

Customizing Material Grants

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

Staff are able customize Material Grants at the agency level. This allows each agency to control Grants to be used for families material goods and incentives provided. This instruction sheet will review how to customize these Material Grants, among other actions as well.

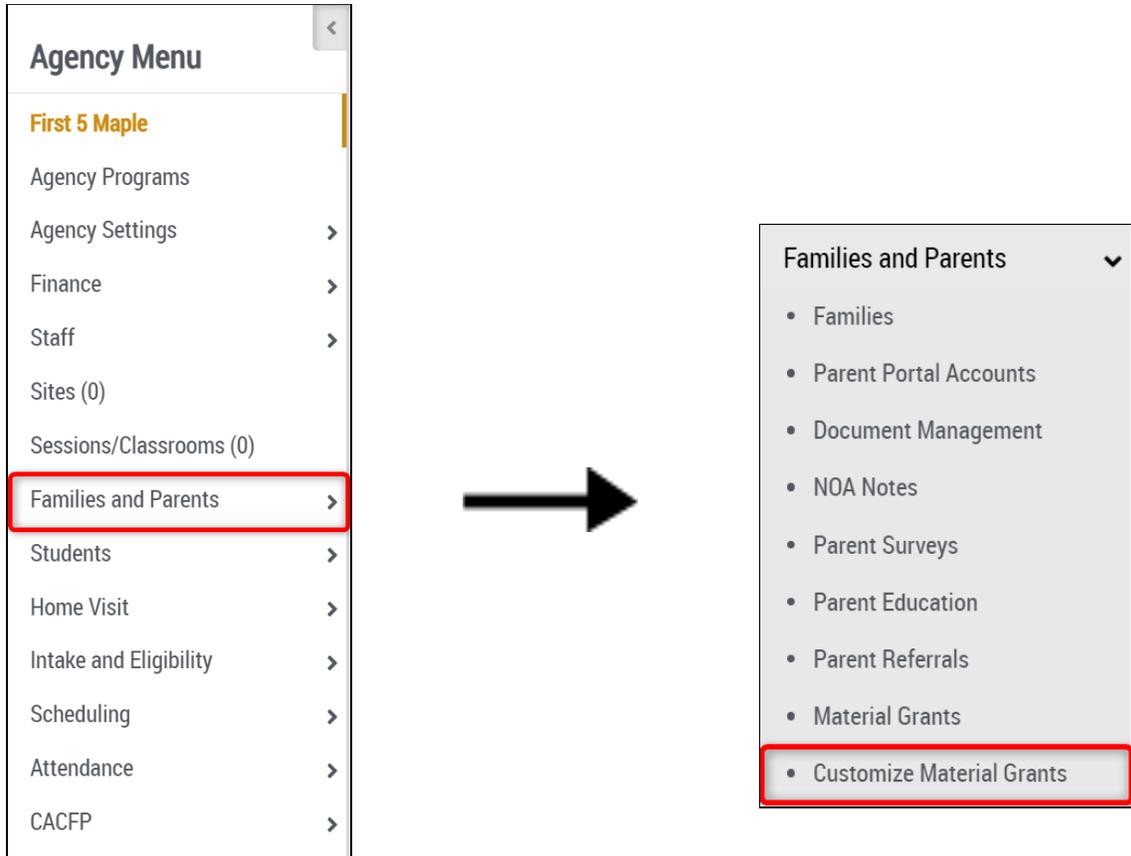
Table of Contents

Click on the topic or page number to jump to the corresponding section of the instruction sheet.

Navigating to Customize Material Grants.....	1
Customizing a Material Grant.....	2
Archived Material Grants.....	6

Navigating to Customize Material Grants

From the Agency Menu, select the “Families and Parents” menu item. From the submenu, then select the “Customize Material Grants” menu item.



2 You will land on the “Customize Material Grant” record. It has tabs for Active and Archived Grants.

Customize Material Grant

First 5 Maple

[Home](#) / [First 5 Maple](#) / [Customize Material Grants](#)

[Add Material Grant](#)

Active | Archived

Search: Show entries

Grant Name	Max Budget Allotment	Allocation Categories	Created By	Created On	Updated By	Updated On	Status	Actions
Local First 5 Car Seat Grant Program	\$400.00	Car Safety Seat	AmandaWright	6/7/2022	AmandaWright	6/7/2022	Active	

Showing 1 to 2 of 2 entries Previous Next

Customizing A Material Grant

To create a Material grant, start by clicking on the blue “Add Material grant” button.

Customize Material Grant

First 5 Maple

[Home](#) / [First 5 Maple](#) / [Customize Material Grants](#)

Add Material Grant

Active Archived

Search: Show entries

Grant Name ▲ **Max Budget Allotment** ◆ **Allocation Categories** ◆

2

In the “Create Grant Customization” modal that opens, enter a ‘Material Grant Name.’

Create Material Grant Customization

Material Grant Name

CaIWORKS Family Materials Grants

Maximum Budget Allotment

\$

Allocation Categories

x

[+ Add Allocation Category](#)

Cancel Save

3 Next enter the 'Maximum Budget Allotment' amount.

The screenshot shows a dialog box titled "Create Material Grant Customization". It has a close button (X) in the top right corner. The form contains the following fields:

- Material Grant Name:** A text input field containing "CalWORKS Family Materials Grants".
- Maximum Budget Allotment:** A text input field containing "\$ 1500". This field is highlighted with a red rectangular border.
- Allocation Categories:** An empty text input field with a red "X" icon on the right side.
- + Add Allocation Category:** A blue link with a plus sign icon.
- Buttons:** "Cancel" and "Save" buttons at the bottom right.

4 Lastly, add an 'Allocation Category.' You may add more than one by clicking on the blue "+ Add Allocation Category" button and entering another allocation category. You may remove one by clicking on the red 'x' next to a category.

Note: Once a Grant has been created, you are unable to edit the saved Category Allocations.

This screenshot shows the same "Create Material Grant Customization" dialog box. The "Maximum Budget Allotment" field is now empty, with only the "\$" symbol visible. The "Allocation Categories" field remains empty with the red "X" icon. The "Add Allocation Category" link and the "Cancel" and "Save" buttons are also visible.

5

Once done entering information for the Grant, click on the blue “Save” button. The Grant will then appear in the “Active” tab.

Create Material Grant Customization

Material Grant Name
CalWORKS Family Materials Grants

Maximum Budget Allotment
\$ 1500

Allocation Categories

First Allocation Category ✕

Second Allocation Category ✕

Third Allocation Category ✕

[+ Add Allocation Category](#)

Cancel **Save**



Active Archived

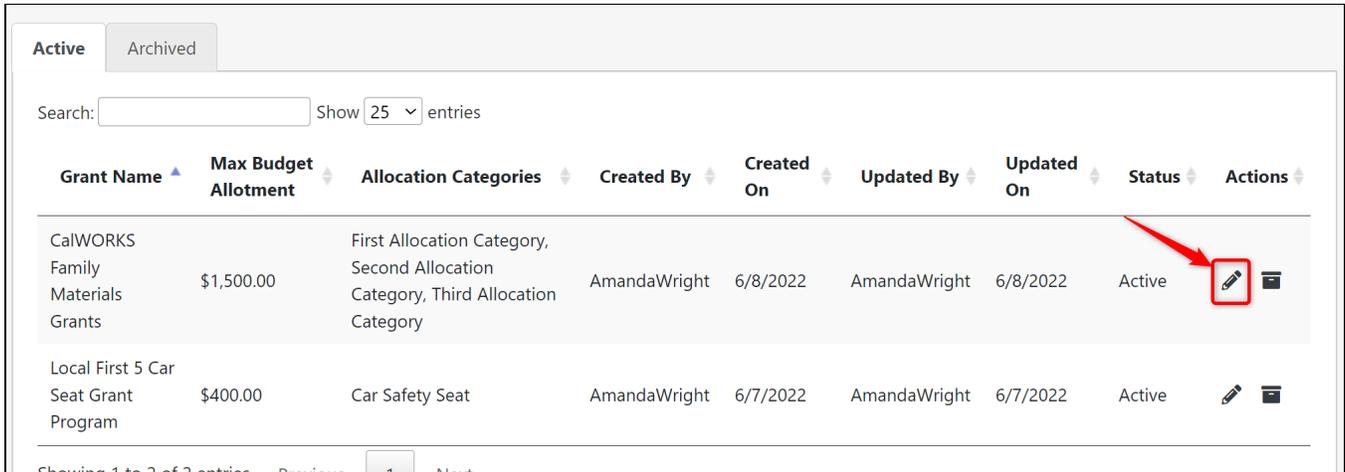
Search: Show 25 entries

Grant Name	Max Budget Allotment	Allocation Categories	Created By	Created On	Updated By	Updated On	Status	Actions
CalWORKS Family Materials Grants	\$1,500.00	First Allocation Category, Second Allocation Category, Third Allocation Category	AmandaWright	6/8/2022	AmandaWright	6/8/2022	Active	
Local First 5 Car Seat Grant Program	\$400.00	Car Safety Seat	AmandaWright	6/7/2022	AmandaWright	6/7/2022	Active	

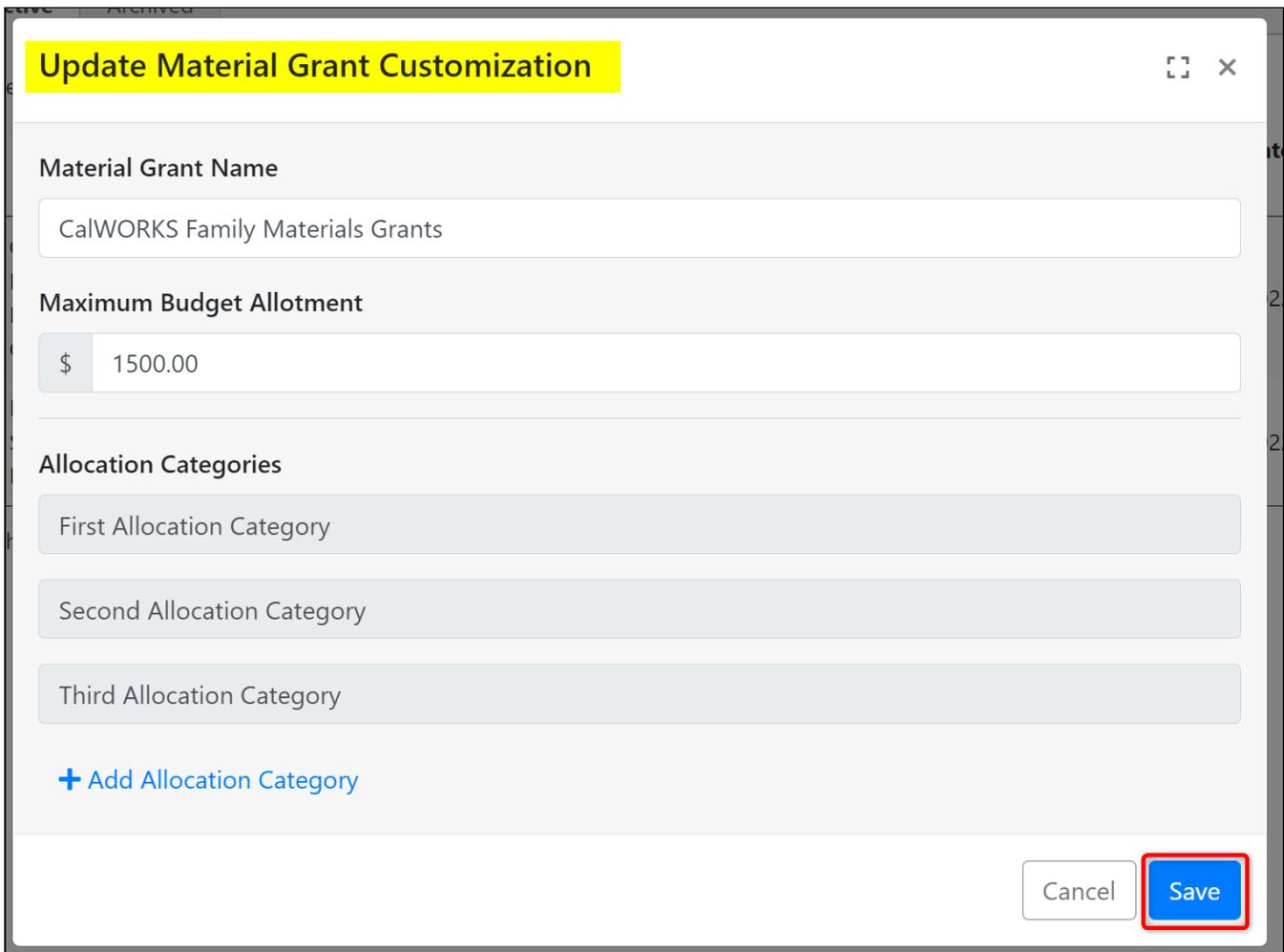
Showing 1 to 2 of 2 entries Previous 1 Next

6

In order to edit an existing Grant, click on the pencil icon on the far right of the grid. In the “Updated Material Grant Customization” modal that opens, you may edit the name and budget amount. Click “Save” when done making edits to save any changes.



Grant Name	Max Budget Allotment	Allocation Categories	Created By	Created On	Updated By	Updated On	Status	Actions
CalWORKS Family Materials Grants	\$1,500.00	First Allocation Category, Second Allocation Category, Third Allocation Category	AmandaWright	6/8/2022	AmandaWright	6/8/2022	Active	 
Local First 5 Car Seat Grant Program	\$400.00	Car Safety Seat	AmandaWright	6/7/2022	AmandaWright	6/7/2022	Active	 



Update Material Grant Customization

Material Grant Name
CalWORKS Family Materials Grants

Maximum Budget Allotment
\$ 1500.00

Allocation Categories

- First Allocation Category
- Second Allocation Category
- Third Allocation Category

[+ Add Allocation Category](#)

Cancel **Save**

Archived Material Grants

To archive an existing Grant, click on the folder icon on the far right of the grid in the “Actions” column. You will be asked to confirm this action, click the blue “Save” button in order to archive the Grant.

The screenshot shows the 'Active' tab of the Custom Material Grants interface. It features a search bar, a 'Show 25 entries' dropdown, and a table with columns: Grant Name, Max Budget Allotment, Allocation Categories, Created By, Created On, Updated By, Updated On, Status, and Actions. The first row is 'CalWORKS Family Materials Grants' with a Max Budget Allotment of \$1,500.00 and Status 'Active'. A red arrow points to the folder icon in the 'Actions' column for this row. The second row is 'Local First 5 Car Seat Grant Program' with a Max Budget Allotment of \$400.00 and Status 'Active'. At the bottom, it says 'Showing 1 to 2 of 2 entries'.



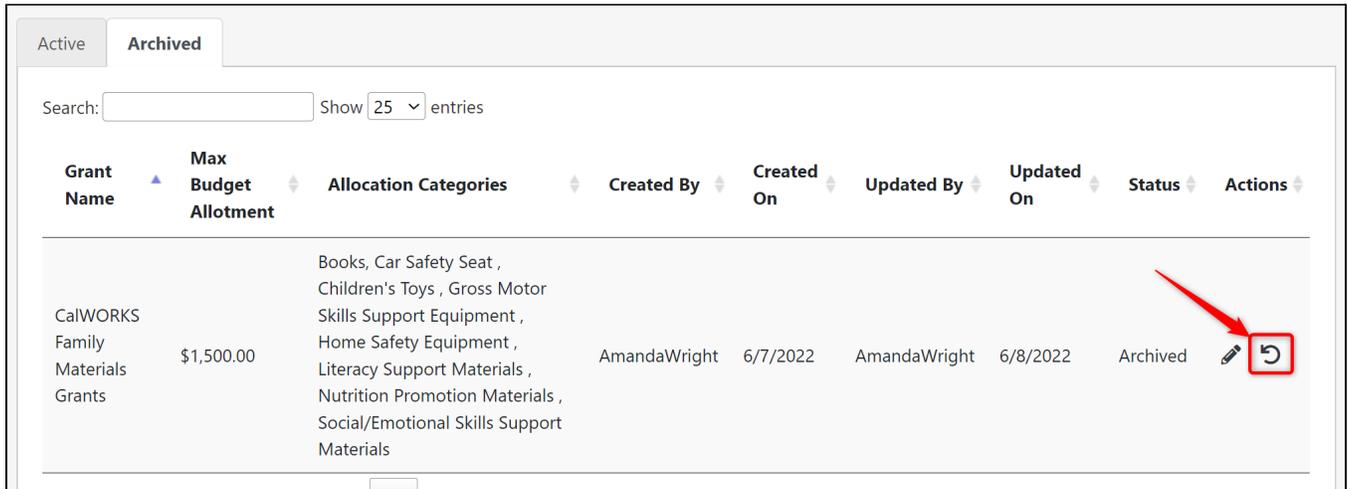
The screenshot shows a dialog box titled 'Archive Material Grant Customization'. The text inside asks: 'Are you sure you want to archive the grant **CalWORKS Family Materials Grants**?'. At the bottom right, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red box.

2 You can find archived Material Grants within the “Archived” tab of the Customize Material Grants record.

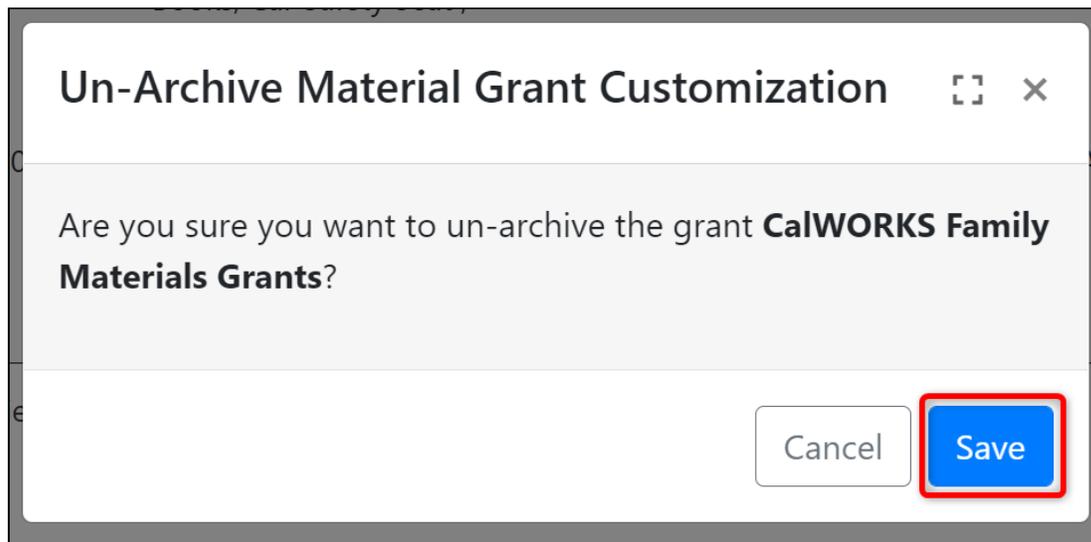
The screenshot shows the 'Archived' tab of the Custom Material Grants interface. It features a search bar, a 'Show 25 entries' dropdown, and a table with columns: Grant Name, Max Budget Allotment, Allocation Categories, Created By, Created On, Updated By, Updated On, Status, and Actions. The first row is 'CalWORKS Family Materials Grants' with a Max Budget Allotment of \$1,500.00 and Status 'Archived'. The 'Archived' status is highlighted with a red box. The Allocation Categories for this grant include: Books, Car Safety Seat, Children's Toys, Gross Motor Skills Support Equipment, Home Safety Equipment, Literacy Support Materials, Nutrition Promotion Materials, and Social/Emotional Skills Support Materials. At the bottom, it says 'Showing 1 to 1 of 1 entries'.

3

To un-archive a Material Grant, click on the circle icon in the “Actions” column. Within the “Archived” tab, can find archived Material Grants within the “Archived” tab of the Customize Material Grants record. You will be asked to confirm this action, click the blue “Save” button in order to un-archive the Grant.



Grant Name	Max Budget Allotment	Allocation Categories	Created By	Created On	Updated By	Updated On	Status	Actions
CalWORKS Family Materials Grants	\$1,500.00	Books, Car Safety Seat , Children's Toys , Gross Motor Skills Support Equipment , Home Safety Equipment , Literacy Support Materials , Nutrition Promotion Materials , Social/Emotional Skills Support Materials	AmandaWright	6/7/2022	AmandaWright	6/8/2022	Archived	



Un-Archive Material Grant Customization [Close] [Maximize]

Are you sure you want to un-archive the grant **CalWORKS Family Materials Grants**?