

## **Grant Portal – Guiding Tips**

**Browser:** *Google Chrome* is the recommended browser for CFC’s grants management system. While other browsers are compatible with the system, visibility, functionality and performance is optimized in the Chrome browser.

**Registration:** Organizations must register to access the online grant system. The registration approval process will be completed within **three business days**, so consider this as you prepare to submit an application or report. Access the [login page](#) and click on “**Create an Account Now**” on the lower right side of the page to begin the registration process. **Please note** - If you’ve previously registered your organization, you **do not** need to register again. If you have previously registered and you need to add/remove access for a new or previous employee or update contact/organization information, use the **Contact Information Change Process** outlined at the end of this document.

**Access Account:** If your organization has completed the registration process, you are ready to use the new system. Access the [login page](#) and enter the log in credentials you were provided via email to access the grants management system. If you enter an incorrect user name or password more than three times, you may “lock” your account for up to an hour – wait 30-60 minutes before trying again. If you need to reset your password, visit the [login page](#) and click on the "Reset or create password" link below the sign in button.

**Saving:** When in the portal, save content entered regularly. This is a live system without an auto-save function.

**Edit:** After saving, click “Edit” to revise existing text or enter new information.

**Refreshing:** As this is a live system, certain content may only appear after a delay, such as updating an application status from "pending" to "submitted." Click the “update available” text, or the Fluxx icon (top left), to refresh the system.

**System Time-Out:** The system times out after **15 minutes of inactivity**. Save early and save often.

**Uploading Documentation:** Please **SAVE** the text information you enter, prior to starting the documentation upload. Upload only one document for each requirement.

**Application Documentation:** As you upload documents, items will move from the ***Documentation*** section to the ***Request Documents***. Prior to submitting the request, ensure all documents are located in the ***Request Documents*** section.

**Notes:** After you click Submit, a Note box will appear. A note is not required. You must **click OK**, even if text has not been entered. **DO NOT CLOSE THIS BOX BY CLICKING THE “X.”**



**Submitted Application:** Once you submit an application and the grant request is “**under review**,” you will no longer see content under the Proposal Overview section. Contact information and submitted documentation will remain visible.

**Approved/Active Grants:** After a grant is approved, the executed grant agreement, grant summary form and CFC approved budget will be added to the Request Documentation section of the active grant.

**Progress/Final Reports Expenditures:** Expenditures will be reported by downloading the CFC approved budget, adding expenditures-to-date, saving the spreadsheet and uploading to the ***Documentation*** section of the Reports form. The CFC approved budget is attached to the Reports documents.

**Contact Information Change Process:** Caring for Colorado Foundation requests that grantee partners notify us when organization, executive director and/or primary contact information changes. Please complete the [Contact Change Form](#) and email it to [info@caringforcolorado.org](mailto:info@caringforcolorado.org). We will also ask partners to review contact information when submitting applications and reports.