



# Applicant Tutorial

## Online Grant System

### How to use CBT's Online Grant System

#### LOGON PAGE

You will access the system via the log on page. 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 will be sent a link to reset your password.



Investing in the Clayoquot Sound Biosphere Region since 2000.

#### Logon Page

Email Address\*

Password\*

Log On

Create New Account

[Forgot your Password?](#)

Welcome to Clayoquot Biosphere Trust's new online grants system!

**First time here?** Please click on "Create New Account" to complete the registration process and create your login. Be sure to keep this login information for your organization's records. If you need assistance, please refer to the training materials by clicking [HERE](#).

**PLEASE NOTE:** Each organization will have one profile and can associate different users with that profile.

# CREATE AN ACCOUNT

Creating a new account is a multi-step process, including different sections:

- 1<sup>st</sup> section: collecting **Organization Information**
- 2<sup>nd</sup> section: collecting **User Information**
- 3<sup>rd</sup> and 4<sup>th</sup> sections: collecting **Signing Authority Information**

**NOTE:** To navigate to a 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 the browser’s “back” button you will lose all registration information entered.

## Section 1 - Organization Information

After entering all the information required in this section, click on the “**Next**” button.

The screenshot shows a web form titled "Organization Information". It contains several input fields and a "Next" button. The fields are arranged in two columns:

- Organization Name\*** (left) and **CRA Registration Number (e.g. 123456789RR1234)** (right). Below the CRA field is a note: "If you are a registered charity enter your registration number here. Not sure? Check the CRA listings here. Questions about your eligibility? Check our criteria here."
- Website** (left) and **Telephone Number (###-###-#### x###)\*** (right).
- Organization Email** (left) and **Mailing Address 1\*** (right).
- Mailing Address 2** (left) and **City\*** (right).
- Province or Territory\*** (left) and **Postal Code (e.g. A1A 1A1)\*** (right). Below the province field is a note: "Province must be entered using the two character abbreviation in all caps (e.g. AB for Alberta). Prince Edward Island should be entered as PEI."

At the bottom right of the form is a blue button labeled "Next >". Below the form are three tabs: "User Information", "Signing Authority Question", and "Signing Authority Information".

## Section 2 - User Information

- If your address is the same as your organization 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.
- **IMPORTANT:** The email address entered in the **email/username** field becomes the Applicant’s **Username** in the system.

Once all the fields on the **User Information** section are completed, click on the “**Next**” button.

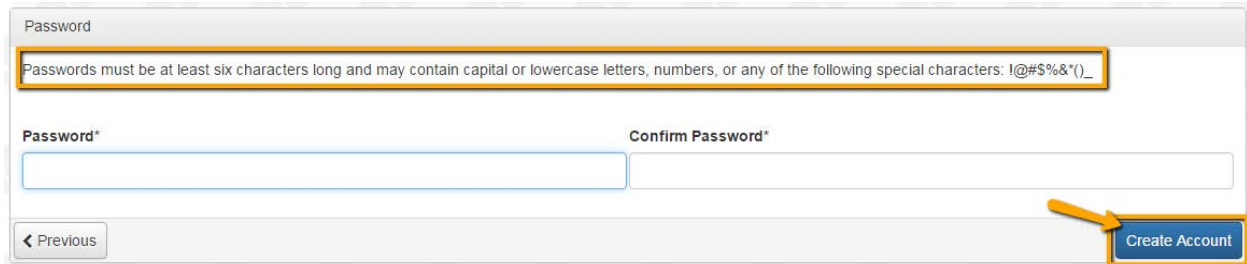
## Section 3 – Signing Authority Information

In this section you indicate if you are the Organization’s Signing Authority:

- If you have signing authority 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 do not signing authority select “**No,**” and complete the signing authority’s fields

Once the signing authority person'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, click on the "Create Account" button.

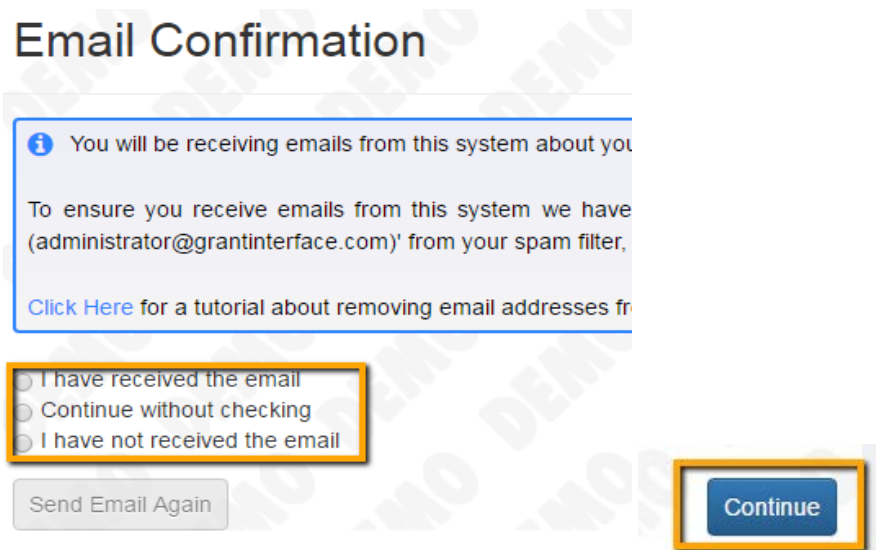


The screenshot shows a web form titled "Password". At the top, a text box contains the password requirements: "Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#%&\*()\_". Below this are two input fields: "Password\*" and "Confirm Password\*". At the bottom left is a "Previous" button, and at the bottom right is a "Create Account" button, which is highlighted with a yellow box and an arrow.

## 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. Your account has now been created in the system, for both present and future applications.



The screenshot shows the "Email Confirmation" page. It features a blue information box with the text: "You will be receiving emails from this system about you. To ensure you receive emails from this system we have (administrator@grantinterface.com)' from your spam filter. Click Here for a tutorial about removing email addresses fr". Below this is a list of radio button options: "I have received the email", "Continue without checking", and "I have not received the email". The first option is selected and highlighted with a yellow box. At the bottom left is a "Send Email Again" button, and at the bottom right is a "Continue" button, which is also highlighted with a yellow box.

## APPLICATION PAGE

Upon accessing the system, you will land on the **Apply Page**. This page will show you any currently open grants opportunities, as well as any relevant deadlines.

You can preview the application 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.

When you click **“Apply”** you will be taken into the **Application form**.

The screenshot shows the 'Apply' page for the Clayoquot Biosphere Trust (CBT). At the top, there is a navigation bar with the CBT logo and links for 'Apply', 'Organization History', and 'Fax to File'. Below the navigation bar is a search bar labeled 'Quick Search'. The main content area is titled '2018 Vital Grants' and includes a sub-header 'Accepting Submissions from 01/15/2018 to 03/05/2018' with an 'Apply' button. The text describes the Vital Grants program, which aims to support meaningful collaboration between organizations, communities, and cultures. It lists the types of grants that can be utilized, such as supporting teams with well-developed timelines and budgets, or supporting the capacity of an existing or expanding project team. It also mentions that during the online application, users will be requested to complete and upload a budget worksheet and letters of support. At the bottom of the page, there are buttons for 'Preview', 'Send to Grant-Hub', and an information icon.

## Application form

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

Next, 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 time.

**Character limits:** Responses that are longer than the set limit will be saved, but an error message will appear informing 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.

**Upload fields:** Only one file per field is accepted. If you attempt to upload a file that is larger than the set limit, you will receive an error message that means the file will not be saved. Fields may also have File Type restrictions. If you attempt to upload a file type in an unaccepted file type you will receive a warning and you will not be able to upload the file. You can delete any uploaded files by clicking the red X next to the file name and a new file can be uploaded.

**Saving your application:** Even though the system is auto-saving there is still a **“Save”** button at the bottom of the form in order to save your application.

- 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.



**Submit the application:** If any required fields were not completed, or there was an error, the system will not allow the form to be submitted. Once the form is submitted successfully, you will be taken to a **confirmation page**. You can then click **“Continue”** to be directed to your dashboard where you can view your submitted request.

**Note that once an application has been submitted you can no longer edit it.**

If you'd like a 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.

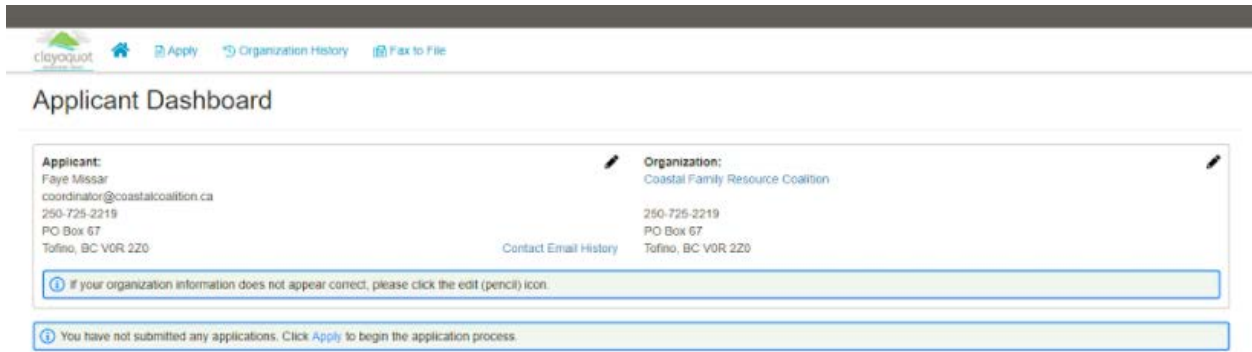
Please note that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending “time out”).

## APPLICANT DASHBOARD

After submitted or saved your application you can return to your **Applicant Dashboard** by clicking on the **“Home”** icon link in the navigation menu.

On your Dashboard you can view requests that have been submitted or you can edit applications that you have saved but have not submitted.

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



## EDITING YOUR PROFILE

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

