Reviewer Grant Portal Guide

Welcome! We are excited to introduce you to our improved Grant Portal through Foundant Technologies, **our technology partner.**

This guide will assist you in accessing your account, reviewing grants, and managing your dashboard in the portal. Please use these helpful documents, links, and other support noted within the Grant Portal to help you get started prior to reaching out to Community Foundation staff. For issues or questions, reach out to grants@cffoxvalley.org.

1) **Site Access**
   You will access the Grant Portal via the **log on page**. We recommend that you bookmark this page in your internet browser for ease of access.
   - The Community Foundation will create a user account for you in the Grant Portal to use as a reviewer and an email will be sent to you.
     - NOTE that you can be both a reviewer and applicant on the same user account. If you have already registered as an applicant and will also be a reviewer, this is a setting that the Foundation must manage internally on the backend of the system. Please contact us if you need to access the Grant Portal as both a reviewer and applicant.
   - When you log on for the first time, you will need to reset your password
     - Click on the Forgot your Password? link (under the Log on and Create New Account buttons)
     - Follow the system prompts
       - The system will send you an email to reset your password (the email address where you received your initial email from Community Foundation staff is the email that was used to set up your user profile).
     - Choose a Password that meets security requirements.
   - **We recommend you add administrator@grantinterface.com to your safe sender list as system notifications, such as assigned application reviews, will come from this email.**

2) **Navigating Your Dashboard**
Your dashboard houses your assigned Evaluations and Follow Ups (you will have little to no Follow Ups assigned to you, as a Reviewer, as the Community Foundation does not have Reviewers complete Follow Ups, i.e. progress or final reports, at this time).
- o Within the 'Your Evaluations' tab
  - ▪ A list of all your assigned Evaluations will be shown
  - ▪ The status of your Evaluation is shown on the very right and will list one of the following
    - • Start – to begin your evaluation on an application
    - • Continue – to continue completing a draft evaluation previously started
    - • Update – to make changes on an evaluation you've previously completed
    - • View – to view your evaluation on an application that is no longer open to conduct an evaluation on


- o To open the application you wish to view and evaluate:
  - ▪ Click on the status next to the application you wish to view, it will bring you to the evaluation form connected to that application
    - • Information tabs are available at the top (e.g. Documents) to read additional information about the request, applicant, and organization (if applicable), and any comments or documents the administrator has uploaded.
    - • Below that, you will see a copy of the application on one side and a copy of your evaluation form on the other.

- Additional action options
  - Click on the **Evaluation Packet** button to download a PDF of your evaluation form and responses.
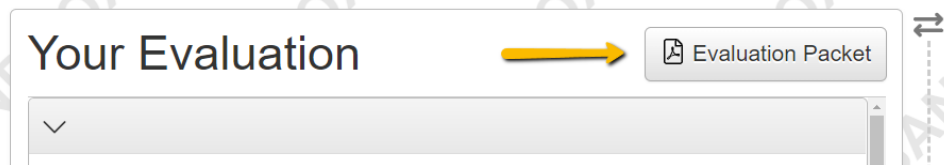

  - Click on the **Application Packet** to download a PDF of the application you're evaluating
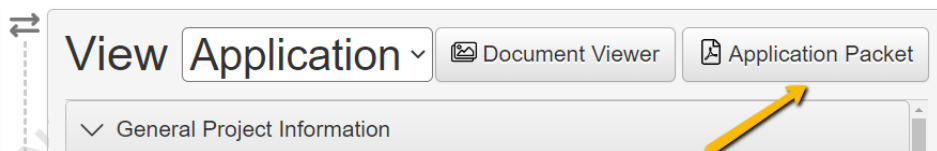
  - Click on the **Document Viewer** button to view all documents the applicant has uploaded as part of their form responses. This is important because if you click on documents one by one, they will be downloaded to your device.
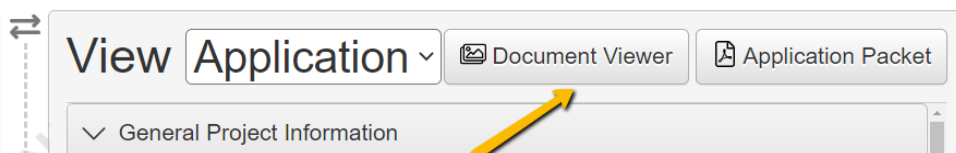
- Click on the **eye** icon to view an individual document by the applicant. This is important because if you click on document name, it will be downloaded to your device.
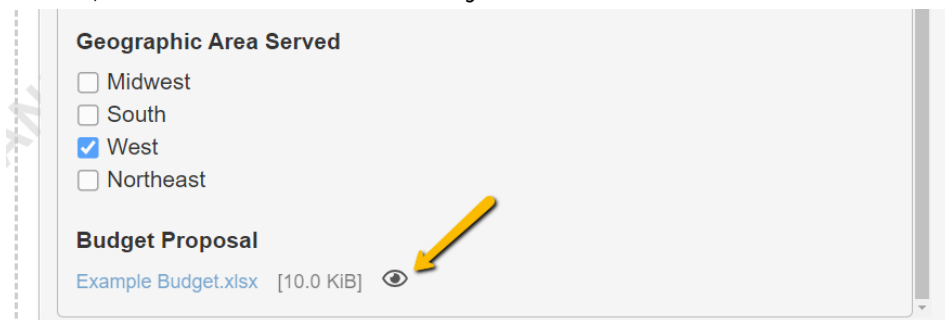
3) **To Complete Your Evaluation**
   - Once you've opened the evaluation you wish to work on, fill out of the evaluation form questions
     - Required questions are indicated with an asterisk.
     - The system will auto save your comments every 100 characters you type and when you click out of a field. You can also click the **Save** button at the bottom right of the page when you've finished working on the evaluation.
   - The confirmation page lists any required questions you haven't yet answered and gives you the option to navigate back to the same evaluation, to your dashboard, or to the next incomplete evaluation on your list.
   - Even after you've completed all the required questions for an evaluation, you can edit your responses up until the site administrator closes evaluation questions for the request.

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 can update your user information or change your password. Be sure to click save in the bottom right corner once you've finished.
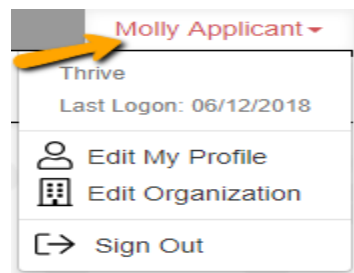
Note: You will be automatically logged out of the Grant Portal after 90 minutes of inactivity (you will receive a warning message at 80 minutes of the pending "time out").

If you need assistance after reviewing all of the resources email grants@cffoxvalley.org and we'll work with you, and with our technology provider if needed, to resolve any issues.