



Financial Module

Version 2.0



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Introduction

The Financial tab contains the following sections:

- **Leveraged Funds** – maintains information relating to the organizations participating in Leveraged Funds.
- **In Kind** – maintains maintain details on in-kind contributions.

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California Partnership to End Domestic Violence

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Leveraged Funds | In Kind

2013-2014 Financial

Year: 2013-2014

Leveraged Funds [add](#)

Source of Funds	Organization Type	Funds
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No information entered.

Leveraged Funds

Leveraged Funds are new grants or other funding that is provided by the program or a partner specifically for CCC activities and that is not from the Centers for Disease Control and Prevention, Division of Cancer Prevention and Control. This is a separate calculation than that requested for cost-sharing requirements. CDC funds other than DCPC funds that are obtained by partners to conduct CCC activities should be included.

An important outcome for Comprehensive Cancer Control (CCC) is an increase in funding to enhance the quality or reach of cancer-control services provided. Funding is also the key to the sustainability of the partnership and its capacity to do its work.

Use the *Leveraged Funds* page to add and maintain information regarding organizations that participate in Leveraged Funds and their contribution. After adding the information, the page lists each source, and allows you to view, edit, or delete Leveraged Funds sources.

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Leveraged Funds | In Kind

2013-2014 Financial Year: 2013-2014 Go

Click to edit leveraged funds

Leveraged Funds add

Source of Funds	Organization Type	Funds	
California Partnership to End Domestic Violence	Coalition/Alliance	\$120,000	view edit delete
Total Leveraged Funds		\$120,000	

Click to add leveraged funds

Click to delete leveraged funds

Adding Leveraged Funds information

1. Click the **add** link on the *Leverage Funds* page.

Result: The system displays the *Add Leverage Funds* section in the right display pane.

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 My Reports

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Leveraged Funds | In Kind

2013-2014 Financial

Add Leveraged Funds

*Source of Funds:

*Organization Type:

*Amount of Funds: \$

*Description:

ABC

Characters: 0 / Maximum: 1500

2. In the *Source of Funds* field, select the source of the leveraged funds from the drop-down list. If the desired source of funds is not included in the drop-down list, select *Other*, and enter the source of funds in the *Other* text box. Maximum text for the *Other* field is 100 characters, about 20 words.
3. In the *Organization Type* field, select the organization type associated with the source from the drop-down list. If the desired organization type is not included in the drop-down list, select *Other*, and enter the organization type in the *Other* text box. Maximum text for the *Other* field is 50 characters, about 10 words.
4. In the *Amount of Funds* field, enter the amount of the leveraged funds. Do not include decimal points. Maximum number for this field is 12 digits. The amount entered in this field must be higher than zero (0).
5. In the *Description* field, enter a description for the leveraged funds item. Maximum number for this field is 1500 characters, about 300 words.



Note

- You can use the spell checker to check your entry. The character count also allows you to keep track of how much data you have entered and how many characters you have left

6. Click **Save** to save the leveraged funds information.

Result: The system saves the information and returns you to the *Leveraged Funds* list page, where it

displays the newly added information.

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Leveraged Funds | In Kind

2013-2014 Financial Year: 2013-2014

Leveraged Funds [add](#)

Source of Funds	Organization Type	Funds	
California Partnership to End Domestic Violence	Coalition/Alliance	\$120,000	view edit delete
Total Leveraged Funds		\$120,000	

[Click to add leveraged funds](#)

What do I do differently for my FOA when entering Leveraged Funds information?

Click on your FOA to find out.

[REACH](#) |

Adding Leveraged Funds information: REACH FOA

1. In the *Source of Funds* field, select Organization from the drop down list.
Result: The system displays the Organization Name field.
2. In the *Organization Name* field, enter the organization name associated with the leveraged funds.
Maximum text for the *Organization Name* field is 200 characters, about 40 words.

Editing Leveraged Funds information

1. On the *Leveraged Funds* list page, click the **edit** link on the same row as the source that you want to edit.
Result: The system displays the *Edit Evaluation* page.



Note

- The page for entering initial information and modifying existing leveraged funds information s are identical. The only difference is that the *Edit* page displays the existing evaluation information while the fields in the page for entering initial information are blank.

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Leveraged Funds | In Kind

2013-2014 Financial

Edit Leveraged Funds

La

*Source of Funds:

*Organization Type:

*Amount of Funds:

*Description:

ABC

This is a coalition to end occurrences of domestic violence in California.

Characters: 72 / Maximum: 1500

2. Modify the fields as necessary.
3. Click the **Save** button to save the information. The system saves the information and returns you to the *Leveraged Funds* list page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.

Deleting a Leveraged Funds source

1. On the *Leveraged Funds* list page, click the **delete** link on the same row as the source you want to delete.
Result: The system displays a message asking you to confirm the deletion.

2013-2014 Financial

Delete Leveraged Funds



Are you sure you want to delete **California Partnership to End Domestic Violence** as a Leveraged Funds?

2. Click **Yes** to confirm the deletion.

Result: The system deletes the attachment and returns you to the *Leveraged Funds list* page.



Note

- Once a source of leveraged funds is deleted, it is no longer available in the system.

In Kind Contributions

In-kind resources are the sum of all contributions of labor, supplies, or other items that have a measurable value by formal partners and all other organizations and individuals. Funding provided by a partner should be included as leveraged funds. This is a separate calculation from that requested for cost-sharing requirements.

Use the *In kind Contributions* page to add and maintain information for contributions that were made in kind to the program.



- Funding provided by a partner should be included as leveraged funds. This is a separate calculation from the one requested for cost-sharing requirements.

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California Partnership to End Domestic Violence

The screenshot shows a web interface with a top navigation bar containing tabs: System Admin, FOAs & Recipients, Program Information, Resources, Financial, Planning, Action Plan, Community Information, Reports, and Search. Below the tabs is a breadcrumb trail: Leveraged Funds | In Kind. The main content area is titled '2013-2014 Financial' and includes a 'Year:' dropdown menu set to '2013-2014' with a 'Go' button. Below this, there is a link for 'In Kind Contributions add' and a link for 'View In-Kind Contributions'. A yellow callout box with a black border points to the 'add' link, containing the text 'Click to add In-kind contributions'. At the bottom of the section, it says 'No information entered.'

Adding In-kind Contribution information

1. Click the **add** link on the *In kind Contributions* page.

Result: The system displays the *Add In-kind Contributions* section in the right display pane.

2013-2014 Financial

Add In-Kind Contributions

Summary of Contributions: Meeting/Conference Support

Media/Publishing

Personnel

Printing

Supplies

Travel

Other(specify)

Other(specify)

Other(specify)

Total Contributions: \$0

Attach Additional Details: File size cannot exceed 10MB

Attached:

Note: Attaching a second file will overwrite the existing file.

2. In the *Summary of Contributions: Meeting/Conference Support* field, enter the amount of the In-kind funds for each contribution type as necessary. If the desired In-kind contribution type is not included in the list, enter a desired type in an *Other (specify)* text box and enter an amount for the *Other* In-kind type in the text box next to the In-kind type. Maximum text for the *Other* field is 50 characters, about 10 words. Maximum number for the amount is 12 digits. You can enter up to three *Other* In-Kind types.
3. In the *Attach Additional Details* field, click *Browse* to navigate to the location where the document you want to upload as an attachment is saved and select the document.



Note

- You can attach only one document to the In-kind Contributions section. However, you can attach documents multiple times. The system overwrites the previously attached document each time you attach a new one. Attached documents cannot exceed 10MB in size.

4. Click **Save** to save the In-kind contributions information.

Result: The system saves the information and returns you to the *In-kind Contribution* page, where it displays the newly added information.

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California Partnership to End Domestic Violence

- System Admin
- FOAs & Recipients
- Program Information
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- Search

Leveraged Funds | In Kind

2013-2014 Financial

Year: 2013-2014

[In Kind Contributions edit](#)

Click to edit In-kind contributions

View In-Kind Contributions

Summary of Contributions:	Meeting/Conference Support	\$5,000
	Media/Publishing	\$200,000
	Personnel	\$10,000
	Printing	\$3,000
	Supplies	\$5,000
	Travel	\$3,000
	Total Contributions:	\$226,000

Attach Additional Details: [In-kind.doc](#)

Editing In-kind Contributions information

1. On the *In-Kind Contributions* page, click the **edit** link.

Result: The system displays the *Edit In-kind Contributions* page.

Edit In-Kind Contributions

Summary of Contributions:	Meeting/Conference Support	<input type="text" value="5000"/>
	Media/Publishing	<input type="text" value="200000"/>
	Personnel	<input type="text" value="10000"/>
	Printing	<input type="text" value="3000"/>
	Supplies	<input type="text" value="5000"/>
	Travel	<input type="text" value="3000"/>
	Other(specify)	<input type="text" value="0"/>
	Other(specify)	<input type="text" value="0"/>
	Other(specify)	<input type="text" value="0"/>
	Total Contributions:	\$226,000

Attach Additional Details:

File size cannot exceed 10MB

Attached: [In-kind.doc](#)

Note: Attaching a second file will overwrite the existing file.

**Note**

- The page for entering initial information and modifying existing leveraged funds information s are identical. The only difference is that the Edit page displays the existing evaluation information while the fields in the page for entering initial information are blank.
-

2. Modify the fields as necessary.
3. Click the **Save** button to save the information. The system saves the information and returns you to the *In-kind Contributions* page. If any fields on the page are incomplete or invalid when you click **Save**, the system displays an error. Correct all invalid fields and click **Save** again.