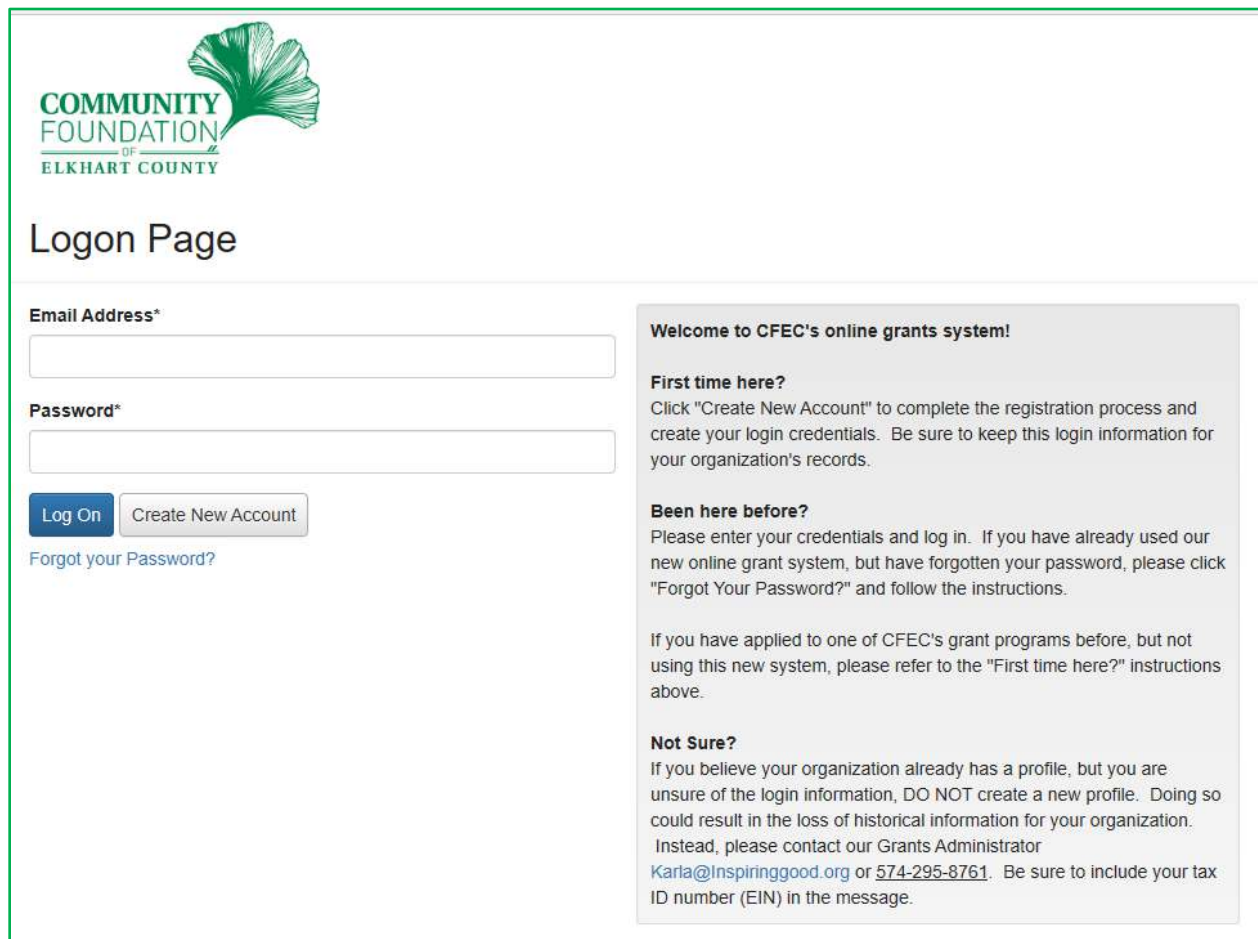


# Grant Applicant Tutorial

## Site Access & Account Creation

You will access the system via the log in – Grants link on our website. It is recommended you bookmark this page in your internet browser for ease of access. If you’ve already created an account, you may enter your email and password and log right in. Otherwise you will want to click on the Create New Account button. If at any time after creating an account, you can’t remember your password, you may click on the Forgot Your Password button, enter your email address, and you will be sent a link to resent your password.



The screenshot shows the 'Logon Page' for the Community Foundation of Elkhart County. At the top left is the CFEC logo, which features a green fan-shaped graphic and the text 'COMMUNITY FOUNDATION OF ELKHART COUNTY'. Below the logo is the title 'Logon Page'. The page contains two input fields: 'Email Address\*' and 'Password\*'. Below these fields are two buttons: 'Log On' (in a blue box) and 'Create New Account' (in a grey box). A link for 'Forgot your Password?' is located below the 'Log On' button. On the right side of the page, there is a grey box with the following text:

**Welcome to CFEC's online grants system!**

**First time here?**  
Click "Create New Account" to complete the registration process and create your login credentials. Be sure to keep this login information for your organization's records.

**Been here before?**  
Please enter your credentials and log in. If you have already used our new online grant system, but have forgotten your password, please click "Forgot Your Password?" and follow the instructions.

If you have applied to one of CFEC's grant programs before, but not using this new system, please refer to the "First time here?" instructions above.

**Not Sure?**  
If you believe your organization already has a profile, but you are unsure of the login information, DO NOT create a new profile. Doing so could result in the loss of historical information for your organization. Instead, please contact our Grants Administrator [Karla@Inspiringgood.org](mailto:Karla@Inspiringgood.org) or [574-295-8761](tel:574-295-8761). Be sure to include your tax ID number (EIN) in the message.

### CREATE NEW ACCOUNT:

- Creating a new account is a multi-step process
  - with the first section collecting **Organization Information**;
  - the second section collecting **User Information**;
  - and sections three and four collecting **Executive Officer** information.
- After Organization Information has been entered click on the “**Next**” button.
- The next section is the “**User Information**” section, or YOUR information.

- If your address is the same as your organization's you may use the **"Copy Address from Organization"** button to automatically pull the address information from the organization address fields into the address fields in this section.
- It is very important to note that the email address entered in the **Email/Username** field becomes the Applicant's **Username** in the system.
- Once the fields on the **"User Information"** section are completed, click on the **"Next"** button.
  - Please note that should you need to navigate to previous section in the registration process, you must use the **"Previous"** button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using the browser **"back"** button you will lose all registration information entered.
- In the next section you indicate if you are the Organization's Executive Officer.
  - If you are the executive officer, select **"Yes."** You are taken to a section of optional fields that includes only the fields that were not required in the **"User Information"** section.
  - If you are not the executive officer, select **"No,"** and complete the required Executive Officer fields.
- Once the Executive Officer's information is entered, click on the **"Next"** button to create a password.
- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.
- Once the password is created, the applicant clicks the **"Create Account"** button.

Password

Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#\$%&\*()\_

Password\* Confirm Password\*

**EMAIL CONFIRMATION:**

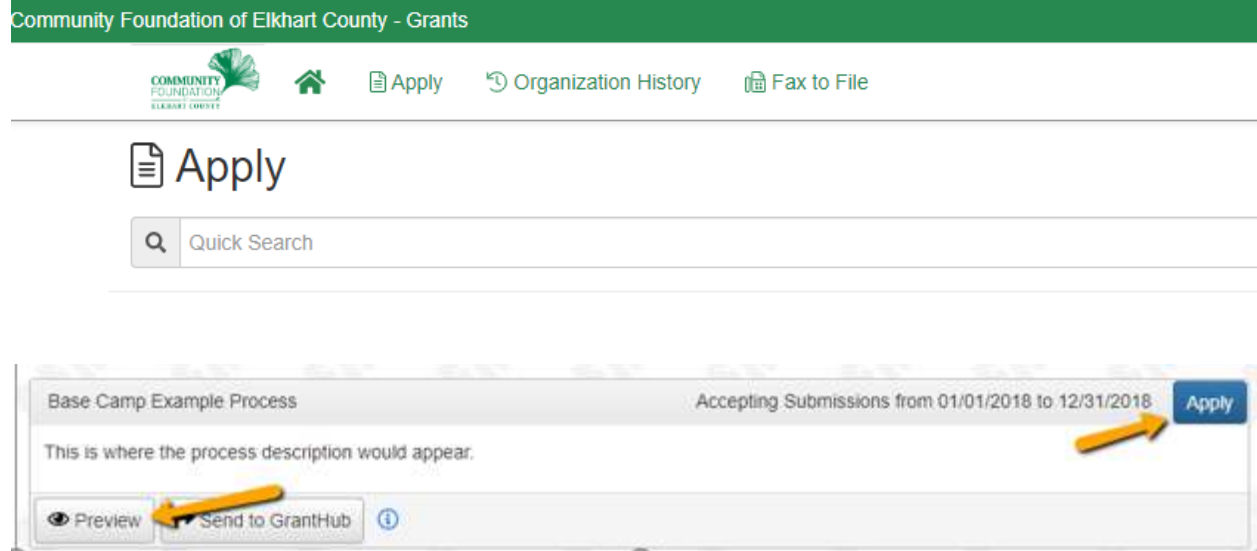
Upon clicking Create Account you will be taken to the Email Confirmation page, you will be able to confirm you are receiving emails from the system. Follow the onscreen instructions and click the "Continue" button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

**Applying for Funding**

Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them.

- You can preview the application without having to save any work by clicking on the "Preview" button.

- To start a request, click on the blue **“Apply”** button under the opportunity you’d like to apply to.
  - Clicking Apply will take you into a form to complete and submit. Depending on the Foundation the form will likely be an LOI or Application. In this example, you are taken directly into the application.



Once in the form, note that your contact and organization information automatically populates at the top of the form.


- You may update your contact information and view your email history.
  - To update Organization information contact [Karla@Inspiringgood.org](mailto:Karla@Inspiringgood.org).
- If you’d like a PDF copy of the application, you can click the Question List button.
- Once you’ve completed the form, you may click the Application Packet button to download a copy of the questions and your responses.

Work your way through the form responding to the fields.

- Note any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you’ve finished all of the questions in the group, as an indicator to yourself that you’ve completed that section and reduce scrolling.
- Some fields have character limits.
  - Responses that are longer than the set limit will be saved, **but** an error message will appear informing the applicant the limit has been exceeded.
    - You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.
- File **upload fields** will only accept one file, per field.
  - Upload fields have size limits.
    - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing the applicant that the file is too large and the file **will not** be saved.
  - Upload fields may also have File Type restrictions.



▾ Fall Grant For Book Funding  
**Process:** Base Camp Example Process  
 Application            Draft            07/24/2018            [Edit Application](#)  
 Decision                Undecided



- You may continue working on saved forms by clicking the edit option next to the form.
- You may view forms which have been submitted but note once submitted you can not edit them.
- You can also see the request’s decision status.
  - The status will be “Undecided” until the site administrator posts a decision.
    - Timing on decision status updates vary depending on the foundation.

If your request is approved you may be assigned Follow Up Reports to be completed and submitted through the system.

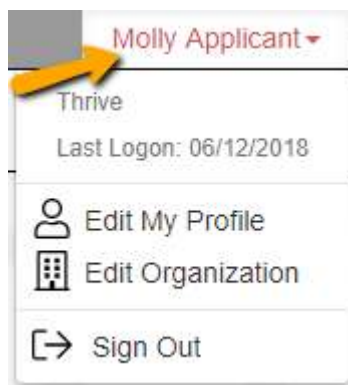
- Follow ups are completed and submitted just like any other form.
- If you’ve been assigned multiple follow up forms, you must complete them sequentially by due date.
- Follow ups which are past due will be marked as such.
  - If the past due message is reflected in orange, you may still submit the form.
  - If the past due message is reflected in red, you no longer have the option to submit the form.

**Follow Up Forms**

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Award Agreement	Molly Applicant	Overall Award	05/31/2018	Past Due	<a href="#">Edit</a>

Denied requests and requests marked closed by the site administrator are housed in the Historical Request tab.

If you wish to edit your account information or change your password, click your name in the top right. This will expand a drop-down menu. If you click Edit my profile, you will be able to update your user information or change your password. Be sure to click save in the bottom right once you’ve finished.

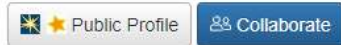


Molly Applicant ▾  
 Thrive  
 Last Logon: 06/12/2018  
 Edit My Profile  
 Edit Organization  
 Sign Out

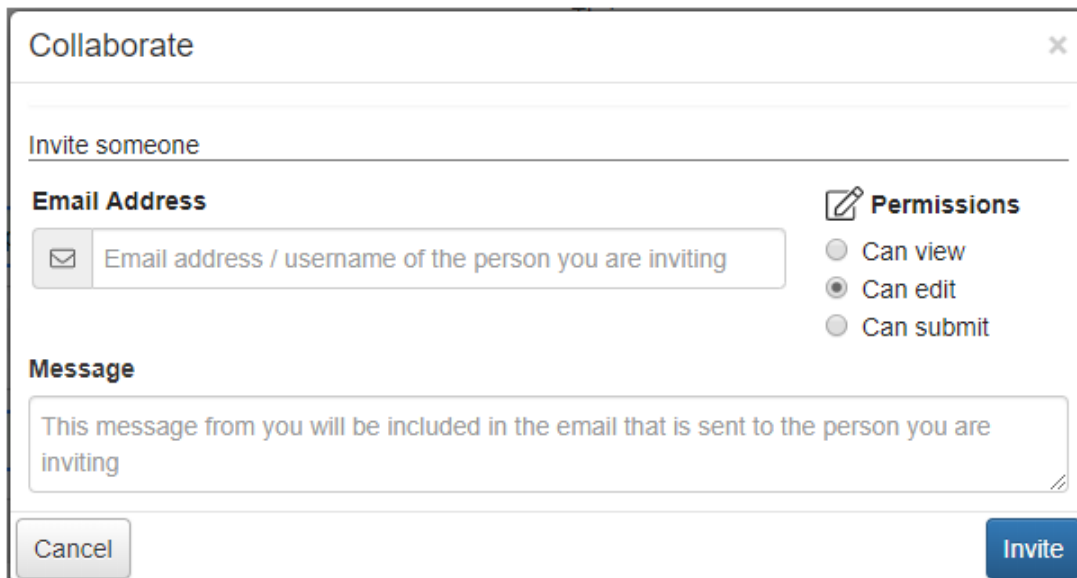
Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending “time out”).

# Collaborate Instructions

The Collaborator feature allows applicants to work together on a single request. Once you have started a request you will see the **Collaborate Button** at the top right side of the page. This can be used to invite other people to review your application.



- From the Collaborate pop up, enter the email address of the person you would like to invite
- Set the Permission you would like the collaborator to hav, either View, Edit, or Submit.
- And lastly, include a message and select Invite.

A screenshot of a "Collaborate" pop-up window. The window has a title bar with "Collaborate" and a close button. Below the title bar is a section titled "Invite someone". Under this section, there are three main areas: "Email Address" with a text input field containing the placeholder "Email address / username of the person you are inviting"; "Permissions" with three radio button options: "Can view", "Can edit" (which is selected), and "Can submit"; and "Message" with a text area containing the placeholder "This message from you will be included in the email that is sent to the person you are inviting". At the bottom of the form are two buttons: "Cancel" on the left and "Invite" on the right.

An email will be sent to the collaborator containing your message, their username, and a link to the login page. After clicking this link the collaborator will be brought to the login page. If this is their first time logging into the system, they will be asked to create a password.

After logging into the system, the collaborator will see your application under the Collaboration Requests tab of their Applicant Dashboard. Here they can select the edit form link and start collaborating on the document. The collaborator will have access to all forms within the request.