Grant Application Tutorial

You will access the online system via the log on page, which is hyperlinked on our website, taoscf.org.
- It is recommended that you bookmark this page in your internet browser for ease of access.
- If you have already created an account you may enter your email and password and log in, otherwise, you'll want to click on the Create New Account button.
- If at any time after creating an account, you can't remember your password, you may click on the Forgot Your Password button, enter your email address, and you will be sent a link to reset your password.

CREATE NEW ACCOUNT:
Creating a new account is a multi-step process;
- The first section collects **Organization Information**;
- The second section collects **User Information**;
- Sections three and four collect **Executive Director** information.
- After Organization Information has been entered click on the "**Next**" button.

The next section is the "**User Information**" section, or YOUR information.
- If your address is the same as your organization's you may use the "**Copy Address from Organization**" button to automatically pull the address information from the organization address fields into the address fields in this section.
- It is very important to note that the email address entered in the **Email/Username** field becomes the Applicant's **Username** in the system**.**

Once the fields on the "**User Information**" section are completed, click on the "**Next**" button.
- Please note that should you need to navigate to previous section in the registration process, you must use the "**Previous**" button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using the browser's "back" button you will lose all registration information entered.

In the next section you indicate if you are the Organization's Executive Director.

- If you are the Executive Director, select "**Yes**." You are taken to a section of optional fields that includes only the fields that were not required in the **"User Information"** section.
- If you are not the Executive Director, select "**No**," and complete the required Executive Director fields.
- Once the Executive Director's information is entered, click on the "**Next**" button to create a password.
- Password requirements are listed at the top of the section, so you can create a password accordingly.
- Once the password is created, click the "**Create Account**" button.

EMAIL CONFIRMATION:

- Upon clicking Create Account you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system.
- Follow the onscreen instructions and click the "Continue" button to finish the registration process. Now you have an account in this system. Remember, this is an account that you will use for both present and future applications.

APPLYING FOR FUNDING

Upon completing registration and accessing the system for the first time, you will land on the **Apply Page**. This page will show you any currently open opportunities that you can apply for, as well as any relevant deadlines and other applicable information related to them.

- You can preview the application without having to save any work by clicking on the "Preview" button.
- To start a request, click on the blue **"Apply"** button under the opportunity you'd like to apply to.
- Clicking Apply will take you into a form to complete and submit.

Once in the form, note that your contact and organization information automatically populates at the top of the form.
- You may update your contact information and view your email history.
- If you wish to change your organizational information, you must contact the Foundation directly.
- If you'd like a PDF copy of the application, you can click the Question List button.
- Once you've completed the form, you may click the Application Packet button to download a copy of the questions and your responses.
- Please note that deadlines will be listed at the top of the form. You will not be able to submit once the deadline has passed.

Work your way through the form responding to the fields.
- Note that any fields with an asterisk are required fields and must be completed prior to submitting an application.
- As you complete the form, the system will auto-save every 100 characters typed or every time you click out of a field.
- You may collapse question groups as you go, once you've finished all of the questions in that group, as an indicator to yourself that you've completed that section and reduce scrolling.
- Some fields have character limits.
- Responses that are longer than the set limit will be saved, *__but__* an error message will appear informing the applicant that the limit has been exceeded.
- You will not be allowed to submit the form until the length of the response has been decreased in accordance with the limit.

File **upload fields** will only accept one file per field. Upload fields have size limits.
- If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing the applicant that the file is too large and the file **will not** be saved.
- Upload fields may also have File Type restrictions.
  If you attempt to upload a file type in an unaccepted file type acceptable file type you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
- Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name and a new file can be uploaded.

Even though the system is auto-saving there is still a "**Save"** button at the bottom of the form.
- When you click save you are taken to a confirmation page so you know the save was successful. If you click "**Continue**" you will be taken back into the form so you can continue working.
- If you save and exit the system, you will access the **draft of the form** from your **Dashboard** the next time you log in.
- Pick back up where you left off by clicking "**Edit**" link to the right of the request.

You may abandon the request if it is the first form to be submitted for this request.
- Once the first form has been submitted you must contact an administrator to withdraw the request from consideration.
- After selecting Abandon Requests, you must type in Abandon Request and select OK
- The request will then be visible in the Historical Requests tab just as it would if an administrator had abandoned the request.
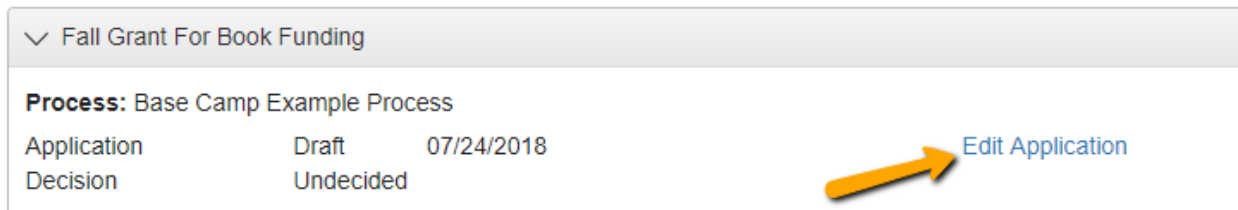
When all of the fields are complete, submit the application.

- If any required fields were not completed, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
- An error message appears listing the fields that need to be completed or edited.
- These fields are outlined in red so they are easy to identify as the applicant scrolls through the form.
- When a form is submitted successfully, the applicant will be taken to a confirmation page.
- When you click "**Continue"** you are taken to your dashboard where you can VIEW your submitted request.
- Note that once an application has been submitted you can no longer edit it.

APPLICANT DASHBOARD

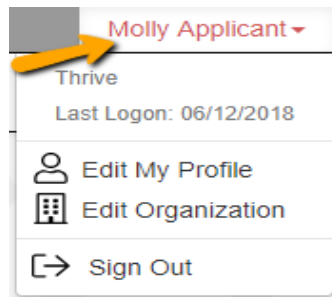Your dashboard houses current and historical requests.

- The active request tab houses all current requests. These are the requests still requiring action, awaiting a decision and/or requests that have not yet been marked closed by the site administrator. Within each request you can see forms, form statuses and submission dates and, if applicable, form deadlines.

- You may continue working on saved forms by clicking the edit option next to the form.

- If you wish to edit your account information or change your password, click your name in the top right. This will expand a drop-down menu. If you click Edit my profile, you will be able to update your user information or change your password. Be sure to click save in the bottom right once you've finished.