is the person who is responsible for signing contracts on behalf of the account.

1. Navigate to "My Account."
2. Near the middle of the page, there is a section called "Contact Information." Find the "Primary Signatory" field in this section and click the pencil icon next to it.

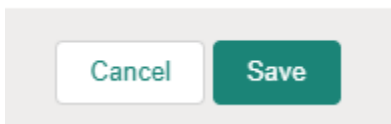
Key Contacts

Primary Contact ⓘ
[Test User](#)

Backup Contact 

Primary Signatory ⓘ
[Test User](#) 

3. Search for the name of the contact who should be the new Primary Signatory. Note that every account should have a Primary Signatory; this field cannot be left blank.
 - a. If you cannot find the relevant contact, check the Contacts section of the page to confirm if their contact record has been created. Create a new record if needed, following the guidance in the Adding a New User section above.
4. Once you've made your changes, click Save near the bottom of the screen, or select Cancel if you want to revert your changes.



Deactivating a User

Only the Primary Contact of the account is able to deactivate contacts for the account. This is helpful when someone leaves an organization, and their information is no longer needed on the portal.

1. Navigate to "My Account."

2. On the Contacts menu on the right side of the screen, click on the text in the first column, which contains the name of the user whose access needs to be revoked.

| Contact N... | Email | Enabled Po... | Primary Co... |
|---------------------------|----------------|-------------------------------------|--|
| Test User | test.user@t... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> <input type="button" value="▼"/> |

[View All](#)

3. Select the “Restrict Portal Access” button in the middle of the page:

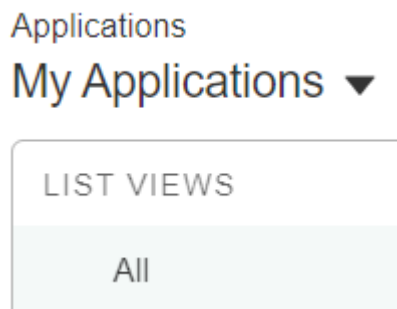
RESTRICT PORTAL ACCESS

Application Management

This section outlines how to manage your applications in the grants management system.

Viewing Existing Applications

1. Click on “My Applications” near the top of the page.
2. You will be navigated to the Applications page, which will contain a list of the applications you have created for the current account.
3. To see all the applications associated with the current account, select the down icon beside “My Applications” and select “All.”



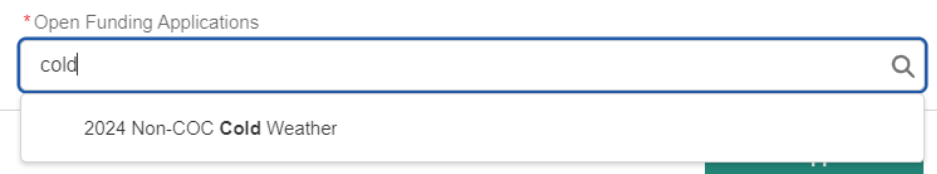
Creating an Application

1. Navigate to “My Applications” and select “Apply for New Funding Opportunity.”



[APPLY FOR NEW FUNDING OPPORTUNITY](#)

2. A pop-up menu will appear, prompting you to indicate which request for proposal or qualification you wish to apply for. Begin typing in the “Open Funding Applications” field to filter the available options:



3. Once you’ve identified the RFP you wish to apply for, select the “Create Application” button.

* Open Funding Applications

2024 Non-COC Cold Weather



Create Application

4. The page will refresh and navigate you to the Application you just created.

Managing Application Collaborators

If other people at your agency are helping you submit the application, you can grant them access to the application by following the steps below:

1. On the “My Applications” page, click into the relevant application by clicking on the link in the Application Name column.

| Application Name ↑ ↓ | |
|----------------------|----------------------------|
| 1 | App-003393 |

2. Select the “Manage Collaborators” button on the right-side of the screen.

Manage Collaborators

3. A screen will pop up, asking you if you want to add or remove collaborators. Select “Add.”

Manage Collaborators

Would you like to add or remove Collaborators?

Add

Remove

4. A list of contacts associated with your account will appear like the one below. Click on the radial icon beside the name of the contact you wish to add to the application and select “Add Collaborators.”


Please select collaborators from your agency to grant Read and Edit access to this application.

Note: If the desired user is not listed, contact your agency's Primary Contact to add them as a contact and/or enable them for portal access.

Primary Contact:

Name: Test User

Email: test.user@test.com

| 1 of 1 item • 1 item selected | |
|---|------------------------|
| Full Name | Email |
|  Tester Test | ✉ tester.test@test.com |

[Previous](#) [Add Collaborators](#)

- a. If you receive a “No Contacts Found” message, confirm that you have other contacts associated with your account by following the steps in the Adding a New User section. If there are, please reach out to grantadmin@kcrha.org for assistance.

Filling out an Application

1. On the “My Applications” page, click into the relevant application by clicking on the link in the Application Name column.

| | Application Name ↑ |
|---|----------------------------|
| 1 | App-003393 |

2. Each application has different sections, organized on the left-side of the page, under the “Application” tab.

Application Details

- Submission Instructions
- Agency Experience and Proposed Approach
- Staffing
- Racial Equity & Social Justice
- Partnerships
- Data
- Budget Requirements
- Budget
- Conflict of Interest
- Required Documents

3. Guidance on how to fill out the application will be provided in the “Submission Instructions” section. Once you’ve reviewed, select “Save & Next” at the bottom of the page.

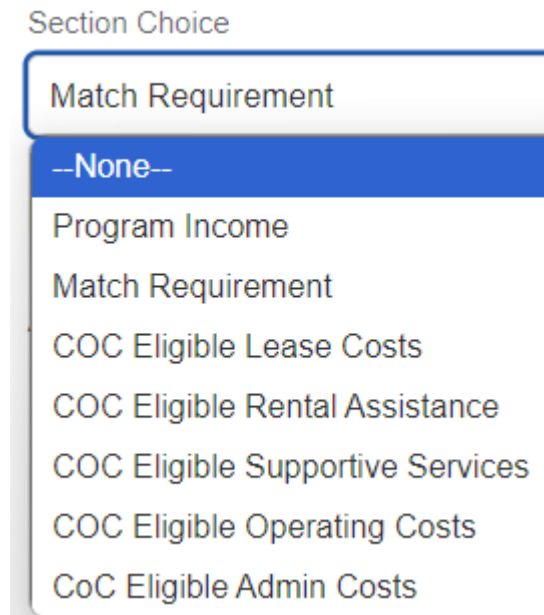


- a. Once you have completed a section by answering the questions and clicking “Save & Next,” the icon beside its name will turn green.
4. To upload documentation, click the “Upload Files” button. File explorer will appear, allowing you to search for and upload the requested document.
 5. To complete the application, navigate to each section of the application and fill out the questions. To save your progress in a section, select the “Save For Later” button at the bottom of the screen.

Filling out a Budget

This section provides guidance on filling out the Budget section when completing an application.

1. Navigate to the “Budget Requirements” section of the application. Click on the Section Choice drop down to see the requirements for each category.



Section Choice

- Match Requirement
- None--
- Program Income
- Match Requirement
- COC Eligible Lease Costs
- COC Eligible Rental Assistance
- COC Eligible Supportive Services
- COC Eligible Operating Costs
- CoC Eligible Admin Costs

2. Navigate to the “Budget” section of the application.



3. Select the “Create Personnel Table” button to add fields related to any personnel needed for the project and the associated costs, including benefits.

Create Personnel Table

4. Enter in requested amounts for each line item by editing the boxes below each section:

2100 Office Supplies

\$0.00

300


- To add additional line items, select the plus icon on the section header.



- For COC applications, you can specify if you have a match source. To add a match source to your budget, select the “Create Match Source” button.



- A field will appear, prompting you to enter the name of the entity matching the funds. Enter the name and select “Next.”
- The page will reload. Upon scrolling back to the budget table, you should now see a column with the name of your funding match. For any applicable line item, enter in the match amount.

| Assessment of Service Needs | \$3,000.00 | + | Test Account |
|-----------------------------|---|---|---|
| Item A | <input type="text" value="\$3,000.00"/> |  | <input type="text" value="enter number"/> |

- Once you’re done updating the budget, select “Save & Next.”

Submitting an Application

After completing all sections, the “Submit Application” button will appear at the bottom of the page. Click this to submit the application for KCRHA’s review.


Application Details

- ✓ Submission Instructions
- ✓ Agency Experience and Proposed Approach
- ✓ Staffing
- ✓ Racial Equity & Social Justice
- ✓ Partnerships
- ✓ Data
- ✓ Budget Requirements
- ✓ Budget
- ✓ Conflict of Interest
- ✓ **Required Documents**

Checking an Application's Status

The status of an application can be viewed on the "My Applications" page, in the "Application Status" column.

Applications

My Applications ▼ 

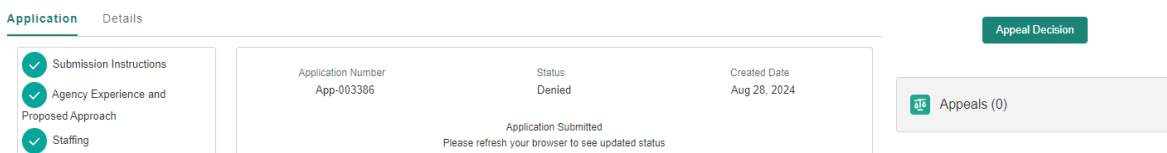
1 item • Sorted by Application Name • Filtered by All applications

| | Application Name ↑ ▼ | Application Display Name ▼ | Status ▼ | |
|---|----------------------|----------------------------|-----------|---|
| 1 | App-003393 | 2024 Non-COC Cold Weather | Submitted | 1 |

Application Denial and Appeal Process

If your application is denied, you will receive an email update, and the status of the application in the grants management portal will change to Denied. You have 5 business days to appeal the decision. Please find guidance below on how to proceed with an appeal:

1. Navigate to the relevant application.
2. Click on the "Appeal Decision" button now available on the right-side of the screen.



The screenshot shows the 'Application Details' page for application 'App-003386'. The status is 'Denied' and the created date is 'Aug 28, 2024'. A message indicates 'Application Submitted' and 'Please refresh your browser to see updated status'. On the right side, there is a green 'Appeal Decision' button and a grey 'Appeals (0)' button.

3. A message will display, providing further guidance on the appeal process. You will be able to proceed after selecting "Continue."
4. Next, you will be prompted to confirm the Individual responsible for the appeal. Contacts can be selected if they are associated with the agency.

The specific funding opportunity title:
COC 2024 Shelter Protection

Please select the Individual responsible for then appeal. The individual selected will receive updates and communications about the status of the appeal.

* Individual Responsible For Appeal

Previous

Create Appeal

- Upon selecting "Create Appeal," you will be shown the message below. After selecting "Acknowledge," you can continue filling out the appeal form.

Appeal

Notice

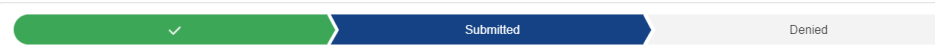
Your appeal has been created but **Has Not Yet Been Submitted**. Please fill out the appeal form to provide the required details. When finished, click the 'Submit Appeal' button to submit your appeal for review.

As a reminder, your appeal must be submitted by 11:59pm PST on September 5, 2024.

[Acknowledge](#)

- On the appeal form, fill out all available fields. Once the appeal form is complete, Select the "Submit" button. The record will move to the "Submitted" status.

| | | | | |
|---------------------|---------------------------|--------------------------------------|----------------------------------|---|
| Status Submitted | Appeal Due By 9/5/2024 | Submitted Date 8/29/2024, 3:09 PM | Decision Due By Date 9/5/2024 | Appealing Individual Test K Test |
|---------------------|---------------------------|--------------------------------------|----------------------------------|---|



Appeal Submitted

This appeal has already been submitted and can not be edited unless returned by KCRHA staff


- You will receive an email alert, confirming that KCRHA has received your appeal.

Checking an Appeal's Status

You can view the status of your appeal post-submission by following the steps below:

- Navigate to the My Applications tab near the top of the page.
- Click on the application with a Status of "Appeal."


Applications

My Applications ▼ 

1 item • Sorted by Application Name • Filtered by All applications

| | Application Name ↑ ▼ | Application Display Name ▼ | Status ▼ |
|---|----------------------------|-----------------------------|----------|
| 1 | App-003386 | COC 2024 Shelter Protection | Appeal |

- Review the "Appeals" table now present on the right-side of the screen. This table will tell you the Status of your appeal, the date it was submitted, and the decision deadline.

|  Appeals (1) | | | | |
|---|-----------|-----------|-----------|----------------------------------|
| Appe... | Status | Submi... | Decisi... | |
| Appe... | Submit... | 8/29/2... | 9/5/2024 | <input type="button" value="▼"/> |
| View All | | | | |

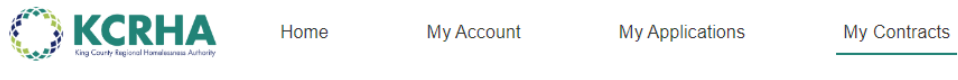
4. Click on the green text in the first column to navigate to the Appeal record to see a copy of the appeal form you submitted.

Contract Management

This section outlines how to manage your contracts in Salesforce. Contracts are created once your application is awarded.

Viewing Existing Contracts

1. In the Grants Management portal, click on the “My Contracts” tab.



2. You will be navigated to a page that lists the Contracts associated with your account.
3. Click the down arrow beside “All Contracts” to see the Contracts organized in different ways.



Updating the Contract Budget

Once KCRHA staff have assigned funding sources to your proposed budget, an email notification will be sent to inform you that the budget is ready for you to review and update your funding allocations. The steps below provide guidance on how to review the budget associated with a pending contract:

1. In the Grants Management portal, click on the “My Contracts” tab.
2. Navigate to the Contract you need to review the Budget for.
3. On the right side of the screen, a table called “Budgets” will be available. Click on the text in the first column to navigate to view the Budget.

| Budgets (1) | | | |
|--------------------------|---------|--------------------|--------------------|
| Budget Name | Status | Budget Type | Last Modified Date |
| BU-25597 | Planned | Budget Category GF | 8/30/2024, 8:07 AM |

[View All](#)

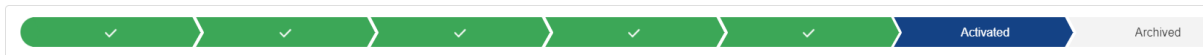
4. Update the amounts on the budget as necessary.

5. To submit the budget, click the Submit button in the upper-right side of the screen.

Submit

Signing a Contract

1. Once a contract has been reviewed and the budget finalized, it is ready to be signed. It will first be sent for review and signature to the Signatory on your account.
 - a. Instructions to view or modify your account's signatory are available in the Updating the Primary Signatory section. Please confirm that the Primary Signatory's email is accurate.
2. Once your primary signatory has signed, the contract will be sent to KCRHA's signatory for review and signature.
3. Once all parties have signed, the Contract status will update to Activated.



Amending a Contract

1. Navigate to the contract you need to amend in the portal.
2. Select the "Request Amendment" button in the upper-right corner of the page.

Request Amendment

3. A screen will pop up, prompting you to specify the type of amendment you are requesting. Select one of the options, then press "Next."

* Please select the type of amendment you wish to request below

--None--

--None--

Increase

Decrease

Category Change

Change in Scope

Other

Funding Swap

- The next screen will prompt you to specify changes to the contract end date and summarize any modifications to the project’s scope. Enter any information that is helpful.

* Do you need to amend contract end date?

No

* Summarize any changes to the project that you plan on making.

Complete this field.

Create Amendment

- When you’re finished, select “Create Amendment.”
- The screen will refresh and navigate you to your newly created Amendment record. Here you can modify data you entered previously, amend your contract’s budget, and submit the record.
- Once the amendment is ready to go, select the “Submit Amendment” button in the upper-right corner of the page. This will send the amendment to KCRHA staff to review. The contract being amended will shift to the “Amendment” Status.

Submit Amendment

8. KCRHA staff will review the amendment request. If approved, a new contract may be sent for signature. Please see the Signing a Contract section for guidance.

Invoice Management

This section outlines how to manage your invoices in Salesforce. Once a contract is Activated, invoices, or reimbursement requests, can be processed through the portal.

Viewing Existing Disbursements

Click on the My Disbursements tab near the top of the screen. You will be navigated to a list of all disbursements associated with your account.

Disbursements can have the following statuses:

| | |
|--------------------------------------|--|
| New | This status is automatically applied to disbursements that have yet to be submitted. |
| Submitted | Submitted disbursements have been submitted to KCRHA for processing. |
| Returned for More Information | This status is applied to disbursements that have been reviewed by KCRHA staff and returned to the agency for more information. Check the Return to Applicant Reason field on the Disbursement for more information. |
| Approved | Disbursements that have been reviewed and approved by all relevant KCRHA parties shift to the Approved status. |
| Processing | Disbursements that are in the process of being paid are in the "Processing" status. |
| Paid | Once funds have been released for a disbursement, the status will shift to Paid. |
| Cancelled | If a disbursement is cancelled for any reason, the status will shift to cancelled. |

Creating a Reimbursement

1. Click on the My Contracts tab near the top of the screen, and click on the name of the contract you are ready to request reimbursements on.
2. You will be navigated to the Contract. Click on the Request Reimbursement button in the upper-right corner of the screen.

Request Reimbursement

3. A screen will pop up, prompting you to specify the Funding Period and Funding Year for the new Funding Disbursement. Enter this information and select “Next.”

Please select the Funding Period and Funding Year for the new Funding Disbursement.

*Funding Period *Funding Year

--None-- --None--

Next

4. Another screen will load, prompting you to enter additional information about the disbursement. Enter the following information as suits your situation and select “Next:”
 - a. Invoice Amount: enter the amount you are requesting.
 - b. Invoice Date: enter the date of the invoice
 - c. Comments: enter in any additional information that would be helpful for KCRHA to know for processing the disbursement.
5. The final step will ask you to upload any supporting documentation you have available. Click on the “Upload Files” text to pop open your file browser and find the relevant documentation or drag and drop the file into the box as instructed.

Please upload any documentation supporting your invoice

Upload Files Or drop files

Next

- a. Here’s a list of relevant documentation:
 - i. Posted General Ledger (GL) detailing costs.

- ii. De-identified, Client Disbursement Log for all rental assistance or flexible fund client assistance payments.
 - iii. Payroll ledgers, if applicable
 - iv. Monthly HMIS report
 - b. Quarterly Narrative Report
6. Select “Next” once all relevant documentation has been attached. You will be navigated to the disbursement you created, where you can review your entered data, upload additional documentation, and customize how your disbursement will be applied to your budget.
- a. To customize your disbursement and apply it to your available funding sources, navigate to the section you are requesting reimbursement for and type in the amount.

✓ SUPPORTIVE SERVICES

| | Awarded | WA548L-COC-23- |
|-----------------------------|----------|----------------|
| Assessment of Service Needs | \$833.00 | \$833.00 |
| | \$300.00 | \$300.00 |

- b. Select the “Save Disbursement” button near the top of the budget to save your changes.

Save Disbursement

Values will only be recorded once budget funding is saved.

You have unsaved changes. Press “Save Disbursement” to commit your changes

7. Once the disbursement is set to go and ready to be reviewed and processed by KCRHA staff, click on the “Submit” button near the upper-right side of the page. The status of the reimbursement will shift to “Submitted.”

Submit