

Website: www.montereypeninsulafoundation.org Email: grants@mpfca.org Telephone: 831-649-1533

Online Portal Guide

This guide provides assistance when using the <u>online portal</u> to apply for grants and complete reports for previous grants awarded by Monterey Peninsula Foundation. Before using the online portal, please review Monterey Peninsula Foundation's <u>Grant Guidelines</u> for more specific information about our grant review process.

Before You Begin

Prior to logging in to the online portal, please clear your browser's cache (then restart the browser). The cache should include temporary internet files and cookies.

Internet Explorer:	Tools > Delete Browsing History
Firefox:	History > Clear Browsing Data
Chrome:	Press CTRL+H and click on Clear Browsing Data
Safari:	Safari > Preferences > Advanced > Show Develop menu in menu
	bar: 🗹. Develop menu > Empty Caches





Internet Explorer browser users: If experience login issues, it may be necessary to manually delete your browser's temporary internet files and restart the browser.

- 1. Go to **Tools** > **Internet Options**.
- 2. On the General tab in the Browsing History section, click Settings.
- 3. Click **View Files** to open a browser window for the **Temporary Internet Files** folder.
- 4. Select all files (CTRL+A) and delete them.
- 5. Close the file browser window.
- 6. Click **OK** to close the **Website Data Settings** window and **Internet Options** window.
- 7. Restart your browser.

Updated 8/19/15

Mozilla Firefox, Google Chrome, or Apple Safari users: Make sure that you are updated to the latest version. These browsers should update automatically, but you can check which version you have by doing the following:

Firefox:	Go to Help > About Firefox
Chrome:	Go to Customize > About Google Chrome
Safari:	Choose Apple menu > Software Update

Creating an Account

In order to access the online portal, all applicants must create an account to have access to grant applications and grant reports, and allow applicants to share this information with others.

Please Sign In		
Welcome to the Monterey Peninsula Fo	undation online portal.	
 For returning applicants, please log-in us For new applicants, please click on "New work and continue at a later time. 	ing your email address and password. Applicant?" to create a password. This	will allow you to save your current
E-mail	Password	
	New Applicant?	Forgot Password?
	Login	

On the next page, fill out the required information, then click **Continue**. Keep the log-in information in a secure location for future use. If you lose your password, you may change it by clicking **Forgot Password**?

New Applicant?
An account allows you to access your saved and submitted applications at any time. If also allows us to send you a submission confirmation e-mail and notify you if additional information is necessary to process your application.
E-mail
Confirm E-mail
Password (must contain at least 5 characters, with both letters and numbers)
Confirm Password
Continue

Completing a Grant Application

The online portal is designed to allow applicants to work on a grant application at their own pace including filling out the application at one time, completing a portion and saving the rest to be finished later, sharing the application with others, or just previewing the entire application.

Before You Begin		
hank you for your interest in the Montere	y Peninsula Foundation.	
efore you begin:		
 visit the Monterey Perinsula Polification Available on our website are budget tem grant application, and helpful hints for g Monterey Peninsula Foundation does not Only complete applications from eligible their application is complete. Organizatio Applications should be submitted 60 day funding. Beginning in 2015, the Foundati applications and make funding decisions Make sure to save your work every 15-2 complete. To access all saved or submitted application.com to your 	Website to Ferview our Grant Sundenines. plates, a guide to navigating the Online Pc rant seekers. I have deadlines and accepts grant applica organizations will be considered for funding ons may only be considered for funding on s before the Grant Committee meeting at 1 or Grant Committee meets in March, Jun 20 minutes, as this grant application may t ations and reports, please log-in to the Onli safe senders list to ensure receipt of our e	ortal, an FAQ for the recent transition to an online ations throughout the year. g. Applicants should make every effort to ensure ce per twelve-month period. which an applicant hopes to be considered for ne, September, and December to review time out if it takes longer than 20 minutes to nline Portal. amails.

Note: Applicants should make every effort to save their work every 15-20 minutes, as the grant application may time out if it takes longer than 20 minutes to complete.

Applicants may move between tabs at the top of the screen by clicking on any tab or by selecting **Next** at the bottom of the page.

Before You Begin 2 Organization 3 Grant Request 4 Financials 5 Authorization 6 Review My Application
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Applicants are required to fill out the entire grant application. All required fields are indicated with a red asterisk (*). An application cannot be submitted without entering all of the required information. Please remember to select **Save & Finish Later** before leaving an application on the bottom of any page to ensure that work is not lost.



Updated 8/19/15

After completing all of the tabs, click **Review & Submit** to review the entire grant application before submitting.

We, the undersigned, her	eby state that the information provided in this application is
complete and factual. By	typing our names below and submitting this application, we
confirm our authority and	have notified and secured approval from all necessary parties. We
hereby agree that funds,	if granted, will be used only for the purpose described above
unless written approval fi	om Monterey Peninsula Foundation is received.
 Signature of Authorized E Signature of Additional Ai	oard Member
(Example: Lead Staff Person)	Ithorized Representative
* Date	
	Save & Finish Later Review & Submit

On the next page, review the entire grant application for completeness and click **Submit** to submit your grant application. After hitting **Submit**, applicants will no longer be able to modify the application.



Logging-In

Applicants are able to <u>log-in</u> to view in-progress and submitted grant applications, as well as new, inprogress, and submitted grant reports.

Please Sign In	
Welcome to the Monterey Peninsula Foundation online po	rtal.
 For returning applicants, please log-in using your email addre For new applicants, please click on "New Applicant?" to creat work and continue at a later time. 	ss and password. te a password. This will allow you to save your current
E-mail	Password
New Applicant?	Forgot Password?
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Viewing Grant Applications

To view, continue, and submit in-progress grant applications, please log-in and select the dropdown menu on the upper right hand side and select **In Progress Applications.**

Applications Requirements				
You may access your applications by selecting either "In Progress" or "Submitted Applications" from t online reporting)	he "Show" menu on	the right side of the page.	(Click the Requirements tab t Show H	o view information related to In Progress Applications
Monterey Peninsula Foundation Grant Application	20104	06/05/2014	Owner	2 a a a a a a a a a a a a a a a a a a a

To view submitted grant applications, select **Applications** in the upper left hand side. Then select the dropdown menu on the upper right hand side and select **Submitted Applications**. The portal does not allow applicants to modify submitted applications. If you have changes, please contact us.

Applications Requirements					
You may access your applications by selecting either "In Progress" or "Submitted online reporting)	Applications" from the '	'Show" menu on th	e right side of the page. (Cli	ck the Requirements tab to vie Show Su Hide V	w information related to bmitted Applications
Monterey Peninsula Foundation Grant Application		20072	05/15/2014	Owner	# 6 🛱

Viewing Grant Reports

Once a grant is awarded, the primary contact's email address linked to the original grant application is assigned a grant report. Grant reports must be completed within one year of the grant's award date.

To view and complete a grant report, log-in to the Online Portal and click **Requirements** in the upper left hand side. Then select **New Requirements** in the dropdown menu on the upper right hand side.



If your organization cannot find the assigned grant report or are unsure that a report has been completed or assigned, please contact us to request assistance.

If your organization has changed the primary contact managing the grant awarded, please have the original primary contact transfer the report to the new primary contact using the Online Portal (see "Ownership of Grant Applications or Reports" on pg. 6). If the primary contact is no longer available, please contact us to request assistance.

To review in-progress grant reports, click **Requirements** in the upper left hand side, then select **In Progress Requirements** in the dropdown menu on the upper right hand side.

 You may access your Grant Reports by select Applications tab to view information related t 	ing "In Progress" or "Submitted Requirements" o online applications.)	from the "Show" menu on the righ	ht hand side of the pa	age. (Click the
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			Show In Progress	Requirements
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onterey Peninsula			Hide Viewer O)nly Requireme

To view submitted grant reports, click **Requirements** in the upper left hand side, then select **Submitted Requirements** in the dropdown menu on the upper right hand side. The portal does not allow applicants to modify submitted reports. If you have changes, please contact us.

Applications Requirement Requirements	3						
 You may access your related to online appl 	r Grant Reports by selec ications.)	ting "In Progress" or "Submitted Req	uirements" from the	e "Show" menu on the rig	ht hand side of the page. (Cl	ick the Applications tab t Shove Submit Hide View	o view information ted Requirements • er Only Requirements
Grant Outcome Evaluation Report	Samo Walet	Outcome Eval. Report	32610	05/15/2015	05/16/2014	Owner	₽ © ₽

Ownership of Grant Applications or Reports

The current owner of a grant application or report can transfer ownership to another user by clicking the **Transfer to new owner** icon in their account page. Enter an email address and then click the **Check Email** button to see if the account already exists or not. Click **Transfer** to immediately send the transfer request to the new owner.

Applications Requirements Applications				
You may access your applications by selecting either "In Progress" or "Submitted Applications" from the "Show" menu on the right side of the page. (Click the Requirements tab to view information related to online reporting)				
			Show	In Progress Applications •
			• F	lide Viewer Only Applications
Monterey Peninsula Foundation Grant Application	20117	07/08/2014	Owner	🐉 of 📋 📼
Monterey Peninsula Foundation Grant Application	20125	07/08/2014	Owner	# e 🗊 📼

The owner of a grant application or report can also add new viewers, see the current viewers list, remove people from the viewers list, and modify the email notice sent to new viewers. Once a user has viewer rights, they can enjoy them until the current owner removes that access. If one owner makes someone a viewer, then transfers ownership, that viewer still has access. To remove one or more viewers from a grant application or report, the owner can check one or more check boxes to the right of the viewer(s) and click the **Remove** button.