

## Online Application Help

(Note that if you hold the Control button and click the underlined headers on the first page, the links will take you to the header-specific sections of the document. At the end of each section is 'Back to Top' link that will take you to the top of the first page.)

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## General

### When do you accept online proposals?

Online grant requests will be accepted 24-hours a day, 7 days a week. Email inquiries will only be answered during normal business hours, Monday through Friday, 9:00 a.m. – 5:00 p.m.

### What is a Supporting Organization, 509(a)(3)?

View the IRS website to learn more: [http://apps.irs.gov/irm/part7/irm\\_07-020-007.html](http://apps.irs.gov/irm/part7/irm_07-020-007.html)

### I do not know my organization's Federal Tax ID. How can I find it?

Your Federal Tax ID is a 9-digit number that contains only numbers, and acceptable formats for this number are 123456789 and 12-3456789. For questions concerning your organization's Tax ID status or the specific 501(c)(3) subsection under which your organization is classified, contact the Internal Revenue Service Call Center at 877.829.5500. Make sure to confirm your organization's tax exempt status and that your organization's ID number will be listed on the next electronic release of the IRS Business Master File. If your organization is a religious organization, municipality, subdivision of state, or a school, your organization may not be required to have a Federal Tax ID. If this is the case, leave the Tax ID field blank in the application.

### How can I find my organization's NTEE code as designated by the IRS?

The National Taxonomy of Exempt Entities (NTEE) system is used by the IRS to classify nonprofit organizations. You can search for your organization's NTEE description at [www.guidestar.org](http://www.guidestar.org). If your organization is a church, municipality, subdivision of state, or a school, your organization may not be listed on Guidestar. If so, choose the closest NTEE description from the dropdown list in the application form to match your organization type.

If you find your NTEE code and description on Guidestar, locate that same description on the online application. To do this, click on the down arrow in the search box to view the entire list. To narrow your choices, enter your organization's NTEE description in the box and select Search. Finally, click the down arrow to choose one description from the filtered drop down list. To clear your selection, use Reset.

## Navigation

### How do I create an online account?

To create your user account prior to starting an application, click 'Apply Now' from the Application Procedures page of the Foundation's website.

Create your online account using your email address and a unique password. You will then be presented with the foundation's eligibility quiz. Once you pass the eligibility quiz, you will be granted access to the online application. You will also receive an account set-up confirmation via email that will include the URL for the "My Account" login page. This URL enables you to return to the 'My Account' page and access your 'Open' applications, or any of your previously 'Submitted' applications at any time. Open and submitted applications are retained on the site for 120 days.

### How can I see the application before I get started?

After creating an online account, passing the eligibility quiz, and gaining access to the application, you will be able to review the foundation's online application questions in advance by clicking on the 'Printer Friendly Version' at the top of the application page. A read-only version of the application will open. Click 'File' then 'Print' on your browser's toolbar. Answers can be prepared offline and then pasted into the online application later. If you have already begun your application and long text answers have already been entered, please see FAQ below 'How can I print my completed application before I submit it?' for more information.

Note that there are also required attachments for the application not specified on the 'Printer Friendly Version' (see section below titled 'Attachments'). Once you begin an online application, you must submit your application online. Do not mail the 'Printer Friendly Version.'

**Once I begin the online application, can I save and finish it later?**

Yes. After creating an online account, you will receive a welcome email with a unique URL to access the 'My Account' page. Save this URL in your favorites. When working on an application, you may click 'Save & Finish Later' located at the bottom of every page of the application. You can then return to the URL link in your favorites when you are ready to complete your application.

**What do I do if the online application is not saving my answers and does not seem to be functioning?**

Check to see if you have a compatible browser installed on your computer. The online application is compatible with the following browsers: Internet Explorer® 8, Internet Explorer® 7, Mozilla® Firefox® 3.6, Mozilla® Firefox® 3.5, Mozilla® Firefox® 3.0, Safari® 4 (for Mac), Safari® 3.2 (for Mac), and Google Chrome™. Note that the online application is not certified with Vista at this time.

**How do I access my user account if I cannot locate my welcome email containing the URL to return to the 'My Account' page and my online application?**

You can access your 'My Account' page by pasting the following into your browser: [https://www.GrantRequest.com/SID\\_1116?SA=AM](https://www.GrantRequest.com/SID_1116?SA=AM). If you receive an error message, it is likely that your computer does not support cookies. Delete the cookie 'CT=CT&' from the browser address and press enter.

**I saved the application in My Favorites. However when I click on it, I am receiving an error.**

If you save the application URL as a favorite in your browser, note that you should first delete the cookie 'CT=CT&' from the browser address and then save again in order to access the site successfully.

**How do I access help if the application I am working on freezes or encounters a technical error?**

First, make sure that your connection to the Internet is valid. A good way to do this is to open a browser and access a particular page on the Internet other than the application form or online requirement. Next, check to see if you have a compatible browser installed on your computer. The online application is compatible with the following browsers: Internet Explorer, Mozilla Firefox, and Safari (for Mac), Internet Explorer® 8, Internet Explorer® 7, Mozilla® Firefox® 3.6, Mozilla® Firefox® 3.5, Mozilla® Firefox® 3.0, Safari® 4 (for Mac), Safari® 3.2 (for Mac), and Google Chrome™. Note that the online application is not certified with Vista at this time.

If you are still experiencing a problem, here are some tips to help us to trouble shoot your issue:

- Provide specific information about the browser type and version you are using.
- Note what steps you had taken when you encountered the problem.
- Keep record of the exact text of any error messages that you encountered.
- Send this information to the email address of the contact listed in the application..

**What do I do if there was a previous staff person working on the application who has since left our organization?**

If you do not have the prior staff person's email-address and password, call 866.778.6859, Monday through Friday, 9 a.m. to 5 p.m. Eastern Time. If we have a recent online application submission on file, we may be able to transfer your organization's account to your email address. If this is not possible, you will have to create a new account and may not be able to access the historical records online.

## Process

### What are the recommended process steps for the online application?

- Thoroughly review the Foundation's website to ensure your grant request is appropriate and in alignment with the foundation's mission, guidelines, and restrictions prescribed by the donor and/or trustee.
- Review the foundation's online application questions in advance. To do this click on 'Printer Friendly Version' at the top right corner of the application page. Answers can then be prepared offline and pasted into the online application later.
- Review the list of required attachments. Prior to beginning the application, prepare the required documents for upload. PDF, Word, or Excel are the preferred electronic formats. Each attachment must not exceed 25 megabytes.
- Do not use all caps in the text of your online application.

### Before I apply online, I would like to receive a copy of the application questions, how can I get a copy?

In order to obtain a printable copy of the application click on 'Apply Now' in the Application Procedures page. Second, sign in to your 'My Account' page, or set up a new online user account to gain access to the online application. Take the eligibility quiz and then click 'Printer Friendly Version' at the top of the application page. Select file and then print from your browser menu.

### What happens if I do not answer a required question marked with the following character \* ?

All required information on the application is indicated with a gray asterisk \*. Note that you will not be able to submit your application until all of the required questions have been completed. When you click 'Review and Submit' at the end of the application, you will be presented with a list of necessary corrections, if applicable.

⚠ This symbol will indicate the required fields that were left empty. Page down and fill in the required fields. Once all required fields are completed, click 'Update' at the end of the application. You will also be required to upload all attachments before submission.

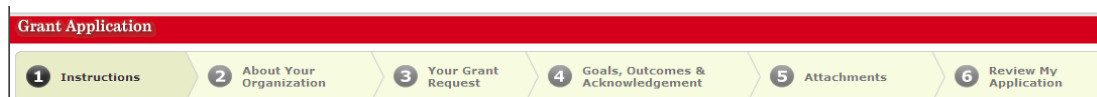
### What are the sections of the online application?

The application is comprised of the following 7 sections:

1. Instructions
2. About Your Organization
3. Your Grant Request
4. Goals & Outcomes
5. Organization Financials & Acknowledgement
6. Attachments
7. Review My Application

### Can I move between sections of the application without completing all required fields first?

There is a progress meter at the top of the application, which allows you to toggle among the pages of the application by clicking on each page title. This will allow you to jump to different sections of the application while saving the data you just entered in the previous section.



The 'Next' button on the bottom left-hand side of the page will allow you to progress directly to the next page.

**Does the character count include extra spaces?**

Blank spaces are counted as characters.

**How do I print a submitted application?**

The 'My Account' page lists both your 'Open' and 'Submitted' grant applications. Click on the submitted application that you would like to print. A printer-friendly version of your application will automatically open in another window as a pop up. Go to File, and then click Print.

## **Attachments**

**What are the required application attachments and where can I find more detail?**

The required attachments are:

1. Board List
2. Organizational Budget
3. Project Budget (required if submitting a project or program request)
4. Financial Statements (audited, reviewed, or compiled by independent auditor)

Depending on the foundation, the following may be required:

1. Organization Summary
2. Other Funding Sources
3. IRS Determination Letter
4. Letter of Support
5. 990 Tax return

More detail regarding the attachments is provided within the attachment section of each unique foundation application. All attachments must include page numbers and the organization's name on each page.

**What file formats will be accepted for attachments?**

PDF, Word, or Excel are preferred electronic formats for attachments. Do not send materials other than what is requested. Note that each attachment must not exceed 25 megabytes. Allow time for each attachment to load completely and appear as a link on the top of the Attachments page before attempting to upload the remaining attachments.

Upload all pages of each required attachment as one document (e.g. If your Board List consists of two pages, upload both pages of the document together as one attachment). Do not upload individual pages of a document as separate uploads. If you are experiencing problems uploading your document, check to make sure that it does not exceed the 25 megabyte maximum and that you are allowing sufficient time for the upload to complete.


**What if I do not have the required attachments in electronic form?**

Attachments may only be submitted electronically. If you do not have the documents electronically, you can scan the information into a PDF file. If you do not have a scanner at your organization, we recommend you use the services of a copy shop or a public library to scan your documents.

If you do not have documentation prepared at this time, click 'Save and Finish Later' to save and exit the application until you are ready. You cannot submit the application and send the attachments later. Applications that do not include the required attachments will not be processed.

## Submission

### How do I submit my application once I am done?

Once all of the fields are complete, you can click the 'Review & Submit' button on the bottom of the 'Attachments' page. Once you have reviewed your application, click the 'Submit' button. If fields are incomplete, you will receive a message  indicating which fields need to be completed. Finish incomplete fields and then click 'submit.' Once your application has been submitted, you can no longer make changes. Your application will be stored for 120 days in the submitted section of your 'My Account' page.

### How can I be sure I am sending everything required for a grant application?

Click 'Review My Application' in the progress meter and it will display information you have provided so far and will highlight missing information, or missing required attachments. It will not allow you to submit your application until the required information is completed and the required attachments have been uploaded.

### How can I print my completed application before I submit it?

There are a few ways to review and/or print your application before submitting. Select 'Printer Friendly Version,' File, and Print. Note that this will print the page exactly as it is seen on the computer screen. If long text answers were cut and pasted from your desktop into the application, the Printer 'Friendly Version' may cut off long text fields in the printout unless a carriage return is not inserted. This will not affect how we will see your answers when we review your application. Once your application is submitted, the answers come into our database with no truncation. Another option is to click Printer Friendly Version, File, Send page by e-mail to your address. Finally, you have the option of saving the html file to your desktop. To do this, select 'Printer Friendly Version', Save As, save as a html file on your desktop. You can also print the application after it has been submitted from the open applications section of the 'My Account' page.

### How will I know if you received my application?

Once you submit your application and it is received, you will be brought to the 'My Account' page which will display the following message: "Thank you! Your application has been submitted." You will see your submitted application listed under 'Submitted Applications' section of the 'My Account' page. You will also receive an email confirming that the application was successfully submitted.

### When will I be contacted about the status of my grant request?

After you complete your online application and select 'Submit' you will receive the submission confirmation on the 'My Account' page. A regional grant manager will then review your application for completeness and provide additional follow-up, as necessary.

### Do grant applications need to be received on or before the due date?

Yes, online applications must be date/time stamped no later than 11:59 p.m. on the due date. We do encourage, however, you submit your online application before the deadline date.