

Creating Material Grants

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

This instruction sheet will demonstrate how to create Material grants for families, as well as how to add Material Goods to those Grants.

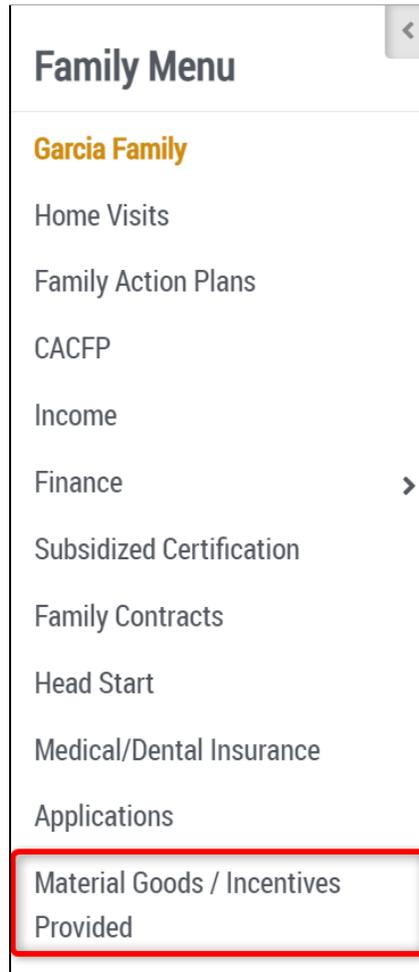
Table of Contents

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

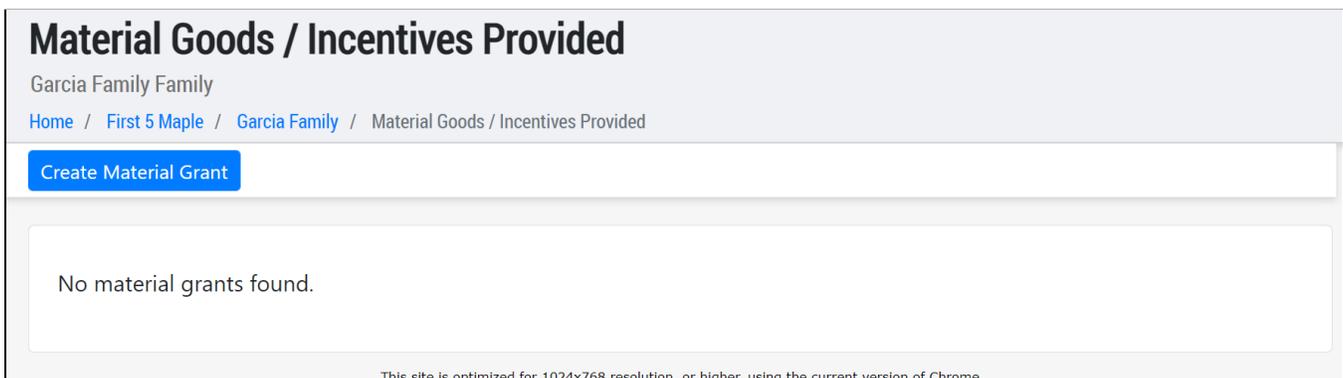
Navigating to Material Goods / Incentives Provided.....	1
Creating a Material Grant.....	2
Adding Material Goods.....	7
Archived Material Grants.....	11

Navigating to Material Goods / Incentives Provided

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

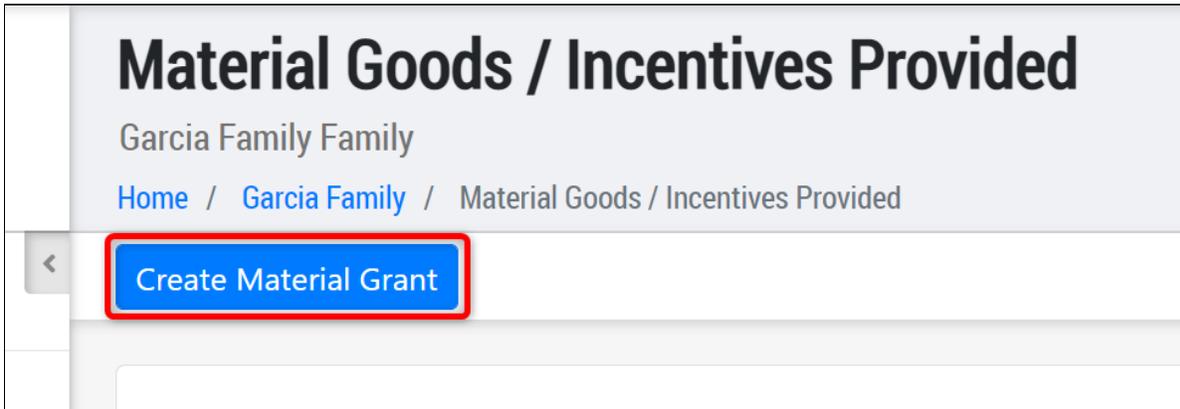


2 You will land on the family’s “Material Goods / Incentives Provided” record.

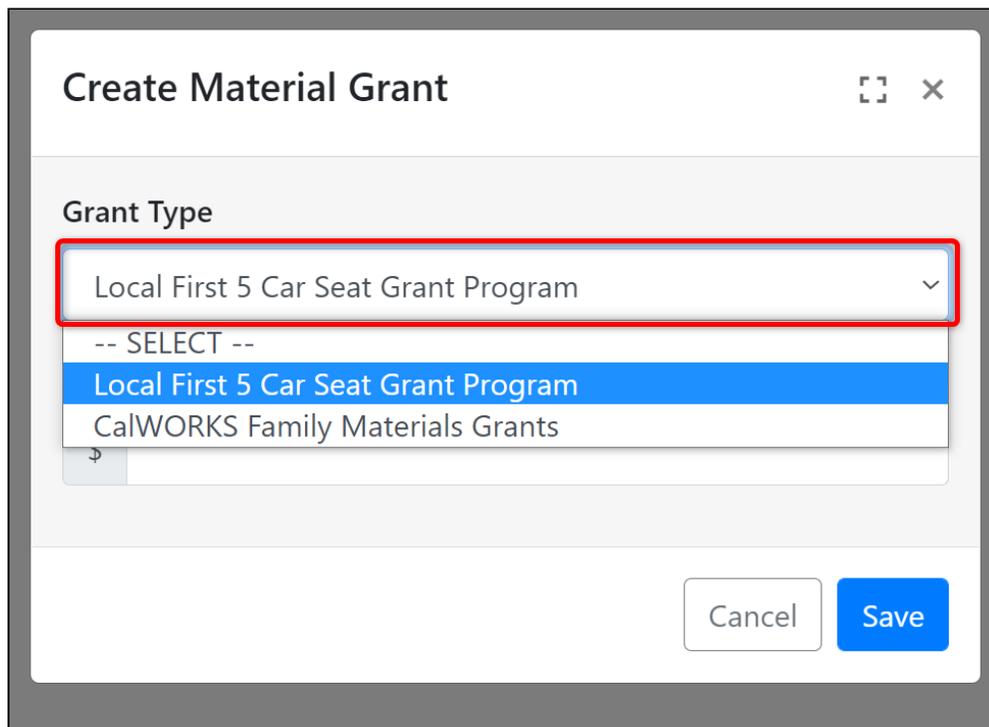


Creating a Material Grant

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. Once you have saved a Material Grant, it will appear in the "Active Material grants" tab of this record.

Create Material Grant [Close] [Fullscreen]

Grant Type
Local First 5 Car Seat Grant Program

Budget Allotment
\$ 150

Cancel Save



Material Goods / Incentives Provided
Garcia Family Family

Home / Garcia Family / Material Goods / Incentives Provided

Create Material Grant

Active Material Grants Archived Material Grants

Local First 5 Car Seat Grant Program Actions

Budget Allotment: \$150.00
Total Estimated Allocations: \$0.00
Total Actual Allocations: \$0.00

Material Goods

4

From the blue Actions drop down you may “Edit Material Grant.” From the “Update Material grant” modal, you can update the selected ‘Grant Type’ and/or the ‘Budget Allotment’.

The screenshot shows a web interface with two tabs: "Active Material Grants" (selected) and "Archived Material Grants". Below the tabs is a card for a grant titled "Local First 5 Car Seat Grant Program". To the right of the title is a blue "Actions" dropdown menu. The dropdown menu is open, showing three options: "Edit Material Grant" (with a pencil icon), "Archive Material Grant" (with a trash icon), and "Delete Material Grant" (with a trash icon). Below the dropdown menu, there are fields for "Budget Allotment", "Total Estimated", and "Total Actual Allocations: \$0.00". At the bottom of the card is a blue button labeled "Material Goods".

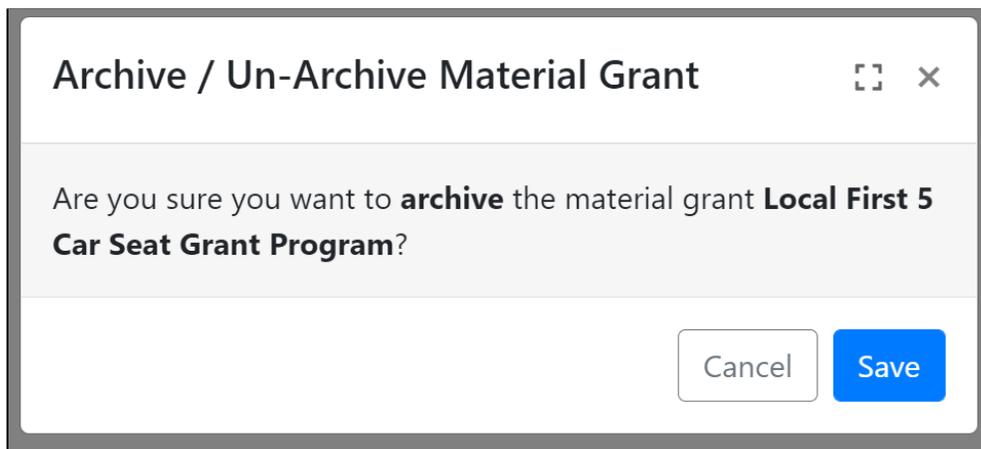
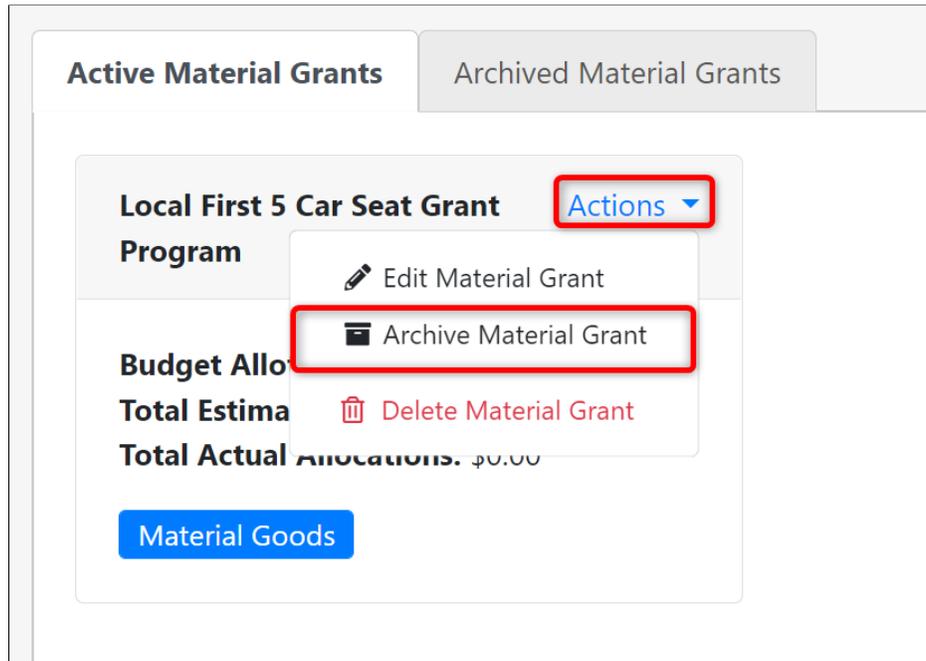


The screenshot shows a modal window titled "Update Material Grant" with a close button (X) in the top right corner. The modal contains two sections: "Grant Type" and "Budget Allotment". The "Grant Type" section has a dropdown menu currently showing "Local First 5 Car Seat Grant Program". The "Budget Allotment" section has a text input field with a dollar sign icon and the value "175.00". At the bottom right of the modal are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red border.

5

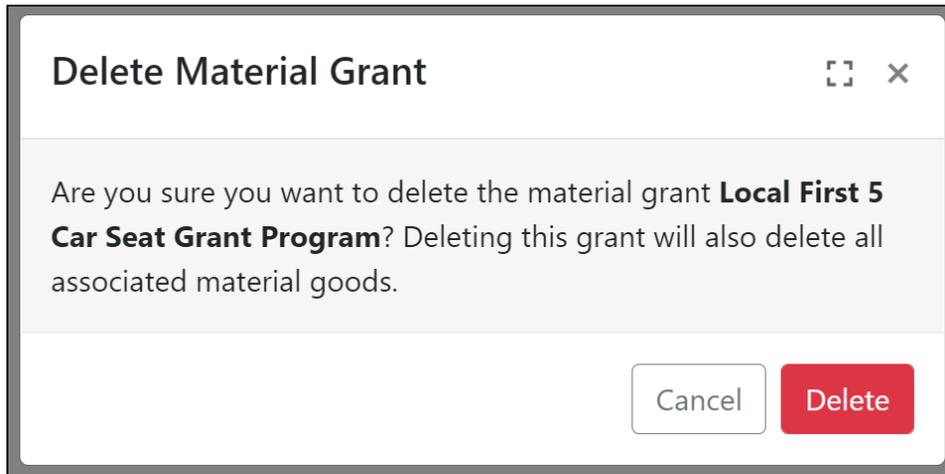
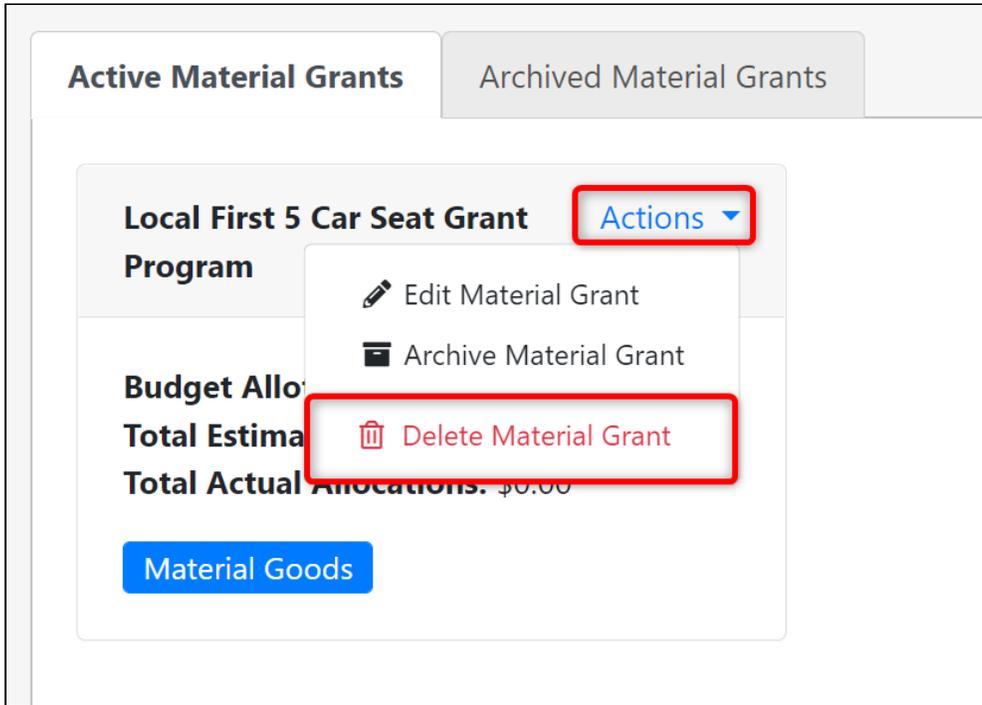
From the blue Actions drop down you may “Archive Material Grant.” You will be asked to confirm this archival. Once confirmed, this will move the Grant into the Archived Material grants tab on this record.

More on archived Material Grants in a section below.



6

From the blue Actions drop down you may “Delete Material Grant.” You will be asked to confirm this action. Once confirmed, the Grants will be deleted from the family’s record.



Adding Material Goods

To add Material Goods to a Material Grant, click the blue “Material Goods” button within the Material grant of your choice.

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

Local First 5 Car Seat Grant Program Actions ▾

Budget Allotment: \$150.00
Total Estimated Allocations: \$0.00
Total Actual Allocations: \$0.00

Material Goods

2 You will land inside the Material Grant record. Click on the blue “+Add Material Good” button.

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 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		

Material Goods + Add Material Good

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.”



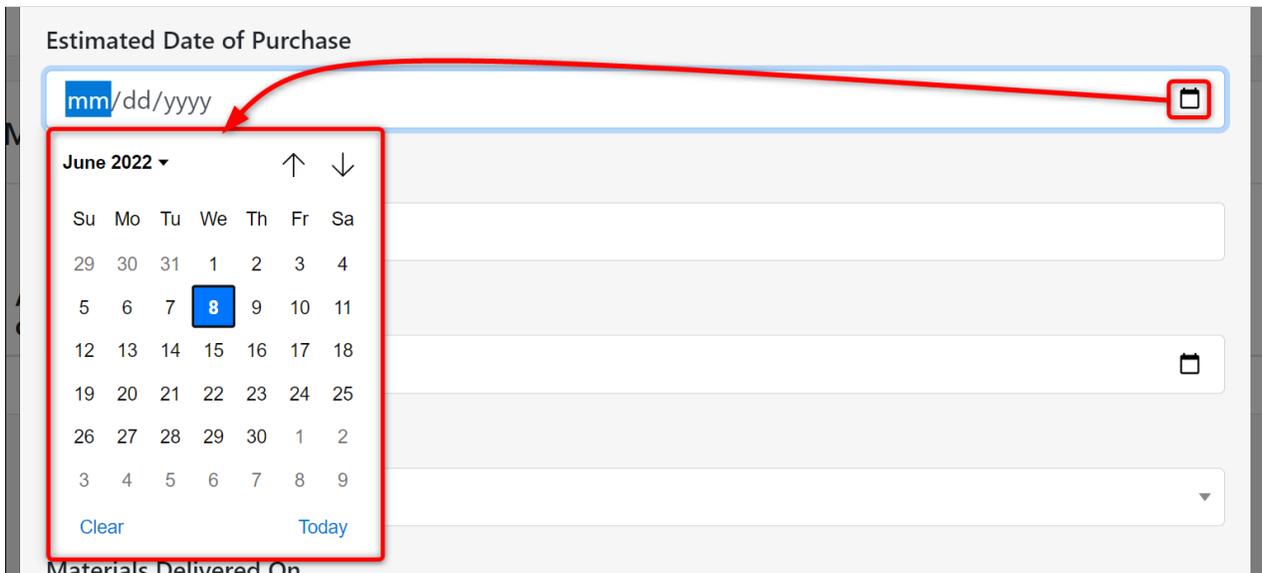
The screenshot shows a modal window titled "Add Material Good". Inside, there is a section labeled "Allocation Category" with a dropdown menu. The menu is open, showing options: "-- SELECT --" and "Car Safety Seat". The "Car Safety Seat" option is highlighted in blue. A red box highlights the dropdown menu area.

4 Next add an “Allocation Cost Estimate” amount.



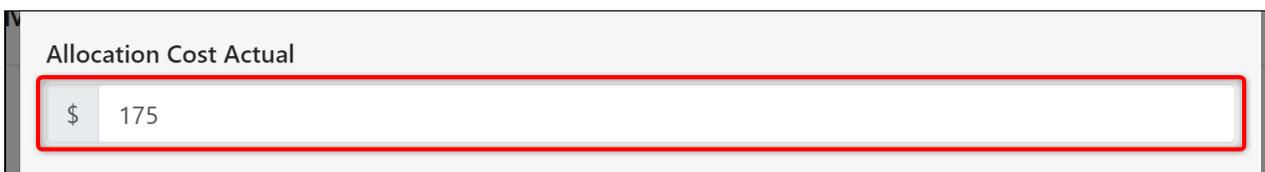
The screenshot shows a field labeled "Allocation Cost Estimate". The field contains the text "\$ 200". A red box highlights the input field.

5 Add an “Estimated Date of Purchase” by typing in the date or choosing from the calendar icon’s calendar view tool.



The screenshot shows a field labeled "Estimated Date of Purchase" with a placeholder "mm/dd/yyyy" and a calendar icon. A calendar view is open, showing the month of June 2022. The date "8" is selected. A red arrow points from the calendar icon to the date "8". A red box highlights the calendar view.

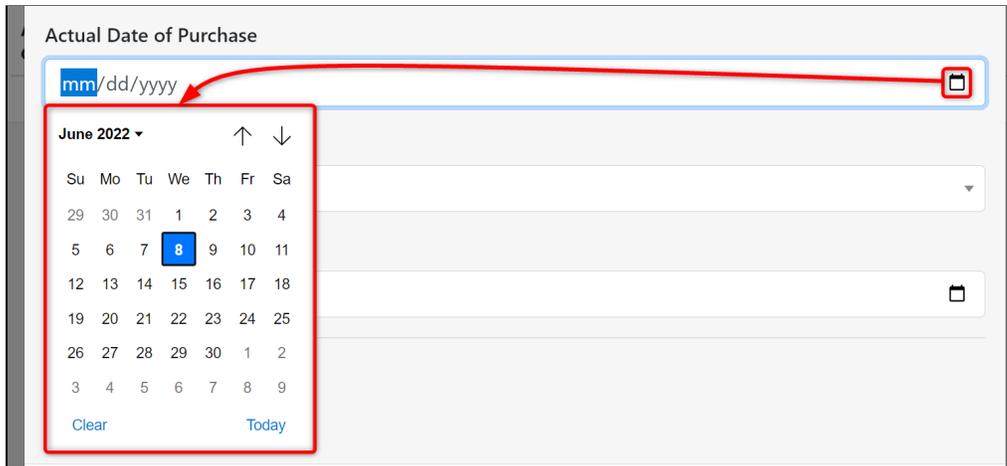
6 Enter the “Allocation Cost Actual” once the purchase has been made. This is the final cost once purchased.



The screenshot shows a field labeled "Allocation Cost Actual". The field contains the text "\$ 175". A red box highlights the input field.

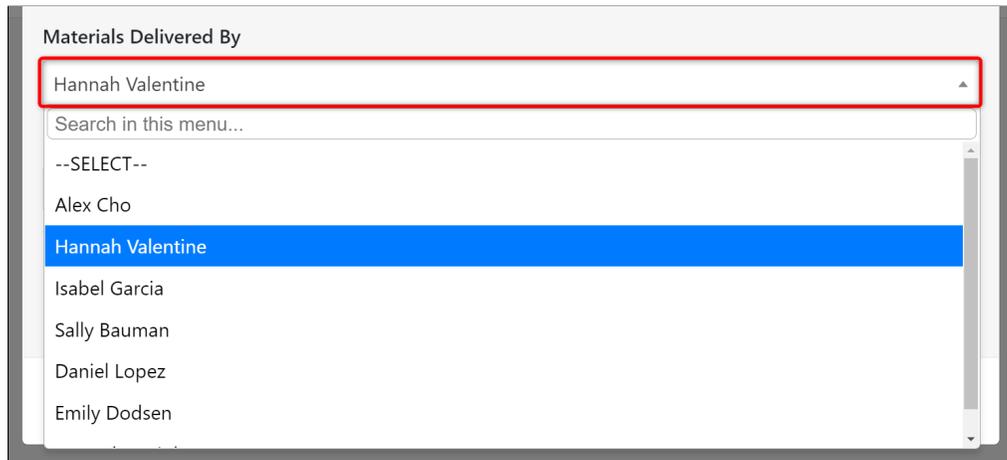
7

Add an “Actual Date of Purchase” by typing in the date or choosing from the calendar icon’s calendar view tool.



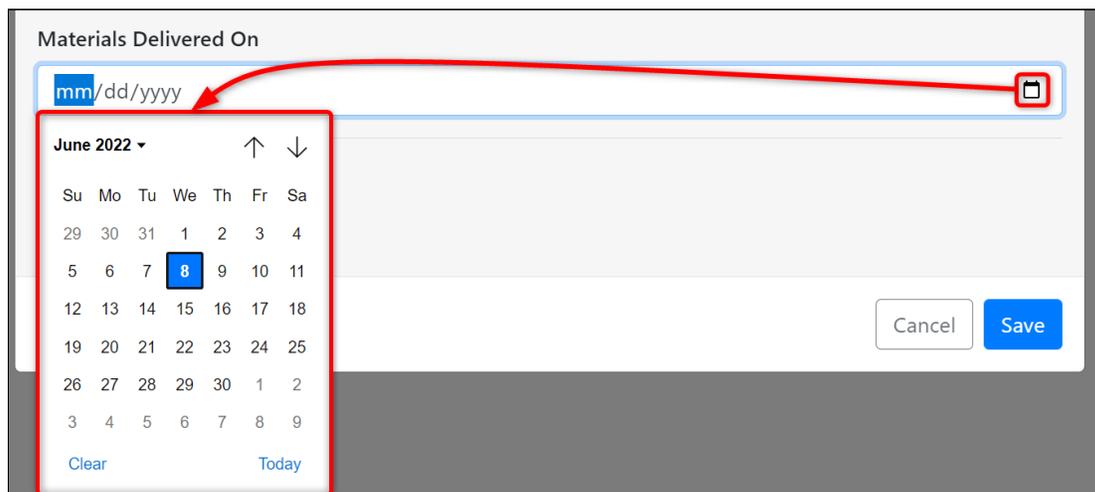
8

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

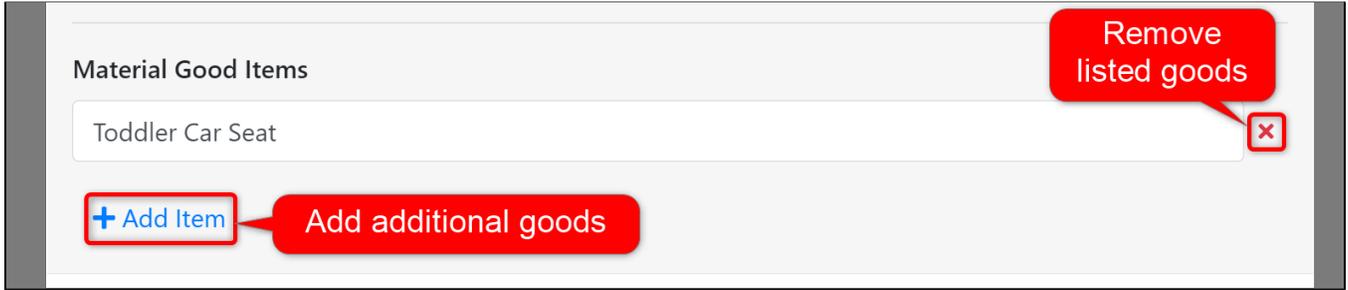


9

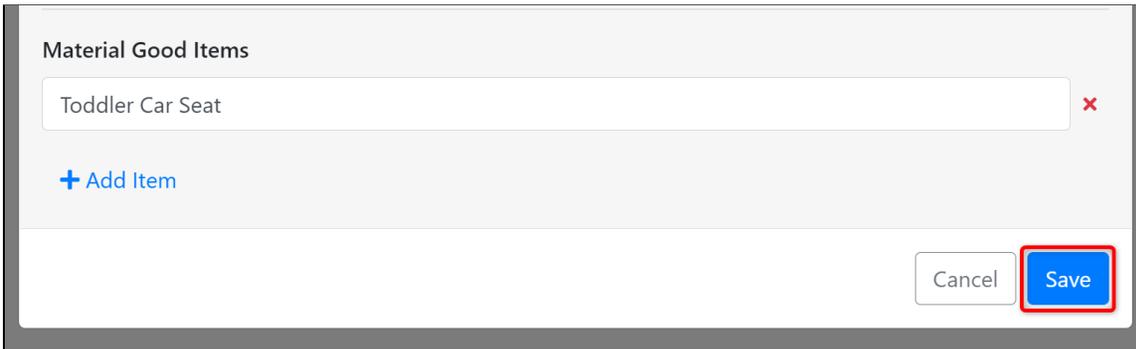
Add a “Materials Delivered On” date by typing in the date or choosing from the calendar icon’s calendar view tool.



10 To specify the Material Good(s) purchased and delivered, click on the blue “+Add Item” button at the bottom of the modal.



8 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](#)

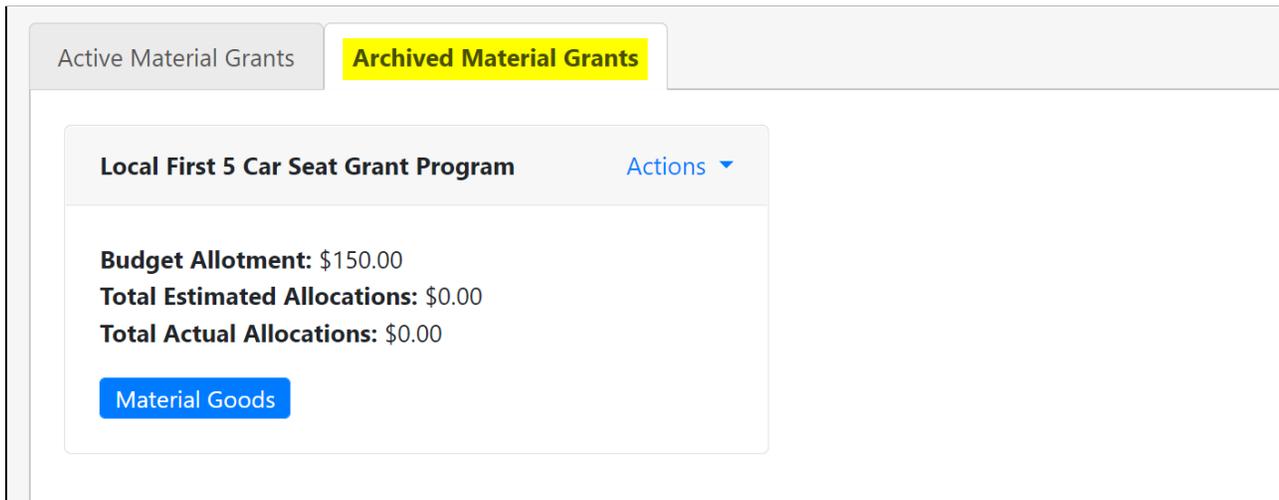
Material Grant ID MG12255042	Budget Allotment \$150.00	Total Estimated Allocations \$200.00	Total Actual Allocations \$175.00
Created By HannahValentine on 6/8/2022	Updated By AmandaWright on 6/8/2022		

Material Goods [+ Add Material Good](#)

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
Car Safety Seat	0	\$200.00	6/8/2022	\$175.00	6/8/2022	Toddler Car Seat	Hannah Valentine	6/8/2022	AmandaWright on 6/8/2022	AmandaWright on 6/8/2022	

Archived Material Grants

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



- 2 To un-archive a Material Grant, click on the “Un-Archive Material Grant” option from the Actions dropdown. You will be asked to confirm this action, click the blue “Save” button in order to un-archive the Grant. This will move the Grant back to the “Active Material grants” tab.

