



## Foundant Application Tutorial

Foundant Technologies is a private company that works exclusively in making philanthropy easier. Foundant uses cloud-based solutions and focuses on grantmaker, grantseeker, scholarship provider and community foundation needs with the goal to make day-to-day tasks streamlined to help maximize the impact of the philanthropic community. The Native American Agriculture Fund (NAAF) uses this company as its software provider.

*What internet browser should applicants use while using Foundant (NAAF's Grant Portal)?*

- [Google Chrome](#) 14 or higher
- [Safari](#) 4 or higher.
- You may use Internet Explorer or Firefox, but you may experience some technical issues and we do not recommend them.
- (**NOTE:** At present, users of Safari 5.1.x may experience some technical issues. You should revert to Safari 5.0 or [upgrade to Safari 6.](#))

### **Tutorial Guide:**

1. How to Create an Account
2. How to Apply
3. Your Dashboard
4. Follow-Up Forms
5. How to Collaborate
6. How to Change Users
7. How to Print Your Application
8. The Copy Process Feature

### **Video Tutorial 1: Site Access & Account Creation**

<https://drive.google.com/file/d/1O2-rkkxy9iQ1WLx2LKaBYr9LgFoXfaqt/view>

#### **1. CREATE NEW ACCOUNT:**

- Creating a new account is a multi-step process ...
  - One: Collect **Organization Information**
  - Second: Collect **User Information**
  - Three: Collect **Executive Officer 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 their browser's **“back”** button you will lose all registration information entered.
- In the next section you indicate if you are the Organization's Executive Officer.

If you are the executive officer, 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 officer, select **“No,”** and complete the required Executive Officer fields.
- Once the executive officer's information is entered, click on the **“Next”** button to create a password.
- Password requirements are listed at the top of the section, so the applicant can create their password accordingly.

Once the password is created, the applicant clicks the **“Create Account”** button.

**Logon Page**

Email Address\*

The Email Address\* field is required.

Password\*

The Password\* field is required.

Log On Create New Account

Forgot your Password?

Welcome to the Native American Agriculture Fund's Online Grant Portal:

**New Users:** Please "Create New Account" to complete the registration process and create your logon credentials. Completing this step will enable you to enter the application site and begin your application.

**Existing Users:** If you have already created an account, please enter your credentials and log in. If you forgot your password, please use the "forgot your password" link to the left to reset your password.

**Not Sure?** If you think that you or someone within your organization or tribe may have already registered in the system, do not create a new account. Please contact [grants@nativeamericanagriculturefund.org](mailto:grants@nativeamericanagriculturefund.org) to confirm the correct login information and receive your username and password.

**Before you create an account be sure to review the following documents on our website:**

- The Trust Agreement
- The Application Instructions
- The full Request for Funding Application Questions

## EMAIL CONFIRMATION:

Upon clicking Create Account button, 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, and remember, this is an account that you will use for both present and future applications.

## **VIDEO Tutorial 2: Applying for Funding**

<https://drive.google.com/file/d/1cmTa7Hmacg4pqJpn5Xo92vp3RzRxfoeS/view>

## **2. 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.

- If you’ve been provided an access code, you may enter it in the upper right-hand corner to reveal the opportunity you have been invited to apply to.
- 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. Depending on the Foundation the form will likely be an LOI or Application. In this example, you are taken directly into the application.

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 the Foundation allows applicants to update organization information you will see the edit icon next to the Organization Information.
  - If not, you must contact the Foundation directly to change organization information.
- If you’d like a PDF copy of the application, you can click the Question List button.
  - NAAF’s application uses branching logic, so some of the questions shown in the Question List may not apply to you. See NAAF’s website ([www.nativeamericanagriculturefund.org/grants](http://www.nativeamericanagriculturefund.org/grants)) for more information.
- 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 if the form has a specific deadline it will be listed at the top of the form.
  - Depending on the Foundation you may or may not be able to submit after the deadline has passed.
    - If the past due message is reflected in orange, you may still submit the form.

- If the past due message is reflected in red, you no longer have the option to submit the form.
  - If you are not allowed to submit, you will receive a message should you attempt to submit.
  - **NAAF will not accept applications after the deadline.**

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 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, either an LOI or Application, 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, once an application has been submitted you can no longer edit it.

### Required Uploads:

To assist you in preparing your application please be prepared to provide the following documents in your application prior to submission.

**Checklist**

You may use this area to check off items as you complete the application to track your progress.

- Eligibility information
- Fiscal sponsor information (if applicable)
- Limited waiver acknowledgement (if applicable)
- Geographic information
- Native agriculture focus
- Access to capital
- Financial information
- Project proposal for each category
- COVID-19 response (if applicable)
- Intermediary funds information (if applicable)
- Governing body information
- Cover letter
- Support letters (optional)
- Extra space (optional)

### Video Tutorial 3: Your Applicant Dashboard

<https://vimeo.com/user38479606/review/218825690/21ea160857>

### 3. Your Applicant Dashboard

The Dashboard is the is the landing page for any user logging into the site. Underneath their contact information applicants will see two tabs, *Historical Requests* and *Active Requests*. Note: Historical requests will only become “historical” once they have been fully completed and closed (i.e., you have submitted your final report and all funding has been transferred).

**Applicant Dashboard**

Public Profile

**Applicant:**  
 Mrs. Elder Good Saver  
 [Redacted]  
 555-555-5555  
 1234 Seed Saver Ave  
 [Redacted]

**Organization:**  
 Tribal Seed Saver  
 44-4444444  
 555-555-5555  
 1234 Seed Saver Ave  
 Spokane, WA 99205 USA

Contact Email History

If your organization information does not appear correct, please click the edit (pencil) icon.

Active Requests 1 | Historical Requests 0

Save Tribal Seeds

**Process:** Example Process

LOI	Submitted	05/07/2019	<a href="#">View LOI</a>
Decision	Undecided		

- You may continue working on saved forms by clicking the “Edit” option next to the form.
- You may view forms that have been submitted but note that once submitted you cannot edit them.
- You can also see the request’s decision status.
  - The status will be “Undecided” until the site administrator posts a decision.
    - Timing on decision status updates vary depending on the foundation.

If your request is approved, you may be assigned Follow Up Forms to be completed and submitted through the system.

- Follow Ups are completed and submitted just like any other form.
- If you’ve been assigned multiple follow up forms, you must complete them sequentially by due date.
- Follow ups that are past due will be marked as such.
  - If the past due message is reflected in orange, you may still submit the form.

#### 4. Follow Up Forms

*Follow-Up Forms* – are assigned to awardees after the requests have been approved in the system (all awardees receive notice via email regarding their approval or denial for each fiscal year). These forms are used to capture information NAAF would like to get back from our awardees. It is our main form of communication regarding grant awards and project progress.

Follow up forms can be assigned to any contact belonging your awarded organization as long as that contact has the applicant role and password. You can also use the Collaborator tool to add individuals to assist in completing any of the following forms.

*Examples: Grant Agreements, Progress Reports, Modification Request and Final Reports*

## Video Tutorial 4: Collaborator Feature tool

[https://drive.google.com/file/d/1IHkAEvTD4c-t9BwclYQY\\_OCdghW5U56B/view](https://drive.google.com/file/d/1IHkAEvTD4c-t9BwclYQY_OCdghW5U56B/view)

### 5. Collaborator Feature Tool

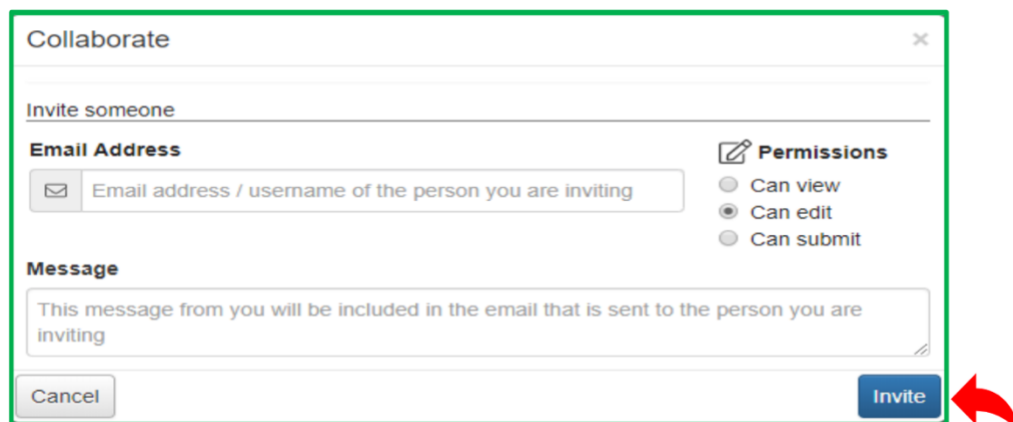
The Collaborator feature can be used to add a new user to your organization without contacting the site's grant administrator ([grants@nativeamericanagriculturefund.org](mailto:grants@nativeamericanagriculturefund.org)). This tool is incredibly useful during these times; it allows applicants to work together, add, edit or submit applications while working remote. If for instance you traditionally work with multiple offices within your organization/Tribe/University, to complete grants and now you are working remote, you can simply send a collaborate request and ask that individual to contribute to your application or follow up form.

*Example:* Grant manager drafts the application narrative, but the finance director will enter budget data.

Click the blue collaborate button



1. From any existing or new request (including follow up forms), select the **Collaborate** button at the top of a form.
2. From the **Collaborate** pop up, enter the email address of the person you would like to invite to your organization.
3. Select the "Can view," permission level, or you can add them with permission to edit or submit depending on the authority you would like them to have.
4. Type a message to the new contact, including the instructions below, and select **Invite**.



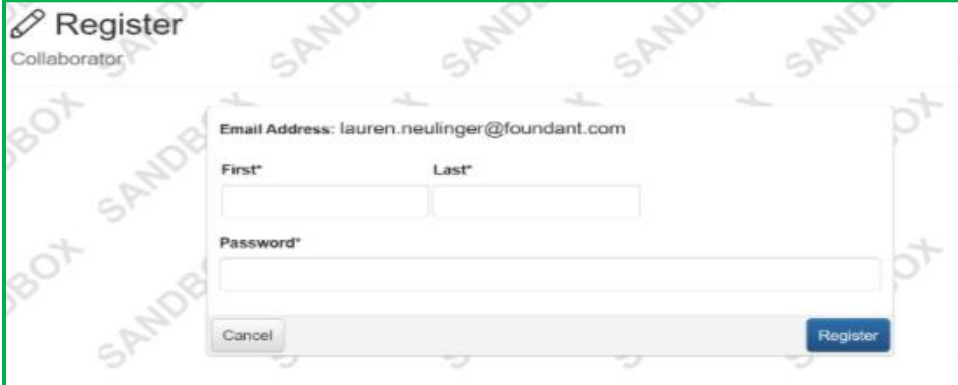
After you click invite, an email will be sent to the collaborator containing your message, their username, and a link to the logon page. After clicking this link the collaborator will be brought to the logon page. If this is their first-time logging into the system, they will be asked to create a password.

Sample Email Message you can add in the text box:

“Please register as a contact with our organization following the steps below.”

1. Click the link below, enter your name and a new password, and then select the **Register** button.
2. At the top of the dashboard, click **Apply**.
3. Click **Complete Registration**.
4. Click into the Organization dropdown box and select our organization.
5. Complete the additional required fields and click **Save**.

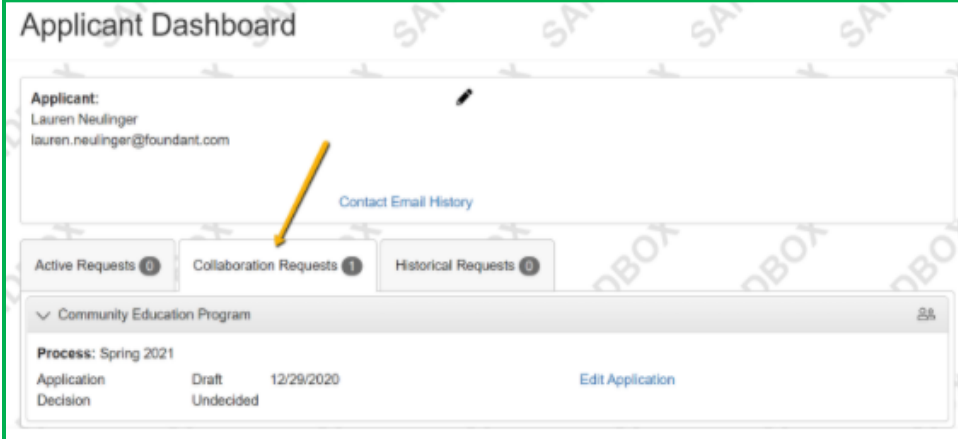
You have now been added as a contact and can log in using your email address and password.



The screenshot shows a 'Register' form for a collaborator. The form is titled 'Register Collaborator' and includes the following fields: 'Email Address' (pre-filled with 'lauren.neulinger@foundant.com'), 'First\*' (empty), 'Last\*' (empty), and 'Password\*' (empty). There are 'Cancel' and 'Register' buttons at the bottom.

After logging into the system, the collaborator will see this request under the Collaboration Requests tab of their Applicant Dashboard. Here they can select the edit form link and start collaborating on the document.

- The Collaborator will have access to all forms within the request.
- This includes Applications, and all Follow Up Forms that have been assigned to the original applicant.



The screenshot shows the 'Applicant Dashboard' for Lauren Neulinger. The dashboard includes a 'Contact Email History' link, three tabs: 'Active Requests' (0), 'Collaboration Requests' (1), and 'Historical Requests' (0). A yellow arrow points to the 'Collaboration Requests' tab. Below the tabs, there is a section for 'Community Education Program' with a dropdown arrow and a search icon. The 'Process' is 'Spring 2021'. The 'Application' status is 'Draft' with a date of '12/29/2020' and an 'Edit Application' link. The 'Decision' status is 'Undecided'.



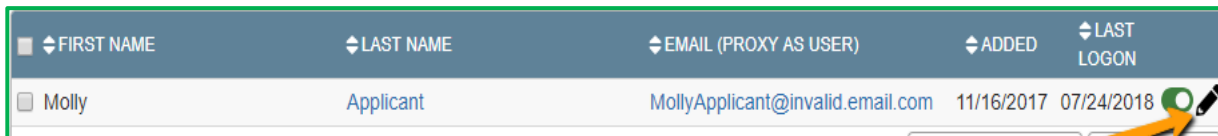
## 6. Changing Applicant Users

The first person to register enters the organization's information, which creates the organization profile. It's important to enter this information accurately at registration, because after this point the organization profile can only be edited by NAAF Staff.

For an organization to easily view its full history of grants and requests, we recommend consolidating all applications into one user account. If you are unsure whether your organization already has an account or if you need to be added to an existing account, please contact [grants@nativeamericanagriculturefund.org](mailto:grants@nativeamericanagriculturefund.org) or your POC to discuss your options. (Additional users can be added by NAAF Staff or the person who set up the account).

*Also note:* The person who sets up this account and uses their email address will become the main point of contact that we use to communicate through our online grant portal, so make sure this person is available and checks their email often. Why is this important? Because this person will be responsible for sharing any data communicated through Foundant to the members of your organization or entity.

Individuals can edit their user information by Clicking on the **Edit Icon** to the right of the user you want to edit.



FIRST NAME	LAST NAME	EMAIL (PROXY AS USER)	ADDED	LAST LOGON
Molly	Applicant	MollyApplicant@invalid.email.com	11/16/2017	07/24/2018

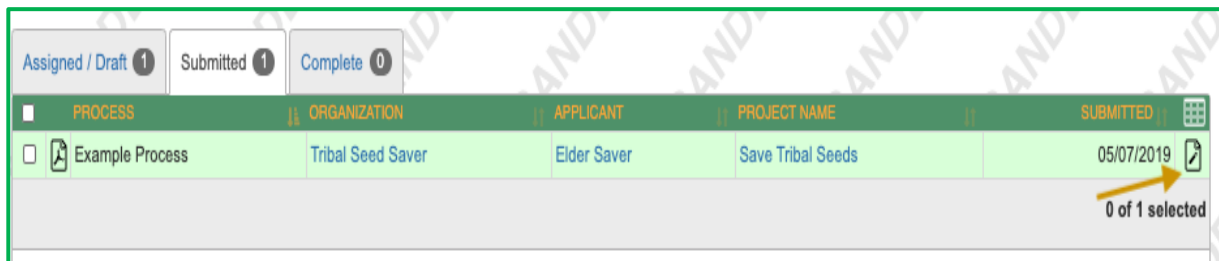
The screenshot shows a table with five columns: FIRST NAME, LAST NAME, EMAIL (PROXY AS USER), ADDED, and LAST LOGON. The first row contains the data: Molly, Applicant, MollyApplicant@invalid.email.com, 11/16/2017, and 07/24/2018. To the right of the last logon date, there is a green circular icon containing a pencil, which is the edit icon.

Update the user information.

- If the user's profile is missing information in required fields these fields must be completed before saving.
- Click on Save to finalize your changes.

## 7. Printing Your Application

In order to print your application, you can click on the paper icon with the pencil inside. The document will automatically download to your desktop.

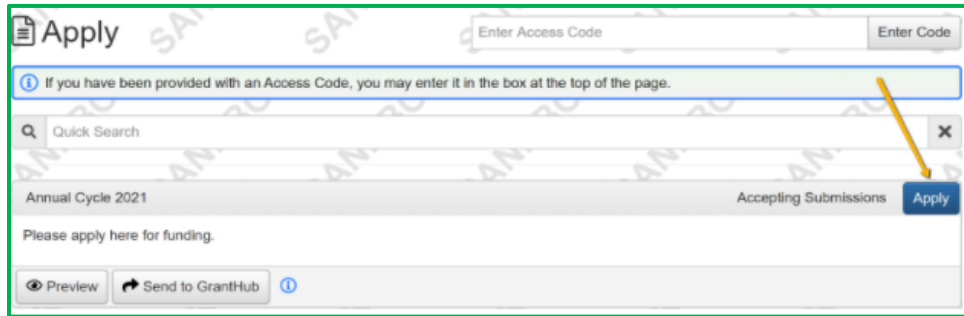


PROCESS	ORGANIZATION	APPLICANT	PROJECT NAME	SUBMITTED
Example Process	Tribal Seed Saver	Elder Saver	Save Tribal Seeds	05/07/2019

The screenshot shows a table with five columns: PROCESS, ORGANIZATION, APPLICANT, PROJECT NAME, and SUBMITTED. The first row contains the data: Example Process, Tribal Seed Saver, Elder Saver, Save Tribal Seeds, and 05/07/2019. To the right of the submitted date, there is a paper icon with a pencil inside, which is the print icon. An orange arrow points to this icon. Below the table, it says "0 of 1 selected".

## 8. Copy Request Feature

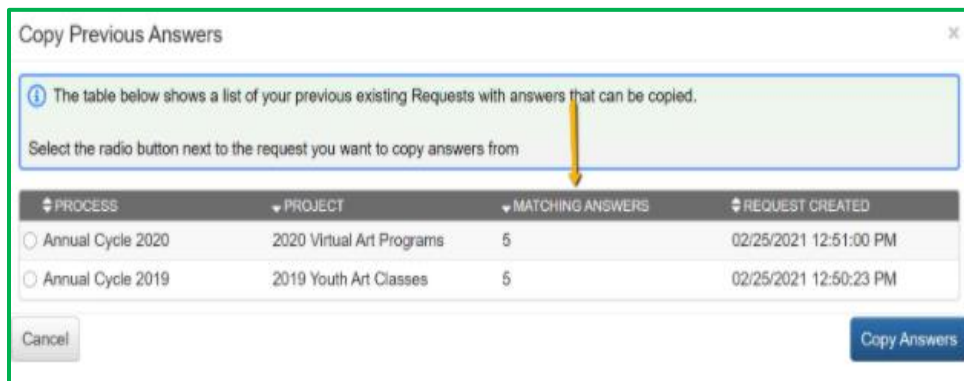
Log into your site, then click **Apply** in the upper navigation bar.



Click **Copy Previous Answers** to copy your responses from a previous request into this form.

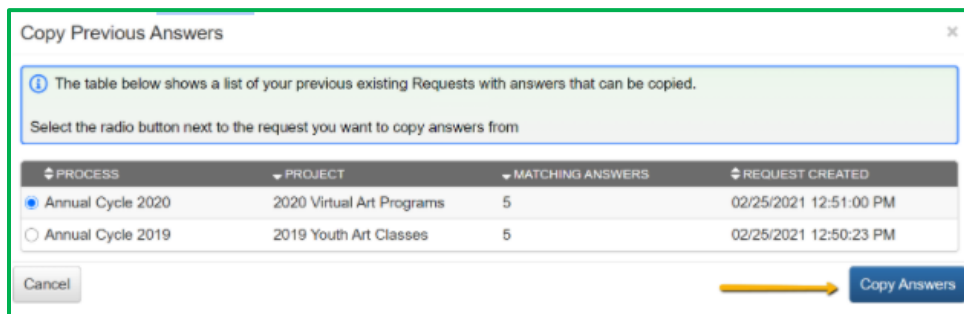


The pop-up shows your previous requests with this funder that could be copied, and the number of matching answers that will copy into your request for this funding opportunity.



Select the request you want to copy responses from, then click **Copy Answers**.

- If you've started filling out this form already, this will not overwrite or affect your new responses.



Click **OK** on the message that appears next, confirming that you want to copy answers into this new request.

- The matching answers from your previous request will then automatically populate in this form for your new request.
- Be sure to review the responses and update them as needed.
- Check for any additional questions on the form that did not populate with copied responses.
- Click **Save** at the bottom of the form if you need to continue working on it later. Click **Submit** when you're ready to submit your request to the funder.

