

Applicant – Online Application Training Document

Registration Page

If you already have an account with the Community Foundation’s Grant Management System;

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

1. Enter the Password that you chose when you set up your account.
2. Press the “Log On” button to enter the Grant Management System.

If you have forgotten your password;

3. 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;

4. Click on Create New Account to register.



Technology for Doing Good, Better.

A screenshot of the 'Logon Page' from the Foundant Technologies system. The page includes a title 'Logon Page', an 'Email Address*' field with a help icon, a 'Password*' field with a help icon, a 'Forgot your Password?' link, and two buttons: 'Log On' and 'Create New Account'. Three callout boxes provide instructions: one pointing to the Email Address field stating that previously registered users can log in with their email and password; one pointing to the 'Forgot your Password?' link stating that users can click here to enter their User ID (Email Address) and receive their password via email; and one pointing to the 'Create New Account' button stating that new applicants must register themselves and their organizations.

Logon Page

Email Address* ?

Password* ?

[Forgot your Password?](#)

or

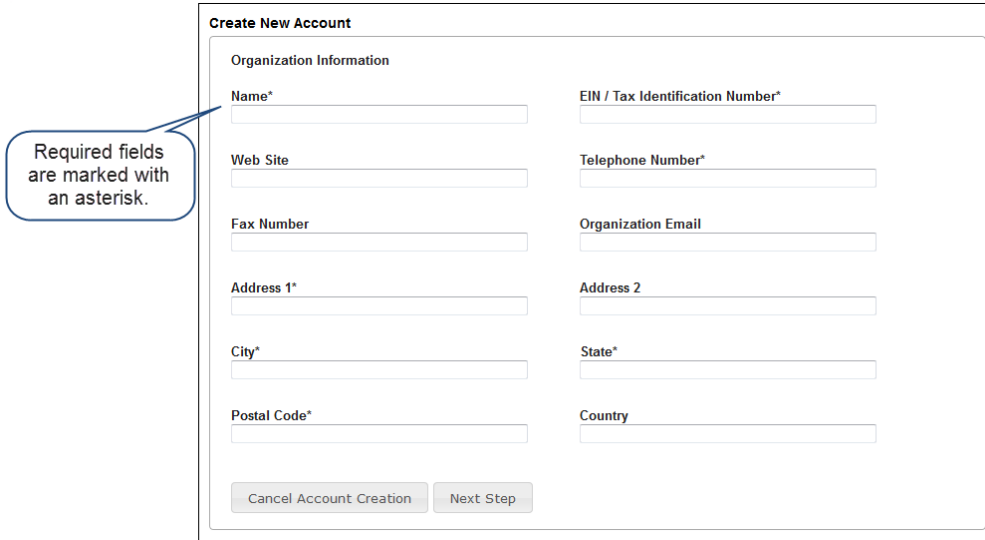
Applicants who have previously registered can enter their account by entering their User ID (Email Address) and Password

Click here to enter your User ID (Email Address) and receive your password via email

New Applicants must register themselves and their organizations

To register an account

1. Click on Create New Account
2. Enter your organization information



Create New Account

Organization Information

Name* EIN / Tax Identification Number*

Web Site Telephone Number*

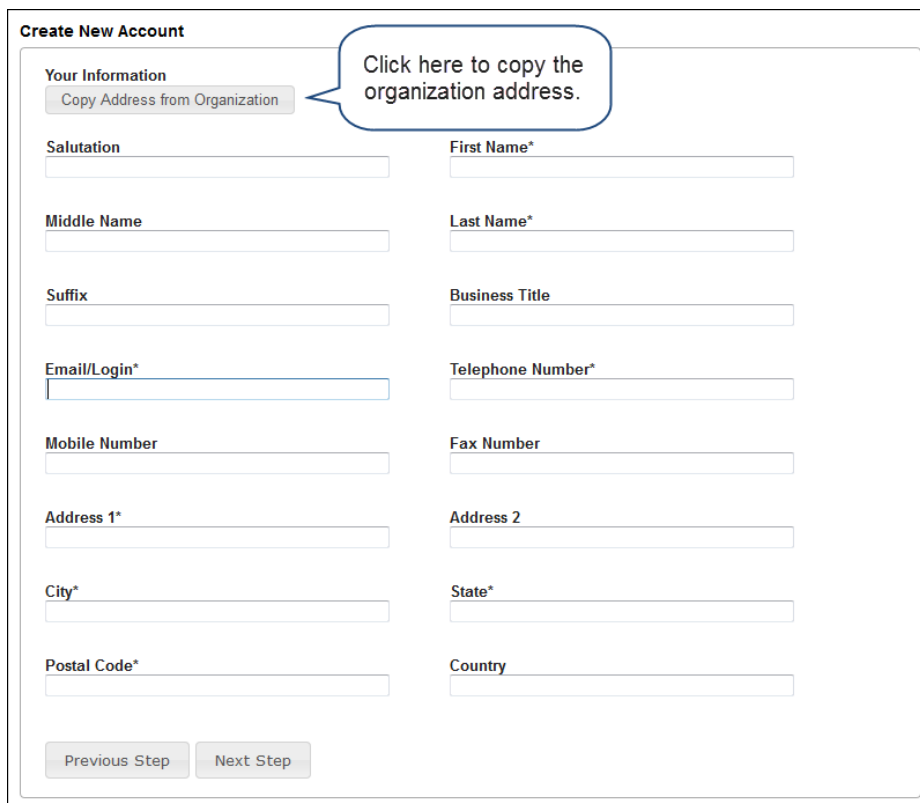
Fax Number Organization Email

Address 1* Address 2

City* State*

Postal Code* Country

3. Click on the Next Step button
4. Enter your contact information



Create New Account

Your Information

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

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

7. Click on the Next Step button
8. Enter the organization executive information

Create New Account

Additional Executive Officer Information

Click here to copy the organization address.

Salutation	First Name*
<input type="text"/>	<input type="text"/>
Middle Name	Last Name*
<input type="text"/>	<input type="text"/>
Suffix	Business Title
<input type="text"/>	<input type="text"/>
Email*	Telephone Number
<input type="text"/>	<input type="text"/>
Mobile Number	Fax Number
<input type="text"/>	<input type="text"/>
Address 1	Address 2
<input type="text"/>	<input type="text"/>
City	State
<input type="text"/>	<input type="text"/>
Postal Code	Country
<input type="text"/>	<input type="text"/>

9. Click on the Next Step button
10. Enter your password

Create New Account

Password

Password*

Confirm Password*

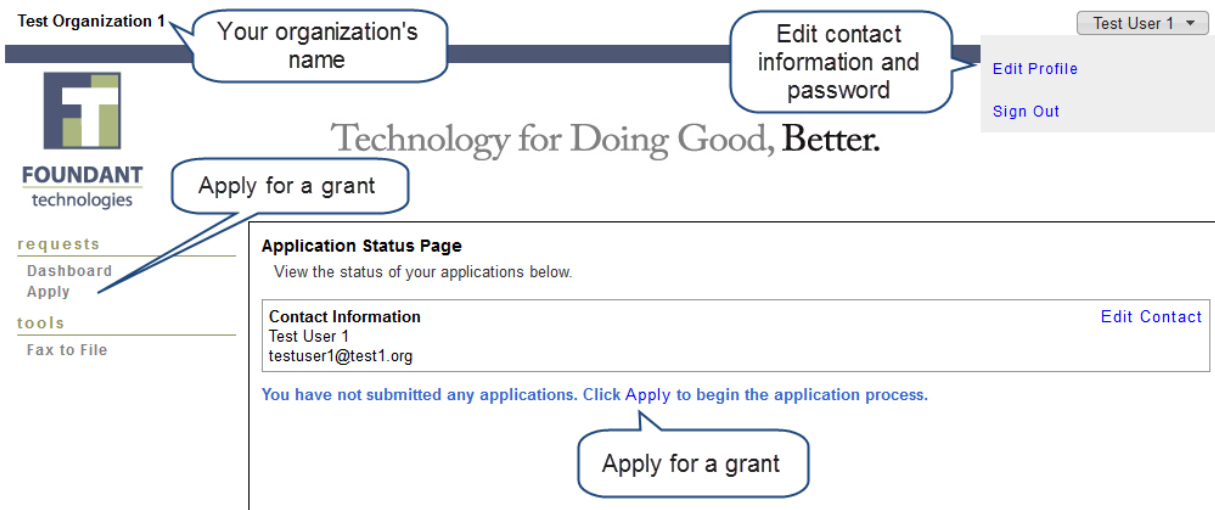
[Previous Step](#) [Finish](#)

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.



The screenshot shows the Applicant Status Page with several callouts:

- Test Organization 1**: A callout pointing to the organization name "Your organization's name".
- Edit contact information and password**: A callout pointing to the "Edit Profile" and "Sign Out" links in the user menu.
- Apply for a grant**: A callout pointing to the "Apply" link in the left sidebar.
- Apply for a grant**: A callout pointing to the "Apply for a grant" button at the bottom of the page.

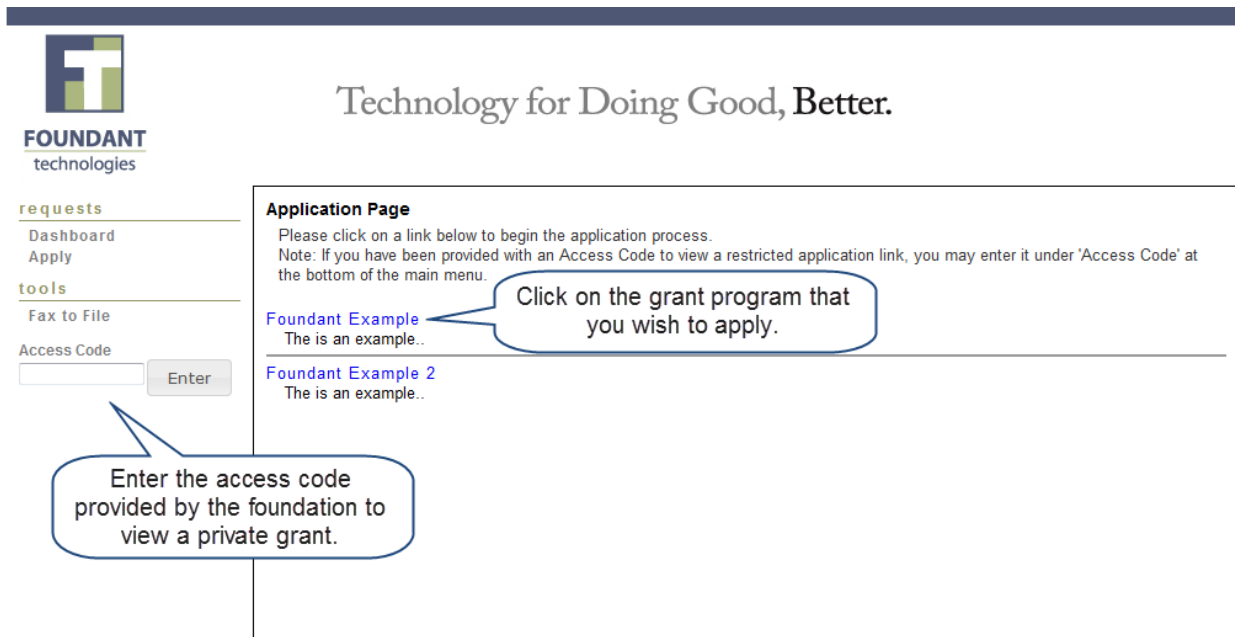
The page content includes:

- Header: "Test Organization 1", "Your organization's name", "Edit contact information and password", "Test User 1", "Edit Profile", "Sign Out".
- Logo: "FOUNDANT technologies".
- Slogan: "Technology for Doing Good, Better."
- Left Sidebar: "requests" (Dashboard, Apply), "tools" (Fax to File).
- Main Content: "Application Status Page", "View the status of your applications below.", "Contact Information" (Test User 1, testuser1@test1.org, Edit Contact), "You have not submitted any applications. Click Apply to begin the application process.", "Apply for a grant" button.

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.



The screenshot shows the FOUNDANT technologies website interface. On the left, there is a navigation menu with sections for 'requests' (Dashboard, Apply) and 'tools' (Fax to File, Access Code). The 'Access Code' field has an 'Enter' button. A callout bubble points to this field with the text: 'Enter the access code provided by the foundation to view a private grant.' The main content area is titled 'Application Page' and contains instructions: 'Please click on a link below to begin the application process. Note: If you have been provided with an Access Code to view a restricted application link, you may enter it under 'Access Code' at the bottom of the main menu.' Below this are two links: 'Foundant Example' and 'Foundant Example 2', both with the text 'The is an example..'. A callout bubble points to the 'Foundant Example' link with the text: 'Click on the grant program that you wish to apply.'

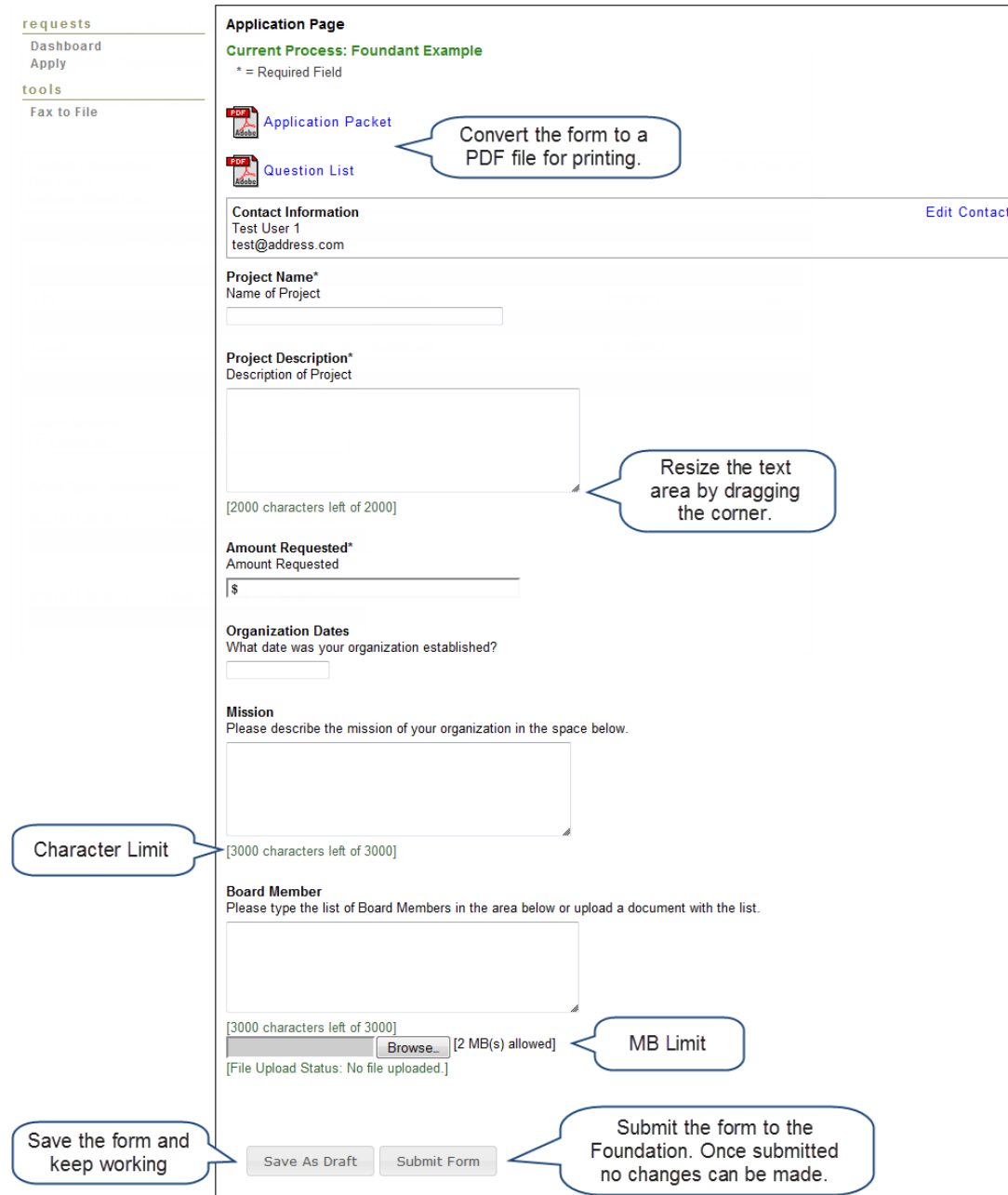
Filling out the First Form

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.




requests
Dashboard
Apply

tools
Fax to File

Application Page
Current Process: Foundant Example
* = Required Field

 [Application Packet](#) Convert the form to a PDF file for printing.

 [Question List](#)

Contact Information [Edit Contact](#)
Test User 1
test@address.com

Project Name*
Name of Project

Project Description*
Description of Project

[2000 characters left of 2000] Resize the text area by dragging the corner.

Amount Requested*
Amount Requested
\$

Organization Dates
What date was your organization established?

Mission
Please describe the mission of your organization in the space below.

[3000 characters left of 3000] Character Limit

Board Member
Please type the list of Board Members in the area below or upload a document with the list.

[3000 characters left of 3000] MB Limit

[2 MB(s) allowed]
[File Upload Status: No file uploaded.]

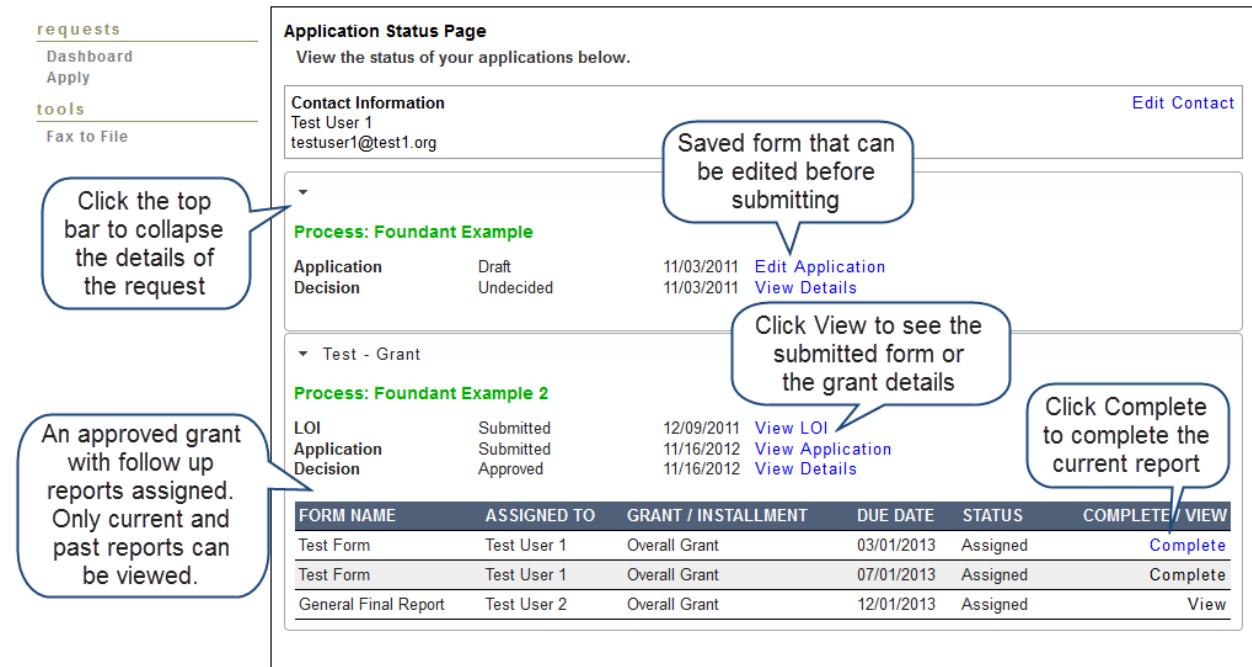
Submit the form to the Foundation. Once submitted no changes can be made.

Save the form and keep working

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
Test User 1
testuser1@test1.org [Edit Contact](#)

Process: Foundant Example

Application Decision Draft Undecided 11/03/2011 11/03/2011 [Edit Application](#) [View Details](#)

Test - Grant

Process: Foundant Example 2

LOI Application Decision Submitted Submitted Approved 12/09/2011 11/16/2012 11/16/2012 [View LOI](#) [View Application](#) [View Details](#)

Click the top bar to collapse the details of the request

Saved form that can be edited before submitting

Click View to see the submitted form or the grant details

Click Complete to complete the current report

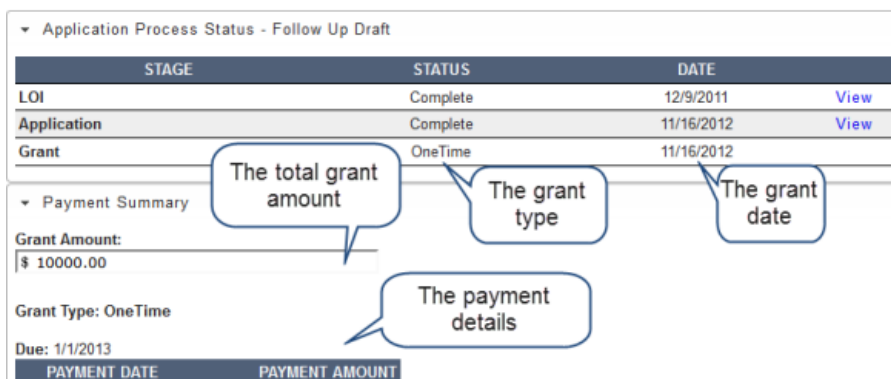
An approved grant with follow up reports assigned. Only current and past reports can be viewed.

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	

Payment Summary

Grant Amount: \$ 10000.00

Grant Type: OneTime

Due: 1/1/2013

PAYMENT DATE PAYMENT AMOUNT

The total grant amount

The grant type

The grant date

The payment details