



A Guide to Applying for a Community Foundation Grant Online – Revised July 2016

This document compiles information and support materials for the Community Foundation for Monterey County’s online system for managing applications and grants – the Online Grants Manager.

How CFMC’s Online Grants Manager Works:

To apply for a grant, you must first create an account in the Online Grants Manager, then log on to that account to access the list of available grants and start a new grant application. Your application can be saved as a draft at any time, and when you log on again, it’s easy to return to that draft, make edits, and submit the application. Each account maintains a record of the application history that you can access at any time. Once a grant is awarded, the Online Grants Manager allows organizations an easy way to track the status of the grant, check due dates, and submit electronic grant reports right from their account. We recommend that you read the instructions carefully and reference materials found in this document before registering and starting your first application.

Creating Your Online Account

All applicants are required to create an account. Only one account per organization is allowed. At the time of registration, you are required to enter the following information:

- A username that is an email address*, typically the executive director or grant writer’s (or equivalent) email
- Your organization’s contact information, including address and telephone number
- Your organization’s information, including the EIN/Tax ID number
- Contact information for the organization’s executive director, if different from the username

Once you have created your account, you will receive an automated message from administrator@grantinterface.com. If you do not see this email, look in your junk or spam folder. Please add this email address to your safe contact list.

*An email address may only be connected to one organization’s account. If you are a grant writer for multiple organizations, [please contact us](#) to discuss your options.

Organizations are responsible for keeping all contact information up-to-date. Please call us if you have any questions or need assistance in updating your online account, 831.754.5880.

Grants are paid to incorporated 501(c)3 nonprofit organizations or to a public entity, such as a city, public school, or county agency applying for charitable purposes. All other applicants will need to use a nonprofit fiscal sponsor. Review the grant guidelines and contact us if you have any questions.

Managing Your Online Account – For Users

Once your account is set up, your account dashboard is displayed on the screen when you log on. From the dashboard, you can:

- Edit your contact information;
- Begin the application process;
- Access drafts and submitted applications and
- View grant details and complete the evaluation report for grant awards.

Managing Your Online Account – For Organizations

Only one account is allowed per organization because your history of requests and grants are in one place. The first person to register enters the organization's information, which creates the organization profile. It is important to enter this information accurately at registration, because after this point the organization profile can only be edited by Community Foundation staff.

If you would like to add or remove a user to your account, [please contact us](#). (Additional users can be added by Community Foundation staff.) If a staff person leaves the organization, contact us to update your account. Do NOT continue to use their login and password. Reminders regarding final reports and other grant notifications will be sent to the primary contact on the account. You are responsible for contacting us when your contact person changes.

In general, only the person who originally drafts and submits the application will have access to this application. Contact us if an additional user needs access to draft the application or needs access to complete the final evaluation report.

Helpful Tips

- For the best user experience when accessing our Online Grants Manager, we suggest using one of the following browsers: Google Chrome 14 or higher, Firefox 9 or higher, or Safari 4 or higher.
- We encourage you to read the Applicant Tutorial Instructions and Frequently Asked Questions also found on our [website](#) before beginning the application process.
- Read the grant guidelines regarding funding priorities and eligibility. Applicants must be current on reporting requirements for past grants. If you applied for previous grants using our online grant system, you can check your dashboard to see when the final report is due. Grants made

outside of our online system (2014 and earlier) have different required forms that can be found on our [website](#).

Online Grants Manager - Frequently Asked Questions

Q: Can I print or save the entire application so that I can work offline?

A: Yes, our online grant system allows you to save a PDF of all application questions. Once you start an application, you can click on “Question List” at the top of the page to download all of the questions on the form. Once you have started completing the form, click “Application Packet” to download the questions with the responses that you have provided so far.

Q: How do I upload files to the application?

A: For application questions that request an uploaded attachment, click the Upload button and then choose the desired document from your computer. Save or submit your application (at the bottom of page). Pay attention to your file names - remove extra periods or replace them with a dash or underscore character. You may only upload one document per question.

Q: How do I use the Fax to File tool?

A: Using the fax tool is simple:

1. To start, click the Fax to File link on the left hand side of the screen.
2. Then click the Request a Fax # button and you will be presented with a toll-free fax number.
 - You have this number for 20 minutes.
3. Fax your document to the number provided.
 - Send a separate fax for each document and do not include a cover sheet.
 - All faxed documents will be automatically converted to .pdf format.
 - You have 20 minutes to fax your documents before the number expires.
4. After you have faxed each separate document, click the Finished Faxing button to see your list of files.
5. Download your converted documents to your computer and save them.
6. Upload the documents to the appropriate questions on the online form.

Q: What is the maximum allowable file upload size?

A: The file size limit is noted next to the “Upload” button. The system will not accept files greater than this limit. Some users have trouble with appropriate settings on a scanner and end up with larger file sizes. If these documents are converted using the Fax to File tool, the file size can be dramatically decreased.

Q: How do I delete a file that I've uploaded to the application?

A: There are two ways to remove an uploaded file from an application:

1. Once the file has been uploaded, a “delete” button will appear below the file name. Clicking **Delete** will remove the file.
2. To replace the file, a new file can be uploaded in its place. Simply upload the correct form to the question and the old uploaded form will be erased.

Q: Can I upload more than one file in one upload field?

A: Applicants can only upload a single document in response to an upload question. If an applicant has more than one file to upload, the files should be combined either electronically or via scanning. There are two methods applicants can use:

- If the files to be uploaded are in a format that is editable (such as Word or Excel), the applicant may take multiple Word documents or Excel sheets and combine them into one file.
- If the files are not easily edited (PDF or hard copies), they may be combined by utilizing the Fax-to-File tool. For example, sending two documents in a fax would result in one PDF file containing both documents.

Q: Why am I having trouble uploading a file?

A: There are a few different reasons one may experience file upload issues:

- File names - Remove extra periods or replace them with a dash or underscore character.
- File size - Files that exceed the maximum file size limit will cause an error. Compress the files or use Fax to File to create a smaller file.
- We only accept files using this format: xls,xlsx, doc, docx, PDF.