



# Financial Education Partnership Grant Application Instructions

## GETTING STARTED

1. Turn off pop-up blockers.

\*\*\***Note:** If you are using a MAC you must use Firefox web browser, this online software is not compatible with Safari.

2. Using Internet Explorer type [www.ckodm.com/uwsv](http://www.ckodm.com/uwsv) in your web browser.
3. Login using the following :

USERNAME: **bankonsj**

PASSWORD: **bankonsj**

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**HOME PAGE (MY ODM)**- At any time, click **MY ODM** on the left menu bar to return to the home page.

1. Click “here” at the bottom of the page to begin the application at the **Agency Intake Form**. Agency Intake Form is used create your account in order to complete this application.
2. Complete **Agency Intake Form** and click **Duplicate Check** at top of the page.
3. If no duplicate account is found, save your **Agency Intake Form** and logout out of the application. For newly established accounts, please allow 24 hours for your account to be activated once it’s been saved. You will not be able to access the application until your username and password has been activated, an email will be sent to confirm activation.

\*\*\***Note:** If a duplicate record of your agency is found please contact your agency’s administrator for username and password, or send an email request to [jay.streeter@uwsv.org](mailto:jay.streeter@uwsv.org)

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## COMPLETING THE APPLICATION

1. Login using your agency’s unique username and password.
2. Click your agency’s name which will appear as a link on the left hand side under **My Folders**.
3. Click on **Bank on San Jose** located on the center left of the page.

4. Select **Bank on San Jose Financial Education Partnership Grant** from the drop down menu at the top of the page.
5. Answer all questions fully. All documents must be uploaded and all questions must be answered in order to be considered for this grant.

**\*\*\*Note:** Applications may be saved at any time by clicking the “Save” button at the top of the page.

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#### **EDIT/VIEW YOUR EXISTING APPLICATION**

1. Login using your agency’s unique username and password.
2. Click your agency’s name which will appear as a link on the left hand side under **My Folders**.
3. Click on **Bank on San Jose** located on the center left of the page.
4. Your application will appear in bold under your agency name.
5. Click the link to open your existing application.

**\*\*\*Note:** Applications may be saved at any time by clicking the “Save” button at the top of the page.