

Grant Wizard & Collaborations Guide

CHWOne Platform Documentation

Version 1.0

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CHWOne

Table of Contents

1. Overview	3
2. Grant Wizard Workflow	4
3. Step-by-Step Guide	5
3.1 Step 1: Upload & Basic Information	5
3.2 Step 2: Entity Details	6
3.3 Step 3: Data Collection	7
3.4 Step 4: Project Planning	8
3.5 Step 5: Review & Submit	9
4. Collaborations Integration	10
5. Form & Dashboard Generation	11
6. Data Flow Architecture	12

1. Overview

The CHWOne Grant Wizard is an AI-powered tool that streamlines the process of setting up grant collaboration projects. It automatically extracts information from grant documents, identifies collaborating entities, defines data collection requirements, and creates project milestones.

Key Features

- AI-Powered Document Analysis: Upload a PDF grant document and let AI extract all relevant information
- Entity Management: Track all collaborating organizations and their roles
- Data Collection Planning: Define methods, frequencies, and responsible parties
- Milestone Tracking: Create project timelines with dependencies
- Form Generation: Automatically create data collection forms
- Dashboard Generation: Build real-time reporting dashboards
- Collaboration View: Unified view of all grant partnerships

2. Grant Wizard Workflow

The Grant Wizard follows a 5-step process to set up grant collaboration projects:



Workflow Summary

1. Upload grant document or enter information manually
2. Define collaborating entities and their roles
3. Set up data collection methods and frequencies
4. Create project milestones and timeline
5. Review and submit to create the collaboration

3. Step-by-Step Guide

3.1 Step 1: Upload & Basic Information

Purpose: Upload grant documents and enter basic grant information.

Actions:

- Navigate to /grants page
- Click "Launch Grant Analyzer" button
- Upload a PDF grant document OR click "Prepopulate Form with Sample Data"
- AI automatically extracts: Grant title, Description, Funding source, Budget, Dates

Step 1: Upload & Info

Drop PDF here or click to upload

Grant Title: [Memorandum of Understanding (MOU)]

Description: [Collaborative agreement between...]

Funding Source: [State Health Department]

Total Budget: [\$6,210]

3.2 Step 2: Entity Details

Purpose: Identify and manage collaborating organizations.

Entity Roles:

- Lead: Primary organization responsible for grant management
- Partner: Organizations actively participating in project delivery
- Evaluator: Organizations responsible for assessment and evaluation
- Stakeholder: Organizations with interest but limited active participation

Step 2: Entity Details

Collaborating Entities (3)

%% Fiesta Family Services, Inc. [LEAD]

% Contact: Maria Rodriguez

%% Responsibilities: Grant admin, Fiscal management

%% Women Leading [PARTNER]

%% Responsibilities: Training delivery

3.3 Step 3: Data Collection

Purpose: Define data collection methods and requirements.

Configuration Options:

- Collection frequency: Daily, Weekly, Monthly, Quarterly, Annually
- Responsible entity assignment
- Data points to collect
- Collection tools and instruments

Step 3: Data Collection

Data Collection Methods (4)

%% Participant Intake Tracking [Monthly]

% Responsible: Fiesta Family Services

% Data Points: Demographics, Contact Info, Consent

%% Tools: Custom Forms, Client Management System

%% Training Session Attendance [Weekly]

%% Responsible: Women Leading

3.4 Step 4: Project Planning

Purpose: Create project milestones and timeline.

Milestone Configuration:

- Set milestone name and description
- Assign due dates
- Assign responsible parties
- Define dependencies between milestones

Step 4: Project Planning

Project Milestones (6)

Timeline: Jan 2025 % % % % % % % % % % % % % % % % % % Dec 2026

% | Project Kickoff

Due: Jan 15, 2025

% | Staff Training Complete

Due: Feb 28, 2025

% | Program Launch

Due: Mar 15, 2025

% | Q2 Progress Report

Due: Jun 30, 2025

% | Mid-Year Review

Due: Jul 31, 2025

% | Final Report

Due: Dec 15, 2026

3.5 Step 5: Review & Submit

Purpose: Review all information and submit the grant.

Review Sections:

- Collaboration Model: Summary of all entities and their roles
- Data Collection Summary: Overview of collection methods
- Project Timeline: Visual milestone overview
- AI Recommendations: Suggested improvements

AI Recommendations Example

& HIGH: Establish joint steering committee with all partners
%E MEDIUM: Implement centralized data repository
%E MEDIUM: Schedule monthly progress reviews with stakeholders

Click "Complete & Process" to save the grant and create the collaboration.

4. Collaborations Integration

After completing the Grant Wizard, the grant appears on the Collaborations page (/collaborations). This provides a unified view of all grant partnerships.

Collaborations List View

Collaborations Page

Memorandum of Understanding (MOU) [draft]

The purpose of this MOU is to establish a collaborative...

Collaborating Organizations:

Fiesta Family Services [LEAD]

Women Leading [PARTNER]

Jan 2025 - Dec 2026

Progress: 25%

\$210 Funding

Collaboration Detail Tabs

- Documents: Download original grant and AI analysis report
- Forms & Data: Access generated data collection forms
- Datasets: View linked datasets for the collaboration
- AI Reports: Generate progress and funder reports
- Partners: View all collaborating organizations with contacts

5. Form & Dashboard Generation

Generate Forms

From the Grant Management page, click "Generate Forms" to automatically create data collection forms based on grant requirements.

- Participant Intake Form: Collect participant demographics and consent
- Service Tracking Forms: Track activities per data collection method
- Progress Report Form: Monthly/quarterly reporting

Generate AI Dashboard

Click "Generate Dashboard" to create a real-time tracking dashboard with:

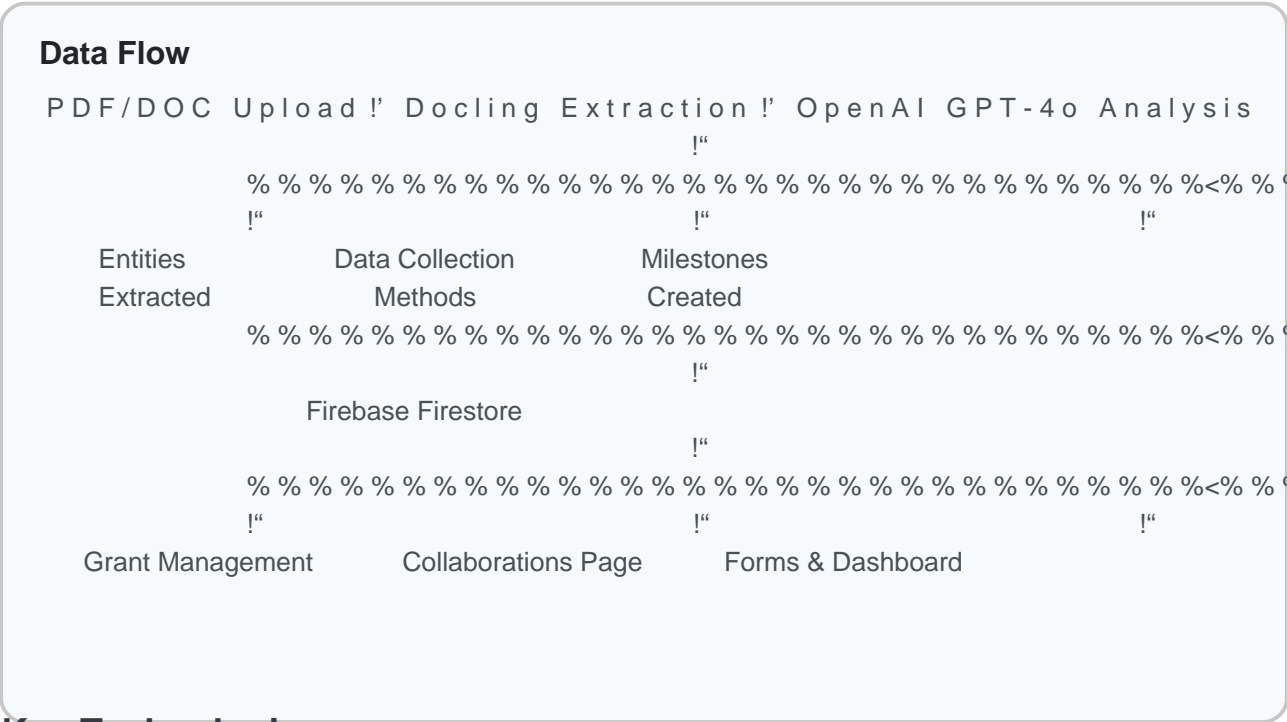
- KPI Metrics: Total Participants, Budget Utilization, Milestone Progress, Reports Submitted
- Charts: Line chart for enrollment, Pie chart for services, Bar chart for activities
- Data Tables: Recent activities with filtering and sorting

Dashboard KPIs Preview

0	0%	0/6	0/4
Particip.	Budget	Milestone	Reports
Target:	Utilized	Progress	Submitted
100	\$6,210		

6. Data Flow Architecture

The following diagram shows how data flows through the Grant Wizard system:



Key Technologies

- Docling: IBM's document understanding library for PDF text extraction
- OpenAI GPT-4o: AI model for intelligent data extraction and analysis
- Firebase Firestore: NoSQL database for storing grant and collaboration data
- Next.js: React framework for the web application
- Material-UI: Component library for consistent UI design

Summary

The Grant Wizard and Collaborations integration provides a complete workflow for managing grant collaboration projects:

- 1. Document Upload & AI Analysis - Extract grant information automatically
- 2. Entity Management - Track all collaborating organizations
- 3. Data Collection Planning - Define what data to collect and how
- 4. Project Planning - Create milestones and timelines
- 5. Form Generation - Create data collection forms automatically
- 6. Dashboard Generation - Build real-time reporting dashboards
- 7. Collaboration Tracking - Monitor progress across all partners

Benefits

- ' Reduces grant setup time from hours to minutes
- ' Ensures no critical information is missed
- ' Creates actionable project plans automatically
- ' Generates data collection tools immediately
- ' Provides real-time performance tracking
- ' All components are interconnected and validated