Online Grant Application and Reporting Instructions

<u>Returning users:</u> log on to the system using your e-mail address and the password. Please do not create a second, new user account. (There is a system prompt to assist if you need a password reminder.)

<u>New users:</u> please register by clicking "Create New Account" on the Log In page. If your organization has previously applied using this process, please add yourself to their existing account.

<u>Important tip: Please bookmark the log-in page website address!</u>

<u>The Registration Process:</u>
The registration process has four sections: (1) organization information, (2) your individual user information, (3) executive officer information, and (4) choosing your individual user password.

- During the registration process, you cannot save partial information; therefore, you should gather all required information before beginning the registration process.

- Your user account ID is your e-mail address.

<u>Updating Your Registration Information:</u>
To update your user information, click on your name at the top right corner of the screen and select "Edit Profile" from the drop-down menu. To update your organization information click on the "pencil" icon in the Organization section on your Dashboard page.

<u>The Application Page:</u>
After you have registered, you will be directed to the Application Page. On the top bar of the screen you will see a few option:
- <u>The "Home" icon – This is your Dashboard</u> – This screen is your homepage where you can check the status of your grants. This page will display the form you just completed, the status of the form, and the next form in the process.
- <u>Apply</u> – (Application Page) This screen lists the available grants and is the portal to apply.
- <u>Fax to File</u> – See "Uploading Files" section below

<u>Navigating the Online Grant Management System:</u>
- Apply for a grant by clicking "Apply" at the top of the screen
- Manage your grant application(s) by clicking on the "Home" icon at the top of the screen. The Dashboard Page provides information regarding the status of open grant applications. From this page, you can download completed application forms and see the status of an application form you have submitted. If you have saved but not submitted an application form, you must access the form on this page to complete and submit the form.
- Manage your awarded grants by clicking the "Home" icon at the top of the screen. The Dashboard Page provides information regarding awarded grants. From this page, you can see whether or not a grant has been awarded and complete required follow-up forms for awarded grants. The term "follow-up" describes an upcoming or pending event such as a report that is due or an upcoming meeting, initiated by your foundation.

<u>Uploading Files:</u>
- In general, the acceptable file types for uploading files are: Microsoft Word/Excel and Adobe PDF (PDF) files. You can define which file types are allowable if you like.
- Only one file can be uploaded per question. Multiple documents must be combined into one file and then uploaded.
- If the document(s) that need to be attached to your form are not electronic or you need to combine multiple documents into a single file, our online system gives you the option to "Fax to File." The easy-to-

use tool will convert documents from hard copy to digital format as a PDF file.

1. Click "Fax to File" in the menu at the left side of the screen and read the instructions.
2. Select "Request a Fax #"; a toll-free number will appear on the page.
3. Load a document, or multiple documents that need to be consolidated into one file, into your fax machine.
4. Dial the toll-free number. Send a separate fax for each individual file you wish.

Online System Tips:

- The character counter includes spaces as well as characters.
- A user will be automatically logged out of the online system after 90 minutes of inactivity. (The user will receive a warning message at 80 minutes of the pending time out.)
- The system auto-saves after every 100 characters typed or every time you click into a new question.
- You may choose to prepare your response in a document outside of the online system (e.g. Microsoft Word) and then copy and paste the text into the online form. If you prepare your application in this way, be sure to keep track of character limits. As noted above, character limits include spaces and characters. We recommend that you do not use formatting tools, as available in Microsoft Word, because the formatting will likely not transfer to the response area when pasted into the online system.
- It is advisable to download copies of all submitted forms to your computer via the Application Packet at the top of your form.
- If you do not provide an answer for one of the required questions, you will not be able to submit your application.
- If your PDF upload file exceeds the maximum file size, consider using the Adobe Acrobat option to 'Reduce File Size' (look at the options in Document).
- Remember to click "Submit Form" when you are finished. Clicking "Save" will allow you to continue to work on your form.
- Once your application has been submitted it is no longer available for editing. If you need to make a correction to a submitted form, contact us directly.