Intro to Zengine
Creating an Account and Document Submission

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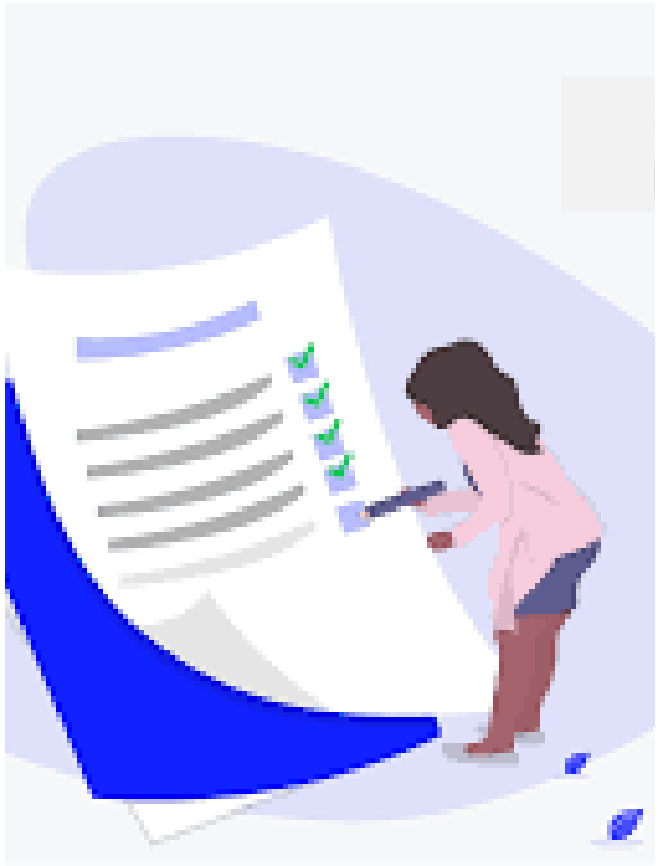
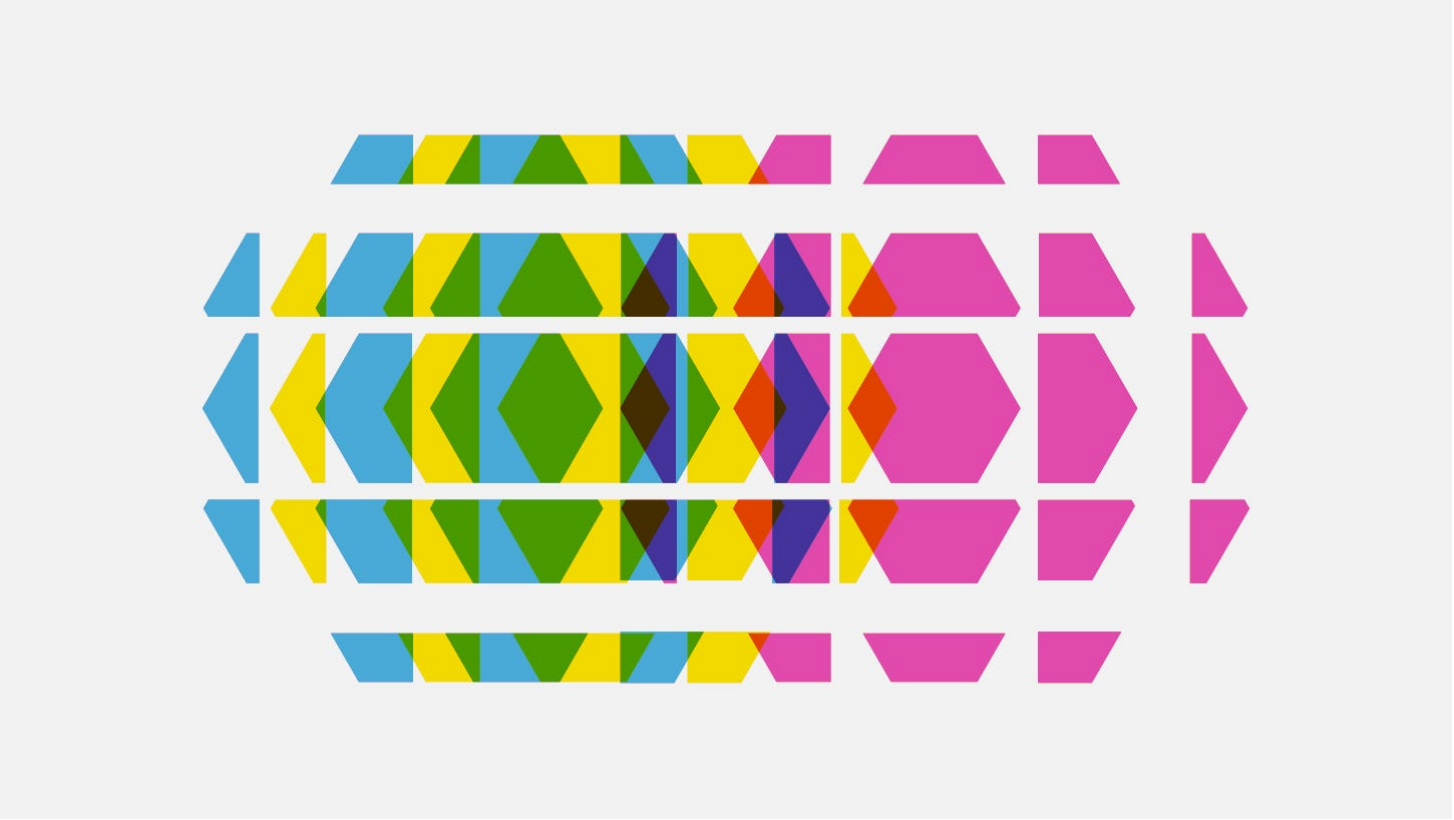
Agenda

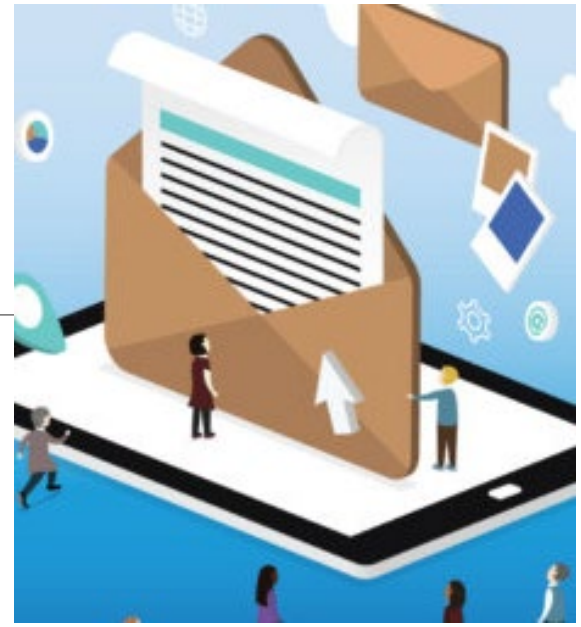


- Purpose of the Database
- Creating an Account
- Submitting Documents
- Priorities
- Resources



Purpose and Background for Database

Grant Management Database



Beginning this month, Zengine will be the method for collecting provider grant-related documents

- No longer collect documents via email
- An organized repository for all HUD CoC grant information

Providers will be responsible for reviewing Zengine contact information quarterly

- Primary means of collecting contact information from which notices/reminders, etc. are generated
- Zengine contacts are updated to Constant Contact email distribution list
  - Do NOT have to sign up on CT BOS website **&** Zengine for Grantee list
  - Do have to sign up on CT BOS website if want to be on the Steering Committee List

Purpose (2)

- Documents to be collected:
  - Renewal Applications for Annual CoC Competition
  - Renewal Evaluation Forms
  - Monitoring Documents
  - RFPs
  - More
- Facilitate processes
  - Set deadlines
  - Send group emails
  - Track submissions

Who must sign up?

Each project on the project list, must create a Zengine account.

- Each project (sub-project, if relevant) will have a user account
  - There can be more than 1 project attached to same user account
- If more than 1 provider agency involved in a CoC grant, and/or project recipient is DMHAS/DOH, each provider agency must create a user profile
- If no service provider assigned to a DMHAS project, the DMHAS LMHA must create the profile

Before You Start

When creating a Zengine Contact Profile you will:

- Assign a primary and at least 1 secondary contact
- Third contact is optional
- Provide Executive Director contact information provider agency
- Provide contact information for 2 people who have e-snaps access for provider agency
- Have project's CoC grant ID/IDs ready (format CT1111, or CT1112A)

Only Primary Contact should create an account

- Agencies must share log-in information (email and password) with all users who have permission to update the profile and submit documents

Providers with Multiple Grants

- To use the same account to submit documents for more than one project, email Shannon@HousingInnovations.us.
  - Note the project ID (e.g. CT1111) for which you already designated yourself as primary in Zengine.
  - Tell us all the additional project IDs for which you are the primary contact.
- If you want to use a different Zengine user account to submit documents for two or more projects, each primary user must create a Zengine User Profile.
- Remember, each CT BOS Zengine user can be associated with more than one project.

DMHAS, DOH and YHDP Grants

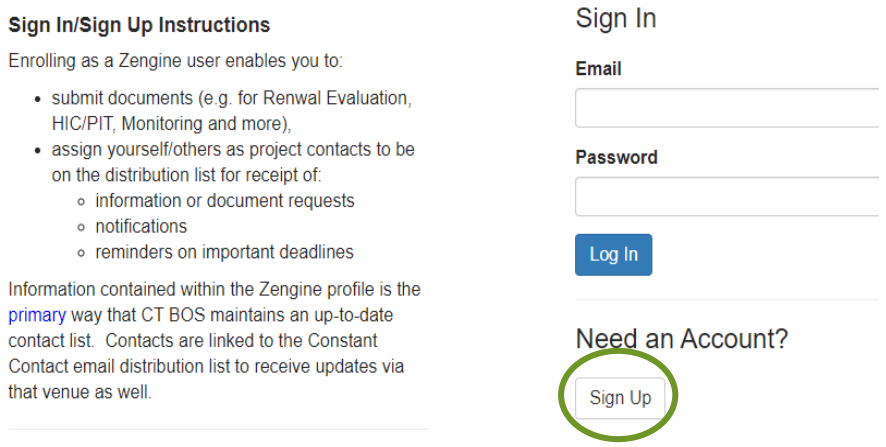
For above categories please insert the DMHAS, DOH or YHDP representative as your **third contact** option.

- DMHAS Providers input Lisa Callahan, Health Program Associate: Lisa.Callahan@ct.gov, 860-262-5352
- DOH Providers input Leigh Shields-Church, Coordinated Access Network Manager: Leigh.Shields-Church@ct.gov, 860-371-9579
- YHDP Providers input Katie Durand, Director of Strategic Initiatives: Kathleen.Durand@ct.gov, 860-270-8076

Creating an Account

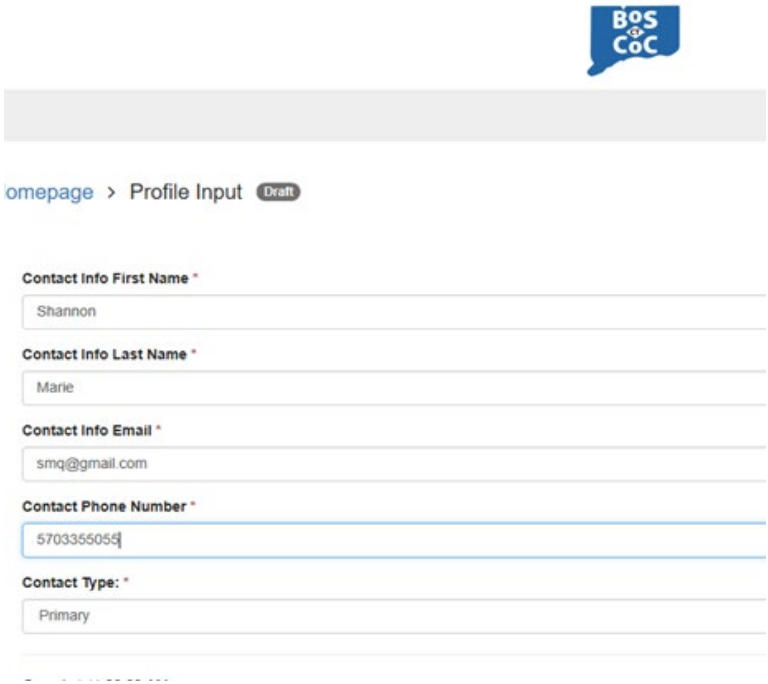
Sign Up

- Go to document submission portal by clicking: https://webportalapp.com/sp/ctbos-documentsubmission
- New users will be instructed to click **Sign Up**
  - Enter email address and create a password
    - Follow instructions indicated for setting up a password
  - Affirm that you have been authorized by your agency to submit data and/or documents into this database by clicking the check box
  - New Users will next be prompted to “Create a Profile”



Create a Profile

- Complete Profile Input
- Fields with an asterisk are required
- Input agency and project for which you are the primary contact on this form.
  - May have to try different naming conventions for agency, or look at dropdown list
- All providers are required to enter:
  - Secondary Contact Information
  - Executive Director Contact Information
  - Contact Information for 2 agency e-snaps users



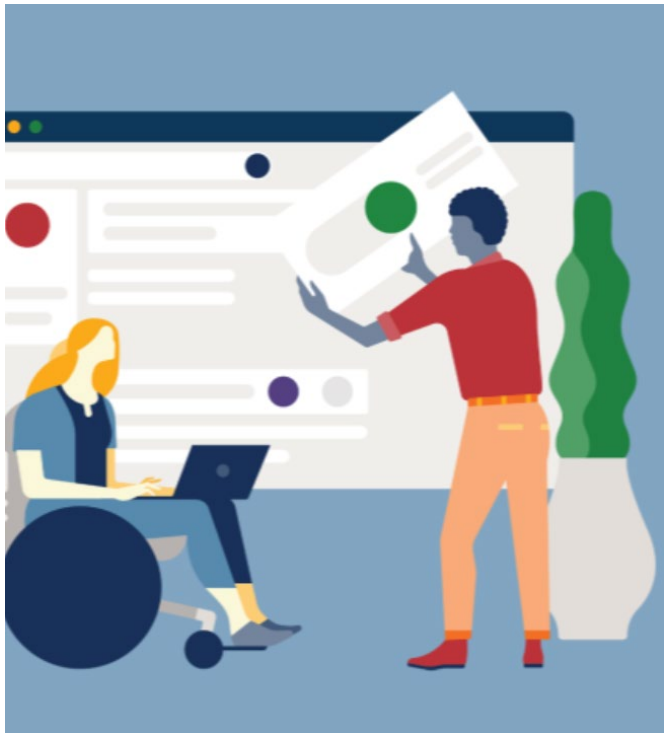
Create a Profile (2)

Can only choose 1 project from dropdown. **If needed, send email to Shannon@HousingInnovations.us with Information on additional projects for which you're primary contact.**

- Choose the Grant # with **2019** Grant Year
- Consolidated Grants use Surviving Grant #

Click "Create Profile" at top or bottom right. If need to leave and return, click "Save Draft", then return, edit and save

The Homepage will appear when your profile is created and a green "complete" will appear to the right of "Profile"



Updates to Profile

Updating Profile:

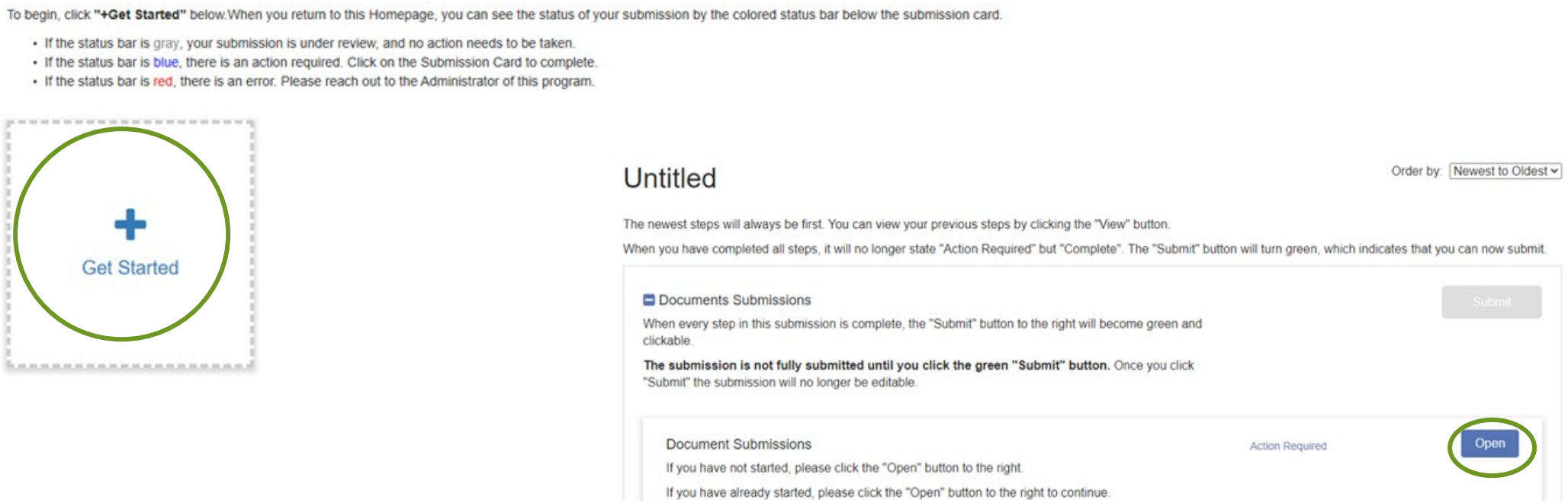
- The contact profile can always be updated by logging into the document submissions portal and clicking the blue “Edit” button
  - Change secondary contact
  - Add third contact
  - Change e-snaps users

To change primary user, email ctboscoc@gmail.com and you will be given further instructions.

Submitting Documents

Document Submission

On the bottom half of the Homepage click “Get Started,” or if not first submission, “+ Add Another.” Then click the blue “Open “ to continue



Document Submission (2)

In the Document Type field, choose the type that was requested when the link was sent, if applicable. If no document type was sent, choose the type most relevant for your document.

Upload your document in the last field by clicking “select a file”

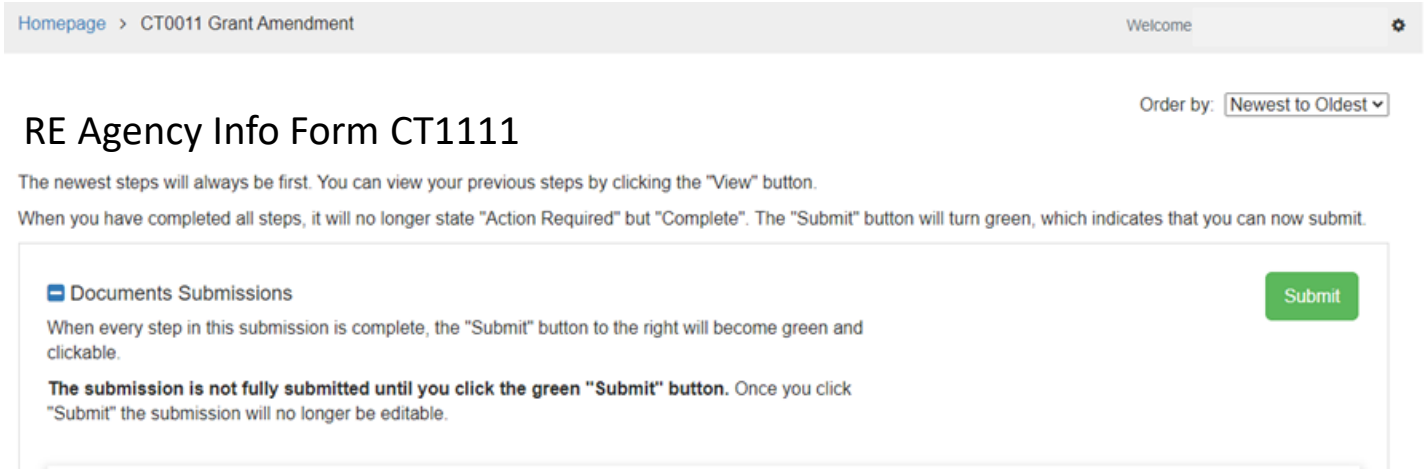
- You will be directed to find the file on your device
- Select the file you desire to upload (the file title will show in the field next to “Select a file”

Should you get interrupted or need to complete later, you may “Save Draft” and return to this using the same document submissions url.

Complete Submission

Click “Mark Complete” in the bottom right, once the correct file has been uploaded and all fields are complete.

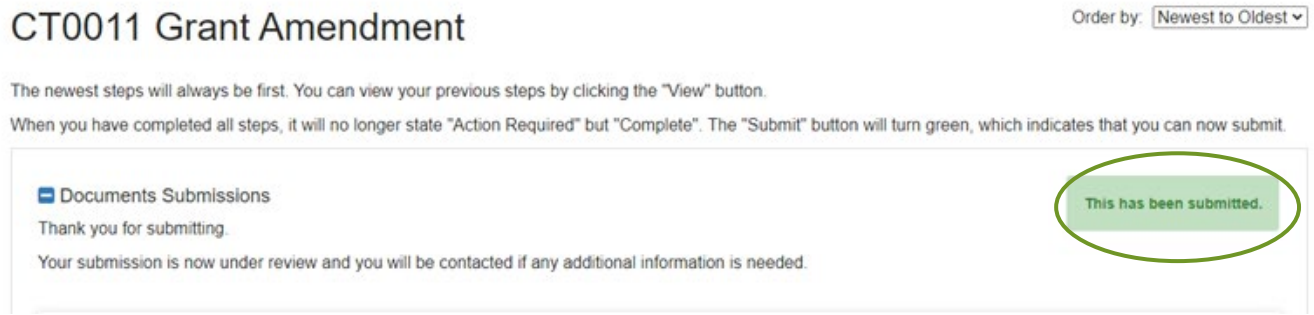
The following screen will appear with title as the document type and grant number:



The Submit button will appear green. Click the button to complete submission.

Complete Submission (2)

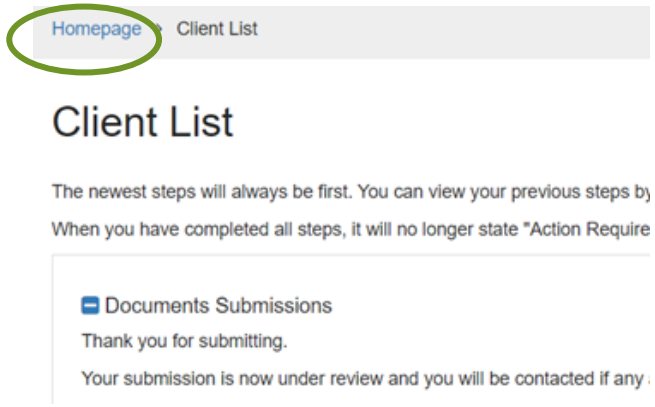
Once the green “Submit” button is clicked, a message will appear saying “This has been submitted”



Once a document has been submitted, it is no longer editable. You may click “View” to show the document information submitted and can download the file if you wish to double check anything.

Additional Submissions

If you have additional documents to upload, return to the Homepage by clicking Homepage or go to this link: https://webportalapp.com/sp/home/ctbos-documentsubmission



Click blue "+Add Another," follow steps to submit and repeat as needed

Priorities

Reminders

Contact Profiles in Zengine - keep our contacts/distribution lists up to date.

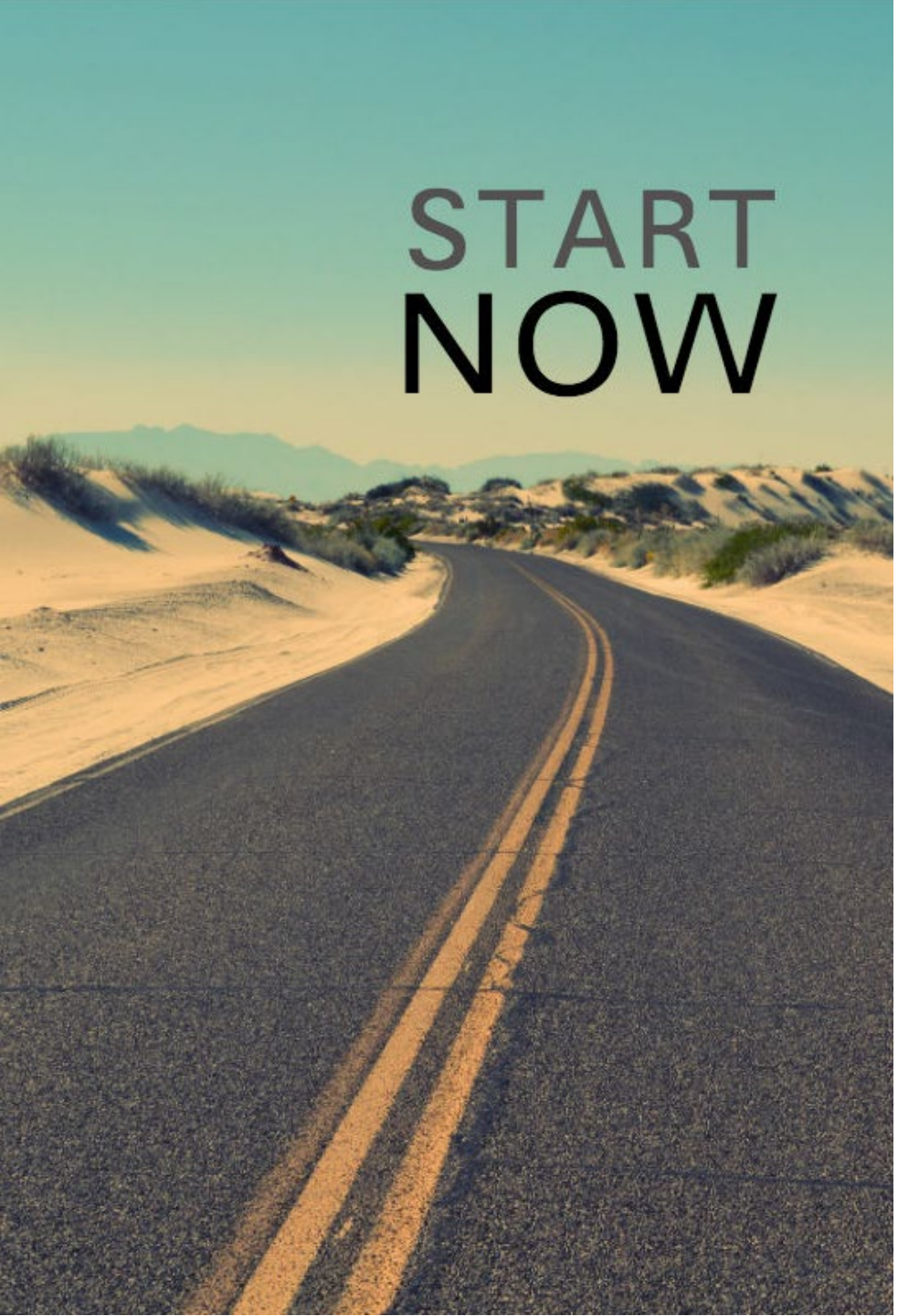
- Generate emails about what is due when
- Track received/not received and send reminders
- Prompted to review at regular intervals
- Contacts auto-enrolled in Constant Contact **grantee** distribution list

Share profile sign-in information with all who have permission to submit documents

Choose the **2019** Grant # when completing the Profile

Email Shannon if your profile supports more than 1 grant

If there are different people/teams who are responsible for different CoC grants in your agency, create **additional contact profiles** for those teams



Reminders (2)

- Zengine is ready **now** for creating Contact Profile and Document Submission
- All Renewal Evaluation documents are required to be submitted in Zengine
  - Due 11/9: Agency Information form and Consumer Surveys
  - Some document types use RE for Renewal Evaluation

Resources

- Projects to Include with consolidated grant information
- How to Create a Zengine Account
- How to Submit Documents

Thank you for participating in the webinar!

WE
ARE IN THIS
TOGETHER
@FRED_THE_ARTIST
#COVID-19
2020
FRED KAEMS

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