This tutorial will outline the workflow a Staff Evaluator goes through.

Logging In

If you already have an account with the grant making organization;
1. Enter your e-mail address, in the e-mail address field
2. Enter the password you were given by the foundation.
3. Press the "Log On" button to enter the Grant Lifecycle Manager.

If you have forgotten your password;
4. Click the Forgot Your Password link
5. It will then ask for your email address. Type your email address and click Send Reminder.

If you do not have an existing account;
6. Contact your Foundation Administrator and they will be able to provide you with these details
STEP 1 Dashboard

After logging into the system, you will be directed to the Dashboard Page. This page displays the number of requests that have been assigned to you and allows you to access the application and evaluation.

- Click on the “Staff Evaluator” link to review a list of all the pending applications that have been assigned to you for review.

Step 2 Evaluate Assigned Applications

The Evaluation Workload Page displays a listing of the individual applications that have been assigned for you to review.

1. Evaluate each assigned application by clicking on the “Review” icon.
Staff Evaluator Workflow

Step 3 Evaluate the Application

The Evaluation page allows you to rank each grant application according to the criteria set forth by your foundation. You are able to document comments and access details of the grant application while performing your evaluation.

1. Rank each evaluation question using the scale provided

2. Enter any comments applicable to this application evaluation

3. Access all forms submitted by the applicant as well as internally generated documents that have been attached by the administrator by clicking links at the top of the evaluation form.

4. After you have completed the ranking questions and enter comments, click on the “Save Evaluation” button.

(See Diagram On Next Page)
### Staff Evaluator Workflow

#### Evaluation 1
**Current Process: Process 02**

* Required Field

**Evaluation Packet**

**Print Question Legend**

**Organization:** Organization 01 (11111111)

**Project Name:** Evaluation Example project

**Contact Information**

App 01 01 Last Name
01 Address 1
01 Address 2
01 City 01 State/Province Postal Code 01 Country
01 Phone Number
01 Email 01 Text

<table>
<thead>
<tr>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>No documents have been added.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Forms</th>
<th>LOI Application</th>
</tr>
</thead>
</table>

**Project Name**

Enter Project Name
Evaluation Example project

**Amount Requested**

Amount Requested

$ 1000

**Site Visit**

Was there a site visit?

- [ ] Yes
- [ ] No

**Date of site visit:**

**Comments**

[10000 characters left of 10000]

**Rating**

Rate this program:

- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4
- [ ] 5

**Amount recommended**

What amount of funding do you recommend for this project?

$ 1000

**Overall Comments**

[10000 characters left of 10000]

---

Supporting documents provided by the administrator will display here.

Click here to view the application. It will open in a separate window or tab.

Project Name and additional application information is provided in the grey areas.

Answer the evaluation questions. Required questions are marked with an asterisk.

Save will save all of your answers.

You can resize text areas by dragging the corner.
STEP 4 Confirmation Page

Once you have completed the grant application evaluation, you will be taken to a Confirmation Page. Clicking Continue, returns you to the Evaluation Workload Page where you can select any remaining grant applications that have been assigned to you.

After saving each evaluation, click Continue to return to the Evaluation Workload page.

STEP 5 Review Scoring

1. Your score will appear for each evaluation containing scoring questions that you have completed.
2. A green check mark will appear for each evaluation that you have answered all of the required questions.
3. Continue until all assigned applications have been evaluated. You can edit saved evaluations by simply clicking the Review link and resaving the evaluation form.
Shared Documents

In the Shared Documents area you can view files uploaded by the administrator. Click on Shared Documents under tools to access the files.

Logging Off

Click on your name to edit your information.
Click the Log Off button in the top right to end your session.