Davis Family Foundation

Online

Application

Guide

Getting started *Login or create an account…*

If you have an *existing account* from a previous grant round, enter an **email** and **password.**

If this is your *first time applying* to the Foundation *using the online application*, create an account here.

Helpful Tip Your organization should only have one account. We recommend an info@... email address.

Contact Us | Exit

Please Sign In

- If you have an applicant account, please log in using your E-mail Address and Password.
- If you forgot your password, please click the "Forgot Password" link to send yourself a reset.
- First time applicants, please use the "New Online Applicant" link found below.

E-mail

New Online Applicant?

Password

Forgot Password?

Login

Click *Login* to start your new application.

What if you *forgot your password*? Click here to receive an email with a new password.

The <u>email address</u> associated with your online account will receive notification when:

You create an account
You save a draft of your application
You submit your application
You click "Forgot Password"
Your grant completion report is due
You save a draft of your grant report
You submit your grant completion report

Before You Begin

This is the page you will see when you log in. Please review these instructions carefully.

① Before You Begin	② Organization Information	③ Contact Information	④ Proposal Information	⑤ Attachments	⑥ Signature Page	⑦ Review My Application

Before You Begin

Printer Friendly Version | E-mail Draft

✳ *Required before final submission*

Submission Deadlines:

Applications must be submitted by 5pm EST February 10, May 10, August 10, or November 10. Applications for deadlines that fall on a holiday or weekend must be received by 5 pm the next business day. Trustees meet in March, June, September, and December to consider requests. The Foundation normally notifies applicants of the Trustees' decision within one week of each regular meeting, and applicants receiving grants may expect to receive payment within a month of notification. Organizations that receive grants from the Foundation are required to submit completion reports.

If you have questions, please visit the Foundation website FAQs before contacting the Program Officer.

Instructions:
1. Navigate through the application with the "save and finish later" or "next" buttons at the bottom of the screen. You may also click on the page title tabs at the top of your screen to toggle between pages. (Do not use the brower's back or forward arrows at the top left of your browser. You will lose your information.)
2. When cutting and pasting from a word document, bold, bullets, italics, underlining, colored text etc. will not carry over.
3. Fields marked with a red * are required.
4. When you save your work, you will receive an email notification with information on how to return to the saved draft.
5. You will have the opportunity to review your completed application on the final page. Select the SUBMIT button to send your completed application to the foundation. You will receive an email confirmation with a copy of the application.

Please remember to **SAVE** your work using the Save & Finish Later button at the bottom of the page.

Navigating the Application

Navigation Tabs guide you through the application. Select one to go to that page.
The page you are on is **bold and highlighted**.

Click *Exit* to log out.

Print or *email* the application with these buttons.

You can *save* your application at any time and return to it later, or proceed to the *next* page. This is at the bottom of every page except the last.

Helpful Tip Save your application often. This will not log you out, but will take you to your account homepage.

Uploading Attachments

Step 1 -- Click "Browse" to select your document

✳ 1. Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.

[   ] Browse...

[Upload]

Step 2 -- Click "Upload" to attach your document

✳ 1. Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.

[   ] Browse...

[Upload]

Step 3 – You will see the document name, date uploaded, and file size when it is attached

✳ 1. Current IRS determination letter clarifying applicant's 501(c)(3) and 509(a) status.

File Name	Uploaded	Size
Sample IRS Determination Letter.docx	7/19/2017 3:07 PM	12KB

[Remove]

Your Account Homepage

When you select the "Save and Finish Later" button, you are taken to your account page.
You will also get to this page when you log into your account once your application is in process,
and when you login to submit your completion report, if awarded.

When you log in to your account you land on the "*Applications*" page.

If awarded a grant, grant reports are posted under the "*Requirements*" page. Click the button to navigate to that page.

The *drop down menu* allows you to select to view your In Progress or Submitted applications or Requirements.

Applications	Requirements

Applications

Welcome to your Applicant Account page! This is where you will manage your work.

1. Select **In-Progress** or **Submitted** from the drop down menu to view your applications.
2. If you select In Progress, you will be able to continue working on your saved application.
3. To delete an application you do not intend to submit, click the trash icon next in the Actions column.
4. You may e-mail drafts and transfer ownership of an application using the Action icons.

Show In Progress Applications
Submitted Applications
☐ Hide Viewer Only Applications

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action

Troubleshooting

Problem	Solution
I am signed in to my account but I can't find where to start a new application.	Even if you have an existing account, all new applications MUST be started by clicking the "New Application" link found on the *Apply* page of the website.
Our **staff has changed**, and we lost our login information.	Contact staff to update your account to a new email address. Using "info@..." or a more generic account for your organization may help alleviate this problem in the future.
One of my documents **will not attach**.	Chances are your file is too big (no 990s please!). Sometimes using a PDF can help. If it continues to fail to attach, please contact staff for assistance.

Contact: Katie Paye, Program Officer   kpaye@davisfoundations.org   (207) 846-9132 x 13
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