

Grant Application Portal Guide

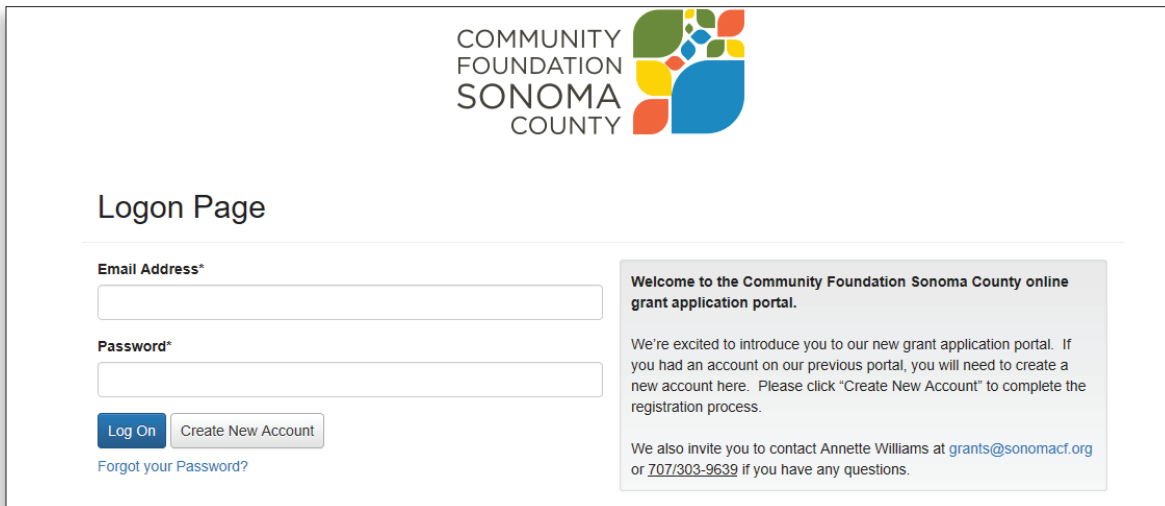
COMMUNITY
FOUNDATION
SONOMA
COUNTY



Accessing the Grant Application Portal

The grant application portal can be accessed by clicking on the [Grantee Login](#) icon in the top right hand corner of the Community Foundation Sonoma County [website](#).

- New users must first register by clicking “Create New Account” on the Logon page.
- Returning users log in to the portal using your e-mail address and the password. If at any time after creating an account, you can’t remember your password, you may click on the [Forgot your Password?](#) link, enter your email address, and you will be sent a link to reset your password.



Registration Process

The registration process has four sections: (1) organization information, (2) your individual user information, (3) Executive Director information, and (4) choosing your individual user password. During the registration process, you cannot save partial information; therefore, you should gather all required information before beginning the registration process.

The registration process is straightforward; however, in some cases, it may be more complex when certain factors apply:

If your organization profile has already been created by a different user:

The first person to register on behalf of an organization will enter the organization’s information, creating the organization profile. It is important to enter this information accurately at registration, because after this point the organization profile can only be edited by Community Foundation staff.

We recommend consolidating all applications into one user account, to easily view your organization’s full history of grants and requests.

If you are unsure whether your organization already has an account or if you need to be added to an existing account, please contact grants@sonomacf.org to discuss your options. (Additional users can be added by Community Foundation staff.)

If your organization has a fiscal sponsor:

If you are applying as a Fiscal Sponsor for another organization, or a Fiscal Sponsor is sponsoring your organization, you will need to enter the information of the Fiscal Sponsor organization in the registration page.

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. *Note: if you attempt to navigate to the previous section using the browser's "back" button, you will lose all registration information entered.*

Your user account ID is your e-mail address. Please remember, this is an account you will use for both present and future applications.

Updating Your Registration Information

To update your user and account information, click on your name at the top right corner of the screen and select "Edit Profile" from the drop-down menu.

To update your organization or Executive Director information after registration, please contact Annette Williams at grants@sonomacf.org.

The Application Page

After completing registration, you will be directed to the Apply page. This page will show our currently open Program grant opportunities, as well as any relevant deadlines.

To start a request, click on the **Apply** button attached to the opportunity you would like to apply to.

The **Home** button at the top left corner of the page will direct you to the Applicant Dashboard. This screen is your homepage where you can check the status of your current and historical requests.

The **Active Requests** tab houses all current requests. These requests still require action, are awaiting a decision, and/or have not yet been marked closed by the site administrator. Within each request, you can see applications, application status, submission dates, and deadlines.

You may continue working in a saved (but not submitted) application by clicking the **Edit Application** button. You may view applications that have been submitted but cannot edit them.

Process: 2019 Grant Request Form			
Application	Submitted	11/14/2019	View Application
Decision	Undecided		

If your application is approved you may be assigned Follow Up reports to be completed and submitted through the system.

Helpful Tips

Users will be automatically logged out of the online system after 90 minutes of inactivity. The user will receive a warning message 10 minutes before time out.

Please remember to regularly save your work. The system will auto save every 20 minutes.

We recommend you prepare your response in a Word document first, then copy and paste the text into the online form.

Please download copies of all your submitted applications to your computer.

Only one file can be uploaded per question. If there are multiple files, they can be combined into one file.

An application can only be submitted when all required questions have been answered and all required files have been uploaded.

Once your application has been submitted, it is no longer available for editing. If you need to make a correction to a submitted form, contact Community Impact Coordinator Annette Williams at awilliams@sonomacf.org.