Applicant Portal Guide

Welcome! We adopted a new portal in late 2020. This document will help you navigate the process of accessing, registering, and navigating the portal. This document is helpful for new applicants. Grantees, please see the grantee portal guide in the grantee section of the website.

Registration

New Users applies to:

- All new applicants
- Any former applicant that did not have an <u>active</u> award in late 2020.

Unlike our former system which required a singular user record, we now want all individual users that need portal access to register here. You will be linked up to your organization account as a part of the registration process.

If you had a user record in our former portal, please feel free to reach out and we can let you know if you have an existing user record in our new system.

New users will be asked to complete an eligibility quiz upon clicking on the new user button. Please answer the questions accurately to ensure you are eligible to apply.

Returning Users

Returning Users applies to:

- Any applicant returning since registering after November 2020
- Any applicant returning to an in-progress application

Recovering a Password

The login screen features a "forgot password" link.

Helpful tip: <u>All</u> usernames are email addresses. Use your email to recover a password if you are a user in our new system.

Portal Homepage:

Once you are logged in, you will see the following. Everything you need to apply is accessible from this homepage.
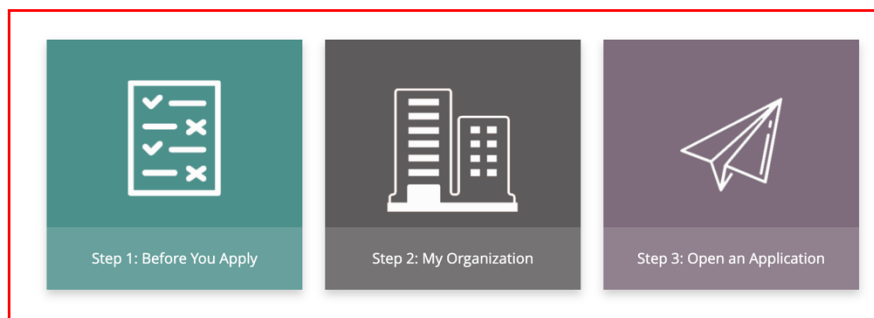
Welcome to the Assisi Foundation's grants portal! If you are starting a new application, please begin with step 1 below. Renewal applicants: your application is provided below with an "application started" status. Grantees must complete all forms within the Grantee Requirements header above. Grantees, you are also responsible for updating your "My Organization" section with current and accurate contact information, particularly Executive Director details and mailing address, for the entirety of your grant's lifecycle.

The list below shows all open or active applications/grants or available renewal applications:

Reference Number	Request Name	Request Record Type	Status
	Community - renewal Test	Renewal Application	Application Started
	Grant Application	Grant Application	Application Started
	Grant Application	Grant Application	Application Started

View All

Please do not click on the "Open an Application" button more than once or you will open multiple applications. In progress applications are listed above.

Step 1: Before You Apply   Step 2: My Organization   Step 3: Open an Application

Step 1: Before You Apply. This section provides tips about the application process.

Step 2: My Organization. Please do not skip this step. In this section we collect very important information about your organization including mailing address and current leadership. <u>We will not accept an application if this section has not been completed.</u>

Step 3: Open an Application. Clicking on this button you will be asked to choose a general or capital application type. Please refer to step 1 if you need guidance. This button <u>opens</u> an application.

IMPORTANT NOTE: Please do not click on the purple "Open" button multiple times. Once you have opened an application by clicking once, your open application will then be accessible from the applications list right above it. Clicking on this button multiple times creates multiple open application records. Refresh your page if you don't see the application in the list.

Contact Taylor Wamble at twamble@assisifoundation.org with questions
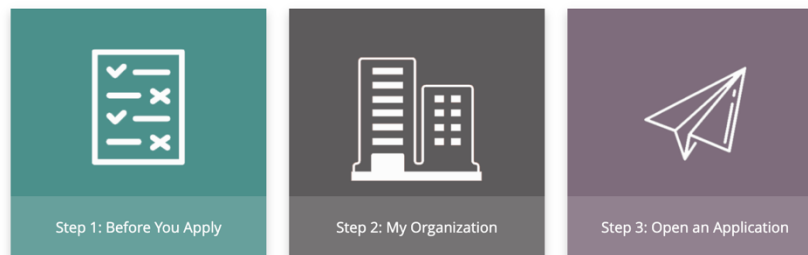
Returning to an open application:

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Step 1: Before You Apply	Step 2: My Organization	Step 3: Open an Application

Open applications will be listed here. Click on the request name to resume working. Please do not click on the purple "Open an Application" button again if you already have an open application.

If you decide you want to change your application type (general or capital) after you have already opened an application, contact us and we can change that for you.

Helpful Tips:

- We strongly recommend typing your responses in a word doc. A form is provided and accessible from the Foundation's website. That document also provides character/word guidelines.
- Save often!
- The system will boot you out after 2 hours of inactivity. Please be aware returning to an application after this period of inactivity may result in lost work if it was not saved.