

Grant Application Portal Guide

COMMUNITY
FOUNDATION
SONOMA
COUNTY



Welcome to the Community Foundation Sonoma County online grant portal

Click [HERE](#) to watch a tutorial on how to use our online grant application portal.

To Login our online grant portal

The grant application portal can be accessed by clicking the GRANTEE LOGIN button on the top right of our website www.sonomacf.org:



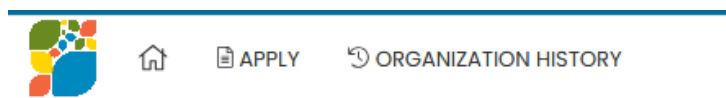
- If you have already created an account, enter your information and click **Log On**. If you forgot your password, click **Forgot your password** to reset your password.
- If you are a new user, click **Create New Account**. You'll be asked to complete registration information for yourself and your organization.


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 on the registration page.

Using the Upper Navigation Bar

There are several actions an applicant can take from the upper navigation bar:



- Click the **Home icon**  to navigate back to your dashboard.
- Click **Apply** to navigate to the Apply page to start a new application.
- Click **Organization History** to view your organization's history.

To Apply for a grant

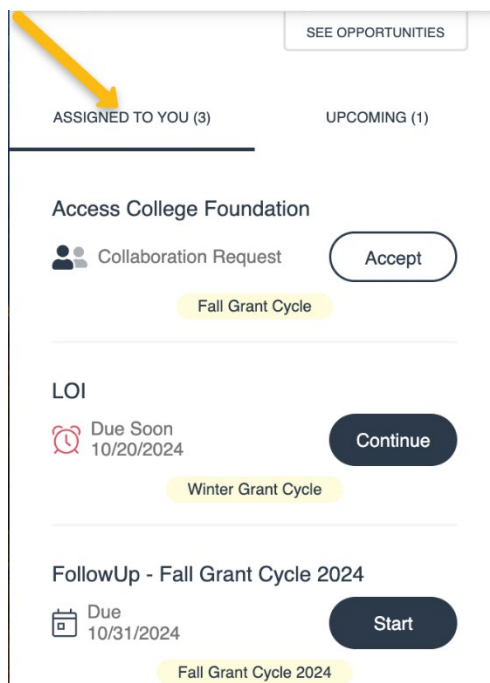
- On the Apply page you will see information about open grant programs. Some grant programs require an access code to start an application. If you were provided with an access code, enter it in the upper right-hand corner.
- Select the **Apply** icon on the far right of the page.

- Click **Preview** if you would like to preview the application without starting an application.
- Complete the questions on the application. Required questions are marked with an asterisk.
- The system automatically saves your work every 100 characters and when you click out of the question. You can click **Save** at any time.
- When your application is complete, click **Submit**.
- The system notifies you of any required questions that were missed. Complete those questions and then click **Submit** again.
- You will receive a confirmation message when the application is successfully submitted.

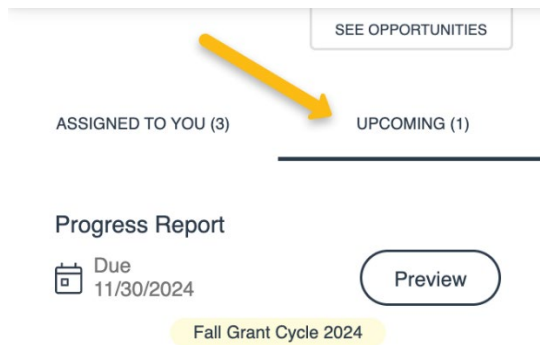
To Do Panel

The To Do panel on the far-left side of the applicant dashboard displays actions that can be taken on any active or collaboration requests assigned to the applicant. It contains two tabs, **ASSIGNED TO YOU** and **UPCOMING**:

- The **ASSIGNED TO YOU** tab is open by default and displays collaboration requests and any forms assigned to the applicant. Applicants can Accept, Continue, or Start any requests from this tab.
- The section is ordered by the due date if applicable; a red alarm clock icon 🕒 will appear next to forms that have a due date within the next two weeks.



- The **UPCOMING** tab displays any [sequential follow ups](#) that are upcoming but cannot be submitted yet.



The right side of your screen includes 3 sections: **Action Needed**, **No Action**, and **Historical**. The actions listed below can be taken from each column:

- Click on a request card header to go to the request summary and view any decision and award details associated with the request.
- Click the document drop-down menu to view and access all forms and files associated with the request.

