



Foundant Grants Life Management (GLM) Applicant Tutorial

Welcome to the Northwest CT Community Foundation online grants portal. Referred to by Foundation staff as **GLM**, this system allows you to apply for grants online, with no need to print out and mail any documents to the Foundation offices. In addition, applicants will also use this system to review, sign and submit follow-up paperwork such as grant agreements, payment requests and post grant reports, entirely online.

To begin using our system, you will need to set up an account for your organization as well as your individual role within your organization. You will need to know your organization's **Employer Identification Number (EIN)/Tax ID** when creating the organization profile, as this how the GLM will determine if your organization already exists in our system.

IMPORTANT NOTE: When you begin creating your account, you may receive this message:

Duplicate Tax ID

Attention Applicant! The Tax ID number you have entered is already registered in the system. Please do not create a duplicate account. Please contact the Foundation to receive your log-on credentials.

This means your organization already exists in the system. Please email Christina Tranquillo at ctranquillo@northwestcf.org to get your log-on credentials. In the email, please indicate the name of your organization, your job title and the preferred email you would like to use to log in.

Please follow this link to begin the set up process:

www.northwestcf.org/grants

Creating a New Account

- Creating a new account is a multi-step process:
 - The first section collects **Organization Information**
 - The second section collects **User Information**
 - And sections three and four collect **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 address, 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: Should you need to navigate to a 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 their browser’s “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.
- Once the password is created, click the **“Create Account”** button.

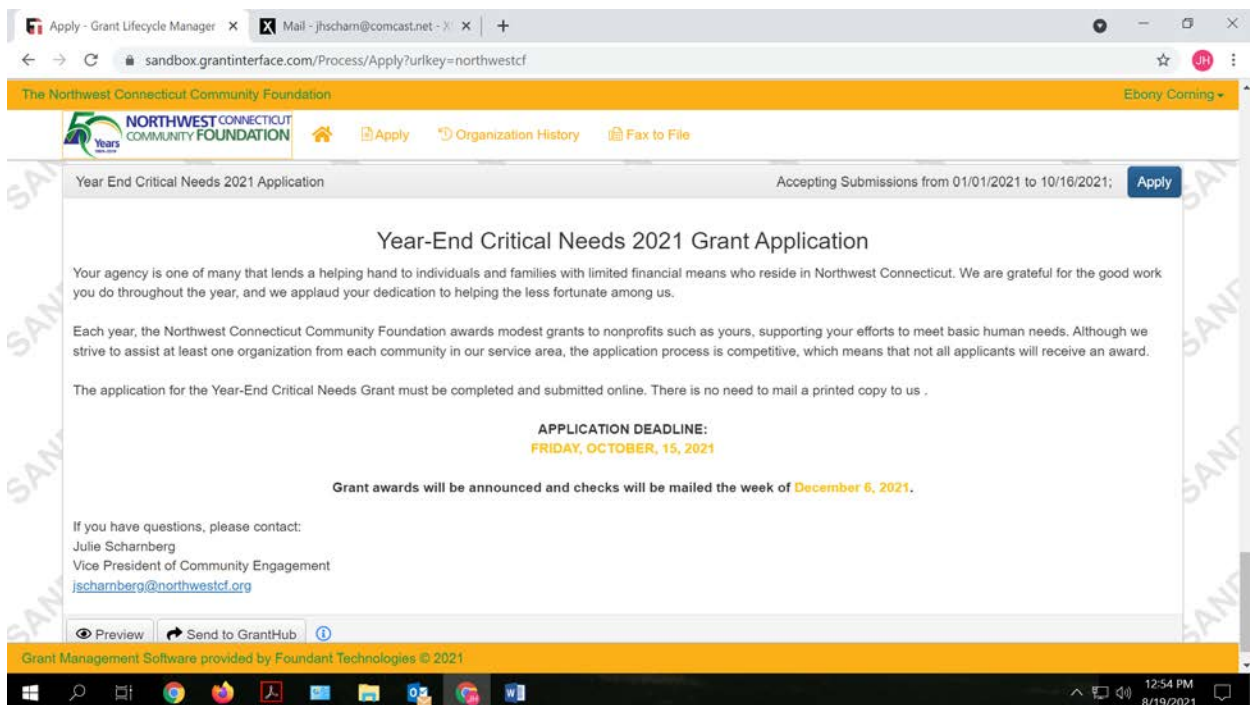
After clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system.

Follow the onscreen instructions and click the **“Continue”** button to finish the registration process. Now you have an account in the system 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 open grant opportunities, including application deadlines and other applicable information.



The screenshot shows a web browser window displaying the Northwest Connecticut Community Foundation's grant application page. The page title is "Year-End Critical Needs 2021 Application" and it indicates that submissions are accepted from 01/01/2021 to 10/16/2021. The main heading is "Year-End Critical Needs 2021 Grant Application". The text on the page reads: "Your agency is one of many that lends a helping hand to individuals and families with limited financial means who reside in Northwest Connecticut. We are grateful for the good work you do throughout the year, and we applaud your dedication to helping the less fortunate among us. Each year, the Northwest Connecticut Community Foundation awards modest grants to nonprofits such as yours, supporting your efforts to meet basic human needs. Although we strive to assist at least one organization from each community in our service area, the application process is competitive, which means that not all applicants will receive an award. The application for the Year-End Critical Needs Grant must be completed and submitted online. There is no need to mail a printed copy to us." The application deadline is highlighted as "APPLICATION DEADLINE: FRIDAY, OCTOBER, 15, 2021". It also states that "Grant awards will be announced and checks will be mailed the week of December 6, 2021." Contact information for Julie Scharberg, Vice President of Community Engagement, is provided with the email address jscharberg@northwestcf.org. At the bottom of the page, there are buttons for "Preview" and "Send to GrantHub". The footer of the page mentions "Grant Management Software provided by Foundant Technologies © 2021".

- 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.

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.
 - If you need to update the organization information, contact the Foundation directly to make changes.
- If you’d like a PDF copy of the application to review the questions, 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 each field.

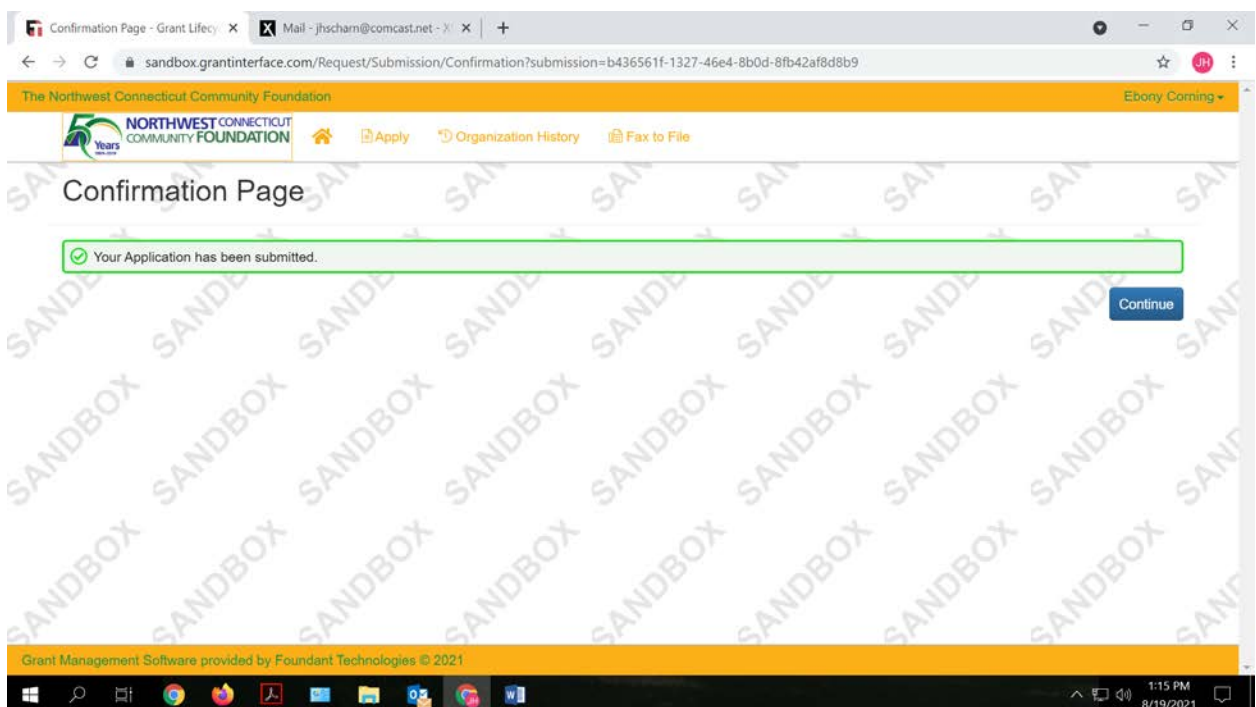
- Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.

- You may collapse question groups as you go once you've finished all of the questions in that group. This may be a reminder to yourself that you've completed that section and to 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 to match 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 you 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 an unaccepted file type you will receive a warning that the file type is not acceptable and you will not be able to upload that 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 access the **draft of the form** from your **Dashboard** the next time you log in.
 - Pick back up where you left off by clicking the **"Edit"** link to the right of the request.
- If you need to, you may abandon the request before it is submitted.

- Or, once the form has been submitted if you want to abandon the request, you must contact the Foundation to withdraw the request from consideration.
- After selecting **Abandon Requests**, you must type in Abandon Request and select OK.
- The request will be visible in the Historical Requests tab just as it would if Foundation staff had abandoned the request per your instructions.

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 you scroll through the form.
- When an application is successfully submitted, you will be taken to a confirmation page.



- When the 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.

Your Applicant Dashboard

The screenshot displays the Northwest Connecticut Community Foundation Applicant Dashboard. At the top, there is a navigation bar with the foundation's logo and name, and a user profile dropdown for 'Ebony Coming'. Below this, the main heading is 'Applicant Dashboard'. A 'Public Profile' button is visible. The dashboard is divided into two columns: 'Applicant' and 'Organization'. The Applicant information includes: Ms. Ebony Strand Corning, jhscham@comcast.net, 860-626-1245, 888 Dark Web Alley, Norfolk, CT 06058 USA. The Organization information includes: NinjaFiberInstall, 12-3334445, 860-626-1245, 888 Dark Web Alley, Norfolk, CT 06058 USA. A 'Contact Email History' link is provided. A message box states: 'If your organization information does not appear correct, please contact the funder. Thank you.' Below this, there are tabs for 'Active Requests' (3) and 'Historical Requests' (1). The 'Active Requests' tab is selected, showing a request for 'Fiber for the holidays'. The process is 'Year End Critical Needs 2021 Application'. A table shows the application was submitted on 08/19/2021 and the decision is 'Undecided'. A 'View Application' link is present. The footer indicates 'Grant Management Software provided by Foundant Technologies © 2021'.

Your dashboard houses current and historical requests.

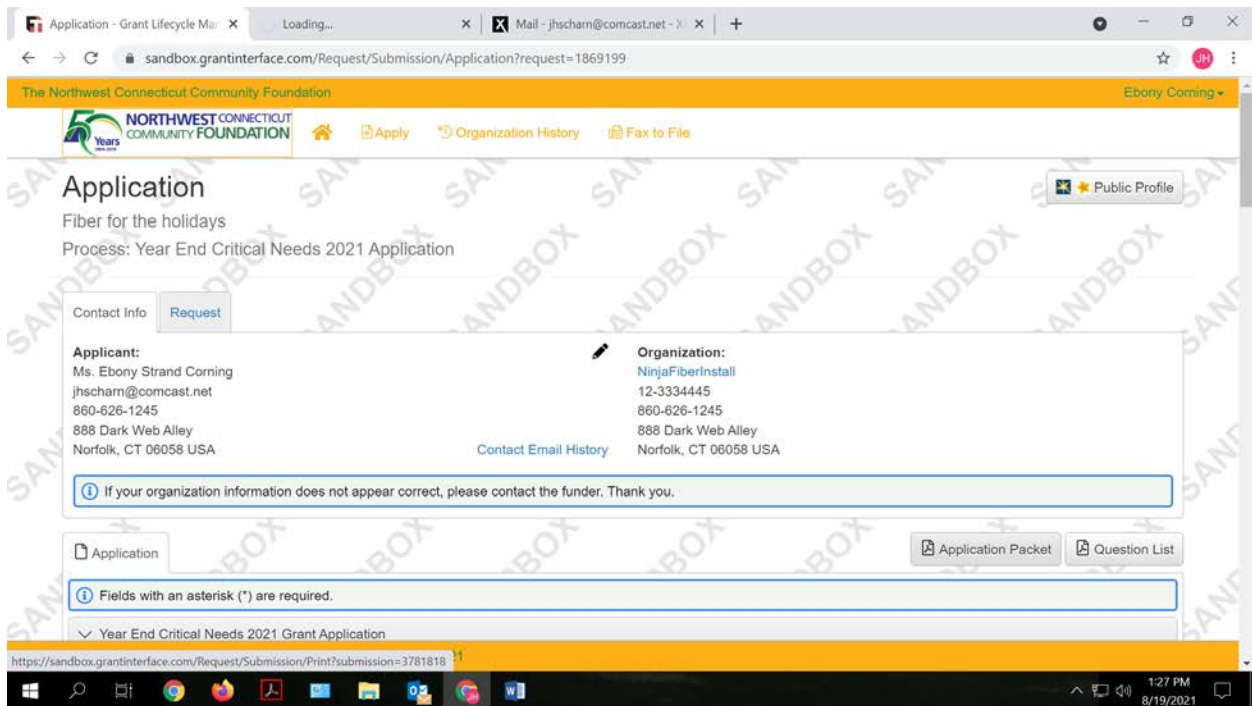
The Active Requests tab houses all current requests. These are the requests still requiring action, awaiting a decision and/or requests that have not yet been marked closed by the Foundation. Within each request you can see forms, form status and submission dates and, if applicable, form deadlines.

- You may continue working on saved applications prior to the stated deadline for your selected grant round by clicking the edit option next to the form.
- You may view forms that have been submitted, however once submitted you cannot edit them.
- You can also see each request’s decision status.

- The status will be “Undecided” until the Foundation posts a decision.

To get a copy of your application to save on your own system, you can click blue link to the right to “View Application”

Clicking on “Application Packet” – the grey button to the right will generate a PDF that you can save on your own system.



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

- Follow ups are completed and submitted just like any other form.
- Follow ups that are past due will be marked as such.

Denied requests and requests marked closed by the Foundation are housed in the Historical Requests 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.

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

We hope you find this tutorial helpful, and if you still have any questions or issues with the application process, please contact the Foundation.