Applicant Guidelines for Using Foundant

Introduction

In 2020, The Champlin Foundation transitioned to using an application portal hosted by Foundant Technologies, Inc. This transition allowed all applications to be completed entirely online. This document is intended to provide a step-by-step guide to applicants on how to access and navigate the portal, review their organization's grant history, apply for a grant, and check on the status of their requests.

Your main point of contact for using Foundant is:

Heather Fraser
Grants & Systems Manager
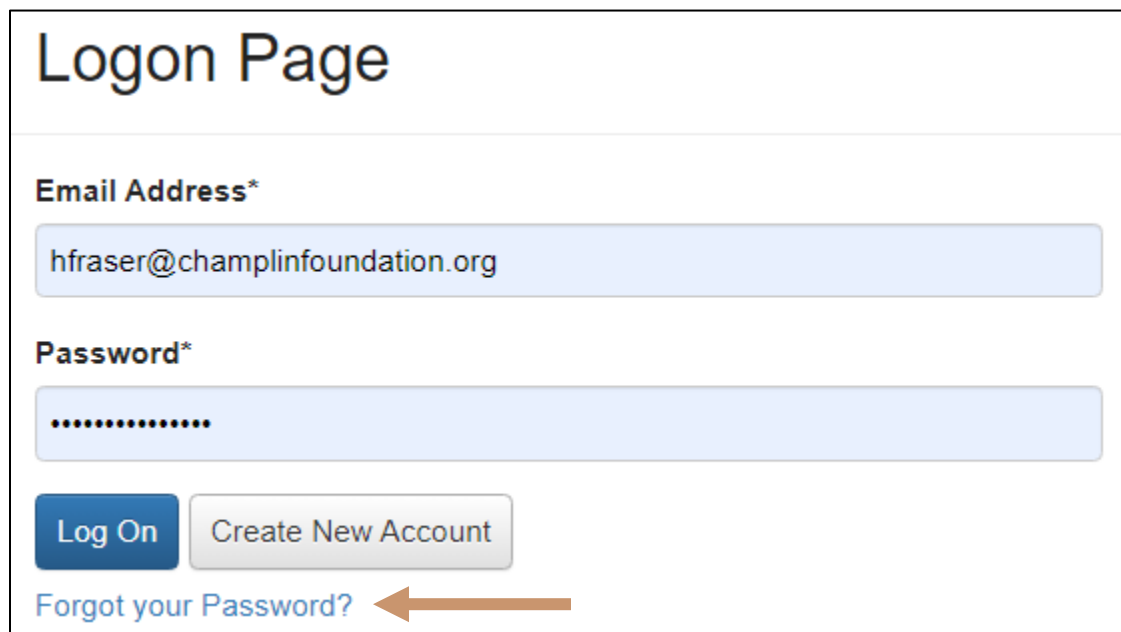401-944-9200 x115
hfraser@champlinfoundation.org

Signing into Foundant for the First Time

Resetting the Password

Open the Foundant logon page here:

https://www.grantinterface.com/Home/Logon?urlkey=champlin

Previous Applicants

Every organization that has applied for a grant from The Champlin Foundation between 2009 and 2021 has been entered into the system along with an identified contact person. If you have been receiving emails from The Champlin Foundation over the past year, you can move

forward with your registration into the online portal by selecting the **Forgot your Password** link. Please remember to use the email address to which we have been sending correspondence. This is your unique identifier in the system. If you try to reset your password and receive a message that the system does not recognize you, **please contact Heather Fraser to troubleshoot.**

Reset Password   ✕

To reset your password, enter your email address and click **Send Reset Link**

✉ Email Address

Cancel   **Send Reset Link**

New Applicants

If your organization has not applied for a grant from The Champlin Foundation in the last 10–years, or if you have not been receiving our emails, please contact Heather Fraser to receive your credentials. To be added into the system, you must provide the following: Organization Name; Organization Tax ID; User First and Last Name; User Business Title; User Phone and Email Address.

TIP: If you are unsure if your organization has applied in the past, or don't know if you are set up as a user, please contact Heather Fraser to ask.

Understanding Your Dashboard

Editing Your Contact Information

The first thing you will see when you log on is your Applicant Dashboard. We recommend reviewing both the Applicant and the Organization information prior to navigating further. If you notice information that needs to be updated, you can do so by clicking the pencil icons.

Applicant: ✏
Mr. Dwight K. Schrute III
dschrute@dundermifflin.org
401-555-1000
1725 Slough Avenue
Woonsocket, RI 12345   Contact Email History

You will notice that you <u>do not</u> have permission to change the name of the Organization you are applying for. If you find that this information is inaccurate, please email Heather Fraser with your corrections.

Active and Historical Requests

The tabs below your contact information will show you your **Active Requests** and **Historical Requests**. This will provide you with a snapshot of the applications you have submitted on behalf of the organization.

A request that is considered "Active" is one that

- ❖ Is in draft form prior to applicant submission
- ❖ Is pending a decision from The Champlin Foundation
- ❖ Has been awarded but the organization <u>has yet to fully spend the funds and/or submit a final Use of Funds report</u> to The Champlin Foundation

Each request can be expanded to see the details. In the example below, Mr. Schrute has 2 active requests. One has been approved and the other has been submitted and is awaiting a decision from the Foundation.

Furthermore, each request will show you any documents related to the grant award and any follow ups that have been assigned. In the example below, you can see that Mr. Schrute has successfully completed his first Use of Funds report but has a second report that is outstanding. This section will show you what reports have been assigned, to whom, and when they are due.

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE
Use of Funds Report - 1	Dwight Schrute	Overall Award	
Use of Funds Report - 2	Dwight Schrute	Overall Award	12/31/2020 Past Due

TIP: Applications, as well as the assigned follow-ups, are unique to each user. If more than one person needs access to edit, please refer to the Collaboration instructions

Organization History

For a complete picture of your organization's grant history with the Foundation, Select **Organization History** at the top of the page.

This will open your complete **Organization Summary** which allows you to access your Organization Information; Request History; Contacts; and Documents.

- ❖ **Organization Info**

  This is the basic organizational information we have on file. You can update this information by selecting the **Edit** button in the bottom right corner of the box.

- ❖ **Request History**

  This is the request history for your organization. Here you can see the grant status and the amount of any grants awarded. The grant statuses are as follows:

Application Submitted	Application was submitted by organization and is awaiting check for completeness
Application Complete	Application was checked for completeness and accepted for review
Evaluations Assigned	Application is in the review stage
Follow Up Draft	A Grant Agreement or Use of Funds report is pending
Approved	Organization was awarded a grant but has not yet spent the funds or sent a final report
Closed	Organization was awarded a grant, spent all funds, and submitted a final report
Denied	Grant request was denied
Abandoned	Organization withdrew the application for consideration

Please note that the grant history from 2009 on will show you those applications that were denied as well as the ones that were approved. The grant history prior to 2009 will only show you those applications that were approved.

❖ **Contacts**
This list will show you all employees that currently have access to log into Foundant on behalf of the organization. <u>Users only have permissions to edit their own information</u>. If you notice that another user information is incorrect, or if you see a user listed that is no longer working for the organization, please contact Heather Fraser with your requested changes.

⬍ NAME	⬍ TITLE	⬍ EMAIL	⬍ PHONE
Michael Scott	Executive Director	mscott@dundermifflin.org	401-555-1010
Dwight Schrute	Assistant to the Regional Manager	dschrute@dundermifflin.org	401-555-1000
Pam Beasley	Administrative Assistant	pbeasley@dundermifflin.org	401-555-5555

❖ **Documents**
The documents tab houses any documents that The Champlin Foundation has uploaded for your review. This information is visible to all users.

TIP: Note that contacts are never deleted from the system. They are simply marked Inactive. Users marked as inactive do not have access into the system

Applying for a Grant

You can apply for a grant by clicking the **Apply** link located at the top of the page. If you click on this prior to an application cycle opening or after an application cycle has closed, you will be directed to a blank page. Clicking on this link within an application cycle, however, will direct you a page that contains the Apply links for any grant programs that are accepting applications.

The most important thing to do once you arrive at this screen is to be sure you are completing the correct application for your organization. In Cycle 2, there are typically three unique applications for Traditional Grant Requests, Houses of Worship and Traditional Public Schools. Be sure to familiarize yourself with the criteria for your designated application by checking out The Champlin Foundation website.

🏠　📄 Apply　🕘 Organization History
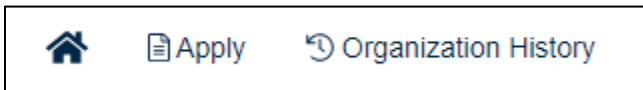
Preview

The preview button is a helpful tool that will allow you to view the form application in its entirety prior to opening an application. Once in preview mode, you can print out a PDF of the question list using the button located in the top right-hand corner of the screen. Please note that application previews can also be found on our website and on the Foundant login screen.
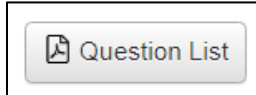
Send to GrantHub

Please note that GrantHub is a licensed product of Foundant Technologies, Inc. and is not affiliated with The Champlin Foundation in any way. If your organization is interested in learning about GrantHub, please reach out to Foundant directly. You do not need to purchase GrantHub in order to apply for a grant.
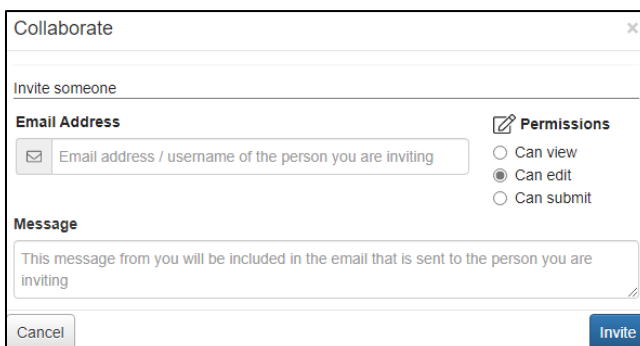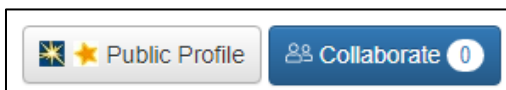
Collaboration

Each grant request is attached to only one user. This is automatically the person who began the application by hitting the Apply button as discussed above. Whoever begins an active application from your organization becomes the point person for all communications and all assigned follow-ups, including Grant Agreements and Use of Funds reporting. They become the primary contact for that application. As the system is not capable of cc'ing or bcc'ing individuals on a case-by-case basis, it is the primary contact's responsibility to share communications with the rest of their team as needed.

You can, however, open an application for collaboration and allow additional team members to view, edit and/or submit forms on the organization's behalf. Do this by using the Collaborate button found within the Application form.
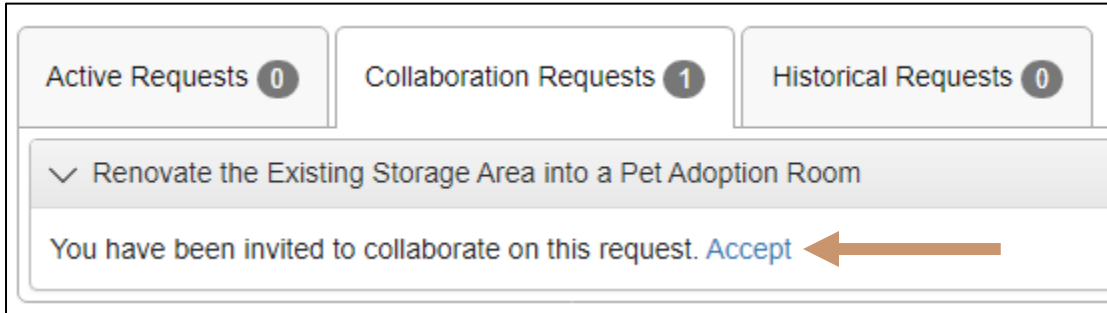
1. Click the **Collaborate** button

2. **Invite** a Collaborator (be sure to specify the permission level)

3. After the invitee logs into Foundant, they will access the **Collaboration Requests** tab and **Accept** the invitation to collaborate

TIP: You may want to use this function if you are working with an independent grant writer. All communications will come to the organization/primary contact, but the grant writer will have access to complete the application.