



Online Grants System – New Applicant Training Materials

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.

- If you've been provided an access code, you may enter it in the upper right hand corner to reveal the opportunity you have been invited to apply to.
- 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 or submit. Depending on the Foundation the form will likely be a LOI or Application. In this example, you are taken directly into the application.

A screenshot of the 'Apply' page in the grants system. At the top left is a document icon and the word 'Apply'. To the right is a text input field labeled 'Enter Access Code' with a 'Enter Code' button. Below this is a blue-bordered information box with an 'i' icon and the text: 'If you have been provided with an Access Code, you may enter it in the box at the top of the page.' Underneath is a search bar with a magnifying glass icon, the text 'Quick Search', and a close 'x' button. The main content area shows a card for 'Base Camp Example Process' with the text 'Accepting Submissions from 01/01/2018 to 12/31/2018' and a blue 'Apply' button. Below the card is a placeholder text: 'This is where the process description would appear.' At the bottom of the card are three buttons: 'Preview' (with an eye icon), 'Send to GrantHub' (with a checkmark icon), and an information 'i' icon. Two orange arrows point to the 'Preview' and 'Apply' buttons.

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

- You may also update your contact information, and view your email history.
 - If the Foundation allows applicants to update organization information you will see the edit icon next to the Organization Information.
 - If not, you must contact the Foundation directly to change organization information.
- 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.
- Please note that if the form has a specific deadline it will be listed at the top of the form.
 - Depending on the Foundation you may or may not be able to submit after the deadline has passed.
 - 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.
 - If you are not allowed to submit, you will receive a message should you attempt to submit.

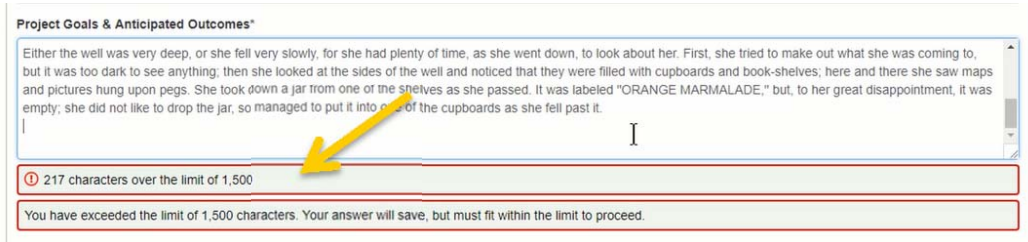
The screenshot shows the 'Application' page for 'Foundant Base Camp' with the user 'Molly Applicant'. The page includes a navigation bar with 'Apply' and 'Fax to File' buttons. The main content area is titled 'Application' and shows the process 'Base Camp 2018 Fall Application'. There are two tabs: 'Contact Info' (selected) and 'Request'. The 'Contact Info' tab displays applicant and organization details. A 'Request' button is visible. A message box states: 'If your organization information does not appear correct, please click the edit (pencil) icon.' Below this, there are buttons for 'Contact Email History' and 'Question List'. A 'Public Profile' button is also present. Yellow arrows point to the edit icon, the 'Contact Email History' button, the message box, and the 'Question List' button. A red arrow points to the 'Request' button. A blue arrow points to the 'Application' tab. A green arrow points to the 'Due on 10/31/2018 12:00 AM MDT.' message.

Work your way through the form responding to the fields.

- Note that 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 that group, as an indicator to yourself that you've completed that section and reduce scrolling.
- Some fields have character limits.

The screenshot shows a text input field with a character limit indicator. The text inside the field is: 'Project Goals & Anticipated Outcomes*'. Below the text, there is a green bar with a white arrow pointing to the right and the text '642 characters left of 1,500'. A yellow arrow points to the green bar.

- 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.
 - If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
- Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.
- Even though the system is auto-saving there is still a **“Save”** button at the bottom of the form.
 - When you click save you are taken to a confirmation page so you know the save was successful.



- If you click **“Continue”** you will be taken back into the form so you can continue working.
- If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
 - Pick back up where you left off by clicking **“Edit”** link to the right of the request.

The screenshot shows the Applicant Dashboard for 'Foundant Base Camp'. At the top, there are navigation links for 'Apply' and 'Fax to File'. The main section is titled 'Applicant Dashboard' and includes a 'Public Profile' button. Below this, there are two columns of information: 'Applicant' (Mr. Molly Applicant, MollyApplicant@invalid.email.com, 555-555-5555, 398 60th Street, Bozeman, MT 59718) and 'Organization' (Thrive, 36-3501185, 555-525-5556, 398 60th Street, Bozeman, MO 59718). A blue box with an information icon contains the text: 'If your organization information does not appear correct, please click the edit (pencil) icon.' Below this, there are tabs for 'Active Requests' (4) and 'Historical Requests' (6). The 'New Playground' section shows a table with the following data:

Process: Base Camp 2018 Fall Application				
Application	Draft	06/08/2018	Due on 10/31/2018 12:00 AM MDT	Edit Application
Decision	Undecided			

When all of the fields are complete, submit the application.

- If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
 - An error message appears listing the fields that need to be completed or edited.
 - These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
 - When you click **“Continue”** you are taken to your dashboard where you can VIEW your submitted request.
 - Note, that once an application has been submitted you can no longer edit it.

Applicant Dashboard

This screenshot shows the Applicant Dashboard after a successful submission. The 'New Playground' section now shows the application status as 'Submitted' on 06/08/2018. The 'View Application' link is highlighted with a yellow arrow, indicating that the application can now be viewed but not edited.

Process: Base Camp 2018 Fall Application				
Application	Submitted	06/08/2018		View Application
Decision	Undecided			