Table of Contents

Introduction..................................................................................................................................................2
Signing into Foundant for the First Time ..................................................................................................2
  Resetting the Password ..........................................................................................................................2
  Previous Applicants ...............................................................................................................................3
  New Applicants .....................................................................................................................................3
Understanding Your Dashboard ............................................................................................................3
  Editing Your Contact Information .......................................................................................................3
Applicant Active and Historical Requests .............................................................................................4
  Active Requests ....................................................................................................................................4
  Historical Requests ..............................................................................................................................5
Organization History ..................................................................................................................................5
  Organization Info .................................................................................................................................5
  Request History .....................................................................................................................................5
  Contacts ................................................................................................................................................6
  Documents ............................................................................................................................................6
Applying for a Grant ..................................................................................................................................6
  Preview ..................................................................................................................................................7
  Send to GrantHub ................................................................................................................................8
Collaboration .............................................................................................................................................8
Introduction

Beginning in 2020, The Champlin Foundation will transition to using an application portal hosted by Foundant Technologies, Inc. This transition will allow all applications to be completed entirely online, meaning the Foundation will no longer accept grant requests by mail or email. This document is intended to provide a step-by-step guide to applicants on how to access and navigate the portal, review their organization’s grant history, apply for a grant, and check on the status of their request.

Your main point of contact for using Foundant is:

Heather Fraser
Grants Management Associate
401-944-9200 x115
hfraser@champlinfoundation.org

Please contact Heather with any questions or concerns utilizing the online portal. You can also schedule a demonstration or system assistance with Heather here. A available dates will be highlighted in blue. Simply click on an available date, choose your desired time, and hit confirm.

Signing into Foundant for the First Time

Resetting the Password

Open the Foundant logon page here: https://www.grantinterface.com/Home/Logon?urlkey=champlin
Previous Applicants
Every organization that has applied for a grant from The Champlin Foundation between 2009 and 2019 has been entered into the system along with an identified contact person. If you have been receiving emails from The Champlin Foundation over the past year, you can move forward with your registration into the online portal by selecting the Forgot your Password link.

Please remember to use the email address to which we have been sending correspondence. This is your unique identifier in the system. If you try to reset your password and receive a message that the system does not recognize you, please contact Heather Fraser to troubleshoot.

New Applicants
If your organization has not applied for a grant from The Champlin Foundation in the last 10 years, or if you have not been receiving our emails, please contact Heather Fraser to receive your credentials. To be added into the system, you must provide the following: Organization Name; Organization Tax ID; User First and Last Name; User Business Title; User Phone and Email Address.

TIP: If you are unsure if your organization has applied in the past, or if you don’t know whether you are set up as a user, please do not hesitate to contact Heather Fraser to ask.

Understanding Your Dashboard

Editing Your Contact Information

The first thing you will see when you log on is your Applicant Dashboard. We recommend reviewing both the Applicant and the Organization information prior to navigating further. If you notice information that needs to be updated, you can do so by clicking the pencil icons.

You will notice that you do not have permission to change the name of the Organization you are applying for. If you find that this information is inaccurate, please email Heather Fraser with your corrections.
Applicant Active and Historical Requests

The tab below your contact information will show you your Active and Historical Requests. This will provide you with a snapshot of the applications you have submitted on behalf of the organization.

![Contact Information]

Active Requests
A request that is considered “active” is one that:

a) Is in draft form prior to applicant submission
b) Is pending a decision from The Champlin Foundation
c) Has been awarded but the organization has yet to fully spend the funds and/or submit a final Use of Funds report to The Champlin Foundation

![Request Status]

Each request can be expanded to see the details. In the example below, Mr. Schrute has 2 active requests. One has been approved and the other has been submitted and is awaiting a decision from the Foundation.
Furthermore, each request will show you any documents related to the grant award and any follow ups that have been assigned. Here, you can see that the Foundation (Administrator) has shared a 2020 Grant Agreement and that Mr. Schrute has a Use of Funds report (Follow Up Forms) that is pending submission by 12/31/20.

TIP: Note that the Active and Historical Request tabs, as well as the assigned follow-ups, are unique to each user. For instructions on how to allow more than one person to work on an application or a follow-up, please refer to the Collaboration section later in this document.

Historical Requests
Please do not invest time in this section. While we hope this tab will become more relevant as we move forward, individual applicant data has not been attached to grant submissions prior to 2019. For a more complete picture of your organization’s grant history, please refer to the Organization History section as described below.

Organization History
Selecting Organization History at the top of the page will open your complete Organization Summary. From here, you can access your Organization Information; Request History; Contacts; and Documents.

Organization Info
This is the basic organizational information we have on file. You can update this information by selecting the Edit button in the bottom right corner of the box.

Request History
This is the request history for your organization. Here you can see the grant status and the amount of any grants awarded. The grant statuses are as follows:
There are two important notes you should be aware of when reviewing your organization’s request history:

1. The grant history from 2009 on will show you those applications that were denied as well as the ones that were approved. The grant history prior to 2009 will only show you those applications that were approved.

2. You may notice that some of the project names are listed as numbers. We are in the process of converting these to project names but please be patient with us. This project includes thousands of records and will take some time to complete. To view the details of the request, simply click on the highlighted link and then on the paper and pencil icon.

Contacts
This list will show you all employees that currently have access to log into Foundant on behalf of the organization. Users only have permissions to edit their own information. If you notice that another user’s information is incorrect, or if you see a user listed that is no longer working for the organization, please contact Heather Fraser with your requested changes.

<table>
<thead>
<tr>
<th>NAME</th>
<th>TITLE</th>
<th>EMAIL (PROXY AS USER)</th>
<th>PHONE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Michael Scott</td>
<td>Executive Director</td>
<td><a href="mailto:mscott@dundermifflin.org">mscott@dundermifflin.org</a></td>
<td>401-555-1010</td>
</tr>
<tr>
<td>Dwight Schrute</td>
<td>Assistant to the Regional Manager</td>
<td><a href="mailto:dschrute@dundermifflin.org">dschrute@dundermifflin.org</a></td>
<td>401-555-1000</td>
</tr>
<tr>
<td>Pam Beasley</td>
<td>Administrative Assistant</td>
<td><a href="mailto:pbeasley@dundermifflin.org">pbeasley@dundermifflin.org</a></td>
<td>401-555-5555</td>
</tr>
</tbody>
</table>

Documents
The documents tab houses any documents that The Champlin Foundation has uploaded for your review. This information is visible to all users and is where application specific Grant Agreements can be found.

Applying for a Grant
You can apply for a grant by clicking the Apply link located at the top of the page. If you click on this prior to an application cycle opening or after an application cycle has closed, you will be directed to a blank page. Clicking on this link within an application cycle, however, will direct you a page that contains the Apply links for any grant programs that are accepting applications.

The most important thing to do once you arrive at this screen is to be sure you are completing the correct application for your organization. In 2020, there will be three unique applications for:
1. Traditional Grant Requests
2. Houses of Worship
3. Traditional Public Middle Schools and Junior High Schools

Be sure to familiarize yourself with the criteria for your designated application by checking out The Champlin Foundation’s website.

**NEWS:** The Champlin Foundation is currently redesigning our website with a scheduled launch date of March 1, 2020. We hope you will take a moment to check it out and let us know what you think!

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**Preview**

The preview button is a helpful tool that will allow you to view the form application in its entirety prior to opening an application. Once in preview mode, you can print out a PDF of the question list using the button located in the top right-hand corner of the screen.
Send to GrantHub

Please note that GrantHub is a licensed product of Foundant Technologies, Inc. and is not affiliated with The Champlin Foundation in any way. If your organization is interested in learning about GrantHub, please reach out to Foundant directly. You do not need to purchase GrantHub in order to apply for a grant.

Collaboration

Each grant request is attached to only one user. This is automatically the person who began the application by hitting the Apply button as discussed above. Whoever begins an active application from your organization becomes the point person for all communications and all assigned follow-ups, including Grant Agreements and Use of Funds reporting. They become the primary applicant for that application. As the system is not capable of Cc’ing or Bcc’ing individuals on a case-by-case basis, it is the primary applicant’s responsibility to share communications with the rest of their team as needed.

You can, however, open an application for collaboration and allow additional team members to view, edit and/or submit forms on the organization’s behalf. Do this by using the Collaborate button found within the Application form.

TIP: You may want to use this function if you are working with an independent grant writer. All communications will come to the organization/primary contact, but the grant writer will have access to complete the application.

To collaborate, follow the below instructions:

▪ **STEP ONE**: Click on the Collaborate Button

▪ **STEP TWO**: Complete the Collaboration invitation. Be sure to specify whether you’d like the individual to have viewing, editing, or submitting permissions.
- **STEP THREE:** Instruct the individual to check their email and log in to Foundant.

  ![Message from Dwight](image1)

  - **STEP FOUR:** After logging in to Foundant, the invited individual should access the Collaboration Requests tab and **Accept** the invitation to collaborate. They will then have access to the application and all follow up documents.

  ![Lookup](image2)