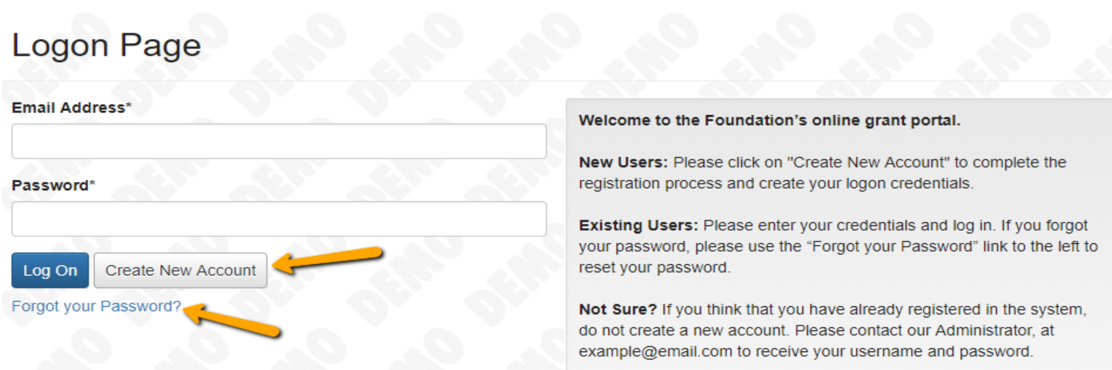
McHenry County Mental Health Board Grant Lifecycle Manager
Applicant Tutorial

VIDEO 1: Site Access & Account Creation

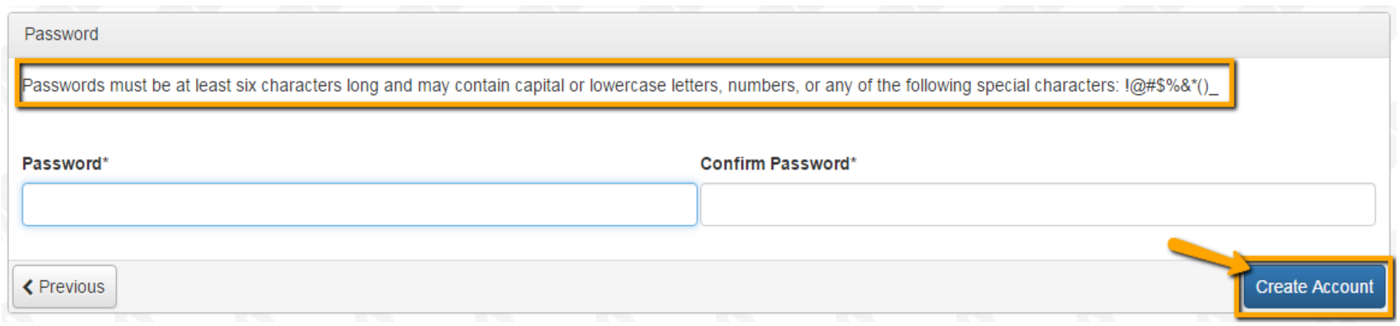
You will access the system via the log on page. The Foundation may have provided you with a link to this page, or it may be hyperlinked on their Foundation website. It's recommended that you bookmark this page in your internet browser for ease of access. If you've already created an account you may enter your email and password and log right in. Otherwise, you'll want to click on the Create New Account button. If at any time after creating an account, you can't remember your password, you may click on the Forgot Your Password button, enter your email address, and you will be sent a link to reset your password.



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.
- After Organization Information has been entered click on the "**Next**" button.
- The next section is the "**User Information**" section, or YOUR information.
  - If your address is the same as your organization's 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 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 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 their 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.

    - If you are the executive officer, select “**Yes**.” You are taken to a section of optional fields that includes only the 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, so the applicant can create their password accordingly.
- Once the password is created, the applicant clicks the “**Create Account”** button.

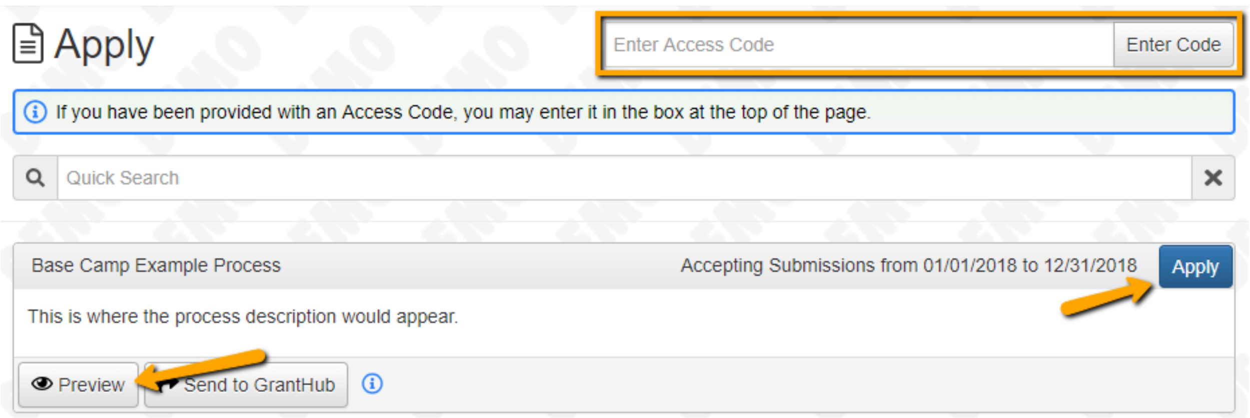


EMAIL CONFIRMATION:
Upon clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system. Follow the onscreen instructions and click the “Continue” button to finish the registration process. Now you have an account in this system, and remember, this is an account that you will use for both present and future applications.

VIDEO 2: 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 opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them.

- If you’ve been provided an access code, you may enter it in the upper right-hand corner to reveal the opportunity you have been invited to apply to.
- You can preview the application without having to save any work by clicking on the “Preview” button.
- To start a request, click on the blue **“Apply”** button under the opportunity you’d like to apply to.
    - Clicking Apply will take you into a form to complete and submit. Depending on the Foundation the form will likely be an LOI or Application. In this example, you are taken directly into the application.



Once in the form, note that your contact and organization information automatically populates at the top of the form.

- You may update your contact information and view your email history.
    - If the Foundation allows applicants to update organization information you will see the edit icon next to the Organization Information.
    - If not, you must contact the Foundation directly to change organization information.
- If you'd like a PDF copy of the application, you can click the Question List button.
- Once you've completed the form, you may click the Application Packet button to download a copy of the questions and your responses.
- Please note that if the form has a specific deadline it will be listed at the top of the form.
    - Depending on the Foundation you may or may not be able to submit after the deadline has passed.
        - If the past due message is reflected in orange, you may still submit the form.
        - If the past due message is reflected in red, you no longer have the option to submit the form.
            - If you are not allowed to submit, you will receive a message should you attempt to submit.

Work your way through the form responding to the fields.

- Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you've finished all of the questions in that group, as an indicator to yourself that you've completed that section and reduce scrolling.
- Some fields have character limits.
    - Responses that are longer than the set limit will be saved, ***but*** an error message will appear informing the applicant the the limit has been exceeded.
        - You will not be allowed 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 the applicant that the file is too large and the file **will not** be saved.

- Upload fields may also have File Type restrictions.
  - If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
- 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.

- 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 so you know 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**" link to the right of the request.

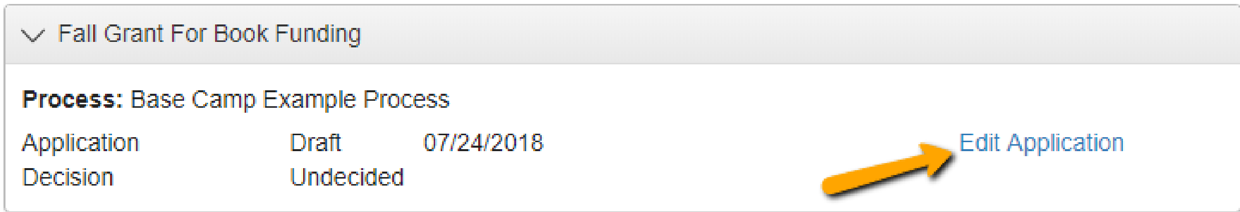
- You may abandon the request if it is the first form to be submitted for this request.
  - Once the first form, either an LOI or Application, has been submitted you must contact an administrator to withdraw the request from consideration.
  - After selecting Abandon Requests, you must type in Abandon Request and select OK
  - The request will then be visible in the Historical Requests tab just as it would if an administrator had abandoned the request.

When all of the fields are complete, submit the application.

- 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 the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
  - When the you click "**Continue"** 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.

VIDEO 3: Your Applicant Dashboard
Your dashboard houses current 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 site administrator. 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 but note that once submitted you can not edit them.
- You can also see the request's decision status.
    - The status will be "Undecided" until the site administrator posts a decision.
        - Timing on decision status updates vary depending on the foundation.

If your request is approved you may be assigned Follow Up Reports to be completed and submitted through the system.

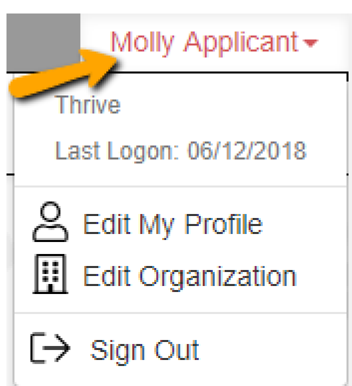
- Follow ups are completed and submitted just like any other form.
- If you've been assigned multiple follow up forms, you must complete them sequentially by due date.
- Follow ups that are past due will be marked as such.
    - If the past due message is reflected in orange, you may still submit the form.
    - If the past due message is reflected in red, you no longer have the option to submit the form.

Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Award Agreement	Molly Applicant	Overall Award	05/31/2018 Past Due	Assigned	Edit

Denied requests and requests marked closed by the site administrator are housed in the Historical Request tab.

If you wish to edit your account information or change your password, click your name in the type right. 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.

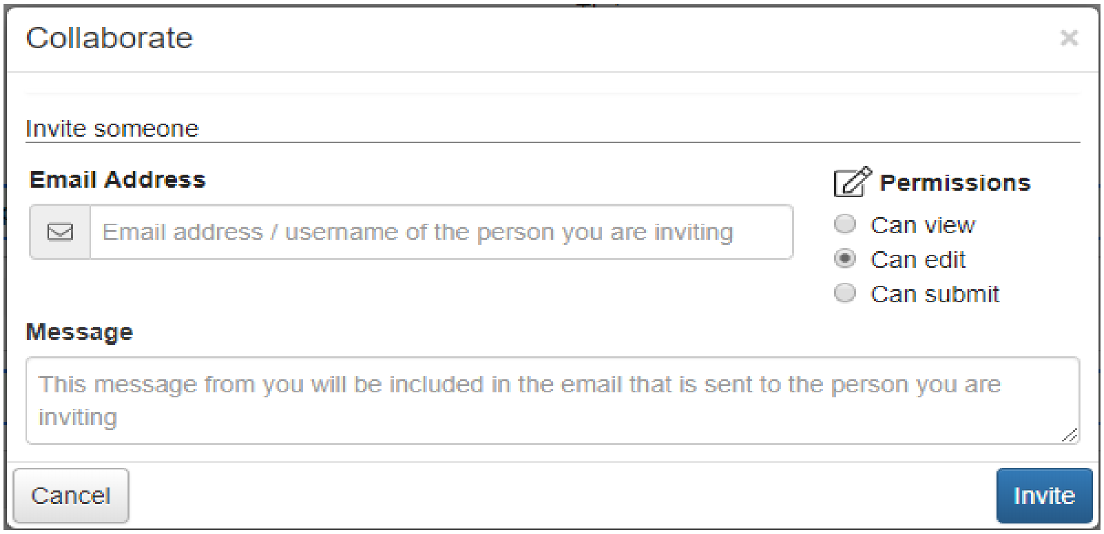


Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending "time out").

VIDEO 4: Collaborator Feature

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

- From the Collaborate pop up, enter the email address of the person you would like to invite, this can be someone who already has an account in the system, or a new user.
- 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 LOIs, Applications, and all Follow Up Forms that have been assigned to the original applicant.

Key Points

- Once an applicant has started a request they will see the Collaborate button at the top of the Request Summary.
- Collaborators permissions can be set to either View, Edit, or Submit.
- The Collaborator will have access to all forms within the request including Follow Up Forms that have been assigned to the applicant.

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Adding New Users to Your Organization

The Collaborator feature can be used to add a new user to your organization without contacting the sites Grant Administrator. The following steps will walk through this process.

1. From any existing or new Request, select the Collaborate button on top of the Form page.
2. From the Collaborate pop up, enter the email address of the person you would like to invite to your Organization, and change the Permission for this Collaborator to View, and then
3. And lastly include a message to this new user and select send. Feel free to use the following message.

    Dear _____,
    The link above will invite you to create an account within our Organization. Please follow the above link, enter your name and password, and then select the Apply button. From here you can choose our Organization name and complete the final registration process.
    Thanks,

4. Once the new user has received their invitation email they will want to follow the link to the log on page.

You have been invited to collaborate on Fun Run Race For The Cure by Molly Applicant (MollyApplicant@Invalid.email.com).

Your username is: BaseCamp@Foundant.com

You can register or log on here.

5. From here the new user will be asked to create a profile by entering their Name and password, and will then be brought to the Applicant Dashboard.
6. In the top navigation menu select the Apply button. The user will be asked to complete a full registration.
7. A notification will appear stating that registration must be completed prior to applying for a request.
8. Select Complete Registration, and select your organization from the organization drop down menu.
9. Complete the required registration fields, and select save at the bottom of the page.