

## Overview

This document is designed to provide grant applicants with instructions for use of the Foundant Grant Lifecycle Manager application. Remember while this document attempts to provide step-by-step instructions, we realize that not all user scenarios may be adequately covered. If you remain on a page with inactivity for longer than 90 minutes, you will be logged off for security reasons. The system will auto save as you move from question to the next, and will save every 100 characters in longer text responses. Auto save is noted by the border of the question highlighting in green

## Registration Page

**If you already have an account** with this Foundant Grant Lifecycle Manager;

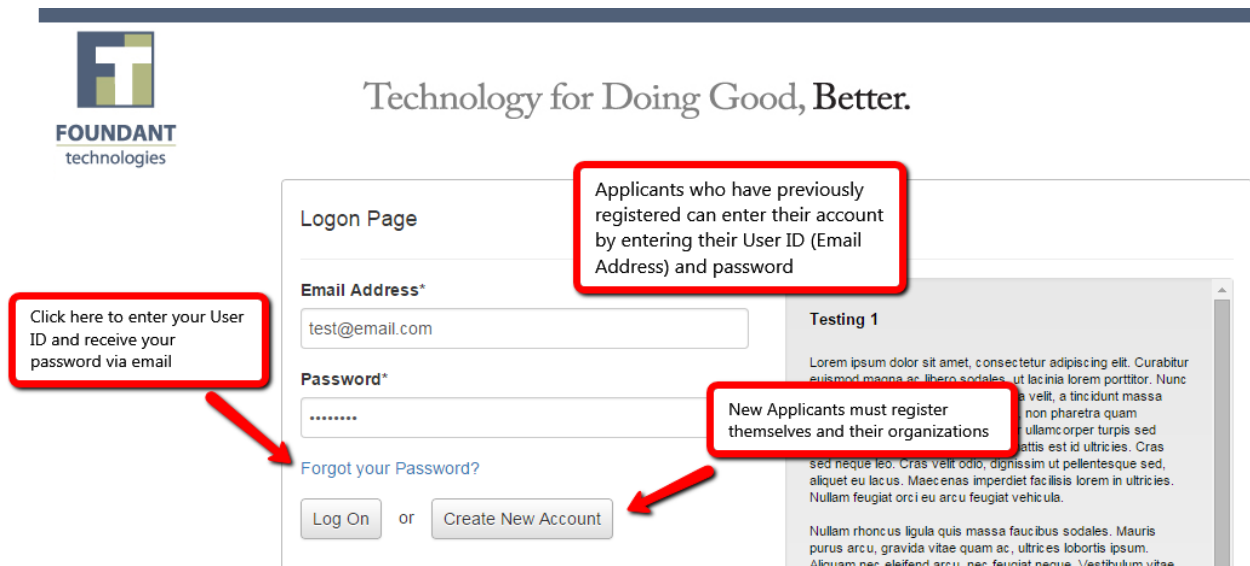
1. Enter your **Login**, which is your e-mail address, in the **Email Address** field.
2. Enter the **Password** that you chose when you set up your account.
3. Press the “**Log On**” button to enter the Grant Lifecycle Manager.

**If you have forgotten your password;**

- 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;**

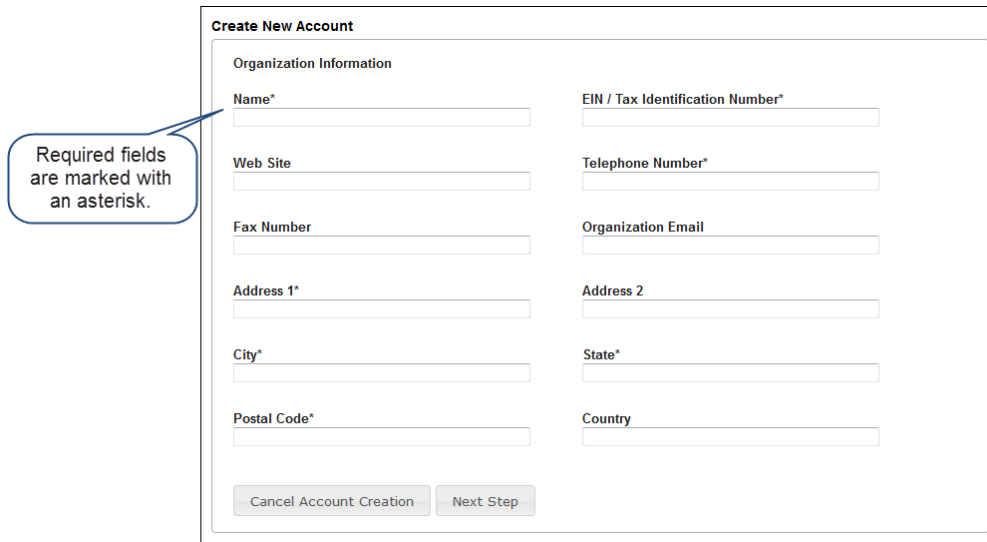
- Click on **Create New Account** to register.



## Creating 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

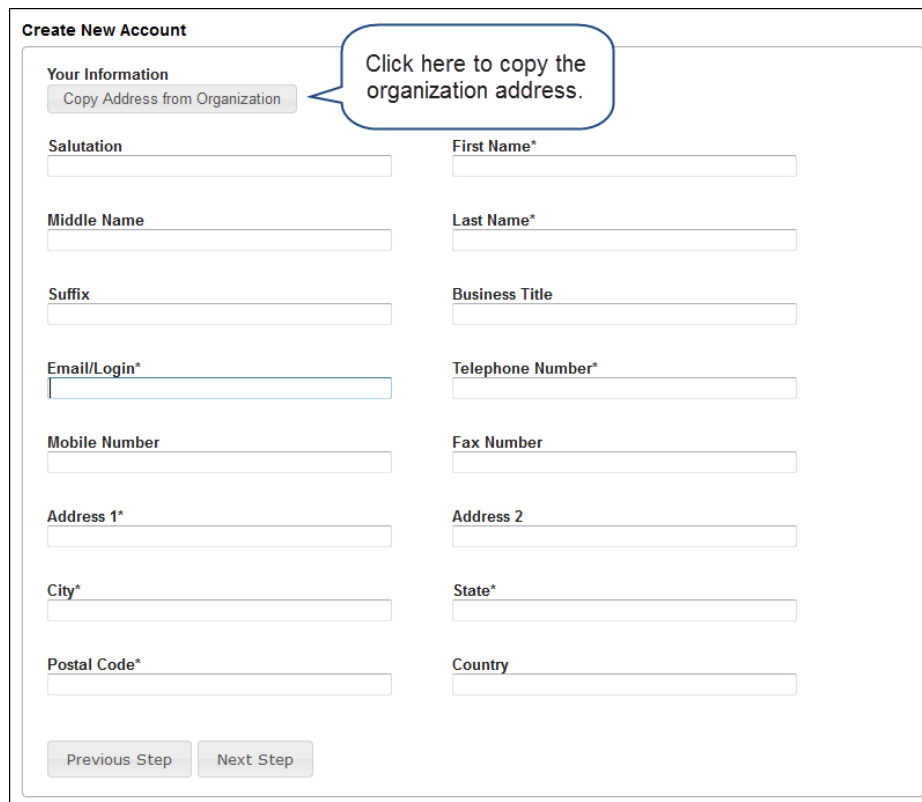
City\*  State\*

Postal Code\*  Country

Required fields are marked with an asterisk.

## 3. Click on the **Next Step** button

## 4. Enter **Your (Applicant) 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 Officer**

**Create New Account**

Executive Officer

Are you the Organization's Executive Officer?\*

Yes

No

[Previous Step](#) [Next Step](#)

7. Click on the **Next Step** button
8. Enter the **Organization Executive Officer Information**

**Create New Account**

Additional Executive Officer Information

[Copy Address from Organization](#)

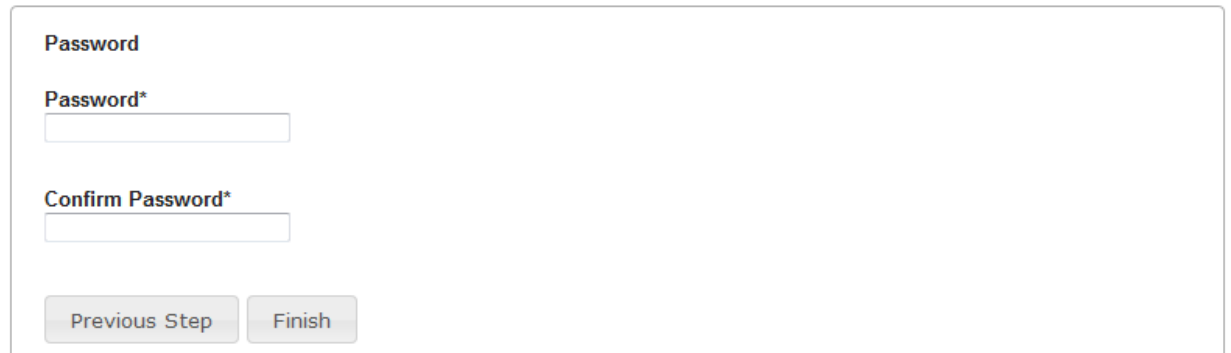
Click here to copy the organization address.

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"/>

[Previous Step](#) [Next Step](#)

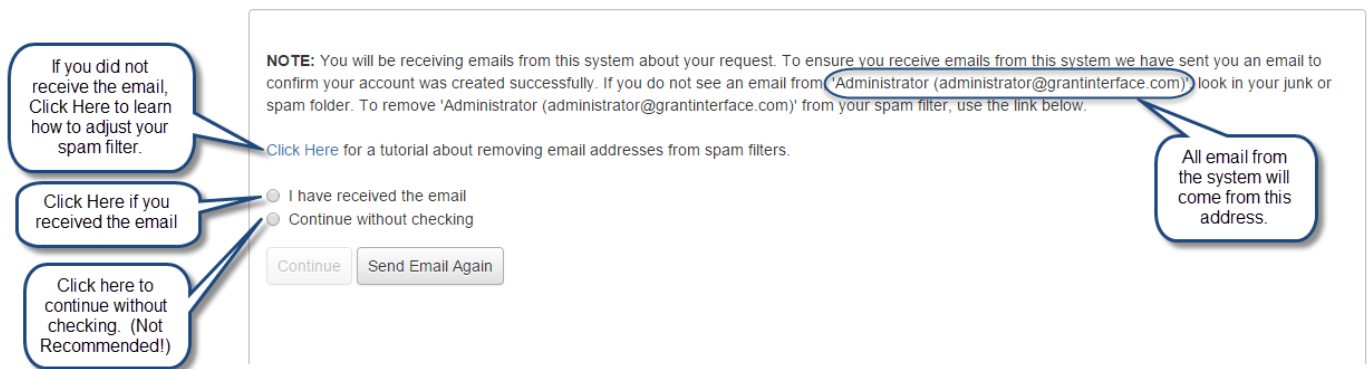
9. Click on the **Next Step** button
10. Set your password

## Create New Account



11. Click on the **Finish** button

12. Confirm that you received your registration email from the system. It is important to make sure you can receive emails, as this will be a method of communication from the organization.



**NOTE:** You will be receiving emails from this system about your request. To ensure you receive emails from this system we have sent you an email to confirm your account was created successfully. If you do not see an email from "Administrator (administrator@grantinterface.com)" look in your junk or spam folder. To remove "Administrator (administrator@grantinterface.com)" from your spam filter, use the link below.

[Click Here](#) for a tutorial about removing email addresses from spam filters.

I have received the email  
 Continue without checking

If you did not receive the email, Click Here to learn how to adjust your spam filter.

Click Here if you received the email

Click here to continue without checking. (Not Recommended!)

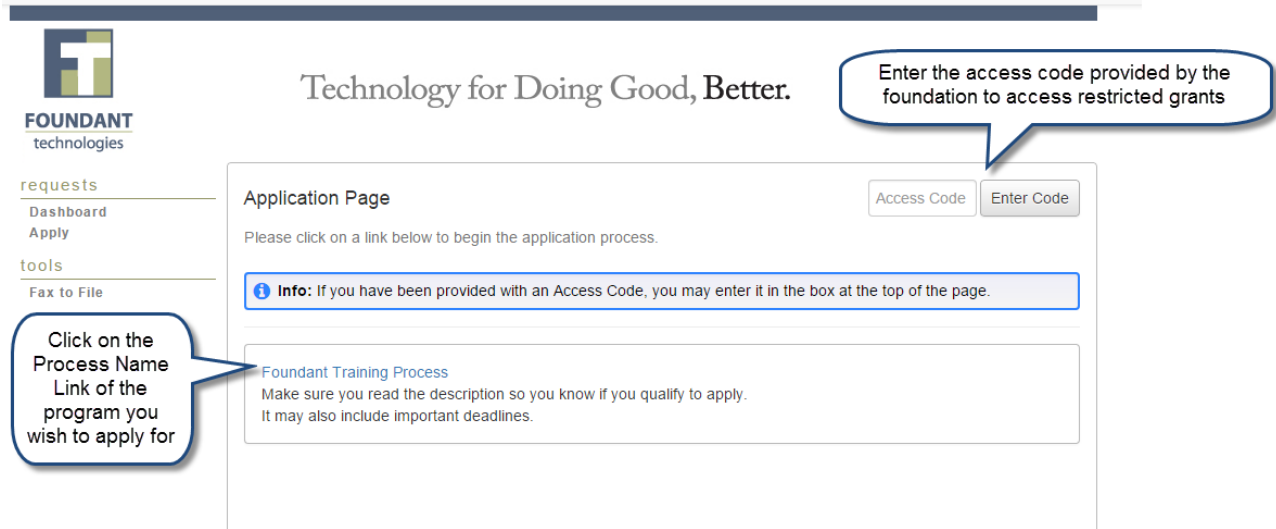
All email from the system will come from this address.

## 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 in the upper right corner and click "Enter Code." This will allow only the private grant program to appear.
- 2) After the grant program appears, click it to start filling out the first form.

- a. Grant Programs have the ability for multiple forms. Some grant programs can have the applicant submit 3 forms to the foundation before a decision is made. Each form will be filled out and submitted to the foundation. After it is deemed complete, the foundation will approve you to move on to the next form.



The screenshot shows the 'Application Page' interface. On the left is a navigation menu with 'requests' (Dashboard, Apply) and 'tools' (Fax to File). The main content area is titled 'Application Page' and includes an 'Info' box with instructions on using an Access Code. A callout bubble points to the 'Foundant Training Process' link, and another callout bubble points to the 'Access Code' and 'Enter Code' buttons.

FOUNDANT technologies

Technology for Doing Good, Better.

requests  
Dashboard  
Apply

tools  
Fax to File

Application Page

Access Code Enter Code

Please click on a link below to begin the application process.

**Info:** If you have been provided with an Access Code, you may enter it in the box at the top of the page.

[Foundant Training Process](#)  
Make sure you read the description so you know if you qualify to apply. It may also include important deadlines.

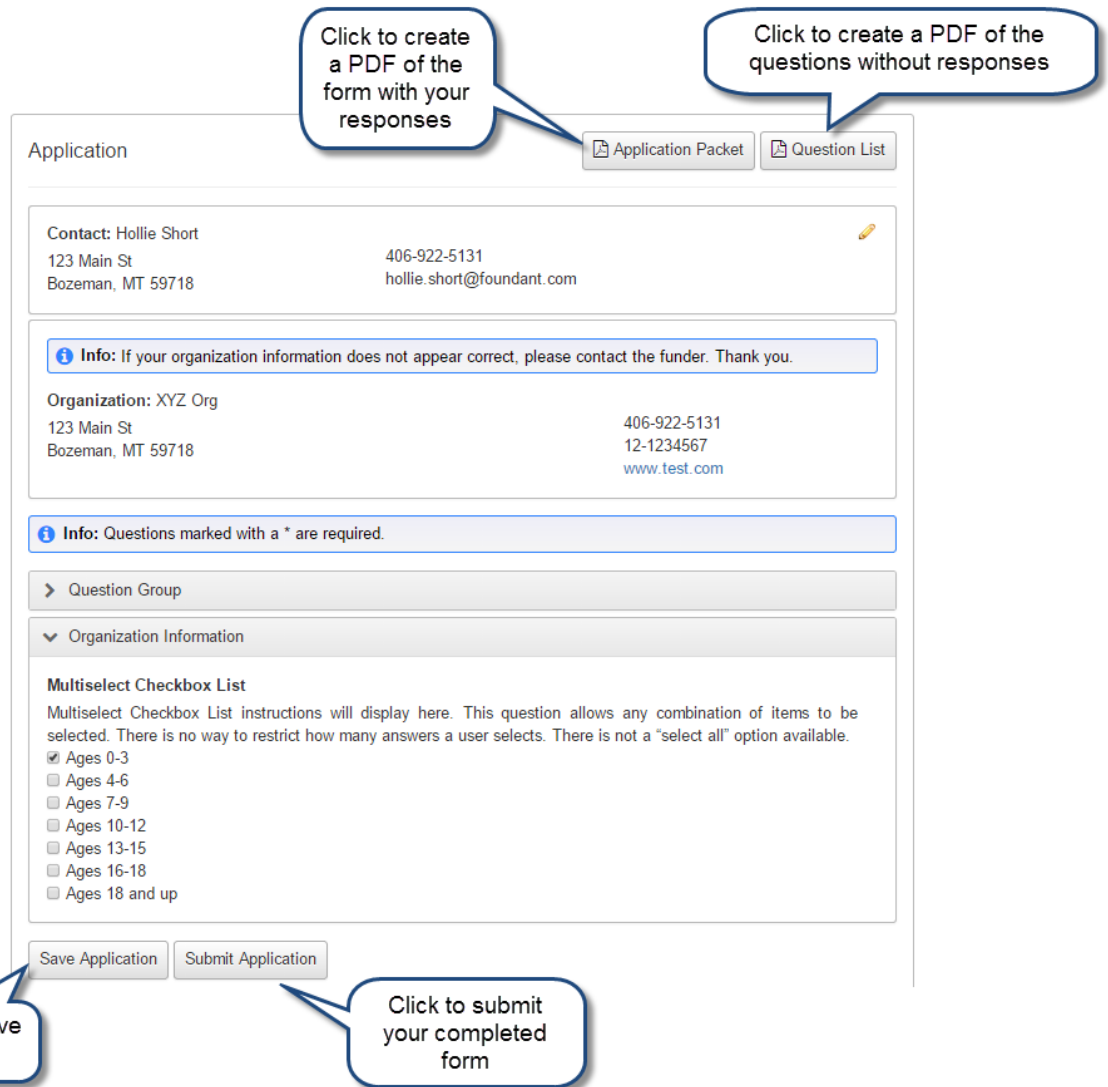
Click on the Process Name Link of the program you wish to apply for

Enter the access code provided by the foundation to access restricted grants

## 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.



The screenshot shows an application form interface. At the top right, there are two buttons: "Application Packet" and "Question List". Callout boxes point to these buttons with the text: "Click to create a PDF of the form with your responses" and "Click to create a PDF of the questions without responses".

The form content includes:

- Contact:** Hollie Short, 123 Main St, Bozeman, MT 59718, 406-922-5131, hollie.short@foundant.com
- Info:** If your organization information does not appear correct, please contact the funder. Thank you.
- Organization:** XYZ Org, 123 Main St, Bozeman, MT 59718, 406-922-5131, 12-1234567, www.test.com
- Info:** Questions marked with a \* are required.
- Question Group**
- Organization Information**
- Multiselect Checkbox List**  
Multiselect Checkbox List instructions will display here. This question allows any combination of items to be selected. There is no way to restrict how many answers a user selects. There is not a "select all" option available.
  - Ages 0-3
  - Ages 4-6
  - Ages 7-9
  - Ages 10-12
  - Ages 13-15
  - Ages 16-18
  - Ages 18 and up

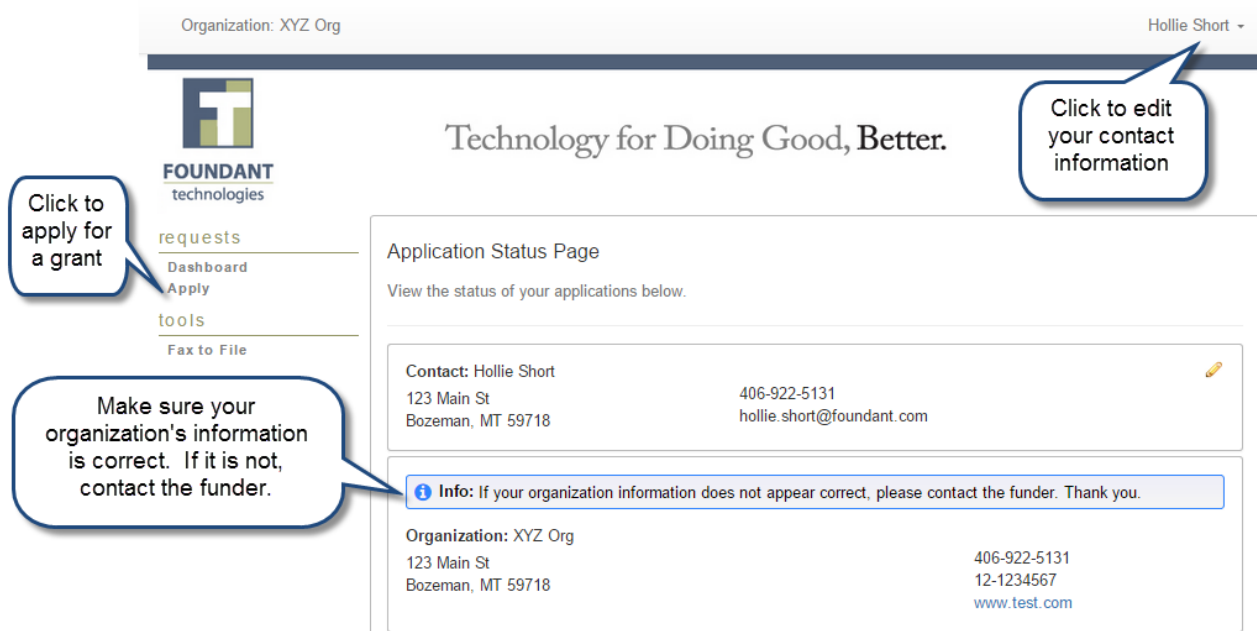
At the bottom, there are two buttons: "Save Application" and "Submit Application". Callout boxes point to these buttons with the text: "Click to save the form" and "Click to submit your completed form".

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.

## 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.
3. Fax to File – Instead of scanning a document you can fax it to your computer. Using Fax to File helps shrink documents to a smaller file size.



The screenshot shows the 'Application Status Page' for 'Organization: XYZ Org' with user 'Hollie Short'. The page title is 'Technology for Doing Good, Better.' The main content area is titled 'Application Status Page' and says 'View the status of your applications below.' There are two contact information sections. The first section shows 'Contact: Hollie Short' with address '123 Main St, Bozeman, MT 59718' and phone '406-922-5131', email 'hollie.short@foundant.com'. Below this is an info box: 'Info: If your organization information does not appear correct, please contact the funder. Thank you.' The second section shows 'Organization: XYZ Org' with address '123 Main St, Bozeman, MT 59718' and phone '406-922-5131', '12-1234567', and website 'www.test.com'. A sidebar on the left has 'requests' (Dashboard, Apply), 'tools' (Fax to File), and 'FOUNDANT technologies' logo. Callouts include: 'Click to apply for a grant' pointing to 'Apply', 'Make sure your organization's information is correct. If it is not, contact the funder.' pointing to the info box, and 'Click to edit your contact information' pointing to an edit icon.

## 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 form 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.

Application Status Page  
View the status of your applications below.

Contact: Daren Nordhagen  
4928 Bogart Bozeman, MT 59715      345-652-4785      darenordhagen@foundant.com

**Info:** If your organization information does not appear correct, please contact the funder. Thank you.

Organization: ABC Organization  
234 Ice Center Lane Bozeman, MT 59718      555-426-8856      53-0196605      www.granthub.com

Special request grant

Process: Foundant Training Process

Application	Draft	03/05/2015	<a href="#">Edit Application</a>
Decision	Undecided		<a href="#">View Details</a>

Operating Support 2015

Process: Foundant Training Process

Application	Submitted	02/22/2015	<a href="#">View Application</a>
Decision	Approved	2/23/2015	<a href="#">View Details</a>

Follow-Up Forms

FORM NAME	ASSIGNED TO	GRANT / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Grant Agreement	Daren Nordhagen	Overall Grant	04/01/2015	Assigned	<a href="#">Edit</a>
Final Grant Report	Daren Nordhagen	Overall Grant	05/01/2016	Assigned	

Annotations:

- Click to collapse the details of this request
- Click to edit the form
- Click to view the form
- Names of follow up forms assigned
- Click to view the details of the decision

## Viewing Decision Details

The Decision Details Page is where you can view the details of your grant and scheduled payments.

**All organization may not have this viewable to applicants**

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.
3. If the Grant was approved you can click View Details to see Grant Amount, Grant Type (One Time, Installment or Matching) & Payment Schedule.



Application Process Status - Follow Up Draft

STAGE	STATUS	INITIAL SUBMISSION	
Application	Complete	02/22/2015	<a href="#">View</a>

STAGE	DECISION TYPE	DECISION DATE
Decision	One Time	02/23/2015

Payment Summary

**Grant Amount:** \$2,500.00  
**Grant Type:** One Time  
**Due:** 02/28/2015

PAYMENT DATE	PAYMENT AMOUNT
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Callouts: Grant Amount, Date of Grant, Type of Grant, Payment Details (if a payment has been made)