Hawaiʻi Community Foundation

GRANTS PORTAL

APPLICANT USER GUIDE

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Welcome

Introduction

Welcome to the Hawaii Community Foundation Grants Portal—a central website to submit grant applications and manage grants. The Grants Portal is a partnership of Hawaii Community Foundation, Atherton Family Foundation, Fred Baldwin Memorial Foundation, Cooke Foundation and Victoria S. and Bradley L. Geist Foundation.

Since 1916, it has been our vision to leverage the power of partnership to inspire generosity, advocate for equity, forge connections and invest in community to create a better Hawai'i.

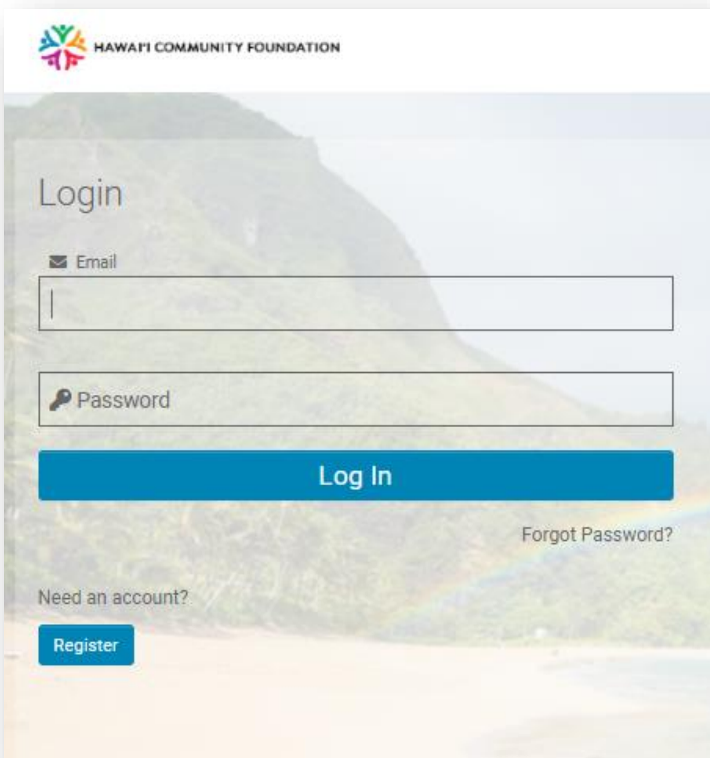
To best support grant applicants, we strive to make the process as easy and clear as possible. This guide will help you complete the application process and maintain your organization's profile.

Having Trouble?

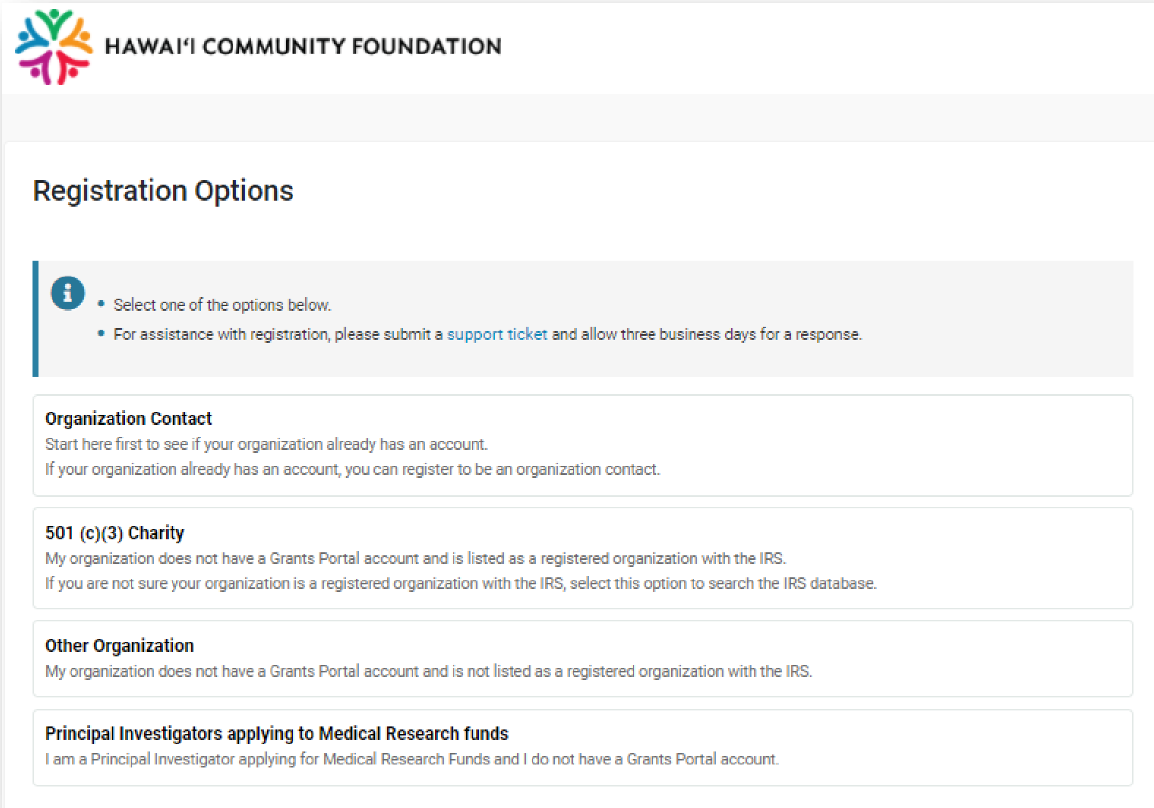
If you need assistance accessing your account or application, please review our FAQs here or submit a support ticket here.

Registration for new Users

1. Access the Grants Portal here.
2. If you are a returning user, proceed to **Login**. If you are a new user click **Register**.



3. Select the type of account you want to create:



a. **Organization Contact**: Start here first to see if your organization already has an account in the system. If your organization already has an account, you can register as an organization contact. Your organization's primary Account Contact will have to activate your account after you submit this request.

Click for 501 (c)(3) Charity Details

b. **501 (c)(3) Charity**: Select this option if your organization does not have an account and is a current, 501(c)(3) organization.

Click for Other Org Details

c. **Other Organization (go to step 6)**: Select this option if your organization does not have an account and is not registered as a 501(c)(3) Charity; non-exempt, religious entities, organizations working with fiscal sponsors, state and city agencies etc.

Click for PI Details

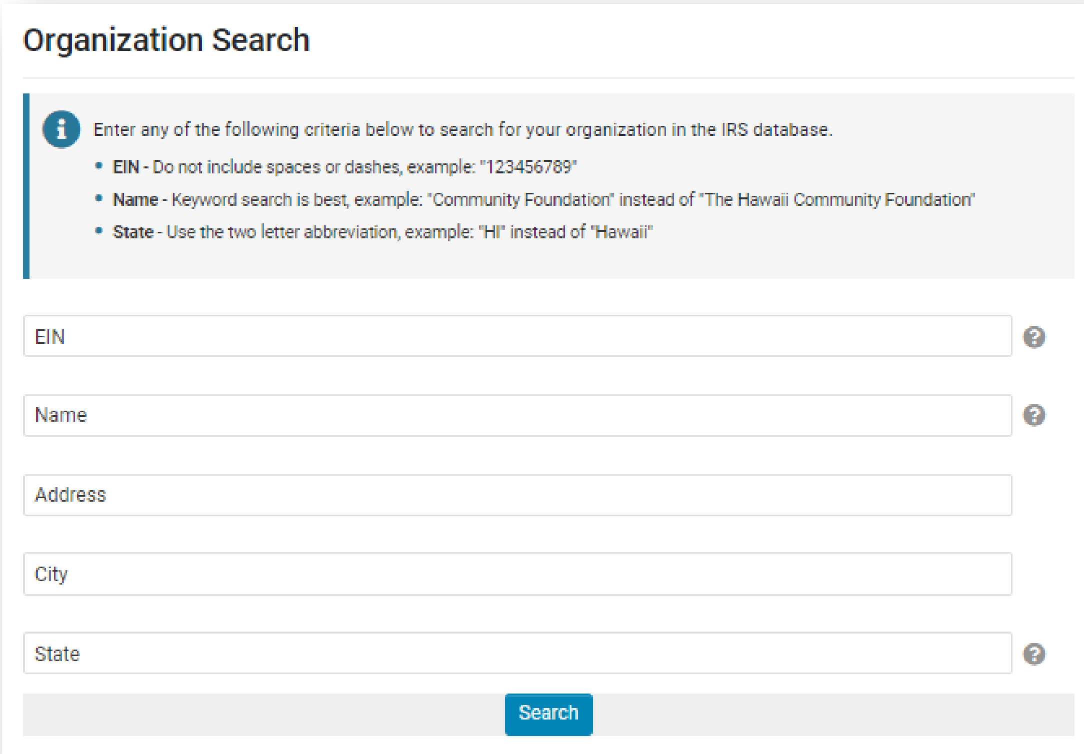
d. **Principal Investigators applying to Medical Research Funds**: Only select this option if you are a Principal Investigator applying to Medication Research Funds.

Organization Contact:

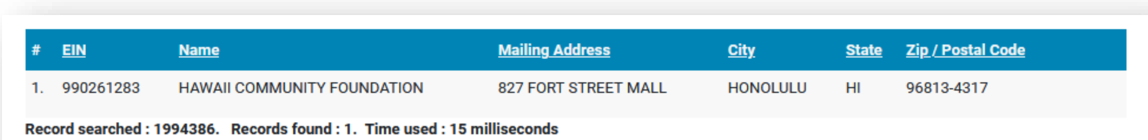
1. If your organization already has an account, you may submit a request to be added as a contact of the organization. Requests are managed by your organization's primary Account Contact.
2. In the *Legal Organization Name* field, search for your organization name by entering a few keywords from your organization name. Do not include Hawaiian diacritical markings. Select your organization from the drop-down list. If you do not find your organization name, then return to Registration Options to select other options.
3. Enter your first name, last name, title and email, then click **Submit.**

4. An email will be sent to your organization’s primary Account Contact to activate your account.
5. Once your account has been activated by the primary Account Contact, you will receive an email with a link to set your password.

501(c)(3) Charity



1. Enter any of the following criteria below to search for your organization name:
    - Employer identification number (EIN) – do not include spaces or dashes
    - Organization name – for best results, enter a few keywords in your name; do not include Hawaiian diacritical markings.
    - Address
    - City
    - State using the two-letter abbreviation, i.e. “HI”
2. Click **Search**. The system will run a search and return any matches found within the IRS database.
3. From the returned results, select your organization to complete the registration process.

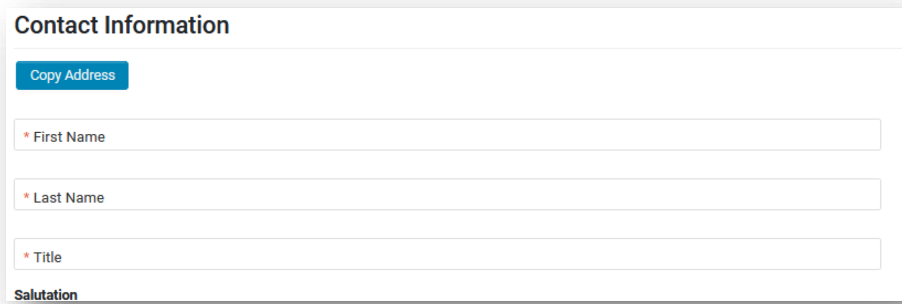


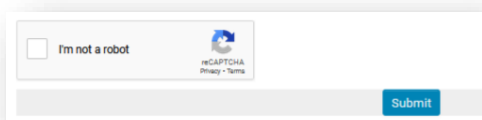
#	EIN	Name	Mailing Address	City	State	Zip / Postal Code
1.	990261283	HAWAII COMMUNITY FOUNDATION	827 FORT STREET MALL	HONOLULU	HI	96813-4317

Record searched : 1994386. Records found : 1. Time used : 15 milliseconds

4. The *Organization Information* will be auto populated from the IRS database and may not be updated.

5. Enter your *Contact Information,* complete the CAPTCHA and click **Submit**.



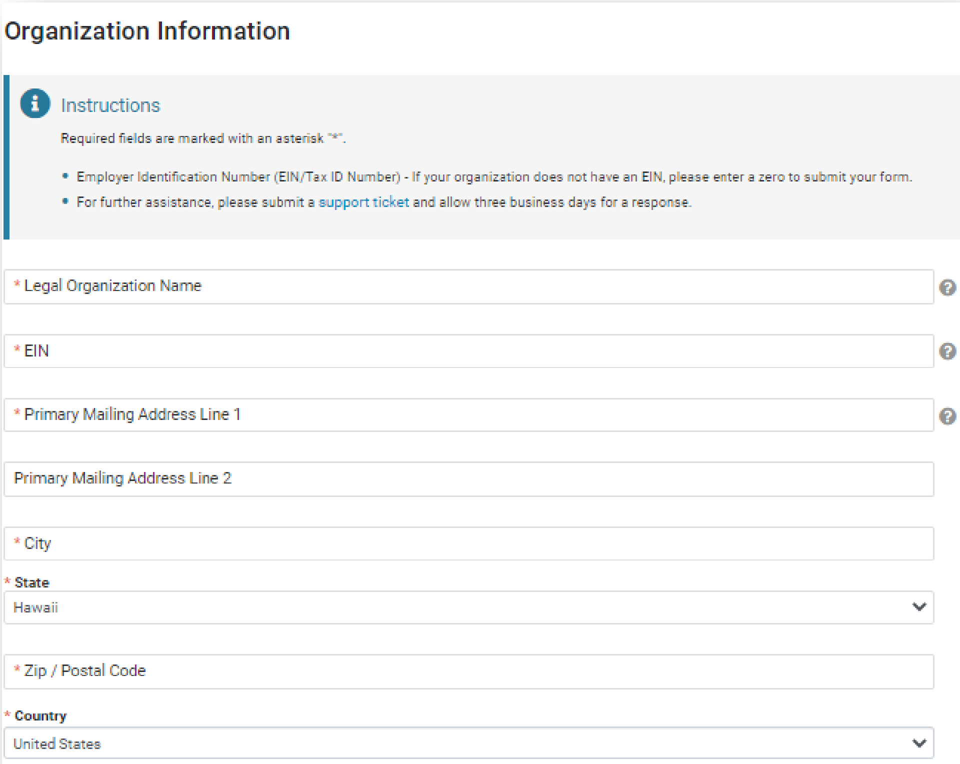


6. An email will be sent to your registered email address with a link to set your password. Upon logging into the system, please take a moment to review your organization's profile and your personal contact record. ***If your organization already exists in the system, please return to Registration Options and complete the "Organization Contact" link to have your account activated by the current primary Account Contact.*

Other Organization:

For all otherwise exempt or non-Charity organizations, religious entities, state and city agencies, public schools.

1. Enter your *Organization Information* and *Contact Information,* submit the CAPTCHA and then click **Submit.**

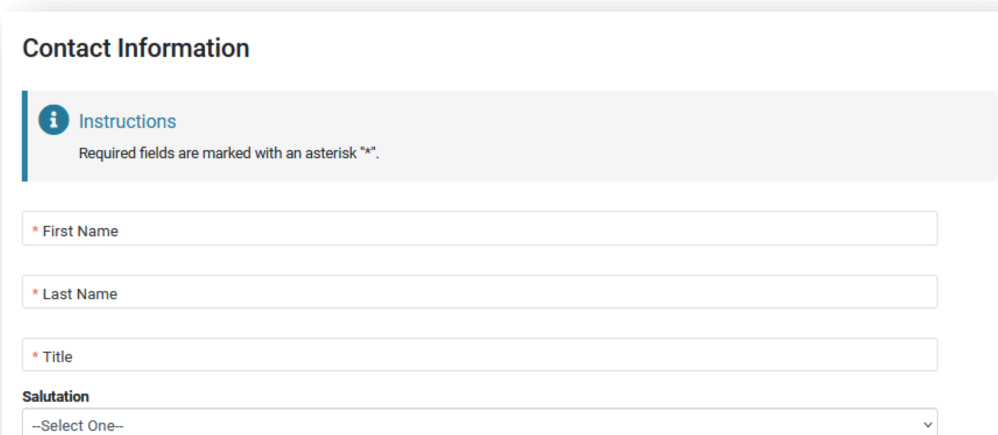


2. An email will be sent to the registered email address with a link to set your password.

Principal Investigators applying to Medical Research Funds

If you are a PI applying to this program, please use the [Medical Research Applicant User Guide](#) as it contains information specific to this program.

1. Enter your contact information, complete the CAPTCHA and then click **Submit**.



2. An email will be sent to the registered email address with a link to set your password. Upon logging into the system, please take a moment to review your account profile.

Login & Organization Account Maintenance

Login Process

After registering your account, you can log in at any time using the email address and password that you used when registering. If you are a new registrant, or someone added you to an organization profile, you will receive an automated email with a link to set your password.

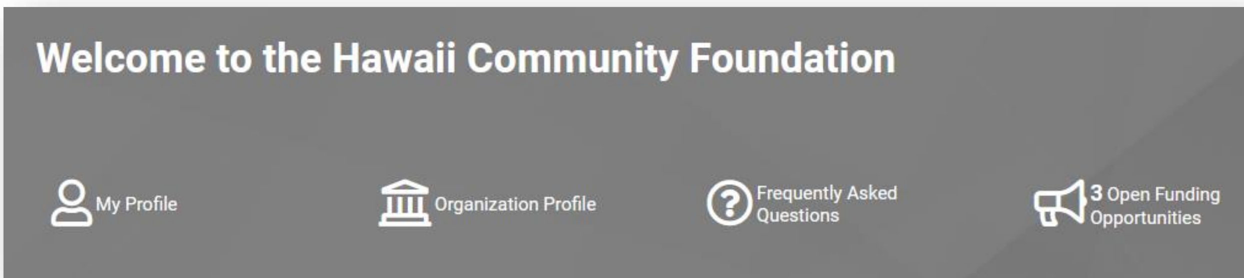
Password Reset

If you do not remember your password, please click **Forgot Password** and follow the instructions. A link to reset your password will be emailed to you.

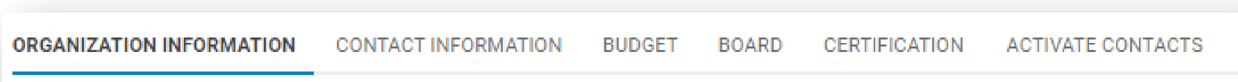
Completing Organization Profile Setup/Annual Recertification

Upon initial account setup, the primary Account Contact will be asked to complete the setup of your organization profile. A recertification of the profile must be completed annually. To complete setup or recertification, log in to the system and follow these steps:

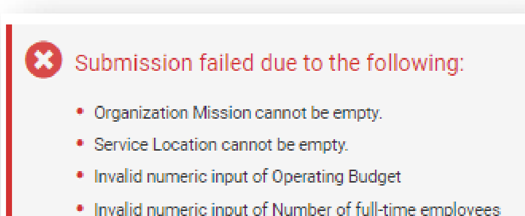
1. Click "Organization Profile" in the ribbon



2. Complete all required fields marked with an asterisk under each of these tabs:

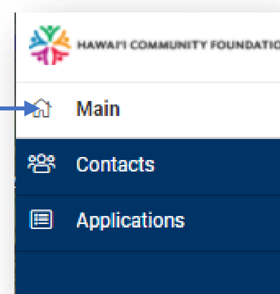


3. Click "Submit Profile" to submit the organization profile as complete.
4. IF any fields are missing, you will receive an error message at the top of the page. Click each hyperlinked error line to be taken to the specific field.



Key items to note in the Organization profile:

- **Organization Information tab**:
    - Legal Organization Name: If this needs to be changed, please submit a support ticket.
    - Organization Name for Publication: In many cases, this will be the same as your legal organization name. The contents of this field will be used in publications.
    - IRS Letter upload: This is not a required field. Some Funding Opportunity Guideline documents will note that this letter is required for that specific funding opportunity if you apply to it. Please post it here.
- **Contact Information**
    - If your Chief Staff or Volunteer is not included in the dropdown, please have them register in the Grants Portal using the Organization Contact registration option. You can activate their account in the "Activate Contacts" tab
    - "Local Hawaii Address for National Organizations": If you are a local organization without a national affiliation, please select "No" for both questions. If you do not select "No" you may receive an error upon submission.
- **Budget**
    - Please follow the instructions noted in the tooltip to upload documents.
    - These documents are specific to your organization. All program documents will be posted to individual applications.
- **Board**
    - Make sure your most up to date board list is posted. If you are an organization that is noted in the tooltip and does not have a board, please post a document with a note stating that you do not have a board.
- **Certification**
    - This certification must be completed annually. You can update the information at any time, but the annual recertification lets HCF staff know that you are confirming the correctness of the information posted as it will be used in the application review process.
- **Activate Contacts**: To deactivate a contact, please submit a support ticket. To activate contacts, follow the instructions below.
- **Organization Profile Left-hand Navigation Panel**



    - In the "Contacts" tab you can review all users that have access to your organization. To deactivate users, please submit a support ticket.
    - In the "Applications" tab you can review all applications that have been submitted through your organization. If they were submitted through former grant portals and you need a copy of any reports, applications or award letters, please submit a support ticket with the grant #, what information you need, and any details that would assist the team in fulfilling your request.

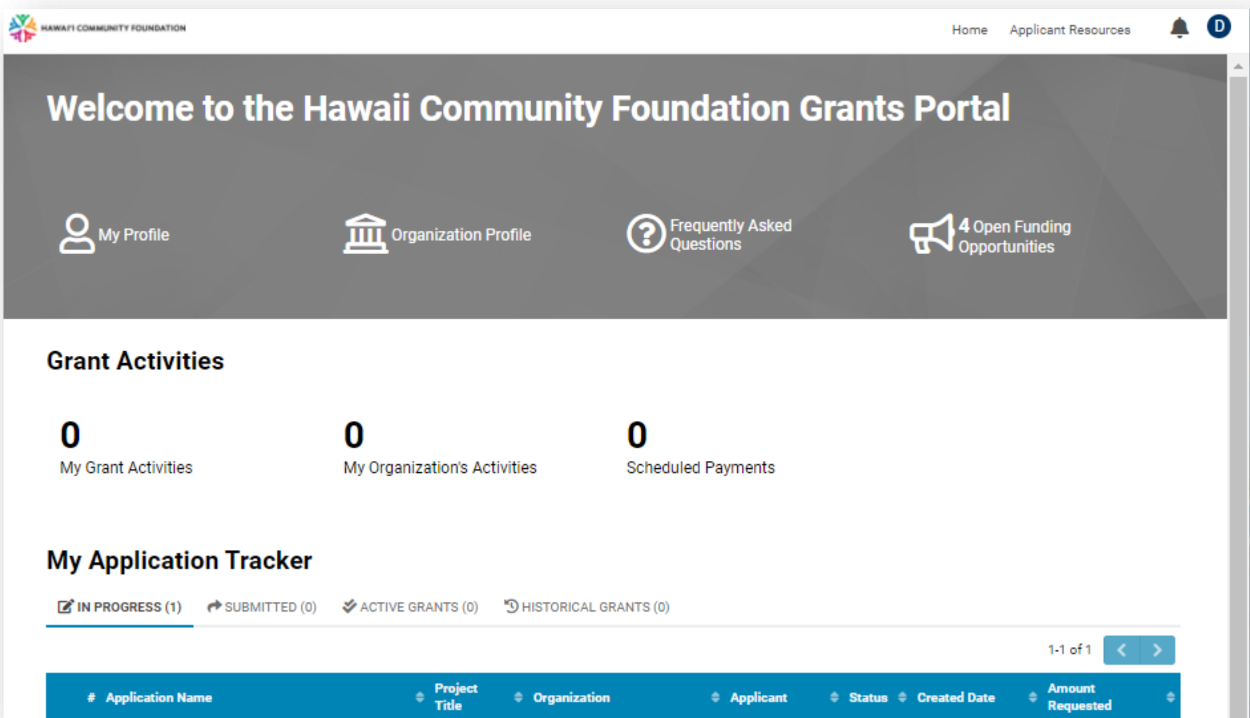
Activate Account Contact Requests

- All organizations will need to identify a primary **Account Contact** for their organization under the "Contact Information" tab. This contact will be responsible for validating new organization contacts.
- When an individual registers as a contact of your organization, the organization's primary Account Contact will be notified of a pending ***New User Validation*** via email. To complete activation the primary Account Contact must follow these steps:

1. Log in to the Grants Portal.
2. Click "Organization Profile"
3. Click the "Activate Contacts" tab
4. Click the "Open" button next to the requesting user's name
5. Click "Valid Profile" if the profile belongs to an employee or volunteer. Select "Invalid Profile" if they are not associated with your organization.
6. If the profile is Valid, your next step is to update or confirm the information submitted in the request. Click "Submit Profile" when complete.
7. Click the X in the top right corner of the pop-up window to return to the Organization Profile.

Applicant Portal

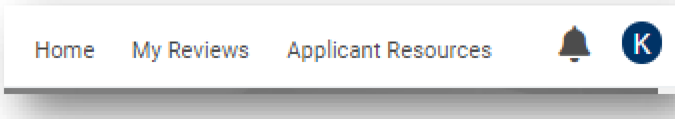
This is your applicant portal, where you can access and update your individual and organization profiles, review open funding opportunities, submit applications and final reports, and track activities needed for current applications.



Top Right Navigation

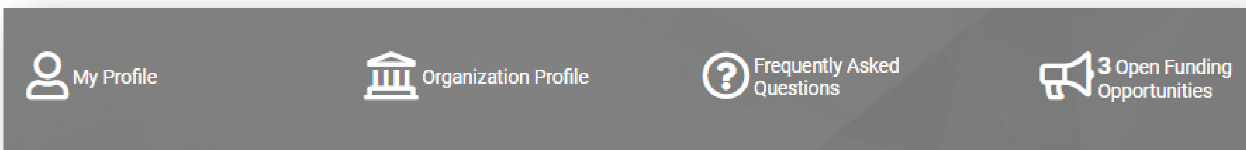
- **Home**: Click here to return to the Grants Portal landing page.
- **My Reviews**: You will only see this link if you are on a review committee.
- **Applicant Resources**: Click here to access additional templates and downloads to use for final reports, budget submissions, etc. Please reference the Funding Opportunity guidelines for the list of documents required for your application or grant.
- **Notifications (Bell Icon):** Click here to see notifications related to your account.

- **Account Settings (First Initial Icon):** Click here to access alternate links to your Profile and your Organization's Profile, to change your password, and to log out.



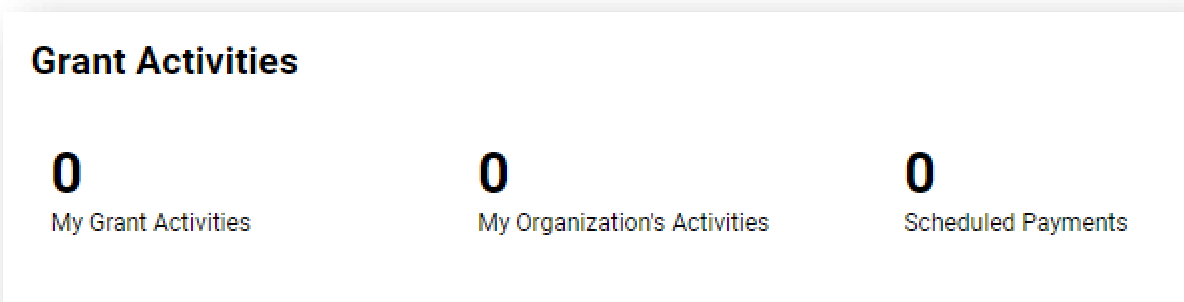
Shortcuts

- **My Profile**: View and edit your personal contact information.
- **Organization Profile:** View and edit your organization's profile information. Organizations are required to confirm their organization's profile is up to date at least once a year.
- **FAQs:** Find answers to our most frequently asked questions.
- **Open Funding Opportunities:** View all of the available funding opportunities.



Grant Activities Portal Tiles

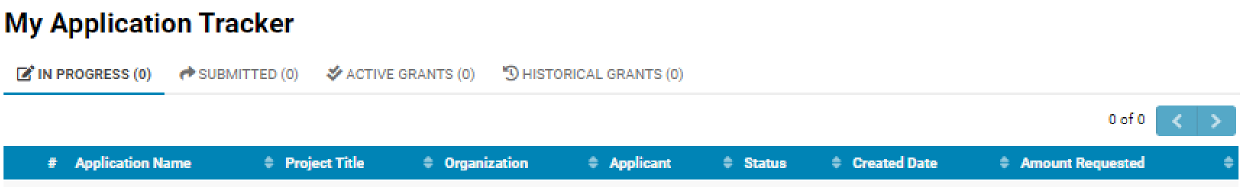
- **Grant Activities:** View a list of scheduled reports or conditions for payment release related to your grants.
- **My Organization's Action Items:** View a list of scheduled reports and conditions for all active grants under your organization. However, you will only be able to submit Action Items that are assigned to your account.
- **Scheduled Payments:** View a list of scheduled payments for your organization.



My Application Tracker

- The applications listed here are the applications that you have submitted as the Applicant Contact. It does not list applications submitted by other contact accounts in your organization. To view the complete list of applications for your organization, go to your **Organization Profile** and click **Applications** link on the left side.

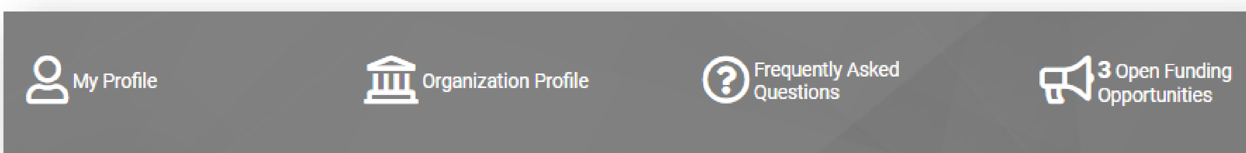
- **In Progress**: Applications you have started, but not submitted. This list may also include applications you have previously submitted and have been returned to you with a request for additional information.
- **Submitted**: Applications you have submitted. Once an application has been submitted, you will no longer be able to make changes to the application.
- **Active Grants**: Applications that have been approved and awarded a grant. Please note, as of 1/18/2022, as HCF continues to make its transition to the new Grants Portal, you may not see your current active grants with HCF. These will be imported once we complete the transition later in 2022. If you have any questions on current, active grants, please contact the staff on your original Grant Award letter.
- **Historical Grants**: Grants that have been closed and declined applications.



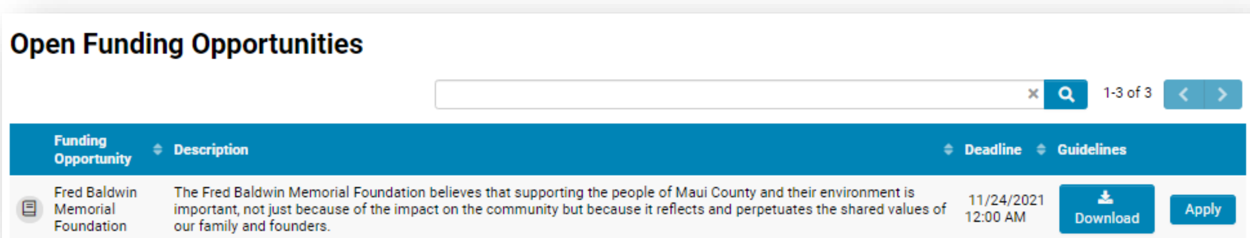
Application Tips and Revisions

Submitting an Application

1. Review your Organization Profile to make sure all required fields have been completed. If the profile is incomplete or has not been recertified in more than a year, you will be unable to submit your application.
2. Click "Open Funding Opportunities".

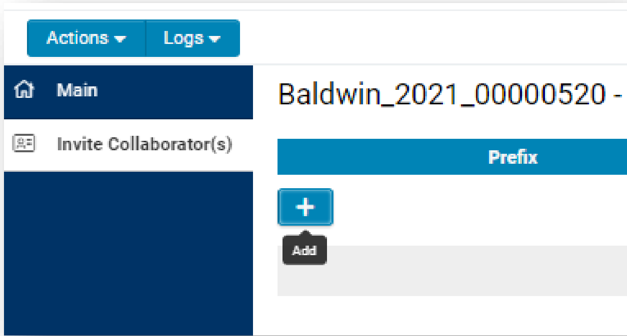


3. Click the "Download" button to review the grant application requirements.
4. Click "Apply" to start your application.

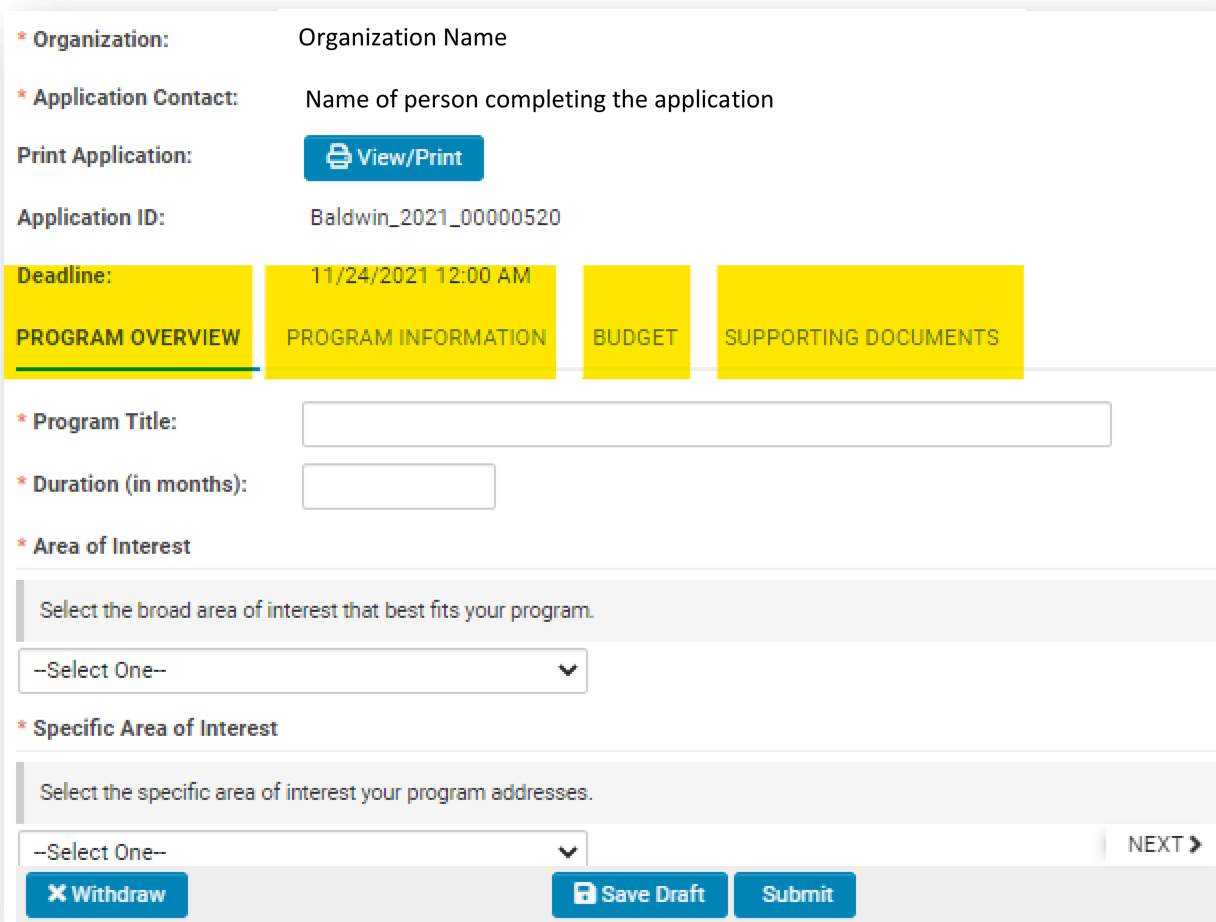


5. Review the notes and instructions and click "Begin Application." *At any point in the submission process, you may click "Save Draft" to save a copy and return later.*

6. If you are collaborating with a colleague (internal or external) to submit this application, select "Invite Collaborator(s)" from the left navigation pane. If not, please continue to step 10.



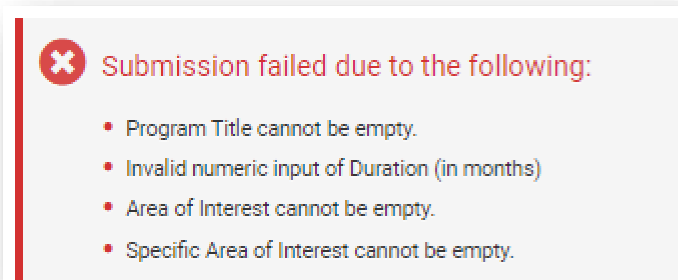
7. Click the "+" button to add collaborator information. Click "Invite" to send an email notification to the collaborator with instructions on how to create their account. If they are not already in the system, their account will need to be activated after creation.
8. Return to the main application by clicking "Main" in the left navigation.
9. Complete all required fields in all of the application tabs. Note that these tabs may change depending on the application that you are submitting.



- **Program Overview:** Enter data about your organization.

- **Program Information:** Enter information about the program for which you are applying.
- **Budget**: Enter your total program budget and the amount that you are requesting. You will also be required to submit a budget form. If you need a template, please see the "Applicant Resources" link in the top right-hand corner.
- **Supporting Documents:** Upload any documents that are required in the application. You will also complete a certification prior to submission on this tab.

10. You can toggle between tabs by clicking them, or by selecting the "Next" and "Back" buttons at the bottom of the form.
11. After completing all required fields, click "Submit" at the bottom.
12. If any required fields have not been completed, you will receive an error notification. You can click any error in the notification box to be directed to the specific field to complete.

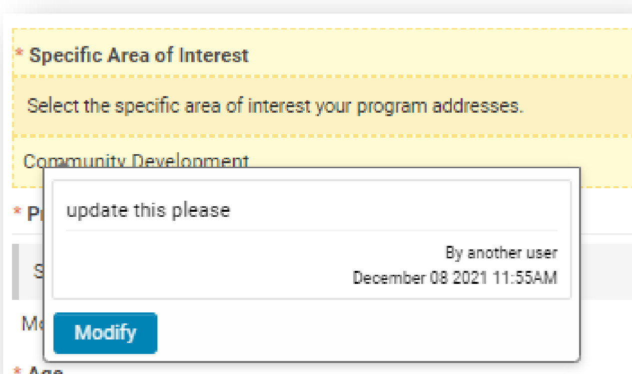


13. Upon completion, you will receive an email confirming submission. If any further follow up is needed, you will receive emails from the Grants Portal. Please mark any emails from donotreply@hawaiicf.com as safe so that they do not go into your spam box. You can access all submitted applications in the My Applications Tracker section of your home page.

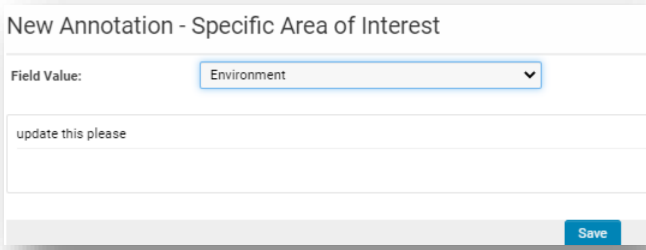
Completing Revision Requests

At times, upon review, HCF staff may send an application back to you requesting more information, updated attachments, etc. If this is the case, you will receive an email with a subject line that states "Action Required: Review your application."

1. Log in to the system
2. Go to My Applications at the bottom of the page, click "In Progress". The grant application in question will have a status of "Revisions Requested". Click to enter the revision stage.
3. The application sections requiring revision will be highlighted in yellow. You can also access them under the "Annotations" option in the left application navigation column.



4. Click the highlighted section and a popup box will appear showing comments from staff. Click the “Modify” button to open the window to make edits.
5. Depending on the type of field that you are modifying, you will see a dropdown menu selection, check boxes, a text field, or an upload option. Complete the change request and click “Save” to save the modifications and close the popup box.



6. After all annotations are completed, click the “Submit” button at the bottom of the page to resubmit your application with all modifications.

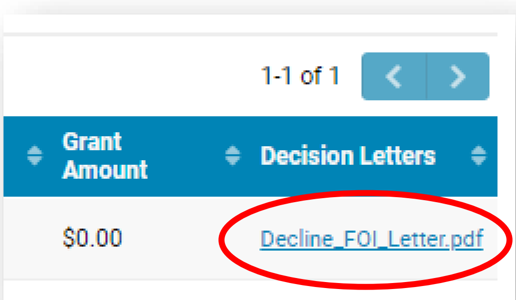
Save a Copy of your Application

1. Find your application under the Submitted, Active, or Historical Grants tab in the My Applications Tracker. Click the application you want to save a copy of.
2. Click the “View/Print” button.

3. You will see a popup of your completed application and listed attachments that can be electronically saved or printed for your records.

Decision Notifications

After your application has been reviewed, the Chief Staff/Volunteer and primary Account Contact of your organization will receive a decision notification, a letter informing you the application has been deferred, awarded, or denied. For copies of these letters go to “Active Grants” for accepted grants and “Historical Grants” for denied applications. Click the linked document under the Decision Letters column.



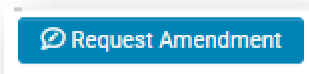
Requesting Changes to Active Grants

The following features are available for you to request changes to your active grants. Please note, as of 1/18/2022, as HCF continues to make its transition to the new Grants Portal, you may not see your current active grants with HCF. These will be imported once we complete the transition later in 2022. If you need to request changes to any active grants that do not currently appear in your Applicant Portal, please contact the staff on your original Grant Award Letter.

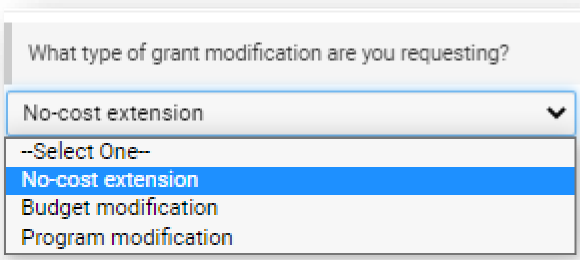
Requesting a No-Cost Extension

To submit a no-cost extension, complete the following steps:

1. Go to the My Applications Tracker at the bottom of your portal. Click the “Active Grants” tab to find your grant.
2. Click the “Request Amendment” button.



3. Click “Save Draft” to begin the amendment process.
4. Select the type of amendment that you are requesting.

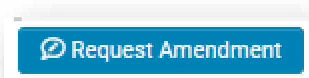


5. Enter the proposed end date.
6. Enter information about why you are requesting the extension in the “Extension Request” section of the form.
7. Upload any supporting documents if needed.
8. Click “Submit” to submit your request. Staff will review the request in the system and you will receive a system notification with the modification approval or denial.

Requesting a Budget Modification

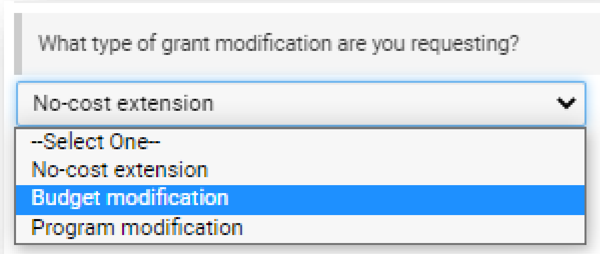
To submit a budget modification for your program funding, complete the following steps:

1. Go to the My Applications Tracker at the bottom of your portal. Click the “Active Grants” tab to find your grant.
2. Click the “Request Amendment” button.



3. Click “Save Draft” to begin the amendment process.

4. Select the type of amendment you are requesting.

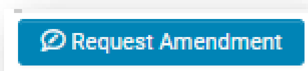


5. Tell us why you are requesting a budget modification in the text box.
6. Upload the updated budget.
7. Upload any other supporting documents if needed.
8. Click “Submit” to submit your request.
9. Staff will review the request in the system and you will receive a system notification with the modification approval or denial.

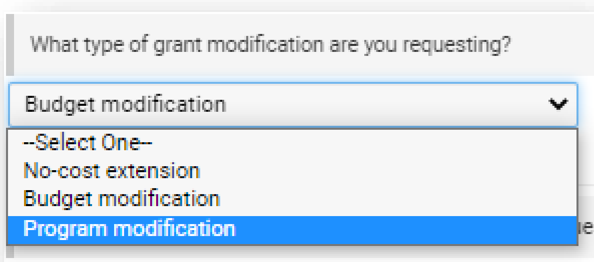
Requesting a Program Modification

To submit a program modification for your program, complete the following steps:

1. Go to the My Applications Tracker at the bottom of your portal. Click the “Active Grants” tab to find your grant.
2. Click the “Request Amendment” button.



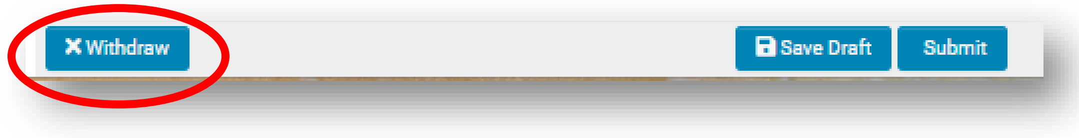
3. Click “Save Draft” to begin the amendment process.
4. Select the type of amendment you are requesting.



5. Provide a summary of the program modifications you are requesting in the text box.
6. Upload an updated budget if needed.
7. Upload any other supporting documents if needed.
8. Click “Submit” to submit your request.
9. Staff will review the request and you will receive an email with the modification approval or denial.

Withdrawing an application

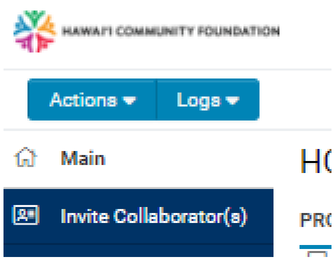
At the *In Progress* or *Submitted* stages of the application process, you can Withdraw from the application process by clicking the **Withdraw** button at the bottom left of the application screen.



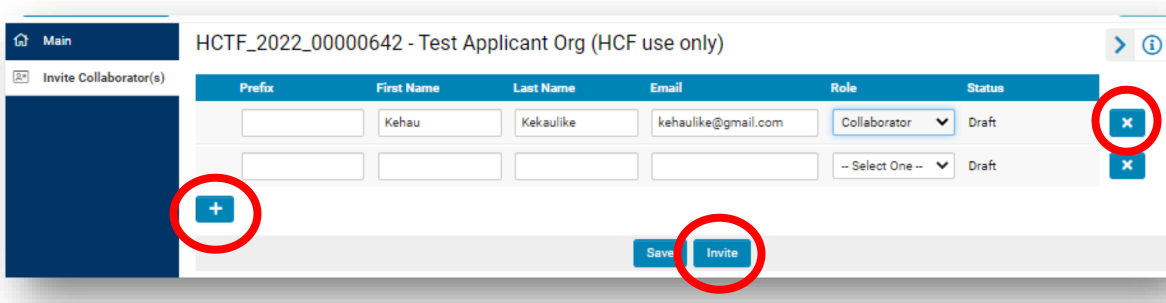
Inviting a Collaborator

Note: you, the Application Contact, will be able to submit the application, but you can invite others to collaborate with you on an application by following these steps.

1. Click the **Invite Collaborator(s)** link on the left hand panel of the application screen.

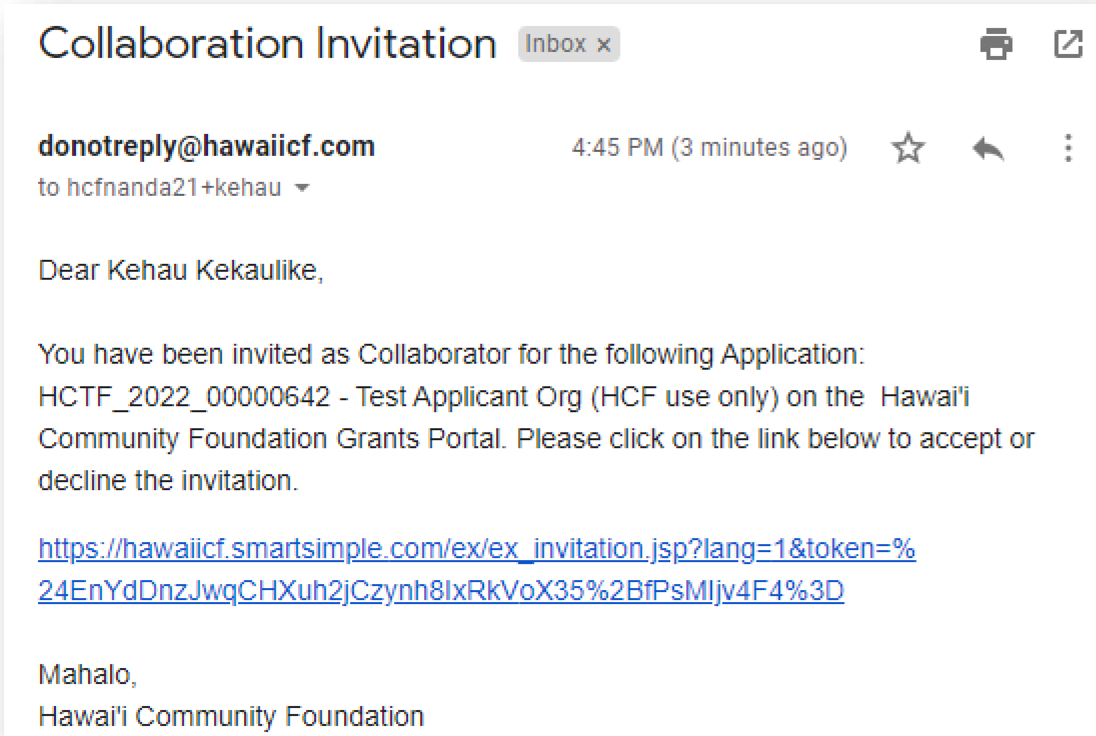


2. Click the "**+**" button and add a line for each contact you wish to add. Enter in the required information and click **Invite** to send the invitations.



- **Save** will hold the information in this form but not send collaboration invitations.
- The *Status* column will show you if the invitation has been sent or not. *Draft* means it has not been sent, *Invited* means they have been sent an invitation via email, *Declined* means they denied the invitation.
- To **remove** a collaborator from the application at any point, hit the "**X**" to the right of their information.

3. After the invitation is sent, the collaborator will receive the following email:



Collaboration Invitation Inbox ×

donotreply@hawaiicf.com 4:45 PM (3 minutes ago)

to hcfnanda21+kehau

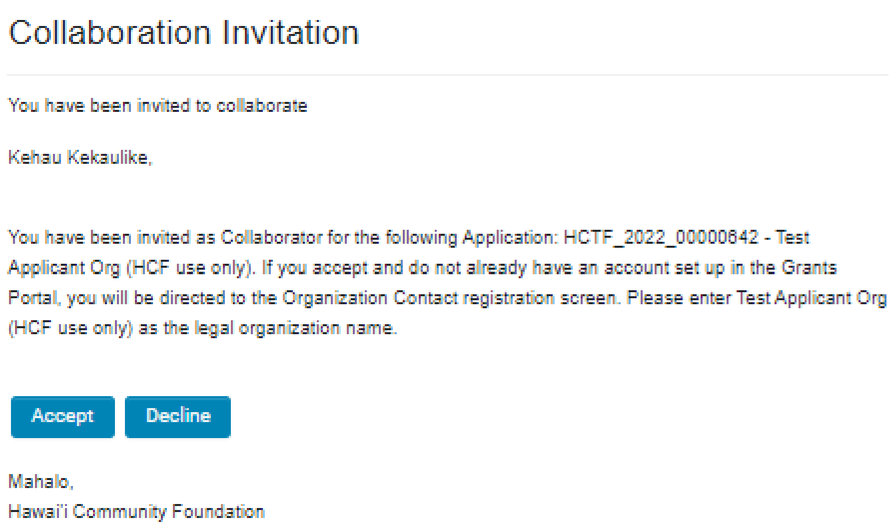
Dear Kehau Kekaulike,

You have been invited as Collaborator for the following Application: HCTF_2022_00000642 - Test Applicant Org (HCF use only) on the Hawai'i Community Foundation Grants Portal. Please click on the link below to accept or decline the invitation.

https://hawaiicf.smartsimple.com/ex/ex_invitation.jsp?lang=1&token=%24EnYdDnzJwqCHXuh2jCzynh8lxRkVoX35%2BfPsMljv4F4%3D

Mahalo,
Hawai'i Community Foundation

4. When they click the provided invitation link, they will be directed to a page where they can accept or decline the collaboration opportunity:



Collaboration Invitation

You have been invited to collaborate

Kehau Kekaulike,

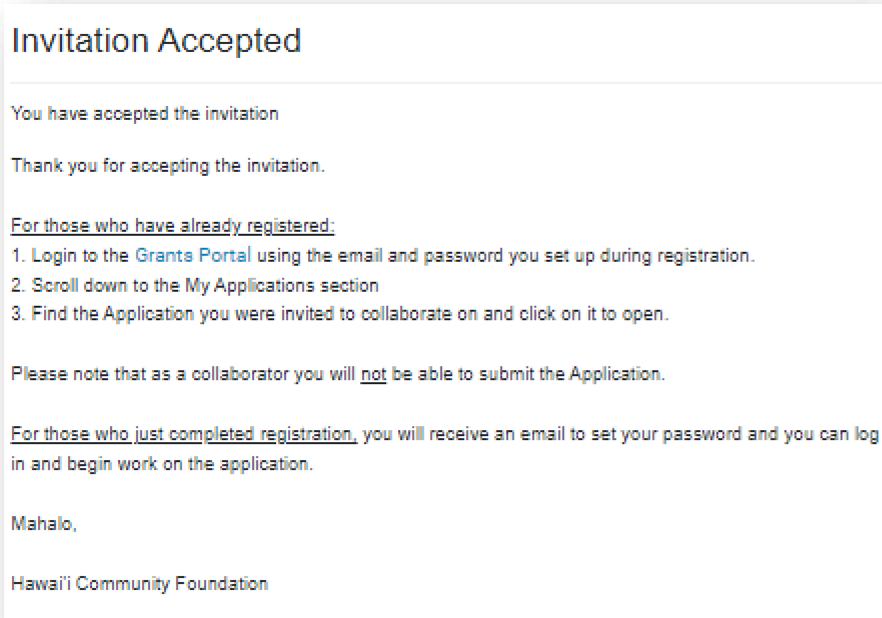
You have been invited as Collaborator for the following Application: HCTF_2022_00000642 - Test Applicant Org (HCF use only). If you accept and do not already have an account set up in the Grants Portal, you will be directed to the Organization Contact registration screen. Please enter Test Applicant Org (HCF use only) as the legal organization name.

Accept Decline

Mahalo,
Hawai'i Community Foundation

5. If **Decline** is selected, they will be redirected to a page that notifies them that the decline was successful, and an email will be sent to the person who invited them to collaborate.
6. If the collaborator selects **Accept**, one of two things will happen.

a. **Accept & they already have an account in the Grants Portal**: They will be redirected to this description page:



Invitation Accepted

You have accepted the invitation

Thank you for accepting the invitation.

For those who have already registered:
1. Login to the Grants Portal using the email and password you set up during registration.
2. Scroll down to the My Applications section
3. Find the Application you were invited to collaborate on and click on it to open.

Please note that as a collaborator you will not be able to submit the Application.

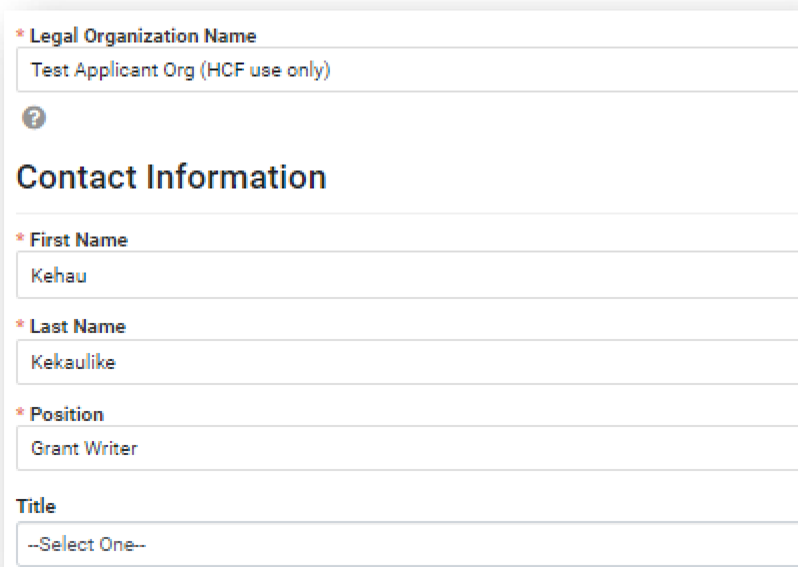
For those who just completed registration, you will receive an email to set your password and you can log in and begin work on the application.

Mahalo,

Hawai'i Community Foundation

b. **Accept** and they do not have an account:

i. The accept button redirects to the Organization Contact registration page. Have them fill this information out using **your Organization name** in the "Legal Organization Name" field



* Legal Organization Name

Test Applicant Org (HCF use only)

Contact Information

* First Name

Kehau

* Last Name

Kekaulike

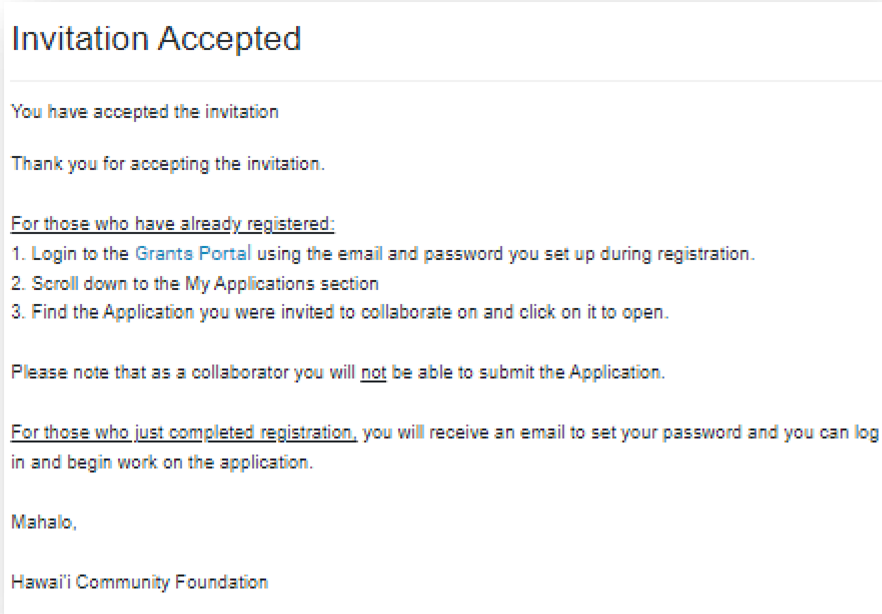
* Position

Grant Writer

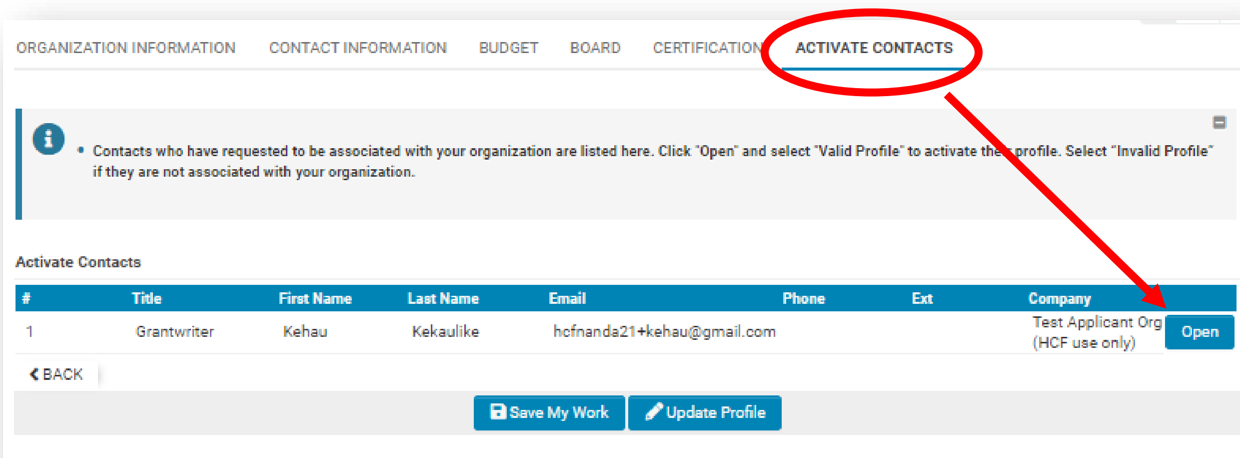
Title

--Select One--

They will be redirected to this screen:



ii. After all required information is entered, your Account Holder (noted in the Org Profile) will be asked to activate their account under your Org Profile.



iii. After the collaborator is activated, they will receive an email with a password reset link. Once they log in, they can access the application in the "In Progress" section of the My Application Tracker section of the home screen.