

EFA Tool Training Guide

Expanded Critical Supports Program

Updated April 2021



The Jewish Federations®
OF NORTH AMERICA

Center on Aging
and Trauma

For more information about the EFA Tool Training Guide,
please contact The Jewish Federations of North America's Center on Aging and Trauma at
Aging@JewishFederations.org



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1. INTRODUCTION

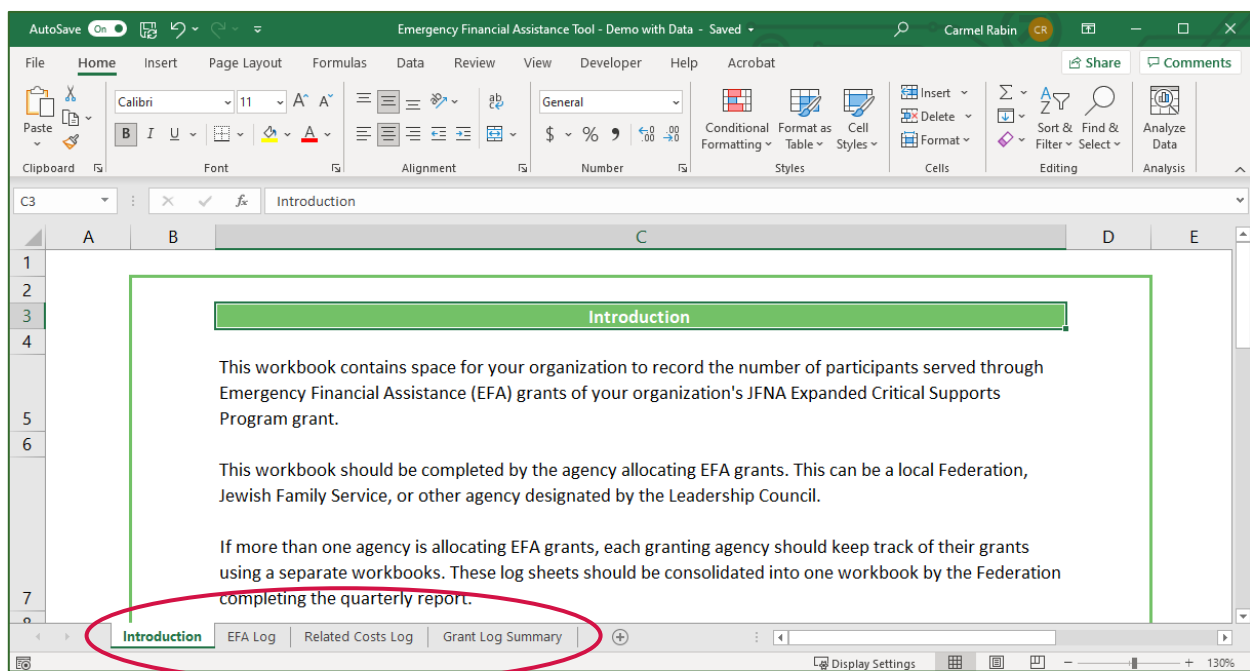
Before we get into the details of how to use the EFA Tool, let's go over some background information.

PURPOSE

The Emergency Financial Assistance (EFA) Tool enables subgrantees of the Expanded Critical Supports Program to record the number and type of participants served through EFA grants. This tool complements the [Program Participant Report](#), which records the number and type of participants served through activities of the Expanded Critical Supports Program. Information recorded through the EFA Tool enables The JFNA Center on Aging and Trauma to report to funders the number and type of participants served through EFA grants. This tool provides transparency in EFA spending and allows the Center and its subgrantees to learn about EFA trends.

STRUCTURE

The EFA Tool is housed in an Excel workbook composed of four worksheets, detailed below.



The worksheets include the following:

1. **Introduction.** The first worksheet of the workbook is broken into two sections. The first section includes a brief introduction to the workbook and highlights useful materials such as Emergency Financial Assistance Definitions, this EFA Training Guide, the Participant ID Generator, and the Program Participant Report.
2. **EFA Log.** The second worksheet of the workbook provides space to record each emergency financial assistance grant provided to a unique program participant. Further information about the EFA Log worksheet is detailed in [Section 3](#) of this training guide.
3. **Related Cost Log.** The third worksheet of the workbook provides space to record each case of costs related to emergency financial assistance that cannot be entered into the EFA log as they are associated with multiple individuals. Further information about the Related Cost Log worksheet is detailed in [Section 4](#) of this training guide.
4. **Grant Log Summary.** The fourth worksheet of the workbook provides an *automatically generated* summary of your organization's emergency financial assistance grants (both from the EFA Log and Related Cost Log). Further information about the Grant Log Summary worksheet is detailed in [Section 6](#) of this training guide.

USE, REVIEW, AND SUBMISSION

Data is entered into the EFA Tool by the organization responsible for providing EFA grants. This organization can be a local Federation, Jewish Family Service, or other agency designated by the Leadership Council to grant emergency financial assistance. If more than one agency is administering EFA grants, each granting agency should maintain their own log sheets through their own EFA Tool.

Regardless of who administers EFA grants and logs EFA entries, the Federation is responsible for reviewing the EFA Tool and submitting it through the Program Participant Report. If more than one agency is administering EFA grants, each granting agency should maintain their own log sheets through their own EFA Tool. If more than one agency is administering EFA grants, each granting agency's EFA Tool should be consolidated into one workbook by the Federation completing the quarterly report. Information about how to consolidate entries from multiple granting organizations is provided in [Section 5](#) of this training guide.

Examples of use, review, and submission

Three examples of how the EFA Tool can be used, reviewed, and submitted are explained below. These examples are based on a local decision-making process by each Federation community in conjunction with each of their respective Leadership Councils.

- 1. Example of EFA Allocation Through One Sub-Subgrantee.** The JFNA Center provides grant funding to a subgrantee Jewish Federation, that allocates EFA funding through one sub-subgrantee agency. In this case, the sub-subgrantee agency should enter information into the EFA Tool and submit the tool to the Jewish Federation on a quarterly basis for review and submission to The JFNA Center.
- 2. Example of EFA Allocation Through Multiple Sub-Subgrantees.** The JFNA Center provides grant funding to a subgrantee Jewish Federation that allocates EFA funding through multiple sub-subgrantee agencies. In this case, each sub-subgrantee agency should enter information into their own EFA Tool. Each sub-subgrantee agency will submit their EFA tool to their Jewish Federation on a quarterly basis for consolidation, review, and submission to The JFNA Center.
- 3. Example of EFA Allocation Through the Jewish Federation.** The JFNA Center provides grant funding to a subgrantee Jewish Federation that allocates EFA funding themselves. In this case, the Jewish Federation will enter information into the EFA Tool, as well as reviewing and submitting it to The JFNA Center on a quarterly basis.

ACCESSING THE EFA TOOL

The EFA Tool and corresponding list of Emergency Financial Assistance Definitions can be found in the Expanded Critical Supports Programs forms [library](#). Additionally, the EFA Tool can be downloaded directly [here](#), and the corresponding list of Emergency Financial Assistance Definitions can be downloaded directly [here](#). If you have any difficulties downloading the EFA Tool and Emergency Financial Assistance Definitions through the links provided, these documents can be emailed as attachments.

2. OPEN AND SAVE

Now that we have covered the basics of what the EFA Tool is and who will use it, you are ready to open the EFA Tool file and save it to your workspace.

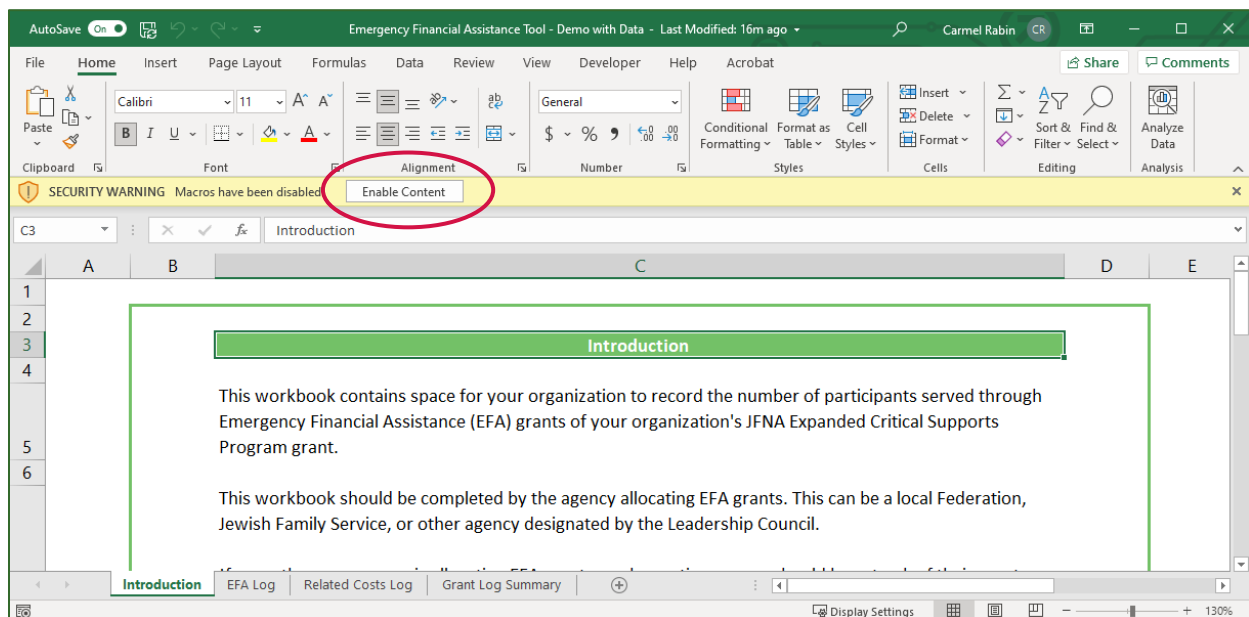
OPENING AND ENABLING CONTENT

When opening the EFA Tool, you will need to enable the Excel workbook content to access all features of the EFA Tool. To do so, you have two options.

Option 1: When opening the EFA Tool workbook, a yellow ribbon will appear at the top of the Excel window. Depending on your version of Excel, this ribbon will appear similarly as shown in the picture below.

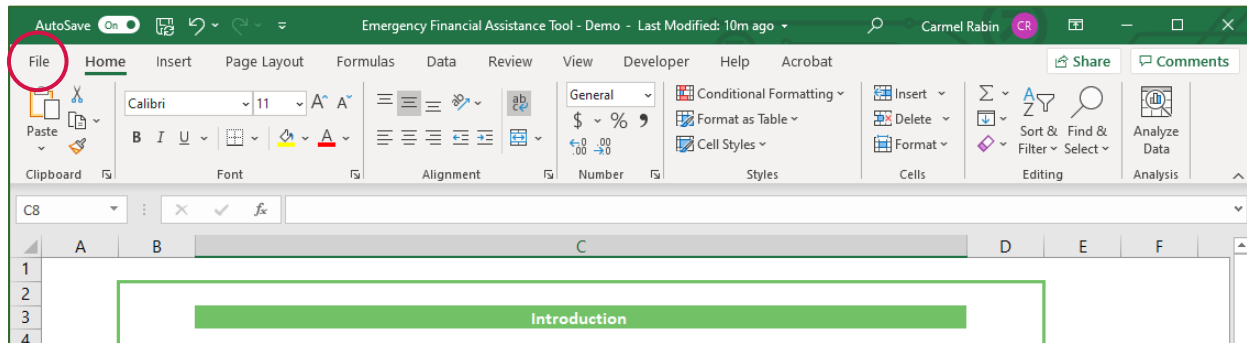
- ✓ **Step 1.** Click **'Enable Content'** on the yellow ribbon. This will allow your Excel document to use pre-set coding that automatically generates the Grant Log Summary.

If you have clicked out of the yellow ribbon without enabling content, close the document and open it again. The yellow ribbon will appear again and prompt you to enable content.

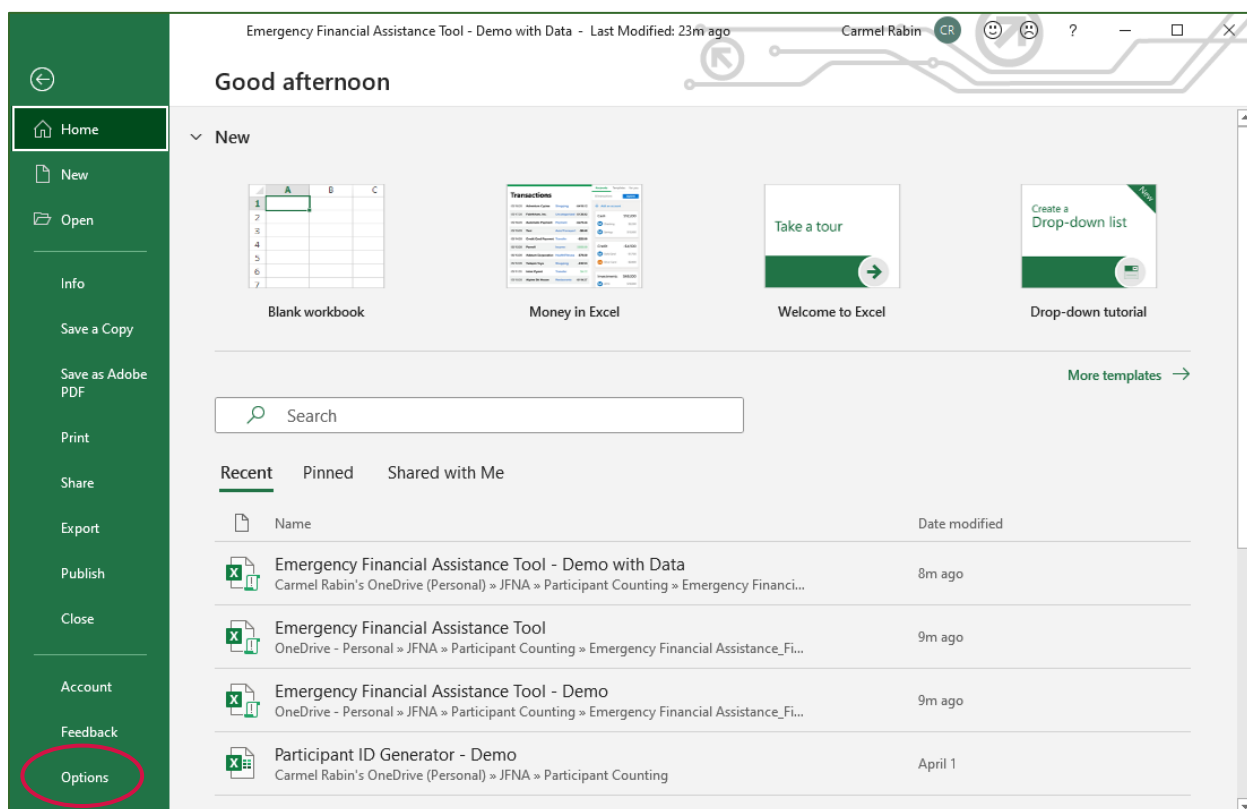


Option 2. If the yellow ribbon does not appear, follow the instructions below.

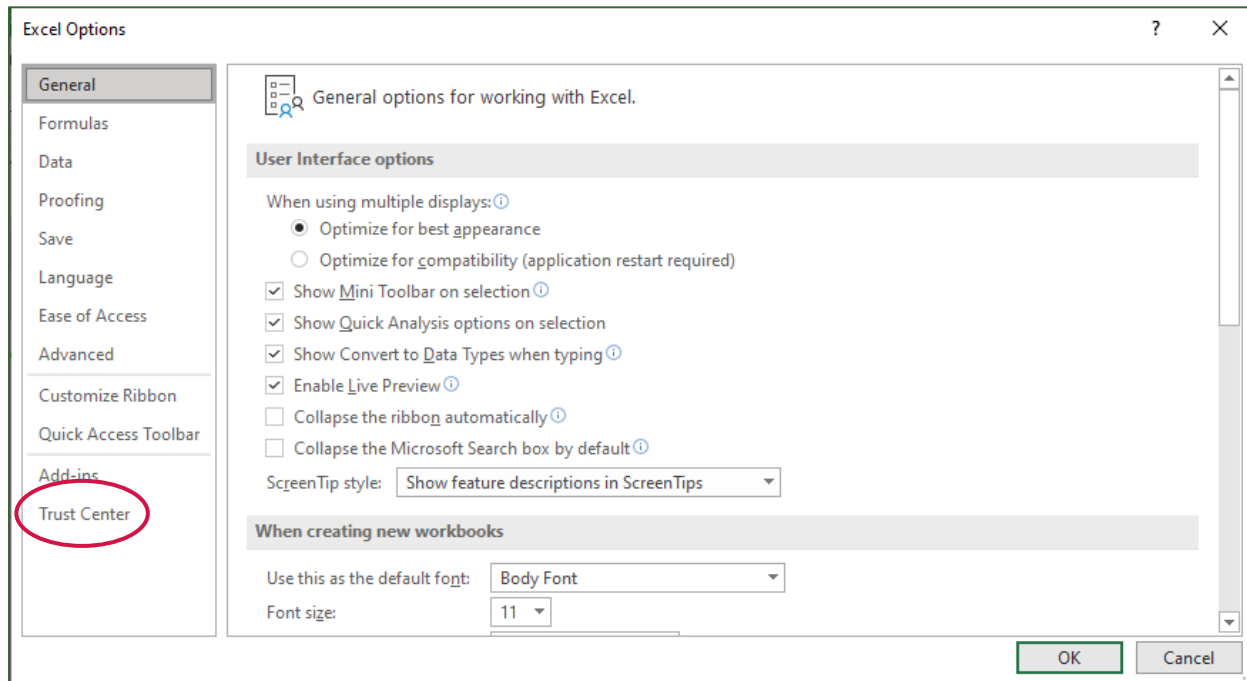
- ✓ **Step 1.** Click **'File'** in the top ribbon of the Excel window.



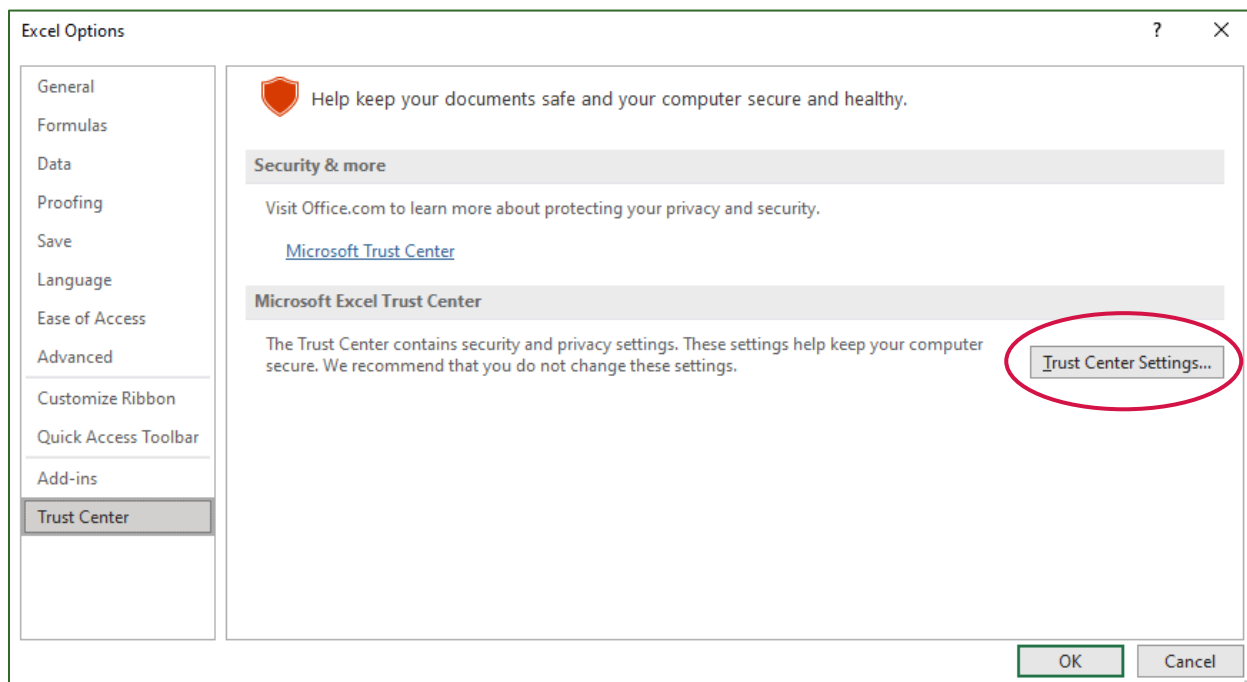
- ✓ **Step 2.** Click **'Options'**. This will open a dialogue box.



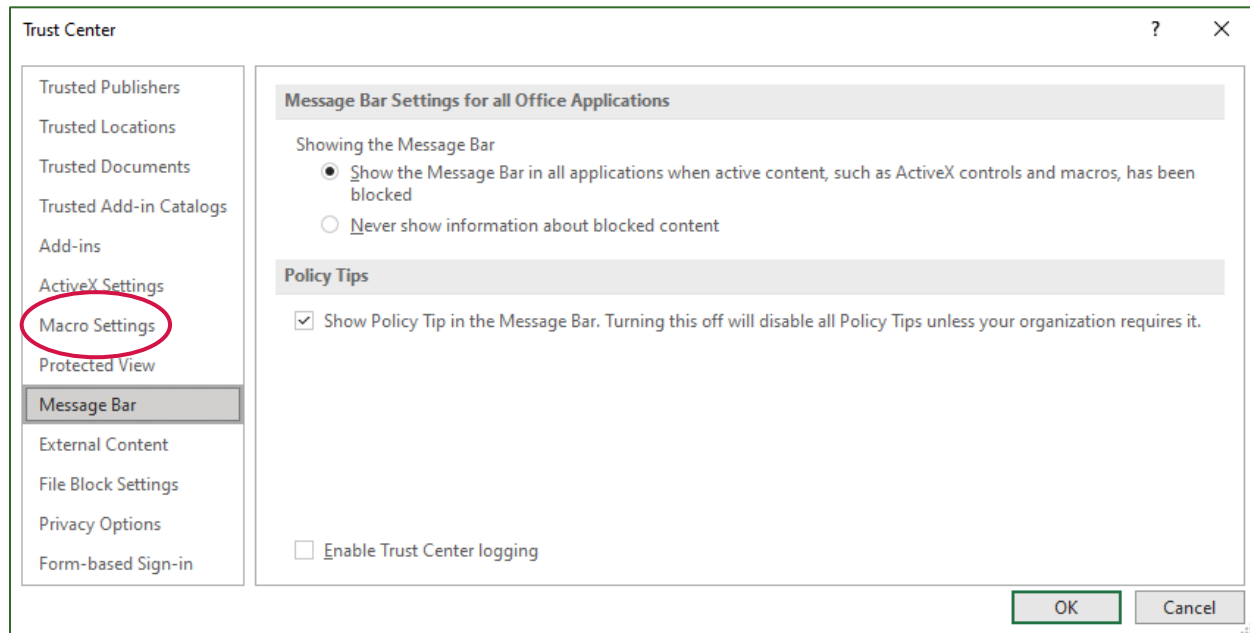
✓ Step 3. Click 'Trust Center'.



✓ Step 4. Click 'Trust Center Settings'. This will open another dialogue box.

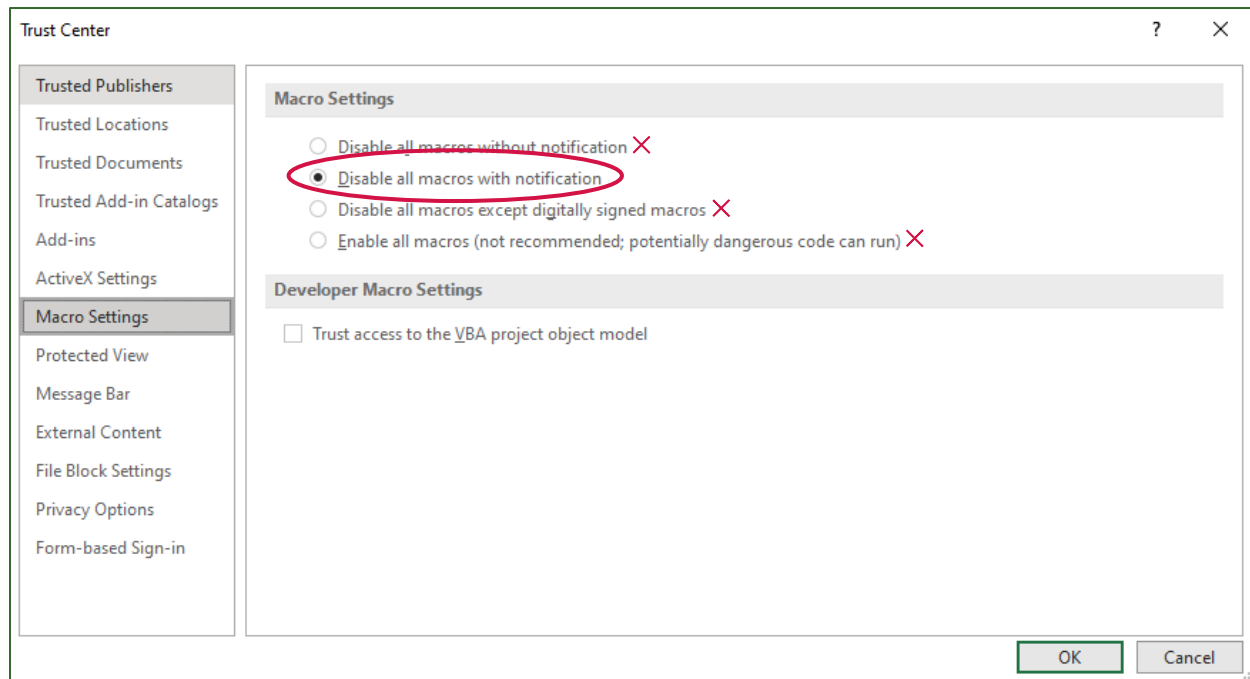


- ✓ Step 5. Click 'Macro Settings'.

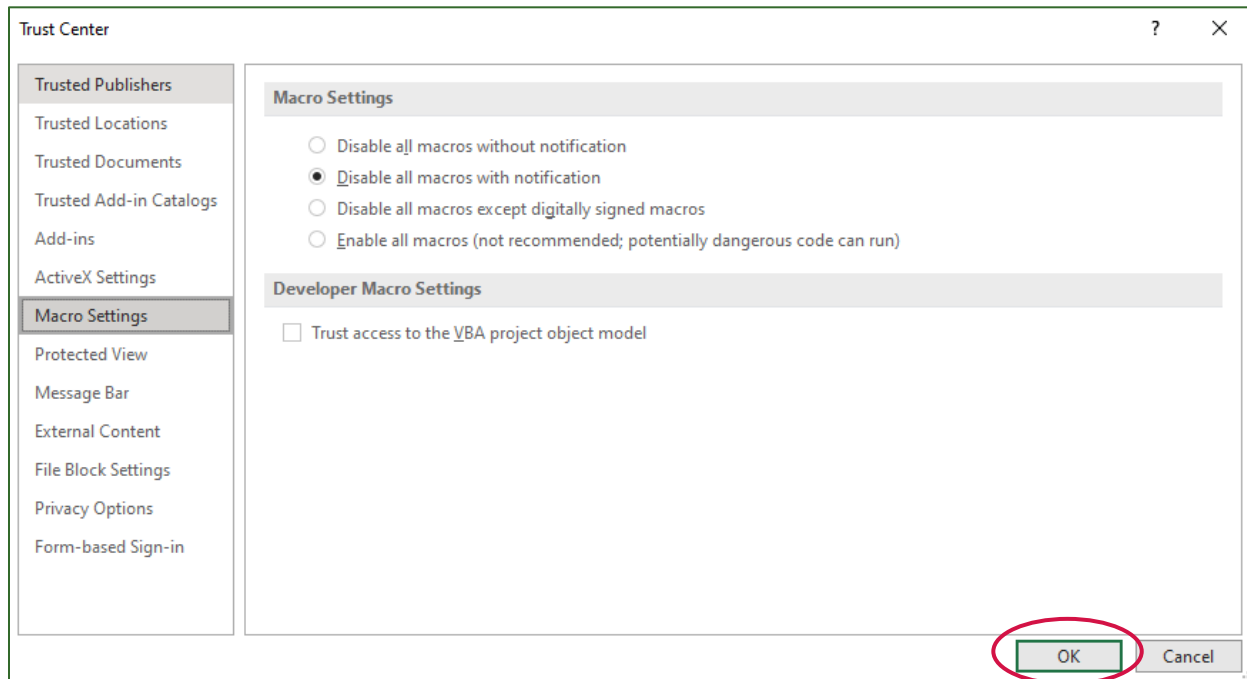


- ✓ Step 6. Click 'Disable all macros with notification'.

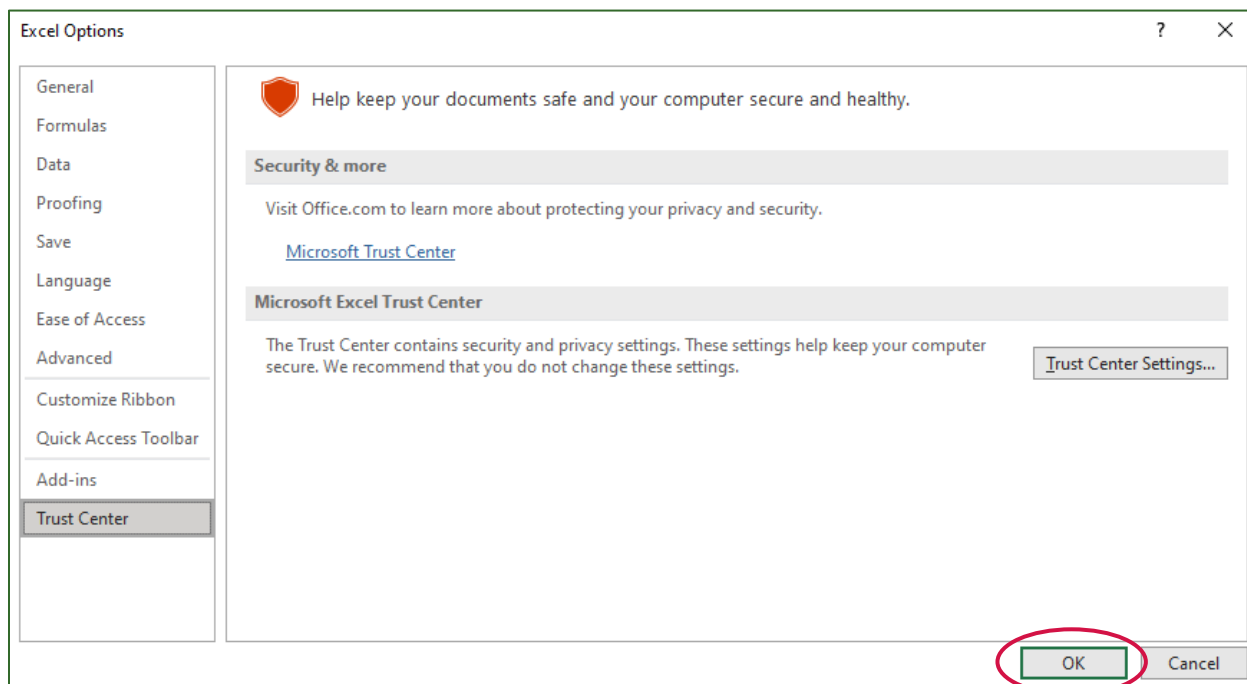
✗ It is important to avoid selection of 'Enable all macros' as this makes your computer vulnerable to viruses and malicious attachments.



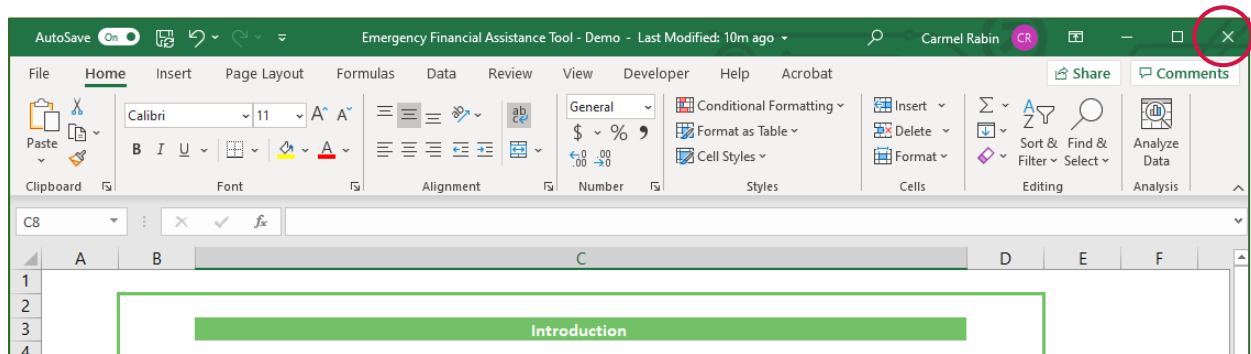
- ✓ **Step 7.** Click **'Okay'**. This will close the Trust Center dialogue box.



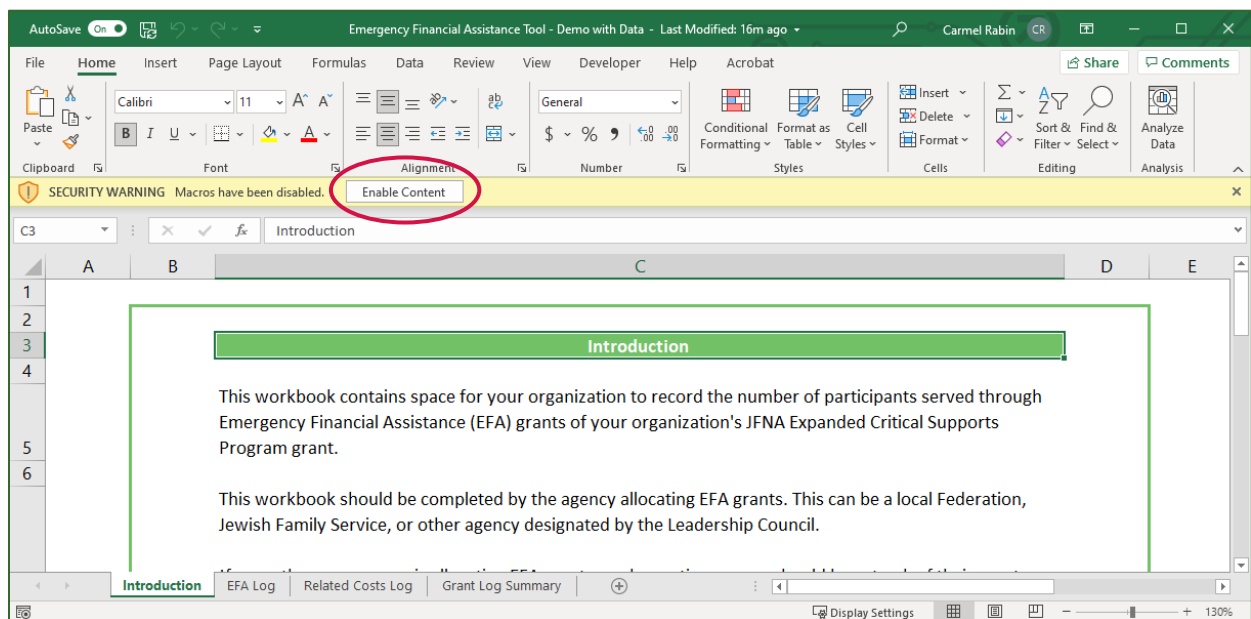
- ✓ **Step 8.** Click **'Okay'**. This will close the Excel Options dialogue box.



- ✓ **Step 9.** Close the Excel file, which will enable the program to retain the setting change.



- ✓ **Step 10.** Reopen the Excel file and click '**Enable Content**' on the yellow ribbon.



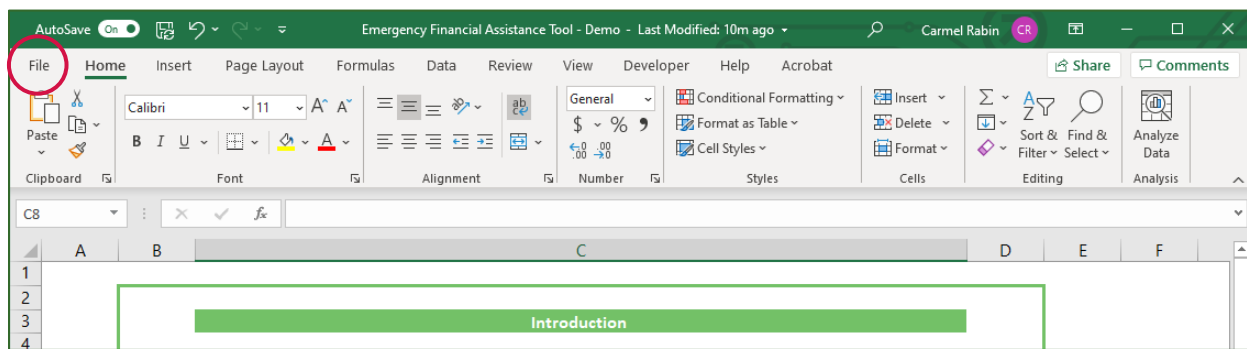
Why is it important to enable content?

The EFA Tool has been built using a 'Macro', which enables the user to edit the document. Without enabling content, you will not be able to use the Grant Log Summary worksheet.

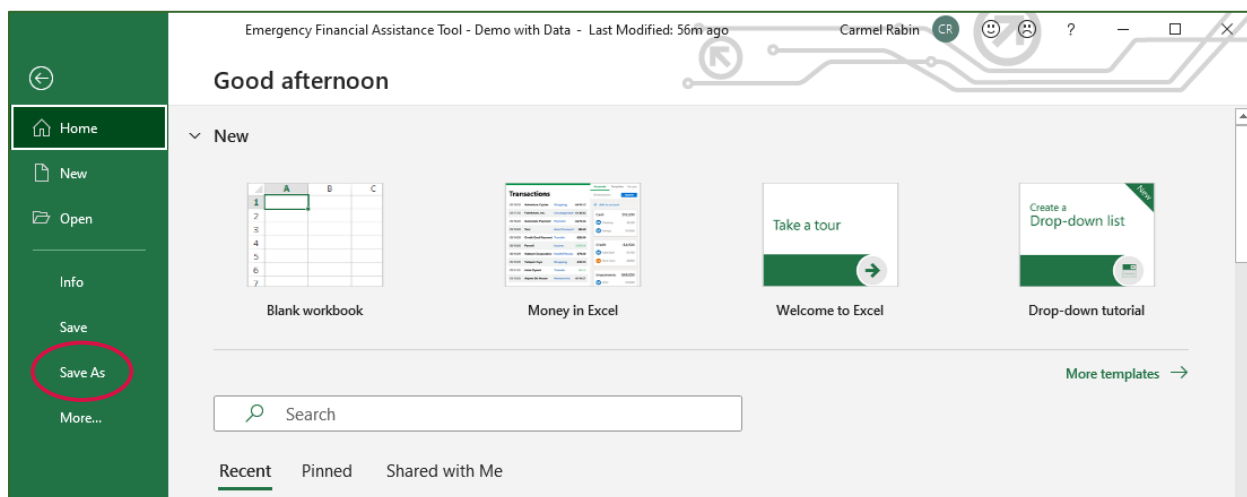
SAVING THE WORKBOOK

When saving the Excel Workbook, keep in mind that you will use the same workbook over the course of the grant. Save the workbook in a safe and reliable location where you will be able to continuously edit the workbook with new grant entries. Also, consider routinely backing up copies of the file to avoid loss of data. Avoid saving the file on your desktop as it may be harder to recover desktop files if your computer experiences hardware failure. When saving the file for the first time, follow the instructions detailed and pictured below:

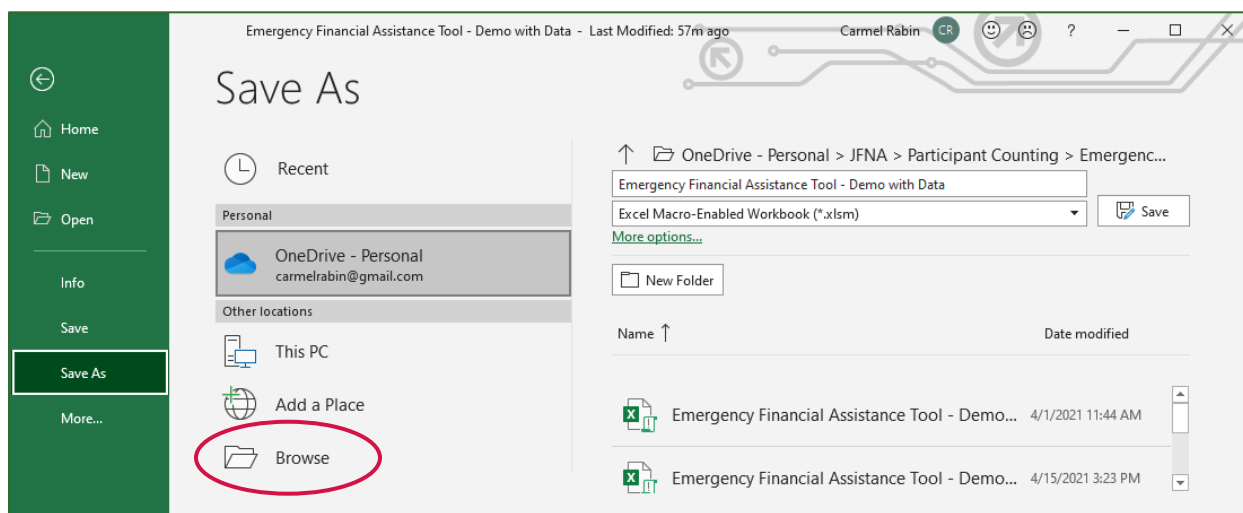
- ✓ **Step 1.** Click **'File'** in the top ribbon of Excel.



- ✓ **Step 2.** Click **'Save As'**. For some Excel users this option may appear as **'Save a Copy'**.

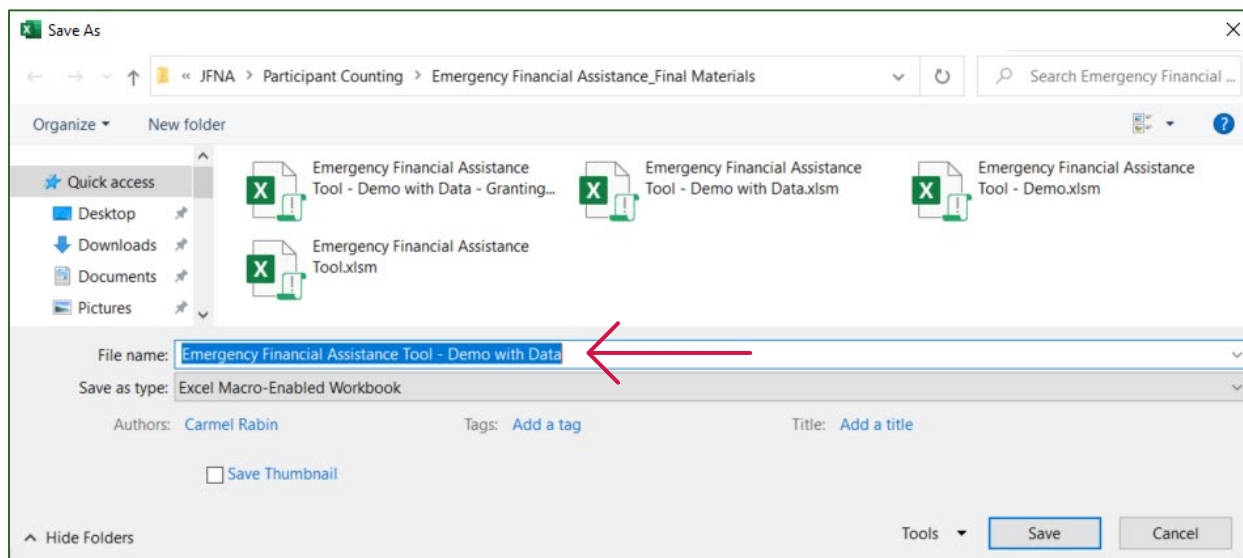


- ✓ **Step 3. Browse** your computer and select a location to save the file.



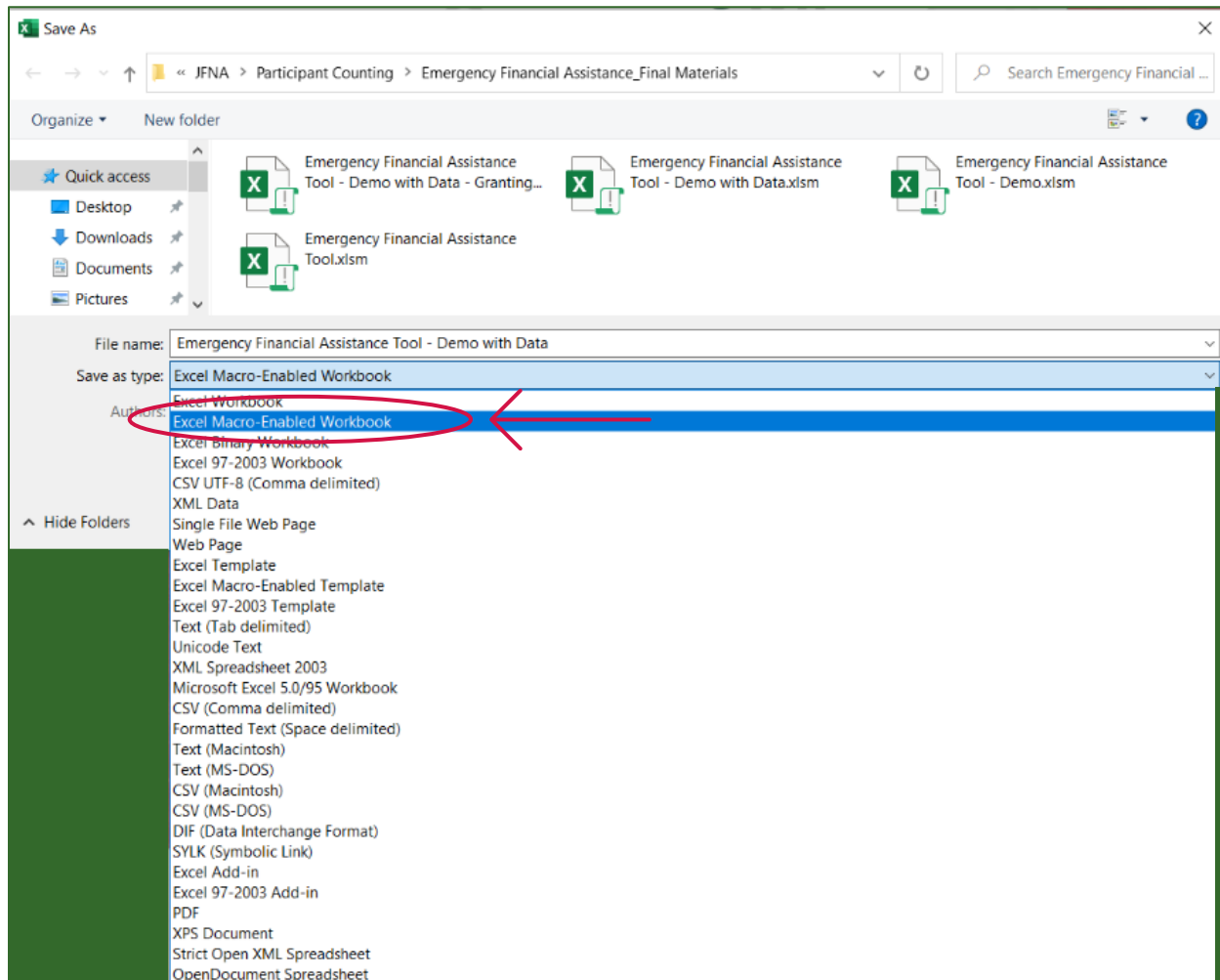
- ✓ **Step 4. Name your file under 'File Name:' field.**

For example, you could name your file 'EFA Tool_Organization Name' so you can easily find the file later. You may use the same file throughout the grant program or use the 'Save As' function to create a new file each quarter based on the previous file.



- ✓ **Step 5.** Save your file as an **‘Excel Macro-Enabled Workbook’** under **‘Save As Type:’**

This file type should be pre-selected. If it does not automatically appear, select ‘Excel Macro-Enabled Workbook’ from the drop-down menu. Do not save this Excel Workbook as an ‘Excel Macro-Enabled Template’, ‘Excel Workbook’, or CSV file.



- ✓ **Step 6.** Click **‘Save’** which will close the dialogue box.

Why is it important to save the file as an ‘Excel Macro-Enabled Workbook’?

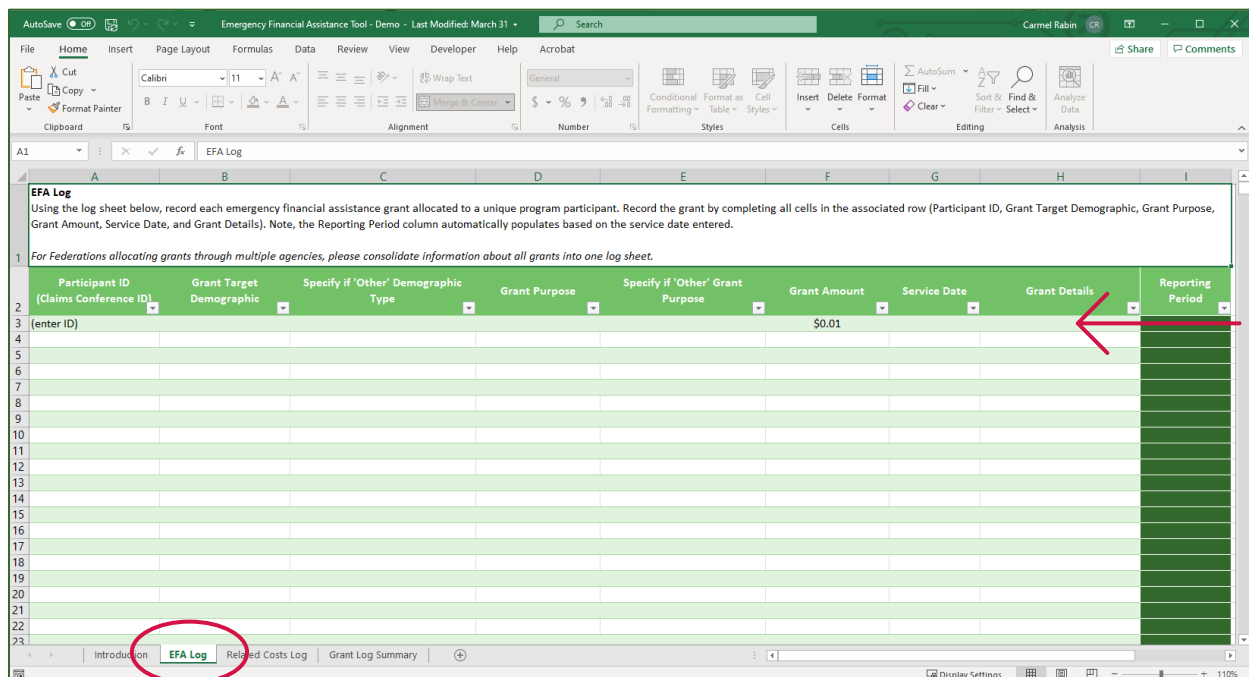
When saving, be sure to save the file as an Excel Macro-Enabled Workbook so that the workbook generates the totals in the Grant Log Summary.

3. EFA LOG

Now that you have successfully opened and saved your EFA Tool, you are ready to start entering data into the EFA Log Sheet.

ENTERING GRANT DATA

The EFA Log Sheet provides space to record grants allocated to individual participants for critical supports to prevent emergencies and homelessness. Grants recorded in this log are allocated to unique individual participants. Examples can include the installation of safety rails, replacement of a boiler, medication coverage, or utility payment for a specific participant. This part of the workbook most closely resembles the Diamond reporting system administered by the Claims Conference, as it records grant instances by participant ID, grant amount, grant type, and service date. When the EFA Log is opened for the first time, it will appear blank as shown in the image below. Simply overwrite row 3 with the first details of your first EFA grant.



When entering data, each grant provided to a unique program participant will be entered in its own row. Since participants may receive multiple grants, it is important to note that for each EFA grant allocated to a participant there will be a corresponding EFA Log entry.

A complete row of logged data includes: Participant ID, Grant Target Demographic, Grant Purpose, Grant Amount, Service Date, and Grant Details. An example of a completed EFA Log is shown below.

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
815634	Holocaust survivors		Appliance Repair and Replacement		\$2,000.00	1/3/2021	new washing machine	2021-Q1
527224	Holocaust survivors		Case Management		\$212.45	2/15/2021		2021-Q1
916534	Asian American older adults		Dental Assistance		\$1,348.54	3/5/2021		2021-Q1
621988	Family caregivers of older adults		Caregiving		\$200.00	3/6/2021		2021-Q1
852243	Other	Pacific Islander older adults	Funeral and Burial Expenses		\$5,000.00	2/27/2021		2021-Q1
130408	Veteran older adults		Household and Personal Care Supplies		\$60.00	4/29/2021		2021-Q2
511631	Immigrant or refugee older adults		Food Assistance		\$150.00	4/1/2021		2021-Q2
928719	First Responder older adults		Food Assistance		\$54.00	7/15/2021		2021-Q3
296310	LGBTQ older adults		Utility Repair and Replacement		\$2,500.00	9/28/2021	HVAC repair	2021-Q3
187844	Older adult domestic or sexual violence survivors		Transportation		\$12.68	12/31/2021	ride share to hospital	2021-Q4
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
527224	Holocaust survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
527224	Holocaust survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
527224	Holocaust survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
815634	Holocaust survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4

PARTICIPANT ID

The Participant ID column is completed by manually entering a series of letters and/or numbers that distinguish unique program participants. EFA grants allocated to the same participant should be logged under the same Participant ID. Since participants may receive multiple grants, the same Participant ID may appear multiple times throughout the Participant ID column of the EFA Log.

How do you determine the Participant ID? A Participant ID can be drawn from four sources:

1. **Claims Conference ID.** If your grant participants are Holocaust survivors who receive funding from the Claims Conference, they will have a Claims Conference ID used for the Diamond data collection system. If you have access to participants' Claims Conference ID, you may use this to complete the Participant ID column.
2. **Case Management ID.** If your grant participants are registered through your organization's case management system, they will likely have a case management ID associated with their name. If you have access to participants' case management ID, you may use this to complete the Participant ID column.



- 3. Participant ID Generator ID.** If your participants have neither a Claims Conference ID nor a case management ID, you may create a new and unique participant ID system. See [Appendix I](#) for instructions on how to create a unique participant ID using the Participant ID Generator Tool.
- 4. Combination of IDs.** Some organizations may not have one participant ID system that records all program participants. For example, some participants may have a Claims Conference ID and others may have a Case Management ID. In such cases, a combination of ID types can be used to complete the Participant ID column. However, if combining IDs from multiple systems, please ensure there is no overlap in IDs across systems.

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A17 ✖ ✓ fx 815634

EFA Log

Using the log sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing Amount, Service Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

	Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose
2					
3	815634				
4	527224				
5	916534				
6	621988				
7	852243				
8	130408				
9	511631				
10	928719				
11	296310				
12	187844				
13	815634				
14	527224				
15	527224				
16	527224				
17	815634				
18					
19					
20					
21					
22					
23					

Participant ID
Write unique participant ID

Introduction **EFA Log** Related Costs Log Grant Log Summary ⊕

GRANT TARGET DEMOGRAPHIC

The Grant Target Demographic column is completed by selecting a demographic from the drop-down menu pictured below. If a grant is provided to a target demographic not listed in the drop-down menu, select the 'Other' option at the bottom of the menu. Then complete the column to the right – 'Specify if 'Other' Demographic Type'.

What is a Grant Target Demographic?

The grant target demographic is the intended audience of the emergency financial assistance. This can include Holocaust survivors, family caregivers, and additional populations of older adults with a history of trauma.

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Clipboard Font Alignment Number Styles

B17 Holocaust survivors

EFA Log

Using the log sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing all cells in the sheet (Amount, Service Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount
815634	Holocaust survivors				
527224	Holocaust survivors				
916534	Asian American older adults				
627988	Family caregivers of older adults				
857243	Other Pacific Islander older adults				
130408	Veteran older adults				
517631	Immigrant or refugee older adults				
928719	First Responder older adults				
296310	LGBTQ older adults				
187844	Older adult domestic or sexual violence survivors				
815634	Holocaust survivors				
527224	Holocaust survivors				
527224	Holocaust survivors				
527224	Holocaust survivors				
815634	Holocaust survivors				
	Immigrant or refugee older adults				
	Latin American older adults				
	LGBTQ older adults				
	American Indian, Alaska Native, Older adult crime survivors				
	Older adult disaster survivors				
	Older adult domestic or sexual violence survivors				

Introduction EFA Log Related Costs Log Grant Log Summary

Note: if an option is typed into the cell which does not appear in the drop-down menu, an error message will appear prompting a selection from the menu, as shown in the image below.

EFA Log
Using the log sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing Amount, Service Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose
815634	Holocaust survivors			
527224	Holocaust survivors			
916534	Asian American older adults			
621988	Family caregivers of older adults			
852243	Other	Pacific Islander older adults		
130408	Veteran older adults			
511631	Immigrant or refugee older adults			
928719	First Responder older adults			
296310	LGBTQ older adults			
187844	Older adult domestic or sexual violence survivors			
815634	Holocaust survivors			
527224	Holocaust survivors			
527224	Holocaust survivors			
527224	Holocaust survivors			
815634	text			

Demographics
Select from drop-down menu

Microsoft Excel
Please select an option from the drop-down menu.
Retry Cancel Help

GRANT PURPOSE

The Grant Purpose column is completed by selecting a purpose from the drop-down menu pictured below. If a grant purpose is not listed in the drop-down menu, select the 'Other' option at the bottom of the menu. Then complete the column to the right – 'Specify if 'Other' Grant Purpose'.



What is a Grant Purpose?

The grant purpose includes various categories of emergency financial assistance service provision. This includes categories such as appliance repair or replacement, food assistance, housing modifications, transportation, and more. For a full list of grant categories and coverage details, please see the [Emergency Financial Assistance Definitions](#).

AutoSave On Emergency Financial Assistance Tool - Demo with Data - Saved Search

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Clipboard Font Alignment Number Conditional Formatting

D17 Housing Repairs

EFA Log
Using the log sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing Amount, Service Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

	Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose
2					
3	815634	Holocaust survivors		Appliance Repair and Rep	
4	527224	Holocaust survivors		Case Management	
5	916534	Asian American older adults		Dental Assistance	
6	621988	Family caregivers of older adults		Caregiving	
7	852243	Other Pacific Islander older adults		Funeral and Burial Expenses	
8	130408	Veteran older adults		Household and Personal Care Supplies	
9	511631	Immigrant or refugee older adults		Food Assistance	
10	928719	First Responder older adults		Food Assistance	
11	296310	LGBTQ older adults		Utility Repair and Replacement	
12	187844	Older adult domestic or sexual violence survivors		Transportation	
13	815634	Holocaust survivors		Clothing	
14	527224	Holocaust survivors		Medical Assistance	
15	527224	Holocaust survivors		Dental Assistance	
16	527224	Holocaust survivors		Housing Assistance	
17	815634	Holocaust survivors		Housing Repairs	
18				Housing Repairs	
19				Legal Costs	
20				Medical Assistance	
21				Pet Care	
22				Translation and Interpretation	
23				Transportation	
				Utility Assistance	
				Utility Repair and Replacement	

Introduction EFA Log Related Costs Log Grant Log Summary

Ready

Note: if an option is typed into the cell which does not appear in the drop-down menu, an error message will appear prompting a selection from the menu, as shown in the image below.

Emergency Financial Assistance Tool - Demo with Data - Saved

Insert Page Layout Formulas Data Review View Developer Help Acrobat Table Design

Calibri 11 A⁺ A⁻ B I U Font Alignment Number Styles

Sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing all cells in the associated row (Grant ID, Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant ID (reference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount
815634	Holocaust survivors		Appliance Repair and Rep		
527224	Holocaust survivors		Case Management		
916534	Asian American older adults		Dental Assistance		
621988	Family caregivers of older adults		Caregiving		
852243	Other	Pacific Islander older adults	Funeral and Burial Expenses		
130408	Veteran older adults		Household and Personal Care Supplies		
511631	Immigrant or refugee older adults		Food Assistance		
928719	First Responder older adults		Food Assistance		
296310	LGBTQ older adults		Utility Repair and Replacement		
187844	Older adult domestic or sexual violence survivors		Transportation		
815634	Holocaust survivors		Clothing		
527224	Holocaust survivors		Medical Assistance		
527224	Holocaust survivors		Dental Assistance		
527224	Holocaust survivors		Housing Assistance		
815634	Holocaust survivors		text		

Microsoft Excel

Please select an option from the drop-down menu.

Retry Cancel Help

Grant Purpose
Select from drop-down menu

roduction EFA Log Related Costs Log Grant Log Summary

(continued on the next page)



GRANT AMOUNT

The Grant Amount column is manually completed by entering a financial amount greater than \$0.00.

ed to a unique program participant. Record the grant by completing all cells in the associated row (Participant ID, Grant Target Demographic, Grant Purpose, Grant automatically populates based on the service date entered.

information about all grants into one log sheet.

Grant Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
	Appliance Repair and Rep		\$2,000.00			
	Case Management		\$212.45			
	Dental Assistance		\$1,348.54			
	Caregiving		\$200.00			
	Funeral and Burial Expenses		\$5,000.00			
	Household and Personal Care Supplies		\$60.00			
	Food Assistance		\$150.00			
	Food Assistance		\$54.00			
	Utility Repair and Replacement		\$2,500.00			
	Transportation		\$12.68			
	Clothing		\$124.35			
	Medical Assistance		\$65.00			
	Dental Assistance		\$612.95			
	Housing Assistance		\$245.13			
	Housing Repairs		\$3,000.00			

Grant Amount
Write in grant amount greater than \$0.00

(continued on the next page)

Note: if a grant amount less than or equal to \$0.00 is typed into the cell, an error message will appear prompting a selection of a grant amount greater than \$0.00, as shown on the following page.

The screenshot shows an Excel spreadsheet with a table for grant data. The columns are: Grant Type, Grant Purpose, Specify if 'Other' Grant Purpose, Grant Amount, Service Date, Grant Details, and Reporting Period. The 'Grant Amount' column contains various values, with the last one, 0.00, circled in red. A red arrow points from this cell to a Microsoft Excel error dialog box that says "Enter a grant value greater than \$0.00." with buttons for "Retry", "Cancel", and "Help". A yellow tooltip also points to the 0.00 cell, stating "Grant Amount Write in grant amount greater than \$0.00".

Grant Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
	Appliance Repair and Rep		\$2,000.00			
	Case Management		\$212.45			
	Dental Assistance		\$1,348.54			
	Caregiving		\$200.00			
	Funeral and Burial Expenses		\$5,000.00			
	Household and Personal Care Supplies		\$60.00			
	Food Assistance		\$150.00			
	Food Assistance		\$54.00			
	Utility Repair and Replacement		\$2,500.00			
	Transportation		\$12.68			
	Clothing		\$124.35			
	Medical Assistance		\$65.00			
	Dental Assistance		\$612.95			
	Housing Assistance		\$245.13			
	Housing Repairs		0.00			

(continued on the next page)

SERVICE DATE

The Service Date column is manually completed by entering a date in the order of MM/DD/YYYY which is past the date of 12/31/2020.

Do log entries have to be entered in chronological order?

No, since the Grant Log Summary sorts the data based on service date, there is no need to reorganize the EFA Log as it is entered. Each entry should be completed in the next available row.

ted to a unique program participant. Record the grant by completing all cells in the associated row (Participant ID, Grant Target Demographic, Grant Purpose, Grant automatically populates based on the service date entered.

rmation about all grants into one log sheet.

Grant Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
	Appliance Repair and Rep		\$2,000.00	1/3/2021		
	Case Management		\$212.45	2/15/2021		
	Dental Assistance		\$1,348.54	3/5/2021		
	Caregiving		\$200.00	3/6/2021		
	Funeral and Burial Expenses		\$5,000.00	2/27/2021		
	Household and Personal Care Supplies		\$60.00	4/29/2021		
	Food Assistance		\$150.00	4/1/2021		
	Food Assistance		\$54.00	7/15/2021		
	Utility Repair and Replacement		\$2,500.00	9/28/2021		
	Transportation		\$12.68	12/31/2021		
	Clothing		\$124.35	2/13/2021		
	Medical Assistance		\$65.00	3/14/2021		
	Dental Assistance		\$612.95	6/20/2021		
	Housing Assistance		\$245.13	9/25/2021		
	Housing Repairs		\$3,000.00	10/1/2021		

Service Date
MM/DD/YYYY

Note: if a date prior to 2021 is typed into the cell, an error message will appear prompting a selection of a date past 12/31/2020, as shown on the following page.

Microsoft Excel

This value doesn't match the data validation restrictions defined for this cell.

Service Date
MM/DD/YYYY

Grant Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
	Appliance Repair and Rep		\$2,000.00	1/3/2021		
	Case Management		\$212.45	2/15/2021		
	Dental Assistance		\$1,348.54	3/5/2021		
	Caregiving		\$200.00	3/6/2021		
	Funeral and Burial Expenses		\$5,000.00	2/27/2021		
	Household and Personal Care Supplies		\$60.00	4/29/2021		
	Food Assistance		\$150.00	4/1/2021		
	Food Assistance		\$54.00	7/15/2021		
	Utility Repair and Replacement		\$2,500.00	9/28/2021		
	Transportation		\$12.68	12/31/2021		
	Clothing		\$124.35	2/13/2021		
	Medical Assistance		\$65.00	3/14/2021		
	Dental Assistance		\$612.95	6/20/2021		
	Housing Assistance		\$245.13	9/25/2021		
	Housing Assistance			10/1/2020		

(continued on the next page)

GRANT DETAILS

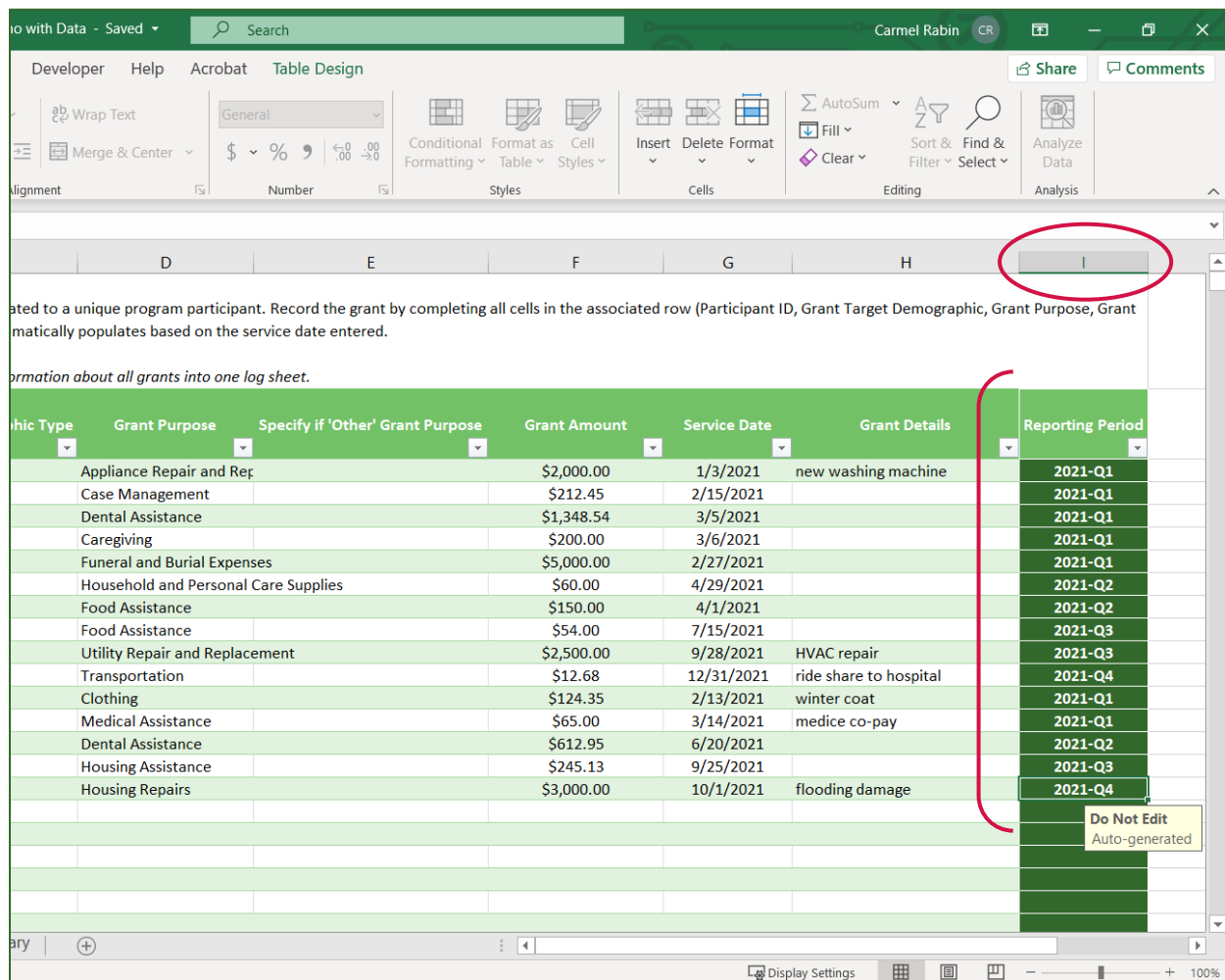
The Grant Details column is manually completed by adding a description of the grant funding provided. This column provides space for granting organizations to write notes about the grant use. The use of this column is not required but provides additional space for note keeping.

[illegible]

(continued on the next page)

REPORTING PERIOD

Based on the data entered in the Service Date column, the Reporting Period cell automatically generates the corresponding reporting period. If the reporting period appears incorrectly, go back to the service date, and confirm the accuracy of the data entry.



Grant Purpose	Service Date	Reporting Period
Appliance Repair and Replacement	1/3/2021	2021-Q1
Case Management	2/15/2021	2021-Q1
Dental Assistance	3/5/2021	2021-Q1
Caregiving	3/6/2021	2021-Q1
Funeral and Burial Expenses	2/27/2021	2021-Q1
Household and Personal Care Supplies	4/29/2021	2021-Q2
Food Assistance	4/1/2021	2021-Q2
Food Assistance	7/15/2021	2021-Q3
Utility Repair and Replacement	9/28/2021	2021-Q3
Transportation	12/31/2021	2021-Q4
Clothing	2/13/2021	2021-Q1
Medical Assistance	3/14/2021	2021-Q1
Dental Assistance	6/20/2021	2021-Q2
Housing Assistance	9/25/2021	2021-Q3
Housing Repairs	10/1/2021	2021-Q4

(continued on the next page)

Note: manual edits of this column are not possible and will result in an error message. This column is password protected to prevent mistakes, as shown on the following page.

The screenshot shows an Excel spreadsheet titled "ow with Data - Saved". The ribbon includes "Developer", "Help", "Acrobat", and "Table Design". The "Table Design" ribbon is active, showing options like "Wrap Text", "Merge & Center", "General", "Conditional Formatting", "Format as Table", "Cell Styles", "Insert", "Delete", "Format", "AutoSum", "Fill", "Clear", "Sort & Filter", "Find & Select", and "Analyze Data".

The spreadsheet contains a table with the following columns: "Grant Type", "Grant Purpose", "Specify if 'Other' Grant Purpose", "Grant Amount", "Service Date", "Grant Details", and "Reporting Period". The "Reporting Period" column is highlighted in green and contains values like "2021-Q1", "2021-Q2", "2021-Q3", and "2021-Q4".

An error message box is displayed over the "Reporting Period" column, stating: "A cell you are trying to change is password protected. Enter the password to change this cell:". The message box has "OK" and "Cancel" buttons. A red arrow points from the error message to the "Reporting Period" column, which is labeled "Do Not Edit Auto-generated".

Grant Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
	Appliance Repair and Rep		\$2,000.00	1/3/2021	new washing machine	2021-Q1
	Case Management		\$212.45	2/15/2021		2021-Q1
	Dental Assistance		\$1,348.54	3/5/2021		2021-Q1
	Caregiving		\$200.00	3/6/2021		2021-Q1
	Funeral and Burial Expenses		\$5,000.00	2/27/2021		2021-Q1
	Household and Personal Care Supplies		\$60.00	4/29/2021		2021-Q2
	Food Assistance		\$150.00	4/1/2021		2021-Q2
	Food Assistance		\$54.00	7/15/2021		2021-Q3
	Utility Repair and Replacement		\$2,500.00	9/28/2021	HVAC repair	2021-Q3
	Transportation		\$12.68	12/31/2021	ride share to hospital	2021-Q4
	Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
	Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
	Dental Assistance		\$6			2021-Q2
	Housing Assistance		\$2			2021-Q3
	Housing Repairs		\$3			2021-Q4

4. RELATED COST LOG

As you enter data into the EFA Log, you may notice that a few entries do not fit. This may mean that you can use the Related Cost Log to enter some grant data.

ENTERING GRANT DATA

The Related Cost Log provides space to record all costs related to emergency financial assistance that cannot be entered into the EFA log and should rarely be used. While the majority of EFA costs should be recorded directly in the EFA log, this log provides organizations with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of multiple documents/flyers, or group transportation for which the cost cannot be distributed to unique participants. This does not include staff salaries or other regular program administration expenses.

When the Related Cost Log is opened for the first time, it will appear blank as shown in the image below. Simply overwrite row 3 with the first details of the first Related Cost grant.

Related Costs Log

Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

	Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
2							
3	(enter purpose)				\$0.01		
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							

When entering data, each grant provided for a specific purpose will be entered in its own row. A complete row of logged data includes: Grant Purpose, Number of Participant Served, Grant Target Demographic, Grant Amount, and Service Date.

Related Costs Log
Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
translation of 10 documents	50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
group transportation	22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
congregate meal	12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

(continued on the next page)

GRANT PURPOSE

The Grant Purpose column is completed by manually writing in a brief description of the grant use as pictured below. Since the Related Cost Log captures costs that may not easily fit into the EFA Log, the Grant Purpose column is not limited to a drop-down menu. Instead, it relies on a manual entry of a grant description. Please enter the grant purpose manually. Grant purposes may include, for example, translation of EFA marketing materials into Russian, group transportation for emergency services.

Related Costs Log

Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that costs recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a quarterly budget reporting. For example, this can include a congregational meal, translation of group documents, or group transportation for which the cost of this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount
translation of 10 documents	50	Holocaust survivors		\$250.64
group transportation	22	Immigrant or refugee older adults		\$175.00
congregational meal	12	Older adults with disabilities		\$125.45
congregational meal	50	Older adult crime survivors		\$1,000.00
group transportation	17	Older adult crime survivors		\$500.00

Grant Purpose Write in grant purpose

(continued on the next page)

NUMBER OF PARTICIPANTS SERVED

The column of Number of Participants Served is completed by manually entering a number greater than 1 as pictured below. This number represents the number of program participants who directly benefit from this grant.

Related Costs Log

Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that costs recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost of this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount
translation of 10 documents	50	Holocaust survivors		\$250.64
group transportation	22	Immigrant or refugee older adults		\$175.00
congregate meal	12	Older adults with disabilities		\$125.45
congregate meal	50	Older adult crime survivors		\$1,000.00
group transportation	17	Older adult crime survivors		\$500.00

Number of Participants
Enter number greater than 1

(continued on the next page)

Note: grants serving one individual should be entered into the EFA Log as the grant can be linked to a specific program participant. If 1 or 0 are entered into Column B, an error message will appear as shown on the next page.

Related Costs Log
Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that costs recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a quarterly budget reporting. For example, this can include a congregational meal, translation of group documents, or group transportation for which the cost of this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount
translation of 10 documents	50	Holocaust survivors		\$250.64
group transportation	22	Immigrant or refugee older adults		\$175.00
congregate meal	12	Older adults with disabilities		\$125.45
congregate meal	50	Older adult crime survivors		\$1,000.00
group transportation	1	Older adult crime survivors		\$500.00

Number of Participants
Enter number greater than 1

Microsoft Excel
Enter number greater than 1.
[Retry] [Cancel] [Help]

(continued on the next page)

GRANT TARGET DEMOGRAPHIC

Similar to the EFA Log, the Grant Target Demographic column is completed by selecting a demographic from the drop-down menu pictured below. If a grant is provided to a target demographic not listed in the drop-down menu, select the 'Other' option at the bottom of the menu. Then complete the column to the right, 'Specify if 'Other' Demographic Type'.

What is a Grant Target Demographic?

The grant target demographic is the intended audience of the emergency financial assistance. This can include Holocaust survivors, family caregivers, and additional populations of older adults with a history of trauma.

AutoSave On Emergency Financial Assistance Tool - Demo with Data - Saved

File Home Insert Page Layout Formulas Data Review View Developer Help Acrobat Table Design

Clipboard Font Alignment Number Styles Cells

C7 Older adult crime survivors

Related Costs Log

Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that costs recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost of this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount
translation of 10 documents	50	Holocaust survivors		\$250.64
group transportation	22	Immigrant or refugee older adults		\$175.00
congregate meal	12	Older adults with disabilities		\$125.45
congregate meal	50	Older adult crime survivors		\$1,000.00
group transportation	17	Older adult crime survivors		\$500.00
		Latin American older adults		
		LGBTQ older adults		
		American Indian, Alaska Native, Native Hawaiian older adults		
		Older adult crime survivors		
		Older adult disaster survivors		
		Older adult domestic or sexual violence survivors		
		Older adults with disabilities		
		Veteran older adults		

Introduction EFA Log **Related Costs Log** Grant Log Summary



Note: if an option is typed into the cell which does not appear in the drop-down menu, an error message will appear prompting a selection from the menu.

Related Costs Log

Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that costs recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost of this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

	Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount
3	translation of 10 documents		50 Holocaust survivors		\$250.64
4	group transportation		22 Immigrant or refugee older adults		\$175.00
5	congregate meal		12 Older adults with disabilities		\$125.45
6	congregate meal		50 Older adult crime survivors		\$1,000.00
7	group transportation		17 text		\$500.00
8					
9					
10					
11					
12					
13					
14					
15					
16					

Microsoft Excel
Please select an option from the drop-down menu.
Retry Cancel Help

(continued on the next page)

GRANT AMOUNT

Like the EFA Log, the Grant Amount column is manually completed by entering a financial amount greater than \$0.00.

se of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, or regular program administration expenses.

multiple agencies, please consolidate information about all grants into one log sheet.

Number of Participants Served	Grant Target Demographic	Specify if 'Other Demographic Type	Grant Amount	Service Date	Reporting Period
50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

Grant Amount
Write in grant amount greater than \$0.00

(continued on the next page)

Note: if a grant amount less than or equal to \$0.00 is typed into the cell, an error message will appear prompting a selection of a grant amount greater than \$0.00.

se of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, or regular program administration expenses.

multiple agencies, please consolidate information about all grants into one log sheet.

Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
17	Older adult crime survivors		0.00	3/15/2021	2021-Q1

Microsoft Excel
Write in number greater than \$0.00
[Retry] [Cancel] [Help]

Grant Amount
Write in grant amount greater than \$0.00

(continued on the next page)

SERVICE DATE

Like the EFA Log, the Service Date column is manually completed by entering a date in the order of MM/DD/YYYY which is past the date of 12/31/2020. If the service is provided over a range of dates, provide the first date of service provision.

Do log entries have to be entered in chronological order?

No, since the Grant Log Summary sorts the data based on service date, there is no need to reorganize the Related Cost Log as it is entered. Each entry should be completed in the next available row.

Financial Assistance Tool - Demo with Data - Saved

Search

Carmel Rabin CR

Share Comments

Data Review View Developer Help Acrobat Table Design

General

Alignment Number Styles Cells Editing Analysis

AutoSum Fill Clear Sort & Filter Find & Select Analyze Data

Wrap Text Merge & Center

Conditional Formatting Format as Table Cell Styles Insert Delete Format

B C D E F G

se of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, or regular program administration expenses.

multiple agencies, please consolidate information about all grants into one log sheet.

Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

Service Date MM/DD/YYYY

ts Log Grant Log Summary

Display Settings

120%

Note: if a date prior to 2021 is typed into the cell, an error message will appear prompting a selection of a date past 12/31/2020.

The screenshot shows the 'Financial Assistance Tool - Demo with Data' spreadsheet. The 'Service Date' column contains the following entries:

Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
17	Older adult crime survivors		\$500.00	3/15/2020	2021-Q1

An error message box from Microsoft Excel is displayed, stating: "Please enter service date past 12/31/2020. This does not need to be exact, but must be in the correct quarter." A red arrow points from the error message to the '3/15/2020' entry in the 'Service Date' column.

(continued on the next page)

REPORTING PERIOD

Based on the data entered in the Service Date column, the Reporting Period cell automatically generates the corresponding reporting period. If the reporting period appears incorrectly, go back to the service date and confirm the accuracy of the data entry.

Financial Assistance Tool - Demo with Data - Saved

Search

Carmel Rabin CR

Share Comments

Data Review View Developer Help Acrobat Table Design

General

Conditional Formatting Format as Table Cell Styles

Insert Delete Format

AutoSum Fill Clear

Sort & Filter Find & Select

Analyze Data

Alignment Number Styles Cells Editing Analysis

ce Date]], YEAR([@[Service Date]]) & "-" & "Q" & INT((MONTH([@[Service Date]])+2)/3), ""

B C D E F G

se of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be
 , this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of
 this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note,
 er regular program administration expenses.

multiple agencies, please consolidate information about all grants into one log sheet.

Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1
					Do Not Edit Auto-generated

sts Log Grant Log Summary

Display Settings

120%

(continued on the next page)

Note: manual edits of this column are not possible and will result in an error message. This column is password protected to prevent mistakes.

The screenshot shows an Excel spreadsheet titled "Financial Assistance Tool - Demo with Data - Saved". The ribbon includes tabs for Data, Review, View, Developer, Help, Acrobat, and Table Design. The formula bar shows a complex formula involving the YEAR, MONTH, and INT functions. The spreadsheet contains a table with the following data:

Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

An "Unlock Range" dialog box is open, displaying the message: "A cell you are trying to change is password protected. Enter the password to change this cell:". The dialog has "OK" and "Cancel" buttons. A yellow callout box with the text "Do Not Edit Auto-generated" points to the "Reporting Period" column. The bottom of the window shows the "Grant Log Summary" sheet and a zoom level of 120%.

5. UPDATING AND CONSOLIDATING

Throughout the reporting period, you may need to update, or consolidate data on both the EFA Log Sheet and Related Cost Log Sheet. If so, follow the step-by-step instructions below.

EDITING LOG ENTRIES

You may correct and/or add missing entries from current and former reporting periods at any time. Simply click on the cell which you would like to correct and edit the information.

- If minor mistakes or omissions occurred, make sure to include the corrected EFA Tool in the next Participant Program Report.
- If significant mistakes or omissions occurred, please reach out to your Expanded Critical Supports Program point-of-contact.

It is imperative that complete and accurate information is entered into the EFA and Related Cost Logs. Without complete and accurate information in the EFA Log, the Grant Log Summary and Program Participant Reports will present incorrect totals.

CONSOLIDATING DATA FROM MULTIPLE AGENCIES

The EFA Tool submitted to The JFNA Center through the Participant Program Report will provide data about **ALL** EFA grants funded through your Jewish Federation's subgrant. Depending on how EFA grants are allocated, your Jewish Federation may need to consolidate data entries.

- **If your EFA grants are allocated through ONE agency, your Jewish Federation does not need to consolidate data entries.** For those Jewish Federations who administer grants through ONE agency (whether this agency is the Jewish Federation itself, a Jewish Family Service, or another agency appointed by the Leadership Council), your Jewish Federation will submit ONE set of data in its quarterly submission of the EFA Tool.

- ## EFA log consolidation

- ✓ **Step 1.** Open the granting agency's EFA Tool.
- ✓ **Step 2.** Click on the EFA Log worksheet.

(continued on the next page)

- ✓ **Step 3.** Using the left-hand side of your mouse, select the new row entries between Column A (Participant ID) and Column H (Grant Details). Do not select Column I (Reporting Period).

Participant ID	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
	Jewish survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
	Jewish survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
	Jewish survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
	Jewish survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4

- ✓ **Step 4.** Hovering over the selected area, right-click the mouse and select 'Copy'.

Participant ID	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
	Jewish survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
	Jewish survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
	Jewish survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
	Jewish survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4



- ✓ Step 5. Open your Federation's EFA Tool.
- ✓ Step 6. Click on the EFA Log worksheet.

EFA Log

Using the log sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing all cells in the associated row (Participant ID, Grant Target Demographic, Grant Purpose, Grant Amount, Service Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
815634	Holocaust survivors		Appliance Repair and Rep		\$2,000.00	1/3/2021	new washing machine	2021-Q1
527224	Holocaust survivors		Case Management		\$212.45	2/15/2021		2021-Q1
916534	Asian American older adults		Dental Assistance		\$1,348.54	3/5/2021		2021-Q1
621988	Family caregivers of older adults		Caregiving		\$200.00	3/6/2021		2021-Q1
852243	Other	Pacific Islander older adults	Funeral and Burial Expenses		\$5,000.00	2/27/2021		2021-Q1
130408	Veteran older adults		Household and Personal Care Supplies		\$60.00	4/29/2021		2021-Q2
511631	Immigrant or refugee older adults		Food Assistance		\$150.00	4/1/2021		2021-Q2
928719	First Responder older adults		Food Assistance		\$54.00	7/15/2021		2021-Q3
296310	LGBTQ older adults		Utility Repair and Replacement		\$2,500.00	9/28/2021	HVAC repair	2021-Q3
187844	Older adult domestic or sexual violence survivors		Transportation		\$12.68	12/31/2021	ride share to hospital	2021-Q4
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
527224	Holocaust survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
527224	Holocaust survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
527224	Holocaust survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
815634	Holocaust survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4

- ✓ Step 7. Scroll down to the next available blank row and click on the blank cell in Column A.

EFA Log

Using the log sheet below, record each emergency financial assistance grant allocated to a unique program participant. Record the grant by completing all cells in the associated row (Participant ID, Grant Target Demographic, Grant Purpose, Grant Amount, Service Date, and Grant Details). Note, the Reporting Period column automatically populates based on the service date entered.

For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
815634	Holocaust survivors		Appliance Repair and Rep		\$2,000.00	1/3/2021	new washing machine	2021-Q1
527224	Holocaust survivors		Case Management		\$212.45	2/15/2021		2021-Q1
916534	Asian American older adults		Dental Assistance		\$1,348.54	3/5/2021		2021-Q1
621988	Family caregivers of older adults		Caregiving		\$200.00	3/6/2021		2021-Q1
852243	Other	Pacific Islander older adults	Funeral and Burial Expenses		\$5,000.00	2/27/2021		2021-Q1
130408	Veteran older adults		Household and Personal Care Supplies		\$60.00	4/29/2021		2021-Q2
511631	Immigrant or refugee older adults		Food Assistance		\$150.00	4/1/2021		2021-Q2
928719	First Responder older adults		Food Assistance		\$54.00	7/15/2021		2021-Q3
296310	LGBTQ older adults		Utility Repair and Replacement		\$2,500.00	9/28/2021	HVAC repair	2021-Q3
187844	Older adult domestic or sexual violence survivors		Transportation		\$12.68	12/31/2021	ride share to hospital	2021-Q4
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
527224	Holocaust survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
527224	Holocaust survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
527224	Holocaust survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
815634	Holocaust survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4



- ✓ **Step 8.** Right-click on your mouse and select **'Paste'**. Make sure to paste as plain text.

The screenshot shows the Excel interface with the 'Paste Options' menu open. The 'Paste' option is circled in red. The background table has the following structure:

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
			Appliance Repair and Rep		\$2,000.00	1/3/2021	new washing machine	2021-Q1
			Case Management		\$212.45	2/15/2021		2021-Q1
			Dental Assistance		\$1,348.54	3/5/2021		2021-Q1
			Caregiving		\$200.00	3/6/2021		2021-Q1
			Funeral and Burial Expenses		\$5,000.00	2/27/2021		2021-Q1
			Household and Personal Care Supplies		\$60.00	4/29/2021		2021-Q2
			Food Assistance		\$150.00	4/1/2021		2021-Q2
			Food Assistance		\$54.00	7/15/2021		2021-Q3
			Utility Repair and Replacement		\$2,500.00	9/28/2021	HVAC repair	2021-Q3
			Transportation		\$12.68	12/31/2021	ride share to hospital	2021-Q4
			Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
			Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
			Dental Assistance		\$612.95	6/20/2021		2021-Q2
			Housing Assistance		\$245.13	9/25/2021		2021-Q3
			Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4

- ✓ **Step 9.** Check that Reporting Period cells associated with the new rows have correctly populated.

The screenshot shows the Excel interface with the 'EFA Log' table. The 'Reporting Period' column is highlighted with a red box. The table has the following structure:

Participant ID (Claims Conference ID)	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Purpose	Specify if 'Other' Grant Purpose	Grant Amount	Service Date	Grant Details	Reporting Period
815634	Holocaust survivors		Appliance Repair and Rep		\$2,000.00	1/3/2021	new washing machine	2021-Q1
527224	Holocaust survivors		Case Management		\$212.45	2/15/2021		2021-Q1
916534	Asian American older adults		Dental Assistance		\$1,348.54	3/5/2021		2021-Q1
621988	Family caregivers of older adults		Caregiving		\$200.00	3/6/2021		2021-Q1
852243	Other	Pacific Islander older adults	Funeral and Burial Expenses		\$5,000.00	2/27/2021		2021-Q1
130408	Veteran older adults		Household and Personal Care Supplies		\$60.00	4/29/2021		2021-Q2
511631	Immigrant or refugee older adults		Food Assistance		\$150.00	4/1/2021		2021-Q2
928719	First Responder older adults		Food Assistance		\$54.00	7/15/2021		2021-Q3
296310	LGBTQ older adults		Utility Repair and Replacement		\$2,500.00	9/28/2021	HVAC repair	2021-Q3
187844	Older adult domestic or sexual violence survivors		Transportation		\$12.68	12/31/2021	ride share to hospital	2021-Q4
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
527224	Holocaust survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
527224	Holocaust survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
527224	Holocaust survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
815634	Holocaust survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4
815634	Holocaust survivors		Clothing		\$124.35	2/13/2021	winter coat	2021-Q1
	ust survivors		Medical Assistance		\$65.00	3/14/2021	medice co-pay	2021-Q1
	ust survivors		Dental Assistance		\$612.95	6/20/2021		2021-Q2
	ust survivors		Housing Assistance		\$245.13	9/25/2021		2021-Q3
	ust survivors		Housing Repairs		\$3,000.00	10/1/2021	flooding damage	2021-Q4



When compiling data from multiple granting agencies, make sure Participant IDs across granting organizations do not conflict.

- If all granting agencies use Claim Conference IDs, then the Participant ID column will not conflict.
- If granting agencies use a case management or other IDs, make sure those case management systems do not use overlapping IDs for different participants.

Related cost log consolidation

To consolidate data entries from the Related Cost Log, follow the instructions below.

- ✓ **Step 1.** Open the granting agency's EFA Tool.
- ✓ **Step 2.** Click on the Related Cost Log worksheet.

The screenshot shows the Microsoft Excel interface for the "Emergency Financial Assistance Tool - Demo with Data - Granting Agency - Saved". The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help, and Acrobat. The Home tab is active, showing options for Clipboard, Font, Paragraph, Styles, Cells, Editing, and Analysis.

The worksheet displays a log sheet titled "Related Costs Log". The instructions state: "Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses."

A note specifies: "For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet."

The log sheet table has the following columns:

- Grant Purpose
- Number of Participants Served
- Grant Target Demographic
- Specify if 'Other' Demographic Type
- Grant Amount
- Service Date
- Reporting Period

The first two rows of data are as follows:

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

The bottom of the screen shows the navigation pane with tabs for Introduction, EFA Log, Related Costs Log (highlighted), and Grant Log Summary.

- ✓ **Step 3.** Using the left-hand side of your mouse, select the new row entries between Column A (Grant Purpose) and Column F (Service Date). Do not select Column G (Reporting Period).

Related Costs Log
Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

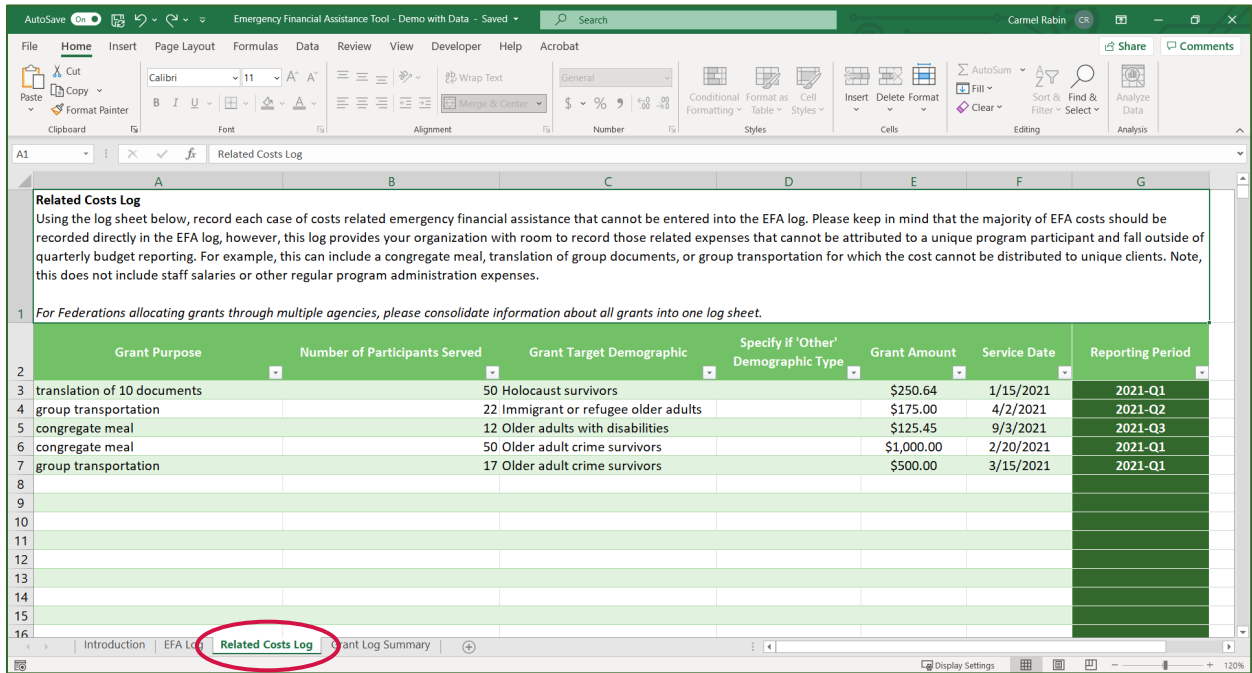
- ✓ **Step 4.** Hovering over the selected area, right-click the mouse and select 'Copy'.

Related Costs Log
Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses.

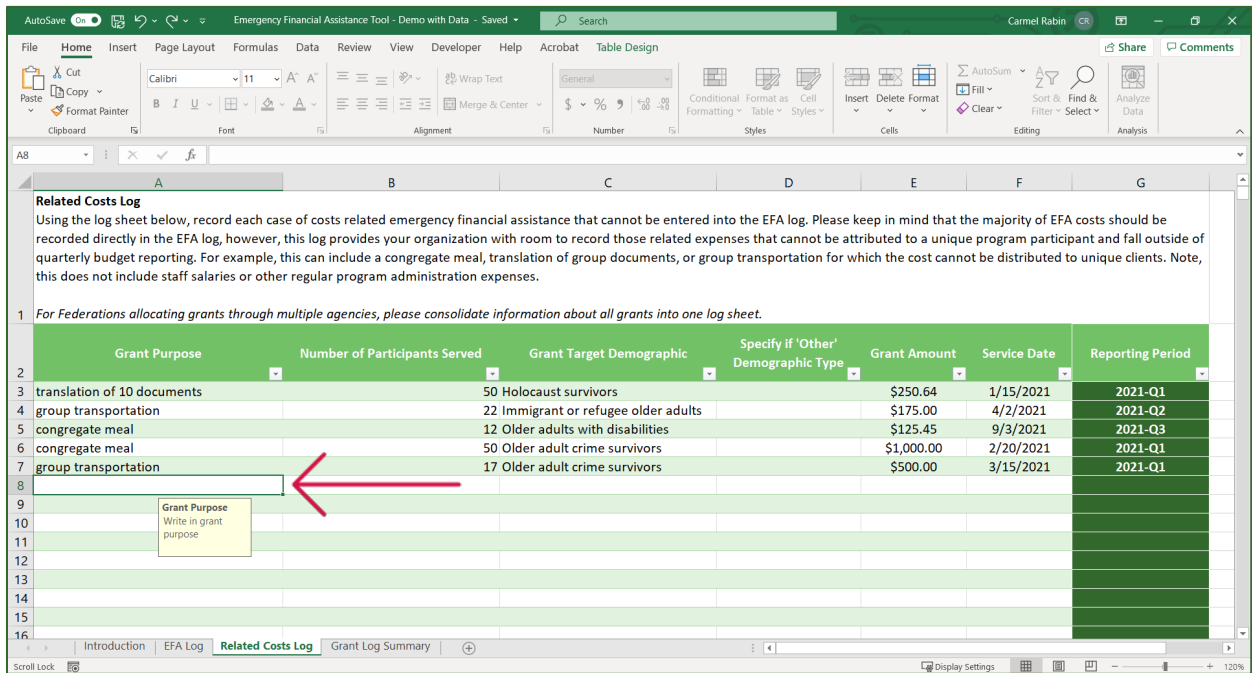
1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

- ✓ **Step 5.** Open your Federation's EFA Tool.
- ✓ **Step 6.** Click on the Related Cost Log worksheet.



- ✓ **Step 7.** Scroll down to the next available blank row and click on the blank cell in Column A.



- ✓ **Step 8.** Right-click on your mouse and select 'Paste'. Make sure to paste as plain text.

Related Costs Log
Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
translation of 10 documents	50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
group transportation	22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
congregate meal	12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1

- ✓ **Step 9.** Check that Reporting Period cells associated with the new rows have correctly populated.

Related Costs Log
Using the log sheet below, record each case of costs related emergency financial assistance that cannot be entered into the EFA log. Please keep in mind that the majority of EFA costs should be recorded directly in the EFA log, however, this log provides your organization with room to record those related expenses that cannot be attributed to a unique program participant and fall outside of quarterly budget reporting. For example, this can include a congregate meal, translation of group documents, or group transportation for which the cost cannot be distributed to unique clients. Note, this does not include staff salaries or other regular program administration expenses.

1 For Federations allocating grants through multiple agencies, please consolidate information about all grants into one log sheet.

Grant Purpose	Number of Participants Served	Grant Target Demographic	Specify if 'Other' Demographic Type	Grant Amount	Service Date	Reporting Period
translation of 10 documents	50	Holocaust survivors		\$250.64	1/15/2021	2021-Q1
group transportation	22	Immigrant or refugee older adults		\$175.00	4/2/2021	2021-Q2
congregate meal	12	Older adults with disabilities		\$125.45	9/3/2021	2021-Q3
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1
congregate meal	50	Older adult crime survivors		\$1,000.00	2/20/2021	2021-Q1
group transportation	17	Older adult crime survivors		\$500.00	3/15/2021	2021-Q1



6. GRANT LOG SUMMARY

As you enter data throughout the reporting period, you may be curious about EFA grant allocation trends. The Grant Log Summary provides you with this summary automatically and can be refreshed at any time.

CONTENT OF GRANT LOG SUMMARY

The Grant Log Summary is an automatically generated summary of the EFA and Related Cost Logs. The Grant Log Summary is divided into two tables as detailed and shown below:

1. **EFA Summary.** This table automatically totals the number of EFA grants provided, grant amount allocated, and number of unique program participants served through EFA grants. This table can be filtered by reporting period and grant target demographic.
2. **Related Cost Summary.** This table automatically totals the amount of Related Cost grants allocated by reporting period. This table cannot be filtered.

Below is a summary of your organization's emergency financial assistance grants. This page is automatically generated based on the EFA Log and Related Cost Log. To see updated numbers based on your most recent log entries, please press the blue 'refresh' button to the right. Scroll to the bottom of the table to see the total grants given, total grant amounts, and total unique participants served.

EFA Summary			
	Number of Grants	Total Grant Amount	Unique Participants
Appliance Repair and Replacement	1	\$2,000.00	1
Holocaust survivors	1	\$2,000.00	1
Caregiving	1	\$200.00	1
Family caregivers of older adults	1	\$200.00	1
Case Management	1	\$212.45	1
Holocaust survivors	1	\$212.45	1
Clothing	1	\$124.35	1
Holocaust survivors	1	\$124.35	1
Dental Assistance	2	\$1,961.49	2
Asian American older adults	1	\$1,348.54	1
Holocaust survivors	1	\$612.95	1
Food Assistance	2	\$204.00	2
First Responder older adults	1	\$54.00	1
Immigrant or refugee older adults	1	\$150.00	1
Funeral and Burial Expenses	1	\$5,000.00	1
Other	1	\$5,000.00	1
Household and Personal Care Supplies	1	\$60.00	1
Veteran older adults	1	\$60.00	1
Housing Assistance	1	\$245.13	1
Holocaust survivors	1	\$245.13	1
Housing Repairs	1	\$3,000.00	1
Holocaust survivors	1	\$3,000.00	1
Medical Assistance	1	\$65.00	1
Holocaust survivors	1	\$65.00	1

Related Cost Summary	
Additional Cost Summary	Sum of Grant Amount
2021-Q1	\$1,750.64
congregate meal	\$1,000.00
group transportation	\$500.00
translation of 10 documents	\$250.64
2021-Q2	\$175.00
group transportation	\$175.00
2021-Q3	\$125.45
congregate meal	\$125.45
Grand Total	\$2,051.09

Use the filters below to view data by reporting period and grant target demographic. Selected filters appear in BLUE, and unselected filters appear in GREY.

To select or unselect multiple categories in the same filter, press down the 'Ctrl' key while selecting categories with your mouse. To clear selection, click the icon at the top-right of the filter.

If a category does not appear in the table or in the filters below, this means that there is no corresponding data in the log for this category.

Click below to filter your data by reporting period

Reporting Period

2021-Q1
2021-Q2
2021-Q3
2021-Q4

Click below to filter your data by target grant demographic

Grant Target Demographic

Asian American older adults
Family caregivers of older adults



USE OF GRANT LOG SUMMARY

The Grant Log Summary can and should be used by all who use the EFA Tool. The Grant Log Summary can be used by granting organizations, Jewish Federations, and The JFNA Center to have timely and easily accessible data on grant trends and allocation progress.

UPDATING THE GRANT LOG SUMMARY

The Grant Log Summary automatically pulls data from the EFA and Related Cost Logs. To refresh the information appearing in the summary tables, following the instructions below.

- ✓ **Step 1.** Click the refresh button at the top of the page.

Below is a summary of your organization's emergency financial assistance grants. *This page is automatically generated based on the EFA Log and Related Cost Log.* To see updated numbers based on your most recent log entries, please press the blue 'refresh' button to the right. Scroll to the bottom of the table to see the total grants given, total grant amounts, and total unique participants served.

EFA Summary

EFA Summary	Number of Grants	Total Grant Amount	Unique Participants
Appliance Repair and Replacement	1	\$2,000.00	1
Holocaust survivors	1	\$2,000.00	1
Caregiving	1	\$200.00	1
Family caregivers of older adults	1	\$200.00	1
Case Management	1	\$212.45	1
Holocaust survivors	1	\$212.45	1
Clothing	1	\$124.35	1
Holocaust survivors	1	\$124.35	1
Dental Assistance	2	\$1,961.49	2
Asian American older adults	1	\$1,348.54	1
Holocaust survivors	1	\$612.95	1
Food Assistance	2	\$204.00	2
First Responder older adults	1	\$54.00	1
Immigrant or refugee older adults	1	\$150.00	1
Funeral and Burial Expenses	1	\$5,000.00	1
Other	1	\$5,000.00	1
Household and Personal Care Supplies	1	\$60.00	1
Veteran older adults	1	\$60.00	1
Housing Assistance	1	\$245.13	1
Holocaust survivors	1	\$245.13	1
Housing Repairs	1	\$3,000.00	1
Holocaust survivors	1	\$3,000.00	1
Medical Assistance	1	\$65.00	1
Holocaust survivors	1	\$65.00	1

Use the filters below to view data by reporting period and grant target demographic.

Selected filters appear in **BLUE**, and unselected filters appear in **GREY**.

To select or unselect multiple categories in the same filter, press down the 'Ctrl' key while selecting categories with your mouse.

To clear selection, click the icon at the top-right of the filter.

If a category does not appear in the table or in the filters below, this means that there is no corresponding data in the log for this category.

Click below to filter your data by reporting period

Reporting Period

- 2021-Q1
- 2021-Q2
- 2021-Q3
- 2021-Q4

Click below to filter your data by target grant demographic

Grant Target Demographic

- Asian American older adults
- Family caregivers of older adults

Related Cost Summary

Additional Cost Summary	Sum of Grant Amount
2021-Q1	\$3,750.64
congregational meal	\$1,000.00
group transportation	\$500.00
translation of 10 documents	\$250.64
2021-Q2	\$175.00
group transportation	\$175.00
2021-Q3	\$125.45
congregational meal	\$125.45
Grand Total	\$2,051.09

- ✓ **Step 2.** Once the tables have been refreshed, a message box will appear confirming the refresh. Click **'Okay'** and proceed to viewing the updated tables.

Below is a summary of your organization's emergency financial assistance grants. *This page is automatically generated based on the EFA Log and Related Cost Log.* To see updated numbers based on your most recent log entries, please press the blue 'refresh' button to the right. Scroll to the bottom of the table to see the total grants given, total grant amounts, and total unique participants served.

EFA Summary

EFA Summary	Number of Grants	Total Grant Amount	Unique Participants
Appliance Repair and Replacement	1	\$2,000.00	1
Holocaust survivors	1	\$2,000.00	1
Caregiving	1	\$200.00	1
Family caregivers of older adults	1	\$200.00	1
Case Management	1	\$212.45	1
Holocaust survivors	1	\$212.45	1
Clothing	1	\$124.35	1
Holocaust survivors	1	\$124.35	1
Dental Assistance	2	\$1,961.49	2
Asian American older adults	1	\$1,348.54	1
Holocaust survivors	1	\$612.95	1
Food Assistance	2	\$204.00	2
First Responder older adults	1	\$54.00	1
Immigrant or refugee older adults	1	\$150.00	1
Funeral and Burial Expenses	1	\$5,000.00	1
Other	1	\$5,000.00	1
Household and Personal Care Supplies	1	\$60.00	1
Veteran older adults	1	\$60.00	1
Housing Assistance	1	\$245.13	1
Holocaust survivors	1	\$245.13	1
Housing Repairs	1	\$3,000.00	1
Holocaust survivors	1	\$3,000.00	1
Medical Assistance	1	\$65.00	1
Holocaust survivors	1	\$65.00	1

Related Cost Summary

Additional Cost Summary	Sum of Grant Amount
2021-Q1	\$1,750.64
congregate meal	\$1,000.00
group transportation	\$500.00
translation of 10 documents	\$250.64
2021-Q2	\$175.00
group transportation	\$175.00
2021-Q3	\$125.45
congregate meal	\$125.45
Grand Total	\$2,051.09

Microsoft Excel
All Tables Refreshed
OK

FILTERING THE GRANT LOG SUMMARY

The EFA Summary table can be filtered by Reporting Period and by Grant Target Demographic. Filtering using these two options is helpful when determining grant totals during a given time period or for a specific demographic type.

Using One Filter. To use a filter, select the category by which you would like to see data. For example, to see data for the first quarter of 2021, click 2021-Q1. Selected filter categories will appear in **blue** and unselected categories will appear in **grey**. One filter selection is shown on the next page.

AutoSave On Emergency Financial Assistance Tool - Demo With Data - Saved Carmel Rabin CR

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N62

Below is a summary of your organization's emergency financial assistance grants. *This page is automatically generated based on the EFA Log and Related Cost Log.* To see updated numbers based on your most recent log entries, please press the blue 'refresh' button to the right. Scroll to the bottom of the table to see the total grants given, total grant amounts, and total unique participants served.

EFA Summary

Use the filters below to view data by reporting period and grant target demographic.

Selected filters appear in BLUE, and unselected filters appear in GREY.

To select or unselect multiple categories in the same filter, press down the 'Ctrl' key while selecting categories with your mouse.

To clear selection, click the icon at the top-right of the filter.

If a category does not appear in the table or in the filters below, this means that there is no corresponding data in the log for this category.

Click below to filter your data by reporting period

Reporting Period

2021-Q1
2021-Q2
2021-Q3
2021-Q4

Click below to filter your data by target grant demographic

Grant Target Demographic

Asian American older adults
Family caregivers of older adults

Related Cost Summary

Additional Cost Summary

2021-Q1
congregate meal
group transportation
translation of 10 documents
2021-Q2
group transportation
2021-Q3
congregate meal
Grand Total

EFA Summary	Number of Grants	Total Grant Amount	Unique Participants
Appliance Repair and Replacement	1	\$2,000.00	1
Holocaust survivors	1	\$2,000.00	1
Caregiving	1	\$200.00	1
Family caregivers of older adults	1	\$200.00	1
Case Management	1	\$212.45	1
Holocaust survivors	1	\$212.45	1
Clothing	1	\$124.35	1
Holocaust survivors	1	\$124.35	1
Dental Assistance	1	\$1,348.54	1
Asian American older adults	1	\$1,348.54	1
Funeral and Burial Expenses	1	\$5,000.00	1
Other	1	\$5,000.00	1
Medical Assistance	1	\$65.00	1
Holocaust survivors	1	\$65.00	1
Grand Total	7	\$8,950.34	5

Introduction | EFA Log | Related Costs Log | **Grant Log Summary**

Scroll Lock Display Settings 70%

If you would like to select multiple categories within the same filter, press down the 'Ctrl' key while clicking multiple categories with your mouse. For example, to see data from the first two quarters of 2021, press down 'Ctrl' and click 2021-Q1 and 2021 Q2. A filter selection of multiple categories is shown on the next page.

(continued on the next page)

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Below is a summary of your organization's emergency financial assistance grants. *This page is automatically generated based on the EFA Log and Related Cost Log.* To see updated numbers based on your most recent log entries, please press the blue 'refresh' button to the right. Scroll to the bottom of the table to see the total grants given, total grant amounts, and total unique participants served.

EFA Summary

Use the filters below to view data by reporting period and grant target demographic.

Selected filters appear in BLUE, and unselected filters appear in GREY.

To select or unselect multiple categories in the same filter, press down the 'Ctrl' key while selecting categories with your mouse.

To clear selection, click the icon at the top-right of the filter.

If a category does not appear in the table or in the filters below, this means that there is no corresponding data in the log for this category.

Click below to filter your data by reporting period

Click below to filter your data by target grant demographic

Related Cost Summary

EFA Summary	Number of Grants	Total Grant Amount	Unique Participants
Appliance Repair and Replacement	1	\$2,000.00	1
Holocaust survivors	1	\$2,000.00	1
Caregiving	1	\$200.00	1
Family caregivers of older adults	1	\$200.00	1
Case Management	1	\$212.45	1
Holocaust survivors	1	\$212.45	1
Clothing	1	\$124.35	1
Holocaust survivors	1	\$124.35	1
Dental Assistance	2	\$1,961.49	2
Asian American older adults	1	\$1,348.54	1
Holocaust survivors	1	\$612.95	1
Food Assistance	1	\$150.00	1
Immigrant or refugee older adults	1	\$150.00	1
Funeral and Burial Expenses	1	\$5,000.00	1
Other	1	\$5,000.00	1
Household and Personal Care Supplies	1	\$60.00	1
Veteran older adults	1	\$60.00	1
Medical Assistance	1	\$65.00	1
Holocaust survivors	1	\$65.00	1
Grand Total	10	\$9,773.29	7

Additional Cost Summary	Sum of Grant Amount
2021-Q1	\$1,750.64
congregate meal	\$1,000.00
group transportation	\$500.00
translation of 10 documents	\$250.64
2021-Q2	\$175.00
group transportation	\$175.00
2021-Q3	\$125.45
congregate meal	\$125.45
Grand Total	\$2,051.09

Reporting Period

- 2021-Q1
- 2021-Q2
- 2021-Q3
- 2021-Q4

Grant Target Demographic

- Asian American older adults
- Family caregivers of older adults

Introduction EFA Log Related Costs Log **Grant Log Summary**

Display Settings 70%

Using Multiple Filters. You can use multiple filters at the same time. For example, you can see data for the first quarter of 2021 by Holocaust survivors by clicking 2021-Q1 under Reporting Period and Holocaust survivors under Grant Target Demographic. An image of this selection is shown on the next page.

Note: use the 'Ctrl' key to select multiple categories within the same filter. Do not use the 'Ctrl' key to select multiple categories across multiple filters.

(continued on the next page)

AutoSave On Emergency Financial Assistance Tool - Demo with Data - Saved Carmel Rabin CR

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N62

EFA Summary

EFA Summary	Number of Grants	Total Grant Amount	Unique Participants
Appliance Repair and Replacement	1	\$2,000.00	1
Holocaust survivors	1	\$2,000.00	1
Case Management	1	\$212.45	1
Holocaust survivors	1	\$212.45	1
Clothing	1	\$124.35	1
Holocaust survivors	1	\$124.35	1
Dental Assistance	1	\$612.95	1
Holocaust survivors	1	\$612.95	1
Medical Assistance	1	\$65.00	1
Holocaust survivors	1	\$65.00	1
Grand Total	5	\$3,014.75	2

Use the filters below to view data by reporting period and grant target demographic.

Selected filters appear in **BLUE**, and unselected filters appear in **GREY**.

To select or unselect multiple categories in the same filter, press down the "Ctrl" key while selecting categories with your mouse.

To clear selection, click the icon at the top-right of the filter.

If a category does not appear in the table or in the filters below, this means that there is no corresponding data in the log for this category.

Click below to filter your data by reporting period

Reporting Period

- 2021-Q1
- 2021-Q2
- 2021-Q3
- 2021-Q4

Click below to filter your data by target grant demographic

Grant Target Demographic

- Asian American older adults
- Family caregivers of older adults
- Holocaust survivors
- Immigrant or refugee older adults
- Other

Related Cost Summary

Additional Cost Summary	Sum of Grant Amount
2021-Q1	\$1,750.64
congregate meal	\$1,000.00
group transportation	\$500.00
translation of 10 documents	\$250.64
2021-Q2	\$175.00
group transportation	\$175.00
2021-Q3	\$125.45
congregate meal	\$125.45
Grand Total	\$2,051.09

Introduction EFA Log Related Costs Log **Grant Log Summary**

Scroll Lock Display Settings 70%

Clearing a Filter. To clear a filter and restore the original view of all data, click the **Clear Filter** button on each of the active filters. This will remove your previous selection of filter categories and restore your view of the entire data set.

Reporting Period

- 2021-Q1
- 2021-Q2
- 2021-Q3
- 2021-Q4

Clear Filter (Alt+C)

What if a Filter Category Does Not Appear? If a filter category does not appear in the filter box, this means that

data corresponding to this category does not exist in the EFA Log. If you believe you have entered data corresponding to this category, clear all filters and refresh the Grant Log Summary sheet. This action will update the Grant Log Summary filters with new data.

7. SUBMITTING THE EFA TOOL

Now that you have recorded data in the EFA Tool for an entire quarter, it's time to share your progress with The JFNA Center on Aging and Trauma!

HOW TO SUBMIT THE EFA TOOL


The EFA Tool is submitted through the [Participant Program Report](#) under the last section titled '**Emergency Financial Assistance**'. Key data from the EFA Tool is entered in the chart as shown in the picture below. Additionally, an updated copy of the EFA Tool is uploaded to the Participant Program Report as shown in the picture below.

Emergency Financial Assistance

In the table below, please record details of emergency financial assistance (EFA) provided through your organization's grant program. Note, this information can be found in the EFA Tool. *

	Number of UNPULICATED Holocaust survivors served	Number of UNPULICATED older adults with a history of trauma served	Number of grants provided	Total grant amount provided
This Reporting Quarter				
To Date				

Please upload a copy of your organization's EFA Tool with updated data for this reporting period. *


Browse Files
Drag and drop files here

REPORTING CALENDAR

The EFA Tool is submitted on a quarterly basis. The reporting deadlines can be found in the Participant Program Report and in the chart below.

Quarter	Reporting Period	Reporting Deadline
Quarter 1	1/1/21 - 3/31/2021	4/30/2021
Quarter 2	4/1/21 - 6/30/21	7/30/2021
Quarter 3	7/1/21 - 9/30/21	10/29/2021
Quarter 4	10/1/21 - 12/31/21	1/31/2022
Quarter 5	1/1/22 - 3/31/22	4/29/2022
Quarter 6	4/1/22 - 6/30/22	7/29/2022
Quarter 7	7/1/22 - 9/30/22	10/31/2022
Quarter 8	10/1/22 - 12/31/22	1/31/2023

FREQUENCY OF EFA TOOL USE

Granting organizations may enter data into the EFA Tool as often as they wish, prioritizing timely and accurate data for quarterly reporting. For example, a granting organization may enter data after each EFA grant is awarded or on a weekly or monthly basis.

CLAIMS CONFERENCE DIAMOND SYSTEM

For participants served through the Expanded Critical Supports Program, there is no longer a need to report into the Diamond system. However, this does not change any other reporting requirements and commitments your organization may have with the Claims Conference to use Diamond for other programs unrelated to the Expanded Critical Supports Program.

PROGRAMMATIC REPORTS

Participant data will no longer be reported in programmatic reports. Instead, all participant numbers will be reported through the Program Participant Report.

APPENDIX 1. CREATING UNIQUE PARTICIPANT IDS

Do you need to complete the Participant ID column of the EFA log, but your organization does not have access to participant Claims Conference IDs or Case Management IDs?

No problem! Use the [Participant ID Generator](#) and steps below to generate unique participant IDs for the EFA Tool. Simply use the Participant ID column of the Participant ID Generator to complete the EFA Log.

Before using the Participant ID Generator, save it in a safe and reliable location. Keep in mind that you will need to use the same Participant ID Generator workbook over the course of the grant, so save the workbook in a location where you will be able to continuously add grant participants. Consider routinely backing up copies of the file to avoid loss of data. Avoid saving the file on your desktop as it may be harder to recover desktop files if your computer experiences hardware failure.

When submitting the EFA Tool through the Program Participant Report,

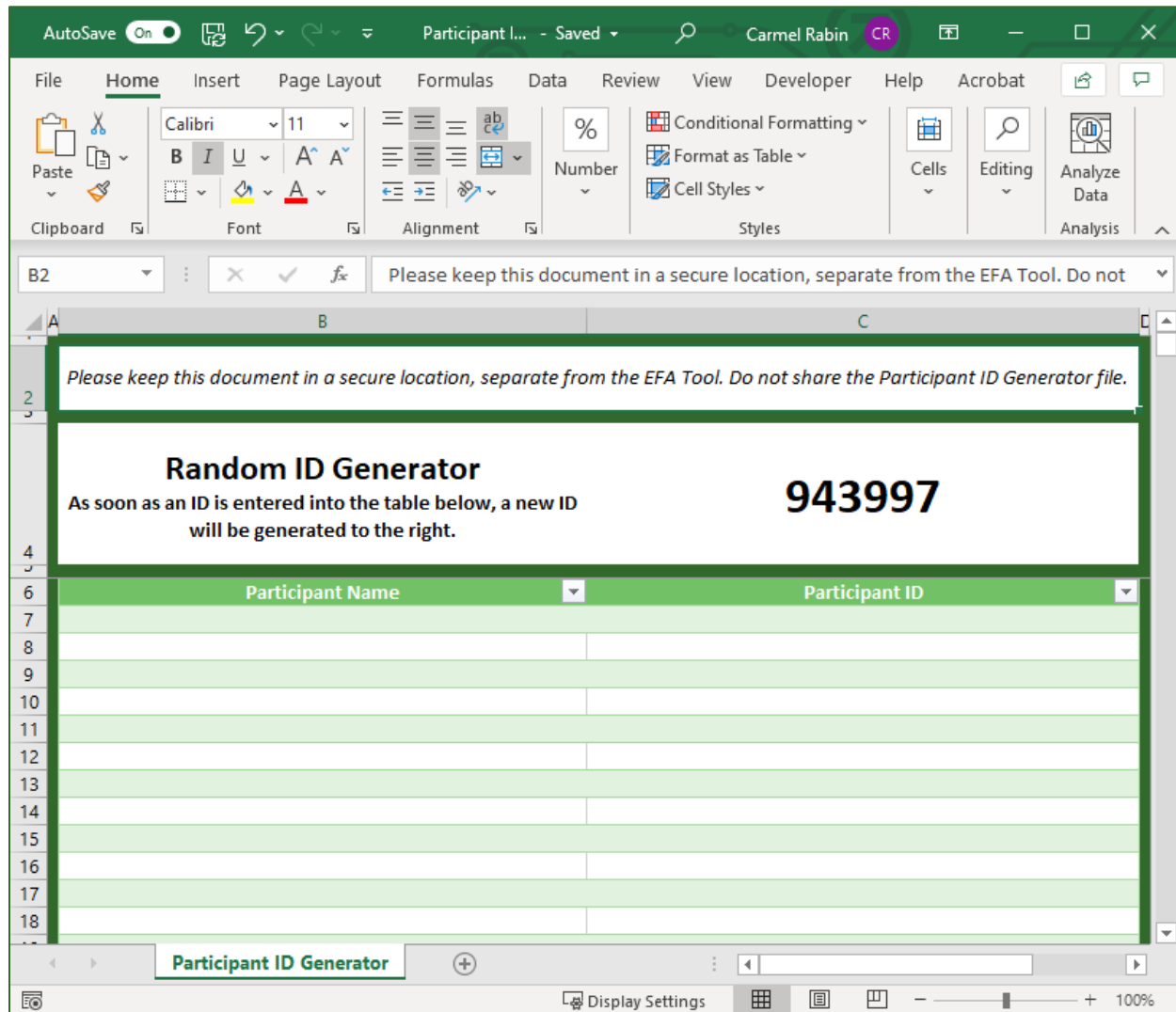
- **Do not** enter a participant's first or last name into the **EFA Log**.
- **Do not** submit the Participant ID Generator through **quarterly reporting**.

The Participant ID Generator will serve as a key for you to look up the names associated with Participant IDs. Other than the participant IDs, information from the Participant ID Generator should not be provided to The JFNA Center (through the EFA Log or Program Participant Report) to maintain the confidentiality of your program participants.

To use the Participant ID Generator, follow the steps below.

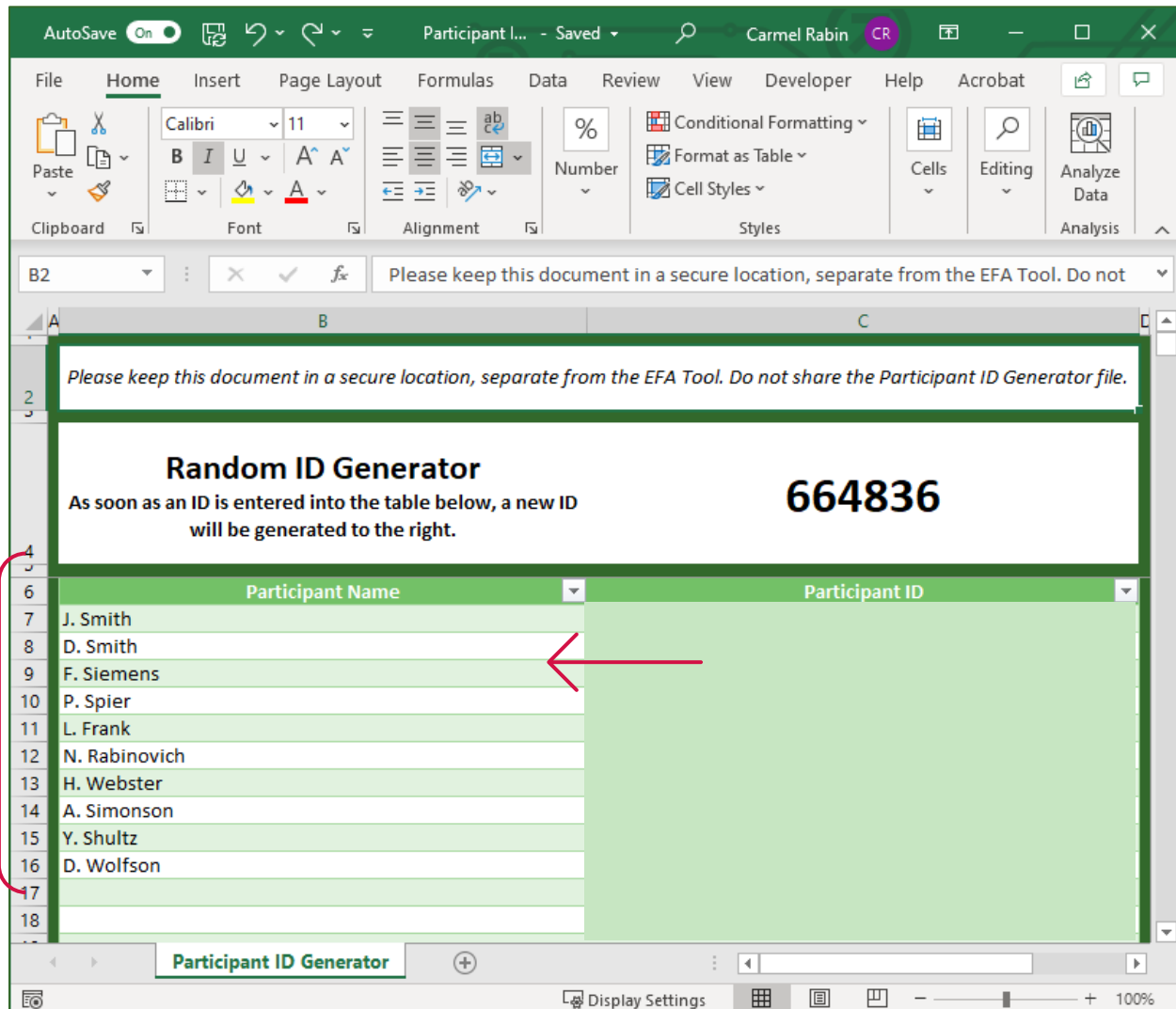
(continued on the next page)

- ✓ Step 1. Open the Participant ID Generator.



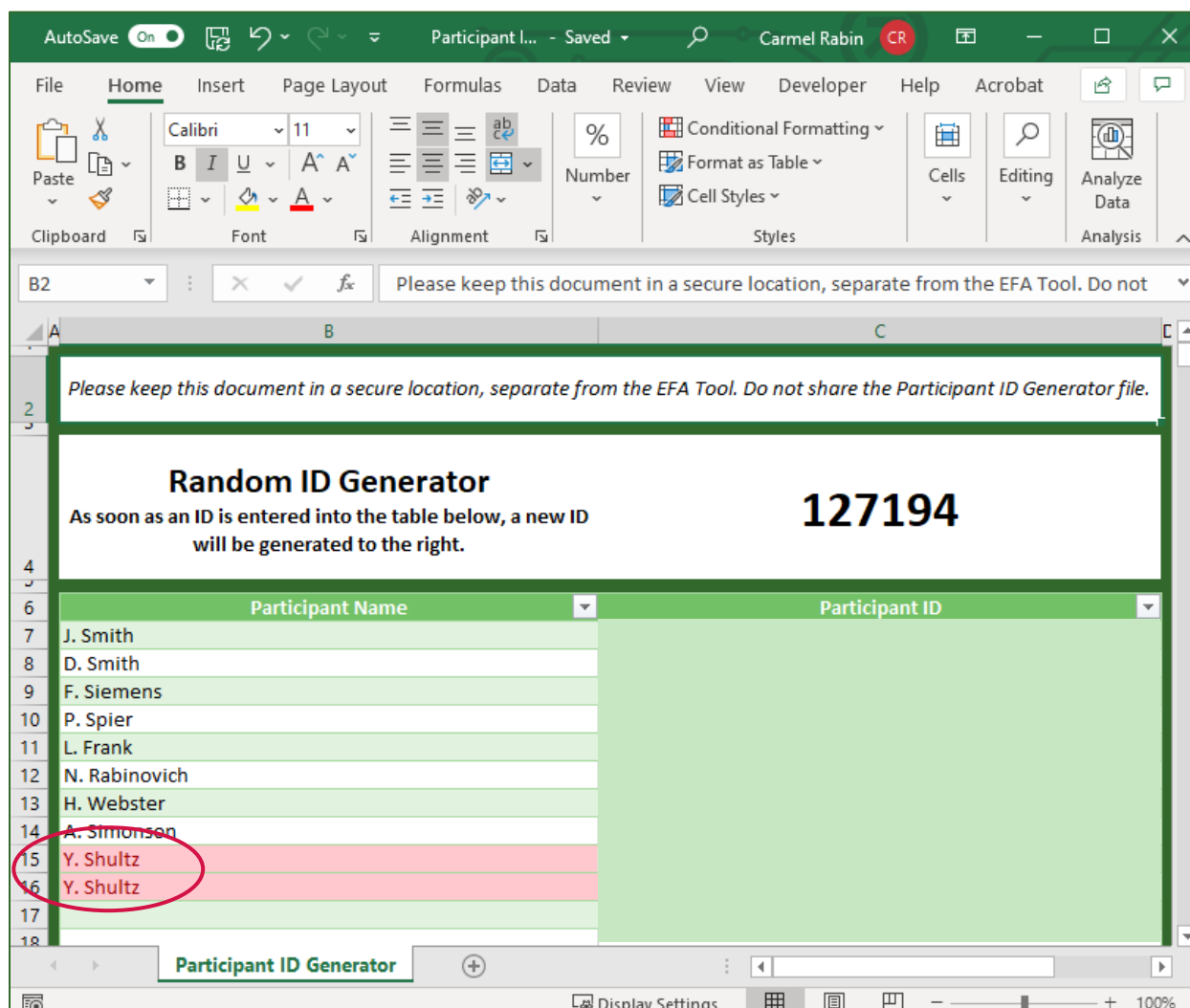
(continued on the next page)

- ✓ Step 2. Manually enter participant names in Column B.



(continued on the next page)

Note: duplicate names will be highlighted in red. Reduce duplicates by removing repeat participants entered in error. If unique participants share the same name, add additional information to the participant's name column to differentiate these participants.



(continued on the next page)

- ✓ **Step 3.** Copy the number in cell C4 of the Random ID Generator.

The screenshot shows a Microsoft Excel window titled 'Participant ID Generator - Saved'. The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help, Acrobat, and Analysis. The Home ribbon is active, showing options for Clipboard, Font, Alignment, Styles, Cells, Editing, and Analysis. The status bar at the bottom indicates 'Participant ID Generator' and 'Display Settings'.

Worksheet: Participant ID Generator

Please keep this document in a secure location, separate from the EFA Tool. Do not share the Participant ID Generator file.

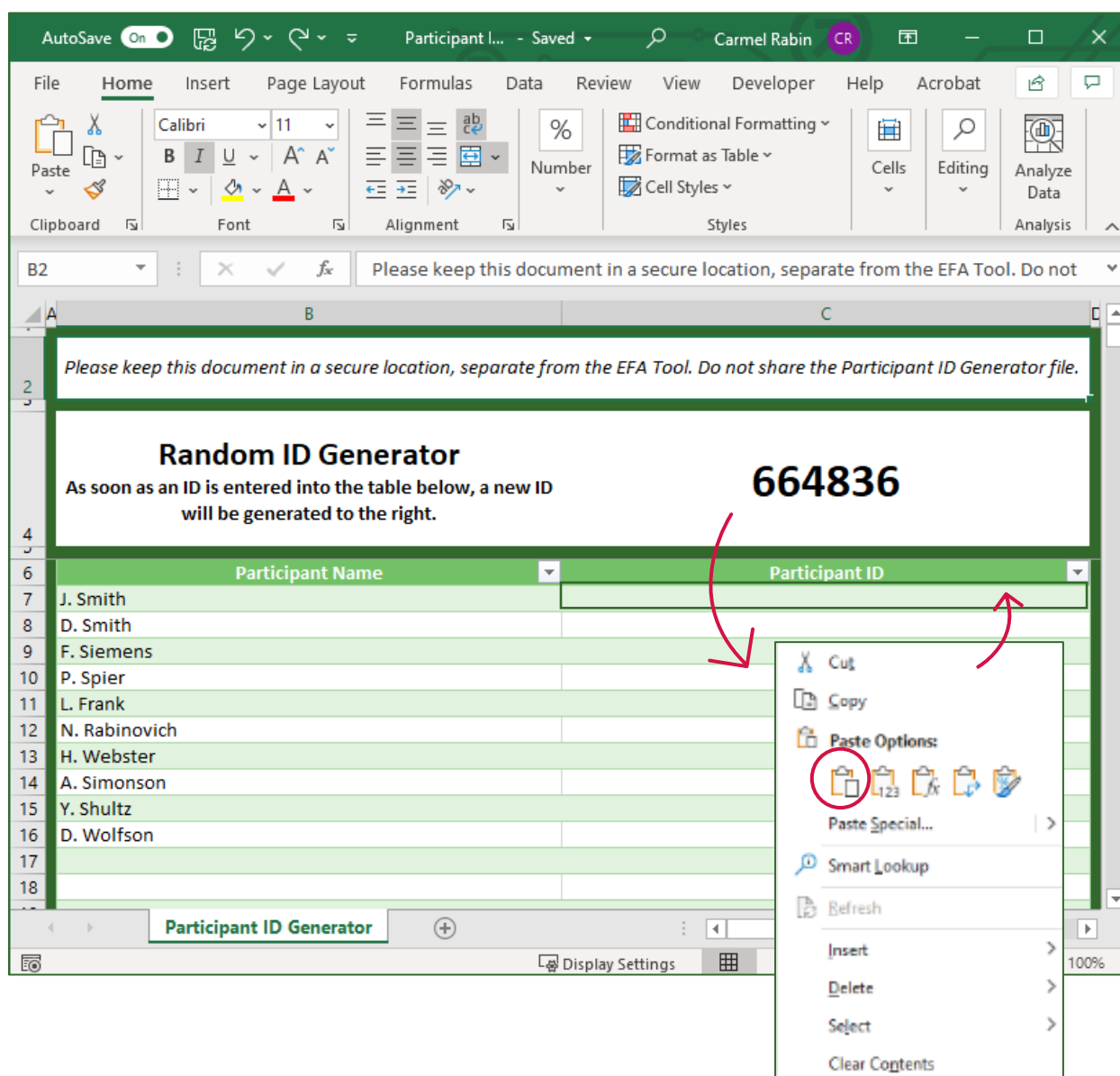
Random ID Generator
As soon as an ID is entered into the table below, a new ID will be generated to the right.

Participant Name	Participant ID
J. Smith	
D. Smith	
F. Siemens	
P. Spier	
L. Frank	
N. Rabinovich	
H. Webster	
A. Simonson	
Y. Shultz	
D. Wolfson	

The number 664836 is displayed in cell C4, circled in red.

(continued on the next page)

- ✓ **Step 4.** Paste the number as plain text to the name for which you are generating a participant ID. Note, you can also write in the number instead of copying and pasting.



(continued on the next page)

- ✓ **Step 5.** After a number is pasted into the Participant ID column, a new participant ID will be generated in cell C4. Use this newly generated number to repeat the copying and pasting process for all participant IDs needed.

Please keep this document in a secure location, separate from the EFA Tool. Do not share the Participant ID Generator file.

Random ID Generator

As soon as an ID is entered into the table below, a new ID will be generated to the right.

664836

Participant Name	Participant ID
J. Smith	
D. Smith	
F. Siemens	
P. Spier	
L. Frank	
N. Rabinovich	
H. Webster	
A. Simonson	
Y. Shultz	
D. Wolfson	

Participant ID Generator

(continued on the next page)

Note: duplicate participant IDs will be highlighted in red. Reduce duplicates by selecting a new participant ID so that each participant ID is used once.

Please keep this document in a secure location, separate from the EFA Tool. Do not share the Participant ID Generator file.

Random ID Generator

As soon as an ID is entered into the table below, a new ID will be generated to the right.

Participant Name	Participant ID
J. Smith	815634
D. Smith	527224
F. Siemens	916534
P. Spier	621988
L. Frank	852243
N. Rabinovich	130408
H. Webster	511631
A. Simonson	928719
Y. Shultz	296310
D. Wolfson	296310

Participant ID Generator

- ✓ **Step 6.** Use the Participant ID column of the Participant ID Generator to complete the Participant ID column of the EFA Log.

Congratulations!

You have completed reviewing the EFA Training Guide.
Do you have more questions?

Please contact The Jewish Federations of North America's Center on Aging and Trauma at
Aging@JewishFederations.org



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