

Hawai'i  
Community  
Foundation

Grants Portal

# Applicant User Guide



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## Welcome

Welcome to the Hawaii Community Foundation Grants Portal. This is a central website that you will use to submit grant applications and reports, as well as to track and manage your organization's 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.

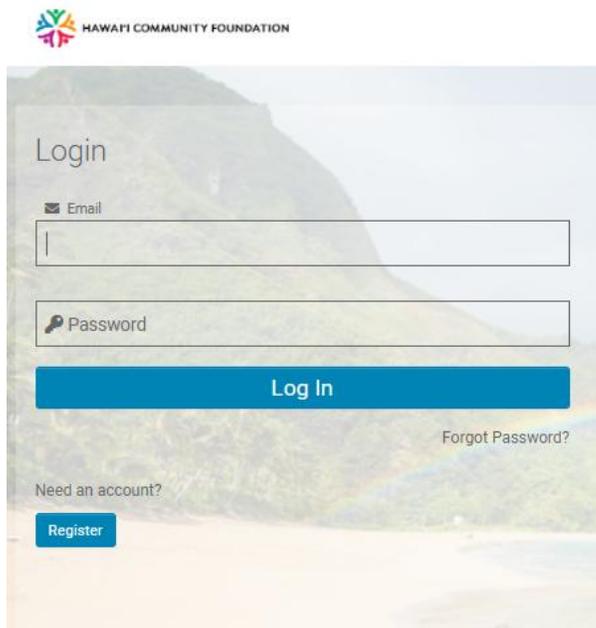
Since 1916, it has been our vision to leverage the power of partnership to inspire generosity, advocate for equity, forge connections and invest in community to create a better Hawai'i. To best support grant applicants, we strive to make the process as easy and clear as possible. This guide will help 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 as there should be answers to many of your questions.

## Registration for new Users

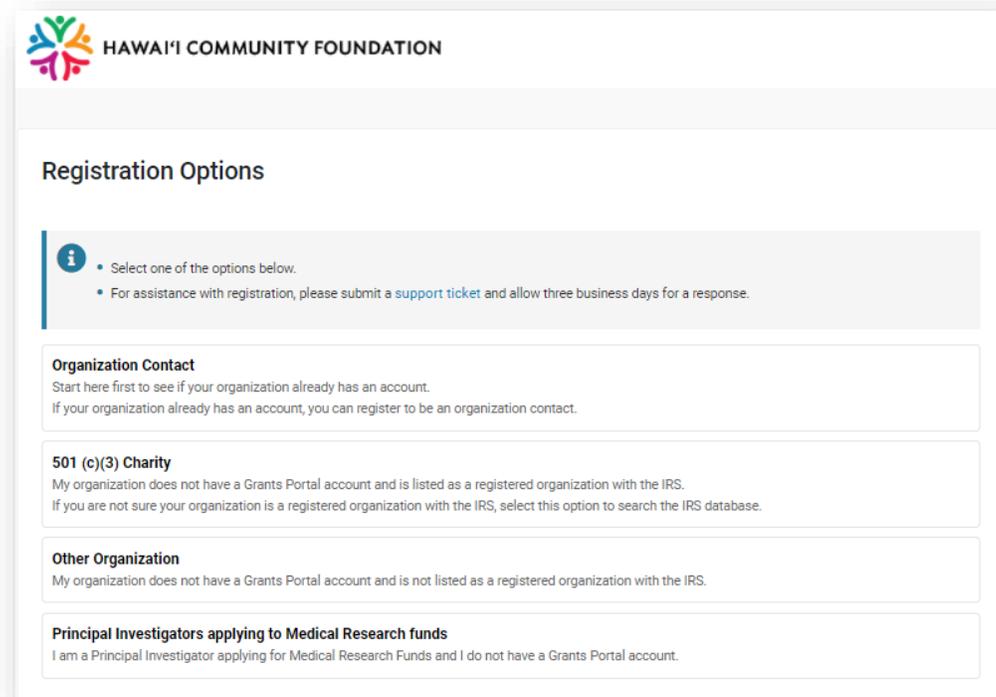
1. Access the Grants Portal [here](#).



The screenshot shows the login and registration interface for the Hawaii Community Foundation Grants Portal. At the top left is the logo for the Hawaii Community Foundation, which consists of a colorful circular emblem with the text 'HAWAII COMMUNITY FOUNDATION' to its right. Below the logo is a 'Login' section with two input fields: 'Email' and 'Password'. The 'Email' field has a small envelope icon to its left, and the 'Password' field has a key icon. Below these fields is a blue 'Log In' button. To the right of the 'Log In' button is a link that says 'Forgot Password?'. Below the login section is a link that says 'Need an account?' with a blue 'Register' button below it. The background of the page is a scenic view of a tropical beach with a mountain in the distance.

2. If you are a new user, click **Register**.
3. Note: if you already have an account associated with your email address, our system will tell you this and prevent you from registering again. In this case, please click "forgot password." You will receive an email to reset your password. Please also check your spam folder (if you do not receive the email, please submit a [support ticket](#)).
4. To Register a new account, first do a check that your organization is not already in our system (click: Organization Contact). If your organization has already been registered, this will allow you to create an account under your organization. See below for the process to add a new contact to your organization's account.

5. If your organization does not already have an account, select the type of account you want to create. There are multiple options and your choice depends on the type of organization you are registering:



- Organization Contact:** Start here 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.
- 501 (c)(3) Charity:** Select this option if your organization does not have an account and is a current, 501(c)(3) organization.
- 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.
- Principal Investigators applying to Medical Research Funds:** Only select this option if you are a Principal Investigator applying to Medication Research Funds.

Click for 501 (c)(3)  
Charity Details

Click for Other Org  
Details

Click for PI Details

### 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. If your primary Account Contact has not been indicated in the Org Profile, please submit a [support ticket](#).
5. Once your account has been activated by the primary Account Contact, you will receive an email in your inbox or junk folder from [donotreply@hawaiicommunityfoundation.org](mailto:donotreply@hawaiicommunityfoundation.org) with a link to set your password within ten minutes.
6. If you know that your organization’s Account Contact is not accessible (maybe a CEO or someone previously employed at your organization), or if the Account Contact does not receive the email to activate your account please submit a [support ticket](#).

### 501(c)(3) Charity

1. Enter any, not all, of the following criteria 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 as the system will not recognize these and may not be able to find your organization.
  - 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. Note, the information may not be updated and you will need to do this once you have created your account.

**Organization Information** Search IRS Database

**Instructions**  
Required fields are marked with an asterisk "\*\*".

\* **Name**  
HAWAII COMMUNITY FOUNDATION

\* **Mailing Address**  
827 FORT STREET MALL

Address 2

\* **City**  
HONOLULU

\* **Country**  
United States

\* **State**  
Hawaii

\* **Zip / Postal Code**  
96813-4317

\* **EIN**  
990261283

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

**Contact Information**

Copy Address

\* **First Name**

\* **Last Name**

\* **Title**

**Salutation**

I'm not a robot

 reCAPTCHA  
Privacy - Terms

Submit

### Other Organization

This category is 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**. Note: this type of organization may not have an EIN number. If it does not have one, please enter 000000000 (9 zeros). This will allow you to move forward with registration.

### Organization Information

**Instructions**  
Required fields are marked with an asterisk "\*".

- Employer Identification Number (EIN/Tax ID Number) - If your organization does not have an EIN, please enter a zero to submit your form.
- For further assistance, please submit a [support ticket](#) and allow three business days for a response.

\* Legal Organization Name ?

\* EIN ?

\* Primary Mailing Address Line 1 ?

Primary Mailing Address Line 2

\* City

\* State  
Hawaii ▼

\* Zip / Postal Code

\* Country  
United States ▼

2. You will receive an email in your inbox or junk folder from [donotreply@hawaiicommunityfoundation.org](mailto:donotreply@hawaiicommunityfoundation.org) with a link to reset your password within ten minutes. If you do not receive it, please submit a [support ticket](#).
3. Upon logging into the system, please take a moment to review your account profile and make sure all information is correct.

## 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 from [donotreply@hawaiicommunityfoundation.org](mailto:donotreply@hawaiicommunityfoundation.org) and should arrive in your inbox or junk folder within ten minutes. Note that this link expires 12 hours after it is sent.

## No Password Reset Email Received

If you do not receive a password reset email in your inbox within ten minutes of completing the request, please check your junk folder. If the email is in your junk folder, please mark it as 'not junk'.

If the email has not been received in your inbox or junk folder, please submit a [support ticket](#) requesting a temporary password and noting the steps you have taken.

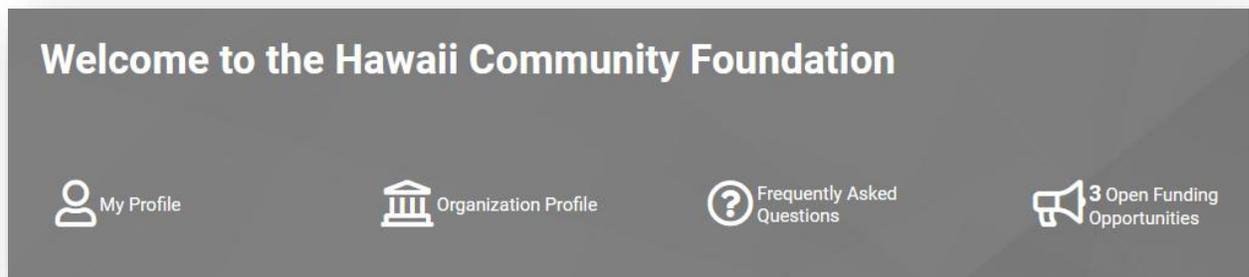
While you wait for a response, please communicate with your technology department that the domain @hawaiiicf.com needs to be marked as a safe sender in your email exchange. If you do not have a technology department, you can whitelist the domain yourself. There are many useful tools on the internet to help you do this. Simply search your email exchange (i.e. gmail or Office 365) + whitelist domain. For Office 365, [this](#) is a good resource.

## Completing Organization Profile Setup/Recertification

Upon initial account setup, the primary Account Contact will be asked to complete the setup of your organization profile. Note: the Organization Profile is a critical component to all grant applications. This is not something done once and finalized; when you apply for a grant, the financial and board documents attached to your Organization Profile MUST be up to date. These documents will be reviewed as part of your application and, if they are outdated, can result in an administrative decline of your application.

To complete setup or recertification, log in to the system and follow these steps:

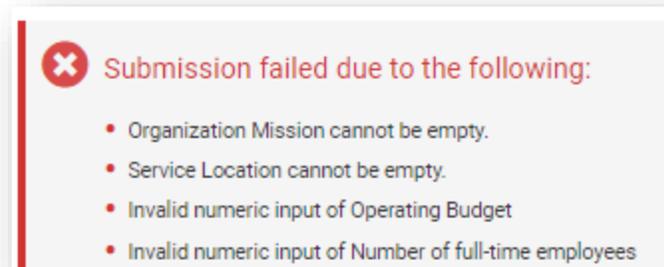
1. Click "Organization Profile" in the ribbon



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

**ORGANIZATION INFORMATION** CONTACT INFORMATION BUDGET BOARD CERTIFICATION ACTIVATE CONTACTS

3. Click "Edit Profile" to update the required fields.
4. Once you have made the necessary updates, click "Submit Profile" to submit the organization profile as complete and "Active".
5. If any fields are missing, you will receive an error message at the top of the page. Click each error line to be taken to the specific field.



6. If you are using a fiscal sponsor, please be sure that they complete their organization profile including the certification requirement prior to the Funding Opportunity Application Deadline.

Key items to note in the Organization profile:

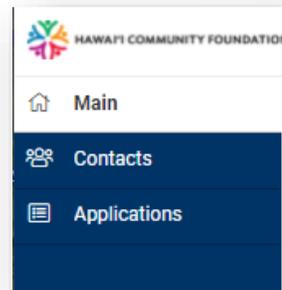
- **Organization Information**
  - Legal Organization Name: If this needs to be changed, please submit a [support ticket](#).
  - Organization Name for Publication: In many cases, this will be the same as your legal organization name. The contents of this field will be used in publications.
  - IRS Letter upload: This is not a required field, however some Funding Opportunity Guidelines will note if this is required. Please review the respective guidelines for which you are applying for.
- **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 include: a balance sheet, financials (a copy of your 990 or audit), and a current year organizational budget. Note: the organizational budget is NOT the same as the program budget, which reflects how you plan to spend the grant funds requested.
  - If your organization does not have these documents, or you are confused about what is required, please submit a [support ticket](#).
- **Board**
  - Make sure your most up to date board list is posted. If you are an organization does not have a board, please upload a PDF document with a note stating that you do not have a board.
- **Certification**
  - This certification must be completed every 6 months. You can update the information at any time, but the 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. Note: you will be able to certify even if your documents are not current. This does not guarantee that your Org Profile is updated for a grant application.

- **Activate Contacts**
- To *deactivate* a contact, please submit a [support ticket](#). Note: we rarely delete old contacts as they are part of the history of the organization. But contacts will no longer have access to the account.
- 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.
- In the “Applications” tab you can review all applications that have been submitted through your organization. If they were submitted before 2022, AND you need a copy of old reports, applications, or award letters, please submit a [support ticket](#) with the grant #, what information you need, and any details that will assist us in fulfilling your request.



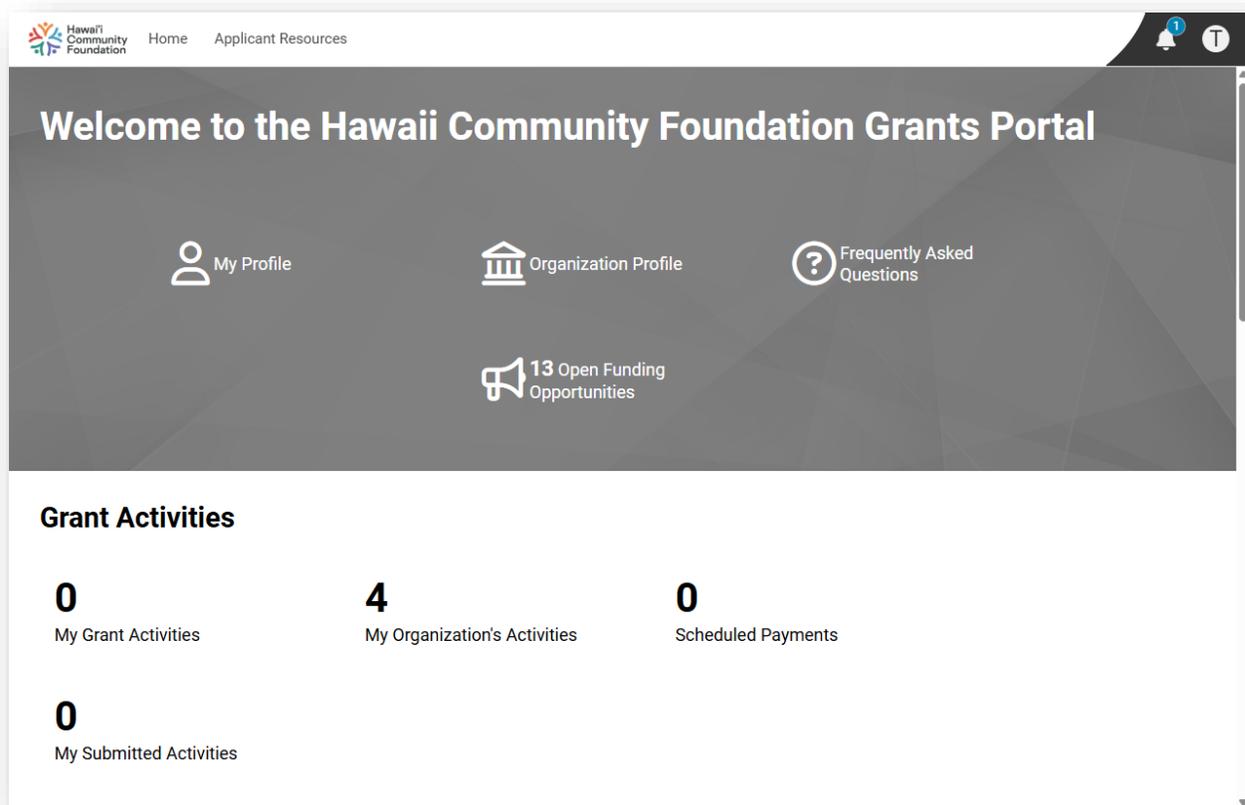
#### Activate Account Contact Requests

- 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.

Click the X in the top right corner of the pop-up window to return to the Organization Profile.

## Applicant Portal

This is your home page of the Grants 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.

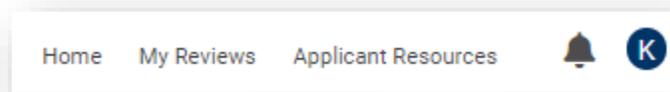


### Top Left Navigation

- **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 report templates, budget templates, etc. Please reference the Funding Opportunity guidelines for the list of documents required for your application or grant.

### Top Right Navigation

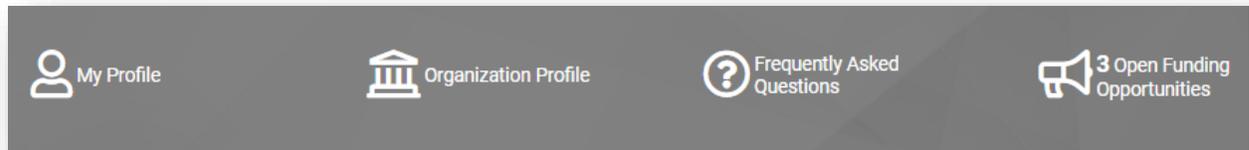
- **Notifications (Bell Icon):** Click here to see notifications related to your account.
- **Account Settings (First Initial Icon):** Click here to access alternate links to your profile and your Organization's Profile, to change your password, and to log out.



### Shortcut Tiles

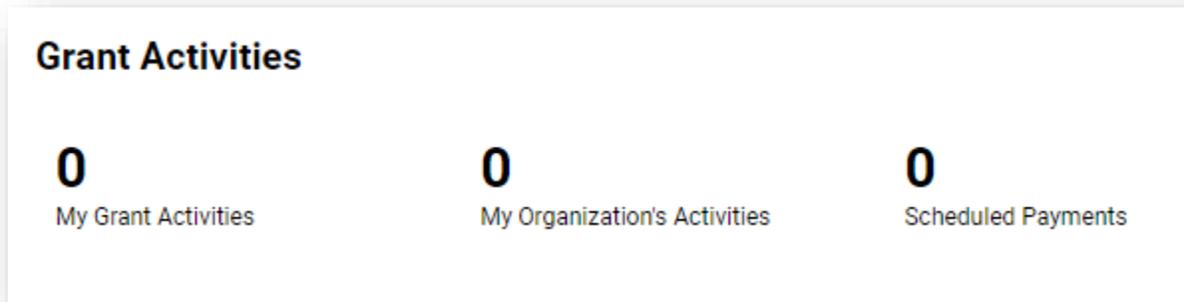
- **My Profile:** View and edit your personal contact information.

- **Organization Profile:** View and edit your organization’s profile information. Organizations are required to confirm that their organization’s profile is up to date at least every 6 months.
- **FAQs:** Find answers to our most frequently asked questions.
- **Open Funding Opportunities:** View all the available funding opportunities.



## Grant Activities

- **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. If your organization needs you to submit a report for a grant that you have not been assigned to, please submit a [support ticket](#).
- **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 for Revision 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. Active grants will have payments and/or reports scheduled.
- **Historical Grants:** Grants that have been closed and declined applications.

## My Application Tracker

IN PROGRESS (0) SUBMITTED (0) ACTIVE GRANTS (0) HISTORICAL GRANTS (0)

0 of 0

# Application Name Project Title Organization Applicant Status Created Date Amount Requested

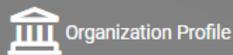
## Application Tips

### Submitting an Application

1. We advise that you give yourself ample time to complete an application and to ensure that your Organization Profile is up to date. Although our Web Support team can sometimes assist you right before a grant deadline, we cannot guarantee that your issues can be resolved immediately. In general, if you need assistance, please allow at least one business day.
2. Review your Organization Profile to make sure all required fields have been completed. If the profile is incomplete or has not been recertified every 6 months, you will be unable to submit your application. If you are using fiscal sponsor, this will also apply to their Organization Profile.
3. Avoid creating multiple “Draft” applications. Instead, please work on one draft application that you have saved. Creating multiple draft applications can get confusing and you may inadvertently work on – or submit – the wrong draft.
4. Click “Open Funding Opportunities”.



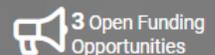
My Profile



Organization Profile



Frequently Asked Questions



3 Open Funding Opportunities

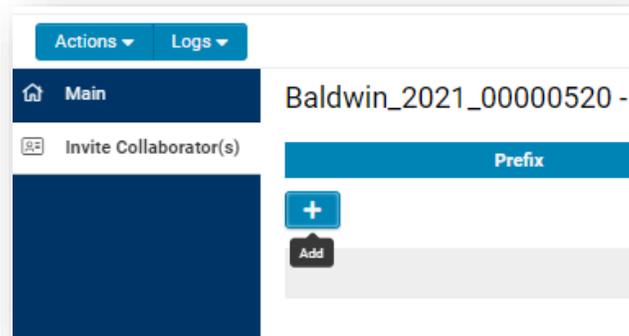
5. Click the “Download” button to review the grant application requirements.
6. Click “Apply” to start your application.

## Open Funding Opportunities

1-3 of 3

Funding Opportunity	Description	Deadline	Guidelines
Fred Baldwin Memorial Foundation	The Fred Baldwin Memorial Foundation believes that supporting the people of Maui County and their environment is important, not just because of the impact on the community but because it reflects and perpetuates the shared values of our family and founders.	11/24/2021 12:00 AM	Download  Apply

7. 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.*
8. If you are collaborating with a colleague (internal or external) to submit this application, select “Invite Collaborator(s)” from the left navigation pane (see page 15 for detailed instructions). If not, please continue to step 11.



9. 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.
10. Return to the main application by clicking "Main" in the left navigation.
11. Complete all required fields in all application tabs. Note that these tabs may change depending on the application that you are submitting.

\* **Organization:** Association of Fundraising Professionals

\* **Application Contact:** AFP Contact

**Print Application:** View/Print

**Application ID:** Baldwin\_2021\_00000520

**Deadline:** 11/24/2021 12:00 AM

**PROGRAM OVERVIEW** | PROGRAM INFORMATION | BUDGET | SUPPORTING DOCUMENTS

\* **Program Title:**

\* **Duration (in months):**

\* **Area of Interest**

Select the broad area of interest that best fits your program.

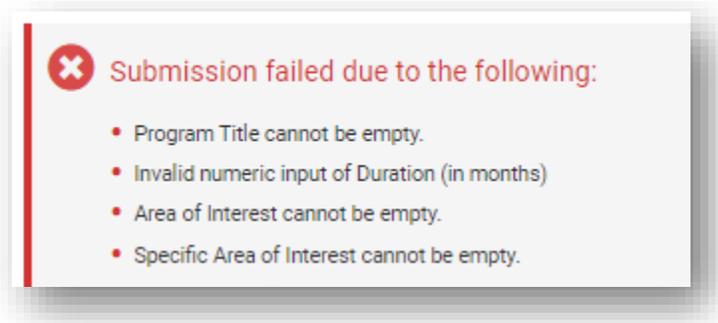
--Select One--

\* **Specific Area of Interest**

Select the specific area of interest your program addresses.

--Select One--

- **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. If you are using a fiscal sponsor, your fiscal sponsor will also be required to certify your application prior to submission (see page 19 for detailed instructions).
12. You can toggle between tabs by clicking them, or by selecting the “Next” and “Back” buttons at the bottom of the form.
  13. After completing all required fields, click “Save Draft” to save all your edits and then “Submit” to complete the submission of your application.
  14. 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.



15. Upon completion, you will receive an email confirming submission. If follow up is needed regarding your application, you will receive emails from the Grants Portal. Please mark any emails from [donotreply@hawaiicomunityfoundation.org](mailto:donotreply@hawaiicomunityfoundation.org) 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.

### Inviting a Collaborator

Please follow steps below to invite others or your Fiscal Sponsor to collaborate with you on an application.

Note: As the Application Contact, you will have the ability to submit the application. Collaborators will not have permission to submit the application.

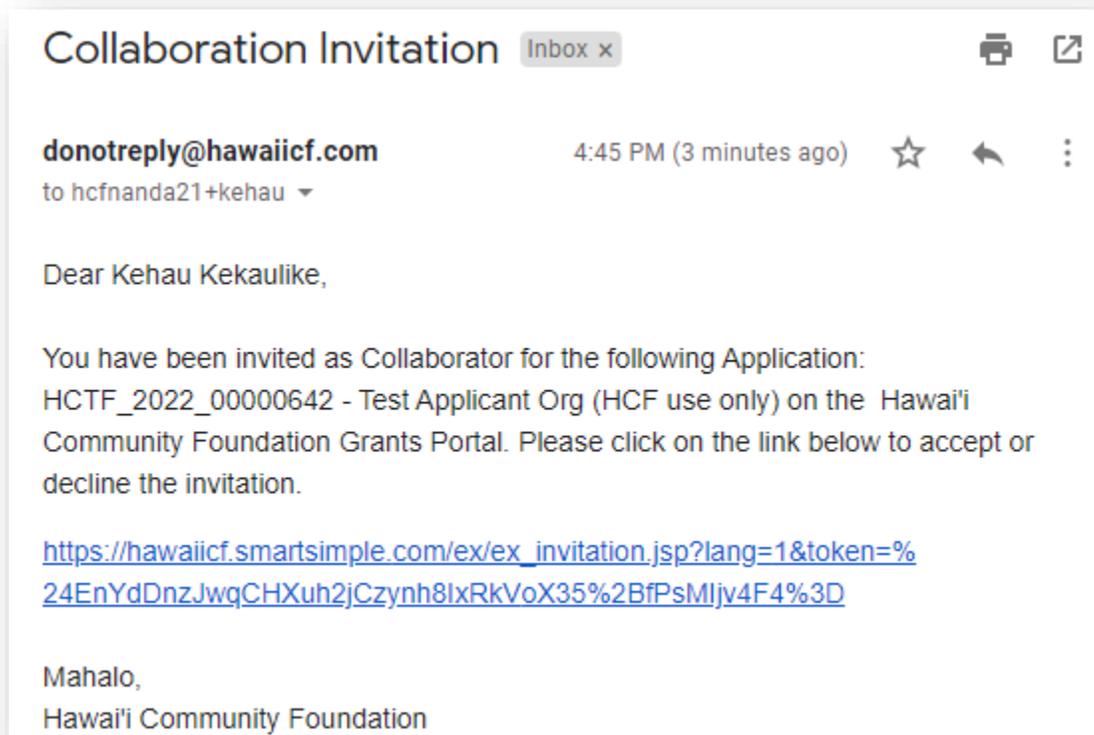
1. Click the **Invite Collaborator(s)** link on the left-hand navigation panel of the application screen.



- Click the “+” button and add a line for each contact you wish to add. Enter the required information and click **Invite** to send the invitations.

Prefix	First Name	Last Name	Email	Role	Status
	Kehau	Kekaulike	kehaulike@gmail.com	Collaborator	Draft
				-- Select One --	Draft

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



- 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\_00000842 - 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:  
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:

## 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.

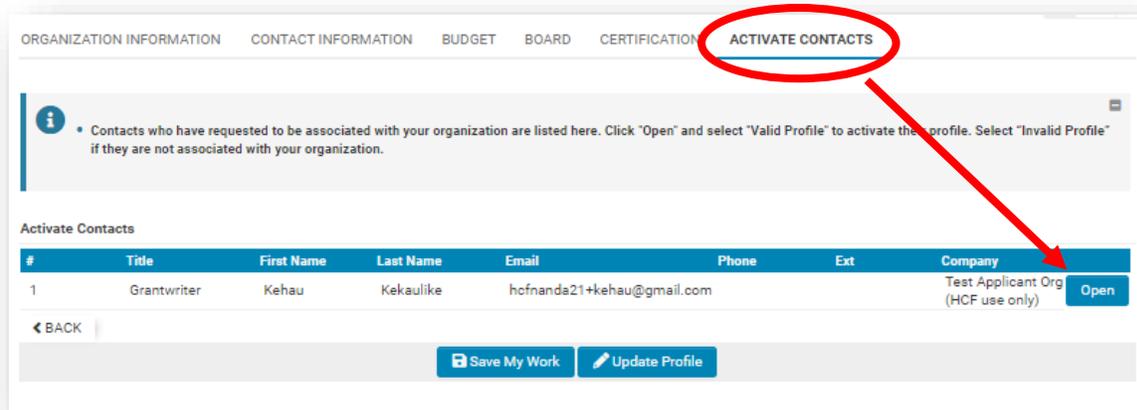
Please note that as a collaborator you will not be able to submit the Application.

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

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



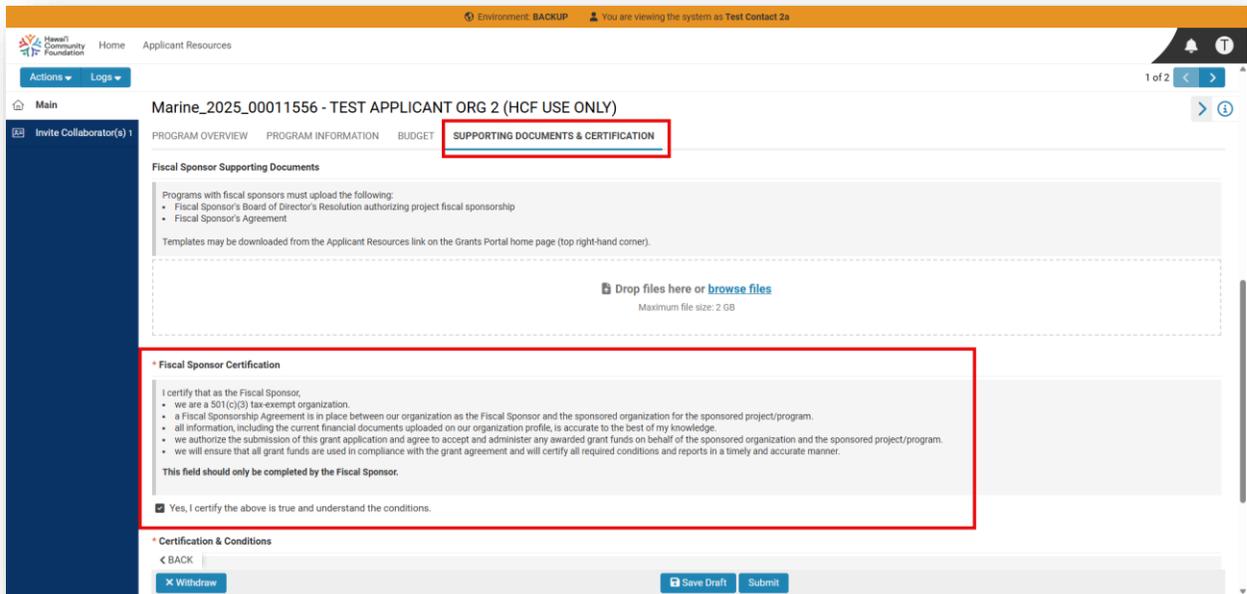
After the collaborator is activated, they will receive an email with a password reset link. Once they log in, they can access the application in the “In Progress” section of the My Application Tracker section of the home screen.

### Fiscal Sponsor Information

If your organization is applying for a grant using a Fiscal Sponsor, please work with your Fiscal Sponsor to complete the following tasks. Again, we recommend that you allow ample time to complete this as you will be unable to submit your application without your Fiscal Sponsor’s certification being complete.

Your Fiscal Sponsor must:

1. Complete the [Fiscal Sponsor Resolution and the Fiscal Sponsor Agreement forms](#). These may also be downloaded from the Applicant Resources link on the Grants Portal home page (top left-hand corner).
2. Complete their organization profile in the Grants Portal prior to the Funding Opportunity Application Deadline. This includes providing up-to-date financial documents and board list, and completing the profile certification requirement. Please see page 8 for instructions on Completing Organization Profile Setup/Recertification.
3. In the application under the Supporting Documents & Certification tab – your Fiscal Sponsor must certify and approve your application prior to submission. To do so, please invite your Fiscal Sponsor as a Collaborator. Please follow the instructions above on how to invite a Collaborator. Once invited as a Collaborator, your Fiscal Sponsor will have access to your application to complete the certification field.



4. Once your fiscal sponsor has certified your application, they will notify you that it has been completed and you will then Submit your application. Your fiscal sponsor will not have the ability to submit the application for you.
5. Note: A Fiscal Sponsor organization (501c3) should NOT be named as the applicant organization for a grant to support the organization they are sponsoring. The applicant organization must apply for the grant, indicating they are using a Fiscal Sponsor (and name the sponsor organization), and upload the Fiscal Sponsor Resolution and the Fiscal Sponsor Agreement forms as part of the application.

### 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.

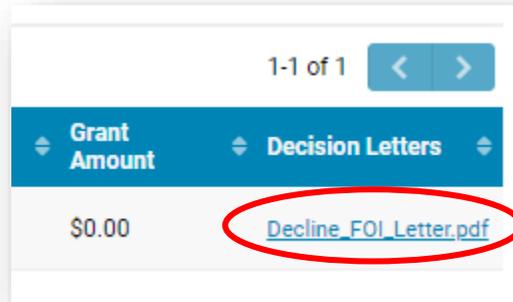


3. You will see a popup of your completed application and listed attachments that can be electronically saved or printed for your records.

### Decision Notifications

After your application has been reviewed, the Chief Staff/Volunteer of your organization, Application Contact, and Fiscal Sponsor (if applicable) 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.



Grant Amount	Decision Letters
\$0.00	<a href="#">Decline_FOI_Letter.pdf</a>

### Requesting Copies of Historical Applications

If you need to request any historical application or grant records that are not found in the Grants Portal, please contact the staff on your original Grant Award Letter. If you do not have a copy of the award letter, submit a [support ticket](#) and include the Grant Number or as much detail about the grant as possible.

## Application and Grant Revisions

### Completing Revision Request on an Application

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 “Action Required: Review and resubmit your application.”

1. Log in to the Grant Portal.
2. Go to My Application Tracker and under the “In Progress” tab, you will see the application to revise with a status of “Revisions Requested”. Click to open the application.
3. Your application will automatically open in “Annotation Mode”. The application sections requiring revision will be listed on the right side under the “Annotation List”.

HAWAIFI COMMUNITY FOUNDATION

Home Applicant Resources

Actions Logs

Annotation Mode  
Click a field for annotation options.

1 of 2

Atherton\_2025\_00008972 - TEST APPLICANT

**Instructions**

To make the necessary revisions, please follow these steps:

1. Revisions requested will be displayed on the "Annotation List". Click on the revision listed. It will highlight the section you need to revise in your application.
2. Click "Reply" and a window will open that will allow you to make the revisions for that section.
3. Once you have made your revision, add a brief message that you have completed the revision (for example, "I've revised this section." Do not include any application information in the message as it will not be reviewed). Click "Save".
4. Click the "Save" button.
5. Repeat for each revision requested.
6. Once all revisions have been made, click on the "Submit" button at the bottom of the screen.

\* Organization: TEST APPLICANT ORG 3 (HCF USE ONLY)

\* Application Contact: Test Contact 2a

Print Application: View/Print

Application ID: Atherton\_2025\_00008972

Deadline: 01/06/2025 04:00 PM

Revision Deadline: 01/24/2025 04:00 PM

**Annotation List**

ACTIVE

**Organization (1)**  
Please update your organization profile with following:  
Upload current operating budget ...  
Last replied by Another User on 01/23/2025 07:13AM

**Organization Description (1)**  
Please provide examples.  
Last replied by Another User on 01/23/2025 07:14AM

**Budget (1)**  
Please upload revised program budget  
Last replied by Another User on 01/23/2025 07:14AM

4. Click the item listed, and the section in your application that needs revision will be highlighted on the left.
5. Click the "Reply" button to make the required revisions to the field. Depending on the section you are revising, you will see an option to upload a file, check a box, or modify text.
6. Once you have made your revision, add a brief message that you have completed the revision (for example, "I've revised this section."). **\*Do not use this section as a message board or include any application information in the message as it will not be reviewed. Please email the program staff if you have any questions. Click "Save".**

Reply

Field Value:

Drop files here or browse files  
Maximum file size: 2 GB | Allowed file types: PDF

<input type="checkbox"/>	File Name	Size	Date
	9_5_23_The_Foo...	63.6 KB	08/07/2024 5:40 PM
	9_5_23_The_Foo...	63.6 KB	08/07/2024 5:17 PM

Total Files: 2

Message:

I have added my file.

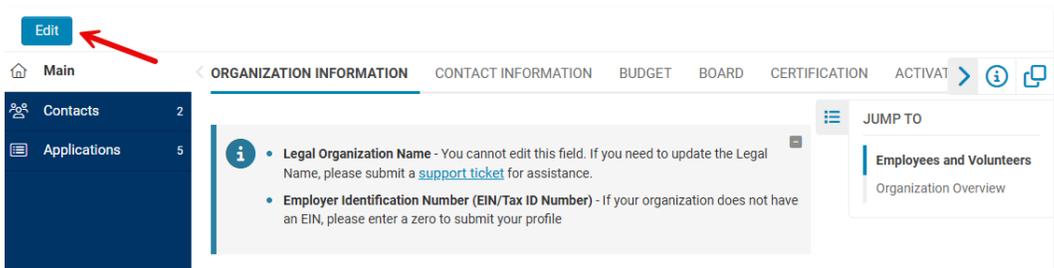
A short message must be added here.  
Do not include any application information as it will not be reviewed.

Save

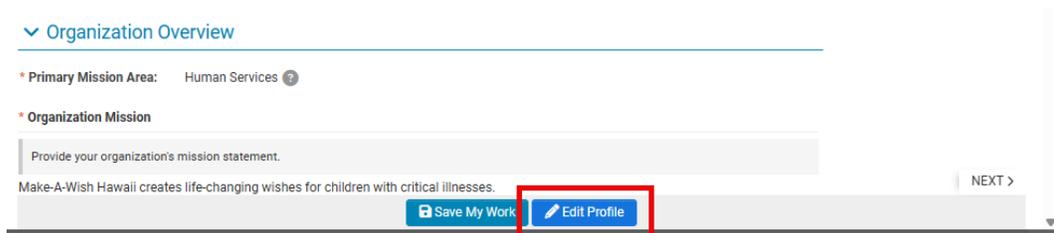
7. For revisions to your Organization Profile,
  - a. Click on the square icon with an arrow on the right of your organization name. Your organization profile will open in a pop-up window.



- b. Click “Edit” on the upper left of your Organization Profile.



- c. Click “Edit Profile” button at the bottom of the window



- d. Update info as indicated by HCF staff
  - e. Once completed, click “Submit Profile”. **\*If you do not click “Submit Profile” your account will be considered incomplete.**
  - f. Close window using X in upper right corner to return to your application
8. If you are using a fiscal sponsor, please see further instructions below.
  - a. Please note that if you have a submitted application using a fiscal sponsor, the Chief Staff assigned to their organization profile will automatically be assigned to your application.
  - b. If a Fiscal Sponsor Certification revision is requested, please note that the fiscal sponsor contact assigned to your application will have direct access to your application from their portal. Please reach out to them to recertify your application prior to resubmission.
9. After all annotations are completed, click “Submit” to resubmit your application with all revisions.

## Withdrawing an application

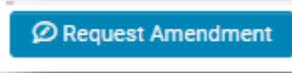
At the *In Progress* or *Submitted* stages of the application process, you can Withdraw from the application process by clicking the **Withdraw** button at the bottom left of the application screen.



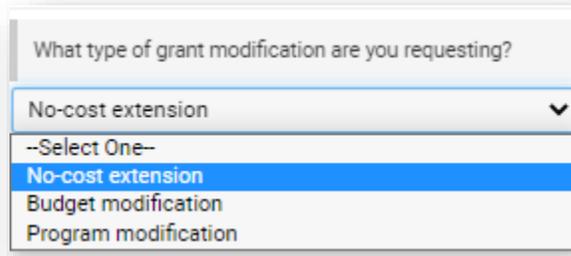
## Requesting a No-Cost Extension

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.

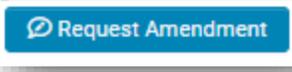


5. Enter the proposed end date.
6. Enter information about why you are requesting the extension in the “Extension Request” section of the form.
7. Upload any supporting documents if needed.
8. Click “Submit” to submit your request.
9. Staff will review the request in the system, and you will receive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

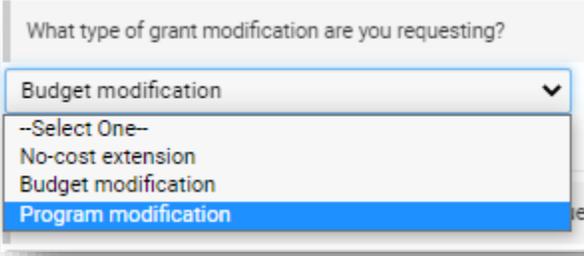
## Requesting a Program Modification

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.

A blue rectangular button with a white circular icon containing a refresh symbol and the text "Request Amendment" in white.

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

A screenshot of a web form. At the top, it asks "What type of grant modification are you requesting?". Below this is a dropdown menu. The current selection is "Budget modification". The dropdown is open, showing a list of options: "--Select One--", "No-cost extension", "Budget modification", and "Program modification". The "Program modification" option is highlighted in blue.

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.

## Submitting Conditions & Reports

For most grants, you will be required to submit a final report and occasionally a progress report. For details on what is required for each grant and when they are due, please review your award letter. If you are not sure what format this program uses, please find the report under your My Grant Activities. **If you have a final report noted in your award letter from a private foundation, please review your award letter for final report instructions.**

Reporting requirements can be found at the “Applicant Resources” link on the left-hand corner of the Grants Portal. Please make sure you find the form that is specific to your grant program.

If you are using a fiscal sponsor, they will need to certify/approve your report or condition prior to submission. Please see page 27 below to complete your reports and conditions using a fiscal sponsor.

### Submitting a Final Report (Upload Format)

Please follow the instructions below to submit a final report with an upload format.

1. Log in to the Grants Portal
2. Click the “My Grant Activities” tile in the Action Items section.

## Grant Activities

### 1

My Grant Activities

3. To upload a final report, click the applicable line. The Activity Type will show progress report, final report, contingency, etc.



4. All reports and contingencies will be listed here. Select the applicable final report from the list. If this section is blank or you do not see the grant, the final report has not been assigned to you in the system. Please submit a [support ticket](#) with the Application ID and the request to switch ownership.
5. Click the Upload button and upload a .pdf file of your final report.
6. After the report has been attached to the record, click "Submit". After your final report is submitted, it will be sent to the Program Lead for review. If they have any questions, they will reach out.

### Submitting a final report (Form Format)

Please follow the instructions below to submit a final report with a form format.

1. Log in to the Grants Portal and open "My Grant Activities" under the "Grant Activities" heading.

## Grant Activities

### 1

My Grant Activities

2. Click the applicable Activity Type, whether it be a progress report, final report, contingency, etc.

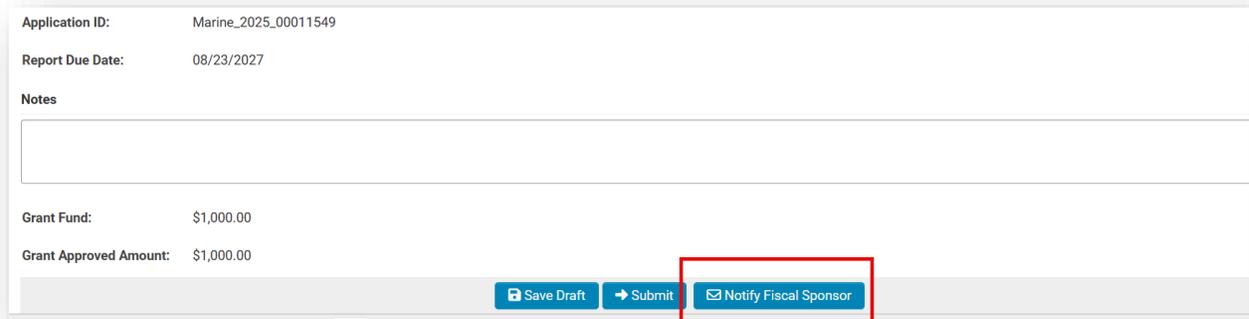


3. Follow the instructions within the Grants Portal to complete your report.
4. After the form is filled out, hit the "Submit" button to submit the report for review.

## Submitting a Condition or Report with a Fiscal Sponsor

If you have a grant using a Fiscal Sponsor, please follow the instructions below to submit your report.

1. Log in to the Grants Portal and open the “My Grant Activities” tile under the “Grant Activities” heading.
2. Click the applicable Activity Type, whether it be a progress report, final report, condition, etc.
3. Follow the instructions within the Grants Portal to complete your report.
4. Once completed you should see a button at the bottom of your screen to Notify Fiscal Sponsor.



Application ID: Marine\_2025\_00011549

Report Due Date: 08/23/2027

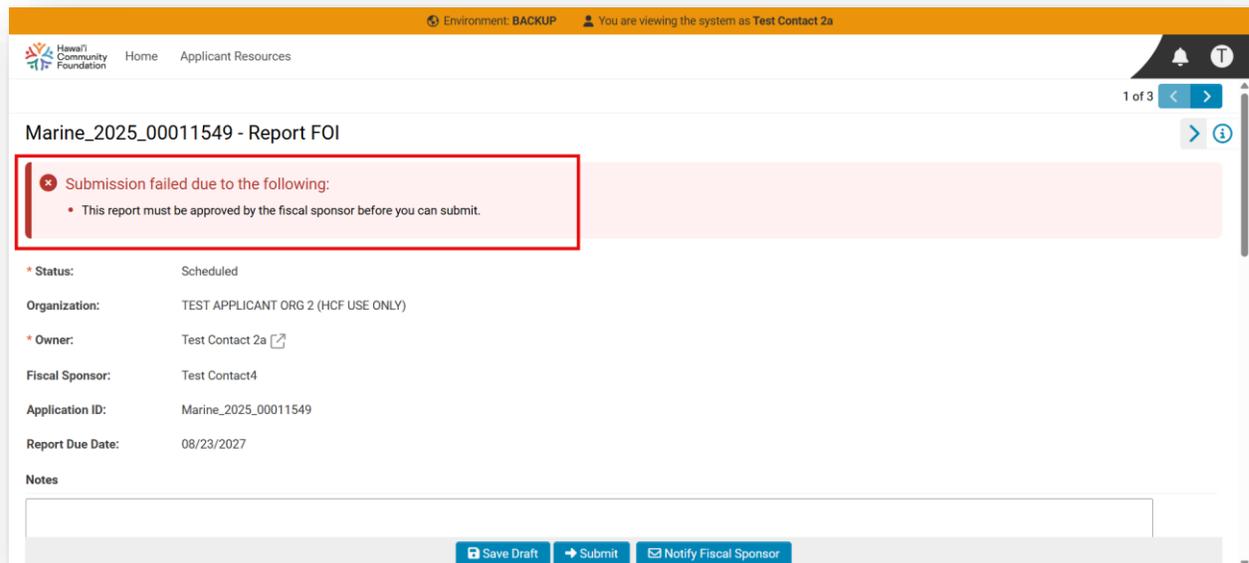
Notes

Grant Fund: \$1,000.00

Grant Approved Amount: \$1,000.00

Save Draft Submit Notify Fiscal Sponsor

5. Note that you will not be able to submit your report or condition unless it has been certified by your Fiscal Sponsor. You will get the error message below if you try to submit without the Fiscal Sponsor certification.



Environment: BACKUP You are viewing the system as Test Contact 2a

Home Applicant Resources

Marine\_2025\_00011549 - Report FOI

Submission failed due to the following:

- This report must be approved by the fiscal sponsor before you can submit.

\* Status: Scheduled

Organization: TEST APPLICANT ORG 2 (HCF USE ONLY)

\* Owner: Test Contact 2a

Fiscal Sponsor: Test Contact4

Application ID: Marine\_2025\_00011549

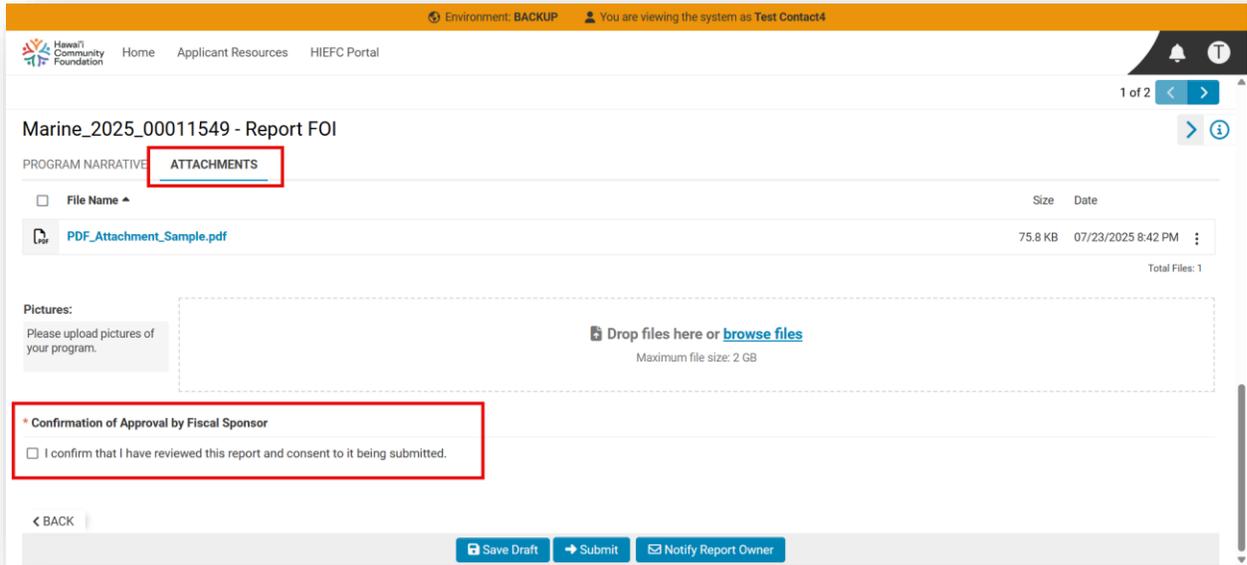
Report Due Date: 08/23/2027

Notes

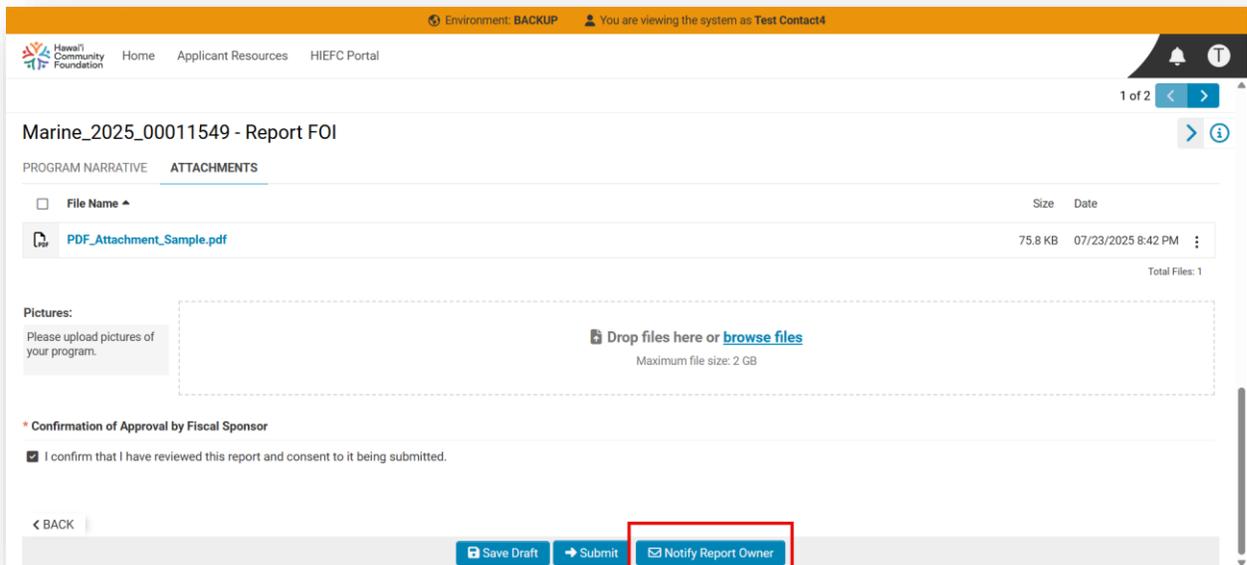
Save Draft Submit Notify Fiscal Sponsor

6. Please click the Notify Fiscal Sponsor button to inform your Fiscal Sponsor that the report is ready to be approved and certified.

- Once your Fiscal Sponsor is notified, they will receive an email notification to log into the portal to approve your report.
- They will log into the portal to access your report. They will find your report under My Organization Activities. They will select the report and navigate to the Attachments tab to see a certification box as shown in the image below.



- Once they have checked the box, they will have the option to Submit the report or notify you that it has been approved. They will find a button at the bottom of the page to Notify Report Owner as shown in the image below.



10. If they choose to click the notify button, you as the applicant will receive an email notification that the report has been approved. You can then go back into the report to do the final submission.