KCRHA Grants Management System Guide (Salesforce)

January 27, 2025

KCRHA Grants Management System (Salesforce)

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

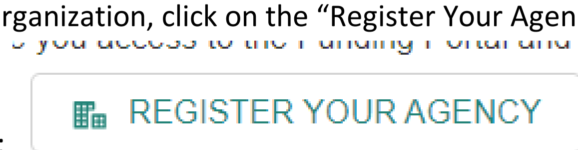
- Add a new user to your Agency account
- Submit a proposal for a funding opportunity
- Track the status of your pending proposal
- Review your current grants, fund availability, and report due dates
- Submit requests for reimbursements and monitor your payments
- Access Funding Portal Training Resources

Account Management

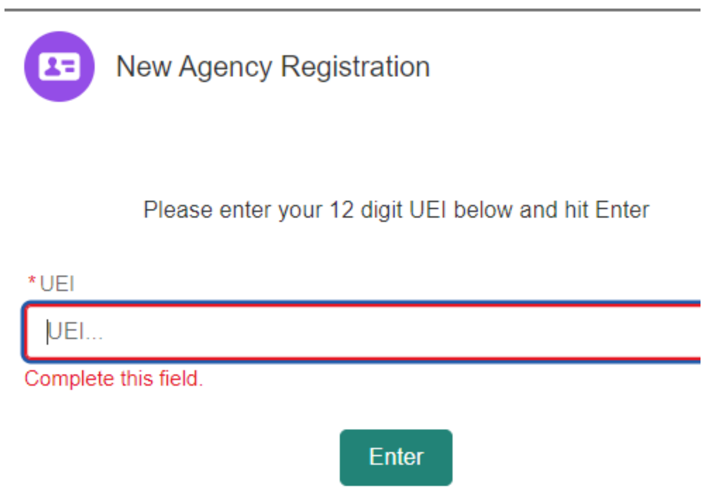
This section outlines how to manage your account in the Salesforce Experience portal.

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 middle of the page: 

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:

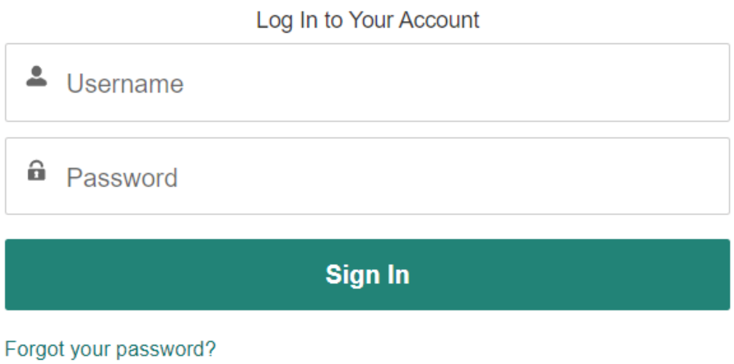


3. If no duplicate UEI is found, you will then be prompted to enter in your contact information. If a duplicate UEI is found, an account has already been created for your agency. Follow the instructions in the **How to Reset Your Password** section for next steps.
4. Click “Submit.” You will be navigated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

How to Log In

To log into the new grants management portal, navigate to the new grants management portal: https://kcrhagrants.my.site.com/fundingprograms

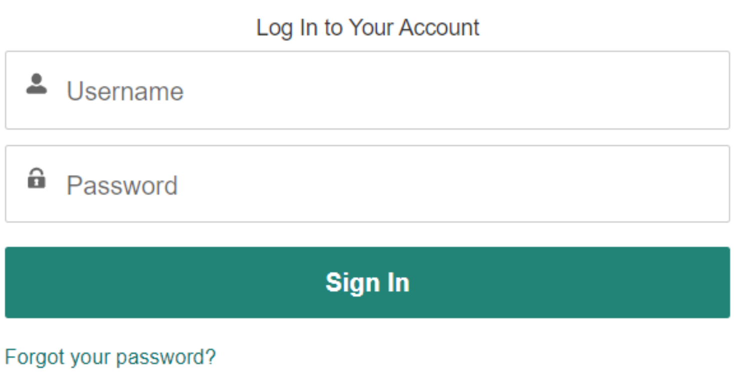
You will be prompted to enter your login credentials. If it is your first time logging in, follow the guidance below to reset your password.



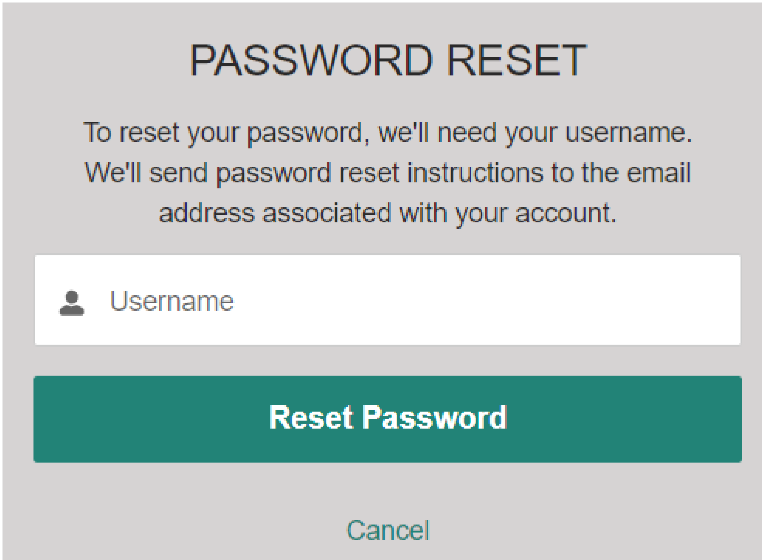
How to Reset Your Password

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:



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



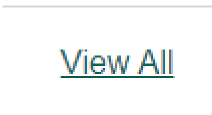
4. Next, check the email account associated with your username for instructions on resetting your password. Remember to look in your spam folder, where automated messages sometimes filter. If you still can't log in, contact GrantAdmin@kcrha.org for assistance.

User Management

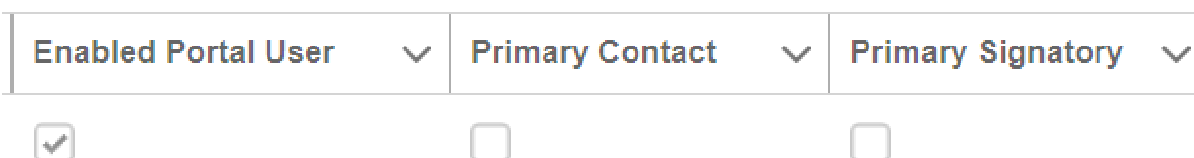
This section outlines how to manage the users associated with your account in the grants management system.

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:

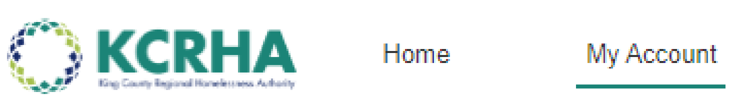


3. You will be navigated to a new page with a list of all the contacts associated with your account. Below is some guidance on what is tracked on these contact records:
    a. If a user has “Portal User Enabled” set to true, they will be able to log into the portal.
    b. If a user has “Primary Contact”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

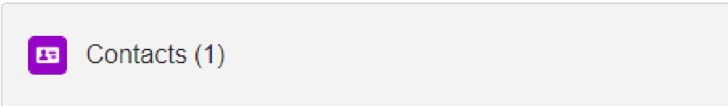


Adding a New User

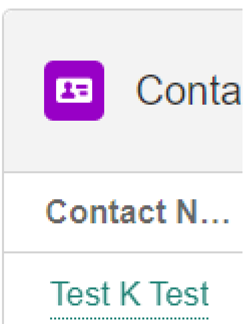
1. Navigate to “My Account” near the top of the page.



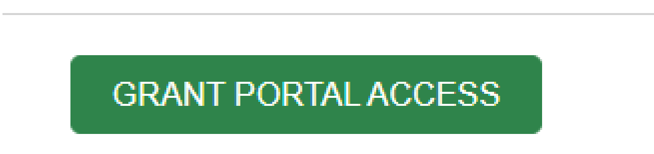
2. Click on “New Contact” on the right-hand side of the screen, above the “Contacts” section.



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.

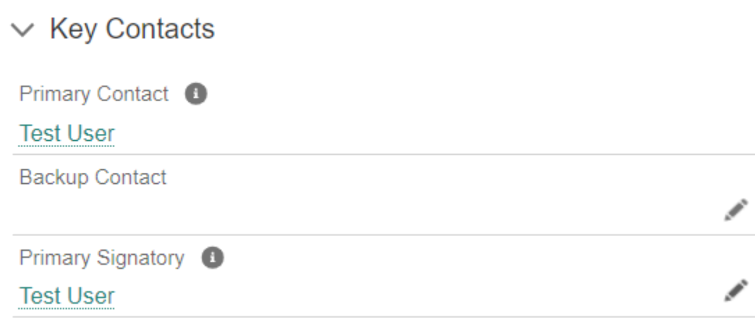


7. When prompted, select "Activate User." This will enable the contact to log into your account.

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.



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.

Updating the Primary Contact

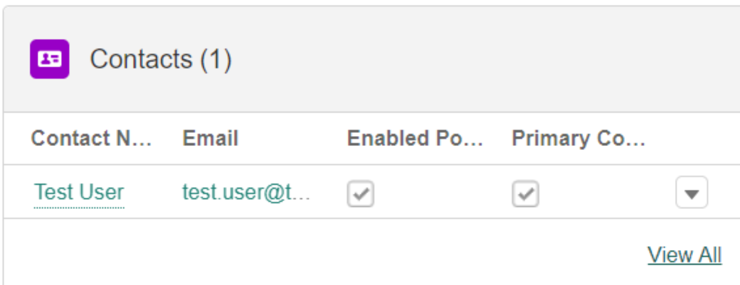
The Primary Contact of your account is the person with permission to manage your account, see all applications and contracts associated with your account, create new users, and deactivate existing users associated with your account.

If you ever need to change the Primary Contact associated with your account, please reach out to grantadmin@kcrha.org for assistance.

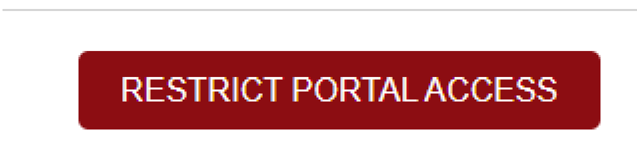
Deactivating a User

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.



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

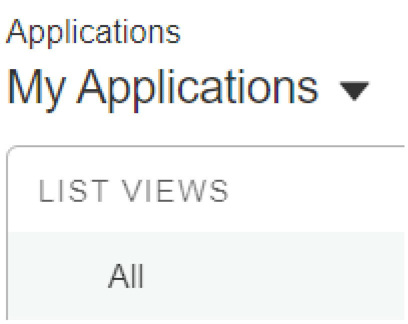


Application Management

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

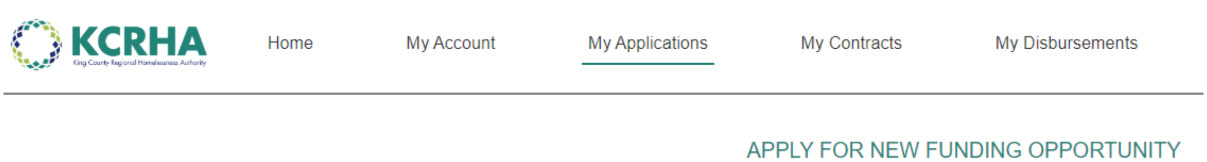
Viewing Existing Applications

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.”

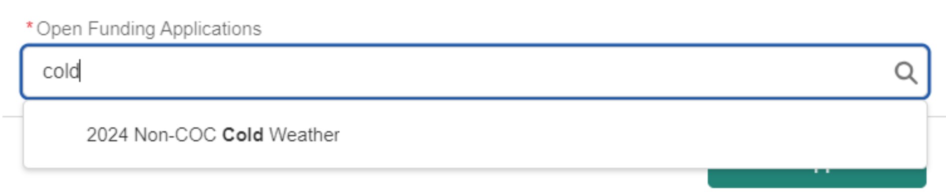


Creating an Application

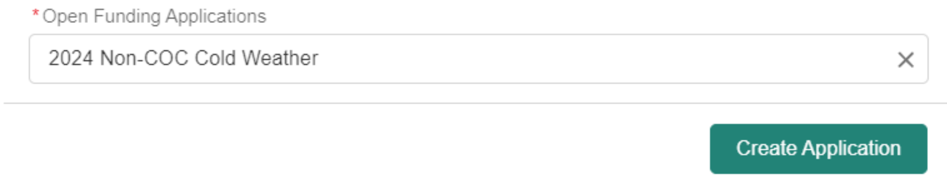
1. Navigate to “My Applications” and select “Apply for New Funding Opportunity.”



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.

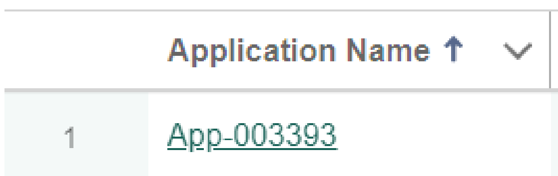


4. The page will refresh and navigate you to the Application you just created.

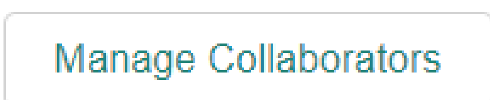
Managing Application Collaborators

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:

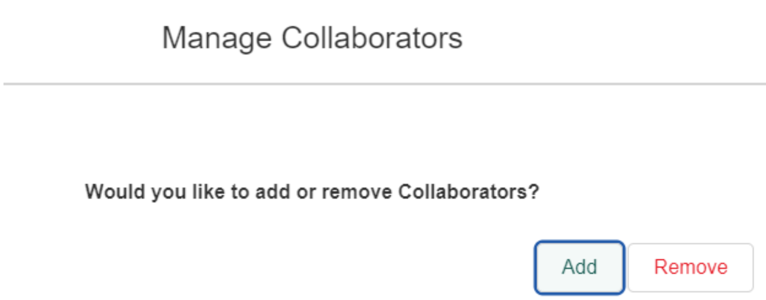
1. On the “My Applications” page, click into the relevant application by clicking on the link in the Application Name column.



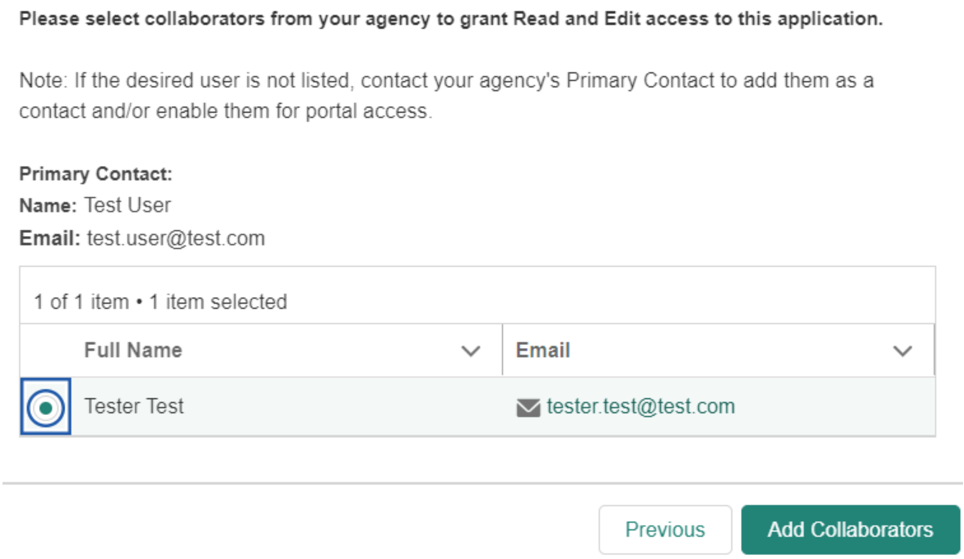
2. Select the “Manage Collaborators” button on the right-side of the screen.



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



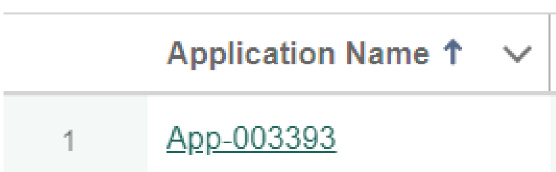
4. A list of contacts associated with your account will appear like the one below. Click on the radial icon beside the name of the contact you wish to add to the application and select “Add Collaborators.”



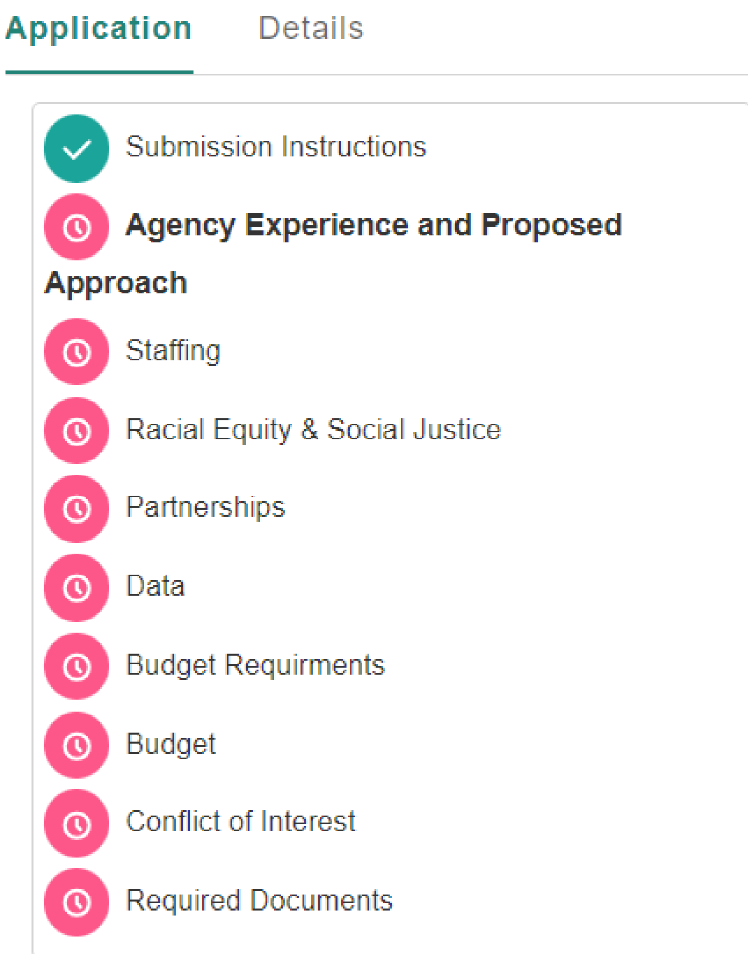
   a. If you receive a “No Contacts Found” message, confirm that you have other contacts associated with your account . Reach out to the primary contact of your agency for adding new contact. If you are the primary contact, follow the steps in the Adding a New User section. If there are still problems, 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.



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



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.

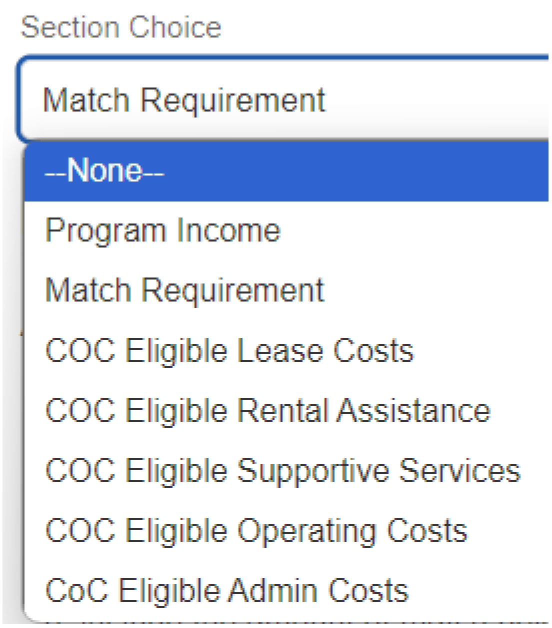
4. To upload documentation, click the “Upload Files” button. File explorer will appear, allowing you to search for and upload the requested document. If you have already uploaded the relevant documents in previous application, the record would have been saved in the system, and you don’t need to upload it again.

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

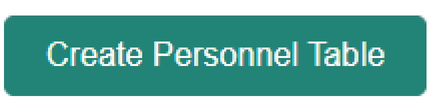
This section provides guidance on filling out the Budget section when completing an application.

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



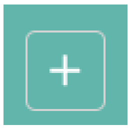
2. Navigate to the “Budget” section of the application.

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



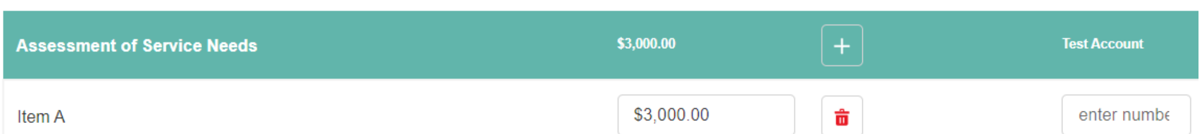
4. Enter in requested amounts for each line item by editing the boxes below each section:

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



6. 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.

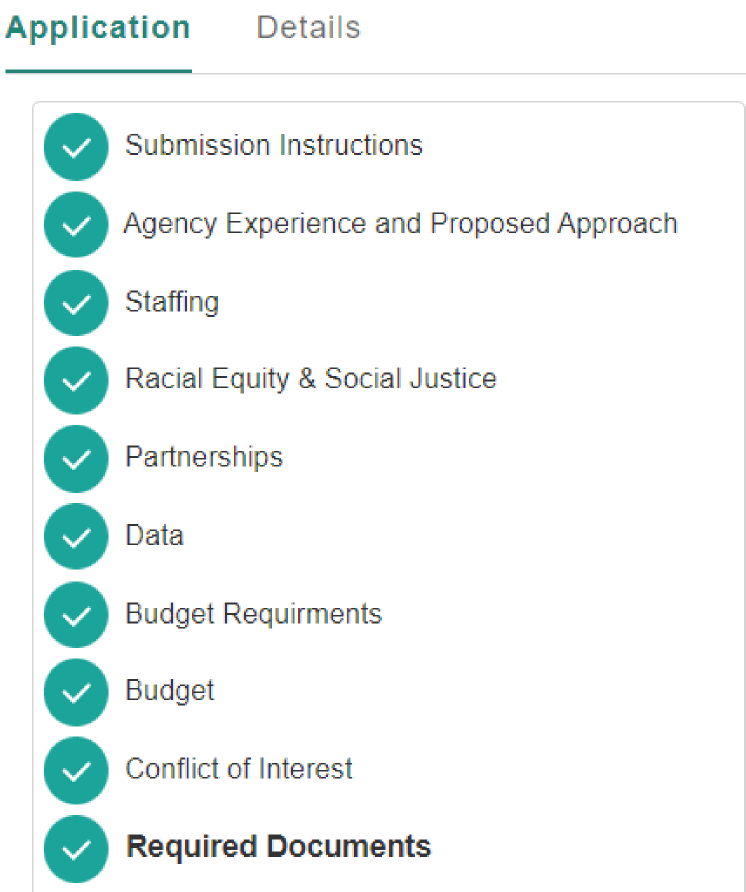
7. A field will appear, prompting you to enter the name of the entity matching the funds. Enter the name and select “Next.”
8. The page will reload. Upon scrolling back to the budget table, you should now see a column with the name of your funding match. For any applicable line item, enter in the match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



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

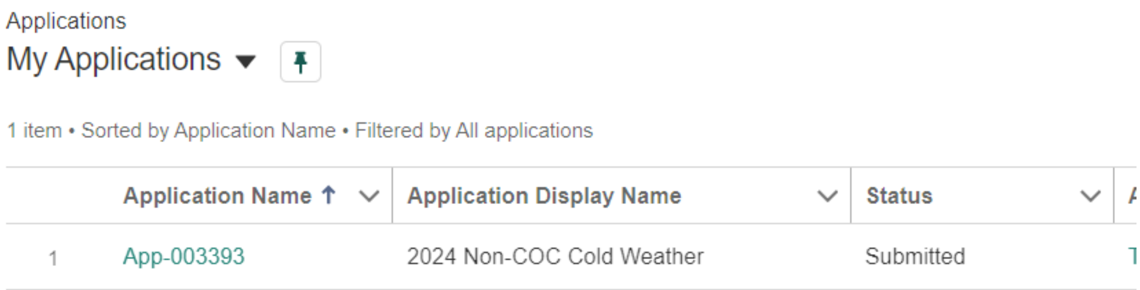
Submitting an Application

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.



Checking an Application's Status

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



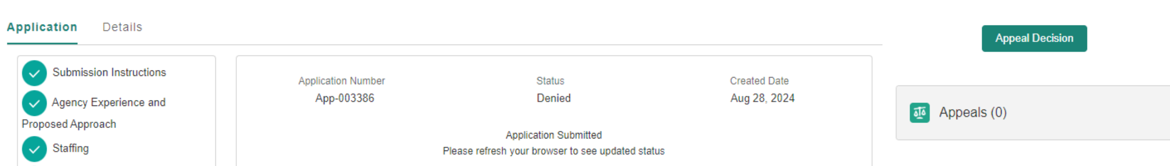
Here's a list of all the potential statuses:

'New': You have created an application in the system but haven't filled out any information in application page.
'In Progress": You have started filling out application information but haven't submitted your application.
'Submitted': Your application has been successfully submitted.
'Returned for More Information': Your application has been returned by KCRHA for more information.
'Awarded': Your application has been selected for funding, and you'll receive an email notification.
'Denied': Your application was not selected this time. If applicable, you may be eligible to appeal.
'Appeal': You have appealed for a denied application.

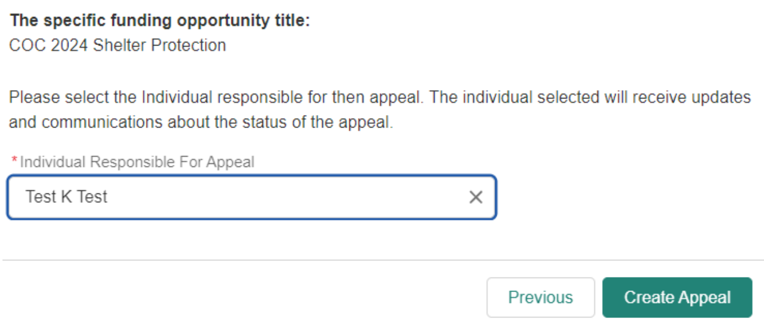
Application Denial and Appeal Process

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:

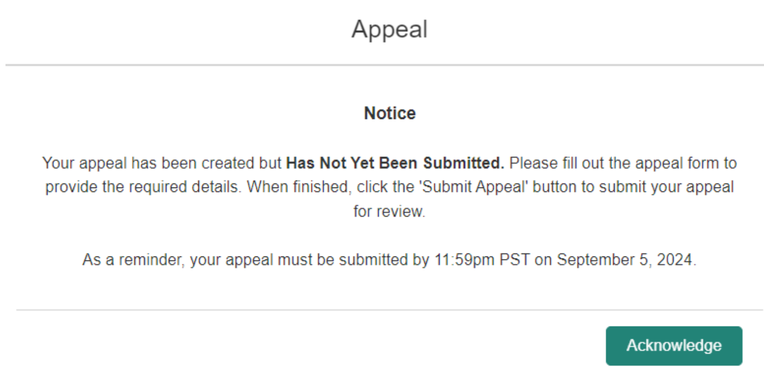
1. Navigate to the relevant application.
2. Click on the "Appeal Decision" button now available on the right-side of the screen.



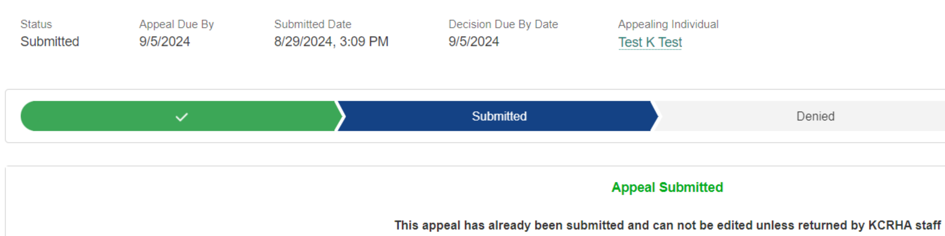
3. A message will display, providing further guidance on the appeal process. You will be able to proceed after selecting "Continue."
4. Next, you will be prompted to confirm the Individual responsible for the appeal. Contacts can be selected if they are associated with the agency.



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



6. 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.

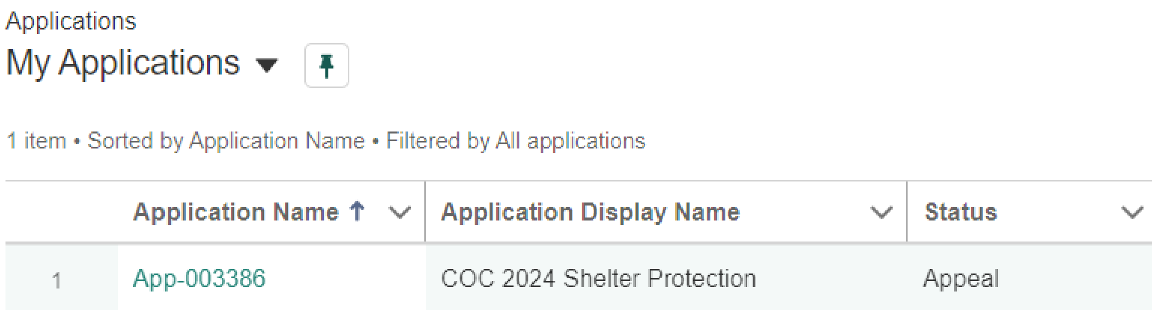


7. You will receive an email alert, confirming that KCRHA has received your appeal.

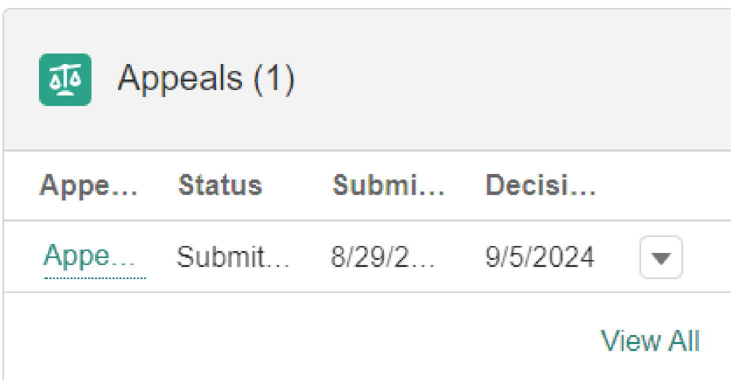
Checking an Appeal’s Status

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

1. Navigate to the My Applications tab near the top of the page.
2. Click on the application with a Status of “Appeal.”



3. 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.



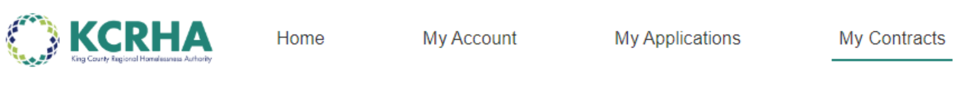
4. Click on the green text in the first column to navigate to the Appeal record to see a copy of the appeal form you submitted.

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.

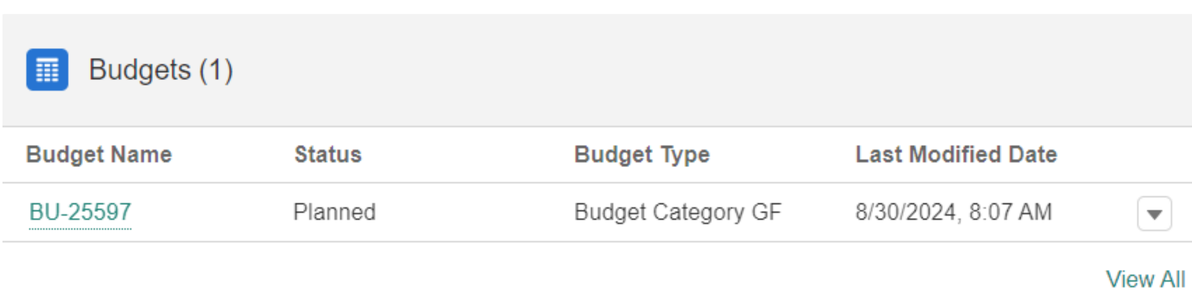


2. You will be navigated to a page that lists the Contracts associated with your account.
3. Click the down arrow beside "All Contracts" to see the Contracts organized in different ways.

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

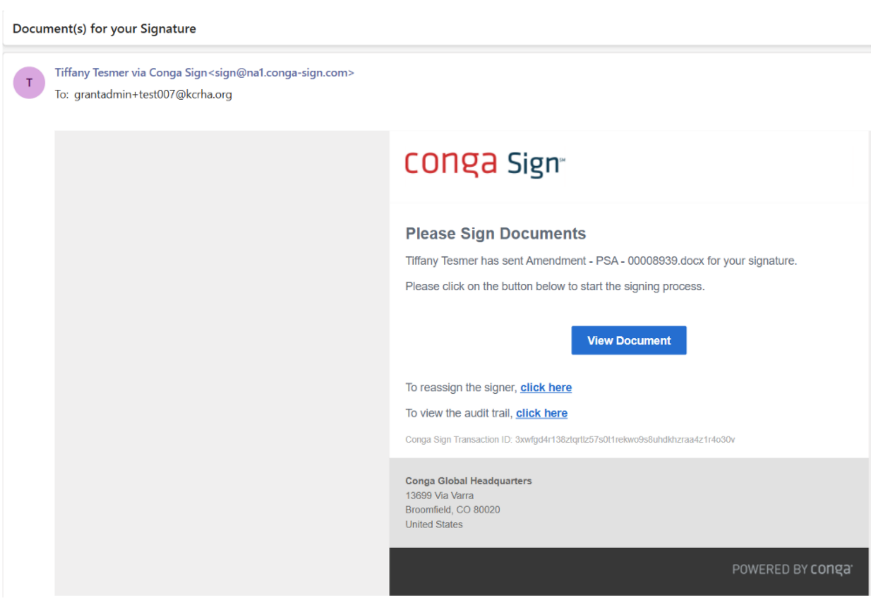
View All

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.

Signing a Contract

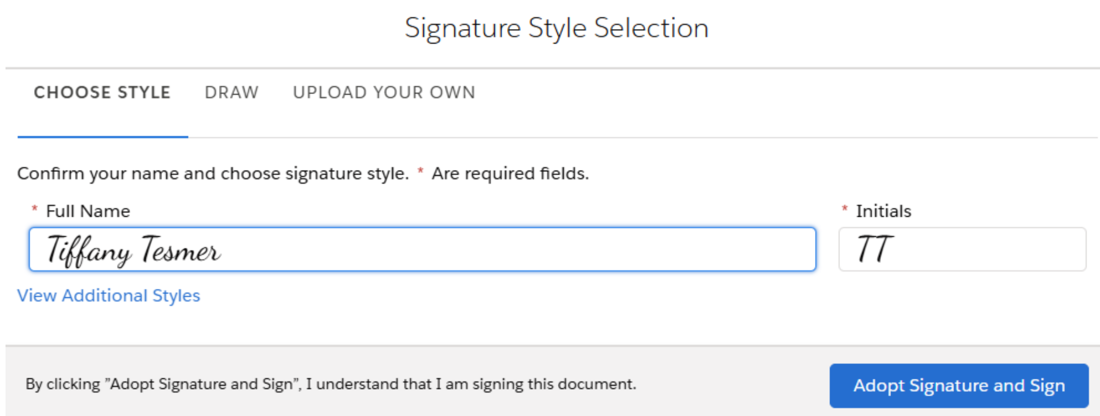
1. Once a contract has been reviewed and the budget finalized, it is ready to be signed. It will first be sent for review and signature to the Signatory on your account.
    a. Instructions to view or modify your account's signatory are available in the Updating the Primary Signatory section. Please confirm that the Primary Signatory's email is accurate.
    b. Our contracts are sent for signature through Conga Sign. When a contract is sent for signature through Conga Sign, the recipient will receive an email like the one below. Click the View Document button on the email to navigate to the contract.



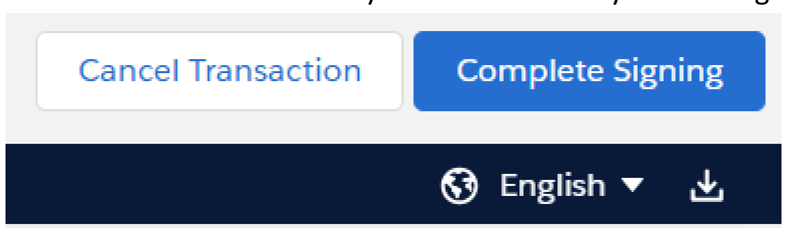
    c. When you first navigate to the contract, it will be greyed out until you click the "I Agree" button at the bottom of the screen.

    d. Please review the contract and verify that you have no concerns or questions. If you do, please reach out to your primary point of contact at KCRHA. Otherwise, scroll to the bottom of the contract and find the Signature box. Click on it to customize your signature style and sign the document.

e. After customizing your signature, click the Adopt Signature and Sign button to sign the contract.



f. Once you are done, click the Complete Signing button in the upper-right corner of the screen. This will notify KCRHA staff that you have signed the document.



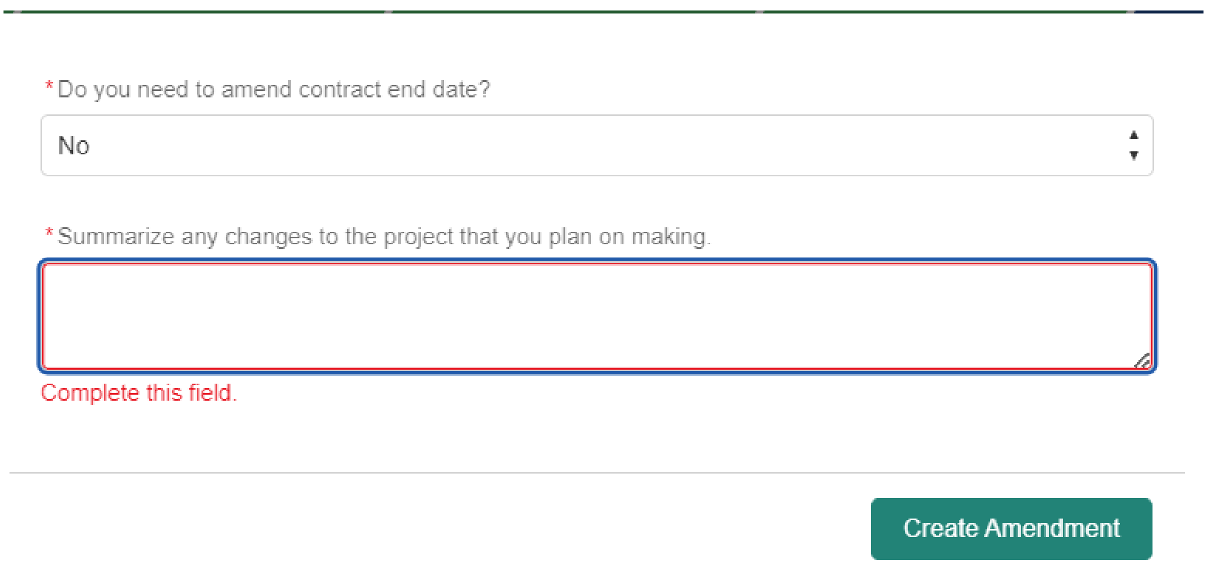
2. Once your primary signatory has signed, the contract will be sent to KCRHA's signatory for review and signature.
3. Once all parties have signed, the Contract status will update to Activated in the Grants Management Portal.

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.

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."

4. 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.



5. When you're finished, select "Create Amendment."
6. 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.

7. 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.

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

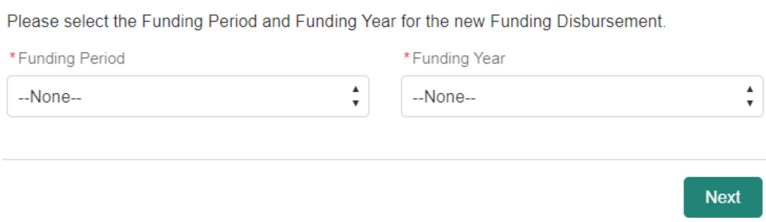
Disbursements can have the following statuses:

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.

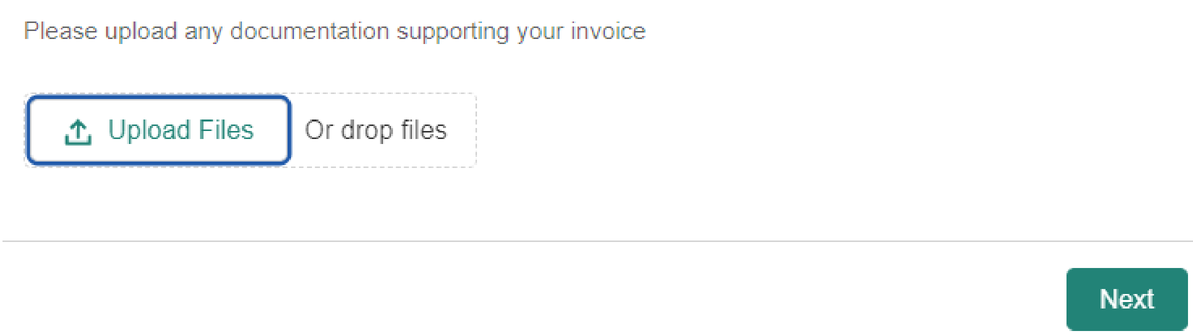
Creating a Reimbursement

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.

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."



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.



    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