

# Davis Family Foundation



## Online Application Guide

# Getting started *Login or create an account...*

*Please note: If you have applied to the Davis Conservation Foundation you should use the same login information for Davis Family Foundation.*

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.

The screenshot shows a web form titled "Please Sign In" with a dark green background. At the top right, there are links for "Contact Us" and "Exit". The form contains the following elements:

- Text: "Please Sign In"
- List of instructions:
  - 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.
- Input fields: "E-mail" and "Password"
- Buttons: "New Online Applicant?", "Forgot Password?", and "Login"

Blue arrows from external text boxes point to the "E-mail" field, the "New Online Applicant?" button, the "Login" button, and the "Forgot Password?" button.

Click **Login** to start your new application.

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

*The email address 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 browser'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.

The screenshot shows the top navigation bar for the Davis Family Foundation application. The header includes the logo and the text "Davis Family Foundation". Below the header is a navigation menu with seven tabs: 1. Before You Begin, 2. Organization Information (bold and highlighted), 3. Contact Information, 4. Proposal Information, 5. Attachments, 6. Signature Page, and 7. Review My Application. To the right of the navigation menu are links for "Contact Us", "FAQs", and "Exit". Below the navigation menu is the main content area, which is currently displaying "Organization Information". A note on the left states "\* Required before final submission". On the right side of the content area, there are two buttons: "Printer Friendly Version" and "E-mail Draft".

*Print* or *email* the application with these buttons.

Save & Finish Later

Next

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.

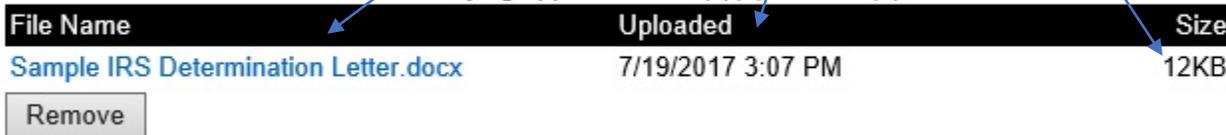


Browse...

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
<a href="#">Sample IRS Determination Letter.docx</a>	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.

The screenshot shows the 'Applications' page interface. At the top, there are two tabs: 'Applications' and 'Requirements'. Below the tabs, the page title is 'Applications'. A welcome message reads: 'Welcome to your Applicant Account page! This is where you will manage your work.' Below this, there are four numbered instructions: 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. On the right side, there is a 'Show' dropdown menu with 'In Progress Applications' selected and 'Submitted Applications' as an option. Below the dropdown is a checkbox labeled 'Hide Viewer Only Applications'. At the bottom, there is a table header with columns: Application Name, Project Title, Requested, ID, Last Updated, My Role, and Action.

Application Name	Project Title	Requested	ID	Last Updated	My Role	Action
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# Tips for the Online Application:

- We encourage you to cut and paste your narrative responses from a word processing application to ensure work is not lost. The Online Questions Preview document on the right side of the “Apply” page under "Downloads" can be used for this purpose.
- Save your work frequently as you are filling out the application.
- Click the "Next" button at the bottom of each page to move through the application. You may also click on the page title tabs at the top of the application to toggle between pages. Do not use your browser's back and forward arrows.
- The Foundation does not have access to your draft applications.
- After each deadline, any unsubmitted applications will be deleted.
- Click on the "Review My Application" tab at the top of any page to view the application in its entirety. The fields will be populated with your completed answers. You will have a final chance to review and amend your work prior to submission.

# Troubleshooting

<b>Problem</b>	<b>Solution</b>
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 <b>MUST</b> be started by clicking the "New Application" link found on the <i>Apply</i> page of the website.
Our <b>staff has changed</b> , 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 <b>will not attach</b> .	Chances are your file is too large. Sometimes using a PDF can help. If it continues to fail to attach, please contact staff for assistance.

Contact: Katie Howard, Program Officer  
Lisa Smith, Grants Associate

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