

Creating Material Grants

Roles that Have Access: Agency Admin, Home Visit Manager, Home Visit Supervisor, Home Visitor, Home Visit Admin

This instruction sheet will demonstrate how to create material grants for families, as well as how to add material goods to those grants.

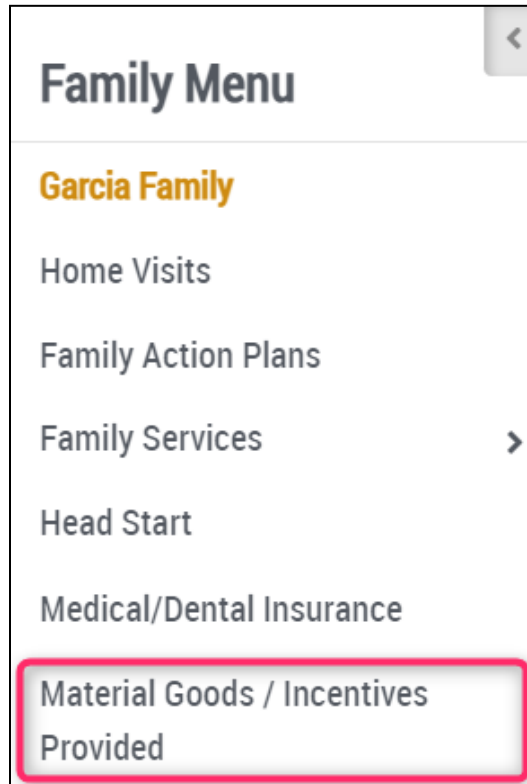
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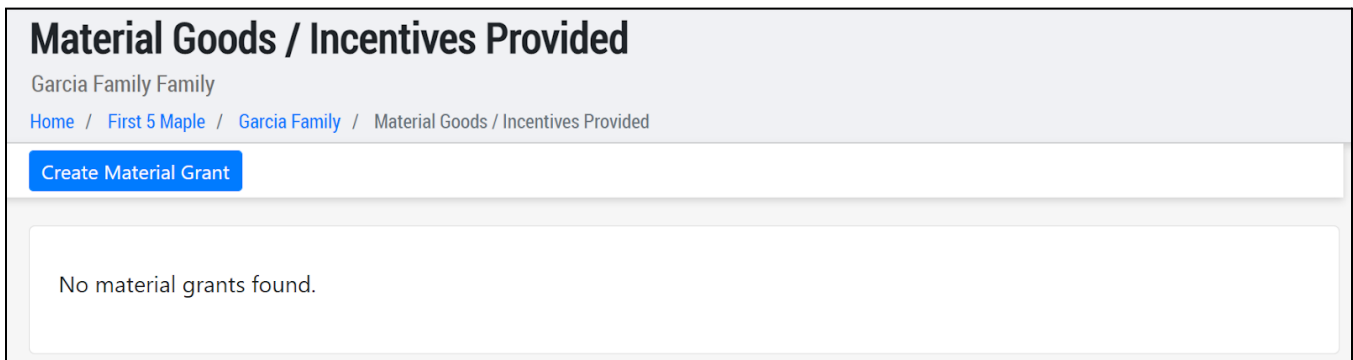
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Navigating to Material Goods / Incentives Provided

From the **Family Menu**, select the “Material Goods / Incentives Provided” menu item.

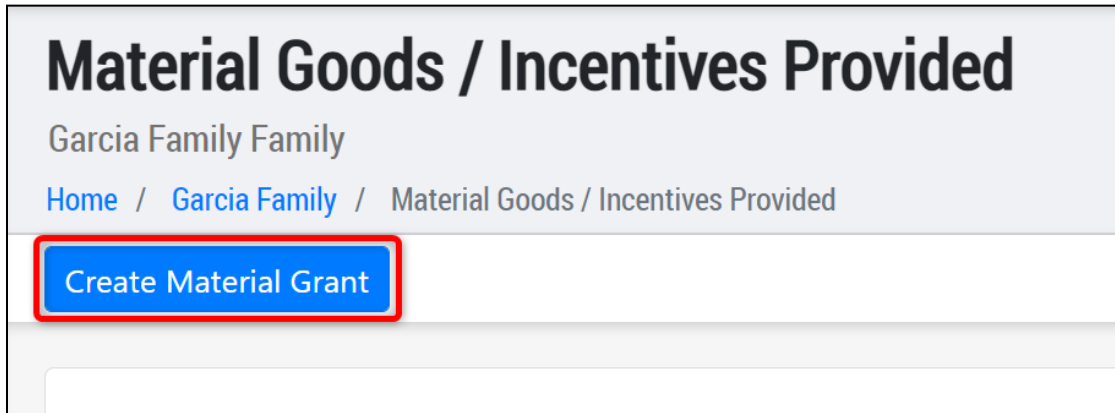


2 This will take you to the **Material Goods / Incentives Provided** record.

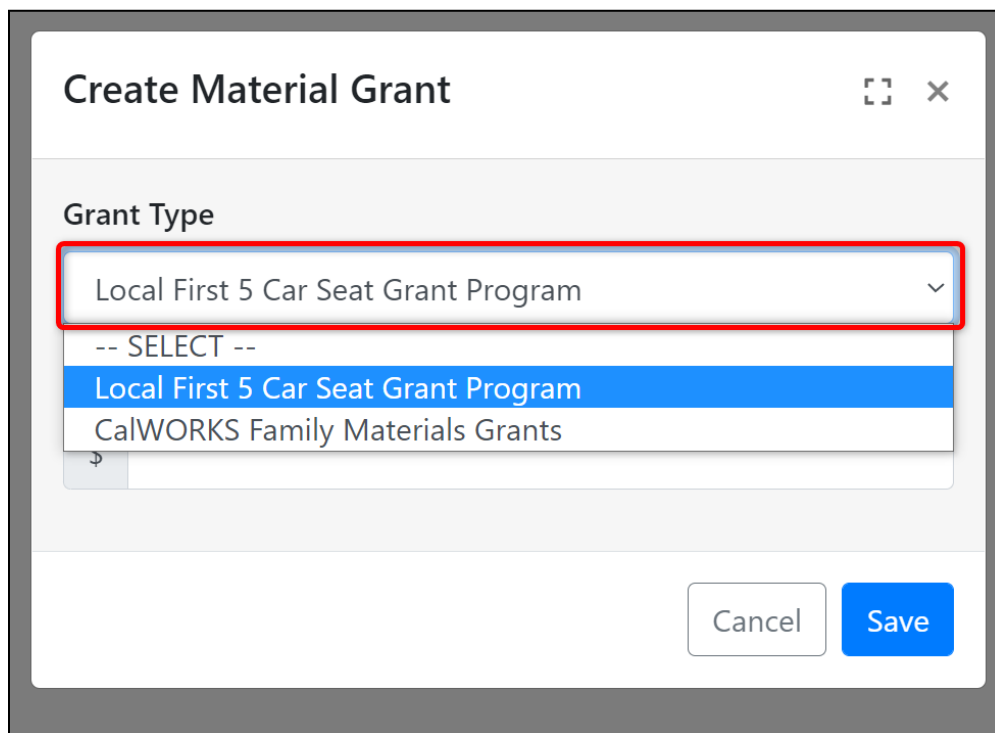


Creating a Material Grant

To begin, click on the blue “Create Material Grant” button.



- 2 In the “Create Material Grant” modal that opens, select the “Grant Type” from the agency’s customized grant list.



3

Then enter the “Budget Allotment” amount. Once done, click the blue “Save” button.

Create Material Grant

Grant Type
Local First 5 Car Seat Grant Program

Budget Allotment
\$ 150

Cancel Save

After you have saved a material grant, it will appear in the “Active Material Grants” tab of this record.

Material Goods / Incentives Provided




Garcia Family Family

Home / First 5 Maple / Garcia Family / Material Goods / Incentives Provided

Create Material Grant

Active Material Grants Archived Material Grants

Search: Show 25 entries

Grant Name	Source	Budget Allotment	Total Estimated Allocations	Total Actual Allocations	Action
Local First 5 Car Seat Grant Program	Agency	\$150.00	\$0.00	\$0.00	  

Showing 1 to 1 of 1 entries Previous 1 Next

4

On the far right side of the grid, you can click on the pen icon to update the selected “Grant Type” and/or the “Budget Allotment.”

Update Material Grant

Grant Type
Local First 5 Car Seat Grant Program

Budget Allotment
\$ 150.00

Cancel Save

5

You can archive the grant by clicking on the box icon (also located on the far right side of the grid). Clicking this box icon will open an “Archive / Un-Archive Material Grant” modal, where you will be asked to confirm this action. Once confirmed, this will move the grant into the “Archived Material Grants” tab on this record.

More on archived material grants in a section below.

The screenshot shows a table with columns: Grant Name, Source, Budget Allotment, Total Estimated Allocations, Total Actual Allocations, and Action. The first row is 'Local First 5 Car Seat Grant Program' with Source 'Agency', Budget Allotment '\$150.00', Total Estimated Allocations '\$0.00', and Total Actual Allocations '\$0.00'. A red box highlights the 'Action' column for this row, which contains a pencil icon, a box icon, and a trash can icon. A red arrow points from the box icon to a modal window titled 'Archive / Un-Archive Material Grant'. The modal contains the text: 'Are you sure you want to archive the material grant Local First 5 Car Seat Grant Program?' and two buttons: 'Cancel' and 'Save'.

6

You can also delete the material grant by clicking on the red trash can icon located on the right side of the grid. Clicking this box icon will open a “Delete Material Grant” modal, where you will be asked to confirm this action. Once confirmed, the grant will be deleted from the family’s record.

The screenshot shows the same table as above. A red box highlights the trash can icon in the 'Action' column for the 'Local First 5 Car Seat Grant Program' row. A red arrow points from the trash can icon to a modal window titled 'Delete Material Grant'. The modal contains the text: 'Are you sure you want to delete the material grant Local First 5 Car Seat Grant Program? Deleting this grant will also delete all associated material goods.' and two buttons: 'Cancel' and 'Delete'.

Adding Material Goods

To add material goods to a material grant, click on the blue “Grant Name” in the “Active Material Grants” tab.

The screenshot shows the 'Active Material Grants' tab. At the top, there are two tabs: 'Active Material Grants' (selected) and 'Archived Material Grants'. Below the tabs is a search bar and a 'Show 25 entries' dropdown. A table lists the grants with columns: Grant Name, Source, Budget Allotment, and Total Estimated. The first entry is 'Local First 5 Car Seat Grant Program' with Source 'Agency', Budget Allotment '\$150.00', and Total Estimated '\$0.00'. The 'Grant Name' is highlighted with a red box. Below the table, it says 'Showing 1 to 1 of 1 entries' with 'Previous' and 'Next' buttons, and a page number '1' in a box.

2

This will take you to the **Material Grant** record. Click on the blue “+Add Material Good” button.

The screenshot shows the 'Local First 5 Car Seat Grant Program' record page. At the top, there is a breadcrumb trail: 'Home / First 5 Maple / Garcia Family / Local First 5 Car Seat Grant Program'. Below the breadcrumb are navigation buttons: 'Back', 'Download Material Grant', 'Edit', 'Archive', and 'Delete'. The main content area displays key information in a grid:

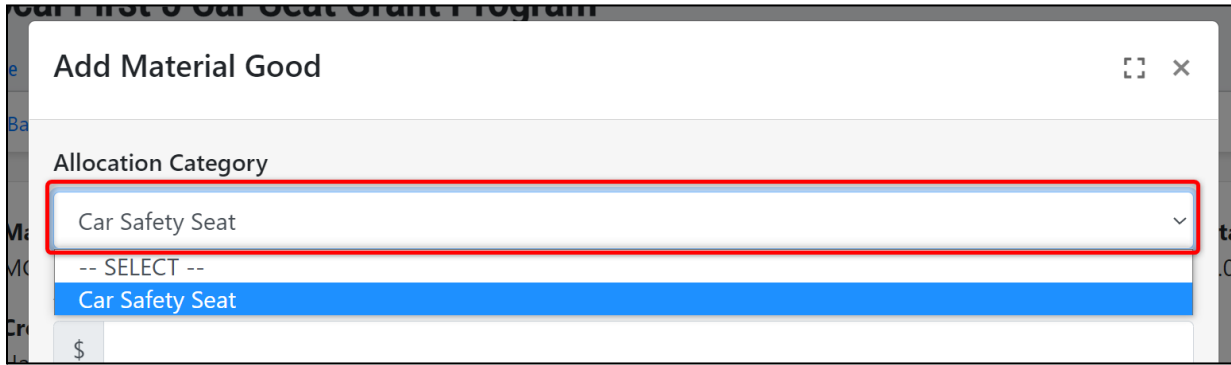
Material Grant ID MG12255042	Budget Allotment \$150.00	Total Estimated Allocations \$0.00	Total Actual Allocations \$0.00
Created By HannahValentine on 6/8/2022	Updated By AmandaWright on 6/8/2022		

Below this is a section for 'Material Goods' with a blue '+ Add Material Good' button highlighted by a red box and a red arrow pointing to it. At the bottom, there is a table header for the material goods table:

Allocation Category	Notes	Allocation Cost Estimate	Estimated Date Of Purchase	Allocation Cost Actual	Actual Date of Purchase	Materials	Materials Delivered By	Materials Delivered On	Created By	Updated By	Actions
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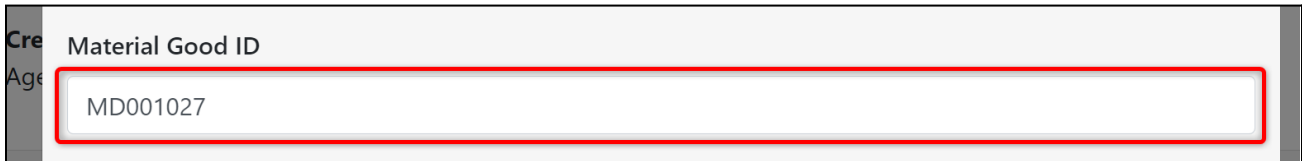
3

In the “Add Material Good” modal that opens, select an “Allocation Category.” Please note that this is a required field.



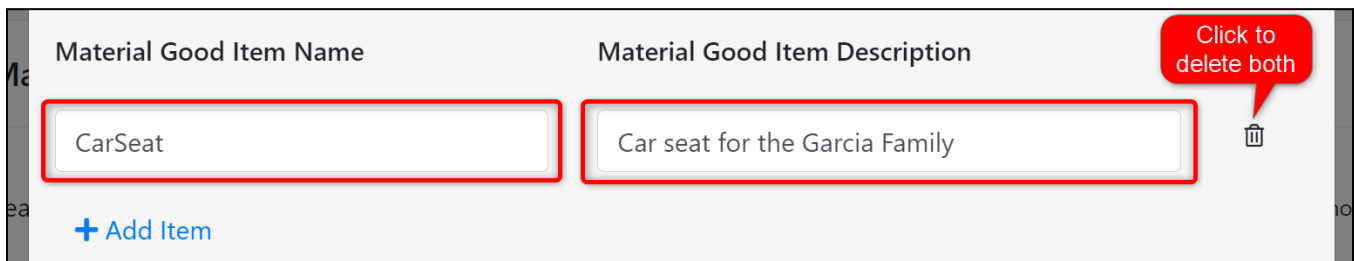
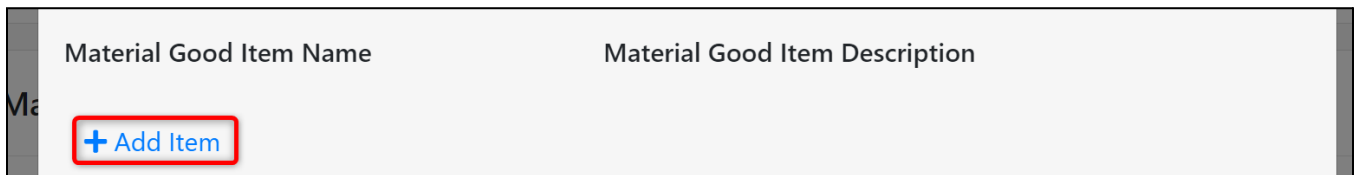
4

Beneath this field is the “Material Good ID” field. This field can be edited but it is recommended to keep the auto generated number so as to ensure unique IDs are saved in the system.



5

To specify the material good(s) purchased, you can add a “Material Good Item Name” and “Material Good Item Description.” To do so, click on the blue “+Add Item” button (add as many as desired by clicking on this button repeatedly). In the fields that open add the details you wish to record for the material good. Please note that you must have a “Material Good Item Name” if a description is provided.



6

Next add an “Allocation Cost Estimate” amount and an “Estimated Date of Purchase” by typing in the date or choosing from the calendar icon’s calendar view tool.

This screenshot shows two input fields. The first field, labeled "Allocation Cost Estimate", contains the value "\$ 200" and is highlighted with a red border. The second field, labeled "Estimated Date of Purchase", contains the date "07/12/2023" and includes a calendar icon on the right, also highlighted with a red border.

7

Enter the “Allocation Cost Actual” once the purchase has been made. This is the final cost once purchased. Then add an “Actual Date of Purchase” by typing in the date or choosing from the calendar icon’s calendar view tool.

This screenshot shows two input fields. The first field, labeled "Allocation Cost Actual", contains the value "\$ 175" and has a small up/down arrow on the right, highlighted with a red border. The second field, labeled "Actual Date of Purchase", contains the date "07/12/2023" and includes a calendar icon on the right, also highlighted with a red border.

8

In the “Materials Delivered By” dropdown, select which staff member delivered the goods.

This screenshot shows a dropdown menu titled "Materials Delivered By". The menu is open, showing a search bar with the text "Search in this menu...". Below the search bar, there is a "--SELECT--" option and a list of names: Alex Cho, Hannah Valentine (highlighted in blue), Isabel Garcia, Sally Bauman, Daniel Lopez, and Emily Dodsen. The dropdown menu is outlined with a red border.

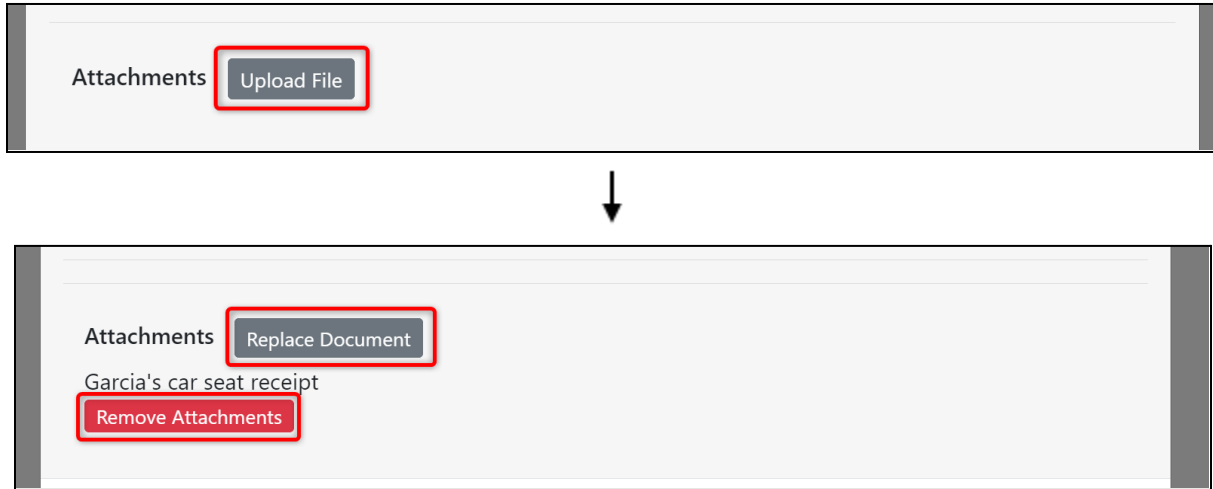
9

Add a “Materials Delivered On” date by typing in the date or choosing from the calendar icon’s calendar view tool.

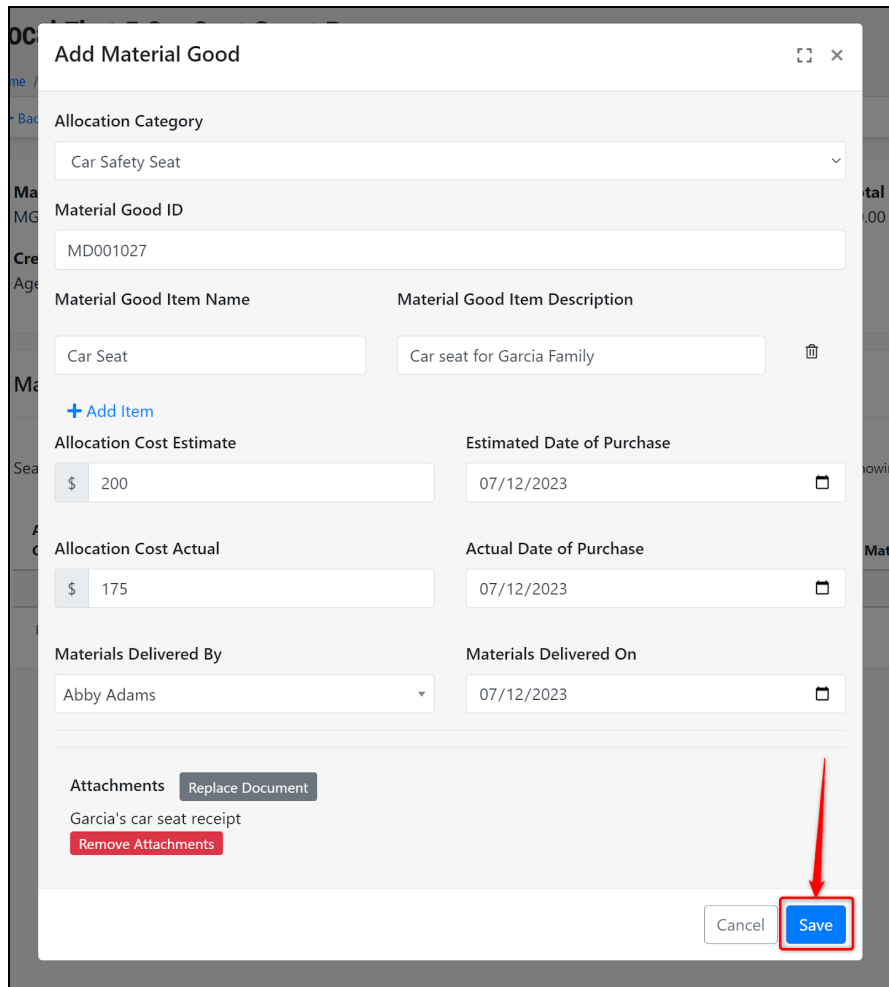
This screenshot shows two input fields. The first field, labeled "Materials Delivered By", is a dropdown menu with "Abby Adams" selected, highlighted with a red border. The second field, labeled "Materials Delivered On", contains the date "07/12/2023" and includes a calendar icon on the right, also highlighted with a red border.

10

You can add attachments by clicking on the gray “Upload File” button at the bottom of the modal. In the folder modal that opens, select a file from your computer. Once added, you can opt to remove or replace the attachment. This attachment will be saved in the “Attachments” column.



Once done adding information to the material goods modal, click on the blue “Save” button. The material goods will appear within the material grant.



Local First 5 Car Seat Grant Program

Home / First 5 Maple / Garcia Family / Local First 5 Car Seat Grant Program

[Back](#)
[Download Material Grant](#)
[Edit](#)
[Archive](#)
[Delete](#)

Material Grant ID MG17478808	Budget Allotment \$150.00	Total Estimated Allocations \$200.00	Total Actual Allocations \$175.00
Created By AgencyAdmin on 7/11/2023	Updated By AgencyAdmin on 7/11/2023		

Material Goods [+ Add Material Good](#)

Search: Show 25 entries [CSV](#) [Copy](#) [Column visibility](#) [Reset](#) Showing 1 to 1 of 1 entries

Allocation Category	ID	Status	Status Notes	Allocation Cost Estimate	Description of Material Good	Estimated Date Of Purchase	Allocation Cost Actual	Actual Date of Purchase	Materials	Materials Delivered By	Materials Delivered On	Created By	Updated By	Attachments	Actions
Car Safety Seat	MD001027	Draft	0	\$200.00	Car seat for Garcia Family	7/12/2023	\$175.00	7/12/2023	Car Seat	Abby Adams	7/12/2023	AgencyAdmin on 7/12/2023	AgencyAdmin on 7/12/2023	1	Edit Delete

Previous 1 Next

12 After adding a material good Item, you can change the status of the material good by clicking on the “Submit for Supervisor Approval” option in the dropdown. This will update the status accordingly.

Material Goods [+ Add Material Good](#)

Search: Show 25 entries [CSV](#) [Copy](#) [Column visibility](#) [Reset](#)

Allocation Category	ID	Status	Status Notes	Allocation Cost Estimate	Description of Material Good	Estimated Date Of Purchase	Allocation Cost Actual
Car Safety Seat	MD001027	Draft	0	\$200.00	Car seat for Garcia Family	7/12/2023	\$175.00

Previous 1 Next

[Submit for Supervisor Approval](#)

Archived Material Grants

You can find archived material grants within the “Archived Material Grants” tab.

Grant Name	Source	Budget Allotment	Total Estimated Allocations	Total Actual Allocations	Action
Little Dolphin Swimmers Grant	County	\$600.00	\$0.00	\$0.00	

2 To un-archive a material grant, click the “Grant Name.” This will take you to the **Material Grant** record.

Grant Name	Source	Budget Allotment
Little Dolphin Swimmers Grant	County	\$600.00

Click the blue “Un-Archive” button at the top of the record if you’d like to un-archive the material grant.

Little Dolphin Swimmers Grant

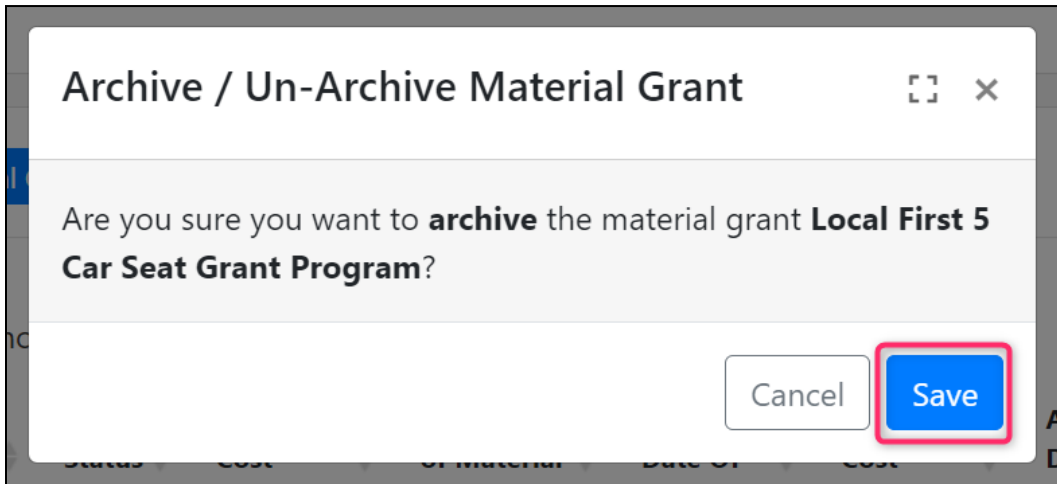
Archived

Home / Garcia Family / Little Dolphin Swimmers Grant

[← Back](#) [Download Material Grant](#) [Un-Archive](#) [Delete](#)

Material Grant ID	Budget Allotment
MG10149323	\$600.00

This will open an “Archive / Un-Archive Material Grant” modal. Click the blue “Save” button to finalize the change.



This will move the grant to the “Active Material Grants.”

Active Material Grants Archived Material Grants

Search: Show entries

Grant Name	Source	Budget Allotment
CalWORKS Family Materials Grants	County	\$450.00
Local First 5 Car Seat Grant Program	Agency	\$100.00