



# COMMUNITY FOUNDATION FOR THE ALLEGHENIES

## How to Register and Log-In to Grant Applications

Welcome to our new online grant application system! Even if you have applied for a CFA grant before, you are most likely a new user for this system, launched in May 2020.

**All new users** must first register by clicking “Create New Account” on the Log In page. After you register for the first time, you will be a “Returning User” and you will log on to the system using your e-mail address and the password. Please do not create a second, new user account. **If you are a CFA Fund Representative** applying for a grant using your CFA Fund as the organization, please refer to the back page of this document before registering an account.

### The Registration Process

The registration process has four sections: (1) organization information, (2) your individual user information, (3) executive officer information, and (4) your individual user password. (Once this information is entered, it can be edited, if needed.) It will carry over into future applications and grant reports. This system also utilizes online grant agreements.

Your user account ID is your e-mail address. Each individual user is linked to a single organization. If you are a volunteer or employee who typically submits applications for multiple organizations, you will need to register separately using a different email address for each organization. If you are a grantwriter who typically submits applications for multiple organizations, the organization’s contact person should register the account and then add you as a “Collaborator” when they begin the application so that you can have access to their application.

During the four-step registration process, you need to enter all of the contact information requested, so gather all required information before beginning the registration process.

### Updating Your Registration Information

To update your own user information at a later time (after registration), click on your name at the top right corner of the screen and select “Edit Profile” from the menu.

To update your organization’s or chief executive officer’s information, contact Emily Wood at [ewood@cfalseghenies.org](mailto:ewood@cfalseghenies.org) or 814-208-8448.

### The Application Page

After you have registered you will be directed to the Application Page. Here, you will see a list and description of all grant application opportunities that are currently open. Near the top left of the screen, you will see a house icon. This is your homepage or dashboard. Click it to see the registration information that you created and to check the status of any grant requests.

## Navigating the Online Grant Management System

- **Apply for a grant** by clicking the blue “Apply” button in the application description.
- **Manage your grant application** by clicking the “Dashboard” (house icon) toward the top left side of the screen. The Application Status Page provides information regarding the status of open grant applications. From this page, you can download completed application forms and see the status of an application form you have submitted. If you have saved but not submitted an application form, you must access the form on this page to complete and submit the form.
- **Manage your awarded grants** by clicking “Dashboard” (house icon) toward the topleft side of the screen. The Application Status Page provides information regarding awarded grants. From this page, you can see whether or not a grant has been awarded and complete required follow-up forms for awarded grants. The term “follow-up” is used to describe either a grant agreement or a final grant report.

## Uploading Files

- In general, the **acceptable file types** for uploading files are: Microsoft Word/Excel and Adobe PDF (PDF) files.
- Only **one file can be uploaded per question**. Multiple documents must be combined into one file and then uploaded.
- If the document(s) that need to be attached to your form are not electronic or you need to combine multiple documents into a single file, our online system gives you the option to **“Fax to File.”** If you have access to a fax machine from which to send your files, this is an easy-to-use tool that will convert documents from hard copy to digital format as a PDF file. You must be able to send a fax for this tool to work.
  1. Click “Fax to File” in the menu at the left side of the screen and read the instructions.
  2. Select “Request a Fax #”; a toll-free number will appear on the page.
  3. Load a document, or multiple documents that need to be consolidated into one file, into your fax machine.
  4. Dial the toll-free number. Send a separate fax for each individual file you wish to create.
  5. Select “Finished Faxing” when you are done and to see your list of files.

# Online System Tips

## Things to Know

1. The **character counter** includes spaces as well as characters. Note: this is a character count, not a word count.
2. A user will be **automatically logged out** of the online system after 90 minutes of inactivity. The user will receive a warning message at 80 minutes of the pending time out. Working on a form without saving does not count as activity.
3. Please remember to **regularly save your work**. The system will auto-save every 20 minutes.
4. You may choose to **prepare your response in a document outside of the online system (e.g. Microsoft Word)** and then copy and paste the text into the online form. If you prepare your application in this way, be sure to keep track of character limits. As noted above, character limits include spaces and characters. We recommend that you do not use formatting tools, as available in Microsoft Word, because the formatting will likely not transfer to the response area when pasted into the online system.
5. It is advisable to download copies of all **submitted forms** to your computer.
6. If you do not provide an answer for one of the **required questions**, you will not be able to submit your application.
7. If your **PDF upload file exceeds the maximum file size**, consider using the Adobe Acrobat option to "Reduce File Size."
8. Remember to **click "Submit Form"** when you are finished.
9. **Once your application has been submitted** it is no longer available for editing. If you need to make a correction to a submitted form, contact Emily Wood at [ewood@cfalleghenies.org](mailto:ewood@cfalleghenies.org) or 814-208-8448.

### If You Are a CFA Fund Representative:

When you register, please use your FUND NAME as your organization and the head of your organization/committee as the executive director, with that person's pertinent contact information. (If you had previously applied in our old system, you would have used the CFA as the organization and Mike Kane as the executive director, but that is no longer the case.) In addition, when you enter your organization's EIN, please use this placeholder: 00-0000000.