

## OCF Grants Portal Frequently Asked Questions

For step-by-step instructions on how to use the Grants Portal and apply for a grant, please visit the grant program's web page at [oregoncf.org](http://oregoncf.org) or the sidebar within the Grants Portal.

### Registering as a User

#### 1. How do I register to use the Grants Portal?

You can register by visiting the [MyOCF login page](#). Before registering, please make sure you haven't already created a user account. If you think you have an account and have forgotten your login information, please click **Forgot Password** or contact OCF for help.

#### 2. I didn't get a confirmation email to complete the registration process. What should I do?

Sometimes there is a slight delay with message delivery. Please allow up to 15 minutes. We also recommend that you check your junk email box. If you still can't find the email, please contact OCF at [grants@oregoncf.org](mailto:grants@oregoncf.org).

### Managing My User Account (My Profile)

#### 1. What is My Profile and when should I update the information there?

My Profile is where you maintain your account as an individual user. From here you can change your password and secret question and review your contact information.

My Profile is accessed from the sidebar on the Grants Portal home page. To reach the home page, click on the **Grants Portal** link in the sidebar anywhere in the system.

The address and email listed in My Profile does not necessarily reflect contact information of a specific organization. For organization-specific information, visit the Organization Profile screen.

#### 2. How do I change my user password or secret question?

Your password and secret question can be changed in My Profile. Click on **Change Password** or **Change Secret Question**, update your information and click **Save**.

#### 3. Why can't I update my contact information in My Profile?

Contact information is maintained solely by OCF staff for data integrity purposes. If you have a change to your contact information, please contact OCF at [grants@oregoncf.org](mailto:grants@oregoncf.org).

## Connecting to an Organization

### 1. How do I connect myself to an organization?

From the Grants Portal home page, click **Add Organization**. Use the search to see if your organization already exists in our system. If you can't find your organization, you can create a new organization.

### 2. I can't find my organization when I perform a search. How do I add it?

If your organization has an alternate name (DBA, acronym, etc) please try using that in the search. If you still can't find your organization, click **Create Organization** at the bottom of the screen and follow the instructions.

### 3. What does it mean if my organization is listed as "Pending?"

A "pending" status means we are reviewing your connection to the organization, which may take up to 48 hours over weekends. In most cases, it will take less than one business day.

You may begin an application if the organization is in a status of "pending," but you cannot submit an application until we have completed our review.

### 4. I'm connected to more than one organization. How do I pick the correct organization for my current application?

There are two ways to pick the correct organization:

- 1) From the organization drop-down on the Grants Portal home page.
- 2) When you select the grant program to which you are applying (the first screen to which you are taken when you click "Apply for a Grant").

Please note: once you've started an application, you *cannot switch the organization*. You will have to discontinue your application and start a new one.

## Managing the Organization Profile

### 1. What is the Organization Profile and when should I update the information there?

The Organization Profile shows the organization contact information we have on record as well as the organization's mission statement. You can edit the mission statement at any time by clicking **Edit this Profile**. You cannot change the contact information listed here.

### 2. Why can't I update the organization's contact information in the Organization Profile?

Contact information is maintained solely by OCF staff for data integrity purposes. If you have a change to the organization's contact information, please contact OCF at [grants@oregoncf.org](mailto:grants@oregoncf.org).

## Navigating the Grants Portal

### 1. How do I get back to the Grants Portal home page?

You can access the home page anywhere in the system and at any time by clicking on the **Grants Portal** link in the sidebar.

### 2. How do I apply for a grant once I'm logged into the portal?

You can apply for a grant in one of three ways:

- 1) By clicking on the **Apply for a Grant** button from the Grants Portal home page;
- 2) By clicking **Begin an Application** once you've connected yourself to an organization; or
- 3) By clicking **Apply for a Grant** in the navigation bar anywhere within the Grants Portal (see below).

<a href="#">Apply for a Grant</a>	<a href="#">Application Status &amp; History</a>	<a href="#">Organization Profile</a>
-----------------------------------	--	--------------------------------------

### 3. How do I access applications that are in process or applications that I've already submitted?

Click on the **Application Status & History** link from the navigation bar. The link can be accessed on the Grants Portal home page and throughout the system.

If you're in the middle of working on an application, you can continue your work by finding your application in the My Applications table and clicking **Details**. If you've submitted your application, you can no longer make edits without contacting OCF staff.

### 4. My organization has applied for grants in the past. Why am I not seeing those applications in the Application Status & History screen?

The table on the Application Status & History screen only lists applications your organization has submitted via the Grants Portal. Past applications submitted as hard copies or through other mechanisms are not listed here. For information about past applications not submitted through the Grants Portal, please contact OCF staff.

### 5. What do the different application statuses mean on the Application Status & History screen?

A status of "In Process" means that your application is only partially completed. At this stage you can still edit your proposal.

A status of "Received" means the application has been received by staff, but has not yet been reviewed. Please note that an application may be held in a "Received" status for up to five business days, depending on application volume for particular programs.

A status of "Under Review" means we are actively reviewing your application. At this stage you may receive phone inquiries or requests for more information. A status of "Under Review" can last anywhere between two weeks and several months, depending on the grant program and cycle timeline. If you have questions about the timeline, please visit the grant program's web page at [www.oregoncf.org](http://www.oregoncf.org).

A status of "Declined" means that the OCF board of directors has declined your proposal. You will receive formal notification of this decision. Questions about declines should be directed to the program officer managing that particular grant program.

A status of "Approved" means that the OCF board of directors has approved your proposal. You will receive formal notification of this decision. Approvals can take anywhere between 1-2 weeks to be processed. Questions about approvals should be directed to the program officer managing that particular grant program.

**6. Why can't I see my attached documents when I click "View PDF" on the Applications Status & History screen?**

The **View PDF** function only shows the fields that you've completed on an application via the Grants Portal. To view your attached documents, click **Details**, then click **Upload** in the Required Documents table.

## **Filling out and Submitting an Application**

**1. How much time do I have to work on my application?**

The application window opens anywhere between one and two months before the deadline depending on the program. You have up until 11:59pm PST the day of the deadline to submit your application. After that time the application window will be closed. Please consult grant program web pages and RFPs on [www.oregoncf.org](http://www.oregoncf.org) for application windows and deadlines.

**2. Can I apply for more than one grant program at a time by filling out a single application?**

No. You must start a new application for each grant program.

**3. The system tells me I'm ineligible to apply for a grant. What should I do?**

Based on your answers to pre-qualifying questions, you do not meet our basic criteria for applying for a grant. Please review your answers to the pre-qualifying questions. It's possible that you selected "No" when you meant to select "Yes," in which case you can go back and change your answer(s). If the answer to any question is still "No," you cannot start an application. If you're still unclear about your eligibility, please contact OCF staff.

**4. I have been invited by OCF to reapply for year two or year three of my project. Is there a different format that I need to use to submit my renewal application?**

No. The application format is the same. If the grant program to which you are applying allows for renewal applications, you will be prompted to answer renewal related questions. The Community Grants Program, for instance, will ask you in the narrative portion of the application if you are a renewal applicant; if the answer is "Yes" the questions will adjust accordingly.

**5. How do I know if I'm a renewal applicant?**

Please review the original award letter you received with your year one grant. If you've been invited to reapply for year two or three of the project, the award letter will state it. *Please note: not all grant programs provide multi-year funding. We encourage applicants to review program guidelines on our [website](#) and to contact staff with any questions.*

**6. I have a multi-year project for which I'm requesting funding, but the project budget revenues and expenses (sections 5 and 6) only ask for a single year of budgeted revenues/expenses. Where can I share information about subsequent years of budgeted revenues/expenses?**

You can upload a multi-year project as part of section 8 of the application (Required Documents table on the Application Dashboard).

**7. What is the Application Dashboard?**

The Application Dashboard is the main screen you access to fill out an application and upload required documents.

**8. How do I get back to the Application Dashboard when I'm in the middle of an application?**

You can get back to the Application Dashboard one of two ways:

1. Click the **Check Work & Exit** button at the bottom of each page of the application. Please note: if you click on this button you *must complete all required fields* on the page before the system will take you back to the Application Dashboard.
2. Click the navigation buttons (<< or >>) at the bottom of each page of the application. You will be taken to the Application Dashboard when you're either at the beginning or end of the application. The << and >> buttons do not require all fields to be complete on each screen.

**9. Do I need to fill out application sections in sequential order?**

No. You can begin any section you wish, including uploading required documents.

**10. I'm not sure how to answer certain questions on the application. Where can I get help?**

We encourage you to visit the grant program web page, RFP and application guidelines for more information. If you still have questions, please contact OCF staff.

**11. How do I upload a required document?**

Go to the Application Dashboard and review the list of required documents in the Required Documents table. Click **Upload** and follow the instructions on the following screen.

**12. Why is there no "Save" button on the application?**

The system auto-saves your answers every few seconds. You will always be able to retrieve your latest work.

**13. Why am I not getting a green checkmark when a section is complete?**

A section is not considered complete until you've clicked the **Check Work & Continue** or the **Check Work & Exit** button on each page of the application. By clicking one of these two buttons, the system is checking for completion of each required field on the page.

*Please scan the whole page.* If any blank field is highlighted in red, you must enter information there. When you've added information, you must once again click one of the "Check Work" buttons to validate the page.

A green check mark will appear next to the section on the Application Dashboard when your work has been validated.

**14. How do I review and submit my completed application?**

You can review your application at any time by clicking the **Preview Application as PDF** button on the Application Dashboard.

In order to submit your application, you must complete all sections and attach all required documents. You will know this is the case when:

1. Sections 1-7 have received a green check mark
2. All required documents have a status of "Completed"
3. The Review and Submit button is visible on the Application Dashboard

- ✔ Section 1: Organization Contact Information
- ✔ Section 2: Organization Mission & Structure
- ✔ Section 3: Organization Financials
- ✔ Section 4: Project Contact & Overview
- ✔ Section 5: Project Budget Revenue
- ✔ Section 6: Project Budget Expenses
- ✔ Section 7: Project Narrative Questions

Preview Application as PDF

Review & Submit

When you click **Review and Submit**, you will be taken to one more screen where you will sign and submit your application. You still have the opportunity to go back and edit your application by clicking **Return to Application Dashboard**.

When you are ready to submit, you must certify that you meet OCF's policies for submitting an application. You will not be able to submit an application until every box is checked and your signature and date are entered.

#### **15. I've submitted an application and I need to make changes. What should I do?**

You cannot make changes to an application that is submitted and in a status of "Received" or "Under Review." If after reviewing your submitted application you discover that important information is presented inaccurately (e.g., project budget information, outdated financials, etc.) please contact OCF staff.