

# Nelson Foundation Online Application System Instructions

## Registration and Log-In

**Returning users**, log on to the system using your e-mail address and the password. Please do not create a second, new user account. There is a system prompt to assist if you need a password reminder. If you are unsure if an account was previously created for your organization, please contact The Nelson Foundation staff.

**New users** must first register by clicking "Create New Account" on the Log In page. Before creating an account, please be sure that an account was not created previously.

## The Registration Process

The registration process has four sections: (1) organization information, (2) your individual user information, (3) executive officer information, and (4) choosing your individual user password. The registration process is straightforward; however, in some cases, it may be more complex when certain factors apply: Each individual user is linked to a single organization. If you are submitting applications for different organizations, you will need to register separately using a different email address for each organization.

During the registration process, you cannot save partial information; therefore, you should gather all required information before beginning the registration process.

Your user account ID is your e-mail address.

## Updating Your Registration Information

To update your user information, click on your name at the top right corner of the screen and select "Edit Profile" from the drop-down menu. You may need to contact Foundation staff to update some personnel contact information.

## The Application Page

After you have registered you will be directed to the Application Page. On the top the screen you will see:

- Home button (  )– This screen is your applicant dashboard and lists all grants and applications with associated forms and documents.
- Apply – (Application Page) lists the available grants and is the portal to apply. This is also where you will find current deadline information.
- Organization History – Summarizes contact, application, and grant information

## Navigating the Online Grant Management System

- Apply for a grant by clicking "Apply" in the menu at the top of the screen.
- Manage your grant application by clicking the home button (  ) in the menu at the top of the screen. This Applicant Dashboard provides information regarding the status of grant applications and awards, including required follow up forms, such as grant award agreements, interim reports, or final reports for awarded grants.

- View a summary of your organization’s grants and applications, as well as user contact information by clicking the “Organization History” button at the top of the page.

## **Uploading Files**

- In general, the acceptable file types for uploading files are: Microsoft Word/Excel and Adobe PDF (PDF) files.
- Only one file can be uploaded per question. Multiple documents must be combined into one file and then uploaded.
- If the document(s) that need to be attached to your form are not electronic or you need to combine multiple documents into a single file, our online system gives you the option to “Fax to File.” The easy-to-use tool will convert documents from hard copy to digital format as a PDF file. Instructions are below:
  1. Click “Fax to File” in the menu at the top of the screen and read the instructions.
  2. Select “Request a Fax #”; a toll-free number will appear on the page.
  3. Load a document, or multiple documents that need to be consolidated into one file, into your fax machine.
  4. Dial the toll-free number. Send a separate fax for each individual file you wish to create.
  5. Select “Finished Faxing” when you are done and to see your list of files

## **Online System Tips**

### **Things to Know**

1. The character counter includes spaces as well as characters.
2. A user will be automatically logged out of the online system after 90 minutes of inactivity. The user will receive a warning message at 80 minutes of the pending time out. Working on a form without saving does not count as activity.
3. Please remember to regularly save your work. The system will auto save every 20 minutes.
4. You may choose to prepare your response in a document outside of the online system (e.g. Microsoft Word) and then copy and paste the text into the online form. If you prepare your application in this way, be sure to keep track of character limits. As noted above, character limits include spaces and characters. We recommend that you do not use formatting tools, as available in Microsoft Word, because the formatting will likely not transfer to the response area when pasted into the online system.
5. It is advisable to download copies of all submitted forms to your computer.
6. If you do not provide an answer for one of the required questions, you will not be able to submit your application.
7. If your PDF upload file exceeds the maximum file size, consider using the Adobe Acrobat option to 'Reduce File Size' (look at the options in Document).
8. Remember to click "Submit Form" when you are finished.
9. Once your application has been submitted it is no longer available for editing. If you need to make a correction to a submitted form, contact Foundation staff.