Online Grant Application Instructions

Site Access & Account Creation

Logon Page: You will access the system via the log on page which is accessible through the Foundation's "Online Application Information" webpage. It is recommended that you bookmark the log on page in your internet browser for ease of access.

Logon Page

Email Address*

jcooney@cfnwpa.org

Password*

•••••••••••

[Log On] [Create New Account]

Forgot your Password?

Welcome to the Catholic Foundation of Northwest Pennsylvania's Online Portal.

New Users: Please click on "Create New Account" to complete the registration process and create your logon credentials.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password?" link to the left to reset your password.

Not Sure? If you think that you or someone at your organization has already registered in the system, do not create a new account. Please contact our Operations Manager, Julia Cooney at jcooney@cfnwpa.org, to receive your username.

If you already have an account:
- Enter your email address and the password that you chose when you set up your account.
- Click the **Log On** button.

If you have forgotten your password:
- Click on the **Forgot Your Password?** link and enter your email address. You will be emailed a reset link.

If you are a new user and do not have an existing account:
- Click on the **Create New Account** button to set up your account.

CREATE NEW ACCOUNT:
- Creating a new account is a multi-step process;
  - with the first section collecting **Organization Information**;
  - the second section collecting **User Information**;
  - and sections three and four collecting **Executive Officer** information.

Create New Account

If you already have an Account, click the 'Cancel Account Creation' button to go to the Logon page

⚠ Using the browser's back button will delete your registration information.

ⓘ This registration process has multiple steps you must complete before you can apply.

Fields with an asterisk (*) are required.

Organization Information

In the section below, complete the information of the parish, school, or non-profit organization who wishes to apply for a grant. If you are applying on behalf of a department of the Diocese of Ere, include the department name with the organization name. For example: **Diocese of Erie – Office of Communications.**

Organization Name*

EIN / Tax ID (##-#######)*

Web Site

Telephone Number (###-###-#### x###)*

Organization Email

Address 1*

Address 2

City*

State*

Postal Code*

Country

Next >

- Required fields are marked with an asterisk (*).
- Provide the information of the parish, school, or non-profit organization who wishes to apply for a grant.
- If you are applying on behalf of a department of the Diocese of Erie, include the department name with the organization name. For example: **Diocese of Erie – Office of Communications**
- **EIN/Tax ID: Please enter the 9 digits separate by a hyphen (xx-xxxxxxx)**
- Enter the requested organization information and click the **Next** button to move to the next stage of the registration process.

● The next section is the "**User Information**" section, or YOUR information.
  ○ If your address is the same as your organization, you may use the **Copy Address from Organization** button to automatically pull the address information from the organization address fields into the address fields in this section.
  ○ It is very important to note that the email address entered in the **Email/Username** field becomes your (the applicant's) **Username** in the system**.**

- Once the fields on the "**User Information**" section are completed, click on the "**Next**" button.
  - Please note that 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. If you attempt to navigate to the previous section by using your browser's "back" button you will lose all registration information entered.

- In the next section you indicate if you are the Organization's Executive Officer (Pastor, Department Supervisor).
  - If you are the Executive Officer, select **Yes**. You are taken to a section of optional fields that include only those fields that were not required in the **User Information** section.
  - If you are not the executive officer, select **No** and complete the required Executive Officer fields.
- Once the Executive Officer's information is entered, click on the **Next** button to create a password.
- Password requirements are listed at the top of the section. Once the password is created, click the **Create Account** button.

Email Confirmation

Upon clicking **Create Account,** you will be taken to the **Email Confirmation** page. Follow the onscreen instructions and click the **Continue** button to finish the registration process. Now you have an account in the online grant management system. This is the account that you will use for both present and future applications.

Applying for Funding

Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open grant opportunities for which you can apply, as well as any relevant deadlines and other applicable information related to them.

- If you've been provided an access code by the Foundation, you may enter it in the upper right-hand corner to reveal the opportunity to which you have been invited.
- You may preview the application by clicking on the **Preview** button.

- To start an application, click on the blue **Apply** button under the grant opportunity to which you'd like to apply.
  - Clicking **Apply** will take you into a form to complete and submit.

Once in the application, note that your contact and organization information automatically populate at the top of the form.
- You may update your contact information and view your email history.
- If you would like, you can begin by printing the list of application questions as a reference. Click the **Question List** button in the upper right corner to download a PDF of the questions.
- Please note that if the application has a specific deadline, it will be listed at the top of the form.

Collaborator Feature

The **Collaborator** feature allows applicants to work together on a single request.

Once you have started a request you will see the **Collaborate** button at the top of the page. This can be used to invite other people to work on this request.

- From the **Collaborate** pop up, enter the email address of the person you would like to invite.
- Set the Permission you would like the collaborator to have, either View, Edit, or Submit.
- And lastly, include a message and select **Invite**.

An email will be sent to the collaborator containing your message, their username, and a link to the logon page. After clicking this link, the collaborator will be brought to the logon page. If this is their first time logging into the system, they will be asked to create a password.

After logging into the system, the collaborator will see this request under the **Collaboration Requests** tab of their **Applicant Dashboard**. Here they can select the edit form link and start collaborating on the document.

The Collaborator will have access to all forms within the request.
This includes Applications and all Follow Up Forms that have been assigned to the original applicant.

Completing the Application

Start completing the fields to answer the questions. Pay close attention to the instructions and limitations on each question.
- Note that any fields with an asterisk are required fields and must be completed prior to submitting the application.
- You may collapse question groups as you complete them.
  - Some fields have character limits. Responses that are longer than the set limit will be saved, **_but_** an error message will appear informing you that the limit has been exceeded. You will not be able to submit the form until the length of the response has been decreased in accordance with the limit.
- File **upload fields** will only accept one file per field.
  - Upload fields have size limits.
    - If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing you that the file is too large, and the file **will not** be saved.
    - Some upload fields may require certain types of files (.docx; .pdf; .xlsx)
  - Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.
- As you enter information into a field, the system will begin 'Auto Saving' every 100 characters typed or every time you click out of a field.
- Even though the system is auto-saving there is still a **Save** button at the bottom of the form.
  - When you click save you are taken to a confirmation page to confirm that the save was successful.
    - If you click **Continue**, you will be taken back into the form so you can continue working.
    - If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
      - Pick back up where you left off by clicking **Edit Application** link to the right of the request.
- Once you've completed the form, you may click the **Application Packet** button to download a copy of the questions and your responses.

After completing the application form, click the **Submit** button.
- If any required fields were not completed or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
  - An error message appears listing the fields that need to be completed or edited.
  - These fields are outlined in red so they are easy to identify as you scroll through the form.

- When a form is submitted successfully, you will be taken to a confirmation page. In addition, you will receive a confirmation email.

- When you click **Continue** on the confirmation page, you are taken to your dashboard where you can view your submitted request.
- Note that once an application has been submitted you can no longer edit it.

Applicant Dashboard

The applicant dashboard is your home page. When you log in to the online grants management system, you will be taken to the dashboard. You can return to your dashboard at any time by clicking the **Home** icon in the navigation menu.

From your dashboard, you can:

- View Active Requests and Historical Requests. The active request tab houses all current requests. These are the requests still requiring action, awaiting a decision and/or requests that have not yet been marked closed by the Foundation. Within each request you can see forms, form statuses and submission dates and, if applicable, form deadlines.
- You may continue working on saved forms by clicking the edit option next to the form.
- You may view forms that have been submitted. Please note that once submitted, you may not edit them.
- You can also see the request's decision status.
  - The status will be **"Undecided"** until decisions are posted.

If your request is approved, you may be assigned Follow Up Reports to be completed and submitted through the system.
- Follow ups are completed and submitted just like any other form.
- If you've been assigned multiple follow up forms, you must complete them sequentially by due date.

Denied requests and requests marked closed by the site administrator are housed in the Historical Request tab.
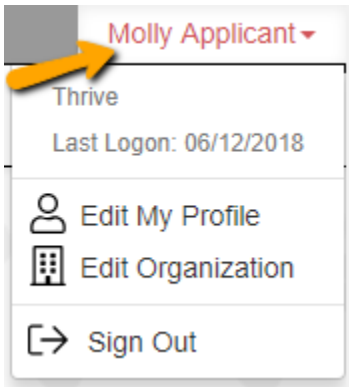
Edit Profile or Sign Out

If you wish to edit your account information or change your password, click your name in the top right corner. This will expand a drop-down menu. If you click **Edit My Profile**, you will be able to update your user information or change your password. Be sure to click save in the bottom right once you've finished. You may also update your profile information by clicking the pencil icon to the right of your name on your dashboard. If your organization information requires updating, please contact Julia Cooney, Operations Manager, at 814-824-1253 or jcooney@cfnwpa.org.

Notes:

1. Uploading Files:
   a. Only one file can be uploaded per question. Multiple documents may be combined into one file to be uploaded.
   b. It is recommended that you convert files into PDF format before uploading so that all formatting is retained. The **Fax-to-File** feature on the grant management site will also convert your documents to PDF format. Click on **Fax-to-File** for instructions.
   c. If you upload the wrong file, click on the red "X" and then upload the correct file.

2. If you remain on a page with inactivity for longer than 90 minutes, you will be logged off for security reasons. You will receive a warning message at 80 minutes of the pending time out.

3. Video tutorials created by Foundant may be found on the Catholic Foundation website 'Online Application Information' webpage.

Questions? Contact Julia Cooney, Operations Manager, at 814-824-1253 or jcooney@cfnwpa.org.