

Overview

This document is designed to provide grant applicants with instructions for use of the San Antonio Area Foundation’s online grant application system. 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. Please save every 15-25 minutes.**

Registration Page

If you already have an account:

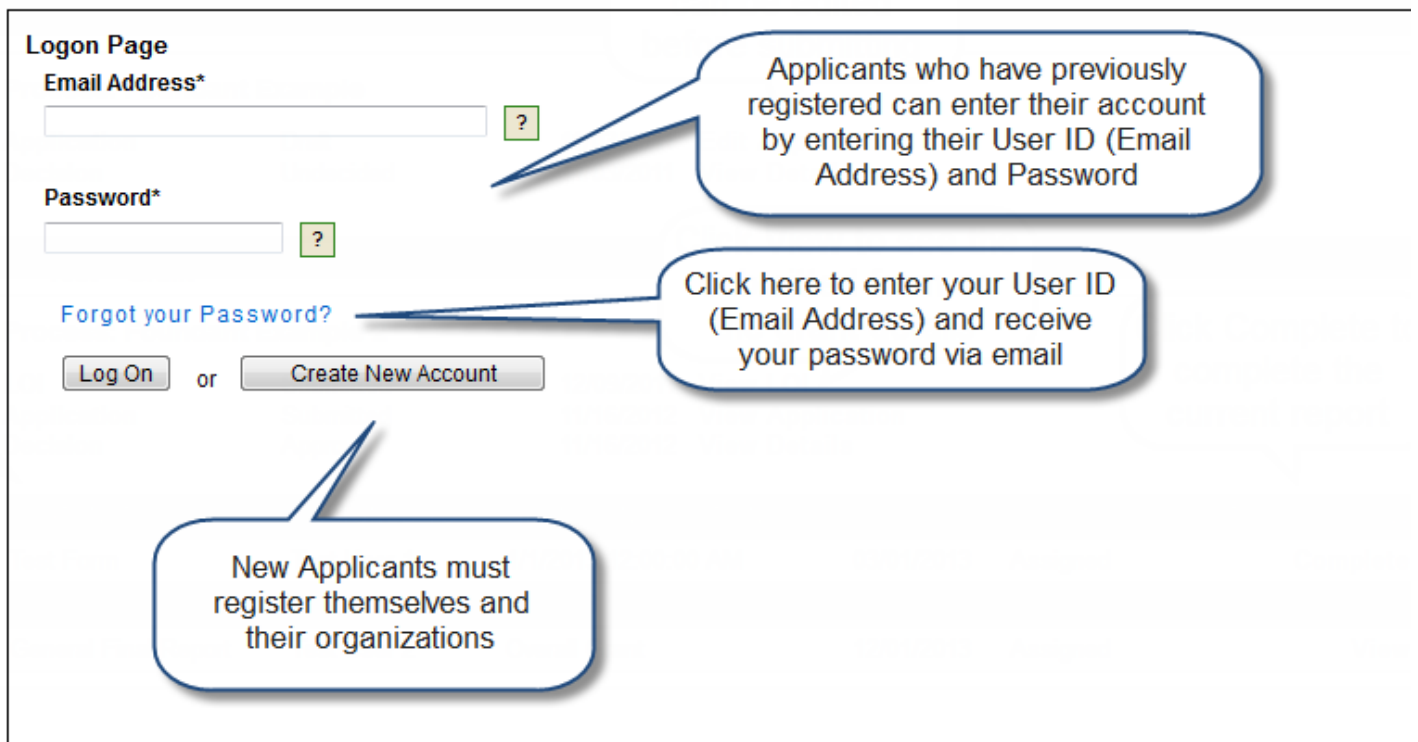
1. Enter your login, which is your e-mail address, in the Email Address field
2. Enter the Password that you chose when you set up your account.
3. Press the “Log On” button to enter the application system.

If you have forgotten your password;

4. 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;

5. Click on Create New Account to register.



Logon Page

Email Address* ?

Password* ?

[Forgot your Password?](#)

or

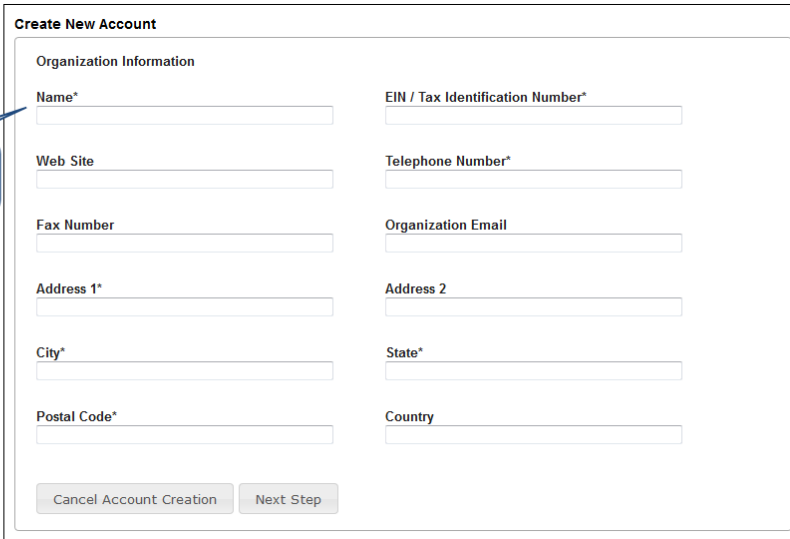
Applicants who have previously registered can enter their account by entering their User ID (Email Address) and Password

Click here to enter your User ID (Email Address) and receive your password via email

New Applicants must register themselves and their organizations

To register 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

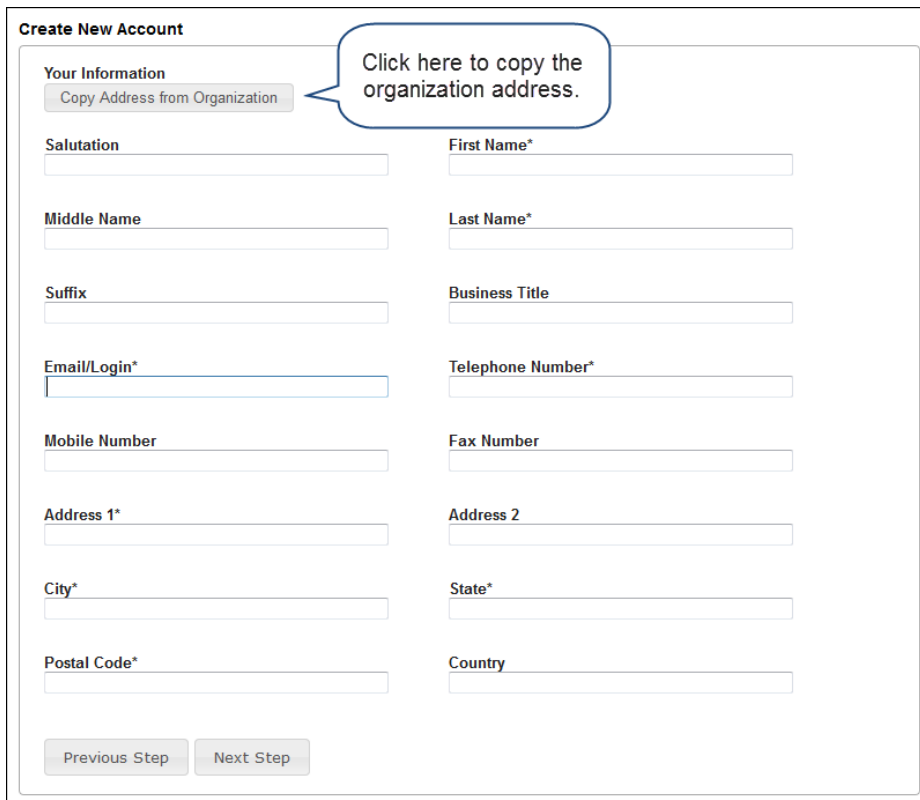
Address 1* Address 2

City* State*

Postal Code* Country

Required fields are marked with an asterisk.

3. Click on the Next Step button
4. Enter your contact information



Create New Account

Your Information

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

Click here to copy the organization address.

5. Click on the Next Step button
6. Indicate whether or not you are the organization's executive

Create New Account

Executive Officer

Are you the Organization's Executive Officer?*

Yes

No

7. Click on the Next Step button
8. Enter the organization executive information

Create New Account

Additional Executive Officer Information

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"/> |

9. Click on the Next Step button
10. Enter your password

Create New Account

Password

Password*

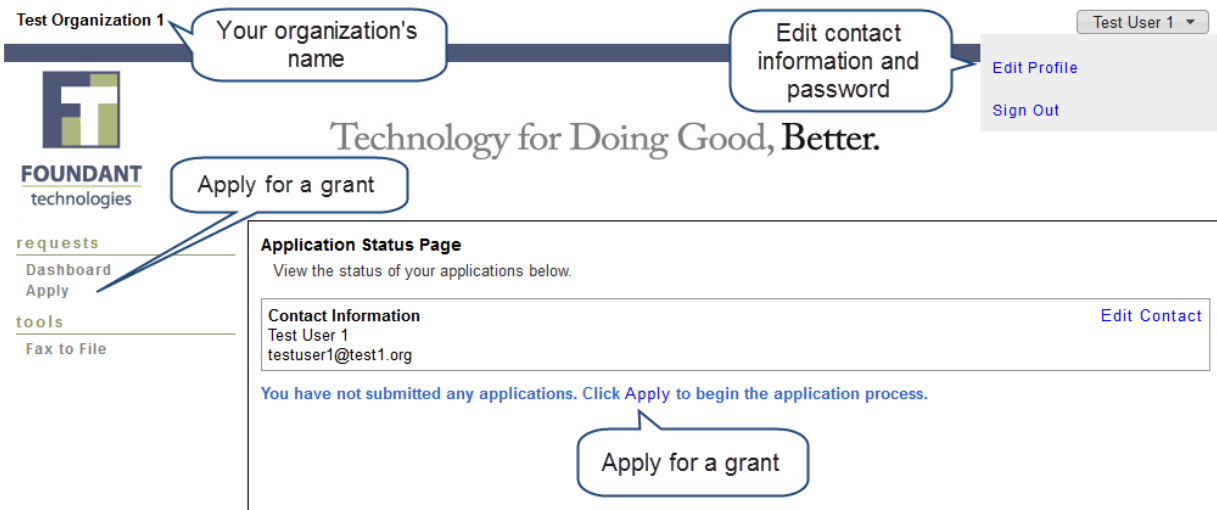
Confirm Password*

11. Click on the Finish button

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.

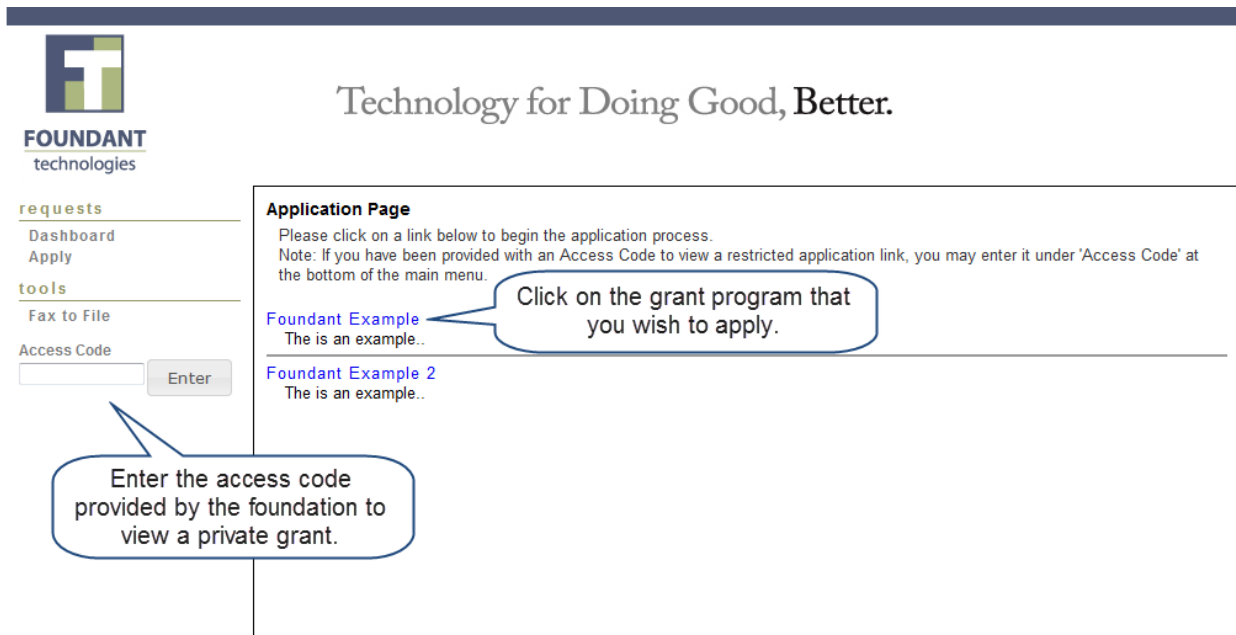


The screenshot shows the 'Application Status Page' for 'Test Organization 1'. The page header includes the organization name and a user dropdown menu for 'Test User 1' with options for 'Edit Profile' and 'Sign Out'. The main content area features the 'FOUNDANT technologies' logo, a navigation menu with 'requests' (Dashboard, Apply) and 'tools' (Fax to File), and a central section titled 'Application Status Page' with the text 'View the status of your applications below.' and 'Contact Information' for 'Test User 1' (testuser1@test1.org) with an 'Edit Contact' link. A message states 'You have not submitted any applications. Click Apply to begin the application process.' and a large 'Apply for a grant' button is prominently displayed. Callouts point to the organization name, the 'Apply for a grant' button, the 'Edit contact information and password' link, and the 'Apply for a grant' button again.

Choosing a Grant Opportunity

After clicking on the Apply link you will have the ability to choose a grant to apply for. Each grant 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 on the left and click Enter. This will allow your 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 FOUNDANT technologies website interface. On the left is a navigation menu with sections for 'requests' (Dashboard, Apply) and 'tools' (Fax to File, Access Code). The 'Access Code' section has a text input field and an 'Enter' button. A callout bubble points to this field with the text: 'Enter the access code provided by the foundation to view a private grant.' The main content area is titled 'Application Page' and contains instructions: 'Please click on a link below to begin the application process. Note: If you have been provided with an Access Code to view a restricted application link, you may enter it under 'Access Code' at the bottom of the main menu.' Below this are two links: 'Foundant Example' and 'Foundant Example 2', both with the text 'The is an example..'. A callout bubble points to the 'Foundant Example' link with the text: 'Click on the grant program that you wish to apply.'

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.
 - a. 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.

requests

- Dashboard
- Apply


tools

- Fax to File


Application Page

Current Process: Foundant Example

* = Required Field


[Application Packet](#)

Convert the form to a PDF file for printing.


[Question List](#)

Contact Information [Edit Contact](#)

Test User 1
test@address.com

Project Name*
Name of Project

Project Description*
Description of Project

[2000 characters left of 2000]

Amount Requested*
Amount Requested
\$

Organization Dates
What date was your organization established?

Mission
Please describe the mission of your organization in the space below.

[3000 characters left of 3000]

Board Member
Please type the list of Board Members in the area below or upload a document with the list.

[3000 characters left of 3000]
 [2 MB(s) allowed] MB Limit
[File Upload Status: No file uploaded.]

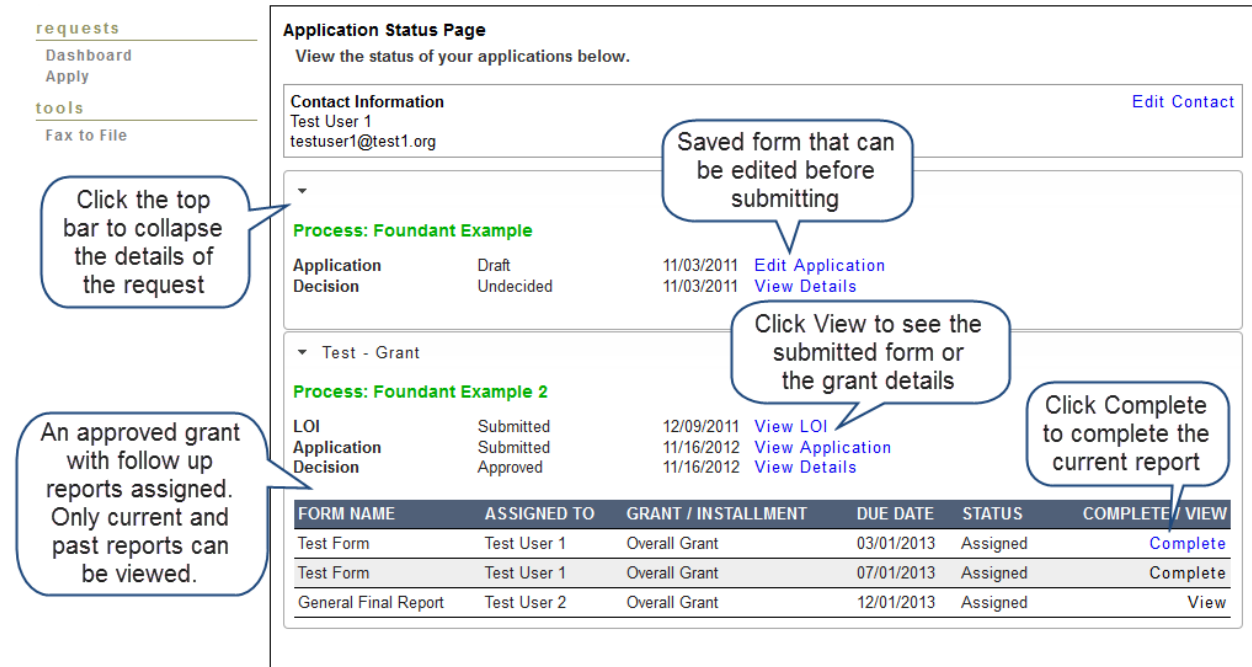
Save the form and keep working

Submit the form to the Foundation. Once submitted no changes can be made.

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 grant 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.



requests
Dashboard
Apply

tools
Fax to File

Application Status Page
View the status of your applications below.

Contact Information
Test User 1
testuser1@test1.org [Edit Contact](#)

Process: **Foundant Example**

| Application Decision | Status | Date | Actions |
|----------------------|-----------|------------|----------------------------------|
| Draft | Undecided | 11/03/2011 | Edit Application |
| Decision | Undecided | 11/03/2011 | View Details |

Test - Grant

Process: **Foundant Example 2**

| LOI Application Decision | Status | Date | Actions |
|--------------------------|-----------|------------|--|
| Submitted | Submitted | 12/09/2011 | View LOI |
| Decision | Approved | 11/16/2012 | View Application View Details |

| FORM NAME | ASSIGNED TO | GRANT / INSTALLMENT | DUE DATE | STATUS | COMPLETE / VIEW |
|----------------------|-------------|---------------------|------------|----------|--------------------------|
| Test Form | Test User 1 | Overall Grant | 03/01/2013 | Assigned | Complete |
| Test Form | Test User 1 | Overall Grant | 07/01/2013 | Assigned | Complete |
| General Final Report | Test User 2 | Overall Grant | 12/01/2013 | Assigned | View |

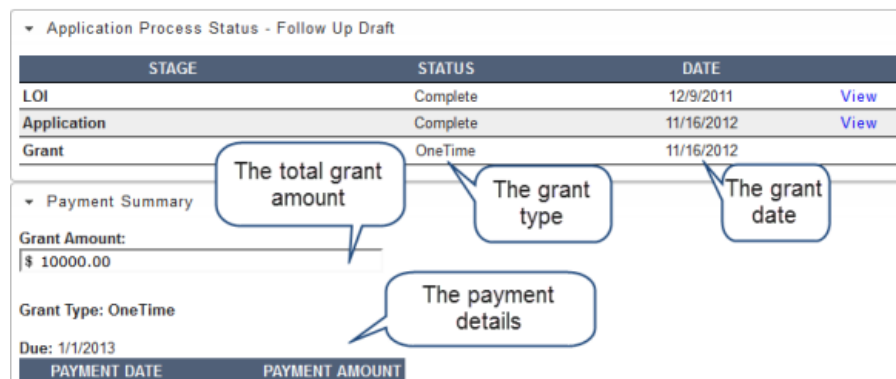
Callouts:

- Click the top bar to collapse the details of the request
- Click View to see the submitted form or the grant details
- Click Complete to complete the current report
- Click the top bar to collapse the details of the request
- Click Complete to complete the current report
- An approved grant with follow up reports assigned. Only current and past reports can be viewed.
- Saved form that can be edited before submitting

Viewing Decision Details

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

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.



Application Process Status - Follow Up Draft

| STAGE | STATUS | DATE | View |
|-------------|----------|------------|----------------------|
| LOI | Complete | 12/9/2011 | View |
| Application | Complete | 11/16/2012 | View |
| Grant | OneTime | 11/16/2012 | |

Payment Summary

Grant Amount: \$ 10000.00

Grant Type: OneTime

Due: 1/1/2013

| PAYMENT DATE | PAYMENT AMOUNT |
|--------------|----------------|
| | |

Callouts:

- The total grant amount
- The grant type
- The grant date
- The payment details