



# Airdrie FCSS Portal User Guide for Agencies

A guide on navigating the  
Airdrie FCSS Portal

*Airdrie Social Planning/FCSS team*

---

# Table of Contents

Purpose .....	3
Getting Started .....	4
Access the Airdrie FCSS Portal .....	4
Register your agency .....	4
Introduction to the Airdrie FCSS Portal .....	5
Portal Sections .....	5
Dashboard .....	6
Agency reminders or updates .....	6
Outcome Reports.....	6
Visualized Demographic Data.....	6
Programs .....	7
Program list .....	7
Program Year .....	7
Status.....	7
Date Modified .....	7
Program Name.....	7
Program Details.....	8
Letter of Intent and Application .....	8
Budget Review .....	8
Outcome Measures.....	8
Mid-Year Report .....	9
Reporting Funding Surplus .....	9
Year-End Report .....	9
FCSS Administration Calendar .....	9
Closing Your Program Year and Starting a New Year.....	9
Completing Your Program Three-Year Cycle.....	10
Agency Details.....	11
Agency Information.....	11
Resetting Staff Account Access.....	12
Help & Resources.....	13
Appendix A: Staff Member Permissions .....	14

## Purpose

---

The purpose of this Guide is to support non-profit agencies in navigating the Airdrie FCSS Portal.

The Portal was developed in 2017 to help agencies apply for and manage the administrative requirements of their Airdrie FCSS-funded programs. It was also developed to provide better access to resources and tools that support ongoing internal evaluation of their programs.

Family and Community Support Services (FCSS) funded programs support individuals, families and communities in achieving social well-being and prevent the development of social problems at the earliest opportunity.

### **More Information**

Questions about the Airdrie FCSS Portal? Contact Airdrie FCSS at (403) 948-8800 x8451 or via email at [social.planning@airdrie.ca](mailto:social.planning@airdrie.ca) .

# Getting Started

---

## Access the Airdrie FCSS Portal

Before starting, ensure you can access:

<https://fcss.airdrie.ca>

Non-profit societies that meet FCSS eligibility requirements and are registered under the [Province of Alberta Societies Act](#) or that have a non-profit fiscal agent may apply for City of Airdrie FCSS funding and register on this [Airdrie FCSS Portal](#).

## Register your agency

Click “**Register Your Agency**” below the “Log In” button.

1. Follow the instructions – use the legal name of your organization. You will receive an email to verify your email address. Your password must include a capital letter, a special character (such as @ or ?), and a number. **Note: You will not be able to register an agency that already exists in the system.**
2. Once registered, you may add new staff accounts to your agency profile by selecting Agency Details > Accounts. Your agency may create accounts for as many staff members as you like, but we recommend you only give access to staff members who need access to the Portal. When you add a new account, that individual will receive further instructions via email to confirm their account.
3. You may set the level of access you wish each staff member to have. There are two levels of access. By default, all staff members are given **full access** to all sections of your agency account – including all financial sections, and the ability to submit documents to Airdrie FCSS. Uncheck the “Agency Admin” button to the right of their name box to set **limited access (“Agency user/member”)**. For a full list of permissions, see Appendix A at the end of this Guide.

### Using a tablet, small laptop or mobile phone?

Click “menu” on the Portal to view the tabs such as Dashboard, Program, and Agency Details.

If you have difficulties accessing the Portal, please call Airdrie FCSS at (403) 948.8800 ext. 8451 or email [social.planning@airdrie.ca](mailto:social.planning@airdrie.ca).

# Introduction to the Airdrie FCSS Portal

## Portal Sections

The Airdrie FCSS Portal has three main sections:

1. Dashboard
2. Programs
3. Agency Details

We will go over each section in detail. When using a larger device like a computer, these three sections are listed at the top of each page in a black banner. On a smaller device like a phone, first click "menu" to see the sections. To open a section, click on its title.

The screenshot shows the Airdrie FCSS Portal DEV interface. At the top is a dark blue header with the text 'Airdrie FCSS Portal DEV'. Below this is a black navigation bar with three items: 'Dashboard' (with a bar chart icon), 'Programs' (with a speech bubble icon), and 'Agency Details' (with a group of people icon). A yellow box with the text '3 main sections' has a red arrow pointing to the 'Agency Details' link in the navigation bar. The main content area is titled 'Agency Details' and contains several accordion-style tabs. The first tab is 'Agency Information'. The second tab, 'Board Members', is currently selected and highlighted in green. It contains the text 'Please enter your current board members names and titles.' followed by two input fields: one containing 'Joe Smith' and another containing 'Chair'. Below these fields is a link '+ add another'. At the bottom of the form are two blue buttons: 'Previous' and 'Save'. Below the 'Board Members' tab are two more tabs: 'Documents' and 'Accounts'.

The three sections each have their subsections, set in accordion-type tabs. Simply click on any subsection to open it, click again to close it. Only one section can be open at a time.

### Quick Tip

When entering information into the Portal, don't forget to hit the "Save" or "Save and Continue" button before exiting.

# Dashboard

## Agency reminders or updates

At the top of the first page on the Portal, you may find updates on new system features, as well as short banner messages from Airdrie FCSS staff, such as reminders on documents your agency needs to submit to keep your information up to date; for example:

One or more required Agency documents are missing. Make sure you upload the required documents under the Agency Details tab.

## Outcome Reports

At the top of the Dashboard, you may also view Outcome Reports for your programs, sorted by year. Airdrie FCSS delivers detailed reports on your outcome data, so that you may learn from your data to improve your programming. Outcome Reports are usually posted each spring.

## Visualized Demographic Data

The Dashboard also provides a visual snapshot of your program participants by demographic. Demographic information can help your team:

- understand whether you are really reaching your target population,
- get an idea of the nature of your participants so you can adapt your programming to be most suitable to them, and
- get an idea of who might be missing that you can try to reach in the future.

These charts are populated based on the data you enter into the Portal from your outcome surveys. You can filter these charts by year, program, and survey. In the current year, data is visualized in real time. If you've recently entered survey data into the Portal, the charts will be updated to include what you've just entered. Keep in mind that until all data is submitted for the current year, the charts could be subject to change based on new data yet to be entered.

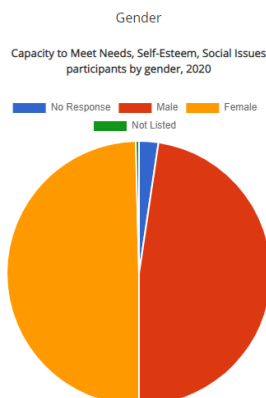
Select a year:

Select an agency:

Select a program:

Select a survey:

Disclaimer: until all data is submitted for the current year, the charts and graphs below must not be considered final and may change. Note: Surveys that do not appear below have not yet had any responses submitted



# Programs

---

The Airdrie FCSS Portal is structured so your agency can submit and view your funding applications, mid-year and year-end reporting, and outcome measures (survey) data under each funded program's 'file.'

## Program list

Your programs are arranged chronologically by year. Within each year, you may re-arrange the list as needed by clicking on any of four column headings: **Program Year**, **Program Name**, **Status**, **Date Modified**. A **search field** on the right allows you to search for programs by name, and the number of **entries viewable per page** can be filtered on the top left "Show \_ entries" field as well.

## Program Year

Indicates the funding year covering a specific program.

## Status

Shows the current status of each program.

## Date Modified

Shows the date that program information was last modified by either the agency or FCSS staff.

## Program Name

Clicking on a given program name will bring up the Program page where **you can view that program's details**.

**Six tabs** at the top of the page correspond to various aspects of the program life cycle: **Program Details**, **Letter of Intent**, **Application**, **Outcome Measures**, **Mid-Year Report** and **Year-End Report**.

Access to specific tabs is restricted according to the current time in the annual life cycle. In general, the leftmost tabs are accessible earlier on, while the rightmost tabs come into play later.

Even though most programs are funded for a three-year term, on the Portal each program is managed on an annual basis, as outcome measures (surveys), mid-year reports, and year-end reports occur annually. You will not need to complete a new Letter of Intent or application for Year 2 or Year 3.

### Quick Tip

We recommend Portal users save important entries outside of the Portal (e.g., in a Word document) to serve as back-up copy should anything happen to their Portal entries.

## Program Details

Please note that the "Program Manager" field refers to the person that directly manages the program and not the agency leader (e.g., Executive Director, CEO or Chair).

## Letter of Intent and Application

Every three years, Airdrie FCSS holds a call for applications, usually starting in late spring or early summer of the year prior to the start of the new funding cycle. The application process has two parts: the Letter of Intent (LOI) and Application.

For instructions, see the **Portal Application Guide**, which you can access by visiting <https://fcss.airdrie.ca>, clicking "Agency Resources" and selecting "**Letter of Intent & Application Guide**." For more information, see the **Airdrie FCSS FAQ** also found in "Agency Resources."

**Please note: Airdrie FCSS will not accept applications after the deadline.**

## Budget Review

A program enters "Budget Review" when it was funded a different amount than was requested in the Application. Before you can access the Outcome Measures or Mid-Year Report, you must update your budget line items to reflect the amount your program was actually funded.

Update your Expenditures line items so that their total equals the amount in grey under "Revenues," City of Airdrie FCSS for the current year. Click "Submit Updated Budget" at the bottom of the page. Airdrie FCSS will review your update and in most cases, approve it. Otherwise, they will contact you (usually by email) and re-open "Budget Review" for you to make corrections and submit again.

If your program Application has not yet been approved or is still in Budget Review, the Outcome Measures tab will show in grey and you will not be able to click into it. Once your Application and Budget Review are approved, the tab will show in blue and you will be able to access it.

### Did You Know

Information on the Airdrie FCSS Portal is secured with data-encryption. With this, client-identifying information and other sensitive data is shielded from direct access. The City of Airdrie also conducts regular third-party vulnerability testing on its network to ensure compliance with best practices in software security.

## Outcome Measures

Outcome measures are the way that the Province of Alberta, in partnership with Airdrie FCSS, evaluates its funded social programs. Airdrie FCSS will meet with you before your program starts to discuss outcome measures in more detail. Survey data is submitted each year via the Portal.



For instructions, see the **Survey Data Entry Guide**, which you can access by logging in and clicking "Help & Resources" on the top right (or if you are on a smaller device, clicking "menu" first).

For guidance on increasing the number of program participants that complete a survey, see the resource, **Surveys: Tips for Achieving a Higher Response Rate** in that same Help & Resources tab.

If you see the following message (this is most likely to happen earlier in the year):

**The FCSS team has not yet linked a survey or surveys to this program. Please contact City of Airdrie Social Planning**

Please contact the team to inform them you are ready to enter your survey data, and they will enter your survey(s) shortly so that you can access them.

### **Mid-Year Report**

Your Mid-Year Report is due typically by the close of business hours of the first business day in July of the funding year. Mid-Year Reports are required for every year a program is funded. All Mid-Year Reports (Outcomes and Program) must be submitted on or before the deadlines. The Portal will be set to close after the deadline date and time. All sections of the Mid-Year Reports must be filled out.

### **Reporting Funding Surplus**

If program funding will not be used during the reporting funding year by the agency, you must let Airdrie FCSS know by written correspondence or by email by the close of business hours of the first Friday in September of the funding year. Arrangements will be made for FSSS funded programs to return all unused funding for the reporting year.

### **Year-End Report**

Year-end reports are due for end of the year and must be submitted typically by the close of business hours of the last Friday in January of the next year. Final reports are required for every year a program that is funded. All Year-End Reports (Outcomes and Program) must be submitted on or before the deadline. The Portal will be set to close after the deadline date and time. All sections of the Year-End Report must be filled out.

### **FCSS Administration Calendar**

Funded agencies are responsible for staying informed on **reporting deadlines and other key Airdrie FCSS dates** by referring to the current FCSS Calendar found by visiting the home page of the FCSS Portal <https://fcss.airdrie.ca>, clicking on "Agency Resources" and selecting "**FCSS Administration Calendar**."

### **Closing Your Program Year and Starting a New Year**

At the beginning of each year, Airdrie FCSS will 'close' your program for the previous year ending December 31<sup>st</sup>. This will usually be done in January or early February, once the Airdrie FCSS team

has had time to review all year-end reports. Once 'closed,' if your program is in year two or three of a three-year funding term, the new year will 'open' for your program and you will be able to access the new year for that program.

Some programs will return to Budget Review (see above), but in most cases your program will skip ahead to the new outcome measures and mid-year report tabs. If one or more of these tabs remains closed, it is past January, and you would like to access them to enter data, then please let the Airdrie FCSS team know.

### ***Completing Your Program Three-Year Cycle***

At the end of your three-year program cycle, you will submit your final report and outcome measures as usual. In the summer prior to the new funding cycle, you will have the opportunity to apply for another funding term.

The FCSS application process for a **new funding cycle** will require you to submit a **NEW Letter of Intent and NEW Application**, that will include submitting a **NEW Program Logic Model** for the FCSS program. Agencies previously funded will have the ability to copy and paste from previous applications if relevant to the new program that they are applying for. (Please be aware that previously funded programs do not guarantee funding for your program and/or service in the next funding intake).

# Agency Details

---

Under the main section tab "Agency Details," you may enter, view and update all agency details for your organization. There are four sections:

- Agency Information
- Board Members
- Documents
- Accounts

To view the details of any section, simply click on the title of the section you wish to view, and it will open up accordion-style. To close it, click the title again.

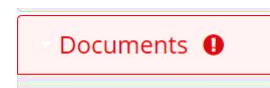
## Agency Information

Staff registering an agency account on the Portal will be prompted to complete the Agency information sections, including the agency's mission and vision statements, agency phone number, and so on. **Agencies are required to update their agency information and keep documents current for the duration of the funding agreement.**

**Agency details and documents can be changed and updated at any time** by re-visiting this tab. Don't forget to save your information before exiting.

- Agency Name - use the legal name of your organization.
- Board Members - enter the current list of board members. This list must be kept current.
- Documents - upload the following:
  - Annual agency Financial Statement
  - Insurance Certificate, including the current expiration date (use save button)
  - Certificate of Incorporation under the Societies Act
  - Constitution and Bylaws
  - Organizational chart

\*Upload these documents before beginning a program application. To upload a document, simply click "Upload" next to the appropriate document. Specific documents are required; these fields will be highlighted in red, and a red symbol on the Documents tab will indicate if you are missing any documents.



- Accounts

You may add new accounts for your agency at any time by selecting "Agency Details" and "Accounts." Your agency may create staff accounts for as many staff members at your agency that need access to the Portal. When you add a new account, that individual will receive further instructions via email to confirm their account.

4. You may set the **level of access** you wish each staff member to have. There are two levels of access. By default, all staff members are given **full access** to all sections of your agency account – including all financial sections, and the ability to submit documents to Airdrie FCSS. Uncheck the “Agency Admin” button to the right of their name box to set **limited access (“Agency user/member”)**. For a full list of permissions, see Appendix A at the end of this Guide.

### ***Resetting Staff Account Access***

In cases of forgotten passwords, “Agency admins” are able to reset passwords for other account users by clicking on the orange “Reset Password” button. A system email will be sent to the account user with instructions on resetting their password.

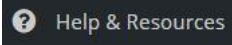
In the event that an agency is unable to access their Portal account due to a lack of account users (e.g., staff changes), please contact Airdrie FCSS for assistance.

## Help & Resources

---

Airdrie FCSS wants your program to succeed. To that end, we have compiled a series of resources to help you navigate Airdrie FCSS processes and help you improve your Theory of Change, increase your survey response rate, and more.

There are two ways to access our Help & Resources:

1. Visit <https://fcss.airdrie.ca> and click "Agency Resources" for an incomplete list offered to the public. It does not include resources useful solely for currently funded agencies.
2. To see the **full list of resources for currently funded agencies**, log in to the Portal, and click the "Help & Resources" tab at the top right  (or if you are on a smaller device, click "menu" first).

Resources are added and updated regularly for your reference. These include:

- Frequently Asked Questions
- Letter of Intent & Application Guide
- Survey Cover Page and Survey Demographic Questions
- Survey Data Entry Guide
- Theory of Change Resources
- Portal User Guide (this document)
- And more!

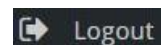
Beyond resources found on the Portal, Airdrie FCSS also provides capacity building support in the form of training by staff or experts (on topics such as Theories of Change and Program Logic Models), and support for any questions that may arise throughout the funding term.

The Airdrie FCSS team encourages agencies to be proactive: if you have any further questions or concerns, do not hesitate to reach out!

### Logging Out

Before you log out of your Portal account, make sure you have saved any changes in the appropriate sections of your updated information.

The Logout button is located at the top-right of the screen with an arrow symbol.



---

**If you have any further questions about the Airdrie FCSS Portal,  
please contact the Airdrie FCSS team at 403.948.8800 ext. 8451  
or email [social.planning@airdrie.ca](mailto:social.planning@airdrie.ca)**

## Appendix A: Staff Member Permissions

You may set the level of access you wish each staff member to have on the Airdrie FCSS Portal. There are two levels of access: Agency Admin, and Agency User/Member.

To give a staff member full access to all sections of your agency portal, log in to the Airdrie FCSS Portal, click on "Agency Details" on the top right, scroll down to the "Accounts" tab, and check "Agency Admin" to the right of their name. Uncheck the box to limit their access.

The following table describes the two levels of permission.

Permissions	Agency Admin	Agency User/Member
Edit Agency Details: <ul style="list-style-type: none"><li>Agency Information</li><li>Board Members</li><li>Documents (Upload/Delete)</li></ul>	Full access and ability to add/remove agency members and grant admin access to agency users.	Read-only.
Creation/Edit of a Program: <ul style="list-style-type: none"><li>Program Details</li></ul>	Full access. Read-only once form is submitted.	Full access. Read-only once form is submitted.
Creation/Edit of a Letter of Interest (LOI): <ul style="list-style-type: none"><li>Editing</li><li>Submission</li></ul>	Full access. Read-only once form is submitted.	Editing only (no permissions to submit) No access to budget (can't edit or view) Read-only once form is submitted.
Creation/Edit of an Application: <ul style="list-style-type: none"><li>Editing</li><li>Submission</li></ul>	Full access. Read-only once form is submitted.	Editing only (no permission to submit). No access to budget (can't edit or view). Read-only once submitted.
Edit Budget Information: <ul style="list-style-type: none"><li>Editing</li><li>Review</li><li>Submission</li></ul>	Full access. Read-only once form is submitted with the exception of updating budget information if allocation of funds is different than request.	No access (can't edit or view).
Creation/Edit of a Mid-Year-Report: <ul style="list-style-type: none"><li>Editing</li><li>Submission</li></ul>	Full access. Read-only once form is submitted.	Editing only, except budget portion (can't edit or view). No permission to submit.
Creation/Edit of a Year-End-Report: <ul style="list-style-type: none"><li>Editing</li><li>Submission</li></ul>	Full access. Read only once form is submitted.	Editing only, except budget portion (can't edit or view). No permission to submit.
Outcome Measures	Full access.	Full access.