Applicant Tutorial

Overview

This document is designed to provide grant applicants with instructions for use of the Foundant Grant Lifecycle Manager application. Remember while this document attempts to provide step-by-step instructions, we realize that not all user scenarios may be adequately covered. If you remain on a page with inactivity for longer than 90 minutes, you will be logged off for security reasons. Please save every 15-25 minutes.

Registration Page

If you already have an account with this Foundant Grant Lifecycle Manager;

1. Enter your login, which is your e-mail address, in the Email Address field

2. Enter the Password that you chose when you set up your account.

3. Press the "Log On" button to enter the Grant Lifecycle Manager.
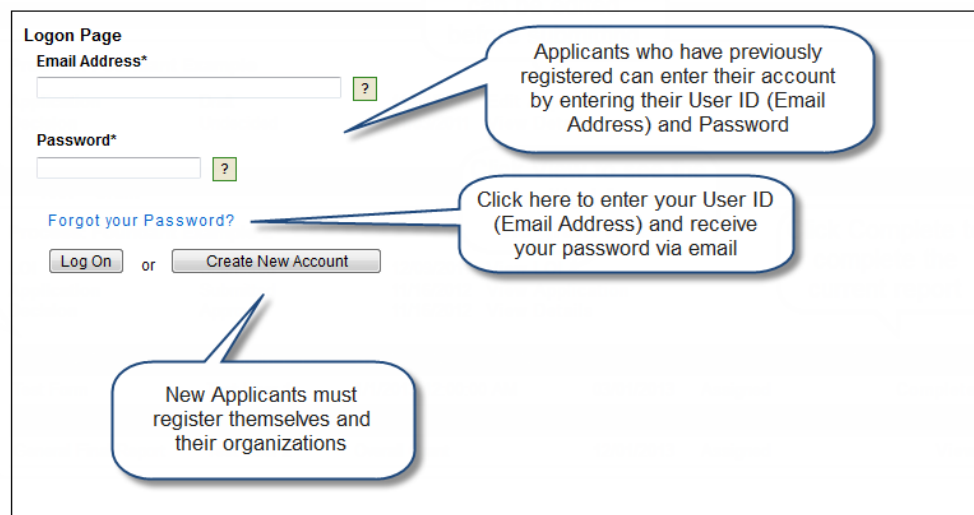
If you have forgotten your password;

4. You can click on the Forgot your Password link, enter your User ID, and the system will email your password to your e-mail account.

If you do not have an existing account;

5. Click on Create New Account to register.

Applicant Tutorial
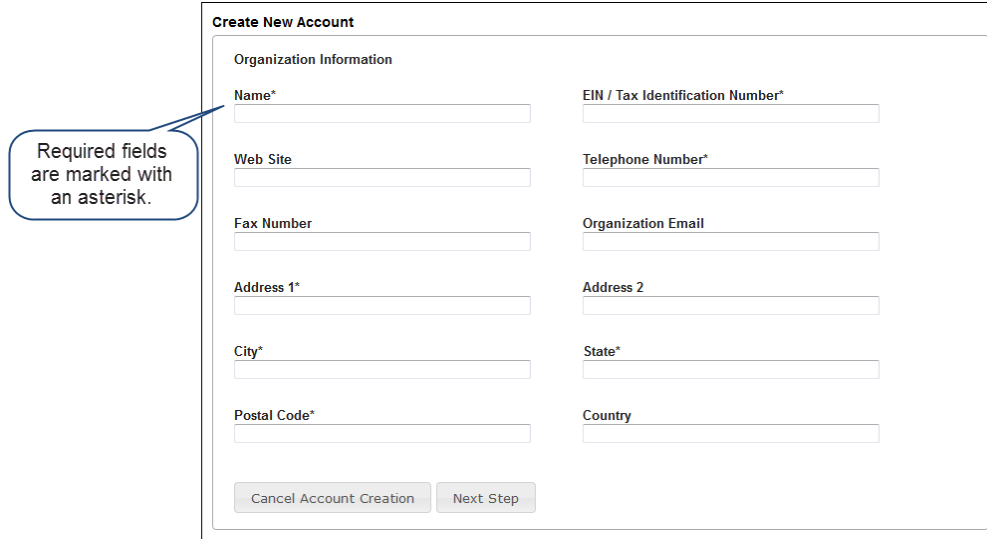
To register an account

1. Click on Create New Account

2. Enter your organization information

Create New Account

Organization Information

Required fields are marked with an asterisk.

Name*	EIN / Tax Identification Number*
Web Site	Telephone Number*
Fax Number	Organization Email
Address 1*	Address 2
City*	State*
Postal Code*	Country
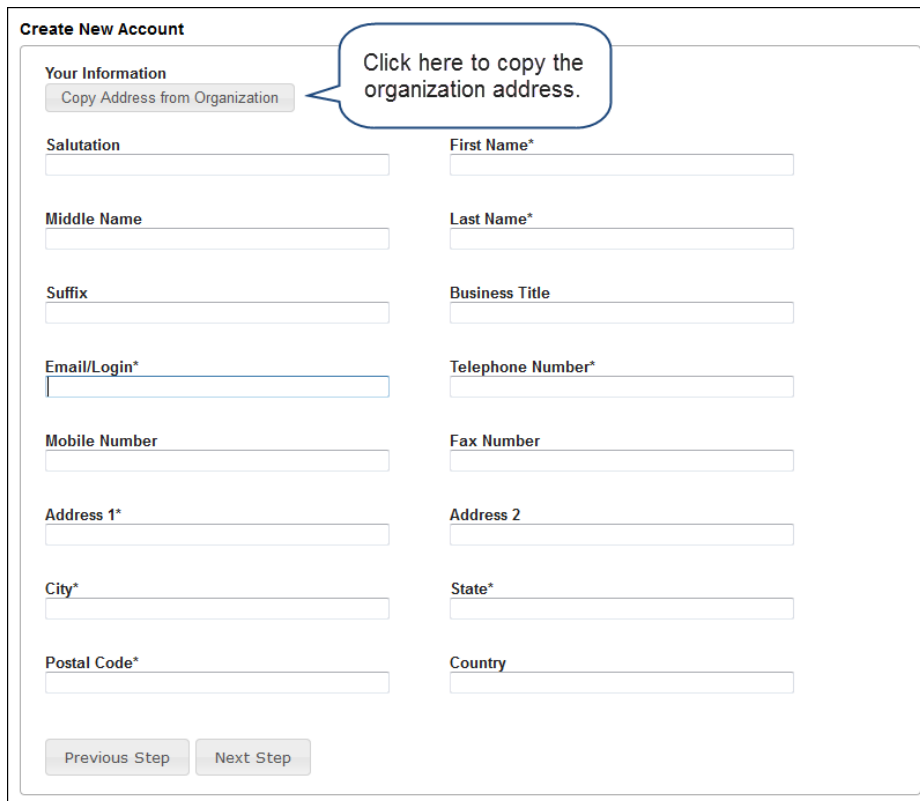
Cancel Account Creation   Next Step

3. Click on the Next Step button

4. Enter your contact information

Create New Account

Your Information

Copy Address from Organization

Click here to copy the organization address.

Salutation	First Name*
Middle Name	Last Name*
Suffix	Business Title
Email/Login*	Telephone Number*
Mobile Number	Fax Number
Address 1*	Address 2
City*	State*
Postal Code*	Country

Previous Step   Next Step

5. Click on the Next Step button

6. Indicate whether or not you are the organization's executive

Create New Account

Executive Officer

Are you the Organization's Executive Officer?*
○ Yes
○ No

Previous Step | Next Step

7. Click on the Next Step button

8. Enter the organization executive information

Create New Account

Additional Executive Officer Information
Copy Address from Organization

> Click here to copy the organization address.

Salutation	First Name*
Middle Name	Last Name*
Suffix	Business Title
Email*	Telephone Number
Mobile Number	Fax Number
Address 1	Address 2
City	State
Postal Code	Country

Previous Step | Next Step

9. Click on the Next Step button

10. Enter your password

Create New Account

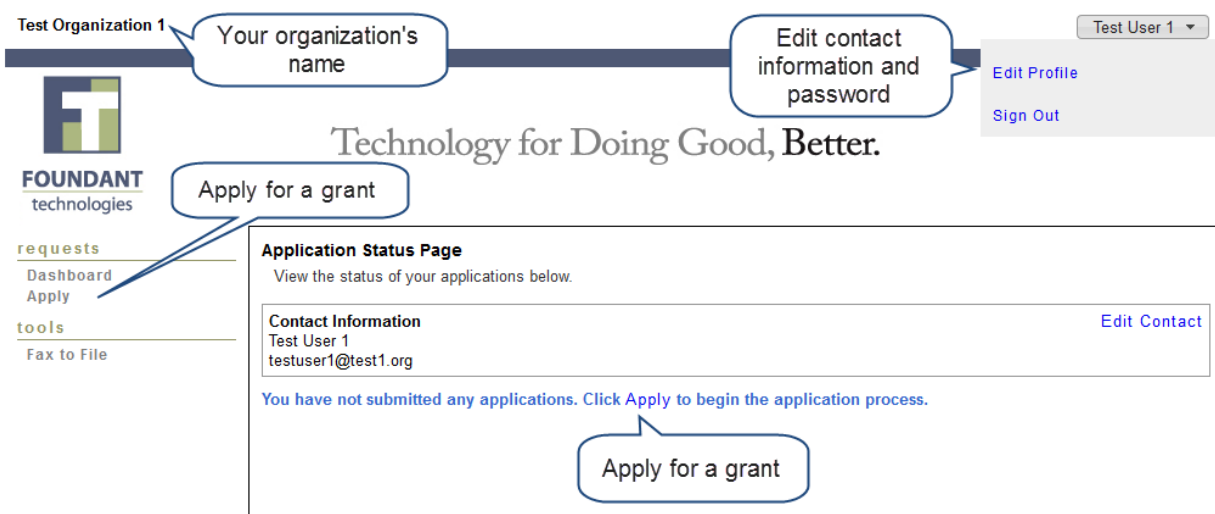**Password**

Password*

Confirm Password*

[Previous Step] [Finish]

11. Click on the Finish button

Applicant Status Page

After you have registered your account you will be directed to the Application Page.

1. Apply – This allows you to review the available grants and apply.

2. Dashboard – This is your homepage where you can check on the status of your grants. This page will display the form you just filled out, what its status is, and what the next form will be.

3. Fax to File – Instead of scanning a document you can fax it to your computer. Using Fax to File helps shrink documents to a smaller file size.

Choosing a Grant Program

After clicking on the Apply link you will have the ability to choose a grant program to apply for. Each grant program will have a brief description of the grant or who qualifies for the grant. Read these descriptions thoroughly before applying.

1) Read through the grant program description to decide if you qualify to apply for the grant.

   a. If the foundation has sent you an access code enter it in the Access Code box on the left and click Enter. This will allow your private grant program to appear.

2) After the grant program appears, click it to start filling out the first form.

   a. Grant Programs have the ability for multiple forms. Some grant programs can have the applicant submit 3 forms to the foundation before a decision is made. Each form will be filled out and submitted to the foundation. After it is deemed complete, the foundation will approve you to move on to the next form.
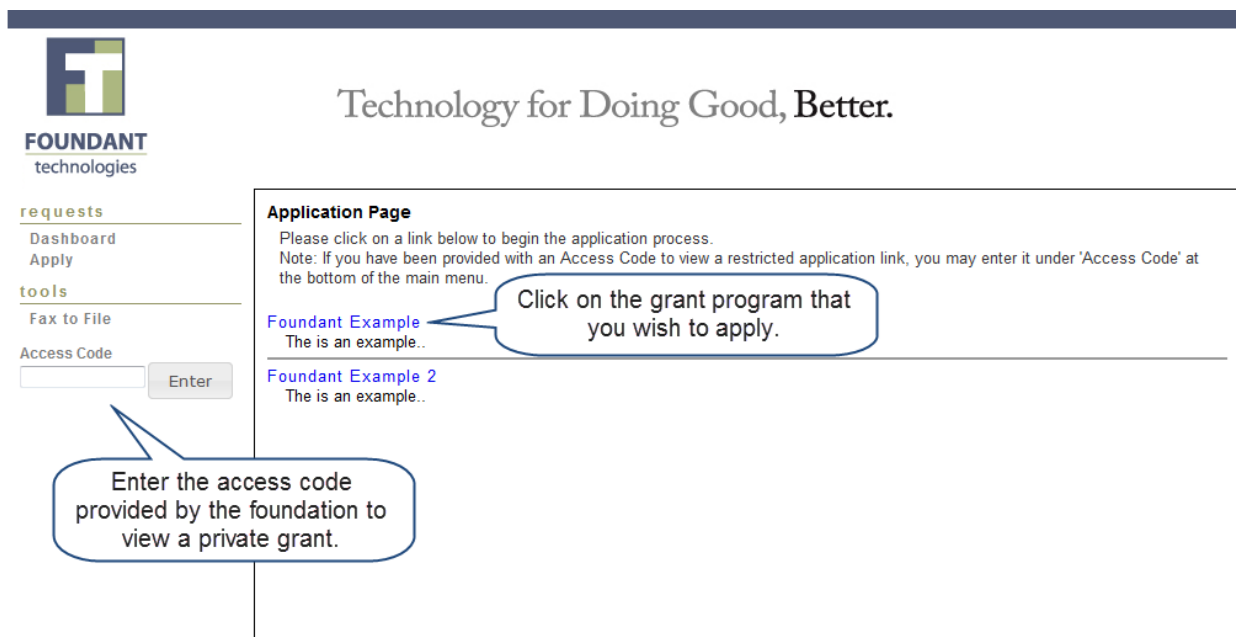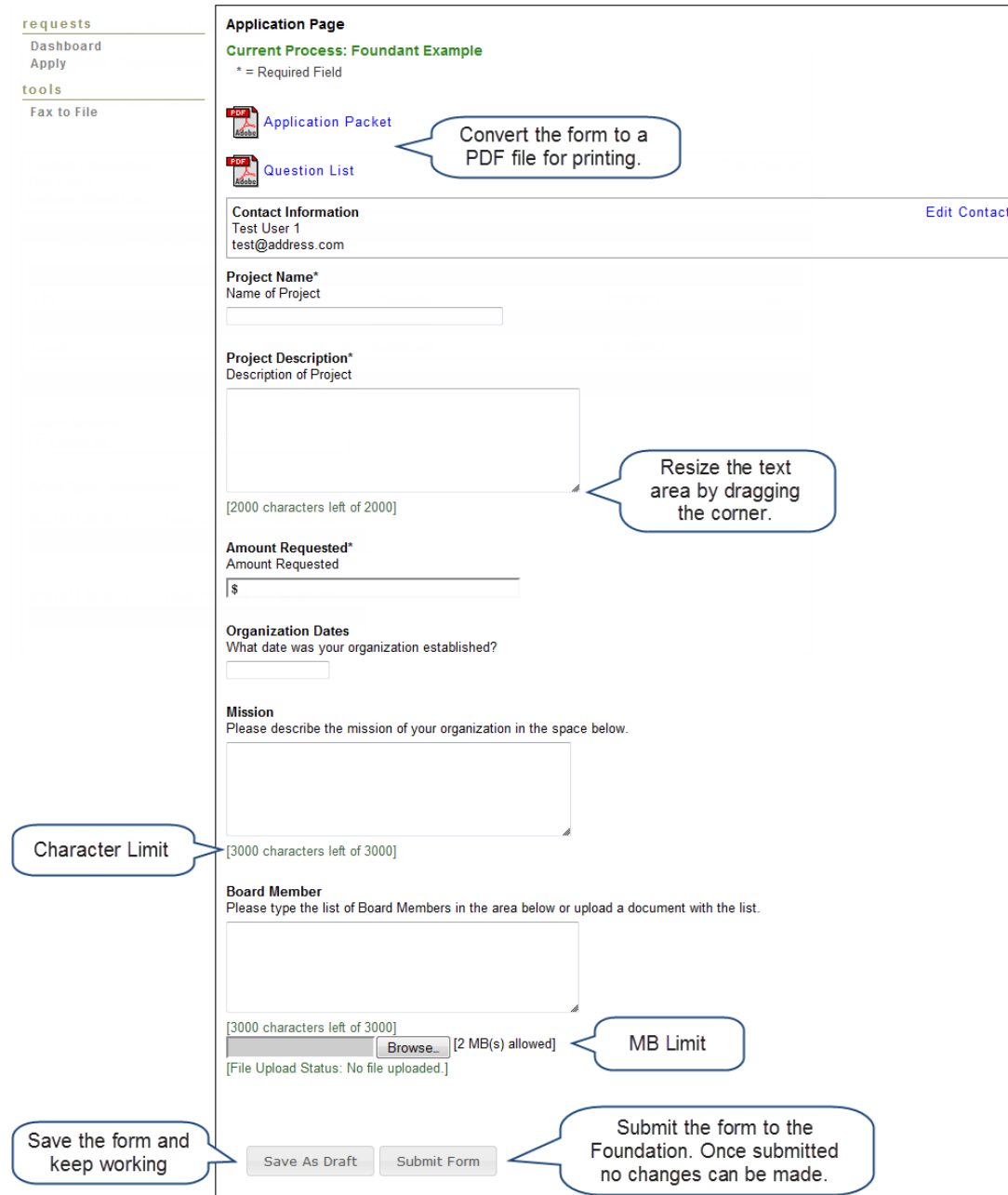

Filling out the First Form

After agreeing to the applicant instructions you will be sent to the first form in the grant program. Enter all the applicable information then Save as Draft or Submit the form to the foundation.

1) Start filling out the questions on the form, paying close attention to the instructions and limitations on each question.

   a. Certain types of questions have limitations set by the foundations. Text questions will have a character limit which only allows you to type or paste a certain amount of text in each question. Another limit will be on the file upload questions. This limit will be in

Mega Bytes (MB). The size of file you are uploading must be under the amount of MB's allowed on the question.

2) Applicants can save as draft and come back to the form after any given time to complete it. The foundation will not check for completeness until the form is submitted.

a. After the application is submitted there will be a confirmation page stating that the form has been submitted. You can always refer to your Application Status Page to see what stage the application is in, if in doubt.

Accessing Forms After Save and Submit

The Application Status Page is where you can check on the status of your applications and access for historical record keeping. The Application Status Page is your homepage. You will be automatically directed there when you login.

1. If you've submitted the grant then you can only view the grant request and print it.

2. If you saved the form then you can Edit the saved form from the Application Status Page.

requests
Dashboard
Apply

tools
Fax to File

Application Status Page
View the status of your applications below.

Contact Information   Edit Contact
Test User 1
testuser1@test1.org

Saved form that can be edited before submitting

Click the top bar to collapse the details of the request

Process: Foundant Example

| Application | Draft | 11/03/2011 | Edit Application |
| Decision | Undecided | 11/03/2011 | View Details |

Click View to see the submitted form or the grant details

▼ Test - Grant

Process: Foundant Example 2

LOI	Submitted	12/09/2011	View LOI
Application	Submitted	11/16/2012	View Application
Decision	Approved	11/16/2012	View Details

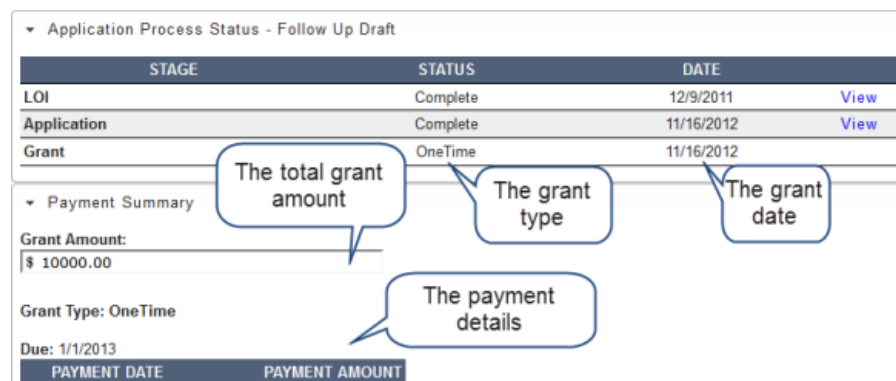*Click Complete to complete the current report*

An approved grant with follow up reports assigned. Only current and past reports can be viewed.

FORM NAME	ASSIGNED TO	GRANT / INSTALLMENT	DUE DATE	STATUS	COMPLETE / VIEW
Test Form	Test User 1	Overall Grant	03/01/2013	Assigned	Complete
Test Form	Test User 1	Overall Grant	07/01/2013	Assigned	Complete
General Final Report	Test User 2	Overall Grant	12/01/2013	Assigned	View

Viewing Decision Details

The Decision Details Page is where you can view the details of your grant and scheduled payments.

1. If the request is Undecided there will be no Payment Summary.

2. If the request is Denied the Grant Amount will be $0.00 and the Grant Type will be Denied.

▼ Application Process Status - Follow Up Draft

STAGE	STATUS	DATE	
LOI	Complete	12/9/2011	View
Application	Complete	11/16/2012	View
Grant	OneTime	11/16/2012	

The total grant amount

The grant type

The grant date

▼ Payment Summary

Grant Amount:
$ 10000.00

The payment details

Grant Type: OneTime

Due: 1/1/2013

PAYMENT DATE	PAYMENT AMOUNT