

## **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 application guidelines on the web page at [oregoncf.org](http://oregoncf.org) .

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## REGISTERING AS A NEW 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** and follow the instructions.

### 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).

## LOGIN, PASSWORD & SECRET QUESTIONS

### 1. I forgot my password. How do I log in?

Click **Forgot Password** from the main login screen. You will be asked to enter your email twice, once as your User ID, and a second time for verification. Click the **Send Password Email** button. You will be sent an email with a link to update your password. You will need to have the answer to your Secret Question (security question) available. *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.*

### 2. I forgot my User ID. What should I do?

Your User ID is the email with which you registered your account. If you've forgotten which address that is, please be sure to try all the email addresses you're currently using.

It's also possible that the account is under a colleague's email address, either because they set it up initially or your organization opted to set up a single user account for your organization. Please consult your and your organization's records before contacting OCF for assistance.

### 3. I forgot my password and followed the instructions to receive a new one. However, it's asking for the answer to my Secret Question, which I don't remember. What should I do?

You will need to contact OCF at [grants@oregoncf.org](mailto:grants@oregoncf.org) to reset your password and secret question.

## 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 ONLY edit the mission statement from this screen. 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. You can also access it from the **Grants Portal** tab at the top of each screen.

### 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 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>
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### 3. How do I access applications that are in progress?

You can access an application in progress in one of two ways:

- 1) By clicking **Continue Application in Progress** button from the Grants Portal home page; or
- 2) By clicking the **Application Status & History** link in the navigation bar anywhere within the Grants Portal.

You can continue your work by finding your application in the My Applications table and clicking **Details**.

### 4. How do I access an application that I've already submitted?

Click the **Application Status & History** link in the navigation bar and find your application in the My Applications table.

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

“In Process” means that your application is only partially completed. At this stage you can still edit your application.

“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. At this stage you cannot edit your application.

“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).

“Declined” means that the OCF board of directors has declined your application. You will receive formal notification of this decision. Questions about declines should be directed to the program officer(s) managing that particular grant program.

“Approved” means that the OCF board of directors has approved your application. 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(s) managing that particular grant program.

**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 in Section 7.

**5. How do I know if I'm eligible to reapply for funding for year two or three of my multi-year project?**

Please review the award letter you received with your original grant. If you've been invited to reapply for year two or three of the project, the award letter will state it.

**6. I have a multi-year project for which I'm requesting funding, but Sections 5 and 6 of the application only ask for a single year of budgeted revenues and expenditures. Where can I share information about subsequent years of budgeted revenues and expenditures?**

You will upload a project budget that contains multi-year figures 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. It is also the place where you will review and submit your application when it's complete.

**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 by clicking **Return to Dashboard** at the bottom of any screen in the application.

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

No, you can begin any section you wish, including uploading required documents. Just make sure that you've saved your work on each screen by clicking **Save Work on Current Page**.

**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. Grant Program web pages will also include step-by-step instructions and a list of the online application questions for guidance. If you still have questions, please direct them to the program officer(s) managing that particular grant program.

**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. *Please note that some file types are may not render (see next question).*

**12. Which file types are acceptable for uploading?**

**Allowed:** PDF, Word (DOC, DOCX) and image (JPEG)

**PROBLEMATIC:** Excel (XCL, XCLX) *TIP: If you have an Excel document, we recommend converting it to a PDF file before uploading.*

**NOT ALLOWED:** .pages, .pub, .odt, .txt, Excel (XCL, XCLX)

*TIP: If you have an Excel document, we recommend converting it to a PDF file before uploading.*

### 13. How do I save my work?

Click **Save Work on Current Page** at the bottom of each screen in the application.

### 14. Why am I not getting a green checkmark when it seems that the section is complete?

You have not fully completed the section. Any fields in **bold** are required fields. Please thoroughly check each screen.

### 15. Why can't I see my attached documents when I preview the PDF?

The PDF does not display any attachments that you've uploaded. It only includes the fields you've entered as part of your application. To view your attached documents, click **Details**, then click **Upload** in the Required Documents table.

### 16. How do I submit my completed application?

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 (Section 8) 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" (i.e. your name) and date are entered.

### 17. 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) please contact OCF staff.

## **Organization Financials Guidance**

### **1. I'm working on Section 3: Organization Financials. What do you mean by “Current Year Budget?”**

Current Year Budget refers to your organization’s board-approved budget for the year in which you are currently operating (either a fiscal year or calendar year).

### **2. What do you mean by “Current Year Actuals To-Date?”**

Current Year Actuals To-Date refers to all incoming revenue and outgoing expenditures applied toward your board-approved budget thus far.

For instance, let’s say your Current Year Budget is \$250,000 and you’re operating on a calendar year (1/1/2016 to 12/31/2016). You’re applying for a grant in July 2016. Your Current Year Actuals To-Date should represent a portion of the \$250,000, assuming you haven’t spent down your entire budget halfway through the year!

If the year has just turned and you do not have your final numbers, please submit the most recent actuals. You may email the up to date budget to staff after the application has closed to be attached to your application.

### **3. What do you mean by “Previous Year Actuals?”**

Previous Year refers to your organization’s previous fiscal or calendar year. Actuals refers to the total confirmed incoming revenue and outgoing expenditures within that period.

### **4. What do you mean by “Operating Surplus/Deficit?” How should I fill this out?**

Subtract your expenditures from your revenues in each column and enter that total.

If it’s a positive figure, that’s your surplus. If it’s a negative figure, that’s your deficit. Use a minus sign (-) before the amount to indicate that it’s a deficit. When you save, the figure will be in parentheses.

Financials for last year and this year:

	CURRENT YEAR BUDGET	CURRENT YEAR ACTUALS TO DATE	PREVIOUS YEAR ACTUALS	
Organization Revenues	\$250,000.00	\$225,000.00	\$220,000.00	<a href="#">Edit</a>
Organization Expenditures	\$250,000.00	\$210,000.00	\$240,000.00	<a href="#">Edit</a>
Operating Surplus/Deficit	\$0.00	\$15,000.00	(\$20,000.00)	<a href="#">Edit</a>

## Technical Assistance

### 1. When are staff available to answer questions?

OCF staff are available Monday through Friday, 9:00am – 5pm, to answer your questions.

If the application deadline falls on a weekend or a holiday, staff will occasionally be monitoring email, but may not have a chance to respond until they're back in the office.

*Please consider starting your application during the work week, even if you intend to submit it during out-of-office hours.*

### 2. I'm experiencing system slowness. What do I do?

The system can get overloaded at the deadline as there is a higher volume of applicants accessing the application all at once. If you experience any system slowness, please be patient and try again. If the problem persists, contact OCF staff at [grants@oregoncf.org](mailto:grants@oregoncf.org). Please explain the specific issue you are having (and on what date and time), as this helps us communicate the issue to our database provider.

### 3. I'm having trouble completing and/or submitting my application due to system performance issues. What do I do?

If you can, please try to save your work and log out of the Grants Portal. If after logging back in and you're still experiencing issues, please send us an email at [gransts@oregoncf.org](mailto:gransts@oregoncf.org) and we will work with you to get it resolved.

### 4. Technical issues have prevented me from submitting my application by the deadline. What do I do?

If you make multiple attempts to submit your application before the deadline, but experience technical difficulties in doing so, we will accept a late submission.

Please send us an email at [grants@oregoncf.org](mailto:grants@oregoncf.org) explaining the situation and we will work with you when we return to the office to get it resolved.

*Please note: applications must be started in the system **before the deadline** to be considered for late submission.*

**5. I'm having login and password issues. How do I fix it?**

Please refer to Section X, **Login, Password & Secret Questions** in this document.