



Client Name

Apply Online Guide

This guide will walk you through the process of applying for funding from **Client Name**:

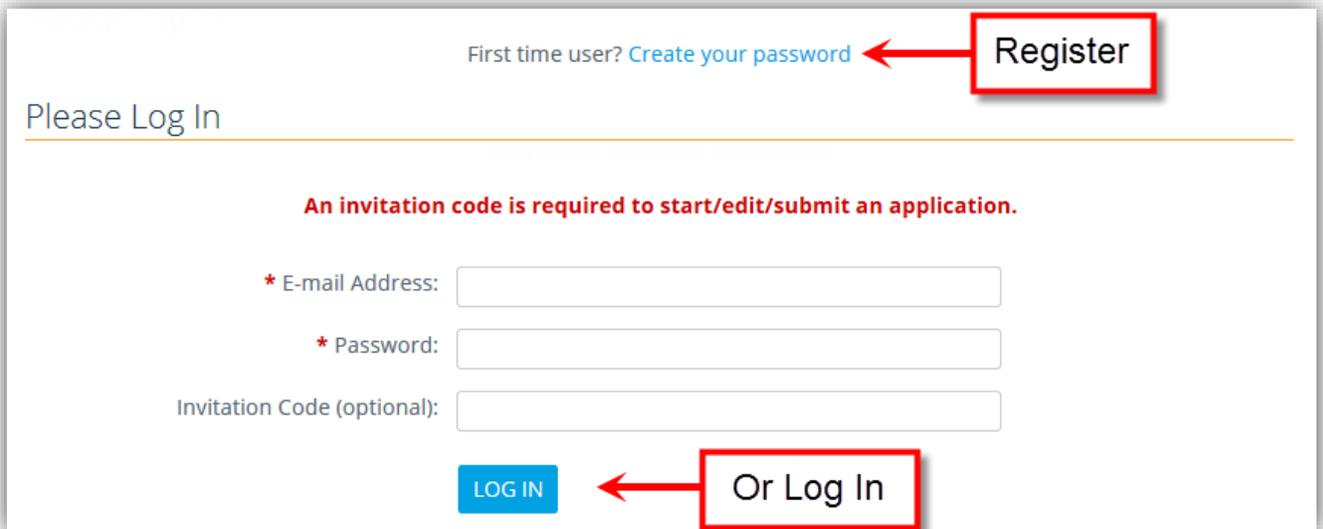
- Eligibility Quiz
- Registration/Login
- Application

Eligibility Quiz

The quiz consists of a series of questions that either directs you to the next question or a message indicating ineligibility.

An eligible answer leads to additional questions whereas an incorrect answer leads to a message that indicates ineligibility.

After completing the entire eligibility quiz, you will be brought to a message that you are eligible for funding, at which point you can register if necessary, or log into an existing account.



The screenshot shows a login page with the following elements:

- Top right: "First time user? [Create your password](#)" with a red arrow pointing to a red-bordered box containing the text "Register".
- Section header: "Please Log In" with a horizontal line below it.
- Message: "An invitation code is required to start/edit/submit an application." in red text.
- Form fields:
 - * E-mail Address:
 - * Password:
 - Invitation Code (optional):
- Bottom: A blue "LOG IN" button with a red arrow pointing to a red-bordered box containing the text "Or Log In".

Registration

First-time users will need to register an account before accessing the application. Basic user information is required.

Registration Information

* indicates required field

* First Name:

* Last Name:

* Telephone Number:

* E-mail Address: Please enter your e-mail address, e.g. yourname@yourdomain.com. You will need your e-mail address to log in.

* Password: The password must be between 6 and 16 characters long and consist of letters, numbers, or any of the following special characters: '@!#\$%&_'. The password "password" is not valid.

* Confirm Password:

* Invitation Code: Enter the invitation code given to you by the grantmaking organization.

* Organization Name: Enter the legal name of the organization for which you are applying.

Zip/Postal Code:

* Organization Country:

Based on your organization's country, you will need to enter a tax/charity ID. Public and private schools and school districts in the United States need to register with an NCES School ID and/or NCES School District ID. Some international organizations will not have a tax/charity ID to enter, which is fine.

IRS AND/OR NCES Information

Tax ID/Charity ID (if applicable): Enter the nine digit U.S. Tax ID of the 501(c)(3) non-profit organization for which you are applying. If you do not know the organization's Tax ID, please contact the business office of the organization or call the IRS toll-free at 1-877-829-5500. If your organization is not located in the United States or otherwise does not have a U.S. Tax ID number then leave this field empty.

School District ID (U.S. Pre-K-12 public schools and public school districts only): For U.S. public schools, the District ID should be the first 7 digits of a 12 digit National Center for Education Statistics (NCES) School ID. If you do not know the school's NCES information, please visit the [NCES](#) website.

School ID (U.S. Pre-K-12 public and private schools only): For U.S. public schools, the School ID should be the last 5 digits of a 12 digit National Center for Education Statistics (NCES) School ID. For private schools, the School ID should be the 8 digit NCES School ID. If you do not know the school's NCES information, please visit the [NCES](#) website.

If you attempt to register with a tax/charity ID that is either ineligible or unrecognized, you will get an error message indicating the reason:

Registration Information

* indicates required field

You are not eligible at this time to register on behalf of this organization because their Tax ID could not be verified.

Check with the organization in question to verify their Tax ID number. If the Tax ID number is correct and the organization has any questions concerning their Tax ID status or the specific 501(c)(3) subsection under which their organization is classified, they should contact the United States Internal Revenue Service (IRS) at their Cincinnati Call Center: 1-877-829-5500. The purpose of this call should be to:

- **Confirm their organization's tax exempt status**
- **Ensure that they will be listed on the next ELECTRONIC release of the Internal Revenue Service (IRS) Business Master File.**

The organization will remain ineligible to register until we can verify their tax-exempt status ELECTRONICALLY.

Possible reasons for this ineligibility include:

- **The organization has received its tax-exempt status too recently to be in the U.S. Internal Revenue Service (IRS) database. We update our database monthly and encourage you to check back with us then.**
- **The organization is otherwise listed incorrectly or missing in the U.S. Internal Revenue Service (IRS) database.**
- **You may direct the organization to peruse the exempt organization information available through the Statistics of Income (SOI) bulletin board.**

Please [contact support](#) if you have any questions.

If the organization is recognized as a record that already exists in the system, depending on the application settings, you may be blocked from adding yourself to that record and will need to reach out to our support center. They will be happy to assist you in creating an account for this organization record.

Existing Organization Detected

* indicates required field

It appears that somebody from your organization has already registered with us. Please [submit a support request](#) and our support team will assist you with creating your account.

Alternatively, you may be given the option to add yourself to the existing record.

Welcome Page

The organization's landing page is called the Welcome Page. This houses everything that pertains to the organization's record: tax information, submitted and unsubmitted applications, profile information, and impact reports (if applicable). The majority of the Welcome Page is meant to provide details regarding the specific application that is to be submitted. You will also see a "timeline" of the different sections within the application form.

[EDIT PROFILE](#) [LOGOUT](#)

Welcome, John Doe!

The organization you are currently associated with is HOPE WORLDWIDE LTD.

If you work with multiple organizations, [click here to add a new organization to your account](#).

The Charitable Donation application consists of several sections, each of which must be completed for your proposal to be considered.

1. Contact Information
2. Organization Information
3. Request Information

Once completed, all applications created are immediately submitted.

We recommend that you [familiarize yourself with the online application](#) before you begin. To create a new application, click the "Start a New Application" link at the bottom of this page. You may also save your applications now and return to work on them later. To continue work on an unsubmitted application, click the "Continue" link next to the application's Project Title. To view an application previously submitted, click the "View" link next to the appropriate Project Title.

Each page will have a timeline like the one below to help you monitor your progress. The line and text will indicate your current position within the application process. If you have technical questions regarding this application, use the link located at the bottom of every page to contact our support team.

Welcome Page	Contact Information	Organization Information	Organization Details	Compliance	Request Information
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Unsubmitted Requests

Action	Project Title	Application Date	Proposal Type	Application Amount
Continue	Community Outreach 	03/29/2017	Charitable Donation	\$25,000.00

Submitted Applications

Display activity for year: [2017](#) | [2016](#)

Action	Project Title	Application Date	Proposal Type	Application Amount	Status
View	Annual Gala	01/30/2017	Corporate Sponsorship	\$7,500.00	Submitted

[» START A NEW APPLICATION «](#)

Starting an Application

If the organization is eligible and the appropriate invitation code was used during login, you will have a "Start New Application" link at the bottom of the page. Clicking the link will begin a new request.

Contact Information Section

The contact section houses the organization's "Address Book." If there are existing contacts associated in this Address Book, they will be listed here whenever you start a new application. Although it is listed, it is not automatically selected. You can select any existing contacts or create a new contact, if necessary. The new contact listing will expand and the required fields must be completed:

Contact Information * indicates required field

* Salutation *(Mr., Mrs., Miss, Ms., Dr., etc.)*

* First Name

* Last Name

* Title

* Telephone

Email Address

After saving the new contact, it will be added to the Address Book. At least one contact MUST be associated with any request:

Contact Information * indicates required field

Match: Check the box to associate this individual with this application. Name: **JANE DOE**
 Telephone Number: 999-888-7777
 E-mail Address: jane@doe.com

Match: Check the box to associate this individual with this application. Name: **DIANA JONES**
 Telephone Number: 999-888-7777
 E-mail Address: diana@cyberg.com

Organization Information

Some of the information that was gathered during the registration process will pre-populate into the Organization Information section. This information lives on the organization profile itself; if the information is changed internally, it will change externally as well. It will also change on previously submitted requests. Essentially, this will always have the most current information as it pertains to the organization.

Some fields are hidden unless/until the answer to another question triggers it to display. For instance, if Country = United States, the State field will appear and be required.

Organization Information * indicates required field

* Legal Name

* Country

* Address

Address 2

* City

State

* Zip/Postal Code



If Country ≠ United States, the State field will disappear from the form and a Province field will appear instead.

Organization Information * indicates required field

* Legal Name

* Country

* Address

Address 2

* City

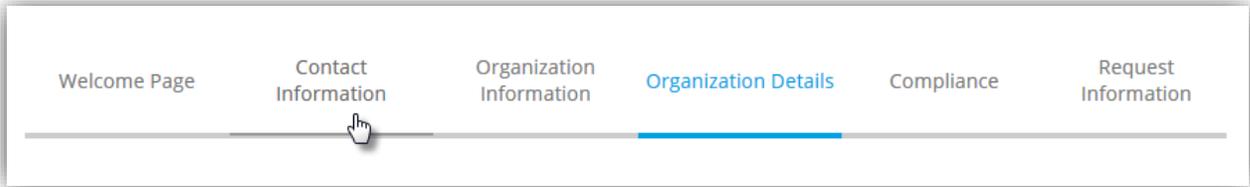
Province



Request Information

The questions asked in Requests Sections are specific to the actual request and must be completed each time a new application is started. Nothing will be pre-populated and all fields must be completed. Fields will differ based on what kind of application is being completed.

If you do not know the answer to something and have to come back to it later, click on the other sections on the Timeline to jump ahead or jump back. You can also leave the application completely by clicking the Welcome Page tab:



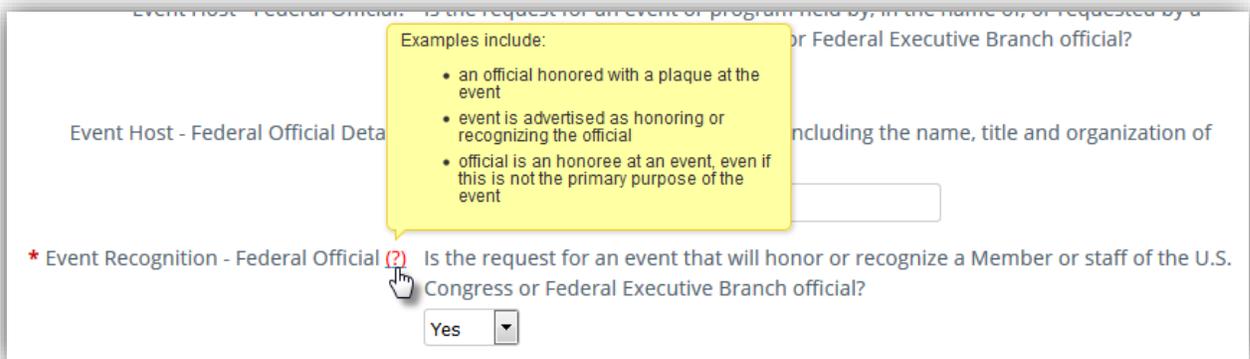
The work will be saved unless there is invalid data (e.g. letters in a number field); the system will not produce error messages unless the “Save and Proceed” button is clicked. It is highly suggested that you always click “Save and Proceed” before using the Timeline to navigate elsewhere.

If you need to log out and then come back to continue the application, the unsubmitted request will be on the Welcome Page under the “Unsubmitted Requests” header with a “Continue” link; the date the application was started and the kind of proposal will display along with a Project Title and Requested Amount if those fields have been completed:

Unsubmitted Requests				
Action	Project Title	Application Date	Proposal Type	Application Amount
Continue	Community Outreach 	03/29/2017	Charitable Donation	\$25,000.00

Tool Tips

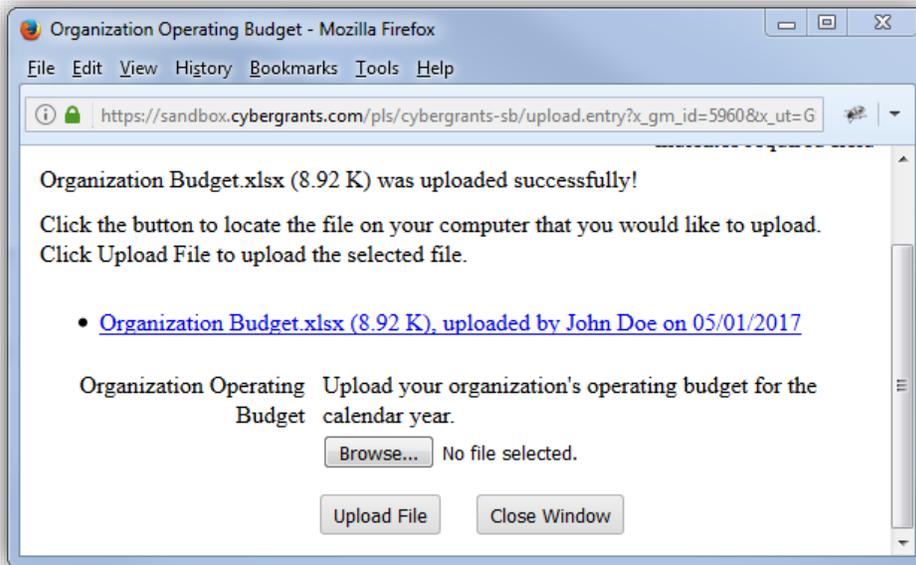
For fields that require extra explanation, hover over the tool tips icons (?) to display additional information:



Upload Fields

Files are uploaded in a separate window; pop-up blockers should be disabled. A new window will open when you click the “Upload File” button:

Once a file has successfully been uploaded, a confirmation message will display within the pop-up window and the file will be shown as a downloadable link. Click “Close Window” to return to the application page:

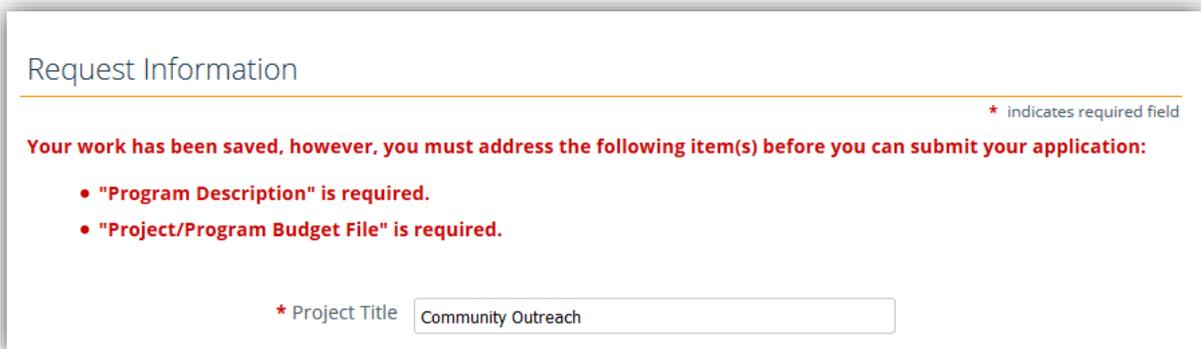


Error messages will display if one of the following occurs:

- File is too large
- File is corrupted (“Scan Error Detected”)
- File is in an unacceptable format

Error Messages

If you save a section that is missing a required field or if you enter invalid data, a specific error message will display accordingly:



After files have been upload they will display as downloadable links. They will also be stamped with the date and the grantseeker's name. To remove a file, click the "Delete" link.

* Organization Operating Budget Upload your organization's operating budget for the calendar year.

[UPLOAD FILE](#)

- [Organization Budget.xlsx \(8.92 K\)](#), uploaded by John Doe on 05/01/2017 [\[Delete File\]](#)

Review

After you get to the last section of the request, clicking the "Save and Proceed" button will direct you to a Review Page. If any of the required fields are invalid or incomplete, an error message will display and you can click on the links to jump to the sections that need to be finished.

Incomplete Application

* indicates required field

You have not filled in the following required fields. Click on the section name to return to that section and then provide valid responses to the following questions. These fields must be completed in order to submit your application

- [Organization Information](#)
 - Organization Type
 - State
- [Organization Details](#)

Otherwise, you will be brought directly to the Review Page. This is a one-page read-only view of everything that has been entered.

You will be warned at the top of the page that if you choose to submit you will not be able to make any additional changes. If you see anything that needs to be changed, click on the Section header to jump to it and make the necessary changes:

Review Your Application

Please review your proposal information. If you are not ready to submit your proposal at this time, click the "Save Only" button. The proposal will then be available to edit from the Welcome page. Clicking the Submit button will immediately send the application and you will then be unable to perform further editing.

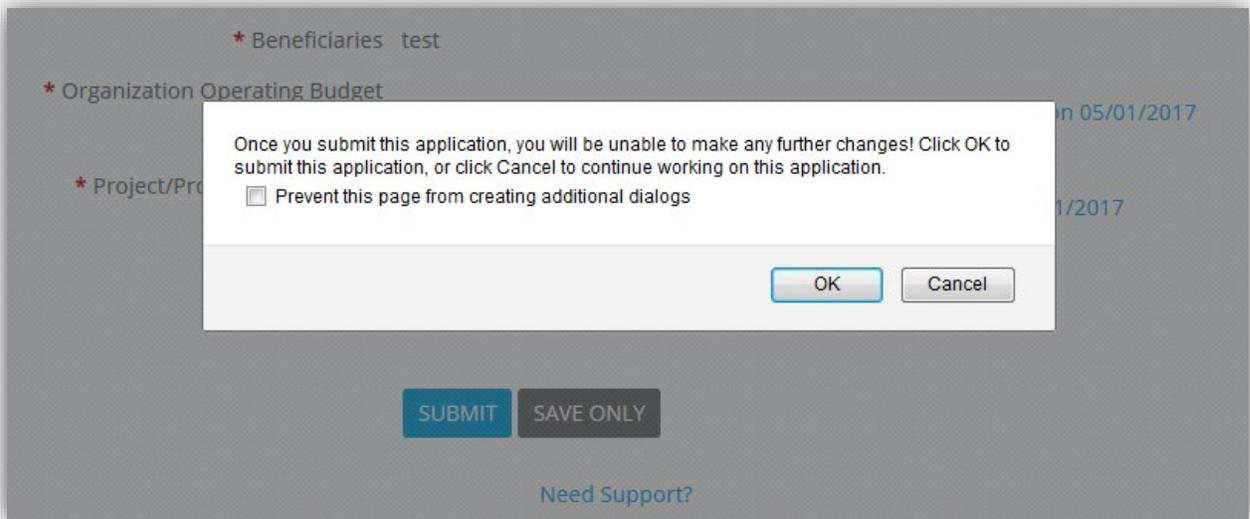
[Contact Information](#)

* Salutation Ms.
* First Name Jane
* Last Name Doe
* Title Treasurer
* Telephone 999-888-7777
Email Address jane@doe.com

Organization Information

* Legal Name HOPE WORLDWIDE LTD
* Country United States
* Address 1285 DRUMMERS LN STE 105
Address 2
* City WAYNE
State Pennsylvania
* Zip/Postal Code 19087-1572

Once the Submit button is clicked, another final message will pop up with a last warning that once the application is submitted, no changes can be made.



Once submitted an immediate confirmation page will display. Additionally, an automated email event will be triggered and sent to the grantseeker's email address.

Confirmation of Application Receipt:

Your proposal was successfully submitted. No further action on your part is required and you can expect to receive notice of your proposal's status shortly. To print a copy of this completed application go to 'File', then 'Print' on your browser toolbar. Click here to [return to the homepage](#) when you are finished.

After returning to the Welcome Page, the request will have moved to the Submitted Applications portlet with a status of "Submitted." This status will change as it moves through the approval process:

Submitted Applications

Display activity for year: [2017](#) | [2016](#)

Action	Project Title	Application Date	Proposal Type	Application Amount	Status
View	Community Outreach	03/29/2017	Charitable Donation	\$25,000.00	Submitted